Oracle Financial Services
Foreign Account Tax Compliance Act
Installation Guide - Stage 3

Release 1.0
January 2013

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About this Guide

This guide provides comprehensive instructions for installing and configuring the Oracle Financial Services Foreign Account Tax Compliance Act (herein referred to as OFSFATCA).

This chapter focuses on the following topics:

- Who Should Use this Guide
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- How this Guide is Organized
- Where to Find More Information
- Conventions Used in this Guide

Who Should Use this Guide

The *Oracle Financial Services Foreign Account Tax Compliance Act (OFSFATCA) Installation Guide - Stage 3* is designed for use by Oracle Financial Services application users. Their roles and responsibilities, as they operate within the OFSFATCA application, include the following:

- **Oracle Financial Services Installer:** This user installs and configures the Oracle Financial Services Applications and the client-specific solution sets at a deployment site. This user also installs and upgrades additional solution sets. It requires access to deployment-specific configuration information (For example, machine names, and port numbers).

- **System Administrator:** This user configures, maintains, and adjusts the system 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 step-by-step instructions for installing the OFSFATCA application.

How this Guide is Organized

The *Oracle Financial Services Foreign Account Tax Compliance Act Installation Guide - Stage 3,* includes the following topics:

- Chapter 1, *Preparing to Install*, details prerequisites, environment, and installation checklist necessary for installing OFSFATCA application.

- Chapter 2, *Installation Activities,* describes the step-by-step instructions to install the OFSFATCA application.

- Chapter 3, *Post Installation Activities*, details the steps that need be performed after installing the OFSFATCA application.

Where to Find More Information

For more information about Oracle Financial Services Foreign Account Tax Compliance Act, refer to the following documents:

- *Oracle Financial Services Foreign Account Tax Compliance Act Data Interface Specification Guide, Release 1.0*

- *Oracle Financial Services Foreign Account Tax Compliance Act Configuration Guide, Release 1.0*

- *Oracle Financial Services Foreign Account Tax Compliance Act Assessment Guide, Release 1.0*

- *Oracle Financial Services Foreign Account Tax Compliance Act Release Notes, Release 1.0*

To find additional information about how Oracle Financial Services solves real business problems, see our website www.oracle.com/financial services.

Conventions Used in this Guide

Table 1 lists the conventions used in this guide.

Table 1. Conventions Used in this Guide

Convention	Meaning
Italics	● Names of books, chapters, and sections as references ● Emphasis
Bold	● 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`	● 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>	Substitute input value

Preparing to Install

This chapter provides information about system hardware and software requirements and pre-installation activities. This chapter includes the following topics:

- Environment
- Prerequisites
- Pre-Installation Activities
- Installation Checklist
- Creating Atomic Schema User And Tablespaces
- Configuring the log4j.xml
- Populating the GRC_InstallConfig.xml

Environment

The OFSFATCA application is installed using the hardware and software environments as described in following table:

Table 2. Environment Details

Back- End Environment	Hardware	Software
OEL 5.3/5.5 or RHEL 5.3/5.5	64-bit x 86 architecture	- Oracle 11g R2 (11.2.0.2) - 64 bit - Java1.6.0_[Latest Update]- 64 bit - WebSphere 7.0.0. [Latest Update]- 64bit or WebLogic 10.3.[Latest Update] - 64 bit - Oracle Financial Services Behavior Detection Platform 6.1 - Oracle Financial Services Analytical Applications Infrastructure 7.3
Front-End Client Access		- Java Plug-in 1.6.0_[Latest Update] - Windows XP Service Pack 3 / Windows 7 - Microsoft Internet Explorer 8.0 / 9.0 - Adobe Reader 8.0 or later - Microsoft Office 2007 - Supported Screen Resolutions - 1024*768 and 1280*1024

Prerequisites

The following are the two prerequisites for installing OFSFATCA:

- Oracle Financial Services Behavior Detection Platform (OFSBDP) must be installed and configured. Refer to *Oracle Financial Services Behavior Detection Platform: Installation Guide - Stage1 Release 6.1*, for more information.

  Note: Sections relating to Netviz, Altio, Configuring Informatica, Scenario Manager in *Oracle Financial Services Behavior Detection Platform: Installation Guide - Stage1 Release 6.1* are not relevant to OFSFATCA application installation. Also, Installing and Loading Scenarios are not part of OFSFATCA 1.0 installation.

- Oracle Financial Services Analytical Applications Infrastructure (OFSAAI) must be installed and configured., Refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*, for more information.

Pre-Installation Activities

This section explains the pre-installation activities to be performed before installing the OFSFATCA 1.0

1. Take a backup of the following before proceeding with the OFSFATCA application installation:

- OFSAAI configuration database schema, for more details refer `config_user` installation variable in *Oracle Financial Services Behavior Detection Platform Installation Guide - Stage1*.

- OFSAAI installation directory, for more details refer `USER_INSTALL_DIR` variable in *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide.*

Note: These backups must be kept until the successful installation of the application.

2. Extract the following contents from the media pack to a folder on the machine that hosts the OFSAAI platform:

- `Setup.bin`
- `Setup.sh`
- `validateXMLInputs.jar`
- `CreateAtomicUser.jar`
- `log4j.xml`
- `GRC_InstallConfig.xml`
- `DataModel Folder`

Note: `Setup.bin`,`CreateAtomicUser.jar` and `validateXMLInputs.jar` should be extracted in binary mode. All other files should be extracted/copied in text mode.

Installation Checklist

The following table provides the checklist for installing the OFSFATCA.

Table 3. Installation Checklist

Step No.	Task	Done
1	All the required software/hardware should be installed and configured. For more information on environment details, refer Table 2 on page 1.	☐
2	Ensure that the OFSBDP is installed.	☐
3	Ensure that the OFSAAI is installed and configured. Contact Oracle Support for installing any additional patches on top of OFSAAI platform.	☐
4	Check the OFSFATCA Release Notes and Read Me document for any additional steps to be performed on OFSBDP or OFSAAI. For more details, contact Oracle support.	☐
5	Verify that OFSAAI server is running.	☐
6	Configure `log4j.xml` available with OFSFATCA installer. For more information, refer *Configuring the log4j.xml*, on page 6.	☐
7	Create a copy of `GRC_InstallConfig.xml` as `GRC_InstallConfig.xml.bak` and add values as in `GRC_InstallConfig.xml`. For more information, refer *Populating the GRC_InstallConfig.xml*, on page 7.	☐
8	Make sure SYSDBA user is available. Contact your Database Administrator for more details.	☐
9	Make sure the database data file path is available. This path is required for table space creation for OFSFATCA application. Contact your database administrator for more information about this path.	☐
10	Create OFSFATCA Atomic Schema User. For more information, refer *Creating Atomic Schema User And Tablespaces*, on page 4.	☐
11	Run `config_table_privileges_for_atomic_user.sql` which is available under `FIC_HOME` folder in case of Single tier installation and `FIC_DB_HOME` in case of multi-tier installation.	☐
12	Install OFSFATCA Application. For more information, refer *OFSFATCA Application Installation*, on page 15.	☐
13	Perform Post Installation steps. For more information, refer Chapter 3, *Post Installation Activities,* on page 19.	☐
14	Create users to access OFSFATCA application. For more information, refer to section *FATCA User Setup* in *Oracle Financial Services Foreign Account Tax Compliance Act Configuration Guide, Release 1.0.*	☐
15	Access OFSFATCA application by forming a URL. For more information, refer *Accessing OFSFATCA Application*, on page 20.	☐
16	Perform data population process as described in *Oracle Financial Services Foreign Account Tax Compliance Act Configuration Guide, Release 1.0.*	☐

Creating Atomic Schema User And Tablespaces

This section explains the steps to create OFSFATCA Atomic Schema User, where OFSFATCA application data will be stored in database. To perform this task, user name and password of a SYSDBA user is required.

To create Atomic Schema User, follows these steps:

1. Navigate to the directory where CreateAtomicUser.jar has been extracted.

2. Execute the below command:

   ```
   java -jar CreateAtomicUser.jar
   ```

   Provide values while prompting for input as follows:

Table 4. Atomic Schema Input

Step No.	Task	Action
1.	Enter the Solution Name (KYC/OR/RRS/ECM/CTR/MRM/FATCA)	Enter FATCA.
2	Enter SYSDBA user name.	Enter *SYS* as *SYSDBA*.
3	Enter SYSDBA user password.	Enter password. (It will be hidden)
Verifying sysdba user and password.		
4	Do you want to create a new Tablespace?(Y/N).	Enter Y
5	Enter TableSpace Name for FATCA Data Tablespace.	Enter table space name. For example, `FATCA_DATA`
6.	Enter TableSpace Size (in MB) for FATCA Data Tablespace.	Enter size in MB.
7.	Enter the absolute Path (with filename) for data file for FATCA Data Tablespace.	Enter the database data file path. For more details, contact your database administrator. For example, `/Oracle/ofsfatca/fatca_data.dbf`
8.	Enter TableSpace Name for FATCA Index Tablespace.	Enter table space name. For ex: `FATCA_INDEX`
9.	Enter TableSpace Size (in MB) for FATCA Index Tablespace.	Enter size in MB.
10.	Enter the absolute Path (with filename) for FATCA Index Tablespace.	Enter the data file path. For more details, contact your database administrator. For ex: `/Oracle/ofsfatca/fatca_index.dbf`
11.	Do you want to create a new FATCA Atomic User? (Y/N)	Enter Y.
12.	Enter FATCA Atomic user's Name.	Enter a user name.
13.	Enter FATCA Atomic user's password.	Enter a password. **Note**: Password will be hidden

Table 4. Atomic Schema Input

Step No.	Task	Action
14.	Enter FATCA Atomic user's Default Tablespace	Enter any table space name. For more details contact your database administrator. **Note**: Use the FATCA Data Tablespace created above.
15.	After the above prompt, the following messages displayed on the standard output	• *Running Script...* • *Connection Created* • *Creating tablespace* • *Creating tablespace* • *Creating user* • *Giving Grants to user* • *Execution Completed.*

3. Check the FATCA atomic user created by logging in the FATCA atomic schema.

4. Give privileges to access OFSAAI tables to FATCA atomic schema by following the instructions in the section *Configure Information Domain Schema Privileges* in *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Release 7.3*.

Configuring the log4j.xml

This section explains the steps to configure the `log4j.xml` file which determines the output produced in the logs while installing OFSFATCA.

1. To set the path and name of the installation log file, edit the value of the value attribute in the corresponding param tag.

   ```
   <param name="file" value="<log file name with absolute path>"/>
   ```

   For example:

   ```
   <param name="file" value="/home/fatcauser/fatcainstall.log"/>
   ```

2. To set the append mode, edit the value of value attribute in the corresponding param tag as true or false.

   ```
   <param name="append" value="true"/>
   ```

3. To set the size of the log file, edit the value of value attribute in the corresponding param tag:

   ```
   < param name="MaxFileSize" value="100000kb"/>
   ```

4. To change the information to be displayed in logs, edit the value of value attribute in priority tag.

   ```
   <priority value="<any value from below list>"</priority>
   ```

   Permissible values of attribute are as follows:

   - **debug**: It displays the values of different variables along with the content displayed by info, warn, and fatal.
   - **info:** It displays the flow of control of installer along with the content displayed by warn and fatal.
   - **warn:** Displays all the exceptions occurred during installation along with the content displayed by fatal.
   - **fatal**:Displays all the errors occurred during installation.

Note: Oracle recommends using debug mode for the first time installation. Oracle support would require detailed log file to support any installation related issues.

Populating the GRC_InstallConfig.xml

This section explains the steps to populate the GRC_InstallConfig.xml file. Open the GRC_InstallConfig.xml under OFSFATCA installer kit directory and enter the required input parameters as per the instructions.

This file contains the following four layers:

- GENERAL
- APPLICATION
- DATABASE
- WEB

Layers are divided into different Interaction Groups. The Interaction Group defines the type of Interaction Variables. These variables contain values required for the installation.

Note:

1. For all the installation layers, GENERAL layer information is mandatory.

2. This installation guide assumes that the OFSAAI is installed as Single Tier installation. For more details, refer section Infrastructure Installation Options in *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide.*

3. If the OFSAAI is installed as Multi -Tier Installation, then follow the additional steps provided in the below sections.

Layer - GENERAL

The Layer GENERAL (`<Layer name="GENERAL">`) contains the following nodes to provide the parameter values for the below mentioned Interaction Groups.

Table 5. Interaction Groups in Layer - GENERAL

Interaction Group Name	Details of the values to be assigned to the Interaction Group

OFSAA Infrastructure Customer Code	This node is for installing Customer Code.
	Contact Oracle Support for more details about this code.
	Following is the code for this node:
	`<Interaction Group name="OFSAA Infrastructure Customer Code">`
	`<InteractionVariable name="CUSTID">Customer Code</InteractionVariable>`
	`</InteractionGroup>`

Choose OFSAAI Layer	This node is to configure the FATCA installation as per Installation option (Single - Tier or Multi- Tier) followed while installing OFSAAI platform. Allowed values are as follows:
	
	● 1 - Install selected layer(s) on the same machine where the installer is invoked.
	
	● 0 - Do not Install selected layer(s) on the same machine where the installer is invoked.
	
	For Single -Tier the values to be set as below
	`<InteractionGroup name="Choose OFSAAI Layer">`
	`<InteractionVariable name="APP_LAYER">1</InteractionVariable>`
	`<InteractionVariable name="DB_LAYER">1</InteractionVariable>`
	`<InteractionVariable name="WEB_LAYER">1</InteractionVariable>`
	`</InteractionGroup>`
	
	For Multi -Tier installation, the values needs to be set according to which layer is installed on which machine.
	For example, if DB and WEB layer are on the same machine, then the values to be set as following:
	`<InteractionGroup name="Choose OFSAAI Layer">`
	`<InteractionVariable name="APP_LAYER">0</InteractionVariable>`
	`<InteractionVariable name="DB_LAYER">1</InteractionVariable>`
	`<InteractionVariable name="WEB_LAYER">1</InteractionVariable>`
	`</InteractionGroup>`

Table 5. Interaction Groups in Layer - GENERAL

Interaction Group Name	Details of the values to be assigned to the Interaction Group
Pre-Installation	Some of the pre installation tasks like Information Domain creation, and Segment code creation can be performed by OFSFATCA installer itself; the same can also be performed using OFSAAI user interface as well. Oracle recommends performing Pre Installation tasks by FATCA installer itself by setting value as 1. `<InteractionVariable name="PRE_INSTALL">1</InteractionVariable>` **Note:** For Multi-Tier installation, this value must be set to 1 for Application layer installation. For Database or Web layer installation, this value must be to be set to 0.

Installation Details	For FATCA installation, all the variables under this parameter are to be filled with following values:
	 ● `INFODOM_NAME: Enter FATCA Infodom Name`
	 ● `SEGMENT_CODE: Enter FATCA Segment Code`
	 ● `INFODOM_NAME_2: Enter value NA`
	 ● `SEGMENT_CODE_2: Enter value NA`
	 ● `LOCAL_FTPSHARE_PATH:` Enter the same path given in variable `APP_DRIVE_TM` while installing OFSAAI. Refer to *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide* for more details.
	
	 For Example,
	 `<InteractionGroup name="Installation Details">`
	 `<InteractionVariable name="INFODOM_NAME_1">FATCAINFODOM</InteractionVariable>`
	 `<InteractionVariable name="SEGMENT_CODE_1">FATCASEG</InteractionVariable>`
	 `<InteractionVariable name="INFODOM_NAME_2">NA</InteractionVariable>`
	 `<InteractionVariable name="SEGMENT_CODE_2">NA</InteractionVariable>`
	 `<InteractionVariable name="LOCAL_FTPSHARE_PATH">/home/fatcauser/ftpshare</InteractionVariable>`
	 `</InteractionGroup>`
	
	 Note: While installing Database or Web Layer you should set the value of `INFODOM_NAME` and `SEGMENT_CODE` similar to the value set during Application Layer installation. For more details, refer *OFSFATCA Application Installation*, on page 15. The `LOCAL_FTPSHARE_PATH` can be set to NA while installing Database or Web layer.

Layer - APPLICATION

The Layer APPLICATION (`<Layer name="APPLICATION">`) contains the following nodes to provide the parameter values for the below mentioned Interaction Groups.

Table 6. Interaction Groups in Layer - APPLICATION

Interaction Group Name	Details of the values to be assigned to the Interaction Group

Pre-Installation Configuration	If `PRE_INSTALL` field in `GENERAL` Layer has been set as 1, then following fields need to be configured as specified, otherwise leave the values for all the fields as such and proceed with the next step
	The valid values for each variable is given as follows:
	● `INFODOM_FLAG`: Enter value as 1
	
	● `INFODOM_COUNT`: Enter value as 1
	
	● `DATAMODEL_FLAG`: Enter value as 1
	
	● `DATAMODEL_TYPE`: Enter value as 1
	
	● `DM_FILE_NAME`: Enter value as the datamodel file name
	
	Note: This file is present under the *DataModel* folder under *OFSFATCA Installer Directory.*
	● `DATAMODEL_PATH`: Enter value as the absolute path datamodel file (without datamodel file name)
	
	● `ETL_CREATION`: Enter value as 1
	
	● `SOURCE_NAME`: Enter a name by which Sources and Application will be created
	
	For example,
	`<InteractionGroup name="PRE-INSTALLATION CONFIGURATION">`
	`<InteractionVariable name="INFODOM_FLAG">1</InteractionVariable>`
	`<InteractionVariable name="INFODOM_COUNT">1</InteractionVariable>`
	`<InteractionVariable name="DATAMODEL_FLAG">1</InteractionVariable>`
	`<InteractionVariable name="DATAMODEL_TYPE">1</InteractionVariable>`
	`<InteractionVariable name="DM_FILE_NAME">DM_FATCA.xml</InteractionVariable>`
	`<InteractionVariable name="DATAMODEL_PATH">/home/fatcauser/Installer_Kit/DataModel</InteractionVariable>`
	`<InteractionVariable name="ETL_CREATION">1</InteractionVariable>`
	`</InteractionGroup>`
	`<InteractionVariable name="SOURCE_NAME">FATCASource</InteractionVariable>`

Layer - DATABASE

The Layer DATABASE (`<Layer name="DATABASE">`) contains the following nodes to provide the parameter values for the following Interaction Group.

Table 7. Interaction Groups in Layer -DATABASE

Interaction Group Name	Details of the values to be assigned to the Interaction Group

Database Details	The database connection details to be given in this Interaction group variable
	● `DATABASE_URL`: Enter `jdbc:oracle:thin:@<database server name>:<port>:<database name>`
	
	Note: Refer DBSERVER and DBNAME variables given in Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration.
	
	● `FICMASTER_DRIVER`: Enter `oracle.jdbc.driver.OracleDriver`
	For Example,
	`<InteractionGroup name="Database Details" >`
	`<InteractionVariable name="DATABASE_URL">jdbc:oracle:thin:@unix.oracle.com:1521:FATCADB</InteractionVariable>`
	`<InteractionVariable name="FICMASTER_DRIVER">oracle.jdbc.driver.OracleDriver</InteractionVariable>`
	`</InteractionGroup>`

Table 7. Interaction Groups in Layer -DATABASE

Interaction Group Name	Details of the values to be assigned to the Interaction Group
Database Schema Details	The database schema details where data need to be stored and from where it is provided. The valid values are as follows: • `BUSINESS_SCHEMA_USER`: It is same as `business_schema_owner` given while installing OFSBDP. • `MANTAS_SCHEMA_USER`: It is same as `mantas_schema_owner` variable given while installing OFSBDP. • `TABLE_SPACE`: It is same as name entered while creating OFSFATCA atomic schema in prompt enter TableSpace Name for FATCA Data Tablespace. • `INDEX_TABLE_SPACE`: It is same as name entered while creating OFSFATCA atomic schema in promt enter TableSpace Name for FATCA Index Tablespace. For the following variables, enter the value as NA: • `MARKET_SCHEMA_USER` • `INGEST_USER` • `CASE_SCHEMA_USER` • `KDD_SCHEMA_USER` • `KDD_ALG_SCHEMA_USER` • `KDD_WEB_SCHEMA_USER` • `KDD_MNR_SCHEMA_USER` • `DB_UTIL_USER` • `KDD_ALTIO_USER` • `KDD_ALGORITHM` • `KDD_ANALYST` For Example, <code>\<InteractionGroup name="Databse Schema" \></code> <code>\<InteractionVariable name="BUSINESS_SCHEMA_USER">business\</InteractionVariable></code> <code>\<InteractionVariable name="MARKET_SCHEMA_USER">NA\</InteractionVariable></code> <code>\<InteractionVariable name="MANTAS_SCHEMA_USER">mantas\</InteractionVariable></code> <code>\<InteractionVariable name="KDD_WEB_SCHEMA_USER">NA\</InteractionVariable></code> <code>\<InteractionVariable name="KDD_SCHEMA_USER">NA\</InteractionVariable></code> <code>\<InteractionVariable name="KDD_MNR_SCHEMA_USER">NA\</InteractionVariable></code> <code>\<InteractionVariable name="DB_UTIL_USER">NA\</InteractionVariable></code>

Table 7. Interaction Groups in Layer -DATABASE

Interaction Group Name	Details of the values to be assigned to the Interaction Group
	``` <InteractionVariable name="KDD_ALG_SCHEMA_USER">NA</InteractionVariable> <InteractionVariable name="KDD_ALTIO_USER">NA</InteractionVariable> <InteractionVariable name="INGEST_USER">NA</InteractionVariable> <InteractionVariable name="KDD_ALGORITHM">NA</InteractionVariable> <InteractionVariable name="KDD_ANALYST">NA</InteractionVariable> <InteractionVariable name="TABLE_SPACE">FATCA_DATA</InteractionVariable> <InteractionVariable name="INDEX_TABLE_SPACE">FATCA_INDEX</InteractionVar iable> </InteractionGroup> ```
ADMIN Tools Context Name	Enter NA for the variable `ADMIN_CONTEXT_NAME` For Example, ``` <InteractionGroup name="AdminTools- Context Root Name"> <InteractionVariable name="ADMIN_CONTEXT_NAME">NA</InteractionVariable> </InteractionGroup> </Layer> ```
Source Jurisdiction Code Details	This variable specifies the Jurisdiction code where FATCA is deployed. This Jurisdiction Code is used to identify the Account and Customer Information for which FATCA report is to be generated. **Note:** This Jurisdiction code should be same as the corresponding Jurisdiction code in ACCOUNT and CUSTOMER tables in BUSINESS Schema For Example: ``` <InteractionVariable name=" SRC_JURISDICTION_CODE ">AMEA </InteractionVariable> </InteractionGroup> ```

Layer - WEB

The Layer WEB (`<Layer name="WEB">`) contains the following nodes to provide the parameter values for the following mentioned Interaction Groups..

Table 8. Interaction Groups in Layer -WEB

Interaction Group Name	Details of the values to be assigned to the Interaction Group

Database Details	This is the database schema where OFSAAI is installed. The `FICMASTER_USER` variable is same as `config_user` used while installing OFSBDP. For more information, refer *Oracle Financial Services Behavior Detection Platform: Installation Guide - Stage1*.
	
	For Example,
	`<InteractionVariable name="FICMASTER_USER">configuser</InteractionVariable>`
	`</InteractionGroup>`

Database Schema Details	Enter NA as value for all variables user this node. For example.
	`<InteractionGroup name="Database Schema Details" >`
	`<InteractionVariable name="BUSINESS_SCHEMA_USER">NA</InteractionVariable>`
	`<InteractionVariable name="MARKET_SCHEMA_USER">NA</InteractionVariable>`
	`<InteractionVariable name="MANTAS_SCHEMA_USER">NA</InteractionVariable>`
	`<InteractionVariable name="KDD_WEB_SCHEMA_USER">NA</InteractionVariable>`
	`<InteractionVariable name="KDD_SCHEMA_USER">NA</InteractionVariable>`
	`<InteractionVariable name="KDD_MNR_SCHEMA_USER">NA</InteractionVariable>`
	`</InteractionGroup>`

`OBIEE Reports Installation`	`Enter NA for the variable OBIEE_REPORTS`
	`For example,`
	`<InteractionGroup name="OBIEE Reports Installation" >`
	`<InteractionVariable name="OBIEE_REPORTS">NA</InteractionVariable>`
	`</InteractionGroup>`
	`</Layer>`

CHAPTER 2   *Installation Activities*

OFSFATCA comprises the components that are installed in the Database, Application and Web layers. If OFSAAI is installed in a Multi -Tier option, then OFSFATCA installer must be invoked on each machine that hosts different tiers. This chapter describes the installation process in which the OFSAAI is installed using Single -Tier option.

Note: For a Single-Tier installation, the installer is required to be invoked only once on the machine that hosts all the OFSAAI Platform tiers. For a Multi-Tier installation, the installation should be done in the following order:

- Application Layer
- Database Layer
- Web Layer

OFSFATCA Application Installation

To install OFSFATCA application, follow these steps:

1. Verify that OFSAAI application server is running.

2. Verify that the user performing the installation has *Execute Permission* for the OFSFATCA Installer files.

3. Verify that `ftpshare` directory has read, and write permission for the user performing the installation. For more details refer to `LOCAL_FTPSHARE_PATH` in the Layer - GENERAL section in this document.

4. Before starting the OFSFATCA installation, execute `.profile` to set the environment variables, by executing the following command from home directory of user

   `. ./.profile`

5. Navigate to the directory where the FATCA installer files are present and invoke the `Setup.sh` with the argument `SILENT`.

   `./Setup.sh SILENT`

6. Enter the following values when prompted by `Setup.sh`

Table 9. Installation Prompt Values

Prompt	Action
Enter `INFODOM_1`	Enter the name of the Information Domain The name specified is of minimum six characters and does not contain any special characters or extra spaces. The length of the name does not exceed 20 characters.
Enter `INFODOM_DESCRIPTION _1`	Enter description of the Information Domain Note: The description should not be null and must not exceed 50 characters

Table 9. Installation Prompt Values

Prompt	Action
Enter ATOMIC_SCHEMA_NAME_1	Enter the created FATCA atomic schema name. For more information, refer *Creating Atomic Schema User And Tablespaces*, on page 4. **Note**: Make sure that a TNS entry with this name is created under `tnsnames.ora` file
Enter ATOMIC_SCHEMA_USER_1	Enter the created FATCA atomic schema user name. For more information, refer *Creating Atomic Schema User And Tablespaces*, on page 4.
Enter ATOMIC_SCHEMA_PASSWORD_1	Enter the created FATCA atomic schema password. (It will be hidden). For more information, refer *Creating Atomic Schema User And Tablespaces*, on page 4.
Enter SEGMENT_CODE_1	Enter a code for the Segment to be created corresponding to the information domain mentioned in first prompt. This code should be same as entered in GRC-INSTALLconfig.xml. The name specified is of minimum six characters and does not contain any special characters or extra spaces. The length of the name does not exceed 10 characters.
Enter APP_LAYER_LOG_PATH	Enter an existing path in unix server on which the Application layer is being installed. For example, `<App_Layer_Installed_Machine>/Logs` **Note**: The installer will create *Logs* directory inside the given path. The logs will be generated inside this logs directory while doing document upload and excel upload .
Enter DB_LAYER_LOG_PATH	Enter an existing path in unix server on which the Database layer is being installed. For example, `<App_Layer_Installed_Machine>/Logs` **Note**: The installer will create *Logs* directory inside the given path. The logs will be generated inside this logs directory while doing document upload and excel upload .

Note: For Multi -Tier installation, while installing DB and Web layer, installer will not ask for APP_LAYER_PATH or DB_LAYER_PATH.

Subsequently, the Installation process starts and after a successful installation, Installation Complete message appears on the screen. Analyze the following log files for any error occurred during installation:

1. GRC_PreInstallValidations.log, which is created from where the installation is invoked.

2. `SolutionSetup_InstallLog.log`, which is created in FATCA installed directory. For more information on `USER_INSTALL_DIR` variable, refer to the Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration.

3. The log file given in `log4j.xml` as per section Configuring the `log4j.xml`.

CHAPTER 3   *Post Installation Activities*

Once the installation of the OFSFATCA application is completed, the following post installation steps need to be performed:

- Web Layer Configurations
- Accessing OFSFATCA Application
- TNS Entry for OFSFATCA Infodom
- Creating User and User Group Mapping

Web Layer Configurations

1. Changes in `MapRenderer.jsp`

   Open `MapRenderer.jsp` file under `<OFSAAI installed directory>/ficweb/webroot/formsFramework/formsrenderer/MapRenderer.jsp` file.

   Search for text `<script src="script/ajax.js"></script>`

   In the next line add the following text:

   `<script src="script/fatcaSolution.js"></script>`

   Note: `<OFSAAI installed directory>` is same as `USER_INSTALL_DIR` variable. For more information, refer *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration*

2. Changes in `messagesConstant.jsp`

   Open `messagesConstant.jsp` file under `<OFSAAI installed directory>/ficweb/webroot/formsFramework/formsrenderer`

   Search for tag `<%--/** Include message constants JSP file for solution specific messages only*/-- %>`

   In the next line add the following tag,

   `<%@ include file="fatcaMessagesConstant.jsp"%>`

3. Navigate to `<OFSAAI installed directory>/ficweb` and execute `ant.sh`. This will create `<CONTEXT_PATH>.ear` and `<CONTEXT_PATH>.war` files under the same directory.

4. Create a data sources for FATCA Information Domain by providing OFSFATCA atomic schema user name and password. For more information, refer section *Create Data Source* in *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide.*

5. Deploy `<CONTEXT_PATH>.ear` generated in Step 3 in the Web Application Server.

6. Stop OFSAAI Application Server and Web Application Server.

7. Start OFSAAI Application Server. For more information, refer Start Infrastructure in *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide.*

8. Start Web Application Sever.

9. Start ICC and Agent Server. Refer to *Start/Stop Infrastructure Services* section in *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide.*

Accessing OFSFATCA Application

Access OFSFATCA application using the following URL:

`https:// <Web application server name>:<port>/<context>`

Use the following references to determine the correct URL:

- **Web application Server**: Refer `WEBSERVER` variable in `OFSAAI_InstallConfig.xml`

- **Port**: Refer `SERVLETPORT` variable in `OFSAAI_InstallConfig.xml`

- **Context**: Refer `CONTEXT_PATH` variable in `OFSAAI_InstallConfig.xml`

For more details about `OFSAAI_InstallConfig.xml`, refer *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide.*

For more details about OFSFATCA user interface workflows, refer *Oracle Financial Services Foreign Account Tax Compliance Act Assessment Guide 1.0*

For populating data and configuring OFSFATCA user interface, refer sections on *Data Ingestion* in *Oracle Financial Services Foreign Account Tax Compliance Act Configuration Guide 1.0*

TNS Entry for OFSFATCA Infodom

The following configuration is required for running OFSFATCA Batch Execution under OFSFATCA application. This TNS entry should be added under the machine where OFSAAI Application Server is running.

- TNS entry for Infodom database name under `tnsnames.ora`

For Example,

If the Infodom Schema Name is `FATCAATOM`, then there should be a TNS entry as follows:

```
FATCAATOM =
  (DESCRIPTION =
    (ADDRESS = (PROTOCOL = TCP)(HOST = ICLV159DOR)(PORT = 1521))
    (CONNECT_DATA =
      (SERVER = DEDICATED)
```

```
                    (SERVICE_NAME = MANTAS)
         )
         )
```

Creating User and User Group Mapping

Refer to *Oracle Financial Services Foreign Account Tax Compliance Act Configuration Guide* 1.0 for creating user and mapping users to respective user groups.