

Upgrade Utility Guide

Oracle Financial Services:

Anti-Money Laundering | Fraud | Trading Compliance | Broker Compliance
| Energy and Commodity Trading Compliance | Enterprise Case
Management | Know Your Customer | FATCA Management

Release 6.2.3

May 2014



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About this Guide

This guide provides comprehensive instructions for upgrading the Oracle Financial Services Enterprise Case Management (OFSECM) product to Oracle Financial Services Financial Crime and Compliance Management (OFSFCCM) which includes Oracle Financial Services Enterprise Case Management (OFSECM) and Oracle Financial Services Know Your Customer (herein referred to as OFSKYC).

This chapter focuses on the following topics:

- Who Should Use this Guide
- Scope of this Guide
- Where to Find More Information
- Conventions Used in This Guide

Who Should Use this Guide

The *Upgrade Guide* is designed for use by the Application Installers and Administrators. Their roles and responsibilities include the following:

- **Application Installer:** This user installs and configures the Oracle Financial Services Alert and Enterprise Case Management and the client-specific solution sets at a deployment site.
- **System Administrator:** This user configures, maintains, and adjusts the utility and is usually an employee of a specific Oracle Financial Services client. The System Administrator maintains user accounts and roles, archives data, and loads data feeds.

Scope of this Guide

This guide provides instructions for upgrading and configuring the Oracle Financial Services Alert and Enterprise Case Management system, subsystem components, and the related third-party software needed to operate the system.

How this Guide is Organized

The *Upgrade Guide* includes the following chapters:

- Chapter 1, *Introduction* describes the Upgrade Utility and details the activities that occur prior to installing OFSFCCM.
- Chapter 2, *Upgrade Activities* provides step-by-step instructions for upgrading OFSFCCM
- Chapter 3, *Post Installation* explains the steps that must be followed after successfully installing OFSFCCM.
- Chapter 4, *Uninstalling OFS FCCM* explains the steps that must be followed to uninstall OFSFCCM.
- Chapter 5, *Deploying OFSECM Analytic Reports and Threshold Analyzer* explains how to integrate AnalyticReports and the Threshold Analyzer with OFSFCCM .

Where to Find More Information

The OFSFCCM installation is done in three stages. The names of three installation guides are listed below:

- *Installation Guide - Stage 1*: This installation guide provides instructions for installing Oracle Financial Services Scenarios and Data Ingestion & Detection Algorithms to support Behavior Detection.
- *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*: This installation and configuration guide provides instructions for installing and configuring OFSAAL.
- *Installation Guide -Stage 3*: This installation guide provides instructions for installing and configuring OFSFCCM .

For more information about Oracle Financial Services FCCM, refer to the following documents:

- *Installation Guide - Stage 1*
- *Administration Guide*
- *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide, Release 7.3*
- *Oracle Financial Services Analytical Applications Infrastructure User Manual, Release 7.3*

To find more information about Oracle Financial Services application and our complete product line, visit our web site at www.oracle.com/financialservices.

Conventions Used in This Guide

Table 1 lists the conventions used in this guide.

Table 1. Conventions Used in this Guide

Convention	Meaning
<i>Italics</i>	<ul style="list-style-type: none">● Names of books, chapters, and sections as references● Emphasis
Bold	<ul style="list-style-type: none">● Object of an action (menu names, field names, options, button names) in a step-by-step procedure● Commands typed at a prompt● User input
Monospace	<ul style="list-style-type: none">● Directories and subdirectories● File names and extensions● Process names● Code sample, including keywords and variables within text and as separate paragraphs, and user-defined program elements within text
<Variable>	<ul style="list-style-type: none">● Substitute input value

This chapter provides an overview of the OFSFCCM Upgrade Utility and information about system hardware and software requirements, and the pre-installation and installation activities. This chapter includes the following topics:

- About the Upgrade Utility
- Environment Details
- Upgrade Checklist

About the Upgrade Utility

The OFSFCCM 6.2.0.1 Upgrade Utility upgrades existing OFSFCCM 6.1.1 to OFSFCCM 6.2.0.1 with respect to preserve data related to the investigations being performed on alerts or cases. For example, actions performed, narrative added, documents attached, and so on. It describes the pre-requisites and process of migrating the data from one version to the other without losing existing data. For additional features contained in 6.2.0.1 as compared to 6.1.1, refer to the OFSFCCM 6.2.0.1 *Release Notes*.

The primary objectives of this utility are as follows:

- Removing redundant OFSECM 6.1.1 data.
- Upgrading OFSBDP
- Upgrading OFS FCCM

Note: The Upgrade Process has been divided into two separate parts. The information of these two parts has been divided into the following guides:

- OFSFCCM Upgrade Utility 6.1.1
- OFSFCCM Upgrade Utility 6.2

You must follow the steps provided in the *Upgrade Guide*, Release 6.1.1 and then follow the steps provided in *Upgrade Guide*, Release 6.2 sequentially to upgrade to OFSFCCM 6.2. If you are currently on OFSECM 6.1.1, you should start the Upgrade process by following the steps provided in *Upgrade Guide*, Release 6.2.

Environment Details

The OFSFCCM solution is installed using the hardware and software environments described in the following table:

Table 2. Environment Details

Back-End Environment	Hardware	Software
OEL 5.5 or RHEL 5.3 /5.5 or Sun Solaris 10 -64 Bit or AIX 6.1	64-bit x 86 architecture	Oracle 11g R2 (11.2.0.2.0) - 64 bit
		Java 1.6.0_[latest update] - 64 bit
		Websphere 7.0.0.[latest update]-64 bit or Weblogic 10.3.[latest update] - 64 bit
		OFSBDP 6.2
		OFSAAI 7.3 with all release patches
		OBIEE 11.1.1.6.7
Front-End Client Access		Software
Windows XP Service Pack 3 / Windows 7		Java Plug-in 1.6.0_[latest update]
		Microsoft Internet Explorer 8.0 / 9.0
		Microsoft Office 2007
		Adobe Reader 8.0 or later

Upgrade Checklist

Table 3 lists the Installation Checklist to be completed for installing the OFSFCCM solution. Follow the checklist in the sequence mentioned below and perform the listed activities.

Table 3. Installation Checklist

Step No.	Task	Done
General		
1	Check the OFSFCCM 6.2 <i>Release Notes</i> and <i>Read Me</i> document for any additional steps to be performed on OFSBDF or OFSAAI. Note: For more details, contact Oracle support.	
2	Ensure that the required hardware and software are installed and configured. For more information on environment details refer to <i>Environment Details</i> , on page 2.	
OFSBDF 6.2		
3	Ensure that the OFS FCCM 6.1.1 is installed and configured. Obtain the unix userid and password used for OFSBDF 6.2 installation Note: Make sure that \$FIC_HOME is not the same as <OFSBDF_Installed Directory>.For more information, refer to the <i>Installation Guide - Stage 1</i> .	

Table 3. Installation Checklist

Step No.	Task	Done
4	<p>Note down the following OFSBDF schemas with a valid User ID and Password and Role Names:</p> <ul style="list-style-type: none"> ● Business schema (business_schema_owner) ● Market schema market_schema_owner) ● Alert Management Schema (mantas_schema_owner) ● Web Schema (web_user) ● KDD Schema (kdd_schema_owner) ● KDD MNR Schema (tools_user) ● DB UTIL Schema (db_util_user) ● Algorithm Schema(server_user) ● Ingest Schema Ingest schema Owner) ● FSDF Schema (fsdf_schema_owner) ● KYC Schema kyc_schema_owner) ● Case Management Schema (case_schema_owner) <p>Note: Refer to the <OFSBDF Installed Directory>/database/db_tools/mantas_cfg/db_variables.cfg file for schema names written against the variables provided in brackets of the respective schemas:</p> <ul style="list-style-type: none"> ● Algorithm Role (kdd_algorithm_role) ● Analyst Role (kdd_analyst_role) ● Data Loader Role (data_loader_role) 	
5	<p>Take a back up of the following atomic schemas:</p> <ul style="list-style-type: none"> ● Alert Management Schema ● Case Management Schema <p>For more details, refer to the <i>Installation Guide- Stage 1</i>.</p> <p>Note: The backup must be kept until the successful installation of the solution.</p>	
OFSAAI 7.3		
6	<p>Ensure that OFSAAI 7.3 is installed and configured. For more details, refer to the <i>Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3</i>.</p> <p>Note: Make sure that \$FIC_HOME is not the same as <OFSBDF_Installed Directory>.</p> <p>Contact Oracle Support for installing any additional patches on top of OFSAAI, if required.</p>	
7	<p>Ensure that the ftpshare path of the OFSAAI Application Layer (APP), Data Base Layer (DB), and Web Application Layer (WEB) layers are configured and have recursive read/write/execute permission for the user installing OFSFCCM. For more details, refer to the <i>Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3</i>.</p> <p>Note: If you have multiple installation of FCCM products then keep different ftpshare path for each installation.</p>	
8	<p>Ensure to configure OFSAAI WEB / APP / DB server as part of OFSAAI Installation.For more information, refer to <i>Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3</i>.</p>	
9	<p>Ensure that the OFSAAI application server is up and running before installing the OFSFCCM Application Layer.</p>	
10	<p>Note the OFSAAI configuration schema User ID and Password.For more details, refer to the <i>Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3</i>.</p>	

Table 3. Installation Checklist

Step No.	Task	Done
11	Back up the following: <ul style="list-style-type: none"> • OFSAAI Configuration Schema ("Config" schema) • OFSAAI Installed directory (\$FIC_HOME) For more details, refer to the <i>Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3</i> . Note: The backup must be kept until the successful installation of the solution.	
OFSFCCM Pre Installation		
12	Prior to installation, ensure that sufficient free temp space (minimum 1 GB free) is available in /tmp directory of unix server hosting OFSAAI.	
13	Ensure that the Oracle database instance is up and running.	
14	Ensure that the database instance parameter processes is set to a minimum value of 1000. For more information, refer to the Installation Guide - Stage 1.	
OFSFCCM Installation		
15	Ensure that the Setup.bin, Setup.sh, validateXMLinputs.jar, log4j.xml, GRCInstall_Config.xml, and Data_Model folders containing DataModel files are copied to the machine that hosts OFSAAI and have 740 permissions. All other files must be copied in binary mode. Setup.sh and GRC_InstallConfig.xml must be copied in text mode.	
16	Create a copy of GRC_InstallConfig.xml as GRC_InstallConfig.xml.bak in the same directory and add values as in GRC_InstallConfig.xml.system specific details.	
17	Populate GRC_InstallConfig.xml. For more information, refer to section <i>Populating the GRC_InstallConfig.xml File</i> , on page 6.	
18	Install OFSFCCM solution. For more information, refer to section <i>Upgrade OFS FCCM solution in Silent Mode</i> , on page 18.	
19	Verify Installation logs for any error. For more information, refer section <i>Verification of Upgrade Logs</i> , on page 19.	
OFSFCCM Post Installation		
20	Perform post-installation steps. . For more information, refer to <i>Post Installation</i> , on page 31.	
21	Create users to access OFSFCCM solution and other administrative activities. For more information, refer to <i>Administration Guide</i> .	
22	Ensure to access OFSFCCM URL with server's Fully Qualified Domain Name (FQDN) while opening OFSFCCM UI.	

Populating Uninstall.properties

This section explains the steps to populate the ECM611_CLEANUP\Uninstall_AMCM\Uninstall.properties file. Open the Uninstall.properties from the path given in the Upgrade Utility kit directory and enter the required input parameters as per the instructions.

Uninstall.properties contains placeholders, in the format ##<PLACEHOLDER Name>##, wherever user input is required. Replace these placeholders with the corresponding values as shown below against each of these placeholders.

Table 4. Uninstall.properties Placeholders

Placeholder	Description
##INFODOM_1##	This variable is used to specify the Alert Management Information Domain (Infodom) name Sample: <Variable name="INFODOM_NAME">AMINFO</Variable>
##SEGMENT_1##	This variable is used to specify the Alert Management Segment Code. Sample: <Variable name="SEGMENT_CODE">AMSEG</Variable>
##INFODOM_2##	This variable is used to specify the Case Management Information Domain (Infodom) name. Sample: <Variable name="INFODOM_NAME">CMINFO</Variable>
##SEGMENT_2##	This variable is used to specify the Case Management Segment Code. Sample: <Variable name="SEGMENT_CODE">AMSEG</Variable>
##FICMASTER_DRIVER##	Replace this placeholder with the OFSAAI Configuration Schema Database Driver for connection purposes. Sample: <Variable name="FICMASTER_DRIVER">oracle.jdbc.driver.OracleDriver</Variable> Note: Refer to the value of the DEFAULT_DRIVER parameter in the DynamicServices.xml file under \$FIC_APP_HOME/conf for value of this parameter.
##FICMASTER_URL##	Replace this placeholder with the OFSAAI Configuration Schema Database URL for connection purposes. Sample: <Variable name="DATABASE_URL">jdbc:oracle:thin:@DBSERVER.Oracle.COM:1521:ORCL</Variable> Note: Refer to value of the DEFAULT_CONNECTION_URL parameter in the DynamicServices.xml file under \$FIC_APP_HOME/conf for value of this parameter
##FICMASTER_USER##	Replace this placeholder with the value of the OFSAAI Configuration Schema user. Sample: <Variable name="FICMASTER_USER">REVELEUS</Variable>
##FTP SHARE##	This variable is used to identify the common share area path Replace this placeholder with the same path as configured during OFSAAI Installation Sample: <VariableGroup name="LOCAL_FTPSHARE_PATH"> <Variable name="FTP SHARE_PATH">/home/ftpshare</Variable> </VariableGroup>

Populating the GRC_InstallConfig.xml File

This section explains the steps to populate the GRC_InstallConfig.xml file. Open the GRC_InstallConfig.xml from the path given in the Upgrade Utility kit directory and enter the required input parameters as per the instructions.

This file contains the following sections:

- Layer - GENERAL
- Layer - APPLICATION
- Layer - DATABASE
- Layer - WEB

The GRC_InstallConfig.xml contains placeholders, in the format `##<PLACEHOLDER Name>##`, wherever user input is required. Replace these placeholders with the corresponding values as mentioned against each one of these placeholders.

Note:

1. In single-tier installation, all layers sections are mandatory.
2. In multi-tier installation, while performing individual tier installation, GENERAL layer section information is mandatory for all layers.

Layer - GENERAL

The Layer GENERAL (`<Layer name="GENERAL">`) contains the following placeholders to provide parameter values specific to the users' system.

Table 5. Placeholders in Layer - GENERAL

Variable Name	Placeholder	Description	Example
VariableGroup name="OFSAA_INFRASTRUCTURE_CUSTOMER_CODE"			
CUSTID	##CUST_ID##	This variable is used to store the Customer ID. Replace this placeholder with Customer Code used during OFSAAI Installation.	<pre><VariableGroup name="OFSAA_INFRASTRUCTU RE_CUSTOMER_CODE"> <Variable name="CUSTID">OFSAAICUST ID</Variable> </VariableGroup></pre>
VariableGroup name="PRE_INSTALLATION"			

Table 5. Placeholders in Layer - GENERAL

Variable Name	Placeholder	Description	Example
PRE_INSTALL	##PRE_INSTALL##	<p>This variable is used to identify whether the installer will perform the following pre-installation activities:</p> <ul style="list-style-type: none"> ● Infodomain and Segment Creation for all atomic schemas ● Data Model Upload for KYC and FSDf atomic schema ● ETL Application Source creation for KYC atomic schema <p>Replace this placeholder with either of the following values: Allowable values are 0 and 1 1 - If the user wants one or more of the above pre-installation steps to be performed by the installer 0 - If the user has performed all the above steps through OFSAAI front-end or the installer (or in case running the installation for second time)</p> <p>Note: Oracle recommends that the installer to perform all these steps. In case, OFSFCCM installation has been performed second time after successful un-installation, then this parameter will be kept as 0 since it is a one-time activity. For more information, refer to <i>Uninstalling OFS FCCM</i>, on page 37.</p>	<pre><VariableGroup name="PRE_INSTALLATION" > <Variable name="PRE_INSTALL">1</V ariable> </VariableGroup></pre>
VariableGroup name="INFODOM_1"			
INFODOM_NAME	##INFODOM_1##	<p>This variable is used to specify the Alert Management Information Domain (Infodomain) name. Replace this placeholder with the Alert Management Infodomain name in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or:</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while creating a new infodomain:</p> <ul style="list-style-type: none"> ● Information Domain name specified must be at least 6 characters long ● Information Domain name must not contain any special characters or extra spaces ● Information Domain name must be less than or equal to 20 characters 	<pre><Variable name="INFODOM_NAME">AMIN FO</Variable></pre>

Table 5. Placeholders in Layer - GENERAL

Variable Name	Placeholder	Description	Example
SEGMENT_CODE	##SEGMENT_1# #	<p>This variable is used to specify the Alert Management Segment Code. Replace this placeholder with Alert Management Segment Code in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while giving a new Segment Code:</p> <ul style="list-style-type: none"> ● The segment code must be unique ● There must be no special characters and extra spaces in the code entered ● The maximum length of Segment Code must be less than or equal to of 10 characters 	<pre><Variable name="SEGMENT_CODE">AMSE G</Variable></pre>
VariableGroup name="INFODOM_2"			
INFODOM_NAME	##INFODOM_2##	<p>This variable is used to specify the Case Management Information Domain (Infodom) name. Replace this placeholder with the Case Management Infodom name in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or:</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while creating a new infodom:</p> <ul style="list-style-type: none"> ● Information Domain name specified must be at least 6 characters long ● Information Domain name must not contain any special characters or extra spaces ● Information Domain name must be less than or equal to 20 characters 	<pre><Variable name="INFODOM_NAME">CMIN FO</Variable></pre>

Table 5. Placeholders in Layer - GENERAL

Variable Name	Placeholder	Description	Example
SEGMENT_CODE	##SEGMENT_2# #	<p>This variable is used to specify the Case Management Segment Code. Replace this placeholder with Case Management Segment Code in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while giving a new Segment Code:</p> <ul style="list-style-type: none"> ● The segment code must be unique ● There must be no special characters and extra spaces in the code entered ● The maximum length of Segment Code must be less than or equal to 10 characters 	<pre><Variable name="SEGMENT_CODE">CMSE G</Variable></pre>
VariableGroup name="INFODOM_3"			
INFODOM_NAME	##INFODOM_3##	<p>This variable is used to specify the KYC Information Domain (Infodom) name. Replace this placeholder with the KYC Infodom name in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or:</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while creating a new infodom:</p> <ul style="list-style-type: none"> ● Information Domain name specified must be at least 6 characters long ● Information Domain name must not contain any special characters or extra spaces ● Information Domain name must be less than or equal to 20 characters 	<pre><Variable name="INFODOM_NAME">KYC INFO</Variable></pre>

Table 5. Placeholders in Layer - GENERAL

Variable Name	Placeholder	Description	Example
SEGMENT_CODE	##SEGMENT_3# #	<p>This variable is used to specify the KYC Segment Code.</p> <p>Replace this placeholder with KYC Segment Code in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while giving a new Segment Code:</p> <ul style="list-style-type: none"> ● The segment code must be unique ● There must be no special characters and extra spaces in the code entered ● The maximum length of Segment Code must be less than or equal to 10 characters 	<pre><Variable name="SEGMENT_CODE">KYC SEG</Variable></pre>
VariableGroup name="INFODOM_4"			
INFODOM_NAME	##INFODOM_4##	<p>This variable is used to specify the FSDF Information Domain (Infodom) name.</p> <p>Replace this placeholder with the FSDF Infodom name in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or:</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while creating a new infodom:</p> <ul style="list-style-type: none"> ● Information Domain name specified must be at least 6 characters long ● Information Domain name must not contain any special characters or extra spaces ● Information Domain name must be less than or equal to 20 characters 	<pre><Variable name="INFODOM_NAME">FSD FINFO</Variable></pre>

Table 5. Placeholders in Layer - GENERAL

Variable Name	Placeholder	Description	Example
SEGMENT_CODE	##SEGMENT_4# #	<p>This variable is used to specify the FSDF Segment Code.</p> <p>Replace this placeholder with FSDF Segment Code in either of the following cases:</p> <ul style="list-style-type: none"> ● If already created from OFSAAI front end <p>Or</p> <ul style="list-style-type: none"> ● To be created by the Installer <p>Consider the following while giving a new Segment Code:</p> <ul style="list-style-type: none"> ● The segment code must be unique ● There must be no special characters and extra spaces in the code entered ● The maximum length of Segment Code must be less than or equal to 10 characters 	<pre><Variable name="SEGMENT_CODE">FSD FSEG</Variable></pre>
VariableGroup name="LOCAL_FTPSHARE_PATH"			
FTPSHARE_PATH	##FTPSHARE_PATH##	<p>This variable is used to identify the common share area path.</p> <p>Replace this placeholder with the same path as configured during OFSAAI Installation.</p>	<pre><VariableGroup name="LOCAL_FTPSHARE_PATH"> <Variable name="FTPSHARE_PATH">/home/ftpshare</Variable> </VariableGroup></pre> <p>Note: If having multiple installation of FCCM products on same server, then keep different ftpshare path for this installation.</p>

Layer - APPLICATION

The Layer APPLICATION (<Layer name="APPLICATION">) consist of the following placeholders, which must be replaced for installation of Application Layer as one of its component..

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
Layer name="APPLICATION"	##APP_LAYER##	<p>This variable is used to identify FCCM Application Layer component to be installed on this machine, as per the OFSAAI Installation option (or Multi-tier) followed while installing OFSAAI platform.</p> <p>Allowable values for this placeholder are 0 and 1. Replace this placeholder with</p> <ul style="list-style-type: none"> 1 - if Application Layer component is to be installed 0 - if Application Layer component is not to be installed <ul style="list-style-type: none"> • If OFSAAI was installed as single tier mode, replace the placeholder with 1 • If OFSAAI was installed as multi-tier mode, this value needs to be set according to OFSAAI application layer installed on this machine • Replace the placeholder with 1 for the machine hosting OFSAAI application layer • Replace the placeholder with 0 for the machine not hosting OFSAAI application layer <p>Note: For installing FCCM, the application layer must be installed first, followed by Database and Web layer installation.</p>	<Layer name="APPLICATION" flag="1">
VariableGroup name="ALERT_MANAGEMENT_DB_DETAILS"			
ATOMIC_SCHEMA_USER_NAME	##ALERT_MANAGEMENT_USER##	<p>This variable is used to identify the first Atomic Schema. For FCCM, the first Atomic schema is Alert Management Schema.</p> <p>Replace the placeholder with Alert Management Schema Name.</p> <p>Refer to the Installation Checklist Step 4 for the schema name</p>	<VariableGroup name="ALERT_MANAGEMENT_DB_DETAILS"> <Variable name="ATOMIC_SCHEMA_USER_NAME">AM</Variable> </VariableGroup>
VariableGroup name="CASE_MANAGEMENT_DB_DETAILS"			

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
ATOMIC_SCHEMA_USER_NAME	##CASE_MANAGEMENT_USER##	This variable is used to identify the second Atomic Schema. For FCCM, the second Atomic schema is Case Management Schema. Replace the placeholder with Case Management Schema Name. Refer to the Installation Checklist, Step 4 for the schema name	<pre><VariableGroup name="CASE_MANAGEMENT_ DB_DETAILS"> <Variable name="ATOMIC_SCHEMA_US ER_NAME">CM</Variable> </VariableGroup></pre>
VariableGroup name="KYC_DB_DETAILS"			
ATOMIC_SCHEMA_USER_NAME	##KYC_USER##	This variable is used to identify the third Atomic Schema. For FCCM, the third Atomic schema is KYC Schema. Replace the placeholder with KYC Schema Name. Refer to the Installation Checklist, Step 4 for the schema name.	<pre><VariableGroup name="KYC_DB_DETAILS"> <Variable name="ATOMIC_SCHEMA_US ER_NAME">KYC</Variable> </VariableGroup></pre>
VariableGroup name="FSDF_DB_DETAILS"			
ATOMIC_SCHEMA_USER_NAME	##FSDF_USER##	This variable is used to identify the fourth Atomic Schema. For FCCM, the fourth Atomic schema is FSDF Schema. Replace the placeholder with FSDF Schema Name. Refer to the Installation Checklist, Step 4 for the schema name.	<pre><VariableGroup name="FSDF_DB_DETAILS" > <Variable name="ATOMIC_SCHEMA_US ER_NAME">FSDF</Variabl e> </VariableGroup></pre>
VariableGroup name="DATABASE_SCHEMA_DETAILS"			
BUSINESS_SCHEMA_USER	##BUSINESS_USER##	This variable is used to identify the Business Schema name. Replace the placeholder with Business Schema Name. Refer to the Installation Checklist, Step 4 for the schema name.	<pre><Variable name="BUSINESS_SCHEMA_ USER">BUSINESS</Variab le></pre>
VariableGroup name="LOG_DETAILS"			
APP_LAYER_LOG_PATH	##APP_LOG_PATH##	This variable is used to identify Application Layer log path to store logs for all front-end and back-end components that will be created by OFSAI. For example, Information Domain. Replace this placeholder with an absolute path.	<pre><Variable name="APP_LAYER_LOG_PA TH"> /home/ ftpshare/APP_logs</Var iable></pre>
DB_LAYER_LOG_PATH	##DB_LOG_PATH#	This variable is used to identify the Database Layer log path to store logs for all front-end and back-end components that will be created by OFSAI.	<pre><Variable name="DB_LAYER_LOG_PAT H">/ home/ftpshare/DB_logs< /Var iable></pre>
TaskGroup name="PRE_INSTALLATION_CONFIGURATION_SUB_SOL_1"			

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
ActionGroup name="CREATE_IN FODOM"	##INFODOM_FLAG _1##	This variable is used to identify the Alert Management Information Domain to be created by the installer. Allowable values for this placeholder are 0 and 1. Replace this placeholder with 1 - If Infodom for Alert Management is to be created 0 - If Infodom for Alert Management is already created	<ActionGroup name="CREATE_INFODOM" flag="1">
INFODOM_DESCR IPTION	##INFODOM_DES C_1##	This variable is used to identify the Alert Management Information Domain description. This value is required only if ##INFODOM_FLAG_1## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with a description for Alert Management Information Domain by following these conventions: <ul style="list-style-type: none"> • Ensure that the description field is not empty • Ensure that the description field should not exceed 50 characters 	<Variable name="INFODOM_DESCRIPTOR">Alert Management Infodom</Variable>
DATABASE_ NAME	##DB_NAME_1##	This variable is used to identify the Database Name for Alert Management Information Domain. This value is required only if ##INFODOM_FLAG_1## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with a name for the Alert Management Database by following these conventions: <ul style="list-style-type: none"> • There are no special characters and extra spaces in the name • The length of database Name must not exceed 20 characters 	<Variable name="DATABASE_NAME">AMDB</Variable>
TaskGroup name="PRE_INSTALLATION_CONFIGURATION_SUB_SOL_2"			
ActionGroup name="CREATE_IN FODOM"	##INFODOM_FLAG _2##	This variable is used to identify the Case Management Information Domain to be created by the installer. Allowable values for this placeholder are 0 and 1. Replace this placeholder with 1 - If Infodom for Case Management is to be created 0 - If Infodom for Case Management is already created	<ActionGroup name="CREATE_INFODOM" flag="1">

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
INFODOM_DESCRIPTION	###INFODOM_DESC_2##	<p>This variable is used to identify the Case Management Information Domain description. This value is required only if ###INFODOM_FLAG_2## and ###PRE_INSTALL## has been replaced by 1.</p> <p>Replace this placeholder with a description for Case Management Information Domain by following these conventions:</p> <ul style="list-style-type: none"> • Ensure the description field is not empty • Ensure the description field should not exceed 100 characters 	<pre><Variable name="INFODOM_DESCRIPTOR" >Case Management Infodom</Variable></pre>
DATABASE_NAME	DATABASE_NAME_2	<p>This variable is used to identify the Database Name for Case Management Information Domain. This value is required only if ###INFODOM_FLAG_2## and ###PRE_INSTALL## has been replaced by 1.</p> <p>Replace this placeholder with a name for the Case Management Database by following these conventions:</p> <ul style="list-style-type: none"> • There are no special characters and extra spaces in the name • The length of database name must not exceed 20 characters 	<pre><Variable name="DATABASE_NAME">C MDB< /Variable></pre>
TaskGroup name="PRE_INSTALLATION_CONFIGURATION_SUB_SOL_3"			
ActionGroup name="CREATE_INFODOM"	###INFODOM_FLAG_3##	<p>This variable is used to identify the KYC Information Domain to be created by the installer.</p> <p>Allowable values for this placeholder are 0 and 1. Replace this placeholder with</p> <ul style="list-style-type: none"> 1 - If Infodom for KYC is to be created 0 - If Infodom for KYC is already created 	<pre><ActionGroup name="CREATE_INFODOM" flag="1"></pre>

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
INFODOM_DESCRIPTION	##INFODOM_DESC_3##	<p>This variable is used to identify the KYC Information Domain description. This value is required only if ##INFODOM_FLAG_2## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with a description for KYC Information Domain by following these conventions:</p> <ul style="list-style-type: none"> • Ensure the description field is not empty • Ensure the description field should not exceed 100 characters 	<pre><Variable name="INFODOM_DESCRIPTOR" ON">KYC Infodom</Variable></pre>
DATABASE_NAME	DATABASE_NAME_3	<p>This variable is used to identify the Database Name for KYC Information Domain. This value is required only if ##INFODOM_FLAG_2## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with a name for the KYC Database by following these conventions:</p> <ul style="list-style-type: none"> • There are no special characters and extra spaces in the name • The length of database name must not exceed 20 characters 	<pre><Variable name="DATABASE_NAME">K YCDB.oracle.com</Variable></pre> <p>Note: A TNS entry must be made in tnsnames.ora with tnsname same as the value provided for KYC Database Name. If sqlnet.ora is configured with a value in NAMES.DEFAULT_DOMAIN then make sure to use same domain while defining Database Name. It is required for KYC Batch processing Or</p> <p>Note: OFSAAI recommends for the Oracle database, the #DB_NAME_3## must be same as the TNS (Transparent Network Substrate) Database Name. In case, the TNS Database Name is not yet used as Database_Name for any other Atomic Schema.</p>
ActionGroupname="DATA_MODEL_UPLOAD"	##MODEL_UPLOAD_FLAG_1##	<p>This variable is used to identify whether Data Model Upload for KYC is to be done through the Installer. Allowable values for this placeholder are 0 and 1. Replace this placeholder with 1 - if Data Model Upload for KYC is to be done through Installer 0 - if Data Model Upload for KYC is already completed</p>	<pre><ActionGroup name="DATA_MODEL_UPLOAD " flag="1"></pre>

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
DATAMODEL_TYPE	##DM_TYPE_1##	This variable is used to identify the type of Data Model Upload for KYC that is to be done through the Installer. This value is required only if ##MODEL_UPLOAD_FLAG_1## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with the type of DataModel upload to be performed. Allowable values are 0. 0=SLICED Model Upload	<Variable name="DATAMODEL_TYPE">0</Variable>
LOGICAL_UPLOAD	##LOGICAL_UPLOAD_1##	This variable is used to identify if Data Model Upload for KYC is to be Logical. This value is required only if ##MODEL_UPLOAD_FLAG_1## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with the type of DataModel upload to be performed. Allowable values are 0.	<Variable name="LOGICAL_UPLOAD">0</Variable>
DATAMODEL_FILE_PATH	##DM_FILE_PATH_1##	This variable is used to identify the type of Data Model file path used for KYC data Model Upload. This value is required only if ##MODEL_UPLOAD_FLAG_1## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with the absolute path of DataModel file.	<Variable name="DATAMODEL_FILE_PATH">/home/FCCMkit/DataModel/KYC_DataModel/Data Model KYC Release 2.0 Oracle.xml</Variable>
ActionGroupname="ETL_CREATION"	##ETL_FLAG_1##	This variable is used to identify whether ETL Application and Sources creation for KYC is to be done through the installer. Allowable values for this placeholder are 0 and 1. Replace this placeholder with: 1 - if ETL Application and Sources creation for KYC is to be done through the Installer 0 - if ETL Application and Sources for KYC is already completed	<ActionGroup name="ETL_CREATION" flag="1">
ETL_CODE	##ETL_CODE_1##	This variable is used to identify the Atomic Schema for which ETL Application and Sources creation is to be done through the installer. This value is required only if ##ETL_FLAG_1## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with 3 for KYC.	<Variable name="ETL_CODE">3</Variable>

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
IS_RAC	##IS_RAC_1##	<p>This variable is used to identify whether the database is RAC.</p> <p>This value is required only if ##ETL_FLAG_1## and ##PRE_INSTALL## has been replaced by 1.</p> <p>Allowable Values are 0 and 1. Replace this placeholder with:</p> <ul style="list-style-type: none"> 1 - if Database on which OFSAAI is installed is RAC 0 - if Database on which OFSAAI is installed is not RAC. 	<Variable name="IS_RAC">0</Variable>
TaskGroup name="PRE_INSTALLATION_CONFIGURATION_SUB_SOL_4"			
ActionGroup name="CREATE_INFODOM"	##INFODOM_FLAG_4##	<p>This variable is used to identify the FSDF Information Domain to be created by the installer.</p> <p>Allowable values for this placeholder are 0 and 1. Replace this placeholder with:</p> <ul style="list-style-type: none"> 1 - if Infodom for FSDF is to be created 0 - if Infodom for FSDF is already created 	<ActionGroup name="CREATE_INFODOM" flag="1">
INFODOM_DESCRIPTION	##INFODOM_DESC_4##	<p>This variable is used to identify the FSDF Information Domain description. This value is required only if ##INFODOM_FLAG_4## and ##PRE_INSTALL## has been replaced by 1.</p> <p>Replace this placeholder with a description for FSDF Information Domain by following these conventions:</p> <ul style="list-style-type: none"> ● Ensure the description field is not empty ● Ensure the description field should not exceed 100 characters 	<Variable name="INFODOM_DESCRIPTOR">FSDF Infodom</Variable>
DATABASE_NAME	##DB_NAME_4##	<p>This variable is used to identify the Database Name for FSDF Information Domain.</p> <p>This value is required only if ##INFODOM_FLAG_4## and ##PRE_INSTALL## has been replaced by 1.</p> <p>Replace this placeholder with a name for the FSDF Database by following below conventions:</p> <ul style="list-style-type: none"> ● There are no special characters and extra spaces in the name ● The length of database Name should not exceed 20 characters 	<Variable name="DATABASE_NAME">FSDF DB</Variable>

Table 6. Placeholders in Layer - APPLICATION

Variable Name	Placeholder	Description	Example
ActionGroup name="DATA_MODEL_UPLOAD"	##MODEL_UPLOAD_FLAG_2##	This variable is used to identify whether Data Model Upload for FSDF is to be done through the Installer Allowable values for this placeholder are 0 and 1. Replace this placeholder with 1 - if Data Model Upload for FSDF is to be done through the Installer 0 - if Data Model Upload for FSDF is already completed	<ActionGroup name="DATA_MODEL_UPLOAD " flag="1">
DATAMODEL_TYPE	##DM_TYPE_2##	This variable is used to identify the type of Data Model Upload for FSDF that is to be done through the Installer. This value is required only if ##MODEL_UPLOAD_FLAG_2## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with the type of DataModel upload to be performed. Allowable values are 0. 0=SLICED Model Upload	<Variable name="DATAMODEL_TYPE"> 0 </Variable>
LOGICAL_UPLOAD	##LOGICAL_UPLOAD_2##	This variable is used to identify if the Data Model Upload for FSDF is to be Logical. This value is required only if ##MODEL_UPLOAD_FLAG_2## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with the type of DataModel upload to be performed. Allowable values are 0.	<Variable name="LOGICAL_UPLOAD"> 0 </Variable>
DATAMODEL_FILE_PATH	##DM_FILE_PATH_2##	This variable is used to identify the type of Data Model file path used for FSDF data model upload. This value is required only if ##MODEL_UPLOAD_FLAG_2## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with the absolute path of DataModel file.	<Variable name="DATAMODEL_FILE_PATH">/home/FCCMkit/Data Model/FSDF_DataModel/FCC CM_Staging_Release62.xml</Variable>

Layer - DATABASE

The Layer DATABASE (<Layer name="DATABASE">) contains the following placeholders, which must be configured for installation of Database Layer as one of its component..

Table 7. Placeholders in Layer - DATABASE

Variable Name	Placeholder	Description	Example
Layer name="DATABASE"	##DB_LAYER#	<p>This variable is used to Identify FCCM Database Layer component to be installed on this machine, as per the OFSAAI Installation option (or multi-tier) followed while installing the OFSAAI platform. Allowable values for this placeholder are 0 and 1. Replace this placeholder with</p> <ul style="list-style-type: none"> 1 - if DATABASE Layer component is to be installed. 0 - if DATABASE Layer component is not to be installed <p>Replace the place holder with 1 in case OFSAAI was installed as single - tier mode If OFSAAI was installed as multi -tier mode, this value needs to be set according to the OFSAAI DATABASE layer installed on this machine:</p> <ul style="list-style-type: none"> Replace the placeholder with 1 for the machine hosting OFSAAI DATABASE layer Replace the placeholder with 0 for the machine NOT hosting OFSAAI DATABASE layer 	<Layer name="DATABASE" flag="1">
VariableGroup name="DATABASE_DETAILS"			
DATABASE_URL	##DB_URL##	Replace this placeholder with OFSAAI Configuration Schema Database URL for the connection purpose.	<pre><Variable name="DATABASE_URL">jdbc:oracle:thin:@DBSERVER.Oracle.com:1521:ORCL</Variable></pre> <p>Note: Refer to the value of DEFAULT_CONNECTION_URL parameter in the file-DynamicServices.xml under \$FIC_APP_HOME/conf for value of this parameter.</p>
FICMASTER_DRIVER	##DB_DRIVER##	Replace this placeholder with the OFSAAI Configuration Schema Database Driver for the connection purpose.	<pre><Variable name="FICMASTER_DRIVER">oracle.jdbc.driver.OracleDriver</Variable></pre> <p>Note: Refer to the value of DEFAULT_DRIVER parameter in the file-DynamicServices.xml under \$FIC_APP_HOME/conf for value of this parameter.</p>

Table 7. Placeholders in Layer - DATABASE

Variable Name	Placeholder	Description	Example
FICMASTER_USER	##CONFIGURATION_USER#	Replace this placeholder with the value of OFSAAI Configuration Schema user.	<Variable name="FICMASTER_USER">REVELEUS</Variable> Refer to the Installation Checklist, Step 10 for the schema name.
VariableGroup name="DATABASE_SCHEMA_DETAILS"			
BUSINESS_SCHEMA_USER	##BUSINESS_USER##	This variable is used to identify the Business Schema name. Replace the placeholder with BUSINESS Schema Name.	<Variable name="BUSINESS_SCHEMA_USER">BUSINESS</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
MARKET_SCHEMA_USER	##MARKET_USER##	This variable is used to identify the Market Schema name. Replace the placeholder with Market Schema Name.	<Variable name="MARKET_SCHEMA_USER">MARKET</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
ALERT_MANAGEMENT_SCHEMA_USER	##ALERT_MANAGEMENT_USER##	This variable is used to identify the Alert Management Schema name. Replace the placeholder with the Alert Management Schema name.	<Variable name="ALERT_MANAGEMENT_SCHEMA_USER">AM</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
KDD_WEB_SCHEMA_USER	##KDD_WEB_USER##	This variable is used to identify the WEB Schema name. Replace the placeholder with WEB Schema Name.	<Variable name="KDD_WEB_SCHEMA_USER">KDD_WEB</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
KDD_SCHEMA_USER	##KDD_USER##	This variable is used to identify the KDD Schema name. Replace the placeholder with KDD Schema Name.	<Variable name="KDD_SCHEMA_USER">KDD</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
KDD_MNR_SCHEMA_USER	##KDD_MNR_USER##	This variable is used to identify the KDD MNR Schema name. Replace the placeholder with MNR Schema Name.	<Variable name="KDD_MNR_SCHEMA_USER">KDD_MNR</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
DB_UTIL_USER	##DB_UTIL_USER##	This variable is used to identify the DB UTIL Schema name. Replace the placeholder with DB UTIL Schema Name.	<Variable name="DB_UTIL_USER">DB_UTIL_USER</Variable> Refer to the Installation Checklist, Step 4 for the schema name.

Table 7. Placeholders in Layer - DATABASE

Variable Name	Placeholder	Description	Example
KDD_ALG_SCHEMA_USER	##KDD_ALG_USER##	This variable is used to identify the Algorithm Schema name. Replace the placeholder with Algorithm Schema Name.	<Variablename="KDD_ALG_SCHEMA_USER">KDD_ALG</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
INGEST_SCHEMA_USER	##INGEST_SCHEMA_USER##	This variable is used to identify the Ingest Schema name. Replace the placeholder with Ingest Schema Name.	<Variablename="INGEST_SCHEMA_USER">INGEST_USER</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
FSDF_SCHEMA_USER	##FSDF_SCHEMA_USER##	This variable is used to identify the FSDF Schema name. Replace the placeholder with FSDF Schema Name.	<Variablename="FSDF_SCHEMA_USER">FSDF_USER</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
KDD_ALGORITHM	##KDD_ALG_ROLE##	This variable is used to identify the Algorithm Role name. Replace the placeholder with Algorithm Role Name.	<Variablename="KDD_ALGORITHM">KDD_ALGORITHM</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
KDD_ANALYST	##KDD_ANALYST_ROLE##	This variable is used to identify the Analyst Role name. Replace the placeholder with Analyst Role Name.	<Variablename="KDD_ANALYST">KDD_ANALYST</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
DATA_LOADER_ROLE	##DATA_LOADER_ROLE##	This variable is used to identify the Data Loader Role name. Replace the placeholder with Data Loader Role Name.	<Variablename="DATA_LOADER_ROLE">DATA_LOADER</Variable> Refer to the Installation Checklist, Step 4 for the schema name.
VariableGroup name="OFSBDP_DETAILS"			
SINGLE_TIER_FLAG	##SINGLE_TIER_FLAG##	This variable is used to identify that OFSBDF is on same machine as in which the OFSAAI DB layer is installed. 0: if installed on same machine 1: if installed on different machine	<Variable name="INFODOM_NAME">AMINFO</Variable>
OFSBDP_USER_ID	##OFSBDP_USER_ID##	This variable takes the direct login unix user input of the machine where OFSBDF is installed.	<Variable name="OFSBDP_USER_ID">ofsaa</Variable>
OFSBDP_SERVER_HOST	##OFSBDP_SERVER_HOST##	This variable takes the input of the hostname or IP address of the machine where OFSBDF is installed.	<Variable name="OFSBDP_SERVER_HOST">unix.oracle.com</Variable>

Table 7. Placeholders in Layer - DATABASE

Variable Name	Placeholder	Description	Example
OFSBDP_HOME	##OFSBDP_HOME##	This attribute holds the path where the execute.sh file is present in the OFSBDF installed System.	<Variable name="OFSBDP_HOME"><OFSBDF Installed Directory>/bdf/scripts </Variable>
VariableGroup name="TABLESPACE_1"			
DATA_TABLE_SPACE	##DATA_TABLESPACE_1##	Replace this placeholder with KYC Data Tablespace Name.	<Variable name="DATA_TABLE_SPACE">KYC_DATA</Variable> This should be the same as the value of KYC Data Tablespace name created during the OFSBDF installation. For more details, refer to APPENDIX D, OFSBDF Data Model Variables of Installation Guide -Stage 1.
INDEX_TABLE_SPACE	##INDEX_TABLESPACE_1##	Replace this placeholder with KYC INDEX Tablespace Name.	<Variable name="INDEX_TABLE_SPACE">KYC_INDEX</Variable> > This should be the same as the value of KYC Data Tablespace name created during the OFSBDF installation. For more details, refer to APPENDIX D, OFSBDF Data Model Variables of Installation Guide -Stage 1.
VariableGroup name="ADMIN_TOOLS_CONTEXT_NAME"			
ADMIN_CONTEXT_NAME	##ADMIN_TOOLS_CONTEXT##	Replace this placeholder with a string to be used as context name for Admin Tools, for deployment purpose.	<Variable name="ADMIN_CONTEXT_NAME">admin_tools</Variable>

Layer - WEB

The Layer WEB (<Layer name="WEB">) contains the following placeholders which must be configured for installation of WEB layer as one of its component..

Table 8. Placeholders in Layer - WEB

Variable Name	Placeholder	Description	Example
Layer name="WEB "	##WEB_LAYER##	<p>This variable is used to identify OFSFCCM Web Layer component to be installed on this machine, as per the OFSAAI installation option (or multi-tier) followed while installing OFSAAI platform. Allowable values for this placeholder are 0 and 1. Replace this placeholder with</p> <p>1 - if WEB Layer component is to be installed 0 - if WEB Layer component is not to be installed</p> <ul style="list-style-type: none"> ● If OFSAAI was installed as single - tier mode, replace the place holder with 1. ● If OFSAAI was installed as multi-tier mode, this value needs to be set according to the OFSAAI Web layer installed on this machine: <ul style="list-style-type: none"> ■ Replace the placeholder with 1 for the machine hosting OFSAAI Web layer ■ Replace the placeholder with 0 for the machine not hosting OFSAAI Web layer <p>Note: For installing OFSFCCM, APP layer installation happens first and then followed by Database and Web layer.</p>	<Layer name="WEB" flag="1">
VariableGroup name="DATABASE_DETAILS"			
FICMASTER_USER	##CONFIGURATION_USER##	Replace this placeholder with the value of OFSAAI Configuration Schema user.	<Variable name="FICMASTER_USER">R EVELEUS</Variable> Note: Refer to the Installation Checklist, Step 10 for the schema name.
VariableGroup name="DATABASE_SCHEMA_DETAILS"			
BUSINESS_SCHEMA_USER	##BUSINESS_USER##	<p>This variable is used to identify the Business Schema name. Replace the placeholder with BUSINESS Schema Name.</p>	<Variable name="BUSINESS_SCHEMA_USER">BUSINESS</Variable> Note: Refer to the Installation Checklist, Step 4 for the schema name.

Table 8. Placeholders in Layer - WEB

Variable Name	Placeholder	Description	Example
MARKET_SCHE MA_US ER	##MARKET_USE R##	This variable is used to identify the Market Schema name. Replace the placeholder with Market Schema Name.	<Variable name="MARKET_SCHE MA_USE R">MARKET</Variab le> Note: Refer to the Installation Checklist, Step 4 for the schema name.
ALERT_MANAGE MENT_SCHEMA_ USER	##ALERT_MANA GEMENT_USER# #	This variable is used to identify the Alert Management Schema name. Replace the placeholder with the Alert Management Schema name.	<Variable name="ALERT_MANAG EMENT_ SCHEMA_USER">AM</ Variab le> Note: Refer to the Installation Checklist, Step 4 for the schema name.
KDD_WEB_SCHE MA_USER	##KDD_WEB_US ER##	This variable is used to identify the WEB Schema name. Replace the placeholder with WEB Schema Name.	<Variable name="KDD_WEB_SCH EMA_USER" >KDD_WEB</Variabl e> Refer to the Installation Checklist,Step 4 for the schema name.
KDD_SCHEMA_U SER	##KDD_USER##	This variable is used to identify the KDD Schema name. Replace the placeholder with KDD Schema Name.	<Variable name="KDD_SCHEMA_ USER">KDD </Variable> Refer to the Installation Checklist,Step 4 for the schema name.
KDD_MNR_SCHE MA_U SER	##KDD_MNR_US ER# #	This variable is used to identify the KDD MNR Schema name. Replace the placeholder with MNR Schema Name.	<Variable name="KDD_MNR_SCH EMA_USER" >KDD_MNR</Variabl e> Refer to the Installation Checklist,Step 4 for the schema name.
VariableGroup name="OBIEE_REPORTS_INSTALLATION"			
OBIEE_REPORT S	##OBIEE##	This variable is used to identify whether Oracle Business Intelligence Enterprise Edition (OBIEE) needs to be integrated in the setup. Allowable values for this placeholder are 0 and 1. Replace this placeholder with 0 - if OBIEE reports related files are not be installed 1 - if OBIEE reports related files are to be installed	<Variable name="OBIEE _REPORTS">1< /Variable>

This chapter covers the following topics:

- Removing Redundant OFSECM 6.1.1 Data
- Upgrade OFSBDF
- Upgrade OFSFCCM solution in Silent Mode
- Verification of Upgrade Logs

Removing Redundant OFSECM 6.1.1 Data

For cleaning OFSECM 6.1.1 data in a particular OFSAAI Layer, follow these steps. If your implementation has multi-tier architecture, the OFSFCCM Uninstaller must be run on all servers hosting an OFSAAI Layer.

1. Before starting the OFSFCCM Uninstallation, execute .profile to set the environment variables using the following command:

```
$ ksh  
$ ../.profile
```
2. Copy Migration Uninstall_AMCM from ECM611_CLEANUP to the FCCM 6.1.1 \$<FIC_HOME> directory
3. Replace the following place holders in respective Files:

```
##CMINFODOM##-Case Management Infodom at path $<FIC_HOME>\Uninstall_AMCM\CM  
##AMINFODOM##-Alert Management Infodom at path $<FIC_HOME>\Uninstall_AMCM\AM
```
4. Grant chmod 755 permission to Uninstall_App.sh.
5. Run Uninstall_App.sh.

Upgrade OFSBDF

This assumes that you are currently on 6.1.1 version and have applied all patches released on top of 6.1.1, including 6.1.0.1.5. If you ran the 6.1.1 upgrade deltas packaged with OFSBDF 6.2 then there is no need to apply any 6.1.1 patches. The following steps will bring you up to 6.2 GA release.

Follow the steps mentioned in the *Installation Guide - Stage 1* to install BDF 6.2 into a <<OFSBDF Installed Directory>> directory that is separate from the existing Mantas / OFSBDF installation base directory. During this process it is important to skip the steps listed in section Installing the Data Model under Chapter 3 of the *Installation*

Guide - Stage 1. Also make sure that you have updated the db_variables.cfg file under <<OFSBDF Installed Directory>>/database/db_tools/mantas_cfg folder. *Appendix D* of the *Installation Guide - Stage 1* describes the parameters in this file.

The upgrade scripts are executed using the DB Builder utility. There is only one command line for the mantas schema upgrade and one command for the business/market schema upgrade for each OFSBDF version.

Replace the plat6.2_b09.16765104.business.sql delta script located in the following path with the file from patch fccm_hotfix_20130723.01.

```
<USER_INSTALL_HOME>/database/bus_mkt_schema/delta/oracle
```

Continue running the delta scripts as outlined below. To reach 6.2 GA run the following:

Change the directory to \$ECM_HOME/database/mantas_schema/delta/oracle/6.2 and execute the following command:

```
../../../../db_tools/bin/run_dbbuilder_utility.sh mantas6.2_delta.cfg
```

Change the directory to \$ECM_HOME/database/bus_mkt_schema/delta/oracle/6.2 and execute the following command:

```
../../../../db_tools/bin/run_dbbuilder_utility.sh delta_plat6.2.cfg
```

Note: For Mapping of Workflow and Corresponding BDF Data maps refer to the WorkflowAndCorrespondingBDFDatamaps.xls guide.

When prompted to enter the Altio user Token, give the Altio User name used in ECM6.1 .

Upgrade OFSFCCM solution in Silent Mode

OFS FCCM comprises the components that are installed in the OFSAAI DB, APP and WEB layers. If OFSAAI is installed in a Multi -Tier architecture, then OFS FCCM Upgrade must be invoked on each machine that hosts different tiers. This section describes the upgrade process in which the OFSAAI is upgraded using Single -Tier option.

For a Single-Tier Upgrade, the upgrade utility is required to be invoked only once on the machine that hosts all the OFSAAI Platform tiers.

Important: For a Multi-Tier Upgrade, the installation should be done in the following order (any two layer can be done collectively):

- Application Layer (first)
- Database Layer or Web Layer (in any order after Application layer)

To upgrade OFS FCCM in Silent Mode, follow these steps:

Important: Make sure to perform all steps in the Upgrade Checklist.

1. Before starting the OFS FCCM upgrade, execute .profile to set the environment variables using below command:

```
$ ksh
```

```
$ ../.profile
```

2. Navigate to the OFS FCCM upgrade kit directory.

3. Execute the below command :

```
$ ./Setup.sh SILENT
```

4. Enter the following passwords raised by the installer:

- [LOG] Starting up.....
- Enter Config Schema Password ::
- Enter BUSINESS Schema Password ::
- Enter Alert Management Schema Password ::
- Enter MARKET Schema Password ::
- Enter KDD-WEB Schema Password ::
- Enter KDD Schema Password ::
- Enter KDD MNR Schema Password ::
- Enter DB UTIL Schema Password ::
- Enter KDD ALGORITHM Schema Password ::
- Enter Alert Management Schema Password ::
- Enter Case Management Schema Password::
- Enter KYC Atomic Schema Password::
- Enter FSDF Schema Password ::
- Enter INGEST Schema Password ::
- Enter OFSBDP User Password ::

Note:

In case of single Tier upgrade, upgrade utility will NOT ask Config Schema Password.

Subsequently, the Upgrade process starts and after a successful upgrade, Installation Complete message appears on the screen.

Verification of Upgrade Logs

Once you complete installation, check all the installation logs for any errors.

- SolutionSetup_InstallLog.log, which is created in OFSFCCM installed directory (\$FIC_HOME).
- SolutionsLOG.log , which is created in OFSFCCM installed directory (\$FIC_HOME).
- *.log file , which will be created at the path from where installation is triggered.
- ECM6.1.1_UnInstall.log inside Uninstall_AMCM folder .

Note: If you observe any warnings/non fatal errors/fatal errors/exceptions/ORACLE error reported in either of the logs, notify the OFSECM support personnel. Do not proceed with the installation process until all the issues are addressed.

Upon successful installation, proceed to post installation steps as explained in the following chapters.

Ignore the following warning message coming in SolutionSetup_InstallLog.log where the placeholders <ftpshare> in the message is replaced with the actual ftpshare area path.

WARNING- Source <ftpshare> /STAGE/ExcelUpload/INFODOM does not exist.

This chapter provides information about the Post Installation activities and includes the following topics:

- DB Layer Configuration
- Restart Application Servers
- Web Layer Configuration
- OFSAAI Redeployment
- Admin Tools Deployment
- Scenario Wizard Configuration and Deployment
- Restarting Web Application Server
- Creating Users to Access FCCM
- Setting the FCCM UI as Home Page of OFSAAI for a Particular User

DB Layer Configuration

For Single Tier Installation:

1. Navigate to the ficdb/bin then open the WLS_FuzzyMatch.sh file and replace the following placeholders:

```
##INGESTION_DIRECTORY## = <OFSBDP Installed Directory>/  
ingestion_manager/fuzzy_match/bin
```

For example: /home/mantasap/BDP_6.2/ingestion_manager/fuzzy_match/bin

```
##FTP SHARE_HOME## = FTPShare path
```

For example: /home/mantasap/ftpshare

2. Provide the path where the target name list is present:

```
export Fuzzy_Dir= Path of Target file in BDP
```

For example: export Fuzzy_Dir=/home/mantasap/BDP_6.2/bdf/data/temp/NameMatchStagingTarget.list

Restart Application Servers

Once OFSECM is successfully installed, restart the OFSAAI Application Server and the ICC Server.

To start the application servers (Infrastructure Server) and ICC server, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

During the restart of OFSAAI application server, ignore the following message which appears on the console of the OFSAAI application server and continue. (The placeholders <AMINFODOM> and <CMINFODOM> in the message are replaced with the Alert Management Infodomain values).

```
"java.io.FileNotFoundException: /<ftpshare  
path>/<AMINFODOM>/erwin/fipxml/<AMINFODOM>_DATABASE.XML (No such file or directory) "
```

```
"java.io.FileNotFoundException: /<ftpshare  
path>/<CMINFODOM>/erwin/fipxml/<CMINFODOM>DATABASE.XML (No such file or directory) "
```

Web Layer Configuration

Login to the Web Application server console for creating Java Data Base Connectivity (JDBC) resources for Alert Management and Case Management schemas by providing the Alert Management, Case Management and KYC InfoDom names and Atomic schema User Names/passwords respectively.

For more information, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

Note: While creating Data Source do NOT select any driver for (Thin XA). Always choose database Driver as "Oracle's driver (Thin) for service connection; Version...."

Verify the connection pool settings for Alert Management, Case Management and KYC Data Sources. It should be 100.

Follow these steps depending on the type of Web Application server (Websphere/Weblogic) used:

For Websphere:

1. Login to the Websphere Admin console.
2. Click on **Resources**, select **JDBC**, select **JDBC Providers**.
3. Select the data sources applicable for ECM 6.2 (Including settings for Alert Management, Case Management and KYC data sources).
4. In Additional Properties, click on **Data Sources**.
5. Click the data source name.
6. In Additional Properties, click **Connection Pool Properties**.

Note: If the value for the maximum connection is less than '100', then make it 100.

For Weblogic:

1. Login to the Weblogic Admin console.
2. Click on **Services**, select **JDBC**, select **Data Sources**.
3. Select the data sources applicable for ECM 6.2 (Including settings for Alert Management, Case Management and KYC data sources).
4. Click the **Connection Pool** tab.
5. If the value for the maximum capacity is less than '100', then make it to 100.
6. Verify the Memory settings for the Web Application Server. Set the Minimum Heap size as 512 MB and the Maximum Heap size as 3 GB.

For more information, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

OFSAAI Redeployment

Deploy the <Context-name>.ear (for example, OFSAAI.ear) available at \$FIC_HOME/ficweb directory. For instructions on deploying the EAR file, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

Admin Tools Deployment

To deploy Admin Tools, follow these steps:

1. Go to \$FIC_HOME/ficweb/AM installed directory and run the script file ./changePasswords.sh
2. Go to \$FIC_HOME/ficweb/AM installed directory and run the script file ./create_at_war.sh
3. Deploy the <admin_tool_context-name>.war (for example, admin_tools.war) available at \$FIC_HOME/AM directory, as an application on your Web Application Server.

For instructions on deploying the EAR file, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

Scenario Wizard Configuration and Deployment

Navigate to <FIC_HOME>/ficweb/SCENARIO_WIZARD and follow these steps:

1. Execute `install.sh`. When prompted for a password, enter the KDD MNR Schema password.
2. Deploy the <context-name>.war file (for example SMLiteWeb.war) available at <FIC_HOME>/ficweb/SCENARIO_WIZARD as an application on your Web Application Server.

Note: For instructions on deploying the EAR file, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

For Front-end access, the following settings must be changed on each Client side for the Scenario Wizard to work in Windows XP/Windows 7.

1. Navigate to **Control Panel -> Java**. A Java Control Panel displays.
2. Under the General tab, verify the following settings:
 - Navigate to **Network Settings** and change the Network Proxy Settings to **Direct Connection**.
 - Navigate to **Settings** under Temporary Internet Files and select the option to **Keep temporary files on my computer**.
3. Click **Delete Files** to clear the Java cache.

Restarting Web Application Server

After all previous steps are completed, restart the Web Application Server.

Creating Users to Access FCCM

To create users for accessing the FCCM solution, follow these steps:

1. Create users. For example:
 - ECM Administrator
 - ECM Supervisor
 - ECM Analyst
 - WLM Analyst
 - WLM Supervisor
 - KYC Administrator
 - KYC Supervisor
2. Perform all necessary mapping of Users.
3. Access FCCM with the ECM Administrator and upload Meta Data into the database.
4. Access FCCM with the ECM Administrator and perform Security Attributes mapping. For more information, refer to the *Administration Guide* and *Oracle Financial Services Analytical Applications Infrastructure User Manual Release 7.3*:
5. Once Security Attributes mapping is completed for the ECM Administrator user, restart OFSAAI and Web Application servers before accessing the Admin Tools application.
6. Perform the following mandatory configurations: For more information, refer to the *Configuration Guide*.
 - General Configurations
 - Configuring the Base Time Zone
 - Configuring the Default Currency Code
 - Configuring E-mail
 - Configuring XML Export
 - Alert Management Configuration
 - Configuring Organization Relationships for Trade Blotter
 - Case Management Configuration
 - Configuring Case Correlation Owner
 - Configuring Default Case Owner
7. Access the FCCM UI with KYC Administrator and perform all steps given in the *Oracle Financial Services Know Your Customer Administration Guide*:
8. Access the FCCM UI.

Setting the FCCM UI as Home Page of OFSAAI for a Particular User

Log in as an OFSECM Administrator/ Supervisor User. You are navigated to the Home page. Select Enterprise Case Management as the default page and click **Save**.

This chapter provides information about how to uninstall OFSFCCM in a particular OFSAAI Layer. If your implementation uses multi-tier architecture, the OFSFCCM Uninstaller must be run on all servers hosting an OFSAAI Layer.

1. Before uninstalling OFSFCCM , execute .profile to set the environment variables using the following command:

```
$ ksh  
$ ../.profile
```
2. Navigate to the \$FIC_HOME/Uninstall_ECM62 directory and execute the following command:

```
$ ./Uninstall_App.sh
```
3. Input the Configuration Schema Password when prompted.
4. After running the uninstaller on all layers, do the following:
 - Uninstall the OFSAAI .ear file deployed on the Web Server.
 - Navigate to \$FIC_HOME/ficweb on the server hosting the WEB Layer.
 - Execute the following command to recreate the .ear file.

```
$ ./ant.sh
```
 - Deploy the new .ear file on the Web Server.

For instructions on deploying the .EAR file, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

Important: The OFSFCCM Uninstaller does not perform the following activities:

- It does NOT Delete Infodomain and Segment created as part of the OFSFCCM Installation
- It does NOT Revert DataModel Upload done as part of the OFSFCCM Installation
- It does NOT Delete ETL Applications and Sources created as part of the OFSFCCM Installation

If you are re-installing OFSFCCM after running the un-installer, keep the same InfoDom and Segment Names for all the atomic schemas. During the next installation, replace the following parameters in the GRC_InstallConfig.xml with 0 or NA before starting installation since all these items already exist in the database.

The following table describes the parameters to be marked as 0 or NA in the GRC_InstallConfig.xml file for the next installation..

Table 9. Placeholders in Layer - WEB

Variable Name	Preferred Value	Description	Example
VariableGroup name="PRE_INSTALLATION"			
PRE_INSTALL	0	This variable is used to identify whether the installer will perform the following re-Installation activities Infodom and Segment Creation for all atomic schemas Data Model Upload for KYC atomic schema. ETL Application Source creation for KYC atomic schema Replace this placeholder with 0. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, keep this parameter as 0 since it is a onetime activity.	<VariableGroup name="PRE_INSTALLATION"><Variable name="PRE_INSTALL">0</Variable></VariableGroup>
TaskGroup name="PRE_INSTALLATION_CONFIGURATION_SUB_SOL_1"			
ActionGroup name="CREATE_INFODOM"	0	This variable is used to identify the Alert Management Information Domain to be created by the installer. Replace this placeholder with 0 Note: If OFSFCCM installation has been performed a second time after successful Un-installation, keep this parameter as 0 since it is a onetime activity.	<ActionGroup name="CREATE_INFODOM" flag="0">
INFODOM_DESCRIPTION	NA	This variable is used to identify the Alert Management Information Domain Description. This value is required only if ## INFODOM_FLAG_1## and ##PRE_INSTALL## has been replaced by 1. Replace this placeholder with NA. Note: If OFSFCCM installation has been performed a second time after successful Un-installation,hen replace this placeholder with NA.	<Variable name="INFODOM_DESCRIPTION">NA</Variable>
DATABASE_NAME	NA	This variable is used to identify the Database Name for Alert Management Information Domain. This value is required only if ## INFODOM_FLAG_1## and ##PRE_INSTALL## has been replaced by 1 Replace this placeholder with NA. Note: If OFSFCCM installation has been performed a second time after successful Un-installation,hen replace this placeholder with NA.	<Variable name="DATABASE_NAME">NA</ Variable>
TaskGroup name="PRE_INSTALLATION_CONFIGURATION_SUB_SOL_2"			
ActionGroup name="CREATE_INFODOM"	0	This variable is used to identify the Case Management Information Domain to be created by installer. Replace this placeholder with 0. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, keep this parameter as 0 since it is a onetime activity.	<ActionGroup name="CREATE_INFODOM" flag="0">

Table 9. Placeholders in Layer - WEB

Variable Name	Preferred Value	Description	Example
INFODOM_DESC RIPTION	NA	This variable is used to identify the Case Management Information Domain Description. This value is required only if ## INFODOM_FLAG_2## and ##PRE_INSTALL## has been replaced by 1 Replace this placeholder with NA. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, then replace this placeholder with NA.	<Variable name="INFODOM_DESC RIPTION ">Case Management Infodom</Variable>
DATABASE_NAME	NA	This variable is used to identify the Case Management Information Domain. This value is required only if ## INFODOM_FLAG_2## and ##PRE_INSTALL## has been replaced by 1 Replace this placeholder with NA. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, then replace this placeholder with NA.	<Variable name="DATABASE_NAME">CMDB</Variable>
TaskGroup name="PRE_INSTALLATION_CONFIGURATION_SUB_SOL_3"			
ActionGroup name="CREATE_INFODOM"	0	This variable is used to identify the KYC Information Domain to be created by installer. Replace this placeholder with 0. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, keep this parameter as 0 since it is a onetime activity.	<ActionGroup name="CREATE_INFODOM" flag="0">
INFODOM_DESC RIPTION	NA	This variable is used to identify the Case Management Information Domain Description. This value is required only if ## INFODOM_FLAG_2## and ##PRE_INSTALL## has been replaced by 1 Replace this placeholder with NA. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, then replace this placeholder with NA.	<Variable name="INFODOM_DESC RIPTION ">Case Management Infodom</Variable>
DATABASE_NAME	NA	This variable is used to identify the Case Management Information Domain. This value is required only if ## INFODOM_FLAG_2## and ##PRE_INSTALL## has been replaced by 1 Replace this placeholder with NA. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, then replace this placeholder with NA.	<Variable name="DATABASE_NAME">CMDB</Variable>

Table 9. Placeholders in Layer - WEB

Variable Name	Preferred Value	Description	Example
ActionGroup name="DATA_MODEL_UPLOAD"	0	This variable is used to identify whether Data Model Upload for KYC is to be done through Installer. Replace this placeholder with 0. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, keep this parameter as 0 since it is a onetime activity.	<ActionGroup name="DATA_MODEL_UPLOAD" flag="0">
ActionGroup name="ETL_CREATION"	0	This variable is used to identify whether ETL Application and Sources creation for KYC is to be done through Installer. Replace this placeholder with 0. Note: If OFSFCCM installation has been performed a second time after successful Un-installation, keep this parameter as 0 since it is a onetime activity.	<ActionGroup name="ETL_CREATION" flag="0">

Deploying OFSECM Analytic Reports and Threshold Analyzer

This chapter explains how to deploy OFSECM Analytics on Oracle Business Intelligence Enterprise Edition (OBIEE) and how to integrate Analytic Reports and Threshold Analyzer in the OFSECM UI. This chapter includes the following topics:

- Installing OBIEE Server
- Installing OBIEE Windows Administration Client
- Disabling the Cache Feature in OBIEE Server
- Change Default Repository Password
- Configuring OBIEE Connection Pool
- Deploying OFSECM Report Analytics
- Post Installation Steps
- Accessing Reports through OFSECM Application
- Upgrading OFSECM Analytics Reports

Installing OBIEE Server

To install an Oracle Business Intelligence Enterprise Edition (OBIEE) server, refer to *Oracle® Fusion Middleware Installation Guide for Oracle Business Intelligence11g Release 1 (11.1.1.6.7)*. After installation get the Enterprise Manager URL, Username, Password and OBIEE installed directory from the system administrator.

Installing OBIEE Windows Administration Client

To install the OBIEE Repository Administration Client for a Windows machine, refer to the *Oracle® Fusion Middleware Installation Guide for Oracle Business Intelligence11g Release 1 (11.1.1.6.7)*.

The OBIEE Repository Administration Client can be downloaded by running the OBIEE setup from the following URL:

`<protocol>://<OBIEE Server Name>:<OBIEE Analytics port>/analytics`

From the left hand side menu, click **Get Started -> Download BI Desktop Tools** .

Disabling the Cache Feature in OBIEE Server

Login into the Enterprise Manager and perform the following steps:

1. Click the **Business Intelligence** folder from the left hand side menu and select **coreapplicaiton**.

2. Click the **Capacity Management** tab then select the **Performance** tab.
3. Click the **Lock and Edit Configuration** tab.
4. To disable the Cache, uncheck the **Cache Enabled** Option.
5. Click **Apply** and **Activate Changes**.
6. Click **Restart** to apply recent changes.

Change Default Repository Password

Copy ECM_6.2.rpd from the \$FIC_HOME/OBIEE/Repository to the Windows machine where the OBIEE Windows Administration Client is installed. Change the default password for the Repository by following these steps:

1. Open the Repository using the OBIEE Windows Administration Client from the Windows machine.
2. From the File menu, select **Open** and click **Offline**.
3. Browse the Repository on the Windows machine. The Oracle BI Administration Tool - ECM_6.2.rpd windows displays.
4. Enter the default Repository password: Mantas61
5. Change the default password by clicking on the **File** menu and choosing the **Change Password** option.
6. Enter the new password and click **OK**.

Configuring OBIEE Connection Pool

Configure the Connection Pool of the Repository by following these steps:

1. Open the \$FIC_HOME/OBIEE/Repository on the Windows machine. The Oracle BI Administration Tool - ECM_6.2.rpd window displays.
2. In the Physical section, expand the D4010S10 folder.
3. Double-click **Connection Pool** to open the Connection Pool Properties window.
4. Enter the following in the Data Source Name text box of the Connection Pool Properties window after modifying <Database Server Host Name> and <Database Name>:
`Data Source Name = (DESCRIPTION=(ADDRESS=(PROTOCOL=TCP) (HOST=<Database Server HostName>) (PORT=1521)) (CONNECT_DATA=(SERVER=DEDICATED) (SERVICE_NAME=<Database Name>)))`
5. Enter the Alert Management schema user in the User Name text box.
6. Enter the Alert Management schema user password in the Password text box.
7. Click **OK**.
8. Expand the folder and test the connection for any table name by right-clicking and then selecting **View Data**.

9. Repeat these steps in the Connection Pools for all the remaining folders in the Physical Layer by providing the following Schema details for all Connection Pools:

Table 10. Connection Pool schemas

Connection Pool	Schema
D4010S10	Alert Management Schema
D5011S10	Report Schema (which is report_user in <OFSBDP Installed Directory>/database/db_tools/mantas_cfg/db_variables.cfg file)
KYC1.1DEV-179	Alert Management Schema
MNTS583	Alert Management Schema
UIC_73	CaseMng connection pool ->Case Management Schema
UIC_73	Security connection pool->Alert Management Schema

10. Click the **File** menu, then click **Save**. A pop-up window displays the following message: *Do you want to check global consistency?*
11. Click **Yes**. A pop-up window displays the following message: *Consistency check didn't find any errors, warning or best practices violations.*
12. Click **OK**.

Deploying OFSECM Report Analytics

To deploy Analytic Reports, follow these steps:

1. Stop the Oracle Process Manager and Notification Server (OPMN) services by executing the following command from <OBIEE Installed Directory>/instances/instance1/bin:
./opmnctl stopall
2. Change the value in the Nqsconfig.ini file located at
<FMW_HOME>/instances/instance1/config/OracleBIServerComponent/coreapplication_obis1/directory
From:
EVALUATE_SUPPORT_LEVEL = 0;
To:
EVALUATE_SUPPORT_LEVEL = 2;
3. Copy the ANALYTICS_REPORT folder from \$FIC_HOME>/OBIEE and place under <OBIEE Installed Directory>/instances/instance1/bifoundation/OracleBIPresentationServicesComponent/coreapplication_obips1/catalog.
4. Login into Enterprise Manager, click the **Business Intelligence** folder on the left hand side and select **coreapplication**, then click the **Deployment** tab
5. Click the **Repository** tab.
6. Click the **Lock and Edit Configuration** tab.
7. Click **Close** on the Confirmation pop-up window.

8. In the Upload BI Server Repository Section, browse the repository file from the Windows machine.
9. Enter the new repository password in the Repository Password and Confirm Password text boxes.
10. In the BI Presentation Catalog section, provide the Catalog Location as `<OBIEE Installed Directory>/instances/instance1/bifoundation/OracleBIPresentationServicesComponent/coreapplication_obips1/catalog/ANALYTICS_REPORT`.
11. Click **Apply**.
12. Click **Activate Changes** and close the Activate Changes pop-up window.
13. Click **Close** on the Confirmation pop-up window.

14. Modify `<OBIEE Installer Directory>/instances/instance1/config/OracleBIPresentationServicesComponent/coreapplication_obips1/instanceconfig.xml` as below:

From:

```
<Security>
```

```
<!--This Configuration setting is managed by Oracle Enterprise Manager Fusion  
Middleware Control-->
```

```
<ClientSessionExpireMinutes>210</ClientSessionExpireMinutes>
```

```
</Security>
```

To:

```
<Security>
```

```
<!--This Configuration setting is managed by Oracle Enterprise Manager Fusion  
Middleware Control-->
```

```
<ClientSessionExpireMinutes>210</ClientSessionExpireMinutes>
```

```
<InIFrameRenderingMode>allow</InIFrameRenderingMode>
```

```
</Security>
```

15. Start the Oracle Process Manager and Notification Server (OPMN) services by executing the following command from `<OBIEE Installed Directory>/instances/instance1/bin`:
`./opmnctl startall`

Post Installation Steps

After installing the OBIEE server, follow these steps:

1. Log in as an OFSECM Admin User with valid username and password. You are navigated to the Home page.
2. Click **FCCM** and then click the **Administration** menu and click **Manage Installation Parameter**.
3. Choose the Parameter Category = "UI" and Parameter Name = "OBIEE"
4. Set Attribute 2 Value = <PROTOCOL>://<OBIEE_SERVER_NAME>:<PORT>
 <PROTOCOL> is web page access PROTOCOL (http or https)
 <OBIEE_SERVER_NAME> is the FQN (fully qualified name)/ host name of the of the server, where OBIEE is installed
 <PORT> is the PORT number used in OBIEE installation. It may change based on the OBIEE version. Give the correct PORT number if it is not 9704.

Note: Placeholder variables are mentioned between angle brackets. Update the placeholders with actual value.

5. Verify Attribute 4 Value. It should be OFSECM application URL. If the same OFSECM application is deployed on different machines, then modify the OFSECM Application URL in Attribute 4 Value appropriately.

Accessing Reports through OFSECM Application

For more information on Accessing Reports, refer to the *Alert Management User Guide*.

Upgrading OFSECM Analytics Reports

Pre-Requisite:

For FCCM 6.2 OBIEE server Version needs to be upgraded to 11.1.1.6.7 OR HIGHER.

Important:

1. If there are no customizations on ECM 6.1 RPD then deploy the FCCM 6.2 RPD available with the FCCM 6.2 Upgrade Kit. If there are customizations on ECM 6.1 RPD, follow these steps.
2. The Oracle BI Administration Tool version 11.1.1.6.7 should be installed before performing these steps.

Step 1: Generate Patch xml file

1. Open the DEV RPD (6.2 RPD) with Admin tool in offline.
2. Go to **File -> Compare**.
3. Choose the PROD RPD (6.1 RPD) as Original Repository.

4. Click **No**. The system will start comparing.
5. Click **Create patch** and choose the name and path to save the xml file.
6. Click **Ok**. The file will be saved.

Step 2 :Merging RPDs

To merge the xml file into production RPD go to the following path on cmd <Oracle BI Administration Tool Installed Path>\oraclebi\orahome\bifoundation\server\bin and execute the patchrpd command as given below:

```
patchrpd [-P modified_rpd_password] -C modified_rpd_pathname  
[-W original_rpd_password] -G original_rpd_pathname -I xml_patch_file_pathname  
-O output_rpd_pathname [-S schema_location] [-8]
```

Where:

modified_rpd_password : The repository password for the modified repository, also called the customer or customized repository.

The password argument for the modified repository is optional. If you do not provide a password argument for the modified repository, you are prompted to enter a password when you run the command. To minimize the risk of security breaches, Oracle recommends that you do not provide a password argument either on the command line or in scripts. Note that the password argument is supported for backward compatibility only, and will be removed in a future release.

modified_rpd_pathname: The name and location of the modified repository.

original_rpd_password: The repository password for the original repository.

The password argument for the original repository is optional. If you do not provide a password argument for the original repository, you are prompted to enter a password when you run the command. To minimize the risk of security breaches, Oracle recommends that you do not provide a password argument either on the command line or in scripts. Note that the password argument is supported for backward compatibility only, and will be removed in a future release.

original_rpd_pathname: The name and location of the original repository.

xml_patch_file_pathname: The name and location of the XML patch file you want to apply.

output_rpd_pathname: The name and location of the RPD output file you want to generate.

schema_location: The name and location of the Oracle BI Server XML schema. If you do not specify a location, patchrpd assumes the schema file is in the default location of ORACLE_HOME/bifoundation/server/bin/xudml1.xsd.

-8: Specifies UTF-8 encoding.

For example:

```
patchrpd -C PROD.rpd -G PROD.rpd -I patch.xml -O patched.rpd
```

```
Give password for PROD repository: my_modified_rpd_password
```

```
Give password for PROD repository: my_original_rpd_password
```

This example applies a patch called patch.xml to the customer.rpd repository, and then generates an output repository called patched.rpd.

