

HYPERION
STRATEGIC FINANCE
RELEASE 9.2.1

INSTALLATION GUIDE

ORACLE | Hyperion

Hyperion Strategic Finance Release 9.2.1 Installation Guide

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Installation Overview

This guide describes the hardware and software requirements and installation procedures for installing Oracle's Hyperion® Strategic Finance.

For known issues and product updates, refer to the *Oracle's Hyperion® Strategic Finance Readme* file located on the Hyperion Solutions Web Site at [http:// www.hyperion.com](http://www.hyperion.com).

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Strategic Finance Overview

Strategic Finance enables the seamless integration and consolidation of financial forecasts and models among planning, business development, treasury, and investor relation groups within a company. This includes the interaction not only among corporate groups but also between business units and the corporate office. The result is significantly enhanced and more consistent communication, not only within the company, but to external constituents as well. Most importantly, Strategic Finance reduces the time and cost of completing the related planning activities while increasing the accuracy and robustness of the analytics.

Licensing

Beginning with this release, Hyperion® License Server™ and standalone license files are not used for license management. Instead, administrators need to audit product use. To ensure compliance with your license agreement, you need to edit a properties file to activate or deactivate features in accordance with what you have purchased.

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

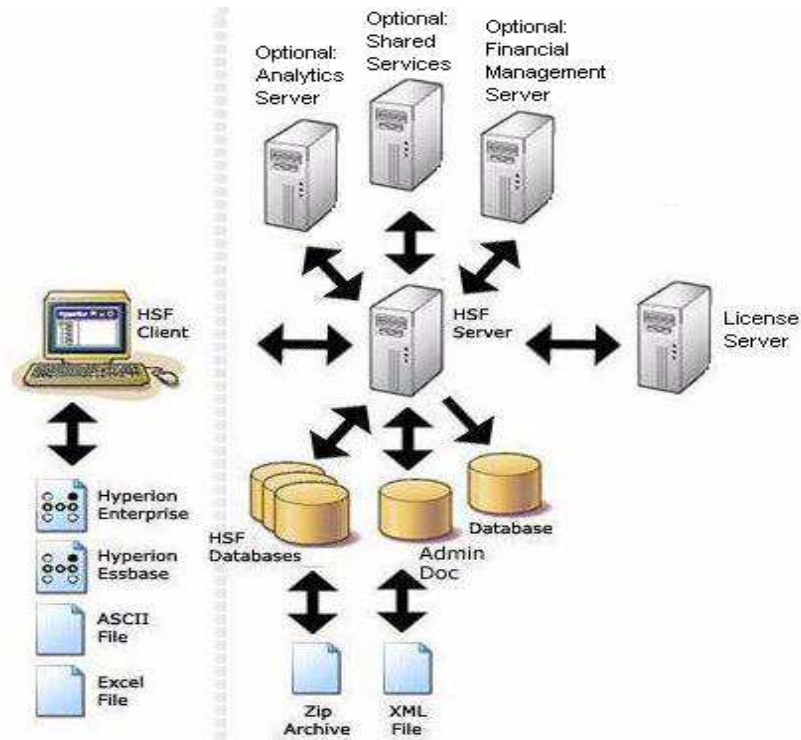
All products in release 9.2.1 (Data Integration Management excepted) support upgrades from 9.0.1x and 9.2. In addition, Strategic Finance supports upgrades from release 3.5.1 or later.

Architecture and Components

Strategic Finance can be installed as a stand-alone program, or as a Client-Server system. If the Strategic Finance program is set up to operate as a stand-alone program, all information will be stored locally. Financial models are created and stored as local files with an *.alc extension. The Strategic Finance Server is not installed, so the Administration utility is not used and the information in this guide does not pertain.

In a Client-Server system, many instances of the Strategic Finance program can be installed throughout a network, and all act as Clients connected to the Strategic Finance Server. The Server can manage multiple Strategic Finance databases. Data files (*.alc) that would be stored locally in a stand-alone implementation are here stored in the Strategic Finance Server and referred to as entities. A License Server is required to activate use of Strategic Finance.

Figure 1 Strategic Finance client-server architecture



The Administration utility is provided to control Client access to data on the Strategic Finance Server, as well as for use in performing administrative tasks on databases residing in the Server.

Client Tier

The Strategic Finance client is the main interface for working with entities. The client incorporates various features that were developed to ensure modeling with flexibility, yet structure and integrity.

Server Tier

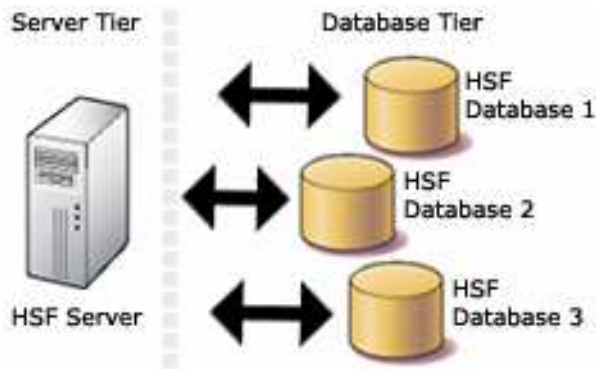
The Strategic Finance server contains databases and programs to manipulate them. The server also has the ability to run several administrator-controlled and automated processes such as the file conversion routines that ensure that all files on the server are of the same (and most current) version. Entity Change Management allows a power user to make sweeping changes to all or a defined group of Entities.

The server is a centrally-managed version control system. A user can check out entities on the client, which can be saved to a local hard drive for editing, (for example, at the office, at home, or on an airplane). Later, the user can check the entities back in to publish the changes in the Strategic Finance database. The server can be configured to keep a defined number of older archived versions of each Entity so that users can open them or refer to them on reports.

Database Tier

The database serves as a collective data store for groups of Entities. It is possible to copy, move, or archive Entities from or to a particular database as needed.

Figure 2 Database Tier



Staging Database

The staging database typically serves as an intermediary unit for storing data that is being exported to an external relational database (Oracle or SQL Server). It functions in a messaging capacity between the Strategic Finance Server and other external databases.

Extended Analytics Star Schema Database

Extended Analytics offers another option for exporting to an external database, one in the form of a star schema. The star schema design is optimized for reporting and for export into multidimensional Essbase Analytics databases.

HSF Administrator Utility

The HSF Administrator utility offers a comprehensive interface to manage centralized security and Access Control elements of the system. User rights, entity access, and group membership are all administered with this utility. Transaction and user access logs can be monitored as well.

The Initial Administrator

The initial administrator will have full access privileges throughout Strategic Finance. Immediately after installing the HSF Server, the first user ID used to access the Administrator utility by default becomes the initial administrator.

- For information on using Shared Services and the initial administrator, see [“Configuring the Initial Administrator User ID and HSF Access User ID”](#) on page 12.

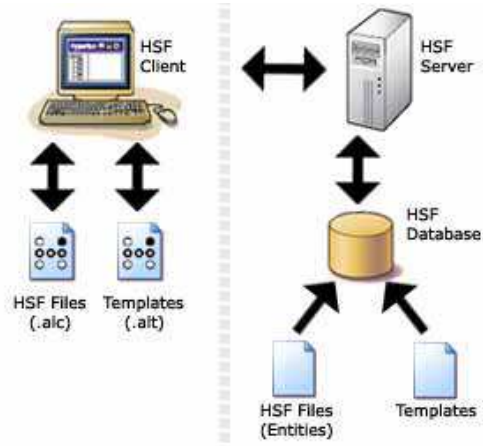
- For more information on accessing the Administrator utility immediately after installing the HSF Server, see [“Starting the HSF Administrator Utility” on page 68](#).

Templates and Entities

Templates are files that are frameworks from which entities are built; they form the basis for the files that are used in Strategic Finance.

Strategic Finance entities are structured files that can be checked out or saved to a local machine. These files form the primary mechanism for storing and manipulating data. They may be created locally as HSF (.alc) files, then checked in to the Strategic Finance server as entities.

Figure 3 Templates and Entities



Optional: Hyperion Shared Services

Shared Services (formerly called Hyperion Hub) functionality is programmed into products, such as Oracle's Hyperion® Planning – System 9, Oracle's Hyperion® Financial Management – System 9, and Hyperion Business Modeling. Shared Services integrates the products to provide the following functionality:

- User provisioning
- External authentication definition
- Metadata synchronization
- Data synchronization
- Task flow management

User provisioning functionality is described in the Hyperion System 9 Shared Services User Management Guide available on the Hyperion Download Center. External authentication definition is described in the Hyperion System 9 Shared Services Installation Guide available on the Hyperion Download Center. All other Shared Services functionality is described in the administrator's and user's guides for the products that implement Shared Services. Products that implement Shared Services functionality require access to a Shared Services server running Shared Services client and server software, and to a database dedicated to Shared Services.

For more information, see the following:

- [“Configuring External Authentication and User Provisioning with Hyperion Shared Services” on page 12](#)
- [“Configuring the Initial Administrator User ID and HSF Access User ID” on page 12](#)
- [“Hyperion Product Configuration Utility” on page 13](#)
- [“Hyperion Installation Start Here” on page 13](#)
- [“External Authentication” on page 13](#)

Configuring External Authentication and User Provisioning with Hyperion Shared Services

It is recommended that you use Hyperion Shared Services Configuration Console to manage external authentication for all Hyperion products. With Strategic Finance, this is required if you are using import and export with Essbase Analytics, Enterprise, Planning, and Financial Management. After you have configured Hyperion Shared Services for external authentication, you can configure other products that must use external authentication by referencing the Hyperion Shared Services configuration.

To implement Hyperion Shared Services functionality for Hyperion products or applications, each product requires access to a Hyperion Shared Services server running Hyperion Shared Services server software, and to a database dedicated to Hyperion Shared Services. See the *Hyperion Shared Services Installation Guide* for database options.

The *Hyperion Shared Services Installation Guide* provides workflow and configuration information to help you set up external authentication for Hyperion products. You can find this guide on your product CD or in the Strategic Finance Installation Documentation Zip file on the Hyperion Download Center.

Configuring the Initial Administrator User ID and HSF Access User ID

Before installing and configuring Strategic Finance for use with Shared Services, you must already have Shared Services installed. In Shared Services, you will need to add the following user IDs:

- The Initial Administrator user ID, or the user ID you use for installing the HSF Server and running the Administrator utility, which must be configured in Shared Services as a Provisioning Manager and Shared Services Administrator.
- The HSF Access, which you use in configuring and registering HSF with Shared Services, which must be in Shared Services as part of the native directory and configured as an Shared Services Administrator.

Hyperion Product Configuration Utility

The Configuration Utility simplifies configuring Hyperion products. The Configuration Utility displays configuration options for installed products and guides you through a series of screens to activate products, to register products with Shared Services, to configure relational databases as data sources, and to automatically deploy products to application servers. If your product has unique configuration requirements, additional options will be available to enable you to complete all your configuration tasks through use of the Configuration Utility.

Through use of the Configuration Utility, you can configure multiple products in a single session. You also can reconfigure Hyperion products after you have exited the Configuration Utility. The reconfiguration procedure is identical to the initial configuration process.

For details about the Configuration Utility and the product configuration file, see [Chapter 7, “Configuring and Setting Up Strategic Finance”](#).

Hyperion Installation Start Here

This document helps you to install and configure the latest release of Hyperion Business Performance Management products successfully. It provides an overview of the installation procedure and considerations to be aware of when you install multiple Hyperion products. Read this document first, before you install Hyperion Business Performance Management products.

External Authentication

External authentication is the ability of a user to access multiple Hyperion applications after logging on only once. When an externally authenticated user logs on to a Hyperion application, an encrypted token is generated which contains the user credentials in the form of:

- The user name
- In some cases, the user password. The presence of a password in the token depends on the configuration. If you are using a trusted authentication directory, no password is present or required in the token.

As shown in the following illustration, the token is passed among other Hyperion applications and is used as needed to automatically re-authenticate the user when the user moves to another application. Single sign-on is effective in cases where one Hyperion application launches another. Note that if a user launches a second application independently, for example, from the Start Menu, a token cannot be passed between the applications, and the user must re-authenticate.

Figure 4 Authentication to External Provider Enables Remote Authentication to Reach Multiple Applications



Tokens are encrypted; however, additional security such as Secure Sockets Layer (SSL) protocol is recommended for prevention of replay attacks or man-in-the-middle attacks.

To enable single sign-on between multiple Hyperion applications that launch one another, you must use a single Hyperion Shared Services configuration file that is shared by the multiple product installations.

About Hyperion Home

When multiple Hyperion products are installed on the same computer, common internal and third-party components used by the products are installed to a central location, called Hyperion Home. On Windows platforms, the Hyperion Home location is defined in the system environment variable called `HYPERION_HOME`. On UNIX, the Hyperion Home value is stored in `.hyperion.<hostname>` in the `/home` directory.

Hyperion Home Location

The Strategic Finance installer prompts you to define the location for Hyperion Home. The default location is `C:\Hyperion` for Windows and `$HOME/Hyperion` for UNIX. If the location has been previously defined for another Hyperion product, the installation uses that location and the Hyperion Home location cannot be changed through the installer. If this is the first Hyperion installation on the computer, and you have not already specified the location for Hyperion Home, you can specify the location during installation.

Changing the Hyperion Home Location

After Hyperion Home has been defined through any product installation, you must run two separate migration utilities to change the Hyperion Home location. The first utility moves the files installed in Hyperion Home to the new location, and the second utility fixes all internal references to the old Hyperion Home location. Both utilities are provided with the Strategic Finance installation.

► To change the Hyperion Home location:

1 Launch the first utility by executing the following file from the current Hyperion Home location:

Windows:

```
HYPERION_HOME\common\utilities\HyperionHomeTool\<>version>\bin\run.exe
```

UNIX:

```
HYPERION_HOME/common/utilities/HyperionHomeTool/<version>/bin/  
run.bin -console
```

The migration utility is launched.

2 Step through the screens, and when prompted, enter the new Hyperion Home location or click **Browse to navigate to the desired location.**

The migration utility copies the entire Hyperion Home directory to the new location and replaces the value of the current HYPERION_HOME environment variable.

For Windows, the utility updates the HYPERION_HOME environment variable. For UNIX, the utility updates the `.hyperion_<HOSTNAME>` file in the home directory containing the environment variable. Login initialization files, such as `.profile` and `.login` are not updated on UNIX systems.

3 Launch the second utility by executing the following file from the installation location:

Windows:

```
AASPATH\migrationutility\bin\MigrationUtility.exe
```

UNIX:

```
AASPATH/migrationutility/bin/MigrationUtility.bin -console
```

The migration utility is launched.

4 Step through the screens, and when prompted, enter both the new and old Hyperion Home locations, or click **Browse to navigate to the desired locations.**

5 When prompted, confirm or correct the current locations of installed Hyperion products.

The migration utility first creates a backup of all files that contain references to Hyperion Home. Then the utility opens the files, searches for the old Hyperion Home location, replaces all references with the new Hyperion Home location, and saves the files. The last screen of the utility lists the files that were changed.



Strategic Finance Installation Sequence

This chapter provides the following information about installing, configuring, and setting up Strategic Finance:

- High-level task flow that identifies basic steps
- Installation checklist to guide you through each step in the installation and configuration process

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Start Here

The following table lists the high-level steps required to install and configure multiple Hyperion System 9 products. **Review these steps first**, before you begin the installation process. For detailed information, refer to the component user interface and related documentation listed next to each step. Following these steps in the sequence listed will help to ensure trouble-free installation of all Hyperion products.

Table 1

Step	Instruction	Product Component	Documentation
1	Obtain product license from Hyperion Download Center, install and set up Hyperion License Server™, and copy license file to: HYPERION_HOME\common\ LicenseServer\Licenses	License Server setup program	<i>Shared Services Installation Guide</i>
2	Install Hyperion System 9 Shared Services™ and configure the Shared Services application server and RDBMS.	Shared Services installer Hyperion Configuration Utility™	<i>Shared Services Installation Guide</i>
3	Configure Shared Services to authenticate user names that are stored externally in LDAP, Active Directory, or Windows NT LAN Manager, enabling single sign-on.	Shared Services External Authentication Configuration Console	<i>Shared Services Installation Guide</i>
4	Install Hyperion System 9 products.	Hyperion System 9 product installers	Product installation guides
5	Activate and configure Hyperion products and register them with Shared Services. You can configure multiple products at one time, if they are installed on the same computer.	Hyperion Configuration Utility	Product installation guides
6	Create projects, add applications to projects, and provision users for applications.	Shared Services User Management Console™	Shared Services User Management Guide

Installation Checklist

This checklist contains steps required for a successful installation of Strategic Finance. Page numbers refer to the Strategic Finance Installation Guide unless otherwise noted. If you are upgrading, see [Chapter 4, “Upgrading to Strategic Finance Release 9.2.1”](#).

Before you begin the installation process, ensure that you meet the hardware and software system requirements contained in [Chapter 3, “Planning the Installation”](#).

Table 2

	SET UP HYPERION LICENSE SERVER	REFERENCE
	<ol style="list-style-type: none">1. Obtain product licenses and download Hyperion License Server software from the Hyperion Download Center.2. Install Hyperion License server.3. Install your license file. <p>Note: Keep your Deployment ID information available.</p>	Hyperion System 9 Shared Services Installation Guide
	INSTALL SHARED SERVICES AND CONFIGURE THE SHARED SERVICES APPLICATION SERVER AND RDBMS	REFERENCE
	<ol style="list-style-type: none">1. Ensure that the database you are using for Shared Services is installed and operational before installing Shared Services.2. Download Shared Services software and documentation from the Hyperion Download Center.3. Install Shared Services and configure the Shared Services Application server and RDBMS.	Hyperion System 9 Shared Services Installation Guide
	CONFIGURE THE SHARED SERVICES EXTERNAL AUTHENTICATION PROVIDER	REFERENCE

Table 2

	<p>Ensure that your Shared Services server is up and running.</p> <p>Note: Shared Services is required for single sign-on, user provisioning, and for use with other Hyperion products. It is optional for stand-alone Strategic Finance implementations. If this is this first time you have implemented with Shared Services, you should now configure Shared Services.</p> <ol style="list-style-type: none"> Using Shared Services, configure the External Authentication Provider that you want to use: <ul style="list-style-type: none"> Windows NT LAN Manager (NTLM) Lightweight Directory Access Protocol (LDAP) Microsoft Active Directory (MSAD) <p>Shared Services writes your configuration information to a central XML-based security configuration file that is generated by Shared Services. Strategic Finance references the security configuration file for single sign-on of external and remote users.</p> <ol style="list-style-type: none"> Set up the environment and user rights for NT LAN Manager support. Optionally, set up the environment for Netegrity Single Sign-on, configure Shared Services to use Single Socket Layers, and install the Hyperion Remote Authentication Module. 	<p>Hyperion System 9 Shared Services Installation Guide</p>
	<p>SET UP THE HSF ACCESS USER ID IN SHARED SERVICES</p>	<p>REFERENCE</p>
	<p>Create the HSF access user ID in Shared Services. Add a user to Shared Services under the native directory, then set it up as a Shared Services Administrator.</p>	<p>“Registering Products with Shared Services” on page 54</p> <p>Hyperion System 9 Shared Services User Management Guide</p>
	<p>Strategic Finance SERVER TIER – INSTALLATION TASKS</p>	<p>REFERENCE</p>
	<ol style="list-style-type: none"> Log on to the HSF server computer using the Initial Administrator ID. <p>Note: If you are using Shared Services, the Initial Administrator ID does not need to beconfigured in Shared Services.</p> <ol style="list-style-type: none"> Install the Strategic Finance server. Verify HSFSservice. <p>Note: If you are integrating with other Hyperion products, you will need to ensure you are installing the correct components. See “Prerequisites for Interoperation” on page 28.</p>	<p>“Installing the Server” on page 40</p> <p>“Verifying the HSFSservice Installation” on page 43</p>
	<p>STRATEGIC FINANCE CLIENT TIER—INSTALLATION TASKS</p>	<p>REFERENCE</p>
	<p>Install the Strategic Finance client.</p> <p>Note: If you are integrating with other Hyperion products, you will need to ensure you are installing the correct components. See “Prerequisites for Interoperation” on page 28.</p>	<p>“Installing the Client” on page 46</p>
	<p>CONFIGURATION TASKS</p>	<p>REFERENCE</p>

Table 2

	<p>Activate and configure Strategic Finance and register with Shared Services using the Hyperion Configuration Utility.</p> <ul style="list-style-type: none"> ● Activate Strategic Finance. ● Specify the Shared Services server location. ● Register the Strategic Finance server with Shared Services. ● If you have an existing Strategic Finance user base, migrate those users to Shared Services. <p>Note: The License server and Shared Services server must be up and running to perform this step, and the Initial Administrator ID must already be set up as a user in Shared Services.</p>	<p>“Launching the Configuration Utility” on page 51</p> <p>“Activating Product Licenses” on page 52</p> <p>“Registering Products with Shared Services” on page 54</p> <p>“Deregistering Products with Shared Services” on page 58</p> <p>“Migrating Existing Strategic Finance Users to Shared Services” on page 59</p>
	<p>POST-CONFIGURATION TASKS</p>	<p>REFERENCE</p>
	<p>Connect the Strategic Finance client to the Strategic Finance server.</p>	<p>“Connecting a Client to a Strategic Finance Server and Database” on page 72</p>
	<p>ASSIGN ROLES FOR SHARED SERVICES USER MANAGEMENT AND PROVISION USERS</p>	<p>REFERENCE</p>
	<p>A Shared Services administrator must perform the following tasks:</p> <ul style="list-style-type: none"> ● Assign the Project Manager role to users who are responsible for creating projects and assigning applications to projects. ● For each application, assign the Provisioning Manger role to users who are responsible for assigning roles and access control permissions to users of the application. ● Assign the Directory Manager role to users who are responsible for managing the native Shared Services directory. <p>Project Managers can now create projects and add applications to projects as necessary. Provisioning Managers for each application can now provision users and groups (assign roles and access control permissions) for their applications.</p>	<p>Hyperion System 9 Shared Services User Management Guide</p>
	<p>INSTALLATION OF ADDITIONAL COMPONENTS</p>	<p>REFERENCE</p>
	<p>If you are using Extended Analytics, install Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, and Web Analysis modules.</p>	<p>Hyperion System 9 BI+ Financial Reporting Module Installation Guide</p>

3

Planning the Installation

This chapter contains issues for consideration prior to installation, such as system requirements and security.

Subsequent maintenance releases and service packs for third-party platform software may be used where the vendor asserts backward compatibility. Please be aware, however, that although these assertions are made in good faith, certain incompatibilities may exist. In the event that an incompatibility is identified, Hyperion may experience a delay in reproducing and fixing resultant issues for the affected versions.

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Hardware and Software Requirements

The requirements for the client and server hardware depend in part on how a company plans to use Strategic Finance.

Entity Size

The typical Strategic Finance deployment produces entities of about 2 to 5 MB. Some deployments require more detail in the entity and produce files of about 5 to 10 MB. In that case, the company should raise their use class one level, for example, a company with a medium use configuration should advance to one for heavy use. Some deployments require a very high level of detail in the Strategic Finance entity and push the file size up above 10 MB. In these cases, a heavy use configuration should be considered.

Client Workstation Requirements

Throughout this section, prerequisites for the client are based on the capacity for use as follows:

- Light use means that the user edits individual entities either locally or checked out from the server, or runs consolidation locally (not on the Strategic Finance server) for structures containing fewer than 15 entities.
- Medium use means that in addition to editing entities, the user runs consolidation locally for structures containing fewer than 50 entities.
- Heavy use relates to running consolidation locally for structures containing more than 50 entities.

All Implementations

The following table lists the client workstation configuration requirements and recommendations for all implementations of Strategic Finance.

Table 3 Client Workstation Requirements

Client Component	Requirements
Disk space	180 MB (typical) to 210 MB (custom, all features) for program files, plus additional space for data
Operating system	<ul style="list-style-type: none">● Windows 2000 Professional (Service Pack 4)● Windows 2003 Server (Service Pack 1)● Windows 2000 Pro (client)● Windows XP Professional (client)● Windows Vista (client)
Monitors	Recommended: 800 x 600 minimum resolution

Table 3 Client Workstation Requirements (*Continued*)

Client Component	Requirements
Third-Party Software	<ul style="list-style-type: none"> Internet Explorer 6.0 / 7.0 Adobe Acrobat Reader 5.0 or higher
Application export	Excel 2000, 2002, or 2003

Light Use

The following table lists the configuration requirements and recommendations for light use of Strategic Finance.

Table 4 Light Use Client Workstation Requirements

Client Component	Requirements
Processor	Minimum - 800 MHz Recommended - 2 GHz
RAM	Minimum - 256 MB RAM Recommended - 512 MB RAM or more

Heavy Use

The following table lists the client workstation configuration requirements and recommendations for heavy use of Strategic Finance.

Table 5 Heavy Use Client Workstation Requirements

Client Component	Requirements
Processor	Minimum - 1 GHz Recommended - 3.2 GHz
RAM	Minimum - 512 MB RAM Recommended - 1 GB or more

Server Requirements

Caution! Do not install the Strategic Finance ..\HSFData folder in a file share directory on a remote server or in an NAS (Network Attached Storage) area. The ..\HSFData folder should be installed either on a local hard drive or SAN (Storage Area Network array).

Throughout this section, prerequisites for the server are based on the capacity for use as follows:

- Light use is defined as having fewer than 50 users who connect to the server to check entities in and out, or run server-based consolidation for structures containing fewer than 15 entities.
- Medium use means that between 50 and 100 users connect to the Strategic Finance server to check entities in and out or run server-based consolidation for structures containing less than 50 entities.
- Heavy use means that 100 users or more connect to the server to check entities in and out or run server-based consolidation for structures containing more than 50 entities.

Server Requirements for All Implementations

The following table lists the server configuration requirements and recommendations for all implementations of Strategic Finance Server.

Table 6 Server Requirements for All Implementations

Component	Requirements
Operating system	<ul style="list-style-type: none"> ● Windows 2000 Server (Service Pack 4) ● Windows 2003 Server (Service Pack 1)
Disk space	<ul style="list-style-type: none"> ● Small - 170 MB (typical) to 250 MB (custom, all features) mirrored or RAID-protected area for the operating system and server files. ● Large - RAID-protected storage area for the actual data files. Can be directly attached disk drives or a SAN array. ● Sufficient storage should be included to hold the actual Entities, their backup Archives, an area for administrative and transaction files, and user background task logs such as Consolidation reports.
Relational database export	<p>Optional - A separate database server is recommended for the Strategic Finance staging tables. This release of Strategic Finance supports export to the following:</p> <ul style="list-style-type: none"> ● Microsoft SQL Server 2000 (sp3a) and 2005 (sp1) on supported Windows server platforms. ● Oracle 9i -9.2.0.5 / 10g - 10.1.0.5 / 10g R2 10.2.0.2 on these platforms: <ul style="list-style-type: none"> ○ Supported Windows server platforms ○ Solaris 9 / 10 ○ AIX 5.2 / 5.3 ● MDAC 2.8 is required for both Oracle and SQL Server
Database backup	PKZip 8.0 Command Line Version

Light Use

The following table lists the server configuration requirements and recommendations for light use of Strategic Finance Server.

Table 7 Light Use Server Requirements

Component	Requirements
Processor	Minimum - 1 GHz Recommended - Dual 2.8 GHz
RAM	Minimum - 1 GB Recommended - 2 GB or more

Heavy Use

The following table lists server configuration requirements and recommendations for heavy use of Strategic Finance Server.

Consolidation is very processor and RAM-intensive. If you plan on running more than one large server-based consolidation at a time, consult Hyperion as to the optimal number of processors your server should contain.

Table 8 Heavy Use Server Requirement

Component	Requirements
Processor	Minimum - Dual or Quad 2.8 GHz Note: Add one processor and 512 MB RAM per 100 active users.
RAM	Minimum - 1 GB Recommended - 2 GB or more

Integration with Other Hyperion Products

Strategic Finance can be installed with optional software components to support export capabilities with the following Hyperion products:

- Oracle's Hyperion® Essbase® – System 9
- Oracle's Hyperion® Planning – System 9
- Oracle's Hyperion® Financial Management – System 9
- Oracle's Hyperion® Essbase® – System 9
- Oracle's Hyperion® Enterprise®

Caution! In order to ensure data integrity and system robustness, it is recommended that you install the Strategic Finance server software on its own machine.

Prerequisites for Interoperation

Before Strategic Finance can be used with other Hyperion products, it must be installed and configured to use the following prerequisites:



Prerequisites

Oracle's Hyperion® Shared Services

For more information about Shared Services and License Manager, see the following:

- For information on installing Shared Services and License Manager, refer to the *Hyperion System 9 Shared Services Installation Guide*.
- For information on user provisioning with Shared Services, refer to the *Hyperion System 9 Shared Services User Management Guide*.

With Financial Management

There are two forms of integrating with Financial Management: standard and batch.

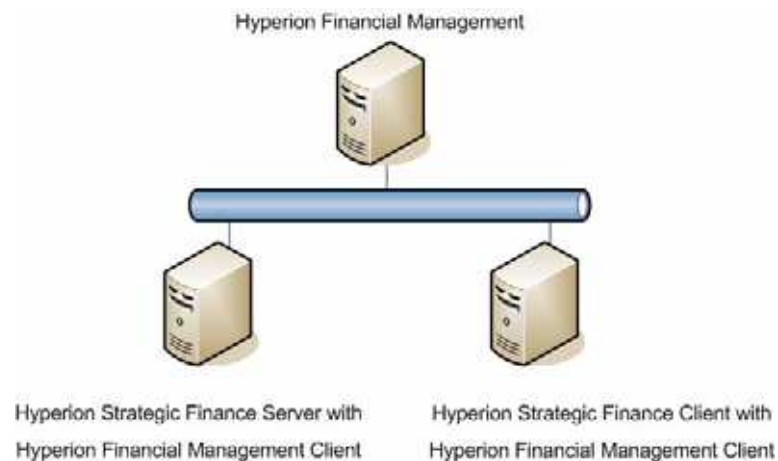
Standard Export

Standard exporting is directly between the Strategic Finance Client and a Financial Management implementation, does not require the server, and supports export only:

Product	Prerequisites
Strategic Finance Client	One of the following versions of Hyperion Financial Management must be installed on the same computer as the Strategic Finance Client: <ul style="list-style-type: none"> ● Release 4.1.x.x/9.0.5.x /9.2.x.x Client

Batch Import and Export

For importing and exporting between Strategic Finance and Financial Management, the following is required, in addition to the prerequisites list in [“Prerequisites for Interoperation” on page 28.](#)



Product	Prerequisites
Strategic Finance Server	One of the following versions of Financial Management must be installed on the same computer as the Strategic Finance Server: <ul style="list-style-type: none"> ● Release 4.1.x/9.0.5.x/9.2.x.x Client ● Single Sign-on must be configured
Strategic Finance Client	One of the following versions of Financial Management must be installed on the same computer as the Strategic Finance Client: <ul style="list-style-type: none"> ● Release 4.1.x.x/9.0.5.x/9.2.x.x Client

With Essbase Essbase or Planning

You can integrate with Essbase or Planning in two ways: standard and batch.

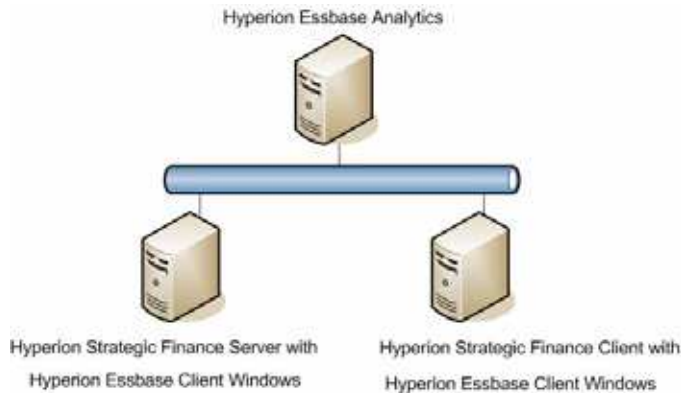
Standard Export

Standard exporting is directly with the Strategic Finance Client, does not require the server, and supports export only:

Product	Prerequisites
Strategic Finance Client	One of the following must be installed with the Strategic Finance Client: <ul style="list-style-type: none"> ● Essbase Release 7.1.x.x Client/Runtime Client Windows ● Essbase Release 9.2.x.x Client/Runtime Client Windows

Batch Import and Export

For importing and exporting between Strategic Finance and Essbase or Planning, the following is required, in addition to the prerequisites list in [“Prerequisites for Interoperation” on page 28](#):



Product	Prerequisites
Strategic Finance Server	One of the following must be installed on the same computer as the Strategic Finance Server: <ul style="list-style-type: none"> ● Essbase Release 7.1.x.x Client/Runtime Client Windows ● Essbase Release 9.2.x.x Client/Runtime Client Windows ● Single Sign-on must be configured
Strategic Finance Client	One of the following must be installed on the same computer as the Strategic Finance Client: <ul style="list-style-type: none"> ● Essbase Release 7.1.x.x Client/Runtime Client Windows ● Essbase Release 9.2.x.x Client/Runtime Client Windows

With Enterprise

There are two forms of integration with Enterprise: standard and batch.

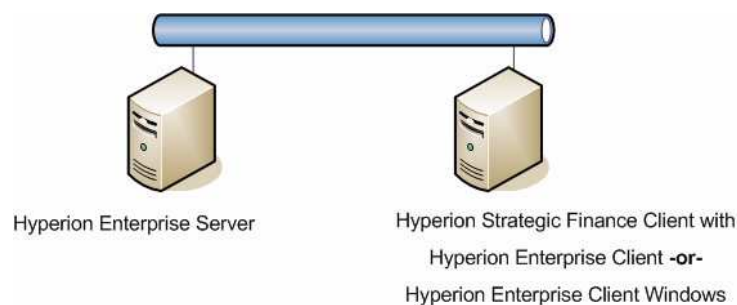
Standard Export

Standard exporting is directly between the Strategic Finance Client and an Enterprise implementation, does not require the server, and supports export only:

Product	Prerequisites
Client export: Strategic Finance Client	One of the following must be installed on the same computer as the Strategic Finance Client: <ul style="list-style-type: none"> ● Hyperion Enterprise Release 6.3.1/6.4 Client ● Hyperion Enterprise Release 6.3.1/6.4 Client Windows

Batch Import and Export

For batch importing and exporting between Strategic Finance and Enterprise, the following is required, in addition to the prerequisites list in [“Prerequisites for Interoperation” on page 28](#):



Product	Prerequisites
Batch import/export: Strategic Finance Server	One of the following must be installed on the same computer as the Strategic Finance Server: <ul style="list-style-type: none"> ● Enterprise Release 6.4/6.4.1 Client ● Enterprise Release 6.4/6.4.1 Client Windows ● Single Sign-on must be configured
Client export: Strategic Finance Client	One of the following must be installed on the same computer as the Strategic Finance Client: <ul style="list-style-type: none"> ● Enterprise Release 6.4/6.4.1 Client ● Enterprise Release 6.4/6.4.1 Client Windows

With Extended Analytics

For using Strategic Finance with Extended Analytics, the following is required, in addition to the prerequisites list in [“Prerequisites for Interoperation”](#) on page 28:

Hyperion System 9 BI+ Module	Star Schema Database	Hyperion Essbase Analytics Release 9.x.x.x with Hyperion Analytic Integration Release 9.x.x.x
Hyperion Interactive Reporting Release 9.x.x.x	Yes	Yes
Hyperion Smart View for Office Release 9.x.x.x	No	Yes
Hyperion Financial Reporting Release 9.x.x.x	No	Yes
Hyperion Web Analysis Release 9.x.x.x	Yes	Yes
		Note: Extended Analytics exports to a relational database only. From the relational database, use Hyperion Analytic Integration Services to export to Essbase.

Compatibility with International Keyboards

Strategic Finance is compatible with the following keyboard layouts:

Table 9 Compatible Keyboard Layouts

U.S. - English
Chinese Bopomofo IME
Chinese ChaiJei IME
French
German
Italian
Japanese Hiragana
Korean
Russian
Spanish



Upgrading to Strategic Finance Release 9.2.1

This chapter contains procedures for upgrading to the latest release of Strategic Finance if you have a previously installed version, and how to convert data.

In This Chapter	Upgrading to Release 9.2.1	34
	Installing the Upgrade	37

Upgrading to Release 9.2.1

Before you perform the upgrade, ensure that all entities in the server have been checked in. After upgrading, files are automatically converted to the new format you opened. You must save the newly converted file for the changes to take effect.

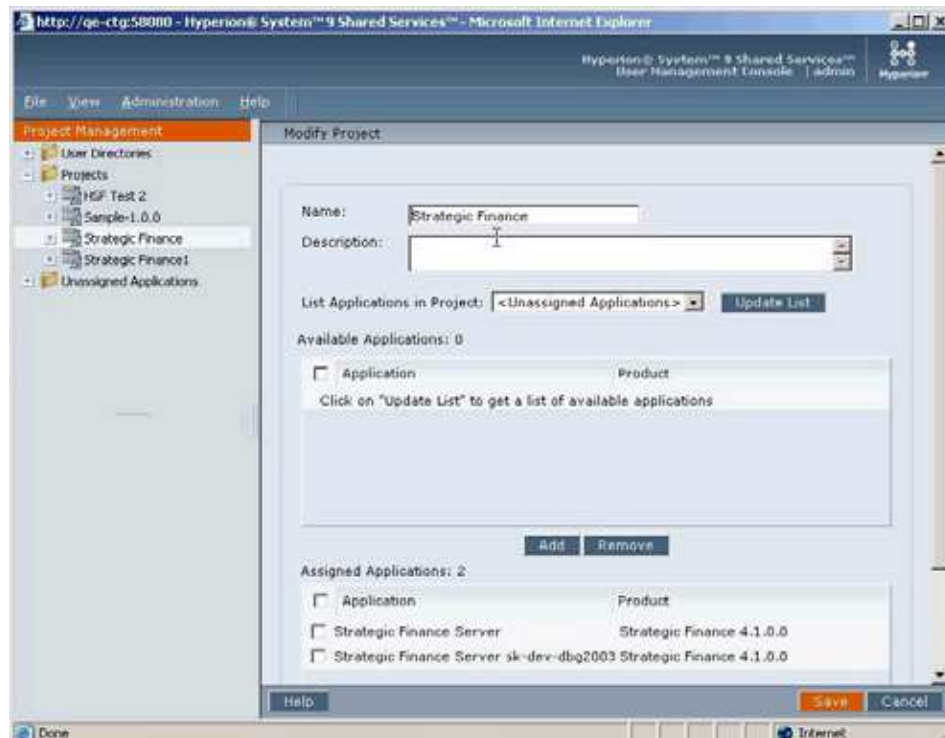
Caution! Hyperion recommends that you do a complete backup of your entire Strategic Finance or Alcar production environment before upgrading. You can then revert to the previous release, if necessary. At a minimum, you must create a backup of the data directory (on the server, \HSFData or \AlcarData), or of all your individual Strategic Finance files (stand-alone client).

Note: It is best practice to create a test environment, where you install the upgraded software in an environment other than production. This enables you to convert some test data to ensure data integrity. Once testing has ensured a stable environment, the environment can be moved into production, or you can convert the production environment.

Changing the Strategic Finance Project Name in Shared Services

Before doing anything, you must change the Strategic Finance project name in Shared Services.

- ▶ To change the Strategic Finance project name:
 - 1 Access the Shared Services User Management Console.
 - 2 Select the Strategic Finance project.
 - 3 Next to **Name**, change 'HSF x.x.x.x' to 'Strategic Finance'.



4 Click **Save**.

Considerations When Upgrading Customized Systems

If you have custom client-defined fields or any custom conversion programs, you must store these in a separate directory before you remove the previous release of the software. Copy any custom files to the program directories of the client and server after you install the new release, and before you start either the client or the server in order to get those customizations into the new release.

When the upgraded client or server is started for the first time, it requires all custom client-defined fields and custom conversion programs so it can add these customizations to the new system and convert data properly. If the client or server starts without these files, your customizations will not be added to the new system.

Customized files that you need to copy to the program directory include the following:

- any specialized .coa files
For example: <your company>.coa
- currdata.dat
- consdata.dat
- convert.idx

Considerations for Scenario Handling in the Consolidator

Consider the following issues regarding consolidation structures when converting from versions of Strategic Finance previous to release 9.2.x.x:

- If different entities in a consolidation structure contribute different scenarios to the consolidated file, then the scenario used for that entity during the last consolidation run will be the setting carried over into the upgrade.
- If an entity is set to use the <Current> scenario, Strategic Finance will use the scenario currently selected in the entity as the setting carried over into the upgrade.
- If you have a consolidation structure relying on the 'Use scenario in all children' feature to create variations on a scenario based on switching the scenario in the consolidated file, then only the last used variation of that consolidation structure will be carried over into the upgrade. The others can easily be recreated by selecting the 'Use scenario in all children' option in the new system then changing the target scenario in the consolidated file.

Considerations for Archive Repair

Consider the following issues regarding archive repair when converting from versions of Strategic Finance previous to release 4.1.x.x. Consult Hyperion support for additional information about the following issues:

- The Administration utility has an Archive Repair feature to fix archive numbers.
- When you open an archive of an entity, the new release contains an archive version check to ensure that the version number is correct for the archive. By default, this archive check is enabled.
- When the archive check finds that the archive and the number version are out of sync, by default you cannot open the archive until the Archive Repair feature has been run.
- When you run Archive Repair on an archived entity, the proper version numbers are restored and the archive is stored under a new filename.
- Because the repaired data is stored under a new filename, there are cases where you may not want to repair the archive. For example, if you have FreeStyle Reports that use the Alias Manager to reference specific archived entities, those references may break if you run the Archive Repair. They may break because the fixed archive data is stored under a new filename different from the one referenced by the Alias Manager.

In such a case, you have two choices:

- If you repair the archives, you must open the FreeStyle Report and manually change the Alias Manager to reference the new filename of the repaired archives.
- If you decide not to repair the archives, you can use them as they exist in order keep your existing FreeStyle Reports.
- If you do not repair an archive, use the **ArchiveWarningLevel** registry entry to override the archive check.

Open Regedit and access the following:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Hyperion Solutions\HSFService
```

You can set the ArchiveWarningLevel registry entry to one of the following settings:

- **Silent** - Overrides the archive check, enabling the use of out-of-sync archives.
 - **Warn** - Enables the use of out-of-sync archives, but when a user opens one, a message is written to the event log.
 - **Block** – Default. When a user tries to open an out-of-sync archive, the system displays a warning message and blocks the use of the archive.
- Because the Archive Repair changes the filename of the archive data, the audit point may be deleted if you purge the archives prior to running the Archive Repair.
- If you have a backup system, you can perform the following steps to restore the audit points:
- 1 Delete the existing archives.
 - 2 Restore the previous archives from the backup. If you maintain backups incrementally, restore the previous archives going as far back as you require.
 - 3 Open the Administrator utility and run the Archive Repair feature on the restored archives.
 - 4 Open the archives and check to ensure that the audit points are correct, then run a purge.

Installing the Upgrade

This section details the procedures to follow when installing the latest release.

Note: For information about installing the Strategic Finance client or server components, see [Chapter 5, “Server Installation”](#) or [Chapter 6, “Client Installation”](#).

Upgrading a Stand-Alone Client

If you are using the Strategic Finance client as a stand-alone program, data conversion is simple. After the software is installed, open your existing .a1c files in the new release of Strategic Finance, and the program will automatically convert your data to the upgraded format. You then save the converted file.

- To upgrade the Strategic Finance client:
- 1 Uninstall the client. For instructions, see [Chapter 9, “Uninstalling Strategic Finance”](#).
 - 2 Install the new Strategic Finance client software. For instructions, see [Chapter 6, “Client Installation”](#).
- To convert Strategic Finance files:
- 1 Select **Start > Programs > Hyperion Solutions > Strategic Finance > Strategic Finance**.
 - 2 From the Strategic Finance client, select **File > Open**.
 - 3 In the **Open** dialog box, click **Browse** to find and open the .a1c file.
 - 4 Click **Open**.

- 5 Save the file.

Upgrading the Client-Server Implementation

If you point the upgraded Strategic Finance server to an existing database during the installation wizard, it automatically converts that database upon first startup.

Caution! On some early versions of the server, the Admin Doc file has the name `user.adm`. When upgrading to Strategic Finance 9.2.x.x, change the filename of `user.adm` to `users.adm` before installing and running the new server. After you uninstall the previous version of the server and install the latest version, you may find two files: `user.adm` and `users.adm`. Delete the existing `users.adm`, then rename `user.adm` to `users.adm`. Do not install the HSF Service until you have renamed this file.

Upgrading the Server

- To install the Strategic Finance server:
 - 1 Uninstall the existing server from the previous release. For instructions, see [Chapter 9, “Uninstalling Strategic Finance”](#)
 - 2 Install the new server software. For instructions, see [Chapter 5, “Server Installation”](#). When installing, ensure that the target data directory is where you will put `\HSFData`, and reboot.
 - 3 Shut down `HSFService` in the newly-installed release.
 - 4 Save a copy of the license file found in `\HSFData\Admin`
 - 5 Delete (or rename) the newly-created `\HSFData` directory
 - 6 Copy in the existing `\HSFData` to where the new one was created.
 - 7 Copy the new license file into `HSFData\Admin`. It is recommended you rename the file as `HSF.lic`.
 - 8 Start `HSFService`. You will need to wait a while until the new server has converted the access records, then you should be able to log in.

Note: If your existing Strategic Finance database uses the default directory (`.. \HSFData`), the installation automatically points the server to that directory. If your existing database uses another directory (for example, `.. \AlcarData`), you will need to point the server to that directory. This can be done with the installation wizard.

Upgrading the Client

- To install the upgraded client:
 - 1 Uninstall the client. For instructions, see [Chapter 9, “Uninstalling Strategic Finance”](#).
 - 2 Install the new Strategic Finance client software. For instructions, see [Chapter 6, “Client Installation”](#).



Server Installation

This chapter contains procedures for installing the Strategic Finance Server, including the HSF Administrator application.

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	Verifying the HSFSservice Installation	43
	Configuring the Server	43

Installing the Server

This section guides you through installing the server. When entering filepaths and filenames throughout this procedure, you can enter only English alphanumeric characters and these special characters:

- dash (-)
- underscore (_)
- plus sign (+)
- backslash (\)
- forward slash (/)
- dot (.)
- colon (:)

The colon character (:) is supported only for Windows platforms to specify the drive (for example, c:\).

► To install the Strategic Finance Server:

- 1 From the download directory or install CD, run **Setup.exe**.
- 2 From the **Welcome** dialog box, click **Next**.
- 3 Select a country and click **Next**.
- 4 To accept the license agreement, select **I AGREE** and click **Next**.
- 5 Under **Directory Name**, enter a filepath for the server and click **Next**.

Default:

C:\Hyperion\StrategicFinance\Server

- 6 Under **Hyperion Home Directory**, enter a filepath for common Hyperion files and click **Next**.

Default:

C:\Hyperion

- 7 Under **Directory for Server Data Files**, enter a filepath data files and click **Next**.

Default:

C:\HSFData

Caution! Do not install the Strategic Finance `..\HSFData` folder in a file share directory on a remote server or in an NAS (Network Attached Storage) area. The `..\HSFData` folder should be installed either on a local hard drive or SAN (Storage Area Network array).

- 8 **Optional:** If you are using Shared Services, select **Yes** when prompted **Hyperion Shared Services registration required** and click **Next**. If not, select **No**.

9 Select a setup type, then click Next.

- Select **Typical** (default), and the standard server components will be installed. The installation will begin once you click **Next**.
- Select **Custom** then click **Next**, and the installer will prompt you to select the additional features to install.

10 Optional: If you have selected a Custom setup, you must also select the check box next to each additional feature and click Next.

Additional features include:

- **Hyperion Configuration Utility <release>**

This option includes a utility for configuring Shared Services.

- **Strategic Finance Server <release>**

This option includes the standard server components.

- **Administrator Desktop Icon**

This option installs an icon for starting the Administrator utility from the Windows desktop.

- **Database Export**

This option includes all export database options: SQL Server and Oracle.

- **Microsoft SQL Server 2000**

This option includes the build and update scripts for an export database in SQL Server.

- **Oracle 9i/10g**

This option includes the build and update scripts for an export database in Oracle.

- **Hyperion Planning/Essbase Integration**

This option includes the components required for import and export with Planning and Essbase.

- **Hyperion Financial Management Integration**

This option includes the components required for import and export with Financial Management.

- **Hyperion Enterprise Integration**

This option includes the components required for import and export with Hyperion Enterprise.

11 Verify the summary to ensure that you have the correct information and click Next.

The installer displays the progress of the installation.

12 Click Next.

13 Optional: When prompted Launch Config Tool automatically, select Yes, then click OK.

- If you select Yes, see [Chapter 7, “Configuring and Setting Up Strategic Finance”](#).
- If you select No, continue to the next step.

- 14 You must restart your computer after installation. Select whether to restart your computer now or later, then click **Finish**.

Once the software has been installed and the computer has been rebooted, the Strategic Finance service should be running. Check the service to ensure the server installation.

- 15 You must now configure Strategic Finance. See [Chapter 7, “Configuring and Setting Up Strategic Finance”](#).

Verifying the HSFSservice Installation

- ▶ To check the Strategic Finance Service after restarting the computer:
 - 1 From the Windows desktop, select **Start > Control Panel > Administrative Tools > Services**.
 - 2 In the Services utility, check the **HSFSservice** to see that it has been added to the system and that it is running.
 - 3 **Optional:** If it has not been installed, run `service-install.bat`. This file is stored in the following default location:

```
<drive>:\Hyperion\Strategic Finance\4.1\Server\service-install.bat
```
 - 4 **Optional:** In the Services utility, right-click on **HSFSservice** and select **Start**.

Configuring the Server

Before you install the Strategic Finance client, you should configure the Strategic Finance server. See [Chapter 7, “Configuring and Setting Up Strategic Finance”](#).



Client Installation

This section contains procedures for installing the Strategic Finance client.

In This Chapter	Installing the Client	46
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Installing the Client

This section guides you through installing the client. When entering filepaths and filenames throughout this procedure, you can enter only English alphanumeric characters and these special characters:

- dash (-)
- underscore (_)
- plus sign (+)
- backslash (\)
- forward slash (/)
- dot (.)
- colon (:)

The colon character (:) is supported only for Windows platforms to specify the drive (for example, c:\).

► To install the Strategic Finance client:

- 1 From the download directory or install CD, run **setup.exe**.
- 2 From **Welcome**, click **Next**.
- 3 Select a country from and click **Next**.
- 4 To accept the license agreement, select **I AGREE** and click **Next**.
- 5 Under **Directory Name**, enter filepath to install the client files and click **Next**.

Default:

```
C:\Hyperion\StrategicFinance\Client
```

- 6 Under **Hyperion Home Directory**, enter a filepath for common Hyperion files and click **Next**.

Default:

```
C:\Hyperion
```

- 7 Select a setup type and click **Next**.

- Select **Typical** (default) and the standard client components will be installed. The installation wizard will ask you to verify the options when you click **Next**.
- Select **Custom** and click **Next**, and the installer will prompt you to select the additional features to install.

- 8 **Optional:** If you have selected a **Custom** setup, you must also select the desired features. Select the check box next to each additional feature to install and click **Next**.

- Strategic Finance Client

This option includes the standard client components.

- Strategic Finance Client
 - Desktop Icon

This option includes an icon to start the Strategic Finance client from the desktop.

- **Hyperion Planning / Essbase Integration**

This option includes the components required for export to Planning and Essbase. The Essbase client must be installed and configured before Strategic Finance can be installed with this option.

- **Hyperion Financial Management Integration**

This option includes the components required for import and export to Financial Management.

- **Hyperion Enterprise Integration**

This option includes the components required for export to Hyperion Enterprise. The Enterprise client must be installed and configured before Strategic Finance can be installed with this option.

- **Server Administration Tool**

This option includes the HSF Administration product.

- **Admin Desktop Icon**

This option installs an icon for starting the Administrator utility from the Windows desktop.

9 Verify the summary to ensure that you have the correct information, then click Next.

The installer displays the progress of the installation.

10 When the installation is complete, click Finish.

11 Select Yes, restart my computer and click Finish to reboot your computer.

Note: If you are implementing the system with Shared Services, refer to [“Configuring and Setting Up Strategic Finance” on page 49](#).

7

Configuring and Setting Up Strategic Finance

This chapter describes how to configure Hyperion products using the Hyperion Configuration Utility™. It provides instructions for activating products, registering with Hyperion System 9 Shared Services™, configuring a relational database, deploying products on an application server, and performing product-specific configuration.

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	Registering Products with Shared Services	54
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	Deploying Products to Application Servers	56
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	Configuring Strategic Finance for Shared Services	59
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Hyperion Configuration Utility

The Configuration Utility is a common tool used to configure installed Hyperion products. This utility is installed with the first product installed on a machine, and you can use it to configure all products that are installed on that machine. You must run the Configuration Utility on each machine to which a product is installed.

The Configuration Utility provides the appropriate set of configuration tasks for the products installed on the machine:

- **Product Activation**—Required for all products, except for product components that are optionally included with Base Solutions products (for example, Hyperion System 9 Analytic Integration Services™, which is optionally included with Hyperion System 9 Analytic Services™). See [“Activating Product Licenses” on page 52](#).
- **Shared Services Registration**—Required for all products. See [“Registering Products with Shared Services” on page 54](#).
- **Relational Storage Configuration**—Required for products that use a database to store and retrieve data. See [“Configuring Relational Storage” on page 54](#).
- **Application Server Deployment**—Required for products that deploy on an application server. See [“Deploying Products to Application Servers” on page 56](#).
- **Shared Services Deregistration**—For registered products, required to deregister from Shared Services before uninstalling the product. See [“Customizing Strategic Finance with Shared Services” on page 58](#).

Product-specific configuration tasks may also be provided.

You can use the Configuration Utility to perform configuration tasks sequentially for multiple products in one session. The sequence of Configuration Utility pages depends on your product and task selections. As a troubleshooting measure, perform configuration tasks individually for one product at a time.

You can reconfigure products after the initial configuration, following the same procedures.

Prerequisites

Complete these tasks before using the Configuration Utility:

- Obtain a valid license for each product.
- Install and start Hyperion License Server™, and copy the license file to:
HYPERION_HOME\common\LicenseServer\Licenses
- Install, configure, and start the Shared Services server.
- Install the application server that you plan to use.
- Prepare a database to use for relational storage.
- Install Hyperion products.

Task Sequence

When performing multiple configuration tasks in one session, the Configuration Utility orders the tasks for you. If you use the Configuration Utility to perform tasks individually, follow this order:

- Product activation
- Shared Services registration
- Database configuration
- Application server deployment

Some products may require a different configuration order.

Configuring Product Upgrades

You can use the Configuration Utility to configure products that are upgraded from the previous release. The Configuration Utility determines whether the products installed on the machine are new or upgraded. The product selection page indicates which products were specified as upgrades during the product installation process.

All configuration tasks are available for upgraded products; however, if an upgraded product is configured for a relational database, the database configuration page is read-only except for the password. You can configure only one upgraded product at a time because each product may be configured for a different database. Similarly, you cannot configure new products and upgraded products simultaneously.

If you are upgrading Shared Services and products, upgrade Shared Services first. You must activate upgraded products and reregister them with Shared Services.

Note: The Configuration Utility is backward compatible with the previous System 9 releases and can be used to configure products for that release.

Launching the Configuration Utility

You must run the Configuration Utility on each machine to which a product is installed. The utility can be launched from a product installer or independently.

► To launch the Configuration Utility:

1 Choose a method:

- On the last page of a product installer, select the option to launch the Configuration Utility.
- On Windows, choose a method:
 - From **Start**, select **Programs > Hyperion System 9 Foundation > Configuration Utility**.

- Double-click the configtool.bat file from:
 \HYPERION_HOME\common\config\
- From a Windows console, change to this directory:
 \HYPERION_HOME\common\config\
 Then type:
 startconfigtool.bat -console
- On UNIX, choose a method:
 - In XWindows, change to this directory:
 \$HYPERION_HOME/common/config/
 Then type:
 configtool.sh
 - In a UNIX console, change to this directory:
 \$HYPERION_HOME/common/config/
 Then type:
 configtool.sh -console

Note: If you are running the Configuration Utility in console mode, follow the command-line prompts.

2 On the welcome page, click Next.

3 From the list of installed products, select those to configure and click Next.

A list of configuration tasks is displayed.

4 Follow the instructions for configuration tasks, as appropriate for the selected products:

- [“Activating Product Licenses” on page 52](#)
- [“Registering Products with Shared Services” on page 54](#)
- [“Configuring Relational Storage” on page 54](#)
- [“Deploying Products to Application Servers” on page 56](#)
- [“Customizing Strategic Finance with Shared Services” on page 58](#)
- [“Configuring Strategic Finance for Shared Services” on page 59](#)
- [“Migrating Existing Strategic Finance Users to Shared Services” on page 59](#)

Activating Product Licenses

License agreement terms are tracked and managed by a separately installed component called Hyperion License Server. The License Server ensures that your product usage capacity and license usage is consistent with purchased options and conforms to maintenance agreement terms.

Note: Some Hyperion products use a stand-alone license to activate the product rather than License Server.

During product activation, you provide the server name of the License Server host. The License Server must be installed and a temporary or permanent license file must be copied to the License Server before beginning product activation. (For details on installing and setting up the License Server, see the *Shared Services Installation Guide*.)

The Configuration Utility validates the license file and activates the product. If problems occur when connecting to the License Server or validating the license, activation fails and the Configuration Utility displays a warning message.

Note: Ensure that the License Server is started before activating products. Successful product activation is required before registering with Shared Services.

► To activate products:

1 Launch the Configuration Utility.

See “[Launching the Configuration Utility](#)” on page 51.

2 From the list of installed products, select those to configure and click Next.

The product activation page is displayed.

3 Specify License Server information:

Table 10 License Server Fields

Server	Enter the computer name (host name) where the License Server is installed.
Port	Enter the License Server port number. If you edited the product license file to specify the License Server port number, enter that port number. (For details, see Chapter 4 of the <i>Shared Services Installation Guide</i> .) You can accept the default value (Default) that is displayed, which enables the License Server to choose an available port (between 27000 and 27009) automatically.
Product	Displays the name of each product being configured and its install location. This field cannot be changed.
Deployment ID	For each product listed, enter the Deployment ID. To enter multiple deployment IDs, enter each ID separated by a comma. You must supply a valid Deployment ID for each product. To find the deployment ID, open the license file in a text editor and search for DEPLOYMENT_ID. For more information about deployment IDs, see the <i>Shared Services Installation Guide</i>

4 Click Next to go to the next configuration task or to finish.

Registering Products with Shared Services

Shared Services functionality is programmed into Hyperion products to enable user provisioning, single-sign on, and metadata management.

Products that implement Shared Services functionality require access to the Shared Services server and to a database dedicated to Shared Services. Registering with Shared Services enables a product to implement the required information in the Shared Services server by creating a registration file under its corresponding product directory in Shared Services.

► To register products with Shared Services:

1 Launch the Configuration Utility.

See [“Launching the Configuration Utility” on page 51.](#)

2 From the list of installed products, select those to configure and click Next.

3 If you have not activated the products, activate them.

See [“Activating Product Licenses” on page 52.](#)

4 Select Shared Services Registration.

5 Optional: Select HSF Shared Services Custom Panel.

If you select this option, see [“Customizing Strategic Finance with Shared Services” on page 58.](#)

6 Specify Shared Services server information:

Table 11 Shared Services Server Fields

Server	Enter the computer name (host name) where Shared Services server is installed. Do not specify an IP address for the server, especially in DHCP environments.
Port	Enter the Shared Services server port number, or accept the default (58080).
User	Enter the username of the Shared Services Administrator.
Password	Enter the password for the Shared Services Administrator.
SSL	Select this checkbox if you are using Secure Sockets Layer (SSL).

7 Click Next to go to the next configuration task or to finish.

Configuring Relational Storage

When you configure products to use a database, the Configuration Utility checks for connectivity to the database and ensures that the database is a supported database type.

If errors occur during a multiple-product configuration, terminating configuration for a particular product does not terminate the entire process. Configuration continues for the other products. The Configuration Utility displays error messages on a summary page after the configuration process completes.

For a list of supported databases for this release, see [Chapter 3, “Planning the Installation”](#).

► To configure a database:

1 Launch the Configuration Utility.

See [“Launching the Configuration Utility” on page 51](#).

2 From the list of installed products, select those to configure and click **Next.**

3 If you have not activated the products, activate them.

See [“Activating Product Licenses” on page 52](#).

4 On the task selection page, select **Relational Storage Configuration and click **Next**.**

5 From the list of supported databases, select the database and click **Next.**

The relational storage configuration details page is displayed.

Note: If you are configuring a product upgrade, the fields on this page are read-only except for the password.

6 Specify database information:

Table 12 Database Configuration Fields

Server	Enter the computer name of the server hosting the database.
Port	Specify the server port number on which the database listens, or accept the default port: <ul style="list-style-type: none"> ● DB2–50000 ● Oracle–1521 ● SQL Server–1433 ● MySQL–3306
Product	Displays the name of each product being configured and its install location. This field cannot be changed.
Database or SID (Oracle only)	Enter the database name or the Oracle System Identification (database instance). If an existing database is detected, you may be prompted to re-use the database or create a new one. <p>CAUTION! For DB2 and Oracle, the name must be entered in uppercase (for example, DBNAME).</p>
Username	Enter the name of the database owner.
Password	Enter the password of the database owner.

7 Click **Next to view configuration status.**

- 8 Click **Next** to go to the next configuration task or to finish.

Deploying Products to Application Servers

The Configuration Utility enables you to deploy multiple Hyperion products to the same application server. The application server must be installed on the same machine as the products you are deploying.

To view the list of supported application servers for this release, see [Chapter 3, “Planning the Installation”](#).

Caution! On UNIX platforms, if you are using IBM WebSphere application server, use the same account to install, deploy, and execute Hyperion System 9 products that you use to install WebSphere. Using the same account ensures that products are deployed successfully.

- To deploy products to an application server:
 - 1 **Launch the Configuration Utility.**
See [“Launching the Configuration Utility” on page 51](#).
 - 2 **From the list of installed products, select those to configure and click **Next**.**
 - 3 **If you have not activated the products, activate them.**
See [“Activating Product Licenses” on page 52](#).
 - 4 **On the task selection page, select **Application Server Deployment** and click **Next**.**
 - 5 **From the list of supported application servers, select the application server and click **Next**.**
A page specific to the selected application server is displayed.
 - 6 **Specify application server information:**

Table 13 Application Server Configuration Fields

Location	<p>Enter the path to the application server directory, or browse to the directory.</p> <p>For example:</p> <ul style="list-style-type: none"> ● For WebSphere Base— <code>c:\WebSphere\AppServer</code> on Windows or <code>/opt/WebSphere/AppServer</code> on UNIX ● For WebSphere Express— <code>c:\IBM\WebSphere\Express51\AppServer</code> on Windows or <code>/opt/IBM/WebSphere/Express51/AppServer</code> on UNIX ● For WebLogic— <code>c:\bea\weblogic81</code> on Windows or <code>/opt/bea/weblogic81</code> on UNIX <p>Note: For WebSphere, the Configuration Utility verifies that the specified WebSphere directory and the WebSphere temporary directory are set with Write permission. Write permission must be assigned before running the Configuration Utility.</p>
BEA Home (WebLogic only)	<p>For WebLogic, enter the path to the BEA Home directory (for example, <code>c:\bea</code> for Windows or <code>/opt/bea</code> for UNIX), or browse to and select the location.</p>
Username and Password (WebLogic only)	<p>Enter your WebLogic username and password.</p>
Deploy as service	<p>Select this checkbox if you want to deploy as a manual Windows service.</p> <p>In the Windows service control panel, the service name is listed as: Hyperion <Product> <AppServer><Version#></p> <p>For example, for WebSphere: Hyperion SharedServices9 WAS51</p>
Manual Deployment	<p>Select this checkbox to manually deploy products to the application server. The Configuration Utility creates the necessary Web archives (EAR or WAR) to enable manual deployment at a future time.</p>
Component	<p>Displays the name of each product or component being configured. This field cannot be changed. For example, if you are configuring Hyperion System 9 BI+™, Intelligence and Web Analysis components may appear in this column. For products such as Hyperion System 9 Analytic Administration Services™, the product name appears as the component.</p>
ServerName	<p>Enter the name of the server where you can access the deployed product. You can enter only English alphanumeric characters and the dash character (-).</p>

Table 13 Application Server Configuration Fields

Port	<p>If you want to change the default port number that was set during installation, specify a different port number here. Otherwise, accept the default port number. The port number must not exceed 65535. Hyperion recommends using a port number greater than 1025 to avoid conflicts with third-party port assignments.</p> <p>Each application port number must be unique. For a list of default port numbers, see <add a cross-reference to "Port Numbers Used by Hyperion Products" in the Planning the Installation chapter>.</p>
Domain (WebLogic only)	<p>Enter the name of the domain where you can access the deployed product. You can enter only English alphanumeric characters.</p>

Note: On WebLogic and Apache Tomcat, if you chose to deploy products automatically rather than manually, the Configuration Utility checks server disk space when starting deployment to ensure that the size of the EAR or WAR file (as specified in the product configuration file) is available for deployment. If the Configuration Utility indicates the available disk space is inadequate, you must specify a different location for storage of the EAR or WAR files in the product configuration file and then repeat the automatic deployment process.

Note: On WebSphere, if you chose to deploy products automatically rather than manually, the Configuration Utility checks server disk space for the `java.io.tmpdir` folder when starting deployment to ensure that at least four times the size of the EAR or WAR file (as specified in your product configuration file) is available for deployment. If the available disk space on the server is inadequate, the Configuration Utility relocates the `java.io.tmpdir` file to the `HYPERION_HOME\temp` directory (`HYPERION_HOME/temp` directory for UNIX). After deployment is completed, the folder is automatically deleted.

- 7 Click **Next** to view configuration status.
- 8 Click **Next** to go to the next configuration task or to finish.

Customizing Strategic Finance with Shared Services

If you are upgrading from Strategic Finance 4.1 to 4.1.1, make sure the HSF Server Instance ID here is the same used in the 4.1 installation.

- To Strategic Finance with Shared Services:
 - 1 In **HSF Server Application name**, enter the name of the Strategic Finance server.
 - 2 In **HSF Server Instance ID**, enter the name of the server instance.
 - 3 Click **Next**.

Deregistering Products with Shared Services

If you need to uninstall a Hyperion product after installation and configuration, and if the product is registered with Shared Services, first deregister the product before uninstalling it.

► To deregister products with Shared Services:

1 **Launch the Configuration Utility.**

See “[Launching the Configuration Utility](#)” on page 51.

2 **From the list of installed products, select those to configure and click Next.**

3 **On the task selection page, select **Shared Services Deregistration** and click Next.**

On the Shared Services location page, the Server, Port, and User fields display the information that was specified when the product was registered with Shared Services.

4 **In the **Password** text box, enter the password for the specified Shared Services user.**

5 **Click Next to go to the next configuration task or to finish.**

Configuring Strategic Finance for Shared Services

This setting will take effect for all databases within the currently selected server.

Note: Before you can perform this task, the user ID under which you are installing must be set up as a Provisioning Manager and Administrator in Shared Services. See the Hyperion System 9 Shared Service User Management Guide for information.

► To change server settings:

1 **To start the Administrator utility, from the Windows desktop select **Start > Programs > Hyperion System 9 Applications+ > Strategic Finance > Server > Server Administrator**.**

2 **From the menu bar, select **Server > Settings**.**

3 **Select the **General** tab.**

4 **In the **Security Mechanism** text box, select the **External Authentication** option from the drop-down list.**

For use with Shared Services.

Note: You must restart HSFSservice for these changes to take effect.

5 **Click **OK** when finished.**

6 **Close the Administrator utility and restart HSFSservice from the Services control panel.**

Migrating Existing Strategic Finance Users to Shared Services

If this is the first time you have configured Strategic Finance for use with Shared Services, you must migrate the users and user groups from Strategic Finance.

Note: Before you can perform this task, you must go to Shared Services and set up the user ID you are using for the installation as a Provisioning Manager and Administrator. Refer to the *Hyperion System 9 Shared Services User Management Guide*.

Caution! Once you have migrated from Standard NTLM to Shared Services, you cannot revert to Standard NTLM. From this point forward, your implementation will rely on Shared Services for user provisioning.

➤ To migrate existing Strategic Finance users to Shared Services:

- 1 From the Windows desktop select **Start > Programs > Hyperion Solutions > Strategic Finance > Server > Server Administrator**.
- 2 If you are using Shared Services, when Administrator utility prompts to ask if you wish to start migrating Strategic Finance users and user group to the new Shared Service management console, click **OK**.
- 3 In the **Users** dialog box, select an option from the **Migration Action** column for each user in Strategic Finance to define how each will be migrated, then click **OK**.

For each user, the table lists the following information:

- The **Name** column lists the name of the user ID as it exists in Strategic Finance.
- The **User ID** column lists the name of the user ID as it exists in the Standard NTLM Provider.
- The **New Shared Services ID** column lists the name of the user ID as it exists in Shared Services. This column will be empty if the user does not yet exist in Shared Services.
- The **Role** column lists the user role as assigned in Strategic Finance and as it will be transferred into Shared Services.
- The **Status** column indicates if the user ID has been located or not.
- The **Migration Action** column enables you to define how each user will be migrated.

If a user does not exist in an external directory (NTLM, MSAD, or LDAP), select one of the following options:

- The **Create Native User** option will create a new user ID in an external directory and migrate the user ID over.

If a user currently exists in Shared Services, select one of the following options:

- The **Map to Existing User** option will migrate the Strategic Finance user over to the corresponding user ID in an external directory.
- The **Don't Migrate** option will not copy the user to Shared Services.

- 4 In the **User Groups** dialog box, select an option from the **Migration Action** column and the **Role** column for each user group in the **Name** column to define how each will be migrated, then click **Finish**.

For each user group, the table lists the following information:

- The **Name** column lists the name of the user group as it exists in Strategic Finance.

- The **Shared Services Name** column lists the name of the user group as it exists in Shared Services. This column will be empty if the user does not yet exist in Shared Services.
- The **Role** column enables you to define how each user will be migrated:
 - The ? option.
- The **Migration Action** column enables you to define how each user will be migrated. If a user group does not exist in Shared Services, select one of the following options:
 - The **Create Native Group** option will create a new user group in Shared Services and migrate the user group over.
 If a user group currently exists in Shared Services, select one of the following options:
 - The **Merge** option will merge the Strategic Finance user group with the corresponding user group in Shared Services.
 - The **Don't Migrate** option will not copy the user group to Shared Services.

Once users and user groups have been migrated from Strategic Finance to Shared Services, the **Users** tab of the Administrator utility will no longer be displayed, as all related functionality has been moved over to Shared Services. To verify, you can check the log file that automatically displays when the migration is complete.

Reconfiguration

The Configuration Utility enables you to reconfigure Hyperion products multiple times. Reconfiguration procedures are identical to the initial configuration procedures. Launch the Configuration Utility, select the products to reconfigure, and repeat the procedures. Select the options that you want to change and follow the prompts to enter the required information.

Product activation is not required when you reconfigure.

Configuration Troubleshooting

Because the Configuration Utility separates configuration from product installation, the task of tracking and correcting configuration errors is simplified. The Configuration Utility logs configuration errors and warning messages to a log file, `configtool.log`, in a central location:

- Windows: `%HYPERION_HOME%\common\config\logs`
- UNIX: `$HYPERION_HOME/common/config/logs`

If you experience problems with configuration, as a troubleshooting measure, perform configuration tasks individually for one product at a time.



Post-Installation Tasks

This chapter contains procedures done after installing the software in order to complete the Strategic Finance installation.

In This Chapter	Verifying Startup Dependencies	64
	Starting License Server	64
	Starting Shared Services	66
	Setting up a Server and Database	68
	Connecting a Client to a Strategic Finance Server and Database	72
	Installing PKZip® (Optional) for Database Backup and Restore	74

Verifying Startup Dependencies

Before starting Strategic Finance, you must verify that these dependent software components are running:

Component	How to Verify Successful Startup	How to Start
Hyperion License Server™	On the License Server computer, run the lmstat utility from a command line, or use the lmtools interface to run lmstat. For more information, see Shared Services Installation Guide.	See “Starting License Server” on page 64 .
Hyperion System 9 Shared Services™ server	On the Shared Services server computer, look for confirmation messages in the server console window or launch User Management Console. See “Verifying Successful Startup of Shared Services” on page 67 .	See “Starting Shared Services” on page 66 .

Starting License Server

On Windows, License Server is installed as an automatic service by default so it starts when the computer on which it is installed starts. If you must start License Server manually, instructions are provided next for Windows and UNIX platforms.

Starting License Server Manually on Windows

You can start License Server manually on Windows using these methods:

- From the Start menu
 - From the command line
 - As a service, even if it is not installed as a service
- To start License Server, select **Start > Programs > Hyperion System 9 Foundation > Hyperion License Server > Start License Server**.
- To start License Server from the command line, use the command, `lmgrd -c`.
- If you want to start License Server with specific license file(s), use the following example as a guide:

```
C:\HYPERION\common\LicenseServer>lmgrd -c \  
C:\HYPERION\common\LicenseServer\Licenses\License_file_name
```
 - If you want to specify the directory containing the license file(s) (recommended), use the following example as a guide:

```
C:\HYPERION\common\LicenseServer>lmgrd -c \  
C:\HYPERION\common\LicenseServer\Licenses
```


Note: Hyperion recommends you do not specify a license file when starting License Server so you can add license files later without stopping and restarting License Server. Use `lmreread` to start using a license file while License Server is running. For information about `lmreread`, see Chapter 7 of the *FLEXnet Licensing End User Guide*, “License Server Tools.”

► To run License Server in the foreground, use the `-z` flag.

- If you want to run License Server in the foreground with specific license file(s), use the following example as a guide:

```
C:\HYPERION\common\LicenseServer>lmgrd -c.\licenses -z \  
C:\HYPERION\common\LicenseServer\Licenses\<License_file_name>
```

- If you want to run License Server in the foreground while specifying the directory containing the license file(s) (recommended), use the following example as a guide:

```
C:\HYPERION\common\LicenseServer>lmgrd -c.\licenses -z \  
C:\HYPERION\common\LicenseServer\Licenses
```

Starting License Server Manually on UNIX

On UNIX, License Server is not installed as a daemon by default, so you must start it manually if you choose the default option. You can start License Server manually on UNIX only by using the command line.

► To start License Server from the command line use the command, `lmgrd -c`.

- If you want to start License Server with specific license file(s), use the following example as a guide:

```
$HYPERION_HOME/common/LicenseServer/lmgrd -c \  
$HYPERION_HOME/common/LicenseServer/Licences/<License_file_name>
```

- If you want to specify the directory containing the license file(s), use the following example as a guide:

```
$HYPERION_HOME/common/LicenseServer/lmgrd -c \  
$HYPERION_HOME/common/LicenseServer/Licences
```

► To run License Server in the foreground, use the `-z` flag.

- If you want to run License Server in the foreground with specific license file(s), use the following example as a guide:

```
$HYPERION_HOME/common/LicenseServer/lmgrd -c./licenses -z \  
$HYPERION/common/LicenseServer/Licenses/<License_file_name>
```

- If you want to run License Server in the foreground while specifying the directory containing the license file(s) (recommended), use the following example as a guide:

```
$HYPERION/common/LicenseServer>lmgrd -c./licenses -z \  
$HYPERION/common/LicenseServer/Licenses
```

Note: To view `lmgrd`, use the command, `$ ps -efx | grep lmgrd`.

For detailed information on starting License Server manually, see Chapter 6 of the *FLEXnet Licensing End User Guide*: “Starting the License Server Manager on UNIX Platforms” or “Starting the License Server Manager on Windows.”

Starting Shared Services

This section describes how to start Shared Services if you did not deploy the Shared Services application server as a Windows service. If you deployed the Shared Services application server as a Windows service, the Shared Services server is started automatically when the computer is started. To start the service without restarting the computer, start the service manually from Windows control panel.

► To start Shared Services server:

1 Choose a method:

- On Windows, select **Start > Programs > Hyperion System 9 Foundation > Start Shared Services**.

The menu item indicates which application server the Shared Services server is deployed to.

- Execute the startup script:

Application Server	Path to Script
IBM WebSphere	Windows: <HSS_HOME>\AppServer\InstalledApps\<AppServName>\<version>\SharedServices9\bin\startSharedServices9.bat UNIX: <HSS_HOME>/AppServer/InstalledApps/<AppServName>/<version>/SharedServices9/bin/startSharedServices9.sh
BEA WebLogic	Windows: <HSS_HOME>\AppServer\InstalledApps\<AppServName>\<version>\SharedServices9\startSharedServices.bat UNIX: <HSS_HOME>/AppServer/InstalledApps/<AppServName>/<version>/SharedServices9/startSharedServices.sh
Oracle	Windows: <OracleInstallDir>\bin\emctl start iasconsole <OracleInstallDir>\opmn\bin\opmnctl startall UNIX: <OracleInstallDir>/bin/emctl start iasconsole <OracleInstallDir>/opmn/bin/opmnctl startall

Application Server	Path to Script
Apache Tomcat	Windows: <code><HSS_HOME>\AppServer\InstalledApps\<AppServName>\<version>\SharedServices9\bin\startSharedServices9.bat</code> UNIX: <code><HSS_HOME>/AppServer/InstalledApps/<AppServName>/<version>/SharedServices9/bin/startSharedServices9.sh</code>

Note: <HSS_HOME> is the directory where Shared Services is installed; for example, `c:\hyperion\SharedServices\9.0`.

Verifying Successful Startup of Shared Services

► To verify successful startup and configuration of Shared Services:

1 Look for the following confirmation messages in the Shared Services console window during startup:

- Database Configuration Test Passed
- Security System Initialized Successfully
- Shared Services Initialized Successfully

On UNIX, when Shared Services is deployed to the Tomcat application server, these confirmation messages are logged to the following file:
`<HSS_HOME>/AppServer/InstalledApps/<AppServName>/<version>/SharedServices9/logs/Catalina.out`

When Shared Services is deployed to WebSphere, these confirmation messages are logged to the following file:

- Windows:
`<WebSphereInstallDir>\AppServer\logs\SharedServices9\SystemOut.log`
- UNIX:
`<WebSphereInstallDir>/AppServer/logs/SharedServices9/SystemOut.log`

2 On the Shared Services server computer, launch the User Management Console login page using one of these methods:

a. Open a browser and enter this URL:

`http://<SharedServicesServerName>:<port#>/interop`

where <SharedServicesServerName> is the name of the computer where the Shared Services server is installed and <port#> is the Shared Services server port number. The default port number is 58080; if Shared Services server is installed to a non-default port, specify that value. For example, using the default port:

`http://jdoe:58080/interop/`

Note: As a best practice when accessing User Management Console on the machine where the Shared Services server is running, the URL to access the console should always use an IP address or a fully qualified machine name that includes the domain name. If the IP address is dynamic, use the fully qualified machine name.

- b. On Windows, select **Start > Programs > Hyperion System 9 Foundation > User Management Console**.

If the User Management Console login page is displayed, Shared Services server is started successfully.

Setting up a Server and Database

When you first install the Strategic Finance server software, there will be no servers, databases, or users: you must use the Strategic Finance Administrator utility to create at least one HSF Server, HSF Database, and add users to the system before anyone can log in.

Once the Strategic Finance server software has been installed, see the following topics:

- [“Starting the HSF Administrator Utility” on page 68](#)
- [“Creating a Server” on page 68](#)
- [“Connecting to a Server” on page 69](#)
- [“Creating a Database” on page 69](#)
- [“Selecting a Database” on page 70](#)
- [“Adding Users \(Standard NLTM only\)” on page 70](#)

Starting the HSF Administrator Utility

The first time you access the HSF Administrator utility, the user ID used for log in becomes the initial administrator. To use a different user ID, log in using a different user ID before you run the Administrator utility for the first time.

- To start the HSF Administration utility and create the initial administrator, from the desktop, double-click the Administrator icon

The user ID has now been designated as the initial administrator. Change this user ID using the Administrator utility.

Creating a Server

You can add a Server from the Strategic Finance Administrator.

- To create a server:
 - 1 From the menu bar of the Administrator utility, select **Server > Open**.
 - 2 Next to the **Server** drop-down list on the Strategic Finance Login dialog, click the **...** button.
 - 3 On the **Select Server** dialog, click **New**.
 - 4 In the **Address of Server on Network (IP or DNS)** text box, enter the address of the server on the network (IP Address or Domain Name).

If you are running HSF Administrator from the server console, you can enter “localhost” as the IP address.

Note: The default DNS setting is HSFServer.

- 5 In the **Protocol for Server Connection** text box, enter the protocol information for the server connection.

Note: The default protocol is ncacn_ip_tcp.

- 6 In the **Name for this Server Connection** text box, enter a connection name.

This is an arbitrary name used to identify the server when you log in.

- 7 Click **OK**.

- 8 **Optional:** If you would like Strategic Finance to connect to a server automatically in the future, highlight the server name and select the **Make Default** check box.

- 9 Click **OK**.

Connecting to a Server

You can connect to an existing server from the Strategic Finance Administrator.

- To connect to an existing server:

- 1 From the **Strategic Finance** program directory, double-click `HSFAdmin.exe`.

Note: The default location is:

```
C:\Hyperion\Strategic Finance\<release>\Server
```

Where <release> is the number of the current release.

- 2 Select **Server > Open**.

- 3 In the **Server** drop-down list, click on the desired server name.

- 4 **Optional:** If you would like Strategic Finance to connect to a server automatically in the future, highlight the server name and select the **Make Default** check box.

- 5 Click **OK**.

Creating a Database

You can create a database to use for use by Strategic Finance clients.

- To create a database:

- 1 From the Administrator utility workspace, select the **Databases** tab.

- 2 From the menu bar, select **Database > Add**.
- 3 In the **New Database** text box, enter a name identifying the database.
This is an arbitrary name used to identify the database when you log in.
- 4 Click **OK**.

Selecting a Database

There are two ways you can access a database.

Selecting a Database from the Menu Bar

- To select a database from the menu bar:
 - 1 From the Administrator utility workspace, select **Server > Change Database** to see a list of databases on the connected server.
 - 2 Select the database in the list box and click **OK**.

Selecting a Database from the Database Tab

- To select a database from the Database tab:
 - 1 Select the **Database** tab.
 - 2 Double-click on a database.

Adding Users (Standard NLTM only)

After you have connected to a server, you can add users to Strategic Finance.

Note: For information on adding users via Shared Services, refer to the Hyperion System 9 Shared Services User Management Guide.

- To add users:
 - 1 From the Administrator utility workspace, select the **Users** tab.
 - 2 From the menu bar, select **User > Add**.
 - 3 In the **Domain Name** text box, enter to the domain wherein the user is a member. Click the ... button to browse.
 - 4 In the **User Name** text box, enter the user ID of the user as it is listed in the domain. Click the ... button to browse.
 - 5 In the **Full Name** text box, enter the real name of the user.
 - 6 In the **Access Type** text box, select an access type from the drop-down list:

- **Administrator**

This access type enables a user to:

- Create users and user groups
- Create Scenario Types
- Create Rule Sets for data export to an external database

- **Power User**

This access type enables a user to:

- Create, check-in, and check-out entities
- Create and modify reports
- Create and modify subaccounts
- Create and modify forecast methods
- Create and modify Freeform formulas

- **Data Input**

This access type enables a user to:

- Check-in and check-out entities for data input

- **Read Only**

This access type enables a user to:

- Check-out entities for viewing

- **None**

Assigns no access privileges to the user.

7 Optional: In the **Compression Level** text box, select a compression level from the drop-down list. Default is recommended.

8 Optional: Select administrator options:

- Select the **Edit Server Information in Summary Information** check box if the user should be enabled to change summary information in the Administrator utility.
- Select the **Open ALS Files** check box if the user should be enabled to open server entities as local files.
- In the **E-mail address** text box, enter an email address to send notification of server actions. Click **Send E-mail** to send a test message to the account.
- In the **Phone number** text box, enter a phone number where the administrator in case of emergency.

9 Optional: In the **Notes** text box, enter any additional information you may wish about the user.

10 Click OK.

Connecting a Client to a Strategic Finance Server and Database

Before you can work with a file that resides on the Strategic Finance server, you must connect a client application to the server.

► To connect a client to the server:

- 1 From the Strategic Finance program folder, run Strategic Finance, `HSF.exe`, on the client workstation.
- 2 From the Strategic Finance menu bar, select **Server > Change Server**.
- 3 If the server to which you want to connect is listed, go to step 4; otherwise:
 - a. Click the ... button.
 - b. Click the **New** button.
 - c. In the **Address of Server on Network (IP or DNS)** text box, enter the IP or DNS setting information of the Strategic Finance Server.

Note: The default DNS setting is HSFServer.

- d. In the **Protocol for Server Connection** text box, enter the protocol information.

Note: The default protocol is `ncacn_ip_tcp`.

- e. In the **Name for Server Connection** text box, enter a connection name.
- f. Click **OK**.
- 4 **Optional:** To have Strategic Finance automatically connect to a server, highlight the server name and select the **Make Default** check box.
- 5 Click **OK**.
- 6 In the **Select Database** dialog box, click on the desired database.

Note: If you want to make a database the default for connecting to this server, select the **Make Default** check box while the database is highlighted.

- 7 Click **OK**.

Changing a Database on the Server

After you connect the Strategic Finance client and server, you can select a database on the server.

► To select a different database:

- 1 From the Strategic Finance menu bar, select **Server > Change Database**.
- 2 In the **Select Database** dialog box, select a database.

Note: If you want to make a database the default for connecting to this server, select the **Make Default** check box while the database is highlighted.

- 3 Click **OK**.

After these connections are established, the other items on the Server menu become available.

Using the Server Menu

The Server menu is available from the Strategic Finance Desktop, and is used to manage interaction with files on the Strategic Finance server, or the server itself. The following table describes each item in the Server menu.

Table 14 Server Menu Options

Option	Description
Create New Entity	Creates a new file on the Strategic Finance Server, modeled on a file stored on the server.
Copy Local File to Server	Creates a new file on the Strategic Finance Server, modeled on a locally stored file.
Open Entity	Retrieves an Entity, or file, from the connected Strategic Finance server. You can open Entities with read/write access (check-out with lock), or read-only access (open as copy). If a file is checked out with read/write access, it is then locked by the user; other users cannot make changes to the file until the lock is released.
Open Draft	Retrieves draft copies of Entities.
Check-In	Checks in a locked file that has been checked out. This menu option is not enabled unless a file has been checked out. Available only when an entity is open.
Save as Draft	Saves the entity as a draft copy. Available only when an entity is open.
Release Lock	Opens an interface that enables users to break any locks they own. Available only when an entity is open.
Entity Change Management	Enables you to perform one or multiple operations to several Entities with one command.
Entity Structures	Provides a convenient way to view and manage Entities.

Table 14 Server Menu Options (Continued)

Option	Description
Consolidation Structures	Provides the means to create and modify Consolidation structures.
Batches	Provides a way to create and manage batches for import-export between Hyperion products.
Maps	Provides a way to create and manage maps for import-export between Hyperion products.
List Log Files	Displays a list of Strategic Finance Server transaction logs.
Change Database	Connects to a different Database that exists on the connected Strategic Finance Server.
Change Server	Enables you to alternate between Strategic Finance Servers if more than one is present on the network.
Disconnect	Disconnects from the connected Strategic Finance Server.

Installing PKZip® (Optional) for Database Backup and Restore

Strategic Finance provides the ability to back up databases for the purposes of archiving and sharing. A database can be archived and later retrieved on the local system, or it can be transmitted for integration into a related system.

You must use the PKZip® Command Line for backing up and restoring Strategic Finance database files through the HSF Administrator tool. PKZip is not supplied with Strategic Finance, but can be purchased by visiting www.pkware.com or calling (414) 354-8699. Installing PKZip and using the backup and restore feature is optional.



Uninstalling Strategic Finance

This chapter contains procedures for uninstalling Strategic Finance.

In This Chapter	Uninstalling the Server	76
	Uninstalling the Client	77

Uninstalling the Server

Whenever you uninstall the Strategic Finance server, you must reboot afterwards to ensure the changes have taken effect.

Removing the Server With the Uninstall Wizard

Follow the instructions below in order to remove the server. However, in the event the standard steps fail, you can also use the uninstall utility.

Caution! Before uninstalling, make sure that all users have checked in all entities.

➤ To uninstall the Strategic Finance server:

- 1 From the desktop, select **Start > Settings > Control Panel > Administrative > Services**.
- 2 From the **Services** dialog box, select the Strategic Finance server.

Note: In some releases, the name is 'HSFService'. In earlier releases, the name is 'AlcarService'.

- 3 Click **Stop**.
- 4 From the desktop, select **Start > Settings > Control Panel > Add/Remove Programs**.
- 5 From the **Add/Remove Programs** dialog box, select the Strategic Finance Server.

Note: In some releases, the name is 'HSF Service'. In earlier releases, the name is 'Alcar Server'.

Note: Do not remove the existing database directory (depending on your release, it may be called `.. \HSFData` or `.. \AlcarData`). When the new server software is installed, it automatically detects the database(s) in these directories.

- 6 Click **Remove**.
- 7 Reboot the computer.

Removing the Server from the Command Line Console

If a standard uninstall has failed, use the uninstall utility.

- To use the uninstall utility:
- 1 Open a command prompt.
 - 2 Navigate to the uninstall directory.

The default uninstall directory is:

```
<drive>:\Program Files\Hyperion\Strategic  
Finance\x.x\Server\StrategicFinanceUninstaller
```

- 3 Execute the uninstall utility using the **-console** switch.

For example:

```
uninstallhsfserver -console
```

- 4 The uninstaller will run in a separate console. Follow the prompts.
- 5 Reboot the computer.

Uninstalling the Client

Whenever you uninstall the Strategic Finance client, you must reboot afterwards to ensure the changes have taken effect.

Removing the Client With the Uninstall Wizard

- To uninstall the Strategic Finance client:

- 1 Select **Start > Settings > Control Panel > Add/Remove Programs**.
- 2 From the **Add/Remove Programs** dialog box, select the Strategic Finance client.

Note: In some releases, the name is 'Strategic Finance.' In earlier releases, the name is 'Alcar'.

- 3 Click **Remove**.
- 4 Reboot the computer.

Removing the Client from the Command Line Console

If a standard uninstall has failed, use the uninstall utility.

- To use the uninstall utility:

- 1 Open a command prompt.
- 2 Navigate to the uninstall directory.

The default uninstall directory is:

```
<drive>:\Program Files\Hyperion\Strategic  
Finance\<release>\StrategicFinanceUninstaller
```

Where <release> is the number of the current release.

- 3 Execute the uninstall utility using the **-console** switch.

For example:

```
uninstallhsfclient -console
```

- 4** The uninstaller will run in a separate console. Follow the prompts.
- 5** Reboot the computer.



Troubleshooting

The following section contains information for the Strategic Finance server and client.

In This Appendix	Why Does the Client Fail to Connect to the Server?	80
	How Can I Perform Diagnostics on HSFSservice?	80
	How Can I Run Strategic Finance on Novell?	82

Why Does the Client Fail to Connect to the Server?

Failures associated with the server are usually revealed by a client that fails to connect to the server, or that locks up when it does connect. The server runs as a service under Windows 2000, making it very simple to monitor and control. When troubleshooting the server, confirm connectivity between the client and server. If problems persist, use one of the following procedures.

- Follow these troubleshooting steps:
 - 1 On the server where Strategic Finance is running, select **Start > Programs > Administrative Tools > Services**.
 - 2 Check whether HSFServer is started and set to start automatically on reboot. If not, start the HSFServer.
 - 3 If HSFServer is running and you still have connection problems, try stopping and starting the service.

If you are unable to regain normal functionality with these steps, contact Hyperion Support.

How Can I Perform Diagnostics on HSFService?

HSFService is the name of the Strategic Finance service running on the server. To collect diagnostic information and troubleshoot any problems, you must be logged on to the system with full administrator privileges. Diagnostics can be performed directly on the server or using a remote access program.

Event logs and other logs are useful tools in debugging the system. For information regarding the logging utilities available for troubleshooting, refer to the *Oracle's Hyperion® Strategic Finance Administrator's Guide*.

Starting and Restarting HSFService

Some problems may be caused by the fact that HSFService might not be running. Other problems that may occur may be fixed by restarting HSFService in order to restore a clean operating environment.

- To restart HSFService:
 - 1 From the Windows Server desktop, select **Start > Settings > Control Panel > Administrative Tools > Services**.
 - 2 In the list box displaying all services, right-click **HSFService** and select one of the following from the menu:
 - If HSFService is currently running, select **Restart** to restart.
 - If HSFService has stopped running, select **Start** to start.

Verifying HSFSservice in Windows Task Manager

You can verify that HSFSservice is running by using Windows Task Manager.

- To verify HSFSservice in Windows Task Manager:
 - 1 From the keyboard, press **Ctrl-Alt-Delete**.
 - 2 In the **Windows Security** window, click **Task Manager**.
 - 3 In the **Windows Task Manager** dialog box, select the **Processes** tab.
 - 4 Scroll through the list of active processes until you locate **HSFServer.exe**.

Some issues to look for:

- If **HSFServer.exe** is not in the list of active processes, you may need to start it. For instructions, see [“Starting and Restarting HSFSservice” on page 80](#).
- When you find **HSFServer.exe** in the list, check the **Mem Usage** column. If it is using more than 500 MB, it might indicate that there has been a memory error and you may need to restart HSFSservice. For instructions, see [“Starting and Restarting HSFSservice” on page 80](#).

Checking for HSFSservice Messages in the Event Viewer

You can find HSFSservice-related event messages and error messages in the Event Viewer.

- To find HSFSservice event messages using Event Viewer:
 - 1 From Windows Server desktop, select **Start > Settings > Control Panel > Administrative Tools > Event Viewer**.
 - 2 In the **Tree** navigator, select **Application Log**.
 - 3 In the **Application Log** list box, scroll through the messages searching for any errors labeled ‘HSFSservice’.
 - 4 Examine any error messages to determine the problem.

‘Out of memory’ errors, ‘breakpoint c0000005’ errors, and ‘cannot open’ errors may indicate that there has been memory corruption, and you may want to restart HSFSservice. For instructions, see [“Starting and Restarting HSFSservice” on page 80](#).

Server Memory Errors and Error Logs

Some memory errors that might occur in one of the logs include messages such as:

- “Access violation at breakpoint c0000005”
- “Not enough storage space available to process this command”

These messages indicate that the server has not recovered from the error. So, any other error messages to occur in the log after the memory error are suspect. After you troubleshoot the memory error problem, the subsequent errors may disappear.

- Memory errors may be fixed by restarting HSFService. For instructions, see [“Starting and Restarting HSFService” on page 80](#).
- For information regarding the logging utilities available for troubleshooting, refer to the *Oracle’s Hyperion® Strategic Finance Administrator’s Guide*.

How Can I Run Strategic Finance on Novell?

For most stand-alone implementations of Strategic Finance, you can use Standard NTLM Security. You must use External Authentication, enabled by Shared Services, if any of the following are true:

- The computer running Strategic Finance is not attached to a Windows domain
- The user does not have a Windows login and password
- The Windows domain is not trusted by External Authentication

If you use Novell and have successfully copied all Novell users into an LDAP security provider, you are ready to configure Strategic Finance for use with External Authentication.

If you use Novell and have not successfully copied all Novell users to an LDAP security provider, you must set up all Strategic Finance users in another security provider trusted by External Authentication before you set up External Authentication.

For information on setting up Shared Services, refer to *Hyperion System 9 Shared Services Installation Guide and Hyperion System 9 Shared Services User Management Guide*. For information on setting up Strategic Finance for use with Shared Services, see [Chapter 7, “Configuring and Setting Up Strategic Finance”](#).



Import and Export Installation and Setup

This appendix contains procedures for setting up staging databases in SQL Server and Oracle.

In This Appendix	RDBMS Export.	84
	Setting Up the Export Database for SQL Server.	84
	Setting Up the Export Database for Oracle	85
	Configuring the Strategic Finance Server for Database Export	87

RDBMS Export

The Export feature provides the ability to integrate Strategic Finance data with SQL Server and Oracle. Export generates RDBMS transactions in a staging database whenever Strategic Finance client entities are created, updated, or deleted from the Strategic Finance server. These transactions are inserted into several staging tables and each transaction has associated indexes linked by foreign keys.

The tables are linked by unique transaction_id columns generated sequentially by the system. Some of the tables are also linked by variable_id or the period ID or both, using Strategic Finance's standard naming convention for time periods.

The transactions transport the data from a Strategic Finance entity, and can be filtered and customized by a user-defined Rule Set in the HSF Administrator application.

You can create Rule Sets that define the accounts, time periods, and scenarios to be exported when an entity is checked in to the Hyperion Strategic Client server.

Installing MTAC

One of the prerequisites is that a compatible version of MTAC must be installed on the Strategic Finance server in order to connect with a relational database server. For information on compatible MTAC versions, see [“Client Workstation Requirements”](#) on page 24.

Setting Up the Export Database for SQL Server

This installation procedure must be performed by a database administrator or equivalent who has privileges to create schema, tables, packages, and so on. Additionally, administration access to the Strategic Finance server operating on Windows is required.

Creating an Instance of SQL Server

In SQL Server, you will need to create an instance of the server in which to create the target database. You will also need to have the following on hand when you create the connection for Strategic Finance:

- SQL Server server name. The instance in which you will create the export database. You will need this in [“Setting up the External Database Connection in Strategic Finance Server”](#) on page 88.
- User ID for accessing the database. You will need this in [“Setting up the External Database Connection in Strategic Finance Server”](#) on page 88.
- Password to secure access. You will need this in [“Setting up the External Database Connection in Strategic Finance Server”](#) on page 88.

Creating the Export Database

Using the user ID and password preceding, access the SQL Server instance and run the Strategic Finance export database scripts. Strategic Finance provides five SQL scripts that you can use to set up the database. You can use these scripts to configure operation of the Strategic Finance Server, including the RDBMS database, logins, security, roles, and procedures. The scripts create a database and users with default names; if you want to use other names, you must edit the script.

The scripts are installed to the **C:\Program Files\Hyperion\Strategic Finance\Server\DB\SQL Server** folder. To install the scripts, use an appropriate SQL tool (for example, Query Analyzer), and install them to the SQL Server database. You must install the scripts in the order shown in the following table.

Please review especially Step 1 and Step 2 for conformance to your environment. Note that the Step 1 script is used for initial installation; for reinstallations, use the Step1alt script.

Table 15 SQL Server Scripts

Script	Description
Step1_create_alcar_database	Creates the Strategic Finance SQL Server database, with the default name hsfsvr.
Step1alt_remove_objects	Alternative step 1 removes objects for reinstall.
Step2_security	Sets up logins and permissions. The default: <ul style="list-style-type: none">• login = hsfdbuser• password = password
Step3_tables_grants	Contains the base Strategic Finance database schema including tables, indexes, and keys with default grants.
Step4_procs_funcs	Contains stored procedures and functions.

Setting Up the Export Database for Oracle

This installation procedure must be performed by an Oracle database administrator or equivalent who has privileges to create schemas, tables, packages, and so on. Additionally, administration access to the Strategic Finance Server is required.

Setting Up Oracle Connectivity

Before you can set up the Oracle database export, you must do the following:

- Install the Oracle client on the Strategic Finance server. This enables communication between the Strategic Finance server and the Oracle server.

- On the Oracle server, create an Oracle Service Name. You will create the export database within this Oracle Service Name, and will need the actual name to create a connection in [“Setting up the External Database Connection in Strategic Finance Server”](#) on page 88.
- User ID for accessing the database. You will need this in [“Setting up the External Database Connection in Strategic Finance Server”](#) on page 88.
- Password to secure access. You will need this in [“Setting up the External Database Connection in Strategic Finance Server”](#) on page 88.

Note: For information on installing and configuring Oracle servers and creating an Oracle Service Name, refer to your Oracle documentation.

Creating the Export Database

Using the user ID and password from the preceding section, access the Oracle Service Name and create the Oracle schema, or database, that is used by Strategic Finance to contain the tables, and packages. The schema name can be any name that best suits your company standards. If there is no standard, you can use HSFSvr.

Strategic Finance provides five SQL scripts that you can use to set up the database. The scripts are installed to the C:\Program Files\Hyperion\Strategic Finance\<release>\Server\DB\Oracle folder, where <release> is the number of the current release. To build the database from the scripts, use an appropriate SQL tool (for example, SQL Plus), and install into the designated schema. You must install the scripts in the order shown in the following table.

Note: When you load the scripts into Oracle, ensure that there are no errors. If there are any unexpected errors, contact Hyperion Solutions.

Note: There are no “drop object” definitions in any of the following SQL scripts. The first two SQL scripts (which include creating tables and indexes), assume a clean database schema. You cannot load the first two SQL scripts more than once in a schema.

Table 16 Database Scripts for Oracle

Script	Description
Step1_tables_views.sql	Contains the base and ancillary Strategic Finance database schema including tables, sequences, indexes, and keys.
Step2_defaultscreate.sql	Contains defaults and substitution procedures.
Step3_pkgcreate.sql	Contains package definitions and bodies for the base Strategic Finance database export and the customer interface table.
Step4a_optionalauditcreate.sql	Optional audit table for defaults and substitutions.
Step4a_optionalaudittrigger	Optional trigger for defaults and substitutions.

The following procedure is an example of loading the Strategic Finance SQL scripts using SQLPlus:

1. Type: `C:\>sqlplus HSF/password@HSFOraDBSrvName.`
2. Replacing `scriptname` with the real name of the script, type: `SQL>scriptname.sql.`
3. Load the scripts using the order in the preceding Database Scripts table.

Configuring the Strategic Finance Server for Database Export

You use the Administrator utility to set up the connection between the Strategic Finance server and the relational database server.

Selecting Database Connectivity

► To set up the external connection:

- 1 From the desktop, double-click on the HSF Administrator icon.
- 2 Select **Server > Open**, select a server, then click **OK**.
- 3 Select the **Server** tab.
- 4 Select **Server > External Connection Settings**.
- 5 In the **Choose Database Connectivity**, select one of the following data access methods:
 - **SQL Server**
 - **Oracle**

Note: When you make any changes to the current setting, you need to restart the HSFService in order for the changes to take effect. If you are upgrading from an existing connection using ODBC, you will need to change this parameter to reflect your new database connection.

- 6 Verify prerequisite software. See [“Server Requirements for All Implementations” on page 26](#).
- 7 Close the Administrator utility.
- 8 From the desktop, select **Start > Settings > Control Panel > Administrative Tools > Services**.
- 9 In the **Services** dialog box, select **HSF Service**, right-click, and select **Restart**.

Creating Rule Sets

Before you can complete [“Setting up the External Database Connection in Strategic Finance Server” on page 88](#), you must have a Rule Set.

Refer to the *Oracle’s Hyperion® Strategic Finance Administrator’s Guide* or the online help for the Administration utility for information on creating Rule Sets.

Setting up the External Database Connection in Strategic Finance Server

After you have installed both Strategic Finance and the HSF Administrator, and set up your database, you can set up database connectivity.

► To set up the Strategic Finance Server connection to the export database:

- 1 From the desktop, double-click on the HSF Administrator icon.
- 2 Select **Server > Open**, select a server, then click **OK**.
- 3 Select the **Databases** tab, or select **View > Databases**.
- 4 Select **Database > External Database**.

The **External Database** dialog box is displayed.

- 5 In the **External Database** dialog box, enter or select the following:
- 6 From the **HSF Database** drop-down list, select the database for which to set up the external database connection.
- 7 From the **Connection Type** drop-down list, select **Export**.
- 8 In the **OLEDB Data source** text box, enter the Data Source Name.
- 9 In the **User ID** text box, enter the user ID for accessing the relational database.
- 10 In the **Password** text box, enter the schema password.
- 11 In the **Rule Set Name** text box, enter a rule set name.

For information on creating rule sets, refer to the *Oracle's Hyperion® Strategic Finance Administrator's Guide*.

- 12 **Optional:** In the **Email Addresses** text box, enter a comma-separated list of email addresses of those you may wish to notify when exports fail.

You can use the **Browse** button to locate email addresses.

- 13 To export entities to the database, select the **Database Connectivity Enabled** option.
- 14 Click **OK** to save the external database connection settings.

HSF Administrator tests the database connection and returns to the main window.

Setting Up Extended Analytics

► To configure Strategic Finance for Extended Analytics:

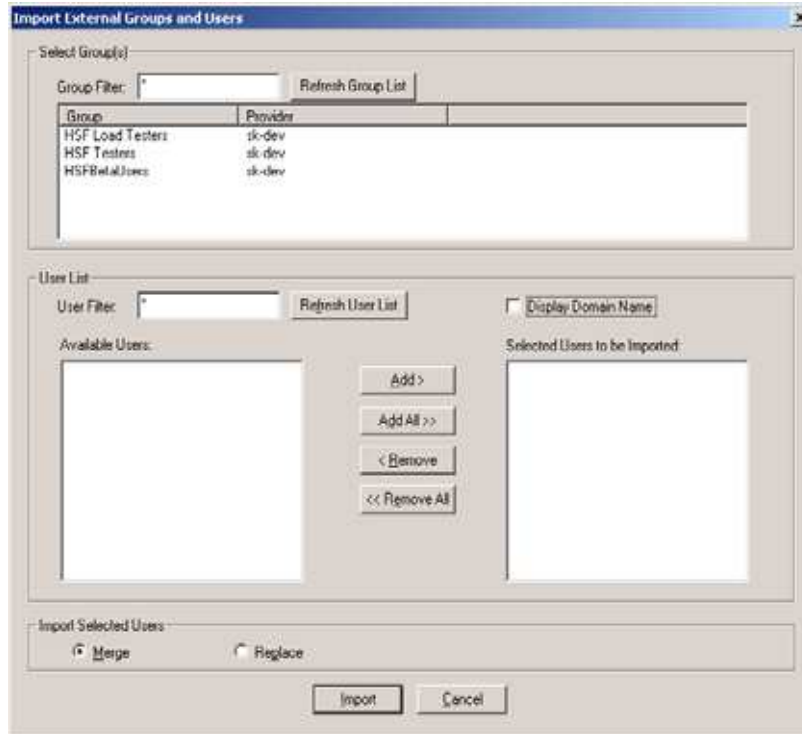
- 1 On the Strategic Finance server, select **Start > Settings > Control Panel > Administrative Tools > Data Sources (ODBC)**.
- 2 On **System DSN**, click **Add**.
- 3 In **Create New Data Source**, select **SQL Server** and click **Finish**.

- 4 Set up a new data source and click **Next**:
 - In **Name**, enter the name of the target relational database.
 - In **Description**, enter a description.
 - In **Server**, enter the name of the relational database server.
- 5 On the next screen, select the following and click **Next**:
 - Select the **With SQL Server authentication using a login ID and password entered by the user** option.
 - Select the **Connect to SQL Server to obtain default settings for the additional configuration options** option, and enter the username and password of the target relational database.
- 6 On the next screen, select **Change the default database to**, and select the target relational database, then click **Next**.
- 7 Click **Finish**.
- 8 Test the connection, and click **OK**.

Installing and Configuring with Hyperion Enterprise Batch Import and Export

- To install and configure batch import and export between Strategic Finance and Enterprise:
- 1 Install Hyperion Shared Services.
 - Required for creating maps, batches, and connecting.
 - 2 Configure the local policies user rights on the HSF client and server machines.
 - Select **Start > Settings > Control Panel > Administrative Tools > Local Security Policy > Local Policies > User Rights Assignment**.
 - Add the domain to **Access this computer from the network**.
 - Add the domain to **Act as part of the operating system**.
 - Restart the server.
 - 3 On both the HSF client and server machines, install the **Complete Setup of Enterprise** with the following components:
 - **External Security Services**
 - **Optional: Enterprise Conversion Utility**. Required only if you are upgrading from a previous version of Enterprise.
 - 4 On both the HSF client and server machines, configure Enterprise External Security Services.

5 Access Enterprise and configure External Authentication, then restart Enterprise.



- For Enterprise Release 6.4.x or later: After you import the authentication provider you must add users from the provider to Enterprise. When adding users on the Import External Groups and Users dialog box, make sure you select Display Domain Name, or batch import/export with Enterprise will not work.

6 Install the Strategic Finance Server with the following options:

- Shared Services
- Hyperion Enterprise Integration
- Users must be provisioned for Strategic Finance and configured in Enterprise External Authentication.

7 On the HSF Client machine, install the Enterprise Client.

8 Install the Strategic Finance Client with the following options:

- **Hyperion Enterprise Integration**
- **Shared Services**

9 Configure Strategic Finance for External Authentication.

- In Shared Services, provision the domain user from step 3 for Strategic Finance.
- In Shared Services, set up a database.

10 On the Strategic Finance Server, you should now be able to configure and run imports and exports.



Other Installation Options

This appendix explains other installation options for Strategic Finance.

In This Appendix	Performing Silent Installations with Strategic Finance	92
	Installing with Terminal Services	93

Performing Silent Installations with Strategic Finance

Silent install is an option enabling you to install software manually from the command prompt.

► To use the silent install option with Strategic Finance, do the following:

- 1 Open a command line prompt and access the Strategic Finance install directory, then run the following command to create the 'answerrec.txt' file:

```
setup.exe -option-record answerfile.txt
```

- 2 Using a text editor, open the 'answerrec.txt' file and add the following line at the beginning of the file:

```
-W HSF401ClientLicenseBean.typedPasswordHash="b1164835"
```

- 3 You can use the other lines to configure the installation as follows:

```
-P installLocation="C:\Program Files\Hyperion\Strategic Finance\4.0.1"
# The install location.

-W setupTypes.selectedSetupTypeId=custom
# The setup type option:
#   typical - Recommended for most users.
#   custom  - Enables you to select or deselect the features following.

-P hSFInstRef_Hyperion Strategic Finance.active=true
# Selects or deselects the client for installation:
#   true   - selected
#   false  - deselected

-P hSFInstRef_hSFClient3_5_1EntIntBean.active=false
# Selects or deselects the Hyperion Enterprise Integration feature.
Options:
#   true   - selects
#   false  - deselects

-P hSFInstRef_hSF3_5_1HFMMFeatureBean.active=false
# Selects or deselects the Hyperion Financial Management Integration
feature.
# Options:
#   true   - selects
#   false  - deselects

-P hSFInstRef_hSF3_5_1PlanningIntegrationBean.active=false
# Selects or deselects the Hyperion Planning Integration feature.
Options:
#   true   - Indicates that the feature is selected for installation
#   false  - Indicates that the feature is not selected for installation

-P hSFInstRef_hSFClient3_5_1EssBaseIntBean.active=false
# Selects or deselects the Hyperion Essbase Integration feature. Options:
#   true   - selects
#   false  - deselects

-P hSFInstRef_hSF351DeskIconBean.active=true
# Selects or deselects the Desktop Icon feature. Options:
#   true   - selects
#   false  - deselects
```

```

-P hSFInstRef_hSF3_5_1AdminFeature.active=false
# Selects or deselects the Server Administration Tool feature. Options:
#   true  - selects
#   false - deselects

-P hSFInstRef_hSF351DeskIconBean2.active=true
# Selects or deselects the Admin Desktop Icon feature. Options:
#   true  - selects
#   false - deselects

-P hSFInstRef_hSF3_5_1GUISupportFeatBean.active=true
# Selects or deselects the Support Files feature. Options:
#   true  - selects
#   false - deselects

```

4 Run the following command:

```
setup.exe -options answerfile.txt -silent
```

Installing with Terminal Services

The Strategic Finance client can be deployed with Microsoft Terminal Services, allowing for centralized management of the Client application. Running under Terminal Services, you can install the Strategic Finance client application on a single server, then configure other networked computers to remotely run the Client from that server.

Figure 1 The Strategic Finance Client on a Terminal Services Server



Under Terminal Services, a client will access a server installed with the Strategic Finance Client, allowing a number of clients to share the same installation. That server then connects to another running the Strategic Finance Server.

Perform the following tasks in order to install the Strategic Finance Client with Terminal Services.

Setting up the Terminal Services Server

The server must be running Windows 2000 Server with Terminal Services.

- To set up the Terminal Services server with the Strategic Finance client:
 - 1 Verify that the server is running Windows 2000 Server.
 - 2 Verify that Terminal Services has been installed. From the desktop, select **Start > Settings > Control Panel > Administrative Tools > Terminal Server Configuration > Server Settings** and verify the following:
 - Terminal Server Mode: Application Mode
 - Permission Compatibility: Windows 2000 user.
 - 3 Install the Strategic Finance client on the Terminal Services server.See [Chapter 6, “Client Installation”](#).

Installing the Terminal Services Client

The client computer must now be set up as a Terminal Services client.

- To set up a Terminal Services client:
 - 1 On the Terminal Services server, configure the `\\%Home%\System32\Clients\Tscclient\Net\Win32` as a network shared directory.
 - 2 On the Terminal Services client, access the directory above and run the Terminal Services client `setup.exe` to install the software.

Configuring the Terminal Services Client

The client must now be configured to connect to the Terminal Services server, and there is an option for creating a shortcut.

- To set up a Terminal Services client:
 - 1 From the Windows desktop, select **Start > Programs > Terminal Services Client > Client Connection Manager**.
 - 2 From the menu bar of the Client Connection Manger, select **File > New Connection**.
 - 3 On the **Welcome** window of the Client Connection Manager Wizard, click **Next**.
 - 4 On the **Create a Connection** window, enter a unique name in the **Connection Name** text box and the **DNS Name** or **IP Address** of the Terminal Services server and click **Next**.
 - 5 **Optional:** On the **Automatic Logon** window, select the **Log on automatically with this information** option and enter the **User Name**, **Password**, and **Domain** that the connection will use for logging on and click **Next**.
 - 6 **Optional:** On the **Screen Options** window, select **800x600** and click **Next**.
 - 7 **Optional:** On the **Connection Properties** window, select any desired options and click **Next**.
 - 8 **Optional:** On the **Starting a Program** window, select the **Start the following program** option, then enter the filepath to `HSF.exe`. and click **Next**.

This will automatically run Strategic Finance from the server whenever the user logs on.

- 9 Click **Next**.
- 10 Click **Finish**.
- 11 Double-click on the new connection to test.

Installing with Citrix

The Strategic Finance client can be deployed with Citrix, allowing for centralized management of the Client application. Running under Citrix, you can install the Strategic Finance client application on a single server, then configure other networked computers to remotely run the Client from that server.



A Citrix server installed with the Strategic Finance client allows a number of clients to share the same installation. That server then connects to another running the Strategic Finance server.

Installing Citrix Presentation Server 4.0 Client

- To install the Citrix Presentation Server:
 - 1 Open a command line prompt and access the Strategic Finance install directory, then run the following command to create the 'answerrec.txt' file:

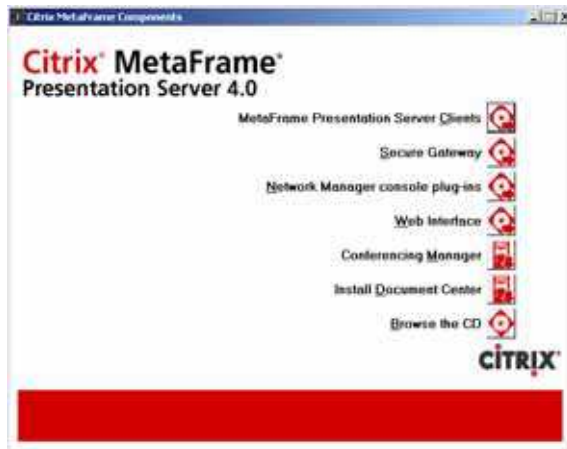
Installing Citrix Presentation Server 4.0 Client

- To install the Citrix Presentation Server:
 - 1 Open a command line prompt and access the Strategic Finance install directory, then run the following command to create the 'answerrec.txt' file:

Installing Citrix Presentation Server

► To install the Citrix Presentation Server:

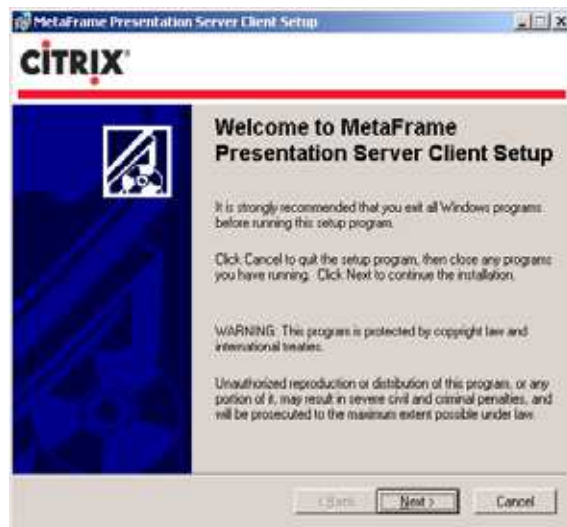
1 Insert the Citrix Server install CD.



2 Click MetaFrame Presentation Server Clients.



3 Click Install MetaFrame Presentation Server Client for Windows.



4 Click Next.

- 5 Deselect the **Web Client** and **Program Neighborhood Agent** components and click **Next**.



- 6 Accept the default and click **Next**.



- 7 Select **Use the machine name as the client name** and click **Next**.



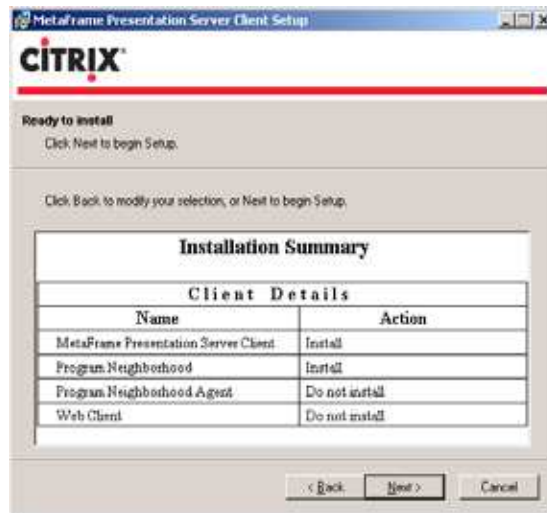
8 Select **No** and click **Next**.



9 Accept the default and click **Next**.



10 Click **Next**.



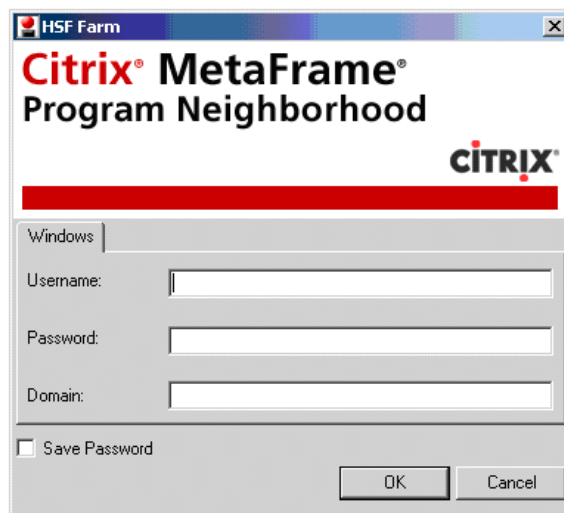
- 11 Click **Finish** to exit.



- 12 The **Citrix Program Neighborhood** icon appears on the desktop:

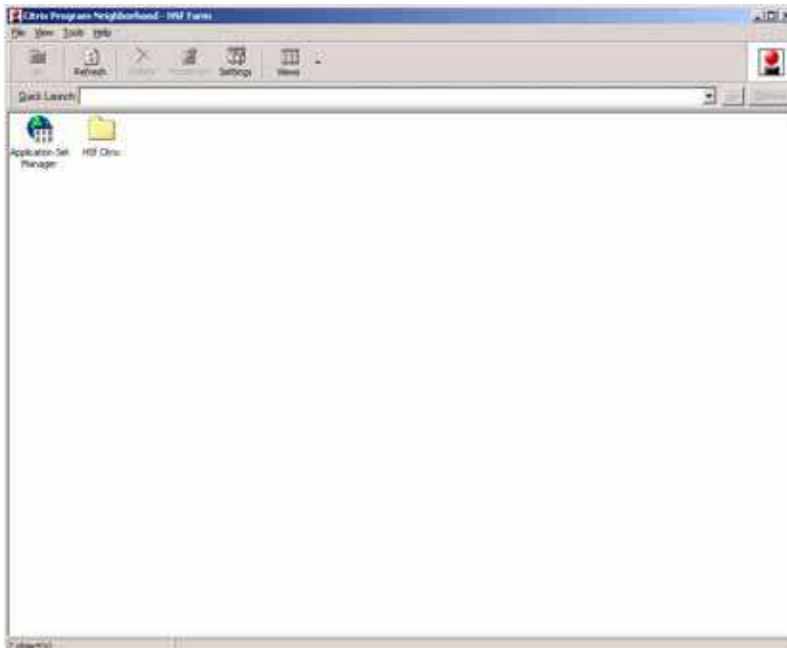


- 13 Double-click the icon.



- 14 Enter the username and password for the domain the Citrix Metaframe Presentation Server. This access must be previously configured. Refer to www.citrix.com for setting up your Citrix Metaframe Presentation Server environment.

- 15 The application set available from the “farm” setup on the Citrix Metaframe Presentation Server will appear on the browser dialog. Open the folder and the application icon should be available. It should may also appear on your desktop.



- 16 Double-click the HSF application icon and sign on using the configured user information. If the password is saved, the HSF application should startup directly.
- 17 The HSF application logon should appear and the HSF user should be able to access the HSF client.



Program Files Inventory and Server Registry

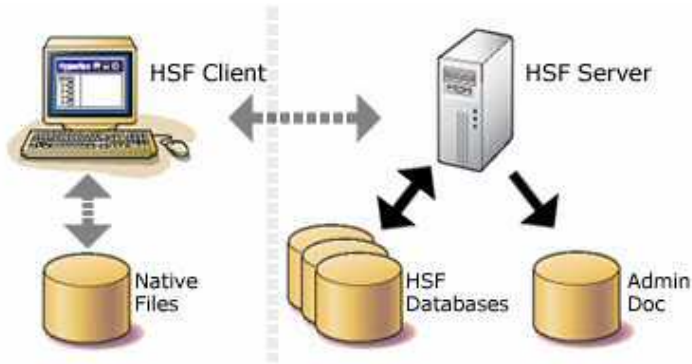
This section offers a quick overview of the Strategic Finance software architecture, then describes the folders and files that comprise the client and server components of Strategic Finance.

In This Appendix	Overview	102
	Client Files	102
	Server Files	104
	Server Registry	107
	Database Files	112
	Port Numbers	116

Overview

Strategic Finance can be installed as a stand-alone client, or as a client-server system, as illustrated in the following figure:

Figure 2 Strategic Finance Client-Server Architecture



If the client is installed as a stand-alone program, all data is stored in local .alc files. In a client-server system, the client can be used to create and work on entities stored in a centrally-managed database in the server. The server can manage multiple databases. Global information for all databases is stored in a separate file called AdminDoc.

Client Files

Directory of C:\Hyperion\StrategicFinance\Client

```
05/15/2006 01:41p <DIR> .
05/15/2006 01:41p <DIR> ..
02/13/2006 09:04p 47,624 Afw20bnk.drs
05/08/2006 09:34p 74,469 afwcred.drs
02/13/2006 09:04p 61,719 Afw_latn.drs
02/13/2006 09:04p 60,978 Afw_lats.drs
02/13/2006 09:04p 64,951 Afw_safr.drs
05/08/2006 09:35p 88 Alcared.lst
02/13/2006 09:04p 63,941 alclnutl.drs
02/13/2006 09:04p 64,779 alclputl.drs
02/13/2006 09:04p 597 Bank40 COA renumbering.txt
02/13/2006 09:04p 138 bk60.csv
02/13/2006 09:04p 174,406 bkn40b.coa
05/08/2006 09:34p 706,560 Brasil.alt
05/08/2006 09:34p 70,499 brazil.drs
05/08/2006 09:34p 282 Brazil40CoAREnumb.txt
05/08/2006 09:35p 182 Brazil40Renumb2.txt
02/13/2006 09:04p 115,031 BZP30A.coa
05/08/2006 09:34p 8,628 Consdata.dat
05/08/2006 09:34p 16,599 convert.idx
05/10/2006 02:27p 660 CopyActiveFiles.bat
05/08/2006 09:34p 167,975 currdata.dat
02/13/2006 09:04p 714 currlist.dat
05/08/2006 09:34p 656,896 Ejemplo.alc
```

05/08/2006	09:34p	531,456	Espanol.alt
05/08/2006	09:35p	14,624	Examples.xml
05/08/2006	09:34p	1,396,224	Exemplo.alc
03/03/2006	11:01a	95,236	FIN30A.coa
05/08/2006	09:35p	766	Graph.ico
05/10/2006	02:26p	<DIR>	Help
05/08/2006	09:34p	692,224	HSF Standard.alt
05/08/2006	09:34p	775,168	HSF Utility.alt
05/08/2006	11:22p	6,545,408	HSF.exe
05/08/2006	09:55p	1,789,952	HSFAdmin.exe
05/08/2006	09:35p	1,078	HSFAdmin.ico
05/08/2006	09:35p	167,859	HSFBzP40.coa
05/09/2006	12:20a	114,688	HSFClientCommunication.dll
05/08/2006	09:41p	12,800	HSFClip.dll
05/08/2006	09:45p	917,504	HSFCLS.dll
05/08/2006	09:45p	1,421,312	HSFCoA.dll
05/08/2006	09:46p	81,920	HSFConnect.dll
05/08/2006	09:45p	14,848	HSFConsolidator.dll
05/08/2006	09:45p	52,736	HsfCSS.dll
05/08/2006	09:35p	12,742	HSFDoc.ico
05/08/2006	09:41p	12,288	HSFDump.dll
05/08/2006	09:40p	110,592	HSFError.dll
05/08/2006	09:46p	45,056	HSFErrorDlg.DLL
05/08/2006	09:35p	28,305	HSFESS.HLP
05/08/2006	11:24p	11,776	HSFEssLink.dll
05/08/2006	11:24p	11,776	HSFEssLinkD.dll
05/08/2006	09:40p	27,648	HSFExtString.dll
05/08/2006	09:40p	16,896	HSFFixedStrings.dll
08/29/2005	04:26p	454,656	HSFFL203asu.dll
07/16/2004	04:16p	1,720,320	HSFGrid903asu.dll
05/08/2006	09:47p	8,704	HSFHLink.dll
05/08/2006	09:47p	8,704	HSFHLink_A.dll
05/08/2006	11:23p	7,168	HSFHLink_D.dll
05/08/2006	09:46p	53,248	HSFHFMLink.dll
05/08/2006	09:46p	53,248	HSFHFMLink_A.dll
05/08/2006	11:23p	53,248	HSFHFMLink_D.dll
05/08/2006	09:35p	23,645	hsfhyp.HLP
03/03/2006	11:01a	116,998	HSFLtS40.coa
05/08/2006	09:41p	8,192	HSFPath.dll
05/08/2006	09:35p	585	HSFreg.ini
03/03/2006	11:01a	109,621	HSFSA40.coa
05/08/2006	09:41p	73,728	HSFSerialize.dll
05/08/2006	09:45p	200,704	HSFServerItems.dll
05/08/2006	09:35p	181,829	HSFStd40b.coa
05/09/2006	12:20a	311,296	HSFStrings.dll
05/08/2006	09:41p	38,912	HSFSummaryInfo.dll
08/30/2005	12:17p	1,896,448	HSFToolkit803asu.dll
05/08/2006	09:35p	192,820	HSFUM40b.coa
07/16/2004	04:50p	999,424	HSFViews803asu.dll
05/08/2006	09:35p	420,056	HSF_splash.bmp
02/13/2006	09:04p	128	Int60.csv
02/13/2006	09:04p	229	License.Ini
05/10/2006	02:27p	29,671	log.txt
05/08/2006	09:35p	379,960	logon_panel.bmp
02/13/2006	09:04p	79,412	LTN30A.coa
02/13/2006	09:04p	125	ltp60.csv
02/13/2006	09:04p	128	lts60.csv
05/08/2006	09:35p	669	register.bat

```

05/21/2003  09:26a                69,632 RWUXThemeSU.dll
02/13/2006  09:04p                127 sa60.csv
05/08/2006  09:34p            1,590,272 Sample Utility.alc
05/08/2006  09:34p            2,025,984 Sample.alc
05/08/2006  09:34p            744,960 South Africa.alt
05/08/2006  09:35p            93,164 standard_de_de_acct.xml
05/08/2006  09:35p            94,314 standard_es_es_acct.xml
05/08/2006  09:35p            85,680 standard_ja_jp_acct.xml
05/08/2006  09:35p            93,919 standard_pt_br_acct.xml
05/08/2006  09:35p            78,534 standard_zh_cn_acct.xml
05/10/2006  02:27p      <DIR>          StrategicFinanceUninstaller
05/08/2006  09:35p            26,694 StratFin.ico
05/08/2006  09:35p            203,400 timewiz.bmp
05/08/2006  09:35p        1,848,984 ttf16.hlp
05/09/2006  12:25a        1,265,664 TTF16.ocx
05/09/2006  12:23a        1,638,400 TTFI6.ocx
05/08/2006  09:35p            462,848 TTFIWZ6.dll
02/13/2006  09:04p            64,221 ULN.drs
02/13/2006  09:04p            86,561 ULN30.coa
02/13/2006  09:04p            64,925 ULP.drs
02/13/2006  09:04p            91,860 ULP30A.coa
02/13/2006  09:04p            86,314 UM.drs
02/13/2006  09:04p            112,115 UMN30A.coa
02/13/2006  09:04p            184,909 UMN40e.coa
02/13/2006  09:04p            117 us60.csv
02/13/2006  09:04p            77,465 UT.drs
02/13/2006  09:04p            122 ut60.csv
02/13/2006  09:04p            600 Util40CoARenumb.txt
05/08/2006  09:34p            96,756 Utlmgr_n.drs
02/13/2006  09:04p            136 utltn60.csv
02/13/2006  09:04p            139 utltp60.csv
02/13/2006  09:04p            129 utm60.csv
08/30/2005  03:06p            282,624 vc6-re2001.dll
05/08/2006  09:35p            53,248 zlib.dll
      112 File(s)      36,209,291 bytes
       4 Dir(s)      6,559,686,656 bytes free

```

Server Files

Directory of C:\Hyperion\StrategicFinance\Server

```

05/15/2006  01:47p      <DIR>          .
05/15/2006  01:47p      <DIR>          ..
02/13/2006  09:04p            597 Bank40 COA renumbering.txt
02/13/2006  09:04p        174,406 bkn40b.coa
05/08/2006  09:34p            282 Brazil40CoARenumb.txt
05/08/2006  09:35p            182 Brazil40Renumb2.txt
05/08/2006  09:34p            8,628 Consdata.dat
05/08/2006  09:34p            16,599 convert.idx
05/10/2006  02:38p            658 CopyActiveFiles.bat
05/08/2006  09:34p        167,975 currdata.dat
02/13/2006  09:04p            714 currlist.dat
05/10/2006  02:38p      <DIR>          DB
03/03/2006  11:01a            95,236 FIN30A.coa
05/10/2006  02:37p      <DIR>          Help
05/08/2006  09:55p        1,789,952 HSFAdmin.exe

```


05/08/2006	09:46p	102,400	HSFADO.dll
05/08/2006	09:35p	167,859	HSFBzP40.coa
05/09/2006	12:20a	114,688	HSFClientCommunication.dll
05/08/2006	09:41p	12,800	HSFClip.dll
05/08/2006	09:45p	917,504	HSFCLS.dll
05/08/2006	09:45p	1,421,312	HSFCoA.dll
05/08/2006	09:46p	81,920	HSFConnect.dll
05/08/2006	09:45p	14,848	HSFConsolidator.dll
05/08/2006	09:45p	52,736	HSFCSS.dll
05/08/2006	09:40p	8,192	HSFDomainInfo.dll
05/08/2006	09:41p	12,288	HSFDump.dll
05/08/2006	09:40p	110,592	HSFError.dll
05/08/2006	09:46p	45,056	HSFErrorDlg.DLL
05/08/2006	11:24p	11,776	HSFEssLink.dll
05/08/2006	11:24p	11,776	HSFEssLinkD.dll
05/08/2006	09:40p	27,648	HSFExtString.dll
05/08/2006	09:40p	16,896	HSFFixedStrings.dll
08/29/2005	04:26p	454,656	HSFFL203asu.dll
07/16/2004	04:16p	1,720,320	HSFGrid903asu.dll
05/08/2006	09:47p	8,704	HSFHELLink.dll
05/08/2006	09:47p	8,704	HSFHELLink_A.dll
05/08/2006	09:46p	53,248	HSFHFMLink.dll
05/08/2006	09:46p	53,248	HSFHFMLink_A.dll
05/08/2006	11:23p	53,248	HSFHFMLink_D.dll
03/03/2006	11:01a	116,998	HSFLtS40.coa
05/08/2006	09:41p	8,192	HSFPath.dll
03/03/2006	11:01a	109,621	HSFSA40.coa
05/08/2006	09:41p	73,728	HSFSerialize.dll
05/08/2006	10:26p	4,476,928	HSFServer.exe
05/08/2006	09:45p	200,704	HSFServerItems.dll
05/08/2006	09:35p	56	HSFservice-install.bat
05/08/2006	09:35p	32	HSFservice-remove.bat
05/08/2006	09:35p	2,283	HSFService.reg
05/08/2006	09:35p	181,829	HSFStd40b.coa
05/09/2006	12:20a	311,296	HSFStrings.dll
05/08/2006	09:41p	38,912	HSFSummaryInfo.dll
08/30/2005	12:17p	1,896,448	HSFToolkit803asu.dll
05/08/2006	09:35p	192,820	HSFUM40b.coa
07/16/2004	04:50p	999,424	HSFViews803asu.dll
05/08/2006	09:35p	420,056	HSF_splash.bmp
05/09/2006	12:36a	13,588	HSMConfig.jar
02/13/2006	09:04p	76,870	INN30A.coa
05/08/2006	09:31p	26,666	InteropJava.jar
02/13/2006	09:04p	106,342	LBN60.coa
02/13/2006	09:04p	310	License.Ini
05/10/2006	02:37p	2,262	log.txt
05/08/2006	09:35p	379,960	logon_panel.bmp
02/13/2006	09:04p	79,412	LTN30A.coa
02/13/2006	09:04p	83,580	LTP30A.coa
05/21/2003	09:26a	69,632	RWUXThemeSU.dll
05/15/2006	01:29p	125	ServerFiles.txt
05/08/2006	09:35p	32	StartHSFService.bat
05/08/2006	09:35p	27	StopHSFService.bat
05/10/2006	02:38p	<DIR>	StrategicFinanceServerUninstaller
05/09/2006	12:25a	1,265,664	TTF16.ocx
05/09/2006	12:23a	1,638,400	TTFI6.ocx
02/13/2006	09:04p	86,561	ULN30.coa
02/13/2006	09:04p	87,028	ULN30A.coa

```
02/13/2006 09:04p          91,860 ULP30A.coa
02/13/2006 09:04p        112,115 UMN30A.coa
02/13/2006 09:04p        126,759 UMN40c.coa
02/13/2006 09:04p        184,909 UMN40e.coa
02/13/2006 09:04p           600 Util40CoARenumb.txt
08/30/2005 03:06p        282,624 vc6-re2001.dll
05/08/2006 09:35p         53,248 zlib.dll
          75 File(s)      21,535,549 bytes
          5 Dir(s)      6,558,703,616 bytes freeHyperion Home Directories
```

Hyperion Home is installed to the following default filepath:

C:\Hyperion\Common

The following directories contain files used by Strategic Finance:

..\Hyperion\Common\CSS

Files for use in external authentication are stored in this directory.

..\Hyperion\Common\LookAndFeel

Files for use in the user interface are stored in this directory.

Server Registry

This section lists parameters added to the registry for Strategic Finance.

Caution! Do not edit registry entries, unless specified “Configurable HSFSservice Registry Parameters” on page 110.

HSFSservice Registry Parameters

Parameters for the HSFSservice can be found in the following location of the registry:

HKEY_LOCAL_MACHINE\SOFTWARE\Hyperion Solutions\HSFSservice

The following table lists the parameters for the HSFSservice:

Table 17 HSFSservice Registry Parameters

Parameter	Type	Data
(Default)	REG_SZ	(value not set)
AdminDirectory	REG_SZ	C:\HSFData\Admin (default)
ArchiveDirectory	REG_SZ	Archive
ArchiveWarningLevel	REG_SZ	Block
CSSConfigFile	REG_SZ	Absolute filepath to the External Authentication configuration file
DatabaseConnectionString	REG_SZ	Use to connect to the database
DatabaseConnectivityType	REG_SZ	ODBC or OLE DB DB Name
DataSourceConnectionString	REG_SZ	SQLOLEDB
DefaultLogFile	REG_SZ	C:\HSFData\Admin\Default.log
EntityDirectory	REG_SZ	ADB
EntityFileExtension	REG_SZ	ALS
HSFDataDir	REG_SZ	C:\HSFData
LockFileExtension	REG_SZ	LCK
LogDirectory	REG_SZ	C:\HSFData
MaxBackgroundWorkers	REG_SZ	3
MaximumIntensiveRequests	REG_SZ	10
MaximumProcessSize	REG_SZ	2048000
MaximumFreeMemory	REG_SZ	51200
MRUListSize	REG_SZ	5

Table 17 HSFService Registry Parameters

Parameter	Type	Data
RootDirectory	REG_SZ	C:\HSFData
RPCPort	REG_SZ	This is the port where the Strategic Finance server connects: 1493
SecurityRegime	REG_SZ	If this register is not displayed or shows no value, NTLM is the default. For External Authentication, set to: CSS
SocketBufferSize	REG_SZ	1024000
SocketPort	REG_SZ	1495
StructLockFileExtension	REG_SZ	LKS
StructureFileExtension	REG_SZ	CNS
TemplateExtension	REG_SZ	ALT
TraceLevel	REG_SZ	Standard
UserFile	REG_SZ	Users.adm
UserLogDirectory	REG_SZ	An absolute filepath to the directory where user logs are written. Default: C:\HSFData\UserLogs

HSF Service Shared Services Registry Parameters

Parameters for the HSF Service to communicate with Shared Services can be found in the following location of the registry:

HKEY_LOCAL_MACHINE\Software\Hyperion Solutions\HSFService\Authentication

The following table lists the parameters for the HSF Service and Shared Services:

Table 18 HSF Server Registry Parameters for Shared Services

Name	Type	Data
(Default)	REG_SZ	(value not set)
ClassPath	REG_EXPAND_SZ	The classpath
ConnectionInfo	REG_SZ	A string used for connection to Shared Services
HubInstanceID	REG_SZ	A string storing the name of a specific Shared Services server
HubURL	REG_SZ	A URL for connecting to Shared Services

Table 18 HSF Server Registry Parameters for Shared Services

Name	Type	Data
JamPath	REG_EXPAND_SZ	A filepath for locating the Java Virtual Machine
LibPath	REG_EXPAND_SZ	A filepath for locating required libraries

HSF Service License Manager Registry Parameters

Parameters for the HSF Service to communicate with License Manager can be found in the following location of the registry:

HKEY_LOCAL_MACHINE\Software\Hyperion Solutions\HSFService\Licensing

The following table lists the parameters for the HSF Service and License Manager:

Table 19 HSF Server Registry Parameters for License Manager

Name	Type	Data
(Default)	REG_SZ	(value not set)
DeploymentID	REG_SZ	The deployment for Strategic Finance
LicenseServerPath	REG_SZ	A string for connecting to License Manager

HSF Server Registry Parameters

Parameters for the HSF Server can be found in the following location of the registry:

HKEY_CURRENT_USER\Software\Hyperion Solutions\Strategic Finance\HSFServer

The following table lists the parameters for the HSF Server:

Table 20 HSF Server Registry Parameters

Name	Type	Data
(Default)	REG_SZ	(value not set)
network address	REG_SZ	HSFserver
protocol	REG_SZ	ncacn_ip_tcp

Configurable HSFSservice Registry Parameters

You can configure the following HSFSservice registry parameters according to your needs. These parameters can be configured using the Administration utility.

ArchiveWarningLevel

The Administration utility has an Archive Repair feature to fix archive numbers. When you open an archive of an entity, the new release contains an archive version check to ensure that the version number is correct for the archive. By default, this archive check is enabled. The `ArchiveWarningLevel` registry entry controls this archive check.

When the archive check finds that the archive and the number version are out of sync, by default you cannot open the archive until the Archive Repair feature has been run. When you run Archive Repair on an archived entity, the proper version numbers are restored and the archive is stored under a new filename.

Caution! There are issues you should consider before repairing archives. Consult Hyperion support for additional information about addressing the issue

Because the repaired data is stored under a new filename, there are cases where you may not want to repair the archive. For example, if you have FreeStyle Reports that use the Alias Manager to reference specific archived entities, those references may break if you run the Archive Repair. They may break because the fixed archive data is stored under a new filename different from the one referenced by the Alias Manager.

In such a case, you have two choices:

- If you repair the archives, you must open the FreeStyle Report and manually change the Alias Manager to reference the new filename of the repaired archives.
- If you decide not to repair the archives, you can use them as they exist in order keep your existing FreeStyle Reports.

You can use the `The ArchiveWarningLevel` parameter to override the archive check, in case you decide the archives without running the archive repair. It can be set to these values:

- `Silent`
Overrides the archive check, enabling the use of out-of-sync archives.
- `Warn`
Enables the use of out-of-sync archives, but when a user opens one, a message is written to the event log.
- `Block`
When a user tries to open an out-of-sync archive, the system displays a warning message and blocks the use of the archive. Default.

MaxBackgroundWorkers

The `MaxBackgroundWorkers` parameter defines the number of slots available for long run-time background processes that can be run simultaneously. Long run-time processes include database exports, server consolidations, and Entity Change Manager runs.

If the number of long run-time processes exceeds the `MaxBackgroundWorkers` number, then added processes are queued until a `BackgroundWorker` slot becomes available.

You can use the following equation to estimate the `MaxBackgroundWorkers` setting:

$$2 \times (\text{Number of Physical Processors} - 1)$$

MaximumIntensiveRequests

The `MaximumIntensiveRequests` parameter defines the number of slots available on the server for large file operations, such as Entity Check-in/-out. This enables the server to consolidate resources.

If the number of large file operations exceeds the `MaximumIntensiveRequests` number, the user receives a message to try again later.

You can use the following calculation to estimate the `MaximumIntensiveRequests` setting:

$$(\text{Avg. file size} \times 2) / (\text{Max. memory} - 100 \text{ MB})$$

TraceLevel

The `TraceLevel` parameter determines the amount of information going to the `HSFData\Admin\Default.log` file. Messages are stamped with the server startup date when they are written to the log file.

The `TraceLevel` parameter can be set to the following values:

- Normal
Sends nothing to the log file.
- Info
Sends all actions to the log file.
- Error
Sends only error messages to the log file. Recommended setting.

MRUListSize

The `MRUListSize` parameter determines the number of entities that are held open in the server's in-memory cache of open files. This number should be increased to speed up access to data in recently used files if a great deal of physical memory is available on the server.

Database Files

The databases comprises the directories and files listed in this section.

..\HSFData

The root directory containing the Strategic Finance data is ..\HSFData. Subdirectories containing Strategic Finance databases, the AdminDoc file, and log files are located under this directory.

Table 21 ..\HSFData

Directory or Subdirectory	Description
..\HSFData\	This is the root directory for all databases.
..\HSFData\ADB	This subdirectory contains databases.
..\HSFData\Admin	This subdirectory contains the AdminDoc file.
..\HSFData\Logs	This subdirectory contains transaction log information.

..\ADB

All native Strategic Finance databases are stored under the ..\HSFData\ADB subdirectory.

Table 22 ..\ADB

Subdirectory	Description
.._delete	This subdirectory contains deleted databases.
..\<Database Name>	This subdirectory contains an individual, active database

..\ADB_delete

Deleted databases are stored under the ..\HSFData\ADB_delete subdirectory. Each deleted database is stored in a subdirectory with the name of that database. All files and subdirectories of that database are also stored here. The date the database was deleted is included as part of the directory name

..\ADB*<Database Name>*

Each database is stored under ..\HSFData\ADB*<Database Name>*.

Table 23 ..\HSFData\ABD*<Database Name>*

Subdirectory	Description
..\delete	Contains deleted entities.
.._ecm	Contains Entity Change Management files.
..\<Entity Name>	Contains the entity of same name as the folder.

..\ADB*<Database Name>*\<Entity Name>

Each entity is stored under the ..\HSFData\ADB*<Database Name>*.

Table 24 ..\HSFData\ABD*<Database Name>*\<Entity Name>

Subdirectory or File	Description
..\Archive	This subdirectory contains archived versions of the entity.
..\Drafts	This subdirectory contains working drafts of the entity.
..\<Entity Name>.ALS	A file named after an entity contains that entity.
..\<Entity Name>.bld	This file contains consolidation data for the entity after a consolidation structure has been created.
..\<Entity Name>.STR	This file contains information about structural relationships between entities.
..\<Entity Name>.LCK	This file indicates the entity is locked by a user.

..\Admin

The AdminDoc file is stored in the ..\HSFData\ADB*<Database Name>* subdirectory. It contains global information: user authorization; databases and database configurations; export rule sets; access records; entity groups; user groups; consolidation structure names and configurations; server logging settings; server email controls; backup and restore configurations; and archive retention rules.

Table 25 ..\HSFData\Admin

Files	Description
..\Default.log	This file contains logged errors on general server use.
..\ImportExportRestrictions.xml	This file contains parameter settings which define file export rules for RDBMS staging databases.
..\License.ini	This file contains license information.

Table 25 ..\HSFData\Admin (Continued)

Files	Description
..\User.adm	This is the AdminDoc file.
..\User.tbk	This is a backup of the AdminDoc file

..\Logs

Transactions and log files are stored in the ..\HSFData\Logs subdirectory.

Table 26 ..\HSFData\Logs

Subdirectory or File	Description
.._finished	This subdirectory contains completed transactions.
.._processing	This subdirectory contains transactions currently being processed
..\Event<date>.log	This is a text file logging transaction activity.
..\TRANS.TRN	This is the transaction file
..\TRANSBAK.TRN	This is a backup of the transaction file

..\UserLogs

End user actions are stored in the ..\HSFData\UserLogs subdirectory.

..\Hyperion\StrategicFinance\<release>\Server\DB

Database scripts for creating and upgrading export databases are stored in:

..\Hyperion\StrategicFinance\<release number>\Server\DB

Table 27 ..\Hyperion\StrategicFinance\<release>\Server\DB

Subdirectories and Files	Description
..\DB\Oracle\New	This subdirectory contains scripts for creating an export database in Oracle.
..\DB\Oracle\Upgrade	This subdirectory contains scripts for upgrading existing Alcar 6.x export databases in Oracle to Strategic Finance Release 3.x.
..\DB\SQL Server\New	This subdirectory contains scripts for creating an export database in SQL Server.
..\DB\SQL Server\Upgrade	This subdirectory contains scripts for upgrading existing Alcar 6.x export databases in SQL Server to Strategic Finance Release 3.x.

..\DB\Oracle\New

The ..\DB\Oracle\New directory contains the following scripts:

Table 28 ..\DB\Oracle\New Scripts

File Name	Description
step1_tables_views.sql	This script creates the base and ancillary Strategic Finance database schema including tables, sequences, indexes, and keys.
step2_defaultscreate.sql	This script creates defaults and substitution procedures.
step3_pkgcreate.sql	This script contains package definitions and bodies for the base Strategic Finance database export and the customer interface table.
step4a_optionalauditcreate.sql	This script creates an optional audit table for defaults and substitutions.
step4b_optionalaudittrigger.sql	This script creates an optional trigger for defaults and substitutions.

..\DB\Oracle\Upgrade

The ..\DB\Oracle\New directory contains the `upgrade30.sql` script for upgrading an existing Oracle staging database from Release 6.x to Strategic Finance Release 3.x.

..\DB\SQL Server\New

The ..\DB\SQL Server\New directory contains the following scripts:

Table 29 ..\DB\SQL Server\New Scripts

File Name	Description
step1alt_remove_objects.sql	This script is an alternative step 1 to remove objects for reinstallation.
step1_create_alcar_database.sql	This script creates the Strategic Finance SQL Server database, with the default name <code>hsfsvr</code> .
step2_security.sql	This script sets up logins and permissions. The default login and password are <code>hsfsvr_user, password = null</code> .
step3_tables_grants.sql	This script contains the base Strategic Finance database schema including tables, indexes, and keys with default grants.
step4_procs_funcs.sql	This script contains stored procedures and functions.

..\DB\SQL Server\Upgrade

The ..\DB\SQL Server\New directory contains the `upgrade30.sql` script for upgrading an existing Oracle staging database from Release 6.x to Strategic Finance Release 3.x.

Port Numbers

This section lists port numbers used for installation.

Port Numbers Used by Hyperion Products

During Hyperion System 9 product installation, the default port number for application servers is automatically populated. You can change the default port number during the configuration process or after the installation. If you do not modify the value during the installation, the software is installed with the settings in the following table. For information on modifying the default ports after installation, see the Installation Guide for each product.

Each application port number must be unique. If you modify a default port number, change it to a port number not currently used. After modifying the default port number, if your application does not launch, or an error message is displayed similar to “port already in use” or “bind error,” there may be a port number conflict.

Table 30

Hyperion Product	Listen Port	SSL Listen Port	Shutdown Port for Apache Tomcat
Oracle's Hyperion® Shared Services	58080	58090	58005
Oracle's Hyperion® Application Builder J2EE	21080	21090	21005
Oracle's Essbase® Administration Services	10080	10090	10005
Hyperion® System™ 9 BI+™ Analytic High Availability Services™	11080	11090	11005
Planning	8300	8300	8301
Hyperion Translation Manager	14080	14090	14005
Oracle's Hyperion® Financial Reporting - System 9	8200		8201
Web Analysis	16000		16001
Hyperion Business Modeling	17080	17090	17005
Oracle's Hyperion® Performance Scorecard - System 9	18080	18090	18005
Performance Scorecard Alerting	18081	18091	18006
Enterprise Metrics	8180	828091 8205	8105

Table 30

Hyperion Product	Listen Port	SSL Listen Port	Shutdown Port for Apache Tomcat
Oracle's Hyperion® Smart View for Office	13080	13090	13005
Workspace	19000		45001

Default Port Numbers for Remote Method Invocation (RMI) Servers

Table 31 RMI Ports

Hyperion component	RMI Port
Hyperion Remote Authentication Module	58000
Financial Reporting	1099
Planning	11333
Strategic Finance	1493 (early versions) 7750 (later versions)
Hyperion Performance Suite Legacy	1494 - 1498
Hyperion Performance Suite GSM	1800
Hyperion Performance Suite Services	1801-1803
OpenLDAP	58081

