

# Hyperion Focus SA

'EPM in 2020'



## EPM 11.2 - a migration overview

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# EPM 11.2 – a migration overview

Things to consider when preparing for the next major Oracle EPM on-premise release

## Agenda

- Benefits
- Requirements & Considerations
- Migration Path
- Functional Changes
- Gotchas
- The Future & Considerations
- EPM 11.2 sample migration plan





# Benefits

What are the benefits to migrating to the new EPM 11.2?

- Support for latest Windows Server 2019
- Support for SQL Server 2016 – 2017
  - » 2019 support later this year
- EPM Premier Support to at least 2030
- Much newer & supported Java version
- Support for latest TLS (1.2) certificate cryptography
- No need for FR Studio client as web only



# Requirements & Considerations

What requirements and considerations are there for the upgrade?

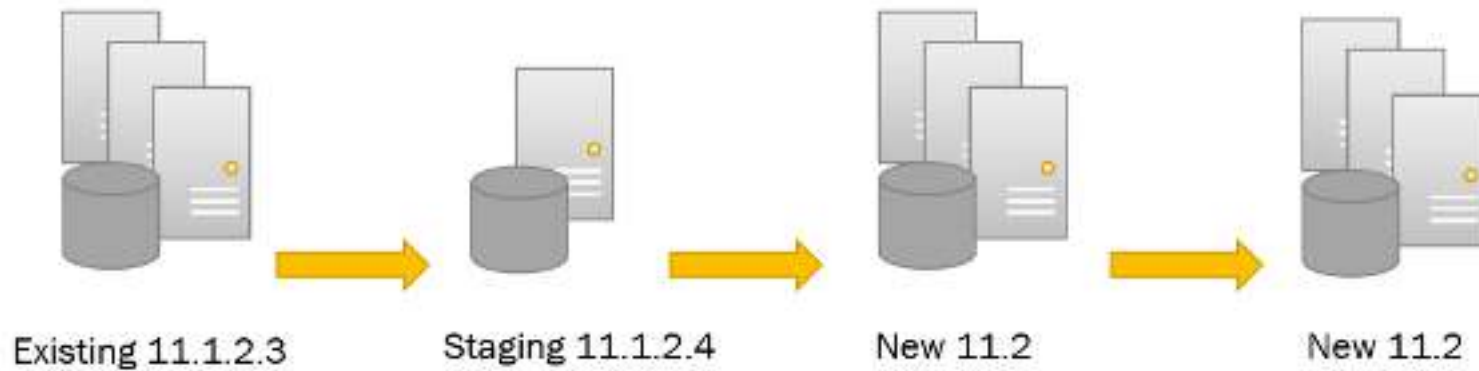
- You need to be on EPM 11.1.2.4 already
  - » This enable schema upgrade procedure
  - » If not on 11.1.2.4 you will need a Staging environment
  - » Or consider a reshell
- The upgrade is out-of-place, i.e. on new servers
- The process can take longer due to local complexity
- System requirements are higher than before
- On EPMA? Consider Classic or DRM 'lite'
- Whilst applications are still 11.1.2.4, Essbase still requires current Java, etc.



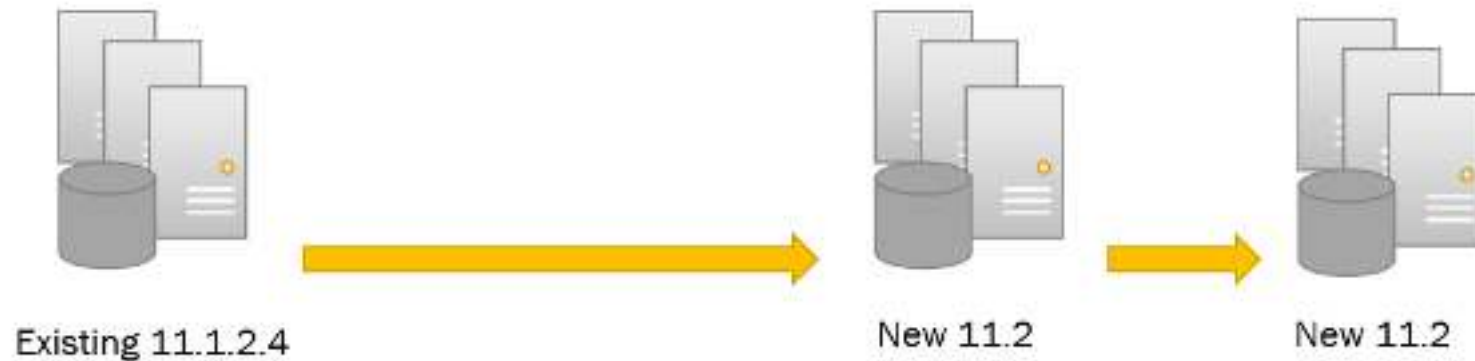
# Migration Path

How do I get to EPM 11.2?

## Migration from EPM 11.1.2.3 to 11.2



## Migration from EPM 11.1.2.4 to 11.2





# EPM 11.2 - Functional changes

How is EPM 11.2 different from 11.1.2.4?

- As this is a technical upgrade, there are no core functional changes, except:
  - » FR Studio Client is gone – web only
  - » EPMA is gone – replaced with return to Classic or DRM ‘lite’
  - » Essbase Analytics Link (EAL)
    - Supported to end of 11.1.2.4 support
    - High risk 11.2 compatability
  - » HFM CopyApplication, still works, however may not be supported
- Discontinued (more info in Oracle Roadmap session)
  - » Interactive & Production Reporting (IR & SQR) and Web Analysis
  - » Financial Management Analytics (OFMA)
  - » Quantitative Management and Reporting for Solvency (QMR)
  - » Strategic Finance and Crystal Ball
  - » Planning – Workforce, Cap Ex, Project Financial, Offline Planning modules and Simplified User Interface
  - » Disclosure Management and EPM Mobile



# EPM11.2 Functional Overview

EPM 11.2 Functional overview

- EPM 11.2 - functionality is the same as 11.1.2.4 for HFM & Planning
  - » Financial Reports (web studio only)
  - » FDMEE no changes
- EPMA is not available with 11.2
  - » HFM 11.2 is Classic or...
  - » DRM can be used to manage HFM metadata in 11.2  
*(note that other tools are available e.g. the 11.1.2.3 HFM Client)*
    - Free restricted use license for DRM is included
    - More detail in the 'EPM 11.2 What's new, what's gone' session



# EPMA to 11.2 DRM

## Overview of the Process

1. Export 11.1.2.4 application metadata
  - » Use the EPMA File Generator Utility
2. Modify the exported metadata (*.ads file*)
  - » Use the ADS file conversion utility
3. Create an application in DRM using the supplied HFM template
  - » *Note the supplied HFM template requires modification to work with your application*
4. Import the converted .ads file to DRM
5. Use DRM to make changes to application metadata which can be exported and loaded to HFM Classic



# EPM 11.2 Migration Gotchas

What is out there that may trip me up?

- The implementation is more complex than before
  - » It's the Oracle Fusion platform – however future updates are simplified
- The documented process is 'Work in Progress'!
  - » Patches are due out and in future will address this
- A defect appears to prevent highly available configurations (n+1 setups)
- FDMEE setup and the application migrations require additional DB services – more complex than previous versions
- As Essbase is currently still 11.1.2.4 (Java 6), it is not possible to have a full SSL configuration
- Support for some OS, SQL DB and browser versions not yet available
- EPM product patching schedule is vague at present
- Current understanding of underpinning infrastructure upgrades and impact on EPM 11.2 is minimal



# The Future & Considerations

What might be coming for EPM 11.2 in 2020?

- Future
  - » Support for other Operating Systems versions
  - » Support for other SQL Server versions
  - » Support for Chrome & Edge browsers
  - » Oracle product patches (functional enhancements and defect fixes)
- Considerations
  - » Application redesign if new requirements
  - » Re-platform to benefit from hosting options

In summary, the upgrade to EPM 11.2 works and is stable.



# EPM 11.2 Sample migration plan

Make a test plan as part of the upgrade project to make sure all is working as expected

- Infrastructure
  - » Design plan
  - » Hardware build (physical or virtual)
  - » EPM install & configuration
  - » Application migration
- Functional
  - » User Acceptance Testing (by application)
    - Security
    - Navigation
    - Data
    - Automation / Scripts or any other bespoke elements
- Repeat for each additional environment

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Thank you

Any queries, please direct through:  
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