

## ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.4

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CONTENTS IN BRIEF

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About This Document	. 2
Setting Up the Environment	. 2
Exercise 1: Importing Financial Management Suite Artifacts and Data	. 3
Exercise 2: Validating the Import	. 5
Exercise 3: Exporting Financial Management Suite Artifacts and Data	11

# **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.

## **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 <code>epm\_migrate\_hfm\_app\_data.zip</code>.

- 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.

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

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Do you want to proceed with impor	t?
Help	OK Cancel

#### 4 Wait for the import operation to complete.

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**Note:** You might encounter a failure with just one error as shown below. You can ignore this and verify the import as shown in Exercise 2: Validating the Import.

ſ	Browse Migration Status Report Migration Details	
	Migration Details Migration run by admin on May 2, 2013 01:33:04	I d 1 of 1 ► D Per Page
	Source: HFM-TOTCONSOL (File System) Destination: TOTCONSOL (Application)	
	EPMLCM-14000: Error reported from HFM.	
	/Application Base Level Data/Data:2147195573 :	

# **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.

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	190000 - Long Term Assets									
	100000 - Total Assets									
	211100 - Accounts Payable									

- 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.

#### ORACLE' Enterprise Performance Management System Workspace, Fusion Edition

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

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

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	Maria Expense	0.673	12,640	130,123		
	Office Supplies Expense	6.573	13,540	16,003		
	Apana	4,315	6,941	8,239		
	Postage and Freight	3,961	6,332	7,651		
	Telephone Expense	7,447	12,011	14,155		
	Celular Charges	4,456	7,167	8,508		
	Internet	3,250	5,231	6,205		
	Equipment Lease and Ren	kal 11,584	18,534	22,348		
	Equipment Repair and Mai	nt 15,615	25,245	29,962		
	Individual Contractors	3,055	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.

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	Library Job Console
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	🝓 Profitability Applications

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

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

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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.

🖹 📂 🛧 Explore	agement ×	
Workflow Setup		
Tasks	System Settings	
Configure <ul> <li>System Settings</li> <li>Application Settings</li> <li>Security Settings</li> <li>User Settings</li> </ul>	Profile Type File  Settings	
Register	View 🗸 🛃 Detach 🛛 Create Application Folder	as
Source System     Target Application	Option	Value
<ul> <li>Source Accounting</li> </ul>	Application Root Folder	C:\Dataset
Entity     Source Adapter	Create Location Folder	
	Archive Mode	Сору
integration Setup	Excluded File Upload Wild Cards	
Import Format	Batch Size	1000
Location     Period Mapping	File Character Set	UTF-8
Period Mapping     Category Mapping		

## b. Verify the mappings.

worknow secup									
Tasks	Import Format	E							
Configure • System Settings • Application Settings • Security Settings • User Settings	Status	FileImp				File	Accounting entity	Source Adapter	TOTCONS
Register • Source System • Target Application • Source Accounting Entity • Source Adapter	✓ FileImp: Deta	ails	me FileImp				Description		
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Data Load Setup • Logic Group • Check Rule Group • Check Entity Group	✓ FileImp: Map View ▾ 🚮 🛙	opings Detach	Build Format	Add 🗸	X Delete				
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c. Execute the data load.

HomePage Shared Services	Planning Administration Data Management ×	
Workflow Setup		
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<ul> <li>Data Load Rule</li> <li>Data Load Mapping</li> </ul>	Status Name Category D DataLoadTC Actual T	Description Totconsol app
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Other	⊿ Details	
Batch Execution     Report Execution     Script Execution	Name DataLoadTC Category Actual File Type Single Period Load	Description Totconsol app Target Plan Type Import Format
4onitor • Process Details	Source Options Target Options Custom Options     File Name Texas_GL1.glo     Directory     File Name Suffix Type     Preiod Key Date Format	

## **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), 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.

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HomePage Shared Services *				
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Application Management				
User Directories	Browse Artifact List			
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🖭 📆 Default Application Group		1		
🖭 📆 Disclosure Management	Argract List Sejected Artifacts Search Artifacts			
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EssbaseCluster-1	Native Directory	Folder		
🖭 🎫 FDM	Assigned Roles	Folder	April 19, 2013 15:56:06	admin
- European - Eventation	Default Application Group	Folder	April 19, 2013 15:56:06	admin
🎻 Calculation Manager	TOTCONSOL	Assigned Roles	April 19, 2013 15:56:06	admin
🧊 Deployment Metadata	Disdosure Management	Folder	April 16, 2013 06:28:25	admin
g EPM Architect	<ul> <li>Essbase Studio Server 11.1.2 Servers</li> </ul>	Folder	April 16, 2013 06:28:17	admin
gl Shared Services		Folder	April 16, 2013 09:54:54	admin
E Reporting and Analysis	E FDM	Folder	April 16, 2013 06:39:40	admin
🖭 🌉 Scorecard	FDM Enterprise Edition	Assigned Roles	April 16, 2013 06:39:40	admin
Strategic Finance	E Foundation	Folder	April 16, 2013 06:33:30	admin
🖭 🌮 File System	Calculation Manager	Assigned Roles		
	EPM Architect	Assigned Roles	April 16, 2013 06:27:12	admin
	Shared Services	Assigned Roles	April 16, 2013 06:33:30	admin
	Reporting and Analysis	Folder	April 16, 2013 06:34:14	admin
	Reporting and Analysis	Assigned Roles	April 16, 2013 06:34:14	admin
	Scorecard     Scorecar	Folder	April 16, 2013 06:31:58	admin
	Strategic Finance	Folder	April 16, 2013 06:32:31	admin
	Groups	Groups	April 19, 2013 15:54:43	admin
	Roles	Aggregated Roles	April 16, 2013 06:18:19	admin
	Users Users	Users	April 19, 2013 15:53:04	admin
	Taskflows	Folder		

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.

<u>N</u> avigate <u>F</u> ile <u>V</u> iew Favo <u>r</u> ites <u>T</u> ools <u>A</u> dministr	ration <u>H</u> elp				
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HomePage Shared Services *					
45					
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🖭 问 User Directories	Browse Artifact List	Artifact List			
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Essbase Studio Server 11.1.2 Servers	Name	Type M			
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Deployment Metadata					
EPM Architect					
Shared Services					
Reporting and Analysis					
E Scorecard					
🛨 🧾 Strategic Finance					
🛨 🃁 File System					

# 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.

Application Management	HomePage Shared Services *	Planning Administration Data Mi	anagement S
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∫ TOTCONSOL             ∫ Application Snapshot             Folder                  ∑ Sabbase Studie Server 11.1.             ∫ Application Snapshot                  ∑ FOM                  ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                 ∑ FOM                ∑ Reporting and Analysis                ∑ File System <td>FM7DIM</td> <td>Name</td> <td>Type Modified Date Modified By Description</td>	FM7DIM	Name	Type Modified Date Modified By Description
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> □ Documents     Folder       > □ Security     Folder	EssbaseCluster-1	Configuration	Folder
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>Security Folder		Rules	Folder
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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.

HomePage Shared Services *   Application Management   Image: Directories   Image:	
HomePage       Shared Services       ×         Application Management       Image: Second Sec	
HomePage       Shared Services ×         Application Management       Image: Service Servic	
Application Management         Image: Consolidation Management         Image: Consolidation Group         Image: Consolidation Application Category Mapping         Image: Consolidation Application Category Mapping         Image: Consolidation Application Period Mapping         Image: Consolidation Application Period Mapping         Image: Consolidation Application Period Mapping         Image: Consolidation Period Mapping         Image: Coneck Rule         Image: Coneck Rule <th></th>	
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Default Application Group Disclosure Management Essbase Studio Server 11.1.2 Servers EssbaseCluster-1 FOM FOM FOM FOM Enterprise Edition Foundation Foundation Foundation Scorecard Strategic Finance File System File System File System Artifact List Selected Artifacts Search Artifacts Name Type Poly TOTCONSOL Folder TOTCONSOL Folder Poly Foundation Application Category Mapping FDMEE Application Category Mapping FDMEE Application Category Mapping FDMEE Application Period Mapping FDMEE Application Period Mapping FDMEE Check Entity Group Check Rule FDMEE Check Rule Group FDMEE Data Load Mapping FDMEE Data Load Mapping FDMEE Data Load Mapping FDMEE Import Format FDMEE Inport Format FDMEE Logic Group FDMEE Logic Group	
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<ul> <li>EssbaseCluster-1</li> <li>FDM</li> <li>FDM Enterprise Edition</li> <li>Foundation</li> <li>Foundation</li> <li>Reporting and Analysis</li> <li>Scorecard</li> <li>Strategic Finance</li> <li>File System</li> <li>File System</li> <li>Folker</li> <li>Check Rule</li> <li>Check Rule</li> <li>FDMEE Application Period Mapping</li> <li>FDMEE Check Entity Group</li> <li>Check Rule</li> <li>FDMEE Data Load Mapping</li> <li>FDMEE Data Load Rule</li> <li>Timport Format</li> <li>FDMEE Import Format</li> <li>Logic Group</li> <li>FDMEE Logic Group</li> </ul>	
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Image: PDM Enterprise Edition       Image: Construction of the point	
<ul> <li>Foundation</li> <li>Reporting and Analysis</li> <li>Scorecard</li> <li>Strategic Finance</li> <li>File System</li> <li>File System</li> <li>Check Rule</li> <li>Check Rule</li> <li>FDMEE Application Period Mapping</li> <li>FDMEE Check Entity Group</li> <li>Check Rule</li> <li>FDMEE Check Rule Group</li> <li>Check Rule</li> <li>FDMEE Data Load Mapping</li> <li>FDMEE Data Load Rule</li> <li>Timport Format</li> <li>Location</li> <li>FDMEE Location</li> <li>Logic Group</li> </ul>	
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Logic Group FDMEE Logic Group	
Metadata Rule FDMEE Metadata Rule	
- Global Setup Artifacts Folder	
Source Accounting Entity     Folder	
Source Period Mapping     Folder	
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Period Mapping FDMEE Global Period Mappi	g
Query Definition FDMEE Query Definition	
Report Definition FDMEE Report Definition	
Report Group FDMEE Report Group	
Security Setting FDMEE Security Setting	
Source Adapter FDMEE Source Adapter	
System Setting FDMEE System Setting	

# 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**.

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H E FDM	+ Physical Resources	Folder			
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- 🗒 Reporting and Analysis	- Repository Objects	Folder	April 22, 2013 15:53:01		
Reporting and Analysis	Administration	Folder	April 16, 2013 06:35:13		
🗉 📆 Scorecard	+ AnnotationsInternalFolder	Folder	April 16, 2013 06:35:13		
🛨 📆 Strategic Finance	Broadcast Messages	Folder	April 16, 2013 06:35:13		
📁 File System	± Crystal Ball Workbooks	Folder	April 16, 2013 06:35:13		
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	+ System	Folder	April 16, 2013 06:35:13		
	🖭 🔝 Users	Folder	April 16, 2013 06:35:15		
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## **10** Click **Export**.

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

Export		×
File System Folder :	admin 03-01-12	
Help		Export Cance

This launches the Migration Status Report.

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### **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**.

#### COPYRIGHT NOTICE

EPM System Migrating Oracle Hyperion Financial Management Applications, 11.1.2.4

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Authors: EPM Information Development Team

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