Oracle Financial Services Institutional Performance Analytics

OBIEE Deployment Guide

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Financial Services

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OFS Institutional Performance Analytics OBIEE Deployment Guide

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Document Control

Version Number	Revision Date	Change Log
1.0	October 2020	Created the document with instructions for deploying the OFS IPA Report Analytics for the release 8.0.5.0.3.

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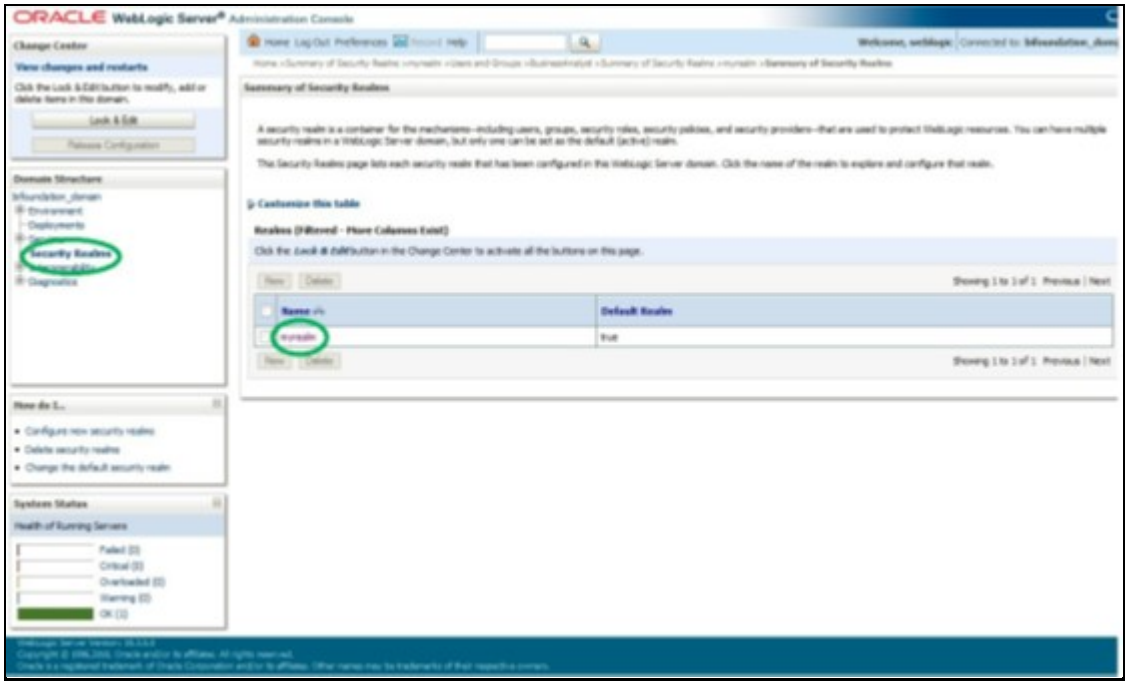
1 Data Visibility

This has been implemented with the set of tables and OBIEE roles. Roles Created in OBIEE is to restrict data based on Manager Hierarchy.

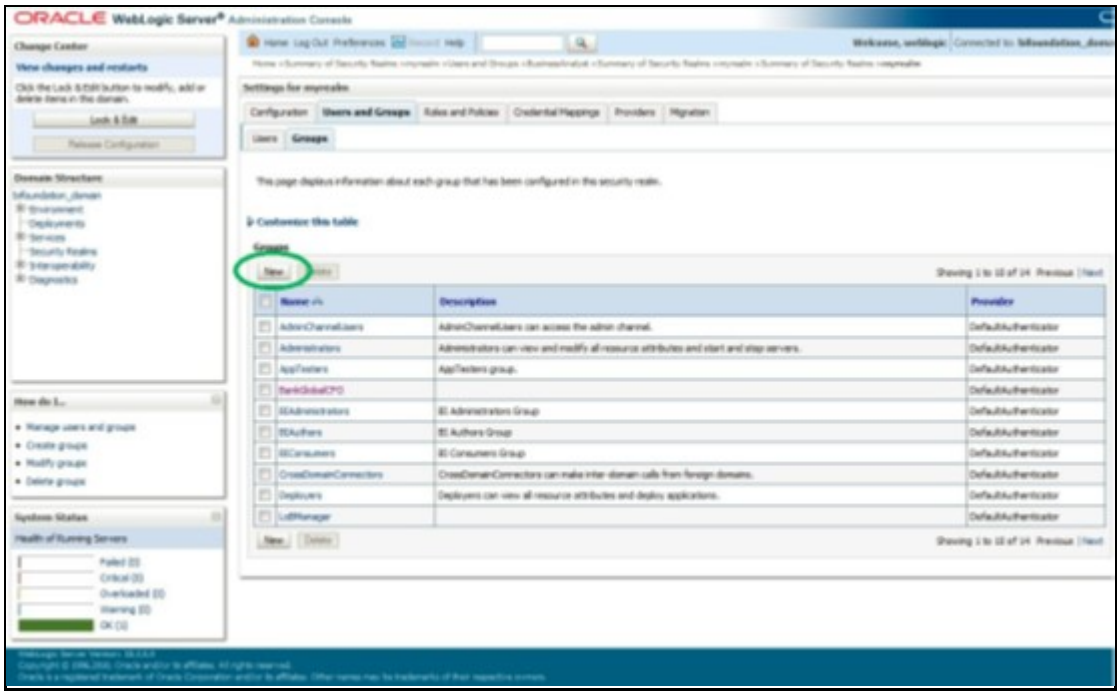
1.1 Creating OBIEE Roles

To accomplish these, follow these steps:

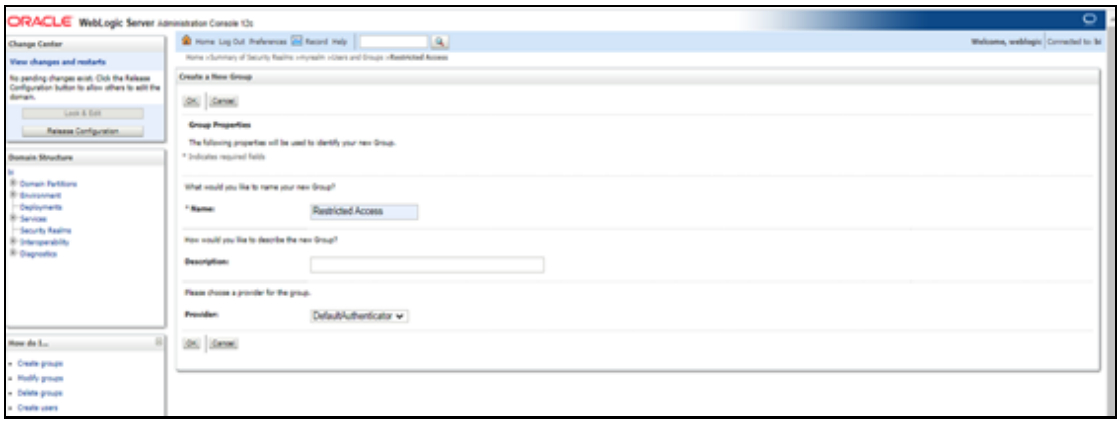
1. Open Admin Console of OBIEE.
2. Click on **Security Realms** under Domain Structure.
3. Click on **myrealm** under Realms.



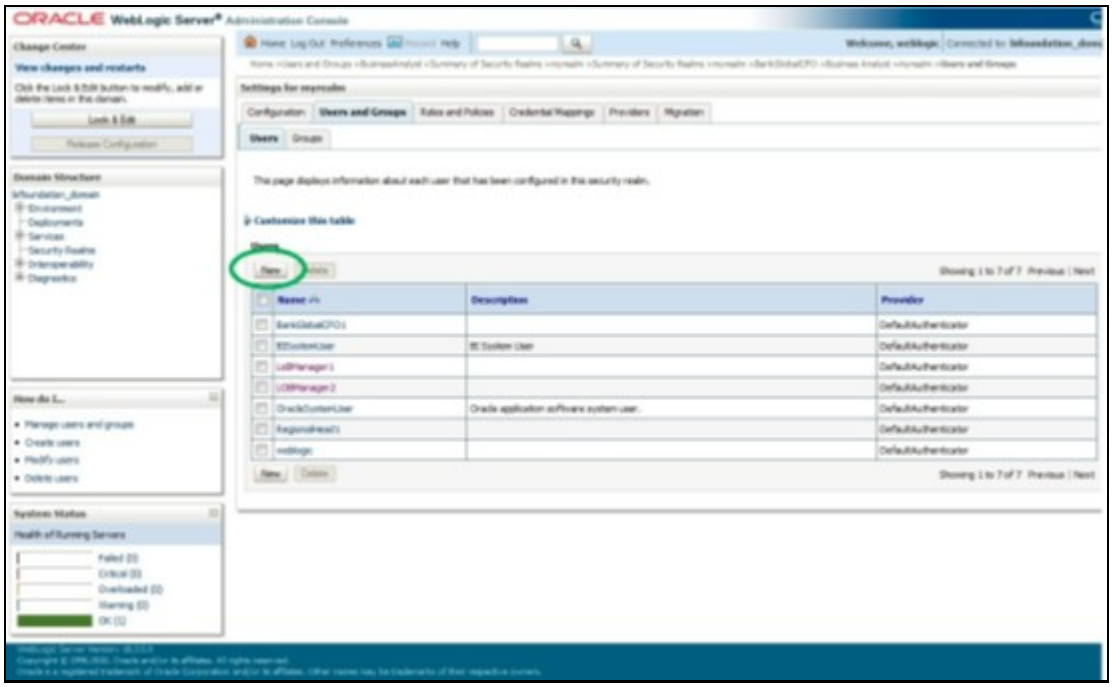
4. Click on **Groups** tab of **User and Groups**.



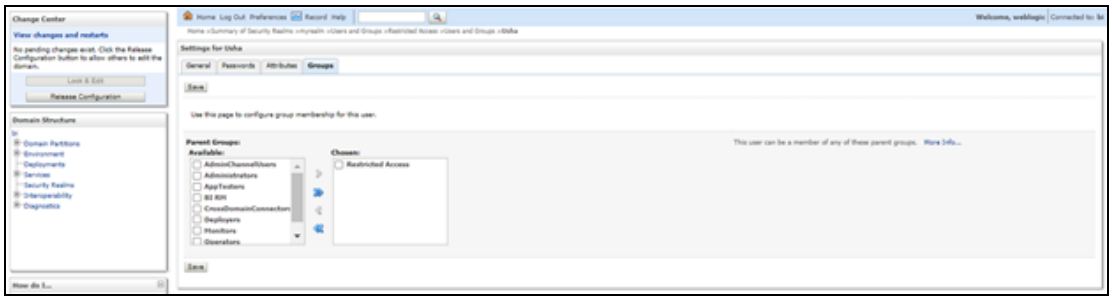
5. Click on **New** and create new user group as 'Restricted Access'.



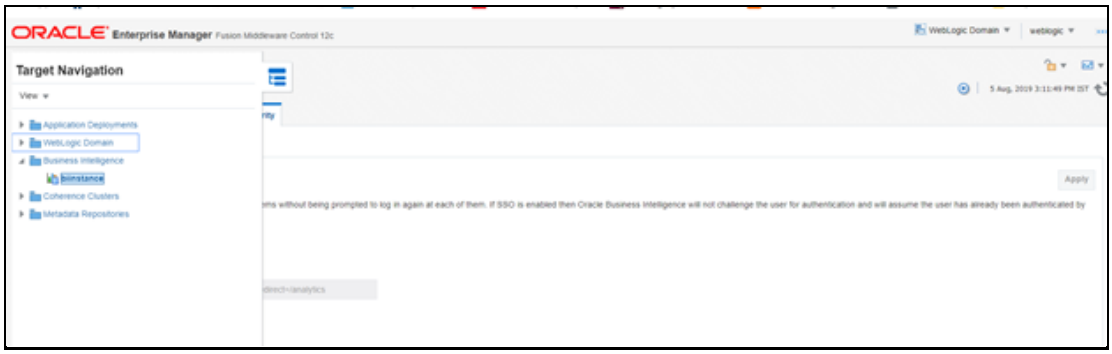
6. Create a new user under **Users** tab of **Users and Groups**.



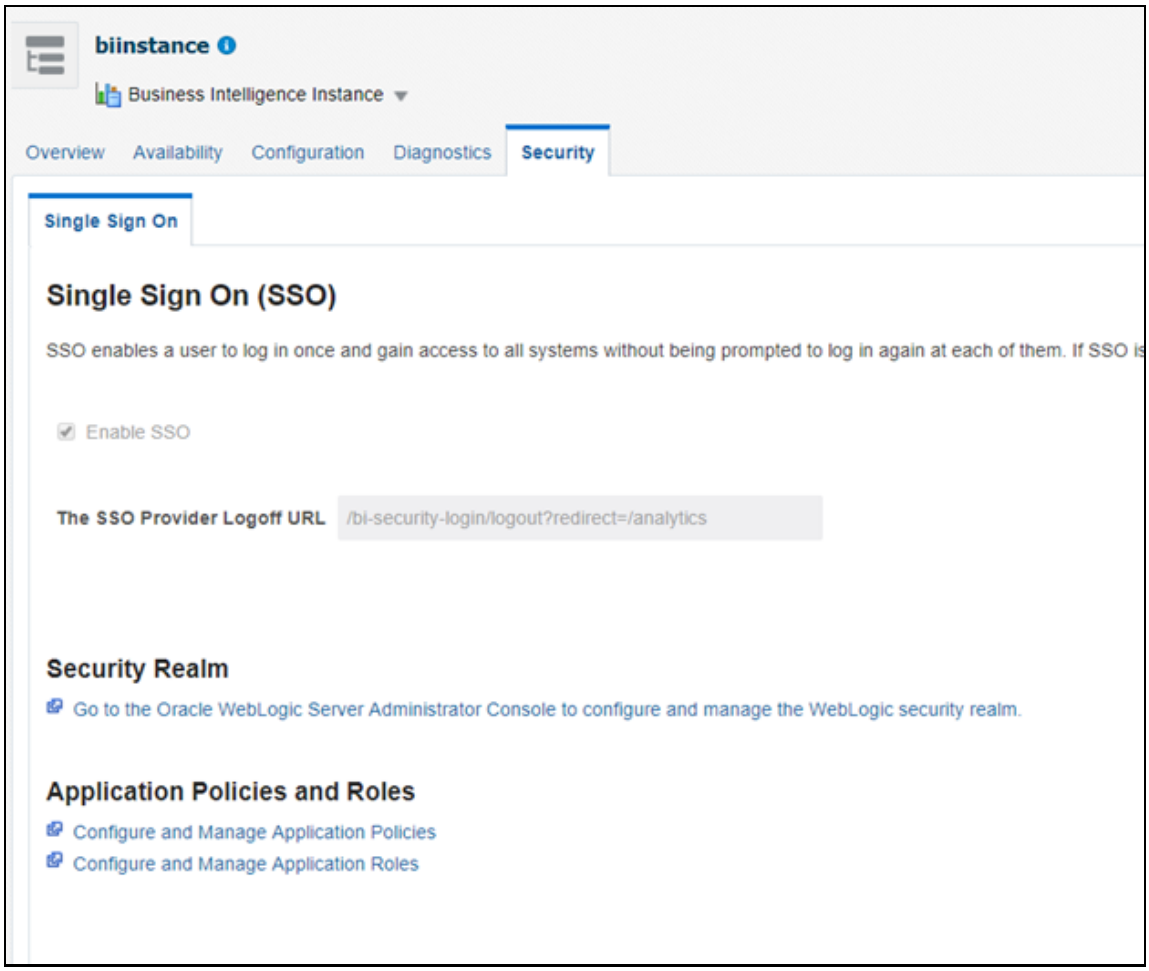
7. Map the newly created users to 'Restricted Access' group, which need Data Visibility.



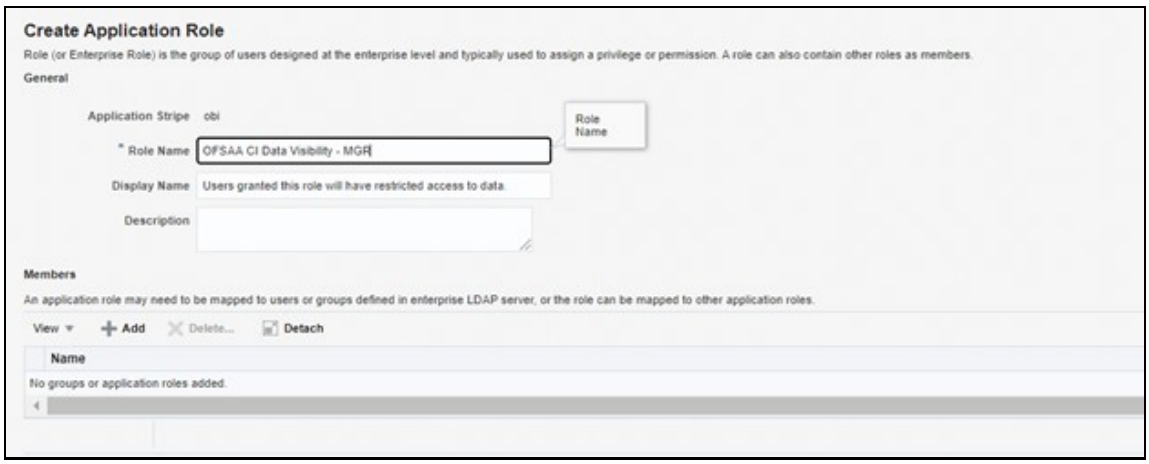
8. Close the Admin Console of OBIEE.
9. Open Enterprise Manager of OBIEE.
10. Click on **biinstance** under Business Intelligence.



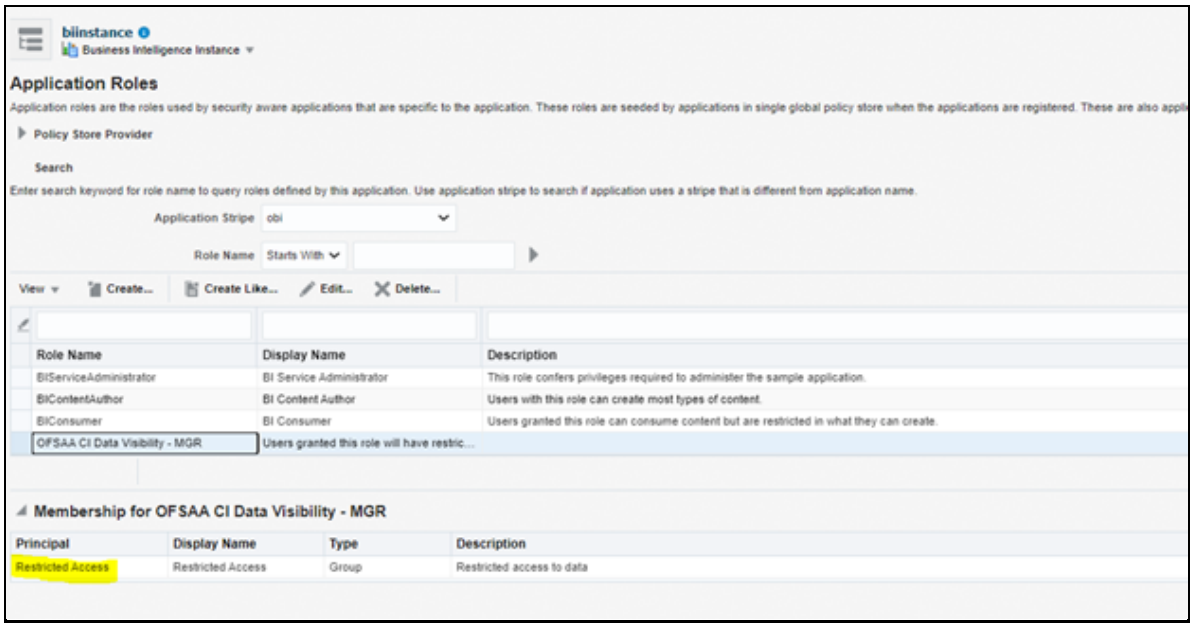
11. Click on **Security** under **biinstance**.



12. Click on **Configure and Manage Application Roles** to create Application Roles.
13. Click on **Create** and name as **OFSAA CI Data Visibility - MGR** role . Ensure to use the same name as it is referenced in RPD failed to do this should have access to all reports data.



14. Map the user group, which need data visibility to the **OFSAA CI Data Visibility – MGR**.



1.2 Data Population as per Visibility Changes

- **FSI_M_USER**: This table stores all the users that have access to OBIEE. The user id in this table must match the user's login id of OBIEE.
- **FSI_M_USER_MANAER_MAP**: This table needs only those users details who need Restricted Access. The V_USERNAME has to be inserted with the login username created in OBIEE. V_MANGER_CODE has to be inserted with the manager code of the corresponding user from DIM_MANAGEMENT table. V_USER_TYPE will always be updated as 'R' which denotes Restricted Access. Fail to update this table may end up with report errors.

> **NOTE** Users insertion in FSI_M_USER and FSI_M_USER_MANAGER_MAP has to be done directly into the table. For example, in presence of Single Signon System, these tables need to be loaded with data from single signon system directly.

2 Deploying OFS Institutional Performance Analytics Report Analytics

The deployment of OFS Institutional Performance Analytics (OFS IPA) Report Analytics involves the following tasks:

- Deploying OFS IPA RPD File
- Deploying OFS IPA Catalog Files

2.1 Deploying OFS IPA RPD File

To deploy the RPD file, follow these steps:

1. Copy the RPD file from the following location for the OFS IPA application.

   Table 1: RPD File

Application	File Name	Location
IPA	OFSAA_Analytics.rpd	$FIC_HOME/OFS_IPA_DASHBOARDS/12.2.1.4.0/datamodel

2. Paste the copied RPD file in the Windows machine where the OBIEE Windows Administration client is installed and deployed.
3. Open the RPD file online with the default password. The default password is Admin123.
4. In the OBIEE Windows Administration client, from the **File** menu, select **Save**.
5. Click **Yes** in the dialog box, **Do you want to check global consistency?**
6. Click **OK** to acknowledge the message, *Consistency check didn't find any errors, warning, or best practices violations*.

   You can ignore the warnings on the consistency check.

2.2 Deploying OFS IPA Catalog Files

To deploy the Catalog files, follow these steps:

1. Copy the Catalog files from the following locations for the OFS IPA application.

   Table 2: Catalog Files

Application	File Name	Location
IPA	OFSAA_Analytics.catalog	$FIC_HOME/OFS_IPA_DASHBOARDS/12.2.1.4.0/content/catalog
IPA	OFSAA_Analytics_IPA.catalog	$FIC_HOME/OFS_IPA_DASHBOARDS/12.2.1.4.0/content/catalog

2. Paste the copied catalog files to a local folder.

3. Open the analytics OBIEE URL-(`http://<ipaddress>:<port>/analytics`) and login with your server credentials.
4. Click the **Catalog** link available on the top right corner.
5. Click **Shared Folders** and then click **Un-Archive**.
6. Browse the path where catalog files are copied in the local folder. Select a file and click **Open**. Then click **OK**. Repeat this for the remaining catalog files.
7. Click any of the **Dashboards** and verify if all the reports are available.

3 Post-Installation Steps

After successfully deploying the RPD and Catalog files, perform the following steps:

1. Apply the patch **Bundle Patch** for OBIEE 12.2.1.4.0. See the **Readme** packaged with the patch for further instructions on how to install the patch. See the Doc ID 2070465.1 for more information about the bundle patch.
2. Do the following changes in the `instanceconfig.xml` file:
   a. Backup and edit the `instanceconfig.xml` file located at:

   `$ORACLE_HOME/user_projects/domains/bi/config/fmwconfig/biconfig/OBIPS`

Table 3: Tags and Changes for instanceconfig.xml File

Tag to be changed or added	Changes

Change the following tag: `<Views>`	`<Charts>`
	`<DefaultWebImageType>flash</DefaultWebImageType>`
	`<MaxVisibleColumns>10000</MaxVisibleColumns>`
	`<MaxVisiblePages>600000</MaxVisiblePages>`
	`<MaxVisibleRows>900000</MaxVisibleRows>`
	`<MaxVisibleSections>600000</MaxVisibleSections>`
	`<JavaHostReadLimitInKB>8192</JavaHostReadLimitInKB>`
	`</Charts>`
	`<Cube>`
	`<CubeMaxRecords>9999999</CubeMaxRecords>`
	`<CubeMaxPopulatedCells>999999999</CubeMaxPopulatedCells>`
	`</Cube>`

Change the following tag: `<Security>`	`<Security>`
	`<CheckUrlFreshness>false</CheckUrlFreshness>`
	`<EnableSavingContentWithHTML>true</EnableSavingContentWithHTML>`
	`</Security>`

Add the following tag: `<ServerInstance>`	`<Prompts>`
	`<MaxDropDownValues>256</MaxDropDownValues>`
	`<ResultRowLimit>65000</ResultRowLimit>`
	`<AutoApplyDashboardPromptValues>true</AutoApplyDashboardPromptValues>`
	`<AutoSearchPromptDialogBox>true</AutoSearchPromptDialogBox>`
	`<AutoCompletePromptDropDowns>`
	`<SupportAutoComplete>true</SupportAutoComplete>`
	`<CaseInsensitive>true</CaseInsensitive>`
	`<MatchingLevel>MatchAll</MatchingLevel>`
	`<ResultsLimit>50</ResultsLimit>`
	`</AutoCompletePromptDropDowns>`
	`<ShowNullValueWhenColumnIsNullable>never</ShowNullValueWhenColumnIsNullable>`
	`</Prompts>`

b. Save and close the file.

c. Restart the presentation server for the changes to take effect.

3. Do the following changes in the `NQSConfig.INI` file.

Evaluate function is used in filters of many reports. To support the evaluation function in reports, the value of `EVALUATE_SUPPORT_LEVEL` must be set as **2** instead of **0** in the `NQSConfig.INI` file of the OBIEE server present in the `$ORACLE_HOME/user_projects/domains/bi/config/fmwconfig/biconfig/OBIS` directory.

4 Deploying D3 on OBIEE Server

This section provides detailed steps to install and configure D3, a visualization framework, which is used in a few reports of the OFS IPA application.

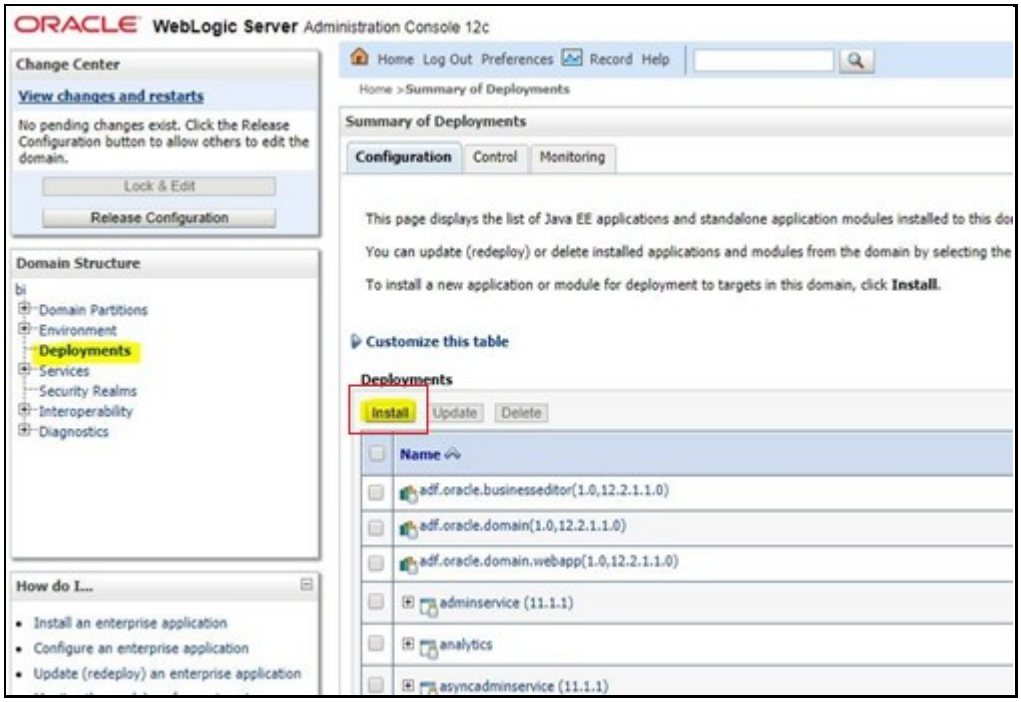
To deploy the D3 in the OBIEE server, follow these steps:

1. Copy the `analyticsRes` folder from `$FIC_HOME/OFS_IPA_DASHBOARDS` directory to OBIEE Server at the following location:

   `$ORACLE_HOME/user_projects/domains/`

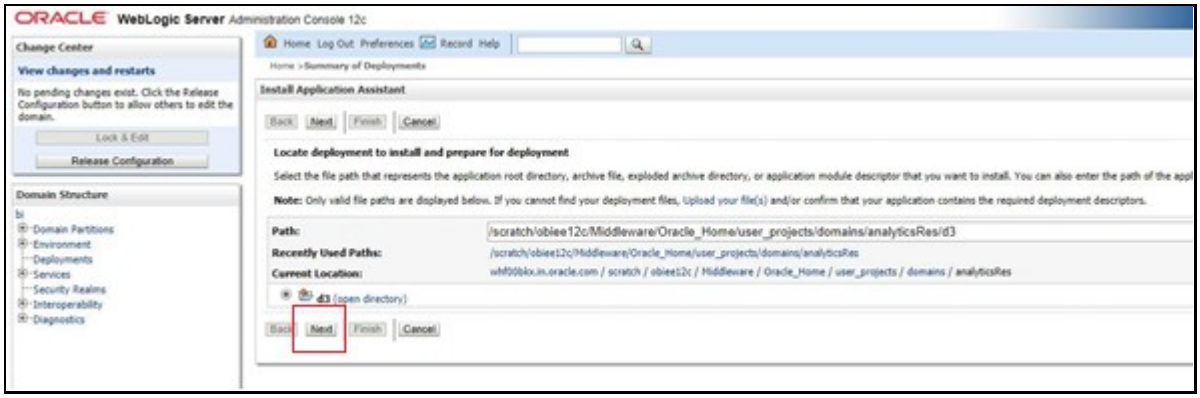
2. Log in to the WebLogic server, navigate to **Deployments** in your **Domain Structure**, and then click **Install**.

Figure 1: WebLogic Administration Console



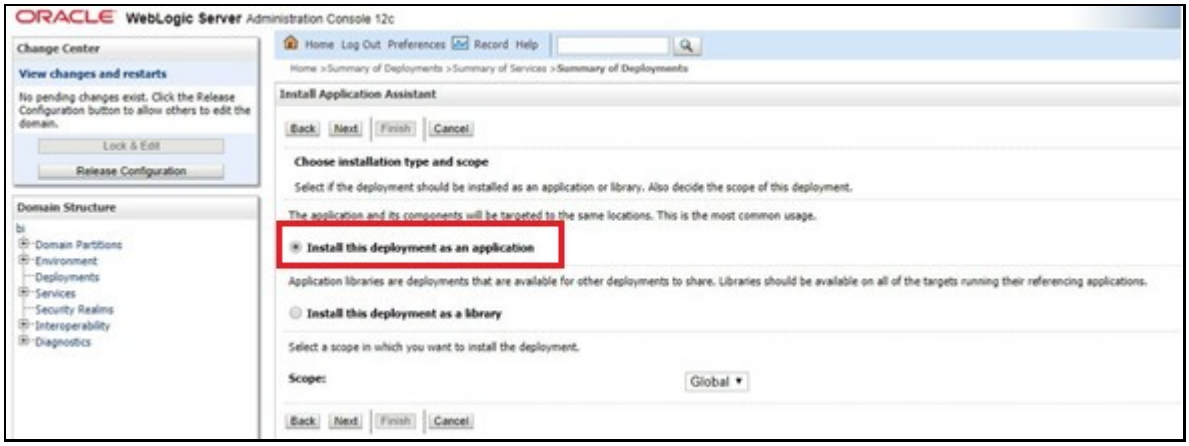
3. Paste the full path of the **D3** directory, select **d3 (open directory)**, and click **Next**.

Figure 2: WebLogic Administration Console – Locale Deployment



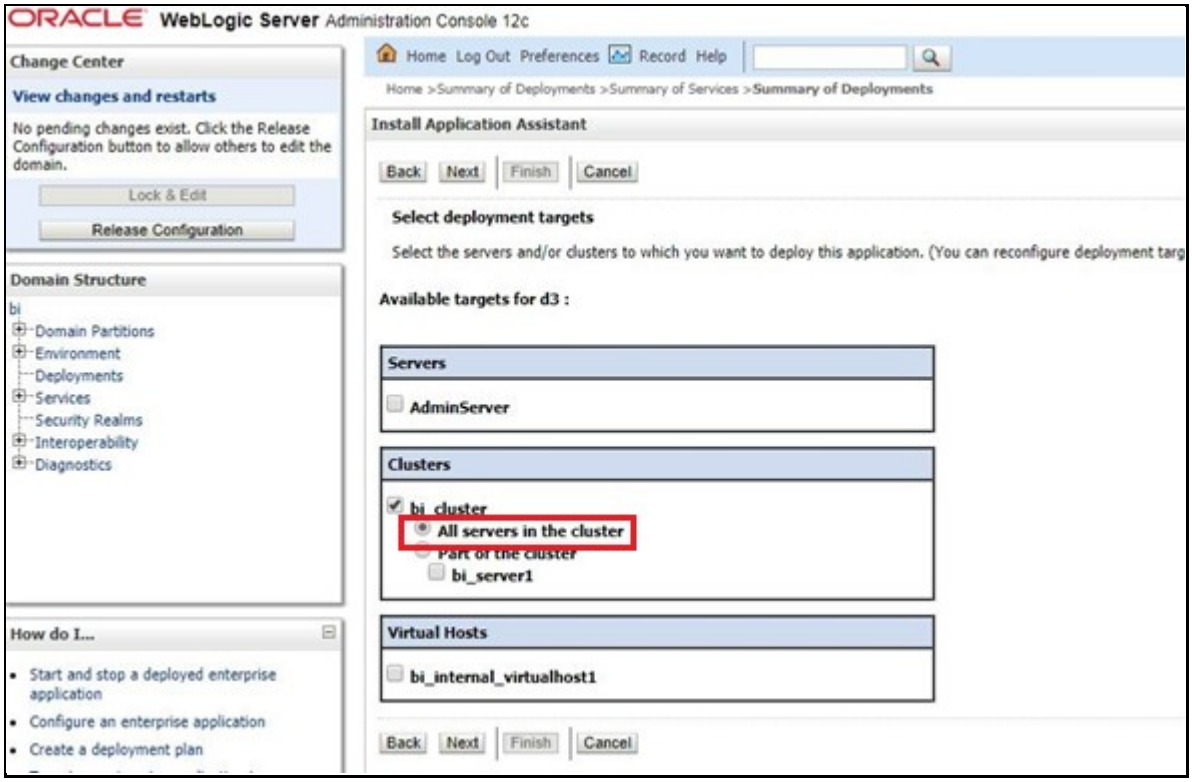
4. Select **Install this deployment as an application** and click **Next**.

Figure 3: WebLogic Administration Console – Installation Type Selection



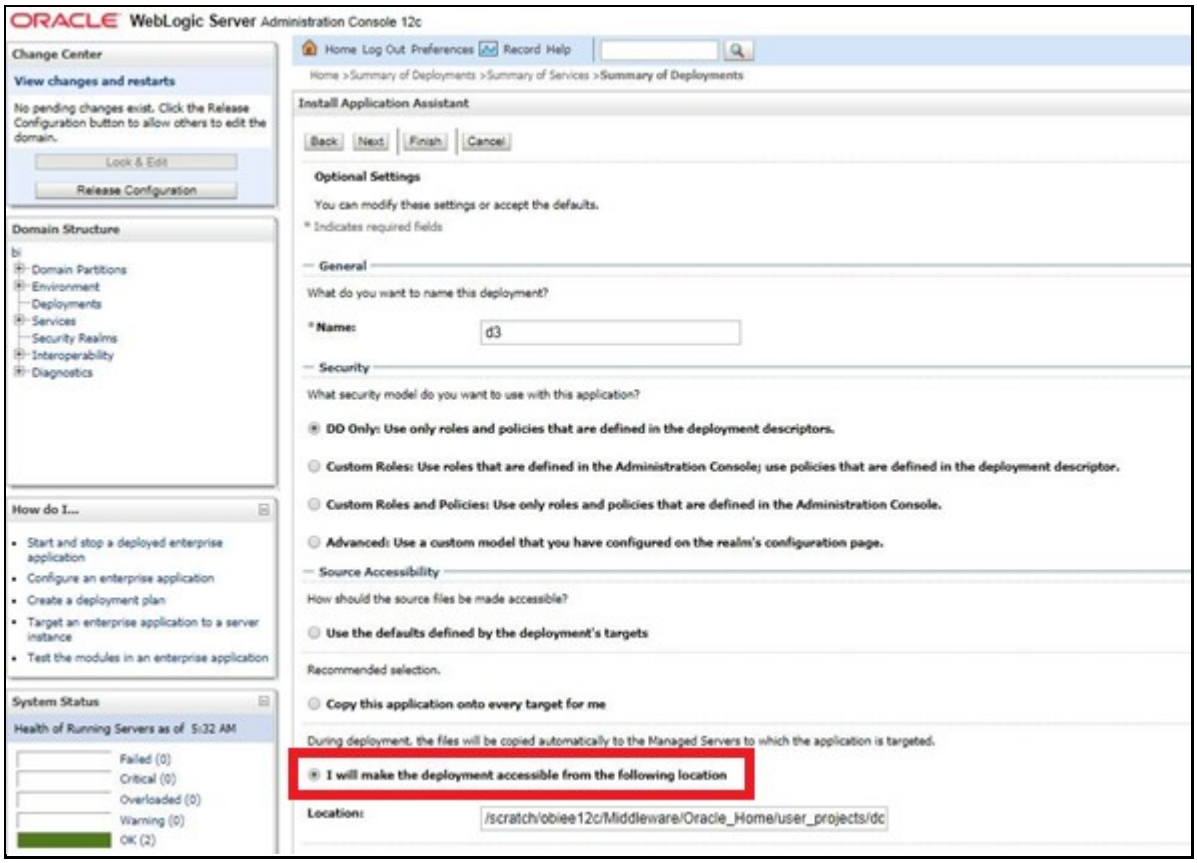
5. Select **bi_cluster**, and then select **All servers in the cluster**.

Figure 4: WebLogic Administration Console – Deployment Targets



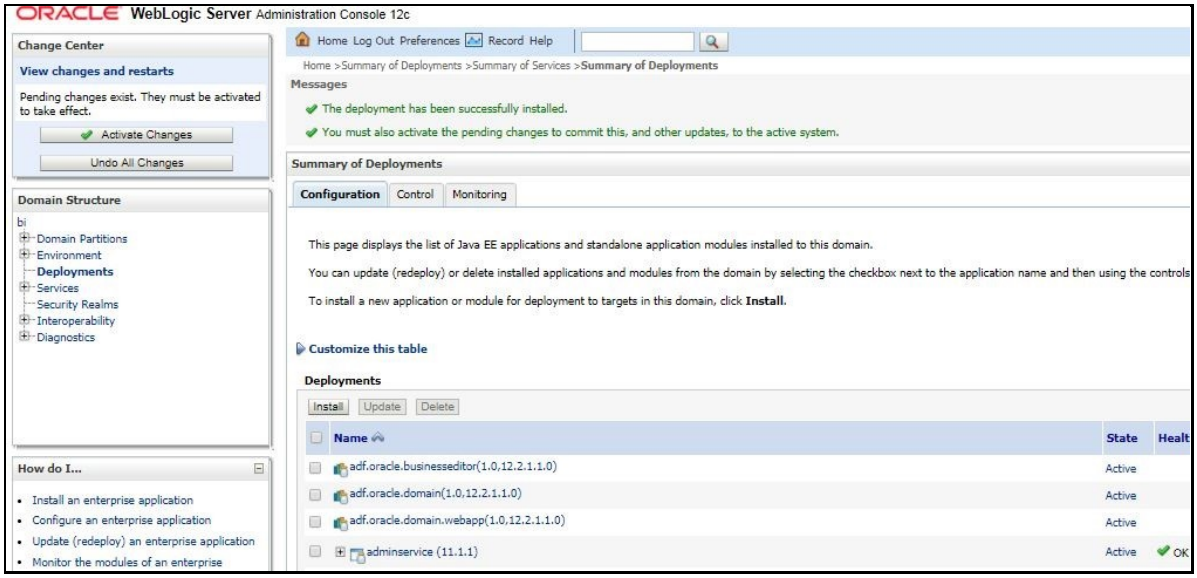
6. Select **I will make the deployment accessible from the following location** (as highlighted in the following screenshot) and click **Finish**.

Figure 5: WebLogic Administration Console – Optional Settings



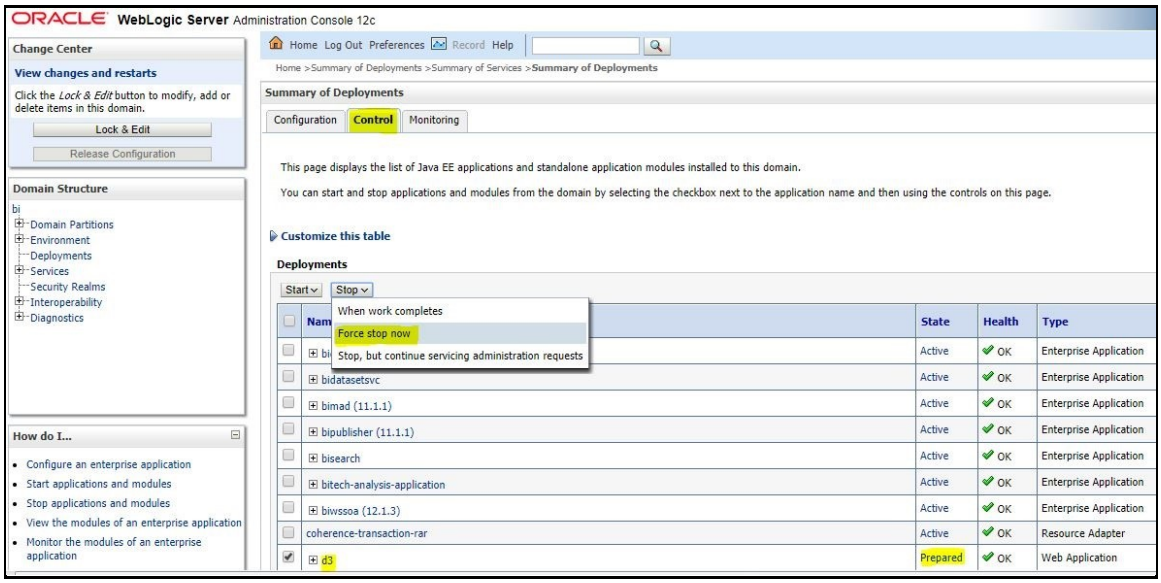
7. Click **Activate Changes**.

Figure 6: WebLogic Administration Console – Summary of Deployments



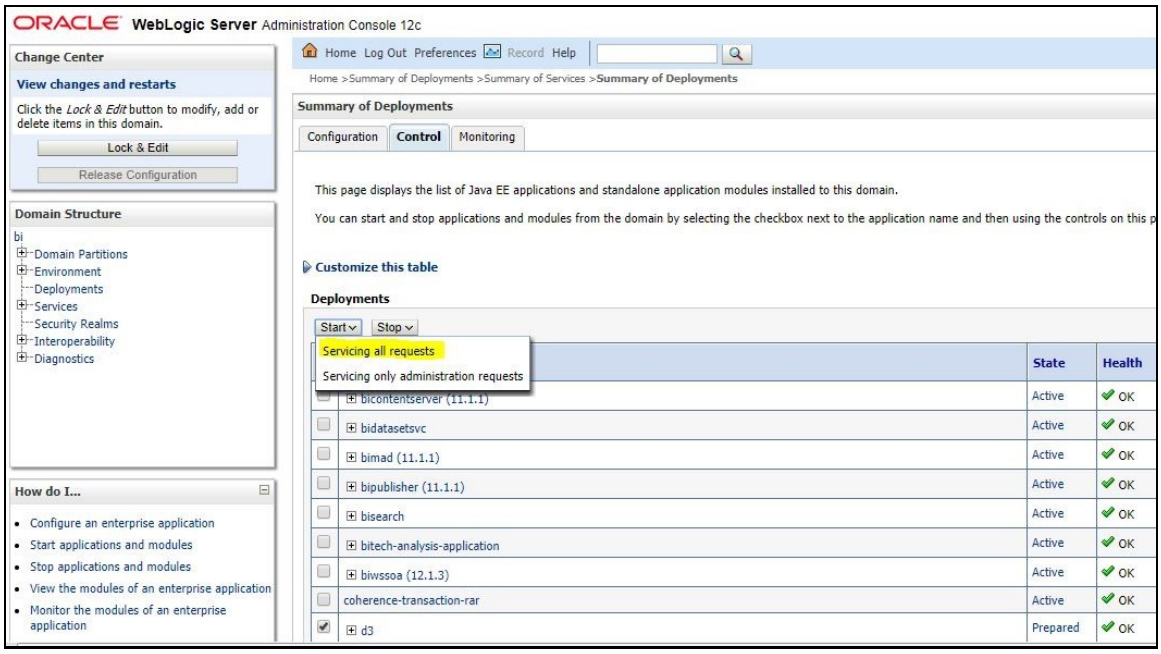
8. After activating the changes, the application will now be in a **Prepared** state. Select the **Control** tab. All the installed applications are displayed. Select the application from the **Deployments** table, click **Stop**, and then select **Force stop now** from the drop-down menu.

Figure 7: WebLogic Administration Console – Customize the Deployed Applications



9. Start the application by selecting the check box next to it and then select **Servicing all requests** from the **Start** drop-down menu in the **Deployments** table in the WebLogic Server Administration Console.

Figure 8: WebLogic Administration Console – Customize the Deployed Applications



10. The application will now change to the **Active** state and is ready to use.

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