Hyperion Focus 17

Data management in Oracle EPM Cloud

Serge Kpossou, Gavin Hogge (AMOSCA)

keyteach. TPH Merlin XI epm FastTrack ORACLE Accelatis Powering I.T. Empowering Business. a datAvail company AMOSCA Claremont. APPLIEDOLAP cubus EPM Maestro UKOUG UK ORACLE USER GROUP

Agenda

- Hybrid IT (Mixed Cloud and on-premise environments) – Why does it matter ?
- Oracle cloud integration options
  - » Evaluating available options to transfer & manage metadata & data in Hybrid environments
- Hybrid Cloud integration Scenarios
  - » PBCS/FCCS ⇔ On Premise ERP, EPM Systems
  - » PBCS/FCCS ⇔PBCS/FCCS
  - » OAC ⇔ On Premise ERP, EPM/Essbase Systems
- Recommendations & Conclusion

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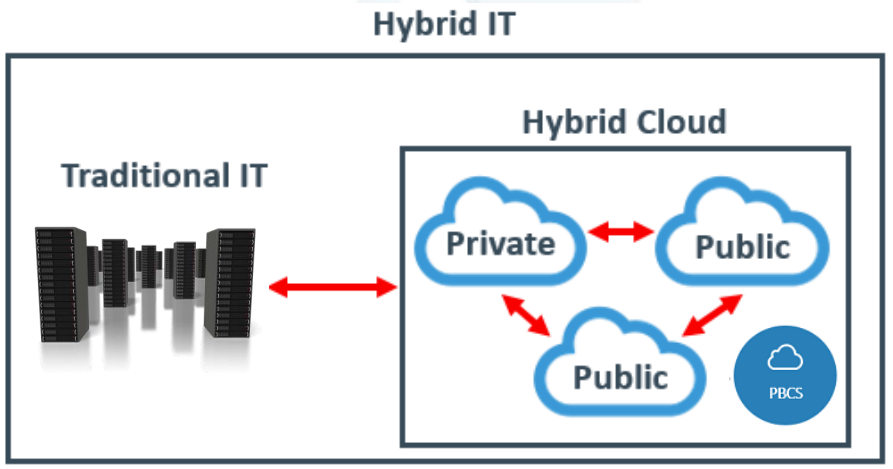
Managing data in Hybrid environments

The Key Success factor of a Hybrid environment is efficient data & metadata integration

- "Hybrid IT" enables development, execution and governance of integration flows connecting any combination of on premises and cloud based processes, services, applications, and data within individual or across multiple applications

  -Gartner

- Hybrid IT, is the strategy, planning & implementation that enables existing non-cloud infrastructure to run alongside cloud infrastructure, and migrate as necessary



Why does it Matter ?

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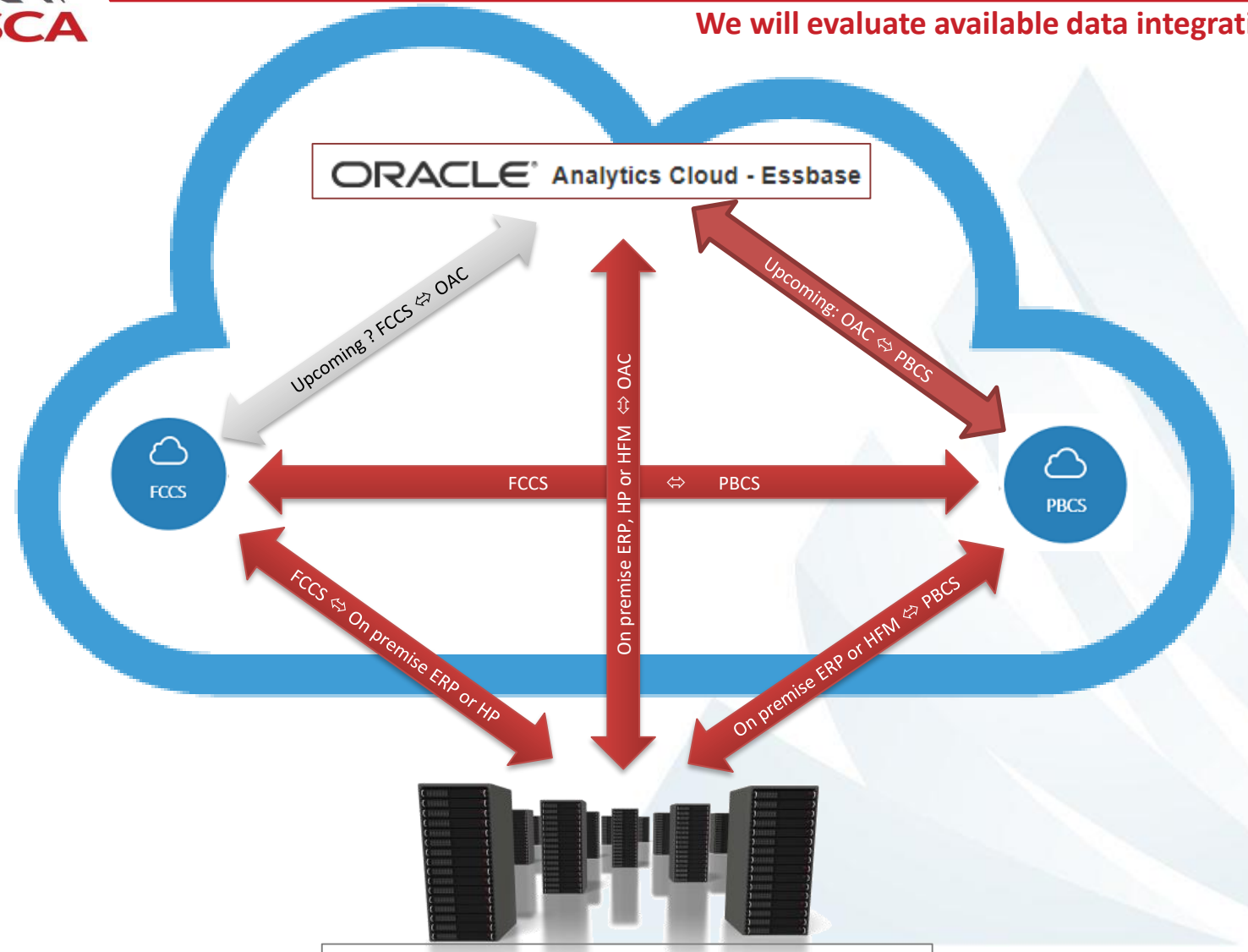
Hybrid integration

We will evaluate available data integration options

- (E)PBCS
- FCCS
- TRCS
- PCMCS



On premise– Accounting Systems, Business applications, Hyperion Financial Management, Planning, etc…

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INTEGRATION OPTIONS

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Integration Options

Options and tools available to import/export metadata and data

- PBCS / FCCS
  - SmartView
  - Native Import / Export jobs
  - Snapshots (LCM in the cloud)
  - Data Management (FDMEE in the cloud)
  - EPM Automate (for Scheduling)
  - Application Programming Interfaces (API)
- OAC (Oracle Analytics Cloud)
  - Cube Designer using Templates or Free form
  - Export utility
  - LCM utility
  - Dimension build rules / Data load rules (DBR/DLR)
  - Essbase Command Line – ESSCLI (for Scheduling)
  - Application Programming Interfaces (API)
- EPM On-Premise – Not covered
  - Lifecycle management (LCM)
  - Financial Data management Enterprise Edition (FDMEE)
  - Data Relationship Management (DRM)
  - OutlineLoad utility (for Hyperion Planning)
  - Dimension build rules / Data load rules (DBR/DLR) (for Essbase)
  - EPM Maestro (for Hyperion Financial Management)

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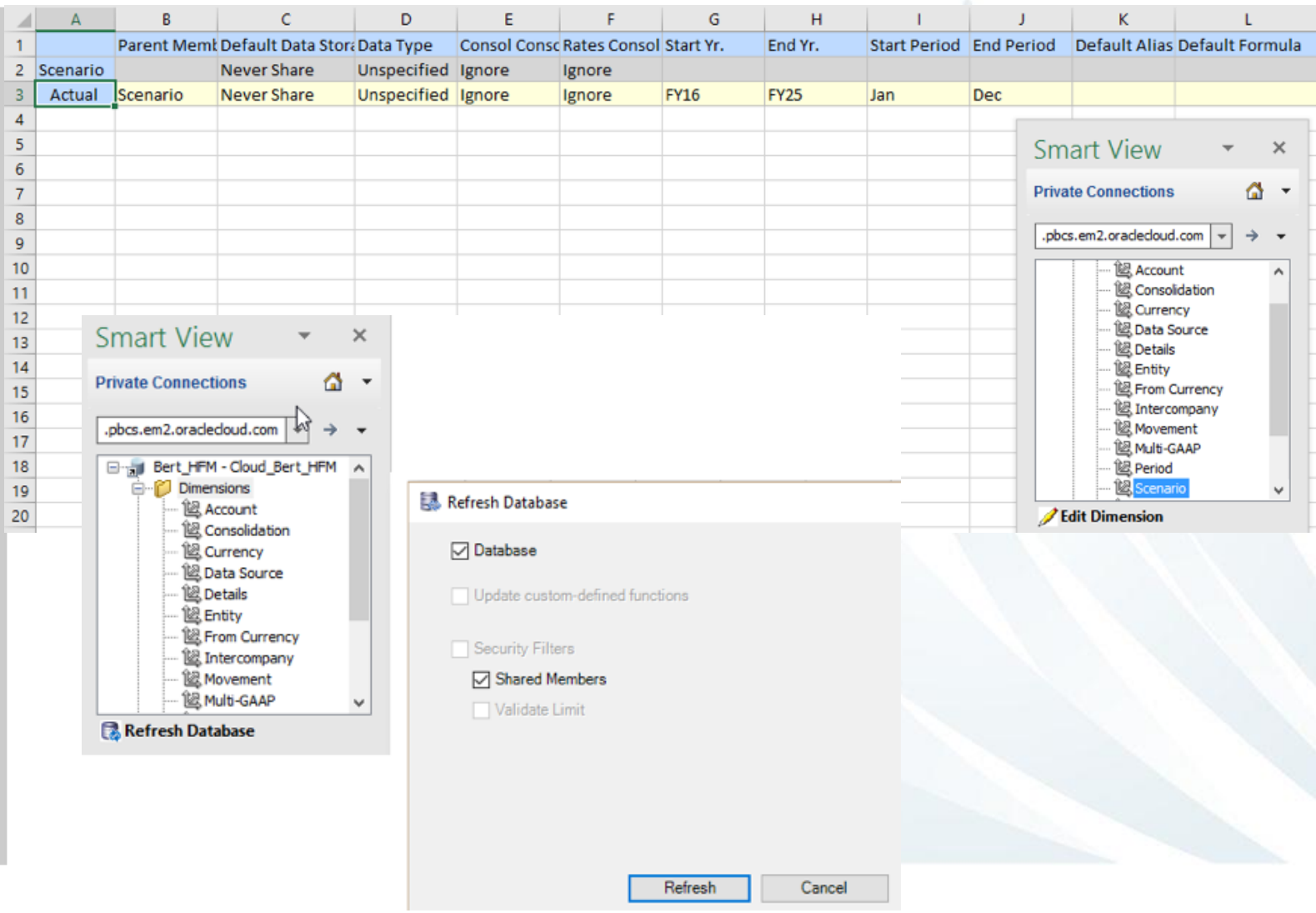
PBCS/FCCS: Smart View

- Metadata
- Planning admin Extension
- Dimension Editor allows importing metadata
- Data
- Normal SmartView data submission and retrieve



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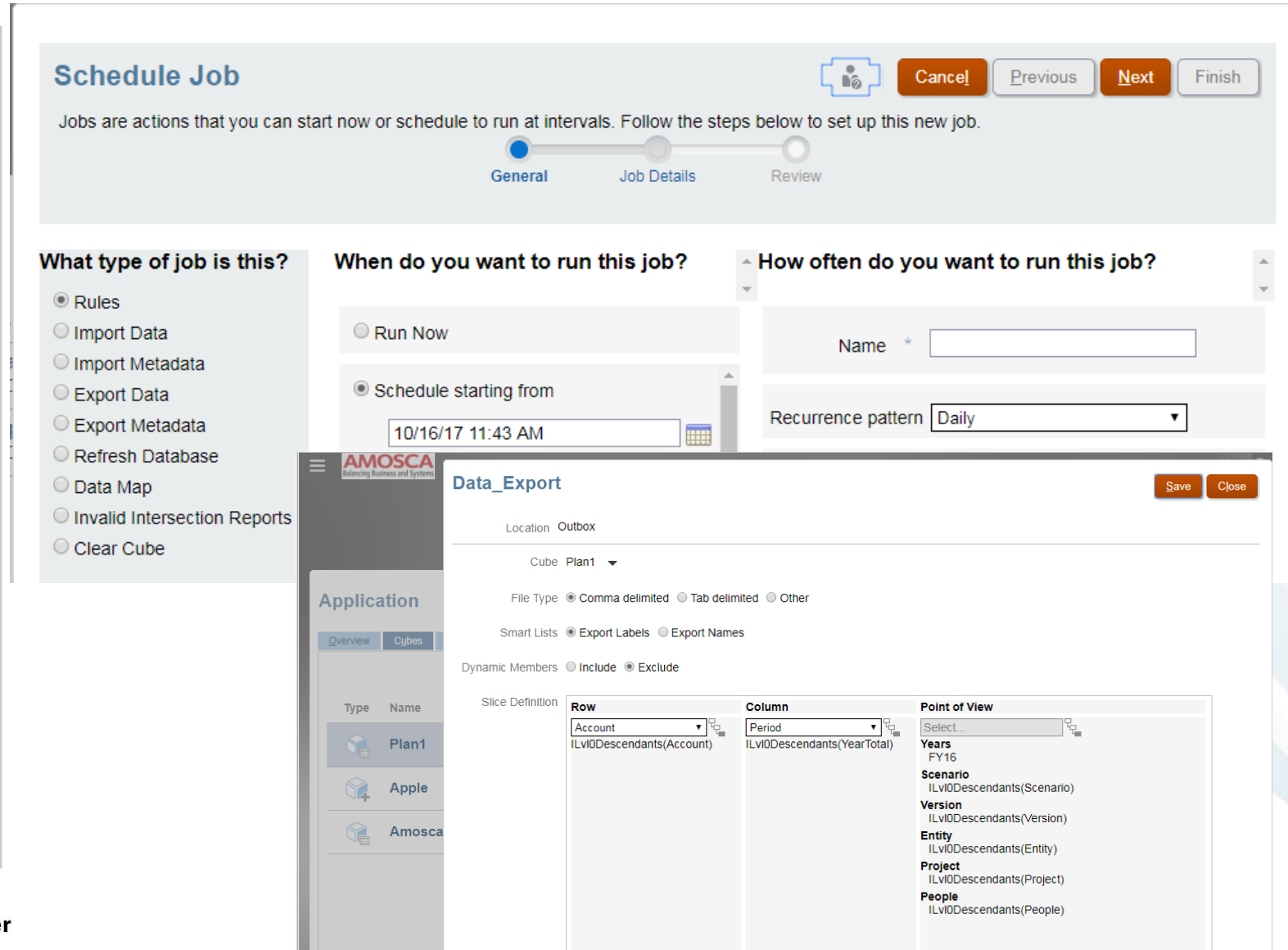
PBCS/FCCS: Import / Export Jobs

- Metadata
- Metadata Export & Import Jobs
- Data
- Data Export & Import Jobs



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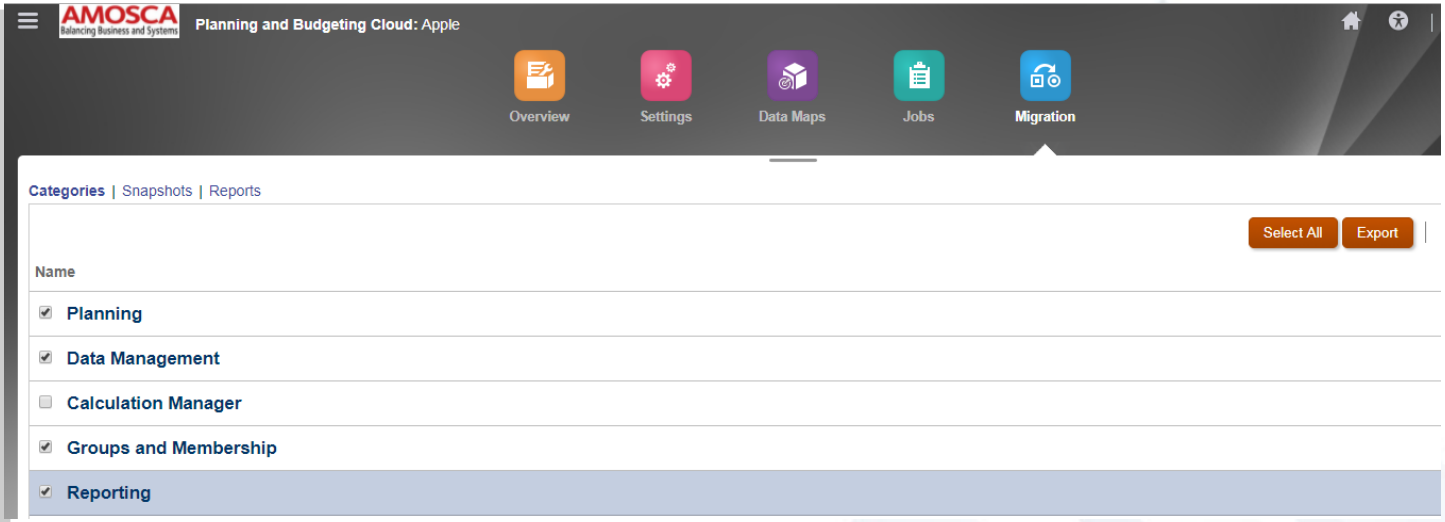
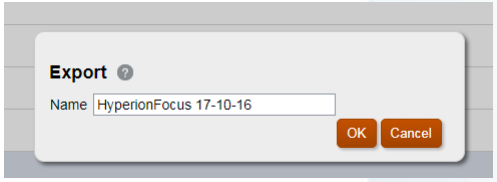
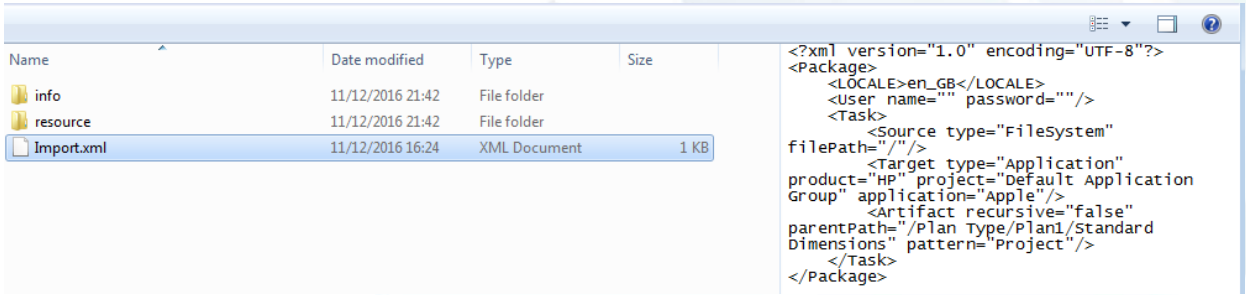
PBCS/FCCS: Snapshots (LCM)

- Metadata
- Metadata Export & Import (LCM)
- Data
- Data Export & Import (LCM)

Migration between EPM Applications







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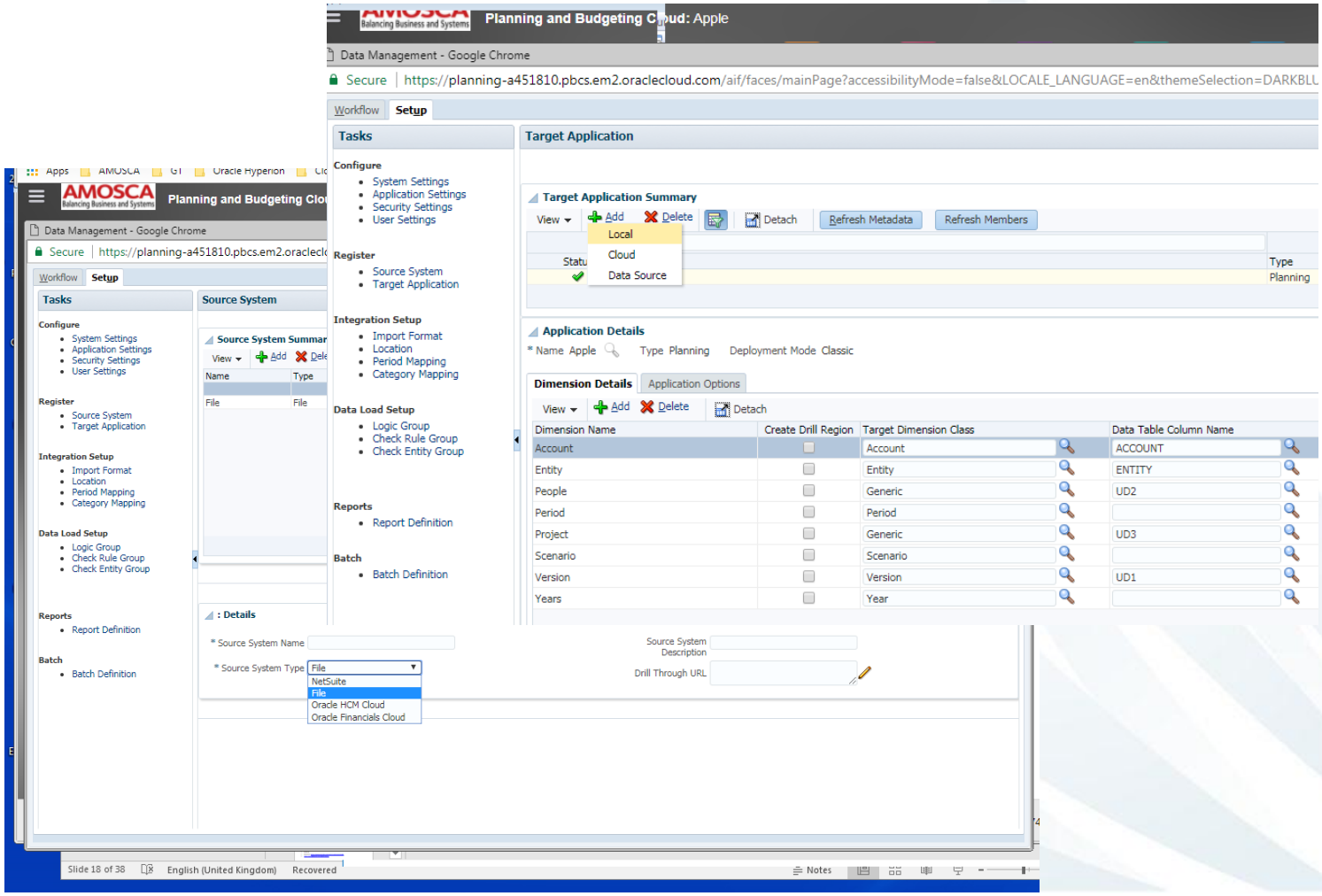
PBCS/FCCS: Data Management

- Data
- Import, Export, Transform Data



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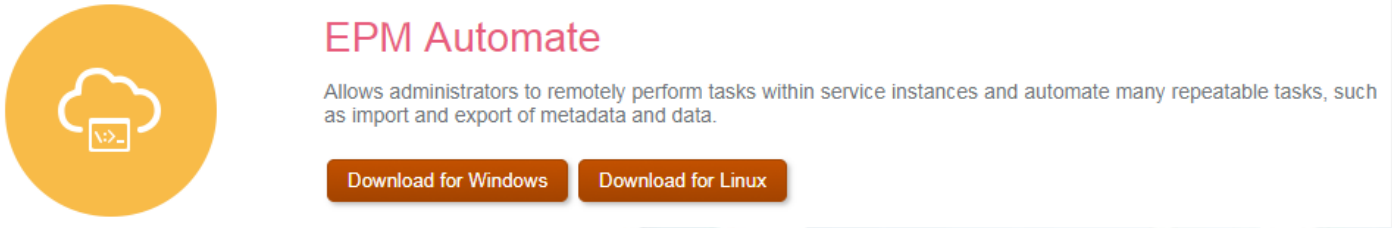
PBCS/FCCS: EPM Automate

- Windows & Linux command line utility
- Enables uploading, downloading of files to and from the cloud
- Enables automation of integration routines



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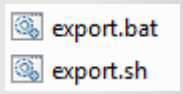
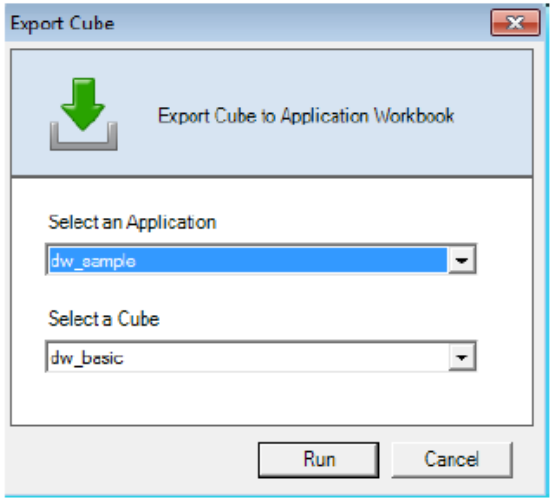
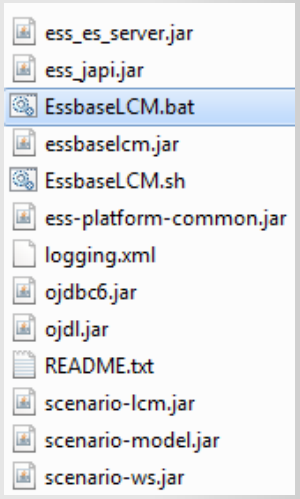
OAC: Cube Export Utility (dbx tool)



- Enables Exporting metadata and data to an Excel Workbook using command line
- During the export process, a structured file representing metadata, named Appname_Cubename.xml, is created in the specified export directory.
- This .xml file is then used to create an application workbook, named *Appname_Cubename_timestamp*.xlsx.
- The application workbook can be used to redeploy the same cube to the cloud service.



OAC: LCM Utility



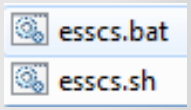
A command line based tool used to migrate Essbase artefacts from one Essbase deployment to another within and across releases.

Typical use case:

- Export from On-Premise Essbase (PS4) as a zip file and import in to Essbase cloud(12c)
- The tool can also be used to export and import in to the same releases/Essbase.

The Essbase content exported through LCM utility is a zip file. Supported releases for this tool are 11.1.2.4.0xx, 11.1.2.4.5xx , 12c EssCs.

OAC: Essbase Command Line (ESSCLI)



- Windows & Linux command line utility
- Enables uploading, downloading of files to and from the cloud
- Enable automating integration routines
- Example of commands:
  - Calc
  - Dataload
  - Dimbuild
  - Upload
  - Download
  - Lcmimport
  - lcmexport

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OAC: Cube Designer

- Excel Extension for Essbase Adminitration
- Enables exporting & importing Essbase artefacts

	A	B	C	D	E
1	Application Name	HyperionFocus			
2	Database Name	Visit-London3			
3	Version	1.0			
4					
5	**Dimension Definitions**				
6					
7		Dimension Type	Storage		
8	Measures	Accounts	Dense		
9	year_Dim	Time	Dense		
10	quarter_Dim	Regular	Sparse		
11	market_Dim	Regular	Sparse		

	A	B	C	D	E	F	G
1	**Properties**						
2							
3	Application Type	BSO		Aggregate missing values	No		
4	Outline Type	Duplicate		Create blocks on equations	No		
5	Date Format	yyyy-mm-dd		Two-Pass calculation	Yes		
6	Scenario Sandboxes	0					
7							
8	**Alias Tables (Alternate Member Names)**						
9							
10	Default						
11							

	A	B	C	D	E	F	G
1	Dimension Name	Measures					
2							
3	**Definitions**						
4	File Name	Dim_Measures					
5	Rule Name	Measures					
6	Build Method	PARENT-CHILD					
7	Incremental Mode	Merge					
8							
9	**Members**						
10	Columns	PARENT	PARENTID	CHILD	MEMBERID	STORAGE	CONSOLIDATION
11				Measures	Measures	X	
12		Measures	Measures	visits	Measures.visits		~
13		Measures	Measures	spend	Measures.spend		~
14		Measures	Measures	nights	Measures.nights		~
15							
16							

None
Prefix
_Underscore
Tops of Ranges
Month First (mm-dd-yyyy)
True

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INTEGRATION SCENARIOS

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PBCS / FCCS ⇔ On-premise ERP, EPM

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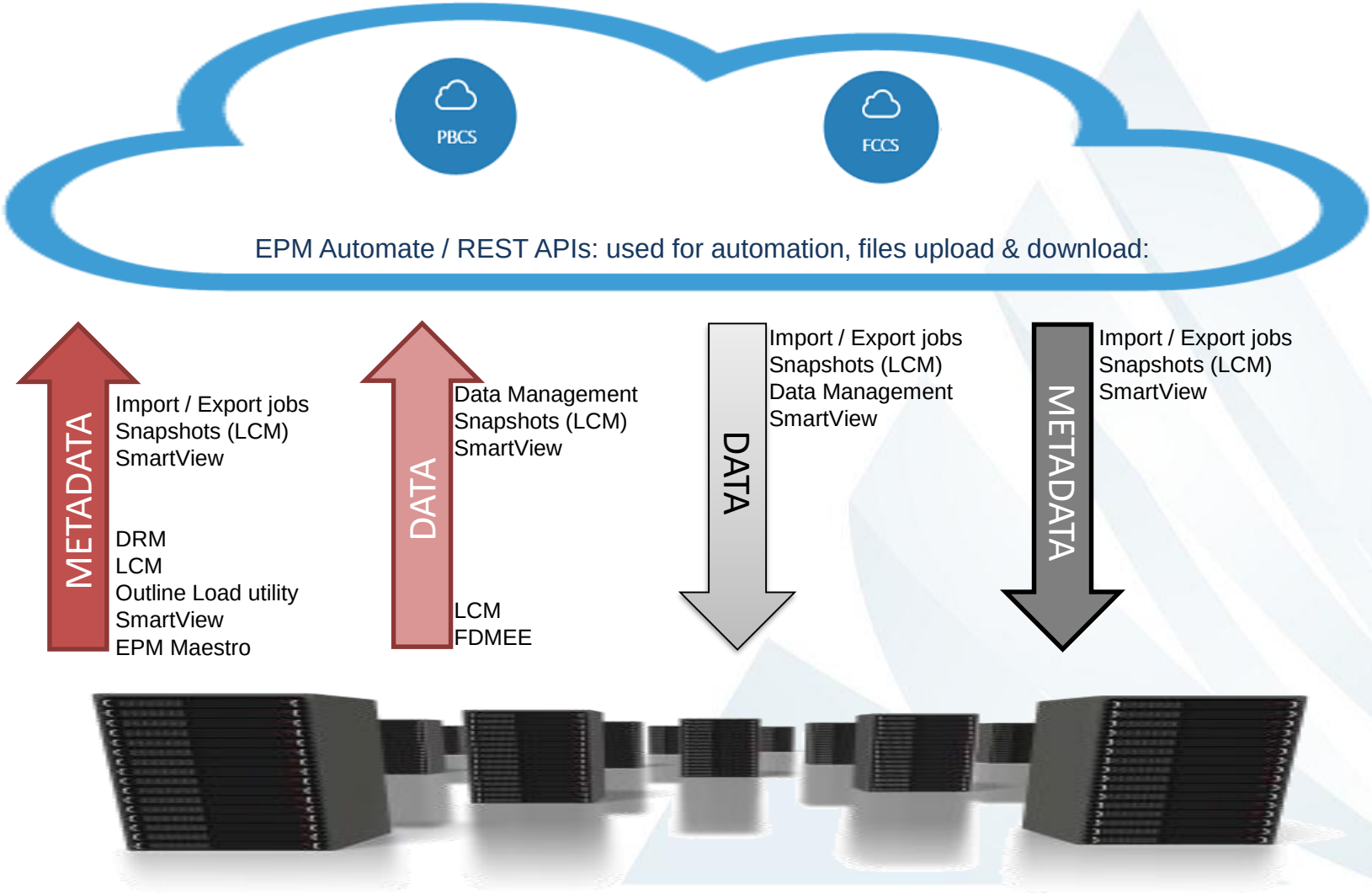
Transferring PBCS/FCCS Data and Metadata to and from the cloud



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PBCS/FCCS ⇔ PBCS/FCCS

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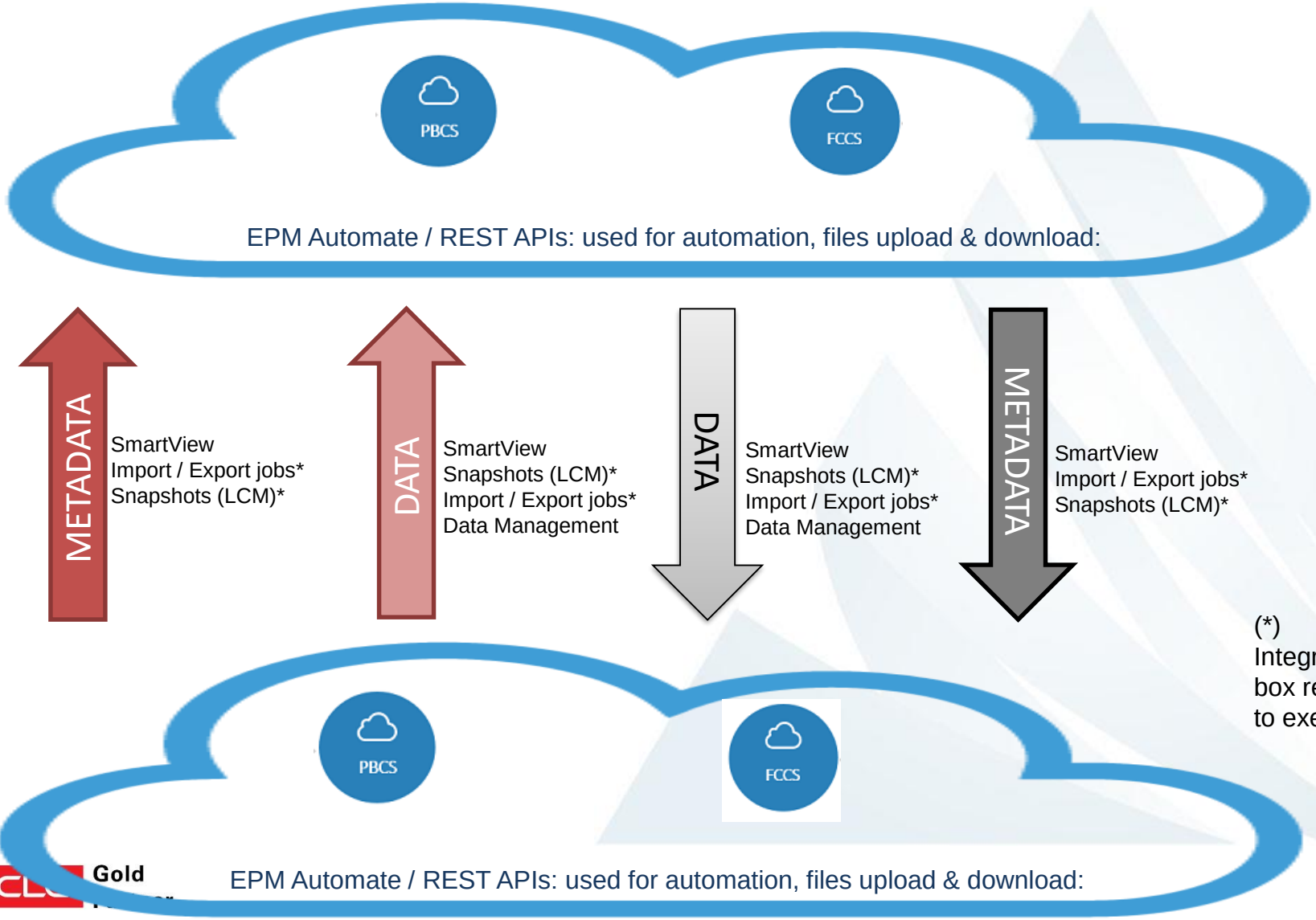
Transferring PBCS Data and Metadata to and from other PBCS applications



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OAC ⇔ On-premise ERP, EPM/Essbase

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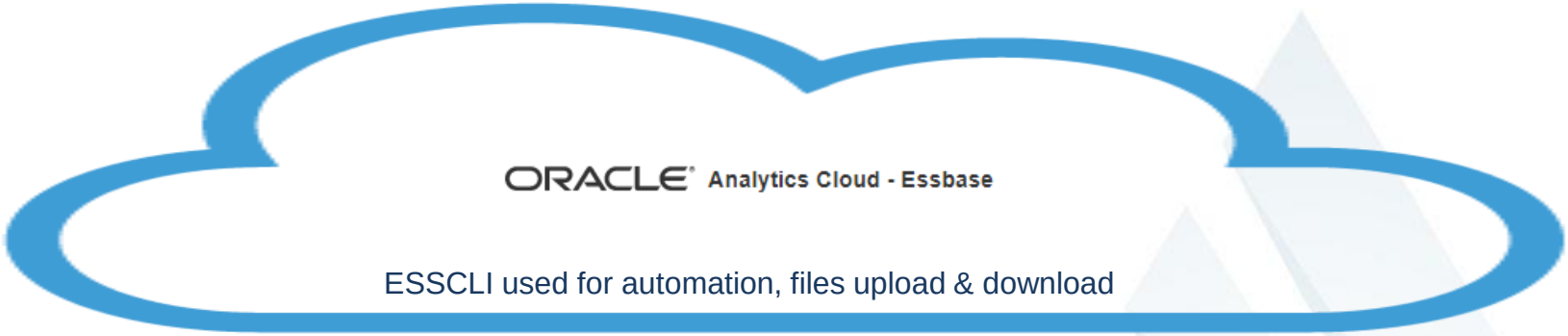
Transferring PBCS/FCCS Data and Metadata to and from the cloud



METADATA
LCM Utility
Export Utility
Cube Designer
DRM
DBR

DATA
LCM
FDMEE
Cube Designer
DLR
Report Scripts
Data Export

DATA
LCM
Cube Designer
DLR
Report Scripts
Data Export

METADATA
LCM Utility
Export Utility
Cube Designer
DBR

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Recommendations & Conclusion

- Metadata and data flows: Ensure that you identify Hybrid integration points early in your design phase

- There are many integration options available, we can highlight the pros and cons for each of them and assist you to chose the best tools for your job.

- We excluded “Integration CS” & “ODI CS” because as of October 2017, these CS modules do not offer FCCS/PBCS/OAC plugins or knowledge modules. This is likely to change in the future. Watch this space.

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Thank you. Questions ?

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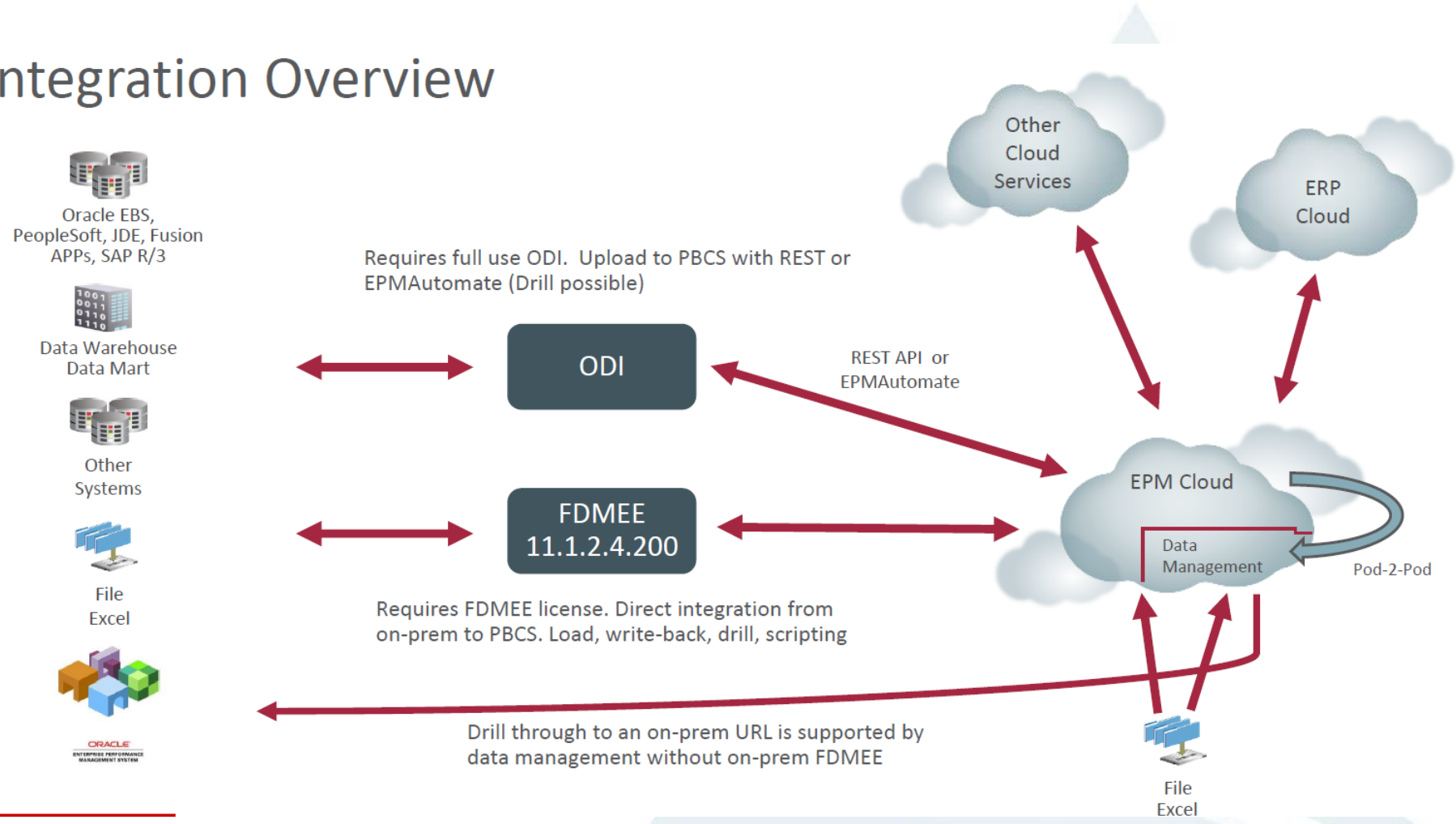
Not part of the presentation – this is Oracle's Hybrid Integration overview

Integration Overview



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