Oracle® Fusion Cloud EPM

Administering Migration for Oracle Enterprise Performance Management Cloud

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Using Migration

Migration enables you to perform lifecycle management activities within Oracle Enterprise Performance Management Cloud services other than Narrative Reporting.

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About this Guide

Migration applies to these Oracle Enterprise Performance Management Cloud services:

- Account Reconciliation
- Planning
- Planning Modules
- FreeForm
- Financial Consolidation and Close
- Tax Reporting
- Profitability and Cost Management
- Enterprise Profitability and Cost Management
- Oracle Enterprise Data Management Cloud
- Sales Planning
- Strategic Workforce Planning

Accessing Migration for Lifecycle Management

You access Migration from a card on the Home page.

Migration is available separately for test and production environments.

To access Migration:

1. Access the service. See Accessing EPM Cloud in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

2. Complete a step:

   • Click **Tools**, and then **Migration**.

   • **Profitability and Cost Management only**: Click **Application** and then **Migration**.

   • Click ▤ (Navigator), and then **Migration**.

About Snapshots

Every day, during the operational maintenance of the environment, Oracle backs up the content of the environment to create a maintenance snapshot of existing artifacts, setup data, and Data Management staging table data.

This snapshot then can be used to migrate content to another environment. See Overview of the Maintenance Snapshot in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators* for a detailed description of the maintenance snapshot.

Additionally, Service Administrators can create full backup snapshots of the environment or incremental backup snapshots of artifacts at any time. See Backing up Artifacts and Application.

Audit and Job Console data are not part of Planning, Planning Modules, and FreeForm application snapshots. Use the cloneEnvironment EPM Automate command or the Clone Environment feature if you want to copy Audit and Job Console data to the target environment.

Snapshot Validity

Generally, a snapshot is compatible with the previous and next updates of an environment. For example, a snapshot from the 19.09 update of Oracle Enterprise Performance Management Cloud will be compatible with 19.08 and 19.10 environments, and can be imported into these environments.

> ✎ **Note:**
>
> • Oracle Enterprise Data Management Cloud and Narrative Reporting do not support the migration of snapshots from a monthly update to a previous monthly update (for example, when moving snapshots between test and production environments during the window when the test environment is upgraded before the production environment). It supports migration only across the same monthly update or to the next monthly update. Snapshots earlier than 21.12 are not supported in Oracle Enterprise Data Management Cloud.
>
> • Account Reconciliation supports the migration of individual artifacts to a previous monthly update, except for the Application Snapshot artifact.
>
> • All other business processes support the migration of snapshots from a monthly update to the previous and next monthly updates.
>
> You may, at your own risk, ignore this snapshot compatibility guidance and attempt to import older snapshots into an environment. This may work in some cases; you can verify successful migration by reviewing the Migration Status Report. Oracle neither tests nor certifies this approach.

Snapshot and File Retention Policy

Files and snapshots that you create or upload to an environment are deleted after 60 days. The daily maintenance process monitors the environment and automatically removes snapshots older than 60 days. If the total size of all snapshots exceeds 150 GB, it deletes snapshots from the last 60 days, oldest first, until the total size of snapshots is less than 150 GB. The daily maintenance snapshot, irrespective of its size, is always retained. If your maintenance snapshot is larger than 150 GB, then only the maintenance snapshot is retained; all other snapshots are deleted.

Data Management process log files are retained for seven days only. Oracle recommends that you regularly download the files you want to keep to a local machine.

About the XML Files in the Snapshot

The XML files included in EPM Cloud snapshots use an Oracle defined proprietary format. This format may change to accommodate changes that occur over EPM Cloud releases. Any custom process or utility that you use should not depend on the XML format remaining unchanged across EPM Cloud releases.
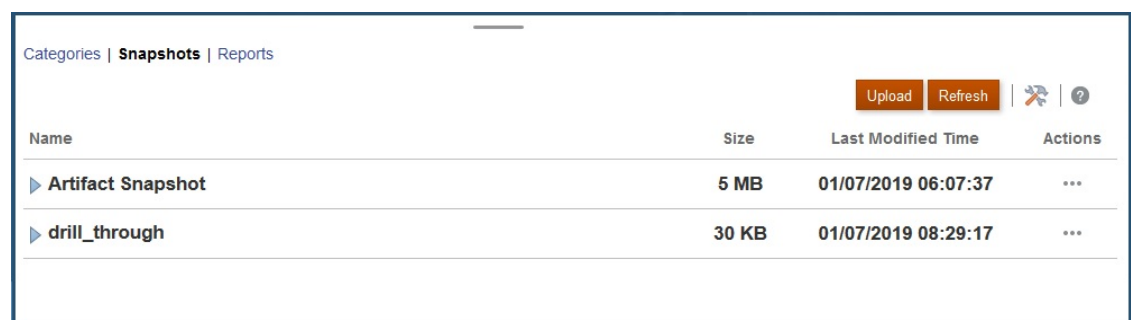
Manually Modifying Snapshots

Any changes you want to make to a snapshot must be made to the application before generating the snapshot. Never change the XML files in snapshots to update artifacts. If you update the XML files in the snapshots manually, the import may fail. Even if the import works, the application may perform incorrectly.

Oracle does not support manually changing the XML files in snapshots.

How do I Find the Modified Date?

Use the **Snapshots** tab in Migration to identify the size and the date and time when available snapshots were last modified.

The last modified time is displayed based on the time zone specified in User Preferences. If it is not set, the last modified time is displayed based on the browser time zone.

To view snapshot size and last modified time:

1. Access **Migration** (see Accessing Migration for Lifecycle Management).
2. Click **Snapshots**.

Backing up Artifacts and Application

You can create two types of snapshots: Backup and Export.

Related Topics

- [Backup Application](#)
- [Export Artifacts](#)

Backup Application

Use **Backup** to create a snapshot that can be used to clone an environment, for example to migrate an application from a production instance to a test instance for troubleshooting or additional development work.

When you backup the environment, you create a snapshot of the entire environment, similar to the daily maintenance snapshot, by exporting the application with all of its data and artifacts. Backups include artifacts belonging to Document Repository, Core (previously labelled Planning), Data Management, Calculation Manager, and Groups and Membership. Artifacts in Core includes Relational and Essbase data, global and security artifacts, configuration and plan type artifacts, etc. required for the current application. Please note that the availability of artifacts belonging to these categories is governed by the application in the current environment.

Backup of Essbase Data

Oracle Essbase data backups are performed with Essbase shut down (cold backup). To prevent potential data corruption, before starting the Essbase data backup, shut down all processes (consolidation, restructure, and so on) that modify ASO and BSO cubes.

Backup for Planning Only

The backup process exports data associated with member driven smart lists, if any, enabled in Aggregate Storage (ASO) cubes. Depending on the number of such members enabled for ASO, the cube design, and the amount of data the generated MDX query to export data may contain deep cross-join sections that may cause the backup process to fail with a memory allocation error.

Always use the daily maintenance snapshot to restore Planning environments.

Backup for Enterprise Journals

While migrating from test to production environment, do not include the following:

- JOURNAL_ID (accessed by selecting **Enterprise Journals**, then **Dimensions** and then **JOURNAL_ID**.

- Collection Interval Data (accessed by selecting **Enterprise Journals**, and then **Collection Interval Data**.

However, you should include Teams data if you have defined Teams in the source application (accessed by selecting **Close Tasks** and then **Teams**.

Backup for Data Management

The LCM Mode setting in Data Management gives the Service Administrator the control to backup and export of staging table (Workbench) data. The export of data can be a lengthy process depending on the LCM Mode setting and at this time the system goes into maintenance mode.

1. Before you migrate staging table data, create a baseline snapshot. The baseline snapshot is required to select options to add data to incremental snapshots.
   To create the baseline snapshot, in Data Management, select **All** as the **Snapshot Type** value.

2. Incremental snapshots created using the default export settings do not contain staging table data. To export and import this data, specify the required export settings in Data Management. Specifically, select **Single Snapshot – Setup and Data** as the value of the **LCM Mode** option.

For detailed steps, see these sources in *Administering Data Management for Oracle Enterprise Performance Management Cloud*:

• Using Lifecycle (LCM) Snapshot Modes

• Executing a Snapshot Export Job

Backup for Oracle Enterprise Data Management Cloud

The application is placed into maintenance mode when you create a backup snapshot.

Troubleshooting

See Resolving Import and Export and Backup Errors in *Oracle Enterprise Performance Management Cloud Operations Guide*.

Export Artifacts

Use **Export** to create an incremental backup of specific artifacts in an environment. Generally, you use incremental snapshots to create backups that can be used to update another environment.

Examples:

• Export artifacts that you tested in a test environment to create an interim snapshot, which you can import into a production environment. Similarly, you can export the Essbase data from one environment and then import it into another.

• Export groups that you created in an environment to create identical groups in another environment. To select groups for export, in **Categories**, expand **Groups and Membership** and then **Native Directory**, and select **Groups**.

> **Note:**
>
> Migration does not support the export and import of application audit records. If you need to export audit records, enable and export audit data using the audit features of your business process. See the administration guide for your business process for more information.

To create a snapshot:

1. Access **Migration** (see Accessing Migration for Lifecycle Management), and then complete one of the following steps.

2. **To back up the application:**

   a. Click **Backup**.

   b. In **Backup**, enter a destination folder name. By default, full application snapshots are exported to `Backup Date`; for example, `Backup 18-05-14`, folder, which you can change.
   For folder names, do not enter characters that are not supported by the native operating system. For example, Windows does not allow colons in a folder name.

The Migration Status Report, which indicates the progress of the operation, is displayed.

    c. Click **Refresh** to update the Migration Status Report to monitor progress. Click **Close** to close it.
If the backup fails for any reason, the report displays Failed as the status. Click **Failed** to open the Migration Details screen, which indicates why the backup process failed and the corrective action. You can attempt the operation again after correcting the error that caused the backup to fail.

    The folder containing the backup is listed in **Snapshots**.

3. **To export selected application artifacts from an environment:**

    a. In **Categories**, choose the artifacts you want to export.

- To export all artifacts of a component, select the check box next to the name of the component.

- To export specific artifacts of a component, click the name of the component. In **Artifact List**, open available folders, and then select the artifacts to export. Artifacts that are meaningful only during an application backup operation are greyed out and cannot be selected during incremental backups.

    b. **Optional:** Click ⊞ (Selected Artifacts), and then verify the list of artifacts selected for export.

    c. Click **Export**.

    d. In **Export**, click **OK**.
By default, incremental export snapshots are exported to `USER_NAME Date`; for example, `john.doe@oracle.com 18-05-14` folder, which you can change. For folder names, do not enter characters that are not supported by the native operating system. For example, Windows does not allow colons in a folder name.

    The Migration Status Report, which indicates the progress of the operation, is displayed.

    e. Click **Refresh** to update the Migration Status Report to monitor progress. Click **Close** to close it.
If the export fails for any reason, the report displays Failed as the status. Click **Failed** to open the Migration Details screen, which indicates why the export failed and the corrective action. You can attempt the export operation again after correcting the error that caused the export to fail.

    The folder containing exported artifacts is listed in **Snapshots**.

Key Considerations

For Enterprise Profitability and Cost Management:

During Migration Export executed in full backup mode, besides exporting the latest calculation run details for each POV, any calculation runs that failed within the last 7 days are also included. This encompasses runs from the past week with statuses other than **Completed** or **Completed With Warnings**.

Troubleshooting

See Resolving Import and Export and Backup Errors in *Oracle Enterprise Performance Management Cloud Operations Guide*.

Uploading Archives to the Service

Before you can import artifacts, data and metadata into an environment, you must upload an archive of such data into the environment.

Use this option to upload a ZIP file containing data, metadata, rule definitions, dimension definitions, mapped transactions, backup snapshots, etc.) from the local computer to the service. You cannot upload a ZIP file if a file with an identical name already exists in the service.

Oracle Enterprise Performance Management Cloud enforces these upload file size restrictions if you are using the web interface (for example, Migration):

* The maximum snapshot upload size is 2 GB

* The maximum file upload size is 500 MB

Consider using the uploadFile EPM Automate command to upload files that exceed these limits.

> **✎ Note:**
>
> Archives that you upload to the service are stored for 60 days, after which they are automatically deleted.

To upload an archive to the service:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Snapshots**, and then **Upload**.

3. Click **Browse**, select the ZIP file to upload to the service, and then click **Upload**.

4. Click **OK**.

Downloading Files and Snapshots from an Environment

You must download snapshots from product and test environments to maintain artifacts and data backups. There is no restriction on the size of files you can download from an Oracle Enterprise Performance Management Cloud environment.

To download files from the service to a local computer:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Snapshots**.

3. Select the snapshot or file that you want to download, click ••• (Actions), and then select **Download**.

   If you attempt to clone an environment that is in the process of generating or archiving the current snapshot; for example, during the daily maintenance, you will receive the `File not found` error.

4. Follow the on-screen instructions to save or open the file.

Deleting Snapshots and Archives

Be sure to download the snapshots you created to a local computer before deleting them from the environment.

> ⚠ **Caution:**
>
> Do not delete the daily maintenance snapshot.

To delete a snapshot or archive from the service:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.
2. Click **Snapshots**.
3. Select the snapshot or archive to delete.
4. Click ••• (Actions), and then select **Delete**.
5. Click **OK**.

Repeating an Export Operation

You can repeat a previous export operation to generate a new snapshot. Repeating an export operation reuses the settings you used previously for the export operation.

To repeat an export operation:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.
2. Click **Snapshots**.
3. Select a snapshot that you previously exported from the service.

    The settings that were used for exporting the snapshot are used for the export operation.
4. Click ••• (Actions), and then select **Repeat Export**.
5. In **Repeat Export**, rename the export folder, and then click **OK**.

    The Migration Status Report, which indicates the progress of the operation, is displayed.
6. Click **Refresh** to update the Migration Status Report to monitor progress. Click **Close** to close it.

    If the export fails for any reason, the report displays Failed as the status. Click **Failed** to open the Migration Details screen, which indicates why the export failed and the corrective action. You can attempt the export operation again after correcting the error that caused the export to fail.

    The folder containing exported artifacts is listed in **Snapshots**.

Renaming Snapshots and Archives

Rename an archive or snapshot to resolve a name mismatch. For example, you may want to rename an archive to match the file name used in a Planning job.

To rename snapshots and files:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Snapshots**.

3. Select the snapshot or file to rename.

4. Click ••• (Actions), and then select **Rename**.

5. Make the desired changes, and then click **OK**.

6. Click **OK**.

Setting Import Options

Import options specify the conditions for importing data into an environment from uploaded files and snapshots.

Default behavior for importing data:

- Migration always skips the validation of target dimension members in the destination location during import.

- Migration uses 100 as the maximum error threshold.

To set import options:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Snapshots**, and then (Migration Options).

3. Specify how you want to import group and membership information. Available options are:

   - Create or Update
     Adds new groups or updates the group membership of existing groups in Access Control. Also, assigns or unassigns application roles to users and groups.

   - Create
     Adds new groups. Changes made to any existing group are not imported. Also, assigns application roles for users and groups.

   - Update
     Modifies existing groups based on the information available in the import file. New groups are not added. Also, assigns or unassigns application roles to users and groups.

   - Delete
     Removes existing groups that are available in the import file. Also, unassigns application roles from users and groups.

4. Click **Save and Close** when you are done.

Importing Artifacts and Application from a Snapshot

You can import snapshots to create a clone of another environment or to migrate artifacts from another environment. Before you can initiate such process, you must upload the backup or incremental snapshot that you want to import into the target environment.

Do not run jobs in an environment while an import operation is in progress. Because the underlying data and metadata may be affected by an import operation, jobs may result in inaccurate results.

Methods to Upload Snapshots and Files

- Use Migration to download the snapshot from the source environment and then upload it to the target environment. See Downloading Files and Snapshots from an Environment and Uploading Archives to the Service .

- Use the downloadFile and uploadFile EPM Automate commands.

- Use the copySnapshotFromInstance EPM Automate command to copy a snapshot from another environment.

Key Considerations

- Excepting Strategic Modeling and Account Reconciliation, Oracle Enterprise Performance Management Cloud supports snapshot compatibility for one monthly cycle only; you can migrate maintenance snapshots from the test environment to the production environment and vice versa.

  Strategic Modeling and Account Reconciliation snapshots are not backward compatible. Account Reconciliation supports the migration of individual artifacts to a previous monthly update, except for the Application Snapshot artifact.

  The import process displays the following warning if the snapshot used for the process is not compatible with the current version of the environment.

  `EPMLCM-26000: This snapshot is from EPM Cloud` *`VERSION_NUMBER`* `that is incompatible with this update and may result in import errors.`
  You can upgrade incompatible snapshots other than Account Reconciliation and Oracle Enterprise Data Management Cloud snapshots to make them compatible with the current version of an environment. See "Recreating an Old EPM Cloud Environment for Audits" in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*.

- Only use LCM to import Journals if no Journals exist in the application. Otherwise, existing Journals will be deleted.

- After performing an LCM import, it's recommended to sign off and sign back in after the LCM import completes.

- After you initiate an import operation, EPM Cloud displays the Migration Status Report. Click **Refresh** periodically to update the report and monitor progress.

  If an import fails for any reason, the Migration Status Report displays **Failed** as the status. Click the status to open the Migration Details screen, which indicates why the import failed and the corrective action to take.

- Migration does not support the import of application audit records.

- If you are not importing users and a user in the source snapshot does not have a predefined role on the target environment, the following error is displayed:

  `EPMIE-00070: Failed to find user during assigned roles import.`

- **For Data Management**: The import process may take longer if the snapshot contains staging data.

- **For Oracle Enterprise Data Management Cloud**: The system is placed in migration mode when you import artifacts and snapshots.

Troubleshooting

See Resolving Import and Export and Backup Errors in *Oracle Enterprise Performance Management Cloud Operations Guide*.

Importing a Backup to Create a Clone of Another Environment

You import a backup snapshot (by default, named `Backup Date`) to create a clone of another environment.

Don't attempt to import a backup snapshot into an environment where an application already exists. If you want to import a backup snapshot into an environment with an existing application, first run the recreate EPM Automate command to restore your environment to a clean state, and then import the backup snapshot.

To import a backup to create a clone of another environment:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Snapshots**.

3. Click ••• (Actions) next to the backup snapshot that you want to import, and then select **Import**.

4. In **Import**, click **OK**.

   The Migration Status Report, which helps you monitor the import progress opens. Refresh the report frequently to verify that the operation completes without errors.

Importing Artifacts into an Environment

You import specific artifacts from a backup snapshot or an incremental snapshot to migrate artifacts from one environment to another. For example, you can import a snapshot of tested artifacts from a test environment into a production environment. Similarly, you can import Essbase data and artifacts from an incremental snapshot created by exporting them from another environment.

The import of some artifacts is governed by the import settings specified for the environment. See Setting Import Options.

To import artifacts:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Snapshots**.

3. Expand the snapshot containing the artifacts that you want to import.

4. Select artifacts to import.

   - **To import all artifacts of a specific component:**

     a. Expand the snapshot, and then click a component name; for example **HP–Vision**, to access a list of artifacts of the Vision sample application included in the snapshot.

     b. Click **Select All**.

     c. Click **Import**.

   - **To import specific artifacts of a component:**

     a. Expand the snapshot, and then click a component name; for example **HP–Vision** to access a list of artifacts of the Vision sample application included in the snapshot.

     b. In **Artifact List**, expand the list of available artifacts and then select the artifacts that you want to import.

    c. **Optional:** Click (Selected Artifacts), and then verify the list of artifacts selected for import.

    d. Click **Import**.

5. Click **OK** to confirm that you want to initiate the import operation.

The Migration Status Report opens. Use this report to monitor the progress of the operation.

2
Generating Reports

Migration Status report, Modified Artifacts report, and Artifact Updates reports are available from Migration.

These reports helps you manage your operations in Migration:

- Generating the Migration Status Report
- Viewing Artifact Modification History
- Generating the Artifact Updates Report

Generating the Migration Status Report

The Migration Status Report contains information on the artifact migrations that were performed in the service instance. For each migration, this report presents information such as the user who performed the migration, source, destination, start time, completed time, duration, and status.

The start time and completed time indicated in the report reflect the current time based on the browser time zone.

For failed migrations, by clicking the status, you can view the information such as the source and destination applications, artifact path, artifact name, and error that caused the migration to fail.

> ✐ **Note:**
>
> - Historic Migration Status data is removed after 30 days.
> - The Migration Status Report will not contain information on past migrations if you recreate the environment using the recreate EPM Automate command.

To view Migration Status Report:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.
2. Click **Reports**, and then **Migration Status**.

   The report is automatically generated to show all migrations performed in the last 30 days.
3. To regenerate the report, click **Refresh**.
4. To close the report, click **Close**.

Viewing Artifact Modification History

Viewing Artifact Modification History

You use the Modification History report to identify the artifacts that were modified after you created the original snapshot. Identifying changed artifacts helps you create new snapshots to back up the changes that were made to artifacts.

The service automatically generates this report to list all the artifacts modified by all the users. You can regenerate the report to list only specific artifacts or only the artifacts that a specific user modified.

To view Modification History report:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Snapshots**, and then select a snapshot.

3. Click ••• (Actions), and then select **Modification History**.

   The Modification History report is displayed.

4. **Optional:** Filter the report if needed:

   • Enter a name in **Artifact Name** to display the report for a specific artifact.

   • Enter a user name in **Modified By** to generate the report to list the artifacts that a specific user modified.

5. **Optional:** Export artifacts.

   a. Select the artifacts to export:

      • To create a snapshot containing all artifacts listed in the report, click **Select All**.

      • To create a snapshot containing specific artifacts, for each artifact you want to include in the snapshot, select the check box next to application name.

   b. Click **Export**.

   c. Enter a unique snapshot name, and then click **OK**.

      Review the Migration Status Report to confirm that the export completed without errors.

   d. Click **Close** to close the Migration Status Report.

Generating the Artifact Updates Report

Artifact Updates report contains information including the location of the artifact, application to which it belongs, and artifact type.

The Artifact Updates Report contains the following information on the artifacts that have been updated:

• Application to which the artifact belongs

• Artifact name

• Artifact type

• Name of the user who modified the artifact

• Date when the artifact was modified

• Location of the artifact

You can generate this report for all the components of the service or for selected components.

To generate the Artifact Updates Report:

1. Access **Migration**. See Accessing Migration for Lifecycle Management.

2. Click **Reports**, and then **Artifact Updates**.

3. Specify report settings:

   a. **Optional:** In **Artifact Name**, enter the name of the artifact (for example, Currency) for which the report is to be generated. Use * (asterisk) to report on all artifacts.

   b. **Optional:** In **Artifact Type**, enter artifact type (for example, Currency Dimension) for which the report is to be generated. Use * (asterisk) to report on all artifact types.

   c. **Optional:** In **Modified By**, enter the name of the user about whom the report is to be generated. Use * (asterisk) to report on all users.

   d. Specify the period for which the report is to be generated.

   e. Select the components for which the report is to be generated.

4. Click **Run Report**.

   Artifact Updates Reports Details is displayed. If you are not satisfied with the report, click **Back** to modify report parameters and then regenerate the report.

5. Select what you want to do with the report.

   • Click **Actions** and then **Export** to save the report to a file.

   • Click **Actions** and then **Export to CSV** to export the report into a Comma Separated Value (CSV) file.

   • Click **Actions** and then **Print Preview** to preview the report.

6. Click **Close** to close the report.

3

Cloning EPM Cloud Environments

The Clone Environment feature is a screen-based way to clone an environment (including Narrative Reporting environments) and, optionally, identity domain artifacts (users and predefined role assignments), and contents of the inbox, outbox, and stored snapshots.

Additionally, for Account Reconciliation, Planning, Planning Modules, FreeForm, Financial Consolidation and Close, Profitability and Cost Management, Enterprise Profitability and Cost Management, Tax Reporting, Sales Planning, and Strategic Workforce Planning you can clone Data Management records.

You can also clone the Job Console records available in Planning, Planning Modules, FreeForm, Financial Consolidation and Close, Enterprise Profitability and Cost Management, and Tax Reporting environments, and the application audit data available in Planning, Planning Modules, FreeForm, and Enterprise Profitability and Cost Management environments.

This command is an alternative to using the cloneEnvironment EPM Automate command.

Supported Cloning Scenarios

Cloning of environment is useful in migration scenarios, including the following:

- Migrating from Oracle Cloud Classic to OCI (Gen 2) Oracle Enterprise Performance Management Cloud
- Production to test cloning
- Test to production cloning

Unsupported Cloning Scenarios

Account Reconciliation, Oracle Enterprise Data Management Cloud, and Narrative Reporting do not support the cloning of an environment to an environment that is on a previous monthly update.

Cloning may fail if Planning contains a renamed seeded period member that has been supplanted by a custom period member. For example, you renamed the seeded YearTotal Period member to unused_YearTotal and then added an alternate type period member with the original seeded member name (YearTotal in this example).

Which Snapshot Can be Cloned?

This feature uses the current snapshot, named `Artifact Snapshot`, created by the last daily maintenance.

If changes you made to the environment after the last daily maintenance must be present in the snapshot being cloned, run the runDailyMaintenance EPM Automate command to regenerate `Artifact Snapshot`.

> **Note:**
>
> If you attempt to clone an environment that is in the process of generating or archiving the current snapshot; for example, during the daily maintenance, you will receive the `File not found` error.

Important Considerations

When you clone an environment, EPM Cloud automatically completes all the actions required to create an exact copy of the current application in a target environment. Prepare the target environment before initiating this process:

* Create and archive the latest backup snapshot of the target environment.
  Cloning does not delete the existing snapshots, or the files in the inbox and outbox of the target environment. If `Artifact Snapshot` exists in the target environment, cloning renames it as `Artifact Snapshot_DATE_TIME`; for example, `Artifact Snapshot_2021_04_30_17:06:06`.

* Initiate cloning after the scheduled daily maintenance of the source and target environments. If the daily maintenance of the source environment starts while cloning is going on, the cloning process will be terminated. The cloning process on the target environment is not affected even if the cloning is going on at the start time of the daily maintenance. In this scenario, the daily maintenance will run after the cloning is complete. If the cloning of your environment takes a long time, reschedule the daily maintenance start time on the source environment to avoid the cloning process from being terminated. For information on resetting the daily maintenance start time, see:

  – Setting the Maintenance Start Time for an Environment in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*

  – setDailyMaintenanceStartTime in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*

  – Viewing and Setting the Daily Maintenance Window Time in *REST API for Enterprise Performance Management Cloud*

About Account Reconciliation Application Settings

After cloning, the target Account Reconciliation application settings will reset to their default values. If you wish to retain the target application settings, export them from the source environment using the exportARApplicationProperties EPM Automate command. Then, after the cloning is complete, import the application properties into the target environment using the importARApplicationProperties EPM Automate command.

Handling Essbase Version During Cloning

If there is a mismatch between the Oracle Essbase version in the source and target environment, the cloning process will upgrade the Essbase version in the target environment to match that of the source environment. However, it will not downgrade the Essbase version in the target environment to match that of the source. For example, if the source is an EPM Enterprise Cloud Service environment with Hybrid-enabled Essbase and the target is a legacy EPM Cloud environment with Non-Hybrid Essbase, the clone process will upgrade the target environment to use Hybrid-enabled Essbase.

If you are cloning legacy environments, the cloning process handles the Essbase version as discussed in the following scenarios:

- Scenario 1 - You are cloning a source legacy environment that uses an Essbase version that does not support Hybrid cubes to a target legacy environment that uses an Essbase version that supports Hybrid cubes. In this scenario, the Essbase in the target environment is downgraded to match the version in the source environment.

- Scenario 2: You are cloning a source legacy environment that uses an Essbase version that supports Hybrid cubes to a target legacy environment that uses an Essbase version that does not support Hybrid cubes. In this scenario, the Essbase in the target environment is upgraded to match the version in the source environment.

- Scenario 3: You are cloning a source legacy environment that uses an Essbase version that does not support Hybrid cubes to a target EPM Standard Cloud Service or EPM Enterprise Cloud Service environment, which, by default, uses an Essbase version that supports Hybrid cubes. In this scenario, the Essbase in the target environment is not downgraded to match the version in the source environment.

See Migration Paths for EPM Standard Cloud Service and EPM Enterprise Cloud Service Snapshots in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

Troubleshooting

See Resolving Clone Environment Issues in *Oracle Enterprise Performance Management Cloud Operations Guide*.

Steps to Clone an Environment

While cloning an environment, these are your cloning options depending on the predefined role of the user account specified for the target environment:

Table 3-1   Clone Options for Predefined Role in Target Environment

Predefined Role	Available Clone Options
Service Administrator	Clone the application artifacts. Optionally clone Data Management records, audit data, Job Console records, contents of the inbox and outbox, and stored snapshots. Cannot clone users and predefined role assignments.
Service Administrator and Identity Domain Administrator	Clone the application artifacts. Optionally clone users and their predefined role assignments, Data Management records, audit data, Job Console records, contents of the inbox and outbox, and stored snapshots.

Prerequisites

- Ensure the user is not setup with Multi-Factor Authentication (MFA). Clone environment takes only basic authorization credentials for the target environment.

- Single Sign-On (SSO) - If you had setup SSO to authenticate the users, you must reconfigure SSO to ensure that your users can login to OCI environments using SSO. See Configuring Single Sign-On in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*

- IP Allowlist Configuration - If you had setup IP allowlists for your Oracle Cloud Classic environments using the Service Details screen of My Services, then you must reconfigure them for your OCI environments using `setIPAllowlist` EPM Automate command. This ensures that the connections from only the listed IP addresses are allowed on your OCI environments. See Setting up Secure Access in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

Configuration Steps

To clone an environment:

1. Sign in to the environment that you want to clone. You can sign in as a Service Administrator, or as a Service Administrator who also is an Identity Domain Administrator. For Oracle Cloud Classic to OCI cloning, you must sign in as a Service Administrator, who also is an Identity Domain Administrator to ensure that users and their roles are cloned to the OCI environment.

2. Complete a step:
   Click **Tools**, and then **Clone Environment**.

   Profitability and Cost Management only: Click **Application**, and then **Clone Environment**.

Clone Environment	Clone

   * Target URL   https://testExample-idDomain.pbcs.us1.oraclecloud.com
   Target Environment URL

   * Username   Service Administrator
   User name with only Service Administrator role or both Service Administrator and Identity Domain Administrator roles

   * Password   ••••••••••••••
   User password

   ☐ Users and Predefined Roles   ☑ Data Management   ☑ Application Audit   ☑ Job Console   ☐ Stored Snapshots and Files
   ☑ Daily Maintenance Start Time

   Snapshot   Artifact Snapshot - Created : 7/19/22 07:23:09

   Clone Status
   Clone Start Time :
   Clone Completed Time :

3. In **Target URL**, enter the URL of the environment that will become the cloned environment; for example, `https://testExample-idDomain.pbcs.us1.oraclecloud.com`.

4. In **Username**, enter the user name of a Service Administrator who may also have the Identity Domain Administrator predefined role.
   For Oracle Cloud Classic to OCI cloning, you must enter the user name of a user who has Service Administrator and Identity Domain Administrator predefined roles in the target environment.

   This user must be able to log into the target environment using identity domain credentials.

5. In **Password**, enter the identity domain password of the user specified in **Username**.

6. **Optional:** Select the **Users and Predefined Roles** check box to clone users and their predefined role assignments.

> ⚠️ **Caution:**
>
> - Do not change the login names of users (for example, from short name *jdoe* to email ID *john.doe@example.com*) in the target environment. Doing so will invalidate existing access control settings. Select this option to ensure that the login names of users are identical in the source and target environments.
>
> - Import of users and their predefined roles will fail if a user who is not an Identity Domain Administrator clones an environment after selecting this check box. The following error is recorded in the Migration Status Report:
>   ```
>   Failed to import External Directory Artifact
>   <artifact_name>. User <user_name> is not authorized to
>   perform this operation. The user needs to have Identity
>   Domain Administrator role to perform this operation.
>   ```

Key considerations:

- If you are not importing users and a user in the source snapshot does not have a predefined role on the target environment, the following error is displayed:

  ```
  EPMIE-00070: Failed to find user during assigned roles import.
  ```

- Users with only the Identity Domain Administrator role assignment are not cloned to the target environment. Users assigned to a combination of Identity Domain Administrator role and predefined roles in the source environment are cloned, but assigned only to the respective predefined roles in the target environment. These users will not have the Identity Domain Administrator role in the target environment.

- If the source environment is an OCI (Gen 2) environment where the users are assigned predefined roles using IDCS groups instead of direct assignment, the IDCS groups will not be cloned but the cloned users will have these predefined roles directly assigned to them in the target environment.

- Changes to the predefined roles of the user will be updated based on the roles assigned in the source snapshot. However, role assignments in the target will not be removed to match those in the source snapshot. For example, assume that `jdoe` is assigned to the Power User predefined role in the target environment, but has only the User role in the source snapshot. In this situation, this command assigns `jdoe` to the User role and does not remove the Power User role assignment in the target environment.

- This option does not delete existing users from the target environment if they don't exist in the source snapshot. For example, `jdoe` has an account in the target environment, but this account is not present in the source snapshot. In this situation, the account of `jdoe` in the target environment is not deleted.

- This option adds users that do not exist in the target environment; it does not update current user properties in the target environment even if those are different in the source snapshot. For example, if the last name of `jdoe` in the source snapshot is spelled differently in the target environment, the change will not be made in the target environment.

- This command does not change existing users' passwords in the target environment even if it is different in the source snapshot.

- A random password is assigned to new users in the target environment. New users will receive account activation emails prompting them to change passwords.

7. **Optional: for environments other than Oracle Enterprise Data Management Cloud and Narrative Reporting only:** Deselect the **Data Management** check box if you do not want to clone Data Management records. Cloning of Data Management records may take a long time if the staging tables contain a very large number of records.
   Clone Data Management records only if both the source and target environments are on the same monthly update, or the target environment is one update newer than the source environment. For example, you can clone 22.01 Data Management records to another 22.01 environment or to a 22.02 environment only.

8. **Optional: for Planning, Planning Modules, FreeForm, Financial Consolidation and Close, Tax Reporting, and Enterprise Profitability and Cost Management only:** Deselect the **Job Console** check box if you do not want to clone Job Console records.

9. **Optional: for Planning, Planning Modules, FreeForm, and Enterprise Profitability and Cost Management only:** Deselect the **Application Audit** check box if you do not want to clone application audit records.

> **Note:**
>
> Application audit data of Financial Consolidation and Close, and Tax Reporting is, by default, included in the snapshot.

10. **Optional:** Select the **Stored Snapshots and Files** check box if you want to clone the contents of inbox and outbox, and stored snapshots. This process may take a long time depending on the number and size of stored snapshots and files in inbox and outbox.

> **Note:**
>
> Clone Environment only clones the files stored directly in inbox and outbox. The files in sub-folders within inbox and outbox are not cloned. For example, if you have files file1.csv and myfiles/file2.csv in inbox, only file1.csv will be cloned.

11. **Optional:** Deselect the **DailyMaintenanceStartTime** check box to keep the current maintenance start time of the target environment. Otherwise, the maintainence start time will be reset to that of the source environment from which the snapshot was cloned.

12. Click **Clone** to initiate the process.

Tasks to Perform After Cloning Environments

If you are no longer going to use the source environment after completing the cloning process, you need to perform some steps to ensure that your URLs, scripts, bookmarks, and so on set for the source environment work seamlessly for the cloned environment. You must complete the following for a smooth transition if you are migrating from Oracle Cloud Classic to OCI.

Announce the URL of the Environment to EPM Cloud Users

Service Administrators should notify Oracle Enterprise Performance Management Cloud users of the new URL of the environment, including the following:

- URL to access the environment See Sample EPM Cloud URLs in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

- URLs to establish public and private Oracle Smart View for Office connections to the environment

In Oracle Cloud Classic to OCI cloning, the user names of EPM Cloud users remains the same as those in the source environment.

Modify EPM Automate and REST API Scripts

Modify the EPM Automate and REST API scripts that you plan to run against the cloned environment. These values must be modified:

- URL of the environment.
- Identity domain of the environment (you do not need to specify identity domain for OCI environments; it is optional for Oracle Cloud Classic environments).
- Password of the user if the password is different in the cloned environment.

Optionally Update Task Manager, Supplemental Data Manager, and Enterprise Journal Custom Report Queries

If required, update Task Manager, Supplemental Data Manager, and Enterprise Journal custom report queries, if any, in the cloned OCI environment. This update may be required because the internal IDs of objects such as tasks, Journals, and Attributes may change during the migration. This update may be required for cloned Planning, Planning Modules, Tax Reporting, and Financial Consolidation and Close environments.

> **Note:**
>
> Oracle-managed migration does not result in any change to the internal object IDs.

Update Smart View URLs

Modify the public and private connection Smart View URLs so that they point to the cloned environment. Also, update connection URLS as needed. See these information sources:.

- URL Syntax for Smart View Connections in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*
- "About Managing Connection URL Mappings" and "Updating Connection URL Mappings" in *Oracle Smart View for Office User's Guide*

Create New Vanity URLs

If your users use vanity URL to connect to the environments, create a new vanity URL or update the existing one to point to the URL of the cloned environment. See Using Vanity URLs in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

Change Bookmarks

Remind users to modify their bookmarks so that they point to the cloned environment.

Modify Integrated Business Process

Modify navigation flows by updating connections defined for integrated business processes to integrate the cloned environment into navigation flows.

> **Note:**
>
> If you are moving multiple instances in an integrated business process to a new domain, Single Sign On (SSO) between instances will not work until all instances are migrated.

Setup SSO

If you had setup SSO to authenticate the users and the migration resulted in a change in the identity domain being used, then you must reconfigure SSO. See Configuring Single Sign-On in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

> **Note:**
>
> You need not reconfigure SSO if you have done that as a prerequisite before cloning.

Reconfigure IP Allowlist

In the following conditions, you must reconfigure IP allowlists for your OCI environments using `setIPAllowlist` EPM Automate command. See Setting up Secure Access in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*:

- You are migrating to OCI environments
- You had setup IP allowlists for your Oracle Cloud Classic environments on the Service Details screen of My Services
- You have either not configured IP allowlists as a prerequisite before cloning or would like to make changes to the configuration after cloning

Reconfigure Integration Agent

Update the configuration for the Integration Agent to ensure that the cloned environment is properly integrated with it.

Update Integration with Other Services

If your source environment was integrated with other services, review the integration settings to ensure that the cloned environment is properly integrated with them.

Update IP Addresses

Update the configuration with new IP address in these cases:

- If you are using the IP address of the source EPM Cloud environment anywhere (for example, you have added it in your proxy configuration as an allowed outgoing IP address).
  Then, find the IP address of the target environment using nslookup or ping and update.
- If you are migrating from Classic to OCI environment and have added the outbound IP address of the Classic data center in the allow list of any other environment (for example, in a Fusion ERP environment).
  Then, change the IP address to the outbound IP address of the new OCI region. To get the outbound IP address of the OCI region where your environment is, refer to Outbound IP Addresses of EPM Cloud Data Centers and Regions in *Oracle Enterprise Performance Management Cloud Operations Guide*

4

Migrating On-Premises Applications to EPM Cloud

Use the information in this section to migrate an on-premises Oracle Enterprise Performance Management System application to an Oracle Enterprise Performance Management Cloud environment.

- Prerequisites and Notes
- Process Flow
  - Step 1: Migrate the Security Model
  - Step 2: Migrate Artifacts from the On-Premises Deployment to EPM Cloud
    - * Migrate Planning to Planning
    - * Migrate Financial Management to Financial Consolidation and Close
    - * Migrate Financial Close Management to Account Reconciliation
    - * Migrate On-premises Profitability and Cost Management to Profitability and Cost Management
    - * Migrate Strategic Finance to Strategic Modeling
    - * Migrate Data Relationship Management to Oracle Enterprise Data Management Cloud
  - Considerations for Migrating FDMEE-Based Applications

For information on the EPM Cloud application snapshots that can be migrated to the current environment, see "What Applications Can I Migrate to EPM Standard Cloud Service and EPM Enterprise Cloud Service? " in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

Prerequisites and Notes

Lists some factors you must consider before migrating an Oracle Enterprise Performance Management System application to an Oracle Enterprise Performance Management Cloud environment.

- General Prerequisites
- Default Application Properties
- Required Roles
- Artifacts Not Supported
- Modules and Applications Not Supported
- Reserved Words

General Prerequisites

Before migrating to Oracle Enterprise Performance Management Cloud, ensure that your on-premises applications are stable.

For example, Planning applications should not have invalid rules or cube refresh errors.

Default Application Properties

Any changes to default application properties made in the on-premises environment are ignored.

Upon import, all application properties default to preset values. For example, `ORACLE_ADF_UI`, `sync_on_logon`, `JDBC/OLAP min/max connections`, and `edit_dim_enabled`.

Required Roles

Only users with administrator access can perform migration tasks.

- In Oracle Enterprise Performance Management Cloud, the user performing all migration-related operations must have the Service Administrator predefined role.

  Exception: Only an Identity Domain Administrator can create users in the identity domain that supports an EPM Cloud service.

  See Understanding Predefined Roles in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

- In the on-premises environment, the user performing migration-related operations must have these roles:
  - Shared Services Administrator
  - Administrator role of the application that is being migrated

- The EPM Cloud environment into which you are migrating the application must not already contain an application (including sample application) and data.

Artifacts Not Supported

Some artifacts cannot be migrated from an on-premises environment to Oracle Enterprise Performance Management Cloud.

Migration of the following isn't supported:

- Shared Services custom roles
- Oracle Hyperion Reporting and Analysis Annotations and Batch Jobs

> **✎ Note:**
>
> ACLs defined for Financial Reports are lost during migration and must be defined manually in Planning.

- Saved preferences in Reporting and Analysis, including General Preferences
- Essbase global substitution variables

If your application has global substitution variables, convert them into application-specific variables before migrating. Perform this task in Oracle Essbase Administration Services by opening the Substitution Variables Editor and changing the value in the Applications column from All Apps to a specific application.

- Partition definition for Essbase cubes

- Custom settings, for example, cache setting for cube, specified in the Essbase configuration file

- Linked Reporting Objects

- Personal Pages and Workspace Pages, including the Home Page

- Objects with custom MIME types and objects with MIME types that are no longer supported, for example, Interactive Reporting documents and Web Analysis documents

- Essbase report scripts and rules (RUL) files

- Calculation scripts

Modules and Applications Not Supported

Some on-premises application modules cannot be migrated to Oracle Enterprise Performance Management Cloud.

The following modules and applications cannot be migrated to EPM Cloud:

- Horizontal planning modules such as Oracle Hyperion Workforce Planning, Oracle Hyperion Capital Asset Planning, Oracle Project Financial Planning, and Oracle Hyperion Public Sector Planning and Budgeting. Migration of these applications to Planning will fail, even if you removed Planning modules cubes from them, because business rules and forms span cubes.

- Oracle Hyperion EPM Architect-enabled Planning applications.

- Enterprise Resource Planning Integrator

Reserved Words

Some words are considered reserved words in Oracle Enterprise Performance Management Cloud. Ensure that reserved words (for example, operation, account type, aggregation, and description) are not used by your on-premises application.

Planning

Before migrating a Planning application, ensure that dimension, attribute, and alias names in the application don't conflict with the words reserved for Planning internal usage of dimension properties. If alias names conflict with reserved words, the import of the Planning application can fail. See Naming Restrictions.

Process Flow

Migration of an on-premises application to Oracle Enterprise Performance Management Cloud involves two broad steps: migration of security and migration of application.

The procedures for migrating the security model are similar for all migrations. The steps for migrating application artifacts differ based on the application and are discussed in a separate section for each migration scenario.

- Step 1: Migrate the Security Model

Step 1: Migrate the Security Model

Migrating the security model involves creating identity domain users and assigning them to roles. Identity Domain Administrator creates users using Oracle Identity Management Console while Service Administrators assign users to roles.

Additionally, using Access Control, you must create groups in the Oracle Enterprise Performance Management Cloud environment if your on-premises application uses groups to set grant access control on application artifacts.

This section details how to identify on-premises users, create user accounts for them in identity domain, and assign them to predefined roles.

> **✎ Note:**
>
> Information in this section applies to these on-premises to EPM Cloud migrations:
>
> - Planning to Planning
> - Oracle Hyperion Financial Management to Financial Consolidation and Close
> - Oracle Hyperion Financial Close Management to Account Reconciliation
> - Profitability and Cost Management to Profitability and Cost Management
> - Oracle Data Relationship Management to Oracle Enterprise Data Management Cloud

Identify On-Premises Users and Groups

Begin by generating a Provision Report to identify users who are authorized to access the on-premises application that you want to migrate and related components including Shared Services, Calculation Manager, FDM/Financial Data Quality Management, Enterprise Edition, and Oracle Hyperion Reporting and Analysis.

To identify on-premises Oracle Enterprise Performance Management System users and groups:

1. In the on-premises deployment, log in as an Administrator.

2. Select **Navigate**, **Administer**, and then **Shared Services Console**.

3. Generate a report that lists provisioned users.
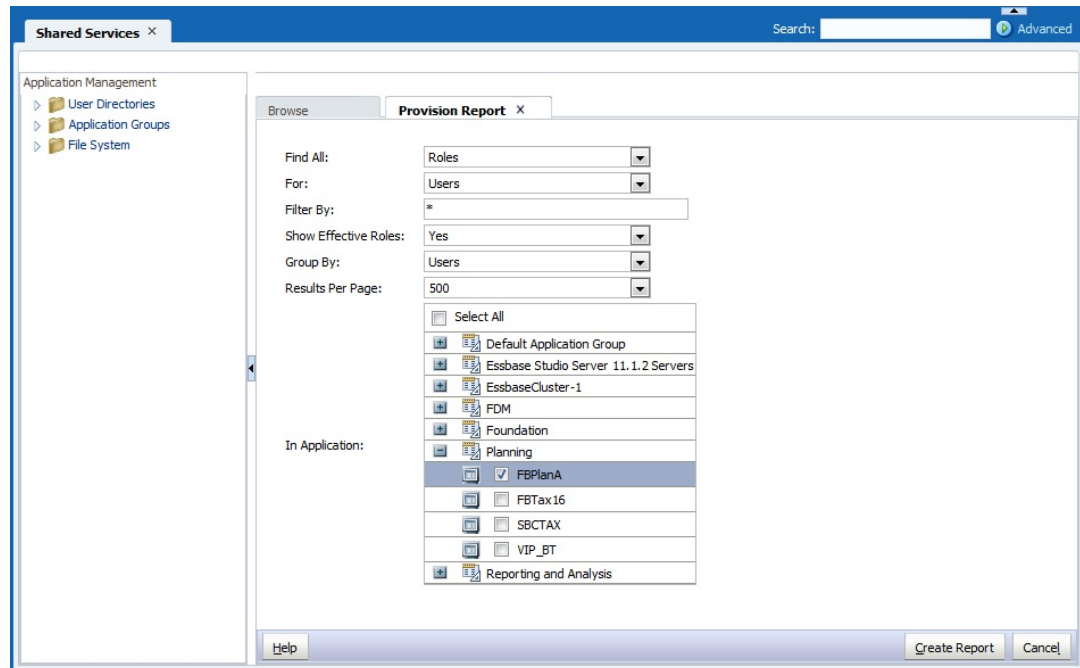
a. Select **Administration**, and then **View Provisioning Report**.

b. In **Find All**, select **Roles**.

c. In **For**, select **Users**.

d. In **Show Effective Roles**, select **Yes**.

e. In **Group By**, select **Users**.

f. From **In Application**, select the following:

> **Note:**
>
> Be sure to select all the Oracle Enterprise Performance Management System components that support the application that you are migrating.

- **Foundation**: Shared Services
- **Reporting and Analysis:** Reporting and Analysis
- **FDM:** FDM Enterprise Edition and ERP Integrator (if present)
- Application to migrate. For example, if you are migrating a planning application, expand **Planning** and then select the application that you want to migrate. Do not select multiple applications.

4. Click **Create Report**.

5. Click **Export to CSV** to create a Comma Separated Value (CSV) file of the report. Save the report to a secure directory.

Create Security Upload Files

Use the Provision Report that you generated as a reference to create user, group , and role upload (CSV) files (see Identify On-Premises Users and Groups). Security upload files facilitate the bulk loading of users into the identity domain, assigning users to predefined roles, creating groups in Access Control, and assigning access in Oracle Enterprise Performance Management Cloud.

Create User Upload File

Create a user upload file; for example, `users.csv`, to load on-premises users into the identity domain to create Oracle Enterprise Performance Management Cloud users.

Use the Provision Report that you generated to identify the users who should be allowed access to the service. All provisioned users of the on-premises application must be created as users in the identity domain.

Contents of a sample user upload file to load two users:

```
First Name,Last Name,Email,User Login
John,Doe,john.doe@example.com,jdoe
Jane,Doe,jane.doe@example.com,jndoe@example.com
```

> **✎ Note:**
>
> The User Login is optional. You may exclude it if you use the email address as the user name.

To create a user upload file:

1. Using a text editor, create a CSV file; for example, `users.csv`, and store it in a convenient location. Be sure to save the file as type `All Files (*.*)`.

2. Edit the user upload file:

    a. Enter the following as the file header:

    ```
    First Name,Last Name,Email,User Login
    ```

    b. Add user details, one line for each user. Separate each entry using a comma. For example:

    ```
    John,Doe,john.doe@example.com,jdoe
    ```

    > **✎ Note:**
    >
    > The email address must be unique.

3. Save and close the user upload file.

Create the Group Upload File

From the on-premises environment, export group information from Native Directory to create the `Groups.csv` file.

Groups that are used to grant access to application artifacts are identified in the **Inheritance Information** column of the Provision Report. See Identify On-Premises Users and Groups. Using the information in this column as a guide, edit `Groups.csv` to remove the groups that are not used to grant access permissions to artifacts in your on-premises environment.

The `Groups.csv` file that you generate doesn't contain information about groups from external directories that you used in the on-premises environment to grant access to artifacts. You must add information about such groups into `Groups.csv`.

The following is a sample `Groups.csv` file to load two groups: `plan_grp1` with child group `plan_grp9` and user member `jdoe`:

```
#group
id,provider,name,description,internalid
plan_grp1,Native Directory,plan_grp1, ,
plan_grp9,Native Directory,Plan_grp9, ,

#group_children (user members of group)
id,group_id,group_provider,user_id,user_provider
Plan_grp1, , ,jdoe,Native Directory

#group_children (group members of group)
id,group_id,group_provider,user_id,user_provider
plan_grp9,plan_grp1,Native Directory, , ,
```

> **✎ Note:**
>
> The `Groups.csv` file is used to create groups in the cloud environment using Access Control. You use these groups to recreate access control, similar to those that exist in the on-premises application, on artifacts.

To create `Groups.csv`:

1. In the on-premises deployment, log in as a Shared Service Administrator.

2. Select **Navigate**, **Administer**, and then **Shared Services Console**.

3. In the View pane, expand **Application Groups**, and **Foundation**, and then select **Shared Services**.

4. Right-click **Groups**, and then select **Export for Edit**.
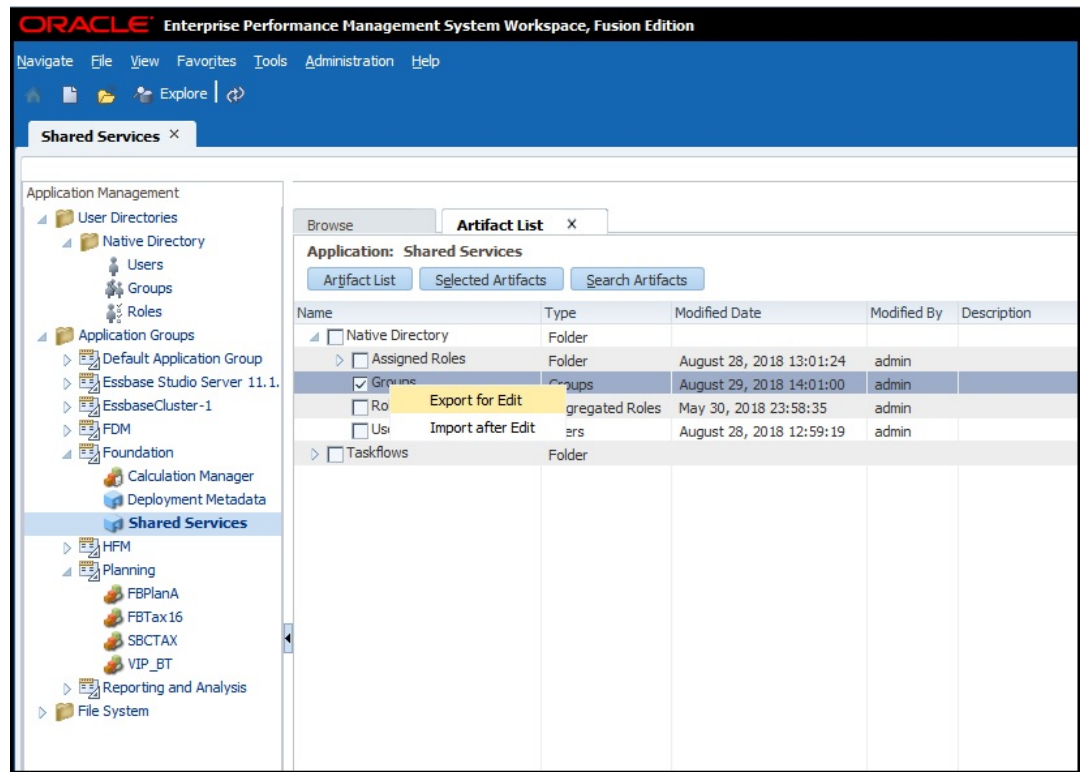
5. Save `Groups.csv`.

6. Edit `Groups.csv`:

   a. Using a text editor, open `Groups.csv` from the location where you stored it.

   b. Delete information for groups that are not used to provide access control on artifacts belonging to the application you are migrating.

   c. Add information about the external groups (see **Inheritance Information** column of the Provision Report) that are used to provide access control on artifacts belonging to the application you are migrating.

   d. Save and close `Groups.csv`.

Create Role Upload Files

Roles in the on-premises environment don't have equivalents in Oracle Enterprise Performance Management Cloud. Additionally,identity domain does not support groups, which means that only users can be assigned to predefined roles.

For services other than Oracle Enterprise Data Management Cloud, you use four role upload files, one for each predefined role, to assign roles to each user type. Please note that Oracle Enterprise Data Management Cloud needs only two upload files. You must manually create these upload files using the Provision Report (see Identify On-Premises Users and Groups) to identify the predefined roles that grant access similar to those that users have in the on-premises application. See these topics for on-premises to EPM Cloud role mappings.

• Planning

• Financial Management

• Financial Close Management

• Profitability and Cost Management and Enterprise Profitability and Cost Management

- Data Relationship Management

See Assigning One Role to Many Users in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

To create a role upload file:

1. Using a text editor, create a CSV file; for example, `power_user_role.csv`, and store it in a convenient location. Be sure to save the file as type `All Files (*.*)`.

2. Edit the file:

   a. Type `User Login` as the file header.

   b. Type the email address of each user who should be granted the predefined role.

      For example, if the Power User role is to be assigned to users John Doe and Jane Doe, the contents of the upload file may be as follows:
      ```
      User Login
      ```
      ```
      jane.doe@example.com
      ```
      ```
      john.doe@example.com
      ```

3. Save and close the file.

4. Repeat this process to create upload files for other predefined roles.

Upload Files to the Service

Before you can migrate security, a Service Administrator must upload the following files into the Oracle Enterprise Performance Management Cloud environment to which you are migrating the on-premises application.

- User upload file; see Create User Upload File

- Role upload files; see Create Role Upload Files

You use the uploadFile EPM Automate command to upload files.

The following procedure assumes that these files are stored in the `Oracle/EPM Automate/bin` folder.

Information on using EPM Automate is available in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*:

- About Running EPM Automate Commands

- Running EPM Automate

- EPM Automate Commands

To upload files to an EPM Cloud environment:

1. Open a command prompt (Windows) or a terminal window (Linux) and navigate to the directory where you installed the EPM Automate; generally, `C:\Oracle\EPM Automate\bin` folder on a Windows computer.

2. Sign in as a Service Administrator using a command similar to the following:

   ```
   epmautomate login example_admin example_password/password_file example_url
   ```

3. Upload the user and roles load files, one at a time. Use the following command:

   ```
   epmautomate uploadfile FILE_NAME
   ```

ORACLE

4. Using the listFiles command, verify that the uploaded files are available in the EPM Cloud environment.

```
epmautomate listfiles
```

5. Sign out.

```
epmautomate logout
```

Steps in EPM Cloud

- Create Users in the Identity Domain
- Assign Users to Predefined Roles
- Import Groups into Access Control

These procedures use the EPM Automate to complete tasks. Information on using the tool is available in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*:

- About Running EPM Automate Commands
- Running EPM Automate
- EPM Automate Commands

Create Users in the Identity Domain

In this step, an Identity Domain Administrator uses the user upload file to create users in the identity domain.

To create users in the identity domain:

1. Open a command prompt (Windows) or a terminal window (Linux) and navigate to the directory where you installed the EPM Automate; generally, `C:\Oracle\EPM Automate\bin` folder on a Windows computer.

2. Sign in as a Identity Domain Administrator using a command similar to the following:

```
epmautomate login example_domain_admin example_password/password_file
example_url
```

3. Using the addUserscommand, create identity domain users using the information in the user upload file. Command format is similar to the following

```
epmautomate addUsers file_name.CSV userPassword=ExamplePwd1 resetPassword=true
```

Assign Users to Predefined Roles

In this step, an Identity Domain Administrator or a Service Administrator uses the role upload files to assign users to predefined roles. While the users are common across the environments that share the identity domain, role assignments are specific to an environment.

To assign users to predefined identity domain roles:

1. Open a command prompt (Windows) or a terminal window (Linux) and navigate to the directory where you installed the EPM Automate; generally, `C:\Oracle\EPM Automate\bin` folder on a Windows computer.

2. Sign in as an Identity Domain Administrator or as a Service Administrator of the environment for which you are assigning users to predefined roles. Use a command similar to the following:

```
epmautomate login example_admin example_password/password_file example_url
example_identitydomain
```

3. Assign identity domain users to predefined roles using the information in a role upload file. Use a command similar to the following:

```
epmautomate assignRole file_name.CSV role_name
```

Acceptable role names are:

- Service Administrator

- Power User (does not apply to Oracle Enterprise Data Management Cloud)

- User

- Viewer (does not apply to Oracle Enterprise Data Management Cloud)

4. Repeat the preceding step to assign users to predefined roles based on the remaining load upload files.

Import Groups into Access Control

In this step, a Service Administrator imports groups into Access Control using the `Groups.CSV` file that you created earlier. See Create the Group Upload File.

To import groups:

1. From a browser, access the service as a Service Administrator.

2. Click ▤ (Navigator), and then **Access Control**.

3. Click **User Group Report**.

4. Click **Import from CSV**.

5. In **Import User Group Assignment CSV**, use **Browse** to locate and select `Groups.CSV` .

6. Click **Import** and click **Yes** to see a confirmation dialog box.

On completing the import process, a confirmation dialog box, which identifies the total number of processed assignments and status, is displayed.

Step 2: Migrate Artifacts from the On-Premises Deployment to EPM Cloud

Migration of on-premises application artifacts to Oracle Enterprise Performance Management Cloud differ based on the application you are migrating.

Use the appropriate application-specific topic to export artifacts from the on-premises environment and to complete the migration process:

- Migrate Planning to Planning

- Migrate Financial Management to Financial Consolidation and Close

- Migrate Financial Close Management to Account Reconciliation

- Migrate On-premises Profitability and Cost Management to Profitability and Cost Management

- Migrating On-premises Management Ledger Applications to Enterprise Profitability and Cost Management

- Migrate Data Relationship Management to Oracle Enterprise Data Management Cloud

> **⚠ Caution:**
>
> Windows does not permit folder and file names terminating in a period (.). If artifact names in your on-premises environment end in a period (for example, a Financial Reporting folder named `example_Ltd.`), the export archive you create by exporting artifacts to a Windows computer may cause errors and warnings during import into EPM Cloud. This is because Windows operating system automatically strips the terminating period from the artifact name there by causing a name mismatch between the artifact names in the XML descriptor file and the contents of the archive.
>
> **Workaround:** Using a software such as 7-Zip, edit the artifact name in the archive to include the terminating period.

Migrate Planning to Planning

- [Supported Migration Paths](#)
- [Export Planning Artifacts](#)
- [Zip and Upload the Exported Artifacts to the EPM Cloud Environment](#)
- [Import Planning Artifacts](#)
- [Validate and Troubleshoot](#)
- [Migrate Essbase Artifacts](#)

Supported Migration Paths

On-premises Planning

The on-premises instances that you are migrating to cloud must be on the latest available patch.

You can migrate the following releases of on-premises Planning applications to Planning:

- Releases of 11.1.2.3
- Releases of 11.1.2.4
- Releases of 11.2.x

> **✏ Note:**
>
> On-Premises 11.2.x Planning applications that use Oracle Essbase 21c cannot be migrated to Oracle Enterprise Performance Management Cloud.

Information on migrating Release 11.1.2.1 on-premises Planning applications is available in *Migrating Release 11.1.2.1 On-Premises Planning Applications to Oracle Planning and Budgeting Cloud*. This document is available from Oracle Support at https://support.oracle.com.

EPM Cloud Migration Path

You can migrate on-premises Planning applications to EPM Enterprise Cloud Service custom applications.

On-premises Planning module applications (Workforce, Strategic Modeling, and so on) cannot be migrated to EPM Cloud.

Export Planning Artifacts

Before exporting Planning applications, ensure that the plan type name is identical to the cube name. If not, the cross application data map creation in the migrated Planning application in Oracle Enterprise Performance Management Cloud will fail.

To export artifacts from the on-premises deployment:

1. In the on-premises deployment, log in as a Shared Services Administrator.

   This user must be provisioned with the Administrator role of **Calculation Manager**, **Reporting and Analysis**, and the application that you want to migrate.

2. Select **Navigate**, **Administer**, and then **Shared Services Console**.

3. If the Planning application that is being exported uses Calculation Manager as the rule engine:

   a. In the left pane, expand **Application Groups** and then **Foundation**, and then select the **Calculation Manager** application.

   b. In the right pane, expand **Planning**, and then select the **Planning** application that you want to migrate. Ensure that all artifacts of the application (Configuration, Essbase Data, Global Artifacts, Plan Type, Relational Data, and Security) are selected.

4. In the left pane, expand **Reporting and Analysis**, and then select the **Reporting and Analysis** application.

5. In the right pane, expand **Repository Objects**, and then do the following:

   • Select all Financial Reporting objects associated with the Planning application.

     Snapshot Report and Snapshot Book don't need to be associated with an application.

   • Select any third-party content; for example, documents and HTML files.

   • Expand **HRInternalFolder**, and then:

     – Select **DataSources**.

     – Expand **UserPOV**.

       There is a UserPOV for every combination of user and data source. Select the UserPOVs for the users that were migrated as part of the security model migration.

       For example, if Henry is an active user in Planning after migrating the security model from your on-premises environment to Planning, then select all the UserPOVs having `Henry` in the artifact name.

6. Select **Security**.

7. Select all Planning artifacts.

   a. In the left pane, expand **Application Groups** and then **Planning**.

   b. From the right pane, select all the artifacts.

8. Click **Export**.

9. In **Export to File System**, enter a directory (the default directory is `MIDDLEWARE_HOME/user_projects/epmsystem1/import_export/admin@native directory`) on the computer where Oracle Hyperion Foundation Services is installed.

10. Click **Export**.

The Migration Status Report is displayed. Review the report to ensure that all artifacts are migrated without errors. If the export fails, correct the reported errors and try again.

Zip and Upload the Exported Artifacts to the EPM Cloud Environment

If artifacts in your on-premises environment contain unicode characters, ensure that the artifacts are zipped from an environment in which the unicode characters are displayed correctly in the file system. If the artifact in the file system appears garbled, the artifact will fail to import into Planning.

> **Note:**
>
> The following steps apply to an on-premises Windows environment. You can perform equivalent steps for other platforms as well.

To zip the artifacts and upload the ZIP file to a service instance:

1. On the computer where Foundation Services is installed, navigate to the File System folder that stores the artifacts that you exported.

   The default export location is `MIDDLEWARE_HOME/user_projects/epmsystem1/import_export/admin@native directory`.

2. Select all the folders that were exported to the File System folder and zip up the contents using a third-party software such as 7-Zip:

   a. Right-click the exported folder, select 7-Zip, and then select **Add to Archive**.

   b. In **Add to Archive**, right-click the selected folders and set the following information:

   - In **Archive**, change the name of the archive to **OnPremisesApplication**.

   - In **Archive Format**, select **Zip**.

   - In **Parameters**, enter `cu=on`, which preserves the Unicode paths and file names.

   c. Click **OK**.

3. Using the uploadFile EPM Automate command, upload the ZIP file to your Oracle Enterprise Performance Management Cloud environment. You use the following sequence of commands to upload the file:

   ```
   epmautomate login example_admin example_password/password_file example_url
   ```

   ```
   epmautomate uploadfile OnPremisesApplication.ZIP
   ```

   The upload process may take a few minutes to complete.

   You may also upload using Migration. See Uploading Archives to the Service.

Import Planning Artifacts

> **Note:**
>
> A Planning environment supports only one Planning application. Delete any existing application from the environment before importing artifacts. For information on deleting an application, see Removing an Application in *Administering Planning*.

A Service Administrator can use these methods to import artifacts:

- Use importSnapshot EPM Automate command. You use the following sequence of commands to sign in to an environment and import a snapshot:

  ```
  epmautomate login example_admin example_password/password_file example_url

  epmautomate importSnapshot OnPremisesApplication
  ```

- Use Migration.

To import artifacts into a environment using Migration:

1. From a browser, sign in to the Planning environment as a Service Administrator.

2. Click ▤ (Navigator) and then **Migration**.

3. Click **Snapshots**.

4. Click ••• (Actions) in the row of the snapshot (for example, `OnPremiseApplication`) that you uploaded, and then select **Import**.

5. In **Import**, click **OK**.

   The Migration Status Report is displayed. Refresh the report until the migration is complete.

Validate and Troubleshoot

During imports, check the Migration Status Report to ensure that the import into the Oracle Enterprise Performance Management Cloud environment was error free. If errors are reported, take corrective actions and then reimport artifacts.

To validate that migration of Planning was successful, do these checks in Planning:

- Validate that Essbase data migrated correctly.

- Open a Planning data form and compare it with a data form from the source environment.

- Open a data form that contains driver data and compare it with a data form from the source environment.

- Verify that dimensions and task lists were migrated. Verify that the dimensions exist and contain the correct members.

- Verify that you can view the Financial Reporting reports associated with the application.

Migrate Essbase Artifacts

Substitution variables and rules deployed in the on-premises Planning application are migrated along with other artifacts.

If the following artifacts were added directly to Oracle Essbase, you must manually recreate them in Planning:

- Essbase calculation scripts. See Migrating Calculation Scripts

- Essbase report scripts. See Migrating Report Scripts

- Essbase data rule files. See Migrating Data Load Rule Files

These artifacts cannot be migrated to Oracle Enterprise Performance Management Cloud:

- Partition definition between the Essbase cubes

- Custom settings specified in the Essbase configuration file; for example, cache setting for cube
- Linked reporting objects

Migrating Calculation Scripts

This section applies only if the on-premises application uses Calculation scripts that were created directly in Oracle Essbase.

Export calculation scripts from on-premises Essbase applications and use it as a reference while creating business rules in Planning.

See Creating a Business Rule in *Designing with Calculation Manager for Oracle Enterprise Performance Management Cloud*.

To recreate on-premises calculation scripts as business rules:

1. From a browser, sign in to the Planning environment as a Service Administrator.
2. In the Navigator, click **Rules** under **Create and Manage**.

   Calculation Manager opens.
3. Expand **Planning**, then the application, and then the cube for which you want to create the rule.
4. Right-click **Rules**, and then select **New**.
5. In **New Rule** enter the rule name, which should match the name of the script you are recreating as rule.
6. From the on-premises Essbase script, copy script content.
7. Paste the script content into the Script Editor.
8. Click **Save**.
9. Deploy the new rule to Planning.

Migrating Report Scripts

A report script is used to export data from Oracle Essbase. Existing on-premises Essbase report scripts can be converted to Oracle Smart View for Office smart queries, which you can use for ad hoc reporting and analysis.

> **Note:**
>
> For detailed procedures, see Creating a Smart Query in *Oracle Smart View for Office User's Guide*

High-level steps involved in creating smart queries in place of Essbase report scripts :

- Move the members referenced in <ROW in the report script to the row layout of query
- Move the member selection under <COLUMN in report script to column layout of query
- Pick the POV members in query that are in <PAGE in report script
- Specify any suppress options that are in the report script, for example, SUPMISSINGROWS, SUPEMPTYROWS, using **Options** in the **Advanced Options** menu.

- Apply data format options in report script using SmartView data format, cell style or formatting options available in Microsoft Excel.

Migrating Data Load Rule Files

Convert Oracle Essbase rule scripts to data load mappings in Data Management.
See Creating File-Based Integrations in *Administering Data Integration for Oracle Enterprise Performance Management Cloud*.

Migrate Financial Management to Financial Consolidation and Close

- Supported Migration Paths
- Migrate Financial Management Metadata and Artifacts

Supported Migration Paths

You use the EPM Cloud Migration Accelerator to complete the migration process.

On-premises Financial Management

The on-premises instances that you are migrating to cloud must be on the latest available patch.

You can migrate the following releases of Oracle Hyperion Financial Management applications to Financial Consolidation and Close:

- Releases of 11.1.2.3
- Releases of 11.1.2.4

EPM Cloud

You can migrate applications from Financial Management to EPM Standard Cloud Service or EPM Enterprise Cloud Service environments.

Migrate Financial Management Metadata and Artifacts

You use the EPM Cloud Migration Accelerator to migrate Oracle Hyperion Financial Management artifacts and data to Financial Consolidation and Close. This tool, and supporting documentation, is available from Oracle Support.

To download the EPM Cloud Migration Accelerator and documentation:

1. From a browser, navigate to Oracle Support and sign in.
2. Search for document 2420798.1. The search feature is at the top right corner of the page.

   HFM To EPM Cloud Migration Accelerator (Doc ID 2420798.1) is displayed.
3. Click the **EPM Cloud Migration Accelerator (ECMA)** link in **ACTIONS**.
4. In **Patch Details**, click **Download**.
5. In **File Download**, click **p28352563_111240_Generic.zip** and save it to a local directory.
6. Using a third party utility such as 7-Zip, extract the contents of `p28352563_111240_Generic.zip`.
7. Open **User Documentation** within the directory where you extracted `p28352563_111240_Generic.zip`.

8. Use the instructions in the following documents to migrate Financial Management metadata, data, and artifacts.

  • *Migrating to EPM Cloud from Hyperion Financial Management (HFM).pptx*, which presents an overview of the migration process.

  • *Whitepaper - HFM to EPM Cloud - 18 08-V5.docx*, which contains step-by-step migration instructions.

  • *EcmaUserGuide.docx*, which explains how to use the EPM Cloud Migration Accelerator.

Migrate Financial Close Management to Account Reconciliation

  • Supported Migration Paths

  • Export Financial Close Management Artifacts

  • Upload Artifacts to Account Reconciliation

  • Create Application

  • Import Artifacts into Account Reconciliation

  • Validate and Troubleshoot

Supported Migration Paths

The Oracle Hyperion Financial Close Management instances that you are migrating to Account Reconciliation must be on Release 11.1.2.4.250 and later.

Export Financial Close Management Artifacts

To export Oracle Hyperion Financial Close Management artifacts from the on-premises deployment:

1. In the on-premises deployment, log in as a Shared Services Administrator.

2. Select **Navigate**, **Administer**, and then **Shared Services Console**.

3. In the left pane, expand **Application Groups**, then **Financial Close Management**, and then **Financial Close Management**.

4. In the right panel, expand **Common** and select the following artifacts:

  • Calendars

  • Currencies

  • Holiday Rules

  • Organizational Units

  • Teams

  • Optionally, select the Report Groups, Report Queries, and Reports specific to Account Reconciliation Manager.

> **✎ Note:**
>
> Do not include any report objects if exporting from an on-premises environment using MSSQL database. Reports from MSSQL will not work in Account Reconciliation since the Cloud environment uses an Oracle database only. Report queries are specific to database.

5. Select the root node, **Reconciliation Manager** which selects everything underneath it.

6. Click **Export** and then specify a name for the export file.

7. Wait for the export to finish and then check if the export had any errors you need to fix.

8. Under **File System**, right-click the exported file and select **Download**. Then save the file locally.

   A ZIP archive containing the exported files is created. You import this snapshot into Account Reconciliation in the next step.

Upload Artifacts to Account Reconciliation

In the preceding step, you exported Oracle Hyperion Financial Close Management artifacts to create a snapshot in a location of your choice. Upload this snapshot to Account Reconciliation.

Use the uploadFile EPM Automate command to upload the snapshot to your Account Reconciliation environment. You use the following sequence of commands to upload the snapshot:

```
epmautomate login example_admin example_password/password_file example_url

epmautomate uploadfile SNAPSHOT_NAME
```

Be sure to specify the fully-qualified path to the snapshot if it is not in the directory from where you are running the EPM Automate. The upload process may take a few minutes to complete.

You may also upload using Migration. See Uploading Archives to the Service.

Create Application

To create an Account Reconciliation application:

1. From a browser, sign in to the Account Reconciliation environment as a Service Administrator.

2. Click **Start**.

3. Click (New).

   Account Reconciliation Home page opens.

Import Artifacts into Account Reconciliation

> **✎ Note:**
>
> Your Account Reconciliation environment must not have data or a sample application existing when you try to import.

To import artifacts to an Account Reconciliation environment:

1. From a browser, sign in to the Account Reconciliation environment as a Service Administrator.

2. Click **Tools**, and then **Migration**.

3. Click **Snapshots**.

   The snapshot that you previously uploaded (for example, `OnPremiseApplication`) is listed in **Snapshots**. Since there are interdependencies between the artifacts you import, the import must be performed in a series of steps.

4. Expand the snapshot, then click the application link.

5. Select the **Common** node, and then click **Import**.

6. In **Import**, click **OK**.

   The Migration Status Report is displayed. Refresh and review the report until the migration is complete.

7. From the snapshot, select everything under **Reconciliation Manager** except the following:

   • **Profiles**

   • **Reconciliations**

8. Click **Import**.

9. In **Import**, click **OK**.

   The Migration Status Report is displayed. Refresh and review the report until the migration is complete.

10. From the snapshot, select the following under **Reconciliation Manager**:

    • **Profiles**

    • **Reconciliations**

11. Click **Import**.

12. In **Import**, click **OK**.

    The Migration Status Report is displayed. Refresh and review the report until the migration is complete.

Validate and Troubleshoot

During imports, check the Migration Status Report to ensure that the import into the Account Reconciliation environment was error free. If errors were reported, take corrective actions and then reimport artifacts.

After imports are complete, sign in to Account Reconciliation and validate that the data migrated correctly:

• Check that the Periods are set up correctly.

• Use either **Worklist** or **Reconciliations** to view the Reconciliations for a specific period.

• Open a few of the Reconciliations and check that the assignments, work and history are correct.

• Check that Formats, Attributes, Organizations and other objects all appear correctly.

• Sign in as a user and check that access to the Reconciliations is correct.

Migrate On-premises Profitability and Cost Management to Profitability and Cost Management

- Supported Migration Paths
- Export Profitability and Cost Management Artifacts
- Upload the Template File to Profitability and Cost Management
- Import the Template File into Profitability and Cost Management

Supported Migration Paths

You can migrate only Release 11.1.2.4.x Oracle Hyperion Profitability and Cost Management instances to Profitability and Cost Management.

On-premises Profitability and Cost Management can be migrated to EPM Enterprise Cloud Service environments only.

Export Profitability and Cost Management Artifacts

Profitability and Cost Management supports only Management Ledger applications.

In the on-premises environment, use one of the following to create a template file that you can upload to Profitability and Cost Management:

- Use the Standard to Management Ledger Migration Utility to export artifacts of Oracle Hyperion Profitability and Cost Management Standard Profitability applications to a template file.
  For instructions, see Using the Standard to Management Ledger Migration Utility.

- Use the **Export Template** command of Profitability and Cost Management to package Management Ledger applications in a form that can be imported into Profitability and Cost Management.
  For instructions, see Using the Export Template Command.

Using the Standard to Management Ledger Migration Utility

Use the Standard to Management Ledger Migration Utility for preparing a Detailed Profitability application for migration to an Profitability and Cost Management environment.

> **✎ Note:**
>
> This utility is available only for Oracle Hyperion Profitability and Cost Management installations that use the Oracle Database.

The utility creates a template ZIP file that can be imported as a new Management Ledger application into Profitability and Cost Management. It contains the dimension metadata, point-of-view (POV) definitions, and application preferences from the Standard Profitability application. It also contains placeholder Management Ledger rule sets and rules, derived from the standard application stages and rules, to provide a framework that must be filled out manually to complete the migration process.

The Standard to Management Ledger Migration Utility uses a PL/SQL procedure to extract the information from the Standard Profitability application into files on a server. The PL/SQL procedure requires that you first create an Oracle directory object, which is used to access the operating system on the database server and write the files. Next, you copy these files to any Microsoft Windows-based client computer, where you run a batch (BAT) file to prepare and package them into a Management Ledger template ZIP file. Finally, you can import the template file into a new Management Ledger application in the Cloud.

Steps are as follows:

1. Extract the utility files from the ZIP file that contains them.

   Open the `P28048630_111240_Generic.zip` patch file and extract these two files: `sptomlextract.sql`, `sptomltemplate.bat`

   Within the Zip file, they are located in the following folder:

   `HPCM_11_1_2_4_128_28048630\files\products\Profitability\database\Common\Oracle`

2. Create an Oracle `directory` database object to specify the location on the database server where the migration files are to be written:

   a. In Oracle SQL Developer or SQL Plus, connect to a user that has the `create any directory` privilege and execute this command:

      ```
      create or replace directory EXTRACT_DIR as '<directory path where you want
      the migration files written>';
      ```

      For example, to write them to the `D:\Migration_Extract` directory on a Windows server:

      ```
      create or replace directory EXTRACT_DIR as 'D:\Migration_Extract';
      ```

   b. Grant all privileges on that directory to the Profitability and Cost Management product schema owner:

      ```
      grant all on directory EXTRACT_DIR to <Profitability and Cost Management
      schema owner>;
      ```

      For example, if the Profitability and Cost Management schema owner is `HPCM1`, you would use this command:

      ```
      grant all on directory EXTRACT_DIR to HPCM1;
      ```

3. Create the migration utility PL/SQL package:

   From Oracle SQL Developer or SQL Plus, as the Profitability and Cost Management product schema owner, run the `sptomlextract.sql` script. This creates and compiles the HPM_SP_TO_ML_PKG PL/SQL package.

4. Run the migration utility to extract information from the Standard Profitability application into files on the database server:

   Run this command from Oracle SQL Developer or SQL Plus:

   ```
   exec HPM_SP_TO_ML_PKG.ExtractAll('<appName>');
   ```

   For example, for application name "BksSP82", you would use this command:

   ```
   exec HPM_SP_TO_ML_PKG.ExtractAll('BksSP82');
   ```

   The migration files are created in the directory you specified in step 2.

5. Copy the migration files to any Microsoft Windows client or server.

If the Oracle Database instance is not installed on a Microsoft Windows system, copy the generated migration files to any Windows system. Also copy the `sptomltemplate.bat` file to that location.

6. Generate the Management Ledger template ZIP file:

   On the Microsoft Windows computer, run the `sptomltemplate.bat` script to prepare and package the migration files into a Management Ledger template ZIP file, using this command:

   `sptomltemplate.bat <directory path where you copied the migration files>`

   For example, if you copied the migration files to D:\Migration_Template on the Windows server, the command is:

   `sptomltemplate.bat D:\Migration_Template`

   This step generates a template file called `SPtoML_Template.zip` in the same folder.

Using the Export Template Command

The migration of an Oracle Hyperion Profitability and Cost Management application to Profitability and Cost Management includes the following:

- Dimensions, whether file-based or managed in Oracle Hyperion EPM Architect or an Oracle Essbase cube

- Rules and rule sets

- Queries and model views

- POV settings

- Optionally, input values but not calculated values

No content outside of the Management Ledger application is included. For example, reports produced using Financial Reporting are not included.

To export artifacts using the Export Template Command:

1. In the on-premises deployment, log into Profitability and Cost Management as an Administrator.

2. Click **Actions**, and then **Export Template**.

3. In **Export Template**, enter an **Export File Name**, for example, `OnPremises_ML_templates`, and then indicate whether to **Include Input Data**.

4. Click **OK** to start the export. You can track progress in the **Job Library**.

Upload the Template File to Profitability and Cost Management

Using the uploadFile EPM Automate command, upload the template (`SPtoML_Template.zip`) to the Profitability and Cost Management environment.

You may also use the File Explorer to upload and import templates. See Transferring Files with the File Explorer in *Administering Profitability and Cost Management.*

To upload files using the `uploadfile` command:

1. sign in to the Profitability and Cost Management environment as a Service Administrator:

   `epmautomate login example_admin example_password/password_file example_url`

2. Run the uploadFile command:

```
epmautomate uploadfile OnPremises_ML_templates.zip profitinbox
```

```
epmautomate uploadfile "D:\Migration_Template\SPtoML_Template.zip" profitinbox
```

See Using the Standard to Management Ledger Migration Utility or Using the Export Template Command to identify the location of the template file.

3. Sign out:

```
epmautomate logout
```

Import the Template File into Profitability and Cost Management

Use the **Profitability Applications Console** to import templates from the archive (for example, from `OnPremises_ML_templates.zip` that you uploaded in the preceding step). You may also use the File Explorer to upload and import templates. See Transferring Files with the File Explorer in *Administering Profitability and Cost Management.*

To import templates:

1. From a browser, sign in to the Profitability and Cost Management environment as a Service Administrator.

2. Click **Application**, and then **Application** again to open the Profitability Application Console.

3. On **Application**, click ➕ (Create), and then select **Import Template**.

4. Click **Select File**, and then select **Server** as the location of the file.

   Select **Client** as the location if you want to upload the template archive using the File Explorer.

5. Browse to select the template archive, for example, `OnPremises_ML_templates.zip`.

6. Click **OK**.

Migrating On-premises Management Ledger Applications to Enterprise Profitability and Cost Management

You can migrate only Release 11.1.2.4.x Management Ledger applications to Enterprise Profitability and Cost Management. This migration involves these steps:

- Package the Management Ledger application in a form that can be imported into Profitability and Cost Management using the **Export Template** command of Oracle Hyperion Profitability and Cost Management. For instructions, see Using the Export Template Command.

- Upload the package from the preceding step to Profitability and Cost Management using the Cloud Migration template to create a Profitability and Cost Management application.

- Migrate the application from Profitability and Cost Management to Enterprise Profitability and Cost Management using the PCM to Enterprise Profitability and Cost Management Migration utility.

Your Goal	Watch This
Watch a video tutorial on Migrating from Profitability and Cost Management to Enterprise Profitability and Cost Management	Tutorial

Migrate Strategic Finance to Strategic Modeling

On-premises Oracle Hyperion Strategic Finance databases and consolidations cannot be migrated as is to Oracle Enterprise Performance Management Cloud; you must migrate individual entities and templates. Other Strategic Finance artifacts such as data maps and entity change management and assumption change management documents are recreated manually in Strategic Modeling.

- Supported Migration Path
- Prepare Strategic Finance Models and Templates for Migration
- Migrate Offline Models to Strategic Modeling
    - Migrating Offline Strategic Finance Models to Strategic Modeling Using a Browser
    - Migrating Offline Strategic Finance Models to Strategic Modeling Using Smart View
- Importing Strategic FinanceTemplates into Strategic Modeling (Optional)
- Enable Migrated Models and Templates in Strategic Modeling
- Build Consolidation Hierarchy

Supported Migration Path

You can migrate Oracle Hyperion Strategic Finance entities and templates from Strategic Finance Release 11.1.2.4.002 only.

If you are using an earlier version of Strategic Finance, upgrade your on-premises deployment to Release 11.1.2.4.002 to ensure that entities and templates are in a file format that can be converted for use with Strategic Modeling.

Prepare Strategic Finance Models and Templates for Migration

You migrate each Oracle Hyperion Strategic Finance model and template separately. The Take Offline feature of Oracle Smart View for Office enables you to quickly save entities and templates as local ALC files that can be migrated to Strategic Modeling.

It is not required to migrate template files to Strategic Modeling unless you want to maintain a copy of the template that was used to create the model in Strategic Finance.

Use the following procedure to create individual ALC files for each entity that you want to migrate. The ALC files are stored in `EPM_ORACLE_HOME`\products\hsf\Client\offline \`server_hostname`\`database_name` directory (generally, `Oracle\Middleware \EPMSystem11R1\products\hsf\Client\offline\`server_hostname`\`database_name`) on the computer where Strategic Finance is deployed.

To take models and templates offline using Smart View:

1. From Smart View, connect to the Strategic Finance instance from which you want to migrate entities and templates.

2. In Smart View, right-click the Strategic Finance database node, and then select **Take Offline**.

    The Take Offline utility is displayed.

3. Complete these steps in the Take Offline utility:

    a. Select the models to take offline.

b. Make sure that the **Check Out** checkbox is not selected.

c. Click **Next**.
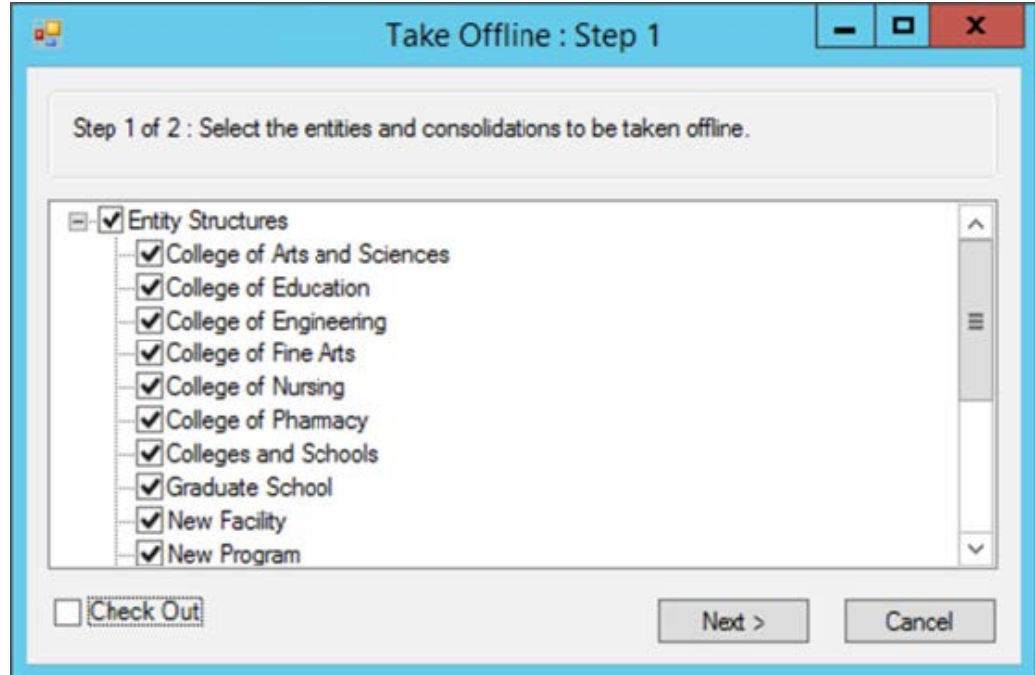
d. Verify the list of models that will be taken offline. The models and templates listed in this screen will be saved as ALC files.

e. Click **Finish**.
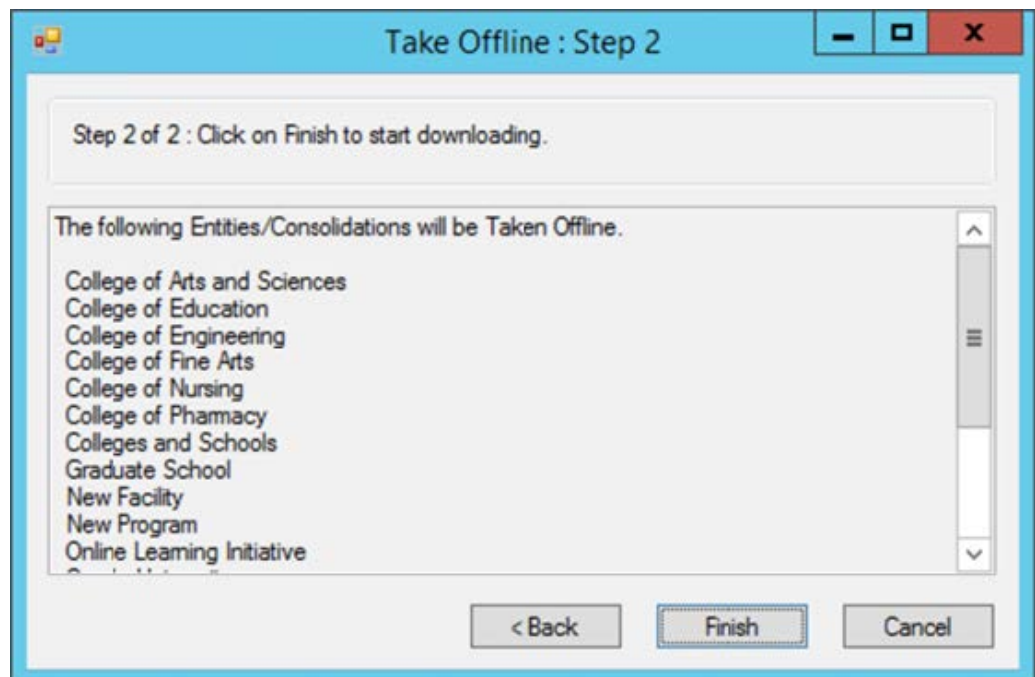
4. Wait a while for the process to finish. Click **OK** when the process of taking models off line is reported as complete.

Create a Planning ModulesApplication in EPM Cloud and Enable Strategic Modeling

Use the Oracle Hyperion Strategic Finance models (ALC files) that you took offline to create models in Strategic Modeling.

Before you can create models, you must create a Planning Modules application in Oracle Enterprise Performance Management Cloud and enable Strategic Modeling. See these information sources in *Administering Planning Modules*:

- Creating an Application
- Enabling Strategic Modeling

Migrate Offline Models to Strategic Modeling

You may use Oracle Enterprise Performance Management Cloud screens or Oracle Smart View for Office to create Strategic Modeling models based on the Oracle Hyperion Strategic Finance models that you took offline.

When you migrate a model, all model artifacts, such as POVs and reports, are migrated to the new model in Strategic Modeling.

- Migrating Offline Strategic Finance Models to Strategic Modeling Using a Browser
- Migrating Offline Strategic Finance Models to Strategic Modeling Using Smart View

Migrating Offline Strategic Finance Models to Strategic Modeling Using a Browser

You migrate an offline Oracle Hyperion Strategic Finance model by using it as the source while creating a Strategic Modeling model.

To migrate an offline Strategic Finance model:

1. Access Strategic Modeling as a Service Administrator.
2. Create a model. See Creating a Strategic Modeling Model in *Administering Planning Modules* for detailed instructions.

> **✎ Note:**
>
> While creating the model, on **Create New Model: General**, be sure to select the following:
>
> - In **Create Model From**, select **Local File**.
> - In **Select File**, select one of the previously prepared Strategic Finance model (ALC) file.
>
>   The default location of the Strategic Finance model files that you take offline is `EPM_ORACLE_HOME\products\hsf\Client \offline\server_hostname\database_name` directory (generally, `Oracle \Middleware\EPMSystem11R1\products\hsf\Client\offline \server_hostname\database_name`) on the computer where Strategic Finance is deployed.

3. Enter other required settings for the model.

   You may choose to keep the time structure and source model data from the Strategic Finance model that is being used as the source. If you opt not to use the source model data, you can choose a different currency and currency unit. Similarly, you can place the model at root model to build a model hierarchy or deselect the **Place At Root** checkbox to add this model as a child of another model that you select in **Parent Model**.

4. Click **Next** to cycle through the remaining screens and specify additional settings. On **Review**, click **Create Model**.

5. Click **OK** to finish the process.

6. Repeat steps 3-6 for each model you want to migrate.

Migrating Offline Strategic Finance Models to Strategic Modeling Using Smart View

Using Oracle Smart View for Office, you can create Strategic Modeling models using offline Oracle Hyperion Strategic Finance models as the source.

To migrate an offline Strategic Finance model using Smart View Extension for Strategic Modeling:

When you migrate a model, all model artifacts, such as POVs and reports, are migrated to the new model in Strategic Modeling.

1. Using Strategic Finance, connect to the Oracle Enterprise Performance Management Cloud environment in which Strategic Modeling is enabled.

2. In the **Smart View** Panel on Strategic Modeling ribbon, expand the **Strategic Modeling** node.

3. Right-click **Model View** and then select **New Model**.

4. Create a model. See Creating a Model by Copying Another Model in *Working with Strategic Modeling in Smart View*.

> **Note:**
>
> While creating the model, on **Create New Model on Server**, be sure to select the following:
>
> In **Source**, select one of the previously prepared Strategic Finance model (ALC) file.
>
> The default location of the Strategic Finance model files that you take offline is `EPM_ORACLE_HOME\products\hsf\Client\offline\`*`server_hostname\database_ name`* directory (generally, `Oracle\Middleware\EPMSystem11R1\products\hsf\Client\offline\`*`server_ho stname\database_name`*) on the computer where Strategic Finance is deployed.

You may choose to keep the source model data from the offline Strategic Finance model that is being used as the source. If you opt not to use the source model data, you can, later on, choose a different currency and currency unit. Similarly, you can place the model at root model to build a model hierarchy or deselect the **Place At Root** checkbox to add this model as a child of an existing model that you select in **Parent Model**.
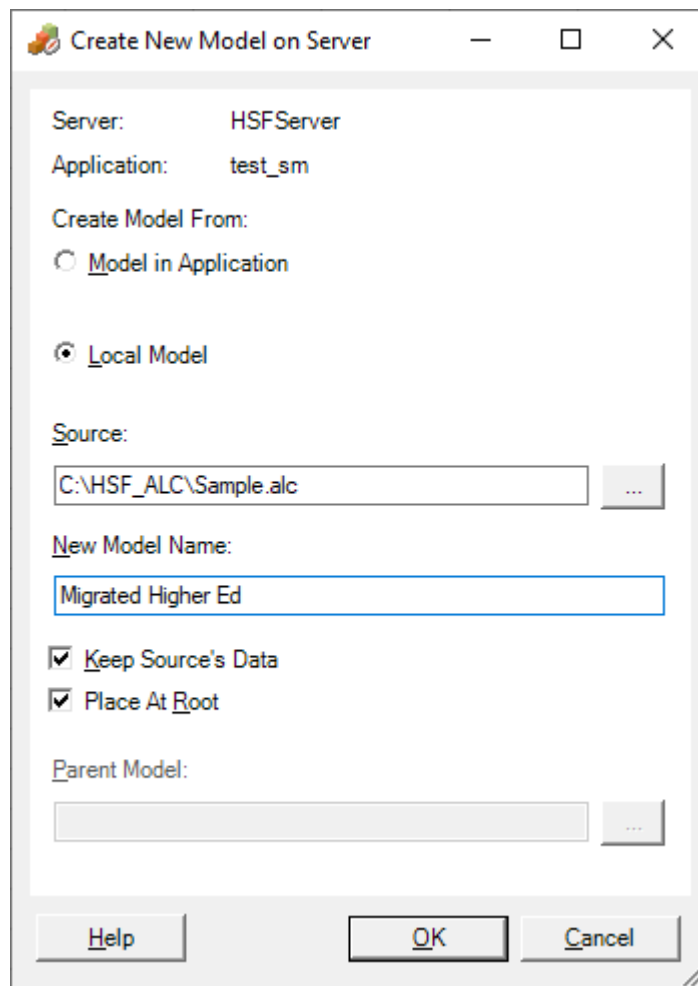
5. Click **OK**.

6. Repeat steps 3-5 for each model you want to migrate.

Importing Strategic FinanceTemplates into Strategic Modeling (Optional)

You use Oracle Smart View for Office to import Oracle Hyperion Strategic Finance templates into Strategic Modeling. This step is required only if you want to preserve the templates that you used to create the migrated models.

> **Note:**
>
> When you take a Strategic Finance model offline, the template that was used to create the model, if available on the server, is copied to the
> `EPM_ORACLE_HOME\products\hsf\Client\offline\`*`server_hostname`*`\`*`database_name`* directory (generally,
> `Oracle\Middleware\EPMSystem11R1\products\hsf\Client\offline\`*`server_hostname`*`\`*`database_name`*) on the computer where Strategic Finance is deployed. Template files are created as ALT files.

To import templates using Smart View:

1. Using Strategic Finance, connect to the Oracle Enterprise Performance Management Cloud environment in which Strategic Modeling is enabled.

2. In the Smart View Panel on Strategic Modeling ribbon, expand the Strategic Modeling node

3. Right-click **Templates** and then select **Import Template**.

4. In **Source Template**, select the template file you want to import.

5. In **Template Name**, enter a unique name for the template in Strategic Modeling.

6. Click **OK**.

7. Repeat this process for each template you want to migrate.

Enable Migrated Models and Templates in Strategic Modeling

The process of enabling the migrated models, their reports, and templates in Strategic Modeling involves checking out and then checking in the migrated models and templates. You use Oracle Smart View for Office Extension for Strategic Modeling to complete this process.

To check out and check in models:

1. Using Oracle Hyperion Strategic Finance Extension for Smart View, connect to the Oracle Enterprise Performance Management Cloud environment in which Strategic Modeling is enabled

2. In the **Smart View Panel** on the **Strategic Modeling** ribbon, expand the **Strategic Modeling** node.

3. Complete a step:

    a. To check out models, expand the **Model View** node.

    b. To check out templates, expand the **Templates** node.

4. Right-click the model or template that you want to check out and then select **Open-Check Out**.

    A checked out view of the model or template is displayed.

5. In the **Strategic Modeling** ribbon, click **Close**

    The Close Model screen is displayed.

6. In Close Model, select **Check in** as the close option and then click **OK**.

7. Repeat steps 3-6 for each model or template that you want to enable.

Build Consolidation Hierarchy

Consolidation hierarchies in Strategic Modeling represent the structure of your organization. You can include many models in your consolidation so that the data from those models only are included in the consolidated model. Consolidation helps determine how changing business unit conditions affect the earnings of the company to enable you to make informed decisions about business units.

For detailed instructions, see Creating and Running Consolidations in *Working with Planning Modules*.
To build a consolidation hierarchy:

1. Access Strategic Modeling as a Service Administrator.

2. Click **Consolidation View** and then **Add**.

3. Enter a name for the consolidation and then click ✔ (OK).

4. Click the name of the new consolidation to open it.

5. Click ➕ (Add) to list all existing models that you can add to the consolidation.

6. Drag and drop models into the consolidation.

7. Click Close when you are done.

Migrate Data Relationship Management to Oracle Enterprise Data Management Cloud

You can migrate data hierarchies from Oracle Data Relationship Management to Oracle Enterprise Data Management Cloud and then perform data management to facilitate on-going maintenance of enterprise data in the cloud.

Oracle Enterprise Data Management Cloud is a modern, cloud-based solution that takes a unique approach that is agile, incremental, and fit-for-purpose to promote the right-grain of data sharing of enterprise data across individuals, teams, departments and entities across the enterprise.

Broad migration steps include:

• Create an export file for each hierarchy within Data Relationship Management

• Register an application within Oracle Enterprise Data Management Cloud with dimensions from Data Relationship Management

• Use the export file from Data Relationship Management to import a dimension into the registered application in Oracle Enterprise Data Management Cloud

• Begin enterprise data maintenance using application views or build maintenance views to curate enterprise data by domain

For detailed instructions, see Migrating Enterprise Data from Data Relationship Management to Oracle Enterprise Data Management Cloud in *Administering and Working with Oracle Enterprise Data Management Cloud*.

Considerations for Migrating FDMEE-Based Applications

The following Oracle Hyperion Financial Data Quality Management, Enterprise Edition-based applications can be migrated from on-premises to Oracle Enterprise Performance Management Cloud:

• Planning

• Oracle Hyperion Profitability and Cost Management

The following artifacts cannot be migrated because these features are not supported in EPM Cloud:

• Scripts of any type, including event scripts, import scripts and custom scripts

• Custom reports

On-premises applications such as Planning, and Profitability and Cost Management support the loading of metadata and data using Financial Data Quality Management, Enterprise Edition. After migrating your application to EPM Cloud, you have the following two options to integrate data:

- Continue using your on-premises FDMEE deployment by leveraging the Hybrid integration and data load to EPM Cloud.

- Convert all integrations that use a direct connection to the source data system to a file-based integration using Data Management. To convert the direct integrations to file-based integrations you will need to do the following:

  – Develop a custom data extraction process to export the data from the source system to a delimited data file

  – Map the delimited data file and load it into the EPM Cloud application using Data Management

    See Creating File-Based Integrations in *Administering Data Integration for Oracle Enterprise Performance Management Cloud*.

    You can use the following EPM Automate command sequence to automate the process of uploading the data file and executing the integration:

    ```
    epmautomate login example_admin example_password/password_file example_url
    ```

    ```
    epmautomate uploadfile DELIMITED_FILE_NAME.txt inbox/repository
    ```

    ```
    epmautomate rundatarule AccountActual Mar-15 Jun-15 REPLACE STORE_DATA
    inbox/AccountActual.dat
    ```

    ```
    epmautomate logout
    ```

    See uploadFile EPM Automate Commands in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* for sample command usage and examples.

A
Role Mapping for Migrating to EPM Cloud

Predefined identity domain roles combine a number of on-premises roles. To ensure that an appropriate level of access is maintained after migration, grant the predefined role that encompasses all the access rights granted to the user in the on-premises application.

About Role Mapping

For example, assume that user `jdoe` has the following on-premises roles:

- Interactive User role of the Planning application that is being migrated
- LCM Administrator (Shared Services)
- Report Designer (Reporting and Analysis)

Of these roles, Interactive User and Report Designer are mapped to the Power User role of Oracle Enterprise Performance Management Cloud. However, because the LCM Administrator role is mapped to the Service Administrator predefined role, you should assign it to `jdoe`.

- Planning
- Financial Management
- Financial Close Management
- Profitability and Cost Management and Enterprise Profitability and Cost Management
- Data Relationship Management

Planning

If a user has on-premises Planning roles that differ from those listed in the following table, you must assign the user to the Service Administrator predefined role.

> **Note:**
>
> Reporting and Analysis was replaced with Document Repository in Release 11.1.2.4.900.

Table A-1   Planning to Planning Role Mapping

If user has only these on-premises roles	Assign the user to this predefined identity domain role
Planning • Ad Hoc Grid Creator • Approvals Ownership Assigner • Approvals Supervisor • Interactive User • Task List Access Manager **Reporting and Analysis** • Content Manager • Schedule Manager **Document Repository** (Release 11.1.2.4.900 only) • Viewer • Report Designer Scheduler • Security Administrator **Financial Data Quality Management** • Create Integration • Drill Through • GL Writeback • Run Integration **Essbase Analytic Services** Read	Power User
Planning • Ad Hoc User • Planner **Reporting and Analysis** Content Publisher **Document Repository** (Release 11.1.2.4.900 only) • Report Designer Scheduler • Viewer **Financial Data Quality Management** Drill Through	User
Planning View User **Reporting and Analysis** • Explorer • Viewer **Document Repository** Viewer	Viewer

Financial Management

Users who have the Application Administrator and Load System Oracle Hyperion Financial Management roles must be assigned to the Service Administrator predefined role.

Table A-2   Financial Management to Financial Consolidation and Close Role Mapping

If user has only these on-premises Financial Management roles	Assign the user to this predefined identity domain role
Inter-Company Transaction Admin	Power User
Rules Administrator	
Rules Designer	
Approve Journals	
Create Journals	
Create Unbalanced Journals	
Default	
Journals Administrator	
Post Journals	
Manage Templates	
Generate Recurring	
Review Supervisor	
Reviewer 1 through Reviewer 10	
Submitter	
Lock Data	
Unlock Data	
Consolidate All	
Consolidate	
Consolidate All with Data	
Run Allocation	
Run EquityPickUp	
Manage Data Entry Forms	
Manage Models	
Save System Report On Server	
Load Excel Data	
Inter-Company Transaction User	
Inter-Company Transaction Match Template	
Inter-Company Transaction Auto Match by Account	
Inter-Company Transaction Auto Match by ID	
Inter-Company Transaction Manual Match with Tolerance	
Inter-Company Transaction Manual Match	
Inter-Company Transaction Unmatch	
Inter-Company Transaction Post/Unpost	
Enable write back in Web Grid	
Database Management	
Manage Ownership	
Manage Custom Documents	
Extended Analytics	
Data Form Write Back from Excel	

Table A-2   (Cont.) Financial Management to Financial Consolidation and Close Role Mapping

If user has only these on-premises Financial Management roles	Assign the user to this predefined identity domain role
Consolidate	User
Consolidate All	
Consolidate All with Data	
Load Excel Data	
Inter-Company Transaction Auto Match by Account	
Enable write back in Web Grid	
Advanced User	Viewer
Rules Viewer	
Read Journals	
Receive Email Alerts for Process Control	
Receive Email Alerts for Intercompany	
Reserved	
View Data Audit	
View Task Audit	
Dashboard Viewer	

Financial Close Management

If a user has on-premises Oracle Hyperion Financial Close Management roles that differ from those listed in the following table, you must assign the user to the Service Administrator predefined role.

Table A-3   Financial Close Management to Account Reconciliation Role Mapping

If user has only these on-premises roles	Assign the user to this predefined identity domain role
Financial Close Management	Power User
• Reconciliation Power User	
• Reconciliation Preparer	
• Reconciliation Reviewer	
• Reconciliation Commentator	
• Reconciliation Viewer	
Reporting and Analysis	
• Analyst	
• Explorer	
• Report Designer	
• Schedule Manager	
Financial Data Quality Management	
• Drill Through	
• Create Integration	
• Run Integration	
• GL Writeback	

Table A-3   (Cont.) Financial Close Management to Account Reconciliation Role Mapping

If user has only these on-premises roles	Assign the user to this predefined identity domain role
Financial Close Management • Reconciliation Preparer • Reconciliation Reviewer • Reconciliation Commentator • Reconciliation Viewer **Financial Data Quality Management** Drill Through	User
Financial Close Management Reconciliation Viewer **Reporting and Analysis** • Viewer • Explorer **Financial Data Quality Management** Drill Through	Viewer

Profitability and Cost Management and Enterprise Profitability and Cost Management

If a user has on-premises Profitability and Cost Management roles that differ from those listed in the following table, you must assign the user to the Service Administrator predefined role.

Table A-4   Profitability and Cost Management to Profitability and Cost Management Role Mapping

If user has only these on-premises roles	Assign the user to this predefined identity domain role
Profitability and Cost Management Power User **Reporting and Analysis** • Analyst • Explorer • Report Designer • Schedule Manager **Document Repository** (Release 11.1.2.4.900 only) • Viewer • Report Designer Scheduler • Security Administrator **Financial Data Quality Management** • Drill Through • Create Integration • Run Integration • GL Writeback **Essbase Analytic Services Roles** • Start/Stop Application • Database Manager	Power User
Profitability and Cost Management Interactive User **Financial Data Quality Management** Drill Through **Reporting and Analysis** Content Manager **Document Repository Roles** (Release 11.1.2.4.900 only) • Report Designer Scheduler • Viewer **Essbase Analytic Services** Filter	User
Profitability and Cost Management View User **Document Repository** (Release 11.1.2.4.900 only): Viewer **Reporting and Analysis:** • Viewer • Explorer **Essbase Analytic Services** Filter	Viewer

Data Relationship Management

These on-premises roles are not applicable in Oracle Enterprise Performance Management Cloud, and should not be mapped to predefined roles

• Analytics User

• Anonymous User

- Governance Manager

- Workflow User

Table A-5   Data Relationship Management to Oracle Enterprise Data Management Cloud Role Mapping

If user has only these Oracle Data Relationship Management roles	Assign the user to this predefined identity domain role
• Access Manager • Provisioning Manager • Application Administrator • LCM Administrator	Service Administrator
• Data Creator • Data Manager • Governance User • Interactive User	User