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.

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

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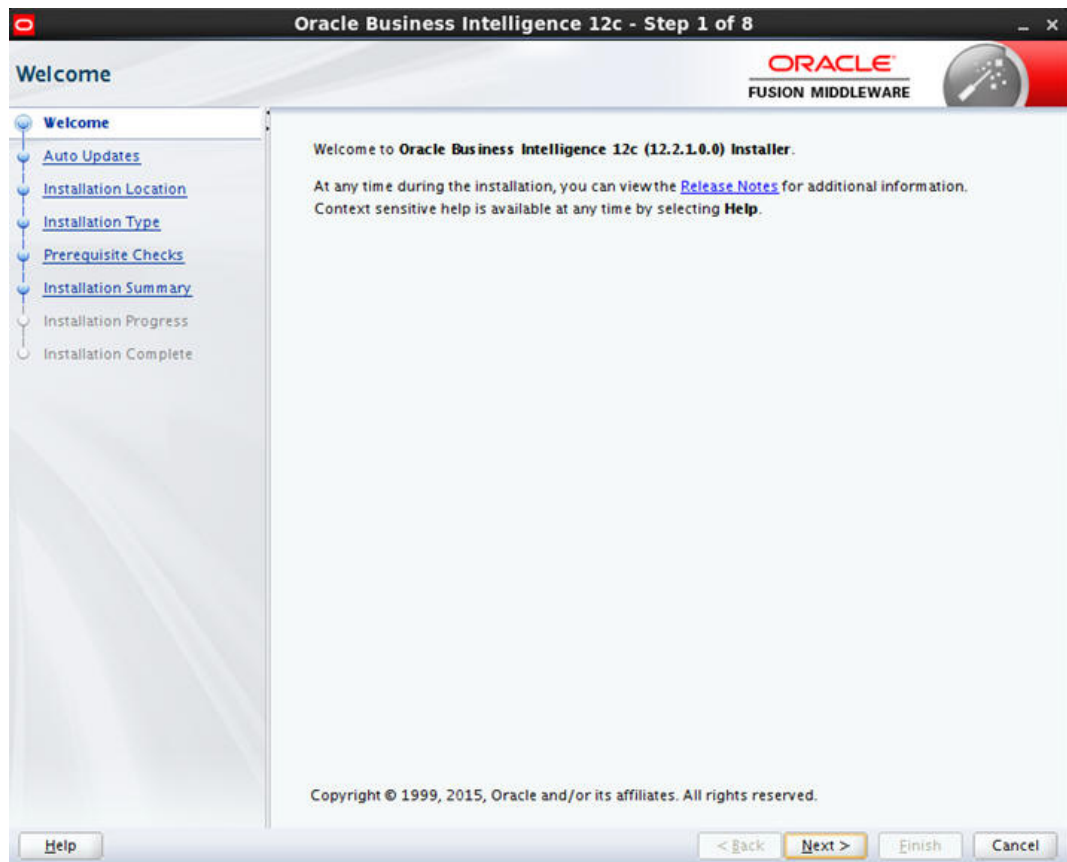
5. Click 'Next'. The following window is displayed.

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6. Select the option 'Skip Software Updates' and click 'Next'. The following window is displayed.
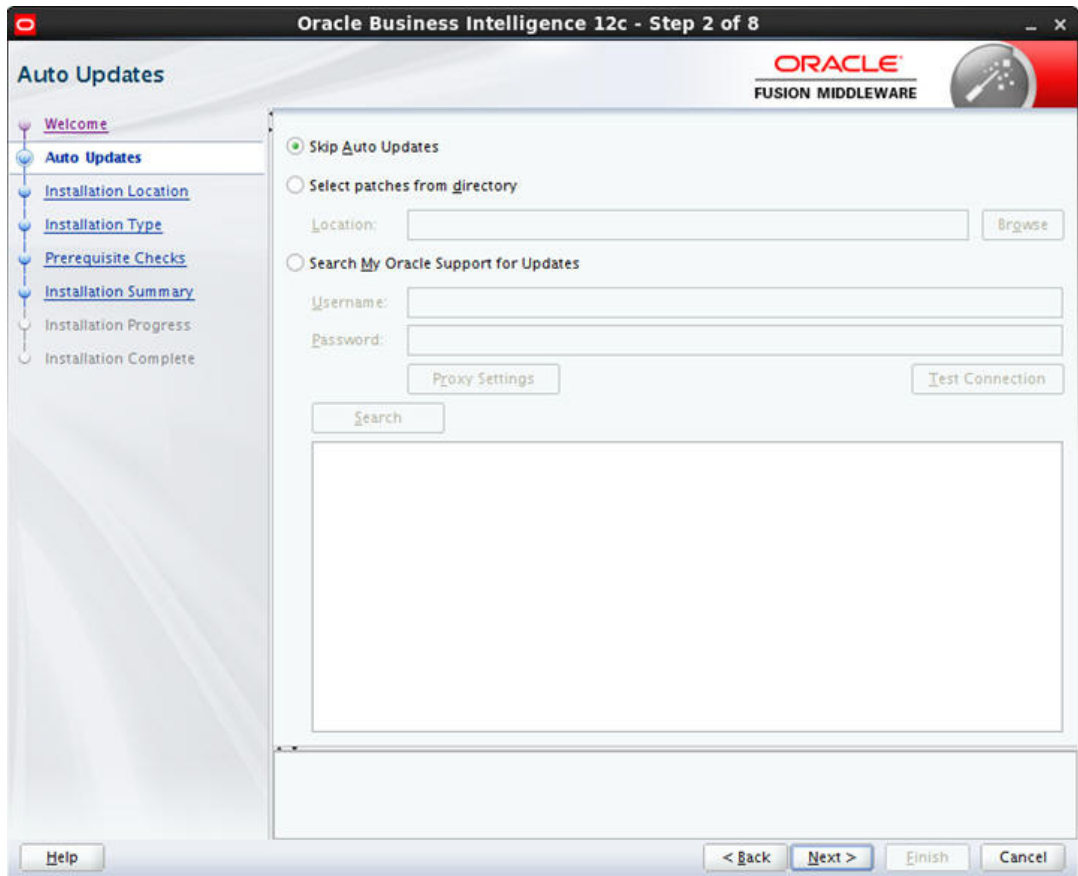
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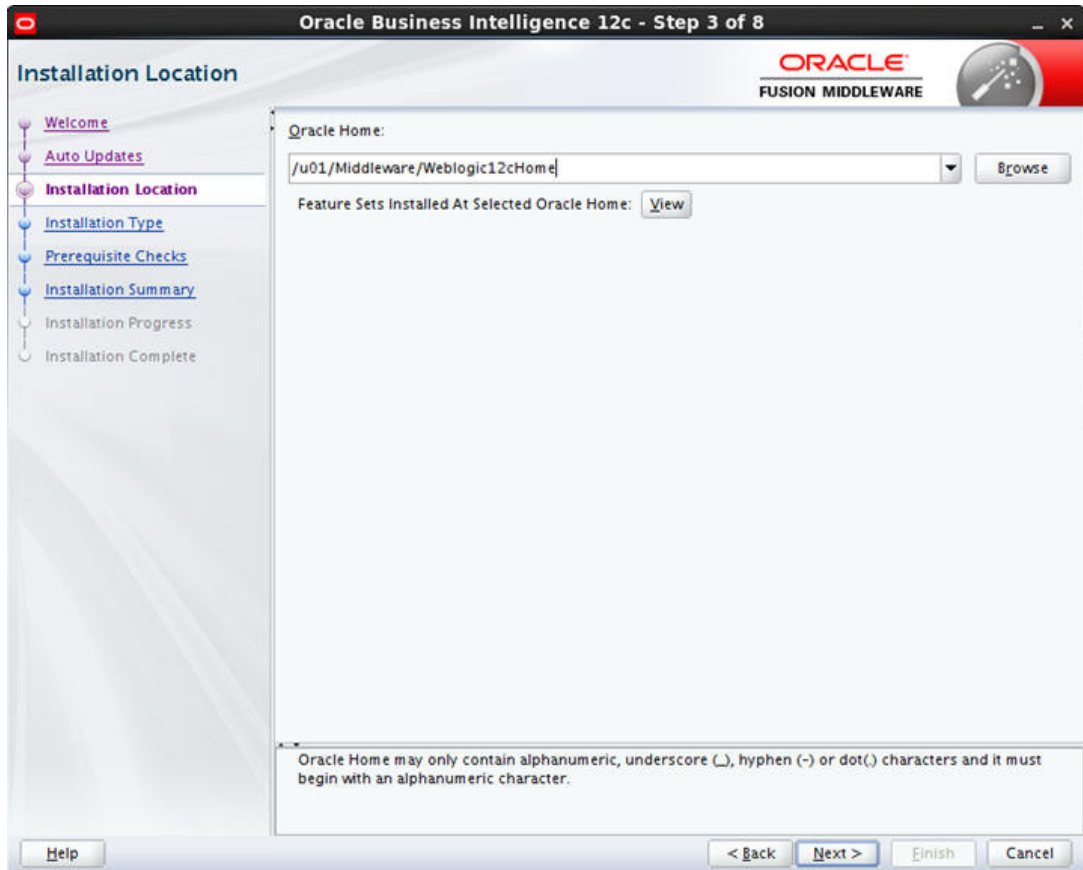7. Browse Oracle Middleware Home path as /u01/Middleware/Weblogic12cHome.

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

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

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

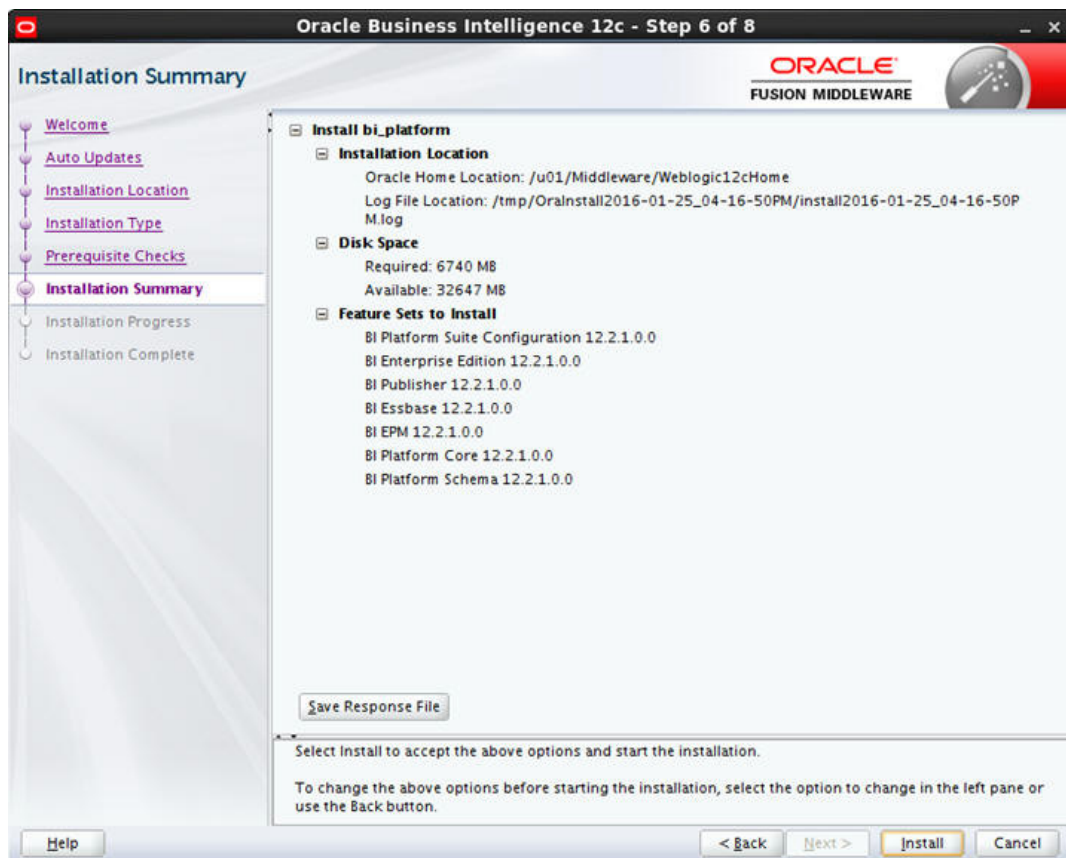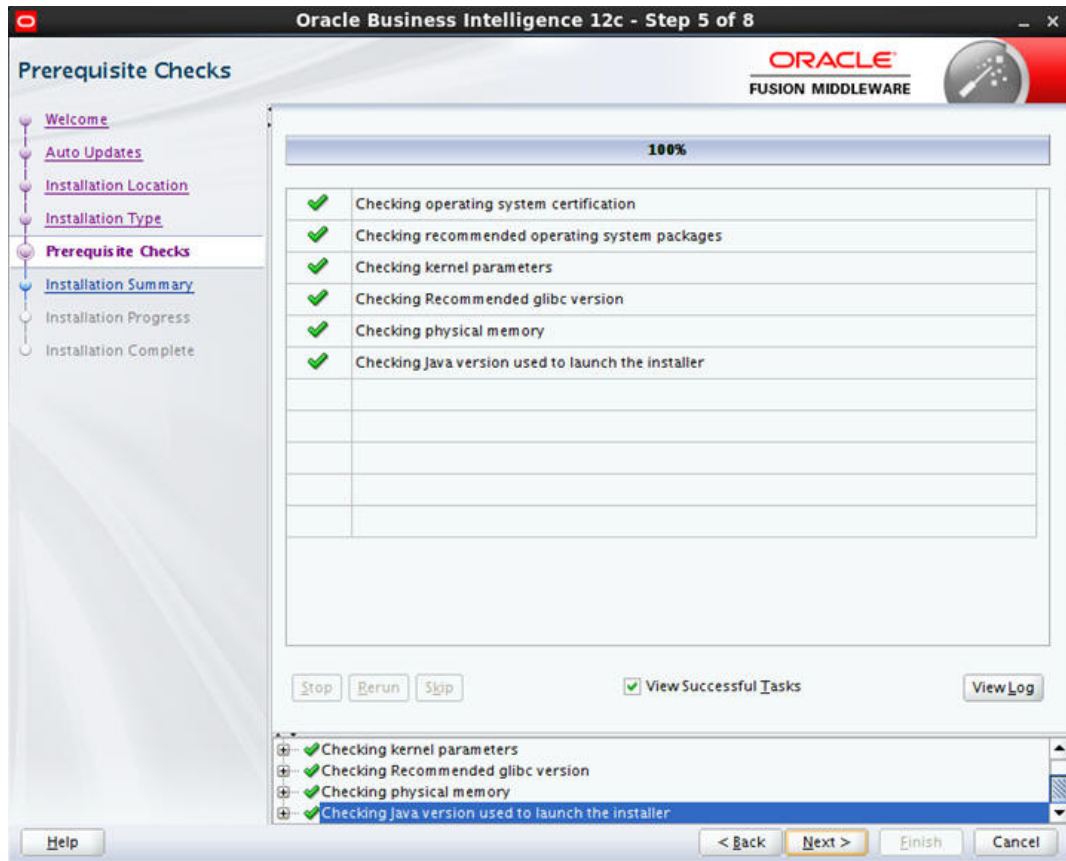11. Once the installation is complete click 'Next' and then click 'Finish' to close.

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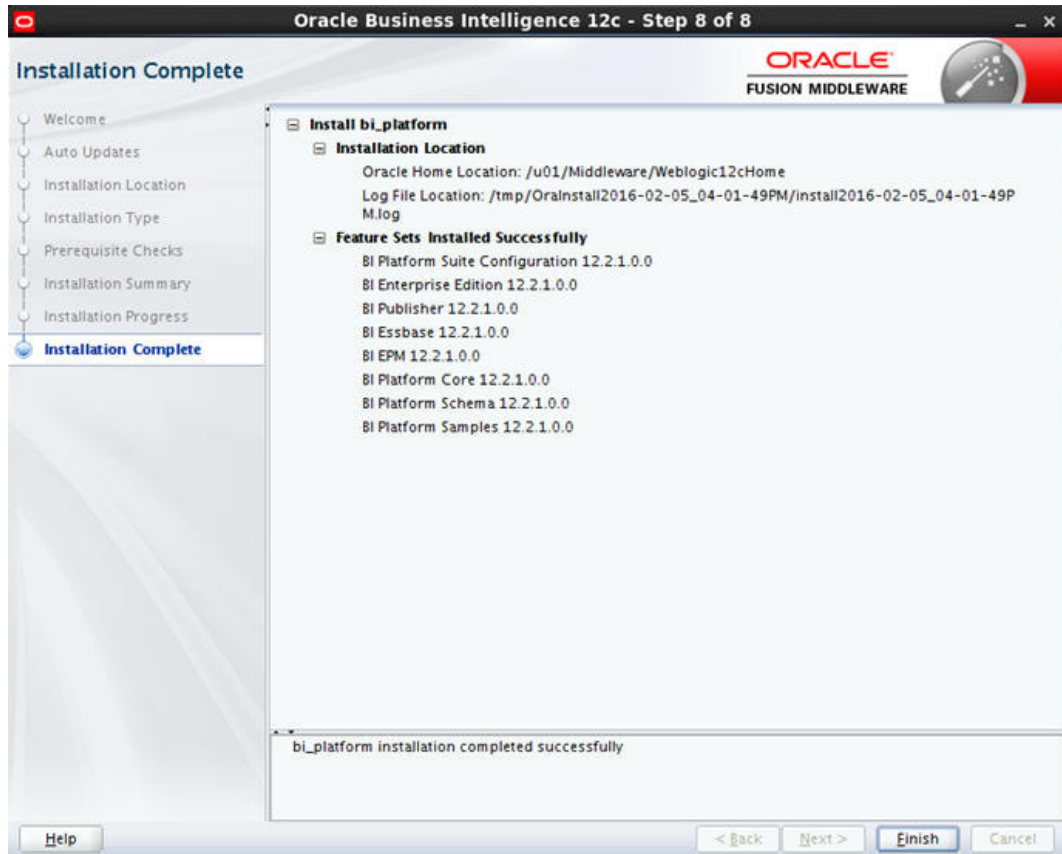
3. Configuring BI Publisher
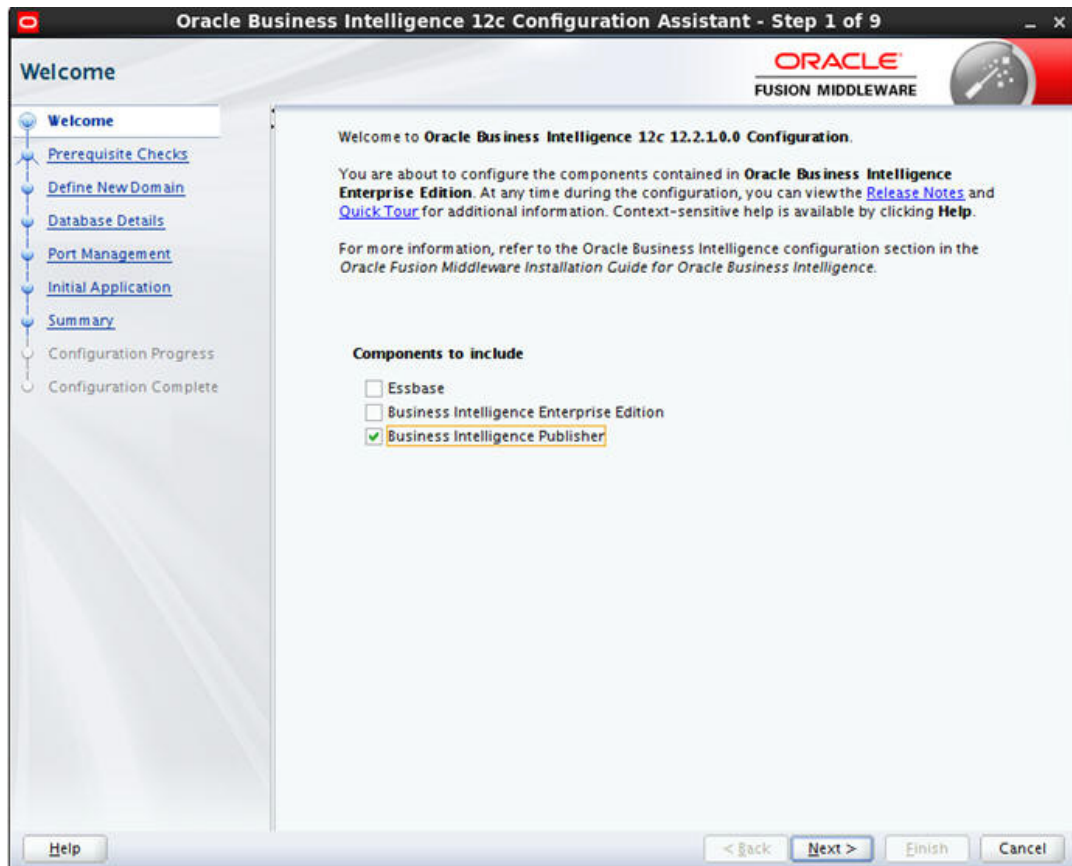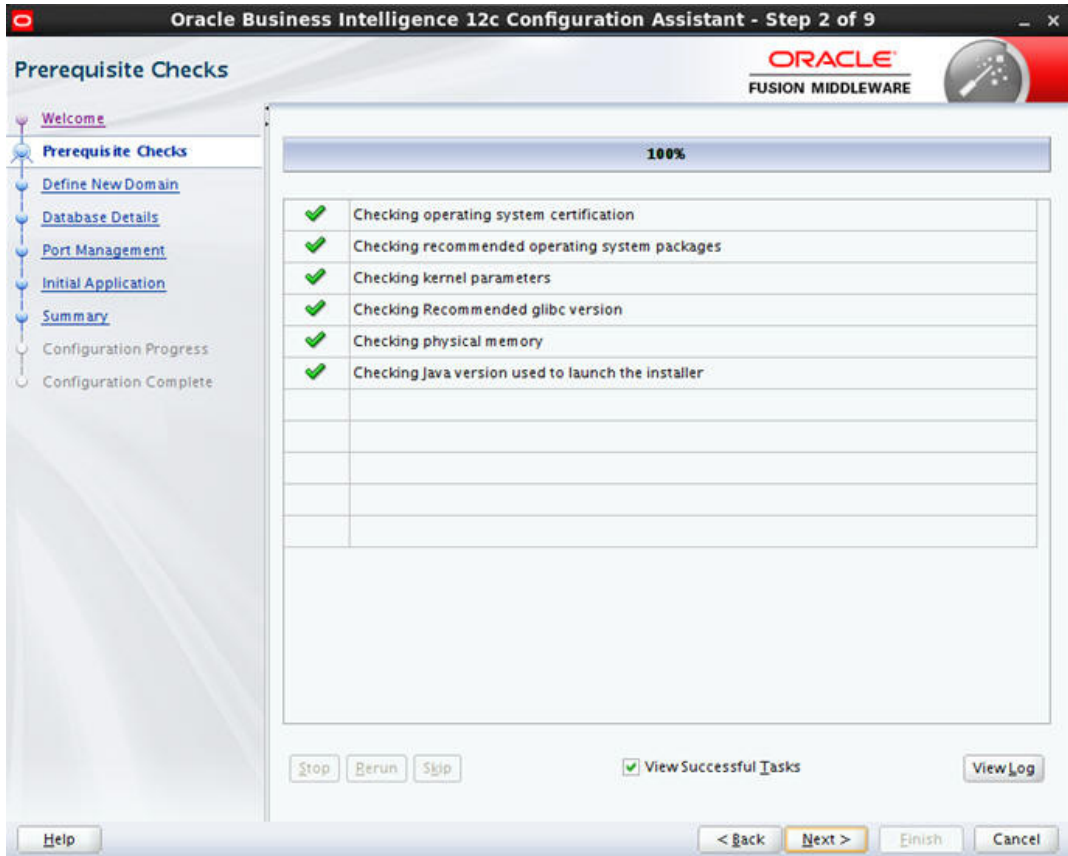
After installing BI Publisher, the next step is to configure BIP.

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.

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

4. Click 'Next'. The following window is displayed.
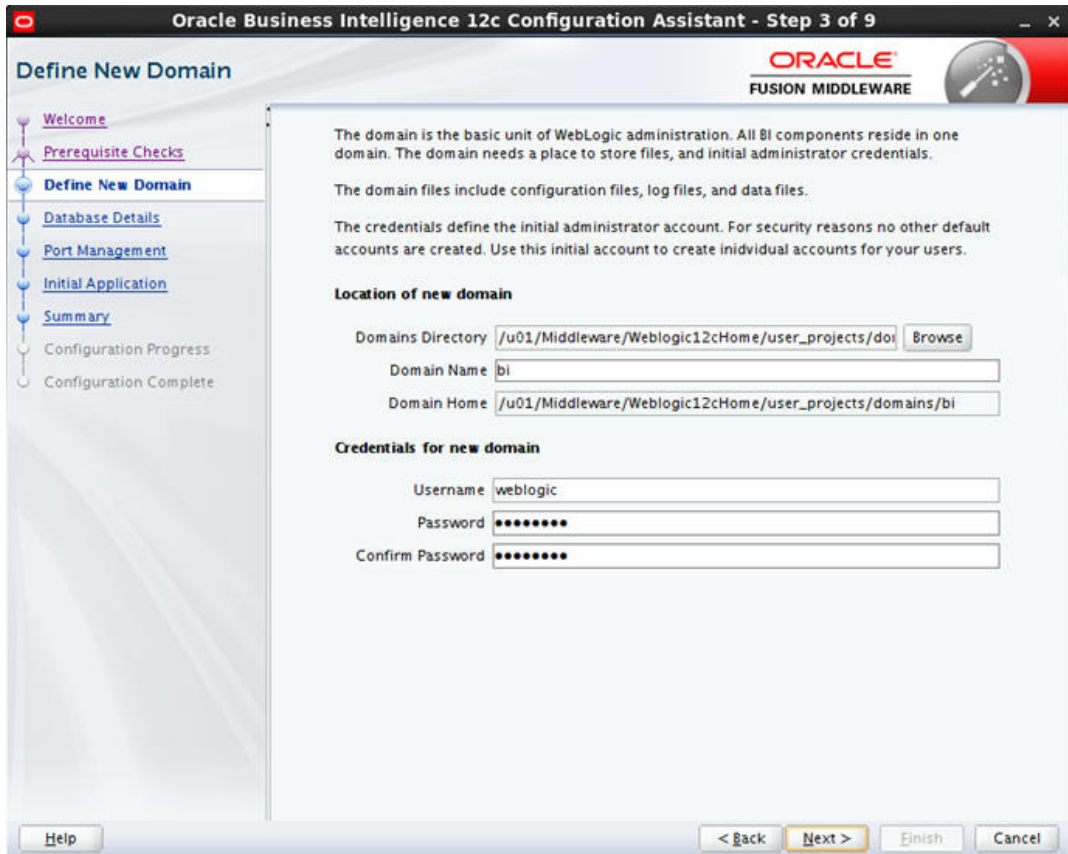
5. Enter the User Name, Password and Domain Name for BI Publisher domain. Click 'Next'. The following window is displayed.
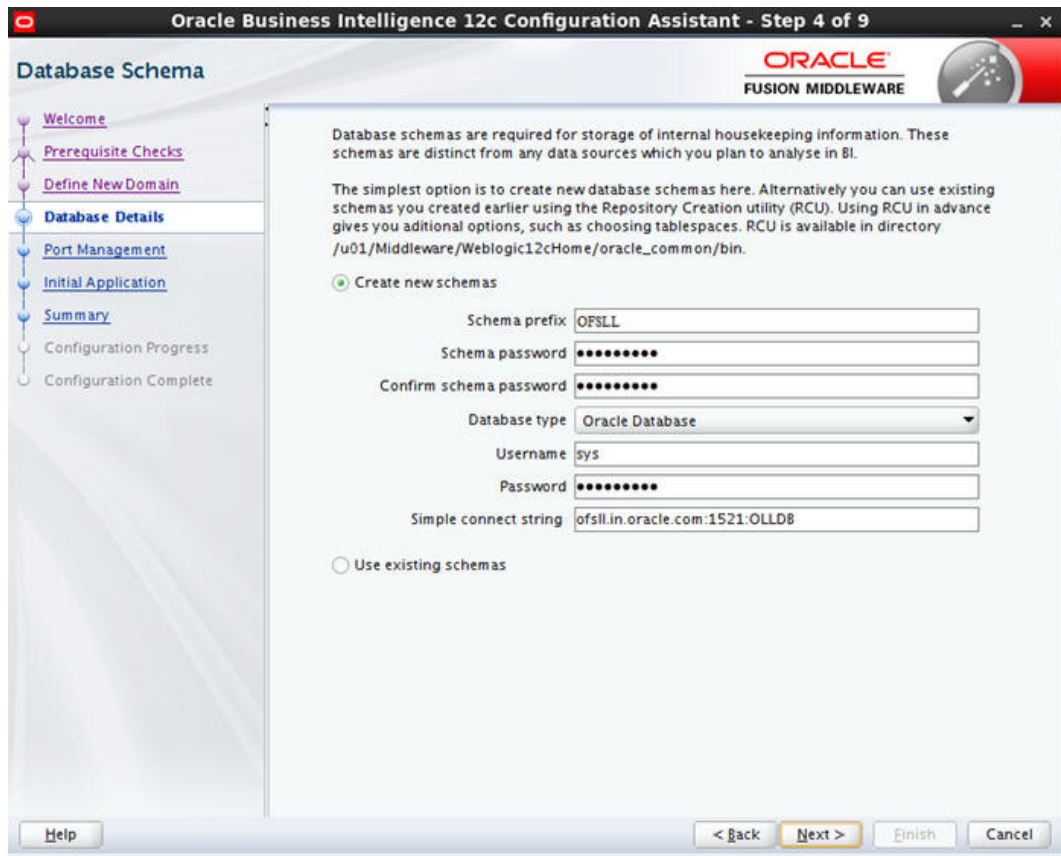
6. Select the option 'Create New Schema' and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.

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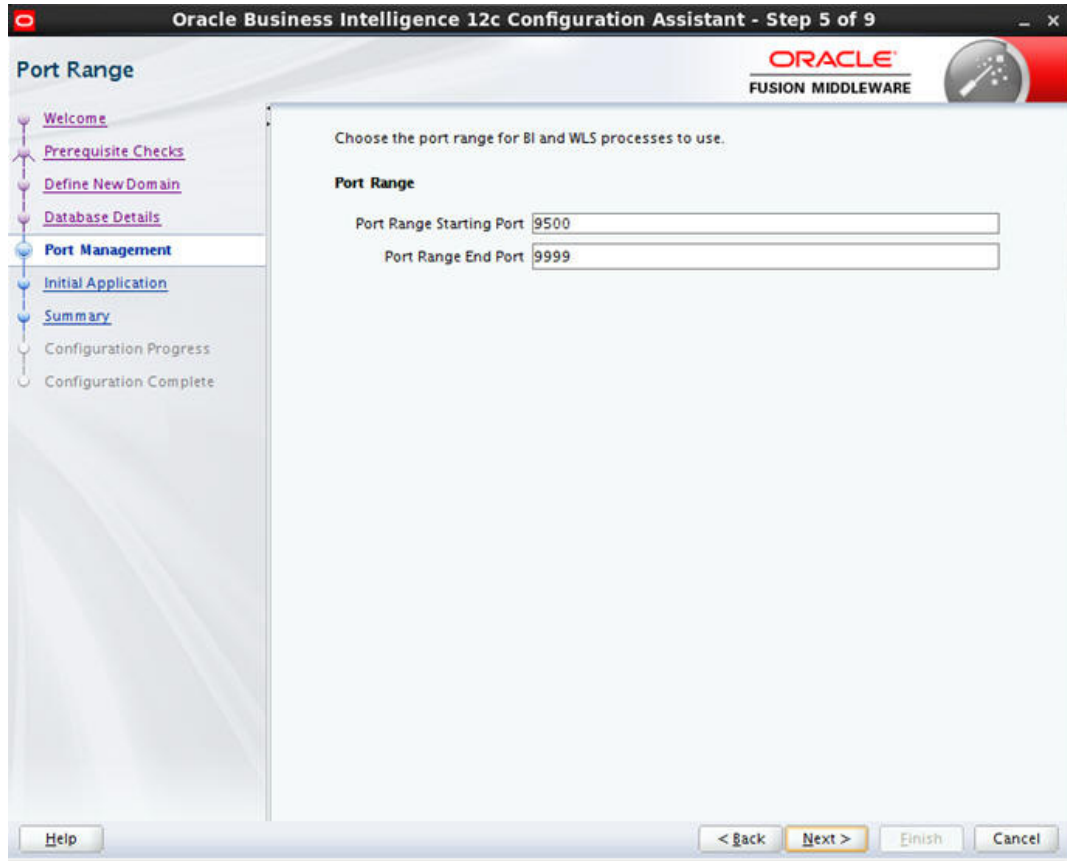
8. Click 'Next'. The following window is displayed.

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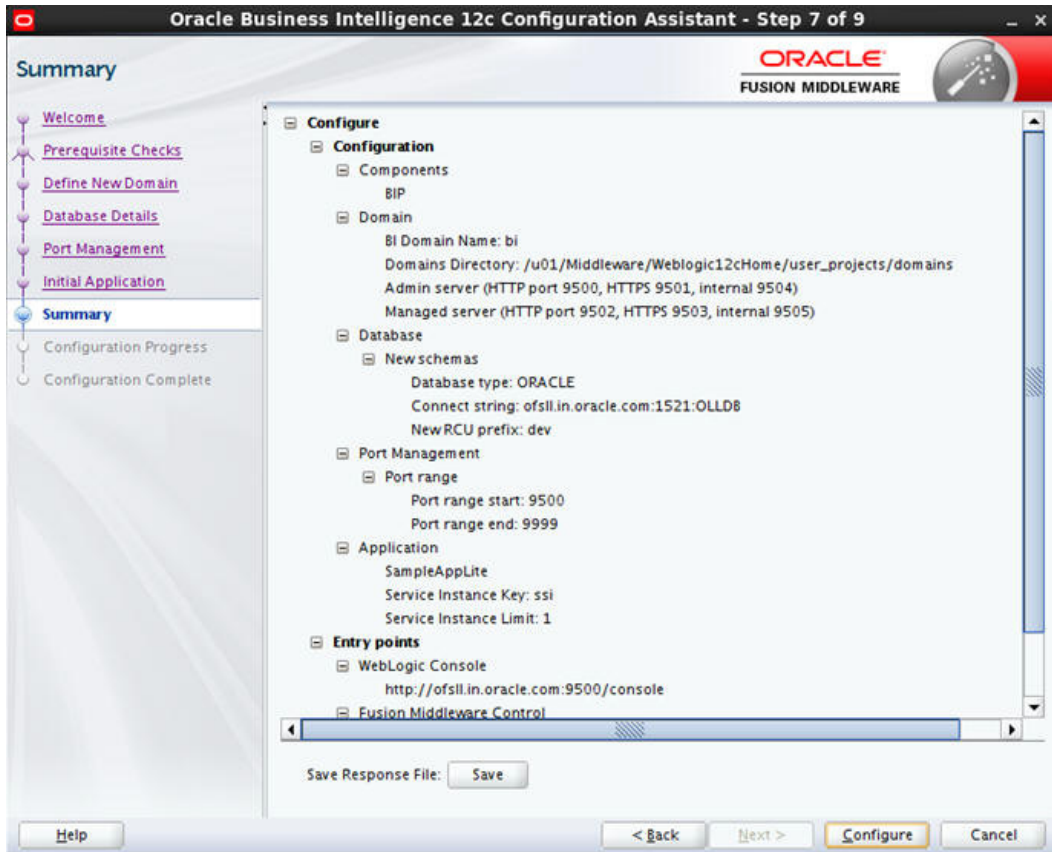
10. Click 'Configure'. The following window is displayed.

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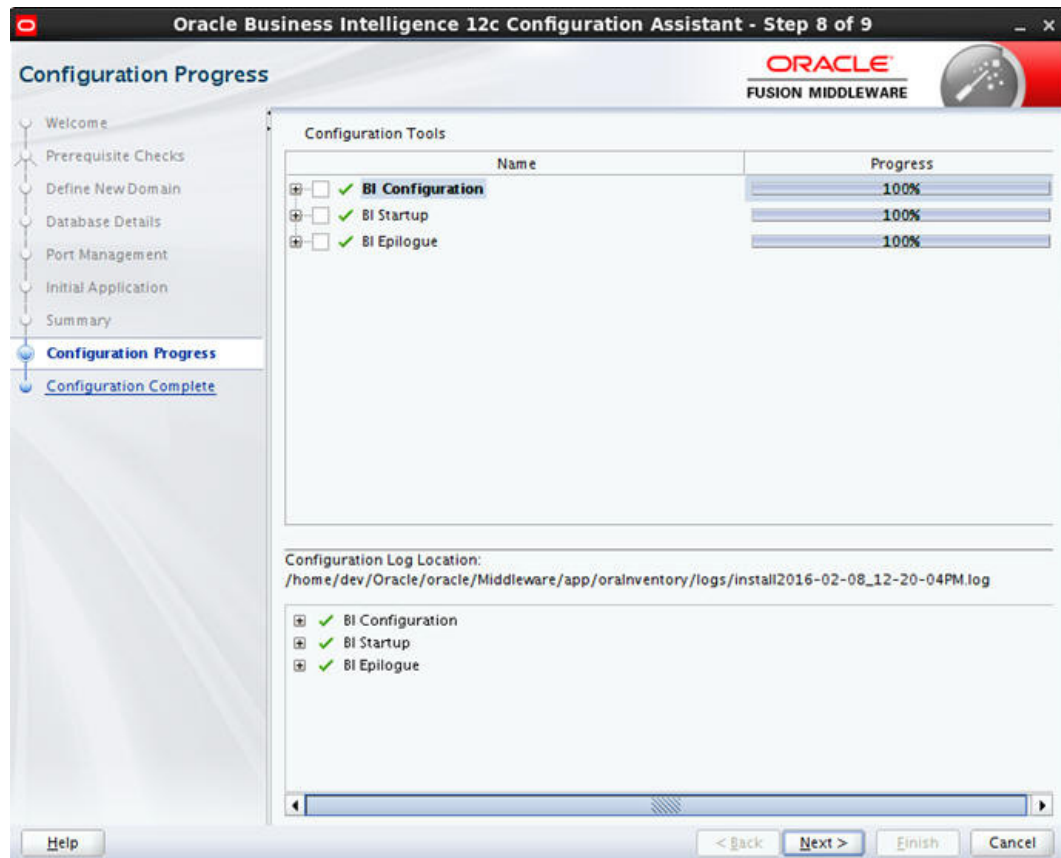
11. Click 'Next'. The following window is displayed
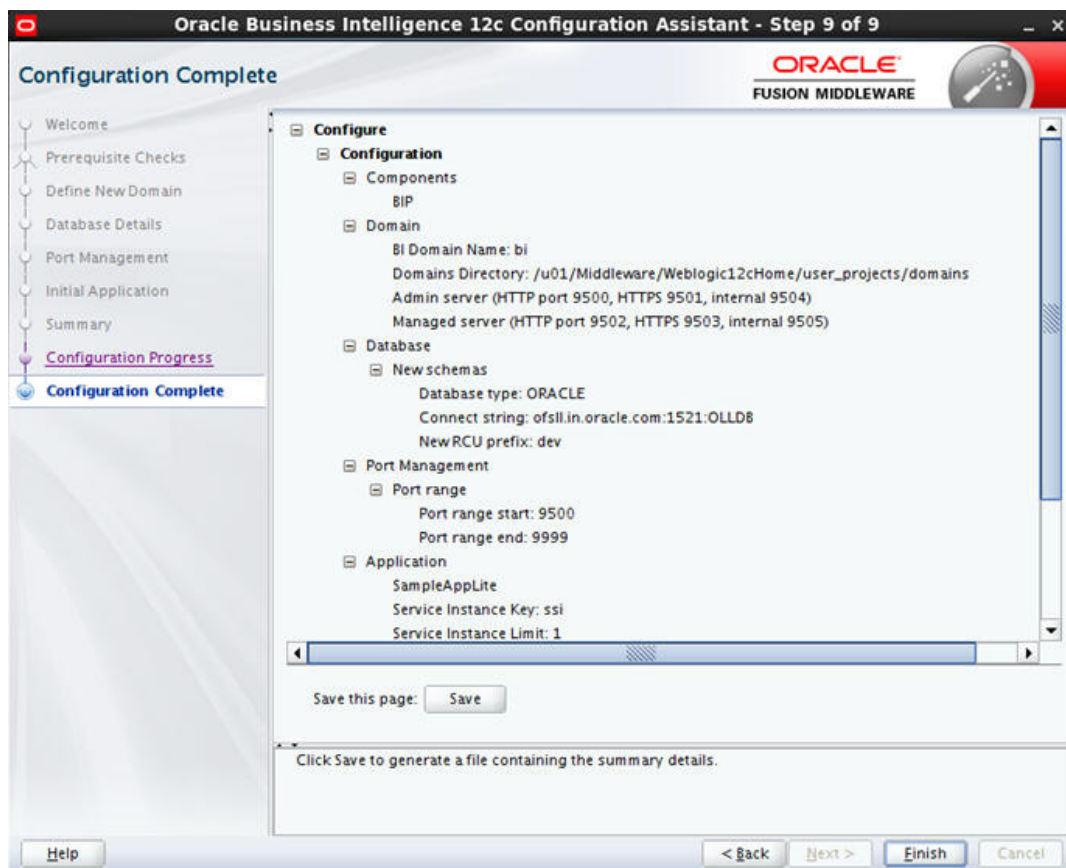
12. Click 'Save' and save the Response File.

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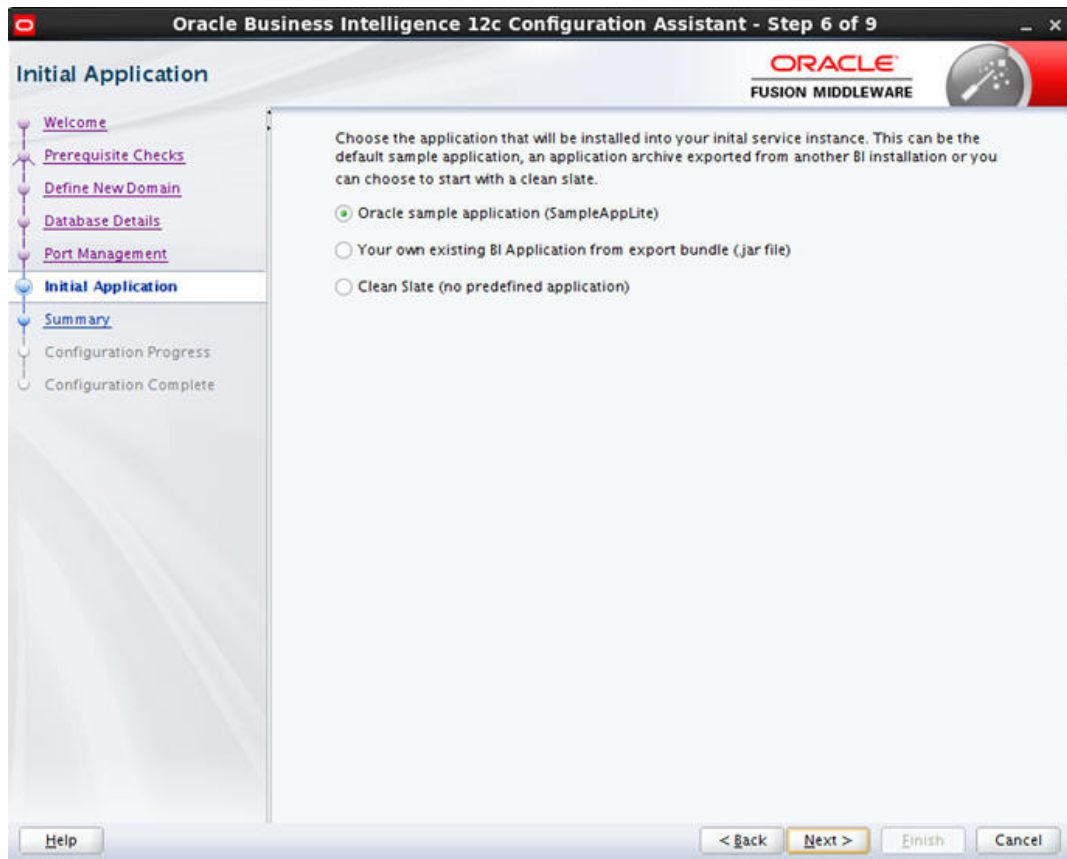
3.1   Verifying Successful BIP Deployment

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

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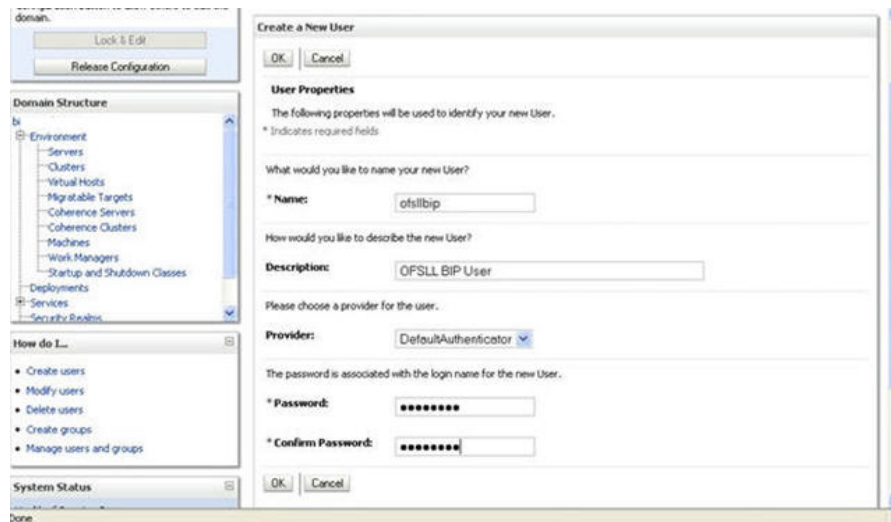
Field	Action
Name	Specify a valid name you need to maintain as User
Description	Provide description to the specified user
Provider	Select a provider for the user, from drop-down list.
Password	Specify a valid password you need to assign to the specified user.
Confirm Password	Retype the password to confirm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

5. Click 'OK'. The following window is displays the new User ID created.
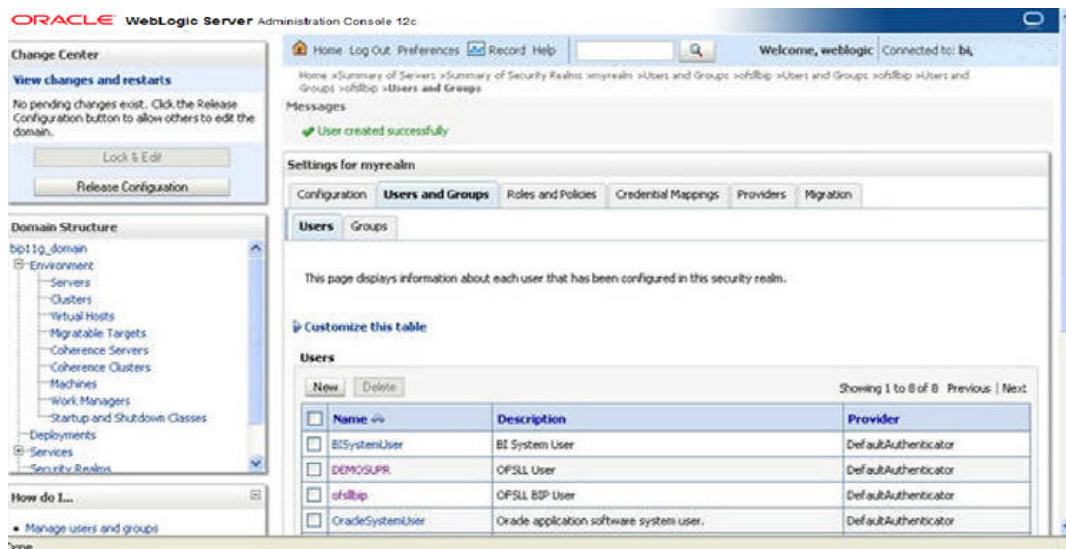
6. Select the check box adjacent to the 'User' created and click 'Groups' tab. The following window is displayed
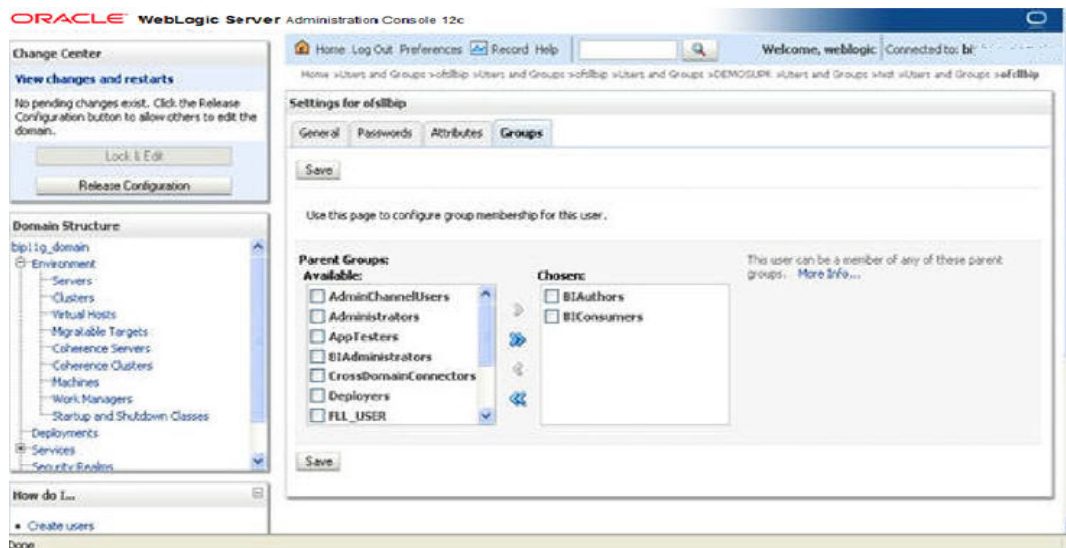
7. Select the following Groups from the 'Parent Groups Available' list and click '>' to assign it to the new user. You can also assign other groups as required.

    – BIAuthors

    – BIConsumers

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

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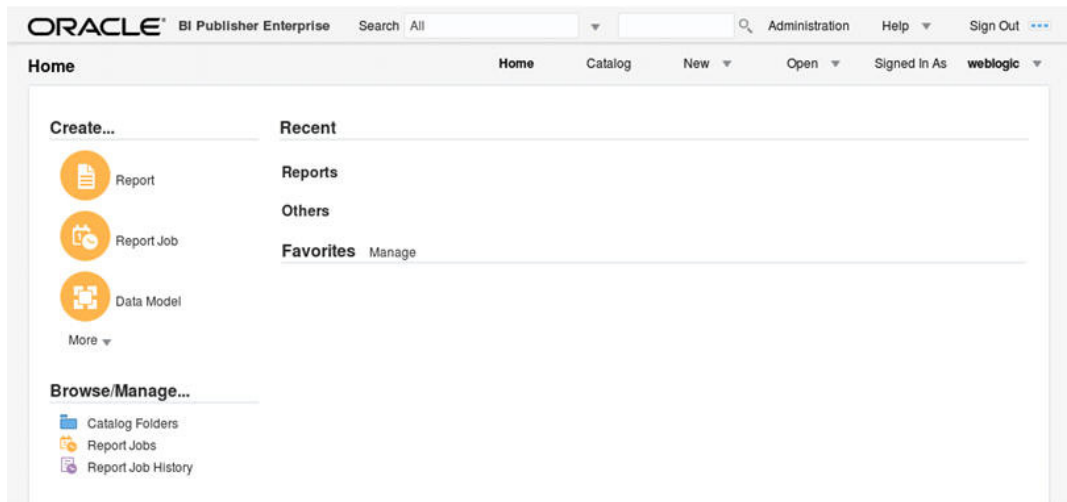
1. Access the weblogic console URL using http://hostname:port/console.

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

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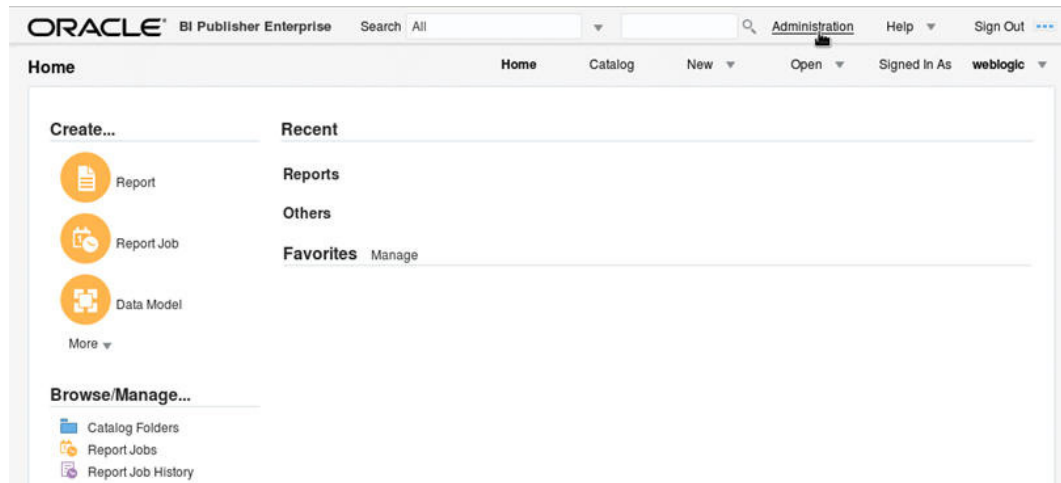
5. Click 'JNDI Connection'. The following window is displayed.

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

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7. 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.
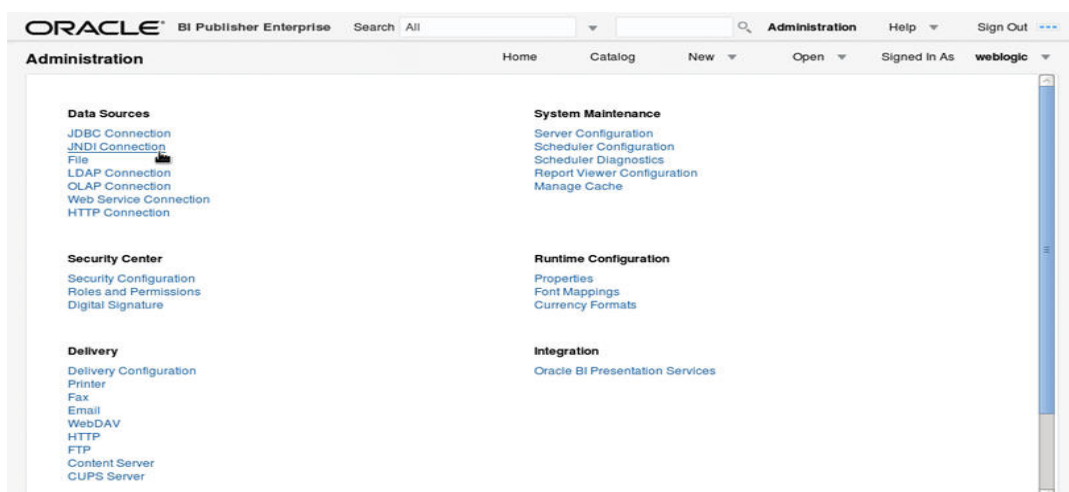
5.1 Creating Roles

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

1. Login to Enterprise Manager using the URL - http://hostname:port/em.

2. Select Weblogic Domain > Security > Application Roles as indicated in the following screen.
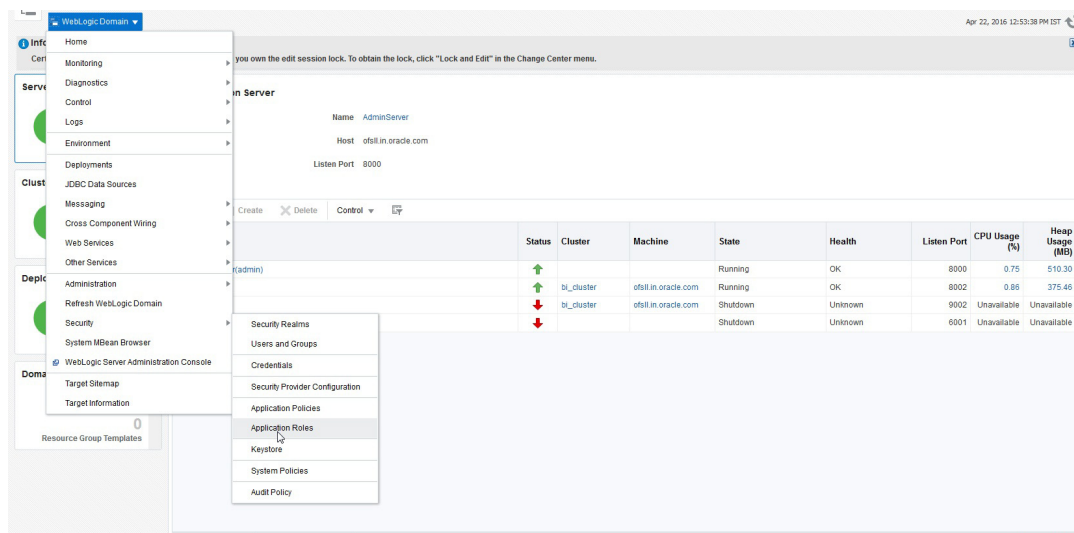
3. In the Application Stripe field, select 'obi' from the drop-down list. The option 'BIServiceAdministrator' is added by default. Click 'Create'.
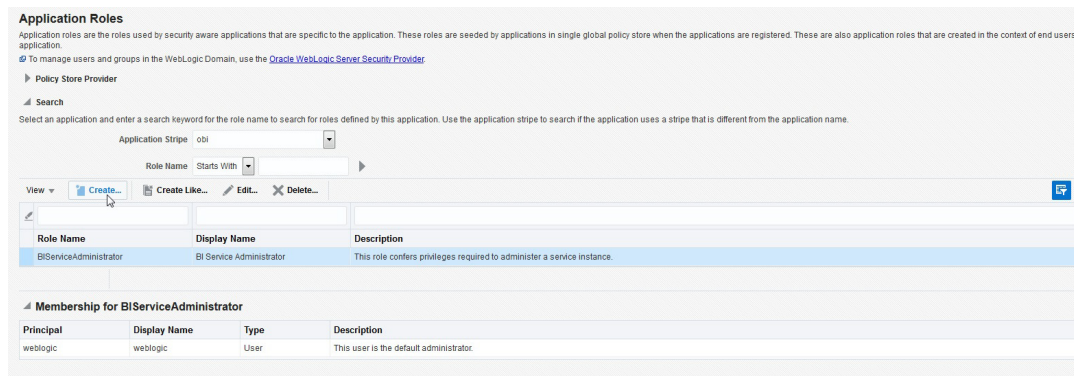
4. Specify the following details:

– Role Name

– Display Name

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– Description

5. 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.

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

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

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'.

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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...

View ▾   ➕ Add   ✕ Delete...   Detach

Name	Display Name
No users or groups 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

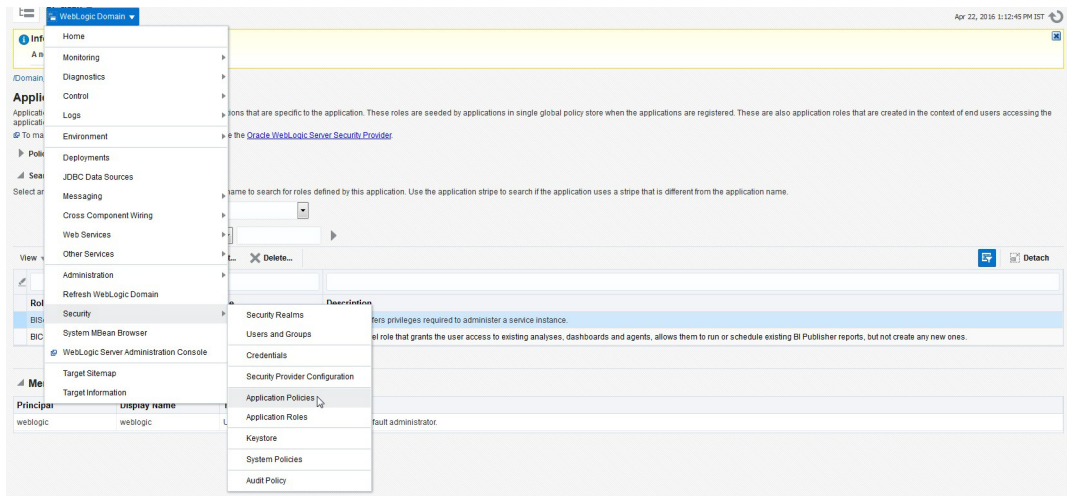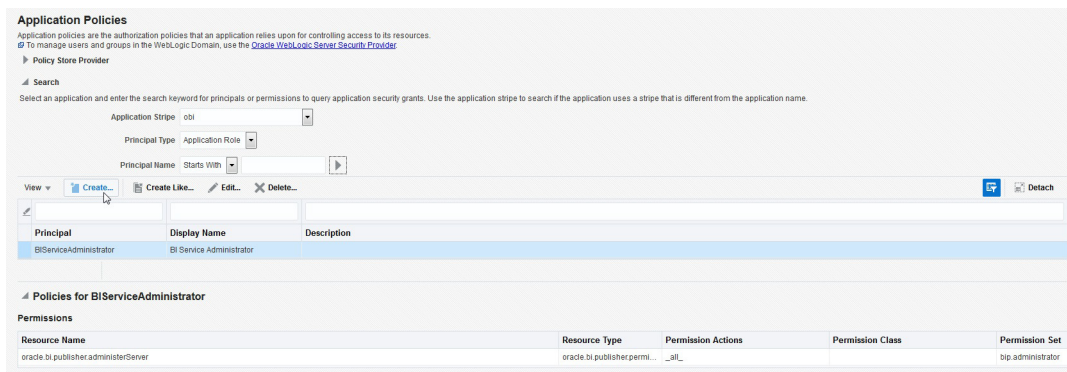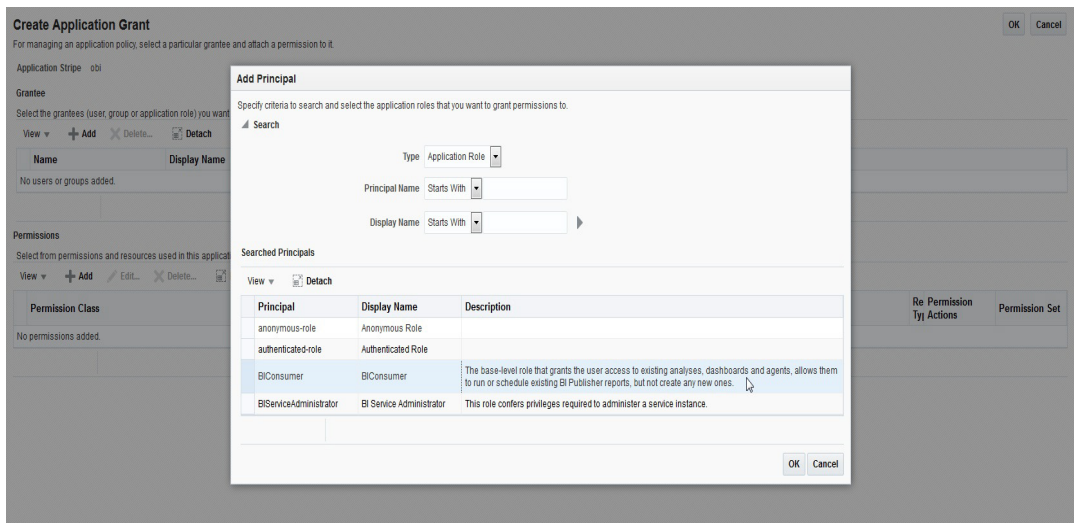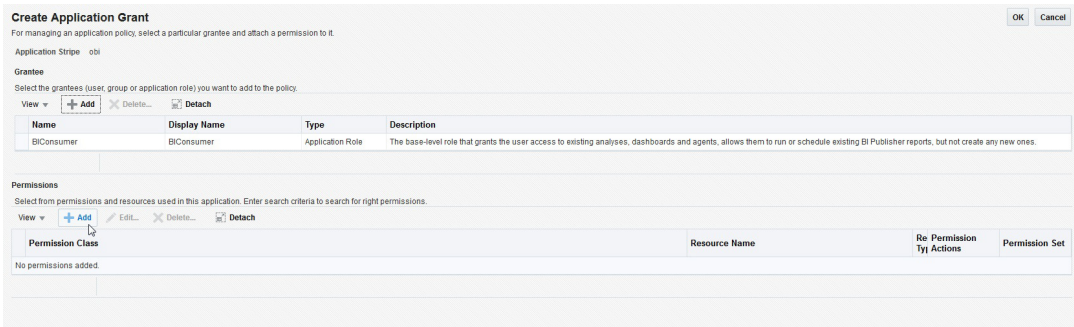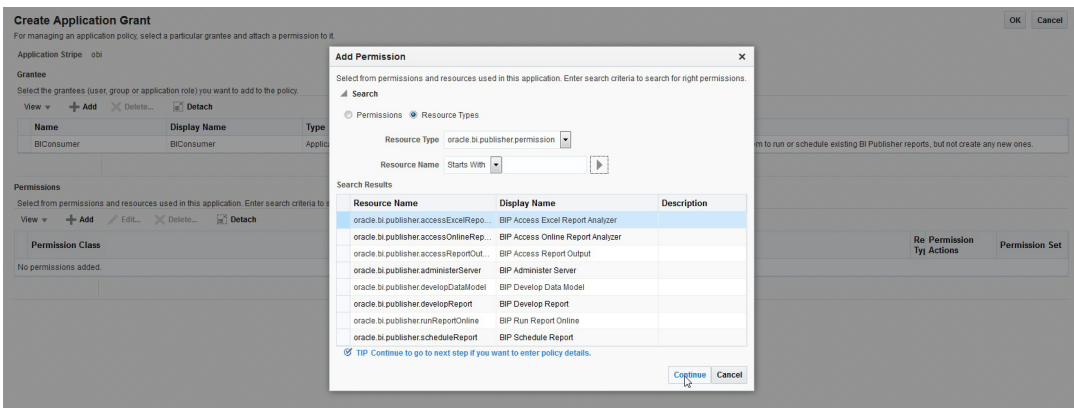| Principal	Display Name	Description
anonymous-role	Anonymous Role	
authenticated-role	Authenticated Role	
BIConsumer	BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any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

OK   Cancel

Permissions

Select from permissions and resources used in this applicat...

View ▾   ➕ Add   Edit...   ✕ Delete...

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

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

Create Application Grant   OK   Cancel

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 dropdown list. Select the required resource from the search results and click 'Continue'.

Create Application Grant   OK   Cancel

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

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

Permissions

Select from permissions and resources used in this application. Enter search criteria to s...

View ▾   ➕ Add   Edit...   ✕ Delete...   Detach

| Permission Class			Re Permission Ty Actions	Permission Set
No permissions added.				

8. Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click 'Select'.
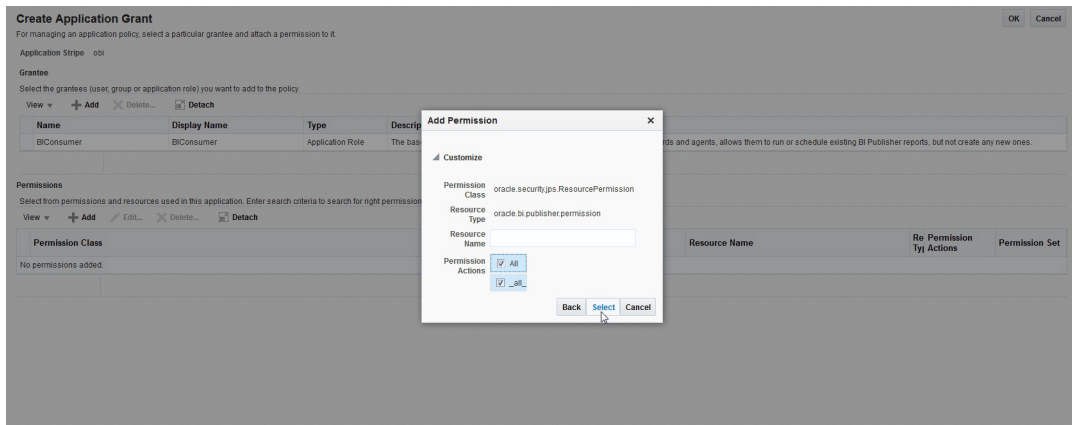
9. The selected permissions are defined to the application role. Similarly you can define the required permissions for other application roles.
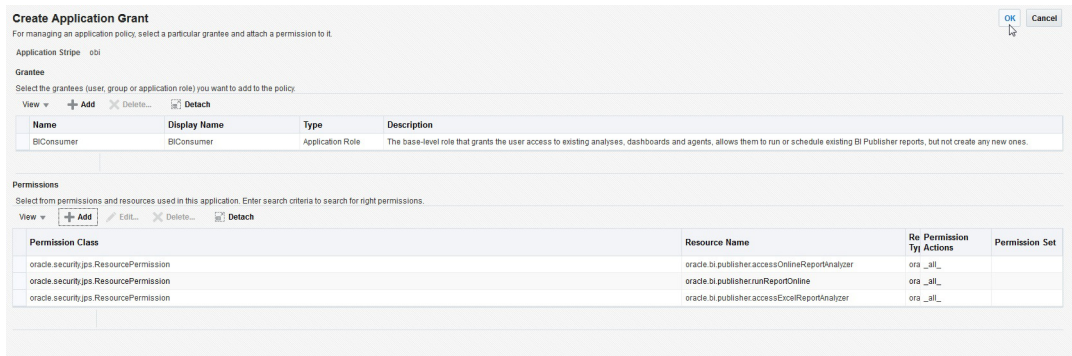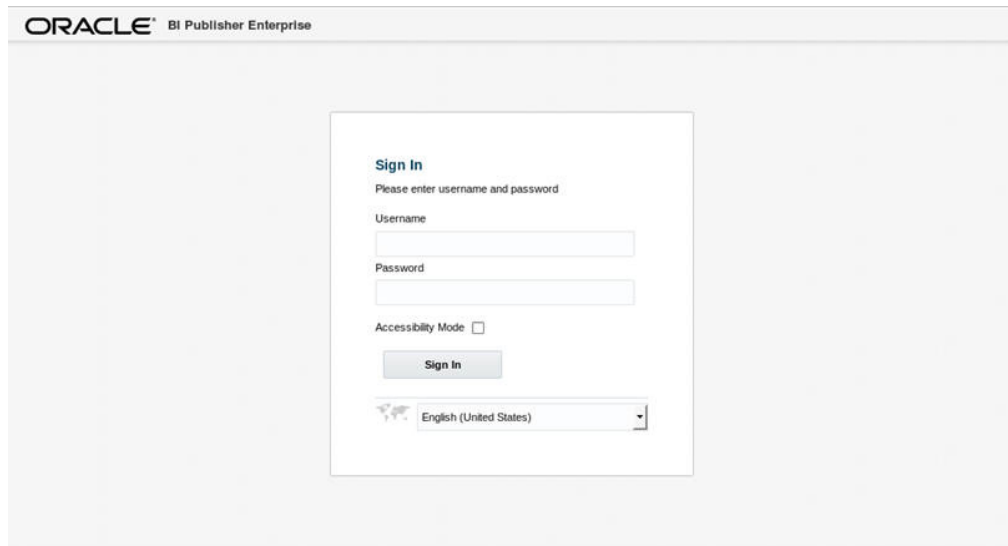

10. Once done, click 'OK'.
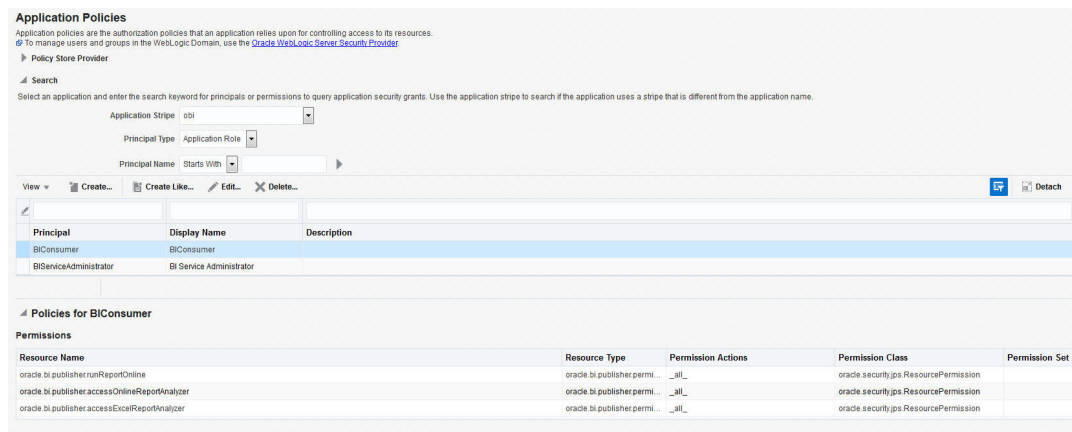
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6. Importing Reports to BI Publisher Server

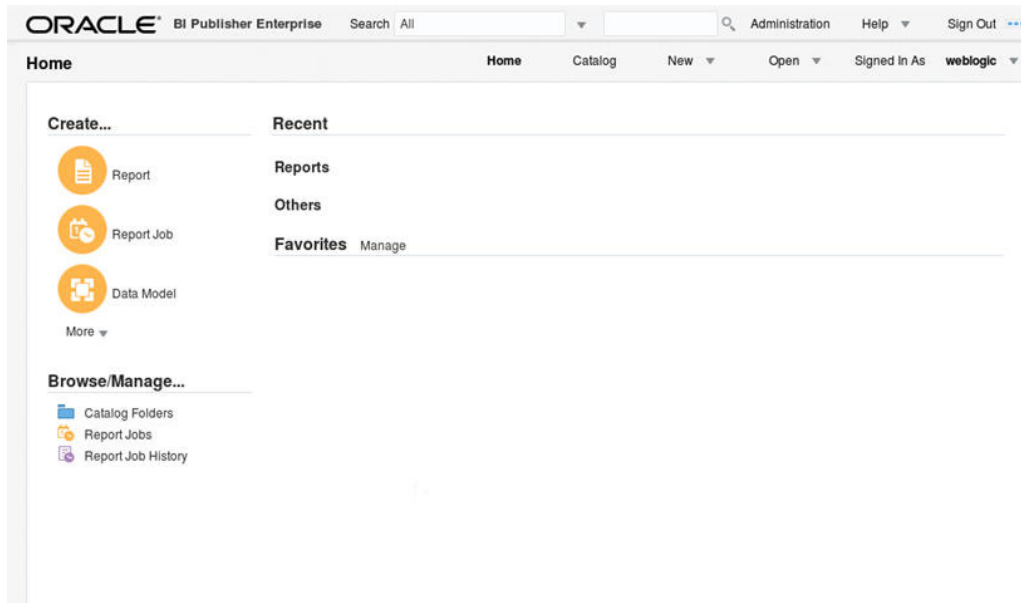To import reports to BI Publisher Server, do the following:

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.

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

5. Click on 'Shared Folders' option and then click 'Upload'.
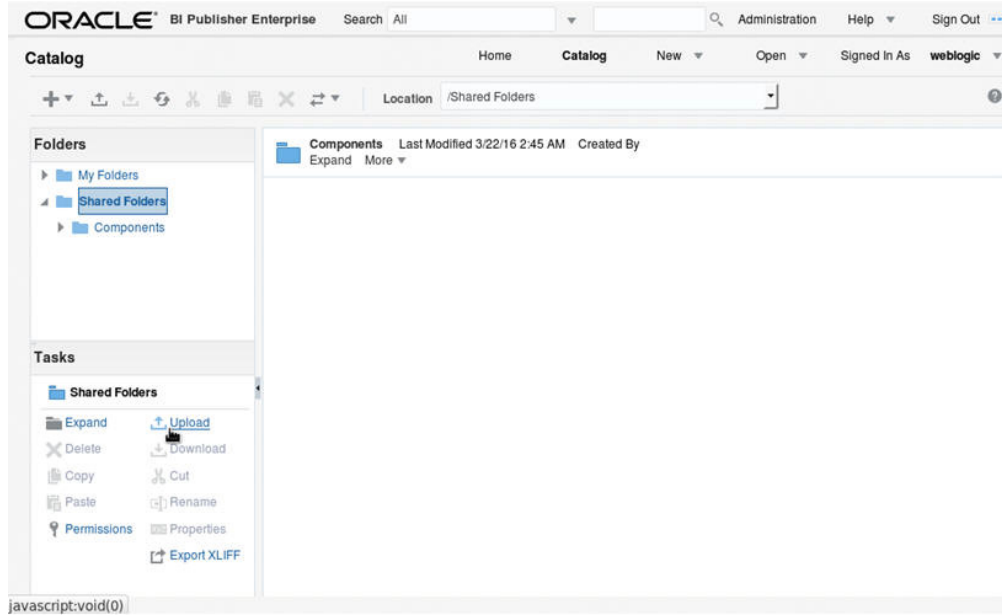
6. The following window is displayed. Browse to the location where the oracle.xdrz file is saved. Click the 'Overwrite Existing File' check box if you are overwriting an existing directory.

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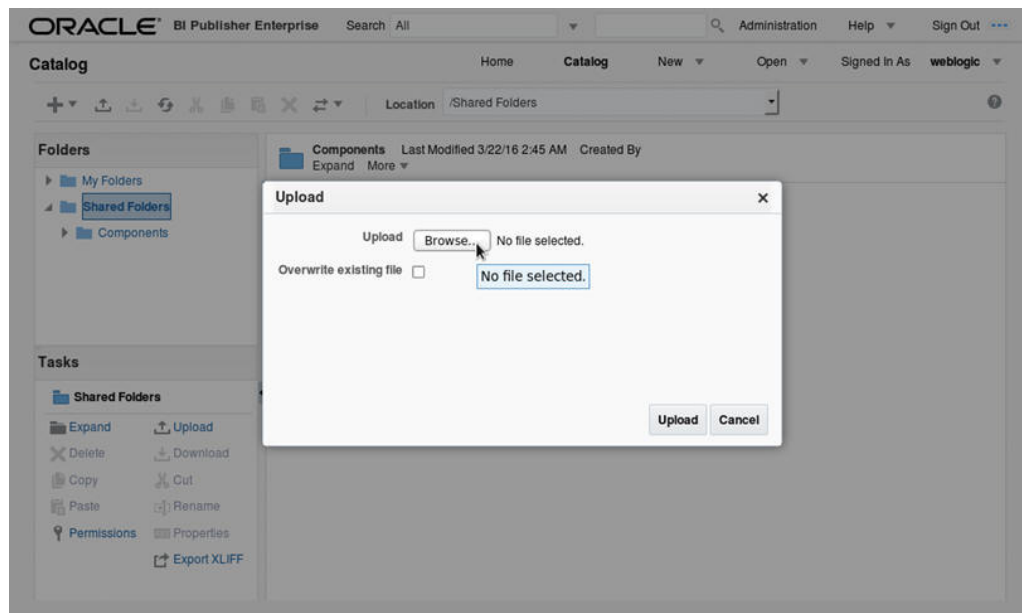
7. Click on 'Upload'.
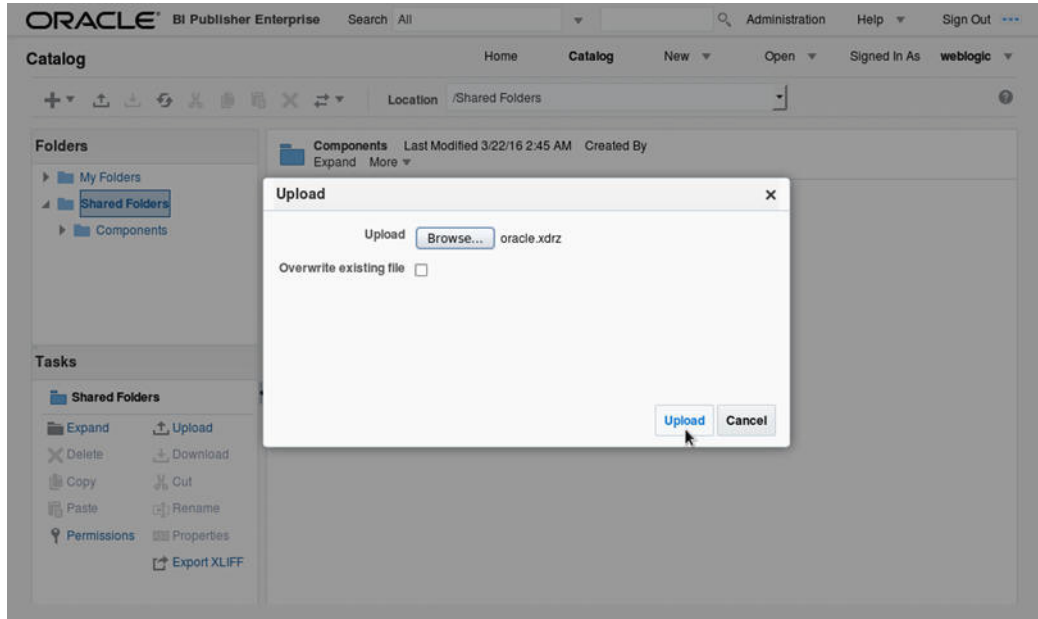
8. The following window is displayed.

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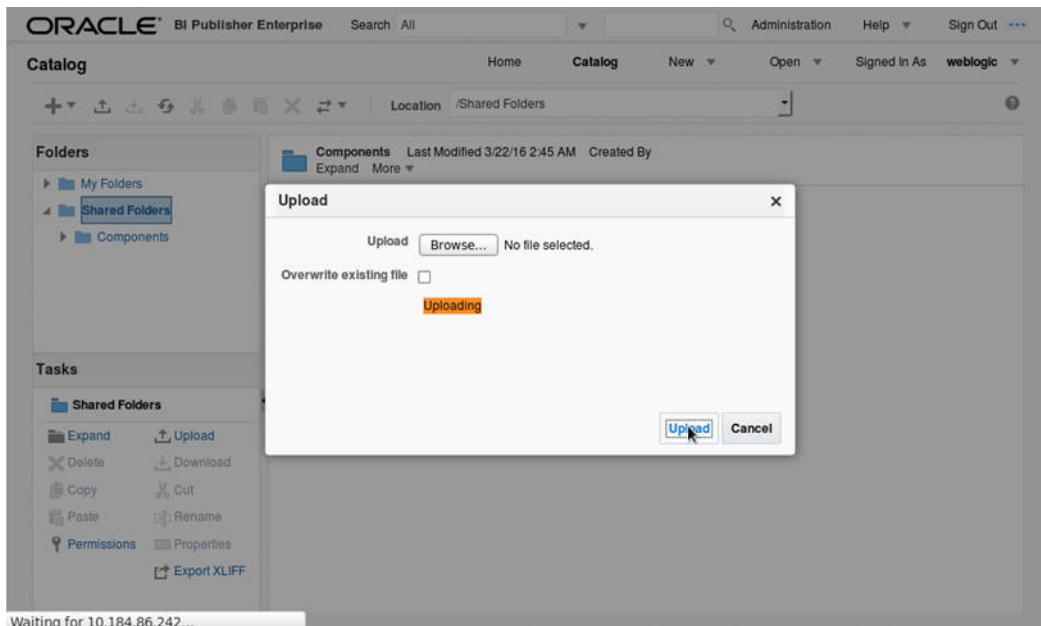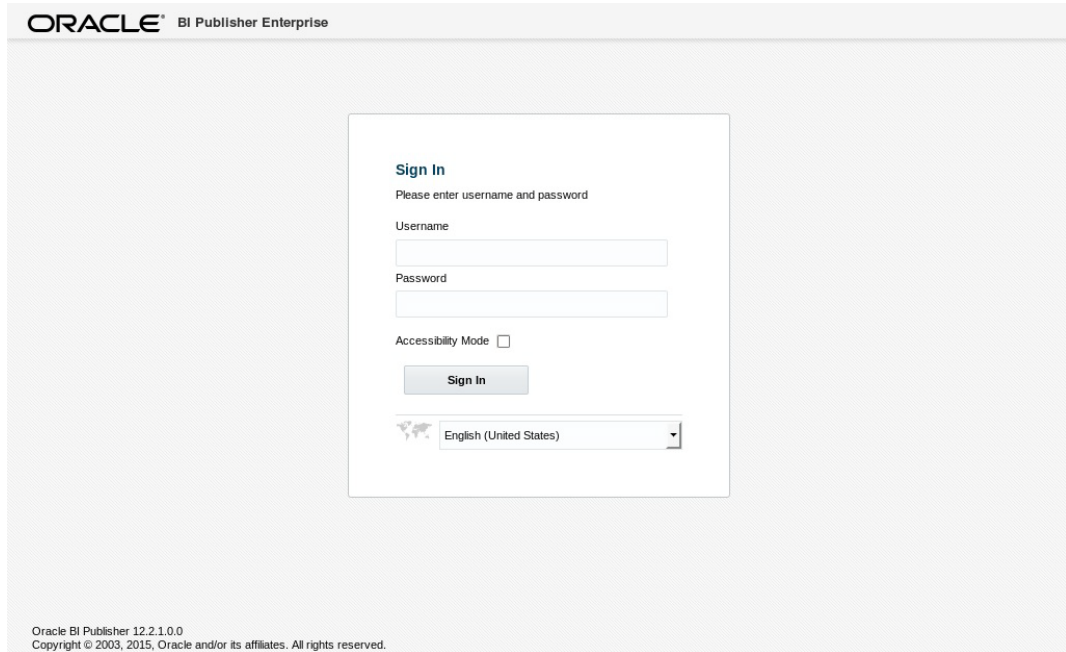
9. Once the upload is completed, click any folder to see the list of reports under the directory. The following window is displayed.
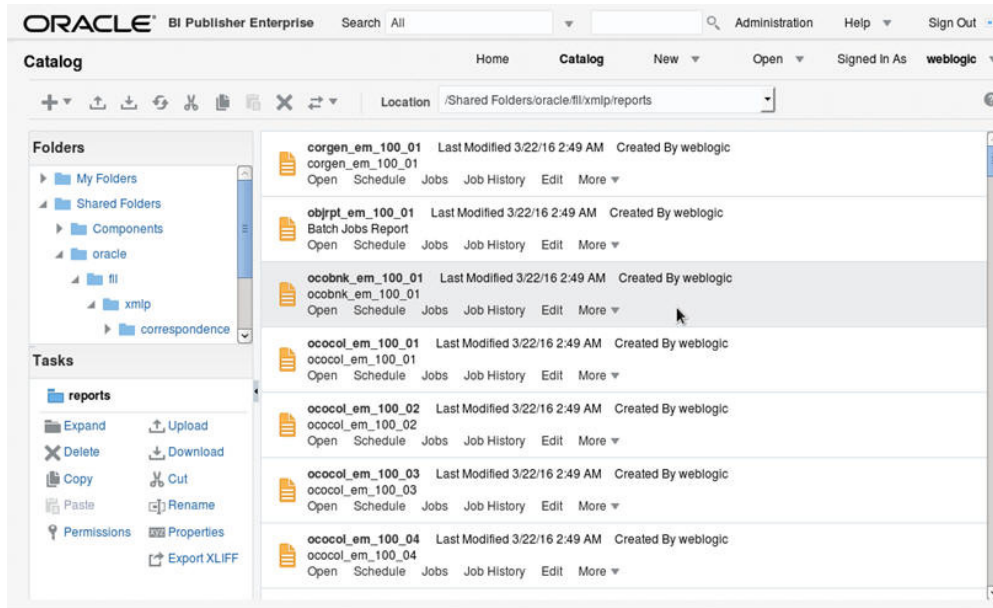
7. Configure MDB Mail Server

Refer to the following instructions to configure the MDB email server.
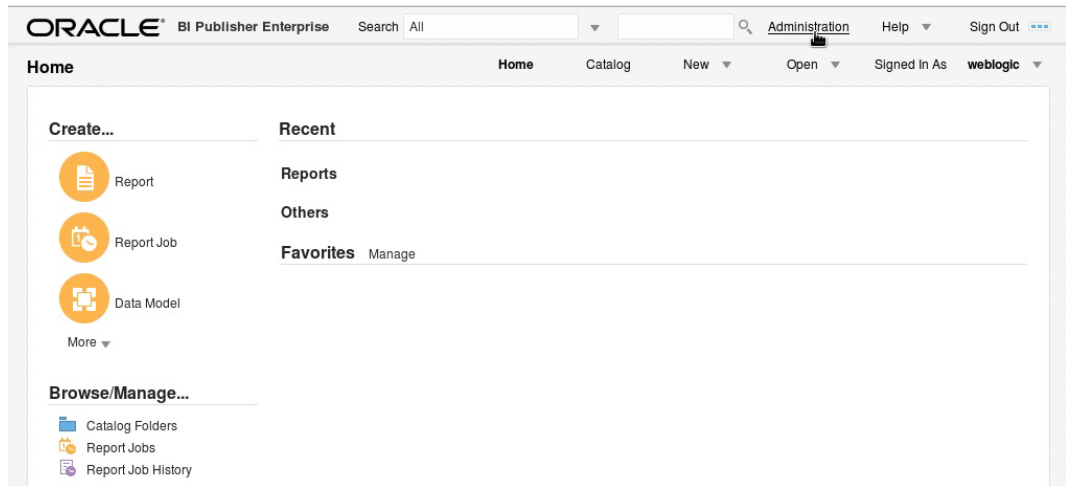
1. Launch the Oracle Business Intelligence (BI) Publisher application (http://hostname:port/ xmlpserver). The following window is displayed.

2. Login using the valid credentials. The following window is displayed.
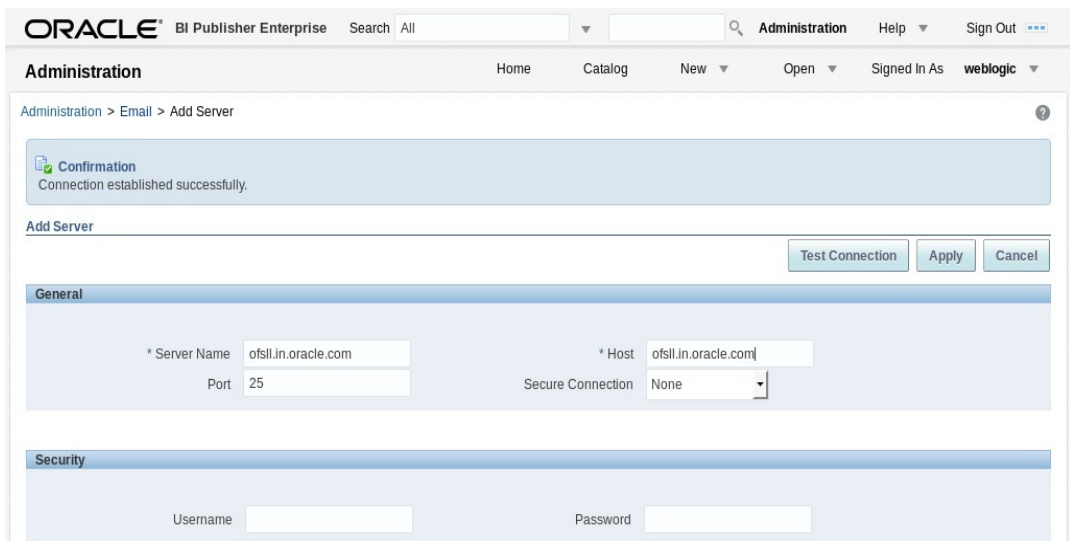
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3. Click 'Administration'. The following window is displayed.
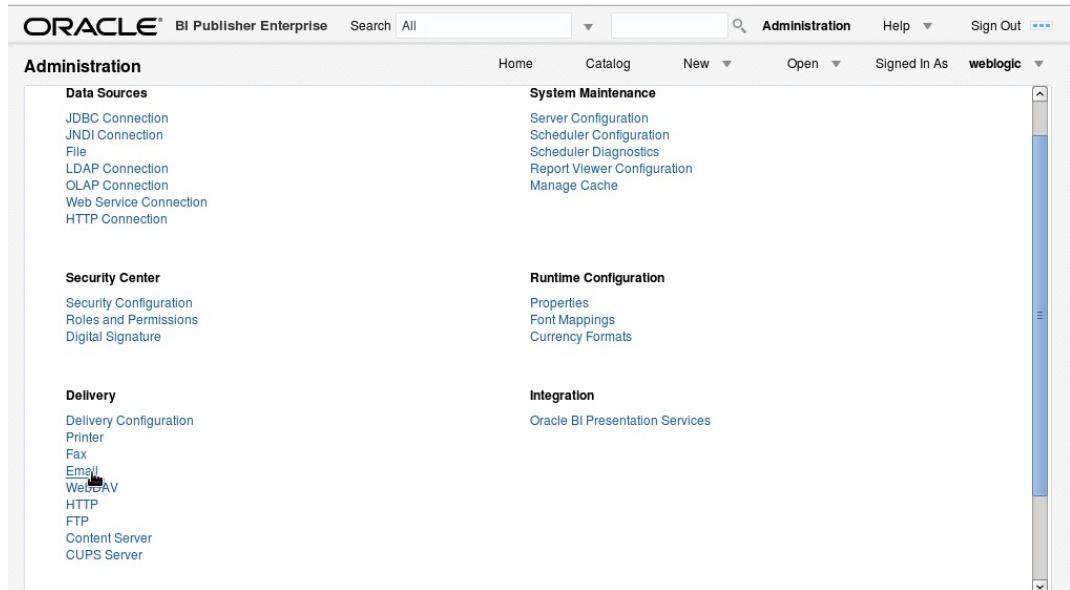
4. Click 'Email'. The following window is displayed.
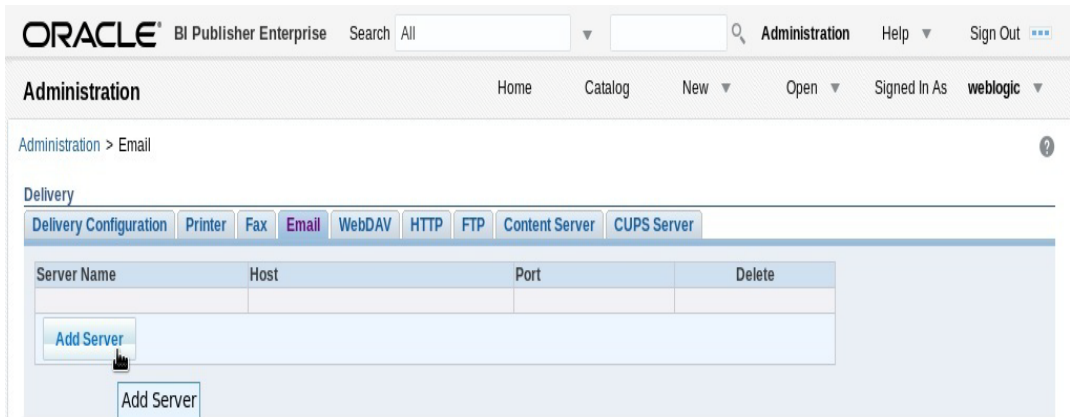
5. Click 'Add Server'. The following window is displayed.

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

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

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