

ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

*Release 11.1.2.4*

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

**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, set up a Release 11.1.2.4 environment configured with the following products:

- Oracle Hyperion EPM Architect
- Oracle Hyperion Financial Management
- Oracle Hyperion Foundation Services

## Downloading Sample Data

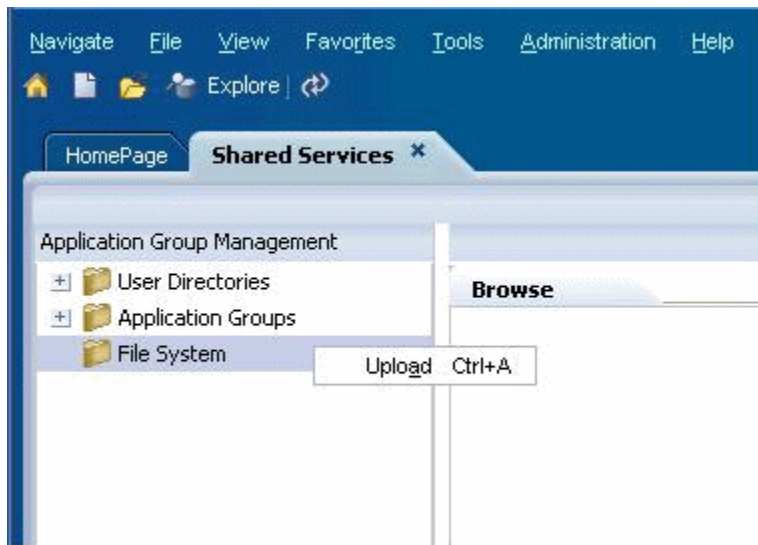
**Note:** You must use the 7-Zip software to unzip the sample data used in these exercises. Please download it before proceeding. Using other archiving utilities might result in migration errors.

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 11.1.2.4**, click **View Library**.
3. On the **Foundation Services** tab, download the file titled **Migrating Oracle Hyperion Planning Applications - Data**, and unzip its content to your desktop.

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`.

4. Log in to Oracle Hyperion Enterprise Performance Management Workspace, `http://web_server_name:port_number/workspace`, and then select **Navigate**, then **Administer**, and then **Shared Services Console**.
5. In Oracle Hyperion Shared Services Console, right-click the **File System** node, and then select **Upload**.



6. Browse to **FM\_Day0.zip**, and then select **Upload**.
7. Browse to **HSS\_EPMA\_Calc\_Artifacts\_Day0.zip**, and then select **Upload**.

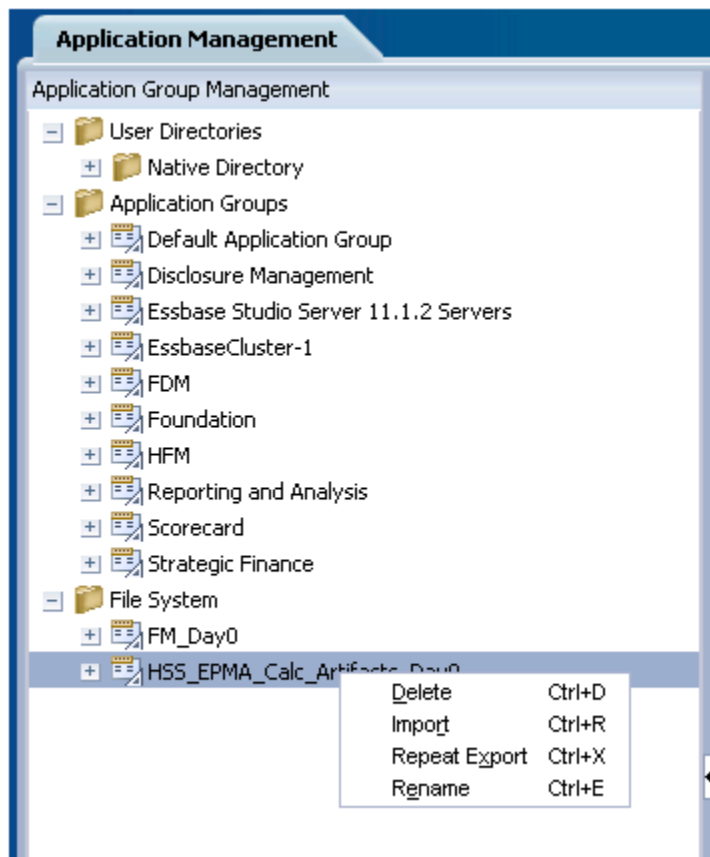
# Exercise 1: Importing a Performance Management Architect Application

## Subtopics

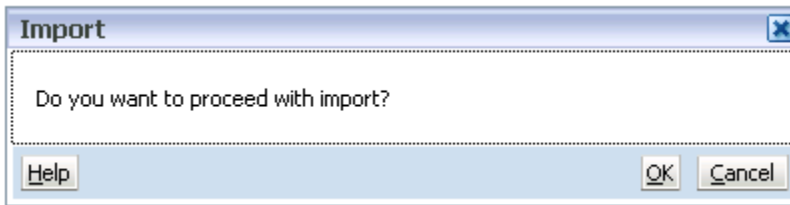
- [Step 1: Import Performance Management Suite Artifacts Using Lifecycle Management](#)
- [Step 2: Deploy the Performance Management Application and Calculation Manager Rules](#)
- [Step 3: Import Financial Management Artifacts Using Lifecycle Management](#)

## Step 1: Import Performance Management Suite Artifacts Using Lifecycle Management

- To import Performance Management Suite artifacts using Lifecycle Management:
- 1 Log in to EPM Workspace ([http://web\\_server\\_name:port\\_number/workspace](http://web_server_name:port_number/workspace)), and then launch Shared Services Console (select **Navigate**, then **Administer**, and then **Shared Services Console**).
  - 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.

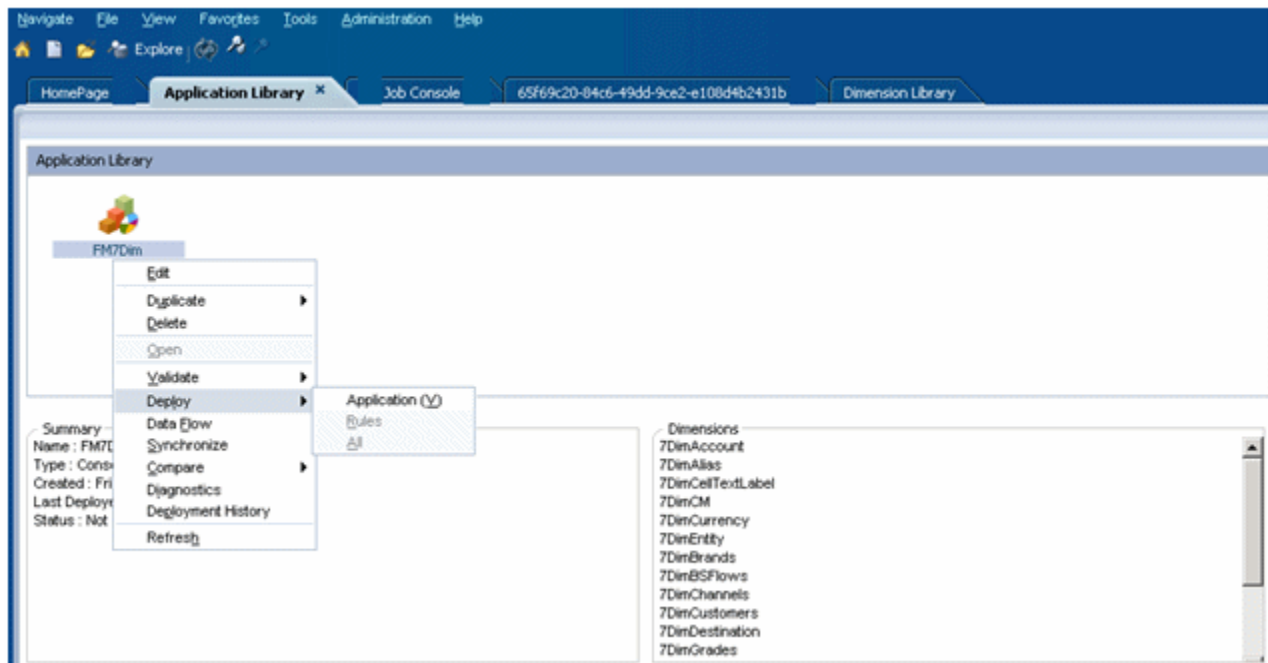
User	Source	Destination	Start Time	Completed Time	Duration	Status
admin	HSS_EPMA_Calc_Artifacts_Day0\...	- EPM Architect	April 20, 2012 11:34:59			In Progress
	32 out of 32 artifact(s) processed					
	HSS_EPMA_Calc_Artifacts_Day0\...	- Shared Services				
		Not Started				
	HSS_EPMA_Calc_Artifacts_Day0\...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

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

**Note:** If warnings are displayed when deploying from the Application Library, continue to deploy the application.

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

- 1 Log in to EPM Workspace (<http://host:port/workspace>).
- 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

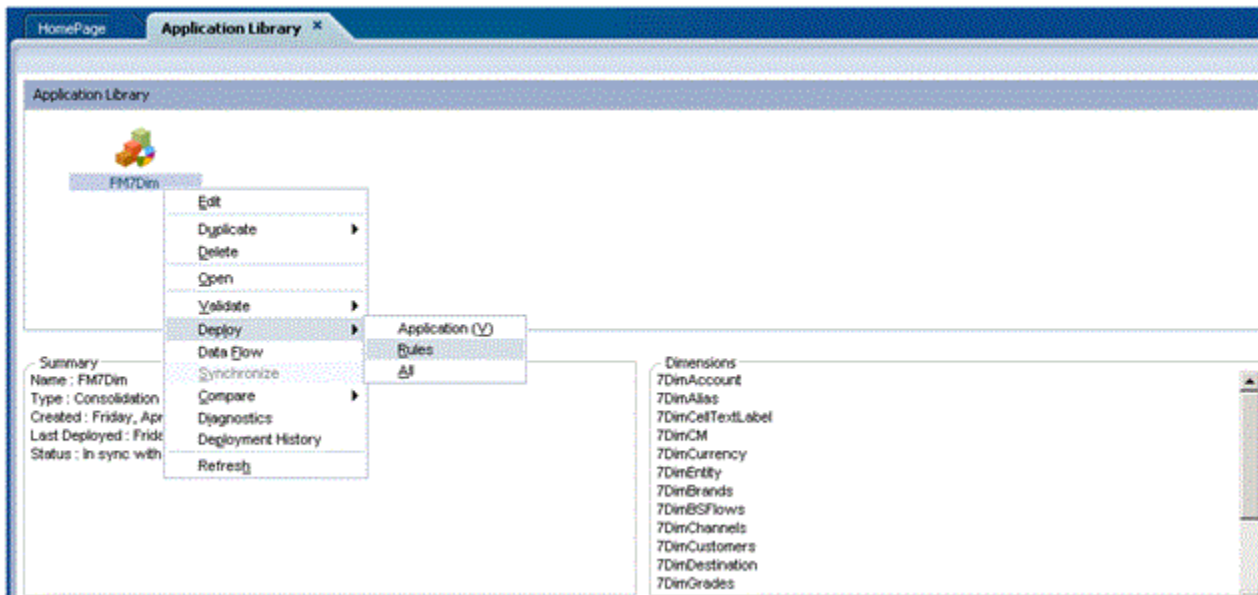
Clear All Metadata and Data:

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**.

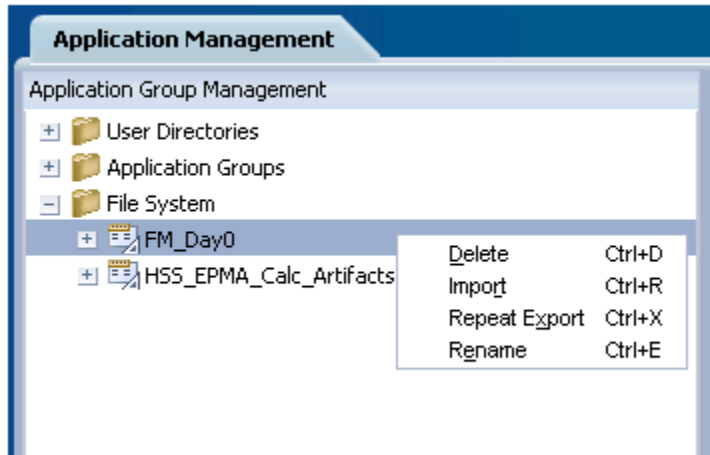


- 7 Go to the Job console and wait for the deploy operation to complete.

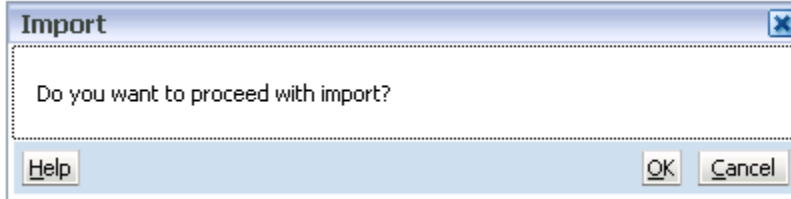
## Step 3: Import Financial Management Artifacts Using Lifecycle Management

➤ To import Financial Management artifacts using Lifecycle Management:

- 1 Log in to EPM Workspace ([http://web\\_server\\_name:port\\_number/workspace](http://web_server_name:port_number/workspace)), and then launch Shared Services Console (select **Navigate**, then **Administer**, and then **Shared Services Console**).
- 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

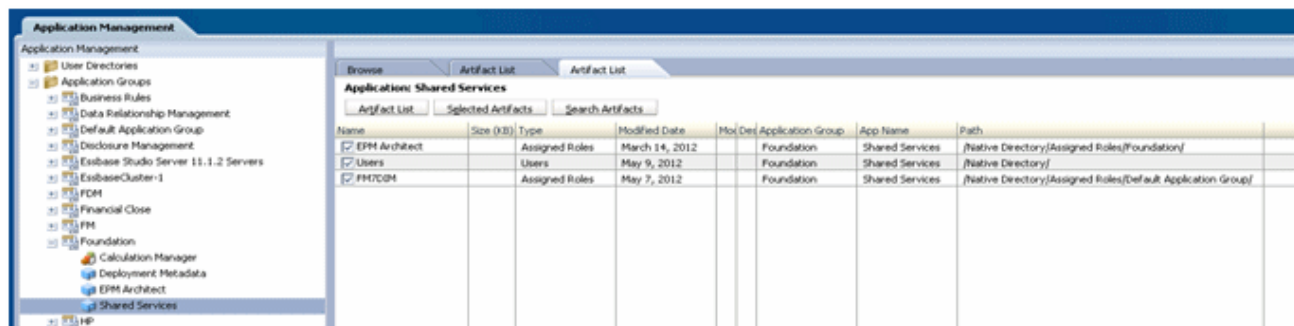
## Subtopics

- 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 Enterprise Performance Management Workspace ([http://web\\_server\\_name:port\\_number/workspace](http://web_server_name:port_number/workspace)), and then launch Oracle Hyperion Shared Services Console (select **Navigate**, then **Administer**, and then **Shared Services Console**).
- 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\_...

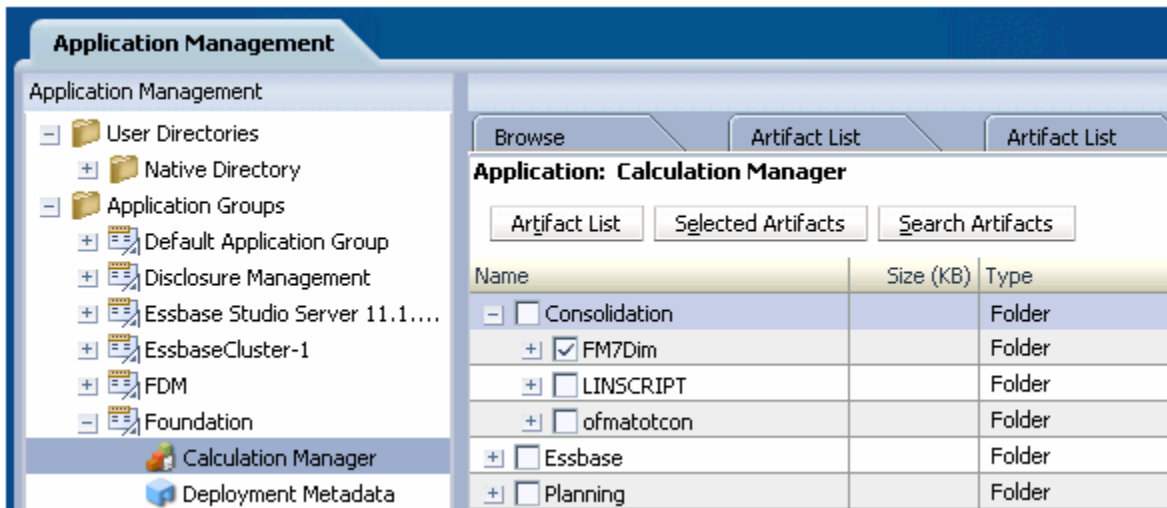
**Application: EPM Architect**

Artifact List | Selected Artifacts | Search Artifacts

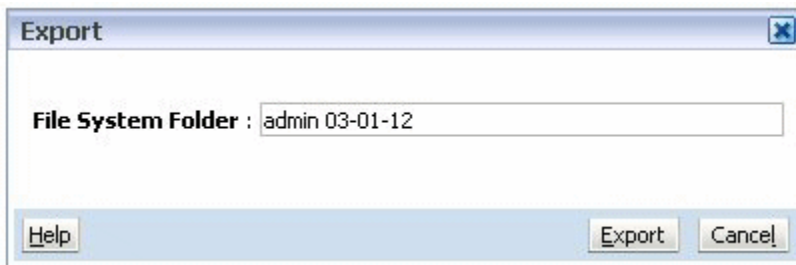
Name	Size (KB)	Type	Modified Date
<input type="checkbox"/> Application Metadata		Folder	
<input checked="" type="checkbox"/> Consolidation Applications		Folder	
<input checked="" type="checkbox"/> FM7Dim		Folder	
<input type="checkbox"/> Essbase (ASO) Applications		Folder	
<input type="checkbox"/> Essbase (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.

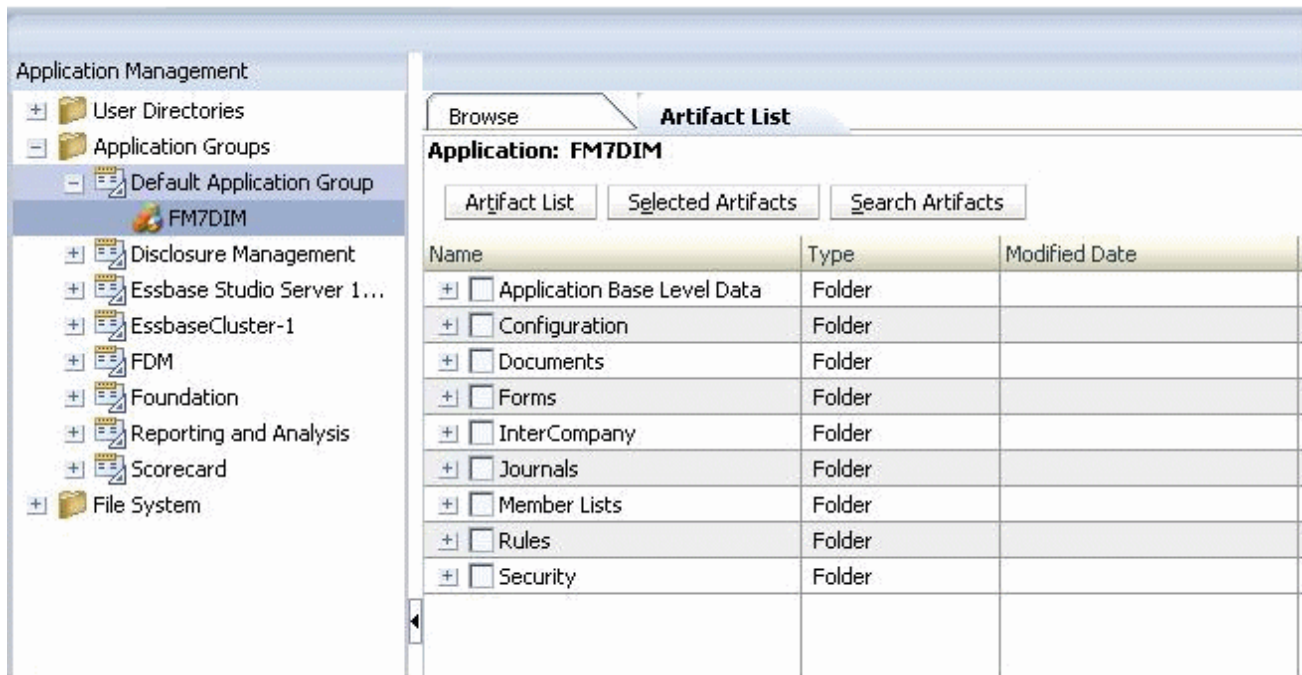
- 7 Wait for the export operation to complete.

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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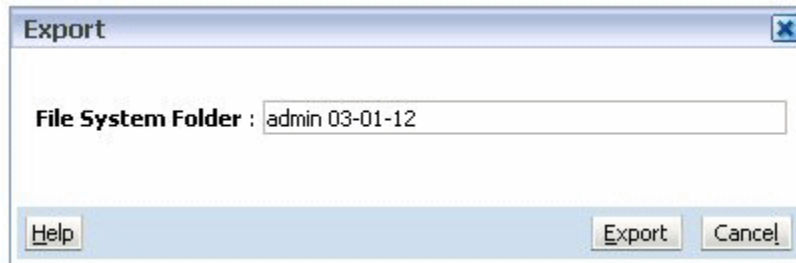
- 8 Optional: Download the exported artifacts by right-clicking the exported File System folder and selecting **Download**.

## 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 except for the “Application Snapshot” folder.
- 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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- 6 Optional: Download the exported artifacts by right-clicking the exported File System folder and selecting **Download**.

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