

# **Oracle Financial Services Enterprise Case Management**

**Installation Guide**

**Release 8.0.7.1.0**

**May 2020**



## OFS Enterprise Case Management Installation Guide

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## Document Control

Version Number	Revision Date	Change Log
1.0	November 2019	Created document to capture OFSECM 8.0.7.1.0 Maintenance Level Release.

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# 1 OFS ECM Release 8.0.7.1.0

OFS ECM 8.0.7.1.0 Maintenance Level (ML) includes all the bug fixes and minor enhancements done since the previous GA (General Availability) release, that is, 8.0.7.0.0.

This ML release of OFS ECM can be installed on a setup with any OFSAA 8.0.7.0.0 Application Pack.

## 1.1 Conventions and Acronyms

Conventions	Description
Screen actions are indicated in Bold	
IR	Interim Release
ML	Maintenance Level Release
OFSAAI	Oracle Financial Services Analytical Applications Infrastructure
OHC	Oracle Help Center
AIX	Advanced Interactive eXecutive
RHEL	Red Hat Enterprise Linux
OEL	Oracle Enterprise Linux
OS	Operating System
EAR / WAR	Enterprise Archive / Web Archive
J2EE	Java 2 Enterprise Edition
OTN	Oracle Technology Network
JCE	Java Cryptography Extension
Atomic Schema	Database schema where the application data model is uploaded.
Configuration Schema	Database schema which contains setup related configurations and metadata.

## 1.2 Pre Installation Requirements

- OFSECM 8.0.7.0.0 (Patch ID 29008204) - OFS ECM APPLICATION PACK V8.0.0.0.0 MINOR RELEASE #7 (8.0.7.0.0)
- OFSAAI 8.0.7.2.0 (Patch ID 29920053) - OFSAA 8.0.7.0.0 AAI ML RELEASE #2 (8.0.7.2.0)
- Apply the one-off patch 30279865 from My Oracle Support <http://support.oracle.com/>.
- For OBIEE
  - Navigate to \$FIC\_HOME/OBIEE/repository
  - Rename the existing FCCM807.rpd to FCCM807\_12C.rpd

Ensure unlimited cryptographic policy for Java is enabled during the installation of OFS AAI 8.0.7.0.0. For more information, see the *Enabling Unlimited Cryptographic Policy* section from the [OFS Analytical Applications Infrastructure Administration Guide](#).

**NOTE** Do not enable unlimited cryptographic policy for Java if the Java versions in OFS AAI and the Web Application servers are higher than 7u171 for Java 7, and 8u161 for Java 8.

## 1.3 How to Apply This Maintenance Level Release?

Refer to the following instructions to install this patch set.

1. Load the .profile and make sure that \$FIC\_HOME corresponds to the proper environment where the patch application is required. Make sure that \$FIC\_SERVER should be up and running.
2. Take a backup of below-mentioned tables from Atomic Schema as a precautionary measure and any customizations done to these tables has to be re-applied.
  - FCC\_CORR\_BUS\_ENTITY\_PATH
  - FCC\_CORRELATION\_BUS\_ENTITY\_CFG
  - FCC\_CORR\_QUERY\_DEFINITION
  - FCC\_SCENARIO\_MASTER
3. Login to <https://support.oracle.com/> and search for 30369816 under the Patches & Updates tab.
4. Download the OFSAA 8.0.7.0.0 ECM ML RELEASE #1 archive file and copy it to your OFSAA server in **Binary** mode.

**NOTE** There are different archive files for different operating systems such as AIX, Solaris, and RHEL/OEL.

5. Login to the OFSAA server as a non-root user.
6. Navigate to <USER\_PATCH\_DIR> and extract the contents of patch archive file using the following command:

```
unzip -a <name of the file to be unzipped>
```

Example:

```
unzip -a 30369816_GENERIC.zip
```

Below are the contents of the folder when the folder is unzipped

- PatchConfig.xml
- install.sh
- Setup.bin
- validateXMLInputs.jar
- Readme\_OFSECM\_8.0.7.1.0.txt

#### NOTE

<USER\_PATCH\_DIR> is the directory containing the <patch>.zip file.

The above "-a" option is mandatory to unzip the patch. In case you notice an error message “unzip: not found [No such file or directory]” when the package is not installed, contact your UNIX administrator to resolve this issue.

7. Navigate to <USER\_PATCH\_DIR>/30369816/bin and grant execute (755) permission for all executables.

```
$ chmod 755 *
```

8. Navigate to <USER\_PATCH\_DIR>/30369816/conf/PatchConfig.xml and provide the below place holder values

- a. ##SCHEMA\_OUT\_XML\_PATH## - This attribute refers to the path which needs to be pointed to OFS\_ECM\_SCHEMA\_OUTPUT.xml which was generated at the time of installation.
- b. ##OFS\_ECM\_DATA\_CM\_TBSP## and ##OFS\_ECM\_IDX\_CM\_TBSP## - This attribute refers to the Data and Index Tablespace Values present in OFS\_ECM\_SCHEMA\_OUTPUT.xml which was generated at the time of installation
- c. ##OFS\_ECM\_AML\_SOURCE## - This attribute refers to the source database in Pr2\_Process\_Task\_Parameter table. Values could be schema name or DB link name
- d. ##OFS\_ECM\_AML\_LOADTYPE## - This attribute refers to DB link Pr2\_Process\_Task\_Parameter. Values could be null or “DBLINK”
- e. ##EXECUTE\_PRE\_AND\_POST\_SCRIPTS## - This attribute refers to prescript, this would be executed before the model upload. Kindly provide the value as 1.

9. Install the patch by executing install.sh command as below

```
$ ./install.sh
```

10. Check if the patch is applied successfully by verifying the patch install logs under <USER\_PATCH\_DIR>/30369816/logs. Contact to Oracle Support in case of any errors.

11. Navigate to #FIC\_HOME#/ficweb/webroot/conf and open the excludeURLList.cfg, check if the following entries are present. If not present, then append the following entry at the end of the file.

```
[SQLIA]/ECMServlet
```

```
[SQLIA]/CMServlet
```

```
[SQLIA]/ECMCacheServlet
```

[ALL]./ScoringRuleServlet

12. Navigate to #FIC\_HOME#/ficweb/webroot/WEB-INF/classes/Reports/Input/Forms path and delete CM\_ACC\_RLM.xml file.

13. Execute the below query in ECM atomic user after replacing the '##CMINFODOM##' with BD infodom.

```
UPDATE FCC_TPG_TABLE_JSON_MAPPING SET EXPRESSION=''##CMINFODOM##''  
WHERE MAPPING_ID='CMMN_GATEWAY_INPUT_ECM' AND KEY = 42
```

/

```
COMMIT
```

/

14. Generate the application EAR/WAR file and redeploy the application onto your configured web application server. For more information on generating and deploying the EAR/ WAR file, see the Post Installation Configurations section in the [Oracle Financial Services Enterprise Case Management Installation & Configuration Guide 8.0.7.0.0](#).
15. Restart all the OFSAAI services. For more information, see the Starting/ Stop Infrastructure Services section in the [Oracle Financial Services Enterprise Case Management Installation & Configuration Guide 8.0.7.0.0](#).



## 2 Post Installation Steps

### 1. Pre steps for date format

- a. For ECM Application, in the CONFIGURATION table for DEFAULT\_DATEFORMAT\_REQ param, PARAMVALUE should be set to TRUE. Run the below update Query in CONFIG Schema and restart the servers:

```
update CONFIGURATION t set t.PARAMVALUE = 'TRUE' where t.paramname = 'DEFAULT_DATEFORMAT_REQ';
```

- b. User-specific date formats can be configured using the Preference screen.

### 2. After successful patch application, execute the following script as part of post installation step in the Atomic Schema, and commit the same.

```
INSERT INTO FCC_EVENT_LOOKUP SELECT * FROM FCC_EVENTS_123;
```

### 3. After verifying the Data is successfully moved in to FCC\_EVENT\_LOOKUP table, table FCC\_EVENTS\_123 can be dropped, this table is created during the patch installation.

```
DROP TABLE FCC_EVENTS_123;
```

### 4. To populate data for Network Structure building Block, add below process as part of the Run.

- BD\_LINKANALYSIS\_LOOKUP: Oracle Behavior Detection to CA LinkAnalysis Lookup
- BD\_LINKANALYSIS\_NETWORK: Oracle Behavior Detection to CA LinkAnalysis Network
- BD\_LINKANALYSIS\_NODE: Oracle Behavior Detection to CA LinkAnalysis Node
- BD\_LINKANALYSIS\_LINK: Oracle Behavior Detection to CA LinkAnalysis Link
- BD\_LINKANALYSIS\_LINKSUMMARY: Oracle Behavior Detection to CA LinkAnalysis LinkSummary
- BD\_LINKANALYSIS\_TYPESUMMARY: Oracle Behavior Detection to CA LinkAnalysis TypeSummary

For more information, see Administration and Configuration Guide on [OHC](#).

#### NOTE

Apply this step only if you want to populate the Network Structure building Block related data, else ignore it.

### 5. Restore the records into the below-mentioned tables from backup tables.

- FCC\_INSTITUTION\_LOOKUP
- FCC\_TRADE\_FIN\_DOC\_EVNT
- FCC\_TRADE\_FIN\_BRKRGE\_EVNT
- FCC\_ACCT\_ID\_INSTN\_ID\_MAP

For more information, see the Upgrading from OFS ECM 8.0.5.0.0 to OFS ECM 8.0.7.0.0 section of [Oracle Financial Services Enterprise Case Management Installation & Configuration Guide 8.0.7.0.0](#).

### 6. For deploying Repository and catalog under, see the Deploying Analytic Reports and Threshold Analyzer section of [Oracle Financial Services Enterprise Case Management Installation & Configuration Guide 8.0.7.0.0](#)

7. Case Title Rule configuration for AML case types has been updated in this patch. For more information on updating the V\_CASE\_TITLE\_RULE field in FCC\_CORRELATION\_RULE table, see [Oracle Financial Services Enterprise Case Management Administration & Configuration Guide 8.0.7.0.0](#).

**NOTE**

Whenever any Case Type is not showing the tabs in the case details as per the Case Designer mapping, resave the mapping in the Case Designer and verify them after restarting the servers.

