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# Oracle Insurance Insight

# Oracle Insurance Insight Administration Guide

version 7.0

Part number: E22075-01

December 2010

*Oracle Insurance Insight Administration Guide*

*Version 7.0*

*Part Number: E22075-01*

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# 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.

## Intended Audience

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

## Related Documents

For more information, refer to the following documents:

- *Oracle Insurance Insight Release Notes*
- *Oracle Insurance Insight Installation Guide*
- *Oracle Insurance Insight Warehouse Palette Guide*
- *Oracle Insurance Insight Implementation Guide*
- *Oracle Insurance Insight User Guide*

# 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 Business Intelligence Server Administration Guide*
- *Oracle Business Intelligence Presentation Services Administration Guide*
- *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*

# 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 assistance with Oracle Insurance Insight, please log a Service Request using My Oracle Support at https://support.oracle.com.

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Chapter 1

# OII Administrator's Duties

Oracle Insurance Insight (OII) is a comprehensive business intelligence system created exclusively for the Property and Casualty (P&C) insurance industry that provides the following advantages:

- Consolidates data from multiple, disparate source systems to provide a strategic enterprise-wide view across operating units.
- Provides an underlying data model constructed specifically for the P&C insurance industry.
- Delivers information management, reporting and advanced analytics to end-users through the OBIEE interface.
- Accommodates all P&C lines of business and all states/provinces in the U.S. and Canada.

## Basic Administrative Tasks

The OII system administrator is responsible for performing the following basic duties outlined in the table below. These tasks will be performed using components of the OBIEE and separate OII applications.

*Table 1: Basic Administrative Tasks*

| Task | Performed Using this Application: |
|---|---|
| • Add users to the OII Repository<br>• Edit the OII Repository | • OBIEE Administration Tool |
| • Add users to groups | • OBIEE's Presentation Services Administration page |
| • Manage Load Manager | • Load Manager is a job scheduler designed to perform automated data loads into OII.<br>• Load Manager is a separate Java based application that must be installed, configured, and run outside of the OBIEE system.<br>• Instructions for installing and setting up Load Manager can be found in the *Oracle Insurance Installation Guide*.<br>• For information on configuring and using Load Manager, refer to*Chapter 5: Using Load Manager*. |
| • Create an ODBC Data Source to the OBIEE Server | • **Control Panel>Administration Tools>Data Sources** on your desktop |

## ADMINISTRATOR PREREQUISITES

Any system administrator should meet the following prerequisites:

- Strong Technical Skills
- Understanding of business data
- Understanding of OBIEE
- Understanding of OII

Chapter 2

# Managing the OII Repository

This chapter describes the following OII administrative duties:

- Logging into the OBIEE Administration Tool
- Adding new users to the OII Repository
- Removing objects from the OII Repository

## Opening the OII Repository

To open the OBIEE Administration Tool:

1. From the Start menu select **Oracle Business Intelligence > Administration.**

   The Administration interface workspace opens:

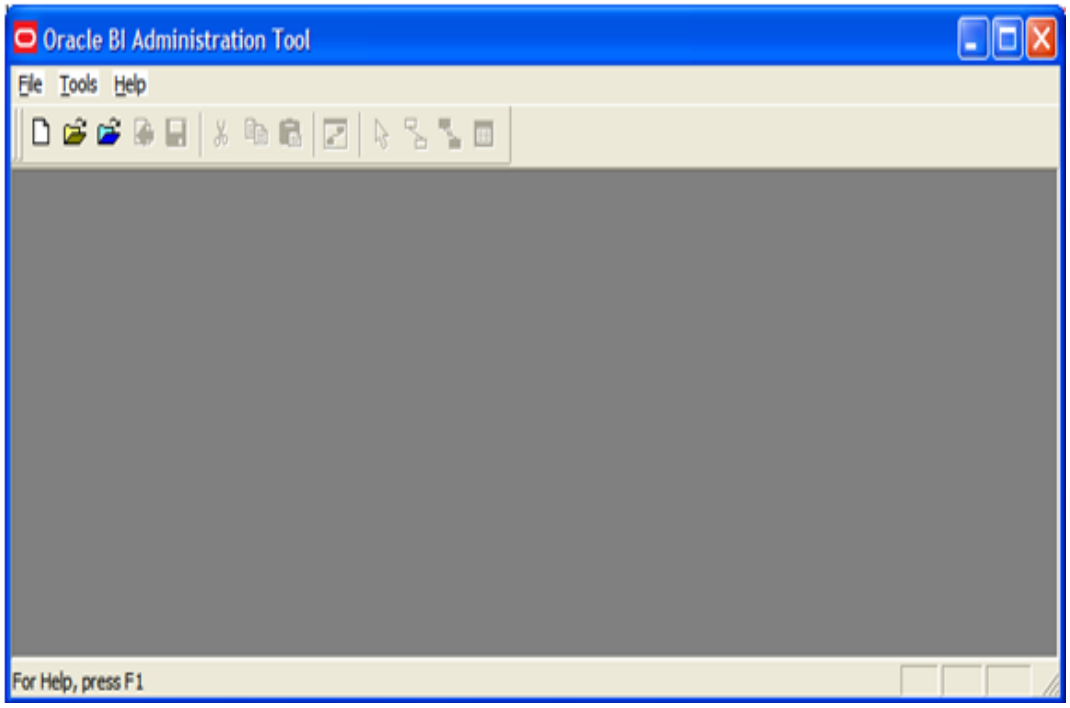


*Figure 1: OBIEE Administration Workspace*

2. Select **File>Open** from the menu or click on the Open icon. The login dialog box opens.

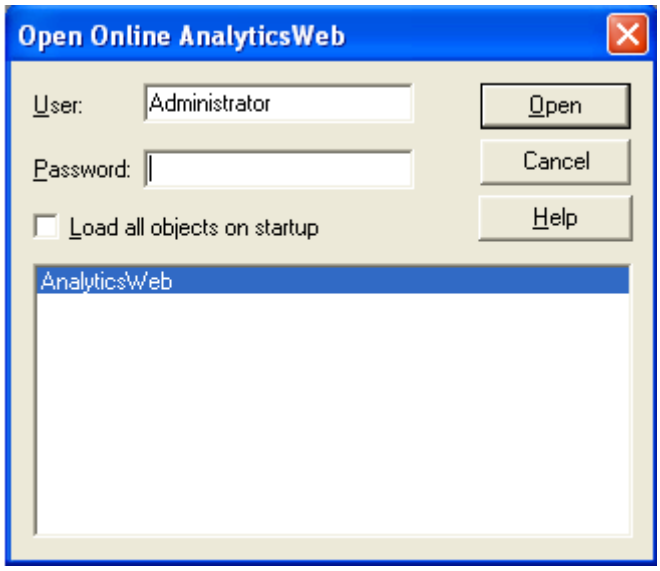


*Figure 2: Open OII Repository (AnalyticsWeb)*

3. Enter the Administrator ID and password
4. Select "AnalyticsWeb" and press **OK**. The OII repository opens.

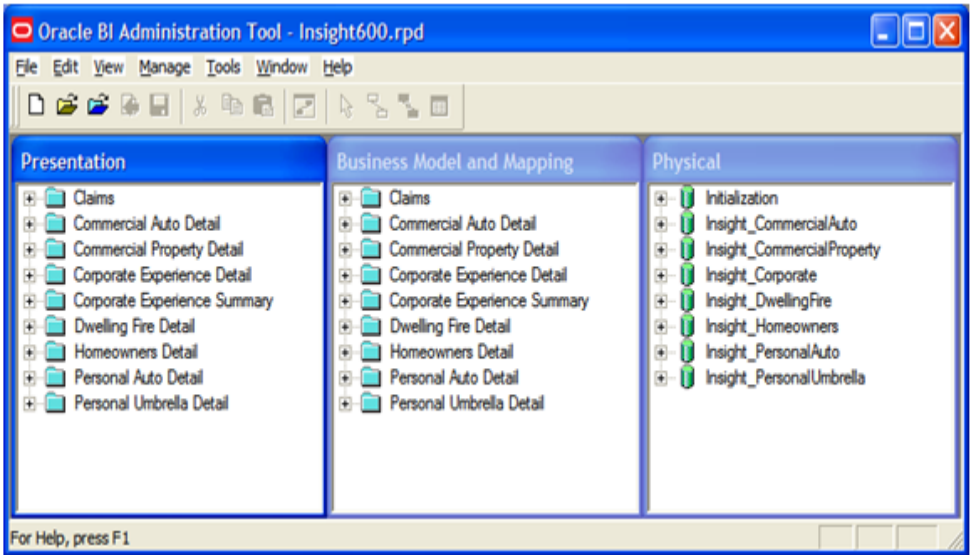


*Figure 3: OII Repository in the OBIEE Administration Tool*

The OII Repository contains three layers.

- **Presentation Layer** – this pane represents the physical structure of the OII repository. This layer shows each mart in the repository. When you expand a mart it will display a list of all metrics and fields contained in the mart. This is the layer you will be most concerned with and will be the one that you edit directly.
- **Business Model and Mapping layer** – this pane represents the logical structure of the information in the OII repository

- **Physical Layer** – this pane represents the physical structure of the data sources to which the OBIEE Server submits queries.

# ADDING A NEW USER TO THE OII REPOSITORY

To add a new user to the OII Repository:

1. From the top menu, select **Manage>Security.** The Security Manager appears.

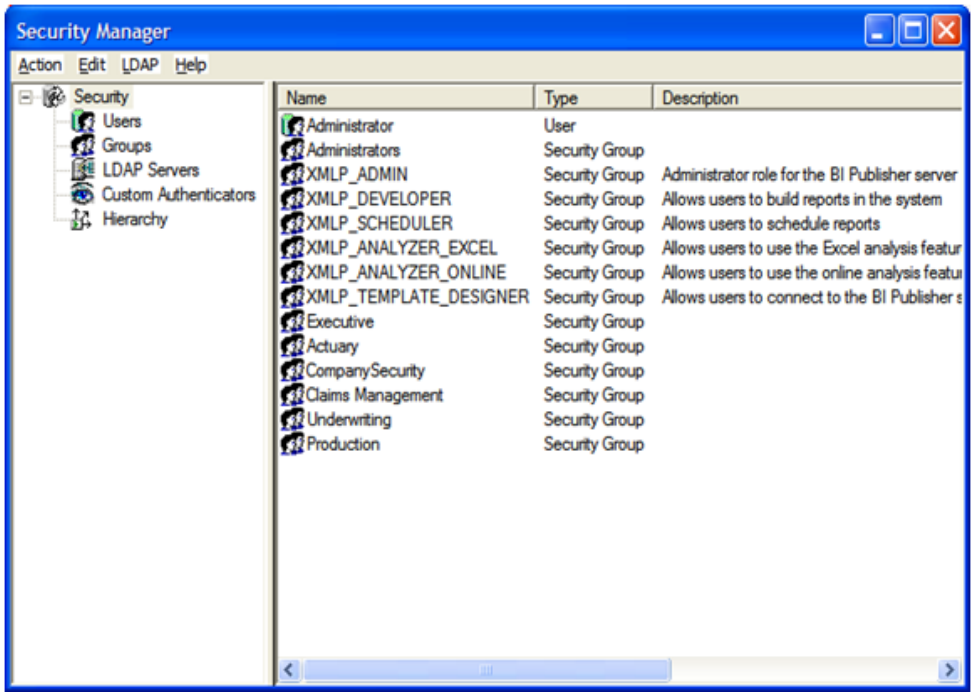


*Figure 4: Security Manager*

2. From the menu, select **Action>New>User**. The Add New User screen opens:

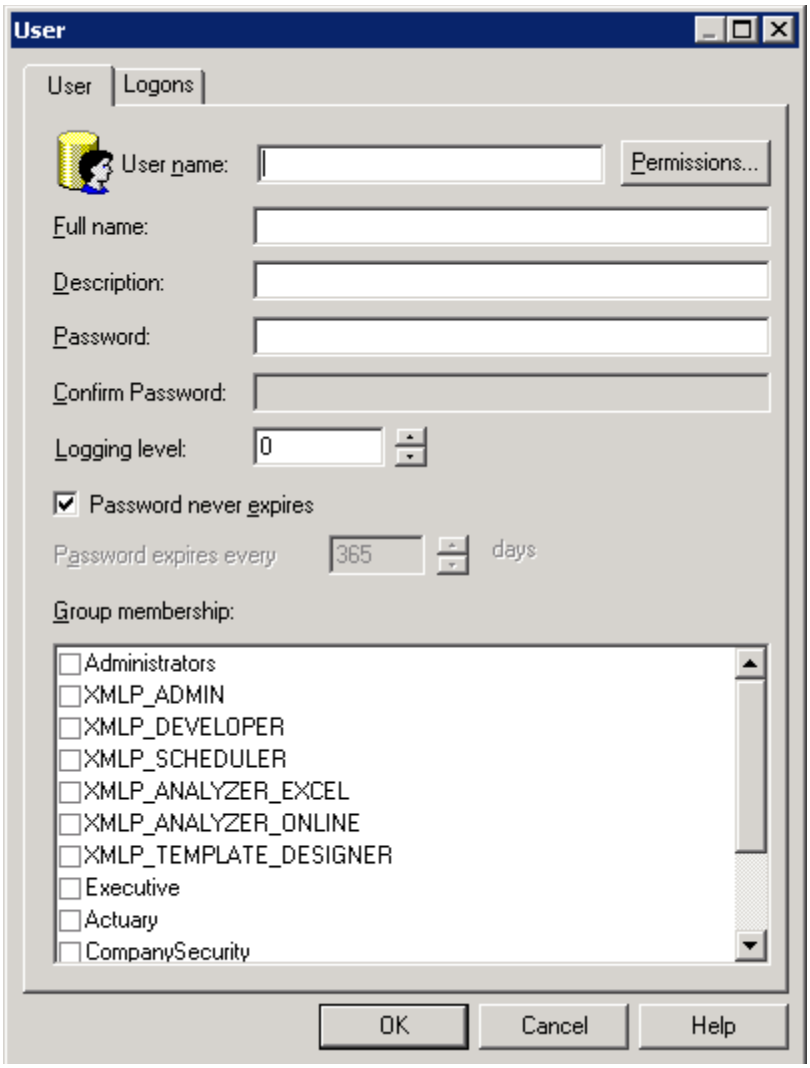


*Figure 5: Add New User Screen*

3. Enter the information at the fields on this screen as required.
4. Check the appropriate group(s) that you want to assign to the user. There are five OII groups:
    - Actuary
    - Claims Management
    - Executive
    - Production
    - Underwriting

**Note** The administrator can also add users to groups within OII.

5. Click **OK** after you have entered the user information and selected the groups.

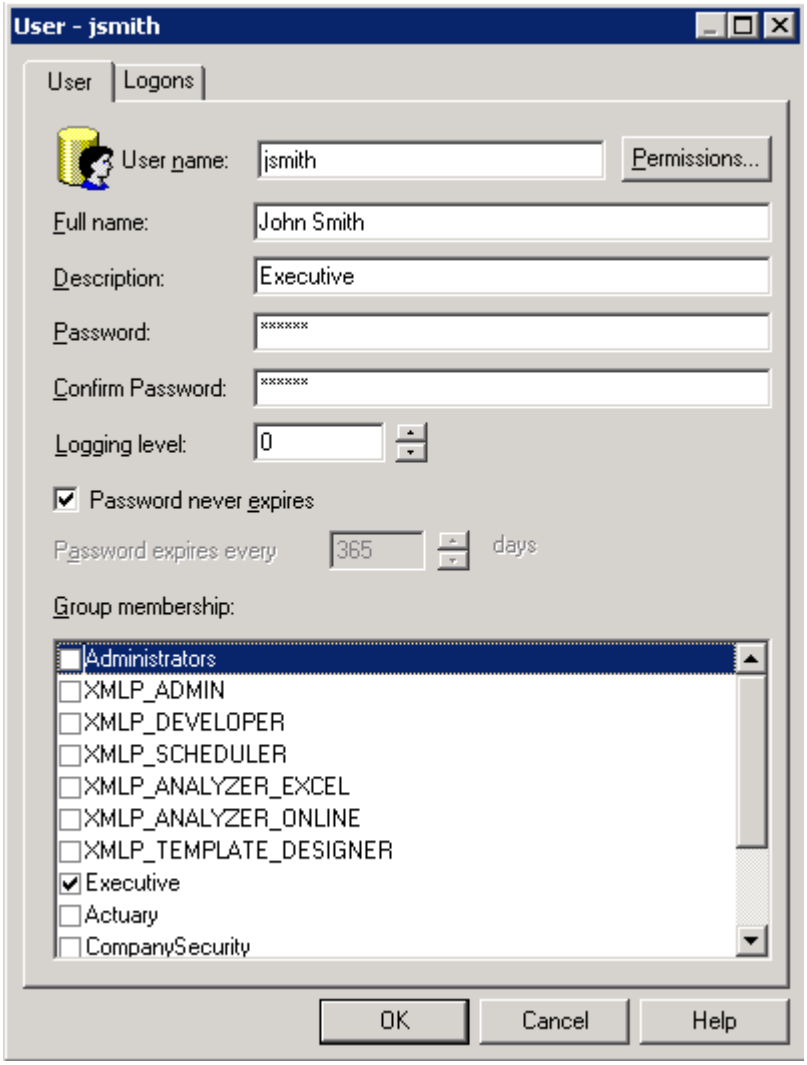


*Figure 6: New User Information*

6. Close the Security Manager.
7. On the top menu, click on the **Checkin** icon (the one with the red arrow).
8. Save the OII repository.
9. Close the OII repository and exit from the Administration Tool.
10. Open the Oracle Business Intelligence screen for OII and login as the Administrator.
11. Log out of the OBIEE.
12. Log into OBIEE as the new user.
13. Log out.

The new user has now been added to the OBIEE.

# EDITING A USER

To edit a user in the OII Repository:

1. From the top menu, select **Manage>Security.** The Security Manager appears.

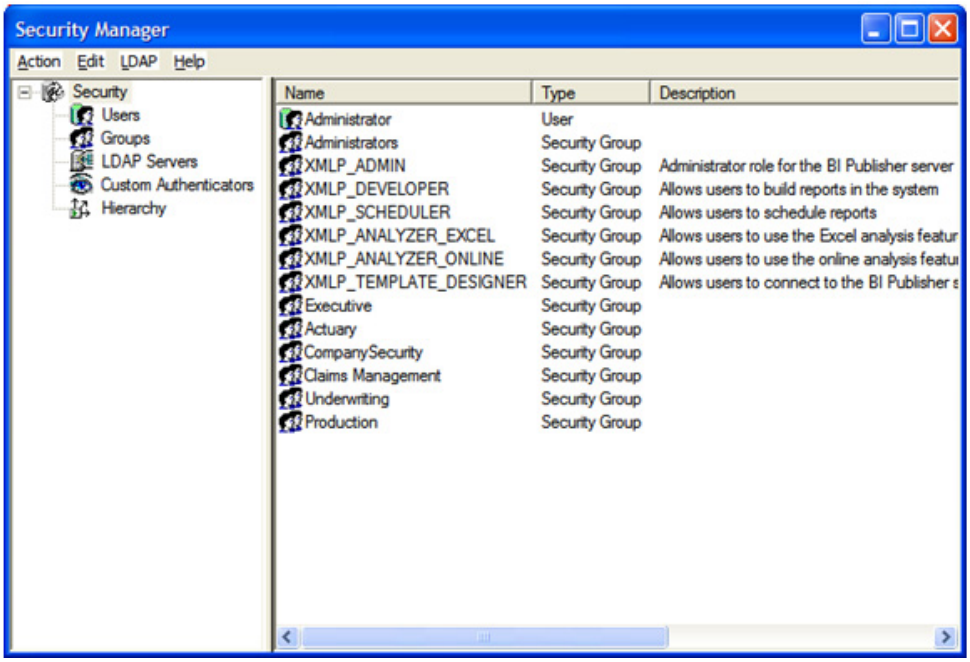


*Figure 7: Security Manager*

2. In the left frame click on the Users icon. The accounts in the frame of the right will be sorted alphabetically by user.
3. Double-click on a user. A dialog box will appear and ask you if you want to check out the selected user.
4. Select **Yes** and the **User** box opens:

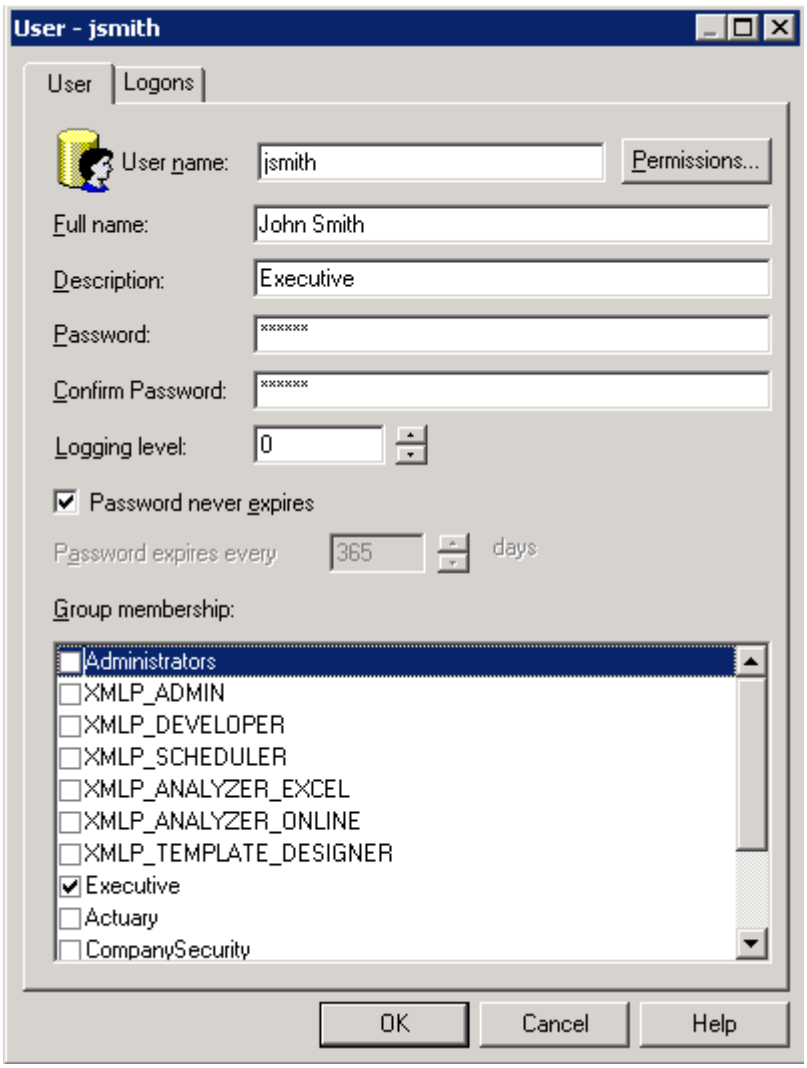


*Figure 8: Edit User*

5. Edit the user's information and click the OK Button when you are through.

   The checkout icon on the top menu will become active.

6. On the top menu, click on the **Checkin** icon (the one with the red arrow).
7. Save the OII repository.
8. Close the OII repository and exit from the Administration Tool.
9. Open the Oracle Business Intelligence screen for OII and login as the Administrator.

# REMOVING A METRIC OR FILTER FROM THE REPOSITORY

On occasion, a need may arise to remove metrics or filter fields from the OII repository that are not applicable to users. The administrator can remove any metrics or fields from the Presentation Layer of the OII Repository so that they will not appear within the OBIEE.

**Note** The removal of any metric or filter from the OII Repository is permanent!

Before you delete any object from the Presentation Layer, ALWAYS make a backup of the OII Repository.

## To Delete a Metric or Filter:

1. Expand the mart and category containing the metric or filter you want to delete.
2. Highlight the metric or filter and select **Edit>Delete** from the top menu.

   A dialog box will appear asking if you want to check the item out.
3. If you're sure then click **Yes** in the dialog box.

   The item will be deleted and the Checkin icon on the menu will become active.
4. Click on the **Checkin** icon.
5. Click the **Save** icon.
6. Close the repository and exit the Administration Tool.
7. Log into OBIEE and go to the mart that contained the metric or filter. The deleted item will no longer appear in the interface.

Chapter 3

# Managing User Accounts in OBIEE

Once a user has been added to the OII Repository, the administrator will need to add them to the same group within OBIEE Presentation Catalog through the OBIEE Presentation Services Administration page within the OBIEE GUI.

## Opening the OBIEE Administration Page

1. Log into OBIEE as an Administrator.

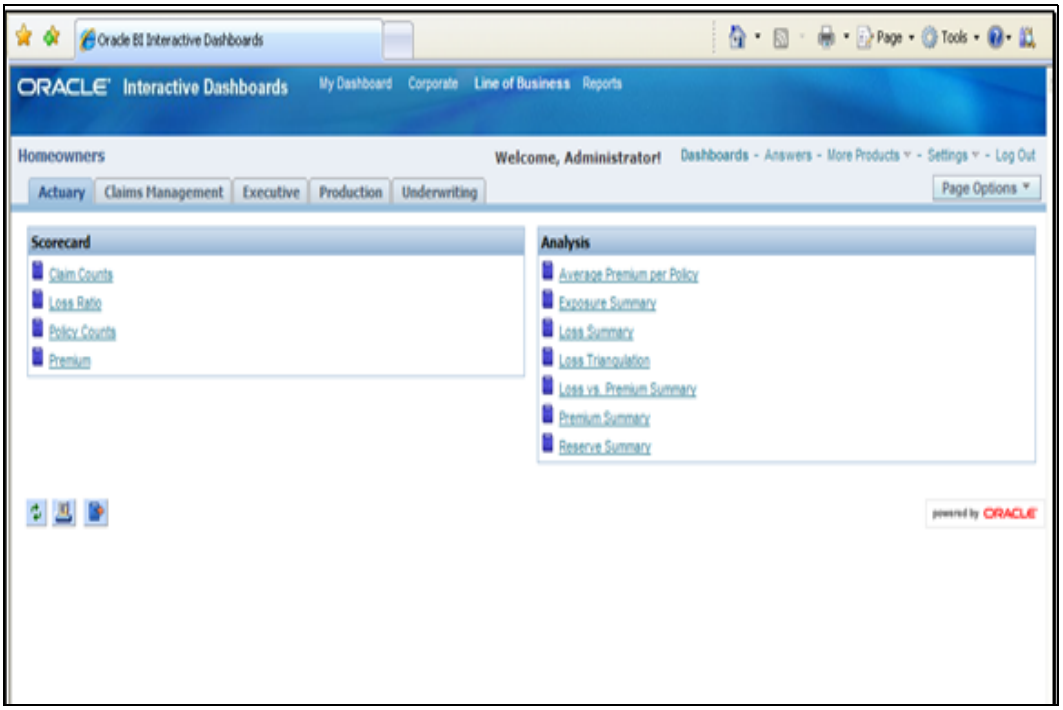


*Figure 9: The OBIEE Home Page*

2. Click on **Settings>Administration**.

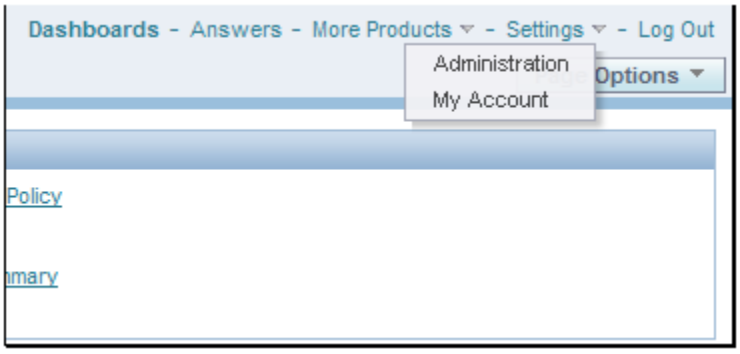


*Figure 10: Administration Menu in OBIEE*

The OBIEE Presentation Services Administration page opens:

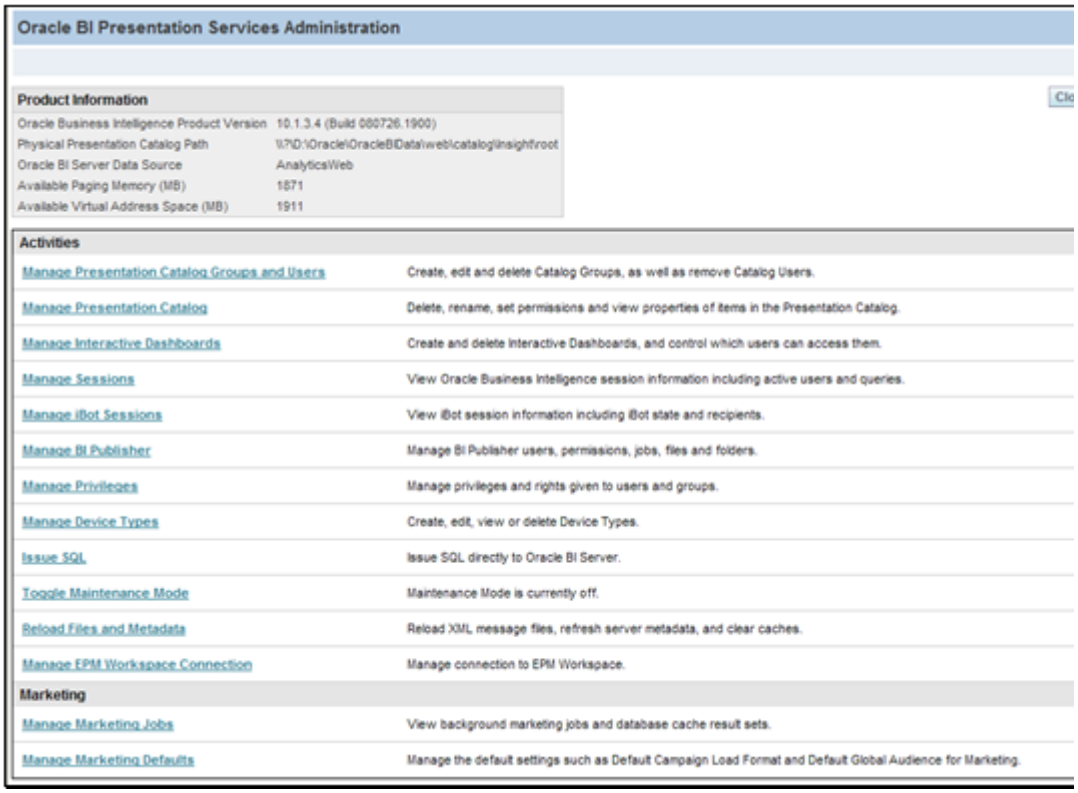


*Figure 11: OBIEE Presentation Services Administration*

This screen allows you to manage various aspects of the OBIEE interface. For our intents and purposes, this document only discusses the features that relate to managing user accounts.

For a comprehensive discussion of the OBIEE Presentation Services Administration screen, refer to the *Oracle Business Intelligence Presentation Services Administration Guide*.

# ADDING A MEMBER TO A GROUP

Users can be assigned to one or more of the five OII groups when they are initially added to the OII repository using the Oracle Administrative Tool. After the user is created, you can use the Administrative link in OBIEE to assign them to other groups.

To add a member to a group, follow these instructions:

1. The new user account needs to be logged in at least once prior to this step so that it would be available in the Presentation Catalog Users List. Just login as that user with the matching password and logout. Then login as the Administrator again.
2. On the OBIEE Presentation Services Administration screen, click the Manage Presentation Catalog Groups and Users link under the **Activities** section.
3. The **Presentation Catalog Security: Groups and Users** screen opens.

*Figure 12: Groups and Users Screen*

This screen lists the five OII groups along with the Administrator group. To view all current users and groups in alphabetical order, click on the Show users and groups link:

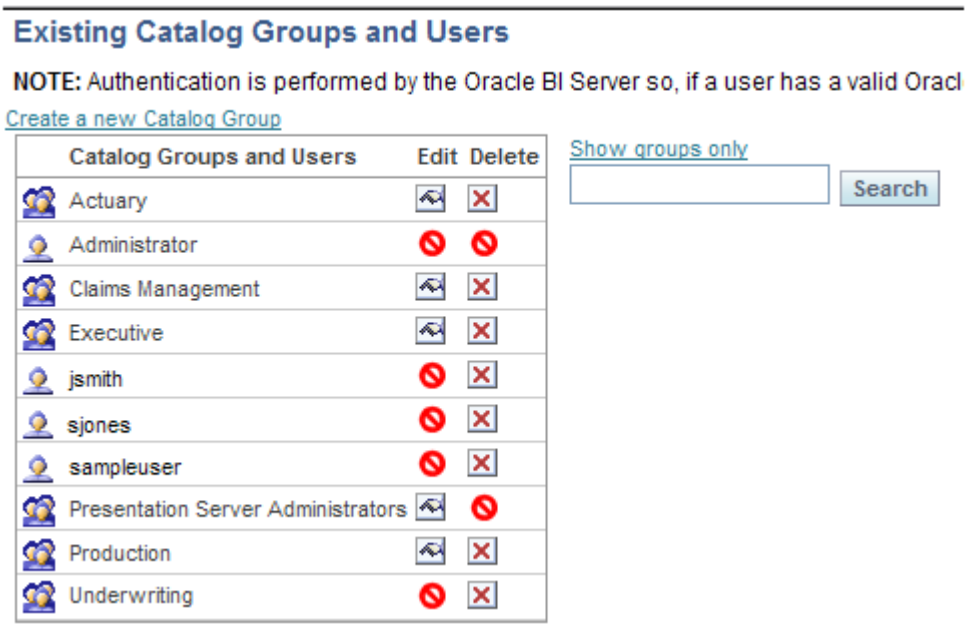


*Figure 13: All Current Users and Groups in the System*

4. Click on the icon in the row of the group that you want to add a user to. For this example we will add a member to the Underwriting group.
5. The **Edit Catalog Group** screen opens.

   The Group Membership section of the screen lists all of the current members of the selected group. In the figure below the Underwriting group has two other groups as members: Claims management and Executive. This means that all members of these two groups also belong to Underwriting.

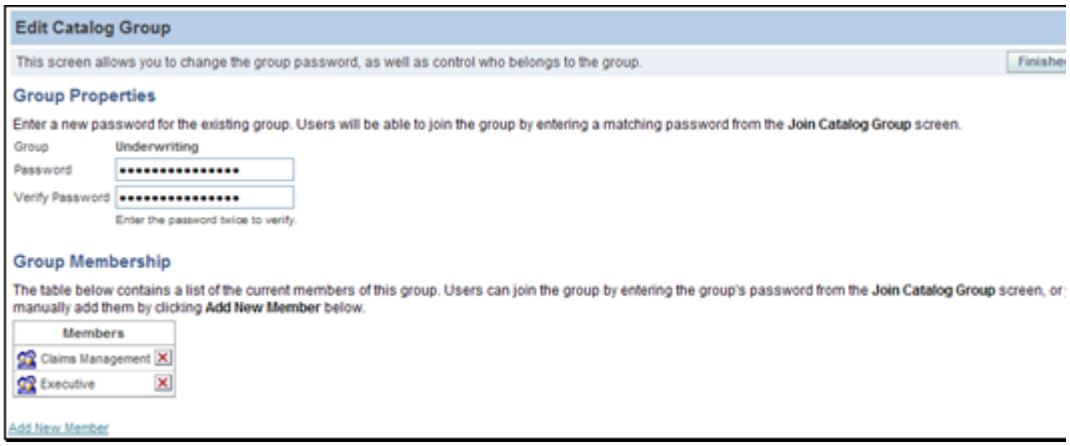


*Figure 14: Edit Catalog Group Screen*

6. Click on the Add New Member link.

The **Add Member to Group** screen opens.

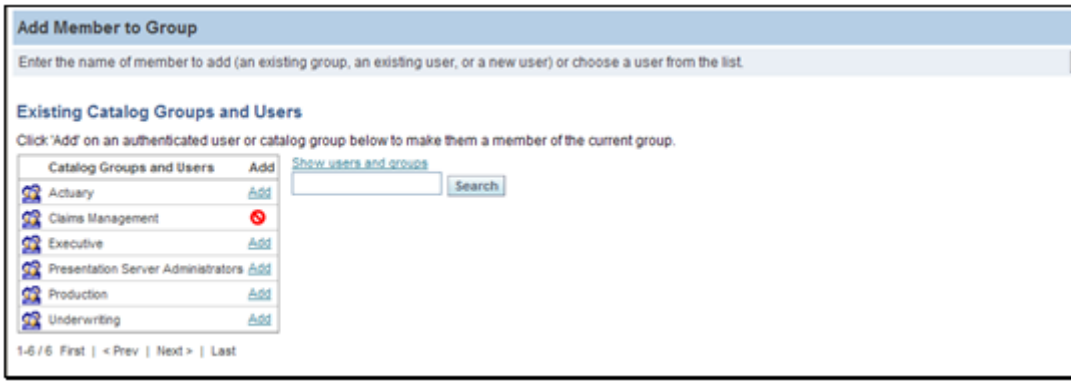


*Figure 15: Add Member to Group Screen*

7. Click on the Add link in the row of the group or user that you want to add to the group.

   You will be returned to the **Edit Catalog Group** screen. Under the **Group Membership** section you will see the new user under the list of members.

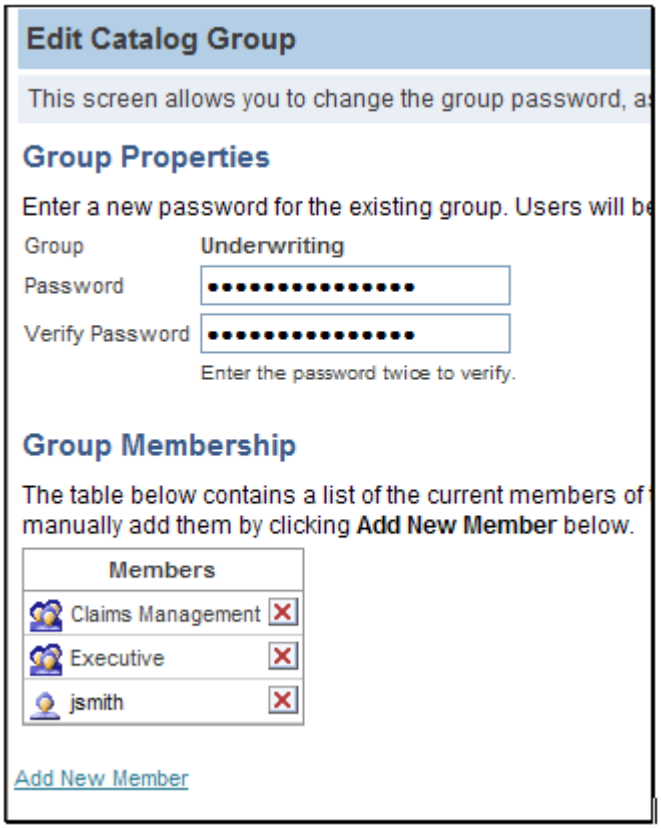


*Figure 16: User is Added to the Group*

8. Click the **Finished** button in the right hand corner of the screen. You will be returned to the **Presentation Catalog Security: Groups and Users** screen.
9. Click on the **Finished** button on this screen. You will be returned to the **OBIEE Presentation Services Administration Screen**.
10. Click **Close Window** to close this window.

# DELETING A MEMBER OF A GROUP

***To delete a member from a group, follow these instructions:***

1. Select the Manage Presentation Catalog Groups and Users link on the **OBIEE Presentation Services Administration** screen to open the **Presentation Catalog Security: Groups and Users** screen.

*Figure 17: Presentation Catalog Security: Groups and Users Screen*

2. Click on the icon in the row of the group that contains the user that you want to delete. The **Edit Catalog Group** screen opens.
3. Under the Group Membership section of the screen, click the icon in the row on the member. The screen will refresh and the user will be removed from the list.
4. Click the **Finished** button. You will be returned to the **Presentation Catalog security: Groups and Users** screen.
5. Clicked the **Finished** button on this screen. You will be returned to the **OBIEE Presentation Services Administration Screen**.
6. Click **Close Window** to close this window.

Chapter 4

# Creating an Oracle ODBC Data Source

As part of the post-installation configuration steps for OBIEE (see the *OII Installation Guide*) you must create two separate Oracle ODBC data sources to connect to the OBIEE Server:

- **ODBC Data Source 1:**The first ODBC data source must be named **Insight700** with a user name **OII_DM**.
- **ODBC Data Source 2:** The second ODBC data source must be named **Insight700Config** with a user name of **OII_SYS**.

**Note** Oracle Database Client 11g must be installed on your machine in order to create an Oracle ODBC data source.

## STEP 1: CREATE A CLIENT CONNECTION

1. Open Net Manager by selecting:

   **All Programs >Oracle – OraClient11g_home1>Configuration and Migration Tools>Net Manger**

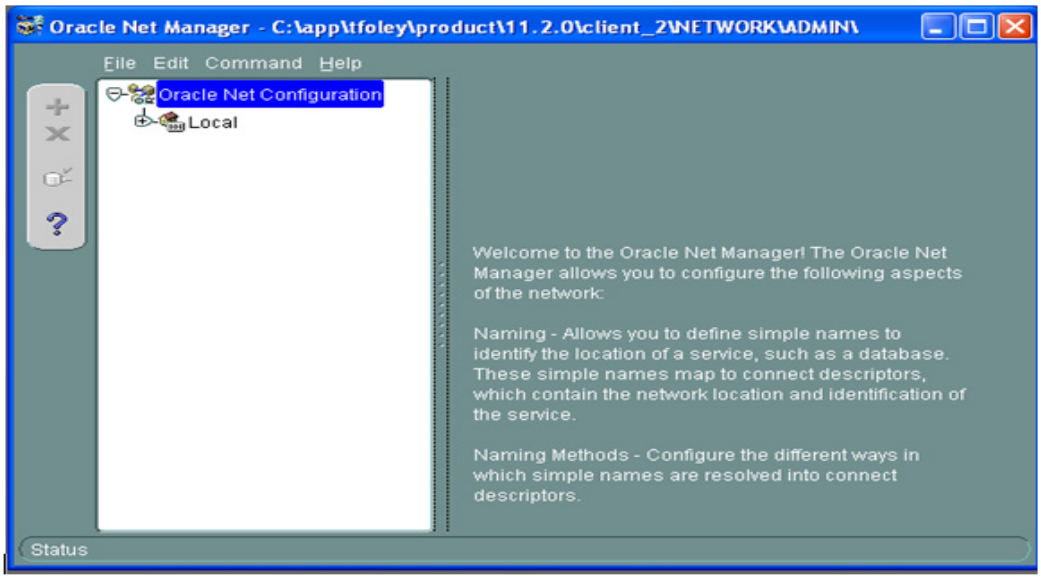


*Figure 18: Oracle Net Manager Welcome Screen*

2. In the menu on the left, expand the **Local** and then the **Service Naming** node.
3. Highlight the **Service Naming** node and click the '+' button to the left of the menu tree. The **Net Service Wizard: Welcome** screen displays.

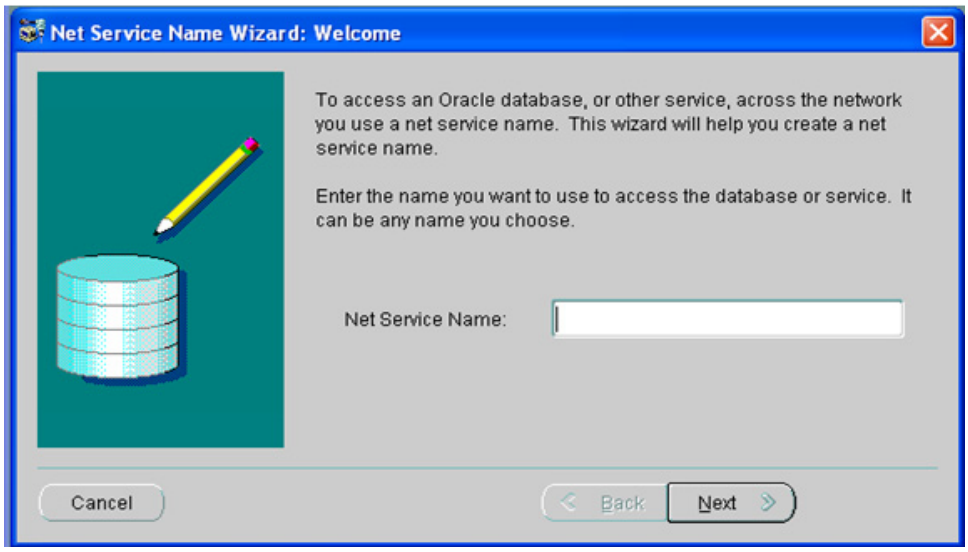


*Figure 19: Welcome Screen*

4. Enter a **Net Service Name.** The name may be any name you choose.
5. Click on **Next**. The **Protocol** screen opens.

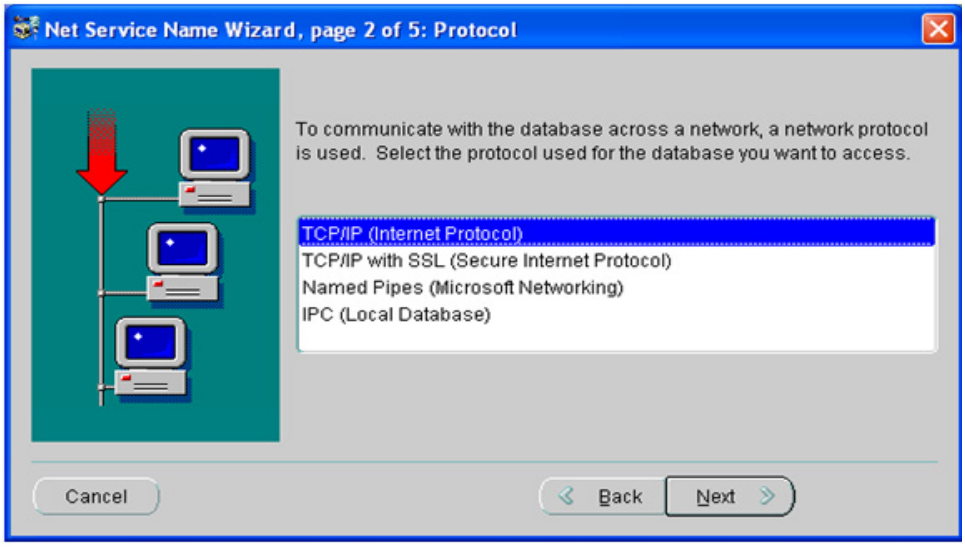


*Figure 20: Protocol Screen*

6. Keep the default selection ("TCP/IP (Internet Protocol)") and click on **Next**. The **Protocol Settings** screen opens.

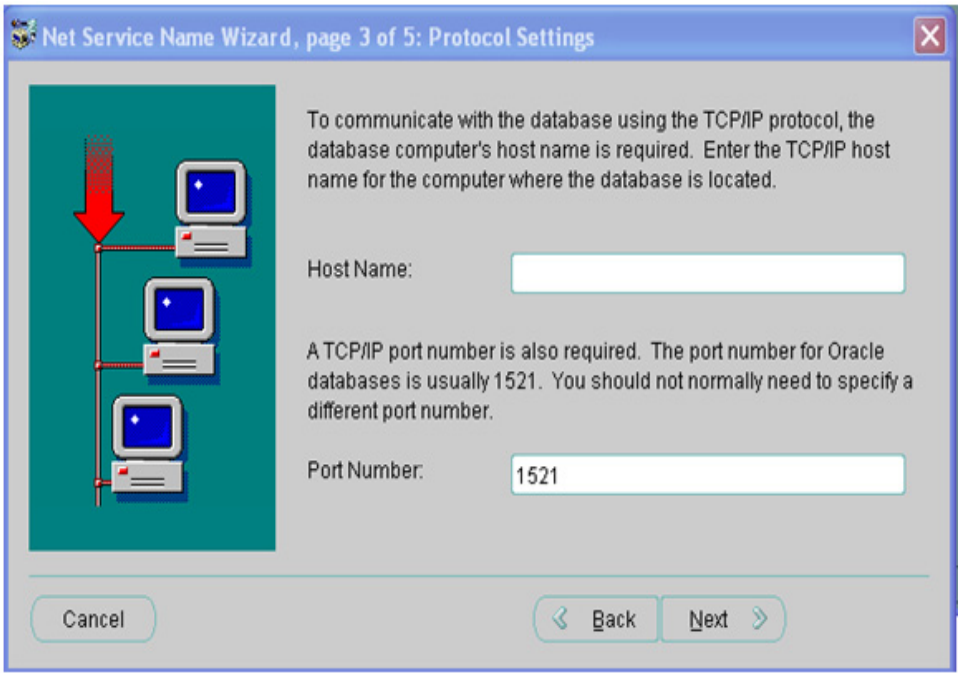


*Figure 21: Protocol Settings Screen*

7. Enter the following settings on the Protocol Settings screen:
   a. **Host Name:** The TCP/IP host name where the database server is located.
   b. **Port Number:** Keep **1521** as the default. This is the standard default for Oracle databases.
8. Click **Next**. The **Service** screen opens.

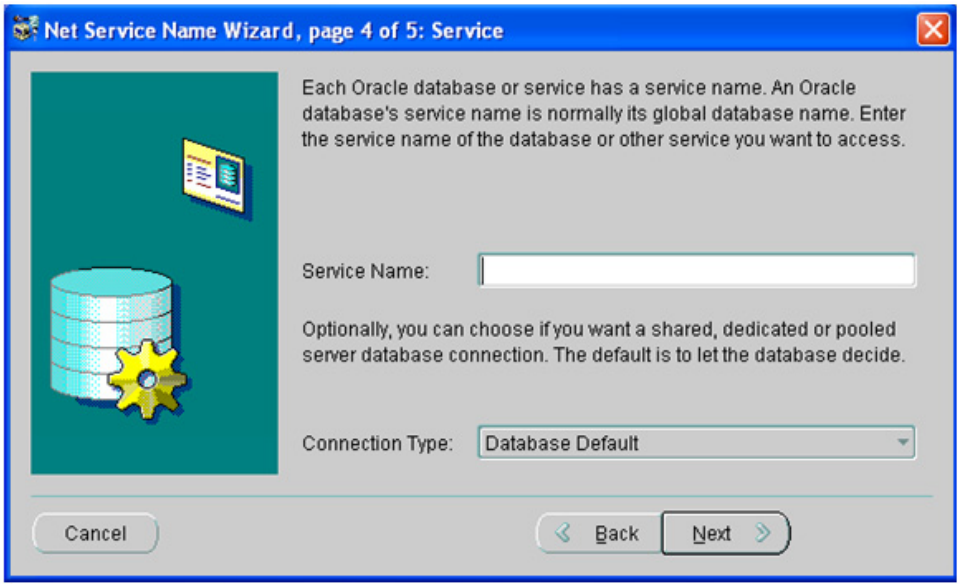


*Figure 22: Service Screen*

9. Specify the following settings on the **Service Name** screen:
   a. **Service Name**: The Service Name name may be any name you choose. In this example we will call it **OII_CONNECT**.
   b. **Connection Type**: Accept **Database Default** (this is the default selection).
10. Click on **Next**. The **Test** screen opens.

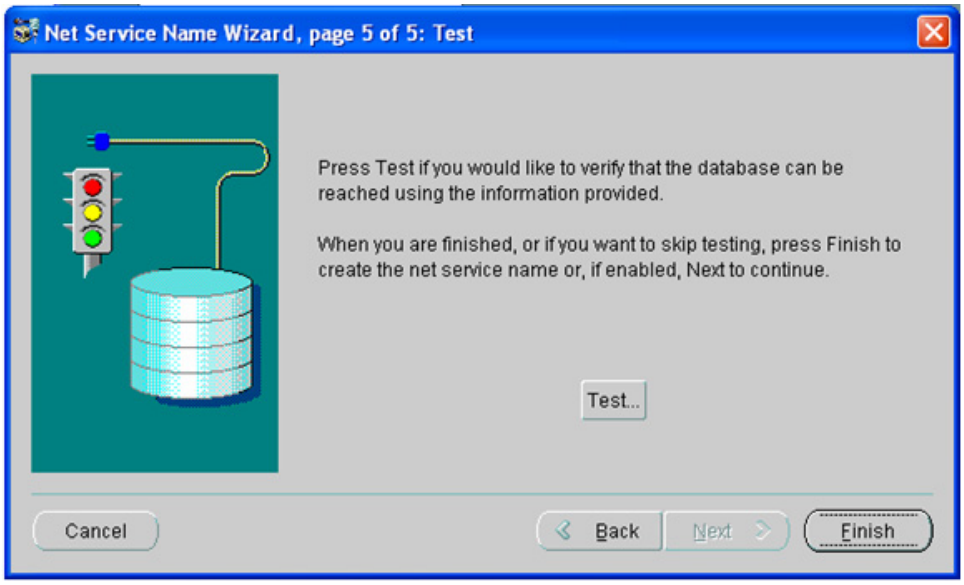


*Figure 23: Test Screen*

11. Click on the **Test** button to test the database connection. The **Connection Test** screen will appear and confirm whether or not the connection was achieved with the information that you provided on the previous screens.
    - If the connection failed then click the **Close** button on the **Connection Test** screen and verify the information that you provided on the previous screens was correct.
    - If the connection was a success, click the **Close** button to close the **Connection Test** screen.

12. Click on **Finish** on the Test screen. The main Net Manager screen opens and the connection you just created (**OII_CONNECT**) will appear under the **Service Naming** folder.

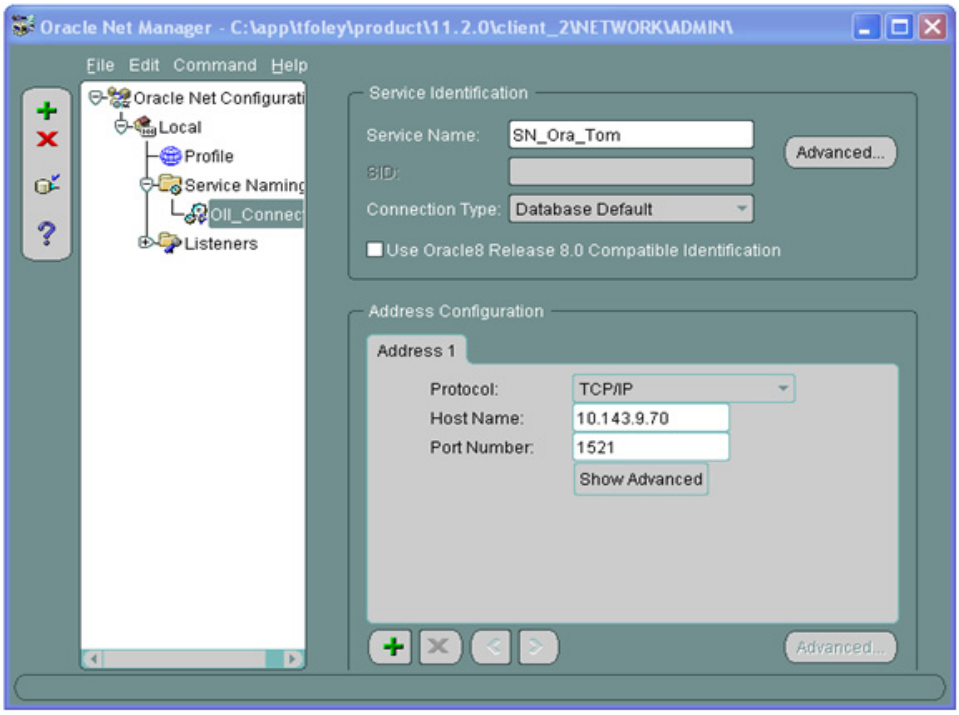


*Figure 24: The New Connection Appears Under Service Naming Folder*

13. Click on **File>Save Network Configuration** to save the connection.

14. Select **File>Exit** to close the screen.

# STEP 2: CREATE AN ORACLE ODBC DATA SOURCE

Ymust create two separate Oracle ODBC data sources to connect to the OBIEE Server:

- **ODBC Data Source 1:**The first ODBC data source must be named **Insight700** with a user name **OII_DM**.
- **ODBC Data Source 2:** The second ODBC data source must be named **Insight700Config** with a user name of **OII_SYS**.

Follow these steps to create a data source:

1. Select **All Programs>Oracle – OraClient11g_home>Configuration and Migration Tools>Microsoft ODBC Administrator**.

   The **ODBC Data Source Administrator** window will display.

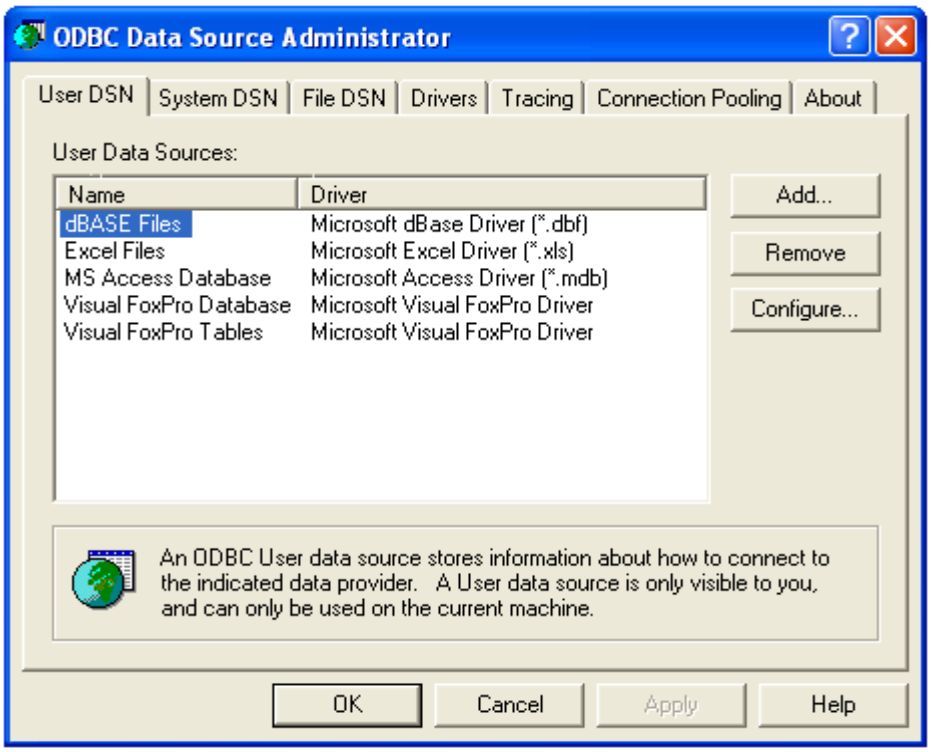


*Figure 25: ODBC Data Source Administrator Screen*

2. Click on the “System DSN” tab.
3. Click on the **Add** button. The **Create New Data Source** screen appears.

4. Scroll down and select **Oracle in OraClien11g_home1.**

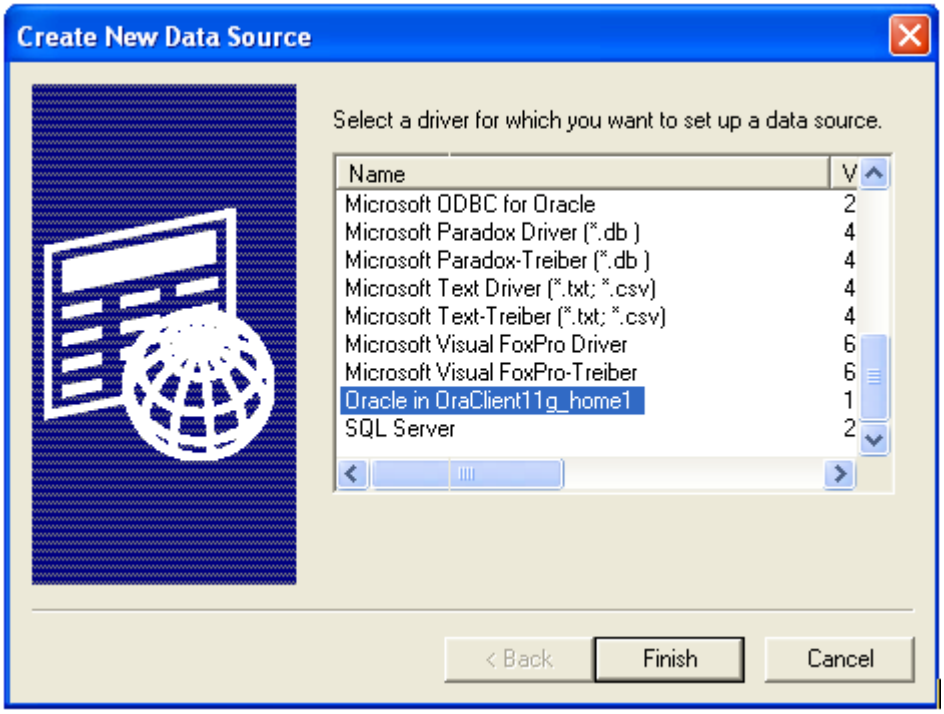


*Figure 26: Select "Oracle in OraClient11g_home1"*

5. Click on **Finish**. The **Oracle ODBC Driver Configuration** window opens.

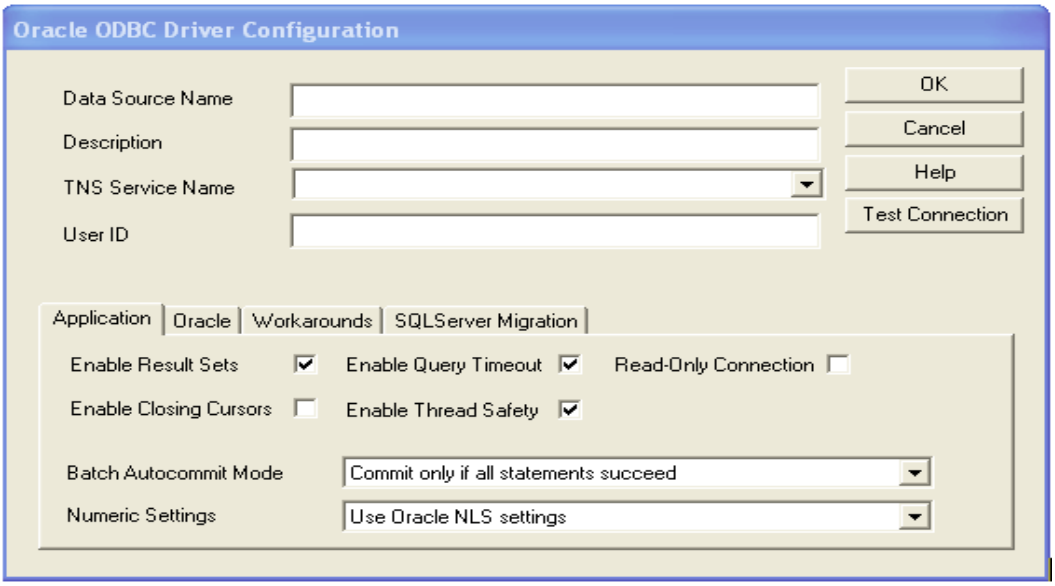


*Figure 27: Driver Configuration Screen*

6. Enter the following information in this window:
   a. **Data Source Name:** Enter **Insight700** as the Data Source Name.
   b. **Description:** Enter an optional descirption.

c. **TNS Service Name:** Select the appropriate "TNS Service Name" from the drop-down list that you created in the previous section.

d. **User ID:** Enter **OII_DM** as the name of the schema.

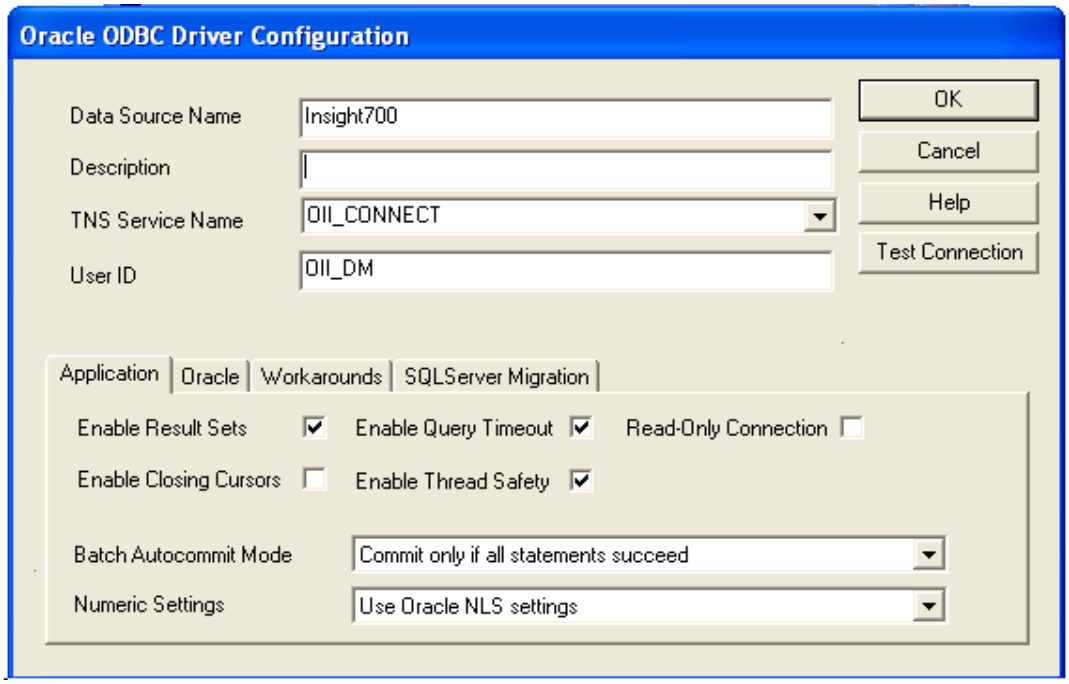


*Figure 28: Driver Configuration Screen Entries*

7. Click on the **Test Connection** button. The **Oracle ODBC Driver Connect** window will display.

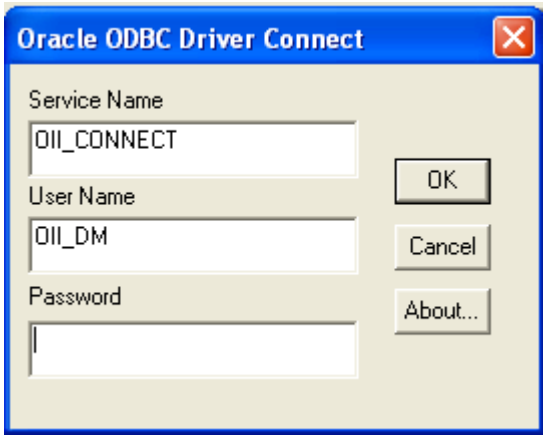


*Figure 29: Driver Connect Window*

8. Type in the correct password.
9. Click on **OK**. A "Connection successful" message box will display.
10. Click on **OK** to close this message box.

11. Click on **OK** on the **Oracle ODBC Driver Connect** window. The new data source is listed in the System DSN tab of the ODBC Data Source Administrator window.

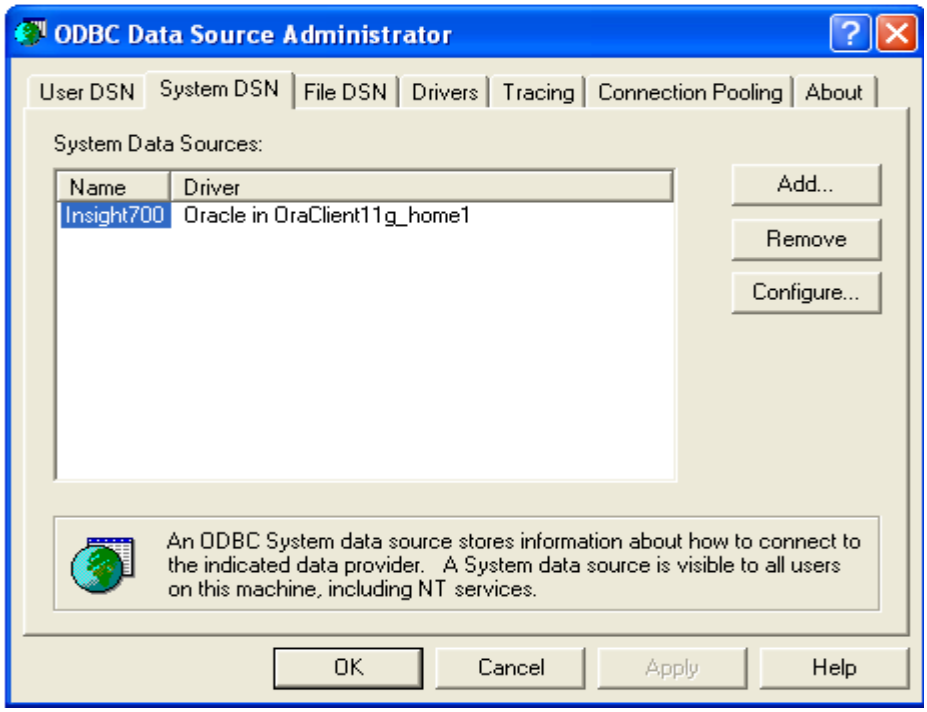


*Figure 30: New ODBC Data Source*

12. Repeat the steps in this section to create a second ODBC data source connection with:

    - **Data Source Name:** Insight700Config
    - **User ID:** OII_SYS

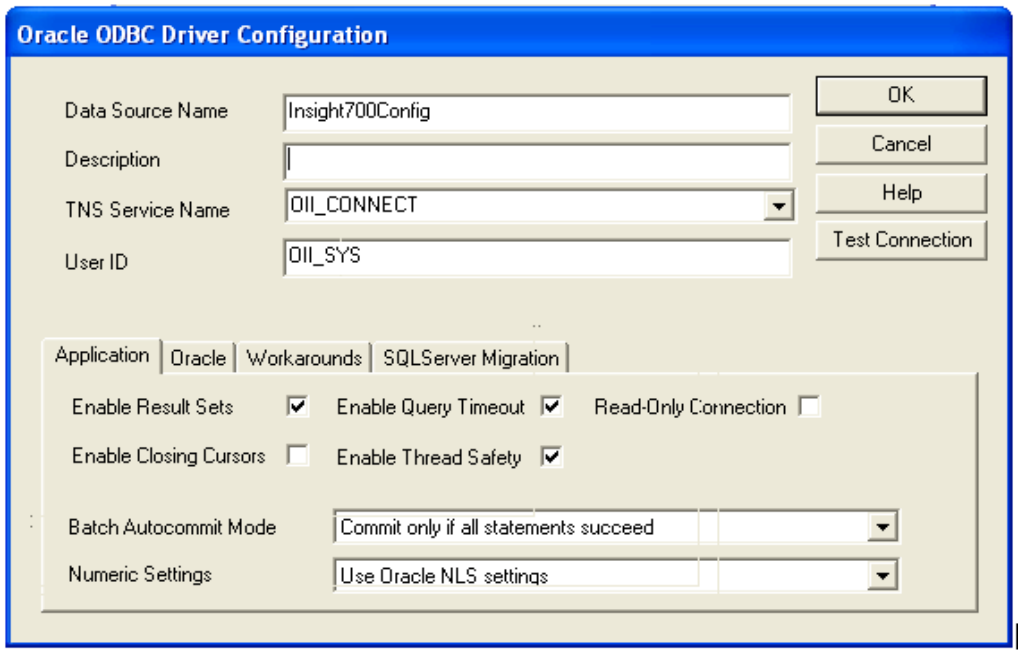


*Figure 31: ODBC Data Source*

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