

ORACLE® ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Release 11.1.2.1

Migrating Oracle Hyperion Planning Applications



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About This Document

This document is a tutorial on how to migrate an Oracle Hyperion Planning application from one environment to another. The steps include both artifacts and data of Planning and associated components including, Oracle Hyperion Calculation Manager, Oracle Essbase Server, Oracle Hyperion Financial Reporting, and Oracle Hyperion Shared Services artifacts.

There are three exercises in this document that walk you through the steps needed to migrate artifacts and data from one environment to another.

- [Exercise 1: Create a Planning Application Shell](#)

This exercise provides steps to create an empty Planning shell application. – 15 Minutes

- [Exercise 2: Import Application Artifacts and Data](#)

This exercise provides steps to import sample application artifacts using Oracle Hyperion Enterprise Performance Management System Lifecycle Management and load the Essbase data using Oracle Essbase Administration Services. – 30 Minutes

- [Exercise 3: Export Application Artifacts and Data](#)

This exercise provides steps to export application artifacts using Lifecycle Management and export Essbase data using Administration Services. – 30 Minutes

Setting Up the Environment

Subtopics

- [Building an Environment](#)
- [Applying Patches](#)
- [Downloading Sample Data](#)

Building an Environment

Before you start these exercises, you will need an environment. To build this environment, follow the steps in the guide titled *Rapid Deployment - Planning Domain for Release 11.1.2.1* located here: <http://www.oracle.com/technetwork/middleware/bi-foundation/resource-library-090986.html>.

Applying Patches

Log on to support.oracle.com, and download and apply Patch 13387745.

Downloading Sample Data

You will need some sample data for these exercises. To download the sample data:

1. Create the following folders:

C:\HPDataset

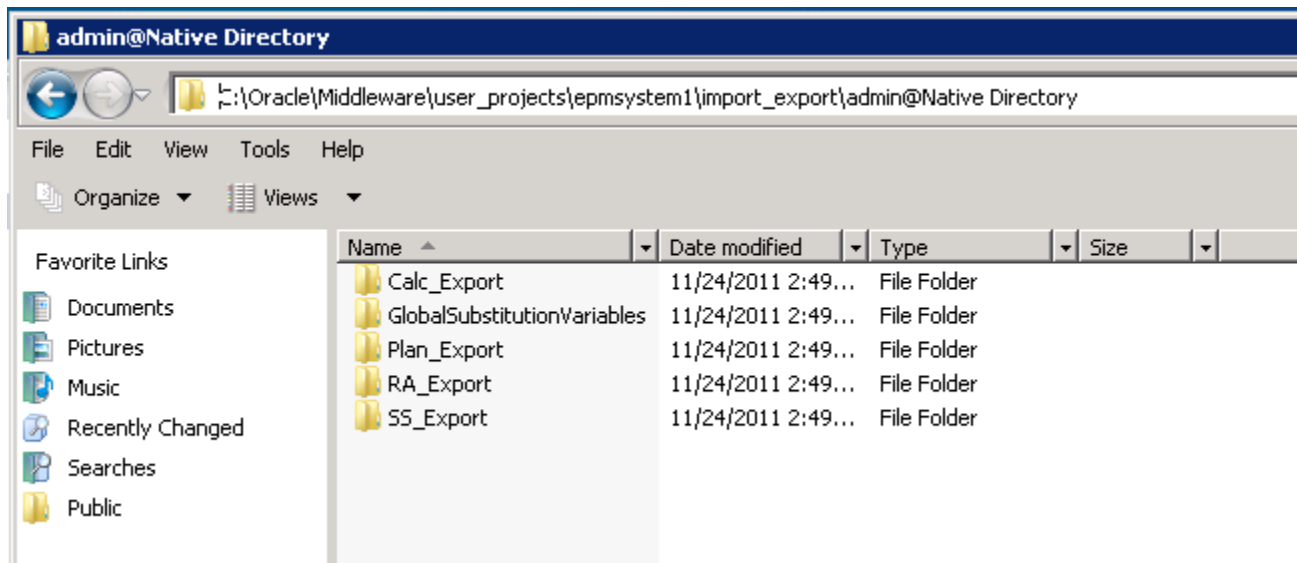
C:\Oracle\Middleware\user_projects\epmsystem1\import_export
\admin@Native Directory

2. From the White Paper library, download the file, Migrating Oracle Hyperion Planning Applications for Release 11.1.2.1 - Data.7z, and unzip its content to C:\HPDataset.

You must use 7-zip to unzip the contents of the file.

3. Copy the following folders from C:\HPDataset to C:\Oracle\Middleware\user_projects\epmsystem1\import_export\admin@Native Directory directory:

- Calc_Export
- GlobalSubstitutionVariables
- Plan_Export
- RA_Export
- SS_Export



Exercise 1: Create a Planning Application Shell

- To create a Planning application shell:

- 1 Log in to Oracle Hyperion Shared Services Console (<http://<host>:<port>/interop/index.jsp>) as the admin user and create an application group called Planning.
- 2 Open c:\HPDataset\CreateApp.xml in a text editor and substitute the values shown below for the Planning data source to be created:

```
<optionInfo name="DBType" value="Oracle_OR_SQL_OR_DB2" />  
<optionInfo name="DBServer" value="DB_SERVER_HOSTNAME" />  
<optionInfo name="DBPort" value="DB_PORT" />
```

```
<optionInfo name="DBDatabase" value="DB_SID_OR_SERVERNAME" />
<optionInfo name="DBUser" value="PLANNING_DB_USERNAME" />
<optionInfo name="DBPassword" value="PLANNING_DB_USER_PASSWORD" />
<optionInfo name="OlapServer" value="ESSBASE_SERVER_HOSTNAME" />
<optionInfo name="OlapUser" value="ESSBASE_ADMIN_USERNAME" />
<optionInfo name="OlapPassword" value="ESSBASE_ADMIN_USER_PASSWORD"/>
<optionInfo name="Unicode" value="False" />
```

3 Open a command prompt and change directory (CD) to `<EPM_ORACLE_INSTANCE>\bin`.

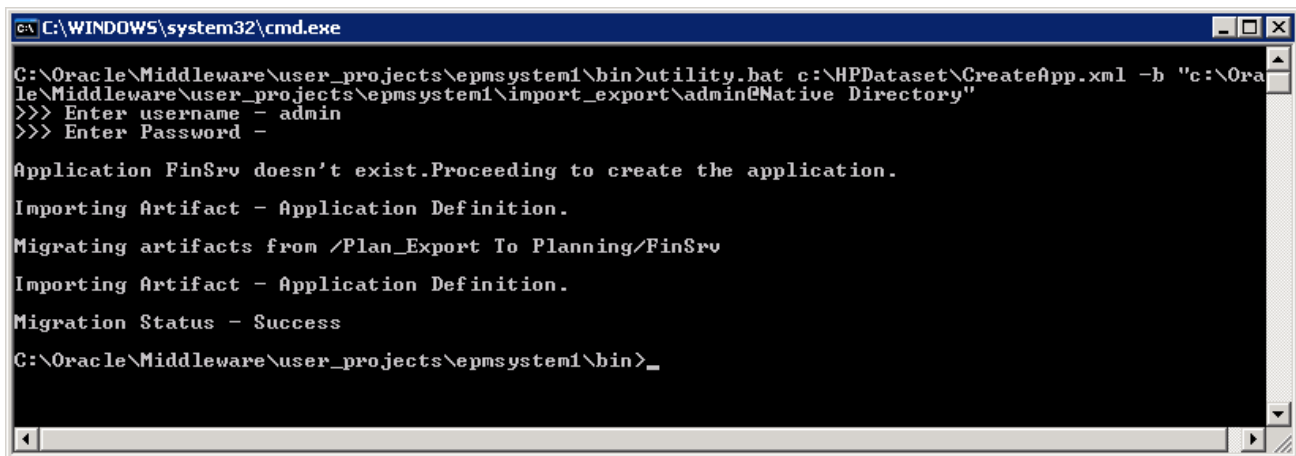
4 Execute this command:

```
utility.bat c:\HPDataset\CreateApp.xml -b "<EPM_ORACLE_INSTANCE>
\import_export\admin@Native Directory"
```

Substitute `<EPM_ORACLE_INSTANCE>` with the actual location of your environment.

5 When asked for username/password, provide the native directory admin username and password.

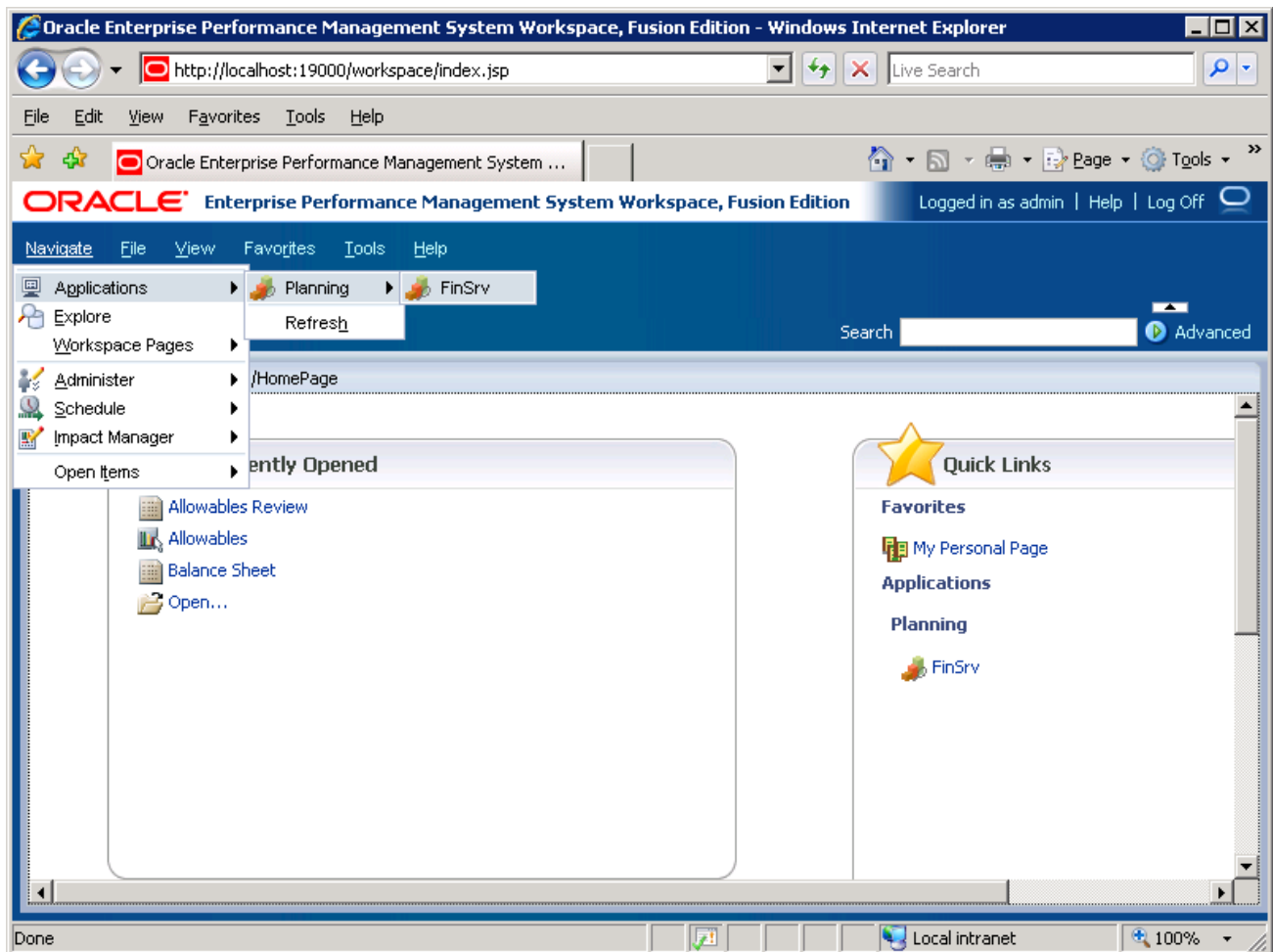
When the application creation is successful, the following screen is displayed.



```
C:\WINDOWS\system32\cmd.exe
C:\Oracle\Middleware\user_projects\epmsystem1\bin>utility.bat c:\HPDataset\CreateApp.xml -b "c:\Ora
le\Middleware\user_projects\epmsystem1\import_export\admin@Native Directory"
>>> Enter username - admin
>>> Enter Password -
Application FinSrv doesn't exist.Proceeding to create the application.
Importing Artifact - Application Definition.
Migrating artifacts from /Plan_Export To Planning/FinSrv
Importing Artifact - Application Definition.
Migration Status - Success
C:\Oracle\Middleware\user_projects\epmsystem1\bin>_
```

6 Validate that the Planning application login to Oracle Hyperion Enterprise Performance Management Workspace is as the admin user.

The URL to access Workspace is `http://<host>:<port>/workspace/index.jsp`.



Exercise 2: Import Application Artifacts and Data

Subtopics

- [Step 1: Import Planning Artifacts](#)
- [Step 2: Import Planning Data Using MaxL](#)
- [Step 3: Import Reporting Scripts](#)
- [Step 4: Validate That Your Applications Are Working Correctly](#)

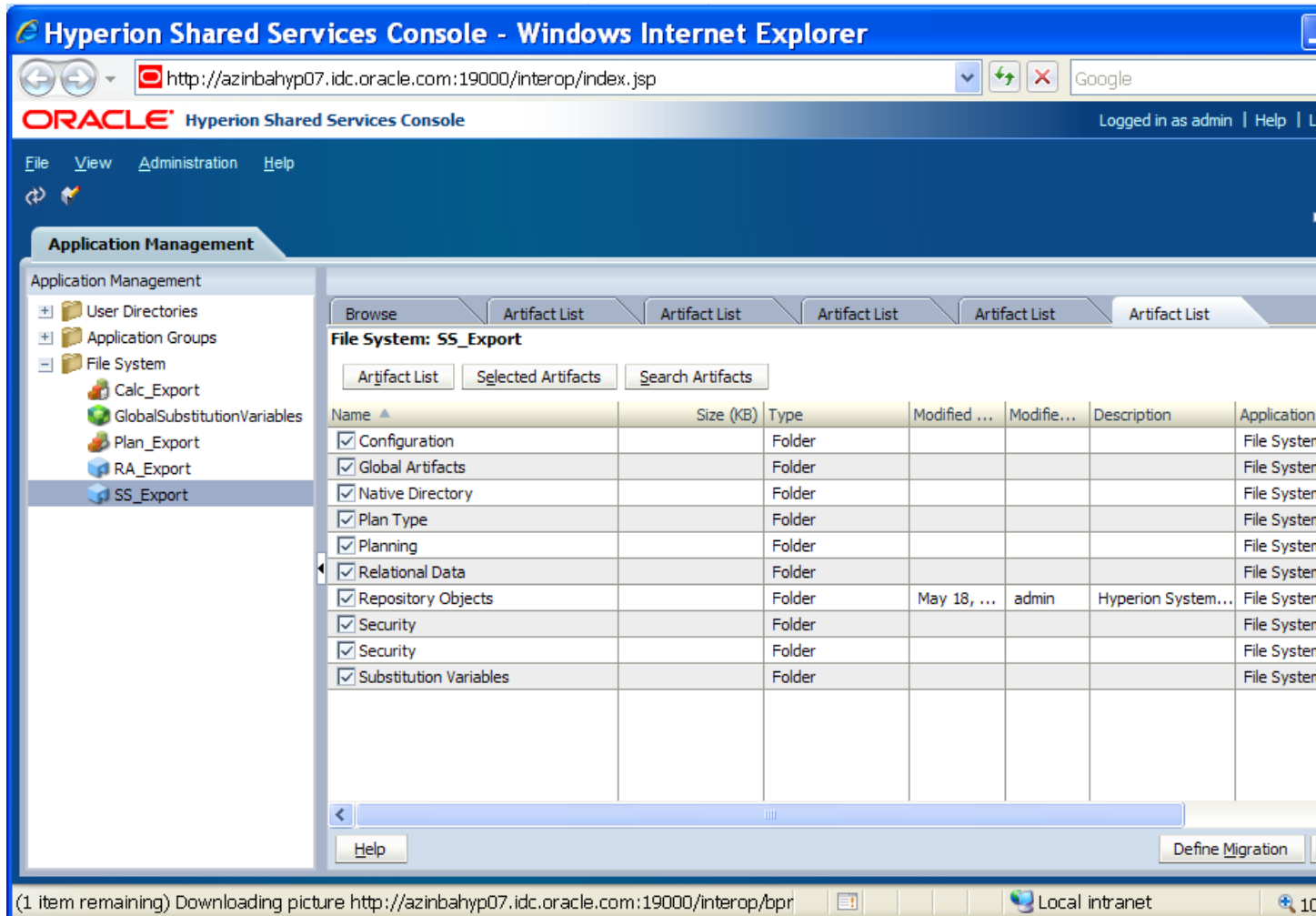
Step 1: Import Planning Artifacts

► To import Planning artifacts:

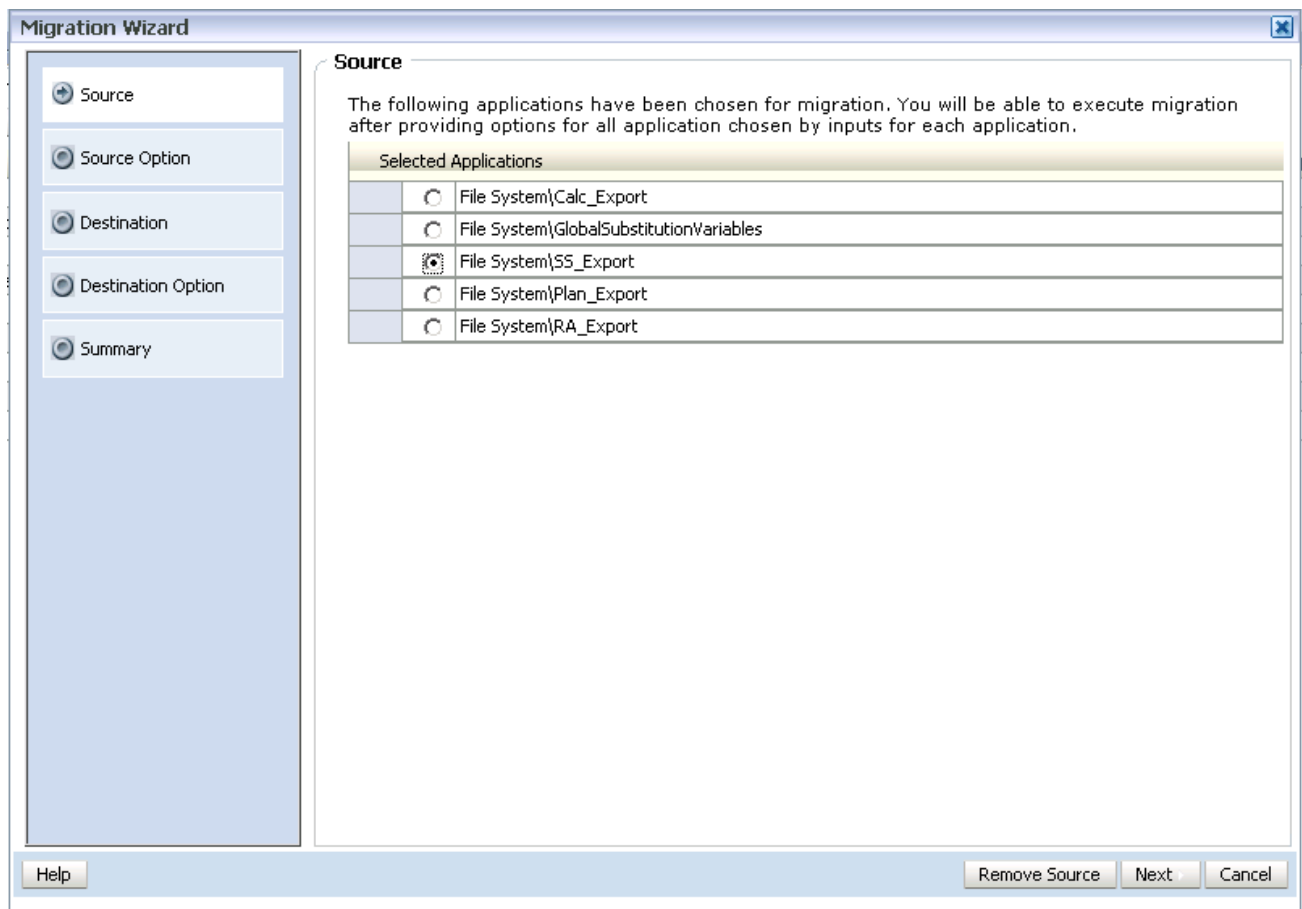
- 1 Log in to Shared Services Console by accessing `http://<host>:<port>/interop/index.jsp`.
- 2 Enter the `admin` username and password.
- 3 After successful login, expand **File System** and perform the following steps:

- a. In the left pane, select **Calc_Export**; then, in the right pane, click **Select All**.
 - b. In the left pane, select **GlobalSubstitutionvariables**; then, in the right pane click **Select All**.
 - c. In the left pane, select **Plan_Export**; then, in the right pane click **Select All**.
 - d. In the left pane, select **RA_Export**; then, in the right pane click **Select All**.
 - e. In the left pane, select **SS_Export**; then, in the right pane click **Select All**.
- 4 Click the **Selected Artifacts** button.

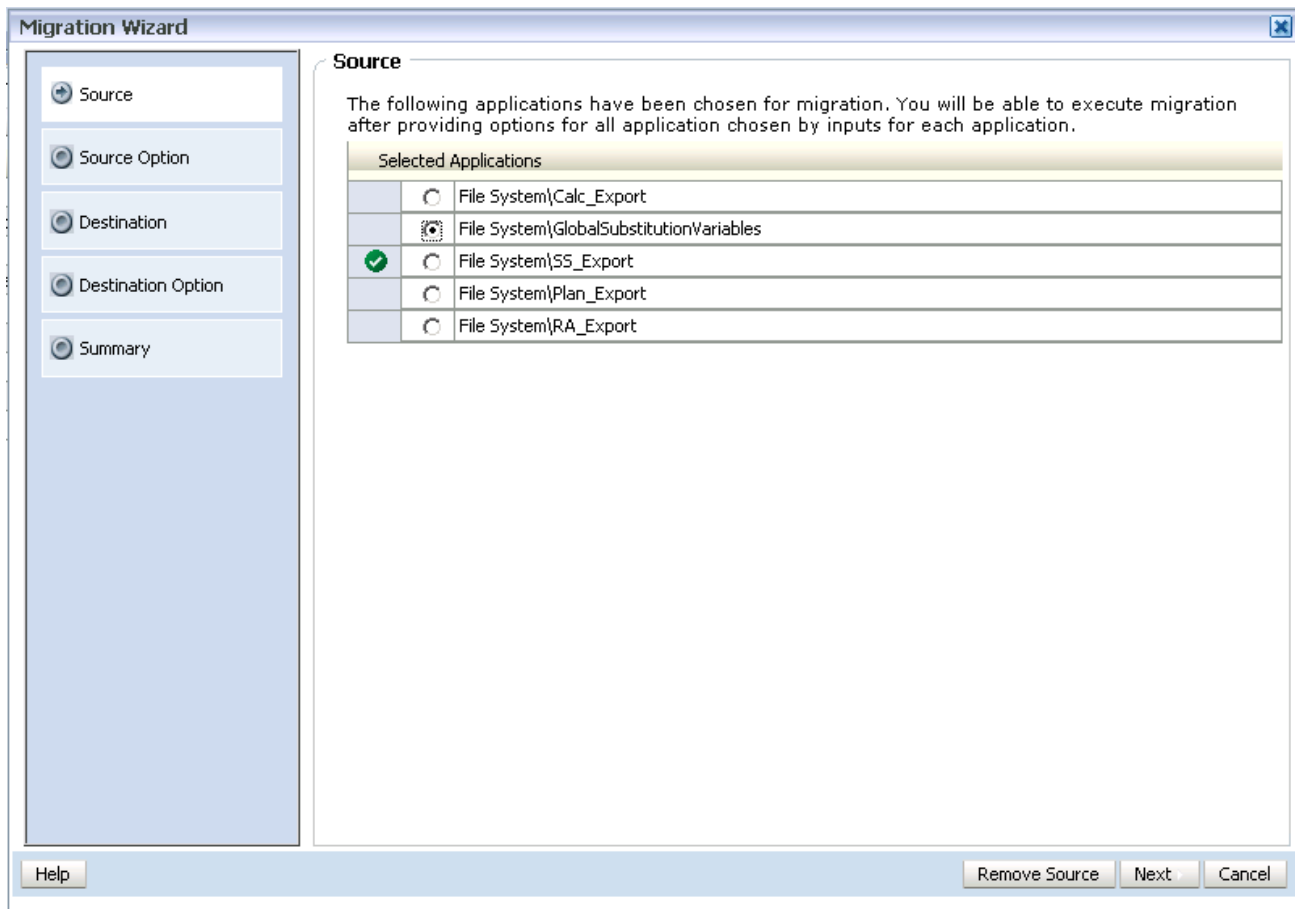
The following screen is displayed:



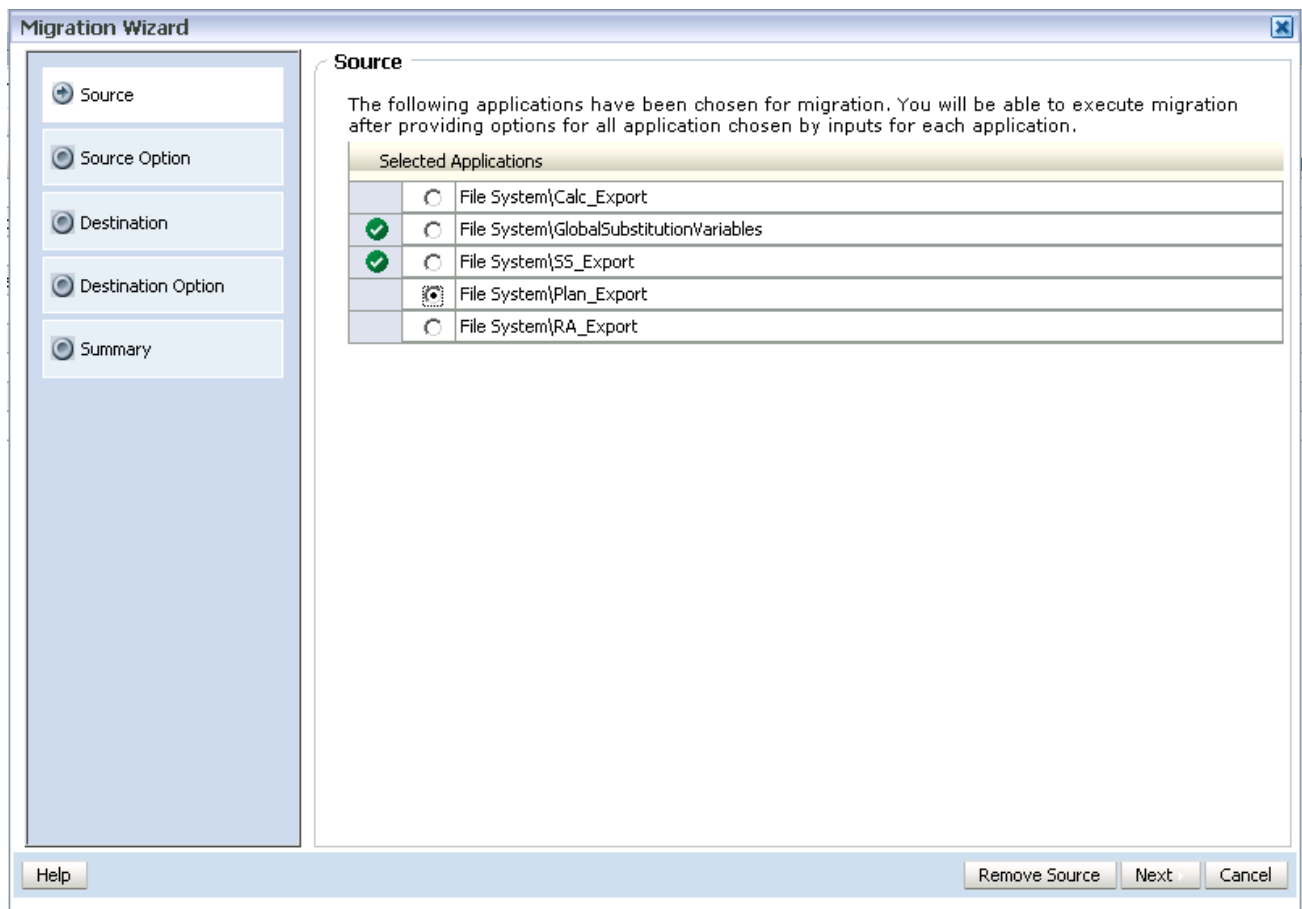
- 5 Click **Define Migration** to start the Migration Wizard.
- 6 On the **Source** screen, select the Shared Services source (**File System\SS_Export**) and click **Next**.



- 7 On the **Source Options** screen, leave the defaults and click **Next**.
- 8 On the **Destination** screen, leave the defaults (Foundation, Shared Services) and click **Next**.
- 9 On the **Destination Options** screen, leave the defaults and click **Next**.
- 10 On the **Source** screen, select the source Essbase Global Substitution Variables File System (**File System \GlobalSubstitutionVariables**) and click **Next**.

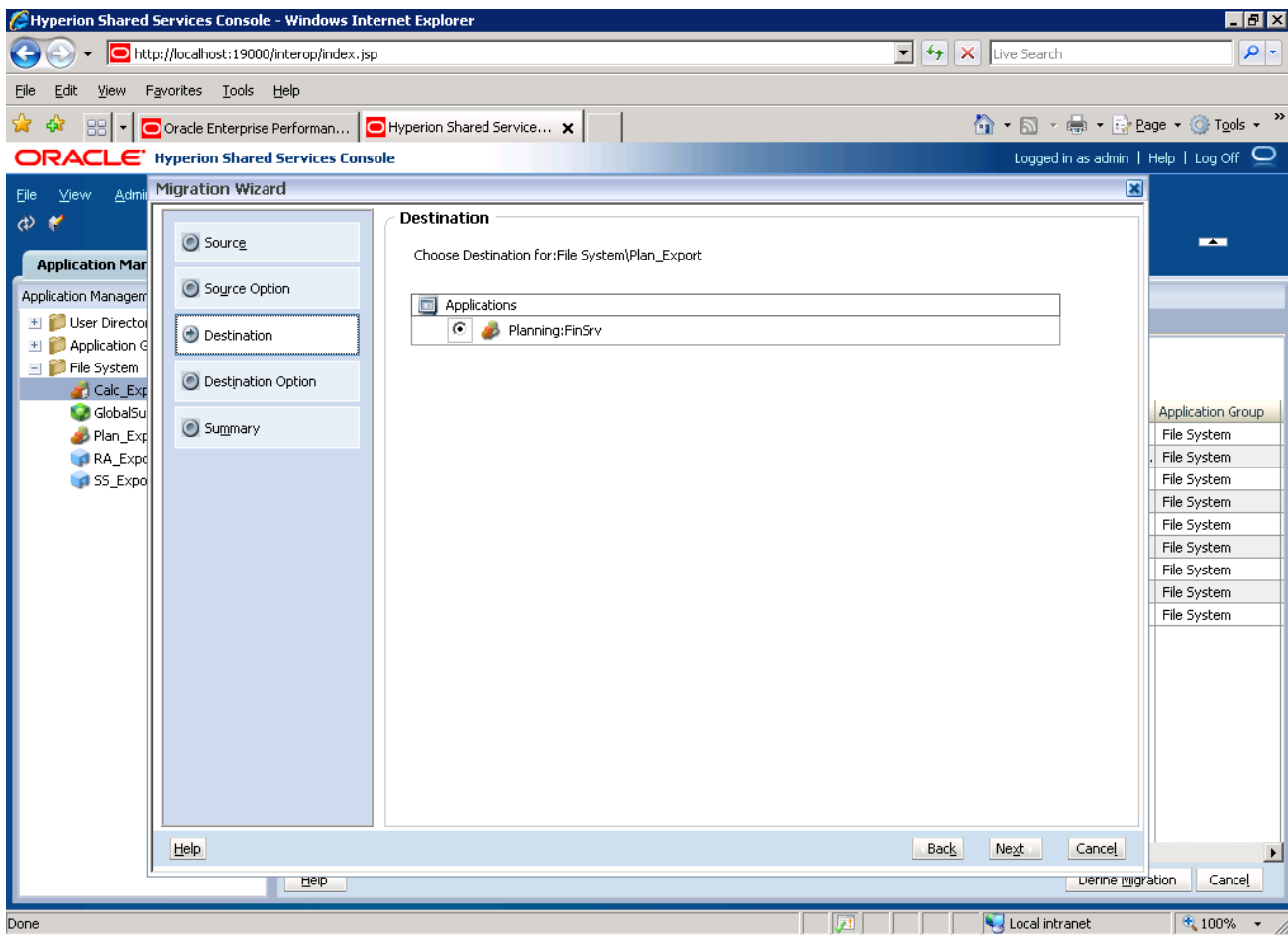


- 11 On the **Source Options** screen, leave the defaults and click **Next**.
- 12 On the **Destination** screen, leave the defaults (EssbaseCluster-1:EssbaseCluster-1) and click **Next**.
- 13 On the **Destination Options** screen, leave the defaults and click **Next**.
- 14 On the **Source** screen, select the Planning Application File System (**File System\Plan Export**) and click **Next**.



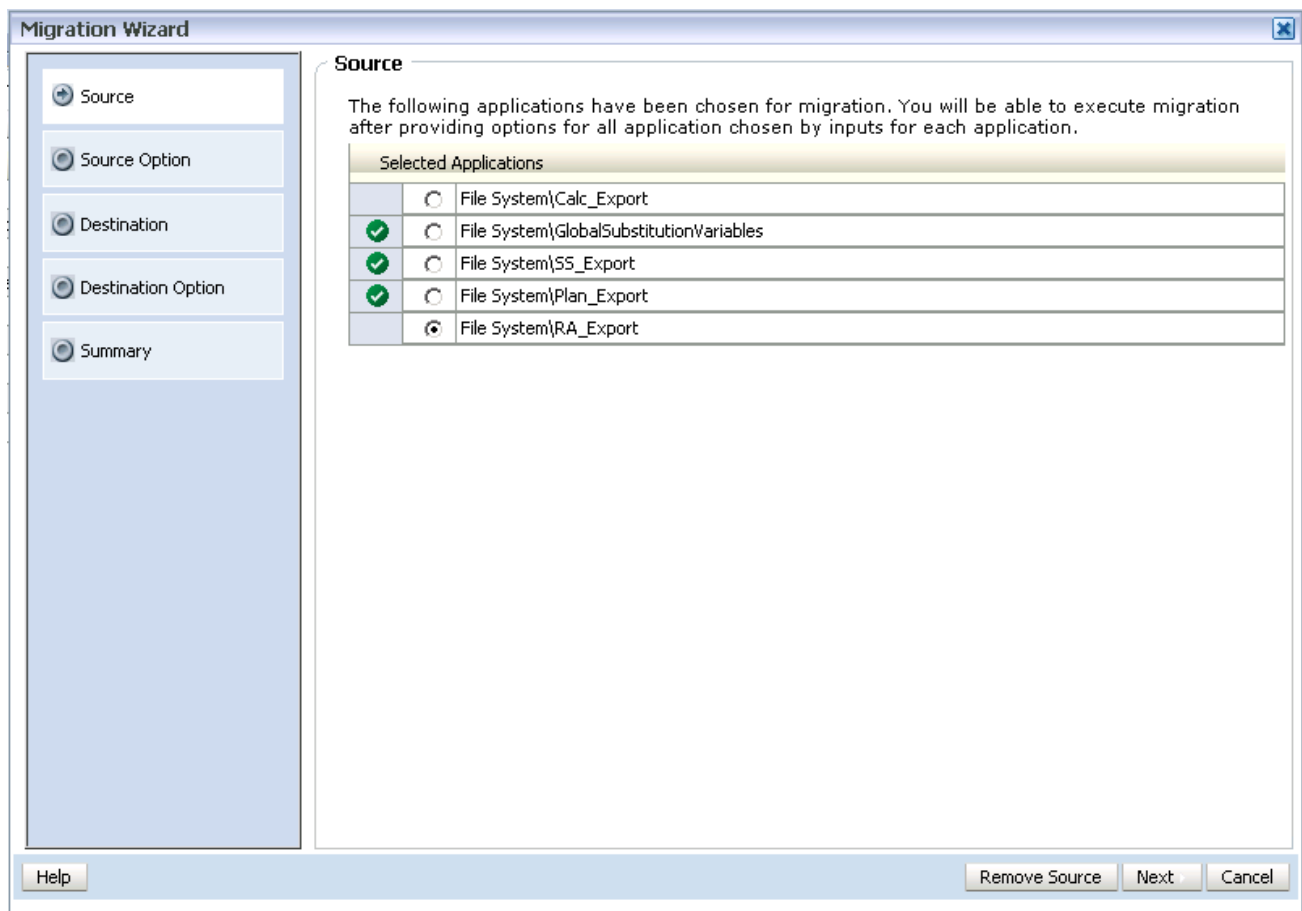
15 On the **Source Options** screen, leave the defaults and click **Next**.

16 On the **Destination** screen, select the FinSrv Planning application that was created using Lifecycle Management in Step 2 and click **Next**.

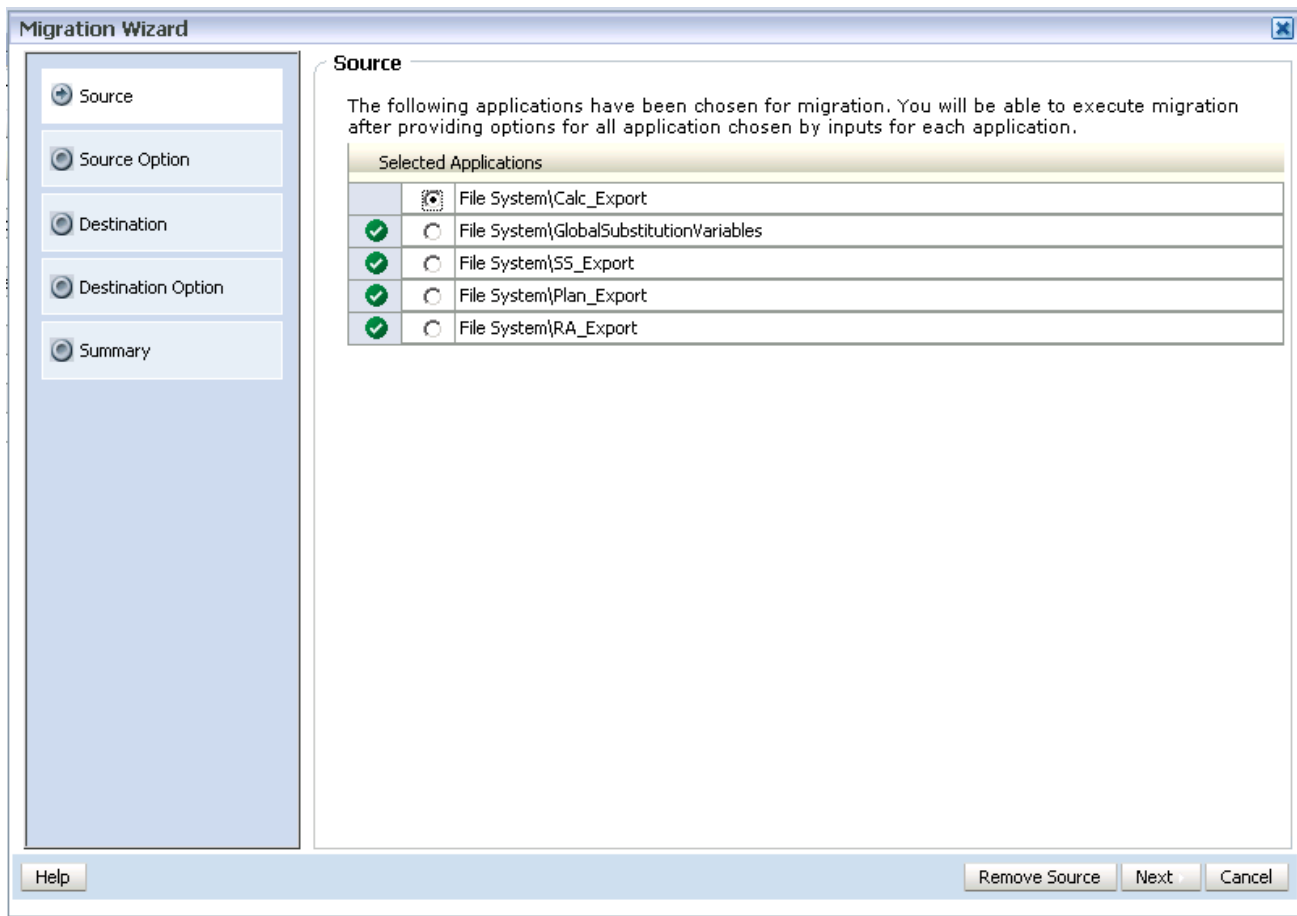


17 On the **Destination Options** screen, leave the defaults and click **Next**.

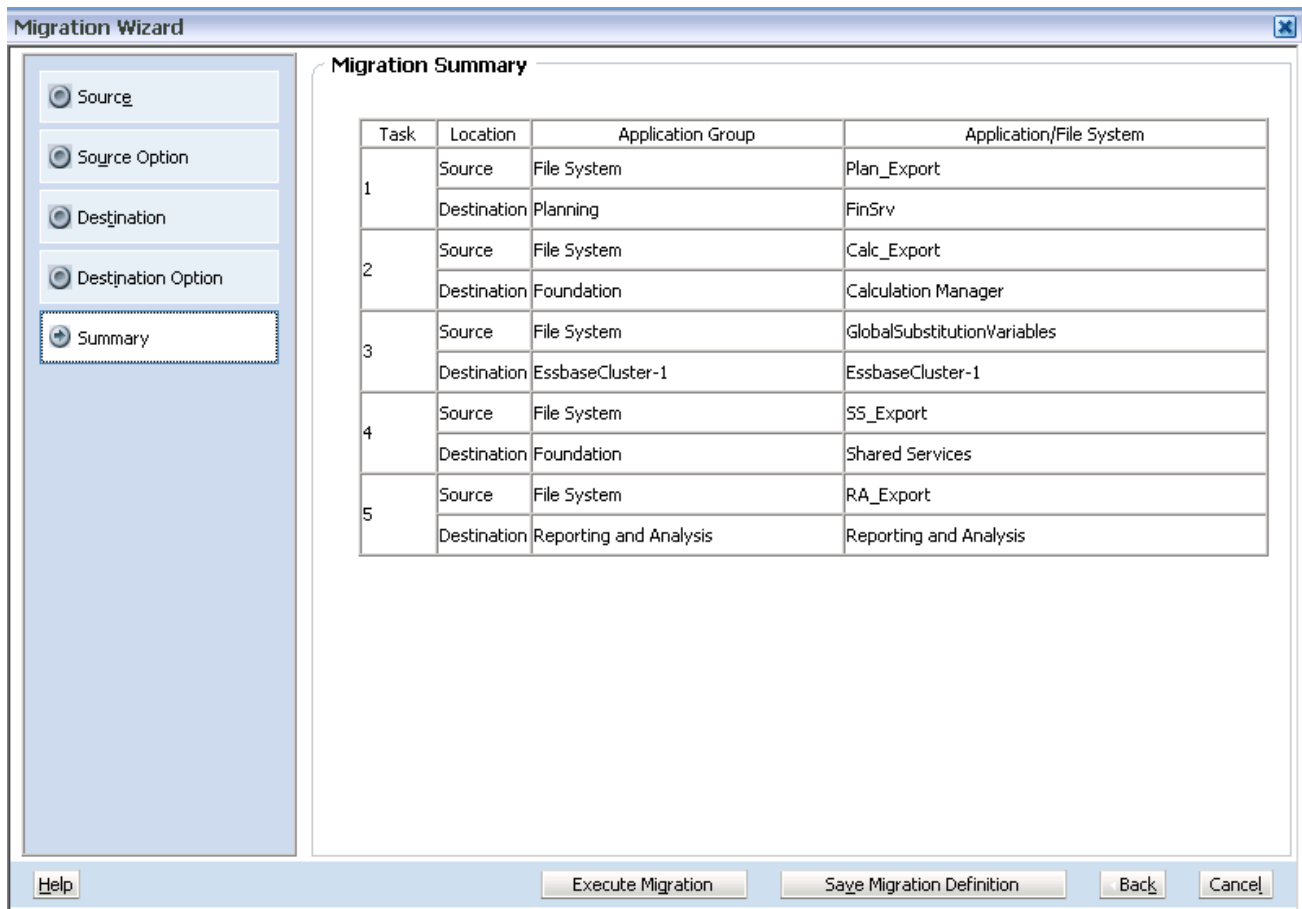
18 On the **Source** screen, select the Reporting and Analysis Application File System (**File System \RA_Export**) and click **Next**.



- 19 On the **Source Options** screen, leave the defaults and click **Next**.
- 20 On the **Destination** screen, leave the defaults (Reporting and Analysis: Reporting and Analysis) and click **Next**.
- 21 On the **Destination Options** screen, leave the defaults and click **Next**.
- 22 On the **Source** screen, select the Calculation Manager artifacts in the File System (**File System \Calc_Export**) and click **Next**.

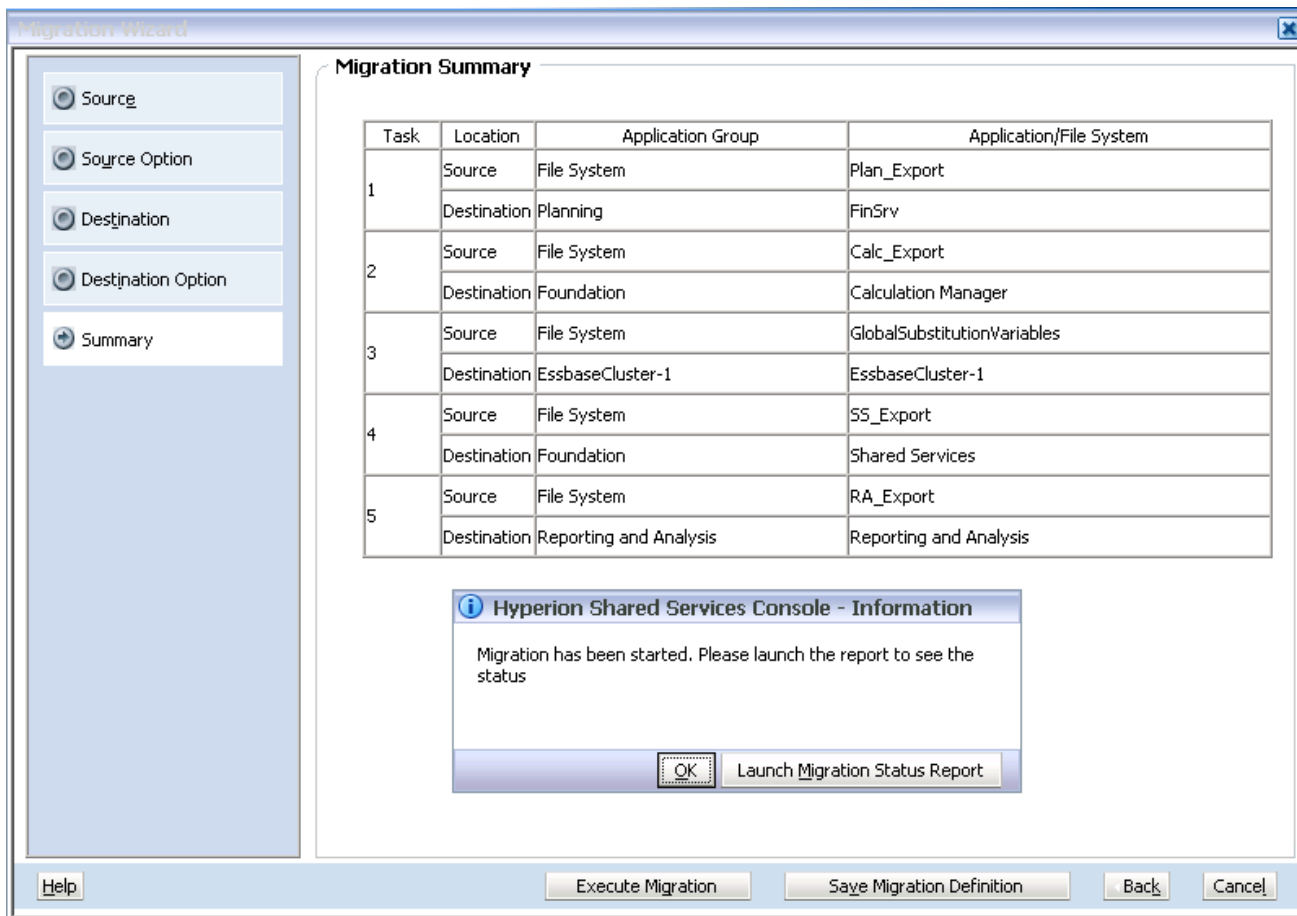


- 23 On the **Source Options** screen, leave the defaults and click **Next**.
- 24 On the **Destination** screen, leave the defaults (Foundation: Calculation Manager) and click **Next**.
- 25 On the **Destination Options** screen, leave the defaults and click **Next**.
- 26 On the **Summary** screen, click **Execute Migration**.



Note that the Save Migration Definition button saves the migration definition file to the file system, which can be used later to perform the same import from the UI or from the command line. The order of selection does not influence import in any way.

- 27** In the **Hyperion Shared Services Console - Information** dialog box, click **Launch Migration Status Report**.



28 In the **Migration Status Report**, wait for the import operation to complete.

The status will say “Completed” when successful.

Migration Status Report

User	Source	Destination	Start Time	Completed Time	Duration	Status
admin	SS_Export	Shared Services	December 8, 2011 15:03:49	December 8, 2011 15:05:05	00:01:16	Completed
	RA_Export	Reporting and...				
	Plan_Export	FinSrv				
	Calc_Export	Calculation M...				
	GlobalSubstit...	EssbaseCluste...				

Step 2: Import Planning Data Using MaxL

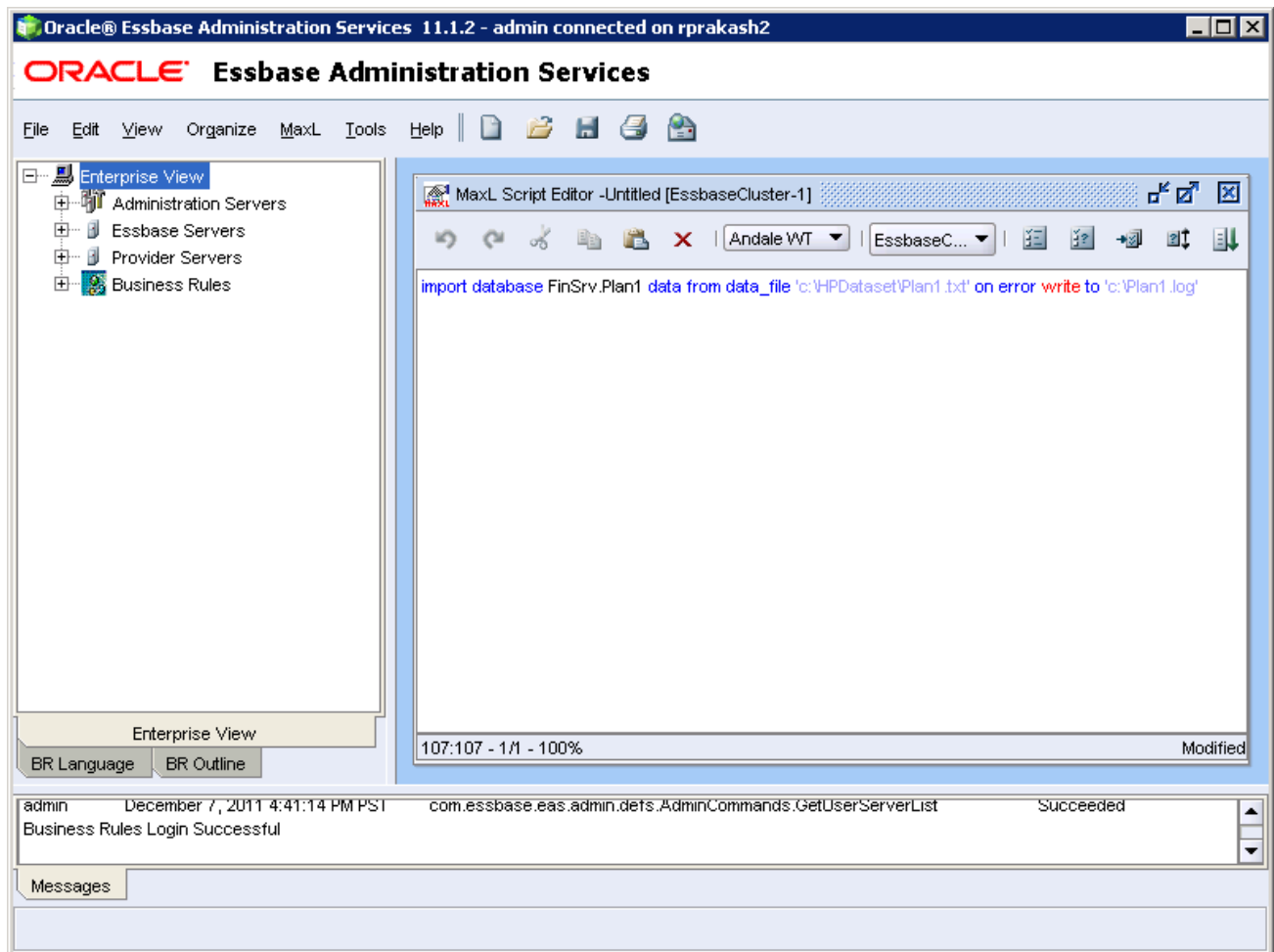
► To import Planning data using MaxL:

1 In **Essbase Administration Services Console**, select **File**, then **Editors**, and then **MaxL script editor**.

If you are using Administration Services for the first time, make sure that your Oracle Essbase server is added

2 **Execute the following command:**

```
import database FinSrv.Plan1 data from data_file 'c:\HPDataset
\Plan1.txt' on error write to 'c:\Plan1.log'
```



Step 3: Import Reporting Scripts

- To import reporting scripts, copy the report scripts (*.rep) from:

c:\HPDataset

to:

<EPM_ORACLE_INSTANCE>\EssbaseServer\essbaseserver1\app\FinSrv\Plan1

Step 4: Validate That Your Applications Are Working Correctly

After completing steps 1-3 in Exercise 2, ensure that your applications are working correctly.

Exercise 3: Export Application Artifacts and Data

Subtopics

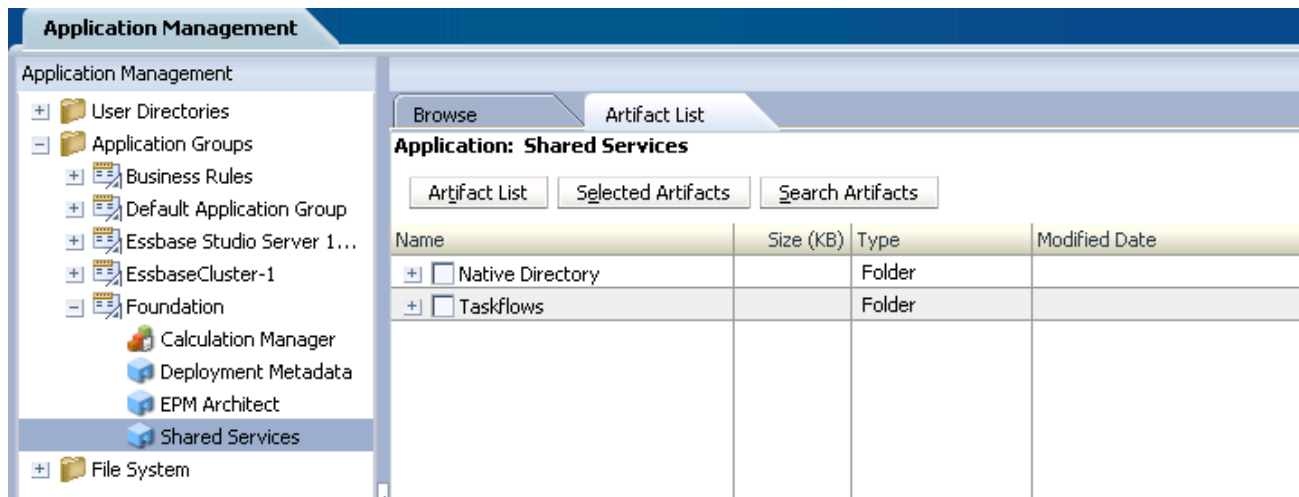
- [Step 1: Export Artifacts Using Lifecycle Management](#)
- [Step 2: Export Planning Essbase Data Using Essbase Administration Services Console](#)
- [Step 3: Copy Essbase Report Scripts from the File System](#)

Step 1: Export Artifacts Using Lifecycle Management

► To export artifacts using Lifecycle Management:

- 1 **Log in to Oracle Hyperion Shared Services Console** (<http://<host>:<port>/interop/index.jsp>) as the native directory admin user.
- 2 **Expand Application Groups, Foundation, Shared Services** and click the **Shared Services** node.

The right pane shows all the Oracle Hyperion Shared Services artifacts.



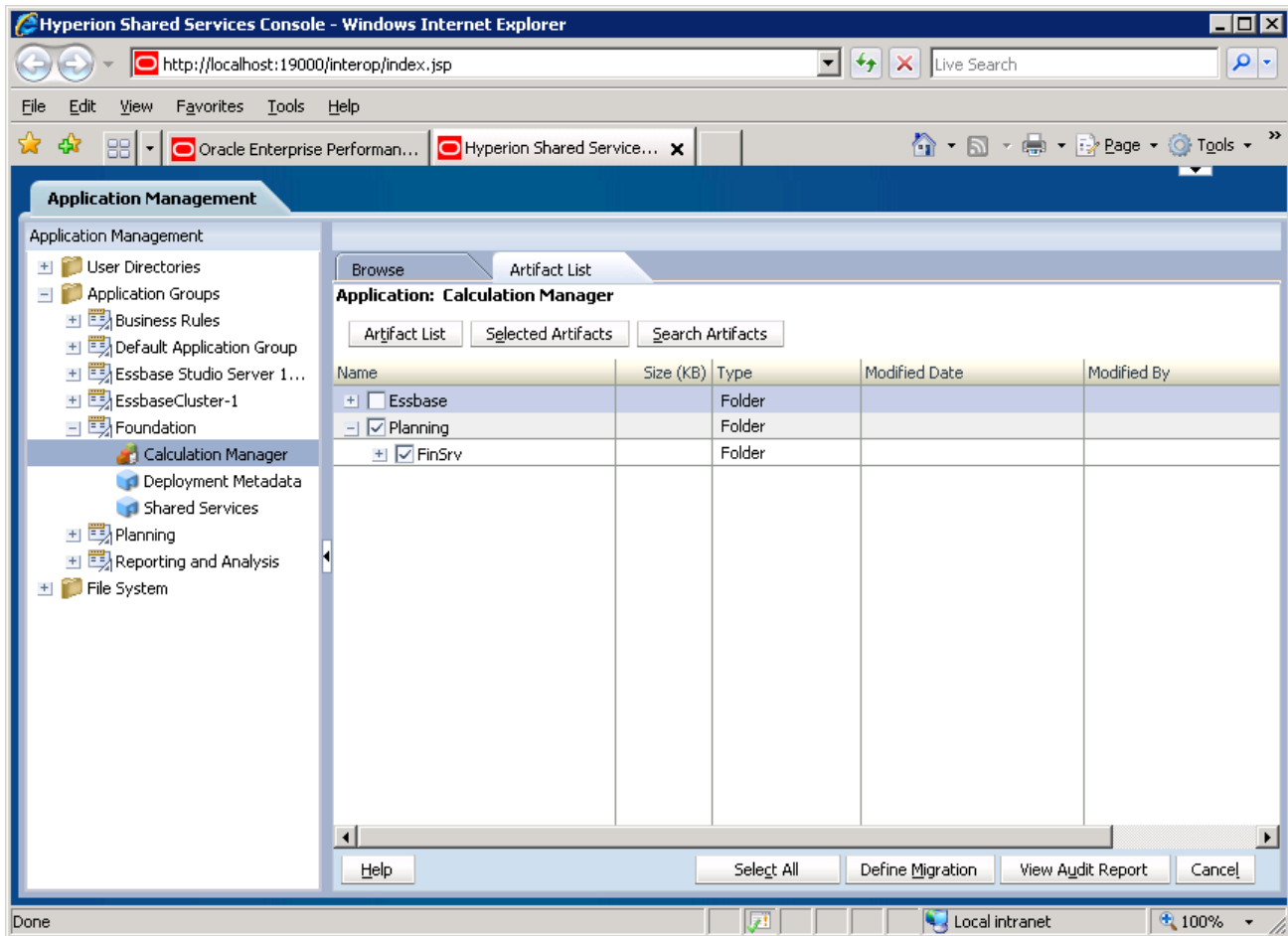
- 3 On the right pane, expand **Native Directory** and select the **Users** and **Groups** artifacts.
- 4 Expand the **Shared Services, Assigned Roles** for your Planning application, and select the Assigned Roles artifact named after the application, **FinSrv, EssbaseCluster-1, Reporting and Analysis**.

Your screen should look similar to the following:

The screenshot shows the Hyperion Shared Services Console interface. On the left, the 'Application Management' tree is expanded to show the 'Foundation' application group, with 'Calculation Manager' selected. The main area displays the 'Application: Shared Services' artifact list table.

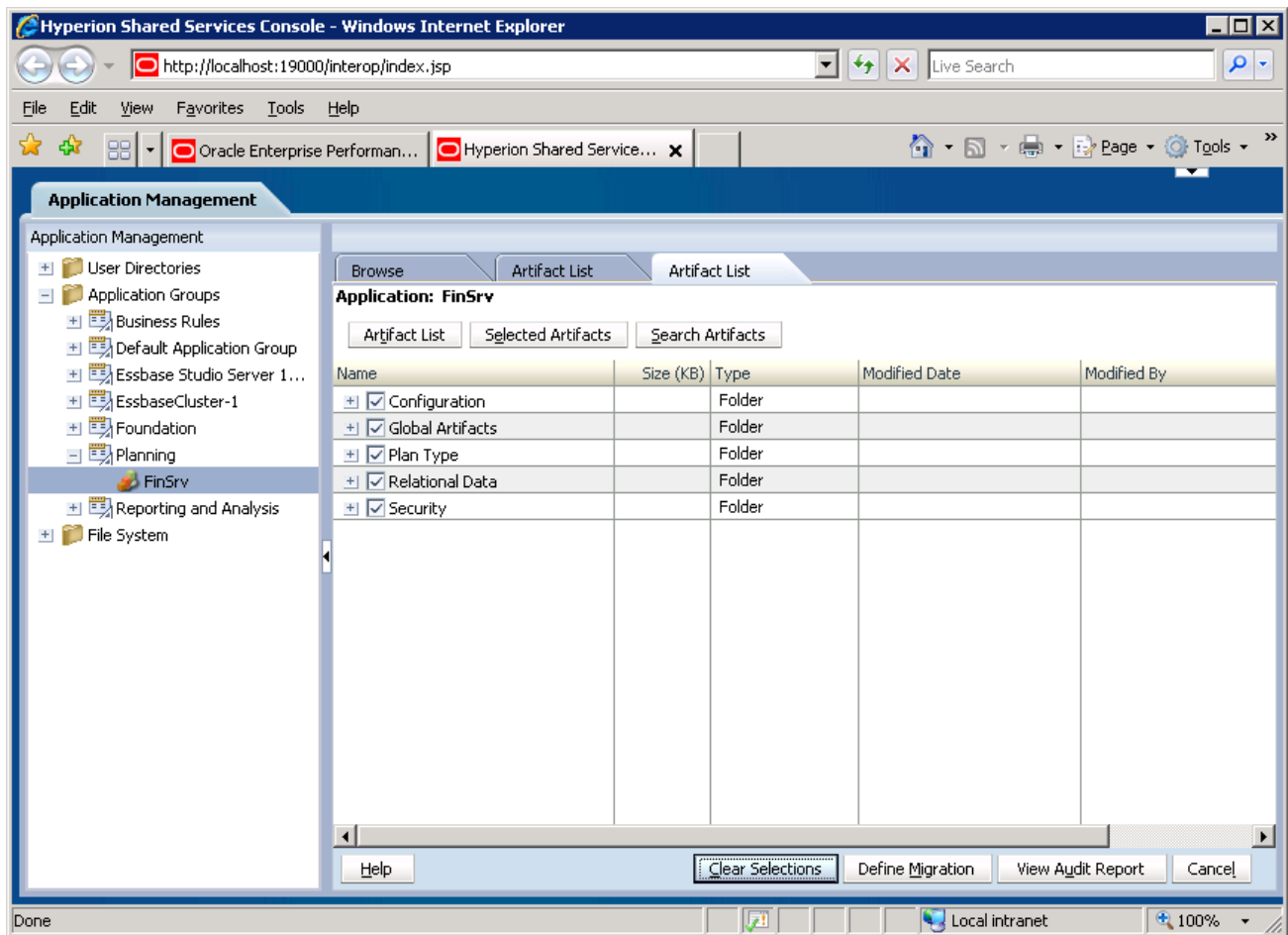
Name	Size (KB)	Type	Modified Date	Modified By	Description
<input type="checkbox"/> Native Directory		Folder			
<input type="checkbox"/> Assigned Roles		Folder	December 7, 2011		
<input type="checkbox"/> Business Rules		Folder	December 5, 2011		
<input type="checkbox"/> Essbase Studio Serv...		Folder	December 5, 2011		
<input type="checkbox"/> EssbaseCluster-1		Folder	December 5, 2011		
<input type="checkbox"/> ASOsamp		Assigned Roles	December 5, 2011		
<input type="checkbox"/> Demo		Assigned Roles	December 5, 2011		
<input type="checkbox"/> DMDemo		Assigned Roles	December 5, 2011		
<input checked="" type="checkbox"/> EssbaseCluster-1		Assigned Roles	December 5, 2011		
<input type="checkbox"/> Sampeast		Assigned Roles	December 5, 2011		
<input type="checkbox"/> Sample		Assigned Roles	December 5, 2011		
<input type="checkbox"/> Sample_U		Assigned Roles	December 5, 2011		
<input type="checkbox"/> Samppart		Assigned Roles	December 5, 2011		
<input type="checkbox"/> Foundation		Folder	December 5, 2011		
<input checked="" type="checkbox"/> Planning		Folder	December 7, 2011		
<input checked="" type="checkbox"/> FinSrv		Assigned Roles	December 7, 2011		
<input checked="" type="checkbox"/> Reporting and Analysis		Folder	December 5, 2011		
<input checked="" type="checkbox"/> Reporting and A...		Assigned Roles	December 5, 2011		
<input checked="" type="checkbox"/> Groups		Groups	December 7, 2011		
<input type="checkbox"/> Roles		Aggregated Roles	December 5, 2011		
<input checked="" type="checkbox"/> Users		Users	December 7, 2011		
<input type="checkbox"/> Taskflows		Folder			

- 5 On the left pane, expand the **Foundation** application group and select the **Calculation Manager** application.
- 6 On the right pane, expand **Planning**, and select the **FinSrv** application.



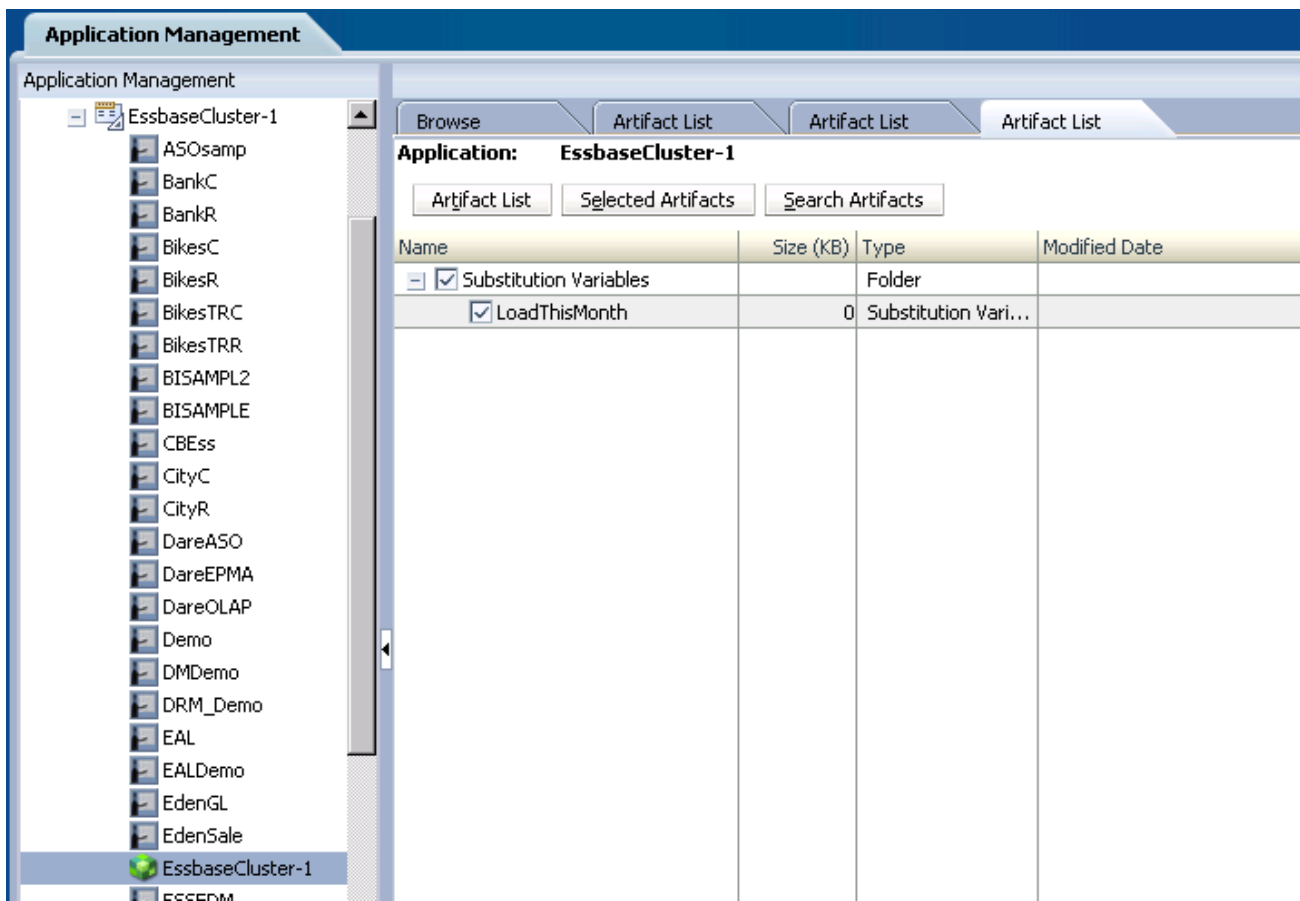
7 On the left pane, expand the **Planning** application group and select the **FinSrv** application.

You should be able to see all the artifacts of this application on right pane. Select all the artifacts.



- On the left pane, expand the **EssbaseCluster-1** application group and select the **EssbaseCluster-1** application.

You should now see Substitution Variables folder under EssbaseCluster-1. Select all the artifacts.

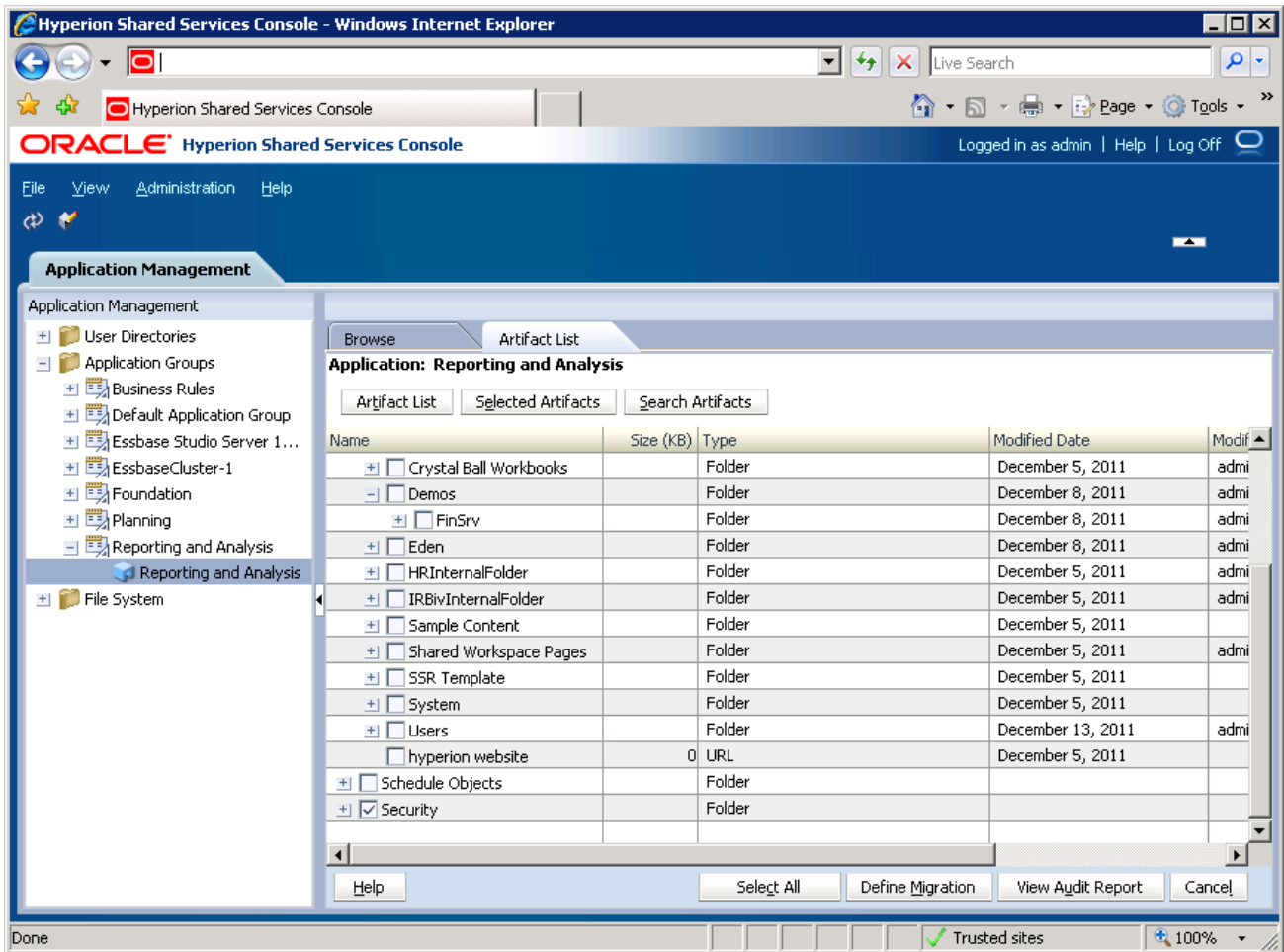


- 9 On the left pane, expand the **Reporting and Analysis** application group and select the **Reporting and Analysis** application.

You should now see all the Oracle Hyperion Reporting and Analysis artifacts.

- 10 On the right pane, expand **Repository Objects, Demos**, and select the **FinSrv** folder; then, expand **Security** and **Select All** users.

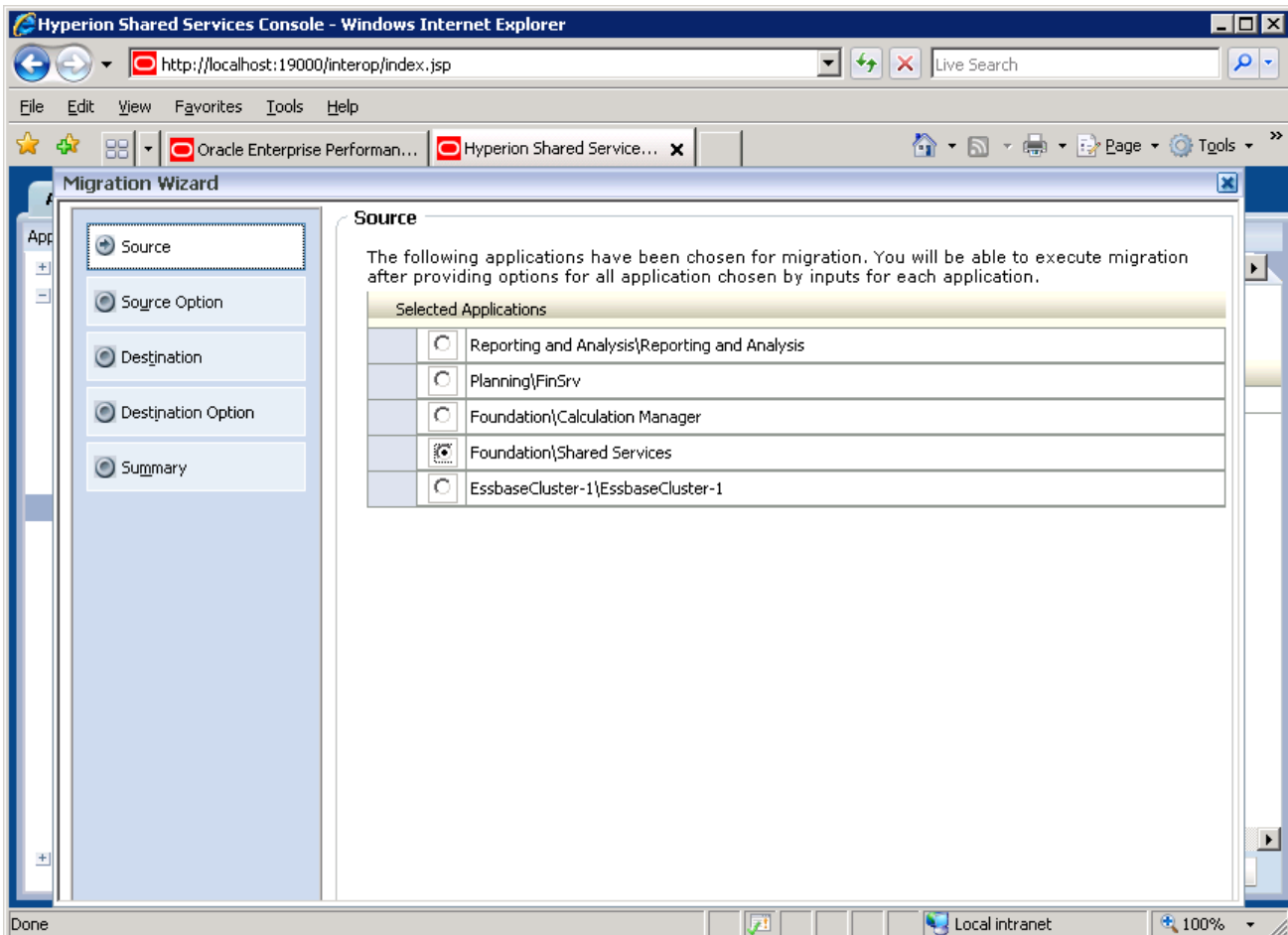
These are the Oracle Hyperion Financial Reporting artifacts related to the FinSrv application.



11 Click Define Migration to launch the Migration Wizard.



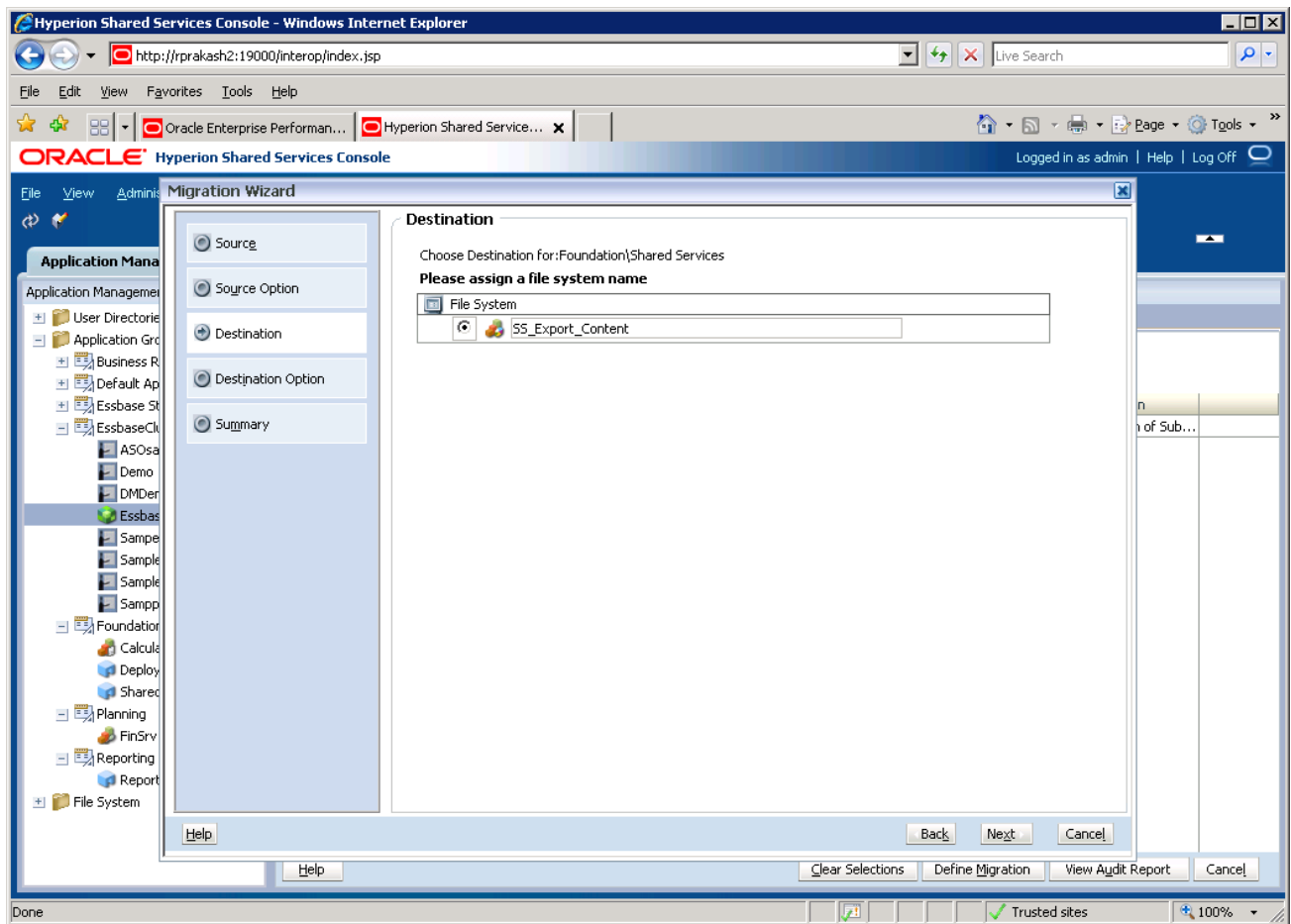
12 On the Source screen, select Foundation\Shared Services and click Next.



13 On the **Source Options** screen, leave the defaults and click **Next**.

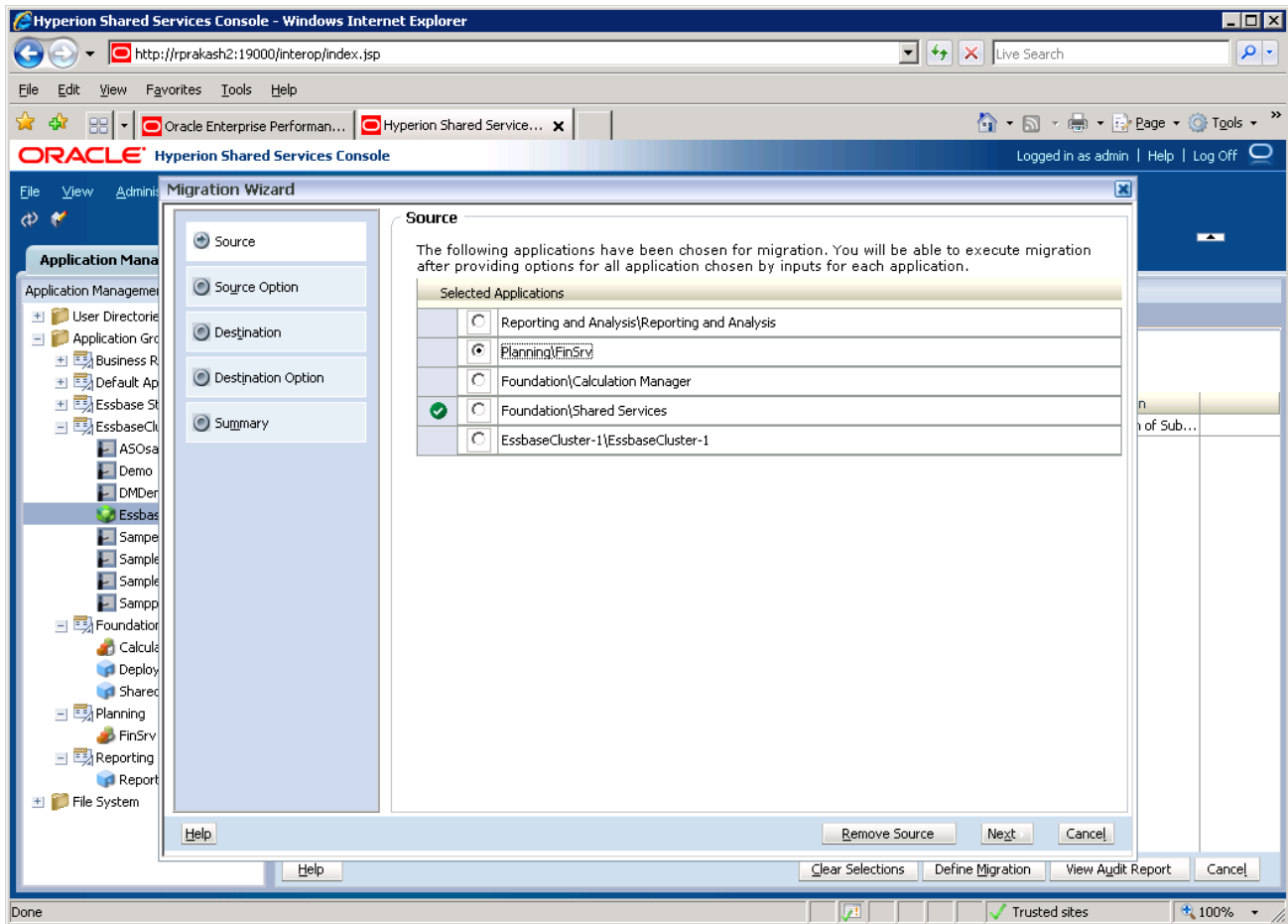
14 On the **Destination** screen, enter the file system folder name.

This is the location where the exported content will be moved. After entering the file system name, click **Next**.



15 On the **Destination Options** screen, leave the defaults and click **Next**.

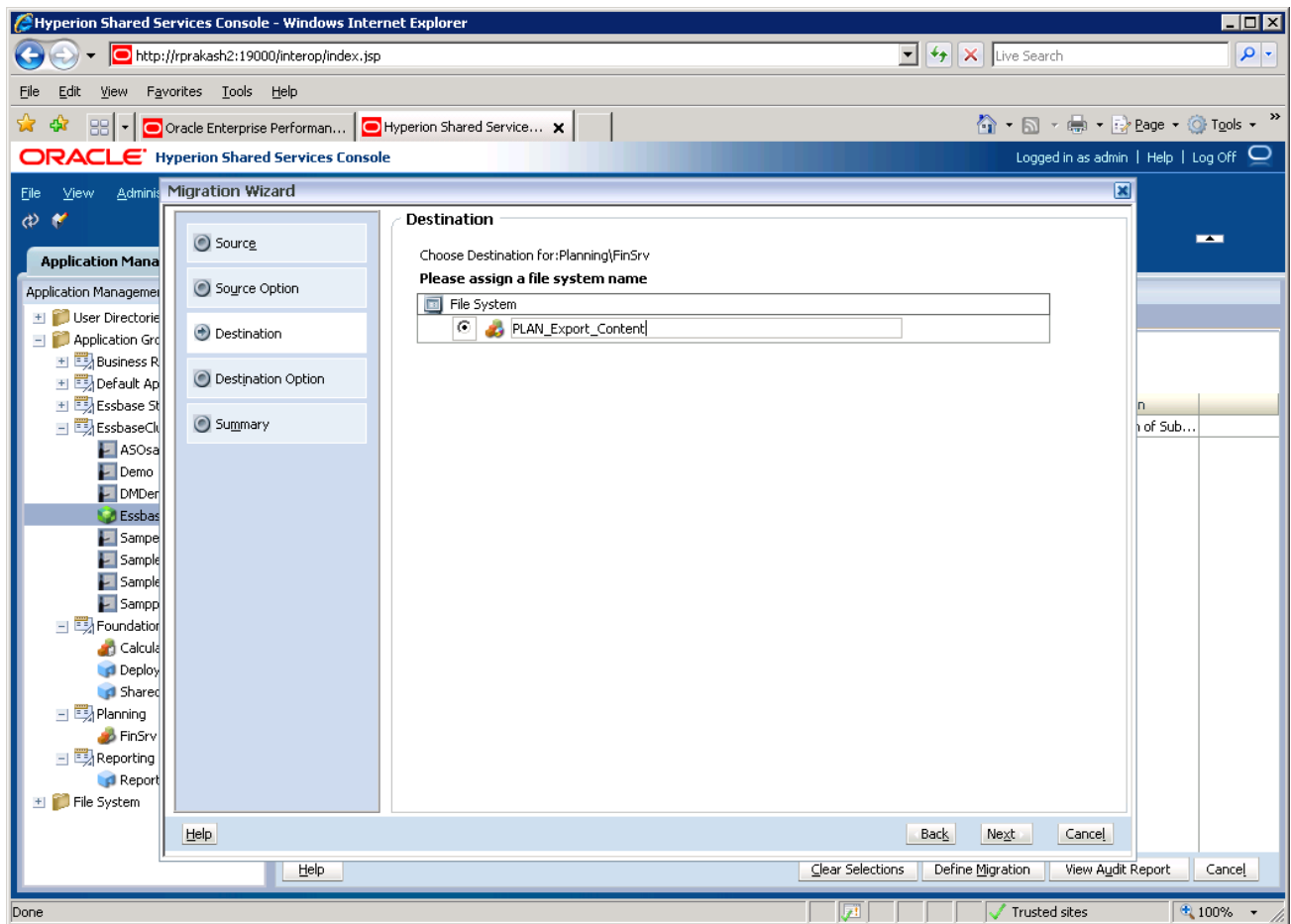
16 On the **Source** screen, select **Planning\FinSrv** and click **Next**.



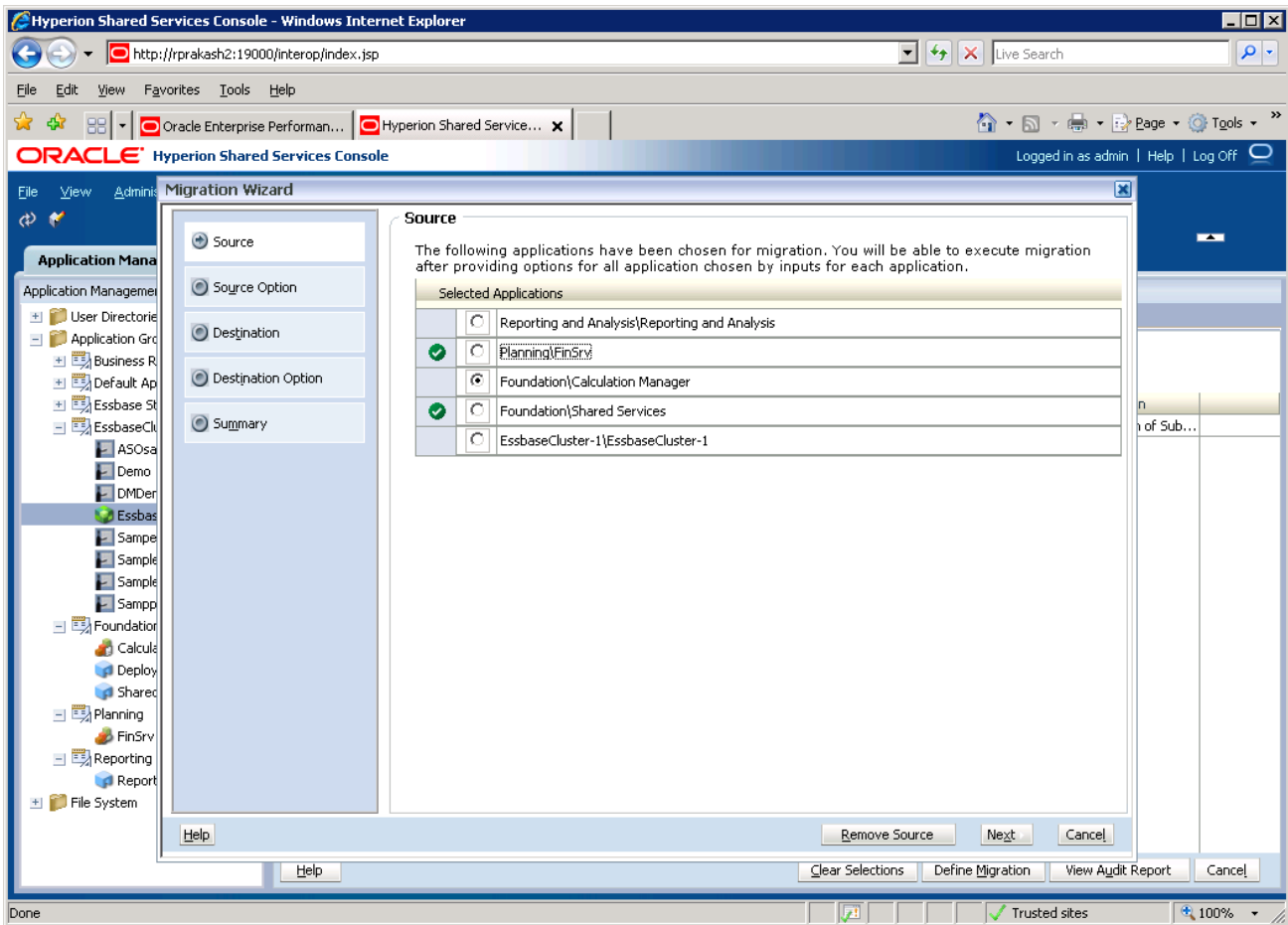
17 On the **Source Options** screen, leave the defaults and click **Next**.

18 On the **Destination** screen, enter the file system folder name.

This is the location where the exported Planning application content will be exported. After entering the file system name, click **Next**.



- 19 On the **Destination Options** screen, leave the defaults and click **Next**.
- 20 On the **Source** screen, select **Foundation\Calculation Manager** and click **Next**.

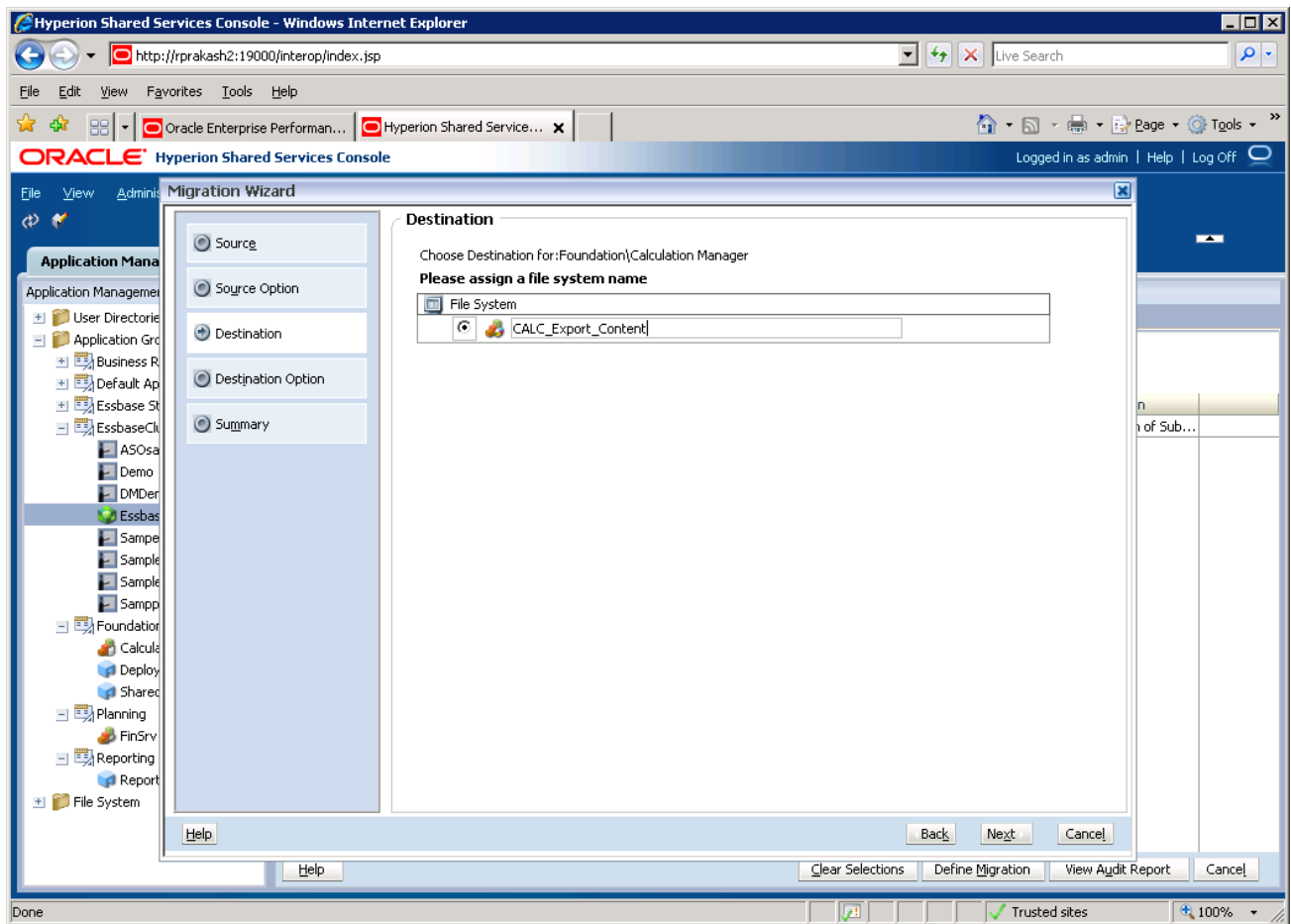


21 On the **Source Options** screen, leave the defaults and click **Next**.

Calculation Manager does not have any export options.

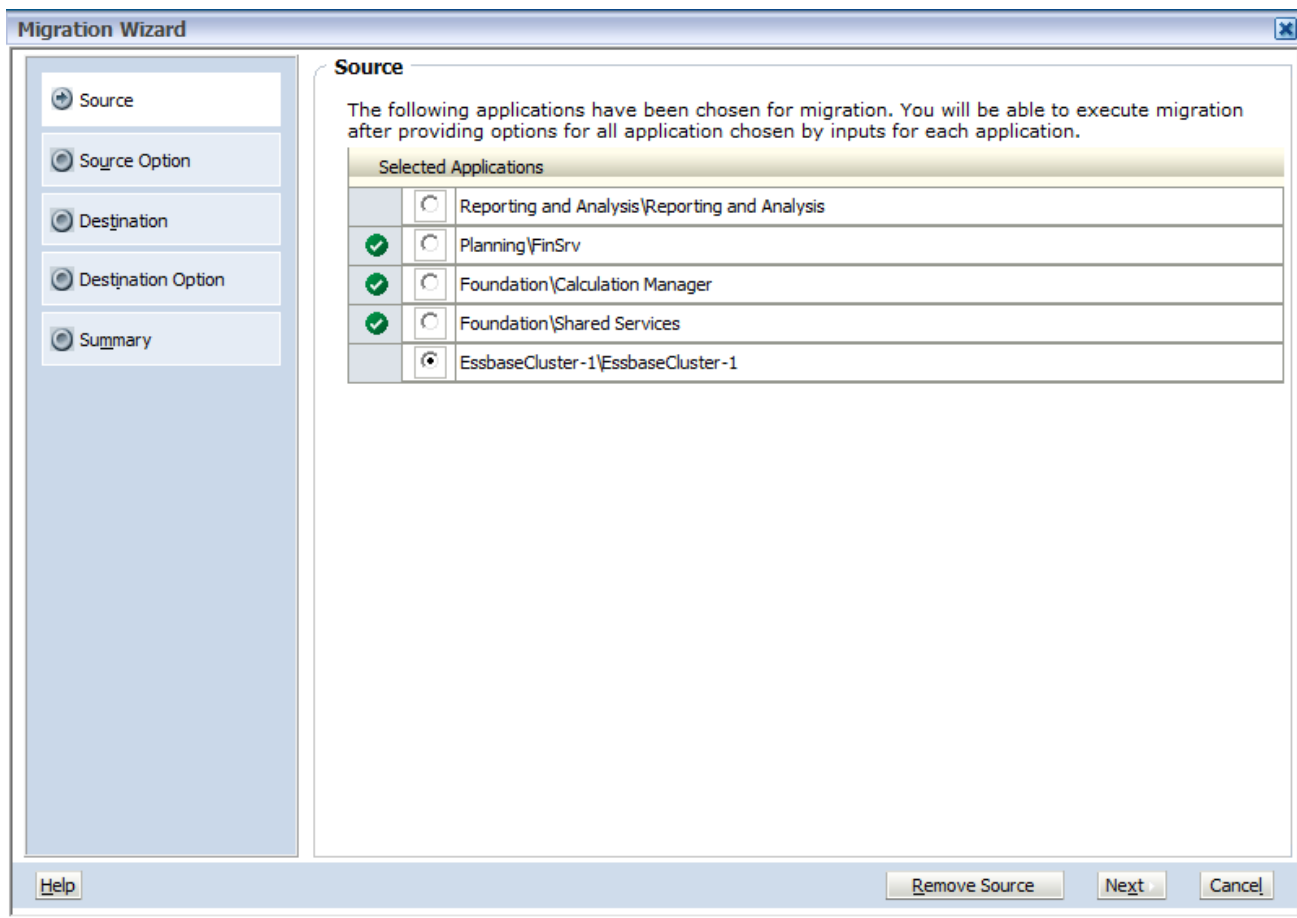
22 On the **Destination** screen, enter the file system folder name.

This is the location where the exported Oracle Hyperion Calculation Manager content will be moved. After entering the file system name, click **Next**.



23 On **Destination Options** screen, leave the defaults and click **Next**.

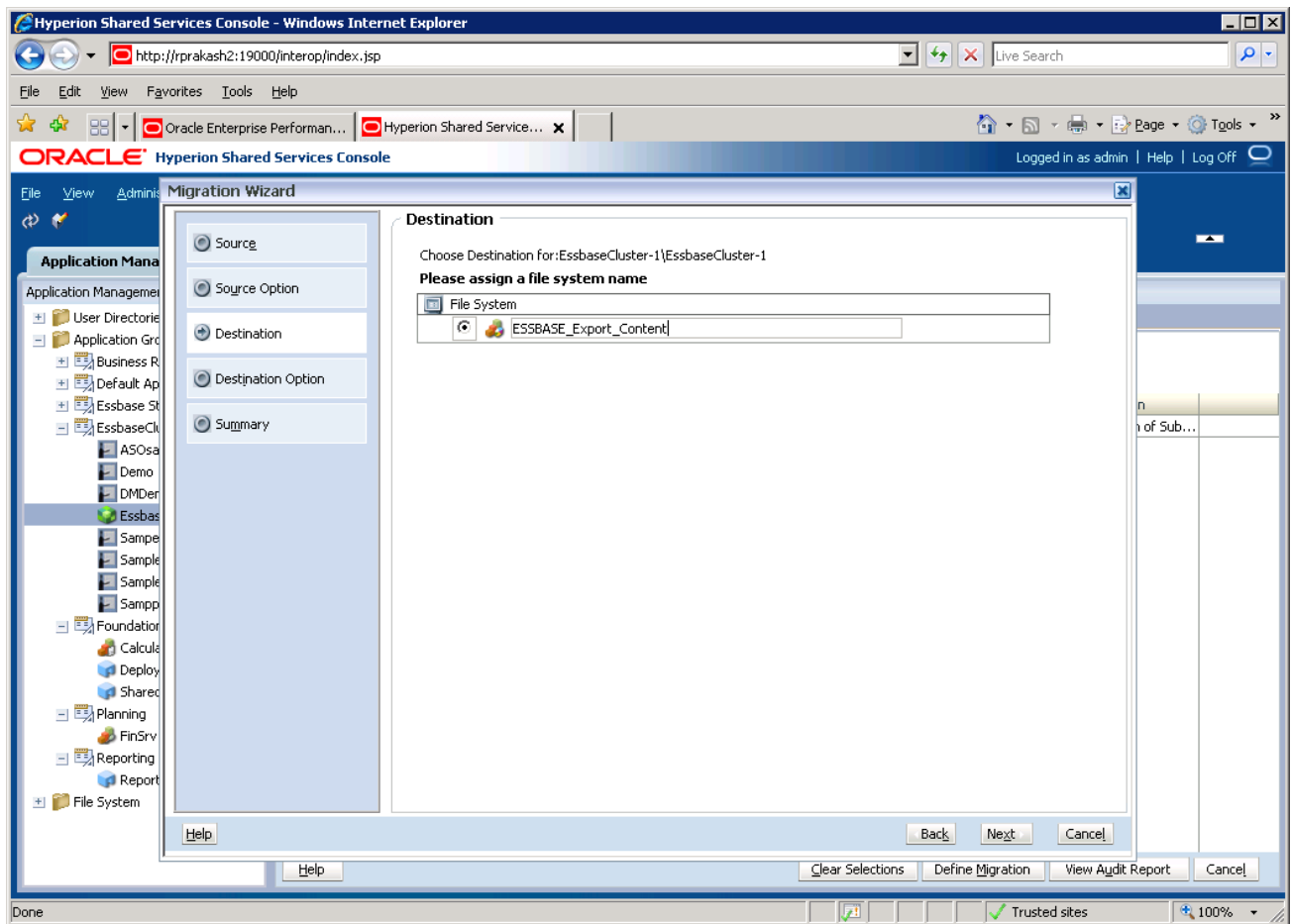
24 On the **Source** screen, select **EssbaseCluster-1\EssbaseCluster-1** and click **Next**.



25 On the **Source Options** screen, leave the defaults and click **Next**.

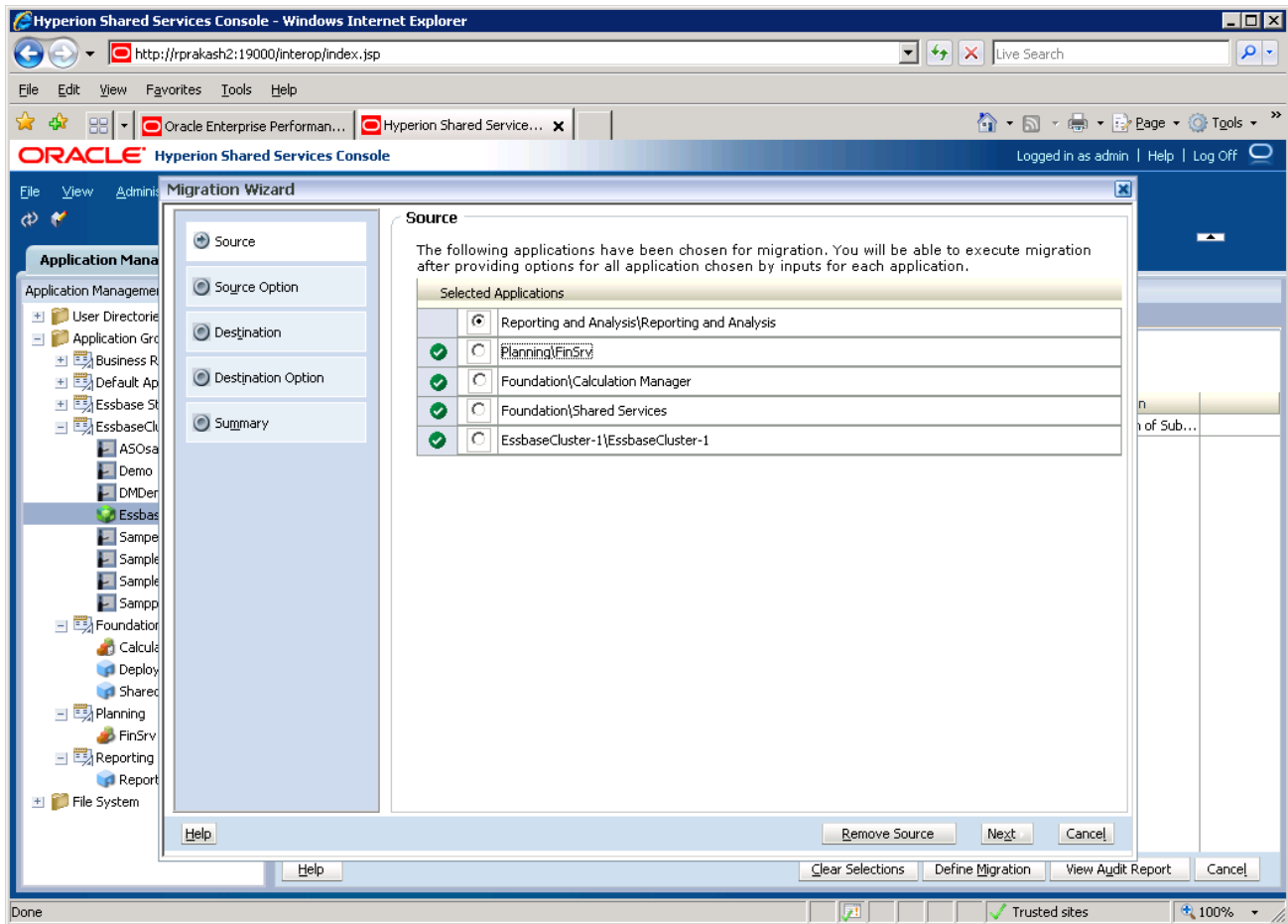
26 On the **Destination** screen, enter the file system folder name.

This is the location where the exported content will be moved. After entering the file system name, click **Next**.

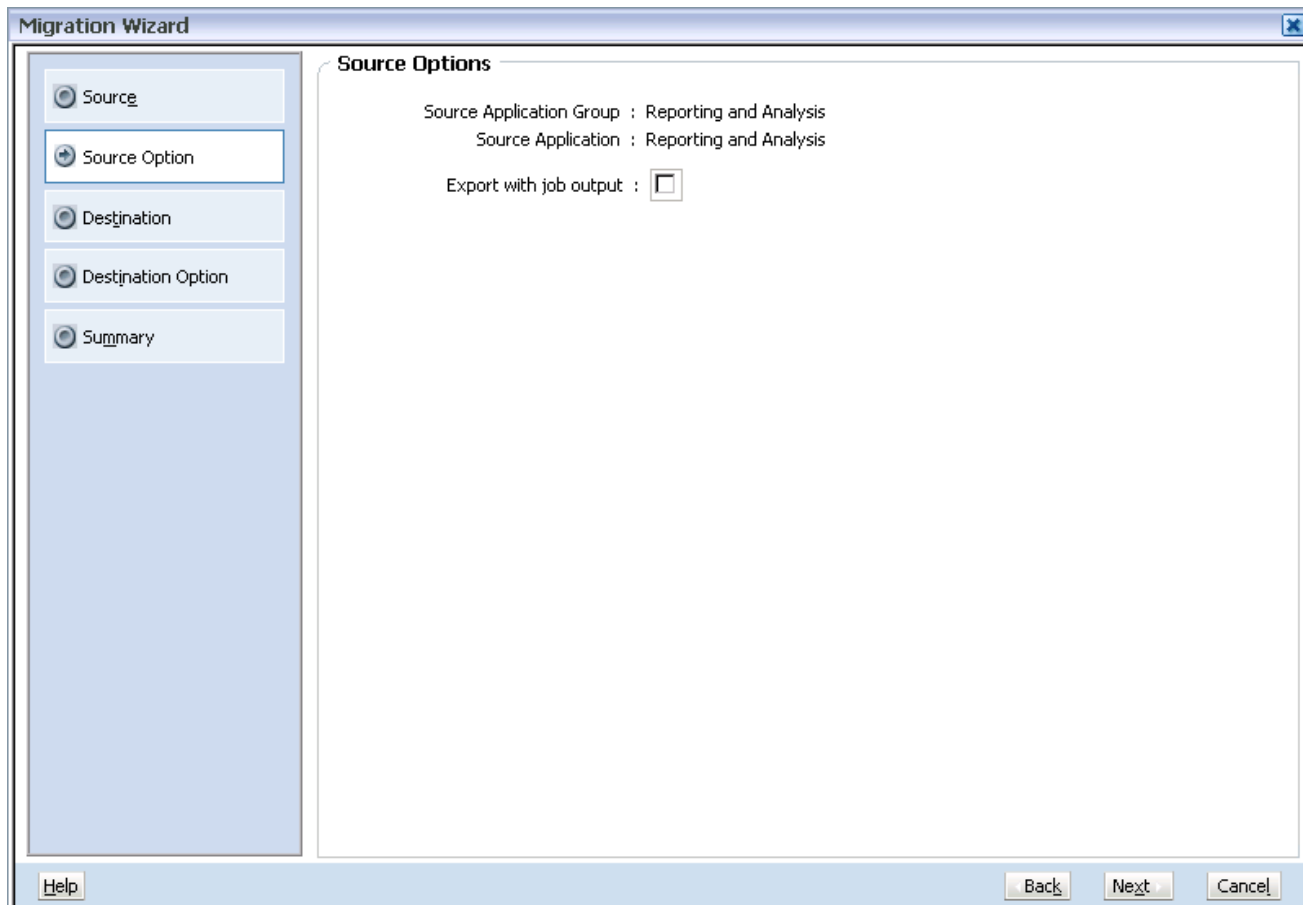


27 On the **Destination Option** screen, leave the defaults and click **Next**.

28 On the **Source** screen, select **Reporting and Analysis\Reporting and Analysis** and click **Next**.

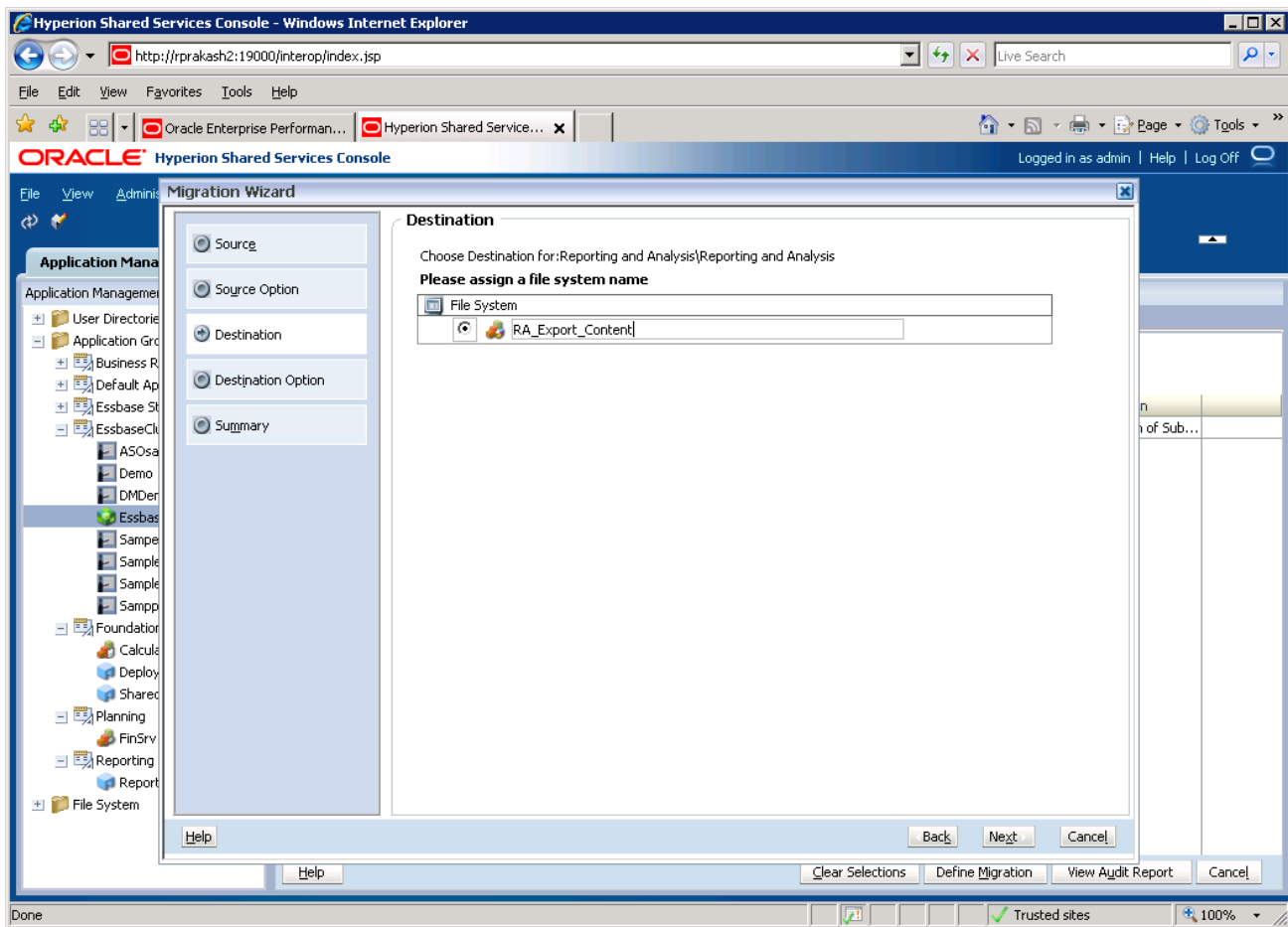


29 On the **Source Options** screen, unselect **Export with job output** and click **Next**.



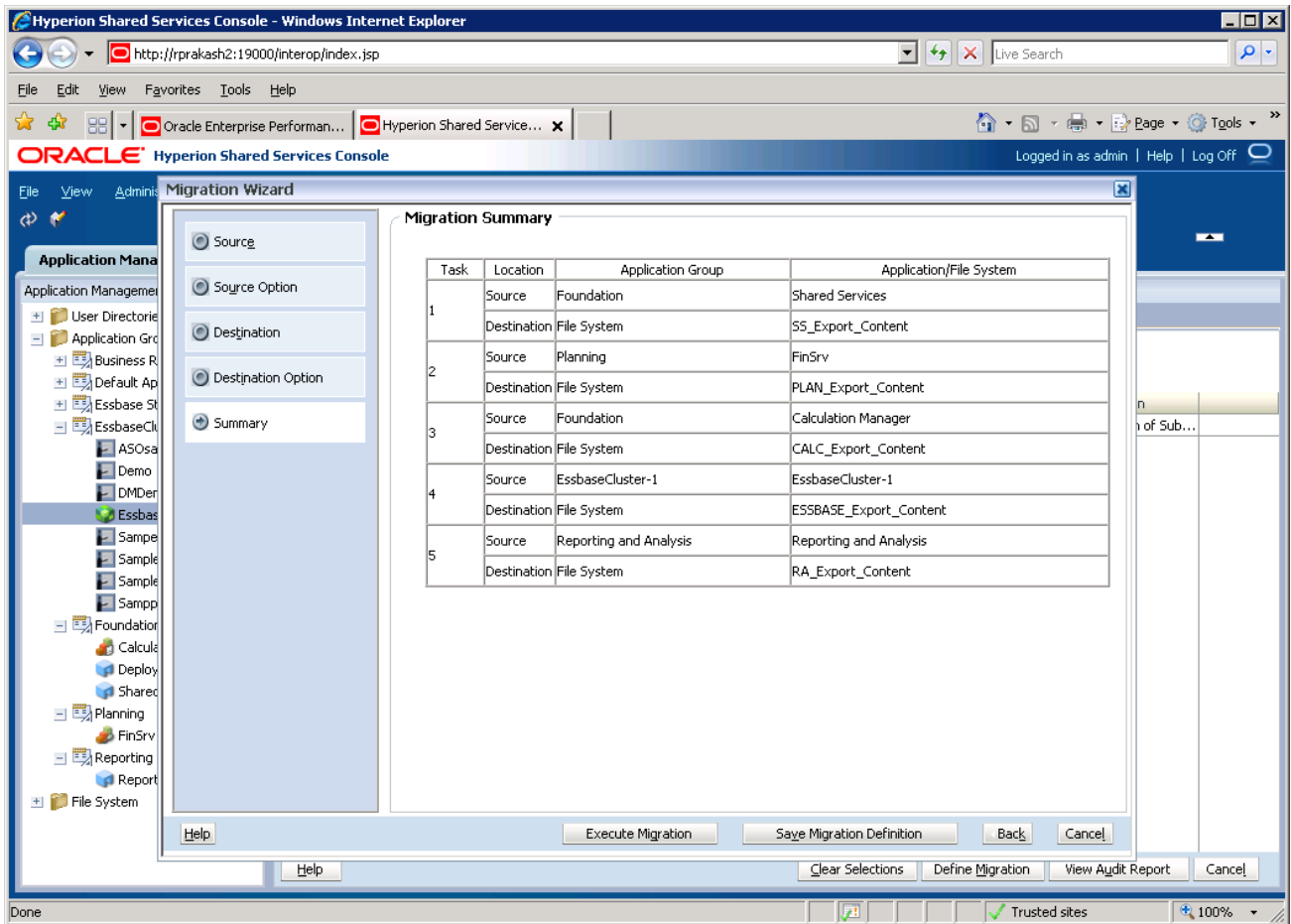
30 On the **Destination** screen, enter the file system folder name.

This is the location where the exported Oracle Hyperion Reporting and Analysis content will be moved. After entering the file system name, click **Next**.



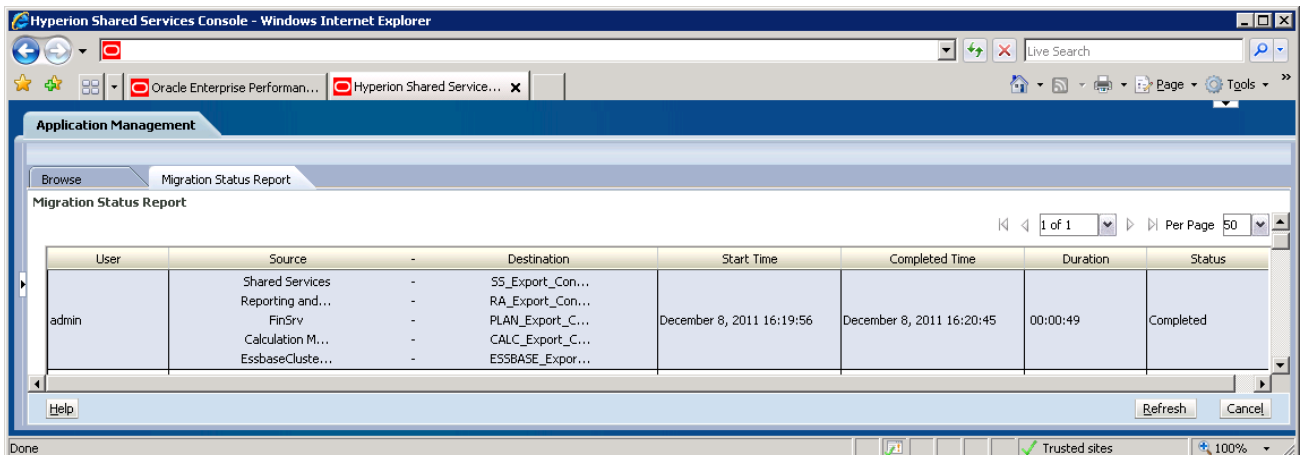
31 On the **Destination Options** screen, leave the defaults and click **Next**.

32 On the **Summary** screen, click **Execute Migration**.



33 In the Hyperion Shared Services Console - Information dialog box, click Launch Migration Status Report.

You should see the Migration Status Report. Wait for the migration to complete.



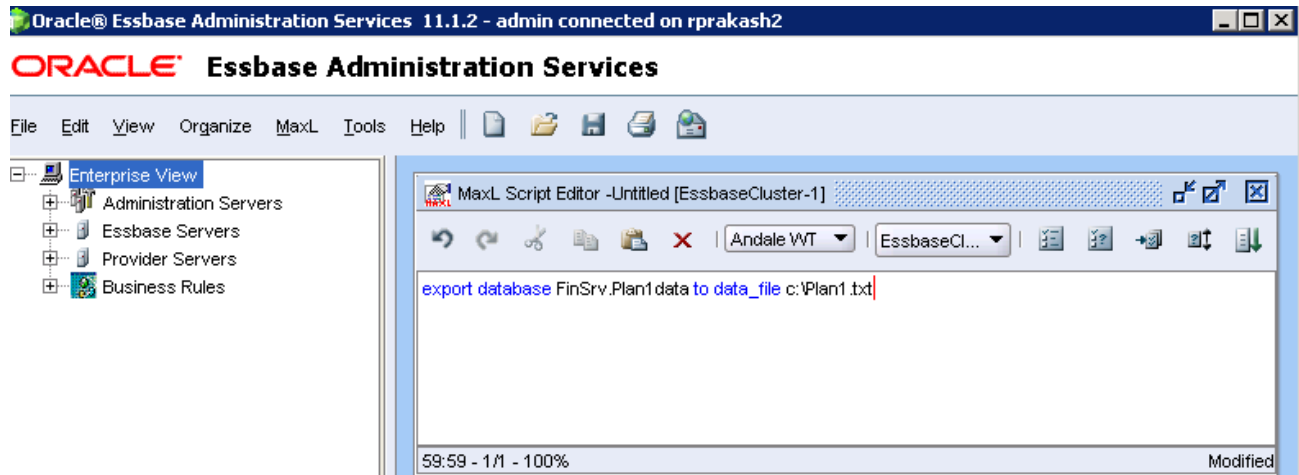
The migrated content(s) will be available at `<EPM_ORACLE_INSTANCE>/import_export/<username>@<provider>/`.

Step 2: Export Planning Essbase Data Using Essbase Administration Services Console

► To export Planning Essbase Data using Essbase Administration Services Console:

- 1 Launch Oracle Essbase Administration Services Console.
- 2 Select **File**, then **Editors**, and then **MaxL Script Editor**.
- 3 Execute the following command:

```
export database FinSrv.Plan1 data to data_file 'c:\Plan1.txt'
```



Step 3: Copy Essbase Report Scripts from the File System

► To copy Essbase Report Scripts from the file system:.

Copy the *.rep files from:

```
<EPM_ORACLE_INSTANCE>EssbaseServer\essbaseserver1\app\FinSrv\Plan1
```

to:

```
EssbaseServer\essbaseserver1\app\FinSrv\Plan1
```

This completes the process of using Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export and import content for Oracle Hyperion Planning applications.

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EPM System Migrating Oracle Hyperion Planning Applications, 11.1.2.1

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Authors: EPM Information Development Team

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