

Installation Manual  
Oracle Financial Services Enterprise Stress Testing and  
Capital Planning Analytics  
Version 2.0  
April 2014



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## Document Control

Version Number	Revision Date	Changes Done
Version 2.0	Revised on March 2014	Document contents have been categorized to appropriate sections and structured considering all the 2.0 enhancements.
Created and Edited by: Karthick Dayananda and Sindhu K K	Reviewed By: Usharani Shetty	Approved by : Kallol Das

### Executive Summary

The document consists of all the installation, Pre and Post configuration procedures which have been structured considering all the 2.0.0.0.0 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](#).

## Table of Contents

<b>1. ABOUT THIS MANUAL .....</b>	<b>2</b>
1.1 ORACLE FINANCIAL SERVICES ANALYTICAL APPLICATIONS INFRASTRUCTURE OVERVIEW .....	2
1.2 ANALYTICAL APPLICATIONS OVERVIEW .....	2
1.3 SCOPE .....	2
1.4 ORGANIZATION OF THE MANUAL .....	2
1.5 CONVENTIONS USED IN THIS MANUAL .....	3
<b>2. PRE-INSTALLATION CONFIGURATION .....</b>	<b>4</b>
2.1 PREREQUISITES .....	4
2.2 ENVIRONMENT .....	4
2.3 GENERIC SOFTWARE .....	5
2.4 PRE-INSTALLATION ACTIVITIES .....	6
<b>3. INSTALLING THE ANALYTICAL APPLICATION .....</b>	<b>8</b>
3.1 OFS ENTERPRISE STRESS TESTING AND CAPITAL PLANNING ANALYTICS V 2.0 PRODUCT INSTALLATION ON OFSAAI	
7.3.3.3.0 .....	8
<i>For Silent Installation, refer to section on "Silent Installation".</i>	
3.1.1. Machine A – Product App Layer ...	8
3.1.1.1. Machine A – Product App Layer .....	9
3.1.1.2. Machine B – Product Database Layer .....	23
3.2 OFS ENTERPRISE STRESS TESTING AND CAPITAL PLANNING ANALYTICS V 2.0 INSTALLATION- SILENT MODE .....	29
3.3 POST INSTALLATION ACTIVITIES .....	29
3.3.1 OFSAAI Server Memory Configuration .....	29
<b>4. OFS ENTERPRISE STRESS TESTING AND CAPITAL PLANNING ANALYTICS CONFIGURATION .....</b>	<b>31</b>
4.1 PRELIMINARY INSTALLATION OF SOFTWARE .....	31
4.2 MODIFY REPOSITORY CONNECTION POOL SETTINGS .....	31
4.3 STARTING NODE MANAGER AND WEBLOGIC SERVERS .....	32
4.4 DEPLOYMENT .....	35
4.5 STARTING THE ANALYTICS SERVICES .....	39
4.6 CREATING USERS AND GROUP AND MAPPING IT TO RISK MANAGER ROLE .....	40
4.7 TESTING THE ANALYTICS REPORTS .....	44

## 1. About this Manual

### 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

The Oracle Financial Services (OFS) Enterprise Stress Testing and Capital Planning Analytics (EST & CP) v 2.0 is a business intelligence application that provides a unified reporting environment to financial institutions that addresses their regulatory and internal reporting requirements around enterprise stress testing.

The OFS EST & CP v 2.0 is based upon a dedicated reporting mart built from the new Fusion Financial Services Data Model. It leverages several components of OBIEE technology including Dashboards, Answers. It also includes various Dashboards and Reports for the user to carryout various capital planning based analytics

### 1.3 Scope

This manual provides a step-wise instruction to install the Oracle Financial Services Enterprise Stress Testing and Capital Planning Analytics Product in an existing OFSAAI hosted in Oracle 11g R2 (11.2.0.2.0) environment or without Oracle Financial Services Analytical Applications Infrastructure.

### 1.4 Organization of the Manual

The Installation Manual is organized into the following chapters:

- Prerequisites section identifies the hardware and base software environment that is required for successful installation and functioning of Oracle Financial Services Enterprise Stress Testing and Capital Planning Analytics v 2.0.
- Installing the Application 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

the successful installation of the Oracle Financial Services Enterprise Stress Testing and Capital Planning Analytics v 2.0.

## 1.5 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:

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**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**.

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## 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](#)

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### NOTE

The OFS EST & CP v 2.0 installer download contains only the ERwin XML file that is required for uploading the model. This file is sufficient to install the v6.1.0.0.0 product. However, this XML file cannot be opened in 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 **18382926 - PLACEHOLDER BUG FOR ERWIN FILE UPLOAD FOR ESTBI 2.0 DATA MODEL.**

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### 2.1 Prerequisites

- Oracle Financial Services Analytical Applications Infrastructure version 7.3.3.3.0.
- Oracle Business Intelligence Enterprise Edition version 11.1.1.7.1 on any supported operating system, once installed must be configured.

### 2.2 Environment

Type	Description
OS	<ul style="list-style-type: none"> <li>• Red Hat Enterprise Linux Server release 5.5 (Tikanga) - 64 bit</li> <li>• Oracle Enterprise Linux Server release 5.5 (Carthage) - 64 bit</li> <li>• Red Hat Enterprise Linux Server release 5.3 (Tikanga) - 64 bit</li> <li>• Oracle Enterprise Linux Server release 5.3 (Carthage) - 64 bit</li> </ul>
Infrastructure Application Server	<ul style="list-style-type: none"> <li>• Oracle Client 11g R2 (11.2.0.2.0) - 64 bit</li> </ul>

Type	Description
	<ul style="list-style-type: none"> <li>• Sun JRE Standard Edition 1.6.0_25 - 64 bit</li> <li>• Sun JDK Standard Edition 1.6.0_25 - 64 bit</li> </ul>
<b>Infrastructure Database Server</b>	<ul style="list-style-type: none"> <li>• Oracle Database Server 11g Release 2 (11.2.0.2.0)-64 bit with or without RAC [Enterprise edition with partitioning capability]</li> <li>• Sun JRE Standard Edition 1.6.0_25 - 64 bit</li> <li>• Sun JDK Standard Edition 1.6.0_25 - 64 bit</li> </ul>
<b>Infrastructure Web Server</b>	<ul style="list-style-type: none"> <li>• Oracle 11g R2 (11.2.0.2.0) JDBC driver (Oracle thin driver)</li> <li>• Sun JRE Standard Edition 1.6.0_25 – 64 bit</li> <li>• Sun JDK Standard Edition 1.6.0_25 – 64 bit</li> <li>• Websphere 7.0.0.17 with IBM Runtime, Java Technology JDK 1.6.0 (SR9 FP1) - 64 bit</li> <li>• Apache Tomcat 7.0.39 pointing to JDK Standard Edition 1.6.0_25 – (64 bit)</li> </ul> <hr/> <p><b>Note:</b></p> <p>Any one of the above mentioned web servers (Websphere or Apache Tomcat) installation is required based on requirement.</p>
<b>Infrastructure Release version</b>	OFSAAI 7.3.3.3.0
<b>OBIEE Version</b>	11.1.1.7.1 - 64bit
<b>Patch details (if any)</b>	On the base OFSAAI platform version 7.3, apply the latest patch set to upgrade to release 7.3.3.3.0.

## 2.3 Generic Software

Type	Description
<b>Front End Access</b>	<p>Microsoft Internet Explorer 8/9</p> <p>Microsoft Office 2003/2007</p> <p>Client Machines – Windows XP SP3/Windows 7</p>

Type	Description
	<p>The screen resolutions supported are 1024*768 and 1280*1024</p> <p>Adobe Reader 8.0</p> <p>Java Plug-in 1.6.0_21</p> <hr/> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Ensure that Java Plug-in is enabled in the browser settings.</li> <li>• Enable caching of static content (static files, images, CSS, etc) for browser client.</li> <li>• Cookies should be disabled.</li> </ul>

## 2.4 Pre-installation Activities

The following is the Pre Installation checklist to ensure the readiness to start installing Oracle Financial Services ESTBI Product:

- OFSAAI v7.3.3.3.0 must be successfully installed on Oracle 11gR2 (RAC) (11.2.0.2.0).

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**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](#).

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- 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 atomic schema should be two distinct oracle database users.
- Oracle database User for Atomic schema should have the below grants
  - `grant create session to <ORACLE_USER>;`
  - `grant create SYNONYM to <ORACLE_USER>;`
  - `grant create ANY MATERIALIZED VIEW to <ORACLE_USER>;`
  - `grant DEBUG ANY PROCEDURE to <ORACLE_USER>;`
  - `grant QUERY REWRITE 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 select on sys.v\_\$parameter TO <oracle\_user>;
- Copy the entire ESTBI v 2.0 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.
- Specify the log file path and name in the log4j.xml. Please update the “value” attribute marked in the following:

```
<!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>
```

- Ensure that the absolute path is given along with read/write/execute permission to the file.
- Execute the “config\_table\_privileges\_for\_atomic\_user.sql” script in configuration schema. This file will be present inside \$FIC\_HOME directory.
- Ensure FICServer is up and running before proceeding for installation.

## 3. Installing the Analytical Application

### 3.1 OFS Enterprise Stress Testing and Capital Planning Analytics v 2.0 Product Installation on OFSAAI 7.3.3.3.0

The OFSAAI Product comprises of components that are installed in Web, Application & Database layer. Hence if you have installed OFSAAI 7.3.3.3.0 in a multi-tier architecture, the Oracle Financial Services ESTBI 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.

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**NOTE:**

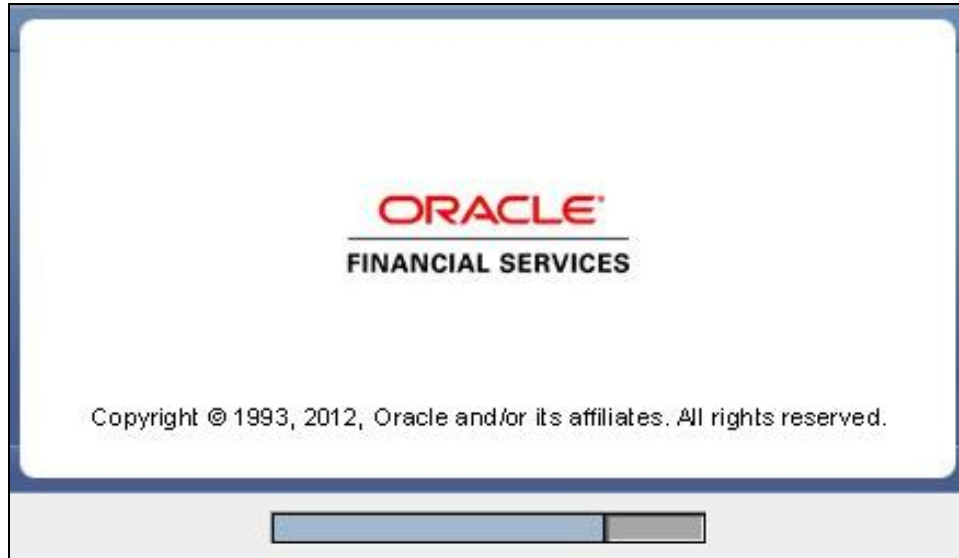
- This section holds applicable if OFSAAI v7.3.3.3.0 is installed on Oracle 11g on separate machines A and B respectively.
- 

For Silent Installation, refer to section on "[Silent Installation](#)".

### 3.1.1. Machine A – Product App Layer

#### Step 1

To begin Oracle Financial Services Enterprise Stress testing and Capital Planning analytics product installation, execute Setup.sh.



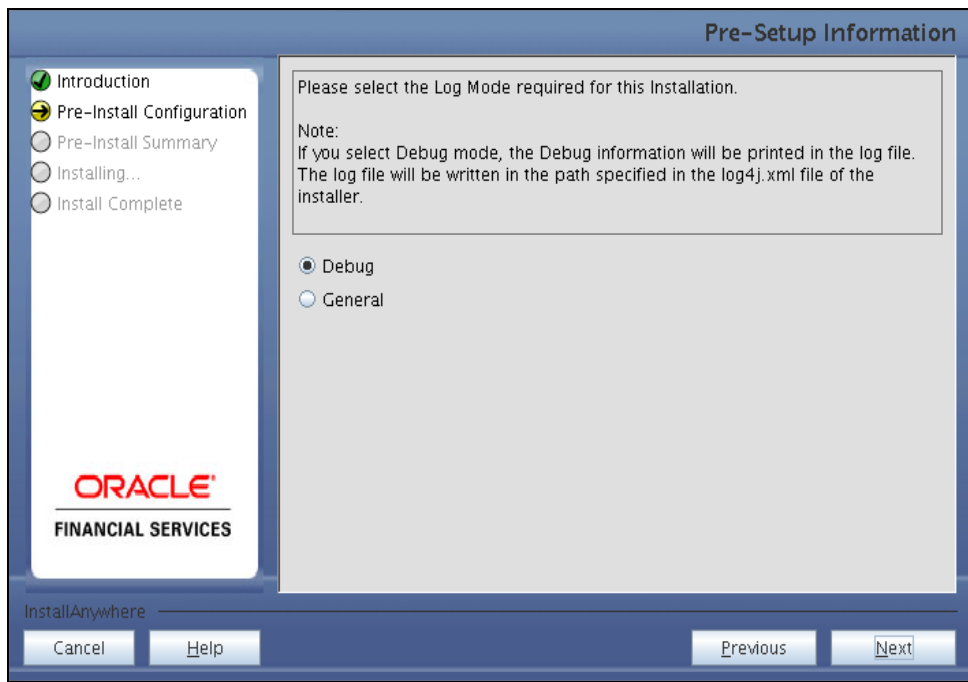
#### Step 2

On loading the installer, the **Introduction** screen displays the prerequisites for installation. Ensure that these prerequisites are met before you proceed



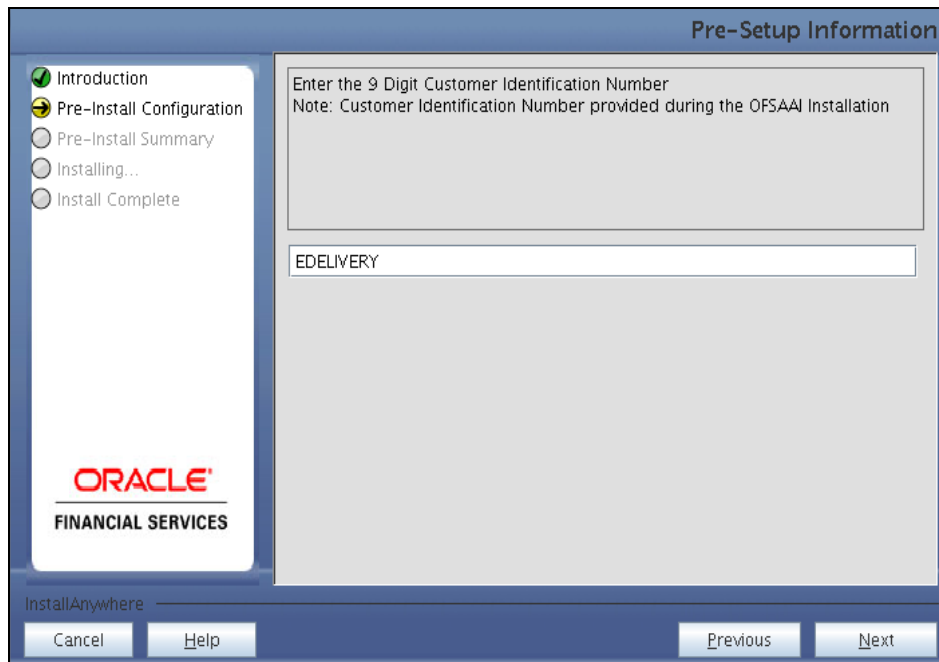
**Step 3**

Please choose the log mode for this installer. In case, if Debug is selected, the Passwords will be printed in the Log File.



### Step 4

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



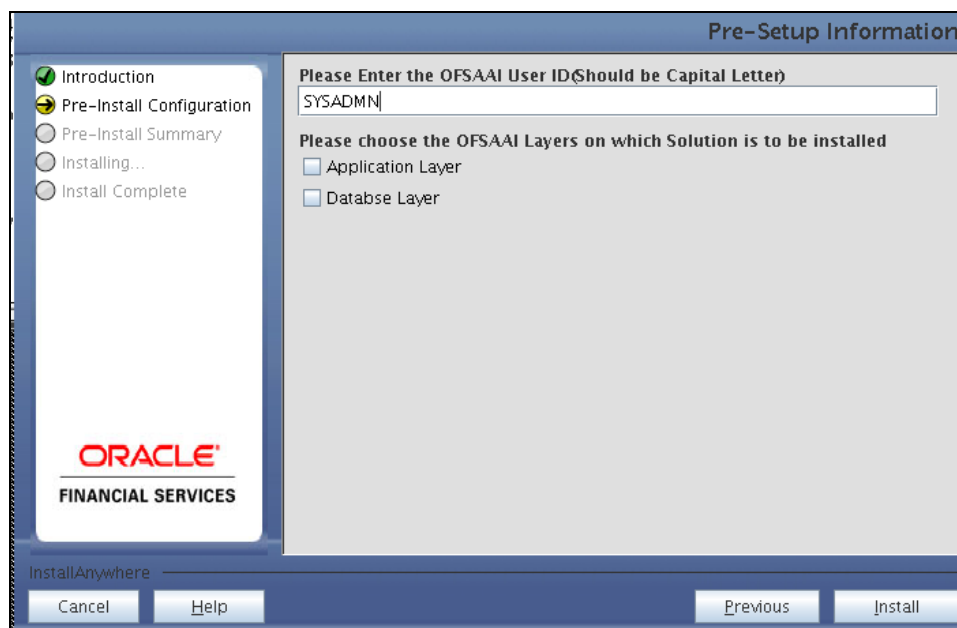
Click **Next** to continue.

### Step 5

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

Select the appropriate OFSAAI layer that has been installed on the machine.

Example **AppLayer**



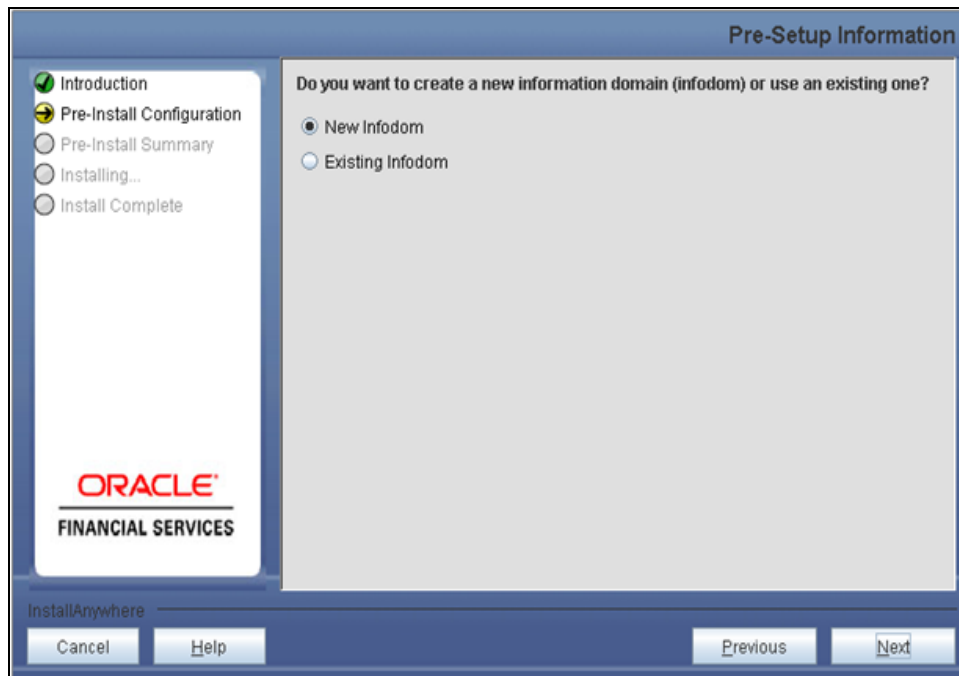
---

**NOTE:**

- Create the User in Infrastructure which was specified during installation process, if it does not exist.
  - For a single-tier OFSAAI Release 7.3.3.3.0 installation, you must select Application Layer and Web layer.
  - For a multitier OFSAAI Release 7.3.3.3.0 installation, select the corresponding layer installed on the machine.
  - Enter OFSAAI ID in uppercase.
- 

**Step 6**

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



Click **Next** to continue.

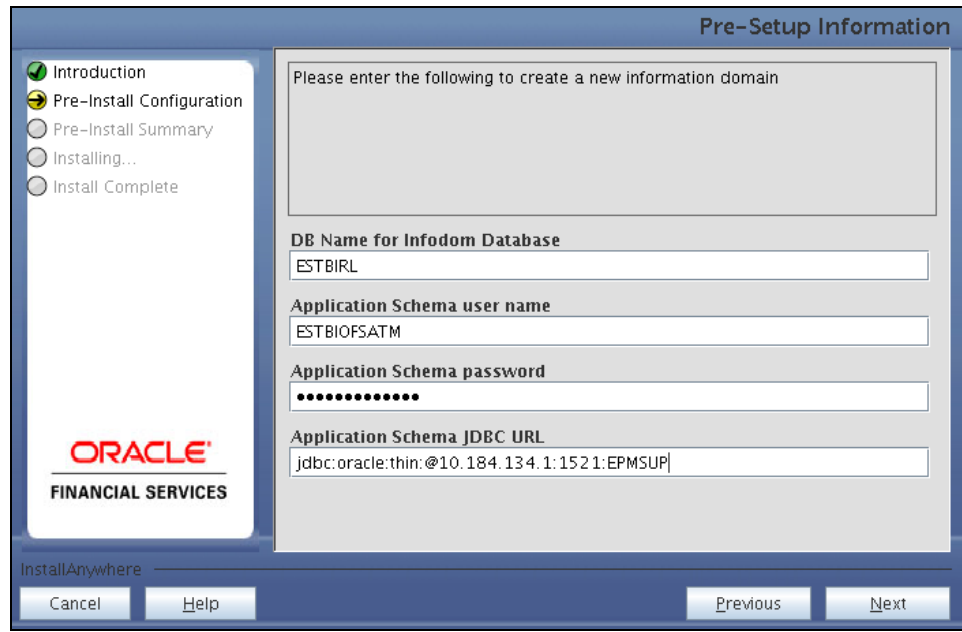
### Step 7

If the option **New Infodom** is chosen, then update the following to create information domain:

#### Step 7-i

- Specify a Database name for the new infodom. Make a TNS entry with the Database name specified in the tnsname.ora file in the oracle server.
- Enter the newly created atomic schema user name, password and JDBC url in relevant fields.

Click **Next** to continue



### Step 7-ii

In the next screen prompt enter the following details:

- Specify the name and description of the new infodom to be created.
- Specify a segment name to be created.

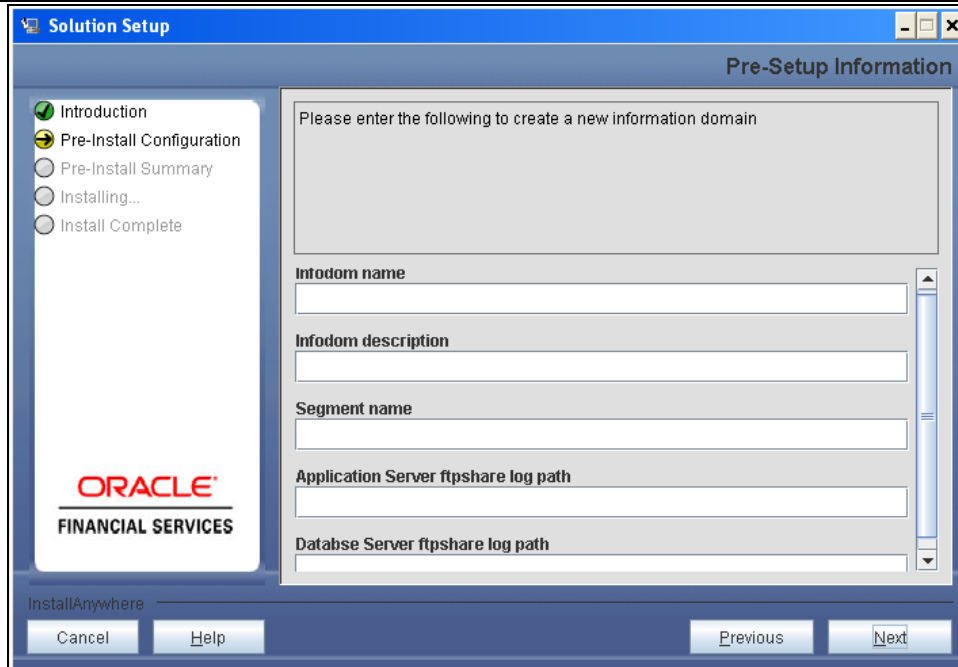
---

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

---

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





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**NOTE:**

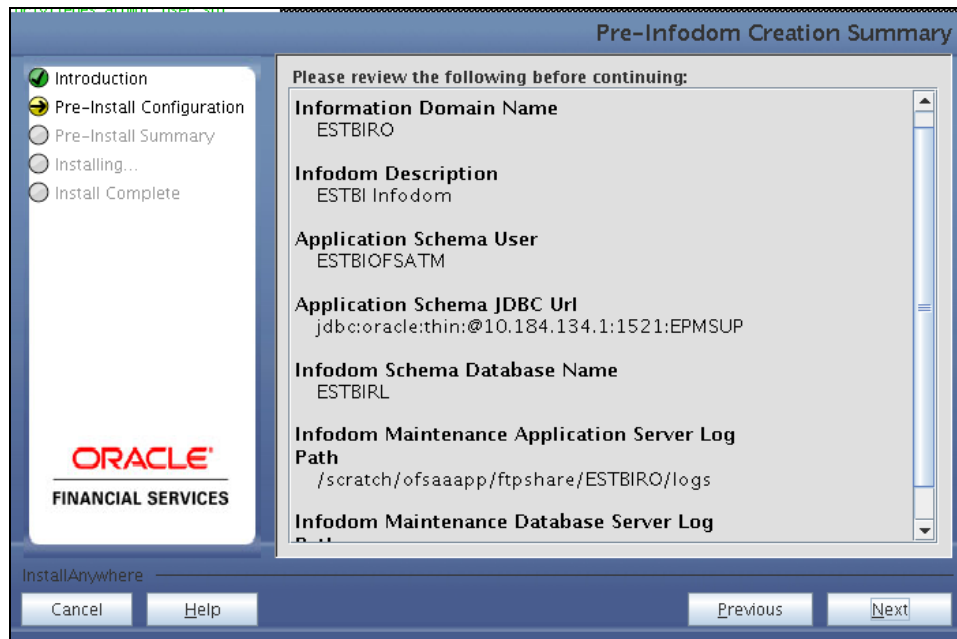
The OFSAAI user must have a role that is able to perform Add/Modify functions for OFS EST & CP metadata.

---

Click **Next** to continue.

**Step 7-iii**

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



A new information domain will be created on clicking **Next**.

#### Step 7-iv

If the option “Existing Infodomain” was selected then, update the following details in the screen prompt that is displayed:

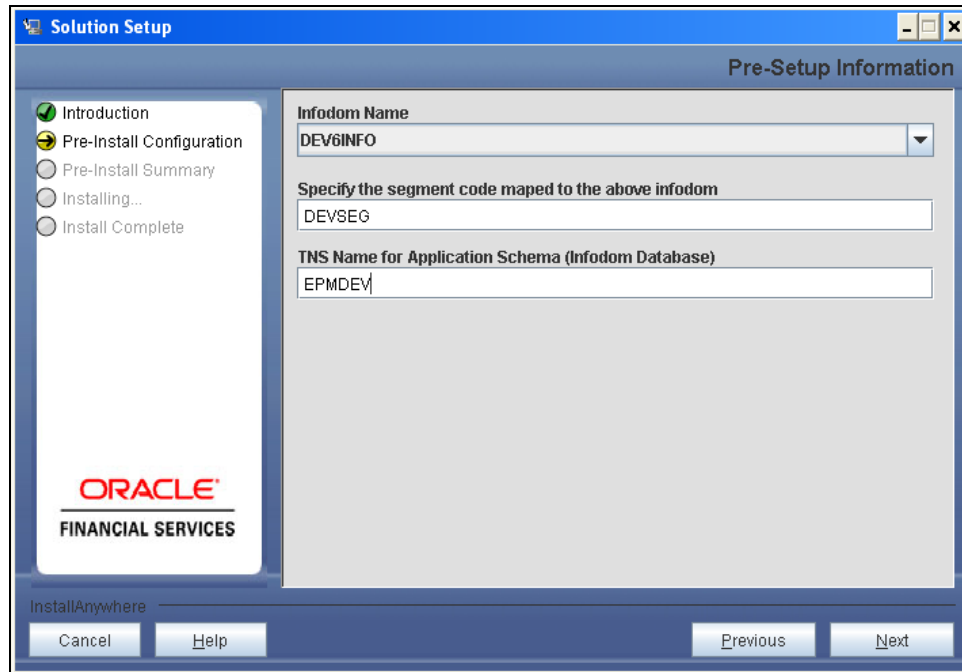
- Select the Information Domain name
- Enter segment code.

---

**NOTE:** Segment code should not exceed 10 characters

---

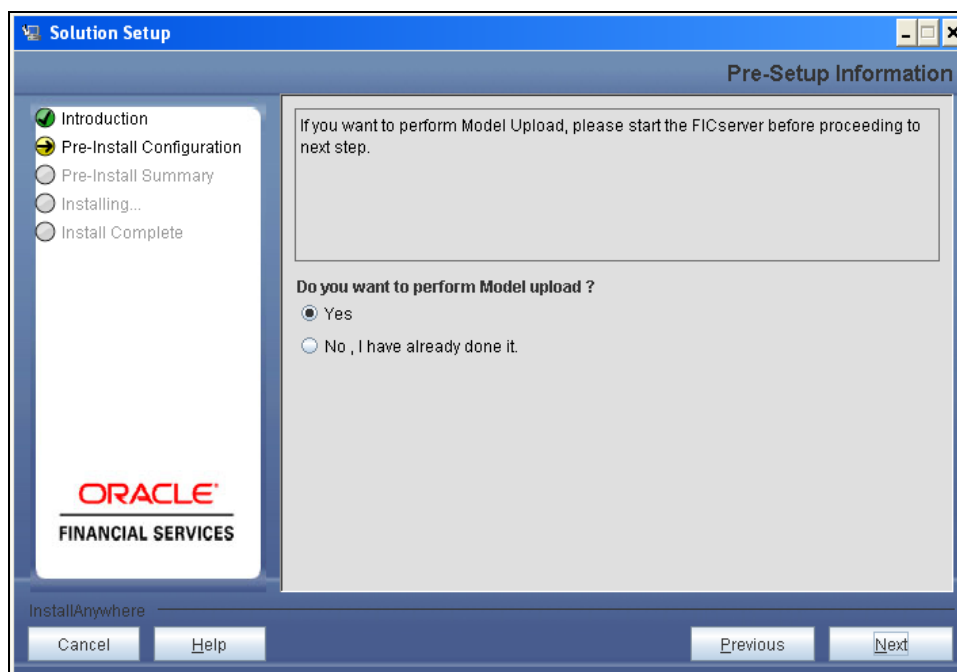
- Enter the application schema’s TNS name.



### Step 8

EST & CP v 2.0 data model is packaged as part of application installer and is installed as part of the following steps, if required.

The following screen prompts, opt for model upload process through installer.



---

**NOTE:**

- Click **Yes** if you want to perform data model upload.
  - Clicking **No** implies that the OFS Basel Regulatory Capital Basic model is already uploaded. Click **Next** to proceed.
- 

If the user selects “Yes”, Step 10 and 11 will be performed..

Upon selecting “No..”, Step 10 and 11 will be skipped. Click **Next** to proceed.

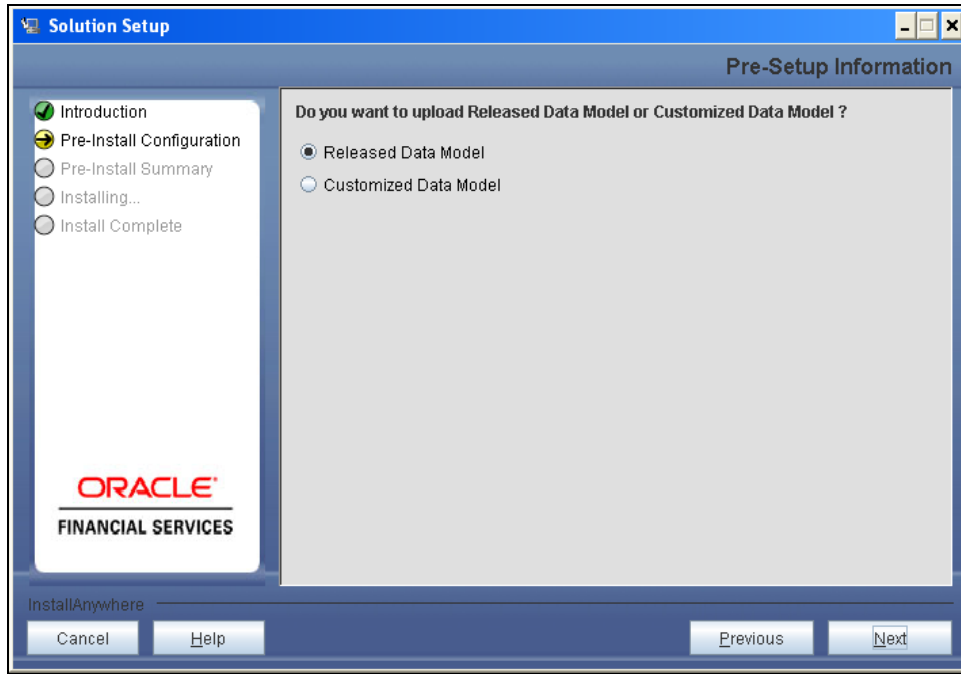
**Step –9**

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

If **Released Data Model** option is selected, then the installer uploads the Enterprise Stress testing and Capital Planning analytics v 2.0 data model.

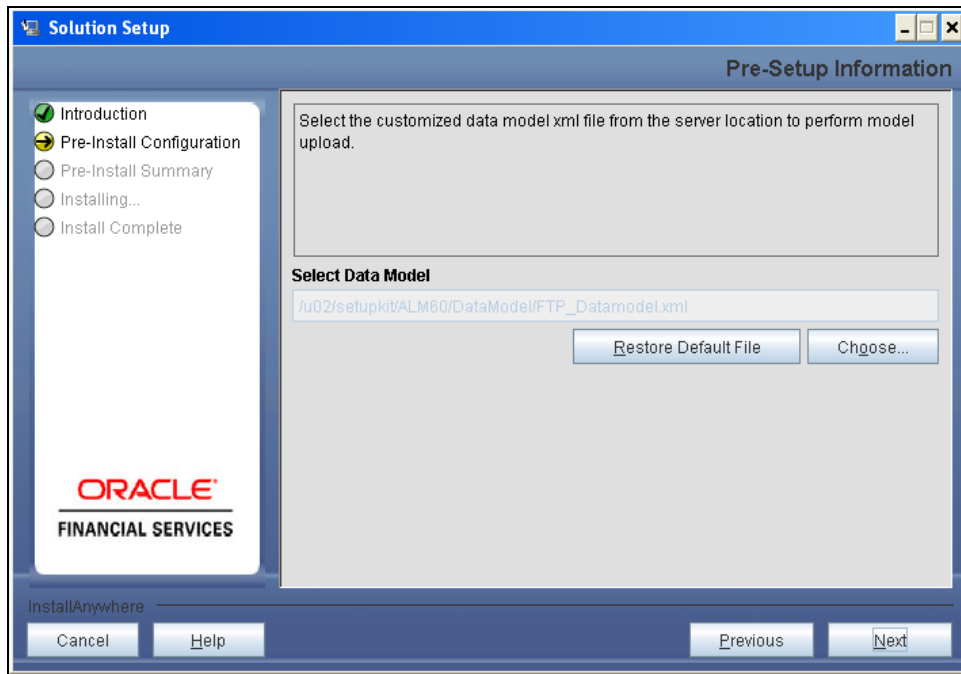
If **Customized Data Model** option is selected, then the installer allows you to select the data model.

Click **Next** to proceed.



**Step – 10**

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.

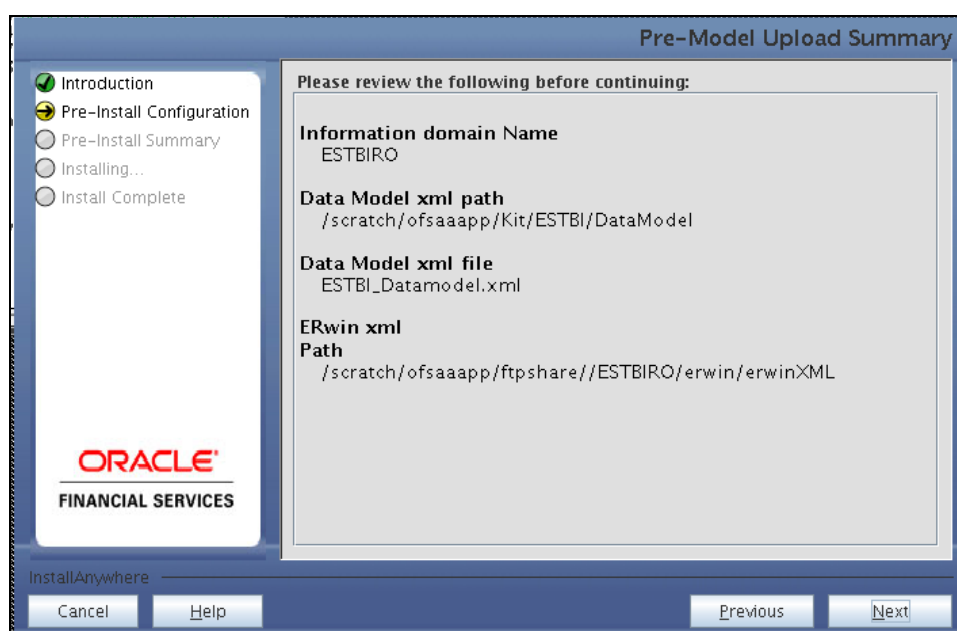


**NOTE:**

- 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 to be selected in this screen prompt 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 – 11**

The following panel displays pre-model upload details.



The time taken for the process of model upload 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 during model upload are

- Insufficient heap memory on the client machine
- Possible reason/resolution: The java memory settings in “revevusstartup.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 HANDLINGDELETING”
  - 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

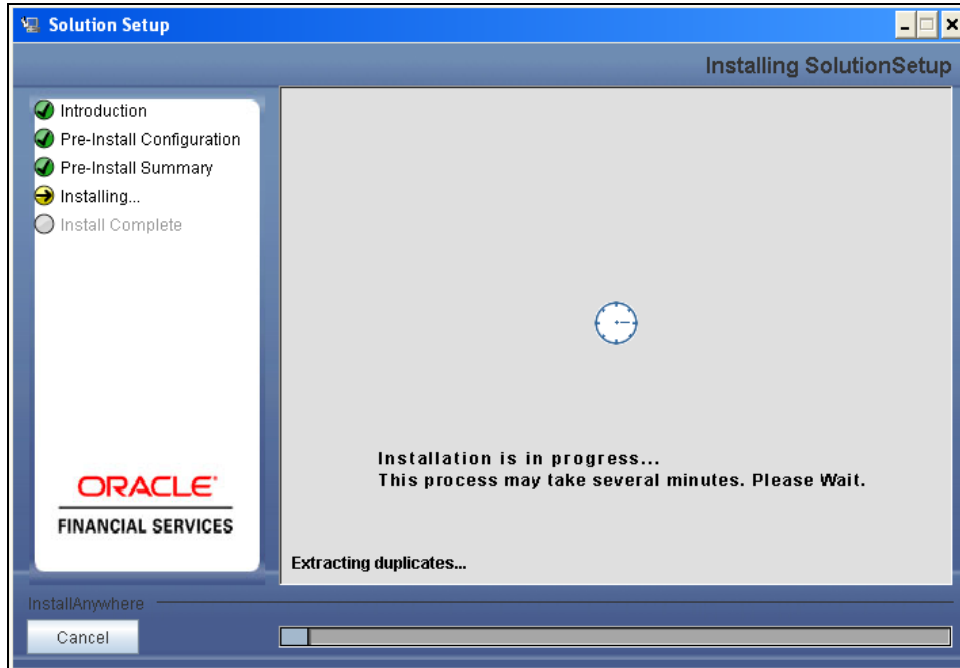
This panel displays all the pre-installation summary. Verify the details and proceed.

Click **Install** to proceed



### Step 13

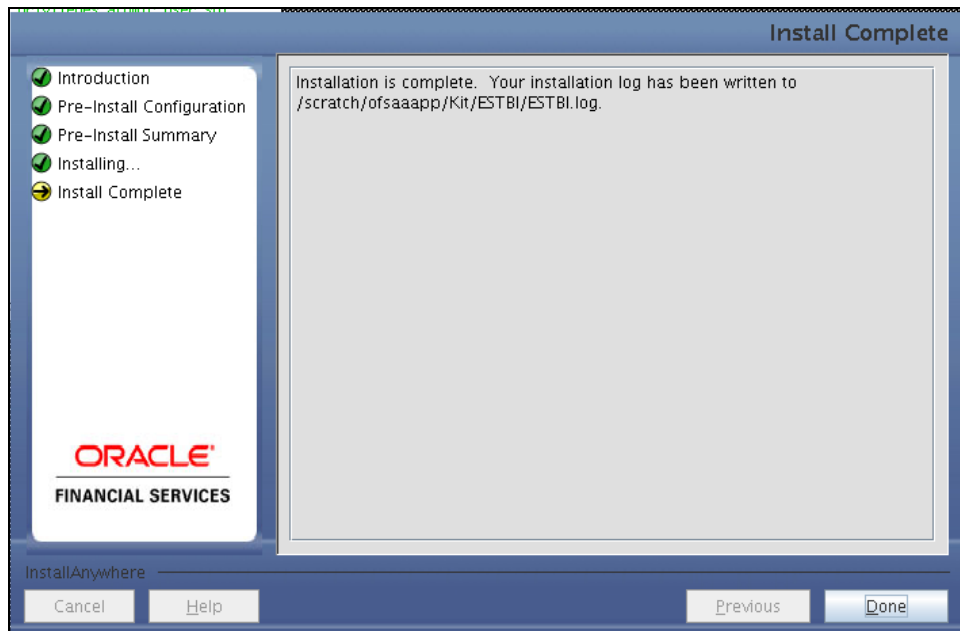
This screen displays the installation process. The installation needs to be completed to proceed further.



### Step 14

The following screen displays the completion of installation of the OFS Enterprise Stress testing and Capital Planning analytics Product Setup.

Click **Done** to exit.

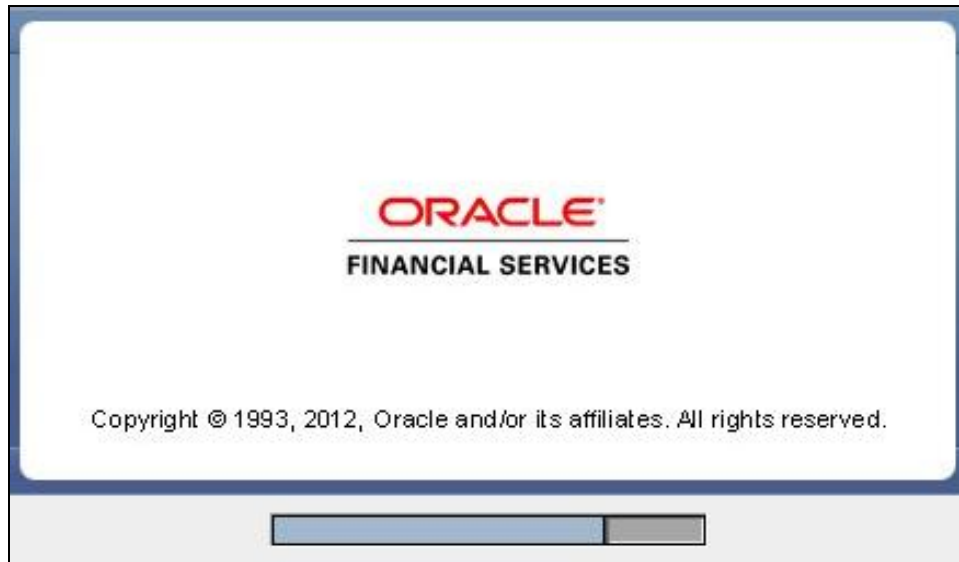




### 3.1.1 Machine B – Product Database Layer

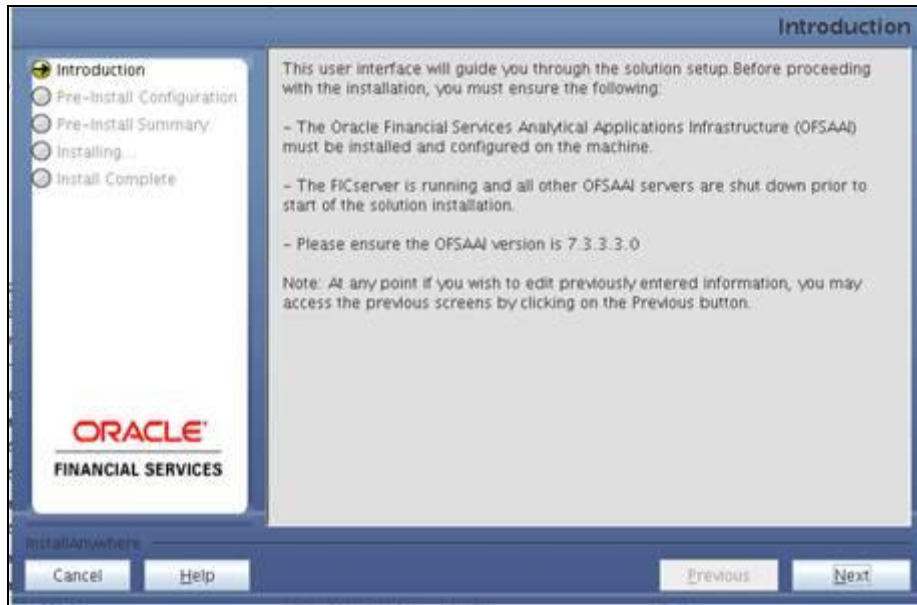
#### Step 1

To begin OFS Enterprise Stress testing and Capital Planning analytics product installation, execute Setup.sh.



#### Step 2

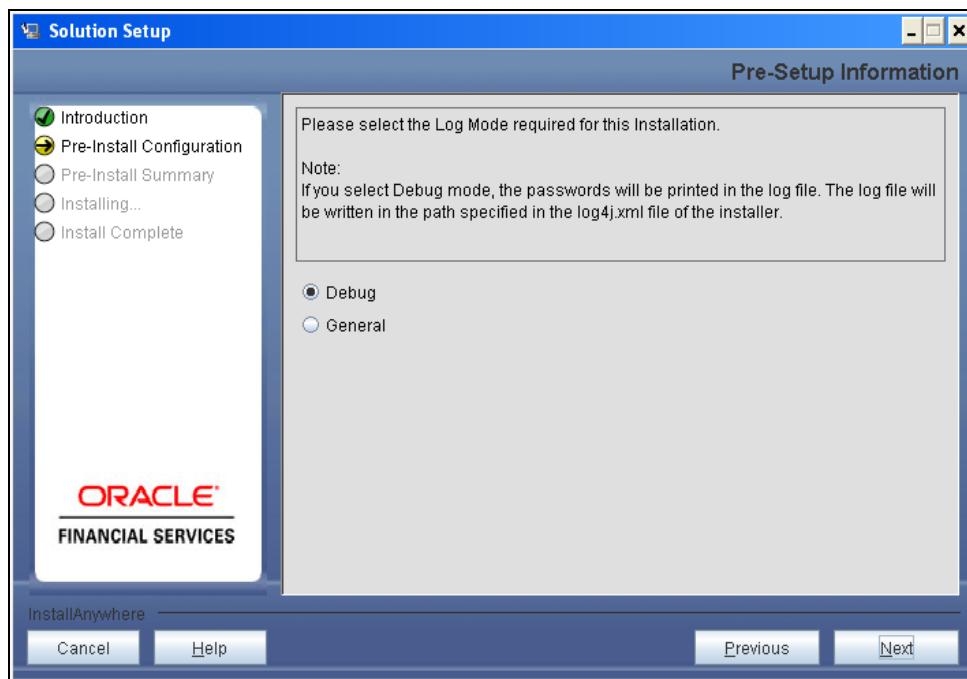
On loading the installer, the **Introduction** screen displays the prerequisites for installation. Ensure that these prerequisites are met before you proceed



### Step 3

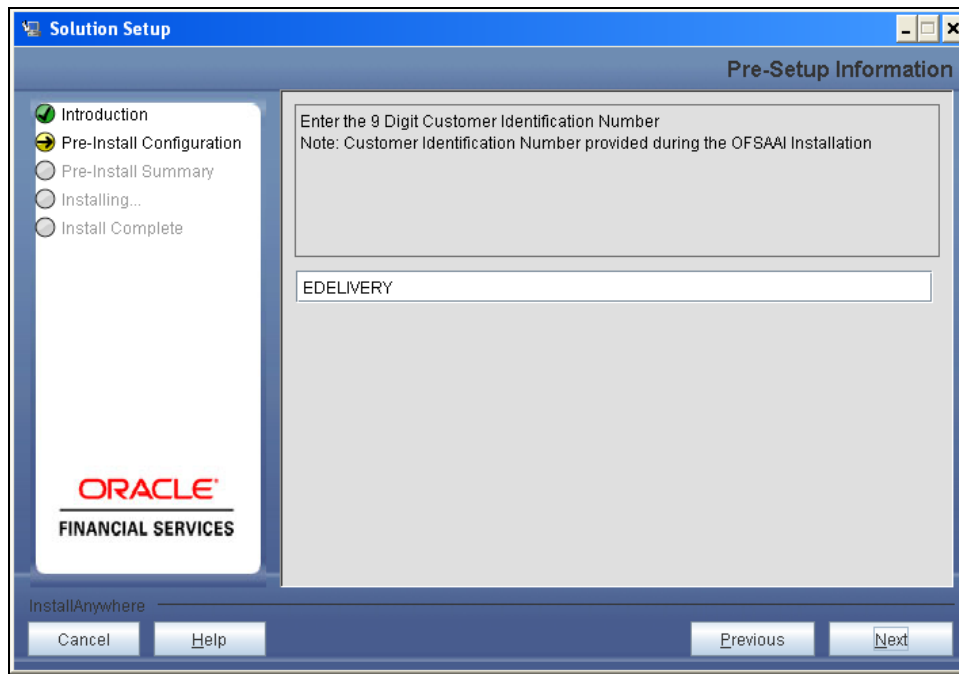
Choose the log mode for this installer. In case, if Debug is selected, the Passwords will be printed in the Log File.

Click **Next** to proceed.



#### Step 4

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



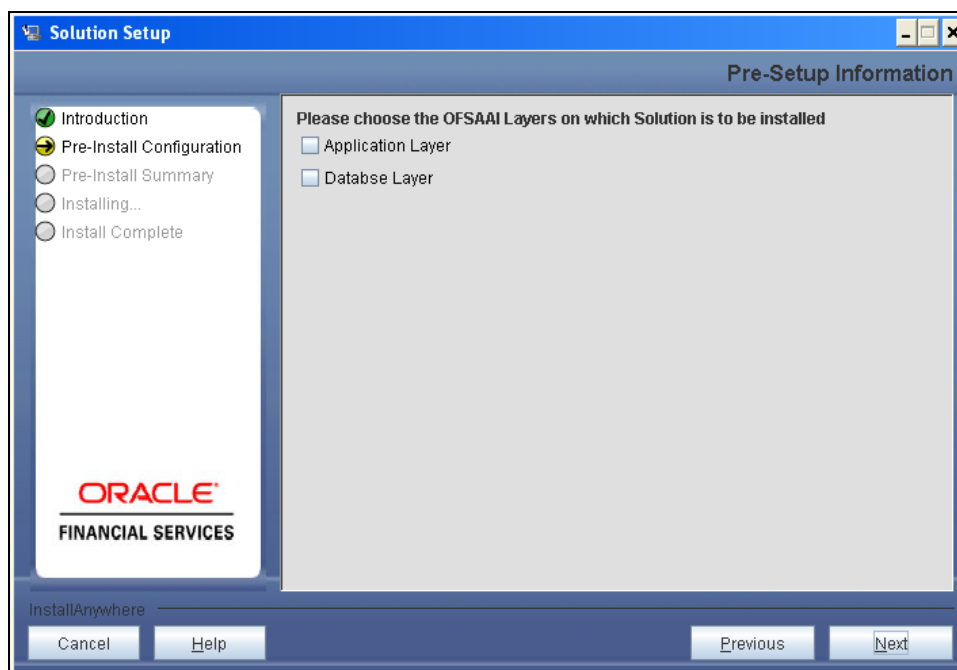
Click **Next** to continue.

#### Step 5

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

Select the appropriate OFSAAI layer that has been installed on the machine.

Example **Database Layer**



Along with appropriate OFSAAI layer choose Administrative Reports to configure the Administrative Reports application.

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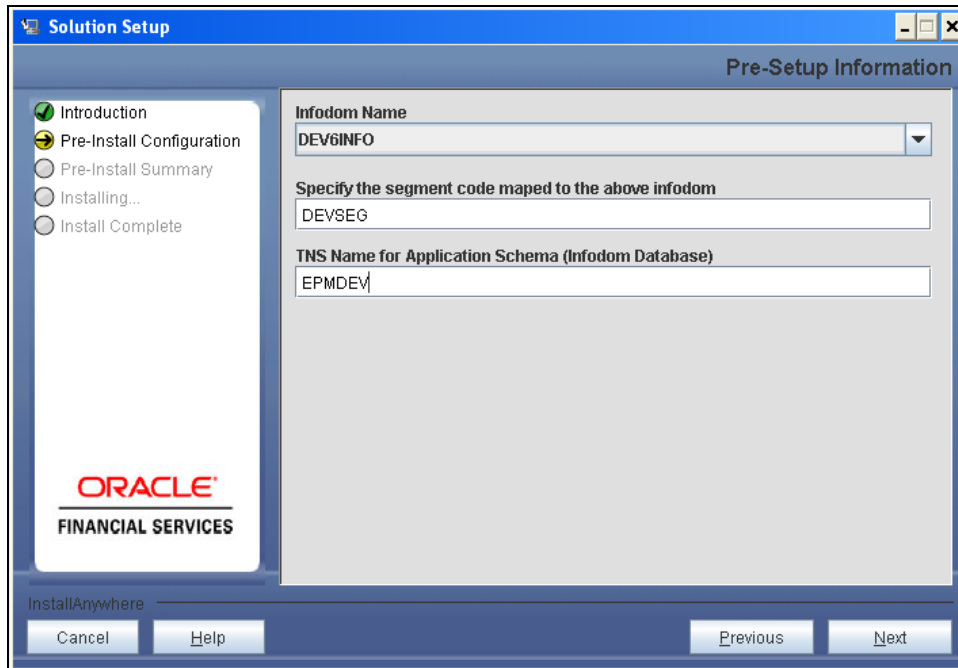
**NOTE:**

- Create the User in Infrastructure which was specified during installation process, if it does not exist.
  - For a single-tier OFSAAI Release 7.3.3.3.0 installation, you must select Application Layer, Database Layer and Web layer.
  - For a multitier OFSAAI Release 7.3.3.3.0 installation, select the corresponding layer installed on the machine.
- 

**Step 6**

The following screen displayed 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.

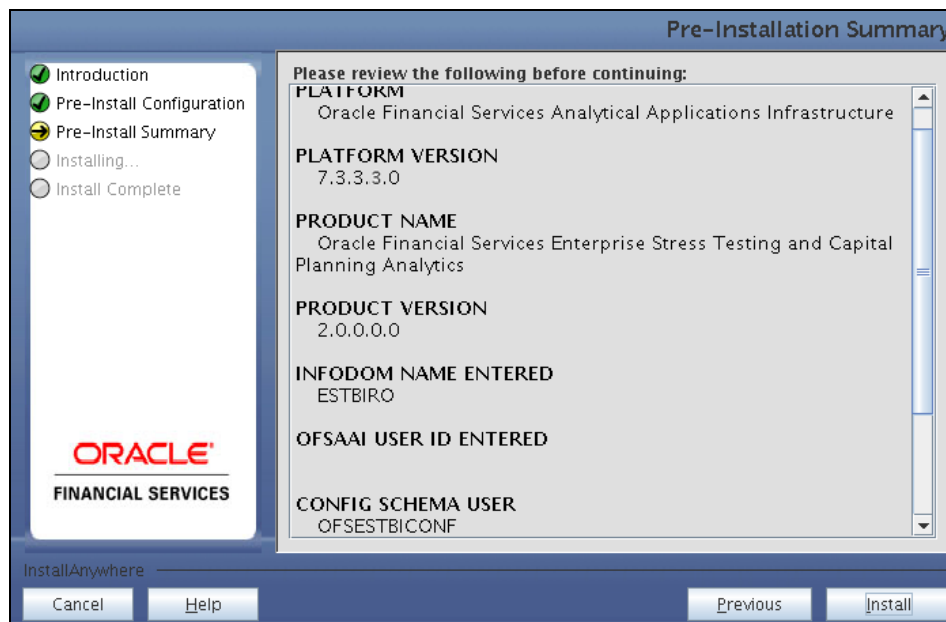
Segment code should not exceed 10 characters.



### Step 7

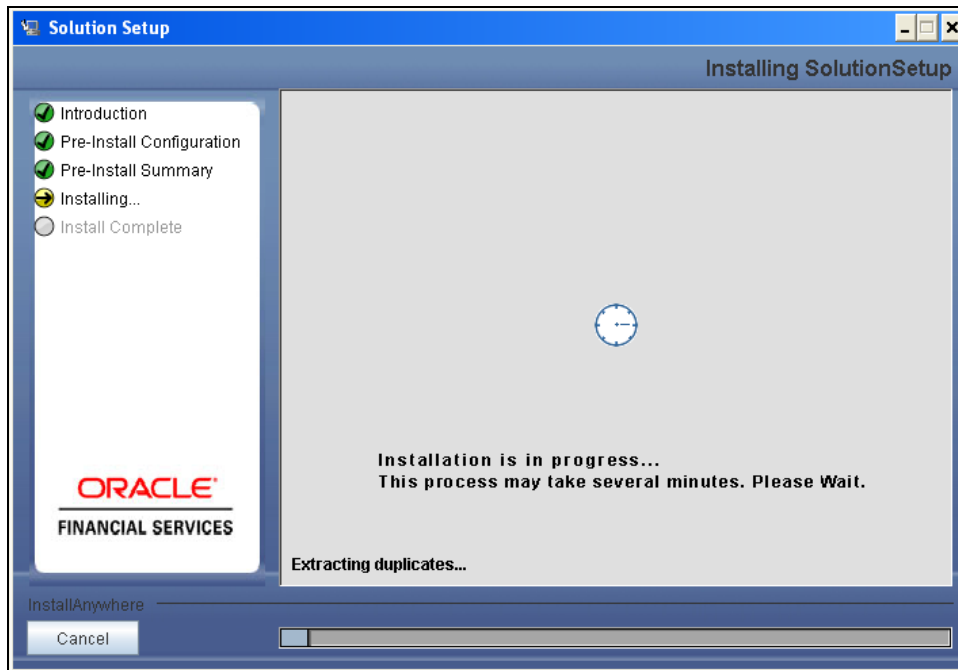
This screen displays all the pre-installation summary. Verify the details and proceed.

Click **Install** to proceed.



### Step 8

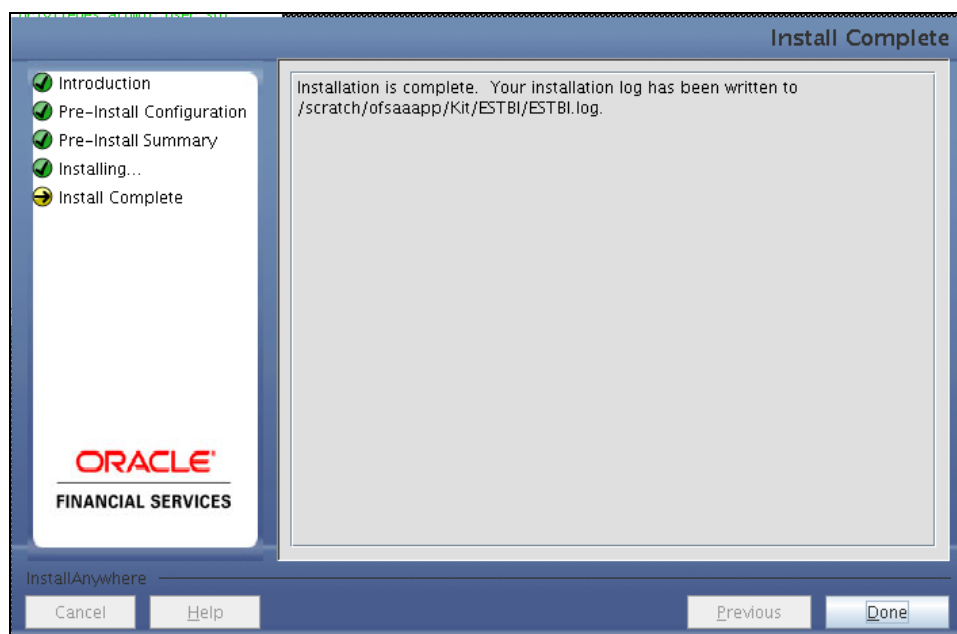
This screen displays the installation process. The installation needs to be completed to proceed further.



### Step 9

The following screen displays the completion of installation of the Oracle Financial Services EST & CP Product Setup.

Click **Done** to exit.



## 3.2 OFS Enterprise Stress Testing and Capital Planning Analytics v 2.0 Installation- Silent Mode

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.

### 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 embedded table lists all the properties that need to be specified.



Silent.Properties.xls

## 3.3 Post Installation Activities

### 3.3.1 OFSAI Server Memory Configuration

Once the installation of Oracle Financial Services EST & CP Product is completed, 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

Execute the following scripts (from */FSAPPS\_6.1/trunk/Fusion APPS/SQLscripts/atomic/create/*) in the database, and in the order mentioned below:

1. VW\_TOP\_CP\_95\_CVA.sql
2. VW\_TOP\_20\_CVA\_STRESS.sql
3. VW\_TOP\_20\_NETCE\_STRESS.sql
4. VW\_TOP\_20\_GROSSCE\_STRESS.sql
5. REFRESH\_MATERIALIZED\_VIEW\_Script.sql. This script should be used to refresh all the above mentioned materialized views after populating the "FCT\_CP\_CREDIT\_QUALITY\_SUMMARY" fact table.



## 4. OFS Enterprise Stress Testing and Capital Planning Analytics Configuration

Perform the below mentioned steps to configure EST & CP v6.0 Dashboards & Regulatory Reports after OBIEE installation (Server):

### 4.1 Preliminary Installation of Software

Ensure Oracle Business Intelligence (Version 11.1.1.7.1) installation is complete and available.

### 4.2 Modify Repository Connection Pool Settings

#### For Windows Server

1. Copy the Repository file from the \$FIC\_HOME/ESTBI/OBIEE11G/ and place it in the Repository folder where OBIEE is installed.

That is, <OBIEE Install Folder>/instances/instance1/bifoundation/OracleBI ServerComponent/coreapplication\_obis1/repository.

2. Select Start > Programs > Oracle Business Intelligence > Administration.
3. Select File > Open > Offline.
4. Locate the ESTBI.rpd and open.
5. Provide Repository password. The Repository password is '**Admin123**'

#### Set the Connection Pool Properties

6. In the "Physical" layer, under Database object double-click on the "ESTBI Connection Pool" and "ESTBI Init Block" to update its properties.
7. In the 'General' tab, edit / check the following entries:

- Call Interface: Default (OCI 10g/11g)
- Update Data source name as give in the below example:

Example  
(DESCRIPTION=(ADDRESS\_LIST=(ADDRESS=(PROTOCOL=TCP)(HOST=<Database IP Address>)(PORT=<Port no>)))(CONNECT\_DATA=(SID=<Database name>)))

- User name: Enter Database Schema user name
- Password: Enter Database Schema password

8. Click **OK** to close the window and click 'Save' to save the RPD file.
9. Click **No** for the Global Consistency Message.
10. Close the RPD file (File / Exit).

### For Other Servers

1. Copy the Repository file from the \$FIC\_HOME/ESTBI/OBIEE11G and place it anywhere in the local Windows system.
2. Open the BI Administration tool in the windows environment.
3. Select Start > Programs > Oracle Business Intelligence Enterprise Edition Plus Client> Administration.
4. Select File > Open > Offline.
5. Locate the file ESTBI.rpd and open.
6. Provide Repository password. The Repository password is '**Admin123**'

Set the Connection Pool Properties as described above 6-14.

## 4.3 Starting Node manager and Weblogic Servers

1. Check if the Node Manager is running or not. If not then follow the below steps.

### For Windows Server

- 1.1 Go to the services.
- 1.2 Start the Service Oracle Weblogic NodeManager.



Alternatively you can start Node Manager and all the managed services from, All Programs -> Oracle Business Intelligence-> Start BI Services option in the start menu.



### For Other Servers

1.3 Navigate to < OBIEE Install Folder >/ wserver\_10.3/server/bin folder.

1.4 Run the following command: **'nohup ./startNodeManager.sh &'**

2. Check if the Weblogic AdminServer is running or not. If not then, follow the below steps.

### For Windows Server

2.1 Navigate to < OBIEE Install Folder >/user\_projects/domains/bifoundation\_domain/bin

2.2 Run the following command: startWebLogic.cmd

Note: The Weblogic Admin Server would have been already started if you had started through the All Programs -> Oracle Business Intelligence-> Start BI Services option as stated above.

### For Other Servers

2.3 Navigate to < OBIEE Install Folder >/user\_projects/domains/bifoundation\_domain/bin

2.4 Run the following command: **'nohup ./startWebLogic.sh &'**

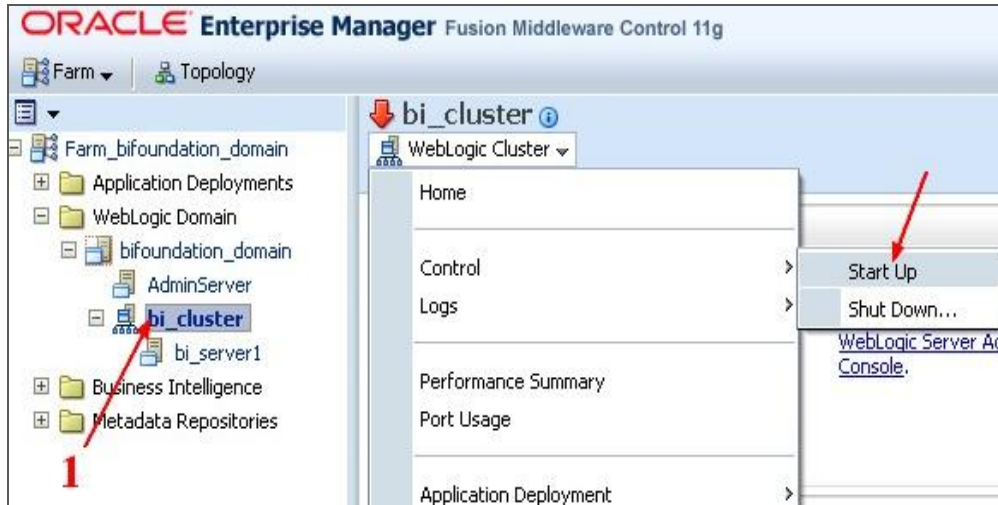
2.5 Enter the weblogic credential defined during the installation.

2.6 The service may take a few minutes to come up, depending on the environment. Wait until the command line stops scrolling and indicates server in RUNNING mode.

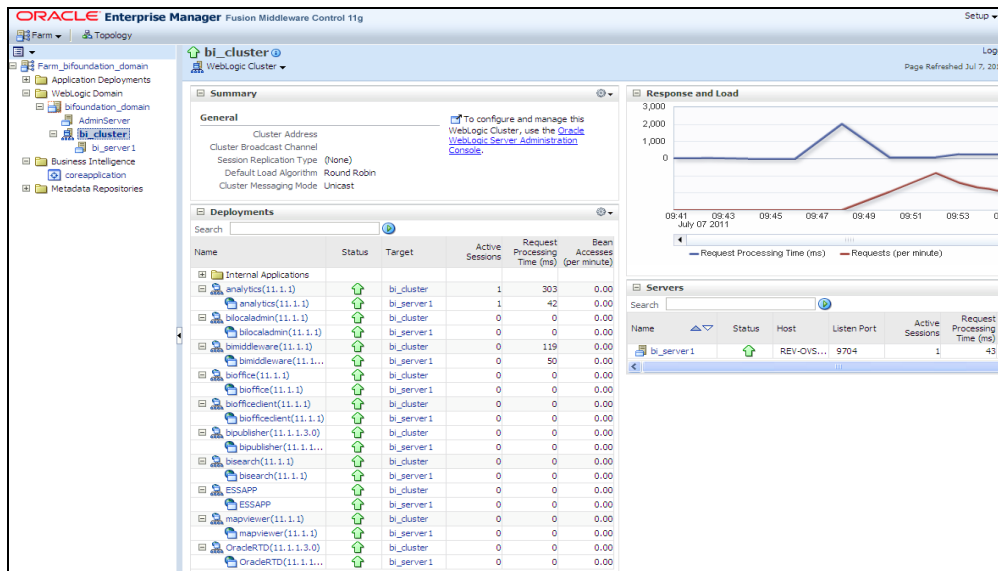
```
<Aug 25, 2010 10:32:06 AM CEST> <Notice> <WebLogicServer> <BEA-000365> <Server state changed to RUNNING>  
<Aug 25, 2010 10:32:06 AM CEST> <Notice> <WebLogicServer> <BEA-000360> <Server started in RUNNING mode>
```

3. Start Weblogic Managed Server (bi\_server1)

- 3.1 Log in to Fusion Middleware Control ' <http://<hostserver name or IP>:<Port No Default is 7001>/em>' using the weblogic credentials defined during installation.
- 3.2 Under the WebLogic Domain expand the bifoundation\_domain node in the navigation tree, and select bi\_cluster. Select bi\_cluster, and click the WebLogic Cluster menu to the right of it. Select the Control option from the menu, and select Start Up to start the Managed Servers.



- 3.3 Verify the status of the applications.

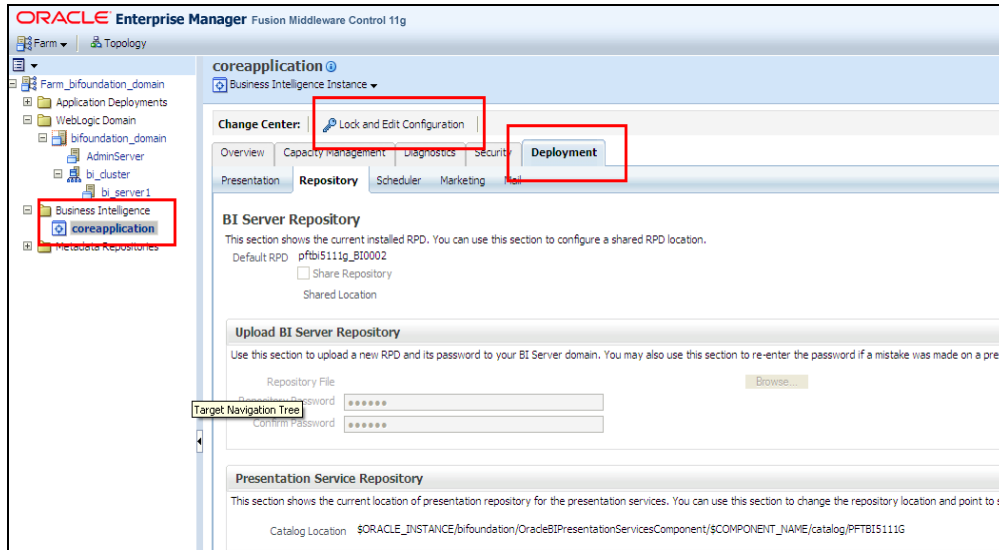


## 4.4 Deployment

### 1. Deploy RPD file.

1.1 Log in to Fusion Middleware Control 'http://<hostserver name or IP>:<Port No Default is 7001>/em' using the weblogic credentials defined during installation.

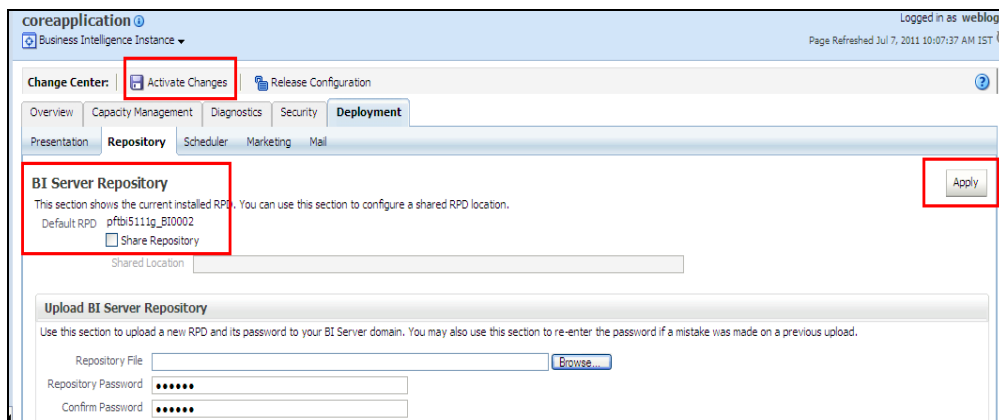
1.2 Go to Business Intelligence folder > coreapplication> Deployment and click **Lock and Edit Configuration**.



1.3 In the Upload BI Server Repository click on Browse and locate the folder where the new ESTBI.RPD which has to be deployed is present.

1.4 Now enter the existing RPD Password (Admin123). Then Apply > Activate Changes.

1.5 You can see the new Default RPD as the ESTBI\_BI0001.



1.6 Restart the BI Server as mentioned in section E.

- 1.7 Modify the NQSConfig.INI file to incorporate User Roles and Group Id changes in case any GUID related error occurs. The location is

< OBIEE Install Folder>  
/instances/instance1/config/OracleBIServerComponent/coreapplication\_obis1

Change the FMW\_UPDATE\_ROLE\_AND\_USER\_REF\_GUIDS to YES.

Example, FMW\_UPDATE\_ROLE\_AND\_USER\_REF\_GUIDS = YES;

- 1.8 After modifying the file, restart the BI services again to remove the above error.

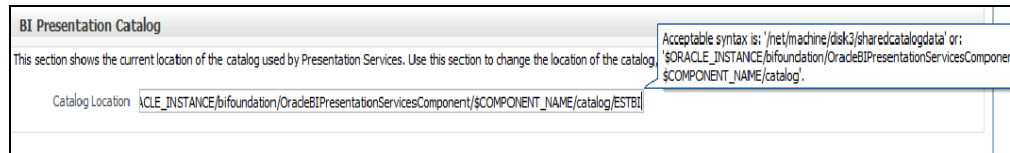
## 2. Deploy Web Catalog.

- 2.1 Copy the ESTBI.zip file from \$FIC\_HOME/ESTBI/OBIEE11G/ folder and Unzip the ESTBI.zip to get the estbi.catalog.

- 2.2 Go to Enterprise Manager Farm\_bifoundation\_domain > Business Intelligence folder > coreapplication> Deployment > Repository and check for the Catalog name. Change to ESTBI then apply and activate changes. Once the Presentation Service is restarted it will create a new empty catalog with the name given.

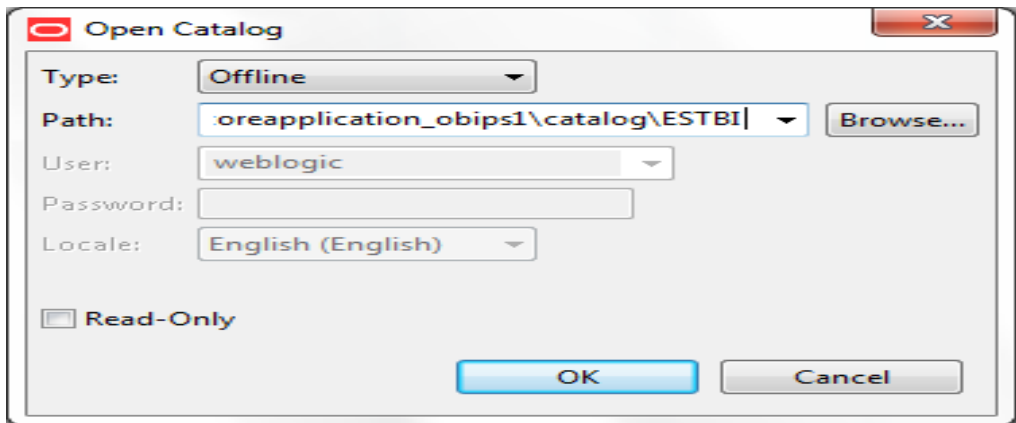
Example,

\$ORACLE\_INSTANCE/bifoundation/OracleBIPresentationServicesComponent/\$COMPONENT\_NAME/catalog/ESTBI

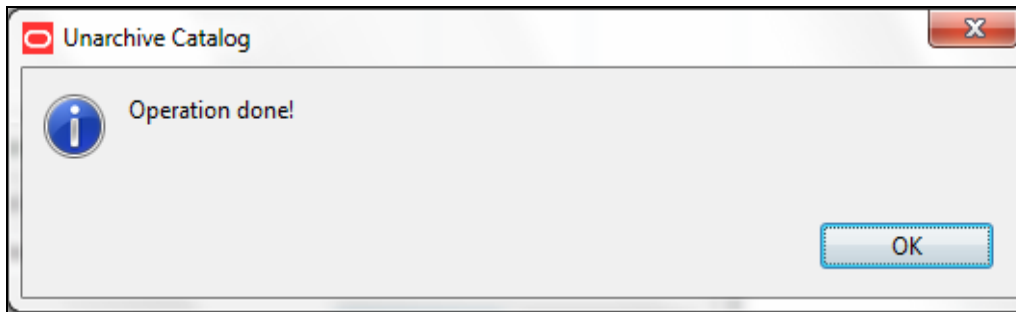
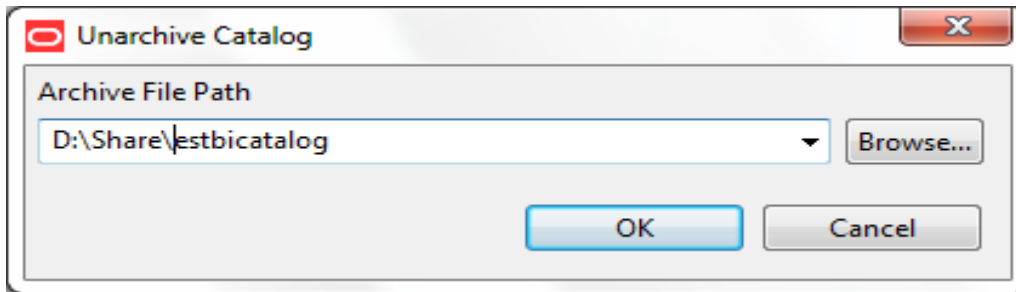
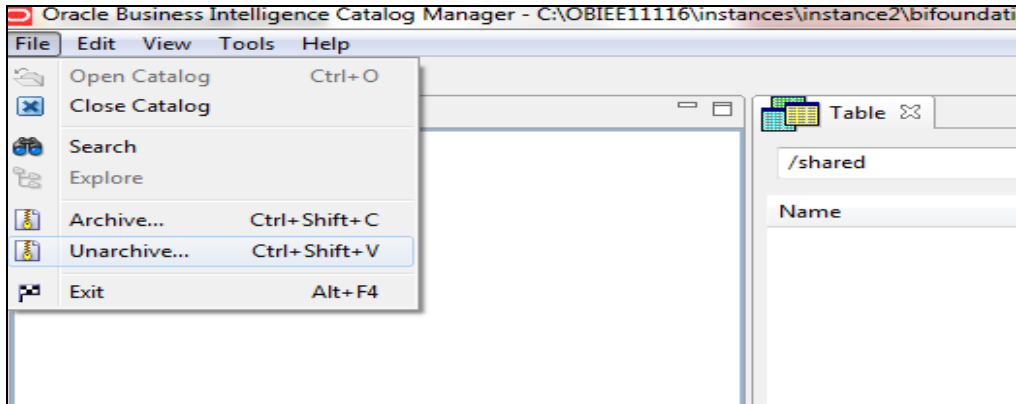


- 2.3 Go to Catalog Manager. Open the newly created catalog. File -> Open Catalog.

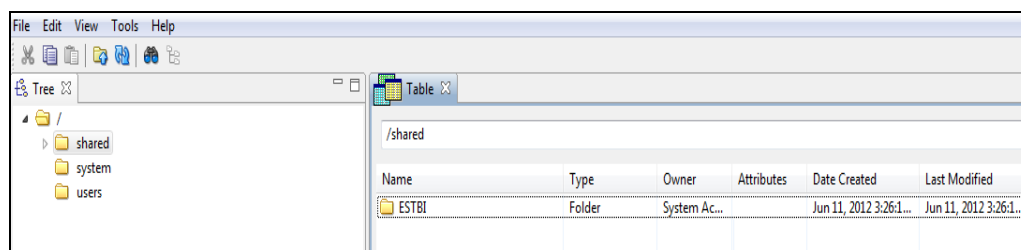
- 2.4 Open the catalog offline -> Browse to the catalog path. Click **OK**.



2.5 Now navigate to the **/shared** folder in the catalog manager and Unarchive by selecting the path where the estbi.catalog was present. Keep the privileges as it was for the original catalog provided. Click **OK**.



2.6 Verify that the ESTBI folder appears under /shared folder.



2.7 Manage BI Publisher for JDBC connection.

- a. Login to OBIEE 11.1.1.7.1 and navigate to the following path: Administration → Manage BI Publisher → JDBC Connection → Add Data Source button.
- b. Provide the following Information after clicking on the Add Data Source Button:
  - i. Data Source Name: ESTBI
  - ii. Driver Type: Oracle 11g
  - iii. Connection String in the format: jdbc:oracle:thin:@[host]:[port]:[sid]
    1. For example, jdbc:oracle:thin:@10.184.202.172:1521:OIDB
  - iv. Username: <<Database Schema User Name>>
  - v. Password: << Database Schema Password>>
- c. Click **Test Connection** button, and ensure that the test is successful.
- d. Restart the BI services.

2.8 . Restart the BI Presentation Services (see section E) to apply the change.

2.9 Modify the instanceconfig.xml file in case of any GUID error related to the BI Presentation Server to instruct Presentation Services to refresh GUIDs on restart.

The location of instanceconfig.xml file is  
 < OBIEE Install Folder>  
 /instances/instance1/config/OracleBIPresentationServicesComponent/coreapplication\_obips1

Edit the file to add the line  
 <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs> and restart the BI presentation services once again.

2.10 Note that the steps mentioned above will force the BI Presentation Services to shut down after updating the Account GUIDS.

In such case, go to instanceconfig.xml file and revert back the changes made, that is, remove the line <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs> from the instanceconfig.xml file and restart the services again.



## 4.5 Starting the Analytics services

The Oracle Business Intelligence system components can be started in any of the following manner.

1. Through OPMN controller

### For Windows Server

- 1.1 Open a command prompt, navigate to <OBIEE Install Folder>/instances/instance1/bin

- 1.2 Run the 'opmnctl startall' command.

### For Other Servers

- 1.3 Navigate to < OBIEE Install Folder > /instances/instance1/bin

- 1.4 Run the command '**./opmnctl startall**'

- 1.5 Check the status by running the command '**./opmnctl status**'

```
[obiee11g@REV-OVS-X13 bin]$ ./opmnctl startall
opmnctl startall: starting opmn and all managed processes...
[obiee11g@REV-OVS-X13 bin]$ ls
opmnctl
[obiee11g@REV-OVS-X13 bin]$ ./opmnctl status

Processes in Instance: instance1
-----+-----+-----+-----+
ias-component | process-type | pid | status
-----+-----+-----+-----+
coreapplication_obiccs1 | OracleBIClusterCo~ | 23604 | Alive
coreapplication_obisch1 | OracleBIScheduler~ | 23602 | Alive
coreapplication_obijh1 | OracleBIJavaHostC~ | 23606 | Alive
coreapplication_obips1 | OracleBIPresentat~ | 23603 | Alive
coreapplication_obis1 | OracleBIServerCom~ | 23605 | Alive
[obiee11g@REV-OVS-X13 bin]$
```

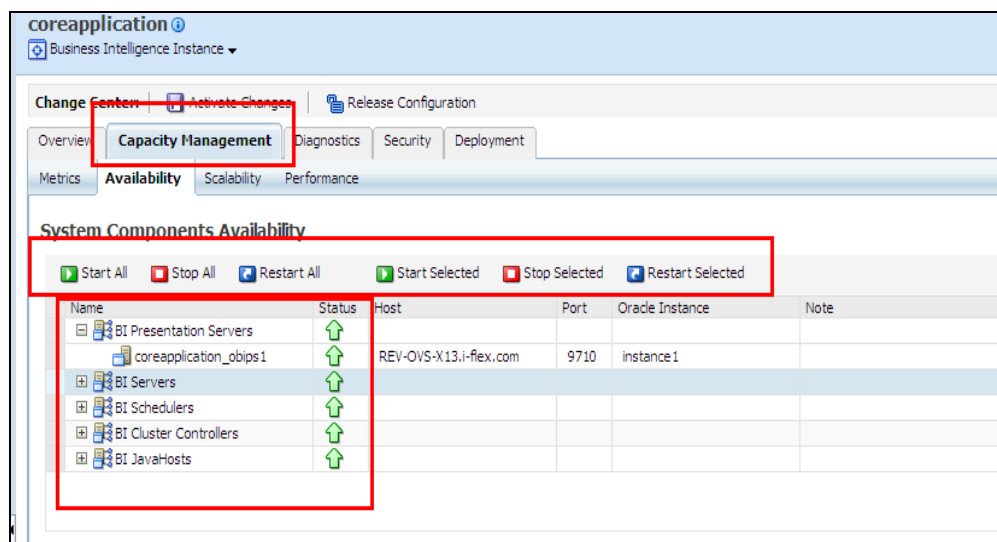
2. Through Enterprise Manager

- 2.1 Login to the EM administration screen using the url '**http://<hostserver name or IP>:<Port No Default is 7001>/em**'

- 2.2 Expand 'Business Intelligence' node on the left and choose Coreapplication.

- 2.3 Navigate to Capacity management > Availability.

- 2.4 Click the necessary buttons to start and stop the services.



3. In case of any problems check for the log files present in the respective diagnostic folders of analytics server. i.e. <OBIEE Install Folder>/instances/instance1/diagnostics/logs.

## 4.6 Creating Users and Group and Mapping it to Risk Manager Role

### Adding Role to Enterprise Manager

1. Go to Path <OBIEE Install Folder>/user\_projects/domains/bifoundation\_domain/config/fmwconfig.
2. Take the Backup of system-jazn-data.xml.
3. Add the attached/below tag inside </app-roles> tag in system-jazn-data.xml



Roles.xml

```

<app-role>
  <name>Risk Manager</name>
  <display-name>Risk Manager</display-name>
  <guid>FE951110E94A11E28F2F456D5436F766</guid>
  <class>oracle.security.jps.service.policystore.ApplicationRole</class>
  <members>
    <member>

```

```
<class>weblogic.security.principal.WLSGroupImpl</class>
<name>Risk Manager Group</name>
</member>
<member>
```

```
<class>oracle.security.jps.service.policystore.ApplicationRole</class>
<name>BIAuthor</name>
<guid>1587F6E0609211E28F0B2D8A634B9BFC</guid>
</member>
<member>
```

```
<class>oracle.security.jps.internal.core.principals.JpsAuthenticatedRoleImpl</class>
<name>authenticated-role</name>
</member>
</members>
</app-role>
```

4. Now restart the obiee weblogic server as described in section C.

### Creating User and Groups

1. Log in to '**http:// <host server name or IP>:<Port No default is 7001>/console**' using your weblogic credentials created during platform install.
2. Click Security Realms then go to myrealm.
3. Click The Tab User and Groups and create new User and Group.

The screenshot shows the 'Settings for myrealm' interface. The 'Users and Groups' tab is selected and highlighted with a red box. Below it, the 'Groups' sub-tab is also highlighted with a red box. A message states: 'This page displays information about each group that has been configured in this security realm.' Below this, there is a 'Customize this table' link and a 'Groups' section with 'New' and 'Delete' buttons. A table lists 14 groups with columns for Name, Description, and Provider. The 'New' button at the bottom of the table is highlighted with a red box.

Name	Description	Provider
AdminChannelUsers	AdminChannelUsers can access the admin channel.	DefaultAuthenticator
Administrators	Administrators can view and modify all resource attributes and start and stop servers.	DefaultAuthenticator
AppTesters	AppTesters group.	DefaultAuthenticator
BankGlobalCFO		DefaultAuthenticator
BIAdministrators	BI Administrators Group	DefaultAuthenticator
BIAuthors	BI Authors Group	DefaultAuthenticator
BIConsumers	BI Consumers Group	DefaultAuthenticator
CrossDomainConnectors	CrossDomainConnectors can make inter-domain calls from foreign domains.	DefaultAuthenticator
Deployers	Deployers can view all resource attributes and deploy applications.	DefaultAuthenticator
LoBManager		DefaultAuthenticator

4. Create New User and Group as per the needs which needs to be assigned 'Risk Manager Role'.

5. Assign the User creates to the new Group created.

6. Save the changes.

### Assigning User and Groups to Risk Manager Role

1. Log in to '**http:// <host server name or IP>:<Port No default is 7001>/em**' using your Administrator credentials created during platform install.
2. Go to Business Intelligence > coreapplication right click it and go to Security > Application Roles from the navigation tree menu.
3. There is a role "Risk Manger", edit it and add Member to it.
4. While adding the member use search type as Group and search for 'Risk Manager' and add it.

**Application Roles**

Application roles are the roles used by security aware applications that are specific to the application. There are also application roles that are created in the context of end users accessing the application.

To manage users and groups in the WebLogic Domain, use the [Oracle WebLogic Server Security](#)

**Policy Store Provider**

**Search**

Enter search keyword for role name to query roles defined by this application. Use application stripe

Application Stripe: obi

Role Name: Starts With

Buttons: Create..., Create Like..., **Edit...**, Delete...

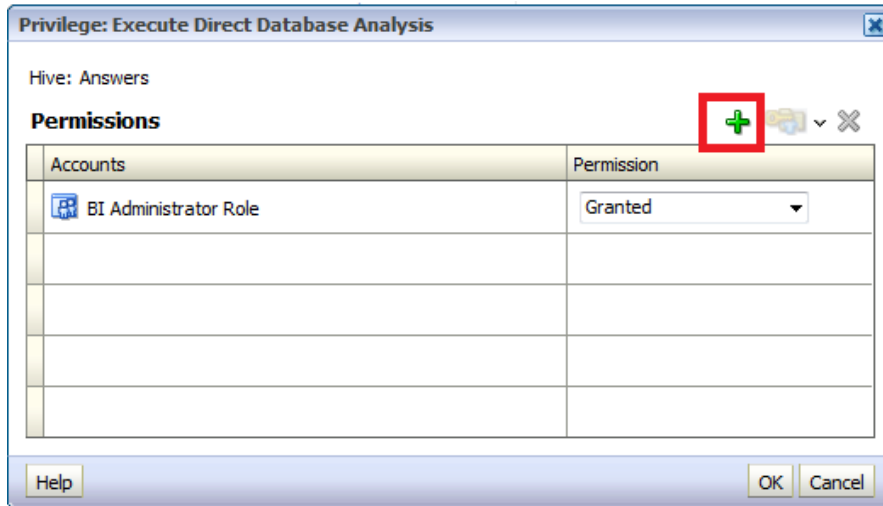
Role Name	Display Name
BISystem	BI System Role
BIAdministrator	BI Administrator Role
BIAuthor	BI Author Role
BIConsumer	BI Consumer Role
BankGlobalCFO	
Risk Manager	Risk Manager

- Go to 'http:// <host server name or IP>:<Port No default is 7001>/analytics/saw.dll? Admin' and go to **Manage Privileges** using the Weblogic credentials and then

Go to Answers>Execute Direct Database Click BI Administrator Role

<b>Answers</b>	Create Views	<a href="#">BI Author Role</a>
	Create Prompts	<a href="#">BI Author Role</a>
	Access Advanced Tab	<a href="#">BI Author Role</a>
	Edit Column Formulas	<a href="#">BI Author Role</a>
	Save Content with HTML Markup	<a href="#">BI Administrator Role</a>
	Enter XML and Logical SQL	<a href="#">BI Author Role</a>
	Edit Direct Database Analysis	<a href="#">BI Administrator Role</a>
	Create Analysis From Simple SQL	<a href="#">BI Administrator Role</a>
	Create Advanced Filters and Set Operations	<a href="#">BI Author Role</a>
	Save Filters	<a href="#">BI Author Role</a>
<b>Delivers</b>	<b>Execute Direct Database Analysis</b>	<b><a href="#">BI Administrator Role</a></b>
	Create Agents	<a href="#">BI Author Role</a>
	Publish Agents for Subscription	<a href="#">BI Author Role</a>
	Deliver Agents to Specific or Dynamically Determined Users	<a href="#">BI Administrator Role</a>
	Chain Agents	<a href="#">BI Author Role</a>
	Modify Current Subscriptions for Agents	<a href="#">BI Administrator Role</a>

- You have an option to add the Roles/Group/User. Add the 'Risk Manager Role' which will then allow access to all the BI Publisher reports as well.



#### 4.7 Testing the Analytics reports

- 1 Log in to '**http:// <host server name or IP>:<Port No default is 7001>/analytics/saw.dll?Dashboard**' using your Administrator credentials created during platform install.
- 2 Check for the reports availability.
- 3 In case of any problems check for the log files present in the respective diagnostic folders of analytics server. That is, <OBIEE Install Folder>/instances/instance1/diagnostics/logs.

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Installation Manual

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Oracle Financial Services Enterprise Stress Testing and Capital Planning Analytics v 2.0 Product

Oracle Corporation

World Headquarters

500 Oracle Parkway

Redwood Shores, CA 94065

U.S.A.

Worldwide Inquiries:

Phone: +1.650.506.7000

Fax: +1.650.506.7200

[www.oracle.com/financial\\_services/](http://www.oracle.com/financial_services/)

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