

Oracle Financial Services AgileREPORTER Application

Installation Guide

Release 8.1.2.7.0

October 2024

ORACLE
Financial Services

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1 Preface

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

- [Summary](#)
- [Audience](#)
- [Prerequisites for the Audience](#)
- [Access to Oracle Support](#)
- [Conventions and Acronyms](#)

1.1 Summary

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

Before you begin the installation, ensure that you have 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 My Oracle Support.

1.2 Audience

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

1.3 Prerequisites for the Audience

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 or Web Application Server is recommended.

1.4 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.

1.5 Conventions and Acronyms

The conventions and acronyms used in this guide are as follows.

Table 1: Conventions and Description

| 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 |
| 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 |

2 OFS AgileREPORTER

OFS AgileREPORTER is a form and workflow tool that enables the 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 or 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 artifacts:

- Return Template
- Description of the Submission Files for the Regulator
- XBRL Taxonomies
- Validation Rules and Edit Checks
- Bindings to the FSDF Data Model

If you are using an OFSAA - OFS AgileREPORTER Integrated Solution, two configuration packages are required. One is from VERMEG, containing artifacts 1-4 above; and one from Oracle, containing Artifact 5.

[Chapter 3 – Preparing for Installation](#) until [Chapter 6 – Start or Stop AgileREPORTER Services](#) describes how to Install, Update, Configure, Start, and Stop the OFS AgileREPORTER Platform.

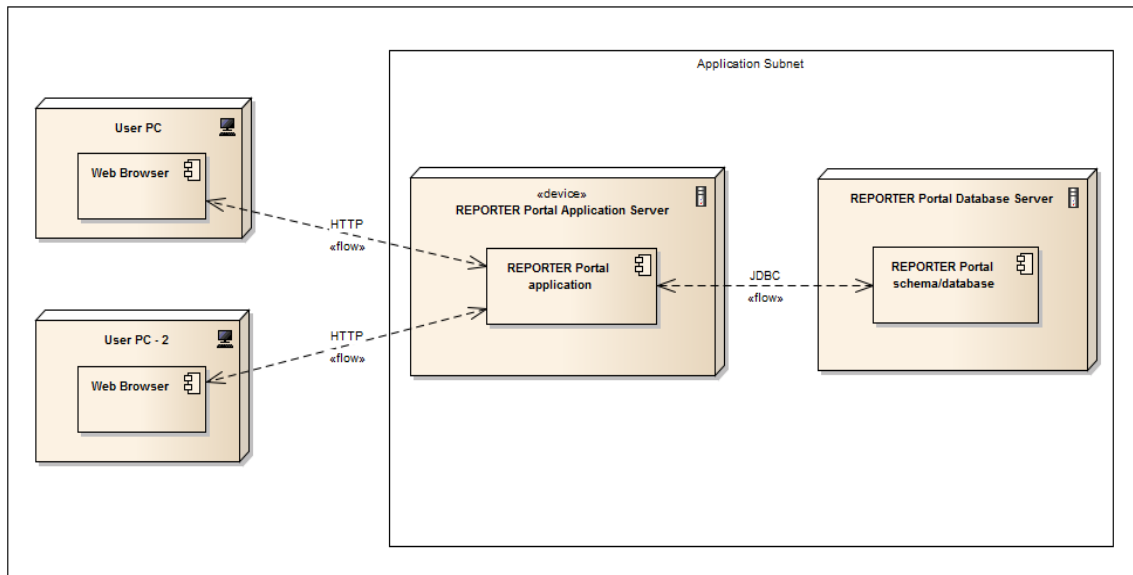
2.1 OFS AgileREPORTER Platform Architecture

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 – the 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 3 – Preparing for Installation](#).

Figure 1: AgileREPORTER Platform Architecture



Installation of OFS AgileREPORTER has a prerequisite described in [Chapter 3 – Preparing for Installation](#) to correctly configure the OFS AgileREPORTER Database.

2.2 OFS AgileREPORTER Modules

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

- **REPORTER:** AgileREPORTER® Suite provides Calculated Return Data and Form (template) Metadata for OFS AgileREPORTER. If the 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.

3 Preparing for Installation

This chapter provides the necessary information to review before installing the OFS AgileREPORTER Applications Pack v8.1.2.7.0.

Topics:

- [Installer and Installation Prerequisites](#)
- [Download the OFS AgileREPORTER Application Pack Installer](#)
- [Common Installation Activities](#)

3.1 Installer and Installation Prerequisites

This section describes the installation prerequisites for OFS AgileREPORTER Pack.

3.1.1 Supported Operating Systems

OFS AgileREPORTER is supported on the following Operating System:

- Linux
 - Red Hat Enterprise Linux 8.x and 9.x
 - Oracle Enterprise Linux 8.x and 9.x

3.1.2 Required Software

The required software for this release are as follows:

- Java Runtime Environment (JRE) (version 8 update 202 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 is Java used?

If the Application Server that OFS AgileREPORTER is installed on has multiple versions of Java installed, OFS AgileREPORTER attempts to use Java in the following order, moving to the next location if Java cannot be found:

- `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.
- `JAVA_HOME` defined at the system level (if not defined or overridden in the `ocelot.properties` file). This variable can be shared by other applications, therefore, 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`**

Ensure that 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 the `java -version` can be run at the command line. If yes, the OFS AgileREPORTER uses the same version.

- Oracle Financial AgileREPORTER 8.0.9.2.0 (Patch ID **31830937**) if upgrading from an earlier version. This is not applicable for a fresh installation.
- Oracle Financial Services Data Foundation (OFSDf) 8.1.0.0.0 (Patch ID) plus other prerequisite OFSDf Patches (see **Section 4.1 Pre-installation Checklist** of [OFSDf Installation Guide](#)) should be installed and configured on your Machine.

3.1.3 Supported Databases

OFS AgileREPORTER supports Oracle Database 19c.

| | |
|-------------|--|
| NOTE | This guide mentions SQL Server throughout. Do not use these SQL Server Options and Settings. Full SQL Server Support will be finalized in a later version. |
|-------------|--|

3.1.3.1 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 the schemas as follows:

- 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):

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):

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 or Login examples

Following are examples of DDL (Owner) and DML (App) Schemas or 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 the Application User to access the table of the Schema Owner

- CREATE ROLE **RP\$RW_ROLE**;
- CREATE ROLE **RP\$R_ROLE**;
- grant **RP\$RW_ROLE** to **RP\$APP**;

3.1.4 Other Requirements

The other requirements for this release are as follows:

- Shut down any OFS AgileREPORTER Web Server currently running on the Target Server.
- Ensure that there is a free service port for the 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 fulfills 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
```

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`.

3.2 Obtaining the Software

This release of OFS AgileREPORTER Applications Pack 8.1.2.7.0 can be downloaded from [My Oracle Support](#) website. Log in and search for **37212313** under **Patches and Updates** and download the `p37212313_81200_Linux-x86-64.zip` archive file.

You need to have a valid Oracle Account in order to download the software.

3.3 Common Installation Activities

You must carry out the common pre-installation activities before installing the OFS AgileREPORTER Application.

Topics:

- [Identifying the Installation Directory](#)
- [Copying and Extracting the Software](#)

3.3.1 Identifying the Installation Directory

For installing any OFS AgileREPORTER Applications, the following directory can be created.

- **OFS AgileREPORTER Download Directory (Optional):** Create a Download Directory and copy the OFS AgileREPORTER Application Installer File (Archive). You can copy the downloaded installer or patches in this directory.

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

3.3.2 Copying and Extracting the Software

After 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 If 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 8.1.2.7.0 to the downloaded directory using the following command:

```
unzip p37212313_81200_Linux-x86-64.zip
```

NOTE **DO NOT** rename the Application Pack Installer Folder name on extraction from the archive.

5. Give the following permission to the Installer Folder. Navigate to the downloaded directory and execute the command:

```
chmod -R 755 OFS_AGILE_REPORTER
```

4 Installing the OFS AgileREPORTER Applications Pack

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

4.1 Running the OFS AgileREPORTER Applications Pack Installer

OFS AgileREPORTER Applications Pack Installation supports the following modes of installation:

- [Upgrades from Prior Versions of OFSAA AgileREPORTER](#)
- [Running the Installer in GUI Mode](#)
- [Running the Installer in GUI Mode for Upgrade](#)
- [Running the Installer in SILENT Mode](#)
- [Running the Installer in SILENT Mode for Upgrade](#)
- [Verifying the Log File](#)

4.1.1 Upgrades from Prior Versions of OFSAA AgileREPORTER

If you are using older versions of OFSAA AgileReporter, see the following table on the supported AR Upgrade Path to upgrade from an older version to the latest version of AgileREPORTER.

Table 2: Supported OFSAA AgileREPORTER Upgrade Versions

| Upgrade to and Upgrade from | 8.0.6.1.0 | 8.0.7.3.0 | 8.0.7.4.0 | 8.0.8.0.0 | 8.0.8.1.0 | 8.0.9.0.0 | 8.0.9.6.5 | 8.1.0.0.0 | 8.1.0.0.1 | 8.1.0.0.2 | 8.1.1.0.0 | 8.1.2.0.0 | 8.1.2.1.0 | 8.1.2.2.0 | 8.1.2.3.0 | 8.1.2.4.0 | 8.1.2.5.0 | 8.1.2.6.0 | 8.1.2.7.0 |
|-----------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 8.0.6.1.0 | Yes | Yes | Yes | Yes | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
| 8.0.7.3.0 | | Yes | Yes | Yes | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
| 8.0.7.4.0 | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.0.8.0.0 | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.0.8.1.0 | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.0.9.0.0 | | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.0.9.6.5 | | | | | | | Yes | No | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.1.0.0.0 | | | | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |

| Upgrade to and Upgrade from | 8.0.6.1.0 | 8.0.7.3.0 | 8.0.7.4.0 | 8.0.8.0.0 | 8.0.8.1.0 | 8.0.9.0.0 | 8.0.9.6.5 | 8.1.0.0.0 | 8.1.0.0.1 | 8.1.0.0.2 | 8.1.1.0.0 | 8.1.2.0.0 | 8.1.2.1.0 | 8.1.2.2.0 | 8.1.2.3.0 | 8.1.2.4.0 | 8.1.2.5.0 | 8.1.2.6.0 | 8.1.2.7.0 |
|-----------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 8.1.0.0.1 | | | | | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.1.0.0.2 | | | | | | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.1.1.0.0 | | | | | | | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.1.2.0.0 | | | | | | | | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.1.2.1.0 | | | | | | | | | | | | | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.1.2.2.0 | | | | | | | | | | | | | | Yes | Yes | Yes | Yes | Yes | Yes |
| 8.1.2.3.0 | | | | | | | | | | | | | | | Yes | Yes | Yes | Yes | Yes |
| 8.1.2.4.0 | | | | | | | | | | | | | | | | Yes | Yes | Yes | Yes |
| 8.1.2.5.0 | | | | | | | | | | | | | | | | | Yes | Yes | Yes |
| 8.1.2.6.0 | | | | | | | | | | | | | | | | | | Yes | Yes |

4.1.2 Running the Installer in GUI Mode

Before proceeding, ensure that all preinstallation requirements listed in [Chapter 3 - Preparing for Installation](#) are met.

ATTENTION

In the previous release of AgileREPORTER (20.3), the Log4j Library was replaced with the Logback Library in the application. From this release onwards, since the application includes ZooKeeper which also uses Log4j, all the instances of Log4j is automatically removed from Zookeeper.

NOTE

The following screenshots are taken from a Windows System; however, they look similar in Linux Configuration for GUI Mode Installation.

To install this product in GUI Mode, ensure the following software and configuration are available:

- Install and configure any PC X Server Software such as Open Text Exceed (formerly Hummingbird Exceed) on the Desktop System of the user from which the installation is triggered.
- Configure the DISPLAY variable.
- Ensure you set the DISPLAY variable (in user. profile) on the system on which the OFSAA Infrastructure is installed, to point to the Desktop System of the user where the PC X Server Software is installed.

Syntax:

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

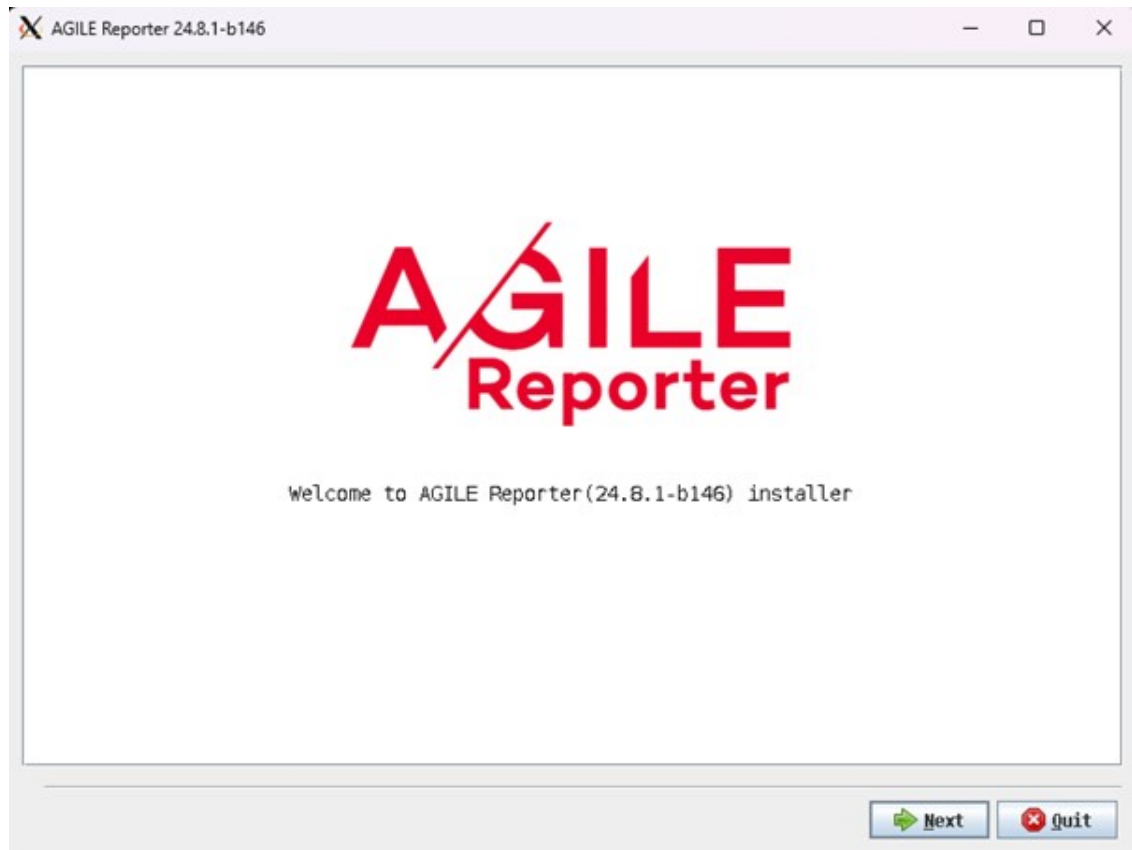
where the **hostname** is the IP Address or Hostname of the User's Desktop System and **n** is the sequence number (usually 0).

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 the OFS AgileREPORTER Installer Kit is unzipped.
2. Navigate to the OFS_AGILE_REPORTER/AgileREPORTER/Bin Directory.
3. Execute the `./Setup.sh GUI` command in the Console.
The initial Splash Screen is displayed.

Figure 2: Initial Splash Screen



4. Select **Next** to continue the installation.
5. Select the location where OFS AgileREPORTER must be installed.

Figure 3: General Settings Screen

The screenshot shows the 'General Settings' window. At the top, it says 'General Settings'. Below that, there is a section titled 'Select the installation location'. Under this section, there is a text input field containing the path '/scratch/ofsaaar/AR' and a 'Browse...' button to its right. At the bottom of the window, there are three buttons: 'Previous' (with a left arrow), 'Next' (with a right arrow), and 'Quit' (with a red X icon).

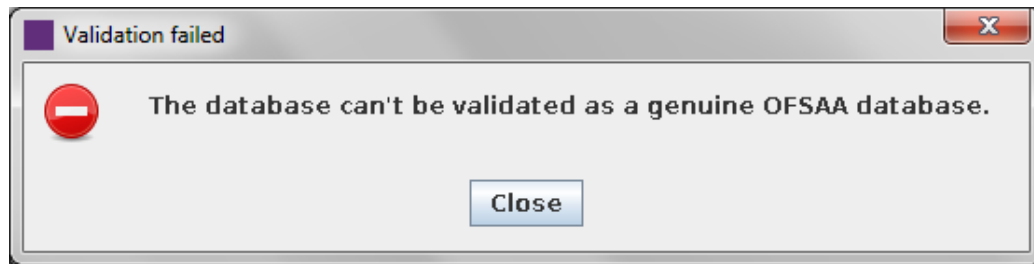
The installer checks for the OFSAA Database when the database details are entered.

Figure 4: Check OFSAA Database Screen

The screenshot shows the 'Check OFSAA' window. At the top, it says 'Check OFSAA'. Below that, there is a section titled 'OFSAA Database type'. Under this section, there are two radio buttons: 'Oracle (SID / Service name)' (which is selected) and 'Oracle (TNS connect string)'. Below the radio buttons, there are three text input fields: 'Database server host or address' (empty), 'Database server port' (containing '1521'), and 'Connect by' (empty). Below the 'Connect by' field, there are two radio buttons: 'SID' (which is selected) and 'Service name'. Below the radio buttons, there are two text input fields: 'SID / Service name' (containing 'ORACLEDB') and 'OFSAA username' (containing 'GRP_FSDFCNF'). Below the 'OFSAA username' field, there is a text input field for 'OFSAA password' (containing '*****'). At the bottom of the window, there are three buttons: 'Previous' (with a left arrow), 'Next' (with a right arrow), and 'Quit' (with a red X icon).

NOTE If Oracle FSD is unavailable, the following message is displayed.

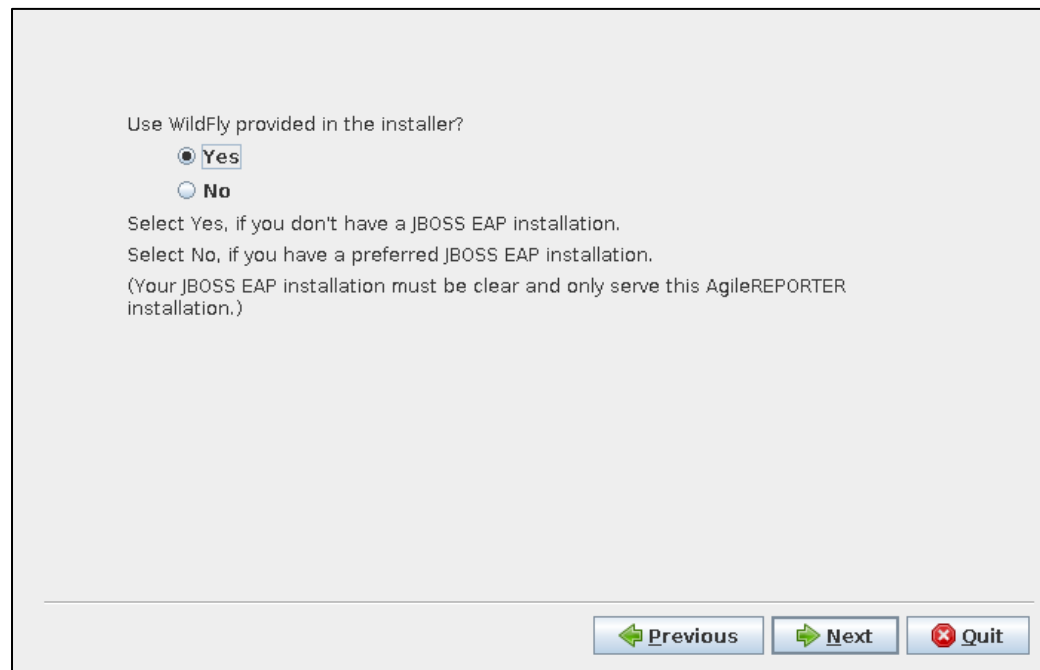
Figure 5: Validation Screen



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

6. Select the JBOSS Options as applicable.

Figure 6: JBoss Options Screen



7. Select the Installation Mode as applicable.

Figure 7: Install Mode Screen

The screenshot shows a window titled "Install mode". Below the title bar, there is a horizontal line. Underneath the line, the text "AgileREPORTER Installation Mode" is displayed. Below this text, there are two radio button options: "Default (Recommend)" which is selected, and "Customized". At the bottom right of the window, there are three buttons: "Previous" with a left arrow, "Next" with a right arrow, and "Quit" with a red X icon.

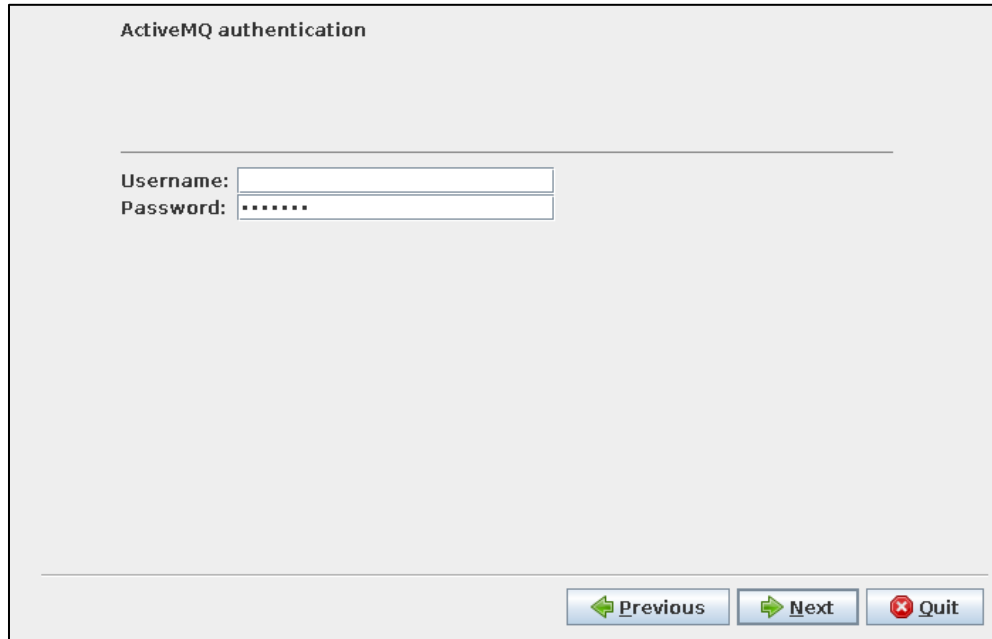
8. Select the Network Settings as applicable.
To enable HTTPS for AgileREPORTER see the *Enable HTTPS for AgileREPORTER* Section in the [AgileREPORTER 20.4 - Installation and Administration Guide.zip](#).

Figure 8: Network Settings Screen

The screenshot shows a window titled "Network Settings". Below the title bar, there is a horizontal line. Underneath the line, the "HTTP Port:" is followed by a text box containing "8080". Below this, the text "Enable HTTPS?" is followed by two radio button options: "Yes" and "No", with "No" being selected. Below the radio buttons, the "HTTPS Port:" is followed by a text box containing "8443". Underneath this, the text "Messaging (ActiveMQ) Settings" is displayed. Below this text, there are two labels: "Port:" followed by a text box containing "61616", and "Host:" followed by an empty text box. At the bottom right of the window, there are three buttons: "Previous" with a left arrow, "Next" with a right arrow, and "Quit" with a red X icon.

9. Provide the MQ Authentication details.

Figure 9: ActiveMQ Authentication Screen



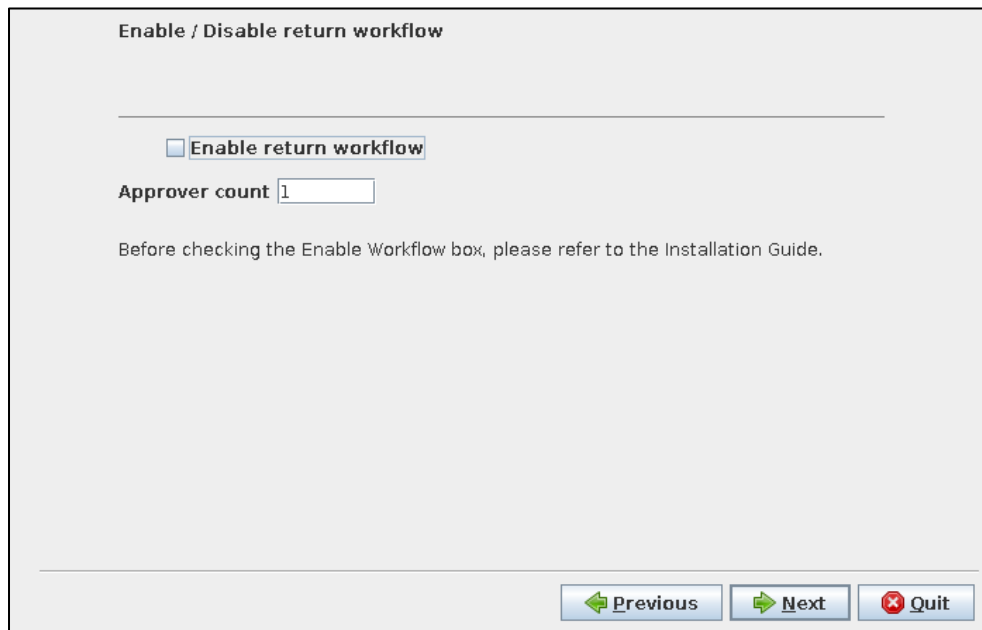
ActiveMQ authentication

Username:

Password:

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

Figure 10: Enable or Disable return workflow Screen



Enable / Disable return workflow

☐ Enable return workflow

Approver count

Before checking the Enable Workflow box, please refer to the Installation Guide.

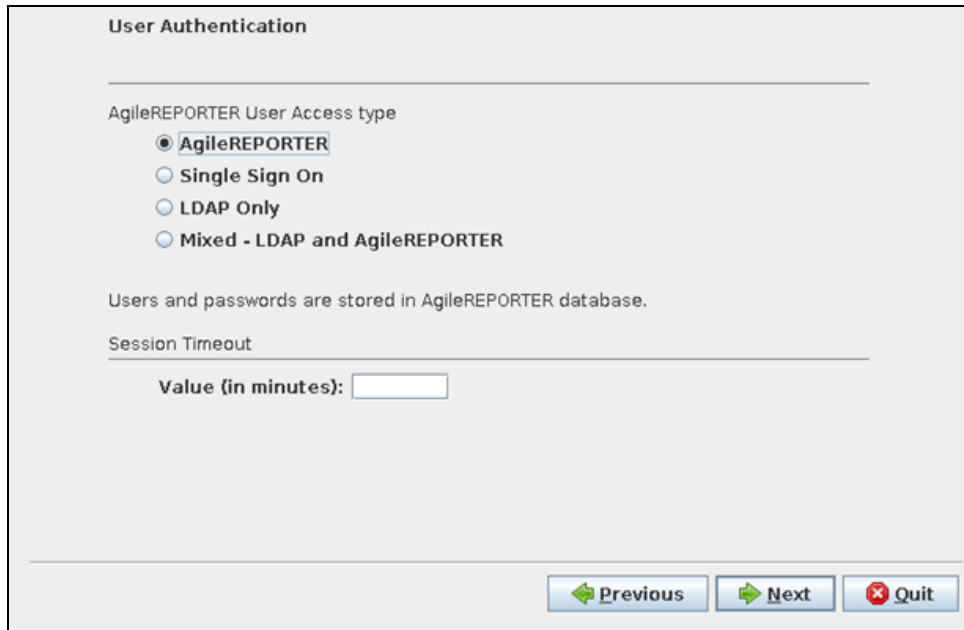
NOTE The following screenshots are taken from a Windows System but will look similar in Linux Configuration for GUI Mode Installation.

If your installation of OFS AgileREPORTER is connected to the REPORTER Module, 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 VERMEG.

11. Select how AgileREPORTER Users must be authenticated when logging in.

Figure 11: User Authentication Screen

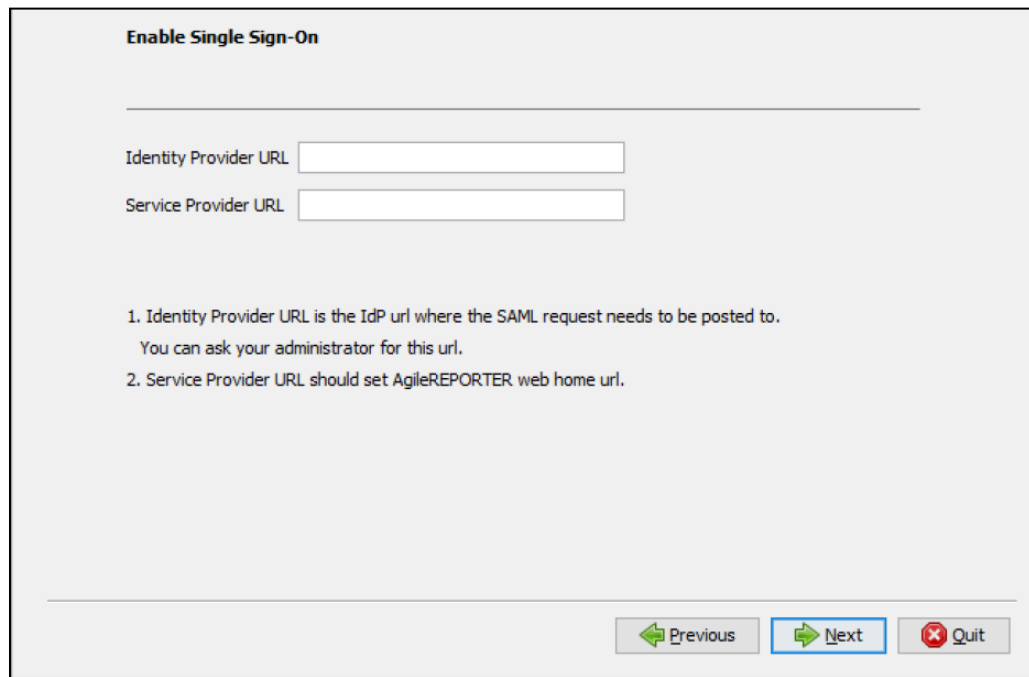
The screenshot shows a 'User Authentication' window. It has a title bar and a main content area. Under the title, there's a section 'AgileREPORTER User Access type' with four radio button options: 'AgileREPORTER' (selected), 'Single Sign On', 'LDAP Only', and 'Mixed - LDAP and AgileREPORTER'. Below this, a text line states 'Users and passwords are stored in AgileREPORTER database.' followed by a 'Session Timeout' section with a label 'Value (in minutes):' and an empty text input field. 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

- **Single Sign-On:** Users are managed in the AgileREPORTER database, but passwords can be optional in AgileREPORTER. An SSO Server is used to provide user authentication.
- **LDAP Only:** Users are managed in the AgileREPORTER Database, but passwords can be optional in AgileREPORTER. An LDAP Server is used to provide user authentication.
- **Session Timeout:** Users' sessions will time out after a period of inactivity. Set the Timeout Value (allowed period of inactivity) in minutes. If no value is specified, AgileREPORTER will default to 15 minutes.

12. If you select **Single Sign-On**, enter values for **Identity Provider URL** and **Service Provider URL**.

Figure 12: Enable Single Sign-On Screen



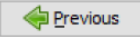

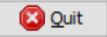
Enable Single Sign-On

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.

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/` (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:

- Time on the Identity Provider Server and the OFS AgileREPORTER Server is synchronized.
- 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.

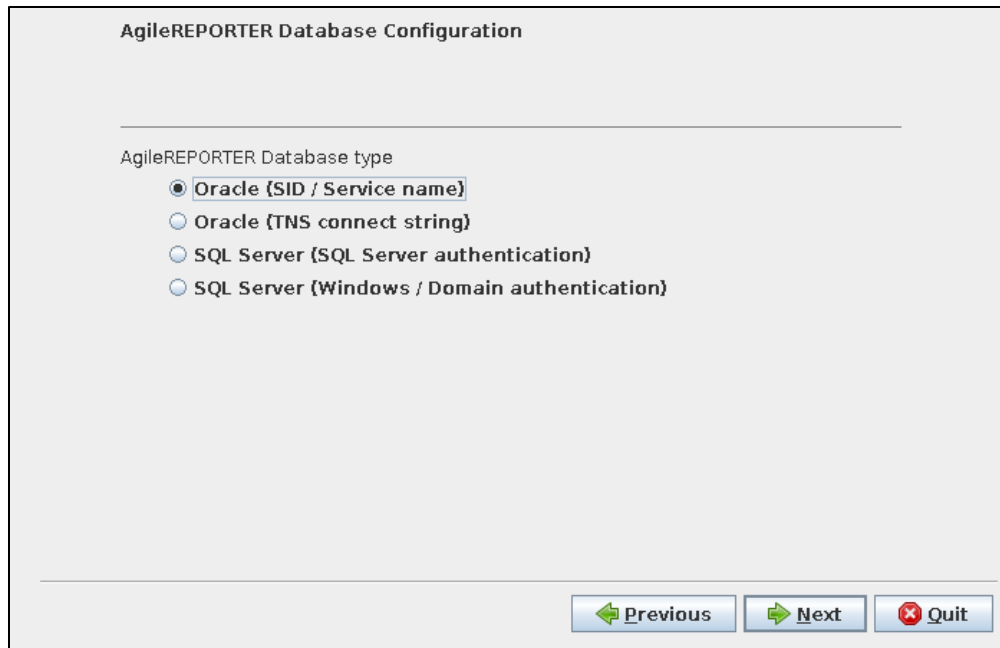
13. Enter the database connection information and credentials for the OFS AgileREPORTER Schemas with DDL (at installation) or DML (at Application Runtime).

NOTE

Credentials must match those defined in the schemas referenced in the [Supported Databases](#) Section.

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

Figure 13: AgileREPORTER Database Configuration Screen



AgileREPORTER Database Configuration

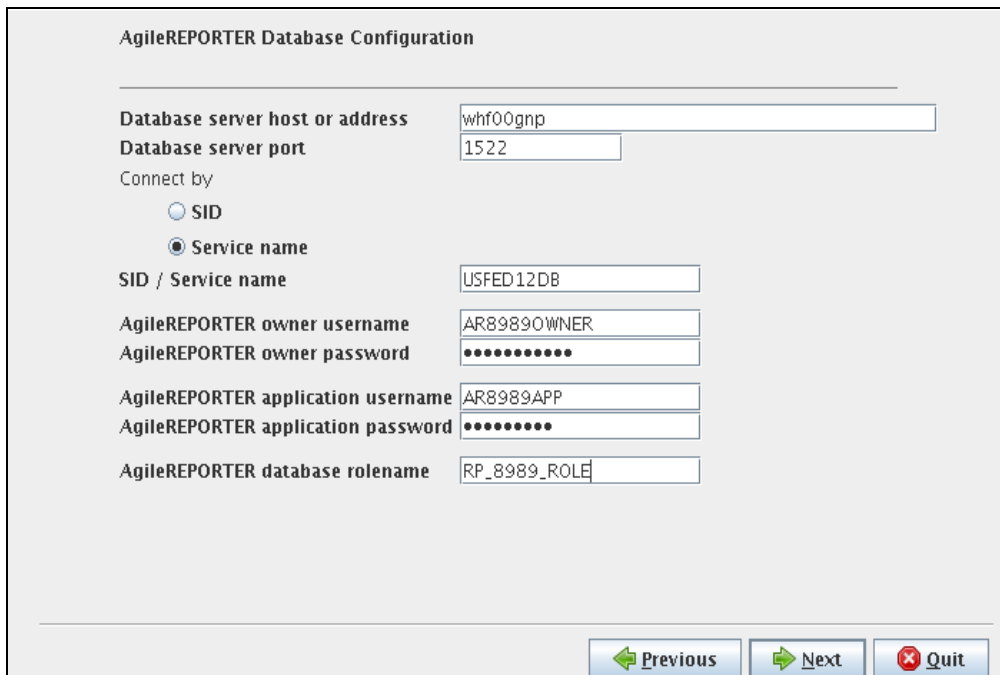
AgileREPORTER Database type

- ☒ Oracle {SID / Service name}
- ☐ Oracle {TNS connect string}
- ☐ SQL Server {SQL Server authentication}
- ☐ SQL Server {Windows / Domain authentication}

Navigation buttons: Previous, Next, Quit

Oracle (SID / Service Name)

Figure 14: AgileREPORTER Database Configuration Oracle (SID / Service name) Screen



AgileREPORTER Database Configuration

Database server host or address: whf00gnp

Database server port: 1522

Connect by

- ☐ SID
- ☒ Service name

SID / Service name: USFED12DB

AgileREPORTER owner username: AR8989OWNER

AgileREPORTER owner password:

AgileREPORTER application username: AR8989APP

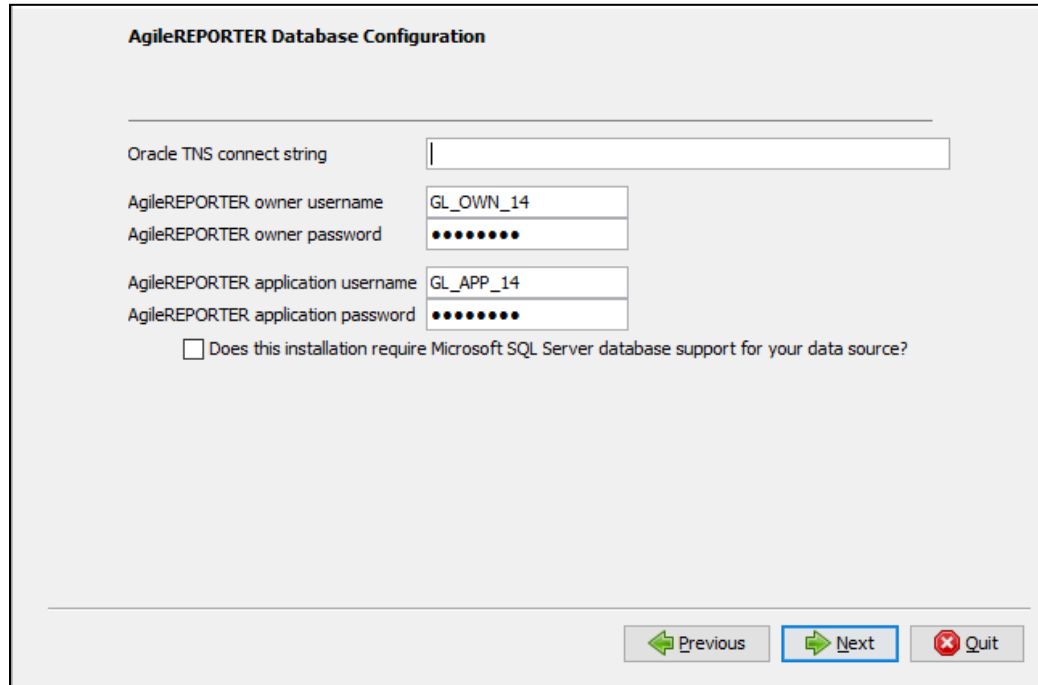
AgileREPORTER application password:

AgileREPORTER database rolename: RP_8989_ROLE

Navigation buttons: Previous, Next, Quit

Oracle (TNS connect string)

Figure 15: AgileREPORTER Database Configuration Oracle (TNS connect string) Screen



The screenshot shows the 'AgileREPORTER Database Configuration' window. It contains the following fields and controls:

- Oracle TNS connect string:** A text input field.
- AgileREPORTER owner username:** A text input field containing 'GL_OWN_14'.
- AgileREPORTER owner password:** A password input field with masked characters (dots).
- AgileREPORTER application username:** A text input field containing 'GL_APP_14'.
- AgileREPORTER application password:** A password input field with masked characters (dots).
- Checkbox:** A checkbox labeled 'Does this installation require Microsoft SQL Server database support for your data source?'.
- Navigation buttons:** 'Previous' (disabled), 'Next' (active/highlighted), and 'Quit' (disabled).

NOTE

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

Figure 16: Create AgileREPORTER Administration User Screen

Create AgileREPORTER administration user

Username

Password:

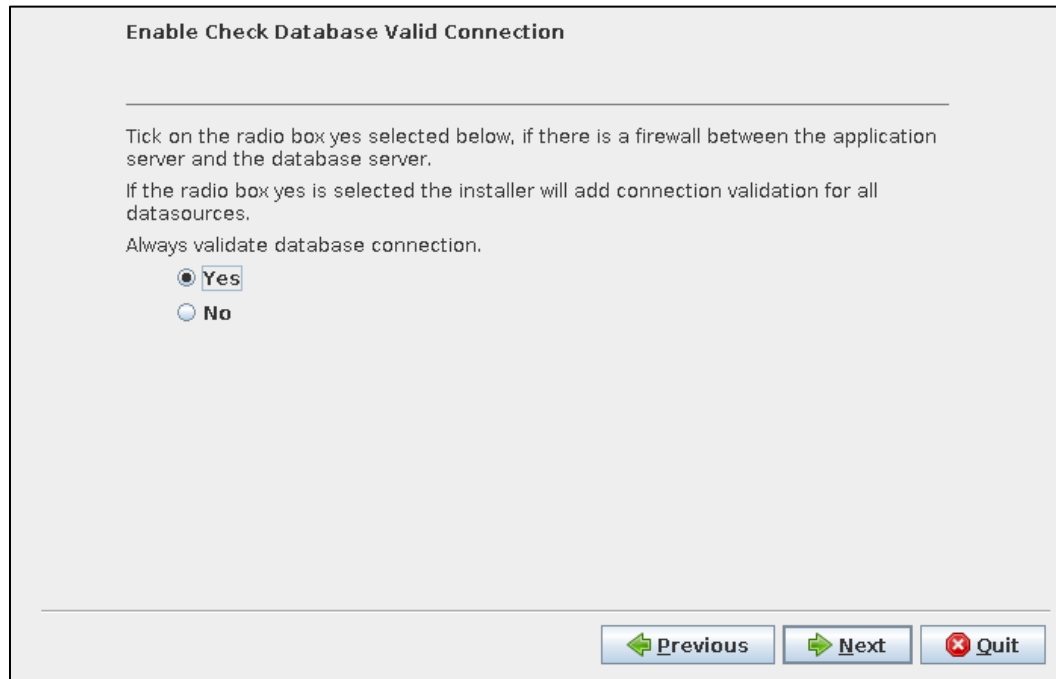
Confirm password:

[Previous](#) [Next](#) [Quit](#)

If the **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 administrative 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.

Figure 17: Enable Check Database Valid Connection Screen



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.

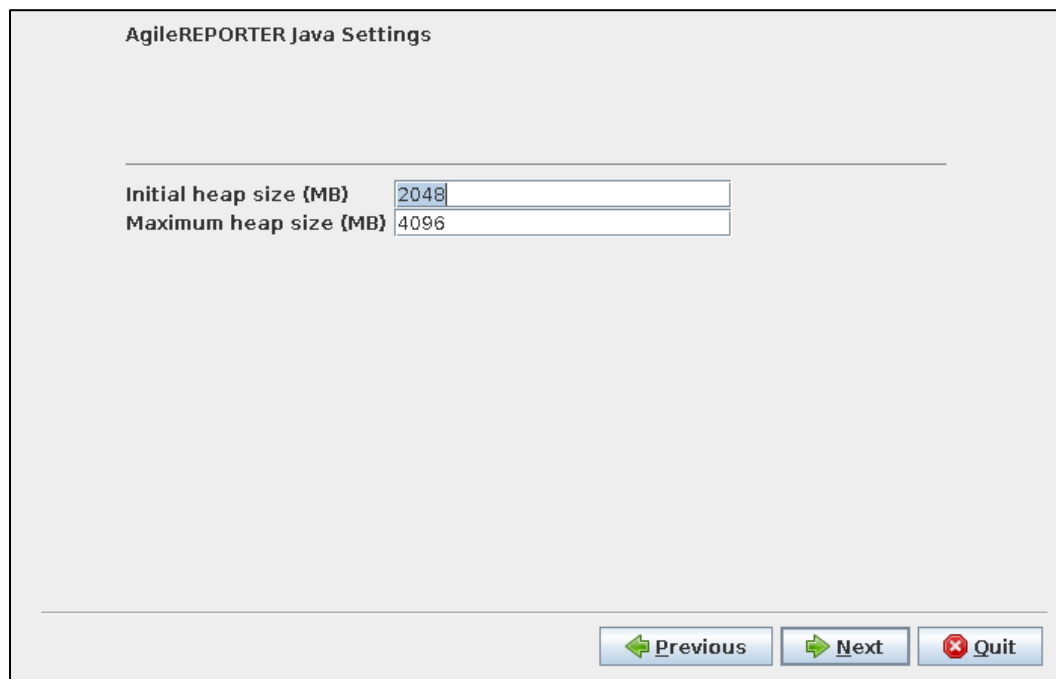
☒ **Yes**

☐ **No**

 **Previous**  **Next**  **Quit**

16. Enter the Java minimum and maximum heap sizes.




Figure 18: AgileREPORTER Java Settings Screen



AgileREPORTER Java Settings

Initial heap size (MB)

Maximum heap size (MB)

 **Previous**  **Next**  **Quit**

17. Select the shortcut settings, if required.

Figure 19: Shortcut Settings Screen

☒ Create shortcuts in the XDG-Menu
☒ Create additional shortcuts on the desktop

Select a Program Group for the Shortcuts:

create shortcut for:

☒ current user
☐ all users

Lombard Risk\AgileREPORTER Default

Previous Next Quit

18. Select **Create UNIX Service** to create a 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.

Figure 20: Unix Settings Screen

Unix Settings

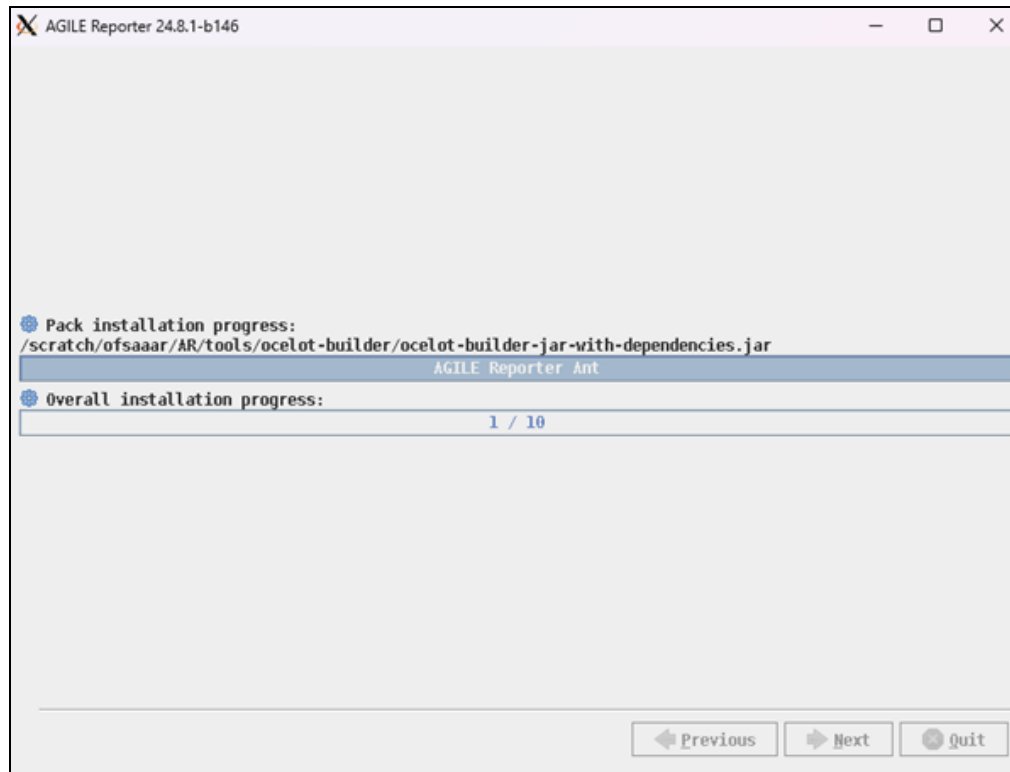
☒ Create Unix service

Unix service suffix name

Unix service starter user account name

19. Wait for unpacking and installation to complete.

Figure 21: Installation progress Screen



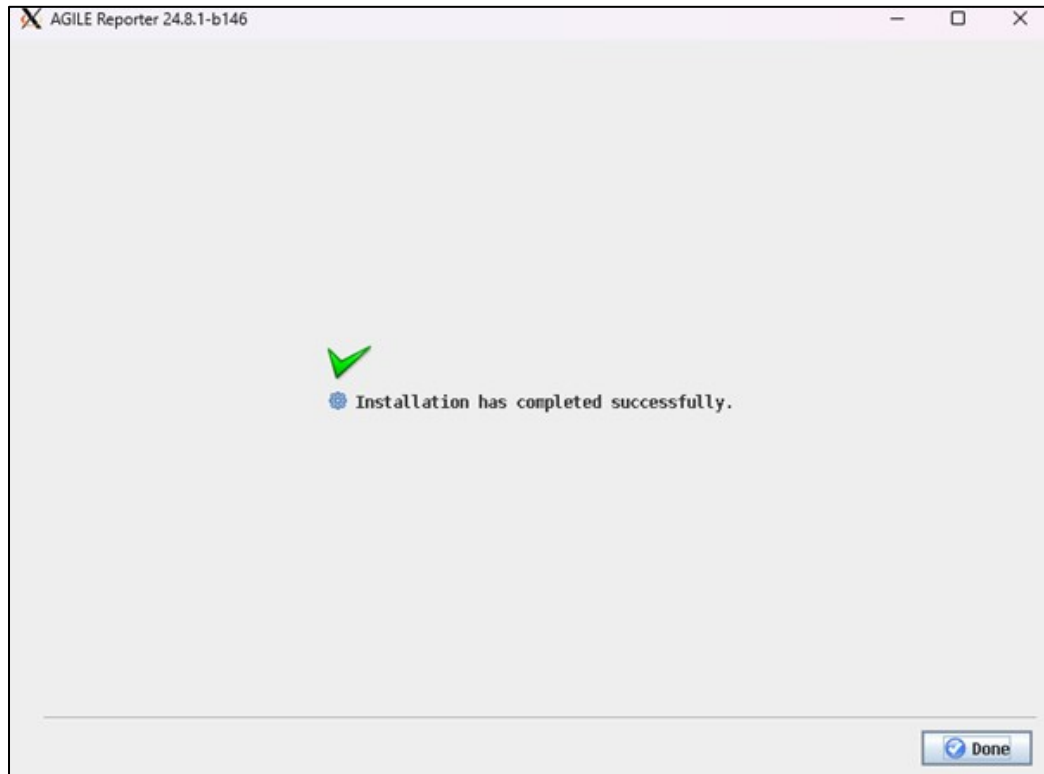
20. Select **Start AgileREPORTER now** (to open immediately) and click **Next**.

Figure 22: Start AgileREPORTER Now Screen



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

Figure 23: Installation success Screen



NOTE

If required, the DDL Schema or 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.

Figure 24: AgileREPORTER Dashboard



4.1.3 Running the Installer in GUI Mode for Upgrade

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

1. Repeat the steps in section [4.1.2 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. You must click **Next** to continue and complete the installation.

NOTE

After upgrading from a previous version of AgileREPORTER, 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.

4.1.4 Running the Installer in SILENT Mode

NOTE

Before proceeding, ensure that all pre-installation requirements listed in [Chapter 3 – Preparing for Installation](#) are met. An additional parameter **Session Timeout** has been introduced in the AgileREPORTER 20.4 release. For more information, see [Table 4: Configuration Properties for Silent.props File](#)

Rename the `Silent.template` to `Silent.props` from the `OFS_AGILE_REPORTER/AgileREPORTER/conf` directory and then fill the `Silent.props` file from the `OFS_AGILE_REPORTER/AgileREPORTER/conf` directory before starting the installation.

The following table describes the installation properties that you must enter in the `Silent.props` Java Properties file. This file uses a standardized format consisting of a key followed by an equal to 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.

Table 3: Installation properties for Silent.props File

| 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\(java.io.Reader\)](http://docs.oracle.com/javase/6/docs/api/java/util/Properties.html#load(java.io.Reader)) or contact VERMEG support.

The configurable properties with a grey background are not shown in the OFS AgileREPORTER Installer user interface. Do not alter these unless instructed to do so by VERMEG Support.

NOTE

AgileREPORTER security is improved constantly. Earlier, the Blowfish Algorithm with a hard-coded secret key was used to encrypt the passwords saved in the `ocelot.properties` file. Now, the Blowfish Algorithm is deemed as weak encryption and therefore, AgileREPORTER uses AES (Advanced Encryption Standard) Algorithm for encryption.

Consequently, the Encoding Tool that encrypts a given password using the AES Algorithm has been updated and is delivered with AgileREPORTER.

If the password is encrypted in the properties file, the `ocelot.secret.key` property must be added to the `Silent.props` file to specify the secret key used to encrypt the password.

For upgrading an existing AR, use the existing `ocelot.properties` file and the installer will automatically generate a secret key for you.

For a new AgileREPORTER, use the ocelot-encoding tool to generate a secret key, then use this secret key to encrypt all passwords in the `Silent.props` file before you can use it to install AgileREPORTER.

To encrypt the password using an existing secret key, see [Appendix A-Encoding Tool Section in AgileREPORTER Installation Guide 22.1.pdf](#).

All passwords mentioned in the `Silent.props` properties file must be encrypted. Execute the following command to encrypt all passwords using the password encryption utility `ocelot-encoding-1.4150.0.jar` under the `/utility` folder:

To generate a secret key:

```
java -jar ocelot-encoding-1.4150.0.jar -gk
```

To encrypt with an existing secret key:

```
java -jar ocelot-encoding-1.4150.0.jar -en  
<PASSWORD> -k <SECRET KEY>
```

To encrypt with a random secret key:

```
java -jar ocelot-encoding-1.4150.0.jar -en  
"password"
```

Table 4: Configuration Properties for Silent.props File

| 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 | The default value is False. NOTE: Enter True if you want to restrict to one user per session. |

| Property Name | Description of Property | Permissible Values | Comments |
|---------------------------|--|--|---|
| main.host.name | Current machine's IP address or hostname | Not Applicable | For example: 10.XXX.XXX.XXX |
| activemq.port | AgileREPORTER jBoss AMQ Port | Not Applicable | For example: 61616. |
| agile.reporter.web.app | AgileREPORTER Web Application | True False | The default value is True. |
| host.port | AgileREPORTER Web Host Port | Not Applicable | For example: 8091. |
| httpsMode | HTTPS/SSL Required or Not | True False | The default value is False. The 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 | The default value is True. |
| data.schedule.export.job | Data Schedule Export Job activation | True False | The default value is True. |
| other.brokers | Other ActiveMQ Broker activation | True False | The 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 | The 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 |
| 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 |

| Property Name | Description of Property | Permissible Values | Comments |
|--|---|--|---|
| ocelot.app.jdbc.password | RP Application Schema Password | Not Applicable | For example: 5dfc52b51bd355539bd9a0b76da9b8e7 |
| check.db.validation.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 |
| 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 | OFSA 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 | OFSA Config Database server port | Database Port | For example: 1521 |
| ocelot.ofsaa.dbType | OFSA database type (SID / Service name, TNS) | Oracle | The default value is Oracle. |
| ocelot.ofsaa.connectType | OFSA connect by SID or Service name | SID Service Oracle TNS | For example: SID Service Oracle TNS |
| ocelot.ofsaa.instance | OFSA SID or Service name to connect to OFSA CONFIG schema | SID / Service Name | For example: ORACLEDB |

| Property Name | Description of Property | Permissible Values | Comments |
|----------------------------------|---|---|--|
| 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 |
| ocelot.secret.key | The secret key used to encrypt the password | Not Applicable | For example: M7zsrc2WcWyhz9a0rbkPQw== (A random secret key can be generated using the ocelot-encoding tool.) |
| activemq.authentication.user | AgileREPORTER admin user | Not Applicable | For example: rpadmin |
| activemq.authentication.password | AgileREPORTER admin password (encrypted) | Not Applicable | For example: 5dfc52b51bd355539bd9a0b76da9b8e7 |
| ocelot.session.timeout | # HTTP session timeout (in minutes) to be defined in web.xml. | Not Applicable | For example: ocelot.session.timeout=25 Default is 15 minutes if left blank. |

To install OFS AgileREPORTER using the installer in SILENT Mode, follow these steps:

1. Navigate to the path where the contents of the OFS AgileREPORTER Installer Kit have been extracted.
2. Navigate to the OFS_AGILE_REPORTER/AgileREPORTER/conf directory.
3. Rename the file Silent.template to Silent.props and update the file as explained in [Section 4.1.4](#)
4. Navigate to the OFS_AGILE_REPORTER/AgileREPORTER/bin directory in the Console.
5. Execute the ./Setup.sh SILENT command.

If the installation fails, check the log file at the <RP_HOME>/log/install.log directory.

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.

4.1.5 Running the Installer in SILENT Mode for Upgrade

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

1. Take a backup of the `ocelot.properties` file that was used for installing the earlier version of AgileREPORTER and keep it for your reference to fill the `Silent.props` file.
2. Repeat the section [4.1.4 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.

4.1.6 Verifying the Log File

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

5 Trial Template Package Installation

As part of the AgileREPORTER Installer, you are allowed to install Trial Template Packages for RBI and US FED.

5.1 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 a trial pack installer, which can be used only for three returns. Contact [My Oracle Support](#) to procure the license for complete US FED Return Templates.

5.2 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 a Trial Pack Installer, which can be used only for three returns. Contact [My Oracle Support](#) to procure the license for complete RBI Return Templates.

5.3 Installing Trial Template Packages

Follow these steps to install Sample Template Packages.

1. Navigate to the `/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.

Table 5: Parameters Configuration

| 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. | The list of values expected is RBI and USFED. For example: USFED |

3. Navigate to the /OFS_AGILE_REPORTER/Template_Packages/ Directory and execute the command:
`chmod 755 *`
4. Navigate to the /OFS_AGILE_REPORTER/Template_Packages/bin Directory.
5. Execute the `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 Directory. Logs can be found in the `[Installed path]/log/install.log` file.

6 Start or Stop AgileREPORTER Services

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

6.1 Start AgileREPORTER Web Server

Follow these steps to start the AgileREPORTER Web Server:

1. Navigate to the path where AgileREPORTER is installed and then go to the `/bin` directory under the installed location.
2. Execute the `nohup ./start.sh > rplog.txt &` command.

6.2 Stop AgileREPORTER Web Server

Follow these steps to stop the AgileREPORTER Web Server:

1. Navigate to the path where AgileREPORTER is installed and then go to the `/bin` directory under the installed location.
2. Execute the `./stop.sh` command.

7 Error Dictionary

This section is intended to help you resolve installation issues, if any. It provides 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.

7.1 Accessing Error Dictionary

Rather than scrolling through the document to find the error code, you can use the PDF Search functionality. In the Find dialog available in 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 on the **Edit** menu click **Find**.
2. The **Find** Dialog Box 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.

Table 6: Error Code – OFSAAI-1003

| | |
|-------------------|--|
| Cause | JAVA_HOME/bin not found in the PATH variable. |
| Resolution | Import <JAVA_HOME>/bin into the PATH variable. Example: PATH=\$JAVE_HOME/bin:\$PATH export PATH |

View the details of the issues, their 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 unable to resolve the issue with the steps provided in the resolution, you can contact [My Oracle Support](#) along with log files and appropriate screenshots.

7.2 Error Code Dictionary

Sample Error Code

Table 7: Sample Error Code

| | |
|-------------------|--|
| 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 |

OFSAA Support

Raise a Service Request (SR) in [My Oracle Support \(MOS\)](#) for queries related to the OFSAA Applications.

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