

Installation Manual  
Oracle Insurance Solvency II Analytics  
Version 2.0.0.0.0  
August 2013



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## 1. About this Manual

### 1.1 Oracle Financial Services Analytical Applications Infrastructure Overview

Oracle Financial Services Analytical Application Infrastructure (OFSAAI) is an analytical application platform which has been architected to be multi-tiered and open-systems compliant. OFSAAI is fully web-enabled. It's a 100% thin-client, browser-based interface with zero foot print which dramatically reduces the cost of application deployment. All OFSAAI processes, including those related to business, are metadata-driven, thereby providing a high degree of operational and usage flexibility, and a single consistent view of information to all users.

OFSAAI product suite includes a rules-framework designer engine, Unified Metadata Manager which has a semantic layer of metadata abstraction that is common over both relational and OLAP repositories.

### 1.2 Oracle Solvency II Analytics version 2.0.0.0.0 Overview

This release deals with various existing reports and additional new reports to provide compliance with the Pillar II and Pillar III regulatory requirements of the Solvency II namely ORSA and SFCR and RSR. Numerous technical enhancements like usage of time hierarchy offering flexibility to end user to change time period, provision to update comments for each report, time slider for quick access etc have been incorporated as well.

Oracle Solvency II Analytics is supported with OIDF reporting data model which is simultaneously interfaced with QMR version 2.0.0.0.0. This facilitates the end user to have single view of regulatory reports data to be consumed by QMR and Oracle Insurance Solvency II analytics v2.0.0.0.0.

### 1.3 Scope

This manual provides a step-wise instruction to install the Oracle Insurance Solvency II Analytics Version 2.0.0.0.0 on Oracle 11g R2 (11.2.0.2.0) or to install Oracle Insurance Solvency II Analytics Version 2.0.0.0.0 where Oracle Financial Services Analytical Applications Infrastructure is already hosted in Oracle 11g R2 (11.2.0.2.0) environment.

### 1.4 Organization of the Manual

The Installation Manual is organized into the following chapters:

- Prerequisites section identifies the hardware and base software environment that is required for successful installation and functioning of Oracle Insurance Solvency II Analytics Version 2.0.0.0.0.
- Installing the Application section details the pre-installation activities followed by a step-by-step instruction on the various installation options.
- Post Installation Activities section details the steps that should be performed after the

successful installation of the Oracle Insurance Solvency II Analytics Version 2.0.0.0.0.

## 1.5 Conventions Used in this Manual

- References to sections or chapters in the manual are displayed in *Italics*.
- Screen names are displayed in the following manner:

### ***Introduction screen***

- Options and buttons are displayed in **Bold**.
- Notes are displayed as follows:

#### **Note:**

It is important that the password should be 6 characters long. If you do not adhere to this pre-requisite, you will see a system message that reads **Password must be at least 6 characters long**.

## 2. Prerequisites

### 2.1 Environment

Installation of Oracle Insurance Solvency II Analytics Version 2.0.0.0.0 Product requires the Oracle 11g R2 (11.2.0.2.0) version, to be installed. **Oracle Insurance Solvency II Analytics** works in a standalone environment. Ensure OBIEE 11.1.1.6.10 on any supported operating system is configured after installation. **Oracle Insurance Solvency II Analytics** also works in cases where **Oracle Insurance Solvency II Analytics** is available on Oracle Financial Services Analytical Applications Infrastructure v7.3.2.2.0. In such a case, the installation process requires certain environmental variables to be set prior to starting the installation. Ensure that these requirements are met before starting the installation. Refer to the Release Notes for the latest updates on hardware or software requirements and the OFSAAI Installation Manual for the environment variables.

### 2.2 Front-End Access

- Internet Explorer 8.0/9.0
- Java Plug-in 1.6.0\_25
- Acrobat Reader 8.0
- The screen resolutions supported are 1024\*768 and 1280\*1024

#### **NOTE:**

Ensure that Java Plug-in is enabled in the browser settings.

### 3. Installing the Analytical Application

#### 3.1 Installing Oracle Insurance Solvency II Analytics Version 2.0.0.0.0 Product

##### Pre-installation Activities

The following is the Pre-installation checklist to ensure the readiness to start installing Oracle Insurance Solvency II Analytics Product:

- Oracle Financial Services Analytical Applications Infrastructure v7.3.2.2.0 must be successfully installed on Oracle 11gR2 (RAC) (11.2.0.2.0) if standalone installation is not preferred.
- If Infrastructure installation is on a multitier environment, then execute the following commands in the DB Layer terminal
  - `chmod -R 777 <ftpshare folder>`
- Navigate to ftpshare folder and set the *umask* shown as follows, to ensure that the new files created will have 666 file permission.
  - `cd <ftpshare folder>`
  - `umask 0000`
- The Config and atomic schema should be two distinct oracle database users.
- The Information Domain schema makes use of the tables from the configuration schema. To create a new information domain, execute the file **<Infrastructure Database Layer Install Directory>/config\_table\_privileges\_for\_atomic\_user.sql** from the Infrastructure config database before creating the new information domain. These Privileges should be given to the Production Schema (essentially all the Atomic schemas.).
- Add an Atomic schema TNS entry to TNSNames.ora.
- The following grants must be given to Config user for standalone installation.
  - `grant create TABLE to <CONFIG_USER>;`
  - `grant select on sys.v_$parameter TO <CONFIG_USER>;`
  - `grant unlimited tablespace to <CONFIG_USER>;`
- Oracle database User for Atomic schema should have the below grants
  - `grant create session to <ATOMIC_USER>;`
  - `grant create ANY INDEX to <ATOMIC_USER>;`
  - `grant create PROCEDURE to <ATOMIC_USER>;`
  - `grant create SEQUENCE to <ATOMIC_USER>;`
  - `grant DEBUG CONNECT SESSION to <ATOMIC_USER>;`
  - `grant create TABLE to <ATOMIC_USER>;`
  - `grant create VIEW to <ATOMIC_USER>;`

- grant select on sys.v\_\$parameter TO <ATOMIC\_USER>;
  - grant query rewrite to <ATOMIC\_USER>;
  - grant create materialized view to <ATOMIC\_USER>;
  - grant create trigger to <ATOMIC\_USER>;
  - grant unlimited tablespace to <ATOMIC\_USER>;
- Copy the entire Oracle Insurance Solvency II Analytics v2.0.0.0.0 installer download directory to the server location (Including the DataModel directory). Provide read, write and execute permission to all the files present in this directory.
  - Specify the log file path and name in the log4j.xml. Update the “value” attribute marked in the following picture

```
<!DOCTYPE log4j:configuration SYSTEM "log4j.dtd">
<log4j:configuration xmlns:log4j="http://jakarta.apache.org/log4j/">
  <appender name="ConfigReveleusFileAppender" class="org.apache.log4j.RollingFileAppender">
    <param name="file" value="/u02/setupkit/ALM60/log/FTP60.log"/>
    <param name="Append" value="true"/>
  </appender>
</log4j:configuration>
```

- Set the java path in .profile for Standalone Installation.
- Make sure the path given in the log4j.xml file has read/write/execute permission.
- Make sure FICServer is up and running before proceeding for installation (not applicable for standalone installation).

### 3.1.1 Oracle Insurance Solvency II Analytics version 2.0.0.0.0 Product Installation with Oracle Financial Services Analytical Applications Infrastructure 7.3.2.2.0

The Oracle Financial Services Analytical Applications Infrastructure Product comprises of components that are installed in Web, Application & Database layer. Hence if you have installed Oracle Financial Services Analytical Applications Infrastructure 7.3.2.2.0 in a multi-tier architecture, the Oracle Insurance Solvency II Analytics (SolvencyIIBI) Product installer must be invoked on each of the machines that host the Oracle Financial Services Analytical Applications Infrastructure tier.

For a Single-tier installation, the installer is required to be invoked only once on the machine that hosts all the Oracle Financial Services Analytical Applications Infrastructure tiers.

This section describes the installation process where the three product setup components are installed on separate machines. Machine A will be used to install Product Application Layer components, Machine B will be used to install Product Database Layer components, and Machine C will be used to install Product Web Layer components.

#### Note:

- This section holds applicable if Oracle Financial Services Analytical Applications Infrastructure v7.3.2.2.0 is installed on Oracle 11g on separate machines A and B respectively.
- Refer to section on “Silent Installation”, if a silent installation is required.

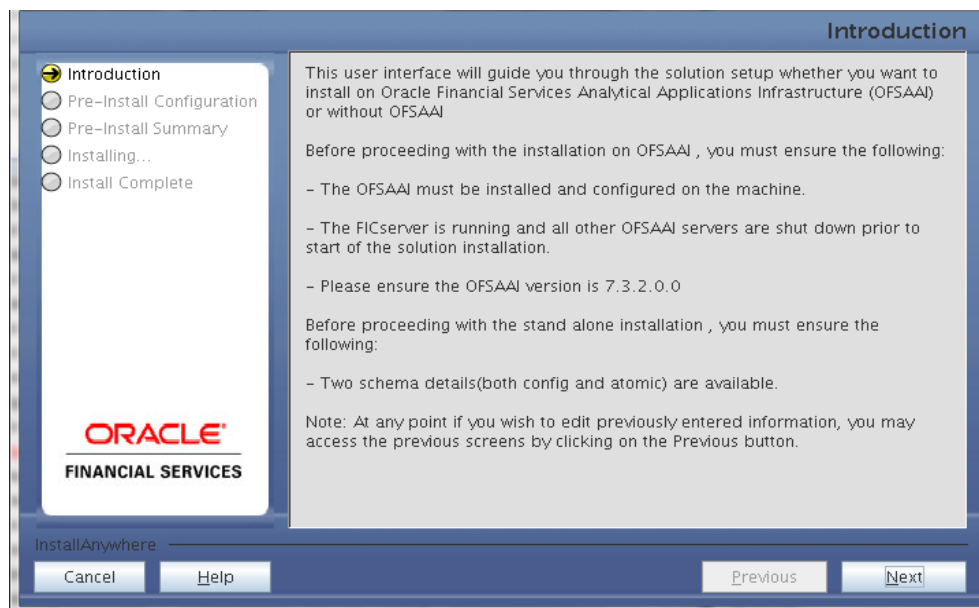
### 3.1.1.1 Machine A – Product App Layer

#### Step 1

To begin Oracle Insurance Solvency II Analytics product installation, execute Setup.sh.



#### Step 2

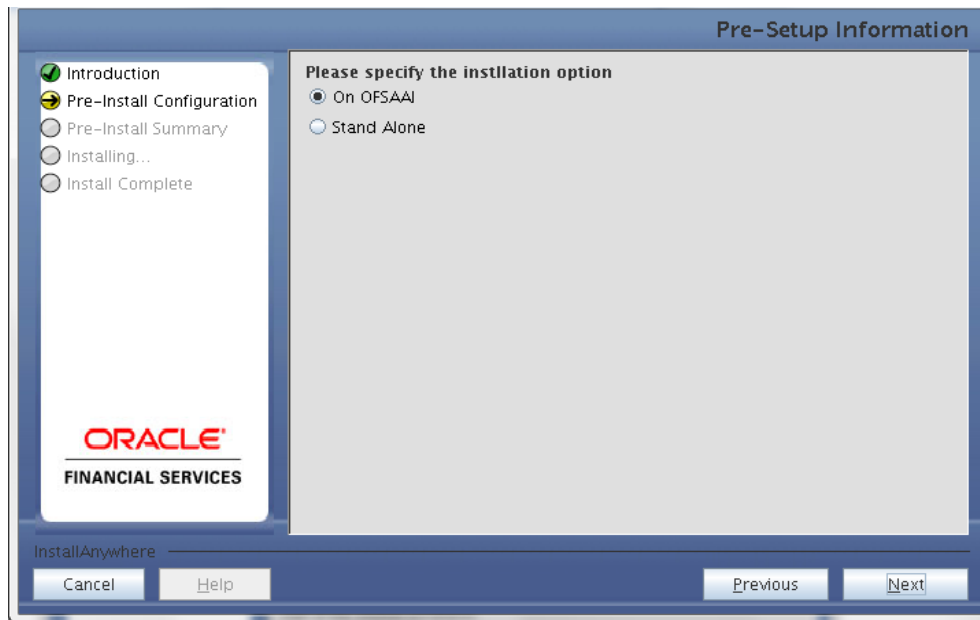


Upon invoking the installer, the Introduction screen displays the prerequisites for installation. Ensure that the prerequisites are satisfied before you proceed.

#### Step 3

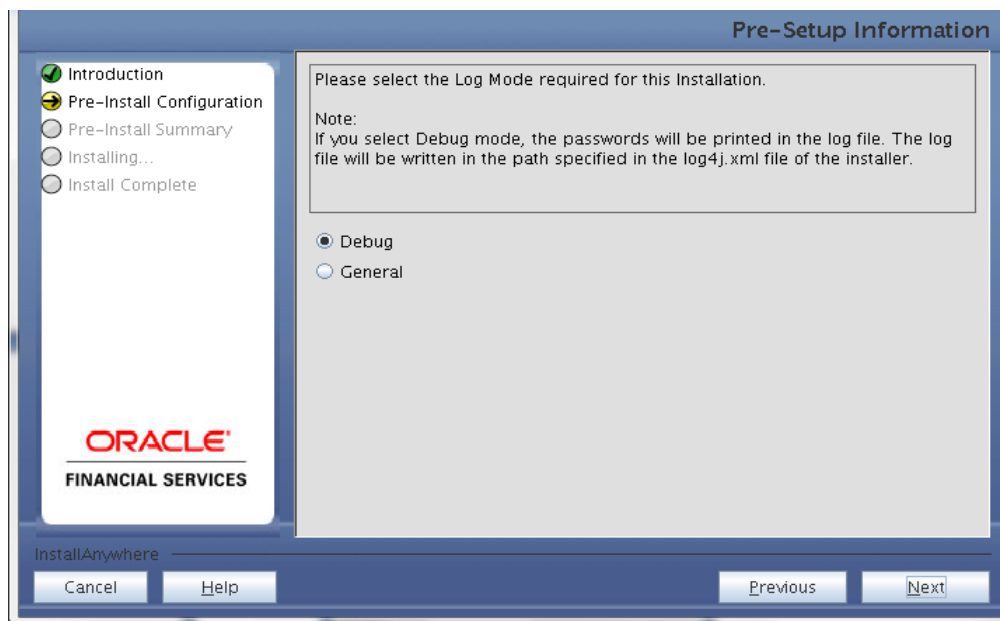
Choose the option "On OFSAAI" and click **Next**.





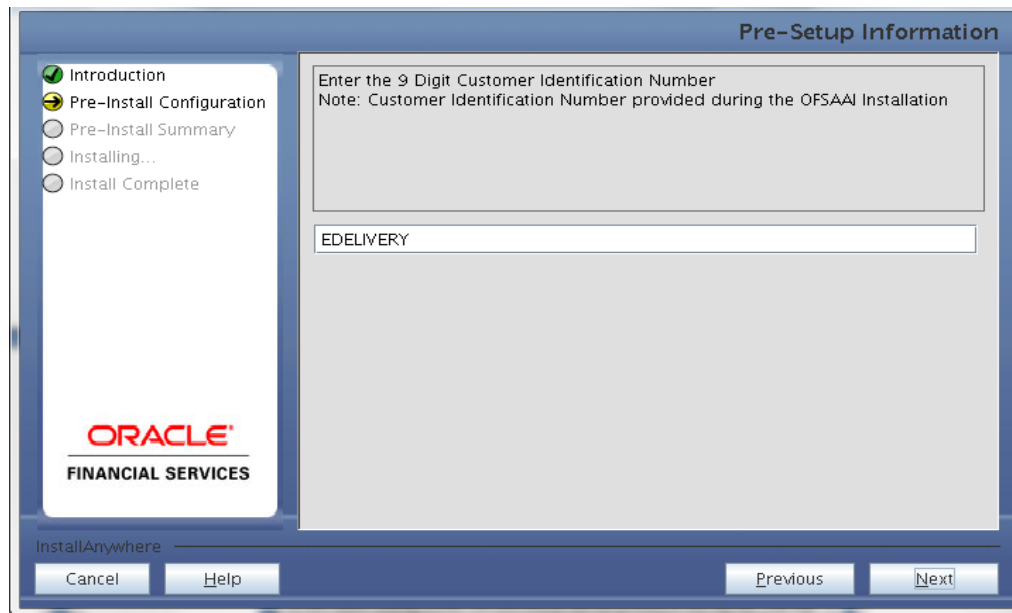
#### Step 4

Choose the log mode for this installer. If Debug is selected, the Passwords will be printed in the Log File.



#### Step 5

Provide the 9 digit Customer Identification number provided during the OFSAAI installation.



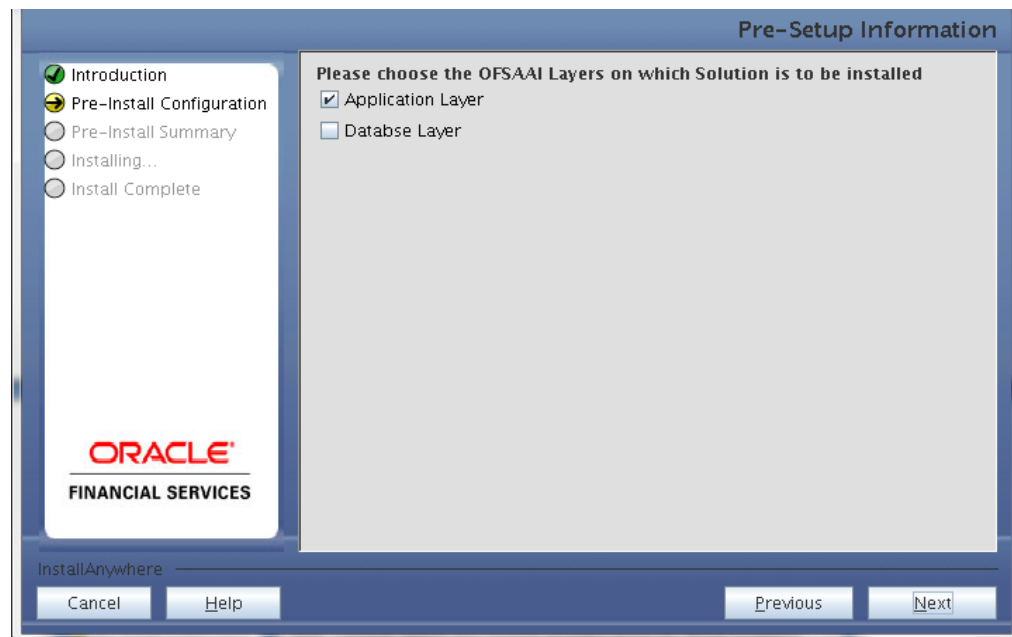
Click **Next** to continue.

### Step 6

The **Pre Setup Information** screen requests for setup information.

Select the appropriate Oracle Financial Services Analytical Applications Infrastructure layer that has been installed on the machine.

### Example AppLayer

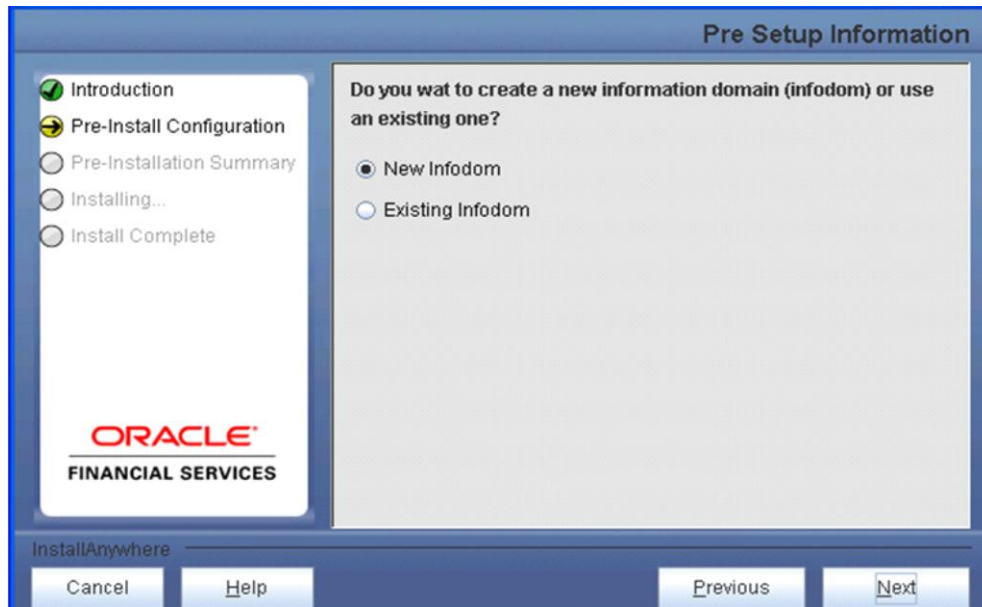


**Note:**

- For a single-tier Oracle Financial Services Analytical Applications Infrastructure v7.3.2.2.0 installation, you must select App Layer and DB Layer. For a multi-tier Oracle Financial Services Analytical Applications Infrastructure v7.3.2.2.0 installation, select the corresponding layer installed on the machine.

**Step 7**

This panel seeks information on whether a new infodomain has to be created or the existing infodomain to be used for installation. Choose the desired option.



Click **Next** to continue.

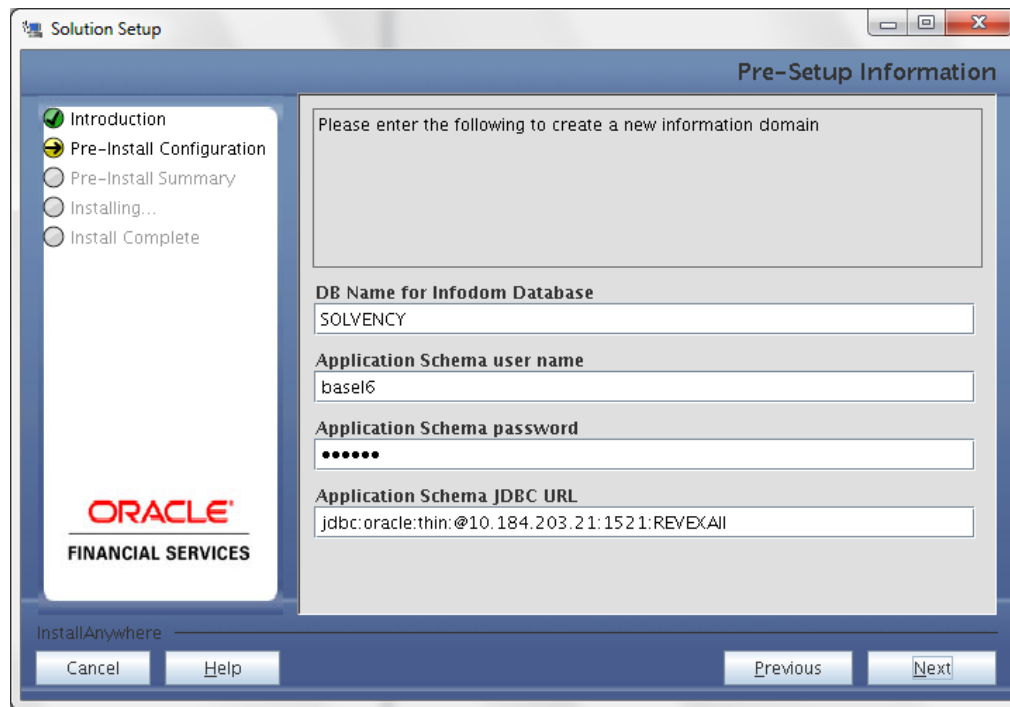
**Step 8-i**

If the option “New Infodomain” is selected in the previous panel then the following panel is displayed which seeks information on details relating to creating infodomain.

Specify a DB name for the new infodomain. Make a TNS entry with the DB name specified in the tnsname.ora file in the oracle server.

Enter the newly created atomic schema user name, password, jdbc url in relevant fields.

Click **Next** to continue.



### Step 8-ii

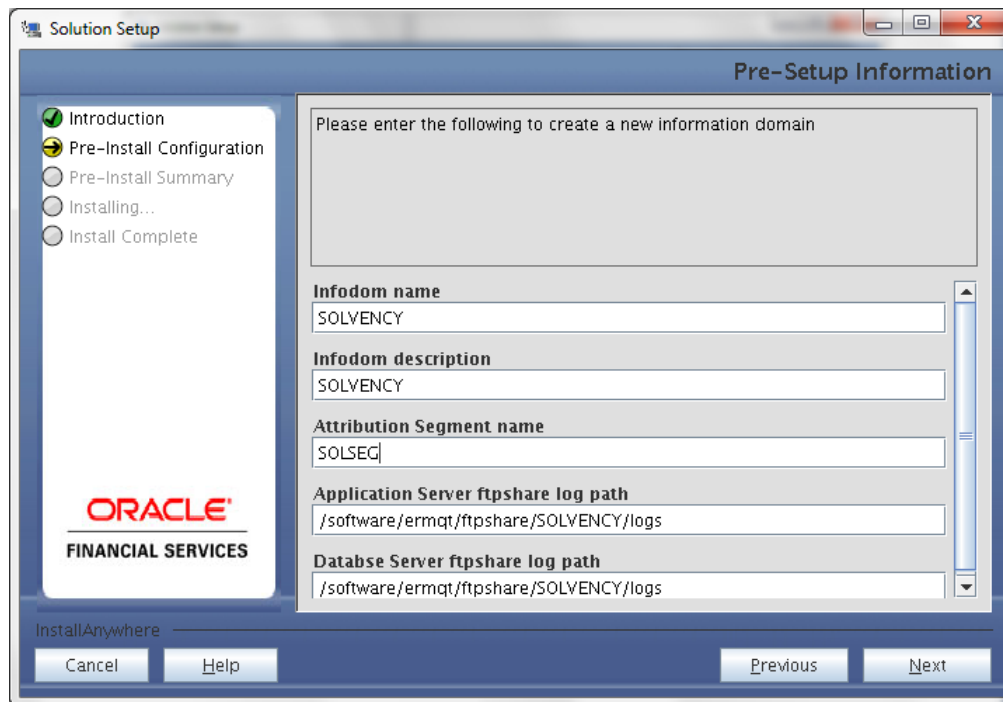
If the option “New Infodom” is selected in the previous panel then the following panel is displayed (following the panel 8-i) which seeks further information of the following details to create infodom.

Specify the name and description for the new infodom to be created.

Specify a segment name to be created.

Also, specify the Application server and database server log path for infodom maintenance (to be created)

**Note :** Segment name should not exceed 10 Characters.



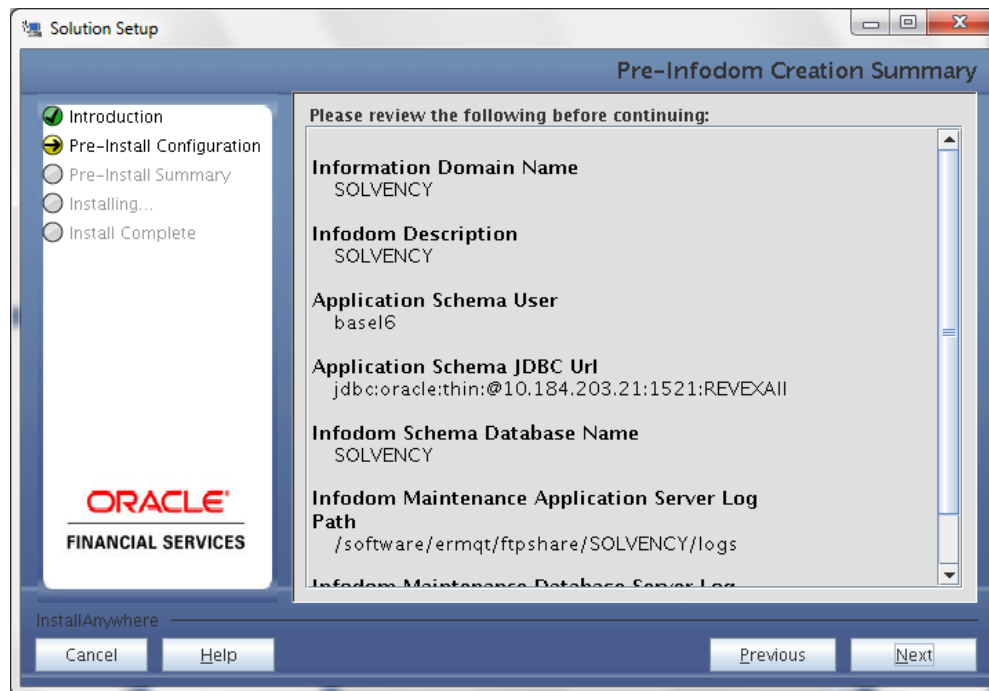
### NOTE

- The Oracle Financial Services Analytical Applications Infrastructure user is mapped to a role. These roles identify the user with Add/Modify and/or Read permissions for SOLVENCYBI metadata.

Click **Next** to continue.

### Step 8-iii

If the option “New Infodom” is selected in the previous panel then the following panel is displayed (following the panel 8-ii) which displays the pre-infodom creation details. Check and verify all the details before proceeding to the next step.

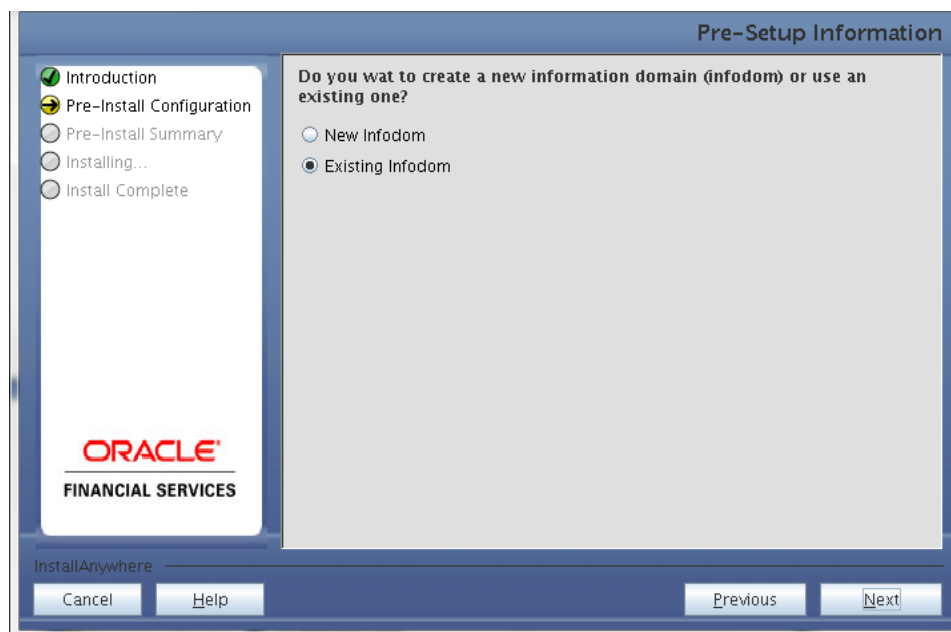


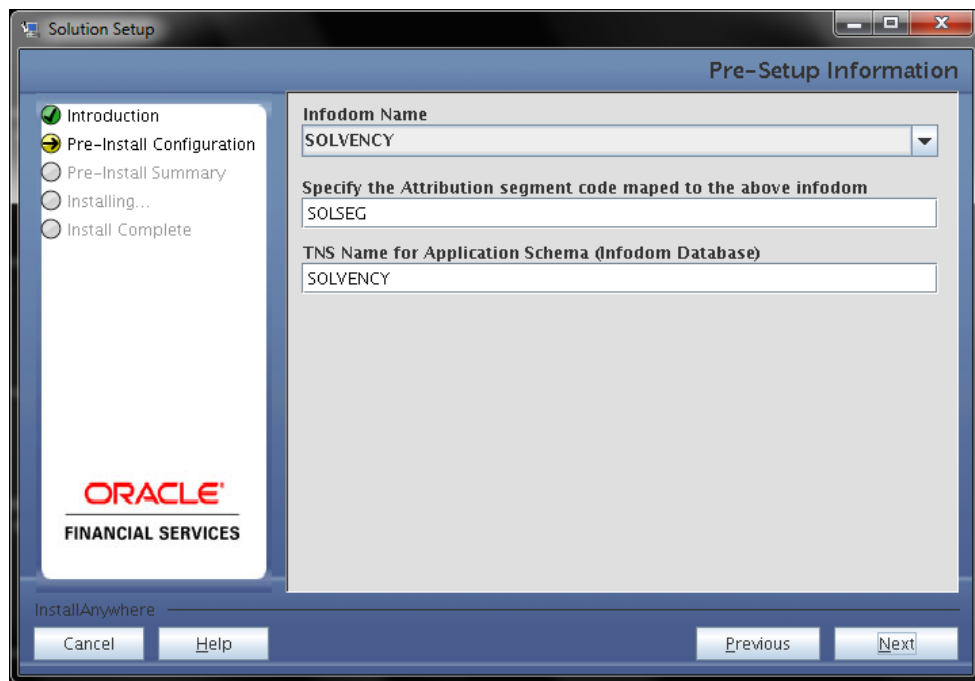
Click **Next** to continue creation of information domain.

#### Step 8-iv

If the option “Existing Infodom” is selected in the Step 6 then the following panel is displayed which prompts to select the infodom from list of infodoms present in the setup. Enter segment code and enter the application schema’s TNS name.

Segment code should not exceed 10 characters.

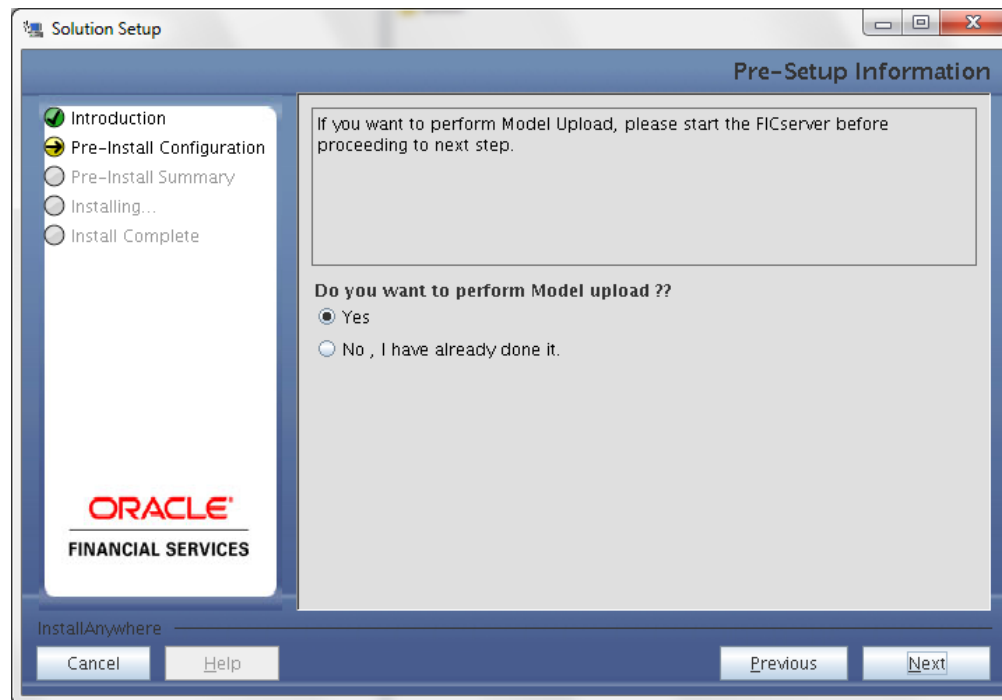




### Step 9

Oracle Insurance Solvency II Analytics v2.0.0.0.0 data model is packaged as part of Oracle Insurance Solvency II Analytics v2.0.0.0.0 product installer and will be installed as part of the upcoming steps, if required.

The following screen prompts the user to opt for model upload process through installer.



Clicking 'No' implies that Oracle Insurance Solvency II Analytics v2.0.0.0.0. model has been uploaded into information domain prior to this installation.

Clicking 'Yes' will proceed with the Oracle Insurance Solvency II Analytics v2.0.0.0.0 model upload process as part of the installation.

If the user selects "Yes", Step 10 and 11 will be performed..

Upon selecting "No, I have already done it", Step 10 to 11 will be skipped. Click **Next** to proceed.

### Step –10

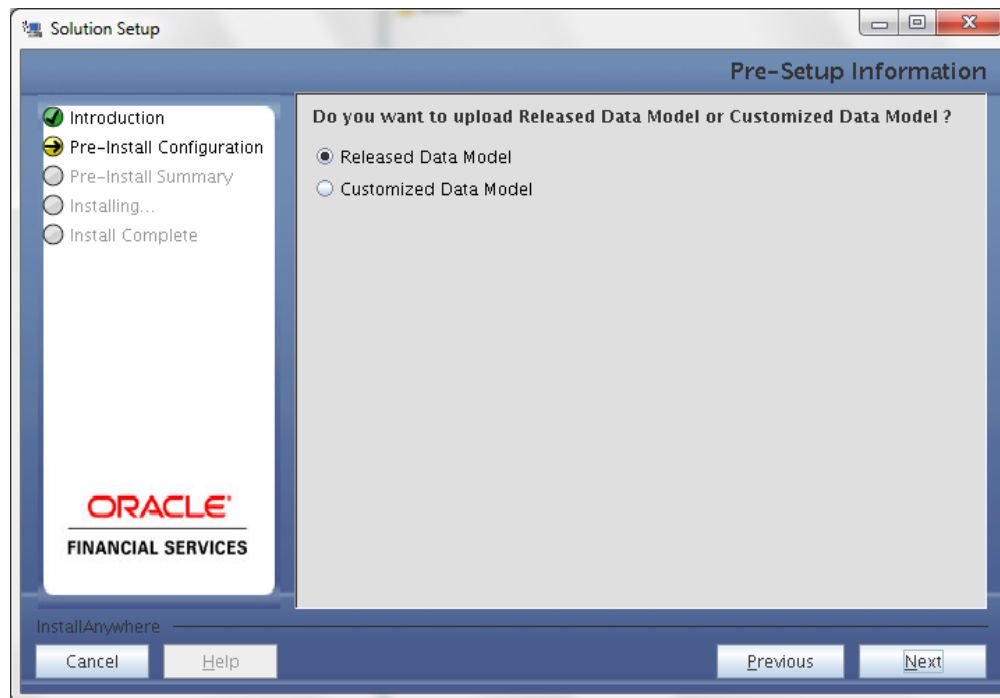
The following panel prompts the user to choose whether the released version of Datamodel or the customized datamodel to be uploaded.

On selecting 'Released Data Model' option, installer uploads the Oracle Insurance Solvency II Analytics v2.0.0.0.0 data model that is packaged as part of the Oracle Insurance Solvency II Analytics v2.0.0.0.0.0 product.

On selecting 'Customized Data Model' option, installer allows the user to select the data model. Please choose desired option.

Click **Next** to proceed.





### Step – 11

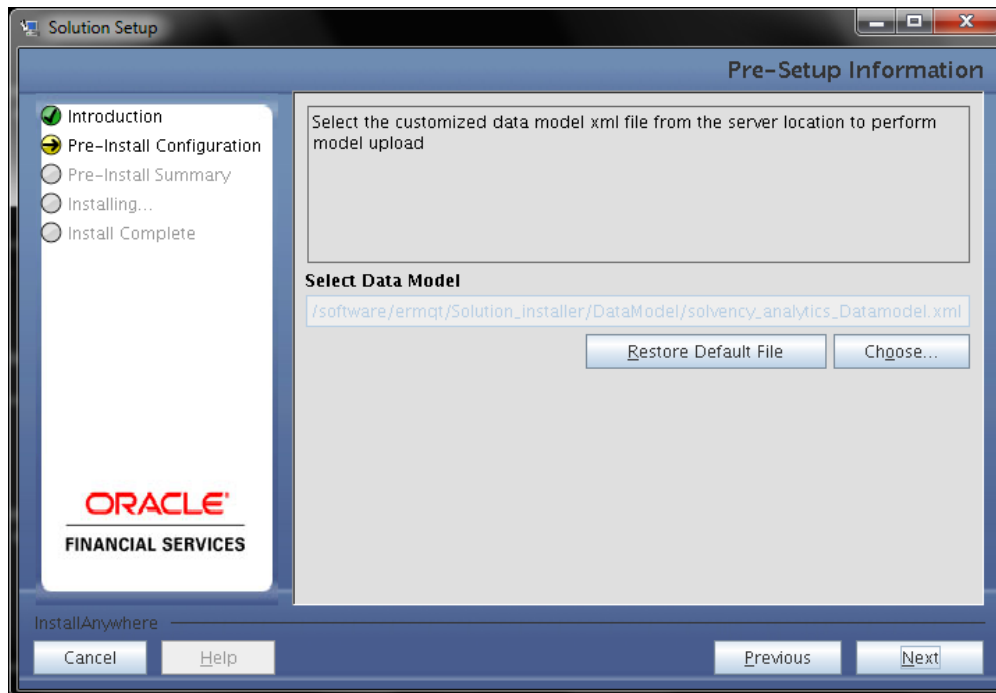
If the option “Customized Data Model” was chosen then the following panel will be displayed prompting user to select the customized data model located in the machine.

Please choose the customised datamodel file from the server.

#### Note:

- The data model xml file should be available in the server.
- In case the installation is being performed on an existing information domain, the data model that is planned to be selected in this panel should be merged with the data model that was previously uploaded in the information domain.

In case the installation is being performed on a new information domain, data model that is either customized or merged with other data models can be selected in this panel.

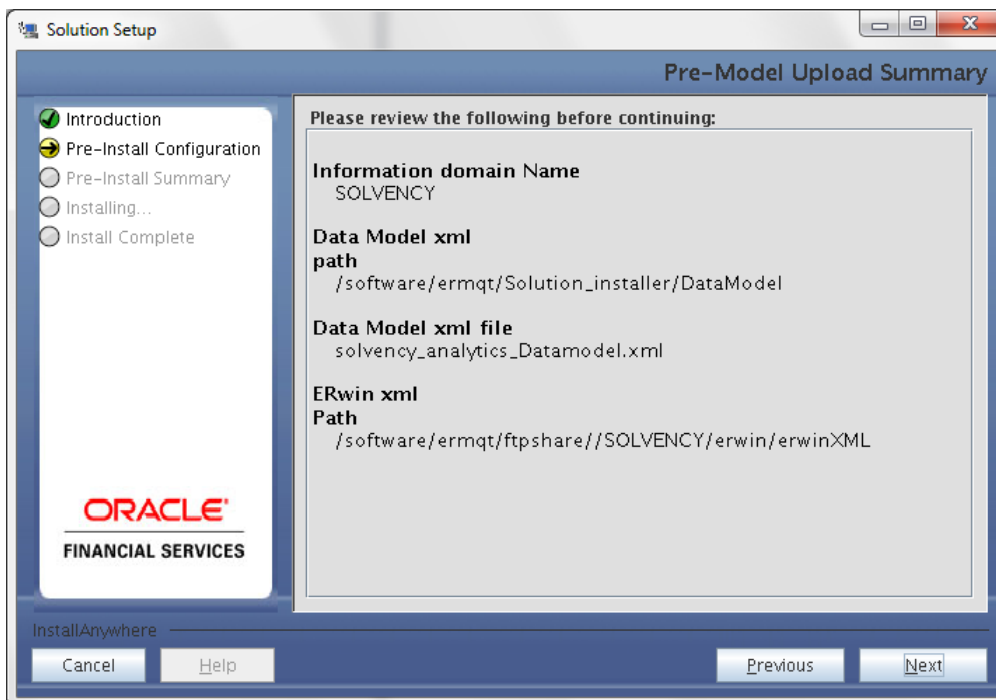


### Step – 12

The following panel displays pre-model upload details.

Please verify the details before proceeding to the next step.

Click **Next** to proceed for model upload.



Clicking '**Next**' will start the model upload process. This process will take some time depending on the size of the data model and available physical memory in the environment. User will not be able to take any further action on the screen, until the model upload process is complete. Also, this step cannot be rolled back.

If the model upload fails, then a pop-up message with relevant error and the log file path will be displayed.

Review errors and take relevant action. Continue with this step until the model upload is successful and the installer takes the user to next step.

**Note:**

Some of the common errors during model upload are

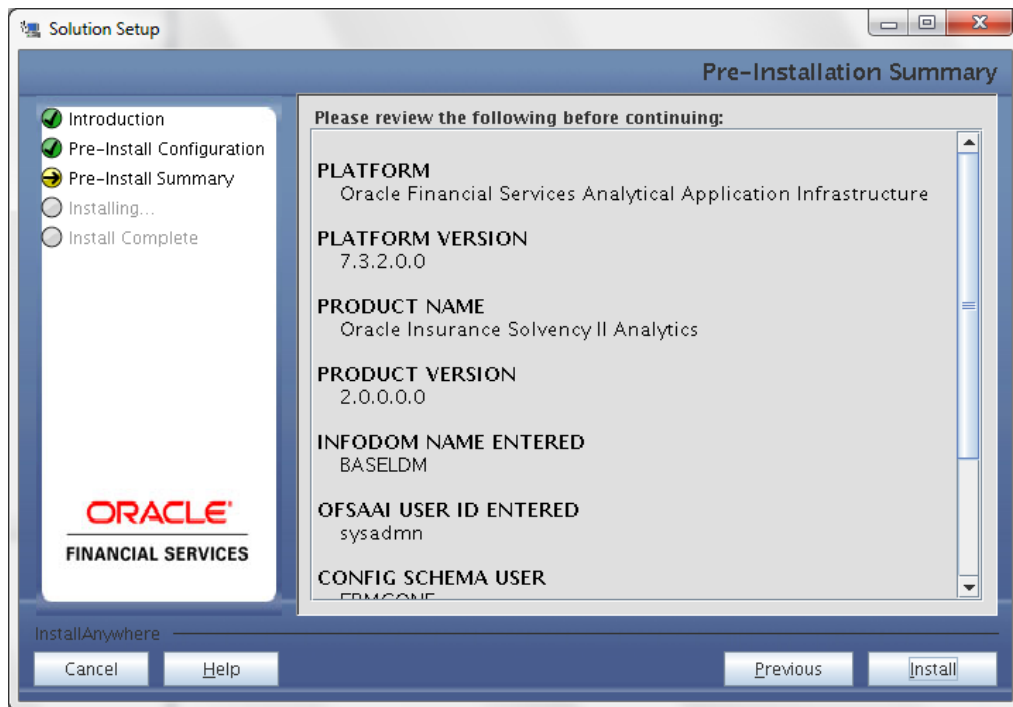
- Insufficient heap memory on the client machine
- Possible reason/resolution: The java memory settings in "reveusstartup.sh" located in \$FIC\_APP\_HOME/common/FICServer/bin directory should be increased.
- Error while getting the Erwin File path
- Possible reason/resolution: Restart the FICServer.
- Error in Upload Operation :
- "FAILED WHILE SUPER CATEGORY - SUB CATEGORY RELATIONS HANDLINGDELETING"
- Possible reason/resolution: Incorrect Erwin.xsl file version in \$FIC\_APP\_HOME/common/FICServer/conf directory.
- Incremental/Sliced model upload might give errors in case there are NOT NULL columns that are being added to a table that already has rows or if the columns that are being dropped have values. Check the data model changes excel file for any such cases. In such a case, take a backup of the table and truncate the table. Insert records back into the table with a default value for the NOT NULL column.

Navigate to the previous screen and proceed with the steps mentioned above.

### Step 13

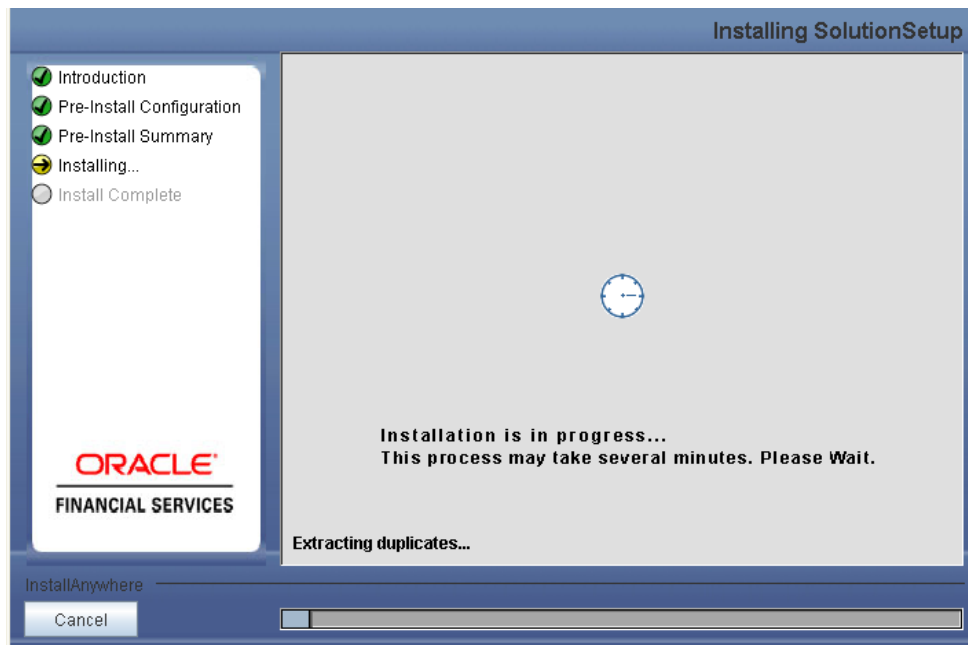
This panel displays all the pre-installation summary. Please verify all details and proceed.

Click **Install** to proceed.



#### Step 14

This panel displays the installation process. Kindly wait until it completes.

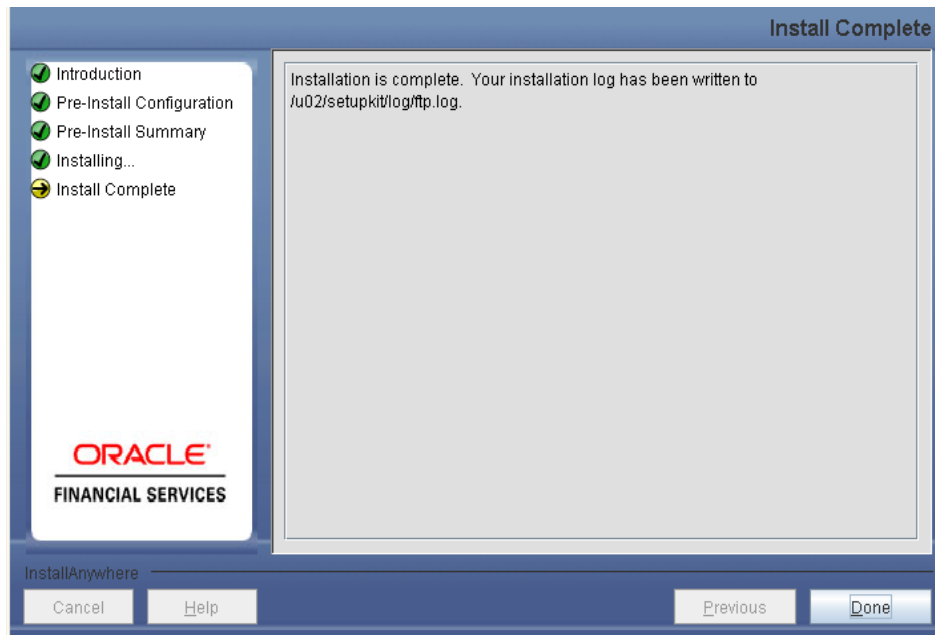


#### Step 15

The following screen displays the completion of installation of the Oracle Insurance Solvency II

### Analytics Product Setup.

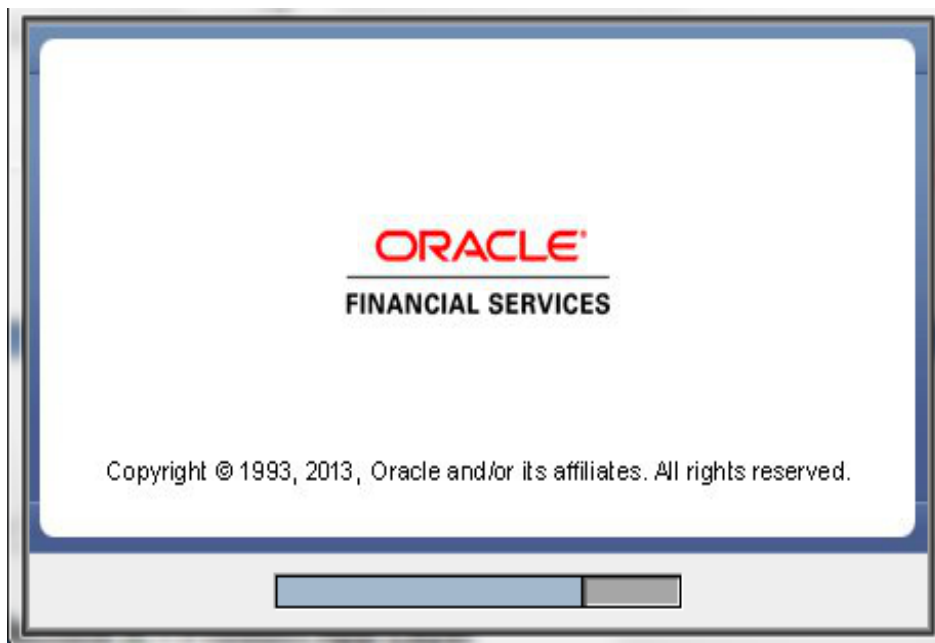
Click **Done** to exit.



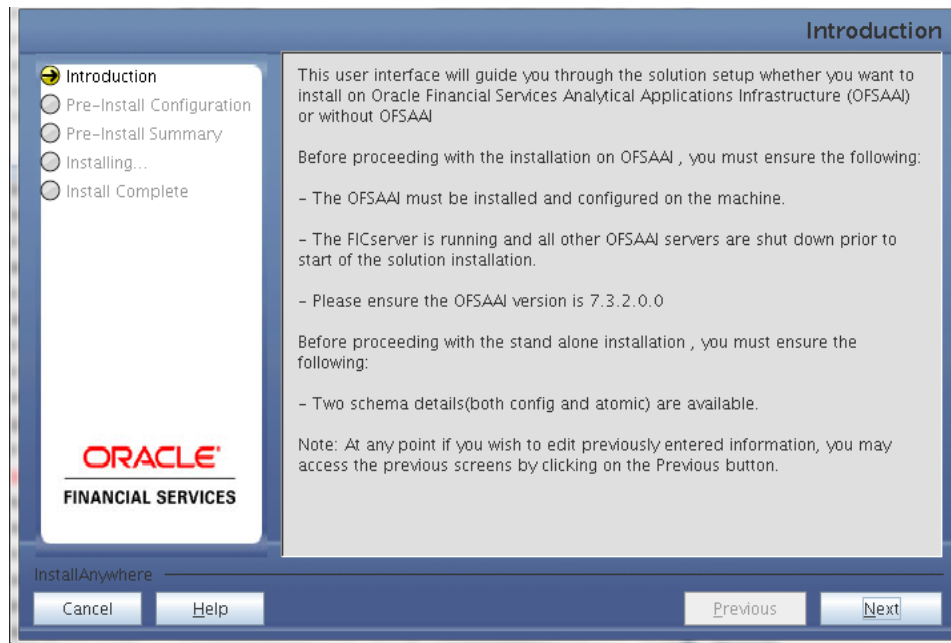
### 3.1.1.2 Machine B – Product Database Layer

#### Step 1

To begin Oracle Insurance Solvency II Analytics product installation, execute Setup.sh.



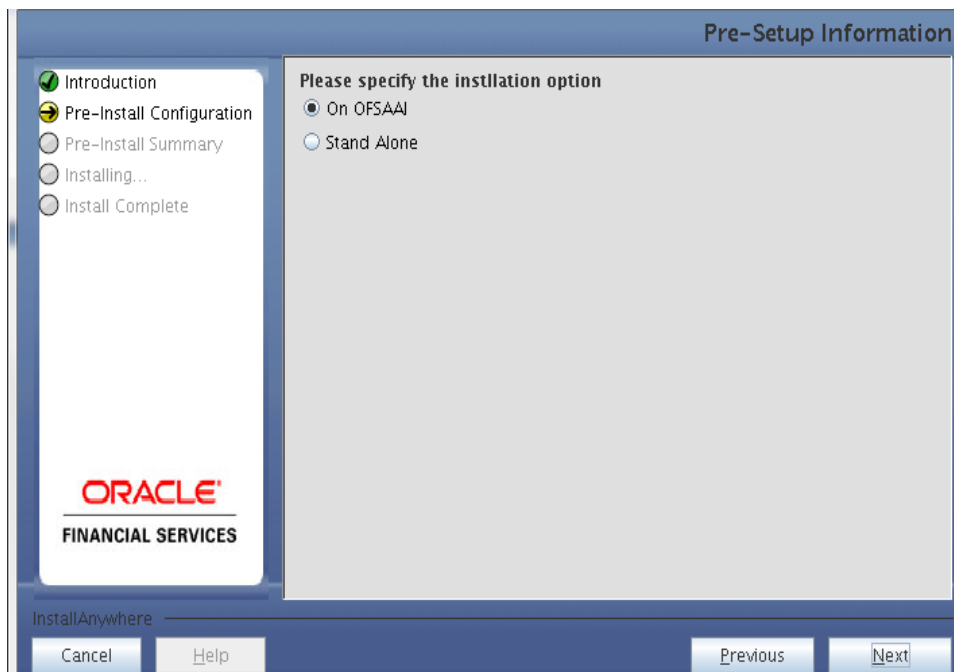
## Step 2



Upon invoking the installer, the **Introduction** screen displays the pre-requisites for installation. Ensure that the pre-requisites are satisfied before you proceed.

## Step 3

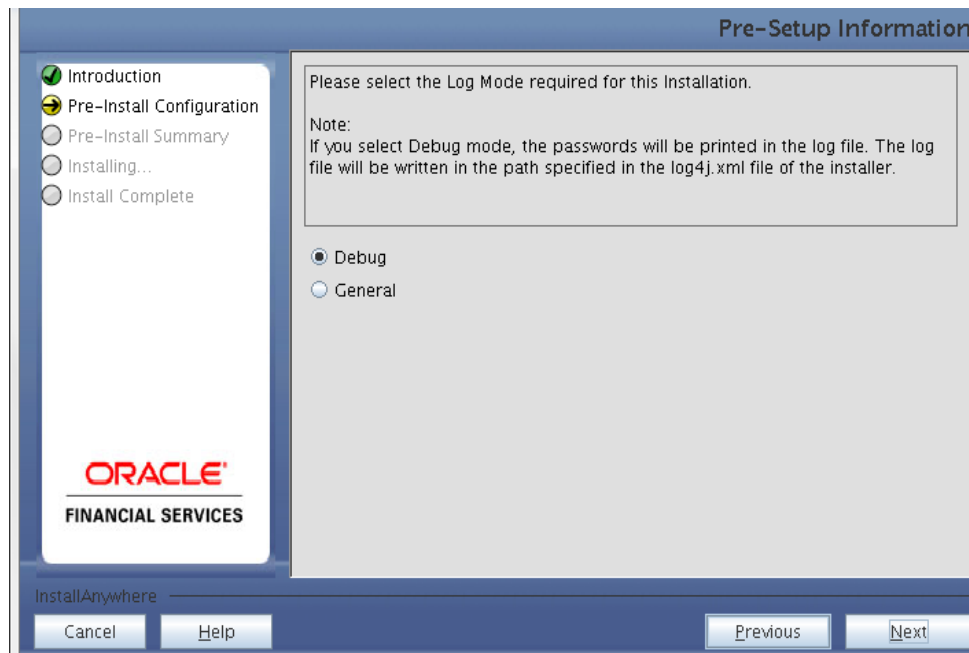
Select the option “On OFSAAI” since you are installing on OFSAAI.



#### Step 4

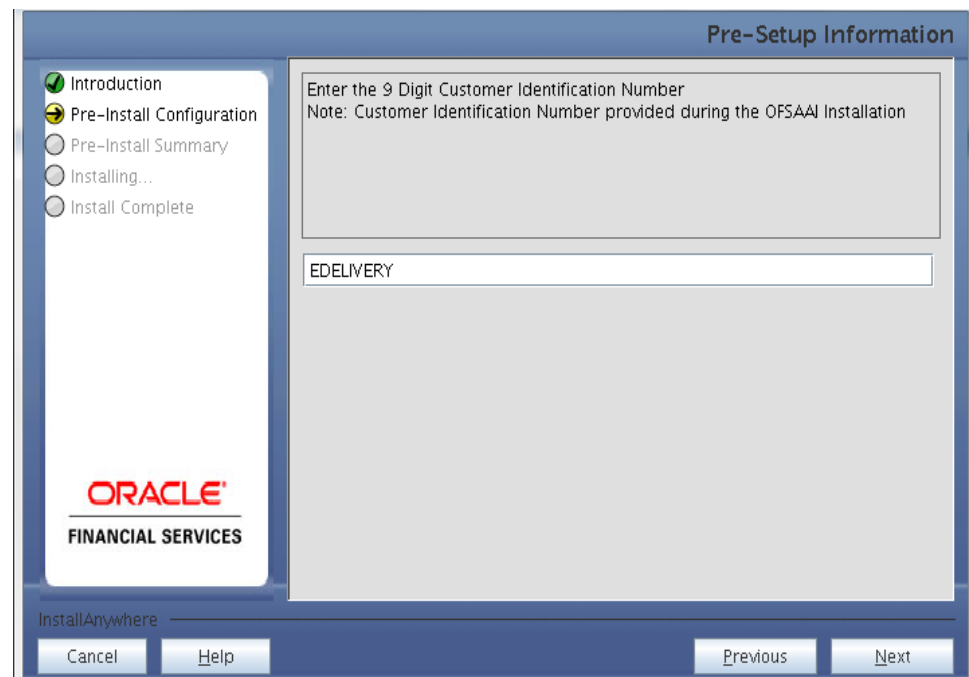
Choose the log mode for this installer. If Debug is selected, the Passwords will be printed in the Log File.

Click **Next** to proceed.



#### Step 5

Provide the 9 digit Customer Identification number provided during the OFSAAI installation.



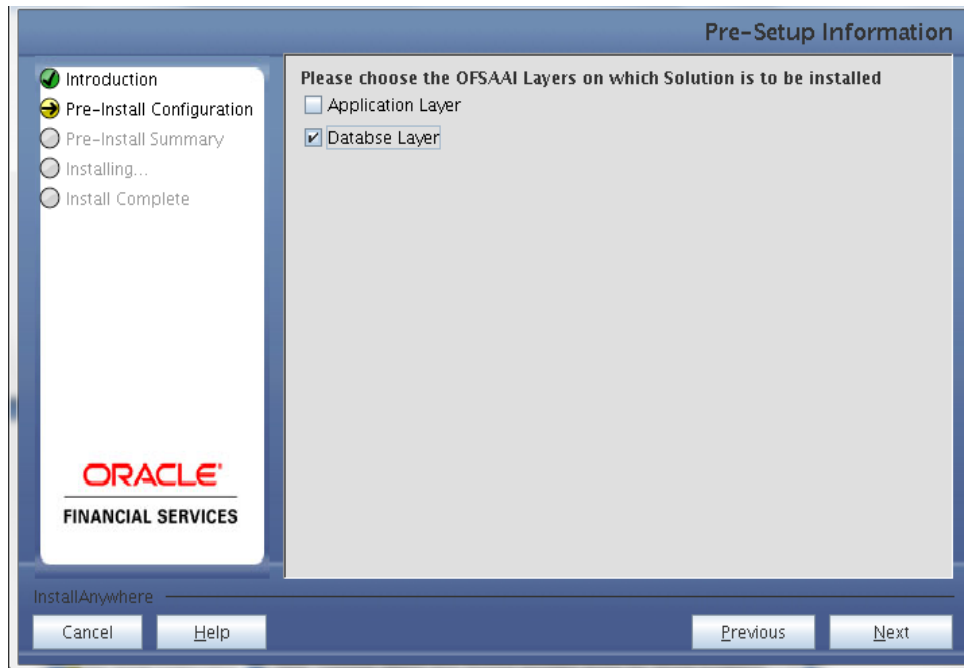
Click **Next** to continue.

## Step 6

The **Pre Setup Information** screen requests for setup information.

Select the appropriate Oracle Financial Services Analytical Applications Infrastructure layer that has been installed on the machine.

Example **Database Layer**



Along with appropriate Oracle Financial Services Analytical Applications Infrastructure layer choose Administrative Reports to configure the Administrative Reports application.

### NOTE

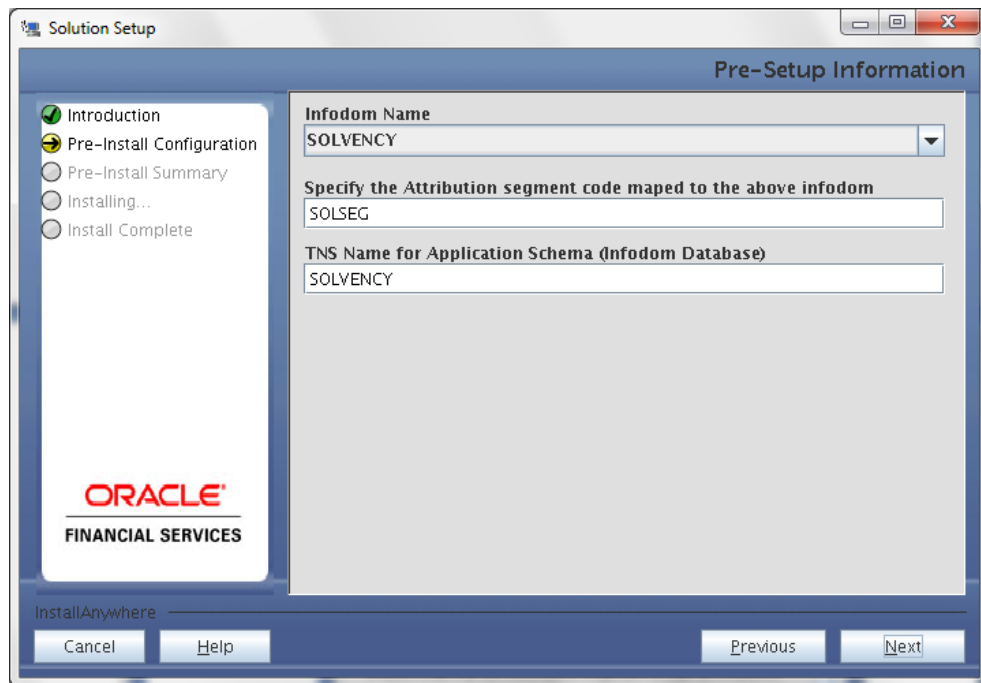
- For a single-tier Oracle Financial Services Analytical Applications Infrastructure v7.3.2.2.0 installation, you must select App Layer, DB Layer. For a multi-tier Oracle Financial Services Analytical Applications Infrastructure v7.3.2.2.0 installation, select the corresponding layer installed on the machine.

## Step 6

The following panel is displayed, wherein you can select the infodoms from list of infodoms present in the setup, enter segment code and enter the application schema's TNS name.

Segment code should not exceed 10 characters.

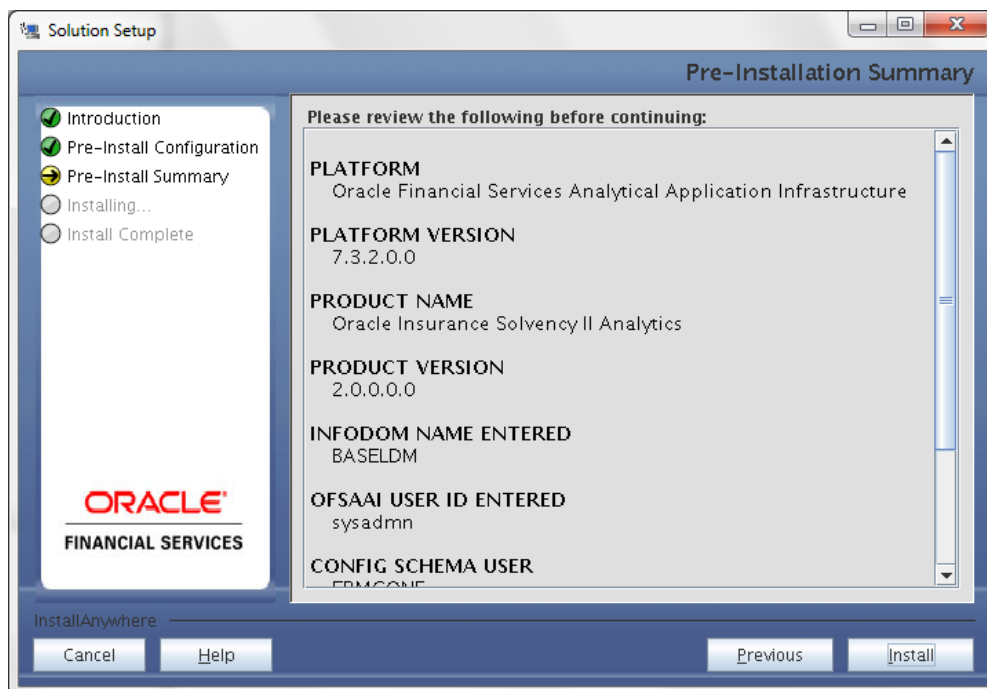




### Step 7

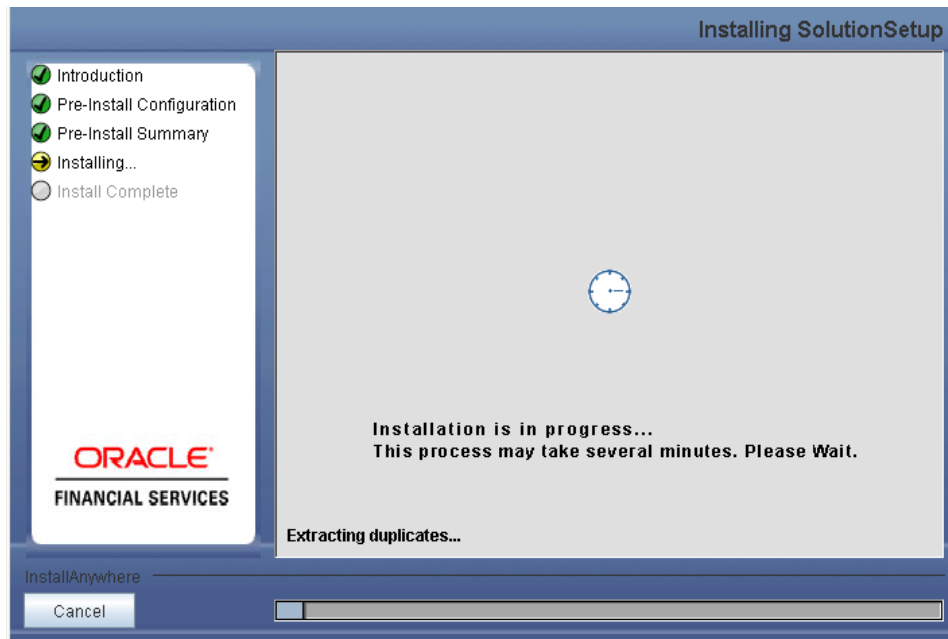
This panel displays all the pre-installation summary. Verify all details and proceed.

Click **Install** to proceed.



### Step 8

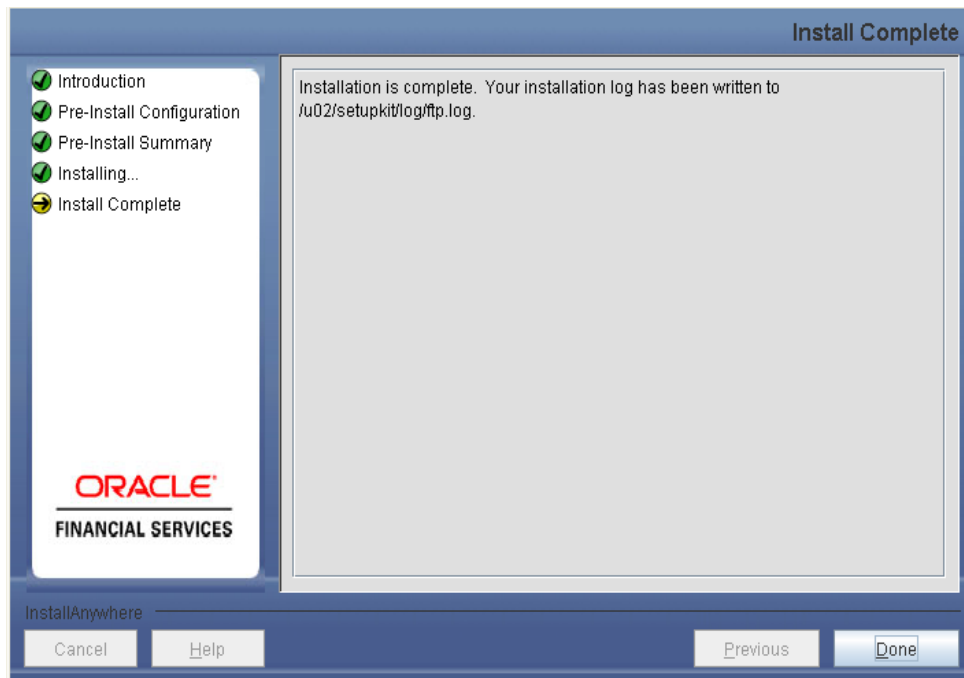
This panel displays the installation process. Kindly wait until it completes.



### Step 9

The following screen displays the completion of installation of the Oracle Insurance Solvency II Analytics Product Setup.

Click **Done** to exit.



### 3.1.2 Post Installation Activities

#### OFSAAI Server Memory Configuration

The Oracle Financial Services Analytical Applications Infrastructure Application Server is started using `revevusstartup.sh`. This file can be edited for setting customized memory settings, garbage collector settings depending on the available hardware configuration. Raise an SR in <https://flexsupp.iflexsolutions.com/> if you have any queries..

Once the installation of Oracle Financial Services SOLVENCYBI Product is completed, you must perform the following steps.

- Check the Log file (The path and file name specified in the `log4j.xml`).
- Ignore the following errors in the log file:
  - Error: ORA-02260: table can have only one primary key.
  - Error: ORA-00955: name is already used by an existing object.
  - Error: ORA-00001: unique constraint (<<UNIQUE KEY NAME>>) violated.
  - Error: ORA-02275: such a referential constraint already exists in the table.
  - Error: ORA-01430: column being added already exists in table.
  - Error: ORA-02303: cannot drop or replace a type with type or table dependents
- For with OFSAAI installation: Copy the Repository, Images and Catalog file from the `$FIC_HOME/SOLVENCYII/` and place it in the Repository folder where OBIEE is installed

- For Standalone installation: Copy the Repository, Images and Catalog file from <Installation Dir>/SOLVENCYII/ and place it in the Repository folder where OBIEE is installed

## **3.2 Oracle Insurance Solvency II Analytics Version 2.0.0.0.0 Product Installation without Oracle Financial Services Analytical Application Infrastructure**

### **3.2.1 Oracle Insurance Solvency Analytics v2.0.0.0.0 Installation**

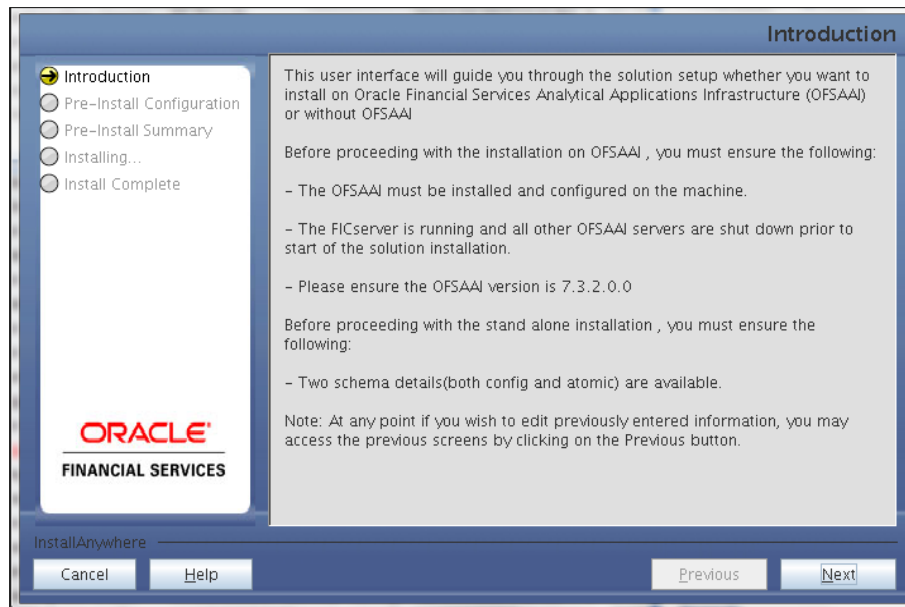
Refer the following steps to install Oracle Insurance Solvency II Analytics v2.0.0.0.0 without OFSAAI.

#### **Step 1**

To begin Oracle Insurance Solvency II Analytics product installation, execute Setup.sh.

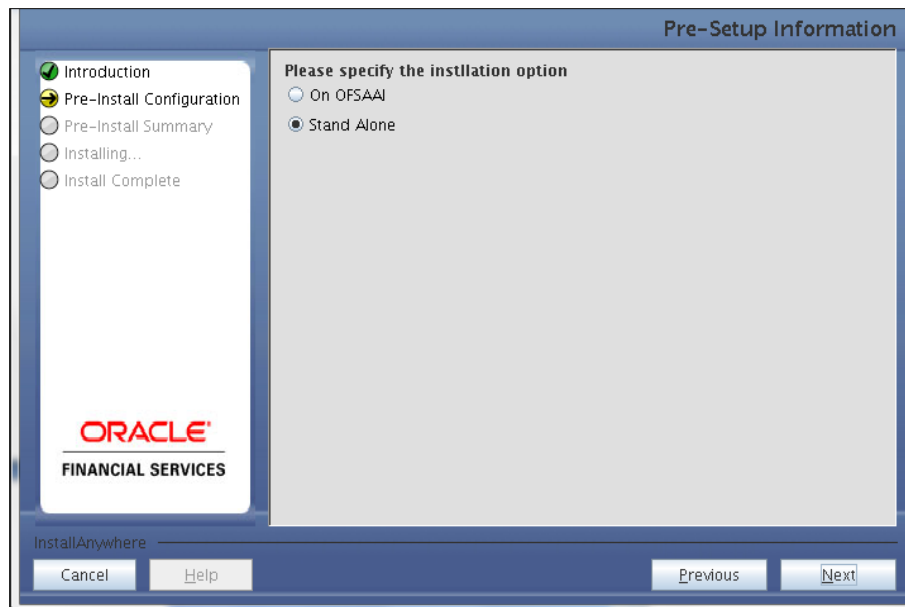


## Step 2



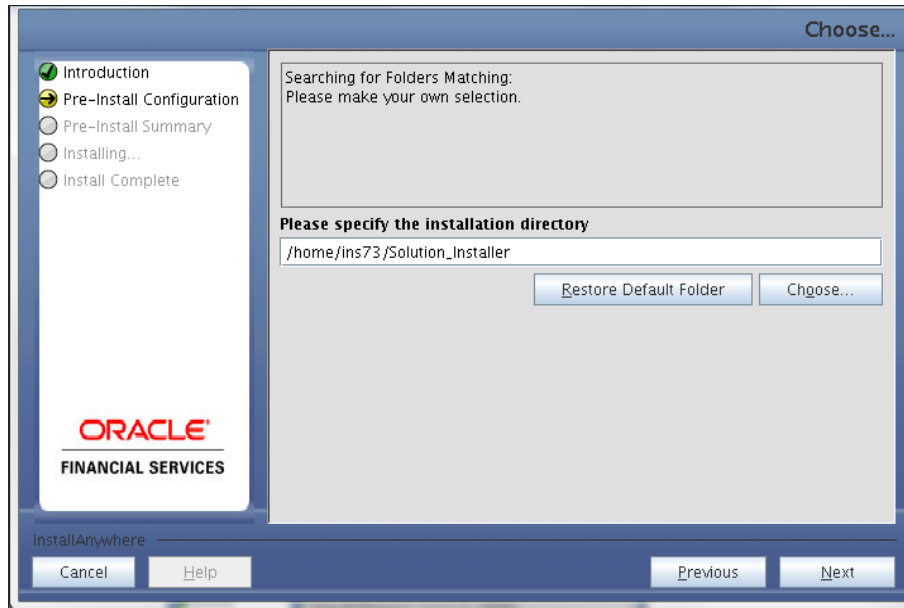
## Step 3

Select the option “Stand Alone” and click **Next**.



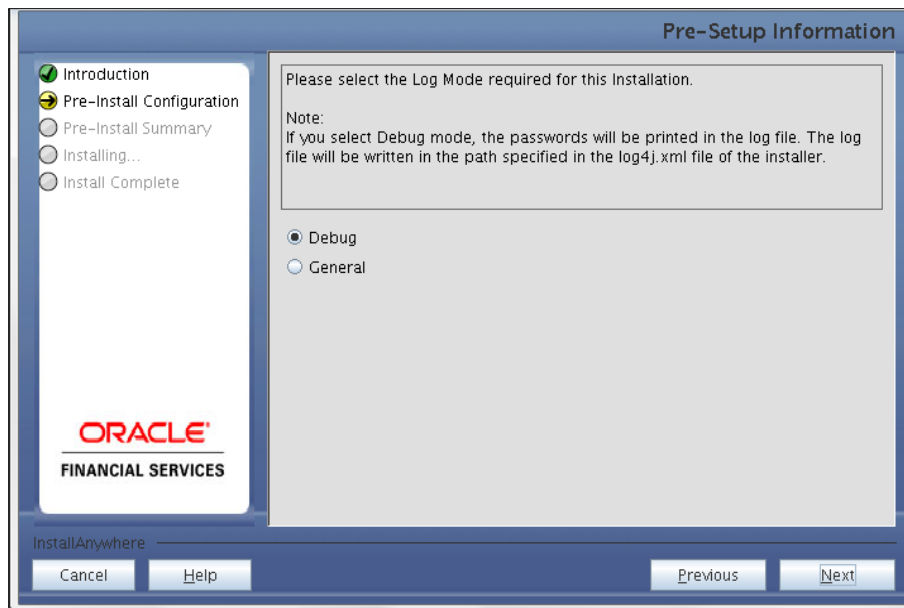
## Step 4

Specify the installation directory.



### Step 5

Choose the log mode for this installer. If Debug is selected, the Passwords will be printed in the Log File.

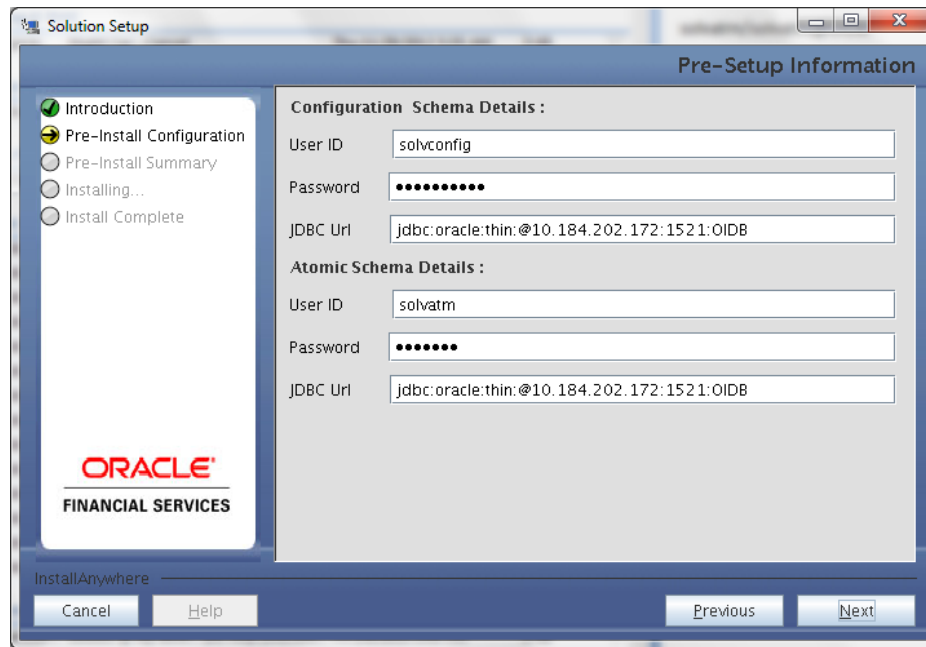


Click **Next**.

### Step – 6

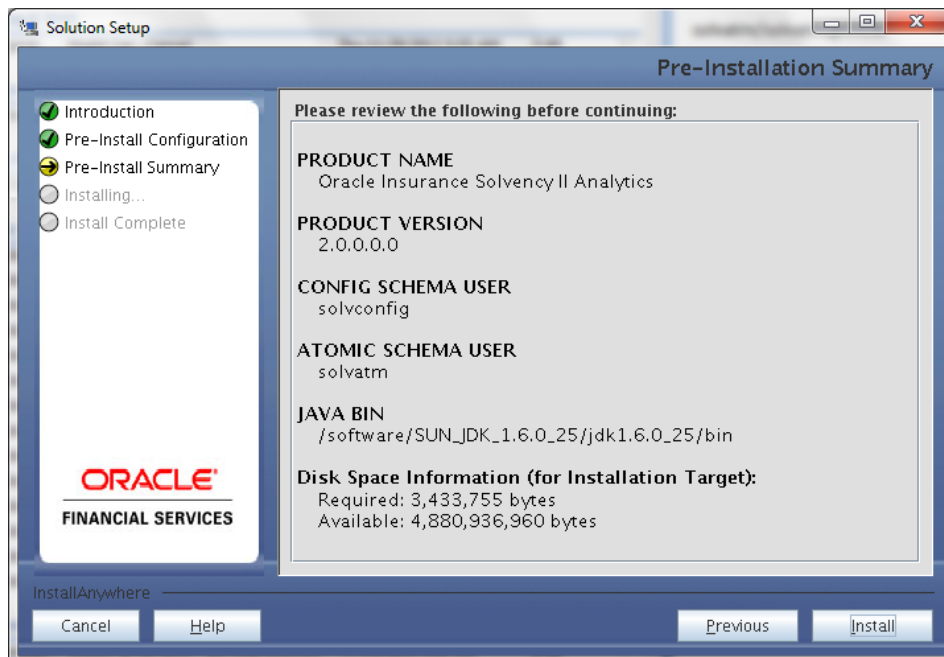
Specify the Config and Atomic schema details.

Click **Next**.



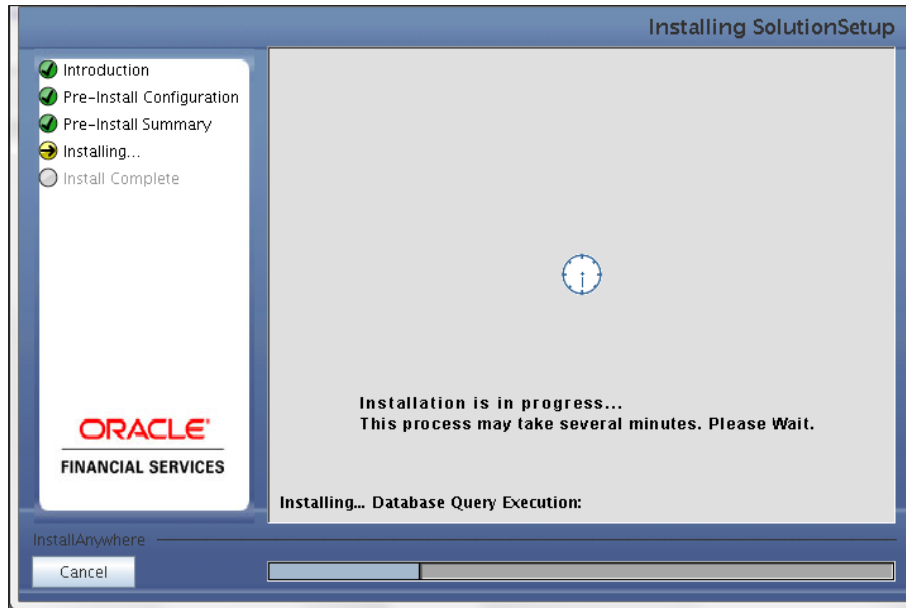
**Step 7:**

Installer Summary Screen is displayed as follows:



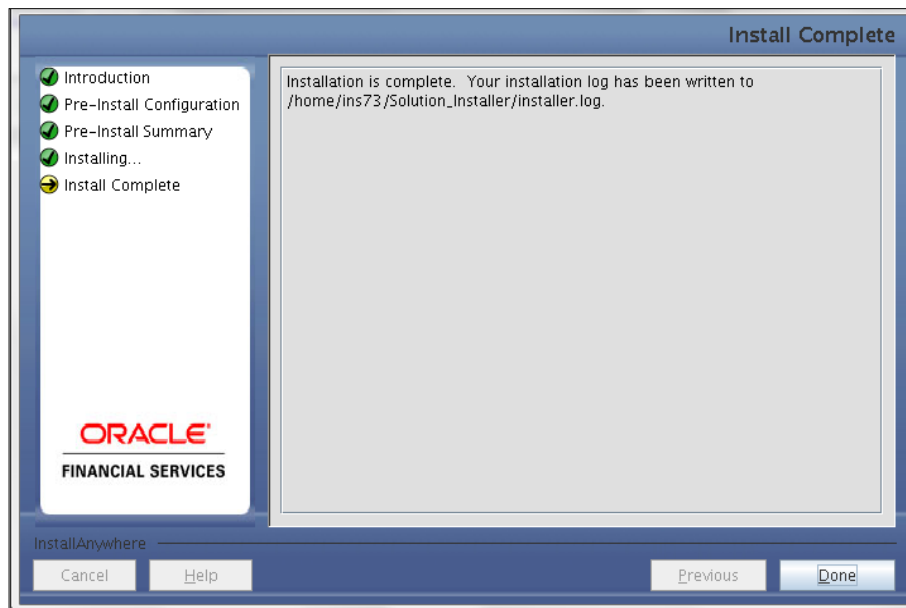
**Step 8:**

This panel displays the installation process. Kindly wait until it completes.



The following screen displays the completion of installation of the Oracle Insurance Solvency II Analytics product Setup.

Click **Done** to exit





### 3.3 Installing Oracle Insurance Solvency II Analytics Version 2.0.0.0.0 Installation- Silent Mode

Silent installation is achieved via a properties file [Silent.props] that must be updated with proper values, before attempting to install using the silent mode.

#### How to install in Silent Mode

- Edit the file "Silent.props" and specify the parameters as per the requirements
- On the UNIX Command prompt, execute the following command
  - o "Setup.sh SILENT"
- Refer to the console log [or the file preinstall.log] for any error messages.

The following table lists all the properties that need to be specified:

Property Name	Description of Property	Permissible values	Comments	Without OFSAAI
LOG_MODE	Mode for logging	1 = Debug 0 = General	Optional; Default : 0	Required
CUSTOMER_ID	Customer id specified while installing OFSAAI	Not Applicable	MANDATORY	Not Required
OFSAI_MODE	Mode of installation i.e. with/without OFSAAI	0 = With OFSAAI 1 = Without OFSAAI	MANDATORY	Required
INSTALL_DIR	Specify the installation directory	Not Applicable	Mandatory only if OFSAI_MODE = 1	Required if OFSAI_MODE = 1 (Mandatory)
CONF_USER	Specify the configuration schema user id	Not Applicable	Mandatory only if OFSAI_MODE = 1	Required if OFSAI_MODE = 1 (Mandatory)
CONF_URL	Specify the configuration schema JDBC url	Not Applicable	Mandatory only if OFSAI_MODE = 1	Required if OFSAI_MODE = 1 (Mandatory)

INSTALL_DB	Install database-tier components	0 = No 1 = Yes	Default : 0	Not required if OFSAA_MODE=1
INSTALL_APP	Install Application-tier components be installed	0 = No 1 = Yes	Default : 0	Not required if OFSAA_MODE=1
INFODOM_NAME	Information Domain(infodom )	Not Applicable	MANDATORY	Not required if OFSAA_MODE=1
SEGMENT_CODE	Segment Code	Not Applicable	MANDATORY Segment Code should not exceed 10 characters	Not required if OFSAA_MODE=1
INFODOM_TYPE	New Infodom or Existing Infodom	0 = New 1 = Existing	# Specify Infodom Type  Mandatory if this an App Layer Installation and option selected for INSTALL_APP=1	Not required if OFSAA_MODE=1
APPL_TNS	TNS Name of the Infodom database	Not Applicable	MANDATORY	Not required if OFSAA_MODE=1
APPL_USER	User-id of the Database Schema for new Infodom	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0	Required if OFSAA_MODE=1

APPL_PWD	Password of the Database Schema for new Infodom	Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom.  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0	Required if OFSAA_MODE=1
APPL_URL	JDBC Connection String of the the Database Schema for new Infodom	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0	Required if OFSAA_MODE=1
INFODOM_DESC	Description for the Database Schema for new Infodom	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0	Not required if OFSAA_MODE=1
APPFTP_LOG_PATH	Infodom Maintenance log path(to be created) for the	Not Applicable	# Mandatory if this an App Layer Installation and want to create a	Not required if OFSAA_MODE=1

	new Infodom for applayer		new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE= 0	
DBFTP_LOG_PATH	Infodom Maintenance log path(to be created) for the new Infodom for DBLayer	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE= 0	Not required if OFSAA_MODE= 1
UPLOAD_MODEL	If you want to perform Model Upload	0 = No, 1= Yes	Mandatory if INSTALL_APP=1	Not required if OFSAA_MODE= 1
MODEL_TYPE	Released datamodel or customized datamodel	0 = released, 1= customized	Mandatory if INSTALL_APP=1	Not required if OFSAA_MODE= 1
DM_DIRECTORY	The filename for customized data model	Not applicable	# Mandatory only if you want to upload the customized datamodel i.e you have specified MODEL_TYPE=1	Not required if OFSAA_MODE= 1
DATAMODEL	The path for the customized data model	Not applicable	# Mandatory only if you want to upload the customized datamodel i.e you have specified MODEL_TYPE=1	Not required if OFSAA_MODE= 1

## 4. Oracle Insurance Solvency II Analytics 2.0.0.0.0 Configuration

### 4.1 Introduction

#### 4.1.1 Assumptions

- If Oracle Insurance Solvency II Analytics product is installed, then the table scripts need not be executed as described in Section 4.2.1 of this document
- The database schema will have proper privileges namely: `CONNECT`, `RESOURCE` AND `CREATE MATERIALIZED VIEW`, to execute the above mentioned scripts.
- OBIEE 11.1.1.6.10 Server (Enterprise installation) for the respective operating system is installed.
- Administrator knows how to start/shutdown the OBIEE servers namely;
  - Weblogic Server
  - Oracle BI Server
  - Oracle BI Presentation Server
  - Oracle BI Java Host
- Administrator knows the OBIEE installation path

#### 4.1.2 Pre-requisites

- a. Backup following OBIEE folders (*for existing installation, not required for new installation*) :
  - `<Installation Path>\middleware\instances\instance1\bifoundation\OracleBIServerComponent\coreapplication_obis1\repository`
  - `<Installation Path>\middleware\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\catalog\<new folder created as part of Installation steps>`
- b. Server details i.e. url of OBIEE should be kept in handy
- c. Following OBIEE related files/folders are copied to the local machine by the installer:

##### **With Oracle Insurance Solvency II Analytics Application**

- “\$FIC\_HOME/SolvencyII/”, this folder has the archive for dashboard and Answer (report) related files. Do not unzip these files, as these files are not zip files.
- \$FIC\_HOME/SolvencyII/repository/, this folder have the Insurance.rpd file.
- \$FIC\_HOME/SolvencyII/Images/Oracle Insurance Solvency II Analytics 2.0 - Images.zip; this has image files which are used in the reports (for new installation). Unzip this file in the same folder.
- \$FIC\_HOME/SolvencyII/dashboardconfiguration/CreateAppRoles.py; this is a script which is used for application role creation (for new installation).
- \$FIC\_HOME/SolvencyII/dashboardconfiguration/SetComment.xml; this is an xml file required for OBIEE write back configuration (for new installation).

**Without Oracle Insurance Solvency II Analytics Application**

- <Installation Dir>/SolvencyII/catalog/; this folder have the archive for dashboard and Answer (report) related files. Do not unzip these files, as these files are not zip files.
- <Installation Dir>/SolvencyII/repository/; this folder have the Insurance.rpd file.
- <Installation Dir>/SolvencyII/Images/Oracle Insurance Solvency II Analytics 2.0 - Images.zip; this has image files which are used in the reports (for new installation). Unzip this file in the same folder.
- <Installation Dir>/SolvencyII/dashboardconfiguration/CreateAppRoles.py; this is a script which is used for application role creation (for new installation).
- <Installation Dir>/SolvencyII/dashboardconfiguration/SetComment.xml; this is an xml file required for OBIEE write back configuration (for new installation).

## 4.2 Installation Steps

### 4.2.1 Script Execution

Following scripts (from \<Installation Dir>\Scripts\atomic\create\ can be executed, if required, in the database as per the purpose provided along with the script below.

Serial Number	Purpose	File to be executed.
1	This script is provided to disable logging of materialized views, and the same can be used as per Institution's policy	13-ALTER_MATERIALIZED_VIEW_FOR_NOLOGGING_Script.sql
2	This script is provided to refresh all the materialized views, incase the data of the base tables have been modified or after loading of fresh data. This script needs to be executed once data for all the fact and dimension	13-REFRESH_MATERIALIZED_VIEW_Script.sql

	tables are populated	
3	This script is provided to drop all the materialized views whenever required. Hence, this is not for first time installation of the application	13-drop materialized view scripts.sql

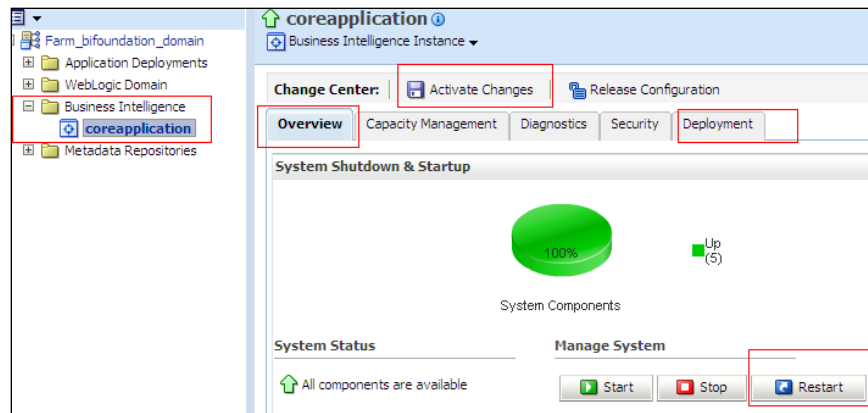
Following script (from \<Installation Dir>\Scripts\atomic\insert\ should be executed in the database as per the purpose provided along with the script below.

Serial Number	Purpose	File to be executed.
1	<p>This script needs to be executed only once the data is populated in "dim_org_structure" table. This script is provided to update the heat map tables for Organization Structure hierarchy.</p> <p>This script should be executed only after executing "14-Heat_map_heirarchy_tab.sql" (executed as part of the installer), as it creates the table "ORG_STRUCTURE_HIERARCHY". Ensure that the table "ORG_STRUCTURE_HIERARCHY" is empty before executing the script</p>	16-Org_struct_heirarchy_data.sql

#### 4.2.2 Server Configuration steps (for each release confirm that the following has been setup):

- a. Add the tnsnames.ora file in the following folder “<Installation Path>middleware\Oracle\_BI1\network\admin”. The tnsnames.ora file should contain the data-source connection details used in the connection pool of the RPD.
- b. Log on to Oracle Enterprise Manager.
  - i. Go to **Business Intelligence** menu located on the left hand side of the screen. Select **Core application** as shown in the figure below.
  - ii. Go to **Deployment** located on the last tab as shown in the figure below.
  - iii. Select **Repository** tab.
  - iv. Click **Lock and Edit Configuration**.
  - v. Go to the section **Upload BI Server Repository**. Browse and select the repository (<Installation Dir>/Solvencyll/repository/Insurance.rpd).
  - vi. Enter the repository password as “Password123”. Enter the same password in “Confirm Password” as well.
  - vii. Go to **BI Presentation Catalog** section below “Upload BI Server Repository”.
  - viii. Edit the catalog path and remove SampleAppLite (Only in case of first time installation) from the end of the catalog path section and enter Insurance as the name of the new catalog folder. Make sure that the folder path is “\$ORACLE\_INSTANCE/bifoundation/OracleBIPresentationServicesComponent/\$COMPONENT\_NAME/catalog”
  - ix. Click **Apply**.
  - x. Click **Activate Changes** as shown in the figure below.
  - xi. Click **Overview** tab as shown in the figure below.
  - xii. Click the **Restart** button as shown in the image below.
  - xiii. In case the all the services have not been started please click on the start button again, and check if all the services have been started (100% in the system components pie chart indicates that all the services are up and running).

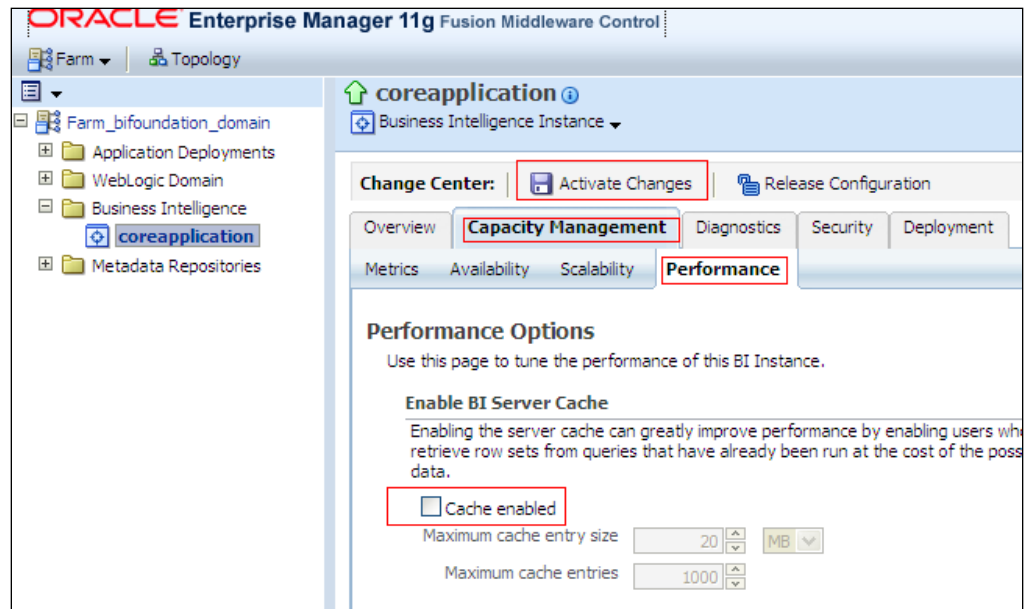




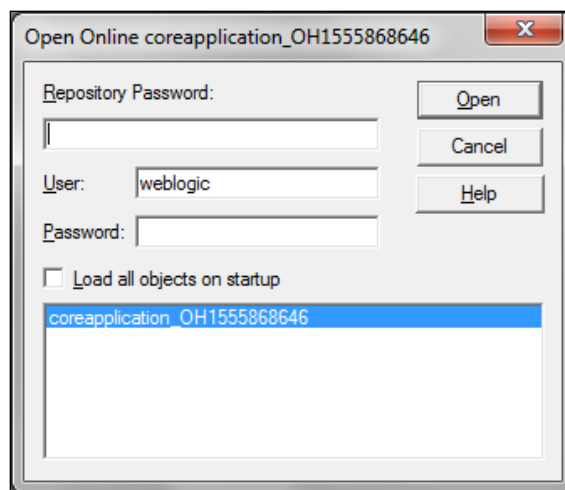
- xiv. Open the NQSConfig.INI file, found at <Installation Path>\instances\instance1\config\OracleBIServerComponent\coreapplication\_obis1.  
Modify the parameter value of MW\_UPDATE\_ROLE\_AND\_USER\_REF\_GUIDS from NO to YES.
- xv. Add the tag <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs> within “<Catalog>” tag in the instanceconfig.xml file available in “<Installation Path>\instances\instance1\config\OracleBIPresentationServicesComponent\coreapplication\_obips1” folder. Restart the services by clicking the **Restart** button under Overview tab as shown in the figure above.
- xvi. Open the NQSConfig.INI file, found at <Installation Path>\instances\instance1\config\OracleBIServerComponent\coreapplication\_obis1.  
Modify the parameter value of MW\_UPDATE\_ROLE\_AND\_USER\_REF\_GUIDS from YES to NO.
- xvii. Remove the tag <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs> within “<Catalog>” tag in the instanceconfig.xml file available in “<Installation Path>\instances\instance1\config\OracleBIPresentationServicesComponent\coreapplication\_obips1” folder. Restart the services by clicking on the Restart button under Overview tab. As shown in the image above.
- xviii. Disable the cache (cache can be enabled once the setup is moved to the production mode and on the basis of institutions’ needs). To disable the cache,
  - Click the “**Capacity Management**” tab in the Oracle Enterprise Manager. Select the “**Performance**” tab.
  - Click **Lock and Edit Configuration** button.
  - Un-check the option “**Cache enabled**”.

- Click **Apply** and then click on the **Activate Changes** button. Restart the servers by clicking the **Restart** button under Overview tab.

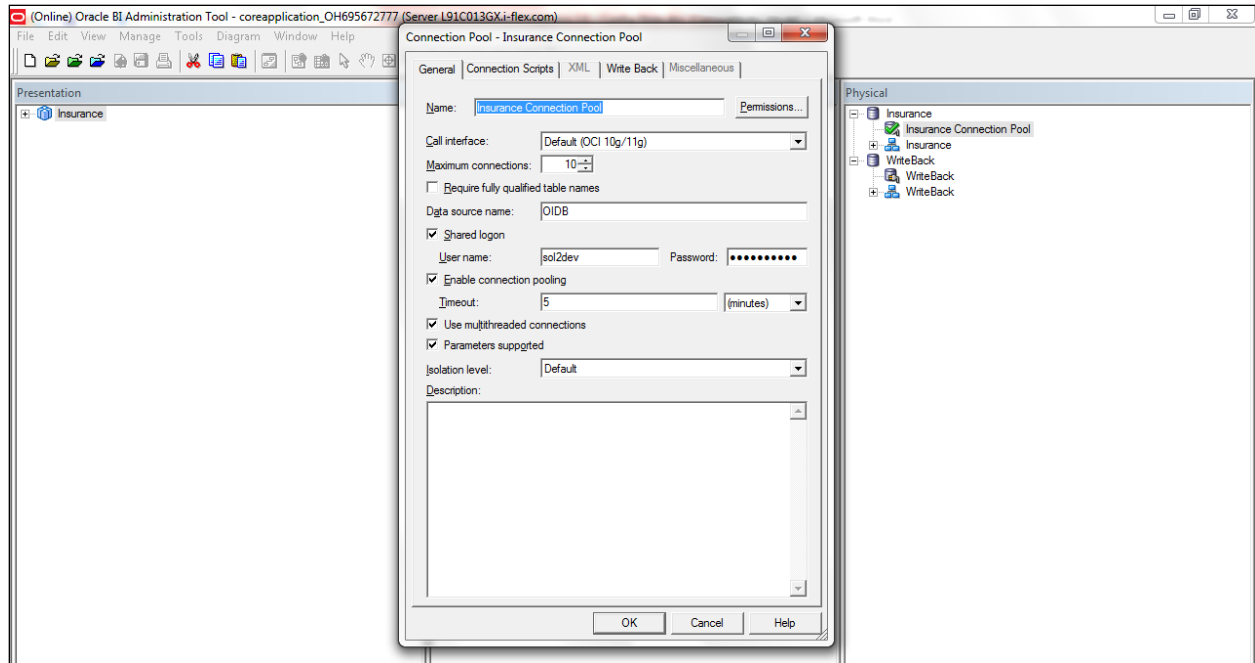
Refer to the figure below.



- c. Open the RPD by clicking the **Start Menu > All Programs > Oracle Business Intelligence > BI Administration**.



- d. Provide the User as weblogic and the password provided at the time of installing OBI 11g and the Repository Password as "Password123" .
- e. Change the data source name, user name and password of all the connection pools available in the rpd to the Oracle TNS Name, database schema name and password respectively, as shown in the figure below.



- f. Close the RPD after saving it.

### 4.2.3 Dashboard/Answer Reports (from any client machine i.e. windows machine):

- a. Start the BI services (if not started) :
- b. Start OBIEE Catalog Manager (Start → Programs → Oracle Business Intelligence → Catalog Manager.)
- c. Select **Open Catalog** from File menu.
- d. Select the option **Online** for Type.
- e. Type the link for presentation services i.e. Oracle Interactive Dashboard link. For example, <http://URL:PORT/analytics/saw.dll?>
- f. Provide the Administrator user Id and password that is, weblogic and the password provided at the time of installing OBI 11g. Click **OK**
- g. Click the **shared folder** in the left hand pane.
- h. Select the **Un-archive option** from File Menu.
- i. Select the archive file *Oracle Insurance Solvency II Analytics 2.0 – Analytics.catalog* (<Installation Dir>/SolvencyII/catalog/) and click **OK**.
- j. Restart the BI services.

### 4.2.4 Installation of Images (Only for New Installation) :

- a. Uncompress the file “*Oracle Insurance Solvency II Analytics 2.0 - Images.zip*” from “<Installation Dir>/SolvencyII/Images/” and copy all the images to the following folders:
  - i. <OBIEE Installation Path>\
   
Oracle\_BI1\bfoundation\web\app\res\ls\_bla\fp\images

ii. *<OBIEE Installation*

*path>\user\_projects\domains\bifoundation\_domain\servers\bi\_server1\*  
*tmp\WL\_user\analytics\_11.1.1\7dezj\war\res\s\_bla\p\images*

- b. Restart the BI services.

#### 4.2.5 Write Back Configuration

- a. Copy the file SetComment.xml from “<Installation Dir>/Solencyll/dashboardconfiguration/” and paste it in the folder :  
*<OBIEE Installation Path>*  
*instances\instance3\bifoundation\OracleBIPresentationServicesComponent\corea*  
*pplication\_obips1\analyticsRes\customMessages*. In case customMessages folder  
 is not present then create the same at the mentioned location.
- b. Open the instanceconfig.xml file for editing from location *<OBIEE Installation Path>\instances\instance3\config\OracleBIPresentationServicesComponent\corea*  
*pplication\_obips1* and add the text *<LightWriteback>true</LightWriteback>* under  
*<ServerInstance>* tag.
- c. For giving Write Back privileges to User
  - Login into OBI Presentation Service Website
  - Follow this link : Setting / Administration / Manage Privileges
  - Grant the privilege “Write Back to database” to the permitted group

#### 4.2.6 Application Roles Configuration

- A. Open a command prompt and navigate to the folder “*<OBIEE Installation Path>/oracle\_common/common/bin/*”.
- B. Execute the following command:  
*wlst <Installation Dir>/Solencyll/dashboardconfiguration//CreateAppRoles.py*  
*<username> <password> t3://<obiee server's ipaddress>:<port no.>*  
  
*e.g. wlst*  
*d:\SolencyllBI\_build\dist\SolencyllBI\Solencyll\dashboardconfiguration\*  
*CreateAppRoles.py weblogic weblogic123 t3://10.184.202.205:7001*
- C. This script will create two application roles namely : Manager and Analyst
- D. Manager application role has read only access to all the dashboard pages.  
 Manager application role has read and write access to enter comments for each  
 report in the dashboard.
- E. Analyst application role has read only access to the following dashboard pages :
  - i. Life Underwriting Risk
  - ii. Non Life Underwriting Risk

- iii. Health Underwriting Risk
- iv. Market Risk
- v. Counterparty Default Risk
- vi. Operational Risk
- vii. Premium
- viii. Claims
- ix. Reinsurance

F. Analyst application role has only read access to the comments for each report in the dashboard.

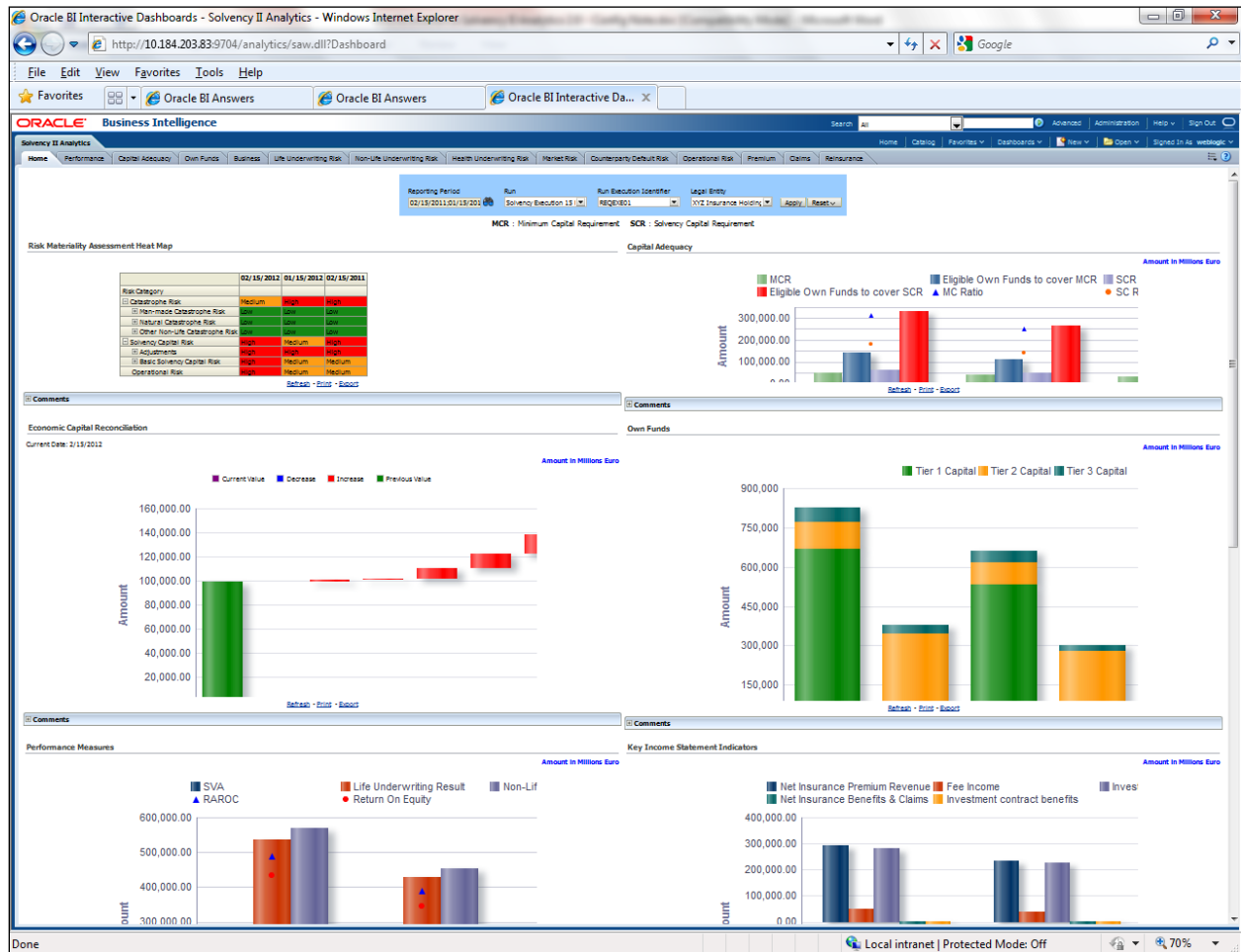
G. For giving Write Back privileges to Application Roles

- Login into OBI Presentation Service Website
- Follow this link : Setting / Administration / Manage Privileges
- Grant the privilege “Write Back to database” and “Manage Write Back” to the Manager Role as shown in figure below
- Deny the privilege “Write Back to database” to Analyst Role as shown in figure below

<b>Write Back</b>	Write Back to Database	<a href="#">Authenticated User, BI Author Role, BI Consumer Role, Manager</a> <a href="#">Denied: Analyst</a>
	Manage Write Back	<a href="#">BI Administrator Role, BI Author Role, BI Consumer Role, Manager</a>

## 4.3 Post-installation verification steps

- a. Log into Analytics and verify if the screen looks like the figure shown below.



- b. Click each of the dashboard links, and verify if all the links are visible.
- c. Open the RPD, and verify if the RPD can be accessed online with the weblogic user.

In case of issues during or after installation please use support portal link :

<https://flexsupp.iflexsolutions.com/GSTOOLSSL/eng/>



Installation Manual

August 2013

Oracle Insurance Solvency II Analytics v2.0.0.0.0 Product

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