



ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

*Release 11.1.2.4*

Migrating Oracle Hyperion Financial Management  
Applications



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## About This Document

This document is a tutorial on how to migrate an Oracle Hyperion Financial Management application from one environment to another. The steps include artifacts and data of Financial Management and related components including Oracle Hyperion Calculation Manager, Oracle Hyperion Financial Data Quality Management, Enterprise Edition, Oracle Hyperion Financial Reporting, and Oracle Hyperion Shared Services artifacts.

There are three exercises in this document that walk you through the steps needed to migrate artifacts and data from one environment to another.

- [Exercise 1: Importing Financial Management Suite Artifacts and Data](#)

This exercise provides steps to import an entire pre-built Financial Management application suite. – 5 Minutes

- [Exercise 2: Validating the Import](#)

This exercise provides steps to validate if the imported applications are functioning correctly. – 15 Minutes

- [Exercise 3: Exporting Financial Management Suite Artifacts and Data](#)

This exercise provides steps to export the Financial Management application suite that you imported in Exercise 1. – 15 Minutes.

**Note:** You can also combine and migrate Oracle Hyperion Financial Close Management artifacts, but this document does not include these artifacts.

## Setting Up the Environment

### Subtopics

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

## Building an Environment

Before you start these exercises, you will need an environment. To build this environment, follow the steps in the guide titled *Oracle Enterprise Performance Management System Rapid Deployment of Oracle Hyperion Financial Management in Development Environments* located at: [http://stdoc-web02.idc.oracle.com:8080/downloads/E40248\\_01/index.htm](http://stdoc-web02.idc.oracle.com:8080/downloads/E40248_01/index.htm).

## 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. Create the following folder:  
C:\HFMDataset
2. Go to the Oracle Documentation Library on Oracle® Technology Network (<http://www.oracle.com/technology/documentation/epm.html>).
3. Under **Oracle Enterprise Performance Management System Release 11.1.2.4**, click **View Library**.
4. On the **Foundation Services** tab, download the file titled **Migrating Oracle Hyperion Financial Management Applications - Data**, and unzip its content to C:\HFMDataset.  
You must use 7-Zip to unzip the contents of the file. The name of the actual zip file is `epm_migrate_hfm_app_data.zip`.
5. 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**.
6. In Oracle Hyperion Shared Services Console, right-click the **File System** node, and then select **Upload**.
7. Browse to **TotConsolAppSuite.zip**, and then select **Upload**.

## Exercise 1: Importing Financial Management Suite Artifacts and Data

**Note:** You must use the Shared Services native admin user to perform the steps in this exercise. If you have configured Oracle Enterprise Performance Management System with a username other than `admin`, make sure to log in to Oracle Hyperion Shared Services and rename the native admin user to `admin`.

- To import Financial Management Suite artifacts using Lifecycle Management:
- 1 Log in to EPM Workspace (`http://web_server_name:port_number/workspace`), and then select **Navigate**, then **Administer**, and then **Shared Services Console**.
  - 2 Expand **File System**, then right-click **TotConsolAppSuite**, and then select **Import**.

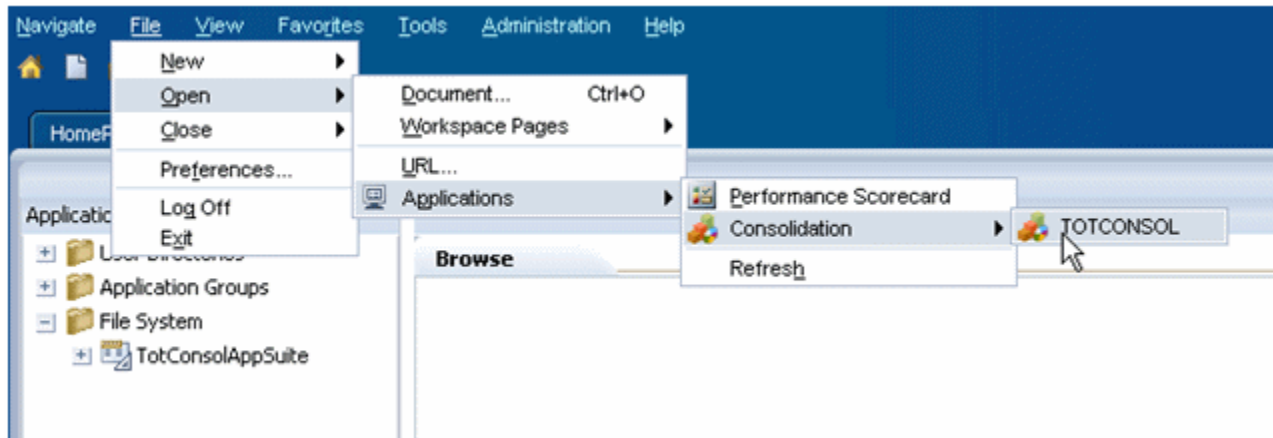


## Exercise 2: Validating the Import

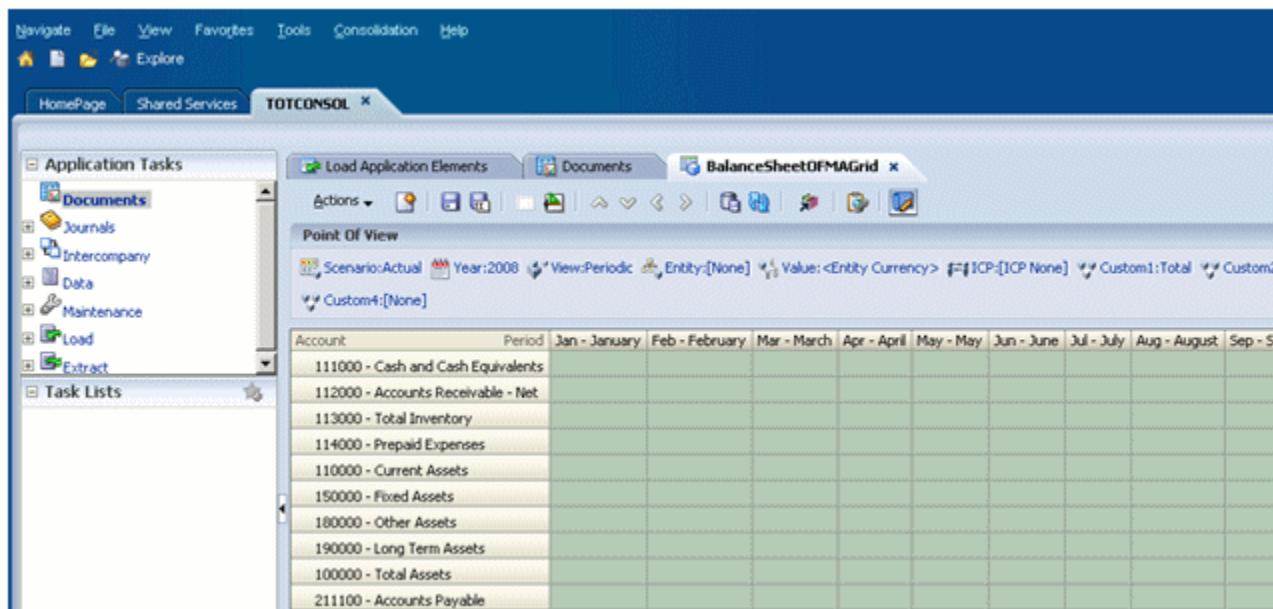
► To validate the import:

- 1 In EPM Workspace, verify that the Oracle Hyperion Financial Management application **TOTCONSOL** has been created.

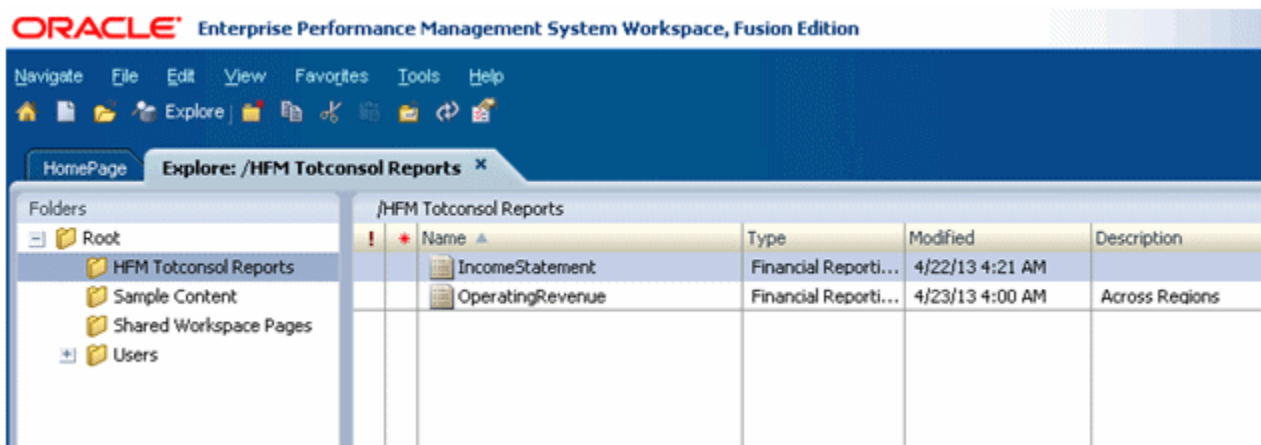
Select **File**, then **Open**, then **Applications**, then **Consolidation**, and then **TOTCONSOL**



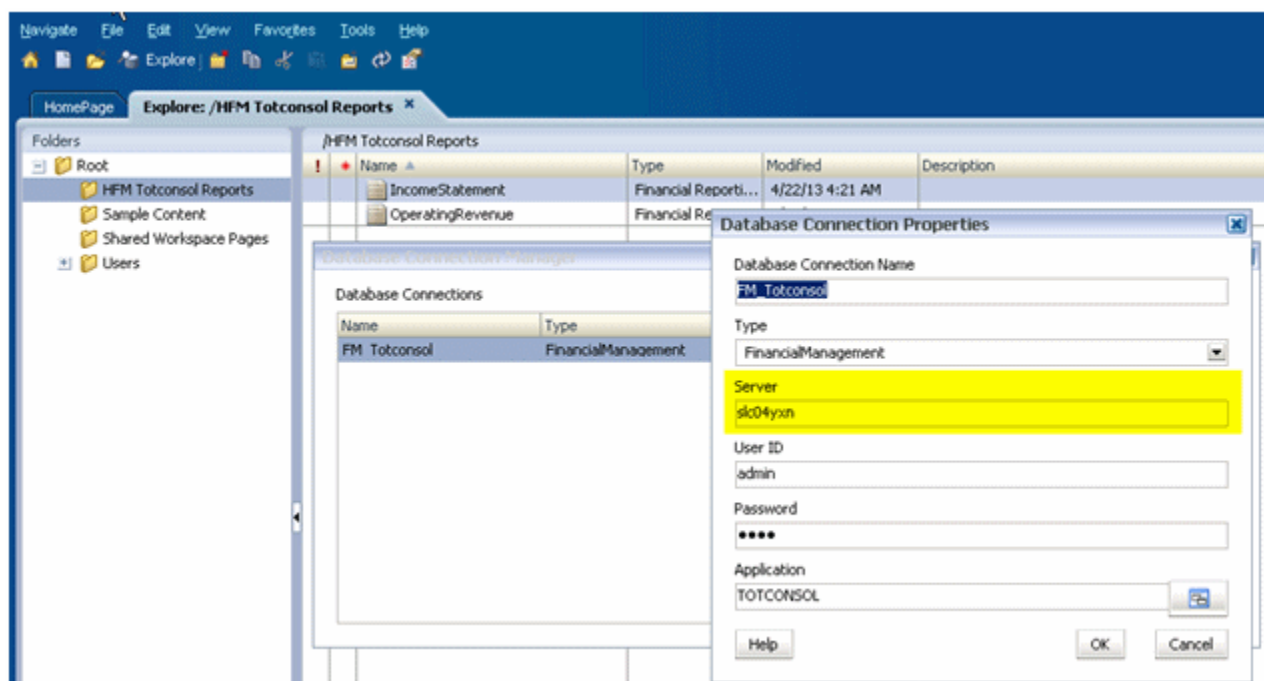
You can open the application and explore the metadata.



- 2 Open the Oracle Hyperion Financial Reporting report and check to see if the data is being populated.
  - a. In EPM Workspace, click **Explore**.
  - b. In the **HFM Totconsol Reports** folder, open the **Income Statement** report.



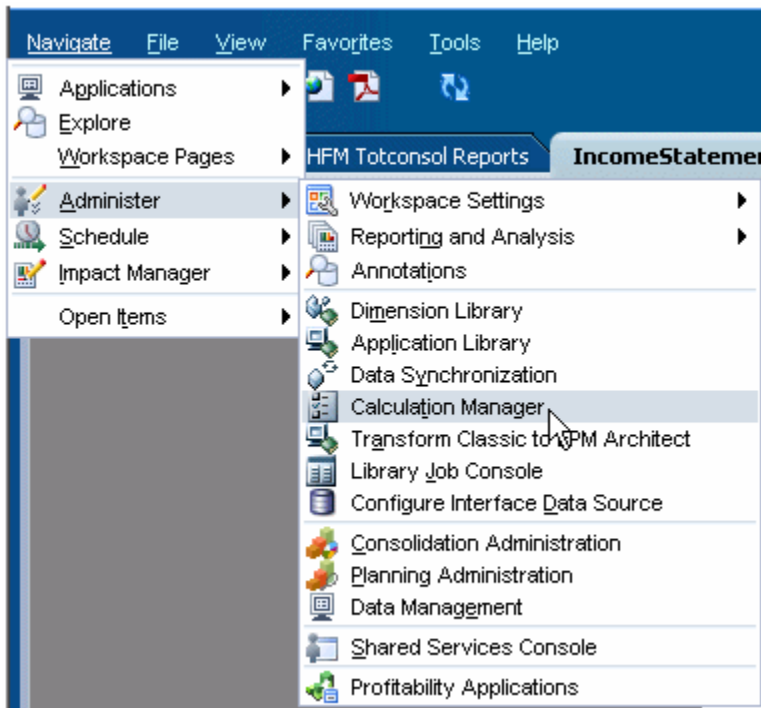
- c. On error, click **OK**.
- d. Select **Tools**, then **Database Connection Manager**, and then edit the **FM Totconsol** connection.



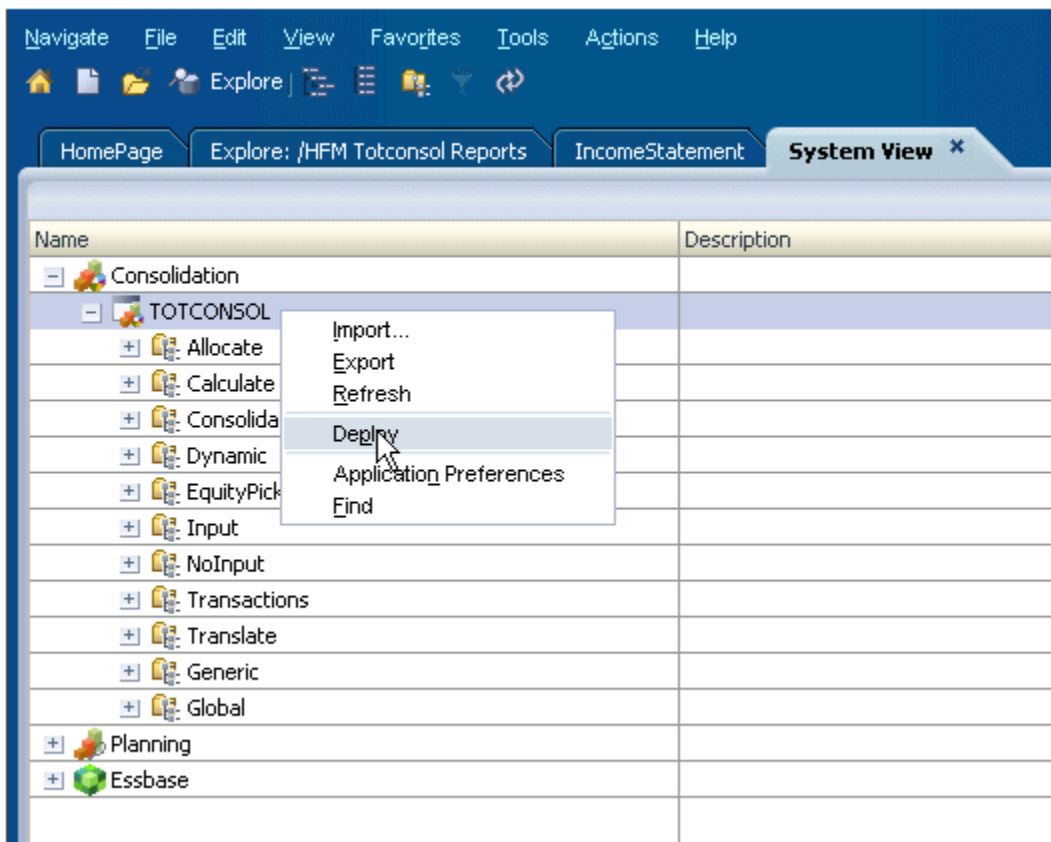
- e. Change the Server\Cluster name to point to the one in your environment.
- f. Save your changes and open the report again.

	Jan	Feb	Mar
Operating Revenue	2,594,772	4,416,180	5,560,906
Sales Returns	-149,743	-254,856	-320,918
Sales Discounts	-105,288	-179,196	-225,645
Operating COS	3,942,167	6,530,181	7,900,743
Travel Expense	71,905	115,289	138,123
Meals Expense	8,573	13,640	16,683
Office Supplies Expense	4,315	6,941	8,239
Apama	3,961	6,332	7,651
Postage and Freight	7,447	12,011	14,155
Telephone Expense	4,456	7,167	8,508
Cellular Charges	3,250	5,231	6,205
Internet	11,584	18,534	22,348
Equipment Lease and Rental	15,615	25,245	29,562
Individual Contractors	3,855	6,141	7,495
Consulting Firms	8,425	13,496	16,210
Other Misc. Expense	313	502	602
Bonus Expense	44,769	72,478	84,506
Temporary Help	3,732	6,041	7,044
Base Salary	202,161	326,837	382,600
Payroll Taxes	8,393	13,588	15,842
Relocation	2,578	4,120	4,981
Employee Development	9,399	15,071	18,054

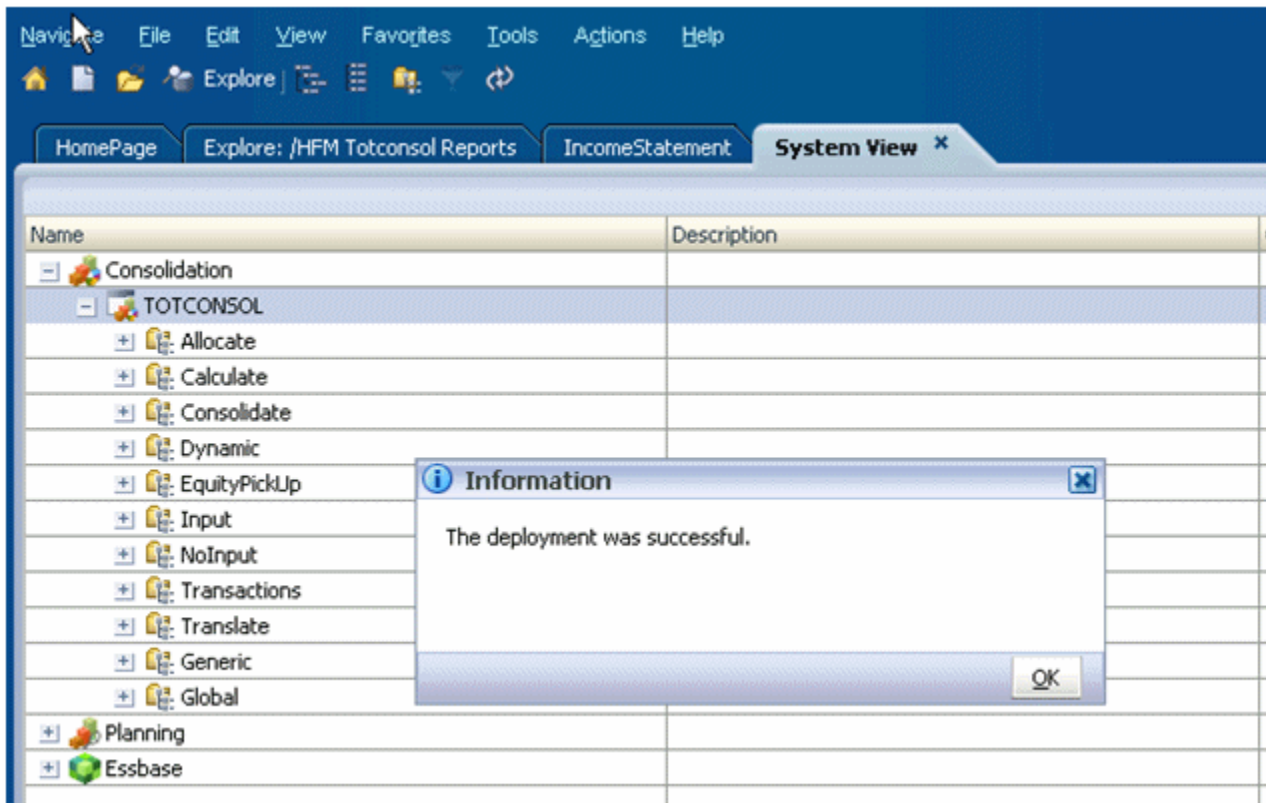
3 In EPM Workspace, select **Navigate**, then **Administer**, and then **Calculation Manager**.



4 Select **Deploy** to re-deploy the rules.

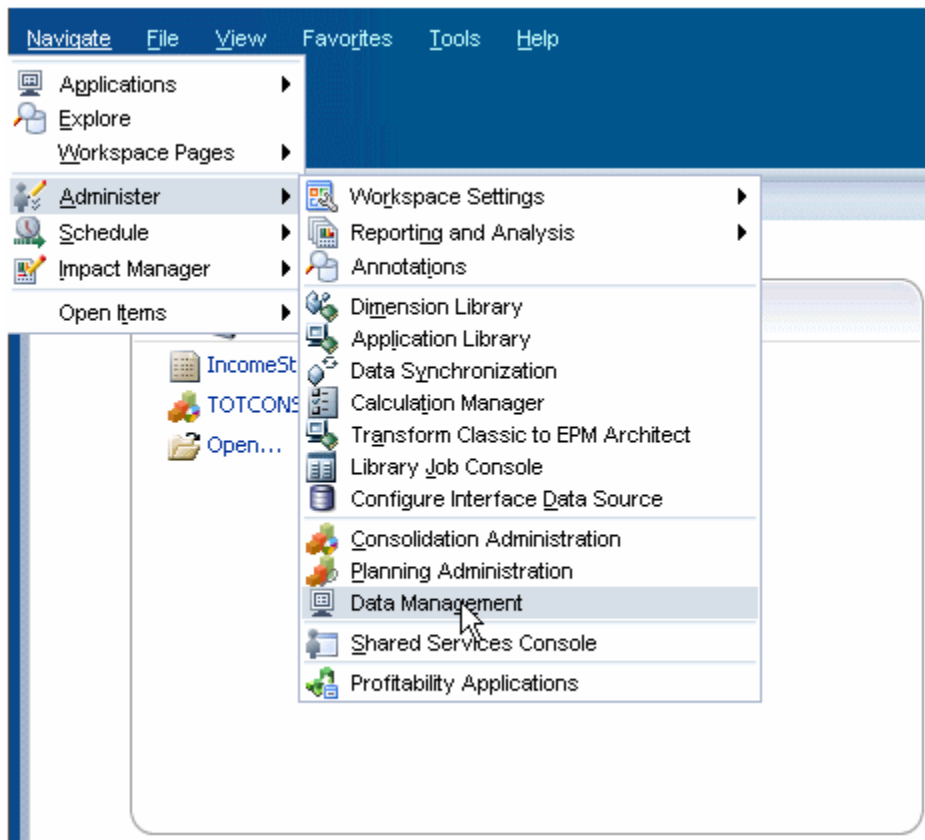


If the deployments is successful, a dialog box is displayed.

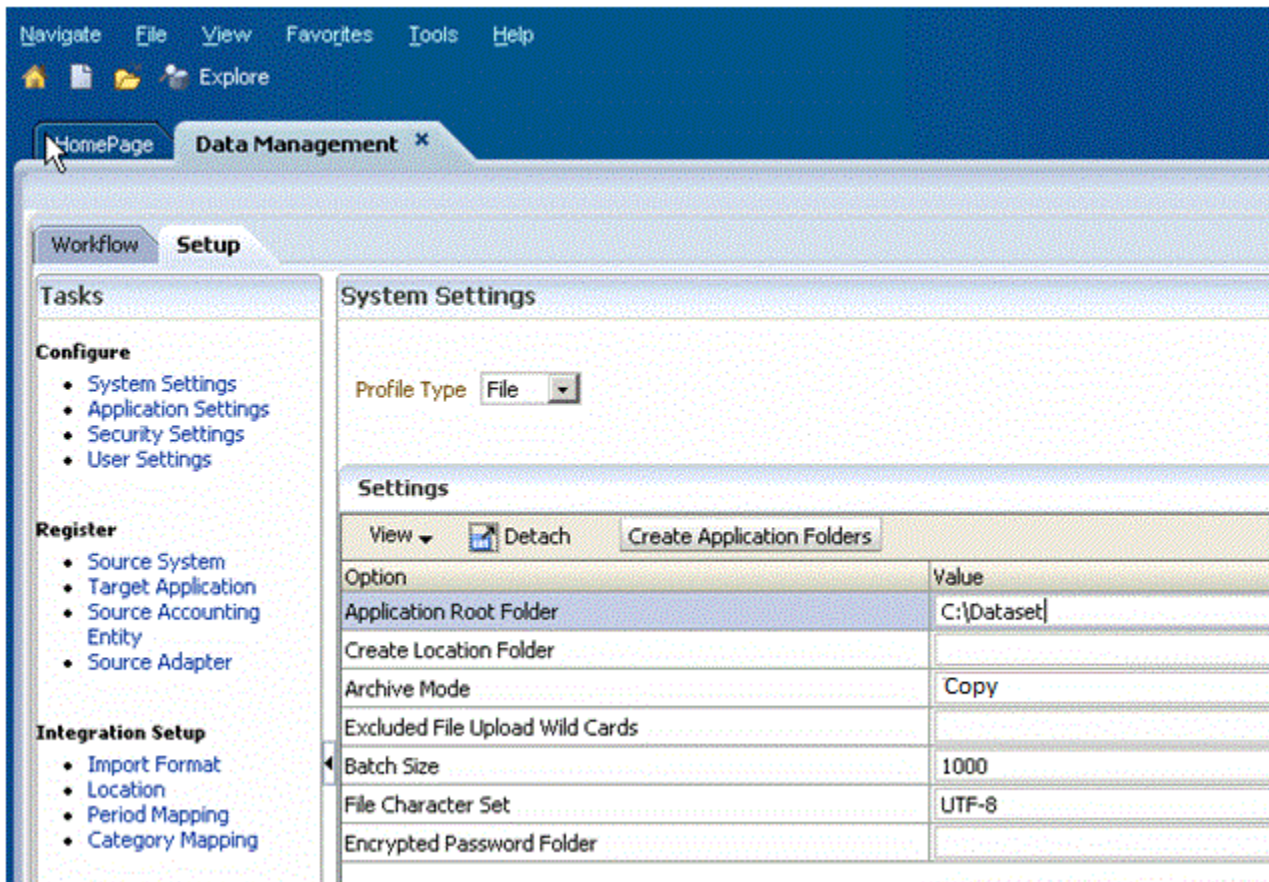




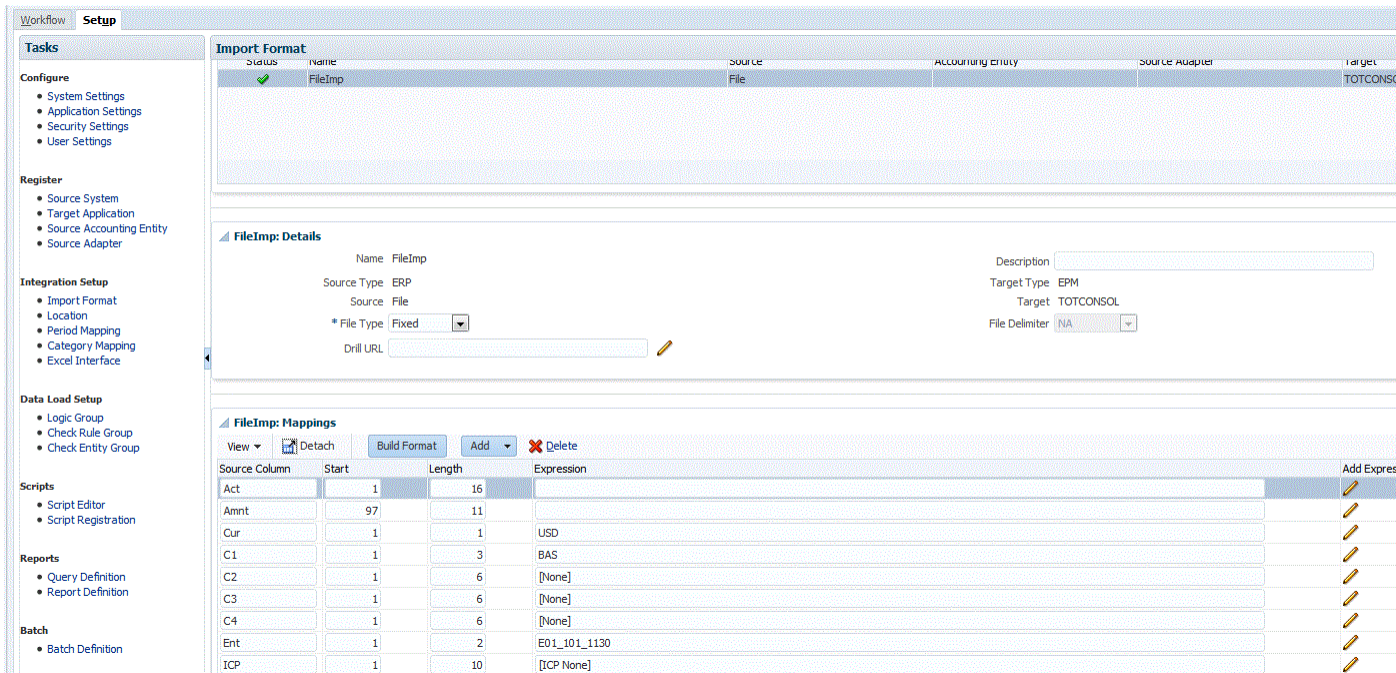
- 5 Navigate to Oracle Hyperion Financial Data Quality Management, Enterprise Edition and verify that the migrated mappings and rules work for the file C:\HFMDataset\Texas\_GL1glo.



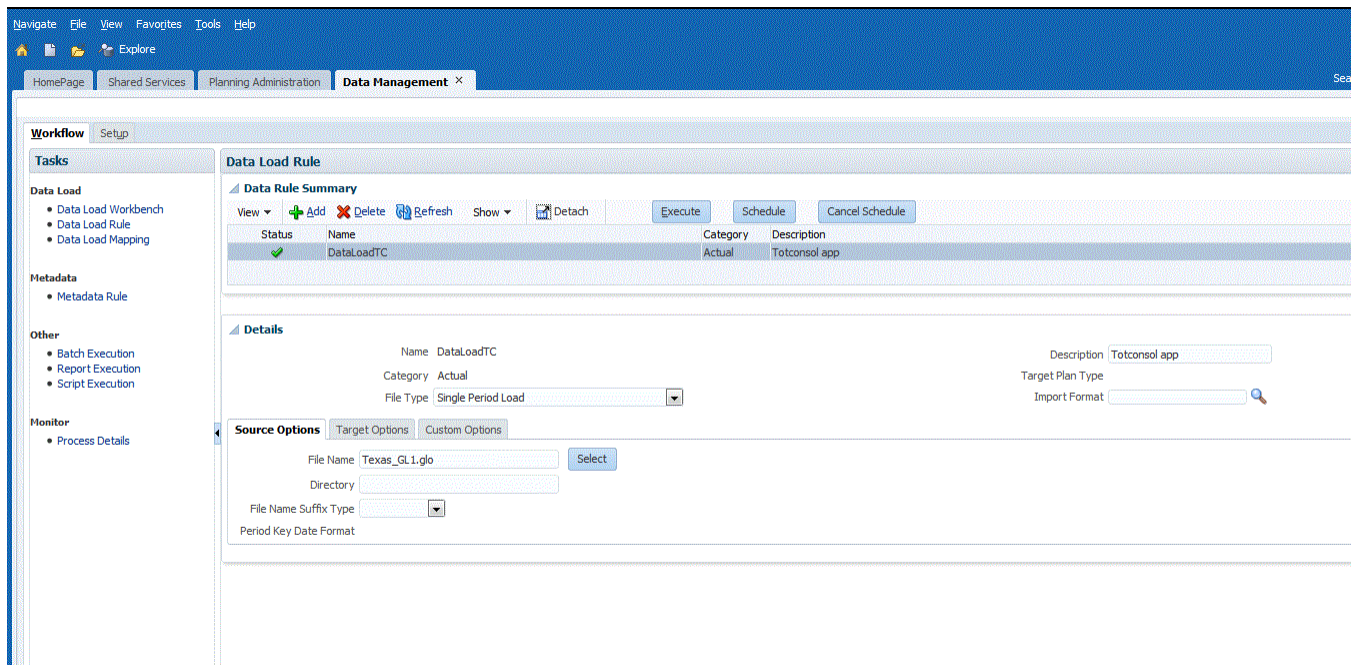
- a. Create the application folders in the target environment.



b. Verify the mappings.

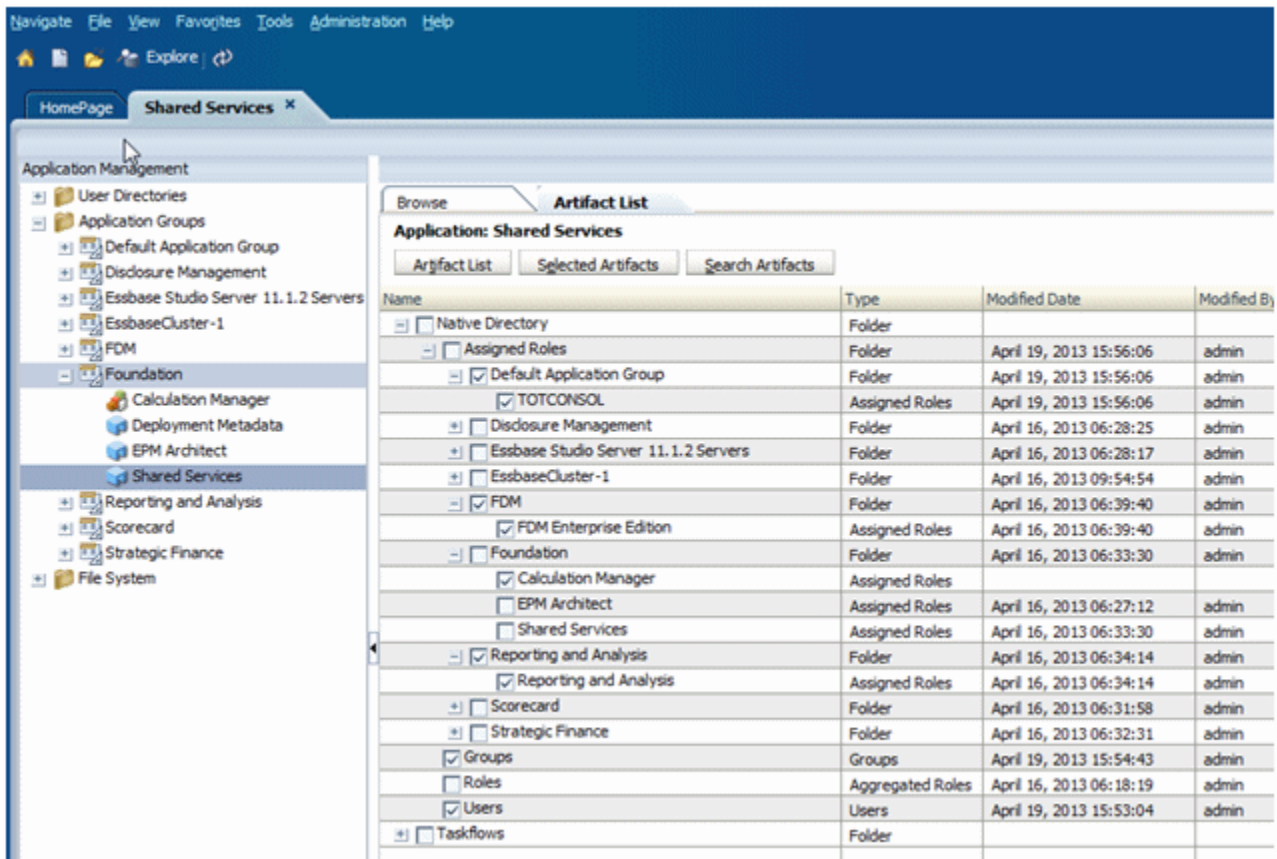


c. Execute the data load.

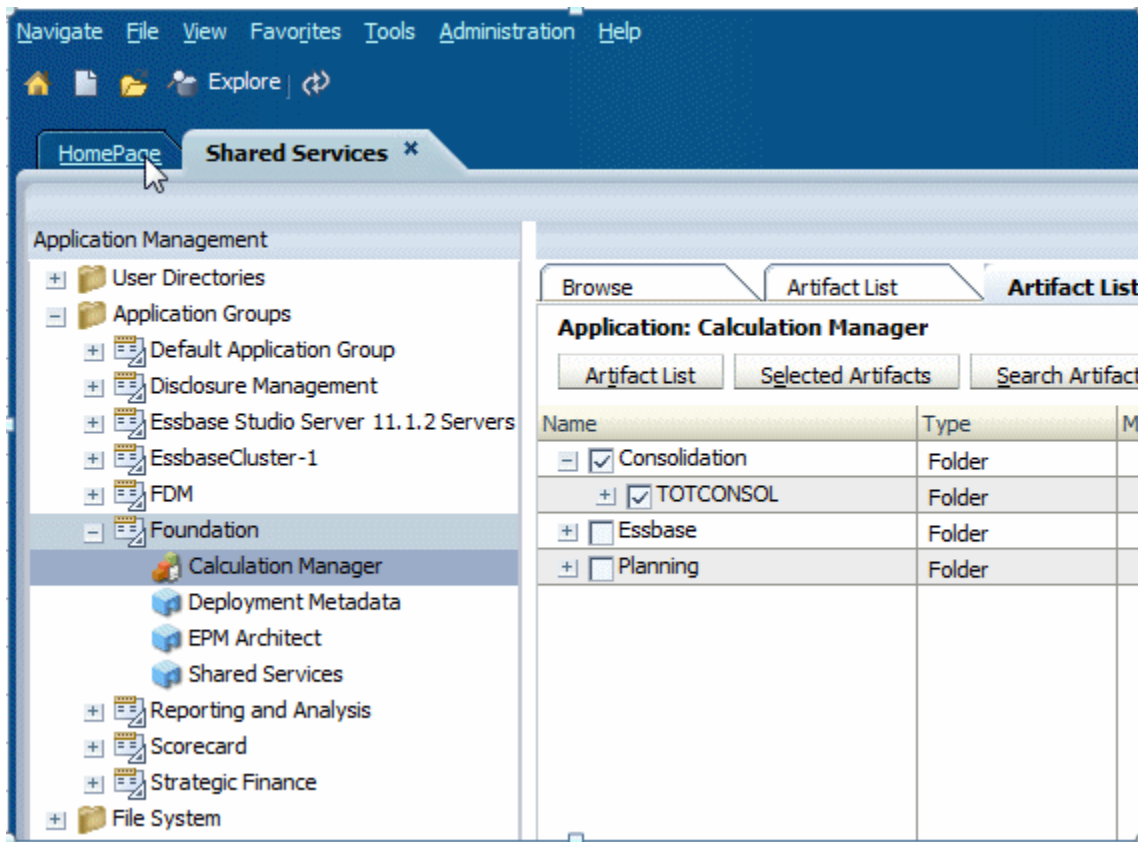


## Exercise 3: Exporting Financial Management Suite Artifacts and Data

- To export Financial Management Suite artifacts and data:
  - 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 select **Navigate**, then **Administer**, and then **Shared Services Console**.
  - 2 Expand **Application Groups**, then **Foundation**, and then **Shared Services**.
  - 3 In the right pane, expand **Native Directory**, and then **Assigned Roles**, and then select the artifacts as shown below.

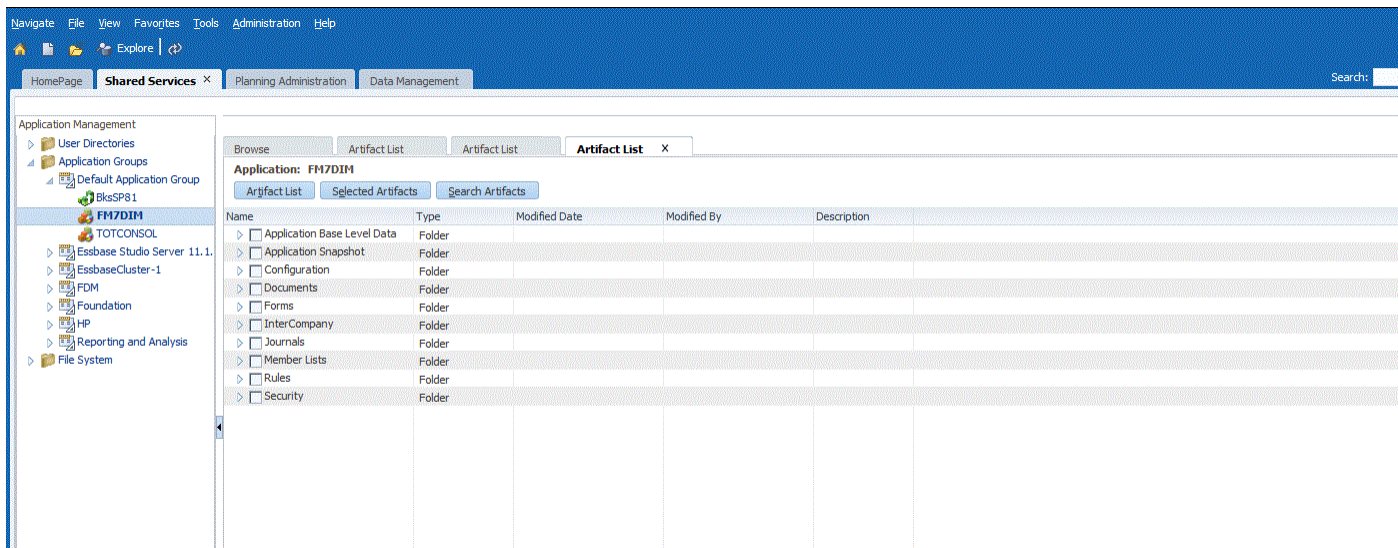


- 4 In the left pane under **Application Groups**, expand **Foundation**, and then **Calculation Manager**.
- 5 In the right pane, expand **Consolidation** and select the **TOTCONSOL** application.

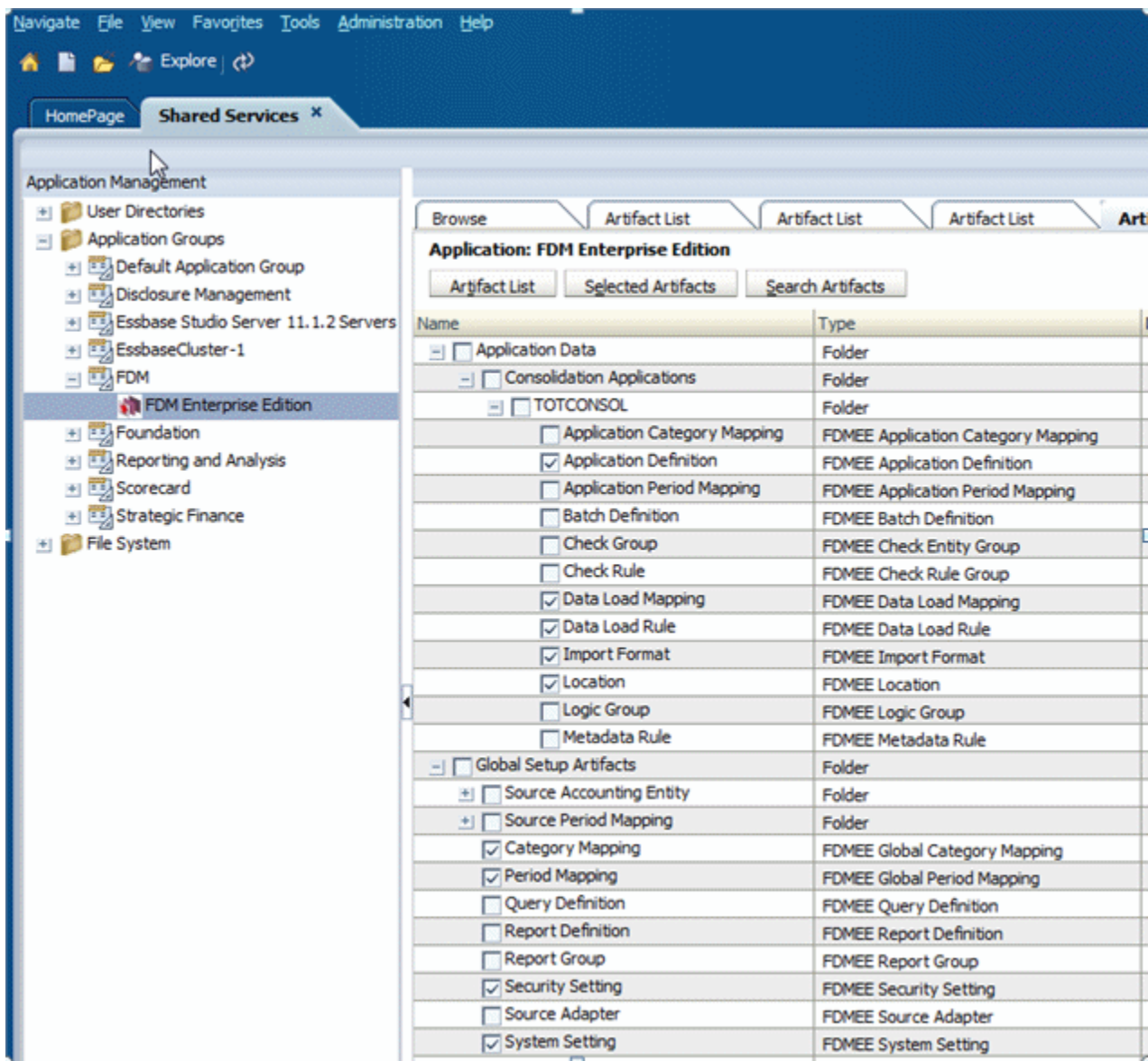


- 6 In the left pane under **Application Groups**, expand **Default Application Group**, and then select **TOTCONSOL**.

You should be able to see all the artifacts of the TOTCONSOL application in the right pane. Select all the artifacts except the Application Snapshot folder.



- 7 In the left pane under **Application Groups**, expand the **FDM** application group, then select **FDM Enterprise Edition**, and then select the artifacts as shown below.

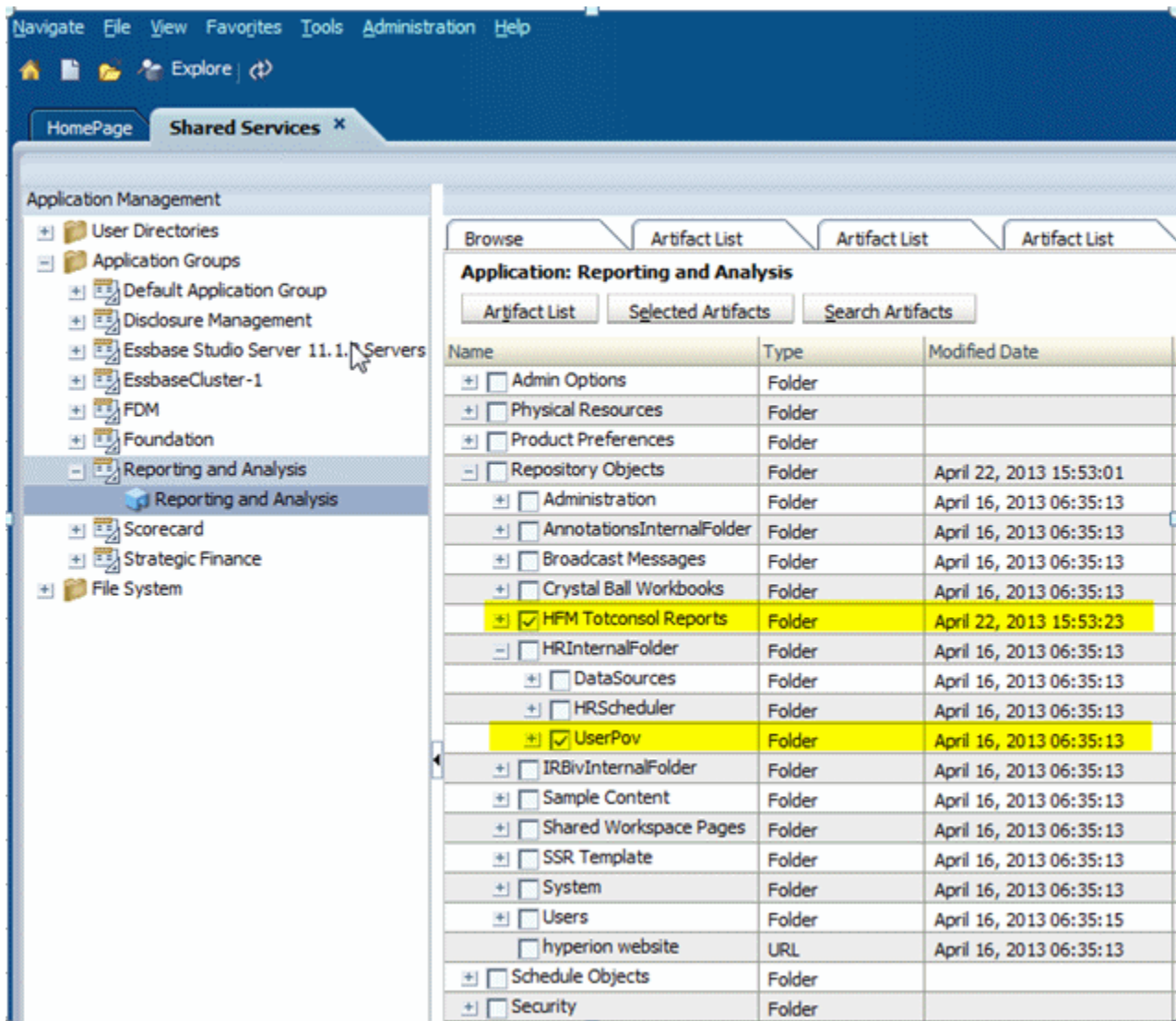


8 In the left pane under **Application Groups**, expand the **Reporting and Analysis** application group, and then select **Reporting and Analysis**.

You should now see all the Oracle Hyperion Reporting and Analysis artifacts in the right pane.

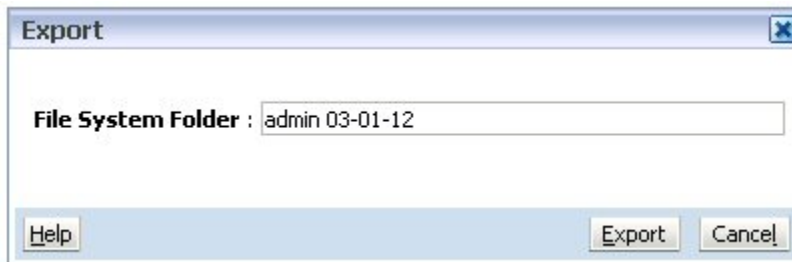
9 In the right pane, expand **Repository Objects** and do the following::

- Select **HFM Totconsol Reports**
- Expand **HRInternalFolder** and select **UserPOV**.

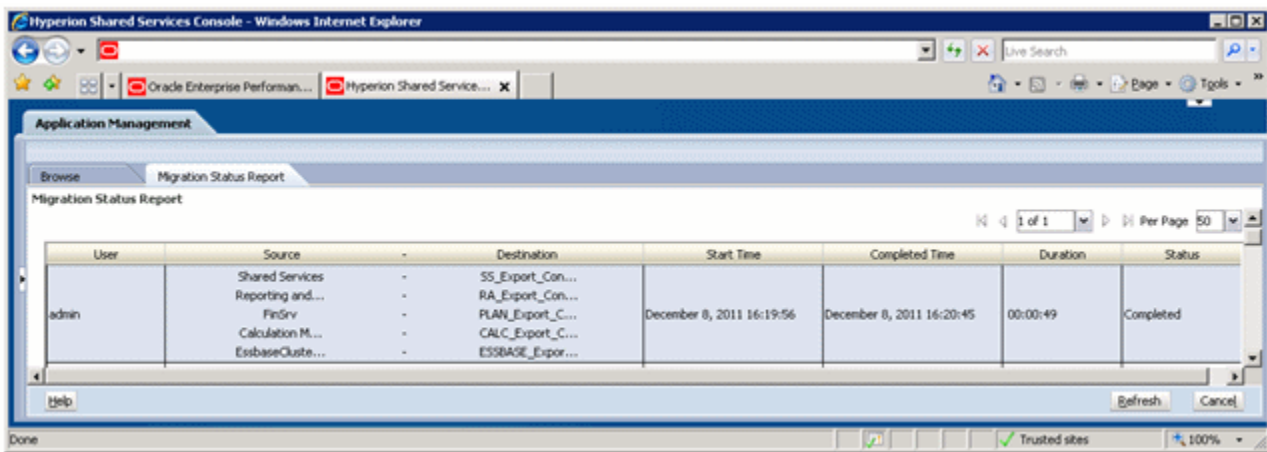


10 Click **Export**.

11 In the Export dialog box, enter the **File System Folder** name and click **Export**.



This launches the Migration Status Report.



**12 Wait for the migration to complete.**

The exported content is available at *EPM\_ORACLE\_INSTANCE/import\_export*.

The exported content can also be download from Oracle Hyperion Shared Services Console by right-clicking the exported File System folder and selecting **Download**.





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EPM System Migrating Oracle Hyperion Financial Management Applications, 11.1.2.4

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