

**Balance Sheet Planning**  
**Upgrade from v6.1 to v8.0.1**

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## ***Background***

BSP v6.1.x is certified against Hyperion v11.1.2.3.x, where as BSP 8.0.x is certified against v11.1.2.4.x. An upgrade from BSP v6.1 to BSP 8.0 would require that the Hyperion version too should be upgraded from v11.1.2.3.x to v11.1.2.4.x.

This document restricts itself to the steps required to upgrade the BSP artifacts from a standalone install of BSP v6.1 to v8.0, on each Hyperion Planning application.

This document should not be used if the BSP instance shares the database-schema with that of an OFSAAI information domain.

## ***Preparing for Upgrade***

This document describes the steps required to upgrade one Hyperion instance containing 1/more BSP 6.1 Planning-apps to the new version. If you have more than one Hyperion instance, then you should follow the steps in this document once or each such instance.

In Hyperion Planning, each BSP application would have been initialized against an Oracle database-schema. As part of this upgrade, some objects within such schema may be modified. It is recommended that you have adequate back-ups of these database schemas, as these backups may be required if you wish to subsequently rollback the system to its earlier state.

You should also backup all the Hyperion instances.

Prepare an inventory of all post-install customizations made to BSP 6.1 – like standard forms (both new as well as changes to pre-packaged standard forms), Calc-manager rules (both new as well as changes to pre-packaged rules) etc. After the completion of the upgrade, you may need to repeat most of these customizations.

## ***Upgrade methodology***

The steps to upgrade have been categorized into 3 broad categories, as below

1. Steps to be performed, prior to upgrade
2. Perform an in-place upgrade of Hyperion from v11.1.2.3.x to v11.1.2.4.x
3. Transferring BSP metadata
4. Completing the upgrade

Each of these is described in sufficient detail below.

## Step-1: Prior to in-place upgrade

1. Backup the BSP 6.1 database-schema (as specified in the BSP's Configuration UI) – this is required if ever you need to revert back to the original schema

*Note: Repeat this step for each Hyperion Planning-app that contains BSP 6.1.*

## Step-2: Preparing the Hyperion instance

2. Perform an in-place upgrade of Hyperion 11.1.2.3.0 to 11.1.2.4.0 (Note: Hyperion Support should be able to help with detailed instructions / assistance for an in-place upgrade of Hyperion)

*Note: If different Hyperion components are installed on different servers, then you should upgrade the Hyperion version across all of such servers.*

3. Install BSP 8.0 on Hyperion Planning

## Step-3: Transferring BSP metadata

*Note: all of the below steps need to be performed on each Hyperion planning-app that contains BSP 6.1*

4. Use Hyperion LCM export functionality to export BSP-related dimensions from the BSP 6.1 planning-app. The list of dimensions to export is enumerated in Appendix-A.
5. Backup any other customizations you may have made to BSP 6.1 (standard forms, calc-manager scripts, custom dimensions etc.)
6. Create a new Planning Application. Initialize BSP into this new Planning Application

*Note: Initialization should be done using the same model-type as in BSP 6.1 (Standard / Custom-1 / Custom-2). Since BSP 8.0 supports initialization in multiple languages, please initialize BSP 8.0 in English only.)*

*Note: If you want to create the new planning application with the same name as that of older planning application (that contains BSP 6.1), then*  
a) Delete the older planning application (that contains BSP 6.1)  
b) Delete the entry for this older planning application from the config.xml file located in the directory  
`$MIDDLEWARE_HOME/user_projects/epmsystem1/Planning/planning1`

7. Perform an LCM import into the new BSP application, using the export created in step-4 above

8. Point the BSP 8.0 Planning-Application to the BSP 6.1 schema, via the BSP configuration UI.
9. Upgrade this schema using the accompanying shell-script (upgrade\_bsp\_schema\_61\_80.sh). The usage of this script is described in Appendix-B
10. Run metadata synchronization
11. Redo and/or import any customizations made to BSP v6.1 within Hyperion – as backed up in step-5 above
12. If the original BSP 6.1 Planning-Application has any other modules present (like Capex, Workforce etc), execute the required steps to port these modules into the new Planning-Application

### **Completing the upgrade:**

13. Login to BSP and proceed to define Pricing Margin assumptions, COA Characteristics and Maturity Mix assumption.
14. Rerun the current and new business calculations
15. If the new planning application created in step 6 above has a different name than the older planning application(that contains BSP 6.1) then
  - a) Delete the older planning application (that contains BSP 6.1).
  - b) Delete the entry for this older planning application from the config.xml file located in the directory \$MIDDLEWARE\_HOME/user\_projects/epmsystem1/Planning/planning1
16. Apply BSP 8.0.1 opatch on Hyperion Planning, and follow the instructions as per the installation-guide to upgrade BSP to v8.0.1.

## ***Appendix-A***

### **List of Hyperion dimensions to export, using LCM**

- Chart of Account
- Entity
- Strategy
- Custom1 (if present)
- Custom2 (if present)

## ***Appendix-B***

upgrade\_bsp\_schema\_61\_80.sh : Shell-script to upgrade a BSP v6.1 database-schema to v8.0. This script should be executed from the Hyperion Planning user-profile.

This script expects the EPM\_ORACLE\_HOME and ORACLE\_HOME environment variables to be set. If either of these environments are not set, the script will terminate with an error.

This script accepts the following parameters

#	Name	Description	Optional/Mandatory
1	Model –type	The model-type in which BSP has been initialized.  Valid values are: S/C1/C2.  Where:  C 1 mean Custom C2 means custom-2 S means Standard	Mandatory
2	TNS	The TNS Name of the database/SID, that hosts the BSP 6.1 database-schema	Mandatory
3	User	The name of the BSP 6.1 database-schema	Mandatory
4	Password	The database-schema password	Optional.  If not specified, you will be prompted for a password