Installation Manual
Oracle Financial Services Retail Portfolio Risk Models and Pooling
Release 3.4.1.0.0
April 2014

Document Control

Version Number	Revision Date	Changes Done
Version 3.4.1	Revised on April 2014	Updated the Environment and Generic Software section to qualify on OEL/RHEL 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)
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Executive Summary

The document consists of all the installation, Pre and Post configuration procedures which have been structured considering all the 3.4.1 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

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

Oracle Financial Services Retail Portfolio Risk Models and Pooling (Retail Pooling) v3.4.1.0.0 product uses modeling techniques available in Oracle Financial Services Modeling Framework. The product restricts itself to the following operation: Sandbox (Dataset) Creation, RP Variable Management, Variable Reduction, and Clustering Model for Pool Creation.

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

This manual provides a step-wise instruction to install the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0, in an existing OFSAAI v7.3.3.3.0 Platform hosted on AIX 5.3/6.1, RHEL 5.3/5.8, OEL 5.3/5.8 or Sun Solaris 5.10 Server – Oracle Business Intelligence Suite Enterprise Edition 11.1.1.5.0 - 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.

1.5 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 Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0.
- 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 Retail Portfolio Risk Models

and Pooling Release 3.4.1.0.0.

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

- Options and buttons are displayed in Bold.
- Notes are displayed as follows:

NOTE:

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

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.

2.1 Prerequisites

- Infrastructure version 7.3.3.3.0 and the below patches should be applied.
    - Bug 18305735
    - Bug 18357346

  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
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.

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

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
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.

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.

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 Oracle Financial Services Analytical Applications:

- 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.
- The Information Domain schema makes use of the tables from the configuration schema. To create a new infodom, execute the file "<Infrastructure Database Layer Install Directory>/config_table_privileges_for_atomic_user.sql" from the Infrastructure config database before creating the new infodom. These Privileges should be given to Production Schema and Sandbox Schemas (essentially all the Atomic schemas).
- The following grants must be given to atomic and sandbox schema user:
    - grant create session 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 any index to <<ATOMIC_USER>>
    - grant create trigger to <<ATOMIC_USER>>
    - grant create synonym to <<ATOMIC_USER>>
    - grant debug connect session to <<ATOMIC_USER>>
    - grant debug any procedure to <<ATOMIC_USER>>
- Copy all the contents of the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 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 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="[Log Path Here]"/>
<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;
    - grant select on V_$PARAMETER to &sandbox_db_user;
- Execute the below insert scripts in the existing Configuration Schema (this is applicable only for an upgrade activity)

NOTE:

Replace the ##PROD_INFODOM## to production information domain name and ##SAND_INFODOM## to sandbox information domain name in the below query.

INSERT INTO CONFIGURATION (PARAMNAME, PARAMVALUE, DESCRIPTION)VALUES('RP_##PROD_INFODOM##_RPSAND','##SAND_INFODOM##' , ' Sandbox dsnid(RPSANDBOX) mapped to production infodom').

2.5 Pre-Upgrade Activities

This section is applicable only for users upgrading from Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4 to Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0.

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.

Pre-Model steps:

1) Delete scripts for specific metadata objects that have an impact on the columns being dropped by the application. This will be executed by the installer as a pre-model upload step.

2) Data backup scripts for the application related tables are executed as part of pre-model upload scripts. The data is deleted from the back up tables. The installer executes these scripts.

3) Drop all the tables which were created using scripts in Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4 and which are a part of the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 data model. Pre model scripts include drop statements for these tables.

4) Delete scripts for the metadata, which has been updated or deleted. This will be executed as part of the pre-model upload scripts.

5) Installer will ignore the ORA errors specific to “table already exists” and “table or view doesn’t exist” while executing the Pre-Model Scripts.

Upgrade from Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4

The following steps are applicable for customers upgrading from Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.0.0.0. You need to perform these steps before proceeding with installation.

In upgrade platform, metadata needs to be migrated to support multiple languages. Please refer to *OFSAAI_Administration_Guide.pdf, Section 1.9 Multiple Language Support (MLS) Utility* for additional information.

Database changes

1) Create a backup of the table rev_etl_mapping in the config schema.

   Create table rev_etl_mapping_34 as select * from rev_etl_mapping;

2) Execute the following scripts in the Config Schema. Data into this table is related to mapping information.

   delete from rev_etl_mapping;
   commit;

T2T changes

The existing T2Ts will be replaced during upgrade installation. Hence, take a backup of existing T2Ts.

The T2T definitions are present in the following folders:
<FTPSHARE_PATH>/STAGE
<FTPSHARE_PATH>/<INFODOM>/erwin/sources

NOTE:

No new T2Ts definition in Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0.

If any customizations were done on the earlier T2T's, then it needs to be done again on these T2T definitions.

Data Model Changes

If Data model is not customized, following steps will be done by the upgrade installer.

1) Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 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 Oracle Financial Services Retail Portfolio Risk Models and Pooling on Left Model, in the Compare window.
4. Select the extracted Oracle Financial Services Retail Portfolio Risk Models and Pooling 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 RP file name OFS RPRM and Pooling 3.4-3.4.1_Data Model Changes.xls.
8. Click "**Finish**" and click “**Close**”.
9. Save the file as XML in "**AllFusion Repository Format**".

   Example: RP_Datamodel.xml

OFS RPRM and
Pooling 3.4-3.4.1_Da

The metadata and the PR2 objects that were available in Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4 and not used in any segments of Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 are deleted during the pre upgrade process.

3. Installing the Analytical Application

3.1 OFS Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 Installation

The Oracle Financial Services Analytical Applications Infrastructure comprises of components that are installed in Web, Application and Database layer. Hence, if you have installed Oracle Financial Services Analytical Applications Infrastructure Release 7.3.3.3.0 in a multitier architecture, the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 installer must be loaded 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 loaded only once on the machine that hosts all the Oracle Financial Services Analytical Applications Infrastructure tiers.

This section describes the installation process in which the two 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

NOTE:

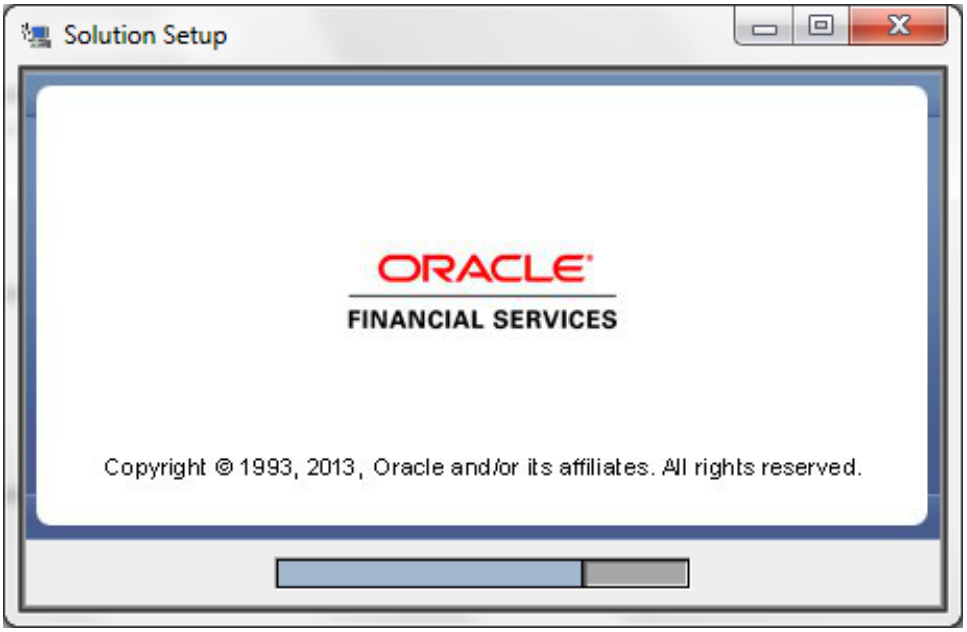
This section holds applicable if Oracle Financial Services Analytical Applications Infrastructure Release 7.3.3.3.0 is installed on AIX 5.3/6.1, RHEL 5.3 /5.8, OEL 5.3/5.8 or Sun Solaris 5.10 Server - Oracle 11g on separate machines A and B respectively.

For Silent Installation, refer to the section Silent Installation.

3.1.1 Machine A – Product Application Layer

Step 1

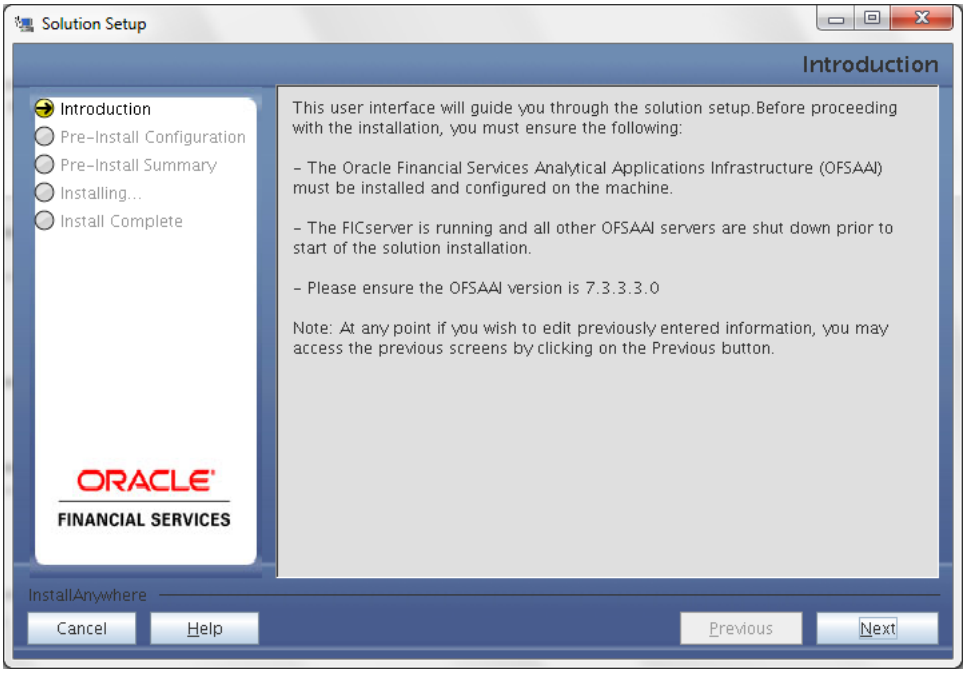
To begin with the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 installation, execute **Setup.sh** with the parameter GUI (GUI Installation) or SILENT (for Silent installation).



Installation Splash Screen

Step 2

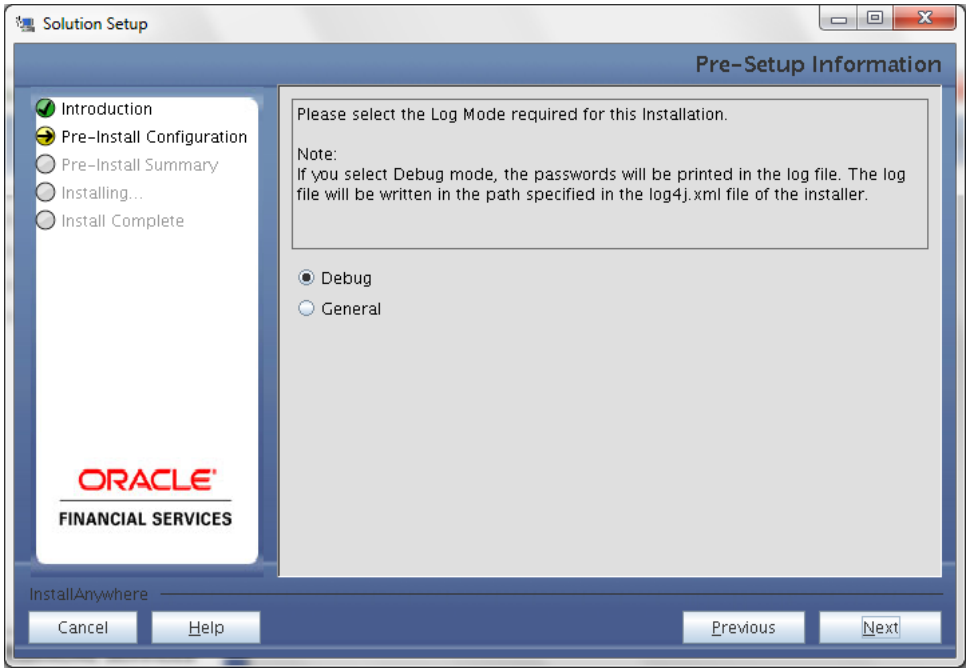
Upon loading the installer, the **Introduction** screen displays the prerequisites for installation. Ensure that these prerequisites are met before you proceed



Introduction Screen

Step 3

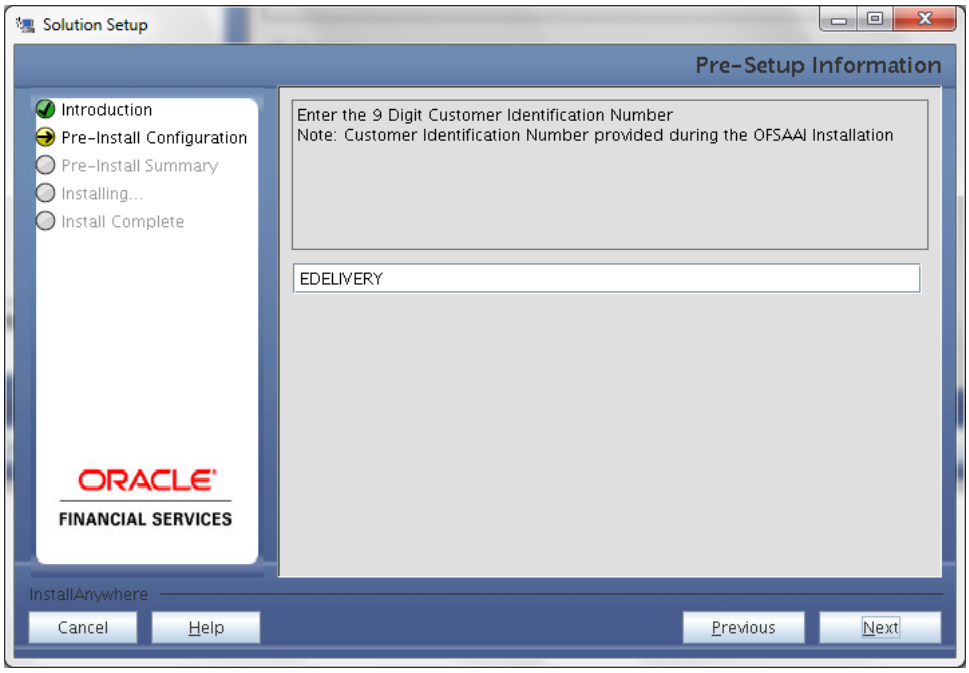
Choose the log mode for this installer. If **Debug** is selected then the debug information will be printed in the log file.



Log Mode Option Screen

Step 4

Enter the 9 digit Customer Identification Number provided during the OFSAAI installation.



Customer ID Input Screen

Click **Next** to continue.

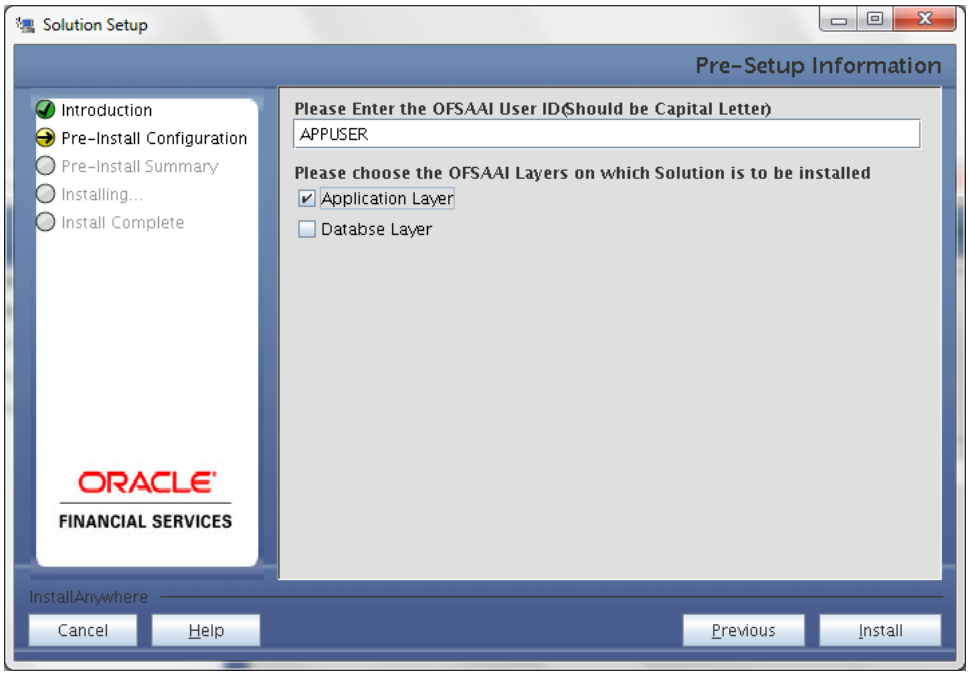
Step 5

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

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**



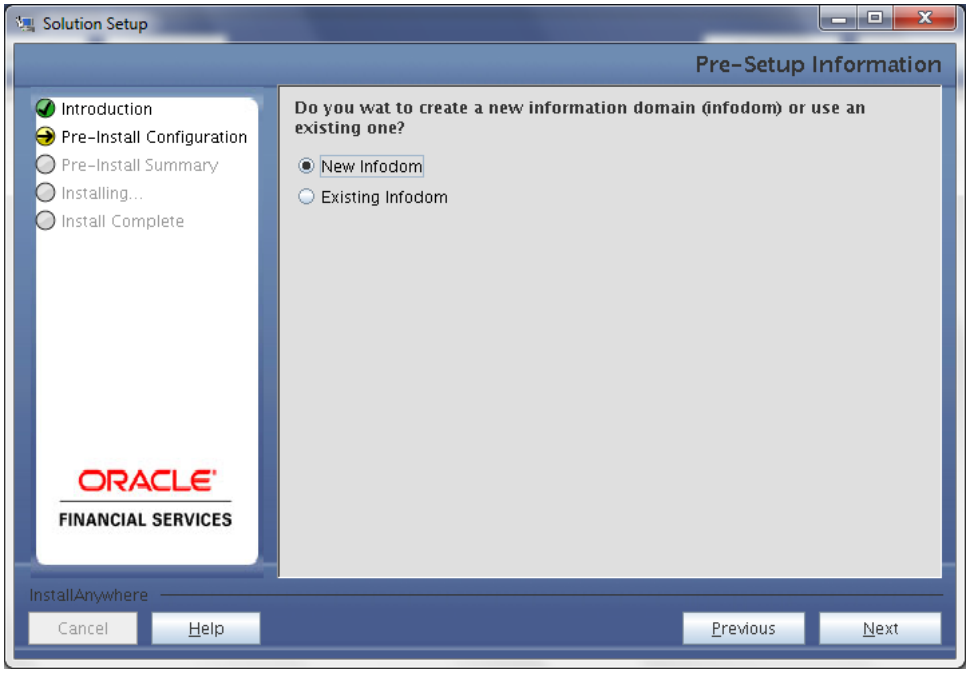
Pre Setup Information Screen – Choose Layer to Install

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 prompt seeks infromation on whether a new infodom has to be created or the existing infodom to be used for installation. Choose the desired option.



Pre Setup Information Screen – Infodom type

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

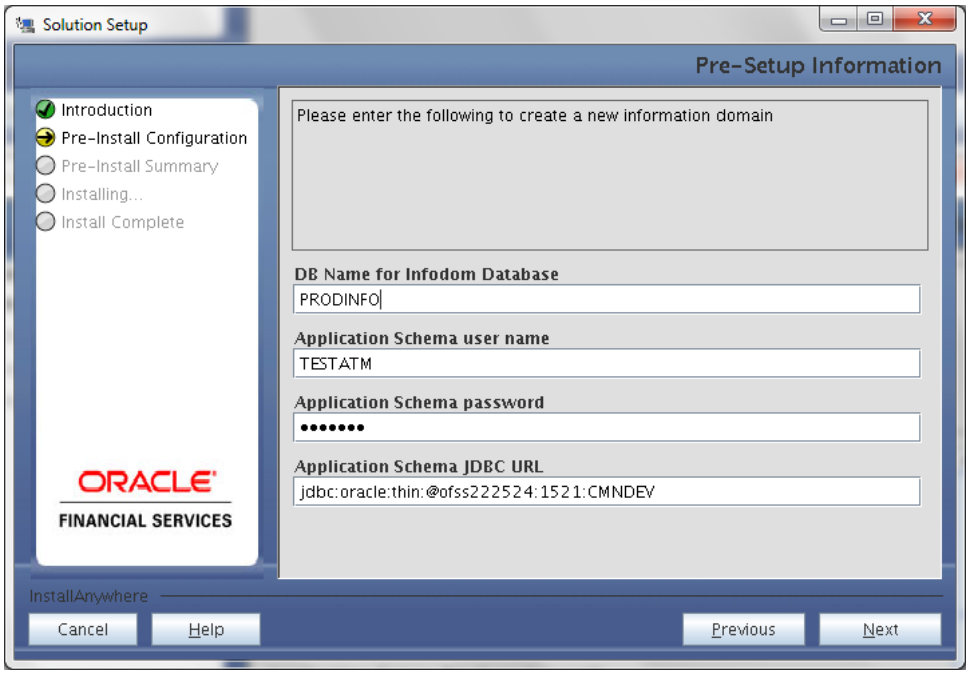
Step 7

If the option **New Infodom** is chosen then update the following to create infodom:

Step 7-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 user name, password and JDBC url in relevant fields.

Click **Next** to continue.

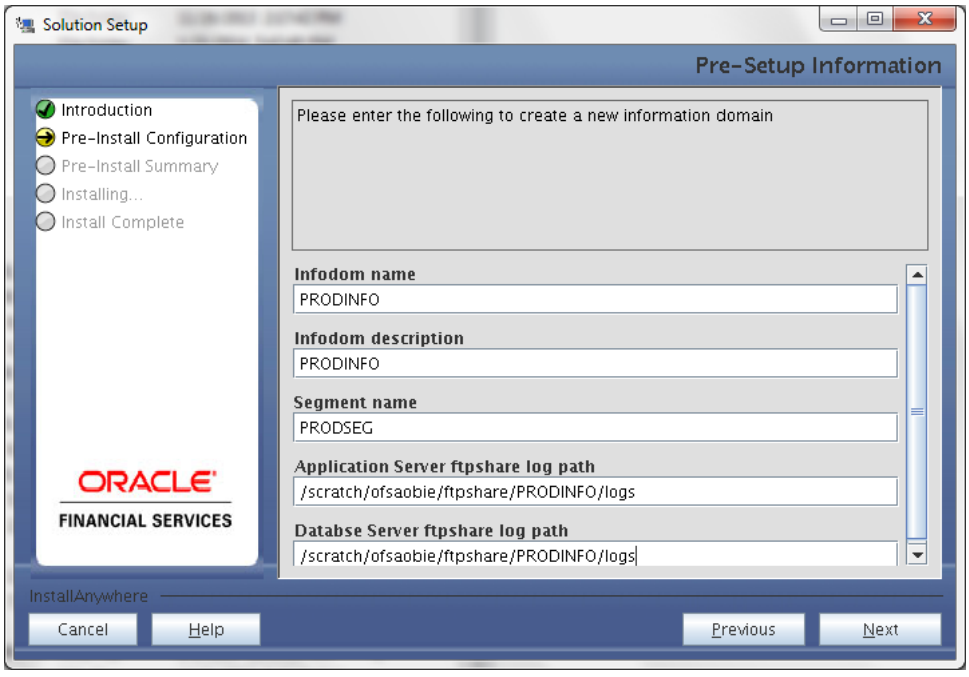


Database details for the new Infodom

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



Infodom details for creation of new Infodom

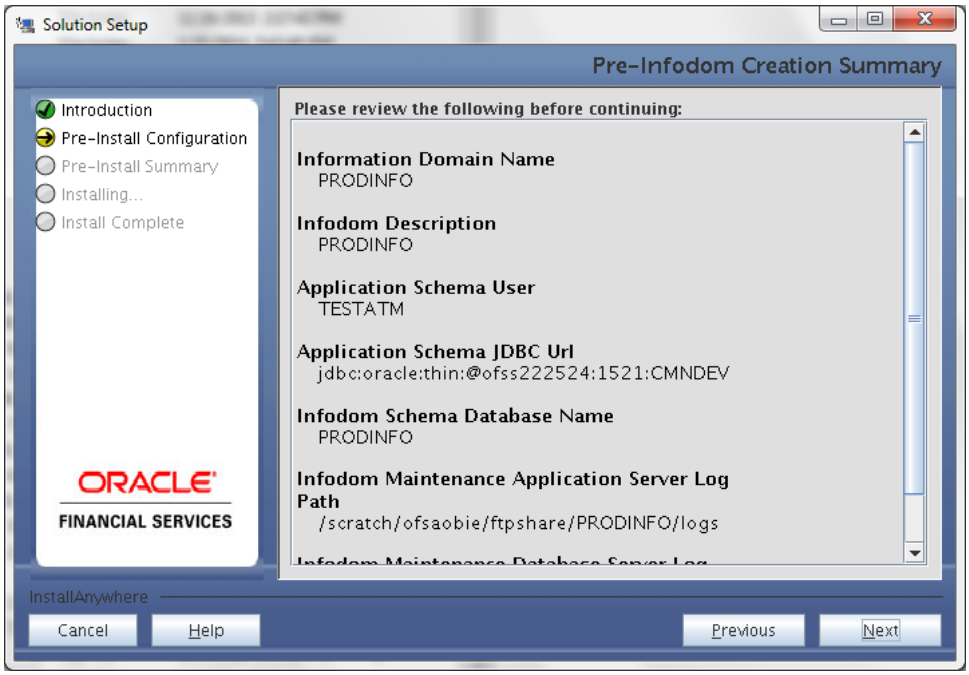
NOTE:

The OFSAAI user must have a role that is able to perform Add/Modify functions for OFS Retail Portfolio Risk Model and Pooling Framework 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.



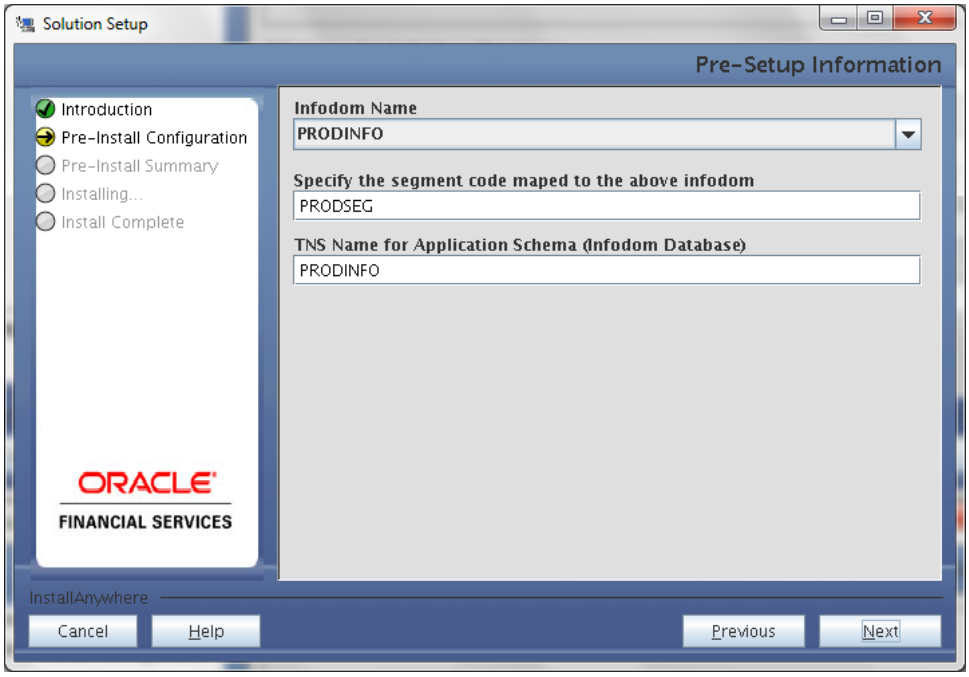
Pre-infodom Creation Summary

Step 8

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

Step 8-i

- Enter segment code.
- Enter the application schema's TNS name.



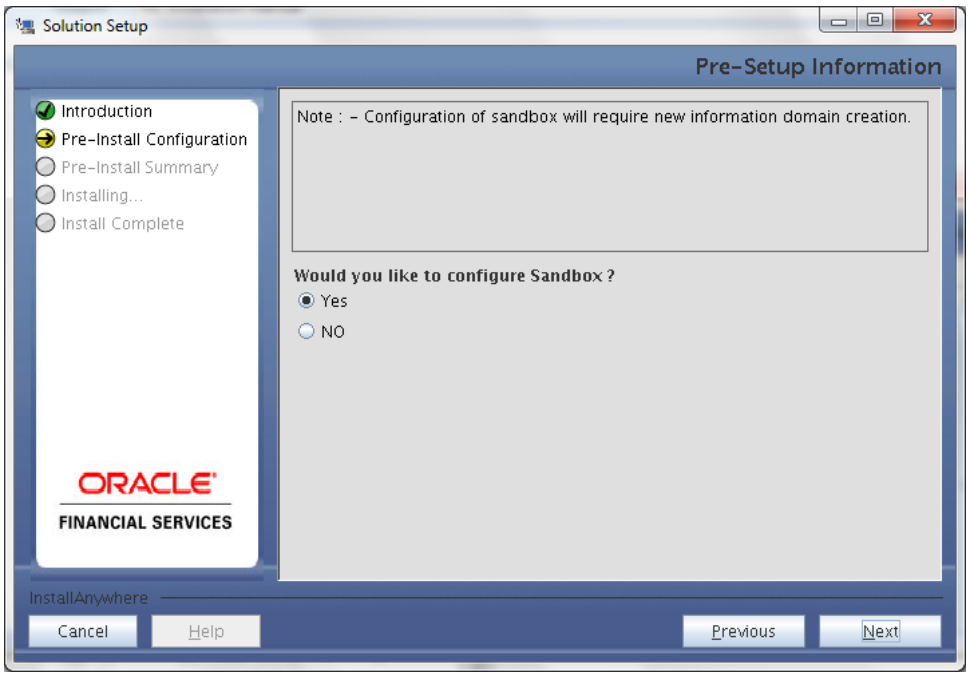
Installation in Progress

Step 9

Oracle Financial Services Retail Portfolio Risk Model and Pooling Release 3.4.1.0.0, Sandbox is packaged as part of the application installer and is installed as a part of the following steps, if required.

In the following screen prompt opt for Sandbox creation process through the installer.

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

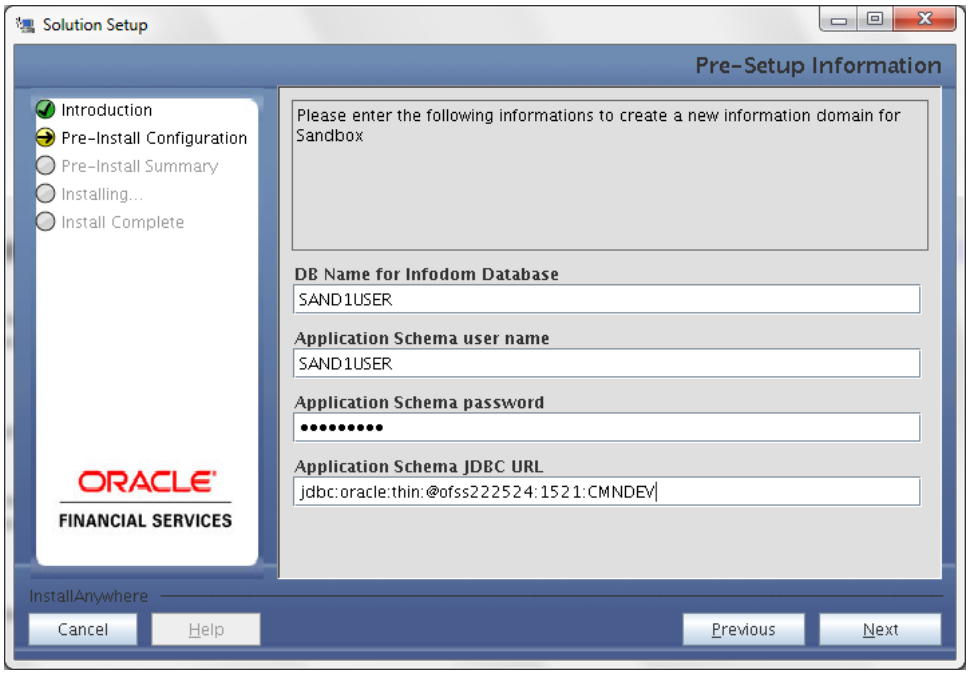


Pre-Setup Information

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.

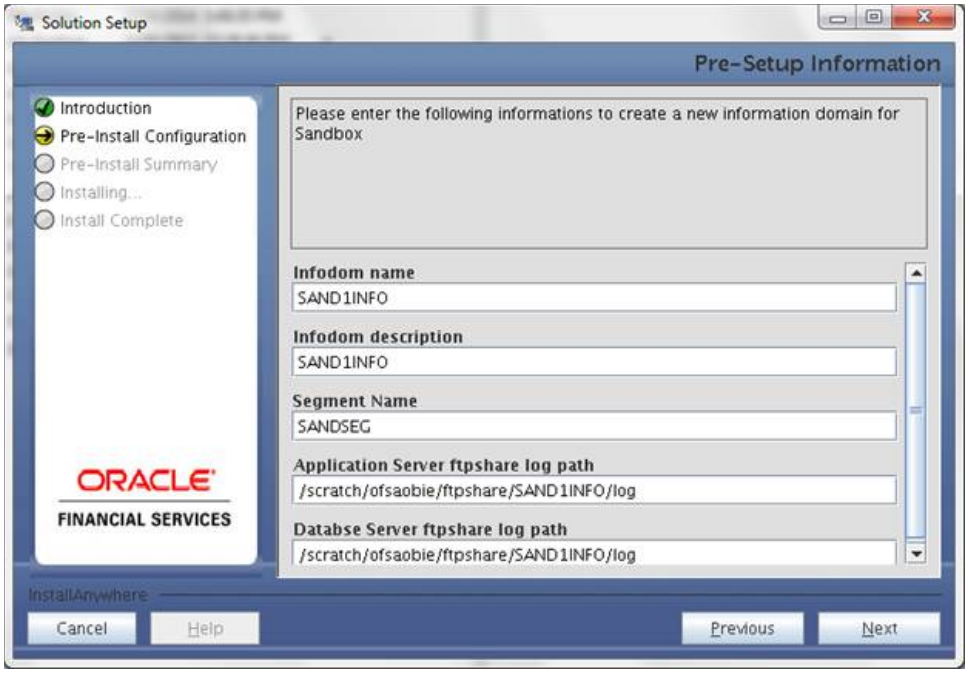
Click **Next** to continue.



Step 9-ii

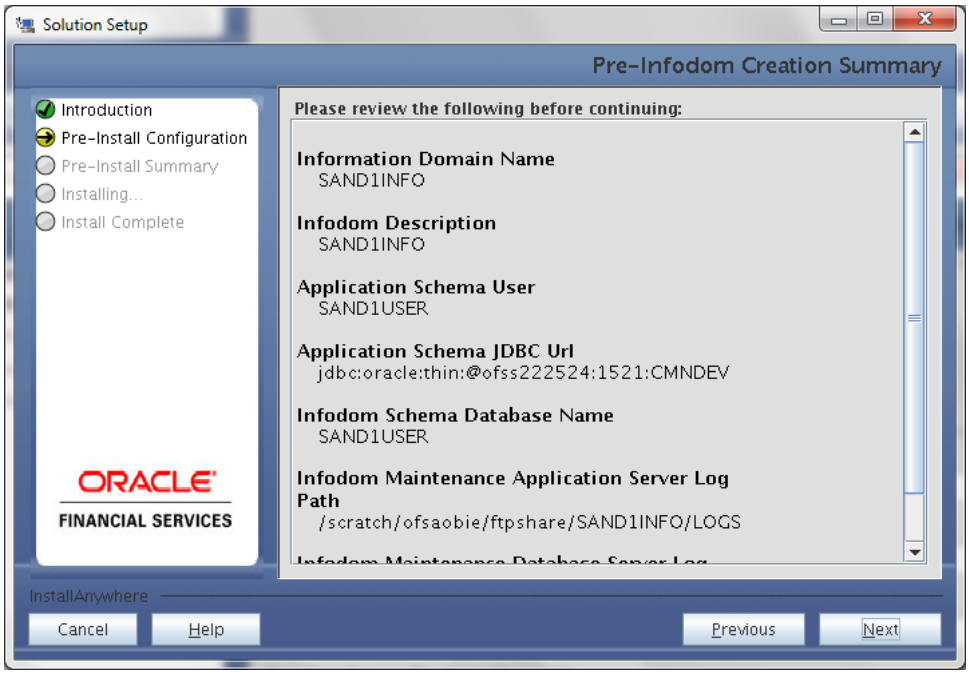
In the next screen prompt, enter the following details:

- 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

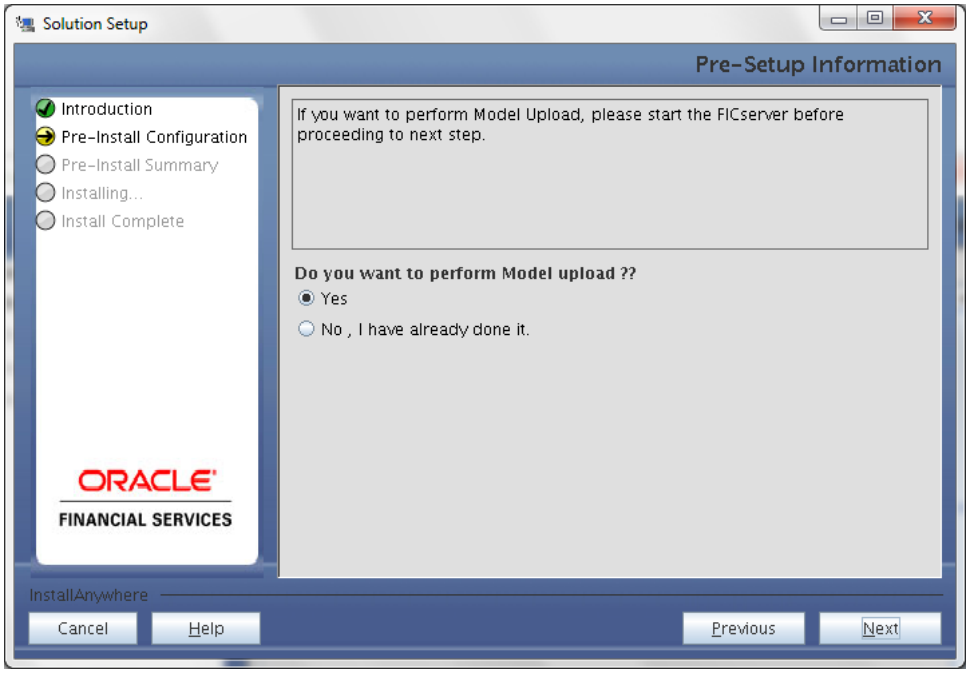
Click **Next** to continue with the creation of information domain.



Step – 10

Oracle Financial Services Retail Portfolio Risk Model and Pooling Release 3.4.1.0.0, data model is packaged as part of the application installer and is installed as a part of the following steps, if required.

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



Pre – Setup information

NOTE:

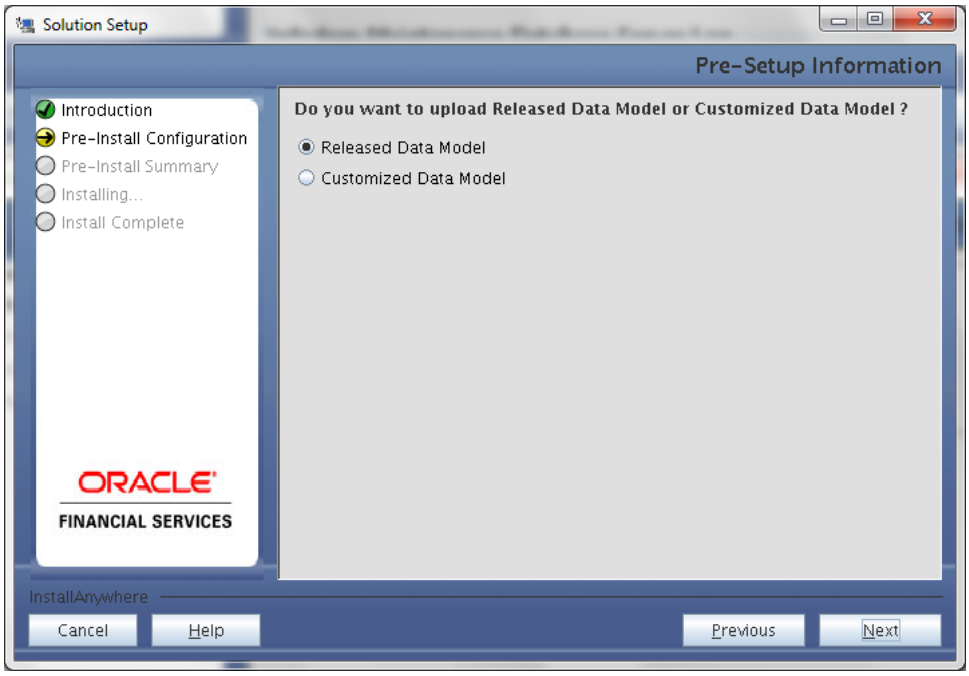
If **Yes** is selected for Data model upload then copy the .xml to a specific folder and rename the file.

Clicking **No** implies that the Oracle Financial Services Retail Portfolio Risk Model and Pooling, 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.



Pre – Setup information

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.

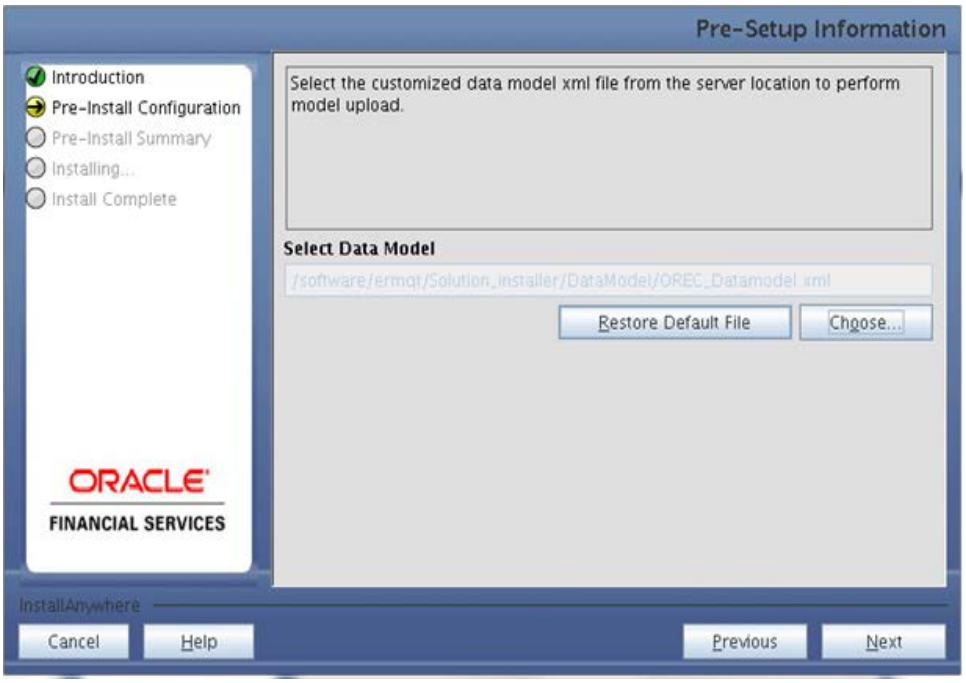
If **Released Data Model** is selected go to **Step 12** or else go to **Step 11**.

Click **Next** to proceed.

Step – 12

If the **Customized Data Model** is selected then the following screen prompt is displayed where

you can select the customized data model located in the machine.



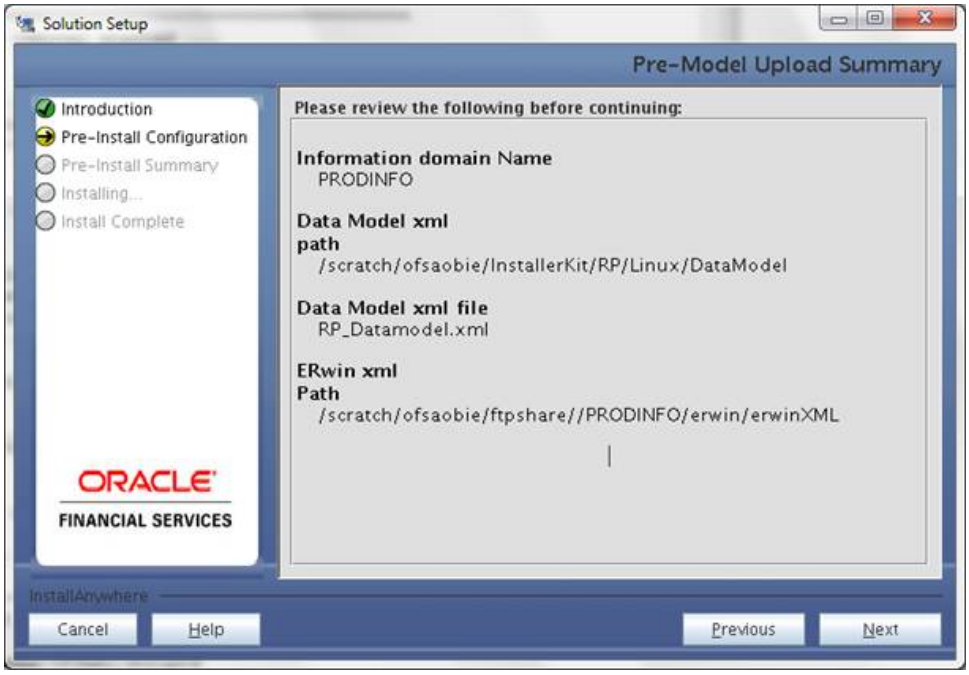
Pre – Setup information

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 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 panel.

Step 13

The following screen prompt displays the premodel upload details:



1. Verify the details before proceeding to the next step.
2. Click **Next** to proceed with model upload.

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. Till the process is complete, no further action can be taken. In addition, 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 through 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.

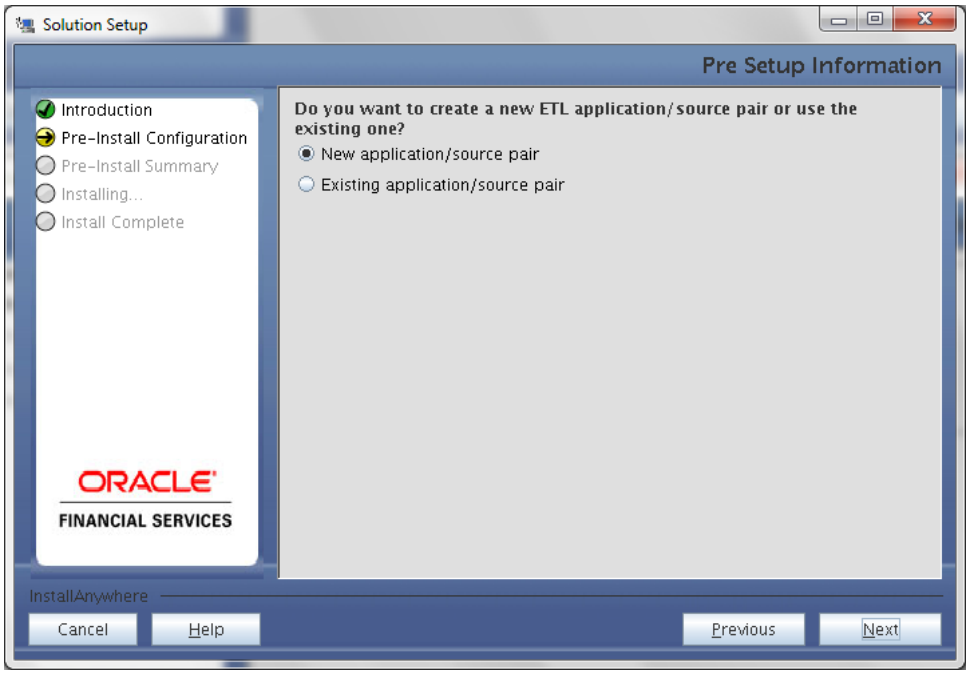
- Error while getting the Erwin File path.

  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.

Creation of the ETL applications

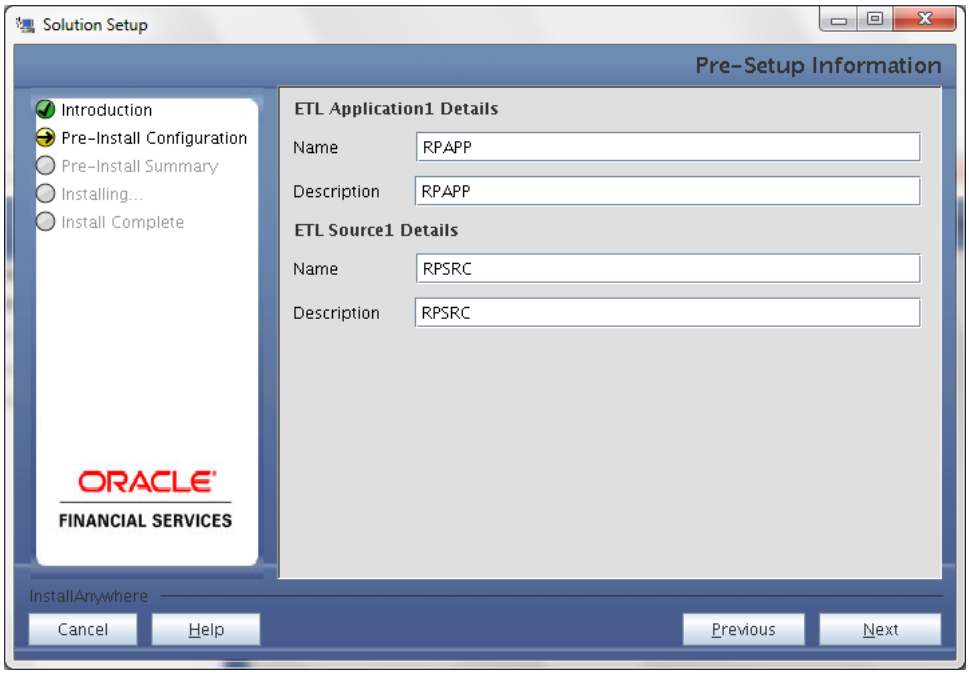
ETL Application mapped to RP_APP

Creation of ETL data sources

ETL Source 1mapped to RP_PROD_SRC

Mapping of the data sources

ETL Application mapped to ETL Source 1



Note:

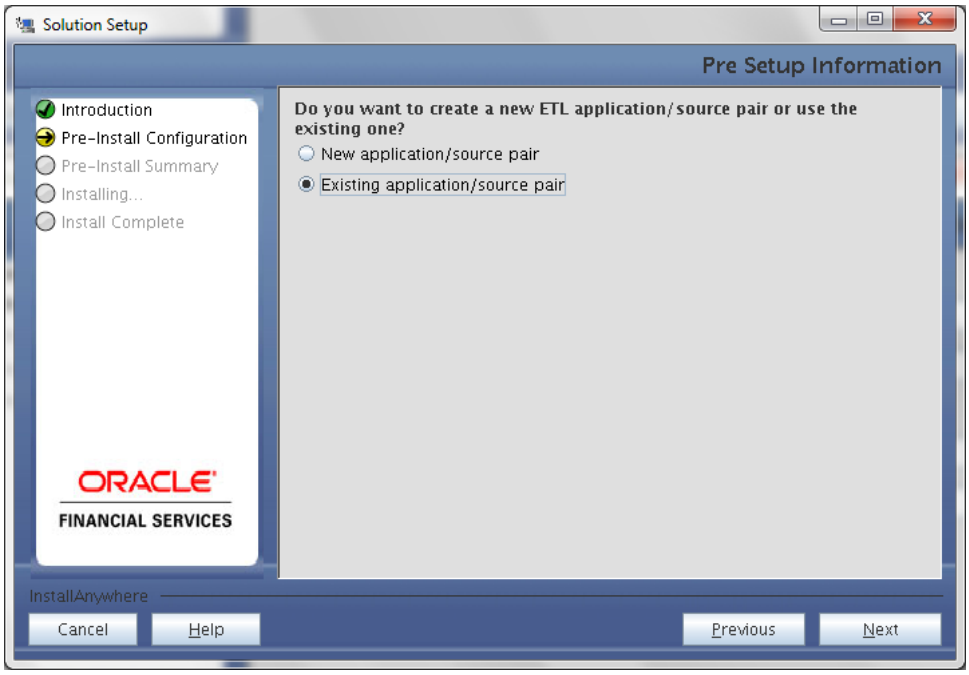
ETL Source will be created pointing to the information domain (atomic schema) that is specified during the installation

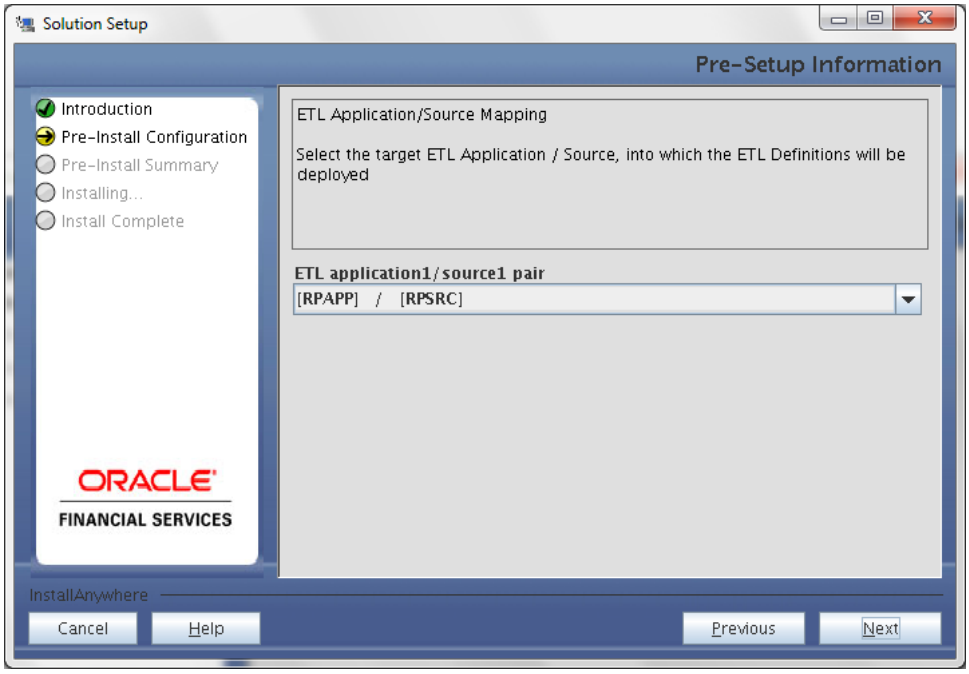
Step 14-ii

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.

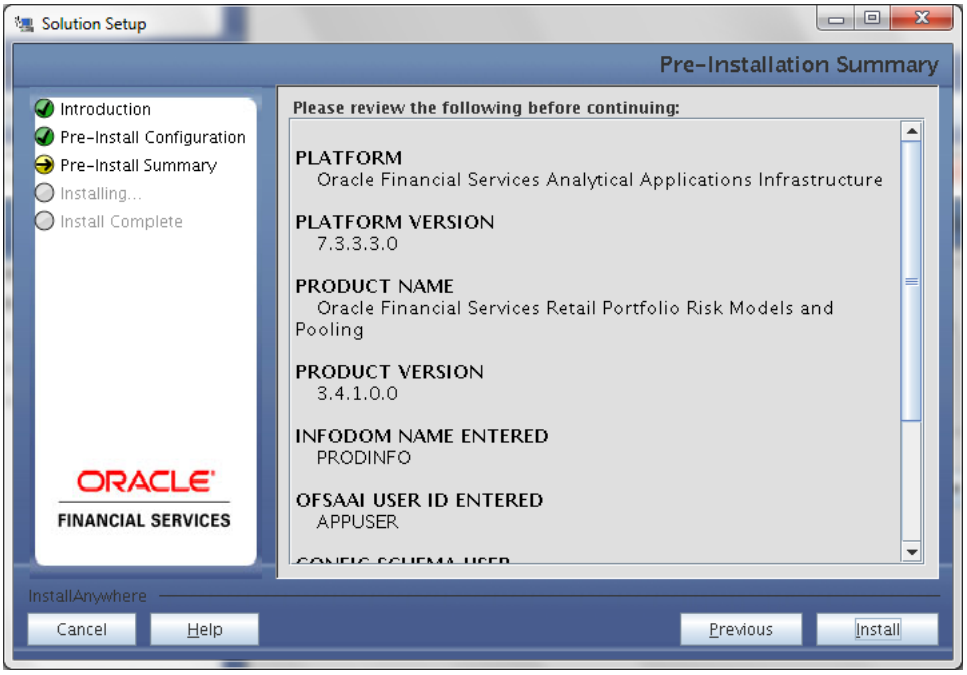
Click **Next** to Process.





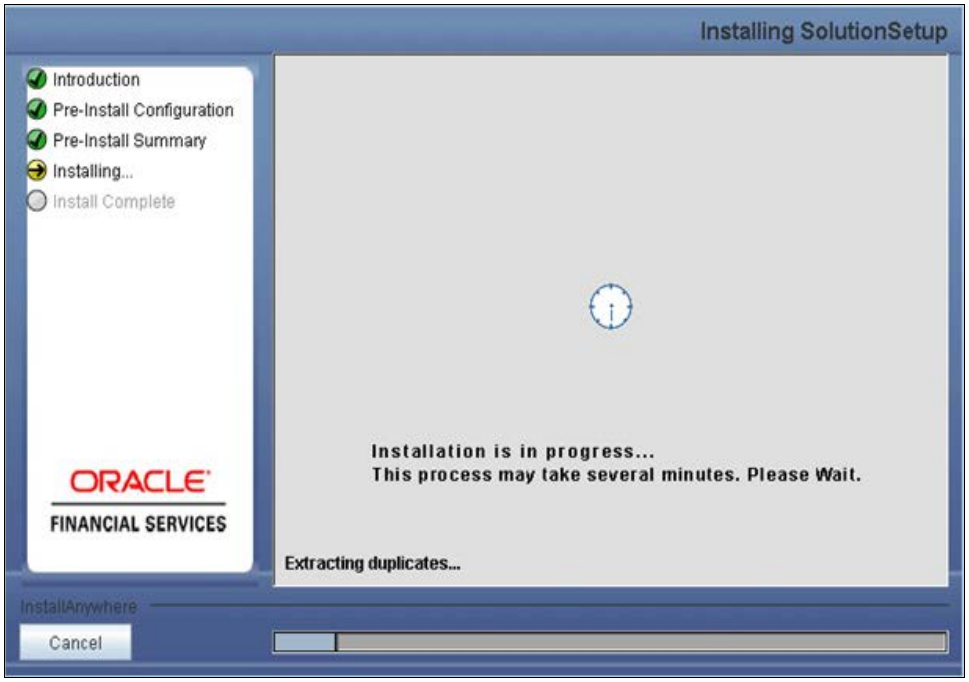
Step 15

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



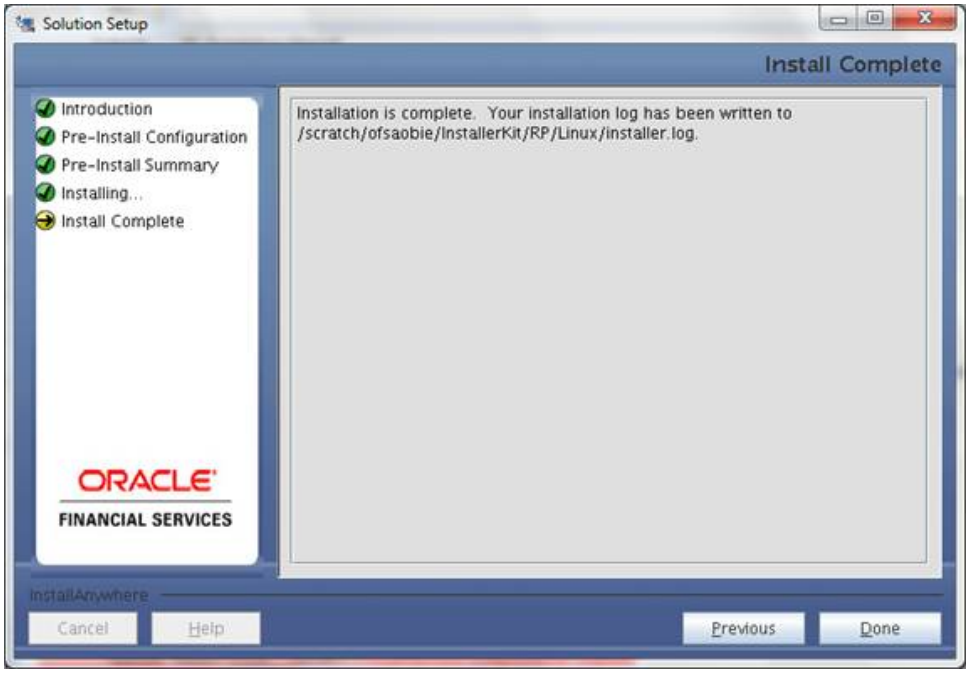
Step 16

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



Step 17

The following screen prompt displays the completion of installation of the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 Setup. Click **Done** to exit.



3.1.2 Machine B – Product Database Layer

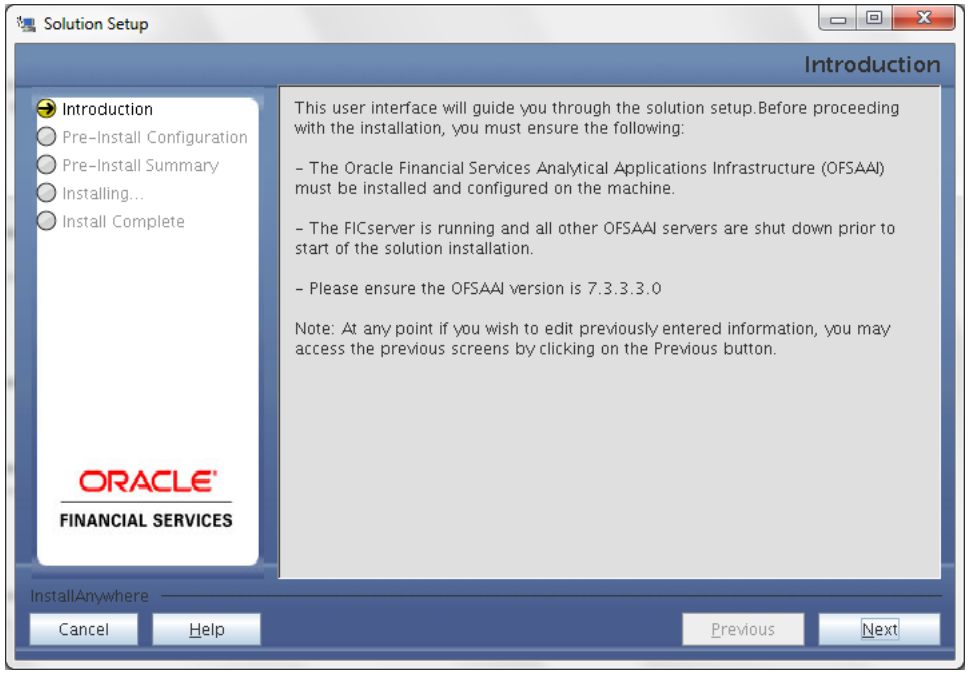
Step 1

To begin with the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 installation, execute **Setup.sh** with the parameter GUI (GUI Installation) or SILENT (for Silent installation).

Installation Splash Screen

Step 2

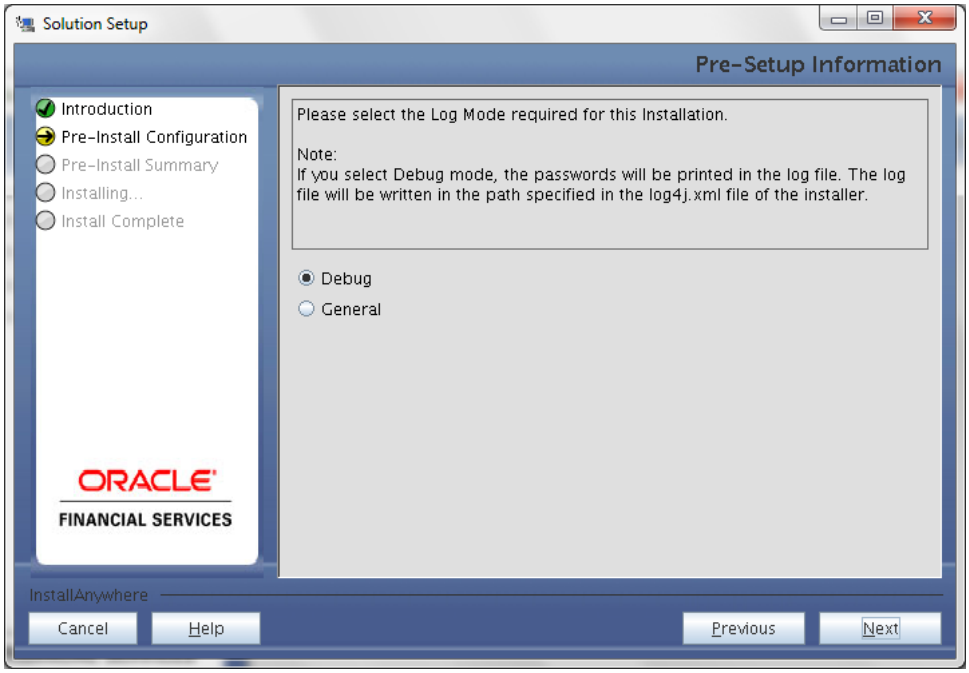
Upon loading the installer, the **Introduction** screen displays the prerequisites for installation. Ensure that these prerequisites are met before you proceed.



Introduction Screen

Step 3

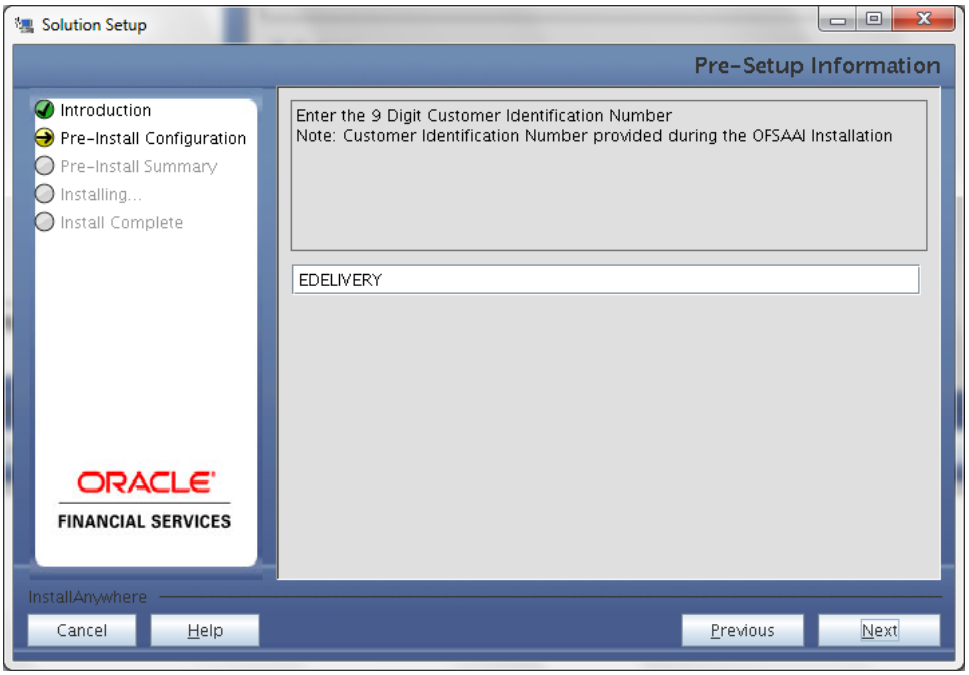
Choose the log mode for this installer. If **Debug** is selected then the debug information will get printed in the log file.



Log Mode Option Screen

Step 4

Enter the 9 digit Customer Identification number provided during the OFSAAI installation.



Customer ID Input Screen

Click **Next** to continue.

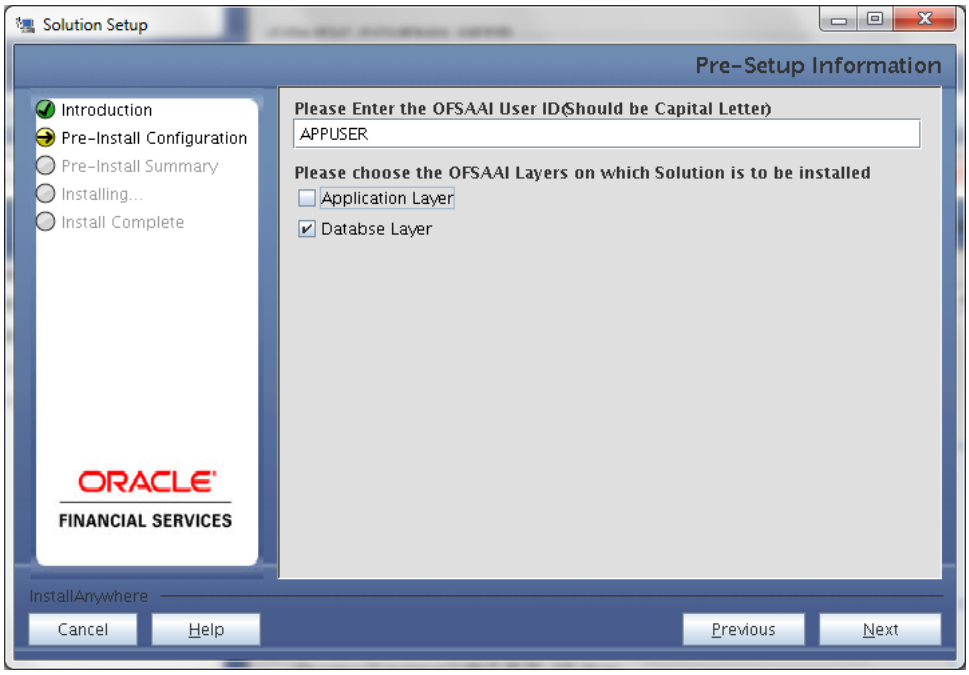
Step 5

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

Enter the OFSAAI user ID.

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

Example: **Database Layer**



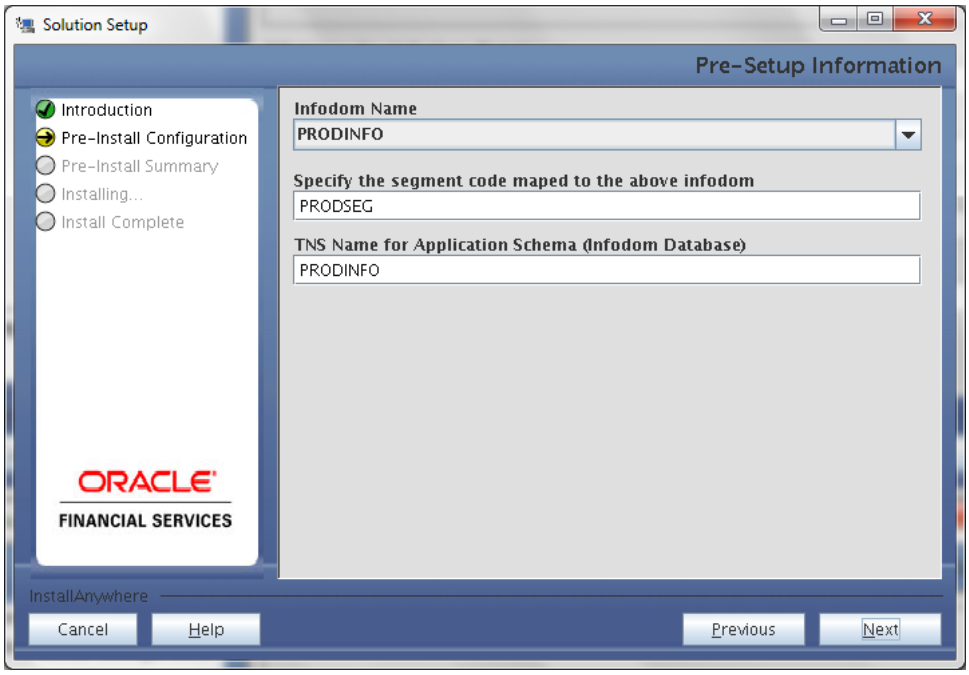
Pre Setup Information Screen – Choose Layer to Install

NOTE:

- 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

Select the infodom from list of infodoms present in the setup, enter segment code and enter the application schema's TNS name in the following screen prompt.

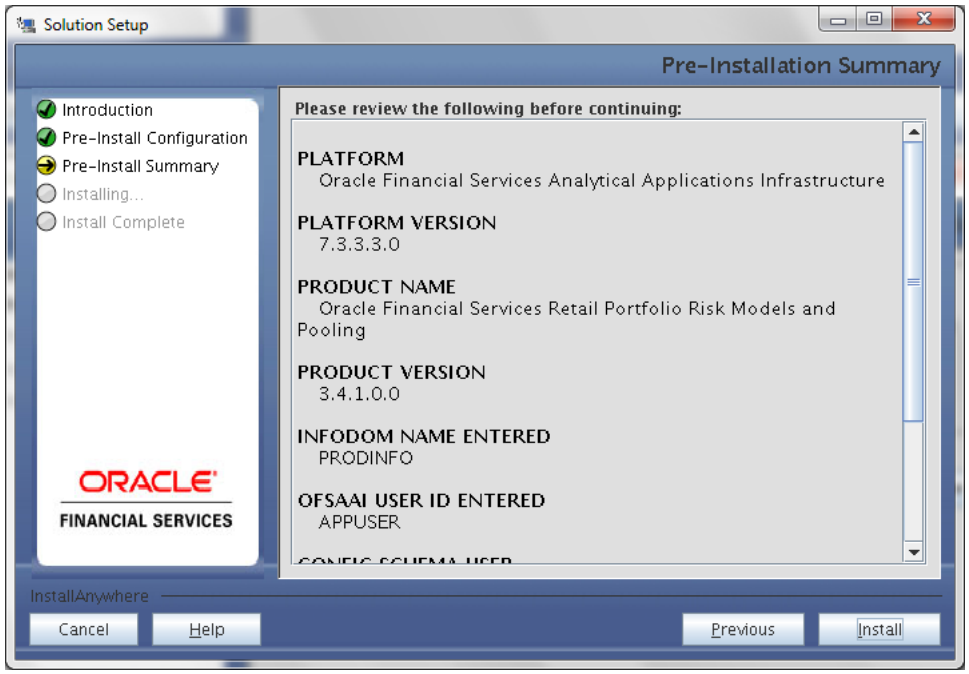


Pre Setup Information Screen – Choose Layer to Install

Step 7

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

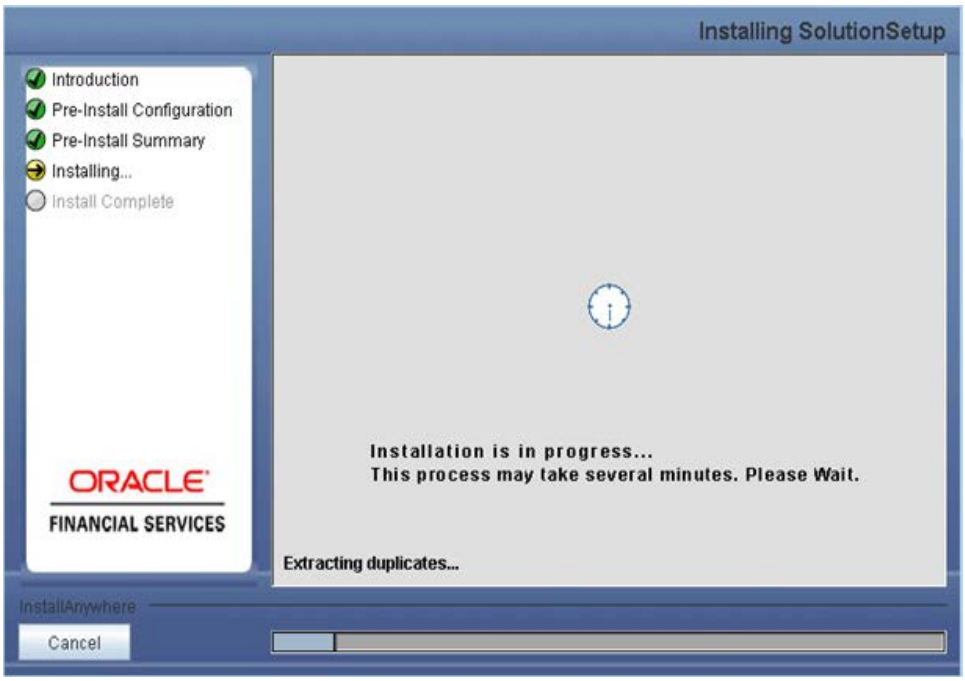
Click **Install** to proceed.



Pre – Install Summary

Step 8

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

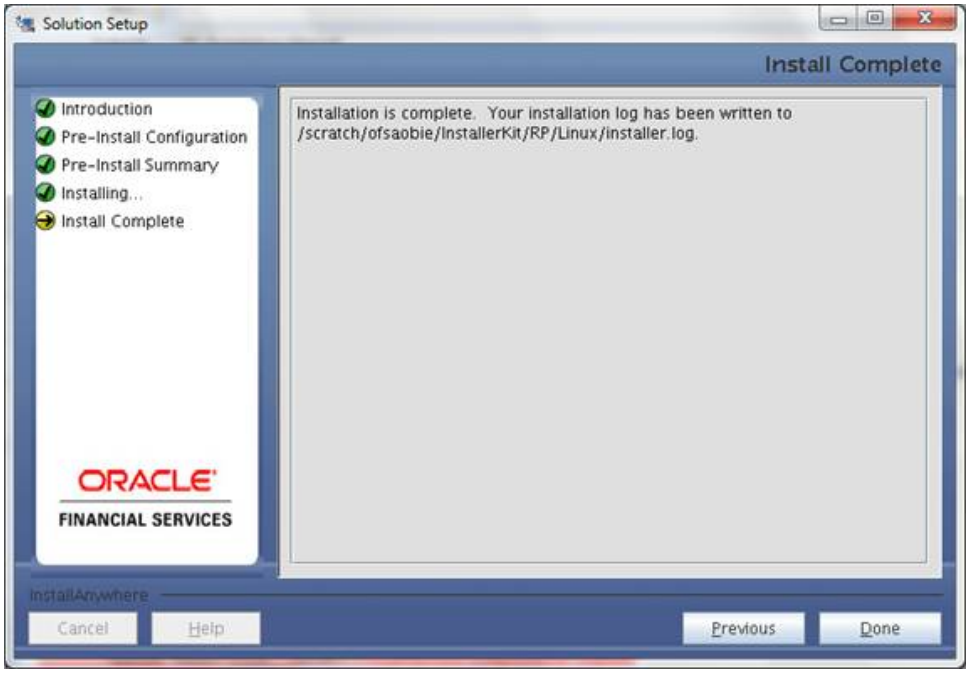


Installation is in progress

Step 9

The following screen prompt displays the completion of installation of the Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 setup.

Click **Done** to exit.



Installation Complete

3.2 OFS Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 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

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

3.3 Post Installation Activities

Once the installation of Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 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 domain segment names to a user group manually.
- Map the sandbox segment names to a user group manually.
- Copy the DynamicServices.xml, Dynamic.dtd, LookupServices.xml and Lookup.dtd from the $FIC_HOME/conf of app layer to ficdb/conf of the db layer.
- Create and deploy the war file into webserver. *For more information on deploying the war file refer the OFSAAI 7.3.0.0.0 Installation manual.*
- Start all OFSAAI Servers.
- Start the web server after deployment.
- If you are installing Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 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
- Recompile all the Functions, procedures and views.
- Re-save sandbox definition with required time hierarchy nodes.

NOTE:

Ignore the following errors in the log:

ORA-00955: name is already used by an existing object

The Oracle Financial Services Retail Portfolio Risk Models and Pooling Release 3.4.1.0.0 application is now ready to be used.

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

Installation Manual
April 2014
Oracle Financial Services Retail Portfolio Risk Models and Pooling, Release 3.4.1.0.0
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