

Epm2backup – Application User Manual

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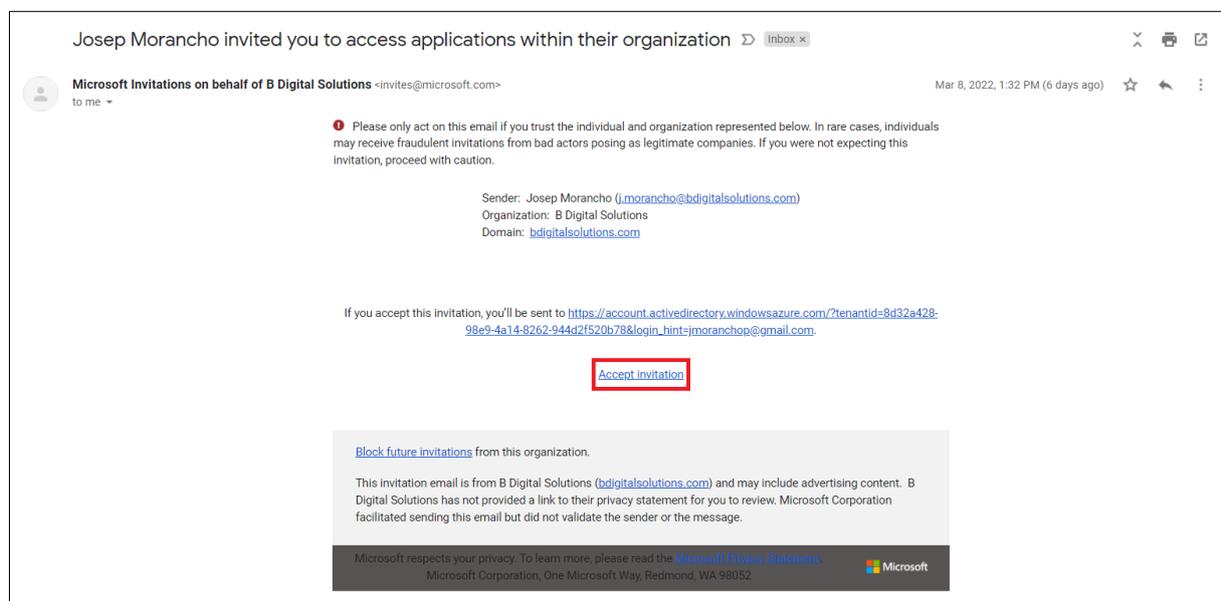
Access to the Epm2backup application

The user to whom the application is shared will receive three emails:

1. An invitation email to the B Digital Solutions Azure Active Directory.
2. An email with the access link to the Epm2backup PowerApps application.
3. An email with this document and with the key to access the PowerApps application of Epm2backup (only it must be entered the first time it is accessed).

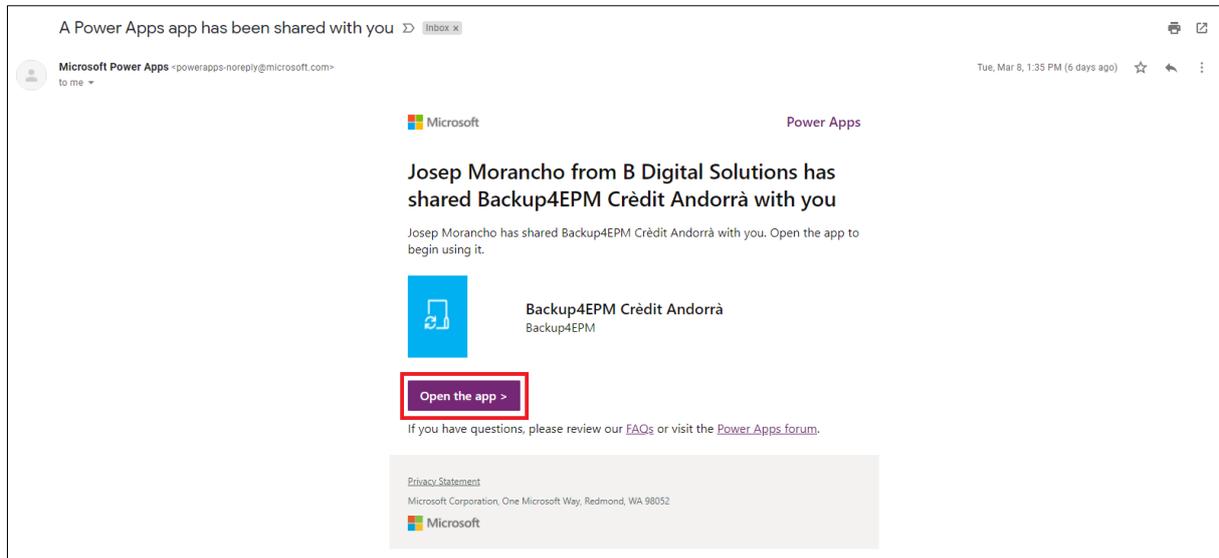
Acceso a Azure Active Directory

First, the user must accept the invitation to the Azure Active Directory from B Digital Solutions. To do this, you will need to click *Invitation* in the email you received in your inbox and follow the steps provided.

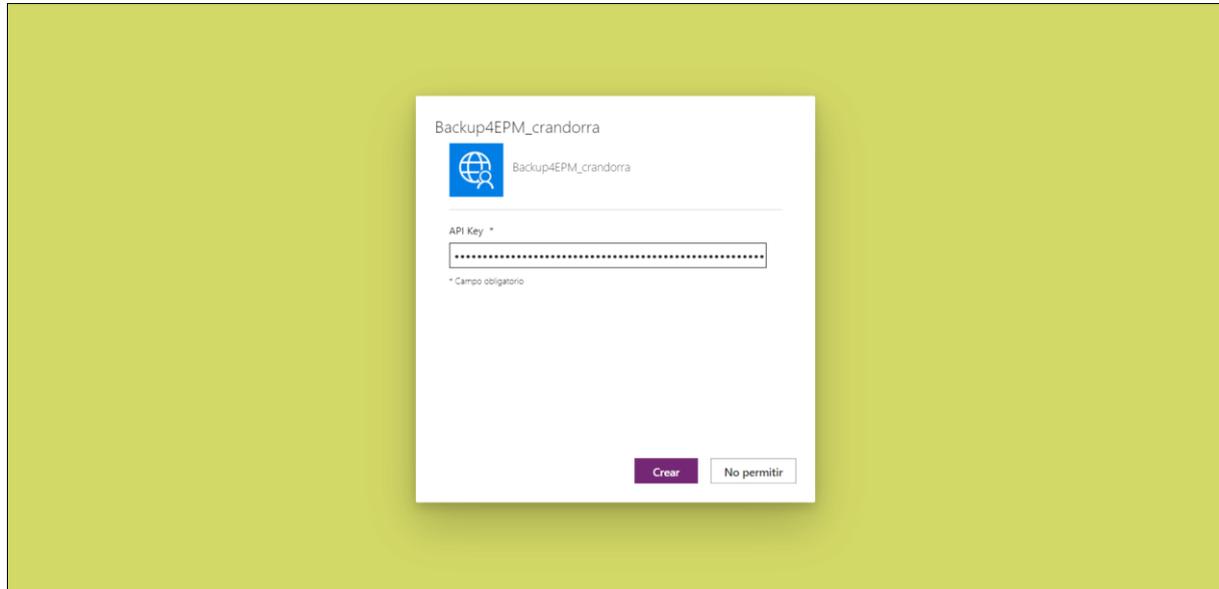


Access to PowerApps

The user ya will then be able to access the application. To do this, you will need to click open *the app* in the email you received in your inbox.



The first time you access the application, you will be required to enter a key. The user must enter the key that will have received in a third email in their inbox and click *Create*.



Finally, by clicking *on Allow* user you will be able to access Epm2backup.

We recommend saving the app URL in browser bookmarks so you can access it more comfortably in the future.

Epm2backup Configuration

Configuration page 'Settings'

On this page, the user can define the data that the application will use to access the EPM Cloud server:

- **Generation:** Determines whether EPM Cloud environments are on a Classic (Gen 1) or OCI (Gen 2) Oracle Cloud infrastructure.
- **Production and Test Environment URL:** the URLs of the production and test environments of EPM Cloud, respectively. It is important that these URLs do not contain '/HyperionPlanning' at the end.
- **Username and Password:** The credentials of the user that the application will use to authenticate to EPM Cloud.

Data entry in *Generation* and *Server URLs* will only be enabled during the first stage of application deployment, but will be disabled to ensure the proper functioning of the application.

In addition, the user will also be able to define those email addresses that will receive alerts from the application. These alerts can be:

- The scheduled backup failed to succeed.
- The 2 TB storage limit is about to run out.

If more than one email address is entered, these must be separated by a semicolon (;), as indicated in the image below.

The screenshot shows the 'Settings' page for Oracle EPM Cloud Server. The page has a green header with a back arrow and the title 'Settings'. Below the header, there is a section titled 'Oracle EPM Cloud Server' with a dashed border. Inside this section, there are four main fields: 'Generation' (a dropdown menu set to '2'), 'Production Environment URL' (a text input field containing 'https://epm-exampleDomain.epm.dataCenter.oraclecloud.com'), 'Test Environment URL' (a text input field containing 'https://epm-test-exampleDomain.epm.dataCenter.oraclecloud.com'), and 'Username' and 'Password' (two text input fields, with the password field masked with asterisks and a 'Change' button next to it). Below the 'Oracle EPM Cloud Server' section, there is a 'Send alerts to' field containing 'user1@domain.com;user2@domain.com'. At the bottom right of the page, there is a green 'Submit' button.

Setup 'Schedule'

On this page, the user can define how the scheduled backups will take place and what retention policies will be applied to them.

⏪
Schedule Settings

Hour (UTC) 05 : 00

<p style="text-align: center; font-weight: bold;">Daily Backup</p> <p>Days of the week</p> <p><input checked="" type="checkbox"/> Monday</p> <p><input checked="" type="checkbox"/> Tuesday</p> <p><input checked="" type="checkbox"/> Wednesday</p> <p><input checked="" type="checkbox"/> Thursday</p> <p><input type="checkbox"/> Friday</p> <p><input type="checkbox"/> Saturday</p> <p><input type="checkbox"/> Sunday</p> <p style="margin-top: 10px;">Retention: 4 week/s</p>	<p style="text-align: center; font-weight: bold;">Monthly Backup</p> <p>Day of the month</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">January 31</td> <td style="width: 50%;">July 31</td> </tr> <tr> <td>February 28</td> <td>August 31</td> </tr> <tr> <td>March 31</td> <td>September 30</td> </tr> <tr> <td>April 30</td> <td>October 31</td> </tr> <tr> <td>May 31</td> <td>November 30</td> </tr> <tr> <td>June 30</td> <td>December 31</td> </tr> </table> <p style="margin-top: 10px;">Retention: 12 month/s</p>	January 31	July 31	February 28	August 31	March 31	September 30	April 30	October 31	May 31	November 30	June 30	December 31	<p style="text-align: center; font-weight: bold;">Annual Backup</p> <p>Day of the year</p> <p style="text-align: center;">31/12 📅</p> <p style="margin-top: 10px;">Retention: 3 year/s</p> <p style="text-align: right; margin-top: 20px;">Submit</p>
January 31	July 31													
February 28	August 31													
March 31	September 30													
April 30	October 31													
May 31	November 30													
June 30	December 31													

There are 4 controls:

- **Hour (UTC):** Defines the time at which scheduled backups will run. It is important that this time does not coincide with the time oracle performs the daily backup of the EPM Cloud server, so that they are not stepped on.
- **Daily Backup:** Defines the days of the week that the daily backup will run and the retention policy that will be applied to this type of backup.
- **Monthly Backup:** Defines the day of each month that the monthly backup will run and the retention policy that will be applied to this type of backup.
- **Annual Backup:** Defines the day of the year that the annual backup will run and the retention policy that will be applied to this type of backup.

Retention policies define how long each type of scheduled backup will be kept in storage before being automatically deleted by the application.

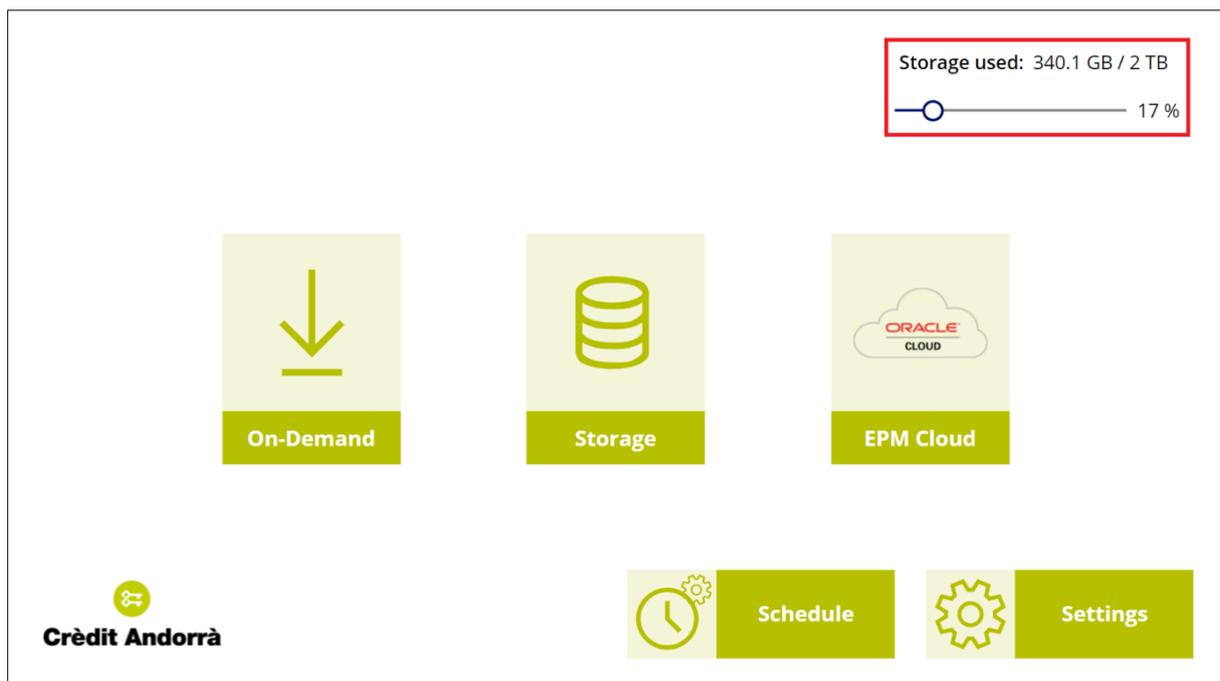
It is important that the size of each backup be taken into account when defining retention policies if you do not want to exceed the 2 TB storage limit of the standard application license.

Using the app Epm2backup

Home page

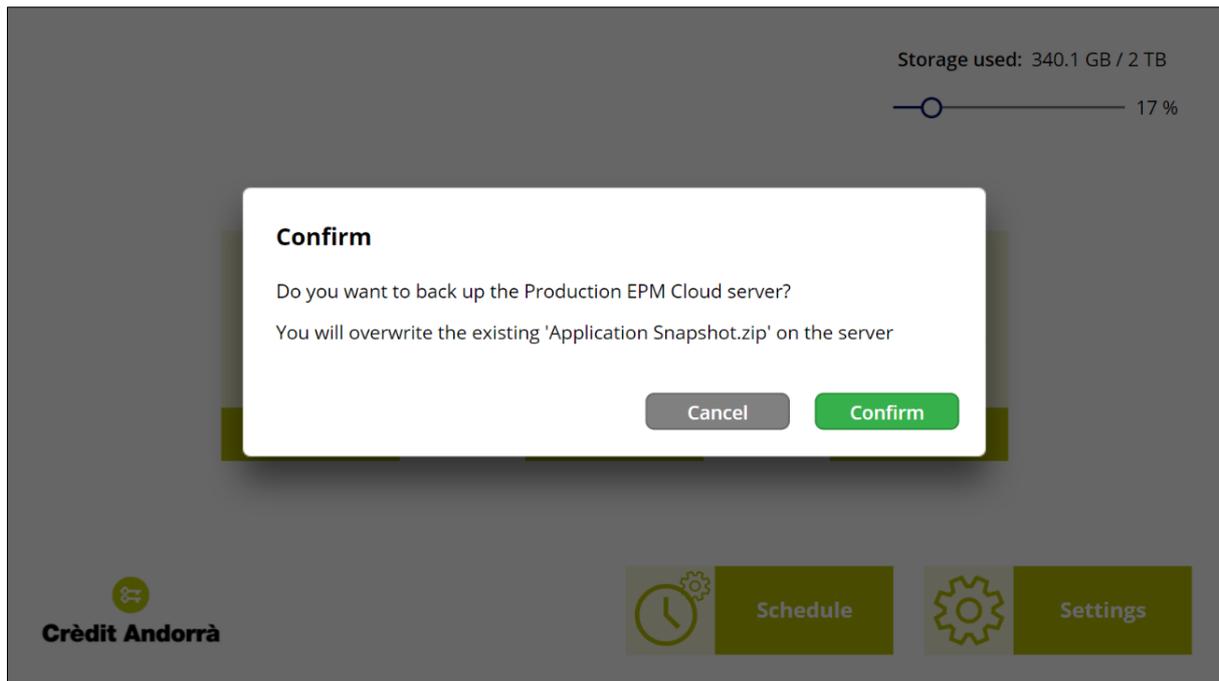
When accessing the application, the user is shown the home page. From here you can access any of the pages that the application has.

In the upper right corner, an indicator of the occupancy status of the storage, where the backups are stored, is displayed.



Running backup on demand 'On-Demand'

When you click *On-Demand*, the application prompts for confirmation to back up the EPM Cloud production environment to its current state. If accessed, the process will start running and you will receive a confirmation by mail once it is finished, whether it ends successfully or ends with errors. In case it finishes successfully, the confirmation email will also indicate the name under which the backup has been saved to storage.



Storage page

On this page, the user can manage the backups available in storage.

Initially, you choose what type of backup you want to manage. There are two different types of backups:

- On demand 'On-Demand': executed manually from the application por el usuario.
- Programmed 'Scheduled': executed automatically by the system according to the programming that has defined the user on the *Schedule* page.

In both cases, available backups are filtered by year and month. In the upper right corner, it is shown in which path within the storage we are in the following format:

'{security type of copia}/{year}/{month}'

At any time, you can return to the previous directory within the storage path by clicking on the first record '... '.

Once the available backups are displayed, you can see both the name and the date of creation of each one, among other fields that will depend on the type of backup, and that we will discuss below.

On-Demand Security Copias

Storage Files			On-Demand/2022/02		
Name	Created On	Note			
...			1	2	3
 Artifact Snapshot_2022_02_27_21_24_39.zip	27/02/2022 22:35:53	Això és un comentari	<input checked="" type="checkbox"/>		
 Artifact Snapshot_2022_02_25_19_58_07.zip	25/02/2022 20:52:59		<input checked="" type="checkbox"/>		

As shown in the image above, the following functionalities are available when managing on-demand backups:

1. Definición de comentarios

You can define comments to identify on-demand backups, so that you can know in which scenario they were made (for example, before significant modifications).

Storage Files			On-Demand/2022/02		
Name	Created On	Note			
...					
 Artifact Snapshot_2022_02_27_21_24_39.zip			<input checked="" type="checkbox"/>		
 Artifact Snapshot_2022_02_25_19_58_07.zip			<input checked="" type="checkbox"/>		

On-Demand/2022/02/Artifact Snapshot_2022_02_27_21_24_39.zip

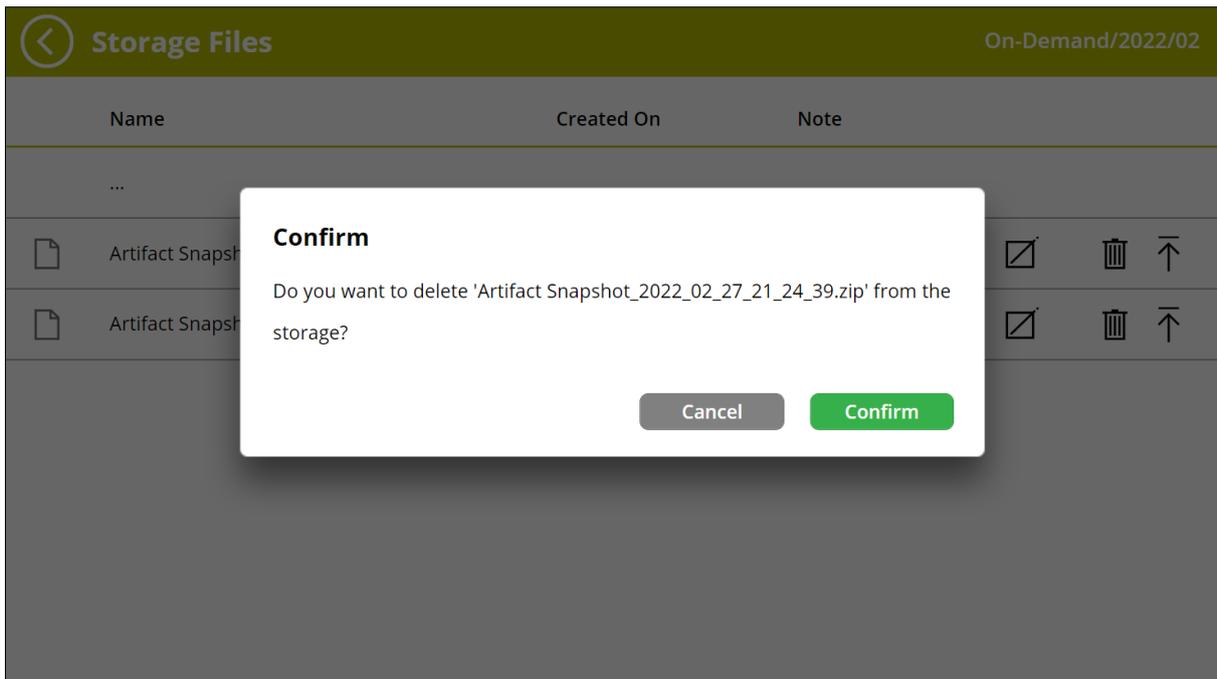
Això és un comentari

2. Deleting

Because on-demand backups do not follow the retention policies that follow the scheduled ones, the user is free to delete them to free up storage when they see fit.

Clicking the icon will open a confirmation message asking if you really want to delete the selected backup.

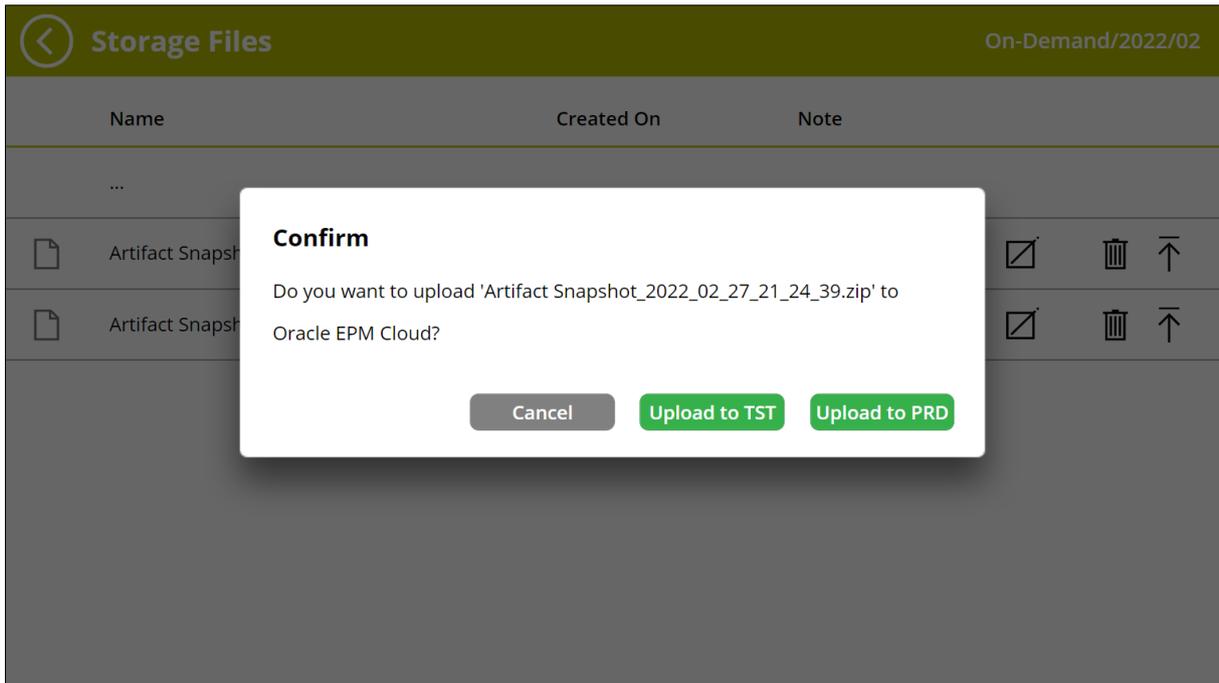
The system has a security system that allows the recovery of a backup within 7 days of its deletion. If the user mistakenly deletes a backup they can contact the B Digital Solutions team within this period for recovery.



3. Upload to EPM Cloud

Clicking on the icon will open a confirmation message asking the user to which of the two EPM Cloud environments they want to upload the selected backup: production or test.

Regardless of the environment you decide to upload it to, the process will start running and we will receive a confirmation by mail when you are finished, whether it ends successfully or ends with errors.



Programming security backups 'Scheduled'

Storage Files		Scheduled/2022/03	
Name	Created On	Type	
...		1	2
Artifact Snapshot_2022_03_14_05_00_00.zip	14/03/2022 06:09:52	daily	↑
Artifact Snapshot_2022_03_10_05_00_00.zip	10/03/2022 06:09:30	daily	↑
Artifact Snapshot_2022_03_09_05_00_00.zip	09/03/2022 06:16:27	daily	↑
Artifact Snapshot_2022_03_07_05_00_00.zip	07/03/2022 06:08:28	daily	↑
Artifact Snapshot_2022_03_03_05_00_00.zip	03/03/2022 06:12:23	daily	↑
Artifact Snapshot_2022_03_02_05_00_00.zip	02/03/2022 06:09:20	daily	↑
Artifact Snapshot_2022_03_01_05_00_00.zip	01/03/2022 06:09:58	daily	↑

As indicated in the image above, when managing scheduled backups, the following field and functionality is available:

1. Scheduled backup type

Indicates whether the scheduled safety backups is *daily*, *monthly*, or *annual*.

2. Upload to EPM Cloud

As with on-demand backups, clicking the icon will open a confirmation message asking the user which of the two EPM Cloud environments they want to upload the selected backup to: production or test.

Once the process has started, we will receive a confirmation by mail when it is finished, regardless of the environment to which it is decided to upload it and whether it ends correctly or ends with errors.

The possibility of deleting backups is not incorporated, since these are deleted in accordance with the retention policies defined on the 'Schedule' page.

Page of EPM Cloud

On this page, the user can view and manage the backups available in EPM Cloud environments.

The user will access by default in the production environment, but can switch between the two environments using a drop-down in the upper right.

For both environments, both the name and the date of last modification of the backup are displayed, as well as the possibility of deleting it.

Oracle EPM Cloud Files		Production
Name	Last Modified	
 Artifact Snapshot.zip	28/03/2022 05:07:04	