Oracle Financial Services Institutional Performance Analytics

OBIEE Deployment Guide

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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.

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4. Click on Groups tab of User and Groups.

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	E Deployers	Deployees can view all resource attributes and deploy applications.	Cellaubhutherricator
System Status	0. Cutherape		DefaultAuthenisator
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5. Click on **New** and create new user group as 'Restricted Access'.

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View changes and restarts	Home i durinary of Security Reality:	time sharing of Search, Search single in Const. of English Administration Search S					
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- Security Realine 8: Interspendicity 8: Diagnostics	How would you like to describe the Description:	an (hug)					
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	Presiden	Default/uthenticator 🕶					
How do L. 8	(del (dene)						
 Create prope Modify prope Deline prope Create uses 							

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

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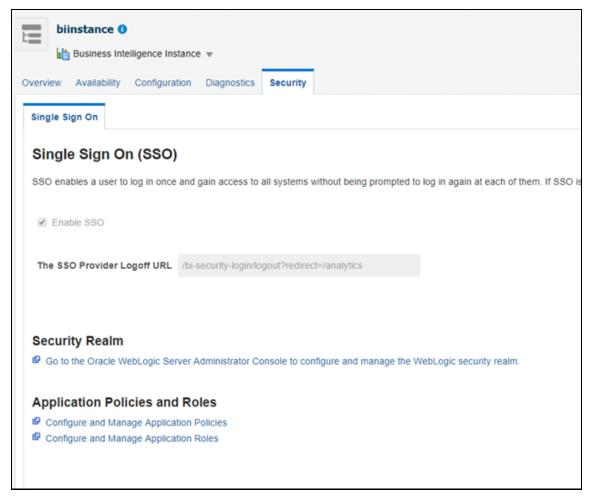
7. Map the newly created users to 'Restricted Access' group, which need Data Visibility.

Change Center	🏚 Home Lag Dut Preferences 🔛 Record Help	Welcome, weblagic Connected to: bi		
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Look & Edit Release Configuration	Loss & Edit			
Domain Structure	Use The page to configure group membership for the user.			
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Have do L	(Inn)			

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

ORACLE' Enterprise Manager Pusion Mid	Rdeware Control 12c	🔀 WebLogic Domain 👻 🛛 weblogic 👻 🐝
Target Navigation		े र छ र । 5 мар 2009 3.112 मा स्था हा दु
En vescupe Coman Environment Environment Environment Environment Environment Environment Environment Environment	ins without being prompted to tog in again at each of them. If SSO is enabled then Crace Business Intelligence will not challenge th	Apply e user for authentication and will assume the user has arready been authenticated by
	den-ch-Vacalitytics	

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.

Create Application F	tole	
Role (or Enterprise Role) is the	proup of users designed at the enterprise level and typically used to a	assign a privilege or permission. A role can also contain other roles as members.
General		
Application Stripe	obi	Role Name
* Role Name	OFSAA CI Data Visibility - MGR	
Display Name	Users granted this role will have restricted access to data	
Description		
Members An application role may need to	be mapped to users or groups defined in enterprise LDAP server, or	in the role can be mapped to other application roles.
Vew * + Add 🖂		
Name		
No groups or application roles	sdded.	
4		

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

biinstance O					
Application Roles	ence instance *				
	used by security a	ware applications t	hat are specific to th	e application. These roles are seeded by applications in single global policy store when the applications are registered. These are also appl	
Policy Store Provider					
Search	and to enser when	a defined by this set	and a start start start	ication stripe to search if application uses a stripe that is different from application name.	
				casion simple to search if application uses a simple that is otherent from application name.	
Ap	plication Stripe	001	Ŷ		
	Role Name	Starts With 🛩		>	
View + 📲 Create	Create Lik	e / Edit	X Delete		
1					
Role Name		Display Name		Description	
BIServiceAdministrator		BI Service Adminis	trator	This role confers privileges required to administer the sample application.	
BIContentAuthor		BI Content Author		Users with this role can create most types of content.	
BIConsumer		BI Consumer		Users granted this role can consume content but are restricted in what they can create.	
OFSAA CI Data Visibility -	MGR	Users granted this	role will have restric	kan l	
A Membership for O	FSAA CI Dat	a Visibility - N	IGR		
Principal	Display Name	Type		Description	
Restricted Access	Restricted Acces	s Group	. F	Restricted access to data	

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	<pre>\$FIC_HOME/OFS_IPA_DASHBOARDS/12.2.1.4.0/datamodel</pre>

- **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	<pre>\$FIC_HOME/OFS_IPA_DASHBOARDS/12.2.1.4.0/content /catalog</pre>
IPA	OFSAA_Analytics_IPA.ca talog	<pre>\$FIC_HOME/OFS_IPA_DASHBOARDS/12.2.1.4.0/content /catalog</pre>

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:

- 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 <u>2070465.1</u> 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

Tag to be changed or added	Changes
Change the following tag: <views></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>99999999</cubemaxpopulatedcells> </cube>
Change the following tag: <security></security>	<security> <checkurlfreshness>false</checkurlfreshness> <enablesavingcontentwithhtml>true</enablesavingcontentwithhtml> </security>
Add the following tag: <serverins tance></serverins 	<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>neverIsNullable> </shownullvaluewhencolumnisnullable></prompts>

Table 3: Tags and Changes for instanceconfig.xml File

- **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**.

Change Center	🏠 Home Log Out Preferences 🔤 Record Help					
View changes and restarts	Home >Summary of Deployments					
No pending changes exist. Click the Release	Summary of Deployments					
Configuration button to allow others to edit the domain.	Configuration Control Monitoring					
Lock & Edit						
Release Configuration	This page displays the list of Java EE applications and standalone application modules installed to this d					
Domain Structure	You can update (redeploy) or delete installed applications and modules from the domain by selecting th					
bi	To install a new application or module for deployment to targets in this domain, click Install.					
Domain Partitions						
Environment Deployments						
B Services	Deployments					
Security Realms						
B-Interoperability B-Diagnostics	Install Update Delete					
	🔁 Name 🙈					
	Adf.oracle.businesseditor(1.0,12.2.1.1.0)					
	adf.oracle.domain(1.0,12.2.1.1.0)					
]	adf.oracle.domain.webapp(1.0,12.2.1.1.0)					
How do I 🗉	B					
 Install an enterprise application 	Commission (11-1-1)					
	E B analytics					
 Configure an enterprise application 						

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

ORACLE WebLogic Server Ade					
Change Center	😧 Home Log Out Preferences 🔛	Record Help			
View changes and restarts	Home > Summary of Deployments				
No pending changes exist. Click the Release	Install Application Assistant				
Configuration button to allow others to edit the domain.	Eack Next Frenh Cancel				
Lock & Edit					
Release Configuration	Locate deployment to install and prepare for deployment				
	Select the file path that represents th	he application root directory, archive file, exploded archive directory, or application module descriptor that you want to install. You can also enter the path of the appl			
Domain Structure	Note: Only valid file paths are displayed below. If you cannot find your deployment files, Upload your file(s) and/or confirm that your application contains the required deployment descriptors.				
bi ® Domain Partitions	Path:	/scratch/obiee12c/Middleware/Oracle_Home/user_projects/domains/analyticsRes/d3			
8 Environment	Recently Used Paths:	/scratch/obiee12clMiddeware/Oracle_Home/user_projects/domains/analyticsRes			
Deployments Br-Services	Current Location:	wh00bbkuin.oracle.com / ocratch / obiest2c / Hiddleware / Oracle_Home / user_projects / domains / analyticsRes			
Security Realms ® Interoperability	🖲 🏝 d3 (open directory)				
®-Diagnostics	Back Next Finish Cancel				
	(pace) (weat) (commit (comme)				

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

Figure 3: WebLogic Administration Console – Installation Type Selection

ORACLE WebLogic Server Ad	ministration Console 12c
Change Center	🍘 Home Lag Out Preferences 🖾 Record Help
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments
No pending changes exist. Click the Release	Install Application Assistant
Configuration button to allow others to edit the domain.	Back Next Finish Cancel
Lock & Edit	
Release Configuration	Choose installation type and scope Select if the deployment should be installed as an application or library. Also decide the scope of this deployment.
Domain Structure	
ы	The application and its components will be targeted to the same locations. This is the most common usage.
8 Domain Partitions	Install this deployment as an application
Deployments	Application libraries are deployments that are available for other deployments to share. Libraries should be available on all of the targets running their referencing applications.
Services Security Realms Br Interoperability	Install this deployment as a library
®-Diagnostics	Select a scope in which you want to install the deployment,
	Scope: Giobal •
	Back Next Print Cancel

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

Figure 4: WebLogic Administration Console – Deployment Targets

ORACLE WebLogic Server Ad	ministration Console 12c
Change Center	🏦 Home Log Out Preferences 🛃 Record Help
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments
No pending changes exist. Click the Release Configuration button to allow others to edit the domain. Lock & Edit Release Configuration Domain Structure bi Domain Partitions Domain Partitions	Install Application Assistant Back Next Finish Cancel Select deployment targets Select the servers and/or clusters to which you want to deploy this application. (You can reconfigure deployment target Available targets for d3 : Servers
Deployments Services Security Realms Diagnostics	Clusters Cluster All servers in the cluster Part or the cluster bi_server1
How do I	Virtual Hosts
 Start and stop a deployed enterprise application 	bi_internal_virtualhost1
 Configure an enterprise application Create a deployment plan 	Back Next Finish Cancel

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

ORACLE WebLogic Server Adm	ninistration Console 12c				
Change Center	🙆 Home Log Cut Preferences 📈 Record Help				
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments				
No pending changes exist. Click the Release	Install Application Assistant				
Configuration button to allow others to edit the domain.	Back Next Cancel				
Look & Edit Release Configuration	Optional Settings You can modify these settings or accept the defaults.				
Domain Structure	* Indicates required fields				
bi Domain Partitions	- General				
Environment Deployments	What do you want to name this deployment?				
Services Security Realms	*Name: 03				
8 Diagnostics	- Security				
	What security model do you want to use with this application?				
	DD Only: Use only roles and policies that are defined in the deployment descriptors.				
	© Custom Roles: Use roles that are defined in the Administration Console; use policies that are defined in the deployment descriptor.				
How do I	Custom Roles and Policies: Use only roles and policies that are defined in the Administration Console.				
 Start and stop a deployed enterprise application 	Advanced: Use a custom model that you have configured on the realm's configuration page.				
Configure an enterprise application	- Source Accessibility				
Create a deployment plan	How should the source files be made accessible?				
 Target an enterprise application to a server instance 	Use the defaults defined by the deployment's targets				
Test the modules in an enterprise application	Recommended selection.				
System Status	Copy this application onto every target for me				
Health of Running Servers as of \$132 AM	During deployment, the files will be copied automatically to the Managed Servers to which the application is targeted.				
Failed (0) Critical (0)	1 will make the deployment accessible from the following location				
Overloaded (0)					
Warning (0) OK (2)	Location: /scratch/obiee12c/Middleware/Oracle_Home/user_projects/dc				
54 (4)					

Figure 5: WebLogic Administration Console – Optional Settings

7. Click Activate Changes.

Figure 6: WebLogic Administration Console – Summary of Deployments

ORACLE WebLogic Server Adv	ministration Console 12c				
Change Center	🙆 Home Log Out Preference	ces 🚵 Record Help	Q		
View changes and restarts Pending changes exist. They must be activated to take effect.	Messages The deployment has been	and the second se	ary of Deployments		
Undo All Changes	Summary of Deployments				
Domain Structure	Configuration Control	Monitoring			
bi ⊕ Domain Partitions ⊕ Environment → Deployments ⊕ Services → Services ⊕ Interoperability ⊕ Diagnostics	You can update (redeploy) To install a new application Customize this table Deployments Install Update Delet	or delete installed applications a	falone application modules installed to this domain. nd modules from the domain by selecting the checkbox rgets in this domain, click Install .		
. <u></u>	🔲 Name 🏟			State	e Healt
How do I	adf.oracle.business	editor(1.0,12.2.1.1.0)		Active	2
Install an enterprise application	📄 👘 adf.oracle.domain(1.0,12.2.1.1.0)		Active	2
Configure an enterprise application	🔲 👘 adf.oracle.domain.v	webapp(1.0,12.2.1.1.0)		Active	e
Update (redeploy) an enterprise application Monitor the modules of an enterprise	🔲 🗄 🔂 adminservice (1	1.1.1)		Active	e 🖋 OK

 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

ORACLE WebLogic Server Adm	nistration Console 12c						
Change Center	🔒 Home Log Out Preferences 🔤 Record Help						
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments						
Click the Lock & Edit button to modify, add or delete items in this domain.	Summary of Deployments						
Lock & Edit	Configuration Control Monitoring						
Release Configuration	This page displays the list of Java EE applications and standalone application modules installed to this domain.						
Domain Structure	You can start and stop applications and modules from the domain by selecting the checkbox next to the application name and then us	sing the contr	ols on this pa	age.			
bi Domain Partitions D-Environment D-Deployments D-Services	Customize this table Deployments						
Security Realms	Start Stop V						
⊕-Interoperability ⊕-Diagnostics	Nam Force stop now	State	Health	Туре			
	□	Active	🖋 ОК	Enterprise Application			
	🗈 🗄 bidatasetsvc	Active	🖋 ок	Enterprise Application			
	□	Active	🖋 ок	Enterprise Application			
How do I	E bipublisher (11.1.1)	Active	🖋 ок	Enterprise Application			
Configure an enterprise application	□ 🗷 bisearch			Enterprise Application			
Start applications and modules	E bitech-analysis-application	Active	🖋 ОК	Enterprise Application			
Stop applications and modules	■	Active	🖋 ок	Enterprise Application			
 View the modules of an enterprise application Monitor the modules of an enterprise 	coherence-transaction-rar	Active	🖋 ОК	Resource Adapter			
application	🗹 🕀 😆	🖋 ОК	Web Application				

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	8: WebLogic	Administration	Console -	Customize	the Dep	loved A	pplications
	••••••••••••••••••••••••••••••••••••••						P P

ORACLE WebLogic Server Adm	ninistration C	onsole 12c						
Change Center	🔒 Home Log Out Preferences 🖾 Record Help							
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments							
Click the Lock & Edit button to modify, add or	Summary of Deployments							
delete items in this domain. Lock & Edit	Configura	tion Control	Monitoring					
Release Configuration This page displays the list of Java EE applications and standalone application modules installed to this domain.								
Domain Structure		ize this table	oplications and n	odules from the domain by selecting the checkbox next to the application name and then us	ing the contr	ols on this p		
Security Realms	Start~	Stop ~						
⊕-Interoperability ⊕-Diagnostics		ng all requests ng only administr	ation requests		State	Health		
		bicontentserver	24		Active	🖋 ок		
	•	bidatasetsvc			Active	🖋 ОК		
	•	bimad (11.1.1)			Active	🖋 ок		
How do I	•	bipublisher (11.1	1.1)		Active	🖋 ОК		
Configure an enterprise application	•	bisearch			Active	🖋 ОК		
Start applications and modules	•	bitech-analysis-a	pplication		Active	🖋 ок		
Stop applications and modules		biwssoa (12.1.3))		Active	🖋 ОК		
 View the modules of an enterprise application Monitor the modules of an enterprise 	CO	nerence-transacti	on-rar		Active	🖋 ОК		
application	•	d3			Prepared	🖋 ок		

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

OFSAA Support

Raise a Service Request (SR) in <u>My Oracle Support (MOS)</u> for queries related to the OFSAA applications.

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