

Product Installation Manual  
Oracle Financial Services Institutional Performance  
Analytics  
Version 6.0  
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## Document Control

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## **About this Manual**

The Oracle Financial Services Institutional Performance Analytics provides strategic insights on - Profitability of the business and the underlying customers, Product holdings and Relationship depth across the organization (i.e. Corporate client and any of its sub-divisions or subsidiaries), Behavioral and Engagement trends of its target segments – exposures, commitments, line utilization, assets/liabilities, deposits, withdrawals, Fees, Income, recent transactions etc, Efficiency of investments (like marketing, partner development), Efficiency of the sales force in terms of ongoing customer revenue generation, cross-sell and up-sell, product usage and pipeline.

### **Audience**

This Manual is meant for use by the Oracle Financial Services Analytical Applications Infrastructure System Administrator. It provides step-by-step instructions necessary for installing the Oracle Financial Services Institutional Performance Analytics v6.0 Product.

### **Scope**

This manual provides a step-wise instruction to install the Oracle Financial Services Institutional Performance Analytics Product in an existing Oracle Financial Services Analytical Applications Infrastructure hosted in Oracle 11g R2 (11.2.0.2.0) environment.

### **Organization of the Manual**

The Installation Manual is organized into the following chapters.

**Pre Requisites** section identifies the hardware and base software environment that is required for a successful installation & functioning of the Oracle Financial Services Analytical Applications Infrastructure Solution.

**Installing Oracle Financial Services Institutional Performance Analytics v6.0 Product** section details the pre-installation activities followed by a step-by-step instruction on the various installation options.

**Post installation Activities** section details the steps that are required to be performed after a successful installation of the Oracle Financial Services Analytical Applications Infrastructure Solution.

### **Conventions Used in this Manual**

References to sections or chapters in the manual are displayed in *Italics*.

Screen names are displayed in the following manner:

**Introduction** screen

Options and buttons are displayed in **Bold**.

Notes are displayed as follows:

#### **NOTE**

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

## **Pre-Requisites**

The installation process requires certain environmental variables to be set prior to starting the installation. You must ensure that these requirements are met before starting the installation. You are requested to refer to the Release Notes for the latest updates on hardware or software requirements and the OFSAAI Installation Manual for the environment variables.

### **Environment**

Installation of Oracle Financial Services Institutional Performance Analytics v6.0 Product requires the Oracle 11g R2 (11.2.0.2.0) version of **Oracle Financial Services Analytical Applications Infrastructure v7.3**, to be installed in either a single-tier or multi-tier environment. It is implicit that all base software versions and patch levels required by the RHEL/OEL-5.3/5.5 version of Oracle Financial Services Analytical Applications Infrastructure 7.3 is available and adhered to.

### **NOTE**

- If you are doing an up-gradation please make sure that OFSAAI has been upgraded from v7.2 (Release no – 7.2.10) to v7.3.
- The Oracle Financial Services Institutional Performance Analytics v6.0 installer download contains only the ERwin XML file that is required for uploading the model. This file is sufficient to install the v6.0 product. However, this XML file cannot be opened in the ERwin Data modeler tool and hence cannot be used for any data model customization. ERwin file is delivered as a patch and need to be downloaded separately. This ERwin file should be used for any customization of the data model. Reference bug / patch where ERwin file can be downloaded is Bug - 14354568

The Oracle 11g R2 (11.2.0.2.0) version of Oracle Financial Services Analytical Applications Infrastructure v7.3 and OBIEE 11.1.1.6.0 on any supported operating system once installed must be configured.

After Installation of OBIEE 11.1.1.6.0, following 3 patches are highly recommended for all the customers who are using Oracle Business Intelligence Enterprise Edition 11.1.1.6.0 which can be downloaded from Oracle support site.

- 13742915
- 13388423
- 14003822

### **Front-End Access**

- Internet Explorer 8.0/9.0
- Java Plug-in 1.6.0\_21
- Acrobat Reader 8.0

- The screen resolutions supported are 1024\*768 and 1280\*1024

**NOTE**

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

# **Installing Oracle Financial Services Institutional Performance Analytics v6.0 Product**

## **Pre-Installation Activities**

**The following is the Pre Installation checklist to ensure the readiness to start installing Oracle Financial Services Institutional Performance Analytics Product:**

- Oracle Financial Services Analytical Applications Infrastructure v7.3 must be successfully installed on Oracle 11gR2 (RAC) (11.2.0.2.0).
- If Infrastructure installation is on multitier environment, Execute the following commands in the DB Layer terminal
  - `chmod -R 777 < ftpshare folder >`
- Navigate to ftpshare folder and set the *umask* shown as below, this will make sure all the new files created will have 666 file permission.
  - `cd < ftpshare folder >`
  - `umask 0000`
- The Config and application schema should be two distinct oracle database users.
- Please execute the following grants in config schema. Please replace <ORACLE\_USER> with application schema user.
  - `grant select on METADATA_MASTER to <ORACLE_USER>`
  - `grant select on METADATA_ELEMENT_MASTER to <ORACLE_USER>`
  - `grant select on METADATA_LOCALE_MASTER to <ORACLE_USER>`
- Oracle database User for Application schema should have the below grants
  - `grant create session to <ORACLE_USER>;`
  - `grant create ANY INDEX to <ORACLE_USER>;`
  - `grant create PROCEDURE to <ORACLE_USER>;`
  - `grant create SEQUENCE to <ORACLE_USER>;`
  - `grant DEBUG CONNECT SESSION to <ORACLE_USER>;`
  - `grant create TABLE to <ORACLE_USER>;`
  - `grant create VIEW to <ORACLE_USER>;`
  - `grant create trigger to <ORACLE_USER>;`
  - `grant create type to <oracle_user>;`
  - `grant select on sys.v_$parameter TO <oracle_user>;`
- Please copy the entire Oracle Financial Services Institutional Performance Analytics v6.0 installer download directory to the server location (Including the DataModel directory). Please give read, write and execute permission to all the files present in this directory.
- Please specify the log file path and name in the log4j.xml. Please update the “value” attribute marked in the following picture

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

Figure 1: Log4j.xml file configuration

- Please make sure the path given in the log4j.xml file has read/write/execute permission.
- Please execute the "config\_table\_privileges\_for\_application\_user.sql" script in configuration schema. This file will be present inside \$FIC\_HOME directory.
- Please make sure FICServer is up and running before proceeding for installation.

# **Oracle Financial Services Institutional Performance Analytics v6.0 Product Installation**

The Oracle Financial Services Analytical Applications Infrastructure Product comprises of components that are installed in Web, Application & Database layer. Hence if you have installed Oracle Financial Services Analytical Applications Infrastructure 7.3 in a multi-tier architecture, the Oracle Financial Services Institutional Performance Analytics Product installer must be invoked on each of the machines that host the Oracle Financial Services Analytical Applications Infrastructure tier.

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

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

## **NOTE**

- This section holds applicable if Oracle Financial Services Analytical Applications Infrastructure v7.3 is installed on Oracle 11g on separate machines A and B respectively.
- Refer to section on “Silent Installation”, if a silent installation is required.

## Machine A – Product App Layer

### Step 1

To begin Oracle Financial Services Institutional Performance Analytics product installation, execute Setup.sh.

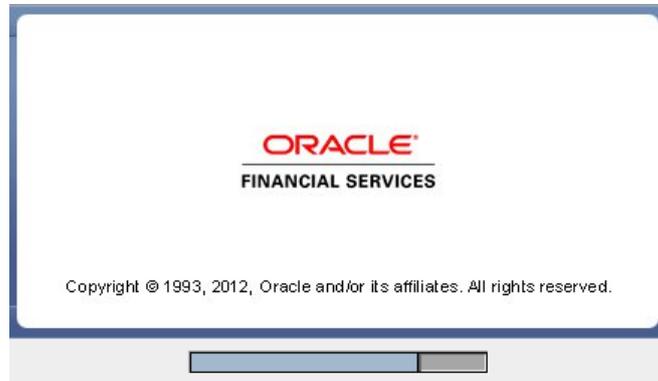


Figure 2: Installation Splash Screen

### Step 2

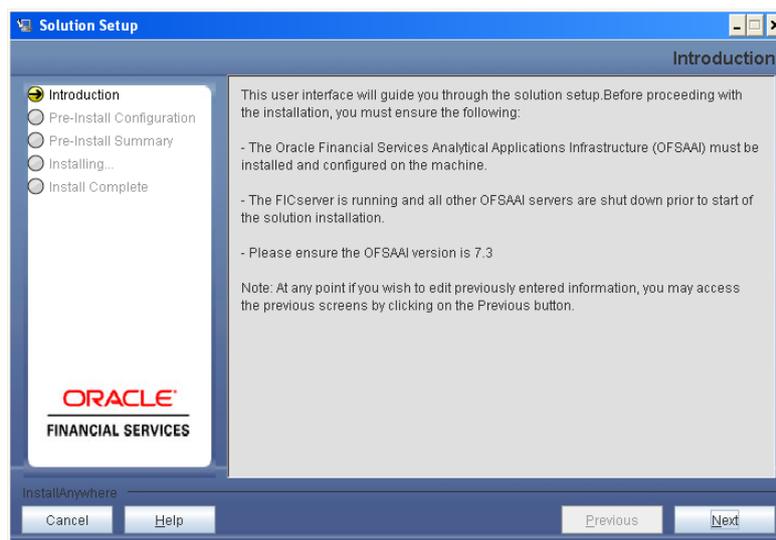


Figure 3: Introduction Screen

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

### Step 3

Please choose the log mode for this installer.

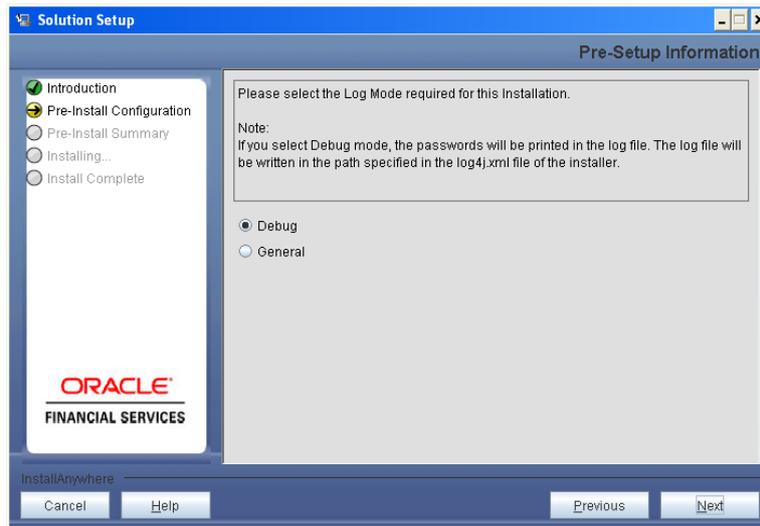


Figure 4: Log Mode Option Screen

#### Step 4

Please provide the 9 digit Customer Identification number provided during the OFSAAI installation.

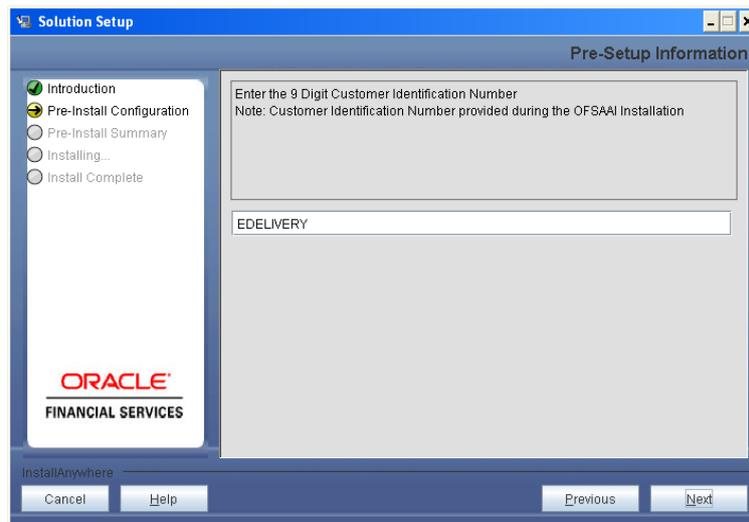


Figure 5: Customer ID Input Screen

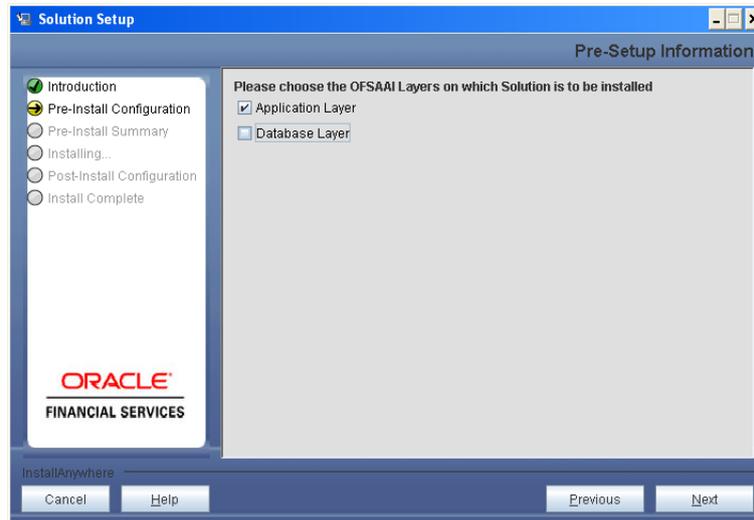
Click **Next** to continue.

## Step 5

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

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

Example **AppLayer**



**Figure 6: Pre Setup Information Screen – Choose Layer to Install**

Along with appropriate Oracle Financial Services Analytical Applications Infrastructure layer.

### NOTE

- For a single-tier Oracle Financial Services Analytical Applications Infrastructure v7.3 installation, you must select App Layer and DB Layer. For a multi-tier Oracle Financial Services Analytical Applications Infrastructure v7.3 installation, select the corresponding layer installed on the machine.

## Step 6

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

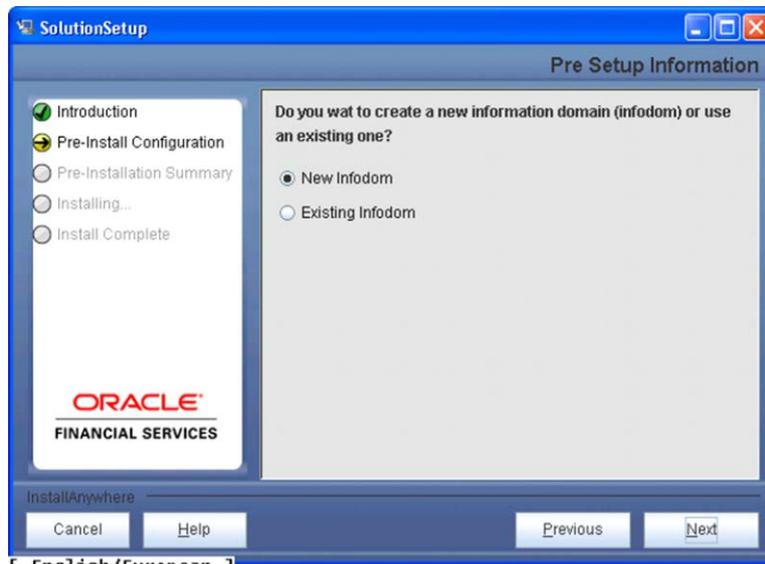


Figure 7: Pre Setup Information Screen – Infodomain type

Click **Next** to continue.

## Step 7-i

If the option “New Infodomain” was chosen in the previous panel then the following panel will be next displayed which will seek information of the following details to create infodomain.

Please specify a DB name for the new infodomain. Please make a TNS entry with the DB name specified in the tnsname.ora file in the oracle server.

Please enter the newly created application schema user name, password, jdbc url in relevant fields.

Click **Next** to continue

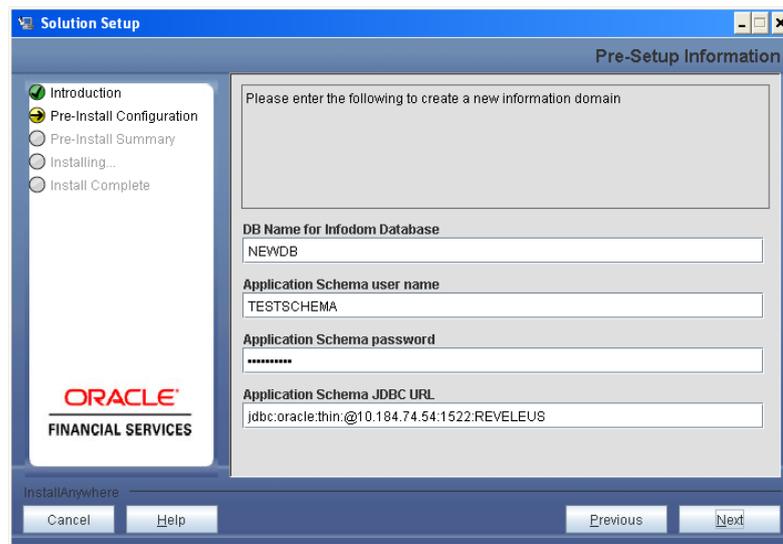


Figure 8: Database details for the new Infodomain

### Step 7-ii

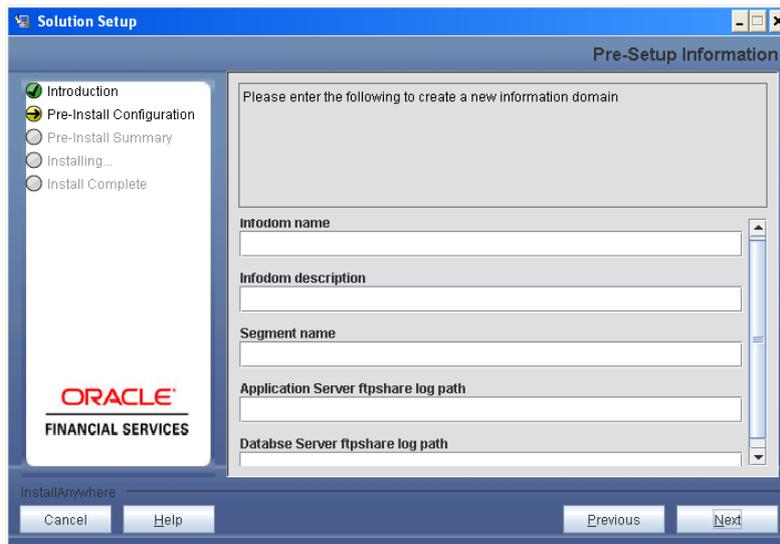
If the option “New Infodom” was chosen in the previous panel then the following panel will be displayed following the panel 7-i which will seek further information of the following details to create infodom.

Please specify the name and description for the new infodom to be created.

Please specify a segment name to be created.

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

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



**Figure 9: Infodom details for creation of new Infodom**

### NOTE

- The Oracle Financial Services Analytical Applications Infrastructure user must have a role that is able to perform Add/Modify functions for Oracle Financial Services Institutional Performance Analytics metadata.

Click **Next** to continue.

### Step 7-iii

If the option “New Infodom” was chosen in the previous panel then the following panel will be displayed following the panel 7-ii which will display the pre-infodom creation details. Please check and verify all the details before proceeding to the next step.

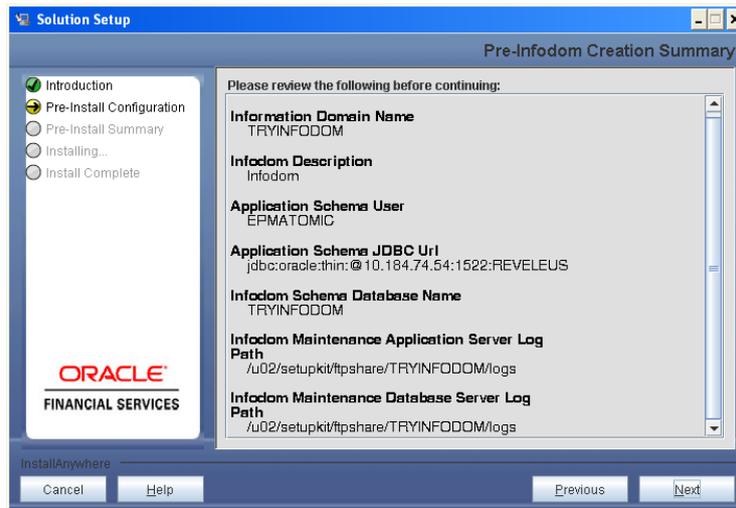


Figure 10: Pre Infodom Creation Summary

Click **Next** to continue creation of information domain. A new information domain will be created on clicking Next.

#### Step 7-iv

If the option “Existing Infodom” was chosen in the Step 6 then the following panel will be displayed which will prompt to select the infodom from list of infodoms present in the setup, enter segment code and enter the application schema’s TNS name.

Segment code should not exceed 10 characters

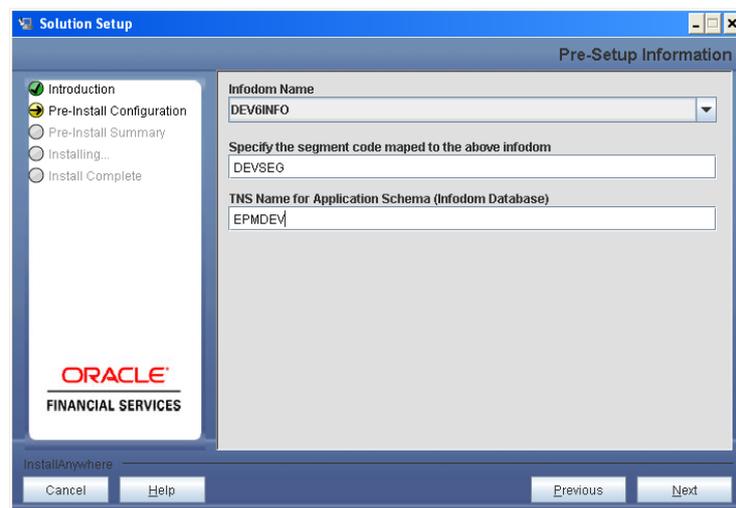
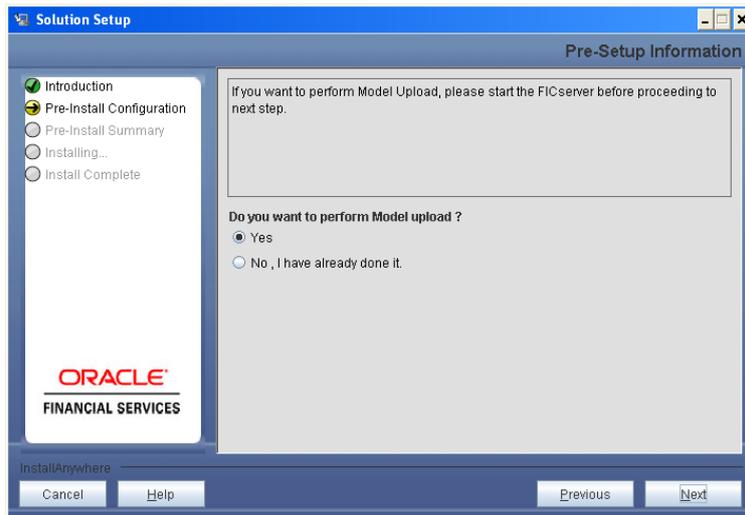


Figure 11: Installation in Progress

#### Step 8

CRMCA v6.0 data model is packaged as part of Oracle Financial Services Institutional Performance Analytics v6.0 product installer and will be installed as part of the upcoming steps, if required.

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



**Figure 12: Pre-Setup Information**

Clicking 'No' implies that Oracle Financial Services Institutional Performance Analytics v6.0 model has been uploaded into information domain prior to this installation.

Clicking 'Yes' will proceed with the Oracle Financial Services Institutional Performance Analytics v6.0 model upload process as part of the installation.

If the user selects "Yes", Step 9 and 10 will be performed.

Upon selecting "No.", Step 9 to 10 will be skipped.

Click **Next** to proceed.

### **Step – 9**

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

On selecting 'Released Data Model' option, installer uploads the Oracle Financial Services Institutional Performance Analytics v6.0 data model that is packaged as part of the Oracle Financial Services Institutional Performance Analytics v6.0 product.

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

Click **Next** to proceed.

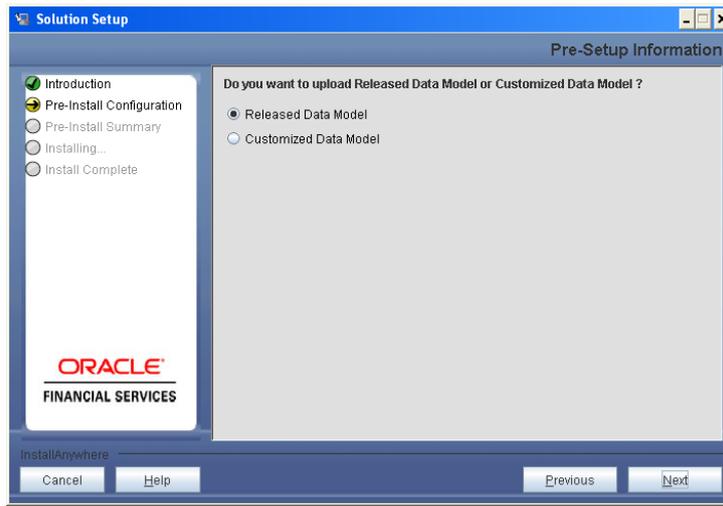


Figure 13: Pre – Setup information

### Step – 10

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

Please choose the customised datamodel file from the server.

#### Note:

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

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

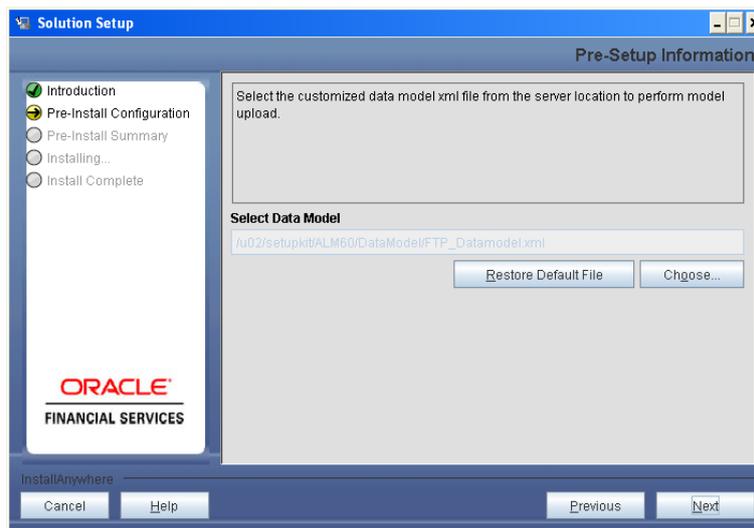


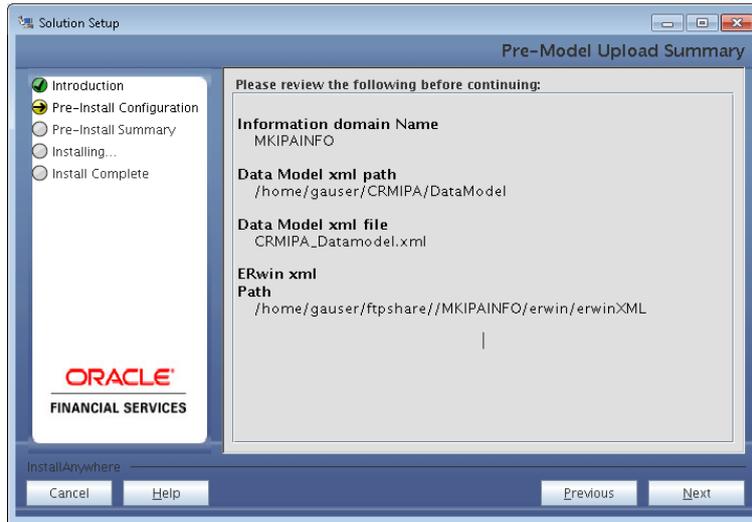
Figure 14: Pre – Setup information

### Step – 11

The following panel displays pre-model upload details.

Please verify the details before proceeding to the next step.

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



**Figure 15: Pre – Model Upload Summary**

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

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

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

**Note:**

Some of the common errors during model upload are

- Insufficient heap memory on the client machine
- Possible reason/resolution: The java memory settings in “reveusstartup.sh” located in \$FIC\_APP\_HOME/common/FICServer/bin directory should be increased.
- Error while getting the Erwin File path
- Possible reason/resolution: Restart the FICServer.
- Error in Upload Operation :
- “FAILED WHILE SUPER CATEGORY - SUB CATEGORY RELATIONS HANDLING DELETING”
- Possible reason/resolution: Incorrect Erwin.xml file version in \$FIC\_APP\_HOME/common/FICServer/conf directory.

- Incremental/Sliced model upload might give errors in case there are NOT NULL columns that are being added to a table that already has rows or if the columns that are being dropped have values. Check the data model changes excel file for any such cases. In such a case, take a backup of the table and truncate the table. Insert records back into the table with a default value for the NOT NULL column.

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

## Step – 12

The following panel seeks input from the user on whether to create new ETL application/source pair or use an existing one.

In case of upgrade, if customer selects an existing application/source pair, then existing ETL definitions under the source will be over-written with the packaged definitions. Customer can also choose to create a new application / source pair and then merge the changes between the packaged definition and their existing definitions offline.

Please choose a desired option.

Click **Next** to continue

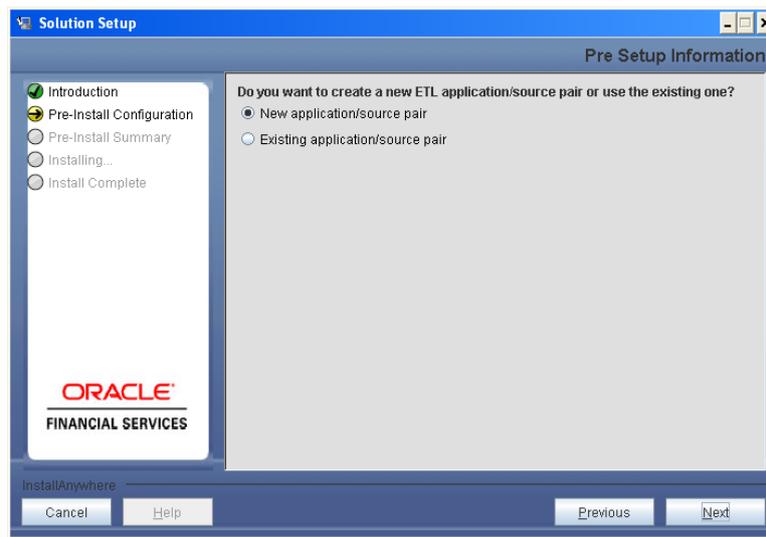


Figure 16: Pre – Setup Information

## Step 13-i

If the option "New application/source pair" was chosen then the following panel will be displayed seeking the application and source name for creation of the same.

Please specify all the details required for application and source creation.

Click **Next** to proceed.

Clicking 'Next' will create application and source within OFSAAI. Source model will also be generated. This process will take some time depending on the number of entities / attributes in the application schema. This step cannot be rolled back.

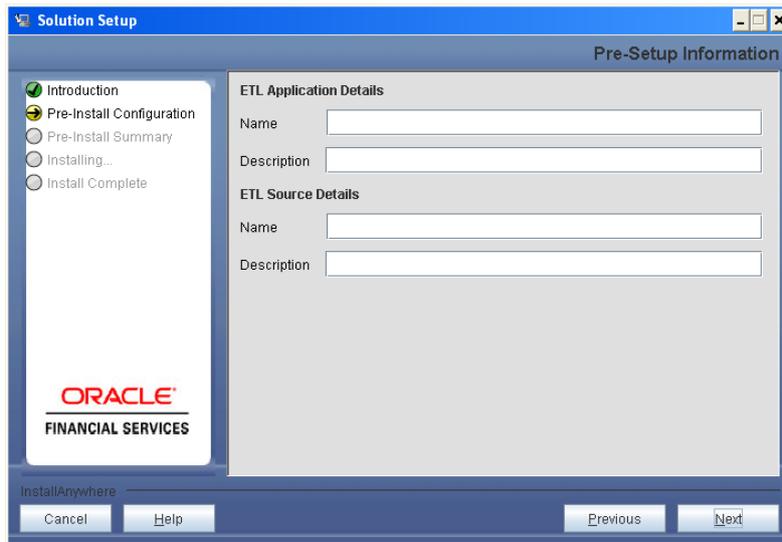


Figure 17: Pre – Setup Information

**Note:**

ETL Source will be created pointing to the information domain (application schema) that is specified during the installation.

**Step 13-ii**

If the option “Existing application/source pair” was chosen the following panel will be displayed prompting user to select app/source pair from the list of pairs already present.

Please choose the desired ETL application/source pair into which ETL definitions will be deployed.

Click **Next** to proceed

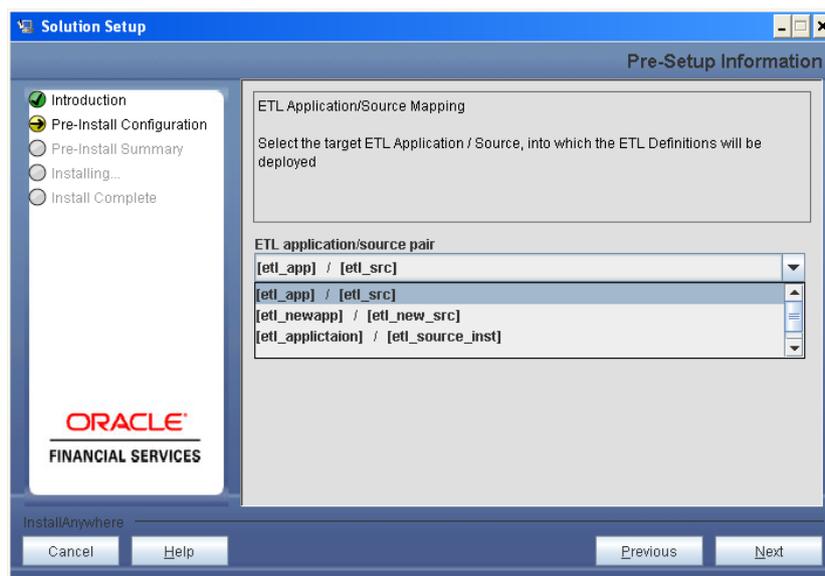


Figure 18: Pre – Setup Information

## Step 14

Please specify the OFSAAI user id.

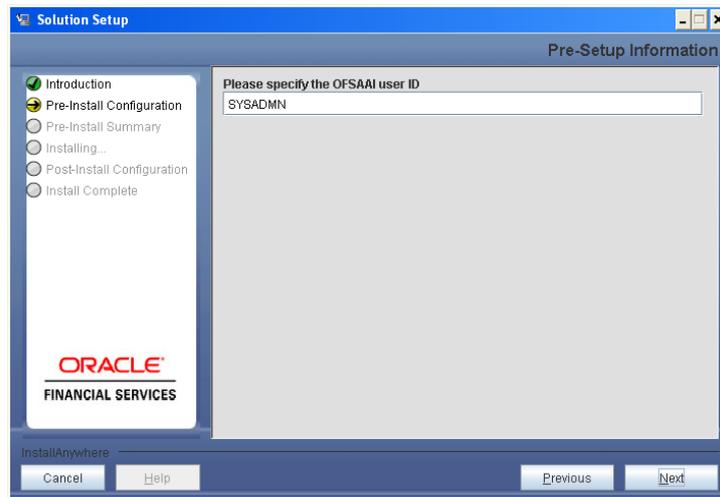


Figure 18: Pre Setup Information Screen

Click **Next** to continue.

## Step 15

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

Click **Install** to proceed.

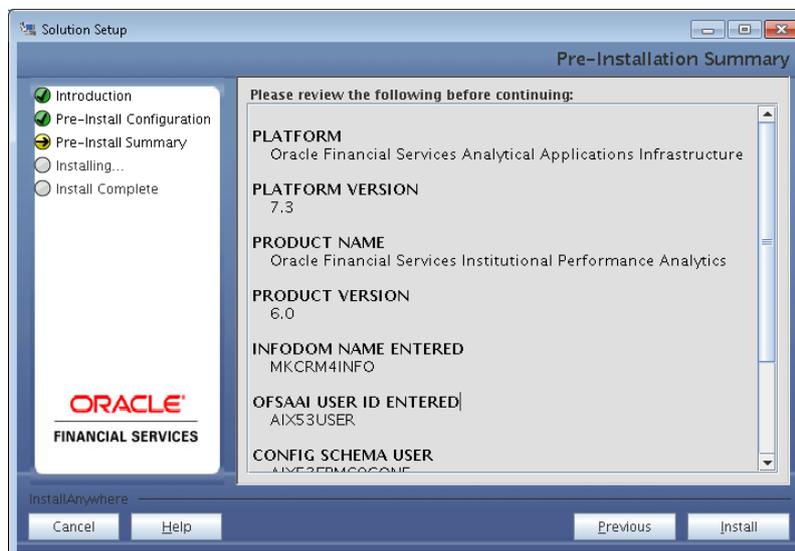


Figure 19: Pre – Install Summary

## Step 16

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

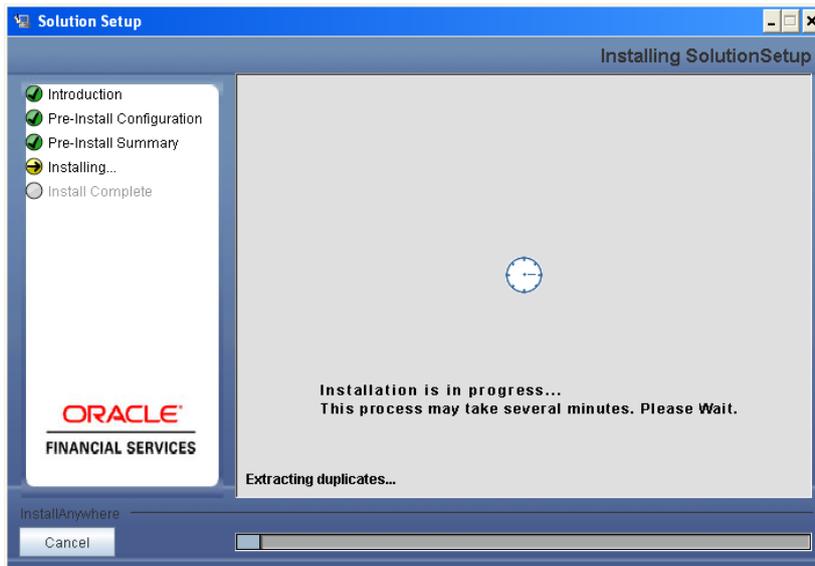


Figure 20: Installation is in progress

### Step 17

The following screen displays the completion of installation of the Oracle Financial Services Institutional Performance Analytics Product Setup.

Click **Done** to exit.

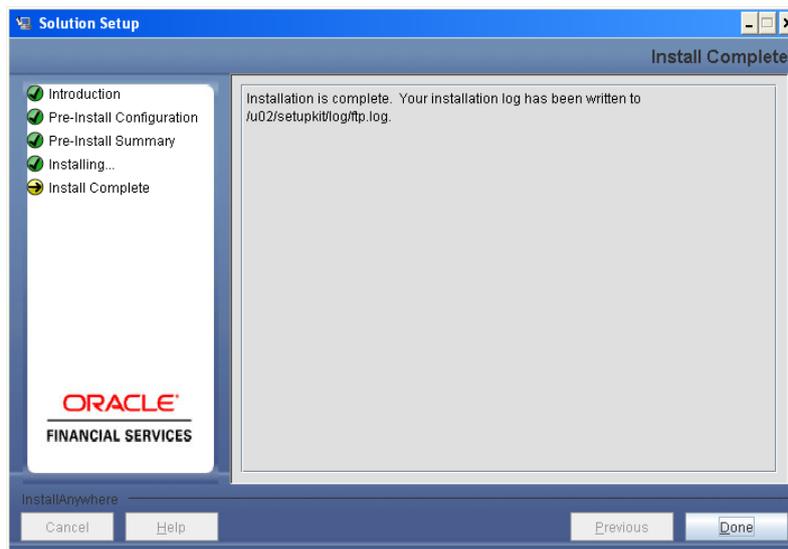


Figure 21: Installation Complete

## Machine B – Product Database Layer

### Step 1

To begin Oracle Financial Services Institutional Performance Analytics product installation, execute Setup.sh.

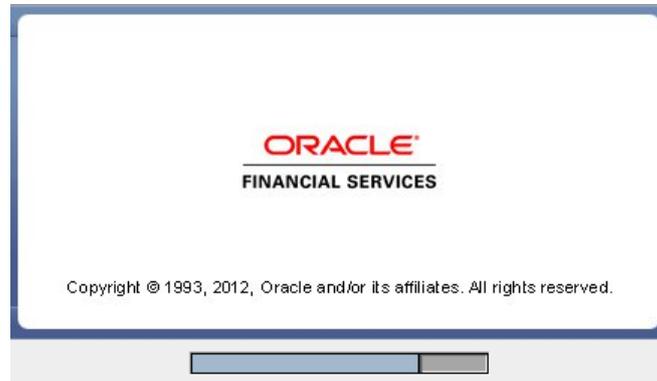


Figure 22: Installation Splash Screen

### Step 2

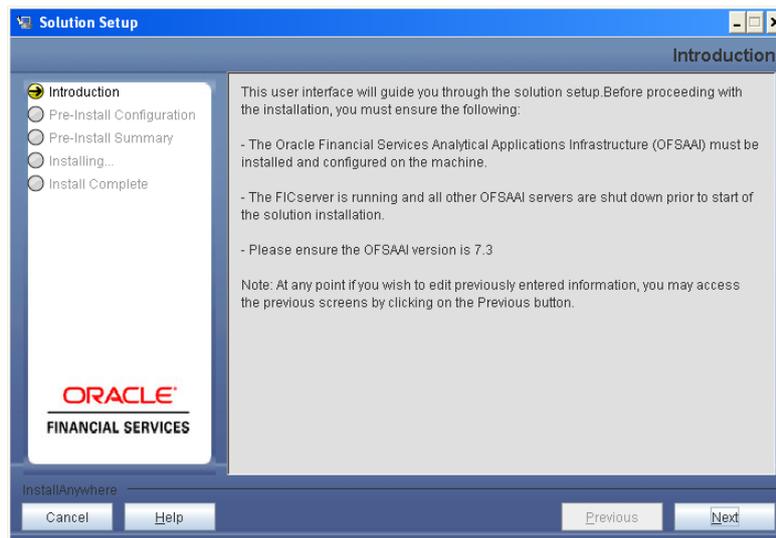


Figure 23: Introduction Screen

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

### Step 3

Please choose the log mode for this installer. Click **Next** to proceed.

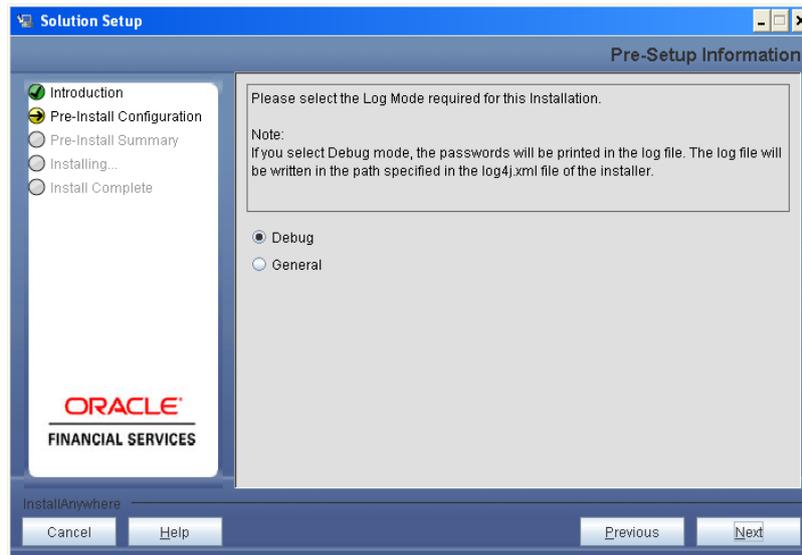


Figure 24: Log Mode Option Screen

#### Step 4

Please provide the 9 digit Customer Identification number provided during the OFSAAI installation.

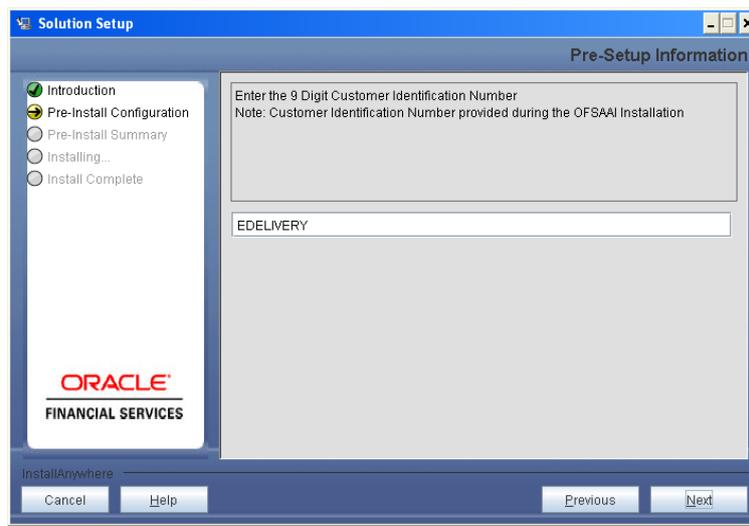


Figure 25: Customer ID Input Screen

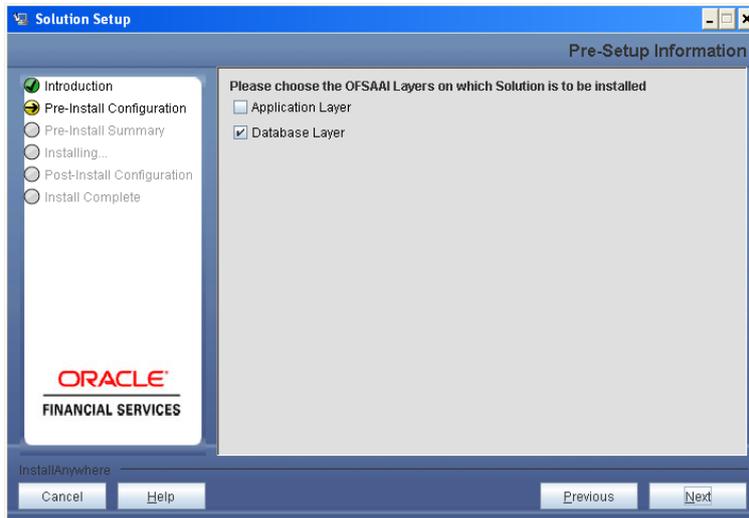
Click **Next** to continue.

## Step 5

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

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

Example **Database Layer**



**Figure 26: Pre Setup Information Screen – Choose Layer to Install**

Along with appropriate Oracle Financial Services Analytical Applications Infrastructure layer

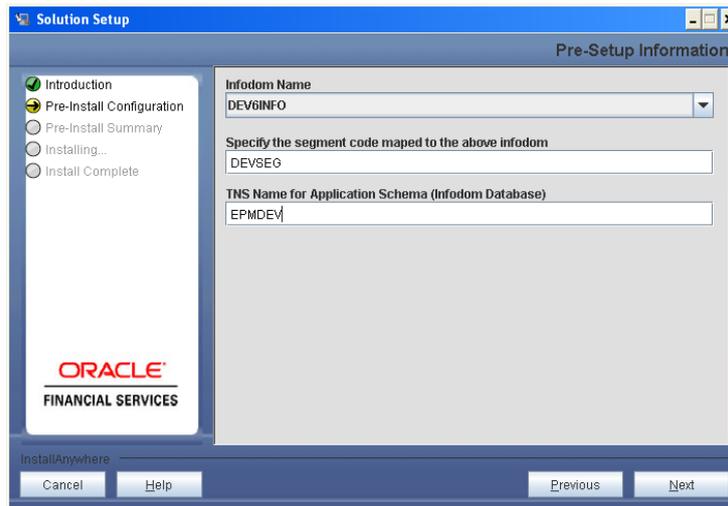
### NOTE

- For a single-tier Oracle Financial Services Analytical Applications Infrastructure v7.3 installation, you must select App Layer, DB Layer For a multi-tier Oracle Financial Services Analytical Applications Infrastructure v7.3 installation, select the corresponding layer installed on the machine.

## Step 6

The following panel will be displayed which will prompt to select the infodoms from list of infodoms present in the setup, enter segment code and enter the application schema's TNS name.

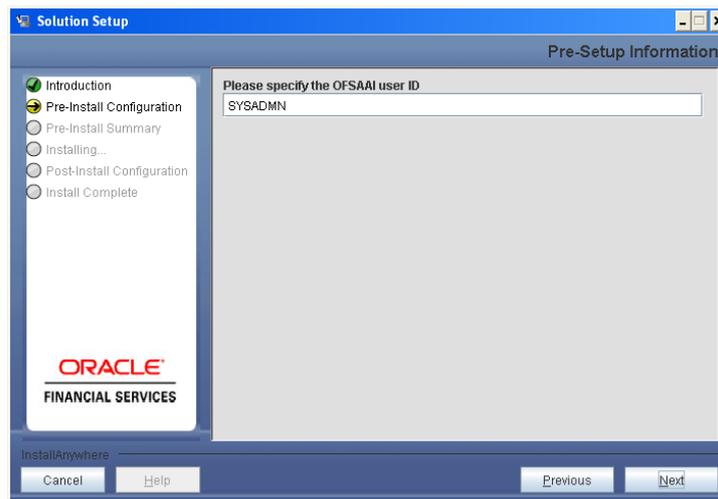
Segment code should not exceed 10 characters



**Figure 27: Pre Setup Information Screen**

**Step 7**

Please specify the OFSAAI user id.



**Figure 27: Pre Setup Information Screen**

Click **Next** to continue.

**Step 8**

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

Click **Install** to proceed.

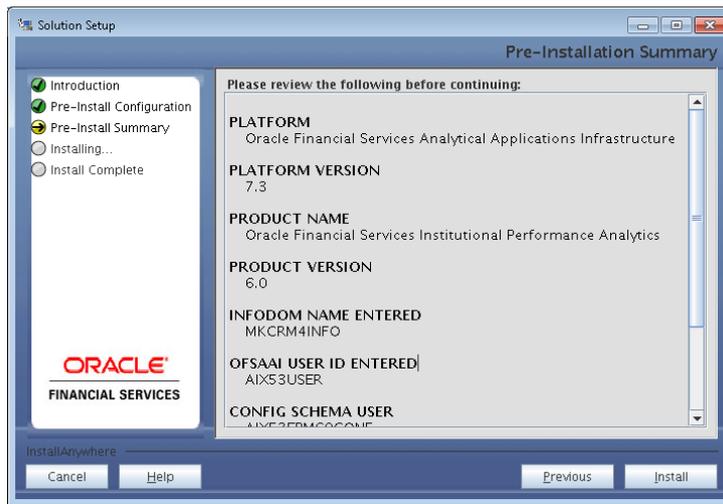


Figure 29: Pre – Install Summary

### Step 9

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

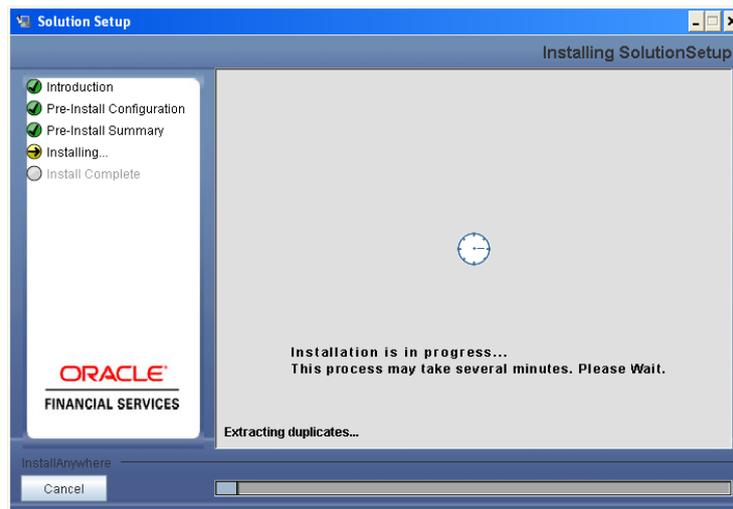
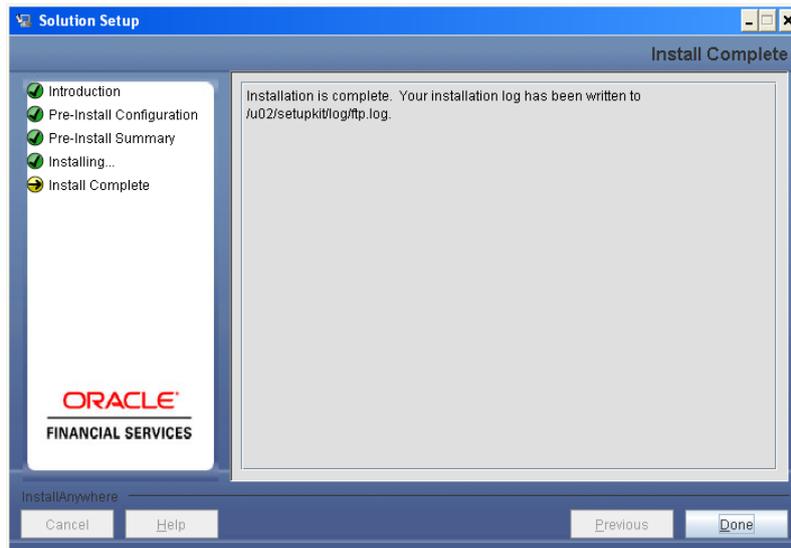


Figure 30: Installation is in progress

### Step 10

The following screen displays the completion of installation of the Oracle Financial Services Institutional Performance Analytics Product Setup.

Click **Done** to exit.



**Figure 31: Installation Complete**

## **Silent Installation**

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

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

### **How to install in Silent Mode**

- The installer folder contains a template file "Silent.template"
- Create a copy of this file and rename the copy as "Silent.props"
- Edit the file "Silent.props" and specify the parameters as per the requirements
- On the UNIX Command prompt, execute the following command
  - o "Setup.sh SILENT"

Refer to the console log [or the file preinstall.log] for any error messages.

Property Name	Description of Property	Permissible values	Comments
LOG_MODE	Mode for logging	0 = Debug 1 = General	Optional; Default : 0
CUSTOMER_ID	Customer id specified while installing OFSAAI	Not Applicable	MANDATORY
INSTALL_DB	Install database-tier components	0 = No 1 = Yes	Default : 0
INSTALL_APP	Install Application-tier components be installed	0 = No 1 = Yes	Default : 0
INFODOM_NAME	Information Domain(infodom)	Not Applicable	MANDATORY
SEGMENT_CODE	Segment Code	Not Applicable	MANDATORY Segment Code should not exceed 10 characters
TABLESPACE	Tablespace name	Not Applicable	MANDATORY
INFODOM_TYPE	New Infodom or Existing Infodom	0 = New 1 = Existing	# Specify Infodom Type Mandatory if this an App Layer Installation and option selected for INSTALL_APP=1
APPL_TNS	TNS Name of the Infodom database	Not Applicable	MANDATORY
APPL_USER	User-id of the Database Schema for new Infodom	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0
APPL_PWD	Password of the Database Schema for new Infodom	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for

			INSTALL_APP=1 and INFODOM_TYPE=0
APPL_URL	JDBC Connection String of the the Database Schema for new Infodom	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0
RAC_STATUS	whether the Database Schema for new Infodom is a RAC database	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0
INFODOM_DESC	Description for the Database Schema for new Infodom	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0
APALM P_LOG_PATH=	Infodom Maintenance log path(to be created) for the new Infodom for applayer	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0
DBFTP_LOG_PATH	Infodom Maintenance log path(to be created) for the new Infodom for DBLayer	Not Applicable	# Mandatory if this an App Layer Installation and want to create a new infodom  # Option selected for INSTALL_APP=1 and INFODOM_TYPE=0
UPLOAD_MODEL	whether you want to perform Model Upload	0 = No 1 = yes	Mandatory if INSTALL_APP=1

MODEL_TYPE	Released datamodel or Customized datamodel	0 = released 1 = customized	Mandatory if INSTALL_APP=1
DATAMODEL	the path for the customized datamodel	Not Applicable	# Mandatory only in the case of uploading the customized datamodel # Option selected for MODEL_TYPE=1
DM_DIRECTORY	the file name for the customized datamodel	Not Applicable	# Mandatory only in the case of uploading the customized datamodel # Option selected for MODEL_TYPE=1
ETL_APP_NAME	The ETL application name	Not Applicable	# Mandatory if this an App Layer installation # Option selected for INSTALL_APP=1
ETL_SRC_NAME	The ETL Source into which the Table-2-Table ETL definitions on staging tables will be deployed.	Not Applicable	This Source must be mapped to the above ETL Application
ETL_APPSRC_TYPE	Create new ETL App/Src pair or use an existing one	0 = New 1 = Existing	# Mandatory if this an App Layer installation # Option selected for INSTALL_APP=1 # 0 = If you want to create a new ETL app/src pair # 1 = If you want to use an existing pair
ETL_APP_DESC	Please give description for the ETL App	Not Applicable	# Mandatory if you want to create new ETL app/src pair # Option selected for ETL_APPSRC_TYPE=0
ETL_SRC_DESC	Please give description for the ETL Src	Not Applicable	# Mandatory if you want to create new ETL app/src pair # Option selected for ETL_APPSRC_TYPE=0

## **Post Installation Activities**

### Oracle Financial Services Analytical Applications Infrastructure Server Memory Configuration

The Oracle Financial Services Analytical Applications Infrastructure Application Server is started using `reveleusstartup.sh`. This file can be edited for setting customized memory settings, garbage collector settings depending on the available hardware configuration. Please raise an SR in [support.oracle.com](https://support.oracle.com) if you have any queries related to EPM applications.

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

- Check the Log file (The path and file name specified in the `log4j.xml`).
- Ignore the following errors in the log file:
  - Error: ORA-02260: table can have only one primary key.
  - Error: ORA-00955: name is already used by an existing object.
  - Error: ORA-00001: unique constraint (<<UNIQUE KEY NAME>>) violated.
  - Error: ORA-02275: such a referential constraint already exists in the table.
  - Error: ORA-01430: column being added already exists in table.
  - Error: ORA-02303: cannot drop or replace a type with type or table dependents.

# Oracle Financial Services Institutional Performance Analytics Configuration

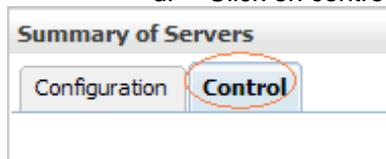
1. Make sure Oracle Business Intelligence (Version 11.1.1.6.0) installation is completed with patches (13742915,13388423,14003822) and available.
2. Set the <Oracle BI Instance Home> directory => e.g. /u01/OBIEE11G/instances/instance1.
3. Start Weblogic AdminServer.
  - a. Set the < BI Domain Home> directory => e.g. /u01/OBIEE11G/user\_projects/domains/bifoundation\_domain.
  - b. Navigate to < BI Domain Home >/bin and run 'nohup ./startWebLogic.sh &'
  - c. Bringing up this service may take a few minutes depending on your environment. Check the logs using the command 'tail -f nohup.out'
4. Start Node Manager.
  - a. Set the < WebLogic Server Home > directory => e.g. /u01/OBIEE11G/wlserver\_10.3.
  - b. Navigate to <WebLogic Server Home>/server/bin and run 'nohup ./startNodeManager.sh &'
5. Start Weblogic Managed Server(bi\_server1).
  - a. Login onto http://localhost:7001/console using your Administrator credentials created during platform install (Replace the hostname based on your setup).
  - b. Under Environment block (mid of page, towards left side), click on Servers link.



c. The bi\_server1 line should show as shutdown state at this point.

<input type="checkbox"/>	Server	Machine	State	Status of Last Action
<input type="checkbox"/>	AdminServer(admin)	laliv-lap	RUNNING	None
<input type="checkbox"/>	bi_server1	laliv-lap	SHUTDOWN	TASK COMPLETED

d. Click on control page tab.



- e. Select the bi\_server1 line by clicking on the left tick box,
- f. Click start button at the top of the list and confirm starting this service

**Servers (Filtered - More Columns Exist)**

Start Resume Suspend ▾ Shutdown ▾ Restart SSL

<input type="checkbox"/>	Server ↕	Machine	State
<input type="checkbox"/>	AdminServer(admin)	laliv-lap	RUNNING
<input checked="" type="checkbox"/>	bi_server1	laliv-lap	SHUTDOWN

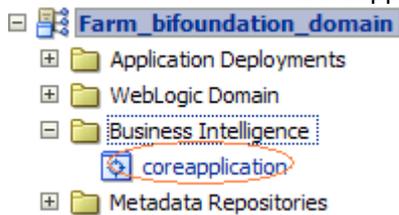
Start Resume Suspend ▾ Shutdown ▾ Restart SSL

g. State will update to "RUNNING" mode after a few minutes.

6. Start BIEE services and login

a. Starting services From EM screen

- i. Login to the EM administration screen using the url <http://localhost:7001/em> (Replace the hostname and port number based on your setup). Use the login you created in BIEE installation to log in.
- ii. Expand 'Business Intelligence' node on the left and choose Coreapplication.



iii. Click on the Overview Tab,

**Change Center:** | Lock and Edit Configuration

**Overview** | Capacity Management | Diagnostics | Security | Deployment

**System Shutdown & Startup**

100% Up (5)

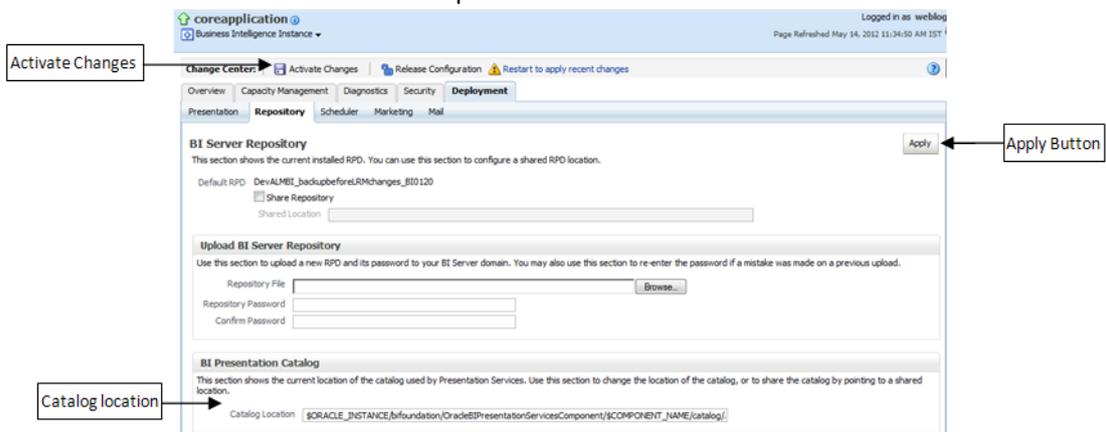
System Components

**System Status** | **Manage System**

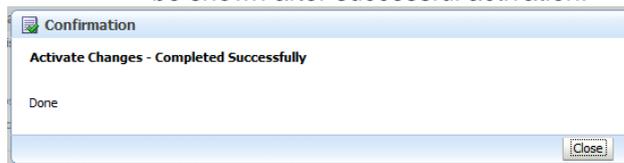
↑ All components are available

Start Stop Restart

- iv. Click on blue button 'Restart' (or green button 'Start' ) under the Manage System category, middle of screen,
  - v. Click yes on dialog box to confirm the move. Wait for message that confirms successful restart.
- b. If starting using EM is not successful and complaining about OPMNCTL not up, please follow starting process with OPMNCTL.
- i. Open a command prompt, navigate to <Oracle BI Instance Home>/bin.
  - ii. run `./opmnctl status`, this will show you status of all the OBIEE core services
  - iii. run `./opmnctl startall` or `./opmnctl stopall` depending on your need.
7. Deploy RPD and webcat file(s).
- a. Navigate to folder `$FIC_HOME/CRMIPA/RPD_WEBCATALOG/` which contains both CRMCA.rpd and archived CRMCA.catalog (contains the shared folder of CRMIPA application).Copy both the files to a local folder.
  - b. Login to
    - I. OBIEE – Enterprise Manager URL (<http://<ip address>:<port>/em>).
    - II. Click on hyperlink 'coreapplication' from 'Business Intelligence' tab on left hand side.
    - III. Under 'coreapplication', select the tab 'Deployment' and click 'Lock and Edit Configuration' button located below title 'coreapplication'. Following screen will show up.

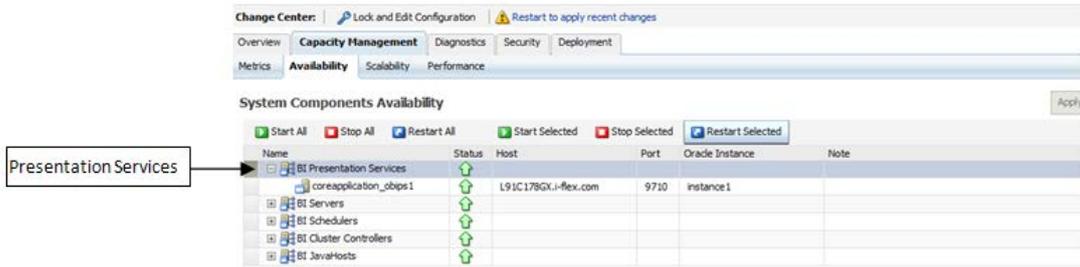


- IV. RPD Deployment:
  - 1. Select 'Browse' button available under 'Upload BI Server Repository' section and select CRMIPA.rpd file from the local folder. Enter Repository password 'Admini123'
- V. Web catalog Deployment:
  - 1. Set the Catalog Location available under 'BI Presentation Catalog' like:  
`"$ORACLE_INSTANCE/bifoundation/OracleBIPresentationServicesComponent/$COMPONENT_NAME/catalog/CRMIPA"`
  - 2. Now Click 'Apply' and then Click 'Activate changes'. A pop up will be shown after successful activation.

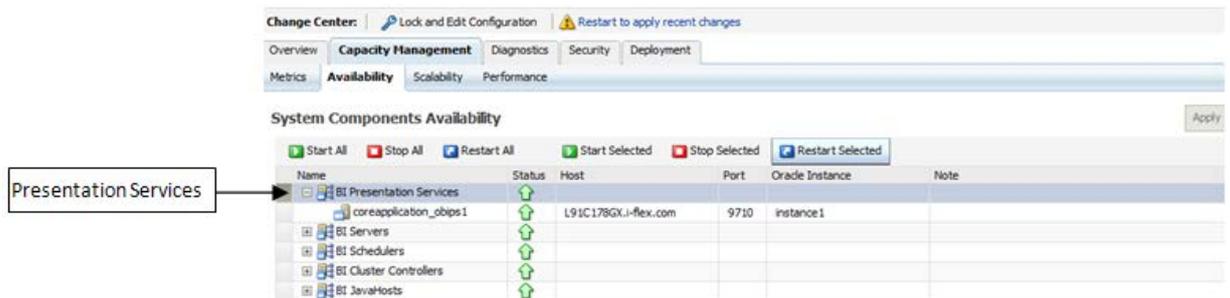


- 3. Click 'Close' and switch to 'Capacity management' tab.

4. Restart the presentation services. Under the 'System Components Availability', select 'Presentation Services' and click on 'Restart Selected' option.



- VI. Once the Presentation Service is restarted, it will give the pop up for successful restart. Click 'Close'
- VII. Verify that new folder structure is created in the system. It can be found under path :  
<Oracle BI Instance Home>  
\bifoundation\OracleBIPresentationServicesComponent\coreapplication\_obps1\catalog\CRMIPA
- VIII. This 'CRMCA' folder will be having a root folder which in turn contains three folders named 'shared', 'system' and 'users'.



- c. Open the Catalog Manager
    - a. Go to 'File' and open the catalog online (File->Open catalog) by giving the necessary credentials based on your setup (Type - (online), URL - (<http://<ipaddress>:<port>/analytics/saw.dll>)).
    - b. Once the catalog is opened, it will display a folder structure on left hand side. Select the shared folder under root folder in the LHS tree structure.
    - c. Go to 'File' menu and select 'Unarchive'. It will ask for the path for a file.
    - d. Browse the path of the archived catalog file saved in your local folder using the 'Browse' button in the pop up. Click 'Ok'
    - e. The catalog will be unarchived in specified location. A pop up for successful operation will be shown. Restart the presentation services once again.
  - d. Open the analytics OBIEE URL- (<http://<ipaddress>:<port>/analytics>) Login with credentials based on your setup, and verify that catalog is available.
8. Configure tnsnames.ora.
    - a. Open "tnsnames.ora" file under the folder - <Oracle Home>/network/admin
    - b. Make sure an entry is made in the tnsnames.ora to connect to application schema of OFSAA application.
    - c. Save the tnsnames.ora
  9. Configure ODBC data source to connect to Oracle BI Server.
    - a. Go To Control Panel>Administrative Tools>Data Sources (ODBC).
    - b. Select the 'System DSN' tab and click 'Add' Button.
    - c. Select a driver specific to (Oracle BI Server 11g) and click 'Finish' Button.

- d. Enter 'Name' and 'Server' details (Specify the Host Name or IP Address of the BI Server and click 'Next').
  - e. Enter Oracle BI Server login id and password (Enter User Name and Password created at the time of OBIEE installation). Click 'Next'.
  - f. Click 'Finish'.
10. Modify connection pool and set the properties.
- a. Open the OBI Administration tool.
  - b. Select Start > Programs > Oracle Business Intelligence > BI Administration.
  - c. Select File > Open > Online and select 'CRMCA.rpd' file.
  - d. In the Open dialog box, select and open 'CRMCA.rpd' file.
  - e. Enter Repository password as 'Administrator'.
  - f. In the "Physical" layer, double-click the CRM Connection Pool under CRM Database to open its properties.
  - g. In the 'General' tab, edit / check the following entries:
  - h. Call Interface: (OCI 10g/11g).
  - i. Data source name: <tnsnames.ora entry created in the step 8.b connecting to OFSAA application schema>.
  - j. User name: <enter application db user name>.
  - k. Password: <enter application db user password>.
  - l. Confirm password and Click 'OK' to close the window.
  - m. Repeat the same for CRM Connection Pool (Init Block)
  - n. In the "Physical" layer, double-click the CRM Connection Pool under CRM Essbase " to open its properties.
  - o. Essbase Server :< ip address/Hostname of the Essbase server>Username : <Essbase username>
  - p. Password : <Essbase password>
  - q. Confirm password and Click 'OK' to close the window and click 'Save' to save the RPD file.
  - r. Click 'No' for the Global Consistency Message.
  - s. Close the RPD file (File / Exit).
11. Login into CRMIPA Application using the URL:  
<http://localhost:9704/analytics>.(Replace the port number based on your setup).

## **Trouble shooting**

Problem: After logging into CRMIPA Application, if end user experiences an error as “*Exceeded configured maximum number of allowed output prompts, sections, rows, or columns*” while accessing reports.

Solution:

1. Bring down OBIEE Presentation services.
2. Locate and take a back up of the file 'Instanceconfig.xml' in following folder structure  
<Oracle BI Instance  
Home>\config\OracleBIPresentationServicesComponent\coreapplication\_obips1
3. Edit the file. Locate the tab '<view>' which in turn contains '<pivot>' tab in instanceconfig.xml.
4. Paste the following lines in between '<pivot>' and '</pivot>' tab.  
<MaxVisibleColumns>3000</MaxVisibleColumns>  
<MaxVisiblePages>10000</MaxVisiblePages>  
<MaxVisibleRows>50000</MaxVisibleRows>  
<MaxVisibleSections>250</MaxVisibleSections>  
<DefaultRowsDisplayed>30</DefaultRowsDisplayed>
5. Save the file and restart the presentation services.

## **OBIEE Installation and Configuration Guide Link**

Note: Refer the following link to down load the OBIEE installation and configuration guide document.

[http://www.oracle.com/technology/documentation/bi\\_ee.html](http://www.oracle.com/technology/documentation/bi_ee.html)



Installation Manual

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Oracle Financial Services Institutional Performance Analytics v6.0 Product

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