Oracle® Enterprise Performance Management System

Lifecycle Management Guide
Release 11.1.2.2
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# Contents

**Documentation Accessibility** .......................................................... 11

**Chapter 1. About Lifecycle Management** .................................................. 13
   Lifecycle Management and Migration .................................................. 13
   Lifecycle Management Features ..................................................... 14
   Lifecycle Management Components ............................................. 14
   EPM System Products and Components That Support Lifecycle Management ............. 15

**Chapter 2. Getting Started With Lifecycle Management** ................................. 17
   Lifecycle Management Requirements ................................................ 17
      Prerequisites to Using ............................................................ 17
      Source and Destination Considerations ........................................ 18
      File System Considerations ..................................................... 18
      Applications and Application Groups ........................................... 18
      Availability of the EPM System Environment During Lifecycle Management Migration ........................................................ 18
      Other Important Points ....................................................... 19
   Installing Lifecycle Management ...................................................... 19
   Configuring Lifecycle Management for Shared Services High Availability ............. 20
   Quick Start to Lifecycle Management ............................................. 20
   Backup and Recovery .............................................................. 21
   Security ............................................................................. 22

**Chapter 3. Lifecycle Management Use Cases** ........................................... 23
   Shared Services Use Cases ............................................................... 23
      Native Directory (Security) Migrations and Bulk Security Updates ............... 23
      Migrating Taskflows .................................................................. 23
      Editing Shared Services Registry Data ............................................. 24
      Migrating Provisioning Artifacts for a Specific EPM System Application ............ 24
      Migrating with the LCM Designer Role .......................................... 25
   Artifact Migration Use Cases ......................................................... 27
      Application Migrations with Cross-Product Artifact Dependencies ................ 27
      Exporting and Importing Artifacts for Editing Purposes ......................... 27
Chapter 4. Shared Services Console ..................................................... 31
   Lifecycle Management and Shared Services Console Integration ................. 31
   Launching Shared Services Console .............................................. 31
   Launching Shared Services Console From a URL ................................ 31
   Launching Shared Services Console from EPM Workspace ....................... 32
   Overview of Shared Services Console .......................................... 33

Chapter 5. Working with Applications and Application Groups .................... 35
   Overview ................................................................................ 35
   Working with Application Groups ............................................. 35
      Creating Application Groups ................................................. 36
      Modifying Application Group Properties ................................ 36
      Deleting Application Groups ............................................... 37
   Managing Applications .......................................................... 37
      Moving Applications .......................................................... 38
      Deleting Multiple Applications .......................................... 38
      Deleting an Application ..................................................... 39

Chapter 6. Working With Lifecycle Management and Shared Services Console .... 41
   Viewing Artifacts ................................................................. 41
   Searching Artifacts ............................................................... 42
   Migrating Artifacts ............................................................... 43
      Exporting to the File System .................................................. 43
      Importing from the File System ............................................. 45
      Exporting and Importing Individual Artifacts for Editing ..................... 46
      Migrating Native Directory (Security) ....................................... 47
   Editing Shared Services Registry Data .......................................... 48
      Viewing Shared Services Registry Data .................................... 49
      Exporting Shared Services Registry Data .................................. 50
      Editing Shared Services Registry Data .................................... 50
      Importing Shared Services Registry Data .................................. 50
   Editing Migration Properties .................................................... 51
   Lifecycle Management Reports .................................................. 52
      Migration Status Reports ..................................................... 53
      Artifact Reports ............................................................... 54
Financial Close Management Migration Considerations ...................................... 98
Financial Close Management Application Migrations and Cross-Product Artifact
Dependencies ........................................................................................................ 99
Migration Export and Import Options ............................................................... 99
  Migration Export Options .................................................................................. 99
  Migration Import Options .................................................................................. 99
Sample Migration Definition Files ...................................................................... 99
Lifecycle Management Log Files ........................................................................ 100

Appendix F. Financial Management and Lifecycle Management ....................... 101
  About Financial Management Artifacts .......................................................... 101
  Financial Management Roles Requirement .................................................... 102
  Financial Management Migration Prerequisites .............................................. 102
    Financial Management Classic Application Migrations ................................ 102
    Financial Management Performance Management Architect Application
    Migrations ......................................................................................................... 102
  Financial Management Artifact Listing ......................................................... 103
    About the Artifact Listing ............................................................................... 103
    Security Artifacts .......................................................................................... 104
    Dimensions Artifacts ..................................................................................... 104
    Phased Submission Artifacts .......................................................................... 105
    Rules Artifacts ............................................................................................... 106
    Documents Artifacts ....................................................................................... 106
    Forms Artifacts .............................................................................................. 107
    InterCompany Artifacts .................................................................................. 107
    Journals Artifacts ........................................................................................... 108
    Member Lists Artifacts .................................................................................... 108
  Financial Management Migration Considerations .......................................... 108
  Financial Management Application Migrations and Cross-Product Artifact
  Dependencies ....................................................................................................... 109
  Migration Export and Import Options .............................................................. 109
    Migration Export Options ............................................................................... 109
    Migration Import Options ............................................................................... 109
  Sample Migration Definition Files ................................................................... 110
  Lifecycle Management Log Files ....................................................................... 111

Appendix G. Performance Management Architect and Lifecycle Management ........ 113
  About Performance Management Architect Artifacts ....................................... 113
  Performance Management Architect Roles Requirement ................................. 113
  Performance Management Architect Migration Prerequisites ........................... 114
Plan Type Artifacts ................................................ 136
Security Artifacts .................................................. 137
Planning Migration Considerations ....................................... 138
Planning Application Migrations and Cross-Product Artifact Dependencies .......... 138
Migration Export and Import Options ..................................... 139
Sample Migration Definition Files ........................................ 139
Lifecycle Management Log Files ........................................... 140

Appendix J. Profitability and Cost Management and Lifecycle Management ................................. 141
About Profitability and Cost Management Artifacts ........................... 141
Profitability and Cost Management Roles Requirement ......................... 142
Profitability and Cost Management Migration Prerequisites ..................... 143
Profitability and Cost Management Artifact Listing ............................ 143
About the Artifact Listing ........................................... 143
Standard Profitability and Cost Management Model Artifacts ................. 144
Detailed Profitability and Cost Management Model Artifacts .................. 145
Profitability and Cost Management Migrations and Cross-Product Artifact Dependencies ..................................... 147
Migration Export and Import Options ..................................... 147
Migration Export Options ........................................... 147
Migration Import Options ........................................... 148
Sample Migration Definition Files ........................................ 148
Lifecycle Management Log Files ........................................... 149

Appendix K. Reporting and Analysis and Lifecycle Management ............................................... 151
About Reporting and Analysis Artifacts .................................... 151
Reporting and Analysis Roles Requirement .................................. 151
Reporting and Analysis Migration Prerequisites .............................. 152
Configuring the Production Reporting Job Service Properties on the Destination Application ..................................... 152
Creating Interactive Reporting Data Access Service Data Sources in the Destination Application ..................................... 153
Reporting and Analysis Artifact Listing ..................................... 153
About the Artifact Listing ........................................... 153
Physical Resources Artifacts .......................................... 154
Security Artifacts .................................................. 154
Schedule Objects Artifacts .......................................... 154
Product Preferences Artifacts .......................................... 155
Repository Objects Artifacts .......................................... 156
Admin Options Artifacts ........................................... 160
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About Lifecycle Management

In This Chapter

- Lifecycle Management and Migration ................................................................. 13
- EPM System Products and Components That Support Lifecycle Management .......... 15

Note: This chapter provides an overview of the Oracle Hyperion Enterprise Performance Management System Lifecycle Management product. Before you start to use Lifecycle Management, make sure to read “Lifecycle Management Requirements” on page 17.

Lifecycle Management and Migration

Subtopics

- Lifecycle Management Features
- Lifecycle Management Components

Lifecycle Management provides a consistent way for Oracle Enterprise Performance Management System products to migrate an application, a repository, or individual artifacts across product environments and operating systems.

Note: A migration differs from an upgrade. An upgrade replaces an earlier software release with a current release or one product with another. Migration copies all or part of an application instance from one operating environment to another; for example, it copies an application from development to testing or from testing to production.

Artifacts are individual application or repository items; for example, scripts, Web and data forms, rules files, documents, financial reports, and so forth. The application and repository artifacts are organized into categories by product.

The Lifecycle Management interface is integrated with Oracle Hyperion Shared Services Console. Generally, the Lifecycle Management interface in Shared Services Console is consistent for all EPM System products that support Lifecycle Management. However, EPM System products display different artifact listings and export and import options in the Lifecycle Management interface. For a listing of artifacts and export and import options by product, see the appendixes at the end of this guide.
Lifecycle Management Features

Lifecycle Management provides these features:

- Viewing applications and directories
- Searching for artifacts
- Migrating to and from the file system
- Viewing selected artifacts
- Auditing migrations
- Viewing the status of migrations
- Importing and exporting individual artifacts for quick changes on the file system
- Migrating complete application suites
  - You can migrate complete Oracle Hyperion Financial Close Management or Oracle Hyperion Planning suites by selecting all the related artifacts at once and migrating them.
- Migrating multiple applications
  - You can use Lifecycle Management to migrate multiple classic Oracle Essbase, Planning, or Oracle Hyperion Financial Management applications using a single migration definition.

Lifecycle Management Components

Lifecycle Management consists of these components:

- **LCM Administrator Role**—Oracle Hyperion Shared Services user role that performs Lifecycle Management tasks. The LCM Administrator can use Lifecycle Management to view Shared Services artifacts in the Foundation application group or migrate an application, a repository, or individual artifacts across product environments and operating systems. Any user provisioned with this role has the ability to extract and load artifacts into any EPM System product that is registered with the same Shared Services instance.

  **Note:** Some EPM System products require that Lifecycle Management users be provisioned additional product roles (in addition to the LCM Administrator role) to perform Lifecycle Management tasks. For additional roles, see the appendixes at the end of this guide.

- **LCM Designer Role**—Shared Services user role that performs Lifecycle Management tasks. Users provisioned with the LCM Designer role can define a migration and perform an export operation, but cannot perform an import operation.

- **Migration Definition File**—Contains all information about a migration (source, destination, artifacts for migrations). You can create a migration definition from scratch, by using the samples files provided in the appendixes at the end of this guide, or by using the migration definition files in the File System folder in Shared Services Console. Migration definition files can be used to run migrations either in Shared Services Console or in Lifecycle Management Utility.
- **Shared Services Console**—Shared Services user interface that enables users to perform administrative tasks such as provisioning and lifecycle management.

- **Migration Options**—A part of Shared Services Console where you input migration export and import options to use during migrations.

- **Lifecycle Management Utility**—A command-line utility that provides an alternative way to migrate artifacts from source to destination. Lifecycle Management Utility can be used with a third-party scheduling service such as Windows Task Scheduler or Oracle Enterprise Manager.

- **Migration Properties**—The global parameters for migrations; for example, file system and log file locations, grouping size for batch migrations, enabling or disabling estimate reports, and so on.

- **Migration Status Report**—Provides user info, source and destination information, a progress indicator for “In Progress” migrations, migration date, time, and duration, and migration status (In Progress, Completed, or Failed). Migration detail is provided for migrations showing a status of Failed.

- **Lifecycle Management Log Files**—Capture all Lifecycle Management migration activity.

---

**EPM System Products and Components That Support Lifecycle Management**

The following EPM System products and components support Lifecycle Management:

- Shared Services
- Essbase
- Oracle Hyperion Reporting and Analysis (Oracle Hyperion Financial Reporting, Oracle Hyperion Interactive Reporting, Oracle Hyperion SQR Production Reporting, Oracle Hyperion Web Analysis)
- Financial Management
- Financial Close Management
- Planning
- Oracle Hyperion EPM Architect
- Oracle Hyperion Calculation Manager
- Oracle Hyperion Performance Scorecard
- Oracle Hyperion Profitability and Cost Management
- Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications
- Deployment Metadata
Table 1  EPM System Product Codes

<table>
<thead>
<tr>
<th>Product Code</th>
<th>Product Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUB</td>
<td>Shared Services</td>
</tr>
<tr>
<td>HREG</td>
<td>Oracle Hyperion Shared Services Registry</td>
</tr>
<tr>
<td>ESBAPP</td>
<td>Essbase</td>
</tr>
<tr>
<td>HAVA</td>
<td>Reporting and Analysis (Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis)</td>
</tr>
<tr>
<td>HFM</td>
<td>Financial Management</td>
</tr>
<tr>
<td>FCC</td>
<td>Financial Close Management</td>
</tr>
<tr>
<td>HP</td>
<td>Planning</td>
</tr>
<tr>
<td>BPMA</td>
<td>Performance Management Architect</td>
</tr>
<tr>
<td>CALC</td>
<td>Calculation Manager</td>
</tr>
<tr>
<td>HPS</td>
<td>Performance Scorecard</td>
</tr>
<tr>
<td>HPM</td>
<td>Profitability and Cost Management</td>
</tr>
<tr>
<td>AIF</td>
<td>ERP Integrator</td>
</tr>
</tbody>
</table>

Appendixes containing product-specific information are provided at the end of this guide.

Note: The following EPM System products are not integrated with Lifecycle Management: Oracle Hyperion Data Relationship Management, Oracle Essbase Integration Services, Oracle Essbase Studio, Oracle Hyperion Financial Data Quality Management, and Oracle Hyperion Strategic Finance.
Getting Started With Lifecycle Management

In This Chapter

- Lifecycle Management Requirements .......................................................... 17
- Installing Lifecycle Management .................................................................. 19
- Configuring Lifecycle Management for Shared Services High Availability .......... 20
- Quick Start to Lifecycle Management .......................................................... 20
- Backup and Recovery ................................................................................ 21
- Security .................................................................................................. 22

Lifecycle Management Requirements

Subtopics

- Prerequisites to Using
- Source and Destination Considerations
- File System Considerations
- Applications and Application Groups
- Availability of the EPM System Environment During Lifecycle Management Migration
- Other Important Points

Prerequisites to Using

- Install and configure Shared Services and EPM System products and verify that they are running. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide*.

- Ensure that the user performing Lifecycle Management operations is assigned the LCM Administrator role. See *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

- Assign additional product-specific roles as required. See the appendixes at the end of this guide.
Source and Destination Considerations

- The source and destination environments must use the same release number. For example, if you use release 11.1.2.2 of Shared Services to export artifacts, you must import using release 11.1.2.2. Using different releases to export and import artifacts is not certified.
- The source and destination must use the same user directory.
- During Lifecycle Management export and import operations, the product services must be up and running.

File System Considerations

- When migrating to and from a file system, the file system should be accessible to Shared Services Console or Lifecycle Management Utility on the network.
- The default destination for the file system is on the Shared Services Web application server computer; ensure that space is allocated on the Shared Services computer.

  The default file system destination on the Shared Services computer is $MIDDLEWARE_HOME/user_projects/epmsystem1/import_export$.

  The file system location is defined in the migration properties. This can also be customized to use a shared disk. See “Editing Migration Properties” on page 51.

Applications and Application Groups

- If the application being imported does not exist in the target environment, Lifecycle Management will create an application shell.
- Applications must be assigned to an application group or belong to the Default Application Group before migrations can occur. You cannot migrate applications belonging to the Default Application Group if two applications with the same name exist.

  Note: Only the Default Application Group can have multiple applications with the same name. However, artifact migration cannot occur unless they are assigned to another Application Group.
- If the application being imported belongs to an application group that does not exist in the target environment, Lifecycle Management will create the application group.

Availability of the EPM System Environment During Lifecycle Management Migration

Lifecycle Management operations for incremental migration of artifacts can be performed during normal usage of the application with the following exceptions:

- For complete migration of an application or a repository from one environment to another, Oracle recommends the systems to be in maintenance window.
In Financial Management, if the dimension metadata artifact is imported, the current user sessions of that application are invalidated, and users will need to re-open the application.

Upon import to Performance Scorecard, existing user sessions are invalidated; therefore, it is recommended that for Performance Scorecard, Lifecycle Management operations be performed in a maintenance window.

**Note:** There are no limitations for EPMA, Planning, Calculation Manager, Essbase, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis.

**Other Important Points**

- Do not use Lifecycle Management as your only means of backup and recovery. See “Backup and Recovery” on page 21.

- Deployment metadata artifacts contain physical server names and configuration information for the deployment. This information should not be migrated from one environment to another (for example, from Dev to Test). Migrating this data would corrupt the configuration information on the destination environment and would make the system unusable. See Appendix A, “Deployment Metadata and Lifecycle Management.”

- Lifecycle Management migration fails for artifacts and folders with the same name as a Windows-reserved name; for example, CON, PRN, AUX, NUL, and so on. (For a complete list of reserved names, refer to the vendor’s site for your operating system.)

- Financial Management data migration is not supported in Lifecycle Management.

- Planning data migration is not supported in Lifecycle Management.

- When performing a Reporting and Analysis migration, you must manually recreate clients/data sources for Production Reporting and Interactive Reporting on the target machine. See “Configuring the Production Reporting Job Service Properties on the Destination Application” on page 152 and “Creating Interactive Reporting Data Access Service Data Sources in the Destination Application” on page 153.

**Installing Lifecycle Management**

Lifecycle Management is installed with Shared Services. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide* for information about installing Shared Services and deploying it to an application server.

The components of Lifecycle Management are installed in `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0`. 
Configuring Lifecycle Management for Shared Services High Availability

When Shared Services is configured for high availability and is started as a Windows service, there are configuration steps that must be performed for Lifecycle Management. This scenario involves using a shared disk to store artifacts during migrations. You enter the shared disk location in the LCM Shared Disk Location field in Oracle Hyperion Enterprise Performance Management System Configurator.

For information on the LCM Shared Disk Location field in EPM System Configurator, see “Foundation-Specific Configuration Tasks” in the Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide. For information on configuring for high availability, see “Configuring Lifecycle Management for Shared Services High Availability” in the Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide.

Quick Start to Lifecycle Management

Lifecycle Management migrations follow this high-level process. Each part of the process is described in the guides or sections as noted in the table below.

| Caution! | Oracle recommends that you back up the destination environment before performing a Lifecycle Management import. Exports and imports using Lifecycle Management are not reversible. |

Table 2  Lifecycle Management Process

<table>
<thead>
<tr>
<th>Task</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Install and configure Shared Services and EPM System products.</td>
<td>Oracle Enterprise Performance Management System Installation and Configuration Guide</td>
</tr>
<tr>
<td>Note: Most products require that users be provisioned with additional roles to perform Lifecycle Management tasks. For additional roles, see the appendixes at the end of this guide.</td>
<td>For Shared Services Console, see Chapter 6, “Working With Lifecycle Management and Shared Services Console.” For Lifecycle Management Utility, see Chapter 7, “Using Lifecycle Management Utility.”</td>
</tr>
<tr>
<td>Task</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>4. In Shared Services Console or Lifecycle Management Utility, export the artifacts to the file system.</td>
<td>See “Exporting to the File System” on page 43.</td>
</tr>
<tr>
<td>For Classic Applications:</td>
<td></td>
</tr>
<tr>
<td>1. Select all Shared Services artifacts as required.</td>
<td></td>
</tr>
<tr>
<td>2. Select all product-specific artifacts as required.</td>
<td></td>
</tr>
<tr>
<td>All related artifacts can also be selected; for example, Calculation Manager rules, Financial Reporting reports, Essbase global substitution variables, and so on.</td>
<td></td>
</tr>
<tr>
<td>3. Export the selected artifacts to a single File System folder.</td>
<td></td>
</tr>
<tr>
<td>For EPMA Applications:</td>
<td></td>
</tr>
<tr>
<td>1. Select all Shared Services artifacts as required.</td>
<td></td>
</tr>
<tr>
<td>2. Select all EPMA artifacts as required.</td>
<td></td>
</tr>
<tr>
<td>3. Export the selected Shared Services and EPMA artifacts to a single File System folder.</td>
<td></td>
</tr>
<tr>
<td>4. Select all product-specific artifacts as required.</td>
<td></td>
</tr>
<tr>
<td>All related artifacts can also be selected; for example, Calculation Manager rules, Financial Reporting reports, Essbase global substitution variables, and so on.</td>
<td></td>
</tr>
<tr>
<td>5. Export the selected product-specific artifacts to a second File System folder.</td>
<td></td>
</tr>
<tr>
<td>5. Complete any product-specific migration prerequisites.</td>
<td>See the “Migration Prerequisites” section for each product in the appendixes at the end of this guide.</td>
</tr>
<tr>
<td>7. In Shared Services Console or Lifecycle Management Utility, import the artifacts from the file system.</td>
<td>See “Importing from the File System” on page 45.</td>
</tr>
<tr>
<td>For Classic Applications:</td>
<td></td>
</tr>
<tr>
<td>Right click the exported File System folder and select Import.</td>
<td></td>
</tr>
<tr>
<td>For EPMA Applications:</td>
<td></td>
</tr>
<tr>
<td>1. Right-click the File System folder that contains the EPMA application artifacts and select Import.</td>
<td></td>
</tr>
<tr>
<td>2. Deploy the EPMA application manually from the EPMA Application library.</td>
<td></td>
</tr>
<tr>
<td>3. Right-click the File System folder that contains the product-specific artifacts and select Import.</td>
<td></td>
</tr>
<tr>
<td>8. View the Migration Status Report to ensure that everything migrated successfully.</td>
<td>“Viewing Migration Status” on page 53</td>
</tr>
</tbody>
</table>

**Backup and Recovery**

Lifecycle Management does not replace the need for a physical backup of servers and content. Because Lifecycle Management can export most application artifacts, it is well-suited for archiving application content. You can use Lifecycle Management for the following use cases:
Making a temporary backup of artifacts when a business user wants to edit the application content. For example, if a change must be made to a dimension in Essbase or Planning, to ensure that the changes can be reverted if something goes wrong, you can perform an Lifecycle Management export of the dimension before making edits. This exported dimension will serve as a temporary backup. Then you can edit the dimension in the product.

Archiving artifacts before performing an import: If you are migrating content from a test system to production, you may want to archive the production artifacts by exporting them and checking the same into any version control system.

**Note:** Lifecycle Management can be used only as a logical backup and recovery solution and is not recommended as a solution for backing up and recovering data. Many products provide their own data backup and recovery solutions. These solutions are documented in the *Oracle Enterprise Performance Management System Backup and Recovery Guide*.

### Security

To use Lifecycle Management, security must be set up for users and groups through provisioning. The user who runs Lifecycle Management must have an LCM Administrator role assignment. The LCM Administrator can perform migrations for any applications registered to Shared Services. In other words, the LCM Administrator can extract and load to any application using the same Shared Services instance.

**Note:** Deployment metadata, Essbase, Reporting and Analysis, Financial Management, Planning, Performance Scorecard, and Profitability and Cost Management require that Lifecycle Management users be provisioned additional product roles (in addition to the LCM Administrator role) to perform Lifecycle Management tasks. For additional roles, see the appendixes at the end of this guide.

For information about assigning the LCM Administrator role, see the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*. 
Shared Services Use Cases

Subtopics

- Native Directory (Security) Migrations and Bulk Security Updates
- Migrating Taskflows
- Editing Shared Services Registry Data
- Migrating Provisioning Artifacts for a Specific EPM System Application
- Migrating with the LCM Designer Role

Native Directory (Security) Migrations and Bulk Security Updates

Lifecycle Management migrates Native Directory artifacts (assigned roles, delegated lists, groups, roles, and users) from one system to another. Lifecycle Management helps you define the Native Directory artifacts to migrate. Additionally, with Lifecycle Management, you can make bulk security updates within an environment; for example, you can change all the security assignments for a user or a set of users. In cases where a large number of users are provisioned to use various EPM System products using Shared Services, while exporting Native Directory artifacts, there is an option to filter the users and groups being exported.

See “Migrating Native Directory (Security)” on page 47.

Migrating Taskflows

You can use Lifecycle Management to migrate Shared Services taskflow artifacts for the following EPM System products:

- Financial Management
Taskflow artifacts enable you to migrate taskflow definitions from one environment to another or to edit taskflow definitions on the file system. For more information, see Appendix L, “Shared Services and Lifecycle Management.”

**Editing Shared Services Registry Data**

You can use Lifecycle Management to edit Shared Services Registry data to enable or disable Secure Socket Layer (SSL) connections and to perform other manual configuration changes. See “Editing Shared Services Registry Data” on page 48.

**Migrating Provisioning Artifacts for a Specific EPM System Application**

Lifecycle Management enables you to migrate provisioning artifacts for a specific application without migrating provisioning for all applications. Provisioning artifacts are displayed under the Native Directory (Assigned Roles) node in the Shared Services Console.

**Note:** The following image illustrates where to find the provisioning artifacts in Shared Services Console. In this example, the HP300 assigned roles artifacts are selected.
For procedural information, see “Migrating Native Directory (Security)” on page 47.

**Migrating with the LCM Designer Role**

Import operations in Lifecycle Management require an analysis of the target environment and are typically performed by administrators. The content to migrate, however, is typically defined by the business users of the application since they are aware of the changes in the system. The LCM Designer role allows a user to define a migration and perform an export operation, but restricts the user from performing an import operation.

For example, consider the following scenario:

A planning administrator who is responsible for managing the expense budgets makes a modification to the data form pertaining to expense accounts in the test environment. Assigning the planning administrator the LCM Designer role allows the administrator to define the migration to move the data form into production. The administrator then notifies the IT Manager that the artifacts are exported. The IT Manager copies the exported folder to production and performs the import operation. (The exported folder contains the definition for performing an import in the `Import.xml` file.)

The LCM Designer role is assigned in Shared Services Console. (See “EPM System Roles” in the *User Roles and Security Guide*.)
When a user is assigned the LCM Designer role, Shared Services Console has the following changes:

- The Purge Migration Status Report option on the Administration menu is disabled.
- The ability to import a single artifact after editing is disabled.
- The Import option displayed when you right-click a File System folder is disabled.
- The Import button at the bottom of Shared Services Console is disabled.
Artifact Migration Use Cases

Subtopics

- Application Migrations with Cross-Product Artifact Dependencies
- Exporting and Importing Artifacts for Editing Purposes
- Editing a Single Artifact

Application Migrations with Cross-Product Artifact Dependencies

To ensure a successful migration, Lifecycle Management enforces a specific order when importing artifacts, but only at the product level. Lifecycle Management does not automatically order the import of artifacts across multiple products (at the artifact level). For example, a Financial Management application might consist of dimensions and business rules from Performance Management Architect, user provisioning from Shared Services, and reports from Financial Reporting.

When using Lifecycle Management to migrate artifacts from multiple products, you must ensure that the cross-product dependent artifacts are present at the destination before importing the product artifacts. This is especially important when performing a first-time Lifecycle Management migration.

The Oracle by Example (OBE) series provides step-by-step instructions on how to perform first-time Lifecycle Management migrations for these products:

- Essbase 11.1.1 with Lifecycle Management 11.1.1
- Financial Management 11.1.1 with Lifecycle Management 11.1.1
- Planning 11.1.1 with Lifecycle Management 11.1.1
- Reporting and Analysis 11.1.1 with Lifecycle Management 11.1.1


Exporting and Importing Artifacts for Editing Purposes

Lifecycle Management enables you to export artifacts to the file system, edit them, and import them after editing. For detailed instructions, see “Exporting and Importing Individual Artifacts for Editing” on page 46.

Editing a Single Artifact

Shared Services Console enables you to export individual artifacts to the file system, edit them, and import them after editing without requiring a migration definition file. For detailed instructions, see “Exporting and Importing Individual Artifacts for Editing” on page 46.
Not all artifacts are editable on the file system. See “Editing Individual Artifacts” on page 47.

Artifacts must be imported back into the same application from which they were exported.

**Using Lifecycle Management With Version Control Systems**

With Lifecycle Management, you can use your existing document or source code-control systems, such as Oracle® Universal Content Management, to version EPM System artifacts. The most effective approach is to export artifacts to the file system and then import them to the version control system before importing them into production.

![Version Management Using Lifecycle Management](image)

This approach can be automated in several ways, depending on the production control tool used. For example, automation can be achieved by writing a script that first imports the exported artifacts to the version control system and then imports to the production system. By inserting this change in the process, we ensure that the artifacts in the production system are always in the corporate version control system with proper date metadata. Then the customer can answer date questions, such as: if the system was working properly last week and it is not working now, what changes to the artifacts have been migrated to production during the last week? If the version control system supports a compare feature, it can provide differences for EPM System artifacts that are text- or XML-based.

For details about migrating to and from the file system, see “Migrating Artifacts” on page 43.
Integrating Lifecycle Management with Existing Workflow Systems

You can integrate Lifecycle Management with existing workflow systems using Java APIs or a command-line utility. In most cases, the command-line utility is sufficient, because the logic of the migration is captured in the migration definition file. The migration definition file (an XML file) can be created using the Lifecycle Management functionality in Shared Services Console, or it can be created programmatically by the workflow system.

If you use the migration definition file created by Shared Services Console, it must be programmatically modified to add the user’s credentials to it. These credentials must be in plain text when inserted into the XML file but will be automatically encrypted the first time the migration is executed. Once the migration definition file is created, it can be invoked by the production management system using a command-line utility or Java API.
In This Chapter

- Lifecycle Management and Shared Services Console Integration ........................................... 31
- Launching Shared Services Console ......................................................................................... 31
- Overview of Shared Services Console ....................................................................................... 33

Lifecycle Management and Shared Services Console Integration

Lifecycle Management is integrated with Shared Services Console, and the artifacts are listed under Application Groups and Applications. For example, in Shared Services Console, an application group called Development is displayed. Under the Development application group, an HFM Management Reporting application is displayed. Under the HFM Management Reporting application, dimensional and nondimensional models are displayed (Accounts, Entities, Security, Member Lists, and so on).

Launching Shared Services Console

Subtopics

- Launching Shared Services Console From a URL
- Launching Shared Services Console from EPM Workspace

Access Shared Services Console in two ways:

- Access the Shared Services URL from a browser
- Use a menu option in Oracle Hyperion Enterprise Performance Management Workspace

Launching Shared Services Console From a URL

To launch Shared Services Console from a URL:

1. Go to:

   http://web_server_name:port_number/interop
In the URL, `web_server_name` indicates the name of the computer where the Web server used by Oracle Hyperion Foundation Services is running, and `port_number` indicates the Web server port; for example, `http://myWebserver:19000/interop`.

**Note:** If you are accessing Shared Services Console in secure environments, use `https` as the protocol (not `http`) and the secure Web Server port number; for example, use a URL such as: `https://myserver:19043/interop`.

2 Click **Launch Application**.

**Note:** Pop-up blockers may prevent Shared Services Console from opening.

3 On the Logon screen, enter your user name and password.

Initially, the only user who can access Shared Services Console is `admin` (the password for `admin` is specified in EPM System Configurator while deploying Foundation Services).

4 Click **Log On**.

**Note:** Valid SAP users may get a `CSSAuthenticationException` error message during log on if the SAP account is locked. Contact your SAP Administrator to unlock the account.

### Launching Shared Services Console from EPM Workspace

EPM Workspace is a portal from which you can access other EPM System products; for example, Performance Management Architect and Reporting and Analysis components such as Interactive Reporting and Web Analysis. The process of accessing Shared Services Console from EPM Workspace uses the single sign-on capabilities of EPM System to bypass the Shared Services Log On window.

**Note:** The Shared Services roles assigned to the current EPM Workspace user determines the resources available to the user in Shared Services Console.

To access Shared Services Console from EPM Workspace:

1 **Access EPM Workspace.**
   a. Go to:

   `http://Web_server_name:port_number/workspace`

   In the URL, `Web_server_name` indicates the name of the computer where the Web server used by Foundation Services is running, and `port_number` indicates the Web server port; for example, `https://myWebserver:19043/workspace`.

   **Note** the following:
   - If you are accessing EPM Workspace in secure environments, use `https` as the protocol (not `http`) and the secure Web Server port number. For example, use a URL such as: `https://myWebserver:19043/workspace`.  

   32  

   **Shared Services Console**
Pop-up blockers may prevent Shared Services Console from opening.

b. Optional: Click **Launch Application** if pop-up blockers prevent the **Log On** window from opening.

c. On the **Log On** window, enter your user name and password.

d. Click **Log On**.

2 From EPM Workspace, select **Navigate**.

3 Select **Administer**, and then **Shared Services Console**.

---

**Overview of Shared Services Console**

Shared Services Console consists of a View pane and task tabs. When you initially log in, the Shared Services Console displays the View pane and a Browse tab.

The View pane is a navigation frame where you can choose objects (such as user directories, users, groups, roles, application groups, and applications). Typically, details of your current selection in the View pane are displayed on the Browse tab. Additional task tabs open depending on the task that you perform; for example, a Report tab opens when you generate a report, and a Configure tab opens when you configure a user directory.

Depending on the current configuration, Shared Services Console lists your existing objects in the View pane. You can expand these object listings to view details. For example, you can expand the User Directories object to view a list of all configured user directories. You can also search configured user directories for users and groups.

A shortcut menu, accessible by right-clicking an object, is associated with some objects on the View pane.

Shortcut menus associated with objects in the View pane provide the quickest method to perform operations on the objects. Options in shortcut menus change dynamically, depending on what you select. The commands in the shortcut menu also are available in a menu in the menu bar. Buttons representing enabled menu options are displayed on the toolbar.

**Note:** Because Native Directory is administered from Shared Services Console, some shortcut menu options for Native Directory are not available for other user directories.
Overview

Application groups and applications are important EPM System concepts. An application is a reference to a single instance of an EPM System product that is registered with Shared Services. Provisioning and Lifecycle Management activities are performed against an application. Generally, applications are grouped into application groups.

Working with Application Groups

Subtopics

- Creating Application Groups
- Modifying Application Group Properties
- Deleting Application Groups

Generally, when you deploy an application, EPM System places the application in an existing application group of your choice or into the default application group.

An application group is a container for EPM System applications. For example, an application group may contain a Planning application and Reporting and Analysis applications. While an application can belong to only one application group, an application group can contain multiple applications.

EPM System products place their applications into their own application groups. If an EPM System product does not create its own application group, you can select one; for example, Default Application Group, to organize the applications.

Applications that are registered with Shared Services but are not added to an application group are listed under the Default Application Group node in the View pane. You can provision users and groups with roles from applications listed in the Default Application Group node and then move the application to an application group without losing provisioning information. You can create custom application groups, if needed.
Note: You must be a Shared Services Administrator or Project Manager to create and manage application groups. Shared Services Administrators can work with all registered applications; a Project Manager can work only with the applications for which that person is the provisioning manager. See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

Creating Application Groups

During application group creation, you can also assign applications to the new application group.

To create an application group:

1. Launch Shared Services Console.
   See “Launching Shared Services Console” on page 31.

2. In the View pane, right-click Application Groups, and then select New.
   The New Application Group screen opens.

3. For Name, enter a unique application group name, and, for Description, enter an optional description.

4. To assign applications to this application group:
   a. From List Applications in Application Group, select an application group that contains the application that you want to assign.
   b. Click Update List.
      The Available Applications list displays the applications that you can assign to the application group.
   c. From Available Applications, select the applications to assign to the application group, and then click Add.
   d. To remove an assigned application, from Assigned Applications, select the application to remove, and then click Remove. To remove all applications that you assigned in the current session, click Reset.

5. Click Finish.

6. Click Create Another to create another application group, or click OK to close the status screen.

Modifying Application Group Properties

You can modify all properties and settings of an application group, including application assignments.

Note: You can also add applications to application groups by moving them from another application group. See “Moving Applications” on page 38.
To modify an application group:

1. Launch Shared Services Console.
   
   See “Launching Shared Services Console” on page 31.

2. From the View pane, select Application Groups.

3. On the Browse tab, right-click the application group, and then select Open.

4. Modify the application group properties as needed.
   
   See step 4 on page 36 for information on assigning or removing applications.

5. Click Save.

Deleting Application Groups

Deleting an application group removes the association of applications with the application group, removes provisioning assignments from applications, and deletes the application group.

To delete an application group:

1. Launch Shared Services Console.
   
   See “Launching Shared Services Console” on page 31.

2. In the View pane, right-click the application group, and then select Delete.

3. Click Yes.

Note: You cannot delete the Default Application Group or the Foundation Application Group. You also cannot delete the File system node in Shared Services Console.

Managing Applications

Subtopics

- Moving Applications
- Deleting Multiple Applications
- Deleting an Application

Shared Services tracks registered EPM System applications. Generally, EPM System products are registered with Shared Services when you deploy them using EPM System Configurator. EPM System application instances are registered with Shared Services when you deploy them.

Registering some applications creates application groups and assigns applications to them. If registration does not create an application group, the application is listed under the Default Application Group. You can provision these applications. When you move applications from the Default Application Group to an application group, Shared Services retains the provisioning information. You can migrate applications under the Default Application Group, even if they are not assigned to an application group.
Note: Only the Default Application Group can have multiple applications with the same name. However, artifact migration cannot occur unless applications are assigned to another Application Group.

Moving Applications
Moving an application from an application group removes the association between the application and the application group.

To move an application:
1. Launch Shared Services Console.  
   See “Launching Shared Services Console” on page 31.
2. Expand the node of the application group that contains the application to move.
3. Right-click the application and select Move To.
4. On the Move To tab, select the application group to which you want to move the application.
5. Click Save.

Note: You cannot move Shared Services and Deployment Metadata applications from the Foundation application group.

Deleting Multiple Applications
When Shared Services administrators delete applications, the provisioning information also is deleted.

To delete multiple applications:
1. Launch Shared Services Console.  
   See “Launching Shared Services Console” on page 31.
2. In the View pane, right-click Application Groups, and then select Delete Applications.
3. Select the applications to delete.
   To delete all applications within an application group, select the application group.

   Note: You cannot delete application groups from this screen. See “Deleting Application Groups” on page 37.
4. Click Delete.
5. Click OK.
Deleting an Application

Shared Services administrators can delete applications from application groups. When you delete an application from an application group, all provisioning information for that application is removed.

To delete an application:

1. **Launch Shared Services Console.**
   
   See “Launching Shared Services Console” on page 31.

2. In the View pane, expand the node of the application group that contains the application to delete.

3. Right-click the application, and then select Delete.

4. Click OK.
Viewing Artifacts

The Lifecycle Management interface in Shared Services Console enables you to view, search, export, and import artifacts. The artifacts are sorted into categories so that they are exposed in an organized manner.

The tabular Lifecycle Management interface enables you to view multiple applications.

Note: Artifacts vary by product.

For a detailed list of product artifacts and categories, see the appendixes at the end of this guide.

➢ To view artifacts in Shared Services Console:

1. **Launch Shared Services Console.**
   
   See “Launching Shared Services Console” on page 31.

2. **Expand the Application Groups node in the View pane to view application groups.**

3. **Expand an application group to view applications.**

   **Note:** The **Foundation** application group contains Foundation applications such as Calculation Manager, Deployment Metadata, Shared Services, and Performance Management Architect. The **File System** node reads the default Shared Services file system location (defined in Oracle Hyperion Enterprise Performance Management System Configurator).

4. **Select an application to view the artifact listing (or right-click the application and select Explore).**
An Artifact List tab displays the artifact listing.

Above the artifact listing, these view options are displayed:

- **Artifact List**—Displays application and repository artifacts
  
  A new tab is displayed for each Application Group. After a migration completes, the tabs close.

- **Selected Artifacts**—Displays all previously selected artifacts on one tab
  
  The Lifecycle Management interface remembers the artifacts that you have selected as you move between the applications and application groups. This functionality is useful when defining an application migration consisting of multiple products.

- **Search Artifacts**—Displays artifact search options

## Searching Artifacts

You can view artifact search options using the Search Artifacts option above the artifact listing.

1. Launch Shared Services Console.
   
   See “Launching Shared Services Console” on page 31.

2. View artifacts. See “Viewing Artifacts” on page 41.

3. On the Artifact List tab, click Search Artifacts.

4. Enter search options:

   - **Artifact Name**—The name of the artifact. Use an asterisk (*) as the wildcard in pattern searches or to search for artifacts that match filter conditions. For example, entering A* returns all artifacts that begin with A (or lowercase a, because the search is not case-sensitive). *A returns all artifacts that end with A (or lowercase a).

   - **Date Modified**—Choose from these options:
     
     - **Today**—Artifacts modified today
     - **Yesterday**—Artifacts modified yesterday
     - **Last 7 days**—Artifacts modified within the last seven days
     - **Last Month**—Artifacts modified last month
     - **Date Range**—Artifacts modified within a specified date range (start and end dates, inclusive).

   **Note:** Artifacts that do not support the modified date are always displayed.

   For a listing of artifacts that do not support the modified date or time, see the appendixes at the end of this guide.

   - **Start Date**—Beginning date of date range; for example, 01/01/2008
Migrating Artifacts

Subtopics

- Exporting to the File System
- Importing from the File System
- Exporting and Importing Individual Artifacts for Editing
- Migrating Native Directory (Security)

You can migrate artifacts to and from the file system in the following instances:

- when the source and destination are registered to the same Shared Services instance
- when the source and destination are registered to different Shared Services instances but with a shared file system

If the source and destination are not registered to the same Shared Services instance and are not on the same network, you can export artifacts to an intermediary file system and use FTP, DVD, or another transfer method to transfer the intermediary file system to the destination system.

Note: In a transfer scenario, ensure that the file system folder is copied directly into the import_export folder in MIDDLEWARE_HOME/user_projects/epmsystem1.

Exporting to the File System

The file system location is on the Shared Services Web application server computer. The default destination on the Shared Services computer is MIDDLEWARE_HOME/user_projects/epmsystem1/import_export. Applications or artifacts exported (or copied) to the file system location are displayed under the File System node in the View pane. When artifacts are exported to the file system, they retain the last modified time the artifact was updated in the native product.

Note: On Windows 2003, if Shared Services is started as a Windows service, and the file system path is defined for a mapped drive, you cannot view the file system contents using Shared Services Console. If the file system path is a network-accessible location, ensure that Shared Services is not running as a Windows service.
To export artifacts and applications to the file system using Shared Services Console:

1. **Launch Shared Services Console.**
   
   See “Launching Shared Services Console” on page 31.

2. **Select Administration, and then Migration Options.**

3. **On the Migration Options tab, review the export options for the migration.**

   Only the options for the products that are installed are displayed. The options differ by product, and not all products have export options. You can accept the default options without making any changes if desired.

   (For a listing of options by product, see the appendixes at the end of this guide.)

4. **If you made any changes to the migration options, click Save.**

5. **Expand the Application Groups node and select the applications to export.**

   When you select an application, an Artifact List tab displays the application and repository artifacts for that application.

6. **On the Artifact List tab for each application, select the artifacts to export.**

   To select an individual artifact, click the checkbox next to the artifact. To select all the artifacts, click Select All.

7. **Click the Export button at the bottom right of Shared Services Console.**

8. **In the Export dialog box, enter the File System Folder where the artifacts will be exported and click Export.**

   A default file system folder name is displayed in the format of username DD-MM-YY Hour_Min; for example, admin 03-01-12 09_32. You can either accept the default or enter a different file system folder name.

   Note that Lifecycle Management does not allow characters in a folder name that are not supported by the native operating system. For example, Windows does not allow colons in a folder name, and so neither does Lifecycle Management.

   All the applications and artifacts selected are exported to the specified file system folder. (You do not need to specify different file system folders if you have more than one application.)

   If you specify a file system folder name that already exists on the file system, you will be prompted to provide a new file system folder name.

9. **View the migration status on the Migration Status Report tab.**

   See “Viewing Migration Status” on page 53.

After the artifacts are successfully migrated, a new file system folder is created under the File System node in Shared Services Console. When you expand the file system folder, the applications are displayed with the product name followed by the application name.
Tip: Artifacts that are migrated to the file system can be secured. The first level of security is file system security. To limit access to artifacts on the file system, modify the permissions on the import_export folder to ensure that the user who starts Shared Services has full permissions on the import_export folder; no other user has these permissions. If an additional level of security is needed, the content of the import_export folder can be moved to a password-protected container such as Winzip, or it can be encrypted on the file system using PGP or other data encryption methods. Ensure that before the artifacts are imported from the file system, they are unencrypted by the authorized user.

Re-exporting Artifacts to the File System

You can re-export artifacts to the file system if desired. To re-export artifacts, right-click a folder under the File System node and select Repeat Export.

When you repeat an export, the artifacts get exported into a new file system folder. To re-import the artifacts, right-click the folder under the File System node and select Import. (You should check the migration options set for the product before importing.)

Importing from the File System

The file system location is on the Shared Services Web application server computer. The default destination on the Shared Services computer is MIDDLEWARE_HOME/user_projects/epmsystem1/import_export. Applications or artifacts exported (or copied) to the file system location are displayed under the File System node in the View pane. When artifacts are exported to the file system, they retain the last modified time the artifact was updated in the native product.

To import artifacts and applications from the file system using Shared Services Console:

1. Back up the destination environment.
   
   See Oracle Enterprise Performance Management System Backup and Recovery Guide.

2. Launch Shared Services Console.
   
   See “Launching Shared Services Console” on page 31.

3. Select Administration, and then Migration Options.

4. On the Migration Options tab, define the import options for the migration.
   
   Import options differ by product.
   
   (For a listing of options by product, see the appendixes at the end of this guide.)
   
   Only the migration options for the products that are installed are displayed.

5. Expand the File System node and select the applications to import.

   When you select an application, an Artifact List tab displays the application and repository artifacts for that application.

6. Import the artifacts in one of the following ways:

   • Right-click a File System folder and select Import.
This imports all the applications in that folder. If you select to import a File System folder, a dialog box is displayed asking you to confirm that you want to proceed with the import.

- Right-click an individual application under a File System folder and select **Import**.
- On the **Artifact List** tab for each application, select the artifacts to import, and click the **Import** button at the bottom right of Shared Services Console.

The Import button is disabled for users assigned the Designer Role.

7. In the **Import** dialog box, select the application to import and click **Import**.

By default, the application name from the File System (migration definition file) is displayed. The application will be created if it does not already exist.

8. View the migration status on the **Migration Status Report** tab.

See “Viewing Migration Status” on page 53.

### Exporting and Importing Individual Artifacts for Editing

**Subtopics**

- Exporting Individual Artifacts for Editing
- Editing Individual Artifacts
- Importing Individual Artifacts After Editing

Shared Services Console enables you to export individual artifacts to the file system, edit them, and import them back again after editing. Artifacts must be imported back into the same application from which they were exported.

**Note:** Not all artifacts are editable on the file system. See “Editing Individual Artifacts” on page 47.

### Exporting Individual Artifacts for Editing

- To export individual artifacts using Shared Services Console:
  1. Launch **Shared Services Console**.
     
     See “Launching Shared Services Console” on page 31.
  2. Expand the **Application Groups** node in the View pane to view application groups.
  3. Expand an application group to view applications.
  4. Select an application to view the artifact listing (or right-click the application and select **Explore**).
  5. Right-click the artifact to export and select **Export for Edit**.
  6. In **File Download**, click **Save**.
  7. Enter the save location on the local file system and click **Save**.
**Note:** For Reporting and Analysis only, artifacts are saved to the local file system in a ZIP file. You must unzip the artifact to edit it. For all other products, the artifact is saved directly to the file system and not in a ZIP file.

### Editing Individual Artifacts

Because artifacts are individual application or repository items (for example, scripts, Web and data forms, rules files, documents, financial reports, and so forth), the editing method differs depending on the type of artifact. Some artifacts can be edited using a text editor, and others may need to be edited within the product. For example, Calculation Manager artifacts are XML-based and can be edited using a text editor.

Review the artifact listings in the appendixes at the end of this guide to determine if an artifact is editable on the file system.

**Caution!** Do not rename the files exported for edit, or the import will fail.

### Importing Individual Artifacts After Editing

Artifacts must be imported back into the same application from which they were exported. Artifacts must also use the same file name that was used during export.

1. **To import individual artifacts using Shared Services Console:**
   1. Launch Shared Services Console.
      
      See “Launching Shared Services Console” on page 31.
   2. Expand the Application Groups node in the View pane to view application groups.
   3. Expand an application group to view applications.
   4. Select an application to view the artifact listing (or right-click the application and select **Explore**).
   5. Right-click any artifact within the application and select **Import after Edit**.
   6. In **Load Artifact**, enter the local file system location where the artifact is saved, and click **Finish**.

### Migrating Native Directory (Security)

You can migrate Native Directory artifacts (assigned roles, groups, roles, and users) in the same way that you migrate application artifacts.

Shared Services Native Directory artifacts are listed in the Shared Services node under the Foundation application group.

**Note:** Product application security artifacts (for example, Financial Management security classes or Essbase filters) are listed separately under the product application groups. For a listing of application security artifacts by product, see the appendixes at the end of this guide.
To migrate Shared Services Native Directory (Security) artifacts using Shared Services Console:

1. **Back up the destination environment.**
   See the *Oracle Enterprise Performance Management System Backup and Recovery Guide*.

2. **Launch Shared Services Console.**
   See “Launching Shared Services Console” on page 31.

3. On the View pane, from the **Application Groups** node, expand the **Foundation** application group.

4. Select **Shared Services** (or right-click **Shared Services** and select **Explore**).

5. Expand **Native Directory** and select the following Native Directory artifacts:
   - Assigned Roles
   - Delegated Lists
   - Groups
   - Roles
   - Users

6. Expand **Assigned Roles** and select the assigned roles for the application that you are migrating.

7. Select **Export**.

8. In the **Export** dialog box, enter the **File System Folder** where the artifacts will be exported and click **Export**.

9. View the migration status on the **Migration Status Report** tab.

---

**Editing Shared Services Registry Data**

**Subtopics**

- Viewing Shared Services Registry Data
- Exporting Shared Services Registry Data
- Editing Shared Services Registry Data
- Importing Shared Services Registry Data

Shared Services Registry is part of the database that you configure for Shared Services. (It shares the tablespace with the Shared Services database.)

**Note:** In previous releases, Shared Services Registry was sometimes referred to as EPM System Registry.

Created the first time you configure EPM System products, Shared Services Registry simplifies configuration by storing and reusing the following information for most EPM System products that you install:
- Initial configuration values such as installation directories, database settings, and deployment settings
- The computer names, ports, servers, and URLs that you use to implement multiple, integrated, EPM System products and components
- Dependent service data

Lifecycle Management provides a user interface that enables users to view registry content and export registry data to the file system, where it can be edited and reimported. Users performing Lifecycle Management operations for deployment metadata must be assigned both the LCM Administrator and Shared Services Administrator roles.

**Caution!** The Shared Services Registry artifacts are available as part of Lifecycle Management for editing configuration information on a given environment only. Do not use Lifecycle Management to migrate Shared Services Registry data from one environment to another.

Lifecycle Management helps you define Shared Services Registry artifacts to export. Shared Services Console also enables you to export individual registry artifacts to the file system, edit them, and import them back in after editing.

You can view all Shared Services Registry artifacts in the Shared Services Console under the Deployment Metadata node in the Foundation application group:

- All nodes (as per the registry taxonomy) are directories in Lifecycle Management.
- All attributes of a node are artifacts in Lifecycle Management.
- For attributes that are files (for instance, XML files), there is an artifact for the corresponding file type.
- All named value pair attributes for a node (component or product) are grouped into one artifact. This artifact is a file that contains all these attributes and gets copied when an Lifecycle Management export is performed.

For a listing of Shared Services Registry artifacts and Shared Services Registry migration options, see Appendix A, “Deployment Metadata and Lifecycle Management.”

**Viewing Shared Services Registry Data**

1. **To view Shared Services Registry data using Shared Services Console:**
   1. Launch Shared Services Console.
      
      See “Launching Shared Services Console” on page 31.
   2. From the Application Groups node in the View pane, expand the Foundation application group.
   3. Select Deployment Metadata (or right-click Deployment Metadata and select Explore).
   4. Select Shared Services Registry.
Exporting Shared Services Registry Data

Caution! The Shared Services Registry artifacts are available as part of Lifecycle Management for editing configuration information on a given environment only. Do not use Lifecycle Management to migrate Shared Services Registry data from one environment to another.

➤ To export Shared Services Registry data using Shared Services Console:
1. Launch Shared Services Console.
   See “Launching Shared Services Console” on page 31.
2. From the Application Groups node in the View pane, expand the Foundation application group.
3. Select Deployment Metadata (or right-click Deployment Metadata and select Explore).
4. Expand Shared Services Registry.
5. Select the Shared Services Registry artifacts to export.
   To select an individual artifact click the checkbox next to the artifact. To select all the artifacts, click Select All.
7. In the Export dialog box, enter the File System Folder where the artifacts will be exported and click Export.
8. View the migration status on the Migration Status Report tab.

Editing Shared Services Registry Data

➤ To edit Shared Services Registry data on the file system:
1. Navigate to the file system location where the Shared Services Registry data was copied or exported.
2. Edit the data.
3. Save the changes.

Importing Shared Services Registry Data

➤ To import Shared Services Registry data using Shared Services Console:
1. Launch Shared Services Console.
   See “Launching Shared Services Console” on page 31.
2. From the File System node in the View pane, right-click the File System folder specified during export and select Import.
Editing Migration Properties

Lifecycle Management uses migration properties to set the global parameters for migrations.

To modify the migration properties:

1. Launch Shared Services Console.
   See “Launching Shared Services Console” on page 31.

2. On the View pane, expand the Application Groups node.

3. Under Application Groups, expand Foundation, and then Deployment Metadata.

4. On the Artifact List tab, expand Shared Services Registry, then Foundation Services, and then Shared Services.

5. Select the Properties artifact; then, right-click and select Export for Edit.

6. In the File Download dialog box, save the Properties artifact to the desired location.

7. Edit the migration properties as desired.

8. Return to Lifecycle Management, right-click the Properties artifact used in Step 5, and select Import after Edit.

9. In the Import after Edit dialog box, point to the file system where the edited Properties artifact is available.


Table 3  Migration Properties and Their Descriptions

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>double-encoding</td>
<td>Allows Base64 encoding on top of UTF-8 encoding in Financial Management application migrations. This property is not supported if you are performing Financial Management migrations in a mixed-release environment (for example, using a previous release of Financial Management with this release of Shared Services). If you are performing a Financial Management application migration in a mixed-release environment, set this property to false. Default value: true</td>
</tr>
<tr>
<td>filesystem.artifact.path</td>
<td>Location of the directory where the exported applications are to be stored. This is the shared disk location if Shared Services is configured for high-availability. To customize this parameter, uncomment this line and add a path location. Default value: This parameter is commented out and the Lifecycle Management engine uses the default file system location on the Shared Services computer; for example, MIDDLEWARE_HOME/user_projects/epmsystem1/import_export. Note: On Windows 2003, if the file system path is a network-accessible location, you must use a UNC path, or a shared file system with read/write permissions for concurrent access.</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>fileSystem.friendlyNames</td>
<td>Whether to store the files for an artifact with extended names (a combination of artifact ID and name). If the value is <code>true</code> or if this property is missing, the path for the files corresponds to the artifact path in listing.xml. If the value is <code>false</code>, the pathAlias value in listing.xml is used. Some file systems have a directory path depth limitation. In rare cases, the file system might not allow a depth of more than 256 characters, in other cases 4000 characters. If an application has a directory structure that can be greater than this limit, this property can be set to <code>false</code> and the Lifecycle Management engine will use shorter names (UUIDs) for the directory and artifact names. Recommended value is <code>true</code>.</td>
</tr>
<tr>
<td></td>
<td><strong>Default value:</strong> <code>true</code></td>
</tr>
<tr>
<td>groupcount</td>
<td>Number of artifacts that are migrated in a group. This option is available for products that support migration in groups (Planning, Financial Management, Financial Close Management, Oracle Fusion Performance Management, Reporting and Analysis, and ERP Integrator). The default group count is 30. This means that artifacts are migrated in groups of 30. Based on data regarding types of artifacts, size of artifacts, and number of artifact, this value can be changed to improve migration performance.</td>
</tr>
<tr>
<td>hfmCallBackPortRange</td>
<td>Callback port for status updates on Financial Management application creation. <strong>Default value:</strong> <code>12010-12210</code></td>
</tr>
<tr>
<td>HFM.client_timeout</td>
<td>HTTP Session Time Out setting for Lifecycle Management SOAP calls from Lifecycle Management and Shared Services to Financial Management Web Service. <strong>Default value:</strong> <code>5000</code></td>
</tr>
<tr>
<td>report.enabled</td>
<td>Enables you to use the <code>-estimate</code> argument in Lifecycle Management Utility to estimate the number of artifacts in a proposed migration. For more information about using the <code>-estimate</code> argument, see “Running Lifecycle Management Utility” on page 63. <strong>Default value:</strong> <code>Y</code></td>
</tr>
<tr>
<td>report.folder_path</td>
<td>Directory where the migration status and artifact estimation reports are stored. <strong>Default value:</strong> <code>../reports (MIDDLEWARE_HOME/user_projects/epmsystem1/diagnostics/logs/migration/reports)</code></td>
</tr>
</tbody>
</table>

**Lifecycle Management Reports**

**Subtopics**

- Migration Status Reports
- Artifact Reports

Shared Services provides these Lifecycle Management reports:

- Migration Status Report
- Artifact Audit Report
Shared Services also generates Provisioning Reports, Security Reports, and Config Reports. These reports are described in the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

Migration Status Reports

Subtopics

- Viewing Migration Status
- Purging Migration Data

Viewing Migration Status

LCM Administrators can view a Migration Status Report for the status of all migrations:

- **In Progress**—Migration in progress
- **Completed**—All artifacts were successfully migrated
- **Completed with Warning**—All artifacts were successfully migrated; however, there are issues that you may wish to look into.
- **Failed**—Some artifacts were not migrated.

**Note:** For migrations with a status of Complete with Warning or Failed, click the hyperlink to view migration details. Migration details are not available for In Progress or Completed migrations.

To view migration status reports using Shared Services Console:

1. **Launch Shared Services Console.**
   
   See “Launching Shared Services Console” on page 31.

2. **From Administration, select Migration Status Report.**

   You can view the following information about each migration:
   
   - User
   - Source
   - Destination
   - Start Time
   - Completed Time
   - Duration
   - Status—In Progress, Completed, Completed with Warning, or Failed

   **Note:** A progress indicator in the Source-Destination column provides the number of artifacts processed for In Progress migrations.
3 If a migration has a status of Completed with Warning or Failed, you can view the following migration details by clicking the hyperlink in the Status column:
   - Source and Destination Applications
   - Artifact Path
   - Artifact Name
   - Message Type (Error or Warning)
   - Message

4 To regenerate the Migration Status Report, click Refresh.

5 To close the Migration Status Report, click Cancel.

**Purging Migration Data**

This feature enables you to delete the specified migration data. Only completed or failed migrations can be deleted. In Progress migrations cannot be purged.

► To purge migration data using Shared Services Console:

1 Launch Shared Services Console.
   See “Launching Shared Services Console” on page 31.

2 From Administration, select Purge Migration Status Report.

3 In Purge, specify a value:
   - -1—Deletes all migration data
   - 0—Deletes all migration data performed prior to today
   - n—Deletes all migration data before a specified number of days from today; for example, entering 2 deletes all migration data before two days from today. (The value for n must be a positive number no greater than 999.)

4 To delete the specified migration data, click Purge.

5 To close the Purge dialog box without deleting data, click Cancel.

**Artifact Reports**

The Application Audit Report presents information about the artifacts that were imported or exported using the Lifecycle Management functionality. Only a Shared Services Administrator can generate and view audit reports. An LCM Administrator cannot perform audit tasks.

**Note:** Auditing must be enabled before you can generate audit reports. To enable auditing, launch Shared Services Console, then select Administration and Configure Auditing, and then select the Enable Auditing checkbox.

For more information, see the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.
If auditing is enabled, audit reports can be generated at the application level or at the application group level. Every action taken within Lifecycle Management is logged to the Artifact Report. The Artifact Report tracks which artifacts were migrated, when they were migrated, and by whom. This report is exportable to an external file.

To generate artifact reports using Shared Services Console:

1. Launch Shared Services Console.
   See “Launching Shared Services Console” on page 31.
2. From Administration, select Audit Reports, and then select Artifact Reports.
   The Application Audit Report is displayed.
3. Enter report parameters:
   - **Performed By**—Select the users for which the report is to be generated or select all users.
   - **Performed During**—Select the period for which the report is to be generated.
     - **5 Days**—Events within the last 5 days
     - **10 Days**—Events within the last 10 days
     - **15 Days**—Events within the last 15 days
     - **20 Days**—Events within the last 20 days
     - **25 Days**—Events within the last 25 days
     - **30 Days**—Events within the last 30 days
     - **Date Range**—Events within a specified date range (inclusive).
4. To view the report, click View Report.
5. To view or save the report in a CSV file format, click Export.
6. To close the report, click Close.
Lifecycle Management Utility Process

Lifecycle Management Utility is a command-line utility that supports the migration of artifacts across product environments and operating systems. The utility provides an alternate way to migrate entire applications, or individual artifacts, from source to destination.

Figure 4 depicts the communication flow between services and Lifecycle Management Utility:
1. **Process Migration Definition File**: Lifecycle Management Utility first reads and processes the migration definition file.

2. **Authenticate**: Lifecycle Management Utility then authenticates the user with the corporate LDAP directory or another provider configured for use with Shared Services. The Shared Services Registry database must be running during initialization.

3. **Authorize**: After authentication, Lifecycle Management Utility contacts Shared Services Native Directory to ensure that the user’s role authorizes them to perform the requested operation.

4. **Registration Information**: Lifecycle Management Utility communicates with Shared Services Registry and the Shared Services database to obtain EPM System application registration information.

5. **Process each application migration request**: Lifecycle Management Utility processes each import or export operation by contacting the appropriate EPM System application.

6. **Audit**: Lifecycle Management Utility audits each Lifecycle Management action, if auditing is enabled, by contacting the Shared Services Web application over HTTP.

7. **Publish status report**: Lifecycle Management Utility contacts the Shared Services Web application over HTTP to publish the migration status report.

### Lifecycle Management Utility Features

- Migrates one or more EPM System applications or application artifacts from one environment to another
- Enables users to perform scheduled migrations using a third-party scheduling service such as Windows Task Scheduler or Oracle Enterprise Manager
- Ensures secure access to the utility
  - Only users assigned the LCM Administrator role can perform Lifecycle Management operations.
- Supports migration of internationalized data
- Logs errors to facilitate troubleshooting

**Note**: For Lifecycle Management Utility requirements, see “Lifecycle Management Requirements” on page 17.

### Installing Lifecycle Management Utility

Lifecycle Management Utility is installed with Shared Services. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide* for information about installing Shared Services and deploying it to an application server.
The components of Lifecycle Management Utility are installed to `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0`. Note that although the components are installed here, you must run the utility from `MIDDLEWARE_HOME/user_projects/epmsystem1/bin`.

**Running Lifecycle Management Utility from a Non-Foundation Services Machine**

In EPM System, apart from the machine where Foundation Services is configured, Lifecycle Management Utility migrations can only be run from a machine where EPM System products are configured as part of a distributed EPM System configuration. Migrations using Lifecycle Management Utility cannot be run from standalone client machines that do not have any EPM System products installed.

To run Lifecycle Management Utility from a non Foundation Services machine:

1. Copy `Utility.bat` (Windows) or `Utility.sh` (UNIX) from `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/bin` to `MIDDLEWARE_HOME/user_projects/epmsystem1/bin`
2. Navigate to `MIDDLEWARE_HOME/user_projects/epmsystem1/bin` and execute `Utility.bat` or `Utility.sh`.

**Using Lifecycle Management Utility**

**Subtopics**

- Before Starting Migrations
- Creating Migration Definitions
- Migration Definition File XML Schema
- Migration Definition File Elements
- Running Lifecycle Management Utility
- Additional Command-line Arguments

**Before Starting Migrations**

Before starting migration using Lifecycle Management Utility, do the following:

- Verify that Shared Services is running.
- Back up the destination environment.
- Create the migration definition.
- Optional: Modify the property file to use for the migration.
**Creating Migration Definitions**

Artifacts to migrate must be defined in a migration definition. EPM System provides sample files (in `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample`) for you to model the migration definition to use during migrations. You can create a migration definition manually or you can create one automatically in Shared Services Console.

**Migration Definition File XML Schema**

A sample file to model the migration definition is available in `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample`.

For sample migration definition files by product, see the appendixes at the end of this guide. Figure 5 depicts an XML schema outline of the migration definition.

**Figure 5  XML Schema Outline of the Migration Definition File**

![XML Schema Outline of the Migration Definition File](image)

**Migration Definition File Elements**

Subtopics
- **Locale**
- **User and Password**
- **Task**

This section describes the elements and attributes used in the XML schema for migration definition files.

**Locale**

Defines the server locale at the time the migration definition file is created. All error messages and console messages are included in this locale.

**User and Password**

Defines the user name and encrypted password of the user who will be executing the migration definition file.
Task

Defines the tasks to complete during the migration. A task that is defined in the migration definition file depends on the source, the destination, and the artifacts to migrate. At a minimum, each task contains source, destination, and artifact tags.

For multiple sources and destinations, you must define at least one task for each source-destination combination. For example, extracting artifacts to the file system would be defined as task 1. Loading the artifacts from the file system to an application would be defined as task 2.

Task contains these elements:

- **Source**
- **Target**
- **Artifact**
- **Options**

Source

Defines the source for the migration. You must define one source and one destination per task.

Table 4  Source Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>application</td>
<td>Name with which the application is registered. The application name is visible in Shared Services Console. <strong>Example:</strong> HAVAAPP1</td>
</tr>
<tr>
<td>filePath</td>
<td>Directory where artifacts are stored on the file system. <strong>Example:</strong> <code>filePath=&quot;/Essbase.Sample.Basic&quot;</code>&lt;br&gt;&lt;br&gt;Note: When an .mdf file is generated from the UI, the path is a relative path to the working folder. If the .mdf file is not in the working folder, you can edit the .mdf file to overwrite the relative path with an absolute path.</td>
</tr>
<tr>
<td>product</td>
<td>Product code for the application that is registered with Shared Services. <strong>Examples:</strong>&lt;br&gt;  - HUB (Shared Services)&lt;br&gt;  - HAVA (Reporting and Analysis)&lt;br&gt;  - ESBAPP (Essbase)&lt;br&gt;  - HFM (Financial Management)&lt;br&gt;  - HP (Planning)&lt;br&gt;  - BPMA (Performance Management Architect)&lt;br&gt;  - CALC (Calculation Manager)&lt;br&gt;  - HPS (Performance Scorecard)&lt;br&gt;  - HPM (Profitability and Cost Management)</td>
</tr>
<tr>
<td>project</td>
<td>Name of the Shared Services Application Group to which the application belongs. The project name is visible in Shared Services Console. <strong>Example:</strong> DevBIPlus Proj</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| type      | Connection types:  
  - FileSystem for the file system connection  
  - Application for the application connection registered with Shared Services |

**Target**

Defines the destination for the migration. You must define one destination per task.

**Table 5  Target Attributes**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
</table>
| application | Name with which the application is registered. The application name is visible in Shared Services Console.  
  *Example:* HAVAAPP1 |
| filePath | Directory where artifacts are stored on the file system.  
  *Example:* filePath="/Essbase.Sample.Basic"  
  *Note:* When an .mdf file is generated from the UI, the path is a relative path to the working folder. If the .mdf file is not in the working folder, you can edit the .mdf file to overwrite the relative path with an absolute path. |
| product | Product code for the application that is registered with Shared Services.  
  *Examples:*  
  - HUB (Shared Services)  
  - HAVA (Reporting and Analysis)  
  - ESBAPP (Essbase)  
  - HFM (Financial Management)  
  - HP (Planning)  
  - BPMA (Performance Management Architect)  
  - CALC (Calculation Manager)  
  - HPS (Performance Scorecard)  
  - HPM (Profitability and Cost Management) |
| project | Name of the Shared Services Application Group to which the application belongs. The project name is visible in Shared Services Console.  
  *Example:* DevBIPlus_Proj |

**Artifact**

Filter used for the current migration.
Table 6  Artifact Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
</table>
| parentPath  | Top-level directory where artifact or data for the migration is stored. See the appendixes at the end of this guide for information on product directory structures.  
  **Example:** /Data Analysis & Report Creation  
  **Caution:** If the parent path directory contains an ampersand (&) character, replace it with "&amp;" in the migration definition file (see example below).  
  **Note:** If `recursive="true"`, all artifacts contained in the subdirectories within this directory are imported.  
  **Note:** The `pattern` attribute is required for all products. |
| pattern     | Artifact-selection criteria.  
  Specify the name of an artifact to import or use an * (asterisk) to import all artifacts that match filter conditions.  
  **Example:** *  
  **Note:** The `pattern` attribute is required for all products. |
| recursive   | Whether the migration should be performed on artifacts stored in subdirectories.  
  **Example:** true  
  **Note:** The `recursive` attribute is optional. |

**Options**

Options are product-specific. Refer to the appendixes at the end of this guide for the import and export options that you can set. The source or destination interprets the options to understand the artifacts being migrated.

If options are not set, the default options set in Shared Services Registry are used.

Table 7  Options Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
</table>
| option    | Name used to override the option name defined in Shared Services Registry.  
  **Example:** ExportJobOutput |
| value     | Value used to override the option value defined in Shared Services Registry.  
  **Example:** true |

**Running Lifecycle Management Utility**

Lifecycle Management Utility offers the following options:

- Takes the name of the migration definition file
- Helps you estimate the number of artifacts in a proposed migration
- Enables you to migrate artifacts to or from a file system
Errors encountered during migration are defined by logging.xml in the MIDDLEWARE_HOME/user_projects/epmsystem1/Config/FoundationServices directory and the log.directory property. Monitor the error log to understand issues encountered during the migration process.

To run Lifecycle Management Utility:

1. If migrating, back up the destination environment.
   See Oracle Enterprise Performance Management System Backup and Recovery Guide.
2. Open a command prompt window.
3. Change the directory to the location of Utility.bat (Windows) or Utility.sh (UNIX); for example, MIDDLEWARE_HOME/user_projects/epmsystem1/bin.
4. Execute Lifecycle Management Utility by entering the following text at the command prompt:

```
Utility.bat c:/lcm/lcmdefinition.xml
```

where c:/lcm/lcmdefinition.xml is the location of the migration definition file

### Running Lifecycle Management Utility on a Non-Foundation Services Machine

Apart from the machine where Oracle Hyperion Foundation Services is configured, Lifecycle Management Utility migrations can only be run from a machine where EPM System products are configured as part of a distributed EPM System configuration. Lifecycle Management migrations cannot be run from standalone client machines that do not have any EPM System products installed.

To run Lifecycle Management Utility on a non-Foundation Services machine:

1. Copy Utility.bat or Utility.sh from:

```
EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/bin
```

to

```
MIDDLEWARE_HOME/user_projects/epmsystem1/bin
```

2. Navigate to MIDDLEWARE_HOME/user_projects/epmsystem1/bin and execute Utility.bat or Utility.sh.
Additional Command-line Arguments

Subtopics

- [-estimate]: Estimates the Number of Artifacts in a Migration
- [-b]: Specifies the Base Path
- [-ls]: Lists EPM System Contents

Note: By default, Lifecycle Management Utility contains the [-d]: Defer Validations and [-f]: Fully Execute Tasks arguments. This means that after a failed task, Lifecycle Management Utility will continue with the next task. Validation of a task’s source and target connections are performed only when the task is executed and not before starting the task execution.

[-estimate]: Estimates the Number of Artifacts in a Migration

To estimate the number of artifacts in a proposed migration, Lifecycle Management provides the following optional argument:

Utility.bat c:/lcm/lcmdefinition.xml [-estimate]

If the [-estimate] argument is specified, then the number of artifacts in the migration is computed by communicating with the appropriate source(s) and/or destination(s) specified in the migration definition. The report contains, per task specified in the migration definition, the total number of artifacts, total accumulated size of artifacts, and a list of artifacts and directories that will participate in the migration. You can customize the location of this report by updating the report.folder_path property. See “Editing Migration Properties” on page 51.

[-b]: Specifies the Base Path

The [-b] command-line argument instructs Lifecycle Management Utility to use the base path relative to where the file system path is set (the file system is the location where all exports and imports are stored).

utility.bat c:/lcm/lcmdefinition.xml [-b path]

The path that is specified can be absolute or relative to the current working directory (it can also include “.” and “..” relative to an absolute path). If no base path is specified, it uses the directory location of the MDF file (which is not necessarily the directory where Lifecycle Management Utility exists).

The following are some examples:

c:\import_export\HPFullApplicationSuite

c:\Oracle\Middleware\user_projects\epmsystem1\import_export\HPFullApplicationSuite

Note: If the specified path does not exist, Lifecycle Management will display an error.
[-ls]: Lists EPM System Contents

The [-ls] command-line argument lists the artifacts in a migration defined by a migration definition file. It lists the artifacts of both the source and the target system. In an export MDF, for example, the source is the EPM System application and the target is the file system.

Windows:
utility.bat importMDF.xml -ls
utility.bat exportMDF.xml -ls

UNIX:
utility.sh importMDF.xml -ls
utility.sh exportMDF.xml -ls

The resulting output is two files; one for the source and one for the destination:

- `<mdf name>_application name.txt`
- `<mdf name>_file system folder name.txt`

You can compare the output using a third-party, file-compare utility. This helps to determine the success of the migration.

Output file details:

- Artifact names
- Artifact types
- Path
- Summary of the content summary

Sample content summary:

```
CONNECTION NAME = AppConnection2
CONNECTION TYPE = Application

APPLICATION RESOURCE DETAILS -
APPLICATION ID = 1111
PRODUCT NAME - Hyperion Shared Services
PRODUCT CODE = HUB
PRODUCT VERSION = 11.1.2.2
PROJECT NAME = Foundation

TOTAL ARTIFACT: 48
Aggregated Roles 1 (artifact count by type)
Assigned Roles 15
Groups 1
Process Definition 15
Taskflow ACL 15
Users 1
```

The output files are created in the same path as the MDF file and replace any existing files with the same names. You can specify a path for the output files as follows:

```
utility.sh c:\importMDF.xml -ls -p c:\compare\```
For MDFs with multiple tasks, different sets of list structures are created for each task, and the files are prefixed with the task number:

- `<mdf name>_application name_<tasknumber>.txt`
- `<mdf name>_file system folder name_<tasknumber>.txt`
About Deployment Metadata Artifacts

Deployment metadata artifacts contain physical server names and configuration information for the deployment. This information should not be migrated from one environment to another (for example, from Dev to Test). Migrating this data would corrupt the configuration information on the destination environment and would make the system unusable. The use case for exporting and importing deployment metadata artifacts is only for archiving configuration information in a version control system to monitor changes in the configuration.

You can use Lifecycle Management to edit these types of deployment metadata artifacts:

- Registration—Registration artifacts enable you to edit application configuration information on a given environment (for example, if updating a product from non-SSL to SSL, you must edit the callback URLs in the Registration instance files).
- Shared Services Registry—Oracle Hyperion Shared Services Registry artifacts enable you to view registry content and export registry data to the file system where it can be edited and reimported.

Caution! Do not use Lifecycle Management to migrate deployment metadata artifacts from one environment to another. Use Lifecycle Management to export deployment metadata artifacts to the file system, use a text editor to edit the artifacts, and then use Lifecycle Management to import the edited artifacts back into Shared Services.

For a listing of deployment metadata artifacts, see “Deployment Metadata Artifact Listing” on page 70.
Deployment Metadata Roles Requirement

Users performing Lifecycle Management operations for deployment metadata must be assigned the following roles:

- LCM Administrator
- Shared Services Administrator

See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

Deployment Metadata Export and Import Prerequisites

- Install and configure Shared Services and EPM System products and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.
- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator and Shared Services Administrator roles. See Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

Deployment Metadata Artifact Listing

Subtopics

- About the Registration Artifacts Artifact Listing
- Registration Artifacts
- Shared Services Registry Artifacts

Deployment metadata artifacts are listed in the Foundation application group in Shared Services Console. Users must be assigned these roles to view deployment metadata artifacts:

- LCM Administrator
- Shared Services Administrator

Note: The artifacts displayed in Shared Services Console vary by implementation.

About the Registration Artifacts Artifact Listing

Note the following about the artifact listing:

- Artifact—Artifact name
- Description—Artifact description
- Last Modified Time—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
• **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.

• **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.

• **Dependencies**—Lists artifact dependencies

## Registration Artifacts

The Registration directory contains products, applications, and application groups artifacts.

### Table 8  Registration Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products</td>
<td>In EPM System, an application type, such as Planning or Essbase.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Applications</td>
<td>Instances of EPM System products that are registered with Shared Services.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

## Shared Services Registry Artifacts

The Shared Services Registry directory contains Shared Services Registry properties and product registry artifacts from previous releases.

## Deployment Metadata Migration Considerations

When importing an edited database password under deployment metadata, precede the property name with “ENCR” so that the password gets stored in an encrypted format.

For example, edit the corresponding line in `component.Properties` as follows:

```plaintext
ENCR:key1=plaintext
```

## Deployment Metadata Export and Import Options

There are no export or import options for Shared Services Registry artifacts. All deployment metadata artifacts must be exported to and imported from the file system. By default, deployment metadata artifacts are updated or merged.
Lifecycle Management Log Files

Lifecycle Management log files for deployment metadata are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.
In This Appendix

- About Calculation Manager Artifacts ................................................................. 73
- Calculation Manager Roles Requirement .......................................................... 73
- Calculation Manager Migration Prerequisites ................................................... 74
- Calculation Manager Artifact Listing ............................................................... 74
- Calculation Manager Application Migrations and Cross-Product Artifact Dependencies .............. 76
- Migration Export and Import Options ............................................................... 76
- Sample Migration Definition Files .................................................................... 77
- Lifecycle Management Log Files ....................................................................... 77

About Calculation Manager Artifacts

Use Lifecycle Management to migrate these types of Calculation Manager artifacts:

- Rules
- Rule Sets
- Formulas
- Scripts
- Templates

For a listing of Calculation Manager artifacts, see “Calculation Manager Artifact Listing” on page 74.

Calculation Manager Roles Requirement

Users performing Lifecycle Management operations for Calculation Manager must be assigned the following roles:

- LCM Administrator
- Calculation Manager Administrator
- Any application level roles
Calculation Manager Migration Prerequisites

- Install and configure Shared Services and Calculation Manager and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator role, a Calculation Manager Administrator role, and any application level roles. See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

- Before migrating the product-specific artifacts, migrate the Shared Services Native Directory artifacts (users, groups, and provisioning). See “Migrating Native Directory (Security)” on page 47. For a listing of Shared Services Native Directory artifacts, see Appendix L, “Shared Services and Lifecycle Management.”

- Migrate the Financial Management or Planning Performance Management Architect application views (and plan types) and make sure they have the same application name as the application name in the source. For more information about Performance Management Architect artifacts, see Appendix G, “Performance Management Architect and Lifecycle Management.”

- Planning, Financial Management, and Essbase applications must be created with the same name as the name in the source before importing their artifacts into Calculation Manager.

Calculation Manager Artifact Listing

Subtopics

- About the Artifact Listing
- Rules Artifacts
- Rule Sets Artifacts
- Formulas Artifacts
- Scripts Artifacts
- Templates Artifacts

Calculation Manager artifacts are listed under the Calculation Manager node in the Foundation application group in Shared Services Console.

About the Artifact Listing

Note the following about the artifact listing:

- Artifact—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies

### Rules Artifacts

Table 9  Rules Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rules</td>
<td>Objects that can contain templates and calculations that are grouped in components</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

### Rule Sets Artifacts

Table 10  Rule Sets Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Sets</td>
<td>Objects that contain rules and other rulesets that can be calculated simultaneously or sequentially</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

### Formulas Artifacts

Table 11  Formulas Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formulas</td>
<td>Component that can be used in business rules and templates and contains calculation statements that users can write or design using members and functions, and optionally, conditional statements</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>
Scripts Artifacts

Table 12  Scripts Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scripts</td>
<td>Component that can be used in business rules and templates and contains only Visual Basic (for Financial Management) or Essbase (for Planning and Essbase) calc script statements</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

Templates Artifacts

Table 13  Templates Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Templates</td>
<td>User created components that perform a calculation or calculations</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

Calculation Manager Application Migrations and Cross-Product Artifact Dependencies

When migrating Calculation Manager applications from one environment to another (development to test or test to production), there are cross-product artifact dependencies.

Calculation Manager requires the following artifacts from other products to be migrated along with the Calculation Manager-specific artifacts.

- Performance Management Architect
- Shared Services Native Directory (users, groups, and provisioning)
- Essbase
- Classic Planning
- Classic Financial Management

Migration Export and Import Options

During import, Calculation Manager artifacts will replace any existing artifacts on the destination environment. There is no option to merge artifacts.

Calculation Manager has no product-specific export or import options.
Sample Migration Definition Files

The product code used in the migration definition files for Calculation Manager is CALC. All sample migration definition files are provided in $EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample$.

Exporting to the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="Application" product="CALC" project="Foundation"
     application="Calculation Manager" />
    <Target type="FileSystem" filePath="/CALC-Calculation Manager" />
    <Artifact recursive="true" parentPath="/Consolidation" pattern="*" />
    <Artifact recursive="true" parentPath="/Essbase" pattern="*" />
    <Artifact recursive="true" parentPath="/Planning" pattern="*" />
  </Task>
</Package>
```

Importing From the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="FileSystem" filePath="/CALC-Calculation Manager" />
    <Target type="Application" product="CALC" project="Foundation"
     application="Calculation Manager" />
    <Artifact recursive="true" parentPath="/Consolidation" pattern="*" />
    <Artifact recursive="true" parentPath="/Essbase" pattern="*" />
    <Artifact recursive="true" parentPath="/Planning" pattern="*" />
  </Task>
</Package>
```

Lifecycle Management Log Files

Lifecycle Management log files for Calculation Manager are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.
About ERP Integrator Artifacts

Use Lifecycle Management to migrate these types of ERP Integrator artifacts:

- Application Category Mapping
- Application Definition
- Application Period Mapping
- Batch Definition
- Data Load Mapping
- Data Load Rule
- HR Data Load Rule
- Import Format
- Location
- Metadata Rule
- Write-Back Mapping
- Write-Back Rule
- Source Accounting Entity
- Source Period Mapping
- Category Mapping
- Period Mapping
● Source Adapter

For a description of these ERP Integrator artifacts, see “ERP Integrator Artifact Listing” on page 80.

**ERP Integrator Roles Requirement**

Users performing Lifecycle Management operations for ERP Integrator must be assigned the following roles:

- ERPI Application Administrator
- LCM Administrator

See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

**ERP Integrator Migration Prerequisites**

- Install and configure Shared Services and ERP Integrator and verify that they are running. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide*.
- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator and ERPI Application Administrator roles. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.
- Before migrating the ERP Integrator product-specific artifacts, migrate the Shared Services Native Directory artifacts (users, groups, and provisioning). See “Migrating Native Directory (Security)” on page 47. For a listing of Shared Services native directory artifacts, see Appendix L, “Shared Services and Lifecycle Management.”
- Before migrating ERP Integrator product specific artifacts, manually create all the source system registrations in the target environment and initialize them.

**ERP Integrator Artifact Listing**

Subtopics

- About the Artifact Listing
- Application Data
- Global Setup Artifacts

ERP Integrator artifacts are listed under the ERP Integrator node in the FDM application group in Shared Services Console.

**Note:** The artifacts displayed in Shared Services Console vary by implementation.
About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was last modified. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, User Preferences artifacts also require that User Variables artifacts be migrated.

Application Data

The Application Data directory contains artifacts for Consolidation applications and Planning applications.

Table 14 Application Data

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Category Mapping</td>
<td>Categorizes and maps source system data to a specific target Scenario dimension by application</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Application Definition, Category Mapping</td>
</tr>
<tr>
<td>Application Definition</td>
<td>Definition of the target application</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Application Period Mapping</td>
<td>Period mapping between the source ERP Integrator system periods and the target EPM System application periods</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Application Definition, Period Mapping</td>
</tr>
<tr>
<td>Batch Definition</td>
<td>Definition and parameters for ERP Integrator Batch processing</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Data Load Rule, HR Data Load Rule, Write-Back Rule, Metadata Rule</td>
</tr>
<tr>
<td>Data Load Mapping</td>
<td>Relationships between source dimension members and target dimension members within a single dimension</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Location</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>-----------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Data Load Rule</td>
<td>Rules to extract data from the ERP Integrator source system</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Location</td>
</tr>
<tr>
<td>HR Data Load Rule</td>
<td>Rules to populate data and metadata in Oracle Hyperion Public Sector Planning and Budgeting applications</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Location</td>
</tr>
<tr>
<td>Import Format</td>
<td>Mappings of source segments or chart fields to target application dimensions</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Application Definition, Source Adaptor, Source Accounting Entity</td>
</tr>
<tr>
<td>Location</td>
<td>Mappings of source accounting entities and target applications</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Import Format</td>
</tr>
<tr>
<td>Metadata Rule</td>
<td>Rules to load source system dimension members into target EPM System applications</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Location</td>
</tr>
<tr>
<td>Write-Back Mapping</td>
<td>Mappings to replace outgoing EPM System dimension members with source segment members during write back to source ERP Integrator systems</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Location</td>
</tr>
<tr>
<td>Write-Back Rule</td>
<td>Rules to extract budget data from an application to a general ledger instance and a ledger source</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Location</td>
</tr>
</tbody>
</table>

**Global Setup Artifacts**

The Global Setup directory contains source accounting entities, source period mappings, category mappings, period mappings, and source adaptor artifacts.
Table 15  Global Setup Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Accounting Entity</td>
<td>Ledgers or business units used in the integration</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Source Period Mapping</td>
<td>Period mapping between the source ERP Integrator system periods and the target EPM System application periods organized by source system</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Period Mapping</td>
</tr>
<tr>
<td>Category Mapping</td>
<td>Globally categorizes and maps source system data to a specific target EPM System Scenario dimension member</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Period Mapping</td>
<td>Global period mapping between the source ERP Integrator system periods and the target EPM System application periods</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Source Adapter</td>
<td>Adapters to pull data from external systems</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>None</td>
</tr>
</tbody>
</table>

**ERP Integrator Migration Considerations**

- The source system must be initialized in both the source system and ERP Integrator.
- The target application must be present in all the respective target products.

**ERP Integrator Application Migrations and Cross-Product Artifact Dependencies**

When migrating ERP Integrator artifacts from one environment to another (development to test or test to production), ERP Integrator requires artifacts from other products to be migrated along with the ERP Integrator-specific artifacts.

ERP Integrator Classic cross-product artifacts include Shared Services Native Directory (users, groups, and provisioning).
Migration Export and Import Options

During import, ERP Integrator artifacts will validate any existing artifacts on the destination environment.

ERP Integrator import option:

- **Skip Validation** — Skips the validation of target dimension members in the destination location during import.

**Note:** To access export and import options, launch Shared Services Console and select Administration, and then Migration Options.

Sample Migration Definition Files

The sample migration definition files provided are for ERP Integrator application migrations. The product code used in the migration definition files for ERP Integrator is AIF. All sample migration definition files are provided in `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample`.

**Exporting to the File System**

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
    <LOCALE>en</LOCALE>
    <User name="" password="" />
    <Task>
        <Source type="Application" product="AIF" project="FDM" application="ERP Integrator" />
        <Target type="FileSystem" filePath="/ERPI-ERP Integrator" />
        <Artifact recursive="true" parentPath="/Global Setup Artifacts" pattern="*" />
    </Task>
</Package>
```

**Importing to the File System**

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
    <LOCALE>en</LOCALE>
    <User name="" password="" />
    <Task>
        <Source type="FileSystem" filePath="/ERPI-ERP Integrator" />
        <Target type="Application" product="AIF" project="FDM" application="ERP Integrator" />
        <Artifact recursive="true" parentPath="/Global Setup Artifacts" pattern="*" />
    </Task>
</Package>
```
Lifecycle Management Log Files

Lifecycle Management log files for Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.
About Essbase Artifacts

Use Lifecycle Management to migrate these types of Essbase artifacts:

- Substitution Variables
- Rule Files
- Calculation Scripts
- Report Scripts
- Excel Files
- Location Aliases
- Security Filters
- Text Files
- Database Outlines
- Data

For a listing and description of Essbase artifacts, see “Essbase Artifact Listing” on page 88.

Essbase Roles Requirement

Users performing Lifecycle Management operations for Essbase must be assigned the following roles:
- LCM Administrator
- Server Access
- Calc
- Database Manager

**Note:** The Server Access role is needed at the Essbase server level. At the application level, the Calc role is required to export source application artifacts, and the Database Manager role is required to import into destination applications.

See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

**Essbase Migration Prerequisites**

- Install and configure Shared Services and Essbase and verify that they are running. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide*.
- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator, Server Access, Calc, and Database Manager roles. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.
- Essbase Classic applications—Before migrating security filters, you must migrate Shared Services Native Directory (users, groups, and provisioning). See “Migrating Native Directory (Security)” on page 47. For a listing of Shared Services Native Directory artifacts, see Appendix L, “Shared Services and Lifecycle Management.”

  **Note:** To use Lifecycle Management for Planning or Essbase, Essbase must use Shared Services Native Directory and not a legacy security mode.

- Before exporting Essbase data, ensure that the database is set to read-only mode to disallow any updates until the export process is complete.
- Before exporting data artifacts, make sure to load data into the database; otherwise, the data migration will fail since the artifacts will not have any value.

**Essbase Artifact Listing**

**Subtopics**

- About the Artifact Listing
- Essbase Server Artifacts
- Essbase Application Artifacts
- Essbase Database Artifacts

Essbase artifacts are listed in the Essbase application group in Shared Services Console.
Note: The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, Essbase Security Filters artifacts also require that Shared Services security artifacts be migrated.

Essbase Server Artifacts

The Essbase Server directory contains substitution variable artifacts.

Table 16  Essbase Server Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Substitution Variables</td>
<td>Global placeholders for regularly changing information</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

Essbase Application Artifacts

Each application directory (for example, Demo) contains application-specific substitution variable artifacts.

Table 17  Essbase Application Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Substitution Variables</td>
<td>Global placeholders for regularly changing information</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>
## Essbase Database Artifacts

Each Essbase application contains one or more database directories (for example, Sample.Basic) which, in turn, contain database-specific artifacts.

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Files</td>
<td>Sets of operations that Essbase performs on data values or on dimensions and members when it processes a data source</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>Calculation Scripts</td>
<td>A set of commands that defines how a database is consolidated or aggregated. A calculation script may also contain commands that specify allocation and other calculation rules separate from the consolidation process.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT</td>
<td>None</td>
</tr>
<tr>
<td>Report Scripts</td>
<td>Text files containing Essbase Report Writer commands that generate one or more production reports</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>None</td>
</tr>
<tr>
<td>Excel Files</td>
<td>External spreadsheet files that you can associate with data cells in Essbase</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>None</td>
</tr>
<tr>
<td>Substitution Variables</td>
<td>Global placeholders for regularly changing information</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>-------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Location Aliases</td>
<td>Descriptors that identify a data source. The location alias specifies a server, application, database, user name, and password. Location aliases are set by DBAs at the database level using Oracle Essbase Administration Services, ESSCMD, or the API.</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Security Filters</td>
<td>Restrictions that control security access to data values or cells</td>
<td>No</td>
<td>No</td>
<td>Yes—CSV</td>
<td>Shared Services security artifacts</td>
</tr>
<tr>
<td>Text Files</td>
<td>Text files used for loading data into Essbase cubes</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT</td>
<td>None</td>
</tr>
<tr>
<td>Database Outline</td>
<td>Cube Outline file</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>Data</td>
<td>All stored data, whether it is at the input member or aggregated/consolidated at the parent level; for example, Stored Data, Dynamic Calc and Store.</td>
<td>No</td>
<td>No</td>
<td>Yes—TXT</td>
<td>Database Outline</td>
</tr>
</tbody>
</table>

**Essbase Migration Considerations**

- Certain text files (for example, MaxL script *.mxl, MaxL *.msh, and MDX script *.mdx) cannot be migrated using Lifecycle Management.
- Triggers cannot be migrated using Lifecycle Management. Instead, they can be migrated using MaxL.
- Partition definitions cannot be migrated using Lifecycle Management. Instead, they can be migrated using MaxL.
- Custom-defined Macros and Functions cannot be migrated using Lifecycle Management. Instead, they can be migrated using MaxL.
- Lifecycle Management does not prevent the migration of BSO artifacts into an ASO application and, conversely, ASO application artifacts to a BSO database as long as the migration does not require creation of a new database at the destination. Outline is the restriction. Hence, data migration, which is dependent on the Outline, also cannot be migrated.
- Oracle Essbase Spreadsheet Add-in supports Substitution Variables at the Server level.
- To use Lifecycle Management for Essbase, Essbase must be in Shared Services mode.

Essbase destination application considerations:
- The application can be predefined in Administration Services, or you can specify the application name in the import.xml file and execute the migration from CLU.
- Database will be created automatically if it does not exist
- Data source and destination names must be the same
- If a cube does not exist and is automatically created, the outline is forcibly overwritten even if the 'overwrite' flag is not selected.
- If an empty outline exists, the 'Default Calc' artifact will not display in the artifact listing under the Calc Scripts directory.
- If Essbase does not exist in the target environment, Lifecycle Management will create an application shell.

**Essbase Application Migrations and Cross-Product Artifact Dependencies**

When migrating Essbase applications from one environment to another (development to test or test to production), there are cross-product artifact dependencies. Essbase requires artifacts from other products to be migrated along with the Essbase-specific artifacts.

- Essbase Classic cross-product artifacts:
  - Shared Services security (users, groups, and provisioning)
  - **Optional**: Reporting and Analysis (Financial Reporting, Web Analysis, and Interactive Reporting)

- Essbase Performance Management Architect cross-product artifacts:
  - Performance Management Architect
  - Shared Services security (users, groups, and provisioning)
  - **Optional**: Reporting and Analysis (Financial Reporting, Web Analysis, and Interactive Reporting)
Migration Export and Import Options

Subtopics

- Migration Export Options
- Migration Import Options

Migration Export Options

Essbase has no product-specific export options.

Migration Import Options

During import, Essbase artifacts will replace any existing artifacts on the destination environment. There is no option to merge artifacts.

Essbase import options:

- **Overwrite Artifacts**—Select to overwrite all artifacts in the destination location
- **Restructure Cube**—Choose from the following options:
  - **Retain cube data**—Retains the data in the cube when restructuring the cube outline
  - **Discard cube data**—Discards the data in the cube when restructuring the cube outline
  - **Keep only input data**—Retains only the input data when restructuring the cube outline
  - **Keep only 0 level data**—Retains only level 0 data when restructuring the cube outline

**Note:** To access export and import options, launch Shared Services Console and select **Administration**, and then **Migration Options**.

Sample Migration Definition Files

The product code used in the migration definition files for Essbase is **ESBAPP**. All sample migration definition files are provided in $EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample$.

Exporting to the File System

```xml
<xml version="1.0" encoding="UTF-8" ?>
  <Package>
    <LOCALE>en_US</LOCALE>
    <User name="" password="" />
    <Task>
      <Source type="Application" product="ESBAPP" project="EssbaseCluster-1" application="Sample" />
      <Target type="FileSystem" filePath="/ESB-Sample" />
      <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
      <Artifact recursive="true" parentPath="/Databases" pattern="*" />
    </Task>
  </Package>
</xml>
```
Importing from the File System

```xml
<xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="FileSystem" filePath="/ESB-Sample" />
    <Target type="Application" product="ESBAPP" project="EssbaseCluster-1" application="Sample" />
    <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
    <Artifact recursive="true" parentPath="/Databases" pattern="*" />
    <Artifact recursive="true" parentPath="/Substitution Variables" pattern="*" />
  </Task>
</Package>
```

Lifecycle Management Log Files

Lifecycle Management log files for Essbase are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*. 

94  Essbase and Lifecycle Management
About Financial Close Management Artifacts

Use Lifecycle Management to migrate repository content for these types of Financial Close Management artifacts:

- Period Dimension
- Year Dimension
- Alert Types
- Custom Attributes
- Integration Applications
- Integration Types
- Task Types
- Templates

For a description of these types of Financial Close Management artifacts, see “Financial Close Management Artifact Listing” on page 96.

Financial Close Management Roles Requirement

Users performing Lifecycle Management operations for Financial Close Management must be assigned the following roles:
FCM Administrator

LCM Administrator

See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

**Financial Close Management Migration Prerequisites**

- Install and configure Shared Services and Financial Close Management and verify that they are running. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide*.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator and FCM Administrator roles. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

- Before migrating the Financial Close Management product-specific artifacts, migrate the Shared Services Native Directory artifacts (users, groups, and provisioning). See “Migrating Native Directory (Security)” on page 47. For a listing of Shared Services native directory artifacts, see Appendix L, “Shared Services and Lifecycle Management.”

- Before migrating Integration Types, ensure that the following programs are up and running:
  - External asynchronous web services of any migrated system-automated Integration Types
  - Administration Server
  - Oracle SOA Suite Server

**Financial Close Management Artifact Listing**

**Subtopics**

- About the Artifact Listing
- Financial Close Management Artifacts

Financial Close Management artifacts are listed in the Financial Close Management application group in Shared Services Console.

**Note:** The artifacts displayed in Shared Services Console vary by implementation.

**About the Artifact Listing**

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, Financial Close Management Integration Types artifacts also require that Financial Close Management Integration Applications artifacts be migrated.

## Financial Close Management Artifacts

### Table 19  Financial Close Management Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Dimension</td>
<td>A hierarchical dimension that designates the time period to which the close activities apply; for example, a month or a quarter.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Year Dimension</td>
<td>A flat list that designates the year to which the close activities apply; for example, 2009, 2010, FY09, or FY10.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Alert Types</td>
<td>Categorize alerts into types such as hardware failure, software issues, and system failures.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Custom Attributes</td>
<td>Categorize templates, schedules, task types, and tasks.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Integration</td>
<td>Denote an external application with which Financial Close Management is</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Applications</td>
<td>integrated.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integration</td>
<td>A definition of a service provided by an application that is integrated</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Integration Applications</td>
</tr>
<tr>
<td>Types</td>
<td>with Financial Close Management.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Types</td>
<td>Identify and categorize tasks commonly performed during a close period, for</td>
<td>Yes</td>
<td>No</td>
<td>Yes—Zip</td>
<td>Period, Year, Alert Types,</td>
</tr>
<tr>
<td></td>
<td>example, Data Entry, or G/L Extract.</td>
<td></td>
<td></td>
<td></td>
<td>Custom Attributes,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Integration Applications,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Integration Types</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Templates</td>
<td>A set of tasks that are repeatable over close periods. Administrators can</td>
<td>Yes</td>
<td>No</td>
<td>Yes—Zip</td>
<td>Period, Year, Alert Types,</td>
</tr>
<tr>
<td></td>
<td>create templates for different types of close periods, such as monthly or</td>
<td></td>
<td></td>
<td></td>
<td>Custom Attributes,</td>
</tr>
<tr>
<td></td>
<td>quarterly.</td>
<td></td>
<td></td>
<td></td>
<td>Integration Applications,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Integration Types</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Task Types</td>
</tr>
</tbody>
</table>

**Financial Close Management Migration Considerations**

- All Financial Close Management users will be migrated as part of Shared Services.
- When migrating Financial Close Management artifacts, the Period, Year, Alert Type, Custom Attribute, and Integration Applications artifacts should be migrated first followed by Integration Types, then Task Types, and then Templates.
- The following Financial Close Management artifacts cannot be migrated:
  - Filters
  - User Preferences
  - Schedules
  - Alerts
Financial Close Management Application Migrations and Cross-Product Artifact Dependencies

Financial Close Management has no cross-product artifact dependencies.

Migration Export and Import Options

Subtopics
- Migration Export Options
- Migration Import Options

Migration Export Options

Financial Close Management has no product-specific export options.

Migration Import Options

Financial Close Management import option:

- Import Mode
  - Replace—Overwrites a selected artifact with an imported artifact
  - Replace All—Overwrites all the existing artifacts with the imported artifacts

Note: To access export and import options, launch Shared Services Console and select Administration, and then Migration Options.

Sample Migration Definition Files

The product code used in the migration definition files for Financial Close Management is FCC. All sample migration definition files are provided in EPM.ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample.

Exporting to the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="Application" product="FCC" project="Financial Close"
            application="Financial Close Management" />
    <Target type="FileSystem" filePath="/FCM-Financial Close Management" />
    <Artifact recursive="true" parentPath="/Alert Types" pattern="*" />
    <Artifact recursive="true" parentPath="/Custom Attributes" pattern="*" />
  </Task>
</Package>
```
Importing from the File System

<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="FileSystem" filePath="/FCM-Financial Close Management" />
    <Target type="Application" product="FCC" project="Financial Close" application="Financial Close Management" />
    <Artifact recursive="true" parentPath="/Alert Types" pattern="*" />
    <Artifact recursive="true" parentPath="/Custom Attributes" pattern="*" />
    <Artifact recursive="true" parentPath="/Integration Applications" pattern="*" />
    <Artifact recursive="true" parentPath="/Integration Types" pattern="*" />
    <Artifact recursive="true" parentPath="/Periods" pattern="*" />
    <Artifact recursive="true" parentPath="/Task Types" pattern="*" />
    <Artifact recursive="true" parentPath="/Templates" pattern="*" />
    <Artifact recursive="true" parentPath="/Years" pattern="*" />
  </Task>
</Package>

Lifecycle Management Log Files

Lifecycle Management log files for Oracle Hyperion Financial Close Management are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide
About Financial Management Artifacts

Use Lifecycle Management to migrate repository content for these types of Financial Management artifacts:

- Security
- Dimension
- Phased Submission
- Rules
- Documents
- Forms
- InterCompany
- Journals
- Member Lists

For a listing of Financial Management artifacts, see “Financial Management Artifact Listing” on page 103.
Financial Management Roles Requirement

Users performing Lifecycle Management operations for Financial Management must be assigned the following roles:

- LCM Administrator
- Application Administrator

See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

Financial Management Migration Prerequisites

- Install and configure Shared Services and Financial Management and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator and Application Administrator roles. See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

- Before migrating the Financial Management product-specific artifacts, migrate the Shared Services Native Directory artifacts (users, groups, and provisioning). See “Migrating Native Directory (Security)” on page 47. For a listing of Shared Services artifacts, see Appendix L, “Shared Services and Lifecycle Management.”

- Review the Financial Management artifact migration information in the following sections:
  - “Financial Management Classic Application Migrations” on page 102
  - “Financial Management Performance Management Architect Application Migrations” on page 102

Financial Management Classic Application Migrations

- Before migrating, applications must be created in native Financial Management.

- Financial Management Classic requires the following artifacts from other products to be migrated along with the Financial Management-specific artifacts:
  - Shared Services Native Directory (users, groups, and provisioning) and Taskflows
  - Reporting and Analysis (Financial Reporting and Web Analysis)

Financial Management Performance Management Architect Application Migrations

- For the first migration, the Performance Management Architect dimensions must be migrated and deployed first, then the non-dimensional artifacts can be migrated.
Financial Management Performance Management Architect requires the following artifacts from other products to be migrated along with the Financial Management-specific artifacts:

- Performance Management Architect
- Shared Services Native Directory (users, groups, and provisioning) and Taskflows
- Calculation Manager
- Reporting and Analysis (Financial Reporting and Web Analysis)

**Financial Management Artifact Listing**

**Subtopics**

- About the Artifact Listing
- Security Artifacts
- Dimensions Artifacts
- Phased Submission Artifacts
- Rules Artifacts
- Documents Artifacts
- Forms Artifacts
- InterCompany Artifacts
- Journals Artifacts
- Member Lists Artifacts

Financial Management artifacts are listed in the Financial Management application group in Shared Services Console.

Performance Management Architect enabled applications list dimensions under the EPMA node in the Foundation application group. All other non-dimensional artifacts are listed under the Financial Management application group.

*Note:* The artifacts displayed in Shared Services Console vary by implementation.

**About the Artifact Listing**

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
• **Dependencies**—Lists artifact dependencies. For example, Financial Management Events artifacts also require that Financial Management Calendars artifacts be migrated.

## Security Artifacts

### Table 20 Security Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security Class</td>
<td>An attribute for dimension members that specifies user permissions</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>None</td>
</tr>
<tr>
<td>Security Class Access</td>
<td>Privileges assigned to a user for a security class</td>
<td>No</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class</td>
</tr>
</tbody>
</table>

## Dimensions Artifacts

### Table 21 Dimensions Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenario</td>
<td>A dimension for classifying data (for example, Actuals, Budget, Forecast1, and Forecast2)</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Entity</td>
<td>A dimension representing organizational units. Examples: divisions, subsidiaries, plants, regions, products, or other financial reporting units.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Account</td>
<td>A dimension type that makes accounting intelligence available. Only one dimension can be defined as Accounts.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Period</td>
<td>A dimension representing time periods, such as quarters and months</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Year</td>
<td>A dimension representing the fiscal or calendar year for data</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>View</td>
<td>A dimension representing various modes of calendar intelligence; for example, Periodic, Year-to-Date, and Quarter-to-Date frequencies</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Value</td>
<td>A dimension representing the different types of values stored in your application, and can include the input currency, parent currency, adjustments, and consolidation detail such as proportion, elimination, and contribution detail</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>ICP</td>
<td>A dimension representing all intercompany balances that exist for an account. This is a reserved dimension that is used in combination with the Account dimension and any custom dimension.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Custom (1–4)</td>
<td>A dimension created and defined by users. Channel, product, department, project, or region could be custom dimensions.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>ConsolMethod</td>
<td>A metadata attribute</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Currency</td>
<td>A metadata attribute</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Appsettings</td>
<td>A metadata attribute</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Security Class</td>
</tr>
</tbody>
</table>

### Phased Submission Artifacts

**Note:** To migrate Phased Submission artifacts, both the Source and Destination must be phase submission enabled.

**Table 22** Phased Submission Artifact

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phased Submission</td>
<td>A stage of a process management unit</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>
### Rules Artifacts

Table 23  **Rules Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rules</td>
<td>Automates the calculation of data within an application</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Dimensions</td>
</tr>
</tbody>
</table>

### Documents Artifacts

Table 24  **Documents Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td>A file containing other files for the purpose of structuring a hierarchy</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Tasklists</td>
<td>A detailed status list of tasks for a particular user</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Links</td>
<td>A reference to a repository object. Links can reference folders, files, shortcuts, and other links.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class</td>
</tr>
<tr>
<td>Custom Documents</td>
<td>User-defined documents such as Microsoft Word or Excel documents</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Security Class</td>
</tr>
<tr>
<td>Data Explorer Reports</td>
<td>Displays information from data grids</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
<tr>
<td>Related Content</td>
<td>A link to content in another Oracle product, such as a report</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class</td>
</tr>
</tbody>
</table>
## Forms Artifacts

**Table 25  Forms Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Forms</td>
<td>Grid display on the Web that enables users to enter data into the database</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
<tr>
<td>Web Grids</td>
<td>An object for entering and displaying data</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
</tbody>
</table>

## InterCompany Artifacts

**Table 26  InterCompany Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICT matching template</td>
<td>Set of predefined components for intercompany matching processes</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
<tr>
<td>ICT reason codes</td>
<td>An explanation of an intercompany transaction’s status</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>None</td>
</tr>
<tr>
<td>Intercompany system report</td>
<td>Information from intercompany matching processes</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
<tr>
<td>ICT system reports</td>
<td>Information from intercompany transactions</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
<tr>
<td>IC Matching By Account</td>
<td>InterCompany matching reports based on accounts selected</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
<tr>
<td>IC Matching By Trans ID</td>
<td>InterCompany matching reports based on transaction ID</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
</tbody>
</table>
Journals Artifacts

Table 27  Journals Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal Templates</td>
<td>A journal function used to post adjustments that have common adjustment information for each period; for example, you can create a standard template that contains the common account IDs, entity IDs, or amounts, then use the template as the basis for many regular journals</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists, Journal Groups</td>
</tr>
<tr>
<td>Journal Groups</td>
<td>A user-defined element</td>
<td>No</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>None</td>
</tr>
<tr>
<td>Journal System reports</td>
<td>Displays information from journals</td>
<td>Yes</td>
<td>No</td>
<td>Yes—TXT, XML</td>
<td>Security Class, Dimensions, Member Lists</td>
</tr>
</tbody>
</table>

Member Lists Artifacts

Table 28  Member Lists Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Lists</td>
<td>A named group, system- or user-defined, that references members, functions, or member lists within a dimension</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Dimensions</td>
</tr>
</tbody>
</table>

Financial Management Migration Considerations

- EA Template migrations are not supported in Lifecycle Management.
- Favorites migrations are not supported in Lifecycle Management.
- Financial Management data migration is not supported in Lifecycle Management.
- You must manually select any necessary dependencies.
Financial Management Application Migrations and Cross-Product Artifact Dependencies

Financial Management has no cross-product artifact dependencies.

Migration Export and Import Options

Subtopics
- Migration Export Options
- Migration Import Options

Note: In previous releases, Shared Services Console provided an “Include Dependent Artifacts” option for Financial Management. This option is no longer available. Instead, you must manually select any necessary dependencies.

Migration Export Options

Financial Management has no product-specific export options.

Migration Import Options

During import, only Dimensions and Phased Submission artifacts have options to Replace or Merge existing artifacts on the destination environment. All other Financial Management artifacts will replace any existing artifacts during import.

Financial Management import options:
- Dimension Import Mode
  - Replace—Overwrites the artifacts with the imported artifacts
  - Merge—Merges the artifacts with the imported artifacts

  Note: This option is applicable to all dimensions defined in a migration.

- Phased Submission Assignment Import Mode
  - Replace—Overwrites the artifacts with the imported artifacts
  - Merge—Merges the artifacts with the imported artifacts

Note: To access export and import options, launch Shared Services Console and select Administration, and then Migration Options.
Sample Migration Definition Files

The sample migration definition files provided are for Financial Management Classic application migrations. The product code used in the migration definition files for Financial Management is HFM and the sample application is COMMA. All sample migration definition files are provided in EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample.

Exporting to the File System

```xml
<Package>
  <LOCALE>en</LOCALE>
  <User name="" password="" />
  <Task>
    <Target type="FileSystem" filePath="/HFM-LINSCRIPT" />
    <Source type="Application" product="HFM" project="Default Application Group" application="LINSCRIPT" />
    <Artifact recursive="true" parentPath="/Forms" pattern="*" />
    <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
    <Artifact recursive="true" parentPath="/Rules" pattern="*" />
    <Artifact recursive="true" parentPath="/Documents" pattern="*" />
    <Artifact recursive="true" parentPath="/Dimensions" pattern="*" />
    <Artifact recursive="true" parentPath="/InterCompany" pattern="*" />
    <Artifact recursive="true" parentPath="/Member Lists" pattern="*" />
    <Artifact recursive="true" parentPath="/Journals" pattern="*" />
    <Artifact recursive="true" parentPath="/Security" pattern="*" />
    <Artifact recursive="true" parentPath="/Phased Submission" pattern="*" />
  </Task>
</Package>
```

Importing from the File System

```xml
<Package>
  <LOCALE>en</LOCALE>
  <User name="" password="" />
  <Task>
    <Target type="Application" product="HFM" project="Default Application Group" application="LINSCRIPT" />
    <Source type="FileSystem" filePath="/HFM-LINSCRIPT" />
    <Artifact recursive="true" parentPath="/Security" pattern="*" />
    <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
    <Artifact recursive="true" parentPath="/Rules" pattern="*" />
    <Artifact recursive="true" parentPath="/Forms" pattern="*" />
    <Artifact recursive="true" parentPath="/Documents" pattern="*" />
    <Artifact recursive="true" parentPath="/Dimensions" pattern="*" />
    <Artifact recursive="true" parentPath="/InterCompany" pattern="*" />
    <Artifact recursive="true" parentPath="/Member Lists" pattern="*" />
    <Artifact recursive="true" parentPath="/Journals" pattern="*" />
    <Artifact recursive="true" parentPath="/Security" pattern="*" />
    <Artifact recursive="true" parentPath="/Phased Submission" pattern="*" />
  </Task>
</Package>
```
Lifecycle Management Log Files

Lifecycle Management log files for Financial Management are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.
In This Appendix

- About Performance Management Architect Artifacts ................................................. 113
- Performance Management Architect Roles Requirement ............................................ 113
- Performance Management Architect Migration Prerequisites ........................................ 114
- Performance Management Architect Artifact Listing .................................................. 114
- Performance Management Architect Migration Considerations...................................... 119
- Performance Management Architect Application Migrations and Cross-Product Artifact Dependencies ............................................................................................................. 120
- Migration Export and Import Options................................................................... 120
- Sample Migration Definition Files ...................................................................... 121
- Lifecycle Management Log Files........................................................................ 122

About Performance Management Architect Artifacts

Use Lifecycle Management to migrate repository content for these types of Performance Management Architect artifacts:

- Application Metadata
- Shared Library Dimensions
- Dimension Access
- Data Synchronization

For a listing of Performance Management Architect artifacts, see “Performance Management Architect Artifact Listing” on page 114.

Performance Management Architect Roles Requirement

Users performing Lifecycle Management operations for Performance Management Architect must be assigned the LCM Administrator role.

See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.
Performance Management Architect Migration

Prerequisites

- Install and configure Shared Services and Performance Management Architect and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator role. See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

- Before migrating the Performance Management Architect-specific artifacts, you must migrate the Shared Services Native Directory artifacts (users, groups, and provisioning). See “Migrating Native Directory (Security)” on page 47. For a listing of Shared Services Native Directory artifacts, see Appendix L, “Shared Services and Lifecycle Management."

Performance Management Architect Artifact Listing

Subtopics

- About the Artifact Listing
- Application Metadata Artifacts
- Shared Library Dimensions Artifacts
- Dimension Access Artifacts
- Data Synchronization Artifacts

Performance Management Architect artifacts are listed in the Foundation application group in Shared Services Console.

Note: The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- Artifact—Artifact name
- Description—Artifact description
- Last Modified Time—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- Last Modified User—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- Editable on the File System—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- Dependencies—Lists artifact dependencies
## Application Metadata Artifacts

The Application Metadata directory contains artifacts for Consolidation applications, Planning applications, Essbase applications, Profitability applications, and generic applications.

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consolidation Applications—Local Dimensions—Entity</td>
<td>A dimension representing organizational units; for example: divisions, subsidiaries, plants, regions, products, or other financial reporting units</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Consolidation Applications—Local Dimensions—Account</td>
<td>A dimension type that makes accounting intelligence available; only one dimension can be defined as Account</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Consolidation Applications—Application Properties</td>
<td>When an application is created, it takes on a default set of properties and property values; property values can be a string, integer, boolean, and so on</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Consolidation Applications—Import Profiles</td>
<td>Includes important information about the dimensions to import such as new dimensions, whether to merge or replace existing dimensions, and dimension properties</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Planning Applications—Local Dimensions—Entity</td>
<td>A dimension representing organizational units; for example, divisions, subsidiaries, plants, regions, products, or other financial reporting units</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Planning Applications—Local Dimensions—Account</td>
<td>A dimension type that makes accounting intelligence available; only one dimension can be defined as Account</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Planning Applications—Application Properties</td>
<td>When an application is created, it takes on a default set of properties and property values; property values can be a string, integer, boolean, and so on</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Planning Applications—Import Profiles</td>
<td>Important information about the dimensions to import such as new dimensions, whether to merge or replace existing dimensions, and dimension properties</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Essbase Applications—Local Dimensions—Entity</td>
<td>A dimension representing organizational units; for example, divisions, subsidiaries, plants, regions, products, or other financial reporting units</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Essbase Applications—Local Dimensions—Account</td>
<td>A dimension type that makes accounting intelligence available; only one dimension can be defined as Account</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Essbase Applications—Application Properties</td>
<td>When an application is created, it takes on a default set of properties and property values; property values can be a string, integer, boolean, and so on</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Essbase Applications—Import Profiles</td>
<td>Important information about the dimensions to import such as new dimensions, whether to merge or replace existing dimensions, and dimension properties</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Profitability Applications—Import Profiles</td>
<td>Important information about the dimensions to import such as new dimensions, whether to merge or replace existing dimensions, and dimension properties</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Profitability Applications—Local Dimensions</td>
<td>All dimension members that are local to an application</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Shared Library Dimensions, application settings</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
<td>--------------------</td>
<td>-------------------</td>
<td>-------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Profitability Applications—Profitability Settings</td>
<td>Application settings includes: Application level properties, Shared dimensions, Filters, and property overrides</td>
<td>No</td>
<td>No</td>
<td>Yes—format not published</td>
<td>Shared Library Dimensions</td>
</tr>
<tr>
<td>Generic Applications—Local Dimensions—Entity</td>
<td>A dimension representing organizational units; for example, divisions, subsidiaries, plants, regions, products, or other financial reporting units</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Generic Applications—Local Dimensions—Account</td>
<td>A dimension type that makes accounting intelligence available; only one dimension can be defined as Account</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Generic Applications—Application Properties</td>
<td>When an application is created, it takes on a default set of properties and property values; property values can be a string, integer, boolean, and so on</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Generic Applications—Import Profiles</td>
<td>Important information about the dimensions to import such as new dimensions, whether to merge or replace existing dimensions, and dimension properties</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

**Shared Library Dimensions Artifacts**

The Shared Library Dimensions directory contains shared library dimensions artifacts; for example, entity, account, and product.

**Table 30 Shared Library Dimensions Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity</td>
<td>A dimension representing organizational units; for example, divisions, subsidiaries, plants, regions, products, or other financial reporting units</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>
### Dimension Access Artifacts

The Dimension Access directory contains import profiles related to shared library dimensions.

**Table 31 Dimension Access Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Profiles</td>
<td>Important information about the dimensions to be imported such as new dimensions, whether to merge or replace existing dimensions, and dimension properties. Import profiles may be related to Flat File, Interface Tables, and Data Relationship Management based on how import profiles are created in the source.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

### Data Synchronization Artifacts

The Data Synchronization directory contains artifacts for synchronizations, mapping tables, external file definitions, and interface table definitions.

**Table 32 Data Synchronization Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>External File Definitions</td>
<td>External files that are used as sources in data synchronizations</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Filter Definitions</td>
<td>Required to restrict the set of members available from the source application. The filter is applied at synchronization execution against the source members.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Mapping Tables</td>
<td>Mappings that you can reuse in data synchronizations. If you have created mapping tables, you can insert them into a synchronization.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Interface Table Definitions</td>
<td>Database tables used to import data and metadata from external systems into Performance Management Architect</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Synchronizations</td>
<td>Enables you to synchronize and map data between EPM System applications, interface tables, and external files</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

Performance Management Architect Migration Considerations

The destination import result of the Shared or Local dimension state will depend on the artifact that is selected in the source. For considerations, review the following table:

Table 33  Shared and Local Dimension Migration Considerations

<table>
<thead>
<tr>
<th>Source Selection</th>
<th>Source Application Dimension State</th>
<th>Destination Action</th>
<th>If Application Properties is Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Metadata Only</td>
<td>Local</td>
<td>The dimension is imported as LOCAL into the destination application. The dimension is created, merged, or replaced. The Shared Dimensions Library is not affected.</td>
<td>Only Application-level properties are updated</td>
</tr>
<tr>
<td>Source Selection</td>
<td>Source Application Dimension State</td>
<td>Destination Action</td>
<td>If Application Properties is Selected</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------</td>
<td>---------------------</td>
<td>----------------------------------------</td>
</tr>
</tbody>
</table>
| Shared Dimensions Library Only | Shared | The dimension is created, merged, or replaced in the destination Shared Dimensions Library. The dimension is not included in any destination Application. | • Application-level properties are updated  
• Dimension is included in the selected application as SHARED  
• Dimension- and Member-level overrides for the application are imported. Overrides include member filters and application-specific property values. |

**Performance Management Architect Application Migrations and Cross-Product Artifact Dependencies**

When migrating Performance Management Architect applications from one environment to another (development to test or test to production), there are cross-product artifact dependencies. Performance Management Architect requires Shared Services Native Directory (users, groups, and provisioning) artifacts be migrated along with the Performance Management Architect-specific artifacts. See “Migrating Native Directory (Security)” on page 47.

**Migration Export and Import Options**

Subtopics
- Migration Export Options
- Migration Import Options

**Note:** In previous releases, Shared Services Console provided an “Include Dependent Artifacts” option for Performance Management Architect. This option is no longer available. Instead, you must manually select any necessary dependencies.

**Migration Export Options**

Performance Management Architect has no product-specific export options.

**Migration Import Options**

During import, all Performance Management Architect artifacts will replace any existing artifacts on the destination environment. The only exception is Dimensions artifacts, which provide options to Merge or Replace.
Performance Management Architect import option:

- **Dimension Import Mode**—Replaces any dimensions and properties in the destination with the extracted metadata from the source instance. The default value is Merge.

**Note:** The Merge and Replace options only work at the member hierarchy level and not at the application or dimension level. In cases where a property is updated at the member level, Merge or Replace will overwrite the property according to the source.

**Note:** To access export and import options, launch Shared Services Console and select Administration, and then Migration Options.

### Sample Migration Definition Files

The product code used in the migration definition files for Performance Management Architect is BPMA. All sample migration definition files are provided in `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample`.

#### Exporting to the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="Application" product="BPMA" project="Foundation" application="EPM Architect" />
    <Target type="FileSystem" filePath="/EPMA-EPM Architect" />
    <Artifact recursive="true" parentPath="/Application Metadata" pattern="*" />
    <Artifact recursive="true" parentPath="/Data Synchronization" pattern="*" />
    <Artifact recursive="true" parentPath="/Dimension Access" pattern="*" />
    <Artifact recursive="true" parentPath="/Shared Library Dimensions" pattern="*" />
  </Task>
</Package>
```

#### Importing From the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="FileSystem" filePath="/EPMA-EPM Architect" />
    <Target type="Application" product="BPMA" project="Foundation" application="EPM Architect" />
    <Artifact recursive="true" parentPath="/Application Metadata" pattern="*" />
    <Artifact recursive="true" parentPath="/Data Synchronization" pattern="*" />
    <Artifact recursive="true" parentPath="/Dimension Access" pattern="*" />
    <Artifact recursive="true" parentPath="/Shared Library Dimensions" pattern="*" />
  </Task>
</Package>
```
Lifecycle Management Log Files

Lifecycle Management log files for Performance Management Architect are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.
About Performance Scorecard Artifacts

Use Lifecycle Management to migrate these types of Performance Scorecard artifacts:

- Administrative Options
- Objects

For a listing of Performance Scorecard artifacts, see “Performance Scorecard Artifact Listing” on page 124.

Performance Scorecard Roles Requirement

Users performing Lifecycle Management operations for Performance Scorecard must be assigned the following roles:

- LCM Administrator
- HPS Power Manager
- Administrator

**Note:** The Administrator security role must be assigned to the Performance Scorecard application group.

See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*. 

---

In This Appendix

- About Performance Scorecard Artifacts ................................................................. 123
- Performance Scorecard Roles Requirement .......................................................... 123
- Performance Scorecard Migration Prerequisites .................................................. 124
- Performance Scorecard Artifact Listing ............................................................... 124
- Performance Scorecard Application Migrations and Cross-Product Artifact Dependencies ...... 125
- Migration Export and Import Options ................................................................. 126
- Sample Migration Definition Files ...................................................................... 126
- Lifecycle Management Log Files ......................................................................... 127
Performance Scorecard Migration Prerequisites

- Install and configure Shared Services and Performance Scorecard and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator and HPS Power Manager roles, and the Administrator role is assigned to the Performance Scorecard application group. See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

Performance Scorecard Artifact Listing

Subtopics

- About the Artifact Listing
- Administrative Options Artifacts
- Objects Artifacts

Performance Scorecard artifacts are listed in the Scorecard application group in Shared Services Console.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies
### Administrative Options Artifacts

Table 34  Administrative Options Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model Security</td>
<td>A CSV file containing information such as associated employee, user primary domain, and custom security role assignments that govern user and group access to Performance Scorecard metadata and data</td>
<td>No</td>
<td>No</td>
<td>Yes—CSV</td>
<td>None</td>
</tr>
</tbody>
</table>

**Note:** The Performance Scorecard accounts that users can migrate may also contain the following security settings assigned to accounts (displayed in the CSV file): SR=Security role; AE=Associated employee; PD=Primary domain; Object Name=security role name.

### Objects Artifacts

Table 35  Objects Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Model</td>
<td>An XML file or content string containing Performance Scorecard metadata</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
</tbody>
</table>

**Note:** You can only migrate an entire Performance Scorecard application model metadata object that is contained as an Application Model artifact. However, using the incremental export option enables you to export metadata objects that were changed since last export. The Application Model artifact export file cannot be reimported back to the source server.

### Performance Scorecard Application Migrations and Cross-Product Artifact Dependencies

Performance Scorecard has no cross-product artifact dependencies.
Migration Export and Import Options

Subtopics
- Migration Export Options
- Migration Import Options

Migration Export Options

Performance Scorecard export option:

- **Incremental Export**—Exports only artifacts that were changed since the last export operation was performed.

**Note:** To access export and import options, launch Shared Services Console and select **Administration**, and then **Migration Options**.

Migration Import Options

During import, Performance Scorecard artifacts will merge with any existing artifacts on the destination environment. Performance Scorecard has no product-specific import options.

Sample Migration Definition Files

The product code used in the migration definition files for Performance Scorecard is **HPS**. All sample migration definition files are provided in `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample`.

Exporting to the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="Application" product="HPS" project="Scorecard" application="Hyperion Performance Scorecard" />
    <Target type="FileSystem" filePath="/HPS-Hyperion Performance Scorecard" />
    <Artifact recursive="true" parentPath="/Administrative Options" pattern="*" />
    <Artifact recursive="true" parentPath="/Objects" pattern="*" />
  </Task>
</Package>
```

Importing from the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
```
Lifecycle Management Log Files

Lifecycle Management log files for Oracle Hyperion Performance Scorecard are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.
About Planning Artifacts

Use Lifecycle Management to migrate these types of Planning artifacts:

- Configuration
- Relational Data
- Global
- Plan Types
- Security

For a listing of Planning artifacts, see “Planning Artifact Listing” on page 131.

Planning Roles Requirement

Users performing Lifecycle Management operations for Planning must be assigned the following roles:

- LCM Administrator
- Planning Administrator
- Application Creator
The Planning Administrator role is required to perform Lifecycle Management listing, export, and import operations, and the Application Creator role is needed to create a Planning application.

See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

**Planning Migration Prerequisites**

- Install and configure Shared Services and Planning and verify that they are running. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide*.
- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator, Planning Administrator, and Application Creator roles. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.
- Ensure read access permissions are assigned to the LCM Administrator for task lists. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.
- Before migrating a Planning application, migrate the Shared Services Native Directory artifacts (users, groups, and provisioning). See “Migrating Native Directory (Security)” on page 47. For a listing of Shared Services Native Directory artifacts, see “Migrating Native Directory (Security)” on page 47.

**Note:** To use Lifecycle Management for Planning or Essbase, Essbase must use Shared Services Native Directory and not a legacy security mode.

- Planning Performance Management Architect application migrations—Before migrating non-dimensional artifacts, Performance Management Architect dimensions must be migrated first and 'deployed after import'. For a listing of Performance Management Architect artifacts, see Appendix G, “Performance Management Architect and Lifecycle Management.”
- The following application-level Calendar properties must match in both the source and destination applications:
  - Start year
  - Base time period (for example, 12 months, Quarters, and Custom)
  - Start month
- The Period Dimension members must match in both the source and destination applications. For example, if the Period dimension in the source has a “Quarter 1” member, a “Quarter 1” member must exist in the destination.
- Source and destination plan types must match (for example, if the source application has a plan type called Plan1, a Plan1 plan type must exist and in the destination application).
- Source and destination plan types must be assigned in the same order (for example, if the source application has Plan1 and Plan2, Plan1 and Plan2 plan types must appear in the same order in the destination application).
If the source has a “Single Currency” application type, then the destination application should be of the same type

Planning Artifact Listing

Subtopics

- About the Artifact Listing
- Configuration Artifacts
- Relational Data Artifacts
- Global Artifacts
- Plan Type Artifacts
- Security Artifacts

Planning artifacts are listed in the Planning application group in Shared Services Console.

Performance Management Architect enabled applications list dimensions under the EPMA node in the Foundation application group. All other non-dimensional artifacts are listed under the Planning application group.

Note: The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- Artifact—Artifact name
- Description—Artifact description
- Last Modified Time—If this parameter is supported, reflects the time the artifact was last modified. Some artifacts do not support the last modified time parameter.
- Last Modified User—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- Editable on the File System—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- Dependencies—Lists artifact dependencies. For example, User Preferences artifacts also require that User Variables artifacts be migrated.
## Configuration Artifacts

**Table 36  Configuration Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Load settings</td>
<td>Parameters that users can set to enable data to be loaded directly into an Essbase database</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>Associated Dimensions</td>
</tr>
<tr>
<td>Properties—Application Settings</td>
<td>Functionality that allows users to set preferences for such aspects as e-mail notification, alias tables, and display options</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>User Preferences</td>
<td>Preferences that users can set for applications, display, printing, and user variables</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>User Variables</td>
</tr>
<tr>
<td>User Variables</td>
<td>Dynamically render data forms based on a users member selection, displaying only the specified entity; for example, a user variable named Department displays specific departments and employees</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>Associated Dimensions</td>
</tr>
</tbody>
</table>

## Relational Data Artifacts

**Table 37  Relational Data Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Annotations</td>
<td>Comments associated with accounts that can be plain text or URL links</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>Account, Entity, Scenario, and Version Dimensions</td>
</tr>
<tr>
<td>Cell text</td>
<td>Text annotations associated with cells</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>-------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>Planning Units</td>
<td>A data slice at the intersection of a scenario, version, and entity; the basic unit for preparing, reviewing, annotating, and approving plan data</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>Entity, Scenario, and Version Dimensions</td>
</tr>
<tr>
<td>Supporting Detail</td>
<td>Calculations and assumptions from which the values of cells are derived</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Text Values</td>
<td>Text that is stored as data in cells whose data type is text</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

**Global Artifacts**

**Note:** Standard dimensions associated with more than one plan type are listed under Common Dimensions. This section also includes any associated attribute dimensions.

**Table 38  Global Artifacts**

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculation Manager Rulesets</td>
<td>Objects that contain rules and other rulesets that can be calculated simultaneously or sequentially</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Common Dimensions—Attribute</td>
<td>A type of dimension that enables analysis based on the attributes or qualities of dimension members. Associated with common standard dimensions.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Common Dimensions (Standard—Account)</td>
<td>A dimension type that makes accounting intelligence available. Only one dimension can be defined as Accounts</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

This artifact is not displayed under the Planning application for EPM Architect-based applications.

This artifact is not displayed under the Planning application for EPM Architect-based applications.
<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Dimensions (Standard—Currency)</td>
<td>A dimension representing currency</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Common Dimensions (Standard—Entity)</td>
<td>A dimension representing organizational units; for example: divisions, subsidiaries, plants, regions, products, or other financial reporting units</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Currency dimension gets loaded first</td>
</tr>
<tr>
<td>Common Dimensions (Standard—Period)</td>
<td>A dimension representing time periods, such as quarters and months</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Year</td>
</tr>
<tr>
<td>Common Dimensions (Standard—Request Dimension)</td>
<td>A dimension representing Budget Requests</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Common Dimensions (Standard—Scenario)</td>
<td>A dimension for classifying data; for example, Actuals, Budget, Forecast1, and Forecast2</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Period and Year dimensions, Exchange Rates</td>
</tr>
<tr>
<td>Common Dimensions (Standard—Version)</td>
<td>Possible outcome used within the context of a scenario of data; for example, Budget - Best Case and Budget - Worst Case where Budget is scenario and Best Case and Worst Case are versions</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Common Dimensions (Standard—Year)</td>
<td>A dimension representing the fiscal or calendar year for data</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Composite Forms</td>
<td>Displays members from several data forms simultaneously so you can; for example, enter data into one grid and see the results—such as Total Revenue—aggregated in another</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Associated Data Forms</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Custom Menus</td>
<td>Menus that administrators create that are company- or application-specific. Users can right-click a member and select a menu item to open a URL, data form, or workflow</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>If menu is of type Workflow, then Planning Units.</td>
</tr>
<tr>
<td>Decision Package</td>
<td>Proposals for new services, programs, business objectives, or outcomes in results based management or outcome based budgeting. Decision packages contain budget requests that identify and justify the costs involved in implementing the decision package.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>Decision Package Type</td>
</tr>
<tr>
<td>Decision Package Type</td>
<td>Templates that specify the fundamental data and behavior that define the kind of decision packages and budget requests that budget preparers can create.</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>Associated forms, mappings, dimensions</td>
</tr>
<tr>
<td>Exchange Rates</td>
<td>A numeric value for converting one currency to another; for example, to convert 1 USD into EUR, the exchange rate of 0.8936 is multiplied with the U.S. dollar. The European euro equivalent of $1 is 0.8936.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Currency, Period, and Year</td>
</tr>
<tr>
<td>Planning Unit Hierarchies</td>
<td>Specifies which application planning units and members are part of the budget process</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>Entity, Scenario, Version and other associated dimensions.</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>-------------------</td>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Report Mappings</td>
<td>Maps dimensions between Planning applications and reporting applications to enable reporting on Planning data in a reporting application, aggregations and queries on Smart Lists, and linking Planning data to multiple reporting applications for consolidations</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>Associated dimensions and Smart Lists.</td>
</tr>
<tr>
<td>Smart Lists</td>
<td>This artifact is not displayed under the Planning application for EPM Architect-based applications.</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Custom drop-down lists that users access from data form cells (instead of entering data)</td>
<td></td>
<td></td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>Spread Patterns</td>
<td>A custom spreading pattern that determines how data is distributed from a parent to its children. The pattern is available from the Mass Allocate and Grid Spread menus.</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Substitution Variables</td>
<td>Global placeholders for information that changes regularly</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>Task Lists</td>
<td>A detailed status list of tasks for a particular user</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>If task is of type Data Form, then associated Data Form. If task is of type Workflow, then Planning Units.</td>
</tr>
</tbody>
</table>

**Plan Type Artifacts**

Plan types are used to store Planning application information in the Essbase database. A separate database stores data for each plan type in the application, and contains information relevant to that plan type to optimize application design, size, and performance. The default Planning plan types include Plan1, Plan2, and Plan3.
<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Dimensions</td>
<td>A list of dimensions whose type enables analysis based on the attributes or qualities of dimension members</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Calc Scripts</td>
<td>A set of commands that define how a database is consolidated or aggregated. A calculation script may also contain commands that specify allocation and other calculation rules separate from the consolidation process.</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Calculation Manager Rules</td>
<td>Objects that can contain templates and calculations that are grouped in components</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Data Forms</td>
<td>A grid display that enables users to enter data into the database from an interface such as a Web browser, and to view and analyze data or related text. Certain dimension member values are fixed, giving users a specific view into the data. Data forms can include predefined data validation rules that help implement business policies and practices. Errors or warnings are generated on the data form if entered data violates a validation rule.</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Associated menus, user variables, and dimensions</td>
</tr>
<tr>
<td>Report Scripts</td>
<td>Text files containing Planning Report Writer commands that generate one or more production reports</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Rules files</td>
<td>Logical expressions or formulas that are created within an application to produce a preferred set of resulting values</td>
<td>Yes</td>
<td>No</td>
<td>No (Yes—Oracle Essbase Administration Services)</td>
<td>None</td>
</tr>
<tr>
<td>Standard Dimensions*</td>
<td>A list of dimensions associated with a single plan type</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Attribute Dimensions, if any</td>
</tr>
<tr>
<td>Substitution Variables</td>
<td>Global placeholders for information that changes regularly</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
</tbody>
</table>

**Security Artifacts**

**Note:** Access permissions are a set of operations that a user can perform on a resource.
### Planning Migration Considerations

- Planning data migration is not supported in Lifecycle Management.
- Some Planning artifacts have dependencies; for example, forms have dimension dependencies. Instead of migrating only the dimension members required for a form, Lifecycle Management migrates the entire dimension. See "Migrating Artifacts" on page 43.
- Lifecycle Management migration to and from Planning is a long-running operation.
- Essbase must be in Shared Services mode to use Lifecycle Management.
- Essbase artifacts display under the Planning application node.
- The source and destination applications must have exactly the same settings for Plan Type, Calendar, and Single- or Multi-currency.
- In previous releases, Shared Services Console provided an “Include Dependent Artifacts” option for Planning. This option is no longer available. Instead, you must manually select any necessary dependencies.
- If Planning does not exist in the target environment, Lifecycle Management will create an application shell.

### Planning Application Migrations and Cross-Product Artifact Dependencies

When migrating Planning applications from one environment to another (development to test or test to production), there are cross-product artifact dependencies. Planning requires artifacts from other products to be migrated along with the Planning-specific artifacts.

- Planning cross-product artifacts:
  - Shared Services Native Directory (users, groups, and provisioning)
  - Essbase
Note: Essbase artifacts displayed with the Planning artifacts are Rules files, Calc Scripts, and Substitution Variables.

- Optional: Reporting and Analysis (Financial Reporting and Web Analysis)

- Planning Performance Management Architect requires the following cross-product artifacts:
  - Performance Management Architect
  - Shared Services Native Directory (users, groups, and provisioning)
  - Oracle Hyperion Calculation Manager
  - Reporting and Analysis (Financial Reporting and Web Analysis)

Note: Essbase artifacts are displayed with the Planning artifacts.

Migration Export and Import Options

During import, Planning artifacts will replace any existing artifacts on the destination environment. There is no option to merge or delete artifacts during an import.

Planning has no product-specific export or import options.

Note: In previous releases, Shared Services Console provided an “Include Dependent Artifacts” option for Planning. This option is no longer available. Instead, you must manually select any necessary dependencies.

Sample Migration Definition Files

The sample migration definition files provided are for Planning application migrations. The product code used in the migration definition files for Planning is HP and the sample application is SampApp. All sample migration definition files are provided in EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample.

Exporting to the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="Application" product="HP" project="Default Application Group"
      application="HPAuto1" />
    <Target type="FileSystem" filePath="/HP-HPAuto1" />
    <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
    <Artifact recursive="true" parentPath="/Global Artifacts" pattern="*" />
    <Artifact recursive="true" parentPath="/Plan Type" pattern="*" />
    <Artifact recursive="true" parentPath="/Relational Data" pattern="*" />
    <Artifact recursive="true" parentPath="/Security" pattern="*" />
  </Task>
</Package>
```
**Importing from the File System**

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="FileSystem" filePath="/HP-HPAuto1" />
    <Target type="Application" product="HP" project="Default Application Group" application="HPAuto1" />
    <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
    <Artifact recursive="true" parentPath="/Global Artifacts" pattern="*" />
    <Artifact recursive="true" parentPath="/Plan Type" pattern="*" />
    <Artifact recursive="true" parentPath="/Relational Data" pattern="*" />
    <Artifact recursive="true" parentPath="/Security" pattern="*" />
  </Task>
</Package>
```

**Lifecycle Management Log Files**

Lifecycle Management log files for Planning are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.*
About Profitability and Cost Management Artifacts

Profitability and Cost Management has two types of artifacts: metadata or dimensional and model artifacts.

The metadata or dimensional artifacts are Performance Management Architect enabled. The Profitability and Cost Management Performance Management Architect enabled artifacts are listed under the EPMA node in the Foundation application group and are described in Appendix G, "Performance Management Architect and Lifecycle Management."

The model artifacts are listed in a folder that is defined by the user during Profitability and Cost Management deployment from Performance Management Architect.

There are two types of Profitability and Cost Management applications: Standard Profitability and Cost Management and Detailed Profitability and Cost Management. You use Lifecycle Management to migrate repository content for the model artifacts in both of these applications.

Standard Profitability and Cost Management Model Artifacts

- AssignmentRules
- Drivers
- Model
  - AssignmentRuleSelections
  - DriverExceptions
  - DriverRules
For a listing of Profitability and Cost Management model artifacts, see “Profitability and Cost Management Artifact Listing” on page 143.

**Profitability and Cost Management Roles Requirement**

Users performing Lifecycle Management operations for Profitability and Cost Management must be assigned the following roles:

- LCM Administrator
- Power User
- Administrator
Profitability and Cost Management Migration Prerequisites

- Install and configure Shared Services and Profitability and Cost Management and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator, Power User, and Administrator roles. See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

- Deploy the application from Performance Management Architect to Profitability and Cost Management (ensure all dimensions are available).

- Profitability and Cost Management Performance Management Architect applications—Before migrating non-dimensional artifacts, Performance Management Architect dimensions must be migrated first. For a listing of Performance Management Architect artifacts, see Appendix G, “Performance Management Architect and Lifecycle Management.”

Profitability and Cost Management Artifact Listing

Subtopics

- About the Artifact Listing
- Standard Profitability and Cost Management Model Artifacts
- Detailed Profitability and Cost Management Model Artifacts

Profitability and Cost Management model artifacts are listed in a folder that is defined by the user during Profitability and Cost Management deployment from Performance Management Architect.

Note: The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- Artifact—Artifact name
- Description—Artifact description
- Last Modified Time—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.

- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product. If NA, the artifact is not editable.

- **Dependencies**—Lists artifact dependencies. For example, Profitability and Cost Management Assignment rules artifacts also require that Profitability and Cost Management Stage definition artifacts be migrated.

---

### Standard Profitability and Cost Management Model Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssignmentRules</td>
<td>A collection of member sets and optional filter sets for a single destination stage. These can be created and reused for multiple assignments that use the same parameters.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Stages</td>
</tr>
<tr>
<td>Drivers</td>
<td>In a Profitability and Cost Management model, these calculate the value of the allocations. They provide the formulas for allocating source intersection values to destination intersections.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>None</td>
</tr>
<tr>
<td>Model</td>
<td>Model elements for a specific Detailed Profitability model based on a selected POV. Includes the following model components:</td>
<td>N/A</td>
<td>No</td>
<td>N/A</td>
<td>POV, Stages</td>
</tr>
<tr>
<td></td>
<td>- AssignmentRuleSelections—Define the flow of data from source to destination, where the destination is defined by mapping the source intersection to one or more of the destination assignment rules.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- DriverExceptions—Applied to drivers after a driver is created. Drivers must be associated with the single intersections to which they apply.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- DriverRules—Applied to drivers after a driver is created. Drivers must be associated with the driver dimension members to which they apply.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- RegularAssignments—Define the flow of data from source to destination, where the destination is defined by mapping the source intersection to a single destination intersection.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>POV</td>
<td>A particular version of a model for a selected snapshot, such as year, period, and status.</td>
<td>Yes</td>
<td>No</td>
<td>NA</td>
<td>None</td>
</tr>
</tbody>
</table>
### Table 42  Detailed Profitability and Cost Management Model Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferences</td>
<td>Settings that apply to the entire model. Preferences might include whether intrastage assignments are allowed or whether you can have multidimensional stages. Essbase connection information for a selected model is specified in the application preferences.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>None</td>
</tr>
<tr>
<td>Stages</td>
<td>In a Profitability and Cost Management model, the processes or activities within the model.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>None</td>
</tr>
</tbody>
</table>

**Detailed Profitability and Cost Management Model Artifacts**

**AssignmentRules**  A collection of member sets and optional filter sets for the destination stage or for identifying sets within the source stage.

**CalculationConfig**  Available calculation operations, including bulk edit expansion and driver operation types.

**Drivers**  Available drivers in a Detailed Profitability model. The drivers calculate the value of the allocation, and provide the formulas for allocating source intersection values to destination intersections.

**Note:** Oracle does not recommend importing or exporting the CalculationConfig artifact. Check with your administrator to determine if this type of artifact is required.

**Processes**

**Preferences**

**Stages, TableRegistration**

**Processes**

**Preferences, CalculationConfig**
<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model</td>
<td>Model elements for a specific Detailed Profitability model based on a selected POV. Includes the following model components:</td>
<td>N/A</td>
<td>No</td>
<td>N/A</td>
<td>Stages, Assignment Rules, Drivers</td>
</tr>
<tr>
<td></td>
<td>- StageObjectCalculations—Represent a simple mathematical calculation that must be performed before or after an assignment on the destination stage defined by stage object calculation drivers and assignment rules.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- AssignmentRuleSelections—Define the flow of data from source to destination, where the destination is defined by mapping the source intersection to one or more of the destination assignment rules.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- DriverExceptions—Applied to drivers after a driver is created. Drivers must be associated with the single intersections to which they apply.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- DriverRules—Applied to drivers after a driver is created. Drivers must be associated with the driver dimension members to which they apply.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>POV</td>
<td>A specific version of a model for a selected snapshot, such as year, period, and status.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>None</td>
</tr>
<tr>
<td>Preferences</td>
<td>Settings that apply to the entire model. <strong>Note:</strong> Oracle recommends that you set the model.data.schema preference to the correct value in the target system before importing an application. If the target system has a value set for this preference, it will not be overwritten on import.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>None</td>
</tr>
<tr>
<td>Processes</td>
<td>The definition of the process defined for each type of calculation. <strong>Note:</strong> Oracle does not recommend importing or exporting the Processes artifact. Check with your administrator to determine if this type of artifact is required.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Tasks</td>
</tr>
<tr>
<td>Scripts</td>
<td>Custom SQL scripts stored in the HPM Product Schema in the HPM_SQL_SCRIPT table that are executed before or after calculation.</td>
<td>N/A</td>
<td>No</td>
<td>N/A</td>
<td>None</td>
</tr>
<tr>
<td>SQLTemplates</td>
<td>The definition of the SQL issued to perform tasks within each type of calculation. <strong>Note:</strong> Oracle does not recommend importing or exporting the SQLTemplates artifact. Check with your Administrator to determine if this type of artifact is required.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>None</td>
</tr>
<tr>
<td>Stages</td>
<td>In a Detailed Profitability model, there is a Source Stage and a Destination Stage.</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Preferences, TableRegistration</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>-----------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>TableRegistration</td>
<td>Registration and mapping of user-defined tables to a Detailed Profitability application. Defines the Source and Destination Tables for the application, and the Table Joins for any associated Lookup tables</td>
<td>N/A</td>
<td>No</td>
<td>N/A</td>
<td>Preferences</td>
</tr>
</tbody>
</table>
| Tasks         | The definition of the tasks performed for each type of calculation.  
**Note:** Oracle does not recommend importing or exporting the Tasks artifact. Check with your Administrator to determine if this type of artifact is required. | Yes                | No                 | N/A                         | SQLTemplates |

**Profitability and Cost Management Migrations and Cross-Product Artifact Dependencies**

When migrating Profitability and Cost Management applications from one environment to another (development to test or test to production), there are cross-product artifact dependencies. Profitability and Cost Management requires artifacts from the following other products to be migrated along with the Profitability and Cost Management-specific artifacts.

- Performance Management Architect Dimensions
- Shared Services Native Directory (users, groups, and provisioning)
- Essbase (for Standard Profitability and Cost Management only)

**Migration Export and Import Options**

**Subtopics**

- Migration Export Options
- Migration Import Options

**Migration Export Options**

Profitability and Cost Management has no product-specific export options.

**Note:** For Standard Profitability and Cost Management, Essbase artifacts are exported (outlines, data, calc scripts) under the Essbase application.
Migration Import Options

When importing, all artifacts are merged if no dependencies are found.

Sample Migration Definition Files

The product code used in the migration definition files for Profitability and Cost Management is HPM. All sample migration definition files are provided in $EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample.$

Exporting to the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />  
  <Task>
    <Source type="Application" product="HPM" project="Default Application Group" application="Bikes72" />
    <Target type="FileSystem" filePath="/HPCM-Bikes72" />
    <Artifact recursive="true" parentPath="/AssignmentRules" pattern="*" />
    <Artifact recursive="true" parentPath="/Drivers" pattern="*" />
    <Artifact recursive="true" parentPath="/Model" pattern="*" />
    <Artifact recursive="true" parentPath="/POV" pattern="*" />
    <Artifact recursive="true" parentPath="/Preferences" pattern="*" />
    <Artifact recursive="true" parentPath="/Stages" pattern="*" />
  </Task>
</Package>
```

Importing from the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />  
  <Task>
    <Source type="FileSystem" filePath="/HPCM-Bikes72" />
    <Target type="Application" product="HPM" project="Default Application Group" application="Bikes72" />
    <Artifact recursive="true" parentPath="/AssignmentRules" pattern="*" />
    <Artifact recursive="true" parentPath="/Drivers" pattern="*" />
    <Artifact recursive="true" parentPath="/Model" pattern="*" />
    <Artifact recursive="true" parentPath="/POV" pattern="*" />
    <Artifact recursive="true" parentPath="/Preferences" pattern="*" />
    <Artifact recursive="true" parentPath="/Stages" pattern="*" />
  </Task>
</Package>
```
Lifecycle Management Log Files

Lifecycle Management log files for Profitability and Cost Management are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.

Note: Details are documented in the logging section of S9 Logging.
About Reporting and Analysis Artifacts

Use Lifecycle Management to migrate repository content for these Reporting and Analysis modules:

- Financial Reporting
- Interactive Reporting
- Production Reporting
- Web Analysis

For a listing of Reporting and Analysis artifacts, see “Reporting and Analysis Artifact Listing” on page 153.

Reporting and Analysis Roles Requirement

Users performing Lifecycle Management operations for Reporting and Analysis must be assigned the following roles:

- LCM Administrator
- Reporting and Analysis Global Administrator
Note: The Reporting and Analysis Global Administrator role is required to import Financial Reporting artifacts exported from release 9.3.x.

See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

Reporting and Analysis Migration Prerequisites

- Install and configure Shared Services and Reporting and Analysis and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator and Reporting and Analysis Global Administrator roles. See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

- Migrate the Shared Services Native Directory artifacts (users, groups, roles, and assigned roles). See “Migrating Native Directory (Security)” on page 47.

- Configure the destination host's Job Service properties for Production Reporting. See “Configuring the Production Reporting Job Service Properties on the Destination Application” on page 152.

- Create Data Access Service data sources for Interactive Reporting jobs. See “Creating Interactive Reporting Data Access Service Data Sources in the Destination Application” on page 153.

Note: Financial Reporting data sources are automatically created when Financial Reporting reports are migrated.

Configuring the Production Reporting Job Service Properties on the Destination Application

Before importing Production Reporting artifacts, you must configure the destination host's Job Service properties for Production Reporting.

To configure the Production Reporting Job Service properties:

1. Log in to EPM Workspace as a Reporting and Analysis Administrator.

2. Select Navigate, then Administer, then Reporting and Analysis, and then Production Reporting Engines.

3. If a PR Engine does not exist, right-click the empty area on the Production Reporting Engines tab, then select Create New PR Engine.

4. Add the SQR product binaries location for the Engine Type, then click OK.
Creating Interactive Reporting Data Access Service Data Sources in the Destination Application

Create Data Access Service (DAS) data sources in the destination application for Interactive Reporting jobs.

To create DAS data sources for Interactive Reporting:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace as a Reporting and Analysis Administrator.
2. Select Navigate, then Administer, then Reporting and Analysis, and then Services.
3. Edit properties for Interactive Reporting Data Access Services.
4. Select the Data Sources tab. Click New to create data sources.
5. Add data source details.

Note: The name of the DAS data source should match the name in the source application. If the names do not match, the DAS service cannot find the appropriate data source because its name is used in the Interactive Reporting connection file (.oce), which remains unchanged during migration.

Reporting and Analysis Artifact Listing

Subtopics

- About the Artifact Listing
- Physical Resources Artifacts
- Security Artifacts
- Schedule Objects Artifacts
- Product Preferences Artifacts
- Repository Objects Artifacts
- Admin Options Artifacts

Reporting and Analysis artifacts are listed in the Reporting and Analysis application group in Shared Services Console.

Note: The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- Artifact—Artifact name
- Description—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.

- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.

- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.

  *Note:* Reporting and Analysis artifacts have editing considerations. See “Editing Individual Reporting and Analysis Artifacts on the File System” on page 160.

- **Dependencies**—Lists artifact dependencies. For example, Recurring Time Events artifacts may also require that Custom Calendars artifacts be migrated.

### Physical Resources Artifacts

The Physical Resources directory contains artifacts that represent objects managed by the system; for example, printers and output directories.

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printers Defined</td>
<td>Printers available to the print server when jobs are running</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Output Directories</td>
<td>Directories for saving export files or Interactive Reporting documents</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

### Security Artifacts

The Security directory contains user preferences artifacts.

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Preferences</td>
<td>Default startup options</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>Any related Repository Objects</td>
</tr>
</tbody>
</table>

### Schedule Objects Artifacts

The Schedule Objects directory contains artifacts that represent scheduled objects; for example, events, calendars, job schedules, and job parameters.
### Table 45  Schedule Objects Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Externally Triggered Events</td>
<td>Triggers for execution of jobs</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Recurring Time Events</td>
<td>Triggers for execution of jobs</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>Custom Calendars, Externally Triggered Events</td>
</tr>
<tr>
<td>Calendars</td>
<td>User-defined time periods and their relationship to each other.</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Job Schedules</td>
<td>Specifies the job that you want to run and the time and job parameter list</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>Events, Job Parameters, Jobs</td>
</tr>
<tr>
<td>Job Parameters</td>
<td>There are two types of job parameters: Personal and Public.</td>
<td>No</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>Jobs, Physical Resources</td>
</tr>
</tbody>
</table>

### Product Preferences Artifacts

The Product Preferences directory contains artifacts that represent product preferences; for example, favorites, personal pages, subscriptions.

### Table 46  Product Preferences Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favorites</td>
<td>A feature that allows the user to add frequently used documents to a special menu</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>
# Repository Objects Artifacts

The Repository Objects directory contains artifacts that represent repository objects such as, folders, third party content, shortcuts, URLs, Web Analysis documents, presentations, database connections, user preferences, shortcuts, and links, Financial Reporting reports, books, batches, texts, grids, images, row and column templates, database connections, and annotations , Interactive Reporting documents, jobs, job outputs, and OCE files, Production Reporting jobs and job outputs, and generic jobs and job outputs.

Table 47  Repository Objects Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Pages</td>
<td>A personal window to repository information. You select what information to display and its layout and colors.</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Subscriptions</td>
<td>A control that provides the ability to subscribe to new content</td>
<td>No</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>Any related Repository Objects</td>
</tr>
</tbody>
</table>

## Table 47  Repository Objects Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td>A file containing other files for the purpose of structuring a hierarchy</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Third Party Content</td>
<td>Content that has been imported from an auxiliary product, such as Microsoft Word or Excel</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Shortcuts</td>
<td>Shortcuts to existing repository objects</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Corresponding existing repository objects</td>
</tr>
<tr>
<td>URLs</td>
<td>Web links published as separate objects</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Financial Reporting Annotations</td>
<td>Collaborative information that can be shared on particular report objects and data.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Financial Reporting objects of the following types:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Data Source</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Grid: Data Source (No Dimension POV)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Text, Chart, Grid, or Image</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Cell or partial POV (for example, rows or columns in a report)</td>
</tr>
<tr>
<td>Financial Reporting Books</td>
<td>A container that holds a group of similar Financial Reporting documents. Books may specify dimension sections or dimension changes.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>Images, any related Financial Reporting Repository Objects</td>
</tr>
<tr>
<td>Financial Reporting Batches</td>
<td>An accumulation of files that have been organized into a single group for transmitting or printing</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>Reports, any related Financial Reporting Repository Objects</td>
</tr>
<tr>
<td>Financial Reporting Database Connections</td>
<td>A file that stores definitions and properties used to connect to data sources and enables database references to be portable and widely used</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Financial Reporting Grids</td>
<td>A report object in which you retrieve data in the rows, columns, and page axes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Financial Reporting Images</td>
<td>A report object that contains a graphic or an image file</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------------</td>
<td>----------------------------------------------------</td>
</tr>
<tr>
<td>Financial Reporting Reports</td>
<td>A Financial Reporting document with predefined behavior or appearance such as text boxes, images, grids and charts</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>Images</td>
</tr>
<tr>
<td>Financial Reporting Row and Column Templates</td>
<td>A template based on rows and columns in a grid</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Financial Reporting Scheduled Batch Jobs</td>
<td>The batch jobs to run and the time and job parameter list for running the job</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Financial Reports, Financial Reporting Batches</td>
</tr>
<tr>
<td>Financial Reporting Texts</td>
<td>Text objects that can be associated with a Financial Reporting report</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Financial Reporting User POV</td>
<td>User specific point of view for data sources</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Financial Reports</td>
</tr>
<tr>
<td>Generic Jobs</td>
<td>Jobs running against Generic Job Factory</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Generic Jobs, required files, custom forms</td>
</tr>
<tr>
<td>Generic Job Outputs</td>
<td>Outputs from Generic jobs</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Generic Jobs</td>
</tr>
<tr>
<td>Interactive Reporting Documents</td>
<td>Files you create and use to retrieve information from a database, analyze the information, and build reports</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>OCE files</td>
</tr>
<tr>
<td>Interactive Reporting Jobs</td>
<td>Similar to documents except jobs can be scheduled while documents work only &quot;on-demand&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>OCE files, Custom Calendars</td>
</tr>
<tr>
<td>Interactive Reporting Job Outputs</td>
<td>Outputs from Interactive Reporting jobs</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Interactive Reporting Jobs</td>
</tr>
<tr>
<td>Artifact</td>
<td>Description</td>
<td>Last Modified Time</td>
<td>Last Modified User</td>
<td>Editable on the File System?</td>
<td>Dependencies</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OCE files</td>
<td>Interactive Reporting Database Connections</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Other OCE files containing connection metadata</td>
</tr>
<tr>
<td>Production Reporting Jobs</td>
<td>Documents with special properties that can be launched to generate output</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML</td>
<td>DataSources, required files (data files, images, and so on)</td>
</tr>
<tr>
<td>Production Reporting Job Outputs</td>
<td>Outputs from Production Reporting jobs</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Production Reporting Jobs</td>
</tr>
<tr>
<td>Web Analysis Database Connections</td>
<td>Metadata objects for connecting to Web Analysis datasources</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Web Analysis Documents</td>
<td>Documents that display data values returned from the data source in a data object. Multiple data objects of multiple display types can occupy one document.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes—XML (metadata only)</td>
<td></td>
</tr>
<tr>
<td>Web Analysis Links</td>
<td>Web Analysis objects linked with other Web Analysis objects</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Corresponding Web Analysis Objects</td>
</tr>
<tr>
<td>Web Analysis Presentations</td>
<td>Collections of Web Analysis Reports</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Corresponding Web Analysis Reports</td>
</tr>
<tr>
<td>Web Analysis User Preferences</td>
<td>Objects describing Web Analysis-specific user preferences</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>None</td>
</tr>
<tr>
<td>Web Analysis Shortcuts</td>
<td>Web Analysis objects pointing to other Web Analysis objects</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes - XML (metadata only)</td>
<td>Corresponding Web Analysis Objects</td>
</tr>
</tbody>
</table>

1 For most of the Repository Objects artifacts, only artifact metadata can be edited on the file system (XML file containing respective object metadata). For details, see “Editing Individual Reporting and Analysis Artifacts on the File System” on page 160.

2 Third-party objects must be edited with the appropriate editors. For example, .doc file content can be edited with Microsoft Word (rename the file, edit it, and then rename it back).

3 Migrating Financial Reporting database connections is not supported in the current release.
4Though Interactive Reporting documents binary can be edited with Interactive Reporting Client (you would need to rename the file to .bqy, edit it, and rename it back), this is not recommended because the file may become inconsistent with its metadata. It is strongly recommended that you edit Interactive Reporting documents within the product only.

Admin Options Artifacts

The Admin Options directory contains artifacts that represent administrative options; for example, Production Reporting datasources and generic job configuration.

**Note:** Computer-specific artifacts cannot be migrated. They must be manually defined on the destination environment before a migration can occur.

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production Reporting DataSources</td>
<td>A definition of a datasource to be used by a Production Reporting Job in Reporting and Analysis. It is defined as database connection type (for example, ODBC), database connection name (for example, ODBC datasource name), and optional environment variables.</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
<tr>
<td>Generic job configuration¹</td>
<td>A definition of a generic application to be used to run generic Reporting and Analysis jobs; for example, any third party application</td>
<td>No</td>
<td>No</td>
<td>Yes—XML</td>
<td>None</td>
</tr>
</tbody>
</table>

¹A common definition can be migrated but an executable cannot. Executables must be manually defined after migration of generic jobs for each of the generic job configurations.

Editing Individual Reporting and Analysis Artifacts on the File System

When exporting Reporting and Analysis artifacts for editing on the file system, the artifacts are exported as follows:

- General objects (such as docs and PDF files), BQY files and jobs, OCE files, SQR and Generic jobs
These files are exported for edit as a set of files in a zip archive. The zip archive includes an XML file containing the object’s metadata and one or more binary files from the FS repository.

To edit these files:

1. Export the artifacts. See “Exporting Individual Artifacts for Editing” on page 46.
2. Unzip the content.
3. Note the binary file names and rename them to enable the operating system to open the files with the appropriate application (for example, add the .BQY extension).
4. Edit the artifacts.
5. Rename the binary files back to the original names noted in step 3.
6. Add the edited file to the archive using the replace option.
7. Import the archive back into the application. See “Importing Individual Artifacts After Editing” on page 47.

- Financial Reporting objects
  
Financial Reporting objects are exported the same way as the objects listed previously. After exporting Financial Reporting objects for editing, the resulting zip archive includes an XML file with metadata and a set of files internally representing Financial Reporting objects in Reporting and Analysis. You can only edit the object’s metadata since binary representation is not plain/user-friendly.

- Web Analysis objects
  
These objects are represented as a zipped XML file that contains both the metadata and the actual content of the Web Analysis artifacts. They can be edited, but there is no tool to work with such objects on the file system, and there is no guarantee that the integrity is preserved after the files are edited and imported back into application.

### Reporting and Analysis Artifact Types

Lifecycle Management Utility supports the migration of Reporting and Analysis artifacts based on the artifact type. The following table lists the valid artifact types for Reporting and Analysis artifacts.

**Note:** The artifact type parameter is not supported in the Shared Services Console nor is it supported for any other EPM System product. Artifact types are only functional for Lifecycle Management Utility.

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Artifact Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production Reporting SubService</td>
<td>PRSubService</td>
</tr>
<tr>
<td>Artifact</td>
<td>Artifact Type</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Generic product configuration</td>
<td>GenericProduct</td>
</tr>
<tr>
<td>Printer definition</td>
<td>Printer</td>
</tr>
<tr>
<td>Output directory definition</td>
<td>OutputDirectory</td>
</tr>
<tr>
<td>Subscription</td>
<td>Subscription</td>
</tr>
<tr>
<td>List of favorites for user</td>
<td>Favorites</td>
</tr>
<tr>
<td>Personal Page</td>
<td>PersonalPageContent</td>
</tr>
<tr>
<td>Custom calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Externally Triggered Event</td>
<td>ExternallyTriggeredEvent</td>
</tr>
<tr>
<td>Recurring Time Event</td>
<td>RecurringTimeEvent</td>
</tr>
<tr>
<td>Job Parameter</td>
<td>JobParameter</td>
</tr>
<tr>
<td>Job Schedule</td>
<td>JobSchedule</td>
</tr>
<tr>
<td>User Preferences</td>
<td>UserPreferences</td>
</tr>
<tr>
<td>Folder</td>
<td>Folder</td>
</tr>
<tr>
<td>OCE File</td>
<td>OCEFile</td>
</tr>
<tr>
<td>Interactive Reporting documents and jobs</td>
<td>application/x-brioquery</td>
</tr>
<tr>
<td>Oracle Hyperion Interactive Reporting job outputs</td>
<td>BrioQueryOutputCollection</td>
</tr>
<tr>
<td>Production Reporting jobs</td>
<td>application/x-SQR</td>
</tr>
<tr>
<td>Oracle Hyperion SQR Production Reporting job outputs</td>
<td>SQRProgramOutput</td>
</tr>
<tr>
<td>Generic jobs</td>
<td>ProgramCollection</td>
</tr>
<tr>
<td>Generic job outputs</td>
<td>OutputCollection</td>
</tr>
<tr>
<td>Shortcut</td>
<td>Shortcut</td>
</tr>
<tr>
<td>URL</td>
<td>URL</td>
</tr>
<tr>
<td>Third party content</td>
<td>application/pdf, image/gif, image/jpeg (and so on)</td>
</tr>
<tr>
<td>Financial Reporting Report</td>
<td>application/hyperion-reports-report</td>
</tr>
<tr>
<td>Financial Reporting Snapshot Report</td>
<td>application/hyperion-reports-snapshot_report</td>
</tr>
<tr>
<td>Financial Reporting Book</td>
<td>application/hyperion-reports-book</td>
</tr>
<tr>
<td>Financial Reporting Snapshot Book</td>
<td>application/hyperion-reports-snapshot_book</td>
</tr>
<tr>
<td>Financial Reporting Batch</td>
<td>application/hyperion-reports-batch</td>
</tr>
</tbody>
</table>
Reporting and Analysis Application Migrations and Cross-Product Artifact Dependencies

When migrating Reporting and Analysis applications from one environment to another (development to test or test to production), there are cross-product artifact dependencies. Reporting and Analysis requires that Shared Services Native Directory (users, groups, and provisioning) artifacts be migrated along with the Reporting and Analysis-specific artifacts.
Migration Export and Import Options

Subtopics

- Migration Export Options
- Migration Import Options

To access export and import options, launch Shared Services Console and select Administration, and then Migration Options.

Note: In previous releases, Shared Services Console provided an “Include Dependent Artifacts” option for Reporting and Analysis. This option is no longer available. Instead, you must manually select any necessary dependencies (for example, dependent objects which were not imported during previous migrations).

Migration Export Options

Reporting and Analysis export option:

- Export With Job Output—If Yes, then jobs will be exported along with their outputs even in cases where the outputs do not match export filters. The default value is Yes.

Migration Import Options

Reporting and Analysis import options:

- Exclude Job Output on Import—If Yes, all job outputs will be skipped on import, even if they match the import filter. The default value is No.
- Replace Newer Artifacts Only—If Yes, only the artifacts that have a newer last modified timestamp in the file system compared to the one in the repository will be imported and replaced. The default value is No, which replaces any existing artifacts in the destination environment regardless of the last modified timestamp.

Sample Migration Definition Files

The product code used in the migration definition files for Reporting and Analysis is HAVA. Sample migration definition files for Reporting and Analysis are located in EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample.

Exporting to the File System

```xml
<package>
  <locale>en_US</locale>
  <user name="" password="" />
  <task>
```
Importing from the File System

<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="FileSystem" filePath="/RnA-Reporting and Analysis" />
    <Target type="Application" product="HAVA" project="Reporting and Analysis" application="Reporting and Analysis" />
    <Artifact recursive="true" parentPath="/Admin Options" pattern="*" />
    <Artifact recursive="true" parentPath="/Physical Resources" pattern="*" />
    <Artifact recursive="true" parentPath="/Product Preferences" pattern="*" />
    <Artifact recursive="true" parentPath="/Repository Objects" pattern="*" />
    <Artifact recursive="true" parentPath="/Schedule Objects" pattern="*" />
    <Artifact recursive="true" parentPath="/Security" pattern="*" />
  </Task>
</Package>

Lifecycle Management Log Files

Lifecycle Management log files for Reporting and Analysis are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.

Note: The Lifecycle Management log file is located in MIDDLEWARE_HOME/user_projects/epmsystem1/diagnostics/logs/migration. The product log file (Reporting and Analysis Export Import engine) is located in MIDDLEWARE_HOME/user_projects/epmsystem1/diagnostics/logs/ReportingAnalysis/erengine.log.
About Shared Services Artifacts

Use Lifecycle Management to migrate these types of Shared Services artifacts:

- **Native Directory (Security)**—Shared Services Native Directory artifacts enable you to migrate users, groups, delegated lists, custom aggregate roles, and assigned roles. Product-specific security artifacts (for example, Oracle Hyperion Planning access permissions and Oracle Essbase filters) are listed separately under the product application groups in Shared Services Console. For a listing of application security artifacts by product, see the appendixes in this guide.

- **Taskflows**—Shared Services Taskflow artifacts enable you to migrate taskflow definitions from one environment to another or to edit taskflow definitions on the file system. EPM System products that use taskflows are Financial Management, Performance Management Architect, and Profitability and Cost Management.

For a listing of Shared Services artifacts, see “Shared Services Artifact Listing” on page 168.

Shared Services Roles Requirement

Users performing Lifecycle Management operations for Shared Services must be assigned the LCM Administrator role.

See the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.
Shared Services Migration Prerequisites

- Install and configure Shared Services and EPM System products and verify that they are running. See the Oracle Enterprise Performance Management System Installation and Configuration Guide.

- Ensure that users performing Lifecycle Management operations are assigned the LCM Administrator role. See the Oracle Enterprise Performance Management System User and Role Security Guide.

- When migrating Shared Services Native Directory artifacts, ensure that the source and destination applications have matching names. If the source and destination names are different, perform these actions:
  1. Migrate the source application artifacts to the file system.
  2. In the source application CSV file (for example, sourceapp.csv), replace the source application group name with the destination application group name. Then replace the source application name with the destination application name.
  3. Rename the file to use the destination application name (for example, destinationapp.csv).
  4. Migrate the updated CSV file from the file system to the destination application.

- When migrating Shared Services native users across environments, if there are users in the source environment that should not be migrated to the target environment, you must edit the exported content to remove these users before importing. In the File System, open the artifact Users.csv and remove the rows that should not be migrated. (Each row corresponds to one user.) Once edited, you can import the Users.csv artifact into the target environment, and the excluded users will not get created.

Shared Services Artifact Listing

Subtopics

- About the Artifact Listing
- Native Directory (Security) Artifacts
- Taskflow Artifacts

Shared Services artifacts are listed in the Foundation application group in Shared Services Console. Only an LCM Administrator can view Shared Services artifacts in the Foundation application group.

Note: The artifacts displayed in Oracle Hyperion Shared Services Console vary by implementation.
- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, Native Directory Groups artifacts also require that Native Directory Users artifacts be migrated.

### Native Directory (Security) Artifacts

**Note:** Native Directory is the default LDAP-based user directory that Shared Services uses.

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users</td>
<td>A user directory entry that identifies a user</td>
<td>Yes</td>
<td>No</td>
<td>Yes—CSV</td>
<td>None</td>
</tr>
<tr>
<td>Groups</td>
<td>A container for assigning similar access permissions to multiple users</td>
<td>Yes</td>
<td>No</td>
<td>Yes—CSV</td>
<td>Users</td>
</tr>
<tr>
<td>Roles</td>
<td>Privileges that provide access to system artifacts and functions</td>
<td>Yes</td>
<td>No</td>
<td>Yes—CSV</td>
<td>Users, Groups</td>
</tr>
<tr>
<td>Delegated Lists</td>
<td>A list that identifies the users and groups that a Delegated Administrator can manage</td>
<td>Yes</td>
<td>No</td>
<td>Yes—CSV</td>
<td>Users, Groups</td>
</tr>
<tr>
<td>Assigned Roles (by product and application)</td>
<td>Roles granted to users and groups through the provisioning process</td>
<td>Yes</td>
<td>No</td>
<td>Yes—CSV</td>
<td>Users, Groups</td>
</tr>
</tbody>
</table>
## Taskflow Artifacts

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Description</th>
<th>Last Modified Time</th>
<th>Last Modified User</th>
<th>Editable on the File System?</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Definition</td>
<td>Complete taskflow information such as Stage, Link, and Application details</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Native Directory Users, Native Directory Groups</td>
</tr>
<tr>
<td>Taskflow ACL</td>
<td>ACL information in the taskflow</td>
<td>Yes</td>
<td>No</td>
<td>Yes—Properties</td>
<td>Native Directory Users, Native Directory Groups</td>
</tr>
<tr>
<td>Taskflow Scheduler</td>
<td>Scheduler information in the taskflow</td>
<td>Yes</td>
<td>No</td>
<td>Yes—XML</td>
<td>Native Directory Users, Native Directory Groups</td>
</tr>
</tbody>
</table>

### Shared Services Application Migrations and Cross-Product Artifact Dependencies

Shared Services has no cross-product artifact dependencies.

### Shared Services Native Directory Migration Options

#### Subtopics
- Native Directory Migration Import Options
- Native Directory CSV Files

#### Native Directory Migration Import Options

The following list describes Shared Services Native Directory import options:

- **Import Operation**—Select an option:
  - **Create**—Creates users, groups and roles if they do not exist in the target. If they exist in the target, the create operation fails. Augments group, role, and provisioning relationships.
  - **Update**—Updates users, groups, and roles. Replaces group, role, and provisioning relationships.
  - **Create/Update**—Attempts a create operation on each entity in the file. If the operation fails, an update operation is attempted.
  - **Delete**—Deletes the users, groups, and roles that are being imported. Deletes group, role, and provisioning relationships.
Note: To delete a deactivated Native Directory user, the user must be activated first before it can be deleted.

- Max errors before stopping import—Specify the number of errors allowed before the import process is stopped.

Native Directory CSV Files

The Native Directory import source files are CSV files. The CSV file format is a tabular data format that contains fields separated by commas and enclosed in double quotation marks. Lifecycle Management supports only Excel-compliant CSV files. The CSV files that Excel outputs differ from the standard CSV files:

- Leading and trailing white space is significant.
- Back slashes are not special characters and do not escape anything.
- Quotes inside quoted strings are escaped with double quotes rather than back slashes.

Excel converts data before putting it in CSV format.

Conversions that Excel performs on CSV files:

- Tabs are converted to single spaces.
- New lines are always represented as the UNIX new line ("\n").
- Numbers of greater than 12 digits are represented in truncated scientific notation form.

A separate CSV file is available for the following entities:

- Users
- Groups
- Roles
- Provisioning info
- Delegated lists

Each section within a CSV file is identified by two mandatory lines: entity and header. The entity line is identified by a predefined entity name preceded by the # character. The header line follows the entity line. The header line is a comma-separated list of predefined attributes for the entity.

The order of attributes in the header line is insignificant. However, the data lines, which follow the header line, must present data in the order in which the header line presents attributes. If data is not to be specified, use a comma to indicate that a value is not to be set. The entity line, header line, and data lines provide the information required for processing.

Boundaries applied to create, update, and delete operations on CSV files:

- Users, groups, and roles are processed one data line at a time.
- Group members are processed with multiple data lines under one header and one parent group.
Role members are processed with multiple data lines under one header and one parent role.

User provisioning is processed with multiple data lines under one header and one group or user.

Error handling is based on the process boundaries. One error is counted for each failure in a process boundary.

See the sections below for sample CSV files and attribute information:

- “CSV File for Users” on page 172
- “CSV File for Groups” on page 173
- “CSV File for Roles” on page 174
- “CSV File for Provisioning” on page 174
- “CSV File for Delegated Lists” on page 175

CSV File for Users

Sample CSV File for User

```
#user
id,provider,login_name,first_name,last_name,description,email,internal_id,password,active
admin,Native Directory,admin,administrator,user,hss admin
user,admin@hyperion.com,"native://DN=cn=911,ou=People,dc=css,dc=hyperion,dc=com?USER",
(SHA)W6ph5Mm5Pz8GgiULbPgzG37mj9g=,true
```

In this sample, the user CSV file is used to create the user admin in a Native Directory with the login name admin, first name administrator, last name user, description hss admin user, e-mail id admin@hyperion.com, internal id "native://DN=cn=911,ou=People,dc=css,dc=hyperion,dc=com?USER", encrypted password (SHA)W6ph5Mm5Pz8GgiULbPgzG37mj9g=, and active true:

**Note:** Plain-text passwords specified in the CSV file are encrypted.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description and Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>User's ID</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> admin</td>
</tr>
<tr>
<td>provider</td>
<td><strong>Optional:</strong> Name of the source user directory</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> Native Directory</td>
</tr>
<tr>
<td>login_name</td>
<td>User's login name</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> admin</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description and Example</td>
</tr>
<tr>
<td>----------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>first_name</td>
<td>Optional: User's first name</td>
</tr>
<tr>
<td></td>
<td>Example: administrator</td>
</tr>
<tr>
<td>last_name</td>
<td>Optional: User's last name</td>
</tr>
<tr>
<td></td>
<td>Example: user</td>
</tr>
<tr>
<td>description</td>
<td>Optional: User description</td>
</tr>
<tr>
<td></td>
<td>Example: hss admin user</td>
</tr>
<tr>
<td>email</td>
<td>Optional: User's e-mail address</td>
</tr>
<tr>
<td></td>
<td>Example: <a href="mailto:admin@hyperion.com">admin@hyperion.com</a></td>
</tr>
<tr>
<td>internal_id</td>
<td>The autogenerated internal identity of the Native Directory user</td>
</tr>
<tr>
<td></td>
<td>Example: &quot;native://DN=cn=911,ou=People,dc=css,dc=hyperion,dc=com?USER&quot;</td>
</tr>
<tr>
<td>password</td>
<td>User's password</td>
</tr>
<tr>
<td></td>
<td>Example: {SHA}W6ph5Mm5Pz8GlULbPgzG37mj9g=</td>
</tr>
<tr>
<td>active</td>
<td>Indicates whether user is active (true) or not active (false)</td>
</tr>
<tr>
<td></td>
<td>Example: true</td>
</tr>
</tbody>
</table>

### CSV File for Groups

**Sample CSV File for Group**

```csv
#group
id,provider,name,description, internal_id
WORLD,Native Directory,WORLD,Contains all users,611
```

In this sample, the group CSV file is used to create the `WORLD` group in a Native Directory with the group ID `WORLD`, description `Contains all users`, and internal ID `611`:

### Table 53  Group Entity Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description and Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>Group identifier</td>
</tr>
<tr>
<td></td>
<td>Example: WORLD</td>
</tr>
<tr>
<td>provider</td>
<td>Optional: Source user directory for the group</td>
</tr>
<tr>
<td></td>
<td>Example: Native Directory</td>
</tr>
<tr>
<td>name</td>
<td>Group name</td>
</tr>
<tr>
<td></td>
<td>Example: WORLD</td>
</tr>
<tr>
<td>description</td>
<td>Optional: Group description</td>
</tr>
<tr>
<td></td>
<td>Example: Contains all users</td>
</tr>
</tbody>
</table>
CSV File for Roles

Sample CSV File for Role

```
#role
id,product_type,name,description
Designer_rep,hava-11.1.1,Designer_rep,Report Designer
```

In this sample, the role CSV file is used to create an aggregated role in Native Directory with role id `Designer_rep` for product `hava-11.1.1` (Oracle Hyperion Reporting and Analysis, version 11.1.1), role name `Designer_rep`, and description `Report Designer`. Product type indicates the product to which the aggregated role belongs.

Table 54  Role Entity Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description and Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>Role identifier</td>
</tr>
<tr>
<td></td>
<td>Example: Designer_rep</td>
</tr>
<tr>
<td>product_type</td>
<td>Product type (specified as product code-product version) to which the role belongs</td>
</tr>
<tr>
<td></td>
<td>Example: hava-11.1.1</td>
</tr>
<tr>
<td>name</td>
<td>Role name</td>
</tr>
<tr>
<td></td>
<td>Example: Designer_rep</td>
</tr>
<tr>
<td>description</td>
<td>Optional: Role description</td>
</tr>
<tr>
<td></td>
<td>Example: Report Designer</td>
</tr>
</tbody>
</table>

CSV File for Provisioning

Sample CSV File for Provisioning

```
#provisioning
app_id,product_type,role_id,user_id,group_id
WebAnalysis,hava-11.1.1,Provisioning Manager,pturner,testgroup
```

In this sample, the provisioning CSV file is used to create a role assignment for application name `WebAnalysis`. The role ID is `Provisioning Manager`, which belongs to product type `hava-11.1.1`. User `pturner` and group `testgroup` are provisioned with this role.
### Table 55  Provisioning Entity Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description and Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>app_id</td>
<td>The application to which the role belongs&lt;br&gt;Example: WebAnalysis</td>
</tr>
<tr>
<td>product_type</td>
<td>Product type (specified as product code-product version) to which the role belongs&lt;br&gt;Example: hava-11.1.1</td>
</tr>
<tr>
<td>role_id</td>
<td>Unique role identifier&lt;br&gt;Example: native://DN=cn=HUB:2,ou=HUB,ou=Roles,dc=css,dc=hyperion,dc=com?ROLE</td>
</tr>
<tr>
<td>user_id</td>
<td>Unique identifier of a user who is provisioned to the role&lt;br&gt;Example: ptturner</td>
</tr>
<tr>
<td>group_id</td>
<td>Unique identifier of a group that is provisioned to the role&lt;br&gt;Example: testgroup</td>
</tr>
</tbody>
</table>

### CSV File for Delegated Lists

#### Sample CSV File for Delegated List

```csv
#delegated list
id,name,description,manager_id,manager_provider,user_id,user_provider,group_id,group_provider
testlist,testlist,my_list,admin,Native Directory,,testGroup,NativeDirectory
```

In this sample, the delegated list CSV file can be used to create a delegated list with list id and name testlist, and description my_list. User admin defined in Native Directory is the delegated administrator of this list which allows admin to manage group testGroup defined on Native Directory.

### Table 56  Delegated List Entity Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description and Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>The list identifier, typically the same as the list name&lt;br&gt;Example: testlist</td>
</tr>
<tr>
<td>name</td>
<td>Delegated list name&lt;br&gt;Example: testlist</td>
</tr>
<tr>
<td>description</td>
<td>Delegated list description&lt;br&gt;Example: my_list</td>
</tr>
<tr>
<td>manager_id</td>
<td>Unique identifier of a user or group who manages the list. Each manager must be identified in a separate definition.&lt;br&gt;Example: admin</td>
</tr>
</tbody>
</table>
### Shared Services Taskflows Migration Export and Import Options

Shared Services has no taskflow-specific export or import options. However, all imports will automatically overwrite destination artifacts.

The Oracle Enterprise Performance Management System products that use taskflows are Financial Management, Performance Management Architect, and Profitability and Cost Management. Taskflows have associated applications and users that are exported with a taskflow.

For more information about taskflows, see the product documentation for Oracle Hyperion Financial Management, Oracle Hyperion EPM Architect, and Oracle Hyperion Profitability and Cost Management.

### Sample Migration Definition Files

The product code used in the migration definition files for Shared Services is **HUB**. All sample migration definition files for Shared Services are provided in `EPM_ORACLE_HOME/common/utilities/LCM/11.1.2.0/Sample`.

#### Exporting to the File System

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
  <LOCALE>en_US</LOCALE>
  <User name="" password="" />
  <Task>
    <Source type="Application" product="HUB" project="Foundation" application="Shared Services" />
    <Target type="FileSystem" filePath="/HSS-Shared Services" />
  </Task>
</Package>
```
Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Shared Services are listed in the Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide.
access permissions A set of operations that a user can perform on a resource.

aggregated role A custom role that aggregates multiple predefined roles within a Hyperion product.

application 1) A software program designed to run a specific task or group of tasks such as a spreadsheet program or database management system. 2) A related set of dimensions and dimension members that are used to meet a specific set of analytical requirements, reporting requirements, or both.

Application Migration Utility A command-line utility for migrating applications and artifacts.

artifact An individual application or repository item; for example, scripts, forms, rules files, Interactive Reporting documents, and financial reports. Also known as an object.

authentication Verification of identity as a security measure. Authentication is typically based on a user name and password. Passwords and digital signatures are forms of authentication.

automated stage A stage that does not require human intervention; for example, a data load.

backup A duplicate copy of an application instance.

business process A set of activities that collectively accomplish a business objective.

context variable A variable that is defined for a particular task flow to identify the context of the taskflow instance.

external authentication Logging on to Oracle EPM System products with user information stored outside the application. The user account is maintained by the EPM System, but password administration and user authentication are performed by an external service, using a corporate directory such as Oracle Internet Directory (OID) or Microsoft Active Directory (MSAD).

filter A constraint on data sets that restricts values to specific criteria; for example, to exclude certain tables, metadata, or values, or to control access.

group A container for assigning similar access permissions to multiple users.

identity A unique identification for a user or group in external authentication.

integration A process that is run to move data between Oracle’s Hyperion applications using Shared Services. Data integration definitions specify the data moving between a source application and a destination application, and they enable the data movements to be grouped, ordered, and scheduled.

lifecycle management The process of migrating an application, a repository, or individual artifacts across product environments.

link (1) A reference to a repository object. Links can reference folders, files, shortcuts, and other links. (2) In a taskflow, the point where the activity in one stage ends and another begins.

link condition A logical expression evaluated by the taskflow engine to determine the sequence of launching taskflow stages.

load balancing Distribution of requests across a group of servers, which helps to ensure optimal end user performance.

managed server An application server process running in its own Java Virtual Machine (JVM).

manual stage A stage that requires human intervention.

migration The process of copying applications, artifacts, or users from one environment or computer to another; for example, from a testing environment to a production environment.
migration audit report  A report generated from the migration log that provides tracking information for an application migration.

migration definition file (.mdf)  A file that contains migration parameters for an application migration, enabling batch script processing.

migration log  A log file that captures all application migration actions and messages.

migration snapshot  A snapshot of an application migration that is captured in the migration log.

model  1) In data mining, a collection of an algorithm’s findings about examined data. A model can be applied against a wider data set to generate useful information about that data. 2) A file or content string containing an application-specific representation of data. Models are the basic data managed by Shared Services, of two major types: dimensional and nondimensional application objects. 3) In Business Modeling, a network of boxes connected to represent and calculate the operational and financial flow through the area being examined.

product  In Shared Services, an application type, such as Planning or Performance Scorecard.

project  An instance of Oracle’s Hyperion products grouped together in an implementation. For example, a Planning project may consist of a Planning application, an Essbase cube, and a Financial Reporting Server instance.

provisioning  The process of granting users and groups specific access permissions to resources.

repository  Storage location for metadata, formatting, and annotation information for views and queries.

role  The means by which access permissions are granted to users and groups for resources.

security agent  A Web access management provider (for example, Oracle Access Manager, Oracle Single Sign-On, or CA SiteMinder) that protects corporate Web resources.

security platform  A framework enabling Oracle EPM System products to use external authentication and single sign-on.

Shared Services Registry  The part of the Shared Services repository that manages EPM System deployment information for most EPM System products, including installation directories, database settings, computer names, ports, servers, URLs, and dependent service data.

single sign-on (SSO)  The ability to log on once and then access multiple applications without being prompted again for authentication.

stage  1) A task description that forms one logical step within a taskflow, usually performed by an individual. A stage can be manual or automated. 2) For Profitability, logical divisions within the model that represent the steps in the allocation process within your organization.

stage action  For automated stages, the invoked action that executes the stage.

sync  Synchronization of Shared Services and application models.

synchronized  The condition that exists when the latest version of a model resides in both the application and in Shared Services. See also model.

task list  A detailed status list of tasks for a particular user.

taskflow  The automation of a business process in which tasks are passed from one taskflow participant to another according to procedural rules.

taskflow definition  Business processes in the taskflow management system that consist of a network of stages and their relationships; criteria indicating the start and end of the taskflow; and information about individual stages, such as participants, associated applications, associated activities, and so on.

taskflow instance  A single instance of a taskflow including its state and associated data.

taskflow management system  A system that defines, creates, and manages the execution of a taskflow, including definitions, user or application interactions, and application executables.

taskflow participant  The resource that performs the task associated with the taskflow stage instance for both manual and automated stages.

token  An encrypted identification of one valid user or group on an external authentication system.
transformation 1) A process that transforms artifacts so that they function properly in the destination environment after application migration. 2) In data mining, the modification of data (bidirectionally) flowing between the cells in the cube and the algorithm.

upgrade The process of replacing a software release with a newer release. The term upgrade does not apply to installing a maintenance release. See also maintenance release, migration.

user directory A centralized location for user and group information, also known as a repository or provider. Popular user directories include Oracle Internet Directory (OID), Microsoft Active Directory (MSAD), and Sun Java System Directory Server.
Index

A
admin options artifacts, 160
administrative options artifacts, 125
Application Administrator role, 102
Application Creator role, 130
application groups
  adding applications to new, 36
  creating, 36
  defined, 35
  deleting, 37
  renaming, 36
application metadata artifacts, 115
application migrations
  for Calculation Manager, 76
  for ERP Integrator, 83
  for Essbase, 92
  for Performance Management Architect, 120
  for Performance Scorecard, 125
  for Planning, 138
  for Profitability and Cost Management, 147
  for Reporting and Analysis, 163
  for Shared Services, 170
applications
  adding to existing application group, 36
  adding to new application groups, 36
  auditing, 54
  defined, 35
  defining destination options, 43
  defining source options, 43
  defining the destination, 43
  delete, 38
  deleting, 39
  displaying selected only, 42
  migrating, 43
  moving, 38
  removing from application groups, 36
  searching for artifacts, 42
  viewing all, 42

Artifact List option, 42
artifact listing
  for Calculation Manager, 74
  for deployment metadata, 70
  for ERP Integrator, 80
  for Essbase, 88
  for Financial Close Management, 96
  for Financial Management, 103
  for Performance Management Architect, 114
  for Performance Scorecard, 124
  for Planning, 131
  for Profitability and Cost Management, 141, 143
  for Reporting and Analysis, 153
  for Shared Services, 168
artifact report, 54
artifact types, for Reporting and Analysis, 161
artifacts
  about Calculation Manager, 73
  about deployment metadata, 69
  about Essbase, 87
  about Performance Scorecard, 123
  about Profitability and Cost Management, 141
  about Shared Services, 167
  defined, 13
  defining destination options, 43
  defining source options, 43
  defining the destination, 43
  displaying selected only, 42
  editing individual, 47
  editing individual Reporting and Analysis on the file system, 160
  exporting individual for editing, 46
  exporting individual Reporting and Analysis artifacts for editing, 160
  for ERP Integrator, 81, 82
  for Financial Close Management, 97
  for Profitability and Cost Management, 144, 145
  importing individual after editing, 47
importing individual Reporting and Analysis after editing, 160
migrating, 43
searching for, 42
searching for in Shared Services Console, 42
viewing, 41
viewing all, 42
assigned roles, migrating, 47
audit report, 54
auditing applications, 54

B
backup and recovery, 20, 21
base path, specifying using Lifecycle Management Utility, 65
Browse tab, 33
browser problems
  pop-up blockers, 31
browsing artifacts, 41

C
Calc role, 88
Calculation Manager
  about, 73
  application migrations, 76
  artifact listing, 74
  cross-product artifact dependencies, 76
  export options, 76
  formulas artifacts, 75
  import options, 76
  LCM log files, 77
  migration options, 76
  migration prerequisites, 74
  product roles, 73
  rule sets artifacts, 75
  rules artifacts, 75
  sample migration definition files, 77
  scripts artifacts, 76
  templates artifacts, 76
classic application migrations
  for Financial Management, 102
command-line utility. See Lifecycle Management Utility
dereguard artifacts, 132
creating
  application groups, 36
CSV files, for Shared Services Native Directory (Security), 171

D
data
  purging migration, 54
data access service data source creation, for Reporting and Analysis, 153
data migration
  for Financial Management, 108
  for Planning, 138
data synchronization artifacts, 118
Database Manager role, 88
default
  password, 31
defining migrations, 43
delegated migrations, 43
deleted lists, migrating, 47
delete
  application, 38
deleting
  application groups, 37
  applications, 39
  applications from application group, 36
deployment metadata
  about, 69
  artifact listing, 70
  export and import prerequisites, 70
  LCM log files, 72
  migration considerations, 71
  migration options, 71
  Registration artifacts, 71
  roles, 70
  Shared Services Registry artifacts, 71
destination options, 43
dimension access artifacts, 118
dimensions artifacts
  for Financial Management, 104
documents artifacts, 106

elements, of a migration definition, 60
EPM System Registry. See Shared Services Registry

ERP Integrator
- about, 79
- application data, 81
- application migrations, 83
- artifact listing, 80
- cross-product artifact dependencies, 83
- export and import options, 84
- global setup artifacts, 82
- migration considerations, 83
- migration prerequisites, 80
- product roles, 80
- sample migration definition files, 84

Essbase
- about, 87
- application artifacts, 89
- application migrations, 92
- artifact listing, 88
- cross-product artifact dependencies, 92
- database artifacts, 90
- Essbase Server artifacts, 89
- export options, 93
- import options, 93
- LCM log files, 94
- migration considerations, 91
- migration options, 93
- migration prerequisites, 88
- product roles, 87
- sample migration definition files, 93

Essbase application artifacts, 89
Essbase database artifacts, 90
Essbase roles
  - Calc, 88
  - Database Manager, 88
  - Server Access, 88
Essbase Server artifacts, 89
exploring artifacts, 41
export options
  - for Calculation Manager, 76
  - for Essbase, 93
  - for Financial Close Management, 99
  - for Financial Management, 109
  - for Performance Management Architect, 120
  - for Performance Scorecard, 126
  - for Planning, 139
  - for Profitability and Cost Management, 147
  - for Reporting and Analysis, 164

for Shared Services Native Directory (Security), 170
exporting
  - individual artifacts for editing, 46
  - individual Reporting and Analysis artifacts for editing, 160
  - native directory, 47
  - security, 47
  - Shared Services Registry data, 50
to the file system, 43

F
file system
  - exporting to, 43
  - importing from, 45
  - migrating to, 43
  - repeating an export to, 45

File System node
  - exporting to, 43
  - importing from, 45
  - re-exporting to, 45

Financial Close Management
- about, 95
- artifact listing, 96
- artifacts, 97
- export options, 99
- import options, 99
- LCM log files, 100
- migration considerations, 98
- migration options, 99
- migration prerequisites, 96
- product roles, 95
- sample migration definition files, 99

Financial Management
- about, 101
- artifact listing, 103
- classic application migrations, 102
- dimensions artifacts, 104
- documents artifacts, 106
- export options, 109
- forms artifacts, 107
- import options, 109
- InterCompany artifacts, 107
- journals artifacts, 108
- LCM log files, 111
- member lists artifacts, 108
- migration considerations, 108
migration options, 109
migration prerequisites, 102
Performance Management Architect application migrations, 102
phased submission artifacts, 105
product roles, 102
rules artifacts, 106
sample migration definition files, 110
security artifacts, 104
Financial Management role, Application Administrator, 102
forms artifacts
  for Financial Management, 107
formulas artifacts, 75

G
global artifacts, 133
groups, migrating, 47

H
high availability, configuring Lifecycle Management for, 20
import options
  for Calculation Manager, 76
  for Essbase, 93
  for Financial Close Management, 99
  for Financial Management, 109
  for Performance Management Architect, 120
  for Performance Scorecard, 126
  for Planning, 139
  for Profitability and Cost Management, 147
  for Reporting and Analysis, 164
importing
  from the file system, 45
  individual artifacts after editing, 47
  individual Reporting and Analysis artifacts after editing, 160
  security, 47
  Shared Services Registry data, 50
installing
  Lifecycle Management, 19
  Lifecycle Management Utility, 58
  InterCompany artifacts, 107

J
job service properties configuration, for Reporting and Analysis, 152
journals artifacts, 108

L
launching
  Shared Services Console, 31
LCM Administrator role, 14, 22, 58
LCM command-line utility. See Lifecycle Management Utility
LCM Designer role, 14, 25
LCM home, 19, 58
LCM log files
  for Calculation Manager, 77
  for deployment metadata, 72
  for Essbase, 94
  for Financial Close Management, 100
  for Financial Management, 111
  for Performance Management Architect, 122
  for Performance Scorecard, 127
  for Planning, 85, 140
  for Profitability and Cost Management, 149
  for Reporting and Analysis, 165
  for Shared Services, 177
Lifecycle Management
  about, 13
  components, 14
  features, 14
  getting started, 17
  installing, 19
  prerequisites, 17
  product codes listing, 16
  products supporting, 15
  quick start, 20
  security, 22
  use cases, 23
Lifecycle Management Utility
  Artifact element, 62
  creating migration definitions, 60
  estimating total artifacts in a migration, 65
  features, 58
  installing, 58
LCM home, 58
listing contents EPM System contents, 66
Locale element, 60
migration prerequisites, 17, 59
Options element, 63
roles, 58
running, 63
running from a non-Foundation Services machine, 59
server components installation location, 58
Source element, 61
specifying the base path, 65
Target element, 62
Task element, 61
User and Password element, 60
using, 57
listing EPM System Contents, 66
log files
for Calculation Manager, 77
for deployment metadata, 72
for Essbase, 94
for Financial Close Management, 100
for Financial Management, 111
for Performance Management Architect, 122
for Performance Scorecard, 127
for Planning, 85, 140
for Profitability and Cost Management, 149
for Reporting and Analysis, 165
for Shared Services, 177

M
member lists artifacts, 108
migrating
applications and artifacts, 43
delegated lists, 47
groups, 47
native directory, 47
roles, 47
security, 47
to a Shared Services server, 43
users, 47
migration considerations
for deployment metadata, 71
for ERP Integrator, 83
for Essbase, 91
for Financial Close Management, 98
for Financial Management, 108
for Performance Management Architect, 119
for Planning, 138
migration data
purging, 54
migration definition
file elements, 60
sample files for Calculation Manager, 77
sample files for ERP Integrator, 84
sample files for Essbase, 93
sample files for Financial Close Management, 99
sample files for Financial Management, 110
sample files for Performance Management Architect, 121
sample files for Performance Scorecard, 126
sample files for Planning, 139
sample files for Profitability and Cost Management, 148
sample files for Reporting and Analysis, 164
sample files for Shared Services, 176
XML schema for, 60
migration options
for Calculation Manager, 76
for deployment metadata, 71
for ERP Integrator, 84
for Essbase, 93
for Financial Close Management, 99
for Financial Management, 109
for Performance Management Architect, 120
for Performance Scorecard, 126
for Planning, 139
for Profitability and Cost Management, 147
for Reporting and Analysis, 164
for Shared Services Native Directory (Security), 170
for Shared Services Taskflows, 176
migration prerequisites
for Calculation Manager, 74
for deployment metadata, 70
for ERP Integrator, 80
for Essbase, 88
for Financial Close Management, 96
for Financial Management, 102
for Performance Management Architect, 114
for Performance Scorecard, 124
for Planning, 130
for Profitability and Cost Management, 143
for Reporting and Analysis, 152
for Shared Services, 168
Lifecycle Management Utility, 17
Shared Services Console, 17
migration properties, 51
migration status report
   purging, 53
   viewing, 53
migration, defined, 13
migrations
   purging status reports, 53
   scheduling, 58
   viewing status, 53
model artifact, 141
model artifacts, 144, 145
modifying, application groups, 36
moving applications, 38

N
Native Directory artifacts, 169
native directory, migrating, 47

O
objects artifacts, 125

P
Performance Management Architect
   about, 113
   application metadata artifacts, 115
   application migrations, 120
   application migrations for Financial Management, 102
   artifact listing, 114
   cross-product artifact dependencies, 120
   data synchronization artifacts, 118
   dimension access artifacts, 118
   export options, 120
   import options, 120
   LCM log files, 122
   migration considerations, 119
   migration options, 120
   migration prerequisites, 114
   product roles, 113
   sample migration definition files, 121
   shared library dimensions artifacts, 117
Performance Management Architect application migrations
   for Planning, 130
Performance Scorecard
   about, 123
   administrative options artifacts, 125
   application migrations, 125
   artifact listing, 124
   cross-product artifact dependencies, 125
   export options, 126
   import options, 126
   LCM log files, 127
   migration options, 126
   migration prerequisites, 124
   objects artifacts, 125
   product roles, 123
   sample migration definition files, 126
   phased submissions artifacts, 105
   physical resources artifacts, 154
   plan type artifacts
      for Planning, 136
Planning
   about, 129
   application migrations, 138
   artifact listing, 131
   configuration artifacts, 132
   cross-product artifact dependencies, 138
   export options, 139
   global artifacts, 133
   import options, 139
   LCM log files, 85, 140
   migration considerations, 138
   migration options, 139
   migration prerequisites, 130
   Performance Management Architect application migrations, 130
   plan type artifacts, 136
   product roles, 129
   relational data artifacts, 132
   sample migration definition files, 139
   security artifacts, 137
Planning Administrator role, 130
Planning roles
   Application Creator, 130
   Planning Administrator, 130
   pop-up blockers, 31
   prerequisites, 17
   product preferences artifacts, 155
   product roles
for Calculation Manager, 73
for ERP Integrator, 80
for Essbase, 87
for Financial Close Management, 95
for Financial Management, 102
for Performance Management Architect, 113
for Performance Scorecard, 123
for Planning, 129
for Profitability and Cost Management, 142
for Reporting and Analysis, 151
for Shared Services, 167
Profitability and Cost Management
about, 141
application migrations, 147
artifact listing, 141, 143
artifacts, 144, 145
cross-product artifact dependencies, 147
export options, 147
import options, 147
LCM log files, 149
migration options, 147
migration prerequisites, 143
model artifact, 141
product roles, 142
sample migration definition files, 148
projects. See application groups
properties, migration, 51

Q
quick start, 20

R
Registration artifacts, 71
relational data artifacts, 132
renaming, application groups
application groups, 36
repeating an export to the file system, 45
Reporting and Analysis
about, 151
admin options artifacts, 160
application migrations, 163
artifact listing, 153
artifact types, 161
classifying job service properties, 152
creating data access service data sources, 153
cross-product artifact dependencies, 163
export options, 164
import options, 164
LCM log files, 165
migration options, 164
migration prerequisites, 152
physical resources artifacts, 154
product preferences artifacts, 155
product roles, 151
repository objects artifacts, 156
sample migration definition files, 164
schedule objects artifacts, 154
security artifacts, 154
reports
artifact, 54
audit, 54
migration status, 53
repository objects artifacts, 156
requirements, 17
roles
Application Administrator, 102
Application Creator, 130
Calc, 88
Database Manager, 88
exceptions, 14
for Calculation Manager, 73
for deployment metadata, 70
for ERP Integrator, 80
for Essbase, 87
for Financial Close Management, 95
for Financial Management, 102
for Performance Management Architect, 113
for Performance Scorecard, 123
for Planning, 129
for Profitability and Cost Management, 142
for Reporting and Analysis, 151
for Shared Services, 167
LCM Administrator, 14
LCM Designer role, 14, 25
migrating, 47
Planning Administrator, 130
Server Access, 88
rule sets artifacts, 75
rules artifacts, 75
for Financial Management, 106
schedule objects artifacts, 154
scheduled migrations, 58
scripts artifacts, 76
Search Artifact option, 42
searching artifacts, 42
security
   for Lifecycle Management, 22
   migrating, 47
Security artifacts
   for Shared Services, 169
security artifacts
   for Financial Management, 104
   for Planning, 137
   for Reporting and Analysis, 154
Selected Artifacts option, 42
Server Access role, 88
shared library dimensions artifacts, 117
Shared Services
   about, 167
   application migrations, 170
   artifact listing, 168
   CSV files for Native Directory (Security), 171
   export options for Native Directory (Security), 170
   high availability and Lifecycle Management, 20
   import options for Native Directory (Security), 170
   LCM log files, 177
   migration options for Native Directory (Security), 170
   migration options for Taskflows, 176
   migration prerequisites, 168
   Native Directory artifacts, 169
   product roles, 167
   sample migration definition files, 176
   Security artifacts, 169
   taskflow artifacts, 170
Shared Services Console
   about, 31
   default credentials, 31
   exporting individual artifacts for editing, 46
   generating artifact reports, 54
   importing from the file system, 45
   importing individual artifacts after editing, 47
   launching, 31
   menus, 33
   migrating artifacts, 43
   migrating native directory artifacts, 47
migrating Shared Services Registry data for editing, 48
migrating to the file system, 43
migration prerequisites, 17
overview of, 33
purging migration data, 54
searching artifacts, 42
toolbar buttons, 33
viewing artifacts, 41
viewing migration status, 53
Shared Services Registry
   editing data, 50
   exporting data, 50
   importing data, 50
   migrating data for editing, 48
   viewing data, 49
Shared Services Registry artifacts, 71
Shared Services server, migrating to, 43
source artifacts or applications, defining, 43
source options, defining, 43

target options, defining, 43
task tabs, 33
taskflow artifacts, 170
templates artifacts, 76

upgrade, defined, 13
use cases, 23
User Management Console. See Shared Services Console
users, migrating, 47

View pane, 33
viewing
   Shared Services Registry data, 49
   viewing artifacts, 41