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ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.4

Migrating Oracle Hyperion Planning Applications	ORACLE [®]

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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 <code>epm_migrate_planning_app_data.zip</code>.

- 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**.

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File System	plo <u>a</u> d Ctrl+A

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**.

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- 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.

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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.

Import to Application		>
Do you want to proceed with import?		
Help	OK	Cancel

6 Wait for the import operation to complete.

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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.

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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.

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- 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:

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- 6 In the left pane, select Foundation, and then Calculation Manager.
- 7 In the right pane, expand **Planning** and select the **FinSrv** application.

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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.

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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.

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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.

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12 Click Export.

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

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This launches the Migration Status Report.

14 Wait for the migration to complete.

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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**.

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

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Authors: EPM Information Development Team

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