

OFS AgileREPORTER Portal

Installation Guide

Release 8.0.2



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Preface

This Preface provides supporting information for the OFS AgileREPORTER Installation Guide and includes the following topics:

- Summary
- Audience
- Documentation Accessibility
- Related Documents
- Conventions

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 an access to the Oracle Support 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.

Audience

The OFS AgileREPORTER Pack Installation and Configuration Guide is intended for Administrators, Business User, Strategists, and Data Analyst, who are responsible for installing and maintaining the application pack components.

Prerequisites for the Audience

Following are the expected preparations before starting the actual installation:

The document assumes you have experience in installing Enterprise components. Basic knowledge about the Oracle Financial Services Advanced Analytical Applications Infrastructure Applications Pack components, OFSAA Architecture, UNIX commands, Database concepts and Web Server/ Web Application Server is recommended.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

This section identifies additional documents related to OFS AgileREPORTER. You can access Oracle documentation online from Documentation Library for OFS AgileREPORTER ([OTN](#)).

- Oracle Financial Services Data Foundation User Guide
- Oracle Financial Services US FED User Guide
- Oracle Financial Services RBI User Guide
- Oracle Financial Services Analytical Applications Infrastructure User Guide ([OTN](#))
- Oracle Financial Services Analytical Applications Infrastructure Environment Check Utility Guide ([OTN library](#))

Conventions and Acronyms

| Conventions | Description |
|-------------|-------------------------------------|
| AIX | Advanced Interactive executive |
| DEFQ | Data Entry Forms and Queries |
| DML | Data Manipulation Language |
| EAR | Enterprise Archive |
| EJB | Enterprise JavaBean |
| ERM | Enterprise Resource Management |
| FTP | File Transfer Protocol |
| GUI | Graphical User Interface |
| HTTPS | Hypertext Transfer Protocol Secure |
| J2C | J2EE Connector |
| J2EE | Java 2 Enterprise Edition |
| JDBC | Java Database Connectivity |
| JDK | Java Development Kit |
| JNDI | Java Naming and Directory Interface |

| Conventions | Description |
|-------------|--------------------------|
| JRE | Java Runtime Environment |
| JVM | Java Virtual Machine |

1 About OFS AgileREPORTER and OFS AgileREPORTER Packs

This chapter includes the following topics:

- [About OFS AgileREPORTER](#)
- [About OFS AgileREPORTER Platform Architecture](#)
- [About OFS AgileREPORTER Modules](#)

1.1 About OFS AgileREPORTER

OFS AgileREPORTER is a forms and workflow tool that enables creation and submission of regulatory returns. The OFS AgileREPORTER platform is configured with product configurations delivered using configuration packages. Different configuration packages are loaded into OFS AgileREPORTER to support different sets of regulatory returns, normally on jurisdictional lines.

For example, one configuration package may support US Broker / Dealer returns, whereas another configuration package may support European Common Reporting. When a regulation changes, only a new version of the related configuration package is required, there is usually no need to upgrade OFS AgileREPORTER.

A configuration package contains the following core artefacts:

1. Return template
2. Description of the submission files for the regulator
3. XBRL taxonomies
4. Validation rules and edit checks
5. Bindings to the FSDF data model

If you are using an OFSAA - OFS AgileREPORTER integrated solution, two configuration packages are required. One is from Lombard Risk, containing artefacts 1-4 above; and one from Oracle, containing artefact 5.

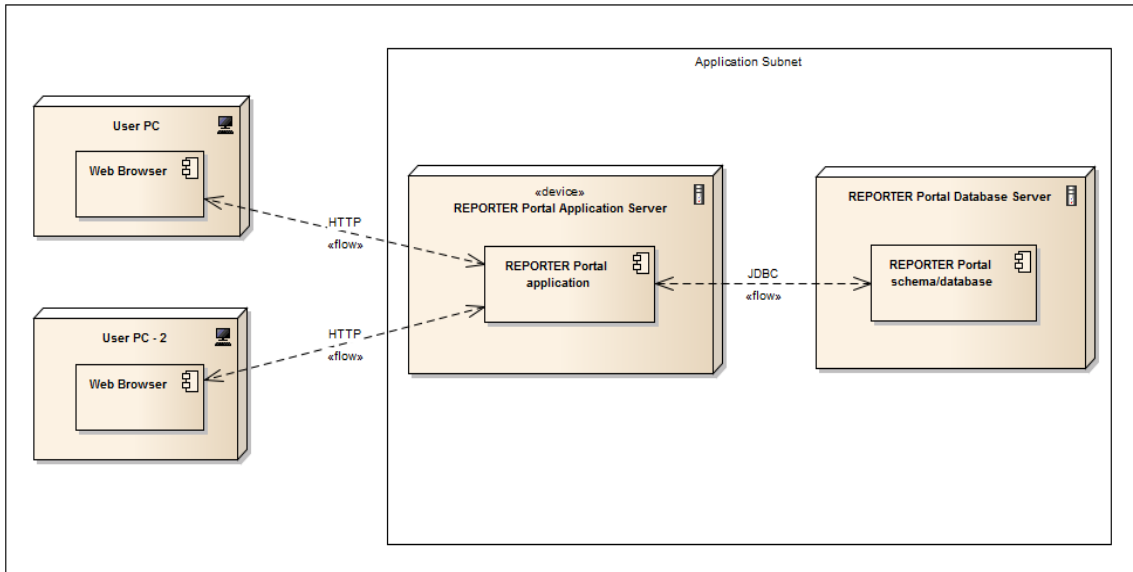
Chapter 2 – Preparing for Installation to Chapter 5 – Start/Stop AgileREPORTER Services describes how to install, update, configure, start and stop OFS AgileREPORTER platform.

1.2 About OFS AgileREPORTER Platform Architecture

OFS AgileREPORTER has a web-based user interface. Users interact with OFS AgileREPORTER to view and edit their regulatory returns using a standard web browser. No browser plugins are required – its user interface is completely standard compliant (HTML, CSS, and Javascript).

OFS AgileREPORTER platform contains an embedded Java EE server. All the business logic of OFS AgileREPORTER is executed within this server. The server itself is a single Java process running on the application server.

OFS AgileREPORTER requires a relational database. Oracle database is supported. For more details, refer Chapter 2 – Preparing for Installation.



The installation of OFS AgileREPORTER has a prerequisite that the OFS AgileREPORTER database is configured correctly. Prerequisites described in [Chapter 2 - Preparing for Installation](#).

1.3 About OFS AgileREPORTER Modules

If licensed sufficiently, OFS AgileREPORTER can also work with optional modules:

- **REPORTER:** Lombard Risk REPORTER® Suite provides calculated return data and form (template) metadata for OFS AgileREPORTER. If REPORTER module is installed for OFS AgileREPORTER, the REPORTER form (template) metadata will be used instead of OFS AgileREPORTER return metadata.
- **OFSAA:** The OFSAA Module for OFS AgileREPORTER provides integration with Oracle Financial Services Application Architecture. Oracle's OFSAA provides calculated return data which is read directly from OFSAA's results area, and applied to form (template) metadata in OFS AgileREPORTER.

2 Preparing for Installation

This chapter provides necessary information to review before installing the OFS AgileREPORTER Applications Pack v8.0.2. This chapter includes the following topics:

- [Installer and Installation Prerequisites](#)
- [Obtaining the Software](#)
- [Common Installation Activities](#)

2.1 Installer and Installation Prerequisites

This section describes the installation prerequisites for OFS AgileREPORTER Pack.

NOTE: This trial pack installer is only applicable for Linux Operating Systems and valid for 90 days. Please reach [Oracle Support](#) for procuring the license for enterprise use. AgileREPORTER installer is compatible for OEL only.

2.1.1 Supported Operating Systems

OFS AgileREPORTER is supported on the following operating system:

- **Linux**
 - Red Hat Enterprise Linux 5.[5-10], 6.*
 - Oracle Enterprise Linux 5.[5-10], 6.*

2.1.2 Required Software

Java Runtime Environment (JRE) (version 7 update 45 or later updates; version 8 update 91). The `JAVA_HOME` environment variable should point at the JRE installation folder, and `java` (in Unix) or `java.exe` (in Windows) should be placed in the system path.

NOTE: Use the Oracle JRE distribution. Open JDK is not supported.

How Java is used?

If the application server that OFS AgileREPORTER is installed on has multiple version of Java installed, OFS AgileREPORTER will attempt to use Java in the following order, moving to the next location if Java cannot be found:

1. `JAVA_HOME` properties defined in the `ocelot.properties` file. This is a local version of the `JAVA_HOME` properties and will not impact other applications using this variable.
2. `JAVA_HOME` defined at the system level (if it wasn't defined/overridden in the `ocelot.properties` file). This variable may be shared by other applications, so be careful if you want to modify it.

-
- The Java executable in the system path. This is the version of Java that is used when `java` is entered at the command line.

Ensure that the `JAVA_HOME` property points to a valid Java folder. For example, if the Java executable is in `/opt/java/Jre17/bin/java`, then set `JAVA_HOME=/opt/java/Jre17`.

Java Use Case Examples

Use the system-level `JAVA_HOME`

Make sure the System level `JAVA_HOME` is valid and that `JAVA_HOME` is not defined in the `ocelot.properties` file.

Use a different version of Java than the one defined by the system-level `JAVA_HOME`

Define `JAVA_HOME` in the `ocelot.properties` file.

Unsure about `JAVA_HOME` and it is not defined on the installation computer

Check if `JAVA_HOME` is defined in your system by entering the following at the command line:

Linux:

```
echo $JAVA_HOME
```

If `JAVA_HOME` is not defined in your system, then check if `java -version` can be run at the command line. If so, OFS AgileREPORTER will use the same version.

2.1.3 Supported Databases

OFS AgileREPORTER supports Oracle Database 11g Release 2 and 12c Release 1.

NOTE: This guide mentions SQL Server throughout. Please do not use these SQL Server options and settings. Full SQL Server support will be finalised in a later version.

2.1.3.1 Oracle-specific Settings

OFS AgileREPORTER requires a schema for installation and runtime. The same schema can be used for both. If desired, for security reasons you can use two different schemas:

- An *owner* schema that has DDL privileges. This schema is only used at installation and during Configuration Manager operations, and can otherwise be locked.
- An app schema that only has DML privileges. This schema is used at runtime.

The owner schema requires the following privileges (granted by someone with system database administrator privileges):

NOTE: You will need SYSDBA privileges to run the last four grants.

- `grant create session to <owner>;`

- grant create table to <owner>;
- grant create sequence to <owner>;
- grant create view to <owner>;
- grant select on pending_trans\$ to <owner>;
- grant select on dba_2pc_pending to <owner>;
- grant select on dba_pending_transactions to <owner>;
- grant execute on dbms_xa to <owner>;

The app schema and all accessible schemas that appear in the required alias of installed configurations are granted the following privileges (granted by someone with system database administrator privileges):

NOTE: You will need SYSDBA privileges to run the last four grants.

- grant create session to <app>;
- grant select on pending_trans\$ to <app>;
- grant select on dba_2pc_pending to <app>;
- grant select on dba_pending_transactions to <app>;
- grant execute on dbms_xa to <app>;

Schema/Login examples

Following are examples of DDL (*owner*) and DML (*app*) schemas/logins for OFS AgileREPORTER in Oracle and SQL Server, with user-definable items shown in **bold**:

- **Oracle**

```
-- Schema Owner  
  
CREATE USER RP$OWNER IDENTIFIED BY password  
  
DEFAULT TABLESPACE users  
  
TEMPORARY TABLESPACE temp  
  
QUOTA UNLIMITED ON users;  
  
grant create session to RP$OWNER;  
  
grant create table to RP$OWNER;  
  
grant create sequence to RP$OWNER;  
  
grant create view to RP$OWNER;  
  
grant select on pending_trans$ to RP$OWNER;
```

```
grant select on dba_2pc_pending to RP$OWNER;
grant select on dba_pending_transactions to RP$OWNER;
grant execute on dbms_xa to RP$OWNER;
-- Application User
CREATE USER RP$APP IDENTIFIED BY password
DEFAULT TABLESPACE users
TEMPORARY TABLESPACE temp
QUOTA UNLIMITED ON users;
grant create session to RP$APP;
grant select on pending_trans$ to RP$APP;
grant select on dba_2pc_pending to RP$APP;
grant select on dba_pending_transactions to RP$APP;
grant execute on dbms_xa to RP$APP;
-- create and grant object privilege role to application user to let
application user access the table of the schema owner
CREATE ROLE RP$RW_ROLE;
CREATE ROLE RP$R_ROLE;
grant RP$RW_ROLE to RP$APP;
```

2.1.4 Other Requirements

- Shut down any OFS AgileREPORTER web server that is currently running on the target server.
- Ensure that there is a free service port for OFS AgileREPORTER web server (default 8080) and a free service port for ActiveMQ (default 61616). If either default port is already being used by another application, find an alternative free port.

2.2 Obtaining the Software

This release of OFS AgileREPORTER Applications Pack 8.0.2 can be downloaded from the Oracle Software Delivery Cloud (<https://edelivery.oracle.com>). You need to have a valid Oracle account to download the software.

2.3 Common Installation Activities

The following are the common pre-installation activities that you need to carry out before installing the OFS AgileREPORTER application.

This section includes the following topics:

- [Identifying the Installation, Download and Metadata Repository Directories](#)
- [Configuration for GUI Mode Installation](#)
- [Downloading and Copying the OFS AgileREPORTER Application Installer](#)
- [Copying and Extracting the Software](#)
- [Setting up the Web Server/ Web Application Server](#)

2.3.1 Identifying the Installation Directory

For installation of any OFS AgileREPORTER Applications, the following folders/ directories required to be created.

- **OFS AgileREPORTER Download Directory** (Optional) - Create a download directory and copy the OFS AgileREPORTER Application Installer File (Archive). This is the directory where the downloaded installer/ patches can be copied.

NOTE: Ensure the user permission is set to 755 on the Installation and Download Directory.

2.3.2 Downloading and Copying the OFS AgileREPORTER Application Installer

To download and copy the OFS AgileREPORTER Applications Installer, follow these steps:

- To download the OFS AgileREPORTER Application, you need to login to the Oracle Software Delivery Cloud (<https://edelivery.oracle.com>). You need to have a valid Oracle account to download the software.
- Copy the downloaded installer archive to the Download Directory (in Binary mode) on the setup identified for OFSAA installation.

2.3.3 Copying and Extracting the Software

Once you obtain the installer, copy the installer (in BINARY mode) to the system on which the OFS AgileREPORTER Applications components will be installed.

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

1. Download the unzip utility (OS specific) `unzip_<os>.Z`, and copy it in Binary mode to any directory and include the directory in your PATH variable. If you already have the unzip utility to extract the contents of the downloaded archive, skip to the next step.

2. Uncompress the unzip installer file using the command:

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

NOTE: In case you notice an error message "uncompress: not found [No such file or directory]" when the package is not installed, contact your UNIX administrator.

3. Give EXECUTE permission to the file using the command:

```
chmod 751 unzip_<os>
```

For example, `chmod 751 unzip_sparc`

4. Extract the contents of the OFS AgileREPORTER Application 8.0.2.0.0 to Download Directory using the following command:

```
unzip OFS_AGILE_REPORTER_8.0.2.0.0_LINUX.zip
```

NOTE: DO NOT rename the Application Pack installer folder name on extraction from the archive.

5. Give following permission to the installer folder. Navigate to the Download Directory and execute the command:

```
chmod -R 755 OFS_AGILE_REPORTER
```

3 Installing OFS AgileREPORTER Applications Pack

Follow the instructions in this chapter to install the OFS AgileREPORTER Applications Pack depending on the mode of installation.

This chapter includes the following topics:

- [Running the OFS AgileREPORTER Applications Pack Installer](#)
- [Verifying the Installation](#)

3.1 Running the OFS AgileREPORTER Applications Pack Installer

OFS AgileREPORTER Applications Pack installation supports two modes of installation:

- [Running Installer in GUI Mode](#)
- [Running Installer in SILENT Mode](#)

3.1.1 Running Installer in GUI Mode

NOTE: Before proceeding, ensure that all pre-installation requirements listed in Chapter 2 - Installation pre-requisites are met.

NOTE: The following screenshots are taken from a Windows system, but will look similar in Linux.

NOTE: Configuration for GUI Mode Installation

To install this product in GUI mode, you need to ensure the following software and configurations are available:

- Install and configure any PC X Server software such as Open Text Exceed (formerly Hummingbird Exceed) on the user desktop system from which the installation is triggered.
- Configure DISPLAY variable.

Ensure to set the DISPLAY variable (in user .profile) on the system on which the OFSAA Infrastructure will be installed, to point to the user desktop system where the PC X Server software has been installed.

Syntax:

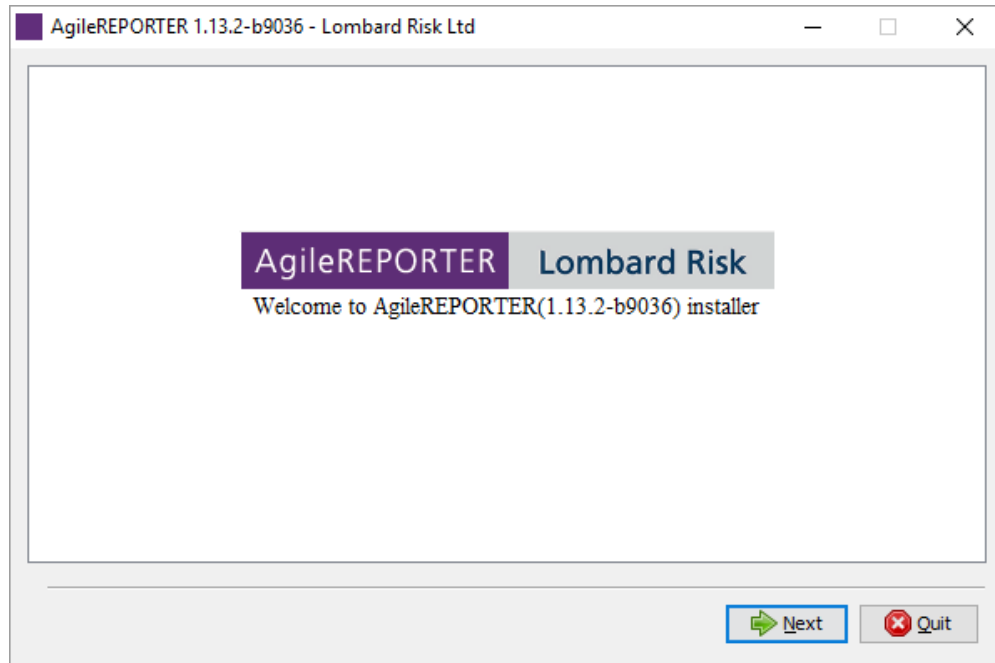
```
export DISPLAY = hostname:n
```

where hostname is the IP Address/ Host Name of the user desktop system and n is the sequence number (usually 0).

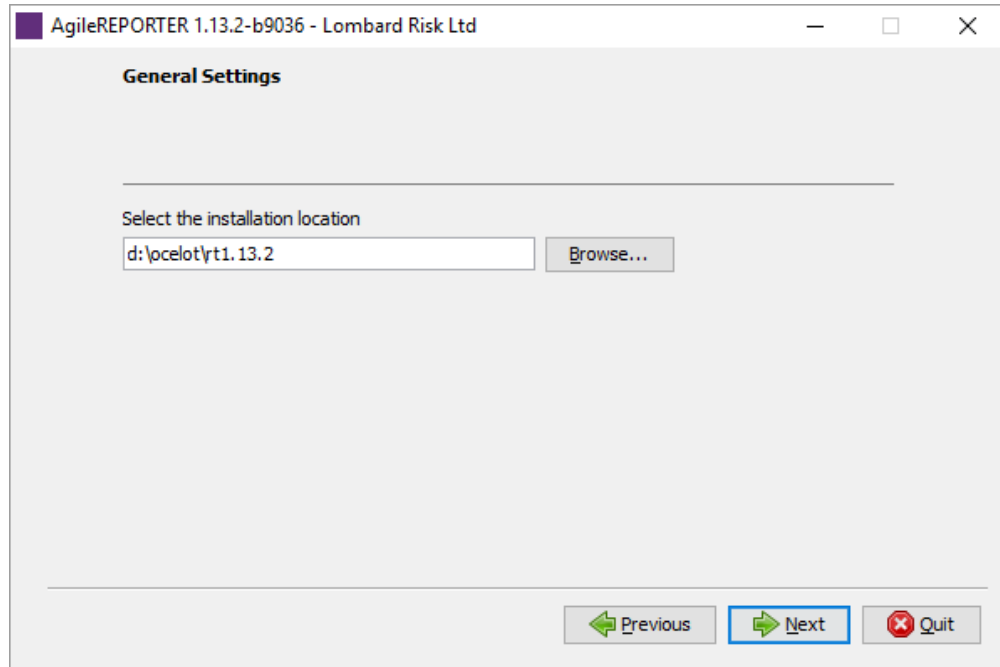
For example, 10.11.12.13:0 or myhostname:0

To install or upgrade OFS AgileREPORTER using the installer GUI, follow these steps (click **Next** to advance after each step):

1. Navigate to the path where OFS AgileREPORTER installer kit is unzipped.
2. Navigate to OFS_AGILE_REPORTER/AgileREPORTER/bin directory.
3. Execute `./Setup.sh` GUI command in the console.



4. Select the location where OFS AgileREPORTER must be installed.



AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

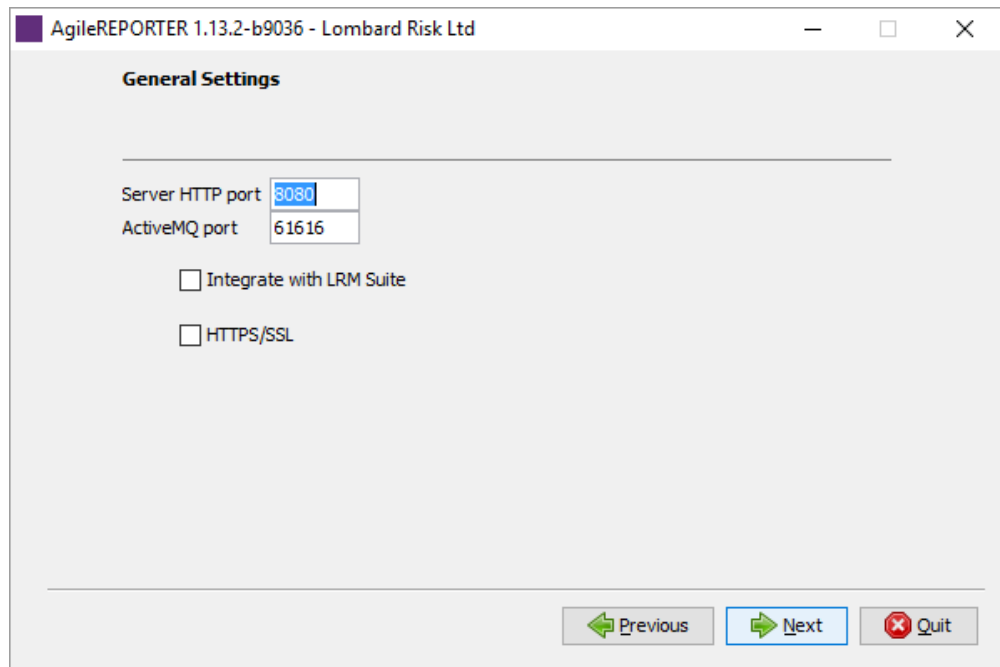
General Settings

Select the installation location

d:\ocelot\yt1.13.2 Browse...

Previous Next Quit

5. Enter the **Server HTTP port** and **ActiveMQ port** for OFS AgileREPORTER.



AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

General Settings

Server HTTP port 8080

ActiveMQ port 61616

Integrate with LRM Suite

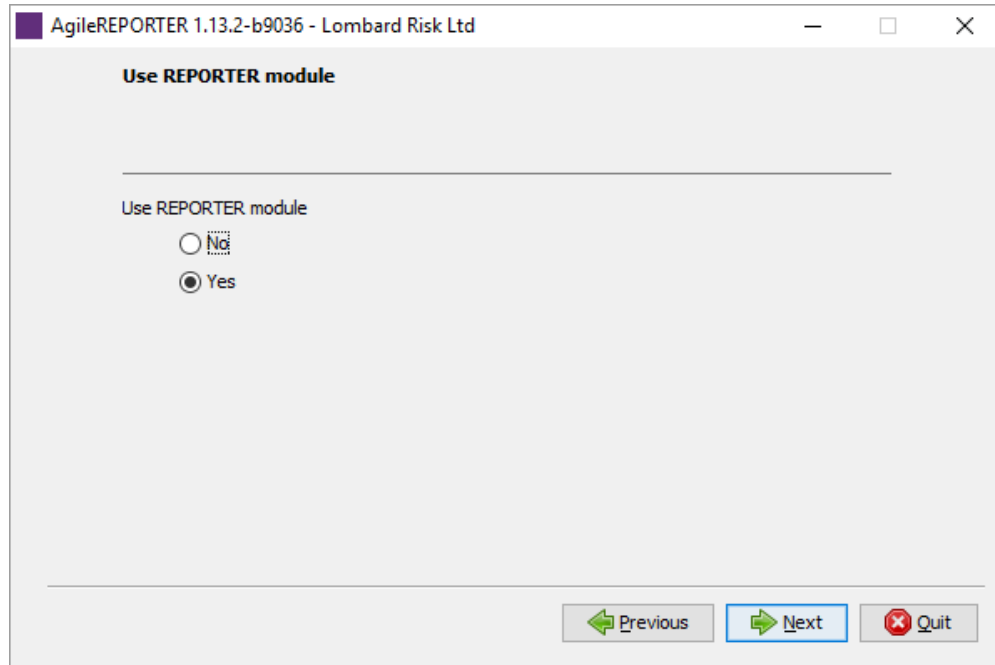
HTTPS/SSL

Previous Next Quit

Select **Integrate with LRM Suite** if OFS AgileREPORTER is installed along with other Lombard Risk Suite products.

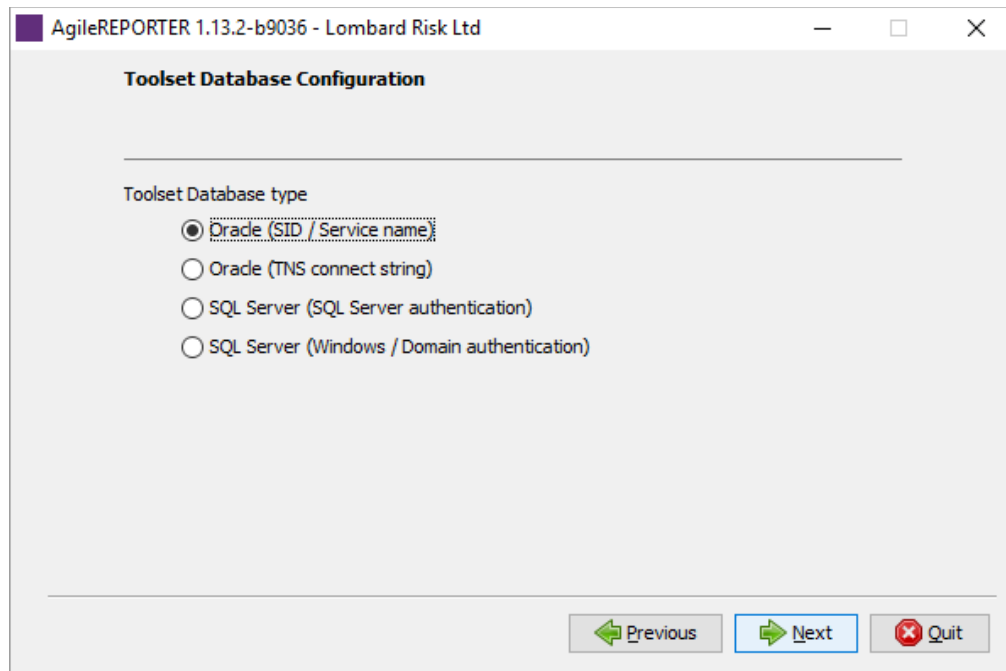
Select **HTTPS/SSL** if you want OFS AgileREPORTER to use the standards in browser.

6. Select **Use REPORTER module**.



NOTE: Selecting **No** will skip some steps.

7. Select **Toolset Database type** (for AgileREPORTER) and enter connection details, if **Yes** was selected in the previous step.



Oracle (SID/service):

AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

Toolset Database Configuration

Database server host or address

Database server port

Connect by

SID

Service name

SID / Service name

Toolset system username

Toolset system password

Oracle (TNS connect string):

AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

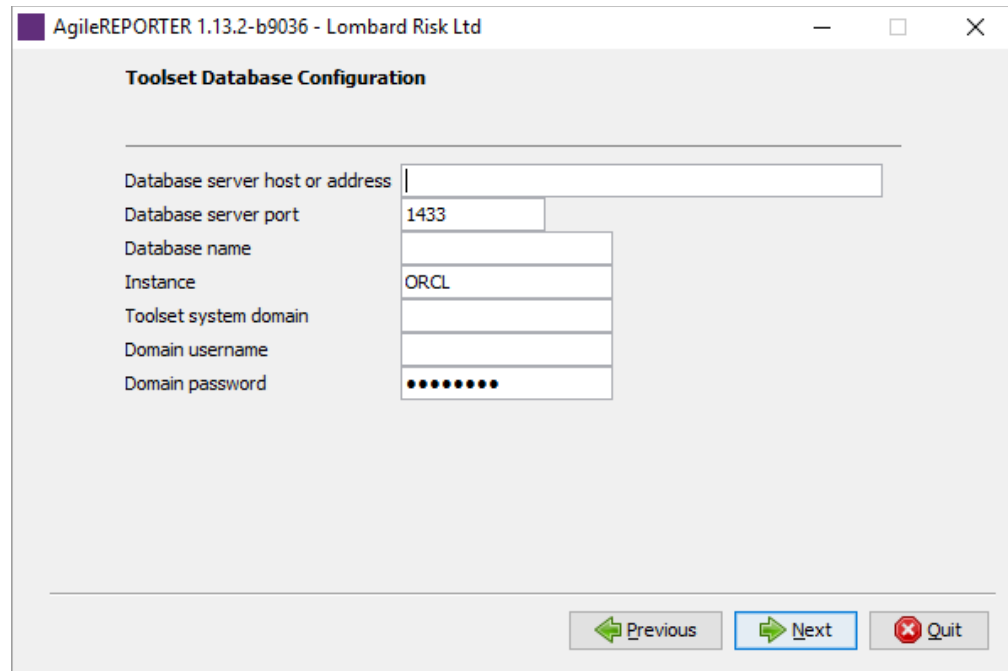
Toolset Database Configuration

Oracle TNS connect string

Toolset system username

Toolset system password

Microsoft SQL Server (SQL Server authentication):



AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

Toolset Database Configuration

Database server host or address

Database server port

Database name

Instance

Toolset system domain

Domain username

Domain password

NOTE: For Windows single sign-on, leave the **Toolset system domain**, **Domain username** and **Domain password** fields blank.

For domain single sign-on, enter the **Toolset system domain**, but leave the **Domain username** and **Domain password** fields blank.

For domain authentication, enter the **Toolset system domain**, **Domain username** and **Domain password**.

8. Select **Enable SSO Function** and then enter values for **Identity Provider URL** and **Service Provider URL** if Single Sign-On should be used instead of logging in using user accounts created in OFS AgileREPORTER.

Enable Single Sign-On

Enable SSO Function

Identity Provider URL

Service Provider URL

1. Identity Provider URL is the IdP url where the SAML request needs to be posted to.
You can ask your administrator for this url.

2. Service Provider URL should set AgileREPORTER web home url.

Previous Next Quit

Identity Provider URL is where OFS AgileREPORTER will send SSO requests, for example to an identity provider set up within your infrastructure.

Service Provider URL should usually be [http\(s\)://<hostname>:<port>/agilereporter/](http(s)://<hostname>:<port>/agilereporter/), the OFS AgileREPORTER URL.

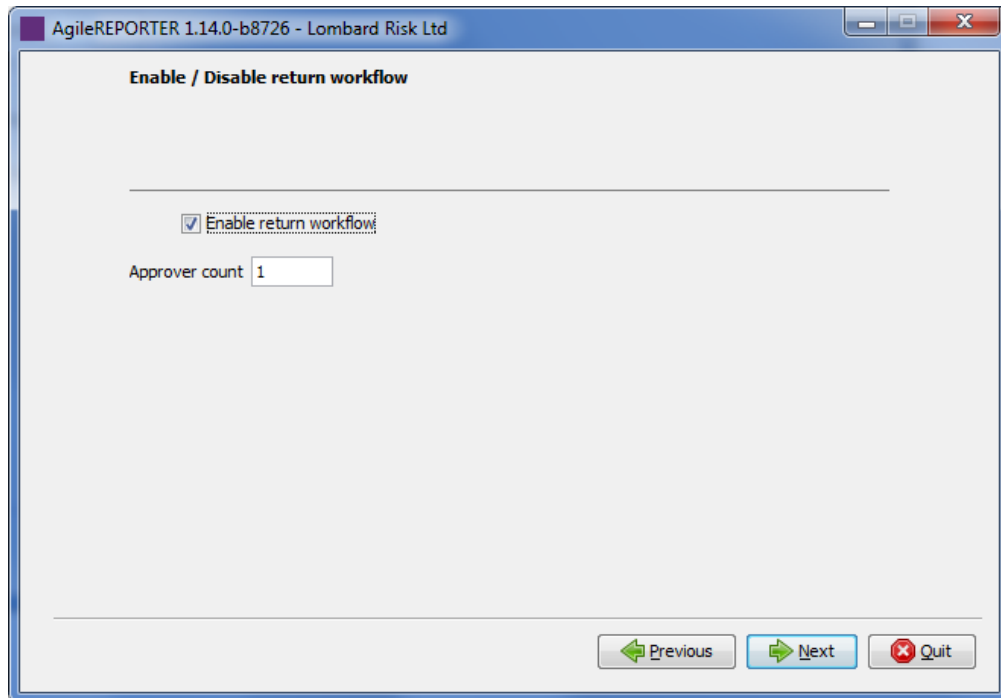
NOTE: OFS AgileREPORTER supports Single Sign-On by using the SAML v2 protocol. If you have the SAML v2 compatible Identity Provider in your IT infrastructure already, the Identity Provider can be used to authenticate users of OFS AgileREPORTER. One possible usage of this functionality is that OFS AgileREPORTER, OBIEE and OFSAA web share single sign-on using SAML v2 implemented by Oracle Identity Federation. This requires that OFS AgileREPORTER as a SAML service provider (SP) is configured with the details of Oracle Identity Federation as a SAML v2 identity provider (IdP). The OFSAA results area database credentials are added post-installation using OFS AgileREPORTER's Configuration Manager.

NOTE: For accurate SSO usage in OFS AgileREPORTER, ensure the following:

- The times on the identity provider server and the OFS AgileREPORTER server are synchronised.
- The identity provider uses a plain text username in the SAML assertion sent to OFS AgileREPORTER when attempting a user login.
- The same username exists in OFS AgileREPORTER.

The identity provider includes the role LRM_RP_USER in the SAML assertion sent to OFS AgileREPORTER when attempting a user login.

9. Select **Enable return workflow** to enable approval workflow for changes made to returns, and set how many approvers are required per change.



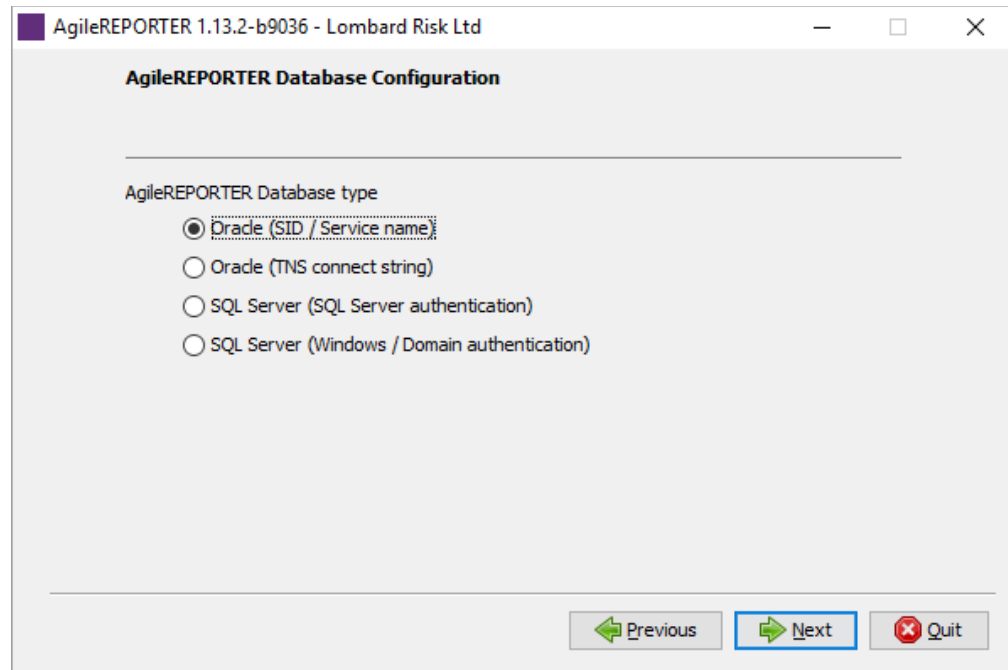
NOTE: If your installation of OFS AgileREPORTER has been connected to the REPORTER module then OFS AgileREPORTER will use approval workflow settings from there instead of showing you this step.

You may need a new license to enable the approval workflow feature, contact Lombard Risk.

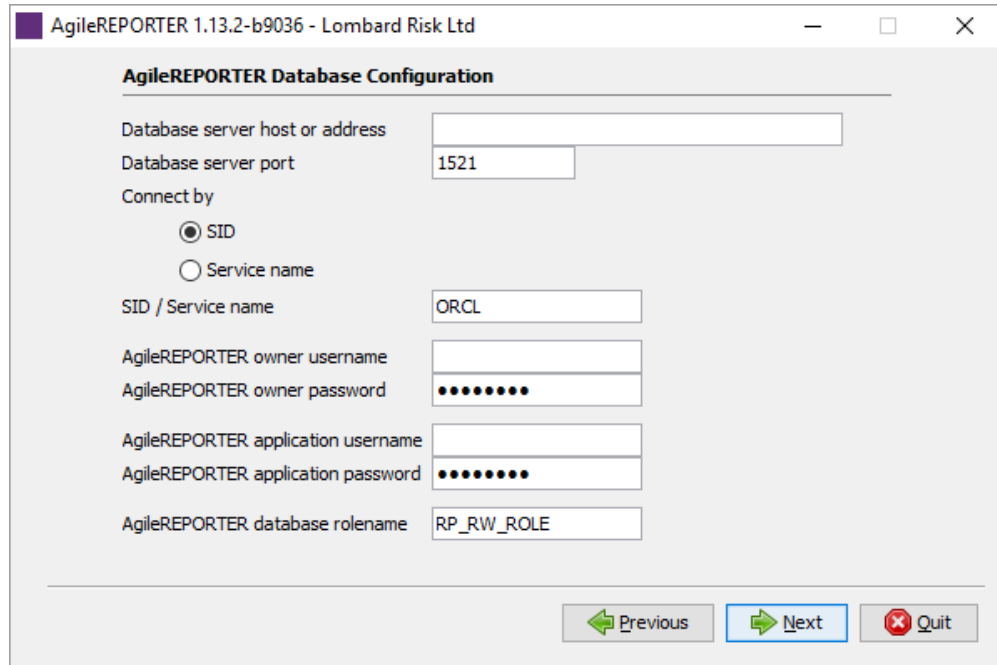
10. Enter the database connection information and credentials for the OFS AgileREPORTER schemas with DDL (at installation) or DML (at application runtime).

NOTE: Credentials must match those defined in the schemas referenced in the Supported databases section of Chapter 2 - Installation pre-requisites.

NOTE: Select **Oracle (SID / Service name)**. Full SQL Server support will be supplied in a later version.



Oracle (SID / service):



AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

AgileREPORTER Database Configuration

Database server host or address

Database server port

Connect by

SID

Service name

SID / Service name

AgileREPORTER owner username

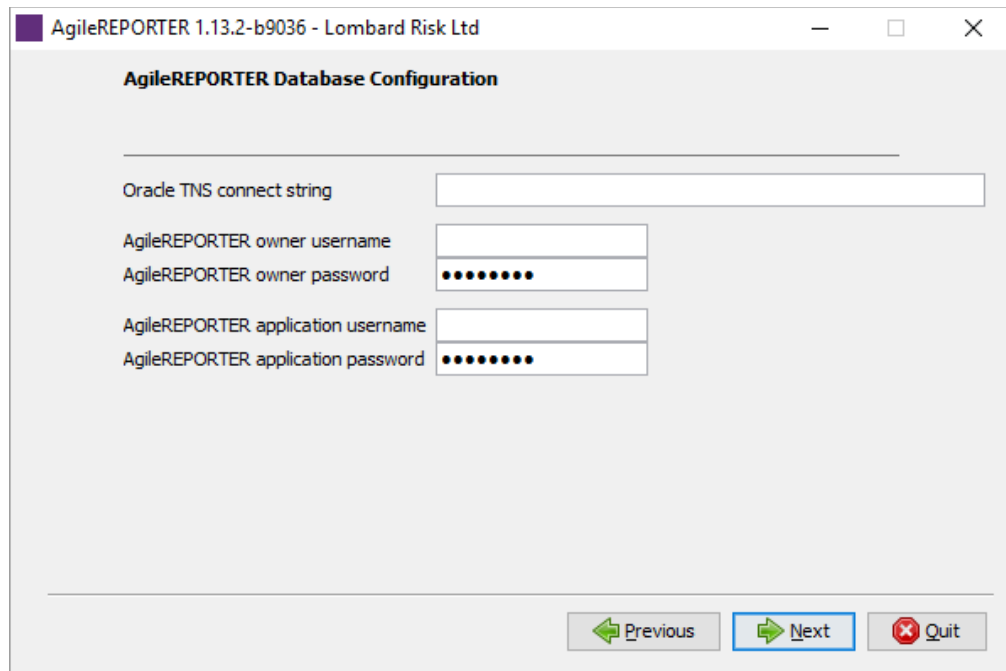
AgileREPORTER owner password

AgileREPORTER application username

AgileREPORTER application password

AgileREPORTER database rolename

Oracle (TNS connect string):



AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

AgileREPORTER Database Configuration

Oracle TNS connect string

AgileREPORTER owner username

AgileREPORTER owner password

AgileREPORTER application username

AgileREPORTER application password

SQL Server (database authentication):

The screenshot shows a window titled "AgileREPORTER 1.13.2-b9037 - Lombard Risk Ltd" with the subtitle "AgileREPORTER Database Configuration". The form contains the following fields:

- Database server host or address: [Empty text box]
- Database server port: 1433
- Database name: [Empty text box]
- Instance: [Empty text box]
- AgileREPORTER system username: [Empty text box]
- AgileREPORTER system password: [Masked with 7 dots]
- AgileREPORTER application username: [Empty text box]
- AgileREPORTER application password: [Masked with 7 dots]

At the bottom right, there are three buttons: "Previous" (disabled), "Next" (active), and "Quit" (disabled).

SQL Server (Windows/domain authentication):

The screenshot shows a window titled "AgileREPORTER 1.13.2-b9037 - Lombard Risk Ltd" with the subtitle "AgileREPORTER Database Configuration". The form contains the following fields:

- Database server host or address: [Empty text box]
- Database server port: 1433
- Database name: [Empty text box]
- Instance: [Empty text box]
- AgileREPORTER system domain: [Empty text box]
- Domain username: [Empty text box]
- Domain password: [Masked with 7 dots]

At the bottom right, there are three buttons: "Previous" (disabled), "Next" (active), and "Quit" (disabled).

NOTE: For domain single sign-on, enter **OFS AgileREPORTER system domain**, but leave the **Domain username** and **Domain password** blank.

NOTE: For domain authentication, enter **OFS AgileREPORTER system domain**, **Domain username** and **Domain password**.

11. Set up the initial **AgileREPORTER administration user** account.

NOTE: This step only appears during a fresh installation of OFS AgileREPORTER.

AgileREPORTER 1.13.2-b9037 - Lombard Risk Ltd

Create AgileREPORTER administration user

Username

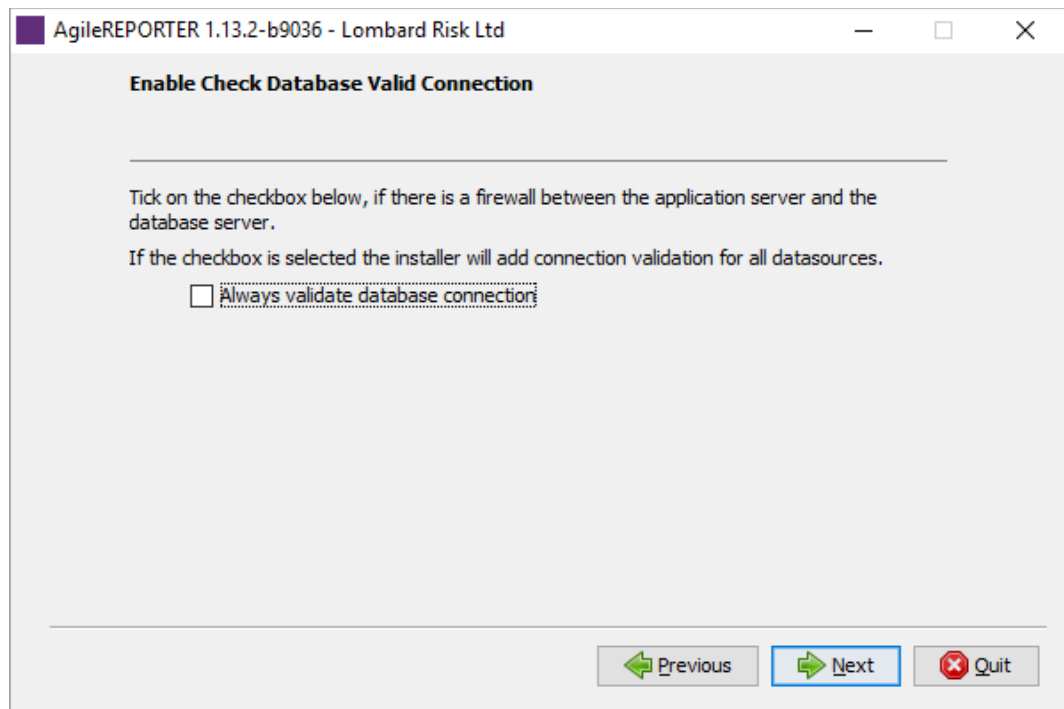
Password:

Confirm password:

Previous Next Quit

If Single Sign-On is enabled, the **Username** must be a valid user in the Identity Provider and the password can be left blank. This user will be created as an administration user in OFS AgileREPORTER.

12. Select **Always validate database connection** to check if there is a firewall between the application server and database server.

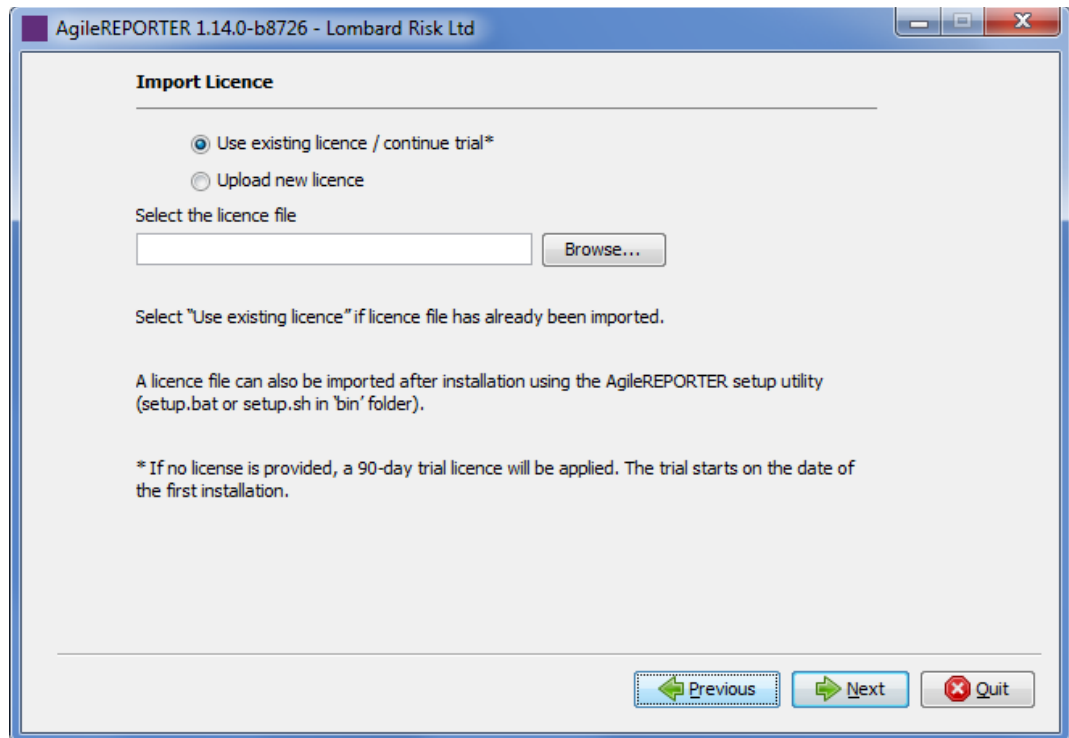


13. Select **Upload new licence** and click **Browse** and select the OFS AgileREPORTER license file to import (if not already imported).

NOTE: Alternatively, import the license file after installation by running the setup utility in the `/bin` directory.

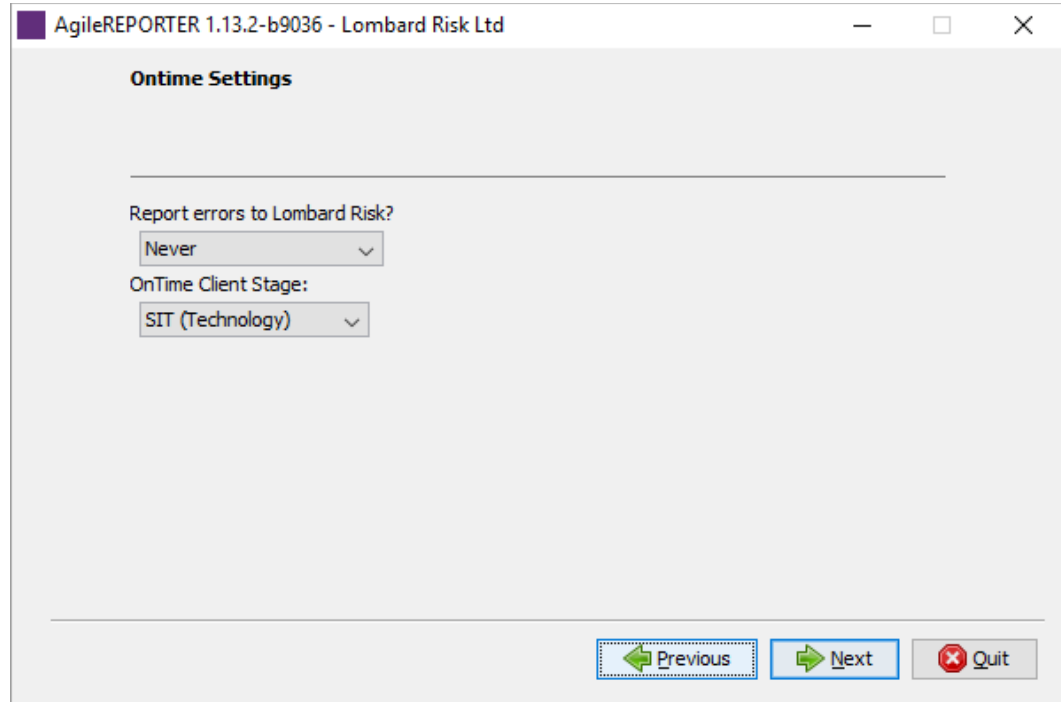
Skip this step and run OFS AgileREPORTER in a 90-day trial mode.

Select **Use existing licence / continue trial** if the licence file was already imported and click **Next**.



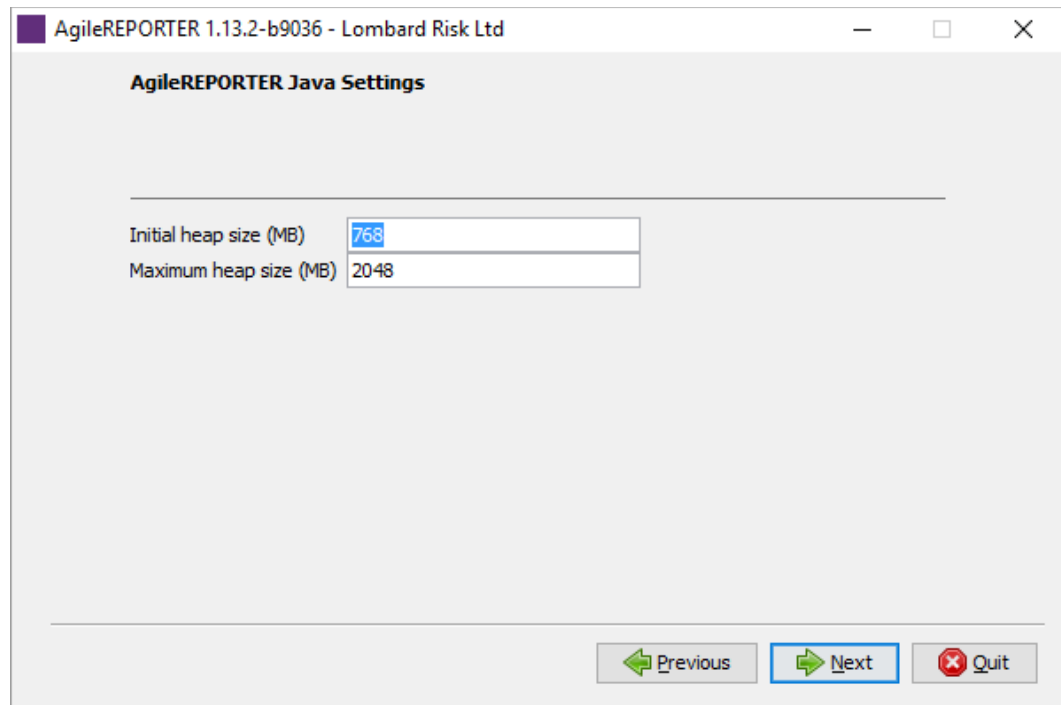
14. Select **OnTime Settings** to enable your Lombard Risk OnTime support, allowing incidents to be logged and tracked.

NOTE: As this functionality is not available, select **Never** from **Report errors to Lombard Risk?** list.



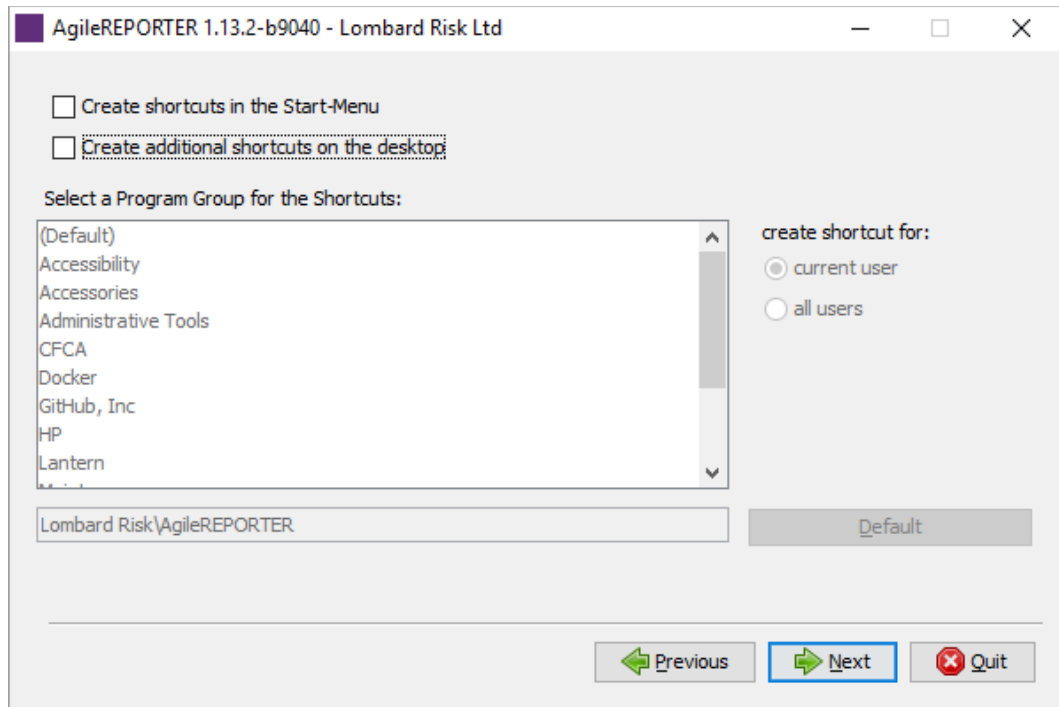
The screenshot shows a window titled "AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd" with a close button. The main content area is titled "OnTime Settings". Below the title is a horizontal line. There are two dropdown menus: "Report errors to Lombard Risk?" with "Never" selected, and "OnTime Client Stage:" with "SIT (Technology)" selected. At the bottom right, there are three buttons: "Previous" (disabled), "Next" (active), and "Quit" (disabled).

15. Enter the Java minimum and maximum heap size.



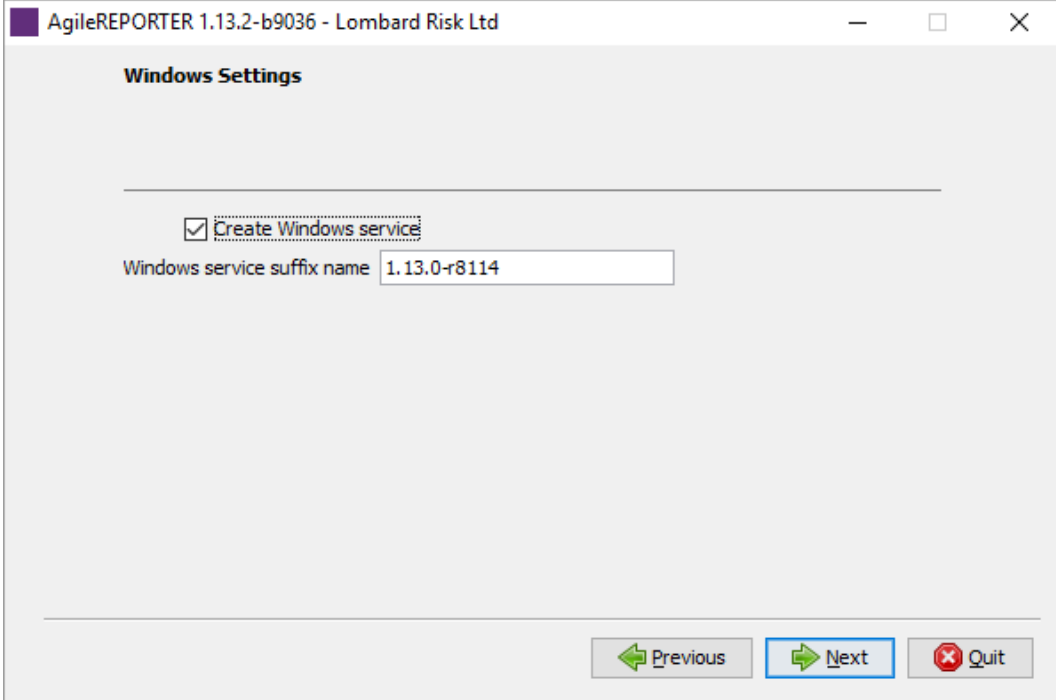
The screenshot shows a window titled "AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd" with a close button. The main content area is titled "AgileREPORTER Java Settings". Below the title is a horizontal line. There are two text input fields: "Initial heap size (MB)" with the value "768" entered, and "Maximum heap size (MB)" with the value "2048" entered. At the bottom right, there are three buttons: "Previous" (disabled), "Next" (active), and "Quit" (disabled).

16. Select the shortcut settings if required.



17. Select **Create Windows service** to create a Windows service on the server where OFS AgileREPORTER is running. This appears as **Create Unix service** if installing in Linux.

Enter a suffix if required, which will follow 'OFS AgileREPORTER' in the service name. If installing in Linux, also enter the **starter user account name**, which is the Linux operating system account that will start the service.



AgileREPORTER 1.13.2-b9036 - Lombard Risk Ltd

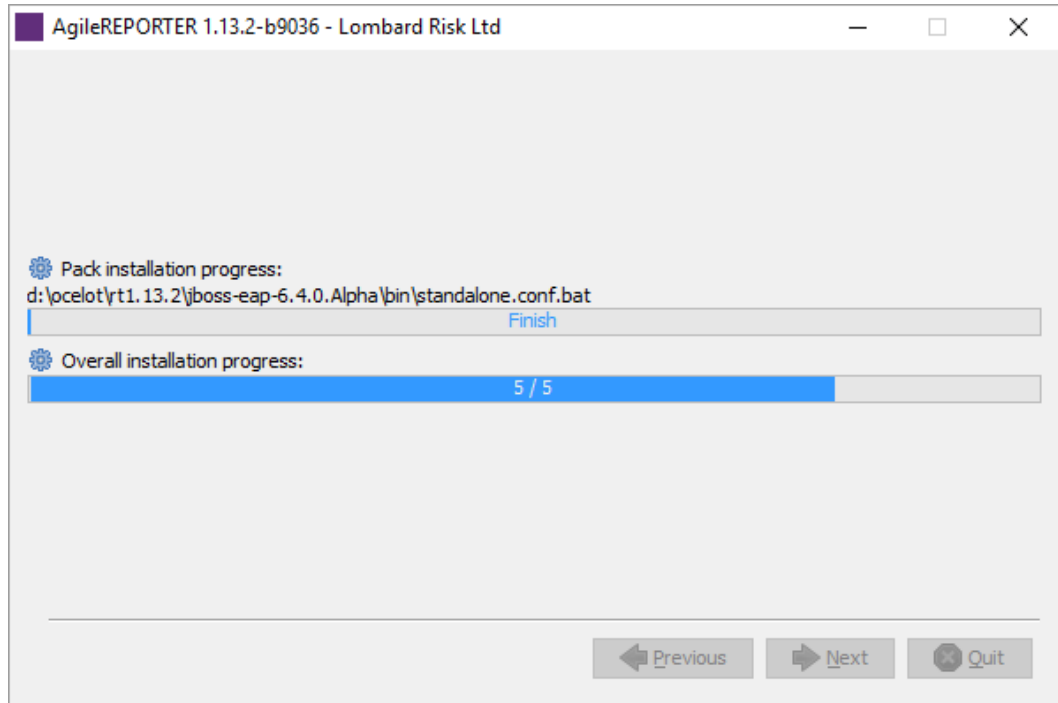
Windows Settings

Create Windows service

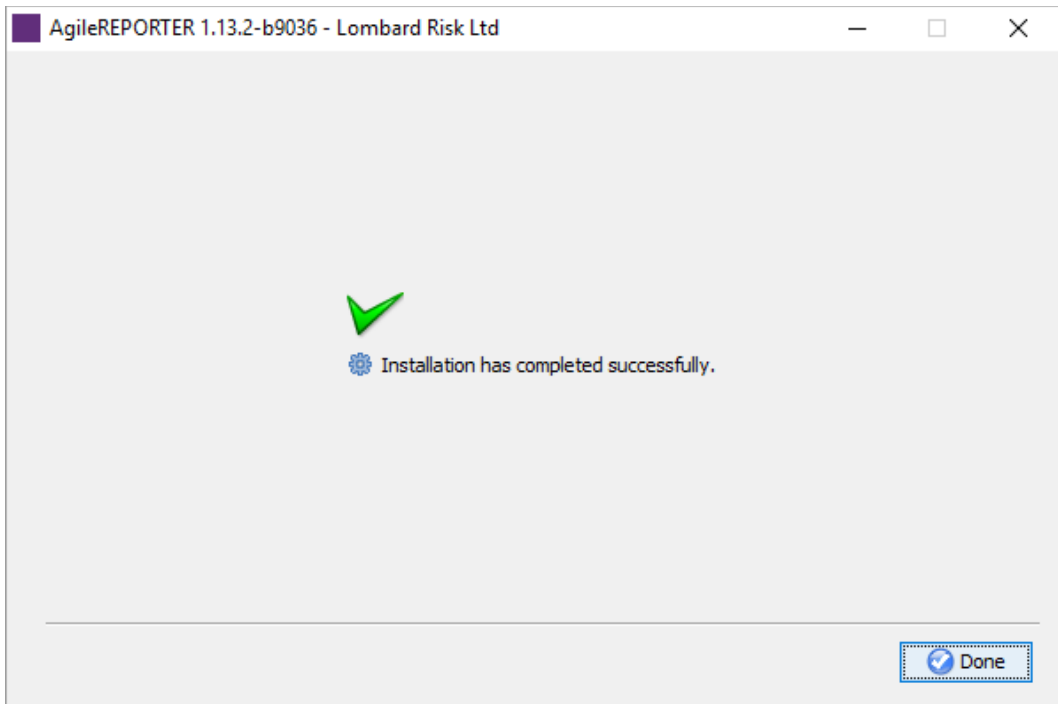
Windows service suffix name

Previous Next Quit

18. Wait for unpacking and installation to complete.



19. Click **Done** to finish the installation process.



NOTE: If required, the DDL schema/login can be locked after successfully installing the OFS AgileREPORTER.

You can now try opening OFS AgileREPORTER in a web browser. For example, open Internet Explorer and enter [http\(s\)://<server>:<port>](http(s)://<server>:<port>) or [http\(s\)://<server>:<port>/agilereporter](http(s)://<server>:<port>/agilereporter), specifying the chosen http protocol, server address and port.

3.1.2 Running the Installer in SILENT Mode

NOTE: Before proceeding, ensure that all pre-installation requirements listed in [Chapter 2 - Preparing for Installation](#) are met.

NOTE: You need to fill the `Silent.props` file from `<Installer>/conf` directory before starting the installation.

The following table describes the installation properties that should be filled in the `Silent.props` Java Properties file. This file uses a standardised format consisting a key followed by an equals sign '=', followed by a value on each line.

The following characters must be appended with a backslash '\' for the Escaped version when used in keys and values:

| Character Name | Character Symbol | Escaped Version |
|----------------|------------------|-----------------|
| Equals | = | \= |
| Colon | : | \: |
| Backslash | \ | \\ |

For example:

`\:\=\bin\temp` when un-escaped translates to `:=\bin\temp`.

For more information, refer <http://docs.oracle.com/javase/6/docs/api/java/util/Properties.html#load> (`java.io.Reader`) or contact Lombard Risk support.

The configurable properties with a grey background are not shown in the OFS AgileREPORTER installer user interface. Please do not alter these unless instructed to do so by Lombard Risk support.

| Property Name | Description of Property | Permissible values | Comments |
|-------------------------------------|---|--|--|
| ocelot.install.path | AgileREPORTER Home Directory Install Path | Not applicable | For example: /scratch/ofsaapp/reporter_portal |
| http.enabled | Modify HTTP Enable Required or Not | True False | Default value is True . |
| httpsMode | HTTPS/SSL Required or Not | True False | Default value is False . Value should be True only if HTTP is false. (Optional. Required only when HTTPS is used). |
| host.port.offset host.port.https | HTTPS Port and Offset | Not applicable | (Optional. Required only when HTTPS is used). For example: host.port.offset = 10 host.port.https = 8453 |
| host.port | AgileREPORTER Web Host Port | Not applicable | For example: 8090 . |
| activemq.port | AgileREPORTER jBoss amq Port | Not applicable | For example: 61616 . |
| toolset.database.type | RPOWNER (Toolset) Database Type | Oracle | Default value is Oracle . |
| toolset.jdbc.url | RPOWNER (Toolset) JDBC URL | jdbc:oracle:thin:@ IPADDRESS:PORT: SID | For example: jdbc:oracle:thin:@10.184.100.100:1521:AGILERP |
| toolset.jdbc.username | RPOWNER (Toolset) Schema User Name | Not applicable | For example: AGILE_RPOWNER |
| toolset.jdbc.password | RPOWNER (Toolset) Schema Password | Not applicable | For example: password1 |
| ocelot.database.type | Ocelot Database Type | Oracle | Default value is Oracle . |
| ocelot.jdbc.url | Ocelot JDBC URL | jdbc:oracle:thin:@ IPADDRESS:PORT: SID | For example: jdbc:oracle:thin:@10.184.100.100:1521:AGILERP |

| Property Name | Description of Property | Permissible values | Comments |
|---|---|-----------------------------|--|
| ocelot.jdbc.username | RPOWNER Schema User Name | Not applicable | For example: AGILE_RPOWNER |
| ocelot.jdbc.password | RPOWNER Schema Password | Not applicable | For example: password1 |
| ocelot.database.role name | RP RW Role Name | Not applicable | For example: AGILE_RPRW_ROLE |
| ocelot.app.jdbc.user name | RPAPP Schema User Name | Not applicable | For example: AGILE_RPAPP |
| ocelot.app.jdbc.password | RPAPP Schema Password | Not applicable | For example: password1 |
| ocelot.user.name | AgileREPORTER UI Login User Name | Not applicable | For example: RP Admin |
| ocelot.user.password | AgileREPORTER UI Login Password | Not applicable | For example: password1 |
| sso.enable sso.idp.url sso.service.provider.url check.db.valid.connection.enable | Agile Reporter UI using SSO Credentials | Multiple (True, False, URL) | Optional. For example: sso.enable = false sso.idp.url = sso.service.provider.url = check.db.valid.connection.enable = false |
| singleLoginModel | Single Login Model | True False | Default Value is False . NOTE: Enter True if you want to restrict one user per session. |
| license.import | Licence Import Option | True False | Optional. Default Value is False . NOTE: If you wish to use the 90 days trial version, this parameter can be ignored. |

| Property Name | Description of Property | Permissible values | Comments |
|--|-------------------------------|--------------------|---|
| license.file | AgileREPORTER Licence File | Not applicable | Only if <code>license.import = true</code> , then enter the License File to be imported (get the full license of AgileREPORTER Installer from Oracle Support and place the file in any location of the same server). For example: <code>/scratch/ofsaapp/kit/license/AgileREPORTER-Standard-License-v1.13.2.xml</code> |
| jvm.parameters.Xms jvm.parameters.Xmx | Java Heap Memory | 1024 2048 | Optional. For example: <code>jvm.parameters.Xms = 1024</code> <code>jvm.parameters.Xmx = 2048</code> |

NOTE: When installing in silent mode, set `isPasswordEncrypted` to `false` to allow plain text passwords in the properties file.

1. Navigate to the path where OFS AgileREPORTER installer kit unzipped.
2. Navigate to `OFS_AGILE_REPORTER/AgileREPORTER/conf` directory.
3. Rename the file `Silent.template` to `Silent.props` and update the file as explained in [Section 3.1.2](#)
4. Navigate to `OFS_AGILE_REPORTER/AgileREPORTER/bin` directory in console.
5. Execute `./Setup.sh SILENT` command.

If installation fails, check the log file at `log/install.log` in your installation path.

You can now try opening OFS AgileREPORTER in a web browser. For example, open Internet Explorer and enter `http(s)://<server>:<port>/agilereporter`, specifying the chosen HTTP protocol, server address, and port.

3.1.3 Verifying the Log File

The log file `install.log` can be found in the path `<RP_HOME>/log`. The log files contain detailed summary of installation processes. It also shows the number of Fatal Errors, Errors, Debug Statements, Information, and Warnings.

4 Trial Template Package Installation

As part of AgileREPORTER installer, user will be able to install Trial Template Packages for RBI and US FED.

4.1 Trial Template Package for US FED

OFS AgileREPORTER US FED Configuration Package Installation is a new Application, which is used for submitting the regulatory reports to the regulator.

This installer contains the following three US FED return templates:

- FRY9C
- FFIEC101
- FFIEC031

NOTE: This is trial pack installer, which can be used only for three returns. Please reach [Oracle Support](#) for procuring the license for complete US FED return templates.

4.2 Trial Template Package for RBI

OFS AgileREPORTER RBI Configuration Package Installation is a new application, which is used for submitting the regulatory reports to the regulator Reserve Bank of India.

This installer contains the following three RBI return templates:

- RCA3
- IRS
- RAQ

NOTE: This is trial pack installer, which can be used only for three returns. Please reach [Oracle Support](#) for procuring the license for complete RBI return templates.

4.3 Installing Trial Template Packages

This section describes the steps to install Trial Template Packages.

1. Navigate to `/OFS_AGILE_REPORTER/Template_Packages/conf` directory.
2. Update the parameters in `params.conf` file present in `/AGILE_RP_RBI/conf` directory.
The update instructions are present in the file itself.

| Parameter | Description | Values |
|-----------|---|---|
| RP_HOME | Agile Reporter Home Directory Install Path. | For example: /scratch/ofsaapp/reporter_portal |
| PACK_ID | Pack ID of Trial Template Package you want to install. NOTE: Only one value at a time is permitted. | List of values expected are: RBI, USFED. For example: USFED |

3. Navigate to /OFS_AGILE_REPORTER/Template_Packages/ directory and execute the command:

```
chmod 755 *
```

4. Navigate to /OFS_AGILE_REPORTER/Template_Packages/bin directory.
5. Execute install.sh file using the following command.

```
./install.sh
```

6. Verify if the release is applied successfully by checking the log file generated in the installation folder. Logs can be found in <RP_HOME>/log/config.log file.

5 Start/Stop AgileREPORTER Services

This section describes the steps to start and stop the AgileREPORTER services.

5.1 Start AgileREPORTER Web Server

Following are the steps to start the AgileREPORTER Web server:

1. Navigate to `<RP_HOME>/bin` directory. Command.
2. Execute `nohup start.sh > rplog.txt &` command.

5.2 Stop AgileREPORTER Web Server

Following are the steps to stop the AgileREPORTER Web server:

1. Navigate to `<RP_HOME>/bin` directory.
2. Execute `stop.sh` command.

6 Error Dictionary

The content 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.

6.1 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 instructions to quickly find the error resolution.

1. With the Installation Guide PDF open, press **Ctrl+F** or select **Edit > Find**.
2. The **Find** dialog is displayed.
3. Enter the **error code** that is displayed on screen during infrastructure installation.
4. Press **Enter**. The search results are displayed and highlighted as follows.

| Error code - OFSAAI-1003 | |
|--------------------------|---|
| Cause | JAVA_HOME/bin not found in PATH variable. |
| Resolution | Import <JAVA_HOME>/bin into PATH variable. Example: PATH = \$JAVA_HOME/bin:\$PATH export PATH. |

Error Dictionary

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 [Oracle Support](#) along with log files and appropriate screen shots.

6.2 Error Code Dictionary

6.2.1 Error code - OFSAAI-1002

| | |
|-------------------|--|
| Cause | No proper arguments are available. |
| Resolution | Provide proper arguments. Invoke Setup.sh using either SILENT or GUI mode. Example: ./Setup.sh SILENT or ./Setup.sh GUI |



Oracle Financial Services AgileREPORTER Portal

8.0.2.0.0 Installation Guide

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