



An Oracle Technical White Paper
May 2013

CRM 4.0.1.0.0 Service Pack Installation Guide

Introduction

Oracle Financial Services (OFS) Credit Risk Management (CRM) provides a single consistent view of portfolio credit risk across the entire organization. The application consists of four components: Enterprise Credit Risk, Wholesale Credit Risk, Retail Credit Risk, and Counterparty Credit Risk. This service pack consists of fixes, enhancements, and updates, which is to be applied on OFS CRM 4.0.0.0.0.

Description

Bug 16559153 - CREDIT RISK MANAGEMENT V4.0.1.0.0 SERVICE PACK

Technical and Functional Issues Fixed

- 16499196 - CRM SLICED MODEL HAS TO INCLUDE THE LATEST FSDF 7.4 DATA MODEL CHANGES
- 16503102 - LATEST T2T FOR COMMON ACCOUNT SUMMARY AND COMMON CUSTOMER SUMMARY
- 16503080 - NEW TABLE FOR FCT_PARTY_FINANCIALS FOR REPORTING PURPOSE.
- 16503073 - MITIGANT T2T NEEDS TO BE MODIFIED.
- 16503105 - LATEST SCD MAPPING NEEDS TO BE INCORPORATED.
- 16503132 - WEIGHTED AVERAGE PROBABILITY OF DEFAULT TREND. WAPD IS WRONG
- 16503141 - FCT_PARTY_FINANCIALS NEEDS TO BE REMOVED
- 16503119 - ALL DT/FUNCTIONS NEED TO BE WRAPPED.
- 16503066 - DIM_PARTY AND DIM_CUSTOMER POPULATION (SCD AND FUNCTION) HAVE TO BE MODIFIED
- 16503113 - USER MANUAL NEEDS TO BE MODIFIED

Prerequisites

Before applying this service pack patch, ensure that the following requirements are met:

- Oracle Financial Services Analytical Applications Infrastructure (OFSAAI) v7.3.2.1.2 is already installed and configured.
- OFS Credit Risk Management Release 4.0.0.0.0 is already installed and configured.

Procedure to Apply Patch

To apply this service pack patch, refer to the following steps:

1. Copy the file '16559153_Generic.zip' in binary mode to a temporary folder on the server where OFSAAI is installed. Extract the contents of the zip file by executing the command **unzip -a 16559153_generic.zip**.

Note:

For a multi-tier installation of OFSAAI, the patch should be executed on the Application, Database, and Web tiers.

2. Update the 'params.conf' file with appropriate values for INFODOM, SEGMENT_CODE, FTPSHARE_PATH, OFSAAI_USER_ID, CONF_USER, CONF_PWD, CONF_SID, APPL_USER, APPL_PWD, and APPL_SID.
3. Provide RWX permissions to the shell script 'install.sh'.
4. Execute 'pre_model_scripts/compile_atomic.sql' on the atomic schema of the information domain in which OFS Credit Risk Management is installed.

Note:

- These pre_model_scripts are valid only for a standalone standard OFS Credit Risk Management v4.0.0.0.0 installation. For customized and an integrated environment, ensure that you take a backup as per data model dependencies in pre_model_script.
-

5. Execute 'pre_model_scripts/compile_config.sql' on the config schema of the information domain in which OFS Credit Risk Management is installed.

Note:

- These pre_model_scripts are valid only for a standalone standard OFS Credit Risk Management v4.0.0.0.0 installation. For a customized and integrated environment, ensure that you take a backup as per data model dependencies in pre_model_script.
 - ##INFODOM## is the place holder for the Infodom Name.
-

6. Perform an incremental model upload. The following cases explain in brief, the two different scenarios to upload the data model.

Case 1: Oracle Financial Services Oracle Financial Services Credit Risk Management is the only application installed.

If the CRM v4.0 data model has not been customized, upload OFS CRM v4.0.1.0.0 Slice Data Model (Erwin 7.1.2).xml present under the data model folder into OFSAAI.

Case 2: Oracle Financial Services Credit Risk Management is installed along with other applications.

In the above case, refer to the following steps:

- i. Merge the Credit Risk Management data model [OFS CRM v4.0.1.0.0 Slice Data Model (Erwin 7.1.2)] with the integrated model already available in the OFSAAI platform.
 - ii. Perform an incremental model upload of the new merged model.
7. Stop all the OFSAAI Services and execute **install.sh**.
8. Check the logs folder to see if the patch is applied successfully. The following ORA errors in the log file can be ignored:
 - ORA-02275: such a referential constraint already exists
 - ORA-02260: table can have only one primary key

Note:

A backup of the tables are already taken as a part of this service pack installer. For more information on restoring data, see *CRM 4.0.1.0.0 Service Pack Data Migration Guide*.

9. Copy the file `jaxrpc.jar` from the path `<OFSAAI Install Directory>/axis-1_4/webapps/axis/WEB-INF/lib` to `<OFSAAI Install Directory >/ficweb/webroot/WEB-INF/lib` (applicable if the web server is Tomcat).
10. In the command prompt, navigate to the `$FIC_WEB_HOME` directory of WEB tier and execute the **./ant.sh** command. This will trigger the creation of EAR file- `<contextname>.ear`. The EAR file - **<contextname>.ear** - is created in `$FIC_WEB_HOME` directory of WEB tier. On completion of EAR file creation, the message "BUILD SUCCESSFUL" is displayed.
11. Deploy this EAR file in the Webserver.
12. If Oracle Financial Services Limit Management link is required :
 - a. Navigate to `$FIC_APP_HOMEcommon/FICServer/conf`
 - b. Open the `CustomLHSMenu.xml` file and add the following entry immediately after the `<MENU>` tag

```
<MENUITEM ID="LM" PROTECTED="false" LINK_TEXT="Limit
Management" LINK_IMAGE="images/tree_icons_ror.gif"
URL="formsFramework/menu/LMindex.jsp"
TOOLTIP_TEXT="Forms Framework" FGCOLOR="#000000"
FONT_FACE="Arial,Helvetica" FONT_STYLE="normal"
FONT_SIZE="12"
BGIMAGE="images/rev_menu_orange.gif"
CLOSE_ON_LOGOUT="false" ALLOWS_DUPLICATE="false"
FUNCTION_LIST="SCR_LIM"
HELP_LINK="help/help_en_US/ROR/helpfile.htm"
HELP_IMAGE="images/rev_menu_help.gif">
```

```
<PARAMETERS>  
<PARAM NAME="dsn" VALUE="%{dsn}" />  
</PARAMETERS>  
</MENUITEM>
```

Note:

Ensure that you are mapped to the Limit Management Role, to access Oracle Financial Services Limit Management.

13. Start all OFSAAI Services and generate the Source Model.
14. Re-save all the metadata.
15. For RPD and Catalog deployment, see *OFS Credit Risk Management v4.0.0.0.0 – Configuration Note* in the CRMBI folder.



Installation Manual
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