
Oracle® Hyperion Profitability and Cost Management, Fusion Edition

Upgrade Appendix

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About This Upgrade Appendix

This document provides instructions to upgrade from existing 11.1.1.1.08 releases of Profitability and Cost Management to Release 11.1.1.3.00.

There are two options available for upgrading to Release 11.1.1.3.00:

- An In-Place Upgrade upgrades the code and schema of the Profitability and Cost Management product to the new release on the same server, leaving existing data and applications intact.
- An Out-of-Place Upgrade upgrades only the code and schema in an alternative environment. The new environment may be on a different server, or on the same server if clear namespace separation is maintained through environment variables. The applications and data are not updated. The user must transfer model artifacts to load the data and applications from the old environment to the new environment.

Prerequisites

- Before beginning this upgrade, ensure all EPM Suite components have been upgraded to release 11.1.1.3.00:
 - Shared Services
 - Workspace
 - Essbase (Provider Services and Essbase server and client, EAS)
 - EPM Architect.

Refer to the appropriate Readmes for each product for instructions on upgrading.

- Before beginning this upgrade, you must ensure that Profitability and Cost Management version has been upgraded to release 11.1.1.1.08.

Note: If you are using pre-11.1.1.1.08 versions, see the *Oracle Hyperion Profitability and Cost Management Readme* release 11.1.1.1.08 for instructions to upgrade to 11.1.1.1.08.

Performing an In-Place Upgrade

An in-place upgrade keeps the applications and data intact while upgrading the code and schema.

To upgrade the application, with data and applications intact:

1. Perform a full system backup, including EPM Architect and the Profitability and Cost Management databases.
2. Upgrade the inventory for existing components using the following steps:
 - a) Rename **HYPERION_HOME/inventory** to **backup**.
 - b) Delete the **EPMSysSystem** line from central inventory, e.g.
c:\programfiles\oracle\inventory\ContentsXML\inventory.xml
 - c) Run **HYPERION_HOME/OPatch/createInventory** to restore the inventory folder.
3. Upgrade the code and schema to 11.1.1.3.00 for the EPM suite:
 - Performance Management Architect
 - Profitability and Cost Management
 - Essbase (Provider Services and Essbase server and client, EAS)
 - Shared Services

For instructions, see the *Profitability and Cost Management Readme* for Release 11.1.1.3.00.

CAUTION: The following limitations apply to this upgrade process:

- Essbase custom artifacts, such as pre- and post-scripts, must be migrated individually.
 - Essbase custom outline settings must be adjusted in the new ASO and BSO cubes.
4. Upgrade the following components to the latest Release 11.1.1.3.xx release:
 - Performance Management Architect
 - Profitability and Cost Management
 - Essbase (Provider Services and Essbase server and client, EAS)
 - Shared Services

5. Use the new models in the upgraded environment.

Performing an Out-of-Place Upgrade

An out-of-place upgrade means that the code and schema only are created in a new environment. Applications and data are not maintained during the upgrade.

To upgrade the code and schema only on a new environment:

1. Perform a fresh installation of the code and schema for individual components of Profitability and Cost Management using the Release 11.1.1.3.00 EPM Suite Installer:
 - Performance Management Architect
 - Profitability and Cost Management
 - Essbase (Provider Services and Essbase server and client, EAS)
 - Shared Services
2. Upgrade the following components to the latest Release 11.1.1.3.xx release:
 - Performance Management Architect
 - Profitability and Cost Management
 - Essbase (Provider Services and Essbase server and client, EAS)
 - Shared Services
3. Move data from the Release 11.1.1.1.08 environment to the new Release 11.1.1.3.00 environment, as follows:
 - a. Export the Performance Management Architect artifacts (Shared and Local dimensions) from the 11.1.1.1.08 environment. See the *Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide* for instructions.
 - b. Import the Performance Management Architect artifacts (Shared and Local dimensions) into the latest Release 11.1.1.3.xx environment using Lifecycle Management. See the *Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide* for instructions.
 - c. Deploy the applications from Performance Management Architect to Profitability and Cost Management.

- d. Export the Profitability and Cost Management applications from the 11.1.1.2.07 environment, using Lifecycle Management.
- e. Import the Profitability and Cost Management applications into the new Release 11.1.1.3.00 environment using Lifecycle Management.

Caution: Before initiating the import, verify that the Essbase server is valid and accessible.

If it is not accessible, enter the correct Essbase server name in the Profitability and Cost Management Model Preferences screen:

- i. From Task Areas, go to **Manage Model**, then **Model Summary** and select the **Model Level Preference tab**.
- ii. Under **Essbase Information**, enter the name of the valid and accessible **Host**, and modify any other connection information required.

For additional information, refer to the *Oracle Hyperion Profitability and Cost Management User's Guide*.

- f. Select the option you require to deploy to Essbase:
 - Use **Method A** to deploy without retaining the calculated and genealogy data:
 1. Import input and driver data.
 2. Calculate and run genealogy.
 3. If you have Essbase custom artifacts and settings, perform the following tasks:
 - Migrate Essbase custom artifacts, such as pre- and post-scripts, individually.
 - Adjust Essbase custom outline settings in the new ASO and BSO cubes.
 - Use **Method B** to deploy and retain previous calculated data and genealogy data:
 1. Export Essbase data, custom calc scripts and other artifacts from Release 11.1.1.1.08 environment.
 2. Import Essbase data, custom calc scripts and other artifacts to Release 11.1.1.3.00 environment.
- g. Use the new models in the upgraded environment.

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