Installation Manual
Oracle Financial Services Credit Risk Management
Release 4.0.2.0.0
May 2014

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FINANCIAL SERVICES

Document Control

Version Number	Revision Date	Changes Done
Version 4.0.2.0.0	Revised on May 2014	Updated the Environment and Generic Software section to qualify on OEL/RHEL 5.3 / 5.5 - Oracle 11g R2 (11.2.0.2.0) - Tomcat 7.0.19 (64 bit), the grants for atomic schema user, and updated the snapshots.
Created and Edited by: Dilip/Sindhu	Reviewed By : Venkata Subbaiah Bheemagoni	Approved by : Kumaran Krishnan

Executive Summary

The document consists of all the installation, Pre and Post configuration procedures which have been structured considering all the 4.0.2.0.0 enhancements. You can find the latest copy of this document in OTN library which includes all the recent additions/revisions (if any) done till date.

Before you begin the installation, ensure that you have an access to Oracle Support Portal with the required login credentials to quickly notify us for any specific issues. You can obtain one by contacting Oracle Support.

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1. **Getting Started**

1.1 **Oracle Financial Services Analytical Applications Infrastructure Overview**

Oracle Financial Services Analytical Application Infrastructure (OFSAAI) is an analytical application platform which has been architected to be multi-tiered and open-systems compliant. OFSAAI is fully web-enabled. It's a 100% thin-client, browser-based interface with zero foot print which dramatically reduces the cost of application deployment. All OFSAAI processes, including those related to business, are metadata-driven, thereby providing a high degree of operational and usage flexibility, and a single consistent view of information to all users.

OFSAAI product suite includes a rules-framework designer engine, Unified Metadata Manager which has a semantic layer of metadata abstraction that is common over both relational and OLAP repositories.

1.2 **Analytical Applications Overview**

Analytical Applications like Oracle Financial Services Credit Risk Management are pre-packaged on OFSAAI and are ready to install.

With the help of Oracle Financial Services Credit Risk Management, we aim to provide a single consistent view of portfolio credit risk across the entire organization.

OFS Credit Risk Management consists of four key components:

- Enterprise Credit Risk

- Wholesale Credit Risk

- Retail Credit Risk

- Counterparty Credit Risk

1.3 **Audience**

This manual is meant for the OFSAAI Application System Administrator as they play an integral part in installing the Oracle Financial Services Analytical Applications.

1.4 **Scope**

The information contained in this document is intended to give you a quick exposure and an understanding of the installation procedures to install the Oracle Financial Services Credit Risk Management.

The document also deals with the information related to the OFS Credit Risk Management installation process and the topics are designed in the order of priority with related procedures to assist, configure, and manage the administrative tasks effectively.

1.5 Organization of the Manual

The Installation Manual is organized into the following chapters:

- **Preinstallation Configuration** section consists of the pre-configuration activities that are to be completed successfully for proper installation and functioning of the application.

- **Installing the Analytical Application** section details the steps to be followed during the installation.

- **Post Installation Activities** section details the steps that are required to be performed after the successful installation of the Oracle Financial Services Credit Risk Management Release 4.0.2.0.0.

1.6 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

- 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**.

2. **Pre-installation Configuration**

The list of pre-configurations required to install and run the OFSAAI 7.3.3.3.0 Infrastructure is stated in this section. Further, the installation process requires certain environmental variables to be set prior to starting the installation. Ensure the following requirements are met before installation.

- [Prerequisites](#)

- [Environment](#)

- [Generic Software](#)

- [Preinstallation Activities](#)

- [Pre-Upgrade Activities](#)

2.1 Prerequisites

- Infrastructure version 7.3.3.3.0 and the CRM 4.0.1.0.0 (only for upgrade) should be available.

  Refer to *OFSAAI Installation and Configuration Guide*.

2.2 Environment

RHEL 5.3 / 5.8 - OEL 5.3 / 5.8 - Oracle 11g R2 (11.2.0.2.0) - Web logic 10.3.5.0 / Websphere 7.0.0.17 / Tomcat 7.0.19 (64 bit)

Type	Description
OS	- Red Hat Enterprise Linux Server release 5.8 (Tikanga) - 64 bit - Oracle Enterprise Linux Server release 5.8 (Carthage) - 64 bit - Red Hat Enterprise Linux Server release 5.3 (Tikanga) - 64 bit - Oracle Enterprise Linux Server release 5.3 (Carthage) - 64 bit
Infrastructure Application Server	- Oracle Client 11g R2 (11.2.0.2.0) - 64 bit - Sun JDK Standard Edition 1.6.0_25 - 64 bit - Sun JRE Standard Edition 1.6.0_25 - 64 bit

Type	Description
Infrastructure Database Server	• Oracle Database Server 11g Release 2 (11.2.0.2.0)-64 bit with or without RAC [Enterprise edition with partitioning capability] • Sun JDK Standard Edition 1.6.0_25 - 64 bit • Sun JRE Standard Edition 1.6.0_25 - 64 bit • Oracle Hyperion Essbase 11.1.2.1.0 (Server and Client)
Infrastructure Web Server	• Oracle 11g R2 (11.2.0.2.0) JDBC driver (Oracle thin driver) • Sun JRE Standard Edition 1.6.0_25 - 64 bit • Sun JDK Standard Edition 1.6.0_25 - 64 bit • Web logic 10.3.5.0 with JDK Standard Edition 1.6.0_25 -64 bit • Websphere 7.0.0.17 with IBM Runtime, Java Technology JDK 1.6.0 (SR9 FP1) - 64 bit • Apache Tomcat 7.0.19 pointing to JDK Standard Edition 1.6.0_25 - 64 bit **Note the following**: Any one of the above mentioned web servers (Web logic, Websphere, or Apache Tomcat) installation is required based on the requirement.
Reporting Tool	Oracle Business Intelligence Enterprise Edition Suite – 11.1.1.7.1

Solaris 5.10 - Oracle 11g R2 (11.2.0.2.0) - Web logic 10.3.5.0 / Websphere 7.0.0.17 / Tomcat 7.0.19 (64 bit)

Type	Description
OS	Oracle Solaris v5.10 Update 9 (9/10 s10s_u9wos_14a) SPARC sun4v - 64 bit
Infrastructure Application Server	• Oracle Client 11g R2 (11.2.0.2.0) - 64 bit • Sun JDK Standard Edition 1.6.0_25 - 64 bit • Sun JRE Standard Edition 1.6.0_25 - 64 bit

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Type	Description
Infrastructure Database Server	- Oracle Database Server 11g Release 2 (11.2.0.2.0)-64 bit with or without RAC [Enterprise edition with partitioning capability] - Sun JRE Standard Edition 1.6.0_25 - 64 bit - Sun JDK Standard Edition 1.6.0_25 - 64 bit - Oracle Hyperion Essbase 11.1.2.1.0 (Server and Client)
Infrastructure Web Server	- Oracle 11g R2 (11.2.0.2.0) JDBC driver (Oracle thin driver) - Sun JRE Standard Edition 1.6.0_25 - 64 bit - Sun JDK Standard Edition 1.6.0_25 - 64 bit - Web logic 10.3.5.0 with JDK Standard Edition 1.6.0_25 -64 bit - Websphere 7.0.0.17 with IBM Runtime, Java Technology JDK 1.6.0 (SR9 FP1) - 64 bit - Apache Tomcat 7.0.19 pointing to JDK Standard Edition 1.6.0_25 - 64 bit **Note the following**: Any one of the above mentioned web servers (Web logic, Websphere, or Apache Tomcat) installation is required based on the requirement.
Reporting Tool	Oracle Business Intelligence Enterprise Edition Suite – 11.1.1.7.1

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AIX 5.3 (ML 12) & AIX 6.1 (ML 07) - Oracle 11g R2 (11.2.0.2.0) - Web logic 10.3.5.0 / Websphere 7.0.0.17 / Tomcat 7.0.19 (64 bit)

Type	Description
OS	- AIX 5.3 (ML 12) - 64 bit - AIX 6.1 (ML 07) - 64 bit
Infrastructure Application Server	- Oracle Client 11g R2 (11.2.0.2.0) - 64 bit - IBM AIX Runtime, Java Technology JRE 1.6.0 (SR10) - 64 bit - IBM AIX Runtime, Java Technology JDK 1.6.0 (SR10) - 64 bit
Infrastructure Database Server	- Oracle Database Server 11g Release 2 (11.2.0.2.0)-64 bit with or without RAC [Enterprise edition with partitioning capability] - IBM AIX Runtime, Java Technology JRE 1.6.0 (SR10) - 64 bit - IBM AIX Runtime, Java Technology JDK 1.6.0 (SR10) - 64 bit - Oracle Hyperion Essbase 11.1.2.1.0 (Server and Client)
Infrastructure Web Server	- Oracle 11g R2 (11.2.0.2.0) JDBC driver (Oracle thin driver) - IBM AIX Runtime, Java Technology JRE 1.6.0 (SR10) - 64 bit - IBM AIX Runtime, Java Technology JDK 1.6.0 (SR10) - 64 bit - Web logic 10.3.5.0 pointing to IBM AIX Runtime, Java Technology JDK 1.6.0 (SR10)- 64 bit - Websphere 7.0.0.17 pointing to IBM Runtime, Java Technology JDK 1.6.0 (SR9 FP1) - 64 bit - Apache Tomcat 7.0.19 pointing to IBM AIX Runtime, Java Technology JDK 1.6.0 (SR10)- 64 bit **Note the following**: Any one of the above mentioned web servers (Web logic, Websphere, or Apache Tomcat) installation is required based on the requirement.
Reporting Tool	Oracle Business Intelligence Enterprise Edition Suite – 11.1.1.7.1

2.3   Generic Software

Type	Description
Other Software	OFSAAI is certified on both OPEN LDAP 2.2.29+ and Oracle Internet Directory v11.1.1.3.0. Ensure that you have installed any one of the following for OFSAAI authentication purposes. **Note**: OPEN LDAP needs to be installed on Microsoft Windows machine only. Hummingbird **Exceed** 7.0 has to be installed on a Microsoft Windows machine as a simulator for remote installation. **Note**: Hummingbird Exceed is required for GUI Mode of installation.
Front End Access	Microsoft Internet Explorer 8/9 Microsoft Office 2003/2007 Client Machines – Windows XP SP3/Windows 7 The screen resolutions supported are 1024*768 and 1280*1024 Adobe Reader 8.0 Java Plug-in 1.6.0_21 **Note**: • Ensure that Java Plug-in is enabled in the browser settings. • Enable caching of static content (static files, images, CSS, etc) for browser client. • Cookies should be disabled.

2.4   Preinstallation Activities

The following is the preinstallation checklist to ensure the readiness to start installing OFS Credit Risk Management Application:

• Oracle Financial Services Analytical Applications Infrastructure Release 7.3.3.3.0 must be successfully installed on, RHEL 5.3 /5.5, OEL 5.3/5.5 – Tomcat 7.0.19– 64 bit environment.

NOTE:

Refer the *Appendix B section in the [OFSAAI 7.3.3.0.0 Installation Guide](#)* for customized memory settings for model upload, depending on the available hardware configuration. For guidance in altering the memory settings contact [Oracle Support](#)

- If the infrastructure is installed on a multitier environment, then execute the following commands in the DB Layer terminal:

```
chmod -R 777 < ftpshare folder >
```

- Navigate to the ftpshare folder and set the umask shown as follows to ensure that all the new files created have 666 file permissions.

```
cd < ftpshare folder >
umask 0000
```

- The config and atomic schema should be of two distinct oracle database users.

Note:

To create a new Information Domain and Atomic schema needs to be created manually.

- The Information Domain schema makes use of the tables from the configuration schema. To create a new information domain, execute the file **<Infrastructure Database Layer Install Directory>/config_table_privileges_for_atomic_user.sql** from the Infrastructure config database before creating the new information domain. These Privileges should be given to the Production Schema (essentially all the Atomic schemas).

- Add an Atomic schema TNS entry to TNSNames.ora.

- The following grants must be given to atomic schema user:

```
grant create session to ATOMIC_USER
grant create synonym to ATOMIC_USER
grant create view to ATOMIC_USER
grant create sequence to ATOMIC_USER
grant create table to ATOMIC_USER
grant create procedure to ATOMIC_USER
grant create trigger to ATOMIC_USER
grant debug connect session to ATOMIC_USER
grant create any index  to ATOMIC_USER
grant create type to ATOMIC_USER
grant connect, resource to ATOMIC_USER
grant debug any procedure to ATOMIC_USER
grant create database link to ATOMIC_USER
grant create any directory to ATOMIC_USER
grant query rewrite to ATOMIC_USER
grant create any materialized view to ATOMIC_USER
```

- Copy all the contents of the Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 installer download directory to the server location (including the Data Model directory). Provide read, write and execute permission to all the files present in this directory.

- Specify the log file path and name in the log4j.xml. Update the value attribute highlighted in the following figure:

```
<?xml version="1.0" encoding="UTF-8" ?>

<log4j:configuration
xmlns:log4j="http://jakarta.apache.org/log4j/">

<appender name="ConfigReveleusFileAppender"
class="org.apache.log4j.RollingFileAppender">

 <param name="file" value="/<installer components copied
directory>/installer.log"/>

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

- Ensure the path given in the log4j.xml file has read, write or execute permission.

- Execute the **config_table_privileges_for_atomic_user.sql** script in configuration schema. This file is present in the $FIC_HOME directory.

- Ensure FICServer is up and running before proceeding for installation.

- From SYS DBA grant select permission to config and atomic user for 'V_$PARAMETER' table.

```
            grant select on V_$PARAMETER to &config_db_user;

            grant select on V_$PARAMETER to &atomic_db_user;
```

- Check for **export LDR_CNTRL=MAXDATA=0x40000000** in the .profile. If present then comment it, execute the .profile and then trigger the Setup.sh.

- For a multitier installation, check whether **Reveleus.SEC** file is present in **$FIC_HOME/conf in web layer**. If this file is not present in this path, then copy the file from **$FIC_HOME/conf in app layer** to **$FIC_HOME/conf in web layer**.

- For a single tier installation, the installer is required to be loaded only once on the machine that hosts all the OFSAAI tiers.

2.5 Pre-Upgrade Activities

This section is applicable only for users upgrading from OFS CREDIT RISK MANAGEMENT version 4.0.1.0.0 to OFS CREDIT RISK MANAGEMENT version 4.0.2.0.0.

Prior to the upgrade, take a back up of the existing Atomic Schema and related OBIEE objects (Repository, Images, and Catalog file) that are upgraded. This can be used to restore the application in case of any failures during the upgrade.

Back-up of Database schema and Files

- Back-up the existing config and atomic schema of the information domain that is upgraded. This can be used to restore the application, in case of any failures during upgrade.

- Back-up FTPSHARE, $FIC_HOME and FIC_WEB_HOME webroot folders of the existing environment.

Data Model Changes

If Data model is not customized, following steps will be done by the upgrade installer. The new RPD and Catalog needs to be deployed manually:

1) OFS CREDIT RISK MANAGEMENT version 4.0.2.0.0 sliced data model is uploaded in "Sliced Model Upload" mode.

2) Execute the Config and atomic scripts.

3) Replace XMLs, executables and other components

If Data Model is customized, then it is suggested to:

1. Open customized and out of box models using ERwin Data Modeler tool.

2. Go to "**Tools**" and select "**Complete Compare**".

3. Select the existing CRM Data model on Left Model, in the Compare window.

4. Select the extracted CRM Data model on Right Model.

5. In "**Type Selection**" check "**Subject Area**".

6. In "**Advanced**" option, un-check ALL except "**Auto Close Database/Script Models**" and click "**Compare**".

7. Resolve differences by applying all the changes mentioned in the Difference.xls file.

8. Click "**Finish**" and click "**Close**".

9. Save the file as XML in "**AllFusion Repository Format**".

    Example: CRM_Datamodel.xml

Difference.xls

The metadata and the PR2 objects that were available in OFS CRM 4.0.1.0.0 and not used in any segments of OFS CRM 4.0.2.0.0 are deleted during the pre upgrade process.

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3. **Installing the Analytical Application**

3.1   **OFS Credit Risk Management Release 4.0.2.0.0 Installation**

The OFSAAI comprises of components that are installed in Web, Application and Database layer. Hence, if you have installed OFSAAI Release 7.3.3.3.0 in a multitier architecture, the Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 installer must be loaded on each of the machines that host the Oracle Financial Services Analytical Applications Infrastructure tier.

This section describes the installation process in which the three product setup components with the product are installed on separate machines as follows:

- Machine A is used to install the product Application Layer components

- Machine B is used to install product Database Layer components

- Machine C is used to install product Web Layer components

Note:

This section holds applicable if OFSAAI Release 7.3.3.3.0 is installed on RHEL 5.3/5.5, OEL 5.3/5.5 server - Oracle 11g on separate machines A, B, and C respectively.

For Silent Installation, refer to the section Silent Mode.

3.1.1   <u>Machine A – Product Application Layer</u>

Step 1

To begin with the OFS Credit Risk Management Release 4.0.2.0.0 installation, execute **Setup.sh** with the parameter GUI (GUI Installation) or SILENT (for Silent installation).
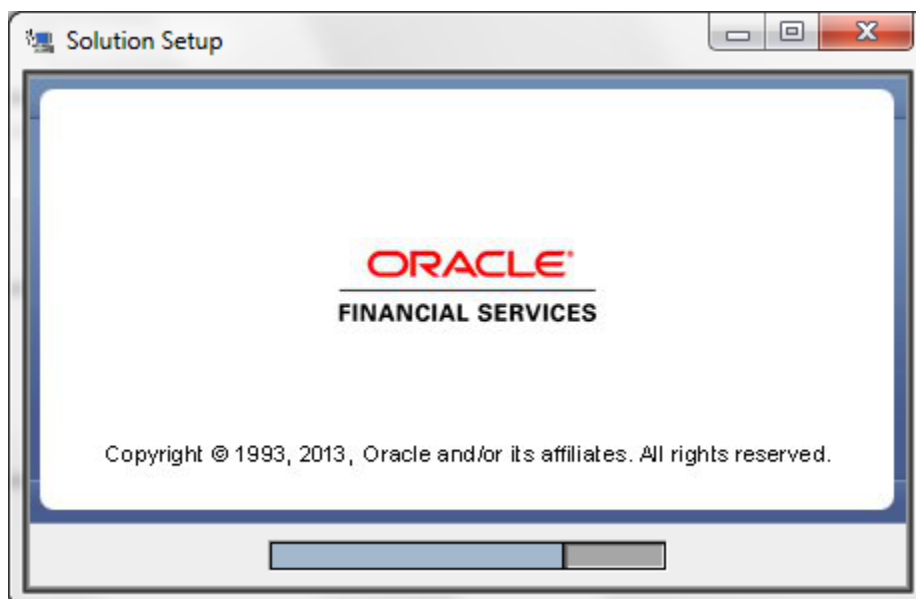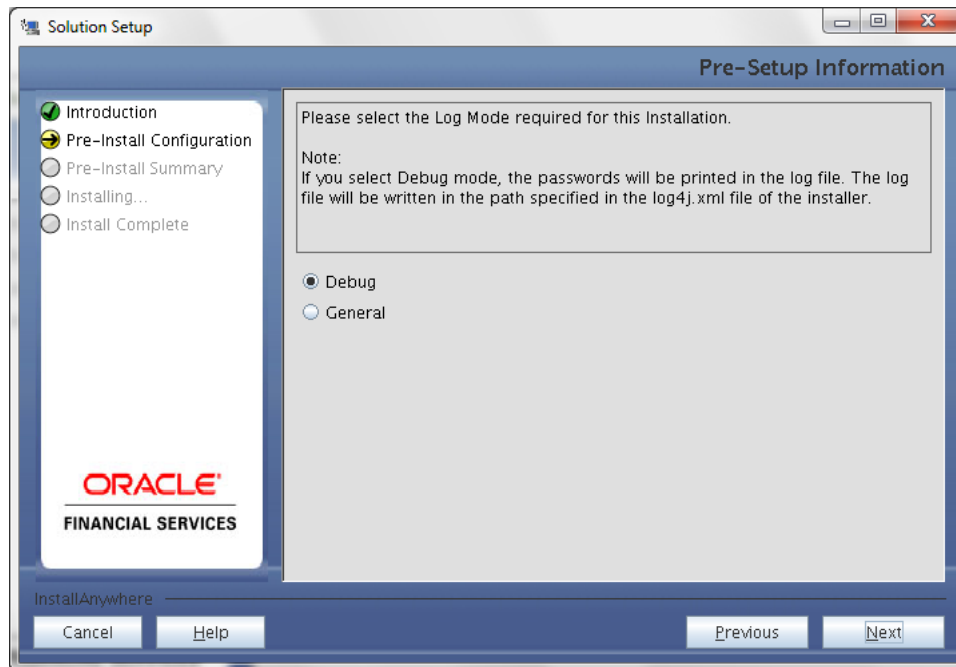

Step 2

On loading the installer, the **Introduction** screen displays the prerequisites for installation. Ensure
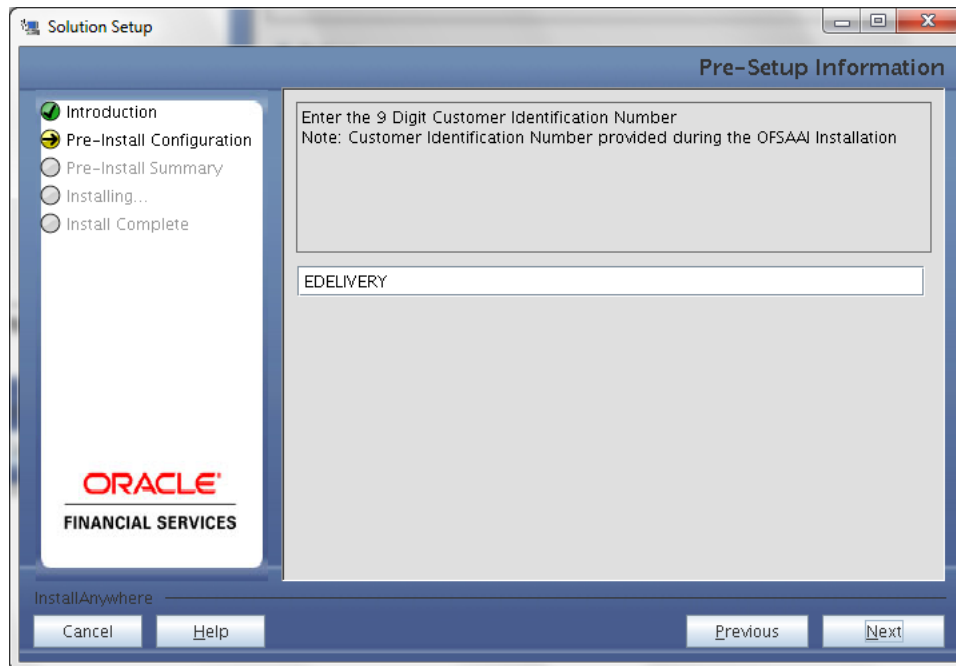
that these prerequisites are met before proceeding.
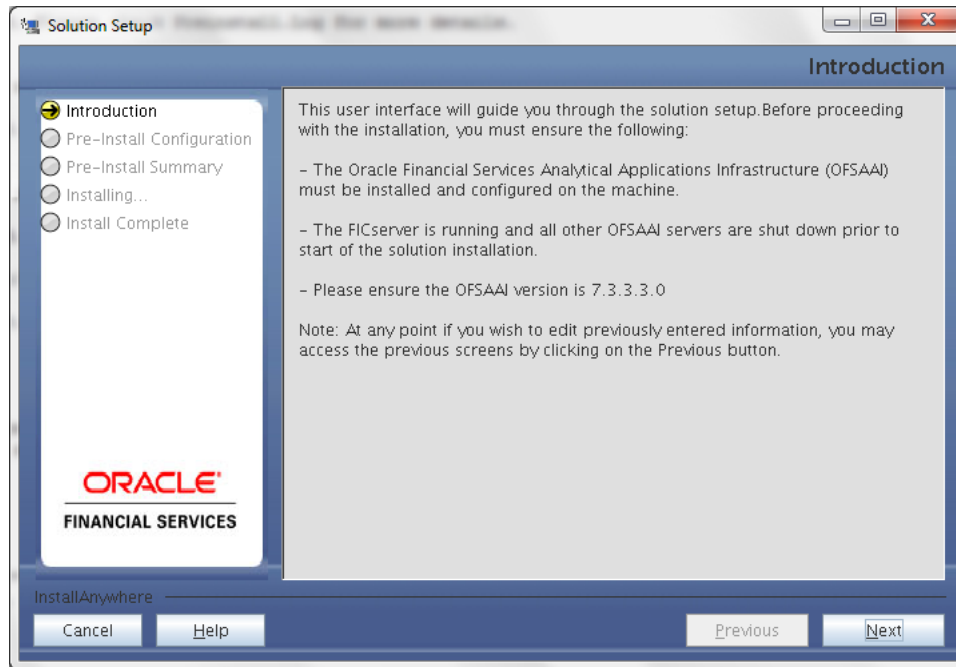
Step 3

Choose the log mode for this installer. The **Debug** and **General** mode information will be printed in the log file specified in the log4j.xml file of the installer.

Step 4

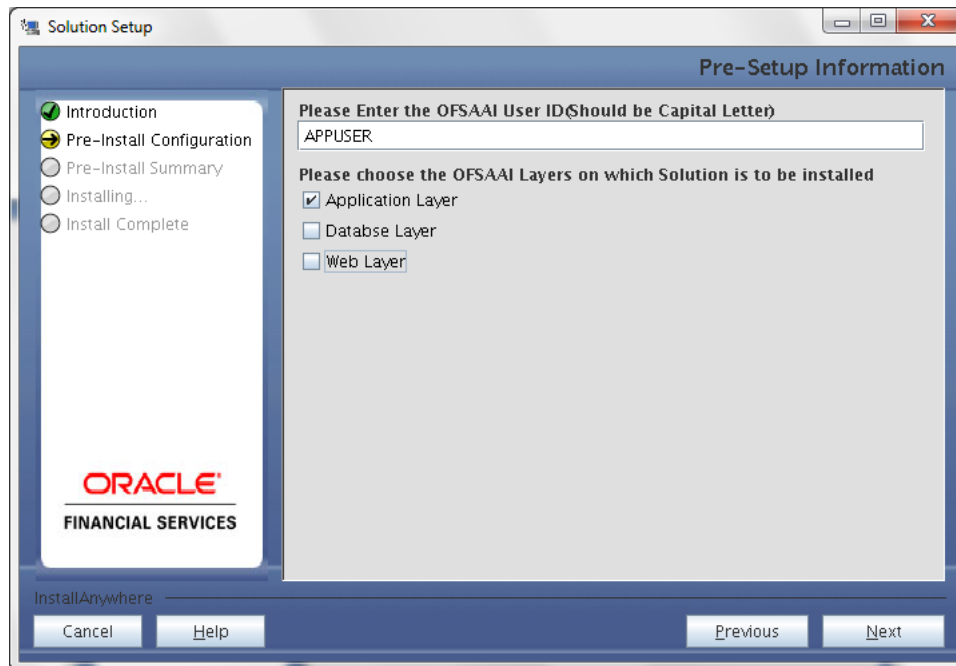Enter the Customer Identification Number and click **Next** to continue.

Step 5

In the next screen enter the OFSAAI User ID.

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

Example: **Application Layer**

Note:

- Create the User in Infrastructure which was specified during installation process, if it does not exist.

- For a single-tier Oracle Financial Services Analytical Applications Infrastructure Release 7.3.3.3.0 installation, you must select Application Layer and Database Layer.

- For a multitier Oracle Financial Services Analytical Applications Infrastructure Release 7.3.3.3.0 installation, select the corresponding layer installed on the machine.

Step 6

This screen seeks infromation on whether a new Information Domain has to be created or the existing Information Domain is to be used for installation. Choose the required option.
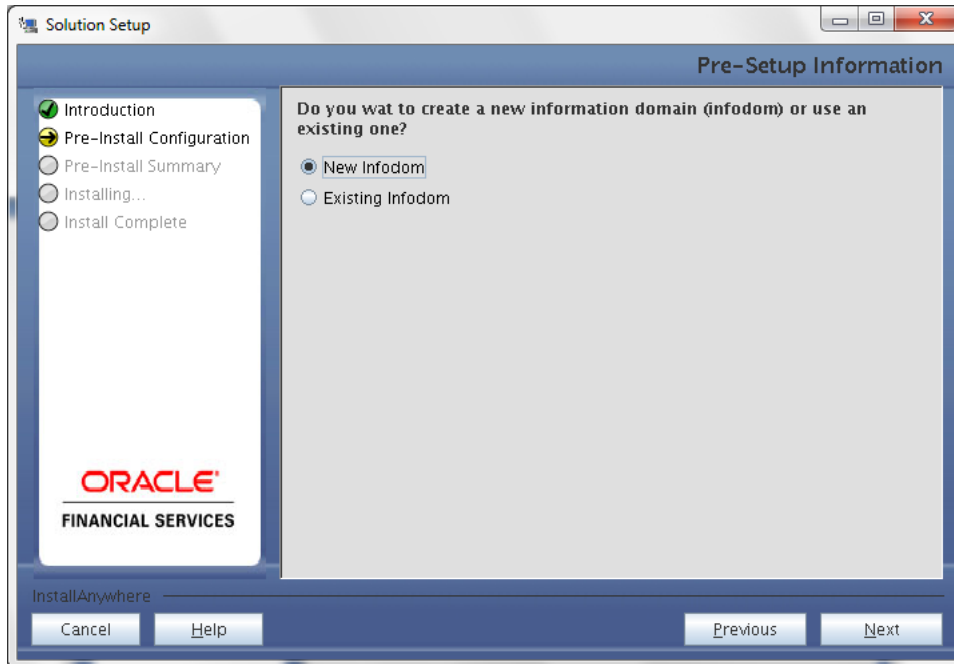
Click **Next** to continue. If **New Information Domain** is selected then go to **Step 7** or else go to **Step 8**.

Step 7

If the option **New Information Domain** is selected then update the following to create information domain:

Step 7-i:

- Specify a Database Name for the new information domain. Make a TNS entry with the Database Name specified in the tnsname.ora file in the oracle server.

- Enter the newly created application schema user name, password, and JDBC URL in the relevant fields.

Click **Next** to continue.
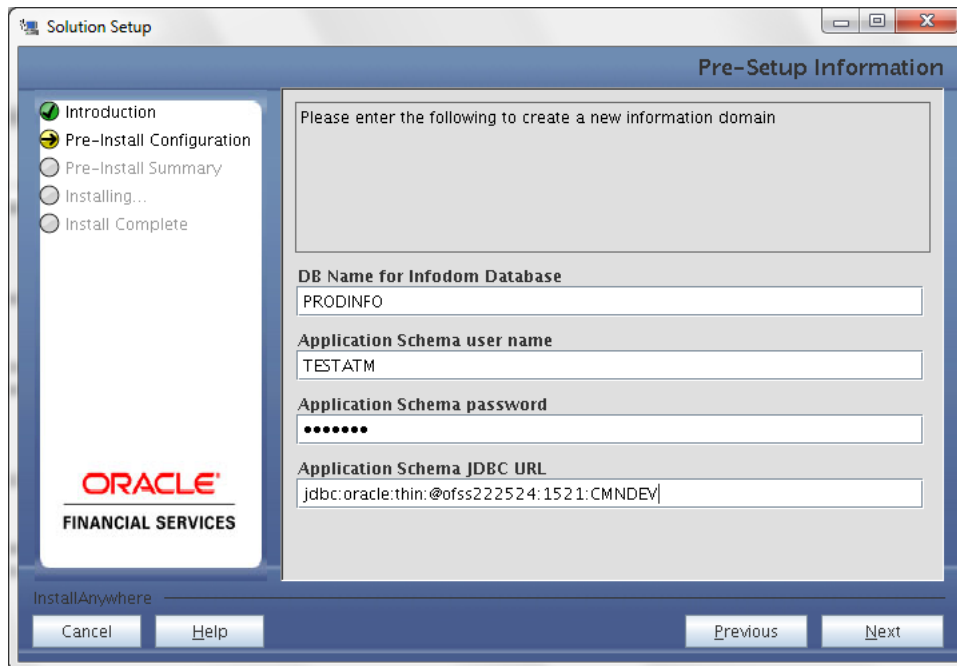
Database details for the New Information Domain

Step 7-ii

In the next screen enter the following details:

- Specify the name and description of the new information domain to be created.

- Specify a segment name to be created.

- Specify the application server and database server log path for information domain maintenance (to be created).
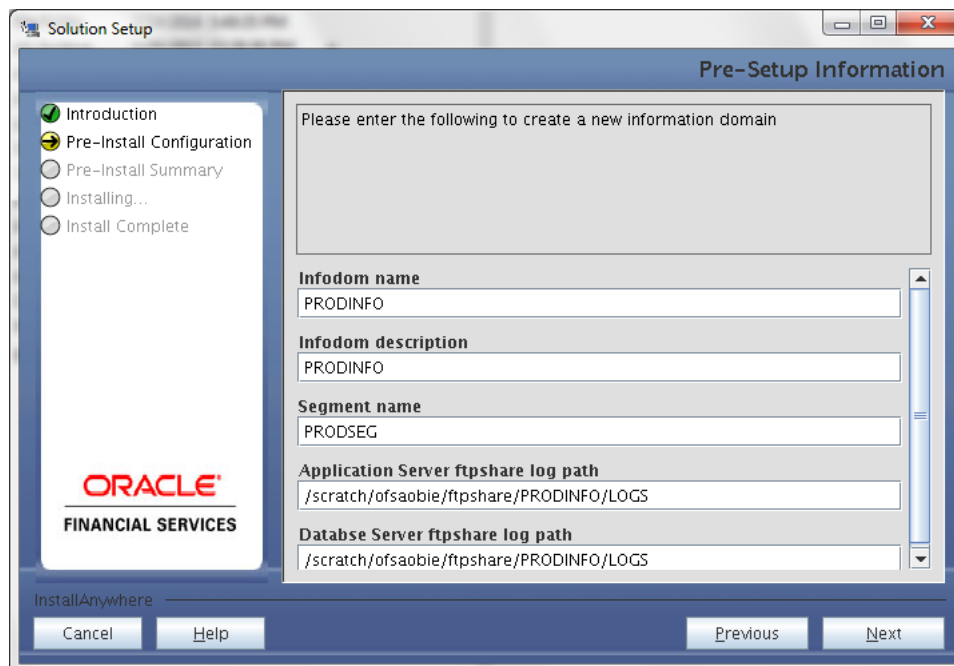
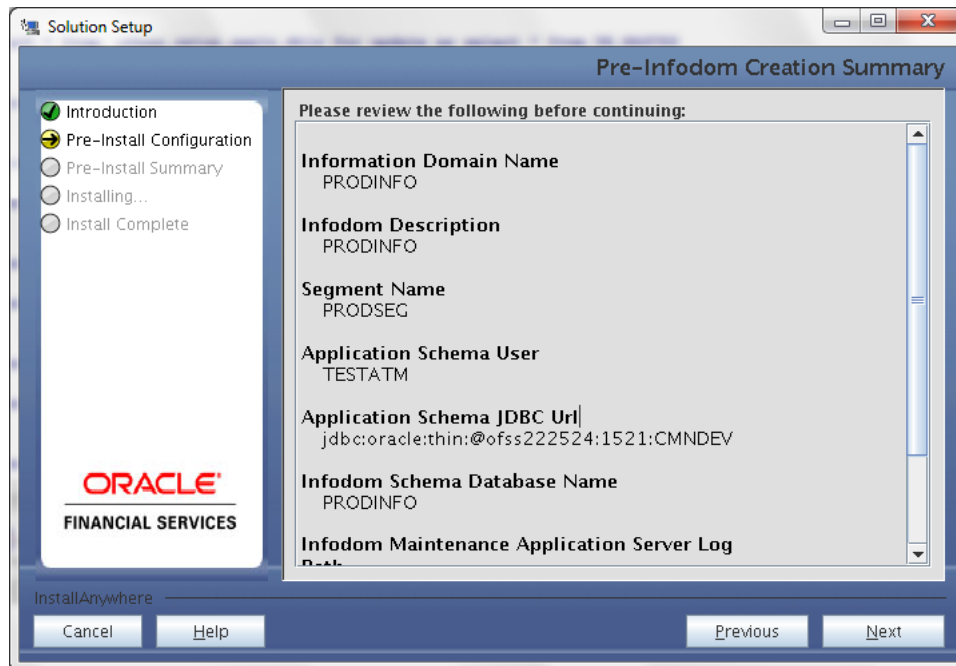**Information Domain details for creation of new Information Domain**

Note:

The OFSAAI user must have a role mapped to perform Add/Modify functions for OFS Credit Risk Management metadata.

Click **Next** to continue. Check and verify all the details before proceeding to Step 7- iii.

Step 7-iii

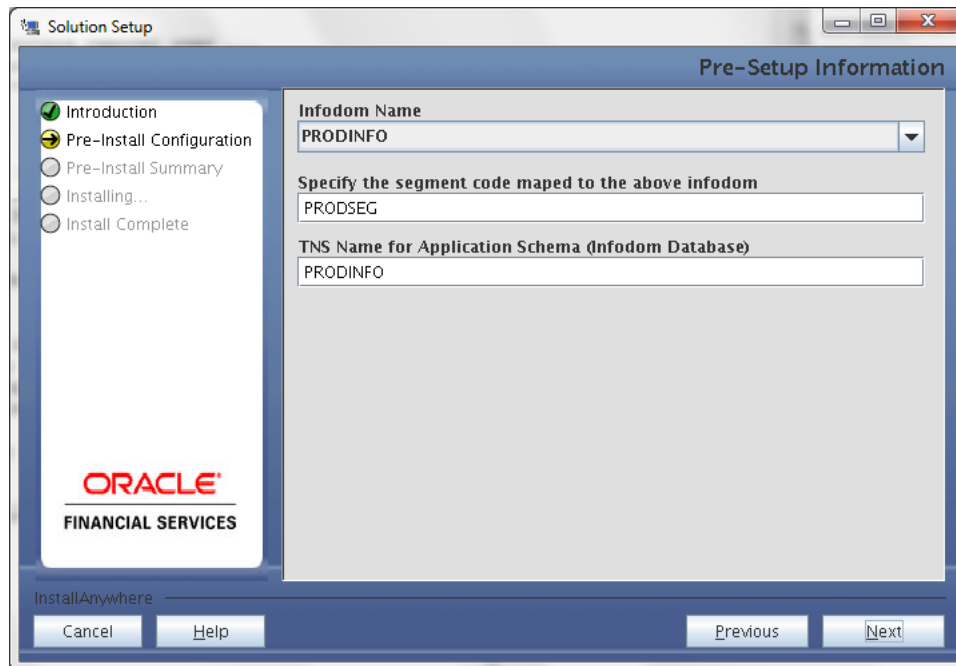Click **Next** to continue with the creation of information domain.

Pre-information domain Creation Summary

Step 8

If the option Existing Information Domain was selected then update the following details in the screen prompt that is displayed:

Step 8-i

- Select the Information Domain name

- Enter segment code.

- For additional segments click the checkbox.

Installation in Progress

Step 9

Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 data model is packaged as part of the application installer and is installed as a part of the following steps, if required.

In the the following screen opt for Model Upload process through the installer.

- Click **Yes**, if you wish to configure the sandbox. The installer seeks details for new information domain creation for sandbox.
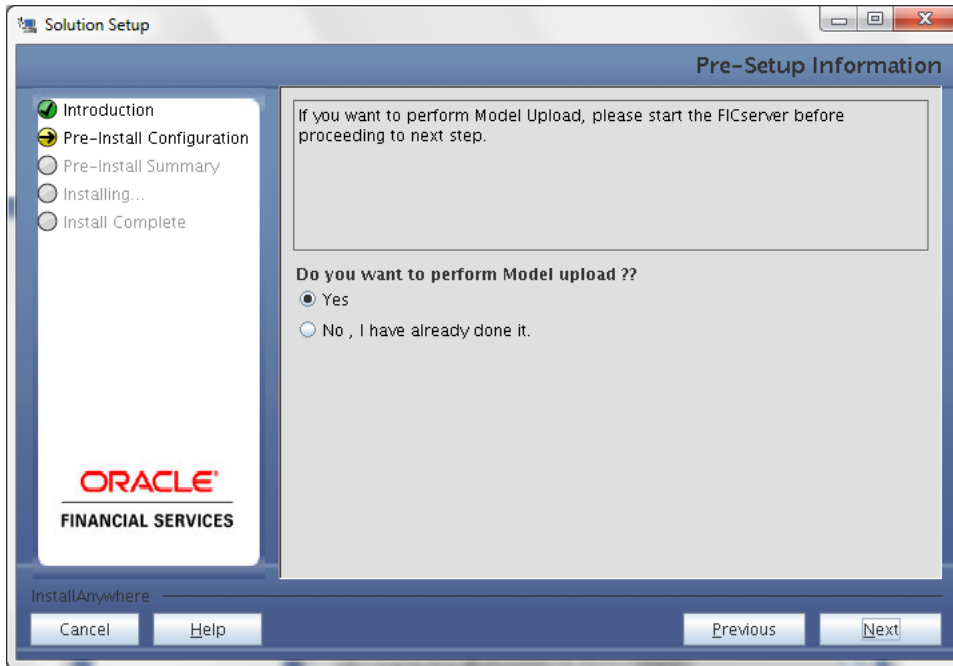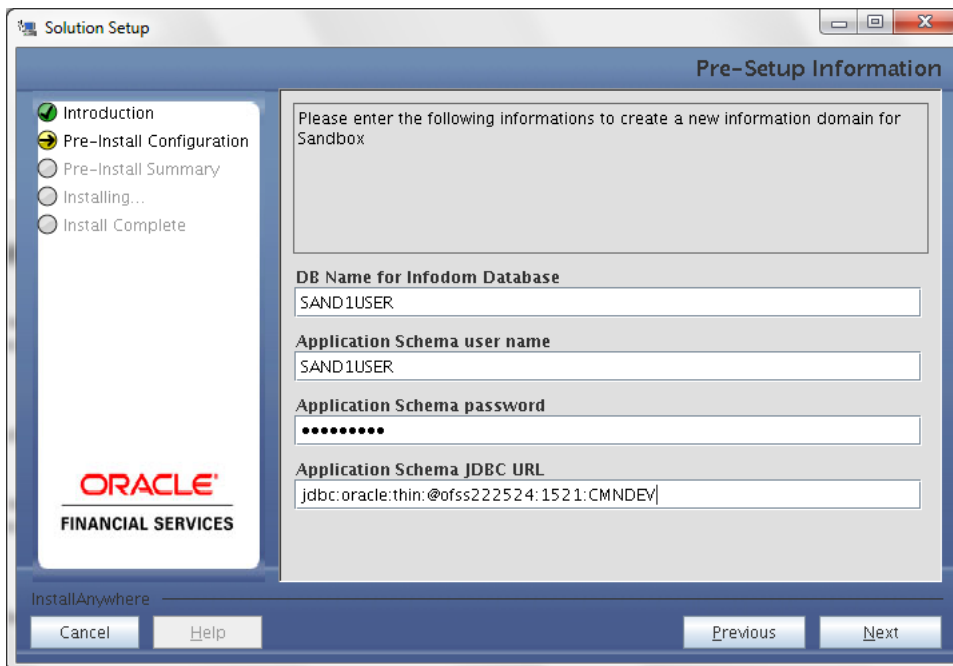
Pre-Setup Information

Step 9 -i:

- Specify a DB name for the new infodom. Make a TNS entry with the DB name specified in the tnsname.ora file in the oracle server.

- Enter the newly created application schema's user name, password and JDBC url in relevant fields.
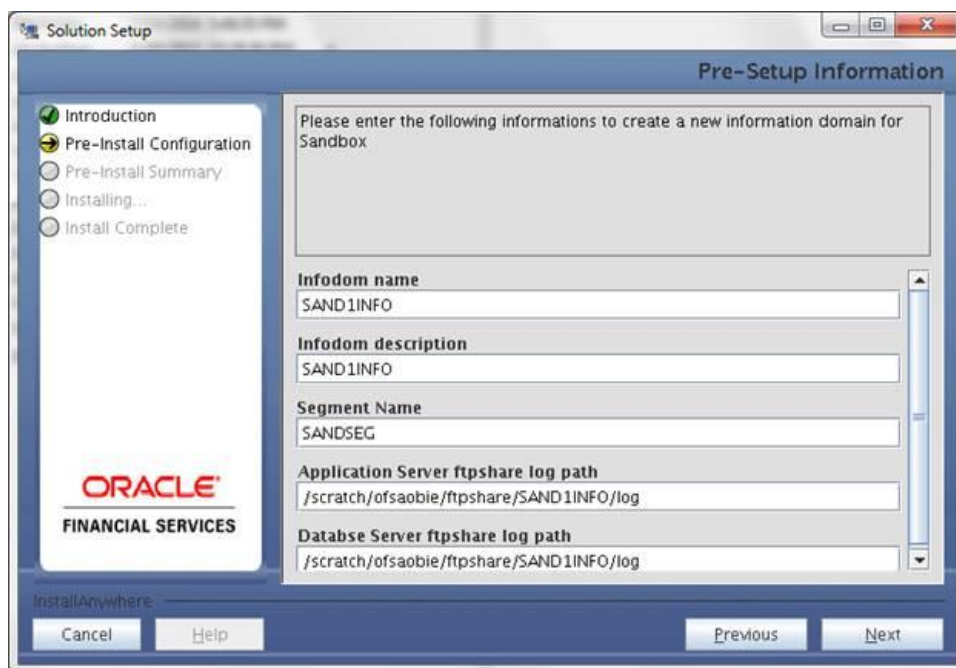
Click **Next** to continue.

Step 9-ii
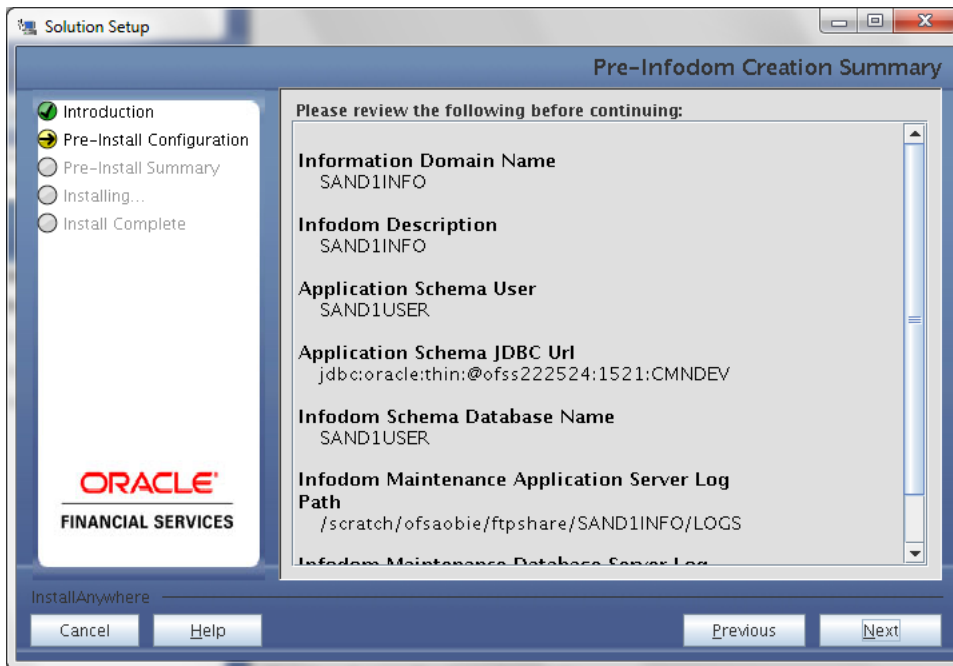
In the next screen prompt, enter the following details:

* Specify the name and description of the new information domain for sandbox to be created.

* Specify the application server and database server log path for infodom maintenance (to be created).

Step 9-iii

Click **Next** to continue with the creation of information domain.
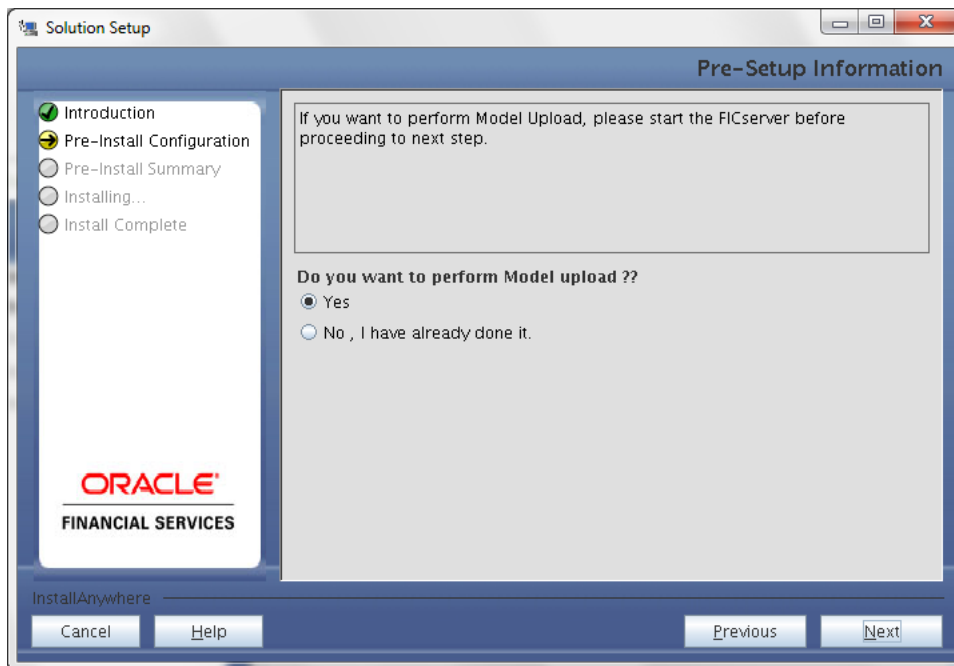
Step – 10

In the following screen choose the **Prepackaged Datamodel** or the **Customized Datamodel** to be uploaded.

OFS Credit Risk Management Release 4.0.2.0.0, data model is packaged as part of the application installer and is installed as a part of the following steps, if required.

In the the following screen prompt opt for model upload process through the installer.

NOTE:

If **Yes** is selected for Data model upload then copy the .xml to a specific folder and rename the file.

Clicking **No** implies that the OFS Credit Risk Management is already uploaded. To proceed with the application model upload process as part of the installation click **Yes**. Click **Next** to proceed.

If you select **No** go to **Step 12** or else go to **Step 10**.

Step – 11

In the following screen prompt choose whether the released version of the datamodel or the customized datamodel is to be uploaded.
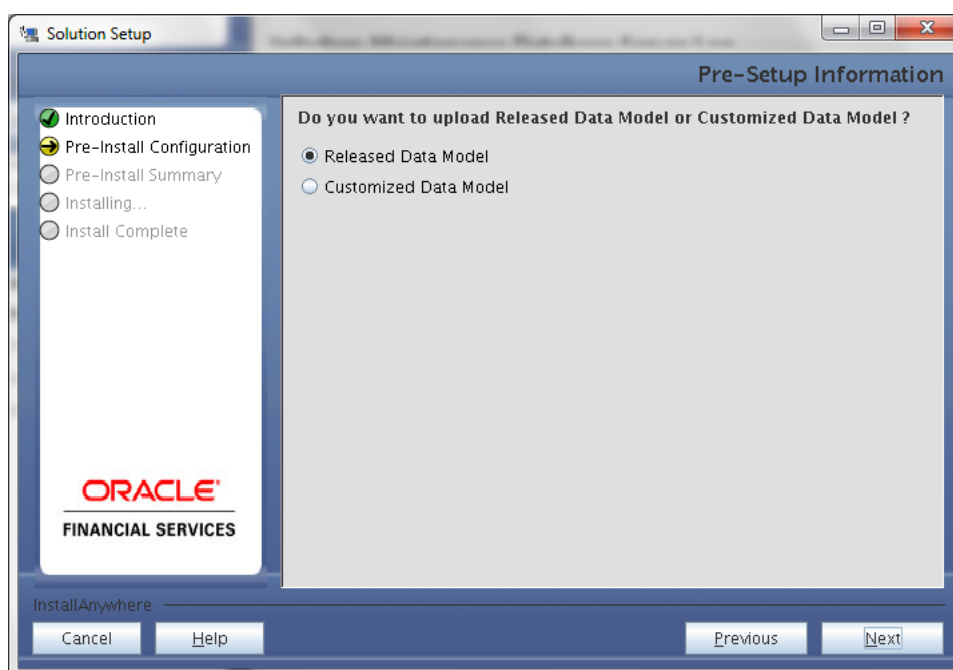
If **Released Data Model** option is selected, then the installer uploads the Oracle Financial Services Retail Portfolio Risk Model and Pooling Release 3.4.1.0.0, data model.

If **Customized Data Model** option is selected, then the installer allows you to select the data model. Choose the desired option.

If **Released Data Model** is selected go to **Step 12** or else go to **Step 11**.

Click **Next** to proceed.

Step – 12

If the **Customized Data Model** is selected then the following screen is displayed where you can select the customized data model located in your machine.
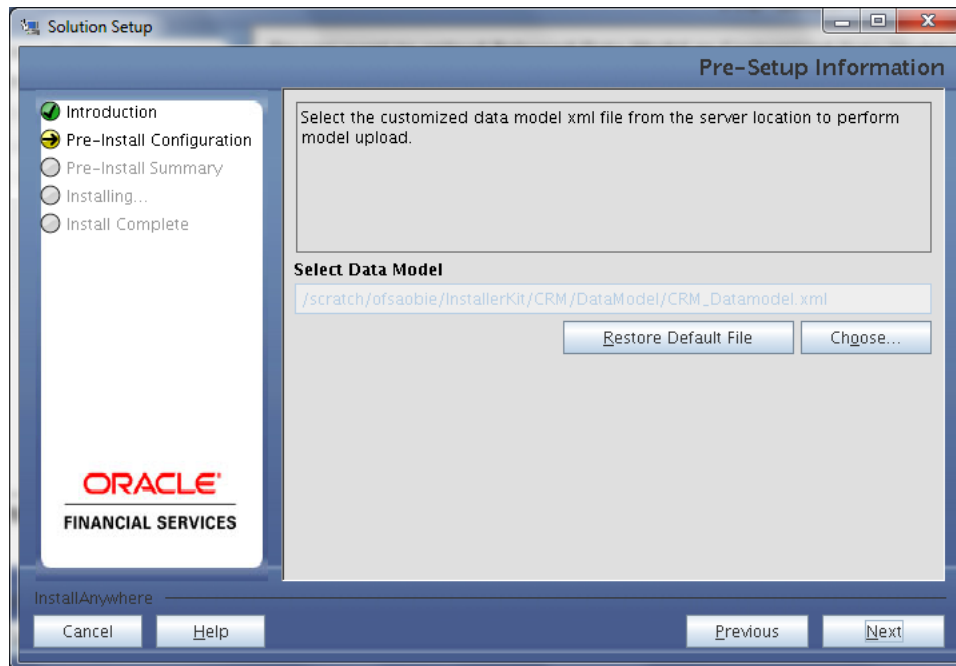
Pre – Setup information

Note:

- The data model .XML file should be available in the server. If the installation is being performed on an existing information domain, the data model selected in this screen should be merged with the data model that was previously uploaded in the information domain.

- If the installation is performed on a new information domain, data model that is either customized or merged with other data models can be selected in this screen prompt.

Step – 13

The following screen displays the summary of the uploaded data model:
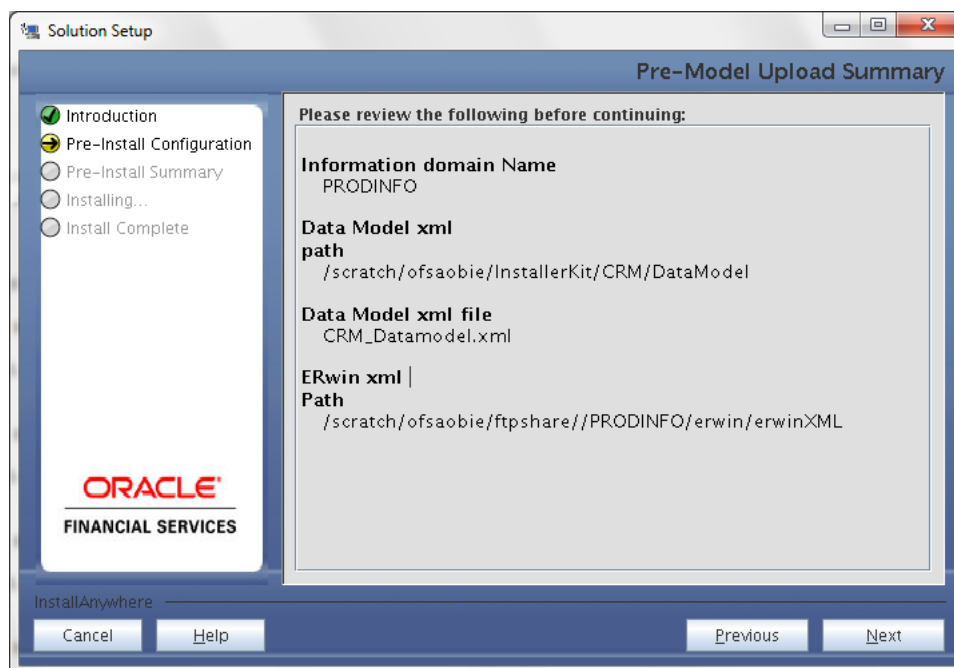
Pre – Model Upload Summary

1. Verify the details before proceeding to the next step.

2. Click **Next** to proceed with model upload.

The time taken to upload the data model is dependent on the size of the data model and available physical memory in the environment. You cannot proceed further without the successful completion of the data model upload. Also, this step cannot be rolled back.

If the model upload fails, then a pop-up message with relevant errors and the log file path is displayed. Review the errors and take relevant action. After resolution, navigate to the previous screen and proceed with the steps mentioned above.

Note:

Some of the common errors are:

- Insufficient heap memory on the client machine.

  Possible reason/resolution:

  The java memory settings mentioned in .profile should be increased.
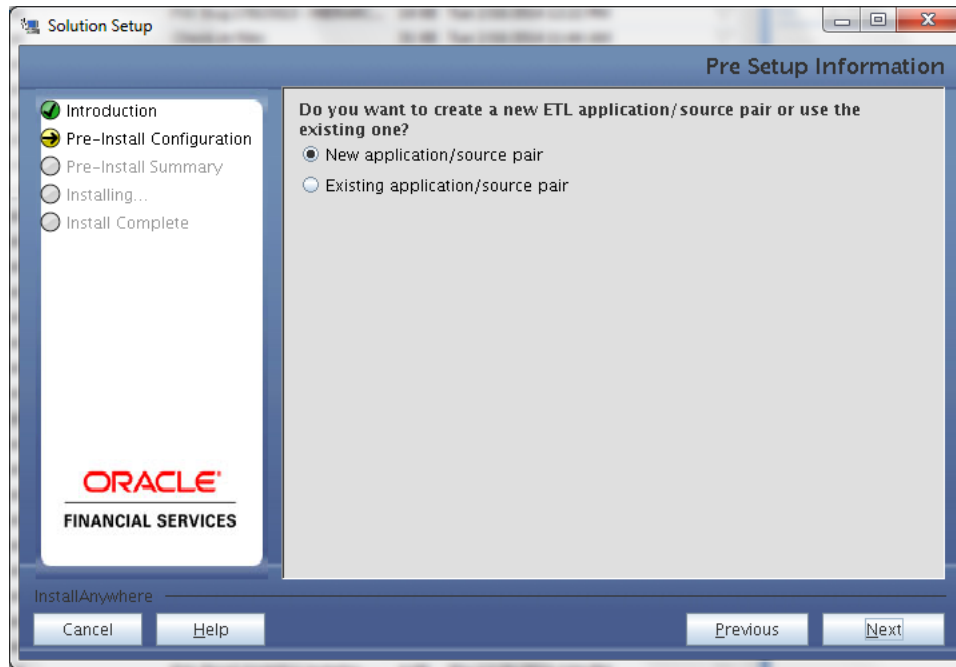
- Error while getting the Erwin File path.

  Possible reason/resolution:

  Restart the FICServer.

Step 14

In the following screen select New application/source pair or select Existing application/source pair. If the option Existing application/source pair is selected then goto step 14-ii or else goto step

14-i.

Step 14-i

In the next screen specify all the details required for application and source creation. Click **Next** to proceed. Clicking **Next** creates application and source within OFSAAI. Source model will also be generated. This process might take some time to process depending on the number of entities or attributes in the atomic schema. This step cannot be rolled back.
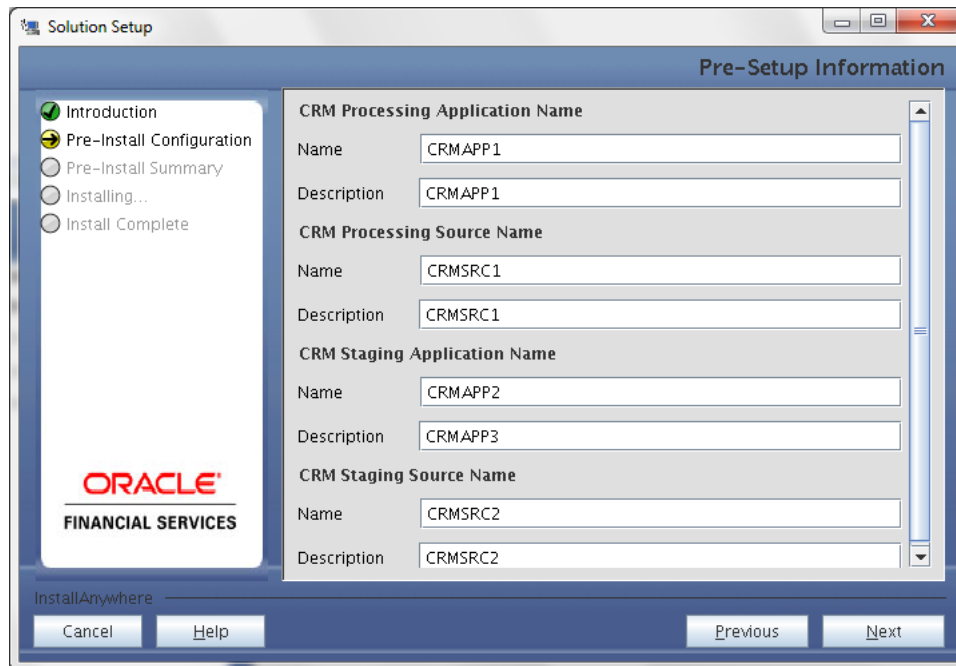
Note:

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

Step 14-ii

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

Choose the desired ETL application/source pair into which ETL definitions should be deployed.
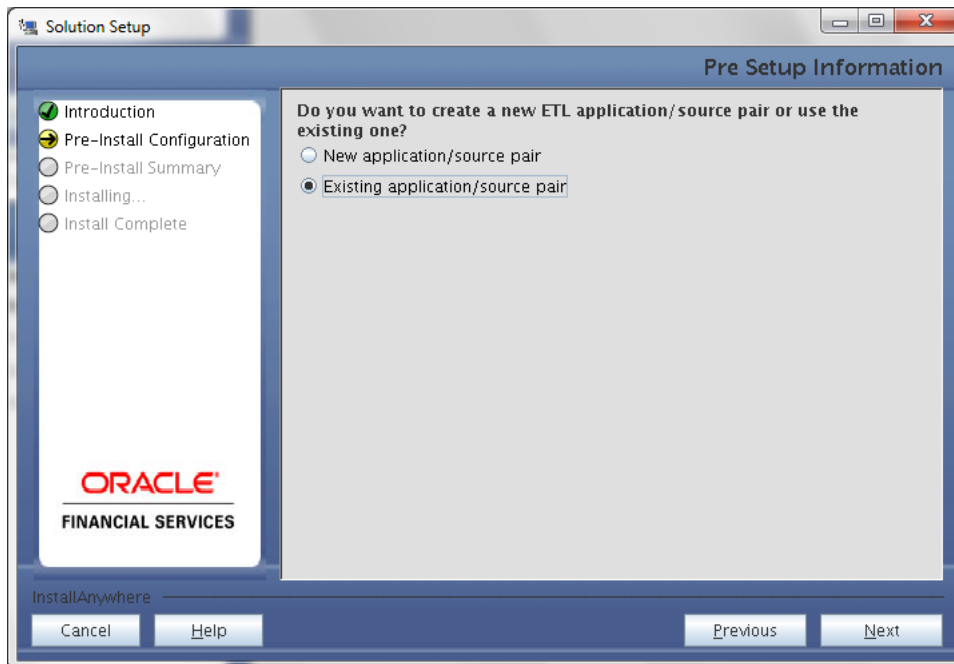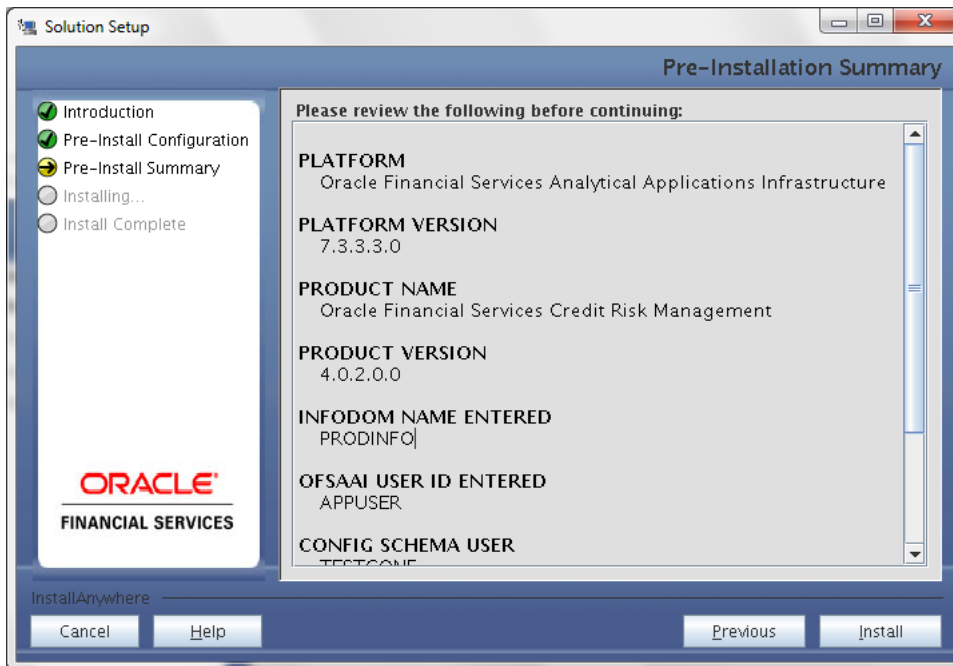
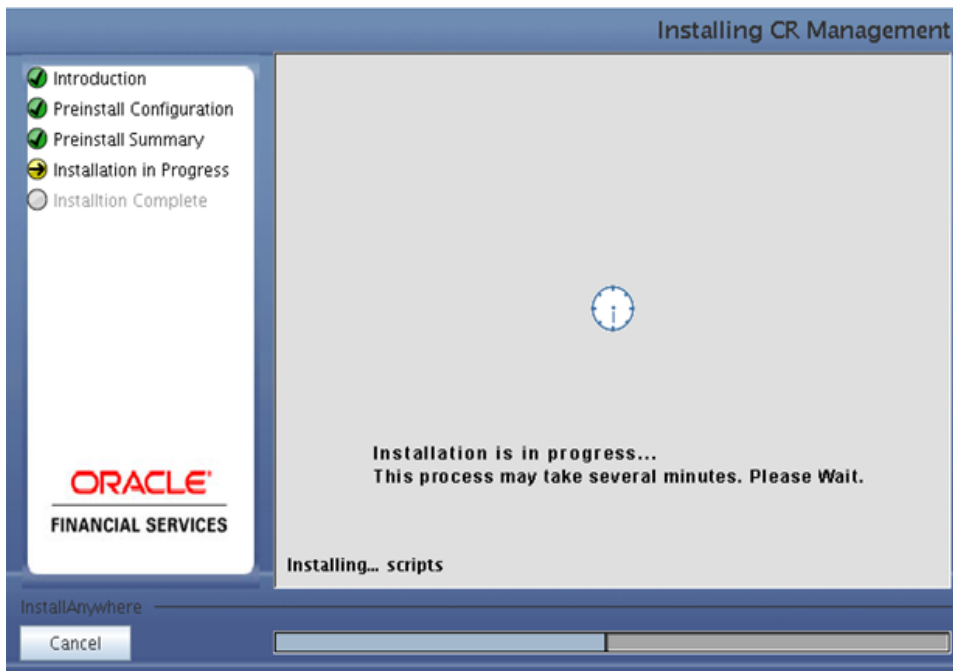Click **Next** to process.
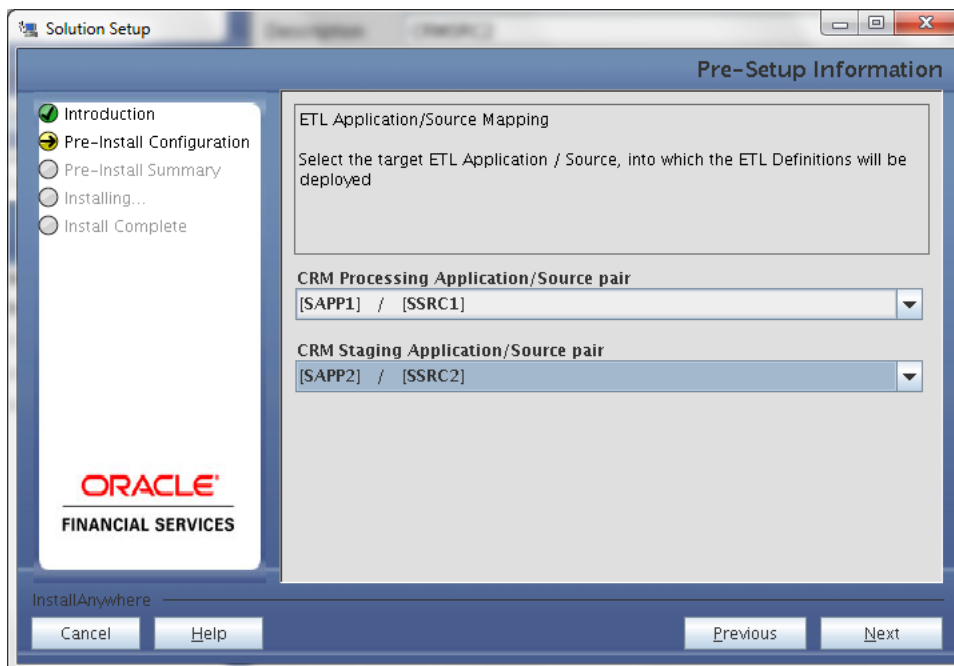
Step 15

This screen displays all a preinstallation summary. Verify all details and click **Install** to proceed.

Pre – Install Summary

Step 16

This screen prompt displays the installation process. To proceed further, wait for the installation to be completed.

Installation is in progress

Step 17

The following screen displays the completion of installation of the OFS Credit Risk Management Release 4.0.2.0.0 Setup. Click **Done** to exit.

Installation Complete

3.1.2   Machine B – Product Database Layer

Step 1

To begin with the Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 installation, execute **Setup.sh** with the parameter GUI (GUI Installation) or SILENT (for Silent installation).
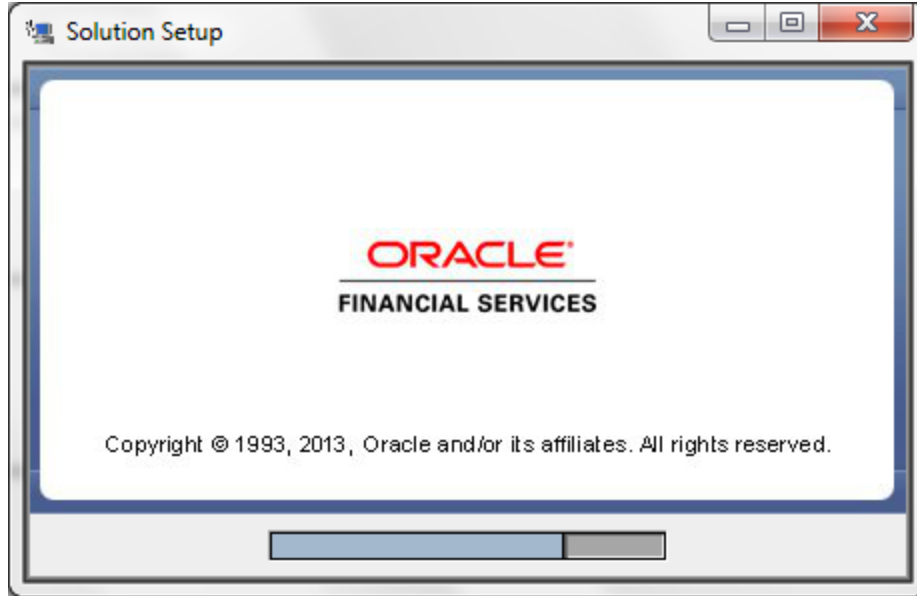
Installation Splash Screen

Repeat **Step 2 - Step 5** as mentioned in Machine A – Product Application Layer.

Step 6

Select the information domain from the drop down list present in the setup. Enter segment code and enter the application schema's TNS name in the following screen prompt.

Pre Setup Information Screen – Choose Layer to Install

Step 7

This screen summarizes the preinstallation details. Verify all the details and proceed.

Click **Install** to proceed.

Pre – Install Summary

Step 8

This screen prompt displays the installation process. Wait till the installation is complete.
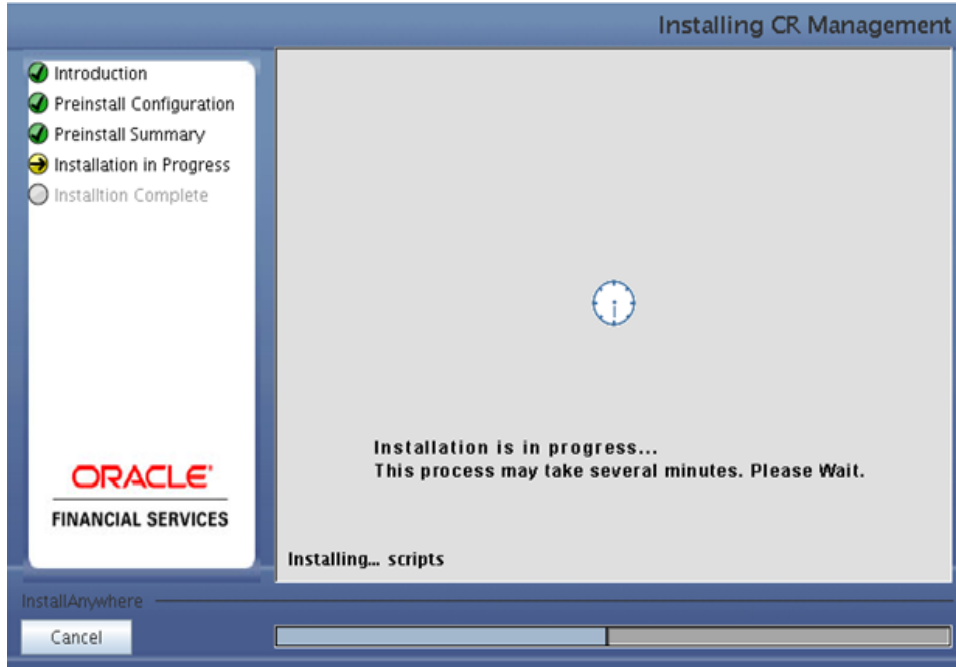
Installation is in progress
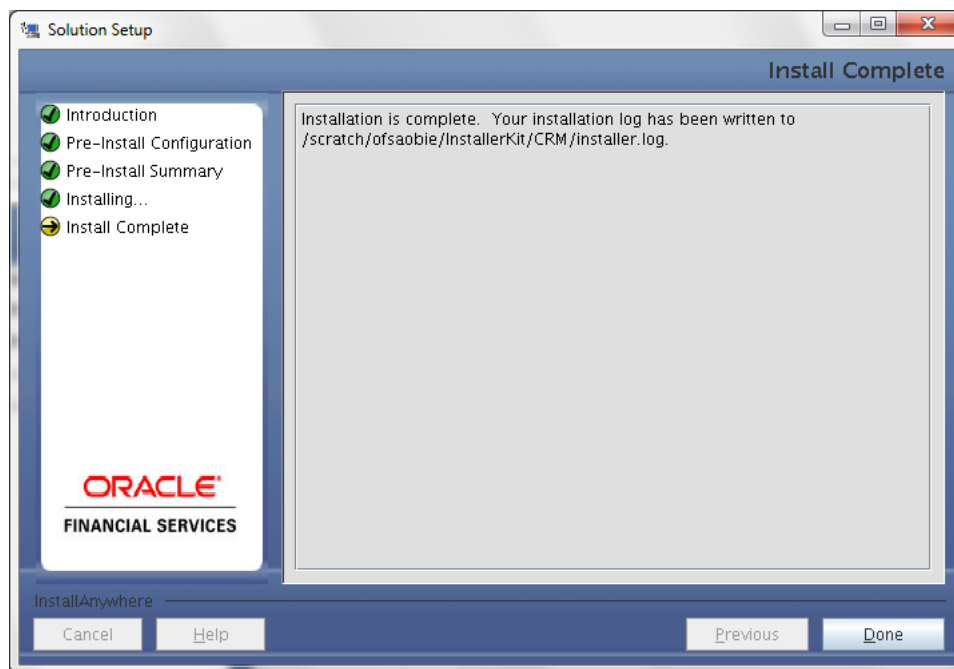
Step 9

The following screen prompt displays the completion of installation of the Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 setup.

Click **Done** to exit.

Installation Complete

3.1.3 Machine C – Product Web Layer

Step 1

To begin with the Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 installation, execute **Setup.sh** with the parameter GUI (GUI Installation) or SILENT (for Silent installation).
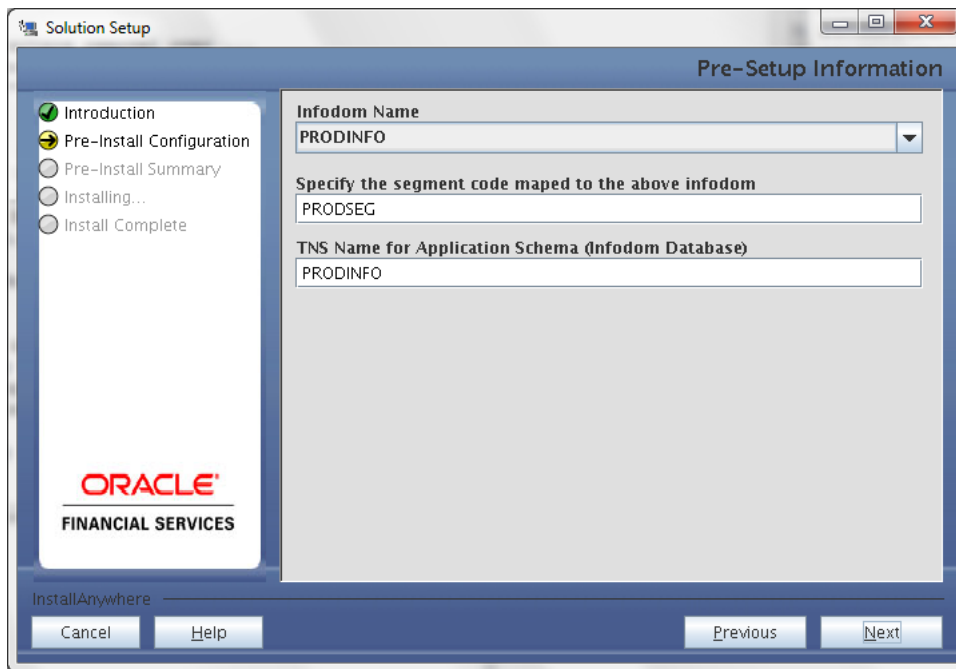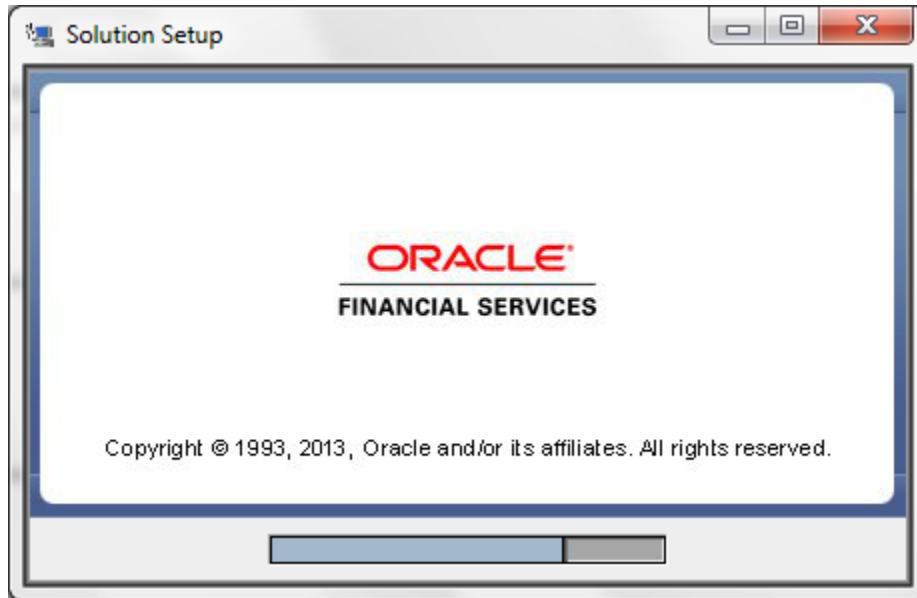

Installation Splash Screen

Repeat **Step 2 - Step 5** as mentioned in Machine A – Product Application Layer

Step 6

Select the Information Domain from list of Information Domains present in the setup, enter segment code and enter the application schema's TNS name in the following screen prompt.
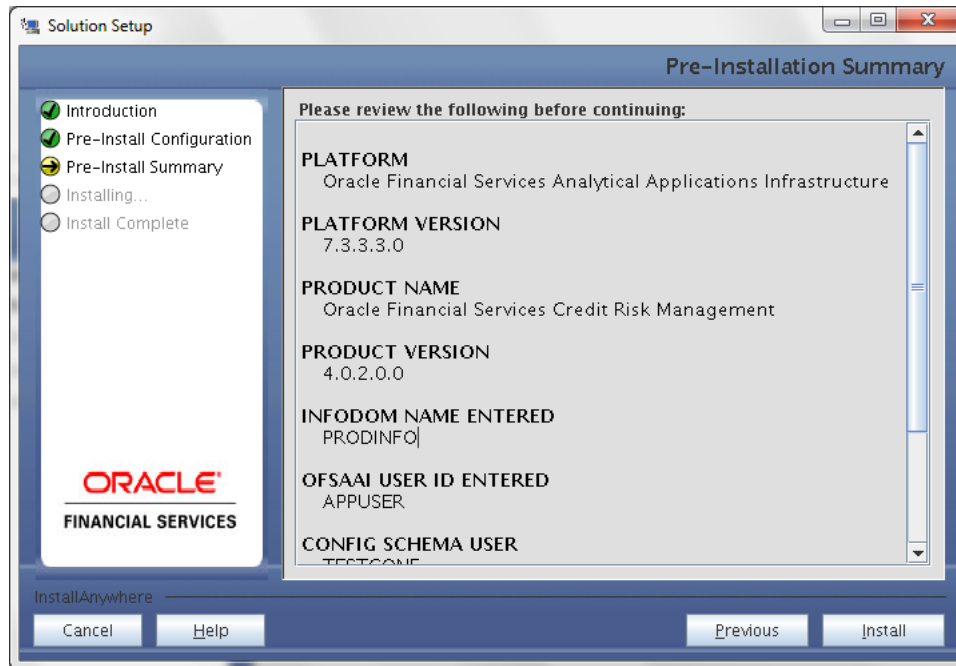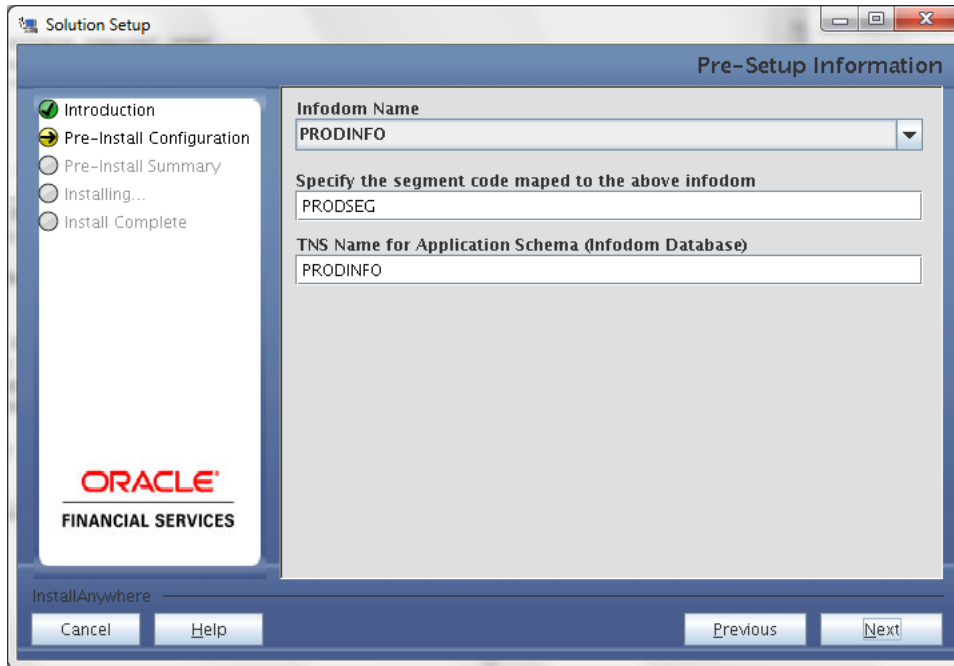
Pre Setup Information Screen – Choose Layer to Install

Step 7

This screen prompt summarizes the preinstallation details. Verify all the details and proceed.

Click **Install** to proceed.

Pre – Install Summary

Step 8

This screen prompt displays the installation process. Wait till the installation is complete.
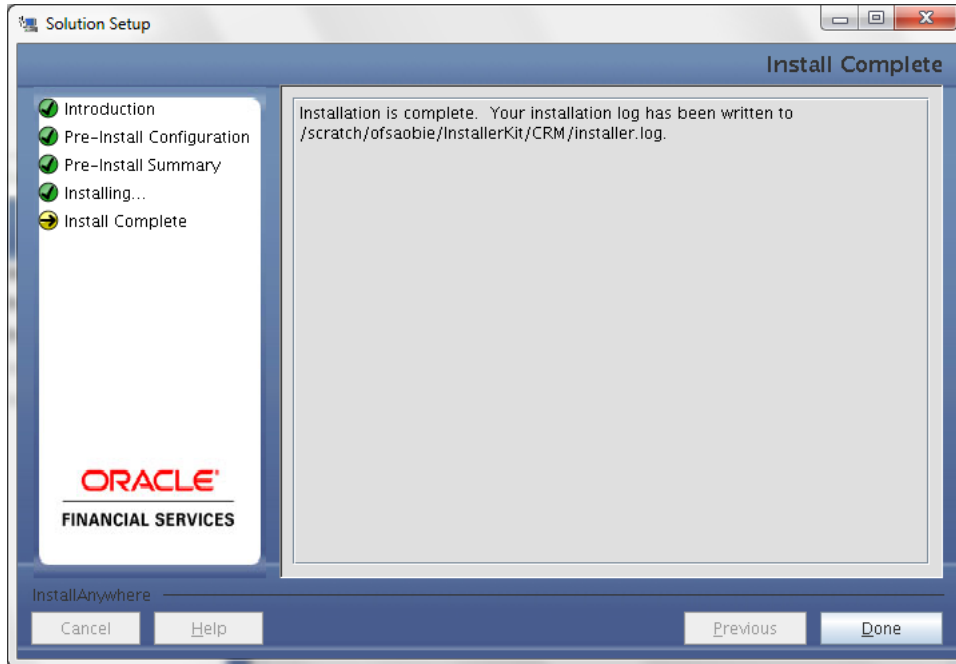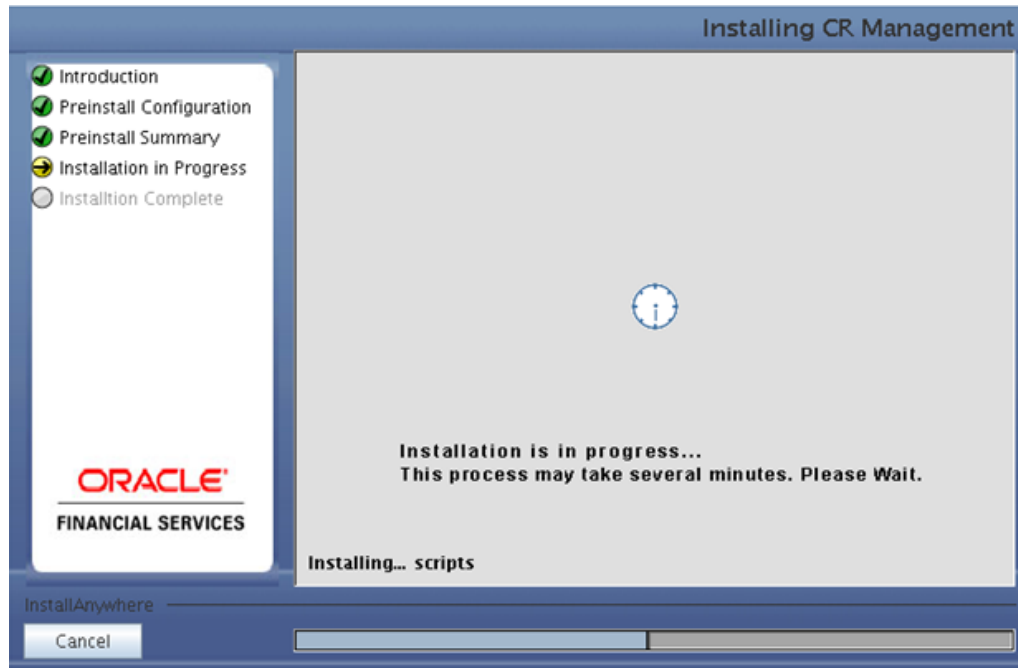

Installation is in progress

Step 9

The following screen prompt displays the completion of installation of the Oracle Financial Services Credit Risk Management, Release 4.0.2.0.0 setup.

Click **Done** to exit.
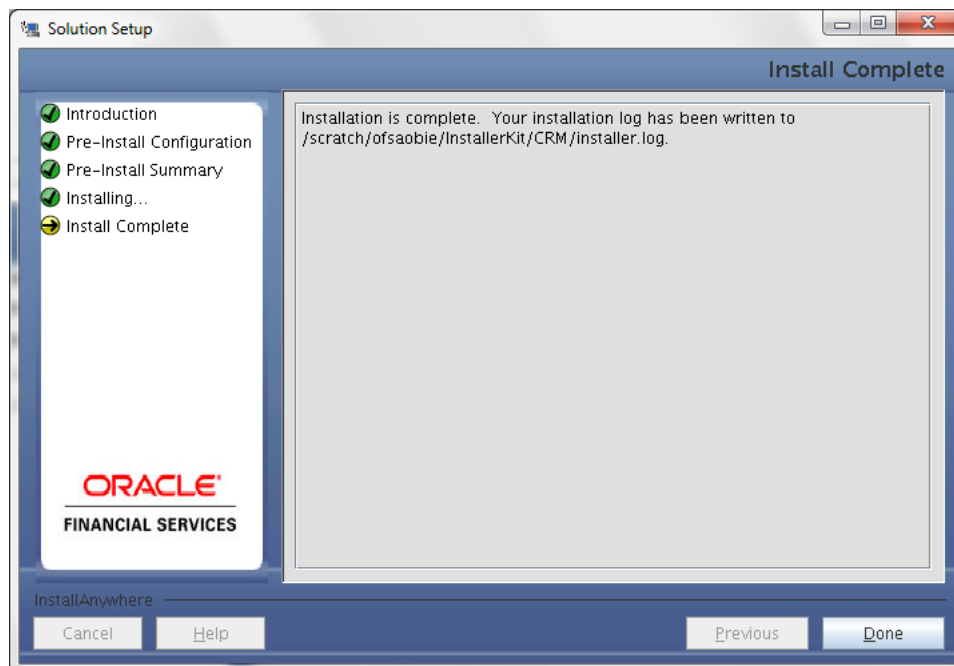
Installation Complete

3.2 OFS Credit Risk Management Release 4.0.2.0.0 Installation- Silent Mode

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

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:

  Setup.sh SILENT

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

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

SILENT.PROPS.xls

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3.3 Post Installation Activities

Once the installation of Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 Application is completed, refer to the following activities:

- The following tag should be added manually in web.xml if not already present in web.xml.

```
<resource-ref>
<description>DB Connection <Infodom_Name></description>
<res-ref-name>jdbc/<infodom_name></res-ref-name>
<res-type>javax.sql.DataSource</res-type>
<res-auth>Container</res-auth>
</resource-ref>
```

- Create a connection pool in the Information Domain. *For more information refer to the OFSAAI 7.3.0.0.0 Installation manual.*

- Map the Roles to the User Group in the Front End manually.

- Map the domain segment names to a User Group manually. To do so, click **Security Management** from the LHS of the OFSAAI front end, then click **User Group Domain Map** option and map the required Information Domain – segment to the User Group.

- Map the sandbox segment names

- Check for `export` **LDR_CNTRL=MAXDATA=0x40000000** in the .profile. If already commented as per pre-installation activity then uncomment it.

- Create and deploy the war/er file into webserver. *For more information on deploying the war file refer to the OFSAAI 7.3.0.0.0 Installation manual.*

- Execute the following queries in Config Schema:

```
UPDATE   METADATA_MASTER   SET   CREATION_DT   =   SYSDATE   WHERE
METADATA_VERSION=0 AND DSN_ID = '<<INFODOM>>' AND CREATION_DT IS
NULL

/

COMMIT

/
```

Note: Replace <<INFODOM>> with the infodom that was created.

- If CRM 4.0.2.0.0 solution upgrade is installed, ensure the following changes are made in the CustomLHSMenu.xml.

Once the installation is completed successfully, navigate to the following path *<OFSAAI Installation Directory>* **/ficapp/common/FICServer/conf.**

Access the CustomLHSMenu.xml file for editing.

Remove the following lines of code and save the file.

```
<MENUITEM ID="CRM" PROTECTED="false" LINK_TEXT="Risk Applications"
URL="" LINK_IMAGE="images/rev_menu_icon_bsp.gif" TARGET="right"
```

```
              TOOLTIP_TEXT="Risk Applications" 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" HELP_LINK=""

              HELP_IMAGE="images/rev_menu_help.gif" FUNCTION_LIST=""
              SUPPORTED_OLAP="" SUPPORTED_RDB="" COMPONENT_LIST="">

              <SUB_MENU>

              <MENUITEM ID="CRMLHS" PROTECTED="true" LINK_TEXT="Credit Risk
              Management" URL="crm/index.jsp" LINK_IMAGE="" TARGET="_blank"
              TOOLTIP_TEXT="Credit Risk Management" FGCOLOR="#000000"

              FONT_FACE="Arial,Helvetica" FONT_STYLE="normal" FONT_SIZE="12"
              BGIMAGE="images/rev_menu_level3.gif" CLOSE_ON_LOGOUT="true"
              ALLOWS_DUPLICATE="false" HELP_LINK="" HELP_IMAGE=""

              FUNCTION_LIST="VIEWRUNDET+MODRUNPRM+EXEREQRUN" SUPPORTED_OLAP=""
              SUPPORTED_RDB="" COMPONENT_LIST="">

              <PARAMETERS>

              <PARAM NAME="userId" VALUE="%{userid}" />

              <PARAM NAME="infodom" VALUE="%{dsn}" />

              </PARAMETERS>

              </MENUITEM>

              </SUB_MENU>

              </MENUITEM>

              <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>
```

- Start all OFSAAI Servers.

- Copy the dynamic Services.xml, Dynamic services.dtd, Lookupservices.xml and lookup.dtd from the $FIC_HOME/conf of app layer to ficdb/conf of the db layer.

- Start the web server after deployment.

- Refer *Starting OFSAAI Servers* in the *OFSAAI 7.3.0.0.0 Installation Guide* for assistance in starting the servers.

- If you are installing OFS Credit Risk management v4.0.2.0.0 on OFSAAI 7.3.3.0.0 or higher versions, you need to run the MLS utility. See the Multiple Language Support (MLS) Utility section in OFSAAI Administration Guide.

- Re-save all the Hierarchies and the other metadata in OFSAAI.

- The below scripts has to be enabled (only for upgrade activity):

```
ALTER TABLE PR2_RULE_MAP ENABLE CONSTRAINT FK_PR2_RULE_MAP_1
/
ALTER TABLE PR2_RULE_OBJECT ENABLE CONSTRAINT FK_PR2_RULE_OBJECT_1
/
ALTER TABLE PR2_RULE_QUERY ENABLE CONSTRAINT FK_PR2_RULE_QUERY_1
/
ALTER TABLE PR2_RUN_OBJECT ENABLE CONSTRAINT FK_PR2_RUN_OBJECT_1
/
ALTER TABLE PR2_RUN_OBJECT_PARAMETER ENABLE CONSTRAINT
FK_PR2_RUN_OBJECT_PARAMETER_1
/
ALTER TABLE PR2_RUN_OBJECT_MEMBER ENABLE CONSTRAINT
FK_PR2_RUN_OBJECT_MEMBER_1
/
ALTER TABLE PR2_RUN_MAP ENABLE CONSTRAINT
FK_PR2_RUN_MAP_1
/
ALTER TABLE PR2_RUN_EXECUTION_B ENABLE CONSTRAINT
FK_PR2_RUN_EXECUTION_B_1
/
```

- Recompile all the functions, procedures and views.

Note:

Ignore the following errors in the log:

- o *ORA-00942: table or view does not exist*

- o *ORA-00001: unique constraint (ERMATOM.PK_REV_BIHIER) violated*

- o *ORA-00955 name is already used by an existing object*

The Oracle Financial Services Credit Risk Management Release 4.0.2.0.0 Application is now ready to be used.

If you encounter any problems during setup, please contact OFSAA Support at Oracle Support.

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4. **OFS Credit Risk Management v4.0.2.0.0 Analytics Configuration**

Introduction

Assumptions

The assumptions to be considered before configuring OFS Credit Risk Management Analytics are as follows:

- OBIEE 11.1.1.7.1 Server for the respective operating system is installed.
- Administrator knows how to start/shutdown the OBIEE servers namely:
    - Weblogic Server
    - Oracle BI Server
    - Oracle BI Presentation Server
    - Oracle BI Java Host
- Administrator knows the OBIEE installation path.

Prerequisites

The following requirements are to be met before configuring OFS Credit Risk Management Analytics:

- Create a backup of the following OBIEE folders (*this is for an existing installation only and is not required for a new installation)*:
    - *<Installation Path>\middleware\instances\instance1\bifoundation*
        - *OracleBIServerComponent\coreapplication_obis1\repository*
    - *<Installation Path>middleware\instances\instance1\bifoundation*
        - *OracleBIPresentationServicesComponent\coreapplication_obips1\catalog\ <new folder created as part of Installation steps>*
- Server details, that is, the URL of OBIEE should be kept handy.
- Copy the following files from the release kit to the local machine:
    - *\Customer Deliverables\Answers & Dashboards*OFS Credit Risk Management 4; this has the archive for dashboard and Answer (report) related files. Do not unzip this file, as this file is not a zip file.
    - *\Customer Deliverables\OBIEE Repository*OFS Credit Risk Management 4 - Repository.zip; this has the OFS Credit Risk Management 4.rpd file. Unzip this file in the local machine.
    - *\Customer Deliverables\Dashboard Configuration\CreateAppRoles.py* and *\Customer Deliverables\Dashboard Configuration\CRM.xml;* these are the application roles (*CreateAppRoles.py*) and write back (*CRM.xml*) files that needs to be deployed after OBIEE installation.

Installation Steps

Server Configuration

For each release refer to the following steps for server configuration:

a. Stop the BI servers.

b. Add the tnsnames.ora file in the following folder *"<Installation Path>middleware \Oracle_BI1\network\admin".* The tnsnames.ora file should contain the data-source connection details used in the connection pool of the RPD.

c. Log on to Oracle Enterprise Manager.

    i. Navigate to the Business Intelligence menu located on the left hand side of the screen and select Core Application.

    ii. Navigate to Deployment located on the last tab.

    iii. Click Lock and Edit Configuration.

    iv. Navigate to the section Upload BI Repository.

    v. Browse and select the repository.

    vi. Enter the repository password and confirm the same. The repository password is "Password123".

    vii. Navigate to BI Presentation Catalog section.

    viii. Edit the catalog path and delete SampleAppLite (only in case of first time installation) at the end of the catalog path section and enter **OFS Credit Risk Management 4** as the name of the new catalog folder. Make sure that the folder path is *<OBIEE Installation Path>middleware\instances\instance1\bifoundation*

    OracleBIPresentationServicesComponent\coreapplication_obips1\catalog\ "

    ix. Click Apply.

    x. Click Activate Changes

    xi. Click the Overview tab

    xii. Click Restart.

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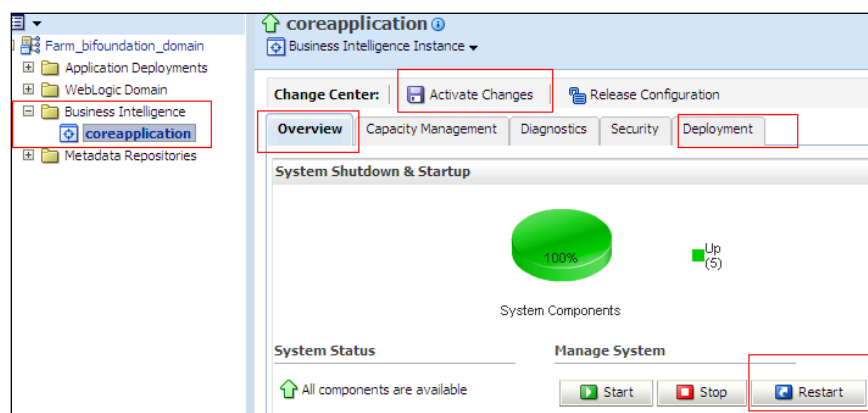
xiii. Confirm to restart all services.

xiv. Edit the NQSConfig.INI file, found at *<Installation Path>\instances\instance1\config\OracleBIServerComponent\coreapplicati on_obis1* to reset the FMW_UPDATE_ROLE_AND_USER_REF_GUIDS = NO to YES

xv. Add the tag <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs> present in <Installation Path>\instances\instance1\config\OracleBIPresentationServicesCompone nt in the instanceconfig.xml and restart the services.

xvi. Check if all the servers are up and running.

xvii. Edit the NQSConfig.INI file, found at *<Installation Path>\instances\instance1\config\OracleBIServerComponent\coreapplicati on_obis1* to reset the FMW_UPDATE_ROLE_AND_USER_REF_GUIDS = YES to NO and update.
Set EVALUATE_SUPPORT_LEVEL=2 from EVALUATE_SUPPORT_LEVEL=0 and save.

xviii. Remove the tag *<UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs>* found at *<Installation Path>\instances\instance1\config\OracleBIPresentationServicesCompone nt* in the instanceconfig.xml and restart the services.

xix. Disable the cache (cache can be enabled once the setup is moved to the production mode and on the basis of bank's requirements).To disable the cache; click the Capacity Management tab in the Oracle Enterprise Manager. Select Performance tab within it. Click Lock and Edit Configuration. Un-check the option Cache enabled. Click Activate Changes. Restart the servers to activate changes. Refer to the following image:
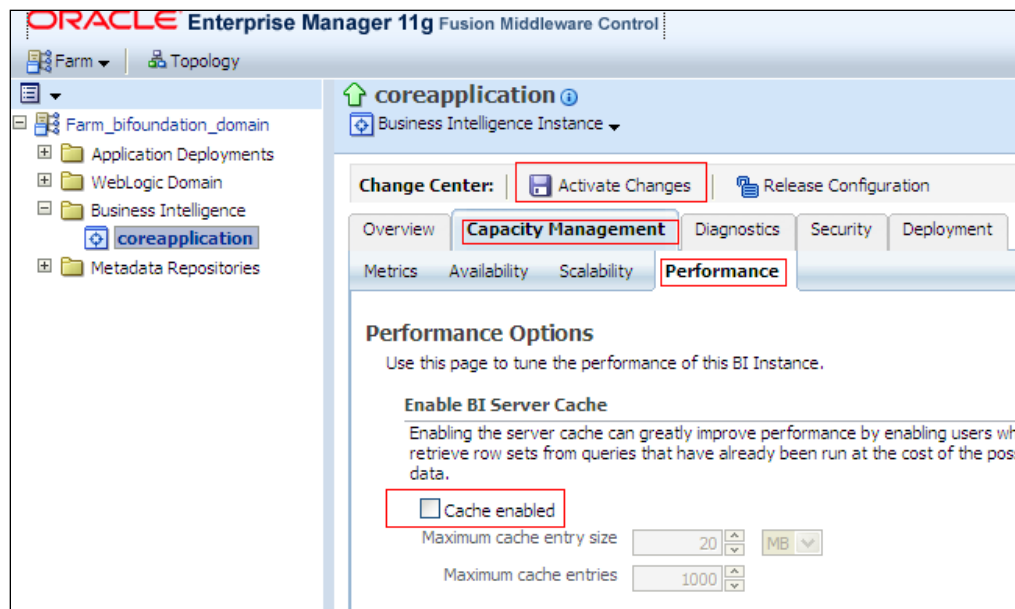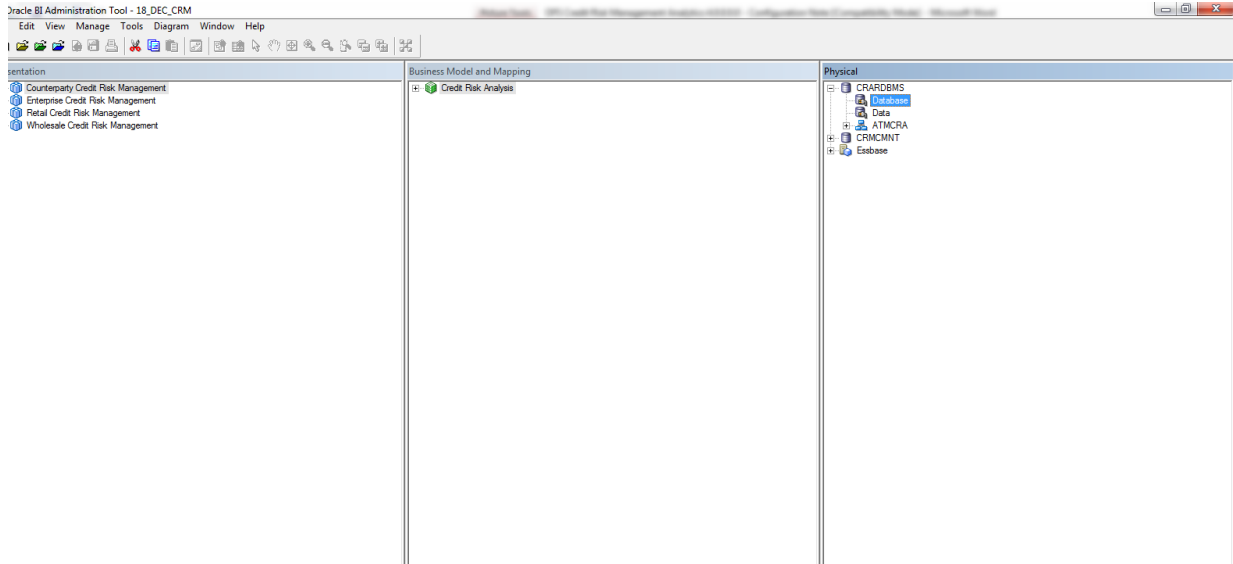
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d. Open the RPD by clicking Start Menu > All Programs > Oracle Business Intelligence > BI Administration.
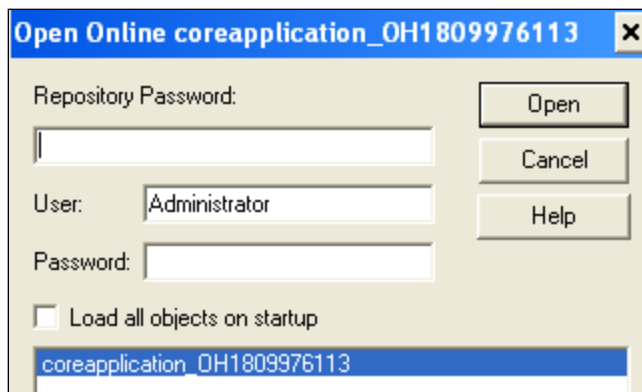
e. Provide the User as weblogic and the Password provided at the time of installing OBI 11g and the Repository Password as "Password123"

f. Double click "Database" in the physical layer of the RPD as shown in the following diagram:

g. Change data source name, user name and password to the Oracle TNS Name, database schema name and password respectively, as shown in the diagram below.

Note: If Oracle TNS Name is entered in Data Source Name, then TNS details must be also present under file - *<Installation Path>\Oracle_BI1\network\admin\tnsnames.ora.* Services must be restarted after addition of TNS details in the above mentioned path.
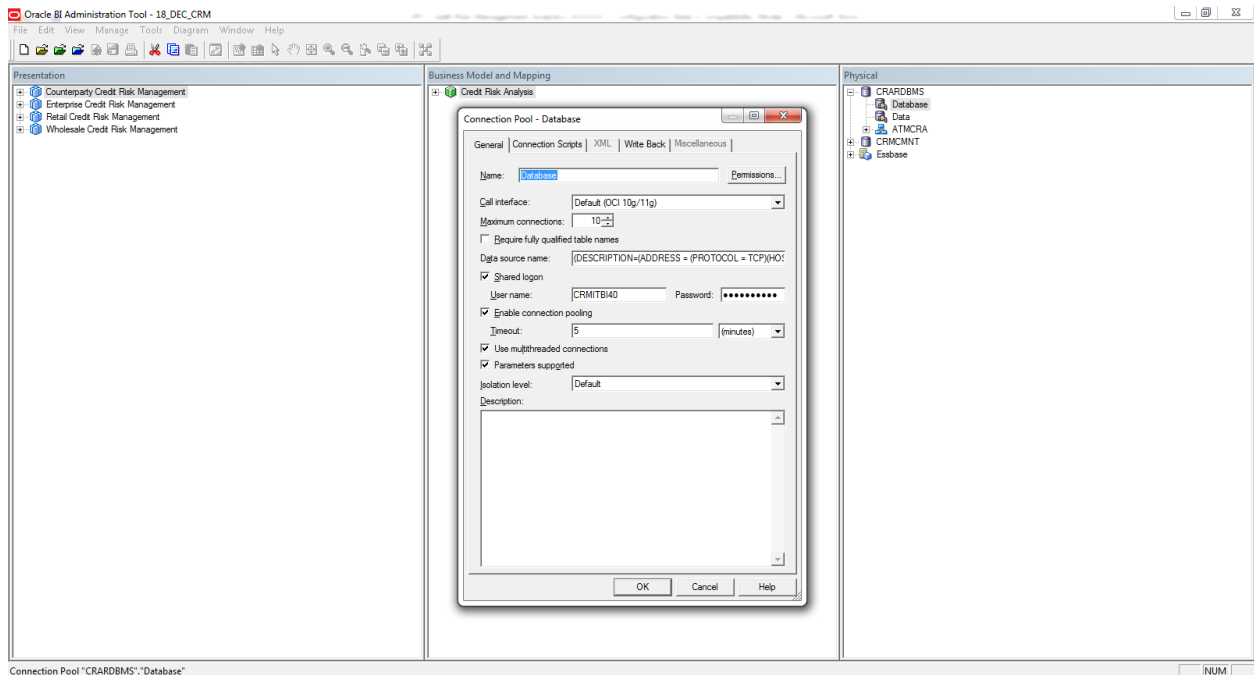
    h.   Similarly, change the details for 'Data'.

    i.   Save RPD and close.

    j.   Create a folder named **OFS Credit Risk Management 4** (if not created) in the following location *"<OBIEE Installation Path>middleware\instances\instance1\bifoundation*

    OracleBIPresentationServicesComponent\coreapplication_obips1\catalog\" (**only in case of first time installation**)

    k.   Start the BI services (if not started).

Dashboard/Answer Reports

To configure Dashboard or Answer reports from any client machine that is, windows machine, refer to the following steps:

    a.   Start the BI services (if not already started):

    b.   Start OBIEE Catalog Manager *(Start → Programs → Oracle Business Intelligence → Catalog Manager.*

    c.   Select *Open Catalog* from the File menu.

    d.   Select the option *Online* for Type.

    e.   Type the link for presentation services that is, Oracle Interactive Dashboard link. For example: *(http://URL:<port_number>/analytics/saw.dll)*

    f.   Enter the Administrator User Id and Password, and click OK.

    g.   Click the Shared Folder in the left hand pane.

    h.   Select the Un-archive option from File Menu.

    i.   Select the archive file *'OFS Credit Risk Management 4.0.2.0.0'* (sent as release), copied onto the local machine as part of introduction pre-requisite step. Click OK.

Post-installation Steps

Dashboard Verification Steps

Refer to the following steps to verify the Dashboard:

    a.   Log into Analytics and select Enterprise Credit Risk Dashboard. Verify whether the screen looks the same as the following figure:
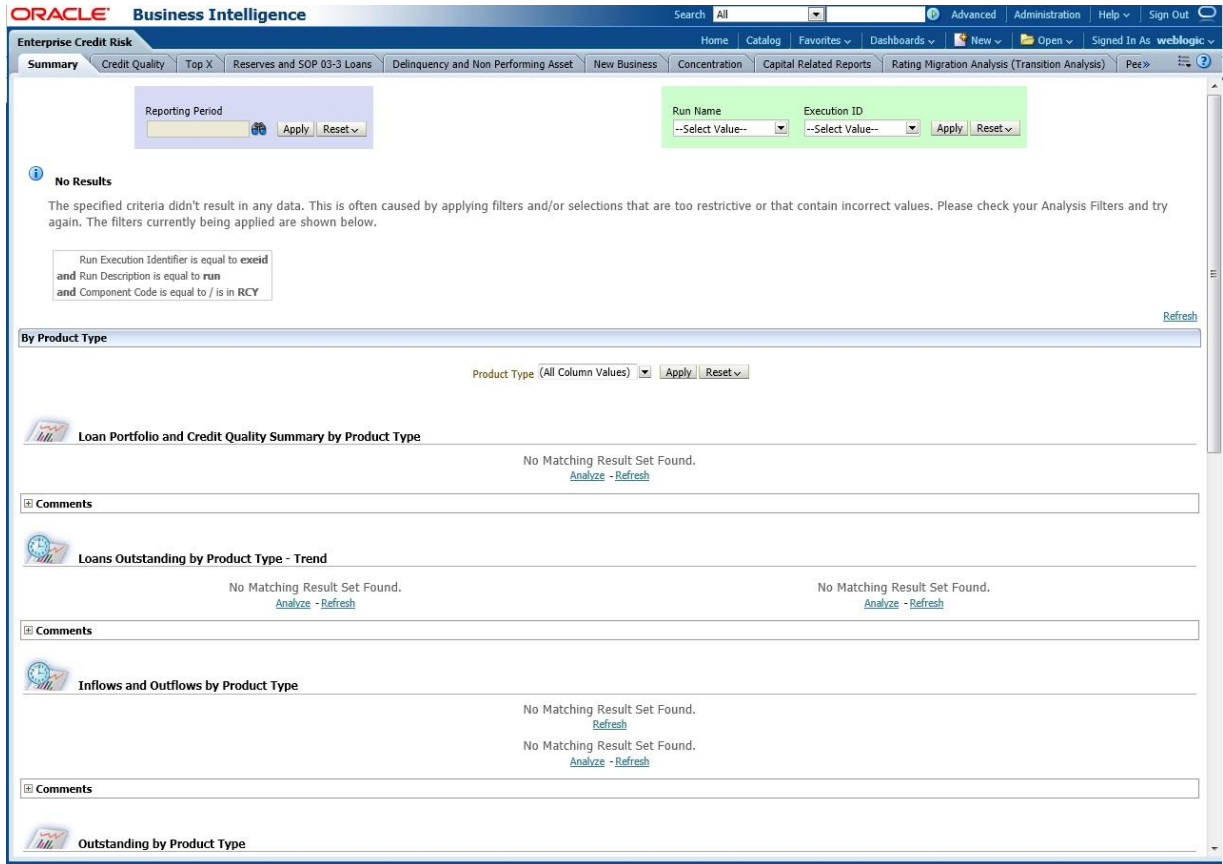
b. Click each dashboard link and check if all the links are visible.

c. Open the RPD and check if the RPD can be accessed online with the
    Administrator user.

Application Roles

Steps to create Application Roles for OFS Credit Risk Management Release 4.0.2.0.0 are as
follows:

a. Open a command prompt, navigate to the folder *"<OBIEE Installation
    Path>/oracle_common/common/bin/"* and execute the following command

CreateAppRoles.py

wlst <file path>/CreateAppRoles.py username password t3://localhost:7001

For Example: *wlst d:\CRM_XXX\CreateAppRoles.py username password
t3://localhost:7001*

Configuration of Comments Module

Steps to implement the Comments Module for OFS Credit Risk Management 4.0.2.0.0 are as
follows:

a. Add the tag *<LightWriteback>true</LightWriteback>* in between <ServerInstance> </ServerInstance> tag found at *<Obiee_Installation_Path>\instances\instance1\config\OracleBIPresentationServicesCom ponent\coreapplication_obips1\instanceconfig.xml.*

Eg:

<ServerInstance>

<LightWriteback>true</LightWriteback>

……………………..

………………………

</ServerInstance>

b. Put the CRM.xml file inside the below mentioned folder. If *customMessages* folder is not present, create the folder :

- *<Obiee_Installation_Path>\instances\instance1\bifoundation\OracleBIPresentation ServicesComponent\coreapplication_obips1\analyticsRes\customMessages.*
- *<Obiee_Installation_Path>\instances\instance1\bifoundation\OracleBIPresentation ServicesComponent\coreapplication_obips1\analyticsRes\WEB- INF\customMessages*

CRM.xml

c. Restart OBIEE Server.
d. Login to OBIEE Analytics (http://localhost:7001/analytics use the login you created in OBIEE installation to log in).
e. Navigate to Administration right top corner.
f. Click on Manage Privileges and scroll down to Writeback.

Grant 'Writeback to Database' privilege to Authenticated User and BI Administrator Role.

Installation Manual
May 2014
Oracle Financial Services Credit Risk Managemenet V4.0.2.0.0

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