Oracle Financial Services Balance Sheet Planning (OFS BSP)

Installation and Configuration Guide

Version 8.0.1.0.0

ORACLE
FINANCIAL SERVICES

DOCUMENT CONTROL

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Executive Summary

This document includes the necessary instructions to apply 8.0.1.0.0 Minor Release for Oracle Financial Services Balance Sheet Planning and perform the required post install configurations. You can find the latest copy of this document in OTN Library.

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Preface

This document provides step-by-step instructions to install the OFS BSP 8.0.1.0.0 Release.

This chapter discusses the following topics:

- Audience
- How this Guide is organized

Audience

Oracle Financial Services Balance Sheet Planning Installation and Configuration Guide is intended for administrators, and implementation consultants who are responsible for installing and maintaining the Oracle Financial Services Balance Sheet Planning product.

Prerequisites for the Audience

The document assumes that you have experience in installing Oracle Enterprise Performance Management components and basic knowledge about the following is recommended.

- Oracle Financial Services Balance Sheet Planning product
- UNIX Commands
- Database Concepts

How this Guide is Organized

The Oracle Financial Services Balance Sheet Planning Installation and Configuration Guide include the following topics:

- OFS BSP Release 8.0.1.0.0
- Appendix A

1 OFS BSP Minor Release 8.0.1.0.0

This Minor Release of OFS BSP is cumulative and includes all enhancements and bug fixes done since the OFS BSP v8.0.0.0.0.

1.1 Supported Software Versions

Hyperion 11.1.2.4.0 for Oracle Enterprise Performance Management System

Note: For BSP 8.0.1, you need to turn on the “Compatibility Mode” on Internet Explorer 11.

1.2 Pre Installation Requirements

You should have OFS BSP 8.0.0.0.0 installed.

1.3 How to Apply This Minor Release?

1.3.1 Installing OFS BSP

Refer to the following instructions to download, extract, install, and configure this minor release.

1. Login to https://support.oracle.com/ and search for 21301785 under the *Patches & Updates* tab.
2. Download the patch **p21301785_linux.zip** or **p21301785_solaris.zip** depending on the OS and unzip the downloaded patch file to the $EPM_ORACLE_HOME/OPatch directory on Planning Server.

Note: If you are upgrading BSP 8 with 8.0.1, then before starting the upgrade, copy the config.xml separately and modify this to add **Net Service Name** entry. Replace this config.xml file in patch.

3. Stop all the EPM services running on the Planning server where this patch is being applied, including the Planning server, RMI services, and Financial Reports.
4. On the Planning server machine, from the command line, change the directory to $EPM_ORACLE_HOME/OPatch and apply the patch using opatch command.
5. Go to path $EPM_ORACLE_HOME/bsp and execute the shell script bsp_webdeploy.sh. Deploy the HyperionPlanning.ear file generated under directory $EPM_ORACLE_HOME/bsp/ear_to_deploy to the Planning server.
6. Give execute permission to the shell script bsp_cfebinary_deploy.sh under $EPM_ORACLE_HOME/bsp and execute it.
7. Give execute permission to the shell script finalize_bsp_install.sh under $EPM_ORACLE_HOME/bsp and execute it.

8. Verify that the variable $ORACLE_HOME has correct value set in the file $EPM_ORACLE_HOME/products/Planning/bin/bsp_user_profile.sh

9. Follow the steps mentioned below to upgrade an already initialized BSP 8.0.0.0.0 application

   a. Make a copy of the file $EPM_ORACLE_HOME/products/Planning/lib/bspudf.jar with the name bspudf.cdf.jar.

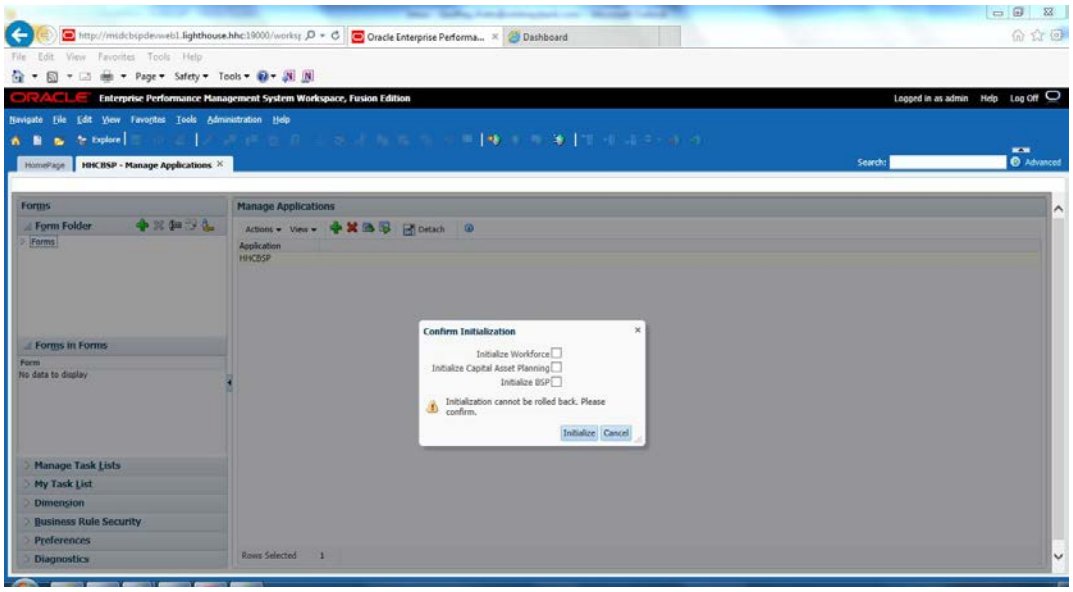
   b. Replace the existing bspudf.cdf.jar under path $MIDDLEWARE_HOME/user_projects/epmsystem1/EssbaseServer/essbaseserver1/app/<application_name>/ with the bspudf.cdf.jar created as per above step.

10. Restart all the services on the Planning server that were stopped in Step 1, including the Planning server, RMI services, and Financial Reports services.

11. To upgrade an existing application where BSP 8.0.0.0.0 is already initialized, Login to Hyperion workspace and go to following path:

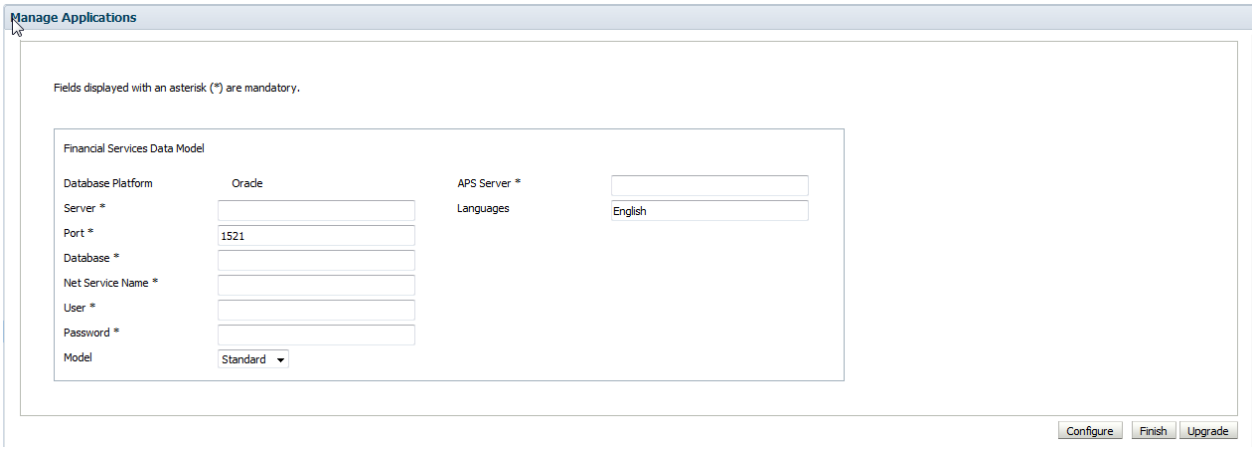
    Navigate-> Applications->Planning-> Select the application name (which needs to be upgraded).

    Navigate to Administration-> Application --> Manage Application->Select the Application Name. Proceed for BSP Initialization for the selected application through Actions -> Initialization -> Initialize BSP. Click Initialize.



Now, you will be navigated to BSP specific Initialization UI, where the details to be captured will be displayed.

Specify the required initialization parameters and click the “Upgrade” button.



On successful completion of Upgrade, a pop-up with success message is displayed. You can check the logs on server under path $EPM_ORACLE_HOME/logs/bsplog/bsplog.log.

Note: "Finish" button should not be clicked for the Upgrade process or after completion of the Upgrade activity. Upgrade is a onetime activity and cannot be rolled back.

12. When you are upgrading BSP 8 to 8.0.1, then access the Configuration UI and enter the details in this UI manually and Save. Also, verify these details with respect to **odbc.ini** file. The $EPM_ORACLE_HOME/bsp/BSP_RunOnPlanning.sh and $EPM_ORACLE_HOME/bsp/BSP_RunOnEssbase.sh scripts must be also be run after making these updates in a distributed environment. For more information, refer to the *BSP 8 User Guide*.
13. On successful completion of Upgrade, a pop-up with success message is displayed. You can check the logs on server under path $EPM_ORACLE_HOME/logs/bsplog/bsplog.log.

    Note: "Finish" button should not be clicked for the Upgrade process or after completion of the Upgrade activity. Upgrade is a one time activity and cannot be rolled back.
14. If you are upgrading BSP 6.1 or 8.0.0 to 8.0.1 or 8.0.2, then remove the redundant members, under existing rollup in RateElement and Assumptions. In BSP 8.0.1, the interest rate codes are suffixed with "_IRC".
15. To create a new application, refer to Oracle Financial Services Balance Sheet Planning Installation and Configuration Guide PS4 Release 8.0.0.0.0.
16. For distributed environment setup, refer to *Distributed Environment Setup* section.

Note: When you are running cash flow engine and received file access error, then check the $ARBORPATH or the registry of it to determine the Essbase server location.

Appendix A - Distributed Environment Setup

Perform the below steps when Hyperion Planning is installed in a distributed environment, that is, the Hyperion components, Planning and ESSBASE are installed on separate servers.

Note:

- Hyperion ESSBASE should not be installed on Windows
- Hyperion ESSBASE and Hyperion Shared Services must be installed on the same UNIX Server
- The OS/Version of the server where Planning is installed must be the same as the OS/Version of the server where ESSBASE is installed.
- Steps mentioned below should be repeated after every
  I. Initialization/re-initialization of Hyperion Planning generic application(s) created for Balance Sheet Planning using “Administration→ Application → Manage Application”.
  II. Update of Configuration settings for Balance Sheet Planning using “Master Maintenance→Assumption Forms→Configuration”.

Perform the following steps in the given sequence.

1) Ensure that tnsnames.ora on the ESSBASE server is configured with the same name as on the Planning server.
2) Save the Configuration Parameters in Planning; while saving the configuration, make sure that LCMDIRPATH is the LCM export path as on the ESSBASE server.
3) $MIDDLEWARE_HOME/user_projects/epmsystem1 is the default Planning instance path for default installation.

   In case, if planning is installed in a different path, then modify the environment variable "EPM_ORACLE_INSTANCE" in the below files.

   $EPM_ORACLE_HOME/products/Planning/bin/bsp_user_profile.sh

   $EPM_ORACLE_HOME/bsp/BSP_RunOnPlanning.sh

   $EPM_ORACLE_HOME/bsp/BSP_RunOnEssbase.sh.

   Also, replace the occurrences of “epmsytem1” in the above files with the directory where planning is installed.
4) Give execute permission to “BSP_RunOnPlanning.sh” under **$EPM_ORACLE_HOME/bsp** directory on the Planning server and run the script without passing any parameters. The script will create a gzip archive “bsp.tar.gz” in the same folder.
5) Copy “BSP_RunOnEssbase.sh” and “bsp.tar.gz” from **$EPM_ORACLE_HOME/bsp** to **$EPM_ORACLE_HOME** in ESSBASE server.
6) Give execute permission to “BSP_RunOnEssbase.sh” and run the script without passing any parameters.
7) On the ESSBASE server, modify bsp_user_profile.sh present under **$EPM_ORACLE_HOME/products/Planning/bin**, and set the ORACLE_HOME as appropriate.

OFSBSP
8.0.1.0.0 Installation and Configuration Guide

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