

ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.4

Т

Migrating Oracle Hyperion Profitability and Cost Management Applications	ORACLE
---	--------

CONTENTS IN BRIEF

_

About This Document	. 2
Setting Up the Environment	. 2
Exercise 1: Importing a Profitability and Cost Management Application	. 4
Exercise 2: Exporting a Profitability and Cost Management Application	10

About This Document

This document is a tutorial on how to migrate an Oracle Hyperion Profitability and Cost Management application from one environment to another. The steps include artifacts and data of Profitability and Cost Management and related components including Oracle Essbase and Oracle Hyperion Shared Services artifacts.

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

• Exercise 1: Importing a Profitability and Cost Management Application

This exercise provides steps to import a Profitability and Cost Management application. – 30 Minutes

• Exercise 2: Exporting a Profitability and Cost Management Application

This exercise provides steps to export a Profitability and Cost Management application. – 30 Minutes

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

Note: The application names shown in the screen shots in this document do not match the application names in the sample data; however, the steps remain the same.

Setting Up the Environment

Subtopics

- Building an Environment
- Downloading Sample Data

Building an Environment

Before you start these exercises in this document, you will need a Release 11.1.2.3 environment configured with the following products:

- Oracle Hyperion Foundation Services
- Oracle Hyperion EPM Architect
- Profitability and Cost Management
- Essbase

Downloading Sample Data

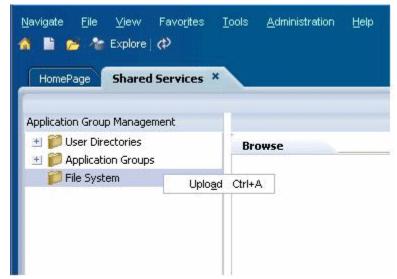
Note: You must use the 7-Zip software to unzip the sample data used in these exercises. Please download it before proceeding. Using other archiving utilities might result in migration errors.

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 11.1.2.3, click View Library.
- 3. On the Foundation Services tab, select the file titled Migrating Oracle Hyperion Profitability and Cost Management 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_hpcm_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 HPCMAppSuite1.zip, and then select Upload.
- 7. Repeat Step 5, then browse to **HPCMAppSuite2.zip**, and then select **Upload**.

Exercise 1: Importing a Profitability and Cost Management Application

Subtopics

- Step 1: Import Profitability and Cost ManagementPerformance Management Architect Metadata and Shared Services Artifacts
- Step 2: Import Profitability and Cost Management Application Artifacts and Essbase Cubes

Step 1: Import Profitability and Cost ManagementPerformance Management Architect Metadata and Shared Services Artifacts

- To import Profitability and Cost ManagementPerformance Management Architect metadata and Shared Services artifacts:
- 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 HPCMAppSuite1, and select Import.

Note that the HPCMAppSuite1 folder has related artifacts from Oracle Hyperion Shared Services and Performance Management Architect. The data set is divided into two parts because the Oracle Hyperion EPM Architect application has to be deployed before you can import other application artifacts.



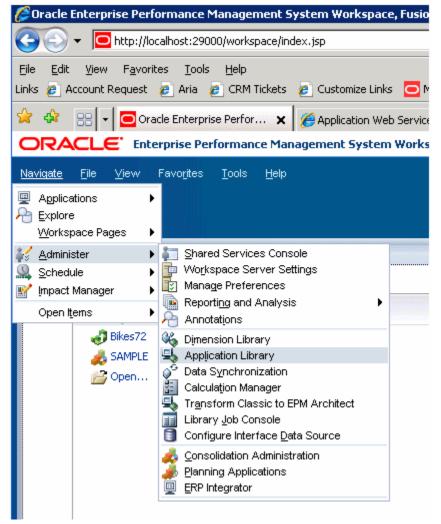
3 Select **OK** when asked if you want to proceed with the import.

Import to Application	
Do you want to proceed with imp	ort?
Help	<u>OK</u> <u>Cancel</u>

4 Wait for the import operation to complete.

admin	HPCMAppSuite1 EPM Architect January 10, 2012	January 10, 2012	00-00-15	Concluted			
admin	HPCMAppSuite1	1	Shared Services	07:42:10	07:42:25	00:00:15	Completed

5 Log in to EPM Workspace and navigate to the Profitability and Cost Management application library by selecting **Navigate**, then **Administer**, and then **Application Library**.



6 Deploy the Profitability and Cost Management application and wait for it to complete.

<u>N</u> avigate <u>F</u> ile <u>V</u> ie 🐴 🖹 📂 🎥 Exp	w Favo <u>r</u> ites <u>T</u> ook Nore j 🏟 🤌 🤌	s <u>A</u> dministration	Help
HomePage App	olication Library ×		
1			
Application Library			
-			
Bikes72			
	Edit		
-	D <u>u</u> plicate Delete	•	
	<u>O</u> pen		
	<u>∨</u> alidate		
	Deploy		
Summary Name : Bikes72 Turce : Drofftobility	Rere <u>g</u> ister Data <u>F</u> low		
Type : Profitability Created : Tuesdav	Synchronize		
Last Deployed : T	<u>C</u> ompare	▶ 28 AM	
Status : In sync w	Djagnostics		
_	Deployment History		
	Refres <u>h</u>		

Navigate File View Favorites Tools Administration Help
HomePage Application Library ×
Application Library
Bikes72
Summary
Name : Bikes72 Type : Profitability
Created : Thursday, January 19, 2012 2:24:04 AM Last Deployed : Thursday, January 19, 2012 4:31:32 AM
Status : In sync with deployment

Step 2: Import Profitability and Cost Management Application Artifacts and Essbase Cubes

- > To import Profitability and Cost Management application artifacts and Essbase cubes:
- 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 HPCMAppSuite2, and select Import.

Note that the HPCMAppSuite2 folder has related artifacts (including data) from Profitability and Cost Management and Essbase. These artifacts can now be imported because the application has been deployed.

RACLE Hyperion S	hared Services Co	nsole	
e <u>V</u> iew <u>A</u> dministration <u>H</u> Application Management	elp		
oplication Group Management			
 Directories P Application Groups P File System P HPCMAppSuite1 	Browse		
🖃 📆 HPCMAppSuite2	Delete	Ctrl+D	
	Import	Ctrl+R	
ESB-Bikes72C		Ctrl+X	

3 Wait for the import to complete.

admin	HPCMAppSuite2 HPCMAppSuite2 HPCMAppSuite2	1	Bikes72C Bikes72R Bikes72	January 10, 2012 07:44:17	January 10, 2012 07:45:13	00:00:56	Completed	
-------	---	---	---------------------------------	------------------------------	------------------------------	----------	-----------	--

4 Log in to EPM Workspace and navigate to the Profitability and Cost Management application you just imported by selecting **Navigate**, then **Applications**, then **Profitability**, and then *<a price application name>*.

	terprise Performance Manag	ement System Work:
<u>Naviqate</u> <u>F</u> ile <u>V</u> iew	Favo <u>r</u> ites <u>T</u> ools <u>M</u> odel	<u>A</u> llocations <u>V</u> alidate
Applications	Eerformance Scorecard	
Per Explore	🦽 Consolidation	•
Workspace Pages	🕨 🧀 Planning	•
👬 Administer	🖌 🌏 Profitability	🕨 🎻 Bikes72
Schedule	▶ Refres <u>h</u>	

In this example, the *<application name>* is Bikes72.

5 In the Oracle Hyperion Profitability and Cost Management application, expand **Calculate**, select **Manage Database**, and redeploy both the Calculation and Reporting cubes to sync them up.

HomePage Application Library	Biles72 × Search	
Task Areas	Nanaga Database	
1 III Manage Model III III Manage Allocations IIII III Valdate	Select the tab for the type of database that you want to deploy. Review the Essbase Information, and select the Deploy Options. Click Deploy Now to deploy the model immediately, schedule a more convenient time.	er click
🖃 🂕 Calculate	Calculation Database Reporting Database	
A Manage Database Anage Calculation If points Ratus	Esdase Information Ouster1 Essbase-Cluster-1	
	Calculation Application: [biles/720] Calculation Database: [biles/720]	
	Distabase Options Image: Control optimized in the control opting in the con	
	Last reporting bistoper Depoyment: January 10, 2012 5129132 MR1491 by admin	r Nove

6 Log in to Oracle Essbase Administration Services Console and verify that both Oracle Essbase cubes were deployed successfully.

Oracle® Essbase Administration Services 11.1.2 - admin connected on localhost:8080 ORACLE Essbase Administration Services File View Organize Actions Tools Help 📔 🝰 🔚 🏐 🖃 📕 Enterprise View Administration Servers 🗄 🗊 localhost:8080 Connected 🖨 🗿 Essbase Servers 🖮 🗿 EssbaseCluster-1 - Applications 🗄 📃 ASOsamp 🕀 🗐 Bikes72C 🗄 🔳 Bikes72R 🗄 📃 Demo 🗄 📃 Sampeast 🗄 📃 Sample 🗄 📃 Sample_U 🗄 📃 Samppart 🗄 📓 Security Provider Servers ÷...

Exercise 2: Exporting a Profitability and Cost Management Application

- > To export a Profitability and Cost Management application:
- 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 Do one of the following:
 - Select the artifacts individually from multiple applications and export them into a single folder.

To do this:

a. Select the artifacts in the following screen capture and export them to a folder.

Application Management						
Application Management						
🖭 💕 User Directories	Browse Migration Stat	us Report Artifact Lit	R Atlact	ist Artifact List	Artifact List	
Papelication Groups	Application: EPM Architect					
 Business Rules 	Antonio Colordante	c Carrob Addante				
🗉 🌉 Data Relationship Manageme						
Default Application Group	Name	Size (K Type	Modified Date	Moc Desc Application Group	App Name	Path
🗉 🎇 Disclosure Management	☑ 8ksSP01C	Assigned Roles	May 9, 2012	Foundation	Shared Services	/Native Directory/Assigned Roles/EssbaseCluster-1
Essbase Studo Server 11.1.	EksSP81R	Assigned Roles	May 9, 2012	Foundation	Shared Services	/Native Directory/Assigned Roles/EssbaseCluster-1
EssbaseCluster-1	EksSP81	Assigned Roles	May 9, 2012	Foundation	Shared Services	(Native Directory(Assigned Roles/Profitability)
E ESPEM	Users	Users	May 9, 2012	Foundation	Shared Services	(Native Directory)
🗉 🏭 Financial Close	Groups	Groups	March 26, 2012	Foundation	Shared Services	(Native Directory)
E E PM	C BksSP81	Folder		Foundation	EPM Architect	(Application Metadata/Profitability Applications/
E E Foundation						
Calculation Manager						
Deployment Metadata						
DPM Architect						

b. Select the artifacts in the following screen capture and export them to a second folder.

Application Management									
plication Management									
🗉 💕 User Directories	Browse Artifact List	V	Artifact Lis	t Artif	act List				
Application Groups	Application: BksSP81								
🖭 🏭 Business Rules	Artifact List Selected Artifacts		Search Artif	and a second					
🖭 🌉 Data Relationship Manageme	Argract List Selected Artiracts								
Default Application Group	Name	Size T	ype	Modified Date	Modifie	Desc	Application Group	App Name	Path
FM7DIM	Configuration	1	Folder				EssbaseCluster-1	BksSP81C	1
PEPSAMP	🔽 Databases	F	Folder				EssbaseCluster-1	BksSP81C	1
ProfWTV	Substitution Variables	1	-older			Coli	EssbaseCluster-1	BksSP81C	1
TRFCST	Configuration	1	Folder				EssbaseCluster-1	BksSP81R	1
🖭 🎇 Disclosure Management	🔽 Databases	F	Folder				EssbaseCluster-1	BksSP81R	1
Essbase Studio Server 11.1.	Substitution Variables	1	older			Coli	EssbaseCluster-1	BksSP81R	1
🖭 🎇 EssbaseCluster-1	AssignmentRules	F	Folder	May 9, 2012			Profitability	BksSP81	1
🖭 🏭 FDM	Drivers	F	Folder	May 9, 2012			Profitability	BksSP81	1
🖭 🎇 Financial Close	✓ Model	1	lolder	May 9, 2012			Profitability	8ksSP81	1
🗉 🌉 FM	POV POV	F	Folder	May 9, 2012			Profitability	BksSP81	1
Foundation	Preferences	F	-older	May 9, 2012			Profitability	BksSP81	1
• DiveLink@demodrive	✓ Stages	1	older	May 9, 2012			Profitability	BksSP81	1
🖭 🎫 Planning									
- E Profitability	1								
Bank.									
BksDP20									

• Do a Repeat Export on the **HPCMAppSuite1** and **HPCMAppSuite2** folders

To do this:

a. Right-click **HPCMAppSuite1** and select **Repeat Export**.

CHyperion Shared Services Console - Windows Internet Explorer				
Eile ⊻iew <u>A</u> dministration <u>H</u> elp �				
Application Management				
Application Group Management				
 ±	Browse			
HPCMAppSuite1 BPMA-EPM Architec HSS-Shared Service	Delete Impo <u>r</u> t Repeat Export	Ctrl+D Ctrl+R Ctrl+X		
HPCMAppSuite2 ESB-Bikes72C ESB-Bikes72R HPCM-Bikes72	Rename	Ctri+E		

b. When prompted for a File System folder name, specify a name or leave the default name.

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

- c. Wait for the export operation to complete.
- d. Right-click **HPCMAppSuite2** and select **Repeat Export**.
- e. When prompted for a File System folder name, specify a name or leave the default name.
- f. Wait for the export operation to complete.

COPYRIGHT NOTICE

EPM System Migrating Oracle Hyperion Profitability and Cost Management Applications, 11.1.2.4

Copyright © 2011, 2015, Oracle and/or its affiliates. All rights reserved.

Authors: EPM Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS:

Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/ or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

