

**Oracle® Financial Services Enterprise  
Case Management Application Pack**

Installation Guide

Release 8.0.7.0.0

February 2019

Installation Guide, Release 8.0.7.0.0

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# Document Control

This section provides the revision details of the document.

Version Number	Revision Date	Changes Done
1.0	Created: December 2018	Captured installation and configuration steps for 8.0.7.0.0 Release.
1.1	Modified January 2019	Added 29270396 patch details
1.2	Modified December 2019	A note has been added about AM to be used as Read Only

This document includes the necessary instructions to install the OFS ECM Application Pack 8.0.7.0.0 and perform the required post installation configurations. The latest copy of this guide can be accessed from OHC Documentation Library.



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# Preface

This section provides supporting information for the Oracle Financial Services Enterprise Case Management Application Pack (OFS ECM) Installation Guide and includes the following topics:

- [Summary](#)
- [Audience](#)
- [Related Documents](#)
- [Conventions](#)
- [Abbreviations](#)

## Summary

You can find the latest copy of this document in [OTN Library](#) which includes all the recent additions/revisions (if any) done till date.

Before you begin the installation, ensure that you have access to the Oracle Support Services Portal with the required login credentials to quickly notify us of any issues at any stage. You can obtain the login credentials by contacting Oracle Support Services.

## Audience

Oracle Financial Services Enterprise Case Management Pack Installation Guide is intended for administrators and implementation consultants who are responsible for installing and maintaining the Application Pack components.

### Prerequisites for the Audience

The following are the prerequisites from the administrators installing OFS ECM:

This document assumes that you have experience in installing Enterprise components and basic knowledge about the following:

- OFS ECM pack components
- OFSAA Architecture
- UNIX Commands
- Database Concepts
- Web server/ Web application server

## Related Documents

This section identifies additional documents related to OFS ECM.

### OFSAAI Related Documents

Following documents are available in [OHC](#).

- *Oracle Financial Services Advanced Analytical Applications Infrastructure Applications Pack Installation and Configuration Guide*
- *Oracle Financial Services Analytical Applications Infrastructure Environment Check Utility Guide*
- *Oracle Financial Services Analytical Applications Infrastructure Administration Guide*
- *Oracle Financial Services Analytical Applications Infrastructure User Guide*

### OFS ECM Application Related Documents

Following documents are available in [OHC](#).

- *Oracle Financial Services Enterprise Case Management Administration Guide*
- *Oracle Financial Services Enterprise Case Management User Guide*
- *Oracle Financial Services Enterprise Case Management Configuration Guide*
- *Oracle Financial Services Enterprise Case Management Release Notes*

The following documents are available in My Oracle Support (MOS). You should have SSO credentials to access MOS.

- *Oracle Financial Services Analytical Applications Infrastructure Security Guide*

## Conventions

The following text conventions are used in this document:

**Table 0–1 Conventions used in this guide**

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## Abbreviations

The following table lists the abbreviations used in this document:

**Table 0–2 Abbreviations and their meaning**

Abbreviation	Meaning
ECM	Enterprise Case Management
GUI	Graphical User Interface
HTTPS	Hypertext Transfer Protocol Secure

**Table 0–2 Abbreviations and their meaning**

<b>Abbreviation</b>	<b>Meaning</b>
J2C	J2EE Connector
J2EE	Java 2 Enterprise Edition
JDBC	Java Database Connectivity
LDAP	Lightweight Directory Access Protocol
LHS	Left Hand Side
MOS	My Oracle Support
OFSA	Oracle Financial Services Analytical Application
OFSAI	Oracle Financial Services Analytical Application Infrastructure
OLAP	On-Line Analytical Processing
OS	Operating System
SFTP	Secure File Transfer Protocol
URL	Uniform Resource Locator
Web Archive	WAR
XML	Extensible Markup Language



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# About OFSAA and OFSAA Applications Packs

This chapter provides complete details about Enterprise Case Management (ECM) Application Pack.

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**Note:** With the release of Behavior Detection Framework (BDF) 8.0.5, dispositioning alert through Alert Management is no longer supported. Alert Management is only applicable to Trading Compliance and Broker Compliance. For AML and Fraud alerts, the Event Correlation module in Enterprise Case Management should be used to correlate events from the FCCM Behavior Detection engine or those ingested from external applications. Alert Management (AM) can be used as read-only for viewing historical alerts but it is not to be used for investigating alerts, taking action on them, editing them and/or promoting them to a case. The manual Promote to Case functionality is no longer supported. Customers are to use Enterprise Case Management (ECM) for reviewing and investigating alerts. With the BDF license, a restricted use license of ECM is provided which replicates the functionality available in AM to the best that is currently available within ECM. Implementations should use event correlation to move Alerts from BDF into ECM and then have them correlation/promote to a case where all levels of investigation can occur. If this updated process is not clear to your implementation team it is advised that you contact Oracle Partner Network or Oracle Consulting to be trained.

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This chapter includes the following topics:

- [About OFSAA](#)
- [Introduction to OFS ECM Application](#)
- [About OFSAA Infrastructure](#)
- [About Data Security Configurations](#)

## About OFSAA

In today's turbulent markets, financial institutions require a better understanding of their risk-return, while strengthening competitive advantage and enhancing long-term customer value. Oracle Financial Services Analytical Applications (OFSAA) enable financial institutions to measure and meet risk adjusted performance objectives, cultivate a risk management culture through transparency, lower the costs of compliance and regulation, and improve insight into customer behavior.

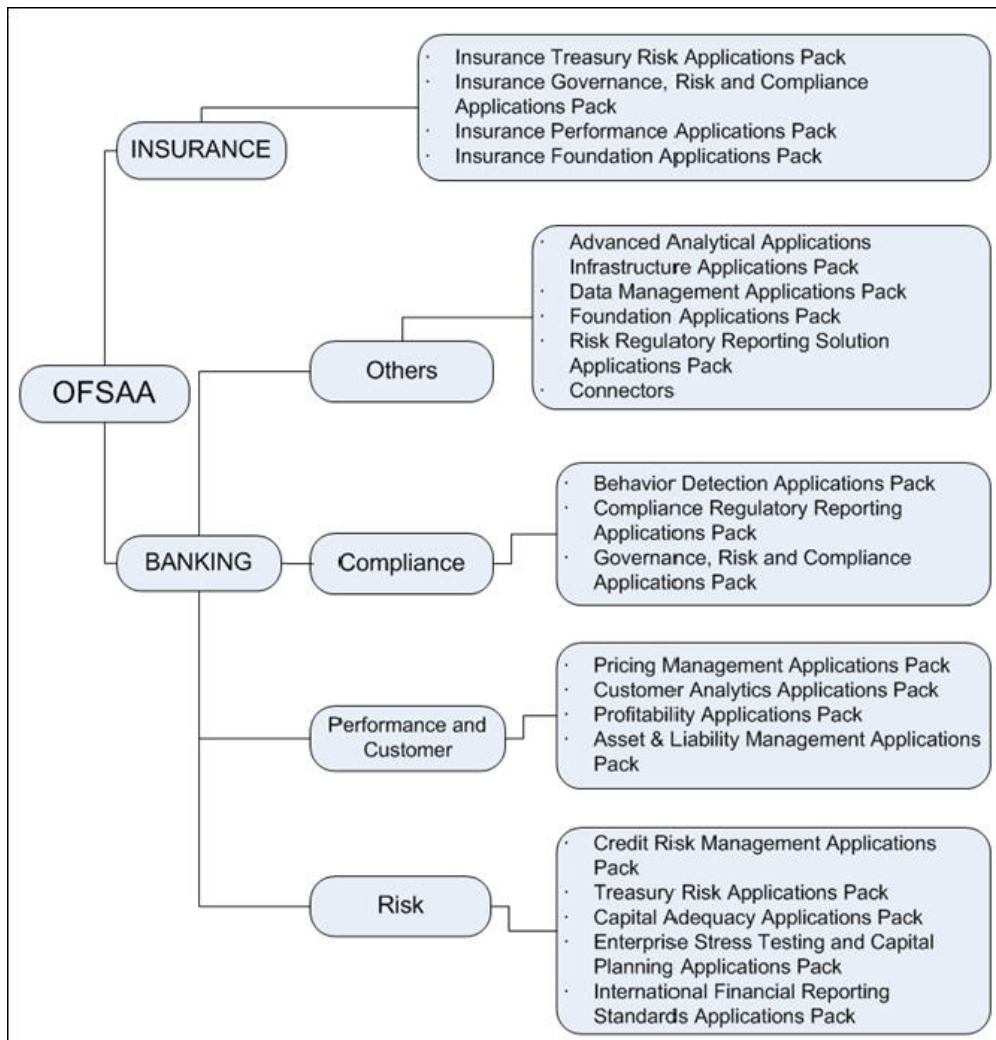
OFSAA uses industry-leading analytical methods, shared data model and applications architecture to enable integrated risk management, performance management, customer insight, and compliance management. OFSAA actively incorporates risk into decision making, enables to achieve a consistent view of performance, promote a transparent risk management culture, and provide pervasive intelligence.

With the help of OFSAA, the financial services organizations can achieve, management excellence with a lower total cost of ownership, due to our integrated, architecture, combining performance and risk applications into a single, seamlessly integrated framework.

OFSAA delivers a comprehensive and integrated suite of financial services analytical applications for both banking and insurance domain.

The [Figure 1-1](#) depicts the various Applications Pack that are available across the OFSAA Banking and Insurance domains:

**Figure 1-1 OFSAA Applications Packs**



## Introduction to OFS ECM Application

OFS ECM Application Pack includes the following applications:



- **Oracle Financial Services Analytical Applications Infrastructure (OFSAAI)** powers the Oracle Financial Services Analytical Applications family of products to perform the processing, categorizing, selection and manipulation of data and information required to analyze, understand and report on specific performance, risk, compliance and customer insight issues by providing a strong foundation for the entire family of Oracle Financial Services Analytical Applications across the domains of Risk, Performance, Compliance and Customer Insight.
- **Oracle Financial Services Inline Processing Engine (OFS IPE)** provides real-time monitoring, detection and interdiction of single and complex fraud events across multiple channels and lines of business.
- **Oracle Financial Services Enterprise Case Management (OFS ECM)** supports the investigation and resolution of ML, KYC, Customer Screening, TBAML, FATCA, and third party events. A newly created case passes through various statuses as part of investigation and reaches closure through resolution actions. Enterprise Case Management supports the modification of the case details and the associated business data. Investigation workflows can vary based upon the type of case being investigated. The case investigation and resolution are supported by various actions, which may be specific to the case type. Access to types of cases and actions are controlled based on the user role and access permissions. Cases are generated from various sources and cases are also manually created in the ECM. Enterprise Case Management supports product default case types that drive the Investigation workflow. Case types are configurable and can be defined by firms to meet their business need. ECM allows to design workflows using Process Modelling Framework.

## About OFSAA Infrastructure

Oracle Financial Services Analytical Applications Infrastructure (OFSAAI) powers the Oracle Financial Services Analytical Applications family of products to perform the processing, categorizing, selection and manipulation of data and information required to analyze, understand and report on specific performance, risk, compliance and customer insight issues by providing a strong foundation for the entire family of Oracle Financial Services Analytical Applications across the domains of Risk, Performance, Compliance, and Customer Insight.

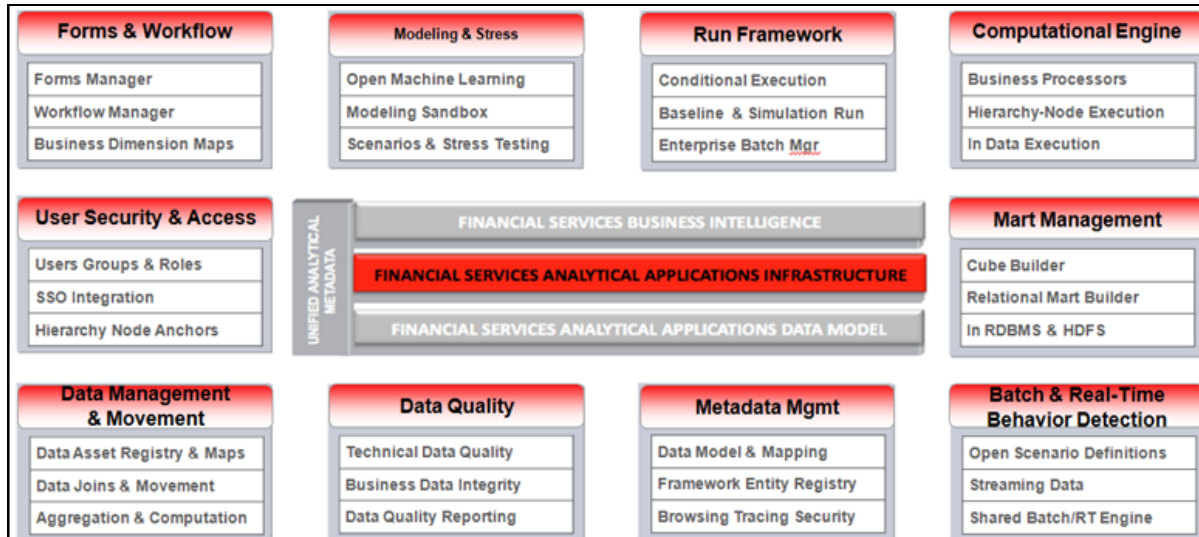
## Components of OFSAAI

The OFSAA Infrastructure includes frameworks that operate on and with the Oracle Financial Services Analytical Applications Data Model and form the array of components within the Infrastructure.

The OFSAA Infrastructure components/ frameworks are installed as two layers: primarily the metadata server and Infrastructure services run on one layer, and the UI and presentation logic runs on the other. The UI and presentation layer is deployed on any of the supported J2EE Servers.

The [Figure 1–2](#) depicts the various frameworks and capabilities that make up the OFSAA Infrastructure:

Figure 1–2 Components of OFSAAI



## OFSAA Infrastructure High Availability

The current release of the OFSAA Infrastructure supports only "Single Instance" installation for the Infrastructure components. However, the High Availability (HA) for the Database Server and/or the Web application server clustering and deployment are supported in this release.

This release supports Active-Passive model of implementation for OFSAAI components. For more information, see [Oracle Financial Services Analytical Applications Configuration for High Availability- Best Practices Guide](#).

## About Data Security Configurations

Data Security refers to the protection of data against unauthorized access and data theft. OFSAA ensures Data Security with the following features:

- Multi-Factor Authentication
- Transparent Data Encryption (TDE)
- Data Redaction
- Key Management
- HTTPS
- Logging

For more details on the features in the previous list, see the [Configuring Transparent Data Encryption \(TDE\) and Data Redaction in OFSAA](#)

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# Understanding OFS ECM Application Pack Installation

This chapter includes the following topics:

- [Installation Overview](#)
- [Deployment Topology](#)
- [Hardware and Software Requirements](#)
- [Verifying System Environment](#)
- [Understanding the Installation Mode](#)

## Installation Overview

This release (8.0.7.0.0) of the OFS ECM Application Pack allows the users/ Administrators to install a new OFS ECM Application Pack 8.0.7.0.0 instance. [Figure 2-1](#) shows the order of procedures required to follow to install a new OFS ECM Application Pack 8.0.7.0.0 instance.

**Figure 2–1 Installation Overview**

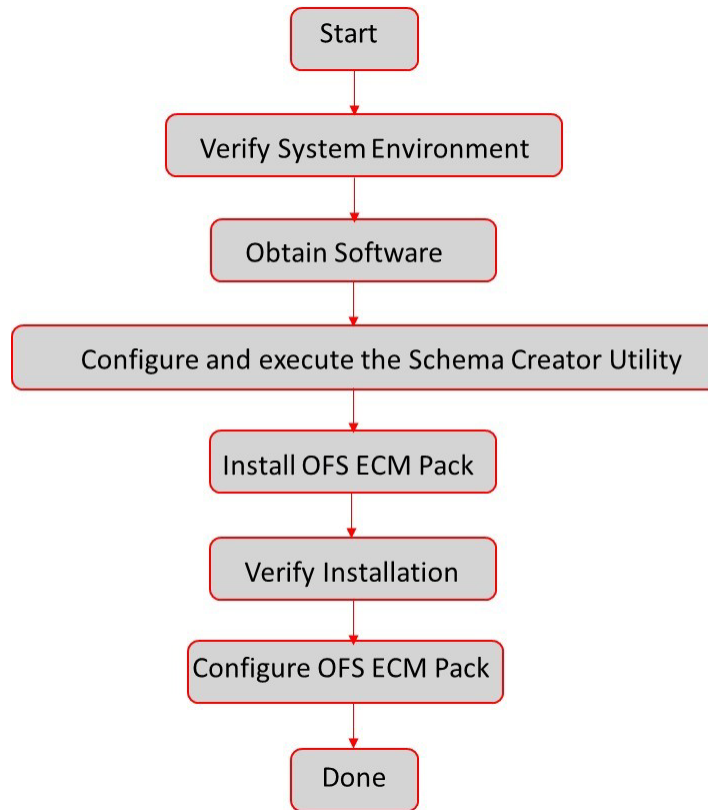


Table 2–1 provides additional information and links to specific documentation for each task in the flowchart.

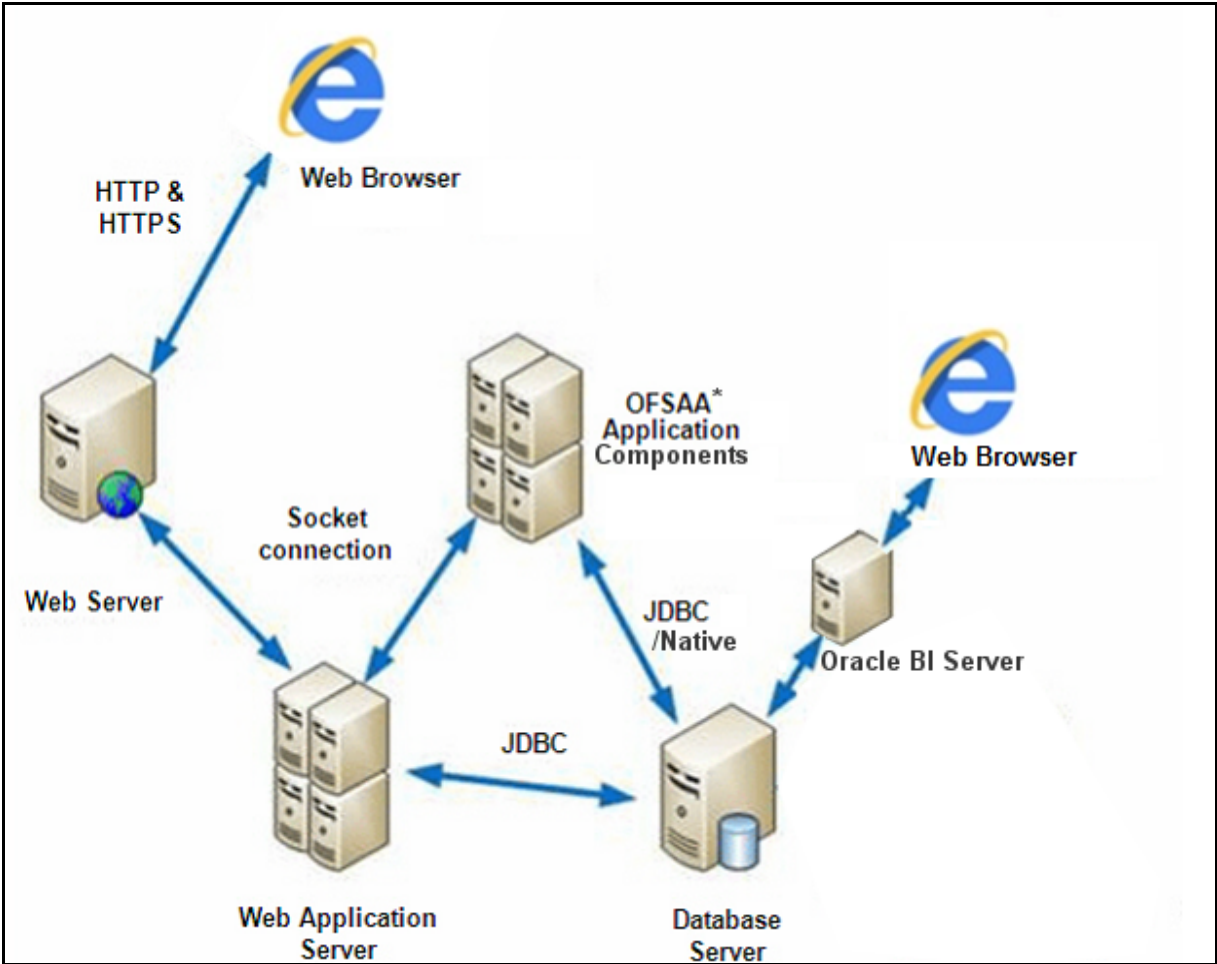
**Table 2–1 OFS ECM Application Pack Installation Tasks and Descriptions**

Tasks	Details and Documentation
Verify Systems Environment	To verify that your system meets the minimum necessary requirements for installing and hosting the OFS ECM Application Pack, see <a href="#">Verifying System Environment</a> .
Obtain the software	To access and download the OFS ECM Application Pack, see <a href="#">Obtaining Software</a> .
Configure and Execute the Schema Creator Utility	To create the database schema, see <a href="#">Configuring and Executing Schema Creator Utility</a> .
Install OFS ECM Pack	To install the OFS ECM Application Pack, see <a href="#">Installing the OFS ECM Application Pack</a> .
Configure OFS ECM Pack after installation	To configure the OFS ECM Application Pack post installation, see <a href="#">Post Installation Configuration</a> .

## Deployment Topology

The [Figure 2–2](#) shows the logical architecture implemented for OFS ECM Application Pack.

Figure 2-2 Deployment Topology



## Hardware and Software Requirements

This section describes the various Operating Systems, Database, Web server, and Web application server versions, and other variant details on which this release of the OFS ECM Application Pack has been qualified.

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Note:

OFS ECM Application Pack installation can be performed on both Virtual and Physical servers.

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The following tables show the minimum hardware and software requirements for installing OFS ECM Application Pack.

### Configurations supported for Java 7

Table 2-2 Configurations Supported for Java 7

Operating System
------------------

**Table 2–2 (Cont.) Configurations Supported for Java 7**

Oracle Linux / Red Hat Enterprise Linux (x86-64)	<ul style="list-style-type: none"> <li>Oracle Linux Server release 6.1 and above - 64 bit</li> <li>Oracle Linux Server release 7.1 and above - 64 bit</li> </ul> <p><b>Note:</b> Same version of RHEL is supported</p>
Oracle Solaris (SPARC)	<ul style="list-style-type: none"> <li>v5.11 update 3 and above - 64 bit</li> </ul>
IBM AIX (POWERPC)	<ul style="list-style-type: none"> <li>AIX 7.1 (TL 09 and above) - 64 bit</li> </ul>
Solaris (X86)	<ul style="list-style-type: none"> <li>5.11 update 3 and above - 64 bit</li> </ul>
Shell	<ul style="list-style-type: none"> <li>KORN Shell (KSH)</li> </ul>
<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>If the operating system is RHEL, install the package <code>lsb_release</code> with one of the following commands by logging in as root user: <ul style="list-style-type: none"> <li><code>yum install redhat-lsb-core</code></li> <li><code>yum install redhat-lsb</code></li> </ul> </li> </ul>	
<p><b>Java Runtime Environment</b></p>	
Oracle Linux / Red Hat Enterprise Linux	<ul style="list-style-type: none"> <li>Oracle Java Runtime Environment (JRE) 1.7.x - 64 bit</li> </ul>
<p><b>Oracle Database Server and Client</b></p>	
<ul style="list-style-type: none"> <li>Oracle Database Server Enterprise Edition 11g Release 2 (11.2.0.3.0+) - 64 bit RAC/ Non-RAC with/ without partitioning option</li> <li>Oracle Database Server Enterprise Edition 11g Release 2 (11.2.0.4.0 +) - 64 bit RAC/Non-RAC with/ without partitioning option, Advanced Security Option**</li> <li>Oracle Database Server 12c Release 2 (12.2.0.1+)</li> <li>Enterprise Edition with Oracle Database client 12c Release 1 (v12.1.0.1+)</li> <li>Oracle Client 11g Release 2 (11.2.0.3.0+) - 64 bit</li> <li>Oracle Client 12c Release 1 (12.1.0.1+) - 64 bit</li> <li>Oracle 11g Release 2 (11.2.0.3+) JDBC driver (Oracle thin driver)</li> <li>Oracle 12C Release 1 (12.1.0.1+) JDBC driver (Oracle thin driver)</li> </ul>	
<p><b>Note:</b></p> <p>Ensure that the following patches are applied:</p> <ul style="list-style-type: none"> <li>Oracle Server 12c, v12.1.0.1 -17082699</li> <li>Oracle Server 12c, v12.1.0.2 - 20698050</li> <li>Also for latest information, see <a href="http://support.oracle.com/">http://support.oracle.com/</a> , 12.1.0.2 Bundle Patches for Engineered Systems and DB In-Memory - List of Fixes in each Bundle (Doc ID 1937782.1)</li> <li>Oracle R Enterprise 1.4 requires Oracle Database Enterprise Edition 11.2.0.3/ 11.2.0.4/ 12.1.0.1</li> </ul>	
<p><b>OLAP</b></p>	
Oracle Hyperion Essbase	<ul style="list-style-type: none"> <li>V 11.1.2.1+ (Server and Client) with Oracle 11g Database</li> <li>V 11.1.2.3+ (Server and Client) with Oracle 12c Database</li> </ul>
Oracle OLAP	<ul style="list-style-type: none"> <li>V 11.2.0.3+ with Oracle 11g Database</li> <li>V 12.1.0.1+ with Oracle 12c Database</li> </ul>
<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>Oracle Hyperion Essbase and Oracle OLAP is required only if you are using the OLAP feature of OFSAAI. For Oracle OLAP, ensure that you have configured the Oracle Database server with OLAP option.</li> </ul>	

**Table 2–2 (Cont.) Configurations Supported for Java 7**

<b>Web server/ Web application server</b>	
Oracle Linux / Red Hat Enterprise Linux / IBM	Oracle HTTP Server 11.1.1.1/ Apache HTTP Server 2.2.x/ IBM HTTP Server <ul style="list-style-type: none"> <li>• Oracle WebLogic Server 12.1.x and 12.2.x - 64 bit</li> <li>• IBM WebSphere Application Server 8.5.5.9+ (Full Profile) with IBM Java Runtime - 64 bit</li> <li>• Apache Tomcat 8.0.x - 64 bit</li> </ul>
<b>Note:</b>	
<ul style="list-style-type: none"> <li>• OFSAA Infrastructure web component deployment on Oracle WebLogic Server with Oracle JRockit is not supported.</li> </ul>	
<b>Desktop Requirements</b>	
Operating System	MS Windows 7 / Windows 8/ Windows 10
Browser	Microsoft Internet Browser 11.x Chrome 57.x Firefox 52.x Turn off Pop-up blocker settings. For more information, see <a href="#">Configuring Internet Explorer Settings</a>
Office Tools	<ul style="list-style-type: none"> <li>• MS Office 2007/2010/2013</li> <li>• Adobe Acrobat Reader 8 or above</li> </ul>
Screen Resolution	1280*1024
<b>Other Software</b>	
Directory Services	OFSAAI is qualified on both OPEN LDAP 2.2.29+ and Oracle Internet Directory v 11.1.1.3.0. However, it can be integrated with other directory services software such as MS Active Directory.
<b>Note:</b>	
<ul style="list-style-type: none"> <li>• Configuration of Directory services software for OFSAAI installation is optional. For more information on configuration, see <a href="#">Setting Infrastructure LDAP Configuration</a>.</li> <li>• Open LDAP must be installed on MS Windows Server machine.</li> </ul>	

## Configurations supported for Java 8

**Table 2–3 Configurations Supported for Java 8**

<b>Operating System</b>	
Oracle Linux / Red Hat Enterprise Linux (x86-64)	<ul style="list-style-type: none"> <li>• Oracle Linux Server release 6.1 and above - 64 bit</li> <li>• Oracle Linux Server release 7.1 and above - 64 bit</li> </ul> <b>Note:</b> Same version of RHEL is supported
Oracle Solaris (SPARC) IBM AIX (POWERPC) Solaris (X86)	<ul style="list-style-type: none"> <li>• v5.11 update 3 and above - 64 bit</li> <li>• AIX 7.1 (TL 09 and above) - 64 bit</li> <li>• 5.11 update 3 and above - 64 bit</li> </ul>
Shell	KORN Shell (KSH)

**Table 2–3 (Cont.) Configurations Supported for Java 8**

<b>Note:</b>	
<ul style="list-style-type: none"> <li>If the operating system is RHEL, install the package <code>lsb_release</code> with one of the following commands by logging in as root user: <ul style="list-style-type: none"> <li><code>yum install redhat-lsb-core</code></li> <li><code>yum install redhat-lsb</code></li> </ul> </li> </ul>	
<b>Java Runtime Environment</b>	
Oracle Linux / Red Hat Enterprise Linux	<ul style="list-style-type: none"> <li>Oracle Java Runtime Environment (JRE) 1.8.x - 64 bit</li> </ul>
<b>Oracle Database Server and Client</b>	
<p>Oracle Database Server Enterprise Edition 11g Release 2 (11.2.0.3.0+) - 64 bit RAC/ Non-RAC with/ without partitioning option</p> <p>Oracle Database Server Enterprise Edition 12c Release 1 (12.1.0.1+)- 64 bit RAC/ Non-RAC with/ without partitioning option</p> <ul style="list-style-type: none"> <li>Oracle Database Server 12c Release 2 (12.2.0.1+)</li> <li>Enterprise Edition with Oracle Database client 12c Release 1 (v12.1.0.1+)</li> <li>Oracle Client 11g Release 2 (11.2.0.3.0+) - 64 bit</li> <li>Oracle Client 12c Release 1 (12.1.0.1.0+) - 64 bit</li> <li>Oracle 11g Release 2 (11.2.0.3+) JDBC driver (Oracle thin driver)</li> <li>Oracle 12C Release 1 (12.1.0.1+) JDBC driver (Oracle thin driver)</li> </ul>	
<b>Note:</b>	
<p>Ensure that the following patches are applied:</p> <ul style="list-style-type: none"> <li>Oracle Server 12c, v12.1.0.1 - 17082699</li> <li>Oracle Server 12c, v12.1.0.2 - 20698050</li> <li>Also for latest information, see <a href="http://support.oracle.com/">http://support.oracle.com/</a> , 12.1.0.2 Bundle Patches for Engineered Systems and DB In-Memory - List of Fixes in each Bundle (Doc ID 1937782.1)</li> <li>Oracle R Enterprise 1.4 requires Oracle Database Enterprise Edition 11.2.0.3/ 11.2.0.4/ 12.1.0.1</li> <li>To configure the Oracle Database 19c Server and Client on a new installation, see MOS DocID: <a href="#">2691006.1</a>.</li> <li>To configure the Oracle Database 19c Server and Client on an existing installation, see MOS DocID: <a href="#">2699715.1</a>.</li> </ul>	
<b>OLAP</b>	
Oracle Hyperion Essbase	<ul style="list-style-type: none"> <li>V 11.1.2.1+ (Server and Client) with Oracle 11g Database</li> <li>V 11.1.2.3+ (Server and Client) with Oracle 12c Database</li> </ul>
Oracle OLAP	<ul style="list-style-type: none"> <li>V 11.2.0.3+ with Oracle 11g Database</li> <li>V 12.1.0.1+ with Oracle 12c Database</li> </ul>
<b>Note:</b>	
<ul style="list-style-type: none"> <li>Oracle Hyperion Essbase and Oracle OLAP is required only if you are using the OLAP feature of OFSAAI. For Oracle OLAP, ensure that you have configured the Oracle Database server with OLAP option.</li> </ul>	
<b>Web server/ Web application server</b>	



**Table 2–3 (Cont.) Configurations Supported for Java 8**

Oracle Linux / Red Hat Enterprise Linux/ IBM	Oracle HTTP Server 11.1.1.1/ Apache HTTP Server 2.2.x/ IBM HTTP Server <ul style="list-style-type: none"> <li>• Oracle WebLogic Server 12.1.x and 12.2.x - 64 bit</li> <li>• IBM WebSphere Application Server 8.5.5.9+ with bundled IBM Java Runtime - 64 bit</li> <li>• Apache Tomcat 8.0.x - 64 bit</li> </ul>
<b>Note:</b> <ul style="list-style-type: none"> <li>• OFSAA Infrastructure web component deployment on Oracle WebLogic Server with Oracle JRockit is not supported.</li> <li>• For deployment on Oracle WebLogic Server 12.1.3+ (64 bit) with Java 8, download and install patch 18729264 from <a href="http://support.oracle.com/">http://support.oracle.com/</a>.</li> </ul>	
<b>Desktop Requirements</b>	
Operating System	MS Windows 7 / Windows 8/ Windows 10
Browser	Microsoft Internet Browser 11.x Chrome 57.x Firefox 52.x Turn off Pop-up blocker settings. For more information, see <a href="#">Configuring Internet Explorer Settings</a>
Office Tools	<ul style="list-style-type: none"> <li>• MS Office 2007/2010/2013</li> <li>• Adobe Acrobat Reader 8 or above</li> </ul>
Screen Resolution	1024*768 or 1280*1024
<b>Other Software</b>	
Directory Services	OFSAAI is qualified on both OPEN LDAP 2.2.29+ and Oracle Internet Directory v 11.1.1.3.0. However, it can be integrated with other directory services software such as MS Active Directory.
<b>Note:</b> <ul style="list-style-type: none"> <li>• Configuration of Directory services software for OFSAAI installation is optional. For more information on configuration, see <a href="#">Setting Infrastructure LDAP Configuration</a>.</li> <li>• Open LDAP must be installed on MS Windows Server machine.</li> </ul>	

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**Note:** To upgrade an existing OFSAA 8.0.x Java 7 instance to Java 8, see [Appendix P](#).

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**Table 2–4** provides the recommended software combinations for OFS ECM Application Pack deployment.

**Table 2–4 Recommended Software Combinations**

Operating System	Database	Web application server	Web server
Oracle Linux 5.3 up to 5.10/ 6.0 and above	Oracle Database	Oracle WebLogic Server /Apache Tomcat Server	Oracle HTTP Server/ Apache HTTP Server
Oracle Solaris 5.10/ 5.11	Oracle Database	Oracle WebLogic Server /Apache Tomcat Server	Oracle HTTP Server/ Apache HTTP Server

## Verifying System Environment

To verify your system environment meets the minimum requirements for the installation, a Pre-Install Check utility is available within the Install Kit archive file. This utility can also be obtained separately by contacting Oracle Support Services.

Though the system environment verification is an integral and automated part of the installation of this software product, Oracle strongly recommends running this utility prior to beginning the installation as part of your organization's "Installation Readiness Verification Process".

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**Note:** For more details on download and usage of this utility, see Oracle Financial Services Analytical Applications Infrastructure Environment Check Utility Guide given in the [Related Documents](#) section.

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## Understanding the Installation Mode

The following modes of installation are available for the OFS ECM Application Pack.

- [Installing in Silent Mode](#)

## Installing in Silent Mode

This mode mandates updating the installation configuration files with required details and performs installation in a "Silent" non user interactive format.

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## Preparing for Installation

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### Note:

- Starting from version 8.0.5.0.0, OFS ECM is available as a standalone application. If OFS ECM has to be installed with another FCCM application, ensure that you install both the applications on same schema/infodm.
  - Release 8.0.7.0.0 of Oracle Financial Services Enterprise Case Management is not fully backward compatible with earlier versions of FCCM applications. You must upgrade all of your FCCM applications from existing 8.0.x versions to 8.0.7.0.0 version and cannot choose to upgrade only selective application packs to v8.0.7.0.0. However, there is one exception in regards to ECM and AML BDF. Previous version of AML BDF can be used with the latest version of ECM but the client will need to update the data model of AML BDF and make necessary additions to DM utility and batch processes on ECM.
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This chapter provides necessary information to review before installing the Oracle Financial Services Enterprise Case Management (OFS ECM) Application Pack v8.0.7.0.0.

This chapter includes the following topics:

- [Installer and Installation Prerequisites](#)
- [Obtaining Software](#)
- [Performing Common Pre-Installation Tasks](#)

### Installer and Installation Prerequisites

[Table 3-1](#) provides the list of prerequisites required before beginning the installation for OFS ECM application. The Environment Check utility notifies you if any requirements are not met.

**Table 3–1 Prerequisite Information**

Category	Sub-Category	Expected Value
Environment Settings	User Permission	User to have 755 permission on the directory identified for installation (FIC_HOME). <b>Note:</b> User to have 755 permission on the .profile file
	Java Settings	<ul style="list-style-type: none"> <li>• PATH in .profile file must be set to include the Java Runtime Environment absolute path. The path should include Java version (7 or 8) based on the configuration.</li> </ul> <b>Note:</b> <ul style="list-style-type: none"> <li>• Ensure that the absolute path to JRE/bin is set at the beginning of PATH variable.</li> <li>• For example, PATH=/usr/java/jre1.7/bin:\$ORACLE_HOME/bin:\$PATH</li> <li>• Ensure that no SYMBOLIC links to JAVA installation are not set in the PATH variable</li> </ul>
	Oracle Database Settings	<p><b>Oracle Database Server</b></p> <ul style="list-style-type: none"> <li>• TNS_ADMIN must be set in .profile file pointing to appropriate tnsnames.ora file.</li> <li>• Enable Transparent Data Encryption (TDE) and/ or Data Redaction**</li> </ul> <p>For more information, see <a href="#">Appendix R, "Configuring Transparent Data Encryption (TDE) and Data Redaction in OFSAA"</a>.</p> <p><b>OFSAA Processing Server</b></p> <ul style="list-style-type: none"> <li>• ORACLE_HOME must be set in .profile file pointing to appropriate Oracle DB Client installation.</li> <li>• PATH in .profile file must be set to include appropriate \$ORACLE_HOME/bin path.</li> <li>• Ensure that an entry (with SID/ SERVICE NAME) is added in the tnsnames.ora file on the OFSAA server.</li> </ul>

**Table 3–1 (Cont.) Prerequisite Information**

Category	Sub-Category	Expected Value
OS/File System Settings	OS Level Settings	<p>You must set your locale to UTF-8 locale (LANG, NLS_LANG to be set in.profile). Specifying a locale depends on your data and the operating system installed on your system.</p> <p>For example,</p> <ul style="list-style-type: none"> <li>For Linux OS: export LANG=en_US.utf8</li> </ul> <p>You can determine the locale on your system using the locale -a command</p> <pre>export NLS_LANG=AMERICAN_ AMERICA.AL32UTF8</pre>
	File Descriptor Settings	Greater than 15000
	Total Number of Process Settings	Greater than 4096
	tmp space	Prior to installation, ensure that sufficient free temp space (minimum 1 GB free) is available in /tmp directory of unix server hosting OFSECM.
	Port Settings	Default port numbers to be enabled on the system are 6500, 6501, 6505, 6507, 6509, 6510, 6666, 9999, and 10101.
	Staging Area/ Metadata Repository	<p>A directory to hold the application metadata artifacts and additionally act as staging area.The directory should exist on the same system as the OFSAA Infrastructure (can be configured on different mount). However, the owner of the installation directory mentioned above should have RWX (read, write, and execute) permissions on this folder.</p> <p>Set 775 permission on this folder.</p> <p><b>Note:</b> This directory is also referred as FTPSHARE folder.</p>
	Installation Directory	<p>A directory where the product files will be installed.</p> <p>Assign User permission to 755 on the installation directory.</p>
	Temporary Directory	<p>Default temporary directory where installation files are stored for a short period of time to support faster installation.</p> <ul style="list-style-type: none"> <li>For installation on UNIX OS, your UNIX administrator must give you the required read-write permissions for the <i>/tmp</i> directory and disable the NOEXEC option</li> <li>Configure adequate space on the <i>/tmp</i> directory. It is recommended that you allocate more than 10 GB of space.</li> </ul> <p><b>Note:</b> If NOEXEC is enabled, the extraction of files by the installer into the <i>/tmp</i> directory is prevented and the binaries will not execute in the directory, which will fail the installation.</p>
Download Directory	<p>A directory where the product installer file will be downloaded/ copied.</p> <p>Ensure user permission is set to 755 on the Download directory.</p>	

**Table 3–1 (Cont.) Prerequisite Information**

Category	Sub-Category	Expected Value
Database Settings	Database Instance Settings	<ul style="list-style-type: none"> <li>NLS_CHARACTERSET to be AL32UTF8</li> <li>NLS_LENGTH_SEMANTICS to be BYTE</li> <li>AVAILABLE OPEN CURSORS limit to be greater than 4096</li> </ul> <p>For an Oracle Database installation, set your Oracle NLS_LANG environment variable to an appropriate UTF-8 character set.</p> <p>For example, setenv NLS_LANG AMERICAN_AMERICA.AL32UTF8</p> <p><b>Note:</b> For other database tunable parameters required for OFS ECM, see <a href="#">Appendix S, "Tunable Database Parameters"</a>. Ensure that the OLAP_USER role is available in the database.</p>
Web application server	WebSphere/ WebLogic/ Tomcat	<p>Web application server should be installed and profile/domain created.</p> <p>You are prompted to enter the WebSphere Profile path, WebLogic Domain path, or Tomcat Deployment path during OFSAI installation.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>See <a href="#">Appendix A</a> for WebSphere Profile and WebLogic Domain creation.</li> <li>For deployment on Oracle WebLogic Server 12.1.3+ (64 bit) with Java 8, download and install 18729264 from <a href="http://support.oracle.com/">http://support.oracle.com/</a>.</li> </ul>
Web server	Apache HTTP Server/ Oracle HTTP Server/ IBM HTTP Server.	<p>This is an optional requirement. HTTP Server Installation to be present. You are prompted to enter the Web server IP/Hostname and Port details during installation.</p> <p><b>Note:</b> See <a href="#">Appendix A</a> for Web server installation.</p>
Operating System	Solaris 11  Solaris 10	<p>Upgrade to Oracle Solaris 11.3 with SRU09 or higher. See <a href="https://docs.oracle.com/cd/E53394_01/html/E54845/index.html">https://docs.oracle.com/cd/E53394_01/html/E54845/index.html</a> to upgrade to SRU09 if you have a lower SRU version. Additionally, install the required runtime libraries. For more information, see <a href="#">Installing Only the Runtime Libraries on Oracle Solaris 11</a>.</p> <p>Install the required OS patches. For more information, see <a href="#">Installing the Required Oracle Solaris 10 Patches</a>. Additionally, install the required runtime libraries. For more information, see <a href="#">Installing Only the Runtime Libraries on Oracle Solaris 10</a>.</p> <p><b>Note:</b> Before you install the OFS ECM Application pack, ensure that all the dependency packs have been upgraded to 8.0.7.0.0 version.</p>
OFS AAI	One-off	<p>Apply the consolidated one-off patch 29004093 before deployment from My Oracle Support <a href="http://support.oracle.com/">http://support.oracle.com/</a></p>
OFS TBAML	One-off	<p>If user wants to run the TBAML batch on standalone/Upgraded 8.0.7, then apply mandatory patch 29289804.</p>

**Table 3–1 (Cont.) Prerequisite Information**

Category	Sub-Category	Expected Value
Backup Tables	Table Names	Before starting the installation and post installation, ensure there are no Backup tables created manually with table names suffixed with <code>_BKP</code> or <code>_TEMP</code> .  Note: Table names with <code>_BKP</code> and <code>_TEMP</code> that are created outside the application will cause installation/patch application to fail.

## Obtaining Software

The 8.0.7.0.0 release of OFS ECM Application Pack can be downloaded from My Oracle Support (<https://support.oracle.com/>). You must have a valid Oracle account to download the software.

## Performing Common Pre-Installation Tasks

The common pre-installation activities that you must carry out before installing the OFS ECM Application Pack are:

- [Identifying the Installation, Download and Metadata Repository](#)
- [Downloading and Copying the OFS ECM Application Pack Installer](#)
- [Extracting the Software](#)
- [Setting Up Web application server](#)

### Identifying the Installation, Download and Metadata Repository

To install OFSAA Application packs, create the following directories:

- **OFS ECM Download Directory (Optional)** - Create a download directory and copy the OFS ECM Application Pack Installer File (archive). This is the directory where the downloaded installer/patches can be copied.
- **OFS ECM Installation Directory (Mandatory)** - Create an installation directory and copy the installation files. Perform the installation from this directory. Set the variable `FIC_HOME` variable in the `.profile` file to point to the OFS ECM Installation Directory.
- **OFS ECM Staging/Metadata Directory (Mandatory)** - Create a Staging/Metadata Directory to copy data loading files, save data extracts and so on. Additionally, this directory also maintains the OFSAA metadata artifacts. This directory is also referred to as "FTP SHARE".

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**Note:**

Assign 755 user permission to the Installation and Download Directory.

Assign 755 user permission to the Staging Directory.

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### Downloading and Copying the OFS ECM Application Pack Installer

To download and copy the OFS ECM Application Pack Installer, follow these steps:

1. To download the OFS ECM Application Pack, log in to My Oracle Support (<https://support.oracle.com/>) with a valid Oracle account.

- Download the mandatory installer one-off patch **29008204** from My Oracle Support.
2. Download the mandatory one-off patch 29965853 from <http://support.oracle.com/>.
  3. Download the installer archive into the Download Directory (in Binary mode) in the setup identified for OFS ECM installation.

## Extracting the Software

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**Note:**

You must be logged in to the UNIX operating system as a non-root user.

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1. Download the unzip utility (OS specific) `unzip_<os>.Z` and copy it in Binary mode to the directory that is included in your PATH variable. If you already have the unzip utility to extract the contents of the downloaded archive, skip this step.
2. Uncompress the unzip installer file with the command:

```
uncompress unzip_<os>.Z
```

---

---

**Note:**

If an error message "uncompress: not found [No such file or directory]" is displayed when the package is not installed, contact your UNIX administrator.

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3. Assign EXECUTE permission to the file with the command:  

```
chmod 751 unzip_<OS>
```

For example, `chmod 751 unzip_sparc`
4. Extract the contents of the OFS ECM Application Pack 8.0.7.0.0 installer archive file in the download directory with the following command:

```
unzip OFS_ECM_PACK.zip
```

---

---

**Note**

Do not rename the Application Pack installer folder name on extraction from the archive.

---

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5. Navigate to the download directory and assign execute permission to the installer directory with the following command:  

```
chmod -R 755 OFS_ECM_PACK
```
6. Extract and apply the patch 29965853. See the Readme available with the patch for further instructions on installing the patch.

## Setting Up Web application server

For setting up the environment based on your selected Web application server, see [Configuring Web application servers](#).



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## Installing OFS ECM Application Pack

This chapter describes the steps to be followed to install the OFS ECM Application pack depending on the offline and online modes of installation.

**Note:** If you are installing an Application Pack on an environment, where another Applications Pack is already installed, you may sometimes get a warning message such as *Object Already Exists*. This message can be ignored.

This chapter includes the following sections:

- [About Schema Creator Utility](#)
- [Configuring and Executing Schema Creator Utility](#)
- [Installing the OFS ECM Application Pack](#)
- [Verifying Installation](#)

### About Schema Creator Utility

Creating database users/schemas is one of the primary steps in the complete OFS ECM installation. This release of OFSAA provides a utility to quickly get started with the OFSAA 8.0.7.0.0 installation by allowing easier and faster creation of database User(s)/ Schema(s), assign the necessary GRANT(s), and so on. Additionally, it also creates the required entities in the schemas and so on.

The schema creator utility must be configured and executed before installation of any OFSAA Application Pack.

This section includes the following topics:

- [Configuring Schema Creator Utility](#)
- [Selecting Execution Modes in Schema Creator Utility](#)
- [Selecting Execution Options in Schema Creator Utility](#)

### Configuring Schema Creator Utility

The schema creator utility should be configured and executed mandatorily every time prior to installation of any OFSAA Applications Pack.

The types of schemas that can be configured are:

- **CONFIG** - This schema holds the entities and other objects required for OFSAA setup configuration information.

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**Note:** There can be only one CONFIG schema per OFSAA instance.

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- **ATOMIC** - This schema holds the data model entities. One ATOMIC schema is attached to one Information Domain.

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**Note:** There can be multiple ATOMIC schemas per OFSAA Instance and an Information Domain can have only one ATOMIC schema.

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## Selecting Execution Modes in Schema Creator Utility

Schema creator utility supports the following modes of execution:

- **Online Mode:** In this mode, the utility connects to the database and executes the Data Definition Language (DDL) for User, Entities, and GRANTS.

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**Note:** To execute the utility in Online mode, you need to connect as "<User> AS SYSDBA".

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- **Offline Mode:** In this mode, the utility generates an SQL script with all the required DDLs for User, Entities and GRANTS. This script must be executed by the DBA on the appropriate database identified for OFSAA usage.

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**Note:** For running the sql script generated in offline mode, the script should reside in the same directory where the 'SQLScripts' directory is available.

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**Note:**

1. To execute the utility in Offline mode, you must connect as a user with the following GRANTS (alternatively, you can also connect as a user with SYSDBA privileges):
    - SELECT ON DBA\_ROLES
    - SELECT ON DBA\_USERS
    - SELECT ON DBA\_DIRECTORIES
    - SELECT ON DBA\_TABLESPACES
    - CREATE SESSION
  2. Do not modify the OFS\_ECM\_SCHEMA\_OUT.XML file generated after the execution of this utility
  3. If there are any errors during the SQL script execution, reconfigure the OFS\_ECM\_SCHEMA\_IN.xml file and execute the utility. This regenerates the scripts with corrected information. For more information, see [Configuring OFS\\_ECM\\_SCHEMA\\_IN.xml File](#).
  4. Do not modify the OFS\_ECM\_SCHEMA\_OUT.XML file generated after the execution of this utility.
  5. Do not keep any backup files of xml's in the download directory.
- 
-

## Selecting Execution Options in Schema Creator Utility

Depending on the option selected to run the OFSAA Applications Pack installer, you must select the appropriate schema creator utility execution option. To run the OFSAA Applications Pack installer in Silent mode, it is mandatory to execute the schema creator utility with `-s` option.

## Configuring and Executing Schema Creator Utility

This section includes the following topics:

- [Prerequisites](#)
- [Configuring Schema Creator Utility](#)
- [Executing the Schema Creator Utility](#)
- [Verifying the Schema Creator Log Files](#)

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**Note:** If you intend to use Oracle OLAP feature, execute the below grant on all ATOMIC schema(s): `grant olap_user to &database_username.`

---

---

### Prerequisites

The prerequisites you must have before configuring the Schema Creator Utility are:

- Oracle User ID/Password with SYSDBA privileges
- JDBC Connection URL for RAC/Non RAC database
- HOSTNAME/IP of the server on which OFSAA is being installed.
- TNSNames.ora should have entry for the database planning to install the Database objects.
- For enabling Transparent Data Encryption (TDE) in your OFSAA instance during installation, perform the steps explained in the [Appendix R, "Configuring Transparent Data Encryption \(TDE\) and Data Redaction in OFSAA"](#).

### Configuring Schema Creator Utility

This section explains the steps to configure the Schema Creator Utility.

---

---

**Note:** The extracted media pack folder name must not be changed.

---

---

To configure the Schema Creator Utility, follow these steps:

1. Log in to the system as non-root user.
2. Navigate to the following path: `OFS_ECM_PACK/schema_creator/conf` directory.
3. Edit the `OFS_ECM_SCHEMA_IN.xml` file in a text editor.
4. Configure the following elements as described in the section [Configuring OFS\\_ECM\\_SCHEMA\\_IN.xml File](#):
5. Save the `OFS_ECM_SCHEMA_IN.xml` file.

---

---

**Note:** On successful execution of the utility, the entered passwords in the `OFS_ECM_SCHEMA_IN.xml` file are nullified.

Do not clean up the `OFS_ECM_SCHEMA_OUTPUT.XML` file post-installation as it would be required in future patch installations and upgrades.

---

---

---

---

**Note:** While editing the `OFS_ECM_SCHEMA_IN.xml`, ensure only the values/tag attributes mentioned in must be modified and none of other tags should be modified.

Do not modify the following list of attributes:

- `APP_PACK_ID`
  - `SCHEMA.APP_ID`
  - `SCHEMA.DEFAULTTABLESPACE`
  - `SCHEMA.TYPE`
  - `TABLESPACE.NAME`
- 
- 

## Executing the Schema Creator Utility

You can execute the schema creator utility in Online mode or Offline mode. This section includes the following topics:

- [Executing the Schema Creator Utility in Online Mode](#)
- [Executing the Schema Creator Utility in Offline Mode](#)
- [Executing the Schema Creator Utility with -s Option](#)
- [Executing the Schema Creator Utility while Installing Subsequent Applications Pack](#)

### Executing the Schema Creator Utility in Online Mode

In Online mode, the Schema Creator Utility creates all the Schemas, Schema Objects, Tablespaces, Grants, and Roles in the database during the execution process.

To execute the Schema Creator Utility in Online mode, follow these steps:

1. Log in to the system as non-root user.
2. Navigate to the following path: `OFS_ECM_PACK/schema_creator/bin/`
3. Execute the `osc.sh` file using the following command:  

```
./osc.sh
```
4. The following message is displayed: *You have chosen ONLINE mode. Triggering the utility in ONLINE mode will execute the DDLs directly on the Database. Do you wish to proceed? (Y/y or N/n).*
5. Enter `Y/ y` to proceed with the script generation.
6. Enter the DB Username with SYSDBA Privileges. For example: `SYS` as `SYSDBA`.
7. Enter the User Password.

Figure 4–1 Schema Creation - Online Mode

```

/scratch/ofsaadb/installer/OFS_ECM_PACK/schema_creator/bin>ls
osc.sh
/scratch/ofsaadb/installer/OFS_ECM_PACK/schema_creator/bin>./osc.sh -s
.profile executed
=====
You have chosen ONLINE mode
=====
Triggering the utility in ONLINE mode will execute the DDLs directly on the Database. Do you wish to proceed? (Y/N) :
y
=====
Java Validation Started ...
Java found in : /scratch/ofsaadb/jrel.7.0_80/bin
JAVA Version found : 1.7.0_80
JAVA Bit Version found : 64-bit
Java Validation Completed. Status : SUCCESS
=====
DB specific Validation Started ...
Enter the DB User Name With SYSDBA Privileges:
sys as sysdba
Enter the User Password:
Oracle Client version : 12.1. Status : SUCCESS
Oracle Server version Current value : 11.2.0.3.0. Status : SUCCESS
DB specific Validation Completed. Status : SUCCESS
=====
Schema Creation Started
=====
Checking OFSAA installation...
OFSAA installation not found.
Validating the dat file OFS_ECM_CFG.dat started...
Successfully validated OFS_ECM_CFG.dat file
Validating the input XML file.../scratch/ofsaadb/installer/OFS_ECM_PACK/schema_creator/conf/OFS_ECM_SCHEMA_IN.xml
Input XML file validated successfully.
=====
Validating Connection URL ...jdbc:oracle:thin:@ofss2221324.in.oracle.com:1521:T14011L64
Successfully connected to User - sys as sysdba URL - jdbc:oracle:thin:@ofss2221324.in.oracle.com:1521:T14011L64
Connection URL successfully validated...
localhost name - whf00aeb.in.oracle.com IPAddress - 10.184.154.121
Parsing TABLESPACE tags...
You have chosen to install this Application Pack on "ecm_atm_805" ATOMIC schema. Do you want to proceed? (Y/N)
y
You have chosen to install this Application Pack on INFODOM "ecminfod". Do you want to proceed? (Y/N)
y
=====
Executing TableSpace Scripts started...
Skipping the creation of tablespace IDX_CM_TBSP
Skipping the creation of tablespace DATA_CONF_TBSP
Skipping the creation of tablespace DATA_CM_TBSP
=====
Creating Schemas started...
CONFIG User ecm_conf_805 successfully created on Default TableSpace : DATA_CONF_TBSP on Temp TableSpace : TEMP
Grants creation scripts execution started...
Grants creation scripts execution completed...
Successfully connected to User - ecm_conf_805 URL - jdbc:oracle:thin:@ofss2221324.in.oracle.com:1521:T14011L64
Scripts execution for CONFIG schema started ...
Scripts execution for CONFIG schema completed ...
User ecm_conf_805 details updated into the dbmaster table
User ecm_conf_805 details updated into the I18NMASTER table
User ecm_conf_805 details updated into the aai_db_detail table
User ecm_conf_805 details updated into the aai_db_auth_alias table

```

---

**Note:** On successful execution of Schema Creator utility, the console displays the following status message:

*Schema Creator executed successfully. Please proceed with the installation.*

See log file in OFS\_ECM\_PACK/schema\_creator/logs directory for execution status. If there are any errors, contact Oracle Support Services.

---

## Executing the Schema Creator Utility in Offline Mode

In Offline Mode, the Schema Creator Utility creates an output in the SQL file format. This script must be executed manually by logging as database user with SYSDBA privileges. The SQL file contains the creation of Schemas, Schema Objects, and Roles.

### Prerequisites:

To execute the utility in Offline mode, you must connect a database user with the following GRANTS (Alternatively, you can also connect as a user with SYSDBA privileges):

- SELECT ON DBA\_ROLES
- SELECT ON DBA\_USERS

- SELECT ON DBA\_DIRECTORIES
- SELECT ON DBA\_TABLESPACES
- CREATE SESSION

---

---

**Note:** Explicit GRANTS to the user are required. GRANTS assigned through Roles are not supported

---

---

To execute the schema creator utility in Offline mode, follow these steps:

1. Log in to the system as non-root user.
2. Navigate to OFS\_ECM\_PACK/schema\_creator/bin directory.
3. Execute the osc.sh file using the following command:  

```
./osc.sh -o
```
4. Enter Y /y to generate the script.
5. The following message is displayed: *You have chosen OFFLINE mode. Triggering the utility in OFFLINE mode will generate the script. Do you wish to proceed? (Y/y or N/n).*
6. Enter the DB Username with SELECT privileges.
7. Enter the User Password.

**Figure 4–2 Schema Creation - Offline Mode**

```
$ ./osc.sh -o
=====
You have chosen OFFLINE mode
=====
Triggering the utility in OFFLINE mode will generate the script. Do you wish to proceed? (Y/y or N/n):
y
=====
Java Validation Started ...
Java found in : /scratch/ofsaa/jdk1.6.0_25/jre/bin
JAVA Version found : 1.6.0_25
JAVA Bit Version found : 64-bit
Java Validation Completed. Status : SUCCESS
=====
DB specific Validation Started ...
Enter the DB User Name with SELECT privileges on following tables
1. DBA_ROLES
2. DBA_USERS
3. DBA_DIRECTORIES
4. DBA_TABLESPACES
sys as sysdba
Enter the User Password:
Oracle Client version : 11.2.0.3.0. Status : SUCCESS
Oracle Server version Current value : 11.2.0.3.0. Status : SUCCESS
DB specific Validation Completed. Status : SUCCESS
```

8. The console runs the initial validation checks and displays the following message: *You have chosen to install this Applications Pack on <Name of the Atomic Schema>ATOMIC schema. Do you want to proceed? (Y/N).*
9. Enter Y/y to start the script generation. The following message is displayed. *You have chosen to install this Applications Pack on <Name of the Infodom>. Do you want to proceed? (Y/N).*

---



---

**Note:** On successful execution of schema creator utility, the console displays the following status message:

**Success.** Please execute `OFS_ECM_PACK/schema_creator/sysdba_output_scripts.sql` *before proceeding with the installation.*

---



---

**Figure 4–3 Schema Creation - Offline Mode**

```

All the prechecks execution completed successfully.
=====
Generating TableSpace creation Scripts started...
Generating TableSpace creation Scripts completed...
=====
Generating Schema creation scripts started...
CONFIG User dev_conf14 creation script generated successfully on Default TableSpace : USERS on Temp TableSpace : TEMP
Generation of grants creation scripts started...
Generation of grants creation scripts completed...
Scripts Generation for CONFIG schema started ...
Scripts Generation for CONFIG schema completed ...
User dev_conf14 details updated into the dbmaster table
User dev_atm14 details updated into the dbmaster table
User dev_atm14 creation script generated successfully on Default TableSpace : USERS on Temp TableSpace : TEMP
User dev_atm14 creation is skipping as the user is already created.
Generating Schema creation scripts completed...
=====
Generating Roles creation Scripts started...
Generating Roles creation Scripts completed...
=====
Generating Grants creation scripts started...
Generating Grants creation scripts completed...
=====
Generating Schema Creation Scripts Completed
=====

```

**10.** Navigate to the directory:

`OFS_ECM_PACK/schema_creator`

**11.** Open the `sysdba_output_scripts.sql` file and modify `SET PAGESIZE 0 FEEDBACK OFF VERIFY OFF HEADING OFF ECHO OFF` to `SET PAGESIZE 0 FEEDBACK OFF VERIFY OFF HEADING OFF ECHO OFF SQLBLANKLINES ON`.

**12.** Login to SQLPLUS with a user having SYSDBA Privileges.

**13.** Connect to the Oracle DB Server on which the OFS ECM Application Pack installation is to be performed and execute the `sysdba_output_scripts.sql` file using the following command:

`SQL>@sysdba_output_scripts.sql`

**Figure 4–4 Schema Creator - Offline Mode**

```

Enter user-name: sys/oracle123456789010101 as sysdba

Connected to:
Oracle Database 12c Enterprise Edition Release 12.1.0.2.0 - 64bit Production
With the Partitioning, OLAP, Advanced Analytics and Real Application Testing options

SQL> @sysdba_output_scripts.sql

Warning: Package Body created with compilation errors.

Disconnected from Oracle Database 12c Enterprise Edition Release 12.1.0.2.0 - 64bit Production
With the Partitioning, OLAP, Advanced Analytics and Real Application Testing options
$ █

```

Alternatively, you can copy the `sysdba_output_scripts.sql` file and `SQLScripts` directory to a remote server and execute `sysdba_output_scripts.sql` file.

---



---

**Note:** See log `sysdba_output_scripts.log` file for execution status. If there are any errors, contact Oracle Support Services. SQL Scripts folder and SQL file should reside in the same folder.

---



---

14. Once the above file gets executed, a warning is displayed as shown in the above screen.
15. Run the following scripts in config schema:
  1. Navigate to the `<OFS_ECM_PACK>/schema_creator/SQLScripts/oracle` folder.
  2. Connect to the config schema through `sqlplus`
  3. Execute the `@compile_objects.sql` command.
  4. Commit the change.

### Executing the Schema Creator Utility with -s Option

If you want to run the OFS ECM Application Pack Installer in Silent mode, it is mandatory to execute the schema creator utility with `-s` option.

To execute the utility with `-s` option, follow these steps:

1. Edit the file `OFS_ECM_PACK/schema_creator/conf/OFS_ECM_SCHEMA_IN.xml` in text editor.
2. Execute the utility with `-s` option.

For example `./osc.sh -s`

**Figure 4-5** Schema Creator with -s option

```

$ ./osc.sh -s
profile Executed
=====
You have chosen ONLINE mode
=====
Triggering the utility in ONLINE mode will execute the DDLs directly on the Database. Do you wish to proceed? (Y/N):
Y
=====
Java Validation Started ...
Java found in : /scratch/oracle/java/jre1.8.0_45/bin
JAVA Version found : 1.8.0_45
JAVA Bit Version found : 64-bit
Java Validation Completed. Status : SUCCESS
=====
DB specific Validation Started ...
Enter the DB User Name With SYSDBA Privileges:
sys AS SYSDBA
Enter the User Password:
Oracle Client version : 12.1.0.2.0. Status : SUCCESS
Oracle Server version Current value : 12.1.0.2.0. Status : SUCCESS
DB specific Validation Completed. Status : SUCCESS
=====
Schema Creation Started
=====

```

---



---

**Note:** To execute the utility in OFFLINE mode with Silent option, type `./osc.sh -o -s`

---



---



## Executing the Schema Creator Utility while Installing Subsequent Applications Pack

While executing the schema creator utility for subsequent Applications Pack, you can choose to install the pack either on the same Information Domain/Atomic Schema or on a new Information Domain/Atomic Schema. You can execute the Schema Creator Utility either in Online or Offline mode.

To execute the schema creator utility while installing OFS ECM Pack over an existing Application Pack, follow these steps:

1. Perform the steps 1 to 5 from the [Executing the Schema Creator Utility](#) section.

---



---

**Note:** On successful execution of Schema Creator utility, the console displays the following status message:

*Success. Please proceed with the installation.*

See the log file in `OFS_ECM_PACK/schema_creator/logs` directory for execution status, if scripts are executed in online mode.

See the `log_sysdba_output_scripts.log` for execution status, if executed in offline mode.

If there are any errors, contact Oracle Support Services.

---



---

## Verifying the Schema Creator Log Files

You can verify the log files for any errors faced during the schema creation process in the following location: `OFS_ECM_PACK/schema_creator/logs`.

## Installing the OFS ECM Application Pack

This section provides instructions to install the OFS ECM Application Pack depending on the mode of installation.

- [Installing in Silent Mode](#)

### Installing in Silent Mode

In the Silent Mode Installation you must configure the product XML files and follow instructions in the command prompt.

#### Configuring OFSAAI\_InstallConfig.xml

Follow these instructions to configure `OFSAAI_InstallConfig.xml` file:

1. Log in to the system as non-root user.
2. Identify a directory for installation and set the same in the user `.profile` file as the following:
 

```
FIC_HOME=< OFSAA Installation Directory >
export FIC_HOME
```
3. Execute the user `.profile`.
4. Navigate to the file: `OFS_ECM_PACK/OFS_AAI/conf/OFSAAI_InstallConfig.xml`
5. Configure the `OFSAAI_InstallConfig.xml` as mentioned in the section [Configuring OFSAAI\\_InstallConfig.xml file](#). Set the `InteractionVariable` parameter

values manually as mentioned in the table. If a value is not applicable, enter NA and ensure that the value is not entered as NULL.

## Configuring InstallConfig.xml

To configure the InstallConfig.xml file, follow these steps:

1. Navigate to the file: OFS\_ECM\_PACK/OFS\_ECM/conf/InstallConfig.xml
2. Enter the details mentioned in the tags (<!-- Start: User input required for silent installer. --> and <!-- End: User input required for silent installer. -->) as mentioned in the following table.

**Table 4-1 InstallConfig.xml Parameters**

Placeholder Name	Significance and Expected Value	Mandatory
##OFS_ECM_BASE_COUNTRY##	ISO country code to use during data ingestion to record institution-derived geography risk on parties on transactions that are internal to the OFSECM client. For example: base_country=US base_country=US	Yes
##OFS_ECM_DEFAULT_JURISDICTION##	Jurisdiction to assign the derived entities and derived addresses. For example: default_jurisdiction=AMEA	Yes
##OFS_ECM_SMTP_HOST##	Hostname of the e-mail gateway to be used by the application for e-mail notifications. For example: smtp_host=mailhost.domain.com smtp_host=mailhost.domain.com	Yes
##OFS_ECM-NLS_LENGTH_SEMANTICS##	##OFS_AML-NLS_LENGTH_SEMANTICS##NLS_LENGTH_SEMANTICS database variable for executing the DDL scripts. Applicable values are CHAR/BYTE. <b>Note:</b> Recommendation to go with CHAR.	Yes
##OFS_ECM_ANALYST_DATA_SOURCE##	Name of the Analyst Data source used for Admin Tools Configurations. For example: Create a data source with name ANALYST	Yes
##OFS_ECM_MINER_DATA_SOURCE##	Name of the Miner Data source used for Admin Tools Configurations For example: Create a data source with name MINER	Yes
##OFS_ECM_CONFIGURE_OBIEE##	Mention flag as '1' to configure OBIEE URL. Otherwise mention as '0'	Yes
##OFS_ECM_OBIEE_URL##	In case ##OFS_AML_CONFIGURE_OBIEE_URL## mentioned as '1'...provide the URL in the pattern	Yes

Table 4-1 (Cont.) InstallConfig.xml Parameters

Placeholder Name	Significance and Expected Value	Mandatory
##OFS_ECM_CS_SOURCE## ##OFS_ECM_CS_LOADTYPE##</	<p>If the data is from same database then pass the schema name: For example, Atomic Schema: CS_ATOM then, &lt;Variable name="CSSOURCE"&gt;CS_ATOM&lt;/Variable&gt; &lt;Variable name="CSLOADTYPE"&gt;&lt;/Variable&gt;</p> <p>If the data is from different database then pass the 'DBLINK_NAME'.....LOADTYPE = DBLINK For example, &lt;Variable name="AMLSOURCE"&gt;AMLDBL&lt;/Variable&gt; &lt;Variable name="AMLLOADTYPE"&gt;DBLINK&lt;/Variable&gt;</p> <p>Similarly, configure the following placeholders depending on your requirement:</p> <p>##OFS_ECM_AML_SOURCE## ##OFS_ECM_AML_LOADTYPE## ##OFS_ECM_KYC_SOURCE## ##OFS_ECM_KYC_LOADTYPE## ##OFS_ECM_CS_SOURCE## ##OFS_ECM_CS_LOADTYPE## ##OFS_ECM_EXTERNALSYSTEMSOURCE## ##OFS_ECM_EXTERNALSYSTEMLOADTYPE## ##OFS_ECM_TBAML_SOURCE## ##OFS_ECM_TBAML_LOADTYPE## ##OFS_ECM_FATCA_SOURCE## ##OFS_ECM_FATCA_LOADTYPE##</p>	Yes
##OFS_ECM_IDX_CM_TBSP##	This attribute refers to the Index Tablespace values present in OFS_ECM_SCHEMA_OUTPUT.xml which was generated at the time of installation	Yes
##OFS_COMM_DATA_TBSP##	Name of the comm tablespace where the third party table should be created For example, COMM_DATA_TBSP	Yes
<p><b>Note:</b> The WEB_SERVER_PORT value must be taken from the OFSAAI_InstallConfig.xml file. Also, based on the value of HTTPS_ENABLE in OFSAAI_InstallConfig.xml, the PROTOCOL will be https for value 1 and http for value 0.</p>		
##CommonGateway_DATA_SOURCE##	If OFS BD application is installed and already configured for common gateway, then give the data source name pointing to the OFS BD atomic schema else update with the ECM INFODOM name.	Yes
##CommonGateway_T2J_DATA_SOURCE##	Parameter value should be updated with the ECM INFODOM name.	Yes
##CommonGateway_INPUT_WEB_PROTOCOL_SERVER_PORT##	This is the URL of createJSON Service till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	Yes

**Table 4–1 (Cont.) InstallConfig.xml Parameters**

Placeholder Name	Significance and Expected Value	Mandatory
##JSON_TABLE_WEB_PROTOCOL_SERVER_PORT##	This is the URL of JSON To Table Service deployed as part of OFS BD. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes if ECM is integrated with OFS KYC. If not, value must be J2URL
##CommonGateway_PROTOCOL_SERVER_PORT##	This is the URL of Common Gateway Service till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes
##KYC_RISK_SCORE_URL##	This is the URL of OFS BD Application till the context name. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	Yes if ECM is integrated with OFS KYC. If not, value must be BDURL
##OFSS_WLS_PROTOCOL_SERVER_PORT##	This is the URL of OFS Watchlist Application till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes
##AAI_URL##	If OFS BD application is installed and already configured for common gateway, then give the OFS BD Application URL till the context name else give the OFS ECM Application URL till the context name. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	Yes. If KYC Onboarding is used, then yes. Else, use literal AAI_URL
##CS_PROTOCOL_SERVER_PORT##	This is the URL of OFS Customer Screening Application till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes if OFS CS is installed. If not, value must be CS_URL

---

**Note:** After applying patch 29388576, the KYC logs can be generated separately in the desired path. This path need to be mentioned in ##COMM\_LOG\_PATH## which is present in patchconfig.xml inside the patch 29388576.

---

### Running the installer in Silent Mode

To install the OFSAA Infrastructure in Silent mode for java 7 and java 8, follow these steps:

1. Navigate to the OFS\_ECM\_PACK/bin folder.
2. Execute the command in the console:

```
./setup.sh SILENT
```

### Completing the installation in Silent Mode

On launching the installer in silent mode, the environment check utility is executed. Enter the required information to execute the utility as explained:

---

**Note:** The above table item is asked if environment check utility is executed in the standalone mode.

---

```

profile executed
FIC_HOME : /scratch/ofsaadb/ECM805
Environment check utility started...
=====
Java Validation Started ...
Java found in : /scratch/ofsaadb/jre1.7.0_80/bin
JAVA Version found : 1.7.0_80
JAVA Bit Version found : 64-bit
Java Validation Completed. Status : SUCCESS
=====
Environment Variables Validation Started ...
ORACLE_HOME : /scratch/oracle/app/product/12.1.0/client_1
ORACLE_ADMIN : /scratch/ofsaadb
Environment Variables Validation Completed. Status : SUCCESS
=====
OS specific Validation Started ...
Checking en_US.utf8 locale. Status : SUCCESS
Unix shell found : /bin/ksh. Status : SUCCESS
Total file descriptors : 15000. Status : SUCCESS
Total number of process : 10240. Status : SUCCESS
OS version : 6. Status : SUCCESS
OS specific Validation Completed. Status : SUCCESS
=====
DB specific Validation Started ...
Oracle Client version : 12.1. Status : SUCCESS
Successfully connected to schema ecm_atm_805. Status : SUCCESS
CREATE SESSION has been granted to user. Status : SUCCESS
CREATE PROCEDURE has been granted to user. Status : SUCCESS
CREATE VIEW has been granted to user. Status : SUCCESS
CREATE TRIGGER has been granted to user. Status : SUCCESS
CREATE MATERIALIZED VIEW has been granted to user. Status : SUCCESS
CREATE TABLE has been granted to user. Status : SUCCESS
CREATE SEQUENCE has been granted to user. Status : SUCCESS
SELECT privilege is granted for NLS_INSTANCE_PARAMETERS view. Current value : SELECT. Status : SUCCESS
NLS_LENGTH SEMANTICS : BYTE. Current value : BYTE. Status : SUCCESS
NLS_CHARACTERSET : AL32UTF8. Current value : AL32UTF8. Status : SUCCESS
SELECT privilege is granted for V_$parameter view. Current value : SELECT. Status : SUCCESS
Open cursor value is greater than 1000. Current value : 4096. Status : SUCCESS
SELECT privilege is granted for USER_TS_QUOTAS view. Current value : SELECT. Status : SUCCESS
Schema is granted with at least 500 MB table space. Current value : 10239.6011352539063 MB. Status : SUCCESS
Oracle Server version Current value : 11.2.0.3.0. Status : SUCCESS
DB specific Validation Completed. Status : SUCCESS
=====
Environment check utility Status : SUCCESS
=====
*****
Welcome to Oracle Financial Services Analytical Applications Infrastructure (OFS AAI) Installation *
*****
Checking Infrastructure installation status ...
Infrastructure installation does not exist. Proceeding with Infrastructure installation ...
Triggering Infrastructure installation ...

Please enter Infrastructure Application/Database component FTP/SFTP password :
=====
Start of Environment Checks
=====
scratch/ofsaadb/installer/OFS_ECM_PACK/OFS_ECM/conf

```

**Note:**

- Enter the Infrastructure FTP/SFTP password value, when prompted at the command prompt to access Product Staging/Metadata repository directory in the application server.
- Enter **Always**, when prompted to add host key fingerprint.

1. The OFSAAI License Agreement is displayed as shown in the figure:

**Figure 4–6 OFSAAI License Agreement Page**

```

=====
                          Start of Environment Checks
=====
/scratch/ofsadb/installer/OFS_ECM_PACK/OFS_ECM/conf
File log4j.xml not found. Using default logging settings
=====
-----Validating JAVA Version-----
Current JAVA Version is: 1.7.0_80
Required JAVA Version is: 1.7
JAVA Version validation status: SUCCESS
=====
-----Checking OS-----
OS Type: LINUX
OS Supported: TRUE
Current OS Version:6.7
Supported OS Version:5.5
OS Version Validation Status: SUCCESS
=====
-----Checking Disk Space-----
Available Disk Space is :370697
Required Disk Space is :700 MB
Validation for category DISK SPACE. STATUS : SUCCESS
=====
-----Checking Temp Space-----
Available Temp Space is 25032 MB
Required Temp Space is 700 MB
Validation for category TEMP SPACE. STATUS : SUCCESS
=====
-----Checking RAM-----
Available RAM in MB 13511
Required RAM in MB 700 MB
Validation for category RAM. STATUS : SUCCESS
=====
                          End of Environment Checks
=====

*****
OFSAA APPLICATION PACK LICENSE AGREEMENT
*****
* Oracle Financial Services Analytical Applications (OFSAA) application packs are groups of OFSAA products packaged together into a single installer. Each application pack contains OFSAA applications that address specific functional domains.*
* Every application pack also includes the following OFSAA infrastructure application options which are automatically installed by every application pack installer:
  1. Oracle Financial Services Analytical Applications Infrastructure
  2. Oracle Financial Services Enterprise Modeling
  3. Oracle Financial Services In-line Processing Engine
  4. Oracle Financial Services Big Data Processing
* Oracle Financial Services Analytical Applications Infrastructure (OFS AAI) is the base infrastructure for all OFSAA applications and is therefore automatically installed and enabled by the application pack installer.*
* The application pack installer always installs Oracle Financial Services Enterprise Modeling, Oracle Financial Services In-line Processing Engine and Oracle Financial Services Big Data Processing application options along with the application pack applications, but enables them only if any application that requires their functionality is enabled.*
* Any OFSAA application that is enabled must be licensed for use. Oracle Financial Services Analytical Applications Infrastructure, Oracle Financial Services Enterprise Modeling, Oracle Financial Services In-line Processing Engine and Oracle Financial Services Big Data Processing are individually licensable application options.*
* Application products once enabled cannot be disabled. Application products not enabled on installation, may later be enabled using the "Manage OFSAA Product License(s)" feature of the platform.*
*****

```

2. Enter Y/y to accept the License Agreement.

---

**Note:** SYSADMN and SYSAUTH are the two default OFSAAI administrative users created.

---

```

=====
Start of Environment Checks
=====
scratch/ofsaadb/installer/OFS_ECM_PACK/OFS_ECM/conf
file log4j.xml not found. Using default logging settings

=====
Validating JAVA Version=====
Current JAVA Version is: 1.7.0_80
Required JAVA Version is: 1.7
JAVA Version validation status: SUCCESS
=====
Checking OS=====
OS Type: LINUX
OS Supported: TRUE
Current OS Version:6.7
Supported OS Version:5.5
OS Version Validation Status: SUCCESS
=====
Checking Disk Space=====
Available Disk Space is :370697
Required Disk Space is :700 MB
Validation for category DISK SPACE. STATUS : SUCCESS
=====
Checking Temp Space=====
Available Temp Space is 25032 MB
Required Temp Space is 700 MB
Validation for category TEMP SPACE. STATUS : SUCCESS
=====
Checking RAM=====
Available RAM in MB 13511
Required RAM in MB 700 MB
Validation for category RAM. STATUS : SUCCESS
=====
End of Environment Checks
=====

*****
OFSAA APPLICATION PACK LICENSE AGREEMENT
*****
Oracle Financial Services Analytical Applications (OFSAA) application packs are groups of OFSAA
application pack contains OFSAA applications that address specific functional domains.*
Every application pack also includes the following OFSAA infrastructure application options whi
aller:
1. Oracle Financial Services Analytical Applications Infrastructure
2. Oracle Financial Services Enterprise Modeling
3. Oracle Financial Services In-line Processing Engine
4. Oracle Financial Services Big Data Processing
Oracle Financial Services Analytical Applications Infrastructure (OFS AAI) is the base infras
cally installed and enabled by the application pack installer.*
The application pack installer always installs Oracle Financial Services Enterprise Modeling,
Oracle Financial Services Big Data Processing application options along with the application pack ap
requires their functionality is enabled.*
Any OFSAA application that is enabled must be licensed for use. Oracle Financial Services Analy
Enterprise Modeling, Oracle Financial Services In-line Processing Engine and Oracle Financial
lication options.*
Application products once enabled cannot be disabled. Application products not enabled on inst
ct License(s)" feature of the platform.*
*****

```

```
*****
Are you accepting the terms and conditions mentioned above? [Y/N]:
y
Starting installation...
Preparing to install...
Extracting the installation resources from the installer archive...
Configuring the installer for this system's environment...

Launching installer...

Preparing SILENT Mode Installation...

=====
OFSAAInfrastructure                (created with InstallAnywhere)
-----

Installing...

[=====|=====|=====|=====]
[-----|-----|-----|-----]

Installation Complete.
.profile executed
.profile executed

*****
Welcome to OFS ECM PACK Installation
*****
Starting OFSAA Service...
OFSAA Service - OK
Preparing to install...
Extracting the installation resources from the installer archive...
Configuring the installer for this system's environment...

Launching installer...

Preparing SILENT Mode Installation...

=====
pack_installsilent                (created with InstallAnywhere)
-----

Installing...

[=====|=====|=====|=====]
[-----|-----|-----|-----]

Installation Complete.
.profile executed
*****
```

---

**Note:** The installation process continues on the console. Do not close the console until the installation process is complete.

Execute `.profile` from user home directory after the installation is completed.

---



3. Perform steps mentioned in the [Verifying Installation](#) section.

## Verifying Installation

Verify the following logs files for more information:

- See the `Pack_install.log` file in the folder: `/OFS_ECM_PACK/logs`
- See the OFSAA logs under `/OFS_ECM_PACK/OFS_AAI/logs`

---

---

**Note:** The warning message, "name is already used by an existing object" is displayed after successful Pack on Pack installation. This warning can be ignored.

---

---

- See the `ECM_log` files located in the folder: `/OFS_ECM_PACK/OFS_ECM/logs` for OFS ECM Application Pack Installation log file.

---

---

**Note:** If there are any errors, do not proceed with further installation and contact Oracle Support Services.

---

---

## Configuring TBAML (Pack on Pack Installation)

If you are performing pack on pack installation, then TBAML application should be always installed after sanctions pack.

## Mandatory Patches to Install

1. DMT migration utility is available as part of the installer to migrate the DMT metadata (PLC/Data Source/Data Mapping/Data File Mapping) to be persisted in tables instead of XML. To identify when to migrate, what/how to migrate, and how to handle migration issues, see [OFSAA DMT Metadata Migration Guide](#).

---

---

**Note:** Execute the DMT Migration Utility to manually migrate the DMT metadata of the Applications which are not upgraded to 8.0.7.0.0.

---

---



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## Upgrading the OFS ECM Applications Pack

This chapter includes the following topics:

- [Upgrading from OFS ECM 8.0.5.0.0 to OFS ECM 8.0.7.0.0](#)
- [Upgrading from OFS ECM 8.0.6.0.0 to OFS ECM 8.0.7.0.0](#)
- [Post Upgradation Steps](#)

Before upgrading from ECM 8.0.5.0.0 to ECM 8.0.7.0.0 and ECM 8.0.6.0.0 to ECM 8.0.7.0.0, perform the below steps:

1. Open the `INFODOM_DATABASE.XML` which is placed under `$ftpshare_path/FCCMINFO/erwin/fipxml`
2. Find `ORDINAL=""` and replace with appropriate ordinal values.

For example, there are 12 Ordinals with empty values as mentioned below. If you have more ordinal with blank values, then update them accordingly.

**INDEX NAME="UK\_CASE\_ACCT\_LIST\_MEMBRSHPS"**

```
<INDEX_COLUMNS><COLUMN_NAME ORDINAL=" 2 " SORT="ASC">CASE_ACCT_SEQ_ID</COLUMN_NAME><COLUMN_NAME ORDINAL=" 3 " SORT="ASC">LIST_SRC_CD</COLUMN_NAME><COLUMN_NAME ORDINAL=" 4 " SORT="ASC">LIST_ADD_DT</COLUMN_NAME><COLUMN_NAME ORDINAL=" 5 " SORT="ASC">LIST_NTITY_TYPE_CD</COLUMN_NAME><COLUMN_NAME ORDINAL=" 1 " SORT="ASC">CASE_INTRL_ID</COLUMN_NAME></INDEX_COLUMNS>
```

**INDEX NAME="UK\_CASE\_ACCT\_RSTRNS"**

```
<INDEX_COLUMNS><COLUMN_NAME ORDINAL=" 2 " SORT="ASC">CASE_ACCT_SEQ_ID</COLUMN_NAME><COLUMN_NAME ORDINAL=" 3 " SORT="ASC">ACCT_RSTRN_CD</COLUMN_NAME><COLUMN_NAME ORDINAL=" 1 " SORT="ASC">CASE_INTRL_ID</COLUMN_NAME></INDEX_COLUMNS>
```

**INDEX NAME="UK\_CASE\_ACCT\_SUPPL\_ATTR"**

```
<INDEX_COLUMNS><COLUMN_NAME ORDINAL=" 1 " SORT="ASC">CASE_ACCT_SEQ_ID</COLUMN_NAME><COLUMN_NAME ORDINAL=" 2 " SORT="ASC">CASE_ACCT_SPLMNTL_ATTR_SEQ_ID</COLUMN_NAME><COLUMN_NAME ORDINAL=" 3 " SORT="ASC">CASE_INTRL_ID</COLUMN_NAME></INDEX_COLUMNS>
```

**INDEX NAME="UK\_CASE\_CB\_LST\_MEMBERSHP"**

```
<INDEX_COLUMNS><COLUMN_NAME ORDINAL=" 2 " SORT="ASC">LIST_SRC_CD</COLUMN_NAME><COLUMN_NAME ORDINAL=" 4 " SORT="ASC">LIST_ADD_DT</COLUMN_NAME><COLUMN_NAME ORDINAL=" 5 " SORT="ASC">LIST_NTITY_TYPE_CD</COLUMN_NAME><COLUMN_NAME ORDINAL=" 3 "
```

---

SORT="ASC">CASE\_INSTN\_SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME  
ORDINAL="1" SORT="ASC">CASE\_INTRL\_ID</COLUMN\_NAME></INDEX\_  
COLUMNS>

**INDEX NAME="UK\_CASE\_CUST\_EMAILS"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_CUST\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2"  
SORT="ASC">EMAIL\_ADDR\_TX</COLUMN\_NAME><COLUMN\_NAME  
ORDINAL="3" SORT="ASC">CASE\_INTRL\_ID</COLUMN\_NAME></INDEX\_  
COLUMNS>

**INDEX NAME="IDX\_CUST\_MBRSH\_P\_CASEID"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_CUST\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2" SORT="ASC">CASE\_  
CUST\_MEMBERSHIP\_SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="3"  
SORT="ASC">CASE\_INTRL\_ID</COLUMN\_NAME></INDEX\_COLUMNS>

**INDEX NAME="UK\_CUST\_MBRSH\_LIST"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_CUST\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2" SORT="ASC">LIST\_  
SRC\_CD</COLUMN\_NAME><COLUMN\_NAME ORDINAL="3" SORT="ASC">LIST\_  
ADD\_DT</COLUMN\_NAME><COLUMN\_NAME ORDINAL="4" SORT="ASC">LIST\_  
NTITY\_TYPE\_CD</COLUMN\_NAME><COLUMN\_NAME ORDINAL="5"  
SORT="ASC">CASE\_INTRL\_ID</COLUMN\_NAME></INDEX\_COLUMNS>

**INDEX NAME="UK\_CASE\_CUST\_PHONS"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_CUST\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="3" SORT="ASC">PHON\_  
NB</COLUMN\_NAME><COLUMN\_NAME ORDINAL="4" SORT="ASC">PHON\_  
USAGE\_CD</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2"  
SORT="ASC">CASE\_INTRL\_ID</COLUMN\_NAME></INDEX\_COLUMNS>

**INDEX NAME="UK\_CASE\_CUST\_SUPPL\_ATTR"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_CUST\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2" SORT="ASC">CASE\_  
CUST\_SPLMNTL\_ATTR\_SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME  
ORDINAL="3" SORT="ASC">CASE\_INTRL\_ID</COLUMN\_NAME></INDEX\_  
COLUMNS>

**INDEX NAME="UK\_CASE\_EMP\_EMAIL\_ADDR"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_EMP\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2"  
SORT="ASC">EMAIL\_ADDR\_TX</COLUMN\_NAME><COLUMN\_NAME  
ORDINAL="3" SORT="ASC">CASE\_INTRL\_ID</COLUMN\_NAME></INDEX\_  
COLUMNS>

**INDEX NAME="UK\_CASE\_EMP\_PHON"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_EMP\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2" SORT="ASC">PHON\_  
NB</COLUMN\_NAME><COLUMN\_NAME ORDINAL="3" SORT="ASC">CASE\_  
INTRL\_ID</COLUMN\_NAME></INDEX\_COLUMNS>

**INDEX NAME="UK\_CASE\_MANGD\_ACCT"**

<INDEX\_COLUMNS><COLUMN\_NAME ORDINAL="1" SORT="ASC">CASE\_ACCT\_  
SEQ\_ID</COLUMN\_NAME><COLUMN\_NAME ORDINAL="2" SORT="ASC">CASE\_

---

```
MANGD_ACCT_SEQ_ID</COLUMN_NAME><COLUMN_NAME ORDINAL=" 3 "
SORT="ASC">CASE_INTRL_ID</COLUMN_NAME></INDEX_COLUMNS>
```

## Upgrading from OFS ECM 8.0.5.0.0 to OFS ECM 8.0.7.0.0

### Prerequisites

---

---

**Note:**

- If you are upgrading from OFS ECM 8.0.5.0.0 to OFS ECM 8.0.7.0.0, then you should first apply the patch 28411493 (OFS ECM 8.0.5.0.20) from <https://support.oracle.com> and follow the instructions mentioned in Readme. Take complete backup of the environment before upgrade.
- Before you upgrade from 8.0.5.0.0 to 8.0.7.0.0, download and install the patch 29021715 from <https://support.oracle.com>. Patch 29021715 is required only if you have BD 8.0.5.0.0 installed in the same Instance.
- Ensure to take the backup of File System (FIC\_HOME/FTP SHARE), Atomic schema, and Config schema before performing upgrade.

Ensure that the dispatcher is not running. If the dispatcher is running, stop and then start the upgrading process.

- Ensure that you end all the batches before you start the upgrade process.
- Ensure that you run the END\_MANTAS\_BATCH before starting the upgrade.
- Take backup of FCC\_CUST\_ACCT\_ROLE table. Remove the duplicates grouping by CUST\_ACCT\_ROLE\_CD, DATA\_ORIGIN and make sure that latest MIS\_DATE records are present in the table by executing the below mentioned query.

```
delete from fcc_cust_acct_role where rowid not
in( select max(rowid) from fcc_cust_acct_role
group by CUST_ACCT_ROLE_CD,DATA_ORIGIN);
```

- Take backup of FCC\_WATCH\_LIST table and truncate the records. Remove duplicates from back up FCC\_WATCH\_LIST table by picking records for the latest date. Insert the records into FCC\_WATCH\_LIST table
  - Take backup of below mentioned tables and truncate the same:  
FCC\_INSTITUTION\_LOOKUP  
FCC\_TRADE\_FIN\_DOC\_EVNT  
FCC\_TRADE\_FIN\_BRKRGE\_EVNT  
FCC\_ACCT\_ID\_INSTN\_ID\_MAP
  - For enabling the unlimited Cryptographic Policy for Java, see the section [Enabling Unlimited Cryptographic Policy for Java](#).
- 
- 

Before performing upgrade from OFC ECM 8.0.5.0.0 to OFC ECM 8.0.7.0.0, follow below steps:

1. Navigate to below path:

---

```
$FIC_WEB_HOME/webroot/WEB-INF/ lib
```

2. Remove the below jar:  
aai-wsmreservice.jar

Refer to the following instructions to download, extract, install, and configure this release:

1. Download and copy 28183877\_GENERIC.zip to the local host. To download and copy the OFS ECM Applications Pack v8.0.7.0.0 archive file, see [Downloading and Copying the OFS ECM Application Pack Installer](#) section.

---

---

**Note:** In case of upgrade, ignore the steps mentioned in Readme\_OFSECM\_8.0.5.0.19.txt.

---

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---

**Note:** The archive files are different for every operating system like AIX, Solaris, and RHEL/Oracle Linux.

---

---

2. Navigate to the directory and extract the contents of the folder.
3. Execute the below mentioned sql scripts in ECM 805 Config Schema Sequentially  
Backup\_Table\_Creation.sql  
Temp\_Table\_Creation.sql  
pr2\_process\_b\_806.sql  
pr2\_run\_b\_806.sql  
Process\_Update\_806.sql
4. Download the ECM 807 Installer from MOS and unzip the same.
5. Navigate to OFS\_ECM\_PACK and grant execute (755) permission for all executables  

```
$ chmod 755 *
```
6. Modify PatchConfig.xml under OFS\_ECM\_PACK/OFS\_ECM/conf/PatchConfig.xml with appropriate values as follows:

Placeholder Name	Significance and Expected Value	Mandatory
##OFS_ECM_SAVE_METADATA##	This attribute is used by the installer to decide whether to execute hierarchy Resave. Applicable value is ALL.	Yes
##EXECUTE_PRE_AND_POST_SCRIPTS##	This flag indicates if certain scripts need to be executed just before and just after the datamodel upload Applicable value is 1.	Yes
##OFS_ECM_ANALYST_DATA_SOURCE##	Name of the Analyst Data source used for Admin Tools Configurations. For example: Create a data source with name ANALYST	Yes
##OFS_ECM_MINER_DATA_SOURCE##	Name of the Miner Data source used for Admin Tools Configurations For example: Create a data source with name MINER	Yes

Placeholder Name	Significance and Expected Value	Mandatory
##BASE_COUNTRY##	ISO country code to use during data ingestion to record institution-derived geography risk on parties on transactions that are internal to the OFSECM client.  For example: base_country=US  base_country=US	Yes
##DEFAULT_JURISDICTION##	Jurisdiction to assign the derived entities and derived addresses.  For example:  default_jurisdiction=AMEA	Yes
##TNS_ADMIN##	This attribute refers to the path where TNSNAMES.ORA is placed.  For example, /scratch/ofsaapp	Yes
##BIG_DATA_ENABLE##	Placeholder to enable Big Data. Enter <b>FALSE</b> .	Yes
##OFS_ECM_DATA_CM_TBSP##	This attribute refers to the Data Tablespace values present in OFS_ECM_SCHEMA_OUTPUT.xml which was generated at the time of installation	Yes
##OFS_ECM_CS_SOURCE## ##OFS_ECM_CS_LOADTYPE##</	If the data is from same database then pass the schema name: For example, Atomic Schema: CS_ATOM  then,  <Variable name="CSSOURCE">CS_ATOM</Variable> <Variable name="CSLOADTYPE"></Variable>  If the data is from different database then pass the 'DBLINK_NAME'.....LOADTYPE = DBLINK  For example,  <Variable name="AMLSOURCE">AMLDBL</Variable> <Variable name="AMLOADTYPE">DBLINK</Variable>  Similarly, configure the following placeholders depending on your requirement:  ##OFS_ECM_AML_SOURCE## ##OFS_ECM_AML_LOADTYPE## ##OFS_ECM_KYC_SOURCE## ##OFS_ECM_KYC_LOADTYPE## ##OFS_ECM_CS_SOURCE## ##OFS_ECM_CS_LOADTYPE## ##OFS_ECM_EXTERNALSYSTEMSOURCE## ##OFS_ECM_EXTERNALSYSTEMLOADTYPE## ##OFS_ECM_TBAML_SOURCE## ##OFS_ECM_TBAML_LOADTYPE## ##OFS_ECM_FATCA_SOURCE## ##OFS_ECM_FATCA_LOADTYPE##	Yes
##OFS_ECM_IDX_CM_TBSP##	This attribute refers to the Index Tablespace values present in OFS_ECM_SCHEMA_OUTPUT.xml which was generated at the time of installation	Yes

Placeholder Name	Significance and Expected Value	Mandatory
##OFS_COMM_DATA_TBSP##	Name of the comm tablespace where the third party table should be created  For example, COMM_DATA_TBSP	Yes
<b>Note:</b> The WEB_SERVER_PORT value must be taken from the OFSAAI_InstallConfig.xml file. Also, based on the value of HTTPS_ENABLE in OFSAAI_InstallConfig.xml, the PROTOCOL will be https for value 1 and http for value 0.		
##CommonGateway_DATA_SOURCE##	If OFS BD application is installed and already configured for common gateway, then give the data source name pointing to the OFS BD atomic schema else update with the ECM INFODOM name.	Yes
##CommonGateway_T2J_DATA_SOURCE##	Parameter value should be updated with the ECM INFODOM name.	Yes
##CommonGateway_INPUT_WEB_PROTOCOL_SERVER_PORT##	This is the URL of createJSON Service till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	Yes
##JSON_TABLE_WEB_PROTOCOL_SERVER_PORT##	This is the URL of JSON To Table Service deployed as part of OFS BD. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes if ECM is integrated with OFS KYC. If not, value must be J2TURL
##CommonGateway_PROTOCOL_SERVER_PORT##	This is the URL of Common Gateway Service till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes
##KYC_RISK_SCORE_URL##	This is the URL of OFS BD Application till the context name. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	Yes if ECM is integrated with OFS KYC. If not, value must be BDURL
##OFSS_WLS_PROTOCOL_SERVER_PORT##	This is the URL of OFS Watchlist Application till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes
##AAI_URL##	If OFS BD application is installed and already configured for common gateway, then give the OFS BD Application URL till the context name else give the OFS ECM Application URL till the context name. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	Yes. If KYC Onboarding is used, then yes. Else, use literal AAI_URL
##CS_PROTOCOL_SERVER_PORT##	This is the URL of OFS Customer Screening Application till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	Yes if OFS CS is installed. If not, value must be CS_URL

---

**Note:** After applying patch 29388576, the KYC logs can be generated separately in the desired path. This path need to be mentioned in ##COMM\_LOG\_PATH## which is present in patchconfig.xml inside the patch 29388576.

---

7. Navigate to the OFS\_ECM\_PACK/bin folder.



8. Execute setup.sh file using the following command:

```
$. /setup.sh SILENT
```

## Upgrading from OFS ECM 8.0.6.0.0 to OFS ECM 8.0.7.0.0

### Prerequisites

---



---

#### Note:

- You should install ECM 8.0.6.0.1 and ECM 8.0.6.0.2 before performing upgrade to 8.0.7.0.0.
- Before you upgrade from 8.0.6.0.0 to 8.0.7.0.0, download and install the patch 29010846 from <https://support.oracle.com>. Patch 29010846 is required only if you have BD 8.0.6.0.0 installed in the same Instance.
- Ensure to take the backup of File System (FIC\_HOME/FTP SHARE), Atomic schema, and Config schema before performing upgrade.

Ensure that the dispatcher is not running. If the dispatcher is running, stop and then start the upgrading process.

- Ensure that you end all the batches before you start the upgrade process.
- Ensure that you run the END\_MANTAS\_BATCH before starting the upgrade.
- Take backup of FCC\_CUST\_ACCT\_ROLE table. Remove the duplicates grouping by CUST\_ACCT\_ROLE\_CD, DATA\_ORIGIN and make sure that latest MIS\_DATE records are present in the table by executing the below mentioned query:
- Take backup of FCC\_WATCH\_LIST table and truncate the records. Remove duplicates from back up FCC\_WATCH\_LIST table by picking records for the latest date. Insert the records into FCC\_WATCH\_LIST table
- Take backup of below mentioned tables in case of having data and truncate the same. Post Upgrade, data can be loaded back from backup tables.

```
delete from fcc_cust_acct_role where rowid not in(
```

```
select max(rowid) from fcc_cust_acct_role group by
CUST_ACCT_ROLE_CD,DATA_ORIGIN);
```

```
FCC_CLIENTBANKSMRY_LOOKUP
```

```
FCC_TRANSACTION_PIVOT_TRANSFRM
```

```
FCC_TRXN_PIVOT_TRANSFORM_DS
```

```
STG_FCC_EVENT_ACCOUNT
```

```
FCC_INSTITUTION_LOOKUP
```

```
FCC_TRADE_FIN_DOC_EVNT
```

```
FCC_TRADE_FIN_BRKRGE_EVNT
```

```
FCC_ACCT_ID_INSTN_ID_MAP
```

- For enabling the unlimited Cryptographic Policy for Java, see the section [Enabling Unlimited Cryptographic Policy for Java](#).
- 
-

Perform the following steps:

1. Download and copy 27938294\_GENERIC.zip, 28276153\_GENERIC.zip, and 28713907\_GENERIC.zip to the local host. To download and copy the archive file, see [Downloading and Copying the OFS ECM Application Pack Installer](#) section.

---

**Note:** The archive files are different for every operating system like AIX, Solaris, and RHEL/Oracle Linux.

---

2. Modify PatchConfig.xml under OFS\_ECM\_PACK/OFS\_ECM/conf/PatchConfig.xml with appropriate values as follows:

Placeholder Name	Significance and Expected Value	Mandatory
##OFS_ECM_SAVE_METADATA##	This attribute is used by the installer to decide whether to execute hierarchy Resave. Applicable value is ALL.	Yes
##EXECUTE_PRE_AND_POST_SCRIPTS##	This flag indicates if certain scripts need to be executed just before and just after the datamodel upload Applicable value is 1.	Yes
##OFS_ECM_ANALYST_DATA_SOURCE##	Name of the Analyst Data source used for Admin Tools Configurations. For example: Create a data source with name ANALYST	Yes
##OFS_ECM_MINER_DATA_SOURCE##	Name of the Miner Data source used for Admin Tools Configurations For example: Create a data source with name MINER	Yes
##BASE_COUNTRY##	ISO country code to use during data ingestion to record institution-derived geography risk on parties on transactions that are internal to the OFSECM client. For example: base_country=US base_country=US	Yes
##DEFAULT_JURISDICTION##	Jurisdiction to assign the derived entities and derived addresses. For example: default_jurisdiction=AMEA	Yes
##TNS_ADMIN##	This attribute refers to the path where TNSNAMES.ORA is placed. For example, /scratch/ofsaapp	Yes
##BIG_DATA_ENABLE##	Placeholder to enable Big Data. Enter <b>FALSE</b> .	Yes
##OFS_ECM_DATA_CM_TBSP##	This attribute refers to the Data Tablespace values present in OFS_ECM_SCHEMA_OUTPUT.xml which was generated at the time of installation	Yes

Placeholder Name	Significance and Expected Value	Mandatory
##OFS_ECM_CS_SOURCE## ##OFS_ECM_CS_LOADTYPE##</	<p>If the data is from same database then pass the schema name: For example, Atomic Schema: CS_ATOM then, &lt;Variable name="CSSOURCE"&gt;CS_ATOM&lt;/Variable&gt; &lt;Variable name="CSLOADTYPE"&gt;&lt;/Variable&gt;</p> <p>If the data is from different database then pass the 'DBLINK_NAME'.....LOADTYPE = DBLINK For example, &lt;Variable name="AMLSOURCE"&gt;AMLDBL&lt;/Variable&gt; &lt;Variable name="AMLLOADTYPE"&gt;DBLINK&lt;/Variable&gt;</p> <p>Similarly, configure the following placeholders depending on your requirement:</p> <p>##OFS_ECM_AML_SOURCE## ##OFS_ECM_AML_LOADTYPE## ##OFS_ECM_KYC_SOURCE## ##OFS_ECM_KYC_LOADTYPE## ##OFS_ECM_CS_SOURCE## ##OFS_ECM_CS_LOADTYPE## ##OFS_ECM_EXTERNALSYSTEMSOURCE## ##OFS_ECM_EXTERNALSYSTEMLOADTYPE## ##OFS_ECM_TBAML_SOURCE## ##OFS_ECM_TBAML_LOADTYPE## ##OFS_ECM_FATCA_SOURCE## ##OFS_ECM_FATCA_LOADTYPE##</p>	Yes
##OFS_ECM_IDX_CM_TBSP##	This attribute refers to the Index Tablespace values present in OFS_ECM_SCHEMA_OUTPUT.xml which was generated at the time of installation	Yes
##OFS_COMM_DATA_TBSP##	Name of the comm tablespace where the third party table should be created For example, COMM_DATA_TBSP	Yes
<p>Additional steps to be followed for KYC Onboarding.</p> <p>KYC Onboarding requires additional deployment of the following:</p> <ul style="list-style-type: none"> <li>• Create JSON Service (createJSONService.war)</li> </ul> <p>The above .war file is available in the FIC_HOME/CommonGateway path post-installation.</p> <p>For KYC Onboarding create the table space <b>comm_data_tbsp</b> manually.</p> <p>The below parameters are applicable for KYC Onboarding.</p> <p><b>Note:</b> The WEB_SERVER_PORT value must be taken from the OFSAAI_InstallConfig.xml file. Also, based on the value of HTTPS_ENABLE in OFSAAI_InstallConfig.xml, the PROTOCOL will be https for value 1 and http for value 0.</p>		
##CommonGateway_DATA_SOURCE##	Parameter value should be updated with the INFODOM parameter ,The datasource used for connecting to the schema where common gateway is pointed. For example, ECMINFO	If KYC Onboarding is used, then yes. Else, use literal CommonGateway_DATA_SOURCE

Placeholder Name	Significance and Expected Value	Mandatory
##CommonGateway_T2J_DATA_SOURCE##	Parameter value should be updated with the INFODOM parameter. The datasource used for connecting to the schema where Table to json(createJSONService) for ECM is pointed. For example, ECMINFO	If KYC Onboarding is used, then yes. Else use literal CommonGateway_T2J_DATA_SOURCE
##CommonGateway_INPUT_WEB_PROTOCOL_SERVER_PORT##	This is the URL of Table To JSON Service till the port. Pointing to the ECM schema Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	If KYC Onboarding is used, then yes. Else, use literal CommonGateway_INPUT_WEB_PROTOCOL_SERVER_PORT
##JSON_TABLE_WEB_PROTOCOL_SERVER_PORT##	This is the URL of JSON To Table Service till the port ,pointing to the BD schema. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	If KYC Onboarding is used, then yes. Else, use literal JSON_TABLE_WEB_PROTOCOL_SERVER_PORT
##CommonGateway_PROTOCOL_SERVER_PORT##	This is the URL of Common Gateway Service till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	If KYC Onboarding is used then yes else use literal CommonGateway_PROTOCOL_SERVER_PORT
##KYC_RISK_SCORE_URL##	This is the URL of BD Application till the context name. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	If KYC Onboarding is used, then yes. Else, use literal KYC_RISK_SCORE_URL
##OFSS_WLS_PROTOCOL_SERVER_PORT##	This is the URL of OFS Watchlist Application till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	If KYC Onboarding is used, then yes. Else, use literal OFSS_WLS_PROTOCOL_SERVER_PORT
##AAI_URL##	This is the URL of BD Application till the context name. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT/CONTEXT_NAME>	If KYC Onboarding is used, then yes. Else, use literal AAI_URL
##CS_PROTOCOL_SERVER_PORT##	This is the URL of OFS Customer Screening Application till the port. Example: <PROTOCOL://HOSTNAME:WEB_SERVER_PORT>	If KYC Onboarding is used, then yes. Else, use literal CS_PROTOCOL_SERVER_PORT

3. Navigate to the OFS\_ECM\_PACK/bin folder.
4. Execute setup.sh file using the following command:

```
$. /setup.sh SILENT
```

## Post Upgradation Steps

---

**Note:** Below mentioned steps are common for ECM 8.0.5.0.0 to ECM 8.0.7.0.0 and ECM 8.0.6.0.0 to ECM 8.0.7.0.0 upgrade. These steps need to be performed before the deployment.

In case of ECM environment been upgraded from 8.0.5.0.0 to 8.0.7.0.0, then apply the mandatory patches 29270396 and 29623474 from <https://support.oracle.com> and follow the instructions mentioned in Readme.

Apply patch **29472987**, if you want to use PGX correlation and FATCA application after upgrading from ECM 8.0.5.0.0 to ECM 8.0.7.0.0.

If you are upgrading from ECM 8.0.5.0.0 to ECM 8.0.8.0.0, then execute the following script in ECM Atomic schema sequentially. These scripts are part of OFSECM\_8.0.5.0.19 patch:

1. ACTIONVALIDITYCHECK.sql
2. CASEVALIDITYCHECK.sql

Execute the following script in ECM Config schema

Config\_Insert.sql

---

1. Navigate to below mentioned path from Application Server:

```
$FIC_HOME/ficdb/lib
```

2. Remove the list of old version 4.2.3 jars as mentioned below:

```
spring-webmvc-4.2.3.RELEASE.jar
spring-web-4.2.3.RELEASE.jar
spring-tx-4.2.3.RELEASE.jar
spring-oxm-4.2.3.RELEASE.jar
spring-jms-4.2.3.RELEASE.jar
spring-jdbc-4.2.3.RELEASE.jar
spring-expression-4.2.3.RELEASE.jar
spring-core-4.2.3.RELEASE.jar
spring-context-support-4.2.3.RELEASE.jar
spring-context-4.2.3.RELEASE.jar
spring-beans-4.2.3.RELEASE.jar
spring-aspects-4.2.3.RELEASE.jar
spring-aop-4.2.3.RELEASE.jar
```

3. Navigate to below mentioned path from Application Server:

```
$FIC_WEB_HOME/webroot/WEB-INF/lib
```

4. Remove the list of old version 4.2.3 jars as mentioned below:

```
spring-aop-4.2.3.RELEASE.jar  
spring-aspects-4.2.3.RELEASE.jar  
spring-beans-4.2.3.RELEASE.jar  
spring-context-4.2.3.RELEASE.jar  
spring-core-4.2.3.RELEASE.jar  
spring-expression-4.2.3.RELEASE.jar  
spring-jdbc-4.2.3.RELEASE.jar  
spring-tx-4.2.3.RELEASE.jar  
spring-web-4.2.3.RELEASE.jar
```

5. Recreate ear/war file by triggering `./ant.sh` navigating to the `$FIC_WEB_HOME` directory.

---



---

## Post Deployment Configuration

This section provides detailed information about the Post Deployment Configurations. lists the various configurations to be completed before you use the OFSAA Applications.

- [Creating Application Users](#)
- [Mapping Application User\(s\) to User Group](#)
- [Performing Administrative activities for OFS ECM](#)
- [Performing Configurations for OFS ECM](#)
- [Setting OFS ECM UI as Home Page of OFSAAI for a Particular User](#)

### Creating Application Users

Create the application users in the OFSAA setup prior to use.

---



---

**Note:** This step may not be required if you have already setup users in the OFSAA setup.

For more information see user creation section from the [Oracle Financial Services Analytical Applications Infrastructure User Guide](#).

---



---

### Mapping Application User(s) to User Group

Starting the OFSAA 8.0 release, with installation of every OFSAA Applications Pack, pre-configured application user groups are seeded. These user groups are unique to every OFSAA Applications Pack and have application roles pre-configured.

User Groups seeded with the OFS ECM Application Pack are listed in [Table 6–1](#).

**Table 6–1 Seeded User Groups**

Name	Description
Modeler Group	User mapped to this group have access to all the menu items for Enterprise modeling, but do not have authorization rights for sandbox population, model deployment and modeling technique authorization.
Modeling Administrator Group	User mapped to this group have access to all the menu items for Enterprise modeling and authorization rights for sandbox population, model deployment and modeling technique authorization.

**Table 6–1 Seeded User Groups**

Name	Description
Inline Processing Admin Group	User mapped to this group have access to all the menu items and actions for Inline Processing module.
Business Administrator	User mapped to this group have access to all the menu items and actions for advanced operations of metadata objects.
Business Authorizer	User mapped to this group have access to all the menu items and actions for authorization of changes to metadata objects.
Business Owner	User mapped to this group have access to all the menu items and actions to read and write metadata objects
Business User	User mapped to this group have access to all the menu items and actions to access and read metadata objects.
Identity Administrator	User mapped to this group have access to all the menu items to manage User entitlements, User Group Entitlements and Access Management configurations.
Identity Authorizer	User mapped to this group have access to all the menu items to authorize User entitlements, User Group Entitlements and Access Management configurations.
System Administrator	User mapped to this group have access to all menu items to manage the setup configurations.
Object Administrator	User mapped to this group have access to all menu items to manage object migration and metadata traceability using metadata browser.
Guest Group	User mapped to this group have access to certain menu items with view only access privileges.

Map the application user(s) to the respective Application User Group(s) and subsequently authorize the entitlements by logging in as SYSAUTH (System Authorizer) user.

---

**Note:** In case the User Groups related to OFS ECM are not mapped, ensure that you map it accordingly in OBIEE catalog for Statement View report.

In order to view the MIS reports in ECM Standalone, map the Case Analyst2 User Group in the Application.

---

For more information, see Mapping/Unmapping Users section from the [Oracle Financial Services Analytical Applications Infrastructure User Guide](#).

## Performing Administrative activities for OFS ECM

Access the OFS ECM UI as ECMAP Administrator and perform all the steps given in the following sections of the Administration Guide.

- About Configuring Access Control Metadata
- Mapping Users To Access Control Metadata
- About Scenario Manager Login Accounts
- About Changing Passwords for System Accounts
- About Configuring File Type Extensions



- About Configuring File Size
- About Configuring Status To User Role Table

---

---

**Note:** Once Security Attributes mapping is completed for the ECMAP Administrator user, restart OFSAAI and Web Application servers before accessing the Admin Tools application.

---

---

## Performing Configurations for OFS ECM

Access the OFS ECM UI as ECMAP Administrator and perform all the steps given in the following sections of Configuration Guide.

- Configuring the Base Time Zone
- Configuring the Default Currency Code
- Configuring E-mail
- Configuring XML Export
- Configuring Case Correlation Owner
- Configuring Default Case Owner

## Setting OFS ECM UI as Home Page of OFSAAI for a Particular User

To set OFS ECM UI as home page of OFSAAI, follow these steps:

1. Log in as an ECM Administrator/Supervisor user.
2. Navigate to Home page.
3. Click on logged in user name in the right top corner.
4. Click **Preferences** and a new page is displayed.
5. Select Enterprise Case Management as your default page and click **Save**.



---

---

## Post Installation Configuration

On successful installation of the Oracle Financial Services Enterprise Case Management Application Pack, see the following post installation sections:

This chapter includes the following sections:

- [Deploying OFS ECM Application Pack](#)
- [Deploying Analytic Reports and Threshold Analyzer](#)
- [Deploying Create JSON Service and Commongateway Service](#)
- [Configuring Resource Reference](#)
- [Configuring Web application server](#)
- [Configurations for Java 8](#)
- [Enabling Unlimited Cryptographic Policy for Java](#)

---

---

**Note:** Ensure to clear the application cache prior to the deployment of Applications Pack Web Archive. This is applicable to all Web servers (WebSphere, WebLogic, and Tomcat). For more information, see the [Clearing Application Cache](#) section.

---

---

### Deploying OFS ECM Application Pack

To create and deploy the Applications Pack web archive, follow these steps:

1. Navigate to the `$FIC_WEB_HOME` directory.
2. Execute the command:  

```
./ant.sh
```
3. This will trigger the creation of EAR/WAR file - `<contextname>.<extn>`. Here `<contextname>` is the context name given during installation.

---

---

**Note:** Creating ear/war files are done by the installer automatically. If the files are not created, user can execute these steps.

---

---

4. On completion of the EAR/WAR files creation, the "BUILD SUCCESSFUL" and "Time Taken" message is displayed and you are returned to the prompt.
5. The EAR/WAR file - `<contextname>.<extn>` - is created under "`$FIC_WEB_HOME`" directory.

---

---

**Note:** This process overwrites any existing version of EAR/WAR file in the path. If the web application server is Apache Tomcat, the file created would be <contextname>.war.

---

---

6. Deploy the generated EAR/WAR file on to the web application server. For detailed information, see [Deploying EAR/WAR File](#).

## Deploying Analytic Reports and Threshold Analyzer

This section explains how to deploy Analytics on Oracle Business Intelligence Enterprise Edition (OBIEE) and integrate Analytic Reports and Threshold Analyzer in the OFSECM UI.

This section includes the following topics:

- [Installing OBIEE Server](#)
- [Installing OBIEE Windows Administration Client](#)
- [Disabling the Cache Feature in OBIEE Server](#)
- [Change Default Repository Password](#)
- [Configuring OBIEE Connection Pool](#)
- [Deploying OFS ECM Report Analytics](#)
- [Configuring TreeMap Graph](#)
- [Disable Single Sign On](#)
- [Accessing Reports through OFS ECM Application](#)

## Installing OBIEE Server

To install the Oracle Business Intelligence Enterprise Edition (OBIEE) server, see [Oracle Business Intelligence Enterprise Edition 12.2.1.3.0](#). After installation, get the Enterprise Manager URL, Username, Password, and OBIEE installed directory from the system administrator.

---

---

**Note:**

1. You should map BI Admin Reporter Role with atomic schema INFODOM
  2. BI Admin Reporter Role should be mapped to any group(for example, CASESUPERVISOR) that you need to provide.
- 
- 

## Installing OBIEE Windows Administration Client

To install the OBIEE repository administration client for Windows machine, see [Oracle Business Intelligence Enterprise Edition 12.2.1.3.0](#).

The OBIEE repository administration client can be downloaded from running OBIEE setup from the following URL:




<protocol>://<OBIEE Server Name>:<OBIEE Analytics port>/analytics

From LHS menu, click **Download BI Desktop tools** under the Most Popular section.

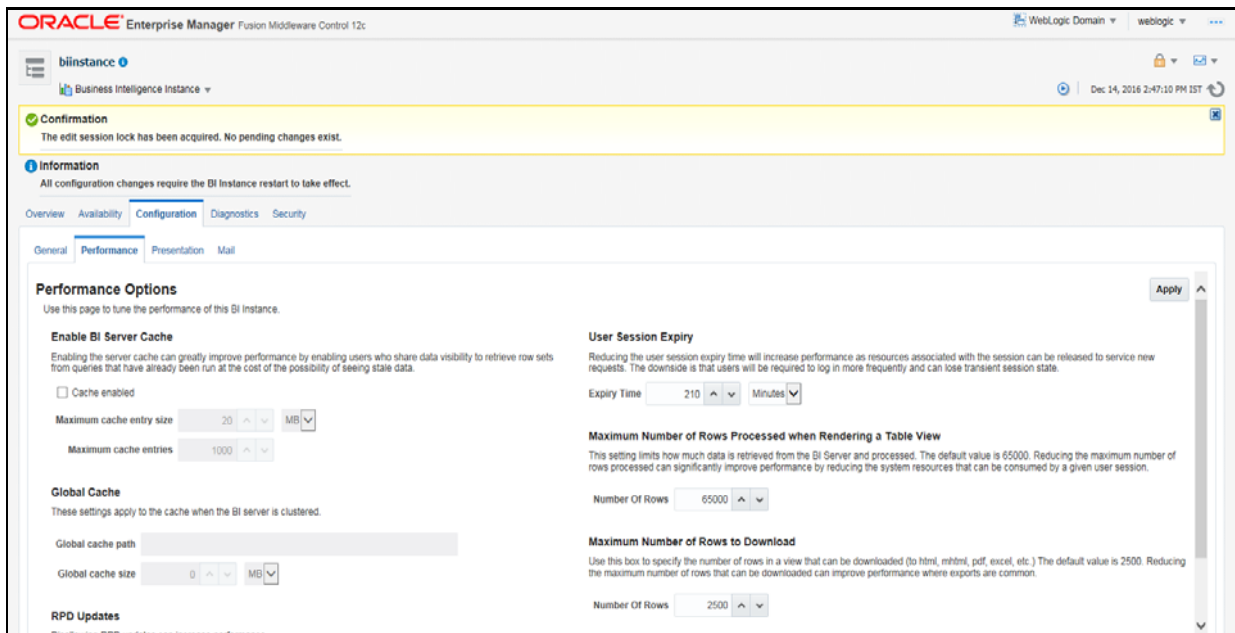
## Disabling the Cache Feature in OBIEE Server

### OBIEE 12.2.1.3.0:

Login to the Enterprise Manager and perform the following steps:

1. Click the Target Navigation icon 
2. Expand the Business Intelligence section and then click **biinstance**.
3. Click the **Configuration** tab.
4. Click the Lock icon  and then click Lock & Edit to enable the Cache Enabled check box.
5. Under the Enable BI Server Cache section, deselect the Cache Enabled check box and make the required changes
6. Click the Lock icon  and then click Release Configuration to save the changes made.

**Figure 7–1 Disabling the Cache Feature in OBIEE Server (12.2.1.3.0)**



## Change Default Repository Password

### OBIEE 12.2.1.3.0:

Copy FCCM807.rpd from \$FIC\_HOME/OBIEE/Repository to the Windows machine where the OBIEE Windows administration client is installed.

To change the default password for the repository follow these steps:

1. Open the Repository using the OBIEE Windows administration client from Windows machine. From the File menu, select Open and click Offline. Browse to the Repository on Windows machine. The Oracle BI Administration Tool - FCCM807.rpd windows is displayed.

2. Enter default Repository password: **FCCM\$807**

To change the default password, follow these steps:

1. From File menu, choose **Change Password**.
2. Enter the new password and click **OK**.

## Configuring OBIEE Connection Pool

### OBIEE 12.2.1.3.0:

To configure the Connection Pool of the repository, follow these steps:

1. Open the same Repository (as in the previous step) on the Windows machine. The Oracle BI Administration Tool - FCCM807 . rpd windows is displayed.
2. Expand the FCCM folder in the Physical section.
3. Double-click Connection Pool to open the Connection Pool Properties window.
4. Enter the following in the Data Source Name text box of the Connection Pool Properties window after modifying <Database Server Host Name> and <Database Name> Data Source Name =  
(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP)(HOST=<Database Server HostName>)(PORT=1521))(CONNECT\_DATA=(SERVER=DEDICATED)(SERVICE\_NAME=<Database Name>)))
5. Enter the Atomic Schema user in the User name text box.
6. Enter the Atomic Schema user password in the Password text box.
7. Click OK.
8. Expand the folder and test connection for any one table name by Right Click > view data.
9. Perform similar changes in the Connection Pools for all remaining folders in the Physical Layer by providing the following schema details for all Connection Pools:
  - KYC Analytics >Atomic Schema

---

---

**Note:** Initial block and connection pool: both should point towards the atomic schema.

---

---


- UIC\_73 > CaseMng connection pool ->Atomic Schema
  - UIC\_73 > Security connection pool->Atomic Schema
  - TA > Atomic Schema
  - CTRBI-> Atomic Schema
  - ORCL->Atomic Schema
  - FCCM > Atomic Schema
10. Select **Save** option from the File menu. The following message is displayed: *Do you want to check global consistency?*
  11. Click **Yes**. The following message is displayed: *Consistency check didn't find any errors, warning or best practices violations.*
  12. Click **OK**.

## Deploying OFS ECM Report Analytics

### OBIEE 12.2.1.3.0:

To deploy Analytic Reports, follow these steps:

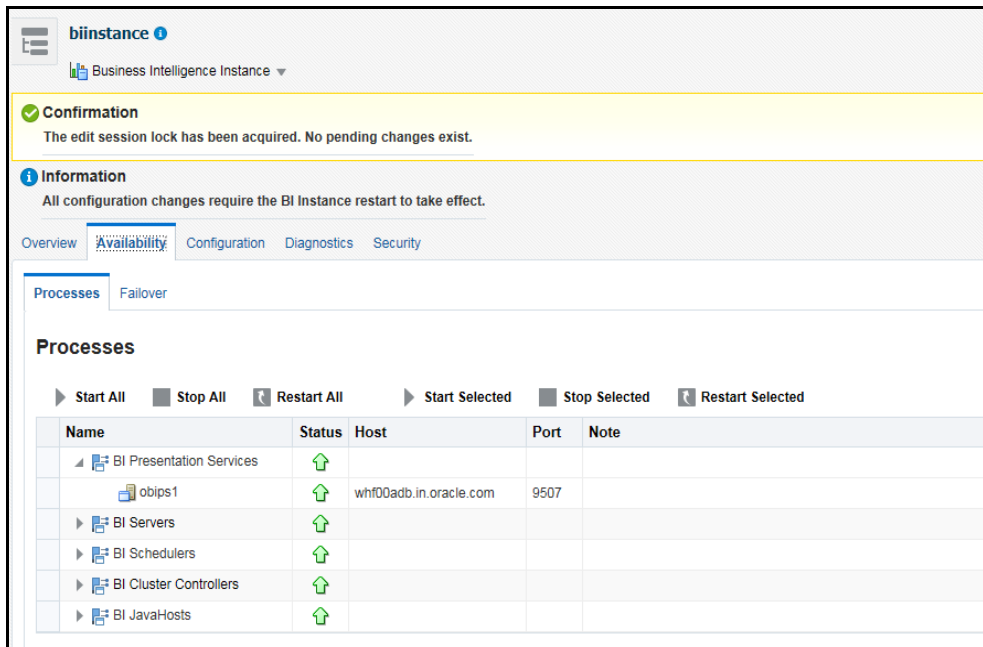
1. Change the value in `Nqsconfig.ini` file located at `<FMW_HOME>/user_projects/domains/bi/config/fmwconfig/biconfig/OBIS`  
 From `EVALUATE_SUPPORT_LEVEL = 0;`  
 To `EVALUATE_SUPPORT_LEVEL = 2;`
2. Copy the `FCCM807.rpd` file in the working directory.
3. Navigate to the working directory and execute the following script:  

```
<obiee_home>/user_projects/domains/bi/bitools/bin/datamodel.sh uploadrpd -I FCCM806.rpd -SI ssi -U <user> -P <password>
```
4. Restart OBIEE server from Enterprise Manager by following these steps: (see figure [Restarting OBIEE Server](#))
5. Click the Target Navigation icon 
6. Expand the Business Intelligence section and then click `biinstance`.
7. Click the Availability tab.
8. Click **Stop All**.
9. Copy the file `FCCM_ANALYTICS.bar` in the same working directory and execute the following script:  

```
<obiee_home>/oracle_common/common/bin/wlst.sh
```
10. A new prompt `wls:/offline>` is displayed. Execute the following script:  

```
importServiceInstance('<obiee_home>/user_projects/domains/bi','ssi','<Working directory>/FCCM_ANALYTICS.bar',importRpd=false,importWebcat=true,importJazn=true,includeCredentials=None)
```
11. Click **Start All**.

Figure 7-2 Restarting OBIEE Server



## Configuring TreeMap Graph

To configure the TreeMap Graph, follow these steps:

1. Login to OBIEE server.
2. Navigate to OBIEE Home.

---

**Note:** OBIEE Home is the OBIEE installed path.

---

3. Execute the following command:
 

```
cd <obiee_home>
```
4. Execute the following command to find the available `treemap-canvas.js`:
 

```
find -name treemap-canvas.js
```

Four different files, all named `treemap-canvas.js` are displayed.
5. Back up these four files.
6. Edit `window.top.console` to `console` in these four files and save.

## Disable Single Sign On

Execute the following to disable Single Sign On:

```
<obiee_Home>/oracle_common/common/bin/wlst.sh
disableBISingleSignOn('<obiee_Home>/user_projects/domains/bi')
```



## Accessing Reports through OFS ECM Application

For more information on Accessing Reports, see the [Alert Management User Guide](#).

## Deploying Create JSON Service and Commongateway Service

Follow the below steps:

1. Navigate to `$FIC_HOME/CommonGateway`.
2. Trigger the `ant .sh` file.
3. `createJSONService.war` and `CommonGatewayService.war` would be generated in the same path.
4. Deploy the generated WAR file on to the web application server. For more information, see [Creating and Deploying EAR/ WAR File](#).

## Configuring Resource Reference

This section describes the details for configuring the resource reference in WebSphere, WebLogic, and Tomcat Application Servers. For detailed information, see [Configuring Resource Reference](#).

## Configuring Web application server

This section describes the details to configure the different web application servers for OFSAA Infrastructure deployment namely, IBM WebSphere, Oracle WebLogic, and Apache Tomcat Servers. For detailed information, see [Configuring Web application servers](#).

## Configurations for Java 8

Follow these steps to extract and apply the patch.

1. Follow the instructions given in the Readme to apply the patch.
2. If the Oracle Database version is 12c, copy `ojdbc7.jar` from `$ORACLE_HOME/jdbc/lib` to the following locations:
  - `$FIC_HOME/utility/OFSAGenerateRepository/lib/`
  - `$FIC_HOME/realtime_processing/WebContent/WEB-INF/lib/`
  - `$FIC_HOME/ficdb/lib/`
  - `$FIC_HOME/ficapp/icc/lib/`
  - `$FIC_HOME/ficapp/common/FICServer/lib/`
  - `$FIC_HOME/FMstandalone/FormsManager/WEB-INF/lib/`
  - `$FIC_HOME/ficweb/webroot/WEB-INF/lib/`

---

**Note:** If `ojdbc6.jar` is already present in any of the aforementioned folders, you need to remove it.

---

3. If the Oracle Database version is 11g, copy `ojdbc6.jar` from `$ORACLE_HOME/jdbc/lib` to the following locations:
  - `$FIC_HOME/utility/OFSAGenerateRepository/lib/`
  - `$FIC_HOME/realtime_processing/WebContent/WEB-INF/lib/`
  - `$FIC_HOME/ficdb/lib/`
  - `$FIC_HOME/ficapp/icc/lib/`
  - `$FIC_HOME/ficapp/common/FICServer/lib/`
  - `$FIC_HOME/FMStandalone/FormsManager/WEB-INF/lib/`
  - `$FIC_HOME/ficweb/webroot/WEB-INF/lib/`

## Enabling Unlimited Cryptographic Policy for Java

Enabling unlimited cryptographic policy for Java enables you to use AES-256 keys for encryption. The JCE Policy JAR files, for the current Java versions required for OFSAA and also for later versions, are available in the following link:

[https://bugs.java.com/view\\_bug.do?bug\\_id=JDK-8170157](https://bugs.java.com/view_bug.do?bug_id=JDK-8170157)

For Java versions, where unlimited cryptographic policy is not enabled by default, perform the following steps to enable:

1. Download the JCE Policy related JARs `local_policy.jar` and `US_export_policy.jar`.
  - For Oracle Java, download it from <http://www.oracle.com/technetwork/java/javase/downloads/jce-7-downloads-432124.html>.
  - For IBM Java, download it from <https://www14.software.ibm.com/webapp/iwm/web/preLogin.do?source=jcesdk>.
2. Copy (or replace) the downloaded JCE Policy related JARs `local_policy.jar` and `US_export_policy.jar` into the `/jre/lib/security` directory of Java installation directory used for OFSAAI and the Web Application Servers.

---

---

## Configuring Web server

This section covers the following topics:

- [Configuring Web server](#)
- [Configuring Web application servers](#)

### Configuring Web server

This step assumes the installation of a Web server exists as per the prerequisites.

See the product specific installation guide to install and configure the Web server. If an installation already exists, skip and proceed to the next step.

---

---

**Note:**

- Make a note of the IP Address/ Hostname and Port of the web server. This information is required during the installation process.
  - Add `umask 0027` in the `.profile` of the UNIX account which manages the WEB server to ensure restricted access permissions
  - See Oracle Financial Services Analytical Applications Infrastructure Security Guide mentioned in the [Related Documents](#) section for additional information on securely configuring your Web server.
- 
- 

### Configuring Web application servers

This step assumes an installation of a web application server exists as per the prerequisites. To configure the Web application server for OFSAA Deployment see the following sections.

This section includes the following topics:

- [Configuring WebSphere Application Server for Application Deployment](#)
- [Configuring WebLogic for Application Deployment](#)
- [Configuring Apache Tomcat Server for Application Deployment](#)

---

**Note:**

- Make a note of the IP Address/ Hostname and Port of the web application server. This information is required during the installation process (required if Web server is not configured).
  - See OFSAA Secure Configuration Guide/ Security Guide mentioned in the Related Documents section for additional information on securely configuring your Web server.
- 

## Configuring WebSphere Application Server for Application Deployment

You can deploy multiple OFSAA applications on different profiles of a stand-alone WebSphere application server. To create multiple WebSphere "Profiles" in a stand-alone server, use the command line option as explained in the following section. A profile is the set of files that define the runtime environment. At least one profile must exist to run WebSphere Application Server.

This section covers the following topics:

- [Configuring WebSphere before Application Deployment](#)
- [Creating New Profile in WebSphere](#)
- [Managing IBM WebSphere SDK Java Technology Edition Versions](#)
- [Deleting WebSphere Profiles](#)
- [Configuring WebSphere Shared Library to Support Jersey 2x and Jackson 2.9x Libraries](#)
- [Configuring WebSphere HTTPS](#)
- [Configuring WebSphere Memory Settings](#)
- [Configuring WebSphere for REST Services Authorization](#)
- [Configuring Application Security in WebSphere](#)

### Configuring WebSphere before Application Deployment

1. Navigate to web.xml file in the <FIC\_HOME>/ficweb/webroot/WEB-INF path.
2. Add **com.ofs.aai.rest.v1.impl.WSService;com.ofs.aai.rest.v1.service.wf.PMFService** as shown:

```
<param-value>com.ofs.aai.rest.v1</param-value>
</init-param>

<init-param>
<param-name>jersey.config.server.provider.classnames</param-name>
<param-value>com.ofs.aai.rest.v1.service.impl.UserService;com.ofs.aai.rest.v1.service.impl.FunctionService;com.ofs.aai.rest.v1.service.impl.GroupService;com.ofs.aai.rest.v1.service.impl.RoleService;com.ofs.aai.rest.v1.service.impl.Infodom;com.ofs.aai.rest.v1.report.impl.I18nService;com.ofs.aai.rest.v1.report.impl.ActionService;com.ofs.aai.rest.v1.report.impl.AuditTrailService;com.ofs.aai.rest.v1.report.impl.ReportService;com.ofs.aai.rest.v1.impl.DBDetailServices;com.ofs.aai.rest.v1.impl.LogService;com.ofs.aai.rest.v1.impl.Services;com.ofs.aai.rest.v1.impl.WSService;com.ofs.aai.rest.v1.service.wf.PMFService
</param-value>
```

3. After adding this, delete the .ear and .war file from <FIC\_HOME>/ficweb.
4. Execute .ant.sh to recreate .ear and .war files.

### Creating New Profile in WebSphere

The Profile is created in WebSphere through command line using the **manageprofiles.sh** that resides in the <WebSphere Install directory>/AppServer/bin folder.

The command to create a profile **without admin** security through command line is as follows:

```
"manageprofiles.sh -create -profileName <profile> -profilePath <profile_path> -templatePath <template_path> -nodeName <node_name> -cellName <cell_name> -hostName <host_name>"
```

Example:

```
$usr/home>./manageprofiles.sh -create -profileName mockaix
-profilePath/WebSphere/webs64/Appserver/profiles/mockaix
-templatePath/WebSphere/webs64/Appserver/profileTemplates/default
-nodename ipa020dorNode04 - cellName ipa020dorNode04Cell -hostName
ipa020dor
```

The command to create a profile **with admin** security through command line is as follows:

```
"manageprofiles.sh -create -profileName <profile> -profilePath <profile_path> -templatePath <template_path> -nodeName <node_name> -cellName <cell_name> -hostName <host_name> -enableAdminSecurity true -adminUserName <Admin User Name> -adminPassword < Admin User Password> -samplespassword <sample User Password>"
```

Example:

```
$usr/home>./manageprofiles.sh -create -profileName mockaix
-profilePath/WebSphere/webs64/Appserver/profiles/mockaix
-templatePath/WebSphere/webs64/Appserver/profileTemplates/default
-nodename ipa020dorNode04 -cellName ipa020dorNode04Cell -hostName
ipa020dor -enableAdminSecurity true -adminUserName ofsaai -adminPassword
ofsaai -samplespassword ofsaai"
```

---

**Note:** While using the `manageprofiles.sh` command to create a New Profile in WebSphere, you can also use `"-validatePorts"` to validate if the specified ports are not reserved or in use. Additionally, you can specify new ports with `"-startingPort <base port>"` which specifies the starting port number to generate and assign all ports for the profile. For more information on using these ports, see [WebSphere manageprofiles command](#).

---

### Managing IBM WebSphere SDK Java Technology Edition Versions

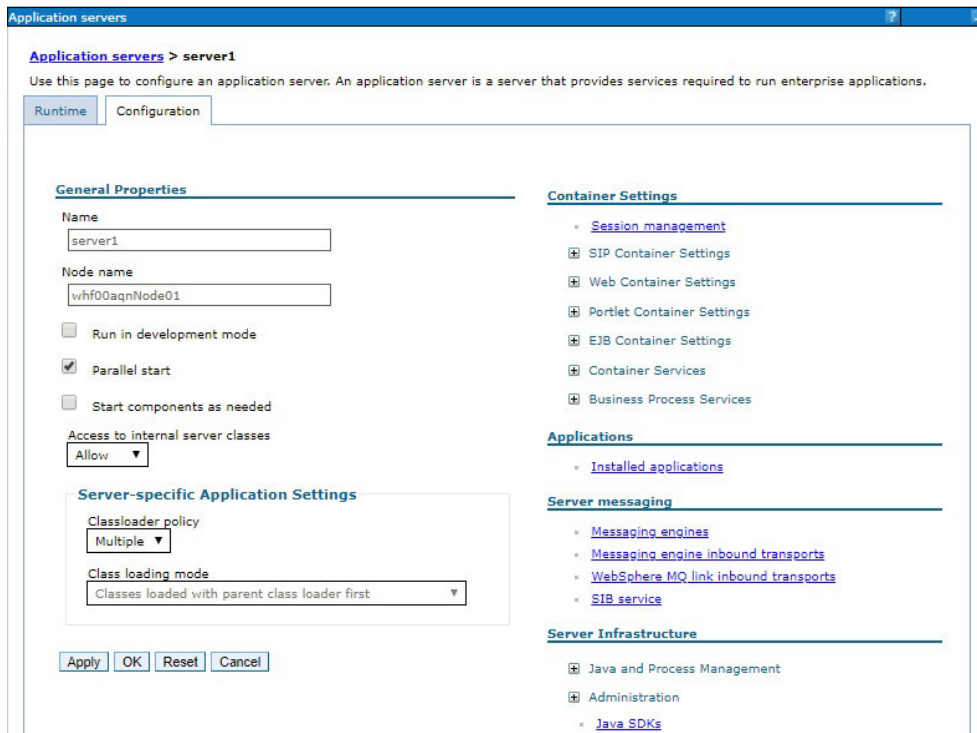
By default, WebSphere Application Server V8.5.5.X uses the Java 6.0 SDK. You must upgrade to Java 7.X SDK or JAVA 8.X SDK.

Prerequisites: Install the IBM WebSphere SDK Java Technology Edition Versions 1.7.X\_64 or 1.8.X\_64.

Perform the following steps to upgrade to Java 7.X SDK or JAVA 8.X SDK:

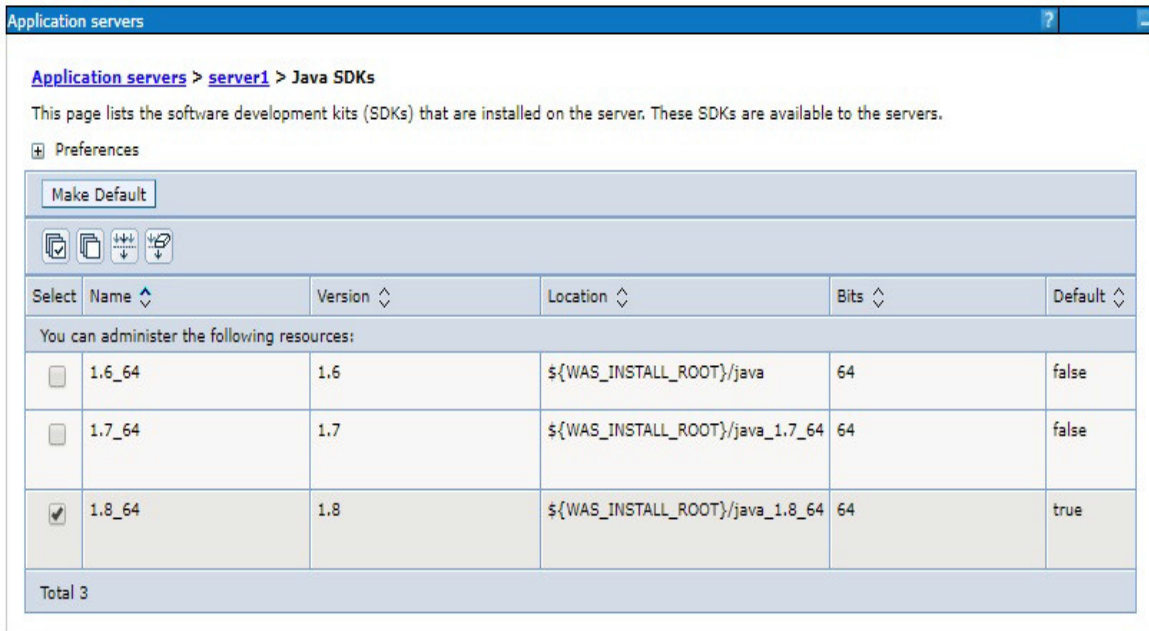
1. Enter the WebSphere URL in the format `http://HOST_NAME:PORT_NUMBER/ibm/console` (use `https` if SSL is enabled.). For example, `http://192.168.1.0:9000/ibm/console`.
2. Login with your administrator user ID and password.
3. From the LHS menu, click **Servers** to expand and view the menu.
4. Click **Server Types** to expand the menu further and then click **WebSphere Enterprise Application Servers** to view the *Application servers* window.
5. On *Application servers* window, click the required Application Server link. For example, `server1` in the following illustration:

**Figure A–1 Application Server - Java SDKs**



6. Click **Java SDKs** link from Server Infrastructure to view the list of Java SDKs.

Figure A-2 Application Server - List of Java SDKs



7. Select either **1.7\_64** or **1.8\_64** based on the JVM version with which you plan to install OFSAA or have installed with.
8. Click **Make Default** button and save to master repository.
9. Restart the WebSphere Application Server to apply the changes to the IBM application profile.

## Managing Applications in WebSphere

To manage the installed applications in WebSphere, follow these steps:

1. Open the administrator console using the following URL:

`http://<ipaddress>:<Administrative Console Port>/ibm/console`

For example: `http://10.111.222.333:9003/ibm/console` (https if SSL is enabled.)

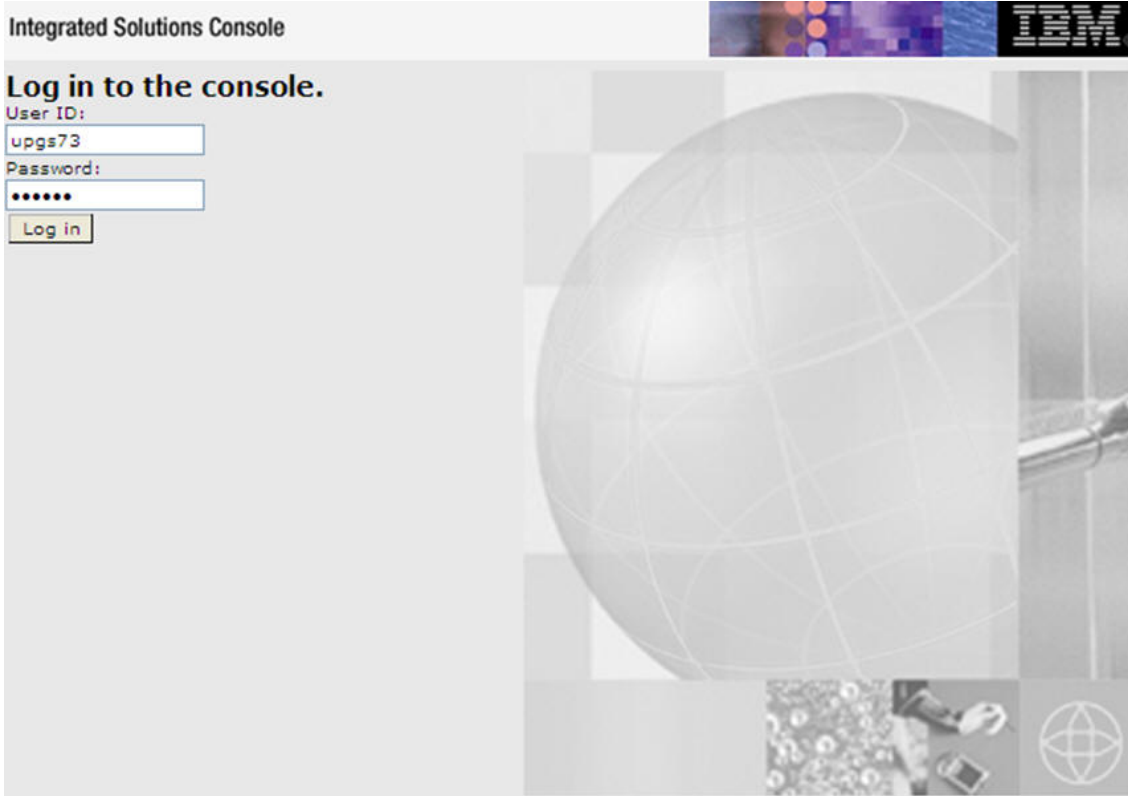
---

**Note:** Administrative Console Port value is available in `serverindex.xml` file within `<WebSphere Profile Directory>/config/cells/<Node Cell>/nodes/<Node Name>` directory.

---

The *Integrated Solutions Console Login* window is displayed.

**Figure 7-3 Integrated Solutions Console Login**

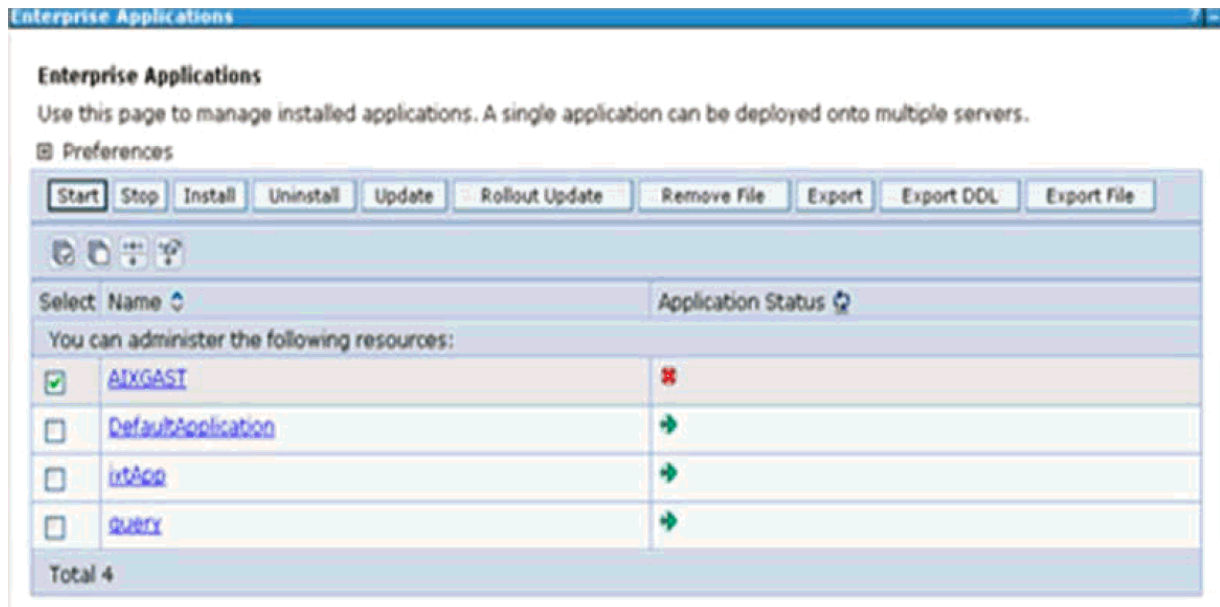


2. Log on with the **User ID** provided with the admin rights.
3. From the LHS menu, expand the **Applications > Application Type > WebSphere Enterprise Applications**.

The *Enterprise Applications* screen is displayed.



Figure 7-4 Enterprise Applications



This Enterprise Applications screen helps you to:

- Install new application
- Uninstall existing applications
- Start or Stop the installed applications

### Configuring WebSphere Application Server to Use a Load Balancer or Proxy Server

The configuration prevents the process server from redirecting to an internal port when using a load balancer or proxy server.

The following steps describe the configuration:

1. Enter the WebSphere URL in the format `http://HOST_NAME:PORT_NUMBER/ibm/console` (use `https` if SSL is enabled.). For example, `http://192.168.1.0:9000/ibm/console`.
2. Login with your administrator user ID and password.
3. From the LHS menu, click **Servers** to expand and view the menu.
4. Click **Server Types** to expand the menu further and then click **WebSphere Enterprise Application Servers** to view the *Application servers* window.
5. On *Application servers* window, click the required Application Server link. For example, server1 in the following illustration:

**Figure A–3 Application Servers - Load Balancer Proxy Server**

6. Click **Web Container Settings > Custom Properties**.
7. Add the following properties:
  - Name: trustheaderport  
Value: true
  - Name: com.ibm.ws.webcontainer.extractHostHeaderPort  
Value: true
8. Restart the WebSphere Application Server to apply the changes.

### **Deleting WebSphere Profiles**

To delete a WebSphere profile, follow these steps:

1. Select the checkbox adjacent to the required application and click **Stop**.
2. **Stop** the WebSphere profile to be deleted.
3. Navigate to WebSphere directory:

```
<WebSphere_Installation_Directory>/AppServer/bin/
```

4. Execute the command:

```
manageprofiles.sh -delete -profileName <profile_name>
```

5. Delete profile folder.

Example: <WebSphere\_Installation\_Directory>/AppServer/profiles/<profile\_name>

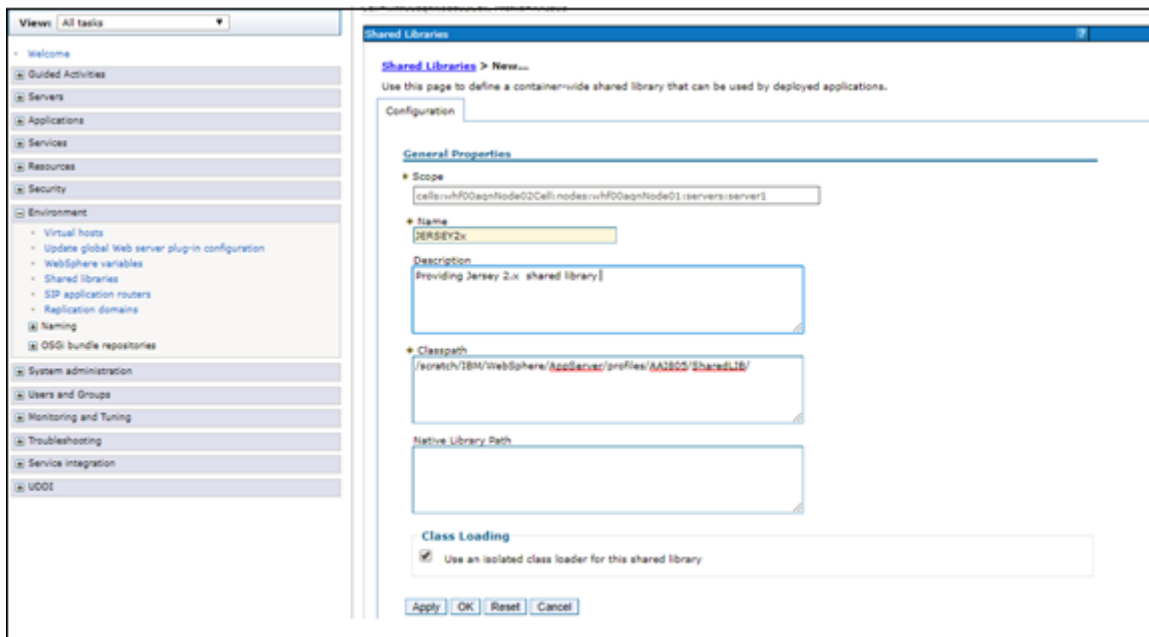
6. Execute the command:

```
manageprofiles.sh -validateAndUpdateRegistry
```

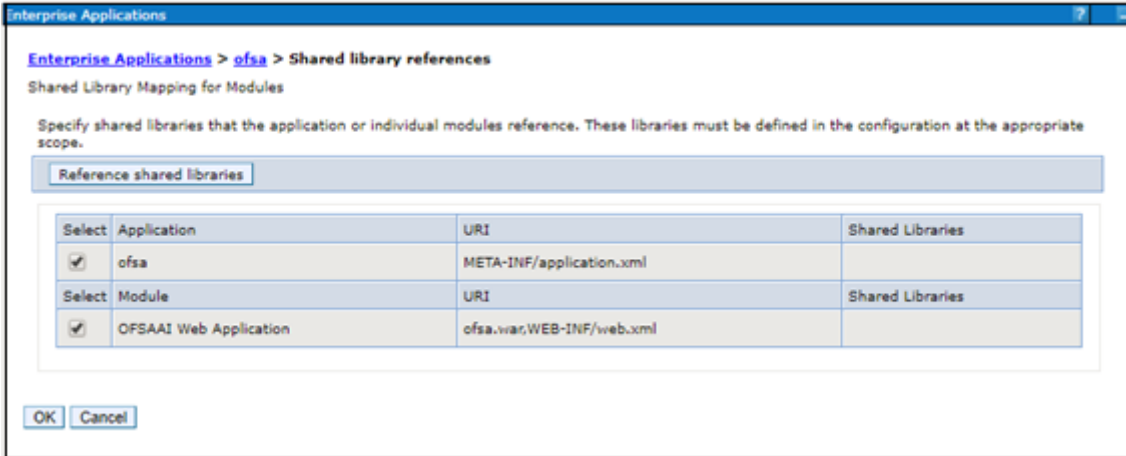
### **Configuring WebSphere Shared Library to Support Jersey 2x and Jackson 2.9x Libraries**

Perform the following configuration to set WebSphere shared library to support jersey 2x and Jackson 2.9x libraries.

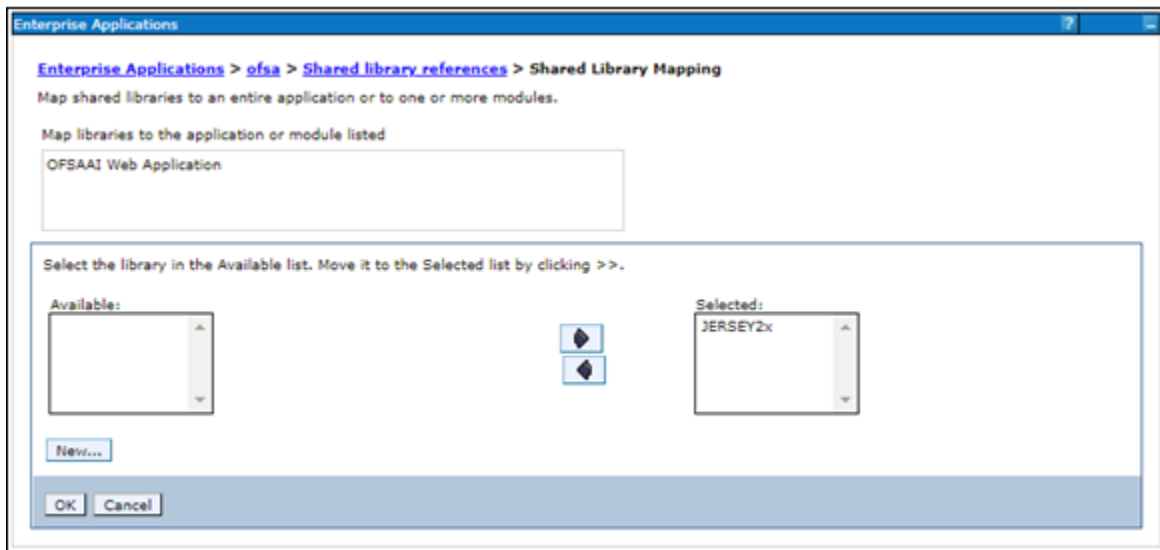
1. Click **Environment** from the menu on the left to expand and view the list. Click **Shared Libraries** to open the *Shared Libraries* window.



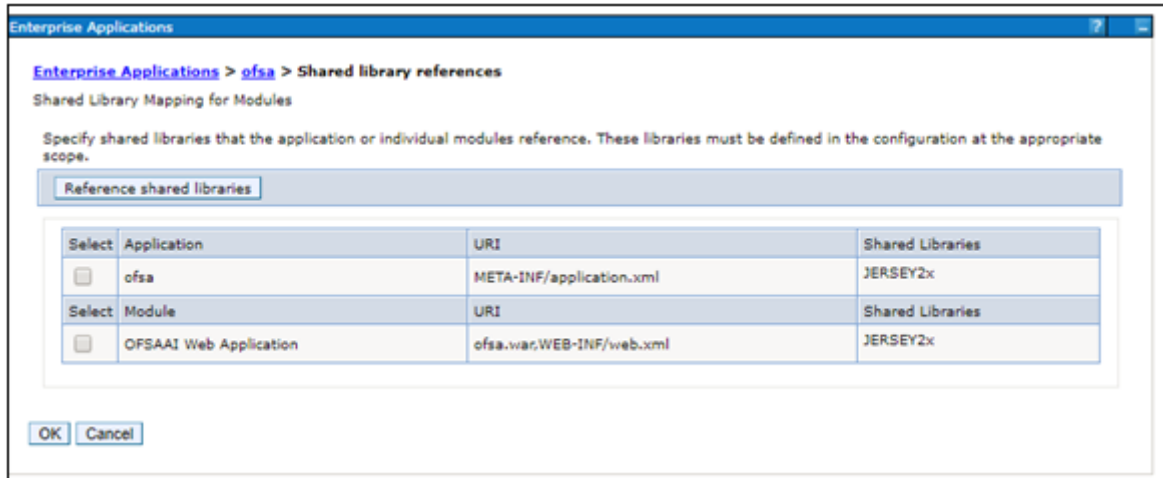
2. Enter details as shown in the following:
  - **Name:** Enter a unique identifiable name.
  - **Description:** Enter a valid description.
  - **Classpath:** Enter the absolute path where the JARs related to Jersey 2.x and Jackson 2.9x are copied. These jars are available in the <OFSAA\_HOME>/utility/externallib/WEB-INF/lib directory after creation of the EAR file.
3. Select **Use an isolated class loader for this library**.
4. Click **OK** to save to master configuration.
5. Select the application or module and map the shared libraries. Click **OK**. In the following illustration, **ofsa** is selected.



- From the Shared Library Mapping window, move the required shared libraries from **Available** to **Selected**. In the following illustration, **JERSEY2x** is selected.



- Click **OK**.
- Similarly, select the next application or module and repeat the procedure from steps 5 to 7.



9. Disable the built-in JAX-RS via JVM property.
  1. Go to WebSphere admin console in **Servers > WebSphere Application Servers > yourServerName**.
  2. In **Server Infrastructure** section, go to **Java and Process Management > Process definition > Java Virtual Machine > Custom properties**.
  3. Add the following property:
 

```
com.ibm.websphere.jaxrs.server.DisableIBMJAXRSEngine=true
```
10. Restart the application.

## Configuring WebSphere HTTPS

To configure an HTTPS Transport on WebSphere, follow these steps:

1. Create a profile using the Profile Creation Wizard in WebSphere.

---

**Note:** Note down the https port specified during this process and use the same as servlet port or web server port during OFSAAI installation.

---

2. To enable https configuration on Infrastructure, assign value 1 to "HTTPS\_ENABLE" in OFSAAI\_InstallConfig.xml for Silent mode OFSAAI installation.

## Configuring WebSphere Memory Settings

To configure the WebSphere Memory Settings, follow these steps:

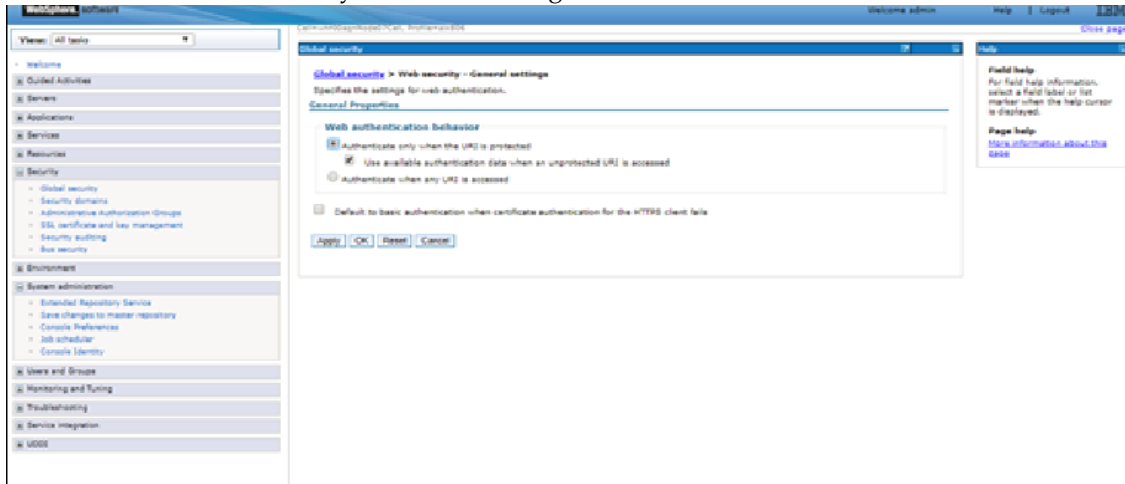
1. Navigate to WebSphere applications server > Application servers > server1 > Process definition > Java Virtual Machine.
2. Change the memory setting for Java Heap:
 

```
Initial heap size = 512
Maximum heap size = 3072
```

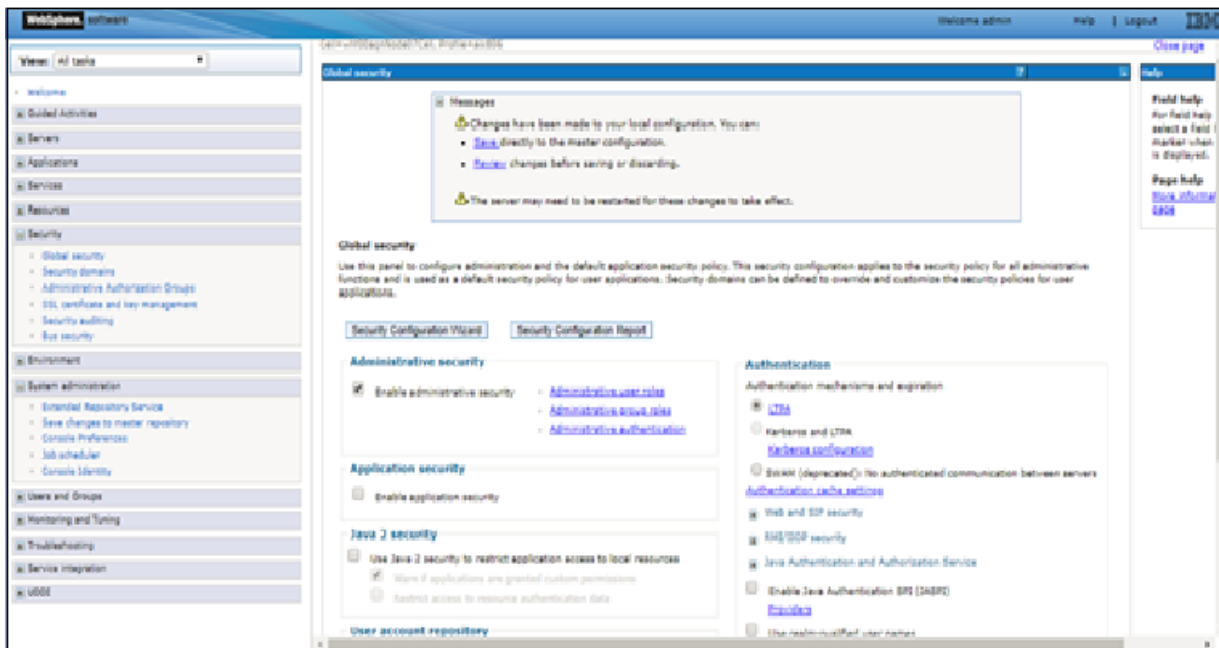
## Configuring WebSphere for REST Services Authorization

Configure the following in WebSphere to enable REST API authorization by OFSAA:

1. Log on to WebSphere console with the **User ID** provided with the admin rights.
2. Expand Security menu in the LHS and click Global security > Web and SIP security > General settings.



3. De-select the **Use available authentication data when an unprotected URI is accessed** checkbox.
4. Click **OK**.



5. Click **Save** to save the changes to master configuration.

## Configuring Application Security in WebSphere

This is a mandatory security procedure for WebSphere to restrict the unauthorized access of configuration files in directories. For detailed information, see the [Oracle Financial Services Analytical Applications Infrastructure Security Guide](#).

## Configuring WebLogic for Application Deployment

You can deploy multiple Infrastructure applications on different domains of a stand-alone WebLogic application server. To create multiple WebLogic "Domains" in a stand-alone server you can use the Domain Creation wizard. A domain is the set of files that define the runtime environment. At least one domain must exist to run WebLogic Application Server.

---

**Note:** For deployment on Oracle WebLogic Server 12.1.3+ (64 bit) with Java 8, download and install patch 18729264 from <http://support.oracle.com/>.

Following configuration is required only if OFS Big Data Processing is licensed and enabled in your OFSAA instance and OFSAA is deployed on Oracle WebLogic Server version 12.2.x:

- The jersey-server-1.9.jar file should be copied to <HIVE\_LIB\_PATH> path.
- 

This section covers the following topics:

- [Creating Domain in WebLogic Server](#)
- [Deleting Domain in WebLogic](#)
- [Configuring WebLogic Memory Settings](#)
- [Configuring WebLogic for REST Services Authorization](#)

### Creating Domain in WebLogic Server

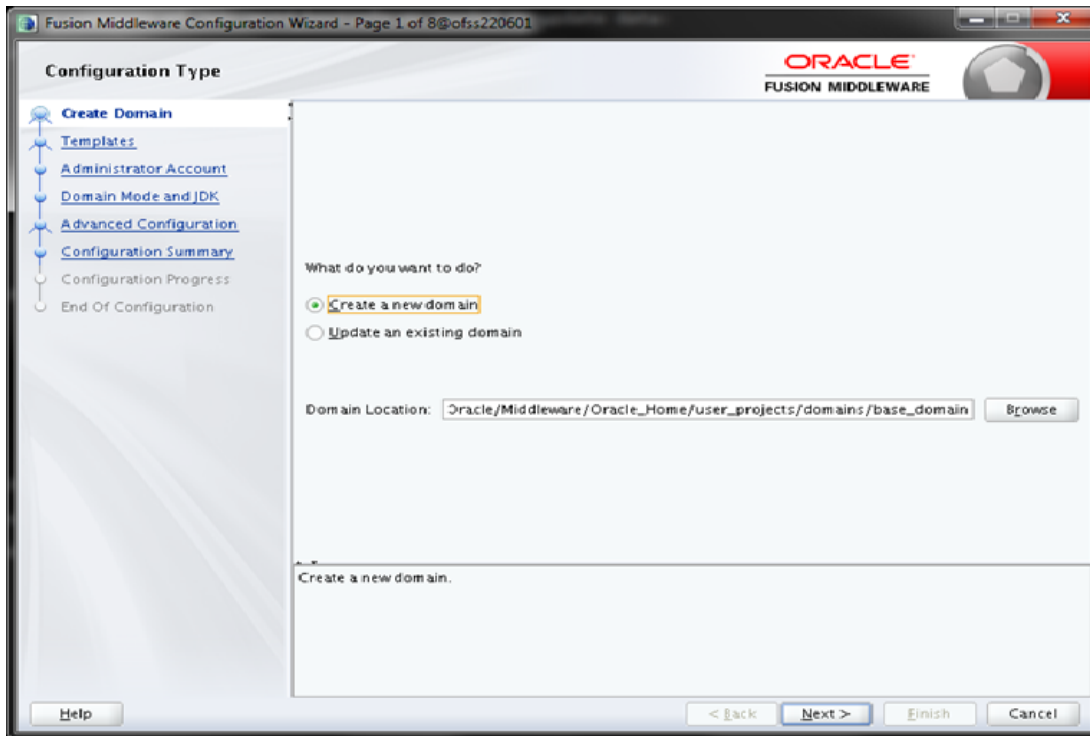
To create a new domain using Configuration Wizard in WebLogic, follow these steps:

1. Navigate to the directory <WLS\_HOME>/wlserver/common/bin and execute the command:

```
./config.sh
```

The Configuration Type window of the Configuration Wizard is displayed.

Figure 7-5 Configuration Type

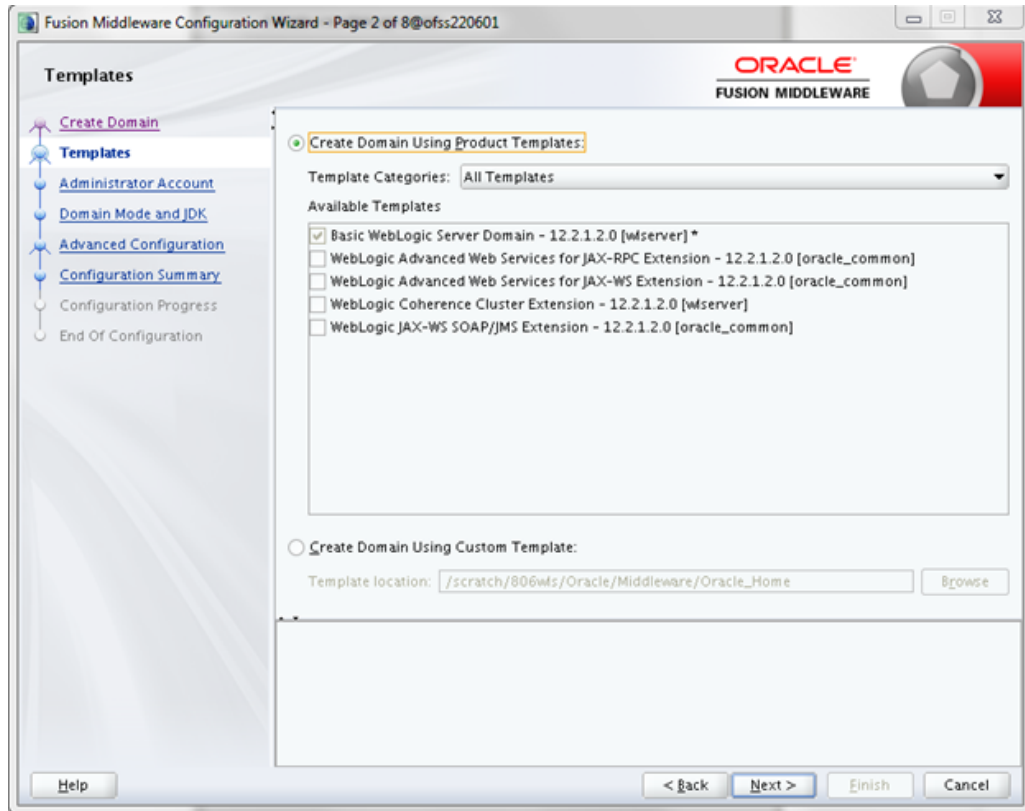


2. Select **Create a new domain** option and click **Next**.

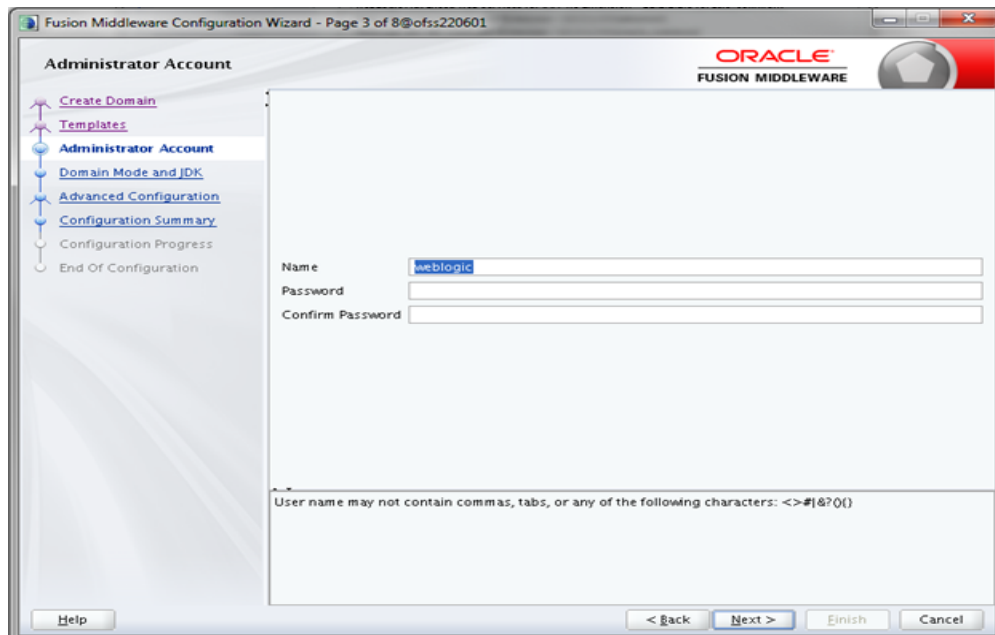
The **Templates** window is displayed.

**Templates**



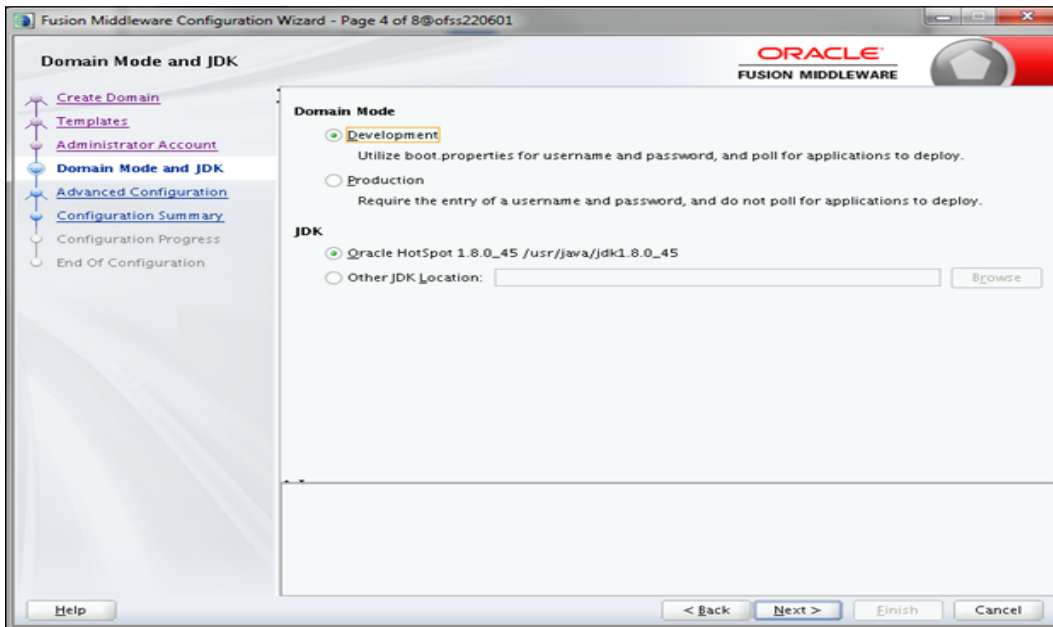


3. Select the **Create Domain Using Product Templates** option and click **Next**.  
The *Administrator Account* window is displayed.  
Administrator Account



4. Enter the user name to be assigned to the administrator, the password and confirm the password. Click **Next**.

The *Domain Mode and JDK* window is displayed  
Domain Mode and JDK



5. Select from the following options:

In the Domain Mode section, select the required mode (Development or Production).

In the JDK section, select the required option. If you select Other JDK Location, click Browse, navigate to the JDK location, and select. Click Next.

The Advanced Configuration window is displayed.

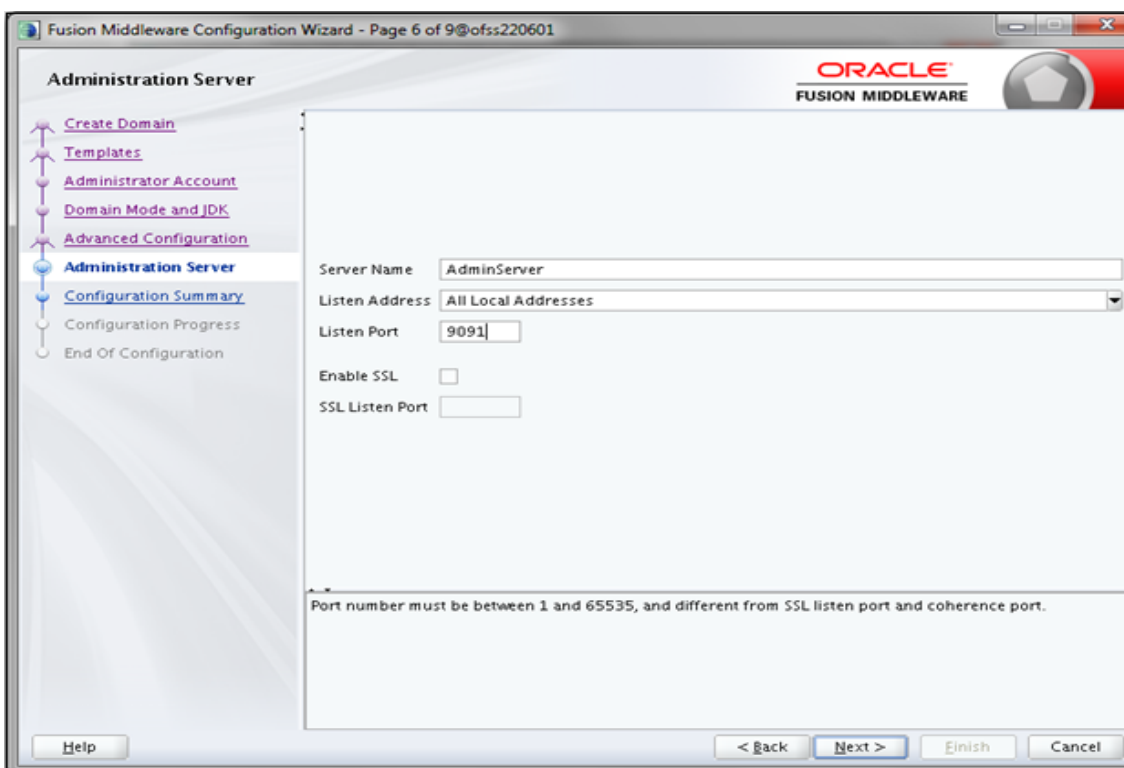
Figure A-4 Advanced Configuration



6. Select Administration Server. A WebLogic Server domain must have an Administration Server. You can also select Manages Servers, Clusters and Machines and RDBMS Security Store, if required. Click Next.

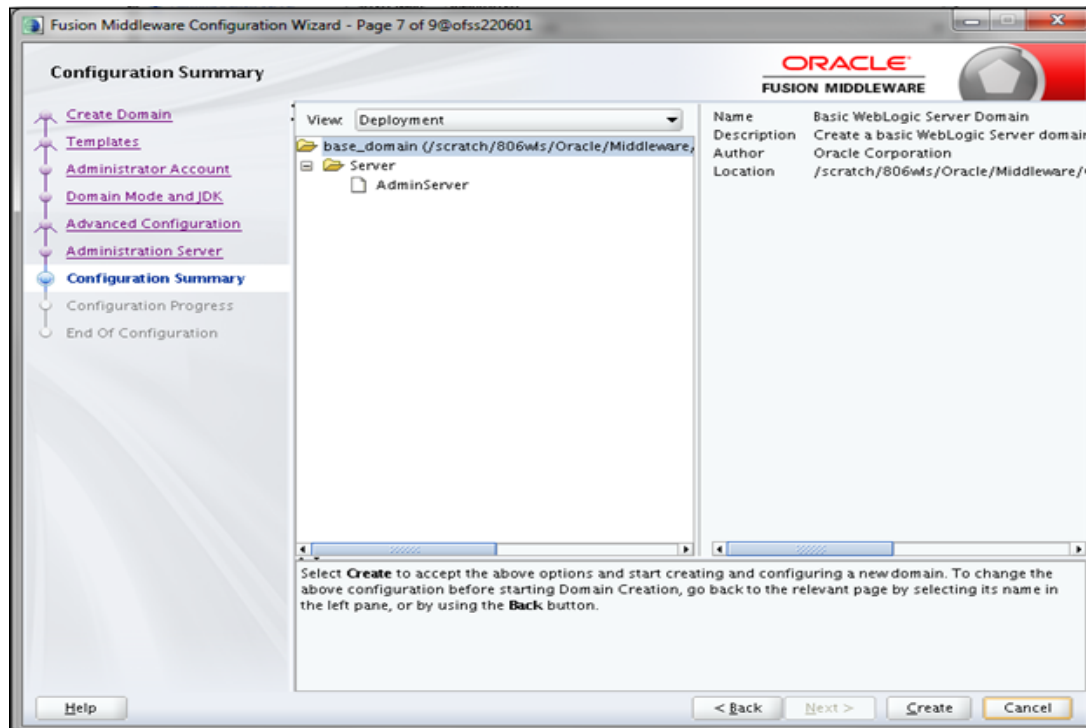
The Administration Server window is displayed.

Figure A-5 Administration Server



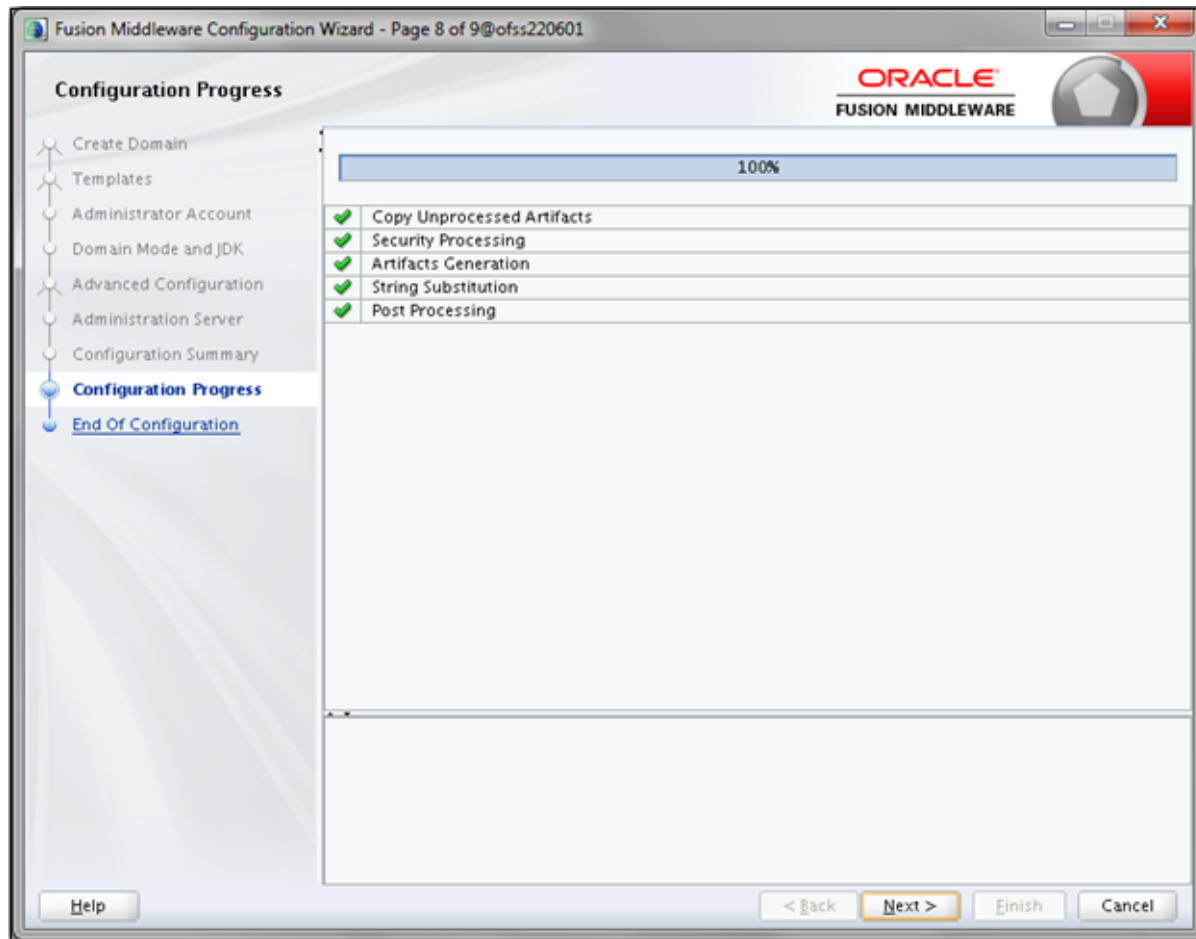
7. Enter Administration Server details such as the Server Name, Listen address, Listen Port, Enable SSL(for secure login using https, select this check box), and SSL listen port. Click Next.

The Configuration Summary window is displayed.



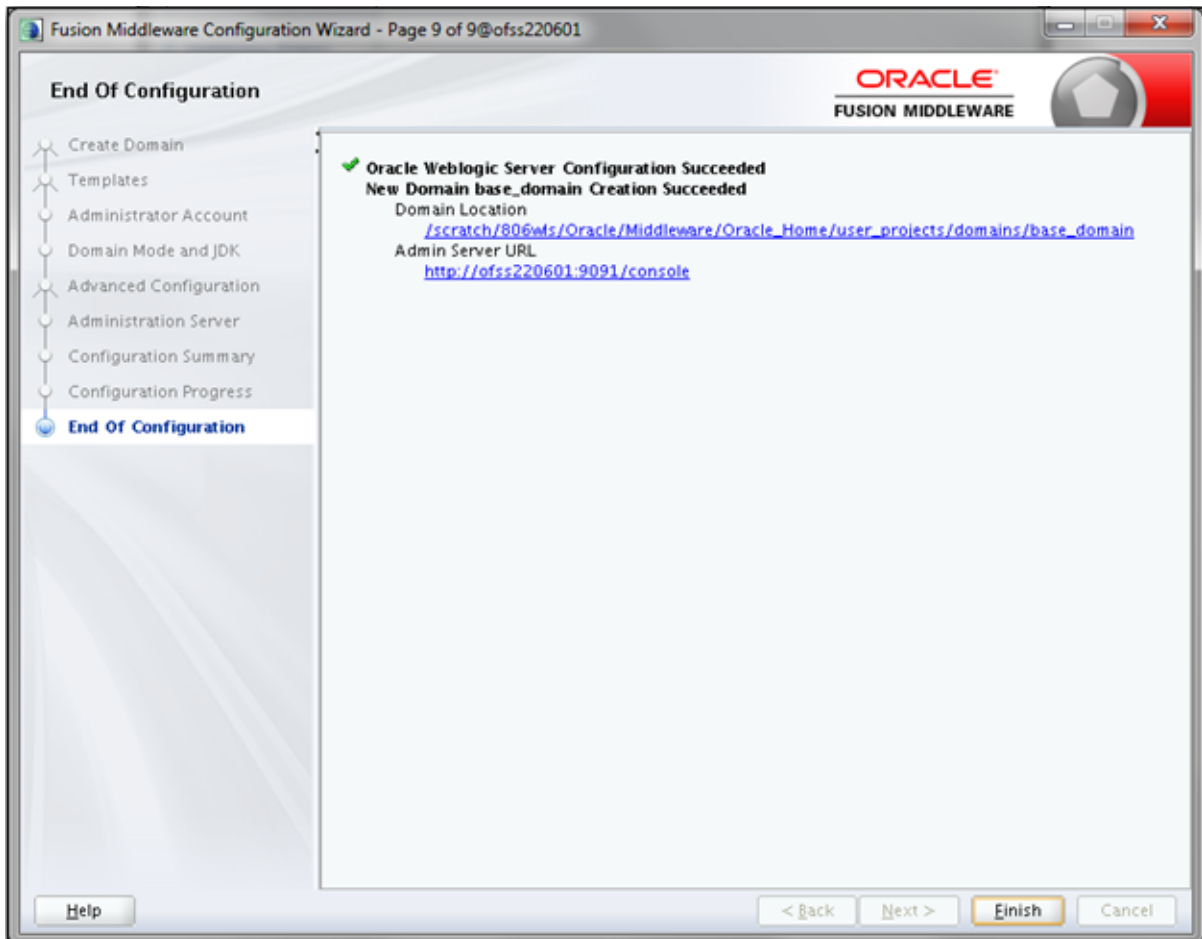
8. Verify the configuration details of the WebLogic domain and click Create.

The Configuration Progress window is displayed with the status indication of the domain creation process.



9. Click Next when 100% of the activity is complete.  
The End of Configuration window is displayed

Figure A-6 End of Configuration



10. Click Finish. The domain server is created enabling the deployment of multiple Infrastructure applications on a single WebLogic.

---

**Note:** Note down the HTTPS port specified during this process and use the same as servlet port or web server port during OFSAAI Installation.

To enable https configuration on Infrastructure, assign value 1 to "HTTPS\_ENABLE" in OFSAAI\_InstallConfig.xml for silent mode OFSAAI installation.

---

11. Add a java option entry `-DUseSunHttpHandler=true` in `WLS_HOME/bin/"setDomainEnv.sh"` file (Required only if self signed certificate is used).

### Deleting Domain in WebLogic

To delete a domain in WebLogic, follow these steps:

1. Navigate to the following directory:

```
<WebLogic Installation directory>/user_projects/domains/<domain name>/bin
```

2. Execute **stopWebLogic.sh** to stop the WebLogic domain.
3. Delete the WebLogic domain.

### Configuring WebLogic Memory Settings

To configure the WebLogic Memory Settings, follow these steps:

1. Change the memory setting for Java Heap to `-Xms512m -Xmx3072m` in `setDomainEnv.sh` file, which resides in the folder `<DOMAIN_HOME>/bin` and in `CommEnv.sh` file which resides in the folder `common/bin`.
2. Edit this file for customizing memory settings and garbage collector settings depending on the available hardware configuration.

Example 1:

```
if [ "${JAVA_VENDOR}" = "Sun" ] ; then
    WLS_MEM_ARGS_64BIT="-Xms512m -Xmx1024m"
    export WLS_MEM_ARGS_64BIT
    WLS_MEM_ARGS_32BIT="-Xms512m -Xmx1024m"
    export WLS_MEM_ARGS_32BIT
else
    WLS_MEM_ARGS_64BIT="-Xms512m -Xmx1024m"
    export WLS_MEM_ARGS_64BIT
    WLS_MEM_ARGS_32BIT="-Xms512m -Xmx1024m"
    export WLS_MEM_ARGS_32BIT
```

Example 2:

```
JAVA_VM=
MEM_ARGS="-Xms256m -Xmx1024m"
```

### Configuring WebLogic for REST Services Authorization

1. Open the `config.xml` file located in the domain where OFSAA is deployed, that is `<domain_home>/config/config.xml`
2. Add the following in the security-configuration tag:
 

```
<enforce-valid-basic-auth-credentials>>false</enforce-valid-basic-auth-credentials>
```

## Configuring Apache Tomcat Server for Application Deployment

This section is applicable only when the Web application server type is Tomcat.

This section includes the following topics:

- [Tomcat User Administration](#)
- [Configuring Tomcat to use JAVA 64 bit Executables](#)
- [Configuring Servlet Port](#)
- [Configuring SSL Port](#)
- [Configuring Apache Tomcat Memory Settings](#)



- [Configuring Axis API](#)
- [Configuring Tomcat for User Group Authorization and Data Mapping](#)
- [Uninstalling WAR Files in Tomcat](#)

## Tomcat User Administration

The Tomcat administration and manager application does not provide a default login. You are required to edit "\$CATALINA\_HOME/conf/tomcat-users.xml" as instructed below.

This file contains an XML <user> for each individual user, which will display the username and password used by admin to log on to Tomcat, and the role names to which the admin user is associated with. For example, <user name="admin" password="admin" roles="standard,manager" />

1. Add the manager role to any one of the existing username/password combination as shown in the preceding example.
2. Use the same username/password to which the manager role has been assigned to access the Tomcat Application Manager.
3. If the Tomcat server is already running, it requires a re-start after the above configuration is done.

## Configuring Tomcat to use JAVA 64 bit Executables

To configure Tomcat to use JAVA 64 bit, follow these steps:

1. Navigate to the \$CATALINA\_HOME/bin folder.
2. Edit the setclasspath.sh file as follows:
3. Replace the following block of text

```
# Set standard commands for invoking Java.
_RUNJAVA="$JRE_HOME"/bin/java
if [ "$os400" != "true" ]; then
_RUNJDB="$JAVA_HOME"/bin/jdb
```

With:

```
# Set standard commands for invoking Java.
_RUNJAVA="$JAVA_BIN"/java
if [ "$os400" != "true" ]; then
_RUNJDB="$JAVA_BIN"/jdb
```

4. If the Tomcat server is already running, it requires a re-start after the above configuration is done.

---

---

**Note:** In case tomcat is installed under different Unix profile, set JAVA\_BIN environment variable in .profile to include the Java Runtime Environment absolute path.

For example:

```
export JAVA_BIN /usr/java6_64/jre/bin  
  
export JAVA_BIN = /usr/java6_64/jre/bin//sparcv9 for Solaris Sparc
```

---

---

## Configuring Servlet Port

The default servlet port configured for the Tomcat installation is 8080. Ignore this section if you need to use the default port.

If you need to use a different port number, you must first configure the port in the server.xml file in the conf directory of Tomcat Installation directory.

To configure the Servlet Port, follow these steps:

1. Navigate to \$CATALINA\_HOME/conf. Open server.xml and locate the tag:

```
"Define a non-SSL HTTP/1.1 Connector on port 8080 "
```

Against this tag, a parameter is specified 'Connector port = "8080" '. Edit this value to the new port number that was used during the Infrastructure installation process.

2. Save your changes in the server.xml file.

---

---

**Note:** Make a note of the servlet port configured. This information is required during the installation of OFSAA Applications Pack.

---

---

## Configuring SSL Port

If you need to configure and access your OFSAA setup for HTTPS access, ensure that the following connect tag under **Define a SSL HTTP/1/1 Connector on port 8443** in <Tomcat\_installation\_folder>/conf/server.xml file is uncommented for SSL Configuration. (By default, it is commented).

```
<Connector port="8443" protocol="HTTP/1.1" SSLEnabled="true"  
maxThreads="150" scheme="https" secure="true"  
clientAuth="false" sslProtocol="TLS"
```

---

---

**Note:**

- Make a note of the servlet port configured. This information would be required during the installation of OFSAA Applications Pack.
  - To enable https configuration on Infrastructure, assign value 1 to HTTPS\_ENABLE in OFSAAI\_InstallConfig.xml file for Silent mode OFSAAI installation.
- 
-

For more information related to SSL Configuration on Tomcat, see <http://tomcat.apache.org/>.

## Configuring Apache Tomcat Memory Settings

To configure the Apache Tomcat Memory Settings, follow these steps:

1. Locate the `catalina.sh` file that resides in the `<CATALINA_HOME>/bin` folder.
2. Edit this file for customizing the memory settings and garbage collector settings depending on the available hardware configuration.
3. Add the memory setting for Java Heap to `-Xms512m -Xmx1024m`.

For example:

```
if [ -z "$LOGGING_MANAGER" ]; then
    JAVA_OPTS="$JAVA_OPTS -Xms512m -Xmx1024m
    -Djava.util.logging.manager=org.apache.juli.ClassLoaderLogManager"
else
    JAVA_OPTS="$JAVA_OPTS -Xms512m -Xmx1024m $LOGGING_MANAGER"
fi
```

## Configuring Axis API

Copy the `jaxrpc.jar` from the `<OFSSAA Installation Directory>/axis-1_4/webapps/axis/WEB-INF/lib` and place it in the `<Tomcat Installation Directory>/lib` folder and restart the Tomcat Server.

## Configuring Tomcat for User Group Authorization and Data Mapping

Users with system authorization roles can access User Group Authorization. However, to make it available on Tomcat web server, you have to perform the following configuration steps:

1. Navigate to the `$CATALINA_HOME/conf` folder and open `web.xml` file.
2. Enter the following in the `web.xml` file.

```
<init-param>
<param-name>mappedfile</param-name>
<param-value>>false</param-value>
</init-param>
```

3. Save and close the file.

## Uninstalling WAR Files in Tomcat

To uninstall WAR files in tomcat, see [Uninstalling WAR Files in Tomcat](#).



---

---

## Configuring Resource Reference in Web application servers

This section covers the following topics:

- [Configuring Resource Reference in WebSphere Application Server](#)
- [Configuring Resource Reference in WebLogic Application Server](#)
- [Configuring Resource Reference in Tomcat Application Server](#)

### Configuring Resource Reference in WebSphere Application Server

This section is applicable only when the Web application server type is WebSphere.

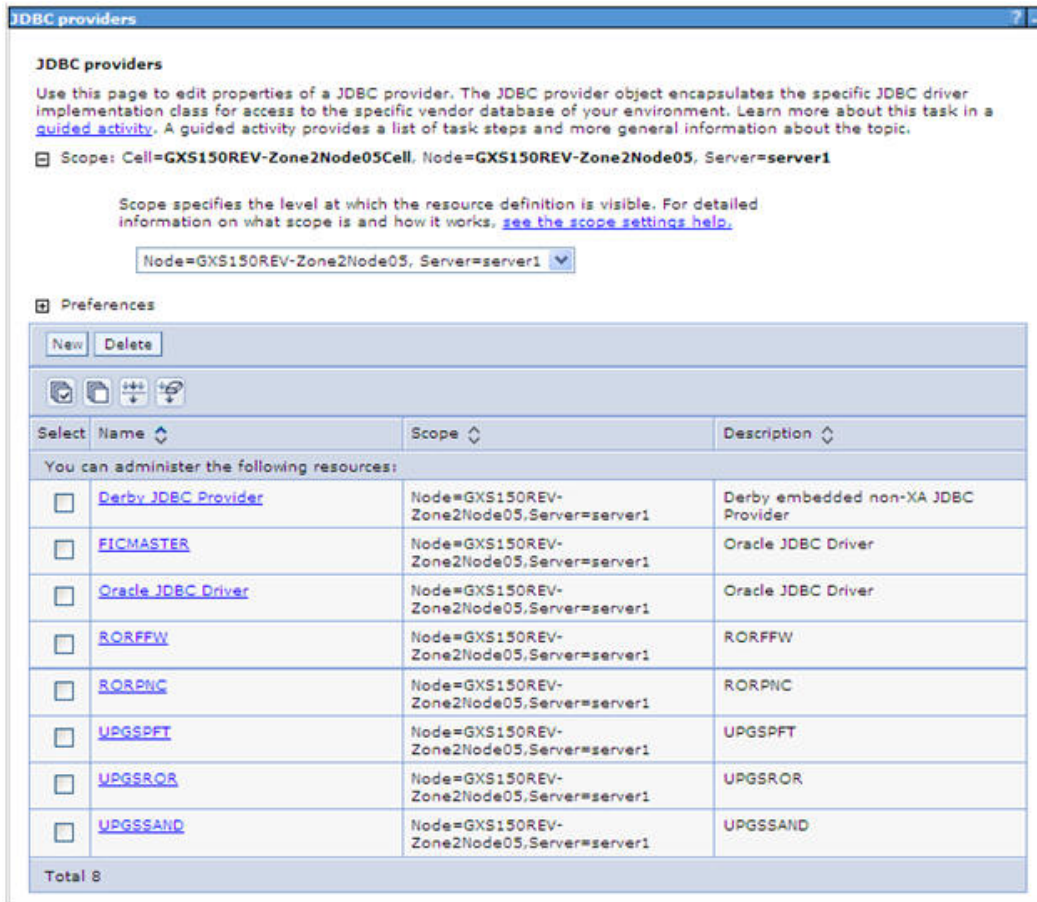
This section covers the following topics:

- [Creating JDBC Provider](#)
- [Creating Data Source](#)
- [Creating J2C Authentication Details](#)
- [Defining JDBC Connection Pooling](#)

#### Creating JDBC Provider

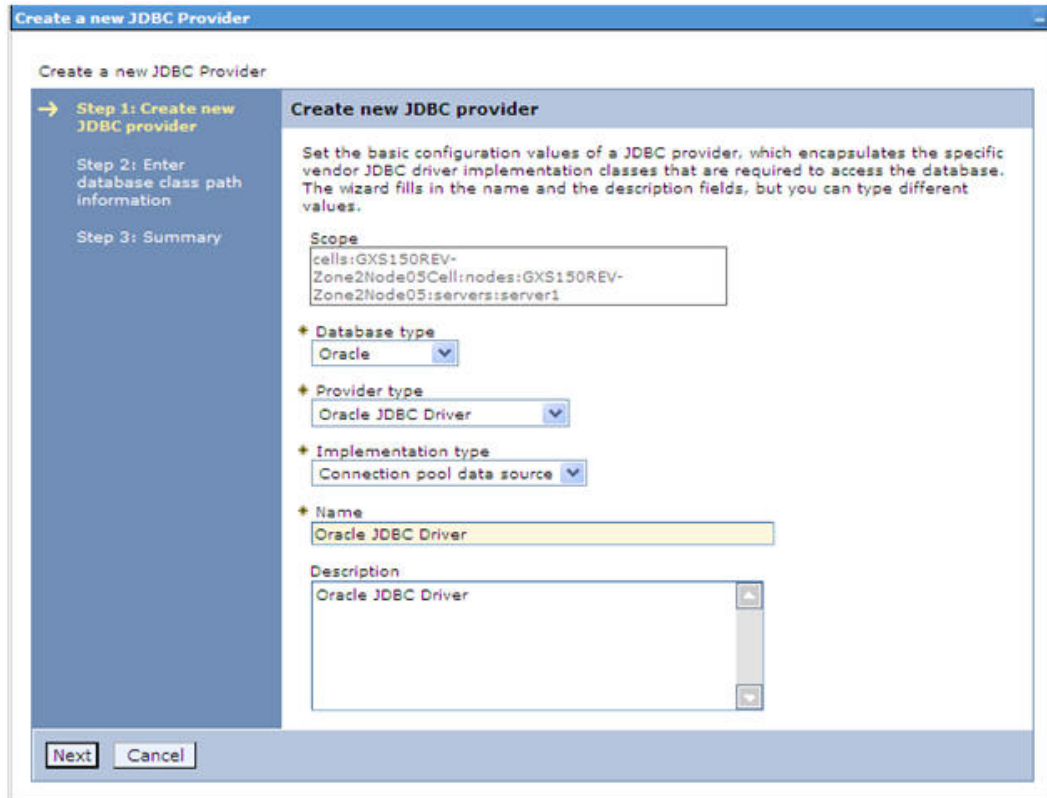
1. Open the WebSphere admin console in the browser window:  
`http://<ipaddress>:<administrative console port>/ibm/console`. (https if SSL is enabled). The *Login* window is displayed.
2. Login with the user id that has admin rights.
3. Expand the **Resources** option in the LHS menu and click **JDBC > JDBC Providers**. The JDBC Providers window is displayed.

Figure 7-6 JDBC Providers



4. Select the **Scope** from the drop-down list. Scope specifies the level at which the resource definition is visible.
5. Click **New** to add new JDBC Provider under the *Preferences* section. The Create new JDBC provider window is displayed.

Figure 7-7 Create a new JDBC Provider



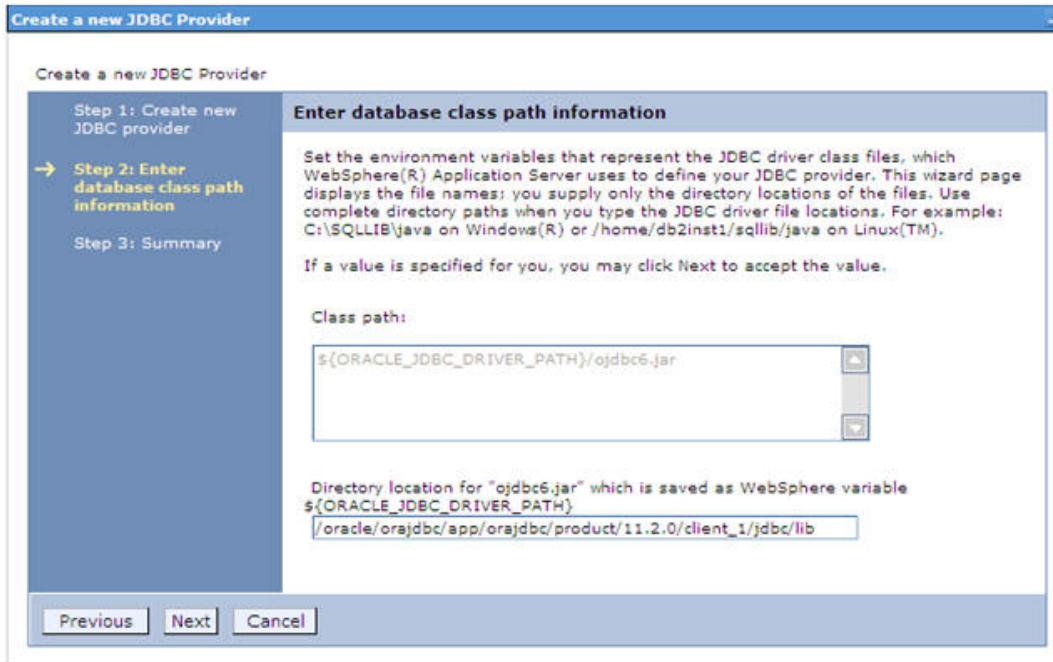
6. Enter the following details:

Table B-1 Fields and their description

Field	Description
Database Type	Oracle
Provider Type	Oracle JDBC Driver
Implementation Type	Connection pool data source
Name	The required display name for the resource
Description	The optional description for the resource

7. Click Next.

**Figure 7–8 Enter database class path information**



8. Specify the directory location for "ojdbc<version>.jar" file. Ensure that you do not use the trailing slash file separators.

The Oracle JDBC driver can be downloaded from the following Oracle Download site:

- [Oracle Database 11g Release 2 \(11.2.0.4\) JDBC Drivers](#)
- [Oracle Database 12c Release 1 \(12.1.0.1\) JDBC Drivers](#)

Once downloaded, you need to copy the file in the required folder on the server.

---

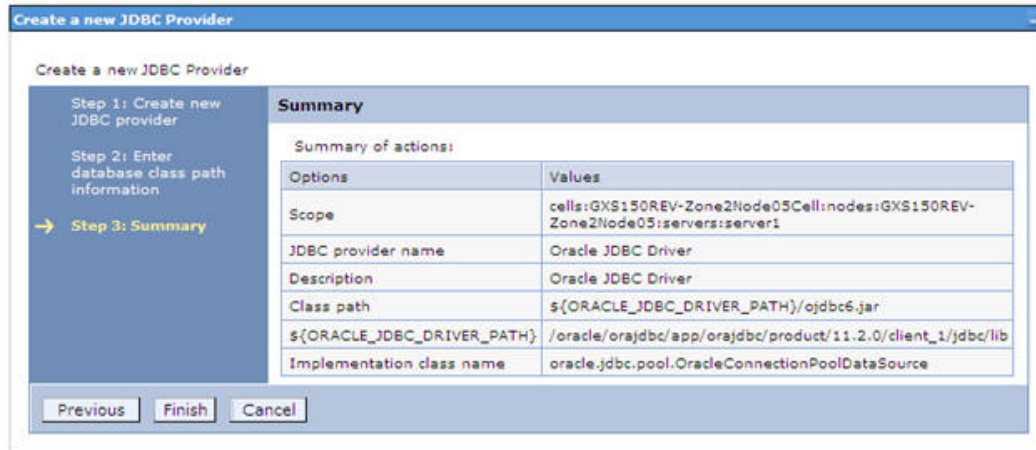
**Note:** See [Appendix O](#) for identifying the correct ojdbc<version>.jar version to be copied.

---

9. Click **Next**. The Summary window is displayed.



Figure 7-9 Summary



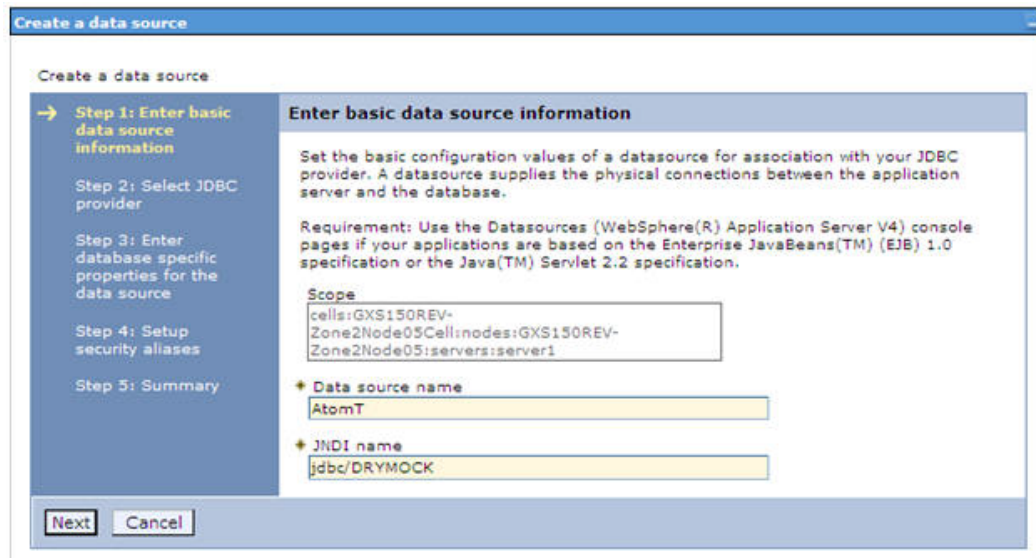
10. Verify the details and click **Finish** to create the JDBC Provider.
11. The options to **Save** and **Review** are displayed. Click **Save**.

## Creating Data Source

The steps given below are applicable for both config and atomic data source creation.

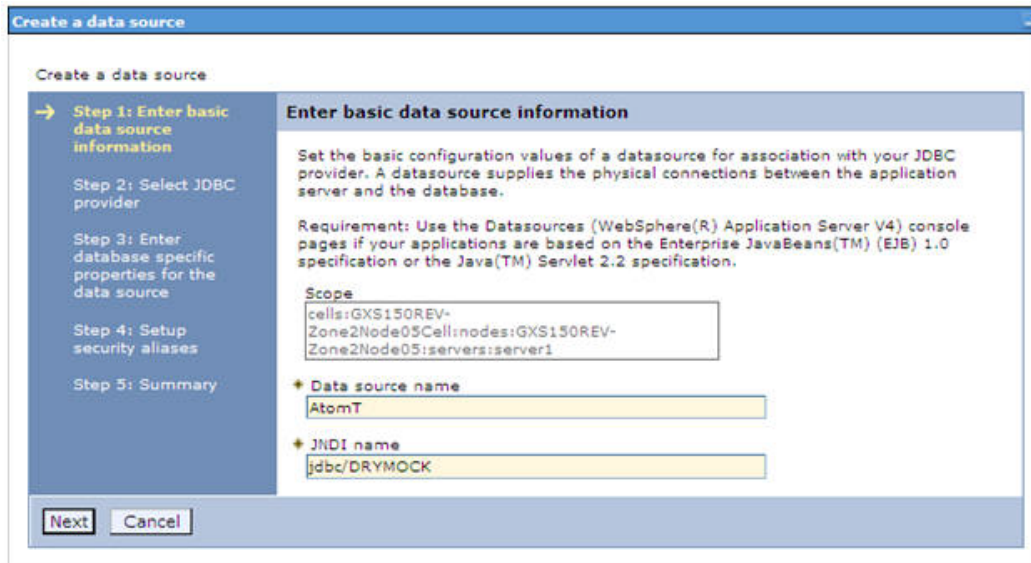
1. Open this URL in the browser window: `http://<ipaddress>:<administrative console port>/ibm/console`. (https if SSL is enabled). The **Login** window is displayed.
2. Login with the user id that has admin rights.
3. Expand the **Resources** option in the LHS menu and click **JDBC > Data sources** option. The Data sources page is displayed.

Figure B-1 Data Sources



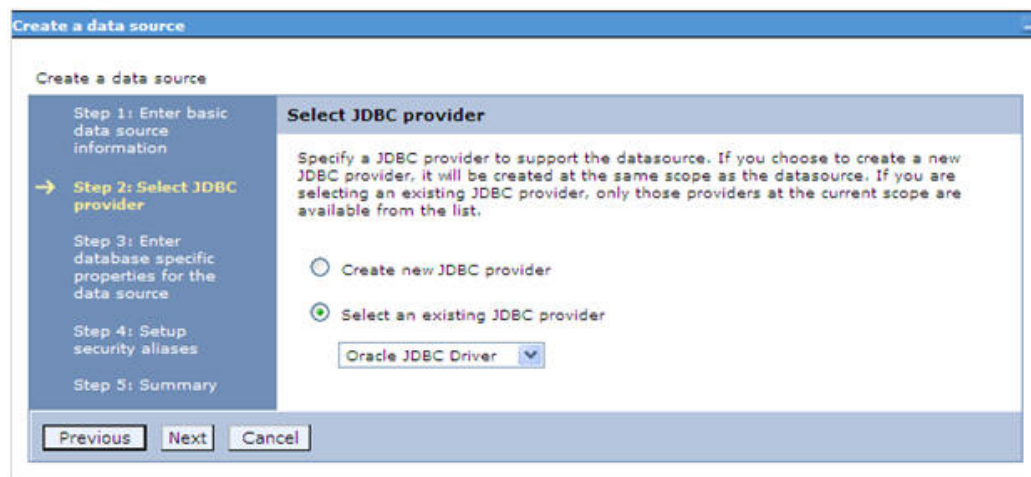
4. Select the **Scope** from the drop down list. Scope specifies the level at which the resource definition is visible.
5. Click **New**. The Create a Data Source window is displayed.

**Figure B–2 Create Data Source**



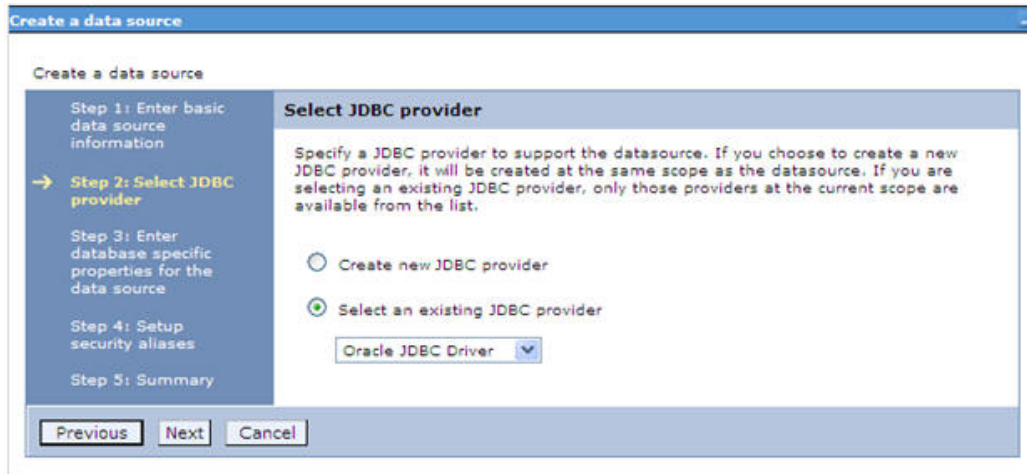
6. Specify the **Data Source name** and **JNDI name** for the new "Data Source".  
The **JNDI** and **Data Source** name are case sensitive and ensure that JNDI name is same as the "Information Domain" name.
7. Click **Next**. The Select JDBC provider window is displayed.

**Figure B–3 Select JDBC provider**



8. Select the option **Select an Existing JDBC Provider** and select the required JDBC provider from the drop-down list. Click **Next**.

Figure B-4 Enter database specific properties



9. Specify the database connection URL.

For example: `jdbc:oracle:thin:@<DB_SERVER_IP>:<DB_SERVER_PORT>:<SID>`

10. Select **Data Store Helper Class Name** from the drop-down list and ensure that the check box **Use this data source in container managed persistence (CMP)** is selected.

---

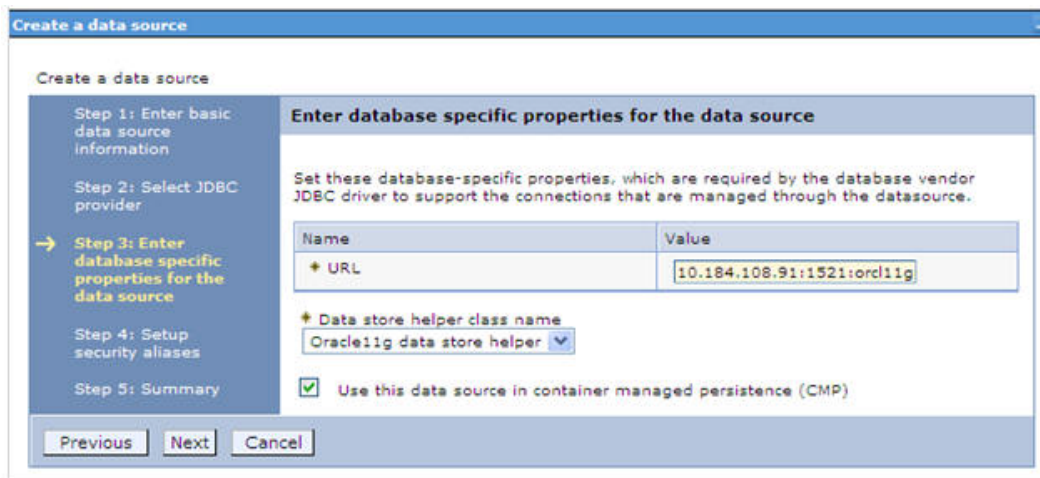
**Note:** For RAC configuration, provide the RAC url specified during installation.

---

Example: `jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=TCP)(HOST=10.11.12.13)(port=1521))(ADDRESS=(PROTOCOL=TCP)(HOST=10.11.12.14)(PORT=1521))(LOAD_BALANCE=no)(FAILOVER=yes))(CONNECT_DATA=(SERVICE_NAME=pqadb)))`

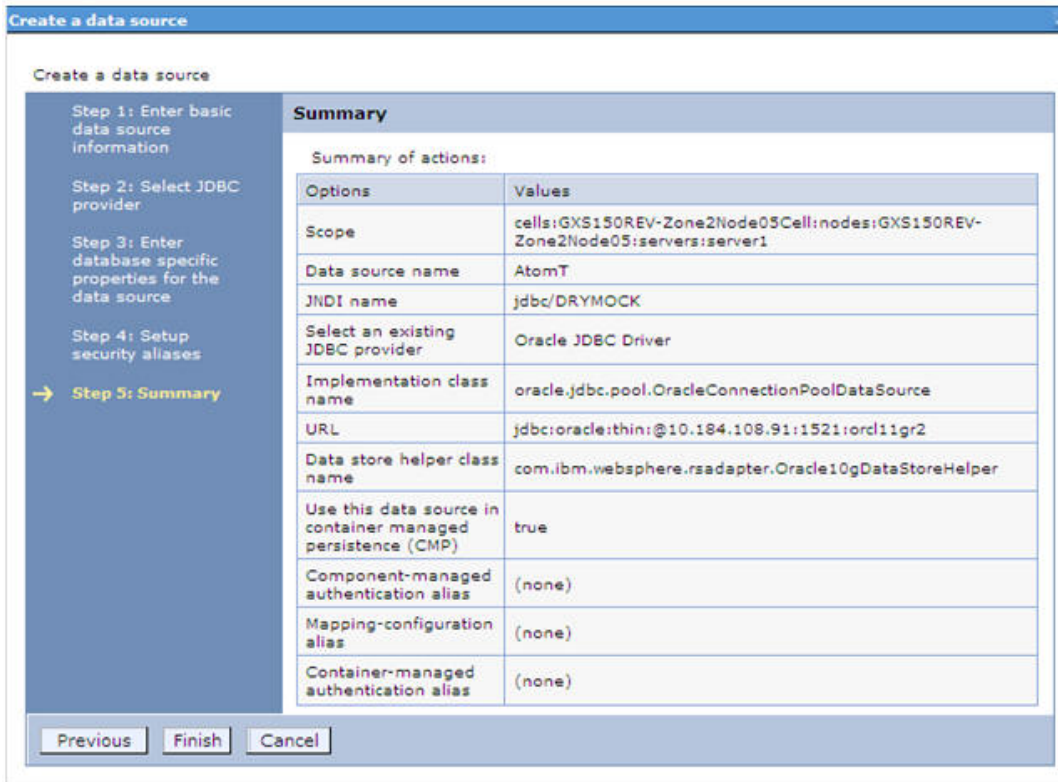
11. Click Next.

Figure B-5 Enter Database specific properties



12. Map the J2C authentication alias, if already created. If not, you can create a new J2C authentication alias by accessing the link given (**Global J2C authentication alias**) or you can continue with the data source creation by clicking **Next** and then **Finish**.

**Figure B-6 Summary**



You can also create and map J2C authentication alias after creating the data source.

13. You must create another Data source by following the above procedure with jdbc/FICMASTER as JNDI name pointing to the "configuration schema" of Infrastructure.

## Creating J2C Authentication Details

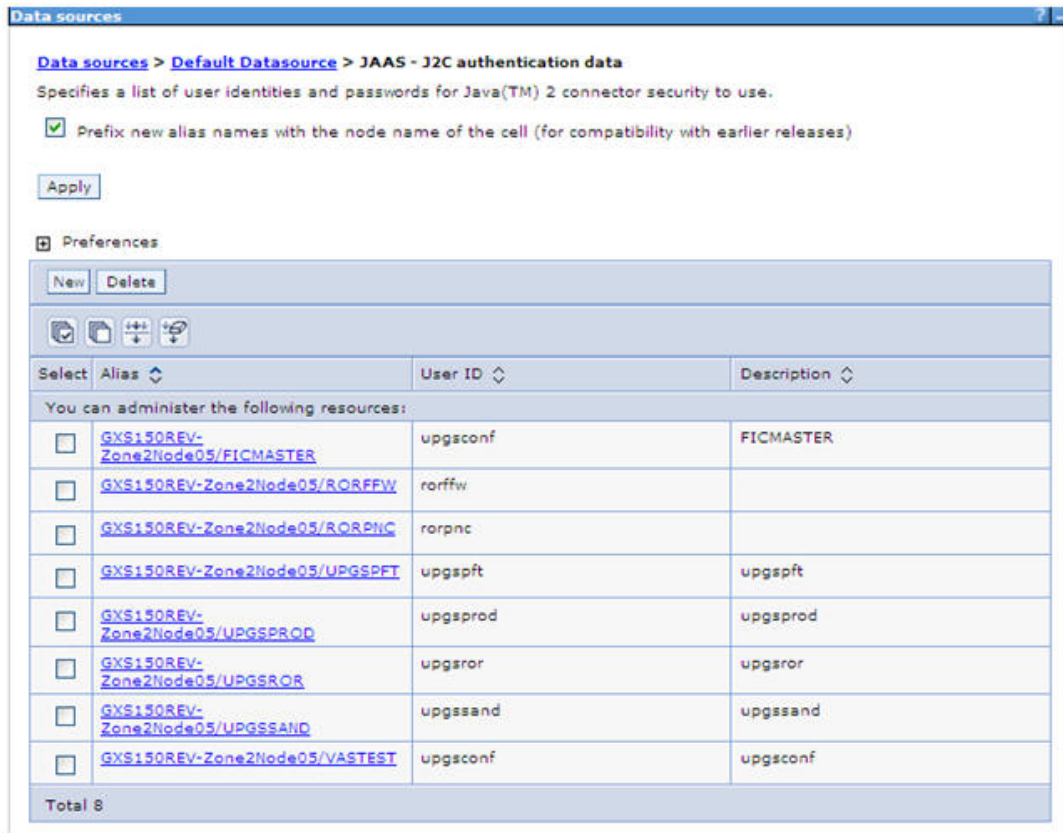
The steps given below are applicable for creating both config and atomic J2C Authentication.

To create J2C Authentication details, follow these steps:

1. Select the newly created Data Source and click **JAAS - J2C authentication data** link under **Related Items**.

*JAAS- J2C authentication data*

Figure B-7 JAAS- J2C authentication data



2. Click **New** under the Preferences section.

Figure 7-10 JAAS- J2C authentication data- New



3. Enter the **Alias**, **User ID**, **Password**, and **Description**. Ensure the following:

- User ID is the Oracle user ID created for the respective Config and Atomic Schema for the "Information Domain".

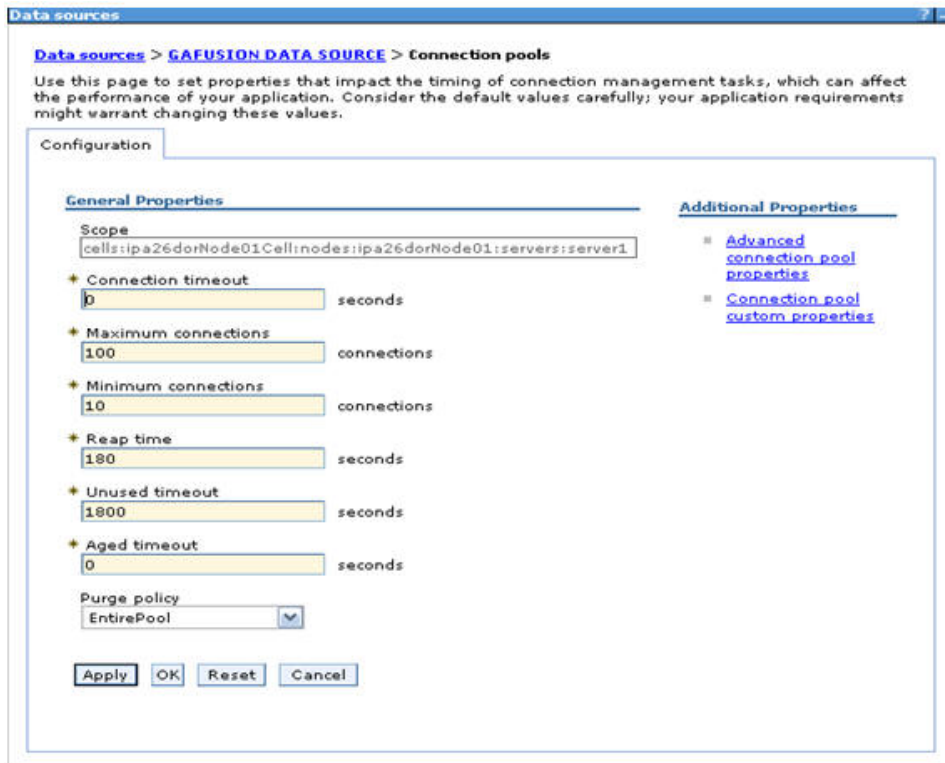
- Specify the Config database user ID and password information for the jdbc/FICMASTER data source, and specify the Atomic database user ID and password information for the Atomic schema data source that you created earlier.
4. Click **Apply** and save the details.

## Defining JDBC Connection Pooling

To define the JDBC connection pooling ensure that you have created JDBC Provider and Data source to access the data from the database.

1. Expand the **Resources** option in the LHS menu and click **JDBC > Data sources option**. The Data sources page is displayed.
2. Click the newly created Data Source \$DATA\_SOURCE\$ and navigate to the path Data sources>\$DATA\_SOURCE\$>Connection pools.

**Figure B–8 Connection pools**



3. Set the values for **Connection timeout** to 0 seconds, **Maximum connections** to 100 connections, and **Minimum connections** to 10 connections as shown in the above figure. You can also define **Reap Time**, **Unused Timeout**, and **Aged Timeout** as required.

## Configuring Resource Reference in WebLogic Application Server

This section is applicable only when the Web application server type is WebLogic. This section includes the following topics:

- [Creating Data Source](#)
- [Creating GridLink Data Source](#)
- [Configuring Multi Data Sources](#)
- [Configuring Advanced Settings for Data Source](#)
- [Defining JDBC Connection Pooling](#)

In WebLogic, you can create "Data Source" in the following ways:

- "For a Non RAC Database instance, Generic Data Source has to be created. See [Create Data Source](#).
- "For a RAC Database instance, Gridlink Data Source has to be created. See [Create GridLink Data Source](#).
- "When Load Balancing/Fail over is required, Multi Data Source has to be created. See [Configure Multi Data Sources](#).

## Creating Data Source

The steps given below are applicable for both config and atomic data source creation.

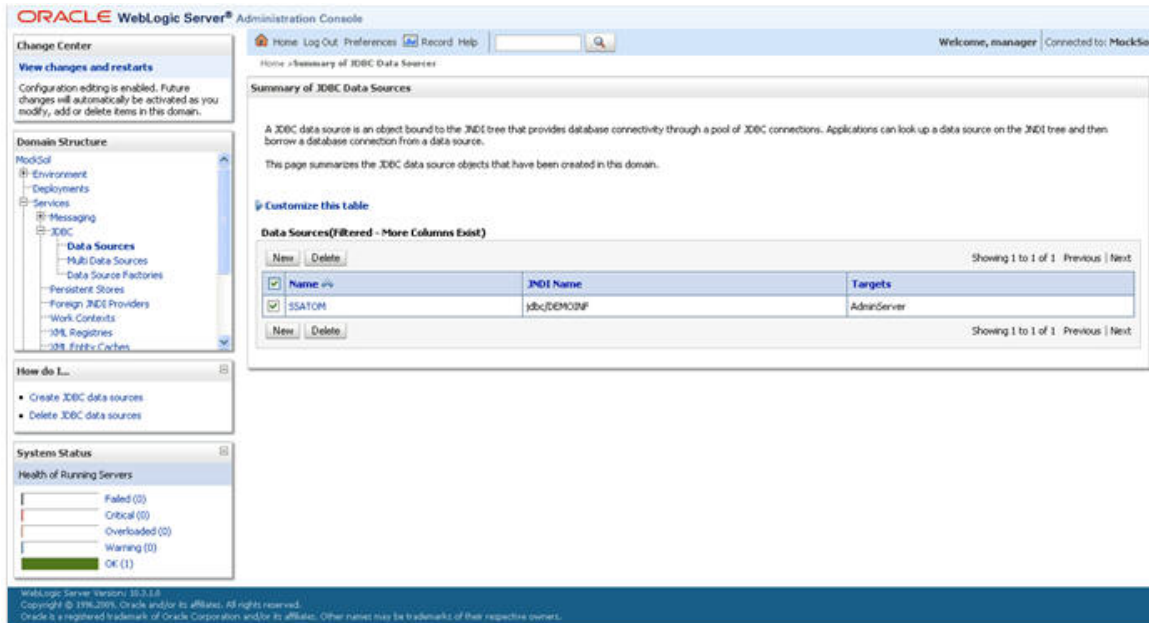
1. Open the following URL in the browser window:  
<http://<ipaddress>:<administrative console port>/console>. (https if SSL is enabled). The Welcome window is displayed.
2. Login with the Administrator **Username** and **Password**.

**Figure B-9** Welcome



3. From the LHS menu (Domain Structure), click **Services > Data Sources**. The Summary of JDBC Data Sources window is displayed.

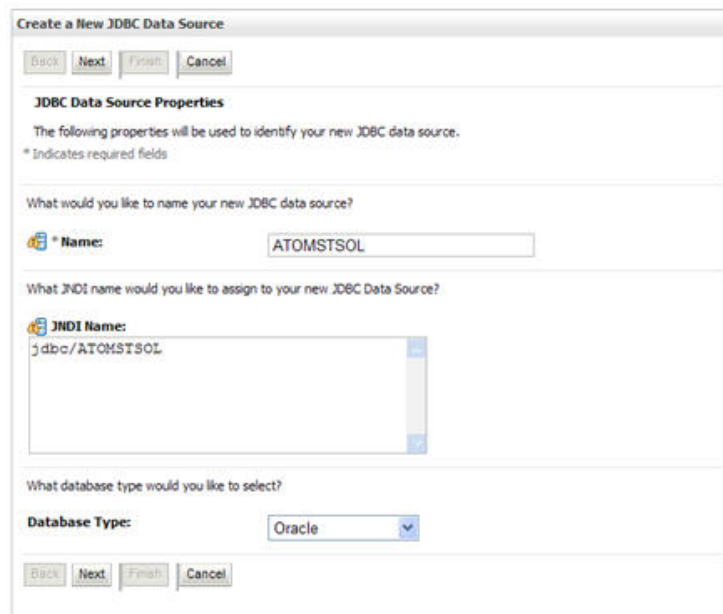
Figure B-10 Summary of JDBC Data Sources



4. Click **New** and select **Generic Data Source** option. The **Create a New JDBC Data Source** window is displayed.

You can also select **GridLink Data Source** or **Multi Data Source** while creating a Data Source. For more information, see [Creating Data Source](#) or [Configuring Multi Data Sources](#).

Figure 7-11 Create a New JDBC Data Source





5. Enter JDBC data source **Name**, **JNDI Name**, and select the **Database Type** from the drop-down list. Click **Next**.

Ensure the following:

- The JNDI Name field should be in the format "jdbc/informationdomain"
- Same steps needs to be followed to create a mandatory data source pointing to the "configuration schema" of infrastructure with `jdbc/FICMASTER` as JNDI name.
- JNDI Name is the same as mentioned in `web.xml` file of OFSAAI Application.
- Required "Database Type" and "Database Driver" should be selected.

**Figure B–11 JDBC Data Source Properties**

The screenshot shows a dialog box titled "Create a New JDBC Multi Data Source". At the top, there are four buttons: "Back", "Next", "Finish", and "Cancel". Below the buttons is the section "Select Data Source Type" with the instruction: "Please select type (XA or Non-XA) of data source you would like to add to your new JDBC Multi Data Source." There are two radio button options: "XA Driver" (which is unselected) and "Non-XA Driver" (which is selected). At the bottom of the dialog, there are again four buttons: "Back", "Next", "Finish", and "Cancel".

6. Select the **Database Driver** from the drop-down list. You need to select the Database Driver depending on database setup, that is, with or without RAC. Click **Next**.

**Figure B–12 Transaction Options**

The screenshot shows a dialog box titled "Create a New JDBC Data Source". At the top, there are four buttons: "Back", "Next", "Finish", and "Cancel". Below the buttons is the section "Transaction Options" with the instruction: "You have selected non-XA JDBC driver to create database connection in your new data source." The question is: "Does this data source support global transactions? If yes, please choose the transaction protocol for this data source." There are four options: "Supports Global Transactions" (checked), "Logging Last Resource" (unselected), "Emulate Two-Phase Commit" (unselected), and "One-Phase Commit" (selected). Below the options, there are four buttons: "Back", "Next", "Finish", and "Cancel".

7. Select the **Supports Global Transactions** check box and the **One-Phase Commit** option.

8. Click **Next**. The Connection Properties window is displayed.

**Figure B–13** Connection Properties

The screenshot shows a window titled "Create a New JDBC Data Source" with a "Connection Properties" tab selected. The window contains several input fields for configuring a database connection. At the top, there are buttons for "Back", "Next", "Finish", and "Cancel". The "Next" button is highlighted. Below the title bar, the text "Define Connection Properties." is displayed. The form includes the following fields:

- Database Name:** fsgbu
- Host Name:** 10.184.74.80
- Port:** 1521
- Database User Name:** ssatom
- Password:** (masked with dots)
- Confirm Password:** (masked with dots)

At the bottom of the window, there are buttons for "Back", "Next", "Finish", and "Cancel".

9. Enter the required details such as the Database Name, Host Name, Port, Oracle User Name, and Password.
10. Click **Next**. The Test Database Connection window is displayed.

Figure B-14 Test Database Connection

Create a New JDBC Data Source

Test Configuration Back Next Finish Cancel

**Test Database Connection**

Test the database availability and the connection properties you provided.

What is the full package name of JDBC driver class used to create database connections in the connection pool?  
(Note that this driver class must be in the classpath of any server to which it is deployed.)

**Driver Class Name:** oracle.jdbc.OracleDriver

What is the URL of the database to connect to? The format of the URL varies by JDBC driver.

**URL:** jdbc:oracle:thin:@10.184.1.10:1521:orcl

What database account user name do you want to use to create database connections?

**Database User Name:** sstatom

What is the database account password to use to create database connections?  
(Note: for secure password management, enter the password in the Password field instead of the Properties field below)

**Password:** .....

**Confirm Password:** .....

What are the properties to pass to the JDBC driver when creating database connections?

**Properties:**  
user=sstatom

The set of driver properties whose values are derived at runtime from the named system property.

**System Properties:**

What table name or SQL statement would you like to use to test database connections?

**Test Table Name:**  
SQL SELECT 1 FROM DUAL

Test Configuration Back Next Finish Cancel

11. Verify the details and click **Test Configuration** and test the configuration settings. A confirmation message is displayed stating "Connection test succeeded."
12. Click **Finish**. The created "Data Source" is displayed in the list of Data Sources.

---

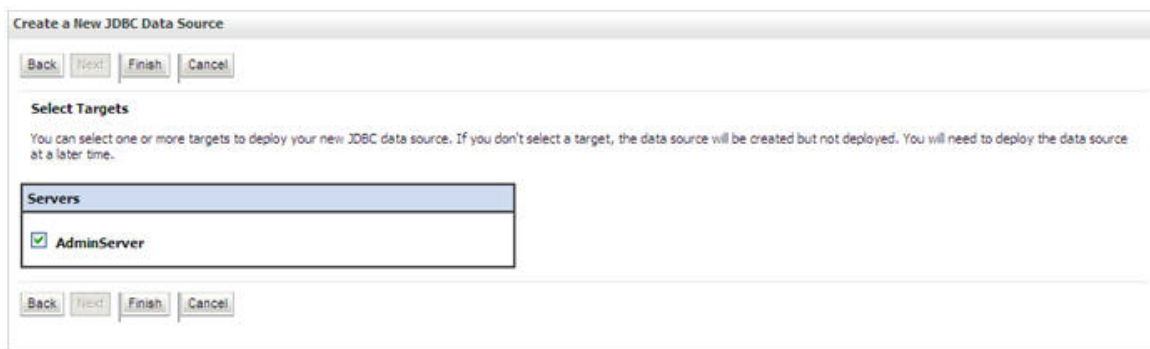
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**Note:**

- "User ID" is the Oracle user ID that is created for the respective "Information Domain".
  - "User ID" to be specified for data source with "FICMASTER" as "JNDI" name should be the Oracle user ID created for the "configuration schema".
- 
- 

13. Select the new Data Source and click the Targets tab.

**Figure B–15 Select Targets**



14. Select the **AdminServer** option and click **Finish**.

## Creating GridLink Data Source

If you have selected the option, **New > GridLink Data Source** while creating the "Data Source", you can directly specify the JDBC URL as indicated.

**Figure 7-12** Create a New JDBC GridLinkData Source

The screenshot shows the 'Create a New JDBC GridLink Data Source' wizard at the 'Connection Properties' step. The title bar reads 'Create a New JDBC GridLink Data Source'. At the top, there are navigation buttons: 'Back', 'Next', 'Finish', and 'Cancel'. Below the title, the section is titled 'Connection Properties' with the instruction 'Define Connection Properties.' The main content area contains the following fields and instructions:

- Instruction: 'Enter Complete JDBC URL for GridLink database.'
- Field: 'Complete JDBC URL:' with an empty text input box.
- Instruction: 'What database account user name do you want to use to create database connections?'
- Field: 'Database User Name:' with an empty text input box.
- Instruction: 'What is the database account password to use to create database connections?'
- Field: 'Password:' with an empty text input box.
- Field: 'Confirm Password:' with an empty text input box.

At the bottom of the form, there are navigation buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

1. Enter Data Source Name, and JNDI Name.

Ensure that the "JNDI Name" field is specified in the format "jdbc/infodomainname" and the XA Driver check box is not selected. Click Next.

**Figure 7-13** JDBC GridLinkData Source- Connection Properties

The screenshot shows the 'Create a New JDBC GridLink Data Source' wizard at the 'JDBC GridLink Data Source Properties' step. The title bar reads 'Create a New JDBC GridLink Data Source'. At the top, there are navigation buttons: 'Back', 'Next', 'Finish', and 'Cancel'. Below the title, the section is titled 'JDBC GridLink Data Source Properties' with the instruction 'The following properties will be used to identify your new JDBC GridLink data source.' and a note '\* Indicates required fields'. The main content area contains the following fields and instructions:

- Instruction: 'What would you like to name your new JDBC GridLink data source?'
- Field: '\* Name:' with a text input box containing 'xyz'.
- Instruction: 'What JNDI name would you like to assign to your new JDBC GridLink data source?'
- Field: 'JNDI Name:' with a text input box containing 'jdbc/xyz'.
- Instruction: 'What database type would you like to select?'
- Field: 'Database Type:' with a dropdown menu showing 'Oracle'.
- Instruction: 'Is this XA driver?'
- Field: 'XA Driver' with an unchecked checkbox.

At the bottom of the form, there are navigation buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

- Specify **Complete JDBC URL, Database User Name, and Password**. Click **Finish**. The created "Data Source" is displayed in the list of Data Sources.

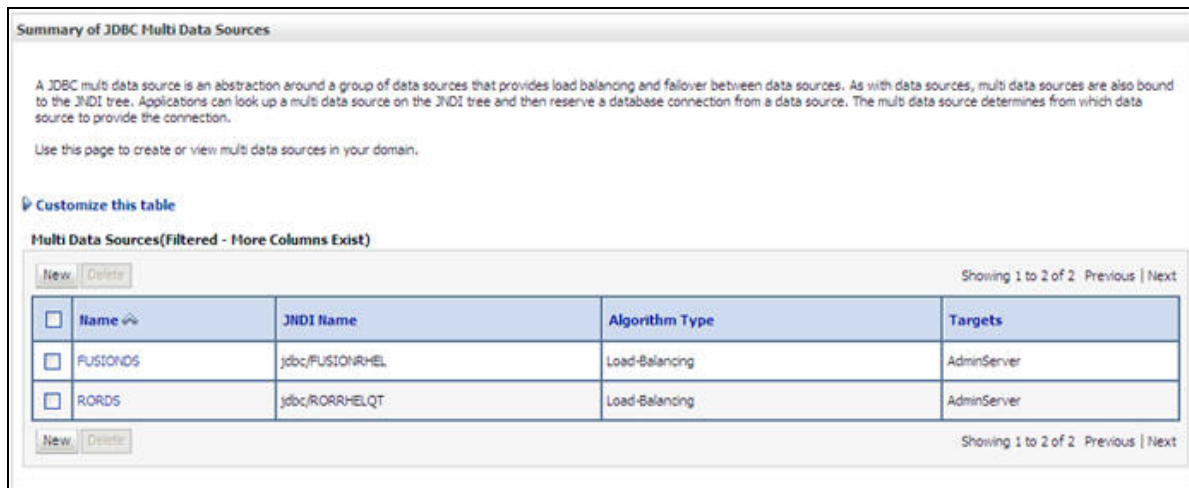
## Configuring Multi Data Sources

A JDBC multi data source is an abstraction around a group of data sources that provides load balancing and failover between data sources. As with data sources, multi data sources are also bound to the JNDI tree. Applications can look up a multi data source on the JNDI tree and then reserve a database connection from a data source. The multi data source determines from which data source to provide the connection.

When the database used is **Oracle RAC (Real Application Clusters)** which allows Oracle Database to run across a set of clustered servers, then group of data sources can be created for instances running on a set of clustered servers and a JDBC multi data source can be created so that applications can look up a multi data source on the JNDI tree to reserve database connection. If a clustered server fails, Oracle continues running on the remaining servers.

- Open WebLogic Admin Console in the browser window:  
<http://<ipaddress>:<administrative console port>/console>. (https if SSL is enabled). The **Login** window is displayed.
- Login with the "User ID" that has admin rights.
- In the LHS menu (Domain Structure), select **Services > JDBC > Multi Data Sources**. The Summary of JDBC Multi Data Sources window is displayed.

**Figure 7–14 Summary of JDBC Multi Data Sources**



- Click **New**. The New JDBC Multi Data Source screen is displayed.

**Note:** Ensure that the Data Sources which needs to be added to new JDBC Multi Data Source has been created.

Figure 7–15 Configure the Multi Data Source

The screenshot shows a wizard window titled "Create a New JDBC Multi Data Source". At the top, there are navigation buttons: "Back", "Next", "Finish", and "Cancel". The main section is titled "Configure the Multi Data Source" and contains the following text: "The following properties will be used to identify your new JDBC multi data source." Below this, it asks "What would you like to name your new JDBC multi data source?". The "Name:" field contains "JDBC Multi Data Source-0". The next question is "What JNDI name would you like to assign to your new JDBC multi data source?". The "JNDI Name:" field contains "jdbc/infodomainname". The final question is "What algorithm type for this JDBC Multi Data Source would you like to select?". The "Algorithm Type:" dropdown menu is set to "Load-Balancing". At the bottom, there are navigation buttons: "Back", "Next", "Finish", and "Cancel".

5. Enter the JDBC Source Name, JNDI name, and select the **Algorithm Type** from the drop-down list. Click **Next**.

---

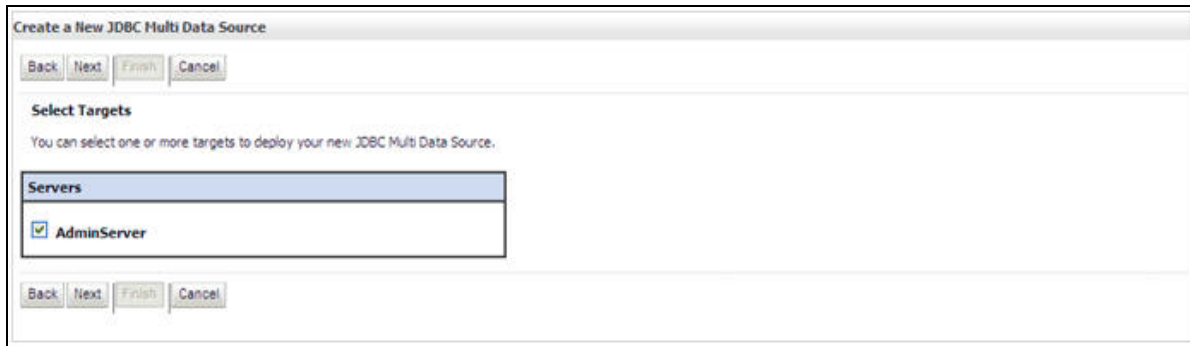


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**Note:**

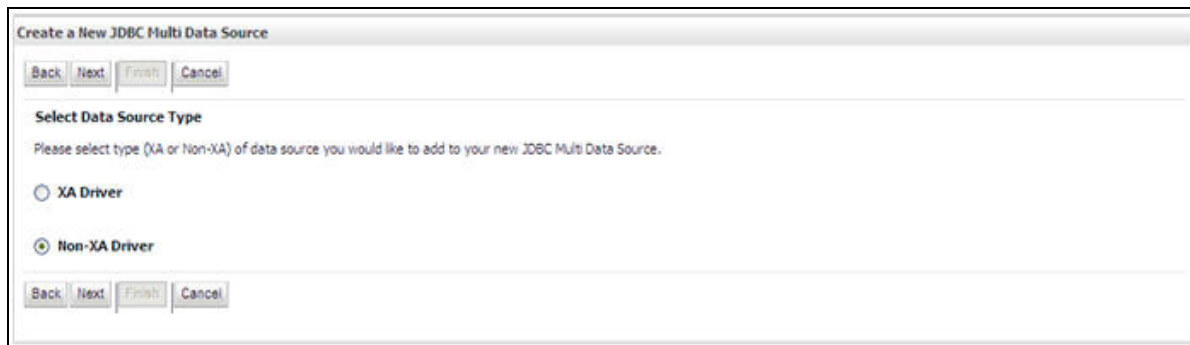
- The JNDI Name has to be specified in the format `jdbc/infodomainname`.
  - JNDI Name of the Data Sources that will be added to new JDBC Multi data source should be different from the JNDI name specified during Multi Data Source.
  - Same steps needs to be followed to create a mandatory data source pointing to the "configuration schema" of infrastructure with `jdbc/FICMASTER` as JNDI name for Data Source.
  - JNDI Name provided in multi data source should be the same name that will be mentioned in the `web.xml` file of OFSAAI Application.
  - You can select the **Algorithm Type** as **Load-Balancing**.
- 
-

**Figure 7–16 Select Targets**



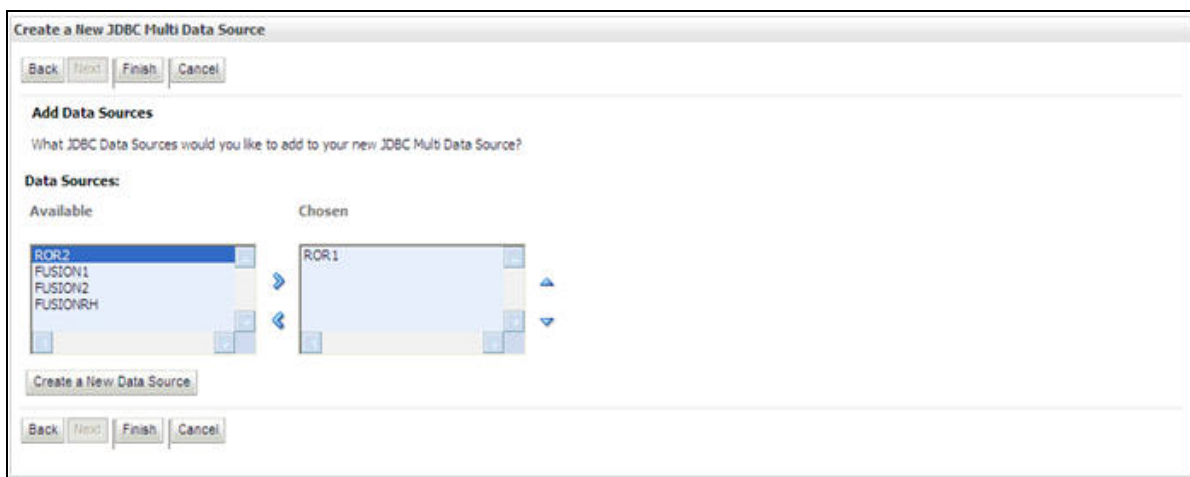
6. Select the **AdminServer** check box and click **Next**.

**Figure 7–17 Select Data Source Type**



7. Select the type of data source which will be added to new JDBC Multi Data Source. Click **Next**.

**Figure 7–18 Add Data Sources**



8. Map the required Data Source from the Available Data Sources. Click **Finish**.  
The New JDBC Multi Data Source is created with added data sources.



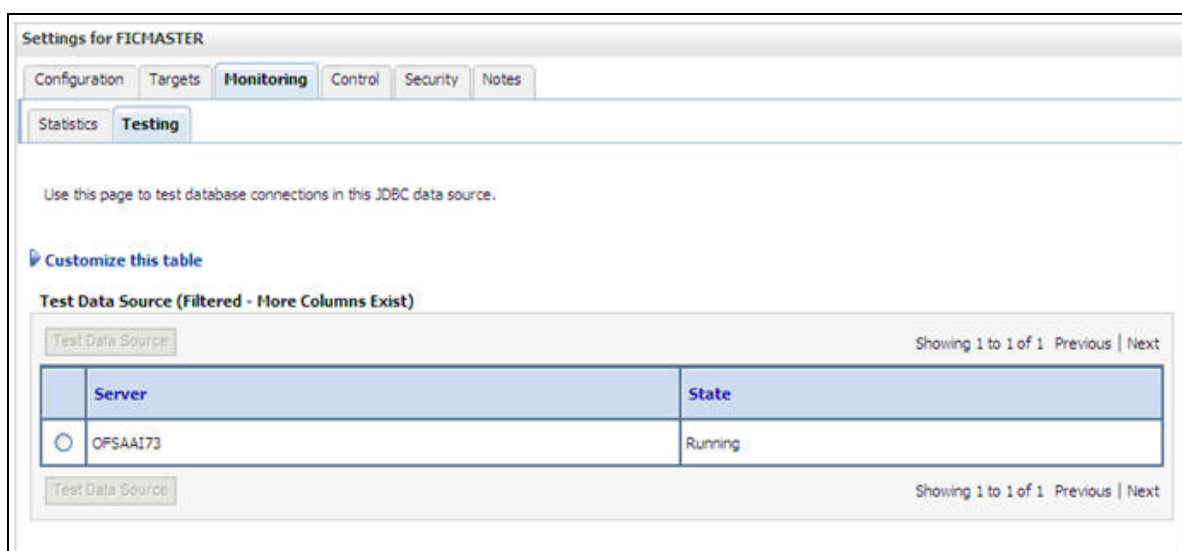
## Configuring Advanced Settings for Data Source

Perform the following steps for advanced settings for Data Source:

1. Click the new Data Source from the Summary of JDBC Data Sources window. The Settings for <Data Source Name> window is displayed.
2. Select the **Connection Pooling** tab given under Configuration.
3. Go to the **Advanced** option at the bottom of the page, and check the **Test Connection of Reserve** check box (Enables WebLogic Server to test a connection before giving it to a client).

To verify if the data source is valid, select "Data Source name". For example, FICMASTER.

**Figure 7–19 Settings for <Data Source Name>**



4. Select the server and click **Test Data Source**.  
A message is displayed indicating that the test was successful.
5. Once the "Data Source" is created successfully, the following messages are displayed:
  - All changes have been activated. No restart is necessary.
  - Settings updated successfully.

If not, follow the steps given above to recreate the data source.

## Defining JDBC Connection Pooling

To define the JDBC connection pooling, ensure that you have created JDBC Provider and Data source to access the data from the database.

1. Click the newly created Data Source \$DATA\_SOURCE\$ and navigate to the path *Home >Summary of Services: JDBC >Summary of JDBC Data Sources >JDBC Data Source-<INFODDOM\_NAME>*
2. Set the values for **Initial Capacity** to 10, **Maximum Capacity** to 100, **Capacity Increment** by 1, **Statement Cache Type** to LRU, and **Statement Cache Size** to 10.

3. Click **Save**.

## Configuring Resource Reference in Tomcat Application Server

This section is applicable only when the Web application server type is Tomcat.

This section covers the following topics:

- [Creating Data Source](#)
- [Defining JDBC Connection Pooling](#)
- [Configuring Class Loader for Apache Tomcat](#)

Copy the Oracle JDBC driver file, "ojdbc<version>.jar" from <Oracle Home>/jdbc/lib and place it in <Tomcat Home>/lib.

---

---

**Note:** See [Appendix O](#) for identifying the correct ojdbc<version>.jar version to be copied.

---

---

### Creating Data Source

To create "data source" for Infrastructure application, navigate to <Tomcat Home>/conf and edit the following block of text by replacing the actual values in server.xml.

---

---

**Note:** The User-IDs for configuration/ atomic schemas have the prefix of setupinfo depending on the value set for PREFIX\_SCHEMA\_NAME in <<APP Pack>>\_SCHEMA\_IN.XML file of Schema Creator Utility.

For example: if the value set for PREFIX\_SCHEMA\_NAME is DEV and the schema name was mentioned as ofsaconf, then the actual schema created in the database would be DEV\_ofsaconf.

---

---

```
<Context path ="/<context name>" docBase="<Tomcat Installation
Directory>/webapps/<context name>" debug="0" reloadable="true"
crossContext="true">
<Resource auth="Container"
    name="jdbc/FICMASTER"
    type="javax.sql.DataSource"
    driverClassName="oracle.jdbc.driver.OracleDriver"
    username="<user id for the configuration schema>"
    password="<password for the above user id>"
    url="jdbc:oracle:thin:@<DB engine IP address>:<DB Port>:<SID>"
    maxActive="100"
    maxIdle="30"
    maxWait="10000"/>
</Resource auth="Container"
```

```

    name="jdbc/< INFORMATION DOMAIN NAME >"
type="javax.sql.DataSource"
    driverClassName="oracle.jdbc.driver.OracleDriver"
    username="<user id for the atomic schema>"
    password="<password for the above user id>"
    url="jdbc:oracle:thin:@<DB engine IP address>:<DB Port>:<SID>"
    maxActive="100"
    maxIdle="30"
    maxWait="10000"/>
</Context>

```

**Note:**

- The <Resource> tag must be repeated for each Information Domain created.
- After the above configuration, the "WAR" file has to be created and deployed in Tomcat.

## Defining JDBC Connection Pooling

To define the JDBC connection pooling, do the following:

1. Copy \$ORACLE\_HOME/jdbc/lib/ojdbc<version>.jar to the path \$TOMCAT\_DIRECTORY/lib/.

**Note:** See [Appendix O](#) for identifying the correct ojdbc<version>.jar version to be copied.

2. Edit the server.xml present under the path \$TOMCAT\_DIRECTORY/conf/ with the below changes, which is required for connection pooling.

```

<Context path="/" $CONTEXTNAME$ " docBase=" $APP_DEPLOYED_PATH$ " debug="0"
reloadable="true" crossContext="true">

```

```

    <Resource auth="Container"
    name="jdbc/ $INFODOM_NAME$"
    type="javax.sql.DataSource"
    driverClassName="oracle.jdbc.driver.OracleDriver"
    username=" $ATOMICSCHEMA_USERNAME$"
    password=" $ATOMICSCHEMA_PASSWORD$"
    url=" $JDBC_CONNECTION_URL"
    maxActive="100"
    maxIdle="30"
    maxWait="10000"
    removeAbandoned="true" removeAbandonedTimeout="60"

```

```
logAbandoned="true" />  
</Context>
```

Note the following:

---

---

**Note:**

- `$APP_DEPLOYED_PATH$` should be replaced by OFSAAI application deployed path.
  - `$INFODOM_NAME$` should be replaced by Infodom Name.
  - `$ATOMICSCHEMA_USERNAME$` should be replaced by Atomic schema database user name.
  - `$ATOMICSCHEMA_PASSWORD$` should be replaced by Atomic schema database password.
  - `$JDBC_CONNECTION_URL` should be replaced by JDBC connection string `jdbc:Oracle:thin:<IP>:<PORT>:<SID>`. For example, `jdbc:oracle:thin 10.80.50.53:1521:soluint`
  - The User-IDs for configuration/ atomic schemas have the prefix of `setupinfo` depending on the value set for `PREFIX_SCHEMA_NAME` in `<<APP Pack>>_SCHEMA_IN.XML` file of Schema Creator Utility. For example: if the value set for `PREFIX_SCHEMA_NAME` is `DEV` and the schema name was mentioned as `ofsaconf`, then the actual schema created in the database would be `DEV_ofsaconf`.
- 
- 

## Configuring Class Loader for Apache Tomcat

1. Edit the `server.xml` available in `$TOMCAT_HOME/conf/` folder.
2. Add tag `<Loader delegate="true" />` within the `<Context>` tag, above the `<Resource>` tag. This is applicable only when the web application server is Apache Tomcat 8.

---

---

**Note:** This configuration is required if Apache Tomcat version is 8.

---

---

---

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## Configuring Work Manager in Web Application Servers

Process Modelling framework requires creation of Work Manager and mapping it to OFSAA instance. This configuration is required for WebSphere and WebLogic Web Application Server types.

This section covers the following topics:

- [Configuring Work Manager in WebSphere Application Server](#)
- [Configuring Work Manager in WebLogic Application Server](#)

### Configuring Work Manager in WebSphere Application Server

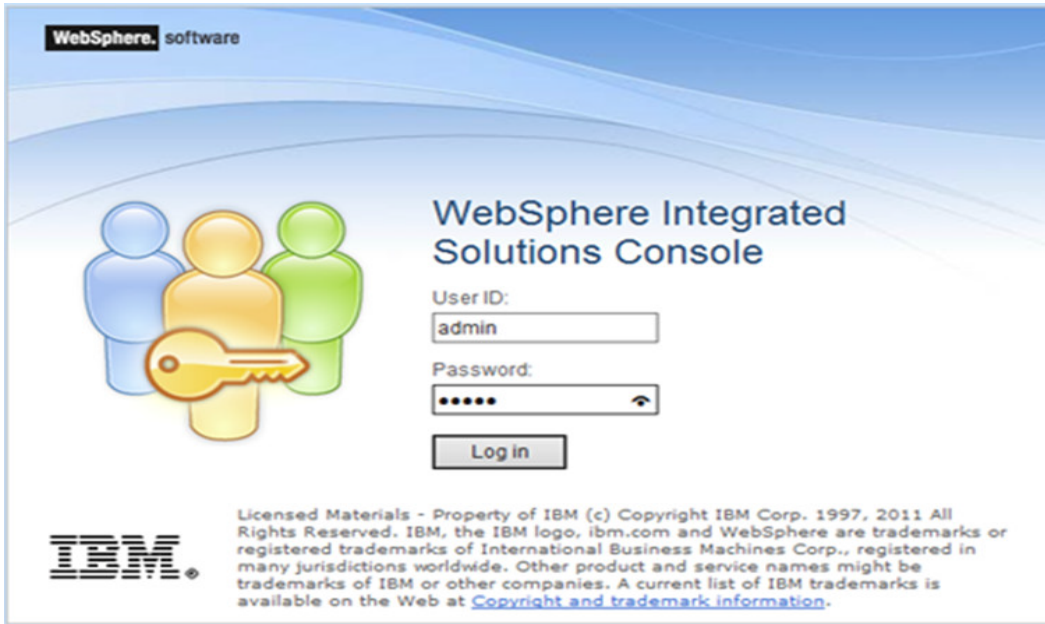
This section is applicable only when the Web Application Server type is WebSphere.

This section covers the following topics:

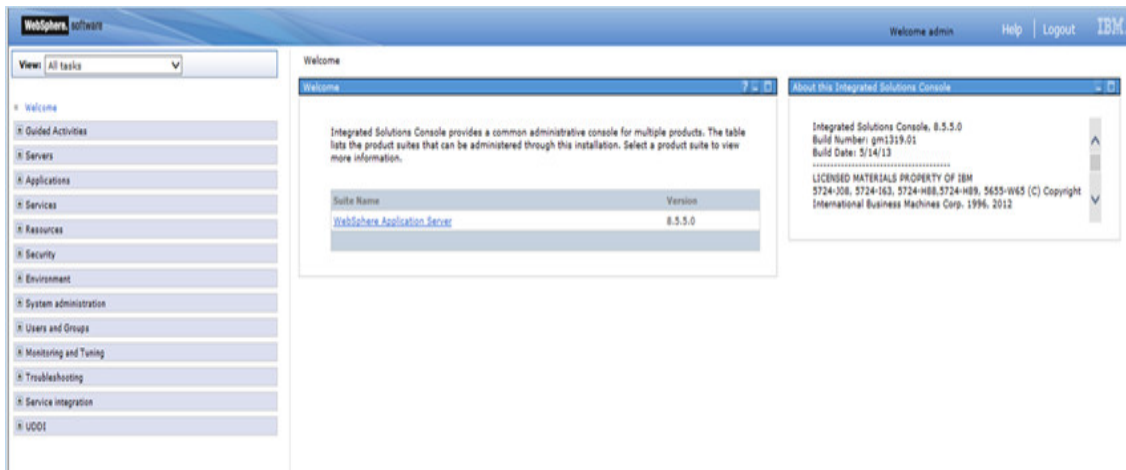
- [Creating Work Manager](#)
- [Mapping Work Manager to OFSAA WebSphere Instance](#)

### Creating Work Manager

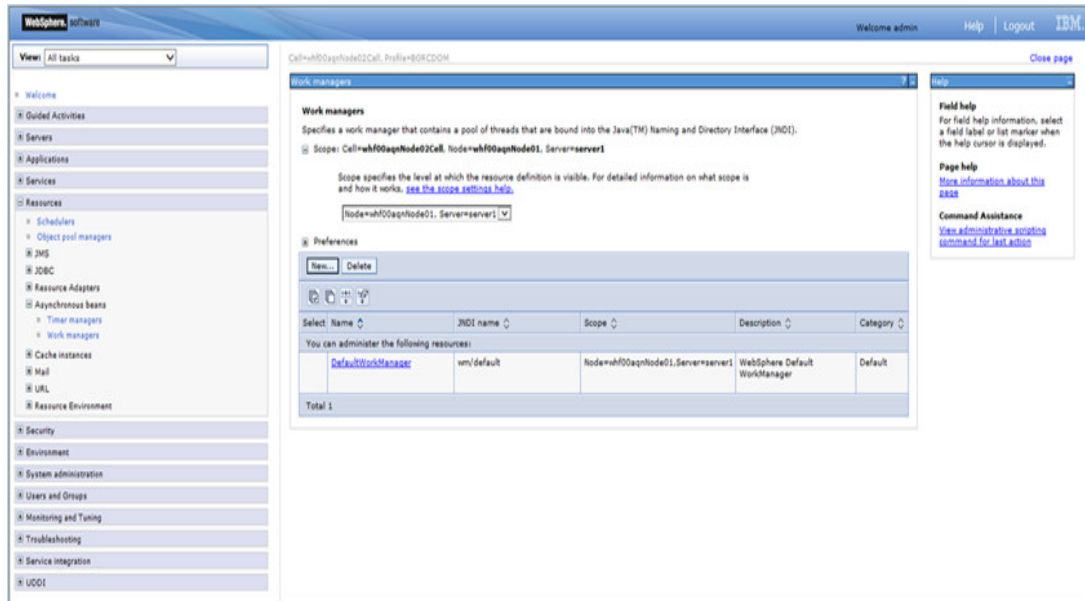
1. Open the WebSphere admin console in the browser window:  
`http://<ipaddress>:<administrative console port>/ibm/console`.  
(https if SSL is enabled). The Login window is displayed



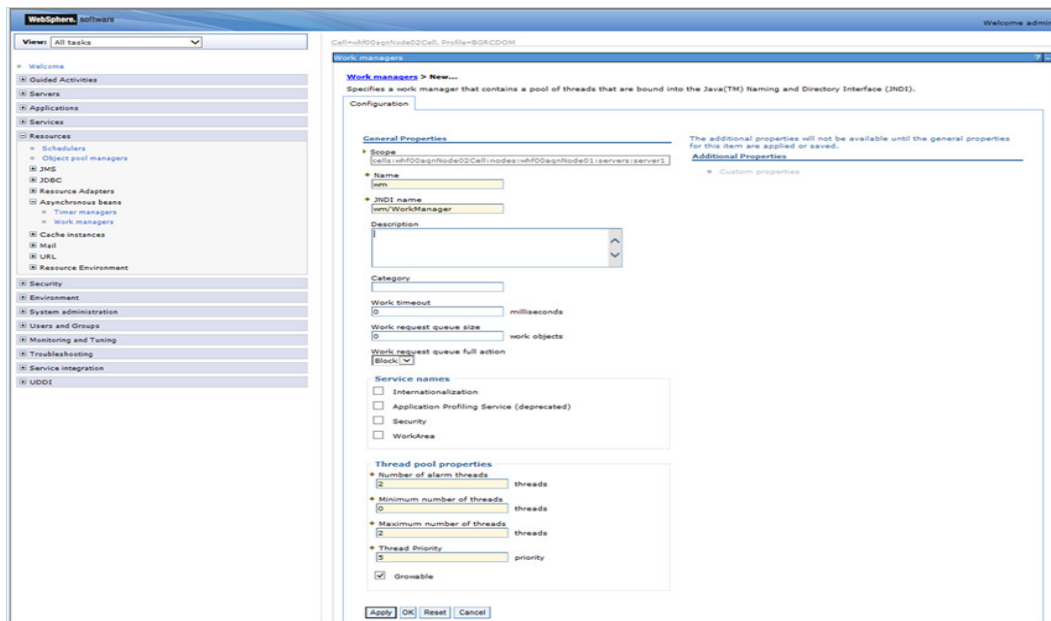
2. Login with the user id that has admin rights.



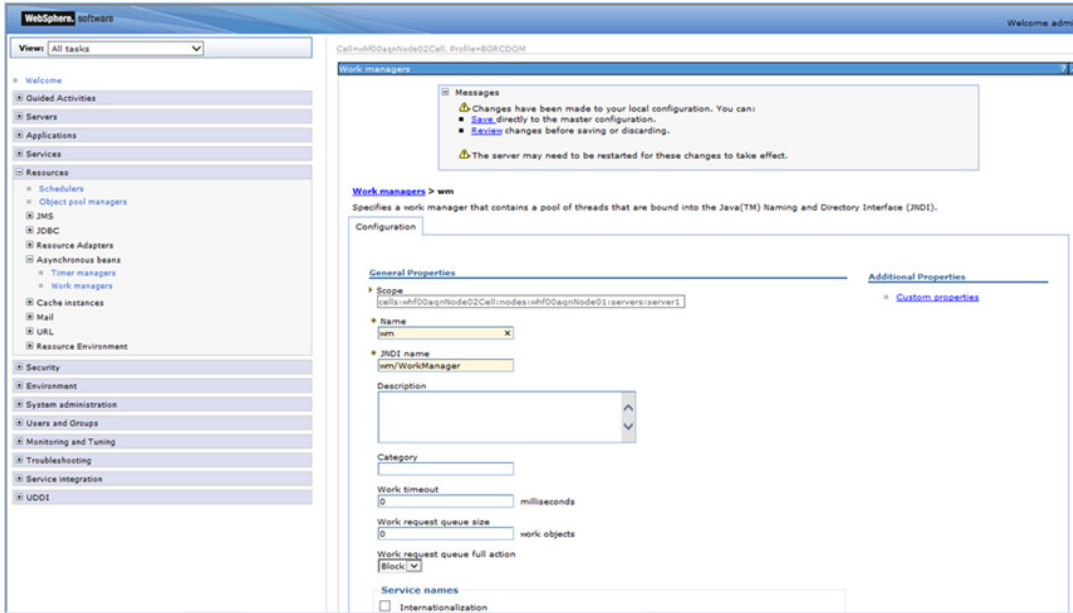
3. From the LHS menu, expand **Resources** > **Asynchronous beans** and select **Work Managers**.



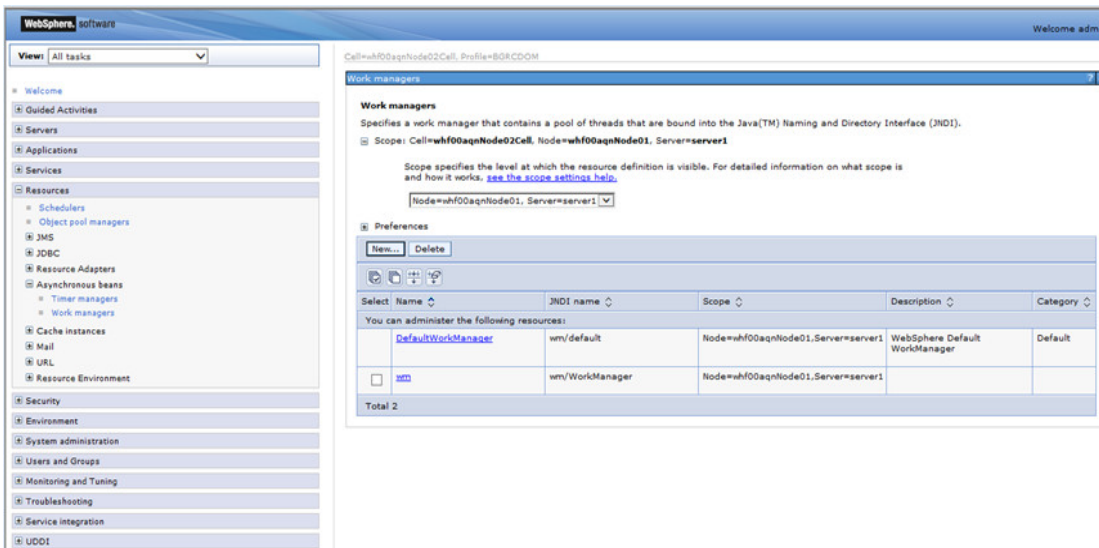
4. Select the required **Scope** from the drop-down list.  
For example, Node=whf00aqrNode01, Server=server1.
5. Click **New** in the Preferences section.



6. Enter the **Name** as 'wm' and **JNDI name** as 'wm/WorkManager' in the respective fields.
7. Enter the **Thread pool properties**.
8. Click **Apply**.



9. Click Save.

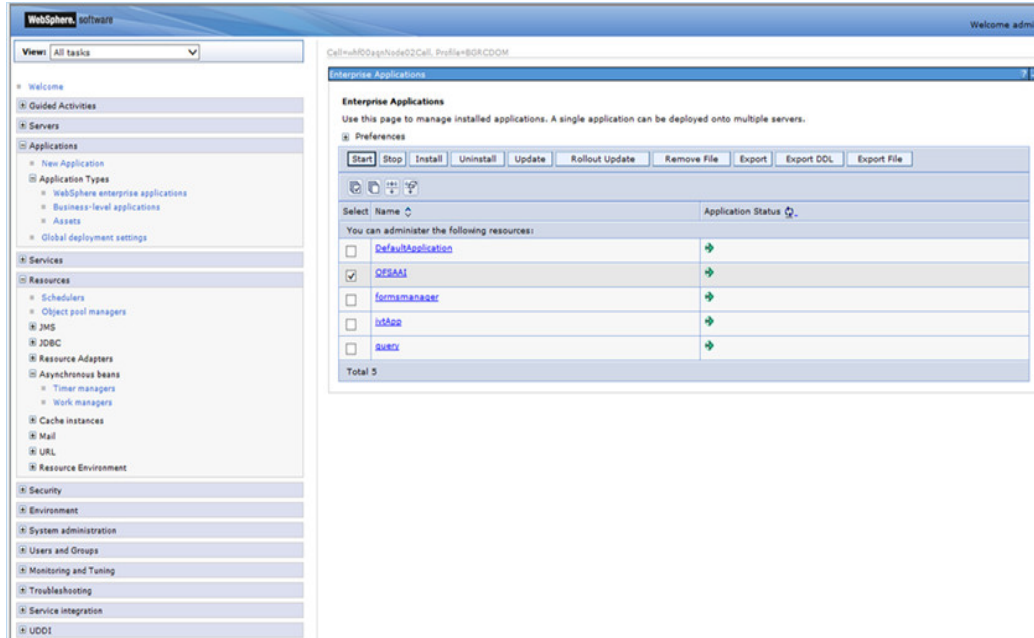


After creating work manager successfully, you have to map it to OFSAA instance.

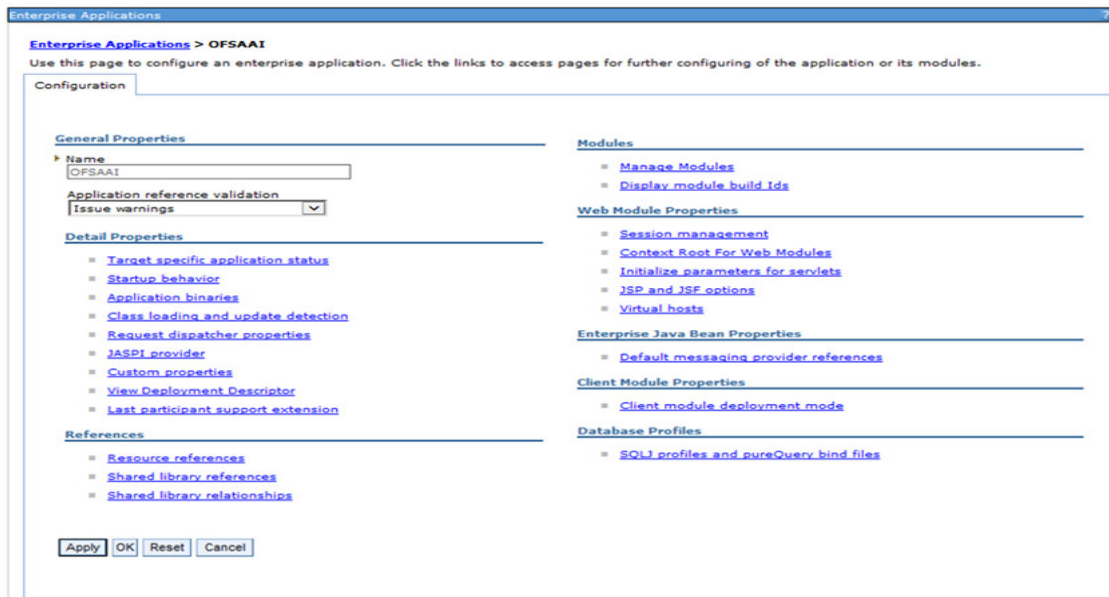
## Mapping Work Manager to OFSAA WebSphere Instance

1. From the LHS menu, expand **Applications > Application Types** and select **WebSphere enterprise applications**.

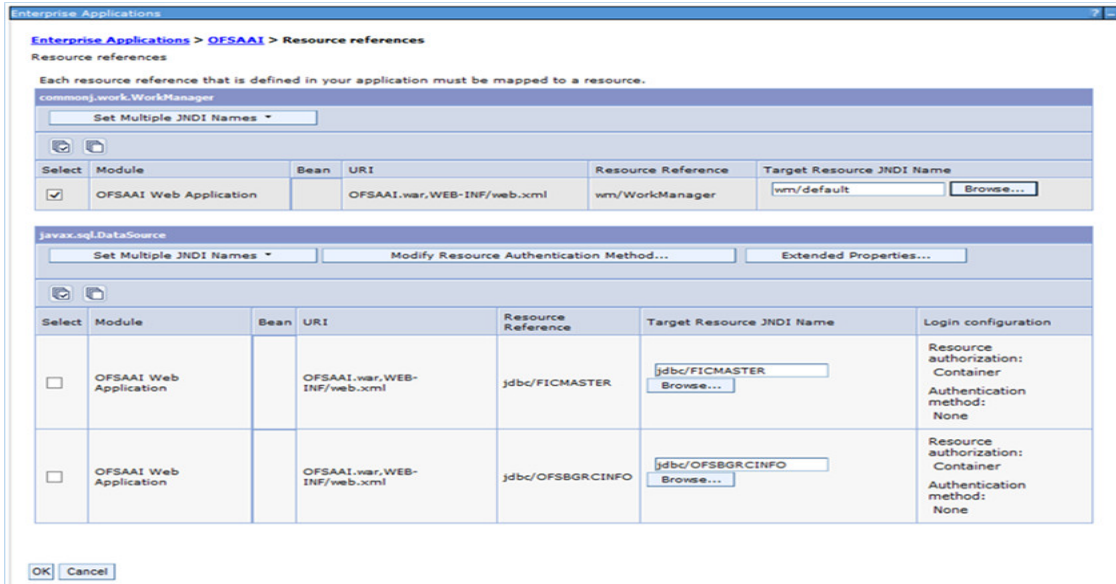




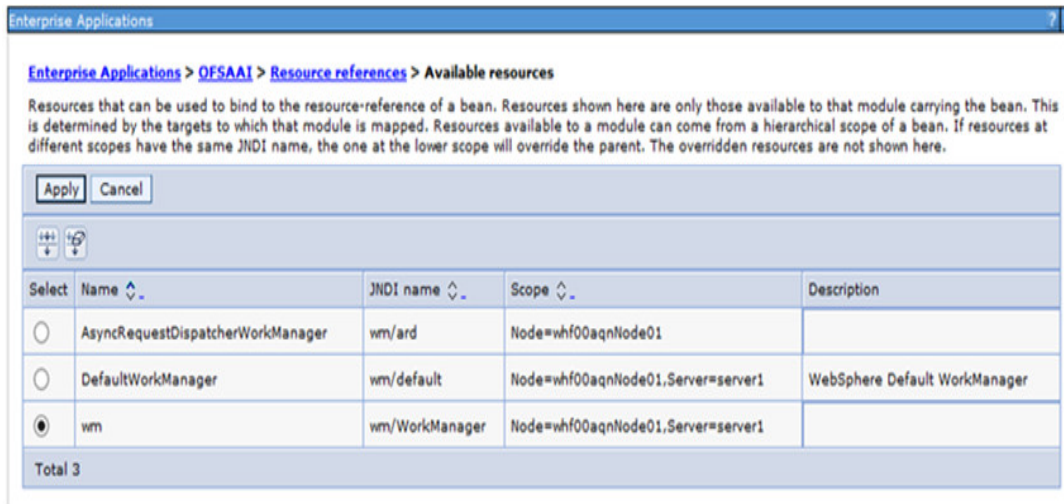
2. Click OFSAAI instance hyperlink.



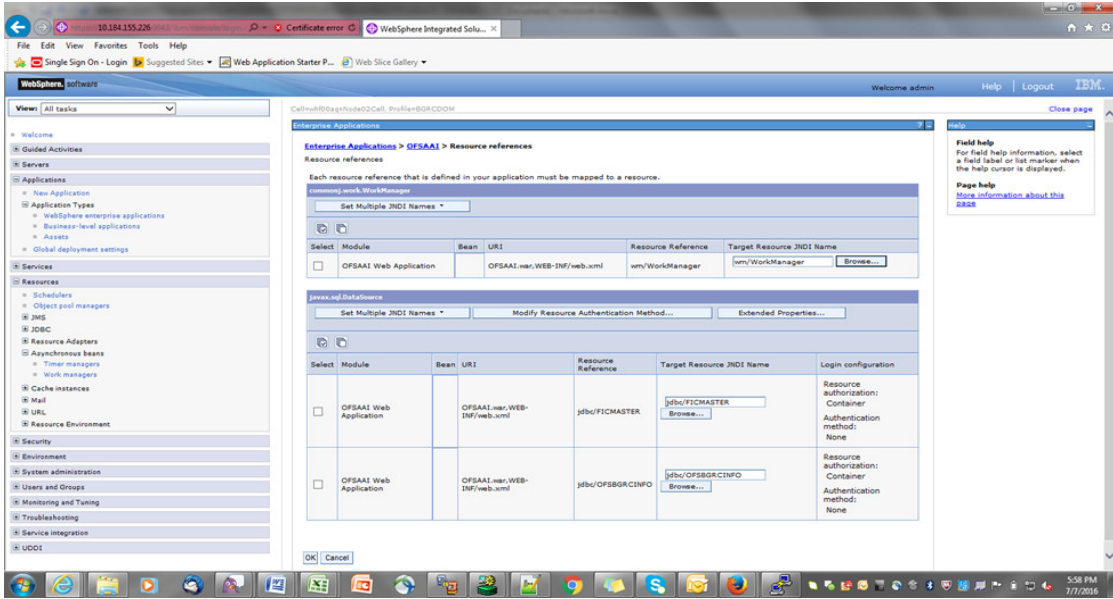
3. Click Resource references link under References section.



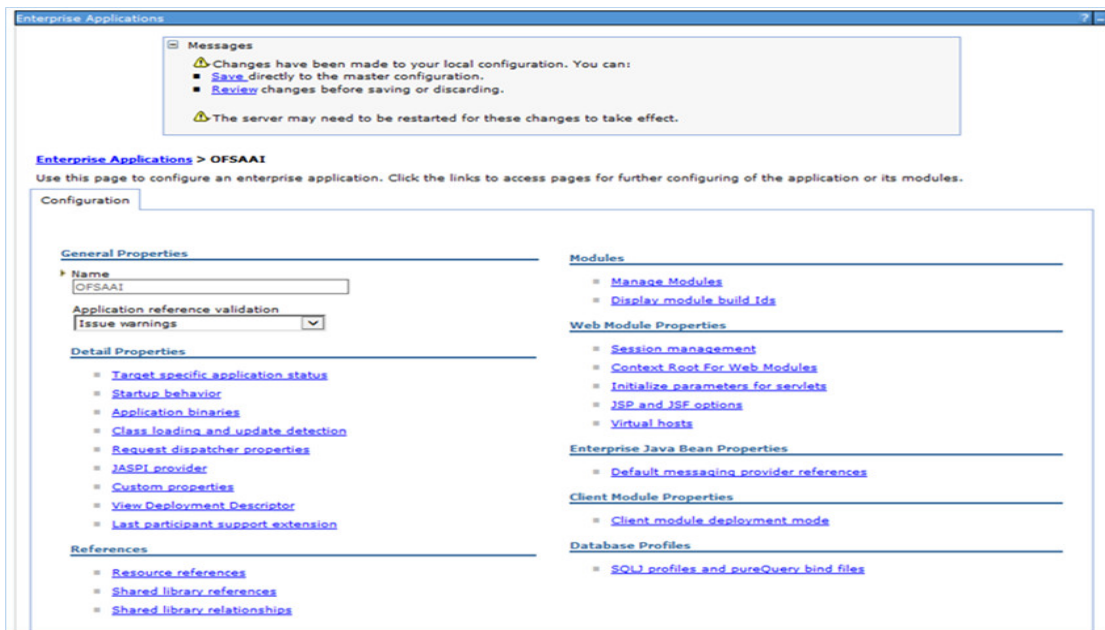
4. Click **Browse** corresponding to the Work Manager Resource Reference. The available resources are displayed.



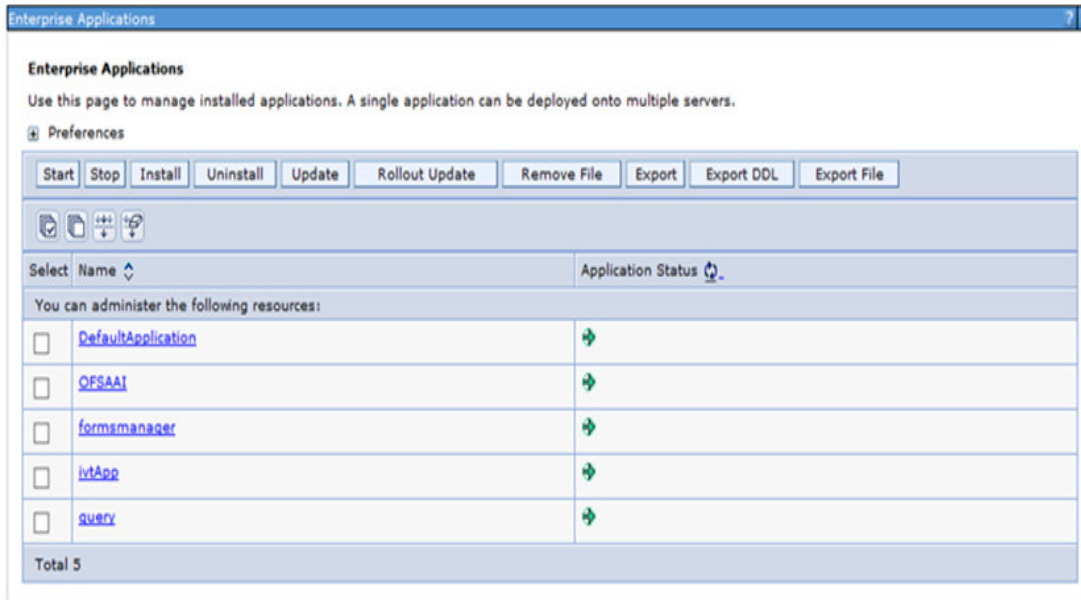
5. Select the newly created Work Manager ('wm') and click **Apply**.



6. Select the Work Manager ('wm/WorkManager') and click OK.



7. Click Save.



## Configuring Work Manager in WebLogic Application Server

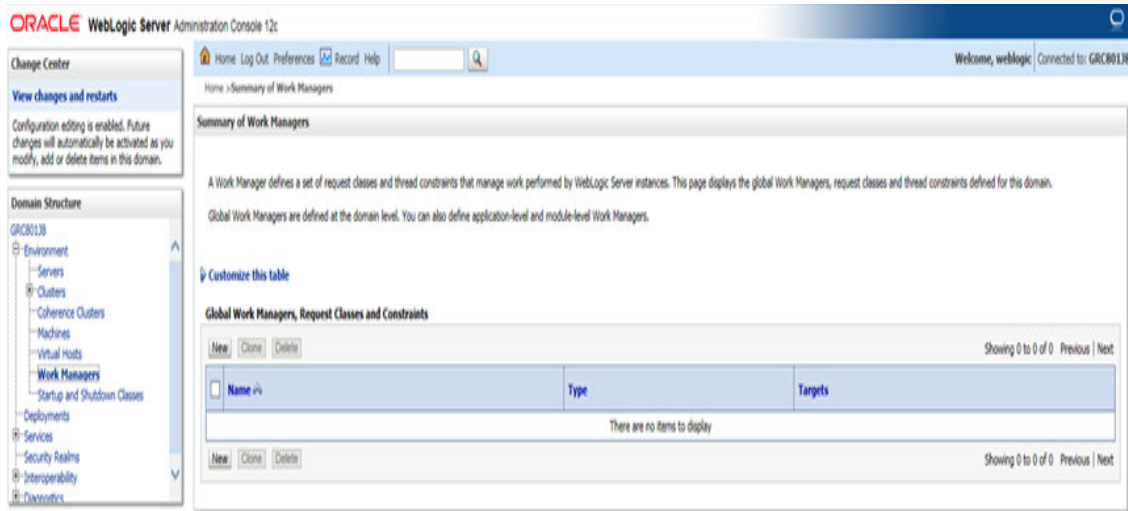
This section is applicable only when the Web Application Server type is WebLogic.

### Creating Work Manager

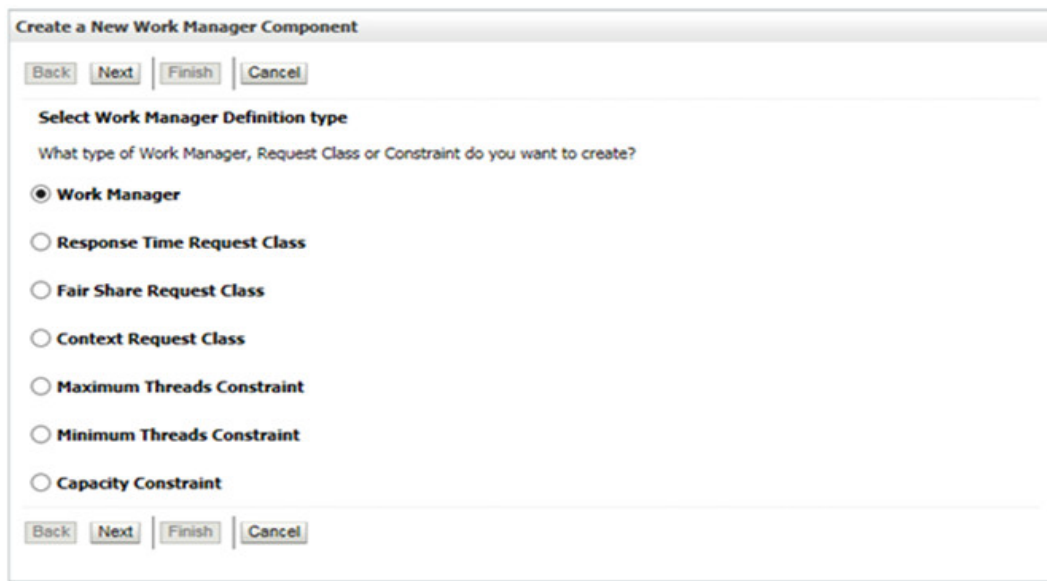
1. Open the WebLogic admin console in the browser window:  
`http://<ipaddress>:<administrative console port>/console.`  
 (https if SSL is enabled). The Welcome window is displayed.



2. Login with the user id that has admin rights.
3. From the Domain Structure menu in the LHS, expand **Environment** and select **Work Managers**. The Summary of Work Managers window is displayed.



4. Click **New** to create a new work manager component.



5. Select **Work Manager** and click **Next**.

The screenshot shows a web browser window with a navigation bar containing 'Home', 'Log Out', 'Preferences', 'Record', and 'Help'. Below the navigation bar, the breadcrumb 'Home > Summary of Work Managers' is visible. The main content area is titled 'Create a New Work Manager Component' and contains a set of navigation buttons: 'Back', 'Next', 'Finish', and 'Cancel'. The 'Next' button is highlighted. Below the buttons, the section is titled 'Work Manager Properties' and includes the text: 'The following properties will be used to identify your new Work Manager.' and '\* Indicates required fields'. A question asks 'What would you like to name your new Work Manager?'. The '\* Name:' label is followed by a text input field containing 'wm/WorkManager' and a close button 'x'. At the bottom, another set of navigation buttons 'Back', 'Next', 'Finish', and 'Cancel' is present.

6. Enter the **Name** as 'wm/WorkManager'.
7. Click **Next**.

The screenshot shows the same 'Create a New Work Manager Component' wizard, now at Step 8. The navigation buttons 'Back', 'Next', 'Finish', and 'Cancel' are at the top, with 'Finish' highlighted. The section is titled 'Select deployment targets' and includes the text: 'You can target the Work Manager to any of these WebLogic Server instances or Clusters. Select the same targets on which you will deploy applications that reference the Work Manager.' Below this, the text 'Available targets :' is followed by a list box. The list box has a header 'Servers' and contains one item, 'AdminServer', which is checked with a checkbox. At the bottom, another set of navigation buttons 'Back', 'Next', 'Finish', and 'Cancel' is present.

8. Select the required deployment target and click **Finish**.

Home Log Out Preferences Record Help Welcome, weblogic Connected to: GRC80138

Home > Summary of Work Managers

Messages

- ✔ All changes have been activated. No restarts are necessary.
- 🕒 Work Manager created successfully

**Summary of Work Managers**

A Work Manager defines a set of request classes and thread constraints that manage work performed by WebLogic Server instances. This page displays the global Work Managers, request classes and thread constraints defined for this domain.

Global Work Managers are defined at the domain level. You can also define application-level and module-level Work Managers.

[Customize this table](#)

**Global Work Managers, Request Classes and Constraints**

New Clone Delete Showing 1 to 1 of 1 Previous | Next

<input type="checkbox"/> Name ↕	Type	Targets
<input type="checkbox"/> wmy/WorkManager	Work Manager	AdminServer

New Clone Delete Showing 1 to 1 of 1 Previous | Next





---

---

## Creating and Deploying EAR/ WAR File

This section covers the following topics:

- [Creating EAR/WAR File](#)
- [Deploying EAR/WAR File](#)

### Creating EAR/WAR File

To create EAR/WAR File, follow these steps:

1. Navigate to the \$FIC\_WEB\_HOME directory on the OFSAA Installed server.
2. Execute `./ant.sh` to trigger the creation of EAR/ WAR file.
3. On completion of the EAR files creation, the "BUILD SUCCESSFUL" and "Time taken" message is displayed and you will be returned to the prompt.

*Figure D-1 Creating EAR/ WAR File*

```
/scratch/ofsaaweb>cd /scratch/ofsaaweb/OFSA80/ficweb
/scratch/ofsaaweb/OFSA80/ficweb>
/scratch/ofsaaweb/OFSA80/ficweb>ls
ant.sh                               ficwebChecksum.sh
apache-ant-1.7.1                    ficweb_InstalledChecksum.txt
application.xml                      lib
build.xml                            MANIFEST.MF
conf                                  mycertificates
ficweb_Build_CheckSum.txt           OFSALMINFO_FusionMenu.xml
ficwebCheckSum.log                  unix
ficwebChecksum.properties           webroot
/scratch/ofsaaweb/OFSA80/ficweb>./ant.sh
executing "ant"
Buildfile: build.xml

createwar:
  [war] Building war: /scratch/ofsaaweb/OFSA80/ficweb/AAI80.war

createear:
  [ear] Building ear: /scratch/ofsaaweb/OFSA80/ficweb/AAI80.ear

BUILD SUCCESSFUL
Total time: 2 minutes 8 seconds
/scratch/ofsaaweb/OFSA80/ficweb>
```

4. The EAR/ WAR file - <contextname>.ear/ .war - is created.

---

---

**Note:** The <contextname> is the name given during installation. This process overwrites any existing version of EAR file that exists in the path.

In case of OFSAA configured on Tomcat installation, <contextname>.war is created.

---

---

## Deploying EAR/WAR File

---

---

**Note:** Remove the existing Admin Tools deployment (which is integrated with OFS ECM pack).

---

---

This section covers the following topics:

- [Deploying EAR/WAR Files on WebSphere](#)
- [Deploying EAR/WAR files for WebLogic](#)
- [Deploying Tomcat WAR Files on Tomcat](#)

---

---

**Note:** Ensure to clear the application cache prior to the deployment of Applications Pack Web Archive. This is applicable to all Web servers (WebSphere, WebLogic, and Tomcat). For more information, see [Clearing Application Cache](#) section.

---

---

### Deploying EAR/WAR Files on WebSphere

To deploy Infrastructure application in WebSphere:

1. Start WebSphere Profile by navigating to the path "<WebSphere\_Installation\_Directory>/IBM/WebSphere/AppServer/profiles/<Profile\_Name>/bin/" and execute the command:  

```
./startServer.sh server1
```
2. Open the following URL in the browser: `http://<ipaddress>:<Administrative Console Port>/ibm/console`. (https if SSL is enabled). The login screen is displayed.

Figure D–2 Login Window



WebSphere. software

WebSphere Integrated Solutions Console

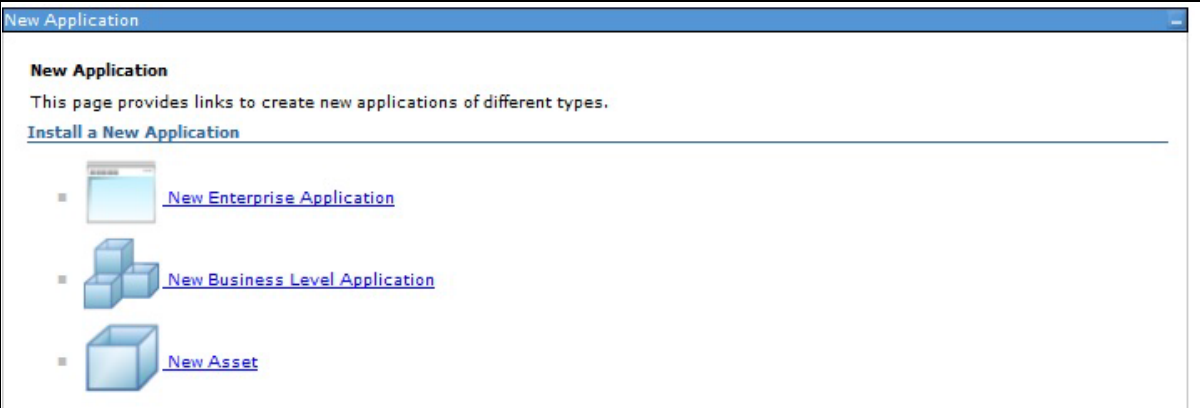
User ID:

Password:

IBM  
 Licensed Materials - Property of IBM (c) Copyright IBM Corp. 1997, 2011 All Rights Reserved. IBM, the IBM logo, ibm.com and WebSphere are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at [Copyright and trademark information](#).

3. Enter the user credentials which has administrator rights and click **Log In**.
4. From the LHS menu, select **Applications** and click **New Application**. The New Application window is displayed.




Figure D–3 New Application



New Application

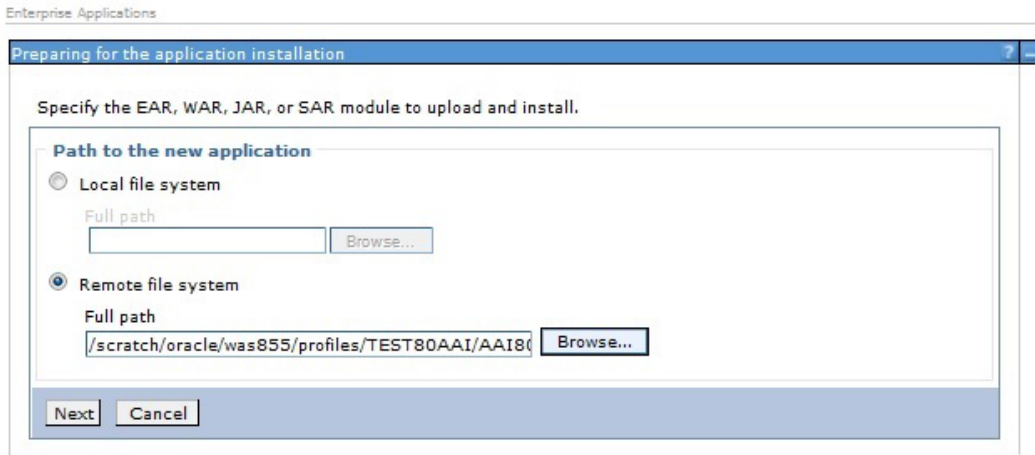
**New Application**  
 This page provides links to create new applications of different types.

**Install a New Application**

-  [New Enterprise Application](#)
-  [New Business Level Application](#)
-  [New Asset](#)

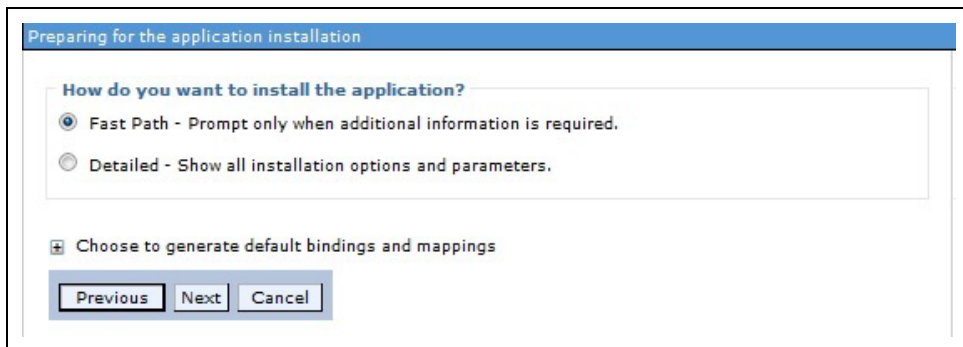
5. Click **New Enterprise Application**. The Preparing for the application installation window is displayed.

**Figure D-4** Preparing for the application installation



6. Select **Remote File System** and click **Browse**. Select the EAR file generated for OFSAAI to upload and install. Click **Next**.

**Figure D-5** Installation Options



7. Select the **Fast Path** option and click **Next**. The Install New Application window is displayed.

Figure D-6 Install New Application

Specify options for installing enterprise applications and modules.

→ **Step 1: Select installation options**

[Step 2: Map modules to servers](#)

[Step 3: Summary](#)

**Select installation options**

Specify the various options that are available for your application.

Precompile JavaServer Pages files

Directory to install application

Distribute application

Use Binary Configuration

Deploy enterprise beans

Application name

Create MBeans for resources

Override class reloading settings for Web and EJB modules

Reload interval in seconds

Deploy Web services

Validate Input off/warn/fail

Process embedded configuration

**File Permission**

Allow all files to be read but not written to  
 Allow executables to execute  
 Allow HTML and image files to be read by everyone

Application Build ID

Allow dispatching includes to remote resources

Allow servicing includes from remote resources

Business level application name

Asynchronous Request Dispatch Type

Allow EJB reference targets to resolve automatically

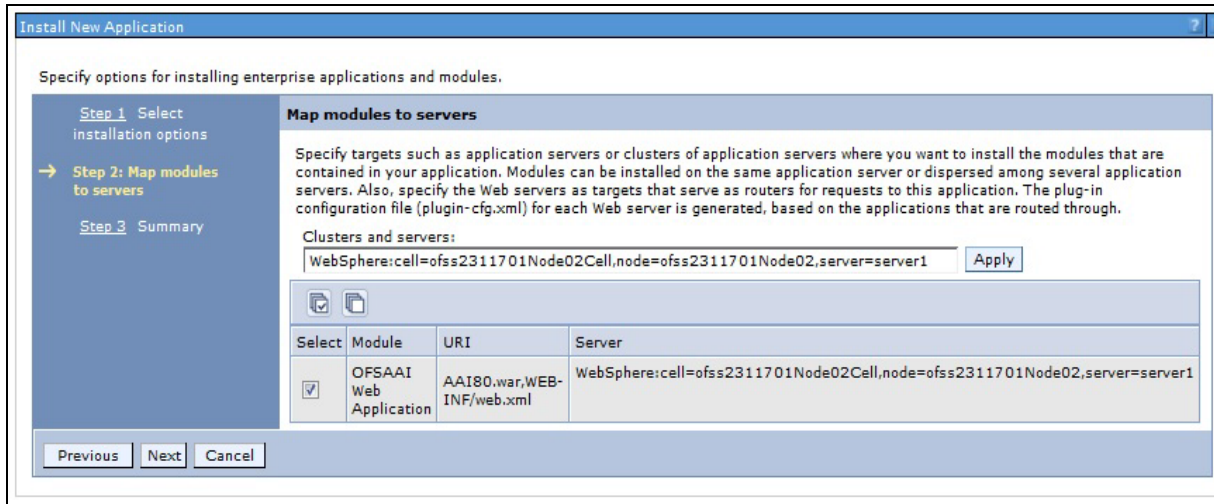
Deploy client modules

Client deployment mode

Validate schema

8. Enter the required information and click **Next**. The Map Modules to Servers window is displayed.

**Figure D-7 Map Modules to Servers**



9. Select the **Web Application** and click **Next**. The Map Resource References to Resources window is displayed.

Figure D-8 Map Resource References to Resources

Specify options for installing enterprise applications and modules.

**Map resource references to resources**

Each resource reference that is defined in your application must be mapped to a resource.

**commonj.work.WorkManager**

Set Multiple JNDI Names ▾

Select	Module	Bean	URI	Resource Reference	Target Resource JNDI Name
<input type="checkbox"/>	OFSAAI Web Application		BD801Q.war,WEB-INF/web.xml	wm/WorkManager	<input type="text"/> Browse...

**javax.sql.DataSource**

Set Multiple JNDI Names ▾    Modify Resource Authentication Method...    Extended Properties...

Select	Module	Bean	URI	Resource Reference	Target Resource JNDI Name	Login configuration
<input type="checkbox"/>	OFSAAI Web Application		BD801Q.war,WEB-INF/web.xml	jdbc/FICMASTER	<input type="text"/> Browse...	Resource authorization: Container Authentication method: None
<input type="checkbox"/>	OFSAAI Web Application		BD801Q.war,WEB-INF/web.xml	jdbc/analyst	<input type="text"/> Browse...	Resource authorization: Container Authentication method: None
<input type="checkbox"/>	OFSAAI Web Application		BD801Q.war,WEB-INF/web.xml	jdbc/miner	<input type="text"/> Browse...	Resource authorization: Container Authentication method: None
<input type="checkbox"/>	OFSAAI Web Application		BD801Q.war,WEB-INF/web.xml	jdbc/BD801QT	<input type="text"/> Browse...	Resource authorization: Container Authentication method: None

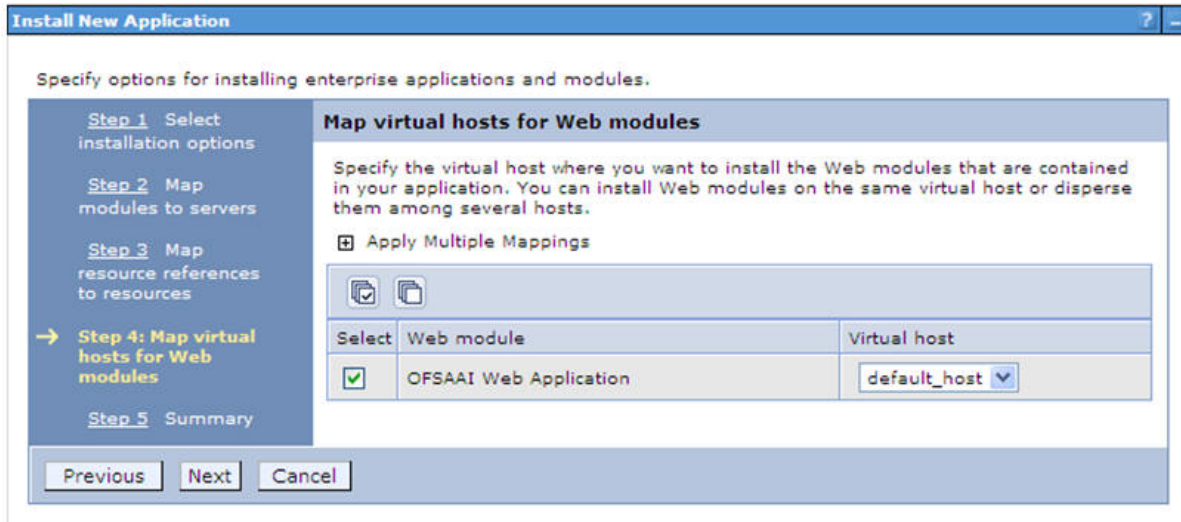
10. Map each resource defined in the application to a resource JNDI name defined earlier.

11. Click **Modify Resource Authentication Method** and specify the authentication method created earlier.

You can specify "config" for FICMASTER resource or "atomic" for atomic resource as the authentication method.

12. Select the **OFSAAI Web Application** check box and click **Next**. The Map Virtual hosts for Web Modules window is displayed.

Figure D–9 Map Virtual host for Web Modules



13. Select the **Web Application** check box and click **Next**. The Summary page is displayed.



Figure D-10 Summary

Specify options for installing enterprise applications and modules.

[Step 1](#) Select installation options

[Step 2](#) Map modules to servers

[Step 3](#) Map resource references to resources

[Step 4](#) Map virtual hosts for Web modules

→ **Step 5: Summary**

### Summary

Summary of installation options

Options	Values
Precompile JavaServer Pages files	No
Directory to install application	
Distribute application	Yes
Use Binary Configuration	No
Deploy enterprise beans	Yes
Application name	AAI80
Create MBeans for resources	Yes
Override class reloading settings for Web and EJB modules	No
Reload interval in seconds	
Deploy Web services	No
Validate Input off/warn/fail	warn
Process embedded configuration	No
File Permission	.*\,dll=755#.*\,so=755#.*\,a=755#.*\,sl=755
Application Build ID	Unknown
Allow dispatching includes to remote resources	No
Allow servicing includes from remote resources	No
Business level application name	
Asynchronous Request Dispatch Type	Disabled
Allow EJB reference targets to resolve automatically	No
Deploy client modules	No
Client deployment mode	Isolated
Validate schema	No
Cell/Node/Server	<a href="#">Click here</a>

Previous Finish Cancel

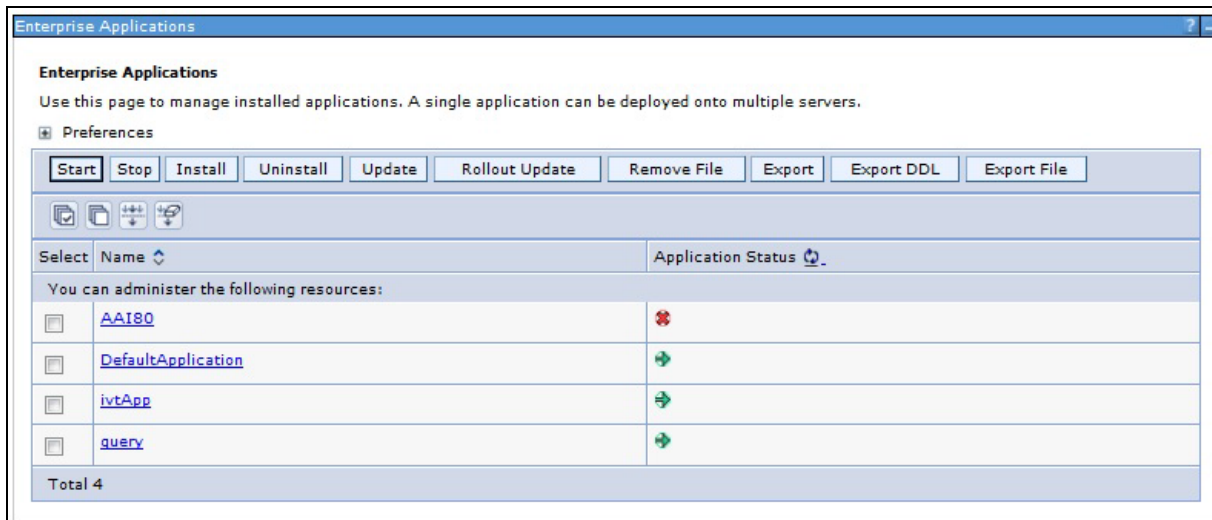
14. Click **Finish** and deploy the Infrastructure Application on WebSphere.  
On successful installation, a message is displayed.
15. Click **Save** and save the master file configuration. The details are displayed in the Master File Configuration window.

### Start the Application

To start the application, follow these steps:

1. Expand **Applications > Application Type > WebSphere enterprise applications**. The Enterprise Applications window is displayed.

Figure D–11 Enterprise Application



2. Select the installed application and click **Start**.

---



---

**Note:**

- <profile name> is the profile name given while creating the WebSphere profile.
  - <cell name > is the cell name given during profile creation.
  - <contextname> is the context name given during installation.
- 
- 

## Deploying EAR/WAR files for WebLogic

Following are the steps for deploying Infrastructure application that would be created during installation:

1. Navigate to the path "<WebLogic Installation directory>/user\_projects/domains/<domain name>/bin" in the machine in which WebLogic is installed.
2. Start WebLogic by executing the command:  
./startWebLogic.sh -d64 file
3. Open the URL in the browser window: http://<ipaddress>:<admin server port>/console. (https if SSL is enabled). The Sign in window of the WebLogic Server Administration Console is displayed.

---



---

**Note:** Ensure that you have started Infrastructure Server by executing ". /startofsaai.sh" as mentioned in *Starting Infrastructure Services* section.

---

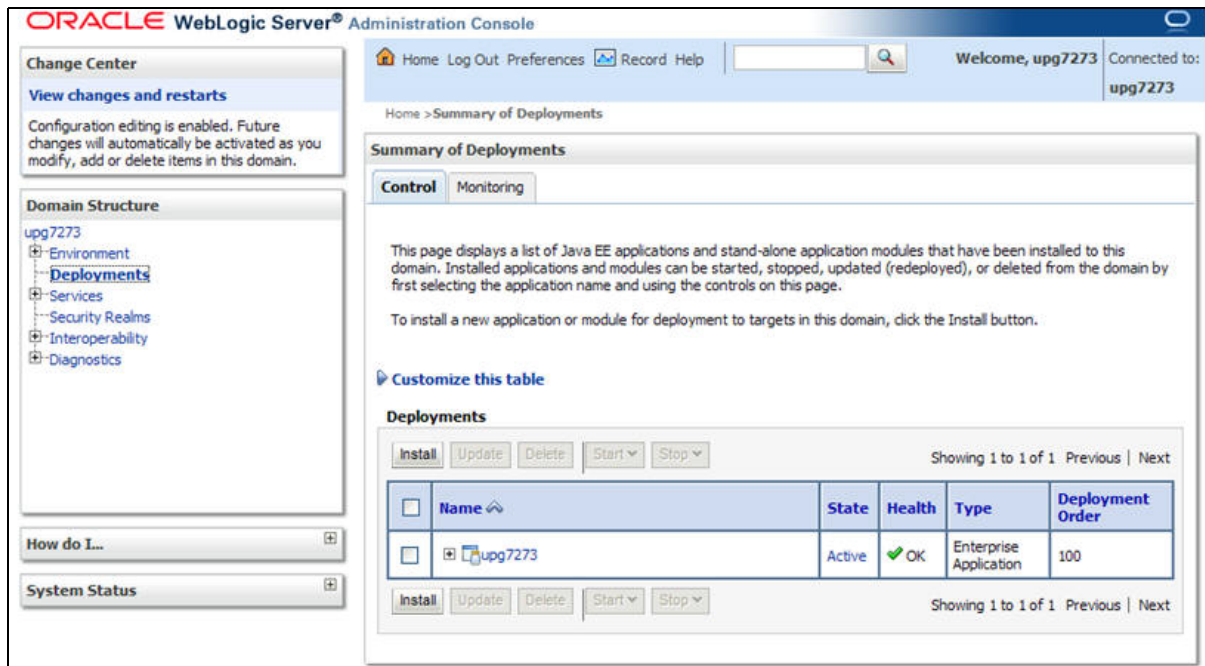


---

4. Log on to the WebLogic Server by entering the user credentials having privileges to deploy the EAR file.

- From the **Domain Structure** LHS menu, click **Deployments**. The Summary of Deployments window is displayed.

**Figure D–12 Summary of Deployments**



- Click **Install**. The Install Application Assistant window is displayed.
- Select the Exploded EAR directory after browsing to the directory where it is saved and click **Next**.

## Explode EAR File

To explode EAR, follow these steps:

- Create the "applications" folder under domain name. For example, `"/Bea/user_projects/domains/<Domain_name>/applications"`.
- Create `<context_name>.ear` folder under "applications" folder.
- Copy the `<$FIC_WEB_HOME/<context_name>.ear` file to `<WEBLOGIC_INSTALL_DIR>/Bea/user_projects/domains/<DOMAIN_NAME>/applications/<context_name>.ear`.
- Explode the `<context_name>.ear` file by executing the command:
 

```
jar -xvf <context_name>.ear
```
- Delete the `<context>.ear` and `<context>.war` files (recently created) `<WEBLOGIC_INSTALL_DIR>/Bea/user_projects/domains/<DOMAIN_NAME>/applications/<context_name>.ear`.
- Create a directory `<context_name>.war` under `<WEBLOGIC_INSTALL_DIR>/Bea/user_projects/domains/<DOMAIN_NAME>/applications/<context_name>.ear`.
- Copy `<$FIC_WEB_HOME/<context_name>.war` file to `<WEBLOGIC_INSTALL_DIR>/Bea/user_projects/domains/<DOMAIN_NAME>/applications/<context_name>.ear/<context_name>.war`.

8. Explode the <context\_name>.war file by executing the following command to get the directory structure:

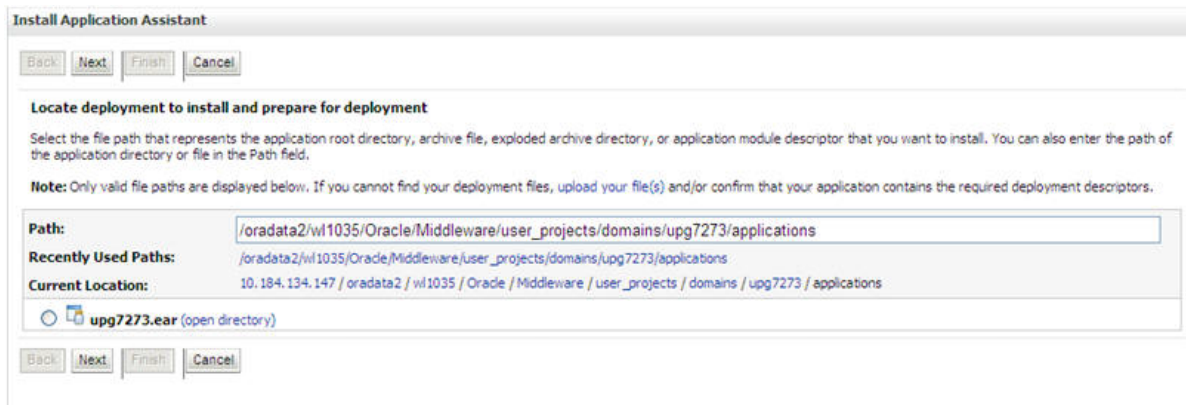
```
jar -xvf <context_name>.war
```

## Install Application

To install Application, follow these steps:

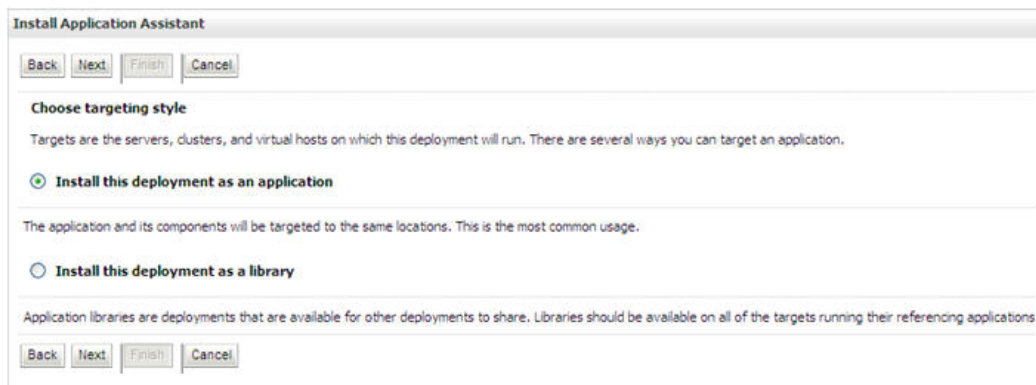
1. Open the Install Application Assistant.

**Figure D–13 Install Application Assistant**



2. Click Next.

**Figure D–14 Install Application Assistant**



3. From the Choose targeting style section, select the **Install this deployment as an application** option and click **Next**.

The Optional Settings window is displayed.

Figure D–15 Optional Settings

**Install Application Assistant**

Back Next Finish Cancel

**Optional Settings**  
You can modify these settings or accept the defaults.

**General**

What do you want to name this deployment?

Name:

**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.

Custom Roles and Policies: Use only roles and policies that are defined in the Administration Console.

Advanced: Use a custom model that you have configured on the realm's configuration page.

**Source accessibility**

How should the source files be made accessible?

Use the defaults defined by the deployment's targets

Recommended selection.

Copy this application onto every target for me

During deployment, the files will be copied automatically to the managed servers to which the application is targeted.

I will make the deployment accessible from the following location

Location:

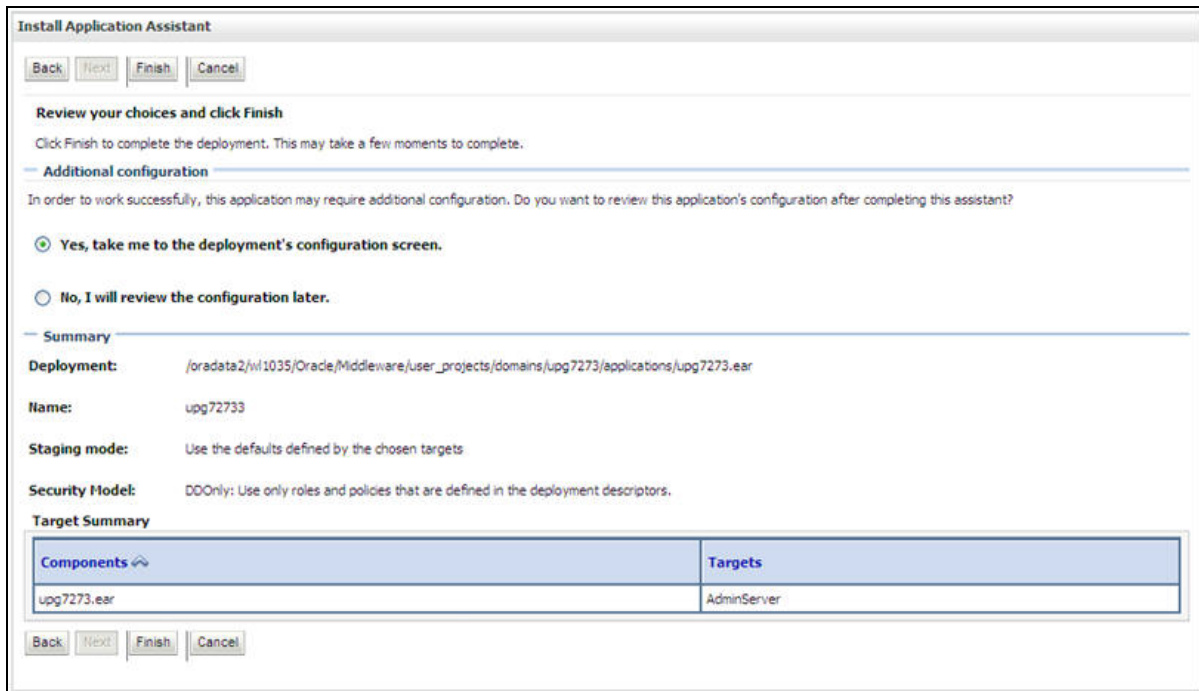
Provide the location from where all targets will access this application's files. This is often a shared directory. You must ensure the application files exist in this location and that each target can reach the location.

Back Next Finish Cancel

4. Enter a **Name** for the deployment if required.
5. Under the Security section, select the **DD only** option to specify that only roles and policies that are defined in the deployment descriptors should be used.
6. Select the **I will make the deployment available from the following location** option under the Source accessibility section.
7. Click **Next** to continue.

The Deployment Summary window is displayed.

**Figure D–16 Deployment Summary**



8. Select the **Yes, take me to the deployment's configuration screen** option and click **Finish**.

The Settings for <Deployment Name> window is displayed.

Figure D-17 Settings for &lt;Deployment Name&gt;

Settings for upg7273

Overview | Deployment Plan | Configuration | Security | Targets | Control | Testing | Monitoring | Notes

Save

Use this page to view the general configuration of an Enterprise application, such as its name, the physical path to the application files, the associated deployment plan, and so on. The table at the end of the page lists the modules (such as Web applications and EJBs) that are contained in the Enterprise application. Click on the name of the module to view and update its configuration.

<b>Name:</b>	upg7273	The name of this Enterprise Application. <a href="#">More Info...</a>
<b>Path:</b>	/oradata2/v1035/Oracle/Middleware/user_projects/domains/upg7273/applications/upg7273.ear	The path to the source of the deployable unit on the Administration Server. <a href="#">More Info...</a>
<b>Deployment Plan:</b>	(no plan specified)	The path to the deployment plan document on Administration Server. <a href="#">More Info...</a>
<b>Staging Mode:</b>	(not specified)	The mode that specifies whether a deployment's files are copied from a source on the Administration Server to the Managed Server's staging area during application preparation. <a href="#">More Info...</a>
<b>Security Model:</b>	DDOnly	The security model that is used to secure a deployed module. <a href="#">More Info...</a>
<b>Deployment Order:</b>	<input type="text" value="100"/>	An integer value that indicates when this unit is deployed, relative to other deployable units on a server, during startup. <a href="#">More Info...</a>
<b>Deployment Principal Name:</b>	<input type="text"/>	A string value that indicates what principal should be used when deploying the file or archive during startup and shutdown. This principal will be used to set the current subject when calling out into application code for interfaces such as ApplicationLifecycleListener. If no principal name is specified, then the anonymous principal will be used. <a href="#">More Info...</a>

Save

**Modules and Components**

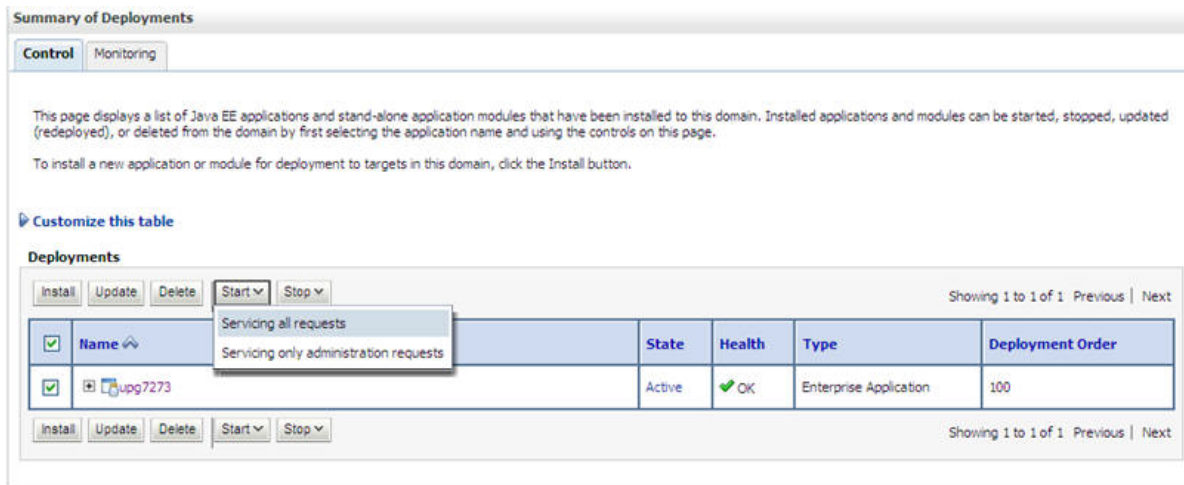
Showing 1 to 1 of 1 Previous | Next

Name	Type
[-] upg7273	Enterprise Application
[-] EJBs	
[-] StatelessCacheBeanBean	EJB
[-] Modules	
[-] /upg7273	Web Application
[-] beancache.jar	EJB Module
[-] Web Services	
None to display	

Showing 1 to 1 of 1 Previous | Next

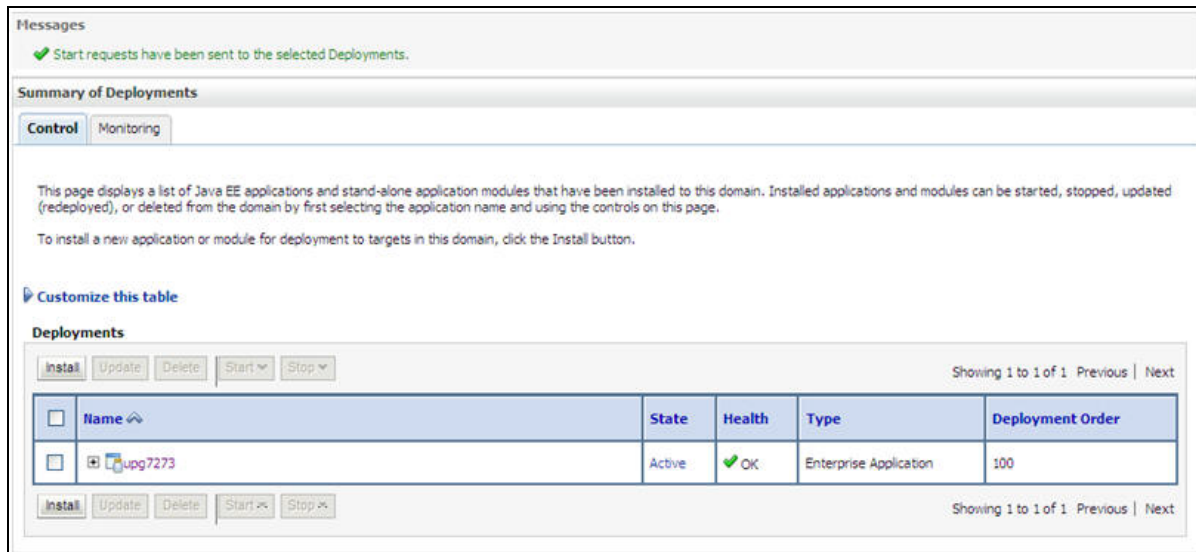
9. Review the general configuration details of the deployment. You can also update the configuration of the deployment in this window. In the Overview tab, you can view the complete deployment configuration.
10. Click **Save** to update the changes, if any.
11. From the LHS menu, click **Deployments**.  
The Summary of Deployments window is displayed.

Figure D–18 Summary of Deployments



12. Select the newly deployed Infrastructure application and click **Start > Servicing all requests**. Ensure that the Infrastructure server is up and running.

Figure D–19 Summary of Deployments



13. The **State** of the deployed application will be displayed as **Active** if started successfully.

## Deploying Tomcat WAR Files on Tomcat

Before deploying the WAR files, ensure that the previously deployed applications of Infrastructure are uninstalled. See *Uninstalling Previously Deployed WAR Files in Tomcat* for the procedure to uninstall the previously deployed Infrastructure war files.


On the machine that hosts Tomcat, follow these steps to deploy Infrastructure application:

1. Copy the <context-name>.war from \$FIC\_WEB\_HOME/<context-name.war> to <Tomcat Installation Directory>/webapps/ directory.




Figure D–20 Tomcat Home Page

Home Documentation Configuration Wiki Mailing Lists Find Help

**Apache Tomcat/7.0.19**  The Apache Software Foundation  
http://www.apache.org/

If you're seeing this, you've successfully installed Tomcat. Congratulations!

 Recommended Reading:

- [Security Considerations HOW-TO](#)
- [Manager Application HOW-TO](#)
- [Clustering/Session Replication HOW-TO](#)

Server Status  
Manager App  
Host Manager

**Developer Quick Start**

<a href="#">Tomcat Setup</a>	<a href="#">Realms &amp; AAA</a>	<a href="#">Servlet Examples</a>	<a href="#">Servlet Specifications</a>
<a href="#">First Web Application</a>	<a href="#">JDBC DataSources</a>	<a href="#">JSP Examples</a>	<a href="#">Tomcat Versions</a>

**Managing Tomcat**

For security, access to the [manager webapp](#) is restricted. Users are defined in:

```
SCATALINA_HOME/conf/tomcat-users.xml
```

In Tomcat 7.0 access to the manager application is split between different users.  
[Read more...](#)

[Release Notes](#)  
[Changelog](#)  
[Migration Guide](#)  
[Security Updates](#)

**Documentation**

[Tomcat 7.0 Documentation](#)  
[Tomcat 7.0 Configuration](#)  
[Tomcat Wiki](#)

Find additional important configuration information in:

```
SCATALINA_HOME/RUNNING.txt
```

Developers may be interested in:

- [Tomcat 7.0 Bug Database](#)
- [Tomcat 7.0 JavaDocs](#)
- [Tomcat 7.0 SVN Repository](#)
- [Tomcat 7.0 Examples](#)

**Getting Help**

**FAQ**

**Mailing Lists**

The following mailing lists are available:

- [announce@tomcat.apache.org](mailto:announce@tomcat.apache.org)  
Important announcements, releases, security vulnerability notifications. (Low volume).
- [users@tomcat.apache.org](mailto:users@tomcat.apache.org)  
User support and discussion
- [taolibs-user@tomcat.apache.org](mailto:taolibs-user@tomcat.apache.org)  
User support and discussion for [Apache Taglibs](#)
- [dev@tomcat.apache.org](mailto:dev@tomcat.apache.org)  
Development mailing list, including commit messages

Other Downloads	Other Documentation	Get Involved	Miscellaneous	Apache Software Foundation
<a href="#">Tomcat Connectors</a>	<a href="#">Tomcat Connectors</a>	<a href="#">Overview</a>	<a href="#">Contact</a>	<a href="#">Who We Are</a>
<a href="#">Tomcat Native</a>	<a href="#">mod_ik Documentation</a>	<a href="#">SVN Repositories</a>	<a href="#">Legal</a>	<a href="#">Heritage</a>
<a href="#">Taglibs</a>	<a href="#">Tomcat Native</a>	<a href="#">Mailing Lists</a>	<a href="#">Sponsorship</a>	<a href="#">Apache Home</a>
<a href="#">Deployer</a>	<a href="#">Deployer</a>	<a href="#">Wiki</a>	<a href="#">Thanks</a>	<a href="#">Resources</a>

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2. Click **Manager App**. The Connect to dialog box is displayed.
3. Enter the **User Id** and **Password** that has admin rights and click **OK**. (For user creation in tomcat, see [Tomcat User Administration](#). The Tomcat Web Application Manager window is displayed with the list of all the applications deployed.

**Figure D–21 Tomcat Web Application Manager**

<a href="#">/docs</a>	None specified	Tomcat Documentation	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
<a href="#">/examples</a>	None specified	Servlet and JSP Examples	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
<a href="#">/host-manager</a>	None specified	Tomcat Host Manager Application	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
<a href="#">/manager</a>	None specified	Tomcat Manager Application	true	1	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes

**Deploy**

Deploy directory or WAR file located on server

Context Path (required):

XML Configuration file URL:

WAR or Directory URL:

---

WAR file to deploy

Select WAR file to upload

---

**Diagnostics**

Check to see if a web application has caused a memory leak on stop, reload or undeploy

This diagnostic check will trigger a full garbage collection. Use it with extreme caution on production systems.

---

**Server Information**

Tomcat Version	JVM Version	JVM Vendor	OS Name	OS Version	OS Architecture	Hostname	IP Address
Apache Tomcat/7.0.57	1.6.0_45-b06	Sun Microsystems Inc.	Linux	2.6.39-400.211.1.el6uek.x86_64	amd64	ofs220354.in.oracle.com	10.184.132.1

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4. In the *Deploy* section, enter the **Context Path** provided during the installation as `"/<context-name>"`.
5. Enter the path where the `<context-name>.war` file resides (by default `"$FIC_WEB_HOME/<context-name>.war"`) in the **WAR or Directory URL** field and click **Deploy**.
6. On successful application deployment, a confirmation message is displayed. Start the Tomcat server. See [Starting Infrastructure Services](#) for more details.

---

---

## Starting / Stopping Infrastructure Services

This section details about how to start and stop Infrastructure services. This appendix covers the following topics:

- [Starting Infrastructure Services](#)
- [Stopping Infrastructure Services](#)
- [Cleaning up the environment](#)

### Starting Infrastructure Services

Once the installation of Infrastructure is completed successfully and the post-installation steps are completed, the servers must be started. Log on to each machine and run the `.profile` file. All servers mentioned must be started from the same shell encoding. The following servers mentioned are dependent on each other. It is mandatory to maintain the order in which the servers are started. Allow each of the servers to initialize completely before starting the next server.

1. On the machine in which Infrastructure Application components have been installed, navigate to `$FIC_APP_HOME/common/FICServer/bin` and execute the following command to start the Infrastructure Server.

```
./startofsaai.sh
```

---

---

**Note:** You can also start the Infrastructure Server by executing the command `"nohup ./ startofsaai.sh &"`. Starting the process using "nohup" and "&" will return the command prompt without having to wait till the process completes. However, this command cannot be used when you are starting the server for the first time or starting after changing user password in the configuration database schema.

---

---

2. Start ICC server:

- On the machine in which Infrastructure default Application components have been installed, navigate to `$FIC_HOME/ficapp/icc/bin`
- Execute the command:

```
./iccservice.sh
```

---

---

**Note:** Only Infrastructure Default Application Server would hold ICC component.

---

---

3. Start Back-end Services:

- On the machine on which Infrastructure Database components have been installed, navigate to \$FIC\_DB\_HOME/bin and execute the command to start "Agent server":

```
./agentstartup.sh
```

Or

- Start Back-end services using the command:

```
nohup ./agentstartup.sh &
```

---



---

**Note:** This agent internally starts the Router, Message Server, OLAP data server and AM services:

---



---

## Starting Web Application Servers

Start the Web application server depending on the type from the following table.

**Table E-1 Webserver start up options**

Start up Option	Description
Starting WebSphere profile	On the machine in which Web sphere is installed, navigate to [Webshpere_Install_Directory] /AppServer/<profiles>/<profile name>/bin and execute the command: ./startServer.sh server1
Starting WebLogic Domain	On the machine in which WebLogic is installed, navigate to <WebLogic Installation directory>/user_projects/domains/<domain name>/bin and execute the command: startWebLogic.sh -d64  <b>Note:</b> If WebLogic is already running, access the <i>WebLogic Admin Console</i> . Stop and start the application <context name>.ear
Starting Tomcat Application	On the machine in which Tomcat is installed, navigate to <Tomcat_Install_ Directory>/bin and execute the command: ./catalina.sh run

## Stopping Infrastructure Services

To stop Infrastructure services, follow these steps:

1. On the machine in which Infrastructure Application components have been installed, navigate to \$FIC\_APP\_HOME/common/FICServer/bin and execute the command:

```
./stopofsaai.sh
```

2. To stop ICC server, on the machine in which Infrastructure default Application components have been installed, navigate to \$FIC\_HOME/ficapp/icc/bin and execute the command:

```
./iccserversshutdown.sh
```

---



---

**Note:** Only Infrastructure Default Application Server would hold ICC component.

---



---

3. To stop Back-end server, on the machine in which Infrastructure database components have been installed, navigate to `$FIC_DB_HOME/bin` and execute the command:

```
./agentshutdown.sh
```

## Cleaning up the environment

To clean up the environment, follow these steps:

1. Navigate to `$FIC_HOME`
2. Execute `./Uninstall.sh`.
3. When prompted, enter OFSAAI configuration schema password.
4. This will delete `$FIC_HOME` and drop all the objects from configuration schema
5. Navigate to ftpshare folder.
6. Delete the infodom folders `$ rm -rf <INFODOM>`.
7. Drop configuration and atomic schemas from the database



---

---

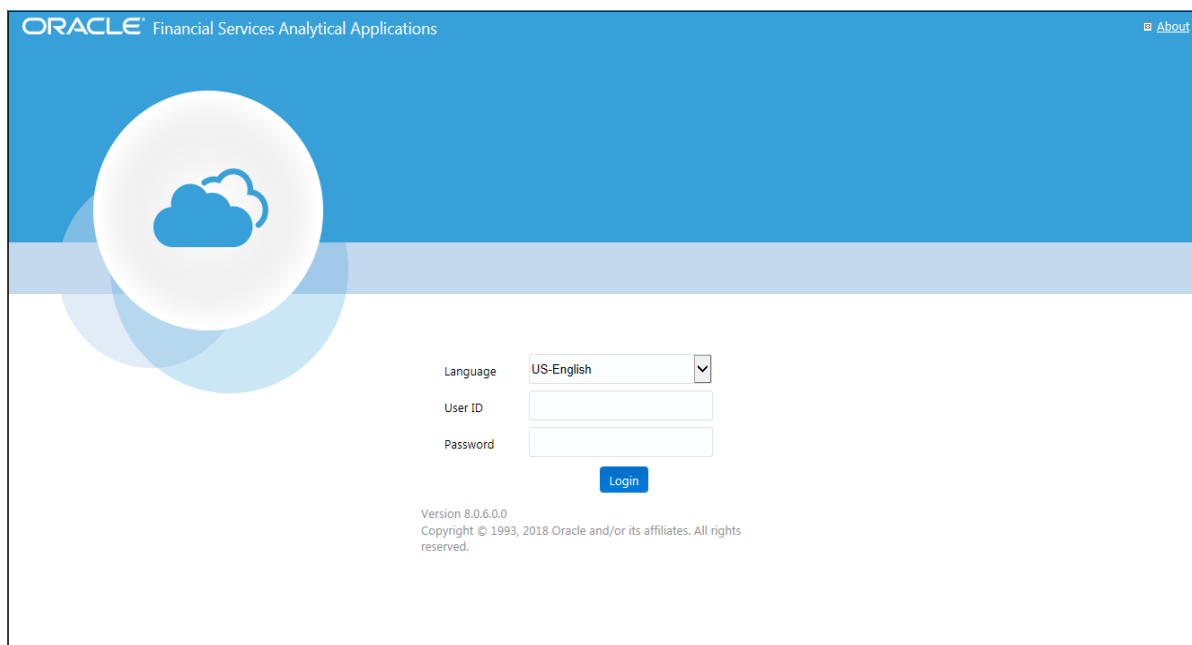
## Accessing OFSAA Application

This section gives details the steps to be performed to access OFSAA Application.

### Access the OFSAA Application

1. From your desktop, open the browser and enter the URL in the following format:  
<scheme>://<IP address/ hostname>:<port>/<context-name>/login.jsp  
For example, <https://111.222.333.444:5555/ofsaa/login.jsp>  
The OFSAA login screen is displayed.

**Figure F–1** OFSAA Login Window



2. With installation of every OFSAA Applications Pack, there are two seeded user profiles configured in the system:  
"SYSADMN - System Administrator  
"SYSAUTH - System Authorizer

---

---

**Note:** For SYSADMIN and SYSAUTH, the default password is password0.

---

---

1. Login to the application using the "SYSADMIN" User ID. (Note that, there is no "I" in the SYSADMIN login USER ID). Enter the password that was provided during installation. On the first login, you will be prompted to change the password.



---

---

## Cloning OFSAA Instance

There is a consistent need for a faster and effective approach of replicating an existing OFSAA instance for further project developments, that is, setting up OFSAA instances that are exact copies of the current OFSAA instance. For more information on cloning, see [OFSAA Cloning Reference Guide](#).



---

---

# OFSAA Landing Page

This section includes the following topics:

- [OFSAA Landing Page](#)
- [Enabling a Product within an Applications Pack](#)

## OFSAA Landing Page

On successful authentication, the OFSAA Landing Page is displayed. This is a common landing page for all users until a preferred application landing page is set by the user in his preferences.

The landing page includes multiple tabs and each tab has specific links to OFSAA Infrastructure and/or Application modules. The tabs and links are displayed based on the OFSAA Application accessed and the access roles mapped to the logged in user.

Each tab contains LHS Menu and RHS Menu. The LHS Menu holds link(s) to modules in a tree structure. The RHS Menu holds link(s) to modules in a navigational panel format.

The following tabs are available in the Landing Page:

- [Applications Tab](#)
- [Sandbox Tab](#)
- [Object Administration Tab](#)
- [System Configuration and Identity Management Tab](#)

### Applications Tab

This tab lists the various OFSAA Applications that are installed in the setup.

The "<Select Application>" dropdown lists the OFSAA Applications based on the user logged in and User Group(s) mapped to OFSAA Application. Selecting an Application from the drop down refreshes the menus/ links.

### Sandbox Tab

This tab lists the various OFSAA Sandboxes created in the setup.

The "<Select Sandbox>" dropdown lists the OFSAA Sandboxes based on the user logged in and User Group(s) mapped to OFSAA Application.

Selecting a Sandbox from the drop down would refresh the menus/ links.

## Object Administration Tab

This tab lists the various OFSAA Information Domains created in the setup.

The "<Select Information Domain>" dropdown lists the OFSAA Information Domains based on the user logged in and User Group(s) mapped to OFSAA Application.

Selecting an Information Domain from the drop down refreshes the menus/ links.

## System Configuration and Identity Management Tab

This tab lists the OFSAA Infrastructure System Configuration and Identity Management modules. These modules work across Applications/ Information Domains and hence there are no Application/ Information Domain dropdown list in this tab.

---

---

**Note:** NOTE: See the AAI User Guide for more details on how to operate on each tab.

---

---

## Enabling a Product within an Applications Pack

You can also enable a product/ application within an Applications Pack post installation at any point of time.

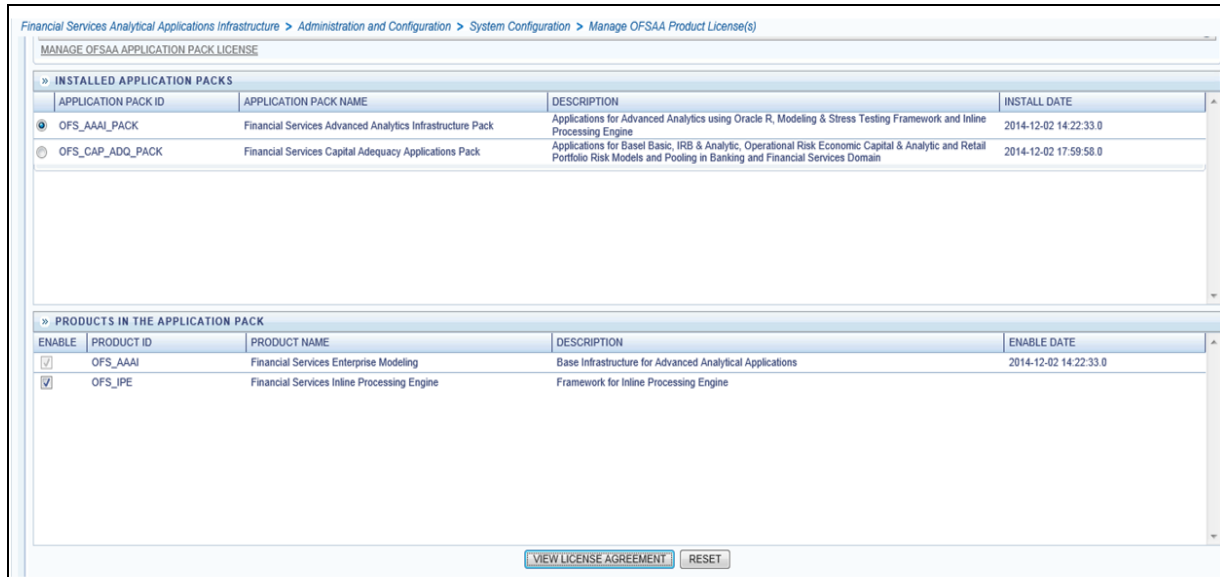
To enable a product through the application UI, follow these steps:

1. Login to the application as SYSADMIN user or any user with System Administrator privileges.
2. Navigate to System Configurations & Identity Management tab and expand Financial Services Analytical Applications Infrastructure >> Administration and Configuration >> System Configuration.
3. Click Manage OFSAA Product License(s)
4. The Manage OFSAA Product License(s) page is displayed as below.

This page includes the following sections:

- INSTALLED Applications Packs
- PRODUCTS IN THE Applications Pack

**Figure H–1 Manage OFSAA Product License(s) Page**



5. The following fields are displayed in the INSTALLED Applications PackS section:

**Table H–1 Installed Applications Pack - Field Description**

Field	Description
Applications Pack ID	Displays a unique Applications Pack ID related to the Applications Pack.  Select the appropriate Pack id using the radio button. The Products in the Applications Pack will be displayed below in the PRODUCTS IN THE Applications PackS section.
Applications Pack Name	Displays the name of the Applications Pack.
Description	Displays the description of the Applications Pack.
Install Date	Displays the date when the Applications Pack was installed.

6. The following fields are displayed in the PRODUCTS IN THE Applications Pack section:

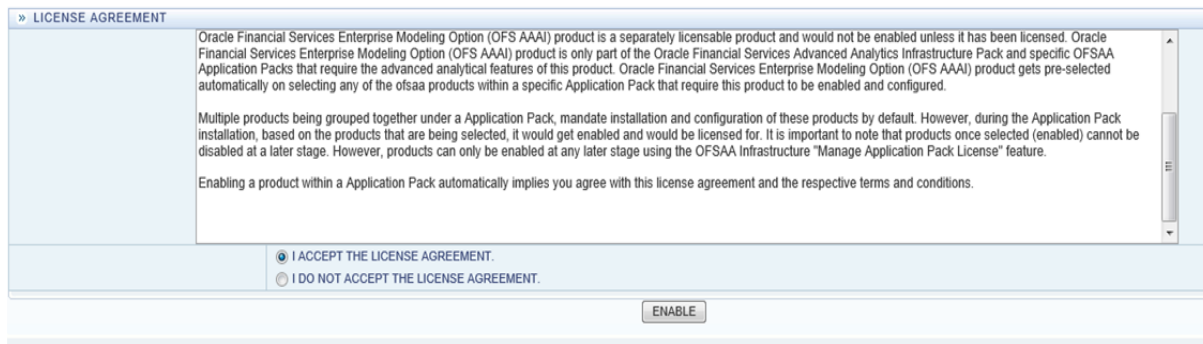
**Table H–2 products in the Applications Pack - Field Description**

Field	Description
Enable	Select the check box to enable a product within an Applications Pack.
Product ID	Displays a unique product id for the product.
Product Name	Displays the name of the Product.
Description	Displays the description of the product.
Enable Date	Displays the date when the product was enabled.

7. Select an Applications Pack by clicking the radio button next to the Applications Pack ID field.

8. Selecting an Applications Pack will display below the products within the Applications Pack.
9. Products which were enabled at the time of installation will have the check box “ENABLE” disabled. You can enable any product within the selected Applications Pack by clicking the “ENABLE” check box against the respective Product ID.
10. Click on RESET button to cancel the operation and refresh the screen.
11. Click VIEW LICENSE AGREEMENT button.  
The License Agreement section is displayed.

**Figure H–2 License Agreement**



12. Select the option I ACCEPT THE LICENSE AGREEMENT.
13. Click ENABLE.
14. An appropriate pop-up message confirmation is displayed showing that the product is enabled for the pack.

---

**Note:** To use the newly enabled product, you need to map your application users to the appropriate product specific User\_Group(s) and subsequently, authorize the actions by logging in as System Authorizer.

---

**Note:**

- For more information see Mapping/Unmapping Users section in the [Oracle Financial Services Analytical Applications Infrastructure User Guide](#).
  - To identify the newly enabled product specific UserGroups/ Applications Pack specific User\_Groups, see the respective Applications Pack specific Installation and Configuration Guide/ User Manual.
-

---

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# Additional Configuration

This section gives detailed information about the Additional Configuration regarding OFSAA Installation.

## Additional Configuration

This section covers the following topics:

- [Configuring FTP/SFTP](#)
- [Configuring Infrastructure Server Memory](#)
- [Configuring Internet Explorer Settings](#)
- [Setting OLAP Data Server Configuration](#)
- [Changing IP/ Hostname, Ports, Deployed Paths of the OFSAA Instance](#)
- [Executing OFSAAI Setup Information Fetching Tool](#)
- [Executing Encryption Changer](#)
- [Setting Infrastructure LDAP Configuration](#)
- [Configure Message Details in Forms Designer](#)
- [Clearing Application Cache](#)
- [Configuring Password Changes](#)
- [Configuring Internal Service \(Document Upload/ Download\)](#)

## Configuring FTP/SFTP

This section details about the configurations required for FTP/SFTP.

### Adding FTP/SFTP Configuration for File Transfer

In OFSAA, certain modules require transfer of files from the web application server to the OFSAA server over SSH.

Follow these steps to ensure the OFSAA server recognizes the web application server during file transfers.

1. Log in to the web application server.
2. Type `sftp <user>@<OFSAA Server>`.
3. Specify **Yes** when prompted for permission.

*Are you sure you want to continue connecting (Yes/No)?*

This will add an entry into the "known\_hosts" file.

4. A confirmation message is displayed:

*Permanently added <OFSAA Server> RSA) to the list of known hosts.*

### Setting Up SFTP Private Key

Log in to OFSAA Unix user using Putty tool, where you plan for installation and generate a pair of authentication keys using the `ssh-keygen` command. If required, set passphrase. Otherwise OFSAAI\_SFTP\_PASSPHRASE tag in the OFSAAI\_InstallConfig.xml file should be set to NA.

To generate private key, enter the commands as shown:

```
ofsaapp@OFSASERVER:~> ssh-keygen -t rsa
Generating public/private rsa key pair.
Enter file in which to save the key (/home/ofsaapp/.ssh/id_rsa):
Created directory '/home/ofsaapp/.ssh'.
Enter passphrase (empty for no passphrase):
Enter same passphrase again:
Your identification has been saved in /home/ofsaapp/.ssh/id_rsa.
Your public key has been saved in /home/ofsaapp/.ssh/id_rsa.pub.
The key fingerprint is:
3e:4f:05:79:3a:9f:96:7c:3b:ad:e9:58:37:bc:37:e4
ofsaapp@OFSASERVER:~> cat /home/ofsaapp/.ssh/id_rsa.pub >>
/home/ofsaapp/.ssh/authorized_keys
```

In case, you are generating SFTP Private key for Hive server, append the content of `/home/ofsaapp/.ssh/id_rsa.pub` to Hiveserver `authorized_keys` file located at `$HOME_DIR_HIVE/.ssh` folder.

Ensure the following permissions exist for the given folders:

- Permission of `.ssh` should be 700
- Permission of `.ssh/authorized_keys` should be 640
- Permission of `.ssh/id_rsa` should be 400
- Permission of Unix user created should be 755

## Configuring Infrastructure Server Memory

The memory settings for Infrastructure Application Server, Tomcat, WebSphere, and WebLogic can be edited for customizing memory settings and garbage collector settings depending on the available hardware configuration as explained below. These settings are base minimum and has to be incremented considering the deployment metrics into account. The increments are usually handled in multiples of 128 MB for heap and 64 MB for stack.

### Configuring Infrastructure Application Server Memory Settings

You can configure the Infrastructure Application Memory settings as follows:

1. Locate `.profile` file.



2. Edit `X_ARGS` field in this file for customizing memory settings and garbage collector settings depends on the hardware configuration.

This has a default value `X_ARGS="-Xms200m"`

```
X_ARGS=" "$X_ARGS" $DELIM -Xmx2048m"
```

---

**Note:** This parameter is modified in 7.3.2 IR and you need to modify `X_ARGS_APP` variable in the `.profile` file to customize Java Memory Settings for Model Upload based on the Data Model size.

For Run and Rule executions, the following value is recommended:

```
X_ARGS_RNEXE="-Xms1g -Xmx1g -XX:+UseAdaptiveSizePolicy
-XX:MaxPermSize=512M -XX:+UseParallelOldGC
-XX:+DisableExplicitGC"
```

```
X_ARGS_RLEXE="-Xms1g -Xmx1g -XX:+UseAdaptiveSizePolicy
-XX:MaxPermSize=512M -XX:+UseParallelOldGC
-XX:+DisableExplicitGC"
```

---

## Configuring Internet Explorer Settings

---

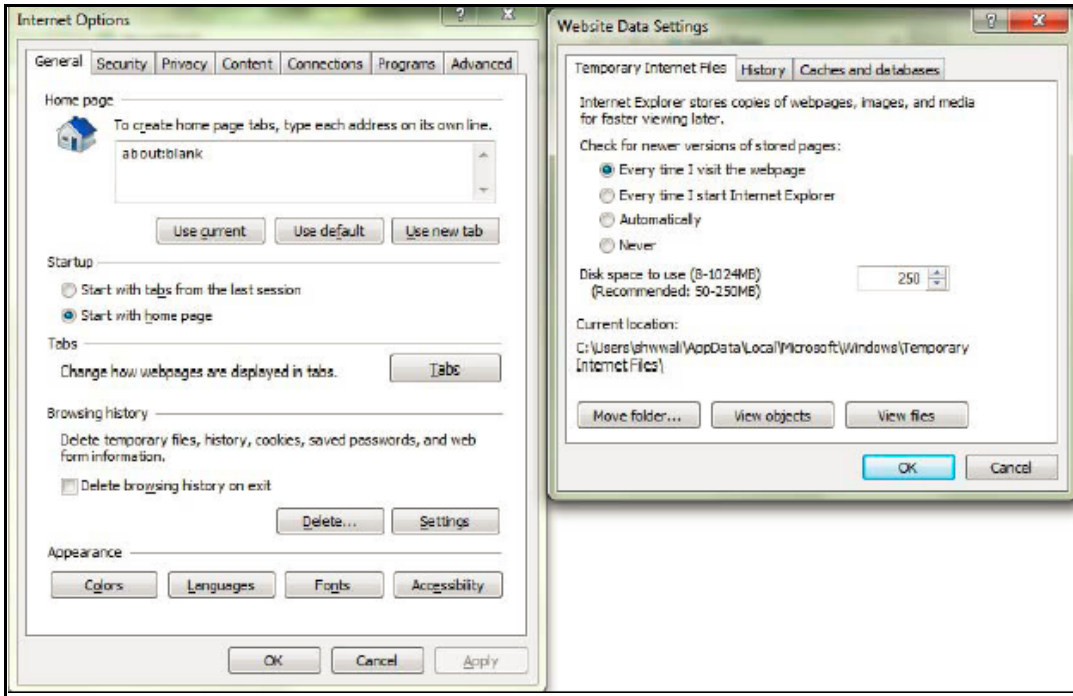
**Note:** OFSAAI supports only default zoom setting in Internet Explorer, that is, 100%.  
Cookies should be enabled.

---

The following browser settings must be specified at every client machine prior to accessing the Infrastructure application.

1. Open **Internet Explorer**. Select **Tools > Internet Options**. The *Internet Options* window is displayed.
2. Click **Settings**. The *Settings* window is displayed.
3. Select **Every time I Visit the webpage** and click **OK**.

**Figure I-1 Internet Options**



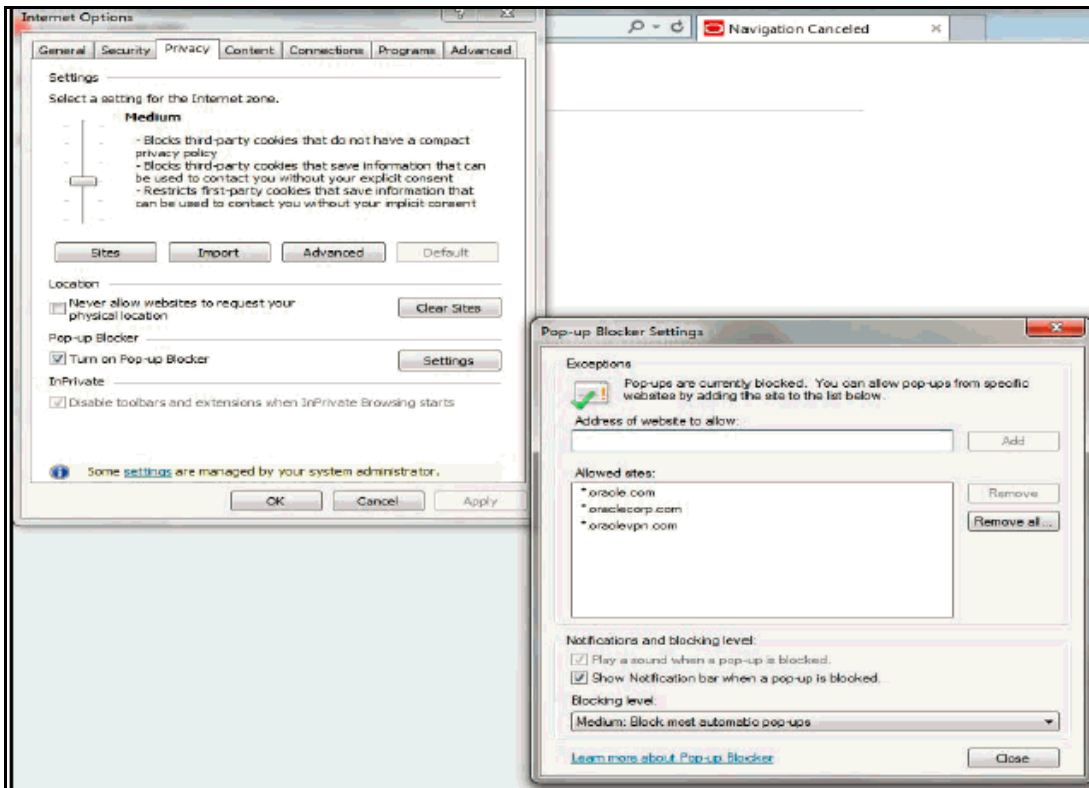
4. In the *Internet Options* window, select the **Security** tab and select the **Internet option** under **Select a zone to view or change the security settings**.
5. Click **Default Level** under **Security level for this zone**.

Figure I-2 Internet Options - Security Tab



6. Click **Apply** to save.
7. Click **Internet Explorer >> Tools >> Compatibility View Settings**.
8. Enter the OFSAA setup URL in the **Add this website** field.
9. Click **Add**.
10. Ensure the URL is listed under **Websites you've added to Compatibility View**.
11. In the *Internet Options* window, select the **Privacy** tab and select the **Turn on Pop-up Blocker** option under **Pop-up Blocker** settings.

Figure I-3 Internet Options- Popup Blocker Settings



12. Click **Settings**. The Pop-up Blocker Settings window is displayed.
13. Enter the URL of the OFSAA Application in the **Address of website to allow:** field.
14. Click **Add**. The OFSAA URL is displayed in the **Allowed sites** section.
15. Click **Close**.
16. Click **OK** in the Internet Options window.

## Retrieving Patch Information

To identify the list of patches installed on your OFSAA setup, follow these steps:

1. Login to the OFSAA application as a user with Object AdminAdvanced Role.
2. Navigate to Object Administration tab.
3. Click System Utilities.
4. Click Patch Information.
5. The page displays the list of patches installed on the OFSAA setup across Applications/ Platform.

## Setting OLAP Data Server Configuration

This section is applicable if you are using the OLAP feature of OFSAAI.

The following parameters must be set to ensure that the system limitations are not exceeded at any stage. The values for these OS parameters should be specified based on the expected load at each implementation site.

For example:

Process Memory Limit

Max Thread Stack Size

Max Number of Threads per Process

- **Sort Buffer settings:** This must be set at the Essbase application level appropriate to the anticipated load.
- **Shutdown and Restart:** During shutdown of OFSAAI Server that has an instance of Data Services that is communicating with an OLAP Data Server, it is imperative to ensure that the cleanup of the old instance is completed on the OLAP Data Server before restarting the OFSAAI Server. Pause for a period of time based on the load the system was subjected to, before restarting the Data Services subsystem.

## Changing IP/ Hostname, Ports, Deployed Paths of the OFSAA Instance

For information on this section, see OFS Analytical Applications Infrastructure Administration User Guide in [OTN](#).

## Executing OFSAAI Setup Information Fetching Tool

Executing the `SetupInfo.jar` file available in the `FIC_HOME` path will help you retrieve the related information about the OFSAAI Set up such as Operating System Name and Version, Database Type and Version, OFSAAI architecture, Log file locations and so on.

To execute "`SetupInfo.jar`" in console, follow these steps:

1. Navigate to the path `$FIC_HOME`.
2. Enter the command:

```
java -jar SetupInfo.jar
```

After execution, the output file location is displayed in the console.

## Executing Encryption Changer

For more information on Encryption Changer, see *Key Management* section in *OFSAAI Administration Guide*.

## Setting Infrastructure LDAP Configuration

For more information on LDAP configuration, see [OFSAAI Administration Guide](#).

## Enabling Parallel Execution of DML statements

A configuration file, `OracleDB.conf` has been introduced to accommodate any configurable parameter related to operations on oracle database. If you do not want to set a parameter to a specific value, then the respective parameter entry can be removed/commented off from the `OracleDB.conf` file which resides in the path `$FIC_DB_HOME/conf`.

As of now, the `OracleDB.conf` file has only one parameter namely `CNF_DEGREE_OF_PARALLELISM`. This parameter indicates the degree of parallelism to be used for a DML operation if parallel DML is explicitly enabled in the session with the `ENABLE PARALLEL DML` clause of the `ALTER SESSION` statement. The default mode of a

session is DISABLE PARALLEL DML. If CNF\_DEGREE\_OF\_PARALLELISM is not set, then the default degree, as decided by Oracle will be used.

## Configure Message Details in Forms Designer

You can configure the Message Details in Forms Designer under Data Entry Forms and Queries module by updating the details of mail server in the NotificationConfig.cfg file which resides in the path \$FIC\_APP\_HOME/common/FICServer/conf.

Ensure that the "authorized User details" for whom you need to configure the Message details are included in *Administration > Security Management > User Administrator > User Maintenance* window.

Update the following parameters in the "NotificationConfig.cfg" file:

**Table I-1 NotificationConfig.cfg File**

Parameter	Description
SMTP_SERVER_IP	Specify the hostname or IP address of SMTP Server.
SMTP_DEBUG_MODE	To run SMTP service in Debug mode, set value to 'true', otherwise set value to 'false'.
SMTP_AUTHORIZATION	Set to 'true' if SMTP server requires the client to be authenticated, otherwise set to 'false'.
SMTP_USERNAME	Username required for logging into SMTP server, if authentication is not required use a dummy value.
SMTP_PASSWORD	Password required for logging into SMTP server, if authentication is not required use a dummy value.
SMTP_MAILID	If the Messages has to go from a Particular ID that ID need to be added. Exchange server forces you set a valid ID that is there in the exchange server. (Based on Security settings)

Ensure that the authorized User details are included in *Administration > Security Management > User Administrator > User Maintenance* window.

## Clearing Application Cache

This is applicable to all Web servers (that is, WebSphere, WebLogic, and Tomcat).

Prior to the deployment of Infrastructure or Application Service Packs / One-off patches, clear the cache. Navigate to the following path depending on the WebServer configured and delete the files:

- **Tomcat:** <Tomcat installation folder>/work/Catalina/localhost/<Application name>/org/apache/jsp
- **WebLogic:** <WebLogic installation location>/domains/<Domain name>/servers/<Server name>/tmp/\_WL\_user/<Application name>/qaelce/jsp\_servlet
- **WebSphere:** <WebSphere installation directory>/AppServer/profiles/<Profile name>/temp/<Node name>/server1/<Application name>/<.war file name>

## Configuring Password Changes

This section explains about how to modify the OFSAA Infrastructure Config Schema and Atomic Schema passwords.

### Modifying OFSAA Infrastructure Config Schema password

To change the Config Schema password, perform the following steps:

1. Change the Config schema User Password in the database.
2. Delete the `$FIC_HOME/conf/Reveleus.SEC` file.
3. Shutdown the OFSAAI App service:
 

```
cd $FIC_APP_HOME/common/FICServer/bin
./stopofsaai.sh
```
4. Start the Infrastructure Server in foreground directly on the server or through X-Windows software using the command:
 

```
./startofsaai.sh
```
5. At the prompt, enter System Password. Enter the "new Config schema" password. The service will start and initialize itself if it is able to successfully connect to the DB.
6. Post successful startup of the service, if required, the Infrastructure server may be shut down and restarted in the background using nohup mode.

### Modifying OFSAA Infrastructure Atomic Schema password

To change the Atomic Schema password, perform the following steps:

1. Change the Atomic schema User Password in the database.
2. Login to the application from the browser using SYSADMN account or any user id, which has System Administrator role mapped.
3. Navigate to *System Configuration > Database Details* window. Select the appropriate connection and edit the password.
4. Navigate to *Data Management Tools > Data Sources > Source Designer* window. Update the password of the appropriate Source
5. If you are using Apache Tomcat as Web server, update the `<Context>` `->` `Resource` tag details in `Server.xml` file from the `$CATALINA_HOME/conf` folder. (In case of Tomcat only Atomic `<Resource>` will exist).

If you are using WebSphere as Web server:

- a. Login to the WebSphere Administration Console, from the left side menu.
- b. Navigate to *Resources > JDBC > Data Sources*. A list of data sources will be populated on the right side.
- c. Select the appropriate Data Source and edit the connection details. (In this case, both Config and Atomic data sources will need to be modified).

If you are using WebLogic as Web server:

- a. Login to the WebLogic Administration Console, from the left side menu
- b. Under Domain Structure list box, expand the appropriate Domain and navigate to *Services > JDBC > Data Sources*. A list of data sources will be populated on the right side.

- c. Select the appropriate Data Source and edit the connection details. (In this case, both Config and Atomic data sources need to be modified).
6. Restart the OFSAAI services.

## Configuring Internal Service (Document Upload/ Download)

This step can be ignored if it has already been configured as part of any previous IR /ML installation.

The Document Upload /Download feature has undergone a change and can now be configured to use Internal service for document upload / download instead of the earlier ExeWebService.

To facilitate Internal service for document upload/ download, perform the following configurations:

1. Create the folders **download**, **upload**, **TempDocument** and **Temp** in the local path of Web application server and provide **Read/Write** permission.
  - To find the exact location, execute the following query in CONFIG schema:  

```
select localpath from web_server_info
```
  - To create folders with Read/Write permission, execute the command:  

```
mkdir -m 777 download upload TempDocument Temp
```
2. Create **DocStorage** folder in the FTPSHARE location of APP tier and provide **Read/Write** permission.
  - To find the exact location, execute the query in CONFIG schema:  

```
select ftpdrive from app_server_info
```
  - To create folder with Read/Write permission, execute the command:  

```
mkdir -m 777 DocStorage
```



---

---

## Patching OFSAA Infrastructure Installation

Oracle strongly recommends installing the latest available patchset so as to be up to date with the various releases of the OFSAA product.

See <http://support.oracle.com> for more information on latest release.



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## Grants for Atomic/ Config Schema

This section mentions about the various grants required for the CONFIG, ATOMIC schemas.

This section discusses the following sections:

- [Configuring Grants for Atomic Schema](#)
- [Configuring Grants for Config Schema](#)
- [Configuring Grants for Config Schema Entities for Atomic Users](#)

### Configuring Grants for Atomic Schema

Atomic Schema creation requires certain grants for object creation. This can be located in `$FIC_HOME/privileges_atomic_user.sql` file.

The following are the Grants for Atomic Schema:

```
grant create SESSION to &database_username
/
grant create PROCEDURE to &database_username
/
grant create SEQUENCE to &database_username
/
grant create TABLE to &database_username
/
grant create TRIGGER to &database_username
/
grant create VIEW to &database_username
/
grant create MATERIALIZED VIEW to &database_username
/
grant select on SYS.V_$PARAMETER to &database_username
/
grant create SYNONYM to &database_username
/
```

---

---

**Note:** If you intend to use Oracle OLAP feature, execute the below grant on all ATOMIC schema(s) `grant olap_user to &database_username`

---

---

## Configuring Grants for Config Schema

Config Schema creation requires certain grants for object creation. This can be located in `$FIC_HOME/privileges_config_user.sql` file.

The following are the Grants for Config Schema:

```
grant create SESSION to &database_username
/
grant create PROCEDURE to &database_username
/
grant create SEQUENCE to &database_username
/
grant create TABLE to &database_username
/
grant create TRIGGER to &database_username
/
grant create VIEW to &database_username
/
grant create MATERIALIZED VIEW to &database_username
/
grant select on SYS.V_$PARAMETER to &database_username
/
grant create SYNONYM to &database_username
/
```

## Configuring Grants for Config Schema Entities for Atomic Users

Atomic Schema creation requires certain grants for config schema object access. This can be located in `$FIC_HOME/config_table_privileges_for_atomic_user.sql` file.

## Configuring Applications Pack XML Files

This section explains configuration of `OFS_ECM_PACK.xml` and `OFS_ECM_SCHEMA_IN.xml` files.

This section includes the following topics:

- [Configuring OFS\\_ECM\\_PACK.xml File](#)
- [Configuring OFS\\_ECM\\_SCHEMA\\_IN.xml File](#)

### Configuring OFS\_ECM\_PACK.xml File

The `OFS_ECM_PACK.xml` file holds details on the various OFSAA products that are packaged in a particular Applications Pack.

The following table gives details about the various tags/ parameters available in the file and the values that need to be updated. Prior to installing the OFSAA Applications Pack in Silent mode, it is mandatory to update this file.

**Table L-1 OFS\_ECM\_PACK.XML Parameters**

Tag Name/ Attribute Name	Description	Mandatory (Y/N)	Default Value/ Permissible Value	Comments
APP_PACK_ID	Unique Applications Pack Identifier	Y	Unique Seeded Value	DO NOT modify this value.
APP_PACK_NAME	Unique Applications Pack Name	Y	Unique Seeded Value	DO NOT modify this value.
APP_PACK_DESCRIPTION	Unique Applications Pack Description	Y	Unique Seeded Value	DO NOT modify this value.
VERSION	Unique Application Pack release version	Y	Unique Seeded Value	DO NOT modify this value.
APP	Unique Application Entries	Y	Unique Seeded Value	DO NOT remove these tags.
APP_ID	Unique Application Identifier	Y	Unique Seeded Value	DO NOT modify this value.

Table L-1 OFS\_ECM\_PACK.XML Parameters

Tag Name/ Attribute Name	Description	Mandatory (Y/N)	Default Value/ Permissible Value	Comments
APP_ID/ PREREQ	Prerequisite Application/ Product	Y	Unique Seeded Value	For most applications Infrastructure would be the prerequisite set. For certain other applications, an appropriate Application ID would be set.  DO NOT modify this value.
APP_ID/ DEF_SEL_FLAG	Default Selected Flag	Y	Default - YES	In all Applications Packs, Infrastructure would have this value set to "YES". DO NOT modify this value.
APP_ID/ ENABLE	Enable Application/ Product	YES if installing in Silent mode.	Default - YES for Infrastructure NO for Others  Permissible - YES or NO	Set this attribute-value to YES against every APP_ID which is licensed and should be enabled for use.  <b>Note:</b> Application/ Product once enabled cannot be disabled. However, Application/ Product not enabled during installation can be enabled later through the Administration UI.
APP_NAME	Unique Application/ Product Name	Y	Unique Seeded Value	DO NOT modify this value.
APP_DESCRIPTION	Unique Application/ Product Name	Y	Unique Seeded Value	DO NOT modify this value.
VERSION	Unique release version	Y	Unique Seeded Value	DO NOT modify this value.

## Configuring OFS\_ECM\_SCHEMA\_IN.xml File

Creating database schemas, objects within schemas and assigning appropriate grants are the primary steps in the installation process of OFSAA Applications. The OFS\_ECM\_SCHEMA\_IN.xml file contains details on the various application schemas that should be created prior to the Applications Pack installation.

The following table gives details about the various tags/ parameters available in the file and the values that need to be updated. Prior to executing the schema creator utility, it is mandatory to update this file.

Table L-2 OFS\_ECM\_SCHEMA\_IN.XML Parameters

Tag Name/ Attribute Name	Description	Mandato ry (Y/N)	Default Value/ Permissible Value	Comments
APP_PACK_ID	Unique Applications Pack Identifier	Y	Unique Seeded Value	DO NOT modify this value.
<JDBC_URL>	Enter the JDBC URL  <b>Note:</b> You can enter RAC and NON-RAC enabled database connectivity URL.	Y	Example,  jdbc:oracle:thin:@<DBSERVER IP/HOST>:<PORT>:<SID> >  or  jdbc:oracle:thin:@//[HOST][:PORT]/SERVICE  or  jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=TCP)(HOST=[HOST])(port=[PORT])))(ADDRESS=(PROTOCOL=TCP)(HOST=[HOST])(PORT=[PORT]))(LOAD_BALANCE=yes)(FAILOVER=yes))(CONNECT_DATA=(SERVICE_NAME=[SERVICE])))  For example, jdbc:oracle:thin:@//dbhost.server.com:1521/service1  or  jdbc:oracle:thin:@//dbhost.server.com:1521/scan-1  or  jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=TCP)(HOST=dbhost1.server.com)(port=1521)))(ADDRESS=(PROTOCOL=TCP)(HOST=dbhost2.server.com)(PORT=1521))(LOAD_BALANCE=yes)(FAILOVER=yes))(CONNECT_DATA=(SERVICE_NAME=service1)))	Ensure to add an entry (with SID/ SERVICE NAME) in the tnsnames.ora file on the OFSAA server. The entry should match with the SID/SERVICE NAME used in the JDBC URL.
<JDBC_DRIVER>	By default this driver name is seeded.  <b>Note:</b> Do not edit this attribute value.	Y	Example,  oracle.jdbc.driver.OracleDriver	Only JDBC Thin Driver is supported.  DO NOT modify this value.
<HOST>	Enter the Hostname/ IP Address of the system on which you are installing the OFSAA components.	Y	Host Name/ IP Address	

Table L-2 OFS\_ECM\_SCHEMA\_IN.XML Parameters

Tag Name/ Attribute Name	Description	Mandatory (Y/N)	Default Value/ Permissible Value	Comments
<SETUPINFO>/ NAME	Enter the acronym for the type of implementation. This information will be displayed in the OFSAA Home Page.  Note: On executing the schema creator utility, this value will be prefixed with each schema name. For example: dev_ofsaconf, uat_ofsaatm.	Y	Accepts strings with a minimum length of two and maximum of four.  Example, DEV, SIT, PROD	This name would appear in the OFSAA Landing Page as "Connected To: xxxx"  The schemas being created would get this prefix. For E.g. dev_ofsaconf, uat_ofsaconf etc.
<SETUPINFO>/ PREFIX_ SCHEMA_ NAME	Identifies if the value specified in <SETUPINFO>/NAME attribute should be prefixed to the schema name.	N	YES or NO	Default value is YES.
<PASSWORD>/ DEFAULT*	Enter the password if you want to set a default password for all schemas.  Note: You also need to set APPLYSAMEFORALL attribute as Y to apply the default password for all the schemas.	N	The maximum length allowed is 30 characters. Special characters are not allowed.	
<PASSWORD>/ APPLYSAMEFO RALL	Enter as Y if you want to apply the password specified in DEFAULT attribute for all the schemas.  If you enter as N, you need to provide individual passwords for all schemas.  Note: In case you have entered Y in APPLYSAMEFORALL attribute and also have specified individual passwords for all the schemas, then the specified individual passwords will take precedence.	Y	Default - N Permissible - Y or N	If set to N, need to specify PASSWORD value for every SCHEMA.  <b>Note:</b> Setting this attribute value is mandatory, If DEFAULT attribute is set.



Table L-2 OFS\_ECM\_SCHEMA\_IN.XML Parameters

Tag Name/ Attribute Name	Description	Mandatory (Y/N)	Default Value/ Permissible Value	Comments
<SCHEMA>/ TYPE	<p>The different types of schemas that are supported in this release are ATOMIC, CONFIG, SANDBOX, and ADDON.</p> <p>By default, the schemas types are seeded based on the Applications Pack.</p> <p>Note: Do not edit this attribute value.</p>	Y	<p>ATOMIC/CONFIG/SANDBOX/ADDON</p> <p>Note: SANDBOX AND ADDON schemas are not applicable for OFS AAAI Applications Pack.</p>	<p>Only One CONFIG schema can exist in the file.</p> <p>This schema identifies as the CONFIGURATION schema that holds the OFSAA setup details and other metadata information.</p> <p>Multiple ATOMIC/SANDBOX/ ADDON schemas can exist in the file.</p> <p>ATOMIC schema refers to the Information Domain schema. SANDBOX schema refers to the SANDBOX schema. ADDON schema refers to other miscellaneous schema (not applicable for this Applications Pack).</p>

Table L-2 OFS\_ECM\_SCHEMA\_IN.XML Parameters

Tag Name/ Attribute Name	Description	Mandatory (Y/N)	Default Value/ Permissible Value	Comments
<SCHEMA.>/ NAME	<p>By default, the schemas names are seeded based on the Applications Pack.</p> <p>You can edit the schema names if required.</p> <p>Note:</p> <p>The Schema Name will have a prefix of the SETUPINFO/ NAME attribute.</p> <p>SCHEMA NAME must be same for all the ATOMIC Schemas of applications within an Applications Pack.</p>	Y	The permissible length is 15 characters and only alphanumeric characters allowed. No special characters allowed except underscore '_'.	<p>SETUPINFO/ NAME attribute value would be prefixed to the schema name being created.</p> <p>For E.g. if name is set as 'ofsaaatm' and setupinfo as 'uat' then schema being created would be 'uat_ofsaaatm'.</p> <p>NAME should be same where APP_GRP=1 for all SCHEMA tags (Not applicable for this Applications Pack).</p> <p><b>Note:</b></p> <p>For example:</p> <pre>&lt;Variable name="DATABASE NAME"&gt;KYCDB.oracle.com &lt;/Variable&gt;</pre> <p>A TNS entry must be made in tnsnames.ora with tnsname same as the value provided for KYC Database Name. If sqlnet .ora file is configured with a value in NAMES.DEFAULT_DOMAIN then ensure to use the same domain while defining Database Name. It is required for KYC Batch processing.</p> <p>This name should be unique</p> <p>The same above steps to be done for FATCA and CTR.</p> <p>A restart of web and app servers are necessary whenever any changes are done to config schema</p>
<SCHEMA>/ PASSWORD*	<p>Enter the password of the schema to be created.</p> <p>Note:</p> <p>If this attribute is left blank, then the password specified in the &lt;PASSWORD&gt;/DEFAULT attribute is applied as the Schema Password.</p>	N	The maximum length allowed is 30 characters. Special characters are not allowed.	<p>Note: You need to mandatorily enter the password if you have set the &lt;PASSWORD&gt;/APPLYSAMEFORALL attribute as N.</p> <p>Takes precedence over DEFAULT attribute value of &lt;PASSWORD&gt; tag.</p>

Table L-2 OFS\_ECM\_SCHEMA\_IN.XML Parameters

Tag Name/ Attribute Name	Description	Mandat ory (Y/N)	Default Value/ Permissible Value	Comments
<SCHEMA>/ APP_ID	By default, the Application ID is seeded based on the Applications Pack.  Note: Do not edit this attribute value.	Y	Unique Seeded Value	Identifies the Application/ Product for which the schema is being created.  DO NOT modify this value.
<SCHEMA>/ DEFAULTTABL ESPACE	Enter the available default tablespace for DB User.  Note:  If this attribute is left blank, then USERS is set as the default tablespace.	N	Default - USERS  Permissible - Any existing valid tablespace name.	Modify this value to associate any valid tablespace with the schema.
<SCHEMA>/ TEMPTABLESP ACE	Enter the available temporary tablespace for the DB User.  Note:  If this attribute is left blank, then TEMP is set as the default tablespace.	N	Default - TEMP  Permissible - Any existing valid temporary tablespace name.	Modify this value to associate any valid tablespace with the schema.
<SCHEMA>/ QUOTA	Enter the quota to be set on DEFAULTTABLESPACE attribute for the schema/ user. By default, the quota size is set to 500M. Minimum: 500M or Unlimited on default Tablespace	N	Example,  600M/m  20G/g  UNLIMITED/unlimited	Modify this value to grant the specified quota on the mentioned tablespace to the user.
SCHEMA/ INFODOM	Infodom Name Associated with each Atomic Schema and ADDON.	Y	Enter the name of the Information Domain to associate this schema.  The schema creator utility automatically derives an Information Domain Name based on the Applications Pack if no value is specified for this attribute.  Permissible length is 16 characters and only alphanumeric characters allowed. No special characters allowed.	Valid string with up to 11 characters.  Mandatory for Silent Installation Mode
<ADV_SEC_ OPTIONS>	Parent tag to hold Advance Security Options.	N		Uncomment the tag and edit if you want to add security options. For example, TDE and Data Redact.  For details, see the example following the table.

Table L-2 OFS\_ECM\_SCHEMA\_IN.XML Parameters

Tag Name/ Attribute Name	Description	Mandatory (Y/N)	Default Value/ Permissible Value	Comments
<ADV_SEC_OPTIONS>/TDE	Tag to enable/disable TDE.	N	Default is FALSE. To enable TDE, set this to TRUE.	Ensure this tag is not commented if you have uncommented <ADV_SEC_OPTIONS>
<ADV_SEC_OPTIONS>/DATA_REDACT	Tag to enable/disable Data Redaction feature.	N	Default is FALSE. To enable DATA_REDACT, set this to TRUE	Ensure this tag is not commented if you have uncommented <ADV_SEC_OPTIONS>
<TABLESPACE S>	Parent tag to hold <TABLESPACE> elements	N	NA	Uncomment the tag and edit. ONLY if tablespaces are to be created as part of the installation.  For details, see the example following the table.  Note: When TDE is TRUE in ADV_SEC_OPTIONS, then it is mandatory for the <TABLESPACE S> tag to be present in the xml file.
<TABLESPACE >/ NAME	Logical Name of tablespace to be created.	Y		Name if specified should be referred in the <SCHEMA DEFAULTTABLESPACE= "##NAME##"> attribute.  Note the ## syntax.
<TABLESPACE >/ VALUE	Physical Name of the tablespace to be created	Y	NA	Value if specified will be the actual name of the TABLESPACE.
<TABLESPACE >/ DATAFILE	Specifies the location of the data file on the server	Y	NA	Enter the absolute path of the file to be created.
<TABLESPACE >/ AUTOEXTEND	Specifies if the tablespace should be extensible or have a hard limit	Y	ON or OFF	Set to ON to ensure that the tablespace does not run out of space when full.
<TABLESPACE >/ ENCRYPT	Specifies if the tablespace(s) should be encrypted using TDE.	Y	ON or OFF	Set to ON to ensure that the tablespaces when created are encrypted using TDE.

---

**Note:** Encryption of tablespaces requires to enabling Transparent Data Encryption (TDE) on the Database Server.

Example: (The following snippet shows that TDE is enabled and hence the tablespace has been shown with encryption ON.)

```
<ADV_SEC_OPTIONS>
<OPTION NAME="TDE" VALUE="FALSE" />
<OPTION NAME="DATA_REDACT" VALUE="FALSE" />
</ADV_SEC_OPTIONS>
<TABLESPACES>
<TABLESPACE NAME="OFS_ECM_DATA_CM_TBSP" VALUE="DATA_CM_TBSP"
DATAFILE="/scratch/oraofss/app/oradata/Ti26012L64/case_data_
01.dbf" SIZE="512M" AUTOEXTEND="OFF" ENCRYPT="OFF"/>
<TABLESPACE NAME="OFS_ECM_IDX_CM_TBSP" VALUE="IDX_CM_TBSP"
DATAFILE="/scratch/oraofss/app/oradata/Ti26012L64/case_idx_
01.dbf" SIZE="512M" AUTOEXTEND="OFF" ENCRYPT="OFF" />
<TABLESPACE NAME="OFS_COMM_DATA_TBSP" VALUE="COMM_DATA_TBSP"
DATAFILE="/scratch/oraofss/app/oradata/Ti26012L64/comm_data_
01.dbf" SIZE="512M" AUTOEXTEND="OFF" ENCRYPT="OFF"/>
<TABLESPACE NAME="OFS_ECM_DATA_CONF_TBSP" VALUE="DATA_CONF_
TBSP"
DATAFILE="/scratch/oraofss/app/oradata/Ti26012L64/comm_data_
01.dbf" SIZE="1024M" AUTOEXTEND="OFF" ENCRYPT="OFF"/>
</TABLESPACES>
<SCHEMAS>
<SCHEMA TYPE="CONFIG" NAME="ofsaconf" PASSWORD="" APP_
ID="OFS_AAI" DEFAULTTABLESPACE="##OFS_ECM_DATA_CONF_TBSP##"
TEMPTABLESPACE="TEMP" QUOTA="10G" />
<SCHEMA TYPE="ATOMIC" NAME="ofsaecm" PASSWORD="" APP_
ID="OFS_IPE" DEFAULTTABLESPACE="##OFS_ECM_DATA_CM_TBSP##"
TEMPTABLESPACE="TEMP" QUOTA="10G" INFODOM="ECMINFO" />
<SCHEMA TYPE="ATOMIC" NAME="ofsaecm" PASSWORD="" APP_
ID="OFS_NGECM" DEFAULTTABLESPACE="##OFS_ECM_DATA_CM_TBSP##"
TEMPTABLESPACE="TEMP" QUOTA="10G" INFODOM="ECMINFO" />
</SCHEMAS>
```

---



## Configuring OFSAI\_InstallConfig.xml File

This section gives details about the OFSAI\_InstallConfig.xml file.

### Configuring OFSAI\_InstallConfig.xml file

To configure the OFSAI\_InstallConfig.xml file, follow these steps.

1. Navigate to OFS\_AAI\_PACK/OFS\_AAI/conf/ directory.
2. Open the file OFSAI\_InstallConfig.xml in text editor.
3. Configure the OFSAI\_InstallConfig.xml as mentioned in [Table M-1](#):
4. You must manually set the InteractionVariable parameter values as mentioned in the table. If a value is not applicable, enter NA and ensure that the value is not entered as NULL.

**Table M-1 OFSAA Infrastructure Installation Tasks and Descriptions**

InteractionVariable Name	Significance and Expected Value	Mandatory
<code>&lt;Layer name="GENERAL"&gt;</code>		
InteractionGroup name="WebServerType"		
WEBAPPSERVERTYPE	Identifies the web application server on which the OFSAA Infrastructure web components would be deployed. The following numeric value should be set depending on the type: <ul style="list-style-type: none"> <li>• Apache Tomcat = 1</li> <li>• IBM WebSphere Application Server = 2</li> <li>• Oracle WebLogic Server = 3</li> </ul> For example, <code>&lt;InteractionVariable name="WEBAPPSERVERTYPE"&gt;3&lt;/InteractionVariable&gt;</code>	Yes
InteractionGroup name="OFSAA Infrastructure Server Details"		
DBSERVER_IP	Identifies the hostname or IP address of the system on which the Database Engine is hosted. <b>Note:</b> For RAC Database, the value should be NA. For example, <code>&lt;InteractionVariable name="DBSERVER_IP"&gt;14.15.16.17&lt;/InteractionVariable&gt;</code> or <code>&lt;InteractionVariable name="DBSERVER_IP"&gt;dbhost.server.com&lt;/InteractionVariable&gt;</code>	Yes
InteractionGroup name="Database Details"		

**Table M-1 (Cont.) OFSAA Infrastructure Installation Tasks and Descriptions**

InteractionVariable Name	Significance and Expected Value	Mandatory
ORACLE_SID/SERVICE_NAME	Identifies the Oracle DB Instance SID or SERVICE_NAME <b>Note:</b> The Oracle_SID value should be exactly the same as it is mentioned in JDBC_URL. For example, <InteractionVariable name="ORACLE_SID/SERVICE_NAME">ofsaser</InteractionVariable>	Yes
ABS_DRIVER_PATH	Identifies the directory where the JDBC driver (ojdbc<version>.jar) exists. This would typically be the \$ORACLE_HOME/jdbc/lib For example, <InteractionVariable name="ABS_DRIVER_PATH">">/oradata6/revwb7/oracle </InteractionVariable> <b>Note:</b> Refer <a href="#">Appendix O</a> for identifying the correct "ojdbc<version>.jar" version to be copied.	Yes
InteractionGroup name="OLAP Detail"		
OLAP_SERVER_IMPLEMENTATION	Identifies if the OFSAA Infrastructure OLAP component needs to be configured depending on whether you intend to use the OLAP feature. The following numeric value should be set depending on the choice: <ul style="list-style-type: none"> <li>• YES - 1</li> <li>• NO - 0</li> </ul>	No
<b>Note:</b> If value for OLAP_SERVER_IMPLEMENTATION is set to 1, it checks for following environment variables are set in.profile: ARBORPATH, HYPERION_HOME and ESSBASEPATH.		
InteractionGroup name="SFTP Details"		
SFTP_ENABLE	Identifies if the SFTP (Secure File Transfer Protocol) feature is to be enabled. The following numeric value should be set depending on the choice: <ul style="list-style-type: none"> <li>• For SFTP -1.</li> <li>• For FTP - 0</li> </ul>	Yes
<b>Note:</b> The default value for SFTP_ENABLE is 1, which signifies that SFTP will be used. Oracle recommends using SFTP instead of FTP because SFTP is considered more secure. However, a client may choose to ignore this recommendation and to use FTP by setting SFTP_ENABLE to 0. You can change this selection later by using the OFSAAI administration interface. Set SFTP_ENABLE to -1 to configure ftpshare and weblocal path as local path mounted for OFSAAI server.		
FILE_TRANSFER_PORT	Identifies the port used for the file transfer service. The default value specified is 22 (SFTP). Specify default value as 21 (FTP) if SFTP_ENABLE is 0. Alternatively, this value can be any Port configured by System Administrators to support SFTP/FTP. For example, <InteractionVariable name="FILE_TRANSFER_PORT">21</InteractionVariable>	Yes
InteractionGroup name="Locale Detail"		
LOCALE	Identifies the locale information to be used during the installation. This release of the OFSAA Infrastructure supports only US English. For example, <InteractionVariable name="LOCALE">en_US</InteractionVariable>	Yes
InteractionGroup name="OFSAA Infrastructure Communicating ports" <b>Note:</b> The following ports are used internally by the various OFSAA Infrastructure services. The default values mentioned are set in the installation. If you intend to specify a different value, update the parameter value accordingly and ensure this port value is in the range of 1025 to 65535 and the respective port is enabled.		
JAVAPORT	9999	Yes



Table M-1 (Cont.) OFSAA Infrastructure Installation Tasks and Descriptions

InteractionVariable Name	Significance and Expected Value	Mandatory
NATIVEPORT	6666	Yes
AGENTPORT	6510	Yes
ICCPOR	6507	Yes
ICCNATIVEPORT	6509	Yes
OLAPPORT	10101	Yes
MSGPORT	6501	Yes
ROUTERPORT	6500	Yes
AMPORT	6505	Yes
InteractionGroup name="Web Details"		
<b>Note:</b> If value for HTTPS_ENABLE is set to 1, ensure you have a valid certificate available from a trusted CA and the same is configured on your web application server.		
HTTPS_ENABLE	Identifies if the UI should be accessed using HTTP or HTTPS scheme. The default value set is 0. The following numeric value should be set depending on the choice: <ul style="list-style-type: none"> <li>• YES - 1</li> <li>• NO - 0</li> </ul> For example, <InteractionVariable name="HTTPS_ENABLE">0</InteractionVariable>	Yes
WEB_SERVER_IP	Identifies the HTTP Server IP/ Hostname or Web Application Server IP/ Hostname, to be used for accessing the UI. This IP would typically be the HTTP Server IP.  If no separate HTTP Server is available, the value should be Web Application Server IP/Hostname.  For example, <InteractionVariable name="WEB_SERVER_IP">10.11.12.13</InteractionVariable>  or  <InteractionVariable name="WEB_SERVER_IP">myweb.server.com</InteractionVariable>	No
WEB_SERVER_PORT	Identifies the Web Server Port. This would typically be 80 for non SSL and 443 for SSL. If no separate HTTP Server exists, the value should be the port configured for Web Server.  <b>Note:</b> The port value will not be accepted as 80 if HTTPS_ENABLE is 1 and as 443, if HTTPS_ENABLE is 0.  For example, <InteractionVariable name="WEB_SERVER_PORT">80</InteractionVariable>	No
CONTEXT_NAME	Identifies the web application context name which will be used to built the URL to access the OFSAA applications. The context name can be identified from a URL as follows:  <scheme>://<host>:<port>/<context-name>/login.jsp  Sample URL: https://myweb:443/ofsaadev/login.jsp  For example, <InteractionVariable name="CONTEXT_NAME">ofsaadev</InteractionVariable>	Yes

**Table M-1 (Cont.) OFSAA Infrastructure Installation Tasks and Descriptions**

InteractionVariable Name	Significance and Expected Value	Mandatory
WEBAPP_CONTEXT_PATH	<p>Identifies the absolute path of the exploded .ear file on the web application server.</p> <p>For Tomcat, specify the Tomcat directory path till /webapps, such as /oradata6/revwb7/tomcat/webapps/.</p> <p>For WebSphere, enter the WebSphere path as &lt;WebSphere profile directory&gt;/installedApps/ &lt;NodeCellName&gt;. For example, /data2/test//WebSphere/AppServer/profiles/&lt;Profile_Name&gt;/installedApps/aix-imfNode01Cell. Where aix-imf is Host name.</p> <p>For WebLogic, provide the WebLogic home directory path as /&lt;WebLogic home directory path&gt;/bea/wlserver_10.3</p> <p><b>Note:</b> For WebLogic, value specified for this attribute is ignored and value provided against attribute WEBLOGIC_DOMAIN_HOME is considered.</p>	Yes
WEB_LOCAL_PATH	<p>Identifies the absolute path to any directory on the web application server that can hold temporary files being uploaded as part of the applications usage.</p> <p>Note: In case of a clustered deployment, ensure this path and directory is same on all the nodes.</p>	Yes
InteractionGroup name="Weblogic Setup Details"		
WEBLOGIC_DOMAIN_HOME	<p>Identifies the WebLogic Domain Home.</p> <p>For example, &lt;InteractionVariable name="WEBLOGIC_DOMAIN_HOME"&gt;/home/weblogic/bea/user_projects/domains/mydomain&lt;/InteractionVariable&gt;</p>	Yes Specify the value only if WEBSEVERTYPE is set as 3 (WebLogic)
InteractionGroup name="OFSAAI FTP Details"		
OFSAAI_FTPSHARE_PATH	<p>Identifies the absolute path to the directory identified as file system stage area.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>The directory should exist on the same system on which the OFSAA Infrastructure is being installed (can be on a separate mount).</li> <li>The user mentioned in the following APP_SFTP_USER_ID parameter should have RWX permission on the directory.</li> </ul> <p>For example, &lt;InteractionVariable name="APP_FTPSHARE_PATH"&gt;"&gt;/oradata6/revwb7/ftpshare&lt;/InteractionVariable&gt;</p>	Yes
OFSAAI_SFTP_USER_ID	<p>Identifies the user who has RWX permissions on the directory identified under the preceding parameter APP_FTPSHARE_PATH.</p>	Yes
OFSAAI_SFTP_PRIVATE_KEY	<p>Identifies the SFTP private key for OFSAAI.</p> <p>For example,</p> <p>&lt;InteractionVariable name="OFSAAI_SFTP_PRIVATE_KEY"&gt;/home/ofsaapp/.ssh/id_rsa&lt;/InteractionVariable&gt;</p> <p>By default, the value is NA, which indicates password will be prompted for the user &lt;OFSAAI_SFTP_USER_ID&gt; for authentication.</p> <p>For more information on generating SFTP Private key, see the Setting Up SFTP Private Key section.</p>	No

**Table M-1 (Cont.) OFSAA Infrastructure Installation Tasks and Descriptions**

InteractionVariable Name	Significance and Expected Value	Mandatory
OFSAAI_SFTP_PASSPHRASE	<p>Identifies the passphrase for the SFTP private key for OFSAAI.</p> <p>For example,</p> <p>InteractionVariable name="OFSAAI_SFTP_PASSPHRASE"&gt;enter a passphrase here&lt;/InteractionVariable&gt;</p> <p>By default, the value is NA.</p> <p>If OFSAAI_SFTP_PRIVATE_KEY value is given and this is kept as NA, then it is assumed as empty passphrase.</p>	No
<p>InteractionGroup name="Hive Details"</p> <p>The default value set for the interaction variables under this group is set as NA. These are required only for Hive Configuration.</p>		
HIVE_SERVER_PORT	<p>Identifies the port used for the file transfer service. The default value set is 22 (SFTP). Set this value as 21 for FTP.</p> <p>For example,</p> <p>InteractionVariable name="HIVE_SERVER_PORT"&gt;22&lt;/InteractionVariable&gt;</p>	Yes, only for HIVE Configuration
HIVE_SERVER_FTPDRIVE	<p>Identifies the absolute path to the directory identified as file system stage area of HIVE server.</p> <p>For example,</p> <p>InteractionVariable name="HIVE_SERVER_FTPDRIVE"&gt;/scratch/ofsaa/ftpshare&lt;/InteractionVariable&gt;</p>	Yes, only for HIVE Configuration
HIVE_SERVER_FTP_USERID	<p>Identifies the user who has RWX permissions on the directory identified under the preceding parameter HIVE_SERVER_FTPDRIVE.</p> <p>For example,</p> <p>InteractionVariable name="HIVE_SERVER_FTP_USERID"&gt;ofsaa&lt;/InteractionVariable&gt;</p>	Yes, only for HIVE Configuration
HIVE_SERVER_FTP_PROTOCOL	<p>If the HIVE_SERVER_PORT is 21, then set value as FTP, else set it as SFTP.</p> <p>For example,</p> <p>InteractionVariable name="HIVE_SERVER_FTP_PROTOCOL"&gt;SFTP&lt;/InteractionVariable&gt;</p>	Yes, only for HIVE Configuration
HIVE_SFTP_PRIVATE_KEY	<p>Identifies the SFTP private key for the HIVE server.</p> <p>For example,</p> <p>&lt;InteractionVariable name="HIVE_SFTP_PRIVATE_KEY"&gt;/scratch/testuser/.ssh/id_rsa&lt;/InteractionVariable&gt;</p> <p>By default, the value is NA, which indicates password will be prompted for the user &lt;HIVE_SERVER_FTP_USERID&gt; for authentication.</p> <p>For more information on generating SFTP Private key, see the Setting Up SFTP Private Key section.</p>	Yes, only for HIVE Configuration
HIVE_SFTP_PASSPHRASE	<p>Identifies the passphrase for the SFTP private key for HIVE.</p> <p>For example,</p> <p>&lt;InteractionVariable name="HIVE_SFTP_PASSPHRASE"&gt;NA&lt;/InteractionVariable&gt;</p> <p>By default, the value is NA.</p> <p>If HIVE_SFTP_PRIVATE_KEY value is given and this is kept as NA, then it is assumed as empty passphrase.</p>	Yes, only for HIVE Configuration



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## Migrating for Excel Upload Functionality

This section provides detailed instructions to migrate excel upload functionality.

### Prerequisites

The following are the prerequisites for migration.

- "Data model in ATOMIC schemas should be same on the source and target setups
- "OFS AAI (platform) patch level version should be same on the source and target setups.
- "PL/SQL Developer to connect and query the database.
- "WinSCP to connect and access server file system.

### Migrating Excel Upload

To migrate, follow these steps:

1. Open PL/SQL Developer and log in to the source setup's configuration (CONFIG) schema by entering the appropriate username and password.
2. In a new SQL window query the data of table EXCEL\_MAPPING\_MASTER.
3. Open a new session in PL/SQL developer and log in to the target setup's configuration (CONFIG) schema by entering the appropriate username and password.
4. Insert the records from Step 1 above in to this table.
5. In V\_INFODOM column of EXCEL\_MAPPING\_MASTER table update the infodom name with the target infodom name.

---

---

**Note:** If all the mappings can work out of the single target Infodom, update same Infodom value across all rows. If only few mappings will work out of the target infodom, update the infodom value for selective records. Kindly note, excel upload mappings will work only if the target infodom has same data model entities as used in the mappings defined on source setup.

---

---

6. Update V\_CREATED\_BY column with the name of any user present in the target setup that has appropriate roles to perform Excel Upload tasks.

---

---

**Note:** It is mandatory to update values for V\_INFODOM and V\_CREATED\_BY columns.

---

---

7. Open WinSCP and login a new session by entering the host name, port number, user name and password to access the source setup.
8. Navigate to the folder referred as FTPSHARE.
9. Copy the excel-entity mapping xml file(s) which are located in this folder according to their folder structure on to your desktop. For example: /ftpshare /STAGE/ExcelUpload/\$SOURCE\_INFODOM\_NAME/\$EXCEL\_FILE\_NAME.xml

---

---

**Note:** Actual file name of Excel Sheet is mentioned in the V\_EXCEL\_NAME column of EXCEL\_MAPPING\_MASTER table.

---

---

10. Copy the excel templates (.xls/ .xlsx) file(s) which are located in this folder according to their folder structure on to your desktop. For example: /ftpshare/STAGE/ExcelUpload/TEMPLATE/\*.xls or \*.xlsx

---

---

**Note:** Ignore this step if files are not present at the location.

---

---

11. Login a new session in WinSCP by entering the host name, port number, user name and password to access the target setup.
12. Copy the xml file(s) from Step3 to the below location in the target setup. For example: /ftpshare/STAGE/ExcelUpload/\$TARGET\_INFODOM\_NAME/\$EXCEL\_FILE\_NAME.xml

---

---

**Note:** \$TARGET\_INFODOM\_NAME should be target setup infodomain in which you have uploaded the appropriate data model and the name should be same as the V\_INFODOM column value updated in EXCEL\_MAPPING\_MASTER table.

---

---

13. Copy the xls/ xlsx file(s) from Step 3 to the below location in target setup. For example: /ftpshare/STAGE/ExcelUpload/TEMPLATE/\*.xls or \*.xlsx

---

---

**Note:** Ignore this step if files are not present at the location.

---

---

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## JDBC Jar Files

The `ojdbc<version>.jar` file should be copied based on the Oracle Database version and the supported Java (JRE/ JDK) versions. See [Table O-1](#) for details.

**Table O-1** JDBC Jar files version details

Oracle Database Version	JDK/JRE Version Supported	JDBC Jar files specific to the release
12.1 or 12cR1	JDK 8, JDK 7 and JDK 8	ojdbc7.jar for JDK 7/JDK 8 ojdbc6.jar for JDK 6
11.2 or 11gR2	JDK 6 & JDK 5 JDK 7 supported in 11.2.0.3 and 11.2.0.4	ojdbc6.jar for JDK 7 ojdbc6.jar for JDK 6 ojdbc5.jar for JDK 5





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## Upgrading an Existing OFSAA 8.0.x Java 7 Instance to Java 8

This section explains the configurations required to upgrade an existing OFSAA 8.0.x Java 7 instance to Java 8. It consists of the following topics:

- [Prerequisites](#)
- [Upgrading OFSAA 8.0.x Java 7 instance to Java 8](#)
- [Configuring Web application server](#)
- [Configuring User .profile Settings](#)
- [Configuring OFSAA for New Web application server Installation](#)

### Prerequisites

The following are the prerequisites for upgrading OFSAA 8.0.x Java 7 instance to Java 8:

- Java 8 should be installed on the OFSAA server and Web application server.
- Oracle WebLogic Server should be 12.1.3.0 or above. Download and install patch 18729264 from <http://support.oracle.com/> for the same.

### Upgrading OFSAA 8.0.x Java 7 instance to Java 8

To upgrade OFSAA 8.0.x Java 7 instance to Java 8, follow these steps:

1. Configure Web application server to Java 8. For more information, see [Configuring Web application server](#).
2. Configure the OFSAA instance to Java 8. For more information, see [Configurations for Java 8](#). For a newly installed Web application server, see [Configuring OFSAA for New Web application server Installation](#)
3. Restart the OFSAA services. For more information, see the *Start/Stop Infrastructure Services* section in [Appendix E](#)
4. Generate the application EAR/WAR file and redeploy the application onto your configured web application server. For more information on generating and deploying EAR / WAR file, see [Appendix D](#).

## Configuring Web application server

This section describes the changes to be made in the Web application server. Following are the two options to perform Web application server Configurations which are listed as follows:

- Upgrade the existing Web application server installation to Java 8
- Install a new instance of the Web application server with Java 8

This section consists of the following topics:

- [Upgrading Oracle WebLogic Server](#)
- [Upgrading Apache Tomcat Server](#)

### Upgrading Oracle WebLogic Server

Perform the following configurations to upgrade the existing WebLogic server instance to Java 8:

1. Navigate to `<WLS_HOME>/Middleware/Oracle_Home/wlserver.`
2. Edit the `product.properties` file. Set `JAVA_HOME`, `WLS_JAVA_HOME`, `JAVAHOME` properties to the new Java path and `java.vm.version` to the new Java version. For example,

```
JAVA_HOME=/usr/java/jre1.8.0_45
WLS_JAVA_HOME=/usr/java/jre1.8.0_45
JAVAHOME=/usr/java/jre1.8.0_45
java.vm.version=1.8.0_45
```
3. Navigate to `<WLS_HOME>/Middleware/Oracle_Home/user_projects/domains/<domain>/bin`. Update `SUN_JAVA_HOME`, `DEFAULT_JAVA_HOME`, `JAVA_HOME` in the `setDomainEnv.sh` file to point to the new Java path. For example,

```
SUN_JAVA_HOME="/usr/java/jre1.8.0_45"
DEFAULT_SUN_JAVA_HOME="/usr/java/jre1.8.0_45"
JAVA_HOME="/usr/java/jre1.8.0_45"
```
4. Clear the Application cache. Navigate to the following path and delete the files:

```
<WebLogic installation location>/domains/<Domain name>/servers/<Server name>/tmp/_WL_user/<Application name>/qaelce/jsp_servlet
```

If you wish to install a new instance of the Oracle WebLogic Server, follow these steps:

1. Install Oracle WebLogic Server 12.1.3.x on Java 8.
2. Perform the configurations for the newly installed WebLogic server. For more information, see [Configuring Resource Reference in WebLogic Application Server](#).

---

---

**Note:** While creating WebLogic Domain, the Listen Port should be set same as that of the existing Domain.

Note down the new Domain path to perform OFSAA Configurations.

---

---

## Upgrading Apache Tomcat Server

Perform the following configurations to upgrade the existing Apache Tomcat Server from Java 7 to Java 8:

1. Login to the Apache Tomcat Server as a non-root user.
2. Edit the user .profile. Update the value for JAVA\_HOME from JRE 1.7 to JRE 1.8. For Example,

```
JAVA_HOME=/usr/java/jre1.8.0_45
```

3. Clear the Application cache. Navigate to the following path and delete the files:  
`<Tomcat installation folder>/work/Catalina/localhost/<Application name>/org/apache/jsp`

If you wish to install a new instance of the Apache Tomcat Server, follow these steps:

1. Install Apache Tomcat Server 8 with Java 8.
2. Perform the configurations for the newly installed Tomcat server. For more information, see [Configuring Resource Reference in Tomcat Application Server](#).

---

**Note:** Update the Connector Port in `/apache-tomcat-8.0.21/conf/server.xml` file to that of the existing Tomcat instance.

Note down the new deployment path to perform OFSAA Configurations.

---

## Configuring User .profile Settings

Perform the following configurations:

1. Login to the OFSAA Server as a non-root user.
2. Edit the user .profile. Update the value for PATH variable from JRE 1.7 to JRE 1.8. For Example,

```
PATH=/usr/java/jre 1.8.0_45/jre
```

```
JAVA_BIN=/usr/java/jre 1.8.0_45/jre/bin
```

```
LD_LIBRARY_PATH=$LD_LIBRARY_PATH:/usr/java/jre 1.8.0_45/jre/lib/amd64/server
```

## Configuring OFSAA for New Web application server Installation

This configuration is required only if you have freshly installed Oracle WebLogic 12.1.3 or Apache Tomcat Server 8.0. Follow these steps:

1. Modify the following parameters in the Configuration table present in the Config Schema with the new Domain Path in case of WebLogic or with the new deployment path in case of Tomcat:
  - DeFiHome
  - REV\_IMG\_PATH

- EMBEDDED\_JSP\_JS\_PATH
2. Login to the OFSAA Server as a non-root user.
  3. Navigate to `$FIC_HOME/ficweb/webroot/WEB_INF` and update the following parameters in the `web.xml` file with the new Domain path in case of WebLogic or with the new deployment path in case of Tomcat:
    - FIC\_PHYSICAL\_HOME\_LOC
    - FIC\_HOME
    - ICC\_SERVLET\_LOG\_FILE
  4. Navigate to `$FIC_HOME/ficweb/webroot/conf` and update the Domain path in case of WebLogic or with the new deployment path in case of Tomcat:
    - OFSAALogger.xml
    - MDBLogger.xml
    - RevLog4jConfig.xml
    - RFDLogger.xml
    - ExportLog4jConfig.xml
    - RFDLogger.xml
    - PR2Logger.xml

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## Removing OFSAA

This chapter includes the following sections:

- [Uninstalling OFSAA Infrastructure](#)
- [Uninstalling EAR Files in WebSphere](#)
- [Uninstalling EAR Files in WebLogic](#)
- [Uninstalling WAR Files in Tomcat](#)

### Uninstalling OFSAA Infrastructure

This section will guide you through the necessary steps to uninstall the OFSAA Infrastructure product.

Before you start the uninstallation process, ensure that no open connections exist to the OFSAA Infrastructure Config and Atomic Schemas and Infrastructure services are brought down.

To uninstall OFSAA Infrastructure:

1. Log in to the system as non-root user.
2. Navigate to the \$FIC\_HOME directory and execute the command:  

```
./Uninstall.sh
```
3. Enter the password for OFSAAI Configuration Schema when prompted as shown in the following figure.

*Figure 7-20 Uninstalling OFSAA Infrastructure*

```
/scratch/ofsaadb/OFSAAI>./Uninstall.sh
Uninstallation Started [time : Tue Jun 10 14:20:27 IST 2014 ]
*****
*** Driver loaded with Driver oracle.jdbc.driver.OracleDriver

Please enter Configuration schema Password :
Connected to Config Schema
Cleaning config schema ....
config schema cleaned ...
Cleaning up Infrastructure Home Dir !
Please wait ..
Uninstallation Completed ! Thank You [time : Tue Jun 10 14:21:59 IST 2014 ]
*****
/scratch/ofsaadb/OFSAAI>█
```

**Note:**

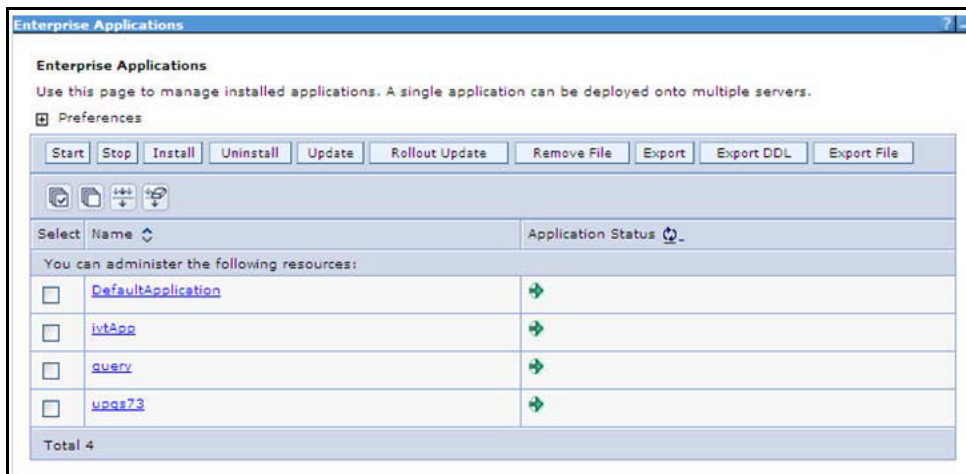
- Uninstallation does not remove the Infrastructure application from the Web application server. This has to be done manually.
- The entries in the .profile file will have to be removed manually.
- The files/ folders under the file system staging area (ftpsare) have to be deleted manually.
- All the Database objects from Atomic Schemas have to be dropped manually.

## Uninstalling EAR Files in WebSphere

Following are the steps to uninstall any previously deployed application:

1. Open the URL in the browser window: `http://<ipaddress>:<Administrative Console Port>/ibm/console` (https if SSL is enabled). The **Login** window is displayed.
2. Login with the user id that has admin rights.
3. Expand Applications > Application Types > WebSphere enterprise applications from the LHS. The **Enterprise Applications** window is displayed with all the deployed applications.

**Figure 7–21 Enterprise Applications**



4. Select the check box adjacent to the application to be uninstalled and click **Stop**.
5. Click **Uninstall**. The **Uninstall Application** window is displayed.

Figure 7-22 Uninstall Application



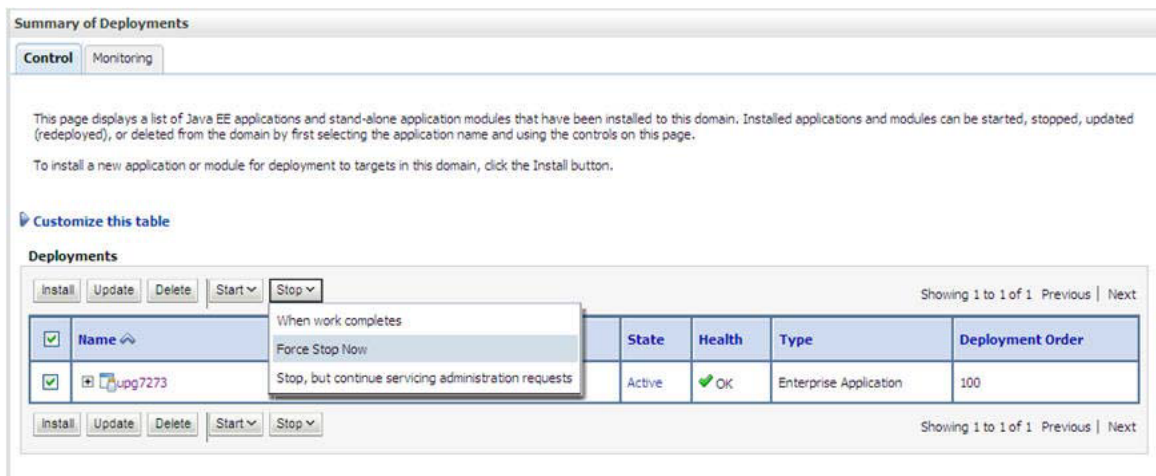
6. Click **OK** to confirm.
7. Click **Save** to save the master file configuration.

## Uninstalling EAR Files in WebLogic

On the machine that hosts WebLogic, perform the following steps to uninstall any previously deployed application:

1. Open the URL in the browser window: `http://<ipaddress>:<admin server port>/console` (https if SSL is enabled). The *Login* window of the WebLogic Server Administration Console is displayed.
2. Login with the WebLogic user credentials having administrator privileges.
3. From the **Domain Structure** LHS menu, click **Deployments**. The *Summary of Deployments* screen is displayed.

Figure 7-23 Summary of Deployments



4. Select the check box adjacent to the application to be uninstalled and click **Stop> Force Stop Now**.
5. Click **Yes** in the confirmation dialog to stop the selected deployment.

**Figure 7–24** *Summary of Deployments- Messages*

6. Select the check box adjacent to the application and click **Delete** to delete the selected deployment.
7. Click **Yes** in the confirmation dialog to remove the selected deployment from the domain configuration.

## Uninstalling WAR Files in Tomcat

On the machine that hosts Tomcat, perform the following steps to uninstall any previously deployed application:

1. Comment out Context path section from `server.xml` file in `$CATALINA_HOME/conf` directory to avoid conflict during undeploy and re-deploy of the WAR file.

Place comment `<!-- -->` in between the context path section. For example:

```
<!--
<Context path ="/pr2test"
docBase="/home/perfuser/tomcat-7.0.19/webapps/pr2test" debug="0"
reloadable="true" crossContext="true">
<Resource auth="Container"
name="jdbc/PR2ATM"
type="javax.sql.DataSource"
driverClassName="oracle.jdbc.driver.OracleDriver"
username="pr2atm"
password="pr2atm"
url="jdbc:oracle:thin:@10.184.74.99:1521:PERFTEST"
maxActive="100"
maxIdle="30"
maxWait="10000"/>
</Context>
```

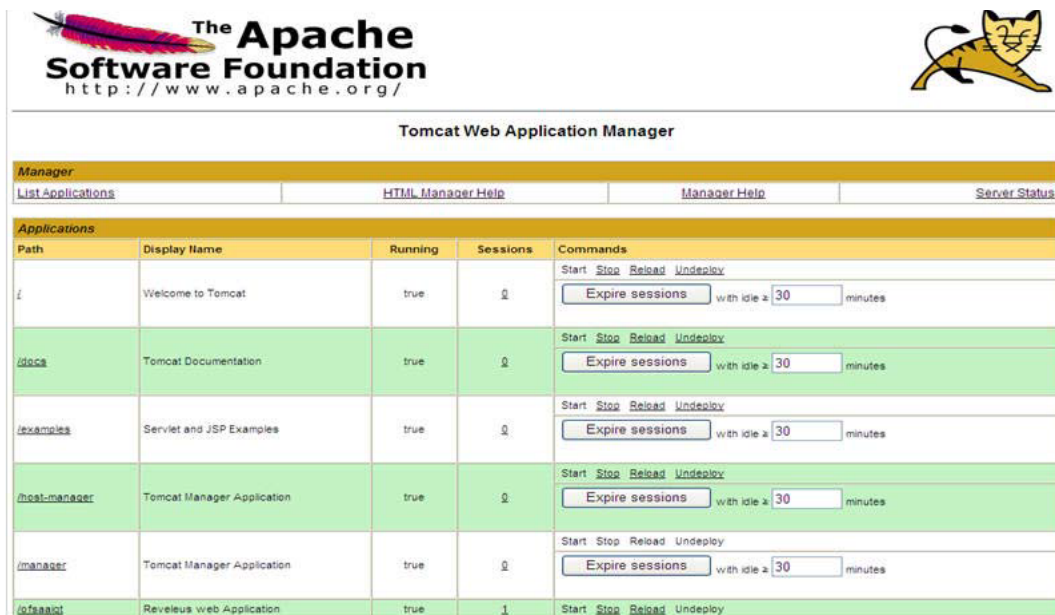


--&gt;

Restart the Tomcat service by doing the following:

- d. Login to the "Unix server" through a terminal emulator.
  - e. Navigate to `$catalina_home/bin` directory.
  - f. Stop the tomcat services using the command `./shutdown.sh`
  - g. Start the tomcat services using the command `./startup.sh`
2. Open the URL in a browser window: `http://<IP address>:<Tomcat server port>`. (https if SSL is enabled). The *Tomcat home* window is displayed.
  3. Click the **Manager App**. The *Connect to* window is displayed.
  4. Login with the user credentials having admin rights. The *Tomcat Web Application Manager* window is displayed with the list of all applications deployed in Tomcat.

Figure 7-25 Tomcat Web Application Manager



The screenshot shows the Tomcat Web Application Manager interface. At the top, there is the Apache Software Foundation logo on the left and the Tomcat tiger logo on the right. Below the logos, the title 'Tomcat Web Application Manager' is centered. Underneath, there are navigation links: 'List Applications', 'HTML Manager Help', 'Manager Help', and 'Server Status'. The main content area is a table with the following data:

Path	Display Name	Running	Sessions	Commands
/	Welcome to Tomcat	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
/docs	Tomcat Documentation	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
/examples	Servlet and JSP Examples	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
/host-manager	Tomcat Manager Application	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
/manager	Tomcat Manager Application	true	0	Start Stop Reload Undeploy Expire sessions with idle ≥ 30 minutes
/ofsaact	Reveleus web Application	true	1	Start Stop Reload Undeploy

5. Click the **Undeploy** link against the deployed Infrastructure application. A confirmation message is displayed on the application /Infrastructure being uninstalled.



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# Configuring Transparent Data Encryption (TDE) and Data Redaction in OFSAA

Two features comprise Oracle Advanced Security: Transparent Data Encryption and Oracle Data Redaction

This section details about the configurations required in case you want to enable TDE or Data Redaction in OFSAA applications.

This section includes the following:

- [Transparent Data Encryption \(TDE\)](#)
- [Data Redaction](#)

## Transparent Data Encryption (TDE)

Transparent Data Encryption (TDE) enables you to encrypt sensitive data, such as Personally Identifiable Information (PII), that you store in tables and tablespaces. After the data is encrypted, this data is transparently decrypted for authorized users or applications when they access this data. To prevent unauthorized decryption, TDE stores the encryption keys in a security module external to the database, called a Keystore. For more details on TDE, see the [Database Advanced Security Guide](#). TDE tablespace encryption enables you to encrypt all of the data stored in a tablespace. To control the encryption, you use a Keystore and TDE master encryption key. Oracle Database supports both software keystores and hardware, or HSM-based, keystores. A software keystore is a container for the TDE master encryption key, and it resides in the software file system.

## Configuring TDE During Enterprise Case Management Installation Using Full Installer

This section provides information on how to enable TDE (Transparent Data Encryption) in the database. This section consists of the following sub sections:

- [Configuring a Software Keystore and Encrypted Tablespace Creation](#)
- [Running the Schema Creator Utility With Encryption](#)
- [Testing the Encryption](#)

### Configuring a Software Keystore and Encrypted Tablespace Creation

A software keystore is a container for the TDE master encryption key, and it resides in the software file system. You must define a location for the key in the `sqlnet.ora` file so that the database locates the keystore (one per database) by checking the keystore

location in the `sqlnet.ora` file. After defining the location, create the keystore and open it. Set the TDE master key after opening it and then encrypt the data

To find whether a wallet is already existing, check the following entries:

1. The location specified by the `ENCRYPTION_WALLET_LOCATION` parameter in the `sqlnet.ora` file.
2. The location specified by the `WALLET_LOCATION` parameter in the `sqlnet.ora` file.

Encrypted tablespaces can share the default database wallet. However, Oracle recommends that you use a separate wallet for transparent data encryption functionality by specifying the `ENCRYPTION_WALLET_LOCATION` parameter in the `sqlnet.ora` file.

---

---

**Note:** NOTE: You should have proper privileges to perform the following actions.

---

---

For details to configure the software keystore, perform the following steps:

### Step 1: Set the Software keystore location in the `sqlnet.ora` file

The first step is to designate a location for software keystore in the `sqlnet.ora` file. The Oracle Database will check the `sqlnet.ora` file for the directory location of the keystore to determine whether it is a software keystore or a hardware module security (HSM) keystore

---

---

**Note:** Ensure that the directory location which you want to set for software keystore exists beforehand. Preferably, this directory should be empty.

In a multitenant environment, the keystore location is set for the entire multitenant container database (CDB), not for individual pluggable databases (PDBs).

By default, the `sqlnet.ora` file is located in the `ORACLE_HOME/network/admin` directory or in the location set by the `TNS_ADMIN` environment variable. Ensure that you have properly set the `TNS_ADMIN` environment variable to point to the correct `sqlnet.ora` file.

---

---

To create a software keystore on a regular file system, use the following format when you edit the `sqlnet.ora` file:

```
ENCRYPTION_WALLET_LOCATION=
  (SOURCE=
    (METHOD=FILE)
    (METHOD_DATA=
      (DIRECTORY=<<path to keystore>>))
```

### Examples:

For regular file system in which the database name is `orclb`:

```
ENCRYPTION_WALLET_LOCATION=
```

```
(SOURCE=
(METHOD=FILE)
(METHOD_DATA=
(DIRECTORY=/etc/ORACLE/WALLETS/orcl)))
```

When multiple databases share the `sqlnet.ora` file:

```
ENCRYPTION_WALLET_LOCATION=
(SOURCE=
(METHOD=FILE)
(METHOD_DATA=
(DIRECTORY=/etc/ORACLE/WALLETS/orcl)))
```

When Oracle Automatic Storage Management (ASM) is configured:

```
ENCRYPTION_WALLET_LOCATION=
(SOURCE=
(METHOD=FILE)
(METHOD_DATA=
(DIRECTORY=+disk1/mydb/wallet)))
```

For ASM Diskgroup:

```
ENCRYPTION_WALLET_LOCATION=
(SOURCE=
(METHOD=FILE)
(METHOD_DATA=
(DIRECTORY=+ASM_file_path_of_the_diskgroup)))
```

## Step 2: Create the Software Keystore

There are three different types of Software Keystores:

- Password-based Software Keystores
- Auto-login Software Keystores
- Local Auto-login Software Keystores

Perform the following steps to create a software keystore:

1. Login as `sysdba` or user with `ADMINISTER KEY MANAGEMENT` or `SYSKM` privilege.
2. Use the following command to create password-based software keystore:

```
CONN sys/password@serviceid AS SYSDBA
ADMINISTER KEY MANAGEMENT CREATE KEYSTORE 'keystore_location'
IDENTIFIED BY software_keystore_password;
```

- `keystore_location` is the path of the keystore directory you want to create
- `software_keystore_password` is the password of the keystore that you want to create.

For example, to create the keystore in the `/etc/ORACLE/WALLETS/orcl` directory:

```
ADMINISTER KEY MANAGEMENT CREATE KEYSTORE '/etc/ORACLE/WALLETS/orcl'  
IDENTIFIED BY password;
```

After you run this statement, the `ewallet.p12` file, which is the keystore, appears in the keystore location.

Alternatively, you can create an Auto-Login or Local-Login Keystore to avoid opening the Keystore manually every time. Use the following command:

```
ADMINISTER KEY MANAGEMENT CREATE [LOCAL] AUTO_LOGIN KEYSTORE FROM  
KEYSTORE 'keystore_location' IDENTIFIED BY keystore_password;
```

`LOCAL` enables you to create a local auto-login software keystore. Otherwise, omit this clause if you want the keystore to be accessible by other computers.

After you run this statement, the `cwallet.sso` file appears in the keystore location.

---

---

**Note:** It is important to remember the master key password (<keystore\_password>) used during creation of the keystore. There are no ways to retrieve the password if forgotten.

---

---

### Step 3: Open the Software Keystore

Depending on the type of keystore you create, you must manually open the keystore before you can use it.

You do not need to manually open auto-login or local auto-login software keystores. These keystore are automatically opened when it is required, that is, when an encryption operation must access the key. If necessary, you can explicitly close any of these types of keystores. You can check the status of whether a keystore is open, closed, open but with no master key, or open but with an unknown master key by querying the `STATUS` column of the `V$ENCRYPTION_WALLET` view.

---

---

**Note:** After you open a keystore, it remains open until you manually close it. Each time you restart a database instance, you must manually open the password keystore to re-enable encryption and decryption operations.

---

---

Perform the following steps to open the software wallet:

1. Login as `sysdba` or user with `ADMINISTER KEY MANAGEMENT` or `SYSKM` privilege.
2. Use the following command to open password-based software keystore:

```
CONN sys/password@serviceid AS SYSDBA
```

```
ADMINISTER KEY MANAGEMENT SET KEYSTORE OPEN IDENTIFIED BY software_  
keystore_password [CONTAINER = ALL | CURRENT];
```

- `software_keystore_password` is the same password that you used to create the keystore in "Step 2: Create the Software Keystore".
- `CONTAINER` is for use in a multitenant environment. Enter `ALL` to set the keystore in all of the PDBs in this CDB, or `CURRENT` for the current PDB.

---



---

**Note:** In a CDB, open the Keystore in the ROOT (CDB\$ROOT) container and in all the associated PDBs, where TDE is enabled.

You do not need to manually open auto-login or local auto-login software Keystores.

---



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#### Step 4: Set the Software TDE Master Encryption Key

Once the keystore is open, you can set a TDE master encryption key for it. The TDE master encryption key is stored in the keystore. This key protects the TDE table keys and tablespace encryption keys. By default, the TDE master encryption key is a key that Transparent Data Encryption (TDE) generates.

In a multitenant environment, you can create and manage the TDE master encryption key from either the root or the PDB.

Ensure that the database OPEN\_MODE is set as READ WRITE. To find the status for a non-multitenant environment, query the OPEN\_MODE column of the V\$DATABASE dynamic view. If you are using a multitenant environment, then query the V\$PDBS view. (If you cannot access these views, then connect as SYSDBA and try the query again. In order to connect as SYSKM for this type of query, you must create a password file for it. See Oracle Database Administrator's Guide for more information.)

Perform the following steps to set the encryption key:

1. Login as sysdba or user with ADMINISTER KEY MANAGEMENT or SYSKM privilege
2. Use the following command to set the encryption key:

```
CONN sys/password@serviceid AS SYSDBA
```

```
ADMINISTER KEY MANAGEMENT SET KEY [USING TAG 'tag'] IDENTIFIED BY
password [WITH BACKUP [USING 'backup_identifier']] [CONTAINER = ALL |
CURRENT];
```

- tag is the associated attributes and information that you define. Enclose this setting in single quotation marks ( ' ' ).
- password is the mandatory keystore password that you created when you created the keystore in "Step 2: Create the Software Keystore".
- WITH BACKUP creates a backup of the keystore. You must use this option for password-based keystores. Optionally, you can use the USING clause to add a brief description of the backup. Enclose this description in single quotation marks ( ' ' ). This identifier is appended to the named keystore file (for example, ewallet\_time\_stamp\_emp\_key\_backup.p12, with emp\_key\_backup being the backup identifier). Follow the file naming conventions that your operating system uses.
- CONTAINER is for use in a multitenant environment. Enter ALL to set the key in all of the PDBs in this CDB, or CURRENT for the current PDB.

For example,

```
ADMINISTER KEY MANAGEMENT SET KEY IDENTIFIED BY password WITH BACKUP
USING 'emp_key_backup';
```

#### Step 5: Encrypting your Data

After completing the keystore configuration, encrypt the data. You can encrypt individual columns in a table or entire tablespaces. OFSAA recommends encrypting entire tablespaces and the description in this section covers encrypting entire tablespaces.

Note the following restrictions on using Transparent Data Encryption when you encrypt a tablespace:

- Transparent Data Encryption (TDE) tablespace encryption encrypts or decrypts data during read and write operations, as compared to TDE column encryption, which encrypts and decrypts data at the SQL layer. This means that most restrictions that apply to TDE column encryption, such as data type restrictions and index type restrictions, do not apply to TDE tablespace encryption.
- To perform import and export operations, use Oracle Data Pump.

Encrypting data involves the following steps:

1. Setting the COMPATIBLE initialization parameter for tablespace encryption
2. Setting the tablespace TDE master encryption key
3. Creating the Encrypted Tablespace

**Step 1: Setting the COMPATIBLE initialization parameter for tablespace encryption**

Prerequisite- You must set the COMPATIBLE initialization parameter for the database to 11.2.0.0 or later. Once you set this parameter to 11.2.0.0, the change is irreversible.

Perform the following steps to set the COMPATIBLE initialization parameter:

1. Log into the database instance. In a multitenant environment, log into the PDB.
2. Check the current setting of the COMPATIBLE parameter.

For example:

**Table R-1 SHOW PARAMETER COMPATIBLE**

Name	Type	Value
Compatible	String	12.0.0.0
noncdbcompatible	Boolean	False

3. If you want to change the COMPATIBLE parameter, perform the following steps:
  1. Locate the initialization parameter file for the database instance.  
 UNIX systems: This file is in the ORACLE\_HOME/dbs directory and is named initORACLE\_SID.ora (for example, initmydb.ora).
  2. In SQL\*Plus, connect as a user who has the SYSDBA administrative privilege, and then shut down the database.

For example:

```
CONNECT /AS SYSDBA
SHUTDOWN
```

3. Edit the initialization parameter file to use the correct COMPATIBLE setting.

For example:

```
COMPATIBLE = 12.2.0.0
```



- In SQL\*Plus, ensure that you are connected as a user who has the SYSDBA administrative privilege, and then start the database.

For example:

```
CONNECT /AS SYSDBA

STARTUP
```

- If tablespace encryption is in use, then open the keystore at the database mount. The keystore must be open before you can access data in an encrypted tablespace.

```
STARTUP MOUNT;

ADMINISTER KEY MANAGEMENT SET KEYSTORE OPEN IDENTIFIED BY password;

ALTER DATABASE OPEN;
```

### Step 2: Setting the tablespace TDE master encryption key

Make sure that you have configured the TDE master encryption key as shown in Step 4: Setting the software TDE master encryption key.

### Step 3: Creating the Encrypted Tablespace

After you have set the COMPATIBLE initialization parameter, you are ready to create the encrypted tablespace.

Follow the instruction given in Running the Schema Creator Utility with Encryption section for configuring the schema creator file to create tablespaces.

If you are enabling TDE in case of upgrade or you did not enable it during installation and want to enable at a later point of time, see the following reference link for details on manually creating encrypted tablespaces:

[https://docs.oracle.com/cloud/latest/db121/ASOAG/asotrans\\_config.htm#ASOAG9555](https://docs.oracle.com/cloud/latest/db121/ASOAG/asotrans_config.htm#ASOAG9555)

## Running the Schema Creator Utility With Encryption

This section is applicable only if you want to enable TDE during installation.

Run the schema creator utility by including the **encrypt=on** option in the Tablespace tag in the <<APP\_PACK>>\_SCHEMA\_IN.xml file. You have to perform this procedure manually as it is not a part of the <<APP\_PACK>>\_SCHEMA\_IN.xml.TEMPLATE originally.

Following is an example for OFS \_AAAI\_PACK\_ SCHEMA\_IN.xml

```
<APPPACKSCHEMA>

<APP_PACK_ID>OFS_AAAI_PACK</APP_PACK_ID>

<JDBC_URL>jdbc:oracle:thin:@<DB_Server_IP>:1521:<DB_NAME></JDBC_URL>

<JDBC_DRIVER>oracle.jdbc.driver.OracleDriver</JDBC_DRIVER>

<HOST><OFSAA_Server_IP/HOST Name></HOST>

<SETUPINFO NAME="<PREFIX_NAME>" PREFIX_SCHEMA_NAME="Y" />

<PASSWORD APPLYSAMEFORALL="Y" DEFAULT="<PASSWORD>" />

<TABLESPACES>

<TABLESPACE NAME="OFS_AAI_TBSP" VALUE="TS_USERS1" DATAFILE="<ABSOLUTE PATH
to TABLESPACE>/<TABLESPACE_DATA_FILE_NAME>.dbf" SIZE="500M"
AUTOEXTEND="OFF" ENCRYPT="ON" />

</TABLESPACES>
```

```

<SCHEMAS>
<SCHEMA TYPE="CONFIG" NAME="ofsaconf" PASSWORD="" APP_ID="OFS_AAI"
DEFAULTTABLESPACE="##OFS_AAI_TBSP##" TEMPTABLESPACE="TEMP"
QUOTA="unlimited" />
<SCHEMA TYPE="ATOMIC" NAME="ofsaaatm" PASSWORD="" APP_ID="OFS_AAAI"
DEFAULTTABLESPACE="##OFS_AAI_TBSP##" TEMPTABLESPACE="TEMP"
QUOTA="unlimited" INFODOM="OFSAAAIINFO" />
<SCHEMA TYPE="ATOMIC" NAME="ofsaaatm" PASSWORD="" APP_ID="OFS_IPE"
DEFAULTTABLESPACE="##OFS_AAI_TBSP##" TEMPTABLESPACE="TEMP"
QUOTA="unlimited" INFODOM="OFSAAAIINFO" />
</SCHEMAS>
</APPPACKSCHEMA>

```

### Testing the Encryption

Test the encryption by checking if a tablespace is encrypted or not. Execute the following query to check:

```
SELECT tablespace_name, encrypted FROM dba_tablespaces;
```

The following result is displayed, which indicates whether the TABLESPACE is encrypted or not in the ENCRYPTED column:

**Table R-2**

TABLESPACE_NAME	ENCRYPTED
SYSTEM	No
SYSAUX	No
UNDOTBS1	No
TEMP	No
USERS	No
ENCRYPTED_TS	Yes

6 rows selected.

The above example indicates TABLESPACE ENCRYPTED\_TS is created with Encryption ON.

### Configuring TDE in Case of Upgrade

This section details about the configurations required in case you want to enable TDE in OFSAA applications after upgrade to OFSAA 8.0.7.0.0 version from a previous version. Additionally, these configurations are required in case you did not enable TDE during 8.0.7.0.0 installation and want to enable at a later point of time.

1. Create a new PDB (12c)/ instance (11g) on same or different Database Server for TDE. For more information, see Configuring Software Keystore and Encrypted Tablespace Creation.
2. Shutdown the OFSAAI Services.
3. Export all Configuration, Atomic and Sandbox Schemas as per the applications installed in your OFSAA instance.

For example:

```
expdp SYSTEM/oracle@OFSAA12C2DB DIRECTORY=data_pump_dir
DUMPFILE=ofsaaconf_ofsaaatm_%U.dmp filesize=2G
SCHEMAS=ofsaaconf,ofsaaatm LOGFILE=ofsaaconf_ofsaaatm_exp.log
```

---



---

**Note:** The above command will create data dumps as files of 2GB size each (multiples). Any other commands/ tools as appropriate may be used to archive the schemas.

---



---

4. Import all schemas that are exported using the above command, into the new DB instance.

For example:

```
impdp SYSTEM/oracle@OFSAA12nDB DIRECTORY=data_pump_dir
DUMPFILE=ofsaaconf_ofsaaatm_%U.dmp SCHEMAS=ofsaaconf,ofsaaatm
LOGFILE=ofsaaconf_ofsaaatm_imp.log
```

---



---

**Note:** Restoring the exported dumps creates Configuration and Atomic Schema(s) with the same user credentials as that of the source, along with the existing grants.

- If schemas are restored using a tool/ mechanism other than as mentioned in the Step 1 and 2, retain the user credentials of Configuration and Atomic Schemas same as in the Source environment, along with the Schema grants.
- 
- 

5. Provide select grants on `sys.V_$parameter` to view Configuration and Atomic Schemas of Target Environment database

For example:

Login as sys user:

```
SQL> GRANT SELECT ON SYS.V_$PARAMETER TO ofsaaconf;
```

Grant succeeded

```
SQL> GRANT SELECT ON SYS.V_$PARAMETER TO ofsaaatm;
```

Grant succeeded

6. Update `.profile` for `ORACLE_SID` environment variable with new `ORACLE_SID`.
7. Update JDBC URL by executing Port Changer utility. For details on how to execute Port Changer utility, see Changing IP/ Hostname, Ports, Deployed paths, Protocol of the OFSAA Instance section.
8. Navigate to the `$FIC_WEB_HOME` directory and execute the following command to trigger the creation of EAR/WAR file:

```
./ant.sh
```

9. The EAR/WAR file - `<contextname>.ear/.war` - is created in `$FIC_WEB_HOME` directory.
10. On completion of EAR/WAR file creation, the message "BUILD SUCCESSFUL" will be displayed.
11. Edit the existing Connection Pool settings to point to new JDBC URL and verify connections.

12. Clear the webserver cache and redeploy the application onto your configured web application server.
13. Restart the OFSAA Services. For more information, refer to the Start/Stop Infrastructure Services section in the [Oracle Financial Services Advanced Analytical Applications Infrastructure Application Pack Installation and Configuration Guide 8.0.2.0.0](#).

## Data Redaction

OFSAA is enhanced to enable masking of sensitive data and Personal Identification Information (PII) to adhere to Regulations and Privacy Policies. Oracle Data Redaction provides selective, on-the-fly redaction of sensitive data in database query results prior to display by applications so that unauthorized users cannot view the sensitive data. The stored data remains unaltered, while displayed data is transformed to a pattern that does not contain any identifiable information.

### Enabling Data Redaction in case of Upgrade

This section details about the configurations required in case you want to enable Data Redaction in OFSAA applications after upgrade to OFSAA 8.0.7.0.0 version from a previous version. Additionally, these configurations are required in case you did not enable TDE during ECM Application Pack 8.0.7.0.0 installation and want to enable at a later point of time.

Perform the following steps:

1. Login as SYSDBA into the database.
2. Execute the file `$FIC_HOME/utility/data_security/scripts/create_data_sec_roles.sql` only once per database (PDB in case of 12c).
3. Execute the following sql statement to find out the list of atomic users from the table:  

```
select v_schema_name from aai_db_detail where V_DB_NAME <> 'CONFIG' AND V_DB_TYPE = 'ORACLE'
```
4. Execute the file `$FIC_HOME/utility/data_security/scripts/grant_data_sec_roles.sql` for all atomic users found in the previous step.
5. From the *Configuration* window in the *System Configuration* module, select the **Allow Data Redaction** checkbox.
6. Run the Data Redaction utility. For more details on how to run the utility, see *Data Redaction* section under *Data Security and Data Privacy* chapter in OFS Analytical Applications Infrastructure Administration Guide 8.0.7.0.0.

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## Tunable Database Parameters

This appendix contains the Tunable Database Parameters.

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**Note:** Review the Oracle recommended guidelines in setting the `SGA_TARGET`, `SGA_MAX_SIZE` and `PGA_AGGREGATE_TARGET` parameters. The values for these memory parameters can vary significantly based on database server specifications and estimated data volume. For values of `PGA_AGGREGATE_TARGET` parameters Oracle recommends that they be kept at a minimum of 1024 MB.

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**Table S-1 Database Tunable Parameters**

Tunable Database Parameters		Parameter Values			
Category	Parameter Name	Type	Default	Oracle Recommended	Oracle Recommended for Exadata
Parameters affecting database creation (not tunable through the <code>init.ora</code> file)	<code>CHARACTER SET</code>	string	AL32UTF8	AL32UTF8	AL32UTF8
	<code>NLS_LENGTH_SCHMATIC</code>	string	byte	byte	byte
	<code>NLS_SORT</code>	binary	binary	binary	binary
	<code>MAXDATAFILES</code>	integer	254		
	<code>MASINSTANCES</code>	integer	1		
	<code>MAXLOGFILES</code>	integer	32		
	<code>MAXLOGHISTORY</code>	integer	24794		
	<code>MAXLOGMEMBERS</code>	integer	2	4	4
	<code>REDO LOG SIZE</code>	integer	10M	3G	16G

**Table S-1 Database Tunable Parameters**

Tunable Database Parameters		Parameter Values			
Category	Parameter Name	Type	Default	Oracle Recommended	Oracle Recommended for Exadata
Parameters affecting I/O operation	DB_BLOCK_SIZE	integer	2048	8192	8192
	DB_FILE_MULTIBLOCK_READ_COUNT	integer	The default value corresponds to the maximum I/O size that can be efficiently performed and is platform-dependent.	32	32
	DB_FILES	integer	200		
	DISK_ASYNCH_IO	boolean	TRUE		
	TAPE_ASYNCH_IO	boolean	TRUE		
	DB_WRITER_PROCESSES	integer	1	4	4

**Table S-1 Database Tunable Parameters**

Tunable Database Parameters		Parameter Values			
Category	Parameter Name	Type	Default	Oracle Recommended	Oracle Recommended for Exadata
Parameters affecting resource consumption and parallel operations	FAST_START_PARALLEL_ROLLBACK	string	LOW	HIGH	HIGH
	LOG_BUFFER	integer	7M	10000000	10000000
	LOG_CHECKPOINT_INTERVAL	integer	0	10000	10000
	LOG_CHECKPOINT_TIMEOUT	integer	0	0	0
	OPEN_CURSORS	integer	50	4096	4096
	PARALLEL_EXECUTION_MESSAGE_SIZE	integer	2148	16384	16384
	PARALLEL_MAX_SERVERS	integer	10 * No of CPUs	Set if you are configuring DOP manually at site and PARALLEL_DEGREE_POLICY is set to MANUAL.	Do not set or change
	PARALLEL_MIN_SERVERS	integer	0	Set if you are configuring DOP manually at site and PARALLEL_DEGREE_POLICY is set to MANUAL.	Do not set or change
	PROCESSES	integer	150	600	600
	LARGE_POOL_SIZE	integer	0	512M	
	PARALLEL_MIN_PERCENT	integer	0	Set if you are configuring DOP manually at site and PARALLEL_DEGREE_POLICY is set to MANUAL.	Do not set or change
PARALLEL_THREADS_PER_CPU	integer	2			

**Table S-1 Database Tunable Parameters**

Tunable Database Parameters		Parameter Values			
Category	Parameter Name	Type	Default	Oracle Recommended	Oracle Recommended for Exadata
Additional needed parameters	OPTIMIZER_MODE	string	ALL_ROWS	ALL_ROWS	ALL_ROWS
	COMPATIBLE	string		11.2.0 (for Oracle 11gR2)	11.2.0.3.0(if using Oracle 11.2.0.3.0) otherwise 11.2.0.2.0
	GLOBAL_NAMES	string	FALSE	TRUE	TRUE
	PRE_PAGE_SGA	string	FALSE	TRUE	TRUE
	UNDO_MANAGEMENT	string	AUTO	AUTO	AUTO
	UNDO_TABLESPACE	string		Set as Per Site Values	Set as Per Site Values
	UNDO_RETENTION	integer	900	10800	18000
	TIMED_STATISTICS	boolean	TRUE	TRUE	TRUE
	OPTIMIZER_INDEX_CACHING	integer	0		
	OPTIMIZER_INDEX_COST_ADJ	integer	100	30	
	QUERY_REWRITE_ENABLED	string	TRUE	FALSE	FALSE
	STAR_TRANSFORMATION_ENABLED	string	FALSE	FALSE	FALSE



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## FAQs and Error Dictionary

This section of the document consists of resolution to the frequently asked questions and error codes noticed during OFSAAI installation.

- [Frequently Asked Questions](#)
- [Error Dictionary](#)

OFSAAI installer performs all the pre-requisite validation check during installation. Any errors encountered in the process is displayed with an appropriate Error Code. You can see the Error Dictionary to find the exact cause and resolution to rectify the error.

### Frequently Asked Questions

You can see the Frequently Asked Questions which has been developed with the interest to help you resolve some of the OFSAAI Installation and configuration issues. This intends to share the knowledge of problem resolution to a few of the known issues. This is not an official support document and just attempts to share the knowledge of problem resolution to a few of the known issues.

This section includes the following topics:

- [OFSAAI FAQs](#)
- [Applications Pack 8.0.7.0.0 FAQs](#)
- [Forms Framework FAQs](#)

### OFSAAI FAQs

*What are the different components that get installed during OFSAAI?*

The different components of OFSAAI are illustrated in [Figure 1-2, "Components of OFSAAI"](#).

*What are the different modes of OFSAAI installation?*

OFSAAI can be installed in Silent mode.

*Can the OFSAA Infrastructure components be installed on multi-tier?*

No. OFSAA Infrastructure components (ficapp, ficweb, ficdb) cannot be installed on multi-tier. By default, they will be installed on single-tier. However, OFSAA Infrastructure can be deployed within the n-Tier architecture where the Database, Web server and Web application server is installed on separate tiers.

*Is JDK (Java Development Kit) required during installation of OFSAA? Can it be uninstalled after OFSAA installation?*

JDK is not required during installation of OFSAA and only a run time is needed for details. See [Hardware and Software Requirements](#), Java Runtime Environment section.

*Is JRE required during installation of OFSAA? Can it be uninstalled after OFSAAI installation?*

Only JRE (Java Runtime Environment) is required during installation of OFSAA and cannot be uninstalled as the JRE is used by the OFSAA system to work.

*How do I know what is the Operating system, web servers and other software versions that OFSAA supports?*

See OFSAA Technology Stack Matrices.

*What are the different files required to install OFSAAI?*

The following files are required:

- setup.sh
- envCheck.sh
- preinstallcheck.sh
- VerInfo.txt
- OFSAAInfrastructure.bin
- validatedXMLinputs.jar
- MyResources\_en\_US.properties
- log4j.xml
- OFSAAI\_PostInstallConfig.xml
- OFSAAI\_InstallConfig.xml
- privileges\_config\_user.sql
- privileges\_atomic\_user.sql
- XML\_Utility.jar

*What should I do if I get the following error message during installation, "Execute Permission denied"?*

Please check whether all the files provided for OFSAAI installation has execute permissions.

To give execute permissions,

- Navigate to the path OFSAAI\_80000 and execute the command  
`chmod 755`

*"Graphical installers are not.."*

If error resembles "Graphical installers are not supported by the VM. The console mode will be used instead..." then check whether any of the X-windows software has been installed.

Example: Hummingbird Exceed is started and configured to Graphical mode installation.

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**Note:** Type 'xclock' from prompt and this should display clock in graphical mode.

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***"No Java virtual machine could be..."***

If the error message reads "No Java virtual machine could be found from your PATH environment variable. You must install a VM prior to running this program", then

- Check whether "java path" is set in PATH variable. See the [Table 3-1, "Prerequisite Information"](#) section in this document.
- Check whether sufficient temporary space is available.
- Ensure that the movement of OFSAAI Installer text files to the target system is done in the Text mode so that `setup.sh` file does not contain control line feed characters (^M).

***What should I do if I get the following error message during installation, "OracleDriver Files Not Found, Please Choose the Right Path To Continue"?***

Check whether the provided path for Oracle Driver files is correct and whether the user has permissions to access the files.

***What should I do if I get the following error message during installation, "User must have CREATE TABLE, CREATE VIEW, CREATE TRIGGER, CREATE INDEX, CREATE SEQUENCE, CREATE PROCEDURE" even though the oracle schema user created has the mentioned privileges?***

OFSAAI installer validates the database details provided during installation, so ensure:

- Whether the oracle schema user has the required set of privileges for successful installation.
- Whether the oracle schema user has been created with quota privileges on tablespace to create database objects.
- See the [Table 3-1, "Prerequisite Information"](#) section in this document.

***Installation of OFSAAI was completed successfully! What next?***

Post the successful completion of OFSAAI installation, one has to perform the Post Installation steps. See [Chapter 5, "Post Installation Configuration"](#).

***What is to be done when OFSAAI Installation is unsuccessful?***

OFSAAI installer generates log file `OFSAAIInfrastructure_Install.log` in the Infrastructure Installation Directory. There is also another log file created in the path configured in `Log4j.xml`. The logs of any of these reported, Warnings/Non Fatal Errors/Fatal Errors/Exceptions should be brought to the notice of the OFSAAI Customer Support. It is recommended not to proceed, until the reported problems are adequately addressed.

***How do I completely uninstall OFSAAI?***

OFSAAI can be completely uninstalled by performing the steps provided in [Uninstalling OFSAA Infrastructure](#) in the OFS AAI Installation and Configuration Guide Release 8.0.7.0.0.

***Can OFSAAI config and atomic schemas be on different databases?***

OFSAAI requires both config and atomic schemas to be present on the same database instance.

***How to grant privileges if a new information domain is created?***

If you are creating a new information domain, provide a set of privileges (database permissions) to the new Atomic schema.

- Log into the database as **sys** and connect as **sysdba** user.
- Execute the file `privileges_config_user.sql` available under `$FIC_HOME` directory
- Enter the database schema for which you want to grant privileges.

### *When should I run the MLS utility?*

See the Multiple Language Support (MLS) Utility section in OFS AAI Administration Guide available on [OTN](#).

### *Does OFSAAI support Oracle Linux versions other than 5.5?*

OFSAAI supports the Oracle Linux versions from 5.5 up to 5.10 and also from 6.0 and above.

### *What should I do if I get the following error message on the UNIX System terminal while executing `./setup.sh`, "Insert New Media. Please insert Disk1 or type its location"?*

1. Login as root user on the Unix machine where OFSAAI is getting installed.
2. Navigate to the path `/etc/security/`.
3. Edit the file `limits.conf` to add/edit a row for the unix user installing OFSAA:  

```
<Unix User> soft nofile 9216
```
4. After saving the changes, log in as unix user with which OFSAAI is getting installed and execute the command:

```
ulimit -n
```

The command should return the value 9216.

### *How do I verify if the system environment is ready for OFSAAI installation?*

To verify the system environment meets the minimum requirements for the installation, a Pre-Install Check utility is available within the Install Kit archive file. This utility can also be obtained separately by contacting Oracle Support Services.

See [Verifying System Environment](#) section for additional information.

### *How do I know if the installation is completed successfully?*

The OFSAA Infrastructure installation performs a post install health check automatically on successful installation of the product. To rerun the post install verification at a later time, perform the following steps:

1. Navigate to the path `$FIC_HOME` (Product Installation Directory).
2. Execute the command:

```
./piverify.sh
```

### *What should I do if I get the following error message during OFSAAI installation on Solaris 11 system?:*

```
"Error: OFSAAI-1108
```

```
ORA-00604: error occurred at recursive SQL level 1
```

```
ORA-01882: timezone region not found"
```

Or

*"Time zone cannot be set as null or 'localtime' "*

This happens if the time zone is not set, that is NULL or it is set as 'localtime'. Set the environment variable TZ to a valid time zone region in the .profile file. For example,

```
TZ=Asia/Calcutta
export TZ
```

*What should I do if there are any exceptions or errors in installation and how to proceed?*

1. Please backup the installation logs.
2. Share the backup logs with Oracle support.

*What should I do if the installation process is abruptly terminated or aborted?*

If the installation is abruptly terminated, then the installation process will be incomplete. To recover from this, follow the below steps:

1. Drop the DB objects in the config schema created by OFSAAI installation.
2. Open the .profile and remove the entries made by the OFSAAI installation which are made between the comment statements, #Beginning of entries by OFSAA Infrastructure installation and #End of entries by OFSAA Infrastructure installation.
3. Delete the OFSAA install directory created by the OFSAAI installer.
4. Perform the OFSAAI installation again.

*Does OFSAA support any other web server types, other than the ones stated in tech matrix and installation guide?*

No, all the supported softwares and versions are stated in the OFSAA Technology Stack Matrices.

*What should I do if the database connection from connection pool displays the following error message, "java.sql.SQLRecoverableException: IO Error: Connection reset"?*

This happens while running several database intensive tasks in parallel. To correct this error, add the line `securerandom.source=file:/dev/./urandom` in the `java.security` configuration file available in `$JAVA_HOME/jre/lib/security/` path.

---

**Note:** This needs to be configured on all the machines or VMs where the OFSAAI components are installed.

---

If the issue is not resolved even with the above settings, check the MTU(Maximum Transmission Unit) settings on the linux box. For details on MTU settings and updating them, contact your system Administrator.

*What should I do when I get syntax errors/file not found error messages while invoking setup.sh file from my install archive?*

This could mostly happen:

- When installer was not unzipped rightly or corrupted during unzip.
- setup.sh file which resides within the install archive was not transferred in ASCII or text mode, which could have corrupted the file.

To correct this, follow the steps:

1. Copy the installer (in BINARY mode) to the system on which the OFSAA Infrastructure components will be installed.
2. Unzip the installer using the command:  

```
unzip <OFSAAI_Installer>.zip
```
3. The corrupted setup.sh file would have introduced certain ^M characters into the file. You can remove ^M characters from setup.sh file by following the below steps:
  - a. Login to the server where the installer is copied.
  - b. Navigate to the directory OFSAAI\_80000.
  - c. Open the setup.sh file in the vi editor using the command: vi setup.sh.
  - d. Inside vi editor in Esc mode, type: %s/^M//g

---



---

**Note:** To enter ^M, hold the CTRL key then press V and M in succession.

---



---

- e. Save the setup.sh file by typing: wq!

***Does OFSAA support Oracle DB 11g Standard edition?***

The OCI client and the jdbc driver does not change depending on whether it is a standard or enterprise edition. So, OFSAAI will work with standard edition as well.

We do not recommend standard edition because it will not scale and does not support partition pack, database security vault, or advanced analytics.

***What should I do if I get the following error message while executing .!startofsaai.sh file on the UNIX System terminal ".!startofsaai.sh: ljava: Execute permission denied"?***

- Ensure JAVA\_BIN environment variable path is set on the "unix user" terminal from where the ./startofsaai.sh file is invoked.
- Ensure the .profile where the environment/ path settings are made has been executed successfully.

***What should I do if the OFSAAI Login page does not open and I get the following error message, "Could not retrieve list of locales"?***

This could be due to 2 reasons:

- System is unable to resolve the hostname configured.
- Conflict with the ports configured.

To correct them, follow the below steps:

A. Steps to replace the hostnames with IP address:

1. Stop all the OFSAA services. For more information, see [Stopping Infrastructure Services](#).
2. Replace all the hostnames with the IP address in all the places mentioned in the document (Where to find port, IP address, HTTPS Configuration for OFSAAI 7.2 Installation (DOC ID [1500479.1](#))).

3. Restart all the OFSAAI services. For more information, see [Starting Infrastructure Services](#) section.
- B. Steps to correct the port number conflicts
1. Stop all the OFSAA services.
  2. See the port numbers stated in the document (Where to find port, IP address, HTTPS Configuration for OFSAAI 7.2 Installation (DOC ID [1500479.1](#))) and check on the discrepancy in the port numbers and correct them.
  3. Restart all the OFSAAI services.

*What happens when the OFSAAI Application Server does not proceed even after providing the system password?*

Ensure that, the System Password provided when prompted should match with the "Oracle Configuration password" provided during installation. Also check whether the connection to the "configuration schema" can be established through sqlplus.

*Although the OFSAAI installation has completed successfully, when OFSAAI servers are started, and the application URL is accessed, it gives an error message "the page cannot be found or displayed" or "Could not retrieve list of languages from Server. Please contact the system administrator". What should one do?*

Ensure OFSAAI servers have been started and are running successfully. On the server start up parameters options, see [Starting Infrastructure Services](#) section.

For more details on the issue, see the Revappserver log in `$FIC_APP_HOME/common/FICServer/logs` directory or the Web server log files.

**Is it necessary to provide the specified grants to the Oracle schema user before installation? If yes, can it be revoked after completing the installation?**

The "Oracle schema" user requires the necessary grants specified before, during, and after the installation process. Grants provided should never be revoked as the application makes use of these grants all the time.

*Can we have distributed OFSAAI Application Server for load balancing?*

OFSAAI Application server can be scaled out/distributed across different JVM's (machines) based on the various services and Information Domains, in other words, Load balancing could be achieved with distribution of services.

*Why do we need Ftpshare on all the layers? Can we have ftpshare on another machine other than the machines where OFSAAI is installed?*

Ftpshare is a Metadata Repository directory. All the metadata related files used in Infrastructure are stored in the ftpshare directory. The ftpshare contains folders for each Information Domain, with each Information Domain folders holding Erwin, log, and scripts folder. The transfer of data among the Web, Application, and Database servers in Infrastructure takes place through FTP/SFTP.

You need to configure FTP/SFTP and enable communication between the servers by providing App server's FTP/SFTP credentials to the Web server and DB server users.

Yes, we can have ftpshare on another machine other than the machines where OFSAAI is installed.

*Is it mandatory to provide the ftp/sftp password?*

Yes, OFSAAI needs credentials of the user which has complete permissions on ftpshare directory, and should be able to independently login to the unix server.

***What are the permissions required for ftpshare and when should I give them?***

It is recommended to provide permissions on ftpshare in case of installations done across different machines or VMs (multitier installation).

In case of single tier installation, 770 permissions can be provided if the unix users of OFSAAI and web server belong to the same unix group.

And on any new file that is created in the 'ftpsahre' folder of any installation layer should be granted specific/explicit permission.

Port Change utility could be used to have the Port number modified, which are currently being used by the Infrastructure application. For more information, see [Changing IP/ Hostname, Ports, Deployed Paths of the OFSAA Instance](#) section.

***Are there any in-built system administration users within OFSAAI Application?***

The three in-built system administration users are provided to configure and setup OFSAAI.

- SYSADMN
- SYSAUTH
- GUEST

***Does OFSAAI Application support both FTP and SFTP?***

OFSAAI supports both FTP and SFTP configuration.

***Is it necessary to enable the FTP/SFTP services to use the OFSAAI?***

Yes, enabling of FTP/SFTP services and its ports is a pre-requisite step towards using the OFSAAI.

***OFSAAI Configuration: Unable to save the server details?***

- Ensure the input User ID, Password, and Share Name are correct.
- Ensure FTP/SFTP services are enabled.
- Have a test FTP/SFTP connection made and confirm if they are successful.

***What should I do if I get the following message while creating Information Domain, "Please create a database and then create the information domain"?***

Information Domain is mapped to only one Database; and thus before the creation of Information Domain, at least one database details would need to exist.

***What should I do if I get the following message during startup of backend engine message server, "ConnectToDatabase: FatalError, could not connect to the DB server"?***

Verify whether connection to the "configuration schema" can be established through sqlplus.

- Verify "configuration schema" password is modified post installation.
- Ensure oracle database alias name created for oracle instance and oracle service name are same.
- On a multi tier Installation mode, ensure TNSNAME and SID are the same in both the Application and Database Layers.

***What should I do if I get the following message during the startup of backend engine message server, "Fatal Error, failed to get user ID from LibSmsConnect"?***

Ensure Reveleus.sec file exist under the \$FIC\_HOME/conf directory where the Database components are installed.



***Does OFSAAI Application support LDAP authentication?***

OFSAAI supports LDAP configuration and authentication.

***Does OFSAAI support multiple languages?***

Yes, OFSAAI supports multiple languages.

***Does OFSAAI provide any data back-up features?***

OFSAAI does not have built-in back up facility. External Storage Infrastructure is recommended for back-up.

***What kind of security features does the OFSAAI provide?***

OFSAAI provides security at:

- Segment Level - Users can access only the segment they are mapped to.
- Application Level - Users can perform an operation only if mapped to appropriate role and functions.

***Does OFSAAI have the ability to enforce periodic password change?***

OFSAAI provides configurable parameters to define number of days after which the user password would expire and then the user is forced to change the password after expiration period.

***What is the password policy followed in OFSAAI?***

OFSAAI enforces a minimum password length with a combination of Upper and Lower case characters and alpha-numeric strings.

***Which version of Erwin Data Modeler does OFSAAI support?***

OFSAAI framework supports Data Modeler Erwin versions 9.0, 9.2, 9.6, and 9.7 for backward compatibility. However, the data models shipped with version 8.0.7.0.0 of the application packs are compatible with Erwin 9.5, 9.64, and 9.7.

***Does OFSAAI provide the mechanism to upload Business Data model?***

OFSAAI provides two mechanisms for business data model upload:

- Easy to use GUI based Model upload mechanism to upload the Business Data Model through Unified Metadata Manager --> Import Model.
- OFSAAI also provides a model upload utility "upload.sh" for uploading the business data model through the command line parameter by executing this shell script file under the path <FIC\_HOME>/ficapp/common/FICServer/bin.

See the section ***Run Model Upload Utility*** of the OFS Analytical Applications Infrastructure User Guide available on [OTN](#) for details.

***How do I apply incremental change to the existing model when the Business Data model undergoes a change?***

Modified data model can be uploaded into the system and OFSAAI has the ability to compare the changes within the data model with respect to the one already present in the system and enables propagation of incremental changes in a consistent manner.

***What are the different types of uploading a business data Model?***

OFSAAI supports uploading of business data model from client desktop and also by picking up the data model from the server location.

***Can the OFSAAI "Configuration Schema" password be modified post installation?***

The OFSAAI "configuration schema" password can be modified post installation. OFSAAI application stores the password in the database and few configuration files, thus any changes to the "configuration schema" password would necessitate updating in these. Contact OFSAAI support for more details.

*Can the OFSAAI "Atomic Schema" password be modified?*

The OFSAAI "Atomic Schema" password can be modified. OFSAAI application stores the atomic schema password in the database and few configuration files, thus any change to the atomic schema password would necessitate updating the password.

To change the Atomic Schema password, follow the steps:

1. Login to OFSAA.
2. Navigate to System Configuration > Database Details window. Select the appropriate connection, provide the modified password and save.
3. Navigate to Unified Metadata Manager > Technical Metadata> Data Integrator > Define Sources window. Update the appropriate Source details.
  - a. If you are using Apache Tomcat as Web server:
    - \* Update the <Context> -> Resource tag details in `server.xml` file from the `$_CATALINA_HOME/conf` folder. (In case of Tomcat only Atomic <Resource> will exist).
  - b. If you are using WebSphere as Web server:
    - \* Login to the WebSphere Administration Console from the left side menu.
    - \* Navigate to Resources > JDBC > Data Sources. A list of data sources will be populated on the right side.
    - \* Select the appropriate Data Source and edit the connection details. (In this case, both Config and Atomic data sources need to be modified).
  - c. If you are using WebLogic as Web server:
    - \* Login to the WebLogic Administration Console from the left side menu.
    - \* Under Domain Structure list box, expand the appropriate Domain and navigate to Services > JDBC > Data Sources. A list of data sources will be populated on the right side.
    - \* Select the appropriate Data Source and edit the connection details. (In this case, both Config and Atomic data sources need to be modified).
4. Restart the OFSAAI services

---

---

**Note:** If the modified passwords are not updated, OFSAAI logs displays the message ORA-28000: the account is locked.

---

---

*Does the upload of Business Data model depend on Java Memory?*

Business data model upload through OFSAAI depends on the Java memory settings on the client and server machines. Java memory setting varies with the data model size and the available RAM. Contact OFSAAI support for more details.

*Why do the Business Metadata Management screens (Business Processors screen) in the User Interface, take more time to load than other screens?*

The Log file in `DynamicServices.xml` which resides in `$FIC_HOME/conf` is continuously being updated/refreshed to cache metadata. This can be observed when you are starting `startofsaai.sh` and if any of the log file (Ex: `SMSService.log`) in `DynamicServices.xml` is being continuously refreshed for longer time.

By default, the Metadata Log file cache size is set to 1000. If in case the log is being updated beyond this limit, retrospectively the preceding entries are overwritten. For example, the 1001th entry is overwritten by deleting the first entry. This results in the application screen taking a longer time to load.

Increase the cache size limit in `Dynamicservices.xml` located at `<FIC_HOME>/conf`, depending on the currently logged count for the specific metadata.

1. Generate the Log report by executing the below query in config schema.

```
select count(1), t.metadata_name, m.dsn_id
from metadata_master m, metadata_type_master t
where m.metadata_type = t.metadata_type
group by t.metadata_name, m.dsn_id
```

2. The above query returns a list of codes with their respective metadata count. You can see "metadata\_type\_master" table to identify the metadata name.
3. View the log report to identify the metadata which is being updated/refreshed beyond the specified cache size limit. Accordingly increase the cache size limit in `Dynamicservices.xml` depending on the currently logged count for the specific metadata.

For example, if the "MEASURE\_CACHE\_SIZE" is set to 1000 and total measure reported in log is 1022, increase the limit to 2000 (approximately).

4. Restart Reveleus/OFSAAI servers (Web and APP) and check the issue.

#### *What should I do if I get OutOfMemoryError while deploying EAR file in WebSphere application server?*

The Java memory needs to be increased in `ejbdeploy.sh` file which is present under `<WebSphere Install directory>/AppServer/deploytool/itp`. For example,

```
$JAVA_CMD \  
-Xbootclasspath/a:$ejbd_bootpath \  
Xms256m -Xmx1024m \  

```

#### *What configurations should I ensure if my data model size is greater than 2GB?*

In order to upload data model of size greater than 2GB in OFSAAI Unified Metadata Manager- Import Model, you need to configure the required model size in `struts.xml` file available in the path `$FIC_WEB_HOME/webroot/WEB-INF/classes`.

---

**Note:** The size requirements have to be always specified in bytes.

---

For example, if you need to configure for model size of 2.5GB, then you can approximately set the max size to 3GB (3221225472 bytes) as indicated below, in order to avoid size constraints during model upload.

```
<constant name="struts.multipart.maxSize" value="3221225472"/>
```

After configuring `struts.xml` file, generate the application EAR/WAR file and redeploy the application onto your configured web application server. For more information on generating and deploying EAR / WAR file, see [Appendix D](#).

**What should I do if my Hierarchy filter is not reflecting correctly after I make changes to the underlying Hierarchy?**

In some cases, the Hierarchy Filters do not save the edits correctly if the underlying Hierarchy has been changed. This can occur in hierarchy maintenance, where you have moved a member to another hierarchy branch, and that member was explicitly selected in the Filter and is now a child of a node which is already selected in the Filter.

See [Support Note](#) for the workaround.

**Can I install an Applications Pack on an existing Atomic schema/ Information Domain created manually?**

No, you cannot install an Applications Pack on existing Atomic schema/Information Domain created manually. Applications Packs can be installed only on Atomic Schemas/Information Domain created using schema creator utility and/ or the Applications Pack installer.

**What should I do if I get the following exception while trying to view the model outputs in Model Outputs screen, "Exception ->Local Path/STAGE/Output file name (No such file or directory)"?**

Ensure you have created a folder "STAGE" under the path mentioned as "Local Path" in the web server details screen. This folder needs to be created under the local path on every node, in case of web application server clustering.

**What should I do if I get the following exception during OFSAA services startup, "Exception in thread "main" java.lang.UnsatisfiedLinkError: net (Not a directory)"?**

Ensure the JRE referred in .profile is not a symbolic link. Correct the path reference to point to a physical JRE installed.

**What is the optimized memory settings required for "New" model upload?**

The following table lists the optimized memory settings required for "New" model upload.

**Table T-1 Optimized Memory Settings for New Model Upload**

Model Upload Options	Size of Data Model XML File	X_ARGS_APP ENV Variable in OFSAAI APP Layer
Pick from Server	106 MB	"-Xms1024m -Xmx1024m
	36 MB	"-Xms2048m -Xmx2048m
	815 MB	"-Xms4096m -Xmx4096m
	1243 MB	"-Xms6144m -Xmx6144m

**Table T-1 Optimized Memory Settings for New Model Upload**

<b>Model Upload Options</b>	<b>Size of Data Model XML File</b>	<b>X_ARGS_APP ENV Variable in OFSAAI APP Layer</b>
Model Upload Utility	106 MB	"-Xms1024m -Xmx1024m"-Xms2048 m -Xmx2048m
	336 MB	"-Xms4096m -Xmx4096m
	815 MB	"-Xms4096m -Xmx4096m
	1243 MB	"-Xms6144m -Xmx6144m
Save New Erwin File In Server	106 MB	"-Xms1024m -Xmx1024m
	336 MB	"-Xms2048m -Xmx2048m
		"-Xms4096m -Xmx4096m
		"-Xms6144m -Xmx6144m

*I did not enable OFS Inline Processing Engine Application license during the installation. However, I have enabled it post installation, using the Manage OFSAA Product License(s) in the Admin UI. Are there any other additional configurations that I need to do?*

Yes. Follow the instructions explained in the OFS Inline Processing Engine Configuration Guide available on [OTN](#).

*I get an error when I try to build an Oracle OLAP cube. What should I do?*

Execute the below grant on the appropriate ATOMIC schema  
grant olap\_user to &database\_username

*How do you turn off unused Information Domains (Infodoms) from caching?*

Follow these steps to turn off unused infodoms from caching:

1. Navigate to \$FIC\_HOME/conf in the APP layer of your OFSAAI installation.
2. In the DynamicServices.xml file, identify the section for <Service code="20">.
3. Modify the value of parameter CACHE\_ON\_STARTUP to 0 (default is 1).

Repeat the same in the WEB layer too. Generate the application EAR/WAR file and redeploy the application onto your configured web application server. For more information on generating and deploying EAR / WAR file, see [Appendix D](#).

4. Restart the OFSAAI Services (APP and WEB). For more information, see the [Starting / Stopping Infrastructure Services](#). section

---

**Note:** This setting helps cache the Infodom metadata only for the infodoms that get accessed after user login. Infodoms which are not accessed, are not cached.

---

Sample code is as follows:

```

<SERVICE CODE="20"
CLASS="com.iflex.fic.metadata.services.MetadataServiceProvider" NAME="BMD"
SERVERID="DEFAULT" PATH=" " LOGGERNAME="UMMLOGGER" LOGGERLEVEL="10">
<PARAMETERS>
<PARAMETER NAME="CACHE_ON_STARTUP" VALUE="0" />
<PARAMETER NAME="BACKUP_XML" VALUE="1" />
<PARAMETER NAME="MAX_BACKUP_XML" VALUE="2" />
<PARAMETER NAME="PC_NONBI_BI_SWITCH" VALUE="2048" />
<PARAMETER NAME="HIERARCHY_NODE_LIMIT" VALUE="2000" />
<PARAMETER NAME="ALIAS_CACHE_SIZE" VALUE="1000" />
<PARAMETER NAME="DATASET_CACHE_SIZE" VALUE="2000" />
<PARAMETER NAME="MEASURE_CACHE_SIZE" VALUE="2000" />
<PARAMETER NAME="HIERARCHY_CACHE_SIZE" VALUE="2000" />
<PARAMETER NAME="DIMENSION_CACHE_SIZE" VALUE="2000" />
<PARAMETER NAME="HIERARCHYATTRIBUTE_CACHE_SIZE" VALUE="1000" />
<PARAMETER NAME="CUBE_CACHE_SIZE" VALUE="1000" />
<PARAMETER NAME="RDM_CACHE_SIZE" VALUE="1000" />
<PARAMETER NAME="BUSINESSPROCESSOR_CACHE_SIZE" VALUE="2000" />
<PARAMETER NAME="DERIVEDENTITY_CACHE_SIZE" VALUE="1000" />
<PARAMETER NAME="LOG_GET_METADATA" VALUE="false" />
<PARAMETER NAME="METADATA_PARALLEL_CACHING" VALUE="0" />
</PARAMETERS>
</SERVICE>

```

***While creating an Excel Mapping, after specifying the excel worksheet, the target table, and mapping each column in the worksheet to a target table, I click SAVE and nothing happens. But when I click CANCEL, a message pops up informing me that all changes will be discarded”, what is to be done?***

Check if the excel mapping creation is done using I.E 8 with JRE 1.4 plug in enabled on machine. If so, upgrade the JRE plug in to 1.7+.

***Can Multiple OFSAA Infrastructure instances share the same config schema?***

No, only one OFSAA environment can be installed using one config schema.

***Can Atomic schema be shared?***

Yes, it can be shared between two OFSAA instances.

***While setting a firewall, which ports should be opened for communication between the Web server (Apache HTTP Server/ Oracle HTTP Server/ IBM HTTP Server) and the Web application server (WebSphere/ WebLogic/ Tomcat) for OFSAAI to operate properly?***

The OFSAA Servlet port which is same as Web server port should be open. Also the web application port should be open.

*Can I modify the NLS\_LENGTH\_SEMANTICS to BYTE from CHAR for the Database where older versions of OFSAA is Installed?*

Yes, NLS\_LENGTH\_SEMANTICS can be modified to BYTE from CHAR if you are not intending to use multi language support.

*Can I install already installed application in a different infodoms?*

No, it is not possible to install the same application in two different infodoms.

*How can I configure the OFSAA application for High Availability?*

OFSAA can have active-passive high availability. For more details, see [Configuring OFSAA in Clustered Environment Guide](#).

*During OFSAA installation should I provide web application server's IP /Hostname and port or web server's IP/Hostname and port, if the Apache HTTP Server/ Oracle HTTP Server/ IBM HTTP Server are configured?*

In case the web server is configured, you should enter the Web server IP Address/Hostname and Port details during OFSAA installation. Here the Servlet port should be same as the Web server port.fl

If Web server is not configured, the Web application server's IP Address/ Hostname and Port is required during the installation process. Here the Servlet port should be same as the Web application Server port.

*Is "ReveleusAdminConsoleAgent" applicable for OFSAAI 8.0.0.0.0 and higher versions?*

No, ReveleusAdminConsoleAgent is not applicable starting OFSAAI 7.3.3.0.0. There is a change in the way agentservers are managed through AGENTSTARTUP . SH & AGENTSHUTDOWN . SH.

*What should I do when the message server process does not open and I get the following error message, "CI18NProvider::CI18NProvider, Error, unable to connect to the config database"?*

This error is displayed due to the following reasons:

- The Config Schema password is already expired.
- If the config schema password is going to expire soon and the message such as flfl"ORA-28002: the passwordflwill expire within 6 days" displays while connecting to config schema through sqlplus.
- The Config schema password is Modified.

flflTo resolve the error, re-set the config schema password to the old password. Else, if the config schema password is modified to something else then follow the below steps:

1. Delete the \$FIC\_HOME/conf/Reveleus.SEC file.
2. Shutdown the OFSAAI App service: cd \$FIC\_APP\_HOME/common/FICServer/bin ./stopofsaai.sh
3. Shutdown the OFSAAI App service: cd \$FIC\_APP\_HOME/common/FICServer/bin ./stopofsaai.sh
4. Start the Infrastructure Server in foreground directly on the server or through XWindows software using the command: ./startofsaai.sh
5. Enter System Password.

6. Enter the new Config schema password. The service starts and initializes if it is able to successfully connect to the DB and generates the `Reveleus.SEC` file.
7. Post successful startup of the service, if required, the Infrastructure server may be shut down and restarted in the background using `nohup` mode.

#### *What is the mechanism of Log File sizing and backup?*

OFSAAI Log files created under `$FIC_APP_HOME/common/FICServer/logs` & `<OFSAAI_DEPLOYED_AREA>/<CONTEXT.war>/logs` is configurable in `RevLog4jConfig.xml`.

The default size of the log files (`MaxFileSize`) is set to `max 5000kb` & number of max backup log files (`MaxBackupIndex`) retained is set to `5`, both of which are configurable. Increasing these parameters to a higher value should depend on the server HW configurations and may reduce the performance.

To configure the Logs file size on OFSAA Application server, follow these steps:

1. Navigate to `$FIC_HOME/conf` where OFSAA is installed.
2. Edit the following parameters in the file `RevLog4jConfig.xml`
  - `<param name="file"` : Enter the path where the Logs are to be generated.
  - `<param name="MaxFileSize"` : Provide the required file size.
  - `<param name="MaxBackupIndex"` : Provide the required number of backup files to be created.

#### *Example:*

```
<appender name="REVSERAPPENDER"
class="org.apache.log4j.RollingFileAppender">
<param name="file" value="$FIC_
HOME/ficapp/common/FICServer/logs/RevAppserver.log"/>
<param name="Append" value="true" />
<param name="MaxFileSize" value="5000kb" />
<param name="MaxBackupIndex" value="5" />
<layout class="org.apache.log4j.PatternLayout">
<param name="ConversionPattern" value="[REVELEUSLOG] %m%n"/>
</layout>
</appender>
```

To configure the Deployed area logs file, follow these steps:

1. Navigate to `<EAR/WAR Deploy area>/conf` folder.
2. Repeat step 2 from the above section.

#### *Can we modify the Log file path?*

Yes, Log file path is configurable, it can be configured in `RevLog4jConfig.xml`. default log file path (`file`) is set by the installer. This can be configured to another path.

#### *Can I point the environment with HTTP enabled to HTTPS after installation and vice versa?*

For more details, see the HTTPS section in the OFSAAI Administration Guide.

#### *What should I do if the sliced data model upload takes a long time to complete?*



If the metadata cache size is set to a lower value than the actual count of each metadata type (hierarchy, dataset, dimension etc), then it gets into performance degrade issues. We have to increase the cache size for each metadata type according to the count in the environment.

Following are the parameters in DynamicServices.xml to be configured depends on the metadata count in your environment.

```
<PARAMETER NAME="HIERARCHY_NODE_LIMIT" VALUE="2000"/>
  <PARAMETER NAME="ALIAS_CACHE_SIZE" VALUE="1000"/>
<PARAMETER NAME="DATASET_CACHE_SIZE" VALUE="2000"/>
  <PARAMETER NAME="MEASURE_
CACHE_SIZE" VALUE="3000"/>
<PARAMETER NAME="HIERARCHY_
CACHE_SIZE" VALUE="2000"/>
<PARAMETER NAME="DIMENSION_
CACHE_SIZE" VALUE="2000"/>
<PARAMETER NAME="CUBE_CACHE_SIZE" VALUE="1000"/>
<PARAMETER NAME="BUSINESSPROCESSOR_CACHE_SIZE"
VALUE="2000"/>
<PARAMETER NAME="DERIVEDENTIT
Y_CACHE_SIZE" VALUE="1000"/>
```

Metadata count can be derived based on the following queries:

```
select count(1) from metadata_master where metadata_version=0 --- for all
metadata select count(1) from metadata_master where metadata_version=0
and metadata_type=1 --- for measure

select count(1) from metadata_master where metadata_version=0 and
metadata_
type=2 --- for Dimension

select count(1) from metadata_master where metadata_version=0 and
metadata_
type=3 --- for HCY

select count(1) from metadata_master where metadata_version=0 and
metadata_
type=4 --- for DATASET

select count(1) from metadata_master wh
ere metadata_version=0 and metadata_
type=59 --- for BP's

select count(1) from metadata_master wh
ere metadata_version=0 and metadata_
type=54 --- for Alias

select count(1) from metadata_master wh
```

```
ere metadata_version=0 and metadata_
type=5 --- for CUBES
select count(1) from metadata_master wh
ere metadata_version=0 and metadata_
type=856 --- for Derived Entit
```

***For LDAP authentication, which server connects with the LDAP server, the Application server (where ofsaai is installed), or Web Application server (where EAR is deployed)?***

For LDAP authentication, the Application server (ficapp) connects with the LDAP server.

***The LDAP server in the setup listens on secure protocol ldaps (port 636). I have the root certificate of the LDAP server for SSL, and would like to know where to offload this certificate?***

You need to import the certificate into the JDK/JVM used by Reveleus server in ficapp layer.

***How to relocate FTPSHARE folder?***

You can run the PortC.jar utility. For more details, see Changing IP/Hostname, Ports, Deployed Paths of the OFSAA Instance section in the OFSAAI Admin Guide available on [OTN](#).

***How do we identify the list of ports that are used by/configured in an OFSAA environment?***

1. Navigate to \$FIC\_HOME directory on target.

***What should I do if I get the following error message, "Error while fetching open cursor value Status : FAIL"?***

This error occurs while executing envCheck.sh because the user does not have access to V\$parameter. This error does not occur due to sysdba or non sysdba privileges provided they have access/grants to V\$parameter.

## Applications Pack 8.0.7.0.0 FAQs

***What is an Applications Pack?***

An Applications Pack is suite of products. For more information, see [About OFSAA Infrastructure](#).

***Can I get a standalone installer for OFSAAI 8.0?***

No. AAI is part of every Applications Pack and installs automatically.

***How does OFSAA 8.0 Applications Pack relate to OFSAA 7.x series?***

8.0 is a new major release consolidating all products from OFSAA product suite.

***Can existing OFSAA 7.x customers upgrade to OFSAA 8.0 Applications Pack?***

There is no upgrade path available. However, we will have migration kit / path for every product to 8.0 Applications Pack. Further details will be available with Oracle Support Services.

***Does OFSAA 8.0 Applications Pack UPGRADE automatically to existing environments?***

No. OFSAA 8.0 Applications Pack has to be installed in a new environment and subsequently migration path / migration kit needs to be run to migrate from 7.x to 8.0. Note that the objects can be migrated only from the previously released version of OFSAA products.

***Where can I download OFSAA 8.0 Applications Pack?***

You can download the OFSAAI 8.0 Applications Pack from [Oracle Software Delivery Cloud](#) (OSDC).

***What are the minimum system and software requirements for OFSAA 8.0 Applications Pack?***

See installation guide section [Hardware and Software Requirements](#).

***Is my environment compatible with OFSAA 8.0 Applications Pack?***

Environment Check utility performs the task. It is part of install and can also be run separately.

***Does the OFSAA 8.0.7.0.0 Applications Pack support all Operating systems?***

OFSAA 8.0.7.0.0 Applications Pack supports the following Operating Systems: LINUX, AIX, SOLARIS. See [Technology Matrix](#) for the technology matrix that OFSAA suite products are/ will be qualified on.

***How can I install OFSAA 8.0.78.0.7.0.0 Applications Pack?***

See Oracle Financial Services Advanced Analytical Infrastructure Installation And Configuration Guide published in [OTN](#) for the Applications Pack installers.

***Does this installation require any Third party Softwares?***

Oracle Financial Services Advanced Analytical Infrastructure Installation And Configuration Guide published in [OTN](#) lists the third party software that needs to be installed.

***What languages are supported during OFSAA 8.0.7.0.0 Applications Pack installation?***

US English is the language supported.

***What mode of installations OFSAA Applications Pack supports?***

OFSAA Applications Packs supports Silent Mode.

***Does OFSAA 8.0.7.0.0 Applications Pack support Multi tier Installations?***

OFSAA 8.0.7.0.0 supports only single tier installation. For more information see [OFSAAI FAQs](#) section.

***Does this Applications Pack validate all Pre-requisites required for this installation i.e., Memory, Disk Space etc.?***

Yes. The pre-requisite checks are done by the respective Applications Pack installer.

***What happens if it aborts during installation of any application with in Applications Pack?***

You must restore the system and retrigger the installation

***Does this Applications Pack 'Roll Back' if any application installation fails due to errors?***

Rollback of installation is not supported.

***Does the Applications Pack install all applications bundled?***

All Applications Pack system files are installed but there is an option to enable the licensed products.

***Can I re-install any of the Applications Packs?***

You can retrigger in case of failure.

***Does this Applications Pack allow enabling / disabling any of the applications installed?***

Yes. You cannot disable once the product is enabled in an environment.

***I have installed one application in an Applications Pack, can I install any of new application within the Applications Pack later?***

No, installation of additional applications is not required. If you wish to add an application later, you can enable the application at that time.

***How many OFSAA Infrastructures can be installed in a single server?***

There is no issue in installing separate OFSAAI installations, each with their own PFT/FTP installations and separate associated database instances and separate Web server installations on the same server as long as adequate memory is allocated for each instance and as long as each OFSAAI installation is installed using a separate UNIX user and profile. Care should be taken if running multiple OFSAAI installations on a single server. Adequate memory will be required for each installation as several OFSAAI processes (model upload, DEFQ services, etc) take significant amounts of memory. So it depends on your server memory.

***Is it possible to Install OFSAA 8.0 Applications Pack on an existing 'Infodom' where another OFSAA 8.0 application is installed?***

Yes. However, the Behavioral Detection Applications Pack and Compliance Regulatory Reporting Applications Pack are the exceptions. They need to be installed in a different INFODOM.

***Can I select an Infodom in Applications Pack during installation?***

Yes. You can select or change the required infodom.

***Can I install all Applications Packs in a 'Single Infodom'?***

Yes. But Behavioral Detection Applications Pack and Compliance Regulatory Reporting Applications Pack are the exceptions. They need to be installed in a different INFODOM.

***Is it possible to install applications on different Infodom within the Applications Pack? (For example, I want to install LRM & MR in two infodoms)***

Applications within Applications Pack have to be installed in the same information domain in the same environment.

***How many Infodoms can be created over a single OFSAA Infrastructure of 8.0.7.0.0?***

You can install only one infodom during installation. But after installation, you can create multiple infodoms.

***Is the 'Data Model' bundled specific to an Applications Pack or to an individual application?***

A merged data model for all applications within the Applications Pack is bundled and uploaded.

***Is it possible to install OFS Enterprise Modeling later?***

OFS Enterprise Modeling is a separate product and can be enabled as an option later from any Applications Pack that bundles Enterprise Modeling.

***Does the Applications Pack create sandbox automatically for the required applications?***

Yes, Sandbox creation is part of application install process.

***Are upgrade Kits available for individual applications or the complete Applications Pack?***

Maintenance Level (ML) Release / Minor Release upgrades are available across all applications.

***Can I upgrade AAI only?***

Yes, you can upgrade AAI alone.

***Can I upgrade one application within the Applications Pack? (For example, I want to upgrade LRM in the Treasury Applications Pack, but not MR.)***

No, an upgrade is applied to all applications in the Applications Pack.

***Is it possible to uninstall any Application from the Applications Pack?***

No, it is not possible to uninstall any Application from the Applications Pack.

***Can I uninstall entire Applications Pack?***

No, you cannot uninstall the Applications Pack.

***Is it possible to uninstall only application and retain AAI in the installed environment?***

No, you cannot uninstall only the application and retain AAI in the installed environment.

***Does Applications Pack contain all Language Packs supported?***

Language Packs need to be installed on 8.0 Applications Packs.

***Can I install an Applications Pack over another Applications Pack (that is same infodom or different infodom)?***

Yes, you can install an Applications Pack over another Applications Pack in the same information domain or different information domain. But Behavioral Detection Applications Pack and Compliance Regulatory Reporting Applications Pack, Asset Liability Management Applications Pack and Profitability Applications Pack are the exceptions. They need to be installed in a different INFODOM.

***Can I use an existing manually created schema as information domain for Applications Pack installation?***

No. Schemas required by OFSAA applications have to be created using Schema Creator Utility.

***Does OFSAA 8.0 support on WebLogic 10.3.6 with Oracle 12c?***

Yes, OFSAA 8.0 will support on WebLogic 10.3.6 with Oracle 12c. WebLogic 10.3.6 supports oracle 12c with some additional configurations. See the link [http://docs.oracle.com/cd/E28280\\_01/web.1111/e13737/ds\\_12cdriver.htm#JDBCA655](http://docs.oracle.com/cd/E28280_01/web.1111/e13737/ds_12cdriver.htm#JDBCA655) for additional configurations.

***What should I do if I get the following error message while running the schema creator utility, "HostName in input xml is not matching with the local hostname"?***

One possible reason could be the machine is configured for zonal partitioning. Ensure all the known IP Addresses of the machine are present in the /etc/hosts file.

***What are the Java versions supported in OFS AAAI Applications Pack version 8.0.7.0.0?***

OFS AAAI Applications Pack supports Java 1.7.x and 1.8.x.

***Is OFS AAAI Applications Pack version 8.0.7.0.0 supported on Java 8?***

Yes. To install this release of the OFS AAAI Applications Pack version 8.0.7.0.0 on Java 8. For more information, see specific notes mentioned in the sections [Installer and Installation Prerequisites](#), [Configurations supported for Java 8](#), [Configuring and Executing Schema Creator Utility](#), [Installing in Silent Mode](#).

***What should I do when I get "[ERROR] - Error : APP Setup bin file failed." message during OFS\_Application\_PACK installation?***

This is a generic error message that appears during application installation failure. You should check the installation log files for more information about what failed the installation.

However, if the message is displayed and the log files are not generated, it could be that it is a temp directory issue. The resolution is that your UNIX administrator has to disable the NOEXEC option. The installers extract the installation files into the /tmp directory, and if NOEXEC is enabled, execution of binaries will not happen in the directory and the installation fails. Re-run the installer after the configuration is changed. For detailed information, see the support note at <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2340045.1>.

## Forms Framework FAQs

***What should I do when I have large volume of data to be exported?***

It is recommended to use BIP reports or OBIEE reports if you have to export large volume of data.

***How do I export the columns added to the grid using Field Chooser option?***

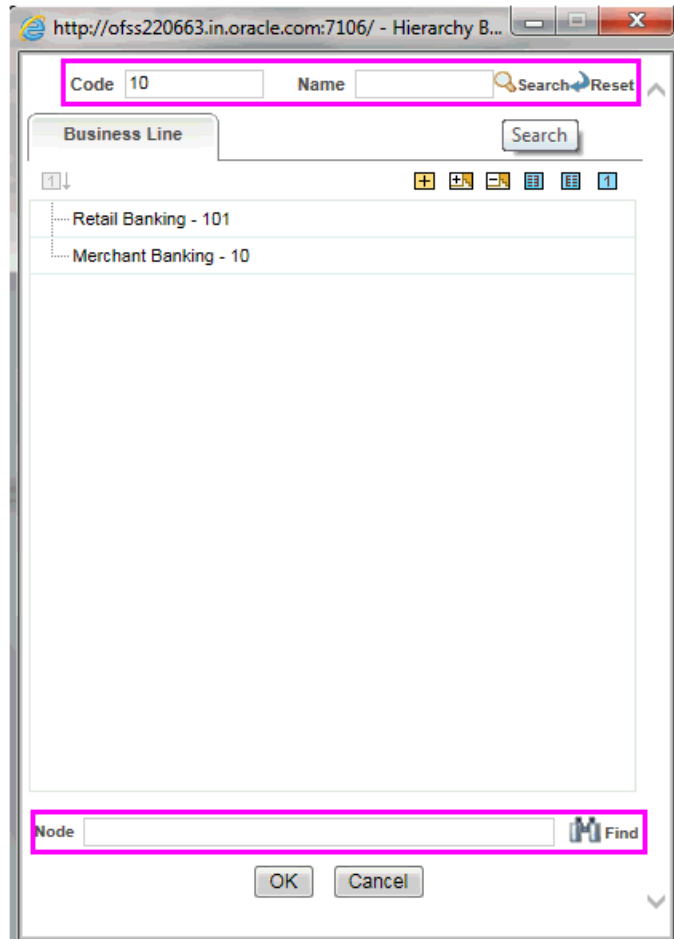
Perform Grid Export operation to export the columns added to the grid by Field Chooser option.

***'Expand All/ Collapse All' button is not visible in the Hierarchy Browser window. What should I do?***

Expand All/ Collapse All button is enabled only if the number of hierarchy nodes is less than 50. If it is more than that, it is considered as large hierarchy and the data will be fetched dynamically when you expand each node.

***What is the difference between the two Searches available in the Hierarchy Browser window?***

In the new *Hierarchy Browser* window introduced from 7.3.5.1.0 version, there are 2 search options available as highlighted in the following figure:



- **DB Search (Top search container):** It will search the required node in database and displays the result as shown below. This search is performed on full hierarchy nodes.
- **UI search (Below the hierarchy):** This search will find the required node in the UI and will show in tree structure.

**Note:** In case hierarchy nodes are more than 50 and if it is a non-custom hierarchy, then the UI search will not show the required node in tree structure, until all the nodes are expanded and loaded manually in the UI.

#### *What is a Custom Hierarchy?*

Custom hierarchies will be having the parameter configuration customQuery as shown below and the customized query will be taken from the HIERARCHY\_FILTER\_MASTER table.

Configuration in xml:

```
<CONTROL ID="1003" TYPE="41">
<CONTROLPROPS>
    <EXTRAPARAMETERS>
<PARAMETER NAME="customQuery" VALUE="Yes" />
```

```
</EXTRAPARAMETERS>
</CONTROLPROPS>
</CONTROL>
```

For custom hierarchy, all the hierarchy nodes are loaded in UI without any limit.

So, even if the hierarchy nodes are more than 50, the UI search will show the required node in tree structure and ExpandAll and ExpandBranch images will be enabled.

## Error Dictionary

This contents of this section has been created with the interest to help you resolve the installation issues if any. There is a compilation of all the possible errors that might arise during the installation process with the possible cause and the resolution to quickly fix the issue and proceed further with the installation.

This section includes the following topics:

- [Accessing Error Dictionary](#)
- [Error Code Dictionary](#)

## Accessing Error Dictionary

Instead of scrolling through the document to find the error code, you can use the pdf search functionality. In the "Find" dialog available in any of the Adobe Acrobat version that you are using to view the pdf document, follow the below instructions to quickly find the error resolution.

1. With the Installation pdf open, press **Ctrl+F** or select **Edit > Find**.
2. The *Find* dialog is displayed as indicated.
3. Enter the error code that is displayed on screen during Infrastructure installation.
4. Press **Enter**. The search results are displayed and highlighted as indicated below.

**Figure T-1 Error Code**

Error code - OFSAAI-1003	
<b>Cause</b>	JAVA_HOME/bin not found in PATH variable.
<b>Resolution</b>	Import <JAVA_HOME>/bin into PATH variable. Example: PATH = \$JAVA_HOME/bin \$PATH export PATH.

View the details of the issues, its cause, and resolution specific to the error code. Repeat the step to find an answer to any other errors that you notice during installation. If you are not able to resolve the issue even after following the steps provided in resolution, you can contact [support.oracle.com](http://support.oracle.com) along with log files and appropriate screen shots.



## Error Code Dictionary

### Error code - OFSAAI-1001

**Table T-2 Error code - OFSAAI-1001**

<b>Cause</b>	Unix shell is not "korn" shell.
<b>Resolution</b>	Change the shell type to "korn". Use chsh unix command to change SHELL type. Shell type can also be changed by specifying shell path for the Unix user in /etc/passwd file. Note: chsh command is not available in Solaris OS.

### Error code - OFSAAI-1002

**Table T-3 Error code - OFSAAI-1002**

<b>Cause</b>	No proper arguments are available.
<b>Resolution</b>	Provide proper arguments. Invoke Setup.sh using Silent mode. Example: ./Setup.sh SILENT

### Error code - OFSAAI-1004

**Table T-4 Error code - OFSAAI-1004**

<b>Cause</b>	File .profile is not present in \$HOME.
<b>Resolution</b>	Create .profile in \$HOME, i.e. in the home directory of user.

### Error code - OFSAAI-1005

**Table T-5 Error code - OFSAAI-1005**

<b>Cause</b>	File OFSAAInfrastructure.bin is not present in current folder.
<b>Resolution</b>	Copy OFSAAInfrastructure.bin into installation kit directory.

### Error code - OFSAAI-1006

**Table T-6 Error code - OFSAAI-1006**

<b>Cause</b>	File CustReg.DAT is not present in current folder.
<b>Resolution</b>	Copy CustReg.DAT into installation kit directory.

### Error code - OFSAAI-1007

**Table T-7 Error code - OFSAAI-1007**

<b>Cause</b>	File OFSAAI_InstallConfig.xml is not present in current folder.
<b>Resolution</b>	Copy OFSAAI_InstallConfig.xml into installation kit directory.

**Error code - OFSAAI-1008****Table T-8 Error code - OFSAAI-1008**

<b>Cause</b>	File validateXMLInputs.jar is not present in current folder.
<b>Resolution</b>	Copy validateXMLInputs.jar into installation kit directory.

**Error code - OFSAAI-1009****Table T-9 Error code - OFSAAI-1009**

<b>Cause</b>	File log4j.xml is not present in current folder.
<b>Resolution</b>	Copy log4j.xml into installation kit directory.

**Error code - OFSAAI-1010****Table T-10 Error code - OFSAAI-1010**

<b>Cause</b>	Unknown error occurred.
<b>Resolution</b>	Make sure to provide proper argument (Silent) to the Setup.sh file.

**Error code - OFSAAI-1011****Table T-11 Error code - OFSAAI-1011**

<b>Cause</b>	XML validation failed.
<b>Resolution</b>	Check InfrastructurePreValidations.Log for more details.

**Error code - OFSAAI-1012****Table T-12 Error code - OFSAAI-1012**

<b>Cause</b>	Property file with locale name does not exist.
<b>Resolution</b>	Copy MyResources_en_US.properties to the setup kit directory and keep en_US in LOCALE tag of OFSAAI_InstallConfig.xml.

**Error code - OFSAAI-1013****Table T-13 Error code - OFSAAI-1013**

<b>Cause</b>	File OFSAAI_InstallConfig.xml/OFSAAI_PostInstallConfig.xml not found.
<b>Resolution</b>	Copy OFSAAI_InstallConfig.xml/OFSAAI_PostInstallConfig.xml to the setup kit directory.

**Error code - OFSAAI-1014****Table T-14 Error code - OFSAAI-1014**

<b>Cause</b>	XML node value is blank.
<b>Resolution</b>	Make sure all node values except SMTPSERVER, PROXYHOST, PROXYPORT, PROXYUSERNAME, PROXYPASSWORD, NONPROXYHOST, or RAC_URL are not blank.

## Error code - OFSAAI-1015

**Table T-15 Error code - OFSAAI-1015**

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<b>Cause</b>	XML is not well formed.
<b>Resolution</b>	Execute the command <code>dos2unix OFSAAI_InstallConfig.xml</code> to convert plain text file from DOS/MAC format to UNIX format.  OR  Make sure that <code>OFSAAI_InstallConfig.xml</code> is valid. Try to open the file through Internet Explorer for a quick way to check validity. If it is not getting opened, create new <code>OFSAAI_InstallConfig.xml</code> using the <code>XML_Utility.jar</code> .

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## Error code - OFSAAI-1016

**Table T-16 Error code - OFSAAI-1016**

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<b>Cause</b>	User installation directory contain blank spaces.
<b>Resolution</b>	Provide an installation path that does not contain spaces. Check the tag <code>USER_INSTALL_DIR</code> in <code>OFSAAI_InstallConfig.xml</code> file. This path should not contain any spaces.

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## Error code - OFSAAI-1017

**Table T-17 Error code - OFSAAI-1017**

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<b>Cause</b>	User installation directory is invalid.
<b>Resolution</b>	Provide a valid installation path. Check if you are able to create the directory mentioned in <code>USER_INSTALL_DIR</code> tag value of <code>OFSAAI_InstallConfig.xml</code> file.

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