Hyperion Focus 17

Rehosting from on-premise to Azure

Karin Aunger

AMOSCA – with Specsavers

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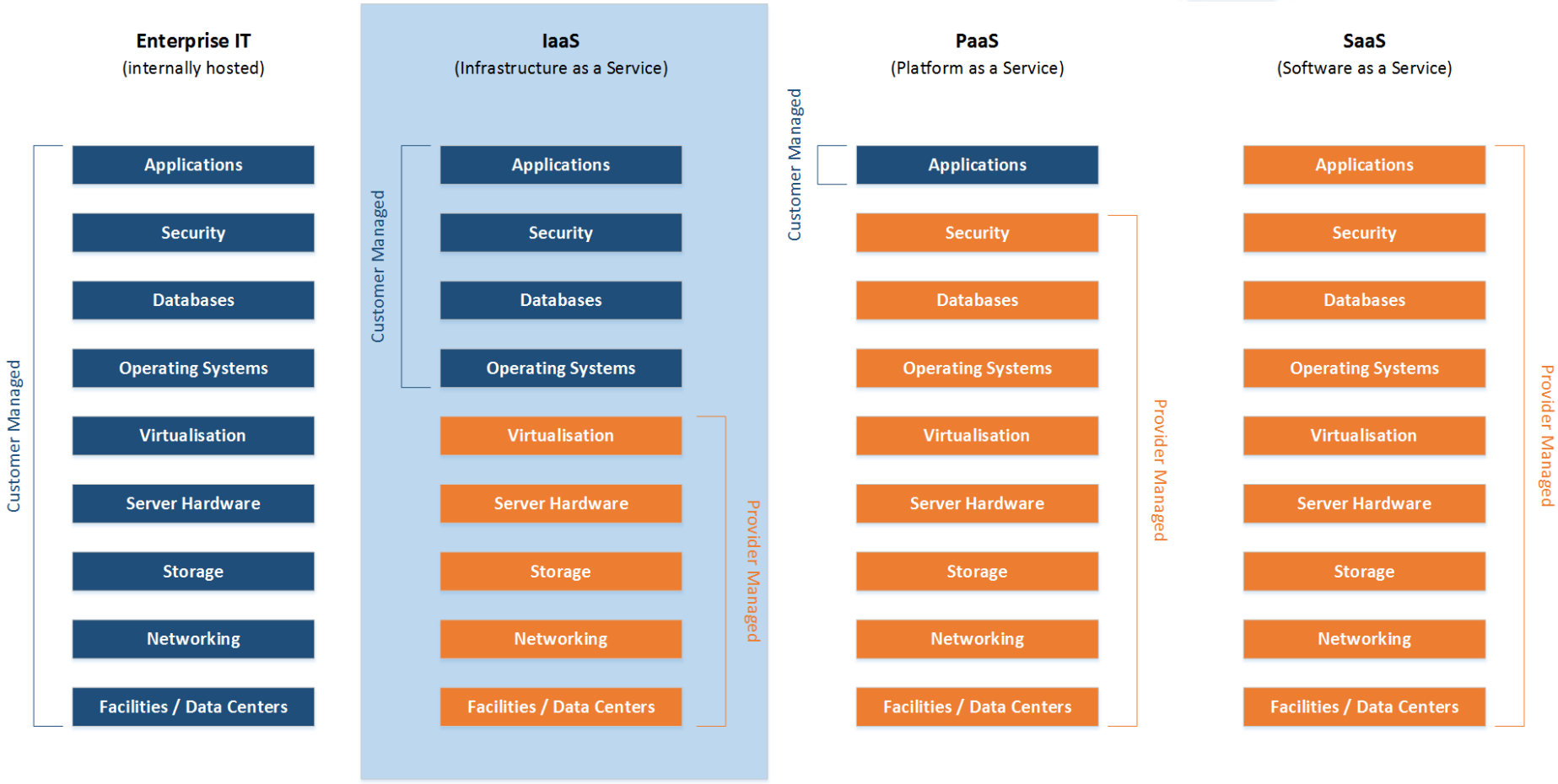
Summary

Summary of this project

- Specsavers upgrade
- From on-premise HFM/FDM 11.1.2.1
- to Azure EPM 11.1.2.4.X
- Timescale From March – early July 2017

Hosting options

Azure fits into IaaS



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Specsavers

Objectives and drivers in this project

- Upgrade Hyperion EPM on to new hardware
- Mitigate on-premise risk to MS Azure cloud service
- Hyperion old version no longer on Oracle prime support
- HFM applications to be upgraded, gain extra functionalities and keep up to date with bug fixes
- Supportability

Objectives and drivers

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- Conversion of FDM to FDMEE
- Existing FDM conversions/mappings to be rebuilt in new FDM Enterprise Edition to move fully into Java/web
- Upgrade Smartview and MerlinXL as reporting tools
- Servers no longer in-house, on-premise, but maintained by reliable cloud provider
- Hardware/support, maintenance of the systems, done by Azure

Technical drivers behind this migration

- Move the hardware support & maintenance from on-premise to Azure
- From win.2008 to win.2012, older Oracle DB to Oracle 12g
- Enhanced security: Add encryption (client-server) and high availability (HA), more secure file system storage
- High availability covers also the Oracle Database system

Technical drivers behind this migration

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- Add more environments, Staging, DEV, TEST, PREprod and PROD. Did not have sufficient environments before.
- Physical security of facilities is Azure's responsibility
- Less network expertise required by client on-premise IT
- Integrate main Oracle EBusiness implementation in Azure with EPM via FDMEE. Part of a wider project

Issues faced:

- Avoid over-complicated access to Azure servers
- Need to get all technical prerequisites fulfilled before the start of the project, e.g.
  - » Correct install/service users in AD domain
  - » DBs and DB users set up in time
  - » Servers positioned in target domain with correct DNS suffix
  - » AD domain required in Azure, due to HA and file shares
- Consider communication and lead times needed between local IT and firewall and Azure admin staff.

Issues faced

... continued

- Specialist internal resources required, keep consistent admins, ensure availability of key people
- Azure related resources under pressure with many other cloud projects, e.g. eBusiness also adding additional workload and complexity
- Ensure availability of named domain administrators and DB admins
- Lack of AD in Azure led to lack of DNS server in Azure, having to use hosts files for name resolution

Issues faced

.. continued

- It's easy to underestimate resource requirements when many changes are taking place at the same time
- EPM installation/config can suffer hold-ups if resources/change requests require long lead times (e.g. firewall ports)
- When 3rd parties and SLAs involved, changes required need to be communicated well in advance

Issues faced

Complicated remote access

- Avoid multiple hops, multiple logins
- Ensure communication tools tested before start of project, to be used during remote access too
- Ensure methods of copying files up to servers
- Testing plan needs to ensure that testing users can access the resources (e.g. Citrix, clients)
- Decide whether to use proprietary backup solution (for DR) or to implement separate tool

Lessons learnt

- Need dedicated resource staff to assist during migration
- Ensure all aspects of the end to end architecture are designed and understood before starting, especially if new to Cloud hosted options
- Need named contact persons for different layers of access between servers and resources (i.e. between on-premise and cloud)

Lessons learnt

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… continued

- Without final AD in place presents different problems at different levels (e.g. server names)
- Changing the ‘install user’ and/or ‘service user’ for EPM will cause extra work
- Plan well in advance to have file shares created so that access works across environments for migrating data across (LCM, DB export, HFMcopyapp,…)

Lessons learnt

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... continued

- Plan well in advance how the clients will access the servers, eg alias names or SSL offloading, which ports allowed in firewall
- Agree a technical design spec for all envs to be built right from start of project. List all prerequisites, also the required fully qualified server names, which must not change
- Collaborate on sharing infrastructure information (example diagrams) with all involved

Challenges

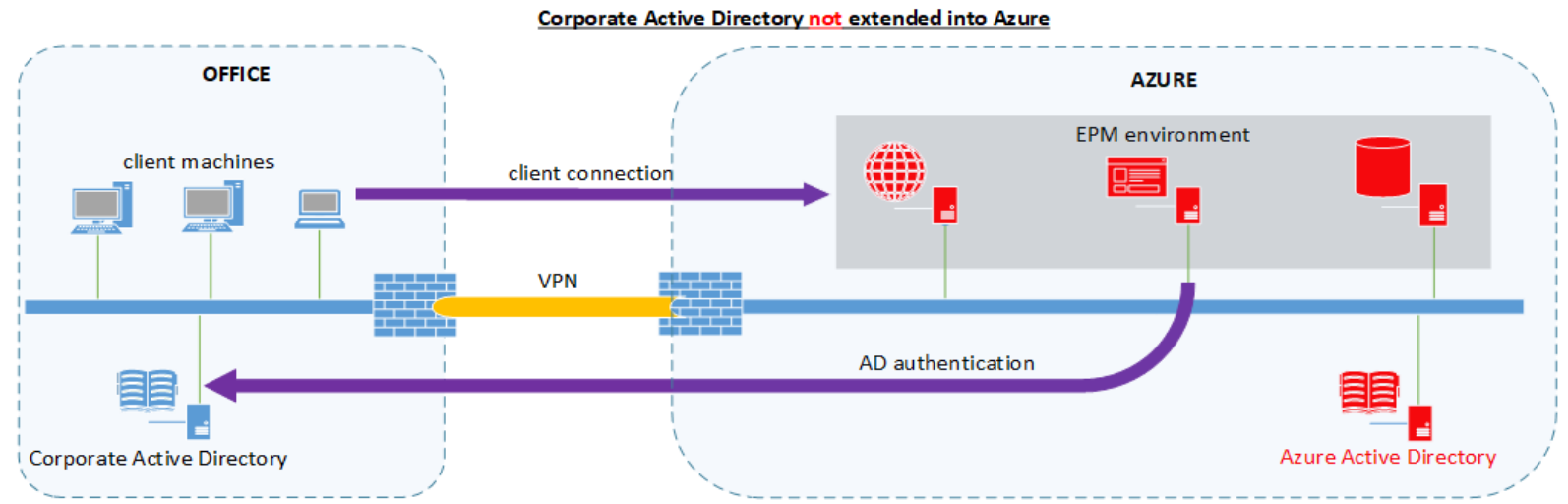
- To deliver all prereqs within good time before a build starts
- Having to find workarounds to avoid project delays, e.g. using alias server names in hosts files for the installation of EPM, and using a local install user.
- Also implementing Ebusiness on Azure, so part of the challenge to the organisation in terms of lots of change and demand on IT resources

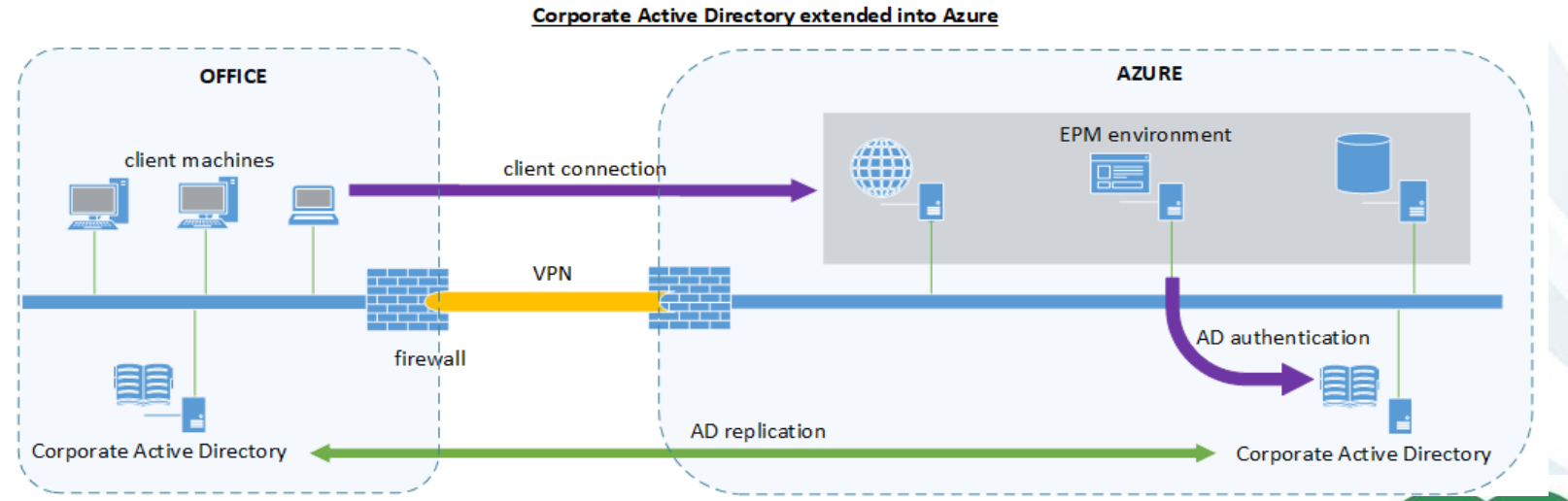
Challenges

... continued

- Finding an alternative solution to a temporary AD
- Availability of this new AD domain was unknown at the start of the project.
- To deliver all environments in the timeframe - Staging build was late March 2017, and PROD system completed early July 2017. Go-live was mid July – given the setbacks encountered
- Flexibility in adjusting build dates

Active Directory and Azure





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Specsavers

What went well

- Upgrade of HFM applications across big version jump went smoothly
- No issues with HFM upgrade as such, although supported Oracle method of maintenance release upgrade did present problems
- HFM upgrade was carried out with Staging system, copying the apps across and upgrading
- Keeping existing domain users for now worked well for Pre/Prod

What went well

... continued

- FDMEE built swiftly with help of AMOSCA consultants, coaching client
- No significant adjustments needed to user security, Shared services data partly migrated
- Coping with delays and challenges to make it work
- Working onsite a lot to ease communication and more effective access to servers.

What went well

... continued

- Testing each system quickly with client and using EPMMaestro for quick data loads and consolidations
- Getting snapshots and DB backups done quickly at key points
- Getting help from MerlinXL product experts with the migration and load balancing config
- All existing MerlinXL and Smartview reports OK to use in new version

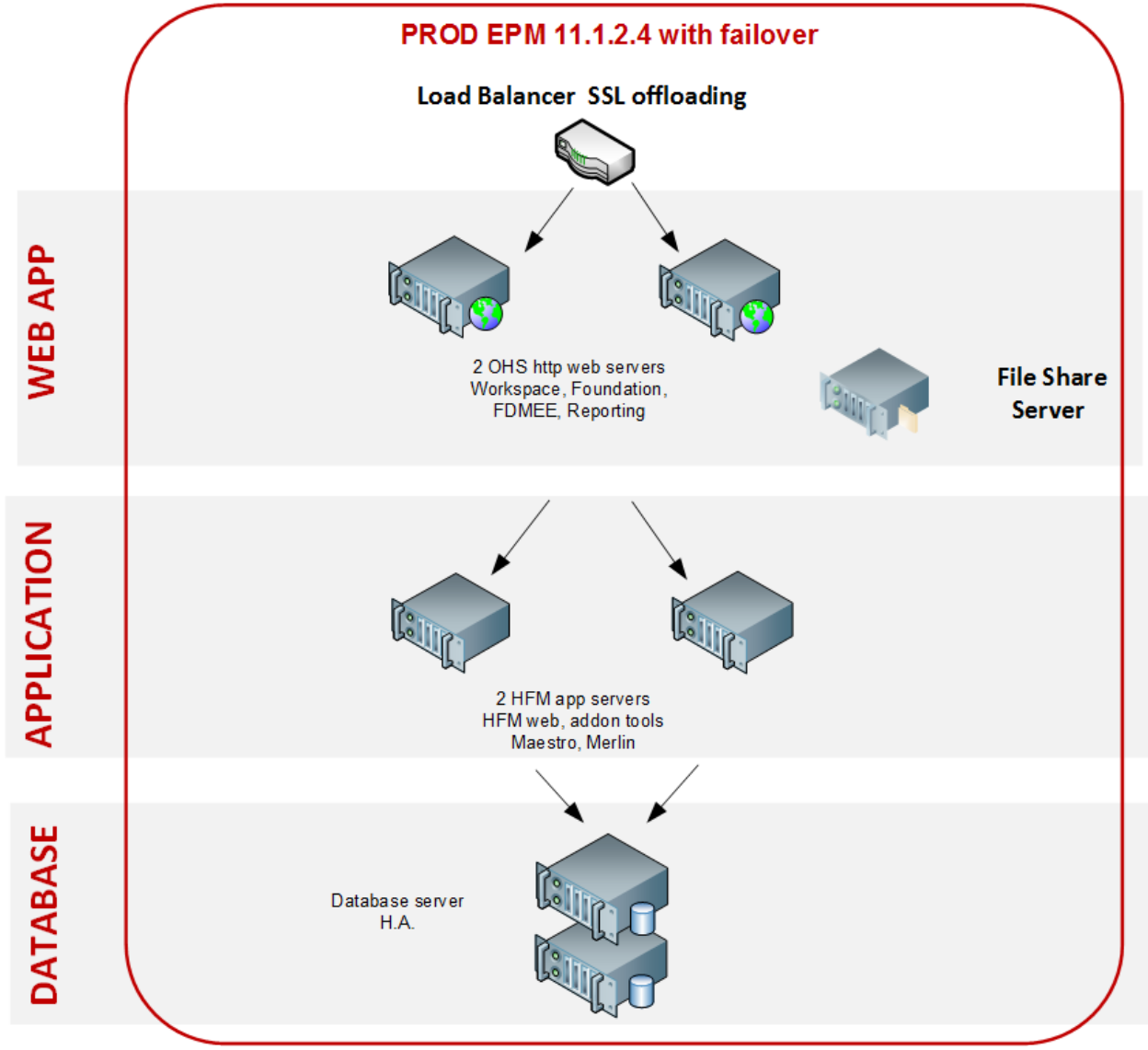
What went well

... continued

- Maestro routines mostly quickly rebuilt, using the new server names etc.
- WebSymphony admin doc links easily recreated using menu
- 4 environments built one after the other
- Load balancer with SSL provided by client, no SSL config needed for EPM

Production system

PreProd same layout



Benefits of new EPM version

General benefits of upgrading EPM

- New versions of HFM and FDMEE with improved usability, less windows client usage, IE11 & win10 support, latest Office version
- Being on a fully supported current version and newer O/S
- Smartview version better, rolled out on Citrix
- Easier migration between environments, using LCM

Benefits of new EPM version

... continued

- Integration with source ERP system (eBusiness) via FDMEE
- Ongoing benefits will be easier maintenance of the servers due to being in a managed cloud.

Benefits of moving to Azure

- Hardware maintained by the provider
- Service availability improved
- Hardware cost removed
- Internal skill set requirement removed with respect to hardware
- Facilities cost (data centre etc) removed
- Resilience / service availability options provided by Microsoft, with SLAs
- Hardware monitoring requirements reduced

Discussion

- Any questions

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Thank you