

OFS AgileREPORTER Portal

Installation Guide

Release 8.0.7.1.0

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| Created by: Anish Kumar Nair / Naveen Harry D'Cruz | Reviewed by: Subin Menon | Approved by: Siju P B |

Executive Summary

The document consists of all the installation, Pre and Post configuration procedures which have been structured considering all the 8.0.7.1.0 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](#).

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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> for the hearing impaired.

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 |
| JRE | Java Runtime Environment |
| JVM | Java Virtual Machine |
| RBI | Reserve Bank of India |
| US FED | US Federal Reserve |

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.

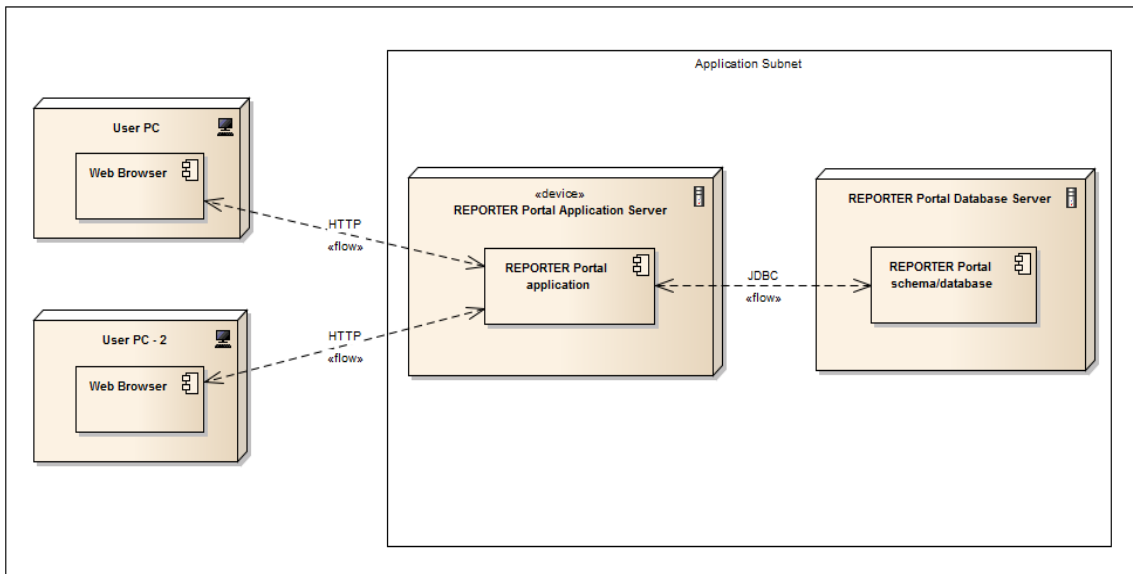
[Chapter 2 – Preparing for Installation](#) till [Chapter 5 – Start/Stop AgileREPORTER Services](#) describes how to install, update, configure, start, and stop the OFS AgileREPORTER platform.

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, see 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 v8.0.7.1.0. 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

The required software for this release are as follows:

- 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 not defined/overridden in the **ocelot.properties** file). This variable can 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.

- Oracle Financial Services Data Foundation (OFSDF) 8.0.7.0.0 (patch **28929704**) plus other prerequisite OFSDF patches (see **Section 3.1 Installer and Installation Prerequisites** of [Oracle Financial Services Data Foundation Installation Guide](#)) should be installed and configured in your Machine ([OHC](#) Documentation Library).

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 finalized 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 require 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

The other requirements for this release are:

- Shut down any OFS AgileREPORTER Web Server 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.
- To use Oracle functionality that fulfils General Data Protection Regulation (GDPR) requirements, set the *db.redacted* property equal to *True* in the *aliasinfo.properties* file.

For example:

```
config.sh -ea OFSAA_DW_DT -iv 1.11.0.1 -alias ``OFSAA DS`` -aif
aliasinfo.properties
```

NOTE: From version 1.15.5, a new property is added related to encrypted passwords. If encrypted passwords are used in the properties file, the *password.encrypted* property in the alias properties file must be uncommented and its value set to True.

2.2 Obtaining the Software

This release of OFS AgileREPORTER Applications Pack 8.0.7.1.0 can be downloaded from the Oracle Support site (<https://support.oracle.com/>). Login and search for **29118578** under the Patches and Updates tab to download.

2.3 Common Installation Activities

The following are the common pre-installation activities that you must 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 8.0.7.1.0 to the downloaded directory using the following command:

```
unzip OFS_AGILE_REPORTER_8.0.7.1.0_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 downloaded 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:

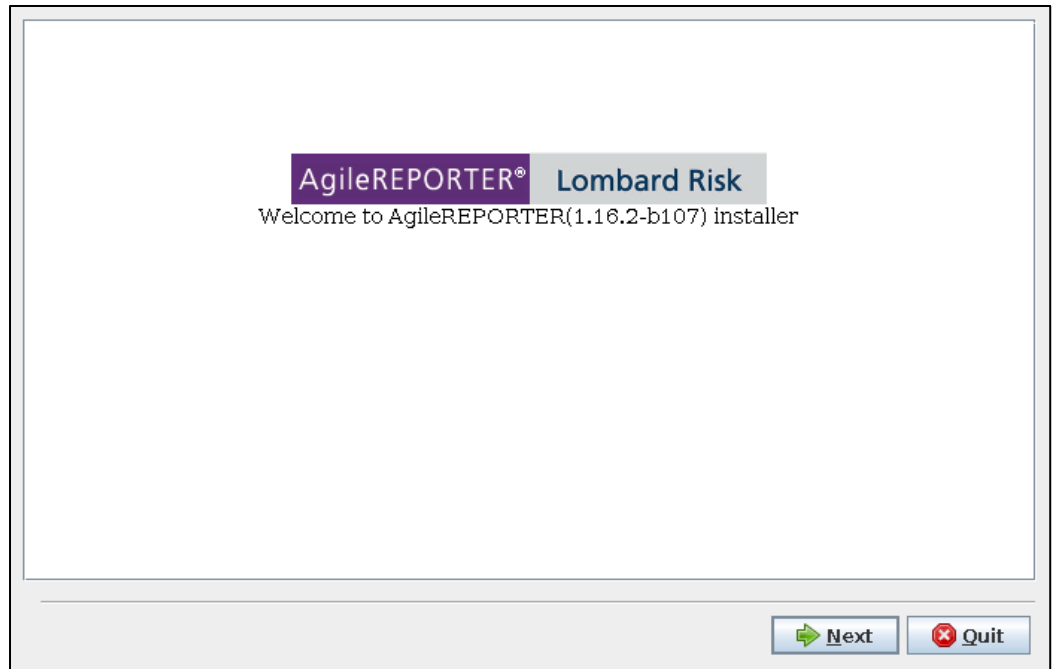
```
export DISPLAY = hostname:n
```

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

For example: 10.xxx.xxx.xxx:0000 or myhostname:0

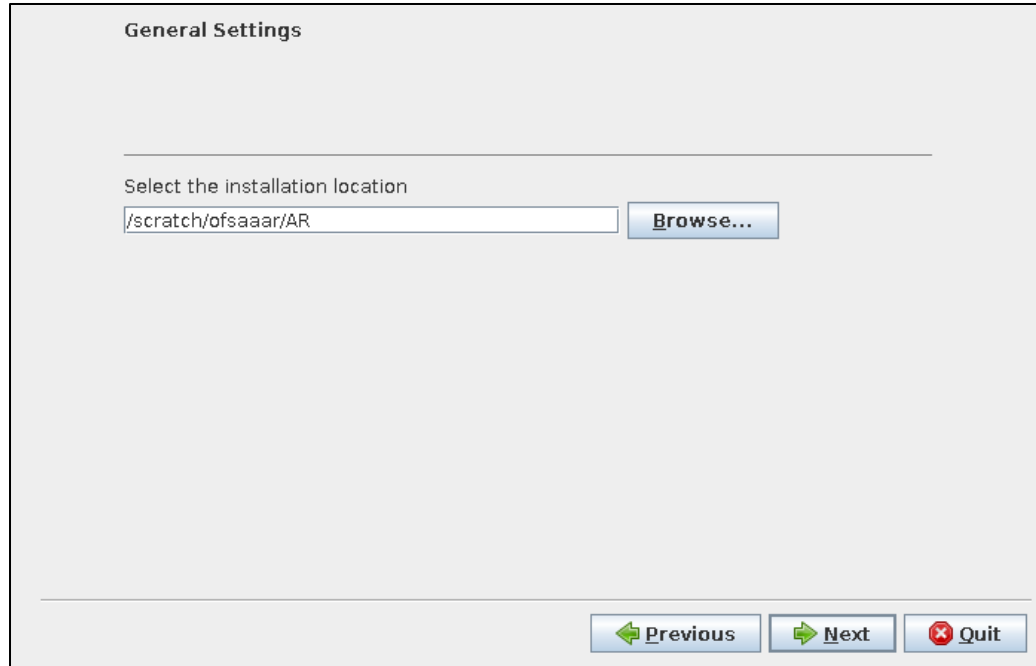
To install OFS AgileREPORTER using the installer GUI, follow these steps (click **Next** to advance after each step):

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. Select **Next** to continue the installation.

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



General Settings

Select the installation location

/scratch/ofsaar/AR

5. The installer checks for OFSAA database when the database details are entered.



Check OFSAA

OFSAA Database type

Oracle (SID / Service name)
 Oracle (TNS connect string)

Database server host or address

Database server port

Connect by

SID
 Service name

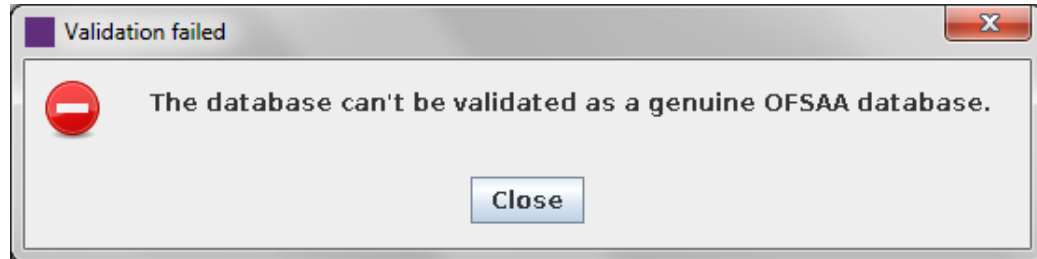
SID / Service name

OFSAA username

OFSAA password

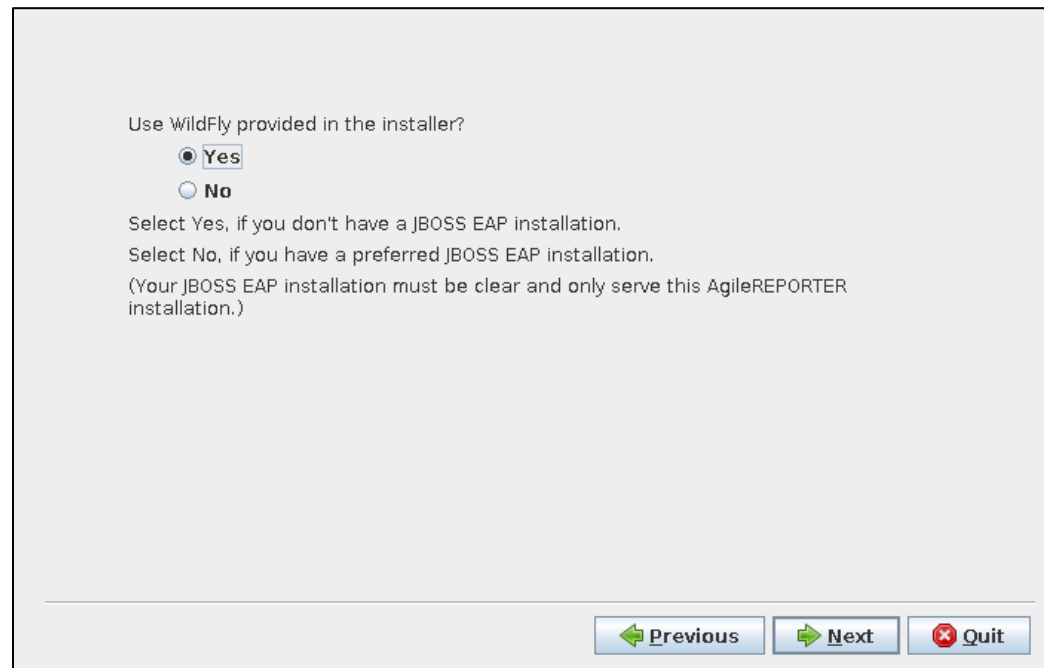
NOTE:

If Oracle FSDf is not available, the following message is displayed.



If Oracle FSDf is available, the following screens continue as part of the installation.

6. Select the JBOSS options as applicable.



7. Select the installation mode as applicable.

Install mode

AgileREPORTER Installation Mode

Default (Recommend)

Customized

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

Network Settings

HTTP Port:

Enable HTTPS?

Yes

No

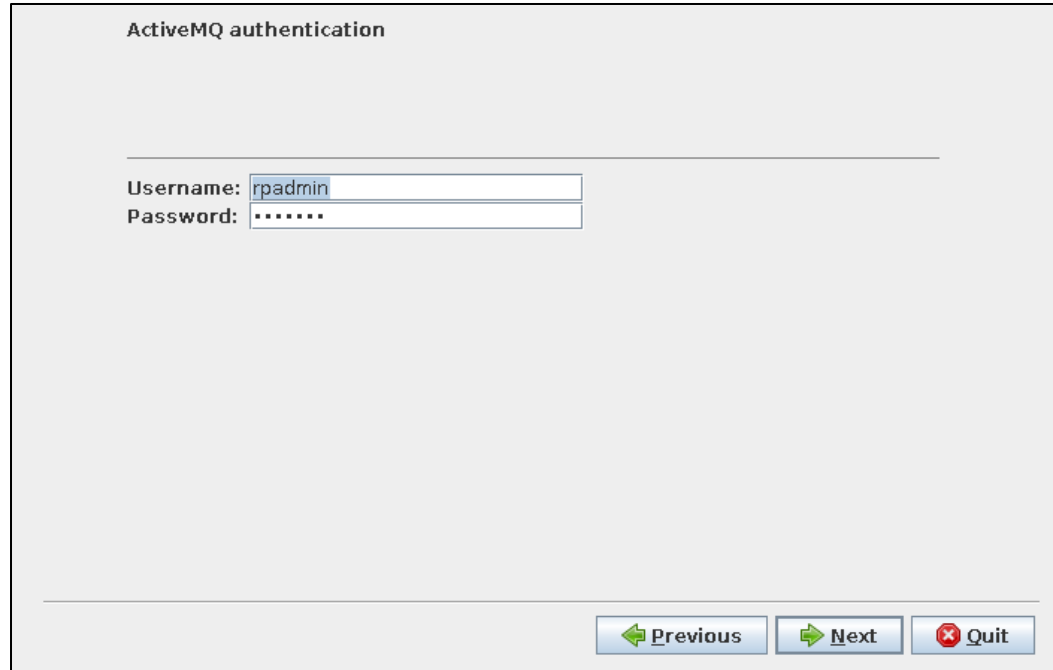
HTTPS Port:

Messaging (ActiveMQ) Settings

Port:

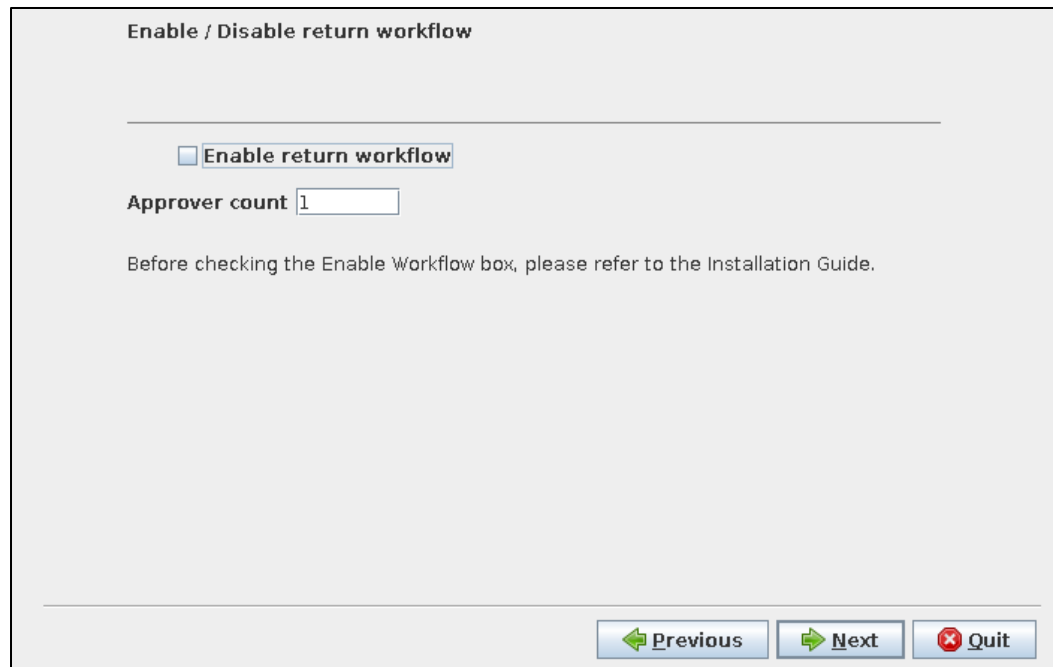
Host:

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



The screenshot shows a window titled "ActiveMQ authentication". It contains two input fields: "Username:" with the text "rpadmin" and "Password:" with seven asterisks. At the bottom right, there are three buttons: "Previous" (with a left arrow), "Next" (with a right arrow), and "Quit" (with a red X icon).

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



The screenshot shows a window titled "Enable / Disable return workflow". It features a checkbox labeled "Enable return workflow" which is currently unchecked. Below it is an input field for "Approver count" with the value "1". A note at the bottom states: "Before checking the Enable Workflow box, please refer to the Installation Guide." At the bottom right, there are three buttons: "Previous" (with a left arrow), "Next" (with a right arrow), and "Quit" (with a red X icon).

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.

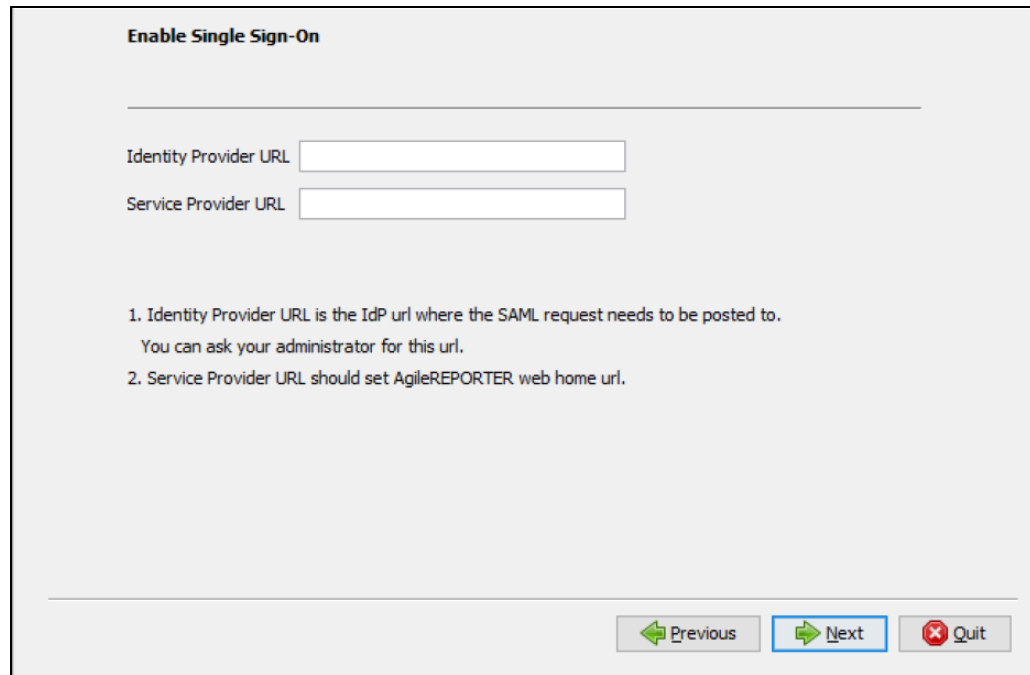
11. Select how AgileREPORTER users will be authenticated when logging in.

The screenshot shows a window titled "User Authentication". Below the title is a horizontal line. Underneath, the text "AgileREPORTER User Access type" is followed by four radio button options: "AgileREPORTER" (which is selected), "Single Sign On", "LDAP Only", and "Mixed - LDAP and AgileREPORTER". Below these options, a note states "Users and passwords are stored in AgileREPORTER database." At the bottom right of the window, there are three buttons: "Previous" with a left-pointing arrow, "Next" with a right-pointing arrow, and "Quit" with a red 'X' icon.

NOTE:

- **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 Only:** Users are managed in AgileREPORTER database but passwords can be optional in AgileREPORTER. An LDAP server is used to provide the user authentication.

12. If you select **Single Sign On**, 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.

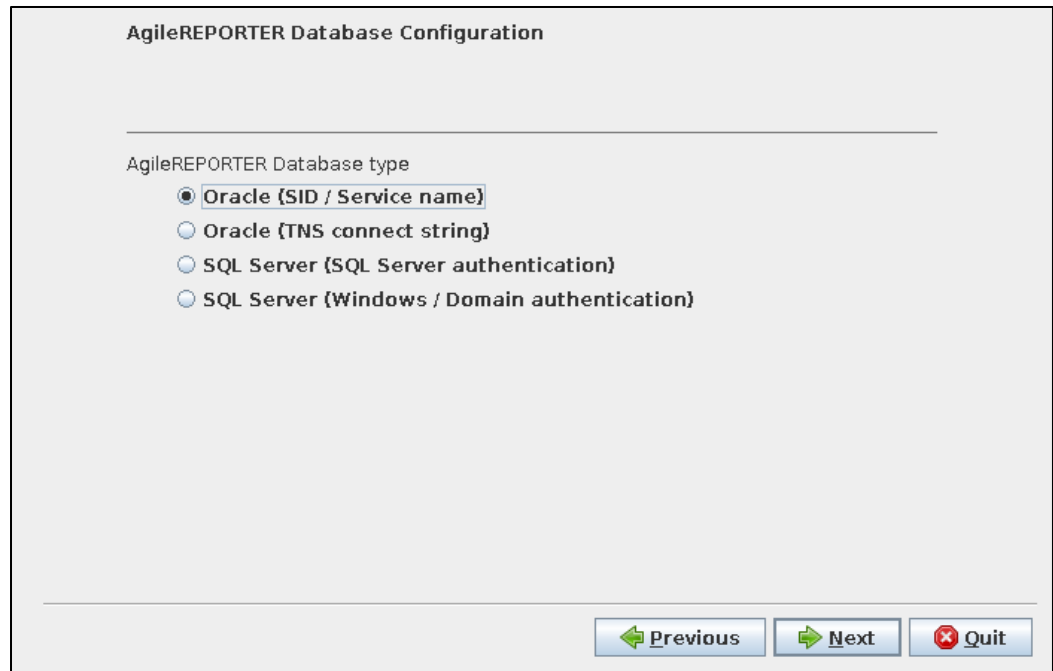
The same username exists in OFS AgileREPORTER.

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

13. 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 image shows a dialog box titled "AgileREPORTER Database Configuration". It contains a section labeled "AgileREPORTER Database type" with four radio button options: "Oracle (SID / Service name)" (selected), "Oracle (TNS connect string)", "SQL Server (SQL Server authentication)", and "SQL Server (Windows / Domain authentication)". At the bottom right, 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):

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 Database Configuration

Oracle TNS connect string

AgileREPORTER owner username

AgileREPORTER owner password

AgileREPORTER application username

AgileREPORTER application password

Does this installation require Microsoft SQL Server database support for your data source?

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**.

14. 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.

15. Select **Yes** for **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 radio box yes selected below, if there is a firewall between the application server and the database server.

If the radio box yes is selected the installer will add connection validation for all datasources.

Always validate database connection.

Yes

No


  

16. Enter the Java minimum and maximum heap size.

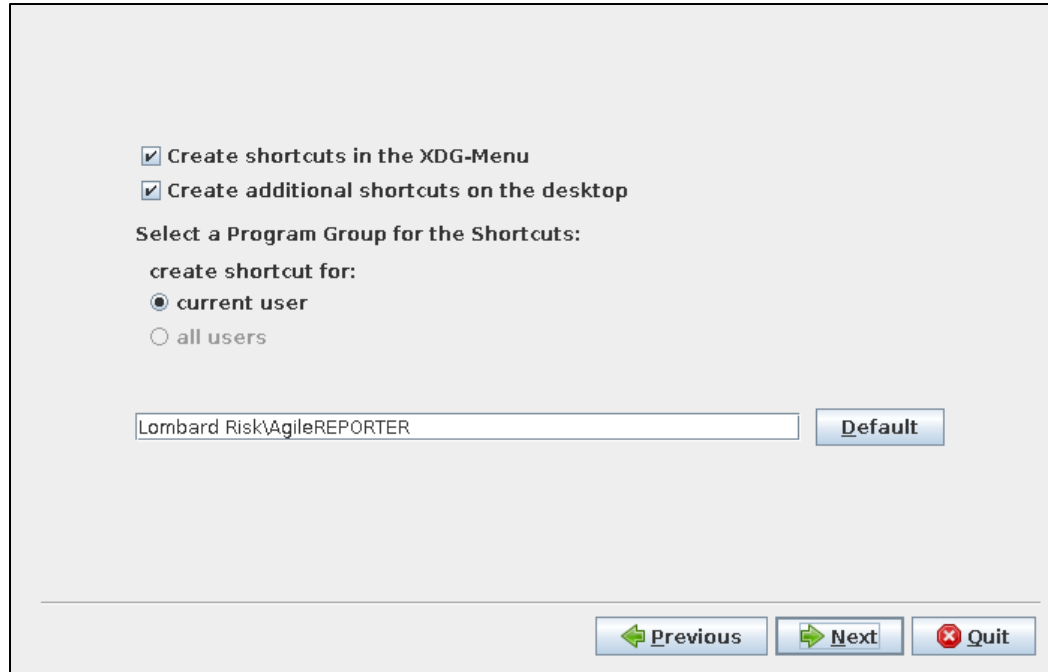
AgileREPORTER Java Settings

Initial heap size (MB)

Maximum heap size (MB)

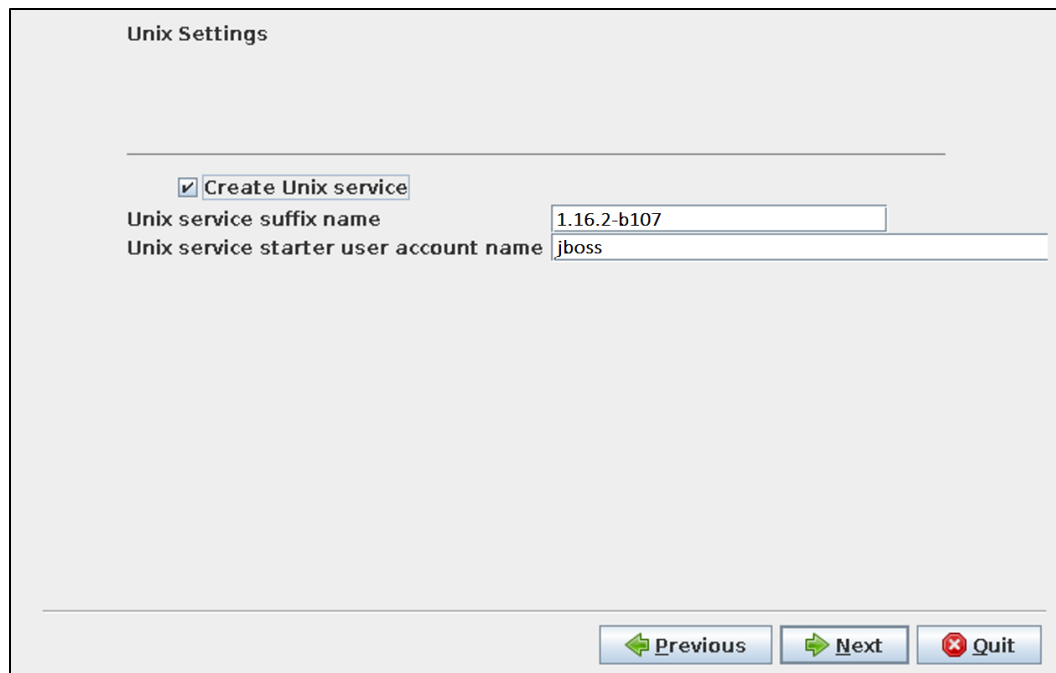
17. Select the shortcut settings if required.



The screenshot shows a dialog box for configuring shortcuts. It contains two checked checkboxes: "Create shortcuts in the XDG-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:". There are two radio buttons: "current user" (selected) and "all users". A text input field contains "Lombard Risk\AgileREPORTER" and a "Default" button is to its right. At the bottom right are three buttons: "Previous", "Next", and "Quit".

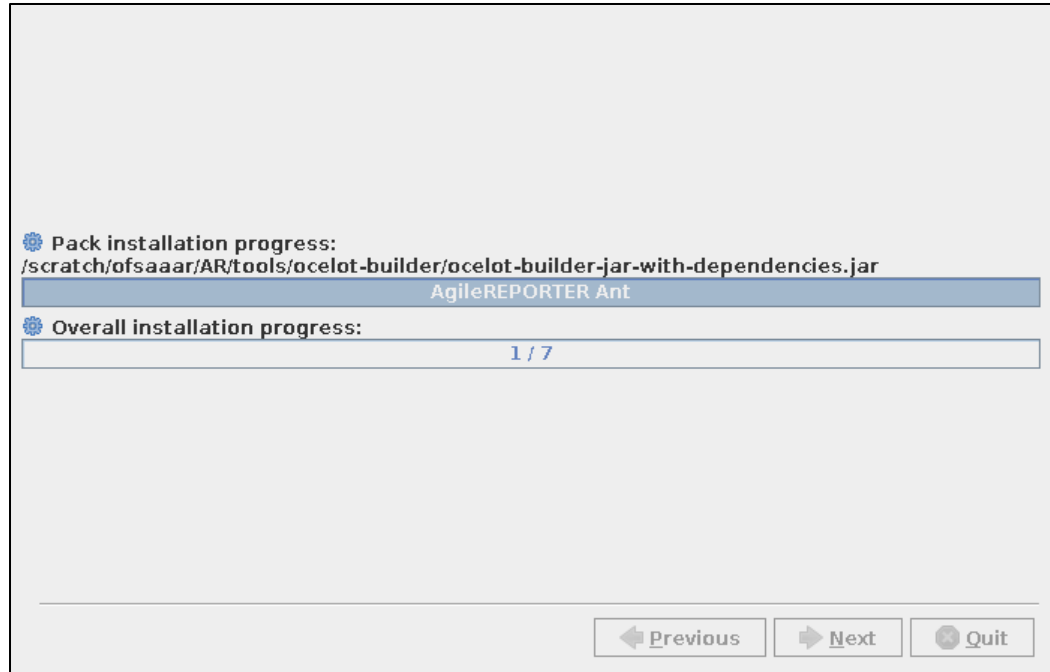
18. Select **Create UNIX service** to create an UNIX service on the server where OFS AgileREPORTER is running.

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 labeled "Create Unix service". Below this are two text input fields: "Unix service suffix name" with the value "1.16.2-b107" and "Unix service starter user account name" with the value "jboss". At the bottom right are three buttons: "Previous", "Next", and "Quit".

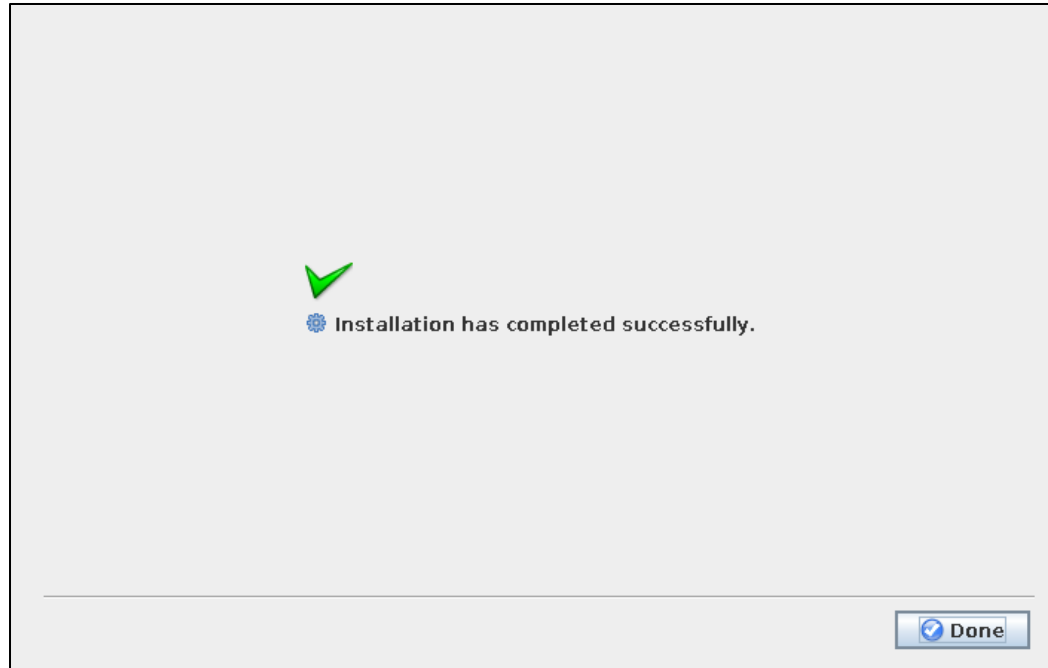
19. Wait for unpacking and installation to complete.



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



21. 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>** or **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.

NOTE: After upgrading from one version of AgileREPORTER to another, any manual changes made to the AgileREPORTER configuration in the previous version must be reapplied to the configuration in the upgraded installation. For example, changes made to the **standalone.xml** file in the previous version will be overwritten when upgrading.

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 must fill the `Silent.props` file from `OFS_AGILE_REPORTER/AgileREPORTER/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 standardized 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, see <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.

NOTE: All passwords mentioned in the `Silent.props` properties file should be encrypted. Execute the following command to encrypt all passwords using the utility `ocelot-encoding-1.1911.11.jar` under the `/utility` folder:

```
java -jar ocelot-encoding-1.1911.11.jar -en "password"
```

| Property Name | Description of Property | Permissible values | Comments |
|---------------------|---|--------------------|---|
| ocelot.install.path | AgileREPORTER Home Directory Install Path | Not applicable | For example: <code>/scratch/ofsaapp/reporter_portal</code> |
| 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.XXX.XXX.XXX |

| Property Name | Description of Property | Permissible values | Comments |
|--------------------------|--|--|---|
| activemq.port | AgileREPORTER jBoss AMQ Port | Not applicable | For example: 61616 . |
| 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 = 0000 |
| 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.XXX.XXX.XXX:0000 |
| ocelot.database.type | Ocelot Database Type | Oracle | Default value is Oracle . |
| ocelot.jdbc.url | Ocelot JDBC URL | For SID: jdbc:oracle:thin:@ IPADDRESS:PORT: SID For Service Name: jdbc:oracle:thin:@// IPADDRESS:PORT/ SERVICE_NAME | For example: jdbc:oracle:thin:@10.XXX.XXX. XXX:0000:AGILERP jdbc:oracle:thin:@//10.XXX.XXX .XXX:0000/SERVICE_NAME |

| Property Name | Description of Property | Permissible values | Comments |
|--|--|--------------------|--|
| 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: 5dfc52b51bd355539bd9a0b76da9b8e7 |
| ocelot.database.role name | RP Read/Write Role Name | Not applicable | For example: AGILE_RPRW_ROLE |
| ocelot.app.jdbc.user name | RP Application Schema User Name | Not applicable | For example: AGILE_RPAPP |
| ocelot.app.jdbc.password | RP Application Schema Password | Not applicable | For example: 5dfc52b51bd355539bd9a0b76da9b8e7 |
| check.db.valid.connection.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: 5dfc52b51bd355539bd9a0b76da9b8e7 |
| ocelot.user.authentication.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.authentication.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.authentication.mode = LDAP |

| Property Name | Description of Property | Permissible values | Comments |
|--|---|---|--|
| jvm.parameters.Xms jvm.parameters.Xmx | Java Heap Memory | 1024 2048 | Optional. For example: jvm.parameters.Xms = 1024 jvm.parameters.Xmx = 2048 |
| ocelot.ofsaa.server | OFSAA Config Database server address | Host Name or IP address of the database server that has FSDF installed | For example: 10.XXX.XXXX.XXX |
| ocelot.ofsaa.port | OFSAA Config Database server port | Database Port | For example: 1521 |
| ocelot.ofsaa.dbType | OFSAA database type (SID / Service name, TNS) | Oracle | Default value is Oracle . |
| ocelot.ofsaa.connectType | OFSAA connect by SID or Service name | SID Service Oracle TNS | For example: SID Service Oracle TNS |
| ocelot.ofsaa.instance | OFSAA SID or Service name to connect to OFSAA CONFIG schema | SID / Service name | For example: ORACLEDB |
| ofsaa.database.tns | OFSAA Connect string | Leave empty if SID or Service name is used. jdbc:oracle:thin:@(TNS String) | For example: jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP)(HOST=10.XXX.XXX.XXX)(PORT=1521))(CONNECT_DATA=(SERVER=DEDICATED)(SERVICE_NAME=RP_SVC))) |
| ocelot.ofsaa.username | OFSAA Config Schema Username | Not applicable | For example: AGILE_RPCOWNER |
| ocelot.ofsaa.password | OFSAA Config Schema password | Not applicable | For example: 5dfc52b51bd355539bd9a0b76da9b8e7 |
| activemq.authentication.user | AgileREPORTER admin user | Not applicable | For example: Rpadmin |

| Property Name | Description of Property | Permissible values | Comments |
|----------------------------------|--|--------------------|---|
| activemq.authentication.password | AgileREPORTER admin password (encrypted) | Not applicable | For example: 5dfc52b51bd355539bd9a0b76da9b8e7 |

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 3.1.3](#)
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.

NOTE: After upgrading from one version of AgileREPORTER to another, any manual changes made to the AgileREPORTER configuration in the previous version must be reapplied to the configuration in the upgraded installation. For example, changes made to the `standalone.xml` file in the previous version will be overwritten when upgrading.

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: <code>/scratch/ofsaapp/reporter_portal</code> |
| 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/AgileREPORTER/log/` directory.

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 the path where AgileREPORTER is installed and then go the `/bin` directory under the installed location.
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 the path where AgileREPORTER is installed and then go the `/bin` directory under the installed location.
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 8.0.7.1.0

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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/

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