

# Installation Guide

## Oracle Financial Services: Personal Trading Approval

*Release 1.0*  
*December 2013*





# **Installation Guide**

## **Oracle Financial Services:**

Personal Trading Approval

*Release 1.0*  
*December 2013*

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# About this Guide

This guide provides comprehensive instructions for installing and configuring Oracle Financial Services Personal Trading Approval (herein referred to as OFSPTA).

This chapter focuses on the following topics:

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

## Who Should Use this Guide

The *Oracle Financial Services Personal Trading Approval Installation Guide* is designed for use by Oracle Financial Services Personal Trading Approval application users. Their roles and responsibilities, as they operate within the OFSPTA application, include the following:

- **Oracle Financial Services Installer:** This user installs and configures Oracle Financial Services Personal Trading Approval and 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.

## How this Guide is Organized

The *Oracle Financial Services Personal Trading Approval Installation Guide* includes the following chapters:

- Chapter 1, *Preparing to Install*, details prerequisites, environment, and installation checklist necessary for installing OFSPTA.
- Chapter 2, *Installation Activities*, describes the step-by-step instructions to install the OFSPTA application and details the steps that are to be performed after installing OFSPTA.

## **Where to Find More Information**

For more information about Oracle Financial Services Personal Trading Approval, refer to the following documents:

- *Oracle Financial Services Personal Trading Approval User Guide*
- *Configuration Guide*
- *Administration Guide*
- *Data Interface Specification (DIS) Guide*

To find more information about Oracle Financial Services and our complete product line, visit our web site at [www.oracle.com/financialservices](http://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**

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

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

- Environment Details
- Pre-requisites
- Pre-Installation Activities
- Installation Checklist

## ***Environment Details***

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

**Table 2. Environment Details**

<b>Back-End Environment</b>	<b>Hardware</b>	<b>Software</b>
OEL 5.3/5.5 or RHEL 5.3/5.5 or Oracle Solaris 10 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
		Oracle Financial Services Financial Crime and Compliance Management 6.2.2
		Oracle Financial Services Analytical Application Infrastructure 7.3.3.1.0
		OBIEE 11.1.1.7.0
		<b>Note:</b> Contact Oracle Support for any mandatory patch requirement before installing Personal Trading Approval.
<b>Front-End Client Access</b>	<b>Software</b>	
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	

## Pre-requisites

The following prerequisites are required for installing OFSPTA:

1. Oracle Financial Services Behavior Detection Platform (OFSBDP) must be installed and configured. Refer to the *Installation Guide - Stage1 Release 6.2.2*, for more information.

**Note:** If you are already using Oracle Financial Services Financial Crime and Compliance Management 6.2.2 (OFSFCCM 6.2.2), then it is not required to install OFSBDP again.

2. 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 7.3.3.1.0*, for more information.

**Note:** If you already have an OFSAAI 7.3.3.1.0 platform installed then you can use same platform for OFSPTA installation.

3. Oracle Financial Services Financial Crime and Compliance Management 6.2.2 (OFSFCCM 6.2.2) must be installed and configured. For more information on installing and configuring, refer to the *Installation Guide, Stage 3 Release 6.2.2*.

**Note:** If you already have OFSECM 6.2.2 installed, do not install it again.

## Pre-Installation Activities

This section explains activities to be performed before installing OFSPTA.

The OFSPTA installer will update OFSAAI platform files and database tables. The uninstallation functionality is also available with the OFSPTA installer. However, to avoid any unprecedented errors, take a backup of the following before installing OFSPTA:

- **OFSAAI configuration database schema:** For more information, refer to the `config_user` installation variable in the *Installation Guide - Stage 1* or refer to the `DBUSER` installation variable in the *OFSAAI Installation Guide*.
- **OFSAAI installation directory:** For more information, refer to the `USER_INSTALL_DIR` installation variable in the *OFSAAI Installation Guide*.
- **ftpshare directory:** For more information, refer to the `DB_DRIVE_TM`, `APP_DRIVE_TM` and `WEB_DRIVE` installation variable in the *OFSAAI Installation Guide*.

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`
- `log4j.xml`
- `GRC_InstallConfig.xml`

Setup.bin and validateXMLInputs.jar should be copied in binary mode. All other files should be copied in text mode. After copying these files in the UNIX server, provide Read, Write, and Execute permission on these files to the UNIX user being used to install OFSPTA.

## Installation Checklist

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

**Table 3. Installation Checklist**

Step No.	Task	Done
<b>General</b>		
1	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 1.	
2	Ensure that OFSBDP is installed and configured. You can ignore this step if you are already using OFSFCCM 6.2.2.	
3	Ensure that OFSAAI is installed and configured. You can ignore this step if you already have an OFSAAI platform.	
4	Ensure that OFSFCCM 6.2.2 is installed. You can ignore this step if you are already using OFSFCCM 6.2.2.	
5	Check the OFSPTA 1.0 <i>Release Notes</i> document for any additional steps to be performed on OFSBDP, OFSFCCM 6.2.2, or OFSAAI before installing OFSPTA. For more details, contact Oracle support.	
6	Create a copy of GRC_InstallConfig.xml as GRC_InstallConfig.xml.bak and add values in GRC_InstallConfig.xml. For more information, refer to section <i>Populating the GRC_InstallConfig.xml File</i> , on page 3.	
7	Install OFSPTA Application. For more information, refer to <i>OFSPTA Application Installation</i> on page 11.	
8	Perform Post Installation steps. For more information, refer to <i>Post-Installation Activities</i> on page 12.	

## Populating the GRC\_InstallConfig.xml File

This section explains the variable values to populate the GRC\_InstallConfig.xml file. Open the existing GRC\_InstallConfig.xml under the OFSPTA installer kit directory and enter the required input parameters.

This file contains the following sections:

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

**Note:**

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

**Layer- GENERAL**

The GENERAL layer (<Layer name="GENERAL">) contains the following placeholders to provide parameter values specific to your environment.

**Table 4. Placeholders in Layer - GENERAL**

Placeholder	Description	Example
##CUST_ID##	This variable is used to store the Customer ID. Replace this placeholder with Customer Code used during OFSAAI Installation. Refer to the Customer Code variable within the OFSAAI_InstalConfig.xml in the <i>OFSAAI Installation Guide</i> .	<VariableGroup name="OFSAA_INFRASTRUCTURE_CUSTOMER_CODE"> <Variable name="CUSTID">OFSAAICUSTID</Variable> </VariableGroup>
##PRE_INSTALL##	This variable is used to identify whether the OFSPTA installer will perform the following Pre-Installation activity: Data Model Upload for OFSPTA atomic schema. Replace this placeholder with either of the following values: 1 - If the user wants this Pre-Installation step to be performed by the installer 0 - If the user has performed this step through the OFSAAI UI. <b>Note:</b> Oracle recommends that the OFSPTA Installer performs these steps.	<VariableGroup name="PRE_INSTALLATION"> <Variable name="PRE_INSTALL">1</Variable> </VariableGroup>
##INFODOM_1##	This variable is used to specify the OFSPTA Information Domain (Infodom) name. Replace this placeholder with the Alert Management Infodom name provided during OFSFCCM Installation.	<Variable name="INFODOM_NAME">AMINFO</Variable>
##SEGMENT_1##	This variable is used to specify the OFSPTA Segment Code. Replace this placeholder with the Alert Management Segment Code provided during OFSFCCM Installation.	<Variable name="SEGMENT_CODE">AMSEG</Variable>
##FTPSHARE_PATH##	This variable is used to identify the common share area path. Replace this placeholder with the same path as configured during OFSAAI Installation. Refer to section APP_DRIVE_TM while installing OFSAAI. For more information, refer to the <i>Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide</i> .	<VariableGroup name="LOCAL_FTPSHARE_PATH"> <Variable name="FTPSHARE_PATH">/home/ftpshare</Variable> </VariableGroup>

**Table 4. Placeholders in Layer - GENERAL**

Placeholder	Description	Example
##FICMASTER_DRIVE R##	Replace this placeholder with the OFSAAI Configuration Schema Database Driver for the connection purpose. <b>Note:</b> Refer to value of DEFAULT_DRIVER parameter in the file- DynamicServices.xml under \$FIC_APP_HOME/conf for value of this parameter	<Variable name="FICMASTER_DRIVER"> oracle.jdbc.driver.OracleDriver</Variable>
##FICMASTER_USE R##	Replace this placeholder with the value of OFSAAI Configuration Schema user.	<Variable name="FICMASTER_USER">RE VELEUS</Variable>

## Layer - APPLICATION

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

**Table 5. Placeholders in Layer - APPLICATION**

Placeholder	Description	Example
##APP_LAYER##	This variable is used to identify the OFSPTA Application Layer component to be installed on the same UNIX server where the OFSAAI application layer is installed. Replace this placeholder with: 1 - if Application Layer component is to be installed 0 - if Application Layer component is not to be installed  Replace the place holder with 1 if OFSAAI is installed as Single - Tier mode.  <b>Note:</b> 1. OFSPTA installer to be invoked in each machine where each layer is hosted in case of Multi-Tier OFSAAI setup. 2. For Multi-Tier installation, this value must be set to 1 for Application layer installation. For Database or Web layer installation, this value must set to 0. 3. For Multi -Tier installation, OFSPTA installer to be invoked in the UNIX server in the following order: <ul style="list-style-type: none"> <li>● Application layer</li> <li>● Database Layer</li> <li>● Web Layer</li> </ul>	
##MODEL_UPLOAD_F LAG_1##	This variable is used to identify whether the Data Model Upload for OFSPTA is to be done through the Installer. Replace this placeholder with 1- if the Data Model Upload for OFSPTA is to be done through the Installer 0 - if the Data Model Upload for OFSPTA is already completed	<ActionGroup name="DATA_MODEL_UPLOAD" flag="1">

**Table 5. Placeholders in Layer - APPLICATION**

Placeholder	Description	Example
##DM_TYPE_1##	<p>This variable is used to identify the type of Data Model upload for OFSPTA that is to be done through the Installer.</p> <p>This value is required only if ##MODEL_UPLOAD_FLAG_1## and ##PRE_INSTALL## have been replaced by 1.</p> <p>Replace this placeholder with the type of Data Model upload to be performed. Allowable value is 0.</p>	<pre>&lt;Variable name="DATAMODEL_TYPE"&gt;0&lt;/Variable&gt;</pre>
##LOGICAL_UPLOAD_1##	<p>This variable is used to identify if the Data Model Upload for OFSPTA is to be Logical or otherwise.</p> <p>This value is required only if ##MODEL_UPLOAD_FLAG_1## and ##PRE_INSTALL## have been replaced by 1.</p> <p>Replace this placeholder with the type of Data Model upload to be performed. Allowable value is 0.</p>	<pre>&lt;Variable name="LOGICAL_UPLOAD"&gt;0&lt;/Variable&gt;</pre>
##DM_FILE_PATH_1##	<p>This variable is used to identify the Data Model file path used for the OFSPTA Data Model upload.</p> <p>This value is required only if ##MODEL_UPLOAD_FLAG_1## and ##PRE_INSTALL## have been replaced by 1.</p> <p>Replace this placeholder with the absolute path of the Data Model file available with the Installer kit.</p>	<pre>&lt;Variable name="DATAMODEL_FILE_PATH"&gt;/ home/OFSPTAKit/DataModel/PTA _DataModel.xml&lt;/Variable &gt;</pre>

## 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 6. Placeholders in Layer - DATABASE**

Placeholder	Description	Example
##DB_LAYER##	<p>This variable is used to identify the OFSPTA Database Layer component to be installed on the same UNIX server where the OFSAAI Database layer is installed.</p> <p>Replace this placeholder with</p> <ul style="list-style-type: none"> <li>● 1 - if DATABASE Layer component is to be installed.</li> <li>● 0 - if DATABASE Layer component is not to be installed</li> </ul> <p>Replace the place holder with 1if OFSAAI was installed as single - tier mode.</p> <p><b>Note:</b></p> <ol style="list-style-type: none"> <li>1. OFSPTA installer should be invoked in each machine where each layer is hosted in a Multi-Tier OFSAAI setup.</li> <li>2. For Multi-Tier installation, this value must be set to 1 for Database layer installation. For Application or Web layer installation, this value must be to be set to 0.</li> <li>3. For Multi -Tier installation, OFSPTA installer should be invoked in the UNIX server in the following order <ul style="list-style-type: none"> <li>● Application layer</li> <li>● Database Layer</li> <li>● Web Layer</li> </ul> </li> </ol>	
##DB_URL##	<p>Replace this placeholder with OFSAAI Configuration Schema Database URL for connection purpose.</p>	<pre>&lt;Variable name="DATABASE_URL"&gt;jdbc:oracle:thin:@DBSERVER.ORACLE.COM:1521:ORCL&lt;/Variable&gt;</pre> <p><b>Note:</b> Refer to the value of DEFAULT_CONNECTION_URL parameter in the file &lt;Application layer installed directory&gt;/conf/DynamicServices.xml</p>
##DB_DRIVER##	<p>Replace this placeholder with the OFSAAI Configuration Schema Database Driver for connection purpose.</p>	<pre>&lt;Variable name="FICMASTER_DRIVER"&gt;oracle.jdbc.driver.OracleDriver&lt;/Variable&gt;</pre> <p><b>Note:</b> Refer to the value of the DEFAULT_DRIVER parameter in the file &lt;Application layer installed directory&gt;/conf/DynamicServices.xml</p>

**Table 6. Placeholders in Layer - DATABASE**

Placeholder	Description	Example
##CONFIGURATION_USER##	Replace this placeholder with the value of OFSAAI Configuration Schema user.	<pre>&lt;Variable name="FICMASTER_USER"&gt;CONFIG _USER&lt;/Variable&gt;</pre> <p>Refer to the config_user Installation variable in the <i>Installation Guide - Stage 1</i> or refer to the DBUSER installation variable in the <i>OFSAAI Installation Guide</i>.</p>
##BUSINESS_USER##	Replace this placeholder with the value of Business Schema user, as configured during OFSBDP Installation.	<pre>&lt;Variable name="BUSINESS_SCHEMA_USER &gt;BUSINESS&lt;/Variable&gt;</pre>

## 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 7. Placeholders in Layer - WEB**

Placeholder	Description	Example
##WEB_LAYER##	<p>This variable is used to identify OFSPTA Web Layer component to be installed on the same UNIX server where the OFSAAI Web layer is installed.</p> <p>Replace this placeholder with</p> <p>1 - if WEB Layer component is to be installed</p> <p>0 - if WEB Layer component is not to be installed</p> <p>Replace the place holder with 1 if OFSAAI is installed as Single - Tier mode.</p> <p><b>Note:</b></p> <ol style="list-style-type: none"> <li>1. OFSPTA installer to be invoked in each machine where each layer is hosted in case of Multi-Tier OFSAAI setup.</li> <li>2. For Multi-Tier installation, this value must be set to 1 for Web layer installation. For Application or Database layer installation, this value must be to be set to 0.</li> <li>3. For Multi -Tier installation, the OFSPTA installer to be invoked in the UNIX server in the following order: <ul style="list-style-type: none"> <li>● Application Layer</li> <li>● Database Layer</li> <li>● Web Layer</li> </ul> </li> </ol>	<pre>&lt;Layer name="WEB" flag="1"&gt;</pre>
##CONFIGURATION_USER##	<p>Replace this placeholder with the value of OFSAAI Configuration Schema user.</p>	<pre>&lt;Variable name="FICMASTER_USER"&gt;R EVELLEUS&lt;/Variable&gt;</pre> <p><b>Note:</b> Refer to the config_user Installation variable in the <i>Installation Guide - Stage 1</i> or refer to the DBUSER installation variable in the <i>OFSAAI Installation Guide</i>.</p>
##OBIEE##	<p>This is to specify whether the Oracle Business Intelligence Enterprise Edition (OBIEE) needs to be integrated in the setup or not.</p> <p>Replace this placeholder with</p> <p>0- if OBIEE reports related files are not be installed</p> <p>1 - if OBIEE reports related files are to be installed</p>	<pre>&lt;Variable name="OBIEE_REPORTS"&gt;1&lt;/Variable&gt;</pre>



OFSPPTA is comprised of the components that are installed in the Application, Database, and Web layers. If OFSAAI is installed in a Multi-Tier option, then the OFSPPTA installer must be invoked on each machine that hosts different layers. This chapter describes the installation process in which the OFSAAI is installed using the Single-Tier option. This chapter covers the following topics:

- OFSPPTA Application Installation
- Post-Installation Activities
- Uninstalling OFSPPTA
- Upgrading OFSECM Analytics Reports

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

- Application Layer
- Database Layer
- Web Layer

## ***OFSPPTA Application Installation***

To install OFSPPTA, follow these steps:

1. Verify that the OFSAAI server is running.
2. Verify that the OFSPPTA Installer files having execute permission for the user who is performing the installation.
3. Verify that the ftpshare directory has read and write permission for the user who is performing the installation. For more details refer to LOCAL\_FTPSHARE\_PATH in GRC\_InstallConfig.xml.
4. Before starting the OFSPPTA installation, execute .profile to set the environment variables, by executing the following command from the home directory of the user installing OFSPPTA.  

```
.. ./profile
```
5. Navigate to the directory where the OFSPPTA installer files are present and invoke the Setup.sh with the parameter SILENT.  

```
./Setup.sh SILENT
```
6. Enter the following values when prompted by Setup.sh:
  - Business Schema Password: Enter the password for the Business schema user.
  - Re-enter Business Schema Password: Enter the same password entered in the previous step.

- Wait in the same UNIX session till you see the following message:

*Installation Complete.*

*Exit status of installer: 0*

*Installation completed. cross-check logs for any errors*

7. Analyze the following log files for any error which may have occurred during installation:

- `SolutionSetup_InstallLog.log`, which is created in the OFSPTA installed directory. For more information on the installation directory, refer to the `USER_INSTALL_DIR` installation variable in the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide*.
- `PTA_LOG.log` created at the same path from where installer was invoked.

## **Post-Installation Activities**

Once the installation of OFSPTA is completed, you must perform the following post installation steps:

- Web Layer Configuration
- Creating Users, Load Reference Data, and Other Related Activities
- Loading Personal Trading Approval Scenarios
- Accessing OFSPTA

## **Web Layer Configuration**

To configure the Web Layer, follow these steps:

1. Navigate to `$FIC_HOME/ficweb` on the server hosting the WEB Layer.
2. Execute the following command to recreate the ear file.  
`$ ./ant.sh`
3. Login to the Web Application server console. For more information, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide, Release 7.3*.
4. Un-deploy the already deployed `<CONTEXT_PATH>.ear` file.
5. Deploy the new `<CONTEXT_PATH>.earfile`, present at `<OFSAAI installed directory>/ficweb`, in the Web Application Server.

**Note:** Refer to section *Post Installation Configuration* in the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide, Release 7.3* for steps to deploy in different type of Web application servers.

6. Stop OFSAAI and the Web Application Server.
7. Start the OFSAAI server. For more information, refer to the *Start Infrastructure* section in the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide*.
8. Start the Web Application Server.

## Creating Users, Load Reference Data, and Other Related Activities

To create users, load reference data, and perform other related activities, follow the steps provided in the *Administration Guide* for the respective reports.

Personal Trading Approval users must be created and mapped to the following groups.

- CREMPLOYEEUG
- CRANALYSTUG
- CRSUPVISRUG
- CRIPMANAGERUG
- CRIPMGRSUPVSRUG
- CRQUESTIONUG

For more information, refer to the section *User Groups and Roles* in the *Administration Guide*.

## Loading Personal Trading Approval Scenarios

Install the following scenario patches to load Personal Trading Approval Scenarios.

- Patch 6.2.2.0.20S
- Patch 6.2.2.0.21S
- Patch 6.2.2.0.22S

Contact Oracle Support for the above patches.

## Accessing OFSPTA

Access the OFSPTA application by logging in as and OFSPTA user using the following URL:

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

If you are integrating OFSPTA with OFSFCCM, then login with the OFSFCCM user using this URL and click **Personal Trading Approval** in the Left Hand Side menu.

Use the following references to determine the correct URL:

- **Web application Server:** Refer to the WEBSERVER variable in OFSAAI\_InstallConfig.xml
- **Port:** Refer to the SERVLETPORT variable in OFSAAI\_InstallConfig.xml
- **Context:** Refer to the CONTEXT\_PATH variable in OFSAAI\_InstallConfig.xml

For more details about OFSAAI\_InstallConfig.xml, refer to the *Oracle Financial Services Analytical Applications Infrastructure Installation and Configuration Guide*.

For more details about OFSPTA user interface workflows, refer to the *Oracle Financial Services Personal Trading Approval User Guide*.

## **Uninstalling OFSPTA**

To uninstall OFSPTA in a particular OFSAAI Layer, follow these steps:

**Note:** If you are using multi-tier architecture, The OFSPTA Uninstaller must be run on all servers hosting an OFSAAI Layer.

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

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

2. Navigate to \$FIC\_HOME/Uninstall\_PTA directory and execute the following command:

```
$ ./Uninstall_App.sh
```

3. Input the Configuration Schema Password when prompted.

4. After running Uninstaller on all the layers, do the following:

- Uninstall OFSAAI ear file deployed on Web Server
- Navigate to \$FIC\_HOME/ficweb on server hosting WEB Layer
- Execute the following command to recreate ear file.

```
$ ./ant.sh
```

- Deploy the new ear file on Web Server

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

**Important:** The OFSPTA Uninstaller does NOT revert the DataModel Upload done as part of OFSPTA Installation.

If you are performing re-installation of OFSPTA after running the un-installer, and want to keep same InfoDom and Segment Names for the atomic schema and tablespaces then replace the following parameter in GRC\_InstallConfig.xml with 0 before starting re-installation since all these items already exist in the database.

**##PRE\_INSTALL##**

This variable is used to identify whether installer will perform the Data Model Upload for the OFSPTA atomic schema.

## Upgrading OFSECM Analytics Reports

This section discusses about following topics:

- Pre-Requisite
- First Approach
- Second Approach
- Unarchiving the PTA Catalog

You can upgrade OFSECM Analytics Reports in following two approaches:

- First Approach
- Second Approach

### Pre-Requisite

For FCCM 6.2, the OBIEE server version must be upgraded to 11.1.1.7.0.

Connection pool for PTA should be configured. To configure refer section, Configuring OBIEE Connection Pool, section of *Installation Guide - Stage 3*.

#### Note:

1. Default password for the PTA repository is password123
2. Connection Pools for both ORCL and Authorization are Alert Management Schema details

### Important

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.

**Note:** The Oracle BI Administration Tool version 11.1.1.7.0 should be installed before performing these steps.

### First Approach

#### Step 1: Generating the Patch xml file

To generate the patch.xml file, follow these steps:

1. Open the DEV RPD (6.2 RPD) with the Admin tool while offline.
2. Go to **File -> Compare**.
3. Select 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 is saved.

## Step 2: Merging RPDs

To merge the xml file into a production RPD navigate to <Oracle BI Administration Tool Installed Path>\oraclebi\orahome\bifoundation\server\bin and execute the patchrpd command as shown 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.

## Second Approach

### Merging PTA RPD with FCCM 6.2.2 RPD

To merge PTA RPD with FCCM 6.2.2 RPD, follow these steps:

1. Open the Oracle BI Admin Tool while offline.



Figure 1. Oracle BI Admin Tool

2. Click **File**, select **New Repository**. The New Repository window is displayed.

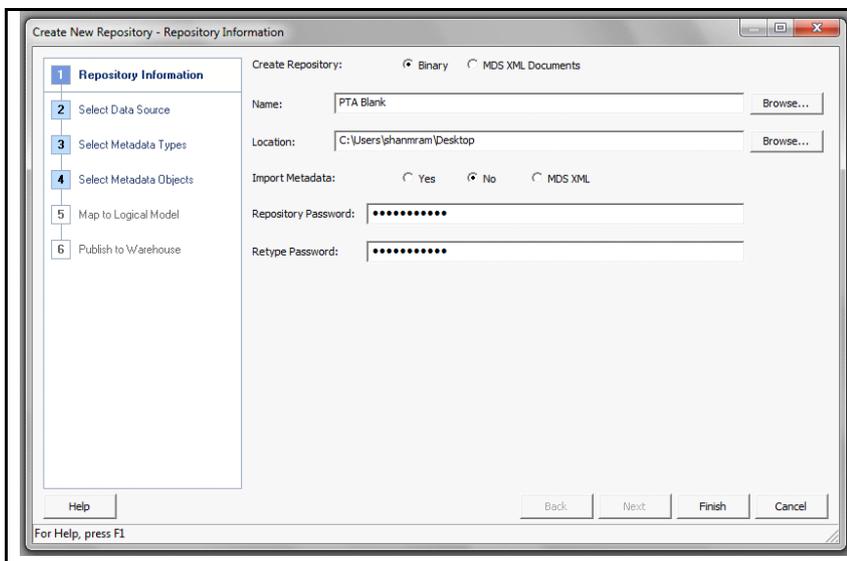
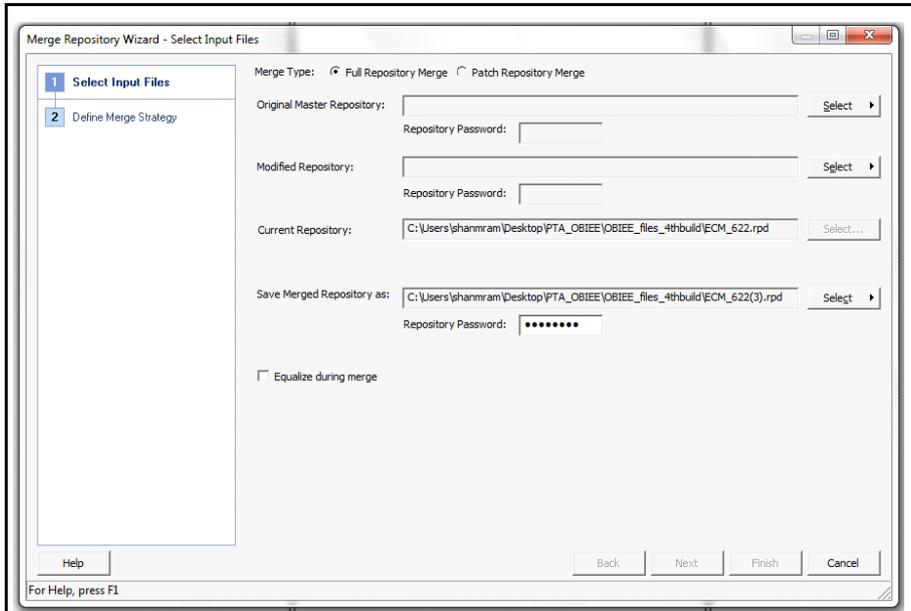


Figure 2. New Repository window

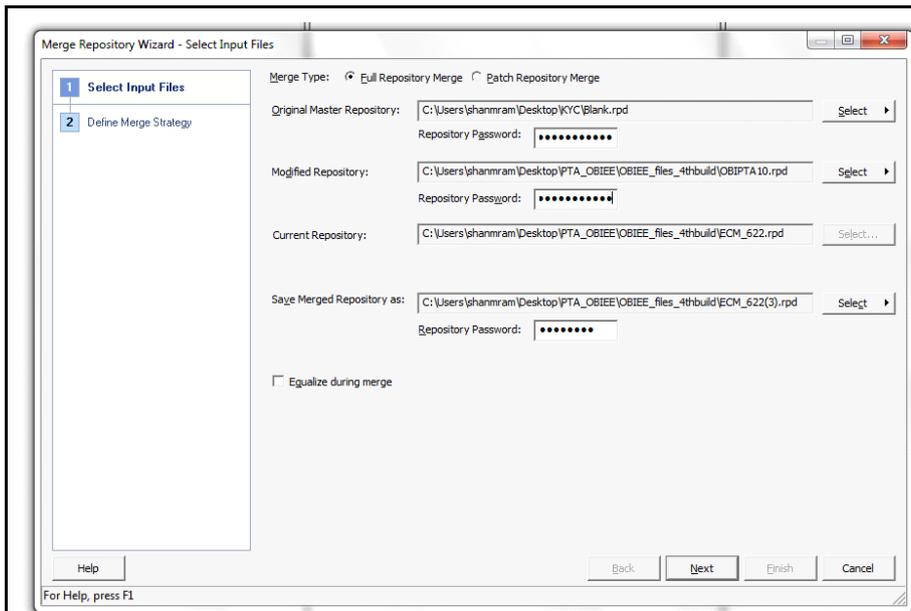
3. Enter Name, select the Location, and select No. Enter Repository Password as Admin123.
4. Click **Finish**.
5. Once again click **File**. Select Save.
6. Click **Yes** button and click **OK**.
7. Once again click **File**. Open 622 rpd in offline mode in which connection pools had been modified.

8. Click **File**, select **Merge**.



**Figure 3. Merge Repository window**

9. Click **Select**, select Repository against the Original Master Repository as Blank Repository and Enter password that has been entered in step 3.
10. Select the Modified repository as PTA rpd and enter password.



**Figure 4. Merge Repository window**

11. Click **Next** button.

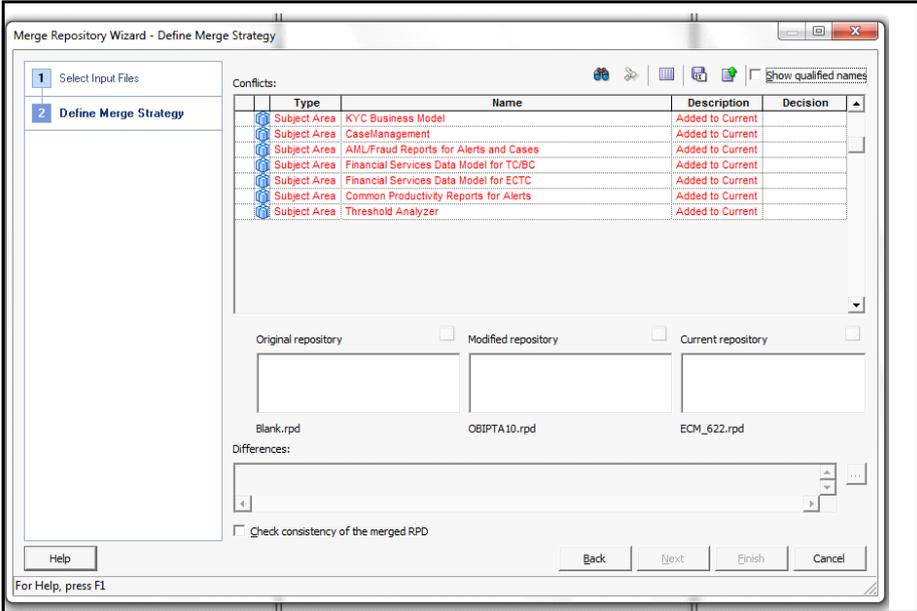


Figure 5. Merge Repository window

12. Select Decision drop down and choose Current for all the listed Subject Area

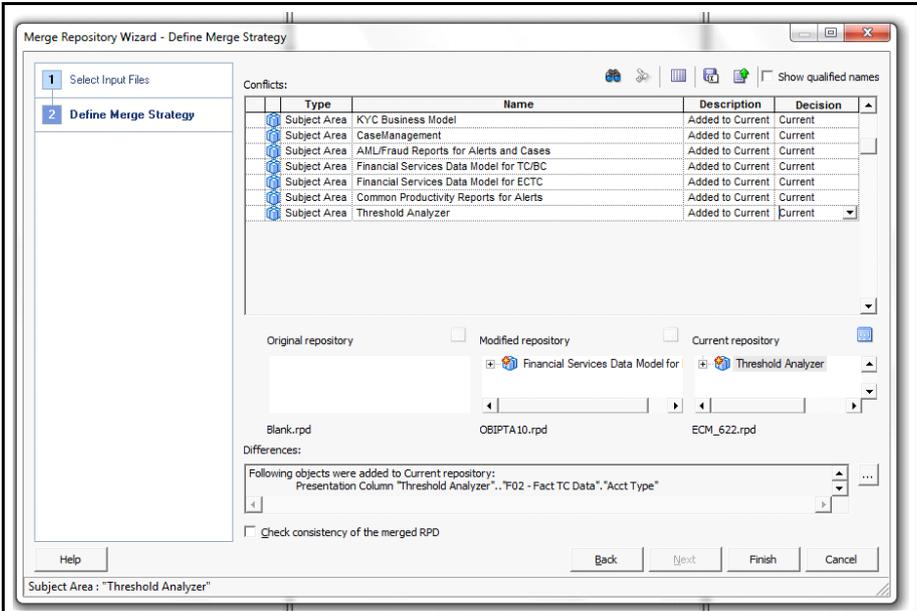


Figure 6. Merge Repository window

13. Click Finish.

## **Unarchiving the PTA Catalog**

To unarchive PTA catalog, follow these steps:

1. Login to OBIEE analytics URL as Administrator user
2. Click Catalog.
3. From LHS, Click on shared folder.
4. Under task, click on Unarchive.
5. Select PTA.Catalog from destination folder.
6. Click OK button.



