

OFS AgileREPORTER Portal

Installation Guide

Release 8.0.5.1.0

May 2018

ORACLE®
Financial Services

DOCUMENT CONTROL

Version Number	Revision Date	Changes Done
1.0	Updated: May 2018	Document contents are categorized to appropriate sections and structured considering all the 8.0.5.1.0 features.
Created by: Anish Kumar Nair / Naveen Harry D'Cruz	Reviewed by: Subin Menon	Approved by: Subin Menon

Executive Summary

The document consists of all the installation, Pre and Post configuration procedures which have been structured considering all the 8.0.5.1.0 features. You can find the latest copy of this document in [OHC](#) Documentation 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 Oracle Support Portal with the required login credentials to quickly notify us for any specific issues. You can obtain one by contacting [Oracle Support Services](#).

TABLE OF CONTENTS

PREFACE	5
Summary	5
Audience	5
Prerequisites for the Audience.....	5
Documentation Accessibility	5
Access to Oracle Support	6
Related Documents	6
Conventions and Acronyms.....	6
1 ABOUT OFS AGILEREPORTER AND OFS AGILEREPORTER PACKS	8
1.1 About OFS AgileREPORTER.....	8
1.2 About OFS AgileREPORTER Platform Architecture	8
1.3 About OFS AgileREPORTER Modules	9
2 PREPARING FOR INSTALLATION	10
2.1 Installer and Installation Prerequisites.....	10
2.1.1 Supported Operating Systems	10
2.1.2 Required Software	10
2.1.3 Supported Databases	11
2.1.4 Other Requirements.....	13
2.2 Obtaining the Software.....	13
2.3 Common Installation Activities	13
2.3.1 Identifying the Installation Directory.....	14
2.3.2 Copying and Extracting the Software	14
3 INSTALLING OFS AGILEREPORTER APPLICATIONS PACK	15
3.1 Running the OFS AgileREPORTER Applications Pack Installer	15
3.1.1 Running the Installer in GUI Mode.....	15
3.1.2 Running the Installer in GUI Mode for Upgrade	28
3.1.3 Running the Installer in SILENT Mode.....	29
3.1.4 Running the Installer in SILENT Mode for Upgrade	32
3.1.5 Verifying the Log File	32
4 TRIAL TEMPLATE PACKAGE INSTALLATION	33
4.1 Trial Template Package for US FED	33

- 4.2 Trial Template Package for RBI33
- 4.3 Installing Trial Template Packages33
- 5 START/STOP AGILEREPORTER SERVICES..... 35**
 - 5.1 Start AgileREPORTER Web Server35
 - 5.2 Stop AgileREPORTER Web Server35
- 6 ERROR DICTIONARY 36**
 - 6.1 Accessing Error Dictionary36
 - 6.2 Error Code Dictionary.....36
 - 6.2.1 Error code - OFSAAI-1002 36

Preface

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

- [Summary](#)
- [Audience](#)
- [Prerequisites for the Audience](#)
- [Documentation Accessibility](#)
- [Related Documents](#)
- [Conventions and Acronyms](#)

Summary

You can find the latest copy of this document in [OHC](#) 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 ([OHC](#)).

- 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 ([OHC](#))
- Oracle Financial Services Analytical Applications Infrastructure Environment Check Utility Guide ([OHC](#) Documentation 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.

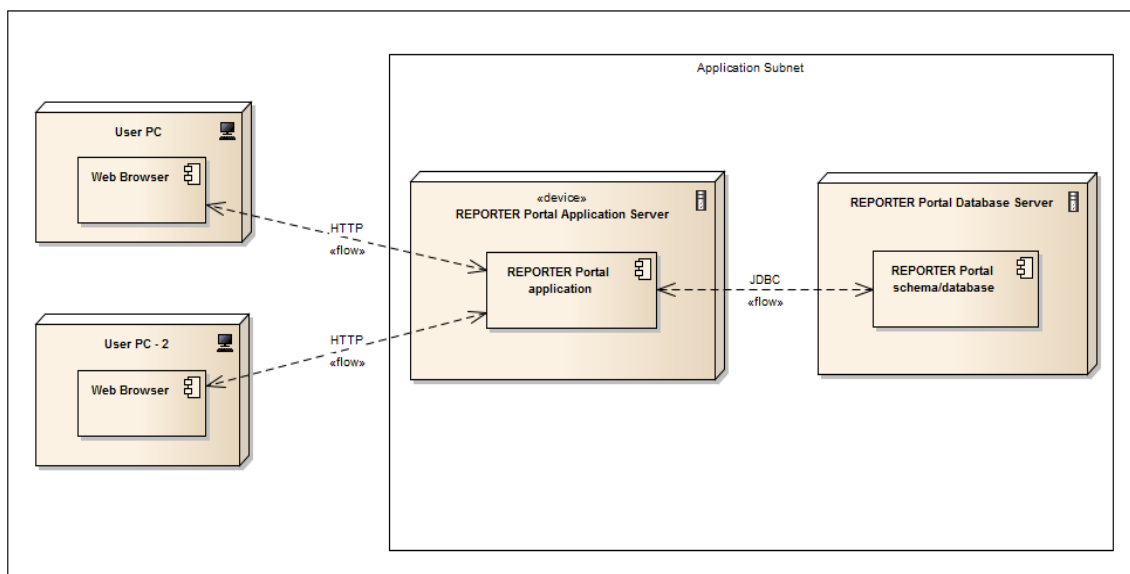
[Chapter 2 – Preparing for Installation](#) to [Chapter 5 – Start/Stop AgileREPORTER Services](#) describes how to install, update, configure, start and stop OFS AgileREPORTER platform.

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 described in [Chapter 2 - Preparing for Installation](#) to correctly configure the OFS AgileREPORTER database.

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 is 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 v8.0.5.1.0. 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.

2.1.1 Supported Operating Systems

OFS AgileREPORTER is supported on the following operating system:

- **Linux**
 - Red Hat Enterprise Linux 7.x
 - Oracle Enterprise Linux 7.x

2.1.2 Required Software

Java Runtime Environment (JRE) (version 8 update 91 or later updates of version 8, Oracle HotSpot™). 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 attempts 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 does 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.
3. 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 uses 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 need SYSDBA privileges to run the last four grants.

- `grant create session to <owner>;`
- `grant create trigger 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 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 trigger 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 8.0.5.1.0 can be downloaded from the Oracle Support Site (<https://support.oracle.com/>) by searching **27878804** under the Patches and Updates tab. 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 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 are 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 8.0.5.1.0 to Download Directory using the following command:

```
unzip OFS_AGILE_REPORTER_8.0.5.1.0_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 the Installer in GUI Mode

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

The following screenshots are taken from a Windows system, but will look similar in Linux 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 is installed, to point to the user desktop system where the PC X Server software is 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

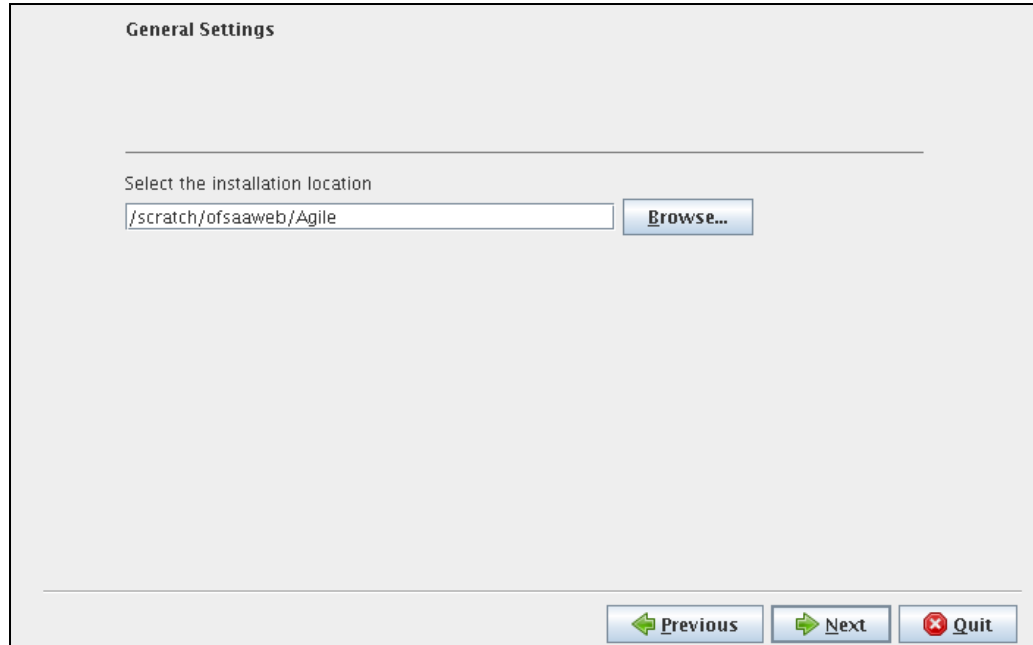
To install OFS AgileREPORTER using the installer GUI, follow these steps (click **Next** to advance after each step):

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.



The initial splash screen is displayed.

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



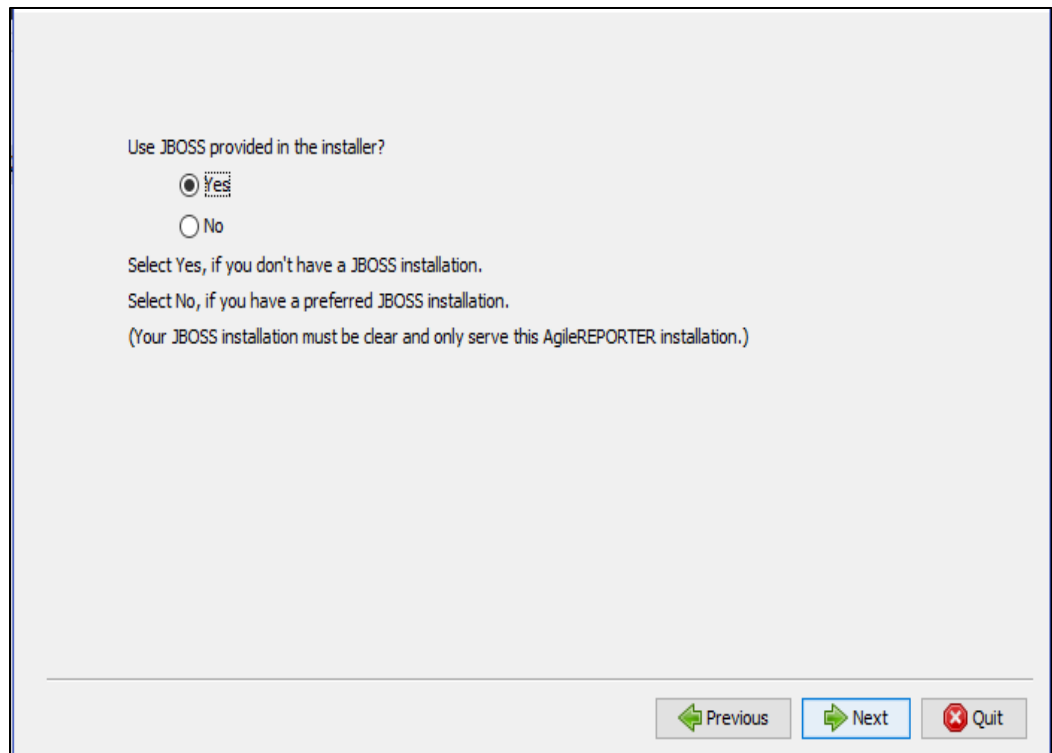
General Settings

Select the installation location

/scratch/ofsaaweb/Agile Browse...

← Previous Next → Quit

5. Select the JBOSS options as applicable.



Use JBOSS provided in the installer?

Yes

No

Select Yes, if you don't have a JBOSS installation.

Select No, if you have a preferred JBOSS installation.

(Your JBOSS installation must be clear and only serve this AgileREPORTER installation.)

← Previous Next → Quit

6. Select the installation mode as applicable.

Install mode

AgileREPORTER Installation Mode

Default(Recommend)

Customized

Previous Next Quit

7. Select the network settings as per the below figure.

Network Settings

HTTP Port: 3080

Enable HTTPS?

Yes

No

HTTPS Port: 8443

Messaging (ActiveMQ) Settings

Port: 61616

Host: localhost

Previous Next Quit

8. Provide the MQ authentication details as per the below figure.

ActiveMQ authentication

Username:

Password:

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

Enable / Disable return workflow

Enable return workflow

Approver count

Note: If the configuration package is using REPORTER metadata, then workflow enablement is setup in the REPORTER environment.

NOTE: If your installation of OFS AgileREPORTER is connected to the REPORTER module, then OFS AgileREPORTER uses approval workflow settings from there instead of showing you this step. You may require a new license to enable the approval workflow feature, contact Lombard Risk.

10. Select how AgileREPORTER users will be authenticated when logging in.



User Authentication

AgileREPORTER User Access type

AgileREPORTER

Single Sign On

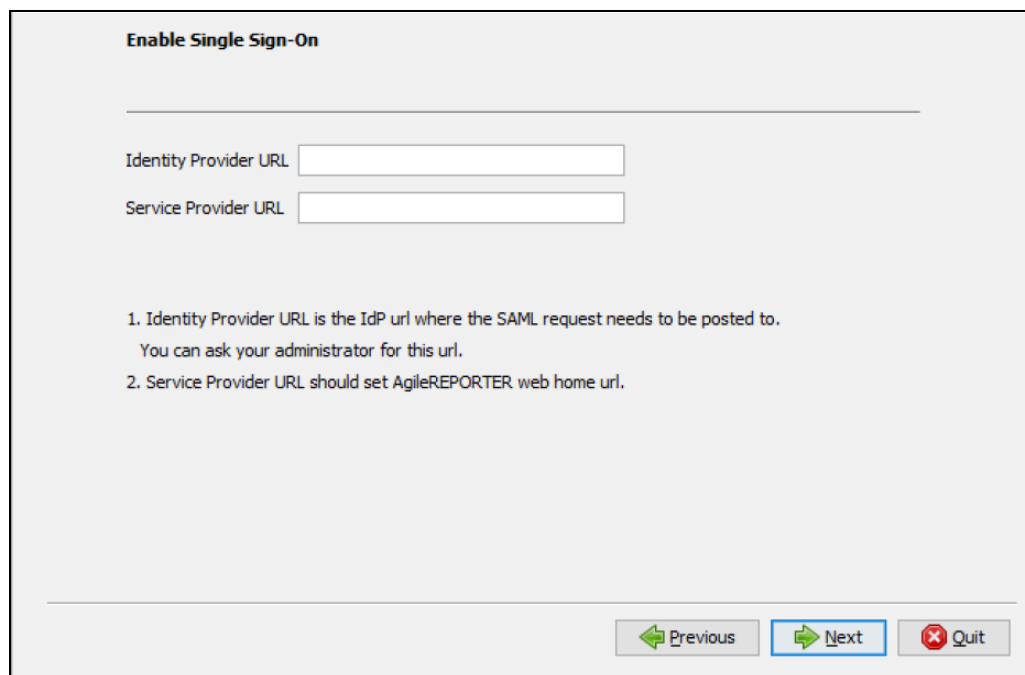
LDAP Integration

[← Previous](#) [Next →](#) [✖ Quit](#)

NOTE:

- **AgileREPORTER:** All users and passwords are managed within the AgileREPORTER database.
- **Single Sign On:** Users are managed in AgileREPORTER database but passwords can be optional in AgileREPORTER. An SSO server is used to provide the user authentication.
- **LDAP Integration:** Users are managed in AgileREPORTER database but passwords can be optional in AgileREPORTER. An LDAP server is used to provide the user authentication.

11. Select **Single Sign On** and then enter values for **Identity Provider URL** and **Service Provider URL**.



Enable Single Sign-On

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: Where OFS AgileREPORTER sends SSO requests, for example to an identity provider set up within your infrastructure.

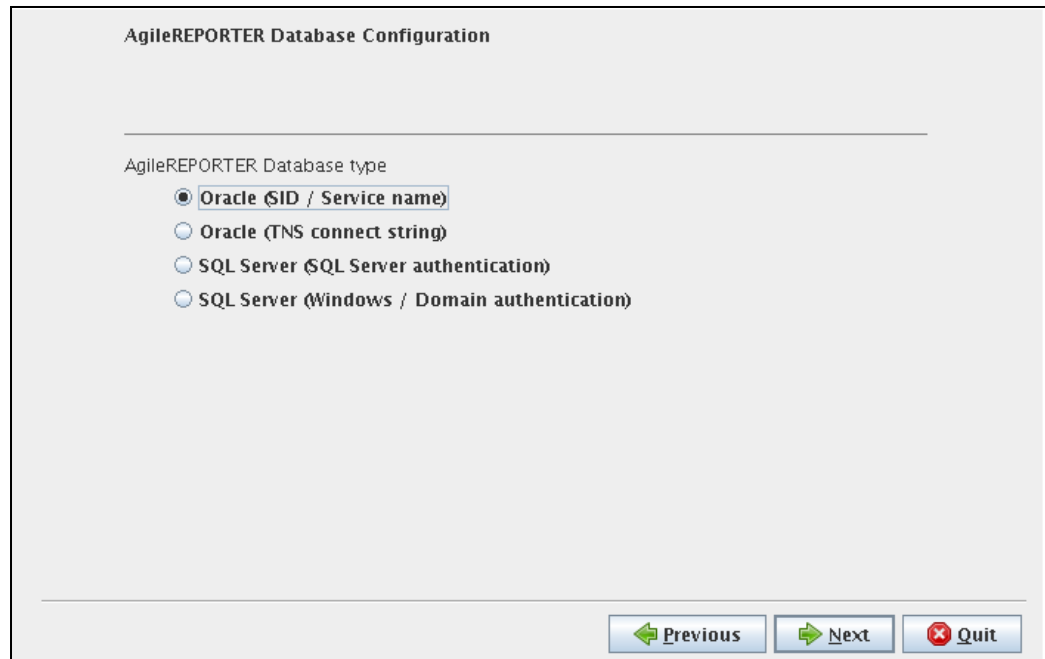
Service Provider URL: Must be [http\(s\)://<hostname>:<port>/agilereporter/](http(s)://<hostname>:<port>/agilereporter/), the OFS AgileREPORTER URL.

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. 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.

12. 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.

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



The screenshot shows a dialog box titled "AgileREPORTER Database Configuration". Inside the dialog, there is a section labeled "AgileREPORTER Database type" with four radio button options: "Oracle (SID / Service name)" (which is selected), "Oracle (TNS connect string)", "SQL Server (SQL Server authentication)", and "SQL Server (Windows / Domain authentication)". At the bottom right of the dialog, there are three buttons: "Previous" (with a left arrow), "Next" (with a right arrow), and "Quit" (with a red X icon).

Oracle (SID / Service name):

The screenshot shows the 'AgileREPORTER Database Configuration' dialog box. It contains the following fields and options:

- Database server host or address: [Empty text box]
- Database server port: [1521]
- Connect by:
 - SID
 - Service name
- SID / Service name: [ORCL]
- AgileREPORTER owner username: [Empty text box]
- AgileREPORTER owner password: [Masked with 7 dots]
- AgileREPORTER application username: [Empty text box]
- AgileREPORTER application password: [Masked with 7 dots]
- AgileREPORTER database rolename: [Empty text box]
- Does this installation require Microsoft SQL Server database support for your data source?

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

Oracle (TNS connect string):

The screenshot shows the 'AgileREPORTER Database Configuration' dialog box. It contains the following fields and options:

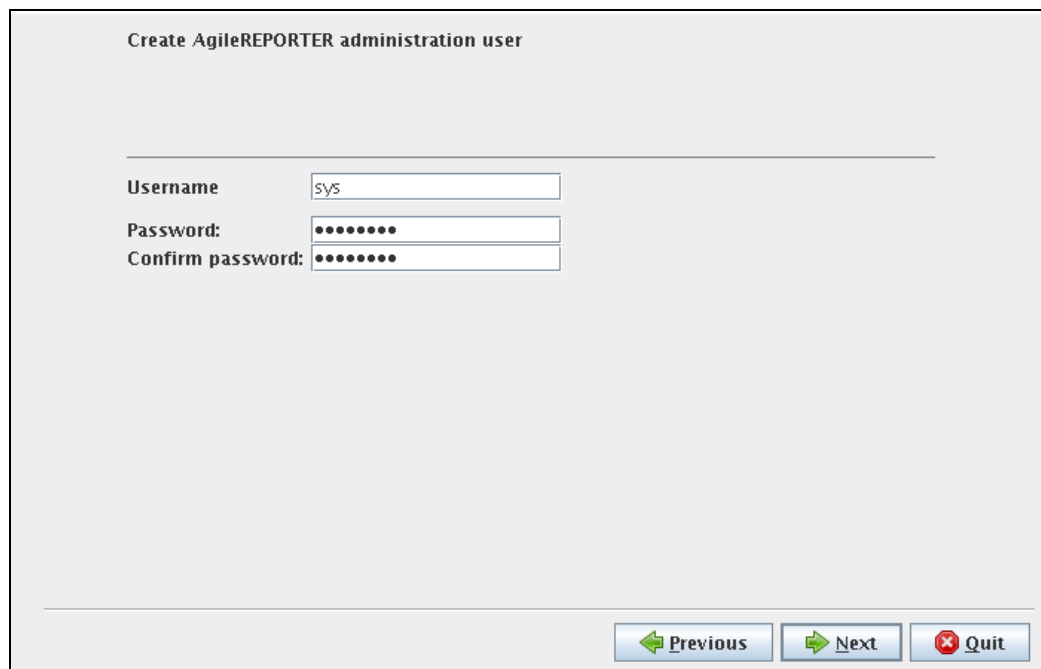
- Oracle TNS connect string: [Empty text box]
- AgileREPORTER owner username: [GL_OWN_14]
- AgileREPORTER owner password: [Masked with 7 dots]
- AgileREPORTER application username: [GL_APP_14]
- AgileREPORTER application password: [Masked with 7 dots]
- Does this installation require Microsoft SQL Server database support for your data source?

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

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

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



Create AgileREPORTER administration user

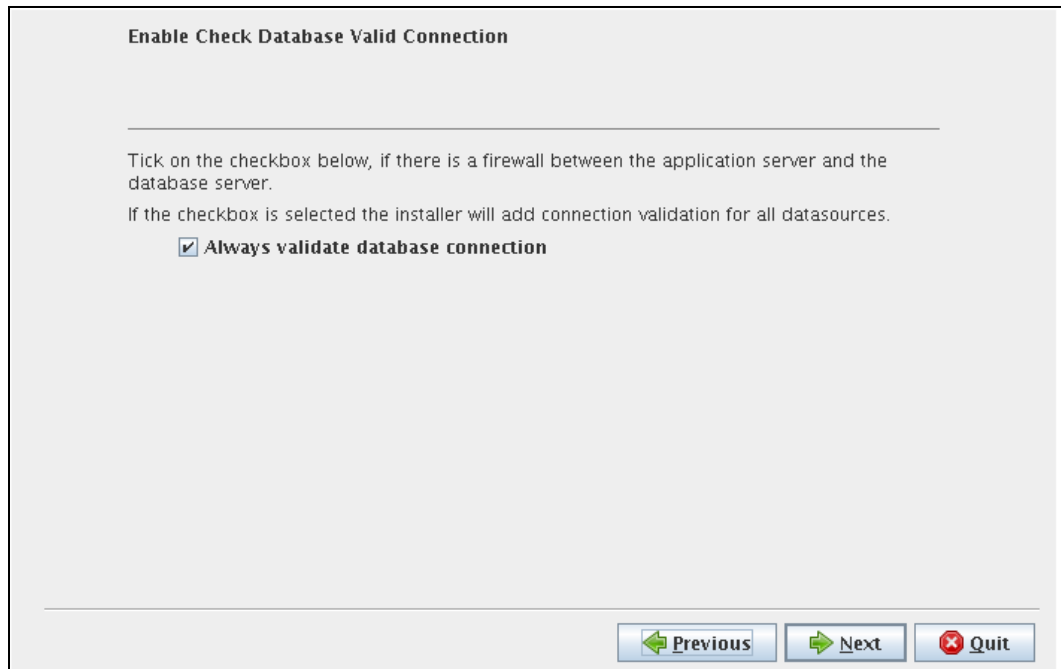
Username:

Password:

Confirm password:

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 is created as an administration user in OFS AgileREPORTER.




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



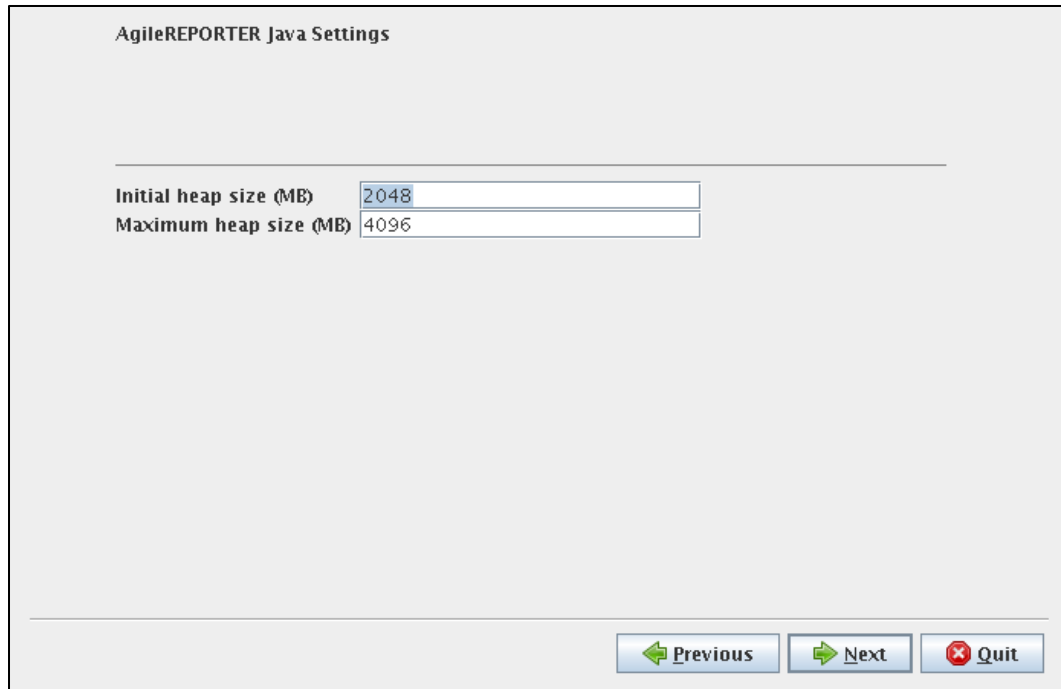
Enable Check Database Valid Connection

Tick on the checkbox below, if there is a firewall between the application server and the database server.
If the checkbox is selected the installer will add connection validation for all datasources.

Always validate database connection




  

15. Enter the Java minimum and maximum heap size.

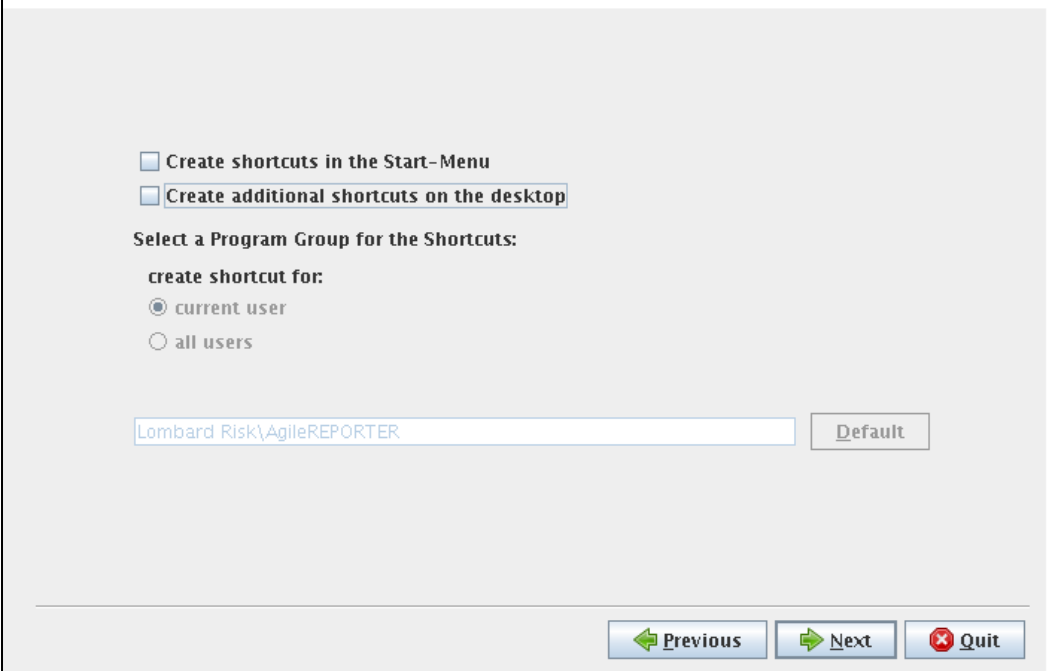


AgileREPORTER Java Settings

Initial heap size (MB)
Maximum heap size (MB)

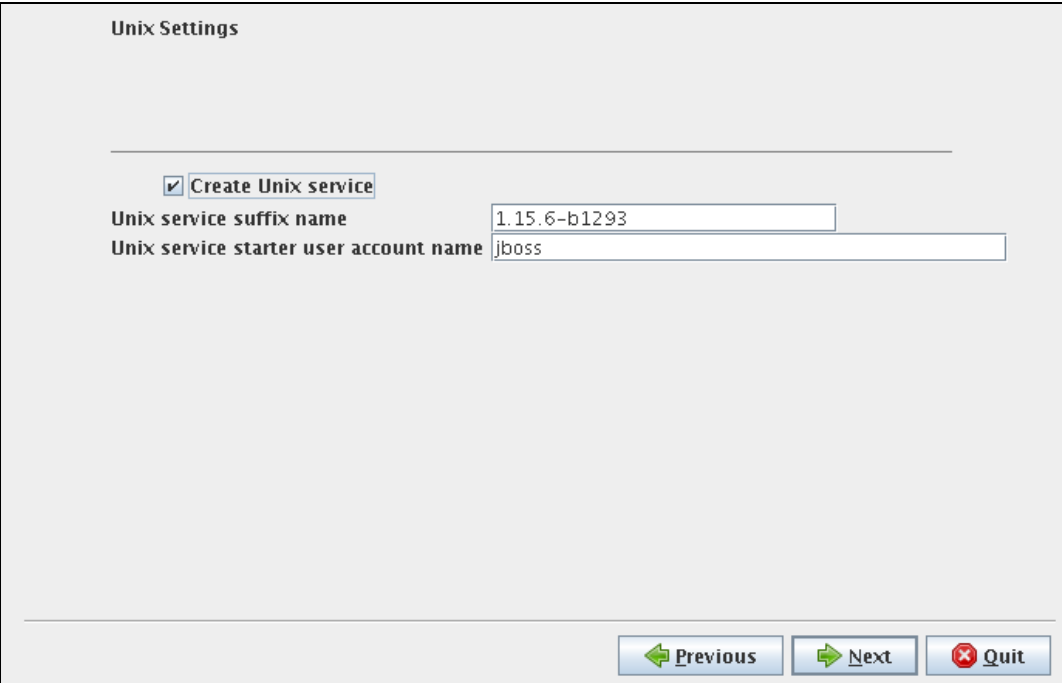
16. Select the shortcut settings if required.



The screenshot shows a dialog box for configuring shortcuts. It contains two unchecked checkboxes: "Create shortcuts in the Start-Menu" and "Create additional shortcuts on the desktop". Below these is the text "Select a Program Group for the Shortcuts:" followed by "create shortcut for:" and two radio buttons: "current user" (selected) and "all users". A text field contains "Lombard Risk\AgileREPORTER" and a "Default" button is to its right. At the bottom are "Previous", "Next", and "Quit" buttons.

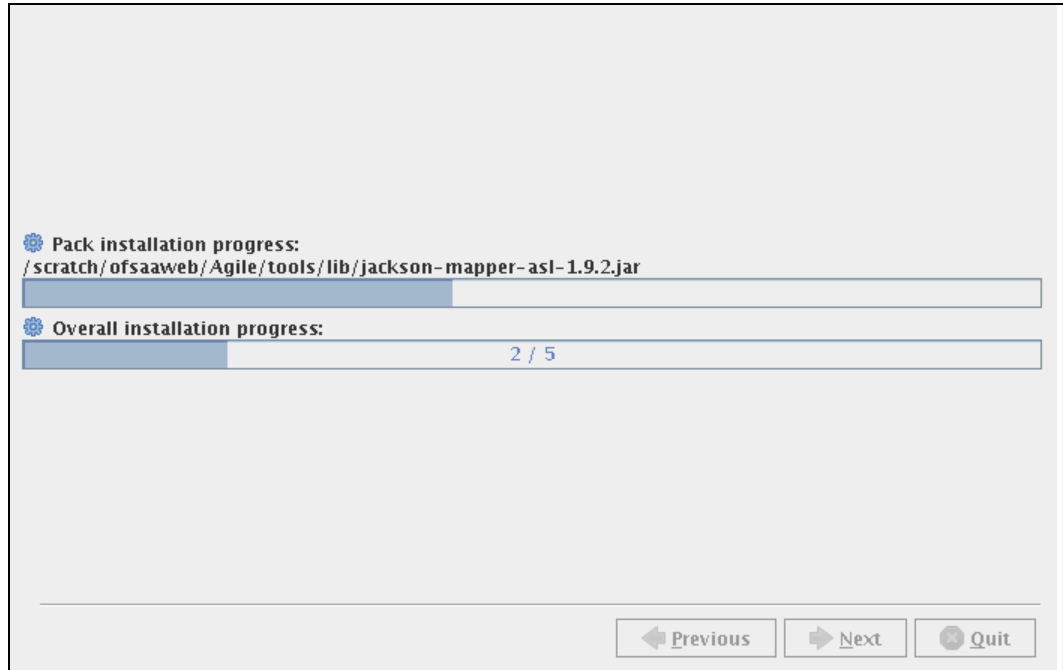
17. Select **Create UNIX service** to create an UNIX service on the server where OFS AgileREPORTER is running.

Enter the **starter user account name**, which is the Linux operating system account that starts the service.



The screenshot shows a dialog box titled "Unix Settings". It has a checked checkbox "Create Unix service". Below it are two text fields: "Unix service suffix name" with the value "1.15.6-b1293" and "Unix service starter user account name" with the value "jboss". At the bottom are "Previous", "Next", and "Quit" buttons.

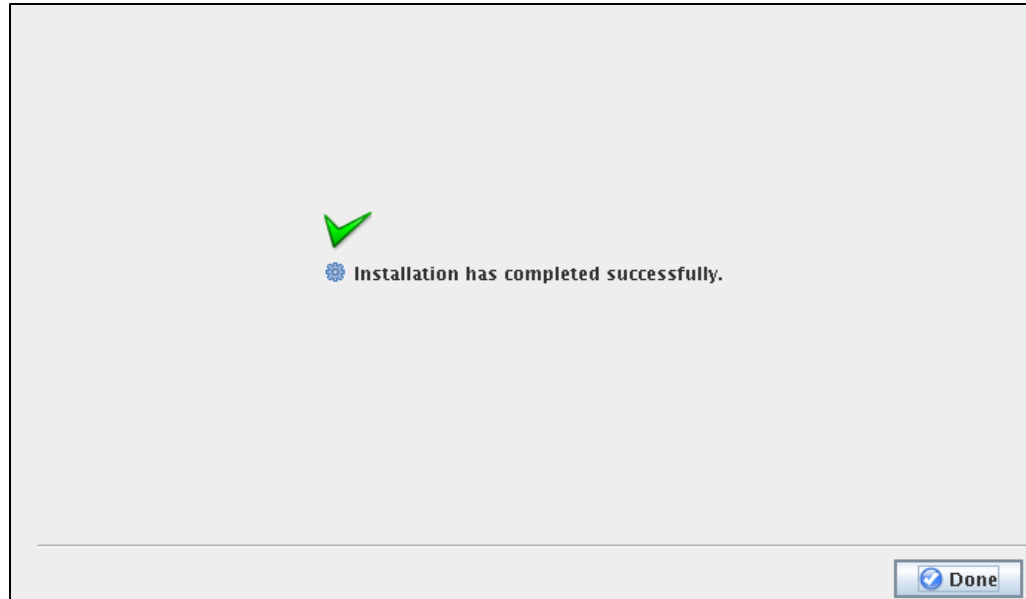
18. Wait for unpacking and installation to complete.



19. Select **Start AgileREPORTER now** (to open immediately) and click **Next**.



20. 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 GUI Mode for Upgrade

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

1. Repeat the section "[3.1.1 Running the Installer in GUI Mode](#)" till you specify the installation path.
2. Specify the installation path and click **Next**.
3. The subsequent GUI screens get auto-populated with the existing information and you must click Next to continue and complete the installation.

3.1.3 Running the Installer in SILENT Mode

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

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
singleLoginModel	Single Login Model	True False	Default Value is False . NOTE: Enter True if you want to restrict one user per session.
main.host.name	Current machine's IP address or host name	Not applicable	For example: 10.184.135.1
activemq.port	AgileREPORTER jBoss AMQ Port	Not applicable	For example: 61616 .

OFS AgileREPORTER Portal
Installation Guide, Release 8.0.5.1.0

Property Name	Description of Property	Permissible values	Comments
agile.reporter.web.app	AgileREPORTER Web Application	True False	Default Value is True .
host.port	AgileREPORTER Web Host Port	Not applicable	For example: 8090 .
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.https	HTTPS Port	Not applicable	(Optional. Required only when HTTPS is used). Default value: host.port.https = 8453
did.retrieve.job	DID Retrieve Job activation	True False	Default Value is True .
data.schedule.export.job	Data Schedule Export Job activation	True False	Default Value is True .
other.brokers	Other ActiveMQ Broker activation	True False	Default Value is False .
other.brokers.hosts	Other ActiveMQ Broker Host Name and Port	Not applicable	For example: 10.184.135.1:8070
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
ocelot.jdbc.username	RP OWNER Schema User Name	Not applicable	For example: AGILE_RPOWNER
ocelot.jdbc.password	RP OWNER Schema Password	Not applicable	For example: password1
ocelot.database.role name	RP Read/Write Role Name	Not applicable	For example: AGILE_RPRW_ROLE

OFS AgileREPORTER Portal
Installation Guide, Release 8.0.5.1.0

Property Name	Description of Property	Permissible values	Comments
ocelot.app.jdbc.user name	RP Application Schema User Name	Not applicable	For example: AGILE_RPAPP
ocelot.app.jdbc.passw ord	RP Application Schema Password	Not applicable	For example: password1
check.db.valid.connect ion.enable	Database Connection Validation activation	True False	Default value: False
ocelot.user.name	AgileREPORTER User Interface Login User Name	Not applicable	For example: RP Admin
ocelot.user.password	AgileREPORTER User Interface Login Password	Not applicable	For example: password1
ocelot.user.authentic ation.mode	Agile Reporter User Interface Login Mode	SYSTEM, SSO, LDAP	Default Value: SYSTEM
sso.idp.url sso.service.provider. url	Agile Reporter UI using SSO Credentials	Not applicable	Optional. Required only if ocelot.user.authenticatio n.mode = SSO
ldap.host ldap.port ldap.baseDN ldap.adminDN ldap.username ldap.password ldap.search.filter ldap.userdn ldap.test.username ldap.test.password	Agile Reporter UI using LDAP Login Model	Not applicable	Optional. Required only if ocelot.user.authenticatio n.mode = LDAP
jvm.parameters.Xms jvm.parameters.Xmx	Java Heap Memory	1024 2048	Optional. For example: jvm.parameters.Xms = 1024 jvm.parameters.Xmx = 2048

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 `<RP_HOME>/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.

3.1.4 Running the Installer in SILENT Mode for Upgrade

To upgrade OFS AgileREPORTER using the installer SILENT mode, follow these steps:

1. Take backup of the `ocelot.properties` file that was used for installing earlier version of AgileREPORTER and keep it for your reference to fill the **Silent.props** file.
2. Repeat the section "[3.1.3 Running the Installer in SILENT Mode](#)" to upgrade AgileREPORTER.

3.1.5 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, you are allowed 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:

- FR Y-9C
- FFIEC-101
- FFIEC-031

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

4.3 Installing Trial Template Packages

This section describes the steps to install sample Template Packages.

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

Parameter	Description	Values
RP_HOME	Agile Reporter Home Directory Install Path.	For example: /scratch/ofsaaapp/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 /OFS_AGILE_REPORTER/Template_Packages/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 `/OFS_AGILE_REPORTER/Template_Packages/bin` directory.
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 `/OFS_AGILE_REPORTER/Template_Packages/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 Services](#) 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 Installation Guide, Release 8.0.5.1.0

May 2018

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
www.oracle.com/us/industries/financial-services/

Copyright © 2018 Oracle Financial Services Software Limited. All rights reserved.

No part of this work may be reproduced, stored in a retrieval system, adopted or transmitted in any form or by any means, electronic, mechanical, photographic, graphic, optic recording or otherwise, translated in any language or computer language, without the prior written permission of Oracle Financial Services Software Limited.

Due care has been taken to make this Installation Guide and accompanying software package as accurate as possible. However, Oracle Financial Services Software Limited makes no representation or warranties with respect to the contents hereof and shall not be responsible for any loss or damage caused to the user by the direct or indirect use of this Installation Guide and the accompanying Software System. Furthermore, Oracle Financial Services Software Limited reserves the right to alter, modify or otherwise change in any manner the content hereof, without obligation of Oracle Financial Services Software Limited to notify any person of such revision or changes.

All company and product names are trademarks of the respective companies with which they are associated.
