# **Oracle® Banking Platform Collections**

Infrastructure Setup Guide Release 2.4.1.0.0 **E70795-01** 

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Oracle Banking Platform Collections Infrastructure Setup Guide, Release 2.4.1.0.0

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# Contents

Prefa	ace	vii
	Audience	vii
	Documentation Accessibility	vii
	Organization of the Guide	vii
	Conventions	viii

# 1 Introduction

# 2 PTP Approval Changes

2.1	PTP Changes in APM	2-3
2.1.1	Adding the Attributes Required for PTP OES Validation	2-3
2.1.2	Editing Conditions on Attribute	2-7
2.1.3	Adding Policies to Resources	2-9
2.1.4	Giving Grant	2-18

# 3 OBIEE Reports Setup

3.1	Installing Repository Creation Utility (RCU)	3-1
3.2	Installing Oracle Business Intelligence 11g	3-8
3.3	Copying RPD and Reports	3-24
3.3.1	Reports Setup	3-24
3.3.2	Day 0 Setup	3-24
3.3.3	RPD Deployment	3-25

# List of Figures

2–1	PTP Approvals in Artifact Dependency Map (SM500)	2-3
2–2	APM (OES) Login	2-4
2–3	Attribute - PromiseToPay_DaysPastDue	2-5
2–4	Attribute - PromiseToPay_DaysPastDue New	2-6
2–5	Entering Values	2-6
2–6	Authorization Management - Creating a New Resource	2-8
2–7	Authorization Management - New Resource Page	2-9
2–8	Authorization Management - Selecting Resource Type	2-9
2-9	Service Searched Screen	2-10
2-10	Searching a Service	2-10
2-11	Search Resources - Find Policies	2-11
2_12	Search Authorization Policies	2.11
2 12	Soarch Principal	2.12
2-13	Search Principal Application Polos	2-12
2-14	Search Principal - Application Roles	2-13
2-15	Search Frincipal	2-14
2-10	Search Targets	2-15
2-17	Add Targets	2-16
2-18	Target Appears	2-17
2–19	Targets - performwithoutApprovals	2-17
2–20	Condition Builder	2-18
3–1	Run rcu.bat file	3-2
3–2	RCU Installation Wizard - Welcome page	3-2
3–3	Create Repository	3-3
3–4	Database Connection Details	3-4
3–5	Warning message	3-4
3–6	Checking Global Prerequisites	3-4
3–7	Select Components	3-5
3–8	Checking Component Prerequisites	3-5
3–9	Schema Passwords	3-6
3–10	Map Tablespace	3-6
3–11	Confirmation message	3-7
3–12	Validating and Creating Tablespaces	3-7
3-13	Summary	3-7
3-14	Completion	3-8
3_15	Oracla Universal Installer	3-0
3_16	ORI Installation Wizard Walcome page	3-0
0-10 0 17	Install Software Undetes	2 10
0 10	Colort Installation True	0 11
3-10	Select Installation Type	0 10
3-19	Prerequisite Checks	3-12
3-20	Create or Scale Out BI System	3-13
3-21	Specify Installation Location	3-14
3–22	Warning message	3-14
3–23	Configure Components	3-15
3–24	BIPLATFORM Schema	3-16
3–25	MDS Schema	3-17
3–26	Configure Ports	3-18
3–27	Specify Security Updates	3-19
3–28	Warning message	3-19
3–29	Installation Progress	3-20
3–30	Installation Successful	3-21
3–31	Complete BI Installation	3-22
3-32	OBI Interface	3-23
3-33	Update source name and user credentials	3-25
3_34	Upload repository to OBI server	3-26
0 04	epidu repeditory to obriserver	5 20

# List of Tables

2–1	Product-Shipped Adapter Parameters	2-1
2–2	Verifying BPM Worklist Parameters	2-2
2–3	PTP Manual and Auto-Approve Parameters	2-7
2–4	Creating New Resources	2-9
2–5	Application Roles	2-10
2–6	Searching Policies - Search Authorization	2-11
2–7	Searching Policies - Giving Grant	2-18

# Preface

This document helps you to configure the Collections infrastructure setup.

This preface contains the following topics:

- Audience
- Documentation Accessibility
- Organization of the Guide
- Conventions

### Audience

This document is intended for the following:

- Consulting Staff
- Administrators

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# Organization of the Guide

This document contains:

### Chapter 1, "Introduction"

This chapter presents an overview of the infrastructure setup required for Collections.

### Chapter 2, "PTP Approval Changes"

This chapter describes the PTP approval changes, prerequisite, and verification for infrastructure setup.

### Chapter 3, "OBIEE Reports Setup"

This chapter explains the procedure of installing RCU and OBI 11g for OBIEE reports setup.

# Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

# Introduction

1

This document explains the configuration required in enterprise services, such as DMS, OIM, APS to enable Collections module deployment along with OBP platform. You must perform the configuration outlined in this document once Collections module is deployed along with OBP version 2.4.1.0.0. Collections module uses Document Management System (DMS), Oracle Identity Manager (OIM), APS API for document generation and delivery, user profile management, and application security. Various functional components in Collections use the enterprise services offered by OBP.

# **PTP Approval Changes**

Collectors take promise to pay from customers for the outstanding amount. A Promise to Pay (PTP) transaction may require supervisor approval based on various parameters. The parameters on which PTP approval decision has to be made are covered in subsequent sections along with the details of configuration required to setup the approval process. The PTP approval process has been implemented with Oracle Authorization Policy Manager.

### Prerequisite and Verification

Before you configure the Oracle Authorization Policy Manager (OAPM), ensure the following verifications are performed:

### Verifying Installed Application

You need to follow the below mentioned steps to verify installed application:

- 1. Collections module must be deployed along with OBP and is up and running.
- 2. SOA Domain must be configured along with OBP UI and Host Domain.
- **3.** Oracle Authorization Policy Manager (OAPM) must be installed. OAPM is used to implement the resource hierarchies and multiple policy definitions. This is also termed as OES (Oracle Entitlements Server) or APM (Authorization Policy Manager) to verify product shipped configurations in the SOA Domain.

The UI, Host and SOA domains are secured.

**4.** Ensure that the following are present for PTP approval OES parameters. Following are product shipped parameters, which can be used for configuration:

<pre><host_ Home&gt;/config/properties/ConstraintAttrib uteHelper.properties Product Shipped Parameters</host_ </pre>	Adapters
PromiseToPay.PTPType	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter
PromiseToPay.ProductGroup	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter
PromiseToPay.DaysPastDue	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter
PromiseToPay.CoverageRatio	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter
PromiseToPay.ScrificeAmount	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter

Table 2–1 Product-Shipped Adapter Parameters

Table 2–1 (Cont.) Product-Shipped Adapter Parameters

<host_ Home&gt;/config/properties/ConstraintAttrib uteHelper.properties Product Shipped Parameters</host_ 	Adapters
PromiseToPay.DaysToFirstInstallment	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter
PromiseToPay.NumberOfInstallments	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter
PromiseToPay.TotalPromiseDurationInDays	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter
PromiseToPay.UserRole	com.ofss.fc.app.adapter.impl.collection.PromiseToPayWorkflowA dapter

**5.** To verify whether PTP is configured for approval in the BPM worklist, use the following piece of SQL statement. The SQL query has to be run on the OBP Host database.

SELECT \* from Flx\_Sm\_Authorizations\_B where Cod\_Service\_Id =
'com.ofss.fc.appx.collection.service.promisetopay.PromiseToPayApplicati
onServiceSpi.create';

Verify results based on the following table:Column	Values
COD_SERVICE_ID	com.ofss.fc.appx.collection.service.promisetopay.PromiseToPayApplicati onServiceSpi.create
COD_AUTH_ID	1052
AUTH_DESC	<b>MATRIX_AUTH</b> (This is to execute the OES rules and check if approval is needed or the PTP can be auto approved)
IS_AUTH_REQUIRED	$\mathbf Y$ (meaning that the PTP should check the OES rules and go for approval if needed)
IS_DELEGATED	N
CREATED_BY	SETUP
CREATION_DATE	<some and="" date="" time="" value=""></some>
LAST_UPDATED_BY	SETUP
LAST_UPDATE_DATE	<some and="" date="" time="" value=""></some>
OBJECT_VERSION_NUMBER	1
OBJECT_STATUS	A

Table 2–2 Verifying BPM Worklist Parameters

If the above row is not present, insert a new row with given values by using the following SQL statements.

Insert into FLX\_SM\_AUTHORIZATIONS\_B (COD\_SERVICE\_ID,COD\_AUTH\_ID,AUTH\_ DESC,IS\_AUTH\_REQUIRED,IS\_DELEGATED,CREATED\_BY,CREATION\_DATE,LAST\_ UPDATED\_BY,LAST\_UPDATE\_DATE,OBJECT\_VERSION\_NUMBER,OBJECT\_STATUS) values ('com.ofss.fc.app.collection.service.promisetopay.PromiseToPayApplicati onService.create','1052','MATRIX\_AUTH','Y','N','SETUP',to\_ timestamp('31-MAY-10 02.33.04.00000000 PM','DD-MON-RR HH.MI.SS.FF AM'),'SETUP',to\_timestamp('31-MAY-10 02.33.04.00000000 PM','DD-MON-RR HH.MI.SS.FF AM'),1,'A');

If the value of the field IS\_AUTH\_REQUIRED is N, then it can be updated from SM500 screen that is, Artifact Dependency Map. The value has to be update in Approval Checks Tab from SM500 screen for this application service.

Figure 2–1 PTP Approvals in Artifact Dependency Map (SM500)

fact Dependenc	у мар										🚔 Print 🚦
rch Text PromiseT r guided navigation to a sate use task-code+sami naximum of 36 values are	oPayApplica resource (service, taskflow, u hext for better suggestions a displayed where search crite	i-component), phease enter se ind faster searches. (Example ris found eligible values.	arch fest containing the resor CASA001+deposit cash)	arce description. (Example : d	leposit cash, address taskflor	и, СИQ.					
> OTHER > OTH com.ofss.fc.app.p sc2 Pm - DomainEventU Export Data pe: SERVICE	ER-PageDefn > OTHER ID: com.ofss.fc.app.o Desc: Ops - CompareDomai Compare Type: SERVICE	Dis com.ofss.fc.appx Desc.Loan - ChangeTernLo Inquire Lending Variation Details Type: SERVICE	ID: com.ofss.fc.app.g Desc: Gobal - DomainCategor Close Domain Category Type: SERVICE	ID: com.ofss.fc.appx Desc: Origination - SubmissionAcco Revert Configuration Type: SERVICE	ID: com.ofss.fc.app.lc Descel.on - ConditionsPolc Fetch And Export List Type: SERVICE	ID: com.ofss.fc.appx Desc: Colection - ReAllocateCase Update Type: SERVICE	ID: com.ofss.fc.app.d Desc:Dda - SweepOutInstr Update Sweep Out Instruction Type: SERVICE	ID: com.ofss.fc.appx Desc: Collection - SuspendActivit Read Type: SERVICE	ID: com.ofss.fc.appx Desce Collection - AccountRepay Create Type: SERVICE	ID: com.ofss.fc.appx Desc: Collection - PromiseToPayA Delete Type: SERVICE	10t com.ofss.fc.appx Desk:: Colection - PromiseToPayA Cancel Type:: SERVICE
com.ofss.fc.appx sc:Party - PartyAddressD Add Organization Registered Address per SIRVICI	ID: com.ofss.fc.appx Dese: Origination - SubmissionColla Add Personal Guarantee Type: SERVICE	ID: com.ofss.fc.app.l Desc:Loan - LoanApplication Validate Loan Account Configuration Step	ID: com.ofss.fc.appx Desc: Dds - SweepOutinstr Create Sweep Out Instruction Via Dashboard Type: SIRVICE	ID: com.ofss.fc.appx Dese: Collection - HardshipApplic Create Type: SIRVICE	ID: com.ofss.fc.app.p Desc: Pc - InstitutionCate Fetch Institution Category Type: SERVICE	ID: com.ofss.fc.app.p Desc: Pc - ClearingHouse Delete Clearing House Type: SERVICE	ID: com.ofss.fc.app.p Desc: Pm - TempProductGr Derive Roles For Mapping Type: SERVICE	ID: com.ofss.fc.app.c Desc: Collection - CaseFollowUpH Update Type: SERVICE	ID: com.ofss.fc.app.l Desc: Loan - LoanOsbursem Add Loan Disbursement Instruction Type: SIRVICE	ID: com.ofss.fc.appx Desc: Collection - PromseToPayA Update Type: SERVICE	ID: com.ofss.fc.appx Desc: Colection - PromseToPayA Reject Type: SERVICE
soc Td - TermDepositDP Fetch U D M Negotation Approval Item Details For Ren	10: com.ofss.fc.appx Desc: Origination - StructureSoluti Mark Account For Offer Swap Type: SERVICE	ID: com.ofss.fc.app.p Desc: Party - KYCVerification Reopen K Y C Verification Summary Type: SERVICE	ID: com.ofss.fc.appx Desc: Commonservice - CurrencyPwdR Reopen Currency Pwd Rates Maint Type: SERVICE	ID: com.ofis.fc.app.i Desc: Ins - InsuranceProvi Fetch Al And Export Type: SERVICE	ID: com.ofss.fc.appx Desc.Lon - ChargeAppicat Close Charge Type: SERVICE	10: com.ofss.fc.app.p Desc: Party - PartyOeDupica Check For Dupicate Identifications Type: SERVICE	ID: com.ofss.fc.appx Desc: Pm - LoanOfferAppi ReopenLoan Offer Type: SERVICE	ID: com.ofss.fc.appJ Desc:Loan - LoanBilingAppI Reverse Legal Pees Biling Type: SERVICE	ID: com.offs SERVICE Desc: Colection - PromiseToPayA Read Type: SERVICE	Collection - PromiseToP Desc: Collection - PromiseToPayA Create Type: SERVICE	ayApplicationServiceS Desc: Colection - PromiseToPayA Before Create Type: SERVICE

# 2.1 PTP Changes in APM

APM/OES is a system where you can define Oracle Entitlement Server (OES) rules. These rules help in deciding whether PTP approval should be a manual approval or auto-approved.

**Note:** These rules are part of Day Zero Setup. You can use this document to verify whether the rules have been configured or not. If the rules are not configured, then you use this document to configure them.

- 1. In APM, you should add the attributes, based on their values, it is decided whether PTP should be auto-approved or should go for manual approval.
- **2.** The attributes added uses simple if else conditions and based on the final result (true/false), the decision to auto-approve or manual approve is made.

### 2.1.1 Adding the Attributes Required for PTP OES Validation

Follow the steps below to add the attributes required for PTP OES validation:

1. Log in to APM (OES) with administrative credentials.

### Figure 2–2 APM (OES) Login

Firefox Oracle Entitlements Server : Authoria	ratio +		Parallel in a local second, Table		
C C 10.184.153.13:7701/apm/faces/AuthPolicyMgr.js	px?_afrWindowMode=08k_afrLoop=199087	7377279198c_adf.ctrl-state	:10f81/r4yu_9	thrace → C Google	₽ ਫ਼ ਫ਼ - ⊡- ∔ ↑ ≁ -
ORACLE <sup>®</sup> Entitlements Server					Accessibility Help Sign Out Q Signed in as weblocic
Autor - Ven - Control - Co	None Welcome to Authorization Policy M Sector an application to manage, then set Application time 2007 2007 2007 2007 2007 2007 2007 200	Insert, the administration of a action from the lesis below New Search Completion and Completion New Search Completion Role New Search New Search	an cansale far Oracle Initilements Server. Iour.	Intel Role Happing Policies New Search Policies New Search Mex Search	Spred in as webling
	Note: chipesta will be on Note: chipesta will b	neted in the default domain Search and Create Search - Users Search - Applications Create - Application			
Copyright @ 2009, 2013, Oracle and/or its affiliates. All rights res	ierved.				Orade Entitlements Server   11.1.2.2.0

- In the Authorization Management tab, under Search > For Attributes > In OID PolicyDomain > Search for any attribute from the list provided below:
  - PromiseToPay\_PTPType
  - PromiseToPay\_ProductGroup
  - PromiseToPay\_DaysPastDue
  - PromiseToPay\_CoverageRatio
  - PromiseToPay\_ScrificeAmount
  - PromiseToPay\_DaysToFirstInstallme
  - PromiseToPay\_NumberOfInstallmen
  - PromiseToPay\_TotalPromiseDurationInDays
  - PromiseToPay\_UserRole

Below mentioned screen is the Attribute PromiseToPay\_DaysPastDue screen.



Figure 2–3 Attribute - PromiseToPay\_DaysPastDue

**3.** If the attribute **PromiseToPay\_DaysPastDue** does not exist, then create it by clicking the **New** icon.

Figure 2–4 Attribute - PromiseToPay\_DaysPastDue New

Authorization Management System Configuration Search ③ For Attributes  In OBP  PromiseToPay_DaysPastDue  PromiseToPay_DaysPastDue  Name  PromiseToPay_DaysPastDue  PromiseToPay_DaysPastDue	
For Attributes  For Attributes  In OBP  PromiseToPay_DaysPastDue  Search Results  Actions  View  View  PromiseToPay_DaysPastDue	ion
PromiseToPay_DaysPastDue	Welcom
Name       Image: State of the	Application OBP
	b2bui soa-infra OracleBPI
	OracleBPI

**4.** Enter **Display Name**, **Name**, and **Description**. The **Display Name**, **Name**, and **Description** will be same as the attribute name.

Figure 2–5 Entering Values

ORACLE' Entitlements Server		Accessibility Help Sign Out 📿
		Signed in as weblogic
Authorization Management System Configura	tion	
Search (2)	Home IIII PromiseToPay_DaysPastDue IIII Untitled	, el
For Attributes ·	OEP Extensions Attributes	
PromiseToPay_DaysPastDue	Untitled	Save v Cancel
😫 Drowse 🔍 Search Results		"Required
Actions • View • 📑 🛅	Display Name PromiseToPay_DaysPastDue	
Name	* Name PromiseToPay_DaysPastDue	
Will PromiseToPay_DaysPastDue	Description PromiseToPay DavisPattTale	
	Category Resource 💌	
	Type String	
	Input Values @ Single () Multiple	

- 5. Select Category as Dynamic.
- 6. Select the Type and Input Values based on the field type and the kind of values.
- 7. Click Save.

The following table lists the PTP manual and auto-approve parameters.

Display Name	Name	Description	Category	Туре	Input Values
PromiseToPay_ PTPType	PromiseToPay_ PTPType	Indicates the promise to pay type.	Dynamic	String	Single
PromiseToPay_ ProductGroup	PromiseToPay_ ProductGroup	Indicates the product group for which the PTP has been taken.	Dynamic	String	Single
PromiseToPay_ DaysPastDue	PromiseToPay_ DaysPastDue	Indicates the days past due.	Dynamic	String	Single
PromiseToPay_ CoverageRatio	PromiseToPay_ CoverageRatio	Indicates the coverage ratio.	Dynamic	Integer	Single
PromiseToPay_ ScrificeAmount	PromiseToPay_ ScrificeAmount	Indicates the sacrifice amount.	Dynamic	Integer	Single
PromiseToPay_ DaysToFirstInstallm ent	PromiseToPay_ DaysToFirstInstallme nt	Indicates the day after the first installment.	Dynamic	String	Single
PromiseToPay_ NumberOfInstallme nts	PromiseToPay_ NumberOfInstallmen ts	Indicates the total number of installments in PTP.	Dynamic	String	Single
PromiseToPay_ TotalPromiseDurati onInDays	PromiseToPay_ TotalPromiseDuration InDays	Indicates the total promise duration in days.	Dynamic	String	Single
PromiseToPay_ UserRole	PromiseToPay_ UserRole	Indicates the role of the user who has created the PTP.	Dynamic	String	Single

Table 2–3 PTP Manual and Auto-Approve Parameters

### 2.1.2 Editing Conditions on Attribute

The OES rules are checked based on the conditions defined in the rules. These rules are defined based on the functional requirement and business perspective. In this case, the OES rules are defined to decide whether PTP has to go for manual approval or has to be auto approved. If the outcome is true, auto approval is done, else PTP is sent for manual approval.

**Note:** The services will be product shipped and will be available after the day 0 setup. Please follow the steps below to define/verify the conditions on the attributes that are present in the table above.

- Click Browse > Applications > [Policy Store Area] > [Policy Store Domain] > ResourceCatalog. Select Resources, then right-click and select Open (to verify).
- 2. Right-click **Resources** and then select **New**.

Figure 2–6 Authorization Management - Creating a New Resource

# **ORACLE** Entitlements Server



When you click the New button, following screen appears.

Figure 2–7 Authorization Management - New Resource Page

Untitled		Save 👻
* Resource Type AdfUComponent	-	
Display Name		
* Name		
Description		
Instance Attributes and Overwrites		
Actions - View - 📥 Add 💥 Remove	2	
Display Name N	Name	Values
No data to display.		

**3.** In the **Untitled** screen, specify the following values:

Table 2–4 Creating New Resources

Field Name	Value
Resource Type	Service
Display Name	com. of ss. fc. appx. collection. service. promise to pay. Promise To Pay Application Service Spi. create
Name	com. of ss. fc. appx. collection. service. promise to pay. Promise To Pay Application Service Spi. create
Description	com. of ss. fc. appx. collection. service. promise to pay. Promise To Pay Application Service Spi. create

4. Select the **Resource Type** as **Service**.

Figure 2–8 Authorization Management - Selecting Resource Type

Home Dutitled	
OBP   OBP   Resource Catalog   Resources	
Untitled	Save 🗸 Cancel
Resource Type	"Required
* Resource Type Service	
AdfUIComponent	
Display Name Page	
* Name ReportField	
Description Service	
ServiceResponseElement	
MenuEolder	
1 100 100 0100	
Instance Attributes and Overwrites	
Actions - View - 🐈 Add 💥 Remove	
Display Name Name	Values
No data to display.	

5. Click Save.

### 2.1.3 Adding Policies to Resources

Policies are added to apply grant or deny permissions to the application roles to the application service configured.

The following application roles are shipped along with the product and will be available in Oracle Internet Directory (OID) once the Day Zero setup is completed.

Application Role Description	Corresponding Role in OID	
Collector (Dialer)	ClnCollectorDialer	
Collector (Early - Prompt mode)	ClnCollectorErPmtMd	
Collector (Early - List mode)	ClnCollectorErLstMd	
Collector (Recovery)	ClnCollectorRecov	
Supervisor (Collection)	ClnSupervisorCln	
Supervisor (Recovery)	ClnSupervisorRecov	
Manager (Collection)	ClnManagerCln	
Manager (Recovery)	ClnManagerRecov	
Collection Admin	ClnCollectionAdmin	

Table 2–5 Application Roles

**1.** You can search the resource from APM domain and view the added attribute in the Service Searched screen.

Figure 2–9 Service Searched Screen

com.ofss.fc.app.collection.	E   Resource Catalog   Resources service.promisetopay.PromiseTe	oPayApplicationService.create	Apply Revert
Name com.ofes.fc.app.coli Description Collection - Promise?	ection.service.promiselispay.Promisell@PayAp 6Pay.create	oplication/Service.create	"Repired
Instance Attributes and Overer	čes		
Actions - View - da Add	Remove		
Actions + View + dige Add	Renove Nane	Values	
Actions + Vew + dis Add 2 Display Name Ir Transaction_Check_Point	Ranove Name Transaction_Check_Point	Values rul	
Actions - View - dijk Add Display Name Transaction_Drack_Point > SecondPactor	Kenove Name Transaction_Check_Point SecondPactor	valuer rul (N	
Actions - View - dip Add Display Name Display Name	Name Transaction_Check_Point SecondPactor Pinancia®ndicator	Yalues Ind TR FALSE	
Acters - Vev - dja Add Display hans Presection_Check_Point SecondPactor PrinnceBridicator > ApplicationCategory	Tana Tana Tanacton_Dack_Poet SecondPactor Prencisiondcator Applicator/Category	Tabus Ind Ind IN IN FAUE Collecton - Create Services	
Actans - Vev - dja Add Display Name Transaction_Dedu_Point > SecondPactor > Prencisitindicator > ApplicationCategory > CMM_Transaction_JD	Varia Termaction_Deck_Point SecondPactor Privandethrdcator ApplicationCategory GWHC_Transaction_JD	Valuer nul N FAUSE Collector - Create Services nul	
Actions + Vee + dip Add 2 Doplay Name Transaction_Deed_Point > Security Deed_Point > Prencisibilitator > ApplicationCategory > CMAM_Transaction_ID > Allowed/block/attoutes	Kenore Transaction_Check_Paint SecontPactor Prenciabridicator ApplicationCategory OAMUTTanasaction_D Allowed/Machathoutes	Yalaas nul N F4LSE Colecton - Create Services nul PromocTafley_TTTTppc, homocTafley_DopfiesDuc, homocTafley_TurbicDEnstallments, homocTafley_TolathomocDuratorisClays	
Actors - View - Up Add 2 Daptay Name > Transctore_Deed, Point > Pranscation_Deed, Point > Pranscation_Deed, Point > ApplicationCongory > Allowed/Net/Nationation > Allowed/Net/Nationation > UDband&ConstoreNamed	Kenove     Yame     Transaction_Chiedy_Point     SecondPactor     Newcabbricator     ApplicationCategory     OAMA_Transaction_ID     AllowedPalkyAltholeta     UDernalidyAltholeta	Yalues Ind Ind Ind IN IN FAUSE Collector - Create Services Ind RomecTafles, FIMTper, PromecTafley, DaysfrasDue, PromecTafley, Juride: D.Brotalinevia, PromecTafley, TotalihomesDuratorial:Cays FAUSE	

2. To search a service, select **Display Name** as **Equals** and **Value** as **com.ofss.fc.appx.collection.service.promisetopay.PromiseToPayApplicationServ iceSpi.create**.

Figure 2–10 Searching a Service

Firefox * Oracle Entitlements Server : Authorize	tio +	A DESCRIPTION OF THE OWNER.	- 0
C 3 10.184.153.13:7701/apm/faces/AuthPolicyMgr.jsp	(]_afrWindowMode=08c_afrLoop=1990877377279198c_adf.ctrl-state=10f81ir4yu_9	thr ∀ C Scogle	P 🗃 👹 - 🖬 + 🗍
ORACLE <sup>®</sup> Entitlements Server			Accessibility Help Sign Out 🧲 Signed in as weblook
Authorization Management System Configura	tion		
Search ()	Home B Search Resources		E.
For Application Roles	Search Resources		
in cor	OBP   OBP   Resource Catalog		
28 Browse Q. Search Results	* Resource Type Service		
Action - View - [ 💁			
Global	Daplay Name Equals rom. ofss. fc. appx. collection.service		
V P Applications	Name Starts With		
V B Cep			Search Reset

- 3. Click Search.
- 4. In the Search Results grid, click the returned value and then click Find Policies.

Figure 2–11 Search Resources - Find Policies

Firefox  Oracle Entitlements Server : Authoriza	tion +		and the second		- 0	25
Center Contemporation (Contemporation Contemporation Contemporatio Contemporation Contemporation	rl_afrWindowMode=08c_afrLoop=1990877377279198c_adf.ctrl-state=10f81Ir4yu_9	☆ マ C 🔀 - Google	P 🖬 👹	( - 🗈 - 🖡	ŧ	+
ORACLE <sup>®</sup> Entitlements Server				Accessibility Hel Sig	lo Sign ( pred in as i	weblogic
Action Hanagement System Conformation For Action Noise ⊥ In Oter ↓ Conformation Lines ↓ Conformation Noise ↓ Conformation Nois	There  There  Search Resources  Search Resources  OP  Control  Search Resource  Search Resource  Active + New  Search Resource  Active + New  Control  Cont	Description create Collection - Promise TallwyCg. creat		Search	Rese	

**5.** In the **Search Results** section, click **New**. A new tab named **Untitled** opens alongside Search Authorization Policies tab.

Figure 2–12 Search Authorization Policies

Oracle Entitlements Server : Authoriz	atio +		
🗲 @ 10.184.153.13:7701/apm/Yaces/AuthPolicyMgr.js	pi?_afrWindowMode=08c_afrLoop=1990877377279198c_adf.ctrl-state=1018114yu_9	🏫 🔻 😋 🔡 - Google	P 8 8 - D+ + A +
ORACLE' Entitlements Server			Accessibility Heb Sign Out C Signed in as weblogic
Authorization Hasagement System Configur Search () For Appleann Roles =) In OBF =) T2: Browse Search Results	Hore Sarch Resources Sarch Authorization Pole.	<ul> <li>Search Reset</li> </ul>	Find by Target
Action - Ven -	Found Targets         Choose 1 Arget to see inklad Palcies below           Name         [Daplay Name         Description           Name         [Daplay Name         Description           con.ofm.fr. appr. collection.service promisetipory (P) con.ofm.fr. appr. collection.service promisetipory (P) collection         PC Collection	PremiseTailay5pl.create	
V V Authorization Policies V Resource Catalog Optimisers	Policies for: con.ofs.fc.app.colecton.service_prontectopy.PontecToPayApplicatorGerviceSpl.create Actors + Vew +  Phene Com  Defect Name  Interchange Phene Name Tarcets	Principals	Condition Match Oblications

6. In the **Untitled** tab, specify the following values:

Field Name	Value
Effect	Permit
Display Name	<the_application_role_for_whom_grant_is_given_all_caps>_<application_ name&gt;_APPX_COLLECTION_SERVICE_PROMISETOPAY_ PROMISETOPAYAPPLICATIONSERVICESPI_CREATE_ PERFORMWITHOUTAPPROVALS_PL</application_ </the_application_role_for_whom_grant_is_given_all_caps>
Name	<the_application_role_for_whom_grant_is_given_all_caps>_<application_ name&gt;_APPX_COLLECTION_SERVICE_PROMISETOPAY_ PROMISETOPAYAPPLICATIONSERVICESPI_CREATE_ PERFORMWITHOUTAPPROVALS_PL</application_ </the_application_role_for_whom_grant_is_given_all_caps>
Description	<pre><the_application_role_for_whom_grant_is_given_all_caps>_<application_ name="">_APPX_COLLECTION_SERVICE_PROMISETOPAY_ PROMISETOPAYAPPLICATIONSERVICESPI_CREATE_ PERFORMWITHOUTAPPROVALS_PL</application_></the_application_role_for_whom_grant_is_given_all_caps></pre>
Principals	Match - All

 Table 2–6
 Searching Policies - Search Authorization

For example,

LNCOLLECTORDIALER\_OBP\_APPX\_COLLECTION\_SERVICE\_PROMISETOPAY\_ PROMISETOPAYAPPLICATIONSERVICESPI\_CREATE\_PERFORMWITHOUTAPPROVALS\_PL

**a.** In the **Principals** section, click the **Add Principals** icon. The **Search Principal** window appears.

Figure 2–13 Search Principal

ACLE' Entitlements Server		Accessibility Help Sig
Charles Server		Signed in
		-
horization Management System Confi	Wration	
ch 🥑	Home 😳 Search Resources 😳 com.ofss.fc.appx.collect	
	OBP   OBP   Authorization Policies	
+	Untitled	Save Ca
Browse Q Search Results	1 Mar + 10 A	
m = View = 10 Pa	- check (e) Permit (-) Deny	
Cristi	≥ Name & Description	
Amications	Doplay Name Description	
S OFF	* Name	
Role Catalog	40	
Resource Types	Drag & Drop Principals (Roles & Users) to the table below or click the + to add from a Search dialog.	
Extensions		
> 🚱 Default Policy Domain	Match @ Any © All	
7 🚱 🕬	Name	
Authorization Policies	No data to display.	
V C Resource Catalog	Dras & Dras & Dras Taroets (Resources & Entitiements) to the table below or dok the + to add from a Search dialog.	
Chotements		
gr Resources	w larges	
Sa hoha	Name Enabled Actions	
Soa-infra	Com.otiss.tc.appx.colection.service.promoetopay.Pro	
Crade6FMProcessRolesApp		
Crade6PMComposerRolesApp		
	Condition Objectors	
	Click Edd Condition to build a new one	A
	Circle Carl Controllerin (2) Strate 2 Infert one	a cor as ce
	I N	

**b.** In the **Search Principal** window, select Application Roles tab, and then search for the application role which is shipped with the product.

				-
Search Principal				×
Search for Principals and ac	d them to the Selecte	d Items table below.		
Application Role	es 🏻 🏠 Externa	l Roles 🔰 🎽 Use	rs	
Search Default Roles				
Application OBP			-	
Display Name Starts W	/ith 💌			
Name Starts W	/ith 💌			
Category 🔍				
			Search	Reset
Search Results	acted 🛇 Add All			
View - Add Sei	Bala Nama	Description	C-1	
Display Name	Role Name	Description	Category	
No data to display.				
Selected Principals				
View 👻 🚕 Remove S	elected 🛛 🔗 Remove	e All		
Display Name		Name		
	1			
			Add Principals	Cancel

Figure 2–14 Search Principal - Application Roles

c. In the result grid, select Authenticated role and then click Add Principals.

### Figure 2–15 Search Principal

Se	Search arch for F B Aj Search	Principal Principals and ad oplication Role	ld them to the Selecter	d Items table below. I Roles 🛛 🖁 Use	rs	
	Applic	ation OBP			_	
	Display	Name Starts W	/ith 💌 coll			
		Name Starts W	/ith 💌			
	Cati Search I	egory 🗨			Search	Reset
	View 🔻	😵 Add Sele	ected 🛛 😻 Add All			
	Displa	ay Name	Role Name	Description	Category	
	ClnCo	llectorRecov	ClnCollectorRecov	CInCollectorRecov	Primary	•
	ClnCo	ollectorErPmtMd	ClnCollectorErPmtMd	ClnCollectorErPmtMd	Primary	-
	ClnCo	ollectorErLstMd	ClnCollectorErLstMd	ClnCollectorErLstMd	Primary	
	CinCo Rows Se	ected 1	CInCollectionAdmin	CInCollectionAdmin	Primary	Ŧ
Se	elected I	Principals	elected A Remove	All		<b>_</b>
		Name	elected 3 Kelliove	Name		
					Add Principals	Cancel

d. In the Targets section, click the Add Targets icon.The Search Target window appears.

Figure 2–16 Search Targets

		Signed in as web
thorization Management System Config	uration	
rch 🕑	Home 🚳 Search Resources 🚳 conustas fic.appx.colecti 🔀 Search Authorization Pol 🔀 CLIICOLLECTIONADHIB_OBP_AP	
ppication Roles •	CBP   CBP   Authorization Policies	
•	CLNCOLLECTIONADMIN OBP APPX COLLECTION SERVICE PROMISETOPAY PROMISETOPAYAPPLICATIONSERVICESPI CREATE PERFORM PL	Apply Revert 32 Delete
Browse Q. Search Results		
ton v View v 🔽 🔍 🖎	Effect Permit	
Cobal	≤Name & Description	
Applications	Name Description QLACOLLECTIONADMIN_GIP_APPO	
7 The CEP	Name: CUNCOLLECTIONAGMIN. ORP. APPX. COLLECTION.SERVICE. PROMISETOPAY. PROMISETOPAY APPLICATIONSERVICESPL. CREATE. PERFORM PL. PROVISETOP	
Role Catalog		
Resource Types	Drag & Drop Principals (Roles & Users) to the table below or click the + to add from a Search dialog.	
Extensions	± ∰ Principals	+ ×
P ig Default Policy Domain 17 Co. con.	Match O Any @ Al	
Authorization Policies	Nane .	
V 🚯 Resource Catalog	Lig Ciricalecton/dmn	U
Constiements	Drag & Drop Targets (Resources & Entitlements) to the table below or click the + to add from a Search dialog.	
Resources		+ x
- Bi wan-pm	Name Enabled Actions	
Edi babui	Q com. ofss. fc. appx. collection. service. promise borpay. Promise per form	0
Control Statements and the second statements		
	Condition Obligations	
	distance in the second s	Ann Laboration
	Cack tot Condition to build a new one	Edit 💥 Delete

- **e.** In the **Search Targets** window, select the same service for which the policy is configured.
- f. Click Add Targets.

### Figure 2–17 Add Targets

Search Targets	
Search for targets and add them to the selected targets table below.	
Ser Resources	
Search Resource Expression	
Display Name Equals PayApplicationServiceSpi.create	
Name Starts With 💌	
Resource Type Service	
	Search Reset
Search Results	
View 🗸 😒 Add Selected 🛛 💥 Add All	
Display Name Name	
com.ofss.fc.appx.collection.service.promisetopa com.ofss.fc.appx.colle	ection.service.promisetop
Rows Selected 1	
Selected Targets	
View - 💫 Remove Selected 🔗 Remove All	
Display Name Name	
Com. ofss. fc. appx. collection. service. promiset com. ofss. fc. appx. colle	ection.service.promisetor
40	
	Add Targets Cancel
	Add Targets Cancel

The searched target appears in the **Untitled** tab.

Figure 2–18 Target Appears

Firefox *	auto +	- 0
C @ 10.184.150.13:7701/apm/faces/AuthPolicyMgr	spil_af/WindowMode=08k_afrLoop=2576422595075858,adf.ctrl=state=166putpdww.9 🔄 🖉 ⊂ Google	₽ 3 3 - 12 + + + +
ORACLE' Entitlements Server		Accessibility Heb Sign Out Q Signed in as webliogic
Attorization Ranagement Search () 1000		Serri Const

**g.** In the **Targets** section, click the **Expand** arrow for the selected target and select **performWithoutApprovals**.

Figure 2–19 Targets - performwithoutApprovals

		Drag & Drop Targets (Resources & Entitlements) to the table below or dick the + to add from a S	earch dialog.
~	🗑 Targets		
	Name	Enabled Actions	
	7 🐯 com.ofss.fc.appx.collection.service.promisetopay.Promise		
	perform	V performWithoutApprovals	ANY
	Condition Obligations		
c	ick Edit Condition to build a new one		

- h. Click Edit Condition.
- i. Select PromiseToPay\_DaysPastDue attribute.
- j. Click Add.
- **k.** Select the condition.
- I. Select the value for comparison.

Figure 2–20 Condition Builder

Accribaces	Literais		
Name	Display Name	Data Type	
CURRENT_GMT_TIME	current_gmt_time	Time	i
CURRENT_GMT_DATE	current_gmt_date	Date	i
CURRENT_GMT_DATETIME	current_gmt_datetime	Date Time	i
SYS_SUBJECTGROUPS	sys_subjectgroups	String	i
SYS_SUBJECTROLES	sys_subjectroles	String	i
SYS_USER	sys_user	String	i
SYS_APP	sys_app	String	i
SYS_OBJ_TYPE	sys_obj_type	String	i
SYS_OBJ	sys_obj	String	i
SYS_OBJ_Q	sys_obj_q	String	1
SYS_PRIVILEGE	sys_privilege	String	1
ACCESS_SUBJECT	access_subject	String	1
RESOURCE_ID	current_resource_id	String	1
RESOURCE_TYPE_ID	current_resource_type_id	String	i
CURRENT_TIME	current_time	Time	i
CURRENT_DATE	current_date	Date	i
CURRENT_DATETIME	current_datetime	Date Time	i
TransferFundsToBeneficiariesSpi_	TransactTransferFundsToBeneficiariesSpi_TransactionAmount	Integer	i
TransferFundsToBeneficiariesSpi_/	Account TransferFundsToBeneficiariesSpi_AccountAmount	Integer	i
TransferFundsToBeneficiariesSpi_/	Account TransferFundsToBeneficiariesSpi_AccountCurrency	String	i

- m. Click Done.
- n. Click Save.

### 2.1.4 Giving Grant

The grants are configured as part of Day Zero Setup. Please verify whether the grants have been configured or not.

If the grants are not configured, you must provide grants to the application roles that are allowed to work on the PromiseToPayApplicationService. In addition, any new grants have to be configured manually through APM.

Two grants have to be provided. The first grant is for access (perform) and the second grant is for executing the OES rules (perform without approvals).

- 1. Follow the steps from Section 2.1.2, "Editing Conditions on Attribute" and Section 2.1.3, "Adding Policies to Resources" to step f Click Add Targets.
- 2. In the Untitled tab, specify the following values:

Field Name	Value
Effect	Permit
Display Name	AUTHENTICATEDROLE_OBP_APPX_COLLECTION_SERVICE_PROMISETOPAY_ PROMISETOPAYAPPLICATIONSERVICESPI_CREATE_PERFORM_PL
Name	AUTHENTICATEDROLE_OBP_APPX_COLLECTION_SERVICE_PROMISETOPAY_ PROMISETOPAYAPPLICATIONSERVICESPI_CREATE_PERFORM_PL
Description	AUTHENTICATEDROLE_OBP_APPX_COLLECTION_SERVICE_PROMISETOPAY_ PROMISETOPAYAPPLICATIONSERVICESPI_CREATE_PERFORM_PL

Table 2–7 Searching Policies - Giving Grant

- 3. Click Expand in targets for the selected target.
- 4. Select Perform.

5. Click Save.

# **OBIEE Reports Setup**

This chapter provides the process of setting up OBIEE reports. It involves installing Repository Creation Utility and Oracle Business Intelligence 11g.

# 3.1 Installing Repository Creation Utility (RCU)

This section explains the procedure for installing Repository Creation Utility (RCU).

### Prerequisites

Following is the list of prerequisites installing RCU:

- Minimum of 4GB RAM is required. 3GB RAM may also work, but the system may become slow.
- Minimum of 10GB hard disk memory is required.
- Do not use any directory name with space while installing or working with Oracle DB and BI11g.

### Installing RCU

Following are the steps to install RCU:

- **1.** Download the RCU Installation files. Make sure all the zipped files are downloaded correctly and unzipped into a single folder.
- **2.** From unzipped folder for RCU, run the **rcu.bat** file to start the utility. The rcu.bat file is located at rcuHome\BIN directory.

### Figure 3–1 Run rcu.bat file

Address 🛅 C:\OBI Software 11.6\rd	uHome\BIN										
File and Folder Tasks	loadpsp.exe	lxegen.exe	lxinst.exe	mfc71.dll	mkstore.bat	ncomp.bat	netca.bat	netca_dein	nid.exe	oci.dll	ocijdbc11.dll
Other Places 🎗				-	-	-	-	-	-	-	-
Contractions and the second se	orabase.exe	oracle.key	OracleAdN	OracleAdN	OracleAdN	OracleAdN	OracleAdN	OracleAdNe	OracleAdNe	OracleAdNe	OracleAdNe
Shared Documents My Computer My Network Places	SracleAdN	oracleAdN	SracleAdN	OracleAdN	(NoracleAdN	SracleAdN	SracleAdN	oraclient11.dll	oraclsra11.dll	oracommon	oracore11.dll
Details 🛛 🗧	orajmisc.dll	oraldapcint	oraldapjcInt	oralxled.dll	oran11.dll	oranad11.dll	oranbeq11.dll	orancds11.dll	orancrypt11	orancrypt11	orancrypt1
	oranldap11.d	🔊 ا 🕈	oranis11.dil	orannmp11.dll	orannzentr	orannzmcs	orannzsbb	oranoncj11.dll	oranro11.dll	oransgr11.dl	orantcp11.dll
	oraocrb11.d	oraocrutl11.dll	orapki.bat	orapic11.dli	orapip11.dii	orapls11.dll	ORASLAX1	orasnls11.dll	orasql8.dll	orasql11.dll	oraunis11.dll
	oravsn11	oravsn11_s	oravssmsg.dll	oravssmsg	oravssw.exe	orawsec9.dll	orawsec11.dll	orawwg.dll	oraxml11.dll	oraxml.bat	oraxsl.bat
	orcldbserve	ordnetservi	Sutils.dll	owm2.dll	owm.cl	plshprof.exe	rcu.bat	rcuJDBCEn	rman.exe	schema.exe	sclsspawn.exe

3. In the RCU Wizard Welcome page, click Next.

Figure 3–2 RCU Installation Wizard - Welcome page

🕌 Repository Creation Utility	- Welcome	
Welcome		
Welcome		
Create Repository	Welcome to Repository Creation Litility for Oracle Fusion Middleware	
Database Connection Details		
Select Components	The Repository Creation Utility enables you to create and drop component s Oracle Fusion Middleware.	schemas that are part of
Schema Passwords		
V Map Tablespaces		
y Summary		
Completion Summary		
	Skip this Page Next Time	
	Messages:	
Help	< Back	Next > Einish Cancel

4. In the Create Repository page, select the **Create** option and click **Next**.

Figure 3–3 Create Repository



**5.** In the Database Connection Details page, select the **Oracle Database** option from the **Database Type** list and enter the details.

For example: Host Name: localhost Port: 1521 Service Name: ORCL Username: sys Role: sysdba Password: MyPassword123

Figure 3–4 Database Connection Details

atabase Connection Details	5	
Vielone Could Recordery Parkerse Connection Details Solarna Frenzenzen Map Telespaces Scheme Pyterwords Map Telespaces Schemery Completion Summery	Distribution Type: Host Name: Papt Service Name: Deconvent Bale: Mexanges:	Cincide Database Construct Construc
Helo		«Back Bext» Brigh Cancel

**6.** If a warning message appears for using the Oracle database, click **Ignore** and continue with the installation.

*Figure 3–5 Warning message* 



7. Click OK after RCU validates and initializes database configuration.

Figure 3–6 Checking Global Prerequisites

Initializing repository configuration metadata	00:01.640(sec)
Obtain properties of the specified database	00:00.110(ms)
Check requirement for specified database	00:21.797(sec)
Execute pre create operations	00:01.875(sec)

**8.** In the Select Components page, set the prefix to create the metadata schema in the **Create a new Prefix** field.

By default, the DEV value appears as the prefix. You can change it as per your requirement.

Figure 3–7 Select Components

<ul> <li>Vestorme</li> <li>Greate Reportary</li> <li>Database Correction Database</li> </ul>	A Pretix groups the components as	ssociated with one deployment		
Database Connection Details.	the second se	From 1		
	O Greate a new metric	LEV.		
Select Components		Prefix can contain only a	upha-numeric characters. Pretic should	nat
Scherne Perzwordz		start with a number and	provision of contrain any special characte	MD.
Map Tablespaces	Component		Schema Owner	
Surray	B Oracle AS Repository	Components		
Constitution Constants	GMAS Common Sche	nn as		
Compression and it may	Metadata Services		DEV_MDS	
	Li Audit Services		AU .	_
	LI Audit Services For OES		MUDES 500	_
	Concello Stationer Service		E55	
	El Uracie Planotth Security Services		0988	_
	E WabCentat Conta	nt.		-
	HEI Oracio Data Intern	ator		-
	Cracle Business I	ntelligence	and the second second second	
	E Business Intel	igence Platform	DEV BIPLATFORM	
	Gillional anti-Communi	states Castron		_

- **9.** Select the appropriate schemas and click **Next**.
- **10.** Click **OK** after the schema creation prerequisites check is completed.

Figure 3–8 Checking Component Prerequisites

cang Component Prerequisites	
Metadata Services	00:00.110(ms)
Business Intelligence Platform	00:00.110(ms)
Dualifesa intelligence riauonni	00.00.110(11

11. In the Schema Passwords page, enter the password for all schemas and click Next.

### Figure 3–9 Schema Passwords

ichema Passwords				
Vielone Orade Reportory Distance Connector Databa Sect Concerna Sect Concerna Sect Concerna Sect Concerna Sector S	Prence enter the passwords for th numbers and the following special character.	e nain and additional (auxiliar i characters: \$, # , _ Passwo charact for auxiliary schemes or all schemes	() schem users. Password d should not start with a nu	3 cen contein alphaliets, arber or a special
	Component Metadota Services Business Intelligence Platform	Schene Owner DEV_MOS DEV_BPLATFORM	Schere Paceword	Confirm Paceword
	Mezzagen:			
Helo			< Back Next>	Brish Cance

**12.** In the Map Tablespaces page, click **Next** to create tablespaces for the selected schemas.

Figure 3–10 Map Tablespace

fap Tablespaces		يغدر		ORACLE 118
Y Welcome Y, Greate Reportiony	Choose taklespaces for the balow. To create new taklespaces	selecteril components. The or modify existing tablespo	e detauit and temporary tables aces click the Wannye Tables	vaces are specified in the table vaces' button.
Database Convector Datails	Component	Schema Owner	Default Table space	Temp Tablespace
Colord Comments	Metadata Sentces	DEV MDS	*DEV MDS	*DEV IAS TEMP
Seet Corporates	Business Intelligence -	DEV_BIPLATFORM	*DEV_BIPLATFORM	*DEV_LAS_TEMP
	Perfault tablessages (spec	ried in the configuration fil	es) are to be created upon co	tiredan 🚺
	*Default tablespaces (spec	field in the configuration fil	es) are to be created upon co	nfrendion .
	Cernut tablespaces (open	field in the configuration fil	eo) are to be created upon co	rrienation.
	Certruit totilespaces (spec	fied in the configuration fil	es) are to be created upon co	nfirmation . Mannye Taklespace

**13.** Click **OK** to confirm tablespace creation.

Figure 3–11 Confirmation message



14. Click **OK** after the tablespace is validated and created.

Figure 3–12 Validating and Creating Tablespaces



**15.** In the Summary page, click **Create**. RCU creates the required schema objects within the tablespaces.

Figure	3–13	Summary
--------	------	---------

Repository Creation Utility	Step 6 of 7 : Summary			
<ul> <li>Yirkann</li> <li>Conto Dependery</li> <li>Database Correction Databa</li> <li>Salest Corporatis</li> <li>Scheme Dezewortis</li> <li>Han Juliansmons</li> </ul>	Database details: Hast Name: localhost Port 1521 Service Name: OPCL Connected Ax: sys Operation: Create Prefix for (prefixable) Scheme Ow	mars.DEV	PUSID	N MIDDLEWARE
Summary	Component	Schena Owner	Tablespace Type	Tablespace Name
Completion Stemmery	Metadata Servicex	DEV_BOLATION	Detu& Terp Addional Detu& Terp Addional	DEV_JAG DEV_JAG_TEMP None DEV_DEFLATFORM DEV_JAG_TEMP None
Helo			«Back Next»	Create Cance

**16.** In the Completion Summary page, click **Close**. The RCU installation process is complete.

### Figure 3–14 Completion

Repository Creation Utility	Step 7 of 7 : Completion Summ	ary		
Vilácome Covade Pispostiony Database Connection Details Select Componente Scheme Perswonde. Mep Tablespeces Summery	Database definit: Hoath Name: local Pott 152 San vice Name: OPE Connected As 0% Operation: Cheek ROL Logif Log Directory: DVSRV Denotion Time: 455 Pretto for (prefoable) Scheme Owne	hood 1 L Inverse/OBI11.1.1.6.0v news/OBI11.1.1.6.0vecu conds ers.DEV	ou-tonetrovikogikogde 2012- Hometrovikogikogde 2012-	12-03-28_13-04Vou.log 03-28_13-04
Comparison summary	Component Metadata Serviceo Business Intelligence Plettore	Statux Success Success	Logtle exito log opletform log	Time: 00:04.391(sec) 00:10.031(sec)
1540			«Beck Box	t> ] Grente ] Qoos

## 3.2 Installing Oracle Business Intelligence 11g

This section explains the procedure for installing Oracle Business Intelligence 11g 11.1.1.7.0. BI 11g is standardized with Oracle fusion middleware and hence leverage database for metadata storage just like any other middleware product. The following steps explain the installation of BI11g metadata schema on Oracle database. Same process can be leveraged to install metadata schema on other supported databases as well.

Following are the steps to install OBIEE 11g:

1. Download the OBIEE 11g version from the following location.

http://edelivery.oracle.com/

- 2. Extract all the four disk into a single folder.
- **3.** From Disk 1, click the **setup.exe** file.

Oracle Universal Installer checks for the initial set up and system requirement.

Figure 3–15 Oracle Universal Installer



4. After successful checks, the OBIEE Installation wizard opens. Click Next.

Figure 3–16 OBI Installation Wizard - Welcome page



- **5.** In the Install Software Updates page, do either of the following and then click **Next**:
  - If you have Oracle Support username and password, enter the credentials.
  - If not, select the **Skip Software Updates** option.

Figure 3–17 Install Software Updates

Oracle Business Intelligence 11	lg 11.1.1.7.0 - Step 2 of 14 pdates	DRACLE: 118
	Skip Software Updates   Search My Oracle Support for Updates   Usgr Name:   Password:   Proxy Settings   Search Local Directory for Updates   Local Directory:   Search For Updates	est Connection
Help	< <u>B</u> ack <u>N</u> ext	Einish Cancel

**6.** In the Select Installation Type page, select the appropriate installation type. To install all components of BI, select the **Enterprise Install** option. Click **Next**.

Figure 3–18 Select Installation Type



**7.** In the Prerequisite Checks page, click **Next** after the check for operating system certification and physical memory are completed.



Oracle Business Intelligence 11g 11.1.1.7.0 - Step 4 of 15         Prerequisite Checks         ORACLE FUSION MIDDLEWARE					
Welcome	Selection	Check	Progress	Status	
Skip Software Updates	V	Checking operating system certification	100%	~	
Enterprise Install	V	Checking physical memory	100%	1	
Specify Installation Locatic     Configure Components     BIPLATFORM Schema     MDS Schema     Configure Ports				Cantinua	
Security Updates		<u></u>	Retry		
Security Updates         Summary         Installation Progress         Configuration Progress					
Help		< <u>B</u> ack	<u>N</u> ext > Einis	sh Cancel	
			E	apsed Time: 1m 49s	

**8.** In the Create or Scale Out BI System page, for a new installation, select the **Create New BI System** option.

Figure 3–20 Create or Scale Out BI System

Oracle Business Intelligence 11	g 11.1.1.7.0 - Step 5 of 15				
Create or Scale Ou	it BI System		<b>11</b> <i>g</i>		
Welcome     Skip Software Updates	Oreate New BI System	n			
Enterprise Install	User Name:	weblogic			
Prerequisite Checks	User <u>P</u> assword:	•••••			
Create New BI System	Confirm Password:	•••••			
Specify Installation Location	Domain Name:	bifoundation domain			
<u>Configure Components</u> <u>BIPLATFORM Schema</u> <u>MDS Schema</u> Outform Budg	○ Scale Out BI System				
Security Updates					
Summary     Installation Progress     Configuration Progress	gress Grogress Grogre				
Help		< Back Next > Einish	Cancel		
		Elapse	d Time: 2m 29s		

9. Set the password for the weblogic user and click Next.

\_

**Note:** Remember this password as it is later used to access BI system, EM, and Console.

**10.** In the Specify Installation Location page, in the Oracle Middleware Home Location field, browse and select the actual folder where the BI 11g must be installed. Once the home location is selected, the other fields are automatically filled. Click **Next**.



Oracle Business Intelligence 11	g 11.1.1.7.0 - Step 6 of 15		- • ×		
Welcome					
Skip Software Updates     Enterprise Install	Oracle Middleware Home Location:	C:\OBIEE11g	Browse		
Prerequisite Checks	Oracle Home Directory:	Oracle_BI1			
Create New BI System     Specify Installation Loc	Weblogic Server Directory:	C:\OBIEE11g\wiserver_10.3			
<u>Configure Components</u>	Domain Home Location:	jects\domains\bifoundation_domain	Browse		
BIPLATFORM Schema     MDS Schema	Oracle Instance Location:	C:\OBIEE11g\instances\instance1	Browse		
Configure Ports	Or <u>a</u> cle Instance Name:	instance1			
Security Updates     Summary     Installation Progress     Configuration Progress	Security Updates Summary Installation Progress Configuration Progress				
Help     < Back					
		Elap	sed Time: 3m 24s		

**11.** If a warning message appears, click **Yes**.

Figure 3–22 Warning message



**12.** In the Configure Components page, view the components that are going to be installed. By default, all the components are selected. You can deselect the components, if not required. Click **Next**.

Figure 3–23 Configure Components

Oracle Business Intelligence 11	Oracle Business Intelligence 11g 11.1.1.7.0 - Step 7 of 15					
Configure Compo	nents	FUSION MIDDLEWARE 118				
Welcome     Skip Software Updates     Enterprise Install     Prerequisite Checks     Create New BI System     Specify Installation Locatic     Configure Components     BIPLATFORM Schema     MDS Schema     Configure Ports     Security Updates	Oracle Business Intelligence     Susiness Intelligence Enterprise Edit     Business Intelligence Publisher     Real-Time Decisions     Essbase Suite	tion				
Summary     Installation Progress     Configuration Progress	Select the components to configure as part of t	he installation process.				
Help	< <u>B</u> ac	ck Next > Finish Cancel				
		Elapsed Time: 4m 9s				

**13.** In the BIPLATFORM Schema page, select the database where the RCU is installed from the **Database Type** list and enter the following details.

For example:

Database Type: Oracle Database

Connect String: dbservername:portnumber:servicename

BIPLATFORM Name: DEV\_BIPLATFORM

BIPLATFORM Password: Admin123

**Note:** The username and password are the same that were set during installation of RCU.



Oracle Business Intelligence 11	g 11.1.1.7.0 - Step 8 of 1	5	(and	
BIPLATFORM Sche	ema			DDLEWARE 118
Welcome     Skip Software Updates     Enterprise Install	<u>D</u> atabase Type	Oracle	Database	
Prerequisite Checks Create New BI System Create New BI System	<u>C</u> onnect String	Bose-PC	0:1521:orcl	
Configure Components     BIPLATFORM Schema	BIPLATFORM Schema U	sername	DEV_BIPLATFORM	
<u>MDS Schema</u> <u>Configure Ports</u> <u>Security Updates</u>	BIPLATFORM Schema P	assword	•••••	
Summary     Installation Progress	Enter the BIPLATFORM s	chema passwo	ord.	
Contiguration Progress			< <u>B</u> ack <u>N</u> ext >	Einish Cancel
				Elapsed Time: 4m 54s

**14.** In the MDS Schema, select the database and enter the details as done in previous step. Here, the username will be DEV\_MDS. Click **Next**.

Figure 3–25 MDS Schema

Oracle Business Intelligence 11g 11.1.1.7.0 - Step 9 of 15	
MDS Schema	
<u>Welcome</u> <u>Skip Software Updates</u> <u>Database Type</u>	Oracle Database
Prerequisite Checks Create New BI System Specify Installation Location	ose-PC:1521:orc
Configure Components     BIPLATFORM Schema	DEV_MDS
MDS Schema     MDS Schema <u>Password</u> <u>Configure Ports</u> <u>Security Updates</u>	•••••
Summary     Installation Progress     Configuration Progress     Configuration Progress     Most1:port1:instance1^host2	rmat hostname:port:servicename for the Oracle e Oracle Business Intelligence Enterprise Edition sitory Creation Utility (RCU). For Application Cluster port2:instance2@servicename.
	< <u>Back</u> <u>Next</u> <u>Finish</u> Cancel

**15.** In the Configure Ports page, select the **Auto Port Configuration** option to install using default port numbers, as usually done for Oracle installations. Click **Next**.

Figure 3–26	Configure	Ports
-------------	-----------	-------

Oracle Business Intelligence 11	g 11.1.1.7.0 - Step 10 of 15		
Configure Ports			
Welcome     Skip Software Updates     Enterprise Install     Prerequisite Checks     Create New BI System     Specify Installation Locatic     Configure Components     BIPLATFORM Schema     MDS Schema     Configure Ports     Security Updates     Summary	Auto Port Configurat     Specify Ports using     Eile name:	ion Configuration file C:\Users\Bose\staticports.ini View/Edit File	Browse
Configuration Progress			
Help		< <u>B</u> ack	Elapsed Time: 5m 24s

**16.** In the Specify Security Updates page, do either of the following:

• If you have Oracle Support email address, provide it to receive information about security issues and click **Next**.

Figure 3–27 Specify Security Updates

Oracle Business Intelligence 11	g 11.1.1.7.0 - Step 11 of 15	
Specify Security U	pdates	FUSION MIDDLEWARE
Welcome         Skip Software Updates         Enterprise Install         Prerequisite Checks         Create New BI System         Specify Installation Locatic         Configure Components         BIPLATFORM Schema         MDS Schema         Configure Ports         Security Updates         Summary         Installation Progress         Configuration Progress	Provide your email address to be informed of and initiate configuration manager. <u>View detail</u> Email:	security issues, install the product is. bu if you use your My Oracle Support ss/username. Oracle Support. Cracle Support. Ck Next > Finish Cancel
		Elapsed Time: 5m 54s

• If you do not wish to receive updates, deselect the check box, click **Next**, and click Yes in the warning message.

Figure 3–28 Warning message

My Oracle Sup	port Username/Email Address Not Specified
<u>\</u>	You have not provided an email address. Do you wish to remain uninformed of critical security issues in your configuration?
	Yes No

- **17.** In the Summary page, view the configuration and click **Next**.
- **18.** In the Installation Progress page, view the progress bar till it shows 100% complete. Post installation script may take some time.





**19.** After successful installation, in the Configuration Progress page, view the progress of the configuration till it shows 100%. Click **Next**.

Figure 3–30 Installation Successful



**20.** In the Complete page, click **Save** to save the path details for middleware home, domain home, and others in a file for reference.





- 21. Click Finish to complete the installation and configuration.
- 22. Browse through EM and console to play with BI.



Figure 3–32 OBI Interface

**23.** Save configuration.

**Configure Components**: Configure the following components:

- WebLogic Console: http://IP-ADDRESS.in.oracle.com:7001/console
- Oracle Enterprise Manager: http://IP-ADDRESS.in.oracle.com:7001/em
- Business Intelligence Enterprise Edition: http:// IP-ADDRESS.in.oracle.com:9704/analytics
- Business Intelligence Publisher: http: // IP-ADDRESS.in.oracle.com:9704/xmlpserver
- Real-Time Decisions: http:// IP-ADDRESS.in.oracle.com:9704/ui
- Calculation Manager: http://IP-ADDRESS.in.oracle.com:9704/workspace
- Financial Reports: http: // IP-ADDRESS.in.oracle.com:9704/workspace
- Workspace: http: // IP-ADDRESS.in.oracle.com:9704/workspace
- Essbase Suite
- APS: http://IP-ADDRESS.in.oracle.com:9704/aps
- Essbase Server
- Essbase Studio: IP-ADDRESS.in.oracle.com
- Essbase Administration Services: IP-ADDRESS.in.oracle.com:9704

# 3.3 Copying RPD and Reports

This section explains the steps to copy RPD and reports.

### 3.3.1 Reports Setup

This section explains the steps for Reports setup.

### Step 1

Create a temporary directory (for example, TEMPDIR) on the OBI Server using the following command:

mkdir TEMPDIR

### Step 2

Copy the OBP Collections 2.4.1 reports installation package, collection\_reports.zip, which you have downloaded from the edelivery to TEMPDIR by using WINSCP.

### Step 3

Uncompress the Collection\_V24[Build\_Number].zip file using the following command:

cd <PATH>/TEMPDIR

unzip collection\_reports.zip

Where, <PATH> is the path where the TEMPDIR folder is located.

### Step 4

Copy collectionreports folder and collectionreports.atr to the shared location by following commands:

```
cp -r collectionreports ${middleware_home}/instances/${instace_
name}/bifoundation/OracleBIPresentationServicesComponent/coreapplication_
obips1/catalog/SampleAppLite/root/shared/
```

```
cp -r collectionreports.atr ${middleware_home}/instances/${instace_
name}/bifoundation/OracleBIPresentationServicesComponent/coreapplication_
obips1/catalog/SampleAppLite/root/shared/
```

### 3.3.2 Day 0 Setup

This section explains the steps for Day 0 Setup.

### Step 1

Take a backup of existing localedefinitions.xml by following command:

```
mv ${middleware_home}/ Oracle_
BI1/bifoundation/web/display/localedefinitions.xml ${middleware_home}/
Oracle_BI1/bifoundation/web/display/localedefinitions.xml_bk
```

### Step 2

Take a backup of existing instanceconfig.xml by following command:

mv \${middleware\_home}/ instances/\${instance\_name}/ config/OracleBIPresentationServicesComponent/coreapplication\_ obips1/instanceconfig.xml \${middleware\_home}/ instances/\${instance\_name}/ config/OracleBIPresentationServicesComponent/coreapplication\_ obips1/instanceconfig.xml\_bk

#### Step 3

Copy localedefinitions.xml and instanceconfig.xml to server by following commands:

cp Day0/ localedefinitions.xml \${middleware\_home}/ Oracle\_ BI1/bifoundation/web/display/

cp Day0/ instanceconfig.xml \${middleware\_home}/ instances/\${instance\_ name}/ config/OracleBIPresentationServicesComponent/coreapplication\_ obips1/

### 3.3.3 RPD Deployment

This section explains the steps for RPD Deployment.

### Step 1

Unzip collection\_reports.zip folder from local Windows machine.

#### Step 2

Open RPD "CollectionMutipleFacts.rpd" present inside folder RPD using Oracle BI Admin Tool.

### Step 3

Update the DB source name and the user credentials in the Connection Pool of the repository and set it to the Analytics DB.

Figure 3–33 Update source name and user credentials

Online) Oracle 81 Administration Tool - OR_DW	The second se	
File Edit View Manage Tools Diagram Window Help		
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Presentation	Business Model and Mapping	Physical
+ Application	F BL Acciention	I R D CREDEV
(* 1 Product Group	8 B Product Group	Data_Connection_Pool
(R 10 Submission	8 😳 Submission	- 🛃 Vatables_Connection_Pool
E Task	E U Tark	B A NGPINTRST
	Connection Pool - Data_Connection_Pool	
	General Connection States 1 201. 1 Write Back 1 Monitorenus 1	
		1
	Name: Disa Connection Ros Pemissions	
	Calinterface: [Default (OCI 10g-11g) ·	
	Maximum connections: 10_1	
	F Require fully qualified table names	
	Data source name: OEPDEV	
	P Shared logon	
	User name: NGPINTRST Password:	
	E Fostile connection southers	
	Tanad K. [http://www.inter.com	
	Presentes a sounded	
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	Isolation level: Unitsut	
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	OK Canoel Help	
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1		

### Step 4

Add the analytics DB TNS entry.

Add the TNS entry for the analytics DB in the tnsnames.ora file at location ORACLE\_HOME/network/admin

### Step 5

Upload the repository to the OBI server as follows:

- **1.** Log in to the OBI server EM console.
- **2.** Navigate to Business Intelligence -> coreapplication -> Deployment ->Repository tab.
- 3. Click Release Configuration.
- 4. Click **Upload** and select the repository to be uploaded.
- **5.** Enter the repository password.
- 6. Click Apply.
- 7. Restart the OBI server components.

Figure 3–34 Upload repository to OBI server

ORACLE Enterprise Manager	11g Fusion Middleware Control	Setup + Help + 1
📳 Farm 👻 🦂 Topology		
<ul> <li>▼ ∰ Farm_bifoundation_domain</li> <li>► Not and action Tanks much</li> </ul>	Corecapplication      with a statistical state in the state is a state of the state	Logged in as web Page Refreshed 05-Aug-2014 28:11:04 21
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### Step 6

Open **Oracle Enterprise Manager, Business Intelligence Enterprise Edition** only on Mozilla browser.