

## Oracle Hyperion Enterprise: Best Practices for Backups and Virus Scanning [ID 1100507.1]

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### **Applies to:**

Hyperion Enterprise - Version 5.0.1.0.00 and later

Information in this document applies to any platform.

This knowledge document is a replacement for Document 588295.1, 587370.1, 584893.1, 763059.1, 585106.1, 587169.1, 581168.1, 582697.1 and 585862.1 which have been deleted.

### **Goal**

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Back-up guidelines for backing up an Oracle Hyperion Enterprise Application where Internal back-up is not used or in version where it is not available.

Virus Scanning best practice for Oracle Hyperion Enterprise Applications.

### **Fix**

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#### **Best practices for backing up an Oracle Hyperion Enterprise Application**

#### **Terminology**

This article uses the term "Application Folder" (App Folder) to describe the Oracle Hyperion Enterprise Database folder containing the Database files.

This is not the same as the "Software Folder" which contains the Executable code and associated DLL files etc.

Note : the App Folder may be a sub folder of the Software Folder, please be aware of this. The location of both these folders are user definable at install/app creation time.

The default Software Folder being C:\Program files\Hyperion solutions\Hyperion Enterprise.

Application Name (APPNAME) this is the "name " of a particular Oracle Hyperion Enterprise Database created by the user..

To identify your Software Folder, search for the file Hypent.exe, you should only have one copy, resident in your Software Folder.

The App Folder contains the following files amongst other.

APPNAME.EXA  
APPNAME.INI  
APPNAME.lok  
APPNAME.use

It also has sub folders:

\data  
\reports  
\inbox  
\outbox

The App folder is again user definable but, the above sub folders are the default sub folder names.

The Application folder is defined by the APPPATH parameter in your Hypent.ini under each [APPNAME] section. You will find the hypent.ini in the citrix home folder or user profile folder.

Note the hypent.ini may contain several Application defined by the appropriate [APPNAME] sections.

## Backing up the application

We do not recommend the use of software that will backup Enterprise files even if they are open. The common name for this process is "Open File Agent". The possibility for corrupting all or part of the database with files open during a backup process is too great.

Always back up your applications and data before and after you perform significant work on your applications. You should back up an application when you perform the following operations:

- Install software upgrades.
- Implement new applications.
- Application Maintenance.
- Run rollovers.
- Conduct closings.
- Enter a large amount of data.

Develop a process for performing backups that is separate from network and corporate backup procedures. Network and corporate backup procedures might not consider your closing cycles and other aspects of your financial data.

You should schedule backups based on how much and how often your data changes.

You should be able to go back to any definitive point to evaluate your data. For example, if you conduct month-end closings, you should be able to access your month-end closing data from previous months or years.

Always ensure there are no users logged on to any Enterprise or Reporting module when the back-up starts. Set a Back-Up Window (time) in which users know not to log on to the application while the back-up takes place.

An alternative that some clients use when there is no time when all users are out of the database would be to create an AutoPilot routine that extracts security, system, formulas, journals, and data for all categories daily or as often as needed. Then if you cannot get to a clean backup to restore an application, you have the means to rebuild the database. A further precaution would be to have two different routines that extract to different filenames. By running each on alternate days, you will be assured of good extracts no more than one or two days old. AutoPilot can also be used to build a new application.

Always back-up entire APP FOLDER never parts of APP FOLDER

## **Backup an Oracle Hyperion Enterprise application using an AutoPilot taskflow**

When creating the AutoPilot routine, the steps may look like this:

### **1. Change Application.**

Change from a local dummy application to the production application.  
Log into the application with an admin account.

### **2. Extract Security.**

### **3. Extract an Enterprise Application.**

### **4. Extract Logic.**

### **5. Change Category.**

### **6. Extract Enterprise data.**

Use an entity list with all base entities.  
Use an account list with all accounts.  
Include Global.

### **7. Extract Journals.**

Include all periods.

### **8. Change Category.**

### **9. Extract Enterprise data.**

### **10. Extract Journals.**

### **11. Repeat steps 8-10 for all categories.**

### **12. Copy reports from the Reports folder.**

Use Execute File Management Commands and use the Copy function.

### 13. Change Application.

Change back to dummy application.

By changing from a local dummy application to the production app on the server, then back to it when done, any automated backup can still run without a user in the production application

### **Is it possible to create the application backup profile and the scheduling on a different server to where the application directory is located?**

No, it is not possible to have the application backup profile and the scheduling on a different server to where the application files are located. It should be set up on the same server as the application directory.

### **Disconnect Citrix users from system before taking backups**

We cannot recommend to use any kind of script to perform logout/disconnect before backup is taken.

We strongly advise NOT to use the 'kill' command to terminate Oracle Hyperion Enterprise sessions. This command has been known to cause issues with the software. It has resulted in clients having to reinstall software.

Below is a method that some clients are using to get users to logout before taking a backup:

1. Prevent new logons (could be done through Citrix Metaframe).
2. Prompt users to logout from the application several times (could be done through Citrix Metaframe).
3. If users still in the system, a reboot would be preferred instead of the 'kill' command as the Operating System takes care of the disconnection in a milder way than the 'kill' command.

Test in a test environment first. Make sure that the routine minimizes the risk of users doing any changes to the system, data loads, consolidations, etc. when the disconnection is performed.

### **Restoring the application**

The entire database must be restored from the same backup tape.

We do not recommend partial restores under any circumstances. With a partial restore, there is a potential for internal signatures to no longer match causing data to be "lost".

Before restoring a back-up, ensure users are not logged in to any Oracle Hyperion Enterprise module, Enterprise Reporting or any addons i.e Retrieve, Schedules, Dataextend.

When restoring you have the option to either overwrite the present app folder (suggest you clear it first). If you do overwrite the users will be able to connect to the restore with no changes needed.

If you restore to a new App Folder , the users will have to use the "Add Application" option at their logon screen to locate the restored folder and then add the restored application. When they do this, the reference to that particular application is overwritten with the new location within hypent.ini.

Note you can only have one instance of an APPNAME in your hypent.ini file at any one time.

When the users add an APPNAME that is already there, they get a message warning this will Overwrite the Application. It is only the link via the hypent.ini file that gets overwritten and not the Application itself.

Never restore partial applications. ALWAYS THE COMPLETE APP FOLDER.

If the software folder is damaged, run the install program again and select the REPAIR OPTION or run a complete re-install. If you restore a Software Folder from back-up you may run into file registration issues.

## **Virus Scanning**

The APP FOLDER should not be scanned live scanned for viruses.

Exclude the APP FOLDERS from live virus scanning.

Run a full scan over the APP FOLDERS daily when users are not active.

The danger is that the virus scanning software locks a file while scanning, and Oracle HyperionEnterprise cannot then lock the file itself.

Make sure users do not store office documents in the APP FOLDER as these can harbor viruses and need to be live scanned.

## **Versions 6.5 and above**

Oracle Hyperion Enterprise version 6.5.x and 6,5,1.x include an internal back-up routine which does allow back-ups to be taken with active users.

This functionality was not available in earlier versions...

## **Incremental Backups**

Incremental backups are not recommended for Oracle Hyperion Enterprise applications.

The recommended method is to make a backup of the entire application folder including all subfolders whilst all users are logged out of the application

If it is not possible to ensure all users are logged out an application before performing a backup, consider upgrading to Oracle Hyperion Enterprise 6.5 or later where backups can occur whilst users are logged into the application.