Oracle® Enterprise Performance Management System

Lifecycle Management Guide

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About Lifecycle Management

This chapter provides an overview of the Oracle Hyperion Enterprise Performance Management System Lifecycle Management product. Before you start to use Lifecycle Management, make sure to read Lifecycle Management Requirements.

Lifecycle Management and Migration

Oracle Hyperion Enterprise Performance Management System Lifecycle Management provides a consistent way for Oracle Enterprise Performance Management System products to migrate an application, a repository, or individual artifacts across product environments and operating systems.

Artifacts are individual application or repository items; for example, scripts, web and data forms, rules files, documents, financial reports, and so forth. The application and repository artifacts are organized into categories by product.

The Lifecycle Management interface is integrated with Oracle Hyperion Shared Services Console.

Generally, the Lifecycle Management interface in Shared Services Console is consistent for all EPM System products that support Lifecycle Management. However, EPM System products display different artifact listings and export and import options in the Lifecycle Management interface. For a listing of artifacts and export and import options by product, see the appendixes at the end of this guide.

Lifecycle Management Features

Oracle Hyperion Enterprise Performance Management System Lifecycle Management provides these features:

- Viewing applications and directories
- Searching for artifacts
- Migrating to and from the file system
- Viewing selected artifacts
- Auditing migrations
- Viewing the status of migrations
- Importing and exporting individual artifacts for quick changes on the file system
- Downloading and uploading Lifecycle Management File System folders
- Migrating complete application suites

  You can migrate complete Oracle Hyperion Financial Close Management or Oracle Hyperion Planning suites by selecting all the related artifacts at once and migrating them.
- Migrating multiple applications

You can use Lifecycle Management to migrate multiple Oracle Essbase, Planning, or Oracle Hyperion Financial Management applications using a single migration definition.

Lifecycle Management Components

Oracle Hyperion Enterprise Performance Management System Lifecycle Management consists of these components:

- **LCM Administrator Role**—Oracle Hyperion Shared Services user role that performs Lifecycle Management tasks. The LCM Administrator can use Lifecycle Management to view Shared Services artifacts in the Foundation application group or migrate an application, a repository, or individual artifacts across product environments and operating systems. Any user provisioned with this role has the ability to extract and load artifacts into any Oracle Enterprise Performance Management System product that is registered with the same Shared Services instance.

  > **Note:**
  >
  > Some EPM System products require that Lifecycle Management users be provisioned additional product roles (in addition to the LCM Administrator role) to perform Lifecycle Management tasks. For additional roles, see the appendixes at the end of this guide.

- **LCM Designer Role**—Shared Services user role that performs Lifecycle Management tasks. Users provisioned with the LCM Designer role can define a migration and perform an export operation, but cannot perform an import operation.
- Shared Services Console—Shared Services user interface that enables users to perform administrative tasks such as provisioning and lifecycle management.
- **Migration Definition File**—Contains all the information about a migration (source, destination, artifacts for migration). Artifacts to migrate must be defined in a migration definition. You can create a migration definition from scratch using the sample files provided in the appendixes at the end of this guide, or you can use the XML files in the File System folder in Oracle Hyperion Shared Services Console as migration definition files. The XML files in the File System folder are created when you export artifacts.
- **Migration Options**—A part of Shared Services Console where you input migration export and import options to use during migrations.
- **Migration Properties**—The global parameters for migrations; for example, file system and log file locations, grouping size for batch migrations, enabling or disabling estimate reports, and so on.
- **Migration Status Report**—Provides user info, source and destination information, a progress indicator for "In Progress" migrations, migration date, time, and duration, and migration status (In Progress, Completed, or Failed). Migration detail is provided for migrations showing a status of Failed.
- **Lifecycle Management Log Files—**Capture all Lifecycle Management migration activity.

EPM System Products and Components That Support Lifecycle Management

The following Oracle Enterprise Performance Management System products support Oracle Hyperion Enterprise Performance Management System Lifecycle Management:

- Oracle Hyperion Shared Services
- Oracle Hyperion Calculation Manager
- Oracle Essbase
- Oracle Essbase Studio
- Oracle Hyperion Financial Data Quality Management, Enterprise Edition
- Oracle Hyperion Financial Close Management
- Oracle Hyperion Financial Management
- Oracle Hyperion Planning
- Oracle Hyperion Profitability and Cost Management
- Deployment Metadata
- Document Repository

Table 1-1 EPM System Product Codes

Product Code	Product Name
HUB	Shared Services
HREG	Oracle Hyperion Shared Services Registry
CALC	Calculation Manager
ESBAPP	Essbase
BPM	Essbase Studio
AIF	FDMEE
FCC	Financial Close Management
HFM	Financial Management
HP	Planning
HPM	Profitability and Cost Management

Appendixes containing product-specific information are provided at the end of this guide.

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Getting Started With Lifecycle Management

Related Topics

- Lifecycle Management Requirements
- Installing Lifecycle Management
- Configuring Lifecycle Management for Shared Services High Availability
- Quick Start to Lifecycle Management
- Backup and Recovery
- Security

Lifecycle Management Requirements

Prerequisites to Using

- Install and configure Oracle Hyperion Shared Services and Oracle Enterprise Performance Management System products and verify that they are running.
- Ensure that the user performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations is assigned the LCM Administrator role.
- Assign additional product-specific roles as required. See the appendixes at the end of this guide.

Source and Destination Considerations

- The source and destination environments must use the same user directory.
- During Lifecycle Management export and import operations, the product services must be up and running.

File System Considerations

- When migrating to and from a file system, the file system should be accessible to Oracle Hyperion Shared Services Console or the Lifecycle Management Utility on the network.
- The default destination for the file system is on the Shared Services Java web application server computer; ensure that space is allocated on the Shared Services computer.

  The default file system destination on the Shared Services computer is *MIDDLEWARE_HOME*/user_projects/epmsystem1/import_export. The file system location is defined in the migration properties. This can also be customized to use a shared disk. See Editing Migration Properties.

Upgrade Considerations

When upgrading from the previous release, the content exported from Lifecycle Management must be extracted in the import_export location.

Applications and Application Groups

- If the application being imported does not exist in the target environment, Lifecycle Management creates an application shell.
- Applications must be assigned to an application group or belong to the Default Application Group before migrations can occur. You cannot migrate applications belonging to the Default Application Group if two applications with the same name exist.

> **Note:**
>
> Only the Default Application Group can have multiple applications with the same name. However, artifact migration cannot occur unless they are assigned to another Application Group.

- If the application being imported belongs to an application group that does not exist in the target environment, Lifecycle Management will create the application group.

Availability of the EPM System Environment During Lifecycle Management Migration

Lifecycle Management operations for incremental migration of artifacts can be performed during normal usage of the application with the following exceptions:

- For complete migration of an application or a repository from one environment to another, Oracle recommends that the systems be in maintenance window.
- In Oracle Hyperion Financial Management, if the dimension metadata artifact is imported, the current user sessions of that application are invalidated, and users must reopen the application.

> **Note:**
>
> There are no limitations for Oracle Hyperion Planning, Oracle Hyperion Calculation Manager, Oracle Essbase, and Oracle Hyperion Financial Reporting.

Other Important Points

- Do not use Lifecycle Management as your only means of backup and recovery. See Backup and Recovery.
- Deployment metadata artifacts contain physical server names and configuration information for the deployment. This information should not be migrated from one environment to another (for example, from Dev to Test). Migrating this data would corrupt the configuration information on the destination environment and would make the system unusable. See Deployment Metadata and Lifecycle Management.
- Lifecycle Management migration fails for artifacts and folders with the same name as a Windows-reserved name; for example, CON, PRN, AUX, NUL, and so on.

(For a complete list of reserved names, refer to the vendor's site for your operating system.)

- Single-artifact export should only be used with artifacts that can be modified on the file system. See the product appendixes for information on which artifacts can be modified on the file system.

Installing Lifecycle Management

Oracle Hyperion Enterprise Performance Management System Lifecycle Management is installed with Oracle Hyperion Shared Services.

The components of Lifecycle Management are installed in *EPM_ORACLE_HOME*/common/utilities/LCM/11.1.2.0.

Configuring Lifecycle Management for Shared Services High Availability

When Oracle Hyperion Shared Services is configured for high availability and is started as a Windows service, configuration steps must be performed for Oracle Hyperion Enterprise Performance Management System Lifecycle Management. This scenario involves using a shared disk to store artifacts during migrations. You enter the shared disk location in the `LCM Shared Disk Location` field in EPM System Configurator.

For information on the `LCM Shared Disk Location` field in EPM System Configurator, see "Foundation-Specific Configuration Tasks "in the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*. For information on configuring for high availability, see "Configuring Lifecycle Management for Shared Services High Availability" in the *Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guid*e.

Quick Start to Lifecycle Management

Oracle Hyperion Enterprise Performance Management System Lifecycle Management migrations follow this high-level process. Each part of the process is described in the guides or sections as noted in the table below.

> **Caution:**
>
> Oracle recommends that you back up the destination environment before performing a Lifecycle Management import. Exports and imports using Lifecycle Management are not reversible.

Table 2-1 Lifecycle Management Process

Task	Additional Information
1. Install and configure Oracle Hyperion Shared Services and Oracle Enterprise Performance Management System products.	

Table 2-1 (Cont.) Lifecycle Management Process

Task	Additional Information
2. Assign the LCM Administrator role to Lifecycle Management users. **Note:** Most products require that users be provisioned with additional roles to perform Lifecycle Management tasks. For additional roles, see the appendixes at the end of this guide.	
3. Define import and export options for the migration.	• For Oracle Hyperion Shared Services Console, see Working With Lifecycle Management and Shared Services Console • For the Lifecycle Management Utility, see Using the Lifecycle Management Utility
4. Using the Shared Services Console or the Lifecycle Management Utility, export the artifacts to the file system. 1. Select all Shared Services artifacts as required. 2. Select all product-specific artifacts as required. All related artifacts can also be selected; for example, Oracle Hyperion Calculation Manager rules, Oracle Hyperion Financial Reporting reports, Oracle Essbase global substitution variables, and so on. 3. Export the selected artifacts to a single File System folder.	Exporting to the File System.
5. Complete any product-specific migration prerequisites.	"Migration Prerequisites" section for each product. See the appendixes at the end of this guide.
6. Back up the destination environment.	
7. Using Shared Services Console or the Lifecycle Management Utility, import the artifacts from the file system. Right click the exported File System folder, and then select **Import**.	Importing from the File System.
8. View the Migration Status Report to ensure that everything migrated successfully.	Migration Status Report.

Backup and Recovery

Oracle Hyperion Enterprise Performance Management System Lifecycle Management does not replace the need for a physical backup of servers and content. Because Lifecycle Management can export most application artifacts, it is well-suited for archiving application content. You can use Lifecycle Management for the following use cases:

- Making a temporary backup of artifacts when a business user wants to edit the application content. For example, if a change must be made to a dimension in Oracle Essbase or Oracle Hyperion Planning, to ensure that the changes can be reverted if something goes wrong, you can perform an Lifecycle Management export of the dimension before making edits. This exported dimension will serve as a temporary backup. Then you can edit the dimension in the product.

- Archiving artifacts before performing an import: If you are migrating content from a test system to production, you may want to archive the production artifacts by exporting them and checking the same into any version control system.

> **Note:**
>
> Lifecycle Management can be used only as a logical backup and recovery solution and is not recommended as a solution for backing up and recovering data. Many products provide their own data backup and recovery solutions. These solutions are documented in the *Oracle Enterprise Performance Management System Backup and Recovery Guide*.

Security

To use Oracle Hyperion Enterprise Performance Management System Lifecycle Management, security must be set up for users and groups through provisioning. The user who runs Lifecycle Management must have an LCM Administrator role assignment. The LCM Administrator can perform migrations for any applications registered to Oracle Hyperion Shared Services. In other words, the LCM Administrator can extract and load to any application using the same Shared Services instance.

> **Note:**
>
> Deployment metadata, Oracle Essbase, Oracle Essbase Studio, Oracle Hyperion Financial Management, Oracle Hyperion Planning, and Oracle Hyperion Profitability and Cost Management require that Lifecycle Management users be provisioned additional product roles (in addition to the LCM Administrator role) to perform Lifecycle Management tasks. For additional roles, see the appendixes at the end of this guide.

For information about assigning the LCM Administrator role, see the *Oracle Enterprise Performance Management System User Security Administration Guide* .

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Lifecycle Management Use Cases

Related Topics

- Shared Services Use Cases
- Artifact Migration Use Cases
- Using Lifecycle Management With Version Control Systems
- Integrating Lifecycle Management with Existing Workflow Systems

Shared Services Use Cases

Native Directory (Security) Migrations and Bulk Security Updates

Oracle Hyperion Enterprise Performance Management System Lifecycle Management migrates artifacts (assigned roles, delegated lists, groups, roles, and users) from one system to another. Lifecycle Management helps you define the artifacts to migrate. Additionally, with Lifecycle Management, you can make bulk security updates within an environment; for example, you can change all the security assignments for a user or a set of users.

See Migrating Native Directory (Security).

Migrating Taskflows

You can use Lifecycle Management to migrate Oracle Hyperion Shared Services taskflow artifacts for the following Oracle Enterprise Performance Management System products:

- Oracle Hyperion Financial Management
- Oracle Hyperion Profitability and Cost Management

Taskflow artifacts enable you to migrate taskflow definitions from one environment to another or to edit taskflow definitions on the file system. For more information, see Shared Services and Lifecycle Management.

Editing Shared Services Registry Data

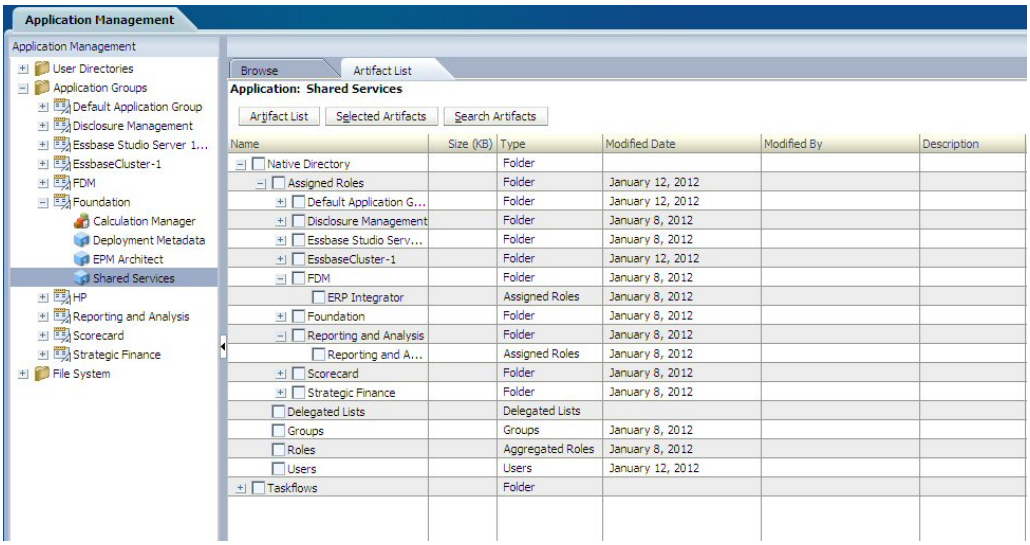
You can use Lifecycle Management to edit Oracle Hyperion Shared Services Registry data to enable or disable Secure Socket Layer (SSL) connections and to perform other manual configuration changes. See Editing Shared Services Registry Data.

Migrating Provisioning Artifacts for a Specific EPM System Application

Lifecycle Management enables you to migrate provisioning artifacts for a specific application without migrating provisioning for all applications. Provisioning artifacts are displayed under the Native Directory (Assigned Roles) node in the Oracle Hyperion Shared Services Console.

The following image illustrates where to find the provisioning artifacts in Shared Services Console.

Figure 3-1 Provisioning Artifacts in Shared Services Console



For procedural information, see Migrating Native Directory (Security).

Migrating with the LCM Designer Role

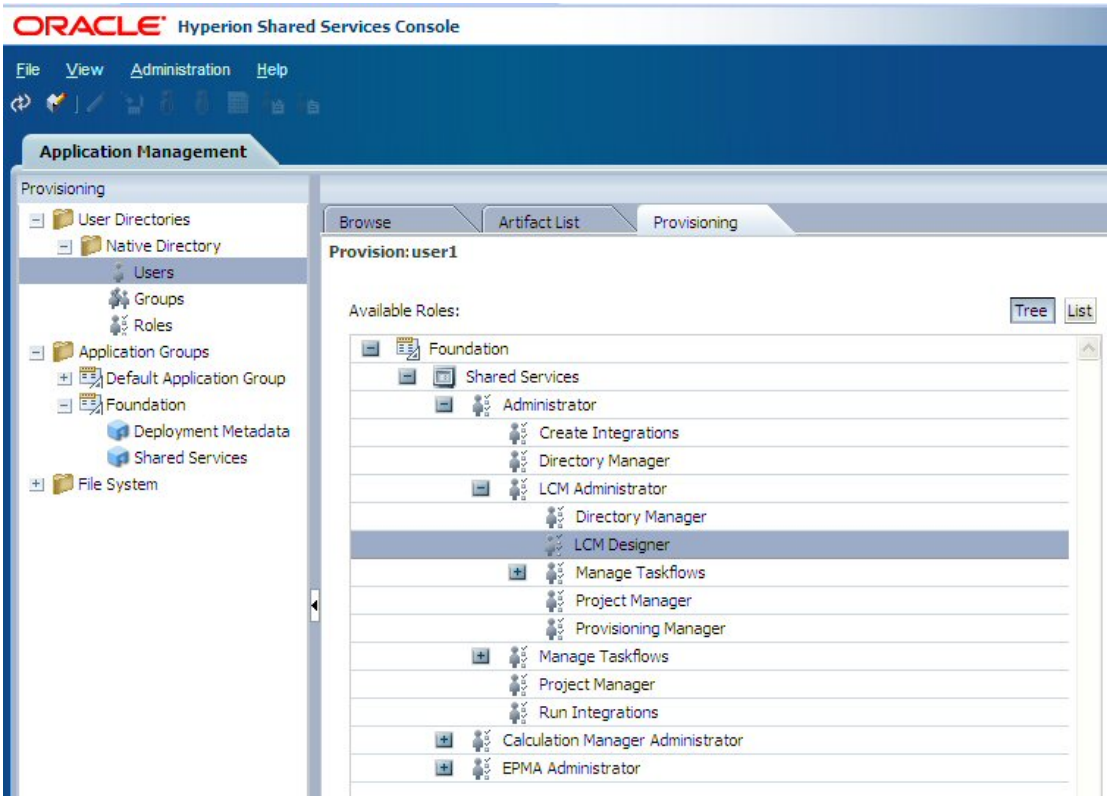
Import operations in Lifecycle Management require an analysis of the target environment and are typically performed by administrators. The content to migrate, however, is typically defined by the business users of the application because they are aware of the changes in the system. The LCM Designer role allows a user to define a migration and perform an export operation, but restricts the user from performing an import operation.

For example, consider the following scenario:

A planning administrator who is responsible for managing the expense budgets modifies the data form pertaining to expense accounts in the test environment. Assigning the planning administrator the LCM Designer role allows the administrator to define the migration to move the data form into production. The administrator then notifies the IT Manager that the artifacts are exported. The IT Manager copies the exported folder to production and performs the import operation. (The exported folder contains the definition for performing an import in the `Import.xml` file.)

The LCM Designer role is assigned in Shared Services Console. (See "EPM System Roles" in the *User Roles and Security Guide*.)

Figure 3-2 LCM Designer Role in Shared Services Console



When a user is assigned the LCM Designer role, Shared Services Console has the following changes:

- The ability to import a single artifact after editing is disabled.
- The Import option displayed when you right-click a File System folder is disabled.
- The Import button at the bottom of Shared Services Console is disabled.

Artifact Migration Use Cases

Application Migrations with Cross-Product Artifact Dependencies

To ensure a successful migration, Oracle Hyperion Enterprise Performance Management System Lifecycle Management enforces a specific order when importing artifacts, but only at the product level. Lifecycle Management does not automatically order the import of artifacts across multiple products (at the artifact level). For example, a Oracle Hyperion Financial Management application might consist of dimensions and business rules, user provisioning from Oracle Hyperion Shared Services, and reports from Oracle Hyperion Financial Reporting.

When using Lifecycle Management to migrate artifacts from multiple products, you must ensure that the cross-product dependent artifacts are present at the destination before importing the product artifacts. This is especially important when performing a first-time Lifecycle Management migration.

The following documents provide step-by-step instructions on how to perform first-time Lifecycle Management migrations:

- *Oracle Enterprise Performance Management System Migrating Oracle Hyperion Planning Applications*
- *Oracle Enterprise Performance Management System Migrating Oracle Hyperion Profitability and Cost Management Applications*
- *Oracle Enterprise Performance Management System Migrating Oracle Hyperion Financial Management Applications*

See the documentation library at http://docs.oracle.com/cd/E57185_01/index.htm.

Exporting and Importing Artifacts for Editing Purposes

Oracle Hyperion Enterprise Performance Management System Lifecycle Management enables you to export artifacts to the file system, edit them, and import them after editing. For detailed instructions, see Exporting and Importing Individual Artifacts for Editing.

Editing a Single Artifact

Oracle Hyperion Shared Services Console enables you to export individual artifacts to the file system, edit them, and import them after editing without requiring a migration definition file. For detailed instructions, see Exporting and Importing Individual Artifacts for Editing.

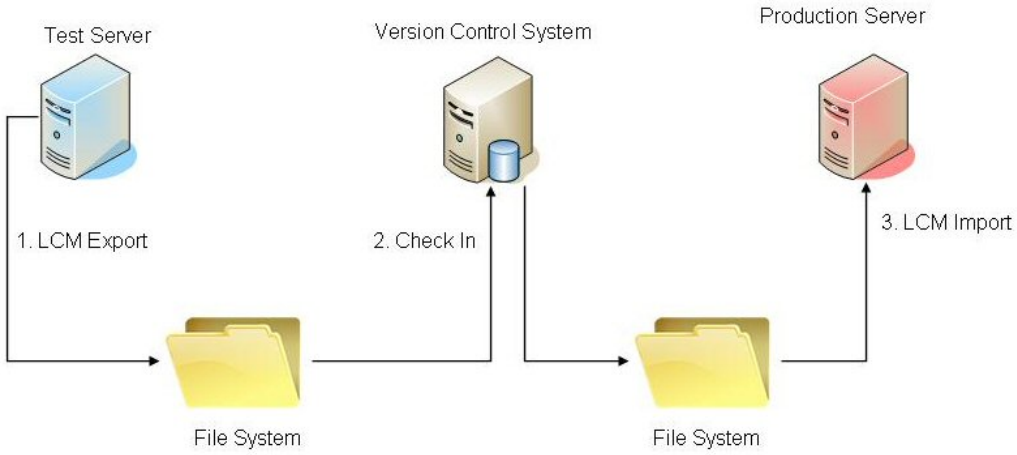
> **Note:**
>
> Not all artifacts are editable on the file system. See Editing Individual Artifacts.

Artifacts must be imported back into the same application from which they were exported.

Using Lifecycle Management With Version Control Systems

With Oracle Hyperion Enterprise Performance Management System Lifecycle Management, you can use your existing document or source code-control systems, such as Oracle® Universal Content Management, to version Oracle Enterprise Performance Management System artifacts. The most effective approach is to export artifacts to the file system and then import them to the version control system before importing them into production.

Figure 3-3 Version Management Using Lifecycle Management



This approach can be automated in several ways, depending on the production control tool used. For example, automation can be achieved by writing a script that first imports the exported artifacts to the version control system and then imports to the production system. By inserting this change in the process, we ensure that the artifacts in the production system are always in the corporate version control system with proper date metadata. Then the customer can answer questions, such as: if the system was working properly last week and it is not working now, what changes to the artifacts have been migrated to production during the last week? If the version control system supports a compare feature, it can provide differences for EPM System artifacts that are text- or XML-based.

For details about migrating to and from the file system, see Migrating Artifacts.

Integrating Lifecycle Management with Existing Workflow Systems

You can integrate Oracle Hyperion Enterprise Performance Management System Lifecycle Management with existing workflow systems using Java APIs or a command-line utility. In most cases, the command-line utility is sufficient, because the logic of the migration is captured in the migration definition file. The migration definition file (an XML file) can be created using the Lifecycle Management functionality in Oracle Hyperion Shared Services Console, or it can be created programmatically by the workflow system.

If you use the migration definition file created by Shared Services Console, it must be programmatically modified to add the user's credentials to it. These credentials must be in plain text when inserted into the XML file but will be automatically encrypted the first time the migration is executed. Once the migration definition file is created, it can be invoked by the production management system using a command-line utility or Java API.

4
Shared Services Console

Related Topics

- Overview of Shared Services Console
- Launching Shared Services Console
- Lifecycle Management and Shared Services Console Integration

Overview of Shared Services Console

Oracle Hyperion Shared Services Console consists of a View pane and task tabs. When you initially log in, the Shared Services Console displays the View pane and a Browse tab.

The View pane is a navigation frame where you can choose objects (such as user directories, users, groups, roles, application groups, and applications). Typically, details of your current selection in the View pane are displayed on the Browse tab. Additional task tabs open depending on the task that you perform; for example, a Report tab opens when you generate a report, and a Configure tab opens when you configure a user directory.

Depending on the current configuration, Shared Services Console lists your existing objects in the View pane. You can expand these object listings to view details. For example, you can expand the User Directories object to view a list of all configured user directories. You can also search configured user directories for users and groups.

A shortcut menu, accessible by right-clicking an object, is associated with some objects on the View pane.

Shortcut menus associated with objects in the View pane provide the quickest method to perform operations on the objects. Options in shortcut menus change dynamically, depending on what you select. The commands in the shortcut menu also are available in a menu in the menu bar. Buttons representing enabled menu options are displayed on the toolbar.

Launching Shared Services Console

You use a menu option in Oracle Hyperion Enterprise Performance Management Workspace to access Oracle Hyperion Shared Services Console.

> **Note:**
>
> EPM Workspace is a portal from which you can access other Oracle Enterprise Performance Management System products. The Oracle Hyperion Shared Services roles assigned to the current EPM Workspace user determines the resources available to the user in Shared Services Console.

To launch Shared Services Console:

1. Go to:

   `http://Web_server_name:port_number/workspace`

   In the URL, *Web_server_name* indicates the name of the computer where the web server used by Oracle Hyperion Foundation Services is running, and *port_number* indicates the Web server port; for example, `https://myWebserver:19000/workspace`.

   > **Note:**
   >
   > If you are accessing EPM Workspace in secure environments, use `https` as the protocol (not `http`) and the secure Web Server port number. For example, use a URL such as: `https://myWebserver:19043/workspace`.

2. Click **Launch Application**.

   Note that pop-up blockers may prevent EPM Workspace from opening.

3. In the **Log On** window, enter your user name and password.

   Initially, the only user who can access Shared Services Console is the EPM System Administrator whose user name and password were specified during the deployment process.

4. Click **Log On**.

5. From EPM Workspace, select **Navigate**, then **Administer**, and then **Shared Services Console**.

Lifecycle Management and Shared Services Console Integration

Oracle Hyperion Enterprise Performance Management System Lifecycle Management is integrated with Oracle Hyperion Shared Services Console, and the artifacts are listed under Application Groups and Applications. For example, in Shared Services Console, an application group called Development is displayed. Under the Development application group, an HFM Management Reporting application is displayed. Under the HFM Management Reporting application, dimensional and nondimensional models are displayed (Accounts, Entities, Security, Member Lists, and so on).

5

Working with Applications and Application Groups

Related Topics

- Overview
- Working with Application Groups
- Managing Applications

Overview

Application groups and applications are important Oracle Enterprise Performance Management System concepts. An application is a reference to a single instance of an EPM System product that is registered with Oracle Hyperion Shared Services. Provisioning and Oracle Hyperion Enterprise Performance Management System Lifecycle Management activities are performed against an application. Generally, applications are grouped into application groups.

Working with Application Groups

Generally, when you deploy an application, Oracle Enterprise Performance Management System places the application in an existing application group of your choice or into the default application group.

An application group is a container for EPM System applications. For example, an application group may contain a Oracle Hyperion Planning application. While an application can belong to only one application group, an application group can contain multiple applications.

EPM System products place their applications into their own application groups. If an EPM System product does not create its own application group, you can select one; for example, Default Application Group, to organize the applications.

Applications that are registered with Oracle Hyperion Shared Services but are not added to an application group are listed under the Default Application Group node in the View pane. You can provision users and groups with roles from applications listed in the Default Application Group node and then move the application to an application group without losing provisioning information. You can create custom application groups, if needed.

> **Note:**
>
> You must be a Shared Services Administrator or Project Manager to create and manage application groups. Shared Services Administrators can work with all registered applications; a Project Manager can work only with the applications for which that person is the provisioning manager.

Creating Application Groups

During application group creation, you can also assign applications to the new application group.

To create an application group:

1. Launch Oracle Hyperion Shared Services Console.

   See Launching Shared Services Console.

2. In the View pane, right-click **Application Groups**, and then select **New**.

   The New Application Group screen opens.

3. For **Name**, enter a unique application group name, and, for **Description**, enter an optional description.

4. To assign applications to this application group:

   - From **List Applications in Application Group**, select an application group that contains the application that you want to assign.
   - Click **Update List**.

     The **Available Applications** list displays the applications that you can assign to the application group.
   - From **Available Applications**, select the applications to assign to the application group, and then click **Add**.
   - To remove an assigned application, from **Assigned Applications**, select the application to remove, and then click **Remove**. To remove all applications that you assigned in the current session, click **Reset**.

   a. From **List Applications in Application Group**, select an application group that contains the application that you want to assign.

   b. Click **Update List**.

      The **Available Applications** list displays the applications that you can assign to the application group.

   c. From **Available Applications**, select the applications to assign to the application group, and then click **Add**.

   d. To remove an assigned application, from **Assigned Applications**, select the application to remove, and then click **Remove**. To remove all applications that you assigned in the current session, click **Reset**.

5. Click **Finish**.

6. Click **Create Another** to create another application group, or click **OK** to close the status screen.

Modifying Application Group Properties

You can modify all properties and settings of an application group, including application assignments.

> **Note:**
>
> You can also add applications to application groups by moving them from another application group. See Moving Applications.

To modify an application group:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. From the View pane, select **Application Groups**.
3. On the **Browse** tab, right-click the application group, and then select **Open**.
4. Modify the application group properties as needed.

   See Creating Application Groups for information on assigning or removing applications.
5. Click **Save**.

Deleting Application Groups

Deleting an application group removes the association of applications with the application group, removes provisioning assignments from applications, and deletes the application group.

To delete an application group:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. In the View pane, right-click the application group, and then select **Delete**.
3. Click **Yes**.

> **Note:**
>
> You cannot delete the Default Application Group or the Foundation Application Group. You also cannot delete the File system node in Shared Services Console.

Managing Applications

Oracle Hyperion Shared Services tracks registered Oracle Enterprise Performance Management System applications. Generally, EPM System products are registered with Shared Services when you deploy them using EPM System Configurator. EPM System application instances are registered with Shared Services when you deploy them.

Registering some applications creates application groups and assigns applications to them. If registration does not create an application group, the application is listed under the Default Application Group. You can provision these applications. When you move applications from the Default Application Group to an application group, Shared Services retains the provisioning information. You can migrate applications under the Default Application Group, even if they are not assigned to an application group.

> **Note:**
>
> Only the Default Application Group can have multiple applications with the same name. However, artifact migration cannot occur unless applications are assigned to another Application Group.

Moving Applications

Moving an application from an application group removes the association between the application and the application group.

To move an application:

1. Launch Oracle Hyperion Shared Services Console.

   See Launching Shared Services Console.
2. Expand the node of the application group that contains the application to move.
3. Right-click the application and select **Move To**.
4. On the **Move To** tab, select the application group to which you want to move the application.
5. Click **Save**.

> **Note:**
>
> You cannot move Shared Services and Deployment Metadata applications from the Foundation application group.

Deleting Multiple Applications

When Shared Services administrators delete applications, the provisioning information also is deleted.

To delete multiple applications:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. In the View pane, right-click **Application Groups**, and then select **Delete Applications**.
3. Select the applications to delete.

   To delete all applications within an application group, select the application group.

   > **Note:**
   >
   > You cannot delete application groups from this screen. See Deleting Application Groups.
4. Click **Delete**.

5. Click **OK**.

Deleting an Application

Shared Services administrators can delete applications from application groups. When you delete an application from an application group, all provisioning information for that application is removed.

To delete an application:

1. Launch Shared Services Console.

   See Launching Shared Services Console.

2. In the View pane, expand the node of the application group that contains the application to delete.
3. Right-click the application, and then select **Delete**.
4. Click **OK**.

6

Working With Lifecycle Management and Shared Services Console

Related Topics

- Viewing Artifacts
- Searching Artifacts
- Migrating Artifacts
- Editing Shared Services Registry Data
- Editing Migration Properties
- Purging Migration Data
- Lifecycle Management Reports

Viewing Artifacts

The Oracle Hyperion Enterprise Performance Management System Lifecycle Management interface in Oracle Hyperion Shared Services Console enables you to view, search, export, and import artifacts. The artifacts are sorted into categories so that they are exposed in an organized manner.

The tabular Lifecycle Management interface enables you to view multiple applications.

> **Note:**
>
> Artifacts vary by product. For a detailed list of product artifacts and categories, see the appendixes at the end of this guide.

To view artifacts in Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. Expand the **Application Groups** node in the View pane to view application groups.
3. Expand an application group to view applications.

> **Note:**
>
> The **Foundation** application group contains Foundation applications such as Oracle Hyperion Calculation Manager, Deployment Metadata, and Oracle Hyperion Shared Services. The **File System** node reads the default Shared Services file system location (defined in EPM System Configurator).

4. Select an application to view the artifact listing (or right-click the application and select **Explore**).

   An **Artifact List** tab displays the artifact listing.

   Above the artifact listing, these view options are displayed:

   - **Artifact List**—Displays application and repository artifacts

     A new tab is displayed for each Application Group. After a migration completes, the tabs close.

   - **Selected Artifacts**—Displays all previously selected artifacts on one tab

     The Lifecycle Management interface remembers the artifacts that you have selected as you move between the applications and application groups. This functionality is useful when defining an application migration consisting of multiple products.

   - **Search Artifacts**—Displays artifact search options

Searching Artifacts

You can view artifact search options using the Search Artifacts option above the artifact listing.

To search for artifacts in Oracle Hyperion Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.

2. View artifacts. See Viewing Artifacts.
3. On the **Artifact List** tab, click **Search Artifacts**.
4. Enter search options:

   - **Artifact Name**—The name of the artifact. Use an asterisk (*) as the wildcard in pattern searches or to search for artifacts that match filter conditions. For example, entering `A*` returns all artifacts that begin with A (or lowercase a, because the search is not case-sensitive). `*A` returns all artifacts that end with A (or lowercase a).
   - **Date Modified**—Choose from these options:
     - **Today**—Artifacts modified today
     - **Yesterday**—Artifacts modified yesterday
     - **Last 7 days**—Artifacts modified within the last seven days
     - **Last Month**—Artifacts modified last month

  - **Date Range**—Artifacts modified within a specified date range (start and end dates, inclusive).

> **Note:**
>
> Artifacts that do not support the modified date are always displayed.
>
> For a listing of artifacts that do not support the modified date or time, see the appendixes at the end of this guide.

- **Start Date**—Beginning date of date range; for example, 01/01/2008
- **End Date**—Ending date of a date range; for example, 01/31/2008
- **Modified By**—Name of the user. Use an asterisk (*) as the wildcard in pattern searches or to search for artifacts that match filter conditions. The search is not case-sensitive.

> **Note:**
>
> If no search criteria is entered, all artifacts for the application are displayed.

5. Click **Search**.

Migrating Artifacts

You can migrate artifacts to and from the file system in the following instances:

- When the source and destination are registered to the same Oracle Hyperion Shared Services instance
- When the source and destination are registered to different Shared Services instances but with a shared file system

If the source and destination are not registered to the same Shared Services instance and are not on the same network, you can export artifacts to an intermediary file system and use FTP, DVD, or another transfer method to transfer the intermediary file system to the destination system.

> **Note:**
>
> In a transfer scenario, ensure that the file system folder is copied directly into the `import_export` folder in *`MIDDLEWARE_HOME`*`/user_projects/epmsystem1`.

Exporting to the File System

The file system location is on the Shared Services Java web application server computer. The default destination on the Shared Services computer is *`MIDDLEWARE_HOME`*`/user_projects/epmsystem1/import_export`. Applications or artifacts exported (or copied) to the file system location are displayed under the File System node in the View pane. When

artifacts are exported to the file system, they retain the last modified time the artifact was updated in the native product.

To export artifacts and applications to the file system using Oracle Hyperion Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.

2. Select **Administration**, and then **Migration Options**.

3. On the **Migration Options** tab, review the export options for the migration.

   Only the options for the products that are installed are displayed. The options differ by product, and not all products have export options. You can accept the default options without making any changes if desired.

   For a listing of options by product, see Setting Migration Options, or refer to the appendixes at the end of this guide.

4. If you made any changes to the migration options, click **Save**.

5. Expand the **Application Groups** node and select the applications to export.

   When you select an application, an **Artifact List** tab displays the application and repository artifacts for that application.

6. On the **Artifact List** tab for each application, select the artifacts to export.

   > **Note:**
   >
   > You cannot migrate (export or import) Financial Reporting User Preferences using Oracle Hyperion Enterprise Performance Management System Lifecycle Management.

   To select an individual artifact, click the checkbox next to the artifact. To select all the artifacts, click **Select All**.

7. Click the **Export** button at the bottom right of Shared Services Console.

8. In the **Export** dialog box, enter the **File System Folder** where the artifacts will be exported, and then click **Export**.

   A default file system folder name is displayed in the format of `username DD-MM-YY Hour_Min`; for example, `admin 03-01-12 09_32`. You can either accept the default or enter a different file system folder name.

   Note that Lifecycle Management does not allow characters in a folder name that are not supported by the native operating system. For example, Windows does not allow colons in a folder name, so neither does Lifecycle Management.

   All the applications and artifacts selected are exported to the specified file system folder. (You do not need to specify different file system folders if you have more than one application.)

   If you specify a file system folder name that already exists on the file system, you will be prompted to provide a new file system folder name.

9. View the migration status on the **Migration Status Report** tab.

   See Migration Status Report.

After the artifacts are successfully migrated, a new file system folder is created under the **File System** node in Shared Services Console. When you expand the file system folder, the applications are displayed with the product name followed by the application name.

> **Tip:**
>
> Artifacts that are migrated to the file system can be secured. The first level of security is file system security. To limit access to artifacts on the file system, modify the permissions on the `import_export` folder to ensure that the user who starts Shared Services has full permissions on the `import_export` folder; no other user has these permissions. If an additional level of security is needed, the content of the `import_export` folder can be moved to a password-protected container such as Winzip, or it can be encrypted on the file system using PGP or other data encryption methods. Ensure that before the artifacts are imported from the file system, they are unencrypted by the authorized user.

Re-exporting Artifacts to the File System

You can re-export artifacts to the file system if desired. To re-export artifacts, right-click a folder under the File System node and select **Repeat Export**.

When you repeat an export, the artifacts get exported into a new file system folder. To re-import the artifacts, right-click the folder under the File System node and select **Import**. (You should check the migration options set for the product before importing.)

Importing from the File System

The file system location is on the Shared Services Java web application server computer. The default destination on the Shared Services computer is *`MIDDLEWARE_HOME`*`/user_projects/epmsystem1/import_export`. Applications or artifacts exported (or copied) to the file system location are displayed under the File System node in the View pane. When artifacts are exported to the file system, they retain the last modified time the artifact was updated in the native product.

To import artifacts and applications from the file system using Shared Services Console:

1. Back up the destination environment.
2. Launch Shared Services Console.

   See Launching Shared Services Console.
3. Select **Administration**, and then **Migration Options**.
4. On the **Migration Options** tab, define the import options for the migration.

   Only the options for the products that are installed are displayed. The options differ by product, and not all products have import options. You can accept the default options without making changes if desired.

   For a listing of options by product, see Setting Migration Options, or refer to the appendixes at the end of this guide.
5. Expand the **File System** node and select the applications to import.

   When you select an application, an **Artifact List** tab displays the application and repository artifacts for that application.
6. Import the artifacts in one of the following ways:

- Right-click a File System folder, and then select **Import**.

  This imports all the applications in that folder. If you select to import a File System folder, a dialog box is displayed asking you to confirm that you want to proceed with the import.

- Right-click an individual application under a File System folder, and then select **Import**.
- On the **Artifact List** tab for each application, select the artifacts to import, and then click the **Import** button at the bottom right of Shared Services Console.

  The Import button is disabled for users assigned the Designer Role.

7. In the **Import** dialog box, select the application to import, and the click **Import**.

   By default, the application name from the File System (migration definition file) is displayed. The application will be created if it does not already exist.

8. View the migration status on the **Migration Status Report** tab.

   See Migration Status Report.

Setting Migration Options

You can set the import and export options for Oracle Hyperion Enterprise Performance Management System Lifecycle Management migrations. Only the options for the installed products are displayed. The options differ by product, and not all products have options. You can accept the default options without making any changes if desired.

Migration options are globally applicable for all Lifecycle Management migrations. They can be overridden by specifying the options explicitly in the migration definition file.

To set migration options:

1. Launch Oracle Hyperion Shared Services Console.

   See Launching Shared Services Console.

2. Select **Administration**, and then **Migration Options**.
3. On the **Migration Options** tab, enter the desired options for migration.

Example 6-1 Migration Import Options

Table 6-1 Import Options

Import Option	Description

Essbase Studio - Import Mode	Select an import option:
	• **Replace**—If the element already exists in the catalog database, it is overwritten with the new element from the catalog file.
	• **Merge**—If the element already exists in the catalog database, it is retained and the duplicate element in the XML file is not used. A catalog database is created using the XML file. The import process is terminated if at least one of the imported object exists in the catalog.
	• **Abort if element exists**—A catalog database is created using the XML file. The import process is terminated if at least one of the imported object exists in the catalog.
	Note: To overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="OverwriteCatalogObjects" Value="value"/>`
	For example:
	`<Options option="OverwriteCatalogObjects" Value="SKIP"/>`
	Valid values when entering directly in the migration definition file: `Replace/Merge/Abort if element exists`

Essbase Application - Overwrite Artifacts	If Yes, Overwrites all artifacts in the destination location. The default value is No.
	Note: To overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="overWriteArtifact" Value="value"/>`
	For example:
	`<Options option="overWriteArtifact" Value="false"/>`
	Valid values when entering directly in the migration definition file: `true/false`.

Table 6-1 (Cont.) Import Options

Import Option	Description

Essbase Application - Restructure Cube	Select an option:
	• **Retain cube data**—Retains the data in the cube when restructuring the cube outline
	• **Discard cube data**—Discards the data in the cube when restructuring the cube outline
	• **Keep only input data**—Retains only the input data when restructuring the cube outline
	• **Keep only 0 level data**—Retains only level 0 data when restructuring the cube outline
	Note: To overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="restructureCube" Value="value"/>`
	For example:
	`<Options option="restructureCube" Value="Retain cube data"/>`
	Valid values when entering directly in the migration definition file: `Retain cube data/Discard cube data/Keep only input data/Keep only 0 level data`.

FDMEE - Skip Validation	Skips the validation of target dimension members in the destination location during import.
	Note: overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="skipValidation" Value="value"/>`
	For example:
	`<Options option="skipValidation" Value="true"/>`
	Valid values when entering directly in the migration definition file: `true/false`.

Table 6-1 (Cont.) Import Options

Import Option	Description

Financial Close Management - Import Mode	Select an option:
	• **Replace**—Overwrites a selected artifact with an imported artifact
	• **Replace All**—Overwrites all the existing artifacts with the imported artifacts
	Note: To overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="replaceOption" Value="value"/>`
	For example:
	`<Options option="replaceOption" Value="Replace"/>`
	Valid values when entering directly in the migration definition file: `Replace/Replace All`.

HFM - Dimension Import Mode	Select an import operation:
	• **Replace**—Overwrites the artifacts with the imported artifacts
	• **Merge**—Merges the artifacts with the imported artifacts
	Note: This option is applicable to all dimensions defined in a migration.
	Note: To overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="ImportDimensionMode" Value="value"/>`
	For example:
	`<Options option="ImportDimensionMode" Value="Merge"/>`
	Valid values when entering directly in the migration definition file: `Replace/Merge`.

Table 6-1 (Cont.) Import Options

Import Option	Description
HFM - Phased Submission Assignment Import Mode	Select an import operation: • **Replace**—Overwrites the artifacts with the imported artifacts • **Merge**—Merges the artifacts with the imported artifacts **Note:** `<Options option="ImportPhaseSubmissionAssignmentMode" Value="value"/>` For example: `<Options option="ImportPhaseSubmissionAssignmentMode" Value="Replace"/>` Valid values when entering directly in the migration definition file: `Replace/Merge`.

Shared Services - Max Errors Threshold	Number of errors allowed before the import process is stopped.
	Note: To overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="maxerrors" Value="value"/>`
	For example:
	`<Options option="maxerrors" Value="100"/>`
	Valid values when entering directly in the migration definition file: `10/50/100/500/1000/5000/>5000`.

Table 6-1 (Cont.) Import Options

Import Option	Description

Shared Services - Import Mode	Select an import operation:
	• Create or Update
	• Create
	• Update
	• Delete
	Notes:
	• To delete a deactivated Native Directory user, the user must be activated first before it can be deleted.
	• To overwrite the value specified in the Migration Options dialog box, enter the following directly in the migration definition file:
	`<Options option="operation" Value="value"/>`
	For example:
	`<Options option="operation" Value="Delete"/>`
	Valid values when entering directly in the migration definition file: `Create or Update/Create/Update/Delete`.

Example 6-2 Sample Migration Definition File With Migration Options

Following is a sample migration definition file with the migration Options row shown in bold.

```
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="admin" password="" />
   <Task>
      <Source type="Application" product="HUB" project="Foundation"
application="Shared Services" />
      <Target type="FileSystem" filePath="/exp1/HUB.Shared Services" />
      <Options option="operation" Value="delete" />
      <Artifact recursive="true" parentPath="/Native Directory"
pattern="*" />
      <Artifact recursive="true" parentPath="/Taskflows" pattern="*" />
   </Task>
   <Task>
      <Source type="FileSystem" filePath="/exp22/HUB.Shared Services" />
      <Target type="Application" product="HUB" project="Foundation"
application="Shared Services" />
      <Artifact recursive="true" parentPath="/Native Directory"
pattern="*" />
      <Artifact recursive="true" parentPath="/Taskflows" pattern="*" />
   </Task>
</Package>
```

Export

Enter the **File System Folder** where the artifacts will be exported and click **Export**.

A default file system folder name is displayed in the format of `username DD-MM-YY Hour_Min`; for example, `admin 03-01-12 09_32`. You can either accept the default or enter a different file system folder name.

Note that Oracle Hyperion Enterprise Performance Management System Lifecycle Management does not allow characters in a folder name that are not supported by the native operating system. For example, Windows does not allow colons in a folder name, and so neither does Lifecycle Management.

All the applications and artifacts selected are exported to the specified file system folder. (You do not need to specify different file system folders if you have more than one application.)

If you specify a file system folder name that already exists on the file system, you will be prompted to provide a new file system folder name.

Import

Select the application to import and click **Import**.

By default, the application name from the File System (application definition or metadata XML file) is displayed. The application will be created if it does not already exist.

Import

Click **OK** to proceed with the import. When you click **OK**, all the applications in the selected folder under the File System node or the individual application selected under the file system folder are imported.

Rename Folder

Enter a new folder name and click **OK**.

Note that Oracle Hyperion Enterprise Performance Management System Lifecycle Management does not allow characters in a folder name that are not supported by the native operating system. For example, Windows does not allow colons in a folder name, and so neither does Lifecycle Management.

If you specify a folder name that already exists on the file system, you will be prompted to provide a new folder name.

Upload

Click **Browse**, select the file to upload, and click **Finish**.

Modified Since

This screen lists the artifacts that have been modified since the date listed at the top of the screen. To export the artifacts, click the check box next to the artifact and click **Export**.

Exporting and Importing Individual Artifacts for Editing

Oracle Hyperion Shared Services Console enables you to export individual artifacts to the file system, edit them, and import them back again after editing. Artifacts must be imported back into the same application from which they were exported.

> **Note:**
>
> Not all artifacts are editable on the file system. See Editing Individual Artifacts.

Exporting Individual Artifacts for Editing

To export individual artifacts using Oracle Hyperion Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. Expand the **Application Groups** node in the View pane to view application groups.
3. Expand an application group to view applications.
4. Select an application to view the artifact listing (or right-click the application and select **Explore**).
5. Right-click the artifact to export and select **Export for Edit**.
6. In **File Download**, click **Save**.
7. Enter the save location on the local file system, and then click **Save**.

Editing Individual Artifacts

Because artifacts are individual application or repository items (for example, scripts, web and data forms, rules files, documents, financial reports, and so forth), the editing method differs depending on the type of artifact. Some artifacts can be edited using a text editor, and others may need to be edited within the product. For example, Oracle Hyperion Calculation Manager artifacts are XML-based and can be edited using a text editor.

Review the artifact listings in the appendixes at the end of this guide to determine whether an artifact is editable on the file system.

> **Caution:**
>
> Do not rename the files exported for edit, or the import will fail.

Importing Individual Artifacts After Editing

Artifacts must be imported back into the same application from which they were exported. Artifacts must also use the same file name that was used during export.

To import individual artifacts using Oracle Hyperion Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. Expand the **Application Groups** node in the View pane to view application groups.
3. Expand an application group to view applications.
4. Select an application to view the artifact listing (or right-click the application and select **Explore**).
5. Right-click any artifact within the application and select **Import after Edit**.
6. In **Load Artifact**, enter the local file system location where the artifact is saved, and then click **Finish**.

Downloading and Uploading Application Artifacts

You can move application artifacts from one environment to another by downloading the artifacts from the File System node in Oracle Hyperion Shared Services Console. When you download Oracle Hyperion Enterprise Performance Management System Lifecycle Management artifacts, they are saved in a ZIP file. You can then upload the ZIP file containing the artifacts to another environment.

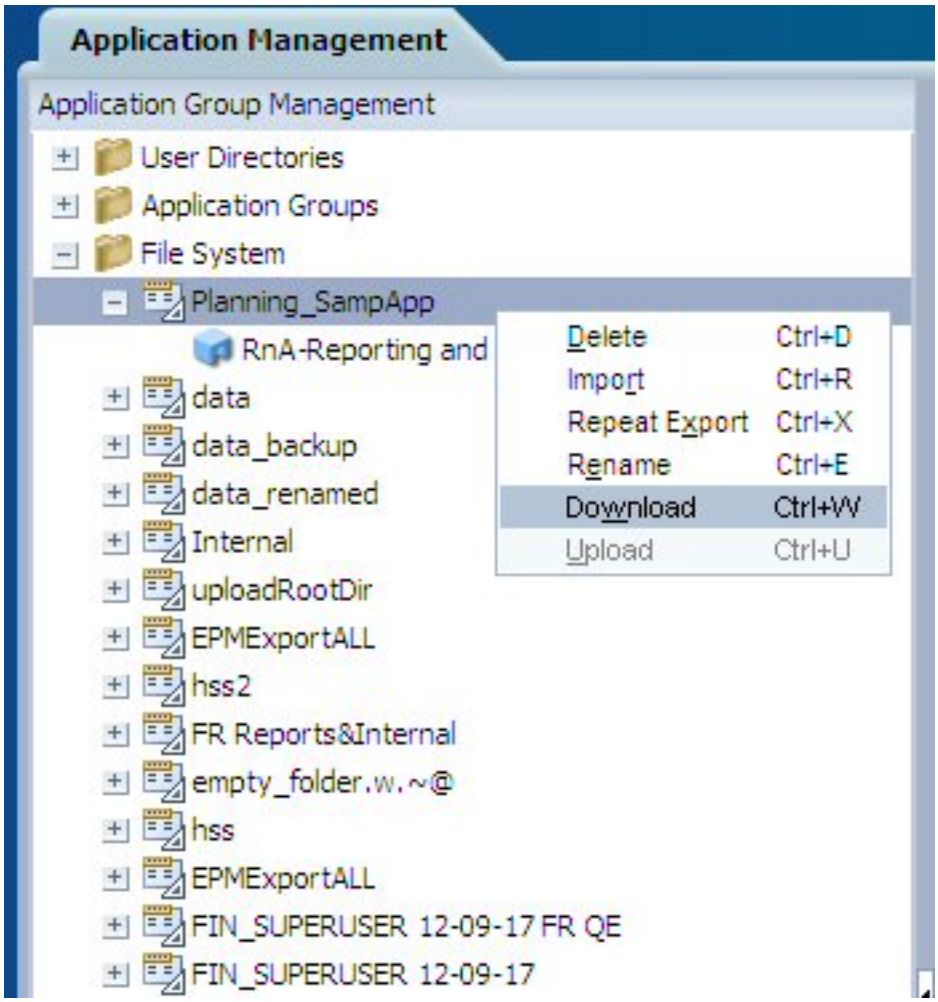
Steps to Download and Upload Application Artifacts

To download and upload application artifacts:

1. In your existing environment, launch Oracle Hyperion Shared Services Console.

   See Launching Shared Services Console.
2. Expand the **File System** node in the View pane.
3. Right-click a **File System** folder and select **Download**.

   The Download option is available only if the file system folder is a ZIP file on the server. The file system folder is compressed by Oracle Hyperion Enterprise Performance Management System Lifecycle Management during the export operation only if the folder size is less than or equal to 2 GB. For content greater than 2 GB, you must use a mechanism such as FTP to move the content from one environment to another.



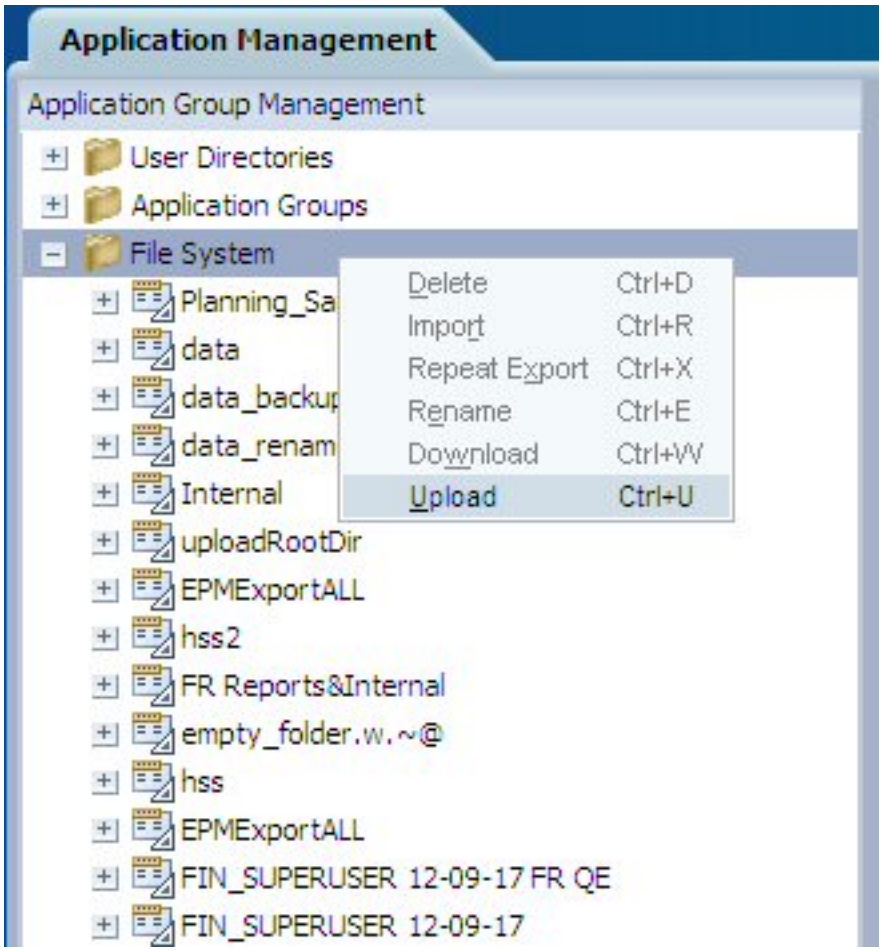
4. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.

   The entire contents of the ZIP file is downloaded as one file.

5. In your new environment, launch Shared Services Console, and then expand the **File System** node.

6. Right-click the **File System** node, select **Upload**, and select the ZIP file to upload.

   If the ZIP file already exists, the upload is aborted. You can rename the ZIP file before uploading if desired.



Important Points About ZIP Files and Archiving

- You must use a file compression software such as 7-Zip to extract downloaded content or to upload a compressed LCM folder to the server.
- Uploading a ZIP file greater than 2 GB is not supported.
- When you archive a dataset, you must preserve the Unicode paths and file names.

  To do this using 7-Zip:

  1. Right click the **File System** folder and select **7-zip**, and then **Add to Archive**.
  2. In the **Add to Archive** dialog box, set the following information:
     - In the **Archive Format** field, select **Zip**.
     - In the **Parameters** field, enter **cu=on**.
  3. Click **OK**.

> **Note:**
>
> If the UTF encoding is not preserved, and if the data set contains characters that need these encodings, the migration results in errors.

Migrating Native Directory (Security)

You can migrate artifacts (assigned roles, groups, roles, and users) in the same way that you migrate application artifacts.

Oracle Hyperion Shared Services artifacts are listed in the Shared Services node under the Foundation application group.

> **Note:**
>
> Product application security artifacts (for example, Oracle Hyperion Financial Management security classes or Oracle Essbase filters) are listed separately under the product application groups.
>
> For a listing of application security artifacts by product, see the appendixes at the end of this guide.

To migrate Shared Services (Security) artifacts using Oracle Hyperion Shared Services Console:

1. Back up the destination environment.
2. Launch Shared Services Console.

   See Launching Shared Services Console.
3. On the View pane, from the **Application Groups** node, expand the **Foundation** application group.
4. Select **Shared Services** (or right-click **Shared Services** and select **Explore**).
5. Expand **Native Directory** and select the following artifacts:
   - **Assigned Roles**

     Expand Assigned Roles and select the artifacts to migrate. The artifacts are typically named after the application name.
   - **Delegated Lists**
   - **Groups**
   - **Roles**
   - **Users**
6. Expand **Assigned Roles** and select the assigned roles for the application that you are migrating.
7. Select **Export**.
8. In the **Export** dialog box, enter the **File System Folder** where the artifacts will be exported, and then click **Export**.
9. View the migration status on the **Migration Status Report** tab.

Editing Shared Services Registry Data

Oracle Hyperion Shared Services Registry is part of the database that you configure for Oracle Hyperion Shared Services. (It shares the tablespace with the Shared Services database.)

> **Note:**
>
> In previous releases, Shared Services Registry was sometimes referred to as EPM System Registry.

Created the first time you configure Oracle Enterprise Performance Management System products, Shared Services Registry simplifies configuration by storing and reusing the following information for most EPM System products that you install:

- Initial configuration values such as installation directories, database settings, and deployment settings
- The computer names, ports, servers, and URLs that you use to implement multiple integrated EPM System products and components
- Dependent service data

Oracle Hyperion Enterprise Performance Management System Lifecycle Management provides a user interface that enables users to view registry content and export registry data to the file system, where it can be edited and reimported.

Users performing Lifecycle Management operations for deployment metadata must be assigned both the LCM Administrator and Shared Services Administrator roles.

> **Caution:**
>
> The Shared Services Registry artifacts are available as part of Lifecycle Management for editing configuration information on a given environment only. Do not use Lifecycle Management to migrate Shared Services Registry data from one environment to another.

Lifecycle Management helps you define Shared Services Registry artifacts to export. Oracle Hyperion Shared Services Console also enables you to export individual registry artifacts to the file system, edit them, and import them back in after editing.

You can view all Shared Services Registry artifacts in the Shared Services Console under the Deployment Metadata node in the Foundation application group:

- All nodes (as per the registry taxonomy) are directories in Lifecycle Management.
- All attributes of a node are artifacts in Lifecycle Management.
- For attributes that are files (for instance, XML files), there is an artifact for the corresponding file type.

- All named value pair attributes for a node (component or product) are grouped into one artifact. This artifact is a file that contains all these attributes and gets copied when an Lifecycle Management export is performed.

For a listing of Shared Services Registry artifacts and Shared Services Registry migration options, see Deployment Metadata and Lifecycle Management.

Viewing Shared Services Registry Data

To view Shared Services Registry data using Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. From the **Application Groups** node in the View pane, expand the **Foundation** application group.
3. Select **Deployment Metadata** (or right-click **Deployment Metadata** and select **Explore**).
4. Select **Shared Services Registry**.

Exporting Shared Services Registry Data

> **Caution:**
>
> The Shared Services Registry artifacts are available as part of Lifecycle Management for editing configuration information on a given environment only. Do not use Lifecycle Management to migrate Shared Services Registry data from one environment to another.

To export Shared Services Registry data using Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. From the **Application Groups** node in the View pane, expand the **Foundation** application group.
3. Select **Deployment Metadata** (or right-click **Deployment Metadata** and select **Explore**).
4. Expand **Shared Services Registry**.
5. Select the Shared Services Registry artifacts to export.

   To select an individual artifact, click the checkbox next to the artifact. To select all the artifacts, click **Select All**.
6. Select **Export**.
7. In the **Export** dialog box, enter the **File System Folder** where the artifacts will be exported and click **Export**.
8. View the migration status on the **Migration Status Report** tab.

Editing Shared Services Registry Data

To edit Shared Services Registry data on the file system:

1. Navigate to the file system location where the Shared Services Registry data was copied or exported.
2. Edit the data.
3. Save the changes.

Importing Shared Services Registry Data

To import Shared Services Registry data using Shared Services Console:

1. Launch Shared Services Console.

   See Launching Shared Services Console.
2. From the **File System** node in the View pane, right-click the File System folder specified during export, and then select **Import**.

Editing Migration Properties

Oracle Hyperion Enterprise Performance Management System Lifecycle Management uses migration properties to set the global parameters for migrations.

To modify the migration properties:

1. Launch Oracle Hyperion Shared Services Console.

   See Launching Shared Services Console.
2. On the View pane, expand the **Application Groups** node.
3. Under **Application Groups**, expand **Foundation**, and then **Deployment Metadata**.
4. On the **Artifact List** tab, expand **Shared Services Registry**, then **Foundation Services**, and then **Shared Services**.
5. Select the **Properties** artifact; then, right-click and select **Export for Edit**.
6. In the **File Download** dialog box, save the Properties artifact to the desired location.
7. Edit the migration properties as desired.
8. Return to Lifecycle Management, right-click the **Properties** artifact used in Step 5, and select **Import after Edit**.
9. In the **Import after Edit** dialog box, point to the file system where the edited Properties artifact is available.
10. Restart Oracle Hyperion Shared Services.

Table 6-2 Migration Properties and Their Descriptions

Property	Description
`double-encoding`	Allows Base64 encoding on top of UTF-8 encoding in Oracle Hyperion Financial Management application migrations. This property is not supported if you are performing Financial Management migrations in a mixed-release environment (for example, using a previous release of Financial Management with this release of Shared Services). If you are performing a Financial Management application migration in a mixed-release environment, set this property to `false`. **Default value:** `true`
`filesystem.artifact.path`	Location of the directory where the exported applications are to be stored. This is the shared disk location if Shared Services is configured for high availability. To customize this parameter, uncomment this line and add a path location. **Default value:** This parameter is commented out and the Lifecycle Management engine uses the default file system location on the Shared Services computer; for example, *`MIDDLEWARE_HOME`*`/user_projects/epmsystem1/import_export`. Note: To enable data migration across distributed environments, `filesystem.artifact.path` must be a shared path; for example, `//servername/shared`.
`groupcount`	Number of artifacts that are migrated in a group. This option is available for products that support migration in groups (Oracle Hyperion Planning, Financial Management, Oracle Hyperion Financial Close Management, and Oracle Hyperion Financial Data Quality Management, Enterprise Edition). Financial Close Management artifacts are always migrated in one group regardless of the size and count of the artifacts. The default group count is 30. This means that artifacts are migrated in groups of 30. Based on data regarding types of artifacts, size of artifacts, and number of artifacts, this value can be changed to improve migration performance. **Default value:** `-1`
`MSR.PURGE.EARLIERTO.DAYS`	Administrative setting relating to Lifecycle Management migrations. Any migrations older than this value are periodically purged when the Oracle Hyperion Foundation Services system is started, with the check running every 24 hours. **Default value:** `30 days`

Table 6-2 (Cont.) Migration Properties and Their Descriptions

Property	Description
`report.folder_path`	Directory where the migration status and artifact estimation reports are stored. **Default value:** `../reports` (*MIDDLEWARE_HOME*`/user_projects/epmsystem1/diagnostics/logs/migration/reports`)
`zip.threshold`	Maximum ZIP file threshold size. If the size of export content exceeds this threshold, then the exported content is stored as a folder. This size should not exceed 1.8 GB. Any size bigger than this has browser and JDK limitations for ZIPand download. **Default value:** `1.8 GB`

Purging Migration Data

Purge activity is a background process that starts when the Oracle Hyperion Shared Services web application starts. The purge happens at the time period specified in the migration property `MSR.PURGE.EARLIERTO.DAYS`. The default value is 30 days. See Editing Migration Properties.

Lifecycle Management Reports

> **Note:**
>
> In addition to the reports discussed in this section, Oracle Hyperion Shared Services also generates provisioning reports, security reports, and configuration reports. These reports are described in the *Oracle Enterprise Performance Management System User Security Administration Guide* .

Migration Status Report

LCM Administrators can view a Migration Status report for the status of all migrations:

- **In Progress**—Migration in progress
- **Completed**—All artifacts were successfully migrated
- **Completed with Warning**—All artifacts were successfully migrated; however, there are issues that you may want to investigate.
- **Failed**—Some artifacts were not migrated.

> **Note:**
>
> For migrations with a status of Complete with Warning or Failed, click the status to view migration details. Migration details are not available for In Progress or Completed migrations.

To view migration status:

1. Launch Oracle Hyperion Shared Services Console.

   See Launching Shared Services Console.
2. From **Administration**, select **Migration Status Report**.

   You can view the following information about each migration:

   - User
   - Source
   - Destination
   - Start Time
   - Completed Time
   - Duration
   - Status—In Progress, Completed, Completed with Warning, or Failed

   > **Note:**
   >
   > A progress indicator in the Source-Destination column provides the number of artifacts processed for In Progress migrations.
3. If a migration has a status of **Completed with Warning** or **Failed**, you can view the following migration details by clicking the hyperlink in the **Status** column:

   - Source and Destination Applications
   - Artifact Path
   - Artifact Name
   - Message Type (Error or Warning)
   - Message
4. To regenerate the Migration Status Report, click **Refresh**.
5. To close the Migration Status Report, click **Cancel**.

Application Audit Report

The Application Audit report presents information about artifacts that were imported or exported using Oracle Hyperion Enterprise Performance Management System Lifecycle Management functionality. Only a Shared Services Administrator can generate and view audit reports. An LCM Administrator cannot perform audit tasks.

Auditing must be enabled before you can generate audit reports. To enable auditing, launch Shared Services Console and select **Administration**, then **Configure Auditing**, and then select the **Enable Auditing** check box.

If auditing is enabled, audit reports can be generated at the application level or at the application group level. Every action taken within Lifecycle Management is logged to the Application Audit report, which tracks what artifacts were migrated, when they were migrated, and by whom. This report is exportable to an external file.

To generate the Application Audit report:

1. Launch Shared Services Console.

   See Launching Shared Services Console.

2. From **Administration**, select **Audit Reports**, and then select **Application Audit Reports**.

   The **Application Audit Report** is displayed.

3. Enter report parameters:

   - **Performed By**—Select the users for which the report is to be generated or select all users.
   - **Performed During**—Select the period for which the report is to be generated.
     - **5 Days**—Events within the last 5 days
     - **10 Days**—Events within the last 10 days
     - **15 Days**—Events within the last 15 days
     - **20 Days**—Events within the last 20 days
     - **25 Days**—Events within the last 25 days
     - **30 Days**—Events within the last 30 days
     - **Date Range**—Events within a specified date range (inclusive).

4. To view the report, click **View Report**.
5. To view or save the report in a CSV file format, click **Export**.
6. To close the report, click **Close**.

Artifact Change Report

The Artifact Change report identifies changes made to artifacts in Oracle Enterprise Performance Management System. The report shows the application group, application, artifact name, artifact type, modified user, modified date, and artifact path. When creating the Artifact Change report, you can filter the results based on artifact name, artifact type, modified user, or start and end date attributes.

To generate the Artifact Change report:

1. Launch Shared Services Console.

   See Launching Shared Services Console.

2. From **Administration**, select **Artifact Change Report**.
3. Enter report parameters:

- **Artifact Name**—Name of the artifact. You can enter a specific artifact name, or you can enter part of the name. For example, you could enter `Cost*` to search for all data forms starting with `Cost`.

  This is an optional parameter. If you do not enter an artifact name, all artifacts will be included.
- **Artifact Type**—Type of artifact.

  This is an optional parameter. If you do not enter an artifact type, all artifact types will be included.
- **Modified By**—The user ID of the person who modified the artifact.

  This is an optional parameter. If you do not enter a user ID, all users who modified artifact will be included.
- **Start Date**—Start date for the report. The default date is yesterday's date.
- **End Date**—End date for the report. The default date is today's date.

> **Tip:**
>
> You can specify different date ranges by modifying the start date and the end date. For example, you could search for artifacts that were changed in the previous two years, by setting the start date two years earlier.

4. Select the application or applications to include in the report.

   To select all the applications, select the check box next to **All**.

> **Note:**
>
> To search for a specific application, enter the name of the application in the Search Application text box. For example, if you have several applications and only want to see the Oracle Essbase applications, you could enter `Essbase` to narrow the applications that are displayed to Essbase applications only.

5. Click **Create Report**.
6. After the report is generated, select one of the following options:
   - **Back**—Return to the Artifact Change Report input screen and enter different report parameters.
   - **Print Preview**—Preview the report before you print it. After you have previewed the report, you can click **Print** to print the report.
   - **Export to CSV**—Export the report to a comma-separated value file.
   - **Close**—Exit from the Artifact Change Report.

> **Note:**
>
> For information on using the Lifecycle Management Utility to track artifact changes, see Activity Change Report.

7

Using the Lifecycle Management Utility

Related Topics

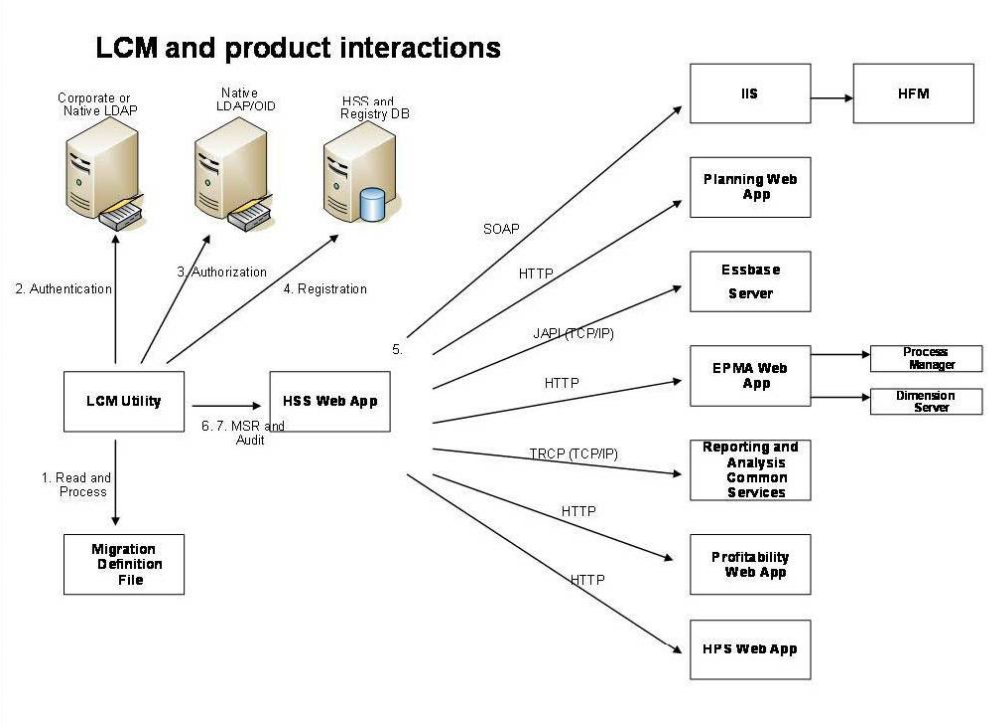
- Lifecycle Management Utility Process
- Lifecycle Management Utility Features
- Installing the Lifecycle Management Utility
- Working with Migration Definitions
- Using the Lifecycle Management Utility
- Additional Command-Line Utilities

Lifecycle Management Utility Process

The Lifecycle Management Utility is a command-line utility that supports the migration of artifacts across product environments and operating systems. The utility provides an alternative way to migrate entire applications, or individual artifacts, from source to destination.

The following illustration depicts the communication flow between services and the Lifecycle Management Utility:

Figure 7-1 Lifecycle Management and Product Interactions



1. **Process Migration Definition File:** The Lifecycle Management Utility first reads and processes the migration definition file.
2. **Authenticate:** The Lifecycle Management Utility then authenticates the user with the corporate LDAP directory or another provider configured for use with Oracle Hyperion Shared Services. The Oracle Hyperion Shared Services Registry database must be running during initialization.
3. **Authorize:** After authentication, the Lifecycle Management Utility contacts Shared Services to ensure that the user's role authorizes them to perform the requested operation.
4. **Registration Information:** The Lifecycle Management Utility communicates with Shared Services Registry and the Shared Services database to obtain Oracle Enterprise Performance Management System application registration information.
5. **Process each application migration request:** The Lifecycle Management Utility processes each import or export operation by contacting the appropriate EPM System application.
6. **Audit:** The Lifecycle Management Utility audits each Oracle Hyperion Enterprise Performance Management System Lifecycle Management action, if auditing is enabled, by contacting the Shared Services Java web application over HTTP.
7. **Publish status report:** The Lifecycle Management Utility contacts the Shared Services Java web application over HTTP to publish the migration status report.

Lifecycle Management Utility Features

- Migrates one or more Oracle Enterprise Performance Management System applications or application artifacts from one environment to another
- Enables users to perform scheduled migrations using a third-party scheduling service such as Windows Task Scheduler or Oracle Enterprise Manager
- Ensures secure access to the utility

  Only users assigned the LCM Administrator role can perform Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations.
- Supports migration of internationalized data
- Logs errors to facilitate troubleshooting

> **Note:**
>
> For Lifecycle Management Utility requirements, see Lifecycle Management Requirements.

Installing the Lifecycle Management Utility

The Lifecycle Management Utility is installed with Oracle Hyperion Shared Services. The components of the utility are installed to *EPM_ORACLE_HOME*/common/utilities/LCM/11.1.2.0. Note that although the components are installed here, you must run the utility from *MIDDLEWARE_HOME*/user_projects/epmsystem1/bin.

Working with Migration Definitions

Creating Migration Definitions

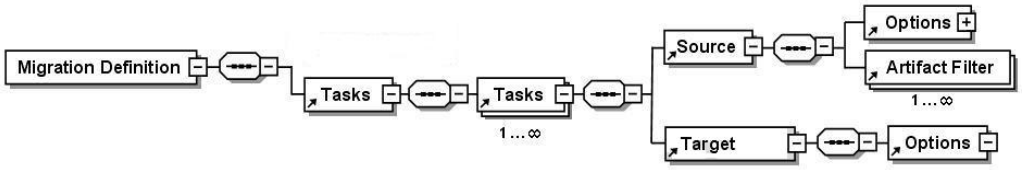
Artifacts to migrate must be defined in a migration definition. Note the following about migration definitions:

- A migration definition is created in Oracle Hyperion Shared Services Console when you perform an export or import operation.
- When you export artifacts, Oracle Hyperion Enterprise Performance Management System Lifecycle Management creates two XML files, one for export and one for import. These XML files can be used for the migration definition file in the Lifecycle Management Utility.
- When you perform an export operation, the MDF file for that export and for the corresponding import is automatically created in the File System folder under the root folder.

Migration Definition File XML Schema

The following illustration depicts an XML schema outline of the migration definition.

Figure 7-2 XML Schema Outline of the Migration Definition File



Migration Definition File Elements

This section describes the elements and attributes used in the XML schema for migration definition files.

Locale

Defines the server locale at the time the migration definition file is created. All error messages and console messages are included in this locale.

User and Password

Defines the user name and encrypted password of the user who will be executing the migration definition file.

Task

Defines the tasks to complete during the migration. A task that is defined in the migration definition file depends on the source, the destination, and the artifacts to migrate. At a minimum, each task contains source, destination, and artifact tags.

For multiple sources and destinations, you must define at least one task for each source-destination combination. For example, extracting artifacts to the file system would be defined as task 1. Loading the artifacts from the file system to an application would be defined as task 2.

> **Note:**
>
> By default, after a failed task, the utility continues with the next task. Validation of a task's source and target connections are performed only when the task is executed and not before starting the task execution.

Task contains these elements:

- Source
- Target
- Artifact
- Options

Source

Defines the source for the migration. You must define one source and one destination per task.

Table 7-1 Source Attributes

Attribute	Description
application	Name with which the application is registered. The application name is visible in Shared Services Console. **Example**: HPAPP1
filePath	Directory where artifacts are stored on the file system. **Example:** filePath="/Essbase.Sample.Basic" **Note:** When an MDF file is generated from the UI, the path is a relative path to the working folder. If the MDF file is not in the working folder, use the -b command-line argument to use the base path relative to where the file system path is set.
product	Product code for the application that is registered with Shared Services. **Examples:** • HUB (Oracle Hyperion Shared Services) • CALC (Oracle Hyperion Calculation Manager) • ESBAPP (Oracle Essbase) • BPM (Oracle Essbase Studio) • AIF (Oracle Hyperion Financial Data Quality Management, Enterprise Edition) • HFM (Oracle Hyperion Financial Management) • FCC (Oracle Hyperion Financial Close Management) • HP (Oracle Hyperion Planning) • HPM (Oracle Hyperion Profitability and Cost Management)
project	Name of the Shared Services Application Group to which the application belongs. The project name is visible in Shared Services Console. **Example:** DevPlan_Proj
type	Connection types: • FileSystem for the file system connection • Application for the application connection registered with Shared Services

Target

Defines the destination for the migration. You must define one destination per task.

Table 7-2 Target Attributes

Attribute	Description
application	Name with which the application is registered. The application name is visible in Shared Services Console. **Example**: HPAPP1

Table 7-2 (Cont.) Target Attributes

Attribute	Description
filePath	Directory where artifacts are stored on the file system. **Example:** filePath="/Essbase.Sample.Basic" **Note:** When an MDF file is generated from the UI, the path is a relative path to the working folder. If the .MDF file is not in the working folder, use the -b command-line argument to use the base path relative to where the file system path is set.
product	Product code for the application that is registered with Shared Services. **Examples:** • HUB (Shared Services) • ESBAPP (Essbase) • HFM (Financial Management) • HP (Planning) • CALC (Calculation Manager) • HPM (Profitability and Cost Management)
project	Name of the Shared Services Application Group to which the application belongs. The project name is visible in Shared Services Console. **Example:** DevHP_Proj

Artifact

Filter used for the current migration.

Table 7-3 Artifact Attributes

Attribute	Description
parentPath	Top-level directory where artifact or data for the migration is stored. See the appendixes at the end of this guide for information on product directory structures. **Example:** /Data Analysis & Report Creation **Caution:** If the parent path directory contains an ampersand (&) character, replace it with "&" in the migration definition file (see example below). **Notes:** If recursive="true" , all artifacts contained in the subdirectories within this directory are imported. The pattern attribute is required for all products.

Table 7-3 (Cont.) Artifact Attributes

Attribute	Description
`pattern`	Artifact-selection criteria. Specify the name of an artifact to import or use an * (asterisk) to import all artifacts that match filter conditions. **Example: *** **Note:** The `pattern` attribute is required for all products.
`recursive`	Whether the migration should be performed on artifacts stored in subdirectories. **Example:** `true` **Note:** The `recursive` attribute is optional.

Options

Options are product-specific. Refer to the appendixes at the end of this guide for the import and export options that you can set. The source or destination interprets the options to understand the artifacts being migrated.

If options are not set, the default options set in Oracle Hyperion Shared Services Registry are used.

Table 7-4 Options Attributes

Attribute	Description
`option`	Name used to override the option name defined in Shared Services Registry. **Example:** `ExportJobOutput`
`value`	Value used to override the option value defined in Shared Services Registry. **Example:** `true`

Sample Migration Definition File

Following is a sample migration definition file. Any change in the structure or syntax result in errors during migration.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package>
<LOCALE>en_US</LOCALE>
<User name="admin" password=""/>
   <Task>
      <Source type="Application" product="HUB" project="Foundation"
application="Shared Services"/>
      <Target type="FileSystem" filePath="/folder/HUB.Shared Services" />
      <Options option="GroupFilter" Value= "*" />
      <Artifact recursive="true" parentPath="/Native Directory" pattern="*"/>
      <Artifact recursive="true" parentPath="/Taskflows" pattern="*"/>
   </Task>
   <Task>
```

```
      <Source type="FileSystem" filePath="/folder/HUB.Shared
Services" />
      <Target type="Application" product="HUB" project="Foundation"
application="Shared Services" />
      <Artifact recursive="true" parentPath="/Native Directory"
pattern="*"/>
      <Artifact recursive="true" parentPath="/Taskflows" pattern="*"/>
       </Task>
</Package>
```

Using the Lifecycle Management Utility

Overview

The Lifecycle Management Utility offers the following options:

- Migrates artifacts to or from a file system
- Lists the artifacts modified since the last exported time
- Lists the artifacts modified in the exported content
- Lists what has changed in an Oracle Enterprise Performance Management System environment

> **Note:**
>
> Errors encountered during migration are defined by `logging.xml` in the *MIDDLEWARE_HOME*`/user_projects/epmsystem1/Config/FoundationServices` directory and the `log.directory` property. Monitor the error log to understand issues encountered during the migration process.

Before Starting Migrations

Before starting migration using the Lifecycle Management Utility, do the following:

- Verify that Oracle Hyperion Shared Services is running.
- Back up the destination environment.
- Create the migration definition.
- **Optional:** Modify the property file to use for the migration.

Running the Lifecycle Management Utility

To run the utility:

1. If migrating, back up the destination environment.
2. Open a command prompt window.
3. Change the directory to the location of `Utility.bat` ; for example, *MIDDLEWARE_HOME*`/user_projects/epmsystem1/bin`.
4. Execute the utility by entering the following text at the command prompt:

   ```
   Utility.bat c:/lcm/lcmdefinition.xml
   ```

where `c:/lcm/lcmdefinition.xml` is the location of the migration definition file

Running the Lifecycle Management Utility from a Non-Foundation Services Machine

In EPM System, apart from the machine where Oracle Hyperion Foundation Services is configured, migrations using the Lifecycle Management Utility can only be run from a machine where EPM System products are configured as part of a distributed EPM System configuration. Migrations using the utility cannot be run from standalone client machines that do not have any EPM System products installed.

To run the Lifecycle Management Utility from a non-Foundation Services machine:

1. Copy `Utility.bat` (Windows) from *`EPM_ORACLE_HOME`*`/common/utilities/LCM/11.1.2.0/bin` to *`MIDDLEWARE_HOME`*`/user_projects/epmsystem1/bin`.
2. Navigate to *`MIDDLEWARE_HOME`*`/user_projects/epmsystem1/bin` and execute `Utility.bat .`

Command-line Arguments

[-b]: Specifies the Base Path

The `[-b]` argument instructs the Lifecycle Management Utility to use the base path relative to where the file system path is set (the file system is the location where all exports and imports are stored).

```
utility.bat c:/lcm/lcmdefinition.xml [-b path]
```

The path that is specified can be absolute or relative to the current working directory (it can also include " . " and " . . " relative to an absolute path). If no base path is specified, it uses the directory location of the MDF file (which is not necessarily the directory where the utility exists).

The following are some examples:

```
utility.bat c:\import_export\HPFullApplicationSuite\Import.xml
```

```
utility.bat c:\import.xml -b
c:\Oracle\Middleware\user_projects\epmsystem1\import_export\HPFullApplicationSuite
```

> **Note:**
>
> If the specified path does not exist, Oracle Hyperion Enterprise Performance Management System Lifecycle Management will display an error.

Following are some examples that specify an MDF file residing inside exported content:

```
utility.bat
c:\Oracle\Middleware\user_projects\epmsystem1\import_export\SS1.zip\Export.xml
```

```
utility.bat
c:\Oracle\Middleware\user_projects\epmsystem1\import_export\SS1.zip\HSS-Shared Services\Import.xml
```

[-ls]: Lists EPM System Contents

The `[-ls]` argument lists the artifacts in a migration defined by a migration definition file. It lists the artifacts of both the source and the target system. In an export MDF, for example, the source is the Oracle Enterprise Performance Management System application and the target is the file system.

```
utility.bat importMDF.xml -ls
```

```
utility.bat exportMDF.xml -ls
```

The resulting output is two files; one for the source and one for the destination:

- *<mdf name>_application name*.txt
- *<mdf name>_file system folder name*.txt

You can compare the output using a third-party, file-compare utility. This helps to determine the success of the migration.

Output file details:

- Artifact names
- Artifact types
- Path
- Summary of the content summary

  Sample content summary:

```
CONNECTION NAME = AppConnection2
CONNECTION TYPE = Application

APPLICATION RESOURCE DETAILS -
APPLICATION ID - 1111
PRODUCT NAME - Hyperion Shared Services
PRODUCT CODE - HUB
PRODUCT VERSION - 11.x.x.x
PROJECT NAME - Foundation

TOTAL ARTIFACT: 48
Aggregated Roles      1     (artifact count by type)
Assigned Roles        15
Groups                1
Process Definition    15
Taskflow ACL          15
Users                 1
```

The output files are created in the same path as the MDF file and replace any existing files with the same names. You can specify a path for the output files as follows:

```
utility.sh c:\importMDF.xml -ls -p c:\compare\
```

For MDF files with multiple tasks, different sets of list structures are created for each task, and the files are prefixed with the task number:

- *<mdf name>_application name_<tasknumber>*.txt

- *<mdf name>_file system folder name_<tasknumber>*.txt

`-ls -ms` lists the artifacts which were modified since the last exported time. `ls -lmu "username"` lists all the artifacts modified by the user in the exported content.

[-ls -ms]: Lists Artifacts Modified Since the Last Exported Time

The `[-ls -ms]` argument lists artifacts that have been modified in the system since the last migration defined by a migration definition file. These artifacts are listed in Oracle Hyperion Shared Services Console.

For an export MDF file (source = application, target = file system content), `[-ls -ms]` lists the artifacts whose last modified dates are different in the application from the dates of the artifacts in the file system content.

For an import MDF (source = file system content, target = application), `[-ls -ms]` lists the artifacts whose last modified dates are different in the file system from the dates of the artifacts in the application.

> **Note:**
>
> If the modified date for an artifact is not available, the artifact is listed.

```
utility.bat c:\exportMDF.xml -ls -ms
```

Output Format in Console:

```
Artifact Type Artifact Last Modified Date
```

[-ls -lmu *username*]: Lists Artifacts Modified by a User in the Exported Content

The `[-ls -lmu]` argument lists the artifacts modified by a specific user.

For an export MDF file (source = application , target = file system content), the utility matches the modified by name with the artifacts in the file system listing.

For an import MDF (source = file system content, target = application), the Lifecycle Management Utility matches the modified by name with the artifacts in the product listing.

```
utility.bat c:\exportMDF.xml -ls -lmu "user"
```

Output Format in Console:

```
Artifact Type Artifact Modified By
```

> **Note:**
>
> If you do not specify a user name, an error is displayed. The user name must be enclosed in quotation marks.

Additional Command-Line Utilities

Activity Change Report

The Activity Change Report Utility generates a report that tracks what artifacts have changed functionally in a Oracle Enterprise Performance Management System environment for a specific time period or a specific application.

`acr.bat input.properties -<number of days> -app<application name>`

Parameters:

- `input.properties`: A properties file with the user name and password. The content of `input.properties` is:

  ```
  User=admin
  Password=password
  ```

- `-d`: Number of days. Values are:
  - -X = Fewer than *x* number of days

    For example, -1 generates the report for artifacts changed in the last day.
  - +X = More than *x* number of days

    For example, +3 generates the report for artifacts changed more than 3 days ago.
- `-app`: Application name
  - *Application Display Name* = Only this application
  - * or ALL = All applications.

The output from the `[-acr]` command is generated in the Oracle Hyperion Enterprise Performance Management System Lifecycle Management default file system location in a folder named `Reports`. The name of the report is in the format of `acr_mm_dd_yyyy_hh_mm_ss.html`.

> **Note:**
>
> For information on using Oracle Hyperion Shared Services Console to track changes to artifacts in an EPM System enviornment, see Artifact Change Report.

EPMExportAll

The `EPMExportAll` Utility clones all the applications in an environment.

When using `EPMExportAll`, keep in mind the following:

- All applications are exported under a single folder.
- Only applications that are LCM-enabled are exported.

- You can automate this task to be used as a backup or a snapshot of the environment.

`EPMExportAll` takes a properties file (`input.properties`) as input. The `input.properties` file contains the user name and password.

For example:

```
user=admin
password=password
```

EPMImportAll

The `EPMImportAll` Utility imports all the applications cloned in `EPMExportAll` into another environment.

When using `EPMImportAll`, consider the following:

- You can only execute `EPMImportAll` in an environment where there are no applications for Oracle Hyperion Planning, Oracle Hyperion Financial Management, and Oracle Hyperion Profitability and Cost Management.
- You must copy the cloned export content in the `EPMExportAll` folder from the source environment to the target environment in the same File System folder location.
- By default `EPMImportAll` uses the `import.xml` from the `EPMExportAll` folder to execute the import.

`EPMImportAll` takes a properties file (`input.properties`) as input. The `input.properties` file contains the user name and password.

For example:

```
user=admin
password=password
```

A

Deployment Metadata and Lifecycle Management

About Deployment Metadata Artifacts

Deployment metadata artifacts contain physical server names and configuration information for the deployment. This information should not be migrated from one environment to another (for example, from Dev to Test). Migrating this data will corrupt the configuration information on the destination environment and will make the system unusable. The use case for exporting and importing deployment metadata artifacts is only for archiving configuration information in a version control system to monitor changes in the configuration.

You can use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to edit these types of deployment metadata artifacts:

- Registration—Registration artifacts enable you to edit application configuration information on a given environment (for example, if updating a product from non-SSL to SSL, you must edit the callback URLs in the Registration instance files).
- Oracle Hyperion Shared Services Registry—Shared Services Registry artifacts enable you to view registry content and export registry data to the file system where it can be edited and reimported.

> **Caution:**
>
> Do not use Lifecycle Management to migrate deployment metadata artifacts from one environment to another. Use Lifecycle Management to export deployment metadata artifacts to the file system; use a text editor to edit the artifacts; and then use Lifecycle Management to import the edited artifacts back into Oracle Hyperion Shared Services.

For a listing of deployment metadata artifacts, see Deployment Metadata Artifact Listing.

Deployment Metadata Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for deployment metadata must be assigned the LCM Administrator role.

Deployment Metadata Export and Import Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Enterprise Performance Management System products and verify that they are running.

- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator and Shared Services Administrator roles.

Deployment Metadata Artifact Listing

Deployment metadata artifacts are listed in the Foundation application group in Oracle Hyperion Shared Services Console. Users must be assigned the LCM Administrator role to view deployment metadata artifacts.

> **Note:**
>
> The artifacts displayed in Shared Services Console vary by implementation.

About the Registration Artifacts Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies

Registration Artifacts

The Registration directory contains products, applications, and application groups artifacts.

Table A-1 Registration Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Products	In Oracle Enterprise Performance Management System, an application type, such as Oracle Hyperion Planning or Oracle Essbase	Yes	No	Yes—XML	None

Table A-1 (Cont.) Registration Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Applications	Instances of EPM System products that are registered with Oracle Hyperion Shared Services	Yes	No	Yes—XML	None

Shared Services Registry Artifacts

The Shared Services Registry directory contains Shared Services Registry properties and product registry artifacts from previous releases.

Deployment Metadata Migration Considerations

- When importing an edited database password under deployment metadata, precede the property name with "ENCR" so that the password gets stored in an encrypted format.

  For example, edit the corresponding line in `component.Properties` as follows:

  ```
  ENCR:key1=plaintext
  ```

- LCM Administrators and LCM Designers cannot export or import deployment metadata information.

Deployment Metadata Export and Import Options

There are no export or import options for Oracle Hyperion Shared Services Registry artifacts. All deployment metadata artifacts must be exported to and imported from the file system. By default, deployment metadata artifacts are updated or merged.

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for deployment metadata are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

B

Calculation Manager and Lifecycle Management

About Calculation Manager Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate these types of Oracle Hyperion Calculation Manager artifacts:

- Rules
- Rule Sets
- Formulas
- Scripts
- Templates

For a list of Calculation Manager artifacts, see Calculation Manager Artifact Listing.

Calculation Manager Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Hyperion Calculation Manager must be assigned the following roles:

- LCM Administrator
- Calculation Manager Administrator
- Any application level roles

Calculation Manager Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Hyperion Calculation Manager and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator role, a Calculation Manager Administrator role, and any application level roles.
- Before migrating the product-specific artifacts, migrate the Shared Services artifacts (users, groups, and provisioning). See Migrating Native Directory (Security). For a listing of Shared Services artifacts, see Shared Services and Lifecycle Management.
- Oracle Hyperion Planning, Oracle Hyperion Financial Management, and Oracle Essbase applications must be created with the same name as the name in the source before importing their artifacts into Calculation Manager.

Calculation Manager Artifact Listing

Oracle Hyperion Calculation Manager artifacts are listed under the Calculation Manager node in the Foundation application group in Oracle Hyperion Shared Services Console.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies

Rules Artifacts

Table B-1 Rules Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Rules	Objects that can contain templates and calculations that are grouped in components	Yes	Yes	Yes—XML	None

Rule Sets Artifacts

Table B-2 Rule Sets Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Rule Sets	Objects that contain rules and other rulesets that can be calculated simultaneously or sequentially	Yes	Yes	Yes—XML	None

Formulas Artifacts

Table B-3 Formulas Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Formulas	Component that can be used in business rules and templates and contains calculation statements that users can write or design using members and functions, and optionally, conditional statements	Yes	Yes	Yes—XML	None

Scripts Artifacts

Table B-4 Scripts Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Scripts	Component that can be used in business rules and templates and contains only Visual Basic (for Oracle Hyperion Financial Management) or Oracle Essbase (for Oracle Hyperion Planning and Essbase) calc script statements	Yes	Yes	Yes—XML	None

Templates Artifacts

Table B-5 Templates Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Templates	User created components that perform a calculation or calculations	Yes	Yes	Yes—XML	None

Calculation Manager Application Migrations and Cross-Product Artifact Dependencies

When migrating Oracle Hyperion Calculation Manager applications from one environment to another (development-to-test or test-to-production), there are cross-product artifact dependencies.

Calculation Manager requires the following artifacts from other products to be migrated along with the Calculation Manager-specific artifacts.

- Oracle Hyperion Shared Services (users, groups, and provisioning)
- Oracle Essbase
- Oracle Hyperion Planning
- Oracle Hyperion Financial Management

Migration Export and Import Options

During import, Oracle Hyperion Calculation Manager artifacts will replace any existing artifacts on the destination environment. There is no option to merge artifacts.

Calculation Manager has no product-specific export or import options.

Sample Migration Definition Files

The product code used in the migration definition files for Oracle Hyperion Calculation Manager is `CALC`.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example B-1 Exporting to the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="Application" product="CALC" project="Foundation"
application="Calculation Manager" />
      <Target type="FileSystem" filePath="/CALC-Calculation Manager" />
      <Artifact recursive="true" parentPath="/Consolidation"
pattern="*" />
      <Artifact recursive="true" parentPath="/Essbase" pattern="*" />
      <Artifact recursive="true" parentPath="/Planning" pattern="*" />
```

```
...</Task>
</Package>
```

Example B-2 Importing From the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="FileSystem" filePath="/CALC-Calculation Manager" />
      <Target type="Application" product="CALC" project="Foundation"
application="Calculation Manager" />
      <Artifact recursive="true" parentPath="/Consolidation" pattern="*" />
      <Artifact recursive="true" parentPath="/Essbase" pattern="*" />
      <Artifact recursive="true" parentPath="/Planning" pattern="*" />
...</Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Calculation Manager are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

C

Essbase and Lifecycle Management

About Essbase Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate these types of Oracle Essbase artifacts:

- Calculation Scripts
- Custom-Defined Macros and Functions
- Data
- Database Properties
- Database Outlines
- Disk Volumes
- Drill-Through Definitions
- Excel Files
- Location Aliases
- Report Scripts
- Rule Files
- Security Filters
- Substitution Variables
- Tablespaces
- Text Files

For a listing and description of Essbase artifacts, see Essbase Artifact Listing.

Essbase Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Essbase must be assigned the following roles:

- LCM Administrator
- Server Access
- Calc
- Database Manager

> **Note:**
>
> The Server Access role is needed at the Essbase server level. At the application level, the Calc role is required to export source application artifacts, and the Database Manager role is required to import into destination applications.

Essbase Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Essbase and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator, Server Access, Calc, and Database Manager roles.
- Essbase applications—Before migrating security filters, you must migrate Shared Services (users, groups, and provisioning). See Migrating Native Directory (Security). For a listing of Shared Services artifacts, see Shared Services and Lifecycle Management.

  > **Note:**
  >
  > To use Lifecycle Management for Oracle Hyperion Planning or Essbase, Essbase must use Shared Services and not a legacy security mode.

- Before exporting Essbase data, ensure that the database is set to read-only mode to disallow any updates until the export process is complete.
- Before exporting data artifacts, ensure that you load data into the database; otherwise, the data migration will fail, because the artifacts will not have any value.

Essbase Artifact Listing

Oracle Essbase artifacts are listed in the Essbase application group in Oracle Hyperion Shared Services Console.

> **Note:**
>
> The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description

- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, Essbase Security Filters artifacts also require that Oracle Hyperion Shared Services security artifacts be migrated.

Essbase Server Artifacts

The Essbase Server directory contains substitution variable artifacts.

Table C-1 Essbase Server Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Custom-Defined Macros and Functions	Calculation functions	No	No	Yes—XML	None
Substitution Variables	Global placeholders for regularly changing information	No	No	Yes—XML	None

Essbase Application Artifacts

Each application directory (for example, Demo) contains application-specific substitution variable artifacts.

Table C-2 Essbase Application Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Custom-Defined Macros and Functions	Calculation functions	No	No	Yes—XML	None
Substitution Variables	Global placeholders for regularly changing information	No	No	Yes—XML	None
Tablespaces * See notes	Data storage optimizations	No	No	Yes—XML	None

Note:

1. Applicable only to ASO applications.
2. Export and import is supported only within the same operating environment. For example, if you export from a Windows environment, you must also import into a Windows environment.

Essbase Database Artifacts

Each Essbase application contains one or more database directories (for example, `Sample.Basic`) which, in turn, contain database-specific artifacts.

Table C-3 Essbase Database Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Calculation Scripts (or Calc Scripts)	A set of commands that defines how a database is consolidated or aggregated. A calculation script may also contain commands that specify allocation and other calculation rules separate from the consolidation process.	Yes	No	Yes—TXT	None
Data	All stored data, whether it is at the input member or aggregated/ consolidated at the parent level; for example, Stored Data, Dynamic Calc and Store.	No	No	Yes—TXT	Database Outline
Database Properties	Properties such as bufferSize, dataCacheSetting , dataFileCacheSetting, indexCacheSetting, sortBufferSize, and so on.	No	No	Yes—XML	None
Database Outline	Cube Outline file	Yes	No	No	None
Disk Volumes * See Notes	Data storage allocation	No	No	Yes—XML	None

Table C-3 (Cont.) Essbase Database Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Drill-Through Definitions	Oracle Hyperion Financial Data Quality Management and Oracle Hyperion Financial Data Quality Management, Enterprise Edition information	No	No	Yes—XML	None
Excel Files	External spreadsheet files that you can associate with data cells in Essbase	Yes	No	Yes—TXT, XML	None
Location Aliases	Descriptors that identify a data source. The location alias specifies a server, application, database, user name, and password. Location aliases are set by DBAs at the database level using Oracle Essbase Administration Services, ESSCMD, or the API.	No	No	Yes—XML	None
Report Scripts	Text files containing Essbase Report Writer commands that generate production reports	Yes	No	Yes—TXT, XML	None
Rule Files	Sets of operations that Essbase performs on data values or on dimensions and members when it processes a data source	Yes	No	No	None

Table C-3 (Cont.) Essbase Database Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Security Filters	Restrictions that control security access to data values or cells	No	No	Yes—CSV	Shared Services security artifacts
Substitution Variables	Global placeholders for regularly changing information	No	No	Yes—XML	None
Text Files	Text files used for loading data into Essbase cubes	Yes	No	Yes—TXT	None

Note:

1. Applicable only to BSO applications.
2. Export and import is supported only within the same operating environment. For example, if you export from a Windows environment, you must also import into a Windows environment.

Essbase Migration Considerations

- Certain text files (for example, MaxL script `*.mxl`, MaxL `*.msh`, and MDX script `*.mdx`) cannot be migrated using Oracle Hyperion Enterprise Performance Management System Lifecycle Management.
- Triggers cannot be migrated using Lifecycle Management. Instead, they can be migrated using MaxL.
- Partition definitions cannot be migrated using Lifecycle Management. Instead, they can be migrated using MaxL.
- Custom-defined Macros and Functions cannot be migrated using Lifecycle Management. Instead, they can be migrated using MaxL.
- Lifecycle Management does not prevent the migration of BSO artifacts into an ASO application and, conversely, ASO application artifacts to a BSO database, as long as the migration does not require creation of a new database at the destination. Outline is the restriction. Hence, data migration, which is dependent on the Outline, also cannot be migrated.
- Oracle Essbase Spreadsheet Add-in supports Substitution Variables at the Server level.
- To use Lifecycle Management for Oracle Essbase, Essbase must be in Oracle Hyperion Shared Services mode.

Essbase destination application considerations:

- The application can be predefined in Oracle Essbase Administration Services, or you can specify the application name in the `import.xml` file and execute the migration from CLU.
- The database is created automatically if it does not exist
- Data source and destination names must be the same
- If a cube does not exist and is automatically created, the outline is forcibly overwritten even if the "overwrite" flag is not selected.
- If an empty outline exists, the "Default Calc" artifact is not displayed in the artifact listing under the Calc Scripts directory.
- If Essbase does not exist in the target environment, Lifecycle Management creates an application shell.

Essbase Application Migrations and Cross-Product Artifact Dependencies

When migrating Oracle Essbase applications from one environment to another (development-to-test or test-to-production), cross-product artifact dependencies exist. Essbase requires artifacts from other products to be migrated along with these Essbase-specific artifacts.

- Oracle Hyperion Shared Services security (users, groups, and provisioning)
- **Optional**: Document Repository

Migration Export and Import Options

Migration Export Options

Oracle Essbase has no product-specific export options.

Migration Import Options

During import, Essbase artifacts will replace any existing artifacts on the destination environment. There is no option to merge artifacts.

Essbase import options:

- **Overwrite Artifacts**—Select to overwrite all artifacts in the destination location
- **Restructure Cube**—Choose from the following options:
  - **Retain cube data**—Retains the data in the cube when restructuring the cube outline
  - **Discard cube data**—Discards the data in the cube when restructuring the cube outline
  - **Keep only input data**—Retains only the input data when restructuring the cube outline
  - **Keep only 0 level data**—Retains only level 0 data when restructuring the cube outline

> **Note:**
>
> To access export and import options, launch Oracle Hyperion Shared Services Console and select **Administration**, and then **Migration Options**.

Sample Migration Definition Files

The product code used in the migration definition files for Oracle Essbase is `ESBAPP`.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example C-1 Exporting to the File System

```
<xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="Application" product="ESBAPP"
project="EssbaseCluster-1" application="Sample" />
      <Target type="FileSystem" filePath="/ESB-Sample" />
      <Artifact recursive="true" parentPath="/Configuration"
pattern="*" />
      <Artifact recursive="true" parentPath="/Databases" pattern="*" />
      <Artifact recursive="true" parentPath="/Substitution Variables"
pattern="*" />
   </Task>
</Package>
```

Example C-2 Importing from the File System

```
<xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="FileSystem" filePath="/ESB-Sample" />
      <Target type="Application" product="ESBAPP"
project="EssbaseCluster-1" application="Sample" />
      <Artifact recursive="true" parentPath="/Configuration"
pattern="*" />
      <Artifact recursive="true" parentPath="/Databases" pattern="*" />
      <Artifact recursive="true" parentPath="/Substitution Variables"
pattern="*" />
```

```
    </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Essbase are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

D

Essbase Studio and Lifecycle Management

About Essbase Studio Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate the Oracle Essbase Studio Catalog artifact. The Catalog artifact contains the dimensionality, hierarchies, data sources, folders, and all the artifacts within Essbase Studio. The Catalog artifact is listed under the Repository folder in Oracle Hyperion Shared Services Console. See Essbase Studio Artifacts.

Essbase Studio Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Essbase Studio must be assigned the following roles:

- LCM Administrator
- Essbase Studio Administrator

Essbase Studio Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Essbase Studio and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator and Essbase Studio Administrator roles.
- Before migrating the Essbase Studio product-specific artifacts, migrate the Shared Services artifacts (users, groups, and provisioning). See Migrating Native Directory (Security). For a listing of Shared Services native directory artifacts, see Shared Services and Lifecycle Management.

Essbase Studio Artifact Listing

The artifacts displayed in Oracle Hyperion Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.

- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.

Essbase Studio Artifacts

Oracle Essbase Studio artifacts are packaged into one artifact called **Catalog** under the **Repository** folder in Shared Services Console.

Table D-1 Essbase Studio Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Catalog	Contains the dimensionality, hierarchies, data sources, folders, and all the artifacts within Essbase Studio.	Yes	Yes	No	None

Essbase Studio Migration Considerations

There are no specific migration considerations for Oracle Essbase Studio.

Essbase Studio Application Migrations and Cross-Product Artifact Dependencies

Oracle Essbase Studio requires Oracle Hyperion Shared Services security (users, groups, and provisioning) to be migrated along with the Essbase Studio artifacts.

Migration Export and Import Options

Migration Export Options

Oracle Essbase Studio has no product-specific export options.

Migration Import Options

Essbase Studio has the following import option:

Import Mode

- **Replace**—If the element already exists in the catalog database, it is overwritten with the new element from the catalog file.
- **Merge**—If the element already exists in the catalog database, it is retained, and the duplicate element in the XML file is not used. A catalog database is created using the XML file. The import process is terminated if at least one of the imported object exists in the catalog.

- **Abort if element exists**—A catalog database is created using the XML file. The import process is terminated if at least one of the imported object exists in the catalog.

> **Note:**
>
> To access export and import options, launch Oracle Hyperion Shared Services Console and select **Administration**, and then **Migration Options**.

Sample Migration Definition Files

The product code used in the migration definition files for Oracle Essbase Studio is `BPM`.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example D-1 Exporting to the File System

```
<?xml version="1.0" encoding="UTF-8"?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password=""/>
   <Task>
      <Source type="Application" product="BPM" project="Essbase Studio
Server 11.1.2 Servers" application="Essbase Studio Server1"/>
      <Target type="FileSystem" filePath="/BPM-Essbase Studio Server1"/>
      <Artifact recursive="true" parentPath="/Repository" pattern="*"/>>
   </Task>
</Package>
```

Example D-2 Importing from the File System

```
<?xml version="1.0" encoding="UTF-8"?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password=""/>
   <Task>
      <Source type="FileSystem" filePath="/BPM-Essbase Studio Server1"/>
      <Target type="Application" product="BPM" project="Essbase Studio
Server 11.1.2 Servers" application="Essbase Studio Server1"/>
      <Artifact recursive="true" parentPath="/Repository" pattern="*"/>
   </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Essbase Studio are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

E

FDMEE and Lifecycle Management

About FDMEE Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate these types of Oracle Hyperion Financial Data Quality Management, Enterprise Edition artifacts:

Application Data Artifacts

- Application Category Mapping
- Application Definition
- Application Period Mapping
- Batch Definition
- Check Entity Groups
- Check Rule Groups
- Custom Script
- Custom Script Registration
- Data Load Mapping
- Data Load Rule
- Event Script
- Explicit Source Period Mapping
- HR Data Load Rule
- Import Format
- Import Script
- Location
- Logic Groups
- Metadata Rule

Global Setup Artifacts

- Application Settings
- Batch Group
- Category Mapping
- Custom Script Group
- Period Mapping
- Query Definitions

- Report Definitions
- Report Groups
- Security Settings
- Source Accounting Entity
- Source Adapter
- Source Period Mapping
- System Settings
- User Settings

For a description of these FDMEE artifacts, see FDMEE Artifact Listing.

FDMEE Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Hyperion Financial Data Quality Management, Enterprise Edition must be assigned the following roles:

- FDMEE Administrator
- LCM Administrator

FDMEE Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Hyperion Financial Data Quality Management, Enterprise Edition and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator and FDMEE Application Administrator roles.
- Before migrating the FDMEE product-specific artifacts, migrate the Shared Services artifacts (users, groups, and provisioning). See Migrating Native Directory (Security). For a listing of Shared Services native directory artifacts, see Shared Services and Lifecycle Management.
- Before migrating FDMEE product specific artifacts, manually create all the source system registrations in the target environment and initialize them.

FDMEE Artifact Listing

Oracle Hyperion Financial Data Quality Management, Enterprise Edition artifacts are listed under the FDMEE node in the FDM application group in Oracle Hyperion Shared Services Console.

> **Note:**
>
> The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was last modified. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, User Preferences artifacts also require that User Variables artifacts be migrated.

Application Data Artifacts

The Application Data directory contains artifacts for Consolidation applications and Oracle Hyperion Planning applications.

Table E-1 Application Data

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Application Category Mapping	Categorizes and maps source system data to a specific target Scenario dimension by application. This mapping overrides any global category mappings.	Yes	Yes	Yes	Application Definition, Category Mapping
Application Definition	Definition of the target application	Yes	Yes	Yes	None
Application Period Mapping	Period mapping between the source FDMEE system periods and the target Oracle Enterprise Performance Management System application periods. This mapping overrides any global period mappings.	Yes	Yes	Yes	Application Definition, Period Mapping

Table E-1 (Cont.) Application Data

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Batch Definition	Definition and parameters for FDMEE Batch processing	Yes	Yes	Yes	Data Load Rule, HR Data Load Rule, Metadata Rule
Check Entity Groups	Categorizes target system entities that are displayed in the validation report by location	Yes	Yes	Yes	Application Definition
Check Rule Groups	Define the detailed validation logic that is part of the validation reporting process	Yes	Yes	Yes	Application Definition
Custom Script	Scripts that are executed on an as needed basis	No	No	Yes	Application Data, Application Definition
Custom Script Registration	Script registration that establishes association for a script file with a custom script group and a target application	Yes	Yes	Yes	Application Data, Custom Script Group, Application Definition, Custom Script
Data Load Mapping	Relationships between source dimension members and target dimension members within a single dimension	Yes	Yes	Yes	Location
Data Load Rule	Rules to extract data from the FDMEE source system	Yes	Yes	Yes	Location
Event Script	Scripts executed in response to FDMEE events	No	No	Yes	Application Data, Application Definition

Table E-1 (Cont.) Application Data

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Explicit Source Period Mapping	Period mapping between the source FDMEE system periods and the target EPM System application periods that allows support of additional GL data sources where periods are not defined by start and end dates.	Yes	Yes	Yes	Application Data, Application Definition, Period Mapping
HR Data Load Rule	Rules to populate data and metadata in Oracle Hyperion Public Sector Planning and Budgeting applications	Yes	Yes	Yes	Location
Import Format	Mappings of source segments or chart fields to target application dimensions or fields from a flat file	Yes	Yes	Yes	Application Definition, Source Adaptor, Source Accounting Entity
Import Script	Imports scripts that are executed as source files	No	No	Yes	Application Data, Application Definition
Location	Mappings of source accounting entities and target applications	Yes	Yes	Yes	Import Format
Logic Groups	Categorize logic accounts	Yes	Yes	Yes	Application Definition
Metadata Rule	Rules to load source system dimension members into target EPM System applications	Yes	Yes	Yes	Location

Global Setup Artifacts

The Global Setup directory contains source accounting entities, source period mappings, category mappings, period mappings, and source adaptor artifacts.

Table E-2 Global Setup Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Application Settings	Configuration Settings that are set at the EPM Application level	Yes	Yes	Yes	Application Definition
Batch Group	Assigns security eligibility when executing batches by grouping batches based on the batch group assigned	Yes	Yes	Yes	None
Category Mapping	Globally categorizes and maps source system data to a specific target EPM System Scenario dimension member	Yes	Yes	Yes	None
Custom Script Group	Assigns similar types of custom scripts under a group for ease of use and help in assigning security	No	No	Yes	None
Drill Through Script	JavaScript based drill through script that enables drill through to a graphical user interface instead of a URL	No	No	Yes	None
Period Mapping	Global period mapping between the source FDMEE system periods and the target EPM System application periods	Yes	Yes	Yes	None
Query Definitions	Query definition for FDMEE reports These query definition entries are used by the BI Publisher templates provided with FDMEE	Yes	Yes	Yes	None

Table E-2 (Cont.) Global Setup Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Report Definitions	FDMEE report templates. These templates use a query that is defined in the query definition section.	Yes	Yes	Yes	Query Definition, Report Groups
Report Groups	Categorize reports and filter the list of reports in the user interface	Yes	Yes	Yes	None
Security Settings	Define security by system feature or location	Yes	Yes	Yes	None
Source Accounting Entity	Source ledgers or business units used in the integration	Yes	Yes	Yes	None
Source Adapter	Adapters to pull data from external systems.	Yes	Yes	Yes	None
Source Period Mapping	Period mapping between the source FDMEE system periods and the target EPM System application periods organized by source system	Yes	Yes	Yes	Period Mapping
System Settings	Configuration settings that are enabled at the system level for FDMEE	Yes	Yes	Yes	None
User Settings	Configuration settings that are enabled for a specific user	Yes	Yes	Yes	None

FDMEE Migration Considerations

- The source system must be initialized in both the source system and Oracle Hyperion Financial Data Quality Management, Enterprise Edition.
- The target application must be present in all the respective target products.

> **Note:**
>
> Migration from Release 11.1.2.3 to Release 11.1.2.4 using Oracle Hyperion Enterprise Performance Management System Lifecycle Management is supported.

FDMEE Application Migrations and Cross-Product Artifact Dependencies

When migrating Oracle Hyperion Financial Data Quality Management, Enterprise Edition artifacts from one environment to another (development-to-test or test-to-production), FDMEE requires artifacts from other products to be migrated along with the FDMEE-specific artifacts.FDMEE cross-product artifacts include Oracle Hyperion Shared Services Native Directory (users, groups, and provisioning).

Migration Export and Import Options

During import, Oracle Hyperion Financial Data Quality Management, Enterprise Edition artifacts validate any existing artifacts on the destination environment.

FDMEE import option:

Skip Validation—Skips the validation of target dimension members in the destination location during import

> **Note:**
>
> To access export and import options, launch Oracle Hyperion Shared Services Console and select **Administration**, and then **Migration Options**.

Sample Migration Definition Files

The sample migration definition files provided are for Oracle Hyperion Financial Data Quality Management, Enterprise Edition application migrations. The product code used in the migration definition files for FDMEE is AIF.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example E-1 Exporting to the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en</LOCALE>
   <User name="" password="" />
   <Task>
     <Source type="Application" product="AIF" project="FDM"
application="FDMEE" />
      <Target type="FileSystem" filePath="/FDMEE" />
      <Artifact recursive="true" parentPath="/Global Setup Artifacts"
pattern="*" />
   </Task>
</Package>
```

Example E-2 Importing to the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en</LOCALE>
   <User name="" password="" />
   <Task>
     <Source type="FileSystem" filePath="/FDMEE" />
      <Target type="Application" product="AIF" project="FDM"
application="FDMEE" />
      <Artifact recursive="true" parentPath="/Global Setup Artifacts"
pattern="*" />
   </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Financial Data Quality Management, Enterprise Edition are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

F

Financial Close Management and Lifecycle Management

About Financial Close Management Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate repository content for these types of Oracle Hyperion Financial Close Management artifacts:

Close Manager Artifacts

- Alert Types
- Custom Attributes
- Filters
- Global Integration Tokens
- Integration Applications
- Integration Types
- Periods
- Saved Views
- Schedules (includes task Alerts)
- Task Types
- Templates
- User Preferences
- Years

Account Reconciliation Manager Artifacts

- Account Types
- Aging Profiles
- Currencies
- Custom Attributes
- Custom Currencies
- Dashboard Definitions
- Filters
- Formats
- Frequencies
- Global Integration Tokens

- Global Settings
- Periods
- Power User Security
- Processes
- Profile Segments
- Profiles
- Rate Types
- Risk Ratings
- Saved Views
- Teams
- User Preferences

Supplemental Data Manager Artifacts

- Connections
- Currencies
- Currency Rates
- Currency Rate Types
- Data
- Data Collection Periods
- Datasets
- Dimensions
- Filters
- Form Templates
- Frequencies
- Integration Profiles
- Periods
- Preferences
- Saved Views
- System Settings

For a description of these artifacts, see Financial Close Management Artifact Listing.

Financial Close Management Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Hyperion Financial Close Management must be assigned the following roles:

- FCM Administrator
- LCM Administrator

Financial Close Management Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Hyperion Financial Close Management and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator and FCM Administrator roles.
- Before migrating the Financial Close Management product-specific artifacts, migrate the Shared Services artifacts (users, groups, and provisioning). See Migrating Native Directory (Security). For a listing of Shared Services native directory artifacts, see Shared Services and Lifecycle Management.
- For Close Manager, before migrating Integration Types, ensure that the following programs are up and running:
  - External asynchronous web services of any migrated system-automated Integration Types
  - Administration Server
  - Oracle SOA Suite Server
- For Account Reconciliation Manager, Oracle Hyperion Financial Data Quality Management, Enterprise Edition must be running and populated with data.
- For Account Reconciliation Manager, Shared Services data such as Users and Roles must be imported before importing Account Reconciliation Manager data.

Financial Close Management Artifact Listing

Oracle Hyperion Financial Close Management artifacts are listed in the Financial Close Management application group in Oracle Hyperion Shared Services Console.

> **Note:**
>
> The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.

- **Dependencies**—Lists artifact dependencies. For example, Financial Close Management Integration Types artifacts also require that Financial Close Management Integration Applications artifacts be migrated.

Close Manager Artifacts

Table F-1 Financial Close Management Close Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Alert Types	Categorize alerts into types such as hardware failure, software issues, and system failures	Yes	No	Yes—XML	None
Custom Attributes	Categorize templates, schedules, task types, and tasks	Yes	No	Yes—XML	None
Filters	Control which records are displayed in list views, dashboards, and report binders.	Yes	No	Yes—XML	Template
Global Integration Tokens	Enable the creation of parameterized URLs	Yes	No	Yes—XML	Custom Attributes **Note:** Global Integration Tokens may be dependent on Custom Attributes, but that is not always the case.
Integration Applications	Denote an external application with which Financial Close Management is integrated	Yes	No	Yes—XML	None
Integration Types	A definition of a service provided by an application that is integrated with Financial Close Management	Yes	No	Yes—XML	Integration Applications

Table F-1 (Cont.) Financial Close Management Close Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Periods	A hierarchical dimension that designates the time period to which the close activities apply; for example, a month or a quarter	Yes	No	Yes—XML	None
Task Types	Identify and categorize tasks commonly performed during a close period; for example, Data Entry, or G/L Extract	Yes	No	Yes—Zip **Note:** Editing is not recommended because the artifact must be extracted and the format of the compressed contents should be retained.	Period, Year, Alert Types, Custom Attributes, Integration Applications, Integration Types
Templates	A set of tasks that are repeatable over close periods. Administrators can create templates for different types of close periods, such as monthly or quarterly.	Yes	No	Yes—Zip Note: Editing is not recommended because the artifact must be extracted and the format of the compressed contents should be retained.	Period, Year, Alert Types, Custom Attributes, Integration Applications, Integration Types, Task Types
User Preferences	Preferences specific to the time zone used for a Financial Close Management application	Yes	No	Yes—XML	None
Years	A flat list that designates the year to which the close activities apply; for example, 2009, 2010, FY09, or FY10.	Yes	No	Yes—XML	None

Account Reconciliation Manager Artifacts

Table F-2 Financial Close Management Account Reconciliation Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Account Types	Classifies profiles, reconciliations, and adjustments according to a hierarchical structure	Yes	No	Yes—XML	None
Aging Profiles	A collection of aging buckets	Yes	No	Yes—XML	None
Currencies	A generally accepted medium of exchange. Financial Close Management seeds currency details such as currency code and symbol which are ISO compliant	Yes	No	Yes—XML	None
Custom Attributes	Categorize information for easier filtering and searching. Custom attributes are assigned to templates, schedules, task types, and tasks. For example, you can filter a task list to include only tasks with a specific custom attribute.	Yes	No	Yes—XML	None
Custom Currencies	Currencies that are not ISO compliant	Yes	No	Yes—XML	None
Dashboard Definitions	Views into schedules and task lists, and high-level summaries into which you can drill down for greater detail	Yes	No	Yes—XML	Filters, CSS Users, Aging Profiles

Table F-2 (Cont.) Financial Close Management Account Reconciliation Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Filters	Control which records are displayed in list views, dashboards, and report binders.	Yes	No	Yes—XML	Custom Attributes
Formats	Determine the method of reconciliation and the information that must be provided before the reconciliation can be sent on for review	Yes	No	Yes—Zip Note: Editing is not recommended because the artifact must be extracted and the format of the compressed contents should be retained.	Custom Attributes
Frequencies	How often reconciliations are prepared and renewed. Frequencies are defined in system settings and are associated with profiles and periods.	Yes	No	Yes—XML	None
Global Integration Tokens	Enable the creation of parameterized URLs	Yes	No	Yes—XML	Custom Attributes **Note:** Global Integration Tokens may be dependent on Custom Attributes, but that is not always the case.
Global Settings	Contains the Max File Upload, Dataload Context and "Days Before Due Date" system settings. These settings are established by the Administrator and apply to the entire Financial Close Management user base.	Yes	No	Yes—XML	None

Table F-2 (Cont.) Financial Close Management Account Reconciliation Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Periods	Unit of time for which an Account Reconciliation is completed; for example, January 2013, February 2013	Yes	No	Yes—XML	Frequencies
Power User Security	Security filters on account segments accessed by power users	Yes	No	Yes—XML	Profile Segments, CSS Roles
Processes	Associate profiles with a specific reconciliation process; for example, the balance sheet reconciliation process or the local GAAP reconciliation process	Yes	No	Yes—XML	None
Profile Segments	Profile account IDs stored in segments to facilitate filtering and reporting on the values	Yes	No	Yes—XML	None
Profiles	Contain the configuration settings that determine how and when reconciliations occur	Yes	No	Yes—Zip **Note:** Editing is not recommended, because the artifact must be extracted and the format of the compressed contents should be retained.	Custom Attributes, Formats, Periods, Account Types, Rate Types, Profile Segments
Rate Types	Associated with foreign exchange rates for use with profiles or reconciliations	Yes	No	Yes—XML	None

Table F-2 (Cont.) Financial Close Management Account Reconciliation Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Risk Ratings	Enable classification of profiles and reconciliations according to risk level. Risk ratings can be used to select accounts for reporting, or to facilitate assignment of preparers, frequencies, or other attributes.	Yes	No	Yes—XML	None
Teams	Defined and provisioned with Preparer, Reviewer, Viewer, and Commentator roles. Then, rather than assigning named users these roles on a profile or reconciliation, the role is assigned to the Team.	Yes	No	Yes—XML	None
User Preferences	Preferences specific to the time zone used for a Financial Close Management application	Yes	No	Yes—XML	None

Supplemental Data Manager Artifacts

Table F-3 Financial Close Management Supplemental Data Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Currencies	A generally accepted medium of exchange. Financial Close Management seeds currency details such as currency code and symbol which are ISO compliant.	No	No	No	None
Connections	Details to connect to another application for online integration such as importing metadata or posting data.	Yes	Yes	No	Non
Data Collection Periods	Combination of Period, Year and Frequency in which form can be deployed for data collection.	No	No	No	Period
Datasets	A set of attributes used in a supplemental schedule.	Yes	Yes	No	Dimension
Dimensions	A flat list of records containing metadata that could be referenced in data entry schedules.	Yes	Yes	No	None
Filters	Control which records are displayed in list views, dashboards, and report binders.	No	No	No	Integration Profile, Form Templates, Data Sets, Dimension, Scenario Dimension

Table F-3 (Cont.) Financial Close Management Supplemental Data Manager Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Form Templates	Definitions of supplemental data schedules that can be deployed to open periods for collecting and reviewing information among stakeholders.	Yes	Yes	No	DataSets
Frequencies	How often supplemental data is prepared and reviewed. Frequencies are defined in the system and are associated with periods.	No	No	No	None
Integration Profiles	Definitions of what metadata to be pulled from other applications that have online integration.	Yes	Yes	No	Connection
Periods	Unit of time for which a supplemental schedule is prepared; for example, January 2015, Quarter1 2014	Yes	Yes	No	Frequency
Preferences	Formatting options for a schedule	No	No	No	None

Financial Close Management Migration Considerations

- All Oracle Hyperion Financial Close Management users will be migrated as part of Oracle Hyperion Shared Services.
- In Close Manager, the following artifacts cannot be migrated:
  - Filters
  - User Preferences
  - Schedules
  - Alerts
- In Account Reconciliation Manager, the following artifacts cannot be migrated:

  - Reconciliations
  - Transactions
  - Currency Rates
- In Supplemental Data Manager, the following artifacts cannot be migrated:
  - Form Instances
  - Report Definitions

Financial Close Management Application Migrations and Cross-Product Artifact Dependencies

Oracle Hyperion Financial Close Management has no cross-product artifact dependencies.

Migration Export and Import Options

Migration Export Options

Oracle Hyperion Financial Close Management has no product-specific export options.

Migration Import Options

Financial Close Management import option:

Import Mode

- **Replace**—Overwrites a selected artifact with an imported artifact
- **Replace All**—Overwrites all the existing artifacts with the imported artifacts

> **Note:**
>
> To access export and import options, launch Oracle Hyperion Shared Services Console and select **Administration**, and then **Migration Options**.

Sample Migration Definition Files

The product code used in the migration definition files for Oracle Hyperion Financial Close Management is FCC.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example F-1 Exporting to the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="Application" product="FCC" project="Financial Close"
application="Financial Close Management" />
      <Target type="FileSystem" filePath="/FCM-Financial Close Management" />
      <Artifact recursive="true" parentPath="/Alert Types" pattern="*" />
      <Artifact recursive="true" parentPath="/Custom Attributes"
pattern="*" />
      <Artifact recursive="true" parentPath="/Integration Applications"
pattern="*" />
      <Artifact recursive="true" parentPath="/Integration Types"
pattern="*" />
      <Artifact recursive="true" parentPath="/Periods" pattern="*" />
      <Artifact recursive="true" parentPath="/Task Types" pattern="*" />
      <Artifact recursive="true" parentPath="/Templates" pattern="*" />
      <Artifact recursive="true" parentPath="/Years" pattern="*" />
   </Task>
</Package>
```

Example F-2 Importing from the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="FileSystem" filePath="/FCM-Financial Close Management" />
      <Target type="Application" product="FCC" project="Financial Close"
application="Financial Close Management" />
      <Artifact recursive="true" parentPath="/Alert Types" pattern="*" />
      <Artifact recursive="true" parentPath="/Custom Attributes"
pattern="*" />
      <Artifact recursive="true" parentPath="/Integration Applications"
pattern="*" />
      <Artifact recursive="true" parentPath="/Integration Types"
pattern="*" />
      <Artifact recursive="true" parentPath="/Periods" pattern="*" />
      <Artifact recursive="true" parentPath="/Task Types" pattern="*" />
      <Artifact recursive="true" parentPath="/Templates" pattern="*" />
      <Artifact recursive="true" parentPath="/Years" pattern="*" />
   </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Financial Close Management are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

G

Financial Management and Lifecycle Management

About Financial Management Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate repository content for these types of Oracle Hyperion Financial Management artifacts:

- Application Base Level Data
- Application Snapshot
- Configuration
- Documents
- Dimensions
- Forms
- InterCompany
- Journals
- Member Lists
- Phased Submission
- Rules
- Security

For a listing of Financial Management artifacts, see Financial Management Artifact Listing.

Financial Management Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Hyperion Financial Management must be assigned the following roles:

- LCM Administrator
- Application Administrator

Financial Management Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Hyperion Financial Management and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator and Application Administrator roles.

- Before migrating the Financial Management product-specific artifacts, migrate the Shared Services artifacts (users, groups, and provisioning). See Migrating Native Directory (Security). For a listing of Shared Services artifacts, see Shared Services and Lifecycle Management.
- Review the Financial Management artifact migration information in Financial Management Application Migrations.

Financial Management Application Migrations

- Before migrating, applications must be created in native Oracle Hyperion Financial Management.
- Financial Management requires Oracle Hyperion Shared Services (users, groups, and provisioning) and Taskflows artifacts to be migrated along with the Financial Management-specific artifacts.

Financial Management Artifact Listing

Oracle Hyperion Financial Management artifacts are listed in the Financial Management application group in Oracle Hyperion Shared Services Console.

> **Note:**
>
> The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time that the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, Financial Management Events artifacts also require that Financial Management Calendars artifacts be migrated.

Application Base Level Data Artifact

Table G-1 Base Level Data Artifact

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Data	Base level data including ownership information, exchange rate, and so on.	No	No	Yes	Security Class, Dimensions

> **Note:**
>
> In order to export or import Financial Management Data artifacts in a distributed EPM installation, Oracle Hyperion Enterprise Performance Management System Lifecycle Management must have a shared file system path. The domain account that has access to this shared/disk folder should be used to start services. Configure `hfmLcmServiceAppPool(IIS)` with this domain account.

Application Snapshot Artifact

Table G-2 Application Snapshot Artifact

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Application Snapshot	Complete application backup (can be restored later)	No	No	Yes	None

> **Note:**
>
> Application Snapshot migration requires all users to be logged out of the application. The system logs out all users and shuts down the application if there are no active tasks present for the application. The Application Snapshot is exported at the end of the migration after processing other artifacts. When importing, the Application Snapshot cannot be selected with other artifacts; however, if the application does not already exist in the target, you must include the application definition artifact to create the application shell.

Configuration Artifacts

Table G-3 Configuration Artifact

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Application Definition	Used to create application shells	No	No	Yes	None
Application Module Configuration	Allows system administrators to disable Financial Management modules for all users of an application	Yes	Yes	Yes	None

Documents Artifacts

Table G-4 Documents Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Custom Documents	User-defined documents such as Microsoft Word or Excel documents	Yes	No	No	Security Class
Data Explorer Reports	Displays information from data grids	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists
Folders	A file containing other files for the purpose of structuring a hierarchy	Yes	No	Yes—TXT, XML	Security Class
Links	A reference to a repository object. Links can reference folders, files, shortcuts, and other links.	Yes	No	Yes—TXT, XML	Security Class
Related Content	A link to content in another Oracle product, such as a report	Yes	No	Yes—TXT, XML	Security Class
Tasklists	A detailed status list of tasks for a particular user	Yes	No	Yes—TXT, XML	Security Class

Dimensions Artifacts

Table G-5 Dimensions Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Account	A dimension type that makes accounting intelligence available. Only one dimension can be defined as Accounts.	Yes	No	Yes—XML	Security Class
Appsettings	A metadata attribute	Yes	No	Yes—XML	Security Class
ConsolMethod	A metadata attribute	Yes	No	Yes—XML	Security Class
Currency	A metadata attribute	Yes	No	Yes—XML	Security Class
Custom (1–4)	A dimension created and defined by users. Channel, product, department, project, or region could be custom dimensions.	Yes	No	Yes—XML	Security Class
Entity	A dimension representing organizational units. Examples: divisions, subsidiaries, plants, regions, products, or other financial reporting units.	Yes	No	Yes—XML	Security Class
ICP	A dimension representing all intercompany balances that exist for an account. This is a reserved dimension that is used in combination with the Account dimension and any custom dimension.	Yes	No	Yes—XML	Security Class

Table G-5 (Cont.) Dimensions Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Period	A dimension representing time periods, such as quarters and months	Yes	No	Yes—XML	Security Class
Scenario	A dimension for classifying data (for example, Actuals, Budget, Forecast1, and Forecast2)	Yes	No	Yes—XML	Security Class
Value	A dimension representing the different types of values stored in your application, and can include the input currency, parent currency, adjustments, and consolidation detail such as proportion, elimination, and contribution detail	Yes	No	Yes—XML	Security Class
View	A dimension representing various modes of calendar intelligence; for example, Periodic, Year-to-Date, and Quarter-to-Date frequencies	Yes	No	Yes—XML	Security Class
Year	A dimension representing the fiscal or calendar year for data	Yes	No	Yes—XML	Security Class

Forms Artifacts

Table G-6 Forms Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Web Forms	Grid display on the Web that enables users to enter data into the database	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists
Web Grids	An object for entering and displaying data	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists

InterCompany Artifacts

Table G-7 InterCompany Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
ICT Matching Template	Set of predefined components for intercompany matching processes	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists
ICT Reason Codes	An explanation of an intercompany transaction's status	Yes	No	Yes—TXT, XML	None
Intercompany System Report	Information from intercompany matching processes	Yes	No	Yes—TXT, XML	Security Class, Dimensions, MemberLists
ICT System Reports	Information from intercompany transactions	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists
IC Matching By Account	InterCompany matching reports based on accounts selected	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists
IC Matching By Trans ID	InterCompany matching reports based on transaction ID	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists

Journals Artifacts

Table G-8 Journals Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Journal Groups	A user-defined element	No	No	Yes—TXT, XML	None
Journal System Reports	Displays information from journals	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists
Journal Templates	A journal function used to post adjustments that have common adjustment information for each period; for example, you can create a standard template that contains the common account IDs, entity IDs, or amounts, and then use the template as the basis for many regular journals.	Yes	No	Yes—TXT, XML	Security Class, Dimensions, Member Lists, Journal Groups

Member Lists Artifacts

Table G-9 Member Lists Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Member Lists	A named group, system- or user-defined, that references members, functions, or member lists within a dimension	Yes	No	Yes—XML	Dimensions

Phased Submission Artifact

> **Note:**
>
> To migrate Phased Submission artifacts, both the Source and Destination must be phase submission enabled.

Table G-10 Phased Submission Artifact

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Phased Submission	A stage of a process management unit	Yes	No	Yes—XML	None

Rules Artifact

Table G-11 Rules Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Rules	Automates the calculation of data within an application	Yes	No	Yes—XML	Dimensions

Security Artifacts

Table G-12 Security Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Security Class	An attribute for dimension members that specifies user permissions	Yes	No	Yes—TXT, XML	None
Security Class Access	Privileges assigned to a user for a security class	No	No	Yes—TXT, XML	Security Class

Financial Management Migration Considerations

- You must manually select any necessary dependencies.
- If Oracle Hyperion Financial Management does not exist in the target environment, Oracle Hyperion Enterprise Performance Management System Lifecycle Management creates an application shell. You must select the Application Definition artifact to create the application shell.
- In a distributed Financial Management environment, configure the import/export folder with the UNC path with Read/Write access for all the Financial Management Application Servers in the environment.

Financial Management Application Migrations and Cross-Product Artifact Dependencies

Oracle Hyperion Financial Management has no cross-product artifact dependencies.

Migration Export and Import Options

> **Note:**
>
> In previous releases, Oracle Hyperion Shared Services Console provided an "Include Dependent Artifacts" option for Oracle Hyperion Financial Management. This option is no longer available. Instead, you must manually select any necessary dependencies.

Migration Export Options

Financial Management has no product-specific export options.

Migration Import Options

During import, only Dimensions and Phased Submission artifacts have options to Replace or Merge existing artifacts on the destination environment. All other Financial Management artifacts will replace any existing artifacts during import.

Financial Management import options:

- **Dimension Import Mode**
  - **Replace**—Overwrites the artifacts with the imported artifacts
  - **Merge**—Merges the artifacts with the imported artifacts

    > **Note:**
    >
    > This option is applicable to all dimensions defined in a migration.

- **Phased Submission Assignment Import Mode**
  - **Replace**—Overwrites the artifacts with the imported artifacts
  - **Merge**—Merges the artifacts with the imported artifacts

> **Note:**
>
> To access export and import options, launch Shared Services Console and select **Administration**, and then **Migration Options**.

Sample Migration Definition Files

The sample migration definition files provided are for Oracle Hyperion Financial Management application migrations. The product code used in the migration definition files for Financial Management is `HFM` and the sample application is `COMMA`.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example G-1 Exporting to the File System

```
<Package>
   <LOCALE>en</LOCALE>
   <User name="" password="" />
   <Task>
      <Target type="FileSystem" filePath="/HFM-LINSCRIPT" />
      <Source type="Application" product="HFM" project="Default Application
Group" application="LINSCRIPT" />
      <Artifact recursive="true" parentPath="/Forms" pattern="*" />
      <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
      <Artifact recursive="true" parentPath="/Rules" pattern="*" />
      <Artifact recursive="true" parentPath="/Documents" pattern="*" />
      <Artifact recursive="true" parentPath="/Dimensions" pattern="*" />
      <Artifact recursive="true" parentPath="/InterCompany" pattern="*" />
      <Artifact recursive="true" parentPath="/Member Lists" pattern="*" />
      <Artifact recursive="true" parentPath="/Journals" pattern="*" />
      <Artifact recursive="true" parentPath="/Security" pattern="*" />
      <Artifact recursive="true" parentPath="/Phased Submission"
pattern="*" />
   /<Task>
</Package>
```

Example G-2 Importing from the File System

```
<Package>
   <LOCALE>en</LOCALE>
   <User name="" password="" />
   <Task>
      <Target type="Application" product="HFM" project="Default Application
Group" application="LINSCRIPT" />
      <Source type="FileSystem" filePath="/HFM-LINSCRIPT" />
      <Artifact recursive="true" parentPath="/Security" pattern="*" />
      <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
      <Artifact recursive="true" parentPath="/Forms" pattern="*" />
      <Artifact recursive="true" parentPath="/Rules" pattern="*" />
      <Artifact recursive="true" parentPath="/Documents" pattern="*" />
      <Artifact recursive="true" parentPath="/Dimensions" pattern="*" />
      <Artifact recursive="true" parentPath="/InterCompany" pattern="*" />
```

```
      <Artifact recursive="true" parentPath="/Member Lists"
pattern="*" />
      <Artifact recursive="true" parentPath="/Journals"
pattern="*" />
      <Artifact recursive="true" parentPath="/Phased Submission"
pattern="*" />
   </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Financial Management are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

H

Planning and Lifecycle Management

About Planning Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate these types of Oracle Hyperion Planning artifacts:

- Configuration
- Essbase Data
- Global
- Plan Types
- Relational Data
- Security

For a listing of Planning artifacts, see Planning Artifact Listing.

Planning Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Hyperion Planning must be assigned the following roles:

- LCM Administrator
- Planning Administrator
- Application Creator

> **Note:**
>
> The Planning Administrator role is required to perform Lifecycle Management listing, export, and import operations, and the Application Creator role is needed to create a Planning application.

Planning Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Hyperion Planning and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator, Planning Administrator, and Application Creator roles.
- Ensure that read access permissions are assigned to the LCM Administrator for task lists.

- Before migrating a Planning application, migrate the Shared Services artifacts (users, groups, and provisioning). See Migrating Native Directory (Security) for a list of Shared Services artifacts.

  > **Note:**
  >
  > To use Lifecycle Management for Planning or Oracle Essbase, Essbase must use Shared Services and not a legacy security mode.

- The following application-level Calendar properties must match in both the source and destination applications:
  - Start year
  - Base time period (for example, 12 months, Quarters, and Custom)
  - Start month
- The Period Dimension members must match in both the source and destination applications. For example, if the Period dimension in the source has a "Quarter 1" member, a "Quarter 1" member must exist in the destination.
- Source and destination plan types must match (for example, if the source application has a plan type called Plan1, a Plan1 plan type must exist and in the destination application).
- Source and destination plan types must be assigned in the same order (for example, if the source application has Plan1 and Plan2, Plan1 and Plan2 plan types must appear in the same order in the destination application).
- If the source has a "Single Currency" application type, then the destination application should be of the same type.
- The Application Type (General, Project Financial Planning, Public Sector Planning and Budgeting) must match in both the source and the destination applications.
- For Oracle Hyperion Public Sector Planning and Budgeting, the configuration options must match between the source and the destination applications. For example, if the source application has a type of "Position and Employee", then the destination application should also have a type of "Position and Employee".
- If the decision package option is enabled for the source application, then it must also be enabled for destination application.
- To migrate sandbox data using Lifecycle Management, you must refresh the cube before exporting the Planning application.

Planning Artifact Listing

Oracle Hyperion Planning artifacts are listed in the Planning application group in Oracle Hyperion Shared Services Console.

> **Note:**
>
> The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was last modified. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, User Preferences artifacts also require that User Variables artifacts be migrated.

Configuration Artifacts

Table H-1 Configuration Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Adhoc Options	Suppress options, precision options, replacement options, and other miscellaneous options that affect data in web grid	No	No	Yes—XML	Ad Hoc Forms
Data Load settings	Parameters that users can set to enable data to be loaded directly into an Oracle Essbase database	No	No	Yes—XML	Associated Dimensions
Properties—Application Definition and Application Settings	Functionality that enables users to set preferences for such aspects as email notification, alias tables, and display options	No	No	Yes—XML	None
User Preferences	Preferences that users can set for applications, display, printing, and user variables	No	No	Yes—XML	User Variables

Table H-1 (Cont.) Configuration Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
User Variables	Dynamically render data forms based on a users member selection, displaying only the specified entity; for example, a user variable named Department displays specific departments and employees.	No	No	Yes—XML	Associated Dimensions

Essbase Data Artifacts

Table H-2 Essbase Data Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Essbase Data	Planning Essbase data	No	No	No	None

Global Artifacts

Standard dimensions associated with more than one plan type are listed under Common Dimensions. This section also includes any associated attribute dimensions.

Table H-3 Global Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Calculation Manager Rulesets	Objects that contain rules and other rulesets that can be calculated simultaneously or sequentially	Yes	Yes	Yes—XML	None

Table H-3 (Cont.) Global Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Common Dimensions—Attribute	A type of dimension that enables analysis based on the attributes or qualities of dimension members. Associated with common standard dimensions.	Yes	No	Yes—CSV	None
Common Dimensions (Standard—Account)	A dimension type that makes accounting intelligence available. Only one dimension can be defined as Accounts	Yes	No	Yes—CSV	None
Common Dimensions (Standard—Currency)	A dimension representing currency	Yes	No	Yes—CSV	None
Common Dimensions (Standard—Entity)	A dimension representing organizational units; for example: divisions, subsidiaries, plants, regions, products, or other financial reporting units	Yes	No	Yes—CSV	Currency dimension gets loaded first
Common Dimensions (Standard—Period)	A dimension representing time periods, such as quarters and months	Yes	No	Yes—CSV	Year
Common Dimensions (Standard—Request Dimension)	A dimension representing Budget Requests	Yes	No	Yes—CSV	None
Common Dimensions (Standard—Scenario)	A dimension for classifying data; for example, Actuals, Budget, Forecast1, and Forecast2	Yes	No	Yes—CSV	Period and Year dimensions, Exchange Rates

Table H-3 (Cont.) Global Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Common Dimensions (Standard—Version)	Possible outcome used within the context of a scenario of data; for example, Budget - Best Case and Budget - Worst Case, where Budget is scenario and Best Case and Worst Case are versions	Yes	No	Yes—CSV	None
Common Dimensions (Standard—Year)	A dimension representing the fiscal or calendar year for data	Yes	No	Yes—CSV	None
Composite Forms	Displays members from several data forms simultaneously so you can, for example, enter data into one grid and see the results—such as Total Revenue—aggregated in another	Yes	No	Yes—XML	Associated Data Forms
Custom Menus	Menus that administrators create that are company- or application-specific. Users can right-click a member and select a menu item to open a URL, data form, or workflow.	Yes	No	Yes—XML	If menu is of type Workflow, then Planning Units
Dashboards	At-a-glance views of key information organized and presented in a way meaningful to a business need.	Yes	Yes	Yes—XML	Associated Data Forms

Table H-3 (Cont.) Global Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Decision Package	Proposals for new services, programs, business objectives, or outcomes in results based management or outcome based budgeting. Decision packages contain budget requests that identify and justify the costs involved in implementing the decision package.	Yes	Yes	Yes—XML	Decision Package Type
Decision Package Attributes	Custom attributes used to group, filter, or sort decision packages	Yes	Yes	Yes—XML	Smart Lists
Decision Package Type	Templates that specify the fundamental data and behavior that define the kind of decision packages and budget requests that budget preparers can create	No	No	Yes—XML	Associated forms, mappings, dimensions
Exchange Rates	A numeric value for converting one currency to another; for example, to convert 1 USD into EUR, the exchange rate of 0.8936 is multiplied with the U.S. dollar. The European euro equivalent of $1 is 0.8936.	Yes	No	Yes—CSV	Currency, Period, and Year
Jobs	Customized actions	Yes	Yes	Yes—XML	Associated Dimensions

Table H-3 (Cont.) Global Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Planning Unit Hierarchies	Specifies which application planning units and members are part of the budget process	Yes	Yes	Yes—XML	Entity, Scenario, Version and other associated dimensions
Report Mappings	Maps dimensions between Planning applications and reporting applications to enable reporting on Planning data in a reporting application, aggregations and queries on Smart Lists, and linking Planning data to multiple reporting applications for consolidations	Yes	Yes	Yes—XML	Associated dimensions and Smart Lists
Schedules	Scheduling information of actions that are set to run at intervals.	Yes	Yes	Yes—XML	Associated Business Rules, Report Mappings, Jobs
Smart Lists	Custom drop-down lists that users access from data form cells (instead of entering data)	No	No	Yes—CSV	None
Spread Patterns	A custom spreading pattern that determines how data is distributed from a parent to its children. The pattern is available from the Mass Allocate and Grid Spread menus.	No	No	Yes—XML	None
Substitution Variables	Global placeholders for information that changes regularly	No	No	No	None

Table H-3 (Cont.) Global Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Task Lists	A detailed status list of tasks for a particular user	Yes	No	Yes—XML	If task is of type Data Form, then associated Data Form. If task is of type Workflow, then Planning Units.
Valid Combination Rule	Rules that define valid dimensional intersections for data entry in Planning forms.	Yes	Yes	Yes—XML	Associated Dimensions

Plan Type Artifacts

Plan types are used to store Planning application information in the Essbase database. A separate database stores data for each plan type in the application and contains information relevant to that plan type to optimize application design, size, and performance. The default Planning plan types include Plan1, Plan2, and Plan3.

Table H-4 Plan Type Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Attribute Dimensions	A list of dimensions whose type enables analysis based on the attributes or qualities of dimension members	Yes	No	Yes—CSV	None
Calc Scripts	A set of commands that define how a database is consolidated or aggregated. A calculation script may also contain commands that specify allocation and other calculation rules separate from the consolidation process.	Yes	No	Yes	None

Table H-4 (Cont.) Plan Type Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Calculation Manager Rules	Objects that can contain templates and calculations that are grouped in components	Yes	Yes	Yes—XML	None
Data Forms	A grid display that enables users to enter data into the database from an interface such as a web browser, and to view and analyze data or related text. Certain dimension member values are fixed, giving users a specific view into the data. Data forms can include predefined data validation rules that help implement business policies and practices. Errors or warnings are generated on the data form if entered data violates a validation rule.	Yes	No	Yes—XML	Associated menus, user variables, and dimensions
Report Scripts	Text files containing Planning Report Writer commands that generate production reports	Yes	No	Yes	None
Rules files	Logical expressions or formulas that are created within an application to produce a preferred set of resulting values	Yes	No	No (Yes—Oracle Essbase Administration Services)	None

Table H-4 (Cont.) Plan Type Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Standard Dimensions	A list of dimensions associated with a single plan type	Yes	No	Yes—CSV	Attribute Dimensions, if any
Substitution Variables	Global placeholders for information that changes regularly	No	No	No	None

Relational Data Artifacts

Table H-5 Relational Data Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Account Annotations	Comments associated with accounts that can be plain text or URL links	No	No	Yes—XML	Account, Entity, Scenario, and Version Dimensions
Announcements	Information displayed on the Home page when logging in to the system	No	No	Yes—XML	None
Cell text	Text annotations associated with cells	No	No	Yes—XML	None
Planning Units	A data slice at the intersection of a scenario, version, and entity; the basic unit for preparing, reviewing, annotating, and approving plan data	No	No	Yes—XML	Entity, Scenario, and Version Dimensions

Table H-5 (Cont.) Relational Data Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Sandbox Changes	Details of the forms in which data modifications are made for every sandbox. Used for Oracle Hyperion Enterprise Performance Management System Lifecycle Management cloning. **Note:** To migrate sandbox data using Lifecycle Management, you refresh the cube before exporting the Planning application.	No	No	No	Forms, Essbase Data, and Version dimension
Supporting Detail	Calculations and assumptions from which the values of cells are derived	No	No	Yes—XML	None
Tablet Access	Artifacts (forms, tasks, rules and rulesets) made available on a tablet user interface.	No	No	Yes—XML	Forms, Tasks, Rules and Rulesets
Text Values	Text that is stored as data in cells whose data type is text	No	No	Yes—XML	None

Security Artifacts

> **Note:**
>
> Access permissions are a set of operations that a user can perform on a resource.

Table H-6 Security Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Access Permissions—Users	Company personnel who are provisioned as valid system users	No	No	Yes—XML	None
Access Permissions—Groups	A container for assigning similar access permissions to multiple users	Yes	No	Yes—XML	None

Planning Migration Considerations

- Oracle Hyperion Enterprise Performance Management System Lifecycle Management migration to and from Oracle Hyperion Planning is a long-running operation.
- Some Planning artifacts have dependencies; for example, forms have dimension dependencies. Instead of migrating only the dimension members required for a form, Lifecycle Management migrates the entire dimension. You must manually select any necessary dependencies. See Migrating Artifacts.
- The source and destination applications must have exactly the same settings for Plan Type, Calendar, and Single- or Multi-currency.
- If Planning does not exist in the target environment, Lifecycle Management creates an application shell.
- Oracle Essbase must be in Oracle Hyperion Shared Services mode to use Lifecycle Management.
- Essbase artifacts are displayed under the Planning application node, and the data artifact is displayed under the Essbase Data category.
- For a first-time test-to-production migration, Oracle recommends migrating all the Planning-related artifacts under the Planning node.
- Oracle recommends migrating Essbase data only for a first-time test-to-production migration, and not for any incremental migrations.
- To export or import Planning data artifacts, Lifecycle Management must have a shared file system path.
- To enable data migration across distributed environments, `filesystem.artifact.path` must be a shared path. The Lifecycle Management file system location must be accessible from all environments in the distributed setup.

Planning Application Migrations and Cross-Product Artifact Dependencies

When migrating Oracle Hyperion Planning applications from one environment to another (development-to-test or test-to-production), cross-product artifact dependencies exist.

Planning requires artifacts from these other products to be migrated along with the Planning-specific artifacts.

- Oracle Hyperion Shared Services (users, groups, and provisioning)
- Oracle Essbase

> **Note:**
>
> Essbase artifacts displayed with the Planning artifacts are Rules files, Calc Scripts, and Substitution Variables.

- **Optional**: Document Repository

> **Note:**
>
> Essbase artifacts are displayed with Planning artifacts.

Migration Export and Import Options

During import, Oracle Hyperion Planning artifacts will replace any existing artifacts on the destination environment. You cannot merge or delete artifacts during an import.

Planning has no product-specific export or import options.

> **Note:**
>
> In previous releases, Oracle Hyperion Shared Services Console provided an "Include Dependent Artifacts" option for Planning. This option no longer exists. Instead, you must manually select any necessary dependencies.

Sample Migration Definition Files

The sample migration definition files provided are for Oracle Hyperion Planning application migrations. The product code used in the migration definition files for Planning is `HP` and the sample application is `SampApp`.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example H-1 Exporting to the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="Application" product="HP" project="Default Application
Group" application="HPAuto1" />
      <Target type="FileSystem" filePath="/HP-HPAuto1" />
      <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
      <Artifact recursive="true" parentPath="/Global Artifacts"
pattern="*" />
      <Artifact recursive="true" parentPath="/Plan Type" pattern="*" />
      <Artifact recursive="true" parentPath="/Relational Data" pattern="*" />
      <Artifact recursive="true" parentPath="/Security" pattern="*" />
   </Task>
</Package>
```

Example H-2 Importing from the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="FileSystem" filePath="/HP-HPAuto1" />
      <Target type="Application" product="HP" project="Default Application
Group" application="HPAuto1" />
      <Artifact recursive="true" parentPath="/Configuration" pattern="*" />
      <Artifact recursive="true" parentPath="/Global Artifacts"
pattern="*" />
      <Artifact recursive="true" parentPath="/Plan Type" pattern="*" />
      <Artifact recursive="true" parentPath="/Relational Data"
pattern="*" />
      <Artifact recursive="true" parentPath="/Security" pattern="*" />
   </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Planning are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

Profitability and Cost Management and Lifecycle Management

About Profitability and Cost Management Artifacts

Oracle Hyperion Profitability and Cost Management has two types of artifacts: metadata or dimensional, and model artifacts.

There are three types of Profitability and Cost Management applications: Standard Profitability and Cost Management, Detailed Profitability and Cost Management, and Management Ledger Profitability and Cost Management. You use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate repository content for the model artifacts in both of these applications.

Standard Profitability and Cost Management Model Artifacts

```
AssignmentRules

Drivers

Model
    AssignmentRuleSelections
    DriverExceptions
    DriverRules
    RegularAssignments

POV

Preferences

SmartViewQueries

Stages
```

Detailed Profitability and Cost Management Model Artifacts

```
AssignmentRules

CalculationConfig

Drivers

Model
    POV1
        Stage 1
            CalculationRules
```

```
            AssignmentRuleSelections
            DriverExceptions
            DriverRules
    POV2
        Stage 1
            CalculationRules
            AssignmentRuleSelections
            DriverExceptions
            DriverRules

POV

Preferences

Processes

Scripts

SQLTemplates

Stages

TableRegistration
    Tables
    TableJoins

Tasks
```

Management Ledger Profitability and Cost Management Model Artifacts

```
Metadata

    ApplicationData (for future use; do not select for export or
import)
    Dimensions

Model
    POV1
        Program (contains rule sets and rules)

    POV2
        Program (contains rule sets and rules)

ModelViews

POV

Preferences

SmartViewQueries
```

For detailed information on Profitability and Cost Management model artifacts, see Profitability and Cost Management Artifact Listing.

Profitability and Cost Management Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Hyperion Profitability and Cost Management must be assigned the following roles:

- LCM Administrator
- Power User
- Administrator

Profitability and Cost Management Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Hyperion Profitability and Cost Management and verify that they are running. See the *Oracle Enterprise Performance Management System Installation and Configuration Guide* .
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator, Power User, and Administrator roles. See the *Oracle Enterprise Performance Management System User Security Administration Guide* .
- Create an application and then import metadata.

Profitability and Cost Management Artifact Listing

The artifacts displayed in Oracle Hyperion Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product. If NA, the artifact is not editable.
- **Dependencies**—Lists artifact dependencies. For example, Oracle Hyperion Profitability and Cost Management Assignment rules artifacts also require that Profitability and Cost Management Stage definition artifacts be migrated.

Standard Profitability and Cost Management Model Artifacts

Table I-1 Standard Profitability and Cost Management Model Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
AssignmentRules	A collection of member sets and optional filter sets for a single destination stage. These can be created and reused for multiple assignments that use the same parameters.	Yes	No	N/A	Stages
Drivers	In a Profitability and Cost Management model, these calculate the value of the allocations. They provide the formulas for allocating source intersection values to destination intersections.	Yes	No	N/A	None
Model	Model elements for a specific Standard Profitability model based on a selected POV. Includes the following model components: **AssignmentRuleSelections** Define the flow of data from source to destination, where the destination is defined by mapping the source intersection to one or more destination assignment rules. **DriverExceptions** Applied to drivers after a driver is created. Drivers must be associated with the single intersections to which they apply. **DriverRules** Applied to drivers after a driver is created. Drivers must be associated with the driver dimension members to which they apply. **RegularAssignments** Define the flow of data from source to destination, where the destination is defined by mapping the source intersection to a single destination intersection..	N/A	No	N/A	POV, Stages
POV	A version of a model for a selected snapshot, such as year, period, and status.	Yes	No	N/A	None
Preferences	Settings that apply to the entire model. Preferences might include whether intrastage assignments are allowed or whether you can have multidimensional stages. Oracle Essbase connection information for a selected model is specified in the application preferences.	Yes	No	N/A	None
SmartViewQueries	Queries data from Essbase cubes (ASO and BSO)	Yes	Yes	No	None
Stages	In a Profitability and Cost Management model, the processes or activities within the model.	Yes	No	N/A	None

Detailed Profitability and Cost Management Model Artifacts

Table I-2 Detailed Profitability and Cost Management Model Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
AssignmentRules	A collection of member sets and optional filter sets for the destination stage or for identifying sets within the source stage.	Yes	No	N/A	Stages, TableRegistration
CalculationConfig	Available calculation operations, including bulk edit expansion and driver operation types. **Note:** Oracle does not recommend importing or exporting the CalculationConfig artifact. Check with your administrator to determine whether this type of artifact is required.	Yes	No	N/A	Processes
Drivers	Available drivers in a Detailed Profitability model. The drivers calculate the value of the allocation, and provide the formulas for allocating source intersection values to destination intersections.	Yes	No	N/A	Preferences, CalculationConfig

Table I-2 (Cont.) Detailed Profitability and Cost Management Model Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Model	Model elements for a specific Detailed Profitability model based on a selected POV. Includes the following model components: **CalculationRules** Highest-level model definition artifact used to define allocations and calculation flow. Types of CalculationRules: Calculated Measures, Single Source Assignment and Multi Source Assignment. **AssignmentRuleSelections** Define the flow of data from source to destination, where the destination is defined by mapping the source intersection to one or more of the destination assignment rules. **DriverExceptions** Applied to drivers after a driver is created. Drivers must be associated with the single intersections to which they apply. **DriverRules** Applied to drivers after a driver is created. Drivers must be associated with the driver dimension members to which they apply.	N/A	No	N/A	Stages, Assignment Rules, Drivers, POVs
POV	A specific version of a model for a selected snapshot, such as year, period, and status.	Yes	No	N/A	None
Preferences	Settings that apply to the entire model. **Note:** Oracle recommends that you set the `model.data.schema` preference to the correct value in the target system before importing an application. If the target system has a value set for this preference, it will not be overwritten on import.	Yes	No	N/A	None

Table I-2 (Cont.) Detailed Profitability and Cost Management Model Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Processes	The definition of the process defined for each type of calculation. **Note:** Oracle does not recommend importing or exporting the Processes artifact. Check with your administrator to determine whether this type of artifact is required.	Yes	No	N/A	Tasks
Scripts	Custom SQL scripts stored in the HPM Product Schema in the `HPM_SQL_SCRIPT` table that are executed before or after calculation.	N/A	No	N/A	None
SQLTemplates	The definition of the SQL issued to perform tasks within each calculation type. **Note:** Oracle does not recommend importing or exporting the SQLTemplates artifact. Check with your Administrator to determine whether this type of artifact is required.	Yes	No	N/A	None
Stages	In a Detailed Profitability model, there is a Source Stage and a Destination Stage.	Yes	No	N/A	Preferences, TableRegistration
TableRegistration	Registration and mapping of user-defined tables to a Detailed Profitability application. Defines the Source and Destination Tables for the application, and the Table Joins for any associated Lookup tables.	N/A	No	N/A	Preferences
Tasks	The definition of the tasks performed for each type of calculation. **Note:** Oracle does not recommend importing or exporting the Tasks artifact. Check with your Administrator to determine whether this type of artifact is required.	Yes	No	N/A	SQLTemplates

Calculation Control Artifacts

Detailed Profitability and Cost Management applications use an advanced new construct called "calculation processes" to define how the model is calculated and to define certain other processing operations that are performed within the relational database. These

"calculation control" artifacts are related to Driver Operation Types and Other Process Types. See "Advanced Calculation Options" in the *Oracle Hyperion Profitability and Cost Management Administrator's Guide* .

The following Oracle Hyperion Enterprise Performance Management System Lifecycle Management calculation control artifacts are related to the calculation process definitions and administration:

- CalculationConfig
- Processes
- SQLTemplates
- Tasks

Modification of these artifacts is an advanced, undocumented activity that can be performed only under the direction of Oracle Support. It is therefore appropriate to export or import the calculation control artifacts only when directed to do so by Oracle Support. Unless Oracle Support tells you otherwise, when you export or import application artifacts using Shared Services Console, ignore these calculation process artifacts.

It is especially important to exclude these artifacts from your exports and imports when migrating an application across environments that may use different database platforms (such as Oracle or SQL Server) or different product versions. Deselect these artifacts before exporting to exclude them from your export files. If you are importing application artifacts from a previous export that contains any of these artifacts, be sure to deselect them before you import.

Management Ledger Profitability and Cost Management Model Artifacts

Table I-3 Management Ledger Profitability and Cost Management Model Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Metadata	Metadata elements for a specific Management Ledger Oracle Hyperion Profitability and Cost Management model. Includes Application Data (do not select) and Dimensions. The Dimensions includes one or more dimension member text files. **Note:** Application must be created outside of LCM before Dimensions may be imported. Once imported, dimensions cannot be updated via LCM; use the Update Dimensions job to update existing dimensions.	Yes	Yes	Yes	None

Table I-3 (Cont.) Management Ledger Profitability and Cost Management Model Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Model	Model elements for a specific Management Ledger Profitability and Cost Management model based on a selected POV. Includes the Program model component. The Program model component includes one or more Rule Sets, each composed of one or more Calculation Rules that together define the flow of data from source to destination. **Note:** Rule Sets and Rules are neither visible nor selectable within Oracle Hyperion Enterprise Performance Management System Lifecycle Management. When you import Program, the entire set of artifacts is imported. This set replaces existing Program artifacts in the target environment. Any Program artifacts in the target environment are deleted before the import occurs.	N/A	No	No	Metadata, POV
ModelViews	User defined views of data in the application used with rule balancing and trace screens.	Yes	No	N/A	Metadata
POV	A version of a model for a selected snapshot such as year, period, and status.	Yes	Yes	N/A	Metadata
Preferences	Settings that apply to the entire model. Oracle Essbase connection information for a selected model is specified in the application preferences.	Yes	Yes	N/A	None
SmartViewQueries	Queries data from Essbase cubes (ASO).	Yes	Yes	No	Metadata

Profitability and Cost Management Migrations and Cross-Product Artifact Dependencies

When migrating Oracle Hyperion Profitability and Cost Management applications from one environment to another (development-to-test or test-to-production), cross-product artifact dependencies exist. Profitability and Cost Management requires artifacts from the following other products to be migrated along with the Profitability and Cost Management-specific artifacts.

- Oracle Hyperion Shared Services (users, groups, and provisioning)
- Oracle Essbase (for Standard Profitability and Cost Management only)

Migration Export and Import Options

Migration Export Options

Program is the only product-specific Oracle Hyperion Profitability and Cost Management export option.

> **Note:**
>
> For Standard and Management Ledger Profitability and Cost Management, Oracle Essbase artifacts are exported (outlines, data, calc scripts) under the Essbase application.

Migration Import Options

Program is the only Profitability and Cost Management product-specific import option.

> **Note:**
>
> For Standard and Detailed Profitability and Cost Management, Oracle Hyperion Enterprise Performance Management System Lifecycle Management imports artifacts only if they are not present in the target model. Existing artifacts are not replaced or merged. For Management Ledger Profitability and Cost Management, pre-existing program artifacts are deleted and replaced.

Sample Migration Definition Files

The product code used in the migration definition files for Oracle Hyperion Profitability and Cost Management is `HPM`.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example I-1 Exporting to the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="Application" product="HPM" project="Default
Application Group" application="Bikes72" />
```

```
      <Target type="FileSystem" filePath="/HPCM-Bikes72" />
      <Artifact recursive="true" parentPath="/AssignmentRules" pattern="*" />
      <Artifact recursive="true" parentPath="/Drivers" pattern="*" />
      <Artifact recursive="true" parentPath="/Model" pattern="*" />
      <Artifact recursive="true" parentPath="/POV" pattern="*" />
      <Artifact recursive="true" parentPath="/Preferences" pattern="*" />
      <Artifact recursive="true" parentPath="/Stages" pattern="*" />
   </Task>
</Package>
```

Example I-2 Importing from the File System

```
<xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
     <Source type="FileSystem" filePath="/HPCM-Bikes72" />
     <Target type="Application" product="HPM" project="Default Application
Group" application="Bikes72" />
     <Artifact recursive="true" parentPath="/AssignmentRules" pattern="*" />
     <Artifact recursive="true" parentPath="/Drivers" pattern="*" />
     <Artifact recursive="true" parentPath="/Model" pattern="*" />
     <Artifact recursive="true" parentPath="/POV" pattern="*" />
     <Artifact recursive="true" parentPath="/Preferences" pattern="*" />
     <Artifact recursive="true" parentPath="/Stages" pattern="*" />
   </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Profitability and Cost Management are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*. Details are documented in the logging section of S9 Logging.

J

Shared Services and Lifecycle Management

About Shared Services Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate these types of Oracle Hyperion Shared Services artifacts:

- **Native Directory (Security)**—Shared Services artifacts enable you to migrate users, groups, delegated lists, custom aggregate roles, and assigned roles. Product-specific security artifacts (for example, Oracle Hyperion Planning access permissions and Oracle Essbase filters) are listed separately under the product application groups in Oracle Hyperion Shared Services Console. For a listing of application security artifacts by product, see the appendixes in this guide.
- **Taskflows**—Shared Services Taskflow artifacts enable you to migrate taskflow definitions from one environment to another or to edit taskflow definitions on the file system. Oracle Enterprise Performance Management System products that use taskflows are Oracle Hyperion Financial Management and Oracle Hyperion Profitability and Cost Management.

For a listing of Shared Services artifacts, see Shared Services Artifact Listing.

Shared Services Roles Requirement

Users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations for Oracle Hyperion Shared Services must be assigned the LCM Administrator role.

Shared Services Migration Prerequisites

- Install and configure Oracle Hyperion Shared Services and Oracle Enterprise Performance Management System products and verify that they are running.
- Ensure that users performing Oracle Hyperion Enterprise Performance Management System Lifecycle Management operations are assigned the LCM Administrator role. See the *Oracle Enterprise Performance Management System User Security Administration Guide* .
- When migrating Shared Services artifacts, ensure that the source and destination applications have matching names. If the source and destination names are different, perform these actions:
  1. Export the source application provisioning artifacts and download them to your system.
  2. In the source application CSV file (for example, `sourceapp.csv`), replace the source application group name with the destination application group name, and then replace the source application name with the destination application name.

3. Rename the file to use the destination application name (for example, *destinationapp*.csv).
4. Upload the updated LCM File system folder, and then import it back to the destination application.

- When migrating Shared Services native users across environments, if users in the source environment should not be migrated to the target environment, you must edit the exported content to remove these users before importing. In the File System, open the artifact `Users.csv` and remove the rows that should not be migrated. (Each row corresponds to one user.) Once edited, you can import the `Users.csv` artifact into the target environment, and the excluded users will not get created.

Shared Services Artifact Listing

Oracle Hyperion Shared Services artifacts are listed in the Foundation application group in Oracle Hyperion Shared Services Console. Only an LCM Administrator can view Shared Services artifacts in the Foundation application group.

> **Note:**
>
> The artifacts displayed in Shared Services Console vary by implementation.

About the Artifact Listing

Note the following about the artifact listing:

- **Artifact**—Artifact name
- **Description**—Artifact description
- **Last Modified Time**—If this parameter is supported, reflects the time the artifact was imported. Some artifacts do not support the last modified time parameter.
- **Last Modified User**—If this parameter is supported, reflects the user who last modified the artifact. Some artifacts do not support the last modified user parameter.
- **Editable on the File System**—If yes, the artifact can be edited on the file system using a text editor. If no, the artifact can be edited only within the product.
- **Dependencies**—Lists artifact dependencies. For example, Native Directory Groups artifacts also require that Native Directory Users artifacts be migrated.

Native Directory (Security) Artifacts

> **Note:**
>
> Native Directory is the default LDAP-based user directory that Shared Services uses.

Table J-1 Native Directory Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Users	A user directory entry that identifies a user	Yes	No	Yes—CSV	None
Groups	A container for assigning similar access permissions to multiple users	Yes	No	Yes—CSV	Users
Roles	Privileges that provide access to system artifacts and functions	Yes	No	Yes—CSV	Users, Groups
Delegated Lists	A list that identifies the users and groups that a Delegated Administrator can manage	Yes	No	Yes—CSV	Users, Groups
Assigned Roles (by product and application)	Roles granted to users and groups through the provisioning process	Yes	No	Yes—CSV	Users, Groups

Taskflow Artifacts

Table J-2 Taskflow Artifacts

Artifact	Description	Last Modified Time	Last Modified User	Editable on the File System?	Dependencies
Process Definition	Complete taskflow information, such as Stage, Link, and Application details	Yes	No	Yes—XML	Native Directory Users, Native Directory Groups
Taskflow ACL	ACL information in the taskflow	Yes	No	Yes—Properties	Native Directory Users, Native Directory Groups
Taskflow Scheduler	Scheduler information in the taskflow	Yes	No	Yes—XML	Native Directory Users, Native Directory Groups

Shared Services Application Migrations and Cross-Product Artifact Dependencies

Oracle Hyperion Shared Services has no cross-product artifact dependencies.

Shared Services Native Directory Migration Options

Migration Import Options

The following list describes Oracle Hyperion Shared Services import options:

- **Import Operation**—Select an option:
  - **Create**—Creates users, groups, and roles if they do not exist in the target. If they exist in the target, the create operation fails. Augments group, role, and provisioning relationships.
  - **Update**—Updates users, groups, and roles. Replaces group, role, and provisioning relationships.
  - **Create/Update**—Attempts a create operation on each entity in the file. If the operation fails, an update operation is attempted.
  - **Delete**—Deletes the users, groups, and roles that are being imported. Deletes group, role, and provisioning relationships.

> **Note:**
>
> To delete a deactivated user, the user must be activated first before it can be deleted.

- **Max errors before stopping import**—Specify the number of errors allowed before the import process is stopped.

CSV Files

The import source files are CSV files.

The CSV file format is a tabular data format that contains fields separated by commas and enclosed in double quotation marks. Oracle Hyperion Enterprise Performance Management System Lifecycle Management supports only Excel-compliant CSV files. The CSV files that Excel outputs differ from the standard CSV files:

- Leading and trailing white space is significant.
- Backslashes are not special characters and do not escape anything.
- Quotation marks inside quoted strings are escaped with double quotation marks rather than backslashes.

Excel converts data before putting it in CSV format.

Conversions that Excel performs on CSV files:

- Tabs are converted to single spaces.
- New lines are always represented as "\n".
- Numbers of greater than 12 digits are represented in truncated scientific notation form.

A separate CSV file is available for the following entities:

- Users

- Groups
- Roles
- Provisioning information
- Delegated lists

Each section within a CSV file is identified by two mandatory lines: entity and header. The entity line is identified by a predefined entity name preceded by the # character. The header line follows the entity line. The header line is a comma-separated list of predefined attributes for the entity.

The order of attributes in the header line is insignificant. However, the data lines, which follow the header line, must present data in the order in which the header line presents attributes. If data is not to be specified, use a comma to indicate that a value is not to be set. The entity line, header line, and data lines provide the information required for processing.

Boundaries applied to create, update, and delete operations on CSV files:

- Users, groups, and roles are processed one data line at a time.
- Group members are processed with multiple data lines under one header and one parent group.
- Role members are processed with multiple data lines under one header and one parent role.
- User provisioning is processed with multiple data lines under one header and one group or user.

Error handling is based on the process boundaries. One error is counted for each failure in a process boundary.

See the sections below for sample CSV files and attribute information:

CSV File for Users

Sample CSV File for User

```
#user
id,provider,login_name,first_name,last_name,description,email,internal_id,pas
sword,active
admin,Native Directory,admin,administrator,user,hss admin
user,admin@hyperion.com,"native://
DN=cn=911,ou=People,dc=css,dc=hyperion,dc=com?USER",
{SHA}W6ph5Mm5Pz8GgiULbPgzG37mj9g=,true
```

In this sample, the user CSV file is used to create the user `admin` in Native Directory with the login name `admin`, first name `administrator`, last name `user`, description `hss admin user`, e-mail id `admin@hyperion.com`, internal id `"native://DN=cn=911,ou=People,dc=css,dc=hyperion,dc=com?USER"`, encrypted password `{SHA}W6ph5Mm5Pz8GgiULbPgzG37mj9g=`, and active `true`:

> **Note:**
>
> Plain-text passwords specified in the CSV file are encrypted.

Table J-3 User Entity Attributes

Attribute	Description and Example
`id`	User's ID **Example:** `admin`
`provider`	**Optional**: Name of the source user directory **Example:**
`login_name`	User's login name **Example:** `admin`
`first_name`	**Optional**: User's first name **Example:** `administrator`
`last_name`	**Optional**: User's last name **Example:** `user`
`description`	**Optional**: User description **Example:** `hss admin user`
`email`	**Optional**: User's email address **Example:** `admin@example.com`
`internal_id`	The autogenerated internal identity of the user **Example:** "`native://DN=cn=911,ou=People,dc=css,dc=hyperion,dc=com?USER`"
`password`	User's password **Example:** `{SHA}W6ph5Mm5Pz8GgiULbPgzG37mj9g=`
`active`	Indicates whether user is active (true) or not active (false) **Example:** `true`

CSV File for Groups

Sample CSV File for Group

```
#group
id,provider,name,description, internal_id
WORLD,Native Directory,WORLD,Contains all users,611
```

In this sample, the group CSV file is used to create the `WORLD` group in Native Directory with the group ID `WORLD`, description `Contains all users`, and internal ID `611`.

Table J-4 Group Entity Attributes

Attribute	Description and Example
`id`	Group identifier **Example:** `WORLD`
`provider`	**Optional**: Source user directory for the group **Example:**
`name`	Group name **Example:** `WORLD`
`description`	**Optional**: Group description **Example:** `Contains all users`
`internal_id`	The autogenerated internal identity of the group **Example:** `611` **Note:** Do not modify the internal ID column data in the exported content.

CSV File for Roles

Sample CSV File for Role

```
#role
id,product_type,name,description
Viewer,hp-11.1.1,Viewer,Viewer
```

In this sample, the role CSV file is used to create an aggregated role in with role id `Viewer` for product `HP-11.1.1` (Oracle Hyperion Planning, version 11.1.1), role name `Viewer`, and description `Viewer`. Product type indicates the product to which the aggregated role belongs.

Table J-5 Role Entity Attributes

Attribute	Description and Example
`id`	Role identifier **Example:** `Designer_rep`
`product_type`	Product type (specified as *`product code-product version`*) to which the role belongs **Example:** `HP-11.1.1`
`name`	Role name **Example:** `Viewer`

Table J-5 (Cont.) Role Entity Attributes

Attribute	Description and Example
`description`	**Optional**: Role description **Example:** `Viewer`

CSV File for Provisioning

Sample CSV File for Provisioning

```
#provisioning
app_id,product_type,role_id,user_id,group_id
Planning,hp-11.1.1,Provisioning Manager,pturner,testgroup
```

In this sample, the provisioning CSV file is used to create a role assignment for application name `Planning`. The role ID is `Provisioning Manager`, which belongs to product type `HP-11.1.1`. User `pturner` and group `testgroup` are provisioned with this role.

Table J-6 Provisioning Entity Attributes

Attribute	Description and Example
`app_id`	The application to which the role belongs **Example:** `Planning`
`product_type`	Product type (specified as `product code-product version`) to which the role belongs **Example:** `hp-11.1.1`
`role_id`	Unique role identifier **Example:** `native://DN=cn=HUB:2,ou=HUB,ou=Roles,dc=css,dc=hyperion,dc=com?ROLE`
`user_id`	Unique identifier of a user who is provisioned to the role **Example:** `pturner`
`group_id`	Unique identifier of a group that is provisioned to the role **Example:** `testgroup`

CSV File for Delegated Lists

Sample CSV File for Delegated List

```
#delegated list
id,name,description,manager_id,manager_provider,user_id,user_provider,group_id,group_provider
```

```
testlist,testlist,my_list,admin,Native Directory,,testGroup,NativeDirectory
```

In this sample, the delegated list CSV file can be used to create a delegated list with list id and name `testlist`, and description `my_list`. User `admin` defined in Native Directory is the delegated administrator of this list, which allows `admin` to manage `testGroup` defined in Native Directory.

Table J-7 Delegated List Entity Attributes

Attribute	Description and Example
`id`	The list identifier, typically the same as the list name **Example:** `testlist`
`name`	Delegated list name **Example:** `testlist`
`description`	Delegated list description **Example:** `my_list`
`manager_id`	Unique identifier of a user or group who manages the list. Each manager must be identified in a separate definition. **Example:** `admin`
`manager_provider`	The user directory that stores the manager's account **Example:** `Native Directory`
`user_id`	Unique identifier of a user member of the list. Each member must be identified in a separate definition. **Example:** `admin`
`user_provider`	The user directory that stores the user member's account **Example:** `Native Directory`
`group_id`	Unique identifier of a group that is a member of the list. Each member must be identified in a separate definition. **Example:** `myGroup`
`group_provider`	The user directory that stores the group's account **Example:** `Native Directory`

Shared Services Taskflows Migration Export and Import Options

Oracle Hyperion Shared Services has no taskflow-specific export or import options. However, all imports will automatically overwrite destination artifacts.

The Oracle Enterprise Performance Management System products that use taskflows are Oracle Hyperion Financial Management and Oracle Hyperion Profitability and Cost

Management. Taskflows have associated applications and users that are exported with a taskflow.

For more information about taskflows, see the product documentation for Financial Management and Profitability and Cost Management.

Sample Migration Definition Files

The product code used in the migration definition files for Oracle Hyperion Shared Services is `HUB`.

> **Note:**
>
> If the correct syntax is not used in the migration definition file, an `'Incorrect format of MDF file'` error is displayed.

Example J-1 Exporting to the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="Application" product="HUB" project="Foundation"
application="Shared Services" />
      <Target type="FileSystem" filePath="/HSS-Shared Services" />
      <Artifact recursive="false" parentPath="/Native Directory"
pattern="Users" />
   </Task>
   <Task>
      <Source type="Application" product="HUB" project="Foundation"
application="Deployment Metadata" />
      <Target type="FileSystem" filePath="/HSS-Deployment Metadata" />
      <Artifact recursive="false" parentPath="/Shared Services
Registry" pattern="Properties" />
   </Task>
</Package>
```

Example J-2 Importing from the File System

```
<?xml version="1.0" encoding="UTF-8" ?>
<Package>
   <LOCALE>en_US</LOCALE>
   <User name="" password="" />
   <Task>
      <Source type="FileSystem" filePath="/HSS-Shared Services" />
      <Target type="Application" product="HUB" project="Foundation"
application="Shared Services" />
      <Artifact recursive="false" parentPath="/Native Directory"
pattern="Users" />
   </Task>
```

```
   <Task>
      <Source type="FileSystem" filePath="/HSS-Deployment Metadata" />
      <Target type="Application" product="HUB" project="Foundation"
application="Deployment Metadata" />
      <Artifact recursive="false" parentPath="/Shared Services Registry"
pattern="Properties" />
   </Task>
</Package>
```

Lifecycle Management Log Files

Oracle Hyperion Enterprise Performance Management System Lifecycle Management log files for Oracle Hyperion Shared Services are listed in the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.