



Energy Portfolio Management

Migrating to a New Version of EPM Operations

Release 5.7.0.0

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The product described in this documentation may be connected to, and/or communicate information and data via, a network interface, which should be connected to a secure network. It is your sole responsibility to ensure a secure connection to the network and to establish and maintain appropriate measures (such as but not limited to the installation of firewalls, application of authentication measures, encryption of data, installation of antivirus programs, etc.) to protect the product, the network, your systems, and the interface against any kind of security breach, unauthorised access, interference, intrusion, leakage, damage, or corruption or theft of data. We are not liable for damages or losses related to any such security breach, unauthorised access, interference, intrusion, leakage, damage, or corruption or theft of data.

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Chapter 1: Overview

About this Document

This document provides key information guiding administrators and DBAs migrating to a new version of Retail Operations, Market Operations, Demand Management Response System, and Counterparty Settlement and Billing (referred to collectively as EPM Ops Server). The document is organized into the following chapters:

- **Chapter 1: Overview** (this section)
- **Chapter 2: Documentation Overview** – target audience, applicable products, and if it's required reading.
- **Chapter 3: Common Migration Activities**

Intended Audience

The EPM Ops Server consists of a J2EE-compliant application server and an Oracle database server. The EPM Ops Server is supported at most customers by two roles:

- **Admin:** A user authorized to log into the application with the Administrator role, and usually has responsibility over the Tomcat application server on Windows.
- **DBA:** A user who can log into SQLPLUS and run build and migration scripts as the EPM Ops schema user. The Oracle DBA privilege is not required for migrations.

Each section of this Guide specifies who it's intended for, whether Admin, DBA, or both.

Chapter 2: Documentation Overview

The EPM Ops Server software installs a Docs folder containing between six and 10 different PDFs, of which only two or three are required references for version migration. This section lists each document's name and if the document is applicable to migration.

Release Notes

Applicable Products:	All
Required Reading for Migration:	Yes
Target Audience:	DBA and Admin

Certified Environments

Applicable Products:	All
Required Reading for Migration:	Yes
Target Audience:	DBA and Admin

Database Migration Guide

Applicable Products:	All
Required Reading for Migration:	Yes
Target Audience:	DBA

Server Installation Guide

Applicable Products:	All
Required Reading for Migration:	Yes
Target Audience:	DBA and Admin

Load Aggregation Implementation Guide

Applicable Products:	All
Required Reading for Migration:	Only if specified in release notes

CSB Benchmark Energy Setup Guide

Applicable Products:	Counterparty Settlement and Billing
Required Reading for Migration:	Only if specified in release notes

IE T&D User Guide

Applicable Products:	Market Operations Ireland
Required Reading for Migration:	Only if specified in release notes

SEM Implementation Guide

Applicable Products:	Market Operations Ireland
Required Reading for Migration:	Only if specified in release notes

SEM Credit Cover

Applicable Products:	Market Operations Ireland
Required Reading for Migration:	Only if specified in release notes

Contracts for Differences (CfDs)

Applicable Products:	Market Operations Ireland
Required Reading for Migration:	Only if specified in release notes

Chapter 3: Common Migration Activities

What's new in this release?

While the Release Notes are directed at business users, some items may have instructions relevant to Administrators regarding updating any UI configuration changes or loading new product/component definitions. Administrator users should review the release notes for any items related to these two topics in particular.

How do I apply any database changes?

Any new version you receive will have migration scripts allowing you to migrate from either of the two most recent prior GA releases to this new release. The General Instructions chapter of the Database Migration Guide has detailed steps for the migration, and specifies the information you will be prompted for.

The Database Migration Guide is your **primary reference** for the vast majority of what you need to do for the new version.

How do I deploy the new website?

The Server Installation Guide contains instructions for deploying new websites. The instructions are located in the section named Install the EPM Ops Web Application, and assume the use of Tomcat 9. The WAR files used to deploy the websites are located in the Web folder created by the server install executable of the new version. By default, this location is `C:\Ventyx\<ProductName>\<Version>\Web`.

If you do not have access to the Tomcat Admin website, update the authentication for the new application website by editing the entry value for the authType in the website's WEB-INF/web.xml file.

What additional things might I need to do?

Market Operations Ireland in particular typically includes new definitions for products and components. These definitions are provided in a text file with the extension ROML. Instructions for importing the new definitions are found in the Database Migration Guide, in the section named Update Market Interfaces.

New market-specific configurations for the user interface may also be included with the new version. Generally these are added as part of the automated migration but if the configurations need to be loaded manually, instructions are found in the Database Migration Guide in the section named Manually Loading Market-Specific Configuration.