

OAS Installation Guide

# **Oracle Financial Services Lending and Leasing**

Release 14.10.0.0.0

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OAS Installation Guide  
December 2020  
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Oracle Financial Services Lending and Leasing User Documentation

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- Do you need different information or graphics? If so, where, and in what format?
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# 1. Preface

This document contains notes and installation steps needed to install and Configure Oracle Analytics 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.*

Oracle Analytics Publisher installation consists of the following steps.

- [Installing OA Publisher](#)
- [Configuring OA Publisher](#)
- [Creating OA Publisher Datasource](#)
- [Importing Reports to OA 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\_261 or above (<https://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html>)
  2. Oracle WebLogic Server 12c Version 12.2.1.4.0 (Fusion Middleware Infrastructure Installer) <http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-main-097127.html>
  3. Oracle Analytic Server (OAS) 5.5.0  
<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.

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## 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/ \$OFSSL_HOME	Oracle Financial Services Lending and Leasing Home Directory

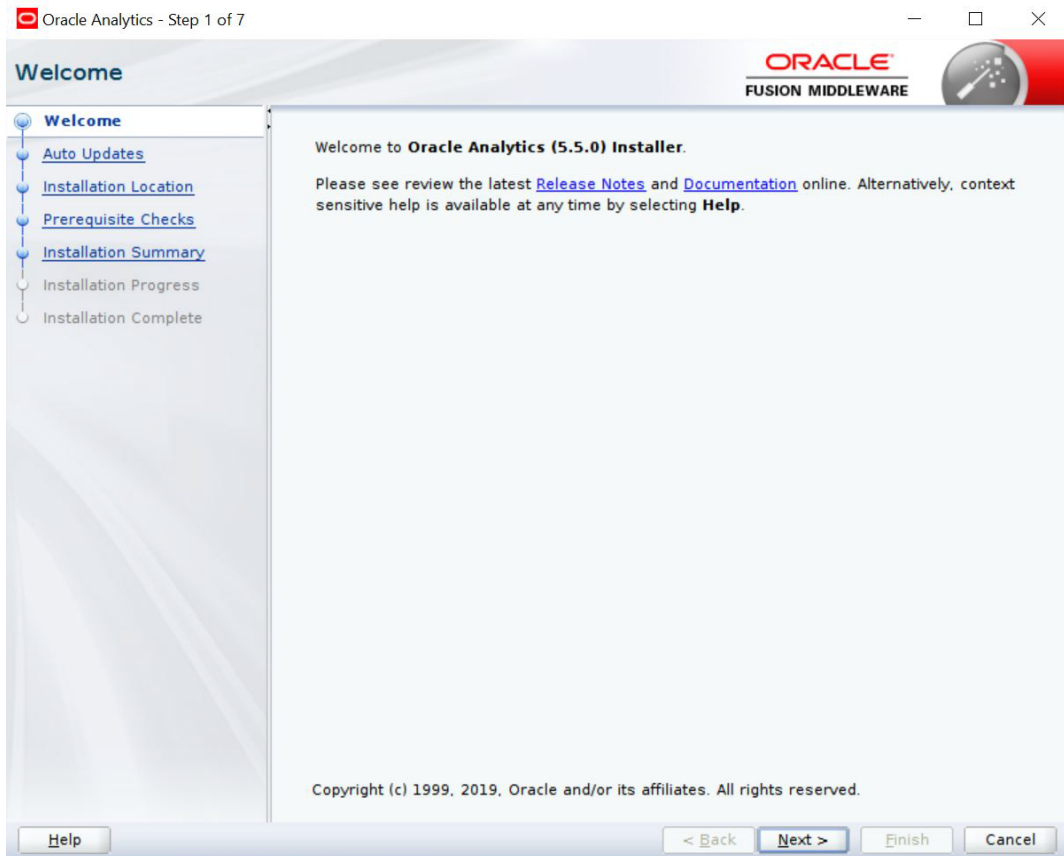
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## 2. Installing OA Publisher

### 2.1 Installing OA Publisher

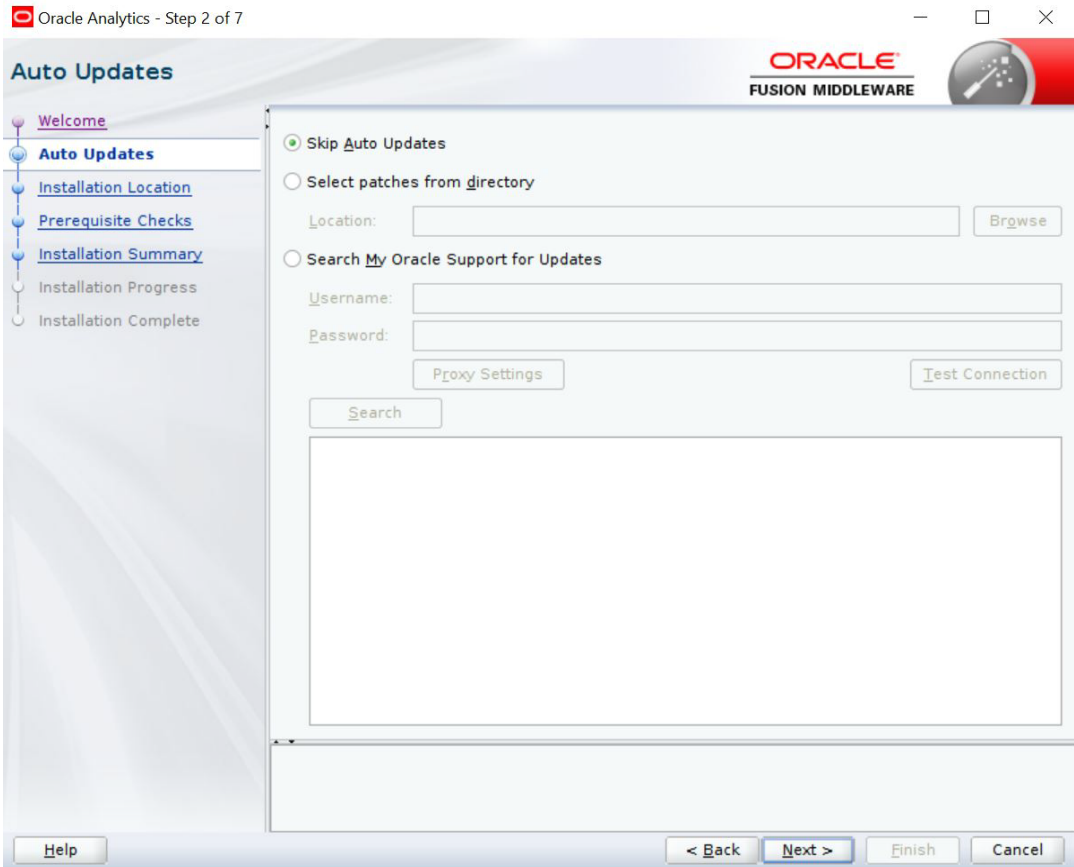
Follow the below steps to install Oracle Analytics publisher:

1. Download and unzip 'Oracle\_Analytics\_Server\_Linux\_5.5.0.zip'.
2. Navigate to .jar file location.
3. Run the command `java -jar Oracle_Analytics_Server_5.5.0.jar`
4. The following window is displayed.



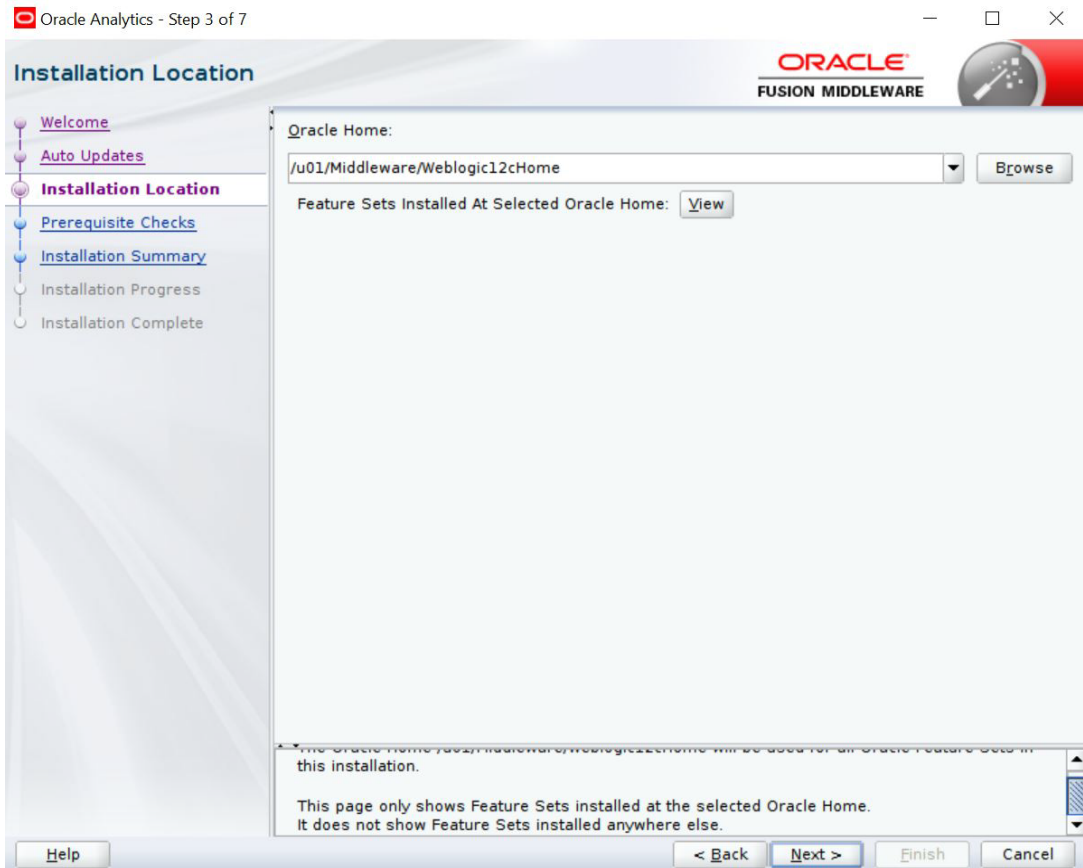
5. Click 'Next'. The following window is displayed.

6. Select the option 'Skip Software Updates'.

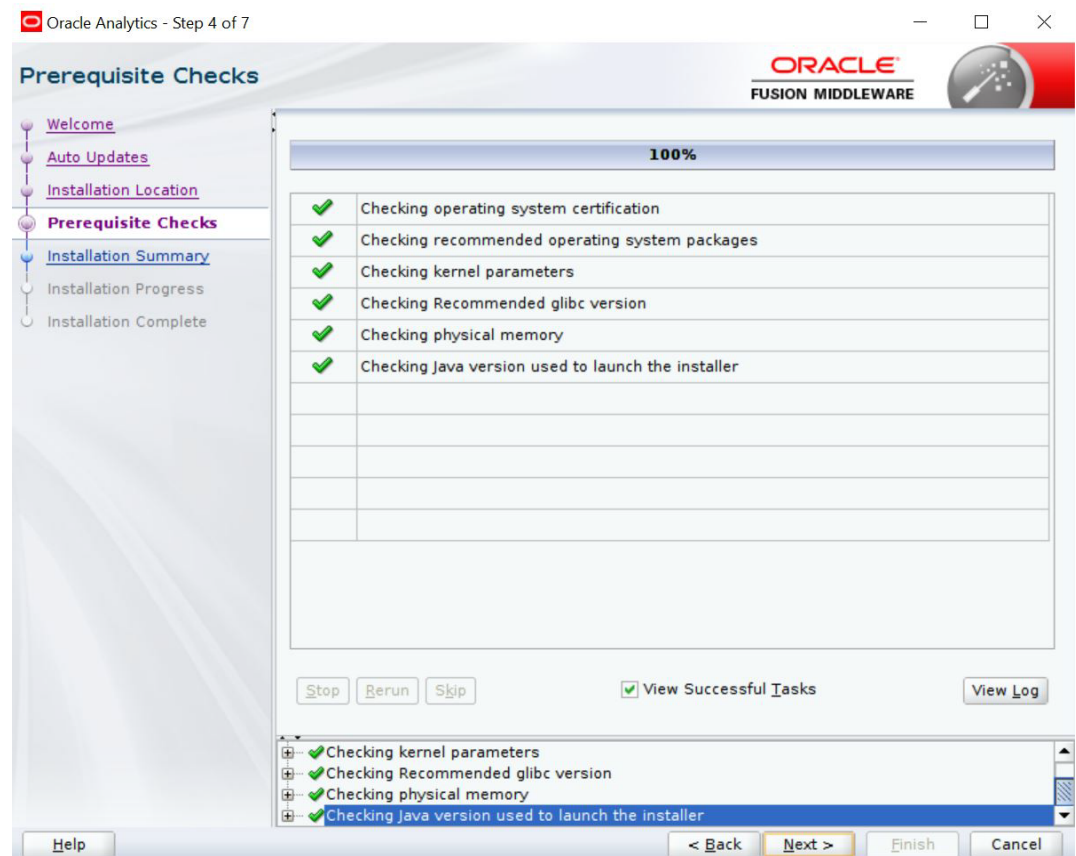


7. Click 'Next'. The following window is displayed.

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

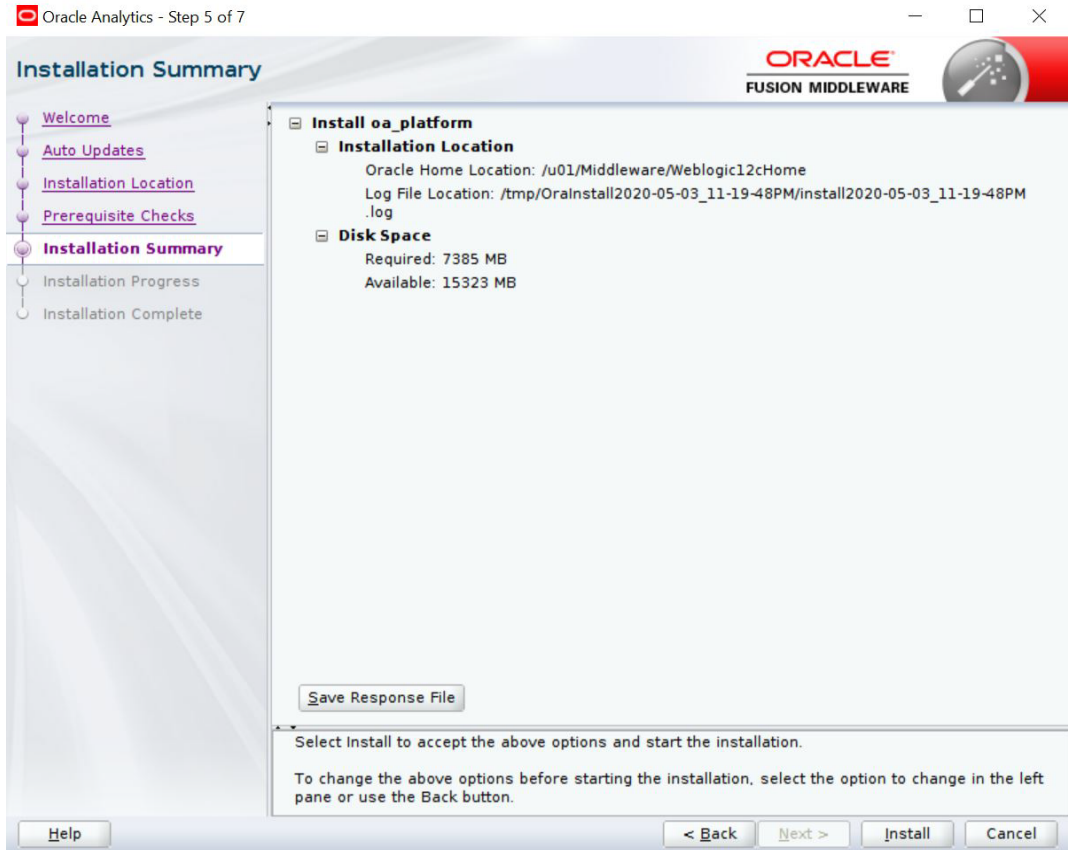


- The following window is displayed. Click 'Next'.





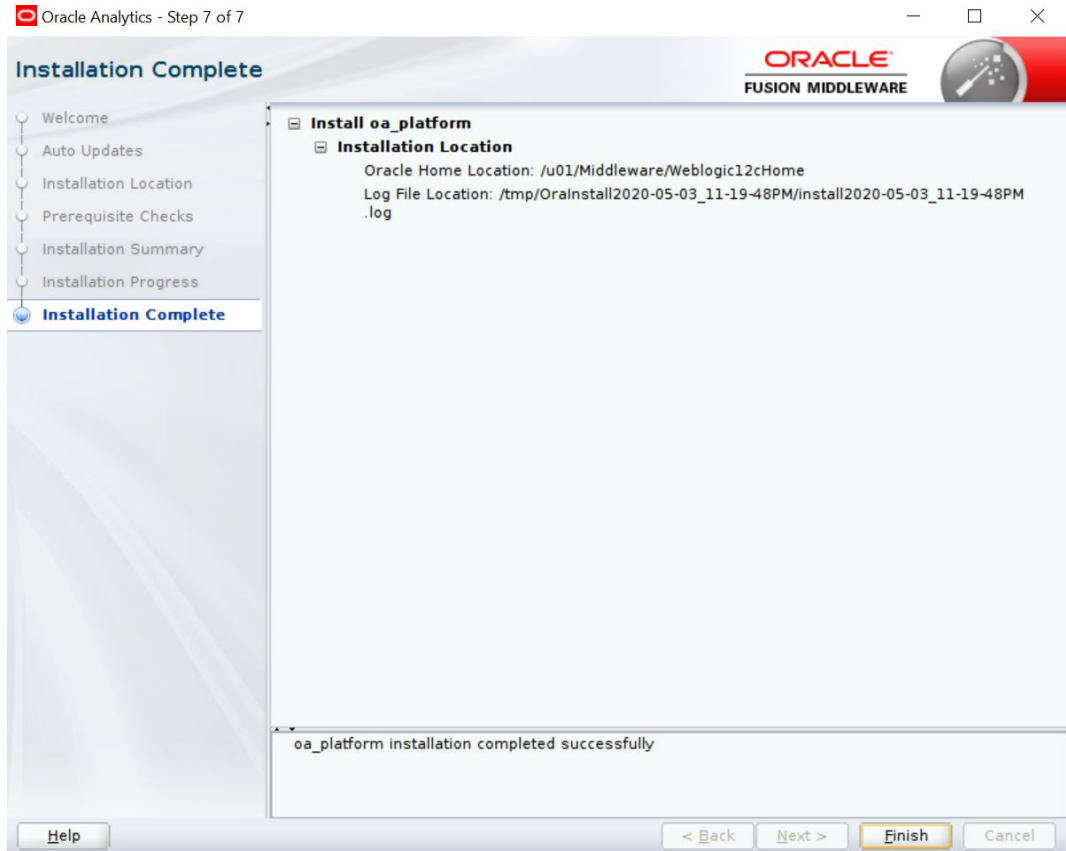
10. The following window is displayed. Click 'Install'.



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



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



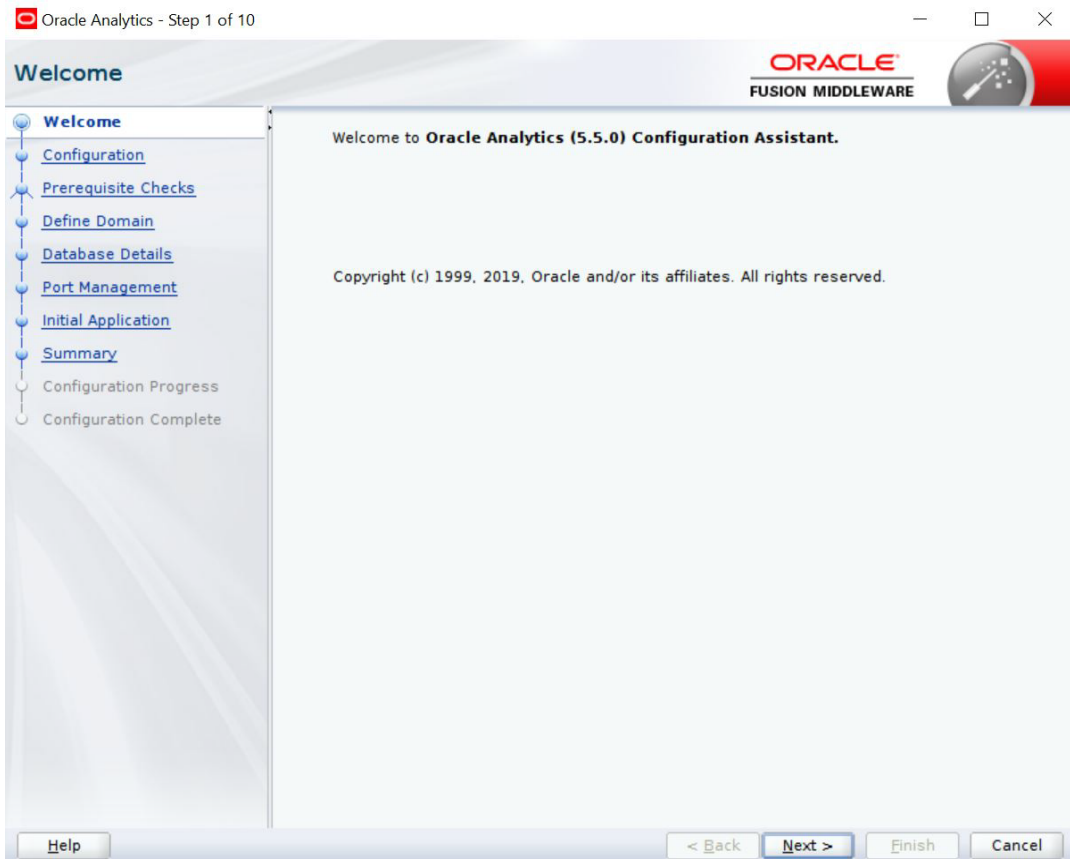
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## 3. Configuring OA Publisher

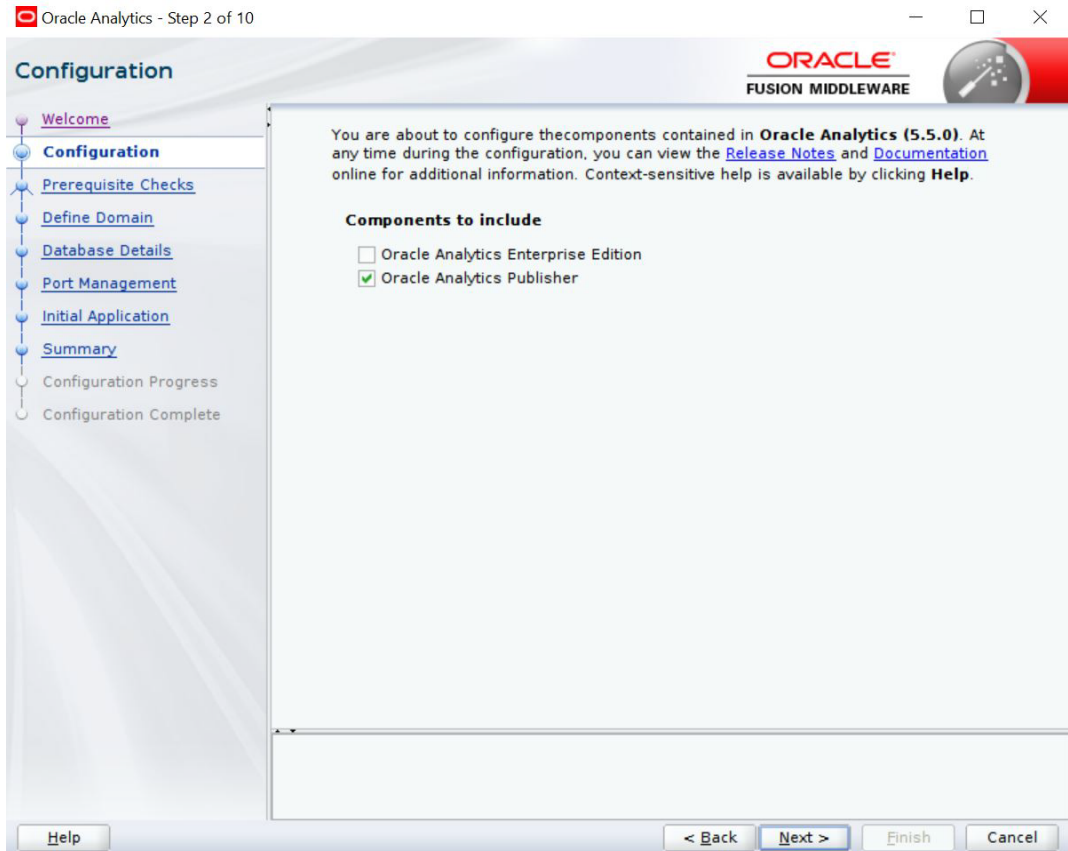
After installing OA Publisher, the next step is to configure OA Publisher.

### To configure OA Publisher

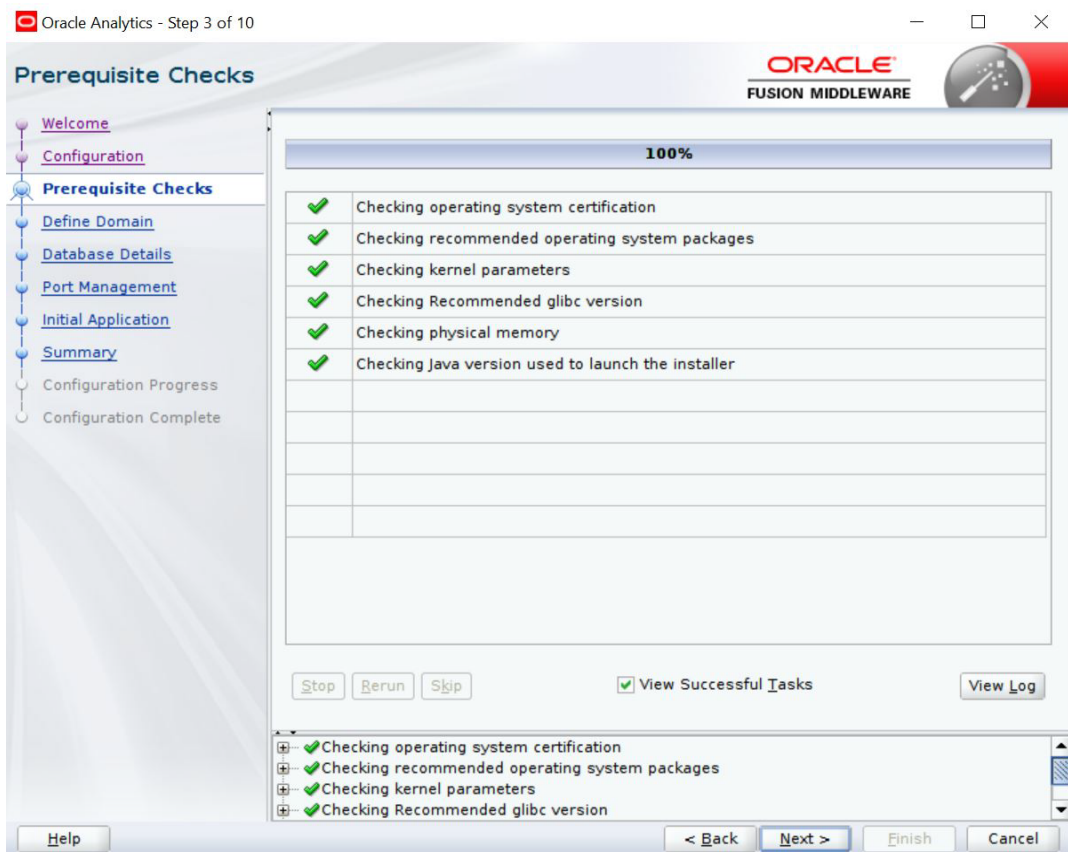
1. Launch configuration window and browse to \$BI\_HOME/bin (for example, BI\_HOME is /u01/Middleware/Weblogic12cHome/bi).
2. Run ./config.sh. The following window is displayed.



3. Select the option 'Oracle Analytics Publisher' and Click 'Next'.



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



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

Oracle Analytics - Step 4 of 10

**Define Domain**

Welcome  
Configuration  
Prerequisite Checks  
**Define Domain**  
Database Details  
Port Management  
Initial Application  
Summary  
Configuration Progress  
Configuration Complete

The domain is the basic unit of WebLogic administration. All Oracle Analytics components reside in one domain. The domain needs a place to store files, and initial administrator credentials.

The domain files include configuration files, log files, and data files.

The credentials define the initial administrator account. For security reasons no other default accounts are created. Use this initial account to create individual accounts for your users.

**Location of new domain**

Domains Directory: /u01/Middleware/Weblogic12cHome/user\_projects/domains

Domain Name: bi

Domain Home: /u01/Middleware/Weblogic12cHome/user\_projects/domains/bi

**Credentials for new domain**

Username: weblogic

Password: .....

Confirm Password: .....

Enter a password for the System Administrator.  
The password must be a minimum of 8 and not exceed 30 alphanumeric characters. It must begin with an alphabetic character, use only alphanumeric, underscore (\_), dollar (\$) or pound (#) characters and include at least 1 digit.

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.

Oracle Analytics - Step 5 of 10

### Database Schema

ORACLE FUSION MIDDLEWARE

Welcome  
Configuration  
Prerequisite Checks  
Define Domain  
**Database Details**  
Port Management  
Initial Application  
Summary  
Configuration Progress  
Configuration Complete

Database schemas are required for storage of internal housekeeping information. These schemas are distinct from any data sources which you plan to analyse in Oracle Analytics.

The simplest option is to create new database schemas here. Alternatively you can use existing schemas you created earlier using the Repository Creation utility (RCU). Using RCU in advance gives you additional options, such as choosing tablespaces. RCU is available in directory /u01/Middleware/Weblogic12cHome/oracle\_common/bin.

Create new schemas

Schema prefix: OFSLL  
Schema password: \*\*\*\*\*  
Confirm schema password: \*\*\*\*\*  
Database type: Oracle Database  
Username: sys  
Password: \*\*\*\*\*  
Simple connect string: ofssl.oracle.com:1521:OLLMDR

Use existing schemas

Help < Back Next > Finish Cancel

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

Oracle Analytics - Step 6 of 10

### Port Management

ORACLE FUSION MIDDLEWARE

Welcome  
Configuration  
Prerequisite Checks  
Define Domain  
Database Details  
**Port Management**  
Initial Application  
Summary  
Configuration Progress  
Configuration Complete

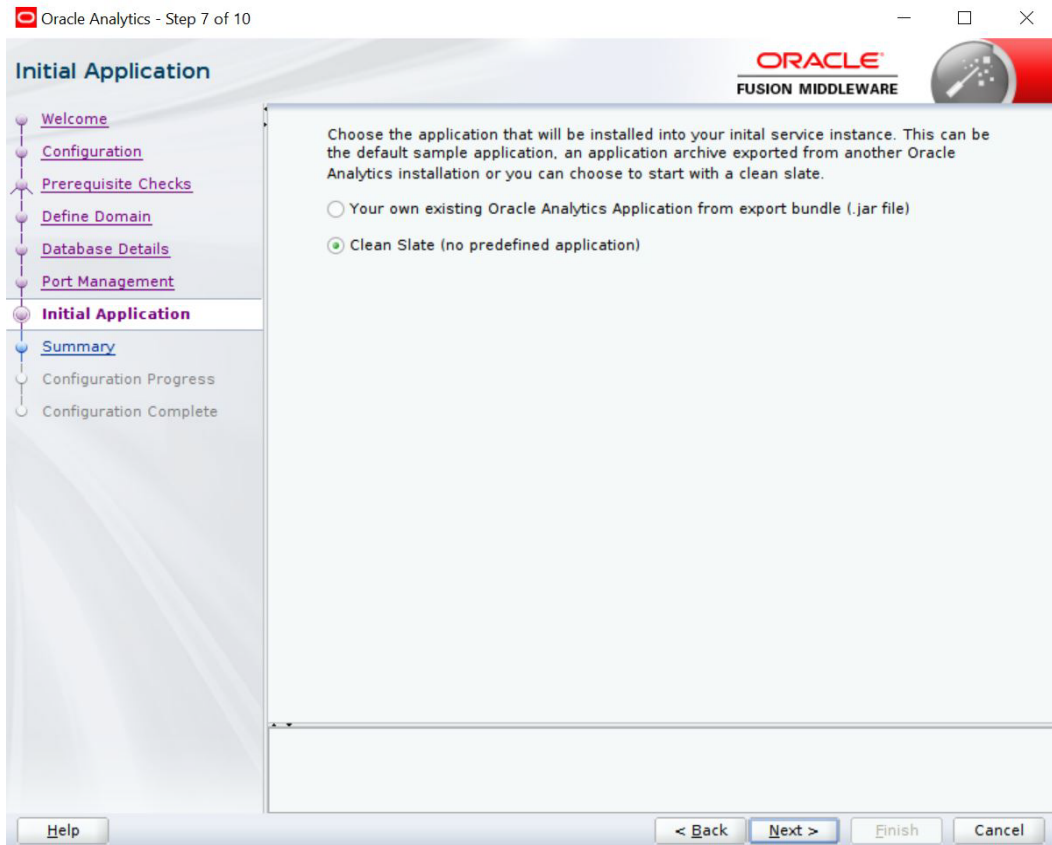
Choose the ports for Oracle Analytics and WLS processes to use.

**Port Range**

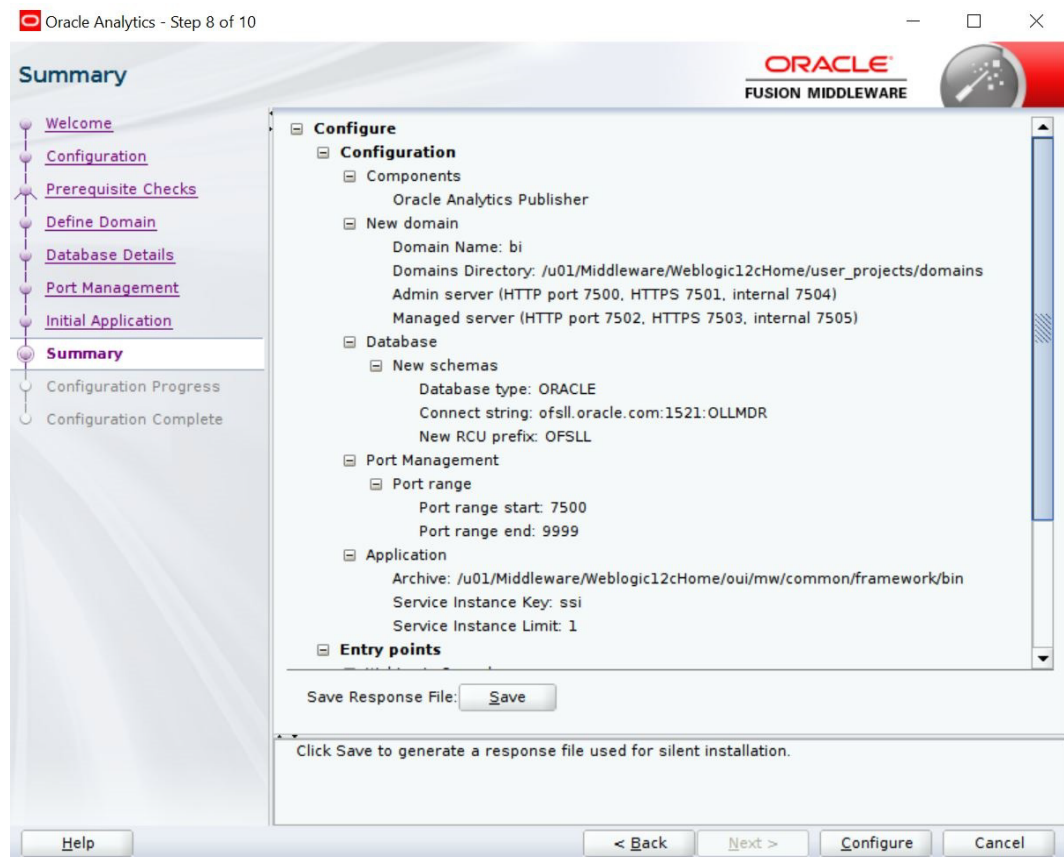
Port Range Starting Port: 7500  
Port Range End Port: 9999

Help < Back Next > Finish Cancel

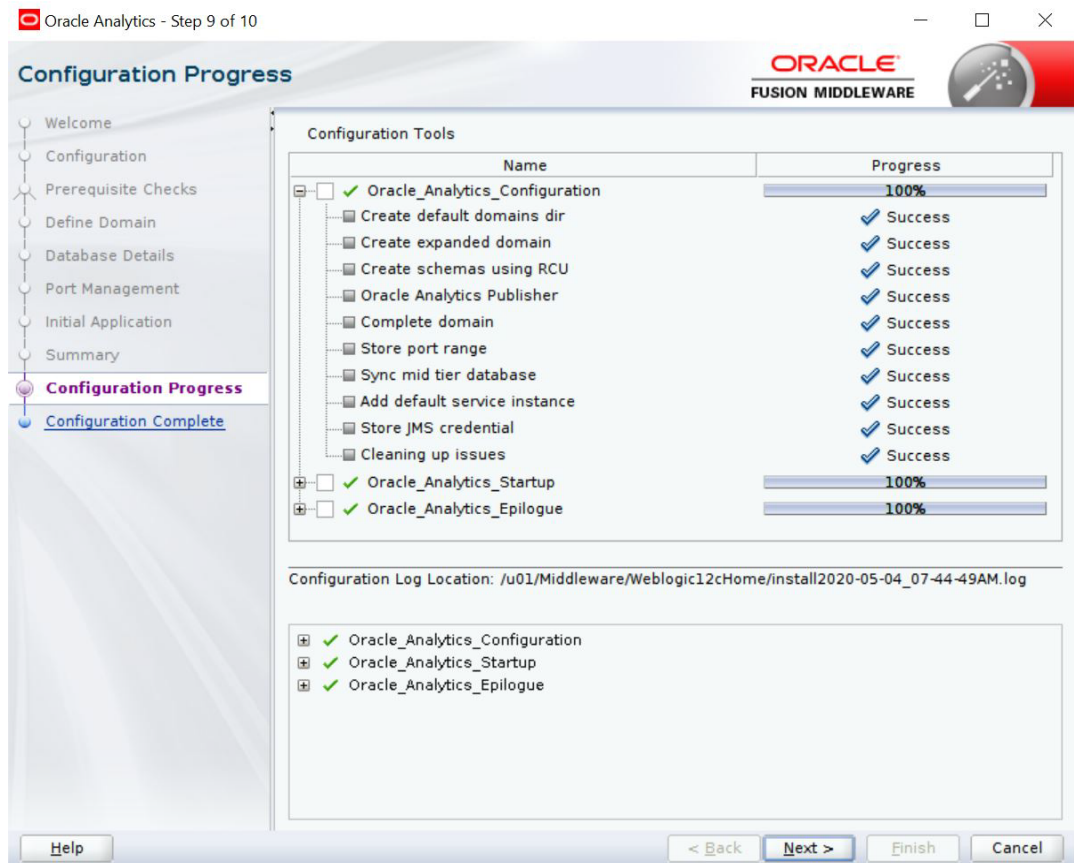
9. Click 'Next'. The following window is displayed.



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



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 OA Publisher with the details as highlighted in the above screen.

### 3.1 Verifying Successful OA Publisher Deployment

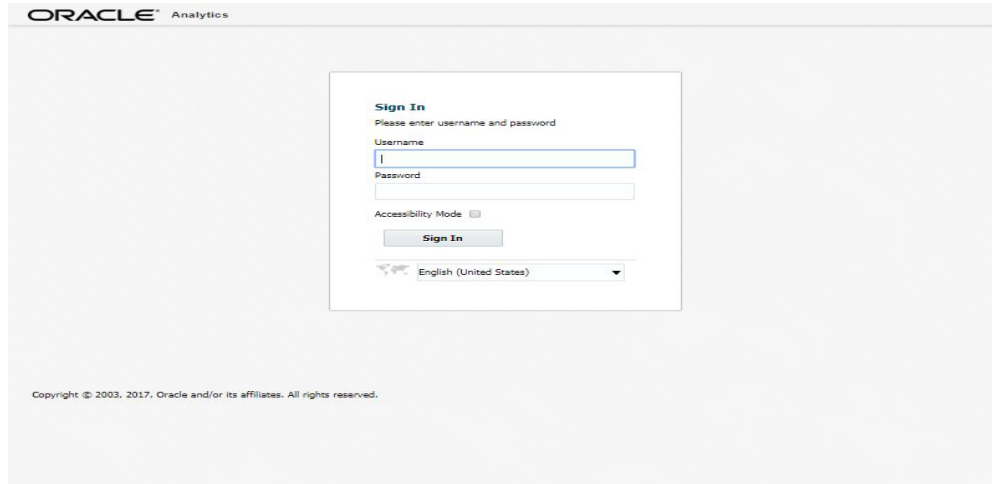
Successful OA Publisher deployment can be verified by launching the OA Publisher URL <http://hostname:<port>/xmlpserver>.



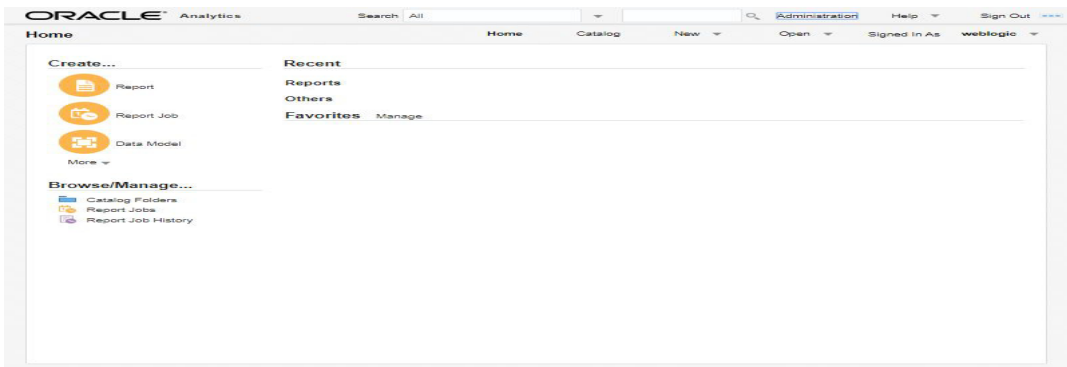
## 4. Creating OA Publisher Datasource

To create OA Publisher Datasource, do the following:

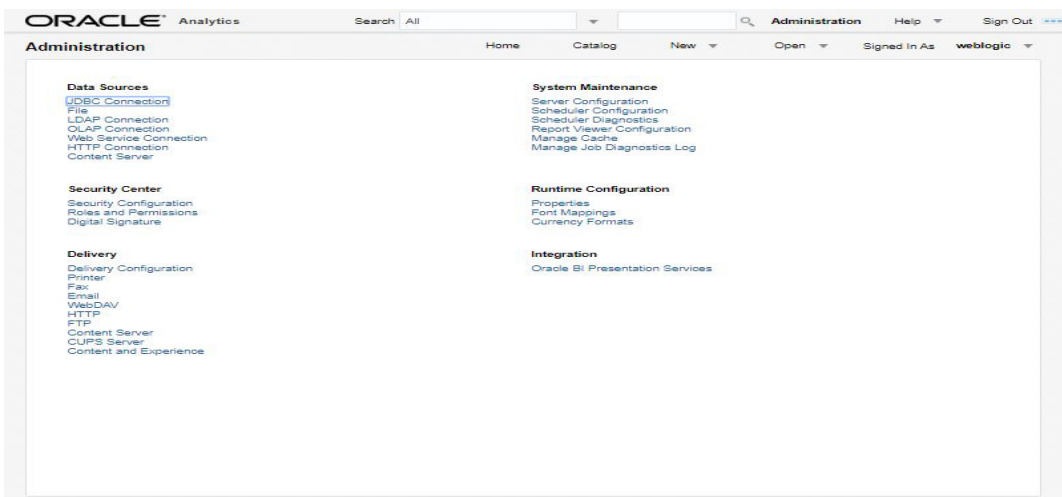
1. Access the console URL using `http://hostname:<port>/xmlserver`.



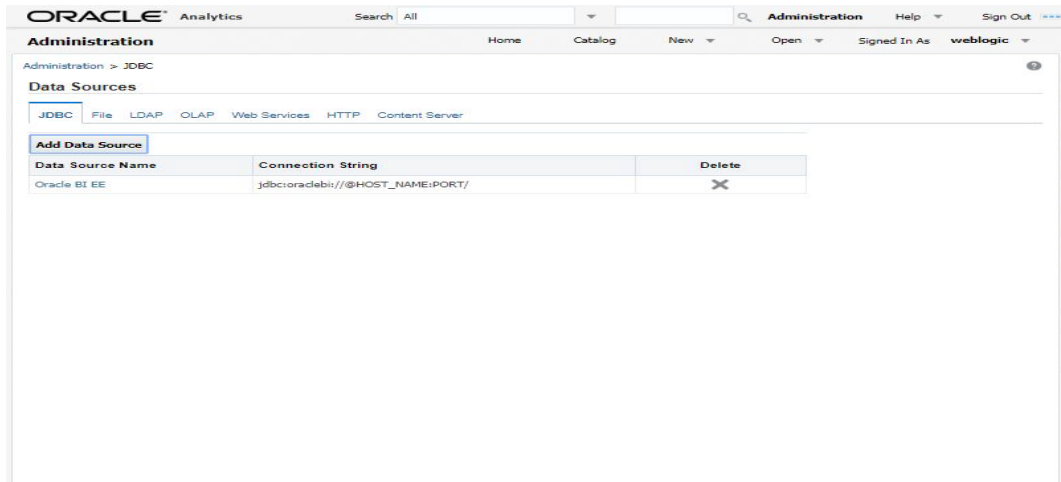
2. The following window is displayed. Click Administration option on the header.



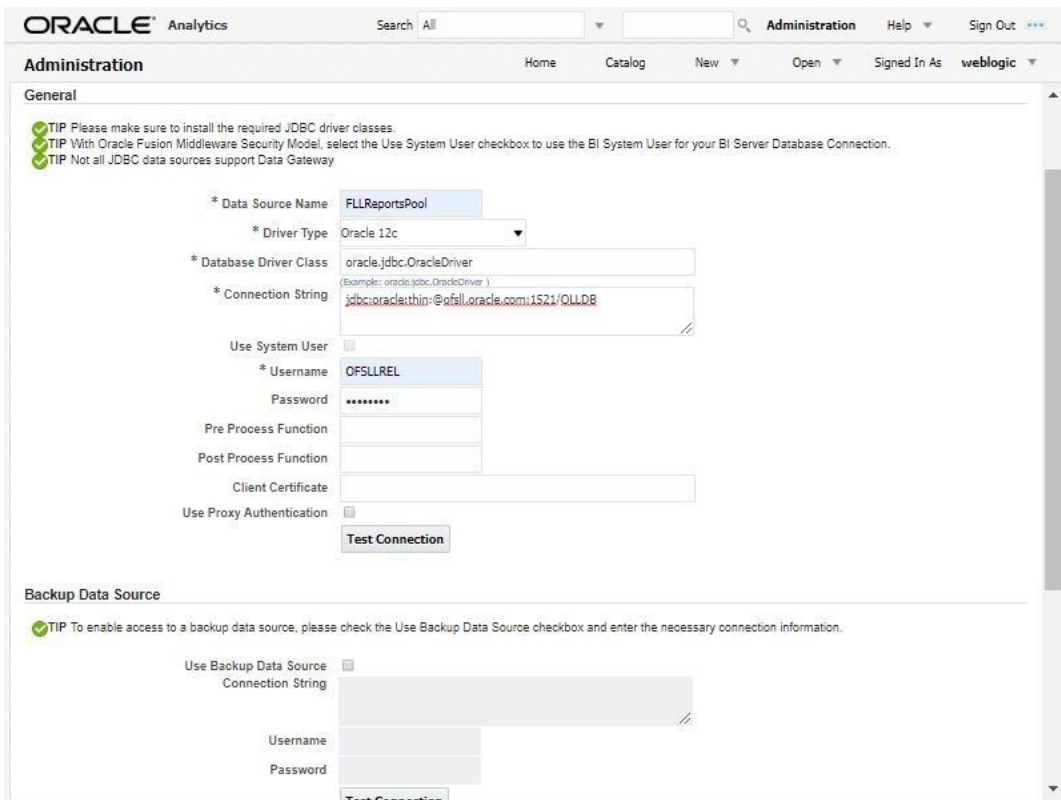
3. Click on 'JDBC Connection'.



4. Click 'Add Data Source'.



5. Add the following details:



- Specify Data Source Name as 'FLLReportsPool'.
- Click on 'Test Connection'.
- Under 'Security' section, select 'BI Author Role' and 'BI Consumer Role' from Available Roles and assign them as Allowed Roles.

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#### 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.

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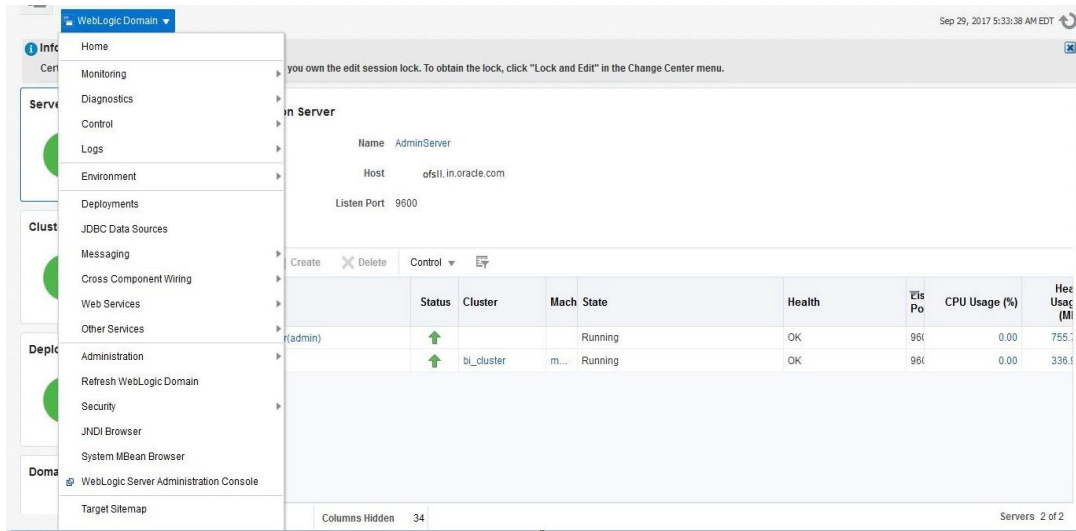
6. Click 'Apply'.

## 4.1 Creating Roles

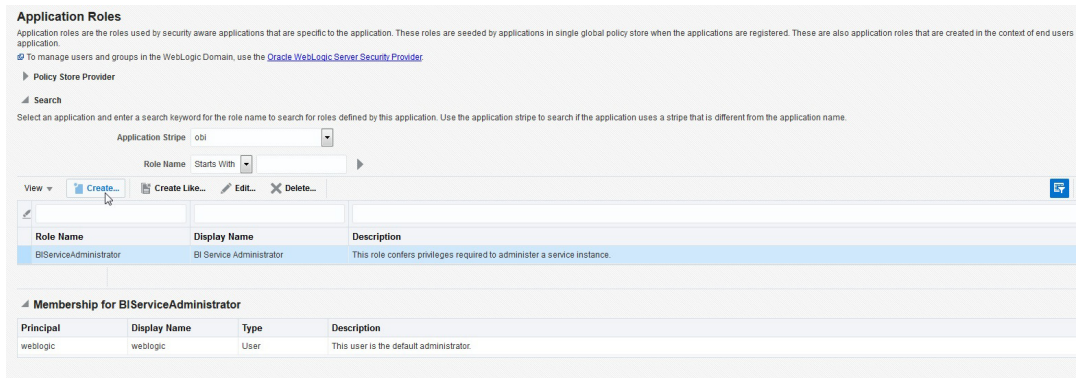
The following section details the steps to be followed to create “BI Author” and “BI Consumer” roles which are used to define security roles while creating Data Source on OA Publisher.

### 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.



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



4. Specify the following details:

- Role Name
- Display Name
- Description



- 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**  
Role (or Enterprise Role) is the group of users designed at the enterprise level and typically used to assign a privilege or permission. A role can also contain other roles as members.

**General**

**Add Principal**  
Specify criteria to search and select the application roles that you want to grant permissions to.

**Search**  
Type: User  
Principal Name: Starts With  
Display Name: Starts With

**Searched Principals**

Principal	Display Name	Description
LCMUser		This is the default service account for WebLogic Server Lifecycle Manager configuration updates.
OracleSystemUser		Oracle application software system user.
weblogic		This user is the default administrator.

**Advanced Option**  
 Check to enter principal name here instead of searching from above. This option can be used for advanced scenarios related to custom authenticators.

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

**Create Application Role**  
Role (or Enterprise Role) is the group of users designed at the enterprise level and typically used to assign a privilege or permission. A role can also contain other roles as members.

**General**

Application Stripe: obi  
Role Name: BIConsumer  
Display Name: BIConsumer  
Description: The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher.

**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.

Name	Display Name	Type
weblogic		User

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

**Application Roles**  
Application roles are the roles used by security aware applications that are specific 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 the application.

Policy Store Provider

**Search**  
Select an application and enter a search keyword for the role name to search for roles defined by this 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

Role Name	Display Name	Description
BIServiceAdministrator	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.

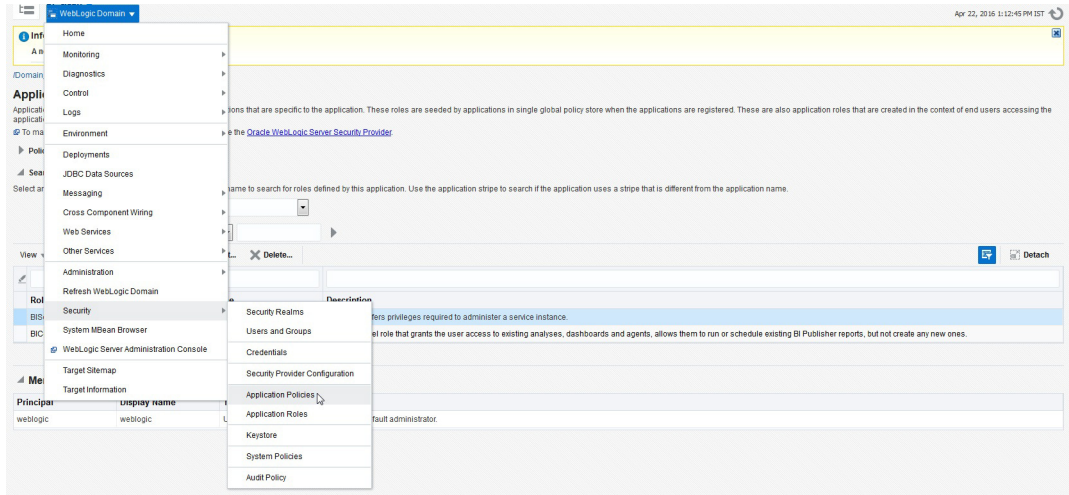
**Membership for BIServiceAdministrator**

Principal	Display Name	Type	Description
weblogic	weblogic	User	This user is the default administrator.

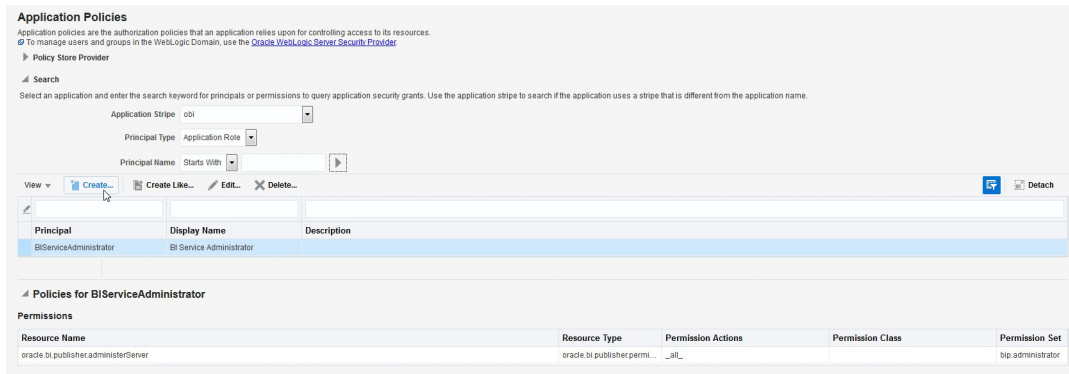
## To Create WebLogic Application Policies

- Login to Enterprise Manager using the URL - http://hostname:port/em.

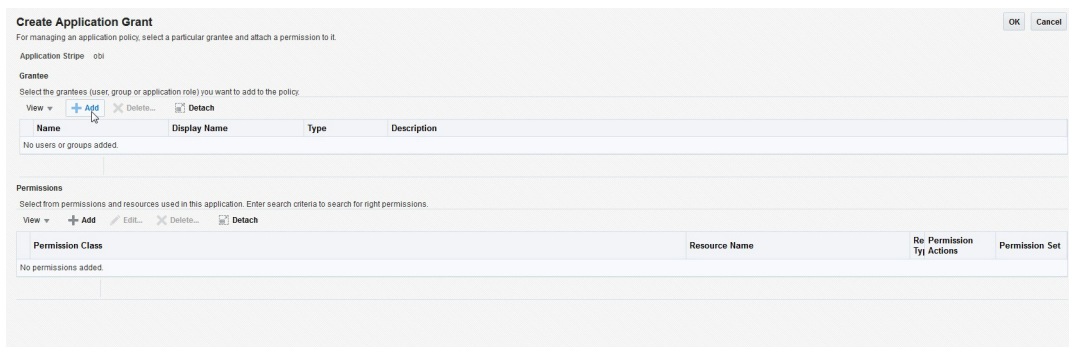
2. Select Weblogic Domain > Security > Application Policies as indicated in the following screen:



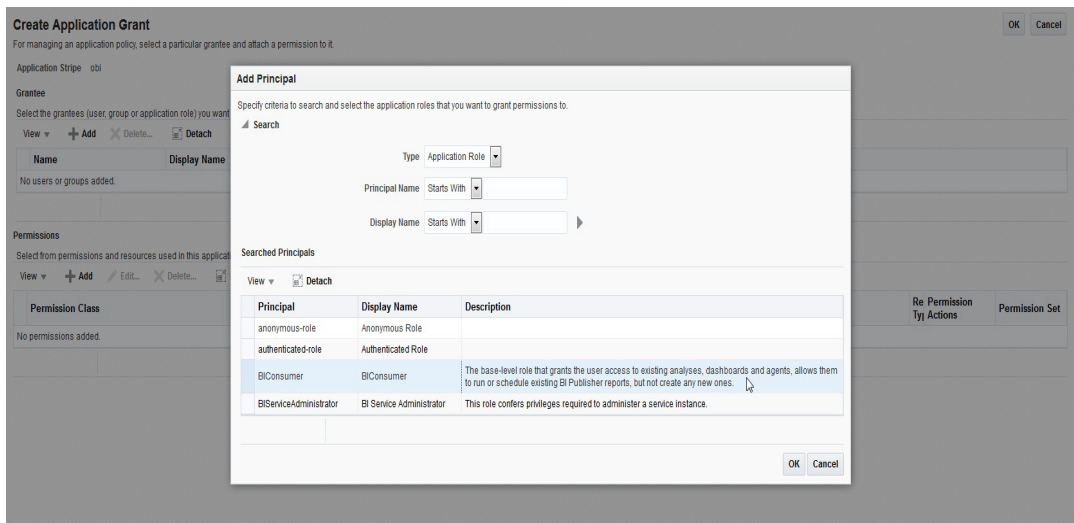
3. In the Application Stripe field, select 'obi' from the drop-down list. Click 'Create'.



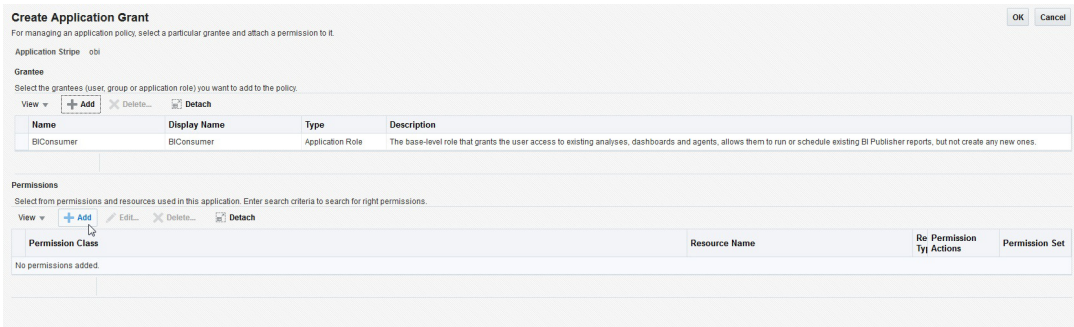
4. In 'Create Application Grant' screen, under the Grantee section, click 'Add'.



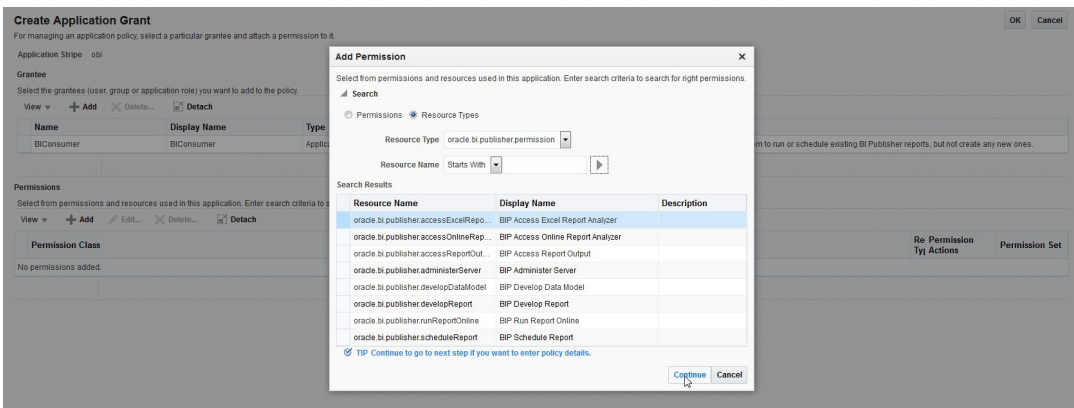
- Select the newly created application role from the list and click 'OK'. The new role is added to the list.



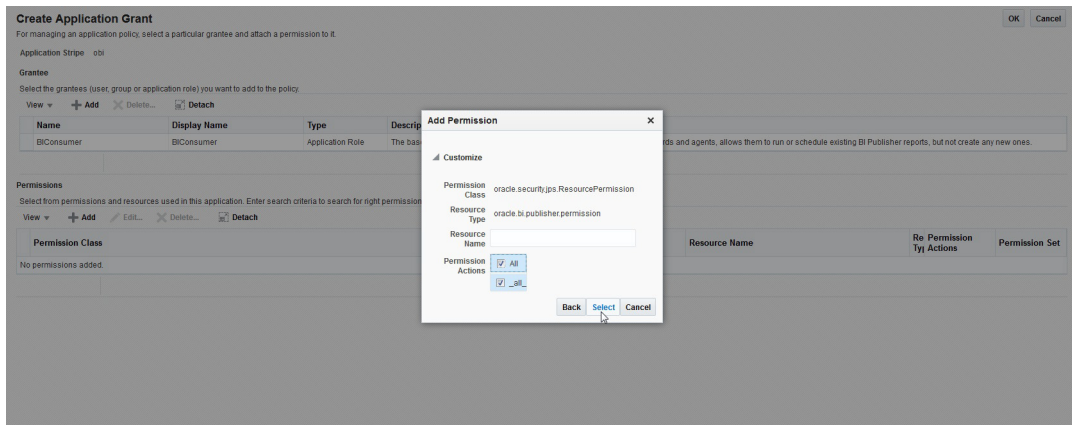
- In the 'Permissions' section, click 'Add'.



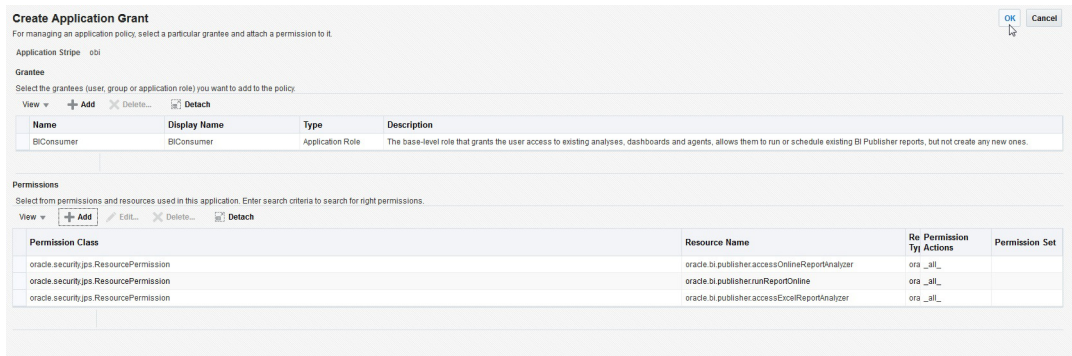
- In the search criteria, select 'Resource Type' and select the resource type from the drop-down list. Select the required resource from the search results and click 'Continue'.



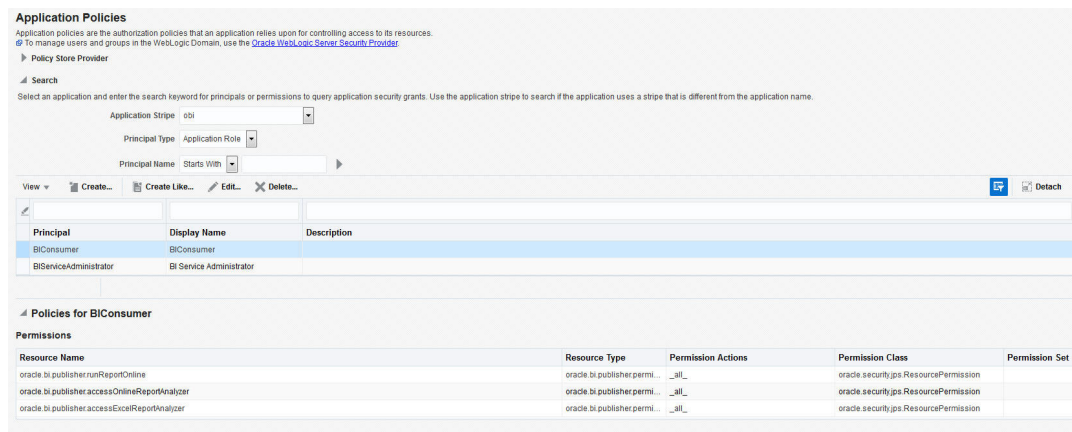
- Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click 'Select'.



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



- Once done, click 'OK'.

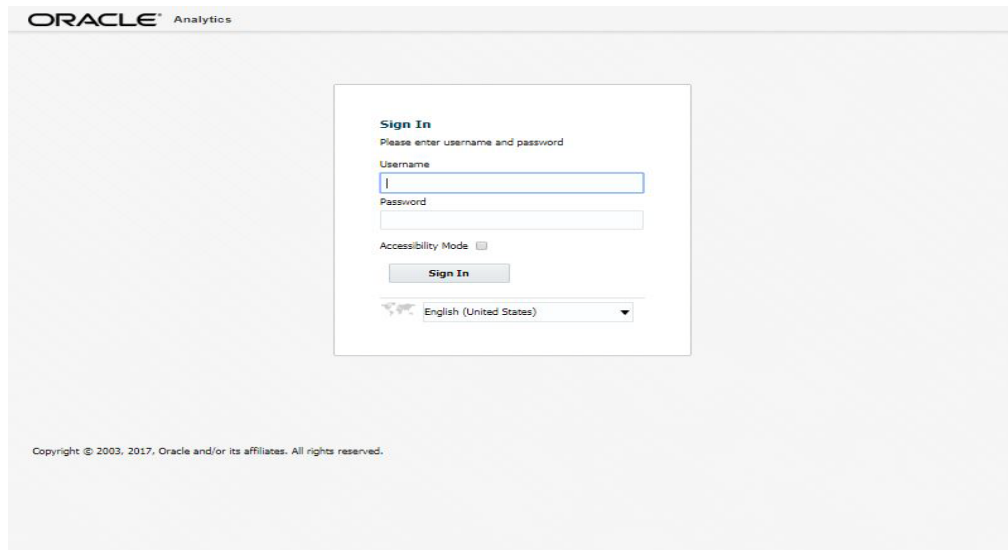


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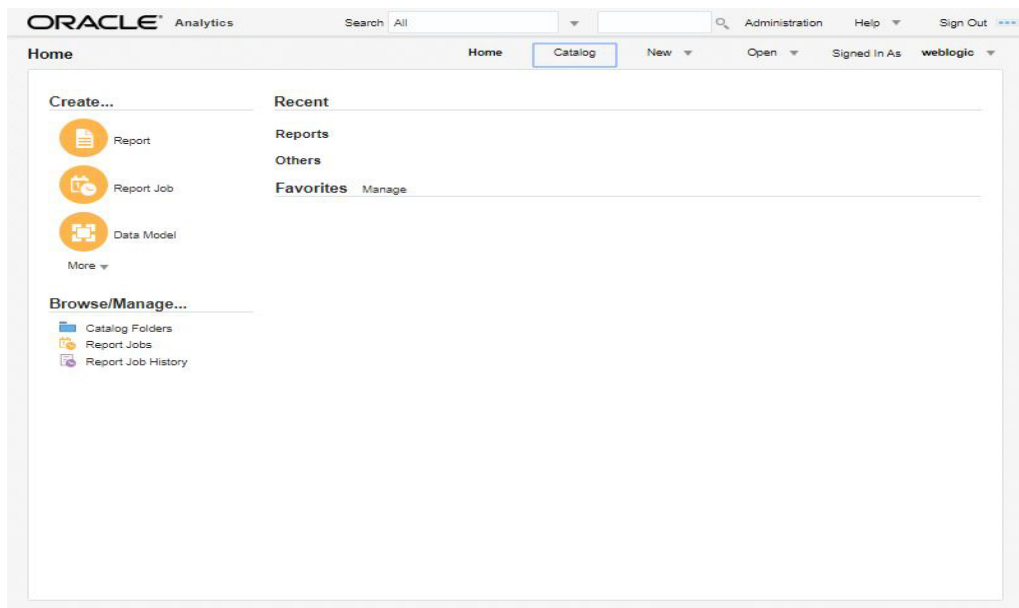
## 5. Importing Reports to OA Publisher Server

To import ofsl application reports to OA Publisher Server, do the following:

1. Copy and extract the OFSLLReports.zip file to staging area.
2. Launch the Oracle Analytics Publisher Application using `http://hostname:port/xmlpserver`
3. Login with valid credentials.

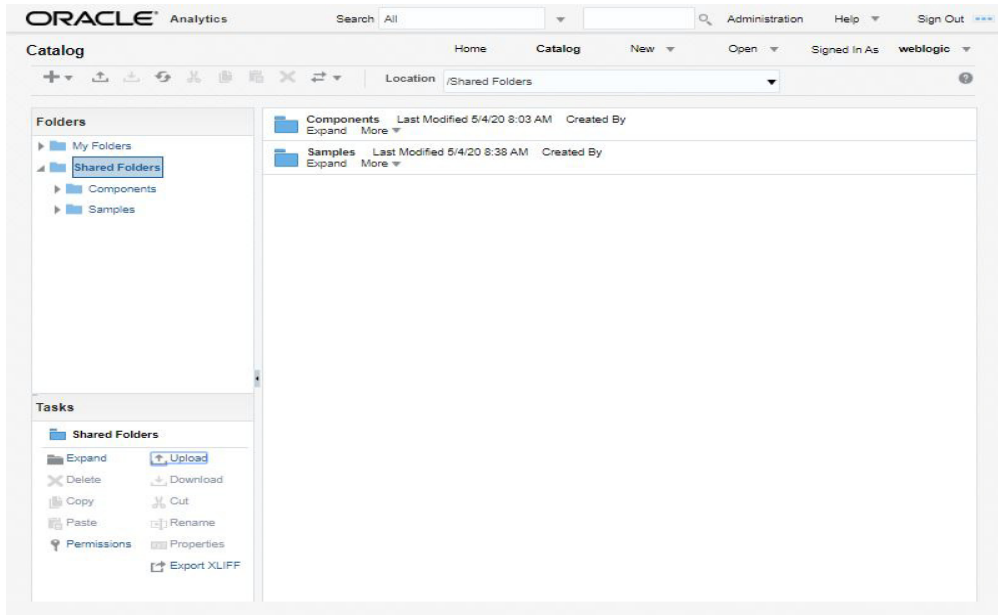


4. Following window is displayed. Click on 'Catalog Folders' on the left pane.

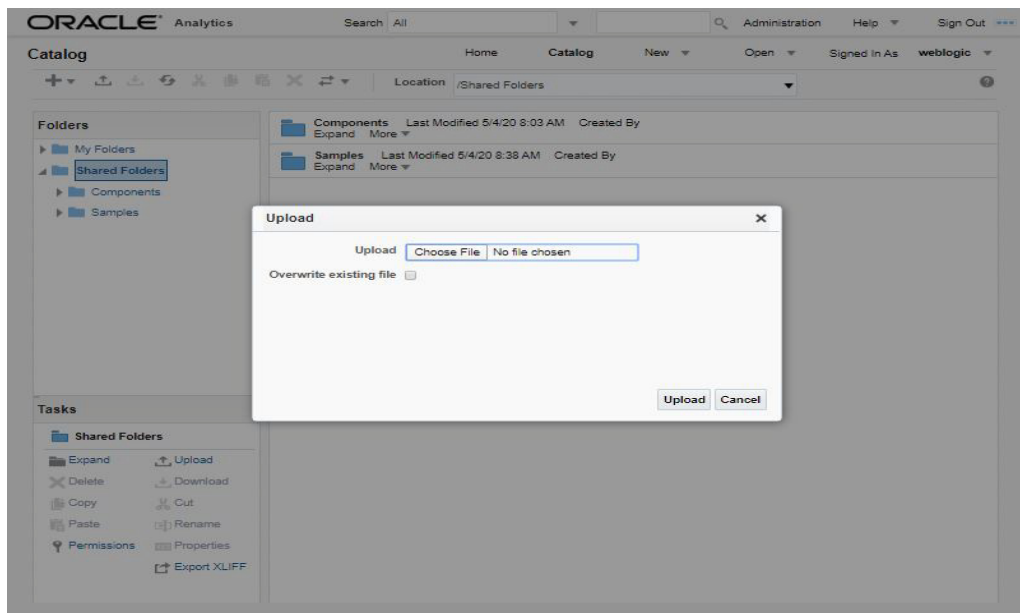




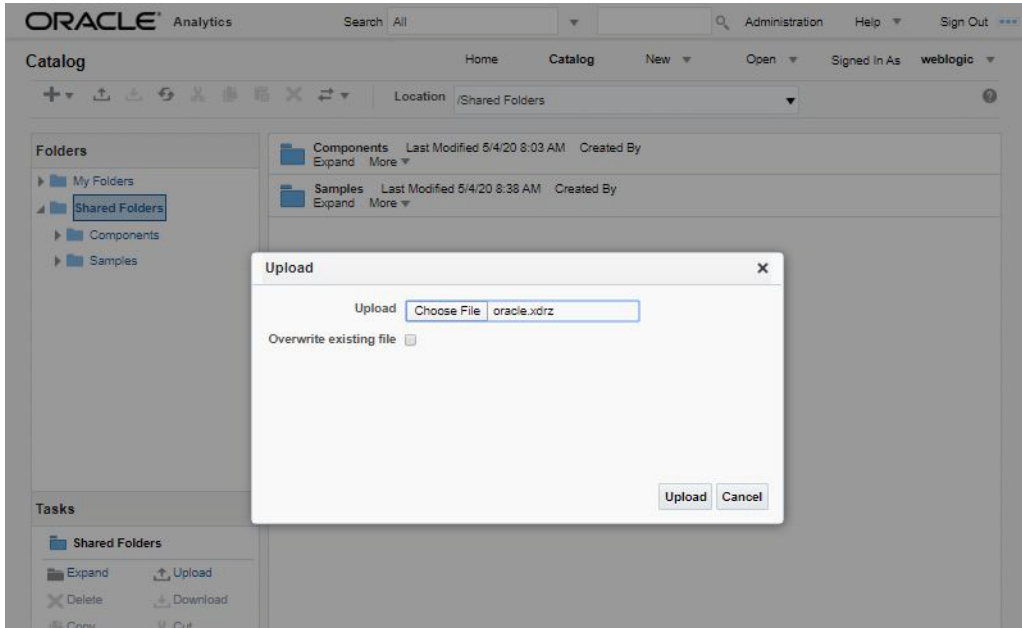
5. Click on 'Shared Folders' option and then click 'Upload'.



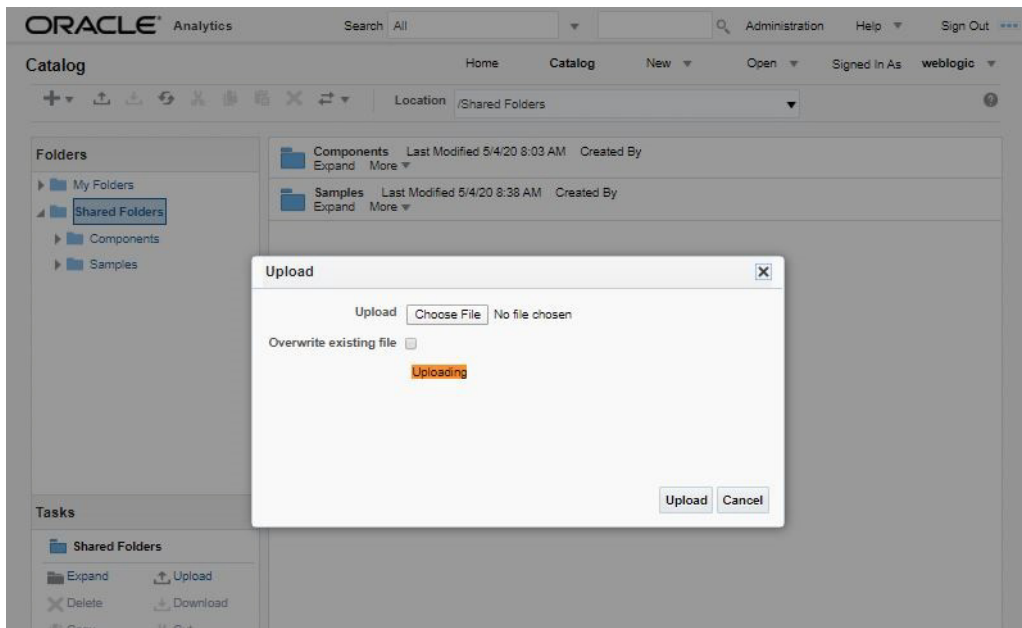
6. The following window is displayed. Browse to the location where the oracle.xrdrz file is saved. Click the 'Overwrite Existing File' check box if you are overwriting an existing directory.



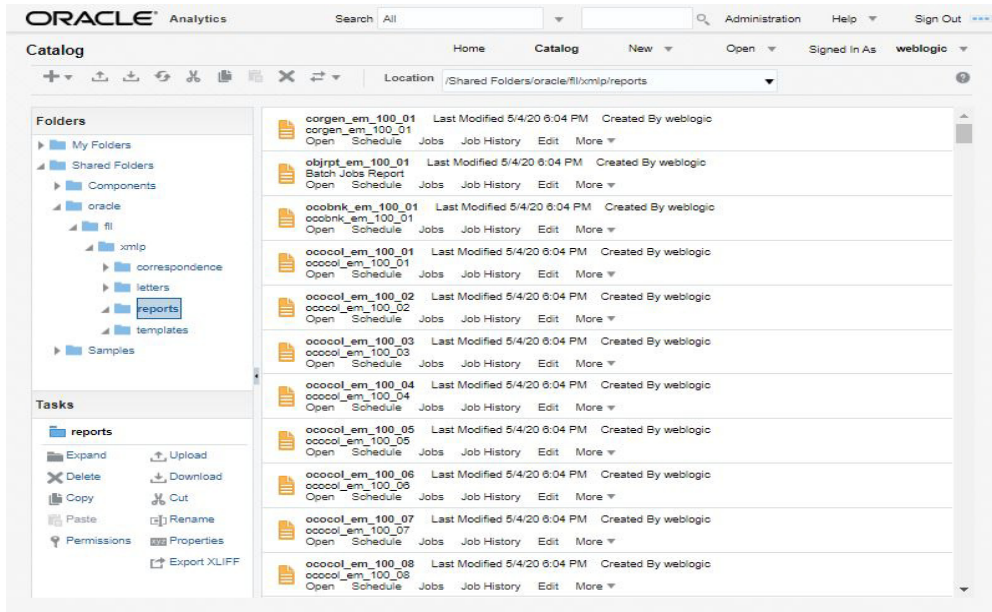
7. Click on 'Upload'.



8. The following window is displayed.



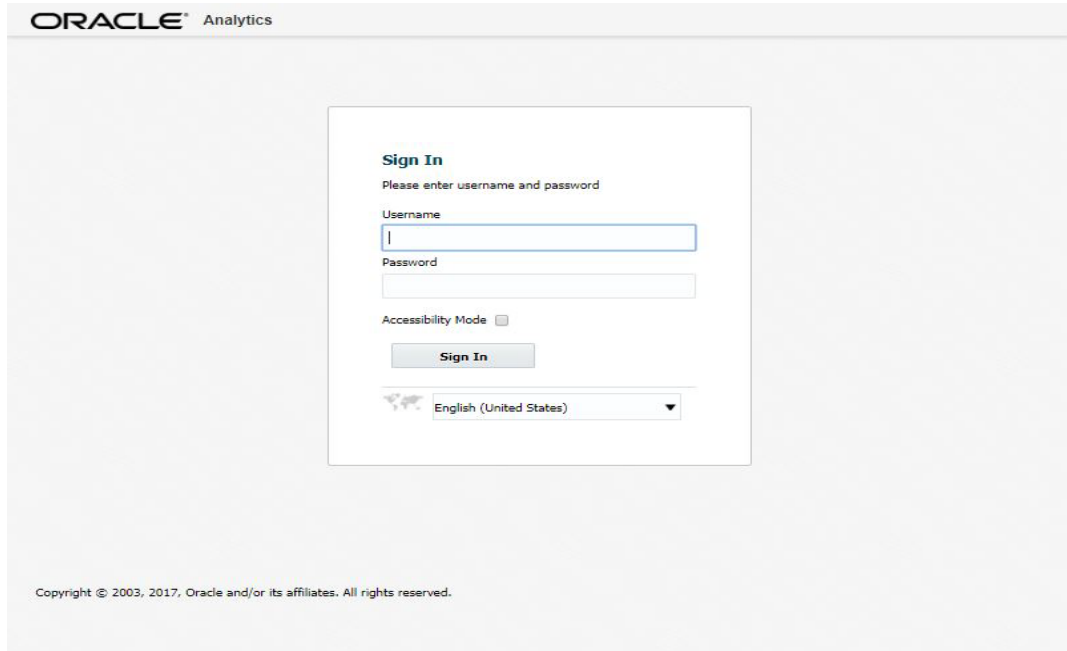
9. Once the upload is completed, click any folder to see the list of reports under the directory. The following window is displayed.



## 6. Configure MDB Mail Server

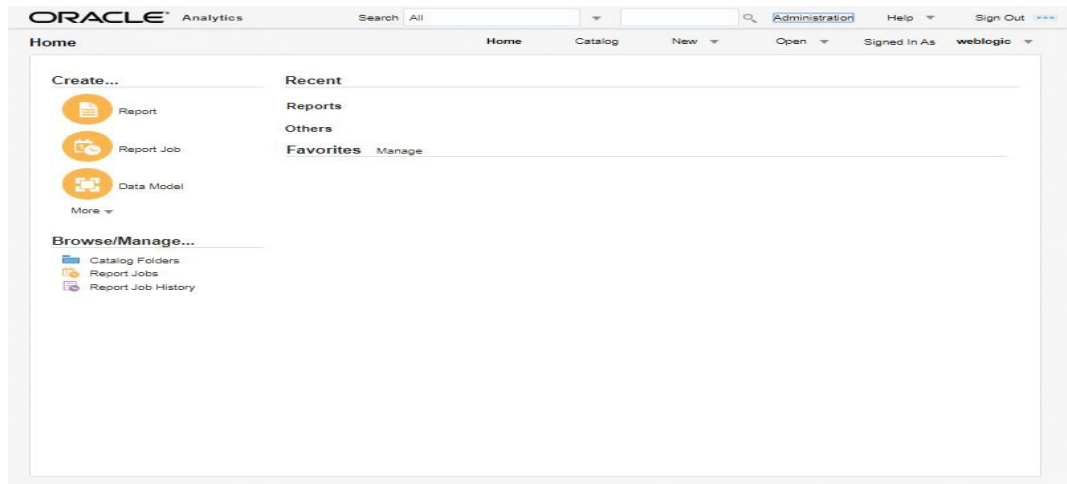
Refer to the following instructions to configure the MDB email server. This is required for outbound email communications.

1. Launch the Oracle Analytics Publisher application (<http://hostname:port/xmlpserver>). The following window is displayed.



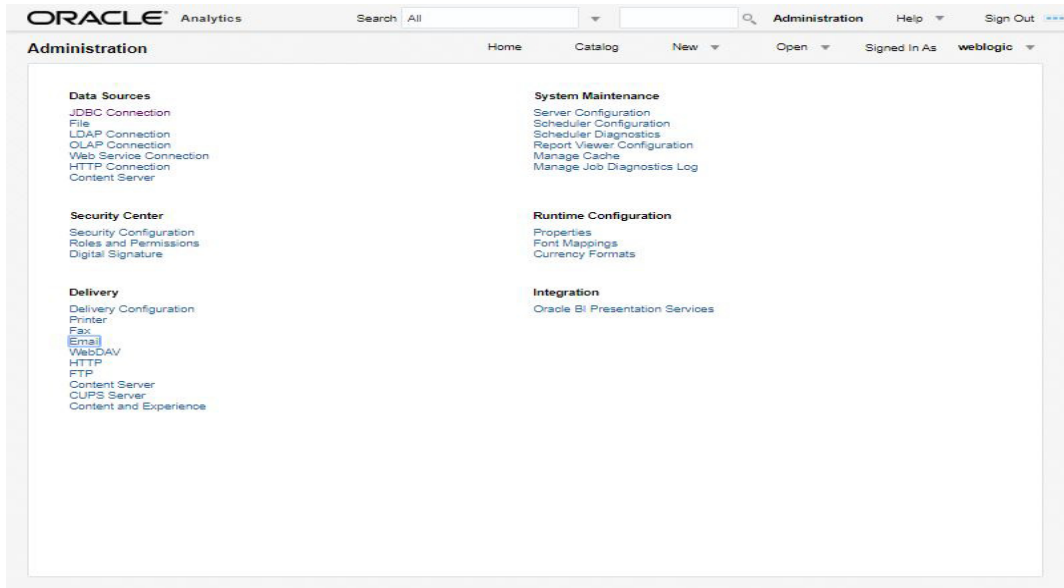
The screenshot shows the Oracle Analytics Publisher Sign In page. The page has a light gray background with the Oracle Analytics logo at the top left. In the center, there is a white box containing the sign-in form. The form includes a title "Sign In", a prompt "Please enter username and password", and two input fields for "Username" and "Password". Below these fields is a checkbox for "Accessibility Mode" and a "Sign In" button. At the bottom of the form is a language dropdown menu set to "English (United States)". At the bottom of the page, there is a copyright notice: "Copyright © 2003, 2017, Oracle and/or its affiliates. All rights reserved."

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

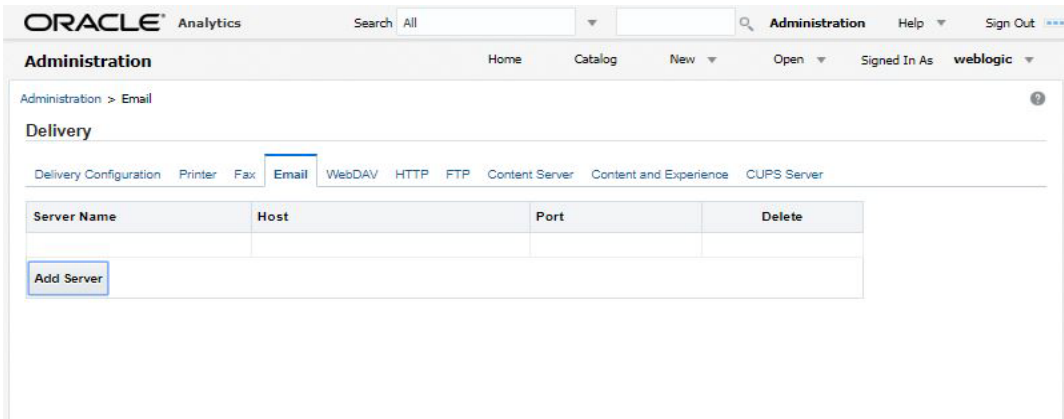


The screenshot shows the Oracle Analytics Publisher Home page after a successful login. The page has a light gray background with the Oracle Analytics logo at the top left. The top navigation bar includes a search bar, a "Home" button, a "Catalog" button, a "New" button, an "Open" button, and a "Signed In As" dropdown menu showing "weblogic". The main content area is divided into three sections: "Create...", "Recent", and "Browse/Manage...". The "Create..." section has three orange circular icons for "Report", "Report Job", and "Data Model", with a "More" link below. The "Recent" section has a "Reports" section and an "Others" section. The "Browse/Manage..." section has three blue folder icons for "Catalog Folders", "Report Jobs", and "Report Job History".

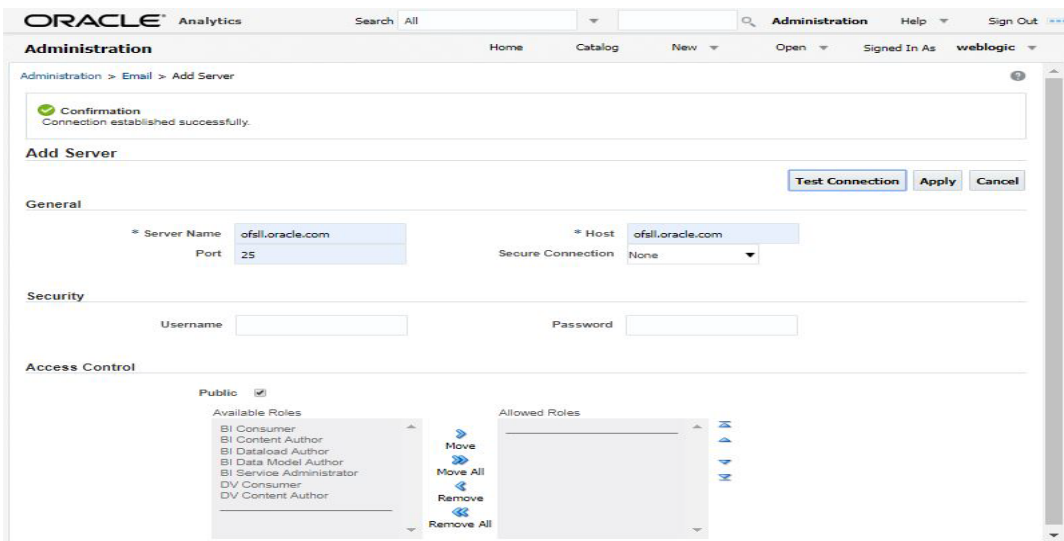
3. Click 'Administration'. The following window is displayed.



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

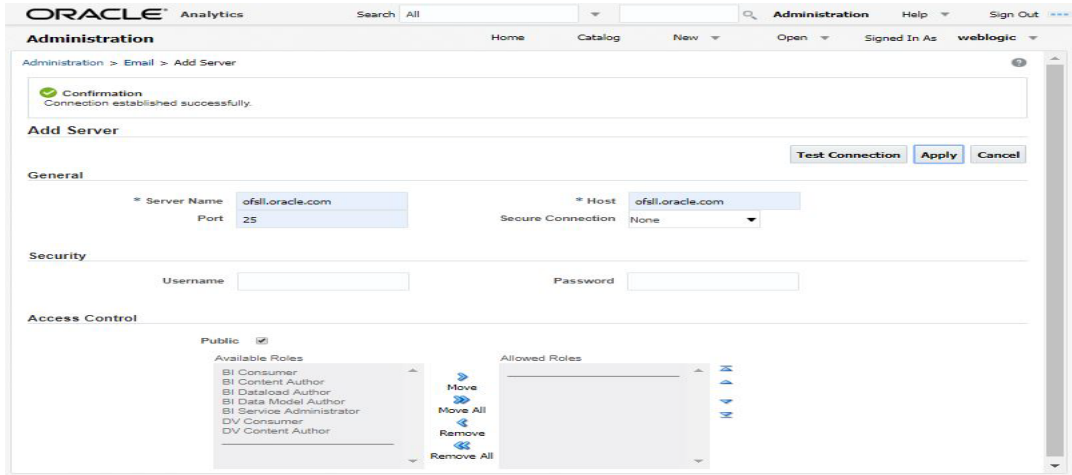


5. Click 'Add Server'. The following window is displayed.



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

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



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

