



Converting from Upstream Weblink (v. 7.x) to Oracle Hyperion FDM, Fusion Edition (11.x.x.x)

Purpose

The 8.x version of Upstream Weblink saw major enhancements which created the need for clients of previous versions to go through a conversion routine to migrate their applications. This meant that the upgrade process was no longer a simple “schema” update, as it had been in the past. In order to perform a conversion from the 7.x versions of Upstream Weblink a special conversion tool must be utilized. This is necessary because the 7.x versions of UpStream Weblink used a proprietary database whereas the 8.x versions and beyond began to use SQL or Oracle as the back-end database.

Role of Finit Solutions

Finit Solutions is the recognized global leader in FDM. As Upstream Software’s original consulting and implementation partner, Finit has implemented Upstream/FDM to over 5,000 users and over 4,800 data submission sites. Finit is a member of the Oracle Hyperion FDM Customer Advisory Board, and has performed the largest number of Upstream Weblink to FDM Conversions in the industry. In many cases Finit can perform the conversion remotely by uploading the application files to Finit’s server. Finit will then run the *FDM Conversion Utility*, provide the converted application to the client, and then walk them through the final steps to implement it in their environment.

Process Overview

Upgrade Preparation

1. Use the *Schema Update Utility* to upgrade your existing Upstream Weblink Application to version 7.0.5
2. Install the latest version of FDM on your FDM Server

Migration

1. Determine Migration Level (Metadata only, Metadata and Maps, Metadata/Maps/Data)
2. Run the *FDM Conversion Utility* up to the level that was installed
3. Review Conversion Log to see if all items converted properly



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Standard Post Migration Tasks

1. Perform standard FDM Set Up and Activation steps (see FDM Installation Guide for further details)
2. Integrate with target Oracle Hyperion Application (Enterprise, HFM, Essbase, Planning)
3. Download standard Reports and Templates and load them to the upgrade application

Custom Post Migration Tasks

1. Review and fix Validation Rules
2. Update Object Security
3. Set the default Validation Report ID
4. Copy Inbox files
5. Convert Scripts (event, custom, and import)
6. Update “ProcessStatus” in Database Table
7. Convert Custom Reports from “Crystal” to “Active”

Sample Product Enhancements

1. Menu/Navigation Enhancements
2. Adaptor By Location (allows the loading of data from ONE FDM Application to multiple target Hyperion Applications)
3. Validation Rules Wizard
4. Export to Excel (data, maps, validation rules, validation entities, etc.)
5. New Reporting Tool - *Active Reports* – which eliminates the need to own a separate reporting tool to make reporting changes
6. Complex Logic
7. Map ‘Drill Up’ (can drill from Validation screen to the GL data)
8. Map Restore
9. Info Bar (display of error messages)
10. Enhanced Dimensionality (FDM supports 23 map-able dimensions and 14 Attribute dimensions)
11. Enhanced POV Navigation
12. Drill Through to Source Systems