



HFM migration procedure

Item	Actions
1 Application Settings	Create new application with original .per file
2 Shared Services	Extract security, load to HFM (groups) and to HSS
3 Metadata	Extract, open in windows client, convert and load
4 Rules	Extract, change "INCOME" into "REVENUE" and load
5 Data	Extract, ownership data included, and load
6 Journals	Extract all and load
7 Webforms, datagrids, workspaces	Extract all and load
8 Reports and books	Create reports zip-files, copy into explorer
9 Consolidation	Force calculate first period, consolidate and calculate data
10 Start entities	Start all entities on relevant scenario-year-period
11 Promote entities	Submit historical data and promote actual data to relevant level
12 Excel files	Copy to new directories



HFM migration procedure, remarks

Item	Remarks
1 Application Settings	
2 Shared Services	Default directory on HFM server, access needed
3 Metadata	
4 Rules	
5 Data	Errors on no input cells, due to earlier application changes
6 Journals	Errors on templates, due to earlier application changes
7 Webforms, datagrids, workspaces	Change of directory structure needs attention
8 Reports and books	Reports zip-file size limited; books one by one
9 Consolidation	Force calculate takes a while, check data
10 Start entities	
11 Promote entities	Validation settings
12 Excel files	Security level = 'medium'. Add-In path changes = remove checkmark 'ask to update automatic links'. In formula application separator changes from ; → ,



HFM migration procedure, utilities

		EPM Maestro	Text Editor	Other
1	Application Settings			
2	Shared Services		✓	Excel
3	Metadata	✓		Windows client
4	Rules	✓	✓	
5	Data	✓		
6	Journals	✓	✓	
7	Webforms, datagrids, workspaces	✓		JBR Utility
8	Reports and books			Manual
9	Consolidation	✓		
10	Start entities	✓		
11	Promote entities	✓		
12	Excel files			Manual

Some actions above can also be performed using HFM or Life Cycle Management.