

HYPERION® PLANNING – SYSTEM 9
RELEASE 9.3.1

INSTALLATION GUIDE FOR UNIX

ORACLE® | Hyperion®

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Planning Installation Guide for UNIX , 9.3.1

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Authors: Aline Goetz

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1

Planning Installation Overview

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About Planning

Oracle's Hyperion® Planning – System 9 is a Web-based, multi-tiered planning and forecasting application that leverages the power of Oracle's Hyperion® Essbase® – System 9 . All Planning configurations include three tiers:

- The database-tier contains the database servers, a relational database, and an Essbase database.
Database-tier components:
 - Essbase
 - A relational database server (either Microsoft SQL Server, Oracle, or IBM DB2).
- The middle tier contains the Planning server, Web server and Application server. Multiple application servers can be created on additional hardware for scalability. Middle-tier components:
 - Planning Java application server
 - Oracle's Enterprise Performance Management Architect Java application server (Windows only)
 - Oracle's Essbase® Administration Services Java application server
 - A Web server
- The client tier contains the administrator client (used for Oracle's Hyperion® Financial Reporting Studio and Oracle's Hyperion® Smart View for Office) and Oracle's Hyperion® Workspace that communicates with the application tier. You use the client tier to enter data, perform process management, manage users and security, launch business rules, copy versions, develop data forms, and perform other administrative tasks. Client-tier components:
 - Administrator client (for Oracle's Hyperion® Financial Reporting – System 9 and Smart View)

- Workspace

Planning has a thin Web-client architecture so that basic users require only a supported browser on the client computer. There is no processing on the client workstation. The middle-tier application server complies with the J2EE standard and supports popular Java application servers such as Weblogic, WebSphere, or Tomcat. Because the middle tier does not contain data, scalability and availability is greatly enhanced. Data is stored and calculated on the database-tier using Essbase. A relational database repository on the database-tier stores the application framework, metadata, and textual data.

If you are upgrading from a previous release of Planning, see *Hyperion Planning – System 9 Using Administrator Features* to learn about new features in this release and see [Chapter 9, “Upgrading to Planning 9.3.1.”](#)

Additional Products

Workspace

Workspace is a zero-footprint client that provides the user interface for viewing and interacting with content created using financial applications (Planning and Oracle's Hyperion® Financial Management – System 9) and Oracle's Hyperion® Reporting and Analysis – System 9 authoring studios:

- Financial reporting for scheduled or on-demand highly formatted financial and operational reporting from most data sources including Planning and Financial Management
- Enterprise metrics for management metrics and analysis presented in easy-to-use, personalized, interactive dynamic dashboards
- Interactive reporting for ad hoc relational queries, self-service reporting and dashboards against ODBC data sources
- Production reporting for high volume enterprise-wide reporting
- Web analysis for interactive ad hoc analysis, presentation, and reporting of multidimensional data
- High performance multidimensional modeling, analysis, and reporting with Essbase

Reporting and Analysis, which includes Essbase, is part of a comprehensive BPM system that integrates the business intelligence platform with financial applications, Smart View, and Oracle's Hyperion® Performance Scorecard – System 9. In addition, Workspace displays different menus and toolbar features based on the user's role and modules provisioned.

Performance Management Architect

Performance Management Architect is a component of Planning and Financial Management that enables an administrator to manage, create, and deploy Hyperion Applications within one interface. Performance Management Architect can be installed as part of the Planning setup program.

You can work with applications in this release using Performance Management Architect or Classic application administration. Different menus and options are available for each type of application. For a summary of features available for Performance Management Architect and Classic application administration, see *Hyperion Planning – System 9 Using Administrator Features*.

Performance Management Architect must be installed on a Windows 32-bit machine and requires:

- A separate database
- Microsoft Internet Information Services (IIS) to run Web Services
- .NET Framework 2.0
- A Java application server

For more information on requirements, see the *Hyperion Installation Start Here*.

The Hyperion Configuration Utility is used to register Performance Management Architect with Oracle's Hyperion® Shared Services, configure the database, and deploy to an application server.

Performance Management Architect has these modules:

- **Dimension Library**—A centralized location to manage dimensions and dimension properties. You can use the Dimension Library to:
 - Create dimension import profiles—enabling dimension updates from both flat files and relational database interface tables
 - Add, delete, and modify dimension members
 - Modify dimension and member properties
- **Application Library**—A summary of Application Views that have been created and/or deployed to Planning, Financial Management, Enterprise Analytics, or Essbase Analytics. Application Views contain dimensions and dimension attributes that are designed to meet specific requirements for Financial Management and Planning needs. You can use the Application Library to:
 - Create Planning, Financial Management, Enterprise Analytics, or Essbase Analytics Application Views based on Planning and Financial Management dimension sets
 - Manage Application Views in one centralized location
 - View the data flow between Application Views
 - Migrate Application Views to different servers
 - Deploy Application Views to Planning, Financial Management, Enterprise Analytics, or Essbase Analytics.
- **Data Synchronization**—Enables data synchronization within Hyperion applications. You can use the Data Synchronizer to:
 - Create data movement synchronizations between Hyperion applications. For example, an administrator can synchronize data between two Financial Management applications, two Planning applications, and an Financial Management and a Planning application

- Create data mappings for reuse
- Create flat file and interface table mappings to import data into Hyperion applications
- **Application Upgrade**—Enables administrators to upgrade from previous Financial Management and Planning releases.
- **Job Console**—Provides a summary of Dimension Library and Application View activities, including imports, deployments, and data synchronizations.

Business Rules

Oracle's Hyperion® Business Rules is an underlying component of Planning that is installed automatically with Administration Services. Business Rules provides comprehensive support for planning needs of global finance organizations. Business Rules is a graphical tool that guides users through the creation, maintenance, customization, documentation, and execution of sophisticated calculations and business models. It can be used in a variety of analytic applications, such as product and customer profitability, budgeting and planning, financial management, and customer relationship management.

Planning users can use Business Rules to create, launch, edit, and organize allocation processes and business rules. Business users select and initiate allocations, create new data, and analyze results.

Essbase

Planning runs on top of Essbase and leverages its robust analytic and calculation capabilities, security filters, APIs, prebuilt financial intelligence, calculation functions, and multicube application support. Planning capitalizes on OLAP and data warehouse technologies by embedding powerful analysis, enhanced scalability, and data management functionality into a purpose-built planning application. Planning stores the application definition in a relational database and then uses this information to create the necessary Essbase databases and security privileges for your application.

Financial Reporting

Financial Reporting creates highly formatted reports that combine grids of data and text, charts, graphs, and images. In addition to providing complete control over layouts, formatting, fonts, and colors, Financial Reporting provides powerful business analytics, such as conditional suppression and automatic calculations that can be used to focus and filter reports. A repository of reusable report components simplifies the process of building and maintaining complex reports.

Tightly integrated with Essbase and Planning, Financial Reporting provides versatile query and reporting capabilities that enable users to create reports that unite data from multiple data sources. A scalable Financial Reporting Server facilitates easy deployment to large user communities.

Data Integration Management

Oracle's Hyperion® Data Integration Management Adapter for Planning is available in this release. DIM Adapter for Planning enables you to define target tables for loading data and metadata into Planning and use the target tables in workflows. You can load data and metadata into custom and attribute dimensions and add UDAs to dimensions. You can perform these tasks for , Oracle's Hyperion® Workforce Planning, and Oracle's Hyperion® Capital Expense Planning. Using the Hyperion Planning connection type, you can create Planning connection objects to specify Planning connection information for each source and target used in a session. For more information, see the *Hyperion Data Integration Management Adapter User's Guide*.

Smart View

Smart View provides integration with Microsoft Office for Planning, Financial Management, Oracle's Hyperion® Financial Reporting Studio, and Oracle's Hyperion® Web Analysis – System 9Smart View. It replaces the spreadsheet add-in for Planning and Financial Management. Within Planning, users can import Planning data forms to Excel. By using Smart View, users can work with the form online connected to the Planning server or take the form offline for additional flexibility.

Shared Services

Shared Services functionality is programmed into products, such as Planning, Financial Management, and Performance Scorecard. Shared Services integrates the products to provide these functionalities:

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

The *Hyperion Security Administration Guide* (on the Hyperion Download Center) describes user provisioning functionality and external authentication definition. 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.

Hyperion License Compliance

Hyperion no longer ships or requires Oracle's Hyperion® License Server™ (or standalone license files) for use with Hyperion products.

To ensure compliance with your license agreement, Hyperion recommends that you implement an auditing process. In addition, during product configuration with Hyperion Configuration

Utility, you activate only the features you purchased. For more information, see “Hyperion License Compliance” in the *Hyperion Installation Start Here*.

Planning Configurations

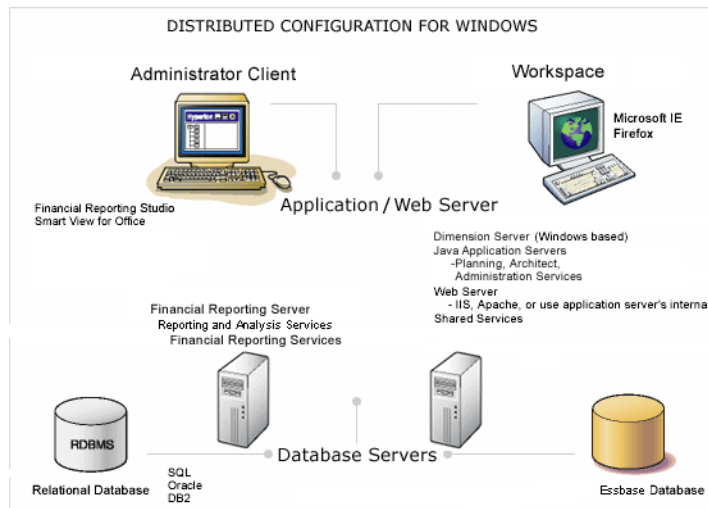
Planning can be configured in various ways. Server specifications depend on factors such as number of users, business process, size, design, and complexity of your Planning applications. You should analyze factors relevant to your environment as you plan your deployment. Hyperion recommends that you contact Hyperion Consulting Services for assistance in planning your deployment.

Planning components can be configured on Windows or UNIX except Performance Management Architect, which can only be configured on a 32-bit Windows machine.

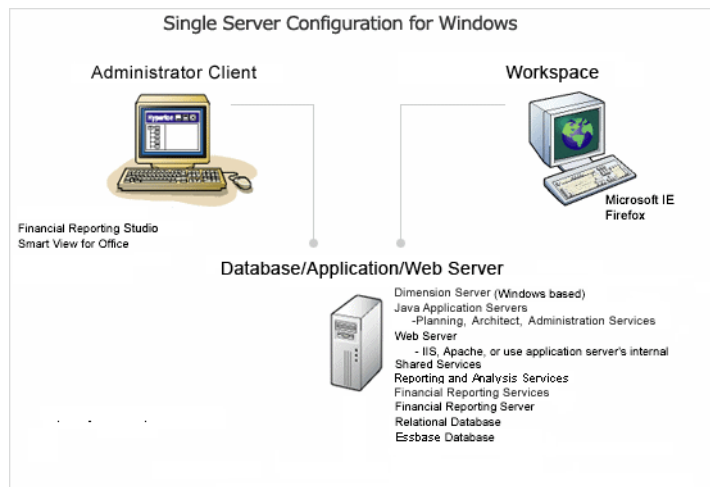
Hyperion *highly recommends* a distributed configuration.

Note:

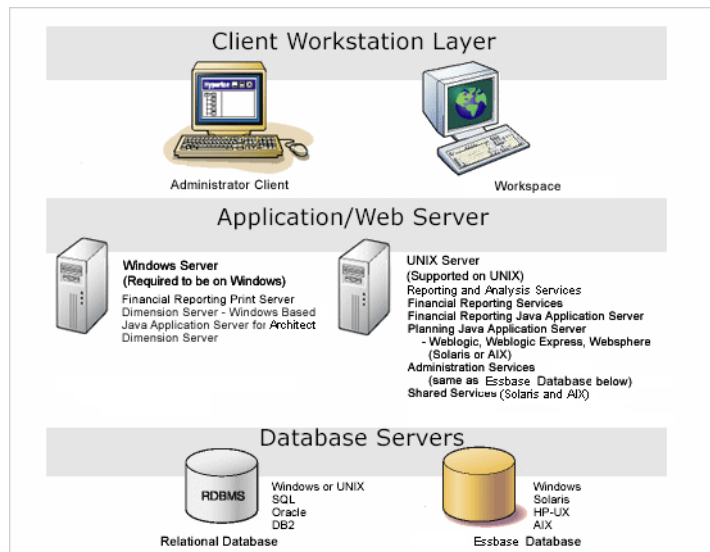
The Administrator Client is not required for Planning any longer because the Desktop functionality moved to the Web. It is now used only for Financial Reporting Studio and Smart View.



Single server configuration, which combines the middle-tier server and the database server on one machine is recommended for a development environment or for customers implementing a very limited number of users. Before implementing this configuration, Hyperion recommends contacting Hyperion Consulting Services to determine if this will work in your environment.



This configuration figure shows which components can be used with UNIX.

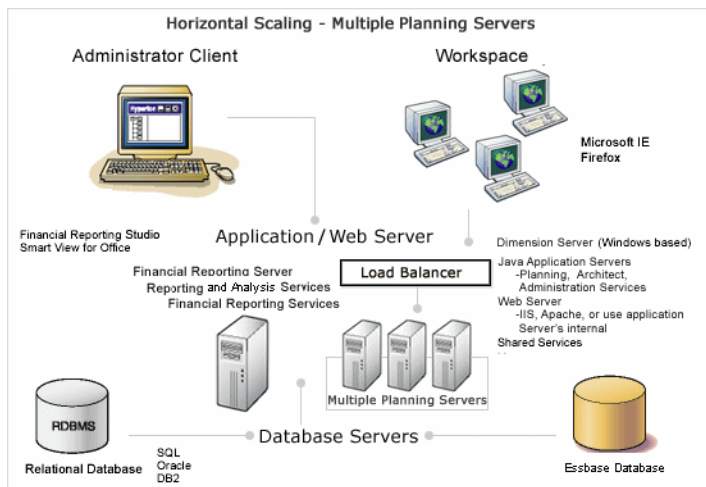


Multiple Server Configuration

Planning applications can be deployed on multiple servers. Benefits of multiple-server deployment:

- Increases support for applications that have a large user load
- Provides failover capabilities for any system, regardless of size

This figure illustrates the recommended configuration for multiple-server deployment. For more information about how to set up Planning using multiple servers, see [“Setting Up Planning Using Clustering” on page 167](#).

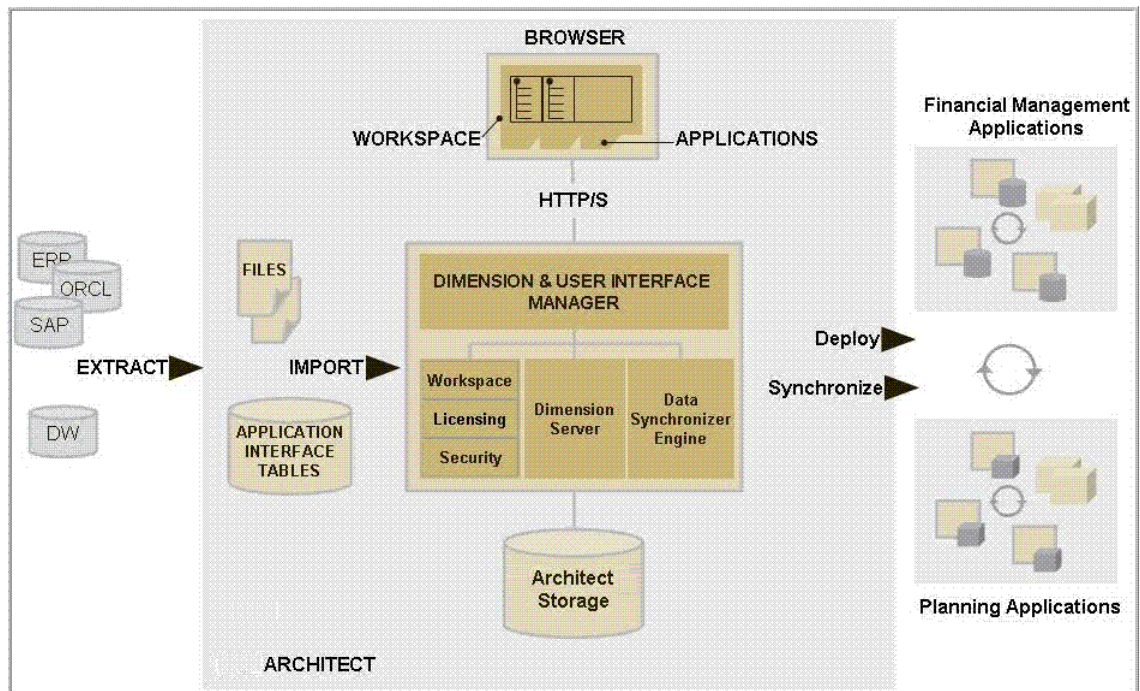


Note:

Changing the number of servers and processors may require changing the number of third-party software licenses. Please reference your third-party vendor license agreements for specific license requirements.

Performance Management Architect Architecture

Performance Management Architect provides an interface to various sources for both metadata and data including Enterprise Resource Planning systems, relational databases, and data warehouses. Data (dimensional hierarchies as well as data) from these sources can be imported into the system using flat files or Hyperion interface tables.



Note:

This is a functional diagram and does not represent the number of servers needed for a deployment.

Performance Management Architect provides a direct interface to Planning and Financial Management applications enabling the creation, maintenance, and synchronization of these applications directly from Performance Management Architect.

The middle tier of Performance Management Architect includes the required application services for application construction, metadata management, data synchronization, and surfacing the user interface.

End users access Performance Management Architect using Workspace, where they also can access reporting content and application content.

2

Installing Database-Tier Components

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Installing and Creating Relational Databases

Before you can create Planning applications, you must install relational database software and create and configure one system database and one or more Planning application databases. Creating the system database separate from the application databases enables you to delete Planning applications without deleting the system tables.

Performance Management Architect also requires that you create a separate Performance Management Architect database.

► To install and create system and application databases:

1 Install the relational database software (one of the following products):

- Oracle
- Microsoft SQL Server
- IBM DB2

Note:

To use a DB2 database for Performance Management Architect, DB2 .NET Data Provider and DB2 9 Runtime Client must be installed on the Performance Management Architect Dimension server machine.

Note:

Planning does not support IBM DB2 Extended Enterprise Edition in a multinode configuration or on an IBM DB2 mainframe.

- 2 For Planning, create a database for the system tables.**
- 3 Create a database for a Planning application and create a user with database owner rights to the database.**
- 4 For Performance Management Architect, create a database for the system tables and optionally for the interface tables.**

General guidelines for creating databases are listed in this table:

Database Requirement	Recommendation
Database table space size	<ul style="list-style-type: none">● 100 MB for applications with 5,000 or fewer total members● 200 MB for applications with 15,000 or fewer total members <p>Note: You can readjust the size of the system table database to match the size of the application.</p>
Basic privileges	<p>Database users must be assigned privileges to add, modify, and delete these database objects:</p> <ul style="list-style-type: none">● tables● indexes● views● procedures● roles/authorities● sequences● triggers <p>In addition, users must be granted a role that assigns unlimited tablespaces. For Oracle databases specifically, users must be assigned the RESOURCE role as well.</p>

Installing Oracle Database Server

The Oracle Universal Installer guides you through the installation and configuration of the Oracle database server. For additional information, refer to the *Oracle Administrator's Guide*.

Note:

If you install client workstations, you must install Oracle client on each workstation.

Note:

For Performance Management Architect, you must install Oracle client on the Dimension server.

Creating Oracle Server Databases

For Performance Management Architect and for each Planning application, have your database administrator create an Oracle user with tablespace privileges. See basic privileges in [“Installing and Creating Relational Databases” on page 19](#).

To share one Oracle instance among multiple installations of Planning on separate computers, create an Oracle user for each installation (unless you are using load balancing).

If your database resides on a remote computer, use the Net8 Assistant to create a Net Service Name that enables Planning to connect to the remote database.

Installing Microsoft SQL Server

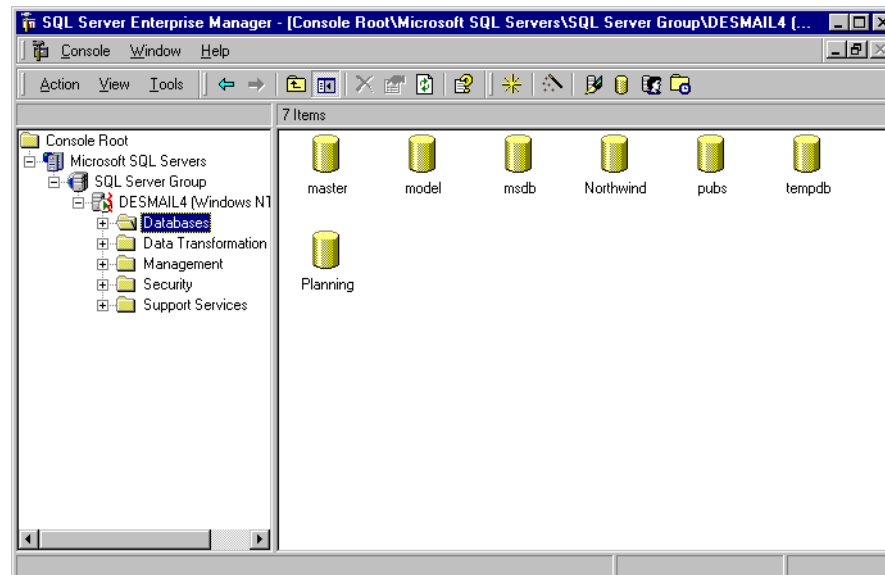
Hyperion recommends that before installation, you familiarize yourself with the *Installing SQL Server* documentation provided on the SQL Server Web page at <http://www.microsoft.com/sql>.

- To use SQL Server with Planning, select these options when prompted:
 - Install SQL Server Components
 - Database Server - Standard Edition
 - Local Install

Creating Microsoft SQL Server Databases

- To create SQL Server databases:
 - 1 On the computer hosting the relational database software, select **Start > Programs > Microsoft SQL Server > Enterprise Manager**.

The SQL Server Enterprise Manager window is displayed.



- 2 In the left frame of the **SQL Server Enterprise Manager** window, expand the directories until you see the **Databases** directory.
- 3 Right-click **Databases**, and select **New Database**.

The Database Properties window is displayed.
- 4 Enter a name for the system database (up to eight characters, for example, *Sysdata*).

Note:

By setting up a separate system database for Planning, you can have multiple applications.

- 5 Click **OK**.

Tip:

Record the database name for future reference.

- 6 Repeat steps 3-5 to create a database for Planning Performance Management Architect, and Business Rules.
- 7 Close SQL Server Enterprise Manager.

Installing IBM DB2 Universal Database

The DB2 Universal Database Library is on a CD or DVD provided by IBM. It contains the DB2 books in PDF files. Refer to *DB2 Administration Guide: Planning* and *DB2 Administration Guide: Implementation* for information on installing and configuring DB2 database servers.

Note:

When installing DB2, clear the OLAP Starter Kit option, because Essbase is not part of DB2 installation and should be installed separately.

Creating IBM DB2 Databases for Planning

Use the Client Configuration Assistant to set up a database alias that enables Planning to connect to the database. Be sure to select “Register this Database for ODBC” and “As a System Data Source”.

Note:

Have your database administrator create a user and tablespace that contains the Planning tables. For database privileges, see basic privileges in [“Installing and Creating Relational Databases” on page 19](#).

Setting Up Tablespaces for Planning

If you are using a DB2 relational database for Planning, you must set up an adequately sized tablespace before you create an application. The database needs a tablespace with a page size of at least 8K to support the Planning tables.

Note:

You cannot create an application until you follow the instructions in this section. If you use DB2 and plan to upgrade Planning from a previous release, you must follow these instructions before you upgrade.

The following SQL script creates the necessary buffer pool and tablespace. Change the names and disk location to reflect your needs. By default, the tablespace is named HSPSPACE8_1 and

is created in the C:\DB2DATA\HSPSPACE8_1 directory. The other settings are also defaults; administrators should adjust them as appropriate.

Example

```
CREATE BUFFERPOOL hspool8_1 SIZE 250 PAGESIZE 8 K;  
CREATE REGULAR TABLESPACE hspace8_1 PAGESIZE 8 K  
    MANAGED BY SYSTEM USING ('c:\db2data\hspspace8_1')  
    EXTENTSIZE 32 OVERHEAD 24.1 PREFETCHSIZE 8  
    TRANSFERRATE 0.9 BUFFERPOOL HSPPOOL8_1;
```

The database administrator needs to ensure that the user who logs on to the Planning relational database has rights to use the new tablespace.

Creating IBM DB2 Databases for Performance Management Architect

To create a DB2 database for Performance Management Architect:

- Create the Performance Management Architect database in a local directory
- Creating a bufferpool to hold the system temporary tablespace that temporarily stores data during sort and collate operations
- Create the system temporary tablespace

Creating the Performance Management Architect Database

When you create the DB2 database in a local directory, be sure to use the codeset UTF-8.

Setting Up a Bufferpool and System Temporary Tablespace for Performance Management Architect

The system temporary tablespace and its corresponding bufferpool (bmapool) are required by Performance Management Architect. The following SQL script creates the necessary buffer pool and tablespace.

Example

```
CREATE BUFFERPOOL bmapool IMMEDIATE SIZE 250 PAGESIZE 32 K;  
CREATE SYSTEM TEMPORARY TABLESPACE bpmabigtemp PAGESIZE 32 K  
    MANAGED BY SYSTEM USING ('c:\db2\Database\bpmabigtemp')  
    EXTENTSIZE 16 OVERHEAD 12.67 PREFETCHSIZE 16  
    TRANSFERRATE 0.18 BUFFERPOOL bmapool;
```

If you are using a DB2 database for Performance Management Architect, a tablespace is created during database configuration in the Configuration Utility. The database administrator must ensure that the user who logs on to the Performance Management Architect relational database has CREATE access to the bufferpool and tablespace and CREATE VIEW privileges.

Installing DB2 v9 Runtime Client and DB2 .NET Data Provider

To use a DB2 database with Performance Management Architect, follow these requirements:

- Install DB2 v9 Runtime Client and DB2 .NET Data Provider on the Dimension Server machine. (DB2.NET Data Provider is installed as part of the DB2 v9 Runtime Client installation.)
- Ensure that your DB2 database is installed on a different computer, and not the Performance Management Architect Dimension Server machine where the DB2 9 Runtime Client will be installed.

DB2 9 Runtime Client Setup

You must install DB2 9 Runtime Client to ensure that Performance Management Architect services communicate with a DB2 database.

- If the Performance Management Architect computer has DB2 9 Runtime Client installed, verify that an entry exists in the Global Assembly Cache. See [“Verifying DB2 9 Runtime Client for Existing Installations” on page 24](#).
- If the Performance Management Architect computer does not have the DB2 9 Runtime Client installed, you must install it. See [“Installing DB2 9 Runtime Client” on page 24](#).

Verifying DB2 9 Runtime Client for Existing Installations

➤ To verify the Global Assembly Cache entry:

- 1 Click **Start > Run**.
- 2 Enter `c:\windows\assembly` and click **OK**.
- 3 Scroll down the resulting list and locate `IBM.Data.DB2 9.0.0.2`.
- 4 Right-click `IBM.Data.DB2 9.0.0.2` and select **Properties**.
- 5 Click **Version**—at the top it should display **File Version: 9.1.0.2** or greater.

Tip:

You can also verify that the version 9 Runtime Client is installed, if this path and file exist: `C:\PROGRAM FILES\IBM\SQLLIB\BIN\NETF20\IBM.DATA.DB2.DLL` or `C:\PROGRAM FILES\IBM\SQLLIB_01\BIN\NETF20\IBM.DATA.DB2.DLL`.

To install the Runtime Client, see [“Installing DB2 9 Runtime Client” on page 24](#).

If you see this version or newer, the setup is complete, and nothing needs to be installed.

Installing DB2 9 Runtime Client

➤ To install DB2 9 Runtime Client:

- 1 Download DB2 9 Runtime Client using the following URL. (You must be a registered IBM user.)

http://www-306.ibm.com/software/data/db2/v9/index_download.html

- 2 In Next Steps, near the bottom of the page, click **DB2 Client**.
- 3 Click **Sign in** and enter your IBM ID and Password.
- 4 Select the driver based on your operating system and language preference, then click **Continue**.
- 5 Select choices for the radio button questions, and click **I Agree**.
- 6 Click **I Confirm** and select a download option:
 - Download Using HTTP
 - Download DirectorThe file size for `db2_v9_en_US_setup.exe` is 23 MB.
- 7 Click **Download Now** and save to a location on the computer where Performance Management Architect services are installed.
- 8 Double-click `db2_v9_en_US_setup.exe` to execute.

Note:

When you install the DB2 9 Runtime Client, it automatically detects an existing client and enables you to upgrade the existing version or add a new version copy to preserve the existing version. You should select the second option to ensure that existing applications or software that use the older Runtime Client are not affected.

- 9 Accept the defaults and complete the installation.

Configuring DB2.Net Data Provider

After you complete the Runtime Client installation you must configure DB2.Net Data Provider.

- To configure DB2.Net Data Provider:

- 1 Select **Start > Programs > IBM DB2 > Configure DB2 .NET Data Provider**.

This entry is added to the Global Assembly Cache automatically: `c:\windows\assembly`. The entry is listed as `IBM.Data.DB2`.

A version is listed next to the name, however, you should verify the File Version, not the version listed next to the name.

- 2 To verify the file version, right-click the item and select **Properties**. Click **Version** and verify the File Version number listed at the top of the tab.

The file version should be 9.1.0.2 or greater.

Installing and Configuring Essbase and Administration Services

To use Planning, you must install Essbase and Administration Services (server and console).

Business Rules is an installed component of Administration Services. If you want to use Business Rules with Planning, you must install Administration Services version 9.3.1. You can install and configure Administration Services on the middle tier, rather than the database tier.

If you are currently using an unsupported release of Essbase or Administration Services, you must upgrade to a supported release. The software is provided through Oracle E-Delivery.

For more information about installation and configuration of Essbase and Administration Services, see the *Essbase Administration Services Installation Guide* and

Note:

If you are using Planning on 64-bit Itanium, you must use 64-bit Essbase.

Verifying Essbase Installations

- To verify that the Essbase installation was successful:

- 1 **At a command prompt, enter either this, `$ARBORPATH/bin/startEssbase.sh`, or, if the path includes `$ARBORPATH/bin`, enter `/startEssbase.sh`**
 - a. Set these values when prompted:
 - b. When asked to confirm your choices, enter **1 (Yes)** to verify your entries, or **2 (No)** to reenter them.
 - c. Minimize the Essbase Server window.
- 2 **Open the sample application in Administration Services:**
 - a. Start the Administration Server and the Administration Services Console.
 - b. Log on to Administration Services:
 - i. Enter the Administration Server name: *<the computer hosting AAS>*
 - ii. Enter the Administration Services username
 - iii. Enter the Administration Services password
 - iv. Click **OK**.
 - c. In Enterprise View, expand **Essbase Servers** and select the Essbase Server instance to which you are connecting.
 - d. Select **Applications > Sample > Basic**.
 - e. Double-click **Outline**.

The Outline Editor window is displayed, showing a list of dimensions.
 - f. Click **Close**.
 - g. Right-click the Essbase Server instance and select **Disconnect**.
 - h. Select **File > Exit**.

After the Essbase installation is verified, continue with Planning installation on the middle tier.

3

Installing the Planning Middle Tier

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What Happens During Installation

The Planning setup program installs the files needed to run Planning, Performance Management Architect, and the common components used by multiple Hyperion products. Performance Management Architect is a component of the Planning installation. If you choose to use Classic Application Administration instead of Performance Management Architect, Classic Application Administration is automatically installed with Planning.

Note:

Ensure that Shared Services server, and Essbase are installed and configured before you install Planning.

By default, the Planning setup program performs these operations:

- Creates directories for a new installation
- Copies Planning software files to the Planning installation directory that you specify
- Copies common components to the `HYPERION_HOME` directory that you specify
- Installs the appropriate versions of Java Run-time Environment (JRE)
- Copies file to create a common RMI registry, called `HyperionRMIRegistry`, for products such as Planning, Business Rules, and Oracle's Hyperion® Translation Manager. (The RMI registry starts a service that enables Oracle's Hyperion® Application Link adapters to connect to their respective servers.)
- If Performance Management Architect is selected for installation on a 32-bit Windows machine, copies Performance Management Architect software files to the Performance Management Architect installation directory, creates an Performance Management Architect virtual directory in IIS, installs .NET Framework 2.0 if not installed, and installs C++ Runtime libraries.

Directories and Files Installed

The setup program installs Planning software files in one directory and internal components and third party products in another directory.

Files Installed in the Planning Directory

Planning software components are installed in the Planning directory that you specify during setup.

The default location is `<user_home>/Hyperion/Planning`.

This table describes the files that are installed in this directory.

Directory	Contents
lib	Jar files needed to run Planning
AppServer	Files required for Java application server deployment for Planning
bin	Executables, bat files, sh files and cmd files including Planning utilities. Also included here are Smartview.exe and Offline.exe.
config	Planning properties and ico files
uninstall	Executable to uninstall Planning Note: You can also uninstall using the Windows Control Panel (Add/Remove Programs).

Files Installed in the BPMA Directory

Performance Management Architect must be installed on a Windows 32-bit machine. Performance Management Architect software components are installed in the Performance Management Architect directory you specify during setup.

The default location is `<drive letter>:\Hyperion\BPMA`.

This table describes the files that are installed in this directory.

Directory	Contents
AppServer	Files required for Java application server deployment for Dimension server and Data Synchronization server
Common	Shared libraries for Performance Management Architect
Server	SQL files required for relational database configuration
docs	Performance Management Architect Administrator's Guide

Files Installed in the HYPERION_HOME Directory

The Planning setup program places internal and third party components used by multiple Hyperion products in a central location, called *Hyperion Home*. The Hyperion Home value is stored in `.hyperion.<hostname>` in the home directory..

Note:

To ensure that all installers have the permissions required to modify the `HYPERION_HOME` location, Hyperion recommends that all Hyperion applications be installed under one HYPERION user account.

The default location for Hyperion Home is `$HOME/Hyperion`. When you install, the installer searches for the `HYPERION_HOME` environment variable on the computer to which you are installing.

If the Hyperion Home location was previously defined for another Hyperion product, the installation uses the previously defined location. The location cannot be changed through the installer.

If the current installation is the first Hyperion installation on the computer, you can specify the location during installation.

Note:

If the `HYPERION_HOME` directory is mounted on an NFS so that one `HYPERION_HOME` location is visible across multiple computers, Shared Services can be installed to only one computer. If you try to install Shared Services to an additional computer, the previous installation is detected.

Various files are installed in the `HYPERION_HOME/common` directory by a default installation of Shared Services. Some common components, and thus some files and folders, are optional and may not be installed.

Table 1 Common-Component Folders Created in the Common Directory

Folder	Contents
ADM	Files required for Planning Details Analytic Driver Model driver.
appServers	Application server files
CLS	License services APIs
config	Hyperion Configuration Utility files
CSS	Files to support Hyperion external authentication
Docs	Product documentation files
EssbaseJavaAPI	Java driver used when embedding Essbase in other applications

Folder	Contents
EssbaseRTC	Essbase runtime client used when embedding Essbase in other applications
httpServers	Apache web server files for batteries included installation
HyperionLookAndFeel	Installer user interface files
JakartaCommons	Common development library files
JavaMail	Files to support sending e-mail via Java
JCE	JCE files for encryption, key generation and agreement, and MAC
JDBC	JDBC files
JRE	Java Runtime Environment files
lib	common internal library files
loggers	Files for external authentication logging
ODBC	ODBC drivers
Opatch	Oracle patching tool files; for future use
PERL	Scripting language files
SAP	SAP files
SharedServices	Supporting files for Shared Services
utilities	Utilities to change the location of Hyperion Home and export, import, or validate provisioning data
validation	Not used in this release
velocity	Not used in this release
XML	Common XML components

Files Installed in the deployments Directory

The `deployments` directory is a central location for storing the required Java application server specific files for each product. The default location is `/vol1/Hyperion`.

Files Installed in the Logs Directory

The log files belonging to most Hyperion products are created in `<HYPERION_HOME>/logs`. Log files are created in a product-specific folder. For example, Shared Services logs are created in `<HYPERION_HOME>/logs/SharedServices9`. Similarly, Configuration utility log files are created in `<HYPERION_HOME>/logs/config`.

Installation logs for each product are located in `<HYPERION_HOME>/logs/install/<product>`. Application server log locations for Planning are dependent on which application server you are using. See the *Hyperion Installation and Configuration Troubleshooting Guide* for details.

Installing Microsoft Internet Information Services (IIS) for Performance Management Architect on a Windows machine)

To use Performance Management Architect, you must have IIS 6.0 or 5.0 installed on the Dimension server. The IIS version depends on whether you are using Windows 2000 server or Windows 2003:

- IIS 5.0 for Windows 2000 Server
- IIS 6.0 for Windows 2003 Server

Verifying the IIS Installation

► To verify the IIS installation:

- 1 Select **Start > Programs > Administrative Tools > Component Services**, and double-click **Services**, or from Windows 2003, select **Start > Settings > Control Panel > Administrative Tools > Services**.
- 2 Check to see that the IIS services are running:
 - a. Select **IIS Admin Service**, and, if it is not started, click **Start**.
 - b. Select **World Wide Web Publishing Service**, and if it is not started, click **Start**.
 - c. If you did not see the services for IIS, make sure that IIS is installed.
 - i. In Control Panel, select **Add/Remove Programs**.
 - ii. Under **Windows Components**, select **Application Server** and look for **Internet Information Services (IIS)**.
 - iii. Install IIS if it is not already installed.

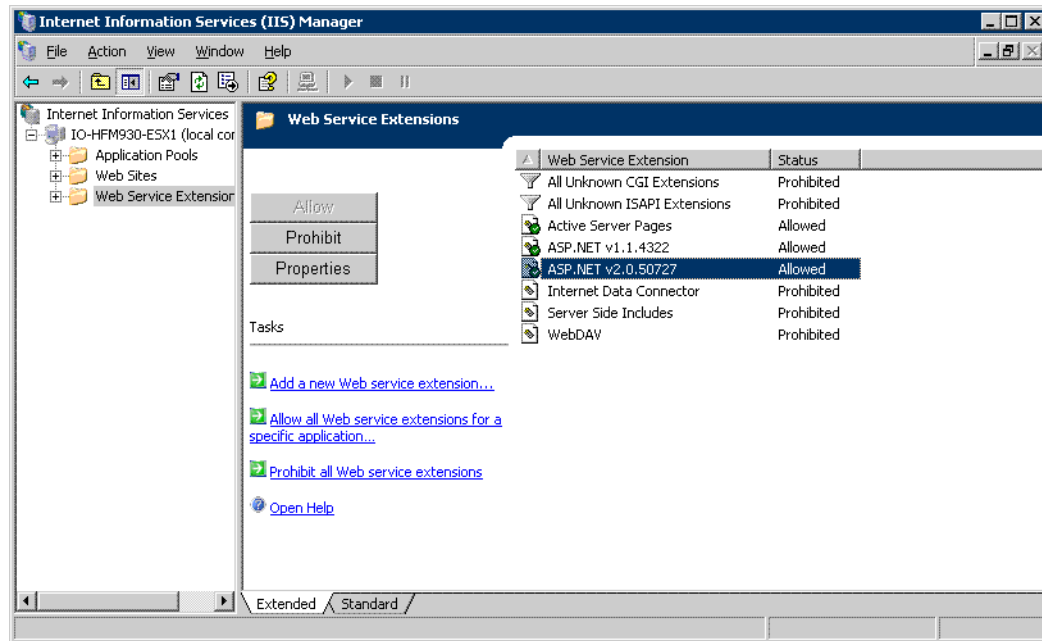
Verifying Existing .NET 2.0 Framework Installation (on Windows 2003)

Performance Management Architect requires installation of .NET 2.0 Framework on the machine where you install the Dimension server.

If you are using Windows 2003 and already have .NET 2.0 installed, you must perform an additional procedure to register and enable .NET 2.0 with IIS.

If you do not have .NET 2.0 Framework installed on your machine, the Planning or Financial Management setup program automatically installs it for you and you can skip the rest of this procedure.

- To check whether .NET 2.0 is installed on a Windows 2003 machine:
- 1 Open IIS Manager by doing one of the following:
 - a. Start > Programs > Administrative Tools > Internet Information Services Manager
 - b. Run inetmgr.
- 2 In the left panel, select **Web Service Extensions**. In the right panel, see whether **ASP.NET 2.0.50727** is listed.



- 3 If ASP.NET 2.0 is listed, enable it by checking that the **Status** column is set to **Allowed**.
- 4 If ASP.NET 2.0 was not listed and you have .NET 2.0 installed, register .NET 2.0 with IIS:
 - a. From the command prompt, go to this directory: C:\Windows\Microsoft.NET\Framework\v2.0.50727
 - b. enter `aspnet_regiis.exe -iru`.
 - c. Repeat steps 1, 2 and 3.

Installing Planning

Planning can be installed on a Windows 32 bit, 64 bit, or UNIX machine. If you are using Performance Management Architect to create and manage applications, it can only be installed on a Windows 32 bit machine.

Note:

To ensure that all installers have the permissions required to modify the *HYPERION_HOME* location, Hyperion recommends that all Hyperion applications be installed under one HYPERION user account.

➤ To install Planning:

- 1 If you are upgrading from a previous Planning release, back up your Planning properties file (HspJSHome.properties) before installing Planning 9.3.1. This file is located under your application server folder and is needed during the upgrade procedures. See [Chapter 9, “Upgrading to Planning 9.3.1.”](#)
- 2 If you downloaded Planning software from Oracle E-Delivery, navigate to the directory where you downloaded the installation program, and run `setup.bin`.
- 3 Review the **Welcome** screen, then click **Next**.
- 4 From the drop-down list, select the country in which you are installing Planning. Then click **Next**.
- 5 Read the license agreement, then select **I AGREE** to accept the terms. Click **Next**.
- 6 Click **Next** to accept the default directory for HYPERION_HOME, or click **Browse** and navigate to an installation directory, and click .

If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash (-), underscore (_), backslash (\), forward slash (/), dot (.), colon (:). The colon (:) is supported for Windows platforms only to specify the drive (for example, C: \).

Note:

If a HYPERION_HOME location was previously defined, a message is displayed saying that the system detected the previously defined location. Click Next to proceed with the installation. If you ever need to change the location of HYPERION_HOME, see [“Changing the Hyperion Home Location” on page 35](#)

- 7 Click **Next** to accept the default directory for installation of Planning files, or click **Browse** to select an installation directory, and click **Next**.

If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash (-), underscore (_), backslash (\), forward slash (/), dot (.), colon (:). The colon (:) is supported for Windows platforms only to specify the drive (for example, C: \).

- 8 Select **Typical** or **Custom** depending on whether you are installing on the same machine:

Note:

Business Rules is now a component of Administration Services and is installed automatically when you install Administration Services. For more information, see the *Essbase Administration Services Installation Guide*

- 9 Review the selected components and destination installation directory, and click **Next** to continue the installation or click **Back** to make changes.
- 10 After the installation is complete, click **Finish**.
- 11 **Optional:** If you are installing Planning on a 64-bit machine, you can only install Performance Management Architect on a Windows 32-bit machine.
 - a. Run the 32-bit Windows Planning setup program to install Performance Management Architect by completing steps 1–6 above.

- b. Select the **Custom** install option and click **Next**.
- c. Optionally, select Performance Management Architect and click **Next**.
- d. Continue the installation at step 8.

12 If you are installing Performance Management Architect you must install it on a 32-bit Windows machine.

- a. If you downloaded Planning software from Oracle E-Delivery, navigate to the directory where you downloaded the installation program, and run `setup.bin`.
- b. Review the Welcome screen, then click **Next**.
- c. From the drop-down list, select the location for Planning installation. Then click **Next**.
- d. Read the license agreement, then select **I AGREE** to accept the terms. Click **Next**.
- e. Click **Next** to accept the default directory for `HYPERION_HOME`, or click **Browse** and navigate to a different installation directory, and click **Next**. If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash (-), underscore (_), backslash (\), forward slash (/), dot (.), colon (:). The colon character (:) is supported for Windows platforms to specify the drive (for example, C:\).

Note:

If you already have an existing `HYPERION_HOME` location, a message is displayed saying that the system detected the current location. Click **Next** to proceed with the installation.

- f. Click **Next** to accept the default directory for installation of Performance Management Architect files, or click **Browse** to select a different install directory and click **Next**. If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash (-), underscore (_), backslash (\), forward slash (/), dot (.), colon (:). The colon character (:) is supported for Windows platforms to specify the drive (for example, C:\).
- g. Select **Custom** and click **Next**.
- h. Select **Enterprise Performance Management Architect** (includes Application Server for Dimension server and Data Sync server and Web Server for EPM Architect Web Tier component). Then click **Next**.
- i. Verify the selected components and destination installation directory, then click **Next** to start copying files or click **Back** to make a change.
- j. If you are installing Performance Management Architect application server and do not have .NET Framework 2.0 installed, you are prompted to install it. Select **Install Microsoft .Net Framework 2.0 and continue** to have .NET 2.0 automatically installed.
- k. Click **Finish**.
- l. If you installed Performance Management Architect and had .NET automatically installed, select **Yes** to reboot your machine.

Changing the Hyperion Home Location

After Hyperion Home is defined through the product installation, you can run a migration utility to change the Hyperion Home location.

The migration utility updates the `.hyperion.<HOSTNAME>` file, which resides in the directory that contains the environment variable. Login initialization files, such as `.profile` and `.login` are not updated.

Hyperion Home Migration Utility is provided with the Shared Services installation.

► To change the Hyperion Home location:

1 Launch the migration utility:

- Choose a method:
 - In XWindows, change to `<HYPERION_HOME>/common/utilities/HyperionHomeTool/9.3.1/bin`. Then type `migrationtool.sh`.
 - In a UNIX console, change to `<HYPERION_HOME>/common/utilities/HyperionHomeTool/9.3.1/bin`. Then type `migrationtool.sh -console`.

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

Do not choose a `HYPERION_HOME` location that contains a space character. For example, `$HOME/Program Files` is not acceptable.

Installing a Java Application Server

Note:

Planning only supports Tomcat on 64-bit Itanium.

Before you configure Planning, you must install a Java application server. You can use Oracle 10g (10.1.2.0.2 or 10.1.3.1), BEA WebLogic 9.1 or 8.1.6, IBM WebSphere 6.0.2.11, or 6.1, or Apache Tomcat 5.0.28.

Note:

You must use a 32-bit version of an application server running on AIX or Solaris.

Installing Oracle 10g

To use Oracle 10g (10.1.2.0.2 or 10.1.3.1) as your Java application server, accept all default settings. The typical Oracle 10g installation uses its own internal Web server. Oracle 10g can only be deployed manually. For instructions on configuring Oracle 10g as your Java application

server, see [“Manually Deploying Planning to Oracle 10g \(10.1.3.1\) Application Server ”](#) on page 153.

Installing WebLogic

To use WebLogic as your Java application server, accept all default settings. The typical WebLogic installation uses its own internal Web server.

Installing WebSphere

To use IBM WebSphere as your Java application server, follow the IBM installation instructions and accept all default settings. Remember to record the password. Typically, WebSphere installation includes the IBM HTTP server as the Web server.

Caution!

If you are using WebSphere 6.0.x, you must back up the `jdom.jar` file (or `jdom-b9.jar`) installed by WebSphere (located at `/opt/WebSphere/AppServer/java/lib/jdom-b9.jar`) and replace it with the `jdom.jar` that Planning installed in the `/Hyperion/Planning/lib` directory. Until you do so, you cannot deploy a Planning Application View in Performance Management Architect or a Planning application in Classic application administration.

Using Apache Tomcat

The Planning setup program installs Tomcat 5.0.28. You use the Hyperion Configuration Utility to deploy Tomcat as your Java application server.

Note:

Hyperion provides Apache Tomcat on the installation media for convenience. Hyperion does not own or maintain the Apache Tomcat application server and is not responsible for problems that you may encounter with its functionality. Hyperion, however, does fully support the use of Apache Tomcat in its products. In deployments where customers require high availability or failover, Hyperion recommends deployment of a commercially supported application server that support these capabilities.

Installing the Web Server

Planning and Performance Management Architect require a Web server in addition to a Java application server. You can use an internal Web server provided with your Java application server, or an external Web server.

Note:

Performance Management Architect requires installation of Microsoft IIS 6.0 or 5.0.

Internal Web servers that you can use:

- WebLogic's own internal Web server. The WebLogic Web server is automatically installed during a WebLogic installation. See the BEA WebLogic documentation for details.
- WebSphere's own internal Web server. See the IBM WebSphere documentation for details.
- Tomcat's own internal Web server

4

Configuring and Setting Up Planning

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Hyperion Configuration Utility

Oracle's Hyperion® Configuration Utility™ is a common tool that installs automatically with Hyperion products. Although you must use it to set up new products that you install, it also enables you to reconfigure existing products and upgraded products. Use the utility on each computer to which a product is installed. Configuration of Planning involves these tasks:

- Product option activation — If prompted, select the product features that you are authorized to use in order to comply with your license agreement. This will be skipped if there are no specific features to select.
- Shared Services registration — To use Shared Services to provision and share users among Hyperion product applications.
- Relational database configuration—To store and retrieve application data in a database repository and create the PlanningSystemDB.properties file.
- Application server deployment—To deploy the application automatically to an application server.
- Product-specific Configuration—Required in Planning to register a product instance and configure a datasource.
- Shared Services deregistration — To deregister products from with Shared Services before upgrading or uninstalling these products.

For information about the order of configuration tasks, acceptable characters, and resolving configuration issues, see:

- “Task Sequence ” on page 40
- “Restricted Characters ” on page 40
- “Troubleshooting ” on page 40

Task Sequence

Hyperion recommends that you configure products separately and perform all configuration tasks. However, you can configure products simultaneously performing all, or specific, configuration tasks.

Restricted Characters

Only enter alphanumeric, dash (-), dot (.), underscores (_), and tildes (~) during configuration. Tildes are only supported on Microsoft Windows. All other characters are not supported.

Troubleshooting

Terminating configuration for one product does not stop the configuration of other products. All configuration warnings and errors are logged as follows:

UNIX — `$HYPERION_HOME/logs/config`

If you encounter errors, perform these tasks:

- Configure products individually.
- See the *Hyperion Installation and Configuration Troubleshooting Guide* for information about configuration checks, debugging using logs, troubleshooting methodology, and solutions to common configuration issues.

Satisfying Initial Requirements

If you are using Hyperion Configuration Utility for the first time, perform these tasks:

Table 2 Configuration Requirements

Task	Reference
Satisfy system and product-specific requirements.	“System Requirements” and “Planning Hyperion Installations” in the <i>Hyperion Installation Start Here</i>
Gather the information you need to configure products.	“Hyperion Configuration Utility Worksheets” in the <i>Hyperion Installation Start Here</i>
Install, configure, and start the Shared Services server.	<i>Hyperion Shared Services Installation Guide</i>

Before you begin, ensure that you have completed all necessary installation and configuration tasks for Shared Services, and Essbase (including Administration Services).

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

Note:

Before beginning the configuration process, ensure that you have installed the Java application server you plan to use. Also, ensure that Shared Services server is up and running for registration

of products with Shared Services. Configuration of Planning requires that you start Essbase server before using the Configure Datasource task in the Hyperion Configuration Utility.

Configuring Planning

Run Hyperion Configuration Utility on the computer hosting the products to configure or reconfigure.

► To configure Planning:

1 Launch Hyperion Configuration Utility as follows:

- At the end of installation by selecting **Launch Hyperion Configuration Utility** on the last panel.
- Using a method:

On UNIX:

- Change to `<HYPERION_HOME>/common/config` and type `configtool.sh`.
- Change to `<HYPERION_HOME>/common/config` and type `configtool.sh - console`.

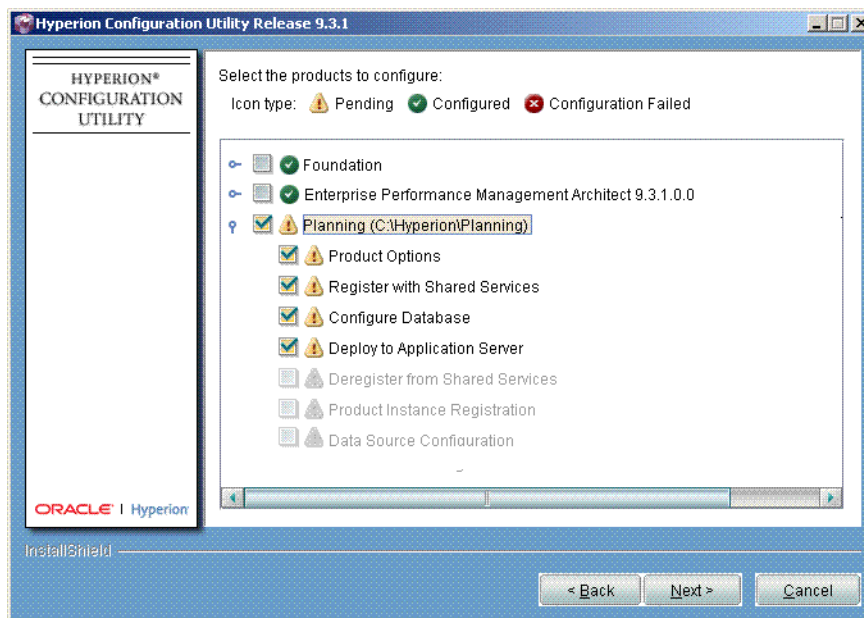
2 Select the language in which to configure and click **Next.**

3 On the Welcome page, click **Next.**

A list of installed products is displayed. Icons next to the product name indicate the status of the configuration for each product:

- **Pending**—Product is not yet configured.
- **Configured**—Product is successfully configured.
- **Configuration Failed**—Product configuration was attempted but unsuccessful.

4 Select Planning, and tasks will be automatically selected that you need to perform. Then click **Next.**



5 Perform the following tasks:

Table 3 Configuration Tasks

Selection	Task
Product Options	<p>If prompted, select the product features that you are authorized to use based on your purchase and licensing agreement. See “Hyperion License Compliance” in <i>Hyperion Installation Start Here</i>.</p> <p>During product configuration, Hyperion Configuration Utility copies <code>registry.properties</code> to <code><HYPERION_HOME>\common\config</code> on the server on which you ran Hyperion Configuration Utility. After configuration, open this file in any text editor to confirm and specify which product options are activated. See “Hyperion License Compliance” in <i>Hyperion Installation Start Here</i></p>
Shared Services Registration	<p>Make sure that the Shared Services server is running. Review the details displayed and enter your Shared Services password (default is <i>password</i>) “Registering With Shared Services” on page 43.</p>
Configure Database	<ol style="list-style-type: none"> Start your database Select the database type. Enter the information in “Configuring Databases” on page 44.
Deploy to Application Server	<ol style="list-style-type: none"> Start the application server. Select the application server, then an option: <ul style="list-style-type: none"> Automatic— Hyperion Configuration Utility deploys all files to the application server, resulting in no or minimal post-deployment tasks: <ul style="list-style-type: none"> WebLogic: If disk space is inadequate, specify another location for the <code>WAR</code> file and redeploy. WebSphere: If disk space is inadequate, Hyperion Configuration Utility places <code>java.io.tmpdir</code> in <code><HYPERION_HOME>/temp</code>. After deployment, the <code>temp</code> folder is deleted.

Selection	Task
	<ul style="list-style-type: none"> Manual— In Planning, you do not need to select the Manual option in the Hyperion Configuration Utility in order to perform a manual deployment. The EAR or WAR file is placed in this directory, enabling you to manually deploy after configuration: <pre> ProductHome>/<AppServer>/InstallableApps/common WebLogic 8.1.x — <ProductHome>/<AppServer>/ InstallableApps </pre> <p>c. Enter the information in “Deploying to the Application Server ” on page 45.</p>
Create a Planning Instance	Once you have completed the first set of tasks, return to the product selection panel to Create a Planning Instance. See “Creating a Planning Instance” on page 49
Configure a Data Source	After creating the instance, return to the product selection panel and Configure a Datasource. See “Configuring a Datasource” on page 50

The status of each task is displayed.

If configuration is successful, perform any required post-configuration tasks and start the product. If errors display, perform these tasks:

- Configure products individually and perform tasks separately.
- See the *Hyperion Installation and Configuration Troubleshooting Guide* for information about resolving configuration issues.

Configuration time depends on the products and tasks you selected. Progress is recorded in `configtool.log` as follows:

```
<HYPERION_HOME>/logs/config
```

6 Click Finish.

- 7 Important:** After you configure each product, you must open `registry.properties`—in `<HYPERION_HOME>/common/config` on the server on which you ran Hyperion Configuration Utility—to review and edit the product options. You must complete this step to ensure you comply with your license agreement and to activate features you are licensed to use. See [“Hyperion License Compliance” in Hyperion Installation Start Here](#).

Selecting Product Options

If you have additional modules such as Capital Expense Planning or Workforce Planning, you will be prompted to select those options from a list. Otherwise, the Product Options panel is automatically checked as completed and no action needs to be taken.

Registering With Shared Services

By default, the user you specify during registration is pre-provisioned as `admin`. This enables you to log on to Shared Services after configuration using `admin/password`, to create and provision users.

Table 4 Shared Services Registration

Field	Description
Server Name	The name of the computer where the Shared Services server is installed. Caution! Do not specify an IP address, especially in DHCP environments, or enter restricted characters.
Port	The default or custom Shared Services server port number.
User	The username of the Shared Services Administrator.
Password	The password of the Shared Services Administrator.
SSL	Select to use Secure Sockets Layer for encryption. See the <i>Hyperion Product SSL Configuration Guide</i> .

Configuring Databases

When you configure Hyperion products to use a database, Hyperion Configuration Utility ensures that the database is connected and is a supported database type. For a list of supported databases for this release, see *Hyperion Installation Start Here*.

In Planning, the configuring a database task also generates the PlanningSystemDB.properties file. This properties file contains the location of the relational database that each Planning application uses. You must regenerate it using the Configuring a Database option only if you accidentally delete the file or change databases.

The first time you configure, a default database name (hypdb), and username (hypuser), is displayed. Change the defaults to match the name of the database and user you already created.

Note:

If you perform the Configure a Database task after initial installation, ensure that Planning is registered with Shared Services and deployed to an application server before configuring the database.

Note:

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

Note:

If you are configuring a database for Planning and a previously configured database is detected, you are prompted to drop all tables and create a new database or reuse the existing database.

Table 5 Database Configuration

Field	Description
Server	Name of the computer or server hosting the database.
Port	Server port number on which the database listens.
Product	Name of each product and its installation location.
Database or SID (Oracle only)	Database name or the Oracle system identification (database instance). Do not use restricted characters.
Username	The name of the database owner.
Password	The password of the database owner. Note: If this changes, reconfigure as described in the <i>Hyperion Installation Start Here</i> .
Data Tablespace (Oracle)	Name of an existing tablespace used to create tables. The data tablespace is the logical portion of the database used to allocate storage for table data.
Index Tablespace (Oracle)	Name of an existing tablespace used to create database indexes. The index tablespace is the logical portion of the database used to allocate storage for index data.

Deploying to the Application Server

You can deploy automatically or manually:

- Automatic deployment —Use Hyperion Configuration Utility to automatically deploy all files to the application server. Select the Automatic deployment option for the application server.
- Manual deployment—Use Hyperion Configuration Utility to populate and place the product archive in the appropriate directory. Select the Manual deployment option for the application server. After configuration, perform the remainder of the deployment tasks. See [“About Manual Configuration” on page 143](#).

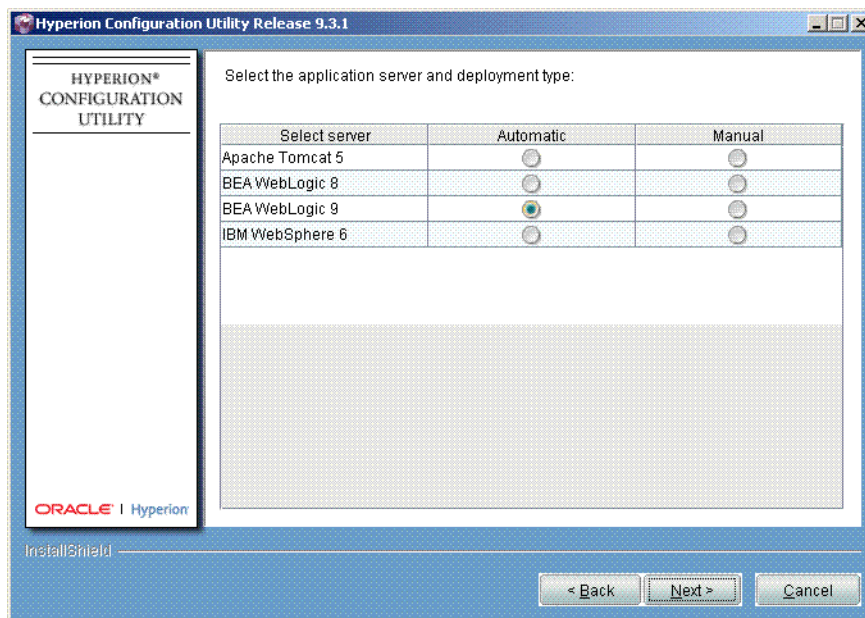
To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use one of the following:

- Oracle OC4J instance
- WebLogic server
- WebSphere application server

Deploying more than one Web application to the same OC4J instance, WebLogic server, or WebSphere application server may yield unsuccessful results.

Note:

On WebLogic, a default username and password of `hyperion` is used internally for deployment.



Oracle 10.1.2.0.2 or Oracle 10.1.3.1 can be used as a Java application server but must be manually deployed. If you are not automatically deploying any Java application server, see [“About Manual Configuration” on page 143](#). In Planning, you do not need to select the Manual option in the Hyperion Configuration Utility in order to perform a manual deployment.

Note:

For Planning on an HP-UX 64-bit machine, you can only deploy to Tomcat.

Table 6 Automatic Deployment Parameters

Field	Description
Location	Path to the application server installation directory: <ul style="list-style-type: none"> WebSphere Base: or /opt/WebSphere/AppServer WebSphere Express: /opt/IBM/WebSphere/Express51/AppServer WebLogic 8.1.x: /opt/bea/weblogic81 WebLogic 9.1.x: /opt/bea/weblogic91
Deploy as a service	Selected by default to register the web application as a Windows service listed in Windows Control Panel. See “Startup Dependencies” in the <i>Hyperion Installation Start Here</i> .

Field	Description
Profile (WebSphere)	Name of the profile where the applications are deployed. By default, all applications deploy to the same profile. To change the profile name, see “WebSphere and WebLogic 9.1.x” on page 47 .
Domain (WebLogic)	Default name of the domain where the applications are deployed. For WebLogic 9.1.x, all applications deploy to the same domain. To change the domain name, see “WebSphere and WebLogic 9.1.x” on page 47 .
Component	Products being deployed. Some products display as components.
Server Name	Enter the name of the server where you will access the product. Do not include spaces. This name is used as the product directory name in <code><HYPERION_HOME>/deployments</code>
Port	To change the default port, enter a unique port number that does not exceed 1025 to avoid conflicts with third-party port assignments. See “Ports” in the <i>Hyperion Installation Start Here</i> .

Caution!

If you are using WebSphere 6.0.x, you must back up the `jdom.jar` file (or `jdom-b9.jar`) installed by WebSphere (located at `/opt/WebSphere/AppServer/java/lib/jdom-b9.jar`) and replace it with the `jdom.jar` that Planning installed in the `/Hyperion/Planning/lib` directory. Until you do so, you cannot deploy a Planning Application View in Performance Management Architect or a Planning application in Classic application administration.

What Happens During Deployment

WebSphere and WebLogic 9.1.x

Hyperion Configuration Utility deploys each application to the same WebSphere profile or WebLogic domain. The profile or domain is created when the first application is deployed. Each application runs in a separate JVM.

Hyperion Configuration Utility deploys the application to:

```
HYPERION_HOME/deployments/<AppServNameAndVersion>
```

Under this directory, the `bin` directory contains start and stop scripts for all deployed applications. For each application, there is also a `setCustomParams<Product>.bat` file or a shell script where `JAVA_OPTIONS` can be changed when starting using start scripts.

To change the default profile or domain directory, modify the deployment directory parameter in the `weblogic.properties` or `websphere.properties` in:

```
HYPERION_HOME/common/config/resources/<AppServName>/resources
```

Note:

It is not recommended to change other parameters in this file.

WebLogic 8.1.x

Deploying to a single domain for WebLogic 8.1.x is not supported. For WebLogic 8.1.x, Hyperion Configuration Utility deploys the application to:

```
PRODUCT_HOME/AppServer/InstalledApps/<AppServName>/<Version>
```

Increasing the Heap Size for Java Application Servers

Depending on the size of your environment, you may need to increase the heap size for your Java application server in order to get better performance or to upgrade large applications. While the default can be used in a test environment (single server type configuration), the heap size needs to be increased for use in a production environment (multiple servers).

- To increase the heap size for Weblogic 9.1 or 8.1.6:

- 1 Open the startup script, (for example, for Planning: `startHyperionPlanning.sh`).
- 2 Add this line to set the heap size (this is an example): `set MEM_ARGS=-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for WebSphere 6:

- 1 For Planning, from the WebSphere Admin console, select **Servers > Application Servers**.
- 2 Select **HyperionPlanning**. (For Performance Management Architect, substitute the Performance Management Architect server name for HyperionPlanning.)
- 3 Under Server Infrastructure, expand **Java and Process Management > Process Definition**.
- 4 Increase the Max Heap Size. The default Max Heap Size is 512 MB.

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for Tomcat 5.0.28:

- 1 Open the startup script, (for example, `startHyperionPlanning.sh`).
- 2 Search for the following: `set JAVA_OPTS=-server`
- 3 Append the following to the end of that line (this is an example): `-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

Note:

If the Tomcat application server does not start after making this change, replace the word “start” with “run” in the `startup.bat` file.

Planning-Specific Configuration Tasks

There are two tasks required for Planning configuration using the Hyperion Configuration Utility.

- Product instance registration
- Configuring a datasource

Creating a Planning Instance

An instance is a name for a group of Planning applications. An instance may contain one or many applications associated with it. Each application gets associated with an instance when an application is created. When you create an instance, it displays in the `HSPSYS_CLUSTER` table in the system database. The active instance name gets written as the `INSTANCE` property value in `PlanningSystemDB.properties`.

You can designate an instance as the “active instance” during instance creation or at any time using the “Product Instance Registration” option in the Hyperion Configuration Utility. If you designate an instance as the “active instance,” only applications associated with that instance are displayed in Workspace.

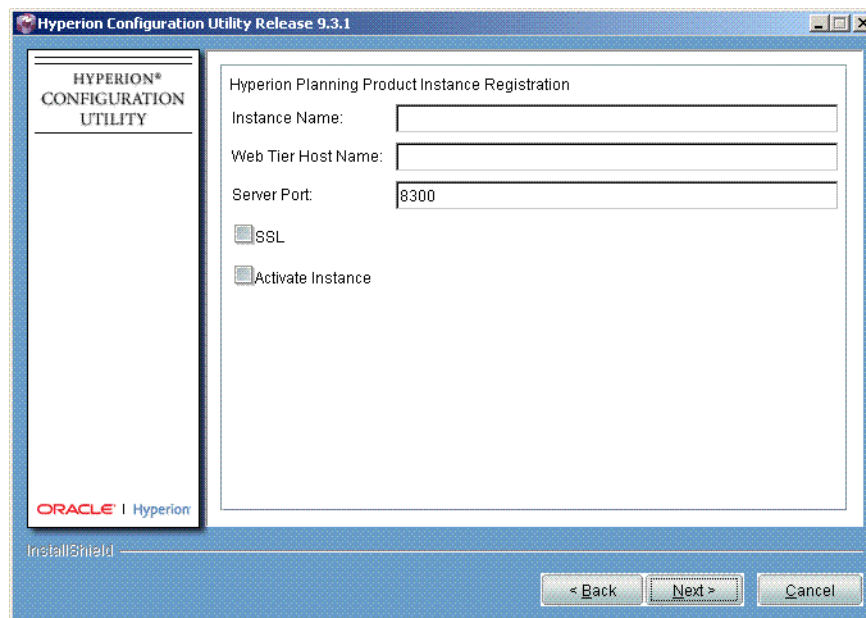
Caution!

If you add or change the active instance, you must restart the Planning application server in order for the updated application list to be displayed in Workspace.

Applications get associated with an instance when an application is created, and that association can be modified using the “Re-associate Instance and Application” task. This is useful, for example, if you decide that you want an application associated with a different server. For details, see the *Hyperion Planning - System 9 Administrator's Guide*.

➤ To create the Planning instance:

- 1 From the product selection panel displayed after launching the Hyperion Configuration Utility, select **Planning** and **Product Instance Registration**. Then click **Next**.
 - a. In Hyperion Planning Instance Registration, select **Create Instance**. Then click **Next**.



- b. Enter an instance name.
- c. Enter the full name of the machine where you installed the Planning Web Server component.

Note:

In a multi-server environment, this should be the load balancer, and in a single server environment it is the same as the Planning server.

- d. Leave the default server port (8300) or make a change if necessary. The port number should be the port used for application server deployment.
 - e. To enable SSL (Secure Sockets Layer), select **SSL**.
 - f. Select **Activate Instance** if you only want to display those applications in Workspace that are associated with this instance. If you want to see all applications in Workspace, do not select this checkbox.
 - g. Click **Next**.
- 2** Select **Yes** and click **Next** in response to the prompt to go back to the product selection panel and configure a data source.

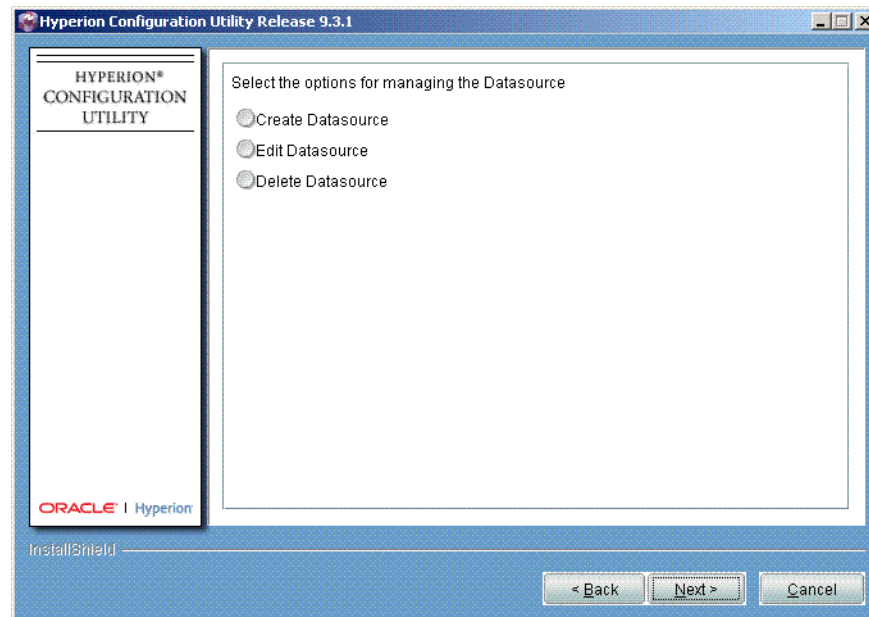
Configuring a Datasource

A datasource must be created to link the relational database and the Essbase Server. A datasource must be created each time you create an application and must be associated with an instance. Ensure the Essbase Server is running before using this task.

➤ To configure a datasource:

- 1** From the product selection panel displayed after launching the Hyperion Configuration Utility, select **Planning** and **Data Source Configuration**. Then click **Next**.

- a. Select **Create Datasource**.



- b. Enter a name for the datasource and description. Then click **Next**.
- c. Select the instance you created during Product Instance Registration to associate it with the data source.
- d. Select a database type (SQL, Oracle, or DB2). Then, click **Next**.
- e. Enter the database details:
- i. Server hosting the database
 - ii. Accept the default port or make a change. Defaults are: SQL (1433), Oracle (1521), or DB2 (50000)
 - iii. Name of the product you are configuring (i.e. Planning).
 - iv. Database name
 - v. Database username and password
- f. Enter details about the Essbase server:
- i. Essbase server name
 - ii. Essbase username and password
 - iii. Click **Next**.

2 Select **No** and click **Finish**.

3 If you are using Performance Management Architect, continue by completing the configuration tasks in the next chapter.

Note:

Performance Management Architect must be installed and configured on a Windows 32-bit machine.

Review and Edit Product Options

Important: After you configure Planning, you must open the `registry.properties`—in `<HYPERION_HOME>\common\config` on the server on which you ran the Hyperion Configuration Utility—to review and edit the product options. You must complete this step to ensure you comply with your license agreement and to activate features you are licensed to use. See “Hyperion License Compliance” in *Hyperion Installation Start Here*.

Reconfiguring Products

Hyperion Configuration Utility enables you to reconfigure products to incorporate changes in your environment such as a different application server.

To reconfigure, launch Hyperion Configuration Utility on the computer hosting the product, and follow the procedures in this chapter.

Note:

If you reconfigure a database, restart the application server afterward.

5

Configuring and Setting Up Performance Management Architect

In This Chapter

Task Sequence for Performance Management Architect	53
Registering Performance Management Architect with Shared Services.....	54
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Deploying Performance Management Architect to an Application Server	57

Task Sequence for Performance Management Architect

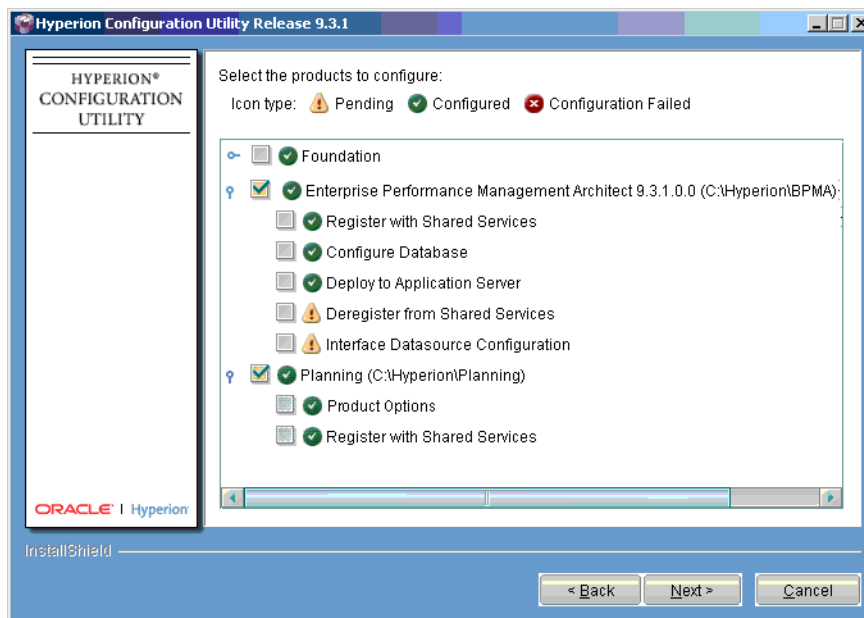
Follow this sequence to configure Performance Management Architect for the first time. If you are not familiar with using the Hyperion Configuration Utility, see [“Satisfying Initial Requirements” on page 40](#) before you begin. Performance Management Architect can only be configured on a Windows 32-bit machine. If you are using Classic Application Administration to create applications, skip this chapter.

Hyperion Configuration Utility enables you to perform multiple configuration tasks in one session. Perform these tasks to configure Performance Management Architect:

- Shared Services registration
- Database configuration
- Application server deployment

All input for Shared Services registration, database configuration, and application server deployment is gathered by Hyperion Configuration Utility and configuration for these tasks occurs once at the end.

There is an additional task in the Hyperion Configuration Utility under Performance Management Architect, called Interface Datasource Configuration. This task is required if you want to use interface tables in Performance Management Architect. See the Managing Dimension chapter and the Synchronizing Data chapter of the *Hyperion Enterprise Performance Management Architect Administrator's Guide*.



What you see on the product selection dialog depends on the components installed on that machine.

Registering Performance Management Architect with Shared Services

Shared Services functionality is programmed into Hyperion products to enable user provisioning, and single-sign on among Hyperion product applications. By default, the user you specify during registration is pre-provisioned as `admin`. This enables you to log on to Shared Services after configuration using `admin/password`, to create and provision users.

Products that implement Shared Services functionality require access to the Shared Services server and to a database for Shared Services. When a product is registered with Shared Services, a registration file is created under its corresponding product directory in Shared Services.

- To register Performance Management Architect with Shared Services:

1 Specify Shared Services server information:

Table 7 Shared Services Registration

Field	Description
Server Name	The name of the computer where the Shared Services server is installed. Caution! Do not specify an IP address, especially in DHCP environments, or enter restricted characters.
Port	The default or custom Shared Services server port number.
User	The username of the Shared Services Administrator.

Field	Description
Password	The password of the Shared Services Administrator.
SSL	Select to use Secure Sockets Layer for encryption. See the <i>Hyperion Product SSL Configuration Guide</i> .

- 2 Click **Next** to configure the database for Performance Management Architect.

Configuring a Performance Management Architect Database

The Performance Management Architect database is used for the Dimension server. When you configure Hyperion products to use a database, Hyperion Configuration Utility ensures that the database is connected and is a supported database type.

For a list of supported databases for this release, see *Hyperion Installation Start Here*.

If you changed a database-owner password in your relational database, you need to change it in the Hyperion Configuration Utility. For details, see the *Hyperion Installation Start Here*. If you are configuring a Microsoft SQL Server database, Hyperion Configuration Utility supports Windows Authentication for a SQL Server connection. For instructions, see ???.

Note:

Performance Management Architect does not support Windows authentication for a Microsoft SQL Server database.

- To configure a Performance Management Architect database:

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

Note:

To use DB2 with Performance Management Architect, there are additional requirements for installing .NET Data Provider and DB2 Runtime Client. See [“Creating IBM DB2 Databases for Performance Management Architect” on page 23](#).

The database configuration details page is displayed. This is an example using an Oracle database.

Hyperion Configuration Utility Release 9.3.1

HYPERION* CONFIGURATION UTILITY

Database Configuration Details

Database type: Oracle

Database details:

Server: myserver.hyperion.com

Port: 1521

Product	SID	User Name	Password	Data Tablespace	Index Tablespace
Enterprise...	oradb	jsmith	*****	<default>	<default>

ORACLE | Hyperion

InstallShield

< Back Next > Cancel

2 Specify database information:

Table 8 Database Configuration

Field	Description
Server	Name of the computer or server hosting the database.
Port	Server port number on which the database listens.
Product	Name of each product and its installation location.
Database or SID (Oracle only)	Database name or the Oracle system identification (database instance). Do not use restricted characters.
Username	The name of the database owner.
Password	The password of the database owner. Note: If this changes, reconfigure as described in the <i>Hyperion Installation Start Here</i> .
Data Tablespace (Oracle)	Name of an existing tablespace used to create tables. The data tablespace is the logical portion of the database used to allocate storage for table data.
Index Tablespace (Oracle)	Name of an existing tablespace used to create database indexes. The index tablespace is the logical portion of the database used to allocate storage for index data.

3 Click **Next** after viewing configuration status.

4 Click **Next** to continue configuring Performance Management Architect by deploying to an application server.

Deploying Performance Management Architect to an Application Server

Performance Management Architect application server deployment involves two components: the Performance Management Architect server (EPMWebTier) and the Data Synchronization server (EPMDataSynchronizer).

These Java application servers are supported for Performance Management Architect.

- WebLogic 9.1 or 8.1.6
- WebSphere 6.0.2.11 or 6.1
- Tomcat 5.0.28
- Oracle 10g (10.1.2.0.2 or 10.1.3.1) as a manual deployment only

Automatic and Manual Deployments

You can deploy automatically or manually:

- Automatic deployment —Use Hyperion Configuration Utility to automatically deploy all files to the application server. Select the Automatic deployment option for the application server.
- Manual deployment—Use Hyperion Configuration Utility to populate and place the product archive in the appropriate directory. Select the Manual deployment option for the application server. After configuration, perform the remainder of the deployment tasks.

Deploying to an Application Server

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use one of the following:

- Oracle OC4J instance
- WebLogic server
- WebSphere application server

Deploying more than one Web application to the same OC4J instance, WebLogic server, or WebSphere application server may yield unsuccessful results.

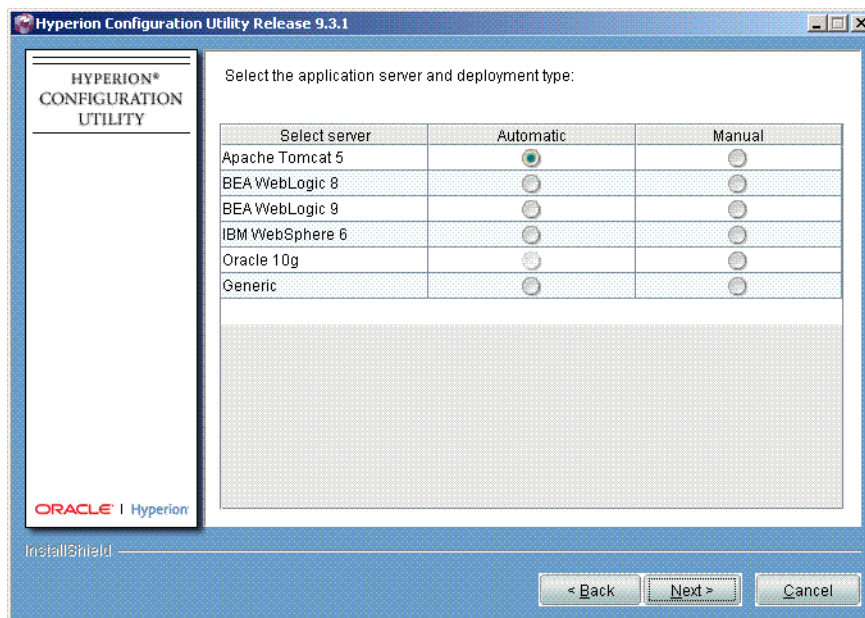
Note:

On WebLogic, a default username and password of `hyperion` is used internally for deployment.

➤ To deploy Performance Management Architect to an application server:

1 Select the application server you are using and select Automatic as the deployment type, and click **Next**.

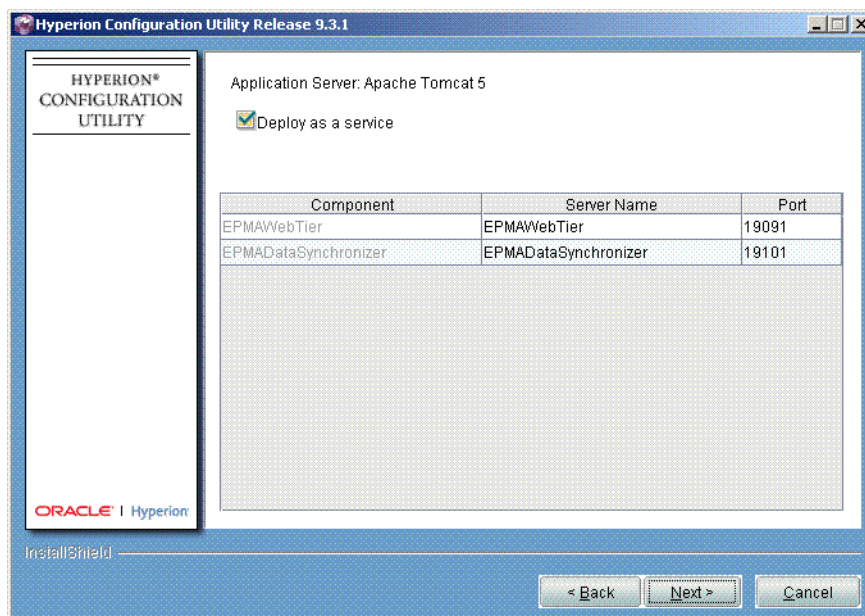
To deploy Performance Management Architect to Oracle 10g, select Manual.



Note:

For all application servers, for automatic deployment, Hyperion Configuration Utility determines whether the available disk space is adequate for the size of the EAR or WAR file (as specified in the product configuration file). If the disk space is inadequate, you must specify a location for storage of the EAR or WAR file and repeat the deployment process. On WebSphere, for automatic deployment, when deployment starts, Hyperion Configuration Utility determines whether the available disk space for the `java.io.tmpdir` folder is adequate. If the disk space is inadequate, Hyperion Configuration Utility relocates the `java.io.tmpdir` file to the directory. After deployment is complete, the `temp` folder is deleted.

An example (using Tomcat):



2 In the **Application Server** dialog box, specify application server information:

Table 9 Automatic Deployment Parameters

Field	Description
Location	Path to the application server installation directory: <ul style="list-style-type: none">● WebSphere Base: or /opt/WebSphere/AppServer● WebSphere Express: /opt/IBM/WebSphere/Express51/AppServer● WebLogic 8.1.x: /opt/bea/weblogic81● WebLogic 9.1.x: /opt/bea/weblogic91
Deploy as a service	Selected by default to register the web application as a Windows service listed in Windows Control Panel. See “Startup Dependencies” in the <i>Hyperion Installation Start Here</i> .
Profile (WebSphere)	Name of the profile where the applications are deployed. By default, all applications deploy to the same profile. To change the profile name, see “WebSphere and WebLogic 9.1.x” on page 62
Domain (WebLogic)	Default name of the domain where you the applications are deployed. For WebLogic 9.1.x, all applications deploy to the same domain. To change the domain name, see “WebSphere and WebLogic 9.1.x” on page 62
Component	Products being deployed. Some products display as components.
Server Name	Enter the name of the server where you will access the product. Do not include spaces. This name is used as the product directory name in
Port	To change the default port, enter a unique port number that does not exceed 1025 to avoid conflicts with third-party port assignments. See “Ports” in the <i>Hyperion Installation Start Here</i> .

3 Click **Next**.

If you installed the Performance Management Architect Web Server component during installation, continue with step 4 to enter details about the Dimension server and Data Synchronizer server in order to enable communication with the Web server. The information from these two dialogs is loaded into a configuration file called `awbcluster.xml`.

- 4 Accept the defaults for the Dimension server details or make a change, if necessary (for example, if IIS is on a port other than 80 or the server is on a different machine.)

Table 10 Dimension Server fields

Field	Description
Server	Server name
Port	IIS Port number (defaults to 80)
SSL	Select if you are using Secure Sockets Layer (SSL)
Maximum connections	Maximum simultaneous connections to the server (defaults to 20.)
Maximum idle connections	Maximum number of idle connections in the pool. If the number of idle connections exceeds this limit, the connection is closed (defaults to 10.)
Maximum Wait Time	Connection timeout (in milliseconds) for idle connections. If a connection is idle longer than this time, the connection is closed (defaults to 60000.)

Note:

Hyperion recommends that you accept the default connection details.

- 5 Click **Next**.

- 6 Accept the defaults for the Data Synchronization server details or make a change if necessary.

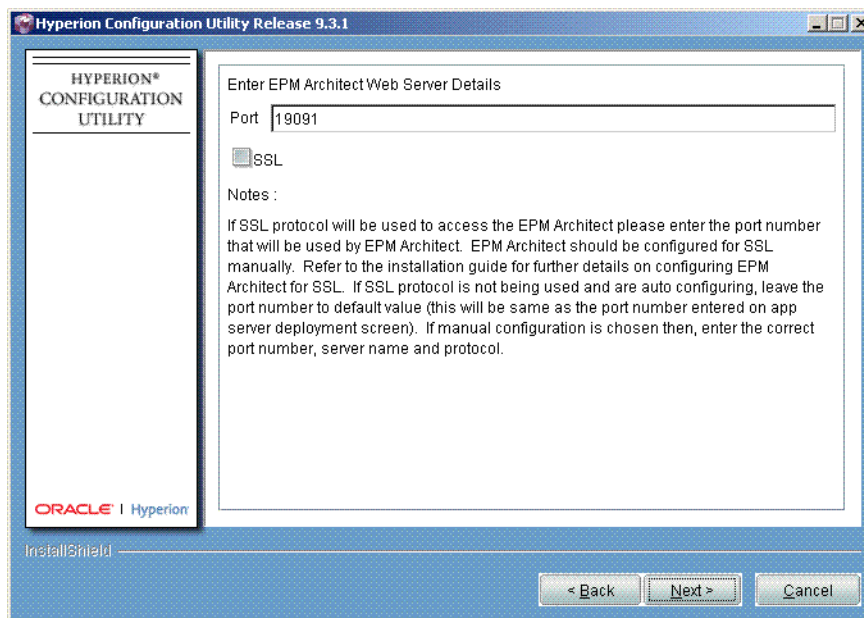
Table 11 Data Synchronization Server fields

Port	Data Synchronization port number (defaults to 19101.)
Maximum connections	Maximum simultaneous connections to the server (defaults to 20.)
Maximum idle connections	Maximum number of idle connections in the pool. If the number of idle connections exceeds this limit, the connection is closed (defaults to 10.)
Maximum Wait Time	Connection timeout (in milliseconds) for idle connections. If a connection is idle longer than this time, the connection is closed (defaults to 60000.)

Note:

Hyperion recommends that you accept the default connection details.

- 7 Click **Next**.



- 8 If you are using SSL (Secure Sockets Layer), change the port number to your SSL port number and select the **SSL** check box. This information is stored in Shared Services. Then click **Next**.
- 9 After application server deployment has completed, select **No** and click **Next** in response to the prompt to return to the product selection panel.
- 10 Click **Finish**.

What Happens During Deployment

WebSphere and WebLogic 9.1.x

Hyperion Configuration Utility deploys each application to the same WebSphere profile or WebLogic domain. The profile or domain is created when the first application is deployed. Each application runs in a separate JVM.

Hyperion Configuration Utility deploys the application to:

`HYPERION_HOME/deployments/<AppServNameAndVersion>`

Under this directory, the `bin` directory contains start and stop scripts for all deployed applications. For each application, there is also a `setCustomParams<Product>.bat` file or a shell script where `JAVA_OPTIONS` can be changed when starting using start scripts.

To change the default profile or domain directory, modify the deployment directory parameter in the `weblogic.properties` or `websphere.properties` in:

`HYPERION_HOME/common/config/resources/<AppServName>/resources`

Note:

It is not recommended to change other parameters in this file.

WebLogic 8.1.x

Deploying to a single domain for WebLogic 8.1.x is not supported. For WebLogic 8.1.x, Hyperion Configuration Utility deploys the application to:

`PRODUCT_HOME/AppServer/InstalledApps/<AppServName>/<Version>`

Increasing the Heap Size for Java Application Servers

For both Planning and Performance Management Architect, depending on the size of your environment, you may need to increase the heap size for your Java application server in order to get better performance or to upgrade large applications. While the default can be used in a test environment (single server type configuration), the heap size needs to be increased for use in a production environment (multiple servers). For Performance Management Architect, these are guidelines to use for increasing heap size:

Number of Members	Heap Size Setting
Less than 10000	-ms128 -mx256 (min 128 max 256)
Between 10,000 – 30,000	-ms256 -mx512
Over 30,000	-ms512 -mx1024

- To increase the heap size for Weblogic 9.1 or 8.1.6:
 - 1 **Open the startup script. For example:** `startEPMAWebTier.bat`).
 - 2 **Add this line to set the heap size (this is an example):** `set MEM_ARGS=-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for WebSphere 6:
 - 1 **For Planning, from the WebSphere Admin console, select **Servers > Application Servers**.**
 - 2 **Select the Performance Management Architect server name.**
 - 3 **Under Server Infrastructure, expand **Java and Process Management > Process Definition**.**
 - 4 **Increase the Max Heap Size. The default Max Heap Size is 512 MB.**

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for Tomcat 5.0.28:
 - 1 **For Performance Management Architect, open the startup script, for example:** `startEPMAWebTier.bat`.

- 2 Search for the following: `set JAVA_OPTS=-server`
- 3 Append the following to the end of that line (this is an example): `-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

Note:

If the Tomcat application server does not start after making this change, replace the word “start” with “run” in the `startup.bat` file.

Optional: Interface Datasource Configuration

To understand use of the Interface Datasource Configuration option in the Configuration Utility, see the *Hyperion Performance Management Architect Administrator's Guide*. This option is not required in order to install Performance Management Architect and can be done at a later time.

In This Chapter

Installing and Configuring Workspace.....	65
Completing Shared Services Tasks.....	65
Verify Performance Management Architect Installation	66
Verify the Planning Installation	69

Installing and Configuring Workspace

Before you can use Planning or Performance Management Architect, you must install and configure Workspace, which is part of the Reporting and Analysis installation. An important part of configuring Workspace is to enable the Web Server Plug-in.

Optionally, at the same time you install and configure Workspace, you can install and configure Financial Reporting and/or Web Analysis. See the *Hyperion Reporting and Analysis — System 9 Installation Guide*.

After you complete configuration of Workspace, you need to grant rights using the User Management Console.

Completing Shared Services Tasks

After configuration tasks for Planning and Performance Management Architect have been completed, you must grant other users rights to use Planning and complete additional tasks using the Shared Services User Management Console. The three tasks to complete are:

1. Create a project using the User Management Console. Planning can contain many projects and a project contains many applications. See the *Hyperion Security Administration Guide* for more information.
2. Assign roles for Shared Services user management. See the *Hyperion Security Administration Guide* for more information.
3. Assign global roles of Application Creator and Dimension Editor to use Performance Management Architect or Classic Application Administration. See the *Hyperion Security Administration Guide* for more information.

Verify Performance Management Architect Installation

Note:

If you are using Classic Application Administration instead of Performance Management Architect, skip this section.

► To verify that you can access Performance Management Architect:

- 1 Ensure that Shared Services and Workspace are running.
- 2 Ensure that IIS is running.
- 3 Start the Dimension server by doing one of the following:
 - From the Services panel, start Hyperion S9 EPM Architect Process Manager.

Note:

Starting Performance Management Architect Process Manager service automatically starts these services: Hyperion S9 EPM Performance Management Architect Engine Manager, Hyperion S9 EPM Performance Management Architect Event Manager, and Hyperion S9 EPM Performance Management Architect Job Manager.

- Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start Dimension Server**.

Note:

If you have difficulty starting the Dimension server, you might need to change the timeout setting. See [“Starting and Stopping Performance Management Architect Dimension Server”](#) on page 67.

- 4 Start the Performance Management Architect application server by doing one of the following:
 - From the Services panel, start Hyperion S9 EPM Architect Web ATS5 (for Tomcat); Hyperion S9 EPM Architect Web WLS<version> (for WebLogic); or Hyperion S9 EPM Architect Web WAS<version> (for WebSphere).
 - Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start Performance Management Architect Web**
- 5 Open your Web browser and access Performance Management Architect through Workspace (<http://<Web Server>:<port>/workspace/>) where <Web Server> is the Web server machine hostname and <port> is the Web server listen port; for example, 19000 if using the Apache instance configured with Reporting and Analysis.
- 6 Enter your user name and password and click Log On.

Note:

If you have difficulty accessing Performance Management Architect, see *Hyperion Installation and Configuration Troubleshooting Guide*.

- 7 Select **Navigate > Administer > Dimension Library**.
- 8 Follow the procedures in the *Hyperion Enterprise Performance Management Architect Administrator's Guide* to import dimensions and create an application view.

Starting and Stopping Performance Management Architect Dimension Server

You can start and stop the Performance Management Architect Dimension server from the Start menu or through the Services panel.

- To start or stop the Dimension server:

Do one of the following:

- Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start Dimension Server** or **Stop Dimension Server**.
- From the Services panel, start **Hyperion S9 EPM Architect Process Manager**.

- To increase the timeout setting for startup of Dimension Server:

If you experience a problem with starting up the service for the Dimension server (Hyperion S9 EPM Architect Process Manager), you can change the timeout setting. The default timeout setting for startup of the Dimension server is 180 seconds.

1. Open the `BPMA_Server_Config.xml` file. This file is located in `%HYPERION_HOME%\BPMA\AppServer\DimensionServer\ServerEngine\bin`.
2. Search for `DimensionServerStartupTimeout` under **Config > ProcessManager** and change the value of the timeout (in seconds).

Starting and Stopping Performance Management Architect Application Server

You can start and stop the Performance Management Architect application server using the Services panel, the Start menu, or a command. The location of the command depends on which Java application server you are using.

- To start or stop the EPM Architect application server:

Do one of the following:

- From the Services panel, start **Hyperion S9 EPM Architect Web <AppServerVersion>**.
- Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start (Stop) Performance Management Architect Web**.
- On the computer hosting your Java application server, locate the start or stop server command.

Table 12 Location Example for StartEPMAWebTier and StopEPMAWebTier Commands

If you are using:	Go to this directory (for example)	Execute This Command
<ul style="list-style-type: none"> ○ Tomcat 5 ○ WebLogic 9 ○ WebSphere 6 		Double-click startEPMAWebTier.bat or stopEPMAWebTier.bat
WebLogic 8.1.6	<drive letter>:\Hyperion\ BPMA \AppServer\InstalledApps \WebLogic\<version> \BPMAWebServer\bin	Double-click startEPMAWebTier.bat or stopEPMAWebTier.bat

Starting and Stopping Performance Management Architect Data Synchronizer Server

The Data Synchronizer server must be started to use data movement capabilities of Performance Management Architect. However, it is not needed in order to log into Workspace or verify the Performance Management Architect installation. See the *Hyperion Performance Management Architect Administrator's Guide* for more information about using the Data Synchronization features of Performance Management Architect.

You can start and stop the Performance Management Architect Data Synchronizer server using the Services panel, the Start menu, or a command. The location of the command depends on which Java application server you are using.

- To start or stop the Performance Management Architect Data Synchronizer server:

Do one of the following:

- From the Services panel, start Hyperion S9 EPM Architect Data Sync <AppServerVersion>.
- Select Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start (Stop) Data Synchronizer.
- On the computer hosting your Java application server, locate the start or stop server command.

Table 13 Location Example for StartEPMADataSynchronizer and StopEPMADataSynchronizer Commands

If you are using:	Go to this directory (for example)	Execute This Command
<ul style="list-style-type: none"> ○ Tomcat 5 ○ WebLogic 9 ○ WebSphere 6 		Double-click startEPMADataSynchronizer.bat or stopEPMADataSynchronizer.bat
WebLogic 8.1.6	<drive letter>:\Hyperion\ BPMA \AppServer\InstalledApps \WebLogic\<version> \BPMAWebServer\bin	Double-click startEPMADataSynchronizer.bat or stopEPMADataSynchronizer.bat

Verify the Planning Installation

Before you begin, ensure the Shared Services server, Workspace and Essbase servers are all running.

- To verify that you can log on to the Workspace to access Planning:
 - 1 Start the Planning application server. See [“Starting and Stopping Planning Application Server” on page 69](#).
 - 2 Open your Web browser.
 - 3 Access Planning through Workspace (<http://<Web Server>:<port>/workspace/>) where **<Web Server>** is the Web server machine hostname and **<port>** is the Web server listen port; for example, 19000 if using the Apache instance configured with Reporting and Analysis.
 - 4 Enter your user name and password and click Log On.
 - 5 Select **Navigate > Applications > Planning**.

Starting and Stopping Planning Application Server

You can start and stop the Planning application server using the Start menu or a command. The location of the command depends on which Java application server you are using.

- To start or stop the Java application server:
 - On the computer hosting your Java application server, locate the start or stop server command.

Table 14 Location Example for StartHyperionPlanning and StopHyperionPlanning Commands

If you are using:	Go to this directory (for example)	Execute This Command
<ul style="list-style-type: none">○ Tomcat 5○ WebLogic 9○ WebSphere 6	/vol1/Hyperion/deployments/ <AppServerVersion>/bin	Double-click startHyperionPlanning.sh or stopHyperionPlanning.sh
WebLogic 8.1.6	/vol1/ hyperion/Planning/ AppServer/ InstalledApps/ WebLogic/<version>/ HyperionPlanning	Double-click startHyperionPlanning.sh or stopHyperionPlanning.sh

7

Installing Smart View, Offline Planning, Planning Adapter, and Reporting and Analysis

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Installing Smart View

Smart View enables integration of Office products with Planning, Financial Management, and Financial Reporting information. Smart View is Windows based, and replaces the existing spreadsheet add-ins for Planning and Financial Management. Within Planning, end users can import Planning forms to Excel. Then, users can use Smart View to work with forms online, connected to the Planning server, or offline.

You can access the `SmartView.exe` through a URL: `http://HyperionPlanningView`. While logged in to Workspace select Tools > Install > SmartView.

► To install the Smart View client:

- 1 Double click the `SmartView.exe` file.
- 2 In the installation wizard, click **Next**.
- 3 Install Smart View to the default location, `<drive letter>:\Hyperion\SmartView`, or click **Change** to install to a different location.
- 4 Click **Next**.
- 5 Click **Install**.
- 6 Click **Finish**.

The next time you open Excel, Word, or PowerPoint, a Hyperion menu is added to the menu bar.

- 7 After Smart View is installed, end users must use Smart View Connection Manager to create a connection to Planning.

For information on how to use Smart View, see the *Hyperion Smart View for Office User Guide* or the online help that is installed with Smart View.

Note:

To preserve login and user preference information, uninstalling Smart View does not remove these registry items:

- HKEY_CURRENT_USER\Software\Hyperion Solutions\HyperionSmartViewConnections
- HKEY_CURRENT_USER\Software\Hyperion Solutions\HyperionSmartViewLogin
- HKEY_CURRENT_USER\Software\Hyperion Solutions\HyperionSmartViewPreferences

Installing Offline Planning

Planners can disconnect from the Planning server and work with data forms offline while using comparable online functionality. To work offline, planners retrieve data forms from Planning Web, load them into Smart View, and take the data forms offline. Then they can perform data entry and save their data back to the Planning server. For example, they can adjust data, view instructions, add supporting detail, and create formulas to manipulate data. Users can work offline with their plans and forecasts in any location where an Internet connection may not exist.

The Planning setup program places the Offline installer in: *<drive letter>:\Hyperion\Planning\Bin\SmartView* folder. *Offline.exe* provides Offline to your users on a network or on user's machines. Offline Planning must be installed on a Windows 32-bit machine where Excel is installed.

Caution!

If you used forms offline in a previous release, you must sync forms back to the server before installing Offline Planning Release 9.3.1.

► To install Offline Planning on a Windows machine:

- 1 Double click the *Offline.exe* file.
- 2 Review the **Welcome** screen and click **Next**.
- 3 From the list of countries, select the location from which you are installing, and click **Next**.
- 4 Read the license agreement, then select **I AGREE** and click **Next**.
- 5 Click **Next** to accept the default installation directory, or click **Browse** to select another directory, and click **Next**. The default directory is *<Hyperion_Home>:\Hyperion\Offline*.
- 6 Review the summary information and click **Next** to continue the installation, or **Back** to change settings.
- 7 Click **Finish**.

Since Offline Planning Provider terminates when a user without proper access takes a form offline, administrators must give users the following permissions:

- Read and write permissions for the following folders and subfolders: {C:\hyperion\offline\}myanalytics and C:\hyperion\offline\}offlinedata.
- Read and execute permissions for c:\windows\system32\msvcr71.dll.

Installing the DIM Adapter for Planning

After you install and configure Oracle's Hyperion® Data Integration Management, you can install and configure adapters that enable you to retrieve and write data for Planning and other Hyperion products such as Essbase, Financial Management, or Performance Scorecard.

A Hyperion product and the Data Integration Management adapter for that product can be on different computers. For example, you can install Planning on one computer and DIM Adapter for Planning on another.

Each adapter includes online help that provides instructions for using the adapter.

You must have administrative privileges on any computer where you install a Data Integration Management adapter. A Data Integration Management adapter installer provides two options:

- Typical—Install all adapter components
- Custom—Install the components that you select:
 - Client Plug-in—Enables you to configure source and target definitions for the Hyperion application in Designer.

Client Plug-in should be installed on the same computer as PowerCenter Client.

- Reader and Writer Plug-ins—Enable you to read information from the Hyperion application and write information to it.

Reader and Writer Plug-ins should be installed on the same computer as PowerCenter Server

The installer sets environment and system variables:

- Reader and Writer Plug-ins of DIM Adapter for Planning (Solaris, AIX):

CLASSPATH is updated with the *Installation Directory*/HPConnector/Bin/Resources directory and the *Installation Directory*/HPConnector/Bin/Lib/HPPlugin.jar file.

Note:

When you install the client and server components of any Data Integration Management adapter on one computer, you must install both components in the same location.

► To install a Data Integration Management adapter:

1 Take one action from the installation DVD or the directory where you downloaded the adapter installer:

- Windows—Click setupwin32.exe.
- UNIX—Run a program:

- AIX—`setupAix.bin`
 - Solaris—`setupSolaris.bin`
 - Linux—`setupLinux.bin`
 - HP-UX—`setupHP11.bin`
- 2 On the adapter installer **Welcome** screen, click **Next**.
 - 3 Select a country for the installation, and click **Next**.
 - 4 Select **I AGREE**, and click **Next**.
 - 5 Specify the directory in which to install the adapter, and click **Next**.
 - 6 Click **Next** to accept the Hyperion Home directory.
 - 7 Select a setup type, and click **Next**.
 - 8 If you selected the Custom setup option in the preceding step, select components to install, and click **Next**.
 - 9 Verify the installation summary, and click **Next**.

Tip:

You can click Back to change installation choices.

While the installer is running, a progress page is displayed. When the installation is complete, the Configuration Guidelines page is displayed.

Installing Adapters in Silent Mode

When you install a Data Integration Management adapter in silent mode, the installer retrieves the installation properties that are saved in a response file instead of displaying screens where you enter these properties. Silent mode is often used for performing installations remotely. You can create the response file from a template before you perform an installation, or you can create the file during an installation for use in subsequent silent-mode installations.

- To install an adapter in silent mode, run this command:

```
InstallerFile -silent -options ResponseFile
```

where *InstallerFile* is a platform-specific installation program (such as `setupwin32.exe` for an installation on a Windows platform or `setupSolaris.bin` for a Solaris platform) and *ResponseFile* is the property file containing the parameters required for the installation.

Installing Adapters in Console Mode

When you run the installer for an adapter in console mode, you select input from a series of menus that are displayed.

- To install an adapter in console mode, run this command:

```
InstallerFile -console
```

where *InstallerFile* is a platform-specific installation program (such as *setupSolaris.bin* for a Solaris platform).

Configuring Adapters

After installing Data Integration Management adapters, you must configure them on the computers hosting the PowerCenter Server, Client, and Repository Server components of Data Integration Management.

Adapter configuration tasks are described in these topics:

- “[Registering Adapters with a Repository](#)” on page 75
- “[Configuring Hyperion Application Connections](#)” on page 76
- “[Configuring JVM Options](#)” on page 78

You can perform these tasks on Windows computers where PowerCenter Client is installed.

Registering Adapters with a Repository

If you install the Reader and Writer Plug-ins component of a Data Integration Management adapter, which is a server component, you must register the adapter with the repository. This registration is not required if you install only the Client Plug-in component.

- To register a Data Integration Management adapter with a repository:

- 1 **Copy the *HyperionProduct.xml* file installed with the adapter to *Repository Server Installation Directory\bin\Plugin*.**

HyperionProduct.xml locations:

- Planning– *HPConnector\Bin*
- Oracle's Hyperion® Data Integration Management Adapter for Essbase®– *HASConnector\Bin*
- Oracle's Hyperion® Data Integration Management Adapter for Financial Management– *HFMConnector\resources*
- Oracle's Hyperion® Data Integration Management Adapter for Performance Scorecard– *HPSCConnector\Bin*

- 2 **Ensure that Data Integration Management Repository Server is running:**
 - a. From the Windows Control Panel, select **Administrative Tools**.
 - b. Select **Services**.
 - c. In the **Services** window, check the status of **Hyperion S9 data Integration Management Repository Server**.
 - d. Unless the status is “Started,” click **Start** (in the upper left of the window).

Note:

Keep the Services window open for the next step.

- 3 **Stop Data Integration Management Server, if it is running:**
 - a. In the Services window, check the status of Hyperion S9 Data Integration Management Server.
 - b. If the status is “Started,” click **Stop** (in the upper left of the window).
- 4 **Connect to the Repository Server host computer:**
 - a. Select **Start > Programs > Hyperion System 9 > Data Integration Management > Informatica PowerCenter 7.1.4 - Client > Repository Server Administration Console**.
 - b. In **Repository Server Administration Console**, right-click the name of the Repository Server host computer, and select **Connect**.
 - c. Enter your password for the host computer, and click **OK**.
- 5 **Under the Repository Server host computer name, click **Available packages**.**
- 6 **Right-click *HyperionProduct.xml*, and select **Register**, where *HyperionProduct* is HAS (DIM Adapter for Essbase), HFM (DIM Adapter for Financial Management), or HPS (DIM Adapter for Performance Scorecard).**
- 7 **Enter the repository administrator user name and password, and click **OK**.**

Note:

By default, both the user name and the password are *Administrator* if you are using Informatica native authentication. If you are using Shared Services authentication, the default user name and password are *admin* and *password*, respectively.

- 8 **When a message that the registration succeeded is displayed, click **OK**.**
- 9 **Repeat these steps for each adapter to be registered**

Note:

For more information, see “Registering and Unregistering Repository Plug-ins” in the Informatica PowerCenter *Repository Guide*.

Configuring Hyperion Application Connections

After you configure an adapter, you must configure an application connection in Workflow Manager before you can extract data from sources or write data into targets. When configuring application connections, you specify attributes that Data Integration Management Server uses to connect to a database during a Data Integration Management session. The application connections that you define in Workflow Manager are saved in Data Integration Management Repository.

- To configure application connections:
- 1 **Ensure that Data Integration Management Repository Server is running:**

- a. From the **Control Panel**, select **Administrative Tools**.
- b. Select **Servers**.
- c. In the **Services** window, check the status of **Hyperion S9 data Integration Management Repository Server**.
- d. Unless the status is “Started,” click **Start** (in the upper left of the window).

2 Start the repository:

- a. Select **Start > Programs > Hyperion System 9 > Data Integration Management > Informatica PowerCenter 7.1.4 - Client > Repository Server Administration Console**.
- b. In **Repository Server Administration Console**, right-click the name of the Repository Server host computer and select **Connect**.
- c. Enter your password for the host computer, and click **OK**.
- d. In the **Repositories** directory, double-click the repository name.
- e. Click **Start** (on the left).

3 Select **Start > Programs > Hyperion System 9 > Data Integration Management > Informatica PowerCenter 7.1.4 - Client > Workflow Manager.**

4 In **Workflow Manager, connect to the repository:**

- a. In the **Repository Navigator** panel, double-click the repository name.
- b. Enter the repository administrator's user name and password, and then click **Connect**.

5 Select **Connections > Application.**

6 Click **New.**

7 Select the connection for the adapter that you are configuring, and click **OK.**

8 Enter the requested information, and click **OK:**

The information requested depends on the Hyperion application. It can include these items:

- **Name**—A name for the connection
- **User Name**—Your user name for the Hyperion application; for example, if you are configuring Hyperion Planning Connection, your user name for Planning.
- **Password**—Your password for the repository; for example, if you are configuring Hyperion Planning Connection, your password for Planning.
- **URL**—The Hyperion product application URL that you want to use
- **Host or ServerHost**—The name of the Hyperion product server host computer; for example, if you are configuring Hyperion Planning Connection, the name of the Planning server host computer
- **Port**—The port number used by the application
See *Installation Start Here* for information about ports.
- **Cluster** —The name of the registered cluster where the application runs

Application Connection Browser lists the new application connection.

Tip:

You can edit or delete an application connection by selecting it in the list in Application Connection Browser and clicking Edit or Delete.

Configuring JVM Options

► To configure JVM options:

1 Start Informatica Server Setup:

- Windows—Select **Start > Programs > Hyperion > Data Integration Management > Informatica PowerCenter 7.1.4 - Server > Informatica Server Setup**.
- UNIX—Run `pmconfig` from the `$DIM_HOME/Server/bin` directory.

Note:

On Solaris, run `./pmconfig` to avoid running the Solaris system command by the same name. The `PM_HOME` environment variable must point to the PowerCenter Server installation directory, or the PowerCenter Server cannot start.

2 With **Configure Informatica Service selected, click **Continue**.**

3 Select the **JVM Options tab.**

4 In **VM Location, enter the fully qualified path to the `jvm.dll` file in your `JAVA_HOME` directory and then click **OK**.**

Uninstalling Adapters

► To uninstall a Data Integration Management adapter:

1 Select **Add/Remove Programs from the Windows Control Panel.**

2 Select the adapter.

3 Click **Change/Remove.**

4 Optional: Remove the adapter plug-in from a repository: .

- a. Open the PowerCenter Repository Server Administration Console.
- b. Select the repository in which the plug-in is registered.
- c. Stop the repository, if it is already running.
- d. Click **Repository > Registered packages** and select the XML file for the adapter:
 - Oracle's Hyperion® Data Integration Management Adapter for Hyperion Enterprise®—HE.xml
 - DIM Adapter for Essbase—HAS.xml
 - DIM Adapter for Financial Management—HFM.xml
 - DIM Adapter for Planning—Planning.xml

- Oracle's Hyperion® Data Integration Management Adapter for Translation Manager —HTM.xml
- e. Click **Unregister** to remove the plug-in from a repository.
- f. In **Remove Repository plug-in**, enter the repository user name and password, and click **OK**.

The Output window displays the status of the plug-in uninstallation.

Note:

Repeat step 4 to remove the plug-in from additional repositories.

Uninstalling Adapters in Silent Mode

When you uninstall a Data Integration Management adapter in silent mode, the installer retrieves the uninstallation options that are saved in a response file instead of displaying screens where you enter these properties. Silent mode is often used for performing uninstallations remotely. You can create the response file from a template before you perform an uninstallation, or you can create the file during an uninstallation for use in subsequent silent-mode uninstallations.

- To uninstall an adapter in silent mode, run this command:

```
UninstallerFile -silent -options ResponseFile
```

The uninstaller file is in the `Uninstall` subdirectory of the adapter installation directory.

Uninstalling Adapters in Console Mode

When you run the uninstaller for an adapter in console mode, you select input from a series of menus that are displayed.

- To uninstall an adapter in console mode, run this command:

```
UninstallerFile -console
```

The uninstaller file is in the `Uninstall` subdirectory of the adapter installation directory.

Installing Reporting and Analysis

Install Financial Reporting and/or Web Analysis if you did not install these products when you installed and configured Workspace. See the *Hyperion Reporting and Analysis — System 9 Installation Guide*.

Installing and Configuring the Planning Details Analytic Data Model (ADM) Driver

The Planning Details ADM driver enables you to produce production quality reports using Financial Reporting that include Planning supporting detail line items and planning unit annotations. After you install the Planning Details ADM driver according to these instructions, you may choose Planning Details as a data source within Financial Reporting. The Planning Details ADM driver has been optimized as a data source to provide Planning features such as supporting details, planning unit annotations, and metadata filtering. If your report grid will not use these Planning features, for optimal performance, choose Essbase as the data source for your report.

- To install the Planning Details ADM driver:
 - 1 Using the Planning set up program, install the ADM Driver on the Financial Reporting server and the Financial Reporting Web server machines. If you choose a Typical install, all Planning components and the ADM driver are installed. In a Custom install, you can just select the ADM Driver option.
 - 2 Install Financial Reporting. You do not need to install the ADM Driver on the Financial Reporting WIN32 client.

The Planning uninstaller removes both Planning and Performance Management Architect. However, you must first deregister both Planning and Performance Management Architect from Shared Services.

Since Planning 9.3.1 introduces a new file structure, when you uninstall a prior release and then install Planning 9.3.1, there may be some folders left from the previous release. For a list of the current 9.3.1 file folders, see [“Files Installed in the Planning Directory” on page 28](#).

If you are uninstalling an older release than 9.3.x, you should backup your old HspJSHome.properties file before uninstalling.

Caution!

Uninstalling does not remove Services from a prior release. You can disable Services using the Services panel.

► To uninstall Planning 9.3.1:

1 Deregister Planning from Shared Services:

- a. Launch the Hyperion Configuration Utility.
- b. Select Planning (as the product to deregister from Shared Services) and click **Next**.
- c. On the configuration tasks selection screen, select **Deregister from Shared Services** 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.

- d. Enter the password for the specified Shared Services user.
- e. Click **Next**.
- f. Select **No** in response to the prompt to go back to the product selection panel.
- g. On the Configuration status screen, click **Finish**.
- h. Repeat these steps to deregister Performance Management Architect from Shared Services.

2 Perform an action to run the uninstaller program:

- Run the uninstaller executable (uninstallPlanning.bin) located for example in /vol1/hyperion/Planning/uninstall.

3 Review the **Welcome screen, then click **Next**.**

- 4 Accept the default of uninstalling all components of Planning by clicking **Next**.
- 5 Verify the components to uninstall and click **Yes**.

Note:

If you have both Planning and Financial Management installed, Performance Management Architect can be uninstalled only by the product that installed it originally.

- 6 Click **Finish**.

Note:

The uninstaller may not remove all common components in the <Hyperion_Home>/Common directory because other Hyperion products may be using these same components. In addition, check if the HyperionRMIRegistry file exists in /etc/rc2.d. If the file still exists in the old location, stop the process if necessary, then delete the old file. For the current release, the HyperionRMIRegistry file is stored in \$HYPERION_HOME/common/RMI.

9

Upgrading to Planning 9.3.1

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This chapter contains procedures for upgrading from a previous release of Planning to Planning 9.3.1.

You may upgrade directly from any release 3.5 and above to 9.3.1.

Note:

Before you upgrade, Hyperion recommends that you discuss any upgrading concerns with Hyperion Consulting Services.

Changes in This Release

These are highlights of the changes made to installation and configuration in the 9.3.x release:

- Removal of separate Planning Desktop – All administrative functionality in Planning is now accessible through the Planning Web and there is no Planning Desktop. Creation of applications functionality is now moved to Performance Management Architect or Classic Application Administration.

- Application Administration – You can work with applications in this release using Performance Management Architect or Classic Application Administration. Different menus and options are available for each type of application. For a summary of features available for Performance Management Architect and Classic application administration, see *Hyperion Planning — System 9 Using Administration Features*. If you choose Performance Management Architect, you select the Performance Management Architect component during Planning installation and configure Performance Management Architect using the Configuration Utility. Performance Management Architect must be configured on a Windows 32-bit machine and requires a Web Server (IIS), a Java application server (Tomcat, WebLogic, or WebSphere), and a relational database (SQL, Oracle, or DB2). Classic Application Administration is installed as part of the Planning installation and no separate configuration is required.
- Workspace – Planning is now available within the Workspace. This means you must install and configure Workspace. You can install and configure Financial Reporting and Web Analysis at the same time.
- Offline Planning– Available through a separate installer (*Offline.exe*). Used with Smart View to allow planners to disconnect from the Planning server and work with data forms offline while using comparable online functionality. To work offline, planners retrieve data forms from Planning Web, load them into Smart View , and take the data forms offline
- Removal of DCOM and HspJSHome.properties File – With removal of the Planning Desktop, you do not have to configure DCOM or perform any configuration tasks outside of the Hyperion Configuration Utility. The HspJSHome.properties file is now replaced by the PlanningSystemDB.properties file generated through the Configure Database task in the Hyperion Configuration Utility. The PlanningSystemDB.properties file references the system table where the properties are maintained.
- The file folder structure of Planning changed in the 9.3.1 release. See [“Directories and Files Installed” on page 28](#).
- New documentation to assist during installation and configuration. You can reference the new *Hyperion Installation and Configuration Troubleshooting Guide* for tips and procedures to help you troubleshoot. There is also a new *Hyperion Backup and Recovery Guide*.

Upgrading Planning Checklist

This checklist contains the detailed steps required for a successful upgrade of Planning.

Review system requirements for this release.	<i>Hyperion Installation Start Here</i>
Review list of changes to installation and configuration in Planning Release 9.3.1.	“Changes in This Release” on page 83 in <i>Hyperion Planning — System 9 Installation Guide</i>
Install or upgrade Shared Services: 1. Back up your Shared Services relational database and Open LDAP repository. 2. Install Shared Services and configure the Shared Services App Server and RDBMS.	<i>Hyperion Shared Services Installation Guide</i>

Configure the Shared Services external authentication provider.	<i>Hyperion Shared Services Installation Guide</i>
If you are upgrading from a release prior to 9.3.x, back up your existing Planning properties file (HspJSHome.properties) file. Also back up HBRServer.properties if upgrading from Planning Release 4.1.1 or later.	“Backing Up the Planning and Business Rules Properties Files” on page 86 and <i>Hyperion Backup and Recovery Guide</i> .
Back up applications and application databases (including Essbase, the relational database, and the required components of Planning: If you are upgrading Performance Management Architect from release 9.3.0.1, back up the Performance Management Architect database.	<i>Hyperion Backup and Recovery Guide</i>
If you are installing Performance Management Architect, create a database. If you are using DB2 for Planning or Performance Management Architect, set an appropriate tablespace.	“Upgrading the Database-Tier ” on page 87
Upgrade version of Essbase and Administration Services.	“Upgrading Essbase and Administration Services” on page 90
Upgrade your Java application server to a supported version.	“Upgrading the Java Application Server ” on page 92
Uninstall the prior release of Planning.	“Uninstalling a Prior Release of Planning ” on page 92
Install Microsoft Internet Information Services (IIS)	“Verifying the IIS Installation” on page 31
Install Planning (optionally, including Performance Management Architect)	“Installing Planning ” on page 94
Configure Planning and optionally, Performance Management Architect using the Configuration Utility. Note: The Shared Services server, and Essbase Server must be running when you perform this step.	“Configuring Planning” on page 102
Review and edit product options to ensure you comply with your license agreement and activate features you are licensed to use.	See “Review and Edit Product Options” on page 114
Complete post configuration tasks: 1. Install and configure Workspace. Optionally, install and configure Financial Reporting and/or Web Analysis at the same time. 2. Optionally, if you are upgrading from 4.0.x to the current release, clean up Planning users in the Essbase database by using the UserMigUtil. 3. Complete Shared Services tasks in the User Management Console: <ul style="list-style-type: none"> ● Create a project in Shared Services ● Assign roles for Shared Services user management. ● Assign global roles of Application Creator and Dimension Editor to use Performance Management Architect or Classic Application Administration. ● Migrate Planning users and groups to Shared Services. 4. Verify the Planning and optionally, the Performance Management Architect installation. 5. Upgrade applications to Release 9.3.1.:	<ol style="list-style-type: none"> 1. For Workspace installation and configuration, see the <i>Hyperion Reporting and Analysis — System 9 Installation Guide</i> 2. For instructions on the UserMigUtil, see “Clean Up Users in Essbase Database (Optional)” on page 126. 3. To complete Shared Services tasks, see “Completing Shared Services Tasks” on page 65 and the <i>Hyperion Security Administration Guide</i>. 4. To verify the installation, see “Verify the Planning Installation” on page 69 5. To upgrade applications, see “Upgrading Existing Applications ” on page 131.

<ul style="list-style-type: none"> a. If upgrading from a release prior to 9.3.1, copy the <code>HspJSHome.properties</code> file to the folder containing <code>PlanningSystemDB.properties</code> file. b. Run PropFileMig utility to transfer the information from the <code>HspJsHome.properties</code> file that contains information about your existing applications to the new Planning System Database you configured. c. In the Configuration Utility, under Planning, perform the edit datasource task for each application you want to upgrade. d. Restart the Planning application server. Then log on to the Planning URL and press Migrate to migrate each application to 9.3.1. e. Register applications with Shared Services. <p>Note: If you are upgrading from a pre-System 9 release, when prompted, migrate existing users and groups.</p> <ul style="list-style-type: none"> f. If you are using Performance Management Architect, log on to Performance Management Architect and use Application Upgrade wizard. <p>Caution! Once you upgrade the application in the Application Upgrade wizard, you can not use the Classic Dimension Editor.</p>	
<p>Optionally, install additional products:</p> <ul style="list-style-type: none"> ● Smart View ● Offline Planning ● DIM Adapter for Planning ● Financial Reporting and/or Web Analysis (if not completed during Workspace installation) 	<p>“Installing Smart View, Offline Planning, Planning Adapter, and Reporting and Analysis” on page 133</p>

Upgrading Shared Services

- To upgrade Shared Services:
 - 1 Back up the Shared Services relational database and OpenLDAP repository. See the *Hyperion Shared Services Installation Guide* for detailed information on backing up and upgrading.
 - 2 Install Shared Services and configure the Shared Services Application Server and RDBMS.
 - 3 Configure the Shared Services external authentication provider:

Backing Up the Planning and Business Rules Properties Files

Before installing Planning 9.3.1, you must back up a copy of your Planning properties file from your old release. The name of the file is `HspJSHome.properties`.

If you are upgrading from Release 9.2.0.3, the `HspJSHome.properties` file can be found in `<HYPERION_HOME>/AppServer/InstalledApps/`

If you are upgrading from Release 9.2.0.3 or 9.3.x, you also must back up a copy of the `HBRServer.properties` file located in `/vol1/Hyperion/AdminServices`.

Caution!

This is a critical step in the upgrading process since you will not be able to upgrade without a copy of the properties file from the prior release.

Backing Up Applications and Application Databases

Before upgrading to Planning 9.3.1, ensure that you have performed all the necessary backups. See the *Hyperion Backup and Recovery Guide* for complete procedures on backup.

Upgrading the Database-Tier

If you are using Performance Management Architect, you must create a database in SQL Server, Oracle, or DB2. There are some additional requirements if you are using DB2.

Setting an Appropriate Tablespace for Planning (DB2 only)

If you are using DB2 as your relational database, before you upgrade to Planning 9.3.1, you must configure the database with a large enough tablespace (having a page size of at least 8K) in order to support the Planning tables.

Note:

If you use DB2 and plan to upgrade to Planning from a previous release, you must follow these instructions before you upgrade. You cannot create an application until you follow the instructions in this section.

The following sample SQL script creates the necessary buffer pool and tablespace. Change the names and disk location to reflect your needs. By default, the tablespace is named `HSPSPACE8_1` and is created in the `C:\DB2DATA\HSPSPACE8_1` directory. The other settings are also defaults; the administrator should adjust them as appropriate for their environment.

Example

```
CREATE BUFFERPOOL hspool8_1 SIZE 250 PAGESIZE 8 K;  
CREATE REGULAR TABLESPACE hspace8_1 PAGESIZE 8 K  
    MANAGED BY SYSTEM USING ('c:\db2data\hspace8_1')  
    EXTENTSIZE 32 OVERHEAD 24.1 PREFETCHSIZE 8  
    TRANSFERRATE 0.9 BUFFERPOOL HSPPOOL8_1;
```

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

Setting Up Performance Management Architect Using DB2

To set up Performance Management Architect using DB2, you need to create:

- An Performance Management Architect database in a local directory
- A bufferpool to hold the system temporary tablespace that temporarily stores data during sort and collate operations
- A system temporary tablespace

When you create the DB2 database in a local directory, be sure to use the codeset UTF-8.

Setting Up a Bufferpool and System Temporary Tablespace for Performance Management Architect

The system temporary tablespace and its corresponding bufferpool (bpmapi001) are required by Performance Management Architect. The following SQL script creates the necessary buffer pool and tablespace.

Example

```
CREATE BUFFERPOOL bpmapi001 IMMEDIATE SIZE 250 PAGESIZE 32 K;  
CREATE SYSTEM TEMPORARY TABLESPACE bpmapi001 PAGESIZE 32 K  
    MANAGED BY SYSTEM USING ('c:\db2\Database\bpmapi001')  
    EXTENTSIZE 16 OVERHEAD 12.67 PREFETCHSIZE 16  
    TRANSFERRATE 0.18 BUFFERPOOL bpmapi001;
```

If you are using a DB2 database for Performance Management Architect, a tablespace is created during database configuration in the Hyperion Configuration Utility. The database administrator must ensure that the user who logs on to the Performance Management Architect relational database has CREATE access to the bufferpool and tablespace and CREATE VIEW privileges.

Installing DB2 v9 Runtime Client and DB2 .NET Data Provider

To use a DB2 database with Performance Management Architect, follow these requirements:

- Install DB2 v9 Runtime Client and DB2 .NET Data Provider on the Dimension Server machine. (DB2.NET Data Provider is installed as part of the DB2 v9 Runtime Client installation.)
- Ensure that your DB2 database is installed on a different computer, and not the Performance Management Architect Dimension Server machine where the DB2 9 Runtime Client will be installed.

DB2 9 Runtime Client Setup

You must install DB2 9 Runtime Client to ensure that Performance Management Architect services communicate with a DB2 database.

- If the Performance Management Architect computer has DB2 9 Runtime Client installed, verify that an entry exists in the Global Assembly Cache. See “[Verifying DB2 9 Runtime Client for Existing Installations](#)” on page 24.
- If the Performance Management Architect computer does not have the DB2 9 Runtime Client installed, you must install it. See “[Installing DB2 9 Runtime Client](#)” on page 24.

Verifying DB2 9 Runtime Client for Existing Installations

► To verify the Global Assembly Cache entry:

- 1 Click **Start > Run**.
- 2 Enter `c:\windows\assembly` and click **OK**.
- 3 Scroll down the resulting list and locate `IBM.Data.DB2 9.0.0.2`.
- 4 Right-click `IBM.Data.DB2 9.0.0.2` and select **Properties**.
- 5 Click **Version**—at the top it should display **File Version: 9.1.0.2** or greater.

Tip:

You can also verify that the version 9 Runtime Client is installed, if the following path and file exist: `C:\PROGRAM FILES\IBM\SQLLIB\BIN\NETF20\IBM.DATA.DB2.DLL` or `C:\PROGRAM FILES\IBM\SQLLIB_01\BIN\NETF20\IBM.DATA.DB2.DLL`.

To install the Runtime Client, see “[Installing DB2 9 Runtime Client](#)” on page 24.

If you see this version or newer, the setup is complete, and nothing needs to be installed.

Installing DB2 9 Runtime Client

► To install DB2 9 Runtime Client:

- 1 Download DB2 9 Runtime Client using the following URL. (You must be a registered IBM user.)
http://www-306.ibm.com/software/data/db2/v9/index_download.html
- 2 In Next Steps, near the bottom of the page, click **DB2 Client**.
- 3 Click **Sign in** and enter your IBM ID and Password.
- 4 Select the driver based on your operating system and language preference, then click **Continue**.
- 5 Select choices for the radio button questions, and click **I Agree**.
- 6 Click **I Confirm** and select a download option:
 - Download Using HTTP
 - Download Director

The file size for `db2_v9_en_US_setup.exe` is 23 MB.

- 7 Click **Download Now** and save to a location on the computer where Performance Management Architect services are installed.

- 8 Double-click `db2_v9_en_US_setup.exe` to execute.

Note:

When you install the DB2 9 Runtime Client, it automatically detects an existing client and enables you to upgrade the existing version or add a new version copy to preserve the existing version. You should select the second option to ensure that existing applications or software that use the older Runtime Client are not affected.

- 9 Accept the defaults and complete the installation.

Configuring DB2.Net Data Provider

After you complete the Runtime Client installation you must configure DB2.Net Data Provider.

- To configure DB2.Net Data Provider:

- 1 Select **Start > Programs > IBM DB2 > Configure DB2 .NET Data Provider**.

This entry is added to the Global Assembly Cache automatically: `c:\windows\assembly`. The entry is listed as `IBM.Data.DB2`.

A version is listed next to the name. However, you should verify the File Version, not the version listed next to the name.

- 2 To verify the file version, right-click the item and select **Properties**. Click **Version** and verify the File Version number listed at the top of the tab.

The file version should be 9.1.0.2 or greater.

Upgrading Essbase and Administration Services

To use Planning, you must also install the following components of Essbase:

- Essbase Server
- Administration Services

You must install Administration Services server and console. Business Rules is an installed component of Administration Services. If you want to use Business Rules with Planning, you must install Administration Services version 9.3.x. You can install and configure Administration Services on the middle tier, rather than the database tier.

If you are currently using an unsupported release of Essbase Server or Administration Services, you must upgrade to a supported release.

The software is provided through Oracle E-Delivery.

For more information about installation and configuration of Essbase and Administration Services, see the *Hyperion Essbase Installation Guide* and *Hyperion Administration Services Installation Guide*.

Note:

If you are using Planning on 64-bit Itanium, you must use 64-bit Essbase.

Upgrading the Middle-Tier

To upgrade to Planning 9.3.1, ensure that your Java application server meets the system requirements for this release. Also ensure that you meet these system requirements for Performance Management Architect if you are using Performance Management Architect for application administration:

- Microsoft Internet Information Services (IIS)
- .NET Framework 2.0 is registered and enabled if already installed on a Windows 2003 machine.

Note:

If .NET Framework is not already installed, the Planning setup program automatically installs this.

Installing Microsoft Internet Information Services (IIS) for Performance Management Architect (Windows Only)

To use Performance Management Architect, you must have IIS 6.0 or 5.0 installed on the Dimension server. The IIS version depends on whether you are using Windows 2000 server or Windows 2003:

- IIS 5.0 for Windows 2000 Server
- IIS 6.0 for Windows 2003 Server

Verifying the IIS Installation

► To verify the IIS installation:

- 1 Select **Start > Programs > Administrative Tools > Component Services**, and double-click **Services**, or, from Windows 2003, select **Start > Settings > Control Panel > Administrative Tools > Services**.
- 2 Check that the IIS services are running:
 - a. Select **IIS Admin Service**, and, if it is not started, click **Start**.
 - b. Select **World Wide Web Publishing Service**, and, if it is not started, click **Start**.
 - c. If you did not see the services for IIS, make sure that IIS is installed.
 - i. In Control Panel, select **Add/Remove Programs**.
 - ii. Under **Windows Components**, select **Application Server** and look for **Internet Information Services (IIS)**.

- iii. Install IIS if it is not already installed.

Upgrading the Java Application Server

Check the system requirements in the *Hyperion Installation Start Here* to make sure the Java application server you are using is still supported. You can choose to upgrade or install a different Java application server.

- To uninstall your current Java application server:
 - 1 Write down your existing license key.
 - 2 Stop services for the Java application server.
 - 3 Uninstall your current Java application server.
 - 4 Reboot your computer.
 - 5 Follow the installation instructions for the Java application server that you want to install. See [“Installing the Planning Middle Tier” on page 27](#) for more information on installing a Java application server.

Caution!

If you are using WebSphere 6.0.x, you must back up the `jdom.jar` file (or `jdom-b9.jar`) installed by WebSphere (located at `/opt/WebSphere/AppServer/java/lib/jdom-b9.jar`) and replace it with the `jdom.jar` that Planning installed in the `/Hyperion/Planning/lib` directory. Until you do so, you cannot deploy a Planning Application View in Performance Management Architect or a Planning application in Classic application administration.

Note:

You must use a 32-bit version of an application server running on AIX or Solaris.

Uninstalling a Prior Release of Planning

The Planning uninstaller removes both Planning and Performance Management Architect. However, you must first deregister both Planning and Performance Management Architect from Shared Services.

Since Planning 9.3.1 introduces a new file structure, when you uninstall a prior release and then install Planning 9.3.1, there may be some folders left from the previous release. For a list of the current 9.3.1 file folders, see [“Files Installed in the Planning Directory” on page 28](#).

If you are uninstalling an older release than 9.3.x, you should backup your old `HspJSHome.properties` file before uninstalling.

Caution!

Uninstalling does not remove Services from a prior release. You can disable Services using the Services panel.

- To uninstall an earlier release of Planning:

1 Deregister Planning from Shared Services:

- a. Launch the Hyperion Configuration Utility.
- b. Select Planning (as the product to deregister with Shared Services) and click **Next**.
- c. On the configuration tasks selection screen, select **Deregister from Shared Services** 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.

- d. Enter the password for the specified Shared Services user.
- e. Click **Next**.
- f. Select **No** in response to the prompt to go back to the product selection panel.
- g. On the Configuration status screen, click **Finish**.
- h. Repeat these steps to deregister Performance Management Architect from Shared Services.

2 Stop all activities and processes tied to Planning (Web server, application server, database, and any server related to Planning).

3 If you are using WebSphere 6.0.2.11 or 5.1.1.7:

- a. Switch to the user that installed Planning. For example, if Planning was installed as root, switch to root.
- b. Stop the HyperionPlanning server by running:

```
$WebSphere_HOME/bin/stopHPServer.sh
```
- c. Undeploy the HyperionPlanning server and application by running:

```
$WebSphere_HOME/bin/undeploy.sh
```

4 Perform an action to run the uninstaller program:

- Run the uninstaller executable (uninstallPlanning.bin) located for example in /
vol1/hyperion/Planning/uninstall.

5 Review the **Welcome screen, then click **Next**.**

6 Accept the default of uninstalling all components of Planning by clicking **Next.**

7 Verify the components to uninstall and click **Yes.**

Note:

If you have both Planning and Financial Management installed, Performance Management Architect can be uninstalled only by the product that installed it originally.

8 Click **Finish**.

Note:

The uninstaller may not remove all common components in the `<Hyperion_Home>/Common` directory because other Hyperion products may be using these same components. In addition, check if the `HyperionRMIRRegistry` file exists in `/etc/rc2.d`. If the file still exists in the old location, stop the process if necessary, then delete the old file. For the current release, the `HyperionRMIRRegistry` file is stored in `$HYPERION_HOME/common/RMI`.

Installing Planning

What Happens During Installation

The Planning setup program installs the files needed to run Planning, Performance Management Architect, and the common components used by multiple Hyperion products. Performance Management Architect is a component of the Planning installation. If you choose to use Classic Application Administration instead of Performance Management Architect, Classic Application Administration is automatically installed with Planning.

Note:

Ensure that Shared Services server, and Essbase are installed and configured before you install Planning.

By default, the Planning setup program performs these operations:

- Creates directories for a new installation
- Copies Planning software files to the Planning installation directory that you specify
- Copies common components to the `HYPERION_HOME` directory that you specify
- Installs the appropriate versions of Java Run-time Environment (JRE)
- Copies file to create a common RMI registry, called `HyperionRMIRRegistry`, for products such as Planning, Business Rules, and Oracle's Hyperion® Translation Manager. (The RMI registry starts a service that enables Oracle's Hyperion® Application Link adapters to connect to their respective servers.)
- If Performance Management Architect is selected for installation on a 32-bit Windows machine, copies Performance Management Architect software files to the Performance Management Architect installation directory, creates an Performance Management Architect virtual directory in IIS, installs .NET Framework 2.0 if not installed, and installs C++ Runtime libraries.

Directories and Files Installed

The setup program installs Planning software files in one directory and internal components and third party products in another directory.

Files Installed in the Planning Directory

Planning software components are installed in the Planning directory that you specify during setup.

The default location is `<user_home>/Hyperion/Planning`.

This table describes the files that are installed in this directory.

Directory	Contents
lib	Jar files needed to run Planning
AppServer	Files required for Java application server deployment for Planning
bin	Executables, bat files, sh files and cmd files including Planning utilities. Also included here are Smartview.exe and Offline.exe.
config	Planning properties and ico files
uninstall	Executable to uninstall Planning Note: You can also uninstall using the Windows Control Panel (Add/Remove Programs).

Files Installed in the BPMA Directory

Performance Management Architect must be installed on a Windows 32-bit machine. Performance Management Architect software components are installed in the Performance Management Architect directory you specify during setup.

The default location is `<drive letter>:\Hyperion\BPMA`.

This table describes the files that are installed in this directory.

Directory	Contents
AppServer	Files required for Java application server deployment for Dimension server and Data Synchronization server
Common	Shared libraries for Performance Management Architect
Server	SQL files required for relational database configuration
docs	Performance Management Architect Administrator's Guide

Files Installed in the HYPERION_HOME Directory

The Planning setup program places internal and third party components used by multiple Hyperion products in a central location, called *Hyperion Home*. The Hyperion Home value is stored in `.hyperion.<hostname>` in the home directory..

Note:

To ensure that all installers have the permissions required to modify the `HYPERION_HOME` location, Hyperion recommends that all Hyperion applications be installed under one HYPERION user account.

The default location for Hyperion Home is `$HOME/Hyperion`. When you install, the installer searches for the `HYPERION_HOME` environment variable on the computer to which you are installing.

If the Hyperion Home location was previously defined for another Hyperion product, the installation uses the previously defined location. The location cannot be changed through the installer.

If the current installation is the first Hyperion installation on the computer, you can specify the location during installation.

Note:

If the `HYPERION_HOME` directory is mounted on an NFS so that one `HYPERION_HOME` location is visible across multiple computers, Shared Services can be installed to only one computer. If you try to install Shared Services to an additional computer, the previous installation is detected.

Various files are installed in the `HYPERION_HOME/common` directory by a default installation of Shared Services. Some common components, and thus some files and folders, are optional and may not be installed.

Table 15 Common-Component Folders Created in the Common Directory

Folder	Contents
ADM	Files required for Planning Details Analytic Driver Model driver.
appServers	Application server files
CLS	License services APIs
config	Hyperion Configuration Utility files
CSS	Files to support Hyperion external authentication
Docs	Product documentation files
EssbaseJavaAPI	Java driver used when embedding Essbase in other applications

Folder	Contents
EssbaseRTC	Essbase runtime client used when embedding Essbase in other applications
httpServers	Apache web server files for batteries included installation
HyperionLookAndFeel	Installer user interface files
JakartaCommons	Common development library files
JavaMail	Files to support sending e-mail via Java
JCE	JCE files for encryption, key generation and agreement, and MAC
JDBC	JDBC files
JRE	Java Runtime Environment files
lib	common internal library files
loggers	Files for external authentication logging
ODBC	ODBC drivers
Opatch	Oracle patching tool files; for future use
PERL	Scripting language files
SAP	SAP files
SharedServices	Supporting files for Shared Services
utilities	Utilities to change the location of Hyperion Home and export, import, or validate provisioning data
validation	Not used in this release
velocity	Not used in this release
XML	Common XML components

Files Installed in the deployments Directory

The `deployments` directory is a central location for storing the required Java application server specific files for each product. The default location is `/vol1/Hyperion`.

Files Installed in the Logs Directory

The log files belonging to most Hyperion products are created in `<HYPERION_HOME>/logs`. Log files are created in a product-specific folder. For example, Shared Services logs are created in `<HYPERION_HOME>/logs/SharedServices9`. Similarly, Configuration utility log files are created in `<HYPERION_HOME>/logs/config`.

Installation logs for each product are located in `<HYPERION_HOME>/logs/install/<product>`. Application server log locations for Planning are dependent on which application server you are using. See the *Hyperion Installation and Configuration Troubleshooting Guide* for details.

Installing Planning

Planning can be installed on a Windows 32 bit, 64 bit, or UNIX machine. If you are using Performance Management Architect to create and manage applications, it can only be installed on a Windows 32 bit machine.

Note:

To ensure that all installers have the permissions required to modify the `HYPERION_HOME` location, Hyperion recommends that all Hyperion applications be installed under one HYPERION user account.

► To install Planning:

- 1 If you are upgrading from a previous Planning release, back up your Planning properties file (`HspJSHome.properties`) before installing Planning 9.3.1. This file is located under your application server folder and is needed during the upgrade procedures. See [Chapter 9, “Upgrading to Planning 9.3.1.”](#)
- 2 If you downloaded Planning software from Oracle E-Delivery, navigate to the directory where you downloaded the installation program, and run `setup.bin`.
- 3 Review the **Welcome** screen, then click **Next**.
- 4 From the drop-down list, select the country in which you are installing Planning. Then click **Next**.
- 5 Read the license agreement, then select **I AGREE** to accept the terms. Click **Next**.
- 6 Click **Next** to accept the default directory for `HYPERION_HOME`, or click **Browse** and navigate to an installation directory, and click .

If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash (-), underscore (_), backslash (\), forward slash (/), dot (.), colon (:). The colon (:) is supported for Windows platforms only to specify the drive (for example, `C:\`).

Note:

If a `HYPERION_HOME` location was previously defined, a message is displayed saying that the system detected the previously defined location. Click **Next** to proceed with the installation. If you ever need to change the location of `HYPERION_HOME`, see [“Changing the Hyperion Home Location” on page 35](#)

- 7 Click **Next** to accept the default directory for installation of Planning files, or click **Browse** to select an installation directory, and click **Next**.

If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash

(-), underscore (_), backslash (\), forward slash (/), dot (.), colon (:). The colon (:) is supported for Windows platforms only to specify the drive (for example, C:\).

8 Select Typical or Custom depending on whether you are installing on the same machine:

- Select **Typical** to install Planning and Performance Management Architect components, and the Planning ADM Driver on the same machine. Then click **Next**.

The Typical option installs Performance Management Architect, Planning Web Server and Planning ADM Driver. Performance Management Architect has two components: Application server and Web Server. Application server installs the Dimension server, Data Synchronization server and files required for interface datasources. Web server installs the Performance Management Architect Web Tier component. The Planning ADM Driver needs to be on the same machine as the Financial Reporting machine.

- Select **Custom** to install one or more components on a machine. Then click **Next**.

Note:

Oracle's Hyperion® Business Rules is now a component of Administration Services and is installed automatically when you install Administration Services. For more information, see the *Essbase Administration Services Installation Guide*

9 Review the selected components and destination installation directory, and click **Next to continue the installation or click **Back** to make changes.**

10 After the installation is complete, click **Finish.**

11 Optional: If you are installing Planning on a 64-bit machine, you can only install Performance Management Architect on a Windows 32-bit machine.

- a. Run the 32-bit Windows Planning setup program to install Performance Management Architect by completing steps 1–6 above.
- b. Select the **Custom** install option and click **Next**.
- c. Optionally, select Performance Management Architect and click **Next**.
- d. Continue the installation at step 8.

12 If you are installing Performance Management Architect you must install it on a 32-bit Windows machine.

- a. If you downloaded Planning software from Oracle E-Delivery, navigate to the directory where you downloaded the installation program. Run the `setup.bin` from:

`/vol11/<folder>/setup.bin` where `<folder>` is the location of the installation program.
- b. Review the Welcome screen, then click **Next**.
- c. From the drop-down list, select the location for Planning installation. Then click **Next**.
- d. Read the license agreement, then select **I AGREE** to accept the terms. Click **Next**.
- e. Click **Next** to accept the default directory for `HYPERION_HOME`, or click **Browse** and navigate to a different installation directory, and click **Next**. If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash(-), underscore

(_), backslash (\), forward slash (/), dot (.), colon (:). The colon character (:) is supported for Windows platforms to specify the drive (for example, C:\).

Note:

If you already have an existing HYPERION_HOME location, a message is displayed saying that the system detected the current location. Click **Next** to proceed with the installation.

- f. Click **Next** to accept the default directory for installation of Performance Management Architect files, or click **Browse** to select a different install directory and click **Next**. If you change the default directory, Hyperion recommends that the directory path not contain spaces. You can enter only English alphanumeric characters and these special characters: dash (-), underscore (_), backslash (\), forward slash (/), dot (.), colon (:). The colon character (:) is supported for Windows platforms to specify the drive (for example, C:\).
- g. Select **Custom** and click **Next**.
- h. Select **Performance Management Architect** (includes Application Server for Dimension server and Data Sync server and Web Server for EPM Architect Web Tier component). Then click **Next**.
- i. Verify the selected components and destination installation directory, then click **Next** to start copying files or click **Back** to make a change.
- j. If you are installing Performance Management Architect application server and do not have .NET Framework 2.0 installed, you are prompted to install it. Select **Install Microsoft .Net Framework 2.0 and continue** to have .NET 2.0 automatically installed.
- k. Click **Finish**.
- l. If you installed Performance Management Architect and had .NET automatically installed, select **Yes** to reboot your machine.

Configuring Using Hyperion Configuration Utility

Hyperion Configuration Utility is a common tool that installs automatically with Hyperion products. Although you must use it to set up new products that you install, it also enables you to reconfigure existing products and upgraded products. Use the utility on each computer to which a product is installed. Configuration of Planning involves these tasks:

- Product option activation — If prompted, select the product features that you are authorized to use in order to comply with your license agreement. This will be skipped if there are no specific features to select.
- Shared Services registration — To use Shared Services to provision and share users among Hyperion product applications.
- Relational database configuration—To store and retrieve application data in a database repository and create the PlanningSystemDB.properties file.
- Application server deployment—To deploy the application automatically to an application server.

- Product-specific Configuration—Required in Planning to register a product instance and configure a datasource.
- Shared Services deregistration — To deregister products from with Shared Services before upgrading or uninstalling these products.

For information about the order of configuration tasks, acceptable characters, and resolving configuration issues, see:

- [“Task Sequence ” on page 40](#)
- [“Restricted Characters ” on page 40](#)
- [“Troubleshooting ” on page 40](#)

Task Sequence

Hyperion recommends that you configure products separately and perform all configuration tasks. However, you can configure products simultaneously performing all, or specific, configuration tasks.

Restricted Characters

Only enter alphanumeric, dash (-), dot (.), underscores (_), and tildes (~) during configuration. Tildes are only supported on Microsoft Windows. All other characters are not supported.

Troubleshooting

Terminating configuration for one product does not stop the configuration of other products. All configuration warnings and errors are logged as follows:

UNIX — \$HYPERION_HOME/logs/config

If you encounter errors, perform these tasks:

- Configure products individually.
- See the *Hyperion Installation and Configuration Troubleshooting Guide* for information about configuration checks, debugging using logs, troubleshooting methodology, and solutions to common configuration issues.

Configuring Product Upgrades

You can use Hyperion Configuration Utility to configure and reconfigure supported product upgrades. Note the following:

- If you upgraded Shared Services, configure it before configuring other products.
- Configure upgraded products individually.
- Deploy to the same database you used when you configured the previous product release.

If you do not want to use Shared Services with the products you are upgrading, select Shared Services Deregistration during configuration.

Satisfying Initial Requirements

If you are using Hyperion Configuration Utility for the first time, perform these tasks:

Table 16 Configuration Requirements

Task	Reference
Satisfy system and product-specific requirements.	“System Requirements” and “Planning Hyperion Installations” in the <i>Hyperion Installation Start Here</i>
Gather the information you need to configure products.	“Hyperion Configuration Utility Worksheets” in the <i>Hyperion Installation Start Here</i>
Install, configure, and start the Shared Services server.	<i>Hyperion Shared Services Installation Guide</i>

Before you begin, ensure that you have completed all necessary installation and configuration tasks for Shared Services, and Essbase (including Oracle's Essbase® Administration Services).

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

Note:

Before beginning the configuration process, ensure that you have installed the Java application server you plan to use. Also, ensure that Shared Services server is up and running for registration of products with Shared Services. Configuration of Planning requires that you start Essbase server before using the Configure Datasource task in the Hyperion Configuration Utility.

Configuring Planning

Run Hyperion Configuration Utility on the computer hosting the products to configure or reconfigure.

► To configure Planning:

1 Launch Hyperion Configuration Utility as follows:

- At the end of installation by selecting **Launch Hyperion Configuration Utility** on the last panel.
- Using a method:
 - On UNIX:
 - Change to `<HYPERION_HOME>/common/config` and type `configtool.sh`.
 - Change to `<HYPERION_HOME>/common/config` and type `configtool.sh - console`.

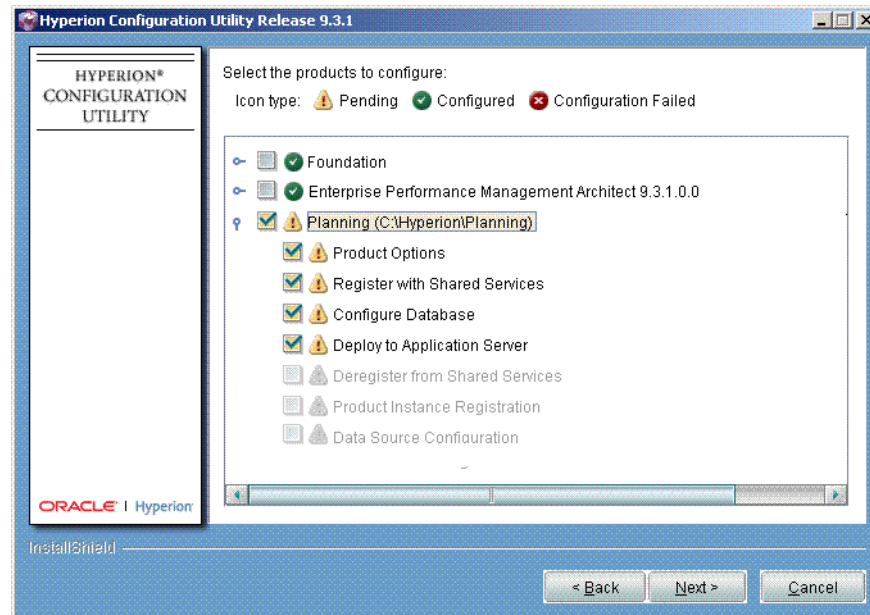
2 Select the language in which to configure and click **Next**.

3 On the Welcome page, click **Next**.

A list of installed products is displayed. Icons next to the product name indicate the status of the configuration for each product:

- Pending—Product is not yet configured.
- Configured—Product is successfully configured.
- Configuration Failed—Product configuration was attempted but unsuccessful.

4 Select Planning, and tasks will be automatically selected that you need to perform. Then click **Next**.



5 Perform the following tasks:

Table 17 Configuration Tasks

Selection	Task
Product Options	<p>If prompted, select the product features that you are authorized to use based on your purchase and licensing agreement. See “Hyperion License Compliance” in <i>Hyperion Installation Start Here</i>.</p> <p>During product configuration, Hyperion Configuration Utility copies <code>registry.properties</code> to <code><HYPERION_HOME>/common/config</code> on the server on which you ran Hyperion Configuration Utility. After configuration, open this file in any text editor to confirm and specify which product options are activated. See “Hyperion License Compliance” in <i>Hyperion Installation Start Here</i></p>
Shared Services Registration	<p>Make sure that the Shared Services server is running. Review the details displayed and enter your Shared Services password (default is <i>password</i>) “Registering With Shared Services” on page 43.</p>
Configure Database	<ol style="list-style-type: none">Start your databaseSelect the database type.Enter the information in “Configuring Databases” on page 44.

Selection	Task
Deploy to Application Server	<p>a. Start the application server.</p> <p>b. Select the application server, then an option:</p> <ul style="list-style-type: none"> ● Automatic— Hyperion Configuration Utility deploys all files to the application server, resulting in no or minimal post-deployment tasks: <ul style="list-style-type: none"> ○ WebLogic: If disk space is inadequate, specify another location for the WAR file and redeploy. ○ WebSphere: If disk space is inadequate, Hyperion Configuration Utility places <code>java.io.tmpdir</code> in <code><HYPERION_HOME>/temp</code>. After deployment, the <code>temp</code> folder is deleted. ● Manual— In Planning, you do not need to select the Manual option in the Hyperion Configuration Utility in order to perform a manual deployment. The EAR or WAR file is placed in this directory, enabling you to manually deploy after configuration: <pre>ProductHome>/<AppServer>/InstallableApps/common WebLogic 8.1.x — <ProductHome>/<AppServer>/ InstallableApps</pre> <p>c. Enter the information in “Deploying to the Application Server” on page 45.</p>
Create a Planning Instance	Once you have completed the first set of tasks, return to the product selection panel to Create a Planning Instance. See “Creating a Planning Instance” on page 49
Configure a Data Source	After creating the instance, return to the product selection panel and Configure a Datasource. See “Configuring a Datasource” on page 50

The status of each task is displayed. If configuration is successful, perform any required post-configuration tasks and start the product.

If errors display, perform these tasks:

- Configure products individually and perform tasks separately.
- See the *Hyperion Installation and Configuration Troubleshooting Guide* for information about resolving configuration issues.

Configuration time depends on the products and tasks you selected. Progress is recorded in `configtool.log` as follows:

```
<HYPERION_HOME>/logs/config
```

6 Click Finish.

- 7 Important:** After you configure each product, you must open `registry.properties`—in `<HYPERION_HOME>/common/config` on the server on which you ran Hyperion Configuration Utility—to review and edit the product options. You must complete this step to ensure you comply with your license agreement and to activate features you are licensed to use. See “Hyperion License Compliance” in *Hyperion Installation Start Here*.

Selecting Product Options

If you have additional modules such as Oracle's Hyperion® Capital Expense Planning or Oracle's Hyperion® Workforce Planning, you will be prompted to select those options from a list. Otherwise, the Product Options panel is automatically checked as completed and no action needs to be taken.

Registering With Shared Services

By default, the user you specify during registration is pre-provisioned as `admin`. This enables you to log on to Shared Services after configuration using `admin/password`, to create and provision users.

Table 18 Shared Services Registration

Field	Description
Server Name	The name of the computer where the Shared Services server is installed. Caution! Do not specify an IP address, especially in DHCP environments, or enter restricted characters.
Port	The default or custom Shared Services server port number.
User	The username of the Shared Services Administrator.
Password	The password of the Shared Services Administrator.
SSL	Select to use Secure Sockets Layer for encryption. See the <i>Hyperion Product SSL Configuration Guide</i> .

Configuring Databases

When you configure Hyperion products to use a database, Hyperion Configuration Utility ensures that the database is connected and is a supported database type. For a list of supported databases for this release, see *Hyperion Installation Start Here*.

In Planning, the configuring a database task also generates the `PlanningSystemDB.properties` file. This properties file contains the location of the relational database that each Planning application uses. You must regenerate it using the Configuring a Database option only if you accidentally delete the file or change databases.

The first time you configure, a default database name (`hypdb`), and username (`hypuser`), is displayed. Change the defaults to match the name of the database and user you already created.

Note:

If you perform the Configure a Database task after initial installation, ensure that Planning is registered with Shared Services and deployed to an application server before configuring the database.

Note:

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

Note:

If you are configuring a database for Planning and a previously configured database is detected, you are prompted to drop all tables and create a new database or reuse the existing database.

Hyperion Configuration Utility Release 9.3.1

HYPERION* CONFIGURATION UTILITY

Database Configuration Details

Database type: Microsoft SQL Server

Database details:

Server: lagoetz3.hyperion.com

Port: 1433

Product	Database	User Name	Password
Planning (C:\Hyperio...)	hypdb	hypuser	

InstallShield

< Back Next > Cancel

Note:

Table 19 Database Configuration

Field	Description
Server	Name of the computer or server hosting the database.
Port	Server port number on which the database listens.
Product	Name of each product and its installation location.
Database or SID (Oracle only)	Database name or the Oracle system identification (database instance). Do not use restricted characters.
Username	The name of the database owner.
Password	The password of the database owner. Note: If this changes, reconfigure as described in the <i>Hyperion Installation Start Here</i> .

Field	Description
Data Tablespace (Oracle)	Name of an existing tablespace used to create tables. The data tablespace is the logical portion of the database used to allocate storage for table data.
Index Tablespace (Oracle)	Name of an existing tablespace used to create database indexes. The index tablespace is the logical portion of the database used to allocate storage for index data.

Deploying to the Application Server

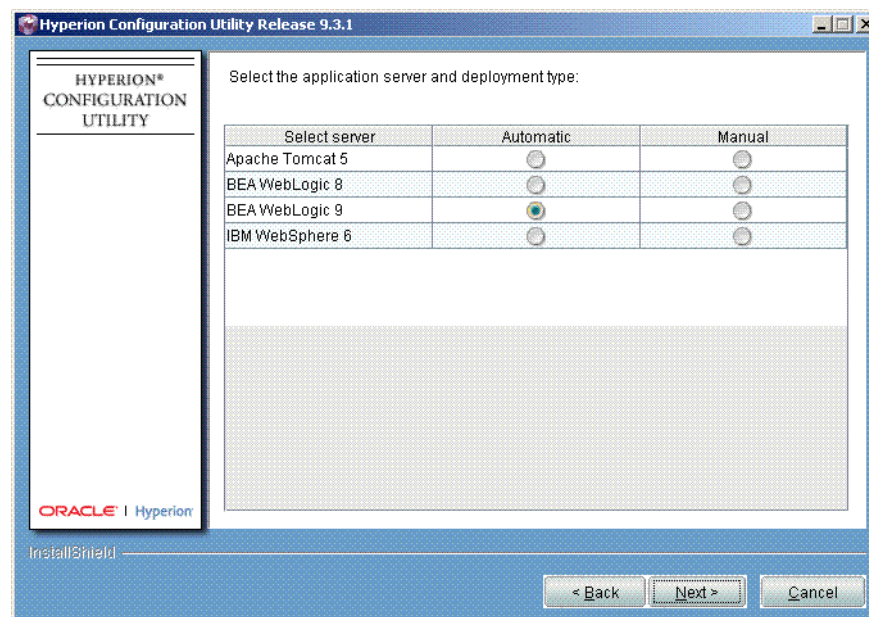
To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use one of the following:

- Oracle OC4J instance
- WebLogic server
- WebSphere application server

Deploying more than one Web application to the same OC4J instance, WebLogic server, or WebSphere application server may yield unsuccessful results.

Note:

On WebLogic, a default username and password of `hyperion` is used internally for deployment.



Oracle 10.1.2.0.2 or Oracle 10.1.3.1 can be used as a Java application server but must be manually deployed. If you are not automatically deploying any Java application server, see [“About Manual Configuration” on page 143](#). In Planning, you do not need to select the Manual option in the Hyperion Configuration Utility in order to perform a manual deployment.

Note:

For Planning on an HP-UX 64-bit machine, you can only deploy to Tomcat.

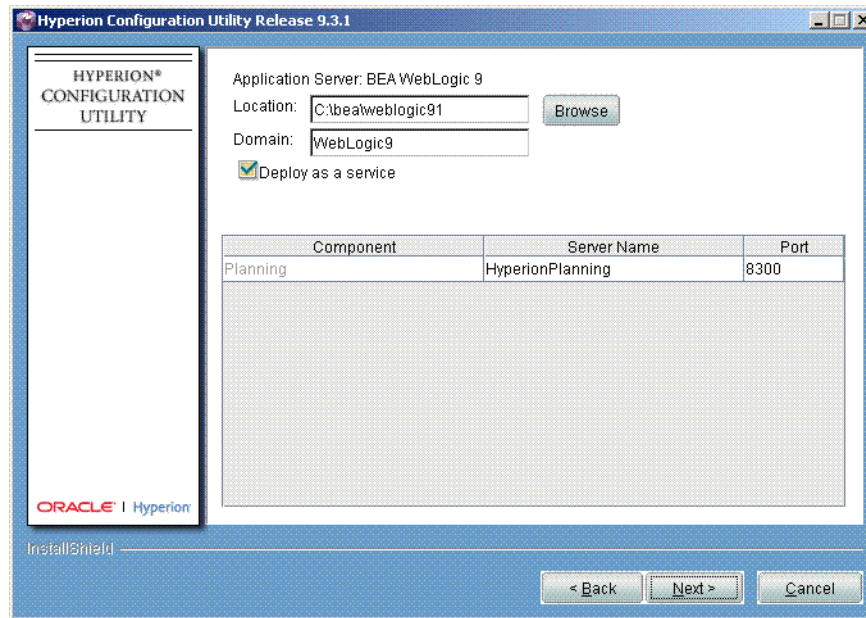


Table 20 Automatic Deployment Parameters

Field	Description
Location	<p>Path to the application server installation directory:</p> <ul style="list-style-type: none"> WebSphere Base: <code>/opt/WebSphere/AppServer</code> WebSphere Express: <code>/opt/IBM/WebSphere/Express51/AppServer</code> WebLogic 8.1.x: <code>/opt/bea/weblogic81</code> WebLogic 9.1.x: <code>/opt/bea/weblogic91</code>
Deploy as a service	<p>Selected by default to register the web application as a Windows service listed in Windows Control Panel. See “Startup Dependencies” in the <i>Hyperion Installation Start Here</i>.</p>
Profile (WebSphere)	<p>Name of the profile where the applications are deployed. By default, all applications deploy to the same profile. To change the profile name, see “WebSphere and WebLogic 9.1.x” on page 123.</p>
Domain (WebLogic)	<p>Default name of the domain where the applications are deployed. For WebLogic 9.1.x, all applications deploy to the same domain. To change the domain name, see “WebSphere and WebLogic 9.1.x” on page 123.</p>

Field	Description
BEA Home (WebLogic)	Path to the BEA Home directory (e.g., /opt/)
Component	Products being deployed. Some products display as components.
Server Name	Enter the name of the server where you will access the product. Do not include spaces. This name is used as the product directory name in <HYPERION_HOME>/deployments
Port	To change the default port, enter a unique port number that does not exceed 1025 to avoid conflicts with third-party port assignments. See “Ports” in the <i>Hyperion Installation Start Here</i> .

Caution!

If you are using WebSphere 6.0.x, you must back up the `jdom.jar` file (or `jdom-b9.jar`) installed by WebSphere (located at `/opt/WebSphere/AppServer/java/lib/jdom-b9.jar`) and replace it with the `jdom.jar` that Planning installed in the `/Hyperion/Planning/lib` directory. Until you do so, you cannot deploy a Planning Application View in Performance Management Architect or a Planning application in Classic application administration.

What Happens During Deployment

WebSphere and WebLogic 9.1.x

Hyperion Configuration Utility deploys each application to the same WebSphere profile or WebLogic domain. The profile or domain is created when the first application is deployed. Each application runs in a separate JVM.

Hyperion Configuration Utility deploys the application to:

`HYPERION_HOME/deployments/<AppServNameAndVersion>`

Under this directory, the `bin` directory contains start and stop scripts for all deployed applications. For each application, there is also a `setCustomParams<Product>.bat` file or a shell script where `JAVA_OPTIONS` can be changed when starting using start scripts.

To change the default profile or domain directory, modify the deployment directory parameter in the `weblogic.properties` or `websphere.properties` in:

`HYPERION_HOME/common/config/resources/<AppServName>/resources`

Note:

It is not recommended to change other parameters in this file.

WebLogic 8.1.x

Deploying to a single domain for WebLogic 8.1.x is not supported. For WebLogic 8.1.x, Hyperion Configuration Utility deploys the application to:

```
PRODUCT_HOME/AppServer/InstalledApps/<AppServName>/<Version>
```

Increasing the Heap Size for Java Application Servers

Depending on the size of your environment, you may need to increase the heap size for your Java application server in order to get better performance or to upgrade large applications. While the default can be used in a test environment (single server type configuration), the heap size needs to be increased for use in a production environment (multiple servers).

- To increase the heap size for Weblogic 9.1 or 8.1.6:

- 1 Open the startup script, (for example, for Planning: `startHyperionPlanning.sh`).
- 2 Add this line to set the heap size (this is an example): `set MEM_ARGS=-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for WebSphere 6:

- 1 For Planning, from the WebSphere Admin console, select **Servers > Application Servers**.
- 2 Select **HyperionPlanning**. (For Performance Management Architect, substitute the Performance Management Architect server name for HyperionPlanning.)
- 3 Under Server Infrastructure, expand **Java and Process Management > Process Definition**.
- 4 Increase the Max Heap Size. The default Max Heap Size is 512 MB.

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for Tomcat 5.0.28:

- 1 Open the startup script, (for example, `startHyperionPlanning.sh`).
- 2 Search for the following: `set JAVA_OPTS=-server`
- 3 Append the following to the end of that line (this is an example): `-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

Note:

If the Tomcat application server does not start after making this change, replace the word “start” with “run” in the `startup.bat` file.

Planning-Specific Configuration Tasks

There are two tasks required for Planning configuration using the Hyperion Configuration Utility.

- Product instance registration
- Configuring a datasource

Creating a Planning Instance

An instance is a name for a group of Planning applications. An instance may contain one or many applications associated with it. Each application gets associated with an instance when an application is created. When you create an instance, it displays in the `HSPSYS_CLUSTER` table in the system database. The active instance name gets written as the `INSTANCE` property value in `PlanningSystemDB.properties`.

You can designate an instance as the “active instance” during instance creation or at any time using the “Product Instance Registration” option in the Configuration Utility. If you designate an instance as the “active instance,” only applications associated with that instance are displayed in Workspace.

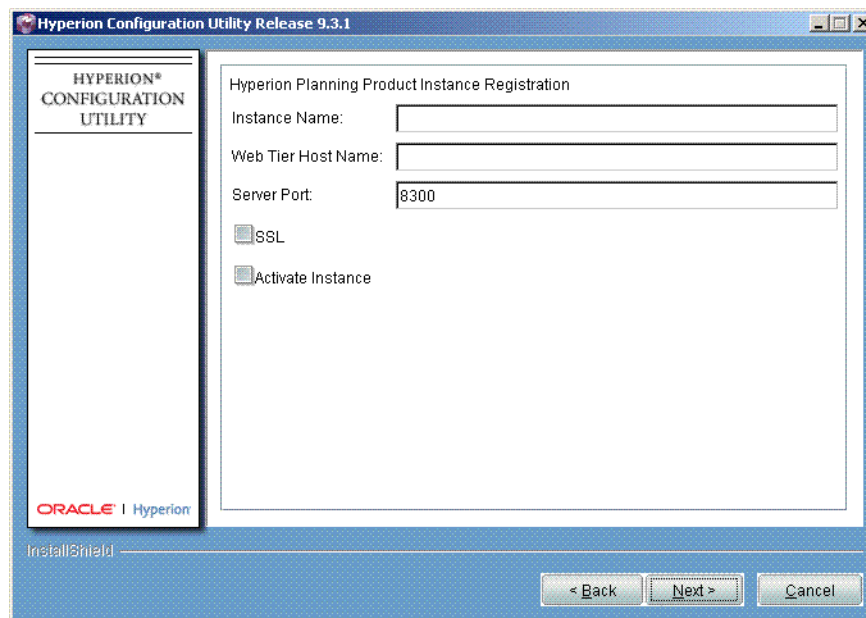
Caution!

If you add or change the active instance, you must restart the Planning application server in order for the updated application list to be displayed in Workspace.

Applications get associated with an instance when an application is created, and that association can be modified using the “Re-associate Instance and Application” task. This is useful, for example, if you decide that you want an application associated with a different server. For details, see the *Hyperion Planning - System 9 Administrator's Guide*.

➤ To create the Planning instance:

- 1 From the product selection panel displayed after launching the Hyperion Configuration Utility, select **Planning** and **Product Instance Registration**. Then click **Next**.
 - a. In Hyperion Planning Instance Registration, select **Create Instance**. Then click **Next**.



- b. Enter an instance name.
- c. Enter the full name of the machine where you installed the Planning Web Server component.

Note:

In a multi-server environment, this should be the load balancer, and in a single server environment it is the same as the Planning server.

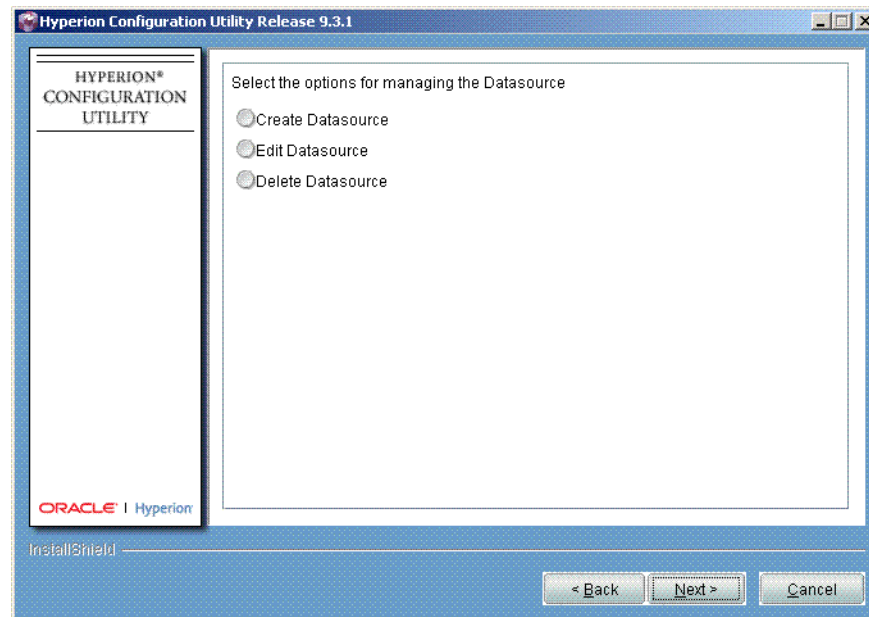
- d. Leave the default server port (8300) or make a change if necessary. The port number should be the port used for application server deployment.
 - e. To enable SSL (Secure Sockets Layer), select **SSL**.
 - f. Select **Activate Instance** if you only want to display those applications in Workspace that are associated with this instance. If you want to see all applications in Workspace, do not select this checkbox.
 - g. Click **Next**.
- 2** Select **Yes** and click **Next** in response to the prompt to go back to the product selection panel and configure a data source.

Configuring a Datasource

A datasource must be created to link the relational database and the Essbase Server. A datasource must be created each time you create an application and must be associated with an instance. Ensure the Essbase Server is running before using this task.

- To configure a datasource:
 - 1** From the product selection panel displayed after launching the Hyperion Configuration Utility, select **Planning** and **Data Source Configuration**. Then click **Next**.

- a. Select **Create Datasource**.



- b. Enter a name for the datasource and description. Then click **Next**.
- c. Select the instance you created during Product Instance Registration to associate it with the data source.
- d. Select a database type (SQL, Oracle, or DB2). Then, click **Next**.
- e. Enter the database details:
- i. Server hosting the database
 - ii. Accept the default port or make a change. Defaults are: SQL (1433), Oracle (1521), or DB2 (50000)
 - iii. Name of the product
 - iv. Database name
 - v. Database username and password
- f. Enter details about the Essbase server:
- i. Essbase server name
 - ii. Essbase username and password
 - iii. Click **Next**.

2 Select **No** and click **Finish**.

3 If you are using Performance Management Architect, continue by completing the configuration tasks in the next chapter.

Note:

Performance Management Architect must be installed and configured on a Windows 32-bit machine.

Review and Edit Product Options

Important: After you configure Planning, you must open the `registry.properties`—in `<HYPERION_HOME>\common\config` on the server on which you ran the Hyperion Configuration Utility—to review and edit the product options. You must complete this step to ensure you comply with your license agreement and to activate features you are licensed to use. See “Hyperion License Compliance” in *Hyperion Installation Start Here*.

Reconfiguring Products

Hyperion Configuration Utility enables you to reconfigure products to incorporate changes in your environment such as a different application server.

To reconfigure, launch Hyperion Configuration Utility on the computer hosting the product, and follow the procedures in this chapter.

Note:

If you reconfigure a database, restart the application server afterward.

Configuring Performance Management Architect

Task Sequence for Performance Management Architect

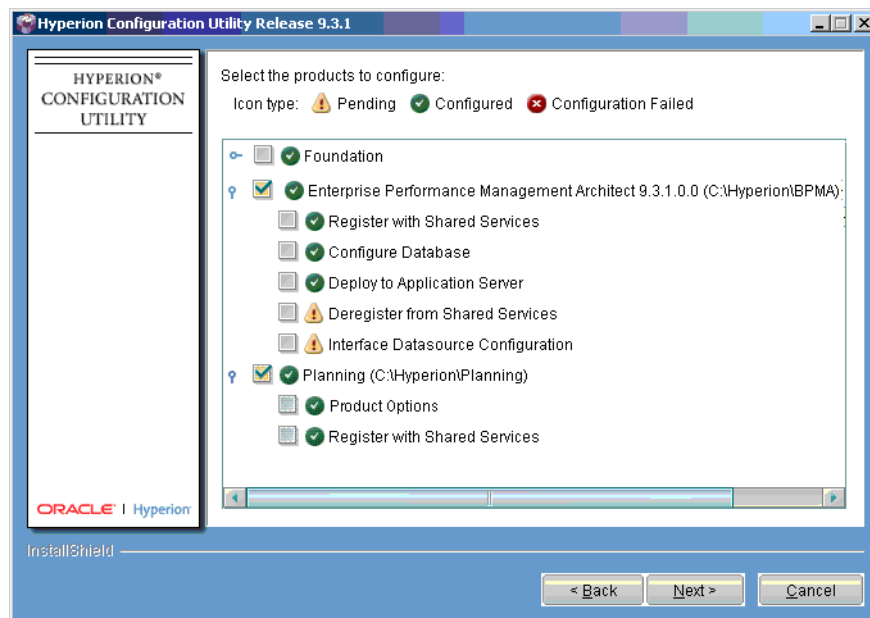
Follow this sequence to configure Performance Management Architect for the first time. If you are not familiar with using the Hyperion Configuration Utility, see “[Satisfying Initial Requirements](#)” on page 40 before you begin. Performance Management Architect can only be configured on a Windows 32-bit machine. If you are using Classic Application Administration to create applications, skip this chapter.

Hyperion Configuration Utility enables you to perform multiple configuration tasks in one session. Perform these tasks to configure Performance Management Architect:

- Shared Services registration
- Database configuration
- Application server deployment

All input for Shared Services registration, database configuration, and application server deployment is gathered by Hyperion Configuration Utility and configuration for these tasks occurs once at the end.

There is an additional task in the Hyperion Configuration Utility under Performance Management Architect, called Interface Datasource Configuration. This task is required if you want to use interface tables in Performance Management Architect. See the Managing Dimension chapter and the Synchronizing Data chapter of the *Hyperion Enterprise Performance Management Architect Administrator's Guide*.



What you see on the product selection dialog depends on the components installed on that machine.

Registering Performance Management Architect with Shared Services

Shared Services functionality is programmed into Hyperion products to enable user provisioning, and single-sign on among Hyperion product applications. By default, the user you specify during registration is pre-provisioned as `admin`. This enables you to log on to Shared Services after configuration using `admin/password`, to create and provision users.

Products that implement Shared Services functionality require access to the Shared Services server and to a database for Shared Services. When a product is registered with Shared Services, a registration file is created under its corresponding product directory in Shared Services.

- To register Performance Management Architect with Shared Services:

1 Specify Shared Services server information:

Table 21 Shared Services Registration

Field	Description
Server Name	The name of the computer where the Shared Services server is installed. Caution! Do not specify an IP address, especially in DHCP environments, or enter restricted characters.
Port	The default or custom Shared Services server port number.
User	The username of the Shared Services Administrator.
Password	The password of the Shared Services Administrator.

Field	Description
SSL	Select to use Secure Sockets Layer for encryption. See the <i>Hyperion Product SSL Configuration Guide</i> .

- 2 Click **Next** to configure the database for Performance Management Architect.

Configuring a Performance Management Architect Database

The Performance Management Architect database is used for the Dimension server. When you configure Hyperion products to use a database, Hyperion Configuration Utility ensures that the database is connected and is a supported database type.

For a list of supported databases for this release, see *Hyperion Installation Start Here*.

If you changed a database-owner password in your relational database, you need to change it in the Hyperion Configuration Utility. For details, see the *Hyperion Installation Start Here*. If you are configuring a Microsoft SQL Server database, Hyperion Configuration Utility supports Windows Authentication for a SQL Server connection. For instructions, see ???.

Note:

Performance Management Architect does not support Windows authentication for a Microsoft SQL Server database.

- To configure a Performance Management Architect database:

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

Note:

To use DB2 with Performance Management Architect, there are additional requirements for installing .NET Data Provider and DB2 Runtime Client. See [“Creating IBM DB2 Databases for Performance Management Architect” on page 23](#).

The database configuration details page is displayed. This is an example using an Oracle database.

Hyperion Configuration Utility Release 9.3.1

HYPERION* CONFIGURATION UTILITY

Database Configuration Details

Database type: Oracle

Database details:

Server: myserver.hyperion.com

Port: 1521

Product	SID	User Name	Password	Data Tablespace	Index Tablespace
Enterprise...	oradb	jsmith	*****	<default>	<default>

ORACLE | Hyperion

InstallShield

< Back Next > Cancel

2 Specify database information:

Table 22 Database Configuration

Field	Description
Server	Name of the computer or server hosting the database.
Port	Server port number on which the database listens.
Product	Name of each product and its installation location.
Database or SID (Oracle only)	Database name or the Oracle system identification (database instance). Do not use restricted characters.
Username	The name of the database owner.
Password	The password of the database owner. Note: If this changes, reconfigure as described in the <i>Hyperion Installation Start Here</i> .
Data Tablespace (Oracle)	Name of an existing tablespace used to create tables. The data tablespace is the logical portion of the database used to allocate storage for table data.
Index Tablespace (Oracle)	Name of an existing tablespace used to create database indexes. The index tablespace is the logical portion of the database used to allocate storage for index data.

3 Click **Next** after viewing configuration status.

4 Click **Next** to continue configuring Performance Management Architect by deploying to an application server.

Deploying Performance Management Architect to an Application Server

Performance Management Architect application server deployment involves two components: the Performance Management Architect server (EPMWebTier) and the Data Synchronization server (EPMDDataSynchronizer).

These Java application servers are supported for Performance Management Architect.

- WebLogic 9.1 or 8.1.6
- WebSphere 6.0.2.11 or 6.1
- Tomcat 5.0.28
- Oracle 10g (10.1.2.0.2 or 10.1.3.1) as a manual deployment only

Automatic and Manual Deployments

If you are deploying your product to a single application server, decide between these deployment options:

- Automatic—Select the Deploy to Application Server task and the Automatic deployment type in Hyperion Configuration Utility to have Hyperion Configuration Utility deploy all files to the application server. In most cases, no other deployment tasks are required.
- Manual—Bypass the Deploy to Application Server task in Hyperion Configuration Utility and perform the manual deployment tasks for your application server in [“About Manual Configuration” on page 143](#)

Deploying to an Application Server

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use one of the following:

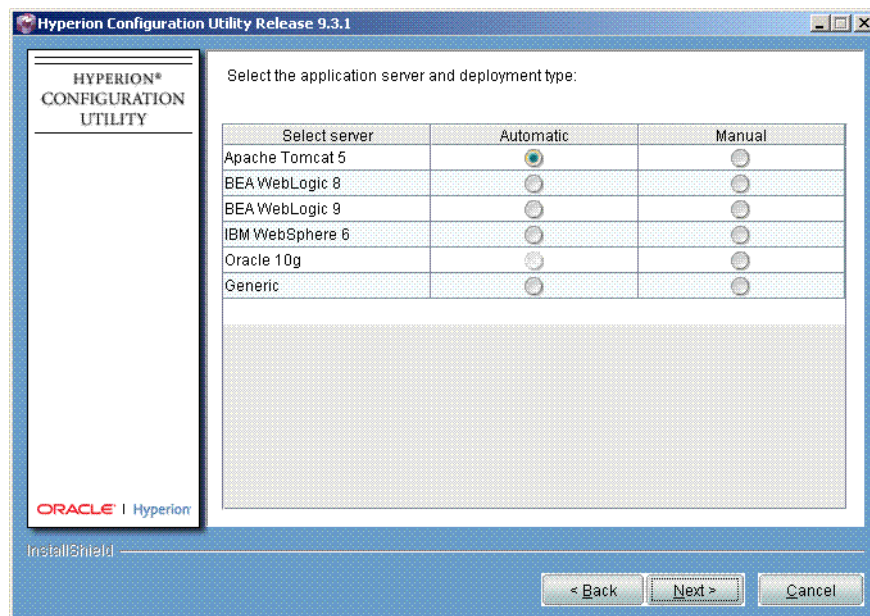
- Oracle OC4J instance
- WebLogic server
- WebSphere application server

Deploying more than one Web application to the same OC4J instance, WebLogic server, or WebSphere application server may yield unsuccessful results.

Note:

On WebLogic, a default username and password of `hyperion` is used internally for deployment.

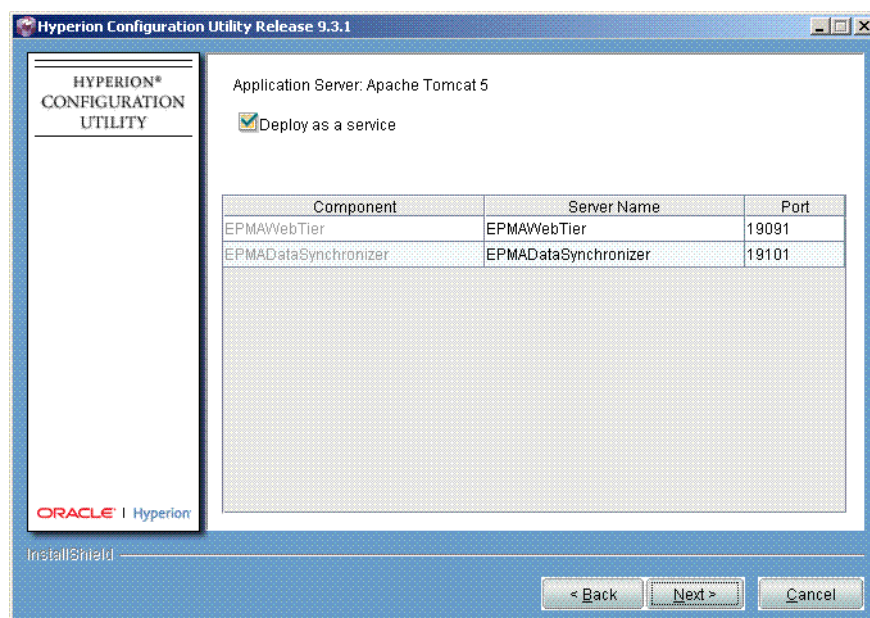
- To deploy Performance Management Architect to an application server:
 - 1 Select the application server you are using and select **Automatic** as the deployment type, and click **Next**.
To deploy Performance Management Architect to Oracle 10g, select **Manual**.



Note:

For all application servers, for automatic deployment, Hyperion Configuration Utility determines whether the available disk space is adequate for the size of the EAR or WAR file (as specified in the product configuration file). If the disk space is inadequate, you must specify a location for storage of the EAR or WAR file and repeat the deployment process. On WebSphere, for automatic deployment, when deployment starts, Hyperion Configuration Utility determines whether the available disk space for the `java.io.tmpdir` folder is adequate. If the disk space is inadequate, Hyperion Configuration Utility relocates the `java.io.tmpdir` file to the directory. After deployment is complete, the `temp` folder is deleted.

An example (using Tomcat):



2 In the **Application Server** dialog box, specify application server information:

Table 23 Automatic Deployment Parameters

Field	Description
Location	Path to the application server installation directory: <ul style="list-style-type: none">● WebSphere Base: or /opt/WebSphere/AppServer● WebSphere Express: /opt/IBM/WebSphere/Express51/AppServer● WebLogic 8.1.x: /opt/bea/weblogic81● WebLogic 9.1.x: /opt/bea/weblogic91
Deploy as a service	Selected by default to register the web application as a Windows service listed in Windows Control Panel. See “Startup Dependencies” in the <i>Hyperion Installation Start Here</i> .
Profile (WebSphere)	Name of the profile where the applications are deployed. By default, all applications deploy to the same profile. To change the profile name, see “WebSphere and WebLogic 9.1.x” on page 123
Domain (WebLogic)	Default name of the domain where the applications are deployed. For WebLogic 9.1.x, all applications deploy to the same domain. To change the domain name, see “WebSphere and WebLogic 9.1.x” on page 123
Component	Products being deployed. Some products display as components.
Server Name	Enter the name of the server where you will access the product. Do not include spaces. This name is used as the product directory name in
Port	To change the default port, enter a unique port number that does not exceed 1025 to avoid conflicts with third-party port assignments. See “Ports” in the <i>Hyperion Installation Start Here</i> .

3 Click **Next**.

If you installed the Performance Management Architect Web Server component during installation, continue with step 4 to enter details about the Dimension server and Data Synchronizer server in order to enable communication with the Web server. The information from these two dialogs is loaded into a configuration file called `awbcluster.xml`.

- 4 Accept the defaults for the Dimension server details or make a change, if necessary (for example, if IIS is on a port other than 80 or the server is on a different machine.)

Table 24 Dimension Server fields

Field	Description
Server	Server name
Port	IIS Port number (defaults to 80)
SSL	Select if you are using Secure Sockets Layer (SSL)
Maximum connections	Maximum simultaneous connections to the server (defaults to 20.)
Maximum idle connections	Maximum number of idle connections in the pool. If the number of idle connections exceeds this limit, the connection is closed (defaults to 10.)
Maximum Wait Time	Connection timeout (in milliseconds) for idle connections. If a connection is idle longer than this time, the connection is closed (defaults to 60000.)

Note:

Hyperion recommends that you accept the default connection details.

- 5 Click **Next**.

- 6 Accept the defaults for the Data Synchronization server details or make a change if necessary.

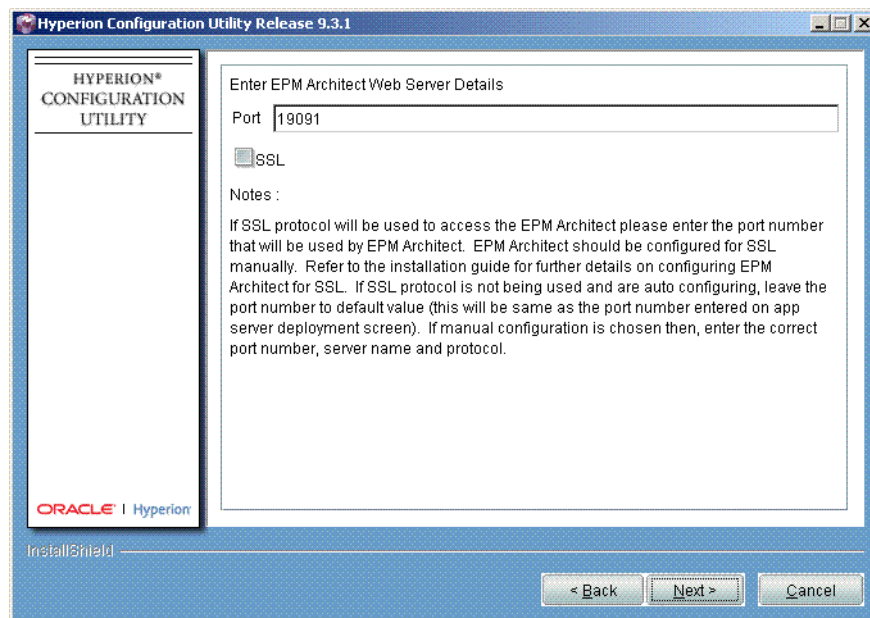
Table 25 Data Synchronization Server fields

Port	Data Synchronization port number (defaults to 19101.)
Maximum connections	Maximum simultaneous connections to the server (defaults to 20.)
Maximum idle connections	Maximum number of idle connections in the pool. If the number of idle connections exceeds this limit, the connection is closed (defaults to 10.)
Maximum Wait Time	Connection timeout (in milliseconds) for idle connections. If a connection is idle longer than this time, the connection is closed (defaults to 60000.)

Note:

Hyperion recommends that you accept the default connection details.

- 7 Click **Next**.



- 8 If you are using SSL (Secure Sockets Layer), change the port number to your SSL port number and select the **SSL** check box. This information is stored in Shared Services. Then click **Next**.
- 9 After application server deployment has completed, select **No** and click **Next** in response to the prompt to return to the product selection panel.
- 10 Click **Finish**.

What Happens During Deployment

WebSphere and WebLogic 9.1.x

Hyperion Configuration Utility deploys each application to the same WebSphere profile or WebLogic domain. The profile or domain is created when the first application is deployed. Each application runs in a separate JVM.

Hyperion Configuration Utility deploys the application to:

`HYPERION_HOME/deployments/<AppServNameAndVersion>`

Under this directory, the `bin` directory contains start and stop scripts for all deployed applications. For each application, there is also a `setCustomParams<Product>.bat` file or a shell script where `JAVA_OPTIONS` can be changed when starting using start scripts.

To change the default profile or domain directory, modify the deployment directory parameter in the `weblogic.properties` or `websphere.properties` in:

`HYPERION_HOME/common/config/resources/<AppServName>/resources`

Note:

It is not recommended to change other parameters in this file.

WebLogic 8.1.x

Deploying to a single domain for WebLogic 8.1.x is not supported. For WebLogic 8.1.x, Hyperion Configuration Utility deploys the application to:

`PRODUCT_HOME/AppServer/InstalledApps/<AppServName>/<Version>`

Increasing the Heap Size for Java Application Servers

For both Planning and Performance Management Architect, depending on the size of your environment, you may need to increase the heap size for your Java application server in order to get better performance or to upgrade large applications. While the default can be used in a test environment (single server type configuration), the heap size needs to be increased for use in a production environment (multiple servers). For Performance Management Architect, these are guidelines to use for increasing heap size:

Number of Members	Heap Size Setting
Less than 10000	-ms128 -mx256 (min 128 max 256)
Between 10,000 – 30,000	-ms256 -mx512
Over 30,000	-ms512 -mx1024

- To increase the heap size for Weblogic 9.1 or 8.1.6:

- 1 **Open the startup script.** For example: `startEPMAWebTier.bat`).
- 2 **Add this line to set the heap size (this is an example):** `set MEM_ARGS=-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for WebSphere 6:

- 1 **For Planning**, from the WebSphere Admin console, select **Servers > Application Servers**.
- 2 **Select HyperionPlanning.** (For Performance Management Architect, substitute the Performance Management Architect server name for HyperionPlanning.)
- 3 Under Server Infrastructure, expand **Java and Process Management > Process Definition**.
- 4 **Increase the Max Heap Size.** The default Max Heap Size is 512 MB.

Note:

The actual values you need to enter depend on the size of your environment.

- To increase the heap size for Tomcat 5.0.28:

- 1 **For Performance Management Architect**, open the startup script, for example: `startEPMAWebTier.bat`.

- 2 Search for the following: `set JAVA_OPTS=-server`
- 3 Append the following to the end of that line (this is an example): `-Xms512m -Xmx1024m`

Note:

The actual values you need to enter depend on the size of your environment.

Note:

If the Tomcat application server does not start after making this change, replace the word “start” with “run” in the `startup.bat` file.

Optional: Interface Datasource Configuration

To understand use of the Interface Datasource Configuration option in the Configuration Utility, see the *Hyperion Performance Management Architect Administrator's Guide*. This option is not required in order to install Performance Management Architect and can be done at a later time.

Post-Configuration Tasks

After you configure Planning and optionally Performance Management Architect, you must perform the following tasks:

- Install and configure Workspace.
- Optionally, if you are upgrading from Planning Release 4.0.x to 9.3.1, clean up Planning users in the Essbase database by using the UserMigUtil.
- Complete Shared Services tasks including create project, assign roles for Shared Services user management, assign global roles for Performance Management Architect, and migrate Planning users and groups to Shared Services.

Note:

If you are using the new identity attribute, see the *Hyperion Security Administration Guide*.

- Verify the Planning and Performance Management Architect installation.
- Upgrade existing applications to Release 9.3.1.

Installing and Configuring Workspace

Before you can use Planning or Performance Management Architect, you must install and configure Workspace which is part of the Oracle's Hyperion® Reporting and Analysis – System 9 installation. An important part of configuring Workspace is to enable the Web Server Plug-in.

Optionally, at the same time that you install and configure Workspace, you can install and configure Financial Reporting and/or Web Analysis. See the *Hyperion Reporting and Analysis — System 9 Installation Guide*.

After you configure Workspace, you must grant rights using the User Management Console.

Clean Up Users in Essbase Database (Optional)

Optionally, if you are upgrading from Planning 4.0.x to 9.3.1, you can use the Migrate Users utility to clean up Planning users in the Essbase database. This utility is run from a command prompt.

In the Planning 4.0.x release, for every licensed user in Planning, two users were created in each Essbase database: the named user (as determined by the external authentication provider) and the internal user. The internal user was identical to the named user, with an underscore appended, and was referred to as the “underscore user.”

As of Release 4.1, the underscore user was no longer created and Planning users and Essbase users were kept separate.

Use the Migrating Users utility to delete the underscore users that were migrated to the current release from the 4.0.x release.

► To use the Migrate Users utility:

- From a Command prompt, go to the <drive letter>:\Hyperion\ Planning\bin directory and enter these parameters: Usermigrutil <svrname> <username> <psswd> <migrtype> <confirmdelete>

Table 26 Migrate Users Utility Parameters

Parameter	Definition	Default
<svrname>	the name of your Planning server	localhost
<username>	Essbase username	supervisor
<psswd>	Essbase password	password
<migrtype>	Joyce = Users migrating from Planning Release 4.0 Yeats = Users migrating from Planning Release 4.0.1.	
<confirmdelete>	Yes—delete underscore users No—don’t delete underscore users.	

Example: Delete underscore users from the Essbase database that were migrated from Planning Release 4.0

```
Usermigrutil jsmith2 supervisor password joyce yes
```

Completing Shared Services Tasks

Once configuration tasks for Planning and Performance Management Architect have been completed, you must grant other users rights to use Planning and complete additional tasks using the Shared Services User Management Console. Tasks to complete are:

1. Create a project using the User Management Console. Planning can contain many projects and a project contains many applications. See the *Hyperion Security Administration Guide* for more information.
2. Assign roles for Shared Services user management. See the *Hyperion Security Administration Guide* for more information.
3. Assign global roles of Application Creator and Dimension Editor to use Performance Management Architect or Classic Application Administration. See the *Hyperion Security Administration Guide* for more information.
4. Migrate Planning users and groups to Shared Services. To use the new identity attribute available in Shared Services, see the *Hyperion Security Administration Guide*.

Verify Performance Management Architect Installation

Note:

If you are using Classic Application Administration instead of Performance Management Architect, skip this section.

► To verify that you can access Performance Management Architect:

- 1 Ensure that Shared Services and Workspace are running.
- 2 Ensure that IIS is running.
- 3 Start the Dimension server by doing one of the following:
 - From the Services panel, start Hyperion S9 EPM Architect Process Manager.

Note:

Starting Performance Management Architect Process Manager service automatically starts these services: Hyperion S9 EPM Performance Management Architect Engine Manager, Hyperion S9 EPM Performance Management Architect Event Manager, and Hyperion S9 EPM Performance Management Architect Job Manager.

- Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start Dimension Server**.

Note:

If you have difficulty starting the Dimension server, you might need to change the timeout setting. See [“Starting and Stopping Performance Management Architect Dimension Server” on page 67](#).

- 4 Start the Performance Management Architect application server by doing one of the following:
 - From the Services panel, start Hyperion S9 EPM Architect Web ATS5 (for Tomcat); Hyperion S9 EPM Architect Web WLS<version> (for WebLogic); or Hyperion S9 EPM Architect Web WAS<version> (for WebSphere).
 - Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start Performance Management Architect Web**
- 5 Open your Web browser and access Performance Management Architect through Workspace (<http://<Web Server>:<port>/workspace/>) where <Web Server> is the Web server machine hostname and <port> is the Web server listen port; for example, 19000 if using the Apache instance configured with Reporting and Analysis.
- 6 Enter your user name and password and click **Log On**.

Note:

If you have difficulty accessing Performance Management Architect, see *Hyperion Installation and Configuration Troubleshooting Guide*.

- 7 Select **Navigate > Administer > Dimension Library**.
- 8 Follow the procedures in the *Hyperion Enterprise Performance Management Architect Administrator's Guide* to import dimensions and create an application view.

Starting and Stopping Performance Management Architect Dimension Server

You can start and stop the Performance Management Architect Dimension server from the Start menu or through the Services panel.

- To start or stop the Dimension server:

Do one of the following:

- Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start Dimension Server or Stop Dimension Server**.
- From the Services panel, start Hyperion S9 EPM Architect Process Manager.

- To increase the timeout setting for startup of Dimension Server:

If you experience a problem with starting up the service for the Dimension server (Hyperion S9 EPM Architect Process Manager), you can change the timeout setting. The default timeout setting for startup of the Dimension server is 180 seconds.

1. Open the `BPMA_Server_Config.xml` file. This file is located in `%HYPERION_HOME%\BPMA\AppServer\DimensionServer\ServerEngine\bin`.
2. Search for `DimensionServerStartupTimeout` under **Config > ProcessManager** and change the value of the timeout (in seconds).

Starting and Stopping Performance Management Architect Application Server

You can start and stop the Performance Management Architect application server using the Services panel, the Start menu, or a command. The location of the command depends on which Java application server you are using.

- To start or stop the EPM Architect application server:

Do one of the following:

- From the Services panel, start **Hyperion S9 EPM Architect Web <AppServerVersion>**.
- Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start (Stop) Performance Management Architect Web**.
- On the computer hosting your Java application server, locate the start or stop server command.

Table 27 Location Example for StartEPMAWebTier and StopEPMAWebTier Commands

If you are using:	Go to this directory (for example)	Execute This Command
<ul style="list-style-type: none">○ Tomcat 5○ WebLogic 9○ WebSphere 6		Double-click startEPMAWebTier.bat or stopEPMAWebTier.bat
WebLogic 8.1.6	<drive letter>:\Hyperion\ BPMA \AppServer\InstalledApps \WebLogic\<version> \BPMAWebServer\bin	Double-click startEPMAWebTier.bat or stopEPMAWebTier.bat

Starting and Stopping Performance Management Architect Data Synchronizer Server

The Data Synchronizer server must be started to use data movement capabilities of Performance Management Architect. However, it is not needed in order to log into Workspace or verify the Performance Management Architect installation. See the *Hyperion Performance Management Architect Administrator's Guide* for more information about using the Data Synchronization features of Performance Management Architect.

You can start and stop the Performance Management Architect Data Synchronizer server using the Services panel, the Start menu, or a command. The location of the command depends on which Java application server you are using.

- To start or stop the Performance Management Architect Data Synchronizer server:

Do one of the following:

- From the Services panel, start **Hyperion S9 EPM Architect Data Sync <AppServerVersion>**.

- Select **Start > Programs > Hyperion > Foundation Services > Performance Management Architect > Start (Stop) Data Synchronizer**.
- On the computer hosting your Java application server, locate the start or stop server command.

Table 28 Location Example for StartEPMADataSynchronizer and StopEPMADataSynchronizer Commands

If you are using:	Go to this directory (for example)	Execute This Command
<ul style="list-style-type: none"> ○ Tomcat 5 ○ WebLogic 9 ○ WebSphere 6 		Double-click startEPMADataSynchronizer.bat or stopEPMADataSynchronizer.bat
WebLogic 8.1.6	<drive letter>:\Hyperion\ BPMA \AppServer\InstalledApps \WebLogic\<version> \BPMAWebServer\bin	Double-click startEPMADataSynchronizer.bat or stopEPMADataSynchronizer.bat

Verify the Planning Installation

Before you begin, ensure the Shared Services server, Workspace and Essbase servers are all running.

- To verify that you can log on to the Workspace to access Planning:
 - 1 Start the Planning application server. See [“Starting and Stopping Planning Application Server” on page 69](#).
 - 2 Open your Web browser.
 - 3 Access Planning through Workspace (<http://<Web Server>:<port>/workspace/>) where <Web Server> is the Web server machine hostname and <port> is the Web server listen port; for example, 19000 if using the Apache instance configured with Reporting and Analysis.
 - 4 Enter your user name and password and click Log On.
 - 5 Select **Navigate > Applications > Planning**.

Starting and Stopping Planning Application Server

You can start and stop the Planning application server using the Start menu or a command. The location of the command depends on which Java application server you are using.

- To start or stop the Java application server:
 - On the computer hosting your Java application server, locate the start or stop server command.

Table 29 Location Example for StartHyperionPlanning and StopHyperionPlanning Commands

If you are using:	Go to this directory (for example)	Execute This Command
<ul style="list-style-type: none"> ○ Tomcat 5 ○ WebLogic 9 ○ WebSphere 6 		Double-click startHyperionPlanning.sh or stopHyperionPlanning.sh
WebLogic 8.1.6	/vol1/ hyperion/Planning/ AppServer/ InstalledApps/ WebLogic/<version>/ HyperionPlanning	Double-click startHyperionPlanning.sh or stopHyperionPlanning.sh

Upgrading Existing Applications

If you have existing applications, perform these tasks to upgrade the applications to release 9.3.1. There is a separate procedure for releases prior to 9.3.x.

Upgrading Applications to 9.3.1 from a Release Prior to 9.3.x

This procedure assumes that you've already backed up a copy of your HspJSHome.properties file from your prior release and configured your Planning System Database using the Hyperion Configuration Utility. This procedure can be used whether you are using Classic Planning or Performance Management Architect.

1. Copy the HspJSHome.properties file that you backed up before installing Planning 9.3.1 to the same folder that contains the new PlanningSystemDB.properties file. The location is vol1/Hyperion/deployments/<AppServerVersion>/HyperionPlanning/webapps/HyperionPlanning/WEB-INF/classes
2. Run the PropFileMig utility (PropFileMig.cmd) located in vol1/Hyperion/Planning/Bin. This utility copies the information about your servers and applications from the properties file from the previous release (HspJSHome.properties) to the Planning System database. A data source will be created for each application.
3. Launch the Hyperion Configuration Utility. Under Planning, perform the Edit Datasource task for each application you want to upgrade, and enter the current server details, usernames and passwords
4. Restart the Planning application server and log on to Planning using this URL: http://<hostname>:8300/HyperionPlanning/LogOn.jsp.
5. Select the application you want to open from the drop-down list of applications. A message is displayed that the application version needs to be upgraded.
6. Enter your username and password again and select the application. Then click Migrate (Note that the LogOn button changes to Migrate). The application is upgraded to the 9.3.1 release and you are logged on.
7. Register the application in Shared Services:
 - a. Select Administration > Application Settings > Advanced Settings > Shared Services Settings.

- b. Enter the Shared Services URL.
 - c. Click Register Shared Services.
8. Repeat steps 4 through 7 for each application you want to upgrade.
9. To upgrade an application to Performance Management Architect, from Workspace, select Navigate > Administer > Application Upgrade. The Application Upgrade wizard is displayed.

Caution!

In order to run the Application Upgrade wizard, Hyperion recommends that you increase the heap size in the Planning startup script to 1024. For example, add this line to the startup script: `SET JAVA_OPTS=-server -Xms512M -Xmx1024M`.

- a. Review the Welcome screen, then click Next.
 - b. On the Upgrade Summary page, the applications you can upgrade are displayed (this information comes from the Shared Services server). If an application cannot be upgraded, an explanation is provided.

Note:

When you upgrade a single currency application, the Entity member Currency property will be set to the application default property.

- c. On the Select Applications page, add applications to the Applications to Upgrade list. After you select all the applications to upgrade, click Next.
 - d. Review the summary of applications to upgrade. Then click Next to execute the upgrade.
 - e. Click Finish to view the upgrade process in the Jobs Console.
 - f. Open the Application Library to confirm that the application(s) are in Performance Management Architect.
 - g. Navigate to Dimension Library and review the dimensions that were added to Performance Management Architect.
 - h. Open the application.

Note:

All dimensions get added to the EPMA Dimension Library as HP_APP_DIM.

Upgrading Applications to 9.3.1 from Release 9.3.x

Complete these steps to upgrade applications to 9.3.1 from Release 9.3.x

1. Launch the Hyperion Configuration Utility. Under Planning, perform the Configure Database task and choose the Re-use database option to migrate the Planning system database schema to 9.3.1.

2. Update the Planning system database in the relational database (MS SQL Server, Oracle or DB2). In the HSPSYS_APPLICATION table, clear the VERSION value for the target application.
3. Restart the Planning application server and log on to Planning using this URL: `http://<hostname>:8300/HyperionPlanning/LogOn.jsp`
4. Select the application you want to open from the drop-down list of applications. A message is displayed that the application version needs to be upgraded.
5. Enter your username and password again and select the application. Then click Migrate (Note that the LogOn button changes to Migrate). The application is upgraded to the 9.3.1 release and you are logged on.

Installing Smart View, Offline Planning, Planning Adapter, and Reporting and Analysis

Installing Smart View

Smart View enables integration of Office products with Planning, Financial Management, and Financial Reporting information. Smart View is Windows based, and replaces the existing spreadsheet add-ins for Planning and Financial Management. Within Planning, end users can import Planning forms to Excel. Then, users can use Smart View to work with forms online, connected to the Planning server, or offline.

You can access the `SmartView.exe` through a URL: `http://HyperionPlanningView`. While logged in to Workspace select Tools > Install > SmartView.

► To install the Smart View client:

- 1 Double click the `SmartView.exe` file.
- 2 In the installation wizard, click **Next**.
- 3 Install Smart View to the default location, `<drive letter>:\Hyperion\SmartView`, or click **Change** to install to a different location.
- 4 Click **Next**.
- 5 Click **Install**.
- 6 Click **Finish**.

The next time you open Excel, Word, or PowerPoint, a Hyperion menu is added to the menu bar.

- 7 After Smart View is installed, end users must use Smart View Connection Manager to create a connection to Planning.

For information on how to use Smart View, see the *Hyperion Smart View for Office User Guide* or the online help that is installed with Smart View.

Note:

To preserve login and user preference information, uninstalling Smart View does not remove these registry items:

- HKEY_CURRENT_USER\Software\Hyperion Solutions\HyperionSmartViewConnections
- HKEY_CURRENT_USER\Software\Hyperion Solutions\HyperionSmartViewLogin
- HKEY_CURRENT_USER\Software\Hyperion Solutions\HyperionSmartViewPreferences

Installing Offline Planning

Planners can disconnect from the Planning server and work with data forms offline while using comparable online functionality. To work offline, planners retrieve data forms from Planning Web, load them into Smart View, and take the data forms offline. Then they can perform data entry and save their data back to the Planning server. For example, they can adjust data, view instructions, add supporting detail, and create formulas to manipulate data. Users can work offline with their plans and forecasts in any location where an Internet connection may not exist.

The Planning setup program places the Offline installer in: `<drive letter>:\Hyperion\Planning\Bin\SmartView` folder. `Offline.exe` provides Offline to your users on a network or on user's machines. Offline Planning must be installed on a Windows 32-bit machine where Excel is installed.

Caution!

If you used forms offline in a previous release, you must sync forms back to the server before installing Offline Planning Release 9.3.1.

➤ To install Offline Planning on a Windows machine:

- 1 Double click the `Offline.exe` file.
- 2 Review the **Welcome** screen and click **Next**.
- 3 From the list of countries, select the location from which you are installing, and click **Next**.
- 4 Read the license agreement, then select **I AGREE** and click **Next**.
- 5 Click **Next** to accept the default installation directory, or click **Browse** to select another directory, and click **Next**. The default directory is `<Hyperion_Home>:\Hyperion\Offline`.
- 6 Review the summary information and click **Next** to continue the installation, or **Back** to change settings.
- 7 Click **Finish**.

Since Offline Planning Provider terminates when a user without proper access takes a form offline, administrators must give users the following permissions:

- Read and write permissions for the following folders and subfolders: {C:\hyperion\offline\}myanalytics and C:\hyperion\offline\}offlinedata.
- Read and execute permissions for c:\windows\system32\msvcr71.dll.

Installing the DIM Adapter for Planning

After you install and configure Data Integration Management, you can install and configure adapters that enable you to retrieve and write data for Planning and other Hyperion products such as Essbase, Financial Management, or Oracle's Hyperion® Performance Scorecard – System 9.

A Hyperion product and the Data Integration Management adapter for that product can be on different computers. For example, you can install Planning on one computer and DIM Adapter for Planning on another.

Each adapter includes online help that provides instructions for using the adapter.

You must have administrative privileges on any computer where you install a Data Integration Management adapter. A Data Integration Management adapter installer provides two options:

- Typical—Install all adapter components
- Custom—Install the components that you select:
 - Client Plug-in—Enables you to configure source and target definitions for the Hyperion application in Designer.

Client Plug-in should be installed on the same computer as PowerCenter Client.

- Reader and Writer Plug-ins—Enable you to read information from the Hyperion application and write information to it.

Reader and Writer Plug-ins should be installed on the same computer as PowerCenter Server

The installer sets environment and system variables:

- Reader and Writer Plug-ins of DIM Adapter for Planning (Solaris, AIX):

CLASSPATH is updated with the *Installation Directory*/HPConnector/Bin/Resources directory and the *Installation Directory*/HPConnector/Bin/Lib/HPPlugin.jar file.

Note:

When you install the client and server components of any Data Integration Management adapter on one computer, you must install both components in the same location.

➤ To install a Data Integration Management adapter:

1 Take one action from the installation DVD or the directory where you downloaded the adapter installer:

- Windows—Click setupwin32.exe.
- UNIX—Run a program:

- AIX—`setupAix.bin`
 - Solaris—`setupSolaris.bin`
 - Linux—`setupLinux.bin`
 - HP-UX—`setupHP11.bin`
- 2 On the adapter installer **Welcome** screen, click **Next**.
 - 3 Select a country for the installation, and click **Next**.
 - 4 Select **I AGREE**, and click **Next**.
 - 5 Specify the directory in which to install the adapter, and click **Next**.
 - 6 Click **Next** to accept the Hyperion Home directory.
 - 7 Select a setup type, and click **Next**.
 - 8 If you selected the Custom setup option in the preceding step, select components to install, and click **Next**.
 - 9 Verify the installation summary, and click **Next**.

Tip:

You can click Back to change installation choices.

While the installer is running, a progress page is displayed. When the installation is complete, the Configuration Guidelines page is displayed.

Installing Adapters in Silent Mode

When you install a Data Integration Management adapter in silent mode, the installer retrieves the installation properties that are saved in a response file instead of displaying screens where you enter these properties. Silent mode is often used for performing installations remotely. You can create the response file from a template before you perform an installation, or you can create the file during an installation for use in subsequent silent-mode installations.

- To install an adapter in silent mode, run this command:

```
InstallerFile -silent -options ResponseFile
```

where *InstallerFile* is a platform-specific installation program (such as `setupwin32.exe` for an installation on a Windows platform or `setupSolaris.bin` for a Solaris platform) and *ResponseFile* is the property file containing the parameters required for the installation.

Installing Adapters in Console Mode

When you run the installer for an adapter in console mode, you select input from a series of menus that are displayed.

- To install an adapter in console mode, run this command:

```
InstallerFile -console
```

where *InstallerFile* is a platform-specific installation program (such as *setupSolaris.bin* for a Solaris platform).

Configuring Adapters

After installing Data Integration Management adapters, you must configure them on the computers hosting the PowerCenter Server, Client, and Repository Server components of Data Integration Management.

Adapter configuration tasks are described in these topics:

- [“Registering Adapters with a Repository” on page 75](#)
- [“Configuring Hyperion Application Connections” on page 76](#)
- [“Configuring JVM Options” on page 78](#)

You can perform these tasks on Windows computers where PowerCenter Client is installed.

Registering Adapters with a Repository

If you install the Reader and Writer Plug-ins component of a Data Integration Management adapter, which is a server component, you must register the adapter with the repository. This registration is not required if you install only the Client Plug-in component.

- To register a Data Integration Management adapter with a repository:

- 1 **Copy the *HyperionProduct.xml* file installed with the adapter to *Repository Server Installation Directory\bin\Plugin*.**

HyperionProduct.xml locations:

- Planning– *HPConnector\Bin*
- DIM Adapter for Essbase– *HASConnector\Bin*
- DIM Adapter for Financial Management– *HFMConnector\resources*
- DIM Adapter for Performance Scorecard– *HPSCConnector\Bin*

- 2 **Ensure that Data Integration Management Repository Server is running:**
 - a. From the Windows Control Panel, select **Administrative Tools**.
 - b. Select **Services**.
 - c. In the **Services** window, check the status of **Hyperion S9 data Integration Management Repository Server**.
 - d. Unless the status is “Started,” click **Start** (in the upper left of the window).

Note:

Keep the Services window open for the next step.

- 3 Stop Data Integration Management Server, if it is running:
 - a. In the Services window, check the status of Hyperion S9 Data Integration Management Server.
 - b. If the status is “Started,” click **Stop** (in the upper left of the window).
- 4 Connect to the Repository Server host computer:
 - a. Select **Start > Programs > Hyperion System 9 > Data Integration Management > Informatica PowerCenter 7.1.4 - Client > Repository Server Administration Console**.
 - b. In **Repository Server Administration Console**, right-click the name of the Repository Server host computer, and select **Connect**.
 - c. Enter your password for the host computer, and click **OK**.
- 5 Under the Repository Server host computer name, click **Available packages**.
- 6 Right-click **HyperionProduct.xml**, and select **Register**, where *HyperionProduct* is HAS (DIM Adapter for Essbase), HFM (DIM Adapter for Financial Management), or HPS (Oracle's Hyperion® Data Integration Management Adapter for Performance Scorecard).
- 7 Enter the repository administrator user name and password, and click **OK**.

Note:

By default, both the user name and the password are *Administrator* if you are using Informatica native authentication. If you are using Oracle's Hyperion® Shared Services authentication, the default user name and password are *admin* and *password*, respectively.

- 8 When a message that the registration succeeded is displayed, click **OK**.
- 9 Repeat these steps for each adapter to be registered

Note:

For more information, see “Registering and Unregistering Repository Plug-ins” in the Informatica PowerCenter *Repository Guide*.

Configuring Hyperion Application Connections

After you configure an adapter, you must configure an application connection in Workflow Manager before you can extract data from sources or write data into targets. When configuring application connections, you specify attributes that Data Integration Management Server uses to connect to a database during a Data Integration Management session. The application connections that you define in Workflow Manager are saved in Data Integration Management Repository.

- To configure application connections:

- 1 Ensure that Data Integration Management Repository Server is running:
 - a. From the **Control Panel**, select **Administrative Tools**.
 - b. Select **Servers**.

- c. In the **Services** window, check the status of **Hyperion S9 data Integration Management Repository Server**.
 - d. Unless the status is “Started,” click **Start** (in the upper left of the window).
- 2 Start the repository:**
- a. Select **Start > Programs > Hyperion System 9 > Data Integration Management > Informatica PowerCenter 7.1.4 - Client > Repository Server Administration Console**.
 - b. In **Repository Server Administration Console**, right-click the name of the Repository Server host computer and select **Connect**.
 - c. Enter your password for the host computer, and click **OK**.
 - d. In the **Repositories** directory, double-click the repository name.
 - e. Click **Start** (on the left).
- 3 Select **Start > Programs > Hyperion System 9 > Data Integration Management > Informatica PowerCenter 7.1.4 - Client > Workflow Manager**.**
- 4 In **Workflow Manager**, connect to the repository:**
- a. In the **Repository Navigator** panel, double-click the repository name.
 - b. Enter the repository administrator's user name and password, and then click **Connect**.
- 5 Select **Connections > Application**.**
- 6 Click **New**.**
- 7 Select the connection for the adapter that you are configuring, and click **OK**.**
- 8 Enter the requested information, and click **OK**:**

The information requested depends on the Hyperion application. It can include these items:

- **Name**—A name for the connection
- **User Name**—Your user name for the Hyperion application; for example, if you are configuring Hyperion Planning Connection, your user name for Planning.
- **Password**—Your password for the repository; for example, if you are configuring Hyperion Planning Connection, your password for Planning.
- **URL**—The Hyperion product application URL that you want to use
- **Host or ServerHost**—The name of the Hyperion product server host computer; for example, if you are configuring Hyperion Planning Connection, the name of the Planning server host computer
- **Port**—The port number used by the application
See *Installation Start Here* for information about ports.
- **Cluster** —The name of the registered cluster where the application runs

Application Connection Browser lists the new application connection.

Tip:

You can edit or delete an application connection by selecting it in the list in Application Connection Browser and clicking Edit or Delete.

Configuring JVM Options

► To configure JVM options:

1 Start Informatica Server Setup:

- Windows—Select **Start > Programs > Hyperion > Data Integration Management > Informatica PowerCenter 7.1.4 - Server > Informatica Server Setup**.
- UNIX—Run `pmconfig` from the `$DIM_HOME/Server/bin` directory.

Note:

On Solaris, run `./pmconfig` to avoid running the Solaris system command by the same name. The `PM_HOME` environment variable must point to the PowerCenter Server installation directory, or the PowerCenter Server cannot start.

2 With **Configure Informatica Service selected, click **Continue**.**

3 Select the **JVM Options tab.**

4 In **VM Location, enter the fully qualified path to the `jvm.dll` file in your `JAVA_HOME` directory and then click **OK**.**

Uninstalling Adapters

► To uninstall a Data Integration Management adapter:

1 Select **Add/Remove Programs from the Windows Control Panel.**

2 Select the adapter.

3 Click **Change/Remove.**

4 Optional: Remove the adapter plug-in from a repository: .

- a. Open the PowerCenter Repository Server Administration Console.
- b. Select the repository in which the plug-in is registered.
- c. Stop the repository, if it is already running.
- d. Click **Repository > Registered packages** and select the XML file for the adapter:
 - Oracle's Hyperion® Data Integration Management Adapter for Hyperion Enterprise®—HE.xml
 - Oracle's Hyperion® Data Integration Management Adapter for Essbase®—HAS.xml
 - Oracle's Hyperion® Data Integration Management Adapter for Financial Management—HFM.xml

- Oracle's Hyperion® Data Integration Management Adapter for Planning—Planning.xml
 - Oracle's Hyperion® Data Integration Management Adapter for Translation Manager—HTM.xml
- e. Click **Unregister** to remove the plug-in from a repository.
 - f. In **Remove Repository plug-in**, enter the repository user name and password, and click **OK**.

The Output window displays the status of the plug-in uninstallation.

Note:

Repeat step 4 to remove the plug-in from additional repositories.

Uninstalling Adapters in Silent Mode

When you uninstall a Oracle's Hyperion® Data Integration Management adapter in silent mode, the installer retrieves the uninstallation options that are saved in a response file instead of displaying screens where you enter these properties. Silent mode is often used for performing uninstallations remotely. You can create the response file from a template before you perform an uninstallation, or you can create the file during an uninstallation for use in subsequent silent-mode uninstallations.

- To uninstall an adapter in silent mode, run this command:

```
UninstallerFile -silent -options ResponseFile
```

The uninstaller file is in the `Uninstall` subdirectory of the adapter installation directory.

Uninstalling Adapters in Console Mode

When you run the uninstaller for an adapter in console mode, you select input from a series of menus that are displayed.

- To uninstall an adapter in console mode, run this command:

```
UninstallerFile -console
```

The uninstaller file is in the `Uninstall` subdirectory of the adapter installation directory.

Installing Reporting and Analysis

Install Financial Reporting and/or Oracle's Hyperion® Web Analysis – System 9 if you did not install these products when you installed and configured Oracle's Hyperion® Workspace. See the *Hyperion Reporting and Analysis — System 9 Installation Guide*.

Installing and Configuring the Planning Details Analytic Data Model (ADM) Driver

The Planning Details ADM driver enables you to produce production quality reports using Financial Reporting that include Planning supporting detail line items and planning unit annotations. After you install the Planning Details ADM driver according to these instructions, you may choose Planning Details as a data source within Financial Reporting. The Planning Details ADM driver has been optimized as a data source to provide Planning features such as supporting details, planning unit annotations, and metadata filtering. If your report grid will not use these Planning features, for optimal performance, choose Oracle's Hyperion® Essbase® – System 9 as the data source for your report.

- To install the Planning Details ADM driver:
 - 1 Using the Planning set up program, install the ADM Driver on the Financial Reporting server and the Financial Reporting Web server machines. If you choose a Typical install, all Planning components and the ADM driver are installed. In a Custom install, you can just select the ADM Driver option.
 - 2 Install Financial Reporting. You do not need to install the ADM Driver on the Oracle's Hyperion® Financial Reporting – System 9 WIN32 client.



Manually Deploying Planning to a Java Application Server

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About Manual Configuration

During installation of Planning, all the required files are placed in this location:

<PLANNING>/lib for shared library files

<PLANNING>/Deployment for the .ear file

Use the procedures in this appendix to deploy the installed files to your Java application server after you have used the Planning Setup program. For detailed information on deploying to your Java application server, refer to your vendor's administrator's guide.

Configuring Memory Settings

Newly created application server instances use default memory settings, which are often too small to accommodate Hyperion requirements. Optimal settings can be determined only by close monitoring of application server performance under peak load. Use the following settings as a starting point, and then, after careful testing, adjust as needed.

Setting	Suggested Value	Java Argument
Minimum heap	256 MB	-Xms256m
Maximum heap	512 MB	-Xmx512m

For application servers that use Sun's Java Virtual Machine (JVM), the size of the permanent generation heap must be increased. These settings should not be applied if using an application server powered by BEA's JRockit JVM, or IBM's JVM.

Setting	Suggested Value	Java Argument
Minimum permanent generation heap	64 MB	-XX:PermSize=64m
Maximum permanent generation heap	128 MB	-XX:MaxPermSize=128m

Manually Deploying Planning into WebLogic 9.1

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new WebLogic server. Deploying more than one Web application to the same WebLogic server may yield unsuccessful results.

- To manually deploy Planning into WebLogic 9.1:

- 1 **Create a new domain, or use an existing domain**
- 2 **Create a new managed server called `HyperionPlanning`, and specify the listen port as 8300**
- 3 **Copy** `<WLS_DOMAIN>\bin\startWeblogic.sh` **to** `<WLS_DOMAIN>\bin\startHyperionPlanning.sh`
- 4 **Edit** `startHyperionPlanning.sh` **by adding the following to the top of the file:**

```
SERVER_NAME= HyperionPlanning
ADMIN_URL=http://localhost:7001
```
- 5 **Edit** `startHyperionPlanning.sh` **by adding the following after the line:**`${DOMAIN_HOME}/bin/setDomainEnv.sh $*`

by adding

```
HYPERION_HOME=<HYPERION_HOME>
TMPDIR=<TMPDIR>

JAVA_OPTIONS=-Dhyperion.home=${HYPERION_HOME} -
Dweblogic.j2ee.application.tmpDir=${TMPDIR} ${JAVA_OPTIONS}

<OS_LIBRARY_PATH_IDENTIFIER>=${HYPERION_HOME}/common/EssbaseRTC/9.3.1/bin:$
{
HYPERION_HOME}/common/SAP/bin:${OS_LIBRARY_PATH_IDENTIFIER}

CLASSPATH=${HYPERION_HOME}/common/CLS/9.3.1/lib/cls-
9_3_1.jar:${HYPERION_HOME}/common/SAP/lib:${CLASSPATH}
```

Where `<OS_LIBRARY_PATH_IDENTIFIER>` is one of `LD_LIBRARY_PATH`, `LIBPATH`, or `SHLIB_PATH`, depending on your operating system

- 6 **Run** `startHyperionPlanning.sh`
- 7 **Open a command prompt and run the following commands:**

```
PATH=<BEA_JDK_DIR>/bin:${PATH};export PATH
HYPERION_HOME=<HYPERION_HOME>;export HYPERION_HOME

mkdir -p ${HYPERION_HOME}/deployments/staging
cd ${HYPERION_HOME}/deployments/staging
jar -xvf ${HYPERION_HOME}/Planning/AppServer/InstallableApps/Common/
```



```
HyperionPlanning.ear
mkdir -p ${HYPERION_HOME}/deployments/WebLogic9/HyperionPlanning
cd ${HYPERION_HOME}/deployments/WebLogic9/HyperionPlanning
jar -xvf ${HYPERION_HOME}/deployments/staging/HyperionPlanning.war
cp ${HYPERION_HOME}/Planning/config/essbase.properties ./WEB-INF/classes
cp ${HYPERION_HOME}/Planning/config/PlanningSystemDB.properties ./WEB-INF/classes
cp ${HYPERION_HOME}/AnalyticAdministrationServices/HBRServer.properties ./WEB-INF/classes
```

8 Deploy Planning on Weblogic.

- a. Connect to the Weblogic admin console.
- b. Enter the username and password that you created, and click **Log In**.
- c. From the **Change Center** panel, select **Lock and Edit**.
- d. From the **Domain Structure** panel, select **Deployments**.
- e. In the right pane, from **Summary of Deployments > Deployment**, select **Install**.
- f. In the **Install Application Assistant**, browse to `$HYPERION_HOME$/deployments/WebLogic9/HyperionPlanning`, then select `HyperionPlanning.ear`. Then click **Next**.
- g. Once the file loads (this may take a while), from **Choose targetting style**, select **Install this deployment as an application**. Then click **Next**.
- h. Select `HyperionPlanning` as the deployment target.
- i. In **Optional Settings > General**, set the deployment Name to **Planning**. Then, click **Next**.
- j. Select “I will make the deployment accessible from the following location”
Then click **Next**.
- k. Verify the deployment summary and click **Finish**.
- l. After the configuration loads (this may take a while), click **Save** from the **Overview** tab.
- m. After the Settings updated successfully message is displayed, select **Activate Changes** from the **Change Center** panel in the left pane.

Once the deployment is complete, the Lock and Edit button should be activated in the Change Center panel.
- n. From the **Domain structure** panel in the left pane, select **Deployments**.
- o. In the **Summary of Deployments** panel, check that the state of `HyperionPlanning` is “New.”

9 Start the RMIRRegistry process. For example:

```
cd <HYPERION_HOME>/common/RMI
nohup ./HyperionRMIRRegistry &
```

10 Go to Deployments and start Planning by using Start (servicing all requests). Then log out of the console.

11 Restart the HyperionPlanning managed server.

- 12 Once the server is in Running mode, verify the deployment:
 - a. Access Planning directly through `http://<SERVER>:<PORT>/HyperionPlanning/LogOn.jsp`
 - b. Enter your user name and password and click Log On.
 - c. If accessing through Workspace, select **Navigate > Applications > Planning**.
- 13 Complete all post-configuration steps. See [“Installing and Configuring Workspace” on page 65](#).

Manually Deploying Planning into WebLogic 8.1.6

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new WebLogic server. Deploying more than one Web application to the same WebLogic server may yield unsuccessful results.

➤ To deploy and configure Weblogic 8.1.6:

1 Install Planning on a UNIX computer.

2 In WebLogic, create the Planning domain.

- a. Run the file `/bea/weblogic<version>/common/bin/quickstart.sh`.
- b. Select **Create or Extend a Configuration** and create a new WebLogic Configuration, and click **Next**.
- c. Select **Configuration Template > Templates**, highlight **Basic Weblogic Server Domain**, and click **Next**.
- d. Select **Custom** from the **Express or Custom Configuration** option, and click **Next**.
- e. Configure Administration Server:
 - i. For **Name**, enter a server name (Hyperion defaults to HPServer).
 - ii. For the **Listen address**, select the IP address of the machine or enter in the machine name.
 - iii. In **Listen port**, enter an unused port number (Hyperion defaults to 8300).
 - iv. Click **Next**.
- f. **Optional:** Under **Manage Servers, Clusters and Machines Options**, select **Yes** to customize these settings (Hyperion defaults to NO).
- g. Under **Database (JDBC) Options**, click **Next** (Hyperion defaults to NO).
- h. Under **Messaging (JMS) Options**, click **Next** (Hyperion defaults to NO).
- i. In **Configure Administrative Username and Password** field, enter a user name and password and click **Next**.
- j. Under **Configure Server Start Mode and Java SDK**, select **Startup mode as Development Mode or Production Mode**. Accept the default supplied BEA SDK, Sun JDK 1.4.1 or greater, and click **Next**.

- k. Under Create Weblogic Configuration, in **Configuration Name**, enter the domain name (Planning defaults to HyperionPlanning) and click **Create**.

- l. Click **Done**.

- 3 Create a startup script by creating a startup batch file called `startHyperionPlanning.sh` in the `<HyperionPlanningDomain-Location>\bin` folder of your Weblogic installation).**

Example of file content, including required lines:

```
echo off
set
HYSL_USER_SCRIPT=<HyperionPlanningDomain_location>/bin/
setCustomParamsHyperionPlanning.cmd
call ./start/WebLogic.cmd
```

Create the `SetCustomParamsHyperionPlanning.cmd` in `<HyperionPlanningDomain-Location>\bin`

Example of file content, including required lines:

```
set SET JAVA_OPTIONS=Dhyperion.home=vol1/Hyperion -
Dwblogic.j2ee.application.tmpDir=vol1/temp %JAVA_OPTIONS%
SET PRE_PATH=vol1/Hyperion/common/CSS/9.3.1/bin;vol1/Hyperion/common/SAP/
bin;%PRE_PATH%;
SET PRE_CLASSPATH=vol1/Hyperion/common/CLS/9.3.1/lib/cls-9_3_1.jar;vol1/
Hyperion/common/SAP/lib;%PRE_CLASSPATH%;
```

- 4 Using the Configure Database task in the Hyperion Configuration Utility, generate the Planning properties file (`PlanningSystemDB.properties`). For more information, see [Chapter 4, “Configuring and Setting Up Planning.”](#)**
- 5 Copy these three files: `PlanningSystemDB.properties`, `essbase.properties`, and `HBRServer.properties`, to the applications folder under the Planning domain. You can find the `PlanningSystemDB.properties` and `essbase.properties` files in `/vol1/Hyperion/Planning/config` folder. You can find the `HBRServer.properties` file in `/vol1/Hyperion/AnalyticAdministrationServices`. Copy to `<HyperionPlanningDomain_location>/servers/HyperionPlanning/...../war/WEB-INF/lib`.**
- 6 Copy `HyperionPlanning.ear` from the directory in which it is located (for example, `/vol1/hyperion/Planning/AppServer/InstallableApps/Commo`) to the applications folder under the Planning domain.**
- 7 Start the RMIRegistry process. For example:**

```
cd <HYPERION_HOME>/common/RMI
nohup ./HyperionRMIRegistry &
```
- 8 Navigate to the Planning Domain directory where `startHyperionPlanning.sh` was created, and execute the script file.**
- 9 Verify the deployment:**
 - a. Access Planning directly through `http://<SERVER>:<PORT>/HyperionPlanning/LogOn.jsp`.
 - b. Enter your user name and password and click **Log On**.
 - c. If accessing through Workspace, select **Navigate > Applications > Planning**.

- 10 Complete all post-configuration steps. See “Installing and Configuring Workspace” on page 65.

Manually Deploying Planning into WebSphere 6.1 or 6.0.2.11

Caution!

If you are using WebSphere 6.0.x, you must back up the `jdom.jar` file (or `jdom-b9.jar`) installed by WebSphere (located at `/opt/WebSphere/AppServer/java/lib/jdom-b9.jar`) and replace it with the `jdom.jar` that Planning installed in the `/Hyperion/Planning/lib` directory. Until you do so, you cannot deploy a Planning Application View in Performance Management Architect or a Planning application in Classic application administration.

- To deploy and configure WebSphere 6.1 or 6.0.2.11:

1 Create HyperionPlanning Server

Note:

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new WebSphere application server. Deploying more than one Web application to the same WebSphere application server instance may yield unsuccessful results.

2 Begin application deployment.

Note:

These application deployment instructions require access to WebSphere Admin Console. For example, `http://server.example.com:9060/ibm/console`

- a. Create a new or update an existing virtual host:
 - i. In the left frame, select **Environment > Virtual Hosts**.
 - ii. Create or update a Virtual Host by defining a Host Alias for port 8300.
For details, please refer to the WebSphere documentation.
- b. Associate HyperionPlanning server with the virtual host
 - i. Select **Servers > Application Servers > HyperionPlanning > Web Container Settings > Web container**.
 - ii. Select the virtual host from the Default Virtual Host list.
 - iii. Click **OK**, then **Save**.
- c. Associate HyperionPlanning server with Transport Chains:
 - i. Select **Application Servers > HyperionPlanning > Web Container Settings > Web Container Settings > Web container transport chains**.

- ii. Click **New** to create a transport chain.
 1. Enter **HyperionPlanning** for the Transport Chain name. Then click **Next**.
 2. Enter **HyperionPlanning** in the Port name field and 8300 in the Port field. Then click **Next**.
 3. Click **Finish** to confirm creation of the transport chain.
 - iii. Save the configuration to the master configuration.
 - d. Create a new **HyperionPlanning** application
 - i. Select **Applications > Enterprise Applications > HyperionPlanning > Virtual Hosts**.
 - ii. Browse to specify path where `HyperionPlanning.ear` resides and click **Next**. For example: `/vol1/Hyperion/Planning/AppServer/InstallableApps/Common/HyperionPlanning.ear`. Then click **Next**.
 - iii. Specify a name for the application server (for example, `HyperionPlanning`).
 - iv. In **Map modules to servers**, select to **Map the HyperionPlanning module to the HyperionPlanning server**, then click **Next**.
 - v. In **Map Virtual Hosts for Web modules**, select the virtual host you updated or created from the drop-down list. Then select the `HyperionPlanning` application and click **Next**.
 - vi. Review the summary of options and click **Finish** to start deployment.
 - vii. Once deployment is completed, click **Save to Master Configuration**.
- 3 Use the Configure Database task in the Hyperion Configuration Utility to generate the Planning properties file (`PlanningSystemDB.properties`). Copy the following three files:**
`PlanningSystemDB.properties`, `essbase.properties`, and `HBRServer.properties` to `<WAS_PROFILE_DIR>/installedApps/<CELL>/HyperionPlanning.ear/HyperionPlanning.war/WEB-INF/classes`. You can find the `PlanningSystemDB.properties` file in the `config` folder. The `essbase.properties` file can be found in `/vol1/Hyperion/Planning/config`. The `HBRServer.properties` file can be found in `/vol1/Hyperion/AnalyticAdministrationServices`
- 4 Perform these additional steps:**
- a. In **Server Infrastructure**, select **Java and Process Management > Process Definition > Custom Properties**. Then create two new entries:
 - i. `HYPERION_HOME`
 - ii. `(AIX)LIBPATH <HYPERION_HOME>/common/EssbaseRTC/9.3.1/bin:/<HYPERION_HOME>/HyperionPlanning/lib`
 - iii. `(Solaris)LD_LIBRARY_PATH <HYPERION_HOME>/common/EssbaseRTC/9.3.1/bin:/<HYPERION_HOME>/HyperionPlanning/lib`
 - b. Save all the settings in the master configuration.
 - c. Restart the `HyperionPlanning` server.
- 5 Start the RMIRegistry process. For example:**

```
cd <HYPERION_HOME>/common/RMI
```

```
nohup ./HyperionRMIRegistry &
```

6 Verify the deployment:

- a. Run the startup script file.
- b. Access Planning directly through `http://<SERVER>:<PORT>/HyperionPlanning/LogOn.jsp`.
- c. Enter your user name and password and click Log On.
- d. If accessing through Workspace, select **Navigate > Applications > Planning**.

7 Complete all post-configuration steps. See “Installing and Configuring Workspace” on page 65.

Manually Deploying Planning into Oracle 10g (10.1.2.0.2) Application Server for Planning

Planning 9.3.1 supports manual deployment to Oracle Application Server 10g (10.1.2.0.2). Oracle 10g Application Server is supported in English only.

Note:

Note: The operating system user who owns the Oracle Application Server instance should be used to install Planning. If that is not possible, the `<PLANNING_HOME>/AppServer` directory and its sub-directories must permit write access by the operating system user who owns the Oracle Application Server instance. Additionally, `<HYPERION_HOME>`, `<PLANNING_HOME>`, and all subdirectories and files therein must be readable by the operating system user who owns the Oracle Application Server instance.

► To deploy and configure Oracle Application Server 10g for Planning:

- 1 Ensure that you installed Planning as explained in this guide and ensure that Oracle Application Server 10g is installed and running.**
- 2 Log on to the Oracle 10g Application Server Console.**
- 3 Create the OC4J instance named “HyperionPlanning”:**
 - a. On the Oracle Enterprise Manager Application Server Main page, in System Components, click Create OC4J Instance.
 - b. On the Create OC4J Instance page, enter **HyperionPlanning** for OC4J Instance Name.
- 4 Increase the heapsize:**
 - a. On the Oracle Enterprise Manager Application Server Main page, in System Components, select **HyperionPlanning**.
 - b. On the OC4J: Planning page, select **Administration**.
 - c. On the Administration page, select **Server Properties**.

- d. On the **Server Properties** page, in the **Java Options** field in **Command Line Options**, add `-Xmx512m` to the line that begins with `-Xrs -server -Xrs` to set the JVM heap size to 512 megabytes.

Example: `-Xmx512m -Xrs -server -Xrs -Djava.security.policy=/home/oracle/10G/j2ee/HyperionPlanning/config/java2.policy -Djava.awt.headless=true`

- e. Click **Apply** to save the configuration.

5 Configure the system path:

- a. On the **Oracle Enterprise Manager Application Server Main** page, in **System Components**, select **HyperionPlanning**.
- b. On the **OC4J: Planning** page, select **Administration**.
- c. On the **Administration** page, select **Server Properties**.
- d. On the **Server Properties** page, in **Java Options**, in **Command Line Options**, insert `-Djava.library.path=<path>` to the line that begins with `-Xmx512m -Xrs -server -Xrs`.

Example: `-Xmx512m -Xrs -server -Xrs -Djava.library.path=/vol1/hyperion/Planning/lib -Djava.security.policy=/home/oracle/10G/j2ee/HyperionPlanning/config/java2.policy -Djava.awt.headless=true -Djava.xml.parsers.SAXParserFactory=org.apache.xerces.jaxp.SAXParserFactoryImpl`

- e. Click **Apply** to save the configuration.

6 Configure the environment variables:

- a. On the **Oracle Enterprise Manager Application Server Main** page, in **System Components**, select **HyperionPlanning**.
- b. On the **OC4J: Planning** page, select **Administration**.
- c. On the **Administration** page, select **Server Properties**.
- d. In **Environment Variables** click **Add Environment Variable** and add an environment variable named `HYPERION_HOME`; for example, `/vol1/hyperion`.
- e. In **Environment Variables**, click **Add Environment Variable** and add an environment variable:

- Called `LIBPATH` if OC4J is running on AIX.
- Called `LD_LIBRARY_PATH` if OC4J is running on Solaris.

The value should be the path where your Essbase Run Time Client is installed plus the `bin` directory and the path where your Essbase Shared libraries are installed.

Example: `/vol1/hyperion/common/EssbaseRTC/9.3.1/bin:/vol1/hyperion/HyperionPlanning/lib`

- f. Click **Apply** to save the configuration.

7 Deploy the `HyperionPlanning.ear` file by completing the following steps:

- a. On the Oracle Enterprise Manager Main page, in **System Components**, select **HyperionPlanning**.
- b. On the OC4J: Planning page, select **Applications**.
- c. Click **Deploy EAR file**.
- d. Browse to the EAR file.
Example: `/vol1/hyperion/Planning/Deployment/ HyperionPlanning.ear`
- e. On the **Deploy Application** page, in **Application Name**, enter **HyperionPlanning**.
- f. Click **Continue**, then click **Next**.
- g. Click **Next** again, and then click **Deploy**.

8 Assign the port:

- a. On the Oracle Enterprise Manager Application Server Main page, select **Ports**.
- b. Edit the row containing Oracle HTTP Server >Listen > 7778 > 7777-7877 by clicking the pencil icon to the right.
- c. In **Listening Addresses and Ports**, click **Add Another Row**.
- d. In **Listening Port**, enter **8300**.
- e. Click **Apply**.
- f. Click **Yes** to restart the HTTP server.

9 Create a virtual host for HyperionPlanning:

- a. On the Oracle Enterprise Manager Main page, in **System Components**, select **HTTP Server**.
- b. On the OC4J: HTTP_Server page, select **Virtual Hosts**.
- c. On the **Virtual Hosts** page, select **Create**.
- d. For **Virtual Host Type**, select **name-based** and click **Next**.
- e. In **Server Name**, enter your valid DNS server name, for example, `myserver.mydomain.com`.
- f. Optional: you may enter your server alias name in the **Server Alias** field and click **Next**.
- g. Set **Listen on a specific port** to **8300** and click **Next**.
- h. On **Error Log** page, click **Next** to accept default values.
- i. Click **Finish** in the summary page.
- j. Click **Yes** to restart the HTTP server.

10 Copy the Planning properties file (PlanningSystemDB.properties) to your Oracle applib directory:

- a. Using the **Configure Database** task in the Hyperion Configuration Utility, generate the Planning properties file (`PlanningSystemDB.properties`).
- b. Copy the Planning properties file (`PlanningSystemDB.properties`) from the `config` folder to the `applib` directory:

Example: `/home/oracle/10G/j2ee/HyperionPlanning/applib`

- 11 **Copy these two properties files:** `essbase.properties` and `HBRServer.properties`, to your Oracle applib directory. These two properties files may be on another machine. You can find the `essbase.properties` file in `/vol1/Hyperion/Planning/config`. The `HBRServer.properties` file can be found in `/vol1/Hyperion/AnalyticAdministrationServices`
- 12 **Copy the `xercesImpl.jar` file from**

`/vol1/oracle/OraHome1/j2ee/HyperionPlanning/applications/
HyperionPlanning/HyperionPlanning/WEB-INF/lib/to /vol1/oracle/OraHome1/
j2ee/HyperionPlanning/applib` folder.
- 13 **Start the RMIRegistry process. For example:**

`cd <HYPERION_HOME>/common/RMI`

`nohup ./HyperionRMIRegistry &`
- 14 **Restart the HyperionPlanning Instance for Oracle10G.**
 - a. On the Oracle Enterprise Manager Application Server Main page, in System Components, select HyperionPlanning.
 - b. Click Restart.
 - c. Click Yes to proceed.
- 15 **Verify the deployment:**
 - a. Access Planning directly through `http://<SERVER>:<PORT>/HyperionPlanning/LogOn.jsp`.
 - b. Enter your user name and password and click Log On.
 - c. If accessing through Workspace, select **Navigate > Applications > Planning**.
- 16 **Complete all post-configuration steps. See “Installing and Configuring Workspace” on page 65.**

Manually Deploying Planning to Oracle 10g (10.1.3.1) Application Server

Planning 9.3.1 supports manual deployment to Oracle Application Server 10g (10.1.3.1). Oracle 10g Application Server is supported in English only.

Note:

The operating system user who owns the Oracle Application Server instance should be used to install Planning. If that is not possible, the `<PLANNING_HOME>/AppServer` directory and its sub-directories must permit write access by the operating system user who owns the Oracle Application Server instance. Additionally, `<HYPERION_HOME>`, `<PLANNING_HOME>`, and all subdirectories and files therein must be readable by the operating system user who owns the Oracle Application Server instance.

- To deploy and configure Oracle Application Server 10g (10.1.3.1) for Planning:
- 1 Ensure that you installed Planning as explained in this guide and ensure that Oracle Application Server 10g is installed and running.
- 2 Log on to the Oracle 10g Application Server Console.
- 3 Follow the instructions in the *Oracle® Containers for J2EE Configuration and Administration Guide* to create a new OC4J instance called “HyperionPlanning”

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new OC4J instance. Deploying more than one Web application to the same OC4J instance may yield unsuccessful results. Planning does not require modifications to Oracle HTTP Server listen port(s). However, if you wish to modify these ports, it is recommended that you do so before continuing. Refer to the appropriate Oracle Application Server guide for details on changing port numbers.

Note:

OC4J group administrative settings such as environment variables are shared by all group members. The OC4J instance you create for the Web application being deployed should be assigned to a group created specifically for that application. (When an application is deployed to more than one OC4J instance, those instances can be assigned to the same group.) For example, when deploying Shared Services and Workspace, the OC4J instance created for Shared Services should be assigned to a different group than the instance created for Workspace. Refer to the Oracle® Process Manager and Notification Server Administrator's Guide for more information about groups.

- 4 Increase the heapsize:
 - a. On the Oracle Enterprise Manager Application Server Main page, in System Components, select HyperionPlanning.
 - b. On the OC4J: Planning page, select Administration.
 - c. On the Administration page, select Server Properties.
 - d. Under **Command Line Options**, increase the initial and maximum heap size; for example:


```
Maximum heap size 512M
Initial heap size 256M
```
 - e. If Oracle Application Server is running on Windows, Linux, Solaris, or HP-UX, add the following Java options:


```
-XX:PermSize=64m
-XX:MaxPermSize=128m
```
 - f. If Oracle Application Server is running on Solaris 10 for SPARC, add the following Java option as recommended by [Metalink Note: 431167.1](#):


```
-
Djava.nio.channels.spi.SelectorProvider=sun.nio.ch.PollSelectorProvide
r
```

- 5 Configure the environment variables:

- a. In **Environment Variables** click **Add Row** and add an environment variable named `HYPERION_HOME`; for example, `/vol1/hyperion`.
- b. In **Environment Variables**, click **Add Row** and add an environment variable named `PLANNING_HOME`; for example, `/vol1/hyperion/Planning`
- c. In **Environment Variables**, click **Add Row** and add an environment variable:
 - Called `LIBPATH` if OC4J is running on AIX.
 - Called `LD_LIBRARY_PATH` if OC4J is running on Solaris.

The value should be the path where your Essbase Run Time Client is installed plus the `bin` directory and the path where your Essbase Shared libraries are installed.

Example: `/vol1/hyperion/common/EssbaseRTC/9.3.1/bin:/vol1/hyperion/HyperionPlanning/lib`

- d. Click **Apply** to save the configuration, and restart the HyperionPlanning OC4J instance.

6 Deploy the HyperionPlanning.ear file by completing the following steps:

- a. On the Oracle Enterprise Manager Main page, in **System Components**, select **HyperionPlanning**.
- b. On the OC4J: Planning page, select **Applications**.
- c. Click **Deploy**.
- d. Browse to the EAR file.

Example: `/vol1/hyperion/Planning/AppServer/InstallableApps/common/HyperionPlanning.ear`

- e. On the **Deploy Application** page, in **Application Name**, enter **HyperionPlanning**.
- f. Click **Continue** and accept all defaults, then click **Next**.
- g. Click **Next** again, and then click **Deploy**.

7 Copy the Planning properties file (PlanningSystemDB.properties) to your Oracle applib directory:

- a. Using the **Configure Database** task in the Hyperion Configuration Utility, generate the Planning properties file (`PlanningSystemDB.properties`).
- b. Copy the Planning properties file (`PlanningSystemDB.properties`) from the `config` folder to the `applib` directory:

Example: `/home/oracle/10G/j2ee/HyperionPlanning/applib`

8 Copy these two properties files: `essbase.properties` and `HBRServer.properties` files to your Oracle `applib` directory. These properties files could be on another machine. You can find the `essbase.properties` in `<PLANNING_HOME>\config`. You can find the `HBRServer.properties` in `<AAS_HOME>`.

9 Copy the `xercesImpl.jar` file from

`<ORACLE_HOME>/j2ee/HyperionPlanning/applications/HyperionPlanning/HyperionPlanning/WEB-INF/lib/to <ORACLE_HOME>/j2ee/HyperionPlanning/applib` folder.

10 Start the RMIRRegistry process. For example:

```
cd <HYPERION_HOME>/common/RMI
```

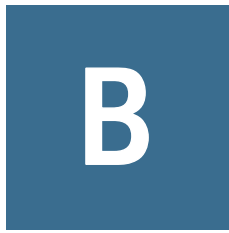
```
nohup ./HyperionRMIRegistry &
```

- 11** On the **Server Topology** page, restart the HyperionPlanning Instance for Oracle10G.
- 12** Verify the deployment:
 - a. Access Planning directly through `http://<SERVER>:<PORT>/HyperionPlanning/LogOn.jsp`.
 - b. Enter your user name and password and click **Log On**.
 - c. If accessing through Workspace, select **Navigate > Applications > Planning**.
- 13** Complete all post-configuration steps. See [“Installing and Configuring Workspace” on page 65](#).

Specifying a Different Location for Planning Properties File

In a manual deployment, you must use the Oracle's Hyperion® Configuration Utility™ to generate the file to a desired location on your hard drive. You will be prompted for it later in the deployment process. This is available for Oracle 10g, Weblogic, WebSphere or Apache Tomcat manual deployments.

- To generate the `PlanningSystemDB.properties` to a specific location:
 - 1** Using the Hyperion Configuration Utility, select the **Configure Database** and the **Deploy to Application Server** tasks in the product selection panel under **Planning**.
 - 2** Select the “Manual” option next to the Java application server you are using. If you are using Oracle 10g, select Apache Tomcat as the Java application server.
 - 3** Enter the location you want to place the `PlanningSystemDB.properties` file. Then click **Next**.



Manually Deploying Performance Management Architect to an Application Server

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About Manual Configuration

The procedures in this appendix should be followed to manually deploy the Performance Management Architect Web Tier server and Data Synchronization server to Oracle, WebLogic, or WebSphere on a Windows machine. First install Performance Management Architect, and then use the Configuration Utility to select the manual option for deployment to an application server.

The required files (`awb.war` and `DataSync.war`) are placed in this location:

`<HYPERION_HOME>\BPMA\AppServer\InstallableApps\configured`

Manually Deploying Performance Management Architect into WebLogic 9.1

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new WebLogic server. Deploying more than one Web application to the same WebLogic server may yield unsuccessful results.

- To manually deploy Performance Management Architect into WebLogic 9.1:
 - 1 Install Performance Management Architect on a Windows computer by following the instructions in this guide.
 - 2 Create a new domain, or use an existing domain.
 - 3 Create a new managed server called EPMA, and specify the listen port as 19091.

4 **Copy** <WLS_DOMAIN>\bin\startWeblogic.cmd to <WLS_DOMAIN>\bin\startEPMA.cmd.

5 **Edit** startEPMA.cmd by adding the following to the top of the file:

```
set SERVER_NAME=EPMA  
  
set ADMIN_URL=http://localhost:7001
```

6 **Run** startEPMA.cmd.

7 **Deploy Performance Management Architect to WebLogic.**

- a. Create these directories: <HYPERION_HOME>\deployments\WebLogic9\awb and <HYPERION_HOME>\deployments\WebLogic9\DataSync.
- b. Extract the awb.war contents to <HYPERION_HOME>\deployments\WebLogic9\awb. Extract the DataSync.war contents to <HYPERION_HOME>\deployments\WebLogic9\DataSync. The awb.war and DataSync.war can be found in <HYPERION_HOME>\BPMA\AppServer\InstallableApps\configured.
- c. Start the WebLogic Administration console by selecting **Start > Programs > BEA Products > User Projects > <EPMA_DOMAIN> > Admin Server Console** or in a Web browser, entering the URL such as `http://<server>:<port>/console` where <server> is the machine where WebLogic is running and <port> is the Performance Management Architect domain port (19091).
- d. Enter the username and password that you created earlier and click **Log In**.
- e. From the **Change Center** panel, select **Lock and Edit**.

Note:

This is required to install and deploy but is not required once the install and deploy is done.

- f. From the left panel of the Administration Console, select **Deployments**.
- g. In the right pane, from **Summary of Deployments > Deployments**, select **Install**.
- h. In the **Install Application Assistant**, browse to <HYPERION_HOME>\deployments\WebLogic9\awb. Then click **Next**.
- i. Once the file loads (this may take a while), from **Choose targeting style**, select **Install this deployment as an application**. Choose EPMA as the target server. Then click **Next**.
- j. Select **I will make the deployment accessible from the following location**. Then browse to the location (<HYPERION_HOME>\deployments\WebLogic9\awb). Then select **Next**.
- k. In **Additional configuration**, select whether you want to see the deployment configuration settings.
- l. Verify the deployment summary and click **Finish**.
- m. After the configuration loads (this may take a while), click **Save** from the **Overview** tab.
- n. After the **Settings updated successfully** message is displayed, select **Activate Changes**.
- o. From the **Domain structure** panel in the left pane, select **Deployments**.
- p. In the **Summary of Deployments** panel, check that the state is "Prepared."
- q. Select the application. Then select **Start > Servicing all requests**.

- r. In **Start Deployments**, select **Yes**.
- s. In the **Summary of Deployments** panel, check that the state is “Active.”
- 8 The application is ready to launch. Test by accessing the URL: `http://<weblogic server>:<port>/awb` where `<weblogic server>` is the WebLogic server machine hostname and `<port>` is the WebLogic server listen port, for example 19091.
- 9 Repeat these steps in order to deploy Performance Management Architect Data Synchronization server to WebLogic, substituting awb with DataSync as needed.
- 10 Complete all post-configuration steps. See [Chapter 6, “Post Configuration Tasks.”](#)

Manually Deploying Performance Management Architect into WebLogic 8.1.6

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new WebLogic server. Deploying more than one Web application to the same WebLogic server may yield unsuccessful results.

- To manually deploy and configure Performance Management Architect into WebLogic 8.1.6:
 - 1 Install Performance Management Architect on a Windows computer by following the instructions in this guide.
 - 2 In WebLogic, create the Performance Management Architect domain by using the WebLogic Configuration Wizard:
 - a. Run `config.cmd` from this directory: `<drive letter>:\<BEA_HOME>\common\bin`.
 - b. Select **Create a new WebLogic domain** and click **Next**.
 - c. Select **Configuration Template > Templates**, highlight **Basic Weblogic Server Domain**, and click **Next**.
 - d. Select **Custom** from the **Express or Custom Configuration** option, and click **Next**.
 - e. In **Configure Administration Server**:
 - i. For **Name**, enter a server name (Hyperion defaults to `BPMAServer`).
 - ii. For the **Listen address**, select `localhost`.
 - iii. In **Listen port**, enter an unused port number (Defaults to 19091 for AWB or 19101 for DataSync).
 - iv. If you want to enable SSL, select **Configure SSL**.
 - v. Click **Next**.
 - f. In **Configure Managed Servers, Clusters and Machines Options**, click **Next**.
 - g. In **Database (JDBC) Options**, click **Next**.
 - h. In **Messaging (JMS) Options**, click **Next**.
 - i. In **Configure Administrative Username and Password**, enter a user name, password and confirm the password. Then click **Next**.

- j. In **Configure Windows Options**, click **Next**.
 - k. In **Build Start Menu Entries**, enter a name and argument. For example, **EPMArchitect**, then click **Next**.
 - l. Under **Configure Server Start Mode and Java SDK**, select **Production Mode**.
 - m. Under **Create Weblogic Configuration**:
 - i. Click **Browse** to identify the folder in which to create the Performance Management Architect domain.
 - ii. In **Configuration Name**, enter the domain name (Performance Management Architect defaults to **BPMADomain**)
 - iii. Click **Create**.
 - n. Once Domain creation is successful, select **Start Admin Server**, and click **Done**. This launches the Performance Management Architect domain server created in WebLogic.
- 3 In the Deploying to an Application Server task in the Configuration Utility, select your Web application server and the Manual option.**
- 4 Deploy Performance Management Architect to Weblogic.**
- a. Extract the **awb.war** contents from **<HYPERION_HOME>\BPMA\AppServer\InstallableApps** to **<HYPERION_HOME>\deployments\WebLogic9\BPMAWebTier\awb**.
 - b. Start the WebLogic server you just created. For example, **<WL_HOME>\user_projects\domains\<USER_DOMAIN>\startWebLogic.cmd** or by selecting **Start > Programs > BEA WebLogic Platform 8.1**.
 - c. Enter the username and password that you created earlier and click **Log In**.
 - d. From the left panel of the Administration Console, select **Deployments > Web Applications Modules**.
 - e. In the right pane, select **Deploy a new Web Application Module**.
 - f. Browse to select the location of the exploded war file.
 - g. Select **Target Module**.
 - h. Review the choices.
 - i. Under **Identity**, enter a name for the application (for example, **bpma**).
 - j. Select **Deploy**.
 - k. Verify the deployment status by waiting until it displays **Available**. The application is now ready.
- 5 Repeat these steps in order to deploy EPM Architect Data Synchronization server to WebLogic.**
- 6 Complete all post-configuration steps. See [Chapter 6, "Post Configuration Tasks."](#)**

Manually Deploying Performance Management Architect into WebSphere 6.1 or 6.0.2.11

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new WebSphere application server. Deploying more than one Web application to the same WebSphere application server instance may yield unsuccessful results.

➤ To manually deploy Performance Management Architect into WebSphere 6.1 or 6.0.2.11:

- 1 Install Performance Management Architect on a Windows computer by following the instructions in this guide.
- 2 Create a server called EPMA.
- 3 Create a virtual host by accessing the WebSphere Admin Console.
 - a. Select **Environment > Virtual Hosts > New** and specify a name for the virtual host (for example, EPMAVirtualHost).
 - b. Click **Apply**, **OK**, and **Save**.
 - c. In the **Additional Properties** section, select **Host Aliases**.
 - i. On the **Host Aliases** page, click **New**.
 - ii. Specify a hostname or IP address of your server in **Host Name** or enter ***** to allow listening on all IP addresses for the machine.
 - iii. Specify the HTTP port that client machines will use to access Performance Management Architect (for example, 19091 for EPM Architect Web Tier and 19101 for Data Synchronizer).
 - iv. Click **Apply**, **OK**, and **Save**.
- 4 Associate the EPMA server with Transport Chains:
 - a. Select **Application Servers > EPMArchitect > Web Container Settings > Web Container Settings > Web container transport chains**.
 - b. Click **New** to create a transport chain.
 - i. Enter **EPM Architect** for the Transport Chain name. Then click **Next**.
 - ii. Enter **EPM Architect** in the Port name field and 19091 in the Port field. Then click **Next**.

Note:

For EPMA Data Synchronizer server, enter EPMA Data Synchronizer for the Transport Chain name and Port name, and enter 19101 in the Port field.

 - iii. Click **Finish** to confirm creation of the transport chain.
- c. Save the configuration to the master configuration.
- 5 Launch the Hyperion Configuration Utility.
- 6 In the **Deploying to an Application Server** task in the Configuration Utility, select your Web application server and the **Manual** option.

7 Deploy Performance Management Architect.

- a. From the WebSphere Admin console, select **Applications > Install New Application**.
 - b. Enter the full server path to the awb.war file (<HYPERION_HOME>\BPMA\AppServer\InstallableApps\configured\awb.war).
 - c. Select **Generate Default Bindings**.
 - d. Select **do not override existing bindings**.
 - e. Select **do not user default virtual host name for Web modules**. Then click **Next**.
 - f. Click **Continue** to acknowledge application security warnings.
 - g. Specify a name for the Web application (for example: awb)
 - h. Map the available modules to the EPMA Server.
 - i. Select **Apply**, then select **Next**.
 - j. In **Map Virtual Hosts for Web modules**, select EPMAVirtualHost from the drop-down list. Then select the check box for the Web module awb.
 - k. Verify the summary, then click **Finish** to start the deployment. Due to the size of the Performance Management Architect application, this may take several minutes to complete. Do not interrupt the deployment process.
 - l. When the deployment is successful, select **Save to Master Configuration**.
 - m. Select **Save**.
 - n. Restart the application server.
- 8 Repeat these steps for the EPM Architect Data Synchronization server.
- 9 Complete all post-configuration steps. See [Chapter 6, "Post Configuration Tasks."](#)

Manually Deploying Performance Management Architect into Oracle 10g (10.1.2.0.2)

Note:

Oracle 10g Application Server is supported in English only. To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new OC4J instance. Deploying more than one Web application to the same OC4J instance may yield unsuccessful results.

- To deploy and configure Oracle Application Server 10g (10.1.2.0.2) for Performance Management Architect:
 - 1 Install Performance Management Architect on a Windows computer by following the instructions in this guide.
 - 2 Make sure that Oracle Application Server 10g (10.1.2.0.2) is installed and running.

- 3 Log into the application server by opening a Web browser, setting the URL to `http://<server>:<port>`, and specifying the username and password that you created during the installation of Oracle.

Note:

The default login ID for a new OC4J instance is `ias_admin`. The password is specified during the Oracle 10g installation. Contact your Oracle Administrator for information.

- 4 Log on to the Oracle 10g Application Server Console.
- 5 Create the OC4J instance named **EPMA**:
 - a. On the Oracle Enterprise Manager Application Server Main page, in **System Components**, click **Create OC4J Instance**.
 - b. On the **Create OC4J Instance** page, enter **EPMA** for OC4J Instance Name.
- 6 Change the OC4J instance settings:
 - a. On the OC4J: EPMA page, select **Administration**.
 - b. On the Administration page, select **Server Properties**.
 - c. Add the `HYPERION_HOME` system parameter: From the Administration page, under **Java Command Line Options**, add the following line: `-Dhyperion.home=<drive letter>:\Hyperion` where `<drive letter>:\Hyperion` is the actual path for `%Hyperion_Home%`.
 - d. Change the java options by appending the following lines:

```
-Djavax.xml.parsers.DocumentBuilderFactory=org.apache.xerces.jaxp.DocumentBuilderFactoryImpl
-Djavax.xml.parsers.SAXParserFactory=org.apache.xerces.jaxp.SAXParserFactoryImpl
-Djavax.xml.stream.XMLOutputFactory=com.ctc.wstx.stax.WstxOutputFactory
-Djavax.xml.stream.XMLInputFactory=com.ctc.wstx.stax.WstxInputFactory
```
- 7 Add `xercesImpl.jar` to the classpath by copying the `xercesImpl.jar` file from `%HYPERION_HOME%\common\XML\JAXP\1.2.2\` to `%OAS_HOME%\j2ee\EPMA\applib` directory.
- 8 Deploy the .war file on Oracle Application Server:
 - a. On the OC4J: EPMA page, select **Applications**.
 - b. Click **Deploy WAR file**.
 - c. In **Web Application**, enter location of the WAR file. For example: `<drive letter>:\Hyperion\BPMA\AppServer\InstallableApps\configured\awb.war`
 - d. In **Application Name**, enter **EPMA**.
 - e. In **Map to URL**, enter `/awb`.
 - f. Click **Deploy**.
 - g. Repeat these steps for Data Synchronization server.

- 9 Copy `wstx-lgpl-3.0.0.jar` and `jsr173_1.0_api.jar` from `%OAS_HOME%\j2ee\awb\WEB-INF\lib` directory to the OC4J instance library (`%OAS_HOME%\j2ee\applib`) directory.
- 10 Complete all post-configuration steps. See [Chapter 6, “Post Configuration Tasks.”](#)

Manually Deploying Performance Management Architect into Oracle 10g (10.1.3.1)

Note:

Oracle 10g Application Server is supported in English only.

- To deploy and configure Oracle Application Server 10g (10.1.3.1) for Performance Management Architect:

- 1 Install Oracle's Enterprise Performance Management Architect on a Windows computer by following the instructions in this guide.
- 2 Make sure that Oracle Application Server 10g (10.1.3.1) is installed and running.
- 3 Log on to the Oracle 10g Application Server Console.
- 4 Create the OC4J instance named **EPMA**:

To prevent the Web application being deployed from inheriting unwanted runtime settings, you must create and use a new OC4J instance. Deploying more than one Web application to the same OC4J instance may yield unsuccessful results. Oracle's Hyperion® Financial Management – System 9 does not require modifications to Oracle HTTP Server listen port(s). However, if you wish to modify these ports, it is recommended that you do so before continuing. Refer to the appropriate Oracle® Application Server guide for details on changing port numbers.

- a. On the Oracle Enterprise Manager Application Server Main page, in System Components, click Create OC4J Instance.
- b. On the Create OC4J Instance page, enter EPMA for OC4J Instance Name.

Note:

OC4J group administrative settings such as environment variables are shared by all group members. The OC4J instance you create for the Web application being deployed should be assigned to a group created specifically for that application. (When an application is deployed to more than one OC4J instance, those instances can be assigned to the same group.) For example, when deploying Shared Services and Workspace, the OC4J instance created for Shared Services should be assigned to a different group than the instance created for Workspace. Refer to the *Oracle® Process Manager and Notification Server Administrator's Guide* for more information about groups.

- c. Click Deploy.
- 5 Change the OC4J instance settings:

- a. On the OC4J: EPMA page, select **Administration**.
 - b. Select **Shared Libraries Task**.
 - i. Click **Create**.
 - ii. Enter `apache.xerces.xml` for the Shared Library name.
 - iii. Enter `2.0.1` for Shared Library Version.
 - iv. Click **Next**.
 - v. Click **Add**.
 - vi. Select the location of the file — either local host, or on the server where Application Server Control is running. The file is on the machine where the EPMA OC4J instance is running (for example, the machine where you installed EPMA).
 - vii. Enter the location of the `xercesImpl.jar`: `<drive letter>:\Hyperion\common\XML\JAXP\1.2.2\xercesImpl.jar`.
 - viii. Click **Continue**, then click **Finish**.
 - c. Add the `hyperion.home` system parameter.
 - i. On the Administration page, select **Server Properties**.
 - ii. Click **Add Another Row** in the **Start Parameters** section.
 - iii. In Start-parameters: Java Options, add the following parameters:–
`Dhyperion.home=<drive letter>:\Hyperion` where `<drive letter>:`
`\Hyperion` is the actual path for `%HYPERION_HOME%`
 - d. Change the `wstx` parser settings:
 - i. On the Administration page, select **Server Properties**.
 - ii. Click **Add Another Row** in the **Start Parameters** section.
 - iii. In Start-parameters: Java Options, add the following parameters:


```
-Djavax.xml.stream.XMLOutputFactory=com.ctc.wstx.stax.WstxOutputFactory
-Djavax.xml.stream.XMLInputFactory=com.ctc.wstx.stax.WstxInputFactory
```
 - e. Change the `xslt` transformer factory settings:
 - i. On the Administration page, select **Server Properties**.
 - ii. Click **Add Another Row** in the **Start Parameters** section.
 - iii. In Start-parameters: Java Options, add the following parameters:


```
-Djavax.xml.transform.TransformerFactory=com.sun.org.apache.xalan.internal.xsltc.trax.TransformerFactoryImpl
```
- 6** Increase the initial and maximum heap size for the OC4J instance; for example:
- Maximum heap size: 256 M
 - Initial heap size: 128 M
- 7** If Oracle Application Server is running on Windows, Linux, Solaris, or HP-UX, add these Java options:

- -XX:PermSize=64m
- -XX:MaxPermSize=128m

8 Deploy the .war file on Oracle Application Server:

- Click **Apply**, then restart the OC4J instance.
- On the OC4J: EPMA page, select **Applications**.
- Click **Deploy**.
- Select **Archive is already present on the server where Application Server is running**.
- Enter location of the WAR file. For example: `<drive letter>:\Hyperion\BPMA\AppServer\InstallableApps\configured\awb.war`
- Leave **Automatically create a new deployment plan** default option selected.
- Click **Next**.
- On the **Deploy Application** page, in **Application Name**, enter **EPMA**.
- Leave default parent application and default web site for binding.
- Click **Next**.
- Select **Configure Class Loading** deployment task.
- Check **Import for apache.xerces.xml into the application**.
- Remove `oracle.xml` from the Shared Libraries.
- Click **OK**, then click **Deploy**.
- Repeat these steps for Data Synchronization server using the following information:
 - Application Name: DataSync
 - Name of the war file: DataSync.war
 - Location of the war file: `\Hyperion\products\Foundation\BPMA\AppServer\InstallableApps\configured`

9 Copy `wstx-lgpl-3.0.0.jar` and `jsr173_1.0_api.jar` from `<ORACLE_HOME>\j2ee\EPMA\awb\WEB-INF\lib` directory to the OC4J instance library (`<ORACLE_HOME>\j2ee\applib`) directory.

10 Click **Apply, then restart the OC4J instance.**

11 Complete all post-configuration steps. See [Chapter 6, "Post Configuration Tasks."](#)



Additional Information

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Setting Up Planning on Multiple Servers

Planning enables you to use multiple servers for the same application. This improves performance and provides fail-over capability for Planning.

To deploy using multiple servers, you must calculate the number of servers that you need, and then designate one server as the primary server and the others as secondary servers.

- To set up the primary and secondary servers:
 - 1 Perform a full installation and configuration of Planning on the primary server by going through the entire configuration process, which includes the procedure for generating the Planning properties file using the Configure Database task in the Configuration Utility.
 - 2 Perform the same installation and configuration process on your secondary servers, making sure to choose Planning Web Server component for any secondary server.

Note:

Make sure you select Reuse existing tables when prompted during the Configure a Database task in the Configuration utility.

Setting Up Planning Using Clustering

These procedures contain the steps for setting up Planning in a cluster if you are using a hardware load balancer, which supports session persistence, or if you are setting up a cluster using a software load balancer (Proxy plug-in).

Using a Hardware Load Balancer

➤ To set up a cluster using a hardware load balancer:

- 1 Install Planning on each node (host) using the installation instructions in this guide. These instructions are not specific to clustering, but they explain how to install Planning.
- 2 Install the Java application server on each node (host).
- 3 Deploy Planning to each node (host). From your Java application server's administrator console, manually deploy the `HyperionPlanning.ear` file to each node (host). The `HyperionPlanning.ear` file can be found in the `AppServer` directory. By default, it is in `<drive letter>:\Hyperion\Planning\AppServer\InstallableApps\Common`.
- 4 Manually copy the Planning properties file (`PlanningSystemDB.properties`) to each node. The location of the `PlanningSystemDB.properties` file differs depending on your Java application server, as shown in this table:

Java application server	Location of <code>PlanningSystemDB.properties</code> file
<ul style="list-style-type: none">• Tomcat 5• WebSphere 6• WebLogic 9	<code><drive letter>:\Hyperion\Planning\deployments\<AppServerVersion>\HyperionPlanning\webapps\HyperionPlanning\Web-Inf\classes</code>
WebLogic 8.1.6	<code><drive letter>:\Hyperion\Planning\AppServer\InstalledApps\Weblogic\<version>HyperionPlanning\applications</code>

- 5 Add the host name (IP address) into the load balancer's host list.

Using a Software Load Balancer (Proxy Plug-In)

To set up a software load balancer (Proxy Plug-In), you must follow your Java application server vendor's documentation. (Links are provided to that documentation in the table.)

➤ To set up a cluster:

- 1 Install Planning using the instructions in this guide. These instructions are not specific to clustering, but they explain how to install Planning.
- 2 Create a cluster using the cluster setting documentation provided by your Java application server vendor.

Java application server	Location of vendor's cluster setting guide
Apache Tomcat 5.0.28	http://jakarta.apache.org/tomcat/tomcat-4.1-doc/RUNNING.txt Scroll down to 4) Advanced Configuration - Multiple Tomcat 4 Instances.
WebSphere 6	http://www.redbooks.ibm.com/redpieces/pdfs/sg246198.pdf
WebLogic 8.1.6	http://e-docs.bea.com/wls/docs81/cluster/index.html

- 3 From your Java application server's administrator console, manually deploy the `HyperionPlanning.ear` file to each node in the cluster. The `HyperionPlanning.ear` file can be

found in the `deployments` directory. By default, it is under `<drive letter>:\Hyperion\Planning\Deployment`.

Note:

Consult your Java application server vendor's documentation for additional recommendations on deploying to nodes in a cluster.

Upgrading Considerations

If you are upgrading from a previous version and have already set up clustering, complete these tasks:

1. Upgrade to Planning Release 9.3.1.
2. Redeploy the `HyperionPlanning.ear` file by uninstalling and then reinstalling the `HyperionPlanning.ear` file using your Java application server administrator console. This ensures that the new version of Planning is loaded in each node.

Using Windows Terminal Services with Planning

Planning 9.3.1 supports use of Windows Terminal Services to enable remote use of Planning, such as use of the Smart View.

This procedure assumes that an IT administrator has set up and enabled Windows Terminal Services and Terminal Services Client. For more information, see Microsoft Windows documentation.

Note:

You need additional memory to run Windows Terminal Services. For example, to run the Smart View, you need 50 MB for each user.

Using Windows Terminal Services Client

This procedure is for remote users who want to use Windows Terminal Services to access Oracle's Hyperion® Planning – System 9.

- To use Windows Terminal Services with Planning:
 - 1 Select **Start > Programs > Terminal Services Client > Terminal Services Client**.
 - 2 In the Server text box, enter the server name.
 - 3 Accept the remaining defaults.
 - 4 Click **Connect**.
 - 5 Log on using your Windows username and password.
 - 6 Open Oracle's Hyperion® Smart View for Office.

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