

Automate Migrations for Hyperion EPM

Introduction:

In any Oracle Hyperion Project, development is a critical step. After the successful code development, all the objects must be migrated from one environment to another Environment (DEV to QA and QA to PROD). This migration process is driven manually using the Hyperion Shared Services LCM.

In this article, we are going to bring into the spotlight the migration of objects using script-driven automation process. Before understanding the technical aspects of this automation process properly, it is important to understand the real-time manual process. Let's understand the complete migration cycle using an example of Hyperion Essbase and Planning.

Real Time Manual Migration Process:

In any project, we need to maintain a list of all the objects which need to be migrated in a Microsoft Excel sheet. This needs to be done before the code or script development. Below are the scenarios for migrations

- Entire application (Hyperion Essbase/Planning)
- Individual objects
- Multiple objects of same type (Calculation scripts or Rules files for Hyperion Essbase)
- Multiple objects of different types (Hyperion Planning objects/Hyperion Essbase objects)

The following figure explains manual process of migration that is generally followed in Hyperion projects.

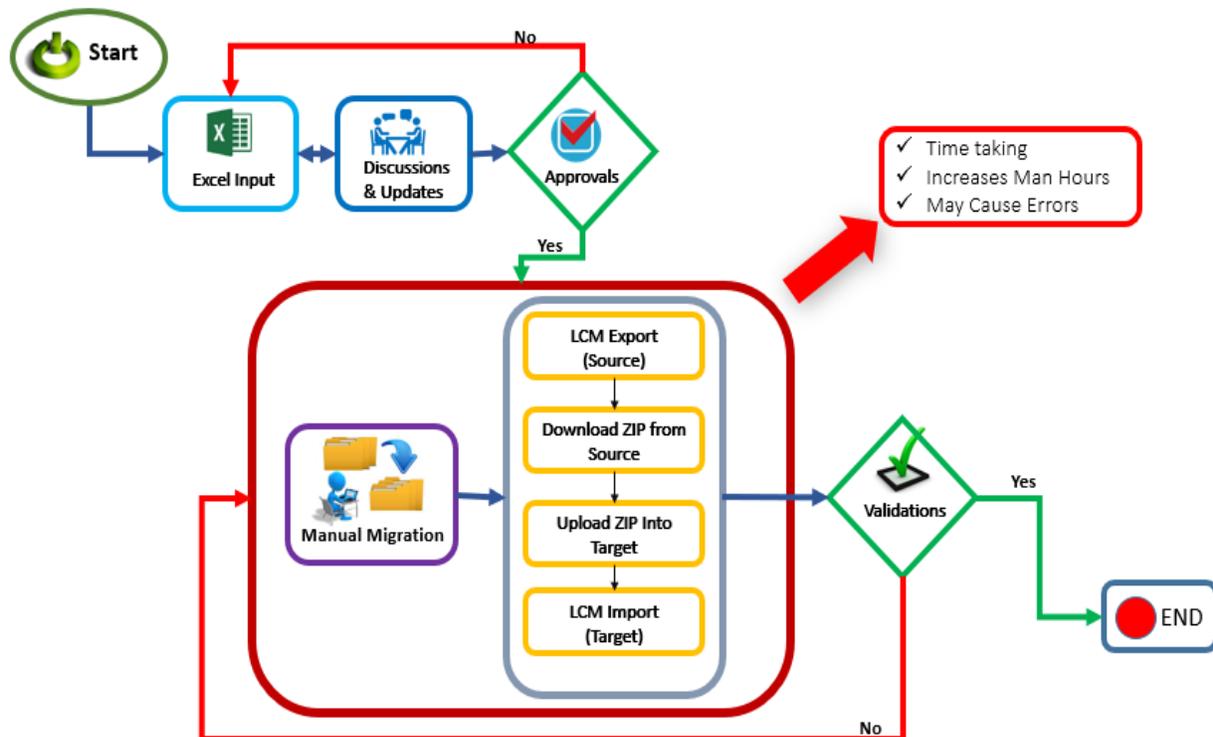


Figure 1: Manual Process of Migration

Explanation:

- Microsoft Excel is the base to capture the list of objects
- Approval
- Manual migration of objects for an individual product (Manual LCM Process)
- Validation
- Deploy to Target

Proposed Solution:

The template of earlier prepared Microsoft Excel sheet used to store objects that need to be migrated will come in handy to proceed with the proposed solution. Below diagram shows an area which has undergone automation in the process of migration.

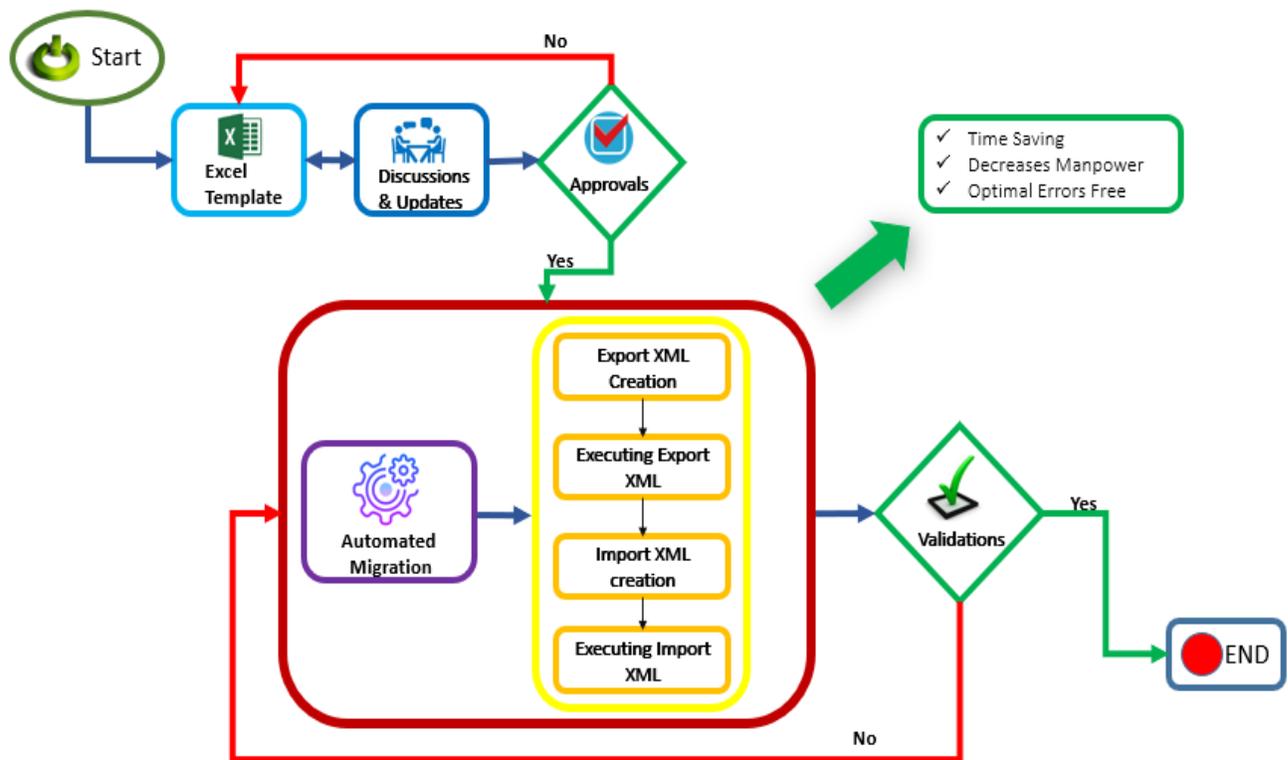


Figure 2: Proposed Solution

Explanation:

- **Approval Process:** Approvals are mandatory for any migration. This is the starting point for any automated migration process. The Microsoft Excel template contains a condition to run the migrations from source to target. The approver must give approval to further proceed with the migration process. We provide security on cell that can only be accessed by the approver.
- **Generate Export XML:** We have the process to build/generate an Export XML file from the excel template, which will be used to export the objects from the source system.
- **Export Objects:** Using LCM Utility, the objects are exported from source using the XML file generated from the above step. All exported objects are then kept in a centralized location.

- **Generate Import XML:** We have the process to build/generate Import XML file from the excel template/exported objects, which will then be used to import objects to the target system.
- **Import Objects:** Using LCM Utility, the exported objects are imported into the target system.
- **Validation of objects:** All the objects migrated into the Production environment are now validated. The probability of any possible error is close to zero in this approach.

Automated process built using following Scripting Languages:

1. Batch scripts
2. VBScripts
3. Maxl Scripts
4. Java scripts

Advantages:

- Reduction in execution time of migration
- Error free migration
- Single click migration of all objects from source to target
- Easy to validate
- Version maintenance

Version Maintenance:

Generally, before the deployment of code to the production environment, we maintain a copy of objects that were delivered at the time of migration. Using this automation process, we can maintain the object's version. These version files will be maintained in a centralized location and can be used for version management for that release. The additional benefit of using this process is that the manual backup of objects migrated to production is not required.

Conclusion:

The automated migration process tends to have more efficient and error-free migrations by using the known Excel template. This in turn, reduces the man-hours utilized in the manual migration process.

Contact us for Further Details

Suneel Kumar Kanthala

HYPERION Manager

suneelk.in@mouritech.com

MOURI TECH LLC

www.mouritech.com

