



ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.2

Migrating Oracle Hyperion Performance Management
Architect Applications



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About This Document

This document is a tutorial on how to migrate an Oracle Hyperion EPM Architect based Oracle Hyperion Financial Management application from one environment to another using the Oracle Hyperion Enterprise Performance Management System Lifecycle Management console. The steps include artifacts of Performance Management Architect and related components including Financial Management, Oracle Hyperion Calculation Manager, and Oracle Hyperion Shared Services artifacts.

Migrating Performance Management Architect applications through the Lifecycle Management console requires two passes. However, the same results can be achieved in a single pass by leveraging the command-line utilities of Lifecycle Management and Performance Management Architect.

The first two exercises in this document walk you through the steps needed to migrate artifacts from one environment to another using the Oracle Hyperion Enterprise Performance Management System Lifecycle Management console. The third exercise walks you through the command line approach.

- [Exercise 1: Importing a Performance Management Architect Application](#)

This exercise provides steps to import an entire Performance Management Architect application in two migrations. – 15 Minutes

- [Exercise 2: Exporting a Performance Management Architect Application](#)

This exercise provides steps to export all the related artifacts for a Performance Management Architect application in a single migration. – 15 Minutes

- [Exercise 3: Importing a Performance Management Architect Application Using a Batch Script](#)

This exercise provides steps to import all the related artifacts for a Performance Management Architect application in a single migration using command-line utilities. – 15 Minutes

Note: Use the Shared Services native admin user to perform the procedures in these exercises.

Setting Up the Environment

Subtopics

- [Building an Environment](#)
- [Downloading Sample Data](#)

Building an Environment

Before you start the exercises in this document, do the following:

- Set up a Release 11.1.2.2 environment configured with the following products:
 - Performance Management Architect

- Financial Management
- Oracle Hyperion Foundation Services
- Complete the following steps to apply a Performance Management Architect patch:
 1. Navigate to `ORACLE_HOME\EPMSysystem11R1\products\Foundation\BPMA\AppServer\InstallableApps`.
 2. Open `epmawebtier.ear` and navigate to `awb.war\WEB-INF\conf\`.
 3. Replace the `lcmArtifacts.xml` file that is available in the copied folder – `LCMWorkshops`.
 4. Restart the Oracle Fusion Performance Management Web application.
 5. Restart Oracle Hyperion Foundation Services.

Downloading Sample Data

Note: You must use the 7-Zip software to unzip the sample data used in these exercises. Please download it before proceeding. Using other archiving utilities might result in migration errors.

You will need some sample data for these exercises. To download the sample data:

1. Go to the Oracle Documentation Library on Oracle® Technology Network (<http://www.oracle.com/technology/documentation/epm.html>).
2. Under **Oracle Enterprise Performance Management System Release 11.1.2.2**, click **View Library**.
3. On the **Foundation Services** tab, download the file titled **Migrating Oracle Hyperion Performance Management Architect Applications - Data**, and unzip its content to `EPM_ORACLE_INSTANCE\import_export`.

If the `import_export` folder does not exist, you must create it

You must use 7-Zip to unzip the contents of the file. The name of the actual zip file is `epm_migrate_epma_app_data.zip`.

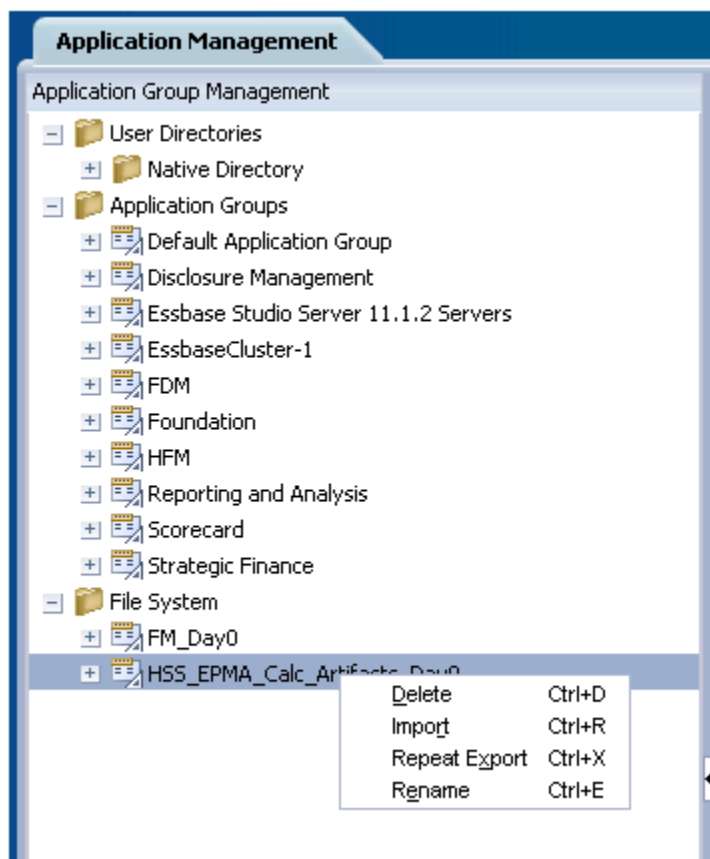
Exercise 1: Importing a Performance Management Architect Application

Subtopics

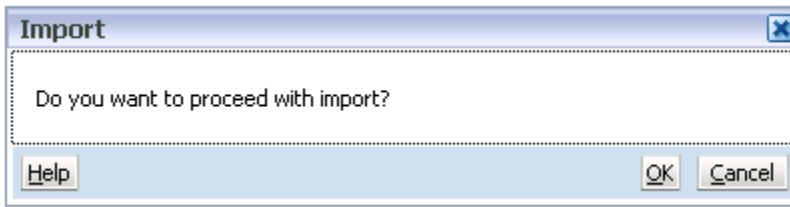
- [Step 1: Import Performance Management Suite Artifacts Using Lifecycle Management](#)
- [Step 2: Deploy the Performance Management Application and Calculation Manager Rules](#)
- [Step 3: Import Financial Management Artifacts Using Lifecycle Management](#)

Step 1: Import Performance Management Suite Artifacts Using Lifecycle Management

- To import Performance Management Suite artifacts using Lifecycle Management:
- 1 Log in to Oracle Hyperion Shared Services Console (<http://<host>:<port>/interop/index.jsp>).
 - 2 Expand **File System**, right-click **HSS_EPMA_Calc_Artifacts_Day0**, and select **Import**.



- 3 Click **OK** when asked if you want to proceed with the import.



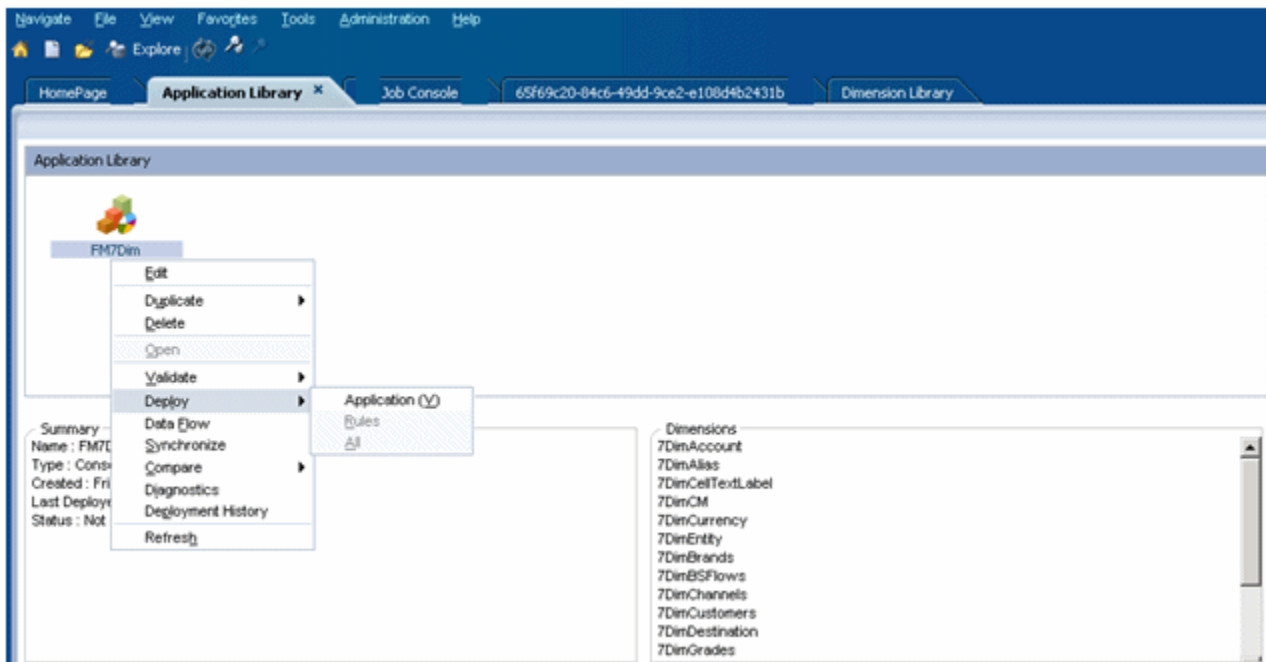
4 Wait for the import operation to complete.

User	Source	Destination	Start Time	Completed Time	Duration	Status
admin	HSS_EPMA_Calc_Artifacts_Day0\...	- EPM Architect	April 20, 2012 11:34:59			In Progress
	32 out of 32 artifact(s) processed					
	HSS_EPMA_Calc_Artifacts_Day0\...	- Shared Services				
		Not Started				
	HSS_EPMA_Calc_Artifacts_Day0\...	- Calculation Manager				
		Not Started				

Step 2: Deploy the Performance Management Application and Calculation Manager Rules

➤ To deploy the Performance Management Application and Calculation Manager rules:

- 1 Log in to Oracle Hyperion Enterprise Performance Management Workspace (<http://<host>:<port>/workspace/index.jsp>).
- 2 Select **Navigate**, then **Administer**, and then **Application Library**.
- 3 Right-click the application **FM7Dim** and select **Deploy**, and then **Application**.



4 In the Deploy dialog box, keep the default settings and click **Deploy**.

Deploy

Application Name: FM7Dim

Description:

Notes:

Instance Name: FINANCIAL_MANAGEMENT_LWA

Web Server: stm10219.us.oracle.com

Application Server: stm10219

Shared Services Project: Default Application Group

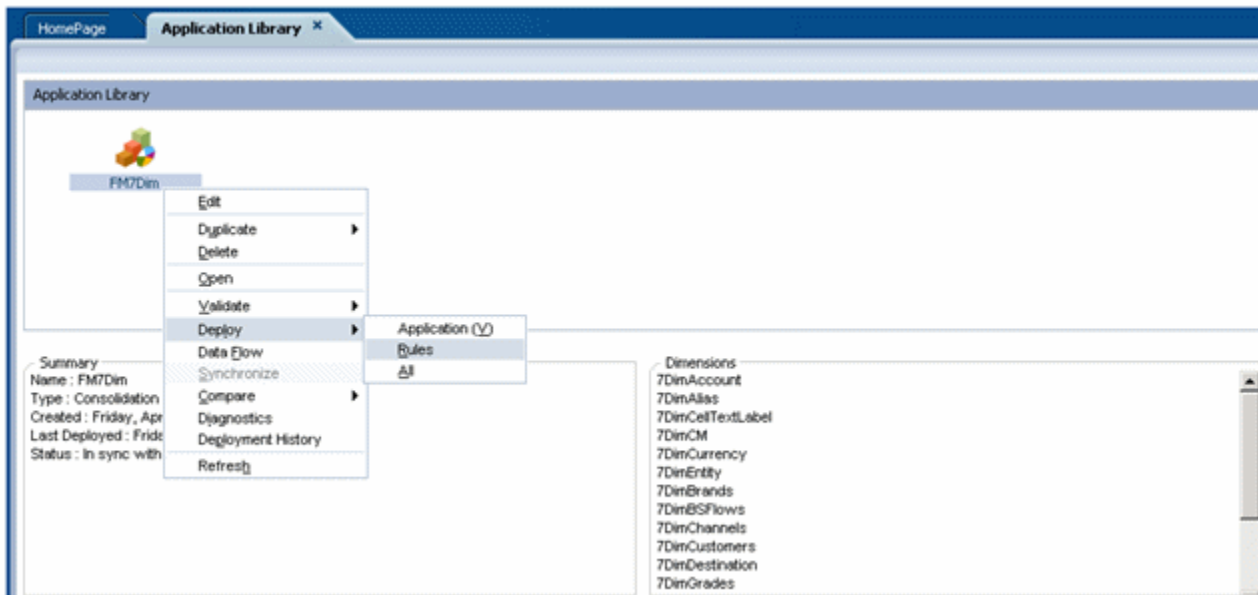
Clear All Metadata and Data:

Check Referential Integrity:

Full Deploy:

Buttons: Help, Deploy, Cancel

- 5 Go to the Job console and wait for the deploy operation to complete.
- 6 Right-click the application **FM7Dim** and select **Deploy**, and then **Rules**.

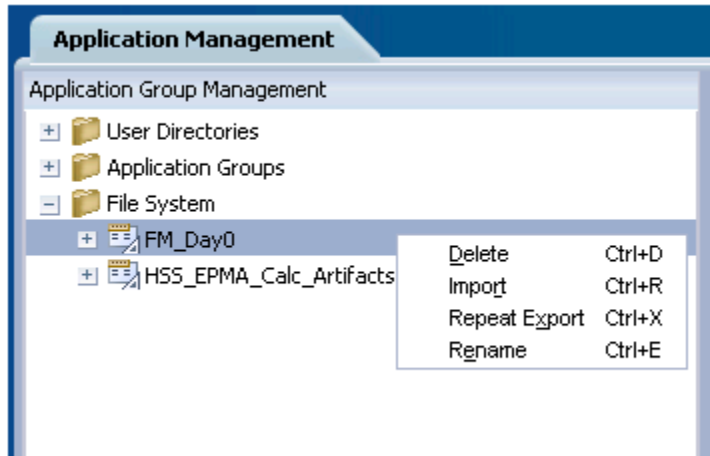


- 7 Go to the Job console and wait for the deploy operation to complete.

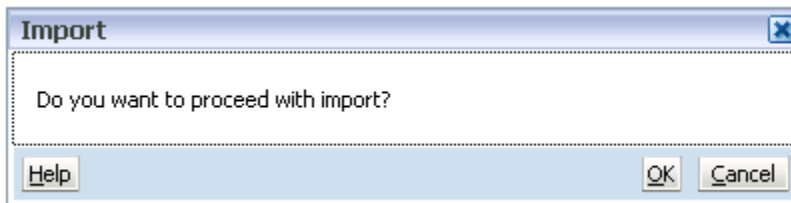
Step 3: Import Financial Management Artifacts Using Lifecycle Management

► To import Financial Management artifacts using Lifecycle Management:

- 1 Log in to Shared Services Console (<http://<host>:<port>/interop/index.jsp>).
- 2 Expand **File System**, right-click on the folder **FM_Day0**, and select **Import**.



- 3 Select **OK** when asked if you want to proceed with the import.



This launches the Migration Status Report.

- 4 Wait for the import operation to complete.

User	Source	Destination	Start Time	Completed Time	Duration	Status
admin	FM_Day0\FM-FM7DIM 44 out of 44 artifact(s) processed	- FM7DIM	April 20, 2012 12:09:56			In Progress

Exercise 2: Exporting a Performance Management Architect Application

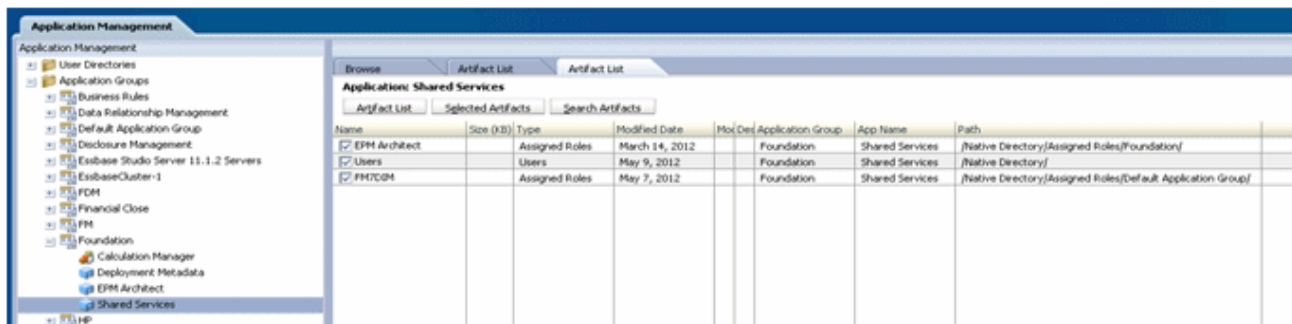
Subtopics

- Step 1: Export Shared Services, Performance Management Architect, and Calculation Manager Artifacts from the Source
- Step 2: Export Financial Management Artifacts from the Source

Step 1: Export Shared Services, Performance Management Architect, and Calculation Manager Artifacts from the Source

► To export Shared Services, Performance Management Architect, and Calculation Manager artifacts from the source:

- 1 Log in to Oracle Hyperion Shared Services Console (<http://<host>:<port>/interop/index.jsp>).
- 2 Expand **Application Groups**, then **Foundation**, and then **Shared Services**. Select the following users and provisioning artifacts:
 - Default Application Group/FM7Dim
 - Foundation/EPM Architect



- 3 Expand **Application Groups**, then **Foundation**, and then **EPM Architect**. Select the following artifacts:
 - Application Metadata/ConsolidationApplications/FM7Dim
 - Dimension Access/Import Profiles/MGApp
 - SharedLibraryDimensions/7Dim*

Application Management

Application Management

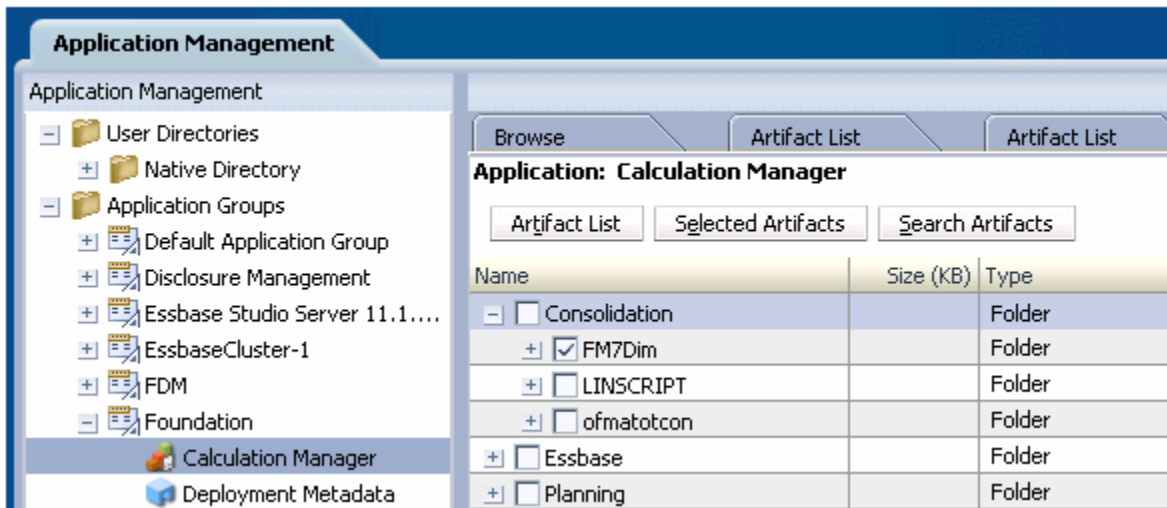
- User Directories
 - Native Directory
- Application Groups
 - Default Application Group
 - Disclosure Management
 - Essbase Studio Server 11.1....
 - EssbaseCluster-1
 - FDM
 - Foundation
 - Calculation Manager
 - Deployment Metadata
 - EPM Architect**
 - Shared Services
 - HFM
 - Reporting and Analysis
 - Scorecard
 - Strategic Finance
- File System
 - FM_Day0
 - HSS_EPMA_Calc_Artifacts_...

Application: EPM Architect

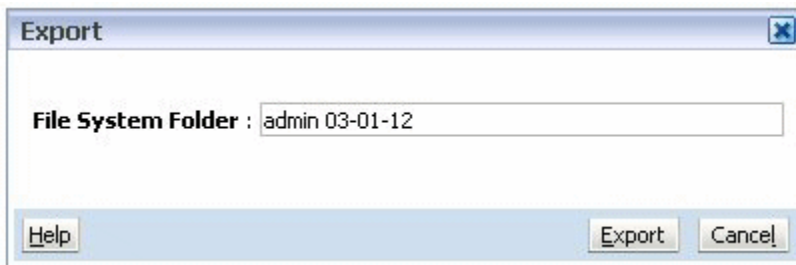
Artifact List | Selected Artifacts | Search Artifacts

Name	Size (KB)	Type	Modified Date
<input type="checkbox"/> Application Metadata		Folder	
<input checked="" type="checkbox"/> Consolidation Applications		Folder	
<input checked="" type="checkbox"/> FM7Dim		Folder	
<input type="checkbox"/> Essbase (ASO) Applications		Folder	
<input type="checkbox"/> Essbase (BSO) Applications		Folder	
<input type="checkbox"/> Generic Application Views		Folder	
<input type="checkbox"/> Planning Applications		Folder	
<input type="checkbox"/> Profitability Applications		Folder	
<input type="checkbox"/> Data Synchronization		Folder	
<input type="checkbox"/> Dimension Access		Folder	
<input type="checkbox"/> Import Profiles		Folder	
<input type="checkbox"/> Interfacetables		Import Profile	April 13, 2012
<input checked="" type="checkbox"/> MGApp		Import Profile	April 20, 2012
<input type="checkbox"/> Shared Library Dimensions		Folder	
<input checked="" type="checkbox"/> 7DimAccount		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimAlias		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimBrands		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimBSFlows		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimCellTextLabel		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimChannels		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimCM		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimCurrency		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimCustomers		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimDestination		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimEntity		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimGrades		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimICP		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimPeriod		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimProducts		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimScenario		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimSecClass		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimValue		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimView		SharedDimension	April 20, 2012
<input checked="" type="checkbox"/> 7DimYear		SharedDimension	April 20, 2012

- 4 Expand **Application Groups**, then **Foundation**, and then **Calculation Manager**. Select the following artifact:
- Consolidation/FM7Dim



- 5 Click **Export**.
- 6 In the Export dialog box, enter the File System Folder name and click **Export**.



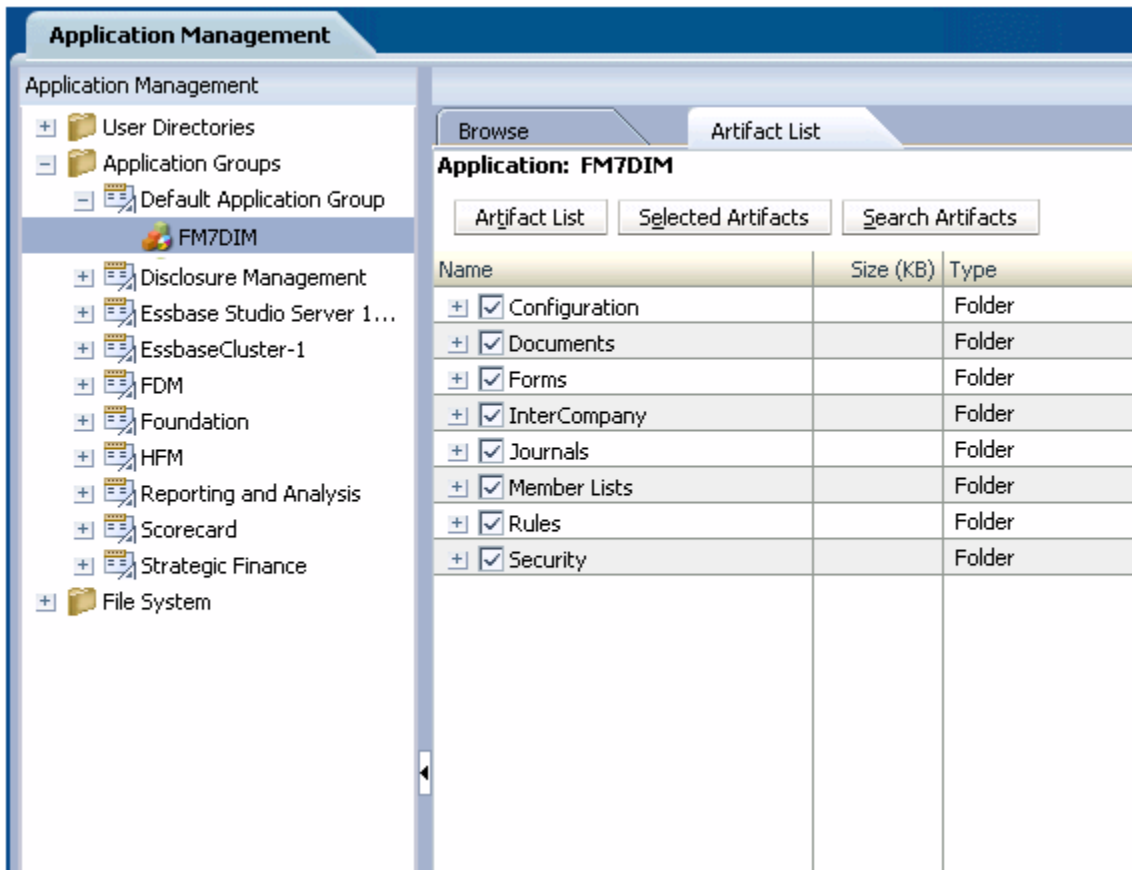
This launches the Migration Status Report.

- 7 Wait for the export operation to complete.

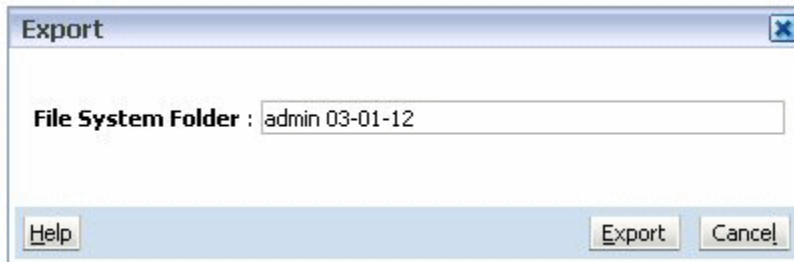
admin	EPM Architect Shared Services Calculation Manager	- - -	HSS_EPMA_Calc_Artifacts_Day01... HSS_EPMA_Calc_Artifacts_Day01... HSS_EPMA_Calc_Artifacts_Day01...	April 20, 2012 09:37:28	April 20, 2012 09:38:30	00:01:02	Completed
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Step 2: Export Financial Management Artifacts from the Source

- To export Financial Management artifacts from the source:
 - 1 Expand **Application Groups**, then **Default Application Group**, and then **FM7DIM**.
 - 2 Click **Select All** to select all the artifacts.



- 3 Click **Export**.
- 4 In the Export dialog box, enter the File System Folder name and click **Export**.



This launches the Migration Status Report.

- 5 Wait for the export operation to complete.

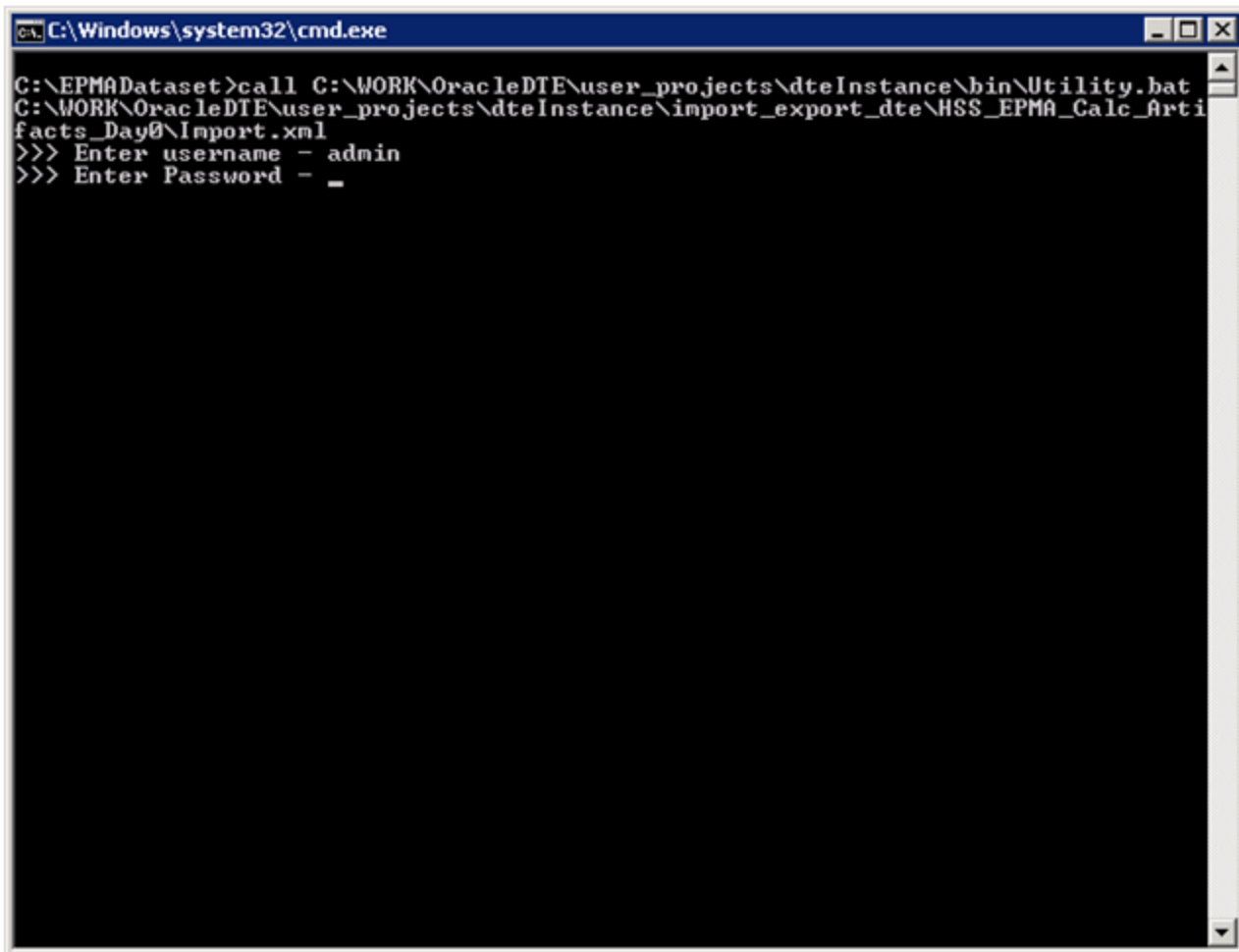
admin	FM7DIM	-	FM_Day0\FM-FM7DIM	April 20, 2012 09:39:26	April 20, 2012 09:39:38	00:00:12	Completed
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Exercise 3: Importing a Performance Management Architect Application Using a Batch Script

► To import a Performance Management Architect application using a batch script:

- 1 Go to `<EPM_ORACLE_INSTANCE>\import_export\` and open the file `test.txt`.

- 2 In `test.txt`, replace the following place holders with actual values that are applicable to your environment and save the file after editing:
 - `<bpmaserverurl>`: URL to the Oracle Hyperion EPM Architect server; for example, `http://localhost/hyperion-bpma-server/`.
 - `<workspaceurl>`: Workspace URL; for example, `http://localhost:19000/workspace`.
 - `<username>`: Shared Services admin username.
 - `<password>`: Shared Services admin password.
 - `<ApplicationServer>`: Oracle Hyperion Financial Management application server.
- 3 Open the `epma.bat` file.
- 4 In `epma.bat`, replace the following place holders with actual values that are applicable to your environment, and save the file after editing.
 - `<EPM_ORACLE_INSTANCE>`
 - `<ORACLE_HOME>`
- 5 Double click `epma.bat`.
- 6 Enter the Oracle Hyperion Shared Services admin user credentials when prompted.



```
C:\Windows\system32\cmd.exe
C:\EPMADataSet>call C:\WORK\OracleDTE\user_projects\dteInstance\bin\Utility.bat
C:\WORK\OracleDTE\user_projects\dteInstance\import_export_dte\HSS_EPMA_Calc_Arti
facts_Day0\Import.xml
>>> Enter username - admin
>>> Enter Password - _
```


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