

BIP Installation Guide

# **Oracle Financial Services Lending and Leasing**

Release 14.3.1.0.0

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BIP Installation Guide  
March 2017  
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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 consists of the following steps.

- [Installing BI Publisher](#)
- [Configuring BI Publisher](#)
- [Creating Unique BI Publisher User](#)
- [Creating BI Publisher Datasource](#)
- [Importing Reports to BI Publisher Server](#)
- [Configure MDB Mail Server](#)

## 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>

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### Note

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

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## 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

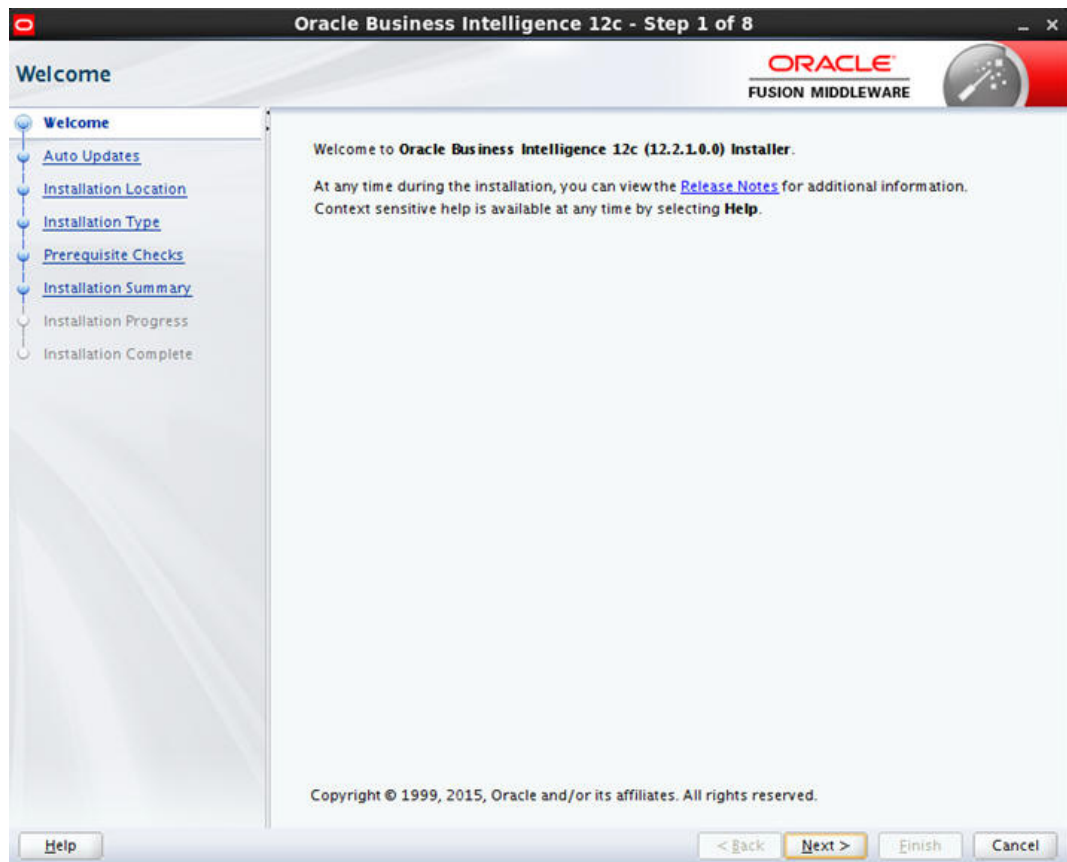
Term	Refers to
Home Directory/ \$OFSSL_HOME	Oracle Financial Services Lending and Leasing Home Directory

## 2. Installing BI Publisher

### 2.1 Installing BI Publisher

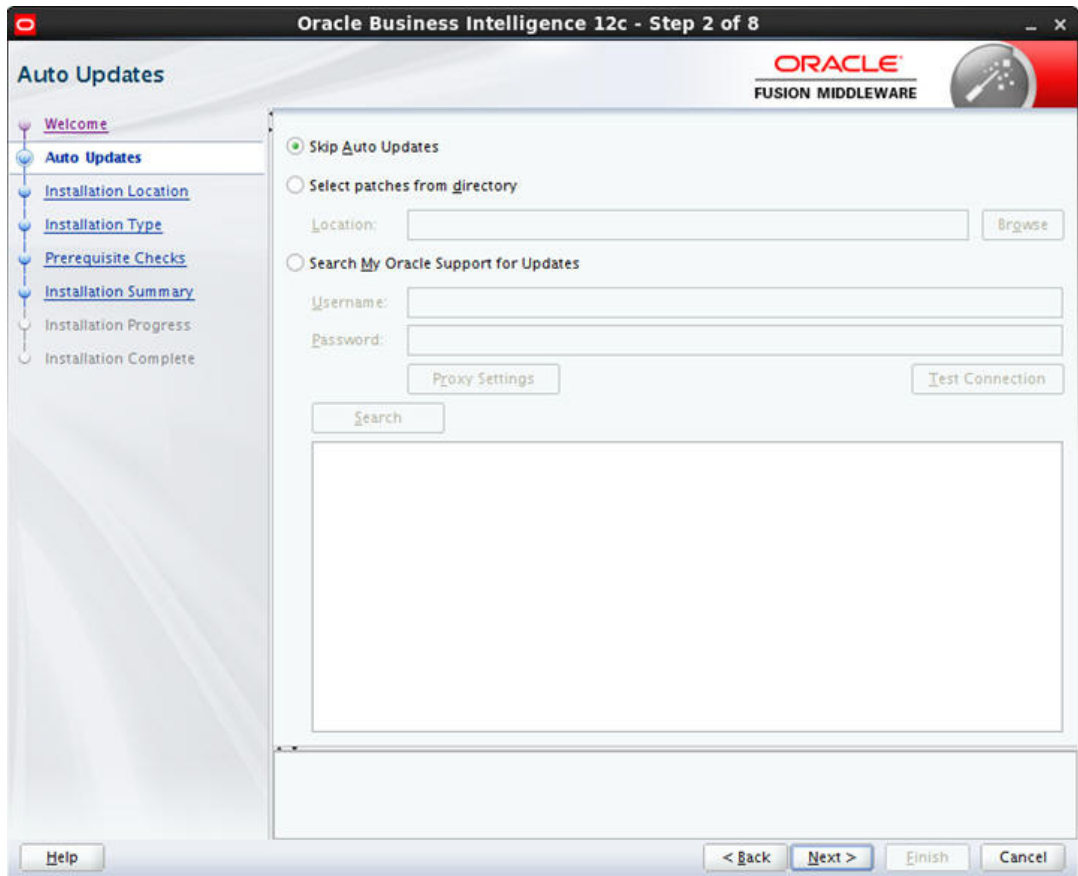
Follow the below steps to install BI publisher:

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.

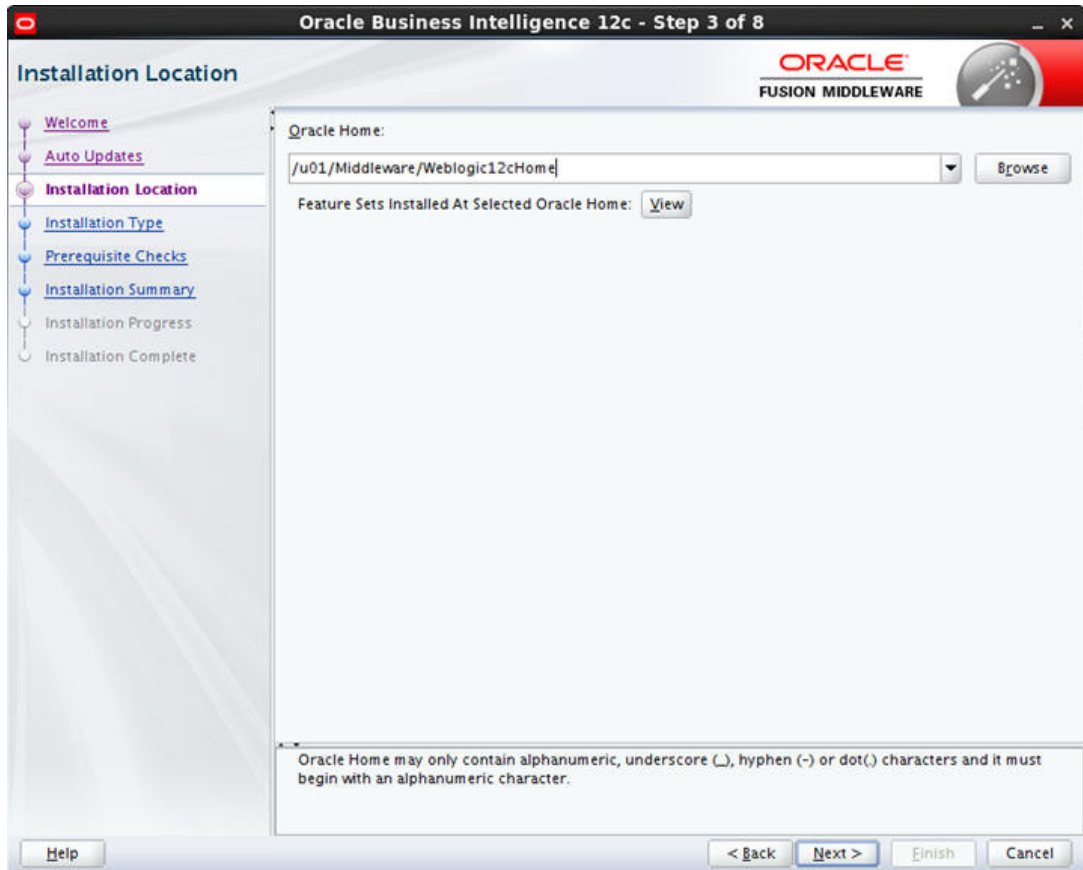


5. Click 'Next'. The following window is displayed.

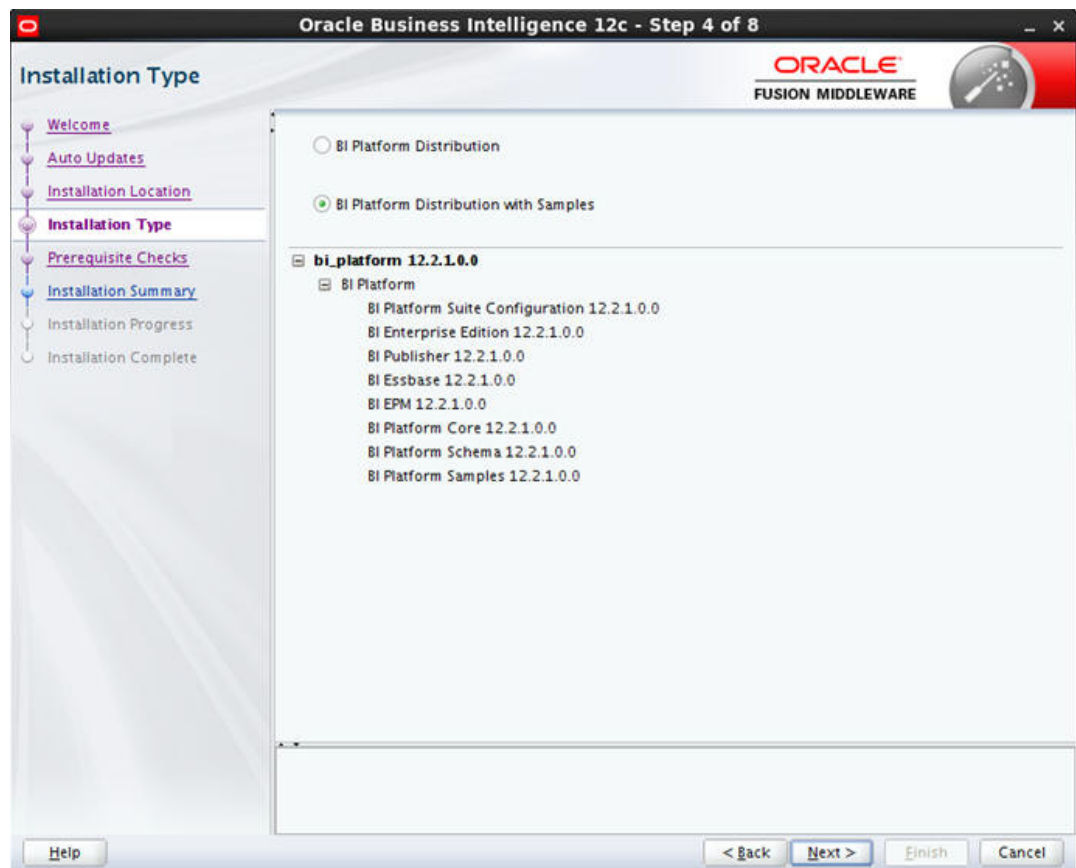
6. Select the option 'Skip Software Updates' and click 'Next'. The following window is displayed.



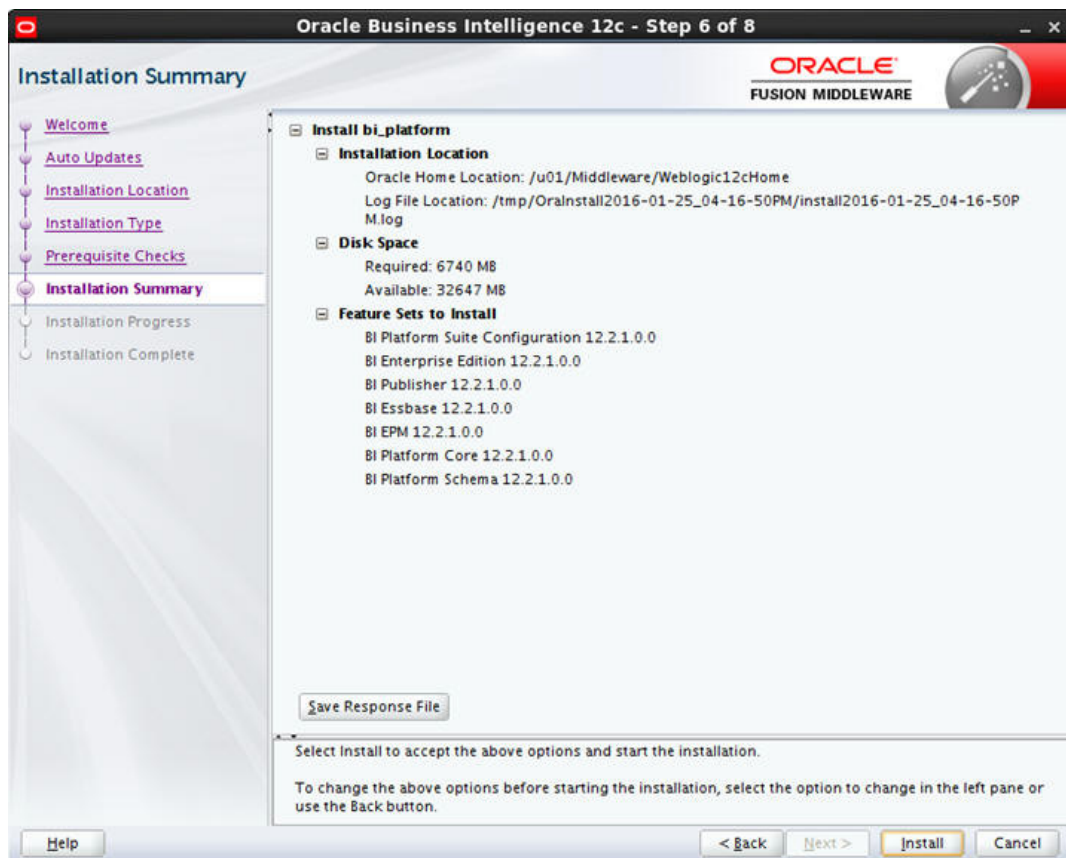
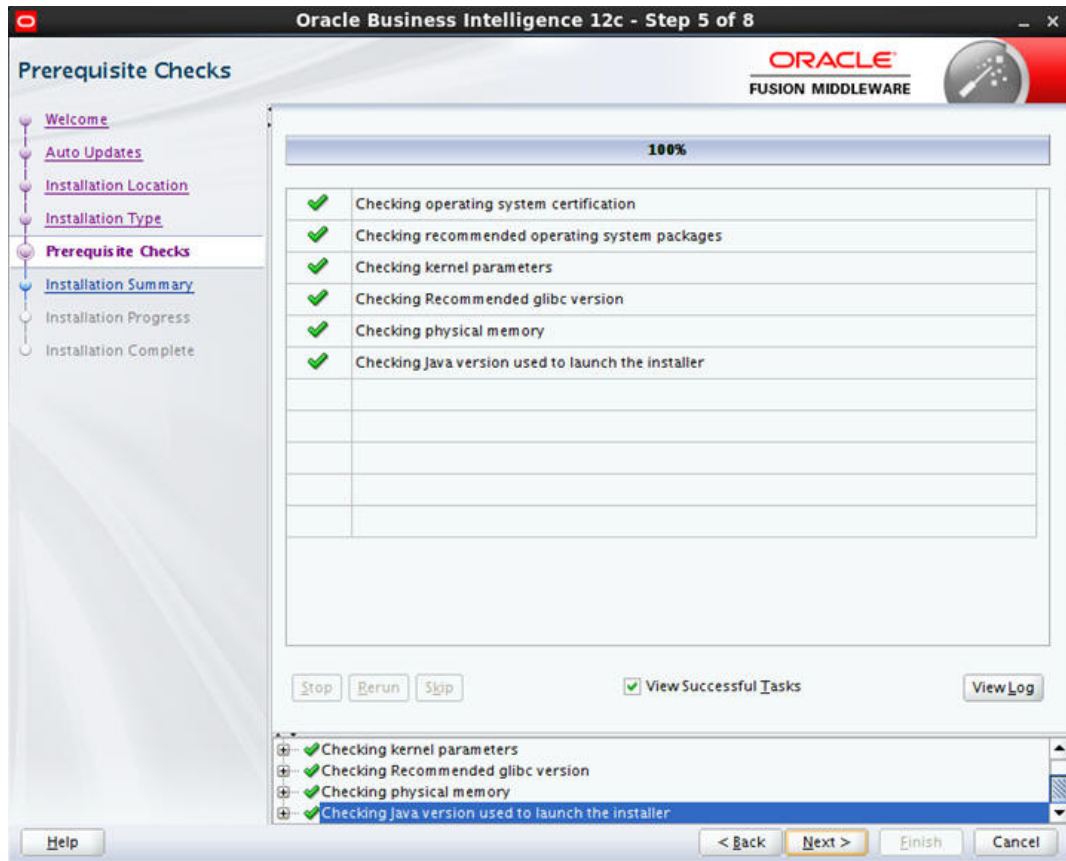
7. Browse Oracle Middleware Home path as /u01/Middleware/Weblogic12cHome.



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



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

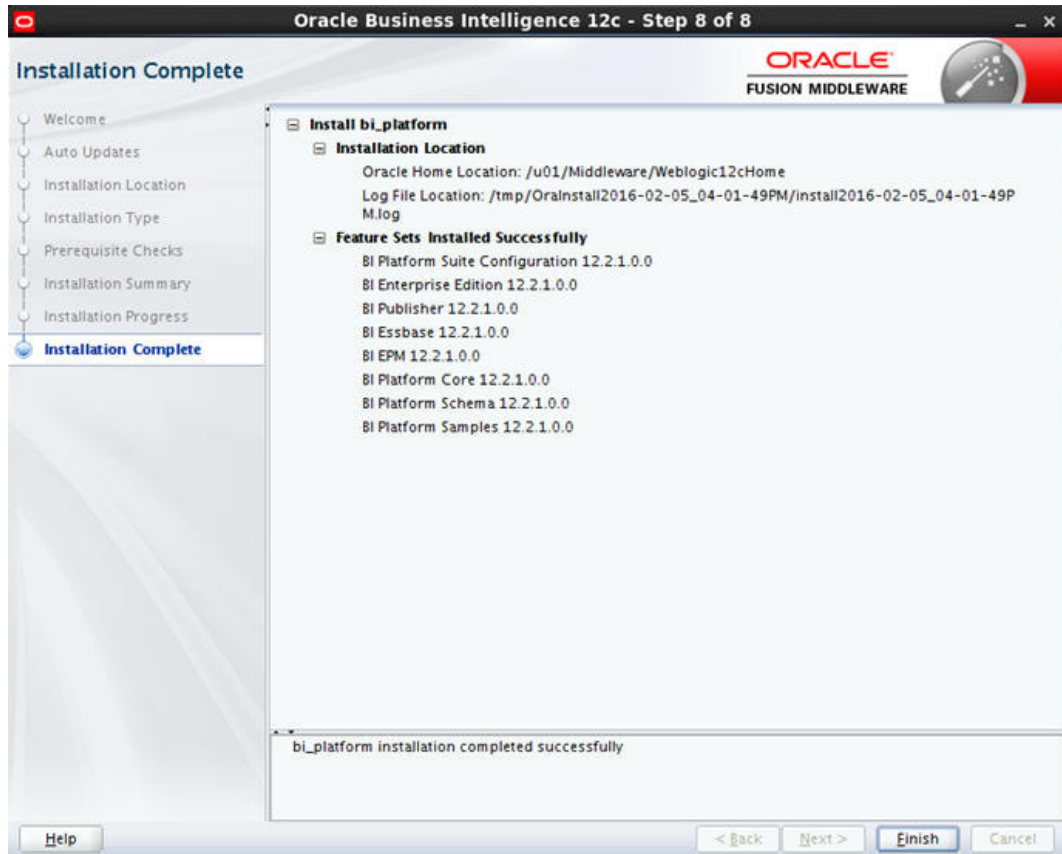




10. Click 'Install'. The following window is displayed.



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

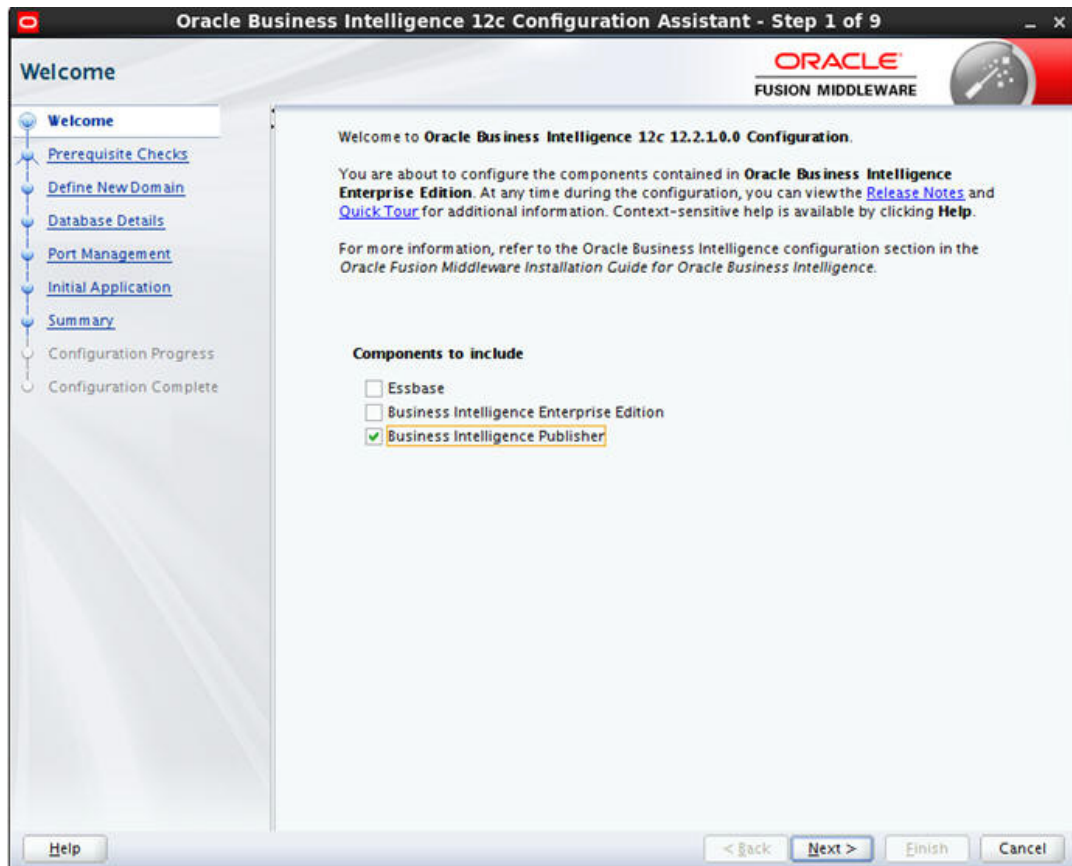


## 3. Configuring BI Publisher

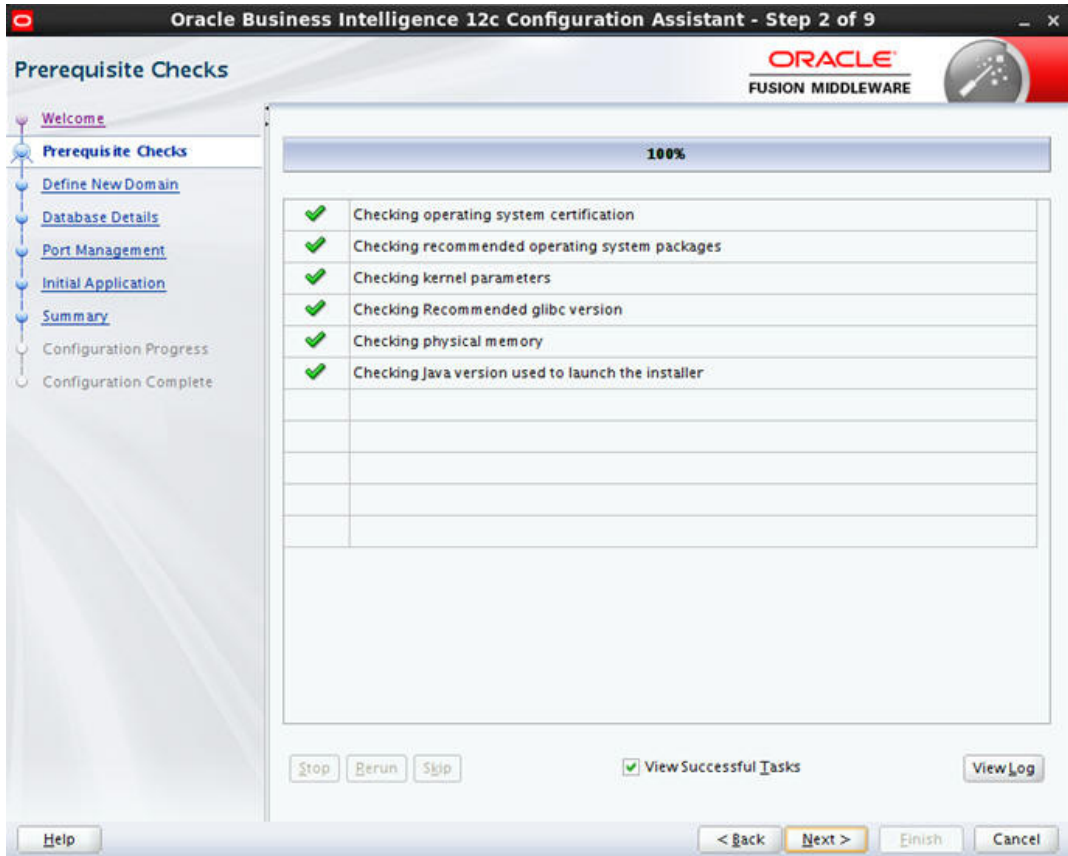
After installing BI Publisher, the next step is to configure BIP.

### To configure BIP

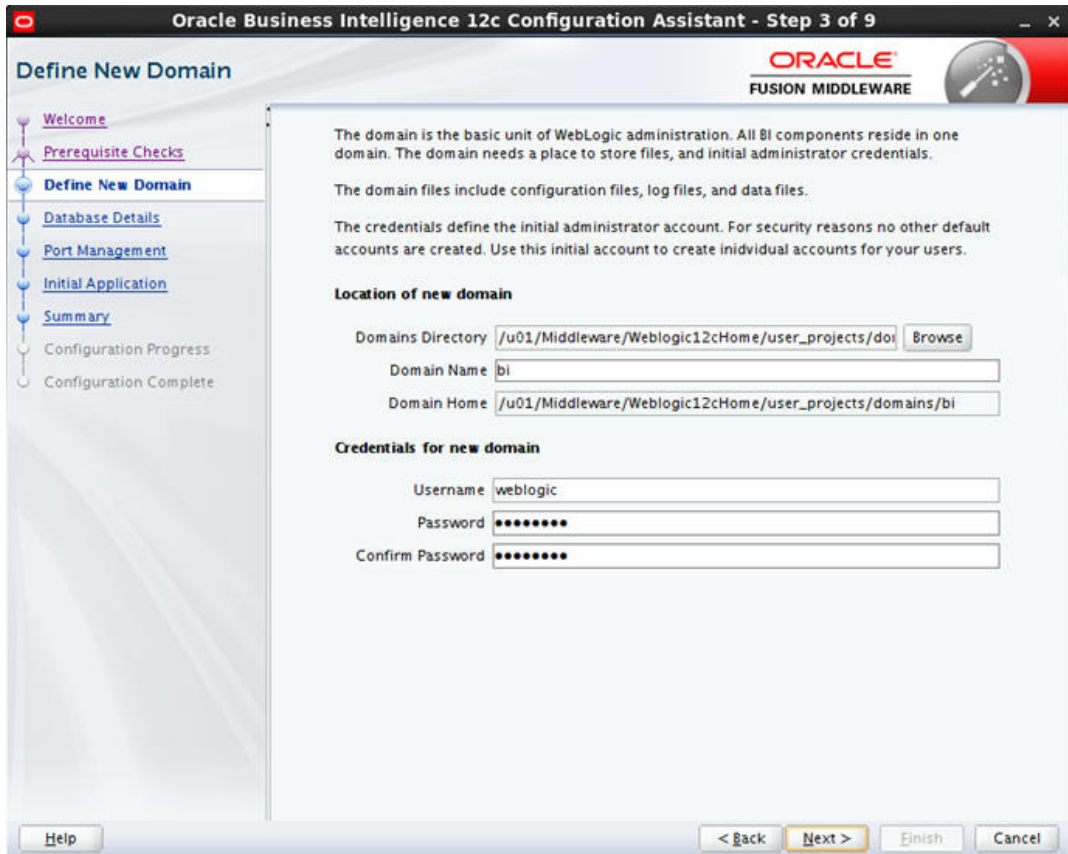
1. Launch configuration window and browse to \$BI\_HOME/bin (BI\_HOME is //u01/Middleware/Weblogic12cHome/bi).
2. Run ./config.sh. The following window is displayed.



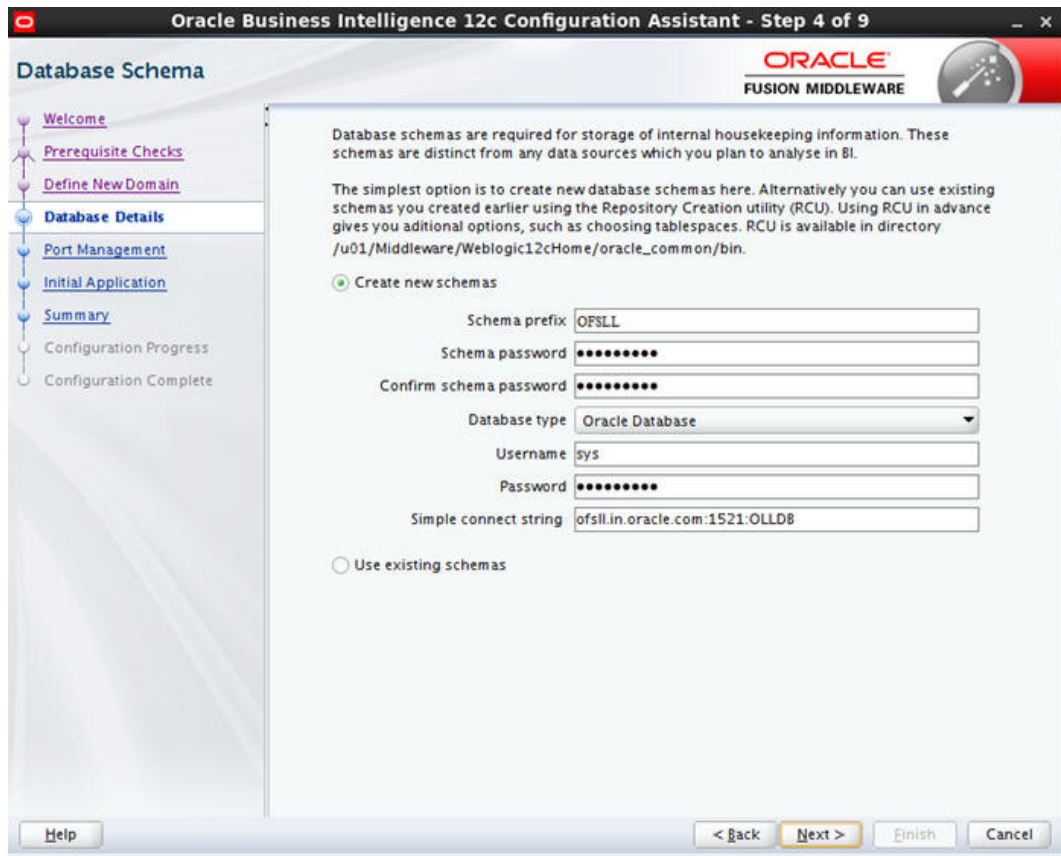
3. Select the option 'Business Intelligence Publisher' and Click 'Next'.



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

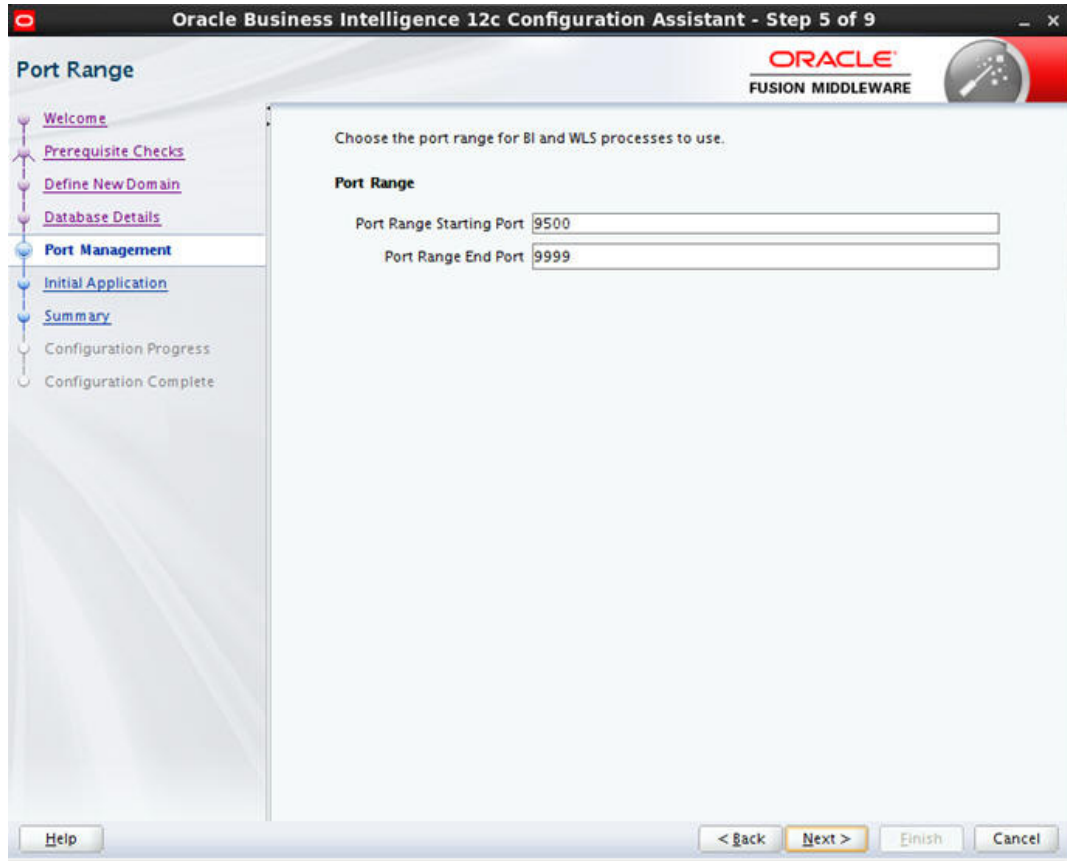


5. Enter the User Name, Password and Domain Name for BI Publisher domain. Click 'Next'. The following window is displayed.

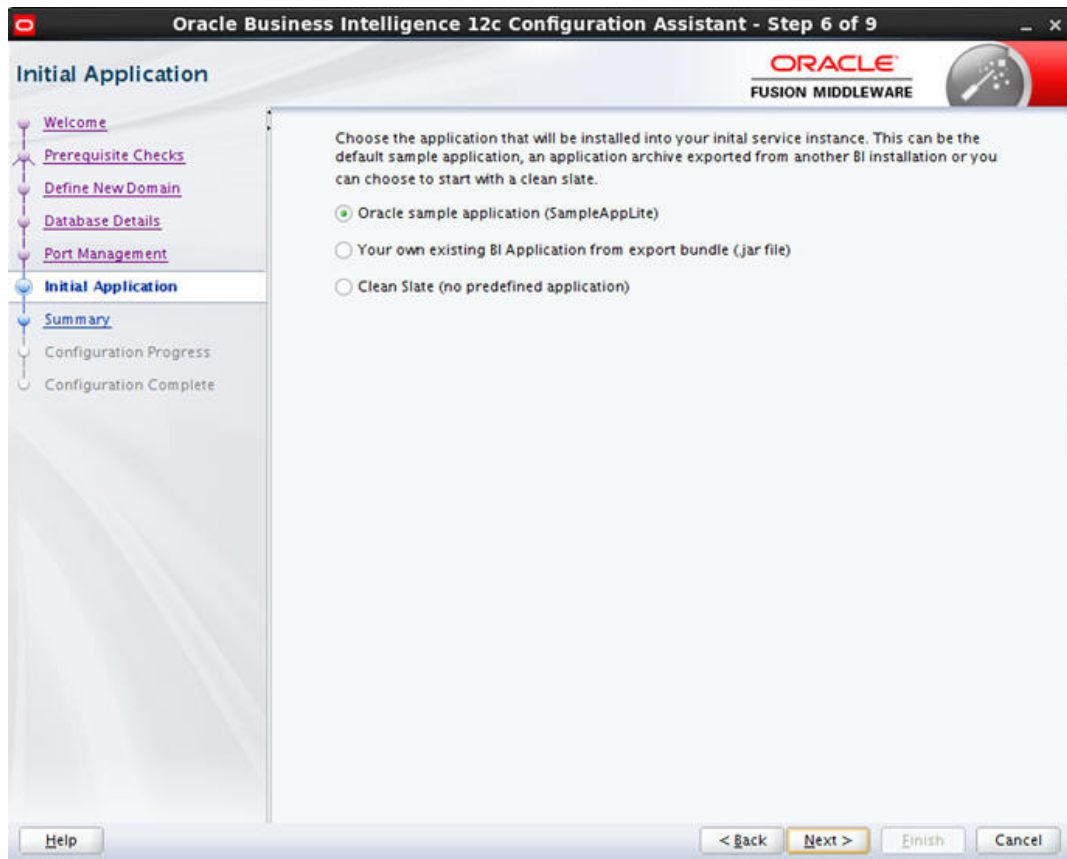


6. Select the option 'Create New Schema' and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.

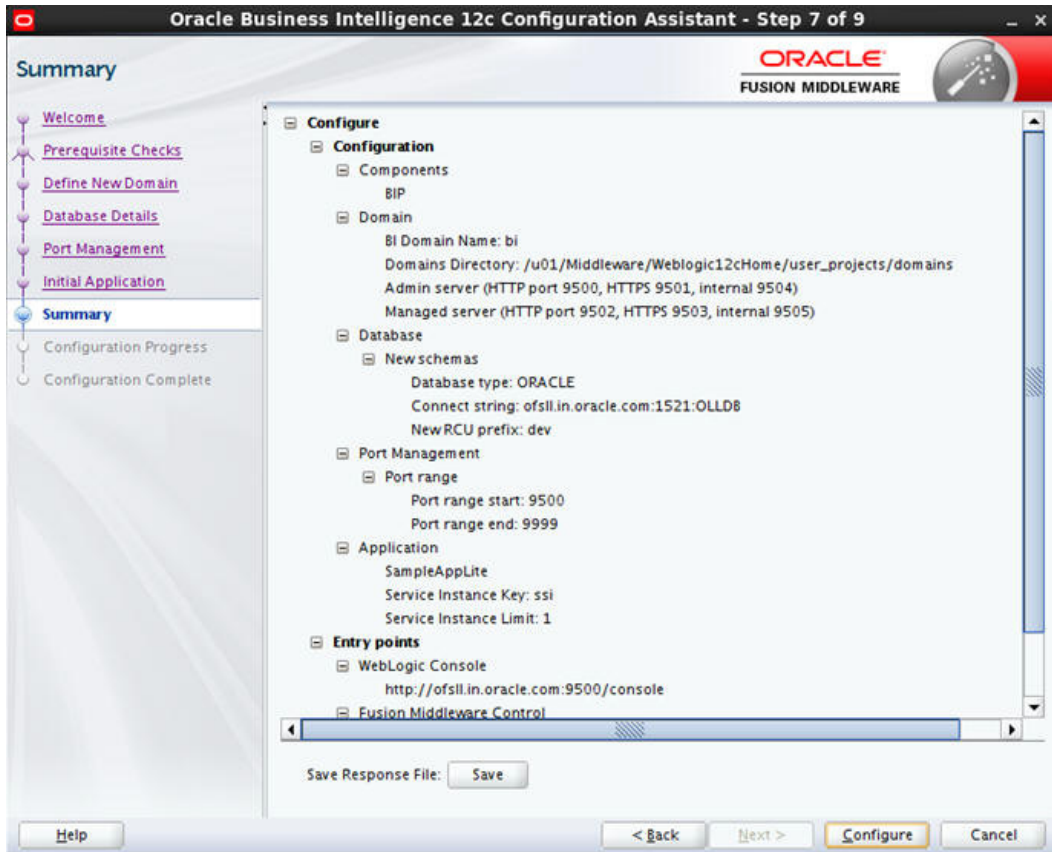
7. Click 'Next'. The following window is displayed.



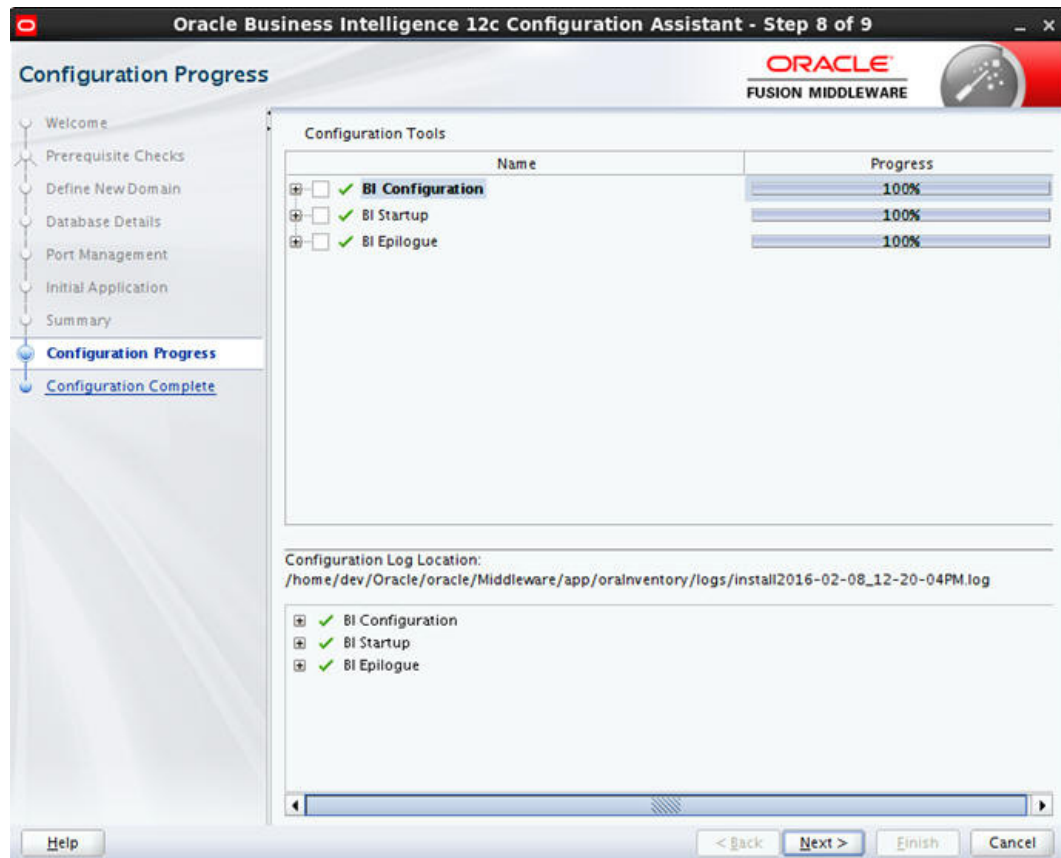
8. Click 'Next'. The following window is displayed.



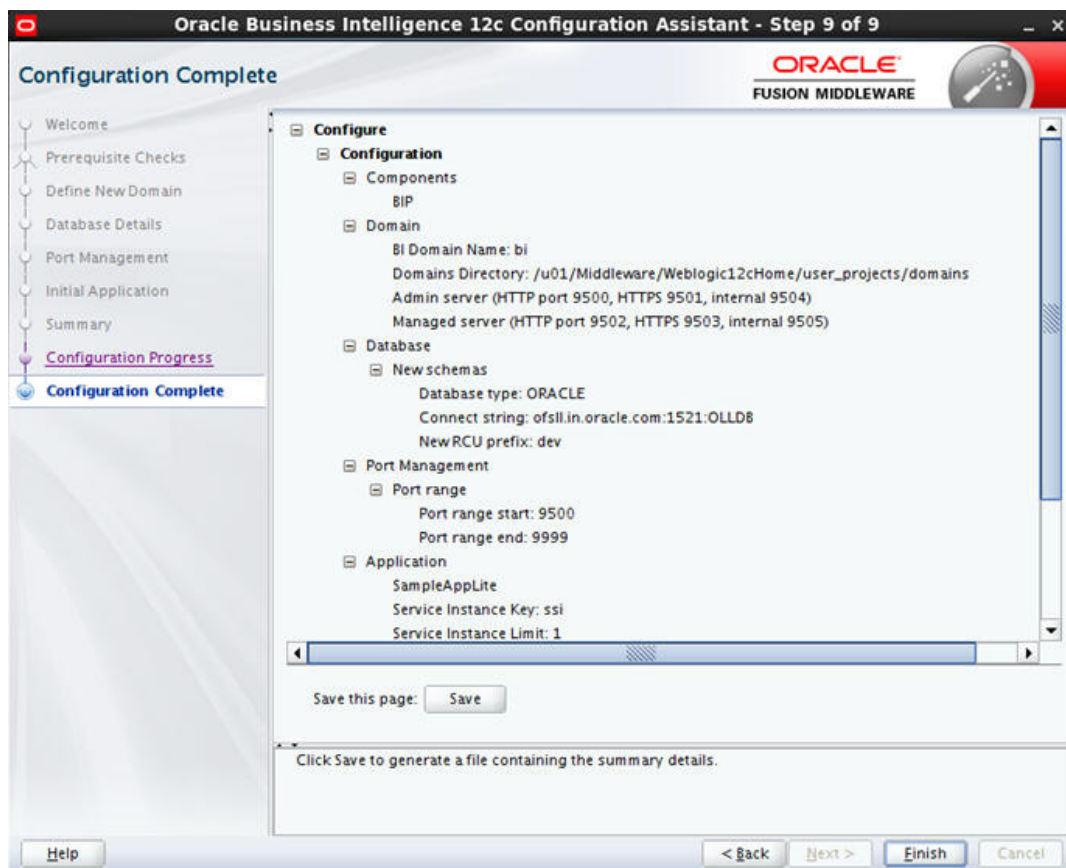
9. Click 'Next'. The following window is displayed.



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

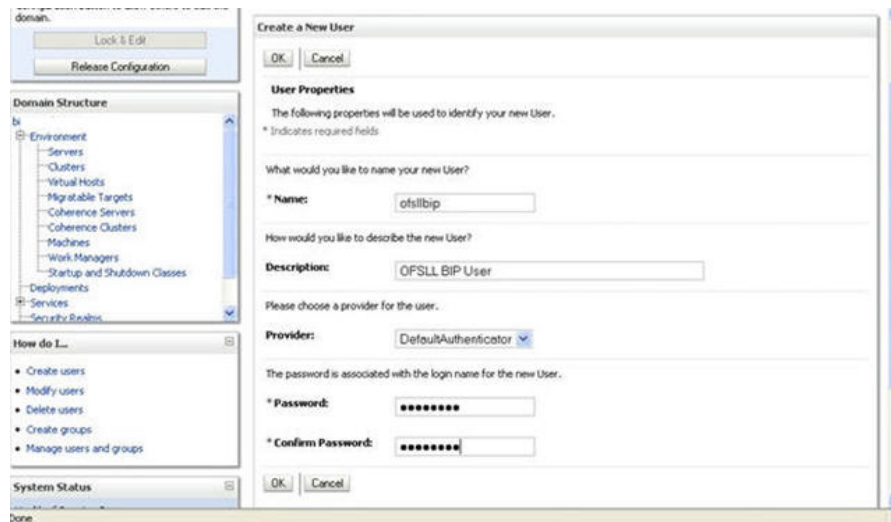
Successful BIP deployment can be verified by Launching the BIP URL <http://hostname:9502/xmlpserver>.

## 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.

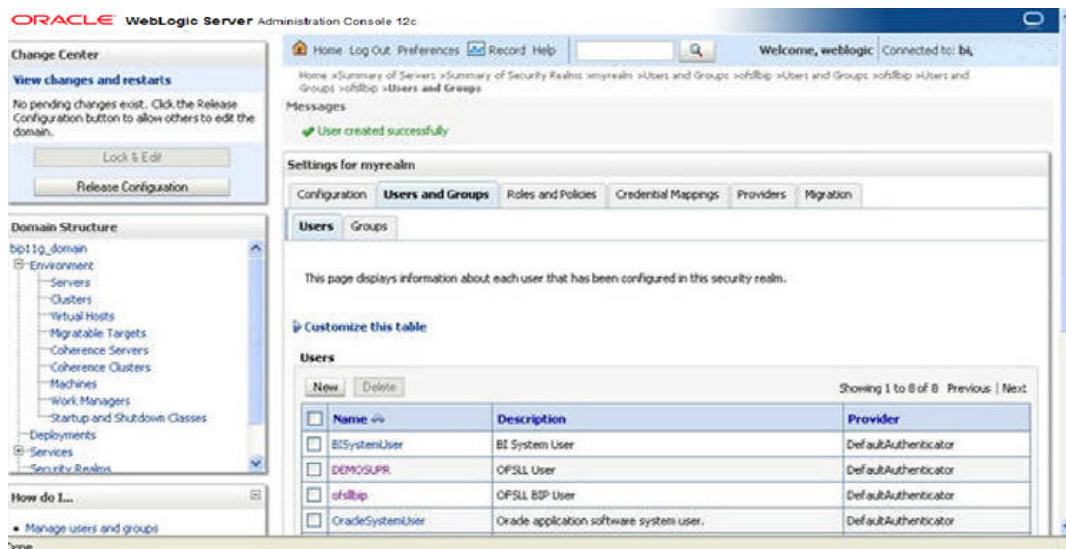


4. Specify the following details:

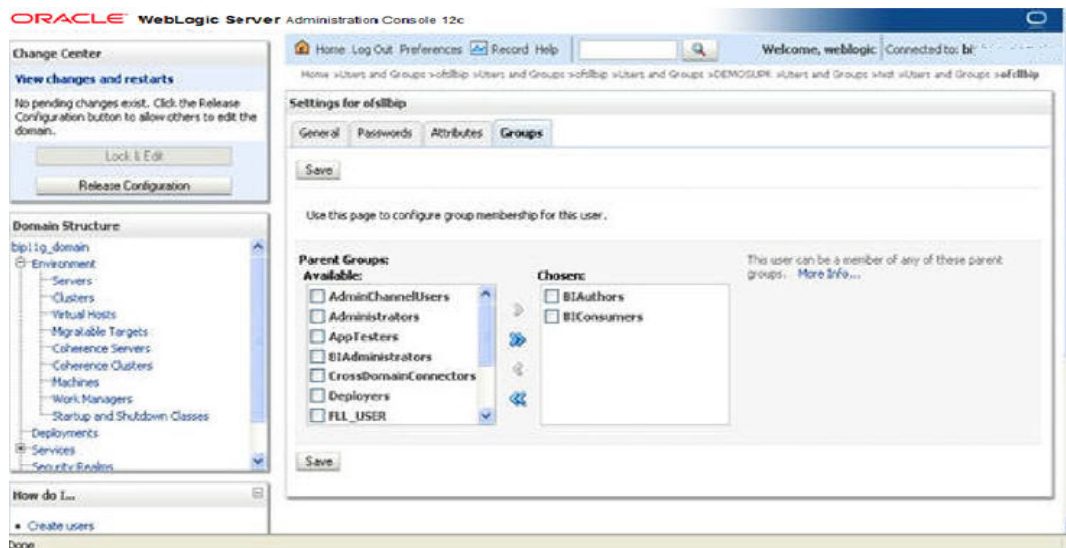
Field	Action
Name	Specify a valid name you need to maintain as User
Description	Provide description to the specified user
Provider	Select a provider for the user, from drop-down list.
Password	Specify a valid password you need to assign to the specified user.
Confirm Password	Retype the password to confirm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

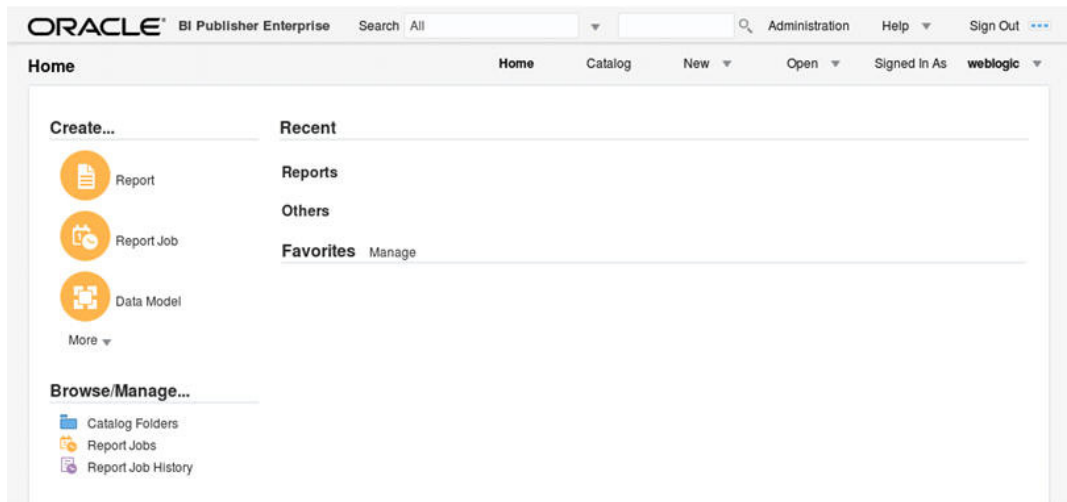
The screenshot shows the Oracle WebLogic Server Administration Console. The left sidebar contains a 'Domain Structure' tree with 'Data Sources' selected. The main content area displays the 'Summary of JDBC Data Sources' page. It includes a 'Configuration' tab and a table of data sources. The table has columns for Name, Type, JNDI Name, and Targets. The data sources listed are: 'bip\_datasource' (Generic, jdbc/bip\_datasource, bi\_cluster), 'EPMSysRegistry' (Generic, jdbc/EPMSysRegistry, bi\_cluster, AdminServer), 'mds-ovsm' (Generic, jdbc/mds/ovsm, bi\_cluster, AdminServer), and 'OFSLLBIPDB' (Generic, jdbc/ofsllbipdb, bi\_server1).

Name	Type	JNDI Name	Targets
bip_datasource	Generic	jdbc/bip_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

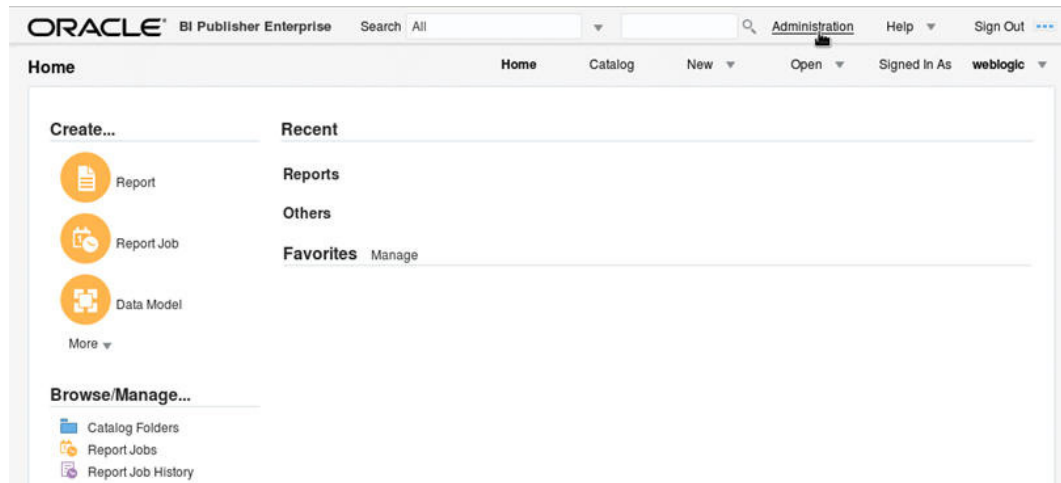
2. Launch <http://hostname:port/xmlpserver>. The following window is displayed.

The screenshot shows the Oracle BI Publisher Enterprise Sign In page. It features a 'Sign In' section with the instruction 'Please 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)'. The footer contains the text: 'Oracle BI Publisher 12.2.1.0.0 Copyright © 2003, 2015, Oracle and/or its affiliates. All rights reserved.'

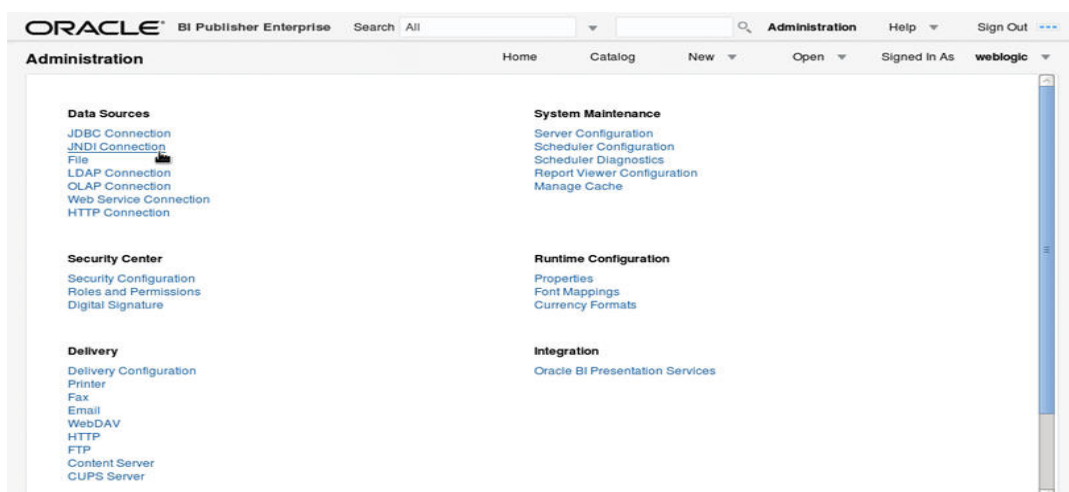
3. Login using the same credentials used for 'WebLogic administration' console login. The following window is displayed.



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

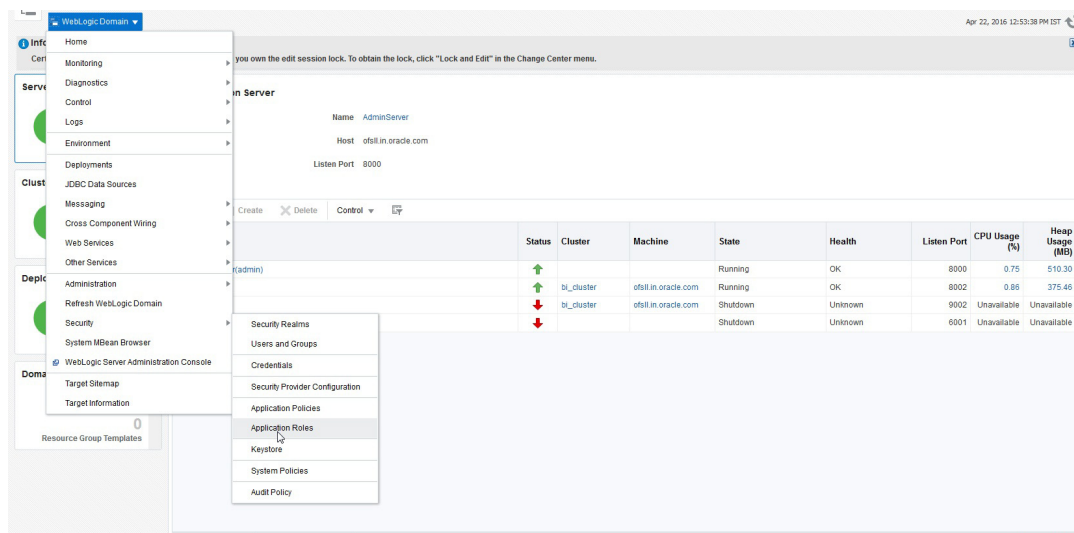
If "BI Author" and "BI Consumer" roles are not displayed in the 'Available Roles' section, you need to create the roles as explained in following 'Creating Roles' section.

## 5.1 Creating Roles

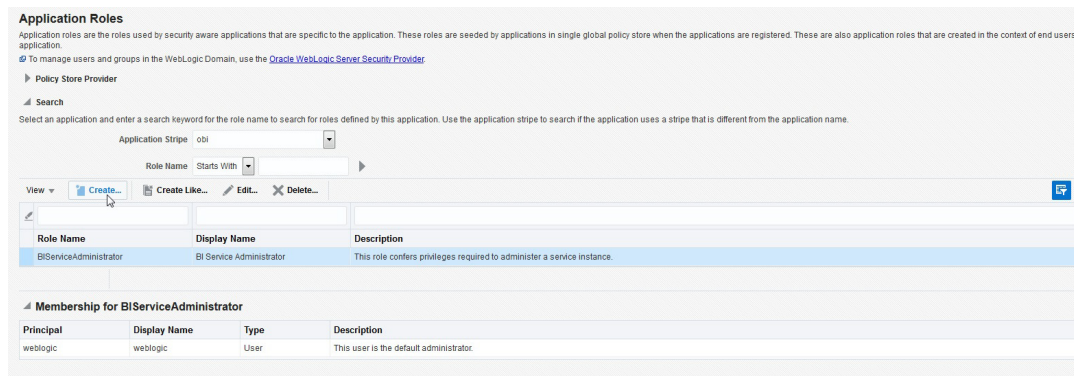
The following section details the steps to be followed to create "BI Author" and "BI Consumer" roles which are used to define security roles while creating Data Source on BI Publisher Domain.

### 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: obf

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 + + Add ✕ Delete... 🔗 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: obf

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: obf

Role Name: Starts With

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

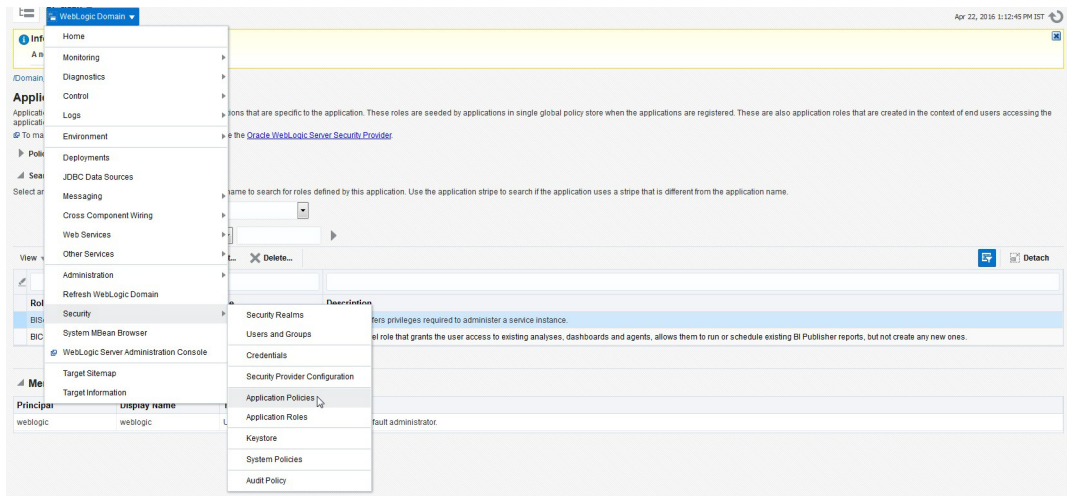
Role Name	Display Name	Description
BIServiceAdministrator	BI Service Administrator	This role confers privileges required to administer a service instance.
BIConsumer	BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule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

**Membership for BIServiceAdministrator**

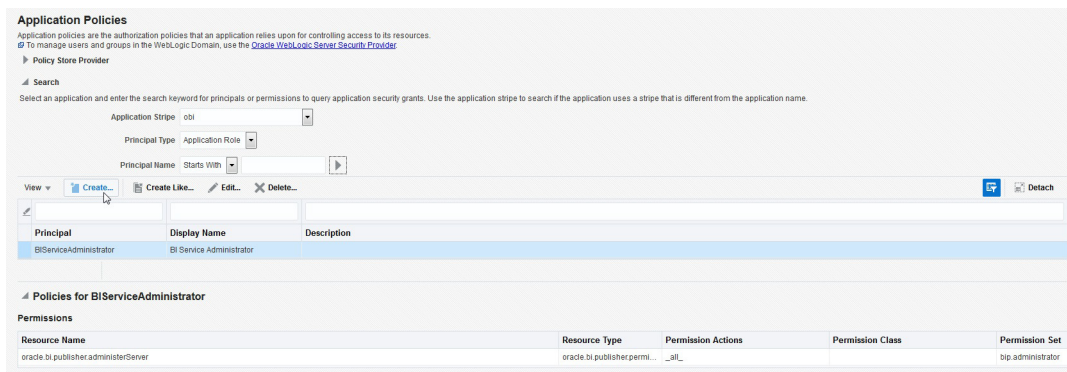
Principal	Display Name	Type	Description
weblogic	weblogic	User	This user is the default administrator.

## To Create WebLogic Application Policies

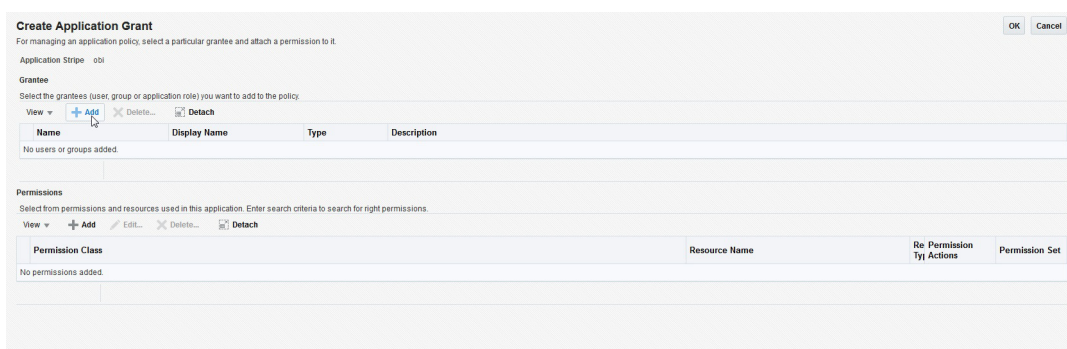
1. Login to Enterprise Manager using the URL - <http://hostname:port/em>.
2. Select Weblogic Domain > Security > Application Policies as indicated in the following screen:



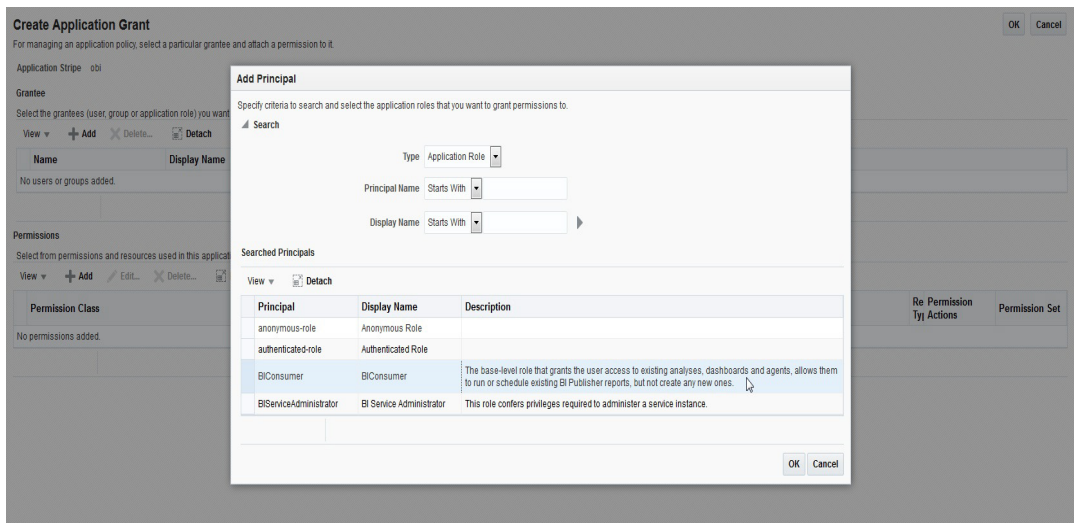
3. In the Application Stripe field, select 'obi' from the drop-down list. Click 'Create'.



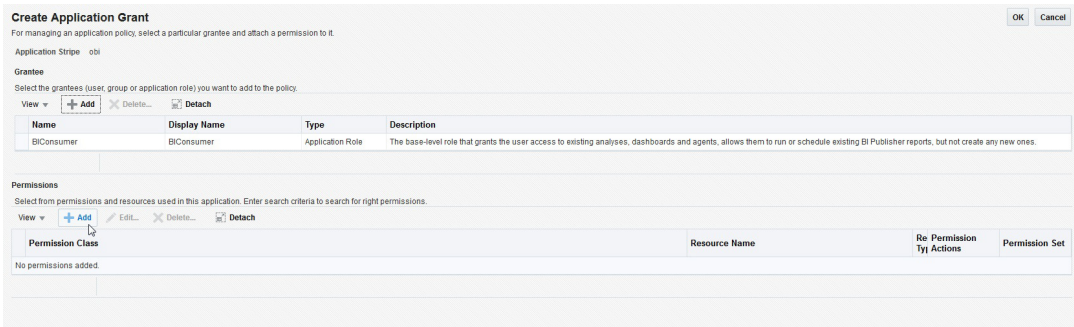
4. In 'Create Application Grant' screen, under the Grantee section, click 'Add'.



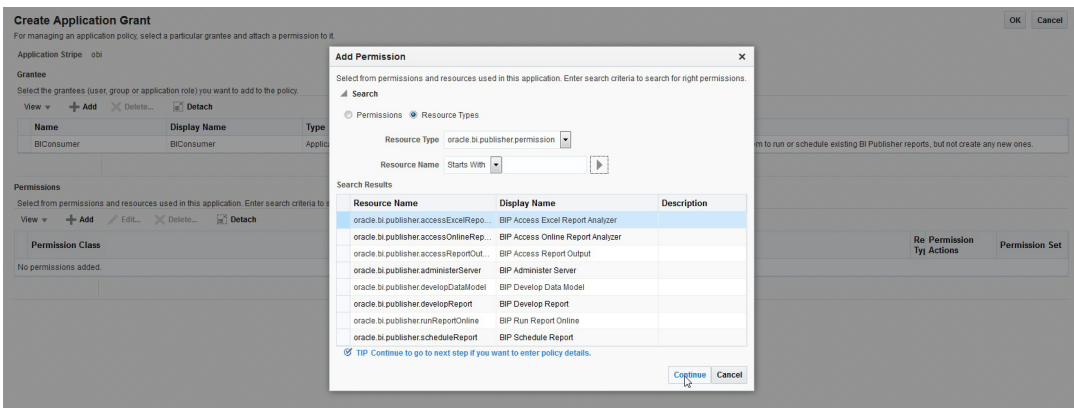
- Select the newly created application role from the list and click 'OK'. The new role is added to the list.



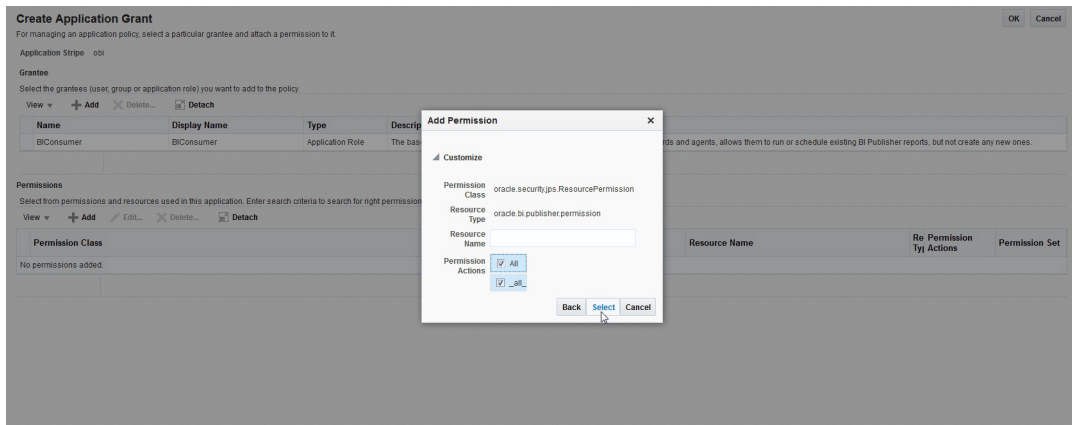
- In the 'Permissions' section, click 'Add'.



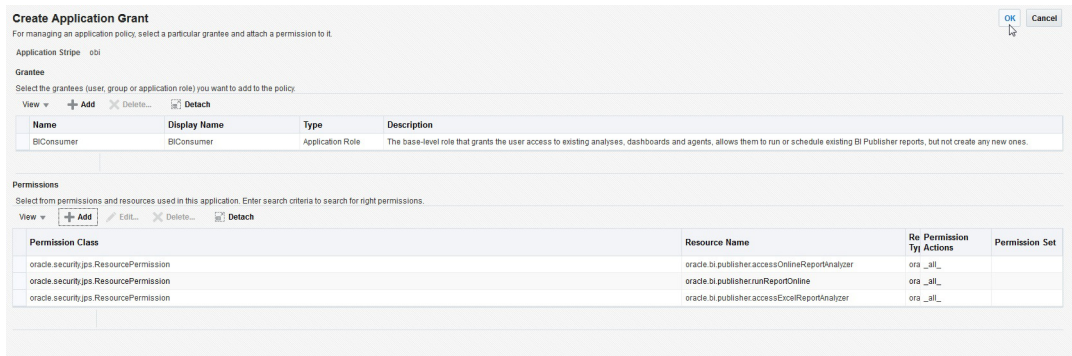
- In the search criteria, select 'Resource Type' and select the resource type from the drop-down list. Select the required resource from the search results and click 'Continue'.



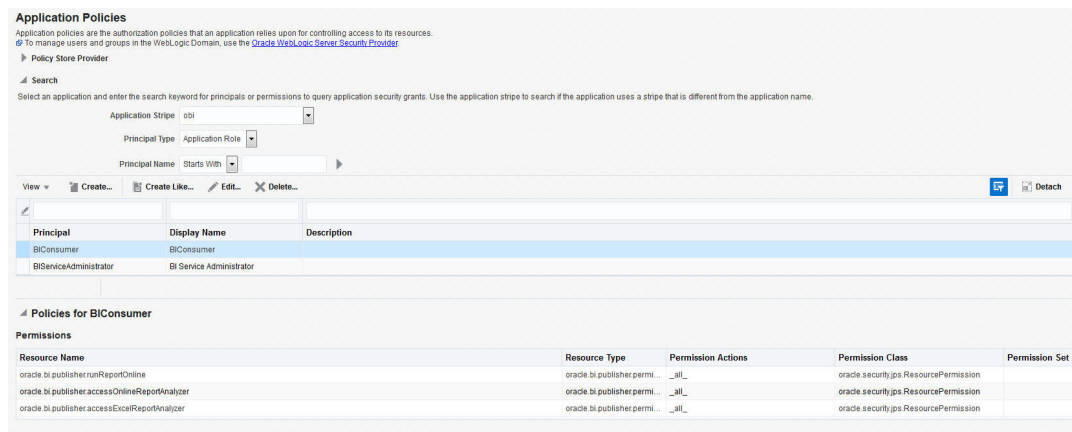
- Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click 'Select'.



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



- Once done, click 'OK'.

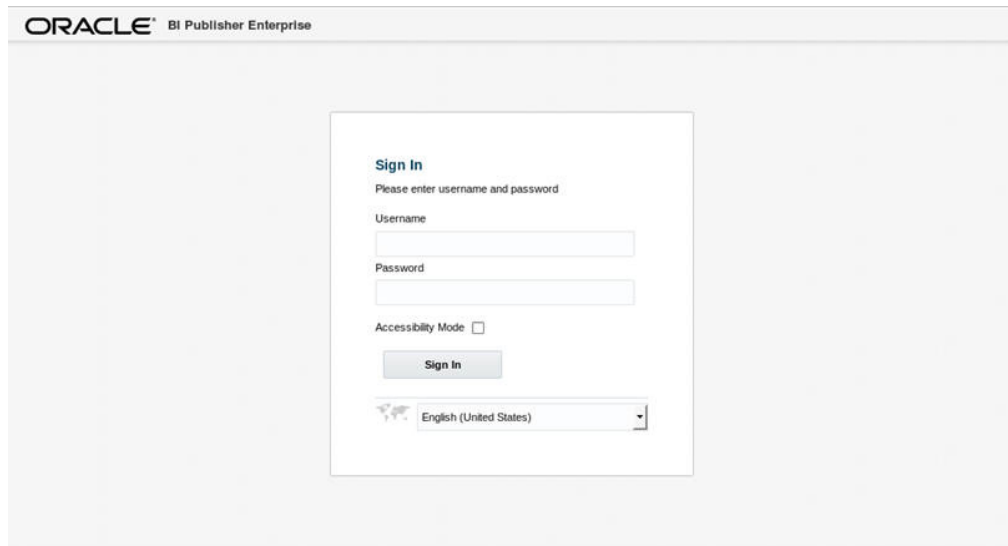




## 6. Importing Reports to BI Publisher Server

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

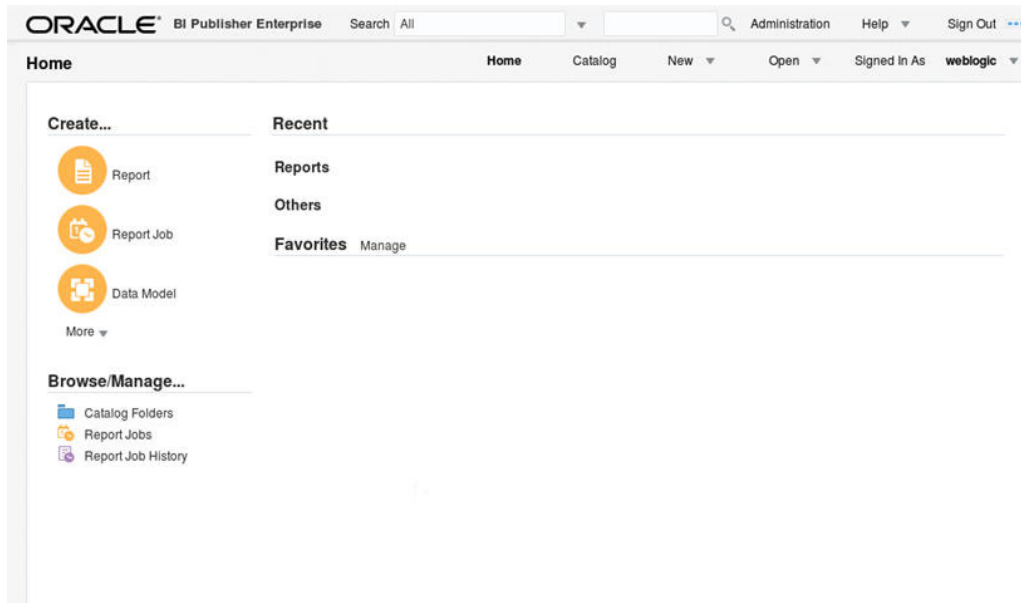
1. Copy and extract the OFSLLReports.zip file to local area. Assume you have extracted to /home/oracle/app/OFSLLReports, then the zip file "oracle.xdrz" is extracted to /home/oracle/app/OFSLLReports
2. Launch the Oracle Business Intelligence Publisher Application using http://hostname:port/xmlpserver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



The screenshot shows the Oracle BI Publisher Enterprise Sign In page. The page title is "ORACLE 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 (Submit button)
- Language dropdown menu (Currently set to English (United States))

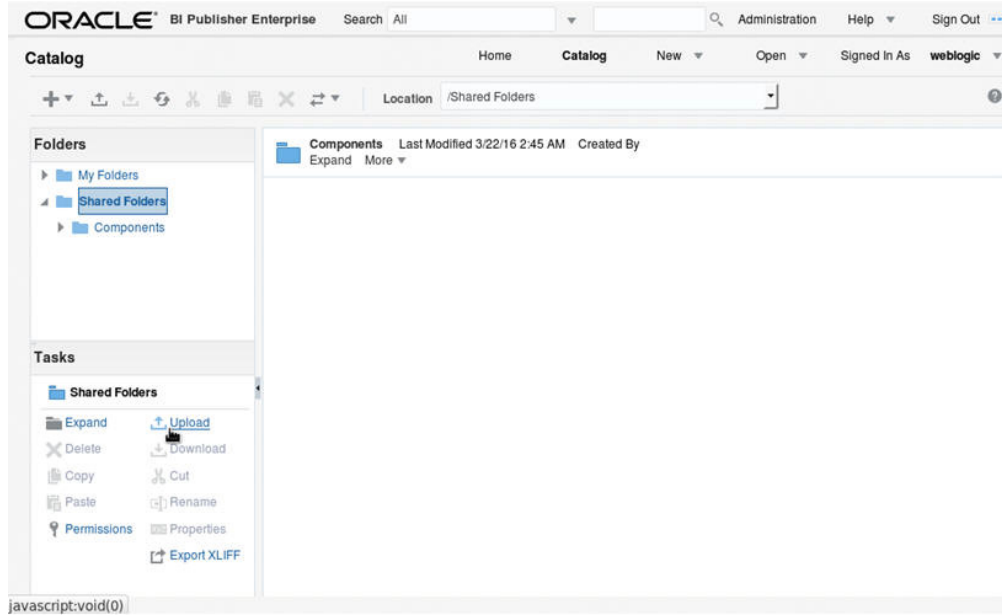
4. Following window is displayed. Click on 'Catalog Folders' on the left pane.



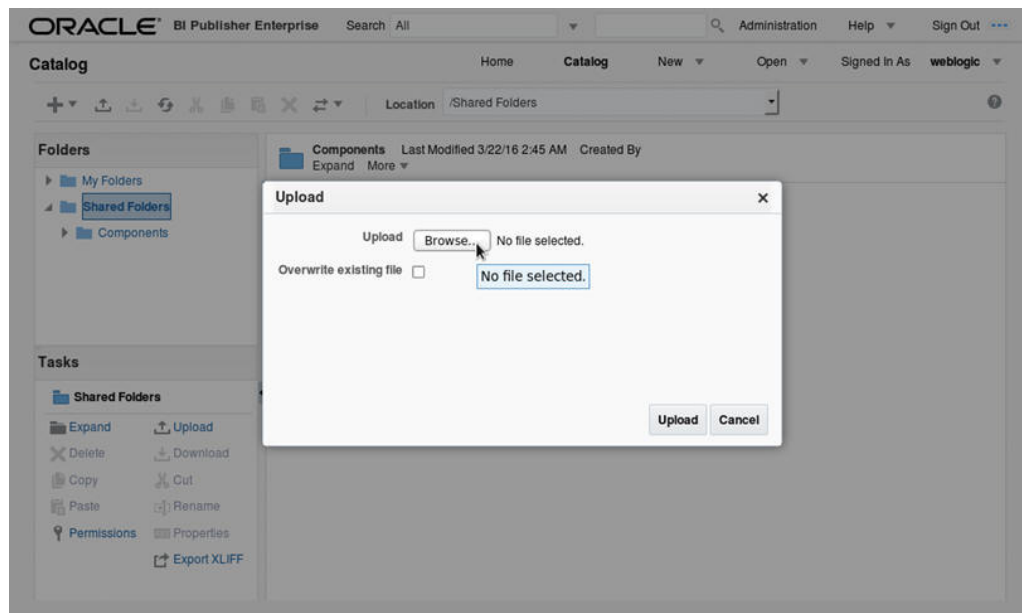
The screenshot shows the Oracle BI Publisher Enterprise Home page. The page title is "ORACLE BI Publisher Enterprise". The page contains the following elements:

- Search: All
- Administration Help Sign Out
- Home Catalog New Open Signed In As **weblogic**
- Create...**
  - Report
  - Report Job
  - Data Model
  - More
- Recent**
  - Reports
  - Others
  - Favorites Manage
- Browse/Manage...**
  - Catalog Folders
  - Report Jobs
  - Report Job History

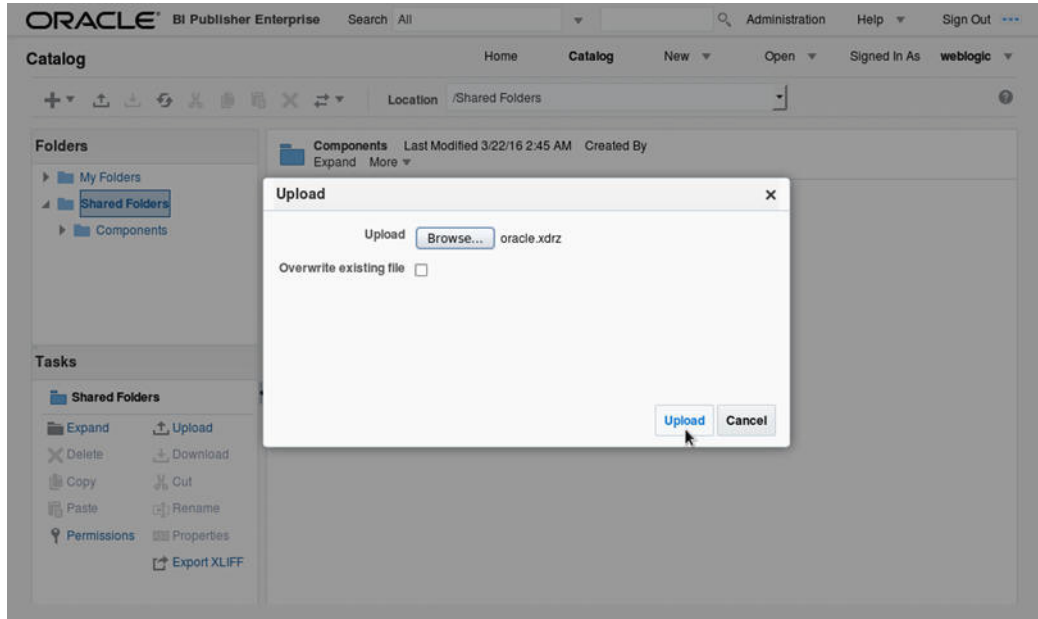
5. Click on 'Shared Folders' option and then click 'Upload'.



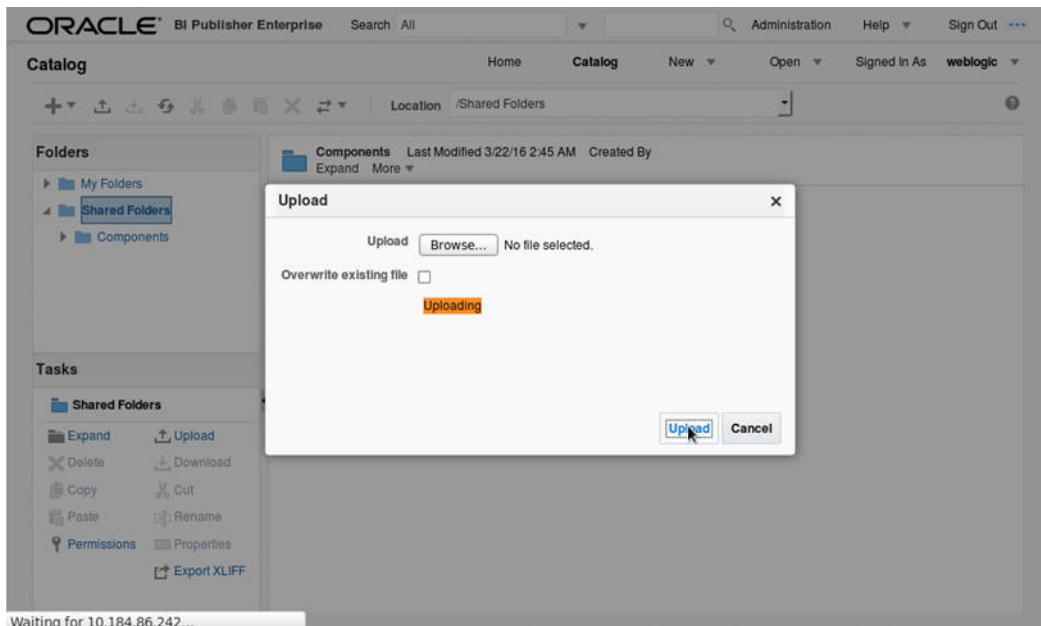
6. The following window is displayed. Browse to the location where the oracle.xrzr file is saved. Click the 'Overwrite Existing File' check box if you are overwriting an existing directory.



7. Click on 'Upload'.

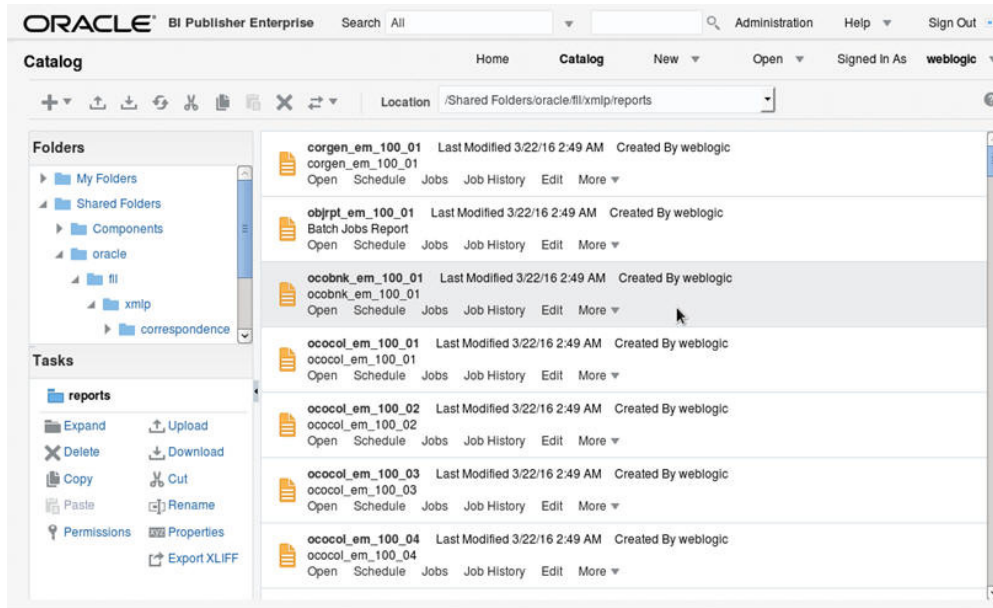


8. The following window is displayed.



Waiting for 10.184.86.242...

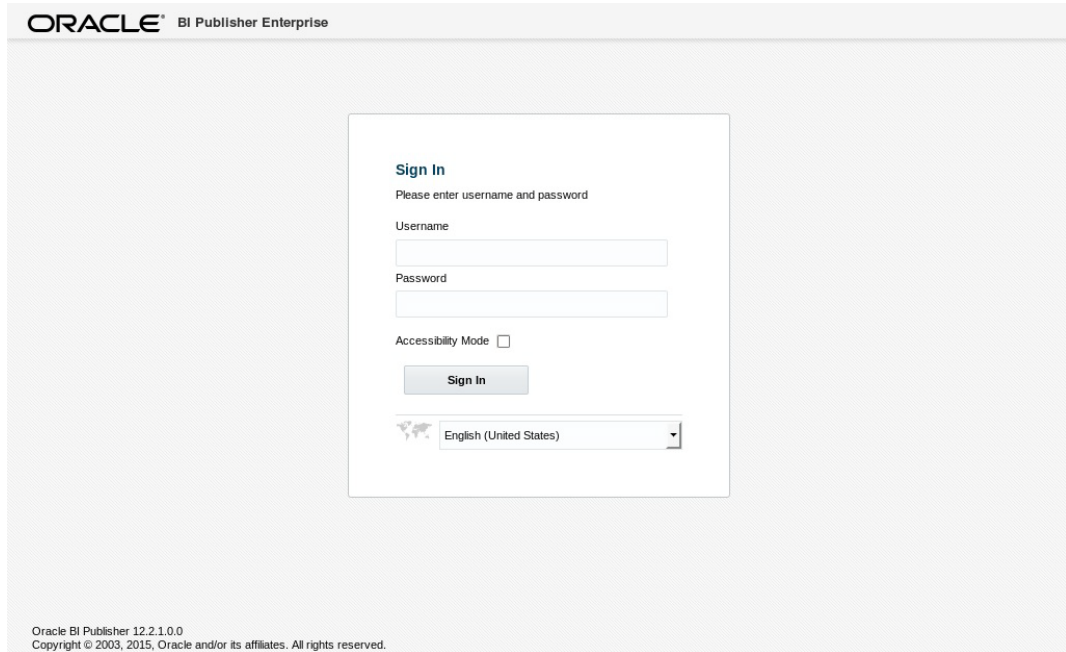
9. Once the upload is completed, click any folder to see the list of reports under the directory. The following window is displayed.



## 7. Configure MDB Mail Server

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

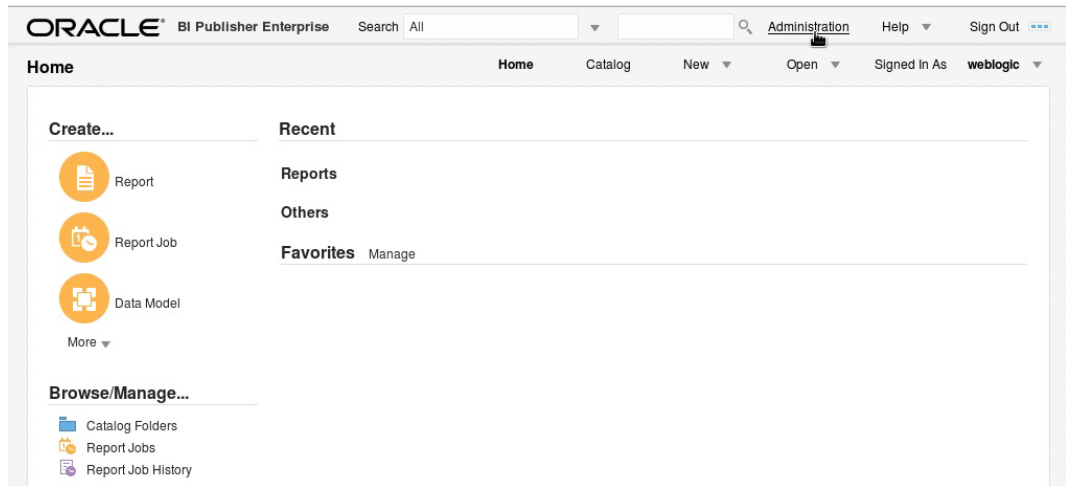
1. Launch the Oracle Business Intelligence (BI) Publisher application (<http://hostname:port/xmlpserver>). The following window is displayed.



The screenshot shows the Oracle BI Publisher Enterprise Sign In page. At the top left, it says "ORACLE® BI Publisher Enterprise". The main content area is a white box with a light gray border. Inside, it has a "Sign In" heading, followed by the instruction "Please enter username and password". There are two input fields: "Username" and "Password". Below these is an "Accessibility Mode" checkbox, which is unchecked. A "Sign In" button is centered below the checkbox. At the bottom of the box is a language dropdown menu showing "English (United States)".

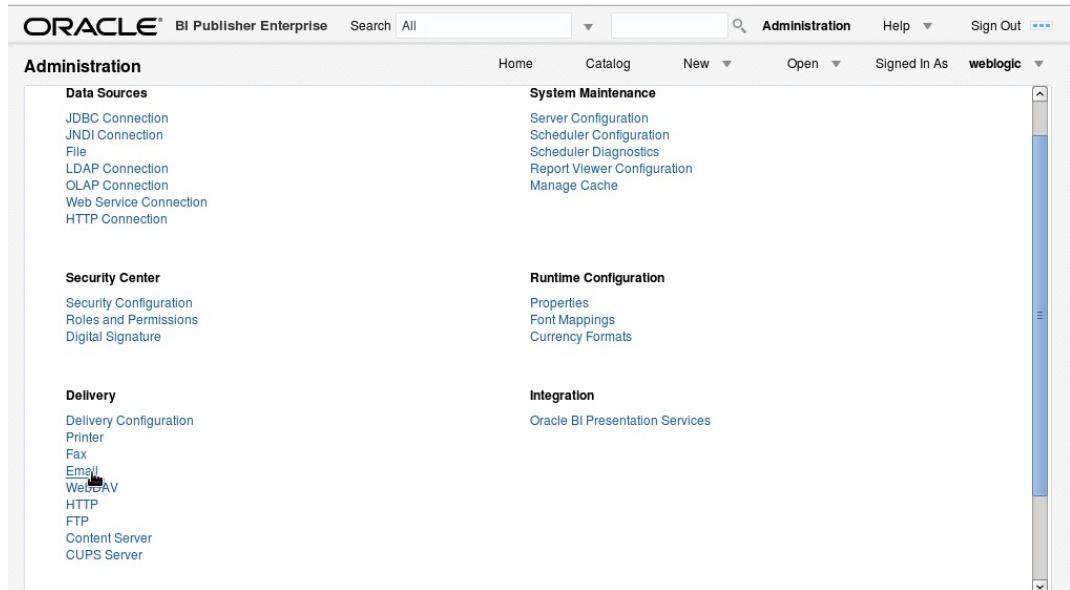
Oracle BI Publisher 12.2.1.0.0  
Copyright © 2003, 2015, Oracle and/or its affiliates. All rights reserved.

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

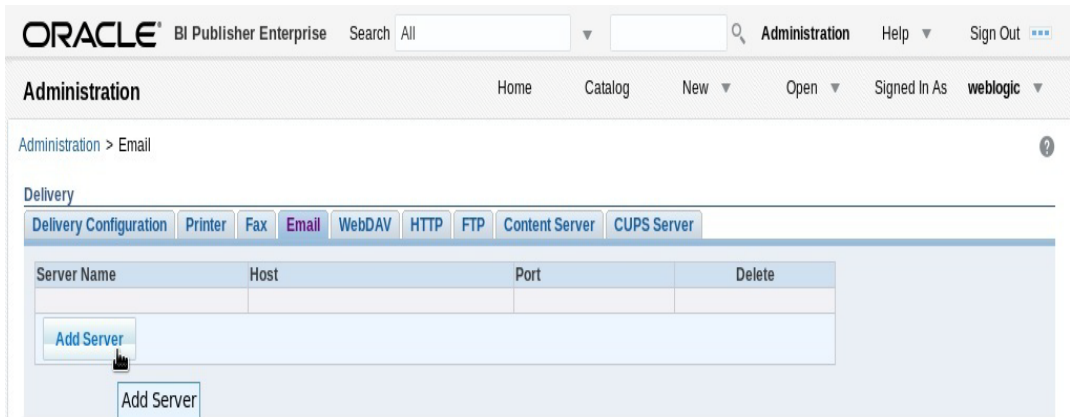


The screenshot shows the Oracle BI Publisher Enterprise Home page. At the top, it says "ORACLE® BI Publisher Enterprise" and has a search bar with "All" selected. There are links for "Administration", "Help", and "Sign Out". Below the header is a navigation bar with "Home", "Catalog", "New", "Open", "Signed In As", and "weblogic". The main content area is divided into three sections: "Create...", "Recent", and "Browse/Manage...". The "Create..." section has icons for "Report", "Report Job", and "Data Model", with a "More" link. The "Recent" section has "Reports" and "Others" sections. The "Browse/Manage..." section has "Catalog Folders", "Report Jobs", and "Report Job History".

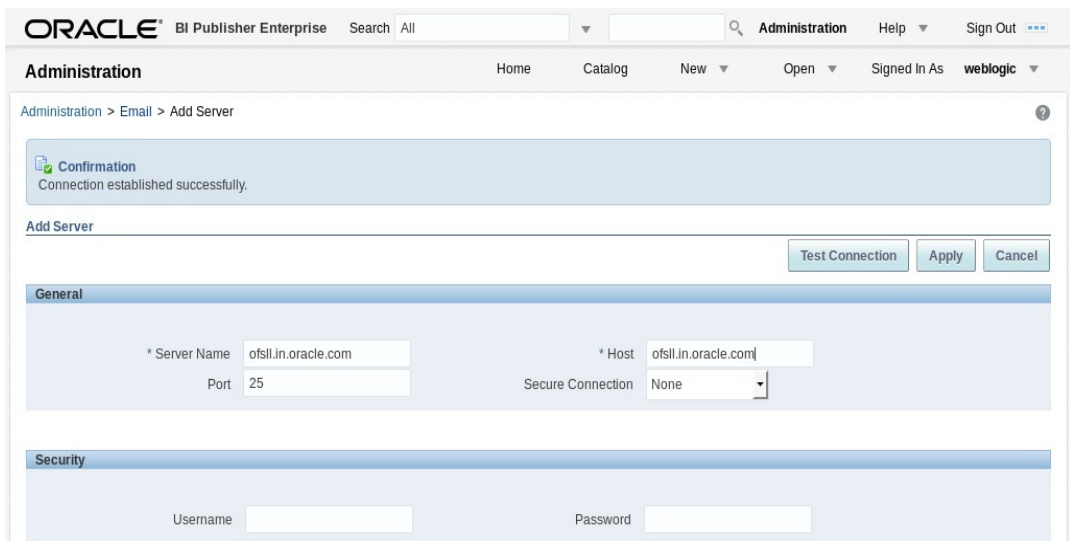
3. Click 'Administration'. The following window is displayed.



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 Administration console. The breadcrumb trail is Administration > Email > Add Server. The 'Add Server' dialog box is open, showing the 'General' tab. The fields are: \* Server Name: ofssl.in.oracle.com, \* Host: ofssl.in.oracle.com, Port: 25, and Secure Connection: None. There are buttons for 'Test Connection', 'Apply', and 'Cancel'. An 'Apply' button is also visible on the right side of the 'General' tab header.

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

The screenshot shows the Oracle BI Publisher Administration console. The breadcrumb trail is Administration > Email. The 'Delivery' section is active, with tabs for Delivery Configuration, Printer, Fax, Email, WebDAV, HTTP, FTP, Content Server, and CUPS Server. The 'Email' tab is selected. A table lists the added server:

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

Below the table is an 'Add Server' button.