Installation Manual
Oracle Financial Services Market Risk Analytics
Release 2.5.1.0.0

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<u>Document Control</u>

Version Number	Revision Date	Changes Done
Version 2.5.1.0.0	Revised on June 2014	Updated the Environment and Generic Software section to qualify on OEL/RHEL 5.3 / 5.5, Solaris 5.10, AIX 5.3 & AIX 6.1 - Oracle 11g R2 (11.2.0.2.0) - Tomcat 7.0.19 (64 bit)/ Web logic 10.3.5.0/ Websphere 7.0.0.17, the grants for atomic schema user, and updated the snapshots.
Created and Edited by: Sindhu.K K	Reviewed By: Senthilnathan. C	Approved by :

Executive Summary

The document consists of all the installation, Pre and Post configuration procedures which have been structured considering all the 2.5.1.0.0 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 Market Risk (MR) Analytics Approach are pre-packaged on OFSAAI and are ready to install. With Oracle Financial Services (OFS) Market Risk Analytics application, Release 2.5.1.0.0, banks can now meet the requirements as stated in the accord, by catering to multiple jurisdictions with a single application, thereby eliminating the need for multiple point applications from multiple software vendors.

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 (OFS) Market Risk Analytics v2.5.1.0.0 for the first time, in the following environment:

    o With OFSAAI v7.3.3.3.0 and with OFS MR v2.5.1.0.0.
    o With OFSAAI v7.3.3.3.0 and without OFS MR v2.5.1.0.0.

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 Market Risk Analytics Release 2.5.1.0.0.

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**.

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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
- Pre-installation Activities

2.1 **Prerequisites**

- Infrastructure version 7.3.3.3.0 should be applied.

  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 JRE Standard Edition 1.6.0_25 - 64 bit - Sun JDK Standard Edition 1.6.0_25 - 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] - Sun JRE Standard Edition 1.6.0_25 - 64 bit - Sun JDK Standard Edition 1.6.0_25 - 64 bit

Type	Description
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 Suite Enterprise Edition 11.1.1.7.1(Build 130605.1300 64-bit)

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 JRE Standard Edition 1.6.0_25 - 64 bit • Sun JDK Standard Edition 1.6.0_25 - 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] • Sun JRE Standard Edition 1.6.0_25 - 64 bit • Sun JDK Standard Edition 1.6.0_25 - 64 bit

Type	Description
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 Suite Enterprise Edition 11.1.1.7.1(Build 130605.1300 64-bit)

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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
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 Suite Enterprise Edition 11.1.1.7.1(Build 130605.1300 64-bit)

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2.3   Generic Software

Type	Description
Other Software	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 8.0 / 9.0 • Microsoft Office 2007 • Client Machines – Windows XP SP3 / Windows 7 • The screen resolutions supported are 1024*768 and 1280*1024 • Adobe Reader 8.0 / 9.0 • 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   Pre-installation Activities

The following is the preinstallation checklist to ensure the readiness to start installing OFS Market Risk Analytics 2.5.1.0.0 Application:

• Customer should have an OFSAAI login user other than sysadmin or sysauth.

• Oracle Financial Services Analytical Applications Infrastructure Release 7.3.3.3.0 must be successfully installed on, AIX 5.3/6.1, RHEL 5.3 /5.8, OEL 5.3/5.8 or Sun Solaris 5.10 Server – Oracle 11g R2 (11.2.0.2.0) – Tomcat 7.0.19, Websphere 7.0.0.17 and Web logic 10.3.5.0– 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.

- Default and Temporary table space assigned to atomic schema user should be allocated with required space.

- 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:
    - o `grant create session to <ATOMIC_USER>;`
    - o `grant create VIEW to <ATOMIC_USER>;`
    - o `grant create SEQUENCE to <ATOMIC_USER>;`
    - o `grant create TABLE to <ATOMIC_USER>;`
    - o `grant create PROCEDURE to <ATOMIC_USER>;`
    - o `grant create ANY INDEX to <ATOMIC_USER>;`
    - o `grant create TRIGGER to <ATOMIC_USER>;`
    - o `grant create SYNONYM to <ATOMIC_USER>;`
    - o `grant DEBUG CONNECT SESSION to <ATOMIC_USER>;`
    - o `grant DEBUG ANY PROCEDURE to <ATOMIC_USER>;`
    - o `grant create ANY MATERIALIZED VIEW to <ATOMIC_USER>;`

- Update the server details if you are installing an OFSAAI product for the first time. Click **Server Details** under **System Configuration** in the LHS menu of the OFSAAI User Interface and update the Database Server, Application Server, and Web Server.

- Copy all the contents of the OFS MR Analytics Release 2.5.1.0.0 installer download directory to the server location (including the DataModel 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 xml:

```
<?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.

- 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_$PARAMETER to CONFIG_USER;
    - grant select on V_$PARAMETER to ATOMIC_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 if **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**.

- Execute the following scripts in the existing Configuration Schema (this is applicable only for an upgrade activity):

    - Update the ##INFODOM## to information domain name and execute the insert script in Configuration Schema.
    - INSERT INTO SETUPINFO (APPNAME, DSNID, APPVERSION, PATCHVERSION, PATCHDATE) VALUES ('MRBI','##INFODOM##', '2.5.0.0.0', '2.5.0.0.0', sysdate);

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

Note:

This release of OFS MR Analytics cannot be installed on more than one Information Domain within the same OFSAA setup.

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3. **Installing the Analytical Application**

3.1   OFS MR Analytics Release 2.5.1.0.0 Installation

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 OFS MR Analytics (MRBI) Product installer must be invoked on each of the machines that host the OFSAAI 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. Machine A will be used to install Product Application Layer components, Machine B will be used to install Product Database Layer components, and Machine C will be used to install Product Web Layer components.

Note:

This section holds applicable if OFSAAI Release 7.3.3.3.0 is installed on RHEL/OEL 5.3-5.8 / Solaris 5.10 / AIX 5.3 (ML 12) & AIX 6.1 (ML 07) - Oracle 11g R2 (11.2.0.2.0) on separate machines A, B, and C respectively.

For Silent Installation, refer to the section OFS MR Analytics Release 2.5.1.0.0 Installation- Silent Mode.

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

Step 1

To begin with the OFS MR Analytics Release 2.5.1.0.0 installation, execute **Setup.sh** with the parameter GUI (GUI Installation) or SILENT (for Silent installation).

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Step 2

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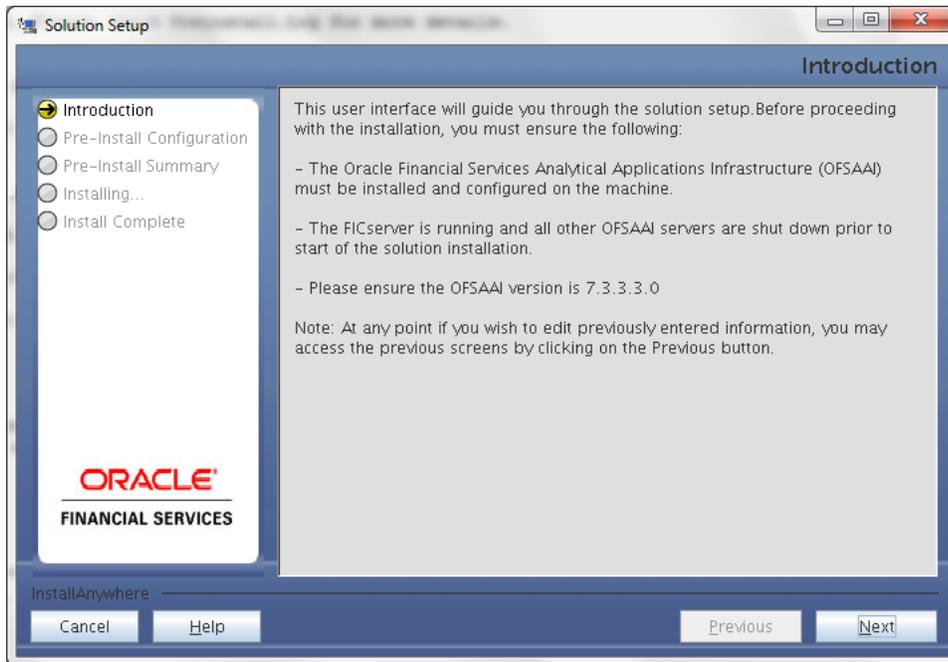
Step 3

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

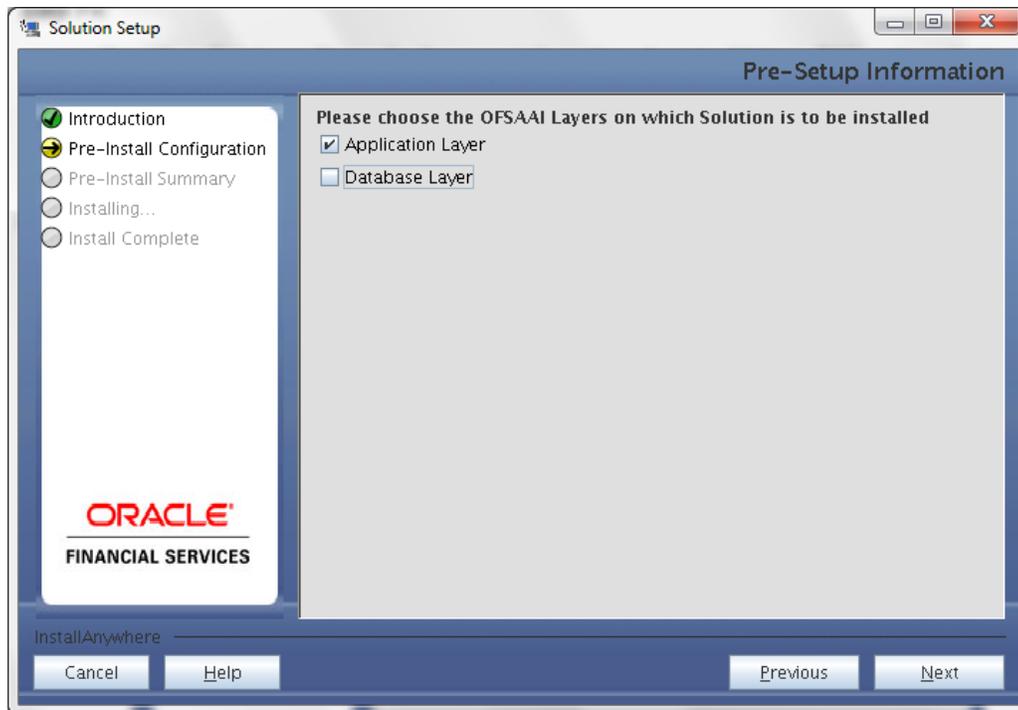Enter the Customer Identification Number and click **Next** to continue.
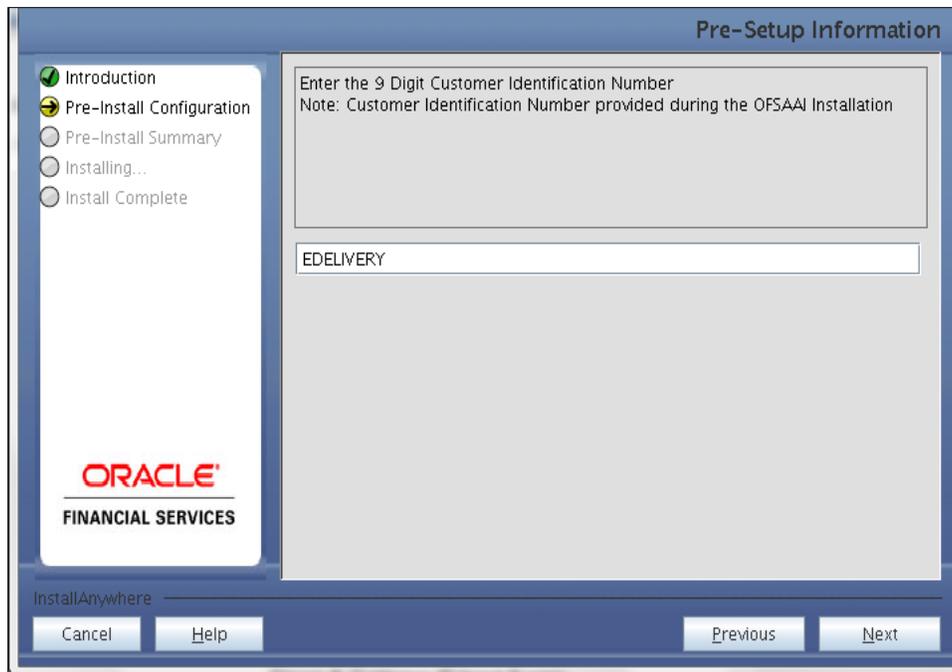
Step 5

In the next screen enter the OFSAAI User ID.

Select the appropriate OFSAAI 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 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

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.
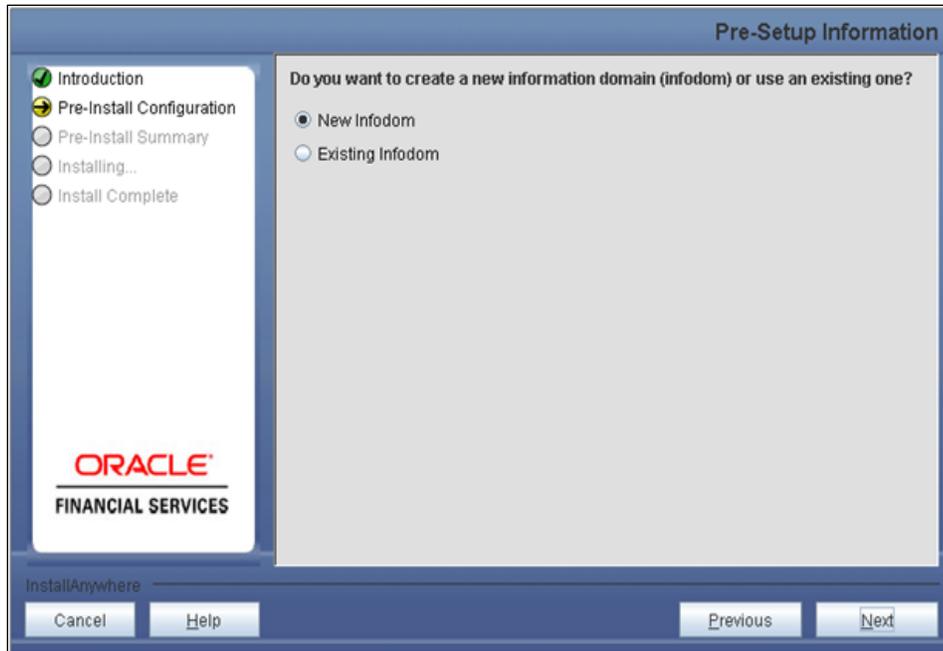
Click **Next** to continue. If **New Information Domain** is selected then go to **Step 7** or else go to **Step 8**.

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.
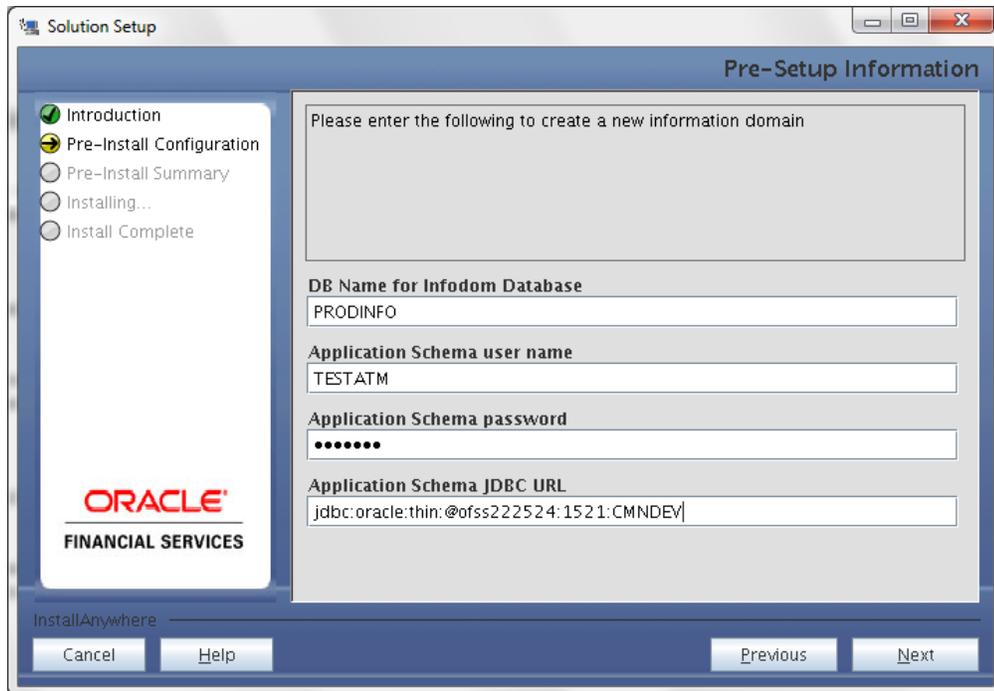
Step 7-ii

If this 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).
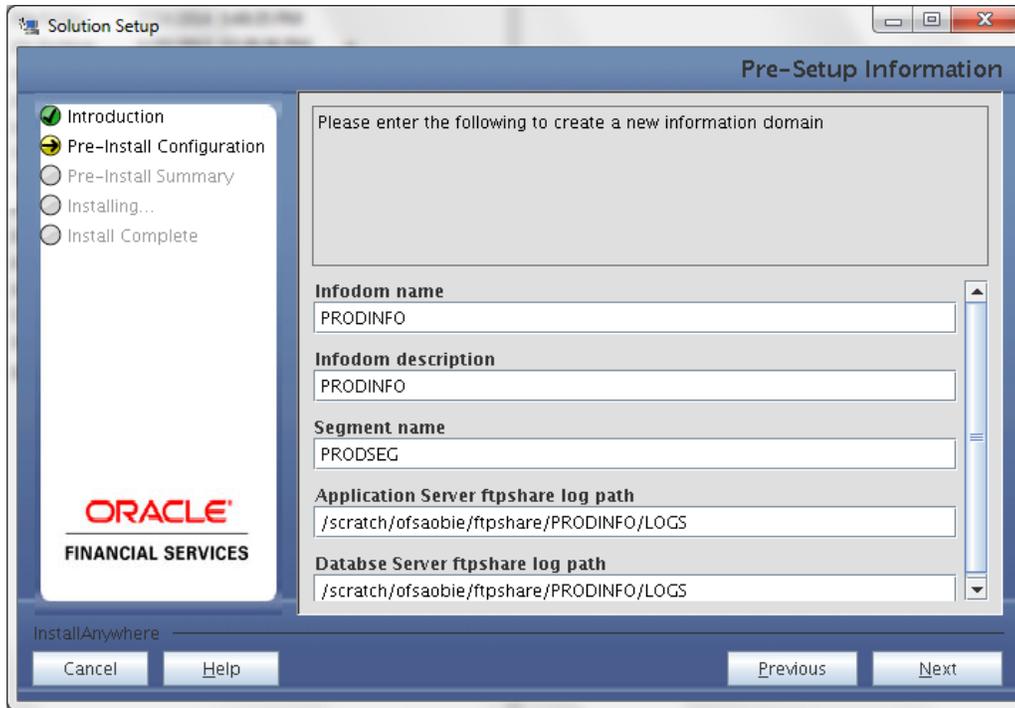
Note:

The OFSAAI user must have a role mapped to perform Add/Modify functions for OFS MR Analytics 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.
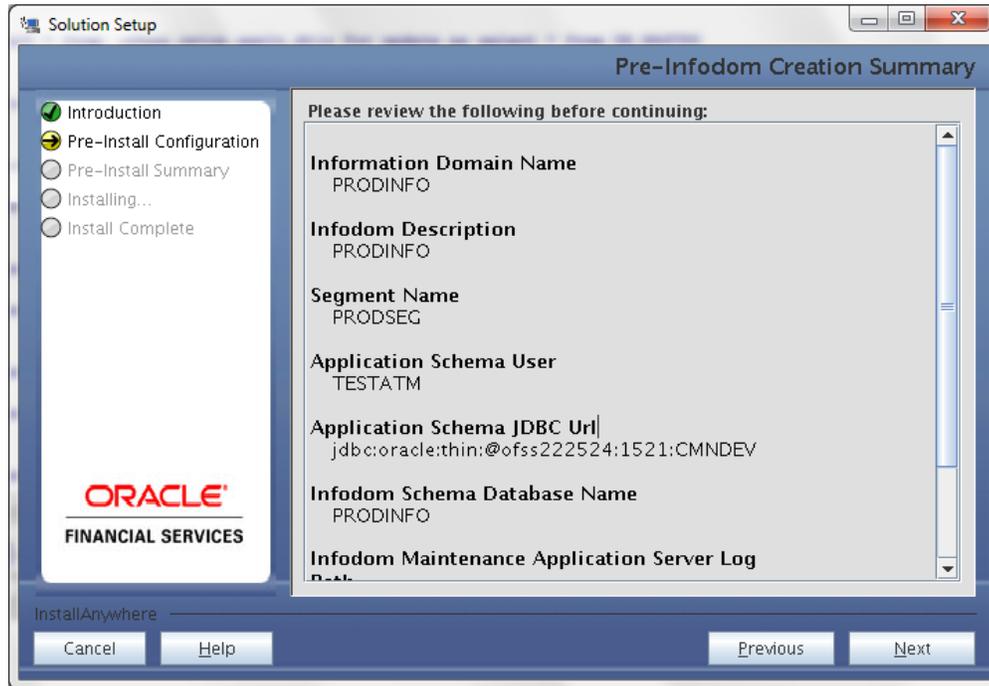
Step 8

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.

- Enter the application schema's TNS name.
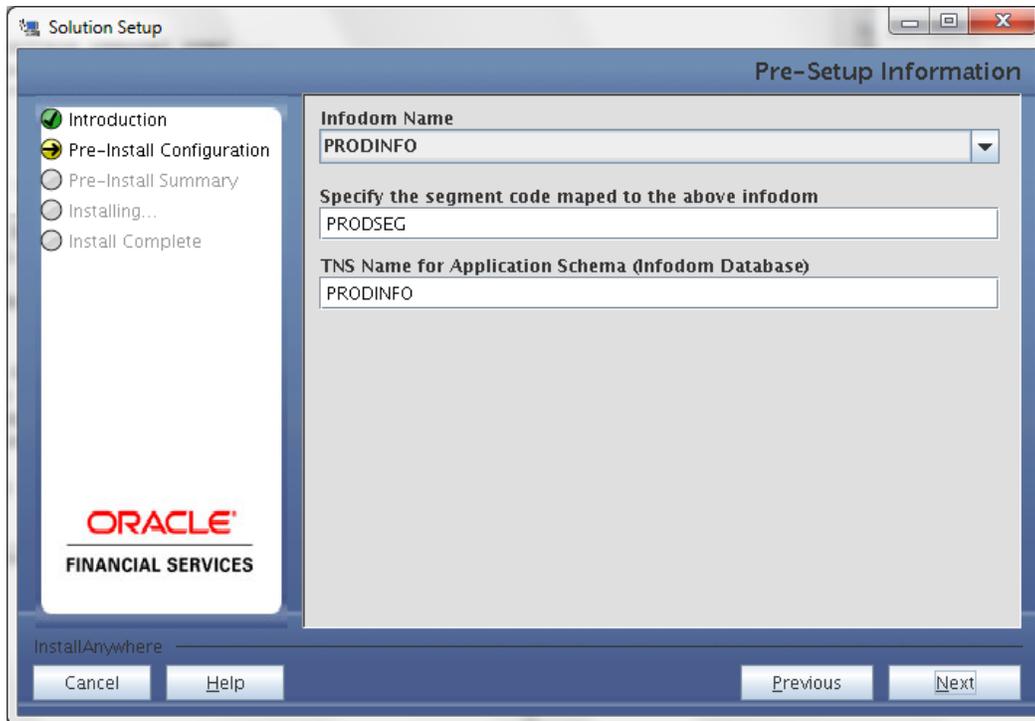
Click **Next** to continue

Step 9

OFS MR Analytics Release 2.5.1.0.0 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.
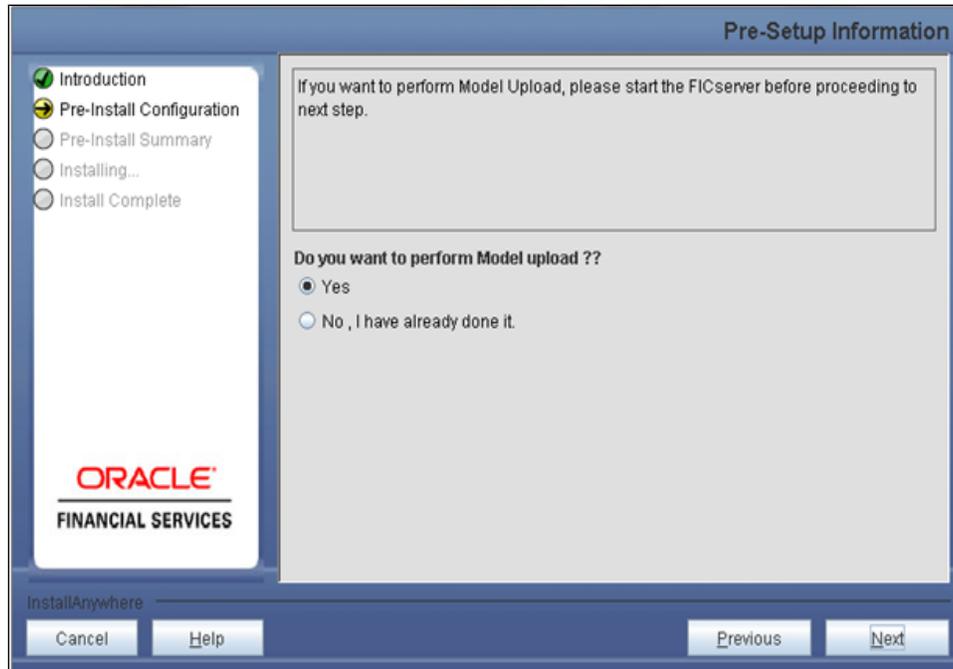
Note:

- If MR Application is already installed in the respective infodom, then, MR Analytics will skip the Datamodel upload option.

- Click **Yes** to perform Data Model upload.

- Clicking **No** implies that the OFS MR Analytics model is already uploaded. Click **Next** to proceed further.

If you select **No,** go to **Step 13**. Else, go to **Step 10**.

Step 10

In the following screen, choose **Released Datamodel** or **Customized Datamodel** to be uploaded.
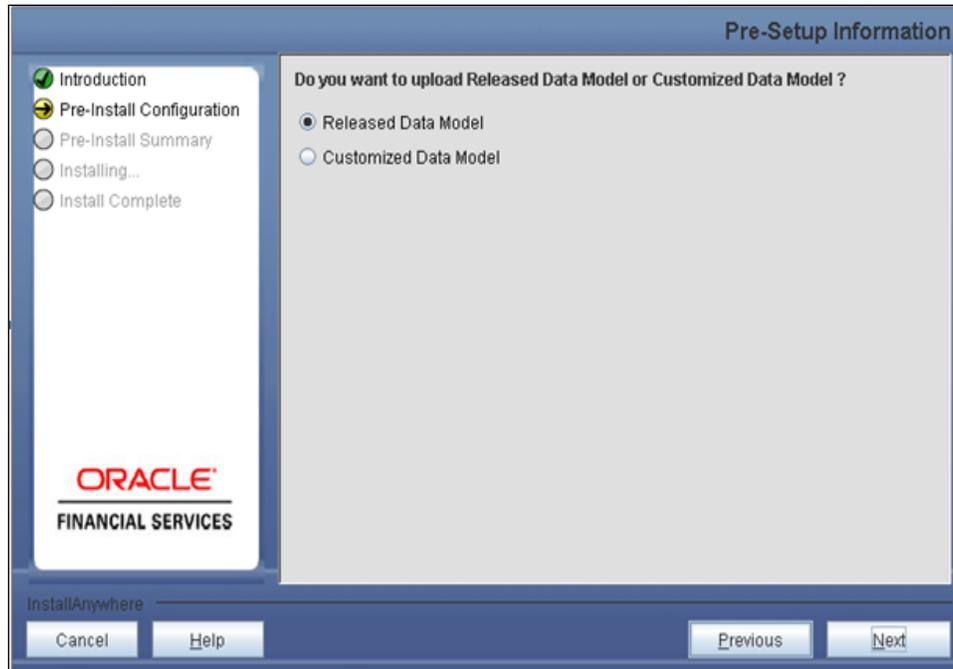
If **Released Data Model** option is selected, then the installer uploads the OFS MR Analytics Release 2.5.1.0.0 data model. If **Released Data Model** is selected go to **Step 12** Else, go to **Step 11**.

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

Click **Next** to proceed.

Step – 11

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.
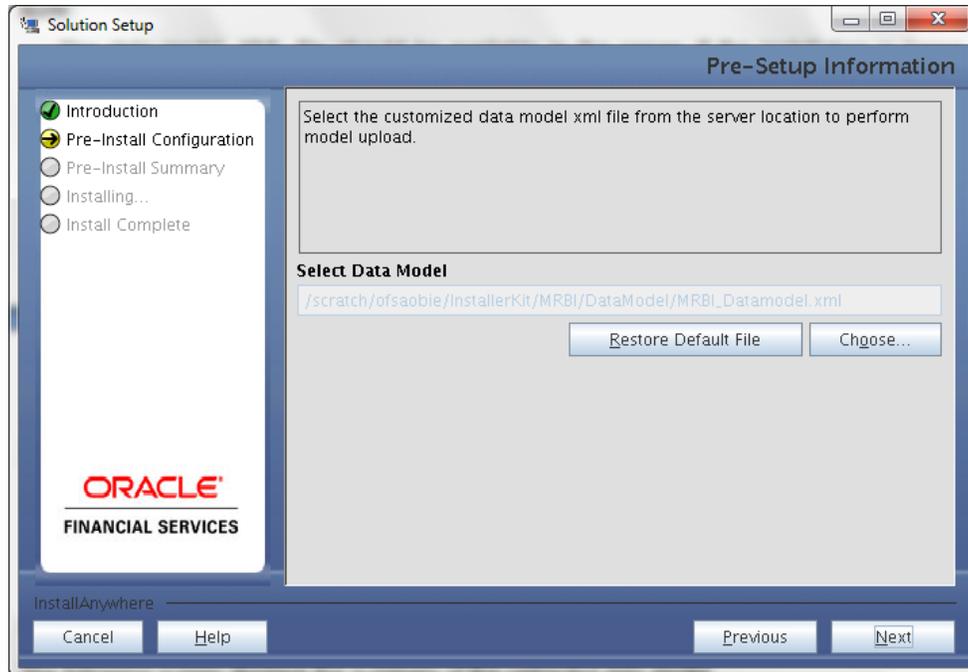
Note:

- 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 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 – 12

The following screen displays the summary of the uploaded data model:
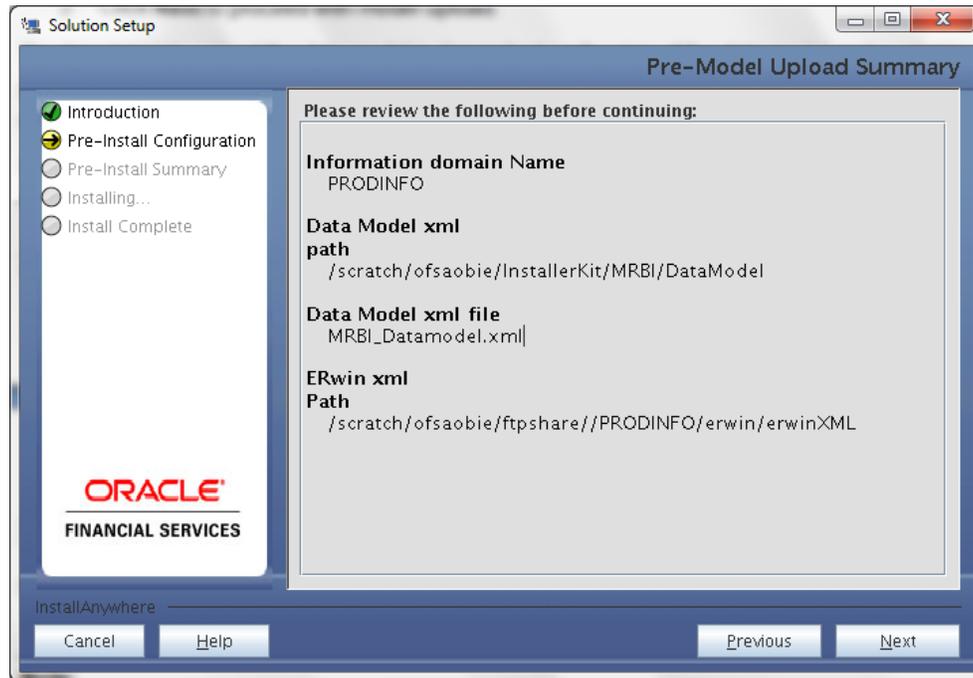
1. Verify the details before proceeding to the next step.

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.

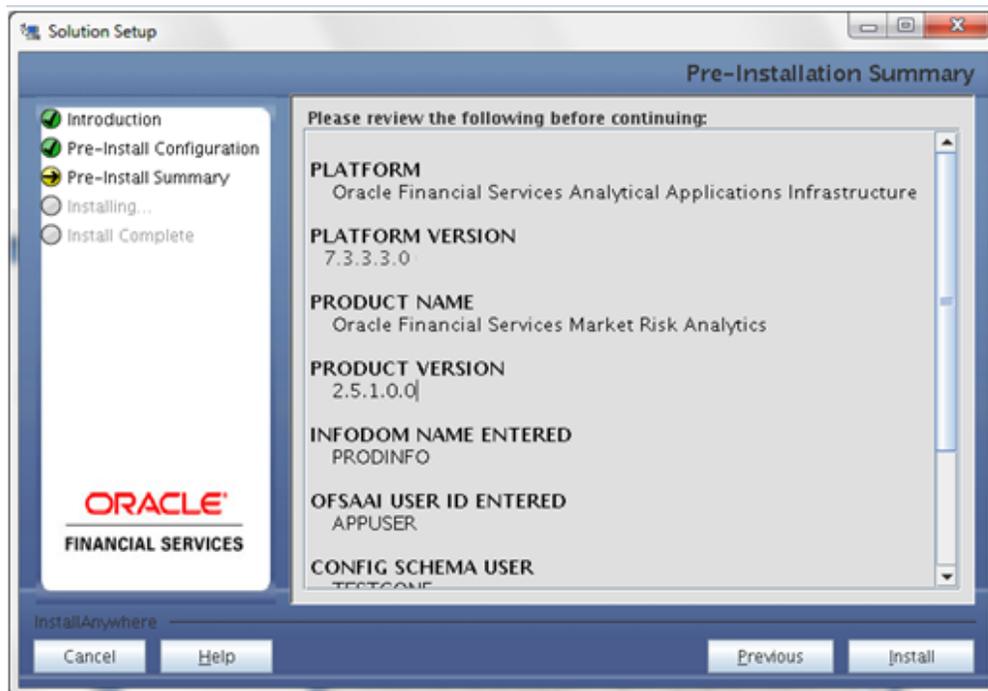 **Possible reason/resolution:**

  Restart the FICServer.

Step 13

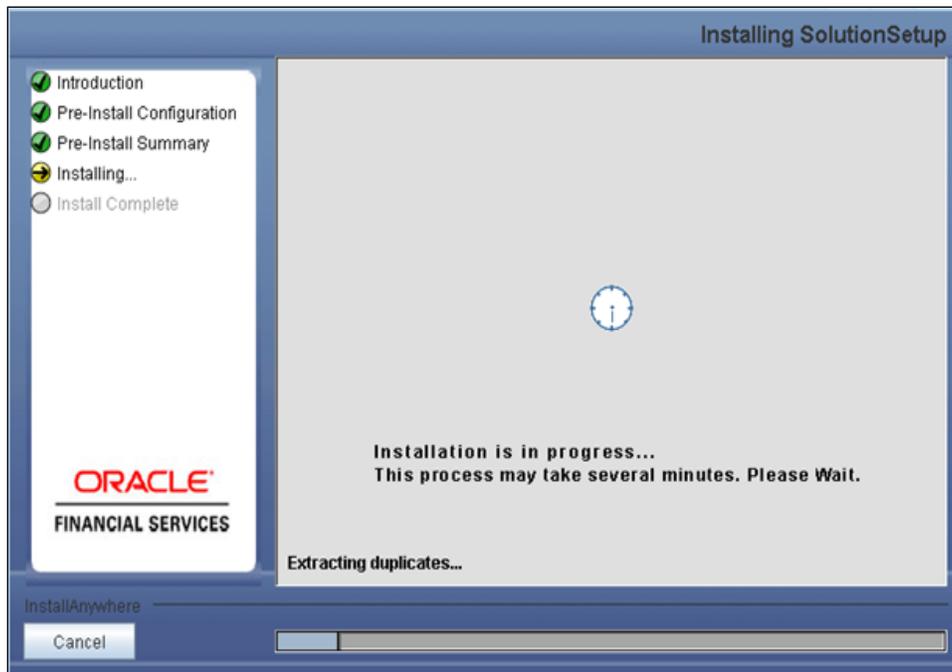Please specify the OFSAAI user id (Should be Capital letter)

.
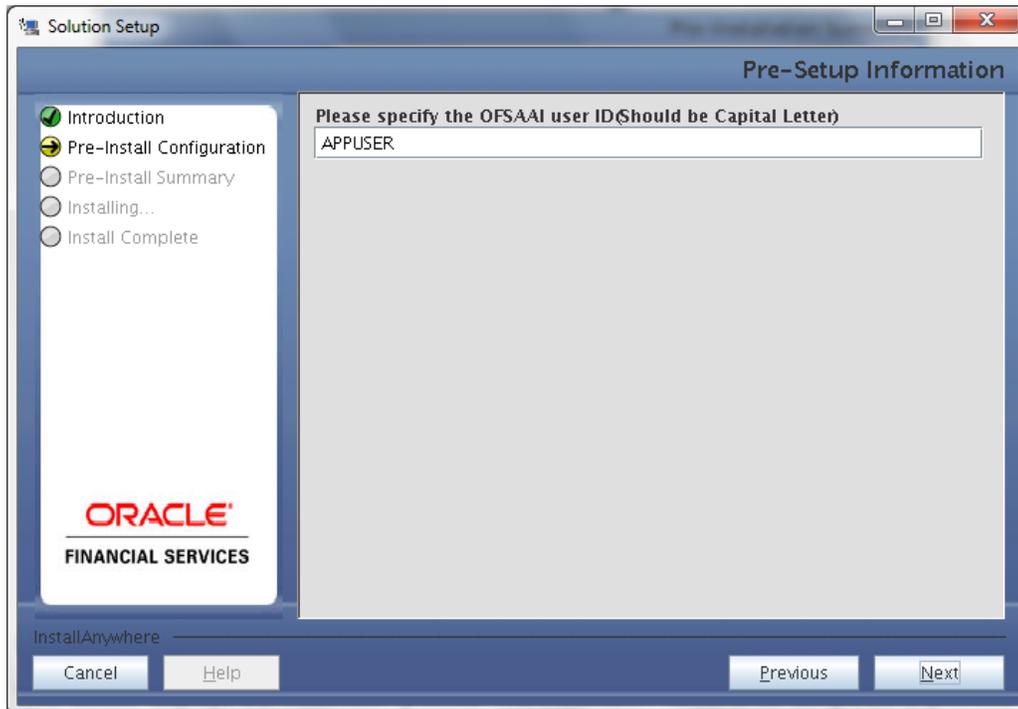
Step 14

This screen displays the preinstallation summary. Verify all details and click **Install** to proceed
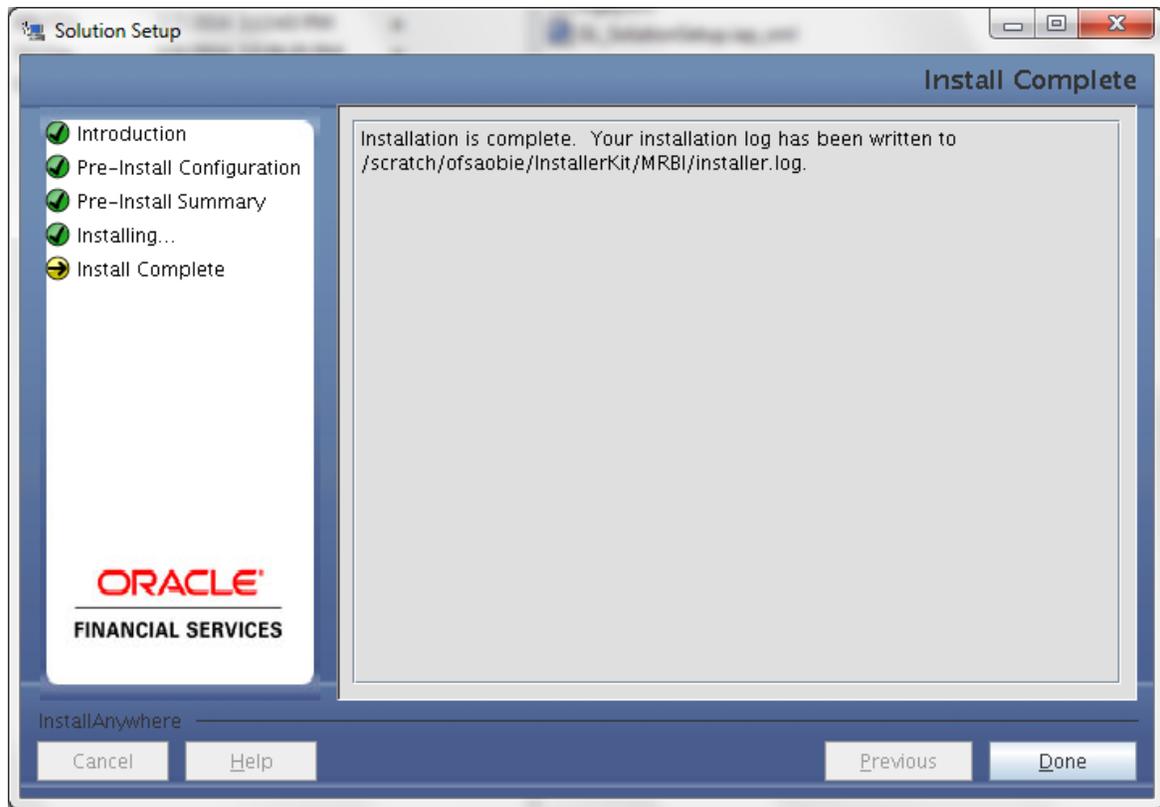
Step 15

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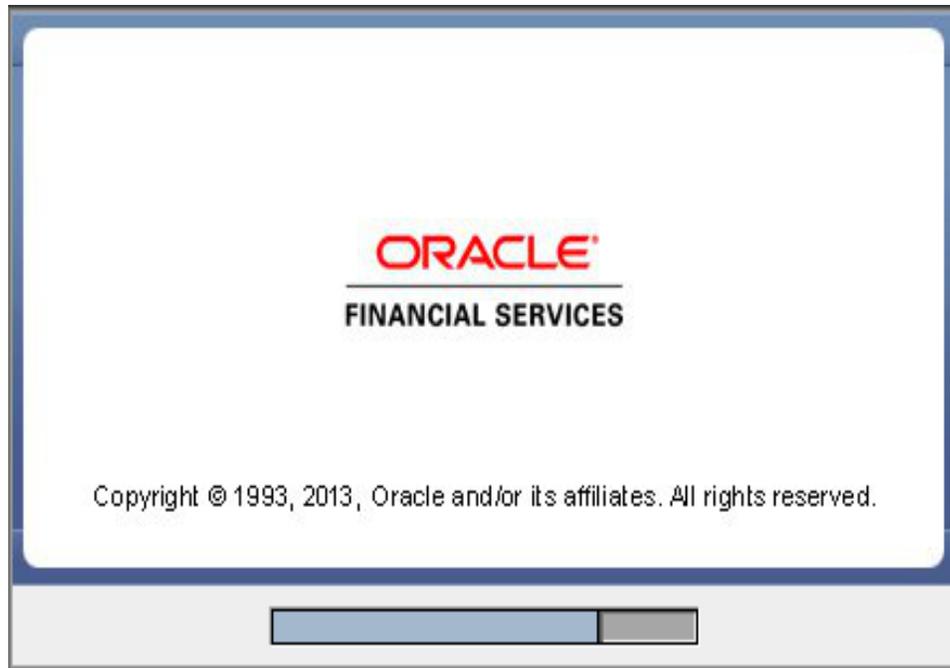

Step 16

The following screen displays the completion of installation of the OFS MR Analytics Release 2.5.1.0.0 Setup. Click **Done** to exit.

### 3.1.2   Machine B – Product Database Layer

Step 1

To begin with the Oracle Financial Services MR Analytics Release 2.5.1.0.0 installation, execute **Setup.sh** with the parameter GUI (GUI Installation) or SILENT (for Silent installation).

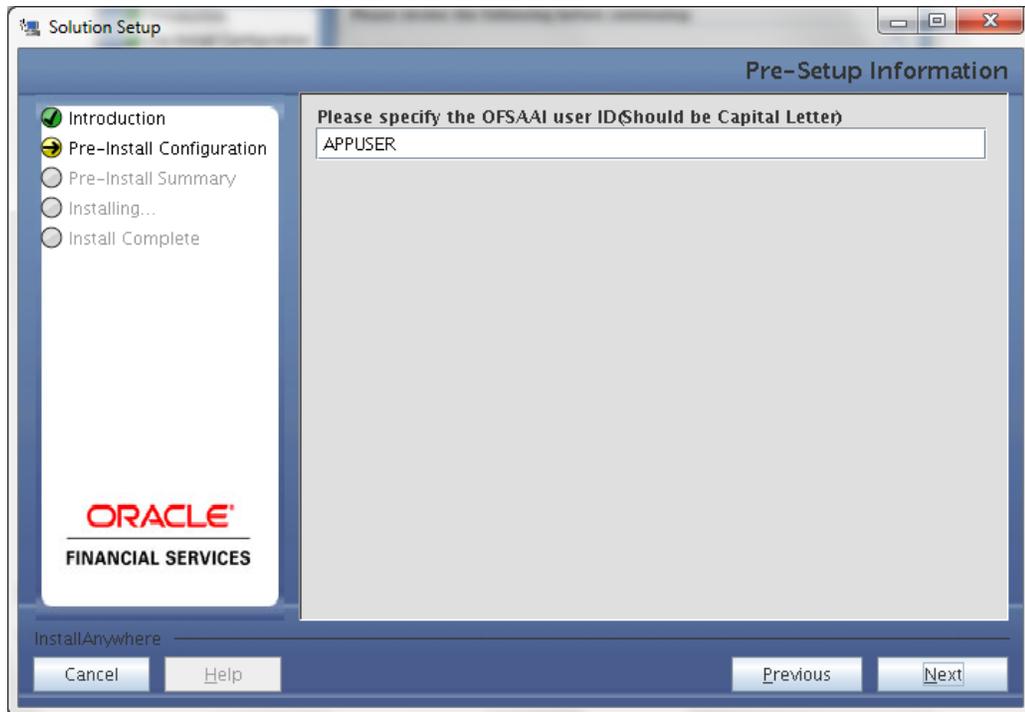Repeat **Step 2 - Step 5** as mentioned in Machine A – Product Application Layer.

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.
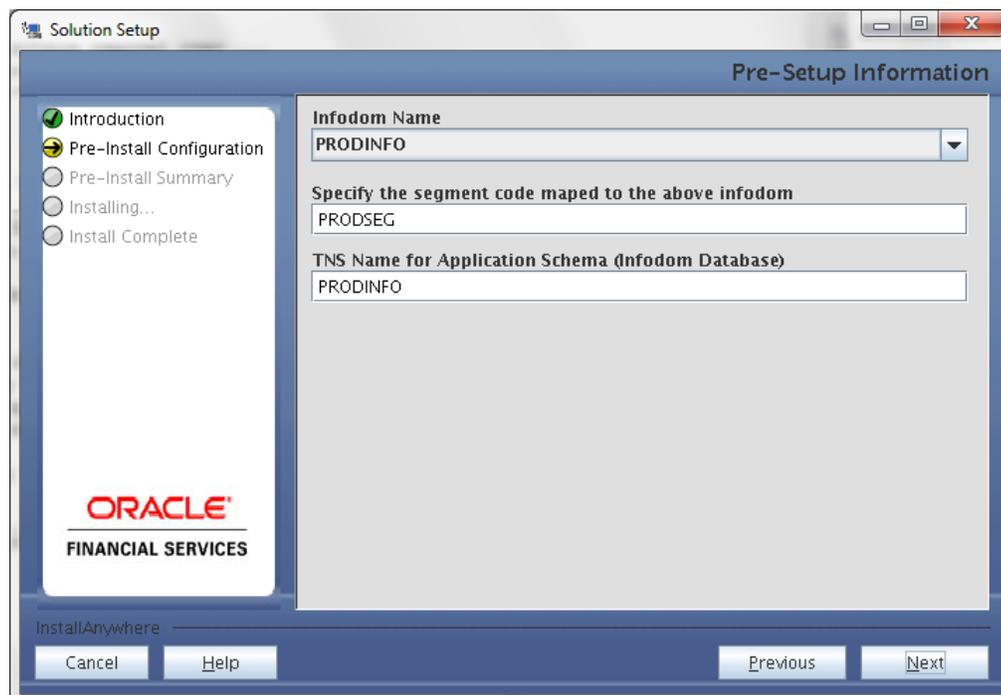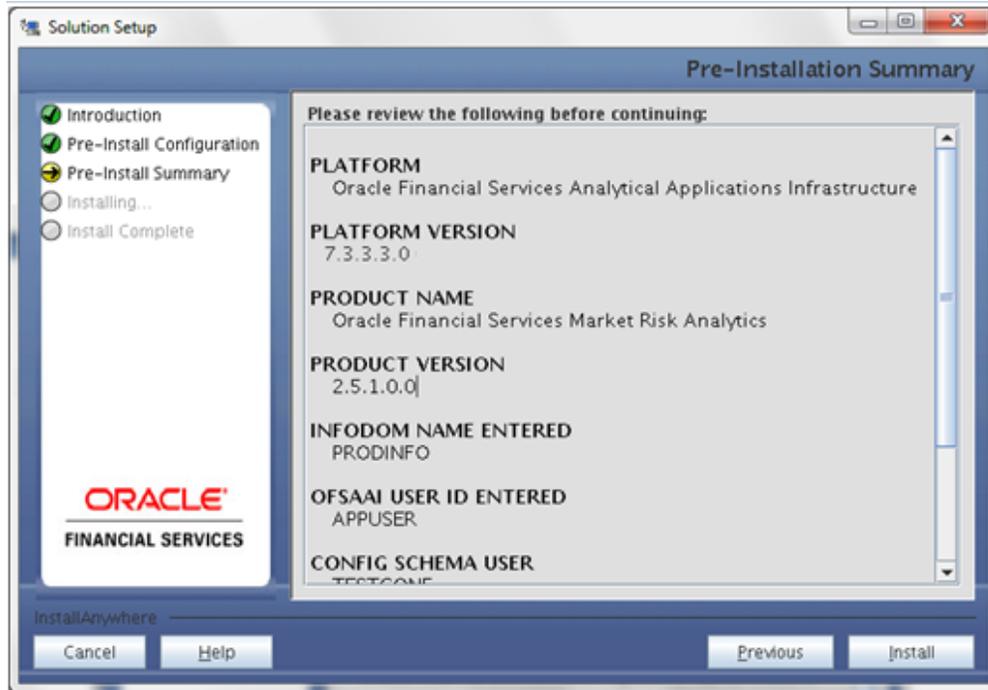
Step 7

Please specify the OFSAAI user id (Should be Capital letter)
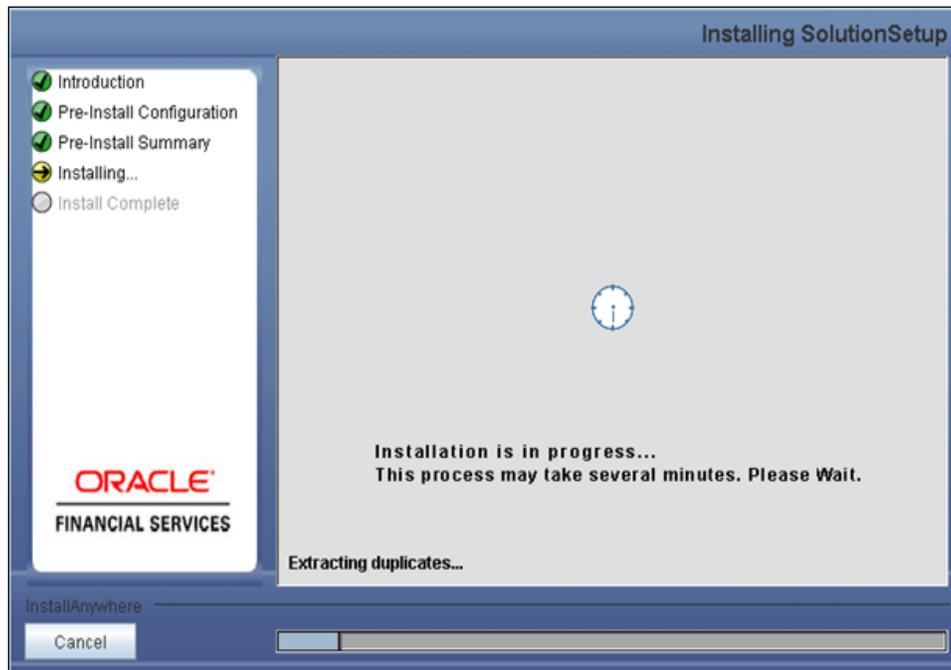

Step 8

This screen summarizes the preinstallation details. Verify all the details and proceed.
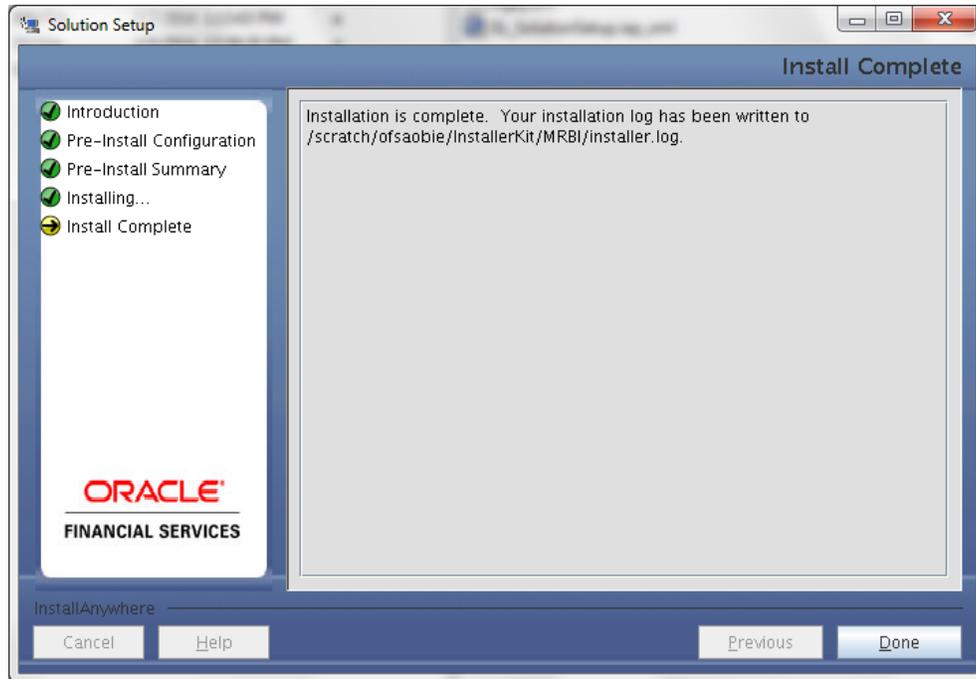
Click **Install** to proceed.

Step 9

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

Step 10

The following screen prompt displays the completion of installation of the OFS MR Analytics Release 2.5.1.0.0 setup.

Click **Done** to exit.

3.2   OFS MR Analytics Release 2.5.1.0.0 Installation- Silent Mode

Silent installation is achieved through 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

1.   The installer folder contains a template file **Silent.template**.

2.   Create a copy of this file and rename the copy as **Silent.props**.

3.   Edit the file **Silent.props** and specify the parameters as per the requirements.

4.   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 attached file, lists all the properties that need to be specified:

Silent.Properties.xlsx

Note:

- Ignore the following errors in the Installer log(either for GUI or Silent):

    o   *ORA-00001: unique constraint violated*

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

3.3   Pre-Upgrade Activities

This section is applicable for users upgrading from OFS MR Analytics version 2.5.0.0.0 (MR Analytics 2.5) to OFS MR Analytics version 2.5.1.0.0 (MR Analytics 2.5.1).

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.

3.3.1   *Upgrade Activities from OFS MR ANALYTICS 2.5 to 2.5.1*

The following steps need to be performed by the user before proceeding with installation.

Data Model Changes

If the Data Model is not customized, then the atomic scripts are executed followed by the upgrade installer. The new RPD and Catalog needs to be deployed manually.

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 MR Data model on Left Model, in the Compare window.

4. Select the extracted MR 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 MR_Datamodel-2.5-2.5.1_changes.xls file. These are the changes from MR Analytics 2.5 to MR Analytics 2.5.1 upgrade.

    MR_Datamodel_Diff_
    2.5_2.5.1.xls

8. Click "**Finish**".

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

> Example: mr_analytics_Datamodel.xml

Upgrade in a Customized Environment

The key points that need to be considered for upgrades in a customized environment are as follows:

- In cases of addition to primary key or not null column additions, data of these tables will be backed up and deleted.

- If there was any addition or change in the out of box seeded data, which clashes with the primary key of the new version, then this can lead to conflict of the data due to unique constraints. This will eventually halt the normal functioning of the application.

- All DB objects modified will be over written with the new code and any customizations will be lost.

- As part of data migration, only the columns which are available as part of the out of box data model will be migrated. The remaining will not be restored.

3.4   Post Installation Activities

Once the installation of OFS MR Analytics Release 2.5.1.0.0 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 infodom. *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.

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

- Clear webserver cache. For more information on clearing cache, refer Clearing Application

Cache section in the *OFSAAI Installation and Configuration Guide*.

- 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

  /

- Start all OFSAAI Servers.

- Refer Start Infrastructure section in the *OFSAAI 7.3.0.0.0 Installation manual* for assistance in starting the servers.

- Recompile all the functions, procedures and views.

- If you are installing Oracle Financial Services Market Risk Release 2.5.1.0.0 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 other metadata and all the Hierarchies after populating the set up data and executing the SCD batch.

- Copy the Repository, Images, and Catalog file from the $FIC_HOME/MRBI/ and place it in the Repository folder where OBIEE is installed.

The Oracle Financial Services Market Risk Analytics Release 2.5.1.0.0 application is now ready to be used.

If you encounter any problems during setup, contact Oracle Support

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4. **OFS Market Risk v2.5.1.0.0 Analytics Configuration**

4.1 Introduction

4.1.1 Assumptions

- The database schema will have proper privileges namely: `CONNECT, RESOURCE AND CREATE MATERIALIZED VIEW`, to execute the above mentioned scripts.
- OBIEE 11.1.1.7.1 Server for the respective operating system is installed
- Administrator knows how to start/shutdown the OBIEE servers namely;
  - o Weblogic Server
  - o Oracle BI Server
  - o Oracle BI Presentation Server
  - o Oracle BI Java Host
- Administrator knows the OBIEE installation path

4.2 Pre-requisites

a. Backup following OBIEE folders (*for existing installation, not required for 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>

b. Server details i.e. url of OBIEE should be kept in handy

c. Copy following files from the release kit to the local machine:

- $FIC_HOME/MRBI/catalog/OFS Market Risk Analytics 2.5.1.0.0- Answers and $FIC_HOME/MRBI/catalog/OFS Market Risk Analytics 2.5.1.0.0- Dashboards; this has the archive for Answer (report) and dashboard related files. Do not unzip this file, as this file is not a zip file.
- $FIC_HOME/MRBI/repository/OFS Market Risk Analytics 2.5.1.0.0- Repository.zip; this has the "MarketRisk_2.5.1.0.0.rpd" file. Unzip this file in the local machine.

4.3 Installation Steps

4.3.1 Server Configuration steps (for each release confirm that the following has been setup):

a. Stop the BI servers

b. Log on to Oracle Enterprise Manager.

    i. Go to Business Intelligence menu located on the left hand side of the screen. Select **Core application** within it.

    ii. Go to **Deployment** located on the last tab.

    iii. Click **Lock and Edit Configuration**

    iv. Go 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 "Administrator1".

    vii. Click **Apply**.

    viii. Go to BI Presentation Catalog section

    ix. Provide the path of the new catalog

    x. Click **Activate Changes.**

    xi. Click the **Overview** tab

    xii. Click **Restart**.
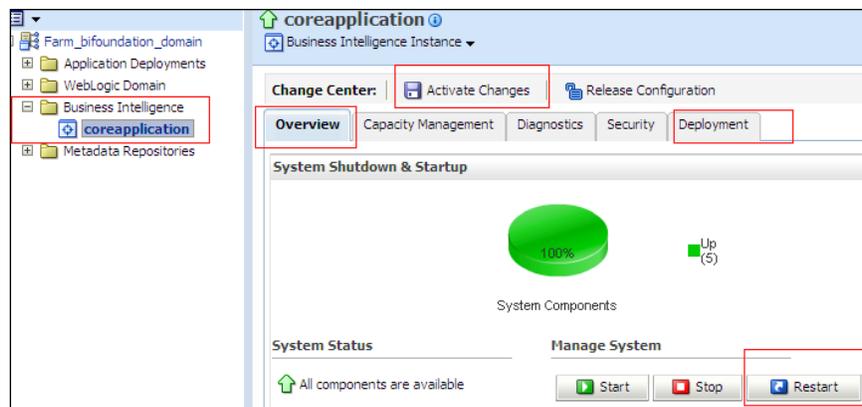
    i. Confirm to restart all opmn services.

    ii. Edit the **NQSConfig.INI** file, found at *<Installation Path>\instances\instance1\config\OracleBIServerComponent\coreapplication_obis1* to reset the FMW_UPDATE_ROLE_AND_USER_REF_GUIDS = NO to YES.

    iii. Add the tag <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs> in the **instanceconfig.xml** under the tag **<Catalog>**, found at *<Installation Path>\instances\instance1\config\OracleBIPresentationServicesComponent* and restart all opmn services.

iv. Check if all the servers are up and running (except Presentation Service).

v. Edit the **NQSConfig.INI** file, found at *<Installation Path>\instances\instance1\config\OracleBIServerComponent\coreapplic ation_obis1* to reset the FMW_UPDATE_ROLE_AND_USER_REF_GUIDS = YES to NO.

Set EVALUATE_SUPPORT_LEVEL=2 from EVALUATE_SUPPORT_LEVEL=0 and save.

vi. Remove the tag <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs> in the **instanceconfig.xml** under the tag **<Catalog>**, found at *<Installation Path>\instances\instance1\config\OracleBIPresentationServicesCompo nent*.

vii. Restart all opmn services.

viii. 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 on the "Capacity Management" tab in the Oracle Enterprise Manager. Select "Performance" tab within it. Click 'Lock and Edit Configuration' button. Un-check the option "Cache enabled". Click on Activate Changes. Restart the servers to activate changes. Refer to the image below.
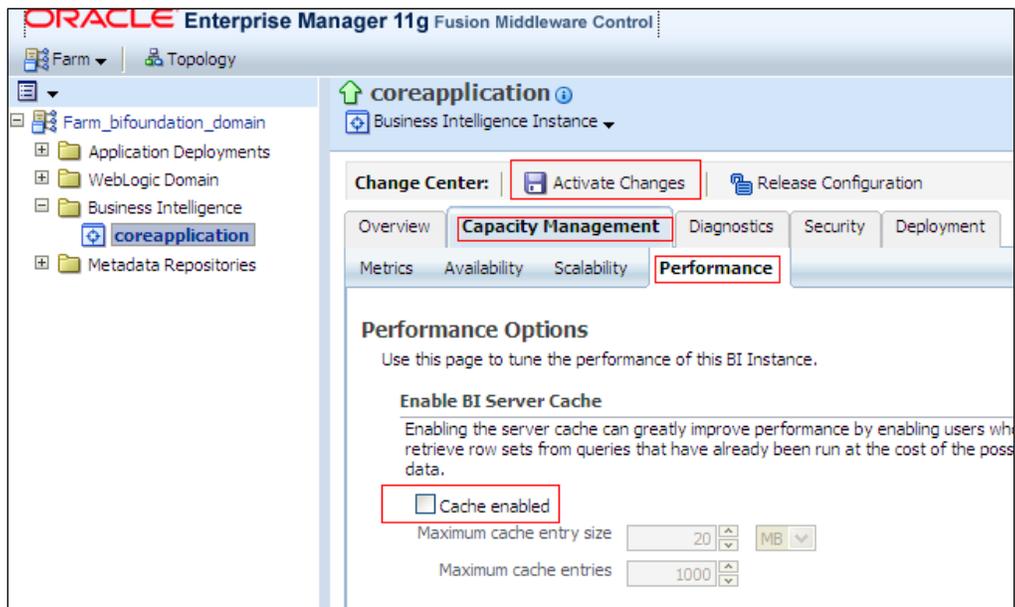
c. Open the RPD by clicking on start menu > All Programs > Oracle Business Intelligence > BI Administration
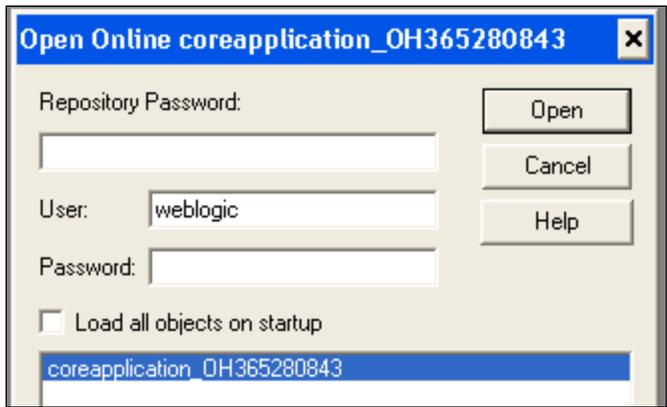
d. Provide the User as "weblogic" and enter the password. Provide the Repository Password as "Administrator1".

e. Double click "Connection Pool MR" in the physical layer of the RPD as shown in the diagram below:
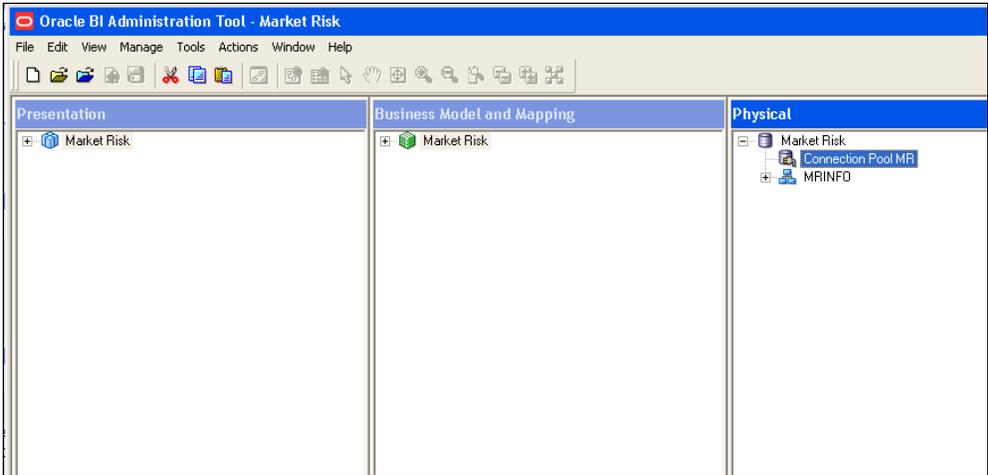
Note:

When the Oracle BI Server is running on Linux or UNIX and you need to update database object settings (such as the database type) or connection pool settings, you can copy the repository file to a Windows computer, make the changes using the Administration Tool on Windows, and then copy the repository file back to the Linux or UNIX computer.

f. 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.
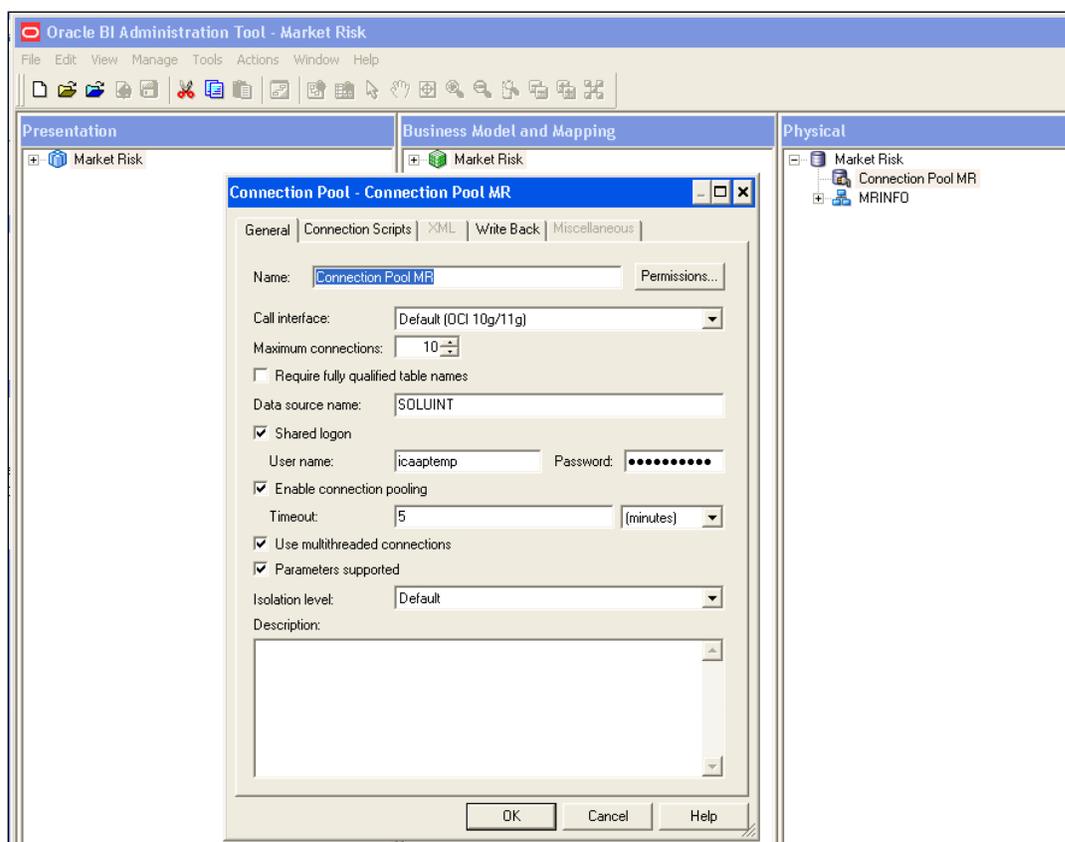
Note:

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.

---

      g. Close the RPD after saving it.

      h. Create a folder named **"Market Risk"** (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**)

      i. Start the following BI services (if not started) :

4.3.2 Dashboard/Answer Reports (from any client machine i.e. windows machine):

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

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

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

      d. Select the option *"Online"* for Type.

---

e. Type the link for presentation services i.e. Oracle Interactive Dashboard link. for e.g. *(http://URL:9704/analytics/saw.dll)*

f. Give the Administrator user Id and password, and click on **OK** button

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 Market Risk Analytics 2.5.1.0.0- Dashboards"* copied onto the local machine as part of introduction pre-requisite step, and click **OK.**

j. Create a folder *"Answers"* under *"shared folder"* (Do not recreate, if created)

k. Click the "Answers" folder and un-archive the file *"OFS Market Risk Analytics 2.5.1.0.0- Answers"* (sent as release) and click on **OK**.

l. Re-Start (stop and start) the BI services.

4.4 Post-installation verification steps

a. Log into Analytics and check if the screen looks like the diagram shown below
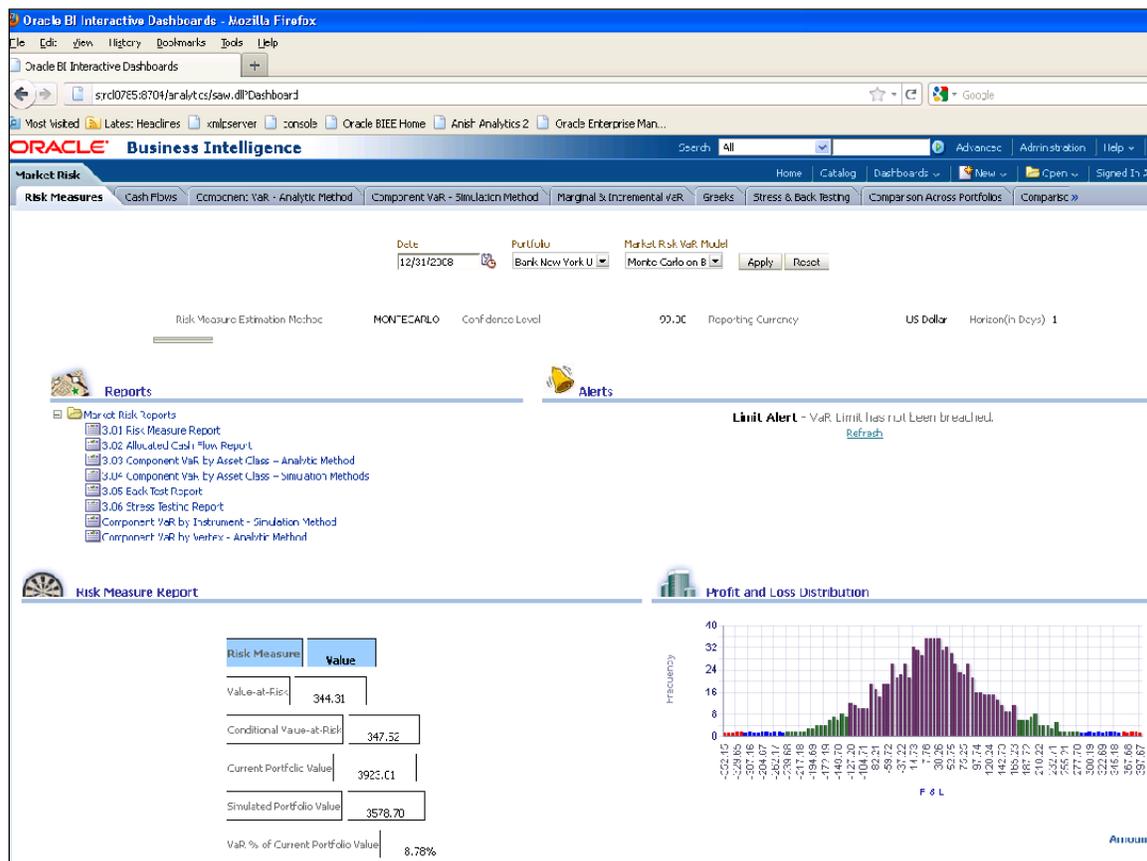
b. Click each of the dashboard links, and check if all the links are visible

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

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