

BIP Installation Guide

Oracle Financial Services Lending and Leasing

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BIP Installation Guide
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1. Preface

This document contains notes and installation steps needed to install and Configure Oracle BI Publisher. Oracle Financial Services Lending and Leasing relies on this software to configure reports and this document is in no way meant to replace Oracle documentation supplied with this Oracle product or available via Oracle technical support. The purpose of this document is only meant to supplement the Oracle documentation and to provide Oracle Financial Services Lending and Leasing specific installation instructions.

For recommendations on security configuration, refer Security Configuration Guide.

BI Publisher installation is a four step process.

1. [Installing BI Publisher](#)
2. [Configuring BI Publisher](#)
3. [Creating Unique BI Publisher User](#)
4. [Creating BI Publisher Datasource](#)

1.1 Prerequisites

The following software are required to install Oracle Financial Services Lending and Leasing application and they are available from the following sources:

- Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>)
 - Oracle Technology Network (OTN)
1. Sun JDK Version 1.8.0_66 or above (<http://www.oracle.com/technetwork/java/javase/downloads/index.html>)
 2. Oracle WebLogic Server 12c Version 12.2.1.0.0
<http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-main-097127.html>)
 3. Oracle BI Publisher Version BI 12.2.1.0.0
<http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>

Note

Please use all 64-bit software's for machine hosted with 64-bit O/S.

1.2 Audience

This document is intended for system administrators or application developers who are installing Oracle Financial Services Lending and Leasing Application.

Conventions Used

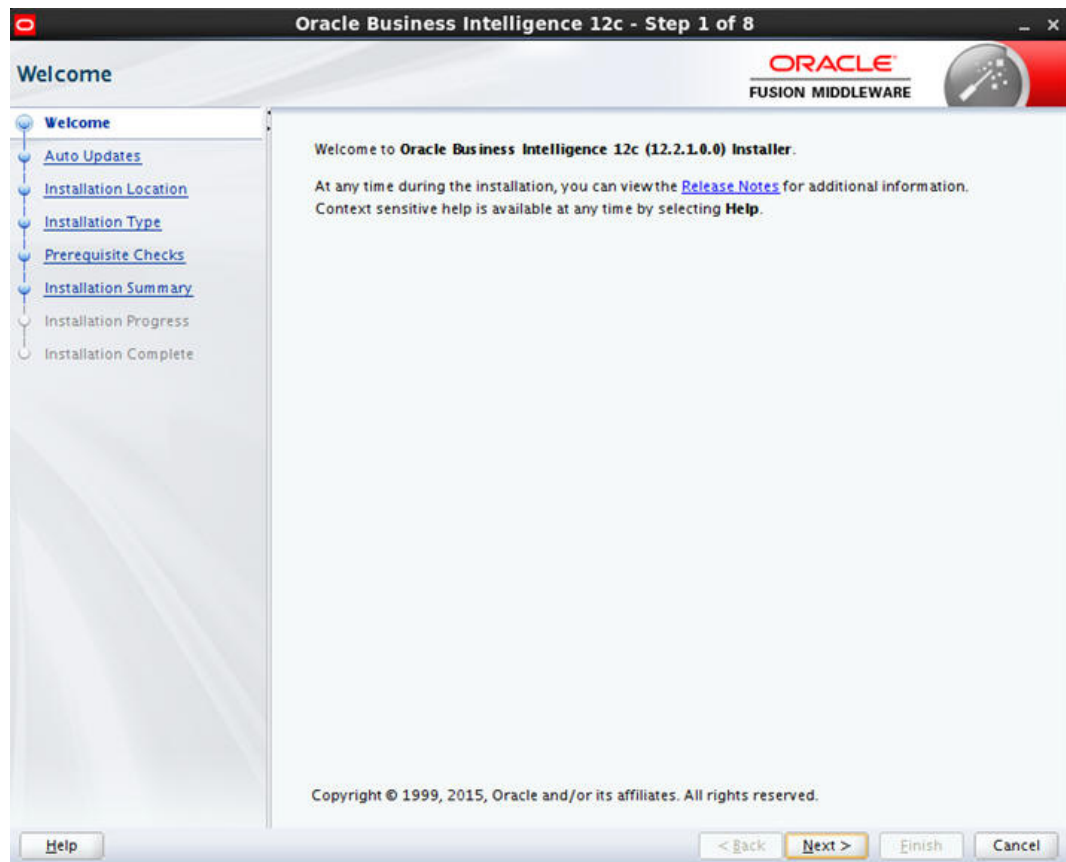
Term	Refers to
Home Directory/ \$OFSLL_HOME	Oracle Financial Services Lending and Leasing Home Directory

2. Installing BI Publisher

2.1 Installing BI Publisher

Follow the below steps to install BI publisher:

1. Download and unzip all the software related to OBIEE (2 zip files).
 - fmw_12.2.1.0.0_bi_linux64_Disk1_1of2.zip
 - fmw_12.2.1.0.0_bi_linux64_Disk1_2of2.zip
2. Navigate to bin file
3. Run ./bi_platform-12.2.1.0.0_linux64.bin
4. The following window is displayed.

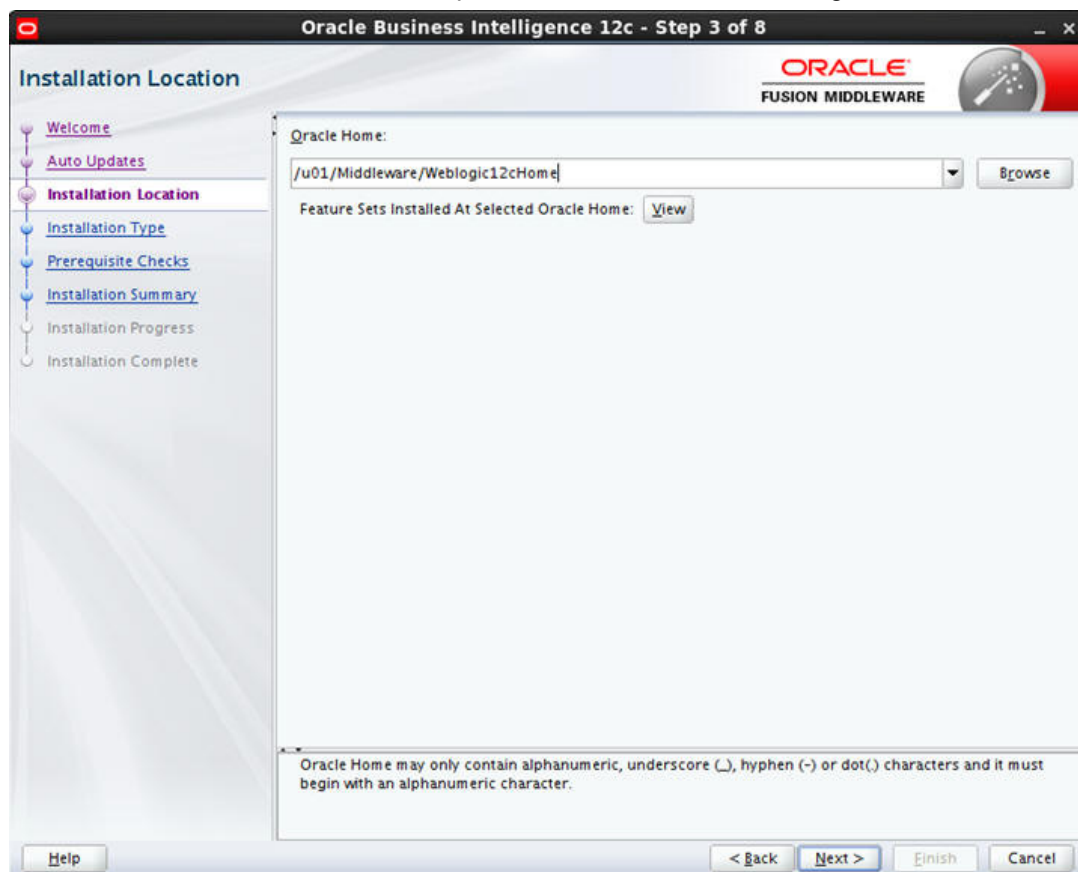


5. Click 'Next'. The following window is displayed.

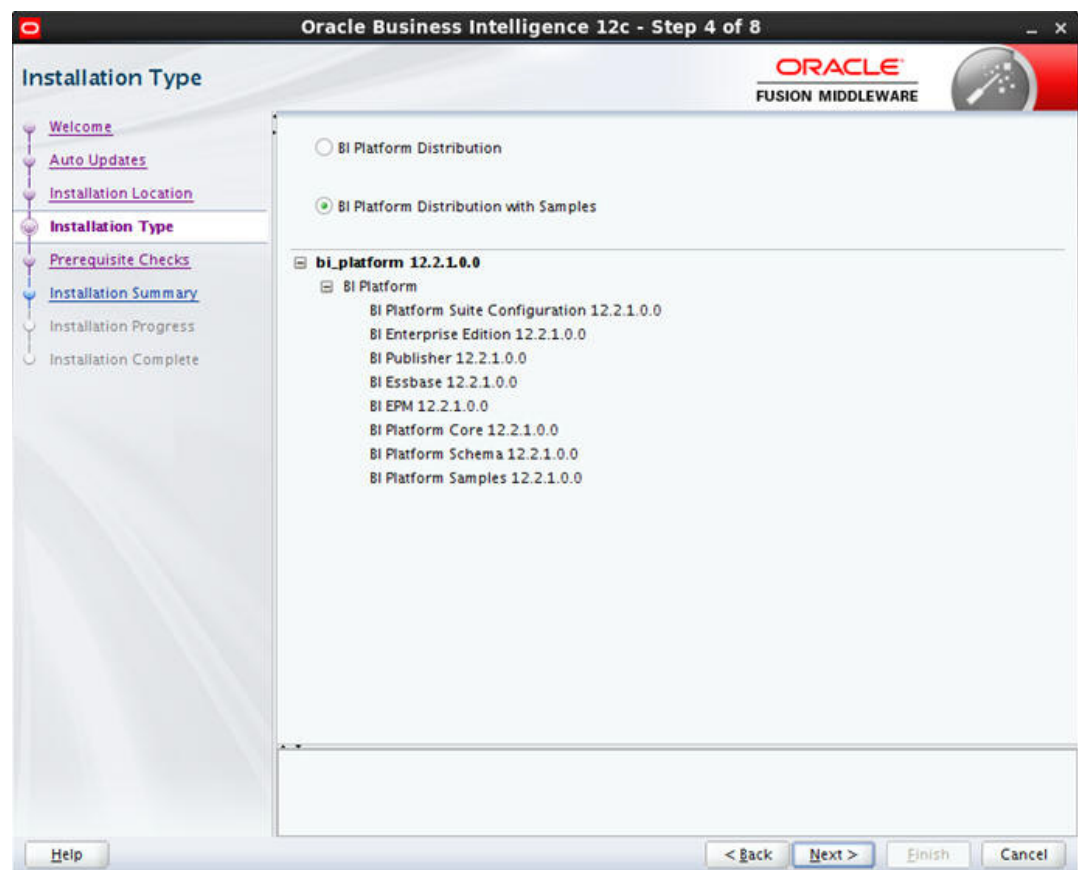
6. Select the option 'Skip Software Updates' and click 'Next'. The following window is displayed.

The screenshot shows the 'Auto Updates' window in the Oracle Business Intelligence 12c installation wizard. The window title is 'Oracle Business Intelligence 12c - Step 2 of 8'. The Oracle Fusion Middleware logo is in the top right corner. On the left, a navigation pane lists the steps: Welcome, Auto Updates (selected), Installation Location, Installation Type, Prerequisite Checks, Installation Summary, Installation Progress, and Installation Complete. The main area contains two radio button options: 'Skip Auto Updates' (selected) and 'Select patches from directory'. Below the second option is a 'Location' text box and a 'Browse' button. A third radio button option, 'Search My Oracle Support for Updates', is also present. Below it are 'Username' and 'Password' text boxes, a 'Proxy Settings' button, and a 'Test Connection' button. A 'Search' button is located below the 'Test Connection' button. A large empty rectangular box is at the bottom of the main area. At the bottom of the window, there are four buttons: 'Help', '< Back', 'Next >', 'Finish', and 'Cancel'.

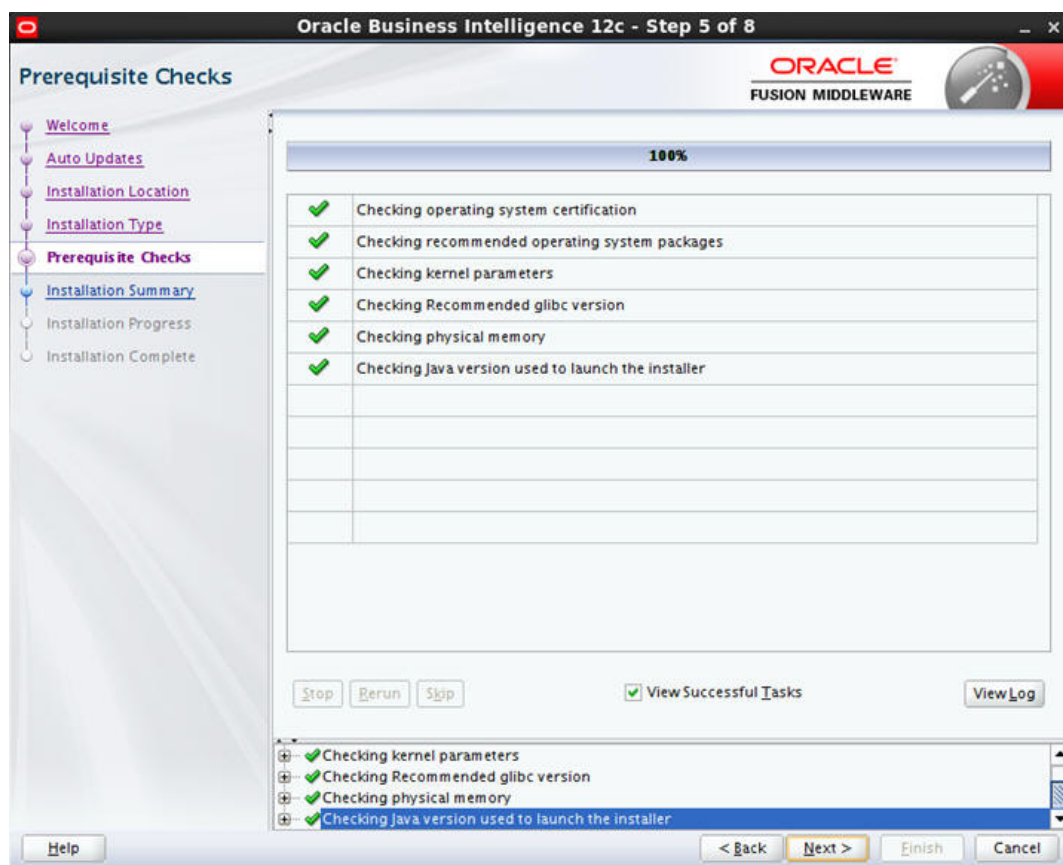
7. Browse Oracle Middleware Home path as /u01/Middleware/Weblogic12cHome.



8. Select the option 'BI Platform Distribution with Samples' and Click 'Next'.



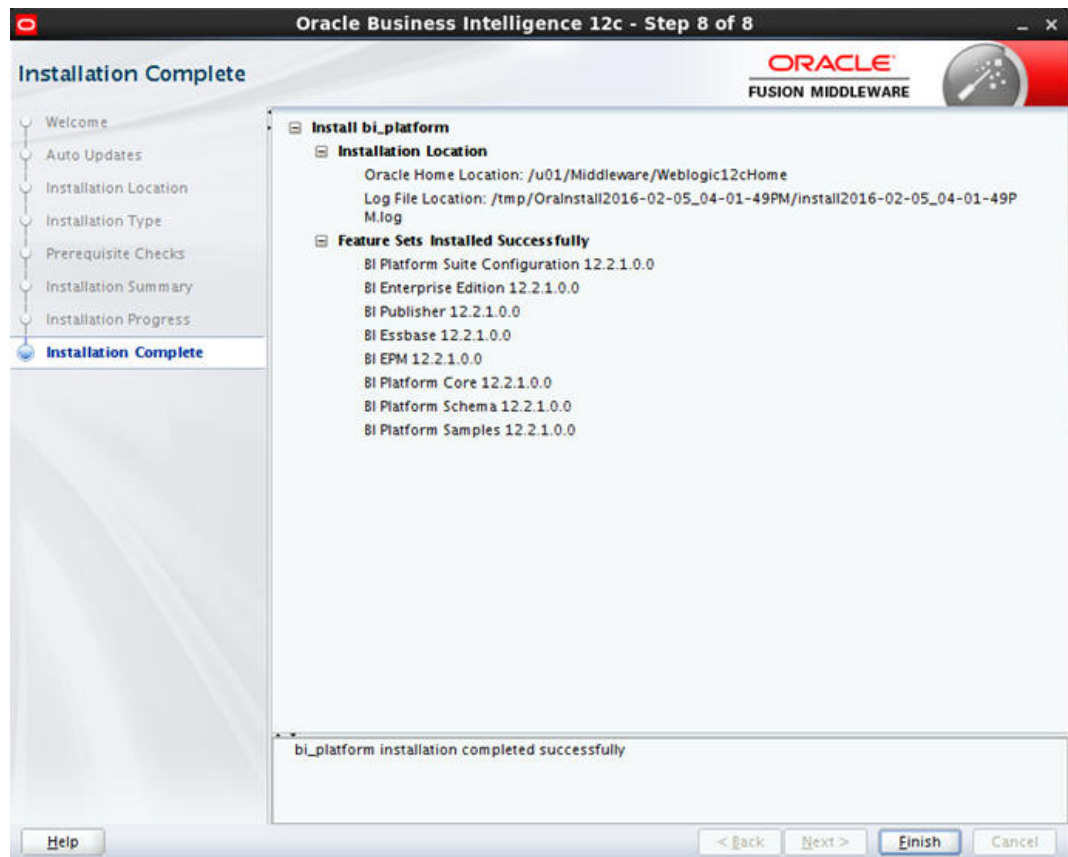
9. Click 'Next'. The following window is displayed.



10. Click 'Install'. The following window is displayed.



11. Once the installation is complete click 'Next' and then click 'Finish' to close.

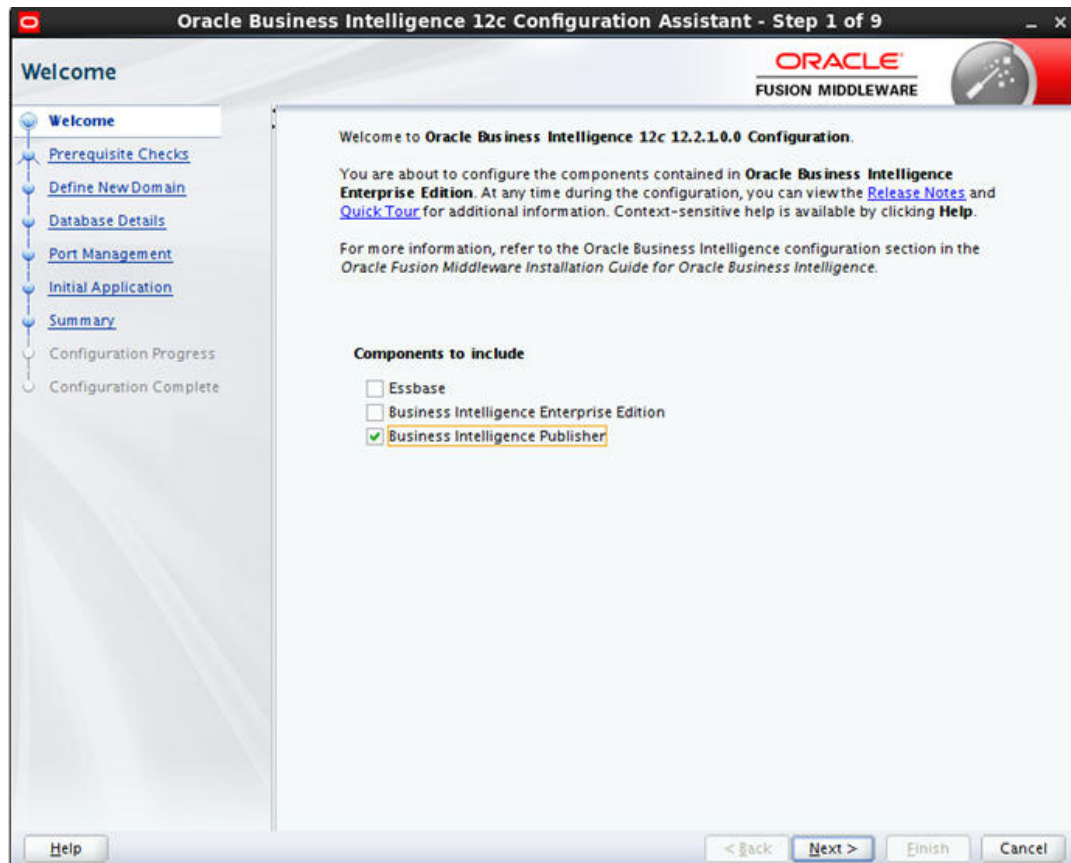


3. Configuring BI Publisher

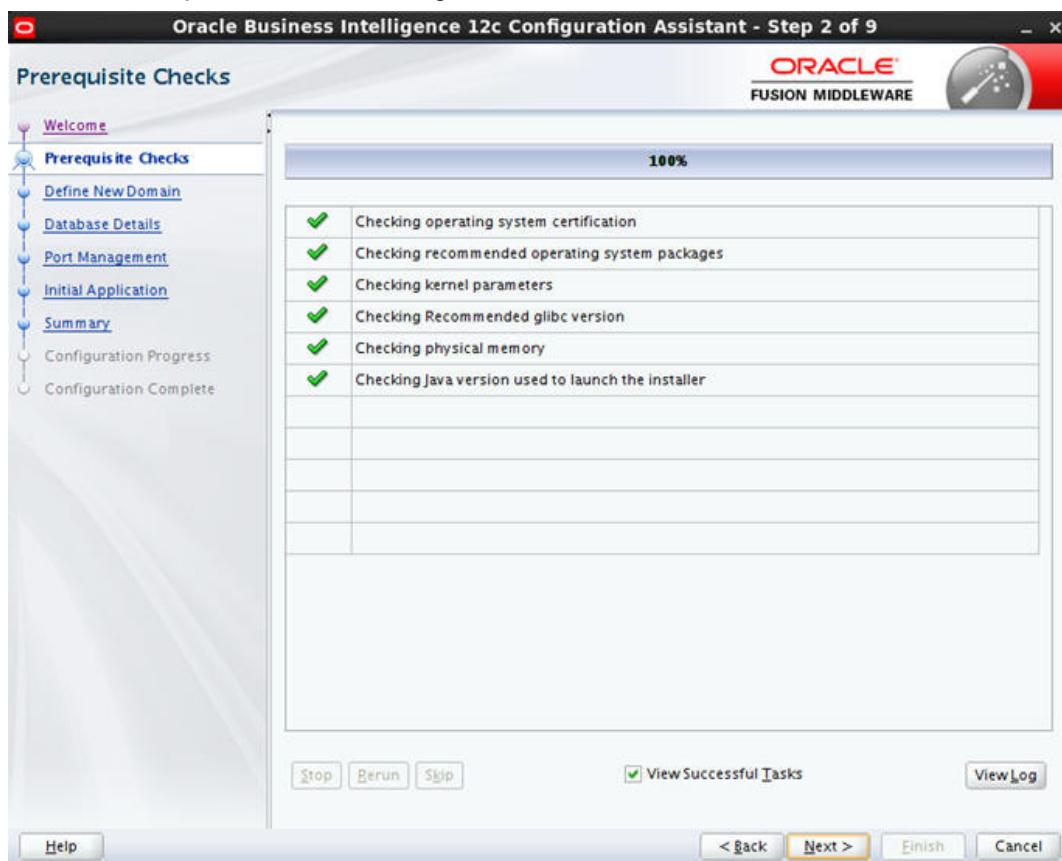
After installing BI Publisher, the next step is to configure BIP.

To configure BIP

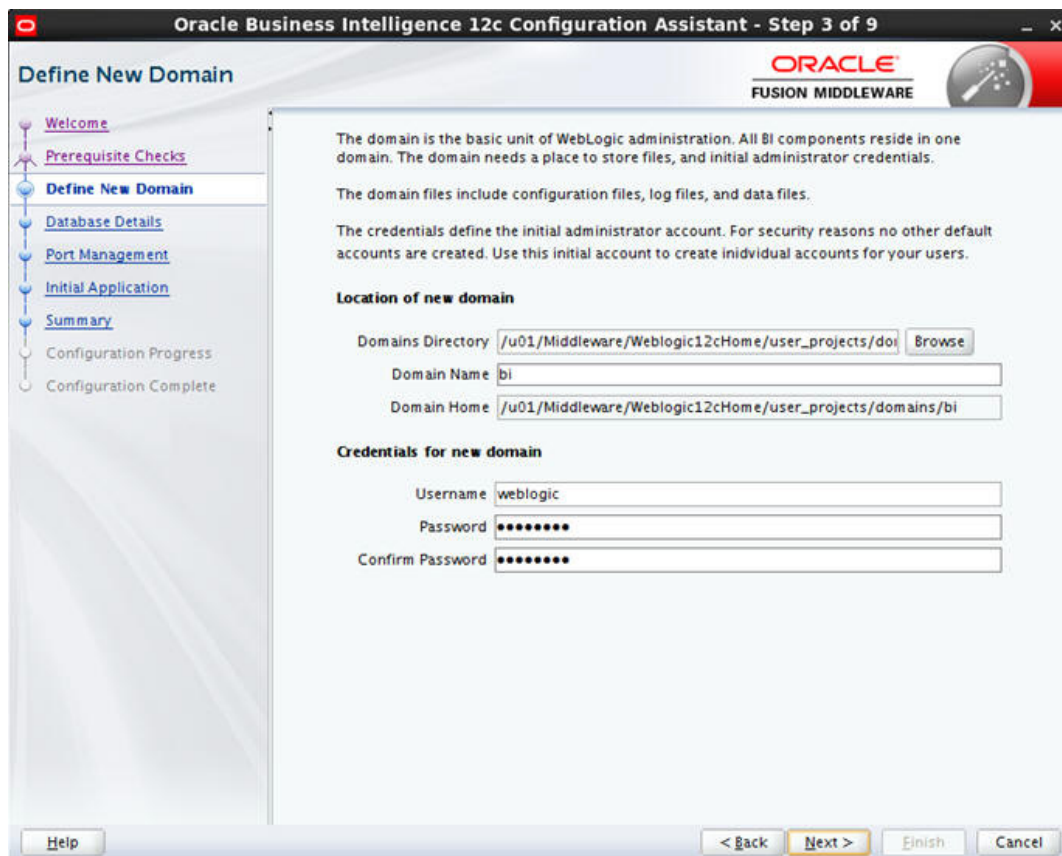
1. Launch configuration window and browse to \$BI_HOME/bin (BI_HOME is //u01/Middleware/Weblogic12cHome/bi).
2. Run ./config.sh. The following window is displayed.



3. Select the option 'Business Intelligence Publisher' and Click 'Next'.



4. Click 'Next'. The following window is displayed.



5. Enter the User Name, Password and Domain Name for BI Publisher domain. Click 'Next'. The following window is displayed.

Oracle Business Intelligence 12c Configuration Assistant - Step 4 of 9

Database Schema

Database schemas are required for storage of internal housekeeping information. These schemas are distinct from any data sources which you plan to analyse in BI.

The simplest option is to create new database schemas here. Alternatively you can use existing schemas you created earlier using the Repository Creation utility (RCU). Using RCU in advance gives you additional options, such as choosing tablespaces. RCU is available in directory /u01/Middleware/Weblogic12cHome/oracle_common/bin.

☒ Create new schemas

Schema prefix: OFSLL

Schema password:

Confirm schema password:

Database type: Oracle Database

Username: sys

Password:

Simple connect string: ofssl.in.oracle.com:1521:OLDB

☐ Use existing schemas

Help < Back Next > Finish Cancel

6. Select the option 'Create New Schema' and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.

7. Click 'Next'. The following window is displayed.

Oracle Business Intelligence 12c Configuration Assistant - Step 5 of 9

Port Range

Choose the port range for BI and WLS processes to use.

Port Range

Port Range Starting Port: 9500

Port Range End Port: 9999

Help < Back Next > Finish Cancel

8. Click 'Next'. The following window is displayed.

Oracle Business Intelligence 12c Configuration Assistant - Step 6 of 9

Initial Application

Choose the application that will be installed into your initial service instance. This can be the default sample application, an application archive exported from another BI installation or you can choose to start with a clean slate.

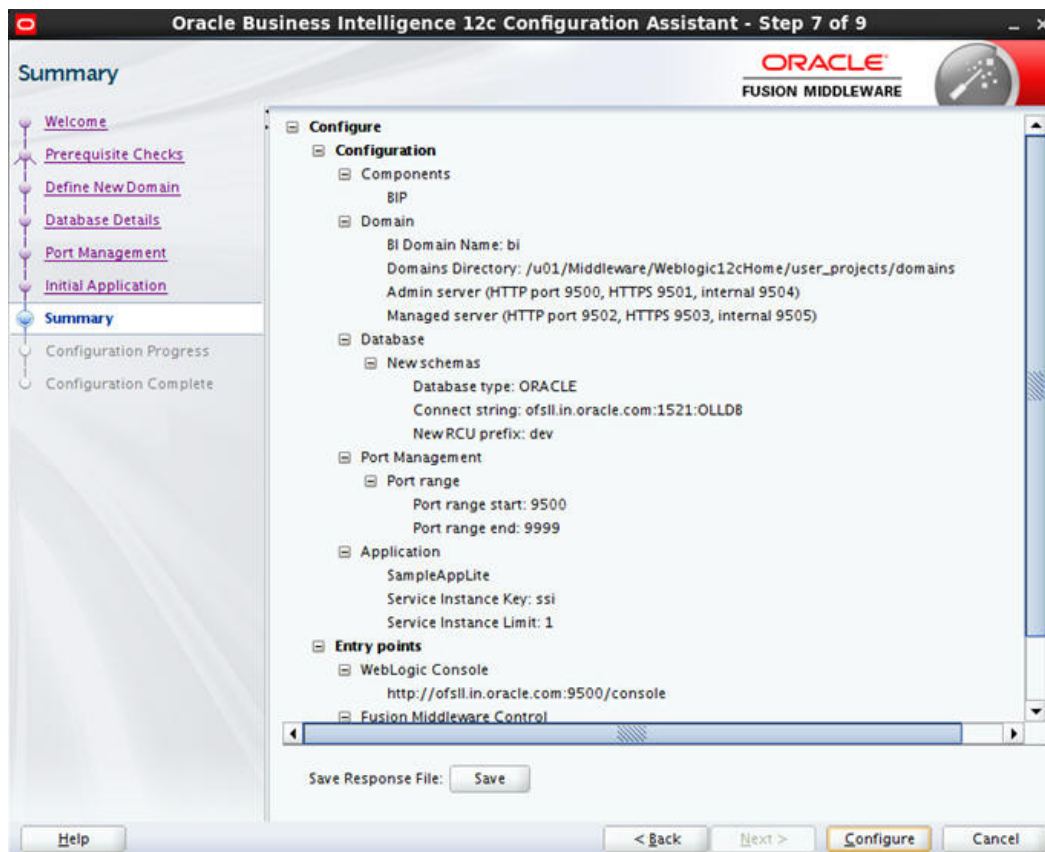
☒ Oracle sample application (SampleAppLite)

☐ Your own existing BI Application from export bundle (.jar file)

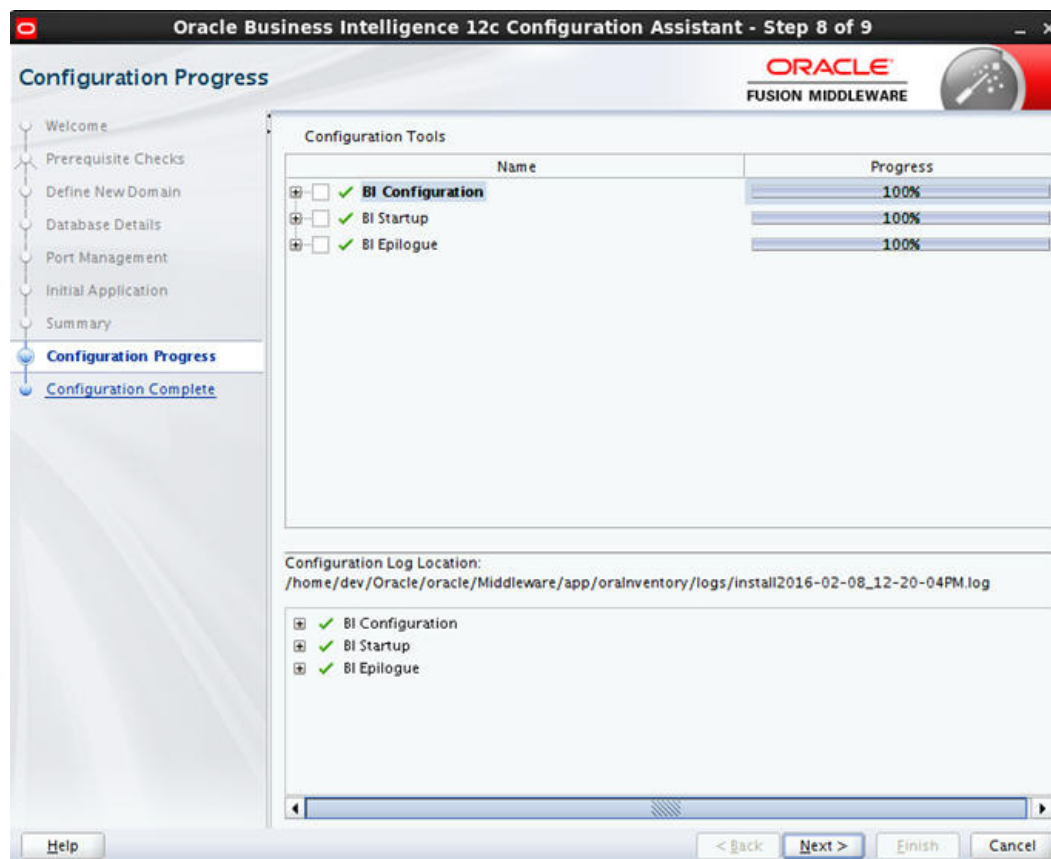
☐ Clean Slate (no predefined application)

Help < Back Next > Finish Cancel

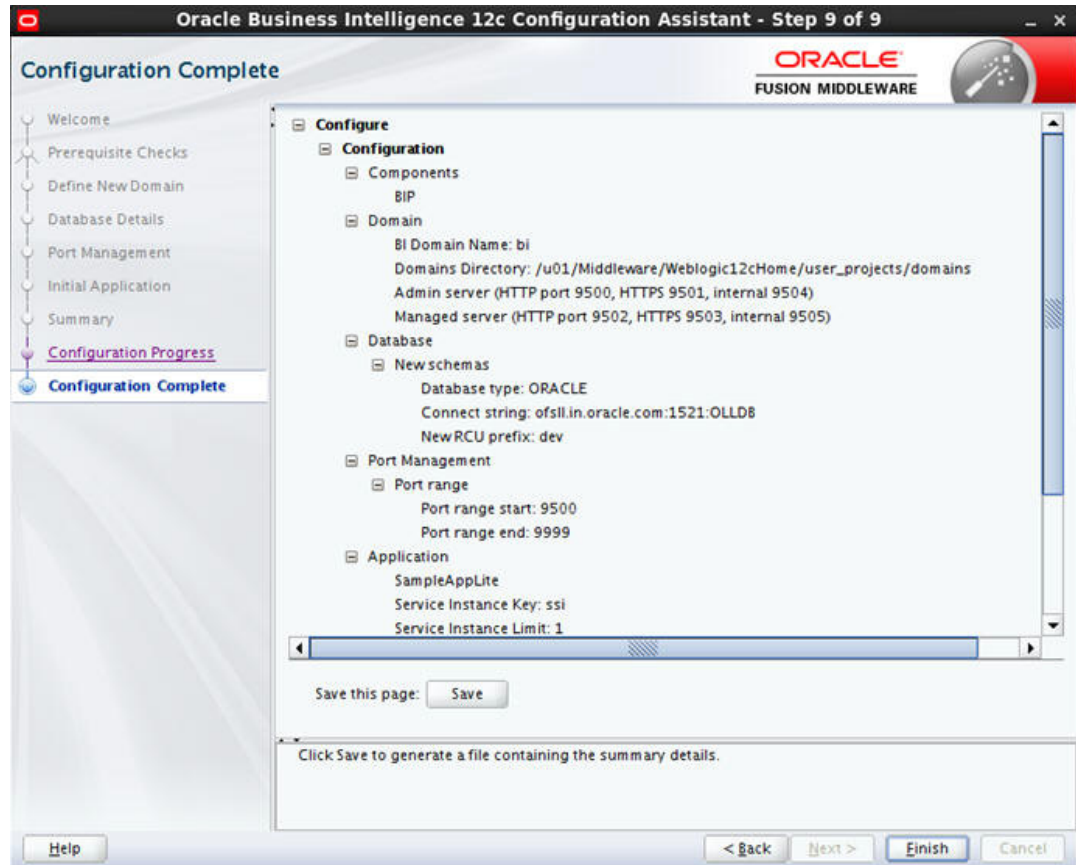
9. Click 'Next'. The following window is displayed.



10. Click 'Configure'. The following window is displayed.



11. Click 'Next'. The following window is displayed



12. Click 'Save' and save the Response File.

13. Click 'Finish'. The application will create a new domain for BI Publisher with the details as highlighted in the above screen.

3.1 Verifying Successful BIP Deployment

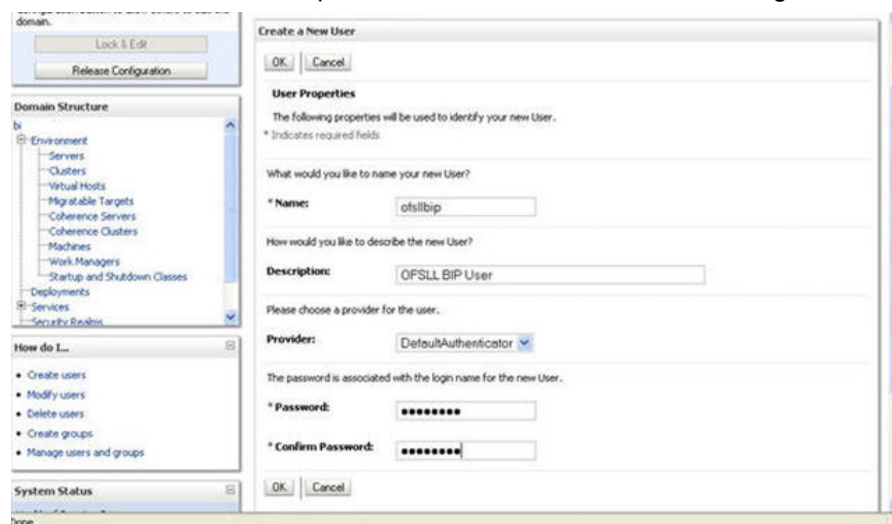
Successful BIP deployment can be verified by Launching the BIP URL <http://hostname:9502/xmlpserver>.

4. Creating Unique BI Publisher User

After configuring BI publisher, you must create a unique User ID.

To create User ID

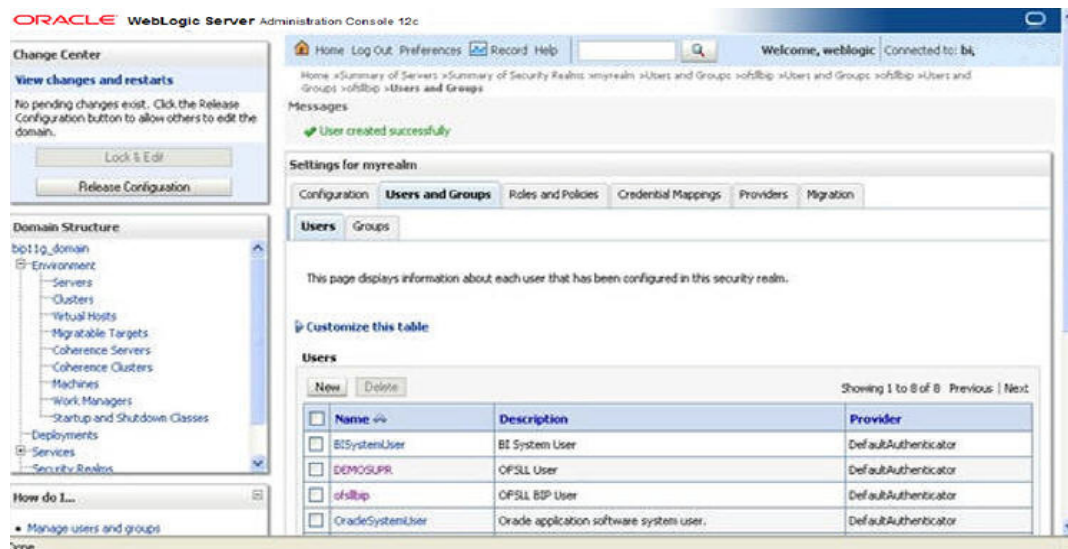
1. Login to BIP Domain (<http://hostname:port/console>).
2. Click 'Security Realms' and then select 'myrealm'.
3. Select Users and Groups > User and click 'New'. The following window is displayed.



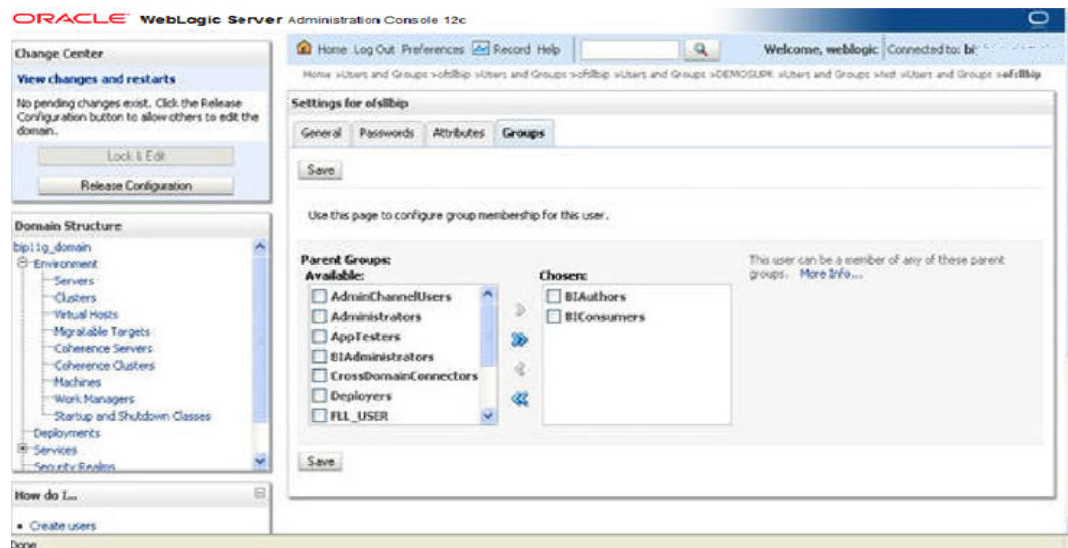
4. Specify the following details:

Field	Action
Name	Specify a valid name you need to maintain as User
Description	Provide description to the specified user
Provider	Select a provider for the user, from drop-down list.
Password	Specify a valid password you need to assign to the specified user.
Confirm Password	Retype the password to confirm it.

5. Click 'OK'. The following window is displays the new User ID created.



6. Select the check box adjacent to the 'User' created and click 'Groups' tab. The following window is displayed



7. Select the following Groups from the 'Parent Groups Available' list and click '>' to assign it to the new user. You can also assign other groups as required.

- BIAuthors
- BIConsumers

8. Click 'Save'. The User is mapped to the Group.

5. Creating BI Publisher Datasource

To create BI Publisher Datasource, do the following:

- Create Data Source with JNDI as 'jdbc/ofsllbipdb' on BI Publisher Domain
- Target the datasources to 'bi_server1'

1. Access the weblogic console URL using <http://hostname:port/console>.

The screenshot shows the Oracle WebLogic Server Administration Console. The left sidebar contains the 'Domain Structure' tree with 'Data Sources' selected. The main content area is titled 'Summary of JDBC Data Sources' and includes a 'Configuration' tab. Below the tab, there is a table of data sources. The table has columns for Name, Type, JNDI Name, and Targets. The data sources listed are 'bp_datasource', 'EPMSysRegistry', 'mds-ovsm', and 'OFSLLBIPDB'. The 'OFSLLBIPDB' data source is highlighted.

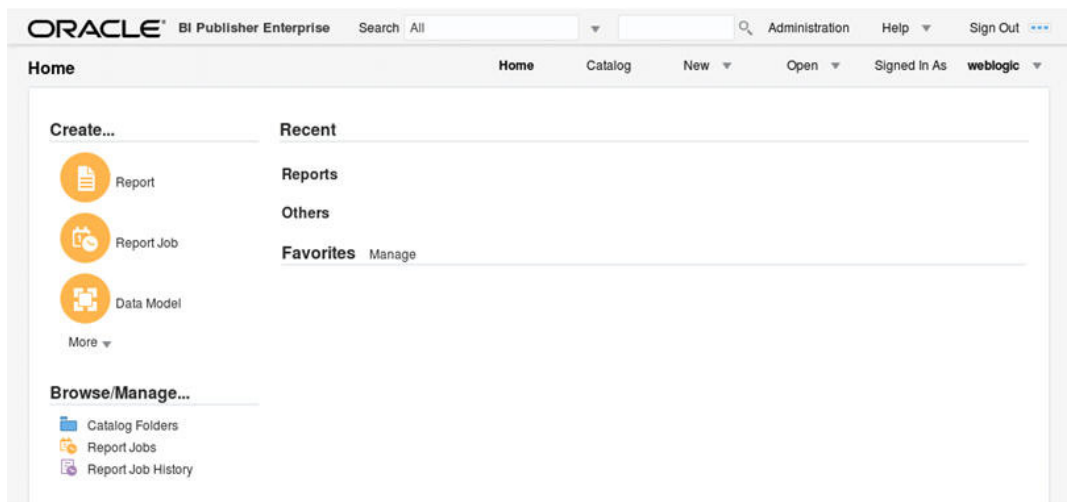
Name	Type	JNDI Name	Targets
bp_datasource	Generic	jdbc/bp_datasource	bi_cluster
EPMSysRegistry	Generic	jdbc/EPMSysRegistry	bi_cluster, AdminServer
mds-ovsm	Generic	jdbc/mds/ovsm	bi_cluster, AdminServer
OFSLLBIPDB	Generic	jdbc/ofsllbipdb	bi_server1

2. Launch <http://hostname:port/xmlpserver>. The following window is displayed.

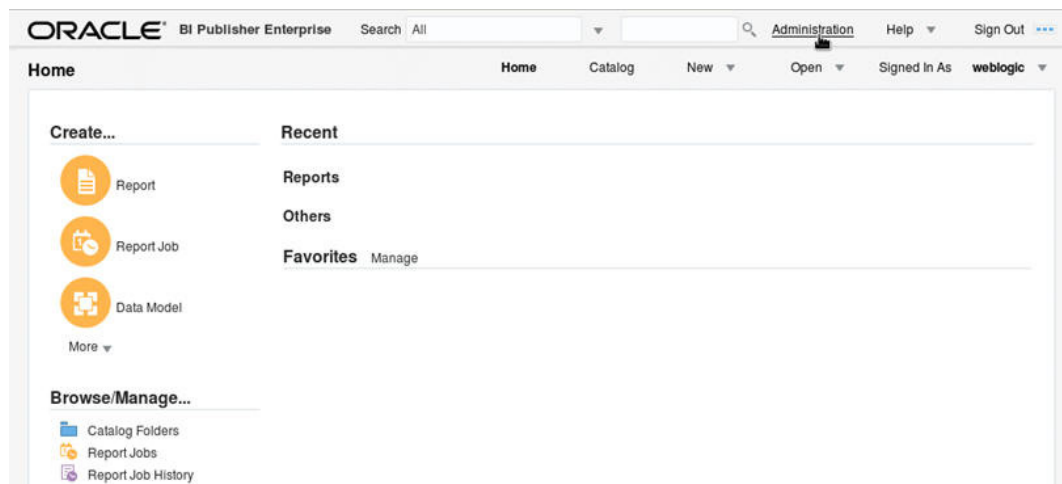
The screenshot shows the Oracle BI Publisher Enterprise Sign In window. It has a 'Sign In' heading and a prompt to enter username and password. There are input fields for 'Username' and 'Password'. Below these fields is an 'Accessibility Mode' checkbox and a 'Sign In' button. At the bottom, there is a language dropdown menu set to 'English (United States)'.

Oracle BI Publisher 12.2.1.0.0
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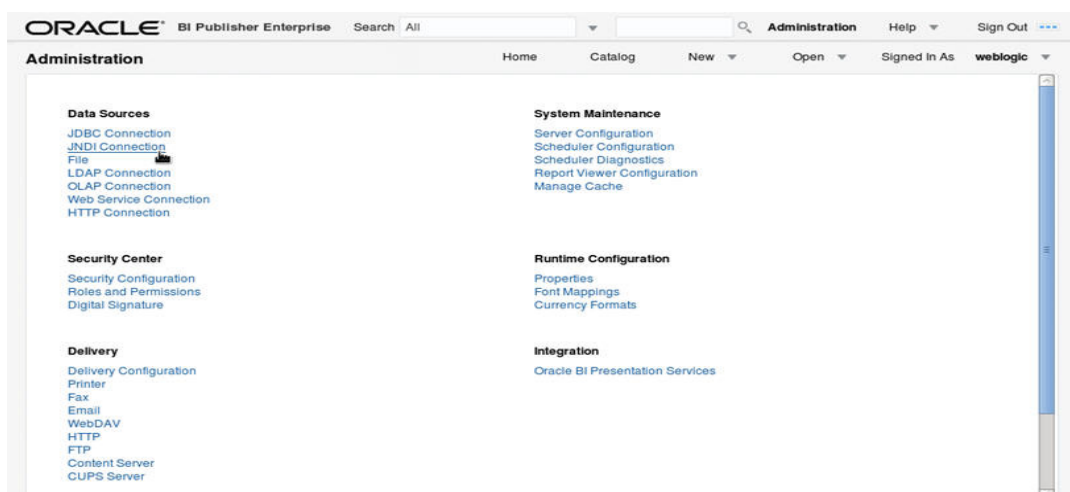
3. Login using the same credentials used for 'WebLogic administration' console login. The following window is displayed.



4. Click 'Administration' in the header section. The following window is displayed.



5. Click 'JNDI Connection'. The following window is displayed.



6. Add Data Source 'FLLReportsPool' with JNDI as 'jdbc/ofsllbipdb'.

- Under 'Security' section, select 'BI Author Role' and 'BI Consumer Role' from Available Roles and assign them as Allowed Roles.

Note

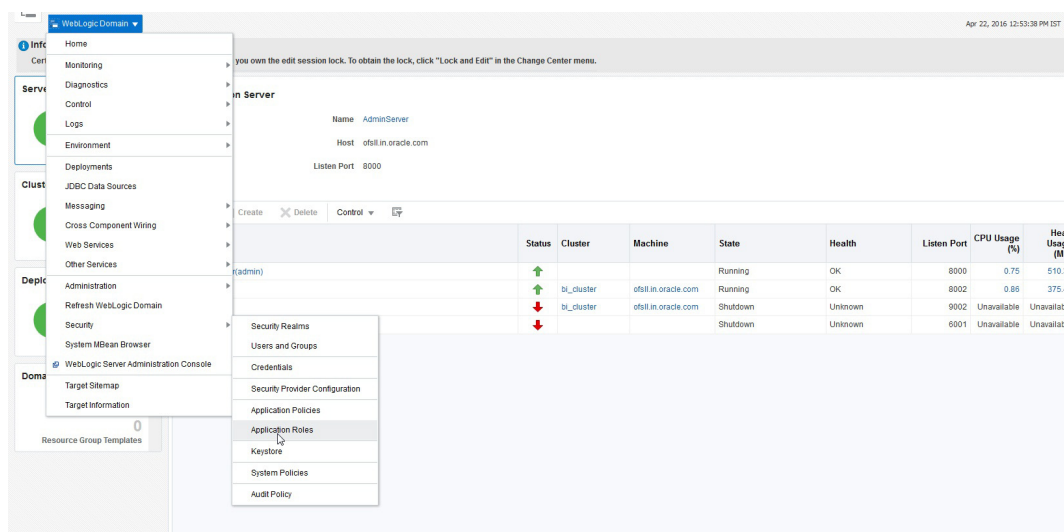
If "BI Author" and "BI Consumer" roles are not displayed in the 'Available Roles' section, you need to create the roles as explained in following 'Creating Roles' section.

5.1 Creating Roles

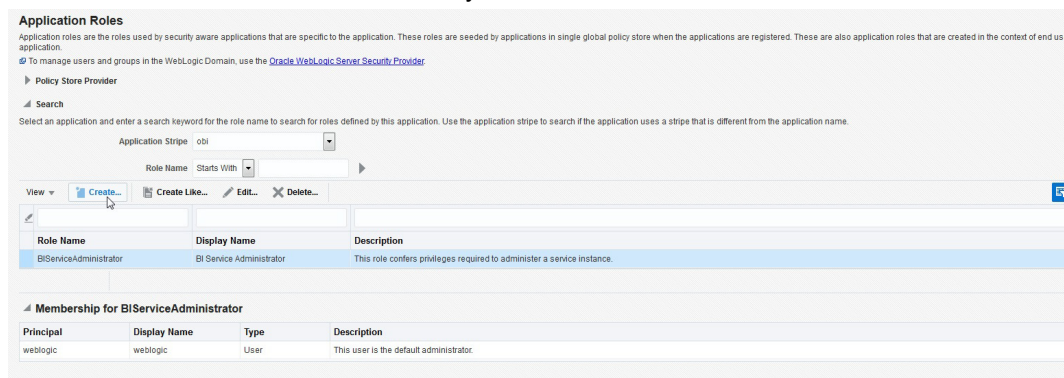
The following section details the steps to be followed to create "BI Author" and "BI Consumer" roles which are used to define security roles while creating Data Source on BI Publisher Domain.

To create WebLogic Application Role

- Login to Enterprise Manager using the URL - <http://hostname:port/em>.
- Select Weblogic Domain > Security > Application Roles as indicated in the following screen.



- In the Application Stripe field, select 'obi' from the drop-down list. The option 'BIServiceAdministrator' is added by default. Click 'Create'.



- Specify the following details:
 - Role Name
 - Display Name

— Description

Create Application Role OK Cancel

Role (or Enterprise Role) is the group of users designed at the enterprise level and typically used to assign a privilege or permission. A role can also contain other roles as members.

General

Application Stripe: obi

* Role Name: BIConsumer

Display Name: BIConsumer

Description: The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.

Members

An application role may need to be mapped to users or groups defined in enterprise LDAP server, or the role can be mapped to other application roles.

View + + Add ✕ Delete... 🔗 Detach

Name	Display Name	Type
No groups or application roles added.		

- Click 'Add' to add the application role to the members family. The same can later be mapped to required Users or Groups defined in Enterprise LDAP server, or the role can be mapped to other application roles.

Create Application Role OK Cancel

Role (or Enterprise Role) is the group of users designed at the enterprise level and typically used to assign a privilege or permission. A role can also contain other roles as members.

Add Principal

Specify criteria to search and select the application roles that you want to grant permissions to:

Search

Type: User

Principal Name: Starts With

Display Name: Starts With

Searched Principals

View + + Detach

Principal	Display Name	Description
LCMUser		This is the default service account for WebLogic Server Lifecycle Manager configuration updates.
OracleSystemUser		Oracle application software system user.
weblogic		This user is the default administrator.

Advanced Option

☐ Check to enter principal name here instead of searching from above. This option can be used for advanced scenarios related to custom authenticators.

OK Cancel

- Add the Weblogic User by selecting "weblogic" in the 'Searched Principals' section and click 'OK'. The Weblogic User is added to the application role.

Create Application Role OK Cancel

Role (or Enterprise Role) is the group of users designed at the enterprise level and typically used to assign a privilege or permission. A role can also contain other roles as members.

General

Application Stripe: obi

* Role Name: BIConsumer

Display Name: BIConsumer

Description: The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.

Members

An application role may need to be mapped to users or groups defined in enterprise LDAP server, or the role can be mapped to other application roles.

View + + Add ✕ Delete... 🔗 Detach

Name	Display Name	Type
weblogic		User

- Click 'OK'. The new role is added to the list of application roles.

Application Roles

Application roles are the roles used by security aware applications that are specific to the application. These roles are seeded by applications in single global policy store when the applications are registered. These are also application roles that are created in the context of end users accessing the application.

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

Policy Store Provider

Search

Select an application and enter a search keyword for the role name to search for roles defined by this application. Use the application stripe to search if the application uses a stripe that is different from the application name.

Application Stripe: obi

Role Name: Starts With

View + + Create... + Create Like... ✎ Edit... ✕ Delete... 🔗 Detach

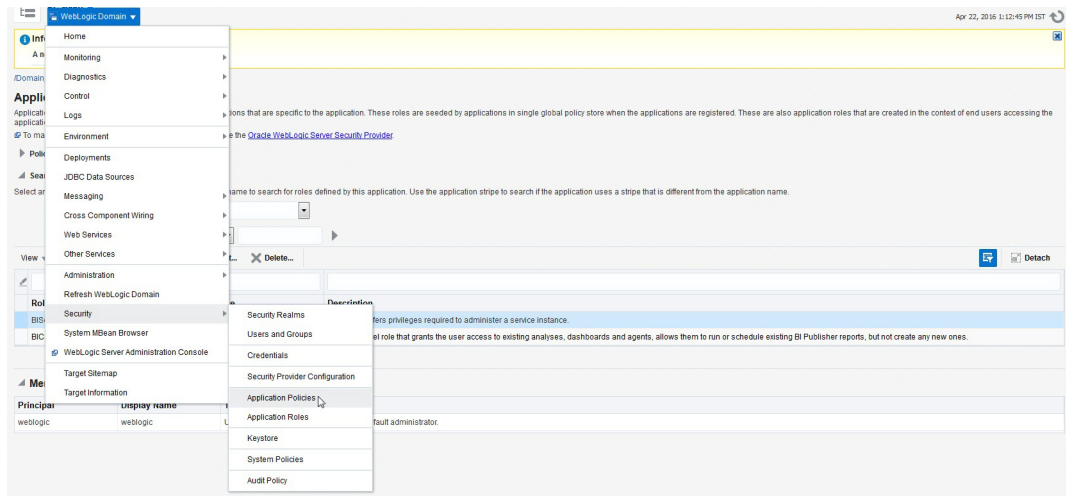
Role Name	Display Name	Description
BIServiceAdministrator	BI Service Administrator	This role confers privileges required to administer a service instance.
BIConsumer	BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.

Membership for BIServiceAdministrator

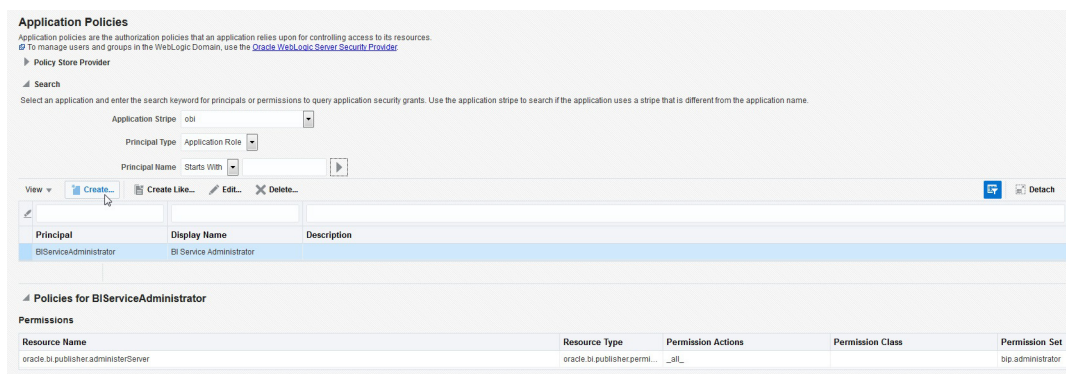
Principal	Display Name	Type	Description
weblogic	weblogic	User	This user is the default administrator.

To Create WebLogic Application Policies

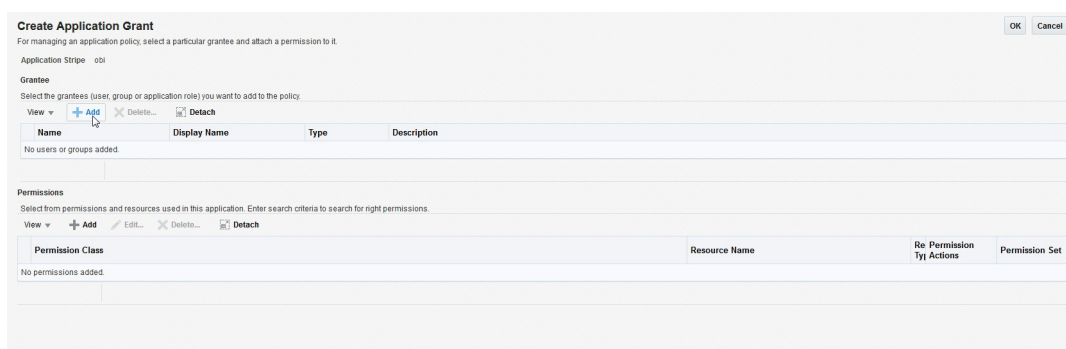
1. Login to Enterprise Manager using the URL - <http://hostname:port/em>.
2. Select Weblogic Domain > Security > Application Policies as indicated in the following screen:



3. In the Application Stripe field, select 'obi' from the drop-down list. Click 'Create'.



4. In 'Create Application Grant' screen, under the Grantee section, click 'Add'.



5. Select the newly created application role from the list and click 'OK'. The new role is added to the list.

Create Application Grant
For managing an application policy, select a particular grantee and attach a permission to it.

Application Stripe obi

Grantee
Select the grantees (user, group or application role) you want to add to the policy.

View ▾ + Add ✕ Delete... 📄 Detach

Name	Display Name
No users or groups added.	

Permissions
Select from permissions and resources used in this application.

View ▾ + Add ✕ Edit... ✕ Delete... 📄 Detach

Permission Class
No permissions added.

Add Principal
Specify criteria to search and select the application roles that you want to grant permissions to.

Search

Type Application Role ▾

Principal Name Starts With ▾

Display Name Starts With ▾ ▶

Searched Principals

View ▾ 📄 Detach

Principal	Display Name	Description
anonymous-role	Anonymous Role	
authenticated-role	Authenticated Role	
BIConsumer	BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.
BIServiceAdministrator	BI Service Administrator	This role confers privileges required to administer a service instance.

OK Cancel

6. In the 'Permissions' section, click 'Add'.

Create Application Grant
For managing an application policy, select a particular grantee and attach a permission to it.

Application Stripe obi

Grantee
Select the grantees (user, group or application role) you want to add to the policy.

View ▾ + Add ✕ Delete... 📄 Detach

Name	Display Name	Type	Description
BIConsumer	BIConsumer	Application Role	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.

Permissions
Select from permissions and resources used in this application. Enter search criteria to search for right permissions.

View ▾ + Add ✕ Edit... ✕ Delete... 📄 Detach

Permission Class	Resource Name	Re Permission Ty Actions	Permission Set
No permissions added.			

7. In the search criteria, select 'Resource Type' and select the resource type from the drop-down list. Select the required resource from the search results and click 'Continue'.

Create Application Grant
For managing an application policy, select a particular grantee and attach a permission to it.

Application Stripe obi

Grantee
Select the grantees (user, group or application role) you want to add to the policy.

View ▾ + Add ✕ Delete... 📄 Detach

Name	Display Name	Type
BIConsumer	BIConsumer	Applic

Permissions
Select from permissions and resources used in this application. Enter search criteria to search for right permissions.

View ▾ + Add ✕ Edit... ✕ Delete... 📄 Detach

Permission Class
No permissions added.

Add Permission
Select from permissions and resources used in this application. Enter search criteria to search for right permissions.

Search

Permissions Resource Types

Resource Type oracle.bi.publisher.permission ▾

Resource Name Starts With ▾ ▶

Search Results

Resource Name	Display Name	Description
oracle.bi.publisher.accessExcelRepo...	BIP Access Excel Report Analyzer	
oracle.bi.publisher.accessOnlineRep...	BIP Access Online Report Analyzer	
oracle.bi.publisher.accessReportOut...	BIP Access Report Output	
oracle.bi.publisher.administerServer	BIP Administer Server	
oracle.bi.publisher.developDataModel	BIP Develop Data Model	
oracle.bi.publisher.developReport	BIP Develop Report	
oracle.bi.publisher.runReportOnline	BIP Run Report Online	
oracle.bi.publisher.scheduleReport	BIP Schedule Report	

Tip Continue to go to next step if you want to enter policy details.

Continue Cancel

8. Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click 'Select'.

The 'Create Application Grant' dialog box is shown with the 'Add Permission' sub-dialog open. The 'Add Permission' dialog has a 'Customize' tab selected. It shows the following fields:

- Permission Class: oracle security.jps ResourcePermission
- Resource Type: oracle bi.publisher.permission
- Resource Name: (empty)
- Permission Actions: ☒ All

At the bottom of the 'Add Permission' dialog are buttons for 'Back', 'Select', and 'Cancel'. The 'Select' button is highlighted.

9. The selected permissions are defined to the application role. Similarly you can define the required permissions for other application roles.

The 'Create Application Grant' dialog box is shown with the 'Permissions' section expanded. It displays a table of permissions:

Permission Class	Resource Name	Re Permission Ty Actions	Permission Set
oracle security.jps ResourcePermission	oracle bi.publisher.accessOnlineReportAnalyzer	ora_all	
oracle security.jps ResourcePermission	oracle bi.publisher.runReportOnline	ora_all	
oracle security.jps ResourcePermission	oracle bi.publisher.accessExcelReportAnalyzer	ora_all	

10. Once done, click 'OK'.

The 'Application Policies' page is shown. It displays a table of policies for the 'BICConsumer' application role:

Principal	Display Name	Description
BICConsumer	BICConsumer	
BIServiceAdministrator	BI Service Administrator	

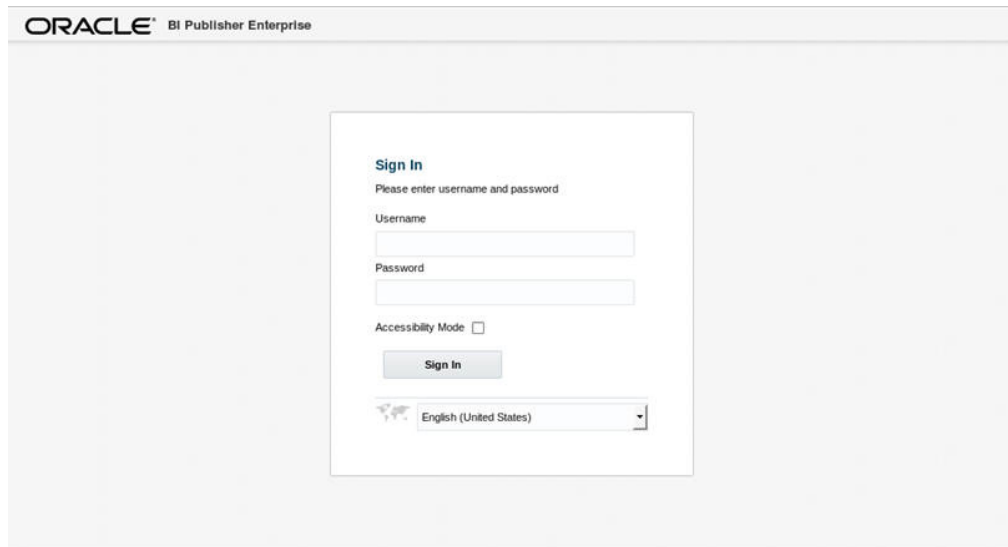
Below the table, the 'Policies for BICConsumer' section is expanded, showing a table of permissions:

Resource Name	Resource Type	Permission Actions	Permission Class	Permission Set
oracle bi.publisher.runReportOnline	oracle bi.publisher.permi...	_all	oracle security.jps ResourcePermission	
oracle bi.publisher.accessOnlineReportAnalyzer	oracle bi.publisher.permi...	_all	oracle security.jps ResourcePermission	
oracle bi.publisher.accessExcelReportAnalyzer	oracle bi.publisher.permi...	_all	oracle security.jps ResourcePermission	

6. Importing Reports to BI Publisher Server

To import reports to BI Publisher Server, do the following:

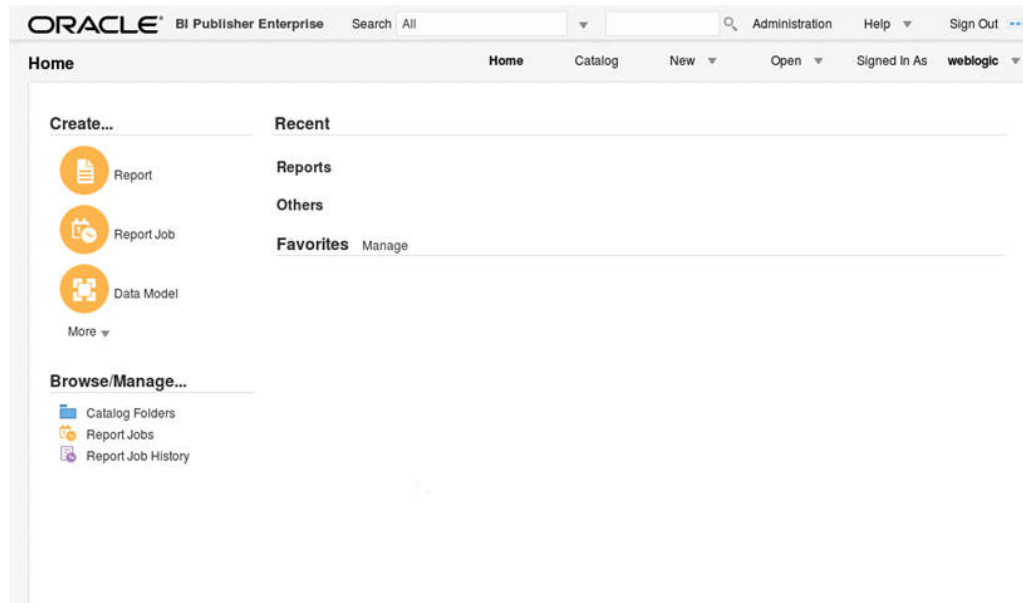
1. Copy and extract the OFSLLReports.zip file to local area. Assume you have extracted to /home/oracle/app/OFSLLReports, then the zip file “oracle.xdrz” is extracted to /home/oracle/app/OFSLLReports
2. Launch the Oracle Business Intelligence Publisher Application using http://hostname:port/xmlpserver
3. Login with valid credentials.



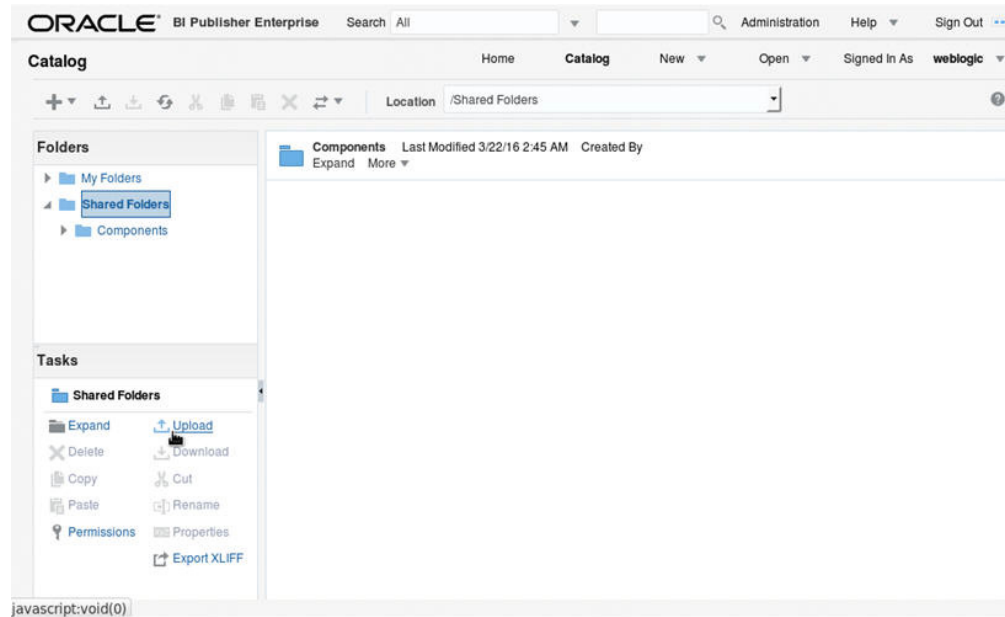
The screenshot shows the Oracle BI Publisher Enterprise Sign In page. The page has a header with the Oracle logo and "BI Publisher Enterprise". The main content area contains a "Sign In" form with the following elements:

- Sign In** (Section Header)
- Please enter username and password
- Username (Text input field)
- Password (Text input field)
- Accessibility Mode ☐
- Sign In** (Button)
- Language dropdown menu (Currently set to English (United States))

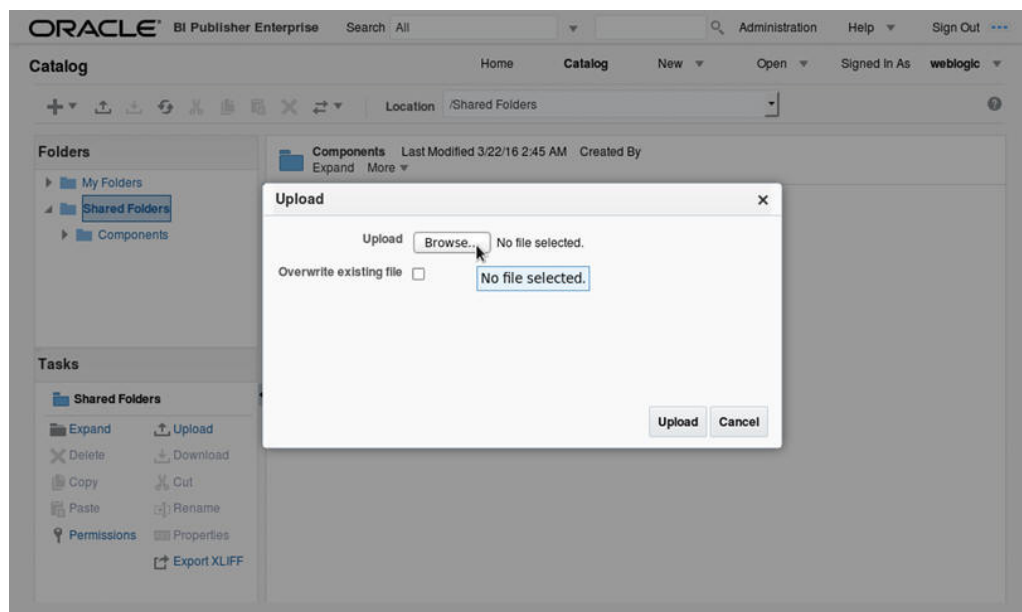
4. Following window is displayed. Click on 'Catalog Folders' on the left pane.



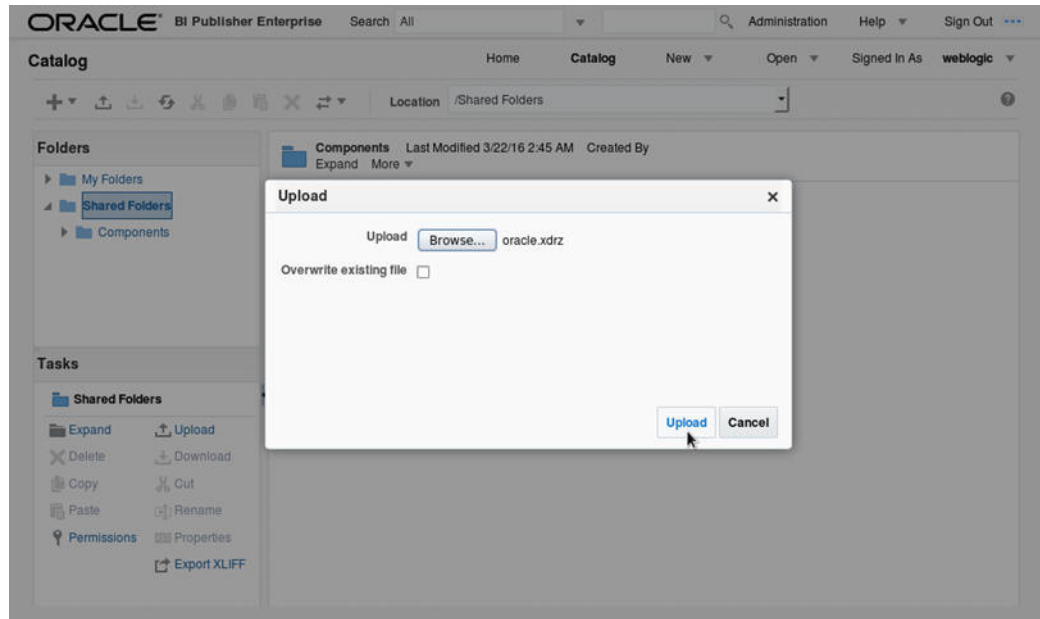
5. Click on 'Shared Folders' option and then click 'Upload'.



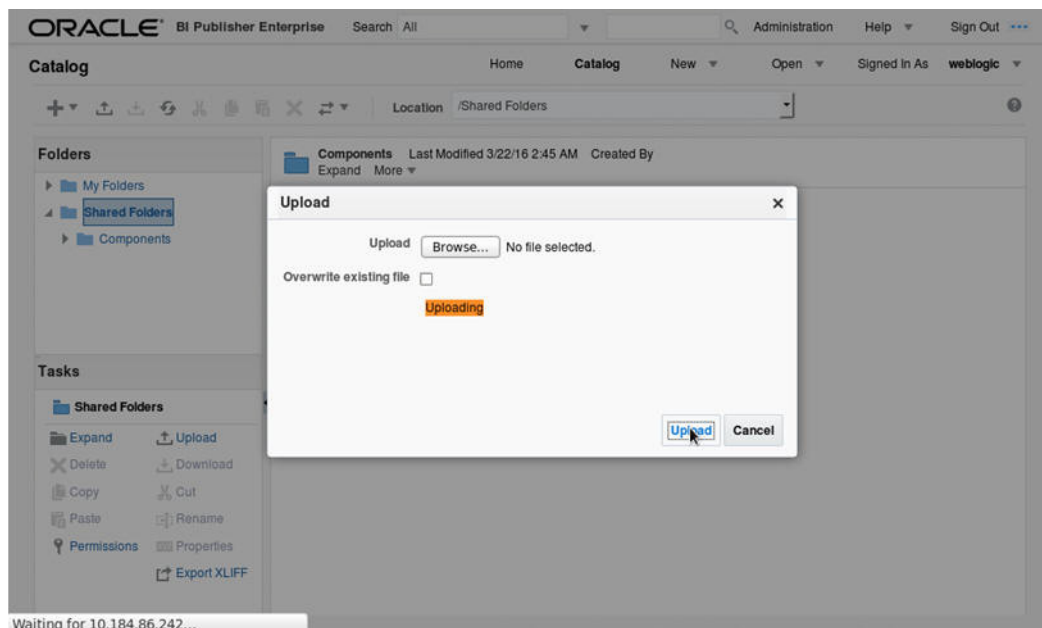
6. The following window is displayed. Browse to the location where the oracle.xdrz file is saved. Click the 'Overwrite Existing File' check box if you are overwriting an existing directory.



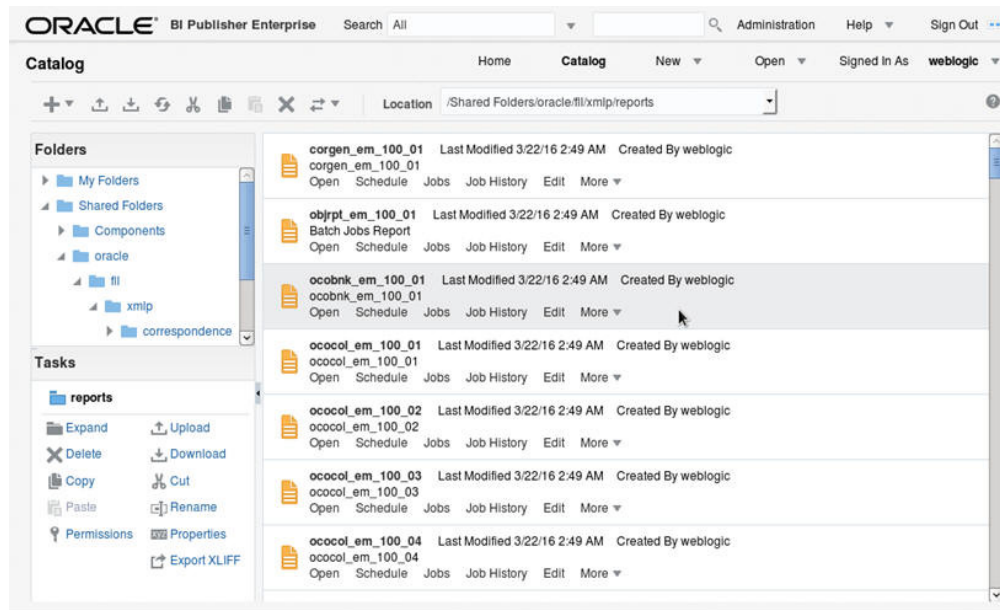
7. Click on 'Upload'.



8. The following window is displayed.



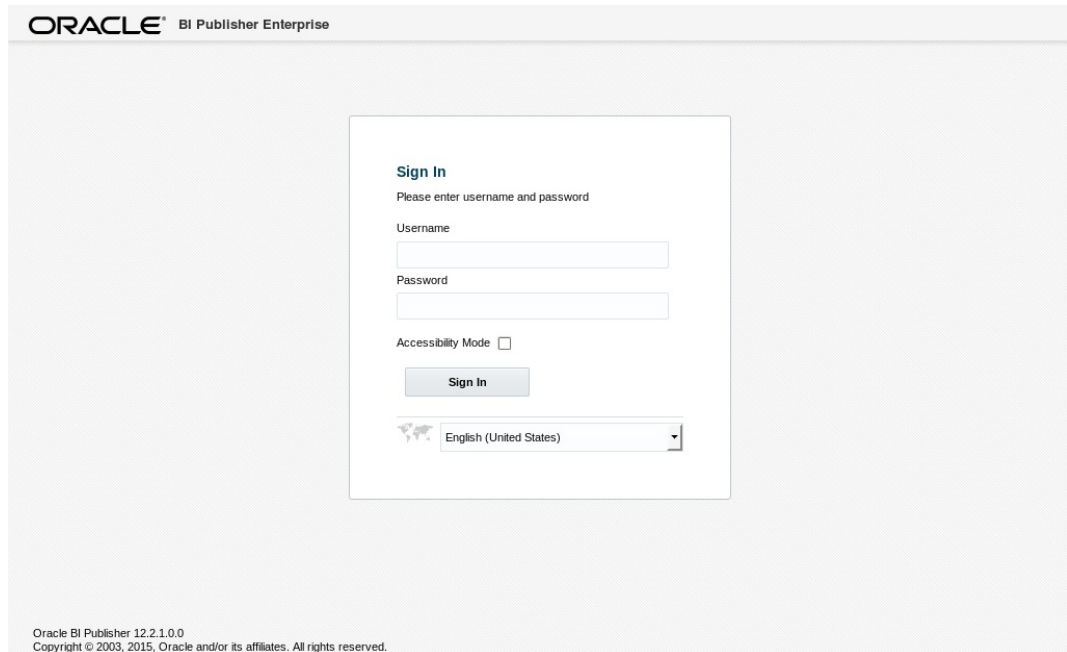
9. Once the upload is completed, click any folder to see the list of reports under the directory. The following window is displayed.



7. Configure MDB Mail Server

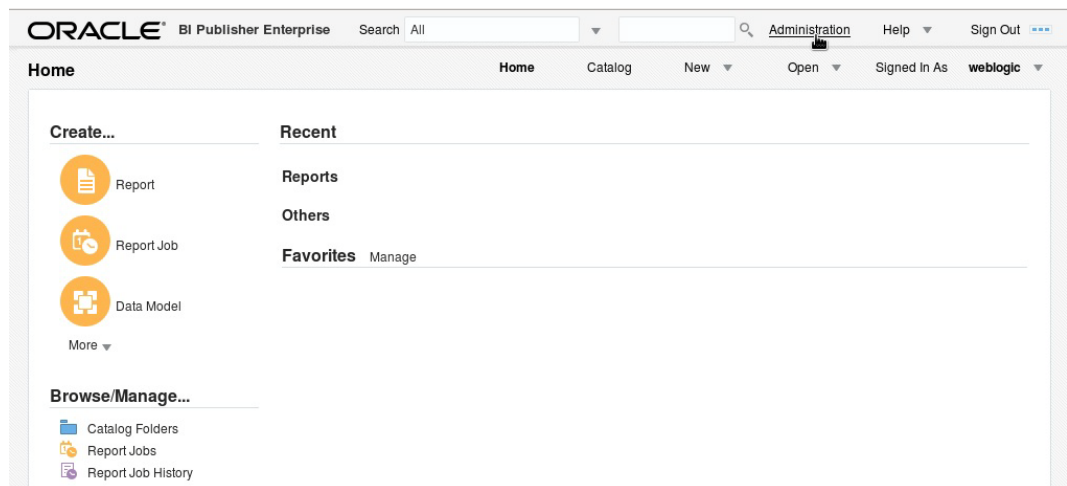
Refer to the following instructions to configure the MDB email server.

1. Launch the Oracle Business Intelligence (BI) Publisher application (<http://hostname:port/xmlpserver>). The following window is displayed.



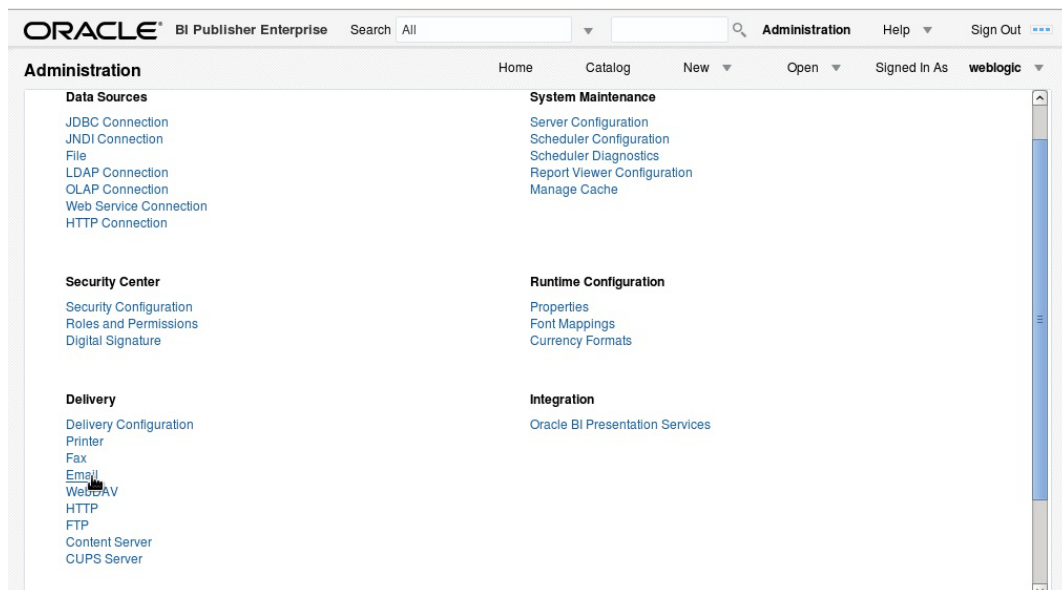
The image shows the Oracle BI Publisher Enterprise Sign In window. At the top, it says "ORACLE® BI Publisher Enterprise". Below this is a "Sign In" section with the text "Please enter username and password". There are two input fields: "Username" and "Password". Below these is an "Accessibility Mode" checkbox, which is unchecked. There is a "Sign In" button. At the bottom, there is a language dropdown menu showing "English (United States)". At the very bottom, there is a small copyright notice: "Oracle BI Publisher 12.2.1.0.0 Copyright © 2003, 2015, Oracle and/or its affiliates. All rights reserved."

2. Login using the valid credentials. The following window is displayed.

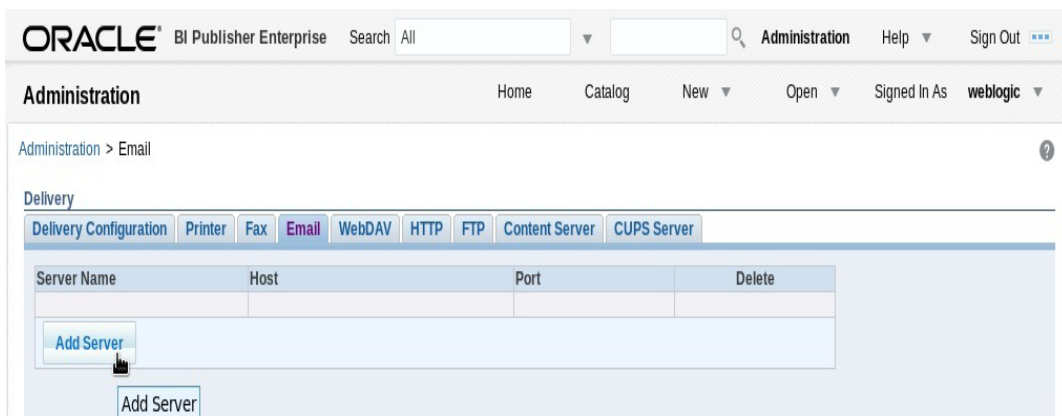


The image shows the Oracle BI Publisher Enterprise Home window after a successful login. The top navigation bar includes "ORACLE® BI Publisher Enterprise", a search bar, and links for "Administration", "Help", and "Sign Out". Below this is a "Home" section with tabs for "Home", "Catalog", "New", "Open", "Signed In As", and "weblogic". The main content area is divided into two columns. The left column has a "Create..." section with icons for "Report", "Report Job", and "Data Model", and a "Browse/Manage..." section with links for "Catalog Folders", "Report Jobs", and "Report Job History". The right column has a "Recent" section with "Reports" and "Others", and a "Favorites" section with a "Manage" link.

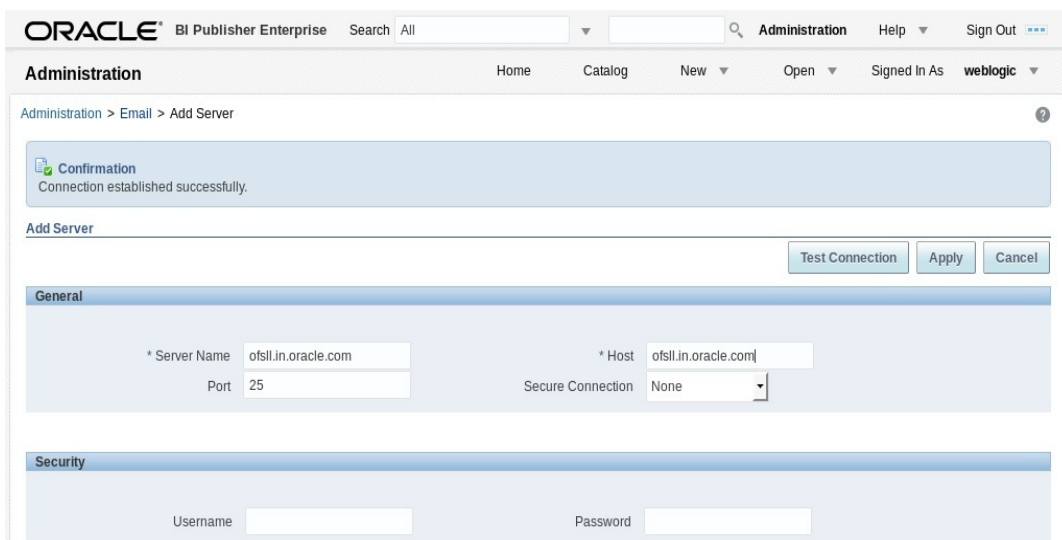
3. Click 'Administration'. The following window is displayed.



4. Click 'Email'. The following window is displayed.



5. Click 'Add Server'. The following window is displayed.



6. Specify the Server details (server name, host, and port number) and click 'Test Connection'. On completion, a confirmation message is displayed as indicated.

7. Click 'Apply'. The following window is displayed.

The screenshot shows the Oracle BI Publisher Enterprise Administration console. The breadcrumb trail is 'Administration > Email > Add Server'. The 'Add Server' dialog box is open, showing the 'General' tab. The 'Server Name' is 'ofsl.in.oracle.com', the 'Host' is 'ofsl.in.oracle.com', and the 'Port' is '25'. The 'Secure Connection' is set to 'None'. There are 'Test Connection', 'Apply', and 'Cancel' buttons. Below the 'General' tab is the 'Security' tab, which is currently empty.

ORACLE® BI Publisher Enterprise Search All Administration Help Sign Out

Administration Home Catalog New Open Signed In As weblogic

Administration > Email > Add Server

Add Server

Test Connection Apply Cancel

General

* Server Name ofsl.in.oracle.com * Host ofsl.in.oracle.com

Port 25 Secure Connection None

Security

Username Password

8. The MDB email server is successfully added as indicated.

The screenshot shows the Oracle BI Publisher Enterprise Administration console. The breadcrumb trail is 'Administration > Email'. The 'Delivery' configuration page is open, showing the 'Email' tab. The 'Server Name' is 'ofsl.in.oracle.com', the 'Host' is 'ofsl.in.oracle.com', and the 'Port' is '25'. There is a 'Delete' button. Below the table is an 'Add Server' button.

ORACLE® BI Publisher Enterprise Search All Administration Help Sign Out

Administration Home Catalog New Open Signed In As weblogic

Administration > Email

Delivery

Delivery Configuration Printer Fax Email WebDAV HTTP FTP Content Server CUPS Server

Server Name	Host	Port	Delete
ofsl.in.oracle.com	ofsl.in.oracle.com	25	

Add Server