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### ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.4

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| Migrating Oracle Hyperion Profitability and Cost<br>Management Applications | ORACLE |
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CONTENTS IN BRIEF

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| 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.



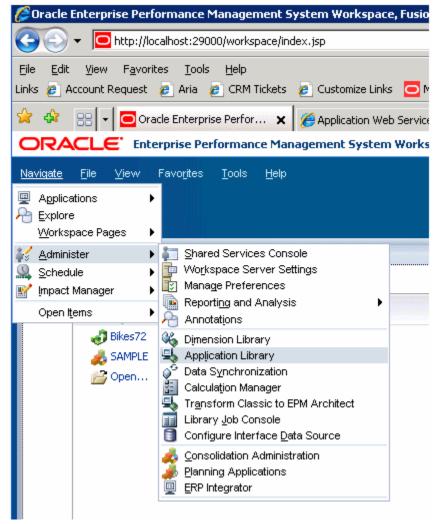
3 Select **OK** when asked if you want to proceed with the import.

| 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<br>🐴 🖹 📂 🎥 Exp | w Favo <u>r</u> ites <u>T</u> ook<br>Nore j 🏟 🤌 🤌 | s <u>A</u> dministration | Help |
|--|---|--------------------------|------|
| HomePage App   | olication Library ×                               |                          |      |
| 1  |   |                          |      |
| Application Library                                      |   |                          |      |
| -  |   |                          |      |
| Bikes72  |   |                          |      |
|  | Edit  |                          |      |
| -  | D <u>u</u> plicate<br>Delete                      | •                        |      |
|  | <u>O</u> pen                                      |                          |      |
|  | <u>∨</u> alidate                                  |                          |      |
|  | Deploy  |                          |      |
| Summary<br>Name : Bikes72<br>Turce : Drofftobility       | Rere <u>g</u> ister<br>Data <u>F</u> low          |                          |      |
| Type : Profitability<br>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<br>Type : Profitability   |
| Created : Thursday, January 19, 2012 2:24:04 AM<br>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><br>Application Management                                      | elp               |        |  |
| oplication Group Management   |                   |        |  |
| <ul> <li>Directories</li> <li>P Application Groups</li> <li>P File System</li> <li>P HPCMAppSuite1</li> </ul> | Browse            |        |  |
| 🖃 📆 HPCMAppSuite2   | Delete            | Ctrl+D |  |
|   | Import            | Ctrl+R |  |
| ESB-Bikes72C  |                   | Ctrl+X |  |

**3** Wait for the import to complete.

| admin | HPCMAppSuite2<br>HPCMAppSuite2<br>HPCMAppSuite2 | 1 | Bikes72C<br>Bikes72R<br>Bikes72 | January 10, 2012<br>07:44:17 | January 10, 2012<br>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<br>III III Manage Allocations<br>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 |                        |                |                            |                 |   |
| <ul> <li>Business Rules</li> </ul> | 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<br>�               |  |                            |  |  |
| Application Management   |  |                            |  |  |
| Application Group Management                                     |  |                            |  |  |
| <ul> <li>±</li></ul>   | Browse                                     |                            |  |  |
| HPCMAppSuite1     BPMA-EPM Architec     HSS-Shared Service       | Delete<br>Impo <u>r</u> t<br>Repeat Export | Ctrl+D<br>Ctrl+R<br>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.

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