# BIP Installation Guide Oracle Financial Services Lending and Leasing

Release 14.5.0.0.0

Part No. E95814-01

May 2018



BIP Installation Guide May 2018 Oracle Financial Services Software Limited

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# 1. Preface

This document contains notes and installation steps needed to install and Configure Oracle BI Publisher. Oracle Financial Services Lending and Leasing relies on this software to configure reports and this document is in no way meant to replace Oracle documentation supplied with this Oracle product or available via Oracle technical support. The purpose of this document is only meant to supplement the Oracle documentation and to provide Oracle Financial Services Lending and Leasing specific installation instructions.

For recommendations on security configuration, refer Security Configuration Guide.

BI Publisher installation consists of the following steps.

- Installing BI Publisher
- Configuring BI Publisher
- Creating BI Publisher Datasource
- Importing Reports to BI Publisher Server
- Configure MDB Mail Server

### 1.1 <u>Prerequisites</u>

The following software are required to install Oracle Financial Services Lending and Leasing application and they are available from the following sources:

- Oracle Software Delivery Cloud (http://edelivery.oracle.com/)
- Oracle Technology Network (OTN)
- 1. JDK Version 1.8.0\_144 or above (<u>http://www.oracle.com/technetwork/java/javase/</u> <u>downloads/index.html</u>)
- Oracle WebLogic Server 12c Version 12.2.1.3.0 <u>http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-main-097127.html</u>)
- 3. Oracle BI Publisher Version BI 12.2.1.3.0 http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html

#### Note

```
Please use all 64-bit software's for machine hosted with 64-bit O/S.
```

### 1.2 <u>Audience</u>

This document is intended for system administrators or application developers who are installing Oracle Financial Services Lending and Leasing Application.

### **Conventions Used**

Term	Refers to
Home Directory/	Oracle Financial Services Lending and Leasing Home
\$OFSLL_HOME	Directory



# 2. Installing BI Publisher

### 2.1 Installing BI Publisher

Follow the below steps to install BI publisher:

- 1. Download and unzip all the software related to OBIEE (2 zip files).
  - fmw\_12.2.1.3.0\_bi\_linux64\_Disk1\_1of2.zip
  - fmw\_12.2.1.3.0\_bi\_linux64\_Disk1\_2of2.zip
- 2. Navigate to bin file
- 3. Run ./bi\_platform-12.2.1.3.0\_linux64.bin
- 4. The following window is displayed.

Oracle Business Intelligence 12c - S	itep 1 of 8	
Welcome		
🧼 Welcome		
Auto Updates	Welcome to Oracle Business Intelligence 12c (12.2.1.3.0) Installer.	
v Installation Location	At any time during the installation, you can view the <u>Release Notes</u> for additional infor	mation.
Installation Type	Context sensitive help is available at any time by selecting <b>Help</b> .	
Prerequisite Checks		
Installation Summary		
Installation Progress		
Installation Complete		
	Copyright © 1999, 2017, Oracle and/or its affiliates. All rights reserved.	
Help	< <u>Back</u> <u>N</u> ext > <u>Fini</u>	sh Cancel

5. Click 'Next'. The following window is displayed.



6. Select the option 'Skip Software Updates'.

Oracle Business Intelligence 12c	- Step 2 of 8		- • ×
Auto Updates			
	<ul> <li>Skip <u>A</u>uto Upda</li> <li>Select patches</li> <li>Location:</li> <li>Search <u>My</u> Ora</li> <li><u>U</u>sernam e:</li> <li><u>P</u>assword:</li> <li><u>Search</u></li> </ul>		Ergwse Test Connection
Help		< <u>Back N</u> ext >	nish Cancel

7. Click 'Next'. The following window is displayed.



8. Browse Oracle Middleware Home path (for example /u01/Middleware/ Weblogic12cHome) and click 'Next'.

Oracle Busine	ss Intelligence 12c	- Step 3 of 8					
Installation	Location						
Welcome		<u>O</u> racle Home:					
Auto Update	5	/u01/Middleware/Weblogic12cHome					Browse
Installation	Location	Feature Sets Installed At Selected Ora	acle Home: View				
Installation T	Type						
Prerequisite	Checks						
Installation S	iummary						
V Installation P	Progress						
o Installation C	Complete						
		<ul> <li>The oracle nome youry magnetic cy installation.</li> <li>This page only shows Feature Sets in It does not show Feature Sets installe</li> </ul>	stalled at the selected				· · · · · · · · · · · · · · · · · · ·
<u>H</u> elp		a does not show reactive sets instant	co any where erse.	< <u>B</u> ack	<u>N</u> ext > <u>F</u> in	ish	Cancel
				-			



9. Select the option 'BI Platform Distribution with Samples' and click 'Next'.

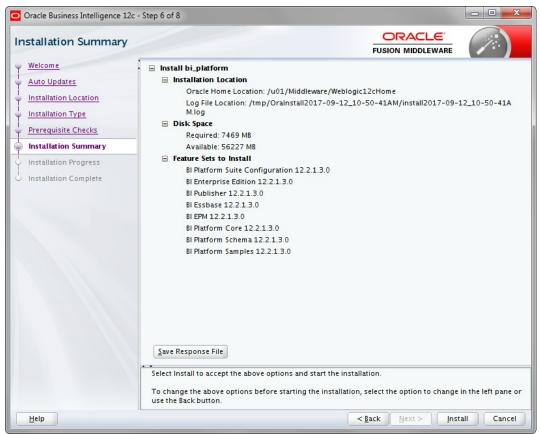
Oracle Business Intelligence 12c -	Step 4 of 8		
Installation Type			
Welcome     Auto Updates     Installation Location     Installation Type     Prerequisite Checks     Installation Summary     Installation Progress     Installation Complete	<ul> <li>BI Platform Distribution</li> <li>BI Platform Distribution with Samples</li> <li>bi.platform 12.2.1.3.0</li> <li>BI Platform Suite Configuration 12.2.1.3.0</li> <li>BI Publisher 12.2.1.3.0</li> <li>BI Essbase 12.2.1.3.0</li> <li>BI Platform Core 12.2.1.3.0</li> <li>BI Platform Schema 12.2.1.3.0</li> <li>BI Platform Samples 12.2.1.3.0</li> </ul>		
Help		< <u>Back</u> <u>N</u> ext > <u>Fini</u>	sh Cancel

10. The following window is displayed. Click 'Next'.

Oracle Business Intelligence 12	c - Step 5 of 8			
Prerequisite Checks	FUSION MIDDLEWARE			
<u>Welcome</u>				
Auto Updates	100%			
	<ul> <li>Checking operating system certification</li> <li>Checking recommended operating system packages</li> <li>Checking kernel parameters</li> <li>Checking Recommended glibc version</li> <li>Checking physical memory</li> <li>Checking Java version used to launch the installer</li> </ul>			
	Stop     Berun     Skip     ✓ View Successful Tasks	View <u>L</u> og		
Checking kernel parameters      Checking Recommended glibc version      Checking physical memory				
Help	⊕	ish Cancel		



11. The following window is displayed. Click 'Install'.



12. The following window is displayed. Click 'Next'.

Oracle Business Intelligence 12c	- Step 7 of 8
Installation Progress	
Y Welcome	
Auto Updates	100%
Unstallation Location	V Prepare
ပုံ Installation Type	Copy
Prerequisite Checks	Generating Libraries
V Installation Summary	Performing String Substitutions
Installation Progress	V Linking
Installation Complete	Setup
	Saving the inventory
	Post install scripts
	View Messages View Successful Tasks View Log
	Applications
	Driving Profitable Growth
Help	< <u>Back</u> <u>Next&gt;</u> <u>Finish</u> Cancel



13. Once the installation is complete click 'Finish' to close.





# 3. Configuring BI Publisher

After installing BI Publisher, the next step is to configure BIP.

#### To configure BIP

- 1. Launch configuration window and browse to \$BI\_HOME/bin (for example, BI\_HOME is / u01/Middleware/Weblogic12cHome/bi).
- 2. Run ./config.sh. The following window is displayed.

Oracle Business Intelligence 12c	Configuration Assistant - Step 1 of 9
Welcome	
<ul> <li>Velcome</li> <li>Perequisite Checks</li> <li>Define New Domain</li> <li>Database Details</li> <li>Port Management</li> <li>Initial Application</li> <li>Summary</li> <li>Configuration Progress</li> <li>Configuration Complete</li> </ul>	<form></form>
Help	< <u>Back</u> Next > Einish Cancel



3. Select the option 'Business Intelligence Publisher' and Click 'Next'.

Oracle Business Intelligence 12 Prerequisite Checks	2c Configuration Assistant - Step 2 of 9  CRACLE  FUSION MIDDLEWARE	
Welcome		
Prerequisite Checks	100%	
Define New Domain	Checking operating system certification	
Database Details	Checking recommended operating system packages	
Port Management	Checking kernel parameters	
Initial Application	Checking Recommended glibc version	
<u>Summary</u>	Checking physical memory	
Configuration Progress	Checking Java version used to launch the installer	
Configuration Complete		
	Stop Rerun Skip View Successful Tasks	View Log
	Checking kernel parameters	
	⊕…	
	B → Checking Java version used to launch the installer	
Help	< <u>Back</u> <u>N</u> ext > <u>F</u> inish	Cancel

#### 4. Click 'Next'. The following window is displayed.

Oracle Business Intelligence 12c C	onfiguration Assistant - Step 3 of 9	x
Define New Domain		
Define New Domain <u>Velcome</u> <u>Prerequisite Checks</u> <u>Define New Domain</u> <u>Database Details</u> <u>Port Management</u> <u>Initial Application</u> <u>Summary</u> Configuration Progress Configuration Complete		
Help	< <u>Back</u> Next > Einish Cance	-



5. Enter the User Name, Password and Domain Name for BI Publisher domain. Click 'Next'. The following window is displayed.

Oracle Business Intelligence 12c C	Configuration Assistant - Step 4 of 9			- 0 <mark>- X</mark>
Database Schema				
Welcome     Prerequisite Checks     Define New Domain     Database Details     Port Management     Initial Application     Summary     Configuration Progress     Configuration Complete	Database schemas are required fo schemas are distinct from any data The simplest option is to create ne schemas you created earlier using gives you aditional options, such a /u01/Middleware/Weblogic12cHo	a sources which y w database schen the Repository C as choosing tables me/oracle_comm OFSLL OFSLL Oracle Database Sys	ou plan to analyse in Bl. nas here. Alternatively yo reation utility (RCU). Usin spaces. RCU is available ir on/bin.	u can use existing ng RCU in advance
Help			< <u>B</u> ack Next >	Einish Cancel

6. Select the option 'Create New Schema' and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.



7. Click 'Next'. The following window is displayed.

	Dracle Business Intelligence 12c	Configuration Assistant - Step 5 of 9			- • ×
Po	ort Range				
	Welcome         Prerequisite Checks         Define New Domain         Database Details         Port Management         Initial Application         Summary         Configuration Progress         Configuration Complete	Choose the port range for B Port Range Port Range Starting Port Port Range End Port	7500		
	Help			K <u>B</u> ack <u>N</u> ext > Eini	sh Cancel

#### 8. Click 'Next'. The following window is displayed.





9. Click 'Next'. The following window is displayed.

0	Oracle Business Intelligence 12c	Configuration Assistant - Step 7 of 9		
Su	ummary			
Ψ	Welcome	· 🖃 Configure		
1	Prerequisite Checks Define New Domain	Configuration Components BIP		
Ϋ́	Database Details	⊟ Domain BI Domain Name: bi		
ψ	Port Management	Domains Directory: /u01/Middleware/Weblogic12cHome	/user_projects/d	omains
ļψ	Initial Application	Admin server (HTTP port 7500, HTTPS 7501, internal 750		
9	Summary	Managed server (HTTP port 7502, HTTPS 7503, internal 7	505)	
J.	Configuration Progress	Database		
5	Configuration Complete	New schemas Database type: ORACLE		
	configuration complete	Connect string: ofsll.in.oracle.com:1521:ORCL		
		New RCU prefix: OFSLL		
		🖃 Port Management		
		🖃 Port range		
		Port range start: 7500		
		Port range end: 7999		
		Application		
		SampleAppLite		
		Service Instance Key: ssi Service Instance Limit: 1		
		Entry points		
		Save Response File: Save Click Save to generate a response file used for silent installation.		<b>v</b>
	Help	Seck Next >	Configure	Cancel



Configuration Progre	ss	
Welcome	Configuration Tools	
ر Prerequisite Checks	Name	Progress
Define New Domain	🖶 🖌 🖌 Bl Configuration	100%
Database Details	Create default domains dir	Success
Port Management		Success
	Create expanded domain	Success
Initial Application	Bl Publisher (BIP)	Success
Summary	Complete domain	Success
Configuration Progress	Store port range	Success
Configuration Complete	Add default service instance	Success
	SampleAppLite	Success
	Store JMS credential	✓ Success
	🖶 🖳 🖌 BI Startup	100%
	🖻 💽 🖌 Bl Epilogue	100%
	Configuration Log Location: /home/oracle/app/or	alnventory/logs/install2017-09-12_07-18-16PM.log
	🕀 🖌 Bl Configuration	
	🗉 🖌 BI Startup	
	🗈 🖌 Bl Epilogue	



11. Click 'Next'. The following window is displayed

Configuration Complet	e ORAC FUSION MIDDL	A	
9 Welcome	Domains Directory: /u01/Middleware/Weblogic12cHome/user_p	rojects (domain	- [
Rerequisite Checks	Admin server (HTTP port 7500, HTTPS 7501, internal 7504)	ojeets/domain	<b>`</b>
Define New Domain	Managed server (HTTP port 7502, HTTPS 7503, internal 7505)		
	Database		
🗘 Database Details	New schemas		
Port Management	Database type: ORACLE		
Initial Application	Connect string: ofsll.in.oracle.com:1521:ORCL		
	New RCU prefix: OFSLL		
Summary	Port Management		
Configuration Progress	Port range		
Configuration Complete	Port range start: 7500		
	. Port range end: 7999		
	Application		
	SampleAppLite		
	Service Instance Key: ssi		
	Service Instance Limit: 1		
	Entry points     Webliesis Consols		
	WebLogic Console		
	http://ofsII.in.oracle.com:7500/console Fusion Middleware Control		
	http://ofsil.in.oracle.com:7500/em		
	BI Publisher		
	http://ofsil.in.oracle.com:7502/xmlpserver		
	Save this page: <u>S</u> ave		
	Click Save to generate a file containing the summary details.		
Help	< Back Next >	Finish	Cancel

- 12. Click 'Save' and save the Response File.
- 13. Click 'Finish'. The application will create a new domain for BI Publisher with the details as highlighted in the above screen.

### 3.1 Verifying Successful BIP Deployment

Successful BIP deployment can be verified by Launching the BIP URL <u>http://hostname:7502/</u> <u>xmlpserver</u>.



## 4. Creating BI Publisher Datasource

To create BI Publisher Datasource, do the following:

- On BI Publisher Domain, create Data Source with JNDI as 'jdbc/ofsllbipdb' and select the Database Driver as 'Oracle's Driver(Thin) for Instance connections; Versions:Any'.
- Target the datasources to 'bi\_server1'
- 1. Access the weblogic console URL using http://hostname:<adminserver\_port>/console.

ORACLE WebLogic Server A	dministration Console 12c			ŏ					
Change Center	A Home Log Out Preferences 🐼 Record Help	Q		Welcome, weblogic Connected to: bi					
View changes and restarts	Home >Summary of Services >Summary of JDBC Data Sources								
Click the Lock & Editbutton to modify, add or delete items in this domain.	Messages All changes have been activated. No restarts are necessary.								
Lock & Edit	Summary of JDBC Data Sources								
Release Configuration	Configuration Pontoring								
Demain Structure A ZBC data source an elect bound to the XBC there that provides database connectivity through a pool of XBC connections. Applications can took up a data source on the XBC there and then borrow a database connectivity through a pool of XBC connections. Applications can took up a data source on the XBC there and then borrow a database connectivity through a pool of XBC connections. Applications can took up a data source on the XBC there and then borrow a database connectivity through a pool of XBC connections. Applications can took up a data source on the XBC there and then borrow a database connectivity through a pool of XBC connections. Applications can took up a data source on the XBC there and then borrow a database connectivity through a pool of XBC connections.									
bi	A JBBC data source is an object town do the JBD the that provides da This page summarizes the JDBC data source objects that have been creat Costomize this table Data Sources (filtered - Hore Columns Exist)		.100 connections. Applications can look up a data source on the JNDT tree and the	iborrow a database connection from a data source.					
Diagnostics	Click the Lock & Editbutton in the Change Center to activate all the but	ttons on this page.							
	New - Delete			Showing 1 to 8 of 8 Previous   Next					
	🔲 Name 🔅	Туре	JNDI Name	Targets					
How do L	biplatform_datasource	Generic	jdbc/80PlatformDatasource	bi_duster					
Create JDBC generic data sources	LocalSvcTblDataSource	Generic	jdbc/LocalSvcTbiDataSource	AdminServer					
Create JUBC generic data sources     Create TREC Gold ink data sources	mds-owsm	Generic	jdbc/inds/owsm	AdminServer, bi_duster					
Create JDBC multi data sources	OFFIL BP	Generic	jdbc/ofslbipdb	bi_server1					
Create UCP data sources	opts-audit-0605	Generic	jdbc/AuditAppendDataSource	AdminServer, bi_duster					
Create Proxy data sources	opss-audit-viewOS	Generic	jdbc/Audit/ien/DataSource	AdminServer, bi_duster					
	opss-data-source	Generic	jdbc/OpssDataSource	AdminServer, bi_duster					
System Status 🛛	WLSSchemaDataSource	Generic	jdbc/WLSSchemaDataSource	bi_duster					
Health of Running Servers as of 2:51 PM	New - Delete			Showing 1 to 8 of 8 Previous   Next					
Failed (0)           Critical (0)           Overloaded (0)           Warning (0)           OK (2)									

2. Launch <u>http://hostname:port/xmlpserver</u>. The following window is displayed.

Sign In Rease enter username and password Username
Password
Accessibility Mode 📷
Contract Contract States)

3. Login using the same credentials used for 'WebLogic administration' console login. The following window is displayed.

RACLE' BI Pub	lisher Enterprise	Search All			0,	Administration	Help 🔻	Sign Out
ne			Home	Catalog	New +	Open 🔻	Signed In As	weblogi
create	Recent							
Report	Reports							
Report Job	Others Favorites Manage							
	Favorites Manage							
Data Model								
More w								
owse/Manage								
Catalog Folders								
Report Job History								

4. Click 'Administration' in the header section. The following window is displayed.

DRACLE' BI Publ	isher Enterprise	Search All	Search All v Q. <u>Administration</u>					
ome		Hom	e Catalog	New v Open v	r Signed In As	weblogic		
Create	Recent							
Report	Reports							
Report Job	Others							
Report Job	Favorites Manage							
Data Model								
More w								
Browse/Manage								
Catalog Folders Report Jobs								
Report Job History								

5. Click 'JNDI Connection'.

		Search	Administration	Help 🔻	Sign Out 🚥
Administration	Home	Catalog New	• Open •	Signed In As	weblogic v
Data Sources JUBIC Connection JUDIC Conjection FIDIC Conjection FUDIC Connection OL-P Connection Web Saviora Connection HTTP Connection Content Saver	System Maintenance Server Configuration Senderiz Configuration Senderiz Obsproats Nanape Cash Manape Job Diagnostics Log				
Security Center Security Configuration Roles and Permissions Digital Signature	Runtime Configuration Properties Font Mappings Currency Formats				
Delivery Delivery Configuration Proter Fax Email WebCW HTTP CTP Contest Server CUPS Server CUPS Server Document Durud Services	Integration Drade BI Presentation Services				



6. The following window is displayed.

	se					Search All		v	C	Administration	Help v	Sign Out	
Administration							Home	Catalog	New +	Open 👻	Signed In As	weblogic	Ŧ
Administration > JNDI > Add Data Source													0
Confirmation Connection established successfully.													
Add Data Source													_
											Apr	oly Can	cel .
General											4	Apply	
											_		
	* Data Source Name	FLLReportsPool											
	* JNDI Name	idbc/ofsibiodb											
	Pre Process Function												
	Post Process Function												
		Use Proxy Authenticatio	n										
		Test Connection											
Security													
	Allow Guest Access	1971											
		Available Roles		Allowed Roles									
		BI Consumer				00							
		BI Content Author BI Service Administrator	Move			0							
			Move Al			9							
			٢			~							
			Remove										
			- Remove A		~								

- 7. Add the following details:
  - Specify Data Source Name as 'FLLReportsPool' and JNDI Name as 'jdbc/ofsllbipdb'.
- Under 'Security' section, select 'BI Author Role' and 'BI Consumer Role' from Available Roles and assign them as Allowed Roles.

#### Note

If "BI Author" and "BI Consumer" roles are not displayed in the 'Available Roles' section, you need to create the roles as explained in following 'Creating Roles' section.

8. Click 'Apply'.

### 4.1 <u>Creating Roles</u>

The following section details the steps to be followed to create "BI Author" and "BI Consumer" roles which are used to define security roles while creating Data Source on BI Publisher Domain.

#### To create WebLogic Application Role

- 1. Login to Enterprise Manager using the URL http://hostname:port/em.
- Select Weblogic Domain > Security > Application Roles as indicated in the following screen.

	🚡 WebLogic Domain 🔻	_								Sep 29, 2017 5:33:38 A	MEDI T
1) Infc	Home										(
Cert	Monitoring	▶ you own the	edit session	lock. To obta	in the lock, click	"Lock and	Edit" in the Change Center m	enu.			
Serve Diagnostics Control Logs		n Server	Name	AdminServer							
	Environment	•	Host	ofsII, in	oracle.com						
Clust	Deployments JDBC Data Sources	L	isten Port	9600							
	Messaging	Create	X Delete	Control 👻	Ey						
	Cross Component Wiring Web Services	•		Status	Cluster	Mach	State	Health	Eis Po	CPU Usage (%)	He Usa (N
							Running	OK	96(	0.00	755
	Other Services	r(admin)		1			Running	OIL	900	0.00	155.
Depic	Administration	r(admin)		Ť	bi_cluster	m	Running	ок	96(	0.00	336
Doma		<pre>r(admin)  r(admin) </pre>		-	bi_cluster	m					



3. In the Application Stripe field, select 'obi' from the drop-down list. The option 'BIServiceAdministrator' is added by default. Click 'Create'.

Application ro application. To manage Policy St A Search	e users and groups in tore Provider	the WebLo	gic Domain, use th	e <u>Oracle WebLogic</u>	The application. These roles are seeded by applications in single global policy store when the applications are registered. These are also application roles that are created in the context of end users Series Security Provider.
		ion Stripe		-	
	R	ole Name	Starts With		•
View v	Create	Create Li	ke 🖋 Edit	🗙 Delete	G.
1	hờ				
Role Na	ame		Display Name		Description
BIServic	eAdministrator		BI Service Adminis	strator	This role confers privileges required to administer a service instance.
.⊿ Membe	ership for BISer	viceAdm	ninistrator		
Principal	Disp	olay Name	Туре	• I	Description
weblogic	webl	logic	User		This user is the default administrator.

- 4. Specify the following details:
  - Role Name
  - Display Name
  - Description

Create Application I Role (or Enterprise Role) is the General	tole group of users designed at the enterprise level and typically used to assign a privilege or permission. A tole can also contain other roles as members.	ок	Cancel
Application Stripe	obi		
* Role Name	BIConsumer		
Display Name	BIConsumer		
Description	The base-base look that greater the user access to look infing analyse, and look allow the most set of the se		
Members			
An application role may need to	be mapped to users or groups defined in enterprise LDAP server, or the role can be mapped to other application roles.		
View 👻 🕂 🕅 🗙 🕹	leiete 🙀 Detach		
Name	Display Name Type		
No groups or application roles	added.		

5. Click 'Add' to add the application role to the members family. The same can later be mapped to required Users or Groups defined in Enterprise LDAP server, or the role can be mapped to other application roles.

Create Application Role (or Enterprise Role) is General		d at the enterprise level and typically	used to assign a privilege or permissio	on. A role can also contain other roles as members.	OK Cancel
Add Principal					
Specify criteria to search and Search	select the application roles	that you want to grant permissions to	u		
		Туре	User •		
		Principal Name	Starts With V		
		Display Name	Starts With V	•	
Searched Principals				,	
View w 🔀 Detach					
Principal	Display Name	Description			
LCMUser		This is the default service acc	count for WebLogic Server Lifecycle Ma	anager configuration updates.	
OracleSystemUser		Oracle application software s	rystem user.		
weblogic		This user is the default admin	histrator.		
Advanced Option					
Check to enter principa	I name here instead of searc	thing from above. This option can be	used for advanced scenarios related to	.o custom authenticators.	
					OK Cancel
					.vî



6. Add the Weblogic User by selecting "weblogic" in the 'Searched Principals' section and click 'OK'. The Weblogic User is added to the application role.



7. Click 'OK'. The new role is added to the list of application roles.

and and an and a set of the set			pecific to the application. These roles are seeded by applications in single global policy store when the applications are registered. These are also application roles that are created in the context of end users accessing
pplication.			
To manage users and	groups in the WebL	ogic Domain, use the Oracle V	ebLogic Server Security Provider
Policy Store Provide	ər		
Search			
elect an application and	d enter a search keyw	vord for the role name to search	n for roles defined by thi Application. Use the application stripe to search if the application uses a stripe that is different from the application name.
	Application Stripe	obi	
	Role Name	Starts With	•
View 👻 📲 Create	e 🐮 Create L	ike 💉 Edit 🗙 Dele	te 📴 😨 Deta
1			
Role Name		Display Name	Description
BIServiceAdministra	itor	BI Service Administrator	This role confers privileges required to administer a service instance.
BIConsumer		BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing Bi Publisher reports, but not create any new ones.
Membership fo	or BIServiceAdr	ninistrator	
Principal	Display Nam	е Туре	Description
weblogic	weblogic	User	This user is the default administrator.

#### **To Create WebLogic Application Policies**

- 1. Login to Enterprise Manager using the URL http://hostname:port/em.
- 2. Select Weblogic Domain > Security > Application Policies as indicated in the following screen:

t= [	WebLogic Domain 👻			Apr 22, 2016 1:12:45 PM 157 🔨
1 Inf	Home			9
An	Monitoring	- F		
omain	Diagnostics	Þ		
pplie	Control	+		
pplicatio	Logs	ions that are	specific to the application	n. These roles are seeded by applications in single global policy store when the applications are registered. These are also application roles that are created in the context of end users accessing the
To ma	Environment	▶ e the <u>Oracle \</u>	WebLogic Server Securit	i Provider.
Polic	Deployments	-		
d Sear	JDBC Data Sources			
elect ar	Messaging	hame to sear	ch for roles defined by th	s application. Use the application stripe to search if the application uses a stripe that is different from the application name.
	Cross Component Wiring		•	
	Web Services			
	Other Services		, r	
View a		* L 🗙 Del	lete	🕞 📓 Detach
1	Administration	•		
Rol	Refresh WebLogic Domain	0	Descrin	ion
BIS	Security	Security	Realms	fers privileges required to administer a service instance.
BIC	System MBean Browser	Users a	ind Groups	el role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.
1	9 WebLogic Server Administration Console	Credent	tials	
	Target Sitemap	Security	Provider Configuration	
.⊿ Me	Target Information	Applicat	ion Policies	
Principal	Display Name			
weblogic	weblogic	L Applicat	ion Roles	fault administrator.
		Keyston	e	
		0	Policies	
		System	Policies	



3. In the Application Stripe field, select 'obi' from the drop-down list. Click 'Create'.

Application Delision						
Application Policies	ation policies that on application relian	s upon for controlling access to its resources.				
	the WebLogic Domain, use the Oracle					
Policy Store Provider						
▲ Search						
Select an application and enter the	search keyword for principals or perm	hissions to query application security grants. Use the applica	tion stripe to search if the application uses a stripe	that is different from the application i	name.	
Applicat	tion Stripe obi	•				
Prin	cipal Type Application Role -					
		1.277				
Princ	ipal Name Starts With					
View v 📔 Create	🖞 Create Like 🖋 Edit 🗙 D	ielete				🖙 🗟 Detach
4						
Principal	Display Name	Description				
BIServiceAdministrator	BI Service Administrator					
Policies for BIService.	Administrator					
Permissions						
Resource Name			Resource Type	Permission Actions	Permission Class	Permission S
oracle.bi.publisher.administerSen			oracle.bl.publisher.permi			bip.administrat

4. In 'Create Application Grant' screen, under the Grantee section, click 'Add'.

Create     Second Particulation Creation Particulation Part	OK Cano
Application Stripe of Grante Select the grantees (uses group or application role) you want to add to the polary Wer $\vee$ $\rightarrow$	
Granted       Set Ctr 0 grant black proport asplication role by our watch add to the policy.       Set Ctr 0 grant black proport added.         Name       Diploy Name       Type       Description         No users or groops added.       Set Ctr 0 permissions and resources used in this application. Enter search for right permissions.       Set Ctr 0 permissions.         Set Ctr 0 permissions and resources used in this application. Enter search for right permissions.       Set Ctr 0 permission.       Set Ctr 0 permission.         Set Ctr 0 permissions and resources used in this application. Enter search for right permission.       Set Ctr 0 permission.       Set Ctr 0 permission.	
Select he grantese later (prior or exploration role) you want to add to the policy.       Were V     Deploy Hame     Type       Name     Display Hame     Type    Select from permissions and resources used in this application. Enter search for right permissions Select from permissions and resources used in this application. Enter search for right permissions Select from permissions and resources used in this application. Enter search for right permissions Select from permissions and resources used in this application. Enter search for right permissions Select from permissions and resources used in this application. Enter search for right permissions Select from permissions and resources used in this application. Enter search for right permissions Select from permissions and resources used in this application. Select for right permissions Select from permissions and resources used in this application. Select for right permissions Select from permissions and resources used in the application. Select for right permissions Select from permissions Select from permissions and resources used in this application. Select for right permissions Select from p	
View +     +     Add     Display Name     Type       Description       No users or groups added.	
Name         Display Name         Type         Description           No uses of groups added.	
No users or groups added.	
Permissions Select from permissions and resources used in this application. Enter search of right permissions. Vew v + Ad / Edit. >> Detech Description class Re Permi	
Select hom permissions and resources used in this application. Enter search origin permissions.	
View v 4 Add / Edit. X Delete. 2 Detach	
Selection permissions and resources used in this application. Enter search orients to search for right permissions.	
View + Add / Edit. X Delete. 20 Delete.h	
Parallelia Class	
1) Adda	on Permission Se
No permissions added.	

5. Select the newly created application role from the list and click 'OK'. The new role is added to the list.

Create Application Grant For managing an application policy, select a particular granted	e and attach a permission to it.				ОКС	Cancel
Application Stripe ob Grante Beect the grantes (user, group or application role) you wan Werr w + Add X Delrica. If Delrich Name Display Name No users or groups added Permissions Beect drom permissions and resources used in this application	∡ Search	lect the application roles that y Type Applicat Principal Name Starts V Display Name Starts V	ion Rate 🖉			
View + + Add / Edit X Delete						
Permission Class	Principal	Display Name	Description	Re Permission Tyj Actions	Permission	n Set
No permissions added.	anonymous-role authenticated-role BIConsumer	Anonymous Role Authenticated Role BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them			
	BIServiceAdministrator	BI Service Administrator	to run or schedule existing BI Publisher reports, but not create any new ones.			
			OK Cancel			



6. In the 'Permissions' section, click 'Add'.

Create Application Grant For managing an application policy, sele		ch a permission to it.				ок	Cancel
Application Stripe obi							
Grantee							
Select the grantees (user, group or app	lication role) you want to add to I	the policy.					
View 👻 🕂 Add 🗙 Delete	Detach						
Name	Display Name	Туре	Description				
BIConsumer	BIConsumer	Application Role	The base-level role that grants the user access to existing analyses, d	ashboards and agents, allows them to run or schedule e	xisting BI Publisher reports, but not create a	any new ones.	
Permissions Select from permissions and resource View v + Add / Edit	s used in this application. Enter X Delete 🔐 Detach	search criteria to search for righ	I permissions.				
Permission Class				Resource Name	Re Permission Tyj Actions	Permissio	on Set
No permissions added.							

7. In the search criteria, select 'Resource Type' and select the resource type from the dropdown list. Select the required resource from the search results and click 'Continue'.

	e Application Grant aging an application policy, select	a particular grantee and attach a	permission to	t					OK Cancel
Applica	tion Stripe obi			Add Permission		×			
View Na	re grantees (user, group or applic ▼ + Add ≥ Delete		policy. Type Applic	Select from permissions and resources use A Search Permissions Resource Types Resource Type oracle bit pu Resource Name Starts With	blisher.permission	o search for right permissions.	m to run or schedule existing BI Publisher	reports, but not create a	iny new ones.
Permiss				Search Results					
	om permissions and resources i		irch criteria to s		Display Name	Description			
View w	🔸 🕂 Add 🧳 Edit 📏	Delete 🛒 Detach		oracle.bi.publisher.accessExcelRepo	BIP Access Excel Report Analyzer				
Per	mission Class			oracle.bi.publisher.accessOnlineRep oracle.bi.publisher.accessReportOut	BIP Access Online Report Analyzer BIP Access Report Output			Re Permission Tyj Actions	Permission Set
No perm	nissions added.			oracle.bi.publisher.administerServer	BIP Administer Server				
				oracle.bi.publisher.developDataModel	BIP Develop Data Model				
				oracle.bl.publisher.developReport	BIP Develop Report				
				oracle.bi.publisher.runReportOnline	BIP Run Report Online				
				oracle.bi.publisher.scheduleReport	BIP Schedule Report				
				IP Continue to go to next step if you	want to enter policy details.				
						Continue Cancel			

8. Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click 'Select'.

Create Application Grant	ct a particular grantee and attach	a permission to it.				OK Cancel
Application Stripe obi						
Grantee						
Select the grantees (user, group or appl	ication role) you want to add to th	ne policy.				
View - + Add 🔀 Delete	Detach					
Name	Display Name	Туре	Descrip	Add Permission X		
BIConsumer	BiConsumer	Application Role	The bas		rds and agents, allows them to run or schedule	e existing BI Publisher reports, but not create any new ones.
Permissions Select from permissions and resources View + + Ad / Edit Permission Class No permissions added		search criteria to search for rigt	t permission	Permission Class oracle.security.jps.ResourcePermission control by publisher permission Permission Actions (7) _ all	Resource Name	Re Permission Permission Set Typ Actions
				Back Select Cancel		

9. The selected permissions are defined to the application role. Similarly you can define the required permissions for other application roles.

	Application Grant	ct a particular grantee and attact	n a permission to it.				OK Cancel
Applica	tion Stripe obi						
Grantee							
Select t	ie grantees (user, group or appli	ication role) you want to add to t	ne policy.				
View	≠ + Add × Delete	🗑 Detach					
Na	me	Display Name	Туре	Description			
BIC	onsumer	BIConsumer	Application Role	The base-level role that grants the user access to existing analys	es, dashboards and agents, allows them to run or schedule existing BI Pub	lisher reports, but not create :	any new ones.
Select fr	om permissions and resources		search criteria to search for right	permissions.			
Per	mission Class				Resource Name	Re Permission Tyj Actions	Permission Set
ora	de.security.jps.ResourcePermis	sion			oracle.bi.publisher.accessOnlineReportAnalyzer	ora _all_	
orai	de.security.jps.ResourcePermis	sion			oracle.bi.publisher.runReportOnline	ora _all_	
orai	le.security.jps.ResourcePermis	sion			oracle.bl.publisher.accessExcelReportAnalyzer	ora _all_	



#### 10. Once done, click 'OK'.

Application Policies						
Application policies are the authoriz To manage users and groups in	ation policies that an application relies the WebLogic Domain, use the Oracle !	upon for controlling access to its resources. WebLogic Server Security Provider.				
Policy Store Provider						
⊿ Search						
Select an application and enter the	search keyword for principals or permi	issions to query application security grants. Use the appli-	cation stripe to search if the application uses a stripe	that is different from the application	name.	
Applicati	ion Stripe obi	-				
Princ	cipal Type Application Role 💌					
Drinci	pal Name Starts With 🔹	•				
View v 📲 Create	Create Like 💉 Edit 💥 De	elete				🖙 🔐 Detach
1						
Principal	Display Name	Description				
BIConsumer	BIConsumer					
BIServiceAdministrator	BI Service Administrator					
Policies for BIConsum	er					
Permissions						
Resource Name			Resource Type	Permission Actions	Permission Class	Permission Ser
oracle.bi.publisher.runReportOnlin	e		oracle.bi.publisher.permi	_all_	oracle.security.jps.ResourcePermission	
oracle.bi.publisher.accessOnlineR	eportAnalyzer		oracle.bi.publisher.permi	_all_	oracle.securityjps.ResourcePermission	
	portAnalyzer		oracle.bi.publisher.permi		oracle.security.jps.ResourcePermission	



## 5. Importing Reports to BI Publisher Server

To import reports to BI Publisher Server, do the following:

- Copy and extract the OFSLLReports.zip file to local area. Assume you have extracted to /home/oracle/app/OFSLLReports, then the zip file "oracle.xdrz" is extracted to /home/ oracle/app/OFSLLReports
- 2. Launch the Oracle Business Intelligence Publisher Application using http:// hostname:port/xmlpserver
- 3. Login with valid credentials.

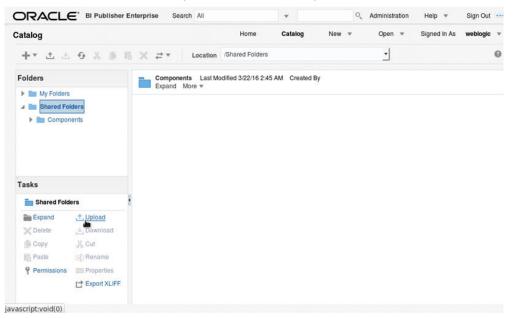
ORACLE <sup>®</sup> BI Publisher Enterprise	
ORACLE <sup>®</sup> BI Publisher Enterprise	Sign In Pease enter username and password Username Password Accessibility Mode
	Sign In English (United States)

4. Following window is displayed. Click on 'Catalog Folders' on the left pane.

	sher Enterprise Search All		Ŧ	۹.		Help 🔻	Sign Out	
Home		Home	Catalog	New *	Open 🔻	Signed In As	weblogic	Y
Create	Recent							
Report	Reports							
	Others							
Report Job	Favorites Manage							
Data Model								
More 🐙								
Browse/Manage								
Catalog Folders								
Report Jobs Report Job History								
Report Job History								



5. Click on 'Shared Folders' option and then click 'Upload'.

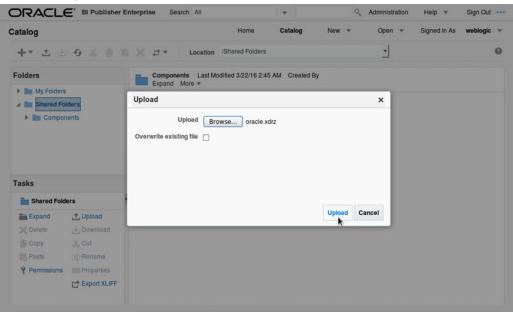


 The following window is displayed. Browse to the location where the oracle.xdrz file is saved. Click the 'Overwrite Existing File' check box if you are overwriting an existing directory.

ORACLE' BI PU	isher Enterprise Search All			c	C Administration	Help 👻	Sign Out	-
Catalog		Home	Catalog	New 💌	Open 🔻	Signed in As	weblogic	
+* ± ± • %	li li X ≓ × Location A	Shared Folders			<u> </u>			0
Folders	Components Last Modi	fled 3/22/16 2:45	AM Created B	y				
My Folders	Upload				×			
Ecomponents	Upload Brow	No file se						
E Shared Folders								
Expand Lupios Detete Down Copy Lupio Partie In Prope Permissions III Prope	s			Upload	Cancel			



7. Click on 'Upload'.



8. The following window is displayed.

	Enterprise Search All	•	्, Admin	istration	Help 🔻	Sign Out	-
Catalog	Home	Catalog	New <b>*</b> Op	en 🔻	Signed in As	weblogic	×
+* ± ± 9 % @ 1	Location /Shared Folders			l .			0
Folders	Components Last Modified 3/22/16 2:45 Expand More =	5 AM Created By					
My Folders	Upload		×				
Components     Tasks	Upload Browse No file s Overwrite existing file  Uploading	elected.					
Shared Folders	1						
Expand Upload  Delete Copy Pasto Permissions Permissions Export XLIFF			Uppad Cancel				
Waiting for 10.184.86.242							



9. Once the upload is completed, click any folder to see the list of reports under the directory. The following window is displayed.

atalog	Home Catalog New V Open V Signed In As web	ogic 1
+* ± ± 0 % # %	Cocation /Shared Folders/oracle/fil/xmlp/reports	6
Folders  My Folders	corgen_em_100_01 Last Modified 3/22/16 2:49 AM Created By weblogic corgen_em_100_01 Open Schedule Jobs Job History Edit More *	-
Shared Folders  Components   onumber of the folders   onumber of the folders	objrpt_em_100_01 Last Modified 3/22/16 2:49 AM Created By weblogic Batch Jobs Report Open Schedule Jobs Job History Edit More *	
Im fil     Im xmip     For correspondence	ocobnk_em_100_01 Last Modified 3/22/16 2:49 AM Created By weblogic ocobnk_em_100_01 Open Schedule Jobs Job History Edit More =	
Tasks	ococol_em_100_01 Last Modified 3/22/16 2:49 AM Created By weblogic ococol_em_100_01 Open Schedule Jobs Job History Edit More ▼	
Expand , Upload	ococoLem_100_02 Last Modified 3/22/16 2:49 AM Created By weblogic ococoLem_100_02 Open Schedule Jobs Job History Edit More *	
E Copy & Cut	ococol_em_100_03 Last Modified 3/22/16 2:49 AM Created By weblogic ococol_em_100_03 Open Schedule Jobs Job History Edit More *	
Permissions Export XLIFF	ococol_em_100_04 Last Modified 3/22/16 2/49 AM Created By weblogic ococol_em_100_04 Coen Schedule Jobs Job History Edit More ▼	



# 6. Configure MDB Mail Server

Refer to the following instructions to configure the MDB email server.

1. Launch the Oracle Business Intelligence (BI) Publisher application (http://hostname:port/ xmlpserver). The following window is displayed.

Sign In Please enter username and password Username	
Password	
Accessibility Mode	
English (United States)	

2. Login using the valid credentials. The following window is displayed.

	sher Enterprise Search All		•	٩,	Administration	Help 💌	Sign Out	
ome		Home	Catalog	New 🔻	Open 💌	Signed In As	weblogic	Ŧ
Create	Recent							
Report	Reports							
	Others							
Report Job	Favorites Manage							
Data Model								
More 💌								
Browse/Manage								
Catalog Folders								
Report Jobs Report Job History								



3. Click 'Administration'. The following window is displayed.

Iministration	Home Catalog New T Open Signed in As weblogic	
Data Sources	System Maintenance	-
JDBC Connection JNDI Connection File LDAP Connection OLAP Connection Web Service Connection HTTP Connection	Server Configuration Scheduler Configuration Scheduler Diagnostics Report Viewer Configuration Manage Cache	
Security Center	Runtime Configuration	
Security Configuration Roles and Permissions Digital Signature	Properties Font Mappings Currency Formats	=
Delivery	Integration	
Delivery Configuration Printer Fax Email WebURAV HTTP FTP Content Server CUPS Server	Oracle BI Presentation Services	

4. Click 'Email'. The following window is displayed.

ORACLE <sup>®</sup> <sup>B</sup>	l Publisher Ente	erprise Sea	arch All			•			Q,	Administration	Help 🔻	Sign Out	-
Administration					Home	Ca	alog	New	v	Open 🔻	Signed In A	s weblogic	•
dministration > Email Delivery Delivery Configuration	Printer Fax	Email Web	DAV HT	TP FTP	Content Se	erver	CUPS Se	rver					6
Server Name Add Server	Host				Port				De	lete			
Add Serve	er												

5. Click 'Add Server'. The following window is displayed.

	er Enterprise Search	All	•		<u>о</u> , А	dministration	Help	Ŧ	Sign Out	
Administration		Home	Catalog	New	Ŧ	Open 🔻	Signed	In As	weblogic	•
Administration > Email > Add Server										0
Confirmation Connection established successfull	y.									
Add Server										
						Test Conn	ection	Apply	Can	icel
General									28452	
* Server Name	ofsll.in.oracle.com		* Host	ofsll.in.oracl	le.com					
Port	25	Secure 0	Connection	None	-					
Security										
Username			Password							

6. Specify the Server details (server name, host, and port number) and click 'Test Connection'. On completion, a confirmation message is displayed as indicated.



7. Click 'Apply'. The following window is displayed.

	ner Enterprise Search All	•	<ul> <li>Adminis</li> </ul>	tration Help 🔻 Sign Out 🚥
Administration		Home Catalog	New 🔻 Ope	n 🔻 Signed In As weblogic 🔻
Administration > Email > Add Server				0
Add Server				
			т	est Connection Apply Cancel
General				Apply
* Server Name	ofsll.in.oracle.com	* Host	ofsll.in.oracle.com	
Port	25	Secure Connection	None	
Security				
Username		Password		

8. The MDB email server is successfully added as indicated.

	sher Enterprise Search	All	•	Administration	Help 🔻	Sign Out
Administration		Home	Catalog New	▼ Open ▼	Signed In As	weblogic 💌
Administration > Email						0
Delivery						
Delivery Configuration Printer	Fax Email WebDAV	HTTP FTP Content Se	erver CUPS Server			
Server Name	Host	Port		Delete		
ofsll.in.oracle.com	ofsll.in.oracle.com	25		Î		
Add Server						

