Hyperion

Installation Start Here

RELEASE 9.3.3

Updated: June 2011

ORACLE

ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Hyperion Installation Start Here, 9.3.3

Copyright © 2007, 2011, Oracle and/or its affiliates. All rights reserved.

Authors: EPM Information Development Team

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS:

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle America, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

Documentation Accessibility 7

Chapter 1. Hyperion Product Components 9

Chapter 2. Upgrading Hyperion Products 11

Chapter 3. System Requirements 13

About System Requirements 13

Changes to System Requirements Since Release 9.3.1.x 14

Foundation Services 15

Shared Services Requirements 16

Shared Services Server Disk Space and RAM 16

User Directories 16

Client Requirements 17

Client OS 18

Processor 18

Required Hyperion Software 18

Assistive Technologies 18

Screen Resolution 19

Runtime Clients 19

Disk Space and RAM 20

Product-Specific Client Requirements 20

Web Browser Client Requirements 21

Other Required Third-Party Software 22

Essbase - System 9 23

Server Requirements 23

Data Source Requirements 26

Reporting and Analysis 27

Server Requirements 27

Data Source Requirements 32

Financial Performance Management Applications 35

Server Requirements 35

Data Management 39

Server Requirements 39

Chapter 4. Release Compatibility 43
How to Read the Tables in This Chapter 43
Shared Services Release Compatibility 43
Essbase - System 9 Release Compatibility 44
Reporting and Analysis Release Compatibility 45
Financial Performance Management Applications Release Compatibility 47
Data Management Release Compatibility 49

Chapter 5. Ports 51
About Default Ports 51
Shared Services Ports 51
Changing the OpenLDAP Port 52
Essbase - System 9 Ports 52
Essbase Ports 53
Administration Services Ports 53
Provider Services Ports 54
Smart Search Ports 55
Reporting and Analysis Ports 55
Foundation Ports 56
Financial Reporting Ports 57
Interactive Reporting Ports 58
Web Analysis Ports 58
Workspace Ports 59
Application Builder J2EE Ports 59
Application Builder.NET Ports 60
Financial Performance Management Applications Ports 60
Financial Management Ports 60
Performance Scorecard Ports 61
Planning Ports 61
Strategic Finance Ports 62
Data Management Ports 62
FDM Ports 62
Data Relationship Management Ports 63

Chapter 6. Upgrading Sequence 65
Upgrading Sequence and Tasks 65
Prerequisite Tasks for All Products 66
Upgrading Shared Services 66

Upgrading Essbase - System 9 67
Upgrading Administration Services 68
Upgrading Integration Services 69
Upgrading Provider Services 69
Upgrading Smart View 70
Upgrading Planning 70
Upgrading Financial Management 72
Upgrading Performance Scorecard 72
Reporting and Analysis Tasks 73
Strategic Finance Tasks 74
Data Relationship Management Tasks 74
FDM Tasks 75

Chapter 7. Changing Repository Passwords 77
About Repository Password Maintenance 77
Changing the Shared Services Repository Password 77
Changing the Administration Services Repository Password 78
Changing Reporting and Analysis Repository Passwords 78
Changing the Workspace Repository Password 78
Changing the Financial Reporting Repository Password 79
Changing the Web Analysis Repository Password 79
Changing Financial Performance Management Applications Repository Passwords 80
Changing the Planning Repository Password 80
Changing the Financial Management Repository Password 81
Changing the Performance Scorecard Repository Password 82
Changing Data Management Repository Passwords 82
Changing the FDM Repository Password 83
Changing the Data Relationship Management Repository Password 83

Appendix A. Startup Dependencies and Default URLs 85
Summary List of Services and Processes 85
Services and Processes 86
1. Shared Services OpenLDAP 86
2. Shared Services Application Server 86
3. Reporting and Analysis Core Services 87
4. Essbase 87
5. Administration Services Application Server 88
6. Integration Services 88
7. Provider Services Application Server 88
8. Reporting and Analysis Services/Processes 89

9. Application Server Services/Processes 92
10. Remaining Product Services 92
Default URLs 96

Appendix B. Using Release 9.3.3 Products With Components From Later Releases 97
Using Release 9.3.3 Products With Performance Management Architect 97
Updating the Shared Services Registry 99
Using Reporting and Analysis 11.1.1.3 with Planning 9.3.3 102
Using Performance Management Architect With Release 11.1.2 Products 103
Using Release 9.3.3 Products With Disclosure Management 11.1.2 103
Using Release 9.3.3 Products with Financial Close Management Release 11.1.2 106
Additional Procedures for Financial Management 108
Additional Procedures for Reporting and Analysis 112
Additional Procedures for FDM 112

Index 113

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

1 Hyperion Product Components

Check on Oracle® Technology Network to see if an updated version of this guide is available.

Use this document to help plan your Hyperion product installation and configuration. After reading this document, use it in conjunction with the product Readmes to install, configure, and manually deploy products.

Primary components of Hyperion products:

- Oracle's Hyperion® Foundation Services
- Oracle's Hyperion® Essbase - System 9
- Oracle's Hyperion® Reporting and Analysis – System 9
- Oracle's Hyperion® Financial Performance Management Applications
- Data Management

Table 1 Hyperion Product Components

Hyperion Product Component	Products Associated with Component
Foundation Services	Oracle's Hyperion® Shared Services
	Oracle's Hyperion® Smart View for Office
Essbase - System 9	Oracle's Hyperion® Essbase® – System 9
	Oracle's Essbase® Administration Services
	Oracle's Essbase® Integration Services
	Oracle's Hyperion® Provider Services
	Oracle's Hyperion® Smart Search
Reporting and Analysis	Oracle's Hyperion® Interactive Reporting – System 9
	Oracle's Hyperion® Financial Reporting – System 9
	Oracle's Hyperion® SQR® Production Reporting – System 9
	Oracle's Hyperion® Web Analysis – System 9
Financial Performance Management Applications	Oracle's Hyperion® Planning – System 9

Hyperion Product Component	Products Associated with Component
	Oracle's Hyperion® Financial Management – System 9
	Oracle's Hyperion® Performance Scorecard – System 9
	Oracle's Hyperion® Strategic Finance
Data Management	Oracle's Hyperion® Financial Data Quality Management
	Oracle's Hyperion® Data Relationship Management and Oracle's Hyperion® Data Relationship Management Web Publishing

Note: Oracle's Hyperion® Workspace is the Web client for Reporting and Analysis, Planning, and Financial Management and is part of the Reporting and Analysis installation.

2 Upgrading Hyperion Products

You can only upgrade to Release 9.3.3 from Release 9.3.1.x. See individual product Readmes for installation/upgrade procedures.

This guide and the individual product Readmes assume that you have Release 9.3.1.x installed and configured. If you are using a release prior to 9.3.1.x, you must first upgrade to 9.3.1.x, and then upgrade to 9.3.3.

Note: If you are using Oracle's Enterprise Performance Management Architect in Release 9.3.1.x, you must upgrade to Performance Management Architect Release 11.1.1.3. See "Using Release 9.3.3 Products With Performance Management Architect" on page 97.

Note: To use Release 9.3.3 products with Oracle Hyperion Disclosure Management 11.1.2 or Oracle Hyperion Financial Close Management 11.1.2, see "Using Release 9.3.3 Products With Performance Management Architect" on page 97.

3 System Requirements

In This Chapter

About System Requirements....13
Changes to System Requirements Since Release 9.3.1.x....14
Foundation Services....15
Client Requirements....17
Essbase - System 9....23
Reporting and Analysis....27
Financial Performance Management Applications....35
Data Management....39

About System Requirements

This chapter describes system requirements for Hyperion products.

The Hyperion product-specific system requirements are grouped into five categories:

- Foundation Services:
  - Shared Services
  - User Directories
- Essbase - System 9:
  - Essbase
  - Administration Services
  - Integration Services
  - Provider Services
- Reporting and Analysis:
  - Financial Reporting
  - Interactive Reporting
  - SQR Production Reporting
  - Web Analysis
  - Workspace
- Financial Performance Management Applications:

- Performance Management Architect
- Financial Management
- Performance Scorecard
- Planning
- Strategic Finance

- Data Management:
  - FDM
  - Data Relationship Management

For each product section, additional requirements are described in the Server Requirements sections; for example: OS/Processor, disk space and RAM, and third-party software requirements.

Disk space and RAM requirements are approximate and do not include additional possible requirements on the machine, such as extra space needed for a VMware image. The installation program calculates the required disk space, based on your installation choices. Disk space estimates include documentation files (if applicable) and Hyperion common components. Documentation is installed automatically with some products.

The requirements described in this chapter are for a representative deployment of up to 150 total users (30 to 40 concurrent users) for one installation of a Hyperion product. For larger and more complex deployments—a larger number of users, multiple installations of one product, and installations of multiple products—Hyperion highly recommends that you contact Hyperion Consulting Services to determine the appropriate number of servers for your environment.

For information on prerequisites, see Chapter 3, "System Requirements."

For information on current and forward compatibility with other Hyperion products, see Chapter 4, "Release Compatibility."

Before installing Hyperion products, verify that all system requirements and prerequisites are met.

Note: Hyperion 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, Hyperion 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 Hyperion product code.

Changes to System Requirements Since Release 9.3.1.x

Following is a table listing the changes in system requirements since Release 9.3.1.x:

Table 2 List of Changes to System Requirements Since Release 9.3.1.x

Requirement Type	Change
Server Operating Systems	• Dropped support for AIX 5.2 • Dropped support for Windows Itanium
Client Operating Systems	Added support for Windows 7
Client Third Party Software	Added support for Microsoft Office 2010 (32-bit only)
Web Browsers	• Dropped support for Internet Explorer 5 and 6 (for certain products.) Added support for Internet Explorer 8 • Changed support for Firefox from 1.5.0.3 and 2.0.0.0.3 to Firefox 3.5+
Web Application Servers	No change in support
JRE	• Changed support for Web plug-in - changed from 1.5.0_09 and 1.4.2_12 to 1.5.0_17+ • Changed support for Sun JRE changed from 1.5.0_11 and Sun 1.4.2_13 to Sun 1.5.0_21 • Changed support for IBM JRE changed from 1.5.0 SR5 to 1.5.(build pap32devfix-20100128a (SR11 FP1)+ • Changed support for HP JRE changed from 1.5.0_08 to HP 1.5.0_19+
Database Repositories	• Added support for Oracle 11.2 including RAC • Added support for Microsoft SQL Server 2008 as repository • Dropped support for IBM DB2 8.2 as repository
Database Data Sources	• Added support for Oracle 11. 2 • Added support for Microsoft SQL Server 2008 • Added support for Teradata 13 • Changed support for Informix 9.x to 11.5 • Dropped support for IBM DB2 8.1.7 • Dropped support for IBM DB2 Z/os
Database Drivers	• Changed support for DataDirect JDBC 3.6 to JDBC 4.1 • Changed support for DataDirect ODBC 5.2 to ODBC 6.0 SP2
User Directories	• Changed support for Tivoli 5.2 to 6.2 • Changed support for Domino LDAP from 6.0 to 8.5

Foundation Services

- "Shared Services Requirements" on page 16
- "Shared Services Server Disk Space and RAM" on page 16
- "User Directories" on page 16

Shared Services Requirements

Shared Services is considered a component of other Hyperion products. In general, Shared Services supports the same platform as the products it is used with; therefore, the system requirements for the Shared Services server are not called out specifically. Shared Services is included in "Client Requirements" on page 17. You can assume that Shared Services supports the same software that is listed in each product-specific section of this chapter, unless otherwise noted. Disk space and RAM for Shared Services server is listed below.

Shared Services Server Disk Space and RAM

Item	Requirement
Disk Space	400 MB[1]
RAM	1.5 GB

[1]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.

User Directories

A user directory is required for external authentication through Shared Services for all products except Data Relationship Management (optional feature for that product).

User Directories	Notes

• IBM Tivoli Directory Server 6.2
• Lightweight Directory Access Protocol (LDAP)
  ○ Sun ONE 5.2 SP4
  ○ Novell eDirectory 8.8
  ○ IBM Directory Server 5.1
  ○ Domino LDAP 8.5
• Microsoft Active Directory 2008
• Microsoft Active Directory 2003
• Microsoft Active Directory 2000
• Microsoft NTLM[1]
• OpenLDAP 2.3.37	

• Netegrity SiteMinder 6	
Oracle Identity Management (OIM) 10.1.4.0.1, including these components: • Oracle Internet Directory 10.1.4.0.1 • Oracle Virtual Directory 10.1.4.0.1	

User Directories	Notes
SAP Directory • SAP R/3 Enterprise 5.0	
Database providers: • Oracle 11*g* • Oracle 11*g* (11.1, 11.2) • Oracle 10*g* Release 2 (10.2.0.2) • Oracle 10g (10.1.0.5) • Oracle 9*i* (9.2.0.5) • Microsoft SQL Server 2008 • Microsoft SQL Server 2005 SP1 • Microsoft SQL Server 2000 SP3a • IBM DB2 9.1	

[1]Shared Services running on UNIX requires Oracle's Hyperion® Remote Authentication Module™ for UNIX authentication.

Client Requirements

Hyperion client products have the following system requirements:

- General Requirements
  - "Client OS" on page 18
  - "Processor" on page 18
  - "Required Hyperion Software" on page 18
  - "Assistive Technologies" on page 18
  - "Screen Resolution" on page 19
  - "Runtime Clients" on page 19
  - "Disk Space and RAM" on page 20
  - "Product-Specific Client Requirements" on page 20
- Web Browser Client Requirements
  - "Web Browsers" on page 21
  - "Web Browser Plug-in" on page 21
  - "Java Runtime Environment" on page 21
- Other Third Party Requirements
  - "Other Required Third-Party Software" on page 22

Client OS

Operating System	Notes
• Windows 7 • Windows Vista • Windows XP Professional SP2 • Windows 2003 SP1 • Windows 2000 Professional SP4* • Windows 2000 Server SP4* • Oracle Enterprise Linux 4[12] Red Hat Linux[3]: • Red Hat Linux AS 4 Update 2 with glibc-2.3.4-2.13 or later • Red Hat Linux EL 4	

[1]For supporting browser-based clients only. For Interactive Reporting, only the HTML client is supported; the plug-in client is not supported.

[2]Reporting and Analysis supports only the x86 processor.

[3]For supporting browser-based clients only. For Interactive Reporting, only the HTML client is supported; the plug-in client is not supported.

Processor

Processor (Windows)	Notes
Pentium 4, 1.6 GHz	The minimum required for all products except for the products listed below.
One of the following: • 2 GHz (light use-Defined as fewer than 50 users connecting to the server to check entities in and out or to run server-based consolidation for structures that contain fewer than 15 entities.) • 3.2 GHz (heavy use-Defined as 50 or more users connecting to the server to check entities in and out or to run server-based consolidation for structures that contain more than 15 entities.)	Applies only to Strategic Finance
2 GHz minimum	Applies only to Data Relationship Management

Required Hyperion Software

If you are using Smart View to access Essbase as a data source, Provider Services is required.

Assistive Technologies

Assistive Technologies apply only to Windows operating systems and Microsoft Internet Explorer.

Not supported for:

- Reporting and Analysis
- Oracle's Hyperion® Shared Services User Management Console
- Strategic Finance

Assistive Technologies	Supported Versions
Screen reader	• JAWS 7 • JAWS 6.2 • Window Eyes 5.5
Screen magnifier	• MAGic 9.3 • MAGic 9.0

Screen Resolution

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

Runtime Clients

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

For information on Hyperion product compatibility, see Chapter 4, "Release Compatibility."

Clients	Runtime Client
• Financial Reporting • Interactive Reporting • SQR Production Reporting • Web Analysis	• Essbase—The Essbase runtime client is installed automatically. • Microsoft SQL Server 2000 SP3a Analysis Services • Microsoft SQL Server 2005 SP1 Analysis Services • Microsoft SQL Server 2008 Analysis Services
• Financial Reporting • Web Analysis	• 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 runtime client must be installed on the Financial Reporting machine and is a component named Planning ADM Driver in the Planning installer.
Web Analysis	• Java Plug-in: 1.5.0_17+ JRE is downloaded to the client computer when a user logs on to Oracle's Hyperion® Web Analysis Studio. The `WebAnalysis.properties` file contains settings for the correct version of JRE. See the *Hyperion Reporting and Analysis – System 9 Installation Guide*.
Planning	Essbase—The Essbase runtime client should be updated (see the *Hyperion Planning Release 9.3.3 Readme.* .

Disk Space and RAM

This section does not apply to Web browser clients.

RAM requirements are 512 MB minimum, 1 GB recommended.

Product Grouping	Component	Disk Space	Notes
Oracle's Hyperion® Foundation Services	Smart View	45 MB, 50 MB for Smart View with Oracle's Hyperion® Essbase® Visual Explorer	
Essbase - System 9	Essbase Runtime Client	150 MB	
	UNIX Essbase Runtime Client	150 MB	
	Essbase Administration Services Console	150 MB	
	Essbase Integration Services Console	46 MB	
Reporting and Analysis	Financial Reporting	200 MB	
	Interactive Reporting	500 MB	
	SQR Production Reporting	200 MB	
Financial Performance Management Applications	Web Analysis	2 GB	
	Financial Management	50 MB	
	Performance Scorecard	250 MB	
	Strategic Finance	210 MB	
Data Management:	PowerCenter Client	200 MB	
	FDM: Workbench Client	 200 MB	
	Data Relationship Management[1]	20 MB	

[1]If users pre-load applications or if multiple applications open simultaneously, more RAM is recommended.

Product-Specific Client Requirements

Financial Reporting and Web Analysis

To perform chart generation in UNIX, Financial Reporting and Web Analysis UI services require access to a graphics display device, either real or virtual. Hyperion recommends that an X virtual frame buffer (Xvfb) be used instead of a hardware graphics display device (because Xvfb performs all operations in memory and does not require that a screen or input device be attached

to the computer). See the *Hyperion Reporting and Analysis – System 9 Installation Guide for UNIX*.

Web Browser Client Requirements

Web Browsers

Web browsers are required for:

- Shared Services
- Workspace
- Administration Services
- Reporting and Analysis
- Financial Management
- Performance Scorecard
- Planning
- FDM

Supported Web Browsers	Notes
• Microsoft Internet Explorer 8.0 • Microsoft Internet Explorer 7.0 • Microsoft Internet Explorer 6.0 • Firefox 3.5+	1. Microsoft Internet Explorer 6.0 supported only for Shared Services, Workspace, Financial Reporting, Smart View, Financial Management, and Planning. 2. FDM does not support Firefox.

Set your browser to enable JavaScript and cookies. Storing cookies on your computer is recommended; at a minimum, allow per-session (not stored) cookies. If a Web site is a trusted site, enable SSL (HTTPS).

Web Browser Plug-in

Planning does not require a Web browser plug-in.

Platform	Supported Versions
32-bit	JRE 1.5.0_17+
64-bit	JRE 1.5.0_17+

Java Runtime Environment

A JRE is required for all products except Strategic Finance and is automatically installed.

Platform	Supported Windows Versions	Supported UNIX Versions	Notes
32-bit	JRE 1.5.0 Update 21	• AIX: IBM 1.5.0 (build pap32devfix-20100128a (SR11 FP1)+ • Linux and Solaris: JRE 1.5.0 Update 21 • HP-UX: 1.5.0.19+	
64-bit[1][2]	JRE 1.5.0 Update 21	• AIX: IBM 1.5.0 (build pap32devfix-20100128a (SR11 FP1)+ • Linux and Solaris: JRE 1.5.0 Update 21 • HP-UX: 1.5.0.19+	

[1]To run 64-bit Essbase on 64-bit operating systems, 64-bit JVM is required. JVM is required for triggers, data mining, and custom-defined functions that are used in calculation scripts.

[2]Planning supports 64–bit JRE for HP-UX and Windows 2003 64–bit only.

Other Required Third-Party Software

Supported Software	Notes
Adobe Acrobat Reader 6.0 or later	
DCOM enabled on the client computer	Required only for Financial Management when running the Financial Management Win32 client, or when running the Financial Reporting client against a Financial Management application.
• One of the following: ❍ Microsoft Office 2010 (32-bit only) ❍ Microsoft Office 2007 ❍ Microsoft Office 2003 ❍ Microsoft Office XP (2002) ❍ Microsoft Office 2000	• A version of Microsoft Excel is required to use Smart View with: ❍ Reporting and Analysis ❍ Financial Management ❍ Planning
Microsoft SQL Server (2008, 2005 SP1 or 2000 SP3a) Analysis Services client	Required only for: • Interactive Reporting • Financial Reporting[1] • Web Analysis
• SAP GUI 6.20 OLE DB for OLAP Provider • SAP GUI 6.4 OLE DB for OLAP Provider	Required only for Interactive Reporting
SAP Java Connector (JCO) 2.1.7–Optional—used to connect to SAP BW.[2]	Required only for: • Financial Reporting • SQR Production Reporting[3] • Web Analysis

[1]Microsoft SQL Server Analysis Services is supported only by Financial Reporting on Windows. The SSAS client and SSAS server versions must match.

[2]Configure the SAP data source access and authentication after installation, when Reporting and Analysis create the correct SAP directories. Download it as a registered user at https://service.sap.com/connectors.

[3]If you are installing SQR Production Reporting DDO, SAP Java Connector (JCO) drivers are required. 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.

Essbase - System 9

This section lists the requirements for:

- Essbase
- Administration Services
- Integration Services
- Provider Services
- Shared Services

Server Requirements

Essbase - System 9 server requirements:

- "Server OS/Processor" on page 23
- "Disk Space and RAM" on page 24
- "Hyperion Software" on page 25
- "Repository Databases" on page 25
- "Java Application Server" on page 25
- "Data Source Requirements" on page 26

Server OS/Processor

Operating System	Platform	Processor	Notes
Windows: • Windows 2003 SP1 • Windows 2000 Server SP4	32-bit	x86	
• Windows 2003 SP1 (Server Enterprise Edition)	64-bit	x64	• For example, AMD Opteron or Intel Xeon. • Supported with 32–bit or 64–bit installers except for Administration Services and Integration Services which are supported only with 32–bit installers.
HP-UX: • HP-UX 11.11	32–bit	Risc	

Operating System	Platform	Processor	Notes
HP-UX: ● HP-UX 11.11	64-bit	PA-RISC	**Note:** All products are only supported on this processor with 32-bit installer.
● HP-UX 11.31 ● HP-UX 11.23	64-bit	Itanium 2	Administration Services and Provider Services only support HP-UX 64-bit if Tomcat is used as the application server.
IBM AIX: AIX 5.3 ML3	32-bit	PowerPC	
AIX 5.3 ML3	64-bit	PowerPC	Supported with 32-bit or 64-bit installers except for Administration Services which is supported only with 32-bit installer.
Oracle Enterprise Linux 4	32-bit	x86	
Red Hat Linux: ● Red Hat Linux AS 4 Update 2 with glibc-2.3.4-2.13 or later ● Red Hat Linux EL 4	32-bit	x86	
Solaris: ● Solaris 10 ● Solaris 9	32-bit	SPARC V9	
● Solaris 10 ● Solaris 9	64-bit	SPARC V9	Supported with 32-bit or 64-bit installers except for Administration Services which is supported only with 32-bit installer.

Disk Space and RAM

Disk space and RAM requirements are for Hyperion products and sample applications.

Component	Disk Space	RAM	Notes
Essbase Server[1]	1 GB	1 GB	
Application Programming Interface	20 MB	256 MB minimum	
Analytic Administration Server	500 MB[2]	32 MB times the number of concurrent Administration Server users For example, 32 MB * 10 users = 320 MB. For detailed RAM requirements, see the *Essbase Administration Services Installation Guide*.	
Essbase Integration Server	170 MB	256 MB	
Provider Services	340 MB	128 MB	

[1]32-bit Administration Server supports both 32-bit and 64-bit Essbase Server. 64-bit Administration Server supports only 64-bit Essbase Server.

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

Hyperion Software

Required Hyperion Software	Required For	Notes
Shared Services (unless using Essbase in native security mode)	• Essbase • Administration Services • Provider Services	See "Shared Services Requirements" on page 16.
Essbase	• Administration Services • Integration Services • Provider Services	
Administration Services	Provider Services	
Smart View	Provider Services	

Repository Databases

A repository is required for:

- Administration Services (only when using Log Analyzer)
- Integration Services
- Shared Services

Supported Relational Data Repositories	Notes
Oracle:[1] • Oracle 11*g* (11.1 and 11.2)[2] • Oracle 10*g* Release 2 (10.2.0.2) • Oracle 10g (10.1.0.5) • Oracle 9*i* (9.2.0.5)	
• Microsoft SQL Server 2008 • Microsoft SQL Server 2005 SP1[3] • Microsoft SQL Server 2000 SP3a	
• IBM DB2 9.1	

[1]For all supported versions of Oracle: 1) 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.

[2]Oracle 11*g* requires Oracle Hyperion Configuration Utility Service Fix 9.3.1.0.01.

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

Java Application Server

If an application contains more than 500 users and 10,000 measures, deploy to a Java application server cluster for increased scalability.

Java Application Servers are required for:

- Administration Services
- Provider Services
- Shared Services

Note: Only 32-bit application servers are supported.

Supported Java Application Servers	Notes
Apache Tomcat 5.0.28[1]	
• BEA WebLogic 9.2[2] • BEA WebLogic 9.1 • BEA WebLogic 8.1.6[3]	Also includes support for WebLogic Express.
• IBM WebSphere 6.1.0.5[4] • IBM WebSphere 6.0.2.11	
• Oracle 10g Release 3 (10.1.3.1.0) • Oracle 10g Release 2 (10.1.2.0.2)	

[1]Apache Tomcat is automatically installed on all platforms. For deployments that require high availability or failover, Hyperion recommends using a commercially supported Java application server that supports high availability and failover.

[2]When manually deploying Shared Services to WebLogic 9.2, you must set the `<enfore-valid-basic-auth-credentials>` tag to `false` in the `<DOMAIN_LOCATION>/<DOMAIN_NAME>/config/config.xml` file.

[3]Hyperion release 9.3.1 is the last release to support BEA WebLogic 8.1.6.

[4]WebSphere Express, ND, and XD Editions are supported for each supported version of WebSphere; ND and XD are supported only via manual deployment.

Data Source Requirements

Database Connectivity

Database Connectivity applies only to Essbase SQL Interface and Integration Services.

Drivers Supported	Connectivity	Notes
DataDirect 6.0 SP1	ODBC	
DataDirect 4.1	JDBC	

Supported Data Source Databases	Componentsme and Connectivity	Notes
Oracle • 11g (11.1, 11.2) • 10g (10.1.0.5, 10.2.0.2) • 9.2.0.5	Essbase SQL Interface—ODBC Integration Services—ODBC	• For all supported versions of Oracle database: (a) includes support for Real Application Clusters (RAC) and ASM (b) includes support for SE, SEQ, and EE. • The Oracle OLE provider and Oracle Database server must be the same version.

Supported Data Source Databases	Componentsme and Connectivity	Notes
• IBM DB2 9.1	Essbase SQL Interface—ODBC Integration Services—ODBC	

• Microsoft SQL Server:
  ❍ Microsoft SQL Server 2008
  ❍ Microsoft SQL Server 2005 SP1
  ❍ Microsoft SQL Server 2000 SP3a
	Essbase SQL Interface—ODBC Integration Services—ODBC
	Note: On Windows, you can use the SQL Server Native Driver on Windows or DataDirect 6.0 SP1. On UNIX, use DataDirect 6.0 SP1.
		The SQL Server native driver must be obtained separately from Microsoft.

MySQL 5.x	Integration Services—MySQL Connector/ ODBC 3.51x (Windows, Linux, Solaris)	• Obtain the ODBC driver separately from MySQL • Essbase and MySQL may each be installed on different machines; however the MySQL ODBC driver must be installed on the machine where Essbase resides.
Teradata • Teradata V13 (Teradata ODBC driver version 13.0) • 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)	Essbase SQL Interface—ODBC Integration Services—ODBC	• Teradata ODBC drivers must be obtained separately from Teradata. • Essbase supports Teradata Parallel Transporter (TPT) 13 which connects to Teradata V13 databases; TPT 12 which connects to V12 databases; and TPT 3.06 which connects to V2R6.0 databases. For more information, see the Release 9.3.1 *Oracle Essbase SQL Interface Guide*.

Reporting and Analysis

This section lists the requirements for:

- Financial Reporting
- Interactive Reporting
- SQR Production Reporting
- Web Analysis
- Workspace
- Shared Services

Server Requirements

Reporting and Analysis server requirements:

- "Server OS/Processor" on page 28

- "Disk Space and RAM" on page 28
- "Required Hyperion Software" on page 29
- "Required Third-Party Software" on page 29
- "Repository Databases" on page 29
- "Java Application Servers and Web Servers" on page 30

Server OS/Processor

Operation System	Platform	Processor	Notes
Windows: • Windows 2003 SP1 • Windows 2000 Server SP4	32-bit	x86	
Windows: • Windows 2003 SP1 • Windows 2000 Server SP4	64-bit	x64	Supported with 32-bit installers
HP-UX: • HP-UX 11.31 • HP-UX 11.23	64–bit	Itanium 2	Interactive Reporting services run only in 32–bit mode. Connectivity to Interactive Reporting data sources in a 64–bit operating system requires a 32–bit database client.
• HP-UX 11.11[1]	32-bit	RISC	
IBM AIX: AIX 5.3 ML3	32-bit [2]	PowerPC	
Red Hat Linux: • Red Hat Linux AS 4 Update 2 with glibc-2.3.4-2.13 or later • Red Hat Linux EL 4	32-bit	x86	
Solaris: • Solaris 10 • Solaris 9	32-bit	SPARC	

[1]Release 9.3.x is the last release to support HP-UX 11.11 RISC.

[2]If running Reporting and Analysis on a UNIX platform, do not use Financial Management as a data source.

Disk Space and RAM

Disk space and RAM requirements are for Hyperion products and sample applications.

Component	Disk Space	RAM
Workspace	1 GB For services: 200 MB For importing files: 1 GB minimum	1 GB For services: 1 GB minimum
Financial Reporting	200 MB	1 GB
Interactive Reporting	500 MB	1 GB
SQR Production Reporting	200 MB	256 MB
Web Analysis	800 MB	1 GB

Required Hyperion Software

Reporting and Analysis requires Shared Services. See also "Shared Services Requirements" on page 16.

Required Third-Party Software

Software	Required For	Notes

• One of the following Distillers:
  ❍ Adobe Acrobat Distiller Server 8.0 or 6.0
  ❍ AFPL Ghostscript 8.63 or 8.54, or GNU Ghostscript 7.0.6
	Required only for Financial Reporting[1]	

One of the following: • Microsoft SQL Server (2008, 2005 SP1 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: • 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 SP1 or 2000 SP3a) Analysis Services. The SSAS client and SSAS server versions must match.	• Financial Reporting • SQR Production Reporting • Web Analysis	
SQL Grid connectivity (Supports SQL Grid with Oracle, IBM DB2, and Microsoft SQL Server)—Merant drivers	• Financial Reporting • Web Analysis	

[1]For Financial Reporting, you must use Ghostscript and not Distiller to import content into Microsoft Word and PowerPoint. When you run Oracle's Hyperion® Configuration Utility™, you must choose AFPL Ghostscript 8.54 or GNU Ghostscript 7.0.6.

Repository Databases

One of the following must be used as the repository database:

Database	Notes
Oracle[1]: ● Oracle 11*g* (11.1 and 11.2)[2] ● Oracle 10*g* Release 2 (10.2.0.2) ● Oracle 10*g* (10.1.0.5) ● Oracle 9*i* (9.2.0.5)	
IBM DB2: ● IBM DB2 9.1	
Microsoft SQL Server: ● Microsoft SQL Server 2008 ● Microsoft SQL Server 2005 SP1[3] ● Microsoft SQL Server 2000 SP3a	

[1]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.

[2]Oracle 11*g* requires Oracle Hyperion Configuration Utility Service Fix 9.3.1.0.01.

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

Java Application Servers and Web Servers

If an application contains more than 500 users and 10,000 measures, deploy to a Java application server cluster for increased scalability.

A Java Application Server is required for:

- Financial Reporting
- Web Analysis
- Workspace (includes Interactive Reporting and SQR Production Reporting)
- Shared Services

Note: Only 32-bit application servers are supported.

Supported Java Application Servers	Notes
● Apache Tomcat 5.0.28[1]	
● BEA WebLogic 9.2[2] ● BEA WebLogic 9.1 ● BEA WebLogic 8.1.6[3]	Also includes support for WebLogic Express.
● IBM WebSphere 6.1.0.5 ● IBM WebSphere 6.0.2.11[4]	
● Sun Java Enterprise System 8.1 05Q4[5]	Does not apply to Shared Services

Supported Java Application Servers	Notes
• Oracle 10g Release 3 (10.1.3.1.0) • Oracle 10g Release 2 (10.1.2.0.2)	• Includes support for Oracle Application Server Single Sign-On, for Workspace only. • Not supported for Financial Reporting

[1]Apache Tomcat is automatically installed on all platforms. For deployments that require high availability or failover, Hyperion recommends using a commercially supported Java application server that supports high availability and failover.

[2]When manually deploying Shared Services to WebLogic 9.2, you must set the `<enfore-valid-basic-auth-credentials>` tag to `false` in the `<DOMAIN_LOCATION>/<DOMAIN_NAME>/config/config.xml` file.

[3]Hyperion release 9.3.1 is the last release to support BEA WebLogic 8.1.6.

[4]WebSphere Express, ND, and XD Editions are supported for each supported version of WebSphere; ND and XD are supported only via manual deployment.

[5]Supported on Solaris platforms only, via manual deployment; auto-deployment using Hyperion Configuration Utility is not supported for Sun Java Enterprise System.

A Web Server is required for:

- Financial Reporting
- Web Analysis
- Workspace (includes Interactive Reporting and SQR Production Reporting)

Web Server	Notes
Supported Windows Versions: • Apache Server 2.0.52 • IBM HTTP Server 6.1 • IBM HTTP Server 6.0 • Microsoft IIS 6.0 (on Windows 2003 SP1) • Microsoft IIS 5.0 (on Windows Server 2000 SP4) • Oracle HTTP Server	
Supported UNIX Version: • Apache Server 2.0.52 • IBM HTTP Server 6.1 • IBM HTTP Server 6.0 • Oracle HTTP Server	

Data Source Requirements

Databases as Data Sources

Supported Data Source Databases	Reporting and Analysis Modules and Connectivity	Notes
Hyperion data sources: one or more of the following: ● Essbase	● Interactive Reporting—C API / MDX ● Financial Reporting—ADM ● Web Analysis—ADM ● SQR Production Reporting—DDO	
● Financial Management	● Financial Reporting—ADM ● Web Analysis—ADM	The version of Financial Management ADM must match the version of Financial Management Server
● Planning	● Financial Reporting—ADM ● Web Analysis—ADM	● 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.
● Oracle[1]: ❍ Oracle 11*g*(11.1 and 11.2)[2] ❍ Oracle 10*g* Release 2 (10.2.0.2) ❍ Oracle 10*g* (10.1.0.5) ❍ Oracle 9*i* (9.2.0.5)	● Interactive Reporting—OCI, ODBC ● SQR Production Reporting—OCI, ODBC, JDBC ● Web Analysis—JDBC	
● One of the following: ❍ Microsoft Access 2007 ❍ Microsoft Access 2003 ❍ Microsoft Access XP (2002) ❍ Microsoft Access 2000	SQR Production Reporting—ODBC	Supported only by SQR Production Reporting — Windows only
● IBM DB2 9.1	● Interactive Reporting—ODBC ● SQR Production Reporting—ODBC, JDBC, DB2 Connect ● Web Analysis—JDBC	
● IBM DB2 8.2	● Interactive Reporting—ODBC ● SQR Production Reporting—ODBC, JDBC, DB2 Connect ● Web Analysis—JDBC	

Supported Data Source Databases	Reporting and Analysis Modules and Connectivity	Notes
• IBM DB2: ❍ IBM DB2 OLAP Server 8.2		Not supported by: • Oracle's Hyperion® Interactive Reporting Studio • Oracle's Hyperion® Financial Reporting Studio • Web Analysis
• Informix 11.5	SQR Production Reporting—ODBC, JDBC, SDK 2.81	Supported only by SQR Production Reporting
• Informix 11.5	Interactive Reporting—ODBC	Supported only by Interactive Reporting

• Microsoft SQL Server:
  ❍ Microsoft SQL Server 2008
  ❍ Microsoft SQL Server 2005 SP1[3]
  ❍ Microsoft SQL Server 2000 SP3a
	• Interactive Reporting—ODBC
	• SQR Production Reporting—ODBC, JDBC
	• Web Analysis—JDBC	

• Microsoft SQL Server:[4]
  ❍ Microsoft SQL Server 2008 Analysis Services
  ❍ Microsoft SQL Server 2005 SP1 Analysis Services
  ❍ Microsoft SQL Server 2000 SP3a Analysis Services
	• Interactive Reporting—ODBO
	• Financial Reporting—ADM
	• SQR Production Reporting—DDO
	• Web Analysis—ADM	

• OpenEdge 10.1B	SQR Production Reporting—ODBC	Supported only by SQR Production Reporting
• Progress 9.1E04	SQR Production Reporting—ODBC	Supported only by SQR Production Reporting
• Red Brick 6.3 or higher	• Interactive Reporting—ODBC • SQR Production Reporting—ODBC	Supported only by: • Interactive Reporting—Windows only • SQR Production Reporting —Windows only
SAP: • SAP BW 3.1 or 3.5 • NetWeaver BI (SAP BW) 7.0	• Financial Reporting—BAPI • Interactive Reporting—ODBO • SQR Production Reporting—BAPI • Web Analysis—BAPI	
SAP R/3 • SAP R/3 Enterprise (mySAP ERP 2005) 4.6C / 6.x	• SQR Production Reporting—BAPI	Supported only by SQR Production Reporting

Supported Data Source Databases	Reporting and Analysis Modules and Connectivity	Notes
• Sybase 15	• Interactive Reporting—ODBC • SQR Production Reporting—ODBC, JDBC, CTLIB	Supported only by: • Interactive Reporting • SQR Production Reporting
• Sybase ASE 12.5.1 and 12.5.2 and later	• Interactive Reporting—ODBC • SQR Production Reporting—ODBC, JDBC, CTLIB	Supported only by: • Interactive Reporting • SQR Production Reporting
• Sybase IQ 12.6 and later	• Interactive Reporting—ODBC • SQR Production Reporting—ODBC	Supported only by: • Interactive Reporting—Windows only • SQR Production Reporting—Windows only
Teradata:[5] • Teradata V13 (Teradata ODBC driver version 13.0) • 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)	• Interactive Reporting—ODBC • SQR Production Reporting—ODBC, PP2(Solaris, PA-RISC HP-UX) • Web Analysis—JDBC	Supported only by: • Interactive Reporting • SQR Production Reporting • Web Analysis
Teradata (ODBC):[6] • Teradata V13 (Teradata ODBC driver version 13.0) • 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)	• Interactive Reporting—ODBC • SQR Production Reporting—ODBC, PP2 (Solaris, PA-RISC HP-UX) • Web Analysis—JDBC	Not supported by Financial Reporting
Teradata (JDBC):[7] • Teradata V13 • 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)	• Web Analysis—JDBC	Not supported by Financial Reporting

[1]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.

[2]Oracle 11*g* requires Oracle Hyperion Configuration Utility Service Fix 9.3.1.0.01.

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

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

[5]Teradata ODBC drivers must be obtained separately from Teradata.

[6]Obtain the driver separately from the Teradata web site.

[7]Obtain the driver separately from the Teradata web site.

Financial Performance Management Applications

This section lists the requirements for:

- Financial Management
- Performance Scorecard
- Planning
- Strategic Finance
- Shared Services

Server Requirements

Financial Performance Management Applications server requirements:

- "Server OS/Processor" on page 35
- "Disk Space and RAM" on page 36
- "Required Hyperion Software" on page 36
- "Required Third-Party Software" on page 37
- "Repository Databases" on page 37
- "Java Application Servers and Web Servers" on page 38

Server OS/Processor

Operating System	Platform	Processor	Notes
• Windows 2003 SP1[1] • Windows 2000 Server SP4	32-bit	Dual Pentium 4. 2 GHz minimum	Supported only by: • Financial Management Server • Database Server for Financial Management • Planning • Performance Scorecard
• Windows 2003 SP1 • Windows 2000 Server SP4	32-bit	Dual Pentium 2. 8 GHz minimum	Supported only by: Strategic Finance Server[2]
• HP-UX 11.23	64-bit	Itanium 2	Not supported by: • Financial Management • Strategic Finance Planning supports HP-UX 11.23 64-bit only for Web using Tomcat.
HP-UX: • HP-UX 11.11[3]	32–bit	PA-RISC	Not supported by: • Financial Management

Operating System	Platform	Processor	Notes
IBM AIX: AIX 5.3 ML3	32-bit	PowerPC	Supported only by: ● Performance Scorecard ● Planning
Oracle Enterprise Linux 4	32-bit		Not supported by: ● Financial Management ● Planning
Red Hat Linux: ● Red Hat Linux AS 4 Update 2 with glibc-2.3.4-2.13 or later ● Red Hat Linux EL 4	32-bit	x86	Supported only by: ● Performance Scorecard
Solaris: ● Solaris 10 ● Solaris 9	32-bit	SPARC	Supported only by: ● Performance Scorecard ● Planning

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

[2]Strategic Finance Server —Requires a Dual or Quad Pentium for 50 or more users connecting to the server to check entities in and out or to run server-based consolidation for structures that contain more than 15 entities.

[3]Release 9.3.x is the last release to support HP-UX 11.11 PA-RISC.

Disk Space and RAM

Disk space and RAM requirements are for Hyperion products and sample applications.

Component	Disk Space	RAM	Notes
Financial Management Server	32 GB (10 GB available)	4 GB	
Database Server for Financial Management	12 GB minimum	4 GB minimum	
Planning	32 GB (10 GB available)	4 GB	
Performance Scorecard	2 GB recommended (1 GB minimum)	1 GB[1]	
Strategic Finance Server	250 MB[2]	2 GB minimum	

[1]1 GB includes Performance Scorecard and Alerter servers.

[2]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.

Required Hyperion Software

See the other sections in this chapter to check requirements for other required Hyperion products.

Required Software	Required For	Notes
Essbase (Essbase Server and Administration Services components)	• Planning • Performance Scorecard Server—for custom reporting through cube production	
Shared Services	• Financial Management • Planning • Performance Scorecard (unless using Performance Scorecard in native authentication mode) • Strategic Finance—Shared Services is required if importing and exporting with Financial Management, Planning, or Essbase, or if using a security provider other than NTLM, such as LDAP	See "Shared Services Requirements" on page 16.
Workspace	• Financial Management • Planning	

Required Third-Party Software

Third-Party Software	Notes
Java tools—Java Cryptology Extension 1.2.2	Required only for Performance Scorecard Server
MDAC 2.8 (for Oracle and SQL Server)	Required only for Strategic Finance
PKZip 8.0 (command-line interface) for database backup	Strategic Finance

Repository Databases

Products that require a data repository:

- Financial Management
- Performance Scorecard
- Planning
- Shared Services

Relational Data Repositories	Notes
IBM DB2 9.1	
• Microsoft SQL Server 2008 • Microsoft SQL Server 2005 SP1 • Microsoft SQL Server 2000 SP3a	By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.

Relational Data Repositories	Notes
Oracle[1]: ● Oracle 11*g*[2] ● Oracle 11g (11.1 and 11.2) ● Oracle 10*g* Release 2 (10.2.0.2) ● Oracle 10*g* (10.1.0.5) ● Oracle 9*i* (9.2.0.5	● For all supported versions of Oracle, the Oracle OLE provider and Oracle database server must be the same version.

[1]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.

[2]Oracle 11*g* requires Oracle Hyperion Configuration Utility Service Fix 9.3.1.0.01.

Java Application Servers and Web Servers

If an application contains more than 500 users and 10,000 measures, deploy to a Java application server cluster for increased scalability.

A Java application server is required only for:

- Planning
- Performance Scorecard
- Shared Services

Note: Only 32-bit application servers are supported.

Java Application Servers	Notes
● Apache Tomcat 5.0.28[1]	
● BEA WebLogic 9.2[2] ● BEA WebLogic 9.1 ● BEA WebLogic 8.1.6	Also includes support for WebLogic Express.
● IBM WebSphere 6.1.0.5[3] ● IBM WebSphere 6.0.2.11	
● Oracle 10*g* Release 3 (10.1.3.1.0) ● Oracle 10*g* Release 2 (10.1.2.0.2)	

[1]Apache Tomcat is automatically installed on all platforms. For deployments that require high availability or failover, Hyperion recommends using a commercially supported Java application server that supports high availability and failover.

[2]When manually deploying Shared Services to WebLogic 9.2, you must set the `<enfore-valid-basic-auth-credentials>` tag to `false` in the `<DOMAIN_LOCATION>/<DOMAIN_NAME>/config/config.xml` file.

[3]WebSphere Express, ND, and XD Editions are supported for each supported version of WebSphere; ND and XD are supported only via manual deployment.

The following products require a Web server:

- Financial Management

- Planning

Web Server	Notes
Windows: • Microsoft IIS 6.0 (on Windows 2003 SP1) • Microsoft IIS 5.0 (on Windows Server 2000 SP4) • Apache Server 2.0.52	• Financial Management—Uses only IIS • Planning—Can use an internal WebLogic or WebSphere Web server
UNIX: Apache Server 2.0.52	Not supported for: • Financial Management

Data Management

This section lists the requirements for:

- FDM
- Data Relationship Management
- Shared Services

Server Requirements

- "Server OS/Processor " on page 39
- "Disk Space/RAM" on page 40
- "Required Hyperion Software" on page 40
- "Required Third-Party Software " on page 41
- "Repository Databases " on page 41

Server OS/Processor

Operating System	Platform	Processor	Notes
Microsoft Windows: • Windows 2003 SP1 • Windows 2000 Server SP4[1]	32-bit	x86	
• Windows 2003 SP1 • Windows 2000 Server SP4	32-bit	Pentium 4	Supported by: • FDM Web Server—per 75 concurrent users

Operating System	Platform	Processor	Notes
• Windows 2003 SP1 • Windows 2000 Server SP4	32–bit	Dual Pentium 4.2 GHz	Supported by: • FDM Application Server—per 75 concurrent users • Data Relationship Management—Application Server • Data Relationship Management—Database Server
• Windows 2003 SP1 • Windows 2000 Server SP4	32–bit	Quad Pentium 4	Supported by only FDM Database Server
Oracle Enterprise Linux 4[2]	32-bit		

[1]FDM—FDM Web Server runs on Windows 2000 server only if no other .NET applications are installed. Not recommended.

[2]Oracle Enterprise Linux 4—for supporting browser-based clients only.

Note: FDM cannot be installed on a machine that hosts either WebSphere application server or WebLogic application server (for use with other products — FDM does not use a Java application server).

Disk Space/RAM

Component	Disk Space	RAM	Notes
FDM Database Server	• 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[1]	2 GB minimum	2 GB	
Data Relationship Management-Application Server	100 MB	4 GB	

[1]If using SQL Server, run it in mixed authentication mode, not Windows-only mode.

Required Hyperion Software

Required Hyperion Software	Notes
Shared Services	Required for: • Data Relationship Management-Application Server—For external authentication only See "Shared Services Requirements" on page 16.

Required Hyperion Software	Notes
Dependent on the Hyperion products that are deployed, one or more products: ● Essbase ● Financial Management ● Oracle's Hyperion® Enterprise® ● Planning	For FDM, the required components: ● Workbench Client ● Application Server

Required Third-Party Software

Requirement	Notes
● Microsoft MDAC 2.6 or later—MDAC is installed by FDM. ● Excel 2000 or later	Required only for FDM Application Server
● Microsoft IIS 6.0 (on Windows Server 2003) ● Microsoft IIS 5.0 (on Windows 2000 SP4) ● Microsoft MDAC 2.6 or later—MDAC is installed by FDM.	Required only for FDM Web Server
● **Optional**—Additional client software, such as Oracle SQL*Plus for Oracle 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: ❍ Microsoft SQL Server client drivers (DLLs)[1] ❍ Oracle client drivers (DLLs) ● Microsoft IIS 5.0 or later ● Microsoft .NET Framework	Required only for Data Relationship Management - Application Server
For bridging to IIS, a vendor-supplied application server connector: ● (Windows only) Apache Tomcat connector ● WebLogic connector ● IBM HTTP server for WebSphere	Required only for Oracle's Hyperion® Translation Manager

[1]If using SQL Server, client software is not required if MDAC 2.7 or later is installed. If MDAC 2.7 is installed on the application server, the installation program automatically updates it to the latest version. If MDAC is not installed, or if the installed version is earlier than 2.7, you must manually install MDAC.

Repository Databases

A repository database is required only for:

- FDM
- Data Relationship Management
- Shared Services

Relational Data Repositories	Notes
• IBM DB2 9.1	Not supported by FDM or Data Relationship Management
• Microsoft SQL Server 2008 • Microsoft SQL Server 2005 SP1 • Microsoft SQL Server 2000 SP3a	Microsoft SQL Server 2000 SP3a is not supported by FDM. By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.
Oracle[1]: • Oracle 11*g* (11.1 and 11.2) [2] • Oracle 10*g* Release 2 (10.2.0.2) • Oracle 10*g* (10.1.0.5) • Oracle 9*i* (9.2.0.5)	

[1]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.

[2]Oracle 11*g* requires Oracle Hyperion Configuration Utility Service Fix 9.3.1.0.01.

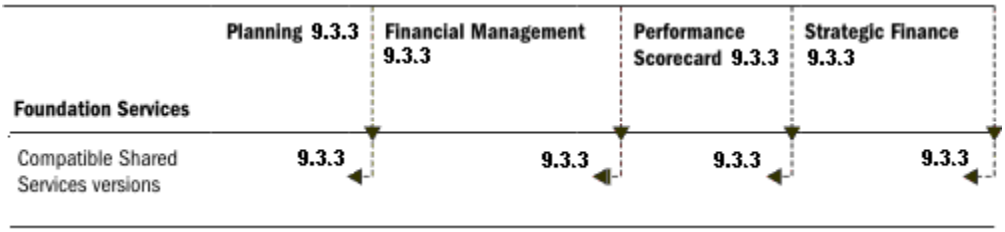
4 Release Compatibility

In This Chapter

How to Read the Tables in This Chapter 43
Shared Services Release Compatibility 43
Essbase - System 9 Release Compatibility 44
Reporting and Analysis Release Compatibility 45
Financial Performance Management Applications Release Compatibility 47
Data Management Release Compatibility 49

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 other Hyperion products that are compatible with the product named at the head of the column.



For example, Planning 9.3.3 is compatible with Shared Services version 9.3.3.

Shared Services Release Compatibility

Release 9.3.3 Hyperion products are not compatible with previous versions of Shared Services. Therefore, if you upgrade any Hyperion product to Release 9.3.3, you must upgrade Shared Services to Release 9.3.3.

Note: If you are using Performance Management Architect, see "Using Release 9.3.3 Products With Performance Management Architect" on page 97.

Note: You can use Smart View 9.3.3 with the following 9.3.1 products: Essbase, Financial Management, and Planning.

Essbase - System 9 Release Compatibility

Table 3 Essbase - System 9 Release Compatibility

	Essbase 9.3.3	Essbase 9.3.3 (if using Performance Management Architect 11.1.1.3)[1]	Administration Services 9.3.3	Integration Services 9.3.3	Provider Services 9.3.3
Foundation Services					
Compatible Shared Services versions	9.3.3	11.1.1.3	9.3.3	NA	9.3.3
Compatible Smart View versions	9.3.3	9.3.3	NA	9.3.3	9.3.3
Essbase - System 9					
Compatible Essbase versions	NA	NA	9.3.3	9.3.3	9.3.3
Compatible Administration Services versions	9.3.3	9.3.3	9.3.3	9.3.3	9.3.3
Compatible Provider Services versions	9.3.3	9.3.3	9.3.3	NA	NA
Compatible Integration Services versions	9.3.3	9.3.3	NA	NA	NA
Reporting and Analysis					
Compatible Financial Reporting versions	9.3.3	11.1.1.3	NA	NA	NA
Compatible SQR Production Reporting versions	9.3.3	11.1.1.3	NA	NA	NA
Compatible Interactive Reporting versions	9.3.3	11.1.1.3	NA	NA	NA
Compatible Web Analysis versions	9.3.3	11.1.1.3	NA	NA	NA
Compatible Oracle's Hyperion® Application Builder J2EE versions	NA	NA	NA	NA	NA
Financial Performance Management Applications					
Compatible Planning versions	9.3.3	9.3.3	9.3.3	NA	NA
Compatible Financial Management versions	9.3.3	9.3.3	NA	NA	NA

	Essbase 9.3.3	Essbase 9.3.3 (if using Performance Management Architect 11.1.1.3)[1]	Administration Services 9.3.3	Integration Services 9.3.3	Provider Services 9.3.3
Compatible Performance Scorecard versions	9.3.3	9.3.3	NA	NA	NA
Compatible Strategic Finance versions	NA	NA	NA	NA	NA
Financial Close Management	NA	NA	NA	NA	NA
Disclosure Management	11.1.2	11.1.2	NA	NA	NA
Data Management					
Compatible Data Relationship Management versions	9.3.3 (through flat files)	9.3.3 (through flat files)	NA	NA	NA
Compatible FDM versions	9.3.3	9.3.3	NA	NA	NA
Compatible Data Integration Management versions	9.3.1	9.3.1	NA	NA	NA
Other Products					
Compatible Essbase Analytics Link versions	11.1.1.3.501	NA	NA	NA	NA

[1]If you are using Internet Explorer 8, use EPM Workspace service fix 11.1.1.3.15 (patch 9314073) or later.

Reporting and Analysis Release Compatibility

Table 4 Reporting and Analysis Release Compatibility

	Interactive Reporting 9.3.3	Financial Reporting 9.3.3	SQR Production Reporting 9.3.3	Web Analysis 9.3.3
Foundation Services				
Compatible Shared Services versions[1]	9.3.3	9.3.3	9.3.3	9.3.3
Compatible Smart View versions	9.3.3	9.3.3	9.3.3	9.3.3
Essbase - System 9				
Compatible Essbase versions	9.3.3	9.3.3	9.3.3	9.3.3
Compatible Administration Services versions	NA	NA	NA	NA

	Interactive Reporting 9.3.3	Financial Reporting 9. 3.3	SQR Production Reporting 9.3.3	Web Analysis 9.3.3
Compatible Provider Services versions	NA	9.3.3	NA	9.3.3
Compatible Integration Services versions	NA	9.3.3	9.3.3	9.3.3
Compatible Application Builder J2EE versions	NA	NA	NA	NA
Financial Performance Management Applications				
Compatible Planning versions	NA	9.3.3	NA	9.3.3
Compatible Financial Management versions	NA	9.3.3	NA	9.3.3
Compatible Performance Scorecard versions	NA	NA	NA	NA
Compatible Strategic Finance versions	NA	NA	NA	NA
Financial Close Management	NA	11.1.2.0.1	NA	NA
Disclosure Management	NA	NA	NA	NA
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

[1]Shared Services is not needed for standalone products

Financial Performance Management Applications Release Compatibility

Table 5 Financial Performance Management Applications Release Compatibility

	Planning 9.3.3[1]	**Planning 9.3.3 (if using Performance Management Architect 11.1.1.3)**[23]	**Financial Management 9.3.3**	**Financial Management 9.3.3 (if using Performance Management Architect 11.1.1.3**[4]	**Performance Scorecard 9.3.3**	**Strategic Finance 9.3.3**
Foundation Services						
Compatible Shared Services versions	9.3.3	11.1.1.3	9.3.3	11.1.1.3	9.3.3	9.3.3
Compatible Smart View versions	9.3.3	9.3.3	9.3.3 11.1.2 (if using with Disclosure Management)	9.3.3 11.1.2 (if using with Disclosure Management)	NA	NA
Essbase - System 9						
Compatible Essbase versions	9.3.3	9.3.3	9.3.3	9.3.3	9.3.3	9.3.3
Compatible Administration Services versions	9.3.3	9.3.3	9.3.3	9.3.3	NA	NA
Compatible Provider Services versions	9.3.3	9.3.3	NA	NA	NA	NA
Compatible Integration Services versions	9.3.3	9.3.3	NA	NA	9.3.3	NA
Reporting and Analysis						
Compatible Financial Reporting versions	9.3.3 11.1.1.3 (required if using Performance Management Architect) 11.1.2	9.3.3 11.1.1.3 (required if usingPerformance Management Architect) 11.1.2	9.3.3 11.1.1.3 (required if using Performance Management Architect) 11.1.2	9.3.3 11.1.1.3 (required if using Performance Management Architect) 11.1.2	NA	NA

	Planning 9.3.3[1]	Planning 9.3.3 (if using Performance Management Architect 11.1.1.3)[23]	Financial Management 9.3.3	Financial Management 9.3.3 (if using Performance Management Architect 11.1.1.3[4]	Performance Scorecard 9.3.3	Strategic Finance 9.3.3
Compatible Oracle's Hyperion® SQR® Production Reporting – System 9 versions	NA	NA	NA	NA	NA	NA
Compatible Interactive Reporting versions	NA	NA	NA	NA	Through IR Smartcuts	NA
Compatible Web Analysis versions	9.3.3.	9.3.3.	9.3.3.	9.3.3.	Through Extended Analytics	NA
Compatible Oracle's Hyperion® Application Builder J2EE versions	NA	NA	NA	NA	NA	NA
Financial Performance Management Applications						
Compatible Planning versions	NA	NA	9.3.3	9.3.3	9.3.3	The version deployed with Essbase
Compatible Financial Management versions	9.3.3	9.3.3	NA	NA	9.3.3	9.3.3
Compatible Performance Scorecard versions	NA	NA	9.3.3	9.3.3	NA	NA
Compatible Strategic Finance versions	NA	NA	9.3.3	9.3.3	NA	NA
Financial Close Management	NA	NA	11.1.2.0.1	11.1.2.0.1	NA	NA
Disclosure Management	11.1.2	11.1.2	11.1.2	11.1.2	NA	NA

	Planning 9.3.3[1]	Planning 9.3.3 (if using Performance Management Architect 11.1.1.3)[2][3]	Financial Management 9.3.3	Financial Management 9.3.3 (if using Performance Management Architect 11.1.1.3[4]	Performance Scorecard 9.3.3	Strategic Finance 9.3.3
Data Management						
Compatible Data Relationship Management versions	All versions through flat files	All versions through flat files	All versions through flat files	All versions through flat files	NA	NA
Compatible FDM versions	The version deployed with Essbase	The version deployed with Essbase	9.3.3	9.3.3	NA	NA
Compatible Data Integration Management versions	9.3.1	9.3.1	9.3.1	9.3.1	NA	NA
Other Products						
Compatible Essbase Analytics Link versions	NA	NA	11.1.1.3.501	11.1.1.3.501	NA	NA

[1]Includes Oracle's Hyperion® Workforce Planning and Capital Expense Planning

[2]If you are using Internet Explorer 8, use EPM Workspace service fix 11.1.1.3.15 (patch 9314073) or later.

[3]Includes Oracle's Hyperion® Workforce Planning and Capital Expense Planning

[4]If you are using Internet Explorer 8, use EPM Workspace service fix 11.1.1.3.15 (patch 9314073) or later.

Data Management Release Compatibility

Table 6 Data Management Release Compatibility

	Data Relationship Management 9.3.3	FDM 9.3.3
Foundation Services		
Compatible Shared Services versions	9.3.3	NA
Compatible Smart View versions	NA	NA
Essbase - System 9		
Compatible Essbase versions	All versions through flat files	9.3.3 11.1.x (for loading data only; no drill-back)
Compatible Administration Services versions	All versions through flat files	NA
Compatible Provider Services versions	NA	NA

	Data Relationship Management 9.3.3	FDM 9.3.3
Compatible Integration Services versions	NA	NA
Financial Performance Management Applications		
Compatible Planning versions	All versions through flat files	The version deployed with Essbase
Compatible Financial Management versions	All versions through flat files	9.3.3 11.1.x (for loading data only; no drill-back)
Compatible Performance Scorecard versions	NA	NA
Compatible Strategic Finance versions	NA	All versions through flat files
Financial Close Management	NA	11.1.2.0.1
Disclosure Management	NA	NA

5 Ports

In This Chapter

About Default Ports 51
Shared Services Ports 51
Essbase - System 9 Ports 52
Reporting and Analysis Ports 55
Financial Performance Management Applications Ports 60
Data Management Ports 62

About Default Ports

During Hyperion product deployments, default port numbers for application servers are automatically populated. During configuration, you can change the default numbers. Each port number must be unique. If an error message similar to "port already in use" or "bind error" is displayed, a port number conflict might exist.

If the default port number is not changed, the software is configured with the default values.

Shared Services Ports

Table 7 Shared Services Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	58080	Hyperion Configuration Utility
SSL listen port	58443	Application server administration console (configure manually)
Shutdown Port for Apache Tomcat	58081	Application server administration console (configure manually)
AJP connector port	58082	Application server administration console (configure manually)

Table 8 Shared Services Default Service Ports

Service	Default Port Number	Where Configurable
Hyperion Remote Authentication Module	58000	Oracle's Hyperion® Remote Authentication Module™ installation program

Service	Default Port Number	Where Configurable
	Additional dynamic port (1)	Not configurable

OpenLDAP	58089	• UNIX: `<HSS_HOME>/openLDAP/startOpenLDAP.sh`
		• Windows: Run `slapd -d 1 -f slapd.conf -h ldap://hostname:portnumber`
		• UNIX and Windows: `CSS.xml`:
		`<hub location="http://localhost:HSS Port">`
		`<dirPort>openLDAP Port</dirPort>`
		`</hub>`

Changing the OpenLDAP Port

Use this procedure if you want to run OpenLDAP on a non-default port. You cannot update the OpenLDAP port on the User Directories Management page in Shared Services.

➤ To change the OpenLDAP port:

1. **Go to the `<HYPERION_HOME>/deployments/SharedServices9/AppServer/config` directory. For example, if Shared Services is deployed on Tomcat, this directory, on Windows, could be `C:\Hyperion\deployments\Tomcat5\SharedServices9\config`**
2. **Edit the `CSS.xml` file and update the `dirPort` from the default 58089 to the custom port and save it.**
3. **Do one of the following:**

   For Windows, change the OpenLDAP port in the Windows registry:

   a. Go into `regedit`.

   b. Go to `HKEY_LOCAL_MACHINE\SOFTWARE\OpenLDAP\Parameters` and change the **Urls string value** from `ldap://:58089` to `ldap://:<custom port>`

   For UNIX, change the OpenLDAP port in the start script:

   a. Search for `startOpenLDAP.sh` under the *<HYPERION_HOME>* directory.

   b. Edit the file by replacing the existing port (58089) with the custom port. Then save the changes.
4. **Restart OpenLDAP and Shared Services.**
5. **Restart all other System 9 products.**

Essbase - System 9 Ports

- "Essbase Ports" on page 53

- "Administration Services Ports" on page 53
- "Provider Services Ports" on page 54
- "Smart Search Ports" on page 55

Essbase Ports

Table 9 Essbase Default Service Ports

Service	Default Port Number	Where Configurable
Essbase Agent	1423	• Hyperion Configuration Utility • Essbase configuration file (*ARBORPATH*\bin\Essbase.cfg) Modify the file to include AgentPort. For instructions, see the *Essbase Technical Reference*, "Essbase.cfg Configuration Settings."
Essbase server applications (ESSSVR)	32768–33768 (two ports per process)	Essbase configuration file (*ARBORPATH*\bin\Essbase.cfg) To limit the range and set the increment for these ports, modify the file to include these settings: ServerPortBegin, ServerPortEnd, PortInc For instructions, see the *Essbase Technical Reference*, "Essbase.cfg Configuration Settings."
Integration Services Server	3388	<*AIS_HOME*>/bin/ais.cfg Add -Pportnumber

Administration Services Ports

Table 10 Administration Services Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	10080	• Hyperion Configuration Utility • Default Tomcat deployment: <*aas_home*>/deployments/tomcat/5.0.2.8/conf/server.xml Parameter: Connector port • Deployed Tomcat deployment (via Hyperion Configuration Utility): <*Hyperion_Home*>/deployments/<*AppServNameAndVersion*>/aas/conf/server.xml Parameter: Connector port • WebLogic and WebSphere: Application server administration console

Port Type	Default Port Number	Where Configurable
SSL listen port	10090	• Default Tomcat deployment: `<aas_home>/deployments/tomcat/5.0.28/conf/server.xml` Parameter: `Connector port` • Deployed Tomcat deployment (via Hyperion Configuration Utility): `<Hyperion_Home>/deployments/<AppServNameAndVersion>/aas/conf/server.xml` Parameter: `Connector port` • WebLogic and WebSphere: Application server administration console
Shutdown port for Apache Tomcat	10081 For default Tomcat deployment only: 10005	• Deployed Tomcat deployment (via Hyperion Configuration Utility): `<Hyperion_Home>/deployments/<AppServNameAndVersion>/aas/conf/server.xml` Parameter: `Connector port` • Default Tomcat deployment: `<aas_home>/deployments/tomcat/5.0.28/conf/server.xml` Parameter: `Connector port` • WebLogic and WebSphere: Application server administration console
AJP connector port	10082 For default Tomcat deployment only: NA	• Deployed Tomcat deployment (via Hyperion Configuration Utility): `<Hyperion_Home>/deployments/<AppServNameAndVersion>/aas/conf/server.xml` Parameter: `Connector port` • Default Tomcat deployment: NA • WebLogic and WebSphere: Application server administration console

Provider Services Ports

Table 11 Provider Services Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	13080	• Hyperion Configuration Utility • Default Tomcat deployment: `<aps_home>/deployments/tomcat/5.0.28/conf/server.xml` Parameter: `Connector port` • Deployed Tomcat deployment (via Hyperion Configuration Utility): `<Hyperion_Home>/deployments/<AppServNameAndVersion>/aps/conf/server.xml` Parameter: `Connector port` • WebLogic and WebSphere: Application server administration console

Port Type	Default Port Number	Where Configurable
SSL listen port	13090	• Default Tomcat deployment: `<aps_home>/deployments/tomcat/5.0.28/conf/server.xml` Parameter: `Connector port` • Deployed Tomcat deployment (via Hyperion Configuration Utility): `<Hyperion_Home>/deployments/<AppServNameAndVersion>/aps/conf/server.xml` Parameter: `Connector port` • WebLogic and WebSphere: Application server administration console
Shutdown port for Apache Tomcat	13081 For default Tomcat deployment only: 13005	• Deployed Tomcat deployment (via Hyperion Configuration Utility): `<Hyperion_Home>/deployments/<AppServNameAndVersion>/aps/conf/server.xml` Parameter: `Connector port` • Default Tomcat deployment: `<aps_home>/deployments/tomcat/5.0.28/conf/server.xml` Parameter: `Connector port` • WebLogic and WebSphere: Application server administration console
AJP connector port	13082 For default Tomcat deployment only: NA	• Deployed Tomcat deployment (via Hyperion Configuration Utility): `<Hyperion_Home>/deployments/<AppServNameAndVersion>/aps/conf/server.xml` Parameter: `Connector port` • Default Tomcat deployment: NA • WebLogic and WebSphere: Application server administration console

Smart Search Ports

Table 12 Smart Search Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	16080	Default Tomcat deployment: `<Hyperion_Home>/deployments/tomcat5/conf/server.xml` Parameter: `Connector port`
SSL listen port	NA	NA
Shutdown port for Apache Tomcat	16081	Default Tomcat deployment: `<Hyperion_Home>/deployments/tomcat5/conf/server.xml` Parameter: `Server port`
AJP connector port	NA	NA

Reporting and Analysis Ports

- "Foundation Ports" on page 56

- "Financial Reporting Ports" on page 57
- "Interactive Reporting Ports" on page 58
- "Web Analysis Ports" on page 58
- "Workspace Ports" on page 59
- "Application Builder J2EE Ports" on page 59
- "Application Builder.NET Ports" on page 60

Foundation Ports

Table 13 Reporting and Analysis Default Service Ports

Service	Default Port Number	Where Configurable
Foundation	6790 – 6810	See below for detail on each port.

Global Services Manager (GSM)	6800	• Hyperion Configuration Utility
		• `<BIPLUS_HOME>/common/config/server.xml`
		`<host>machine.domain</host>`
		`<port>portNumber</port>`

Core Service	6801	
Name Service	6798	• Hyperion Configuration Utility • Remote Service Configurator. See the *Hyperion Workspace Administrator's Guide*. • `<BIPLUS_HOME>/common/config/config.dat` Parameter: `Port` See the *Hyperion Workspace Administrator's Guide*.
• Service Broker • Job Service • Event Service • Repository Service	• 6797 • 6796 • 6794 • 6795	Remote Service Configurator See the *Hyperion Workspace Administrator's Guide*.

Table 14 Reporting and Analysis Web Server Port

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

Financial Reporting Ports

Table 15 Financial Reporting Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	8200	Hyperion Configuration Utility
SSL listen port	NA	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	8201	Application server administration console (configure manually). **Note:** The port number depends on the listen port (listen port + 1).
AJP connector port	8202	<*HYPERION_HOME*>/common/httpserver/Apache/2.0.52/conf/HYSLWorkers.properties worker.Financial_Reporting.host=*hostname*.*company*.com worker.Financial_Reporting.port=*portNumber* worker.Financial_Reporting.type=ajp13 **Note:** The port number depends on the listen port (listen port + 2).

Table 16 Financial Reporting Default Service Ports

Service	Default Port Number	Where Configurable
Financial Reporting Report Service	Dynamic (2)	<*BIPLUS_HOME*>/lib/fr_repserver.properties Parameters: HRRepSvrPort1, HRRepSvrPort2
Financial Reporting Scheduler Service	Dynamic	<*BIPLUS_HOME*>/lib/fr_scheduler.properties Parameter: HRSchdSvrPort
Financial Reporting Print Service	Dynamic	<*BIPLUS_HOME*>/lib/fr_printserver.properties Parameter: HRPrintSvrPort
Financial Reporting Communication Service	8299	<*BIPLUS_HOME*>/lib/fr_global.properties Parameter: RMIPort
	Additional dynamic port (1)	Not configurable
Remote ADM Server port for Planning datasource access	Dynamic	*HYPERION_HOME*/common/ADM/*VERSION*/lib/ADM.properties file on the Report Server machine Parameter: ADM_RMI_SERVER_PORT

Interactive Reporting Ports

Table 17 Interactive Reporting Default Service Ports

Service	Default Port Number	Where Configurable
Data Access Service (DAS)	6811, 6812	<*BIPLUS_HOME*>/common/config/irmconfig.xml Default Ports = *portNumber*,*portNumber*
Interactive Reporting Service	6813, 6814	<*BIPLUS_HOME*>/common/config/irmconfig.xml Default Ports = *portNumber*,*portNumber*
Job Service	6815	<*BIPLUS_HOME*>/common/config/irmconfig.xml Default Ports = *portNumber*
Log Service	6810	<*BIPLUS_HOME*>/common/config/irmconfig.xml Default Ports = *portNumber*

Web Analysis Ports

Table 18 Web Analysis Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	16000	Hyperion Configuration Utility
Additional listen ports (2)	Dynamic	Not configurable
SSL listen port	NA	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	16001	Application server administration console (configure manually). **Note:** The port number depends on the listen port (listen port + 1).
AJP connector port	16002	<*HYPERION_HOME*>/common/httpserver/Apache/2.0.52/conf/HYSLWorkers.properties worker.Web_Analysis.host=*hostname.company*.com worker.Web_Analysis.port=*portNumber* worker.Web_Analysis.type=ajp13 **Note:** The port number depends on the listen port (listen port + 2).

Workspace Ports

Table 19 Workspace Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	45000	Hyperion Configuration Utility
Additional listen port (1)	Dynamic	Not configurable
SSL listen port	NA	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	45001	<*BIPLUS_HOME*>/AppServer/InstalledApps/Tomcat/5.0.28/Workspace/conf/server.xml <Server port="*portNumber*" shutdown="SHUTDOWN"> **Note:** The port number depends on the listen port (listen port + 1).
AJP connector port	45002	<*HYPERION_HOME*>/common/httpserver/Apache/2.0.59/conf/HYSLWorkers.properties worker.Workspace.host=*hostname.company*.com worker.Workspace.port=*portNumber* worker.Workspace.type=ajp13 **Note:** The port number depends on the listen port (listen port + 2).

Application Builder J2EE Ports

Table 20 Application Builder J2EE Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	22080	Application server administration console (configure manually)
SSL listen port	22090	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	22005	<HAB_INSTALL_DIR>/AppServer/InstalledApps/Tomcat/5.0.28/ApplicationBuilder/conf/server.xml <Server port="*portNumber*" shutdown="SHUTDOWN">
AJP connector port	NA	NA

Application Builder.NET Ports

Table 21 Application Builder.NET Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	22080	Hyperion Configuration Utility
SSL listen port	22082	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	22081	Application server administration console (configure manually)
AJP connector port	NA	NA

Financial Performance Management Applications Ports

- "Financial Management Ports" on page 60
- "Performance Scorecard Ports" on page 61
- "Planning Ports" on page 61
- "Strategic Finance Ports" on page 62

Financial Management Ports

Table 22 Financial Management Default Service Port

Service	Default Port Number	Where Configurable
Financial Management 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 23 Financial Management Web Server Port

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.

Performance Scorecard Ports

Table 24 Performance Scorecard Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	18080	• Hyperion Configuration Utility • Application server administration console (configure manually)
SSL listen port	NA	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	18081	• Hyperion Configuration Utility • Application server administration console (configure manually) **Note:** The port number depends on the listen port (listen port + 1).
AJP connector port	18082	Hyperion Configuration Utility **Note:** The port number depends on the listen port (listen port + 2).

Table 25 Performance Scorecard Alerter Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	18090	• Hyperion Configuration Utility • Application server administration console
SSL listen port	NA	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	18091	• Hyperion Configuration Utility • Application server administration console (configure manually) **Note:** The port number depends on the listen port (listen port + 1).
AJP connector port	18092	Hyperion Configuration Utility **Note:** The port number depends on the listen port (listen port + 2).

Planning Ports

Table 26 Planning Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	8300	Hyperion Configuration Utility
Additional listen port (1)	Dynamic	Not configurable
SSL listen port	8303	Application server administration console (configure manually)
Shutdown port for Apache Tomcat	8301	Application server administration console (configure manually)
AJP connector port	8302	Application server administration console (configure manually)

Table 27 Planning Default Service Port

Service	Default Port Number	Where Configurable
Planning RMI Server	11333	<*HYPERION_HOME*>/common/RMI/1.0.0/HyperionRMI_Port.properties Parameter: registryPort **Note:** If you change the port, you must run uninstallHyperionNTServiceRMI.cmd and then run installHyperionNTServiceRMI.cmd.

Strategic Finance Ports

Table 28 Strategic Finance Default Service Port

Service	Default Port Number	Where Configurable
Strategic Finance Server	7750	Strategic Finance administration tool The default port value is in the registry. The key is in HKEY_LOCAL_MACHINE\Software\Hyperion Solutions\HSFService\RPCPort. The value is a string item that contains the port number as text. Each client program includes a registry item (accessible with the Connect dialog box) to set port numbers for each contacted machine. The key for a client program connection to a server is HKEY_CURRENT_USER\Software\Hyperion Solutions\Hyperion Strategic Finance Servers\<*machinename*>\NetworkPort. It is also a string that contains a numeric value.

Data Management Ports

- "FDM Ports" on page 62
- "Data Relationship Management Ports" on page 63

FDM Ports

Table 29 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://support.microsoft.com. Search for "restrict DCOM port."

Service	Default Port Number	Where Configurable
File sharing	137–139, 445	Controlled by the operating system. Enable file sharing between all WebLink application servers and the data server and set port numbers: ● 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."

Table 30 FDM Web Server Port

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 31 Data Relationship Management Default Service Port

Service	Default Port Number	Where Configurable
Data Relationship Management	135 plus ephemeral high-range ports (1024–65536)	● `config.xml` using the Data Relationship Management Console ● 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."

Table 32 Data Relationship Management Web Server Ports

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

6 Upgrading Sequence

In This Chapter

Upgrading Sequence and Tasks 65
Prerequisite Tasks for All Products 66
Upgrading Shared Services 66
Upgrading Essbase - System 9 67
Upgrading Planning 70
Upgrading Financial Management 72
Upgrading Performance Scorecard 72
Reporting and Analysis Tasks 73
Strategic Finance Tasks 74
Data Relationship Management Tasks 74
FDM Tasks 75

Upgrading Sequence and Tasks

Hyperion recommends that you install and configure products in the documented order. This section also provides a high-level description of tasks to perform for upgrading to Release 9.3.3.

For detailed upgrading instructions for each product, see the individual product Release 9.3.3 Readmes. If you need more detailed instructions for installing or configuring, you can also refer to the Release 9.3.1.x Installation Guides for the relevant product(s).

Before upgrading products, see the list of required Hyperion software in Chapter 3, "System Requirements" for that product to determine the parts of the sequence that you should follow.

Caution! If you are using Performance Management Architect 9.3.1 in your environment, do not follow this sequence. You must upgrade certain components in your environment to Release 11.1.1.3. See "Using Release 9.3.3 Products With Performance Management Architect" on page 97.

Caution! If you are using Release 11.1.2 Disclosure Management or Financial Close Management in your environment, see "Using Release 9.3.3 Products with Financial Close Management Release 11.1.2" on page 106"Using Release 9.3.3 Products With Disclosure Management 11.1.2" on page 103.

Prerequisite Tasks for All Products

TASK	NOTES
Ensure that you meet all system requirements.	Chapter 3, "System Requirements."
Shut down all Hyperion System 9 products and processes.	

Upgrading Shared Services

Almost all Hyperion System 9 products use Shared Services. Exceptions are FDM which does not use Shared Services in this release and Data Relationship Management uses Shared Services only for external authentication.

TASK	NOTES
Back up your existing Native Directory and Shared Services repository.	See Appendix D, "Shared Services Backup and Recovery" in the 9.3.1 *Hyperion Shared Services Installation Guide for Windows* or *Hyperion Shared Services Installation Guide for UNIX*.
Install Shared Services 9.3.3	
1. Navigate to the directory where you downloaded the product installation files. 2. Run the `EXE` or `BIN` file. 3. Your existing installation will be detected, and you will be prompted to upgrade. 4. Exit without launching the Configuration Utility.	See the *Hyperion Shared Services Release 9.3.3 Readme* or if you need further help installing, see "Installing Shared Services" in the 9.3.1 *Hyperion Shared Services Installation Guide*
Perform Web Application Server Specific Tasks	*Hyperion Shared Services Release 9.3.3 Readme*
Configure Shared Services	
1. Start Hyperion Configuration Utility. 2. Perform these tasks: a. Configure the database. **Note:** To ensure that the existing data in Shared Services is retained, select "Re-use the existing database". b. Automatically (recommended) or manually deploy to the application server. **Note:** Database configuration and application server deployment must be performed together the first time Shared Services is configured.	If you need further help, see "Configuring Shared Services" in the 9.3.1 *Hyperion Shared Services Installation Guide*
Stop Shared Services and OpenLDAP.	
Optional: Add custom authentication module Java archive to Shared Services class path.	*Hyperion Shared Services Release 9.3.3 Readme*
Verify Setting in the `CMS.properties` File.	*Hyperion Shared Services Release 9.3.3 Readme*

TASK	NOTES
Optional: Perform indexing LDAP step if you originally upgraded to 9.3.1 from an earlier version.	*Hyperion Shared Services Release 9.3.3 Readme*
Optional: For Tomcat deployments, rename web.xml.tomcat to web.xml.	*Hyperion Shared Services Release 9.3.3 Readme*
Update Shared Services file or script that sets custom parameters.	*Hyperion Shared Services Release 9.3.3 Readme*
Optional: Install Hyperion Remote Authentication Module (HRAM), if needed.	*Hyperion Shared Services Release 9.3.3 Readme*
Start Shared Services.	
Post Deployment Steps 1. Verify setting in the CMS.properties file. 2. Verify database user account limitations. 3. Reset OpenLDAP root parameters.	*Hyperion Shared Services Release 9.3.3 Readme*

Upgrading Essbase - System 9

Install Essbase - System 9 products in this order:

1. Essbase client
2. Essbase Server
3. Administration Services (includes Oracle's Hyperion® Business Rules and Oracle's Hyperion® Smart Search)
4. Integration Services
5. Provider Services and Smart View

Note: The Smart View installation program is distributed in the Provider Services installation image in the `<APS_INSTALL>/redist` folder. To install Smart View, you must run the Smart View executable separately from the Provider Services installation program. The Smart View installation program is also available from the Oracle® E-Delivery site. Smart View can be used to connect to Essbase as a data source only if Provider Services and Essbase are installed and running.

Note: To identify the Essbase - System 9 products that are required for other Hyperion products, see Chapter 3, "System Requirements."

TASK	NOTES
Back Up Release 9.3.1.x Do a complete, not incremental, backup of all Essbase files and applications before upgrading.	For details, see "Backup and Recovery" in the *Hyperion Essbase – System 9 Release 9.3.1.x Database Administrator's Guide*.
Install Essbase - System 9 Products	
You do not need to remove Essbase Release 9.3.1.x from the computer when upgrading to Release 9.3.3. 1. Navigate to the directory where you downloaded the product installation files. 2. Run the appropriate setup file.	If you need detailed instructions on installing, see the *Hyperion Essbase – System 9 Release 9.3.1 Installation Guide* for your platform.
Perform Post-Installation Steps ● Before starting Essbase, ensure that you have followed all the steps in the Shared Services Release 9.3.3 Readme. ❍ Pass the Java system property `-Dsun.net.inetaddr.ttl=0` to the JVM as an environment variable. ❍ Verify `CMS.properties` setting. ❍ If you are deploying Shared Services on Tomcat, perform additional steps. ❍ Stop and restart Shared Services. ❍ Start Essbase.	
OPTIONAL: If Essbase is not working properly, check that `ARBORPATH` is set to the Essbase default installation directory. **Note:** If you install Interactive Reporting after installing Essbase, the ARBORPATH location is changed to point to the Essbase run-time client. You must change the ARBORPATH location back to the Essbase default installation directory.	See the instructions in the *Hyperion Essbase Release 9.3.3 Readme.*

Upgrading Administration Services

TASK	NOTES
Back Up Release 9.3.1.x Do a complete, not incremental, backup of all Administration Services user files and objects before upgrading.	For details, see "Backup and Recovery" in the *Hyperion Essbase – System 9 Release 9.3.1.x Database Administrator's Guide*.
Stop Administration Server and Administration Services Console	
Install Administration Services	If you need detailed instructions on installing, see the *Hyperion Administration Services Release 9.3.1 Installation Guide* for your platform.

TASK	NOTES
Perform Post-Installation Steps ● Restore the `EASPATH/eas/storage` directory. ● Run the Configuration Utility to reconfigure your upgraded release. ● Before starting Administration Services, edit the custom parameters file to edit the `JAVA_OPTS` setting to include `- Dsun.net.inetaddr.ttl=0`. ● Start Administration Services. **Note:** If you upgrade Administration Services 9.3.1.x to Administration Services 9.3.3, the Oracle's Hyperion® Business Rules version number in the `HBRclient.properties` file may not be updated. To fix this, in the `HBRclient.properties` file, change the text `HBR_EAS_VERSION=9.3.1` to `HBR_EAS_VERSION=9.3.3`.	See the *Hyperion Administration Services Release 9.3.3 Readme.*

Upgrading Integration Services

TASK	NOTES
Shut down Integration Services Console and Integration Server	
Install Integration Services Release 9.3.3 ● Download and extract the installation files to a local drive. ● Run setup and complete the installation program.	For further instructions on how to install, see the *Hyperion Essbase Integration Services Release 9.3.1 Installation Guide* for the platform you are using.
Configure DSNs for ODBC Drivers ● If you are using DataDirect ODBC drivers, configure the DSN for your OLAP Metadata Catalog to point to the latest DataDirect driver. ● If you are using DataDirect ODBC drivers, configure the DSNs for your data sources to point to the latest DataDirect drivers.	See the *Hyperion Integration Services Release 9.3.3 Readme*.
Start Integration Server	
Test connectivity Test connectivity by starting Integration Services Console and connecting to your OLAP Metadata Catalog and a data source.	

Upgrading Provider Services

TASK	NOTES
Stop Provider Services if running.	
Back Up Files from Release 9.3.1.x 1. Make a backup copy of `essbase.properties`, located in *`APS_HOME`*`/bin/` 2. Make a backup copy of `domain.db` located in *`APS_HOME`*`/data/`	

TASK	NOTES
Install Provider Services 9.3.3	For further instructions on how to install, see the *Hyperion Provider Services Release 9.3.1.1 Installation Guide* for your platform.
Restore Files 1. Restore `essbase.properties` 2. Restore `domain.db`.	
Configure Provider Services Using the Configuration Utility ● Deploy to Application Server	For further instructions on how to install, see the *Hyperion Provider Services Release 9.3.1.1 Installation Guide* for your platform.

Upgrading Smart View

To upgrade Smart View in Release 9.3.3, you need to overwrite files from your previous version.

TASK	NOTES
Install Release 9.3.3 by overwriting the Release 9.3.1. x version.	For details, follow the installation procedures in the *Hyperion Smart View Release 9.3.1.x User' s Guide.*
If you are upgrading to Release 9.3.3, you must perform the deployment steps for data providers (Financial Management, Planning, Provider Services, and Reporting and Analysis)	For details, see the *Hyperion Smart View Release 9.3.3 Readme*.
Smart View client users need to perform an upgrade procedure.	For details, see the *Hyperion Smart View Release 9.3.3 Readme*

Upgrading Planning

The Planning sequence assumes that you installed and configured Shared Services, Essbase, and Administration Services.

TASK	NOTES
Log off Planning and stop the Web application server.	
Back Up Properties Files ● Back up the `PlanningSystemDB.properties` and `HBRServer.properties` files for your Web application server.	See the "Applying This Maintenance Release " section of the *Hyperion Planning Release 9. 3.3 Readme.*

TASK	NOTES
Rename Files ● Rename `.ear` file ● Rename the `planninginstall.jar file` ● Copy the new `planninginstall.jar` to `HYPERION_HOME/Planning/lib`	See the "Applying This Maintenance Release " section of the *Hyperion Planning Release 9. 3.3 Readme.*
Deploy Release 9.3.3 Planning 1. Copy the new `.ear` file to the deployment directory. An example in a Windows environment is: *HYPERION_HOME*`/Planning/AppServer/InstallableApps/Common/HyperionPlanning.ear`	See the "Applying This Maintenance Release " section of the *Hyperion Planning Release 9. 3.3 Readme.*
Configure 9.3.3 Planning using Configuration Utility 1. Configure the database by selecting the "Reuse Existing Tables" option. 2. Deploy to Application Server	If you need further instructions on using the Configuration Utility, see the *Hyperion Planning Installation Guide* for Release 9. 3.1.
Replace Files 1. Replace the existing `HSPJS.jar` and `hbrhpplugin.jar` files in two directories (`HYPERION_HOME/Planning/lib` and in `HYPERION_HOME/Common/ADM/Planning/9.3.1/lib`) with the new 9.3.3 versions of these files. 2. For your Web application server, restore the `PlanningSystemDB.properties` file and `HBRServer.properties` file that you already backed up.	
Perform Client Tasks ● Delete the browser cache and restart the browser for any client on which you need to open a Planning application. ● Reinstall Offline Planning.	See the "Applying This Maintenance Release " section of the Planning 9.3.3 Readme
Replace Planning DLL Files	See the "Applying This Maintenance Release " section of the Planning 9.3.3 Readme
Replace File (`CSS-9_3_1.jar`)	See the "Applying This Maintenance Release " section of the Planning 9.3.3 Readme
Update Essbase Runtime Client	See the "Applying This Maintenance Release " section of the Planning 9.3.3 Readme
Modify JVM Settings	See the "Applying This Maintenance Release " section of the Planning 9.3.3 Readme
Test Planning Logon	

Upgrading Financial Management

TASK	NOTES
Stop all Financial Management Services	
Stop Microsoft Internet Information Services	
Install Financial Management 1. Copy `hfm_9829066_windows.zip` to your local drive. This zip file contains: ● `HFM_9_3_3_0_0.exe` (installation file for this release) ● `HFM_9_3_1_3_HAL.exe` (installation file for Hyperion Application Link) ● `hfm_93300_readme.html` ● hfm_epu.pdf (Financial Management Equity Pickup Addendum) 2. Double-click `HFM_9_3_3_0_00.exe`	
Register the `AsyncCallback.dll` using the following command: `%SystemRoot%\Microsoft.NET\Framework\v2.0.50727\regasm.exe "%HYPERION_HOME%\FinancialManagement\Client\AsyncCallback.dll" /tlb /codebase`	*Hyperion Financial Management Release 9.3.3 Readme*
Start IIS.	
Restart Financial Management Services.	
Perform Post-Installation Steps ● **Optional:** If you are using SSL, complete the SSL procedures. See Oracle's Hyperion SSL Configuration Guide at: `http://download.oracle.com/docs/cd/E10530_01/doc/epm.931/hyp_ssl.pdf` ● **Optional:** If you are implementing a custom authentication module, complete the procedures to implement the Custom Authentication Module. See the Custom Authentication Module white paper at `http://www.oracle.com/technology/products/bi/resource-library.html` ● If you want to use the SMTP email alerting capability, and you are using an SMTP server that requires authentication, see "Setting Up Email Alerting with the SMTP Server" procedures in the *Hyperion Financial Management Release 9.3.3 Readme*.	*Hyperion Financial Management Release 9.3.3 Readme*

Upgrading Performance Scorecard

TASK	REFERENCE
Stop the Performance Scorecard Application Servers (WebReports, Alerter)	
Back Up Your Current Note and Attachment Directories Release	
Install Performance Scorecard 9.3.3 ● Launch the installation and select **Upgrade Install** to use the existing database.	

TASK	REFERENCE
Copy `hps_1_config.xml` from the previous release to 9.3.3 folder 1. Copy `hps_1_config.xml` from `<HYPERION_HOME>/common/config/product/hps/9.3.1.x` to `<HYPERION_HOME>/common/config/product/hps/9.3.3` 2. Launch the Configuration Utility. 3. To reuse the existing database, just enter the password. **Note:** If you want to use a different database, use the New Install option in the installer. 4. Deploy to application server.	
Before starting Performance Scorecard, modify JVM settings.	See the "Modifying JVM Settings" section of the Performance Scorecard 9.3.3 Readme

Reporting and Analysis Tasks

TASK	REFERENCE
Modify the `patch.bat (sh)` **Script** 1. Set `BIPLUS_HOME` environment variable. 2. Uncomment and set `REPOSITORY_ROOT` environment variable. 3. OPTIONAL: If you are upgrading the Migration Utility, set the `MIGRATION_HOME` environment variable.	For detailed instructions, see the *Hyperion Reporting and Analysis Release 9.3.3 Readme*
Stop all servers and servlets	
Back up Release 9.3.1.x	
Run the SP Installer Utility 1. Run the `patch.bat (sh)` script from *`SP_INSTALLER_HOME/SP_Installer`* folder. **Note:** If you are prompted multiple times to stop services and servlets, press **Enter** and continue each time. 2. If the installer detects a correct `BIPLUS_HOME`, you are prompted to "Stop all services and servlets and then press Enter." 3. Once the installer finishes, analyze log files in the `./log` directory.	For instructions on running a partial install for certain components, see the *Hyperion Release 9.3.3 Reporting and Analysis Readme.*

TASK	REFERENCE
Post-Install Required Steps 1. Re-Deploy the repacked `war/ear` files by using the Configuration Utility Deploy to Application Server task. 2. If you are using Windows, manually re-create all custom Merant 5.2 ODBC data sources with Merant DataDirect 6.0 drivers using the `odbcad32` utility. **Note:** 64-bit machines use `%windir%\SysWOW64\odbcad32` utility. 3. If you are using UNIX, insert all ODBC data sources into *`HYPERION_HOME`*`/common/ODBC/Merant/6.0/odbc.ini` file. **Note:** On HP-UX Itanium, also update `HYPERION_HOME/common/ODBC-64/Merant/6.0/odbc.ini`.	For detailed instructions, see the *Hyperion Reporting and Analysis Release 9.3.3 Readme*
Post-Configuration Step for Workspace Before starting applications, you must modify a setting for WebLogic and WebSphere deployed applications.	For detailed instructions, see the *Hyperion Reporting and Analysis Release 9.3.3 Readme*

Strategic Finance Tasks

TASK	NOTES
Back Up Necessary Information. Back up the `hsfdata` folder and any entity or consolidation files.	For further details, see the Release 9.3.1 *Hyperion Strategic Finance Installation Guide*.
Uninstall Strategic Finance Release 9.3.1.x.	For further details, see the Release 9.3.1 *Hyperion Strategic Finance Installation Guide*
Install Strategic Finance Release 9.3.3.	
1. From the server folder, run `setup.exe` to install the server components. 2. From the reader folder, run `setup.exe` to install the reader components. 3. On each client machine, run `setup.exe` to install the client components.	See "Server Installation" or "Client Installation" in the Release 9.3.1 *Hyperion Strategic Finance Installation Guide*
Before starting Strategic Finance, modify JVM settings.	See the "Modifying JVM Settings" section of the Strategic Finance 9.3.3 Readme

Data Relationship Management Tasks

You do not need to provision users, because this product uses Shared Services only for external authentication.

TASK	NOTES
Uninstall Data Relationship Management Release 9.3.1.x	

TASK	NOTES
Install Data Relationship Management Release 9.3.3 ● Run `mdm_server_setup.exe` to install server components. **Note:** During the server install, you may specify an existing DRM database to automatically upgrade to the 9.3.3 release. ● Run `mdm_migration_setup.exe` to install the Migration utility. ● Run `mdm_web_pub_server_setup.exe` to install Web Publishing (if applicable).	For further instructions, see the Release 9.3.1 *Hyperion Data Relationship Management NTier Installation Guide*
Install 9.3.3 Client Components ● On each client machine, run `mdm_client_setup.exe` to install client components.	.

FDM Tasks

This product does not require Shared Services.

TASK	NOTES
Uninstall FDM Release 9.3.1.x.	
Reboot the computer.	
Install and Configure FDM Release 9.3.3 **Note:** FDM does not use Hyperion Configuration Utility. Configure these components: ● Web server ● Application server ● Load balancer ● Workbench	For detailed instructions, see the Release 9.3.1 *Hyperion Financial Data Quality Management Installation Guide*
Upgrade other FDM components: ● Upgrade the Adapters. ● Upgrade FDM Reports. ● Upgrade existing applications to Release 9.3.3 using the FDM Schema Update Utility.	For detailed instructions, see the Release 9.3.1 *Hyperion Financial Data Quality Management Installation Guide*

7 Changing Repository Passwords

In This Chapter

About Repository Password Maintenance 77
Changing the Shared Services Repository Password 77
Changing the Administration Services Repository Password.....78
Changing Reporting and Analysis Repository Passwords 78
Changing Financial Performance Management Applications Repository Passwords 80
Changing Data Management Repository Passwords.....82

About Repository Password Maintenance

For Hyperion products that require a database repository, you can change repository passwords during and after product deployments.

After changing database repository passwords, restart Hyperion products in the order specified in Appendix A, "Startup Dependencies and Default URLs."

Caution! Change the password in the database used by Workspace only after you perform the procedure in "Changing the Workspace Repository Password" on page 78. If other Hyperion products use the same database that Workspace uses, change the Workspace repository password before changing the password of any other product repository.

Changing the Shared Services Repository Password

➤ To change the Shared Services repository password:

1. **Stop all products registered with Shared Services.**
2. **Stop Shared Services.**
3. **In the database, change the password.**
4. **Run Hyperion Configuration Utility on the machine that hosts Shared Services.**
5. **Select the Shared Services option.**
6. Select **Configure Database**.

7 Select the database type.

8 On the database configuration details panel, enter the new password.

9 When prompted, select to re-use the database.

10 Restart Shared Services according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

Changing the Administration Services Repository Password

➤ To change the Administration Services repository password:

1 Stop Administration Services Console.

2 Stop Administration Services Server.

3 In the database, change the password.

4 Run Hyperion Configuration Utility on the machine that hosts Administration Services.

5 Select the Administration Services option.

6 Select **Configure Database**.

7 Select the database type.

8 On the database configuration details panel, enter the new password.

9 When prompted, select to re-use the database.

10 Restart Administration Services according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

Changing Reporting and Analysis Repository Passwords

- "Changing the Workspace Repository Password" on page 78
- "Changing the Financial Reporting Repository Password" on page 79
- "Changing the Web Analysis Repository Password" on page 79

Changing the Workspace Repository Password

Caution! Do not change the password in the database before you change the repository password in Workspace.

➤ To change the Workspace repository password:

1 Back up the `BIPlus/Common/Config` folder.

2 From Remote Service Configurator, select **Name Service**, **Repository Service**, or **Event Service**.

Note: For information about Remote Service Configurator (RSC), see the *Hyperion Workspace Administrator's Guide*.

3 Click **Show item properties**, and select the **Storage** tab.

4 Change the password and click OK.

5 Repeat step 1 through step 3 for all Name Services, Repository Services, and Event Services with the same database account. Ensure that you enter the same password for each one. If these services use different database accounts, perform this step only for the services that use the account whose password you are changing.

6 Close Remote Service Configurator.

7 In Local Service Configurator, click **Show host properties**, and select the **Database** tab.

8 Change the password and click OK.

This password property applies to all Local Service Configurator services on the local host, all of which use one database account.

9 Repeat step 6 and step 7 on every host that contains Local Service Configurator services, making certain to enter the password the same way each time.

10 If you are using the same database for row-level security, change the password for row-level security from the Administer module.

11 Stop Interactive Reporting Base Service 1.

12 In the database, change the password, ensuring that it matches the password entered for Reporting and Analysis services.

13 Restart Interactive Reporting according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

Changing the Financial Reporting Repository Password

Financial Reporting uses Workspace for connection information, so password changes for Workspace apply to Financial Reporting.

Changing the Web Analysis Repository Password

➤ To change the Web Analysis repository password:

1 Stop Web Analysis.

2 In the database, change the password.

3 Go to <*BIPLUS_HOME*>\InstallableApps\config and back up WebAnalysis.properties.

4 Edit the WebAnalysis.properties file with the following changes:

- Change db.password-encrypted=true to db.password-encrypted=false.
- Set db.password= to the new database password.

Save and close the file.

5 In the <*BIPLUS_HOME*>\InstallableApps\config directory, run EncryptPasswordUtil.bat (Windows) or EncryptPasswordUtil.sh (UNIX).

6 Restart Web Analysis according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

Changing Financial Performance Management Applications Repository Passwords

- "Changing the Planning Repository Password" on page 80
- "Changing the Financial Management Repository Password" on page 81
- "Changing the Performance Scorecard Repository Password" on page 82

Changing the Planning Repository Password

Perform the following procedure on each Planning server.

➤ To change the Planning repository password:

1 Stop Planning.

2 In the database, change the password.

3 Run Hyperion Configuration Utility on the machine that hosts Planning.

4 Select the Planning option.

5 Select to configure the database.

6 Select the database type.

7 On the database configuration details panel, enter the new password.

8 Restart Planning according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

Perform the following procedure on one Planning server.

➤ To change the Planning Applications repository password:

1 Stop Planning.

2 In the database, change the password.

3 Run Hyperion Configuration Utility on the machine that hosts Planning.

4 Select the Planning option.

5 Select **Data Source Configuration**.

6 Select to edit the data source.

7 Select **Data Source Name**.

8 Select the database type.

9 On the database configuration details panel, enter the new password.

10 Enter Essbase connection information.

11 Restart Planning according to the order specified in the Appendix A, "Startup Dependencies and Default URLs."

Changing the Financial Management Repository Password

➤ To change the Financial Management repository password:

1 Stop Financial Management.

2 In the database, change the password.

3 Edit UDL files directly to change the repository password:

- Double click on the UDL to open it.
- Use the Data Link properties editor to change the password.

Note: The UDL path is dependent on where the product is installed, for example: `<installroot>\Hyperion\FinancialManagement`.

Encrypting the Password

➤ To encrypt the password:

1 Stop Financial Management.

2 In a command prompt, navigate to `<installroot>\Hyperion\FinancialManagement\Server`, and run `EncryptHFMUDL.exe` as follows: `EncryptHFMUDL <Source.UDL> <Dest.HFMUDL>`

Note: The destination must have the extension `.HFMUDL`.

3 Run `HFMConfigure.exe` (located in `<installroot>\Hyperion\FinancialManagement\Client`) to switch to the new encrypted file.

4 Delete the existing UDL file or move it to a secure location.

5 Restart Financial Management according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

➤ To un-encrypt the password:

1 Stop Financial Management.

2 In a command prompt, navigate to `<installroot>\Hyperion\FinancialManagement\Server`, run `EncryptHFMUDL.exe` as follows:

a. `EncryptHFMUDL <Source.HFMUDL> <FullPath\Dest.UDL>`

b. If you intend to run with un-encrypted UDL:

i. Run `HFMConfigure` to switch to un-encrypted UDL.

ii. Delete the existing `HFMUDL` file or move it to a secure location.

iii. Restart Financial Management according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

c. If you are not planning to run with the un-encrypted UDL, restart Financial Management according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

Changing the Performance Scorecard Repository Password

➤ To change Performance Scorecard repository password:

1 Stop Performance Scorecard.

2 In the database, change the password.

3 Run Hyperion Configuration Utility on the machine that hosts Performance Scorecard.

4 Select the Performance Scorecard option.

5 Select to configure the database.

6 Select the database type.

7 On the database configuration details panel, enter the new password.

8 When prompted, select to re-use the database.

9 Restart Performance Scorecard according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

Changing Data Management Repository Passwords

- "Changing the FDM Repository Password" on page 83
- "Changing the Data Relationship Management Repository Password" on page 83

Changing the FDM Repository Password

➤ To change the FDM repository password using FDM Workbench:

1 In the database, change the password.

2 From FDM Workbench, choose **Add Application** and log in.

3 Choose the application for which you want to change the repository and select **Modify**.

4 Select the **Database** tab and replace the existing password with the new password.

5 Click **OK**.

6 Click **OK** on the **Application** screen.

7 Ensure that you can log in to the application.

➤ To change the FDM repository password using FDM Web:

1 In the database, change the password.

2 From the FDM Web logon screen, choose **Add Application** and log in.

3 Choose the application for which you want to change the repository password and select **Modify**.

4 Click **OK**.

5 Click **Close**.

6 Ensure that you can log in to the application.

Changing the Data Relationship Management Repository Password

➤ To change the Data Relationship Management repository password:

1 Stop Data Relationship Management.

2 In the database, change the password.

3 Open the Data Relationship Management console.

4 Go to **Database Settings**.

5 In **Database Login**, enter the new password.

6 To test the new password, select **connect**.

7 Enter the password again and select **OK**.

You should see a message, "Successfully connected to database."

8 Restart Data Relationship Management according to the order specified in Appendix A, "Startup Dependencies and Default URLs."

A Startup Dependencies and Default URLs

In This Appendix

Summary List of Services and Processes 85
Services and Processes 86
Default URLs 96

Summary List of Services and Processes

The following Hyperion product services and processes are listed below, in their recommended startup order.

1. Databases for repositories. (For a list of Hyperion products that require a repository database, see Chapter 3, "System Requirements.".)
2. Shared Services OpenLDAP
3. Shared Services application server
4. Reporting and Analysis Core Services
5. Essbase
6. Administration Services application server
7. Oracle's Essbase® Integration Services
8. Provider Services application server
9. Reporting and Analysis (in the following order):
   a. Oracle's Hyperion® Interactive Reporting – System 9
   b. Financial Reporting
   c. Reporting and Analysis Web server
   d. Workspace application server
   e. Oracle's Hyperion® Web Analysis – System 9 application server
10. Application server services or processes (in any order):
    - Financial Reporting application server
11. Remaining services (in any order):
    - Planning application server
    - Financial Management

- Oracle's Hyperion® Strategic Finance
- Performance Scorecard application server
- Performance Scorecard Alerter application server
- Data Relationship Management
- FDM

Services and Processes

The services and processes discussed in this topic are listed in the order in which Hyperion recommends they are started.

1. Shared Services OpenLDAP

Table 33 Shared Services OpenLDAP Service/Process

Windows Start Menu Command:	NA
Registered Service Name:	OpenLDAP-slapd
Display Name in Windows Control Panel:	Hyperion S9 OpenLDAP
Description:	Provides support to access the Shared Services OpenLDAP repository
Windows Startup Script:	`<HSS_HOME>\openLDAP\StartService.bat`
UNIX Startup Script:	`<HSS_HOME>/openLDAP/startOpenLDAP.sh`

2. Shared Services Application Server

Table 34 Shared Services Application Server Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Foundation Services > Start Shared Services
Registered Service Name:	HyS9Shared Services
Display Name in Windows Control Panel:	Hyperion S9 Shared Services
Description:	Hyperion Shared Services that support Hyperion applications, including authentication, user provisioning, task flow management, and data and metadata synchronization

Windows Startup Script:	• Tomcat, WebSphere, and WebLogic 9: <*Hyperion_Home*>\deployments\<*AppServNameAndVersion*>\bin\startSharedServices9.bat • WebLogic 8: <*HSS_Home*>\AppServer\InstalledApps\<*AppServName*>\<*Version*>\SharedServices9\startSharedServices9.bat • Oracle: <*OracleInstallDir*>\bin\emctl start iasconsole <*OracleInstallDir*>\opmn\bin\opmnctl startall
UNIX Startup Script:	• Tomcat, WebSphere, and WebLogic 9: <*Hyperion_Home*>/deployments/<*AppServNameAndVersion*>/bin/startSharedServices9.bat • WebLogic 8: <*HSS_Home*>/AppServer/InstalledApps/<*AppServName*>/<*Version*>/SharedServices9/startSharedServices9.bat • Oracle: <*OracleInstallDir*>/bin/emctl <*OracleInstallDir*>/opmn/bin/opmnctl

3. Reporting and Analysis Core Services

Table 35 Reporting and Analysis Core Services: Hyperion Interactive Reporting Base Service 1

Windows Start Menu Command:	Start > Programs > Hyperion > Reporting and Analysis > Start Reporting and Analysis
Registered Service Name:	HyS9Core1
Display Name in Windows Control Panel:	Hyperion S9 BI+ 9.3 Core Services 1
Description:	Provides core services for authorization, session management, and document publication
Windows Startup Script:	<*BIPLUS_HOME*>\bin\startCommonServices.bat
UNIX Startup Script:	<*BIPLUS_HOME*>/bin/startCommonServices.sh

4. Essbase

Table 36 Essbase Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Essbase > Essbase
Registered Service Name:	HyS9ESBAgent9.3.3 — hypservice
Display Name in Windows Control Panel:	Hyperion S9 BI+ Analytic Services 9.3.3 — <*ServerName*>
Description:	Stores data with multiple dimensions and manages analytical data models, data storage, calculations, and data security
Windows Startup Script:	ARBORPATH\bin\essbase.exe
UNIX Startup Script:	$ARBORPATH/bin/startEssbase.sh

5. Administration Services Application Server

Table 37 Administration Services Application Server Service/Process

Windows Start Menu Command:	Start > Programs > Hyperion > Administration Services > Start Administration Services Server
Registered Service Name:	HyS9aas
Display Name in Windows Control Panel:	Hyperion S9 Administration Services <*AppServer*>
Description:	Controls the running of the Administration Services application server
Windows Startup Script:	• WebSphere, WebLogic 9, and deployed Tomcat deployment (via Hyperion Configuration Utility): <*Hyperion_Home*>\deployments\<*AppServNameAndVersion*>\bin\startaas.bat • WebLogic 8.1.x: *AASPATH*\server\bin\startaas.exe • Default Tomcat Deployment: *AASPATH*\server\bin\startEAS.exe
UNIX Startup Script:	• WebSphere, WebLogic 9, and deployed Tomcat deployment (via Hyperion Configuration Utility): <*Hyperion_Home*>/deployments/<*AppServNameAndVersion*>/bin/startaas.sh • WebLogic 8.1.x: <*AASPATH*>/server/bin/startaas.sh

6. Integration Services

Table 38 Integration Services Service/Process

Windows Start Menu Command:	Start > Programs > Hyperion > Integration Services > Integration Server
Registered Service Name:	olapisvc.exe
Display Name in Windows Control Panel:	Essbase Integration Server
Description:	Essbase Integration Server
Windows Startup Script:	<*HYPERION_HOME*>\AnalyticIntegrationServices\bin\olapisvc.exe
UNIX Startup Script:	$HOME/Hyperion/AnalyticIntegrationServices/ais_start

7. Provider Services Application Server

Table 39 Provider Services Application Server Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Provider Services > Start Provider Services
Registered Service Name:	HyS9aps

Display Name in Windows Control Panel:	Hyperion S9 Provider Services <*AppServer*>
Description:	Controls the running of an application server for Provider Services
Windows Startup Script:	• WebSphere, Weblogic 9, and Tomcat: <*Hyperion_Home*>\deployments\<*AppServNameAndVersion*>\bin\startaps.bat • WebLogic 8.1.x: <*APS_HOME*>\bin\startaps.bat
UNIX Startup Script:	• WebSphere, Weblogic 9, and Tomcat: <*Hyperion_Home*>/deployments/<*AppServNameAndVersion*>/bin/startaps.bat • WebLogic 8.1.x: <*APS_HOME*>/bin/startaps.bat

8. Reporting and Analysis Services/Processes

a. Interactive Reporting

Table 40 Interactive Reporting Service/Process

Windows Start Menu Command:	Start > Programs > Hyperion > Reporting and Analysis > Start Reporting and Analysis
Registered Service Name:	HS9IRSvc1
Display Name in Windows Control Panel:	Hyperion S9 BI+ 9.3 Interactive Reporting Service 1
Description:	Process monitor that manages the Interactive Reporting Service, Data Access Service, Interactive Reporting Jobs processes, and the logging helper process.
Windows Startup Script:	<*BIPLUS_HOME*>\bin\startIRM.bat
UNIX Startup Script:	<*BIPLUS_HOME*>/bin/startIRM.sh

c. Financial Reporting

Table 41 Financial Reporting Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Reporting and Analysis > Start Financial Reporting
Registered Service Name:	• Financial Reporting Java RMI Registry: HyS9FRRMI • Financial Reporting Print Server: HyS9FRPrint • Financial Reporting Report Server: HyS9FRReport • Financial Reporting Scheduler Server: HyS9FRSched

Display Name in Windows Control Panel:	• Hyperion S9 BI+ Financial Reporting Java RMI Registry • Hyperion S9 BI+ Financial Reporting Print Server • Hyperion S9 BI+ Financial Reporting Report Server • Hyperion S9 BI+ Financial Reporting Scheduler Server
Description:	• Financial Reporting RMI Registry Service: Provides a Java RMI Registry for Financial Reporting • Financial Reporting Print Server: Generates PDF, batch, and scheduled job output for Financial Reporting • Financial Reporting Report Server: Generates and formats reports and books, including specified calculations for Financial Reporting • Financial Reporting Scheduler Server: Responds to scheduled batch requests for Financial Reporting • Financial Reporting Web application: Provides a Workspace module for Financial Reporting
Windows Startup Script:	`<BIPLUS_HOME>\bin\start_BIPlus.bat`
UNIX Startup Script:	`<BIPLUS_HOME>/bin/freporting {start|stop|restart}`

d. Reporting and Analysis Web Server

Table 42 Reporting and Analysis Web Server Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Reporting and Analysis > Start Web Analysis
Registered Service Name:	• Apache: HyS9Apache2 • IIS: IISADMIN • IHS 6.0: IBM HTTP Server 6.0 • IHS 6.1: IBM HTTP Server 6.1
Display Name in Windows Control Panel:	• Apache: Hyperion S9 Apache 2.0 • IIS: IIS Admin Service • IHS 6.1: IBM HTTP Server 6.1 • IHS 6.0: IBM HTTP Server 6.0
Description:	• Apache: Apache/2.0.52 (Win32) • IIS: IIS Admin Service • IHS 6.0: IBM_HTTP_Server/6.0.2 Apache/2.0.47 (Win32) • IHS 6.1: IBM_HTTP_Server
Windows Startup Script (Apache only):	`<HYPERION_HOME>\common\httpServers\Apache\2.0.52\bin\StartHyperionApacheService.cmd`
UNIX Startup Script (Apache only):	`<HYPERION_HOME>/common/httpServers/Apache/2.0.52/bin/apachectl {start|stop|restart}`

b. Workspace Application Server

Table 43 Workspace Application Server Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Reporting and Analysis > Utilities and Administration > Start Reporting and Analysis Core Services
Registered Service Name:	HyS9Workspace
Display Name in Windows Control Panel:	Hyperion S9 BI+ 9.3 Workspace
Description:	HyS9Workspace - Hyperion S9 BI+ Workspace web application for <APP_SERVER> <APP_VERSION>
Windows Startup Script:	• WebSphere and Tomcat: `<HYPERION_HOME>\deployments\<AppServNameAndVersion>\bin\startWorkspace.bat` • WebLogic 9: `<HYPERION_HOME>\deployments\WebLogic9\bin\startWorkspace.cmd` • WebLogic 8: `<HYPERION_HOME>\AppServer\InstalledApps\WebLogic\8.1\WorkspaceDomain\bin\startWorkspace.bat` • Oracle: `<OracleInstallDir>\opmn\bin\opmnctl startall`
UNIX Startup Script:	• WebSphere, WebLogic 9, and Tomcat: `<HYPERION_HOME>/deployments/<AppServNameAndVersion>/bin/startWorkspace.sh` • WebLogic 8: `<BIPLUS_HOME>/AppServer/InstalledApps/WebLogic/8.1/WorkspaceDomain/bin/startWorkspace.sh` • Oracle: `<OracleInstallDir>/opmn/bin/opmnctl startall`

e. Web Analysis Application Server

Table 44 Web Analysis Application Server Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Reporting and Analysis > Start Reporting and Analysis
Registered Service Name:	HyS9WebAnalysis
Display Name in Windows Control Panel:	Hyperion S9 BI+ 9.3 Web Analysis
Description:	HyS9WebAnalysis - Hyperion S9 BI+ Web Analysis web application for <APP_SERVER> <APP_VERSION>.
Windows Startup Script:	• WebSphere and Tomcat: `<HYPERION_HOME>\deployments\<AppServNameAndVersion>\bin\startWebAnalysis.bat` • WebLogic 9: `<HYPERION_HOME>\deployments\WebLogic9\bin\startWebAnalysis.cmd` • WebLogic 8: `<BIPLUS_HOME>\AppServer\InstalledApps\WebLogic\8.1\WebAnalysisDomain\bin\startWebAnalysis.bat` • Oracle: `<OracleInstallDir>\opmn\bin\opmnctl startall`

UNIX Startup Script:	• WebSphere, WebLogic 9, and Tomcat: `<HYPERION_HOME>/deployments/<AppServNameAndVersion>/bin/startWebAnalysis.sh` • WebLogic 8: `<BIPLUS_HOME>/AppServer/InstalledApps/WebLogic/8.1/WebAnalysisDomain/bin/startWebAnalysis.sh` • Oracle: `<OracleInstallDir>/opmn/bin/opmnctl startall`

9. Application Server Services/Processes

The following application server services or processes can be started in any order.

Financial Reporting Application Server

Table 45 Financial Reporting Application Server Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Reporting and Analysis > Start Reporting and Analysis
Registered Service Name:	HyS9FRWeb
Display Name in Windows Control Panel:	Hyperion S9 BI+ 9.3 Financial Reporting Web application
Description:	HyS9FRWeb - Provides a Workspace module for Financial Reporting
Windows Startup Script:	• WebSphere and Tomcat: `<HYPERION_HOME>\deployments\<AppServNameAndVersion>\bin\startFinancialReporting.bat` • WebLogic 9: `<HYPERION_HOME>\deployments\WebLogic9\bin\startFinancialReporting.cmd` • WebLogic 8: `<BIPLUS_HOME>\AppServer\InstalledApps\WebLogic\8.1\FinancialReportingDomain\bin\startFinancialReporting.bat` • Oracle: `<OracleInstallDir>\opmn\bin\opmnctl startall`
UNIX Startup Script:	• WebSphere, WebLogic 9, and Tomcat: `<HYPERION_HOME>/deployments/<AppServNameAndVersion>/bin/startFinancialReporting.sh` • WebLogic 8: `<BIPLUS_HOME>/AppServer/InstalledApps/WebLogic/8.1/FinancialReportingDomain/bin/startFinancialReporting.sh` • Oracle: `<OracleInstallDir>/opmn/bin/opmnctl startall`

10. Remaining Product Services

The following product services can be started in any order.

Planning Application Server

Table 46 Planning Application Server Services/Processes

Windows Start Menu Command:	Start > Programs > Hyperion > Planning > Start Planning
Registered Service Name:	HyS9Planning
Display Name in Windows Control Panel:	Hyperion S9 Planning
Description:	Provides access support for Planning Web server
Windows Startup Script:	• WebSphere, WebLogic 9, and Tomcat: `<HYPERION_HOME>\deployments\<AppServNameAndVersion>\bin\startHyperionPlanning.bat` • WebLogic 8.1: `<Planning_HOME>:\AppServer\InstalledApps\<AppServName>\<version>\HyperionPlanningDomain\startHyperionPlanning.bat`

UNIX Startup Script:	• WebSphere, WebLogic 9, and Tomcat: `<HYPERION_HOME>/deployments/<AppServNameAndVersion>/bin/startHyperionPlanning.sh`
	• WebLogic 8.1: `<Planning_HOME>/AppServer/InstalledApps/<AppServName>/<version>/HyperionPlanningDomain/startHyperionPlanning.sh`
	• Oracle:
	`<OracleInstallDir>/bin/emctl`
	`<OracleInstallDir>/opmn/bin/opmnctl`

Financial Management

Table 47 Financial Management Services

Windows Start Menu Command:	Start > Programs > Hyperion > Financial Management
Registered Service Name:	• HFM Service: Hyperion S9 Financial Management Service • HFM DME Listener: Hyperion S9 Financial Management DME Listener
Display Name in Windows Control Panel:	• HFM Service: Hyperion S9 Financial Management Service • HFM DME Listener: Hyperion S9 Financial Management DME Listener
Description:	• HFM Service: Service which perpetuates application instances for optimal login performance • HFM DME Listener: Hyperion Financial Management DME Listener for communication with the Hyperion Data Movement Engine. If this service is stopped, the DME Web service will not be able to communicate with all HFM instances on this server.
Windows Startup Script:	`<Hyperion_Home>\FinancialManagement\Client\HFM.exe`
UNIX Startup Script:	NA

Strategic Finance

Table 48 Strategic Finance Service

Windows Start Menu Command:	Start > Programs > Hyperion > Strategic Finance > Strategic Finance
Registered Service Name:	HyS9HSFsrv
Display Name in Windows Control Panel:	Hyperion S9 Strategic Finance Service
Description:	Provides Hyperion Strategic Finance services including entity repository management, authentication, access control, consolidation, data and metadata management
Windows Startup Script:	`<Hyperion_Home>\StrategicFinance\Client\hsf.exe`
UNIX Startup Script:	NA

Performance Scorecard Application Server

Table 49 Performance Scorecard Application Server Services/Processes

Windows Start Menu Command:	Start > Hyperion > Performance Scorecard > startWebReports on *<appserver>*
Registered Service Name:	HyS9HPS
Display Name in Windows Control Panel:	Hyperion S9 Performance Scorecard 9.3.1.0.0 *<AppServer>*
Description:	Starts and stops an instance of Performance Scorecard running under an application server.
Windows Startup Script:	• WebSphere, WebLogic 9, and Tomcat: `<HYPERION_HOME>\deployments\<AppServNameAndVersion>\bin\startwebreportsDomain.bat` • WebLogic 8.1: `<HPS_INSTALL_DIRECTORY>\AppServer\InstalledApps\<AppServName>\<version>\webreportsDomain\bin\startwebreports.bat`
UNIX Startup Script:	• WebSphere, WebLogic 9, and Tomcat: `<HYPERION_HOME>/deployments/<AppServNameAndVersion>/bin/startwebreportsDomain.sh` • WebLogic 8.1: `<HPS_INSTALL_DIRECTORY>/AppServer/InstalledApps/<AppServName>/<version>/webreportsDomain/bin/startwebreports.sh`

Performance Scorecard Alerter Application Server

Table 50 Performance Scorecard Alerter Application Server Services/Processes

Windows Start Menu Command:	Start > Hyperion > Performance Scorecard > startHPSAlerter on <appserver>
Registered Service Name:	HyS9Alerter

Display Name in Windows Control Panel:	Hyperion S9 Performance Scorecard Alerter 9.3.1.0.0 <*AppServer*>
Description:	Starts and stops an instance of Performance Scorecard Alerter running under an application server.
Windows Startup Script:	• WebSphere, WebLogic 9, and Tomcat: <*HYPERION_HOME*>\deployments\<*AppServNameAndVersion*>\bin\startalerterDomain.bat • WebLogic 8.1: <*HPS_INSTALL_DIRECTORY*>\AppServer\InstalledApps\<*AppServName*>\<*version*>\alerterDomain\bin\startalerter.bat
UNIX Startup Script:	• WebSphere, WebLogic 9, and Tomcat: <*HYPERION_HOME*>/deployments/<*AppServNameAndVersion*>/bin/startalerterDomain.sh • WebLogic 8.1: <*HPS_INSTALL_DIRECTORY*>/AppServer/InstalledApps/<*AppServName*>/<*version*>/alerterDomain/bin/startalerter.sh

Data Relationship Management

Table 51 Data Relationship Management Services

Windows Start Menu Command:	Start > Programs > Hyperion > Data Relationship Management > Data Relationship Management Console
Registered Service Name:	• Services: HyS9MDMSvc • Web Publishing: HyS9MDMWebPubSvc
Display Name in Windows Control Panel:	• Services: Hyperion Data Relationship Management • Web Publishing: Hyperion Data Relationship Management Web Publishing
Description:	• Services: HyS9MDMSvc - Hyperion Data Relationship Management Services • Web Publishing: HyS9MDMWebPubSvc - Hyperion Data Relationship Management Web Publishing
Windows Startup Script:	<*HYPERION_HOME*>\Master Data Management\mdm_ntier_client_http.exe
UNIX Startup Script:	NA

FDM

Table 52 FDM Service

Windows Start Menu Command:	NA
Registered Service Name:	HyS9FDMTaskManagerSrv
Display Name in Windows Control Panel:	Hyperion S9 Financial Data Quality Management Task Manager Service
Description:	Provides the ability to schedule Hyperion Financial Data Quality Management tasks.
Windows Startup Script:	NA
UNIX Startup Script:	NA

Default URLs

Table 53 Default URLs

Product	Default URL
Oracle's Hyperion® Shared Services User Management Console	`http://<hostname>:58080/interop`
Workspace **Note:** From Workspace, you can access Financial Management, Planning, Performance Management Architect, and Reporting and Analysis.	`http://<WebServer>:<port>/workspace/` where <*WebServer*> is the Web server machine hostname and <*port*> is the Web server listen port; for example, 19000 if using the Apache instance bundled with Reporting and Analysis.
Oracle's Hyperion® Performance Scorecard – System 9	`http://<hostname>:18080/HPSWebReports`
Oracle's Hyperion® Data Relationship Management	`http://<hostname>/mdm_ntier`
FDM	`http://<hostname>/HyperionFDM`

B Using Release 9.3.3 Products With Components From Later Releases

In This Appendix

Using Release 9.3.3 Products With Performance Management Architect 97
Using Release 9.3.3 Products With Disclosure Management 11.1.2 103
Using Release 9.3.3 Products with Financial Close Management Release 11.1.2 106

In Release 9.3.3, there are certain scenarios in which you will have to use Release 9.3.3 components with components from later releases. This appendix describes each scenario and contains instructions for deploying in a multiple-release environment. The scenarios covered are:

- Using Release 9.3.3 Products With Performance Management Architect Release 11.1.1.3
- Using Release 9.3.3 Products With Disclosure Management Release 11.1.2
- Using Release 9.3.3 Products With Financial Close Management Release 11.1.2

For specific information on which products are compatible, see Chapter 4, "Release Compatibility."

Using Release 9.3.3 Products With Performance Management Architect

If you are using Performance Management Architect to create applications for Planning Release 9.3.3, Financial Management Release 9.3.3, or Essbase Release 9.3.3, you need to upgrade Performance Management Architect, Shared Services, and Reporting and Analysis from Release 9.3.1.x to Release 11.1.1.3.

The high-level steps to perform are:

1. Upgrade the following products from Release 9.3.1.x to Release 11.1.1.3:
   - Performance Management Architect
   - Shared Services
   - Reporting and Analysis (Financial Reporting and EPM Workspace)

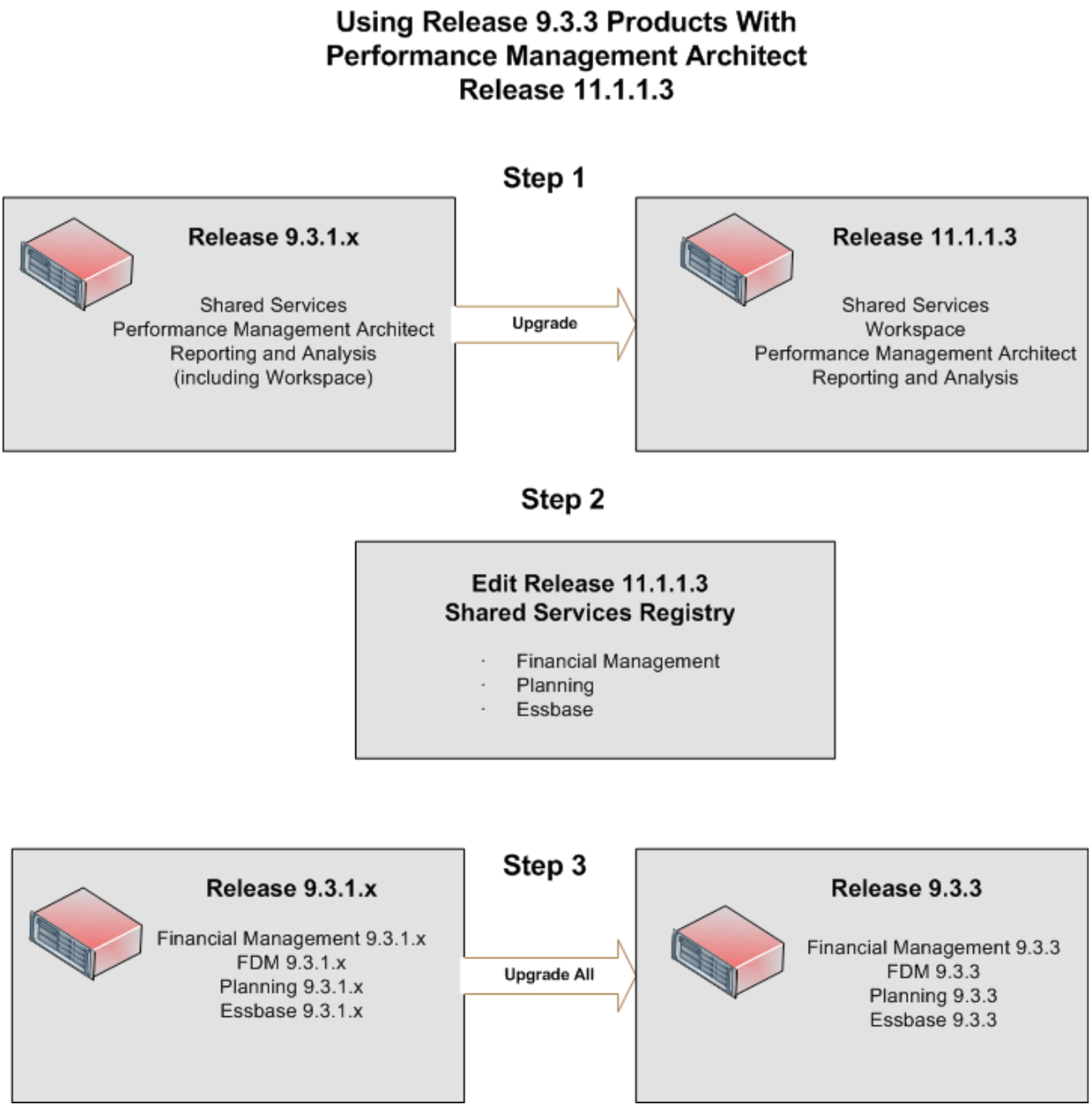
   Note: If you are using Internet Explorer 8, use EPM Workspace service fix 11.1.1.3.15 (patch 9314073) or later.

For detailed instructions on upgrading these products, see the *Oracle Hyperion Enterprise Performance Management System Release 11.1.1.3 Installation and Configuration Guide*.

Note: During configuration of Performance Management Architect Release 11.1.1.3, you must manually change the ports to be unique. The Web Application ports should be 19091 (Listen port) and 19047 (SSL Listen port). The Data Synchronizer ports should be 19101 (Listen port) and 19145 (SSL Listen port).

2. Update the 11.1.1.3 Shared Services Registry using the instructions in the next section, "Updating the Shared Services Registry".
3. Upgrade the other 9.3.1.x products to Release 9.3.3.

Note: For detailed instructions on upgrading products to Release 9.3.3, use this guide and the individual product Readmes.



Updating the Shared Services Registry

Before Release 9.3.3 products will work with Release 11.1.1.3, you must update the 11.1.1.3 Shared Services Registry with information from Release 9.3.1.*x*. The `epmsys_registry` utility is provided to make these edits.

➤ To update the Shared Services Registry:

1 **Make sure you have upgraded to the 11.1.1.3 release of Shared Services and backed up the Shared Services Registry database.**

When you upgrade to the current release of Shared Services, templates are installed to *HYPERION_HOME*/common/config/9.5.0.0/resources/mixedrelease. The templates are provided to simplify making updates to the Shared Services Registry.

Tip: Back up the templates before you proceed. You may need to refer to them later.

2 **Review which template files you need to edit, based on the products you have.**

Table 54 Templates for Working in a Mixed-Release Environment

File Name	When to Use	What it Does
Essbase.xml	If you are using Essbase Release 9.3.1.*x* with Performance Management Architect to create Essbase applications.	Creates the 9.3.1.*x* Essbase component hierarchy and adds entries for one or more instances of Essbase Server release 9.3.1.x and Administration Services to the Shared Services Registry.
Planning.xml	If you are using Planning Release 9.3.1*x*.	Creates the 9.3.1.x Planning component hierarchy and adds entries for one or more instances of the Planning release 9.3.*x* Web application to the Shared Services Registry.
FinancialManagement.xml	If you are using Financial Management Release 9.3.1*x*.	Creates the 9.3.1*x* Financial Management component hierarchy and adds entries for one or more instances of Financial Management release 9.3.*x* Web application, cluster, and server to the Shared Services Registry.

If you have already used one of the previous files for a product, and later add an additional server, Web application, or cluster, use the following files to make additional updates to the Shared Services Registry.

Table 55 Templates to Use if You Are Adding an Additional Server, Web Application, or Cluster

File Name	When to Use	What it Does
Essbase_server.xml	If you are using Essbase Release 9.3.1*x*with Performance Management Architect to create Essbase applications, and you want to add one or more additional Essbase Servers to the Shared Services Registry. **Caution!** Use this file only after you have used `Essbase.xml`.	Adds entries for one or more additional instances of Essbase Server Release 9.3.1*x* to the Shared Services Registry.
Essbase_eas.xml	If you are using Administration Services release 9.3.1*x* with Performance Management Architect to create Essbase applications, and you want to add one or more additional Administration Services Web applications to the Shared Services Registry. **Caution!** Use this file only after you have used `Essbase.xml`.	Adds entries for one or more additional Oracle's Essbase® Administration Services release 9.3.1*x* Web applications to the Shared Services Registry.
Planning_webapp.xml	If you are using Planning Release 9.3.1.*x*, and you want to add one or more additional Planning Web applications to the Shared Services Registry. **Caution!** Use this file only after you have used `Planning.xml`.	Adds entries for one or more additional instances of the Planning 9.3.1.*x* Web application to the Shared Services Registry.

File Name	When to Use	What it Does
FinancialManagement_webapp.xml	If you are using Financial Management Release 9.3.1.x, and you want to add one or more additional Financial Management Web applications to the Shared Services Registry. **Caution!** Use this file only after you have used `FinancialManagement.xml`.	Adds entries for one or more additional instances of the Financial Management Release 9.3.1*x* Web application to the Shared Services Registry.
FinancialManagement_cluster.xml	If you are using Financial Management Release 9.3.1.x, and you want to add one or more additional Financial Management clusters to the Shared Services Registry. **Caution!** Use this file only after you have used `FinancialManagement.xml`. **Tip:** If you create a new cluster after you've completed this procedure, you must update this file again.	Adds entries for one or more additional instances of the Financial Management Release 9.3.1.x cluster to the Shared Services Registry.
FinancialManagement_server.xml	If you are using Financial Management Release 9.3.1.x, and you want to add one or more additional Financial Management Servers to the Shared Services Registry. **Caution!** Use this file only after you have used `FinancialManagement.xml`.	Adds entries for one or more additional instances of Financial Management Release 9.3.1.x to the Shared Services Registry.

3 **On a machine hosting the 11.1.1.3 Hyperion software, edit one or more of the files in any text editor according to the instructions in the file. The files are in:**

`HYPERION_HOME/common/config/9.5.0.0/resources/mixedrelease`

You have to make the edits on one machine only.

Note: If you enter any non-English characters while editing the templates, save the file using UTF-8 encoding.

4 **On the machine on which you edited the templates, go to `HYPERION_HOME/common/config/9.5.0.0` and for each file that you edited, run the following command:**

```
epmsys_registry.bat createcomponenthierarchy resources/mixedrelease/file
```

where *file* is the name of the file you edited in the previous step.

For each product, run `epmsys_registry` with the following files first: `Essbase.xml`, `Planning.xml`, `Scorecard.xml`, and `FinancialManagement.xml`.

For UNIX, enter:

```
epmsys_registry.sh createcomponenthierarchy resources/mixedrelease/file
```

where *file* is the name of the file you edited in the previous step.

For example, if you have Release 9.3.1.x of Essbase, Planning, and Financial Management, and you have two Planning Web applications, run the following commands:

```
epmsys_registry createcomponenthierarchy resources/mixedrelease/Essbase.xml

epmsys_registry createcomponenthierarchy resources/mixedrelease/Planning.xml

epmsys_registry createcomponenthierarchy resources/mixedrelease/
FinancialManagement.xml
```

The epmsys_registry utility updates the Shared Services Registry with the information you entered in the files.

If you later add an additional Planning Web application, run the following command:

```
epmsys_registry createcomponenthierarchy resources/mixedrelease/Planning_webapp.xml
```

5 **If you are using Financial Management Release 9.3.1.x, from the directory *HYPERION_HOME*/common/config/9.5.0.0, execute the following command:**

```
epmsys_registry addfile FINANCIAL_MANAGEMENT_PRODUCT/@EPMA_deployUI resources/
mixedrelease/HFM_EPMA_deployUI.xml
```

You should see the response "The new property has been added to the component."

6 **If you are using Essbase Release 9.3.1.x, from the directory *HYPERION_HOME*/common/config/9.5.0.0, execute the following command:**

```
epmsys_registry addfile ESSBASE_PRODUCT/@EPMA_deployUI resources/mixedrelease/
Essbase_EPMA_deployUI.xml
```

You should see the response "The new property has been added to the component."

7 **Run Oracle's Hyperion® Configuration Utility™ and configure Workspace Web Server again. (On the Task Selection page, select the Workspace Web Server Configuration task.)**

Keep all products selected.

You must complete the Web Server Configuration task for Workspace last to ensure that all products are configured to work with Workspace.

8 **Restart the Workspace Web Application and Shared Services.**

Tip: If you realize that you made a mistake in the template files after you have already run epmsys_registry, you need to make additional edits to the Shared Services Registry to correct the error. See the *Oracle Hyperion Enterprise Performance Management Installation and Configuration Guide for Release 11.1.1.3*.

Caution! Run epmsys_registry only once with the following files: Essbase.xml, Planning.xml, Scorecard.xml, and FinancialManagement.xml.

Using Reporting and Analysis 11.1.1.3 with Planning 9.3.3

If you are using Planning Release 9.3.3 with Workspace Release 11.1.1.3 and Shared Services Release 11.1.1.3, you must perform additional configuration steps.

Note: If you are using Internet Explorer 8 with Workspace Release 11.1.1.3, you need service fix 11.1.1.3.15 (patch 9314073) or later.

➤ To use Reporting and Analysis Release 11.1.1.3 with Planning Release 9.3.3:

1 **Edit fr.env in Hyperion_Home/products/biplus/lib as follows:**

```
#ADM_HP_HOME=%HYPERION_HOME%/common/ADM/Planning/9.5.0
ADM_HP_HOME=%HYPERION_HOME%/common/ADM/Planning/9.3.1.0
```

Note: In Release 9.3.3, the directory paths may still contain 9.3.1.

2. **For WebLogic, WebSphere, or Tomcat: In** `setCustomParamsFinancialReporting.cmd`**, which is found in** *HYPERION_HOME*`/deployments/`*AppServerType*`/bin/`**, make sure the version number in the following entry is 9.3.1.0:** *HYPERION_HOME*`/common/ADM/Planning/`*version*`/bin`.
3. **For Oracle Application Server, add the following library search path variable for your OC4J instance in Oracle Application Server console:** *HYPERION_HOME*`/common/ADM/Planning/`*version*`/bin` **where** *version* **is the version of Planning that is installed.**
4. **For Oracle Application Server, edit** `/Oracle_Home/j2ee/FinancialReporting/config/application.xml` **and insert the following lines just before the entry that sets the library path to** `biplus/lib`:

   ```
   <library path="${HYPERION_HOME}\common\ADM\Planning\9.3.1.0\lib"/>
   <library path="C:\Hyperion\products\biplus\lib" />
   ```

   Note: Do not remove any values from `application.xml`.
5. **Restart Financial Reporting Web application and Financial Reporting Report Server service.**

Using Performance Management Architect With Release 11.1.2 Products

Once Oracle's Enterprise Performance Management Architect Release 11.1.1.3 is working with Release 9.3.3 products, you can also add a separate instance of Release 11.1.2 products in order to work with Financial Close Management or Disclosure Management.

See "Using Release 9.3.3 Products With Disclosure Management 11.1.2" on page 103 or "Using Release 9.3.3 Products with Financial Close Management Release 11.1.2" on page 106.

Using Release 9.3.3 Products With Disclosure Management 11.1.2

If you are using Release 9.3.3 products with Release 11.1.2 Disclosure Management, use this section to understand how this multiple release environment should be set up in your environment.

Disclosure Management allows you to assemble a reporting package for submission to a regulatory agency that includes financial statements as well as supporting schedules and commentary which may exist in Microsoft Excel, Word, and a Financial Reporting report. While viewing Financial Reporting documents in Workspace, users can perform data source level mapping with the XBRL Taxonomy Mapping Tool, that allows for reusable taxonomy element mapping within Hyperion Financial Management, Planning, and Essbase.

To use Disclosure Management Release 11.1.2 with Release 9.3.3 products, you need to upgrade your Release 9.3.1.x products to Release 9.3.3 and then set up a separate instance for Release 11.1.2 products.

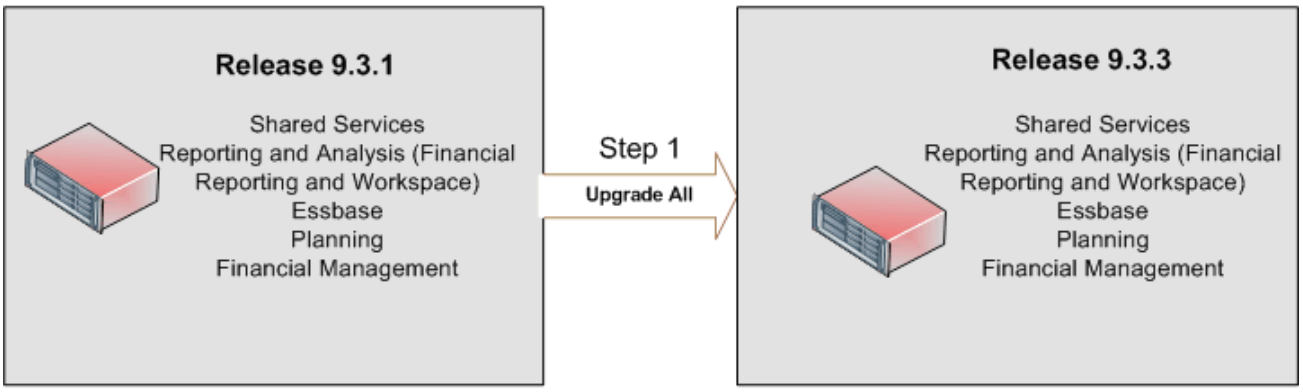
The high-level steps to perform are:

1. Upgrade your Release 9.3.1.x products to Release 9.3.3.
   - Shared Services
   - Reporting and Analysis (including Workspace and Financial Reporting)
   - Oracle's Hyperion® Essbase® – System 9
   - Oracle's Hyperion® Planning – System 9
   - Financial Management

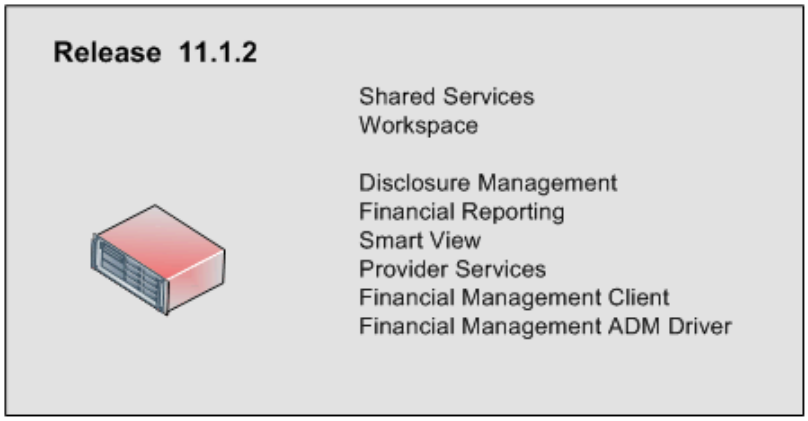
   Note: For detailed instructions on upgrading products to Release 9.3.3, use this guide and the individual product Readmes.
2. Install and configure a separate instance of Release 11.1.2 components including:
   - Shared Services
   - Workspace
   - Oracle's Hyperion® Provider Services
   - Financial Reporting
   - Oracle Hyperion Disclosure Management
   - Smart View
   - Financial Management Client and ADM Driver components

   For detailed instructions on installing and configuring Release 11.1.2 products, see the *Oracle Hyperion Enterprise Performance Management System Release 11.1.2 Installation and Configuration Guide*.
3. Using 11.1.2 Financial Reporting or 11.1.2 Oracle's Hyperion® Smart View for Office, connect to 9.3.3 data sources.

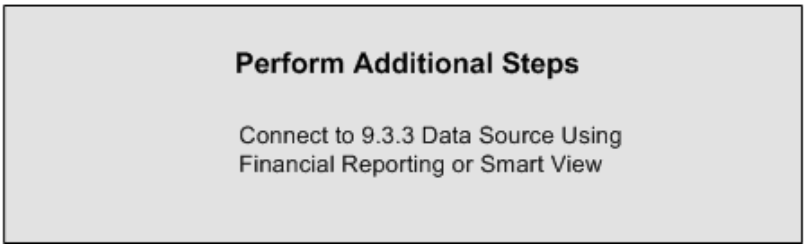
Using Release 9.3.3 With Disclosure Management 11.1.2



Step 2 – Install Separate Instance of Release 11.1.2 Products



Step 3



Using Release 9.3.3 Products with Financial Close Management Release 11.1.2

If you are using Release 9.3.3 products with Release 11.1.2 Financial Close Management, use this section to understand how this multiple release environment should be set up in your environment.

Financial Close Management helps companies define, execute, and report on the interdependent activities of a financial close period. An IntegrationTypes.XML file for Financial Management, Financial Reporting and FDM to use with Financial Close Management is provided for each product. The IntegrationTypes.XML file contains all of the Integration Types and definitions associated with the particular product, and is available for download from My Oracle Support.

The high-level steps to perform are:

1. Upgrade Release 9.3.1.x products to Release 9.3.3.
   - Shared Services
   - Financial Management
   - Oracle's Hyperion® Reporting and Analysis – System 9 (including Workspace and Financial Reporting)
   - FDM

   Note: For detailed instructions on upgrading products to Release 9.3.3, use this guide and the individual product Readmes.
2. Install and configure a separate instance of Release 11.1.2 products including:
   - Oracle's Hyperion® Shared Services
   - Oracle's Hyperion® Workspace
   - Financial Reporting
   - Financial Close Management

     Note: You must also apply the Financial Close Management 11.1.2.0.1 service fix. For detailed instructions on the service fix, see the Financial Close Management 11.1.2.0.1 Readme.
   - Financial Management Web Services component (Use Deploy to Application Server option in the 11.1.2 EPM System Configurator).

     Note: You must also apply the Financial Management 11.1.2.0.2 service fix. For detailed instructions on the service fix, see the Financial Management 11.1.2.0.2 Readme.

   For detailed instructions on installing and configuring Release 11.1.2 products, see the *Oracle Hyperion Enterprise Performance Management System Release 11.1.2 Installation and Configuration Guide.*
3. Perform additional setup steps for the following products:

a. Financial Management

   i. In the 11.1.2 environment, run the HIT Registry update to add HFM ASP.NET Web Service and HFM Web Application nodes and then create the Registry Tree using the updated information.

   ii. In the 11.1.2 environment, add proxy information to the Oracle HTTP Server configuration.

   iii. In the 9.3.3 environment, check that `HFMApplicationService` is using ASP.NET version 2.0.50727.

   iv. In the 11.1.2 environment, import the 9.3.3 version of the HFM Integration XML file, `FMIntegrationTypes.xml` into Financial Close Management 11.1.2.0.1.

b. Financial Reporting

   Follow these steps to set up Financial Close Management to connect to Financial Reporting and run reports:

   i. Modify the 9.3.3 `FRIntegrationTypes.xml` file according to the instructions provided with the file that you downloaded from MyOracleSupport.

   ii. Import the modified file into Financial Close Management following the instructions in the "Manage Integration Types" section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.

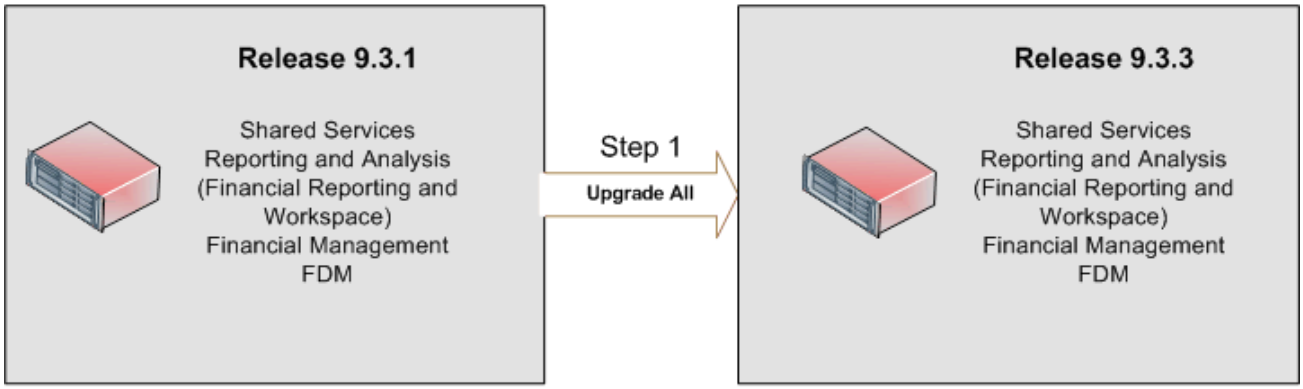
   Note: You can launch Financial Close Management Release 11.1.2 from Oracle Hyperion Workspace Release 9.3.3. For detailed instructions, see the *Oracle Hyperion Reporting and Analysis 9.3.3 Readme*.

c. Oracle's Hyperion® Financial Data Quality Management

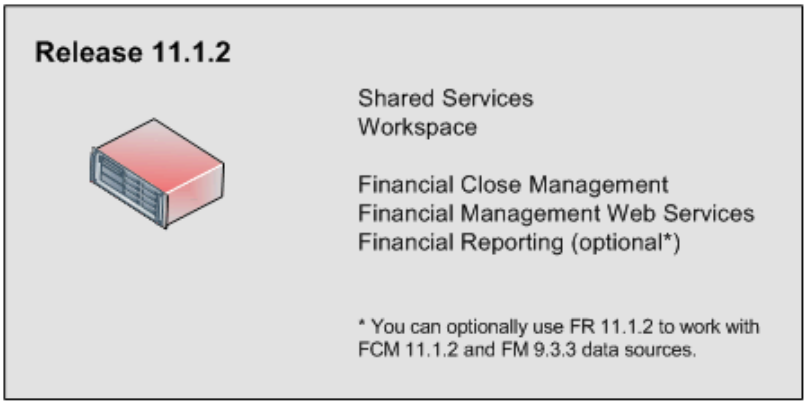
   i. Modify the 9.3.3 `FDMIntegrationTypes.xml` file according to the instructions provided with the file that you downloaded from MyOracleSupport.

   ii. Import the modified file into Financial Close Management following the instructions in the "Manage Integration Types" section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.

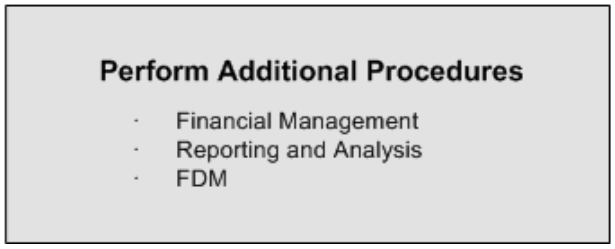
Using Release 9.3.3 Products With Financial Close Management 11.1.2



Step 2 – Install Separate Instance of Release 11.1.2 Products



Step 3



Additional Procedures for Financial Management

Complete these procedures in order to allow Financial Management to integrate with Financial Close Management.

Update the `HFMHitRegistry.xml` File

In your 11.1.2 environment, use a text editor to update the `HFMHitRegistry.xml` file in order to add the Financial Management ASP.NET Web Service and Financial Management Web Application nodes. For most properties, you can use the defaults if Financial Management is installed with default configuration. However, the following properties must be updated correctly.

Component	Value
FINANCIAL_MANAGEMENT_PRODUCT	<property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!—This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2 environment.
LOGICAL_WEB_APP:FINANCIAL_MANAGEMENT_WEB_APP	<property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!—This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2 environment.
	<property name="host" value="webserver9_3_3.oracle.com"/><!—This value should be the 9.3.3 Web server machine's name.
FINANCIAL_MANAGEMENT_WEB_APP	<property name="serverName" value="webserver9_3_3.oracle.com"/><!—This value should be the 9.3.3 Web server machine's name.
	<property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!—This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2 environment.
	<property name="InstallationDir" value="C:\Hyperion\FinancialManagement\Web\HFM"/><!—This should be the installation directory for the Financial Management 9.3.3 Web Server.
	<property name="FileTransferFolderPath" value="C:\Hyperion\FinancialManagement\Web\HFM\FileTransfer"/><!—Directory path to Financial Management FileTransfer folder.
LOGICAL_WEB_APP:FINANCIAL_MANAGEMENT_ASPNET_WEBSERVICE	<property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!—This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2 environment.
	<property name="host" value="webserver9_3_3.oracle.com"/><!—This value should be the 9.3.3 Web Server machine's name.
FINANCIAL_MANAGEMENT_ASPNET_WEBSERVICE	<property name="serverName" value="webserver9_3_3.oracle.com"/><!—This value should be the 9.3.3 Web Server machine's name.
	<property name="InstallationDir" value="C:\Hyperion\FinancialManagement\Web\HFMService"/><!—This is the installation directory for HFMApplicationService.

Component	Value
	<property name="FileTransferFolderPath" value="C:\Hyperion\FinancialManagement\Web\HFM\FileTransfer"/><!–Directory path to Financial Management FileTransfer folder.
	<property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!–This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2 environment.
Default Component	<property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!–This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2 environment.
	<property name=Clustered" value="0"/><!–Cluster ID of the server where oracle-epm-fm-webservices reside.
	<property name="host" value="webserver11_1_2.oracle.com"/><!–This value should be the 11.1.2 Web Server machine's name.
FINANCIAL_MANAGEMENT_WEBSERVICE	<property name="serverName" value="FMWebServices0"/><!–This is the server name in WebLogic Console for oracle-epm-fm-webservices.
	<property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!–This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2 environment.

Create Registry Tree With Updated HFMHitRegistry.xml File

This procedure is performed in your 11.1.2 environment in order to update the 11.1.2 Shared Services Registry so that it contains information about 9.3.3 Oracle's Hyperion® Financial Management – System 9.

In your 11.1.2 environment, follow these steps to create the Financial Management Registry Tree:

1. Copy the updated version of HFMHitRegistry.xml to %EPM_ORACLE_INSTANCE%\bin folder. The default location should be C:\Oracle\Middleware\user_projects\epmsystem1\bin.
2. Open a Command Prompt window (Select **Start**, then **Run**, type "cmd", then press **Enter**).
3. Navigate to the %EPM_ORACLE_INSTANCE%\bin folder. You can use these steps:
   a. If you installed EPM system on C Drive, type "C:" in the command prompt.
   b. Type "cd %EPM_ORACLE_INSTANCE%\bin" or "cd C:\Oracle\Middleware\user_projects\epmsystem1\bin".
4. Create the Financial Management Registry tree using the following command: epmsys_registry.bat createcomponenthierarchy HFMHitRegistryTree.xml.

Caution! The epmsys_registry.bat createcomponenthierarchy HFMHitRegistryTree.xml can only be run once in the environment. Any subsequent corrections need to be done by following the instructions to modify the Shared Services Registry in the *Oracle Hyperion Enterprise Performance Management Release 11.1.2 Installation and Configuration Guide*.

5. **Optional:** Check `epmsys_registry.bat` to see that the report lists System 9- 9.3.3.

Making Corrections to Shared Services Registry

If you made an error when updating the registry, you can use the update property command to edit the Shared Services Registry. See the "Updating the Shared Services Registry" section in the *Oracle Hyperion Enterprise Performance Management Release 11.1.2 Installation and Configuration Guide*.

If any property under `FINANCIAL_MANAGEMENT_WEB_APP` component needs to be updated, the corresponding property under `LOGICAL_WEB_APP:FINANCIAL_MANAGEMENT_WEB_APP` component also needs to be updated and vice versa. These components must be kept in synch. The same guidelines apply to the following pairs of components: `LOGICAL_WEB_APP:FINANCIAL_MANAGEMENT_ASPNET_WEBSERVICE` and `FINANCIAL_MANAGEMENT_ASPNET_WEBSERVICE`; `Default` and `FINANCIAL_MANAGEMENT_WEBSERVICE`.

Add Proxy Information to the Oracle HTTP Server Configuration

In your 11.1.2 environment, perform these changes on the machine running Foundation Service Oracle HTTP Server proxy server.

1. Add the following information to the end of the `httpd.conf` file located in `<ORACLE_MIDDLEWARE_HOME>\user_projects\epmsystem1\httpConfig\ohs\config\OHS\ohs_component`

   ```
   ProxyPass /hfm http://<HFM_WEB_SERVER>:80/hfm

   ProxyPassReverse /hfm http://<HFM_WEB_SERVER>:80/hfm
   ```

   Note: The proxy virtual directory name must be "hfm" or the same name as the HFM IIS virtual directory for HFM Web.

2. Restart the Oracle HTTP Server proxy server.

Verify the ASP.NET Version

In your 9.3.3 environment, ensure that the `HFMApplication Service` is using ASP.NET version 2.0.50727.

To verify the ASP.NET version:

1. Select **Start**, then **Run**, type `Inetmgr` and select **OK** to open Internet Information Services (IIS) Manager.
2. Under **Web Sites**, right-click on **HFMApplicationService** and select **Properties**.
3. Select the **ASP.NET** tab, and ensure that the ASP.NET version is 2.0.50727. If it is not currently selected, select it from the drop-down menu.

Import 9.3.3 HFM Integration XML file, `FMIntegrationTypes.xml` into Financial Close Management

You need to import the 9.3.3 version of the Financial Management Integration xml file, `FMIntegrationTypes.xml`, into 11.1.2.0.1 Financial Close Management. The `FMIntegrationTypes.xml` file is provided with Financial Management 9.3.3 and is located in the following directory: `C:\Hyperion\FinancialManagement\Integration\FCM` or on MyOracleSupport.

To import the integration file (`FMIntegrationTypes.xml`), see the *Oracle Hyperion Financial Close Management Administrator's Guide*.

Additional Procedures for Reporting and Analysis

Use this procedure to enable Financial Reporting 9.3.3 to work with Financial Close Management 11.1.2.

1. Modify the 9.3.3 `FRIntegrationTypes.xml` file according to the instructions provided with the patch that you downloaded from MyOracleSupport. This xml file contains all of the integration types and definitions associated with Oracle's Hyperion® Financial Reporting – System 9.
2. Import the modified `FRIntegrationTypes.xml` file into Financial Close Management following the instructions in the "Manage Integration Types" section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.
3. Optionally, if you want to access Financial Close Management 11.1.2 from Oracle Hyperion Workspace 9.3.3, follow the procedures in the *Oracle Hyperion Reporting and Analysis 9.3.3 Readme*.

Additional Procedures for FDM

Financial Close Management release 11.1.2 includes the ability to launch three specific FDM pages: Import, Multiload, and Journals. The XML file included with this patch is used when integrating Hyperion Financial Data Quality Management (FDM) Release 9.3.3.0 with Financial Close Management Release 11.1.2.

To integrate Hyperion Financial Data Quality Management (FDM) Release 9.3.3.0 with Financial Close Management Release 11.1.2, perform these steps:

1. Modify the 9.3.3 `FDMIntegrationTypes.xml` file according to the instructions provided with the patch that you downloaded from MyOracleSupport.
2. Import the modified `FDMIntegrationTypes.xml` file into Oracle Hyperion Financial Close Management following the instructions in the "Manage Integration Types" section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.

Index

A

Administration Services
  application server
    UNIX startup scripts, 88
    Windows service names, 88
  default ports, 53
  release compatibility, 44
  system requirements, 23
Apache Server, supported versions, 39
Application Builder J2EE, default ports, 59
Application Builder.NET, default ports, 60
assistive technologies
  system requirements, 18
    screen magnifier, 19
    screen reader, 19
authentication providers, system requirements, 16

B

BEA WebLogic, supported versions, 26, 30, 38

C

client
  OS, 18
  processor, 18
compatibility of releases, 43
configuration sequence, 65

D

Data Management
  default ports, 62
  release compatibility, 49
  repository passwords, 82
  system requirements, 39
Data Relationship Management
  default ports, 63
  default URLs, 96
  install/configuration tasks, 74
  release compatibility, 49
  repository passwords, 83
  system requirements, 39
  Windows service names, 95
database connectivity
  system requirements
    Essbase, 26
    JDBC, 26
    ODBC, 26
default URLs, 85
  Data Relationship Management, 96
  Financial Data Quality Management, 96
  Performance Scorecard, 96
  User Management Console, 96
  Workspace, 96
Disk space and RAM, 40
  client software, 20
  Essbase - System 9, 24
  Financial Performance Management Applications, 36
  Foundation Services, 16
  Reporting and Analysis, 28
  Shared Services, 16
Domino LDAP, supported versions, 16

E

epmsys_registry utility, 97
Essbase
  default ports, 53
  install/configuration tasks, 67
  release compatibility, 44
  system requirements, 23
  UNIX startup script, 87
  Windows service names, 87
Essbase - System 9
  default ports, 52

install/configuration tasks, 67
release compatibility, 44
system requirements, 23

F

FDM
default ports, 62
default URLs, 96
disk space requirements, 40
install/configuration tasks, 75
release compatibility, 49
system requirements, 39
Windows service names, 95
Financial Management
default ports, 60
install/configuration tasks, 72
release compatibility, 47
repository passwords, 81
system requirements, 35
Windows service names, 93
Financial Performance Management Applications
default ports, 60
release compatibility, 47
repository passwords, 80
system requirements, 35
Financial Reporting
application server
UNIX startup script, 92
Windows service names, 92
default ports, 57
install/configuration tasks, 73
release compatibility, 45
repository passwords, 79
system requirements, 27
UNIX startup script, 89
Windows service names, 89
Firefox, supported versions, 21
Foundation Services
default ports, 51
release compatibility, 43
repository passwords, 77
system requirements, 15

H

Hyperion
components, 9
overview, 9

I

IBM DB2 OLAP Server, supported versions, 33
IBM DB2, supported versions, 27, 30, 32, 37
IBM Directory Server, supported version, 16
IBM Tivoli Directory Server, supported version, 16
IBM WebSphere, supported versions, 26, 30, 38
Informix, supported versions, 33
installation
sequence, 65
Integration Services
release compatibility, 44
system requirements, 23
UNIX startup script, 88
Windows service names, 88
Interactive Reporting
default ports, 58
install/configuration tasks, 73
release compatibility, 45
system requirements, 27
UNIX startup script, 89
Windows service names, 89

J

Java application servers
Essbase - System 9, 25
Financial Performance Management Applications, 38
Reporting and Analysis, 30
Java browser plug-in
system requirements
32-bit, 21
64-bit, 21
Java Runtime Environment
system requirements, 21
32-bit, 22
64-bit, 22

L

Lightweight Directory Access Protocol (LDAP), 16

M

Microsoft Active Directory, supported version, 16
Microsoft IIS, supported versions, 31, 39

Microsoft Internet Explorer, supported versions, 21
Microsoft NTLM, supported version, 16
Microsoft SQL Server, supported versions, 25, 27, 30, 33, 37, 42
Microsoft Windows
  32-bit and 64–bit server, supported versions, 39
  32-bit server, supported versions, 28, 35
    Essbase — System 9, 23
  64-bit server, supported versions, 28
multiple release environment, 97

N

Netegrity SiteMinder, supported version, 16
Novell eDirectory, supported version, 16

O

OpenLDAP
  supported versions, 16
  UNIX startup script, 86
  Windows service name, 86
Oracle
  application server, supported versions, 26, 31, 38
  databases, supported versions, 25, 30, 32, 38, 42
Oracle Identity Management, supported version, 16
order of installation, 65

P

passwords, repository, 77
Performance Management Architect
  install/configuration tasks, 70, 72
  release compatibility, 47
Performance Scorecard
  application server
    UNIX startup script, 94
    Windows service names, 94
  default ports, 61
  default URLs, 96
  install/configuration tasks, 72
  release compatibility, 47
  repository passwords, 82
  system requirements, 35
Performance Scorecard Alerter
  application server
    UNIX startup script, 94
    Windows service names, 94
Planning
  application server
    UNIX startup script, 93
    Windows service names, 93
  default ports, 61
  install/configuration tasks, 70
  release compatibility, 47
  system requirements, 35
  upgrading in a mixed release environment, 102
ports
  Administration Services, 53
  Application Builder J2EE, 59
  Application Builder.NET, 60
  Data Management, 62
  Data Relationship Management, 63
  Essbase, 53
  Essbase - System 9, 52
  FDM, 62
  Financial Management, 60
  Financial Performance Management Applications, 60
  Financial Reporting, 57
  Interactive Reporting, 58
  Performance Scorecard, 61
  Planning, 61
  Provider Services, 54
  Reporting and Analysis, 55, 56
  Shared Services, 51
  Smart Search, 55
  Strategic Finance, 62
  Web Analysis, 58
  Workspace, 59
product groupings
  Foundation Services, 13
  Data Management, 14
  Essbase — System 9, 13
  Financial Performance Management Applications, 13
  Reporting and Analysis, 13
product installation sequence, 65
Provider Services
  application server
    UNIX startup script, 88
    Windows service names, 88
  default ports, 54
  release compatibility, 44
  system requirements, 23

R

Red Brick, supported versions, 33
Red Hat Linux
  32-bit server, supported versions, 24, 28
release compatibility, 43
Reporting and Analysis
  default ports, 55, 56
  install/configuration tasks, 73
  release compatibility, 45
  repository passwords, 78
  system requirements, 27
Reporting and Analysis Core Services
  UNIX startup script, 87
Reporting and Analysis Core Services
  Windows service name, 87
repository passwords, 77
  Administration Services, 78
  Data Management, 82
  Data Relationship Management, 83
  Financial Management, 81
  Financial Performance Management Applications, 80
  Financial Reporting, 79
  Performance Scorecard, 82
  Planning, 80
  Shared Services, 77
  Web Analysis, 79
  Workspace, 78
runtime clients, system requirements, 19

S

SAP Enterprise Portal, supported version, 17
SAP R/3, supported versions, 33
screen magnifier, system requirements, 19
screen reader, system requirements, 19
screen resolution, system requirements, 19
sequence, installation, 65
service names. *See* Windows service names
Shared Services
  application server
    UNIX startup script, 86
    Windows service names, 86
  default ports, 51
  install/configuration tasks, 66
  OpenLDAP
    UNIX startup script, 86
    Windows service name, 86
  release compatibility, 43
  system requirements, 16, 27
Shared Services Registry
  editing for a multiple release environment, 97
Smart Search
  default ports, 55
Solaris
  32-bit server, supported versions, 24, 28
  64-bit server, supported versions, 24
SQR Production Reporting
  install/configuration tasks, 73
  release compatibility, 45
  system requirements, 27
startup dependencies, 85
Strategic Finance
  default ports, 62
  install/configuration tasks, 74
  release compatibility, 47
  system requirements, 35
  Windows service names, 94
Sun Java Enterprise System, supported versions, 30
Sun One, supported version, 16
Sybase, supported versions, 34
system requirements, 13
  assistive technologies, 18
  client, 17
    Java Runtime environment, 21
    OS, 18
    other required third-party software, 22
    required Hyperion software, 18
    Web Browser, 21
    Web Browser plug-in, 21
  Data Management, 39
  database connectivity
    JDBC, 26
    ODBC, 26
  Essbase
    database connectivity, 26
    server OS/processor, 23
  Essbase - System 9, 23
  Financial Performance Management Applications, 35
    disk space and RAM, 36
    Java application servers, 38
    repository databases, 37
    required third-party software, 37
  Foundation Services, 15

Java application servers, 30
Java browser plug-in
32-bit, 21
64-bit, 21
Java Runtime Environment
32-bit, 22
64-bit, 22
processor, 18
Reporting and Analysis, 27, 28
runtime clients, 19
screen resolution, 19
Shared Services
disk space and RAM, 16
User Directories, 16
Windows clients
disk space and RAM, 20

T

Teradata, supported versions, 27, 34
third-party software requirements, 22
Translation Manager
third party requirements, 41

U

UNIX startup scripts, 85
Administration Services application server, 88
Financial Reporting, 89
Financial Reporting application server, 92
Interactive Reporting, 89
Performance Scorecard Alerter application server, 94
Performance Scorecard application server, 94
Planning application server, 93
Provider Services application server, 88
Reporting and Analysis Core Services, 87
Shared Services application server, 86
Shared Services OpenLDAP, 86
Web Analysis application server, 91
Web Analysis Web server, 90
Workspace application server, 91
upgrading
multiple release environment, 97
partial upgrade , 97
supported upgrade paths, 11
URLs, default, 85
User Directories, system requirements, 16
User Management Console
default URLs, 96
system requirements, 96
User Management Console
default URLs, 96

W

Web Analysis
application server
UNIX startup script, 91
Windows service names, 91
default ports, 58
install/configuration tasks, 73
release compatibility, 45
system requirements, 27
Web Analysis Web server
UNIX startup script, 90
Windows service names, 90
Web browser plug-in
system requirements, 21
Windows service names, 85
Administration Services application server, 88
Data Relationship Management, 95
Financial Data Quality Management, 95
Financial Management, 93
Financial Reporting, 89
Financial Reporting application server, 92
Interactive Reporting, 89
Performance Scorecard Alerter application server, 94
Performance Scorecard application server, 94
Planning application server, 93
Provider Services application server, 88
Reporting and Analysis Core Services, 87
Shared Services application server, 86
Shared Services OpenLDAP, 86
Strategic Finance, 94
Web Analysis application server, 91
Web Analysis Web server, 90
Workspace application server, 91
Workspace
application server
UNIX startup script, 91
Windows service names, 91
default ports, 59
default URLs, 96
install/configuration tasks, 73

system requirements, 27