ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.4

Migrating Oracle Hyperion Performance Management
Architect Applications

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CONTENTS IN BRIEF

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**.
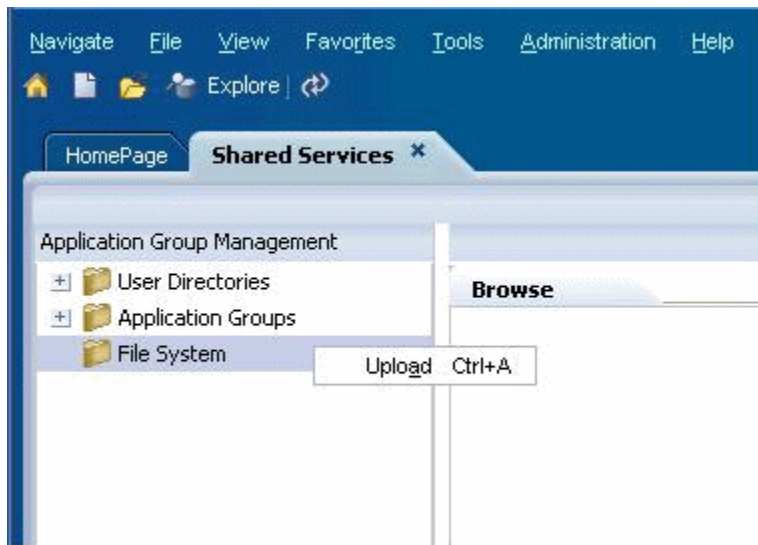
6. Browse to **FM_Day0.zip**, and then select **Upload**.

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`), 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**.
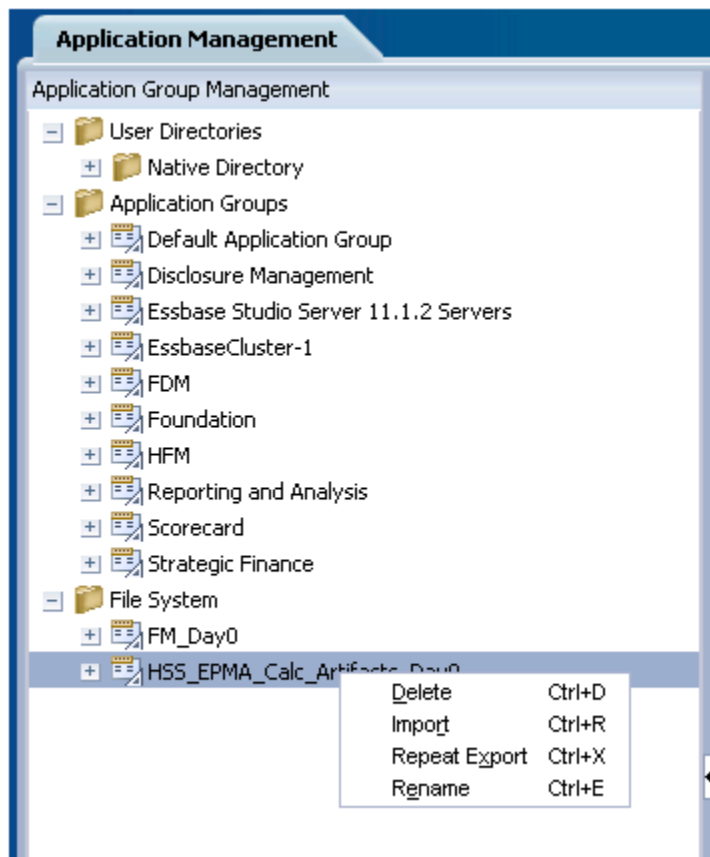
3   Click **OK** when asked if you want to proceed with the import.
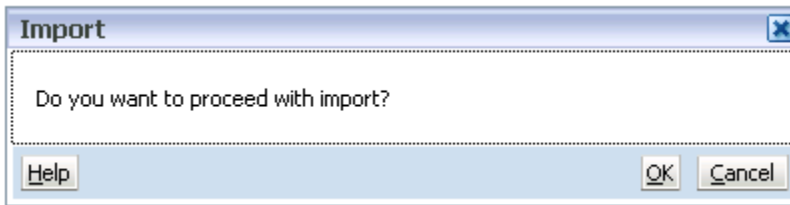
Import

Do you want to proceed with import?

Help   OK   Cancel

4 Wait for the import operation to complete.

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

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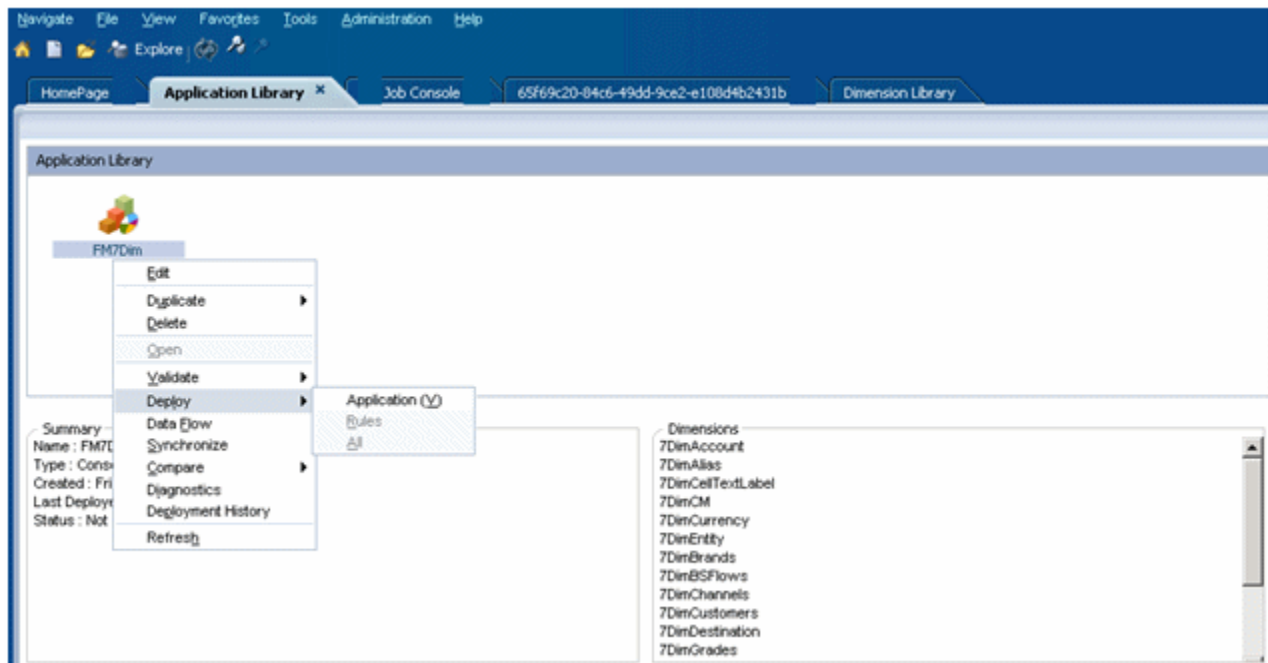
4 In the Deploy dialog box, keep the default settings and click **Deploy**.

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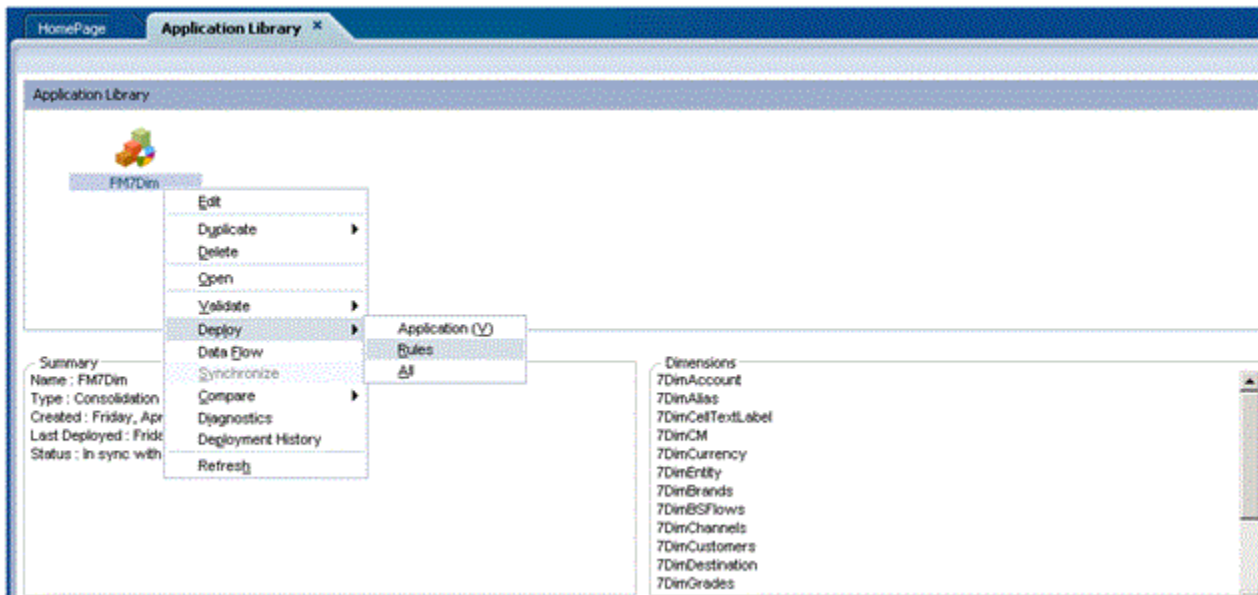
7   Go to the Job console and wait for the deploy operation to complete.

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`), 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**.
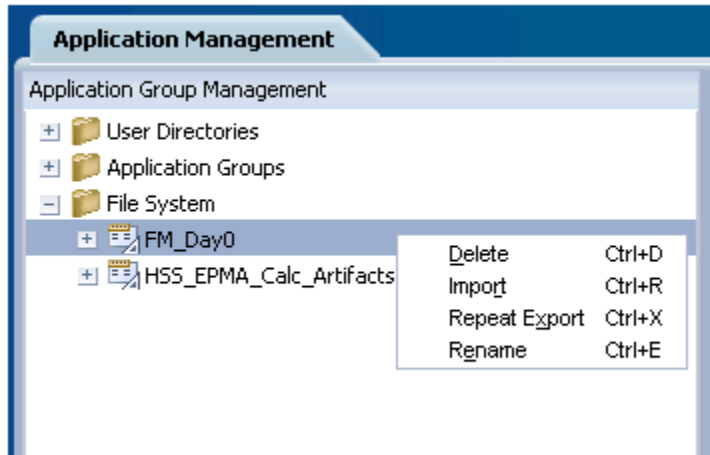
3 Select **OK** when asked if you want to proceed with the import.
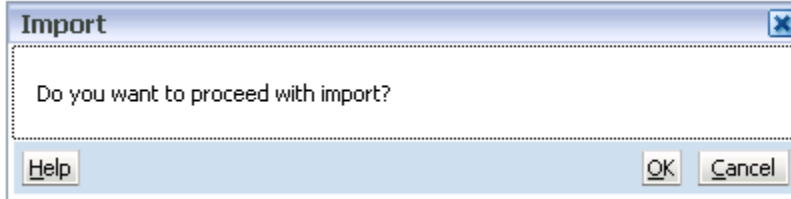
This launches the Migration Status Report.

4 Wait for the import operation to complete.

User	Source	-	Destination	Start Time	Completed Time	Duration	Status
admin	FM_Day0\HFM-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

➤ 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`), 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`
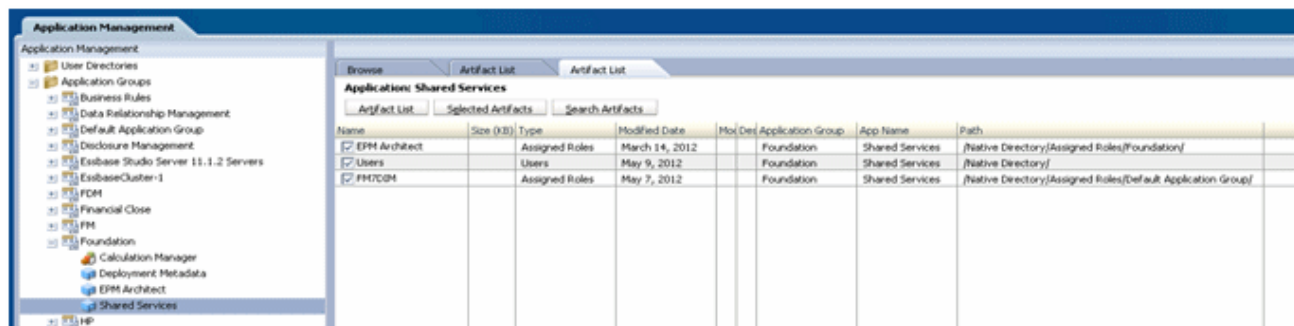
3   Expand **Application Groups**, then **Foundation**, and then **EPM Architect**. Select the following artifacts:

   - `Application Metadata/ConsolidationApplications/FM7Dim`

   - `Dimension Access/Import Profiles/MGApp`

   - `SharedLibraryDimensions/7Dim*`

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

```
Consolidation/FM7Dim
```
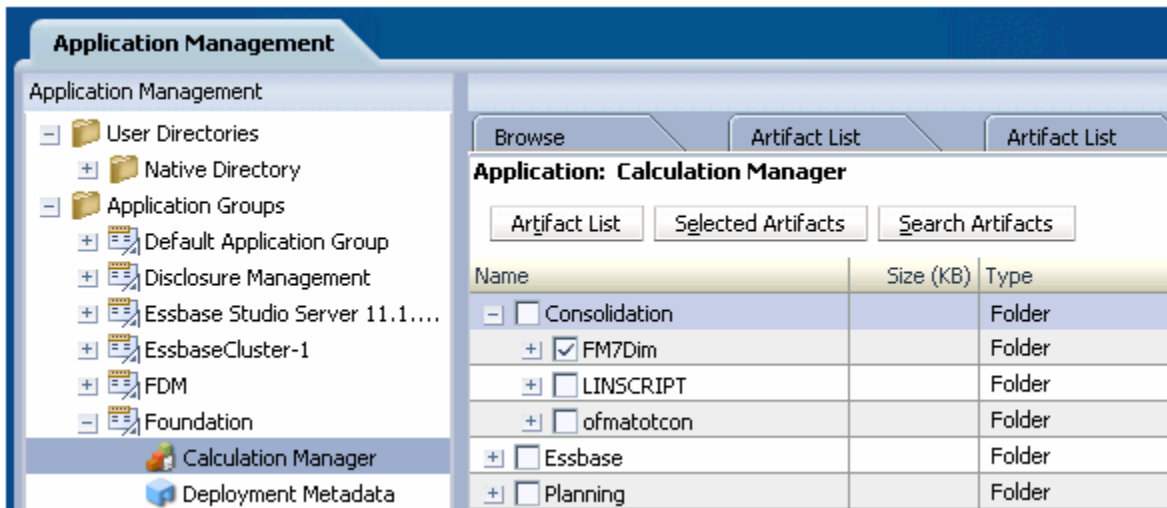
5   Click **Export**.

6   In the Export dialog box, enter the File System Folder name and click **Export**.
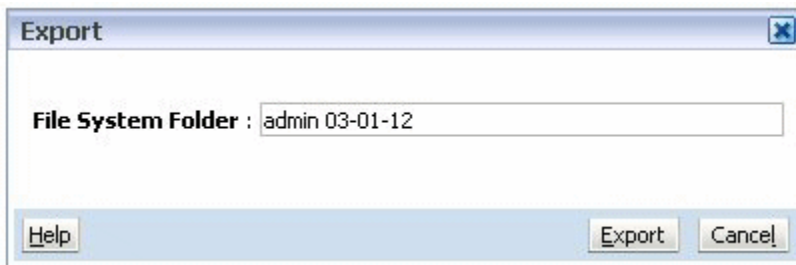
     This launches the Migration Status Report.

7   Wait for the export operation to complete.

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**.
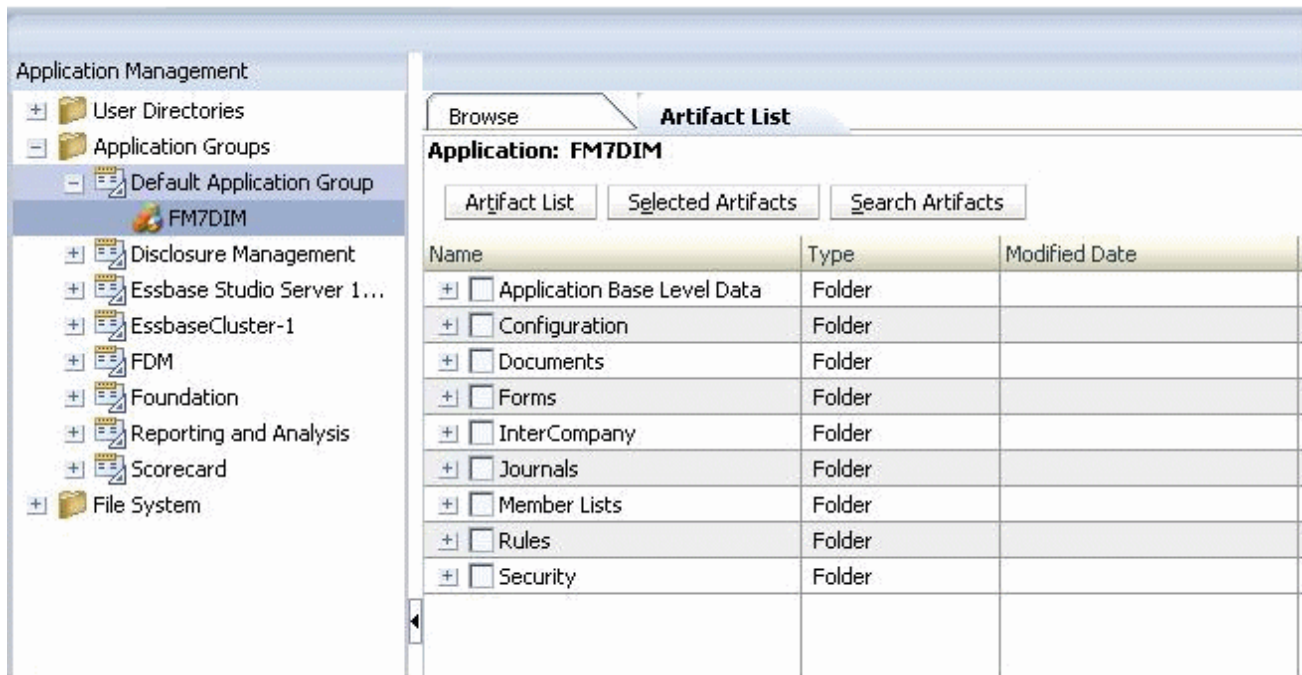
2   Click **Select All** to select all the artifacts except for the "Application Snapshot" folder.

3   Click **Export**.

4   In the Export dialog box, enter the File System Folder name and click **Export**.
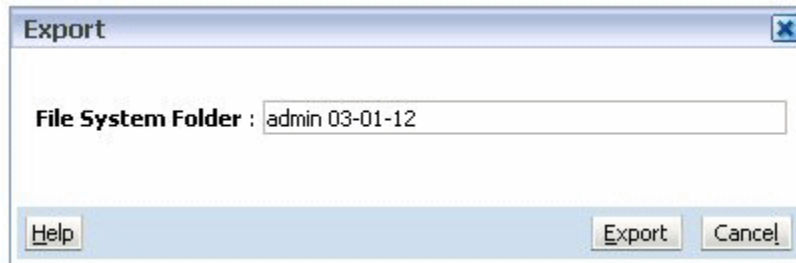
This launches the Migration Status Report.

5   Wait for the export operation to complete.

| admin | FM7DIM | - | FM_Day0JHFM-FM7DIM | April 20, 2012 09:39:26 | April 20, 2012 09:39:38 | 00:00:12 | Completed |

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

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