ORACLE
INSURANCE

Oracle Insurance Insight

Oracle Insurance Insight Administration Guide

version 7.0.2

Part number: E24031-01

October 2011

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CONTENTS

Preface

Welcome to the *Oracle Insurance Insight Administration Guide*. This guide presents the information you will need to manage data and user accounts in Oracle Insurance Insight (OII) using the administrative tools of Oracle Business Intelligence Enterprise Edition (OBIEE).

This is not a complete system administrator's guide for OBIEE. The purpose of this manual is to describe the basic administrative duties that you will need to perform in order to maintain the data in OII.

Version

This manual corresponds to Oracle Insurance Insight (OII) version 7.0.2.

Intended Audience

This manual is intended for experienced system administrators with advanced knowledge of OBIEE 11g and OII.

Related Documents

For more information, refer to the following documents:

- *Oracle Insurance Insight Release Notes* - This document describes the latest enhancements and updates to OII as well as issues that have been resolved in this version.
- *Oracle Insurance Insight Installation Guide* - This manual describes the steps for configuring and installing OII.
- *Oracle Insurance Insight Warehouse Palette User Guide* - This manual describes how to use the Warehouse Palette, an application that provides users with an easy-to-use interface to create and configure a Line of Business (LOB) and "publish" the LOB for incorporation into the OII system.
- *Oracle Insurance Insight Implementation Guide* - This manual describes the concepts and steps involved in implementing the OII system.
- *Oracle Insurance Insight User Guide* - OII uses OBIEE 11g as its front end interface, providing a set of dashboards, reports, and query building tools to use to analyze the OII data. This manual describes how to configure and run the OII reports as well as use the OBIEE analytic features to build custom queries to run against the OII data.
- *Oracle Insurance Insight Data Dictionary* - The data dictionary for the OII system.

Relevant Oracle Documentation

For complete documentation on OBIEE and its components, please go to the documentation section of the Oracle website to consult the following manuals:

- *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition (11g Release)*

OII Documentation on the Oracle Technology Network (OTN)

The OII documentation set is packaged with the product release. You can also obtain these guides online thought the Oracle Technology Network (OTN) at this address:

http://www.oracle.com/technology/documentation/insurance.html

Customer Support

If you need help with Oracle Insurance Insight, please log a Service Request using My Oracle Support at https://support.oracle.com.

Address any additional inquiries to:

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Chapter 1

Introduction to the OII Application Roles, Groups, and Users

The OII system administrator must create and configure the necessary OII application roles, security groups, and users to ensure that OII users are granted access to the proper data within Oracle Business Intelligence (OBIEE). Note that this is not a complete administrator's guide to OBIEE security. For that, refer to the *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition.*

An **application role** represents a role a user has when using OBIEE. Within the OII dashboards for OBIEE there are five OII roles:

- Actuary
- Claims Management
- Executive
- Production
- Underwriting

The role(s) assigned to a user determines the content that appears when the user first logs into OBIEE and accesses the OII Scorecard and Analysis dashboards. Users can be assigned one or more application roles. Only the tabs corresponding to an assigned role will appear on the dashboard. Figure 1, for example, shows the OBIEE dashboard for a user who has been assigned all five OII roles.

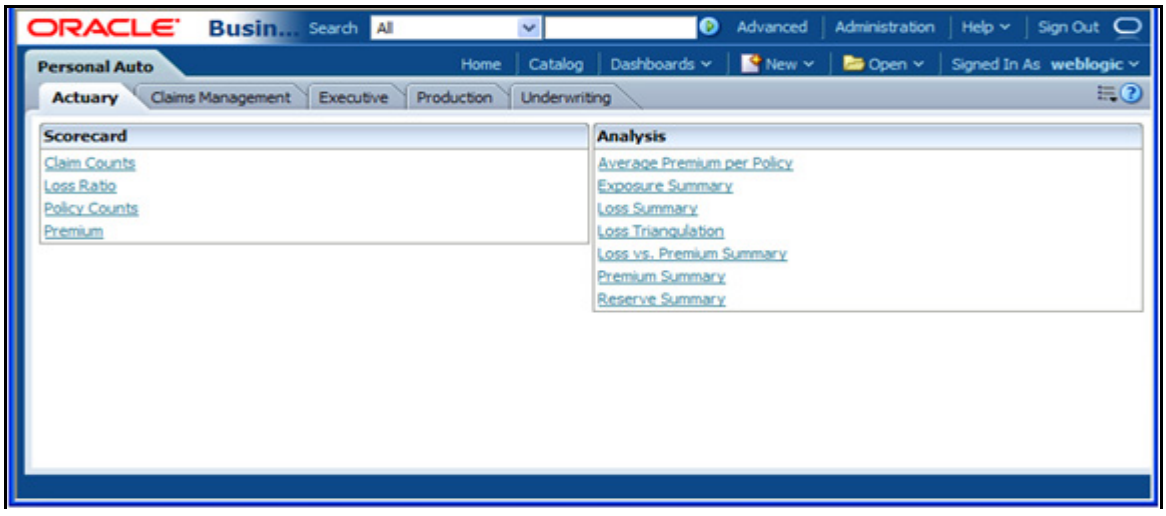

Figure 1: Tabs in OBIEE Correspond to the OII Roles

WHAT ARE THE OII SYSTEM ADMINISTRATOR'S TASKS?

The system administrator's tasks include the following:

1. **Create the Application Roles for OII**

   Use the **Oracle Fusion Middleware Control** to create the OII application roles:

   - BIActuary
   - BIExecutive
   - BIUnderwriter
   - BIProducer
   - BIClaimsManager

2. **Create the Security Groups for OII**

   The following security groups must be created for OII in the **Oracle WebLogic Server Administration Console.**

   - BIActuaries
   - BIClaimsManagers
   - BIExecutives
   - BIProducers
   - BIUnderwriters

3. **Create the OII Users**

   Use the **Oracle WebLogic Server Administration Console** to create the OII users who will access the OII data in OBIEE.

4. **Assign the OII Users to the OII Groups**

   Use the **Oracle WebLogic Server Administration Console** to add the OII users to the proper OII groups.

5. **Map the OII Groups to the OII Application Roles**

   Use the **Oracle Fusion Middleware Control** to map each OII group to an appropriate OII application role to grant its permissions to group members.

6. **Map the OII Application Roles to the BIAuthor and BIConsumer Application Roles**

   Use the **Oracle Fusion Middleware Control** to map the OII Application Roles to the BIAuthor and BIConsumer Application Roles that are shipped with OBIEE.

7. **Test the OII Users in OBIEE**

   Log into OBIEE and ensure that the users assigned to a particular role only see the content on the dashboards that has been designated to them.

WHAT TOOLS WILL THE OII SYSTEM ADMINISTRATOR USE?

The system administrator will use the following tools to configure the OII components for OBIEE:

- Oracle Fusion Middleware Control
- Oracle WebLogic Server Administration Console

OPENING THE ORACLE FUSION MIDDLEWARE CONTROL

1. Launch the Enterprise Manager by entering the following URL in your browser:

   http://<hostname>:7001/em

Note	In the above URL, <hostname> can be the server name or IP address where you installed OBIEE.

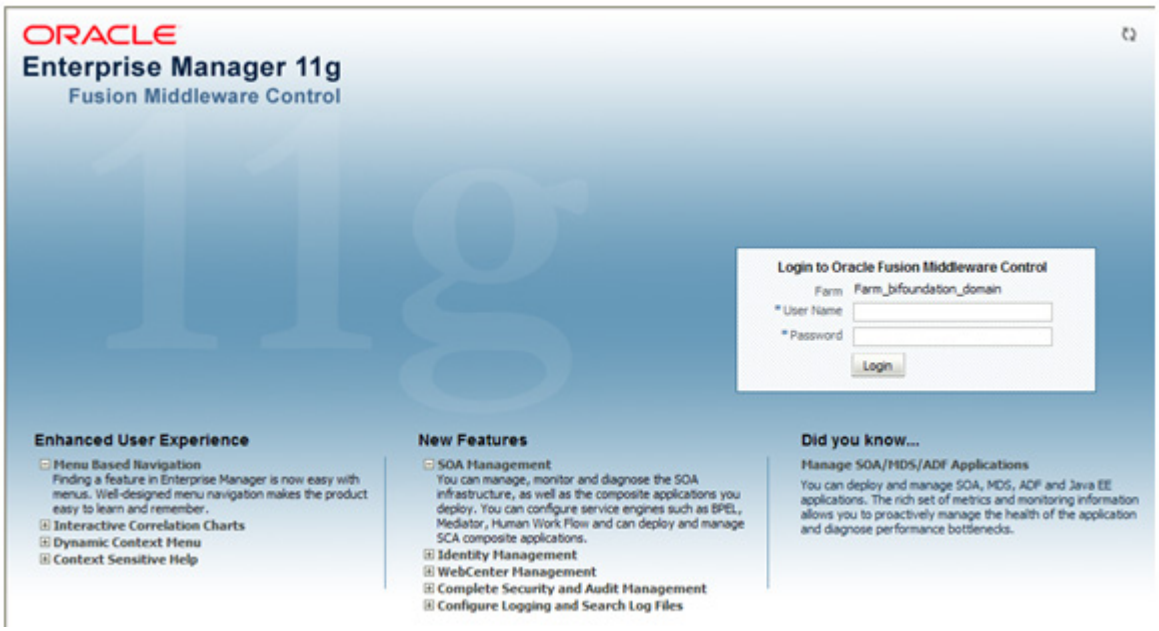

Figure 2: Enterprise Manager Login Screen

2. Log into Enterprise Manager using the administrator name and password that was specified during the OBIEE installation. The Oracle Fusion Middleware Control will open.

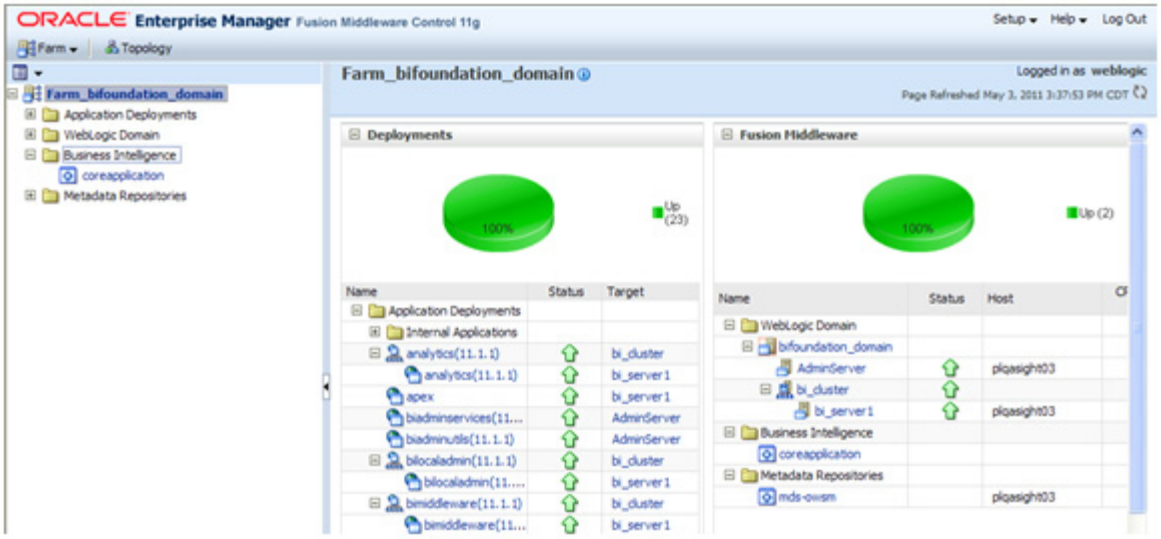

Figure 3: Oracle Fusion Middleware Control

OPENING THE ORACLE WEBLOGIC SERVER ADMINISTRATION CONSOLE

Open the WebLogic Server Administration Console using one of the following methods.

Method 1: Open the WebLogic Server Administration Console in Fusion Middleware Control

1. Launch the Enterprise Manager by entering the following URL in your browser:

   http://<hostname>:7001/em

Note In the above URL, <hostname> can be the server name or IP address where you installed OBIEE.

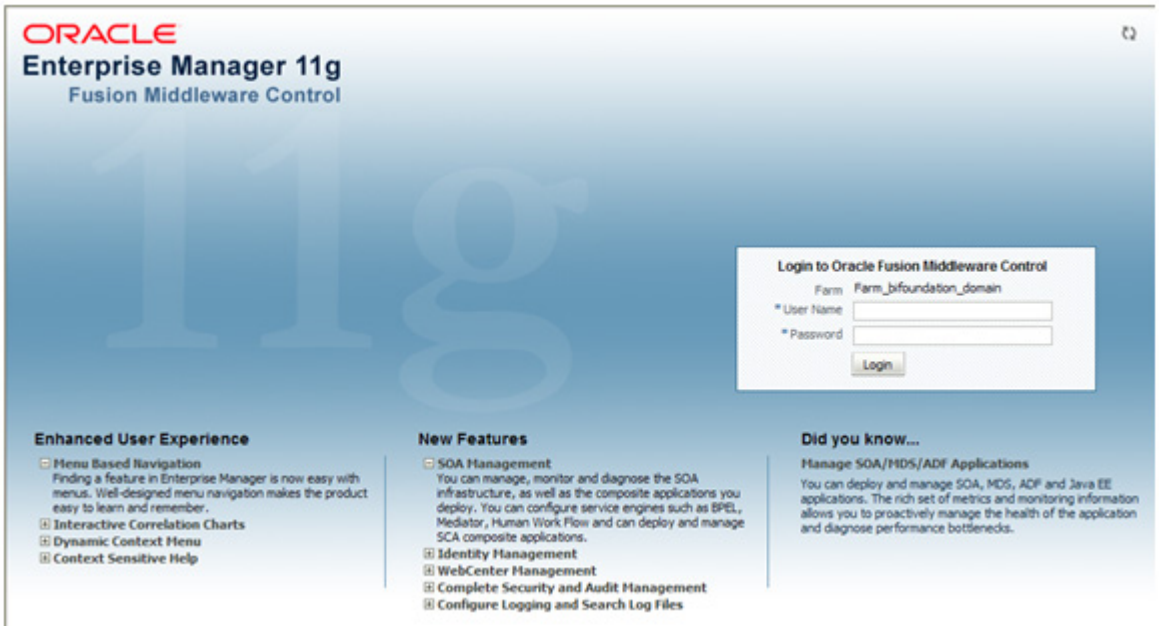

Figure 4: Enterprise Manager Login Screen

2. Log into Enterprise Manager using the administrator name and password that was specified during the OBIEE installation. The Oracle Fusion Middleware Console will open.

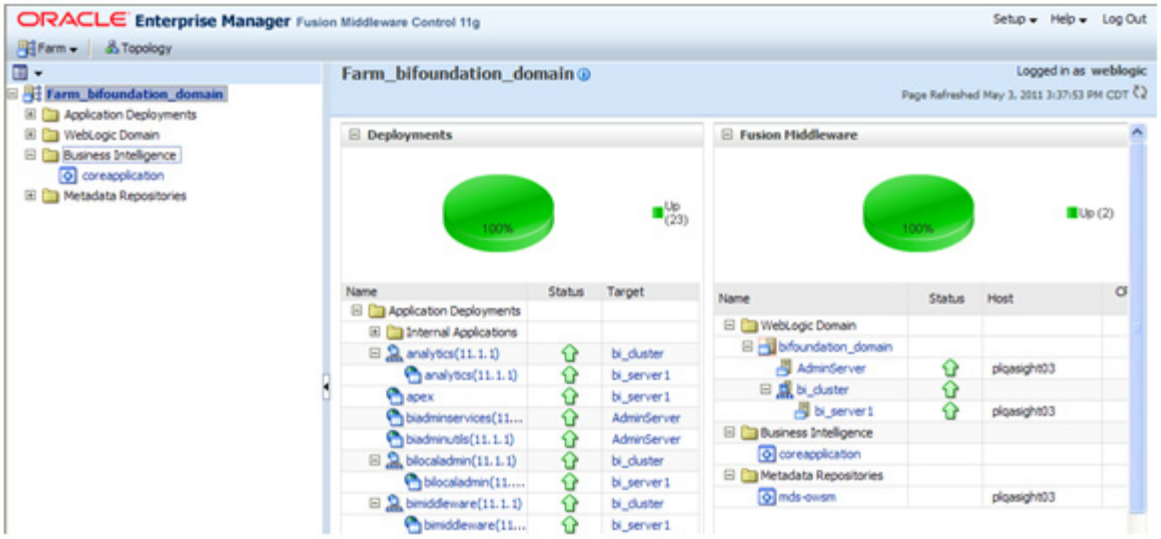

Figure 5: Oracle Fusion Middleware Console

3. In the navigation tree in the left pane expand the WebLogic Domain node and select the bifoundation_domain.
4. Click the **Oracle WebLogic Server Administration Console** link in the Summary region.
5. The Oracle WebLogic Server Administration Console login page is displayed.

Method 2: Using a URL

1. Launch WebLogic by entering the following URL in your browser:

   http://<hostname>:7001/console

Note	In the above URL, <hostname> can be the server name or IP address where you installed OBIEE.

The WebLogic Server Administration Console login screen will open:

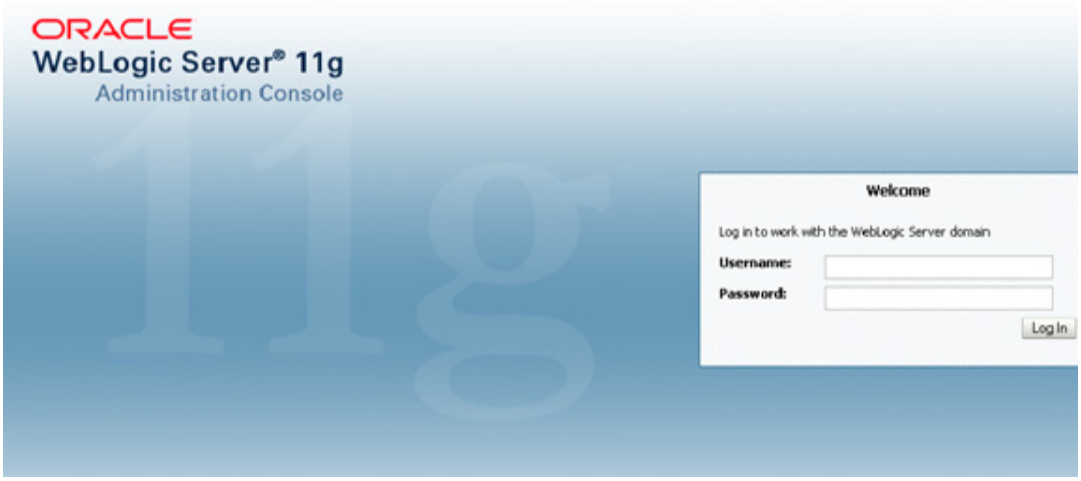

Figure 6: WebLogic Server Administration Console Login Screen

2. Enter the administrator user name and password for the server domain that was specified during the OBIEE installation process. The WebLogic Administration Console opens:

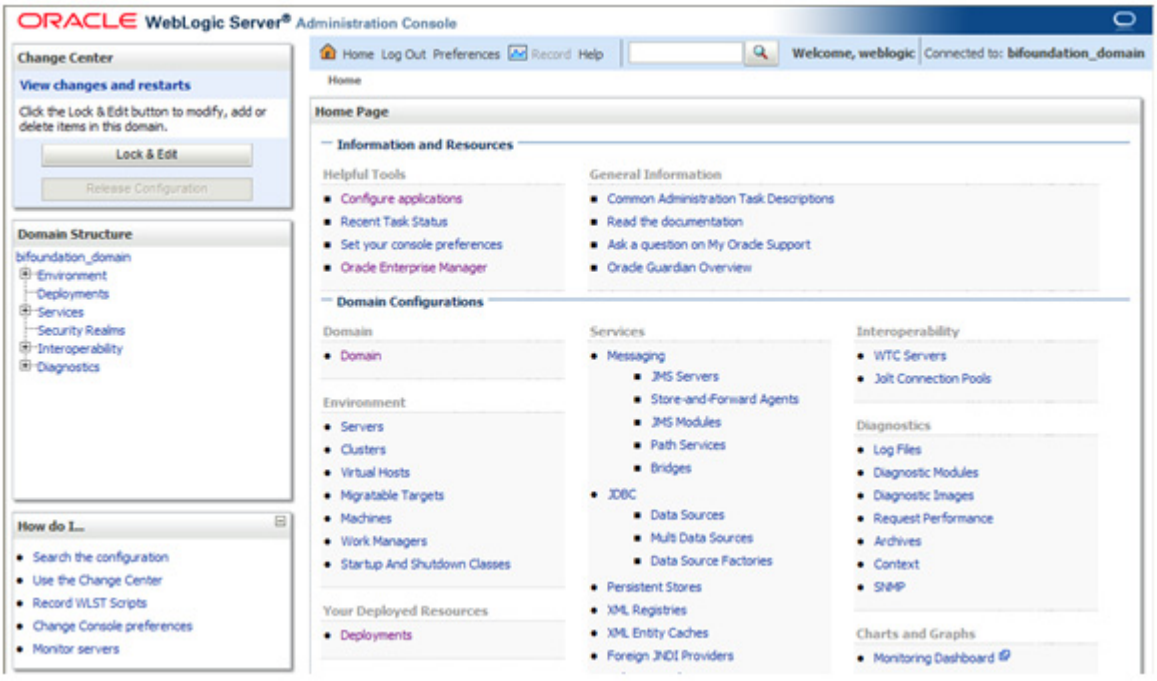

Figure 7: WebLogic Server Administration Console

WHAT'S NEXT?

Go to*Chapter 2: Creating and Configuring the OII Application Roles, Groups, and Users* for a step-by-step description on how to create all of the required OII application roles, users, and groups.

Chapter 2

Creating and Configuring the OII Application Roles, Groups, and Users

This chapter will walk you through the steps to configure the OII application roles, groups, and users:

1. Create the application roles for OII
2. Create the security groups for OII
3. Create the OII users
4. Add the OII users to the OII groups
5. Map the OII groups to the OII application roles
6. Map the OII application roles to BIConsumer and BIAuthor roles
7. Test the OII users in OBIEE

Step 1: Create the Application Roles for OII

This step requires you to create the following five application roles for OII using the Oracle Fusion Middleware Control:

- BIActuary
- BIClaimsManager
- BIExecutive
- BIProducer
- BIUnderwriter

1. Log into the Oracle Fusion Middleware Control (see *Opening the Oracle Fusion Middleware Control* on page 3).

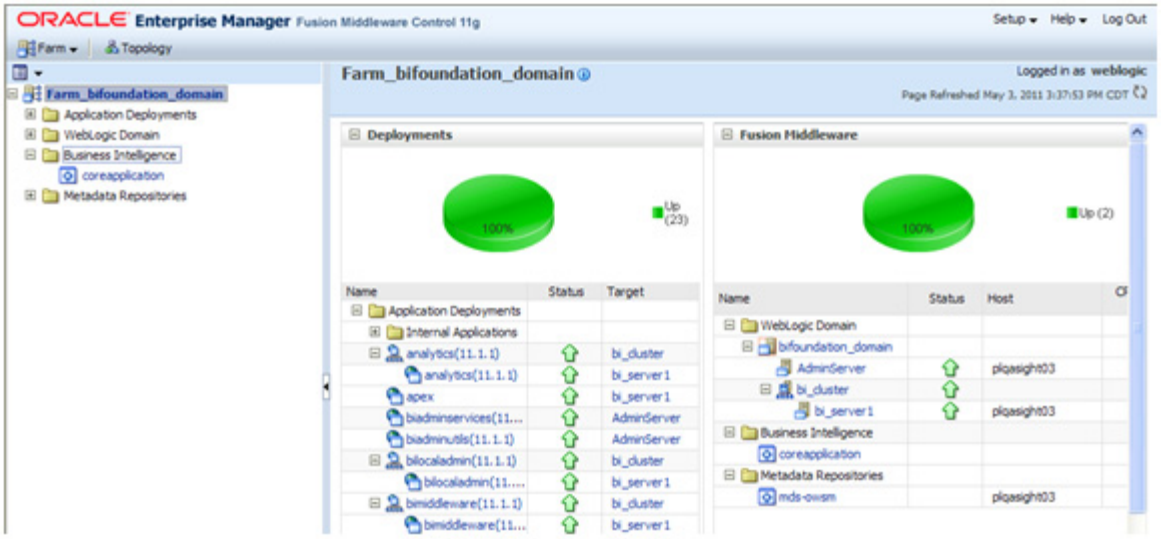

Figure 8: Oracle Fusion Middleware Control

2. In the navigation tree in the left pane expand **Business Intelligence** and select **coreapplication**. When the page refreshes, select the **Security** tab to open the **Security** page.

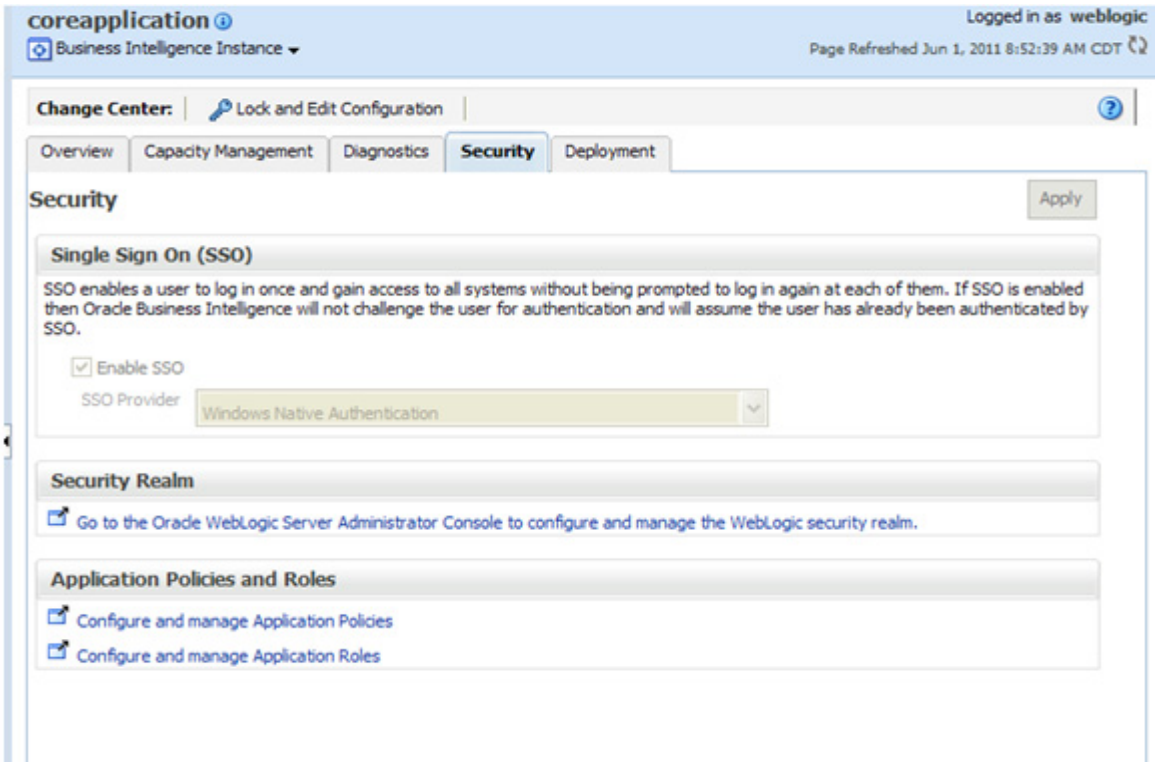

Figure 9: Security Page

3. Click on the **Configure and manage Application Roles** link at the bottom of the page. The **Application Roles** page will open. What you will initially see on this page is a list of the default security roles that are shipped with OBIEE.

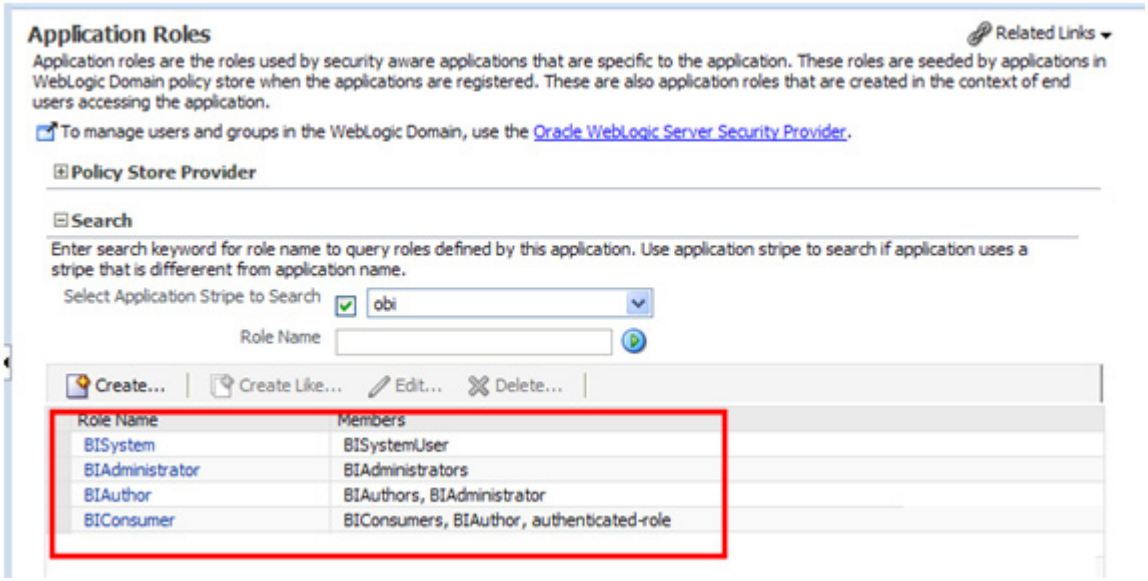

Figure 10: Application Roles

4. On the **Application Roles** page, click the **Create** button. The **Create Application Roles** page opens.

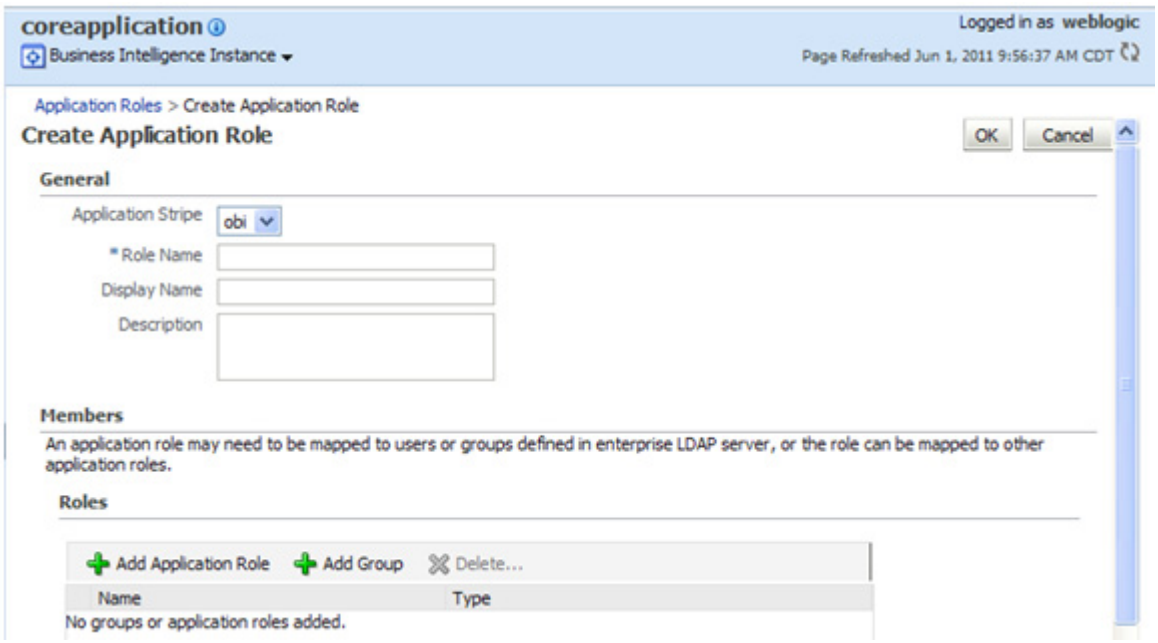

Figure 11: Create Application Roles Page

5. Enter the following parameters under the **General** section:
   - **Role Name** - Enter the name of one of the OII application roles listed on page 13. For example, **BIActuary**.
   - (Optional) **Display Name** - Enter the display name for the application role.
   - (Optional) **Description** - Enter a description for the application tole.
6. Click **OK** to return to the Application Roles page. The application role you just created will appear in the table.
7. Repeat steps 5-7 to create the four remaining OII application roles.
   - BIClaimsManager
   - BIExecutive
   - BIProducer
   - BIUnderwriter

When you are finished the OII application roles will appear in the table on the Application Roles page:

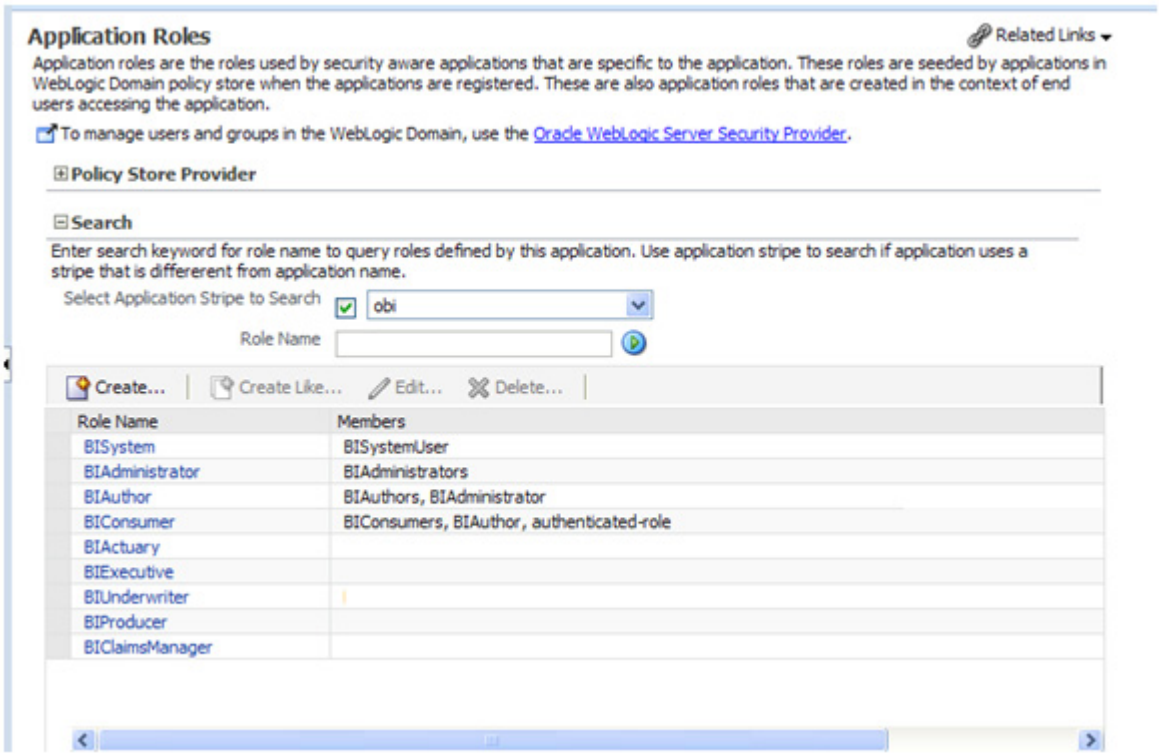

Figure 12: OII Application Roles

STEP 2: CREATE THE SECURITY GROUPS FOR OII

This step requires you to create the following OII Security Groups within the **Oracle WebLogic Server Administration Console.**

- BIActuaries
- BIClaimsManagers
- BIExecutives
- BIProducers
- BIUnderwriters

Note In OBIEE, groups are set to match the corresponding application roles but with their names set as plural. For example, BIProducers (group) vs. BIProducer (application role).

1. Open the **Oracle WebLogic Server Administration Console** (see *Opening the Oracle WebLogic Server Administration Console* on page 5).:

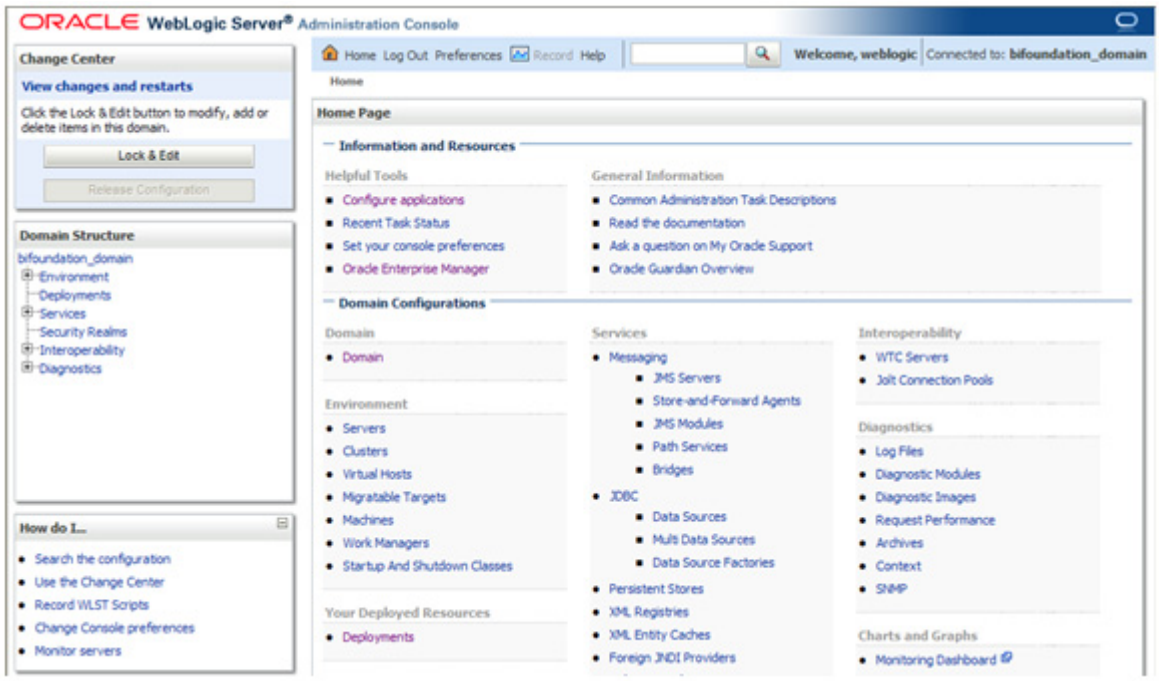

Figure 13: WebLogic Server Administration Console

2. Select **Security Realms** in the left pane. The **Summary of Security Realms** page will appear on the right.

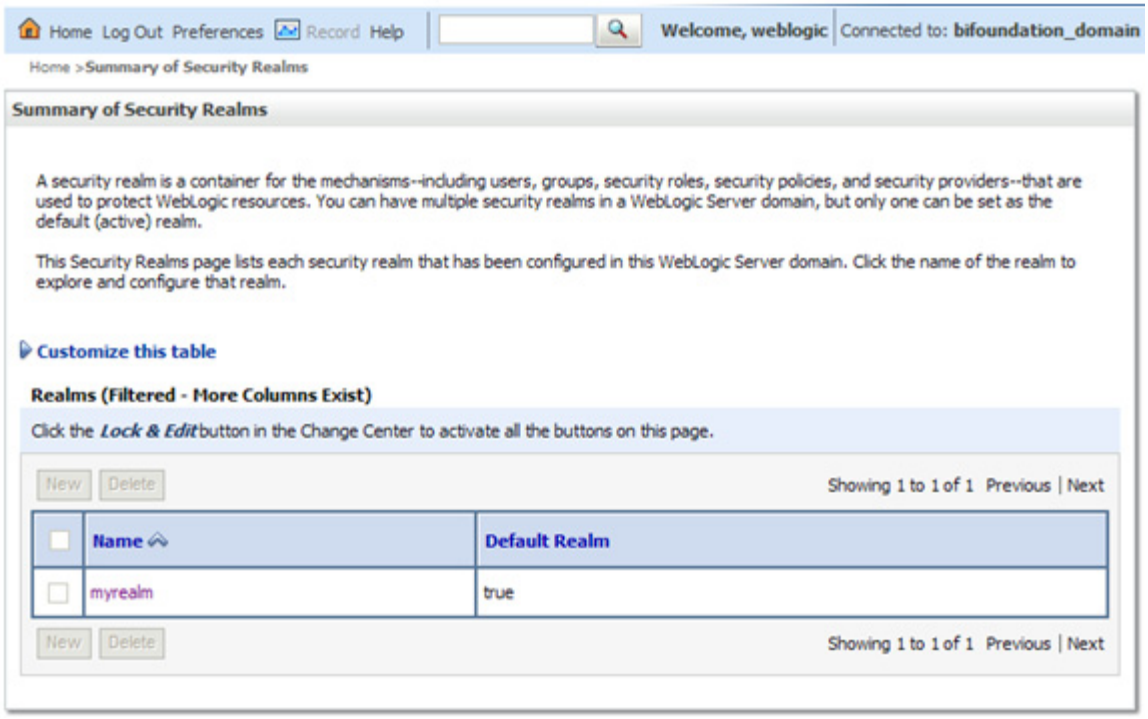

Figure 14: Summary of Security Realms Page

3. Click on **myrealm**. The **Settings for myrealm** page will open.

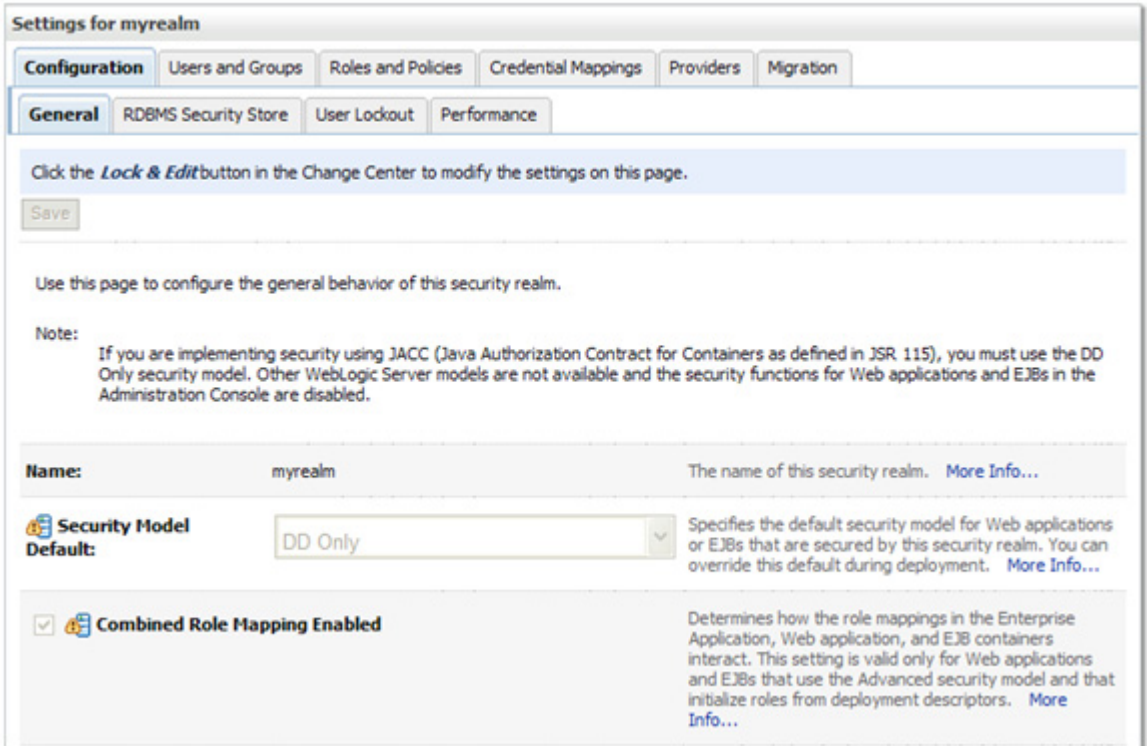

Figure 15: Settings for myrealm Page

4. Click on the **Users and Groups** tab at the top of the page, and then click on the **Groups** tab to display a list of configured groups in **myrealm**.

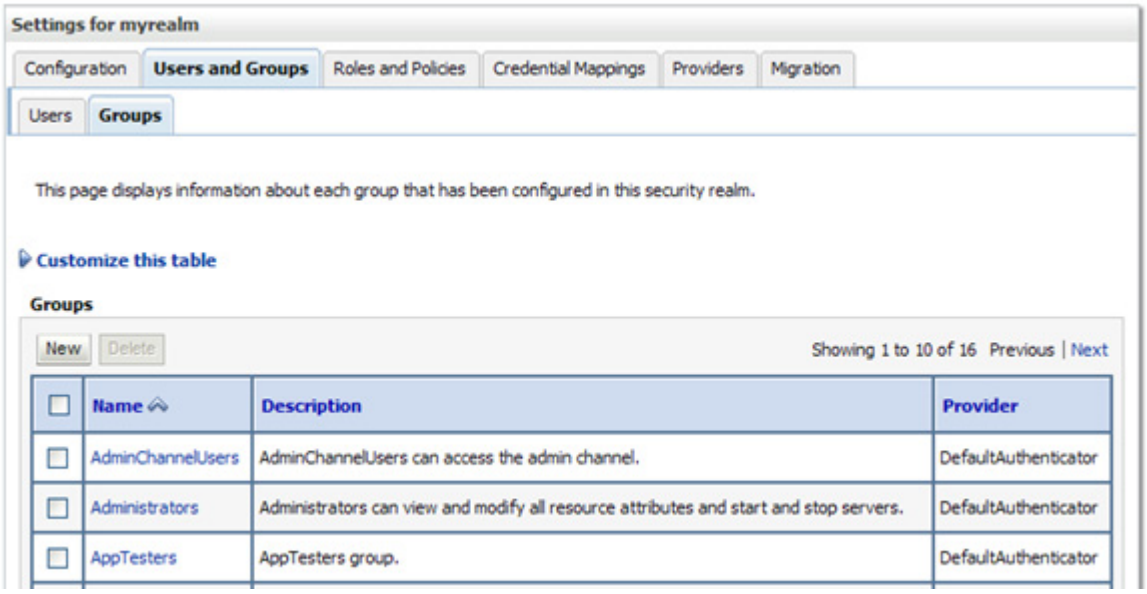

Figure 16: List of Configured Groups

5. Select the **New** button. The **Create a New Group** page will open.

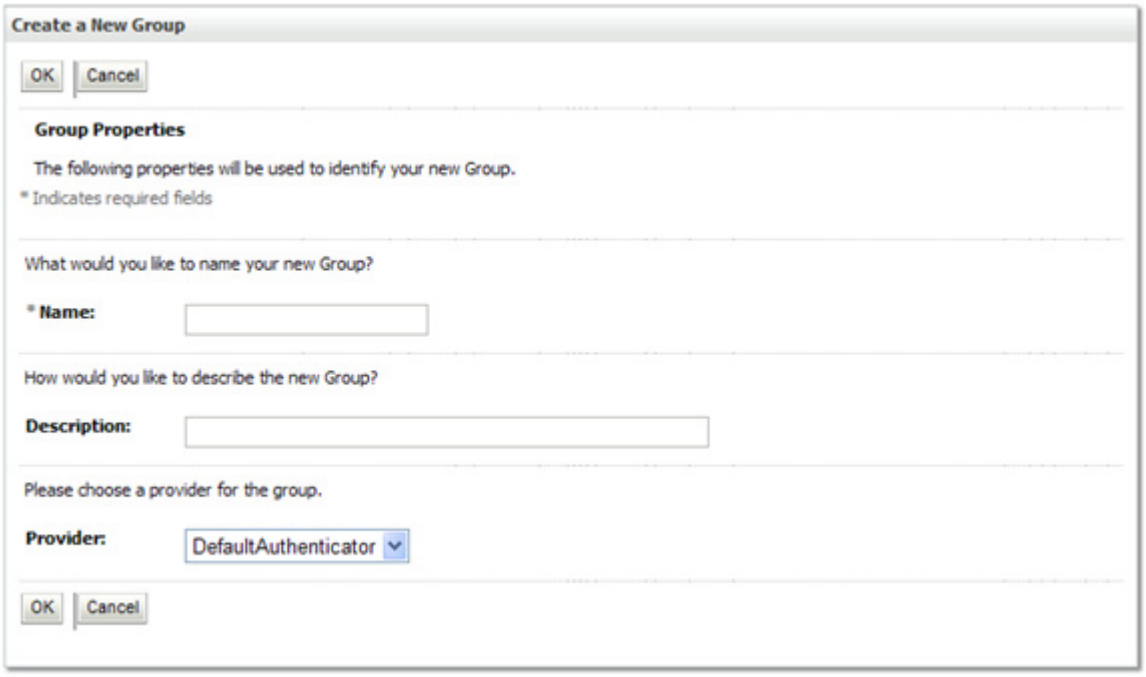

Figure 17: Create a New Group Page

6. Enter the following information on this page:

   - **Name** - Enter the name of a of the OII security groups listed on page 17. For example, **BIActuaries**.

- **(Optional) Description** - Enter a description
- **Provider** - Accept the default provider: **DefaultAuthenticator**.

7. Click **OK**. You will be returned to the Groups tab where the group you just created will appear in the list of groups.

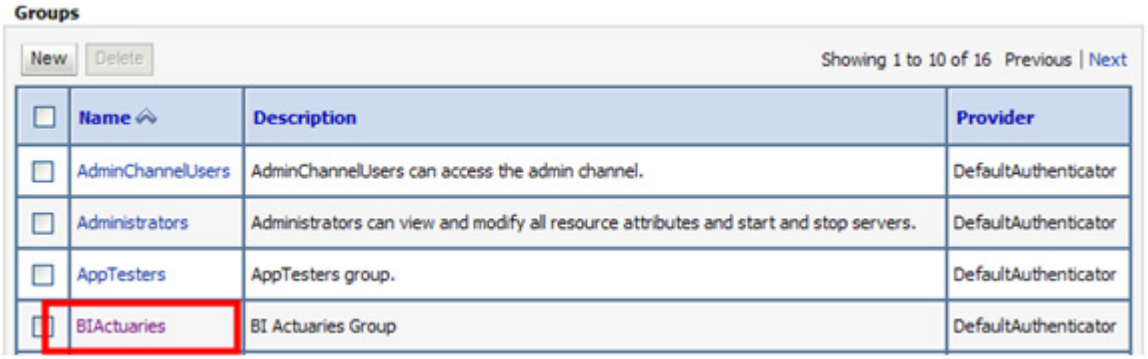

Figure 18: The BIActuaries Group has been Completed

8. Repeat steps 5-7 to create the remaining OII groups:
   - BIClaimsManagers
   - BIExecutives
   - BIProducers
   - BIUnderwriters

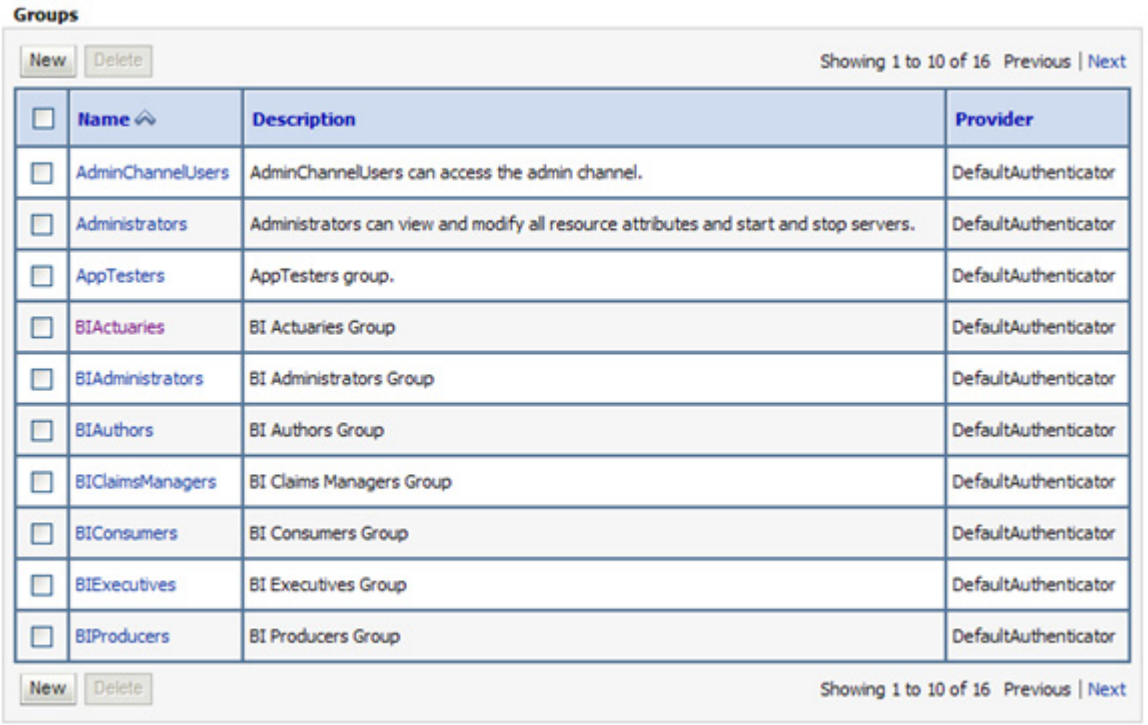

Figure 19: Create the Rest of the OII Groups

STEP 3: CREATE THE OII USERS

This step requires you to create the OII users who will be logging into OBIEE.

For the purpose of testing OBIEE, this scenario will require you to create five separate users, one for each OII application role. These sample user names will be:

- actuary
- claims
- executive
- producer
- underwriter

In the subsequent steps we will then add each user to its corresponding OII group and in turn map the OII group to its corresponding OII application role.

1. Select the **Users** tab at the top of the page to display the list of configured users.

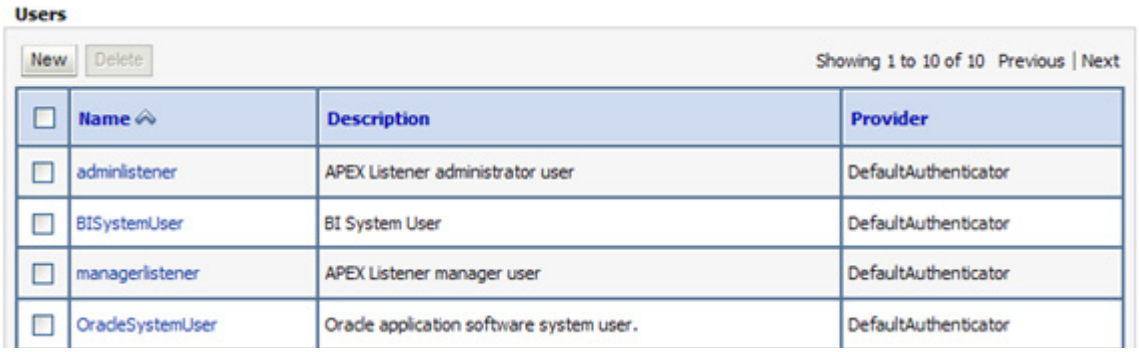

Figure 20: List of Users

2. Click on the **New** button at the top of this table. The **Create a New User Page** opens.

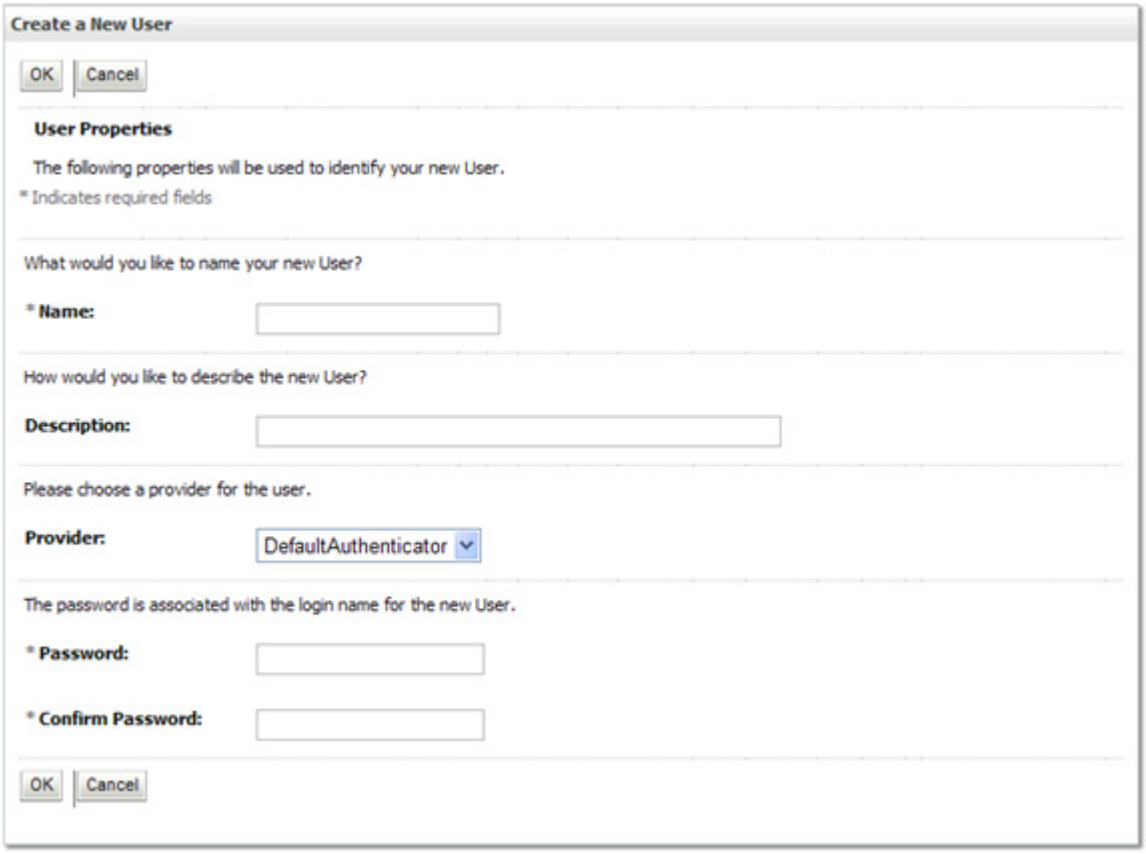

Figure 21: Create a New User Page

3. Enter the following information on this page:
   - **Name** - Enter a name of the OII user. For example, **actuary.**
   - **(Optional) Description** - Enter a description
   - **Provider** - Accept the default provider: **DefaultAuthenticator**.
   - **Password** - Enter a password that is at least 8 characters long.
   - **Confirm Password** - Re-enter the password.
4. Click **OK**. You will be returned to the **Users** tab where the user you just created will appear in the list of users.

5. Repeat steps 1-4 to add the four additional users.

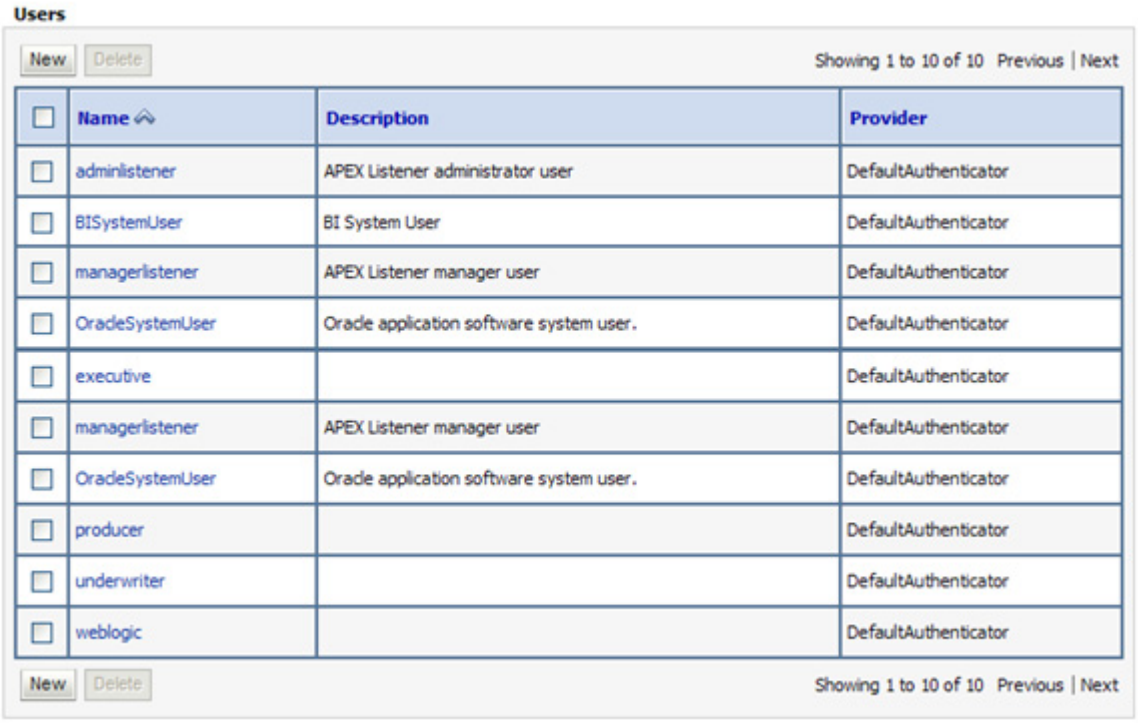

Figure 22: OII Users Added to the List

STEP 4: ADD USERS TO THE OII GROUPS

This step requires you to add the users you created in the previous section to their corresponding OII group.

User	Add to...	Group
actuary		BIActuaries
claims		BIClaimsManagers
executive		BIExecutives
producer		BIProducers
underwriter		BIUnderwriters

1. If you are not already there, return to the **Users** page to display the table listing the configured users.

2. Click on the name of an OII user. For example, **actuary**. A settings page for the selected user will open.

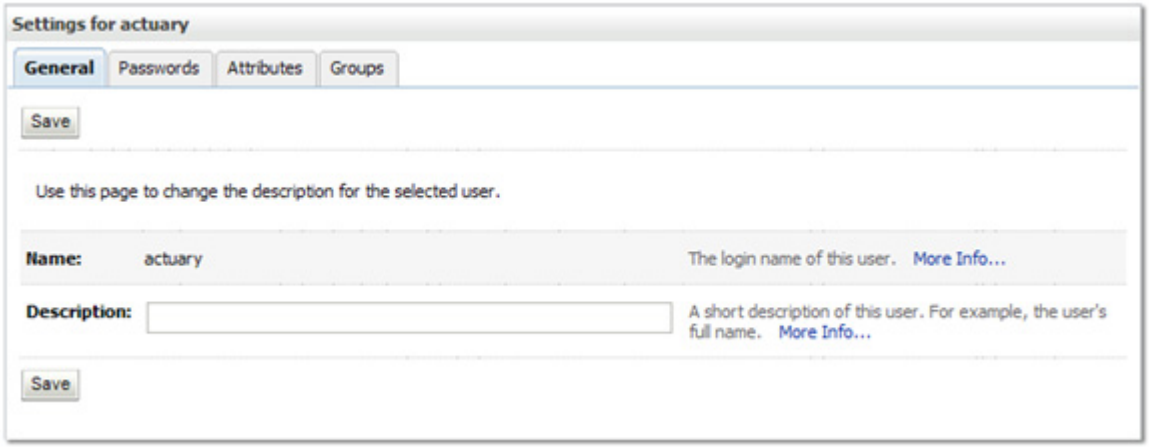

Figure 23: Settings Page for the Selected User

3. Select the **Groups** tab. The **Groups** page opens:

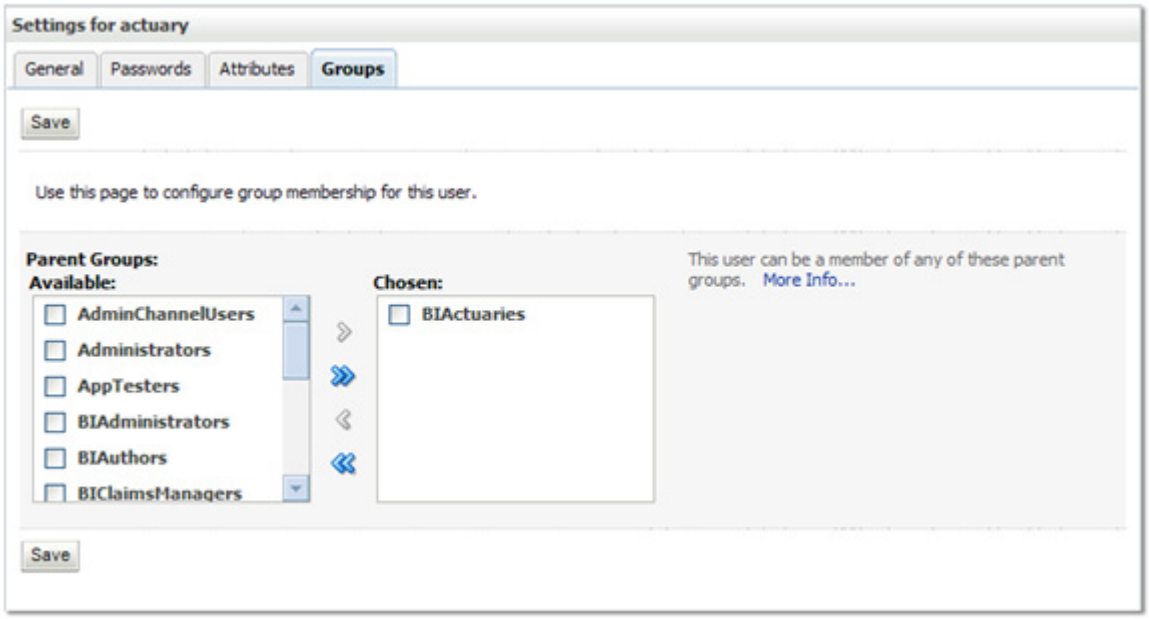

Figure 24: Groups Page

4. Add the **actuary** user to the **BIActuaries** group by selecting **BIActuaries** in the **Available** list box. The selected group will appear in the **Chosen** list.
5. Click the **Save** button.
6. Repeat steps 2-5 to add the remaining four users to their appropriate OII group.
7. Recycle WebLogic to apply your changes.

STEP 5: MAP OII GROUPS TO OII APPLICATION ROLES

This step requires you to map the following OII groups to their corresponding OII application roles.

Group	Map to...	Application Role
BIActuaries		BIActuary
BIClaimsManagers		BIClaimsManager
BIExecutives		BIExecutive
BIProducers		BIProducer
BIUnderwriters		BIUnderwriter

1. Return to the Oracle Fusion Middleware Control (see *Opening the Oracle Fusion Middleware Control* on page 3).
2. In the navigation tree in the left pane expand **Business Intelligence** and select **coreapplication**.
3. When the page refreshes, select the **Security** tab to open the **Security** page.

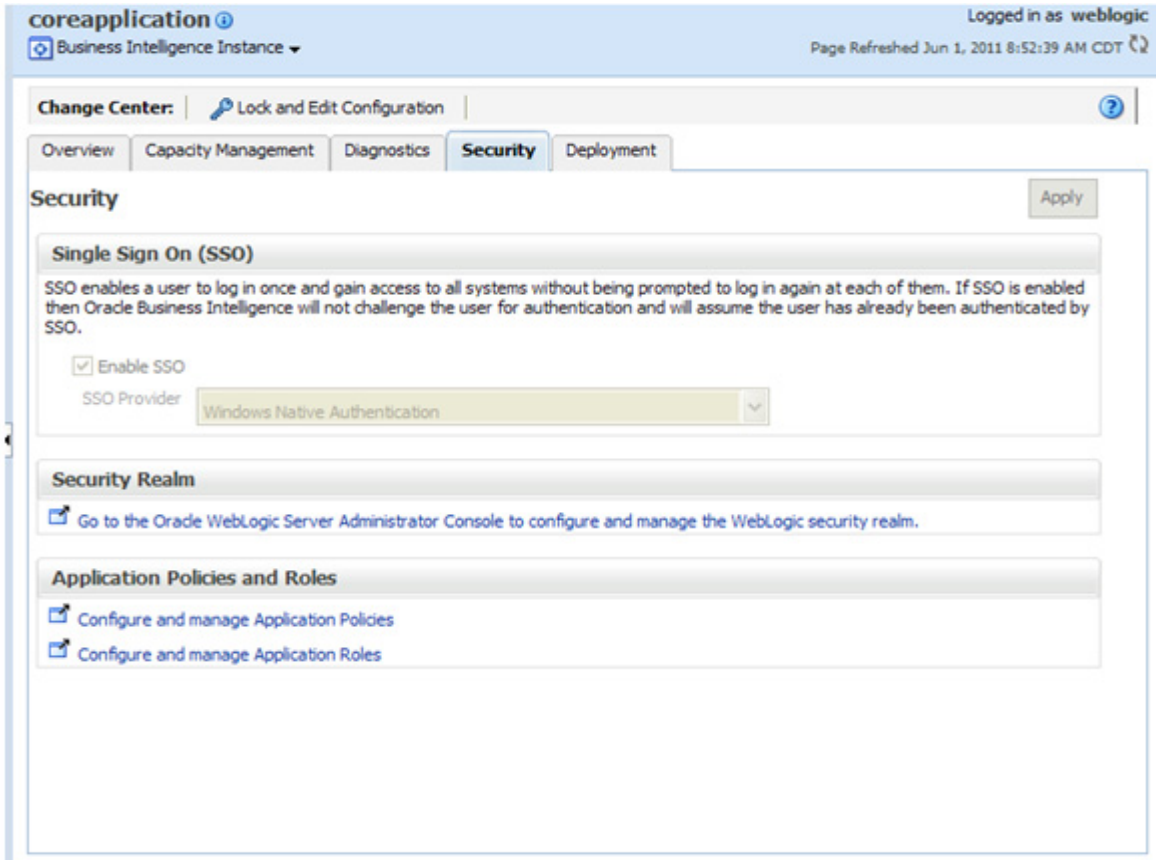

Figure 25: Security Page

4. Click on the **Configure and manage Application Roles** link at the bottom of the page. The **Application Roles** page will open.

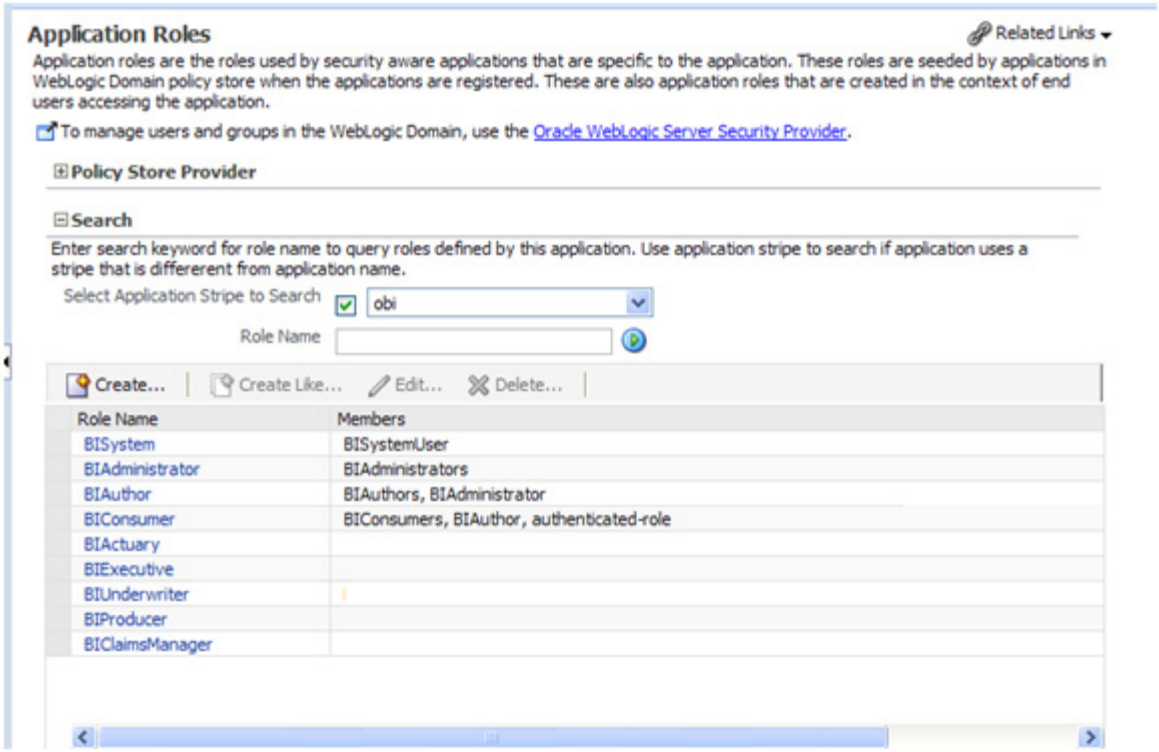

Figure 26: Application Roles Page

5. Click on **BIActuary.** The **Edit Application Role** page for **BIActuary** opens.

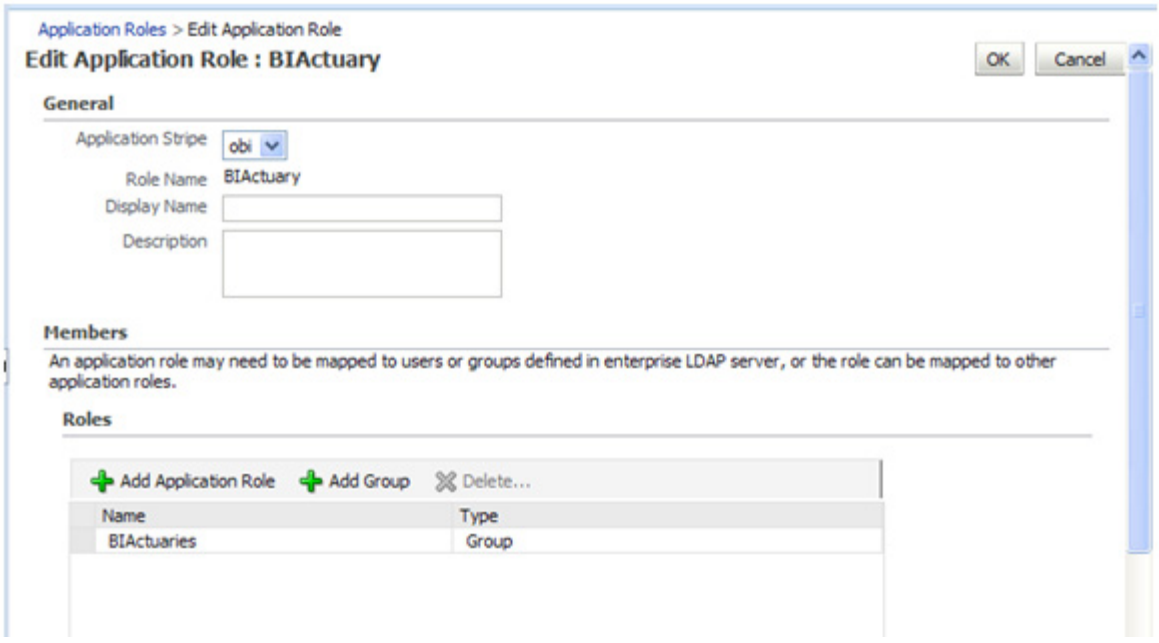

Figure 27: Edit Application Role

6. Select the **Add Group** button to add the **BIActuaries** group to the Roles list.

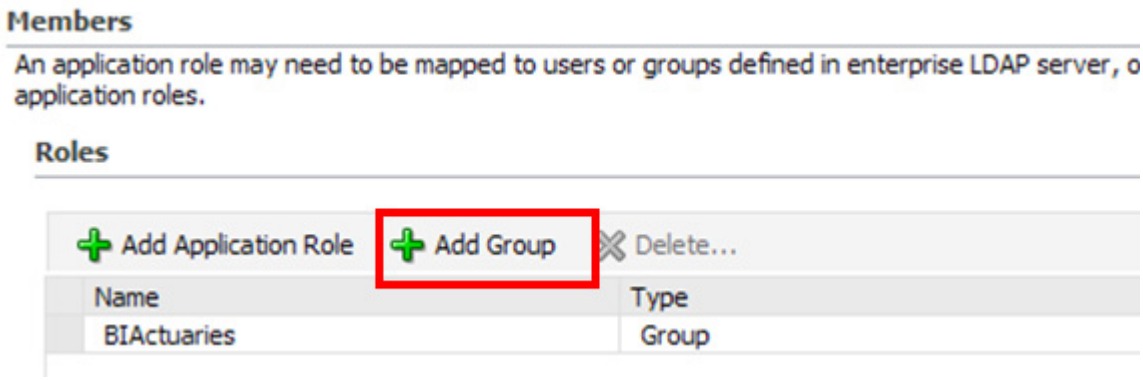

Figure 28: Add Group Button

7. Click **OK** to return to the **Application Roles** page. The **BIActuaries** group is now mapped to the **BIActuary** role.

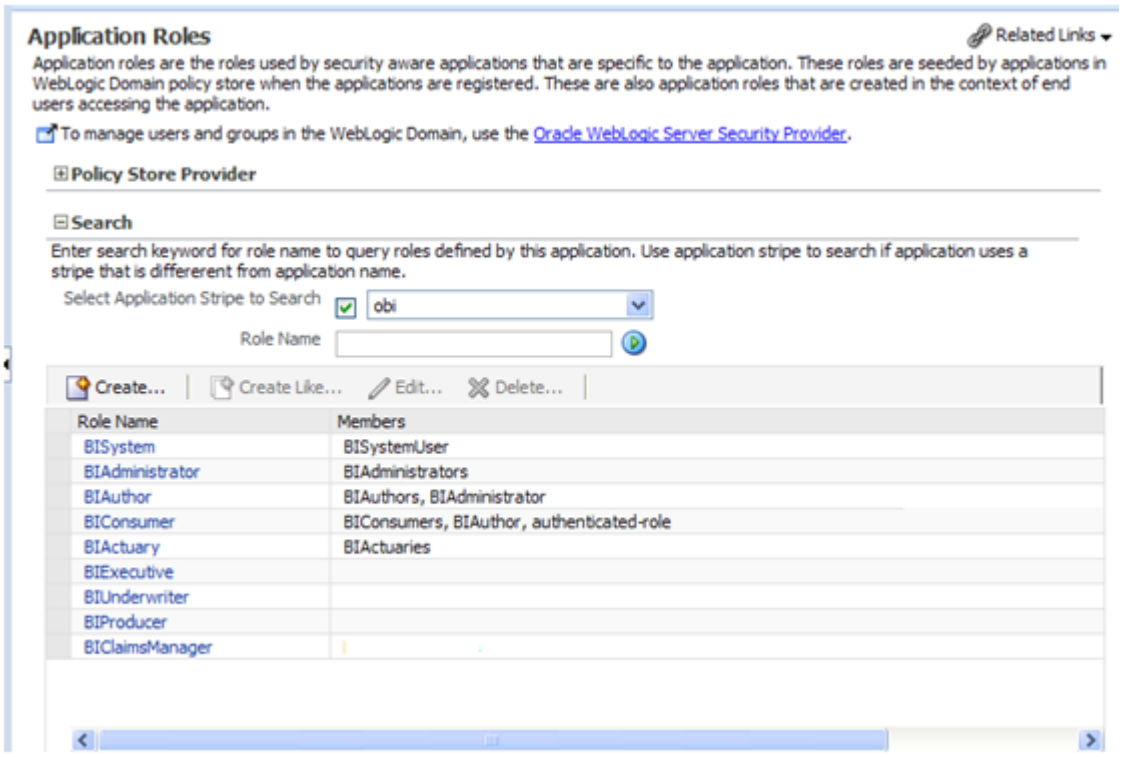

Figure 29: BIActuaries Group is Mapped to BIActuary Application Role

8. Repeat steps 5-7 to map the remaining OII groups to the corresponding OII application roles. When you are done the Application Roles page will appear as follows:

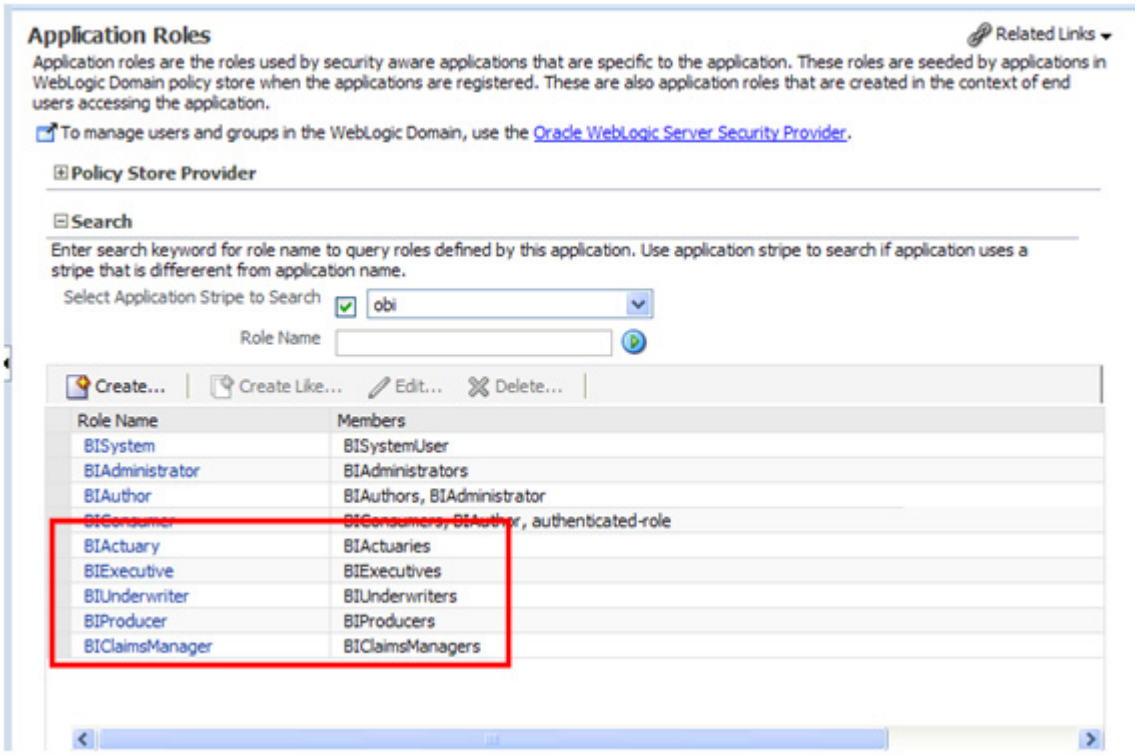

Figure 30: OII Groups Mapped to OII Application Role

STEP 6: MAP THE OII APPLICATION ROLES TO THE BICONSUMER AND BIAUTHOR APPLICATION ROLES

This step requires you to map all of the OII application roles that you previously created to the **BIAuthor** and **BIConsumer** application roles. BIAuthor and BIConsumers are pre-configured application roles that are installed with OBIEE.

1. On the **Application Roles** page, click on the **BIAuthor** application role to open it for editing.
2. Use the **Add Application Role** button to map the OII application roles to **BIAuthor.**

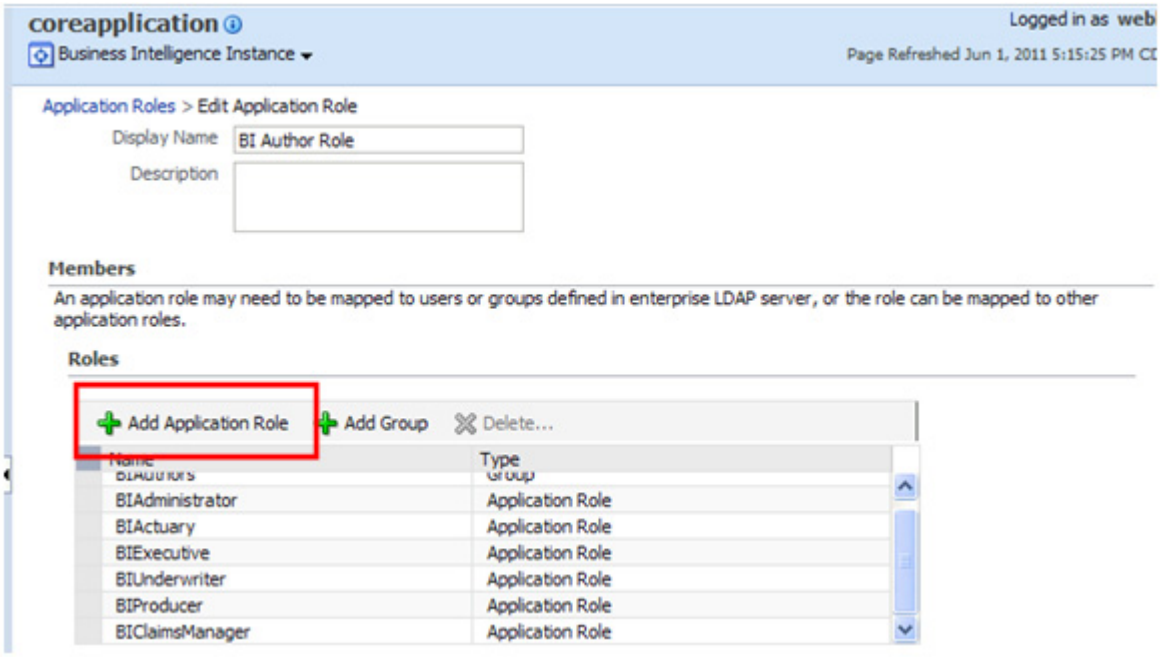

Figure 31: Add OII Application Roles to BIAuthor

3. Click **OK** to return to the **Application Roles** page.
4. Repeat steps 1-3 to map the OII application roles to the **BIConsumer** application role.

5. When you are finished the **Application Roles** page will appear as follows.

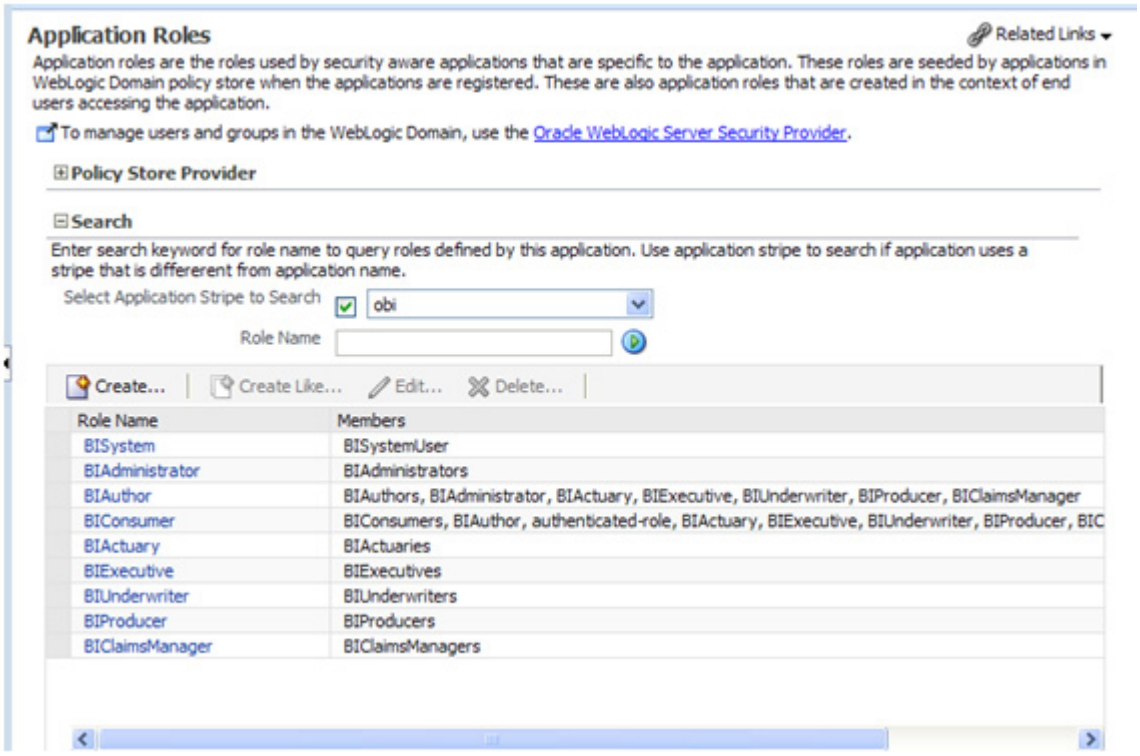

Figure 32: OII Application Roles Mapped to BIAuthors and BIConsumers Application Roles

6. In the navigation tree in the left pane expand **Business Intelligence** and select **coreapplication**.
7. When the page refreshes, select the **Capacity Management** tab to open the **Capacity Management** page.

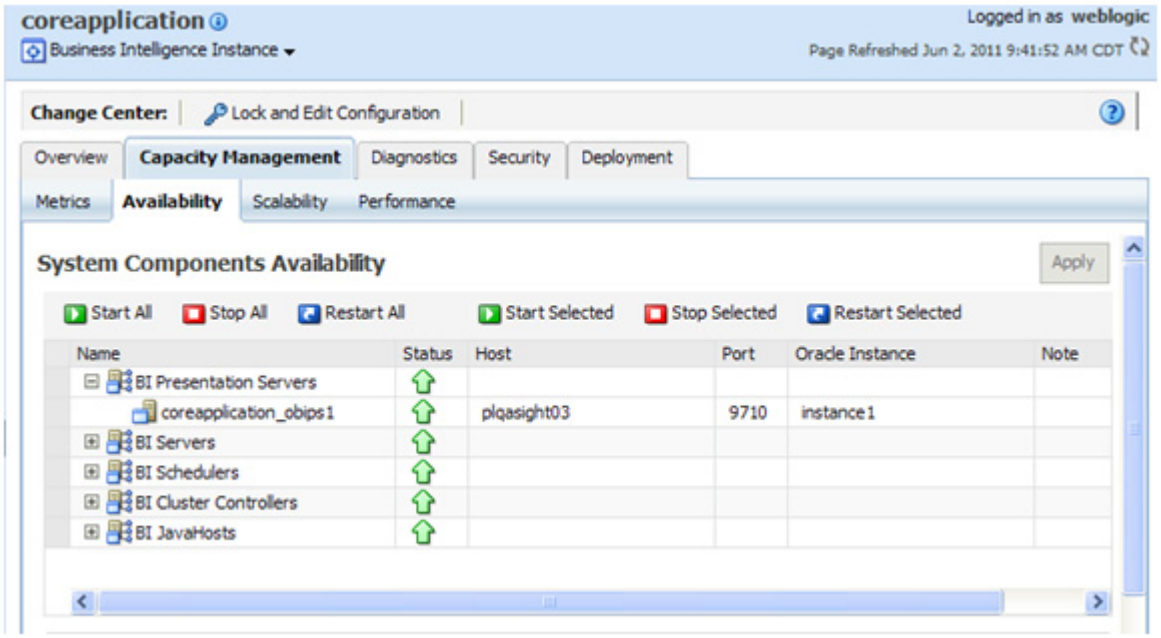

Figure 33: Select "Restart All" Button

8. Select **Restart All** to restart all the services and apply your changes.

STEP 7: TEST THE OII USERS IN OBIEE

This step requires you to log into OBIEE using the five user accounts that you created and configured in the previous steps.

1. Open a new browser window and enter the following URL:

   `http://<hostname>:<port>/analytics`

Note In the above URL:

- **<hostname>** - is the server name or IP address where you installed OBIEE
- **<port>** - is the port assigned to OBIEE. The default port will be different depending on whether or not you selected a "Simple" or "Enterprise" Install for OBIEE.
  - **Simple Install** - the default port is 7001.
  - **Enterprise Install** - the default port is 9704 but the user has the option to specify ports during the installation.

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2. A login screen for OBIEE will appear.

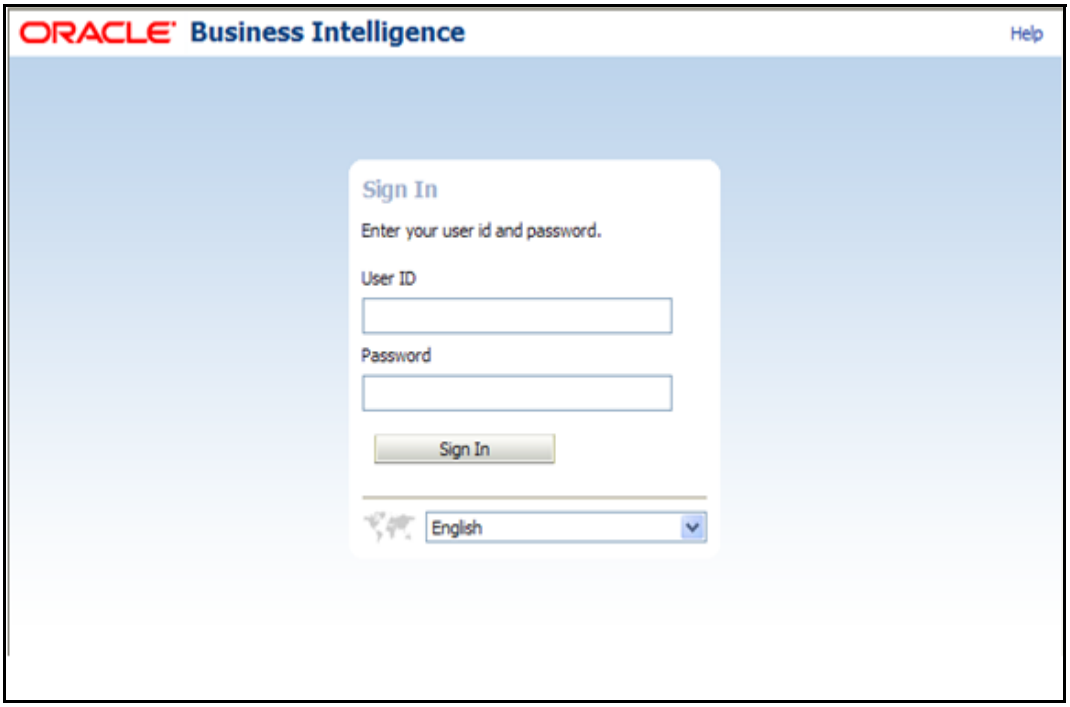

Figure 34: Oracle Business Intelligence Login Screen

3. Login separately as the test user for each of the OII groups you created.

Viewing the Content within OBIEE

Once you are logged into OBIEE, only the data for the role that was assigned to that particular user is displayed in the dashboards. For example, the **executive** user will only display the contents associated with the **executive** role. The Analysis reports listed in the Analysis Dashboard are directly related to the role(s) of the current user as well as the selected Line of Business and Corporate mart. Note that since only one role is associated with the user there are no tabs along the top of the page.

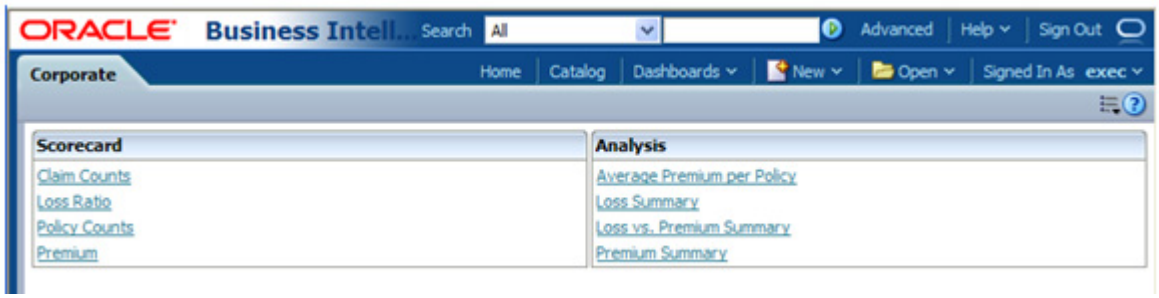

Figure 35: Executive User (Corporate)

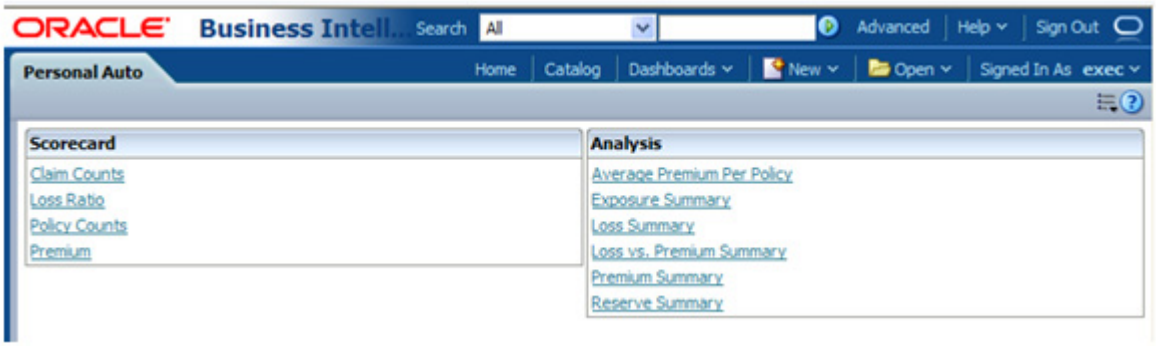

Figure 36: Executive User (Personal User)

Corporate

Corporate has the following four Analysis Dashboard reports assigned across the five OII roles:

Table 1: Corporate - Analysis Dashboard Reports by Role

Report	Actuary	Claims Management	Executive	Production	Underwriting
Average Premium per Policy	X		X		X
Loss Summary	X	X	X		X
Loss vs. Premium Summary	X		X		X
Premium Summary	X		X		X

Lines of Business

The Lines of Business have the following Analysis Dashboard reports assigned across these roles:

Table 2: Line of Business - Analysis Dashboard Reports by Role

Report	Actuary	Claims Management	Executive	Production	Underwriting
Average Premium per Policy	X		X		X
Claims Summary		X			
Exposure Summary	X	X	X		X
Loss Summary	X	X	X		X
Loss Triangulation	X	X			
Loss vs. Premium Summary	X		X		X
Premium Summary	X		X		X
Reserve Summary	X	X	X		

ADDING ADDITIONAL USERS

Now that you have successfully created and mapped the OII application roles and groups, you can add others OII users by following the instructions outlined in *Step 3: Create the OII Users* on page 21.

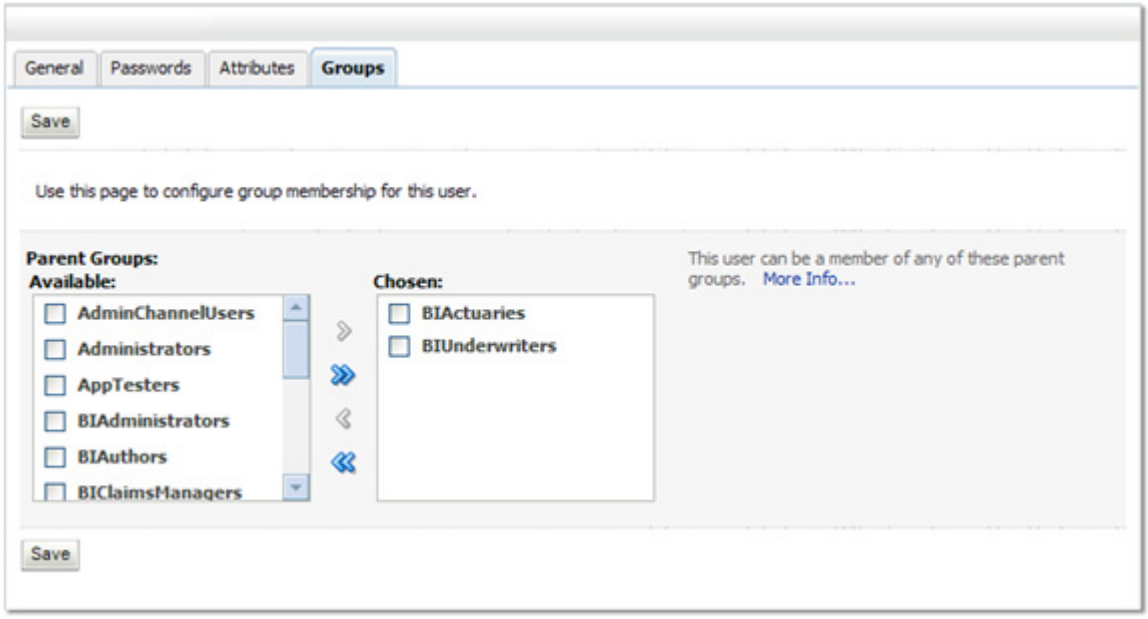

Figure 37: Add User to Multiple OII Groups.

Users can be assigned to multiple groups as required and inherit the roles that are assigned to those groups to determine the content available to them within OBIEE.

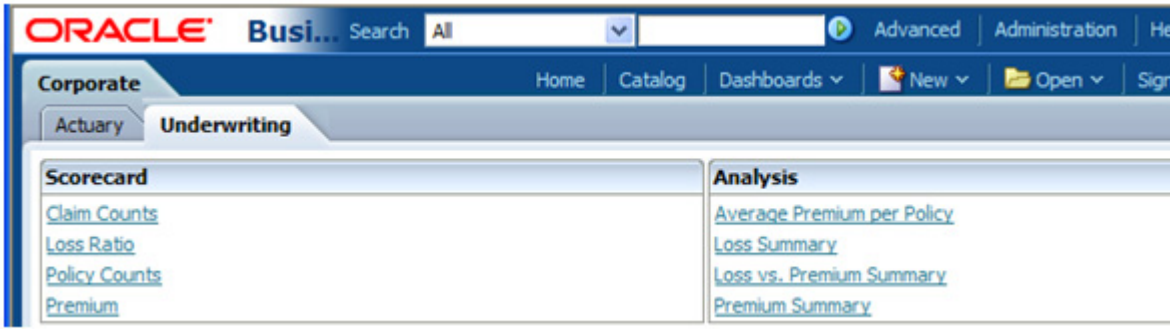

Figure 38: User Assigned to Actuary and Underwriting Role

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