

Oracle Financial Services Data Governance for US Regulatory Reporting

Installation and Configuration Guide

Release 8.1.0.0.0

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Oracle Financial Services Data Governance for US Regulatory Reporting Installation and Configuration Guide

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Document Control

Table 1: Document Version Control

Version Number	Revision Date	Change Log
1.0	March-2021	Created the document with instructions for the installation of the Oracle Financial Services Data Governance for US Regulatory Reporting Release 8.1.0.0.0.

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1 Preface

This section provides supporting information for the Oracle Financial Services Data Governance for US Regulatory Reporting (OFS DGUSRR) Application Installation Guide.

You can find the latest copy of this document in the [OHC Documentation 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 [Oracle Support](#) with the required login credentials to quickly notify us of any issues at any stage.

1.1 Audience

The OFS DGUSRR Installation Guide is intended for administrators, business users, strategists, data analysts, and implementation consultants who are responsible for installing and maintaining the Application components.

This document assumes that you have experience installing Enterprise components and basic knowledge of the following:

- Oracle Financial Services Data Governance for US Regulatory Reporting Application components
- OFSAA architecture
- UNIX commands
- Database concepts
- Web server or web application server

1.2 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.

1.3 Related Documents

We strive to keep this and all other related documents updated regularly; visit the [OHC Documentation Library](#) to download the latest version available there. The list of related documents is provided here.

- [OHC Documentation Library](#) for **OFS Data Governance**:
 - *Oracle Financial Services Data Governance for US Regulatory Reporting User Guide Release*
 - *Oracle Financial Services Data Governance for US Regulatory Reporting Security Guide*
 - *Oracle Financial Services Data Governance for US Regulatory Reporting Cloning Guide*
- [OHC Documentation Library](#) for **OFS AAI Application**:
 - *OFS Advanced Analytical Applications Infrastructure (OFS AAI) Application Installation and Configuration Guide*

- *OFS Analytical Applications Infrastructure User Guide*
- *OFS Analytical Applications Infrastructure Administration Guide*
- *Oracle Financial Services Analytical Applications Infrastructure Environment Check Utility Guide*
- **Additional documents:**
 - [OFSAA Licensing User Manual, Release 8.1.0.0.0](#)
 - [OFS DGUSRR Cloning Guide Release 8.0.x](#)
 - [OFS DGUSRR Cloning Guide Release 8.1.x](#)
 - [OFS Analytical Applications Infrastructure Security Guide](#)
 - [OFSAAI FAQ Document](#)
 - [OFS Analytical Applications 8.1.0.0.0 Technology Matrix](#)
 - [Oracle Financial Services Analytical Applications Infrastructure Cloning Guide](#)

1.4 Conventions

The following text conventions are used in this document.

Table 2: Document Conventions

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
<i>Italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
Monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, file names, text that appears on the screen, or text that you enter.
Hyperlink	Hyperlink type indicates the links to external websites and internal document links.

1.5 Abbreviations

The following table lists the abbreviations used in this document.

Table 3: Abbreviations

Abbreviation	Meaning
AIX	Advanced Interactive executive
DEFQ	Data Entry Forms and Queries
DML	Data Manipulation Language

Abbreviation	Meaning
EAR	Enterprise Archive
EJB	Enterprise JavaBean
ERM	Enterprise Resource Management
FTP	File Transfer Protocol
GUI	Graphical User Interface
HTTPS	Hypertext Transfer Protocol Secure
J2C	J2EE Connector
J2EE	Java 2 Enterprise Edition
JDBC	Java Database Connectivity
JDK	Java Development Kit
JNDI	Java Naming and Directory Interface
JRE	Java Runtime Environment
JVM	Java Virtual Machine
LDAP	Lightweight Directory Access Protocol
LHS	Left Hand Side
MOS	My Oracle Support
OFS	Oracle Financial Services
OFSAAI	Oracle Financial Services Analytical Application Infrastructure OLAP
OSDC	Oracle Software Delivery Cloud
OS	Operating System
RAM	Random Access Memory
RDMS	Relational Database Management System
SFTP	Secure File Transfer Protocol
SID	System Identifier
SSL	Secure Sockets Layer
TNS	Transparent Network Substrate
URL	Uniform Resource Locator
VM	Virtual Machine
Web Archive	WAR
XML	Extensible Markup Language

Part I

Topics:

- [Pre-installation](#)
- [Installation](#)
- [Post-installation](#)

2 Introduction

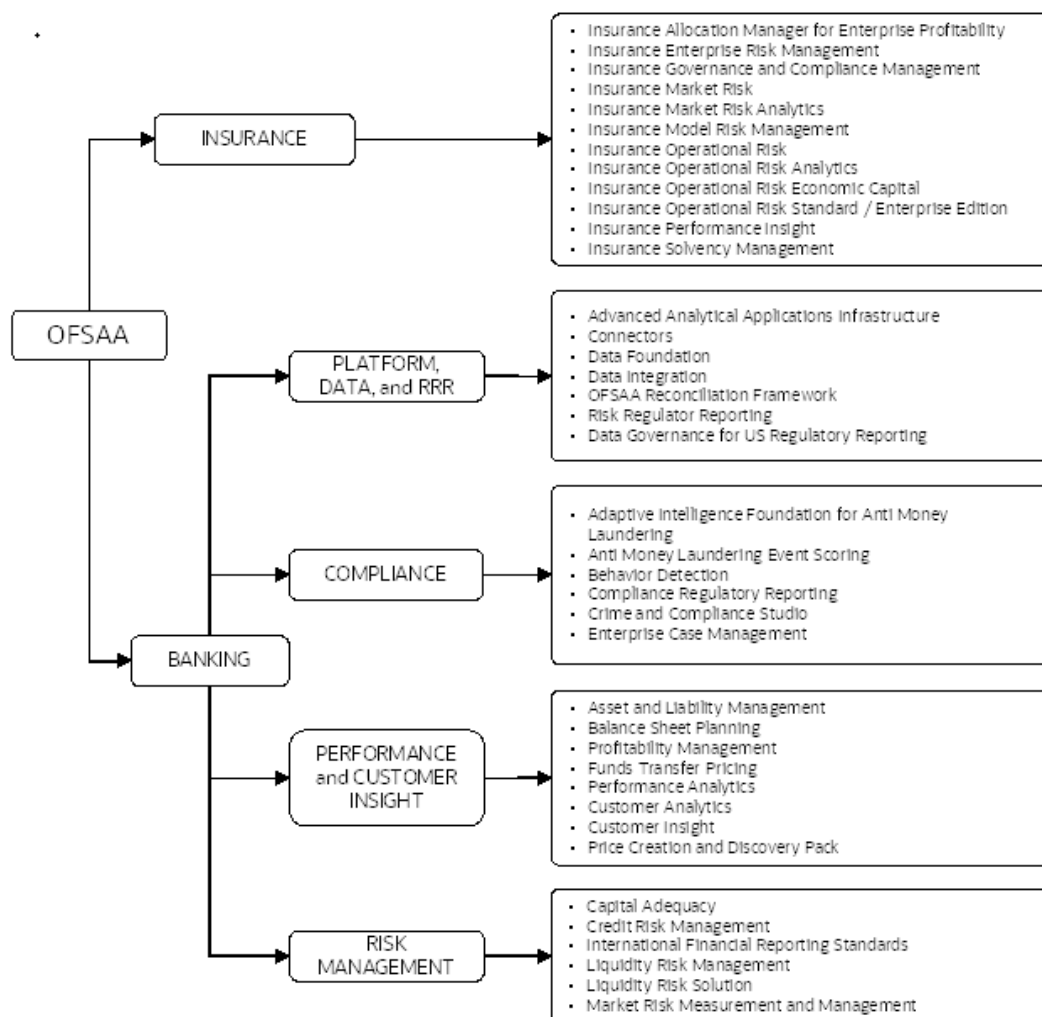
In today's turbulent markets, financial institutions require a better understanding of their risk-return, while strengthening competitive advantage and enhancing long-term customer value. Oracle Financial Services Analytical Applications (OFSAA) enable financial institutions to measure and meet risk-adjusted performance objectives, cultivate a risk management culture through transparency, lower the costs of compliance and regulation, and improve insight into customer behavior.

OFSAA uses industry-leading analytical methods, shared data models, and applications architecture to enable integrated risk management, performance management, customer insight, and compliance management. OFSAA actively incorporates risk into decision-making, enables to achieve a consistent view of performance, promotes a transparent risk management culture, and provides pervasive intelligence.

Oracle Financial Services Analytical Applications delivers a comprehensive, integrated suite of financial services analytical applications for both banking and insurance domains.

The following figure depicts the various Applications that are available across the OFSAA Banking and Insurance domains.

Figure 1: Applications of OFSAA



2.1 Oracle Financial Services Analytical Applications Infrastructure (OFS AAI)

Oracle Financial Services Analytical Applications Infrastructure (OFS AAI) powers the Oracle Financial Services Analytical Applications family of products to perform the processing, categorizing, selection, and manipulation of data and information required to analyze, understand and report on specific performance, risk, compliance, and customer insight issues by providing a strong foundation for the entire family of Oracle Financial Services Analytical Applications across the domains of Risk, Performance, Compliance and Customer Insight.

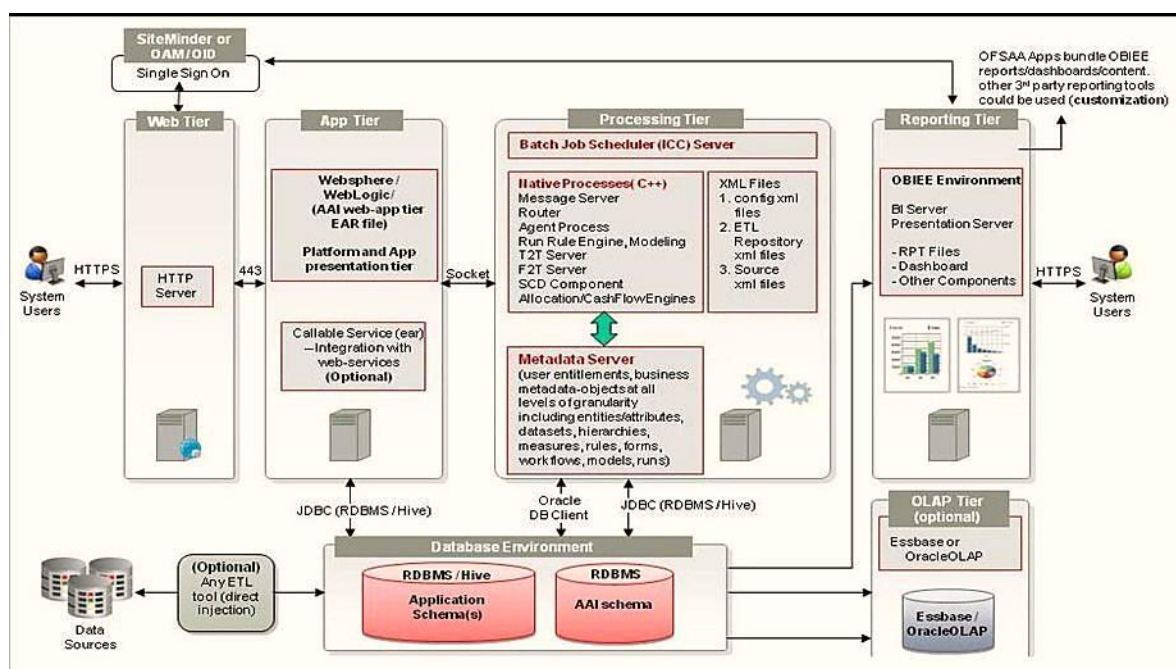
2.1.1 Components of OFSAA Infrastructure

The OFSAA Infrastructure includes frameworks that operate on and with the Oracle Financial Services Analytical Applications Data Model and forms the array of components within the Infrastructure.

The OFSAA Infrastructure components/frameworks are installed as two layers. Primarily, the metadata server and Infrastructure services run on one layer, while the UI and presentation logic run on the other. The UI and presentation layer is deployed on any of the supported J2EE Servers.

The following figure depicts the various frameworks and capabilities that make up the OFSAA Infrastructure.

Figure 2: Components of OFSAAI



2.1.2 OFSAA Infrastructure High Availability

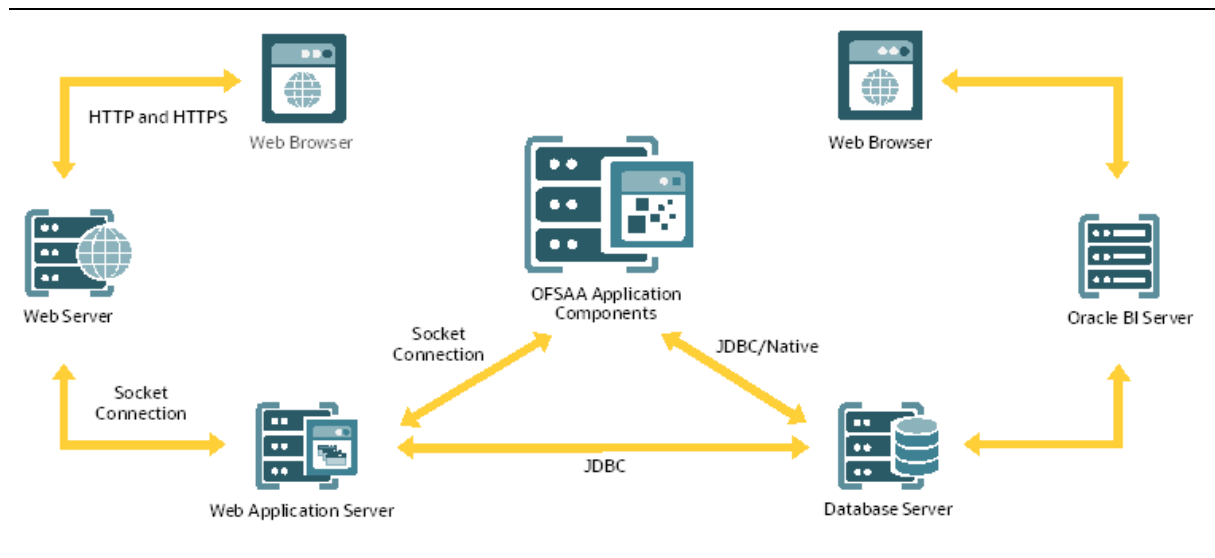
The current release of the OFSAA Infrastructure supports only the "Single Instance" installation for the Infrastructure components. However, the High Availability (HA) for the Database Server and/or the Web application server clustering and deployment is supported in this release.

This release supports the Active-Passive model of implementation for OFSAAI components. For more information, see [Oracle Financial Services Analytical Applications Configuration for High Availability Best Practices Guide](#).

2.1.3 Deployment Topology

The following figure illustrates the deployment topology of OFSAA Applications.

Figure 3: Logical Architecture Implemented for OFSAA Applications



2.2 About the Oracle Financial Services Data Governance for US Regulatory Reporting (DGUSRR) Application

Oracle Financial Services Data Governance for US Regulatory Reporting (DGUSRR) helps financial services institutions loading data from multiple sources through logical interfaces. OFS DGUSRR Application includes the following application:

- Oracle Financial Services Data Governance for US Regulatory Reporting:** Oracle Financial Services Data Governance for US Regulatory Reporting operationalizes the data governance process. The OFSAA Data Governance for US Regulatory Reporting (DGUSRR) enables financial institutions to map multiple data sources to a standard, common business glossary. Oracle Financial Services Data Governance for US Regulatory Reporting automates and operationalizes governance for US regulatory reports to support the Data Management Office, Chief Data Officer, Chief Financial Officer, and Regulatory Reporting teams in their efforts to implement effective data management program to comply with internal and external regulatory standards. It is a content-based governance solution with an active repository themed around regulatory reporting in the United States. The solution ensures accuracy and confidence in the data and the processes used for US regulatory reporting.

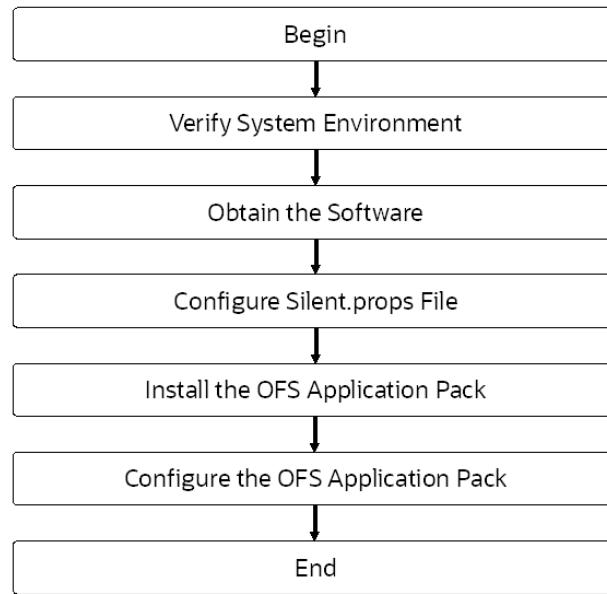
2.3 Installation Overview

To install an OFS DGUSRR Application 8.1.0.0.0 instance, users and administrators must download this installer. The following figure displays the order of procedures you need to follow to install a new OFS DGUSRR Application 8.1.0.0.0 instance.

NOTE

This installer supports both upgrade and fresh installation of OFS DGUSRR 8.1.0.0.0.

Figure 4: Installation Flow



2.4 Installation and Upgrade Scenarios

Release v8.1.0.0.0 of OFS DGUSRR Application supports various installation and upgrade scenarios. A high-level overview of the possible scenarios is provided in the following table. Detailed procedural steps are provided in the succeeding sections of this document.

Table 4: OFS DGUSRR Release 8.1.0.0.0 Installation and Upgrade Scenarios

Scenario	Installation and Upgrade Instructions
New Installation	
<p>Installing Release 8.1.0.0.0 application for the first time (new installation).</p> <p>Or</p> <p>Install OFS DGUSRR Application v8.1.0.0.0 on an Existing OFSAA Instance</p> <p>You have already installed an application from release 8.1.x.0.0 and now you want to install another application from Release 8.1.0.0.0.</p> <p>Example:</p> <p>OFS FSDF is already installed and now you want to install OFS DGUSRR.</p> <p>Or</p> <p>OFS FSDF is already installed, now you want to install OFS USFED and then install OFS DGUSRR.</p> <p>Note: In case, you plan to install USFED, ensure to install US FED and then install DG.</p>	<ol style="list-style-type: none"> 1. Prepare for the Installation. 2. Configure Silent.props 3. Install the OFS DGUSRR Application. 4. Perform Post Installation Activities.
Upgrade Installation	
<p>Upgrade an already installed 8.0.6.1.0 or 8.0.9.0.0 and install OFS DGUSRR of Release 8.1</p> <p>Example: You have installed OFS DGUSRR from Release 8.0.6.1.0 or. Now you want to install OFS DGUSRR of Release 8.1.0.0.0.</p>	<ol style="list-style-type: none"> 1. Clone your existing environment to the 8.1.0.0.0 OFS Analytical Applications Technology Matrix. 2. Upgrade OFS AAI, OFS FSDF, and OFS USFED applications. 3. Update the <code>silent.props</code> file for the sections related to the newly licensed applications. 4. Trigger the DG Release 8.1.0.0.0 installer. 5. This process upgrades the existing applications and installs the newly licensed application.

3 Complete Installation Checklist

For a successful installation, perform the steps listed in the Complete Installation Checklist. You can use this checklist to have a glance at everything that you need to install this application. The link provided in each step takes you to a section either within this document or to another referenced document.

Table 5: Complete Installation Checklist

Sl. No.	Pre-installation Activity
1	<p>Install all the prerequisite hardware and software as per the OFS Analytical Applications Technology Matrix.</p> <ul style="list-style-type: none"> • Configure the Database Instance settings. • Install and configure the web application server. • Configure the HTTP settings on the webserver. • Configure the following Operating System and File System settings. • Update the Environment Settings as required for the installation in the .profile file.
2	Verify the System Environment using the Environment Check Utility.
3	Create all the necessary directories.
4	Download and Extract the OFS DGUSRR Application installer kit.

Sl. No.	Installation Activity
1	Configure the silent.props file.
2	Trigger the OFS DGUSRR Application installation.

Sl. No.	Post-installation Activity
1	Verify the installation logs.
2	Deploy the EAR or WAR files.
3	Start DG Service.
4	Access the OFSAA Application to Create Application Users and Map them to DG User Groups.
5	Executing Scripts and Granting Permissions.
6	Materialized View Creation Batch.
7	Merging Key Indicators.
8	Updating Measures for Key Indicators.
9	Key Indicator Configuration.
10	Performance-Related Configuration Details on Account Mapper Batch.
11	OBIEE Configuration and Deployments.
12	Run Chart for Batch Executions.

Sl. No.	Post-installation Activity
13	Rerun Account Mapper Batch.
14	Integrating AgileREPORTER with Data Governance Variance Analysis.

4 Pre-installation

This section contains the pre-installation requirements to install the OFS Data Governance Application.

You can use this checklist to have a glance at everything that you need to do before installing this application. The link provided in each step takes you to a section either within this document or to another referenced document.

Table 6: Pre-installation Checklist

Sl. No.	Pre-installation Activity
1	<p>Install all the prerequisite hardware and software as per the OFS Analytical Applications Technology Matrix.</p> <ul style="list-style-type: none"> • Configure the Database Instance settings. • Install and configure the web application server. • Configure the HTTP settings on the webserver. • Configure the following Operating System and File System settings. • Update the Environment Settings as required for the installation in the <code>.profile</code> file.
2	Verify the System Environment using the Environment Check Utility.
3	Create all the necessary directories.
4	Download and Extract the OFS DGUSRR Application installer kit.

4.1 Hardware and Software Requirements

For a list of all the hardware and software requirements including operating systems, database, web servers, and web application server versions for which this release of the Oracle Financial Services Data Governance for US Regulatory Reporting Application is qualified, see the [OFSAA Technology Matrix](#).

NOTE OFS DGUSRR Application installation can be performed on both Virtual and Physical servers.

4.1.1 License Information

For details of the third-party software tools used, see the [OFSAA Licensing Information User Manual Release 8.1.0.0.0](#).

4.1.2 Verify the System Environment

To verify your system environment meets the minimum requirements for the installation, a Pre-Install Check utility is available within the Install Kit archive file. This utility can also be obtained separately by contacting [Oracle Support](#).

Though the system environment verification is an integral and automated part of the installation of this software product, Oracle strongly recommends running this utility before beginning the installation as part of your organization's "Installation Readiness Verification Process".

For information about the download and usage of this utility, see the [Oracle Financial Services Analytical Applications Infrastructure Environment Check Utility Guide](#).

4.2 Create the Installation, Download, and Metadata Directories

To install the OFS DGUSRR Application, create the following directories:

- **OFS DGUSRR Download Directory (Optional):** Create a download directory and copy the OFS DGUSRR Application Installer File (archive). This is the directory where you can copy the downloaded installer or patches. Assign 755 permission to this directory.
- **OFSAA Installation Directory (Mandatory):** Create an installation directory where you can install the product binaries. Assign 755 user permission to the installation directory. FIC_HOME variable to be set in the `.profile` pointing to this OFSAA Installation Directory.
- **OFSAA Staging or Metadata Repository Directory (Mandatory):** A directory to hold the application metadata artifacts and additionally act as the staging area for the flat files. You can also refer to this directory as FTPSHARE. Create a Staging or Metadata Repository Directory to copy data files, save data extracts, and so on.

The directory must exist on the same system as the OFSAA Installation. This directory can be configured on a different mount or under a different user profile. However, the owner of the installation directory must have RWX (775) permissions to this directory.

NOTE

Ensure the OFSAA staging directory is not set to the same path as the OFSAA installation directory and is not a subdirectory inside the OFSAA installation directory.

4.3 Preparing for Installation

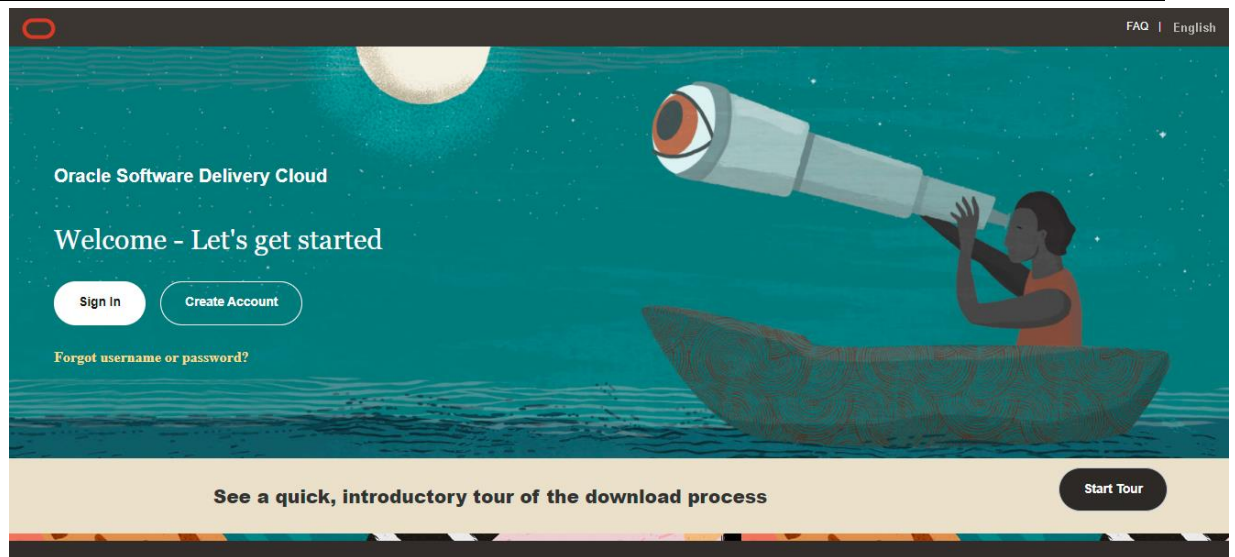
This section describes how to download the installer and the mandatory prerequisites you must ensure installing the OFS DGUSRR Application.

4.3.1 Download the OFS DGUSRR Application Installer and Mandatory Patches

To download the OFS Oracle Financial Services Data Governance for US Regulatory Reporting Application Installer Release 8.1.0.0.0, follow these steps:

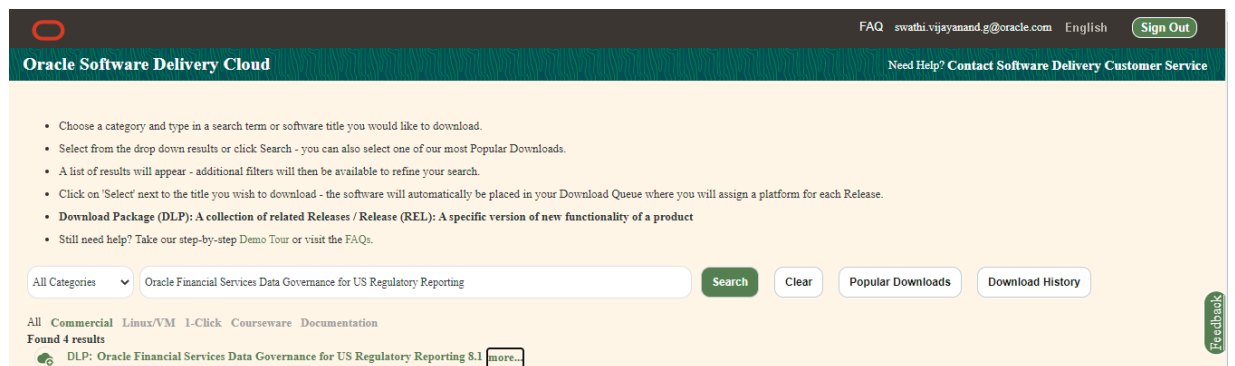
1. Log in to the [Oracle Software Delivery Cloud](#) (OSDC) with a valid Oracle account.

Figure 5: OSDC Login Window



2. Enter **Oracle Financial Services Data Governance for US Regulatory Reporting** in the search box.

Figure 6: OSDC - Search Results



3. Download the installer archive and copy (in Binary mode) to the download directory that exists in the OFS DGUSRR installation setup.
4. Log in to [My Oracle Support](#), search for the **33663417** Mandatory Patch in the **Patches & Updates** Tab and download it.

ATTENTION

On the 10th of December 2021, Oracle released Security Alert CVE-2021-44228 in response to the disclosure of a new vulnerability affecting Apache Log4J prior to version 2.15. The application of the **33663417** Mandatory Patch fixes the issue.

For details, see the My Oracle Support Doc ID [2827801.1](#).

Ensure that you reapply the **33663417** Mandatory Patch whenever you install or upgrade the application or apply an incremental patch.

4.4 Extract the Software

Log in to the UNIX operating system as a non-root user to perform the following steps. To extract the software, follow these steps:

1. If you already have an unzip utility to extract the contents of the downloaded archive, skip this step. Download the unzip utility (OS-specific) `unzip_<os>.Z` and copy it in Binary mode to the directory that is included in your PATH variable.
2. Uncompress the unzip installer file with the following command:

```
uncompress unzip_<os>.Z
```

NOTE

If an error message *uncompress: not found [No such file or directory]* is displayed, contact your UNIX administrator.

3. Extract the contents of the OFS DGUSRR Application Release 8.1.0.0 installer archive file in the download directory with the following command:

```
unzip OFS_DGS_8.1.0.0.0_GENERIC.zip
```

4. Navigate to the download directory and assign 755 permission to the installer directory with the following command:

```
chmod -R 755 OFS DGUSRR Application
```

4.4.1 Prerequisites for Installation

This installer has fresh install capabilities and the following is the prerequisite to install the OFS DGUSRR Application:

- Ensure to install the OFS FSDF 8.1.0.1.0 in the OFSAA instance for a fresh installation.
- Ensure that you install US Fed version 8.1.0.0.0 (applicable only if you are installing US Fed).

5 Installation

This section details the steps you need to follow during the OFS DGUSRR Application installation.

You can use this checklist to have a glance at everything that you need to do to install this application. The link provided in each step takes you to a section either within this document or to another referenced document.

Table 7: Installation Checklist

Sl. No.	Installation Activity
1	Configure the <code>Silent.props</code> file.
2	Trigger the OFS DGUSRR Application installation.

5.1 Configure the Silent.props file

This section is for the fresh installation of OFS DGUSRR Release 8.1.0.0.0.

- In the installer kit path `/appsLibConfig/conf`:
 - For RDBMS installation, rename the `Silent.template` file to `Silent.props`.
 - Edit the `Silent.props` file.
- Modify only the following parameters.

Table 8: Parameters for the Silent.props File

Property Name	Description of Property	Permissible values	Comments
LOG_MODE	Mode for logging	1 = Debug 0 = General	# Default; LOG_MODE: 0
INFODOM_NAME	Specify the name of Information Domain(<code>infodom</code>)	Example: <code>INFODOM_NAME=DGSINFO</code>	# Specify the name of Information Domain(<code>infodom</code>) into which you wish to install
SEGMENT_1_CODE	Segment Code	Example: <code>DGSSEG</code>	# Mandatory Segment Code should not exceed 10 characters and there should not be special characters or extra spaces
APPFTP_LOG_PATH	Information Domain Maintenance log path(to be created) for the new Information Domain for App Layer	Example: <code>/ftpshare/DGSINFO/logs</code>	# Mandatory if this an App Layer Installation and want to create a new Information Domain
DBFTP_LOG_PATH	Information Domain Maintenance log path(to be created) for the new Information Domain for DB Layer	Example: <code>/ftpshare/DGSINFO/logs</code>	# Mandatory if this an App Layer Installation and want to create a new Information Domain

Property Name	Description of Property	Permissible values	Comments
UPLOAD_MODEL	Whether you want to perform Model Upload	0 = No 1 = Yes	# Mandatory UPLOAD_MODEL=1
MODEL_TYPE	Released data model or Customized data model	0 = released 1 = customized	# Mandatory only in the case of MODEL_TYPE=0
DATAMODEL	The file name for the customized data model	Not Applicable	# Mandatory only in the case of uploading the customized data model # Option selected for MODEL_TYPE=1
DM_DIRECTORY	The path for the customized data model	Not Applicable	# Mandatory only in the case of uploading the customized data model # Option selected for MODEL_TYPE=1
ETL_APPSRC_TYPE	The ETL application name	0 = New Pair 1 = Existing	# Mandatory ETL_APPSRC_TYPE=0 ETL_APPSRC_TYPE=1
ETL_SRC_1_NAME	ETL FSDF Staging Source Name	Example: STAGING	# Mandatory ETL_SRC_1_NAME=STAGING
ETL_SRC_1_DESC	ETL FSDF Staging Source Description	Example: STAGING	# Mandatory ETL_SRC_1_DESC=STAGING
ENABLE_CONCURRENCY	#Support for Parallelism	0 = No 1 = Yes	#Optional ENABLE_CONCURRENCY=1
CONCURRENCY_LEVEL	#Support for Parallelism	Example: CONCURRENCY_LEVEL=10 , which means 10 threads are triggered to handle the processing of fsapps.	#Optional

5.2 Install the OFS DGUSRR Application

Installing Release 8.1.0.0.0 application for the first time (new installation).

Or

Install OFS DGUSRR Application v8.1.0.0.0 on an Existing OFSAA Instance

You have already installed an application from release 8.1.x.0.0 and now you want to install another application from Release 8.1.0.0.0.

For example, OFS FSDF is already installed and you want to install OFS DGUSRR or OFS FSDF is already installed, and you want to install OFS USFED and then install OFS DGUSRR.

NOTE In case, you plan to install USFED, ensure to install US FED and then install DG.

ATTENTION Before you begin the installation, configure and execute the Silent.props file. See [Configure the Silent.props File](#).

To install the OFS DGUSRR Application v8.1.0.0.0, follow these steps:

1. Log in to the system as a non-root user.
2. Navigate to appsLibConfig and then open the Conf folder.
3. Rename the Silent.template to Silent.props.
4. Edit the Silent.props with the required configurations.
5. Navigate to OFS_DGS/bin and execute Setup.sh.
6. Enter the following command in the console to execute the OFS DGUSRR Application installer with the Silent option.

```
./setup.sh SILENT
```

Figure 7: Execute the OFS DGUSRR installer in the SILENT mode

```
Host specific info (below) - you can modify contents of /etc/motd_hostinfo as needed to update data:

.profile executed
/scratch/dgaapp>cd /scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin
/scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin>ls
installer.properties mediaPack.tar.gz nohup.out Setup.sh
/scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin>./Setup.sh SILENT
/scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin
loading from /scratch/dgaapp/kit/0100/DG_FINAL/appsLibConfig/conf/Silent.props
etlAppSrcType->1
Source Name->DMSRC
Number of sources->1
Shutdown of OFSAAI services started...
Shutdown of OFSAAI services done.
Starting OFSAA Service...
OFSAA Service - OK
```

7. The OFS DGUSRR Application installation begins.

Figure 8: OFS DGUSRR Application Starting Installation and Installation Complete

```
Starting installation...
***** Starting installation of OFS_DGS ~ OFS_DGS ~ 8.1.0.0 *****
----- DB Scripts Execution Started-----
----- DB Scripts Execution Completed-----
-----Uploading Data model into application schema-----
[DynamicServiceManager][GlobalParameters.ISWEB]false
erwinXMLPath for [DGSINFO] is [/scratch/dgaapp/ftpshare//DGSINFO/erwin/erwinXML]
----- DB Scripts Execution Started-----
----- DB Scripts Execution Completed-----
----- DB Scripts Execution Started-----
----- DB Scripts Execution Completed-----
===== APP INSTALLATION COMPLETED . =====
----- KINDLY REFER LOG FILE FOR MORE INFORMATION -----
Installation Completed...
```


8. The following message is displayed in the console:

Installation completed...

9. The OFSAA Infrastructure installation performs a post-install health check automatically on the successful installation of the product.
10. To verify if the release is applied successfully, check the log files mentioned in the [Verify the Log File Information](#) section.
11. Perform the steps mentioned in the [Post-installation](#) section.

6 Post-installation

You can use this checklist to have a glance at everything that you need to do after post-installing this application. The link provided in each step takes you to a section either within this document or to another referenced document.

NOTE See the *Post-Installation* section in the [OFS AAI Release 8.1.0.0 Installation and Configuration Guide](#) to complete these procedures.

Table 9: Post-installation Checklist

SI. No.	Post-installation Activity
1	Patch OFSAA Infrastructure Installation
2	Verify the installation logs.
3	Deploy the EAR or WAR files.
4	Start DG Service.
5	Access the OFSAA Application to Create Application Users and Map them to DG User Groups.
6	Executing Scripts and Granting Permissions.
7	Materialized View Creation Batch.
8	Merging Key Indicators.
9	Updating Measures for Key Indicators.
10	Key Indicator Configuration.
11	Performance-Related Configuration Details on Account Mapper Batch.
12	OBIEE Configuration and Deployments.
13	Run Chart for Batch Executions.
14	Rerun Account Mapper Batch.
15	Integrating AgileREPORTER with Data Governance Variance Analysis.

6.1 Patch OFSAA Infrastructure Installation

Oracle strongly recommends installing the latest available patch set to be up-to-date with the various releases of the OFSAA product.

Apply the following mandatory patch:

- 33663417

ATTENTION On the 10th of December 2021, Oracle released Security Alert CVE-2021-44228 in response to the disclosure of a new vulnerability affecting Apache Log4J prior to version 2.15. The application of the **33663417** Mandatory Patch fixes the issue.

For details, see the My Oracle Support Doc ID [2827801.1](#).

Ensure that you reapply the **33663417** Mandatory Patch whenever you install or upgrade the application, or apply an incremental patch.

For patch download information, see the **Download the OFSAAI Applications Pack Installer and Patches** section in [Pre-installation](#) for a new installation and in [Upgrade](#) for an upgrade installation.

See [My Oracle Support](#) for more information on the latest release.

6.2 Verify the Log File Information

See the following logs file for more information:

- The `OFS_DGS_installation.log` file in the `OFS_DGS/logs`.

6.3 Deployment Steps in case of Different OFSAA Release Instances

If you are deploying DGS 8.1 on an instance where you are running OFS AAI v8.1.2 and OFSDF v8.1.2, then follow these steps:

1. Navigate to the path `$FIC_HOME/ficweb/webroot/metadataReport`.
2. Open the `MDRTempDefn.jsp` file in an editor.
3. Find `src="../../libs/js/libs/require/require.js"` and replace it with `src="../../oj_libs_9/js/libs/require/require.js"` and save the file.
4. Execute the following commands in the Atomic Schema.
 - a. `CREATE OR REPLACE SYNONYM AAI_WF_PROCESS_B FOR ##CONF_USER##.AAI_WF_PROCESS_B;`
 - b. `CREATE OR REPLACE SYNONYM AAI_WF_PROCESS_TL FOR ##CONF_USER##.AAI_WF_PROCESS_TL;`
 - c. `CREATE OR REPLACE SYNONYM AAI_WF_ACTIVITY_B FOR ##CONF_USER##.AAI_WF_ACTIVITY_B;`
 - d. `CREATE OR REPLACE SYNONYM AAI_WF_ACTIVITY_SUBPROCESS FOR ##CONF_USER##.AAI_WF_ACTIVITY_SUBPROCESS;`

NOTE

Before executing above commands, replace `##CONF_USER##` with Config Schema name and then execute above commands.

6.4 Deploying Activities

Perform the following deployment activities:

1. **Deploy** the EAR or WAR files.
2. In case, you are deploying in WebLogic environment, add the following tags in the `weblogic.xml` in both the application layers and in the deployed location:

```
<prefer-application-packages>
<package-name>org.codehaus.jackson.*</package-name>
</prefer-application-packages>
<prefer-application-resources>
<resource-name>org.codehaus.jackson.*</resource-name>
</prefer-application-resources>
```

3. In case, you are deploying in Tomcat environment, comment the following tags in the `web.xml` in the deployed area and then restart the servers.

```
<filter>
<filter-name>struts2</filter-name>
<filter-
class>org.apache.struts2.dispatcher.ng.filter.StrutsPrepareAndExecut
eFilter</filter-class>
</filter>
<filter>
<filter-name>struts-cleanup</filter-name>
<filter-
class>org.apache.struts2.dispatcher.ng.filter.StrutsPrepareFilter</f
ilter-class>
</filter>
<filter-mapping>
<filter-name>struts2</filter-name>
<url-pattern>/glreconciliation/*</url-pattern>
<url-pattern>/fsapps/*</url-pattern>
</filter-mapping>
<filter-mapping>
<filter-name>struts-cleanup</filter-name>
<url-pattern>/fsapps/*</url-pattern>
<url-pattern>/glreconciliation/*</url-pattern>
</filter-mapping>
```

4. Update the following tag in `web.xml` in the deployed area and then restart the services.

```
<filter>
<filter-name>FilterServlet</filter-name>
<filter-class>com.iflex.fic.filters.FilterServlet</filter-class>
<init-param>
```

```

        <param-name>AllowHosts</param-name>
        <param-value>http:// ##OFS AAI##/ ##OBIEE URL##/</param-
value>
</init-param>
</filter>

```

6.5 Start the DG Services

Navigate to `$FIC_HOME/ficdb/bin` and execute `agentstartup.sh`

6.6 Map the Application DG User (or Users) to User Group

User *UserGroup Map* facilitates you to map a user (or users) to a specific user group that in turn is mapped to a specific Information Domain and role. Every user group mapped to the Information Domain needs to be authorized, otherwise, it cannot be mapped to users.

User **UserGroup Map** screen displays details such as User ID, Name, and the corresponding Mapped Groups. You can view and modify the existing mappings within the **User UserGroup Maintenance** screen.

Starting with the OFSAA 8.1 release, with the installation of the OFS DGUSRR Application, preconfigured Application user groups are seeded. These user groups are unique to every OFSAA Application and have application roles pre-configured.

You can access the **User UserGroup Map** by expanding the **Identity Management** pane within the tree structure of the LHS menu.

After the user is created for Data Governance for different jurisdictions, it must be mapped to the required user groups as per their roles:

- **Process Monitoring Module:** DGSPLANSCOPE, DGSPSI, DGPMVIEWGRP

Create application-specific users and map them to the respective user groups available in the application. Create a group, map the following roles, and assign them to the user.

NOTE Ensure to create a group in User Group Maintenance to map the roles. The group created must be mapped to the created user.
Ensure the domains in the User Domains Map must be mapped to the created group.

Table 10: DG User Group Map

V_Role_code	V_role_name	V_role_desc
MDBWRITE	MDB Write	Metadata Browser Write
INBOXACC	Inbox Access	Inbox Access
LINEAGE	LINEAGE	Role code for LINEAGE
ACTNANLST	Action analyst	privilege to manage action and create or delete an adjustment
ISSUEADMN	Issue admin	privilege to create and close issues

V_Role_code	V_role_name	V_role_desc
ISSUEANLST	Issue analyst	Manage issues and create action for the issues
MDRGENXML	DGS MDR Generate XML	MDR Generate XML
CTLVIEWR	Control viewer	Control viewer role
ISSASR	Issue Owner	Issue Owner
MDREDIT	DGS MDR Edit	MDR Edit
MDRADD	DGS MDR Add	MDR Add
ACTASR	Action Assessor	Action Assessor
CDEVIEWR	Critical Data Elements	Critical Data Elements viewer role
MDRDWNLD	DGS MDR Download	MDR Download
ACTVIEWER	Action Viewer	Action Viewer
MDRDELETE	DGS MDR Delete	MDR Delete
DGADMINR	DG Administration	DG Administration role
BTVIEWR	Business terms viewer	Business terms viewer role
DGSADMINRL	DGS Administrator	DGS Administrator Role
MDRGEN	DGS MDR Generate	MDR Generate
ISSAPR	Issue Creator	Issue Creator
ADJCREATOR	Adjustment Creator	Adjustment Creator Role
ADJAPPROVE	Adjustment Approver	Adjustment Approver Role

NOTE

- Do not map the group DGREPANGRP and DGREPMANGRP while mapping the group to the user.
- Adjustment Approver and Adjustment Creator must not be mapped to the same user.

1. After successful installation, execute the batch <INFODOM>_USER_ROLES.
2. Perform these steps:
 - a. Resave the following mentioned derived entities:
 - DEATNAME: DE Attribute Name
 - DE Business Line
 - DEGLSTERM: DE Business Term
 - DE Components
 - DE Document Type
 - DEENNAME: DE Entity Name
 - DE Frequency

- DE KI Frequency
 - DE Location
 - DE Measure Scale
 - DE Process
 - DE Risk Categories
 - DE User List
 - DE_GROUP
 - PMREPLINK
- b. Resave the following hierarchies:
- HDGENNAM: Entity Name Hierarchy
 - HDGATNAM: Attribute Name Hierarchy
 - HDGGLTRM: Business Term Hierarchy
 - Reports Hierarchy
3. Compile the backend objects such as functions, procedures, and packages that are related to DGS.
- Execute below statement after replacing Atomic schema name
- ```
begin
DBMS_UTILITY.compile_schema(schema => '##Atomic_schema_name##');
end;
```

## 6.7 Executing Scripts and Granting Permissions

To execute scripts and grant permissions, perform the following steps:

1. Execute the following scripts:
  - a. [DGS\\_DIM\\_OR\\_STATUS.sql](#)
  - b. [DGS\\_DIM\\_OR\\_STATUS\\_MLS.sql](#)
2. Log into Config Schema and execute the following script:

```
update AAI_APP_PACK_AUDIT_TRAIL set V_APP_PACK_ID='OFS_RRRS_PACK' where
v_app_id='OFS_DGS';
```
3. Execute the Grant command for the Dynamic KI batch:

```
GRANT SELECT ON ##CONF_USER##.batch_task_precedence_master TO
##ATOMIC_USER###CONF_USER##--config schema name
##ATOMIC_USER##--atomic schema name
```
4. Add the following column to the adjustment table:

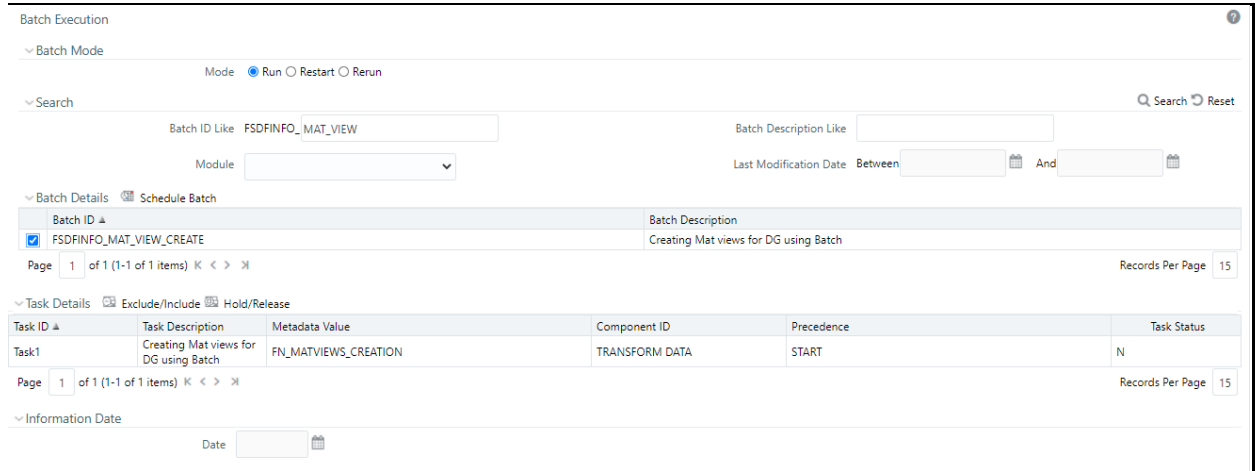
```
ALTER TABLE FCT_REG_REPORT_ADJUSTMENTS ADD (N_DATA_SOURCE_CD
NUMBER(10,0));
```

## 6.8 Materialized View Creation Batch

To materialize the view creation batch, follow these steps:

1. From the **Financial Services Data Foundation** window navigate to **Operations** and select **Batch Execution**.
2. Execute the batch **##INFODOM##\_MAT\_VIEW\_CREATE** on sysdate. This batch creates the materialized views needed.

**Figure 9: Batch Execution**



**NOTE**

After materializing the View Creation Batch, run the following command in Atomic Schema to compile all the invalid objects in the Atomic Schema.

Replace the **##ATOMIC\_USER##** with the actual Atomic Schema Name.

```
begin
DBMS_UTILITY.compile_schema(schema =>
'##ATOMIC_USER##');
end;
/
```

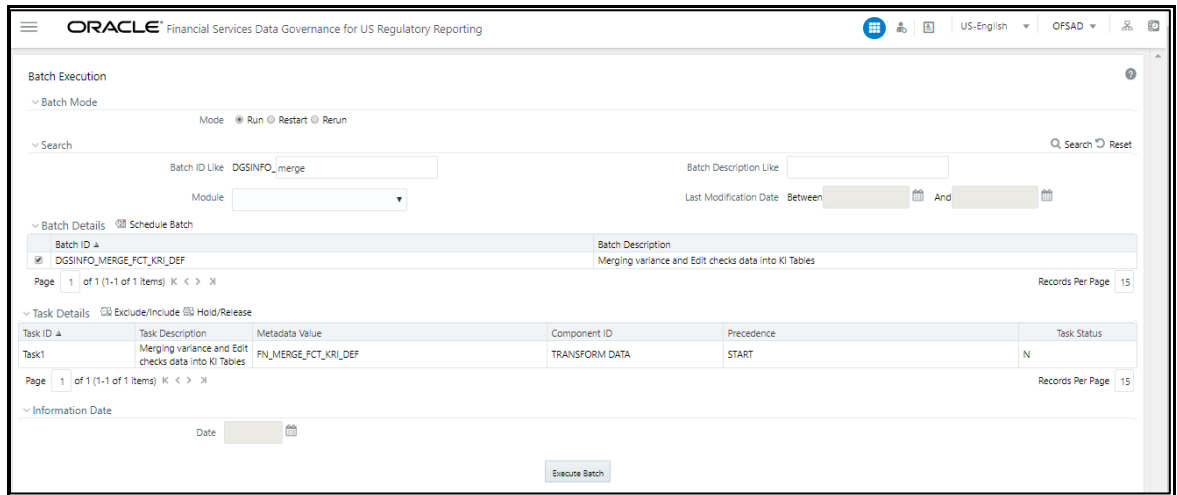
## 6.9 Merging Key Indicators

To merge the Key Indicators, follow these steps:

1. From the **Financial Services Data Foundation** window navigate to **Operations** and select **Batch Execution**.
2. Execute the Batch Name as **MERGE\_FCT\_KRI\_DEF**. This batch is used to merge the variance and edit checks into the Key Indicators.
3. Enter the current system date as the **MISDATE** for this batch.

**Figure 10: Batch Execution**





## 6.10 Configuring Process Monitoring Runs and Tasks

As a pre-requisite, before configuring the runs and tasks, ensure the following:

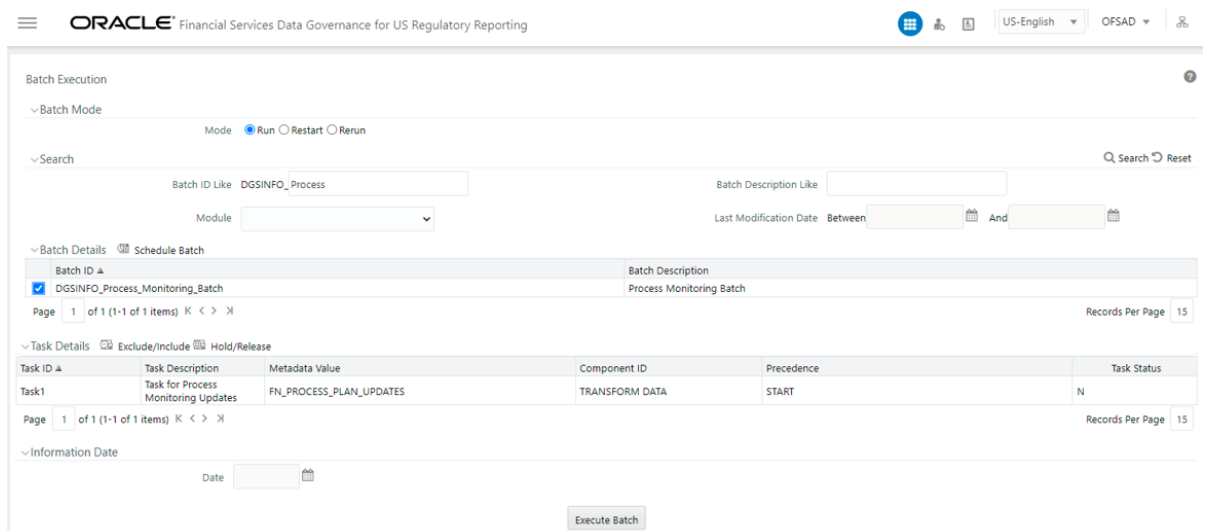
- Oracle Financial Services Regulatory Reporting for US Federal Reserve (OFS REG REP USFED 8.1.0.0.0) is installed and configured.
- MDB Publish is performed for Oracle Financial Services Regulatory Reporting for US Federal Reserve 8.1.0.0.0.

**NOTE**

See Oracle Financial Services Regulatory Reporting for US Federal Reserve on [OHC](#) for more details.

As part of configurations to load the Process Monitoring-related plans, runs, and tasks associated with OFS REG REP USFED install, follow these steps:

1. Login to OFSAAI using a user having permissions for running batches.
2. From the **Financial Services Data Foundation** window navigate to **Operations** and select **Batch Execution**.



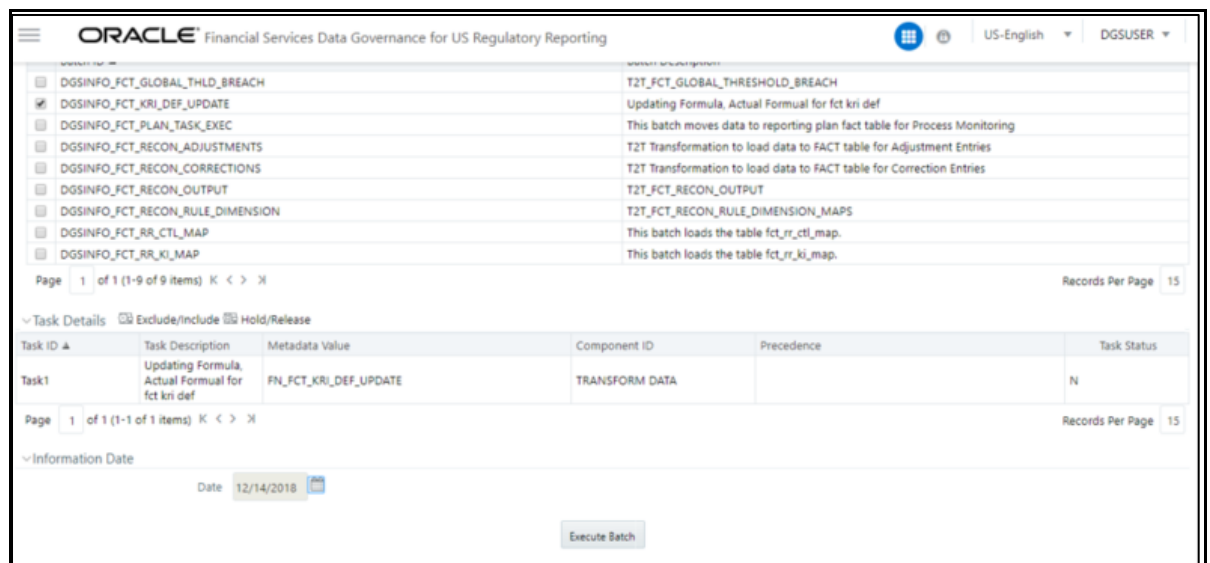
3. Select the **MIS Date** and execute the batch **Process\_Monitoring\_Batch**.
4. Check and ensure that the batch is executed successfully.
5. Navigate to the **Process Monitoring** menu under Data Governance application and ensure that the Plans, Runs, and Tasks are displayed for OFS REG REP USFED.

## 6.11 Updating Measures for Key Indicators

To update Measures for Key Indicators, follow these steps:

1. From the **Financial Services Data Foundation** window navigate to **Operations** and select **Batch Execution**.
2. Run the batch **##INFODOM##\_FCT\_KRI\_DEF\_UPDATE** on sysdate. This batch is used to update the measure name, map key, and measure key for the Key Indicators available in the system.
3. Enter the current system date as the MISDATE for this batch.

**Figure 11: Batch Execution**



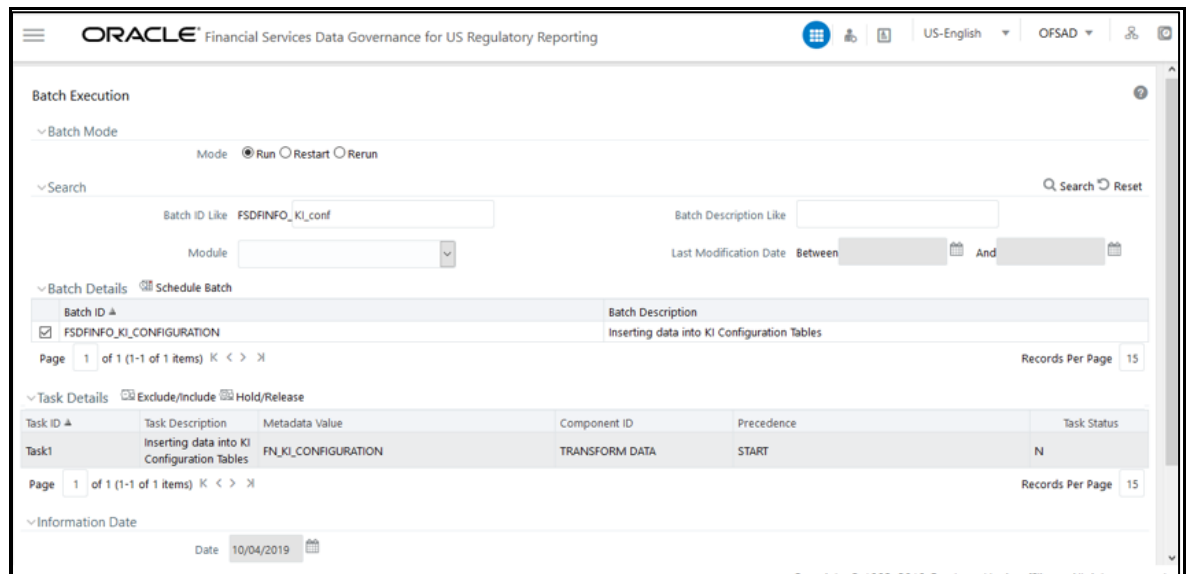
## 6.12 Key Indicator Configuration

From **Financial Services Data Foundation** window navigate to **Operations** and select **Batch Execution**. Run the batch **##INFODOM##\_KI\_CONFIGURATION**. This batch is used to update the Actual Formula for the key indicator. This batch generates the report, schedule, and cells required for Key Indicator assessment configurations.

From the **Financial Services Data Governance for US Regulatory Reporting** window navigate to **Administration** and select **Key Indicator Assessment Configuration**. Here, you can select and configure the report, schedule, and cell combinations.

For more information on Key Indicator Assessment Configurations, see the *Defining the Key Indicators for Monitoring* section in the [OFS DG US Regulatory Reporting 8.1.0.0 User Guide](#).

**Figure 12: Batch Execution**



## 6.13 Changing Batch Ownership for Key Indicator and Account Mapper Batch

All the seeded batches are created with SYSADMIN as the owner by default. This needs to be updated with the username of the user who is responsible for the maintenance of the batches. This can be done by executing the below procedure in the Config Schema:

```
begin
AAI_OBJECT_ADMIN.TRANSFER_BATCH_OWNERSHIP('fromUser','toUser','infodom;
end;
OR
begin
AAI_OBJECT_ADMIN.TRANSFER_BATCH_OWNERSHIP('fromuser','touser');
end;
```

where “FromUser” indicates the user who currently owns the batch and “toUser” indicates the user to which ownership needs to be transferred. “Infodom” is an optional parameter.

### 6.13.1 Create Issue Link to Open in Supported Browsers in OBIEE

To create an issue link to open in supported browsers from Variance Analysis Dashboard, perform the following steps:

1. Update the web.xml with the following tag.
  - a. Go to the path where web.xml is available, and then add the highlighted tag in the following section with the DG application URL and the OBIEE URL.

```
<filter>
 <filter-name>FilterServlet</filter-name>
 <filter-class>com.iflex.fic.filters.FilterServlet</filter-class>
</init-param>
 <param-name>AllowHosts</param-name>
```

```

<param-value> ##OFS AAI##/##OBIEE URL##/</param-value>
</init-param>
</filter>

```

\*Ensure to replace ##OFS AAI\_URL##/ ##OBIEE\_URL## with respective URL's upto Port Number.

2. After updating, restart the servers for the change to be reflected.

## 6.14 Performance-Related Configuration Details on Account Mapper Batch

- Parallel Hint for query optimization in KI Mapper can be made configurable by setting up N\_LOOKUP\_VALUE in FSI\_DGS\_CONFIGURATION against the following column values(V\_MODULE\_NAME='MAPPER', V\_LOOKUP\_CODE='PARALLEL\_HINT'). The default value set for parallel hint is /\*+ PARALLEL(4)\*/.

V_MODULE_NAME	V_LOOKUP_CODE	N_LOOKUP_VALUE	V_LOOKUP_CODE_DESC
MAPPER	PARALLEL_HINT	/*+ PARALLEL(4)*/	Parallel hint for query optimization for KI Mapper.

- Parallel Hint for Gather Stats optimization in KI Mapper can be made configurable by setting up N\_LOOKUP\_VALUE in FSI\_DGS\_CONFIGURATION against the following column values(V\_MODULE\_NAME='MAPPER', V\_LOOKUP\_CODE='GATHER\_STATS\_PARALLEL\_HINT'). The default value set for the parallel hint is 8.

V_MODULE_NAME	V_LOOKUP_CODE	N_LOOKUP_VALUE	V_LOOKUP_CODE_DESC
MAPPER	GATHER_STATS_PARALLEL_HINT	8	Parallel hint for Gather Stats optimization for KI Mapper

- Parallel configs for KI Mapper can be made configurable by setting up N\_LOOKUP\_VALUE in FSI\_DGS\_CONFIGURATION against the following column values (V\_MODULE\_NAME='MAPPER', V\_LOOKUP\_CODE= ENABLE\_PARALLEL\_CONFIGS). The default value is set as 'N'.

V_MODULE_NAME	V_LOOKUP_CODE	N_LOOKUP_VALUE	V_LOOKUP_CODE_DESC
MAPPER	ENABLE_PARALLEL_CONFIGS	N	Enable Parallel Configurations

- Enable Alter session force parallel for KI Mapper can be made configurable by setting up N\_LOOKUP\_VALUE in FSI\_DGS\_CONFIGURATION against the following column values(V\_MODULE\_NAME='MAPPER', V\_LOOKUP\_CODE= Enable STAR\_TRANSFORMATION, Enable Parallel DML, Enable Parallel Query). The default value set as '4' for Enable Parallel DML and Enable Parallel Query, user can set it to any parallels like 4,8,16...

V_MODULE_NAME	V_LOOKUP_CODE	N_LOOKUP_VALUE	V_LOOKUP_CODE_DESC
MAPPER	DGS_STMT_1	ALTER SESSION SET STAR_TRANSFORMATION_ENABLED=TRUE	Enable STAR_TRANSFORMATION
MAPPER	DGS_STMT_2	ALTER SESSION FORCE PARALLEL DML PARALLEL 4	Enable Parallel DML
MAPPER	DGS_STMT_3	ALTER SESSION FORCE PARALLEL QUERY PARALLEL 4	Enable Parallel Query

- Truncate partition for KI Mapper can be made configurable by setting up N\_LOOKUP\_VALUE in FSI\_DGS\_CONFIGURATION against the following column values(V\_MODULE\_NAME='MAPPER', \_LOOKUP\_CODE= TRUNCATE\_PARTITION\_FLAG, TRUNCATE\_SUBPARTITION\_FLAG). The default value is set as 'Y' for TRUNCATE\_PARTITION\_FLAG and Y for TRUNCATE\_SUBPARTITION\_FLAG.

V_MODULE_NAME	V_LOOKUP_CODE	N_LOOKUP_VALUE	V_LOOKUP_CODE_DESC
MAPPER	TRUNCATE_PARTITION_FLAG	Y	Flag to truncate run skew wise partition
MAPPER	TRUNCATE_SUBPARTITION_FLAG	Y	Flag to truncate run skew wise sub-partition

- Parallel groups for KI Assessment can be made configurable by setting up N\_LOOKUP\_VALUE in FSI\_DGS\_CONFIGURATION against the following column values(V\_MODULE\_NAME=KI, \_LOOKUP\_CODE= ASSMT\_PARALLEL\_GROUP). The default value is set as '14'.

V_MODULE_NAME	V_LOOKUP_CODE	N_LOOKUP_VALUE	V_LOOKUP_CODE_DESC
KI	ASSMT_PARALLEL_GROUP	14	Parallel Group number for KI Assessment

**NOTE** All the mapper tables like FSI\_KICOND\_ACCNT\_MAP, FSI\_KICOND\_REPLINE\_MAP, FSI\_KICOND\_ACCNT\_WRITEOFF\_MAP, FSI\_KICOND\_ACCNT\_RECOVERY\_MAP, FSI\_KI\_REG\_FUND\_LEND\_EXP\_MAP and FSI\_KICOND\_PARTY\_MAP are created out of the box as non-partitioned table with index, if later they are converted into Partitioned table then the associate Index should also be recreated as a Local index else Truncate Reload partition will make the index as unstable.

## 6.15 OBIEE Configuration and Deployments

The following OBIEE configuration files must be updated to change the user's preferred currency:

- Login to the OBIEE Server.
- Edit the `/Oracle_Home/bi/bifoundation/web/display/currencies.xml` file.
- Update `"symbol="$"` to change the preferred currency as follows:

```

<Currency tag="int:wrhs" type="international" placeholder="true"
symbol="$" format="$#" digits="2"
displayMessage="kmsgCurrencySiebelWarehouse">
 <negative tag="minus" format="-$#" />
</Currency>

```

4. Copy the `DGS.catalog` and `DGS.rpd` files from the `<FIC_HOME>/DGSBI` directory to your local machine and redeploy the `DGS.catalog` and `DGS.rpd` files.

## 6.16 Run Chart for Batch Executions

For batch executions, see the [DGS US Regulatory Reporting 8.1.0.0.0 Run Chart](#).

## 6.17 Rerun Account Mapper Batch

Truncate Partition and Sub Partition flags are enabled to rerun the account mapper batch.

TRUNCATE\_PARTITION\_FLAG must be marked as Y when RUN\_SKEY wise partition is used.

TRUNCATE\_SUBPARTITION\_FLAG must be marked as Y when truncate run key wise sub-partition is used.

V_MODULE_NAME	V_LOOKUP_CODE	N_LOOKUP_VALUE	V_LOOKUP_CODE_DESC
MAPPER	TRUNCATE_PARTITION_FLAG	Y	Flag to truncate run key wise partition
MAPPER	TRUNCATE_SUBPARTITION_FLAG	Y	Flag to truncate run key wise sub-partition

### NOTE

Before rerunning the mapper for the Run Skey, MISDATE, and ENTITY Skey, if RUNSKEY level partitioning and sub partitioning are not defined, the records in the following tables must be manually truncated for the same Run Skey, MISDATE, and ENTITY Skey.


- FSI\_KI\_REG\_FUND\_LEND\_EXP\_MAP
- FSI\_KICOND\_ACCNT\_WRITEOFF\_MAP
- FSI\_KICOND\_PARTY\_MAP
- FSI\_KICOND\_CUSTOMER\_MAP
- FSI\_KICOND\_ACCNT\_PARTY\_MAP
- FSI\_KICOND\_CREDIT\_PARTCPN\_DTLS
- FSI\_KICOND\_REPLINE\_MAP
- FSI\_KICOND\_ACCNT\_MAP
- FSI\_KICOND\_ACCNT\_RECOVERY\_MAP
- FSI\_KICOND\_REG\_LOANS\_SERVICE

## 6.18 Integrating AgileREPORTER with Data Governance Variance Analysis

AgileREPORTER can be integrated with Data Governance Variance Analysis reports from the AgileREPORTER - Dashboard and Analysis AgileREPORTER - Module Integration features.

### 6.18.1 AgileREPORTER - Dashboard Integration

To establish the connection in AgileREPORTER – Dashboard, follow these steps:

1. Log in to **AgileREPORTER** with valid credentials.
2. Navigate to **Settings** .
3. Select **Administration** and then select **Data Warehouse Integration**.
4. In the **Data Warehouse Integration** window, click **Add**.
5. In the **Add Contextual Button** dialog box, enter the following details:

**b. Name:** OFSAA Current Analysis

**c. Linked to:** AgileREPORTER

**d. URL Pattern:** Enter the following URL in the **URL Pattern** text box:

```
###OBIEEURL###/analytics/saw.dll?dashboard&PortalPath=%2Fshared%2FDGS%2FAccount%20Level%20Reports%2FAccount%2FVariance%20Analysis%20Summary%20AR&page=Variance%20Current%20Analysis%20AR&Options=rmf&Action=Navigate&P0=7&P1=eq&P2=ifnull(%22Report%20Schedule%20Reporting%20Element%22.%22Cell%20Id%20Bireport%22%2C%22Report%20Schedule%20Reporting%20Element%22.%22Reporting%20Element%22)&P3=${cellId}&P4=eq&P5=%22Report%20Schedule%20Reporting%20Element%22.%22AR%20Form%20Code%22&P6=${formCode}&P7=eq&P8=%22Dim%20Dates%22.%22Date%20Skey%22&P9=${referenceDate}&P10=eq&P11=%22Report%20Schedule%20Reporting%20Element%22.%22V_ENTITY_CODE%22&P12=${entityCode}
```


#### NOTE

Ensure to replace the placeholder **###OBIEEURL###** with OBIEE Dashboard URL up to the port number.

- e. Description:** OFSAA Current Analysis
  - f. Pick an icon:** Select any icon.
6. Click **Add**. The **OBIEE URL Pattern** link is now enabled in the **Dashboard** tab.

### 6.18.2 AgileREPORTER - Analysis Module Integration

To establish the connection in AgileREPORTER – Analysis Module Integration, follow these steps:

1. Log in to **AgileREPORTER** with valid credentials.
2. Navigate to **Settings** .
3. Select **Administration** and then select **Data Warehouse Integration**.
4. In the **Data Warehouse Integration** window, click **Add**.
5. In the **Add Contextual Button** dialog box enter the following details:
  - a. Name:** OFSAA Variance Analysis
  - b. Linked to:** Analysis Module

- c. **URL Pattern:** Enter the following URL in the **URL Pattern** text box:

```
###OBIEEURL###/analytics/saw.dll?dashboard&PortalPath=%2Fshared%2FDGS%2FAccount%20Level%20Reports%2FAccount%2FVariance%20Analysis%20Summary%20AR&page=Variance%20Analysis%20AR&Options=rmf&Action=Navigate&P0=7&P1=eq&P2=ifnull(%22Report%20Schedule%20Reporting%20Element%22.%22Cell%20Id%20Bireport%22%2C%22Report%20Schedule%20Reporting%20Element%22.%22Reporting%20Element%22)&P3=${cellId}&P4=eq&P5=%22Report%20Schedule%20Reporting%20Element%22.%22AR%20Form%20Code%22&P6=${formCode}&P7=eq&P8=%22Dim%20Dates%22.%22Date%20Skey%22&P9=${referenceDate}&P10=eq&P11=%22Report%20Schedule%20Reporting%20Element%22.%22V_ENTITY_CODE%22&P12=${entityCode}&P13=eq&P14=%22Dim%20Dates%22.%22Date%20Skey%20Prev%22&P15=${prv_referenceDate}
```

**NOTE** Ensure to replace the placeholder **###OBIEEURL###** with OBIEE Dashboard URL up to the port number.

- d. **Description:** OFSAA Variance Analysis  
e. **Pick an icon:** Select any icon.
6. Click **Add**. The **OBIEE URL Pattern** link is now enabled in the **Analysis** tab.

## 6.19 Alias Configurations

Update the ActionFrameworkConfig.xml file with the following aliases:

ActionFrameworkConfig.xml file is found in the following OBIEE path:

```
/scratch/<user>/Oracle/Middleware/Oracle_Home/user_projects/domains/bi/config/fmwconfig/biconfig/actions
```

```
<aliases>
 <location-alias>
 <alias>ofsaas_dgs_obj</alias>
 <actual>&#amp;#amp;OBIEE URL&#amp;#/analytics/saw.dll</actual>
 </location-alias>
 <location-alias>
 <alias>ofsaas_dgs</alias>
 <actual>&#amp;#amp;OFS AAI URL&#amp;/issues/add/<infodom name>/31</actual>
 </location-alias>
</aliases>
```

\*Ensure to replace ##OBIEE URL## and ##OFS AAI URL## with the respective URLs.

## 6.20 View OFSAA Product Licenses after Installation of Application Pack

In an integrated environment, where you have multiple applications installed on the same domain or infrastructure, OFSAAI allows you to see the other licensed applications through the UI. For more



information, see the *View OFSAA Product Licenses after Installation of Application Pack* in the [OFS Analytical Applications Infrastructure User Guide Release 8.1.0.0.0](#).

# Part II

## Topics:

- [Upgrade](#)

## 7 Upgrade

This section includes the procedures for the various upgrade scenarios supported by OFS DGUSRR Release 8.1.0.0.0.

### 7.1 Prerequisites for Upgrade

OFS DGUSRR supports 8.0.6.1.0 and 8.0.9.0.1 upgrades.

The prerequisite to upgrade to the OFS DGUSRR Application are as follows:

- For **8.0.6.1.0 DG** Upgrade, ensure to install the following applications in the same sequence:
  - OFS FSDF 8.0.6.1.0
  - OFS REG REP USFED 8.0.9.5.1
  - OFS DM 8.0.6.1.0
- For **8.0.9.0.1 DG** Upgrade, ensure to install the following applications in the same sequence:
  - OFS FSDF 8.0.9.2.0
  - OFS REG REP USFED 8.0.9.5.1
  - OFS DM 8.0.9.0.1
- After installing OFS DGUSRR 8.0.6.1.0 or 8.0.9.0.1 version, perform the following steps:
  - Download and install OFS AAI Pack 8.1.0.0.0.
  - Download and execute OFS FSDF Upgrade Utility (p30812072\_81000\_Generic.zip).
  - Execute OFS [USFED Pre-scripts](#) in both atomic and config schema after replacing `##INFODOM##`.
  - Upload FSDF 8.1.0.1.0 Data Model from UI (Using sliced Model Upload Option).
  - Select `UPLOAD_MODEL=0` (# 0 = If you have already performed Model Upload and want to skip model upload process) and install FSDF 8.1.0.0.0.
  - Select `UPLOAD_MODEL=0` (# 0 = If you have already performed Model Upload and want to skip model upload process) and install FSDF 8.1.0.1.0.
  - Install FSDF postscripts from FSDF Upgrade Utility.
  - Install FSDF 8.1.0.1.2 patch (32120541\_GENERIC.zip).
  - Upload DGS\_KI\_DataModel 8.1.0.0.0 from UI (Using Sliced Model Upload Option)
  - Install USFED 8.1.0.0.0.
- Execute the preinstall script [OFS\\_DGS\\_PREINSTALL\\_SEEDER.sql](#) before installing OFS DGUSRR 8.1.0.0.0

### 7.2 Upgrade Scenarios

This section includes the procedures for the various upgrade scenarios supported by OFS DGUSRR Release 8.1.0.0.0.

**ATTENTION**

Always ensure that you run the upgrade installer only on the cloned environment.

Table 11: OFS DGUSRR Release 8.1.0.0.0 Upgrade Scenarios

Scenario	Upgrade Instructions
<p><b>Upgrade an already installed 8.0.6.1.0 or 8.0.9.0.1 application and install OFS DGUSRR of Release 8.1</b></p> <p><b>Example:</b> You have installed OFS DGUSRR from Release 8.0.6.1.0. Now you want to install OFS DGUSRR of Release 8.1.0.0.0.</p>	<ol style="list-style-type: none"> <li>1. <a href="#">Clone</a> your existing environment to the 8.1.0.0.0 <a href="#">OFS Analytical Applications Technology Matrix</a>.</li> <li>2. Update the <code>Silent.props</code> file for the sections related to the newly licensed applications.</li> <li>3. Trigger the Release 8.1.0.0.0 installer. This process upgrades the existing applications and installs the newly licensed application.</li> </ol>

## 7.3 Prepare for Upgrade

Before you plan to install or upgrade any of your Applications to Release 8.1.0.0.0, ensure that all the Applications in your current OFSAA instance are available for download and installation in the Release 8.1.0.0.0 version. Contact [My Oracle Support](#) for more information about the 8.1 release details for the required applications.

### NOTE

- The user profile executing the installation must have permission on `/tmp` before installation.
- Enough space must be available in `/tmp` before installation, else the installation terminates, without log files.

1. [Download](#) and [Extract](#) the OFS DGUSRR Application installer kit.
2. See the [OFS Analytical Applications Technology Matrix](#) for the hardware and software required to upgrade to the OFS DGUSRR Application Release 8.1.0.0.0.
3. Enable unlimited cryptographic policy for Java.  
For more information, see the *Enabling Unlimited Cryptographic Policy* section in the [OFS Analytical Applications Infrastructure Administration Guide](#).
4. Clone your environment.  
For more information, see the [Clone your Existing Environment](#) section.

## 7.4 Download the OFSAAAI Applications Pack Installer and Mandatory Patches

To download the OFSAAAI Applications Pack Installer Release 8.1.0.0.0, follow these steps:

1. Log in to the [Oracle Software Delivery Cloud](#) (OSDC) with a valid Oracle account.
2. Download the installer archive and copy (in Binary mode) to the download directory that exists in the OFSAAAI installation setup.

### NOTE

Select the required archive files for either Solaris SPARC or Linux based on the operating system of your OFSAAAI.

3. Log in to [My Oracle Support](#), search for the **33663417** Mandatory Patch in the **Patches & Updates** Tab and download it.

**ATTENTION**

On the 10th of December 2021, Oracle released Security Alert CVE-2021-44228 in response to the disclosure of a new vulnerability affecting Apache Log4J prior to version 2.15. The application of the **33663417** Mandatory Patch fixes the issue.

For details, see the My Oracle Support Doc ID [2827801.1](#).

Ensure that you reapply the **33663417** Mandatory Patch whenever you install or upgrade the application or apply an incremental patch.

## 7.5 Upgrade from OFS DGUSRR v8.0.6.1.0 or v8.0.9.0.1 version to OFS DGUSRR v8.1.0.0.0

You are upgrading the OFS DGUSRR Application from the Release v8.0.6.1.0 or v8.0.9.0.1 versions to the Release v8.1.0.0.0.

For example, you have installed OFS DGUSRR from Release 8.0.6.1.0. Now you want to install OFS DGUSRR of Release 8.1.0.0.0.

**NOTE**

If upgrading OFS DGUSRR Application from a version before OFS DGUSRR v8.1.0.0.0, first upgrade to OFS DGUSRR v8.0.6.1.0 or v8.0.9.0.1 versions. To upgrade to OFS DGUSRR v8.0.6.1.0 or v8.0.9.0.1 versions, see the corresponding version-specific [OFS Data Governance Installation and Configuration Guide](#).

## 7.6 Clone Your Existing Environment

Clone your existing environment to the v8.1.0.0.0 [OFS Analytical Applications Technology Matrix](#). For more information, see the OFSAA Cloning Reference Guide for:

- [Release 8.1.x](#): If you are upgrading from OFS DGUSRR Release 8.0.6.1.0 or v8.0.9.0.1 to OFS DGUSRR version 8.1.0.0.0.

## 7.7 Update the Silent.props File in Release 8.1.0.0.0 Application

This section is for the fresh installation of OFS DGUSRR Release 8.1.0.0.0.

1. In the installer kit path `/appsLibConfig/conf`:
  - For RDBMS installation, rename the `Silent.template` file to `Silent.props`. Edit the `Silent.props` file.
2. Modify only the following parameters:

**Table 12: Parameters for the Silent.props File**

Property Name	Description of Property	Permissible values	Comments
LOG_MODE	Mode for logging	1 = Debug 0 = General	# Default; LOG_MODE: 0
INFODOM_NAME	Specify the name of Information Domain (infodom)	Example: INFODOM_NAME=DGSINFO	# Specify the name of Information Domain (Infodom) into which you wish to install
SEGMENT_1_CODE	Segment Code	Example: DGSSEG	# Mandatory Segment Code should not exceed 10 characters and there should not be special characters or extra spaces
APPFTP_LOG_PATH	Information Domain Maintenance log path (to be created) for the new Information Domain for App Layer	Example: /ftpshare/DGSINFO/logs	# Mandatory if this an App Layer Installation and want to create a new Information Domain
DBFTP_LOG_PATH	Information Domain Maintenance log path (to be created) for the new Information Domain for DB Layer	Example: /ftpshare/DGSINFO/logs	# Mandatory if this an App Layer Installation and want to create a new Information Domain
UPLOAD_MODEL	Whether you want to perform Model Upload	0 = No 1 = Yes	# Mandatory
MODEL_TYPE	Released data model or Customized data model	0 = released 1 = customized	# Mandatory only in the case of UPLOAD_MODEL=1
DATAMODEL	The file name for the customized data model	Not Applicable	# Mandatory only in the case of uploading the customized data model # Option selected for MODEL_TYPE=1
DM_DIRECTORY	The path for the customized data model	Not Applicable	# Mandatory only in the case of uploading the customized data model # Option selected for MODEL_TYPE=1
ETL_APPSRC_TYPE	The ETL application name	0 = New Pair 1 = Existing	# Mandatory ETL_APPSRC_TYPE=0 ETL_APPSRC_TYPE=1
ETL_SRC_1_NAME	ETL FSDF Staging Source Name	Example: STAGING	# Mandatory ETL_SRC_1_NAME=STAGING
ETL_SRC_1_DESC	ETL FSDF Staging Source Description	Example: STAGING	# Mandatory ETL_SRC_1_DESC=STAGING

Property Name	Description of Property	Permissible values	Comments
ENABLE_CONCURRENCY	#Support for Parallelism	0 = No 1 = Yes	#Optional ENABLE_CONCURRENCY=1
CONCURRENCY_LEVEL	#Support for Parallelism	Example: CONCURRENCY_LEVEL=10 , which means 10 threads are triggered to handle the processing of fsapps.	#Optional

## 7.8 Trigger the Upgrade Installation

You are upgrading the OFS DGUSRR Application from Release 8.0.1.0.0 or later to Release 8.1.0.0.0.

For example, you have installed OFS DGUSRR from Release 8.0.6.1.0. Now you want to install OFS DGUSRR of Release 8.1.0.0.0.

**ATTENTION** Before you begin the installation, configure and execute the Silent.props. For more information, see the [Configure the Silent.props File](#).

To install the OFS DGUSRR Application v8.1.0.0.0, follow these steps:

1. Log in to the system as a non-root user.
2. Navigate to appsLibConfig and then open Conf folder.
3. Rename the Silent.template to Silent.props.
4. Edit the Silent.props with the required configurations.
5. Navigate to OFS\_DGS/bin and execute Setup.sh.
6. Enter the following command in the console to execute the OFS DGUSRR Application installer with the Silent option.

```
./setup.sh SILENT
```

**Figure 13: Execute the OFS DGUSRR installer in the SILENT mode**

```
Host specific info (below) - you can modify contents of /etc/motd_hostinfo as needed to update data:

.profile executed
/scratch/dgaapp>cd /scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin
/scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin>ls
installer.properties mediaPack.tar.gz nohup.out Setup.sh
/scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin>./Setup.sh SILENT
/scratch/dgaapp/kit/8100/DG_FINAL/OFS_DGS/bin
loading from /scratch/dgaapp/kit/8100/DG_FINAL/appsLibConfig/conf/Silent.props
etlAppSrcType->1
Source Name->DMSRC
Number of sources->1
Shutdown of OFSAAI services started...
Shutdown of OFSAAI services done.
Starting OFSAA Service...
OFSAA Service - OK
```

- The OFS DGUSRR Application installation begins.

**Figure 14: OFS DGUSRR Application Starting Installation and Installation Complete**

```
Starting installation...
***** Starting installation of OFS_DGS ~~ OFS_DGS ~~ 8.1.0.0.0 *****
----- DB Scripts Execution Started-----
----- DB Scripts Execution Completed-----
-----Uploading Data model into application schema-----
[DynamicServiceManager][GlobalParameters.ISWEB]false
erwinXMLPath for [DGSINFO] is [/scratch/dqaapp/ftpshare//DGSINFO/erwin/erwinXML]
----- DB Scripts Execution Started-----
----- DB Scripts Execution Completed-----
----- DB Scripts Execution Started-----
----- DB Scripts Execution Completed-----
===== APP INSTALLATION COMPLETED . =====
----- KINDLY REFER LOG FILE FOR MORE INFORMATION -----
Installation Completed...
```

- The following message is displayed in the console:  
*Installation completed...*
- The OFSAA Infrastructure installation performs a post-install health check automatically on the successful installation of the product.
- To verify if the release is applied successfully, check the log files mentioned in the [Verify the Log File Information](#) section.
- Perform the steps mentioned in the [Post-installation](#) section.

## 7.9 Verify the Log File Information

See the following logs file for more information:

- The `OFS_DGS_installation.log` file in the `OFS_DGS/logs`

## 7.10 Deployment Activities

Perform the following deployment activities:

- [Deploy](#) the EAR or WAR files.
- Add the following tags in the `weblogic.xml` in both the application layer and deployed location:

```
<prefer-application-packages>
<package-name>org.codehaus.jackson.*</package-name>
</prefer-application-packages>
<prefer-application-resources>
<resource-name>org.codehaus.jackson.*</resource-name>
</prefer-application-resources>
```

- In case you are using a Weblogic environment and if the User Interface does not appear, perform the following steps:
  - Comment the following lines in `web.xml` of an application server and WebLogic server.

```
<!-- <servlet>
```



```

 <servlet-name>InboxServlet</servlet-name>
 <servlet-
class>com.ofs.erm.dgs.inbox.servlet.InboxServlet</servlet-class>
 <load-on-startup>2</load-on-startup>
 </servlet> -->
<!-- <servlet-mapping>
 <servlet-name>InboxServlet</servlet-name>
 <url-pattern>/InboxServlet</url-pattern>
 </servlet-mapping> -->

```

- b.** Navigate to the WebLogic console and remove the installed application and regenerate the application.
  - c.** Restart the servers both application and WebLogic servers.
4. In case, you are deploying in tomcat environment, comment the following tags in the `web.xml` in the deployed area and then restart the servers.

```

<filter>
<filter-name>struts2</filter-name>
<filter-
class>org.apache.struts2.dispatcher.ng.filter.StrutsPrepareAndExecut
eFilter</filter-class>
</filter>
<filter>
<filter-name>struts-cleanup</filter-name>
<filter-
class>org.apache.struts2.dispatcher.ng.filter.StrutsPrepareFilter</f
ilter-class>
</filter>
<filter-mapping>
<filter-name>struts2</filter-name>
<url-pattern>/glreconciliation/*</url-pattern>
<url-pattern>/fsapps/*</url-pattern>
</filter-mapping>
<filter-mapping>
<filter-name>struts-cleanup</filter-name>
<url-pattern>/fsapps/*</url-pattern>
<url-pattern>/glreconciliation/*</url-pattern>
</filter-mapping>

```

## 7.11 Post-installation Steps

Follow the steps mentioned in the [Post-installation Steps](#) section.

## 7.12 View OFSAA Product Licenses after Installation of Application Pack

In an integrated environment, where you have multiple applications installed on the same domain or infrastructure, OFSAAI allows you to see the other licensed applications through the UI. For more information, see the *View OFSAA Product Licenses after Installation of Application Pack* in the [OFS Analytical Applications Infrastructure User Guide Release 8.1.0.0.0](#).

# Part III

**Topics:**

- [Additional Configurations](#)
- [FAQs](#)

## 8 Additional Configuration

This section provides information for additional configuration required for the OFS DGUSRR Application.

You can use this Additional Configuration checklist to have a glance at everything that you need to do before installing this application. The link provided in each step takes you to a section either within this document or to another referenced document.

**NOTE** See the *Additional Configuration* section in the [Additional Information](#) chapter to complete these procedures.

**Table 13: Additional Configuration Checklist**

Sl. No.	Additional Configuration Activity
1	<a href="#">Configure</a> the Web Server.
2	<a href="#">Configure</a> the Resource Reference in web application servers.
3	<a href="#">Configure</a> the Work Manager in the web application servers.
4	<a href="#">Add</a> FTP/SFTP Configuration for File Transfer.
5	<a href="#">Configure</a> the Infrastructure Server Memory.
6	<a href="#">Change</a> IP or Hostname, Ports, Deployed Paths of the OFSAA Instance.
7	<a href="#">Execute</a> the OFSAAI Setup Information Fetching Tool.
8	<a href="#">Execute</a> the Encryption Changer.
9	<a href="#">Configure</a> the Infrastructure LDAP Configuration.
10	<a href="#">Configure and deploy</a> the OFSAAI web services.
11	<a href="#">Enable</a> the Parallel Execution of DML statements.
12	<a href="#">Configure</a> the Message Details in the Forms Designer.
13	<a href="#">Clear</a> the application cache.
14	<a href="#">Configure</a> password changes.

---

## 9 **Frequently Asked Questions (FAQs) and Error Dictionary**

For FAQs and installation error-related information, see the section [Frequently Asked Questions \(FAQs\) and Error Dictionary](#) in the [OFS AAI Release 8.1.0.0 Installation and Configuration Guide](#).

## OFSAA Support

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

## Send Us Your Comments

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- Did you find any errors?
- Is the information clearly presented?
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