



ORACLE® HYPERION ENTERPRISE
PERFORMANCE MANAGEMENT SYSTEM
HYPERION® SHARED SERVICES
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FIRST TIME LIFECYCLE
MANAGEMENT MIGRATIONS

ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

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About Lifecycle Management Migrations

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

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

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

Generally, the Lifecycle Management interface is consistent for all EPM System products that support Lifecycle Management. However, EPM System products display different artifact listings and export and import options in the Lifecycle Management interface.

Note: Lifecycle Management also provides a command-line utility (called Lifecycle Management Utility) that provides an alternate way to migrate artifacts from source to destination. For information about Lifecycle Management Utility, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

This document describes, at a high-level, the first-time Lifecycle Management migration process for these EPM System products:

- Oracle Hyperion Financial Management, Fusion Edition
- Oracle Essbase
- Oracle Hyperion Planning, Fusion Edition
- Oracle's Hyperion Reporting and Analysis

For detailed information about using Lifecycle Management and for a listing of Lifecycle Management artifacts and export and import options by product, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Note: The first-time Lifecycle Management migration process described in this document is applicable for situations when a fresh destination environment is being set up. For migrations where the destination environment already exists (including migrating directly from one application to another), follow the instructions provided in the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Financial Management

Financial Management consists of artifacts from various products. For example:

- Oracle's Hyperion® Shared Services users, groups, provisioning artifacts, and taskflows

- Oracle Hyperion EPM Architect, Fusion Edition, Hyperion Calculation Manager, and data synchronization artifacts for Performance Management Architect-enabled Financial Management applications
- Financial Management artifacts
- Oracle Hyperion Financial Reporting, Fusion Edition

Since Financial Management artifacts span multiple products, it is necessary to migrate the artifacts for each product as it relates to the Financial Management application.

Note: Lifecycle Management does not currently support migration of data.

In this section:

- [“Financial Management Migration Prerequisites” on page 3](#)
- [“Financial Management Migration Process” on page 3](#)
- [“Moving Financial Management Data” on page 7](#)

Financial Management Migration Prerequisites

- Install and configure Financial Management and all related EPM System products (such as Shared Services, Performance Management Architect, Financial Reporting, and so on). See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.
- Ensure the Financial Management application metadata is loaded.
- Users performing Lifecycle Management operations for Financial Management must be assigned the following roles:
 - LCM Administrator
 - Application Administrator

To assign roles, see *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

- For Financial Management Classic applications, create a shell Financial Management Classic application on the destination environment.

See the Financial Management product documentation for instructions.

Financial Management Migration Process

This section provides a high-level process for a first-time Financial Management application migration. For detailed migration procedures, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Note: The Oracle Technology Network provides the most recent product documentation for the current release. See <http://www.oracle.com/technology/documentation/index.html>.

Financial Management migration process:

1. Export the application artifacts to the file system.
See [“Exporting a Financial Management Application to the File System” on page 4.](#)
2. Copy the application artifacts from the file system to the destination environment file system.
See [“Copying Financial Management Application Artifacts to the Destination Environment” on page 5.](#)
3. Import the application artifacts from the destination environment file system to the destination application.
See [“Importing a Financial Management Application from the File System” on page 5.](#)

Note: For Performance Management Architect-enabled Financial Management applications, you must first migrate and deploy the Performance Management Architect dimensions.
4. Move the Financial Management data.
See [“Moving Financial Management Data” on page 7.](#)

Exporting a Financial Management Application to the File System

- To export a Financial Management application to the file system
 - 1 Launch **Shared Services Console** and log in as the user who is provisioned with the appropriate **Lifecycle Management** roles. For roles, see [“Financial Management Migration Prerequisites” on page 3.](#)
 - 2 In **Shared Services Console**, select the following artifacts for a **Financial Management** application migration:
 - Any **Native Directory** and **Taskflows** artifacts that pertain to the **Financial Management** application. For example, **Native Directory Users**, **Groups**, and **Assigned Roles**.

Note: Select assigned roles for all products that contain artifacts for **Financial Management**.
 - All of the artifacts in the **Financial Management** application you are migrating. For example, **Comma**.
 - For a **Performance Management Architect**-enabled **Financial Management** application, the **Performance Management Architect** artifacts for the **Financial Management** application you are migrating. For example, **Comma**.
 - The **Reporting and Analysis Financial Reporting** artifacts. For example, **HFM Comma Reports**.
 - 3 In **Shared Services Console**, select the **Selected Artifacts** tab to review the artifacts that you selected for the **Financial Management** application migration.
 - 4 Click **Define Migration** and define the migration as follows:
 - a. Select the **Shared Services** artifacts (for example, **Foundation\Shared Services**) and specify the file system folder where the **Shared Services** artifacts will be exported.

- b. For a Performance Management Architect-enabled Financial Management application, select the Performance Management Architect application (for example, **Foundation \EPM Architect**) and specify the file system folder where the Performance Management Architect artifacts will be exported.
 - c. Select the Reporting and Analysis application (for example, **Reporting and Analysis \Reporting and Analysis**), select **Export with Job Output** if you want that information to be migrated, and then specify the file system folder where the Reporting and Analysis Financial Reporting artifacts will be exported.
 - d. Finally, select the Financial Management application (for example, **HFM\Comma**) and specify the file system folder where the Financial Management artifacts will be exported.
- 5 **Save the migration definition.**
 - 6 **Execute the migration.**
 - 7 **Review the Migration Status Report to ensure the migration is completed successfully.**

Copying Financial Management Application Artifacts to the Destination Environment

The application artifacts that exist on the file system must be moved to the destination environment file system. This can be accomplished using File Transfer Protocol (FTP), burning them to a DVD, or using another transfer method.

Note: The default file system location for Lifecycle Management artifacts is on the Shared Services Web application server computer at `HYPERION_HOME/common/import_export/username@ProviderName/`.

- To copy Financial Management application artifacts to the destination environment:
 - 1 **Navigate to the file system location where the application artifacts currently reside. For example, **Comma - EPMA artifacts, Comma - FM artifacts, Comma - FR artifacts, Comma - HSS artifacts.****
 - 2 **Copy and paste the folders from the file system location to the transfer medium (DVD, FTP, or another transfer method).**
 - 3 **On the destination environment, copy the folders from the transfer medium to the file system location.**

Note: Ensure the files are copied to the user directory on the destination file system for the user who will be performing the migration from the file system. If they are copied to a directory for a different user, the user performing the migration will not see the files under the File System application group in Shared Services Console.

Importing a Financial Management Application from the File System

Financial Management application artifacts must be loaded in the following order:

1. Security:

- a. Security Class
 - b. Security Class Access
 2. Dimensions
 3. Member Lists
 4. Rules
 5. Folders (Documents directory)
 6. Phased Submission
 7. Related Content (Documents directory)
 8. Journal Groups (Journals directory)
 9. Custom Documents (Documents directory)
 10. Data Explorer Reports (Documents directory)
 11. Links (Documents directory)
 12. Tasklists (Documents directory)
 13. Web Grids (Forms directory)
 14. IC Matching by Account (InterCompany directory)
 15. ICT Matching Templates (InterCompany directory)
 16. ICT System Reports (InterCompany directory)
 17. Journal System Report (Journals directory)
 18. Web Forms (Forms directory)
 19. IC Matching by Trans ID (InterCompany directory)
 20. ICT Reason Codes (InterCompany directory)
 21. Journal Templates (Journals directory)
- To import a Financial Management application from the file system:
- 1** **Back up the destination environment. See the *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*.**
 - 2** **On the destination environment, launch Shared Services Console and log in as the user who is provisioned with the appropriate Lifecycle Management roles. For roles, see [“Financial Management Migration Prerequisites” on page 3](#).**
 - 3** **If importing a Performance Management Architect-enabled Financial Management application, follow these steps:**
 - a. Navigate to the **File System** application group in the View pane and select the Performance Management Architect file system artifacts that are applicable to the Financial Management application. For example, **Comma**.
 - b. Click **Define Migration** and define the migration as follows:
 - i. Select the destination application. For example, **EPM Architect**.

- ii. Select the **Dimension Import Mode (Merge or Replace)**, select **Deploy after Import**, then enter the remaining parameters to deploy the application view to a physical Financial Management application.

Once the Performance Management Architect application view is deployed successfully to Financial Management, you can import Financial Management artifacts into the application.

- c. Save the migration definition.
 - d. Execute the migration.
 - e. Review the Migration Status Report to ensure the migration is completed successfully.
- 4 Navigate to the **File System** application group in the View pane and select the **Financial Management Shared Services** artifacts, the **Financial Management** application artifacts, and the **Financial Management Financial Reporting** artifacts.
 - 5 Select the **Selected Artifacts** tab to review the artifacts that you selected.
 - 6 Click **Define Migration** and define the migration as follows:
 - a. Select the Shared Services artifacts (for example, **File System\Comma - HSS artifacts**), specify the Shared Services destination application where the Shared Services artifacts will be imported, and select the **Import Operation Type** and the number of **Max Errors Before Stopping Import**.
 - b. Select the Financial Management artifacts (for example, **File System\Comma - FM artifacts**), specify the destination Financial Management application where the Financial Management artifacts will be imported, and select the **Dimension Import Mode (Merge or Replace)** and the **Import Phased Submission Assignment Mode (Merge or Replace)**.
 - c. Select the Financial Reporting artifacts (for example, **File System\Comma - FR artifacts**), specify the Reporting and Analysis application where the Financial Reporting artifacts will be imported, and select **Exclude Job Output on Import** (if preferred).
 - 7 Save the migration definition.
 - 8 Execute the migration.
 - 9 Review the Migration Status Report to ensure the migration is completed successfully.

Moving Financial Management Data

Lifecycle Management does not facilitate data migration. To migrate an Oracle Hyperion Financial Management, Fusion Edition application from one database to another, see the instructions provided in the *Oracle Hyperion Financial Management Data Migration* white paper. This white paper is available for download from the Oracle Enterprise Performance Management/Business Intelligence White papers area of the Oracle Technical Network (OTN) Web site (<http://www.oracle.com/technology/products/bi/resource-library.html>).

Essbase

The Essbase database consists of artifacts from various products. For example:

- Shared Services users, groups, and provisioning artifacts
- Essbase artifacts
- Performance Management Architect artifacts
- Financial Reporting or Oracle's Hyperion® Web Analysis documents

Since Essbase database artifacts span multiple products, it is necessary to migrate the artifacts for each product as it relates to the Essbase database.

To use the Lifecycle Management feature with Essbase, the Essbase server must first be converted to Shared Services mode.

Note: Lifecycle Management does not currently support migration of data.

In this section:

- [“Essbase Migration Prerequisites” on page 8](#)
- [“Essbase Migration Process” on page 8](#)
- [“Moving Essbase Data” on page 13](#)

Essbase Migration Prerequisites

- Install and configure Essbase and all related EPM System products (such as Shared Services, Financial Reporting, and Web Analysis). See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.
- Ensure the Essbase database with all metadata is loaded.
- Users performing Lifecycle Management operations for Essbase must be assigned the following roles:
 - Shared Services role: LCM Administrator
 - Essbase Server role: Server Access
 - Essbase Application roles: Database Manager

To assign roles, see *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

- Ensure that Essbase security is synchronized with Shared Services using the `alter system resync sss MaxL` command. See the *Oracle Essbase Database Administrator's Guide* and the *Oracle Essbase Technical Reference*.

Essbase Migration Process

This section provides a high-level process for a first-time Essbase database migration. For detailed migration procedures, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Note: The Oracle Technology Network provides the most recent product documentation for the current release. See <http://www.oracle.com/technology/documentation/index.html>.

Essbase migration process:

1. Export the database artifacts to the file system.
See “[Exporting an Essbase Database to the File System](#)” on page 9.
2. Copy the application artifacts from the file system to the destination environment file system.
See “[Copying Essbase Database Artifacts to the Destination Environment](#)” on page 10.
3. Create an Essbase application in the destination environment.
See “[Creating an Essbase Application in the Destination Environment](#)” on page 11.
4. Modify the Shared Services security artifacts with the correct destination environment application group name.
See “[Modifying Security Artifacts Before Import](#)” on page 11.
5. Import the Essbase database artifacts from the destination environment file system to the destination application.
See “[Importing an Essbase Database from the File System](#)” on page 12.
6. Move the Essbase data.
See “[Moving Essbase Data](#)” on page 13.

Note: It does not matter whether data migration occurs before or after the Essbase artifact migration. However if an outline is migrated as part of the Essbase artifact migration, then data must be exported after that.

Exporting an Essbase Database to the File System

► To export an Essbase database to the file system:

- 1 **Launch Shared Services Console and log in as the user who is provisioned with the appropriate Lifecycle Management roles.** For roles, see “[Essbase Migration Prerequisites](#)” on page 8.
- 2 **In Shared Services Console, select the following artifacts for an Essbase database migration:**
 - Any Native Directory artifacts that pertain to the Essbase database. For example, Native Directory Users, Groups, and Assigned Roles.

Note: Select assigned roles for all products that contain artifacts for Essbase.

- All of the artifacts in the Essbase database you are migrating. For example, **Sample Basic**.

Note: The Essbase Server level also contains substitution variables that can be selected for migration.

- For a Performance Management Architect-enabled Essbase database, the Performance Management Architect artifacts for the Essbase database you are migrating. For example, **Basic**.
 - The Reporting and Analysis Financial Reporting artifacts. For example, **Sample Basic Reports**.
- 3 In **Shared Services Console**, select the **Selected Artifacts** tab to review the artifacts that you selected for the Essbase database migration.
 - 4 Click **Define Migration** and define the migration as follows:
 - a. Select the Shared Services application (for example, **Foundation\Shared Services**) and specify the file system folder where the Shared Services artifacts will be exported.
 - b. For a Performance Management Architect-enabled Essbase application, select the Performance Management Architect application (for example, **Foundation\EPM Architect**) and specify the file system folder where the Performance Management Architect artifacts will be exported.
 - c. Select the Essbase application (for example, **Essbase\Sample**) and specify the file system folder where the Sample Basic Essbase artifacts will be exported.
 - d. Finally, select the Reporting and Analysis application (for example, **Reporting and Analysis \Reporting and Analysis**), select **Export with Job Output** if you want that information to be migrated, and then specify the file system folder where the Reporting and Analysis Financial Reporting artifacts will be exported.
 - 5 Save the migration definition.
 - 6 Execute the migration.
 - 7 Review the Migration Status Report to ensure the migration is completed successfully.

Copying Essbase Database Artifacts to the Destination Environment

The database artifacts that exist on the file system must be moved to the destination environment file system. This can be accomplished using File Transfer Protocol (FTP), burning them to a DVD, or using another transfer method.

Note: The default file system location for Lifecycle Management artifacts is on the Shared Services Web application server computer at `HYPERION_HOME/common/import_export/username@ProviderName/`.

- To copy Essbase database artifacts to the destination environment:
 - 1 Navigate to the file system location where the database artifacts currently reside. For example, **Sample Basic - Essbase artifacts, Sample Basic - FR artifacts, Sample Basic - HSS artifacts, Sample Basic - EPMA artifacts**.
 - 2 Copy and paste the folders from the file system location to the transfer medium (DVD, FTP, or another transfer method).
 - 3 On the destination environment, copy the folders from the transfer medium to the file system location.

Note: Ensure the files are copied to the user directory on the destination file system for the user who will be performing the migration from the file system. If they are copied to a directory for a different user, the user performing the migration will not see the files under the File System application group in Shared Services Console.

Creating an Essbase Application in the Destination Environment

Prior to migrating an Essbase database, you must first create the Essbase application in the destination environment.

Note: You can skip this section if the Essbase application already exists in the destination environment.

For detailed application creation procedures, see the *Oracle Essbase Administration Services Online Help*.

- To create an Essbase application in the destination environment:
 - 1 **Launch Oracle Essbase Administration Services.**
 - 2 **Navigate to the Essbase Server and create an application using either aggregate storage or block storage.**
 - 3 **Enter the application name and select **Unicode mode**, if preferred.**
 - 4 **Click **OK**.**

Modifying Security Artifacts Before Import

Prior to importing the Shared Services security artifacts, you will need to modify the Essbase Assigned Roles artifacts so that they contain the correct destination environment Shared Services application group.

- To modify the Essbase Assigned Roles artifacts:
 - 1 **In the destination environment, navigate to the file system location where the Shared Services Essbase Assigned Roles artifacts reside. For example, `C:\Hyperion\common\import_export\admin@Native Directory\Sample Basic - HSS artifacts\resource\Native Directory\Assigned Roles\Essbase`.**
 - 2 **Select the `.csv` file (for example, `Sample.csv`) and open the file in Microsoft Excel.**
 - 3 **Change the 'project_name' field to reflect the correct application group in the destination environment. For example, change 'Essbase:LCMDEV:1' to 'Essbase:LCMTEST:1'.**
 - 4 **Save and close the `.csv` file.**

Importing an Essbase Database from the File System

- To import an Essbase database from the file system:
 - 1 **Back up the destination environment.** See the *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*.
 - 2 **On the destination environment, launch Shared Services Console and log in as the user who is provisioned with the appropriate Lifecycle Management roles.** For roles, see [“Essbase Migration Prerequisites” on page 8](#).
 - 3 **If importing a Performance Management Architect-enabled Essbase database, follow these steps:**
 - a. Navigate to the **File System** application group in the View pane and select the Performance Management Architect file system artifacts that are applicable to the Essbase database. For example, **Basic**.
 - b. Click **Define Migration** and define the migration as follows:
 - i. Select the destination application. For example, **EPM Architect**.
 - ii. Select the **Dimension Import Mode (Merge or Replace)**, select **Deploy after Import**, then enter the remaining parameters to deploy the application view to a physical Essbase database.
 - c. Save the migration definition.
 - d. Execute the migration.
 - e. Review the Migration Status Report to ensure the migration is completed successfully.
 - 4 **Navigate to the **File System** application group in the View pane and select the Essbase database artifacts, the Essbase Shared Services artifacts, and the Essbase Financial Reporting artifacts.**
 - 5 **Select the **Selected Artifacts** tab to review the artifacts that you selected.**
 - 6 **Click **Define Migration** and define the migration as follows:**
 - a. Select the Essbase database artifacts (for example, **File System\Sample Basic - Essbase artifacts**), specify the destination Essbase application where the Essbase artifacts will be imported, and select the **Overwrite Artifacts** option (if preferred) and a **Restructure Cube** option (**Retain cube data**, **Discard cube data**, **Keep only input data**, or **Keep only 0 level data**).
 - b. Select the Shared Services artifacts (for example, **File System\Sample Basic - HSS artifacts**), specify the Shared Services destination application where the Shared Services artifacts will be imported, and select the **Import Operation Type** and the number of **Max Errors Before Stopping Import**.
 - c. Finally, select the Financial Reporting artifacts (for example, **File System\Sample Basic - FR artifacts**), specify the Reporting and Analysis application where the Financial Reporting artifacts will be imported, and select **Exclude Job Output on Import** (if preferred).
 - 7 **Save the migration definition.**
 - 8 **Execute the migration.**
 - 9 **Review the Migration Status Report to ensure the migration is completed successfully.**

Moving Essbase Data

Lifecycle Management does not facilitate data migration. You can move data between Essbase databases using one of the following data extraction methods:

- Export command in MaxL
- @JExport custom-defined function (CDF)
- ReportWriter Script
- DATAEXPORT calculation script command

For information about these Essbase data extraction methodologies and a comparative analysis, see the *Hyperion System 9 BI+ Essbase Analytics Bulk Data Extraction Methodologies White Paper*. This white paper is available for download from the Oracle Enterprise Performance Management/Business Intelligence White papers area of the Oracle Technical Network (OTN) Web site (<http://www.oracle.com/technology/products/bi/resource-library.html>).

Planning

The Planning application consists of artifacts from various products. For example:

- Shared Services users, groups, and provisioning artifacts
- Planning artifacts
- Performance Management Architect artifacts
- Financial Reporting or Web Analysis documents

Because the Planning application artifacts span multiple products, you must migrate the artifacts from each product as it relates to the Planning application.

Note: Lifecycle Management does not currently support migration of data.

In this section:

- [“Planning Migration Prerequisites” on page 13](#)
- [“Planning Migration Process” on page 14](#)
- [“Moving Planning Data” on page 18](#)
- [“Planning Migration Known Issues” on page 18](#)

Planning Migration Prerequisites

- Install and configure Planning and all related EPM System products (such as Shared Services, Essbase, Financial Reporting, and Web Analysis). See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.
- Ensure the Planning application has all the metadata loaded.

- Users performing Lifecycle Management operations for Planning must be assigned the following roles:
 - Shared Services role: LCM Administrator
 - Planning Administrator
 - Planning Application Creator

To assign roles, see *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.
- Planning has cross-product migration dependencies, ensure you review the dependencies section of the Planning appendix in the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.
- Review the Planning migration known issues. See “[Planning Migration Known Issues](#)” on page 18.

Planning Migration Process

This section provides a high-level process for a first-time Planning application migration. For detailed migration procedures, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Note: The Oracle Technology Network provides the most recent product documentation for the current release. See <http://www.oracle.com/technology/documentation/index.html>.

Planning migration process:

1. Export the application artifacts to the file system.
See “[Exporting a Planning Application to the File System](#)” on page 15.
2. Copy the application artifacts from the file system to the destination environment file system.
See “[Copying Planning Application Artifacts to the Destination Environment](#)” on page 15.
3. For Planning Classic applications, create a Planning application in the destination environment.
See “[Creating a Planning Application in the Destination Environment for Planning Classic Applications](#)” on page 16.
4. Import the Planning application artifacts from the destination environment file system to the destination application.
See “[Importing a Planning Application from the File System](#)” on page 17.
5. Move the Planning data.
See “[Moving Planning Data](#)” on page 18.

Exporting a Planning Application to the File System

- To export a Planning application to the file system:
- 1 **Launch Shared Services Console** and log in as the user who is provisioned with the appropriate Lifecycle Management roles. For roles, see [“Planning Migration Prerequisites” on page 13](#).
 - 2 **In Shared Services Console, select the following artifacts for a Planning application migration:**
 - Any Native Directory artifacts and taskflows that pertain to the Planning application. For example, Native Directory Users, Groups, and Assigned Roles.

Note: Select assigned roles for all products that contain artifacts for Planning.

 - All of the artifacts in the Planning application you are migrating. For example, **HPSamp**.
 - For a Performance Management Architect-enabled Planning application, the Performance Management Architect artifacts for the Planning application you are migrating. For example, **HPSamp**.
 - The Reporting and Analysis Financial Reporting artifacts. For example, **HPSamp Reports**.
 - 3 **In Shared Services Console, select the **Selected Artifacts** tab to review the artifacts that you selected for the Planning application migration.**
 - 4 **Click **Define Migration** and define the migration as follows:**
 - a. Select the Shared Services application (for example, **Foundation\Shared Services**) and specify the file system folder where the Shared Services artifacts will be exported.
 - b. For a Performance Management Architect-enabled Planning application, select the Performance Management Architect application (for example, **Foundation\EPM Architect**) and specify the file system folder where the Performance Management Architect artifacts will be exported.
 - c. Select the Planning application (for example, **Planning\HPSamp**) and specify the file system folder where the Planning artifacts will be exported.
 - d. Finally, select the Reporting and Analysis application (for example, **Reporting and Analysis \Reporting and Analysis**), select **Export with Job Output** if you want that information to be migrated, and then specify the file system folder where the Reporting and Analysis Financial Reporting artifacts will be exported.
 - 5 **Save the migration definition.**
 - 6 **Execute the migration.**
 - 7 **Review the Migration Status Report to ensure the migration is completed successfully.**

Copying Planning Application Artifacts to the Destination Environment

The database artifacts that exist on the file system must be moved to the destination environment file system. This can be accomplished using File Transfer Protocol (FTP), burning them to a DVD, or using another transfer method.

Note: The default file system location for Lifecycle Management artifacts is on the Shared Services Web application server computer at `HYPERION_HOME/common/import_export/username@ProviderName/`.

- To copy Planning application artifacts to the destination environment:
 - 1 Navigate to the file system location where the application artifacts currently reside. For example, **HPSamp - Planning artifacts, HPSamp - FR artifacts, HPSamp - HSS artifacts, HPSamp - EPMA artifacts.**
 - 2 Copy and paste the folders from the file system location to the transfer medium (DVD, FTP, or another transfer method).
 - 3 On the destination environment, copy the folders from the transfer medium to the file system location.

Note: Ensure the files are copied to the user directory on the destination file system for the user who will be performing the migration from the file system. If they are copied to a directory for a different user, the user performing the migration will not see the files under the File System application group in Shared Services Console.

Creating a Planning Application in the Destination Environment for Planning Classic Applications

For Planning Classic applications, before migrating a Planning application, you must first create the Planning application in the destination environment.

For detailed application creation procedures, see the *Oracle Hyperion Planning, Fusion Edition Administrator's Guide*.

Note the following:

- You can skip this section if the Planning application already exists in the destination environment or if the Planning application is Performance Management Architect-enabled.
- The following dimension-level properties must match in both the source and destination applications:
 - Start year
 - Base time period (for example, 12 months, Quarters, and Custom)
 - Start month
 - Application types (for example, if the source has a “Single Currency” application type, then the destination application should be of the same type)
 - Plan types (for example, if the source application has a “Plan1” plan type, a “Plan1” plan type must exist in the destination application)

- To create a Planning application in the destination environment:
 - 1 Launch Oracle Enterprise Performance Management Workspace, Fusion Edition.
 - 2 Select **Navigate**, then **Administer**, then **Classic Application Administration**, and then **Planning Administration**.

- 3 Click **Manage Data Source**.
- 4 Click **Create Data Source**, enter Data Source parameters, and click **Finish**.
- 5 Click **Create Application**, enter application information, click **Next**, and then click **Finish**.
- 6 Log in to the newly created Planning application, select **Administration**, then **Manage Database** and run **Cube Create** to create the outline in Essbase.

Importing a Planning Application from the File System

Planning application artifacts must be imported and deployed in the following order:

1. Shared Services artifacts
2. If the Planning application is Performance Management Architect-enabled, Performance Management Architect artifacts
3. Planning application artifacts and Planning Financial Reporting artifacts

► To import a Planning application from the file system:

- 1 **Back up the destination environment.** See the *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*.
- 2 **On the destination environment, launch Shared Services Console and log in as the user who is provisioned with the appropriate Lifecycle Management roles.** For roles, see [“Planning Migration Prerequisites” on page 13](#).
- 3 **Import the Shared Services artifacts:**
 - a. Navigate to the **File System** application group in the View pane and select the Planning Shared Services artifacts. For example, **File System\HPSamp - HSS artifacts**.
 - b. Click **Define Migration**, specify the Shared Services destination application where the Shared Services artifacts will be imported, and select the **Import Operation Type** and the number of **Max Errors Before Stopping Import**.
 - c. Save the migration definition.
 - d. Execute the migration.
 - e. Review the Migration Status Report to ensure the migration is completed successfully.
- 4 **If importing a Performance Management Architect-enabled Planning application, follow these steps:**
 - a. Navigate to the **File System** application group in the View pane and select the Oracle Hyperion EPM Architect, Fusion Edition file system artifacts that pertain to the Planning application. For example, **HPSamp**.
 - b. Click **Define Migration**, select the destination application (for example, **EPM Architect**), select the **Dimension Import Mode** (**Merge** or **Replace**), select **Deploy after Import**, then enter the remaining parameters to deploy the application view to a physical Planning application.
 - c. Save the migration definition.
 - d. Execute the migration.

- e. Review the Migration Status Report to ensure the migration is completed successfully.
- 5 Import the Planning application artifacts and the Planning Financial Reporting artifacts:**
- a. Navigate to the **File System** application group in the View pane and select the Planning application artifacts and the Planning Financial Reporting artifacts.
 - b. Select the **Selected Artifacts** tab to review the artifacts that you selected.
 - c. Click **Define Migration** and define the migration as follows:
 - i. Select the Financial Reporting artifacts (for example, **File System\HPSamp - FR artifacts**), specify the Reporting and Analysis application where the Financial Reporting artifacts will be imported, and select **Exclude Job Output on Import** (if preferred).
 - ii. Select the Planning application artifacts (for example, **File System\HPSamp - Planning artifacts**) and specify the destination Planning application where the Planning artifacts will be imported.
 - d. Save the migration definition.
 - e. Execute the migration.
 - f. Review the Migration Status Report to ensure the migration is completed successfully.

Moving Planning Data

Lifecycle Management does not facilitate data migration. The data for Planning applications resides on the Essbase server. You can move data between Essbase databases using one of the following data extraction methods:

- Export command in MaxL
- @JExport custom-defined function (CDF)
- ReportWriter Script
- DATAEXPORT calculation script command

For information about these Oracle Essbase data extraction methodologies and a comparative analysis, see the *Hyperion System 9 BI+ Essbase Analytics Bulk Data Extraction Methodologies White Paper*. This white paper is available for download from the Oracle Enterprise Performance Management/Business Intelligence White papers area of the Oracle Technical Network (OTN) Web site (<http://www.oracle.com/technology/products/bi/resource-library.html>).

Planning Migration Known Issues

The following Planning migration known issues are noteworthy:

- Migrating large Planning applications (applications containing dimensions with more than 25,000 members) is not supported. Before migrating large applications, you must evaluate them and filter out the following dimensions:
 - Dimensions having too many members

- Standard dimensions
- Custom dimensions
- Attribute dimensions

Migrate the dimensions with the fewest members first. Then when importing the larger dimensions, import the attribute dimensions first and then the rest of the dimensions.

- The Period Dimension must match in both the source and destination applications. For example, if the Period dimension in the source has a “Quarter 1” member, a “Quarter 1” member must exist in the destination.
- To export and import Planning security, use the following Planning command-line utilities (ExportSecurity and ImportSecurity):
 - `HYPERION_HOME\products\Planning\bin\ExportSecurity.cmd`
 - `HYPERION_HOME\products\Planning\bin\ImportSecurity.cmd`

For additional Oracle Hyperion Planning, Fusion Edition migration known issues, see *Oracle’s Hyperion Shared Services Readme*.

Reporting and Analysis

Reporting and Analysis consists of artifacts from various products. For example:

- Shared Services users, groups, provisioning artifacts, and taskflows
- Oracle's Hyperion® Interactive Reporting
- Oracle's Hyperion® SQR® Production Reporting
- Oracle's Hyperion® Web Analysis
- Financial Reporting

Since Reporting and Analysis artifacts span multiple products, it is necessary to migrate the artifacts for each product as it relates to the repository.

Note: Lifecycle Management does not currently support migration of data.

In this section:

- [“Reporting and Analysis Migration Prerequisites” on page 19](#)
- [“Reporting and Analysis Migration Process” on page 20](#)

Reporting and Analysis Migration Prerequisites

- Install and configure Reporting and Analysis and all related Oracle Hyperion Enterprise Performance Management System products (such as Shared Services). See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

- Users performing Lifecycle Management operations for Reporting and Analysis must be assigned the following roles:
 - LCM Administrator
 - Reporting and Analysis Global Administrator

To assign roles, see *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

Reporting and Analysis Migration Process

This section provides a high-level process for a first-time Reporting and Analysis application migration. For detailed migration procedures, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Note: The Oracle Technology Network provides the most recent product documentation for the current release. See <http://www.oracle.com/technology/documentation/index.html>.

Reporting and Analysis migration process:

1. Export the repository to the file system.
See “[Exporting a Reporting and Analysis Repository to the File System](#)” on page 21.
2. Copy the application artifacts from the file system to the destination environment file system.
See “[Copying Reporting and Analysis Artifacts to the Destination Environment](#)” on page 21.
3. If using Production Reporting, configure Production Reporting.
See “[Configure Production Reporting](#)” on page 22.
4. Import the repository from the destination environment file system to the destination repository.
See “[Importing Reporting and Analysis Artifacts from the File System](#)” on page 22.
5. If using Financial Reporting, change Financial Reporting database connections.
See “[Change Financial Reporting Database Connections](#)” on page 23.
6. If using Interactive Reporting, configure Interactive Reporting data sources.
See “[Configure Interactive Reporting Data Sources](#)” on page 23.
7. If using Generic Applications, configure Generic Applications.
See “[Configure Generic Applications](#)” on page 23.

Exporting a Reporting and Analysis Repository to the File System

- To export a Reporting and Analysis repository to the file system:
 - 1 Launch Shared Services Console and log in as the user who is provisioned with the appropriate Lifecycle Management roles. For roles, see [“Reporting and Analysis Migration Prerequisites” on page 19](#).
 - 2 In Shared Services Console, select the following artifacts for a Reporting and Analysis application migration:
 - Any Native Directory and Taskflows artifacts that pertain to the Reporting and Analysis application. For example, Native Directory Users, Groups, and Assigned Roles.

Note: Select assigned roles for all products that contain artifacts for the Reporting and Analysis repository.
 - All of the artifacts in the Reporting and Analysis repository you are migrating.
 - 3 In Shared Services Console, select the **Selected Artifacts** tab to review the artifacts that you selected for the Reporting and Analysis migration.
 - 4 Click **Define Migration** and define the migration as follows:
 - a. Select the Shared Services application (for example, **Foundation\Shared Services**) and specify the file system folder where the Shared Services artifacts will be exported.
 - b. Select the Reporting and Analysis application (for example, **Reporting and Analysis \Reporting and Analysis**), select **Export with Job Output** if you want that information to be migrated, and then specify the file system folder where the Reporting and Analysis artifacts will be exported.
 - 5 Save the migration definition.
 - 6 Execute the migration.
 - 7 Review the Migration Status Report to ensure the migration is completed successfully.

Copying Reporting and Analysis Artifacts to the Destination Environment

The artifacts that currently exist on the file system must be moved to the destination environment file system. This can be accomplished using File Transfer Protocol (FTP), burning them to a DVD, or using another transfer method.

Note: The default file system location for Lifecycle Management artifacts is on the Shared Services Web application server computer at `HYPERION_HOME/common/import_export/<username>@<Directory>/` (where `<username>` is the user performing the migration and `<Directory>` is the name of the Shared Services directory to which the user belongs).

- To copy Reporting and Analysis artifacts to the destination environment:
 - 1 Navigate to the file system location where the artifacts currently reside. For example, **Reporting and Analysis - R&A artifacts, Reporting and Analysis - HSS artifacts**.

- 2 Copy and paste the folders from the file system location to the transfer medium (DVD, FTP, or another transfer method).
- 3 On the destination environment, copy the folders from the transfer medium to the file system location.

Note: Ensure the files are copied to the user directory on the destination file system for the user who will be performing the migration from the file system. If they are copied to a directory for a different user, the user performing the migration will not see the files under the File System application group in Shared Services Console.

Configure Production Reporting

If Production Reporting is in use, then the computer-specific location of the Production Reporting Server binaries that are required to run Oracle's Hyperion® SQR® Production Reporting jobs must be defined.

- To configure Production Reporting:
 - 1 Launch the Remote Service Configurator (RSC).
 - 2 Log on to the RSC providing the Administrative user name, password for user name, Reporting and Analysis host of the services to configure, and Reporting and Analysis port number for the server host; default is 6800.
 - 3 Double-click the job service in the list (for example, *JF1_hostname*) to view properties.
 - 4 Select the **PR** tab and click **Add**.
 - 5 Choose the PR Server type, then click **OK**.
 - 6 Provide the path to the corresponding PR Server bin folder (for example, *C:\hyperion\products\biplus\bin\SQR\Server\ODBC\bin*), then click **OK**.

For more information, see the *Oracle Enterprise Performance Management Workspace, Fusion Edition Administrator's Guide*.

Importing Reporting and Analysis Artifacts from the File System

- To import Reporting and Analysis artifacts from the file system:
 - 1 Back up the destination environment. See the *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*.
 - 2 On the destination environment, launch Oracle's Hyperion® Shared Services Console and log in as the user who is provisioned with the appropriate Oracle Hyperion Enterprise Performance Management System Lifecycle Management roles. For roles, see [“Reporting and Analysis Migration Prerequisites” on page 19](#).
 - 3 Navigate to the **File System** application group in the View pane and select the Reporting and Analysis artifacts and the Shared Services artifacts.
 - 4 Select the **Selected Artifacts** tab to review the artifacts that you selected.
 - 5 Click **Define Migration** and define the migration as follows:

- a. Select the Shared Services artifacts (for example, **File System\Reporting and Analysis - HSS artifacts**), specify the Shared Services destination application where the Oracle's Hyperion® Shared Services artifacts will be imported, and select the **Import Operation Type** and the number of **Max Errors Before Stopping Import**.
 - b. Select the Reporting and Analysis artifacts (for example, **File System\Reporting and Analysis - R&A artifacts**), specify the Reporting and Analysis repository where the Reporting and Analysis artifacts will be imported, and select **Exclude Job Output on Import** (if preferred).
- 6 Save the migration definition.
 - 7 Execute the migration.
 - 8 Review the Migration Status Report to ensure the migration is completed successfully.

Change Financial Reporting Database Connections

Change the Financial Reporting data source connections for each Financial Reporting object. For detailed information about changing Oracle Hyperion Financial Reporting, Fusion Edition database connections, see the *Oracle Enterprise Performance Management Workspace, Fusion Edition User's Guide*.

Configure Interactive Reporting Data Sources

To successfully process Interactive Reporting documents (BQYs) and to run jobs, Data Access Service (DAS) data sources that use Oracle's Hyperion® Interactive Reporting services need to be defined. DAS data source details are also computer-specific and need to be defined manually.

- To configure Interactive Reporting data sources:
 - 1 Launch the Configuration and Monitoring Console (CMC).
 - 2 Log on to the CMC module (<http://host:55000/cmc>).
 - 3 From the **Service Configuration** view, select **Interactive Reporting Data Access Service**, launch the **Properties** dialog from either the icon tool bar or the context menu, then select the **Data Sources** tab.
 - 4 Click **New**. For **Connectivity Type**, select ODBC. For **Database Type**, select MS SQL Server. Specify your ODBC connection name.
 - 5 Restart Agent.

For more information, see the *Oracle Enterprise Performance Management Workspace, Fusion Edition Administrator's Guide*.

Configure Generic Applications

If generic jobs are used, the binary and environment definition for this application should be provided.

➤ To configure Generic Applications:

- 1 Launch the Remote Service Configurator (RSC).
- 2 Log on to the RSC providing the Administrative user name, password for user name, Reporting and Analysis host of the services to configure, and Oracle's Hyperion Reporting and Analysis port number for the server host; default is 6800.
- 3 Double-click the job service in the list (for example, *JF1_hostname*) to view properties.
- 4 If a generic application definition is already imported, select the **Application** tab and choose an application from the **Application** list.
- 5 Select the **Executable** tab, and click **Add**.
- 6 Add any executable details (for example, `C:\windows\system32\cmd.exe`) and environment variables.
- 7 Click **OK**, then click **OK** again. The generic application executable is defined.
- 8 Restart Core Services.

For more information, see the *Oracle Enterprise Performance Management Workspace, Fusion Edition Administrator's Guide*.

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