



ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.4

Migrating Oracle Hyperion Planning Applications



CONTENTS IN BRIEF

About This Document	2
Setting Up the Environment	2
Exercise 1: Importing Planning Suite Artifacts and Data	3
Exercise 2: Exporting Planning Suite Artifacts and Data	6

About This Document

This document is a tutorial on how to migrate an Oracle Hyperion Planning application from one environment to another. The steps include artifacts and data of Planning and related components including Oracle Hyperion Calculation Manager, Oracle Essbase Server, Oracle Hyperion Financial Reporting, 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 Planning Suite Artifacts and Data](#)

This exercise provides steps to import an entire Planning Suite application. – 15 Minutes

- [Exercise 2: Exporting Planning Suite Artifacts and Data](#)

This exercise provides steps to export application artifacts using Oracle Hyperion Enterprise Performance Management System Lifecycle Management and to export Essbase data using Oracle Essbase Administration Services. – 30 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 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 Planning in Development Environments* located at: http://stdoc-web02.idc.oracle.com:8080/downloads/E40248_01/index.htm.

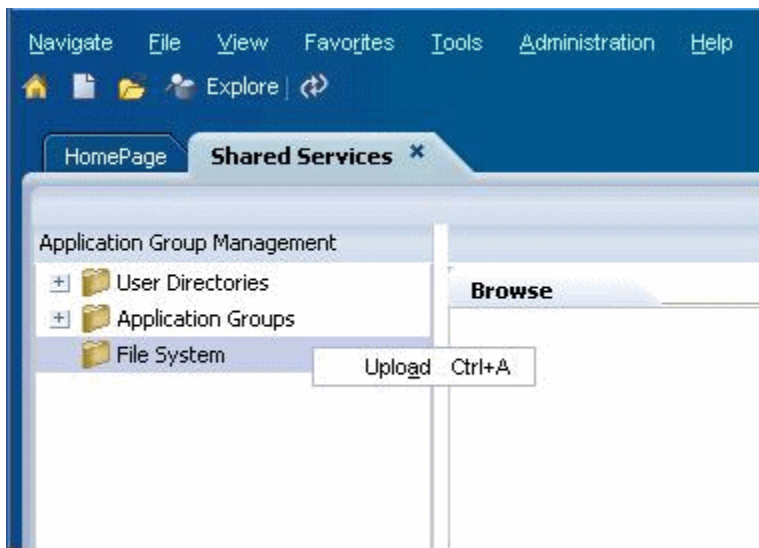
Downloading Sample Data

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. Go to the Oracle Documentation Library on Oracle® Technology Network (<http://www.oracle.com/technology/documentation/epm.html>).

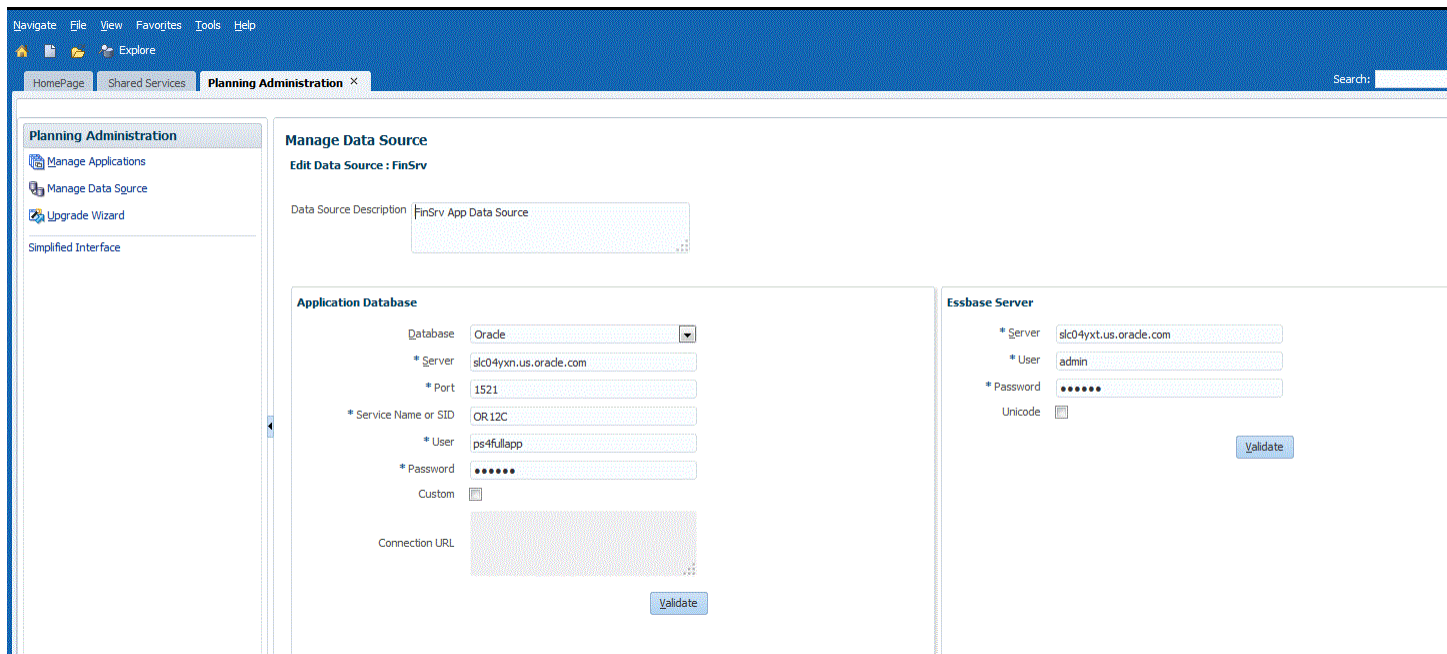
2. Under **Oracle Enterprise Performance Management System Release 11.1.2.4**, click **View Library**.
3. On the **Foundation Services** tab, download the file titled **Migrating Oracle Hyperion Planning Applications - Data**, and unzip its content to your desktop.
You must use 7-Zip to unzip the contents of the file. The name of the actual zip file is `epm_migrate_planning_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**.



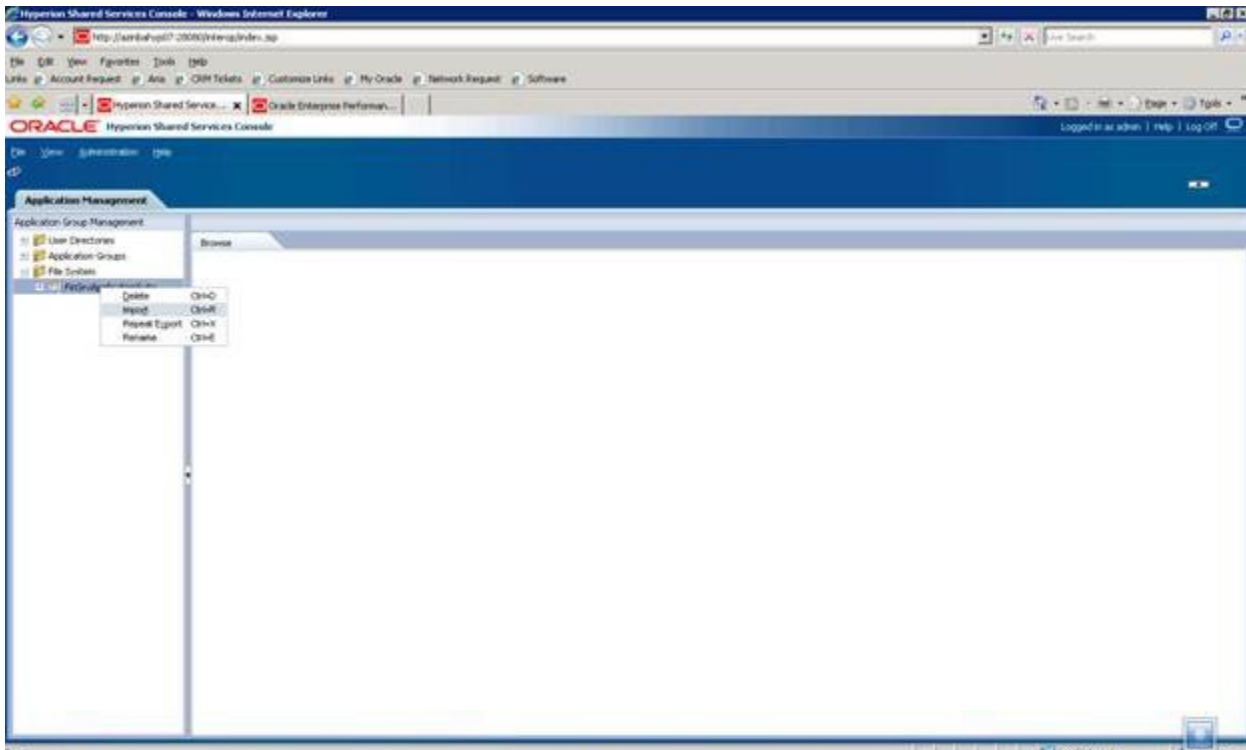
6. Browse to **FinSrvApplicationSuite.zip**, and then select **Upload**.

Exercise 1: Importing Planning Suite Artifacts and Data

- To import Planning Suite artifacts using Lifecycle Management:
 - 1 Log in to EPM Workspace and select **Navigate**, then **Administer**, and then **Planning Administration**. Create a datasource with the name **FinSrv**.

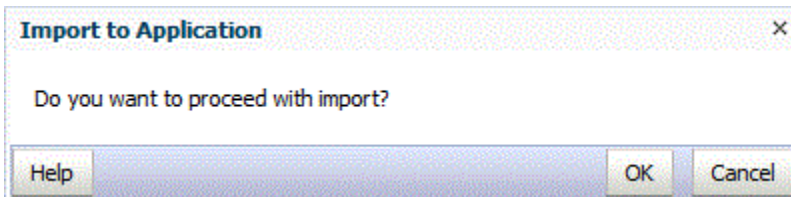


- 2 Click **OK** to save the datasource.
- 3 While still in EPM Workspace, select **Navigate**, then **Administer**, and then **Shared Services Console**.
- 4 Expand **File System**, right-click **FinSrvApplicationSuite**, and select **Import**.



Note that you can also explore and check out artifacts in the File System folder before importing by expanding the folder and then browsing in the right-hand pane. The File System folder has application-related content from Planning, Calculation Manager, Financial Reporting, Oracle Essbase, and Shared Services.

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



6 Wait for the import operation to complete.

Migration Status Report

User	Source	Destination	Start Time	Completed Time	Duration	Status
admin	FinSvcApplica...	Shared Services	January 3, 2012 01:40:23	January 3, 2012 02:06:16	00:25:53	Completed
	FinSvcApplica...	Reporting and...				
	FinSvcApplica...	EssbaseCluste...				
	FinSvcApplica...	FinSvc				
	FinSvcApplica...	Calculation M...				

7 Log in to EPM Workspace and validate that the Planning application has been created successfully. You can also validate the Oracle Hyperion Calculation Manager business rules and the reports in the Reporting and Analysis repository.



Exercise 2: Exporting Planning Suite Artifacts and Data

Subtopics

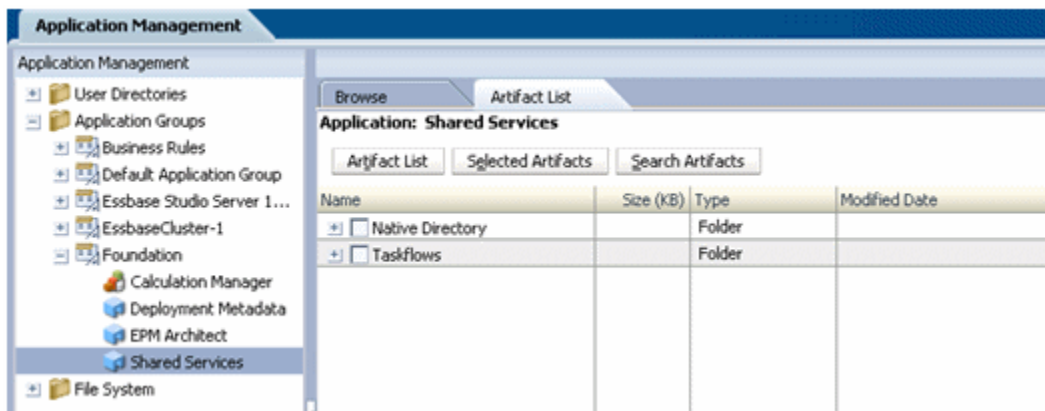
- Step 1: Exporting from the Source
- Step 3: Re-export Artifacts From the Source

Step 1: Exporting from the Source

► To export Planning Suite artifacts and data:

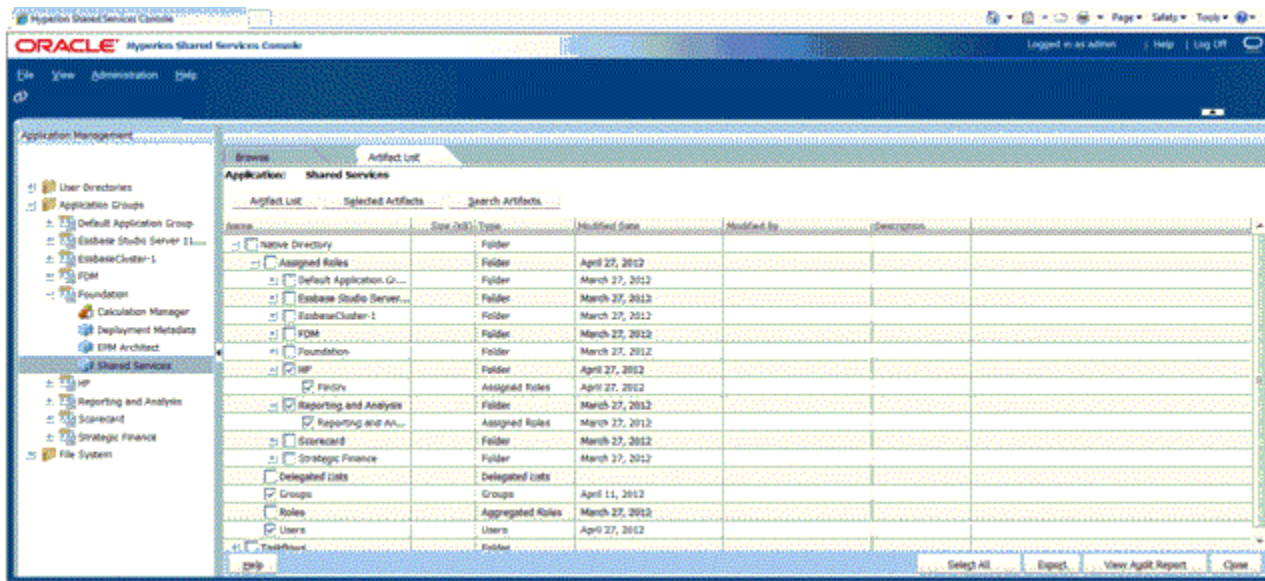
- 1 Log in to Oracle Hyperion Enterprise Performance Management Workspace, `http://web_server_name:port_number/workspace`, and then select **Navigate**, then **Administer**, and then **Shared Services Console**.
- 2 Expand **Application Groups**, then **Foundation**, and then **Shared Services**.
- 3 Click the **Shared Services** node.

In the right pane, you should see all the Oracle Hyperion Shared Services artifacts.



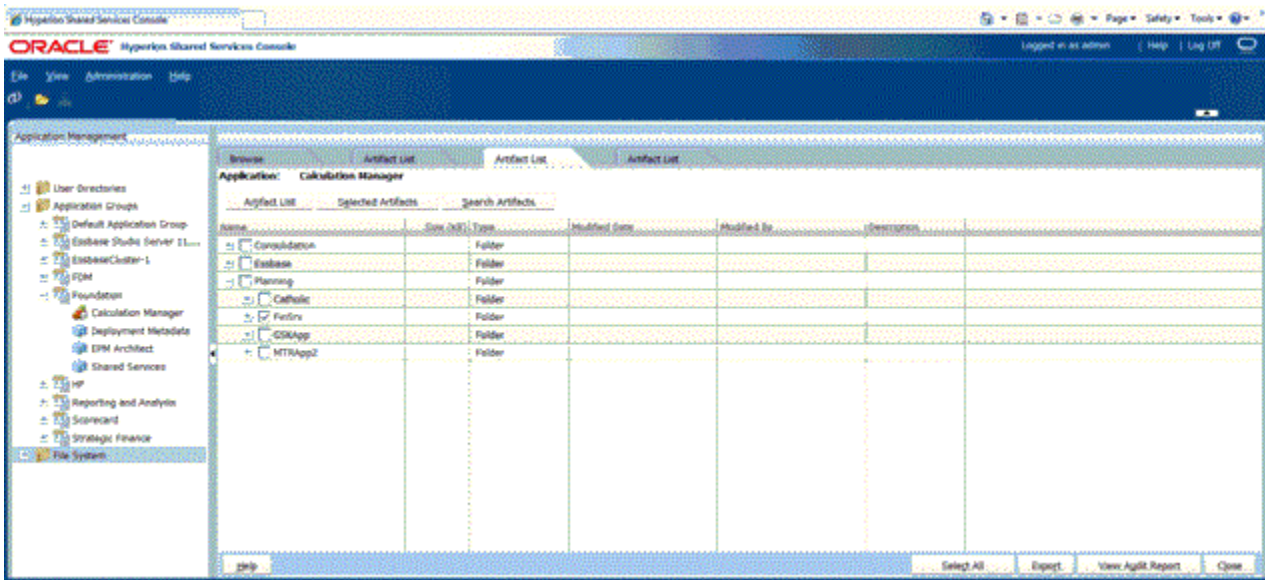
- 4 In the right pane, expand **Native Directory**, and select the **users** and **groups** artifacts.
- 5 Expand **Assigned Roles**, and then **Shared Services** for your Oracle Hyperion Planning application, and then select the Assigned Roles artifact named after the application, `FinSrv`, `Reporting` and `Analysis`.

Your screen should look similar to the following:

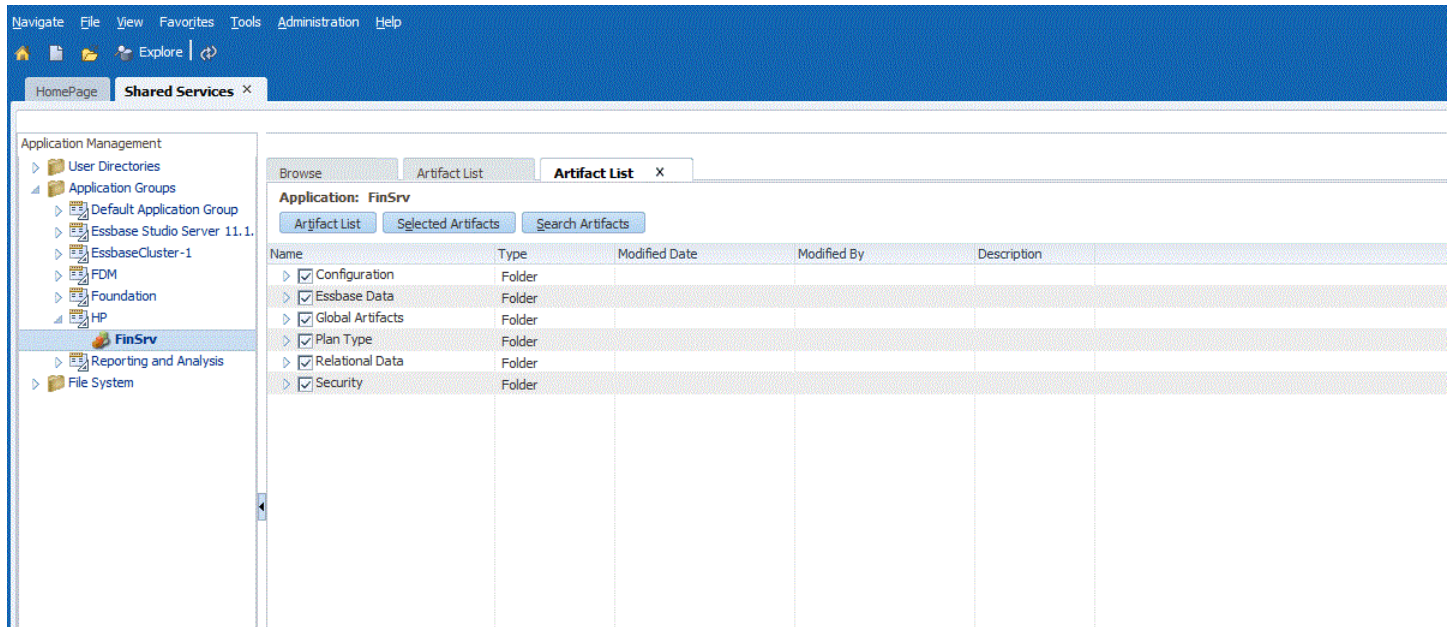


6 In the left pane, select **Foundation**, and then **Calculation Manager**.

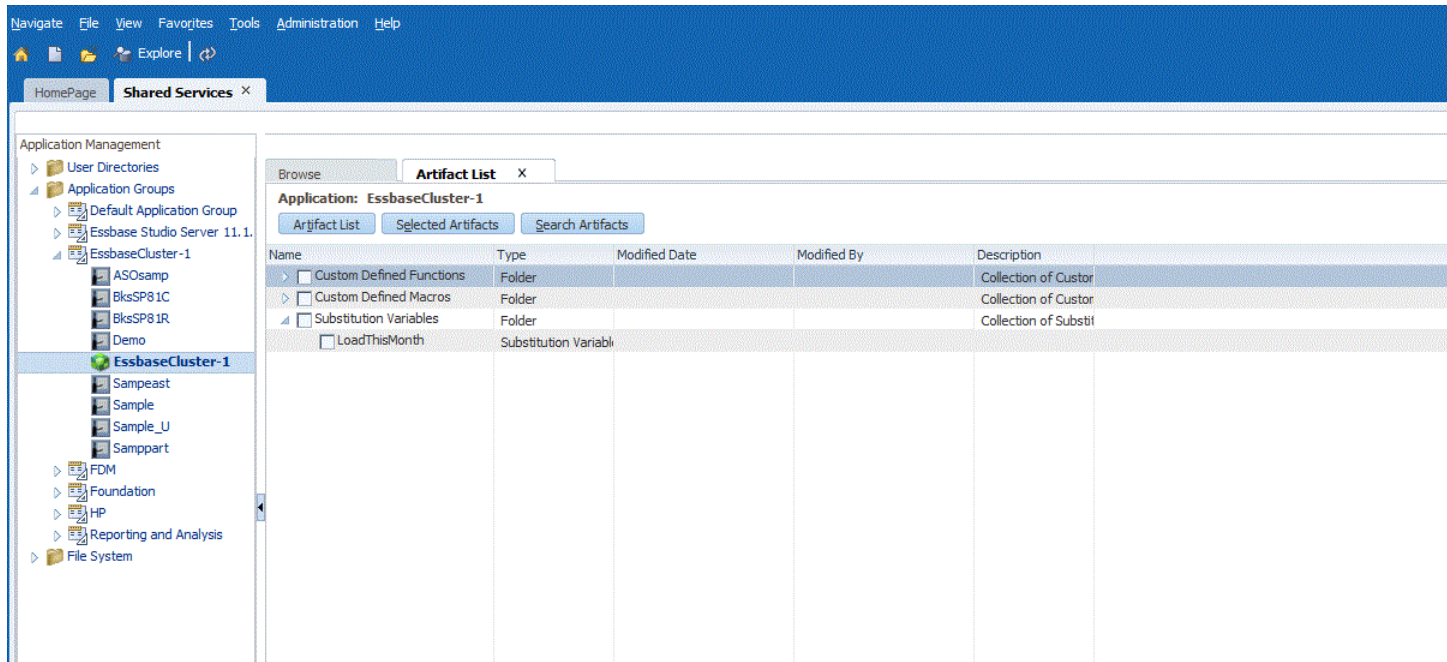
7 In the right pane, expand **Planning** and select the **FinSrv** application.



8 In the left pane, expand the **HP Application** group and explore the **FinSrv** application. You should be able to see all the artifacts of this application in right pane. Select all the artifacts.



- 9 In the left pane, expand **Application Groups**, and then **EssbaseCluster-1**. Select the **EssbaseCluster-1** node. You should now see the **Substitution Variables** folder of **EssbaseCluster-1** listed in the right pane. Select all the artifacts.

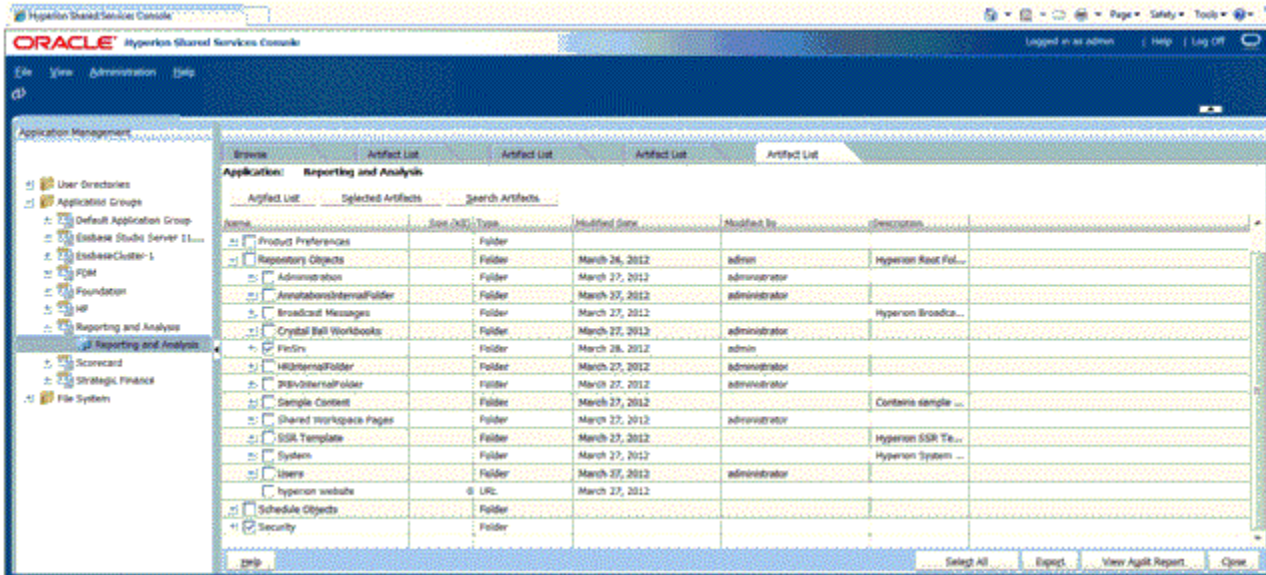


- 10 In the left pane, expand the **Reporting and Analysis** application group and select **Reporting and Analysis**.

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

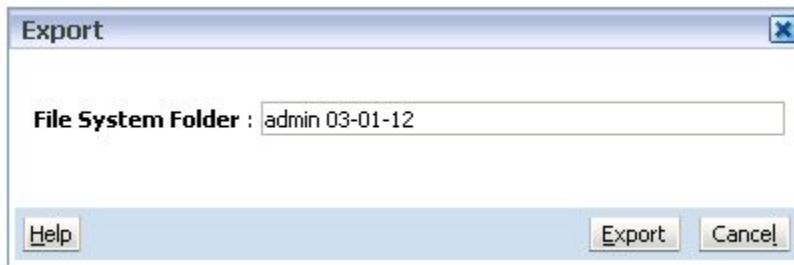
- 11 In the right pane, expand **Repository Objects** and select **FinSrv**; then, expand **Security** and select all users.

These are the Oracle Hyperion Financial Reporting artifacts related to the FinSrv application.



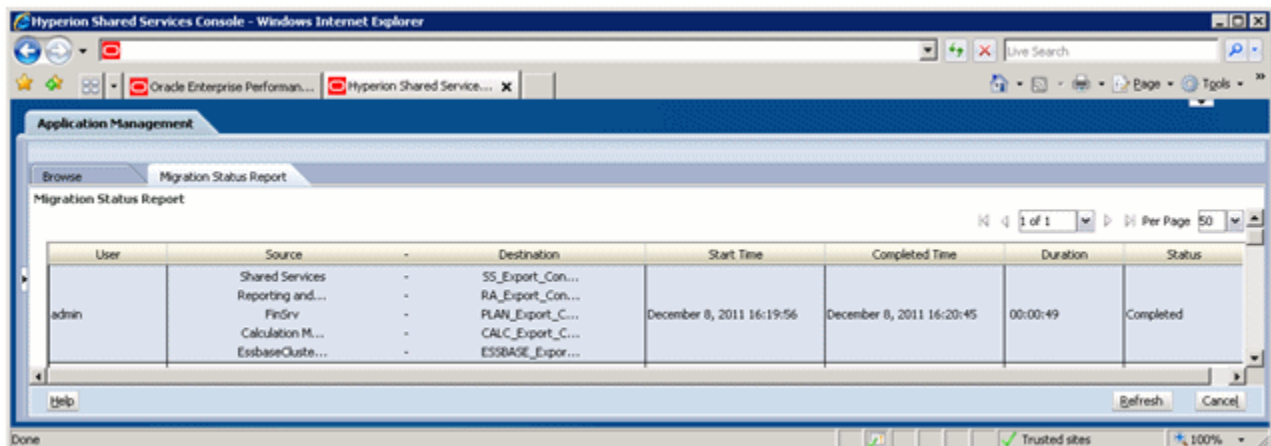
12 Click **Export**.

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



This launches the Migration Status Report.

14 Wait for the migration to complete.



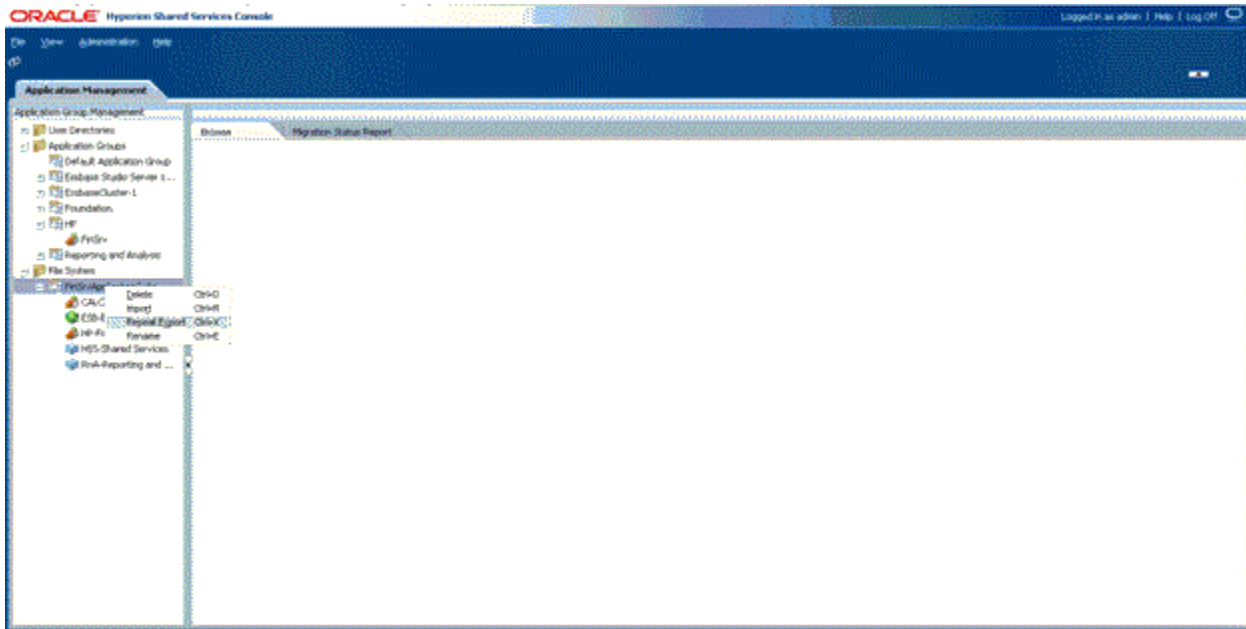
The exported content is available at `EPM_ORACLE_INSTANCE/import_export`.

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

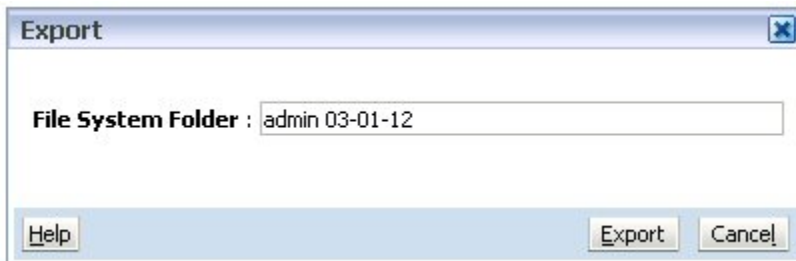
Step 3: Re-export Artifacts From the Source

► To re-export artifacts from the source system:

1 Right-click **FinSrvApplicationSuite** and select **Repeat Export**.



2 When prompted for a File System Folder name, specify a name or leave the default name.



COPYRIGHT NOTICE

EPM System Migrating Oracle Hyperion Planning 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.