



## Atlanta Hyperion User Group

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Migrating to Oracle Hyperion Planning version 11x  
Decision process,  
Upgrade implementation experience,  
& Resulting Benefits

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# Migrating to Planning 11

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- **Introductions**
- Overview
- Installation Process
- Migration Process
- Lessons Learned
- What the Future Holds in store



## Drummond Company, Inc

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- Principally engaged in the business of mining, purchasing, processing and selling of coal and coal derivatives
- Controls more than 2 billion tons of Coal reserves
- Shipped approximately 30 million tons of coal in 2008
- U.S. mining operations in Alabama
- International mining in Colombia, serving customers in the U.S. & Europe
- Largest merchant coke producer in the U.S.
  - ABC Coke has 132 ovens
  - Annual capacity of 750,000 tons of saleable coke



## About Ranzal

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- **Founded in 1996, Ranzal has implemented Oracle / Hyperion solutions for 500+ companies (800+ projects since the acquisition)**
- **Oracle / Hyperion Certified Advantage Partner - Highest Status**
- **Hyperion “Americas Reseller / Partner of the Year”**
  - › 1999, 2005 & 2007
- **Certified EPM Consultants & Instructors**
- **Vertical Expertise with High-Profile Clients from Coast to Coast**
  - › East Coast & West Coast Presence
- **Sound Project Methodology Insures Project Success**
  - › Support Business Applications from start to finish
- **One of the Largest Hyperion Practices in the U.S.**
- **“Best Planning Practice with Best HFM Practice”**
  - › Hyperion Development utilizes Ranzal for Planning, Essbase and HFM product direction

**RANZAL**

*Regarded in the industry as one of the "BEST" at leveraging OLAP technology to develop EPM Applications*



# Migrating to Planning 11

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- Introductions
- **Overview**
- Installation Process
- Migration Process
- Lessons Learned
- What the Future Holds in store



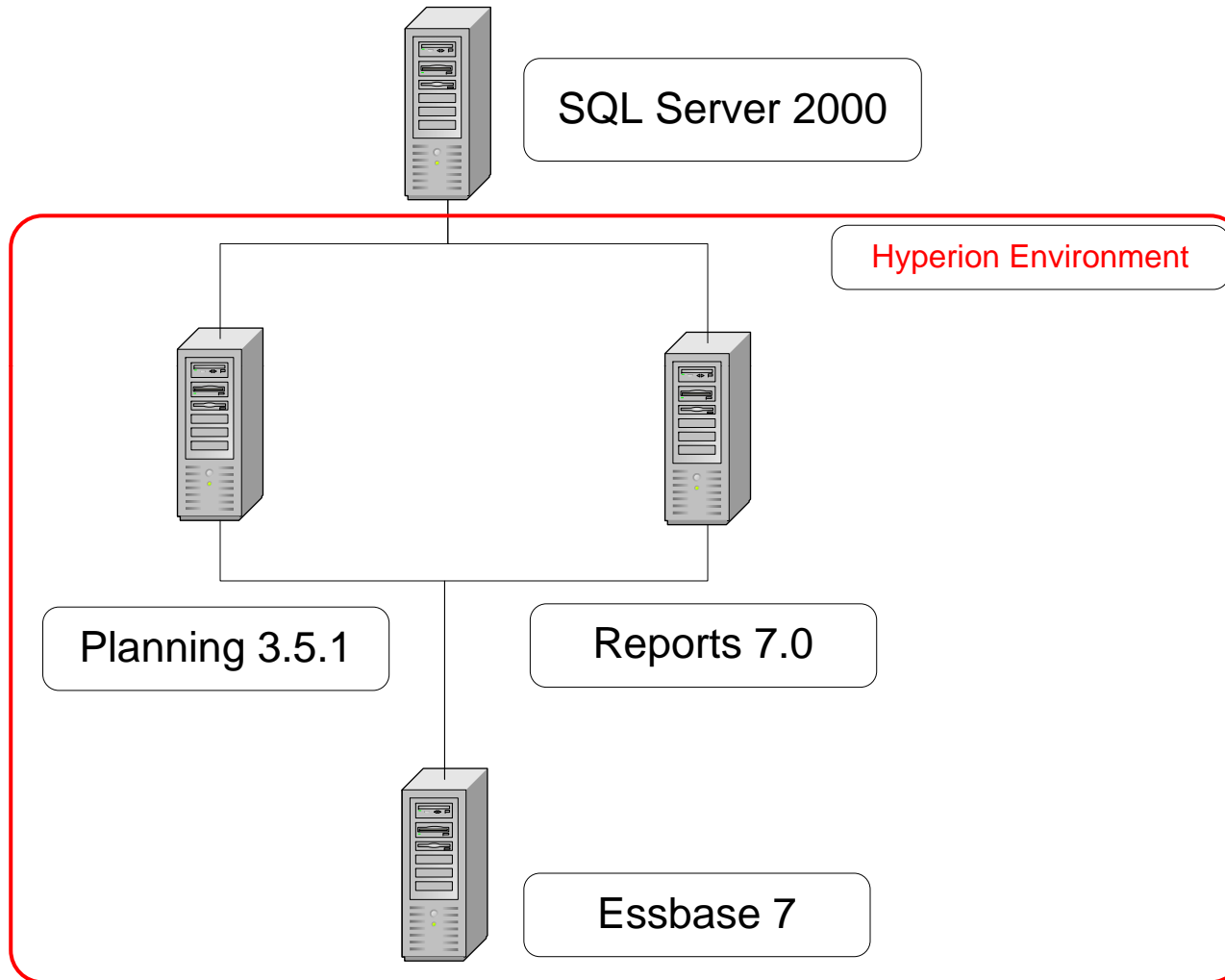
## Why Upgrade?

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- Support on older versions is being eliminated
- New version supports the latest versions of Microsoft Office
- Coincides with upgrade of backend SQL DB (SQL Server)
- Coincides with replacement of existing hardware
  - Plan to run this in a virtual environment
- Provides opportunity for training IT / backup admins
- Allows for future growth / new Planning database

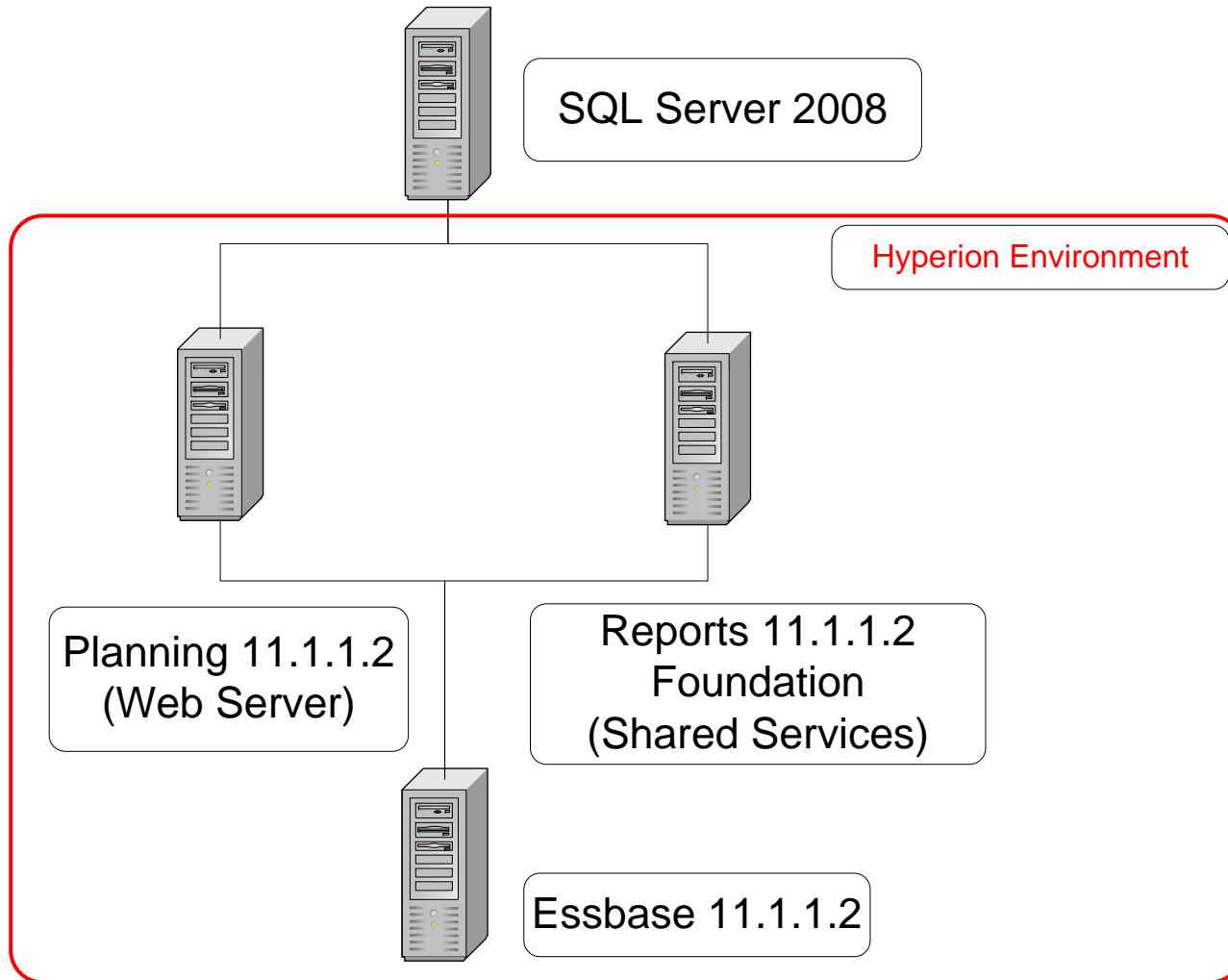


# The “Big Picture” - Existing





# The “Big Picture” – After





# Hyperion Planning 3.5.1

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- Security
  - Separate users / groups maintained within Planning
    - Planning users listed in Essbase as \_UserIDs
- Forms
  - 205 Forms
    - Some options on 11.1.1.2 forms were not available in 3.5.1 forms



# Hyperion Reports 7.0

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- Security
  - Separate users / groups maintained within Reports
    - Users can be synchronized with Essbase
  
- Reports
  - 473 Reports
    - Some reports contained incorrect syntax that would still work in Reports 7.0, but they would not work in Reports 11.1.1.2
    - This was not the latest 7.x version
      - Some bugs were fixed in later releases of 7.x



# Essbase / Business Rules

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- Security
  - No users accessed Essbase from the Excel add-in
    - Only finance admin
- Business Rules
  - Most Business Rules were graphical
    - Needed to ensure migration allowed these to remain graphical
  - Used sequences and sequences of sequences
- Calc Scripts
  - Mostly straight aggregation calc scripts



# Migrating to Planning 11

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- Introductions
- Overview
- **Installation Process**
- Migration Process
- Best Practices
- Lessons Learned
- What the Future Holds in store



# Installation Process

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- Licensing

- All of the Oracle / Hyperion Licensing for the new version was in order before the project start date
  - Including Production and Development
- 3<sup>rd</sup> Party Licenses
  - Only one Web Server – Less than 50 users planned initially
  - Weblogic was used, license was setup before the installation consultant arrived



# Installation Process

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- Licensing
- Hardware Environment
  - Hardware / Software configuration meeting before project started
    - 64 bit environment, with (4) CPU Essbase in virtual environment
  - New Production environment built on new servers
    - A naming convention was agreed upon and written on a board during the installation process
    - A server alias of “Budget” was setup using IIS on the web server
      - Consider timing of migrating alias names during an upgrade



# Installation Process

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- Licensing
- Hardware Environment
- Download the software
  - Downloading the software and moving it between servers / environments can take a long time. It is best to have the software downloaded, unzipped and ready to go



# Installation Process

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- Licensing
- Hardware Environment
- Download the software
- Relational Repositories
  - Ensure the SQL DBA is involved
    - Ensure proper security is granted
    - Setup a backup schedule early in the process
  - LCM export to files offer another alternative



# Installation Process

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- Licensing
- Hardware Environment
- Download the software
- Relational Repositories
- Dedicated IS employee available during production install
  - Performed Development install during the following week
  - Due to high level of skill, most questions encountered during the install were answered in record time
  - When 11.1.1.3 patch was needed, they were able to install it with minimal outside help



# Migrating to Planning 11

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- Introductions
- Overview
- Installation Process
- **Migration Process**
- Lessons Learned
- What the Future Holds in store



# Migration Process

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- Backup existing Production
  - As a precaution, backed up existing production environment (including SQL Server) before beginning work



# Migration Process

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- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions



# Migration Process

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- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
    - Created automation scripts to aid in future updates
    - Validated all dimensions were identical



# Migration Process

---

- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
  - Used migration of **Business Rules**
    - Ensured they were in proper Project Folders



# Migration Process

---

- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
  - Used migration of Business Rules
  - Migrated Planning forms
    - Had to manually verify / choose some settings
    - Ensure Business Rules run on save properties were correct



# Migration Process

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- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
  - Used migration of Business Rules
  - Migrated Planning forms
  - **Migrated Reports**
    - Initial migration attempt failed due to a bug in 7.0 release of Reports



## Migration Process

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- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
  - Used migration of Business Rules
  - Migrated Planning forms
  - Migrated Reports
- Setup new Security scheme to minimize manual maintenance
  - Setup Groups for each type of user
  - Setup “All Users” group



## Migration Process

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- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
  - Used migration of Business Rules
  - Migrated Planning forms
  - Migrated Reports
- Setup new Security scheme to minimize manual maintenance
- Optimized / Tuned Essbase for 11.1.1.2 / 64 bit environment
  - Business Rules ran almost twice as fast



## Migration Process

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- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
  - Used migration of Business Rules
  - Migrated Planning forms
  - Migrated Reports
- Setup new Security scheme to minimize manual maintenance
- Optimized / Tuned Essbase for 11.1.1.2 / 64 bit environment
- **Setup backup automation for tape & Essbase scripts**



## Migration Process

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- Backup existing Production
- Created a new environment in 11.1.1.2
  - Manually built small dimensions
  - Used Outline Load Utility for bigger dimensions
  - Used migration of Business Rules
  - Migrated Planning forms
  - Migrated Reports
- Setup new Security scheme to minimize manual maintenance
- Optimized / Tuned Essbase for 11.1.1.2 / 64 bit environment
- Setup backup automation for tape & Essbase scripts
- **Testing / Training**



# Migrating to Planning 11

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- Introductions
- Overview
- Installation Process
- Migration Process
- **Lessons Learned**
- What the Future Holds in store



## Lessons Learned

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- Newest Release had Pros and Cons



# Lessons Learned

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- Newest Release had Pros and Cons
  - New Utilities
    - Outline Load Utility
    - Migration of Business Rules to 11.x
    - Migration of Reports to 11.x



## Lessons Learned

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- Newest Release had Pros and Cons
  - New Utilities
  - LCM
    - Ability to quickly migrate an entire application to another environment
    - Encountered an issue exporting Business Rules
      - Possibly related to migration



# Lessons Learned

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- Newest Release had Pros and Cons
  - New Utilities
  - LCM
  - SmartView
    - Install process is much easier
    - Encountered bugs using this during training



# Lessons Learned

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- Newest Release had Pros and Cons
  - New Utilities
  - LCM
  - SmartView
  - Business Rules
    - Improved security
    - Bugs related to “All Locations” / LCM export
    - Sequences of Sequences were sensitive to changes



## Lessons Learned

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- Newest Release had Pros and Cons
  - New Utilities
  - LCM
  - SmartView
  - Business Rules
  - Workspace
    - Integration with Planning is even better
    - Dlg / Timeout bug in Workspace fixed in 11.1.1.3 patch



## Lessons Learned

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- Newest Release had Pros and Cons
  - New Utilities
  - LCM
  - SmartView
  - Business Rules
  - Workspace
  
- Dedicated IS / Finance Liaison
  - Saved consulting time by performing more tedious tasks quicker
  - Involved in entire project end to end, especially testing
  - Eased future communication between IS and Finance
  - Good preparation for future in house training / helpdesk support



## Lessons Learned

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- Newest Release had Pros and Cons
  - New Utilities
  - LCM
  - SmartView
  - Business Rules
  - Workspace
- Dedicated IS / Finance Liaison
- Security
  - Setup testuser in each group
  - Testing security can be time consuming



## Migrating to Planning 11

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- Introductions
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- Installation Process
- Migration Process
- Lessons Learned
- **What the Future Holds in store**



## Future

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- Convert Graphical Business Rules to Advanced Calc Scripts
  - Optimization is promising



## Future

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- Convert Graphical Business Rules to Advanced Calc Scripts
- Train Finance staff on adhoc analysis in Excel



## Future

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- Convert Graphical Business Rules to Advanced Calc Scripts
- Train Finance staff on adhoc analysis in Excel
- Web Analysis Reporting



## Future

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- Convert Graphical Business Rules to Advanced Calc Scripts
- Train Finance staff on adhoc analysis in Excel
- Web Analysis Reporting
- Automated Rolling 12 month Forecast



## Future

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- Convert Graphical Business Rules to Advanced Calc Scripts
- Train Finance staff on adhoc analysis in Excel
- Web Analysis Reporting
- Automated Rolling 12 month Forecast
- Physical Essbase Server?



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# QUESTIONS

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