BIP Installation Guide

Oracle Financial Services Lending and Leasing

Release 14.7.0.0.0

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BIP Installation Guide
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Table of Contents

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   Prerequisites

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_202 or above (https://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html)

2. Oracle WebLogic Server 12c Version 12.2.1.3.0 (Fusion Middleware Infrastructure Installer) http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-main-097127.html

3. Oracle BI Publisher Version BI 12.2.1.3.0 / 12.2.1.4.0 http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html

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Note

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

1.2   Audience

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/ $OFSLL_HOME	Oracle Financial Services Lending and Leasing Home Directory

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2.1 <u>Installing BI Publisher</u>

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.

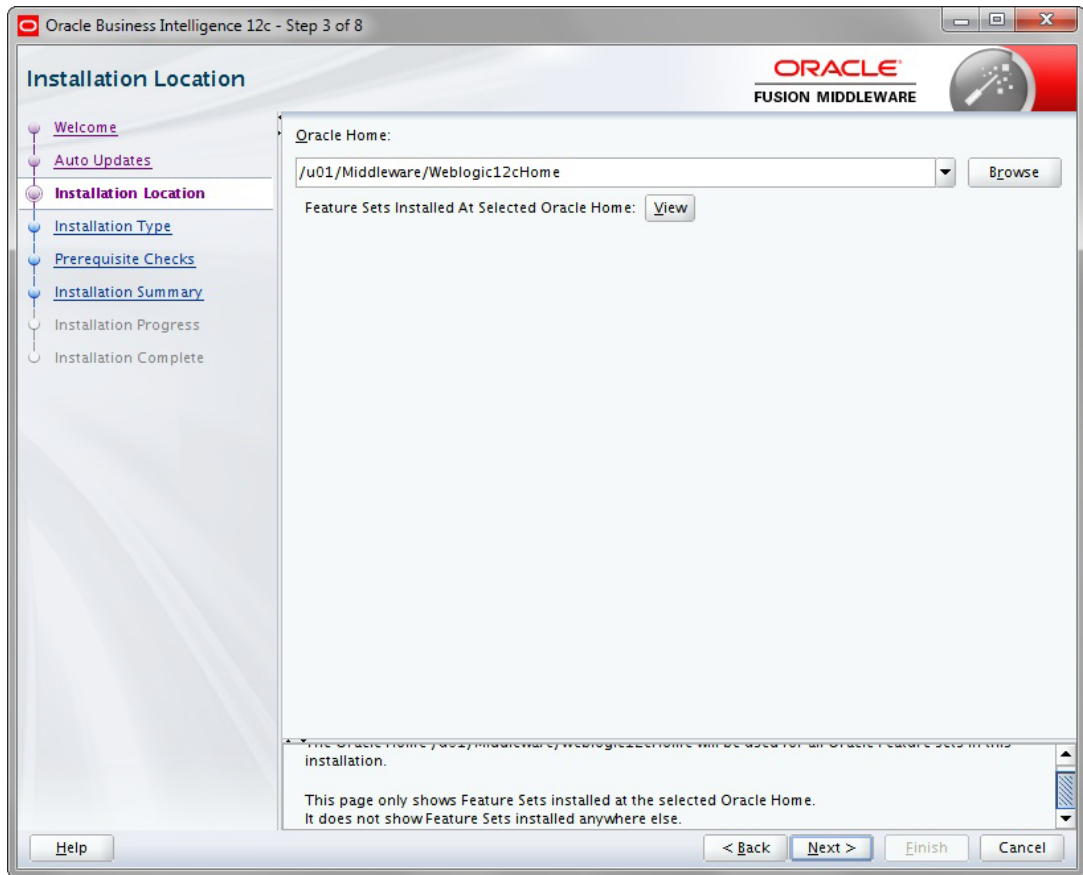5. Click 'Next'. The following window is displayed.
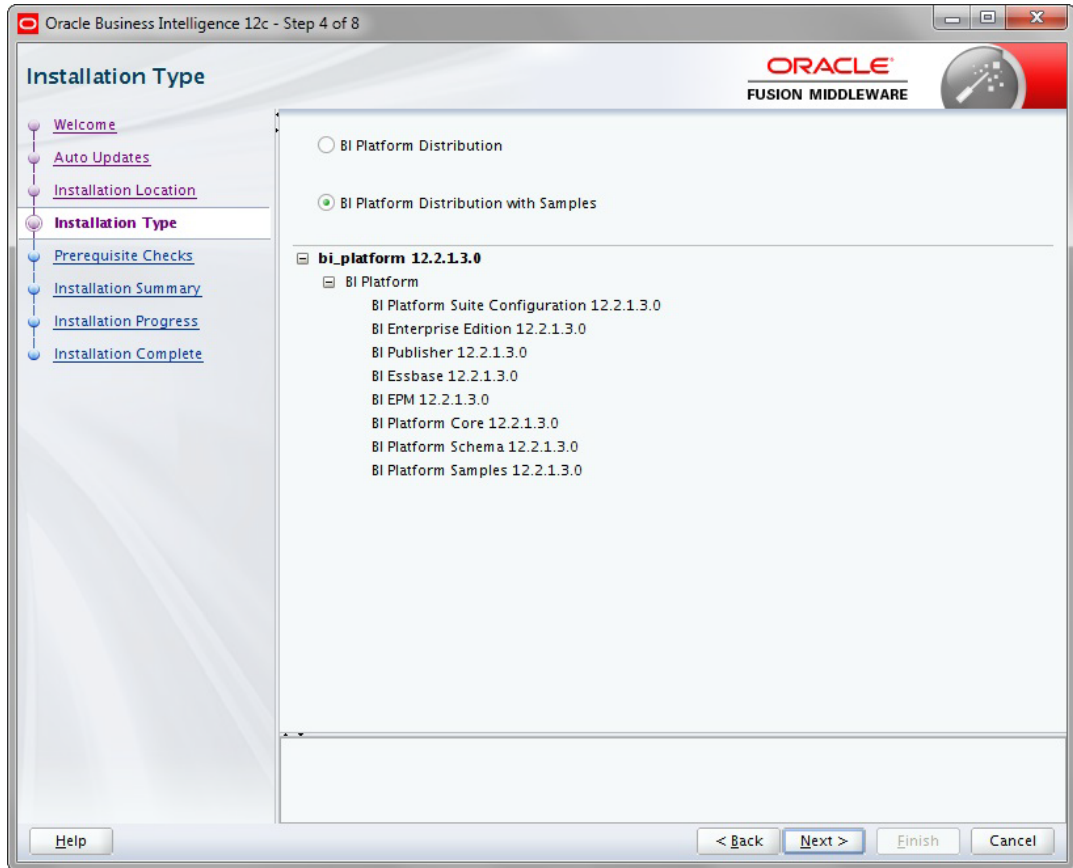
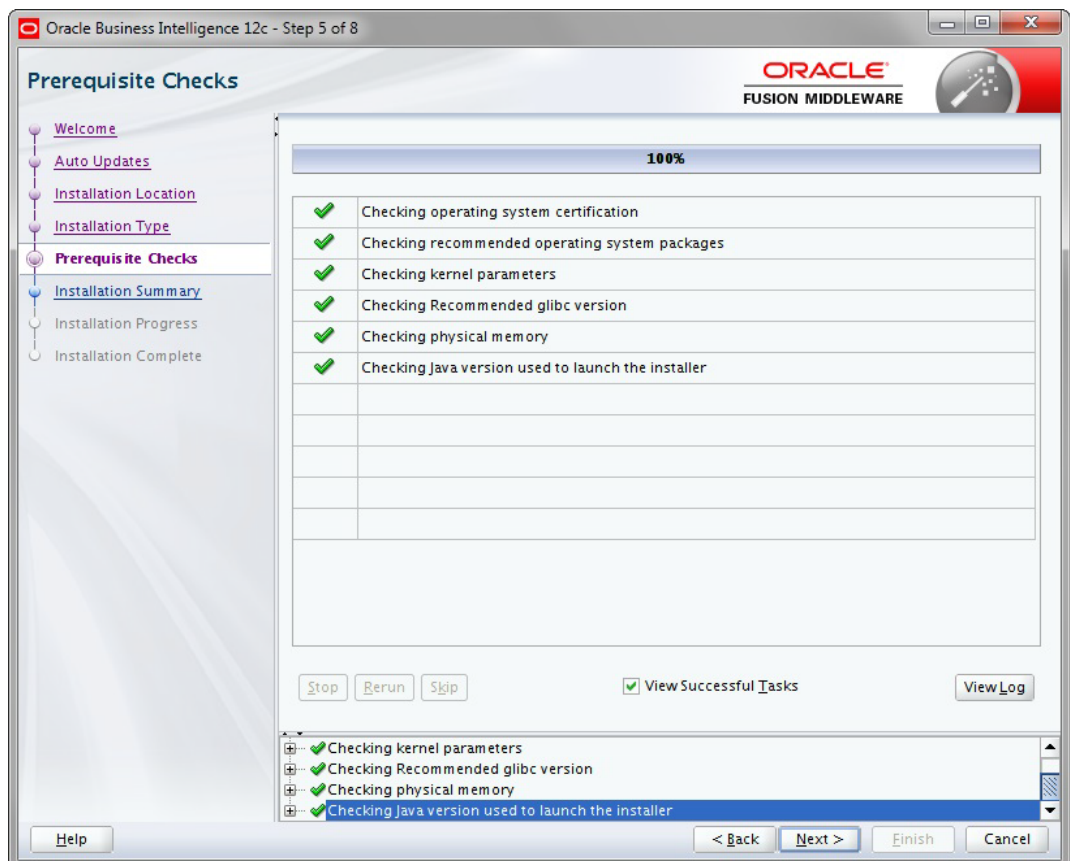6. Select the option 'Skip Software Updates'.
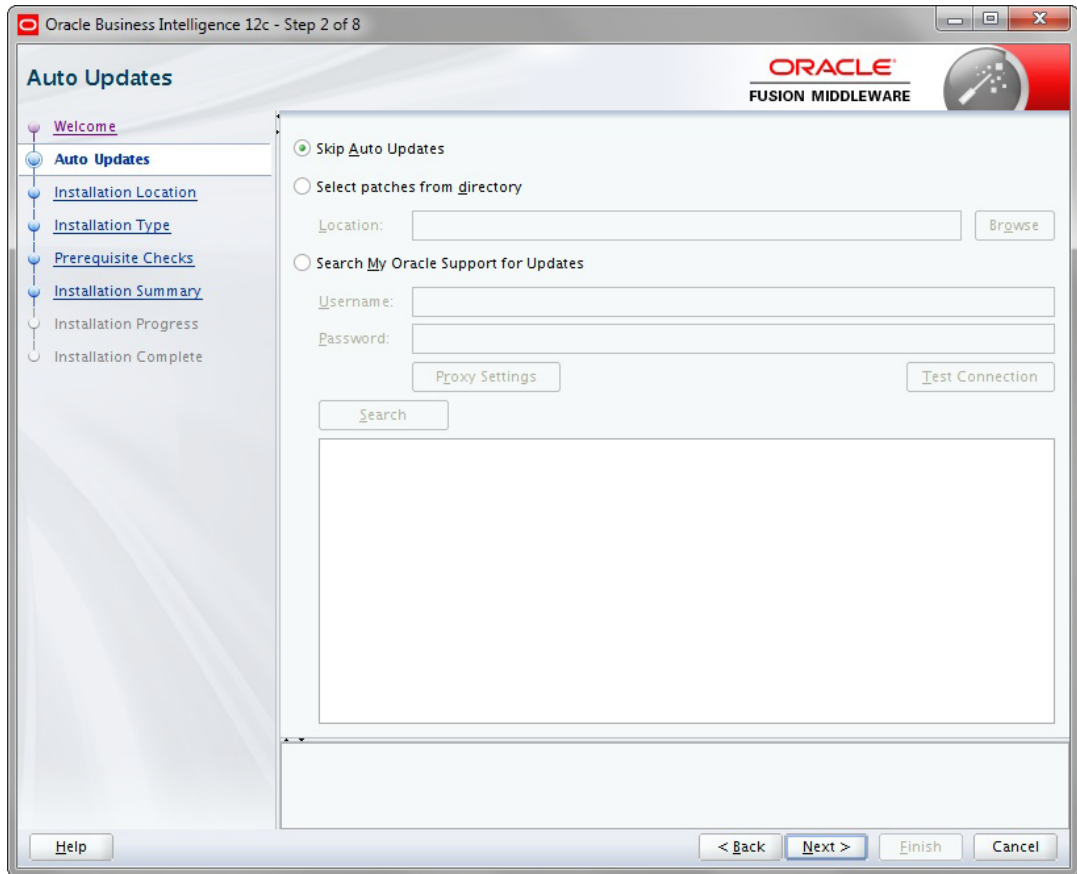
7. Click 'Next'. The following window is displayed.

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

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

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

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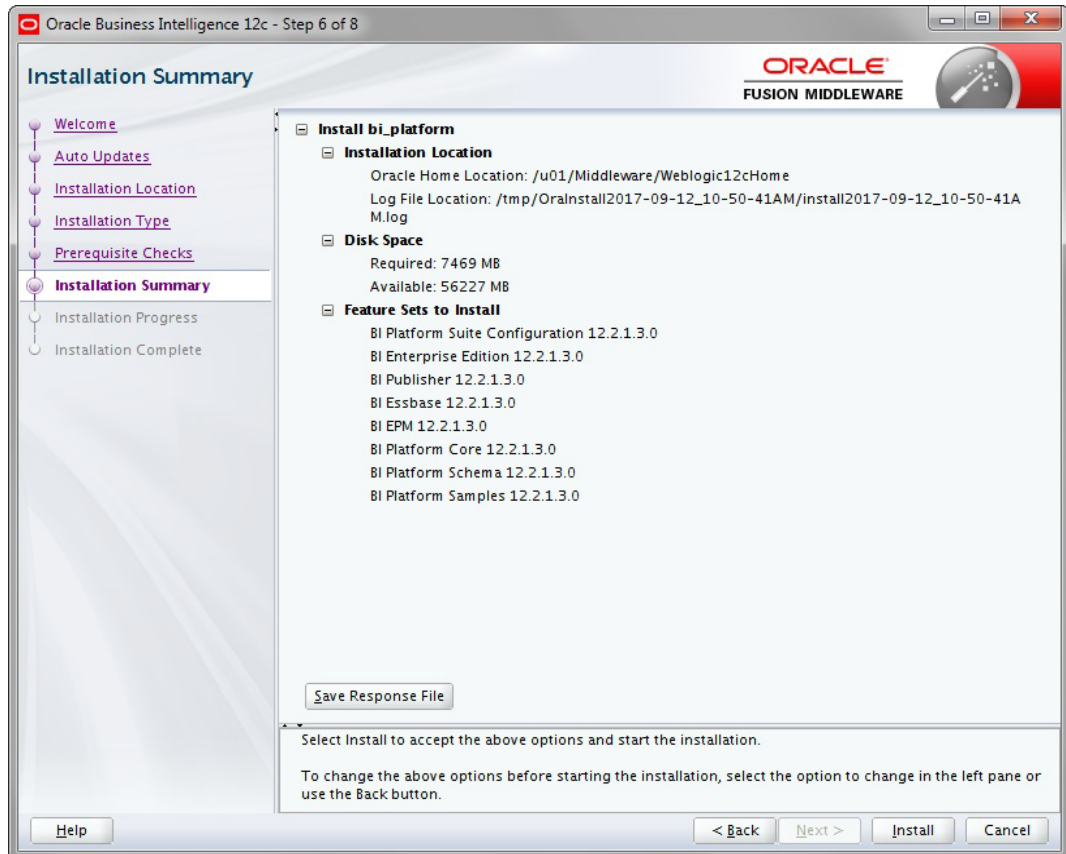
12. The following window is displayed. Click 'Next'.

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

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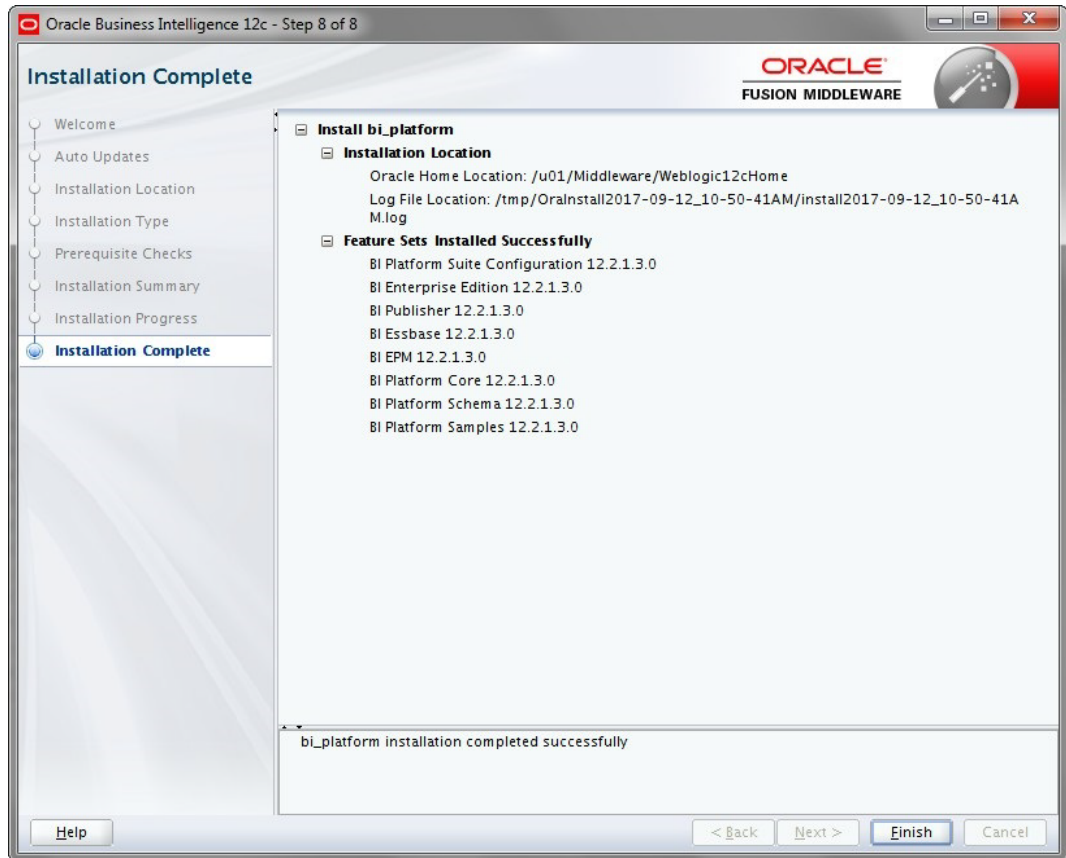
3. Configuring BI Publisher

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.

3. Select the option 'Business Intelligence Publisher' and Click 'Next'.
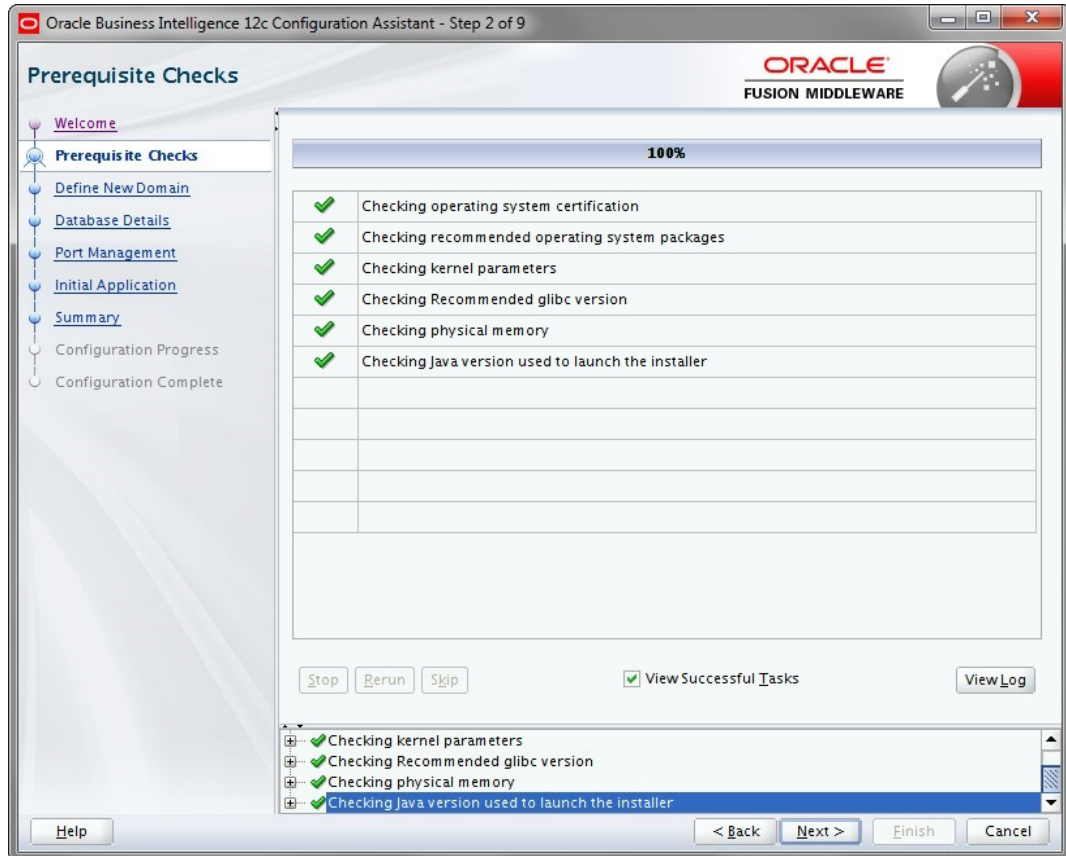
4. Click 'Next'. The following window is displayed.

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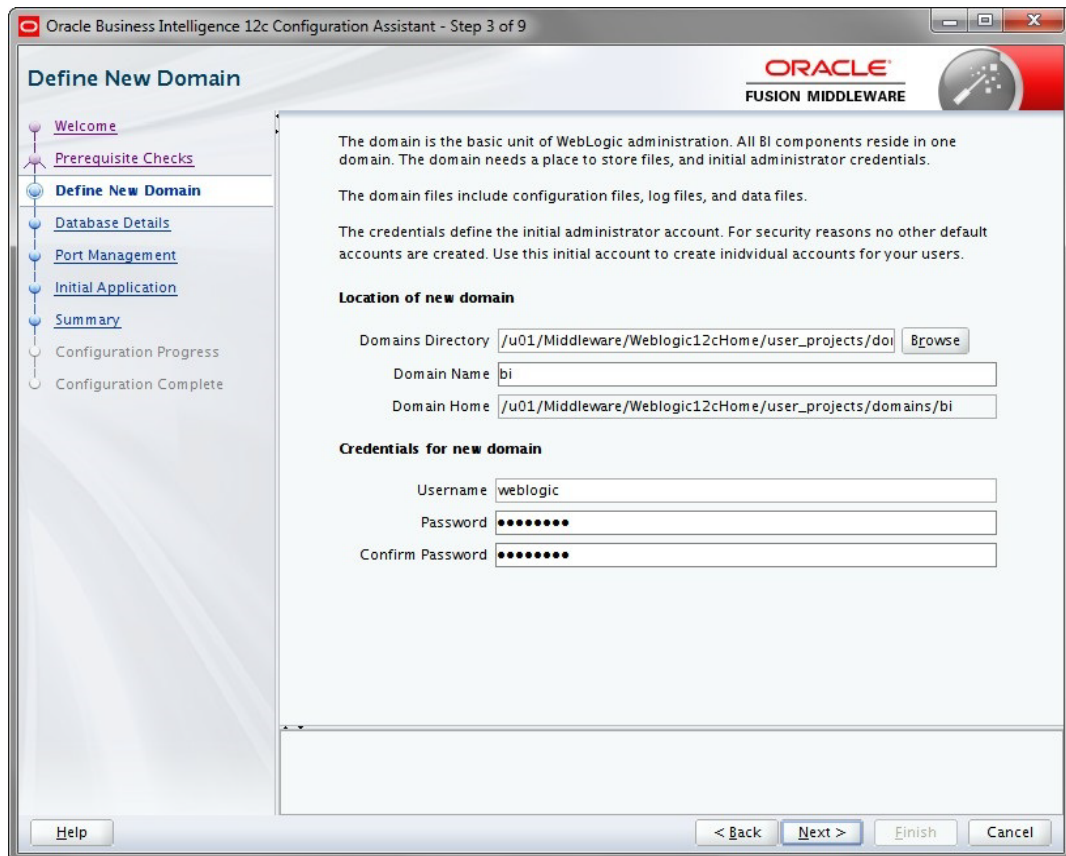
5. Enter the User Name, Password and Domain Name for BI Publisher domain. Click 'Next'. The following window is displayed.
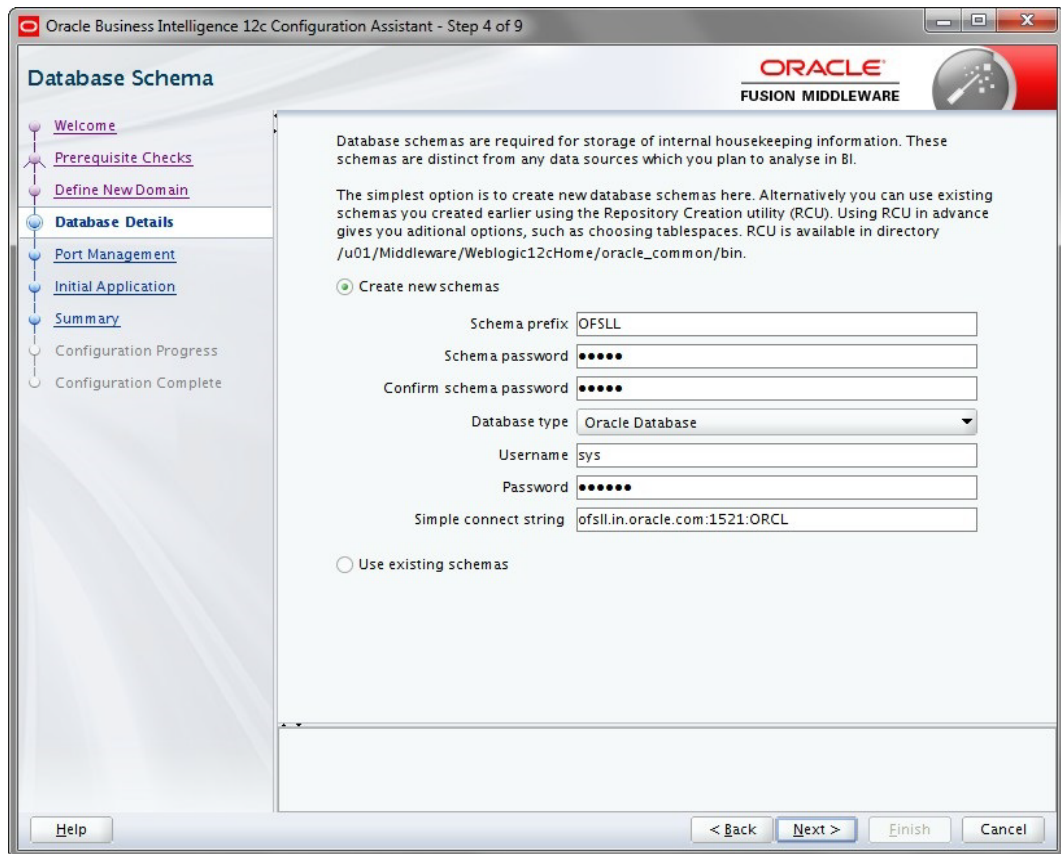
6. Select the option 'Create New Schema' and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.

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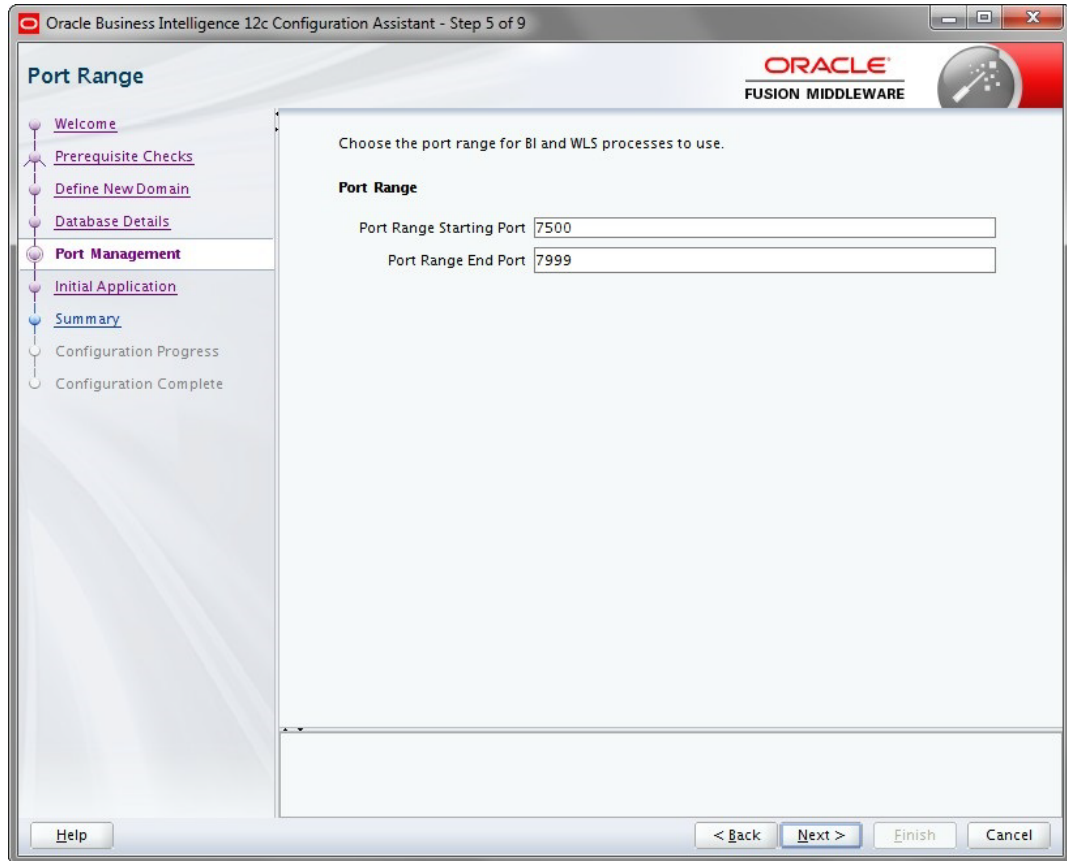
8. Click 'Next'. The following window is displayed.

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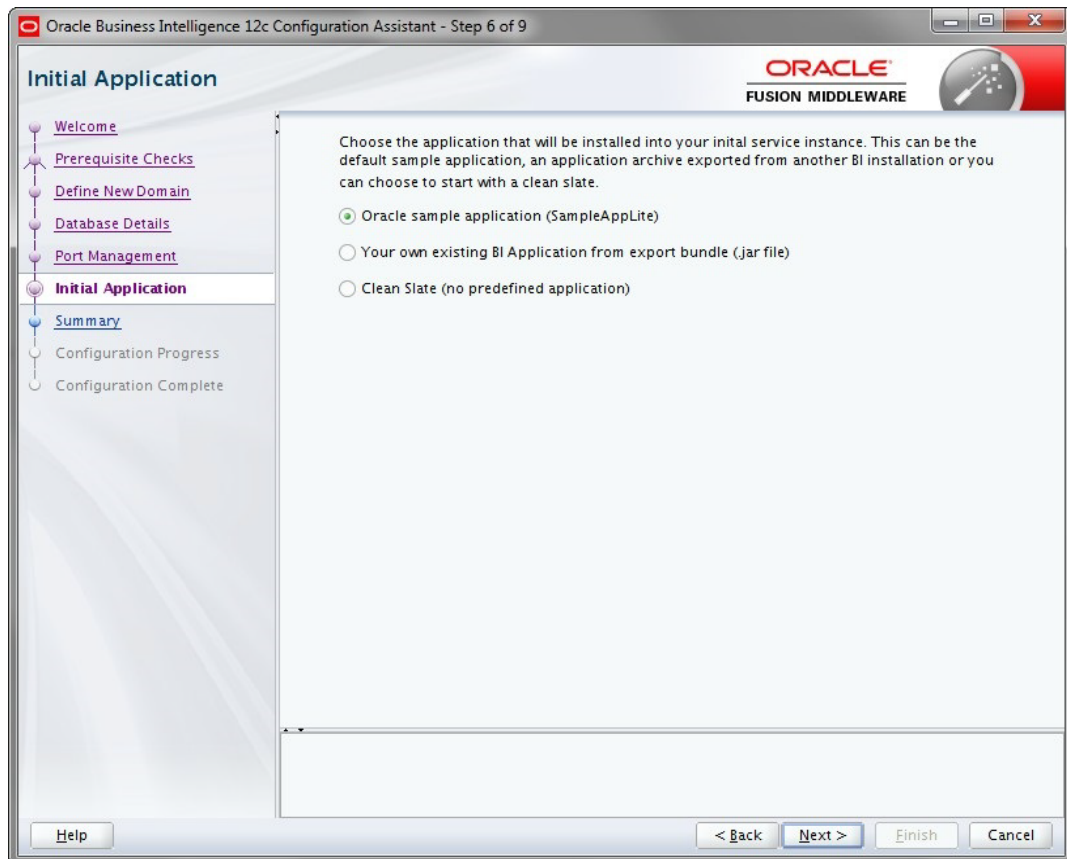
9. Click 'Next'. The following window is displayed.
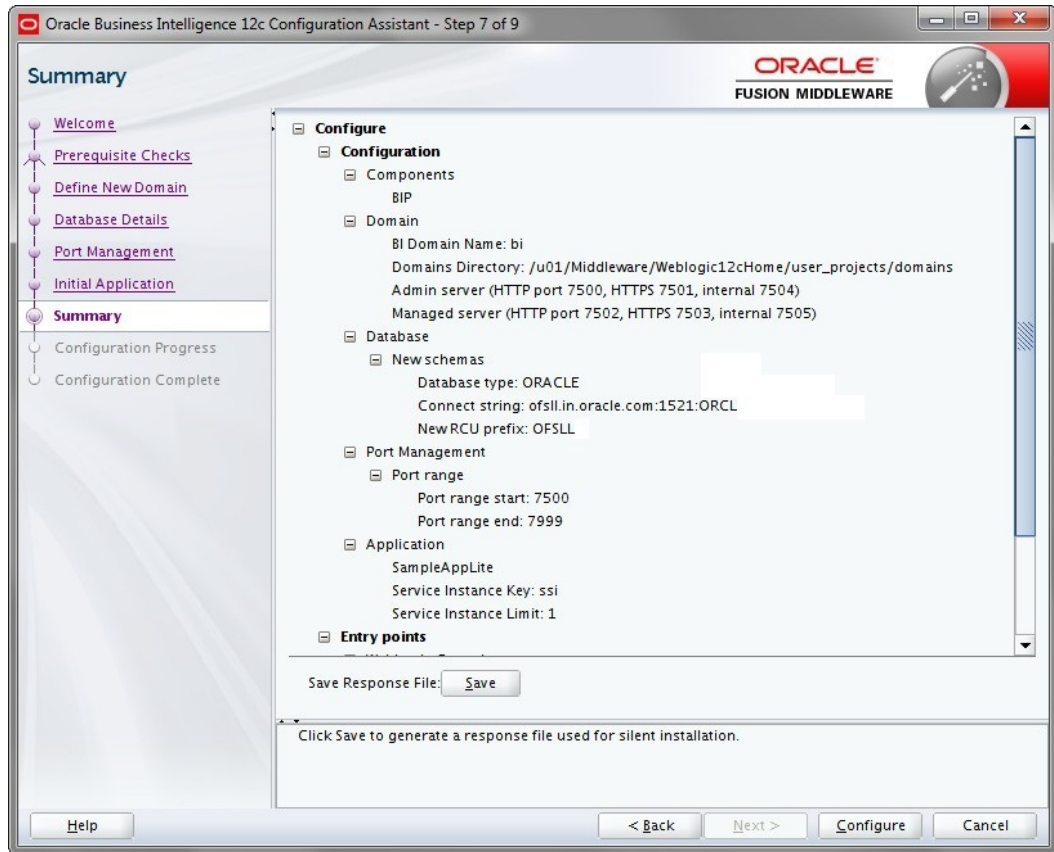
10. Click 'Configure'. The following window is displayed.

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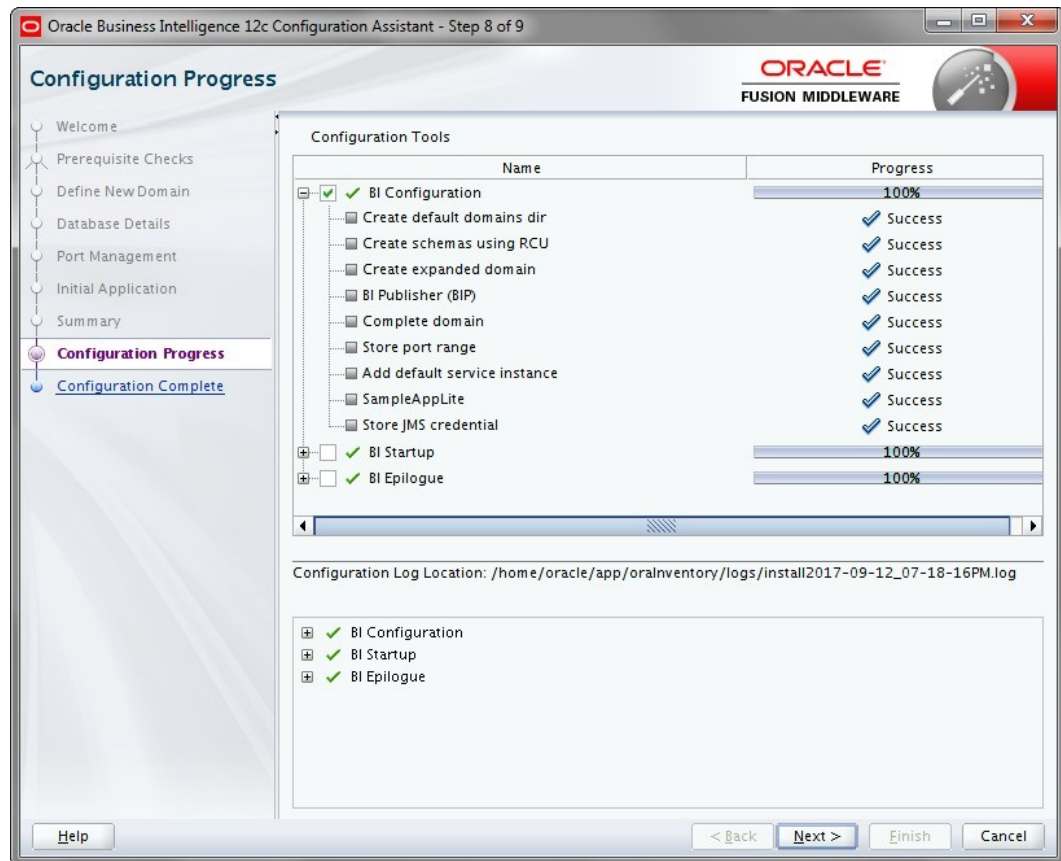
11. Click 'Next'. The following window is displayed
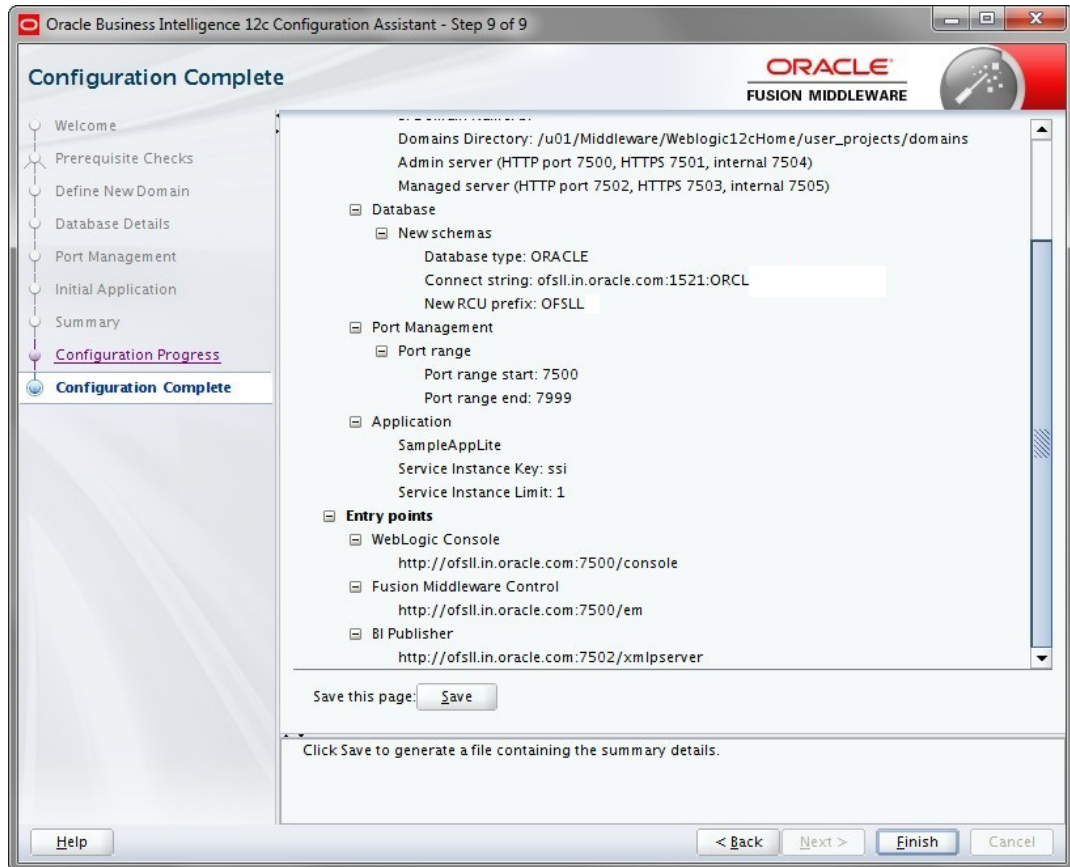
12. Click 'Save' and save the Response File.

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 http://hostname:<port>/ xmlpserver.

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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 appropriate database driver.

– Target the datasources to 'bi_server1'

1. Access the weblogic console URL using http://hostname:<port>/console.

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

3. Login using the same credentials used for 'WebLogic administration' console login. The following window is displayed.
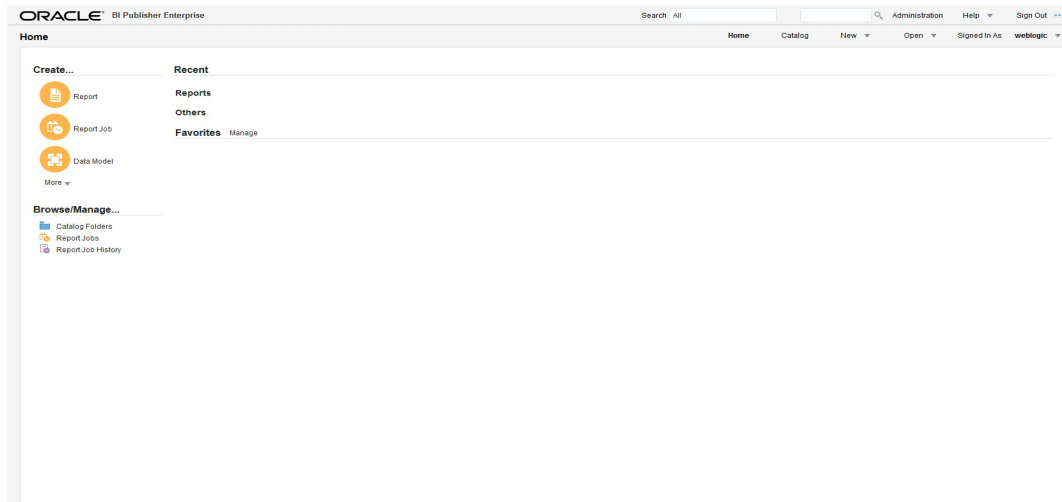
4. Click 'Administration' in the header section. The following window is displayed.
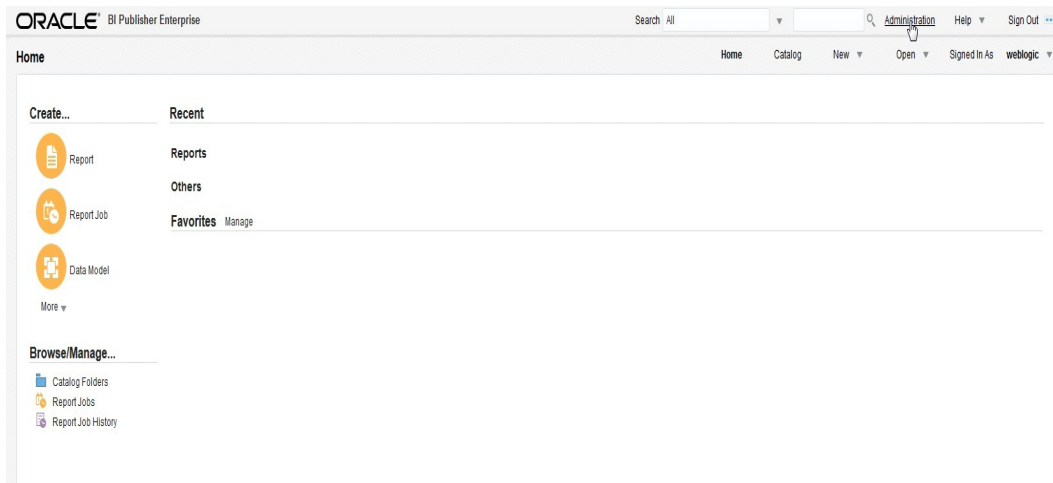
5. Click 'JNDI Connection'.

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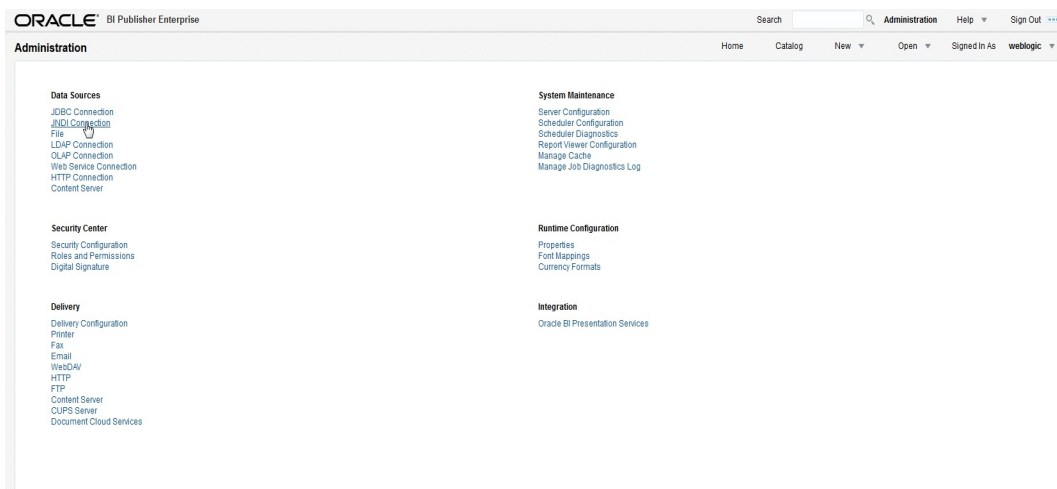
6. The following window is displayed.
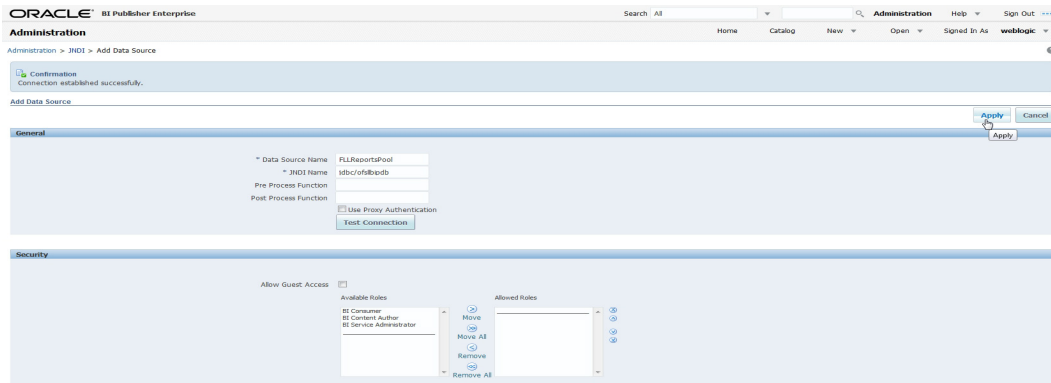
7. Add the following details:

- 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 Creating Roles

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.

2. Select Weblogic Domain > Security > Application Roles as indicated in the following screen.

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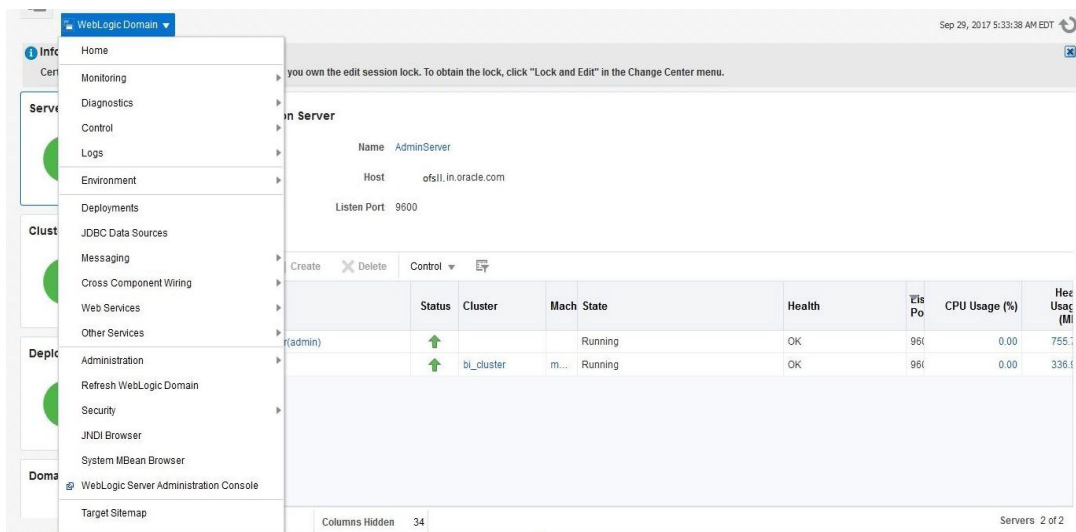
3. In the Application Stripe field, select 'obi' from the drop-down list. The option 'BIServiceAdministrator' is added by default. Click 'Create'.

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

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.

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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.
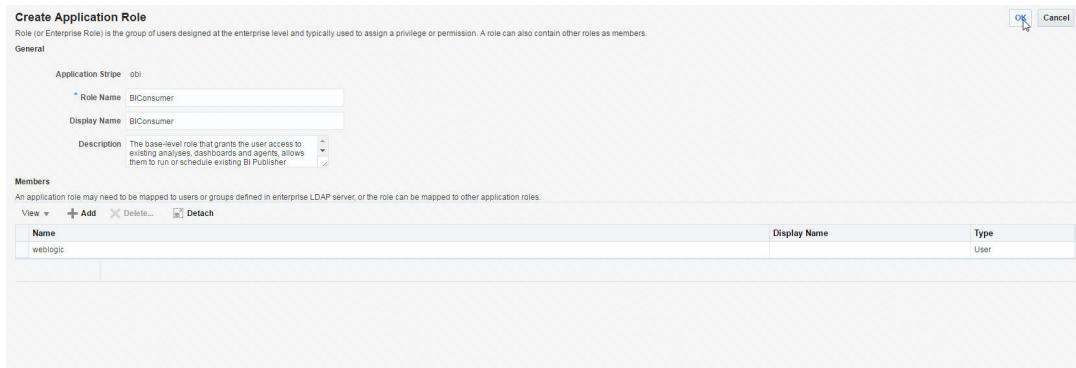
7. Click 'OK'. The new role is added to the list of application roles.
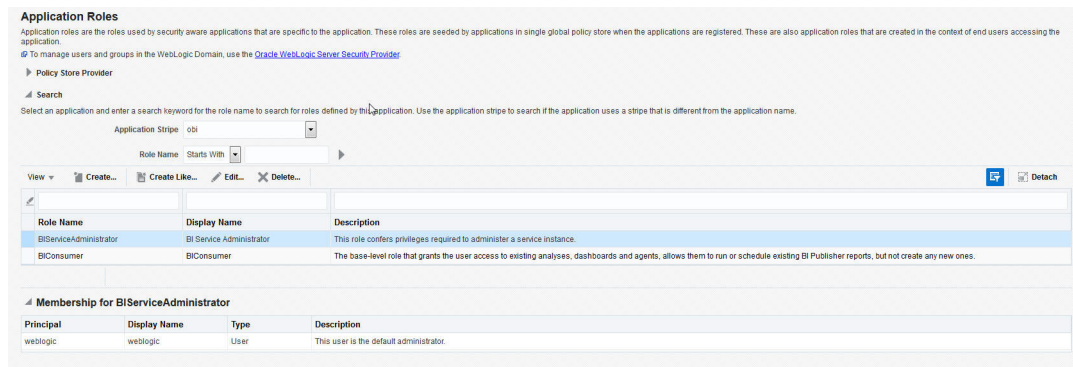
To Create WebLogic Application Policies

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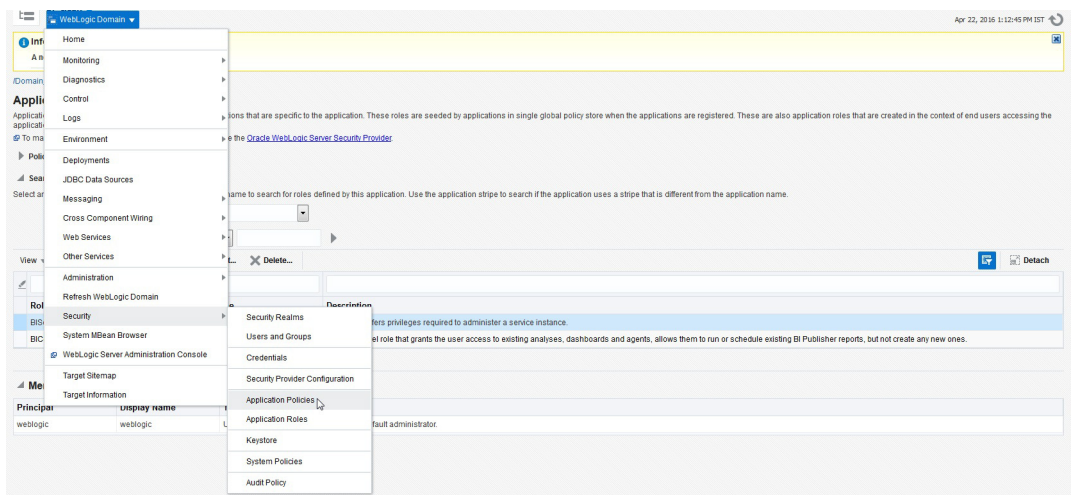
3. In the Application Stripe field, select 'obi' from the drop-down list. Click 'Create'.

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

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

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

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

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

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

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10. Once done, click 'OK'.

Application Policies

Application policies are the authorization policies that an application relies upon for controlling access to its resources.
ℹ To manage users and groups in the WebLogic Domain, use the Oracle WebLogic Server Security Provider.

▶ Policy Store Provider

◢ Search

Select an application and enter the search keyword for principals or permissions to query application security grants. Use the application stripe to search if the application uses a stripe that is different from the application name.

Application Stripe	obi ▾
Principal Type	Application Role ▾
Principal Name	Starts With ▾ ▶

View ▾ | 🗑 Create... | 📋 Create Like... | ✎ Edit... | ✖ Delete... | 📇 | Detach

Principal	Display Name	Description
BIConsumer	BIConsumer	
BIServiceAdministrator	BI Service Administrator	

◢ Policies for BIConsumer

Permissions
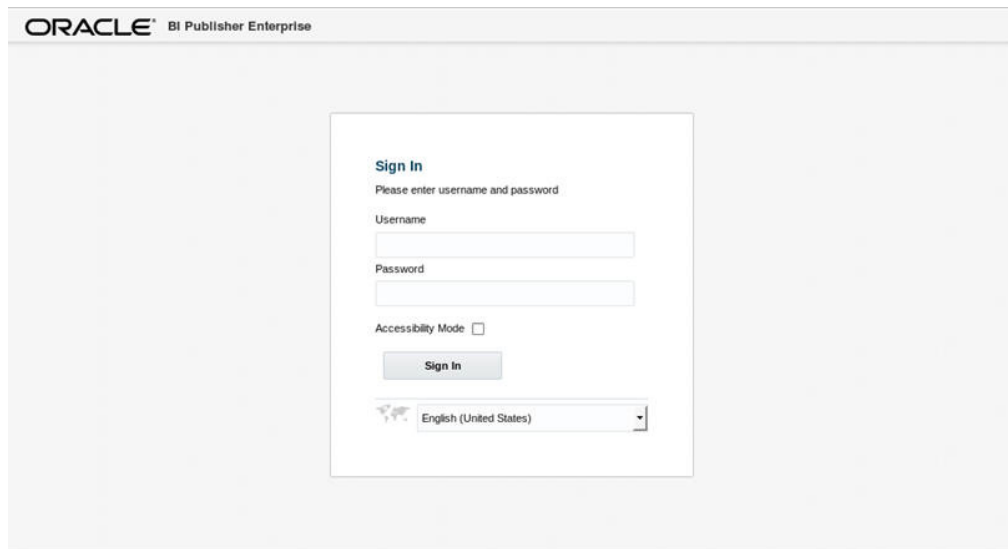
Resource Name	Resource Type	Permission Actions	Permission Class	Permission Set
oracle.bi.publisher.runReportOnline	oracle.bi.publisher.permi...	_all_	oracle.security.jps.ResourcePermission	
oracle.bi.publisher.accessOnlineReportAnalyzer	oracle.bi.publisher.permi...	_all_	oracle.security.jps.ResourcePermission	
oracle.bi.publisher.accessExcelReportAnalyzer	oracle.bi.publisher.permi...	_all_	oracle.security.jps.ResourcePermission	

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5. Importing Reports to BI Publisher Server

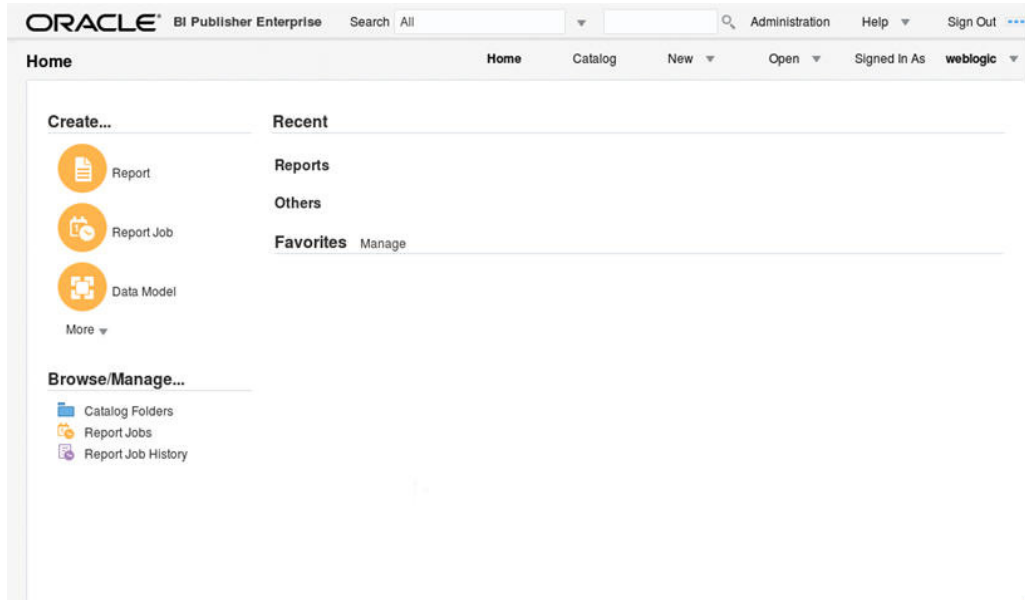To import ofsll application reports to BI Publisher Server, do the following:

1. Copy and extract the OFSLLReports.zip file to staging area.

2. Launch the Oracle Business Intelligence Publisher Application using http://hostname:port/xmlpserver

3. Login with valid credentials.

4. Following window is displayed. Click on 'Catalog Folders' on the left pane.
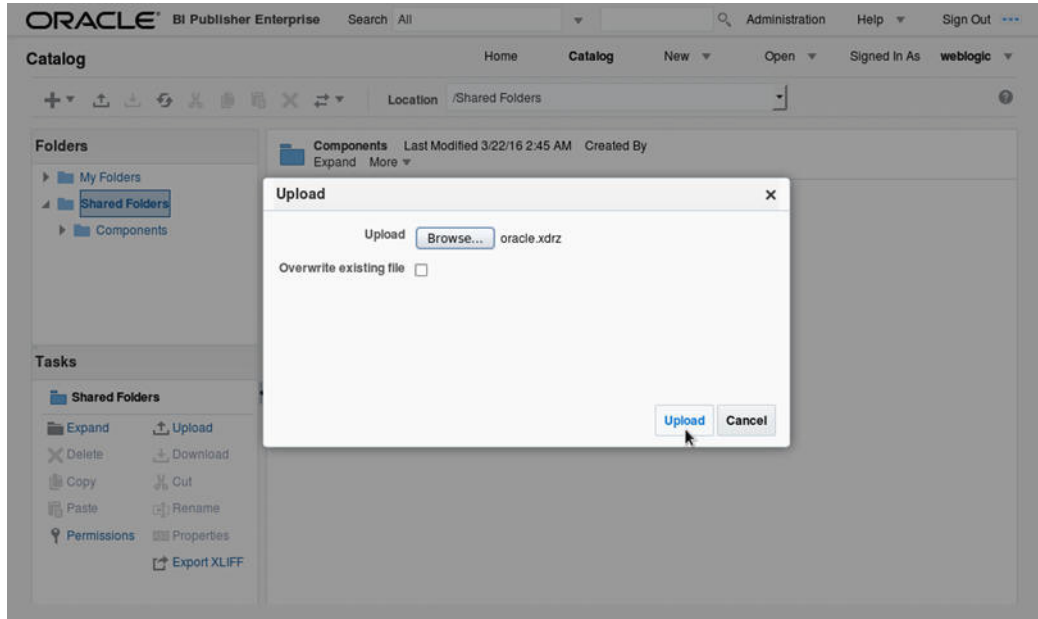
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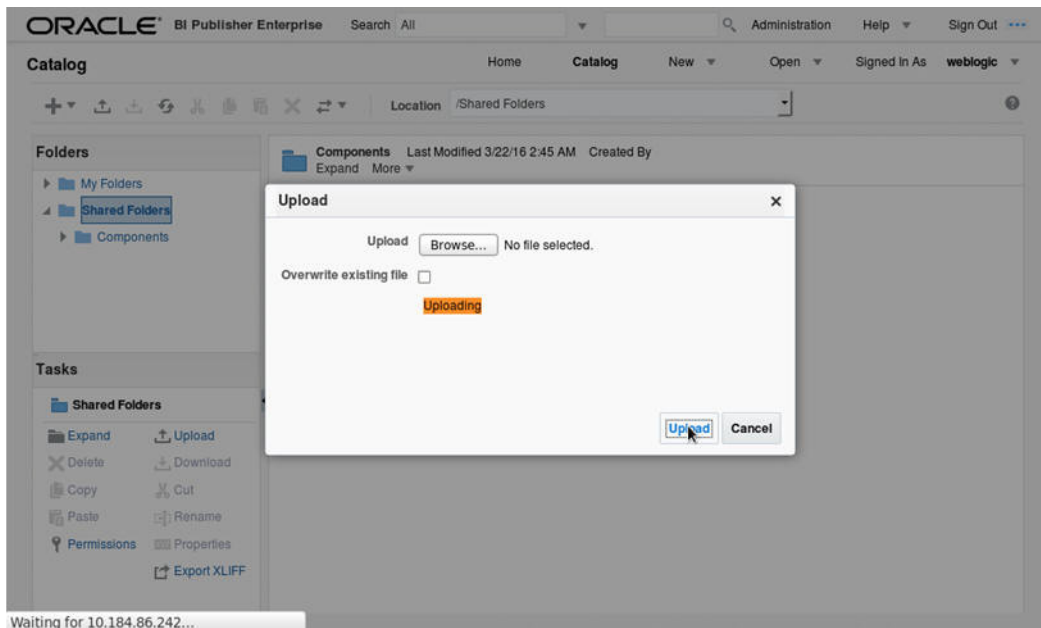5. Click on 'Shared Folders' option and then click 'Upload'.
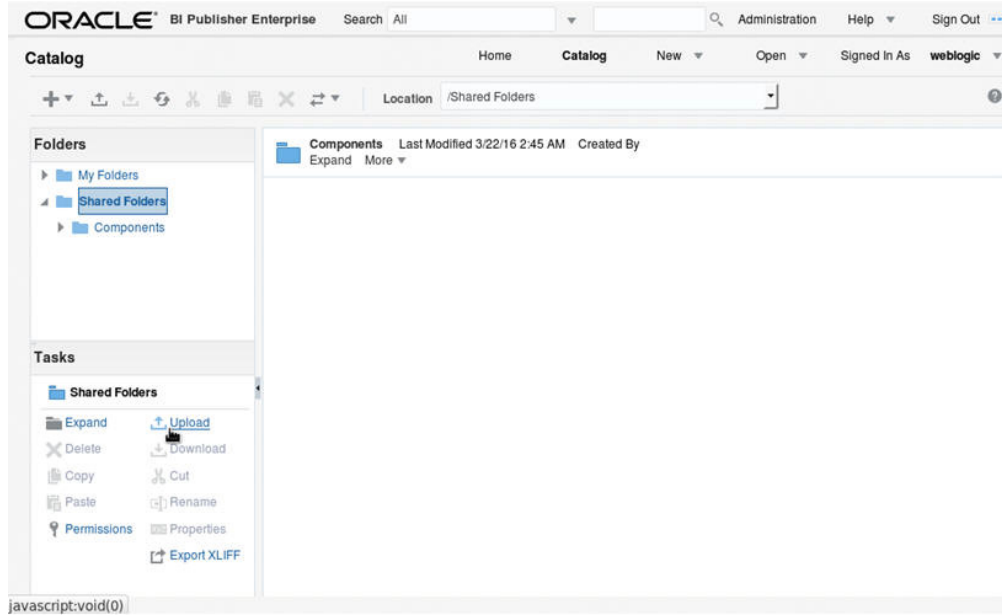
6. The following window is displayed. Browse to the location where the oracle.xdrz file is saved. Click the 'Overwrite Existing File' check box if you are overwriting an existing directory.
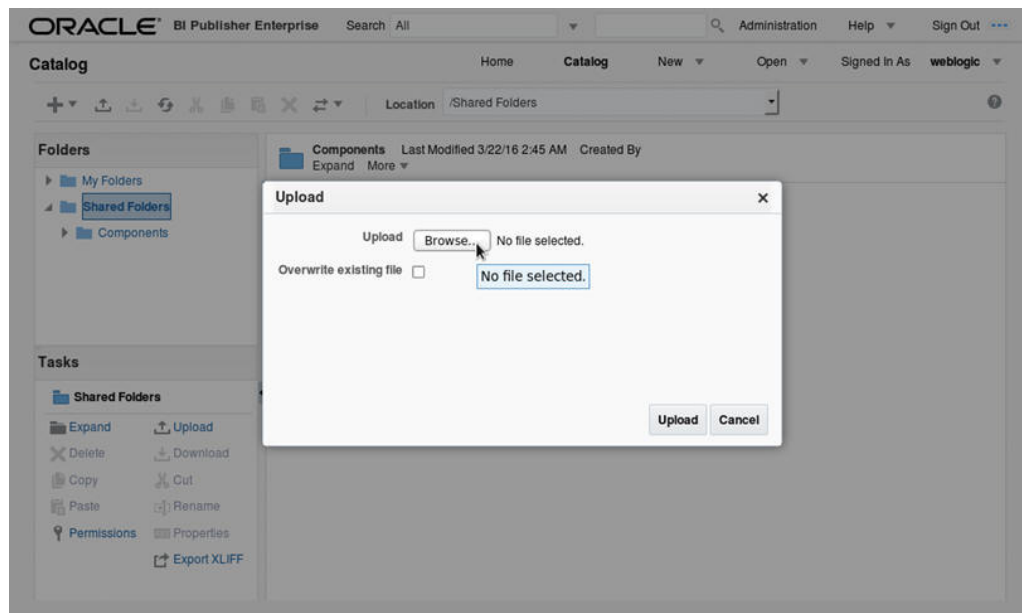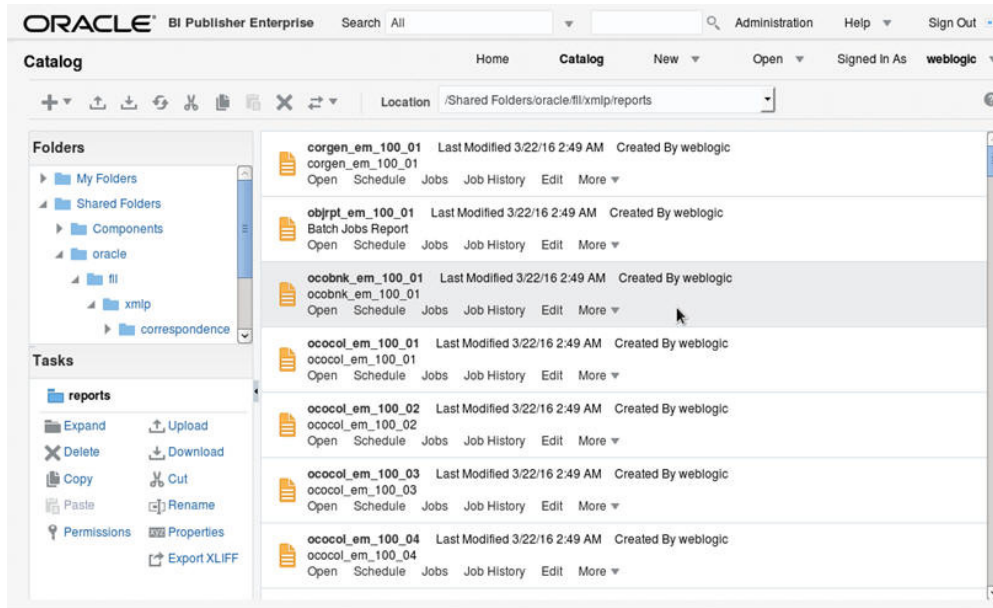
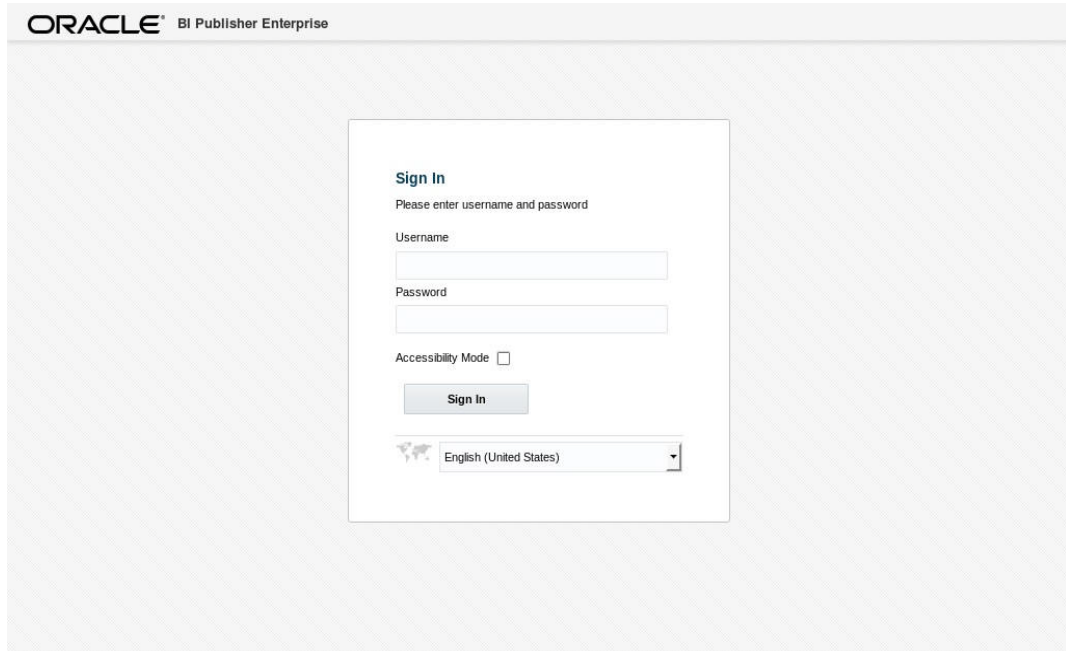7. Click on 'Upload'.

8. The following window is displayed.

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

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6. Configure MDB Mail Server

Refer to the following instructions to configure the MDB email server. This is required for outbound email communications.
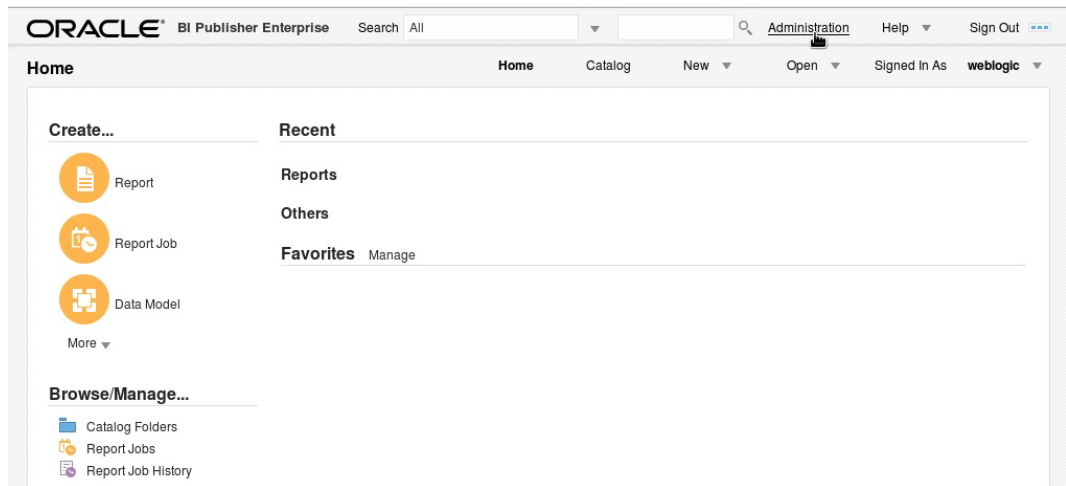
1. Launch the Oracle Business Intelligence (BI) Publisher application (http://hostname:port/xmlpserver). The following window is displayed.

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

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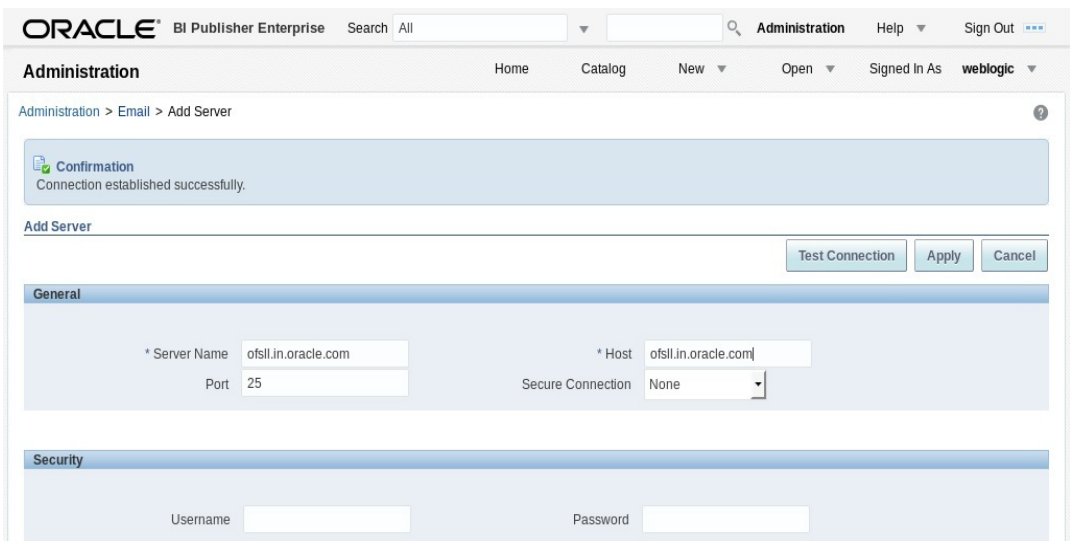3. Click 'Administration'. The following window is displayed.
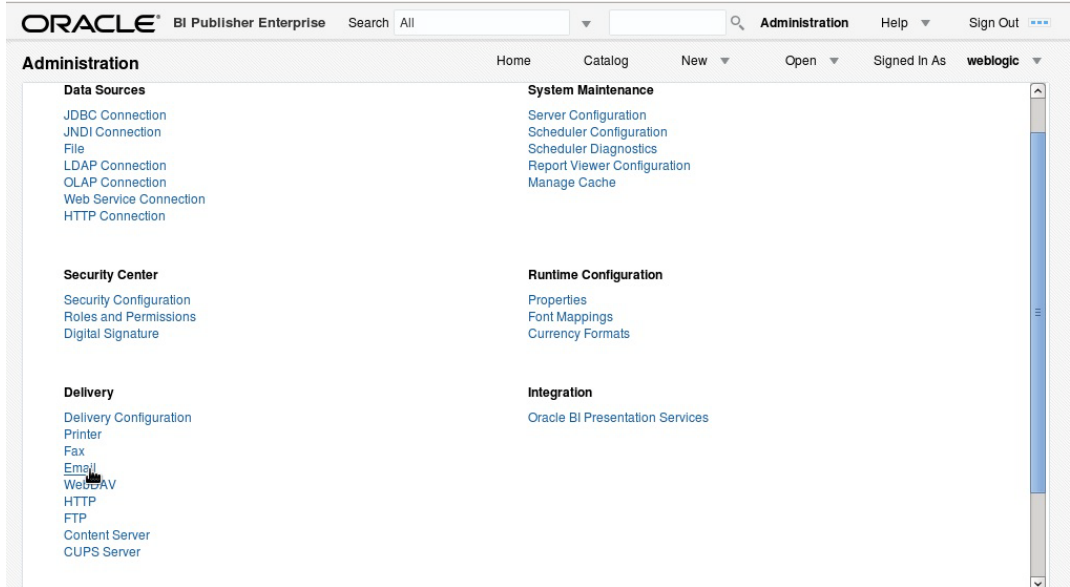
4. Click 'Email'. The following window is displayed.
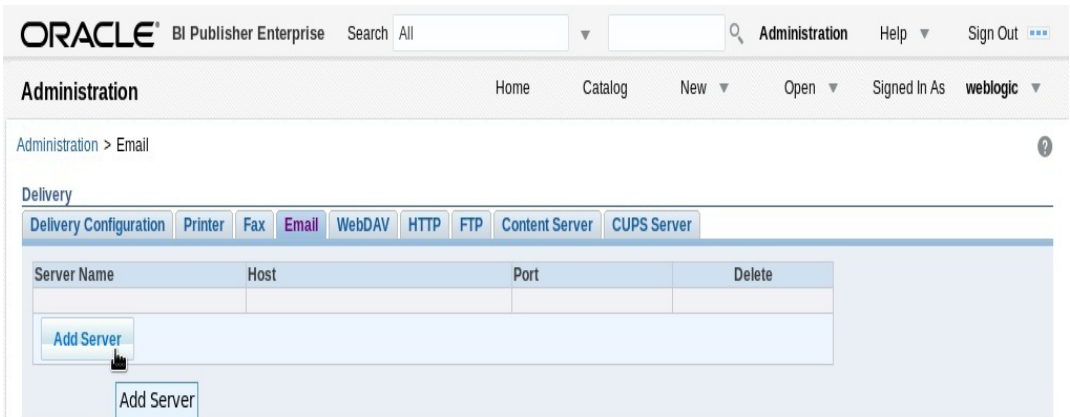
5. Click 'Add Server'. The following window is displayed.

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

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

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

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