# Oracle Financial Services Data Governance for North America Regulatory Reporting

## Installation and Configuration Guide

**Release 8.1.2.0.0**

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**ORACLE**

Oracle Financial Services Financial Services Data Governance for North America 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-2022 | Created the document with instructions for the installation of the Oracle Financial Services Data Governance for North America Regulatory Reporting Release 8.1.2.0.0. |

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# 1 Preface

This section provides supporting information for the Oracle Financial Services Data Governance for North America Regulatory Reporting 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 Data Governance for North America Regulatory Reporting 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 AAAI Application**:

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- *OFS Advanced Analytical Applications Infrastructure (OFS AAAI) 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. |
| *Italic* | 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**

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

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# Part I

**Topics:**

- Pre-installation
- Installation
- Post-installation

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# 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**



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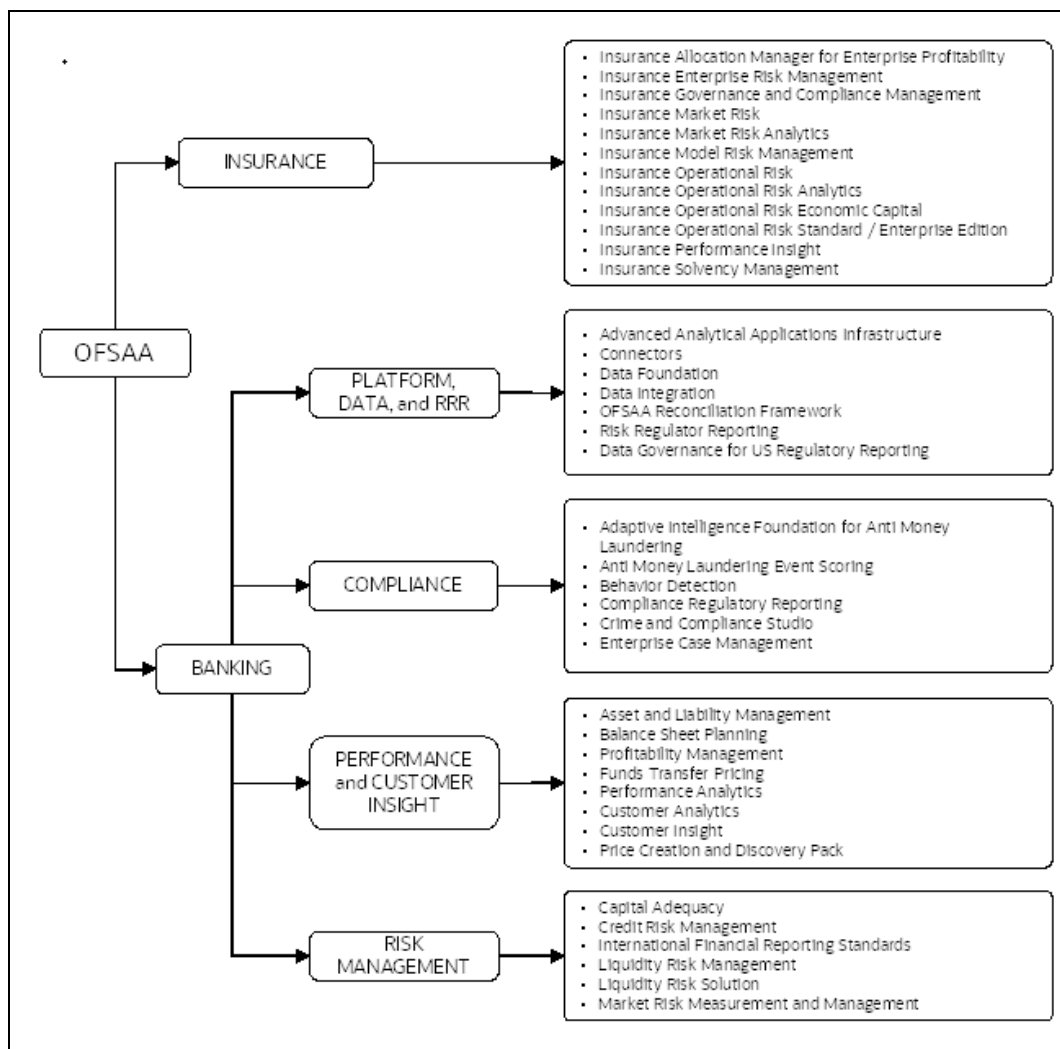
## 2.1 Oracle Financial Services Analytical Applications Infrastructure (OFS AAI)

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**
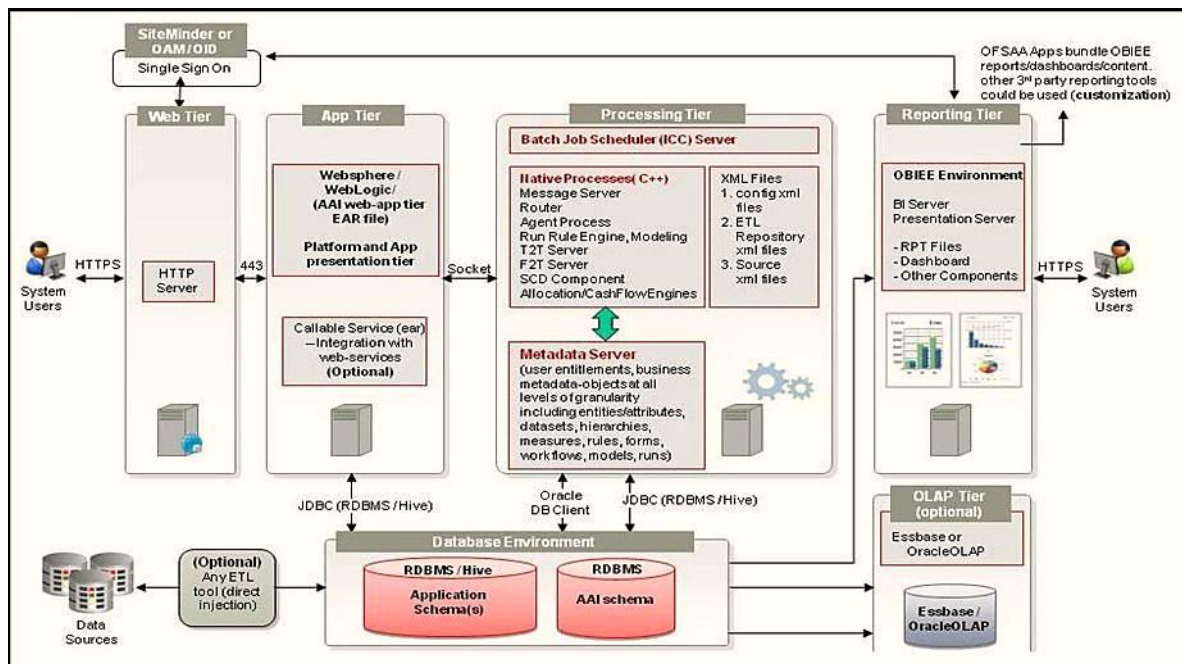


### 2.1.2 OFSAA Infrastructure High Availability

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.

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## 2.1.3    Deployment Topology

The following figure illustrates the deployment topology of OFSAA Applications.

**Figure 3: Logical Architecture Implemented for OFSAA Applications**
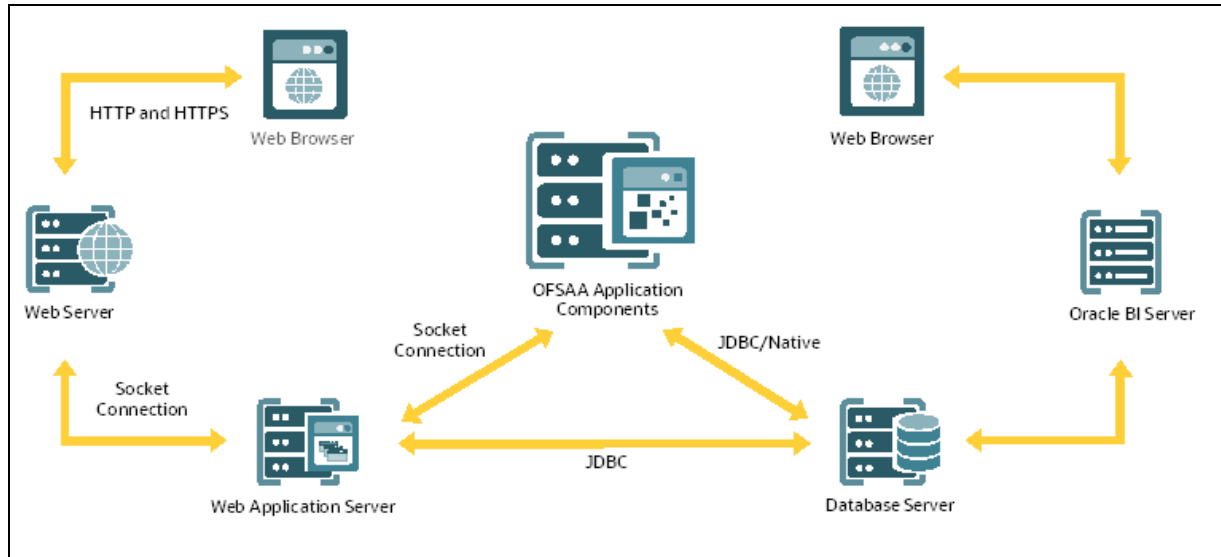


## 2.2    About the OFS Data Governance for North America Regulatory Reporting Application

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

- **Oracle Financial Services** Data Governance for North America Regulatory Reporting**:** Oracle Financial Services Data Governance for North America Regulatory Reporting operationalizes the Data Governance Process. The OFS Data Governance for North America Regulatory Reporting enables financial institutions to map multiple data sources to a standard, common business glossary. Oracle Financial Services Data Governance for North America 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 Data Governance for North America Regulatory Reporting Application 8.1.2.0.0 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 Data Governance for North America Regulatory Reporting Application 8.1.2.0.0 instance.

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| NOTE | This installer supports both upgrade and fresh installation of OFS Data Governance for North America Regulatory Reporting 8.1.2.0.0. |
|------|---|

**Figure 4: Installation Flow**
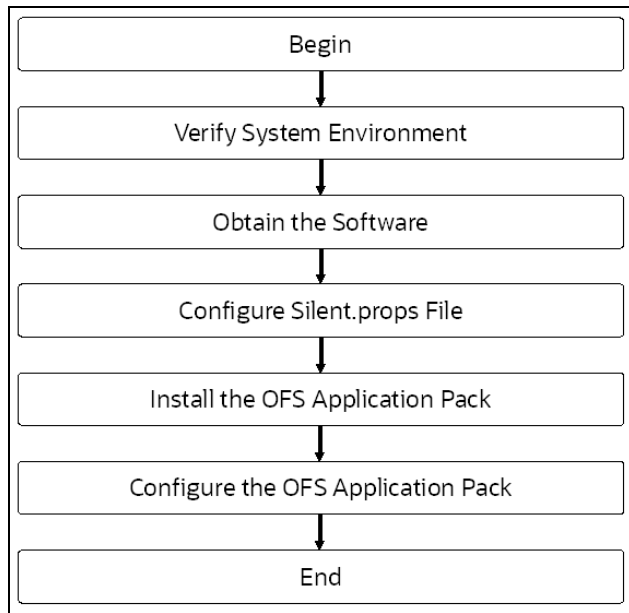


## 2.4 Installation and Upgrade Scenarios

Release v8.1.2.0.0 of OFS Data Governance for North America Regulatory Reporting 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 Data Governance for North America Regulatory Reporting Release 8.1.2.0.0 Installation and Upgrade Scenarios**

| Scenario | Installation and Upgrade Instructions |
|---|---|
| **New Installation** | |
| **Installing Release 8.1.2.0.0 application for the first time (new installation).** Or **Install OFS Data Governance for North America Regulatory Reporting Application v8.1.2.0.0 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. | 1. Prepare for the Installation. 2. Configure Silent.props 3. Install the OFS DGUSRR Application. 4. Perform Post Installation Activities. |

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| Scenario | Installation and Upgrade Instructions |
|---|---|
| **Example**:<br><br>OFS FSDF is already installed and now you want to install OFS Data Governance for North America Regulatory Reporting.<br><br>Or<br><br>OFS FSDF is already installed, now you want to install OFS USFED and then install OFS Data Governance for North America Regulatory Reporting.<br><br>**Note**: In case, you plan to install USFED, ensure to install US FED and then install DG. | |

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# 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 | Install all the prerequisite hardware and software as per the OFS Analytical Applications Technology Matrix. <br> • Configure the Database Instance Settings. <br> • Install and configure the Web Application Server. <br> • Configure the HTTP Settings on the Webserver. <br> • Configure the following Operating System and File System Settings. <br> • 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 Data Governance for North America Regulatory Reporting Application Installer Kit. |

| Sl. No. | Installation Activity |
|---------|-----------------------|
| 1 | Configure the `Silent.props` file. |
| 2 | Trigger the OFS Data Governance for North America Regulatory Reporting 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. |

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| Sl. No. | Post-installation Activity |
|---------|----------------------------|
| 12 | Run Chart for Batch Executions. |
| 13 | Rerun Account Mapper Batch. |
| 14 | Integrating AgileREPORTER with Data Governance Variance Analysis. |

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# 4 Pre-installation

This section contains the pre-installation requirements to install the OFS Data Governance for North America Regulatory Reporting 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 | Install all the prerequisite hardware and software as per the OFS Analytical Applications Technology Matrix. <br> • Configure the Database Instance settings. <br> • Install and configure the Web Application Server. <br> • Configure the HTTP Settings on the Webserver. <br> • Configure the following Operating System and File System Settings. <br> • 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 Data Governance for North America Regulatory Reporting 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 North America Regulatory Reporting Application is qualified, see OFSAA Technology Matrix.

> **NOTE**    OFS Data Governance for North America Regulatory Reporting 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 8.1.2.0.0.

### 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.

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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 Data Governance for North America Regulatory Reporting Application, create the following directories:

- **OFS Data Governance for North America Regulatory Reporting Download Directory (Optional)**: Create a download directory and copy the OFS Data Governance for North America Regulatory Reporting 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 Data Governance for North America Regulatory Reporting Application.

### 4.3.1    Download the Data Governance for North America Regulatory Reporting Pack Installer

To download the OFS Data Governance for North America Regulatory Reporting Pack Installer Release v8.1.2.0.0, follow these steps:

1. Log in to My Oracle Support. In the **Patches and Updates** Tab, search for the Patch ID **34064090**.under the tab.

   - To perform a simple search using the **Number/Name or Bug Number (Simple)**, type the Patch ID (**34064090**) in the Patch Name or **Number** Field.

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- To perform an advanced search using the **Product or Family (Advanced)** Name, type the Product Name (Oracle Financial Services Data Governance for North America Regulatory Reporting Pack) in the Product Field, and then select the **Release** Number.

2. Click **Search**.

3. Download the installer archive and copy (in Binary Mode) to the download directory in the setup identified for OFS Data Governance for North America Regulatory Reporting Pack installation.

4. Download the following Erwin Data Models from My Oracle Support:

   - OFS Data Governance for North America Regulatory Reporting erwin data model for 2019 R1 Version: Patch ID **34213128.**

   - OFS Data Governance for North America Regulatory Reporting erwin data model for 2020 R2 Version: Patch ID **34204248.**

## 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 Data Governance for North America Regulatory Reporting Release 8.1.2.0.0 installer archive file in the download directory with the following command:

```
unzip OFS_DGS_8.1.2.0.0_GENERIC.zip
```

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

```
chmod 755 appsLibConfig OFS_DGS DataModel
```

## 4.4.1 Prerequisites for Installation

This installer has fresh install capabilities, and the following is the prerequisite to install the OFS Data Governance for North America Regulatory Reporting:

- Ensure to install the OFS FSDF 8.1.2.0.0 in the OFSAA Instance for a fresh installation.

- Ensure that you install US Fed version 8.1.2.0.0 (applicable only if you are installing US Fed).

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# 5    Installation

This section details the steps you need to follow during the OFS Data Governance for North America Regulatory Reporting 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 `Silent.props` file. |
| 2 | Trigger the OFS Data Governance for North America Regulatory Reporting Application Installation. |

## 5.1    Configure the Silent.props file

This section is for the fresh installation of OFS Data Governance for North America Regulatory Reporting Release 8.1.2.0.0.

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 8: Parameters for the Silent.props File**

| Property Name | Description of Property | Permissible values | Comments |
|---------------|------------------------|--------------------|----------|
| LOG_MODE | Mode for logging | 1 = Debug<br>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<br>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 |

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| Property Name | Description of Property | Permissible values | Comments |
|---|---|---|---|
| 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 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 Data Governance for North America Regulatory Reporting Application

Installing Release 8.1.2.0.0 application for the first time (new installation).

OR

Install OFS Data Governance for North America Regulatory Reporting Application v8.1.2.0.0 on an Existing OFSAA Instance.

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You have already installed an application from release 8.1.x.0.0 and now you want to install another application from Release 8.1.2.0.0.

For example, OFS FSDF is already installed and you want to install OFS Data Governance for North America Regulatory Reporting or OFS FSDF is already installed, and you want to install OFS USFED and then install OFS Data Governance for North America Regulatory Reporting.

| NOTE | In case, you plan to install USFED, ensure to install US FED and then install Data Governance for North America Regulatory Reporting. |

| ATTENTION | Before you begin the installation, configure and execute the Silent.props file. See Configure the Silent.props File. |

To install the OFS Data Governance for North America Regulatory Reporting Application v8.1.2.0.0, 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 Data Governance for North America Regulatory Reporting Application installer with the Silent option.

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

**Figure 5: Execute the OFS Data Governance for North America Regulatory Reporting installer in the SILENT mode**



7. The OFS Data Governance for North America Regulatory Reporting Application Installation begins.

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**Figure 6: OFS Data Governance for North America Regulatory Reporting Application Starting Installation and Installation Complete**



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.

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# 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 | There are no specific steps applicable for the installation on ADW in OFSAA for OFS DGUSRR. However, if you need more information on ADW, see the *Installation Notes Specific to ADW* section in the FSDF 8.1.2.0.0. Installation and Configuration Guide. |

| NOTE | See the *Post-Installation* Section in the OFS AAI Release 8.1.2.0.0 Installation and Configuration Guide to complete these procedures. |

**Table 9: Post-installation Checklist**

| 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. |
| 13 | Rerun Account Mapper Batch. |
| 14 | Integrating AgileREPORTER with Data Governance Variance Analysis. |

## 6.1    Verify the Log File Information

See the following logs file for more information:

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

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## 6.2    Deploying Activities

Perform the following deployment activities:

1.  Deploy the EAR or WAR files.

2.  If 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.  If you are deploying in WebLogic Environment, remove or comment the followign entry in the `sun-jaxws.xml` file in both the Application Layers and in the deployed location:

    ```
    <endpoint
    implementation="com.ofs.erm.dgs.MDBBrowser.ws.MDBObjectExportWSImpl"
    url-pattern="/mdbObjectExportWsdl" name="mdbObjectExportWsdl"/>
    ```

4.  If 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>
    ```

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## 6.3 Start the DG Services

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

## 6.4 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 Data Governance for North America Regulatory Reporting 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:

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 |
| 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 |
| REGREPGRP | Regulatory Reporting Group | Regulatory Reporting Deployment |
| ISSASR | Issue Owner | Issue Owner |
| MDREDIT | DGS MDR Edit | MDR Edit |

| V_Role_code | V_role_name | V_role_desc |
|---|---|---|
| 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 |
| KIASSCONF | KI Assess Config Role | Key Indicator Assessment Configuration Role |
| KITHRSLD | KI Threshold Config Role | Key Indicator Threshold Role |
| CTLASSESSP | CTL ASSESS PARAMS Role | Control Assessment Parameters Role |
| DGAPPCONF | DGS Application Conf Role | DGS Application Configuration Role |
| DGSAPP | DGS APP Role | DGS Application Menu Role Code |

| 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. |
| | • Ensure the domains in the User Domains Map are mapped to the REGREPGRP group and SYSTEMADMIN group and assign them to the user. |
| | • Assign the DGAPPGRP group to the user. This is required for getting the DG Application Tiles menu. |

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

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— 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;
```

## 6.5     Regulatory Reporting Deployment Steps

This chapter provides information on deploying the reports based on the selected jurisdiction. It retains only the relevant report objects in the application, which are used in debugging the issues if any. This approach makes the deployment process intuitive and transparent to the banks. The product consists of the metadata and the objects of USFED and CANADA.

For more information, see the section *Regulatory Reporting Deployment* in the OFS Data Governance for North America Regulatory Reporting 8.1.2.0.0 User Guide.

## 6.6     Executing Scripts and Granting Permissions

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

1. Execute the following scripts in the Atomic Schema:

   a.  DGS_DIM_OR_STATUS.sql

   b.  DGS_DIM_OR_STATUS_MLS.sql

   c.  scd-380-dim_key_indicator-vw_key_indicator.sql

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2. Log into Config Schema and execute the following script:

   ▪ [DG81200_post_install_script.sql](DG81200_post_install_script.sql)

3. Execute the Grant command for the Dynamic KI batch in the Config Schema:
```
GRANT SELECT ON ##CONF_USER##.batch_task_precedence_master TO
##ATOMIC_USER##

##CONF_USER##--config schema name
##ATOMIC_USER##--atomic schema name
```

# 6.7    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 7: Batch Execution**
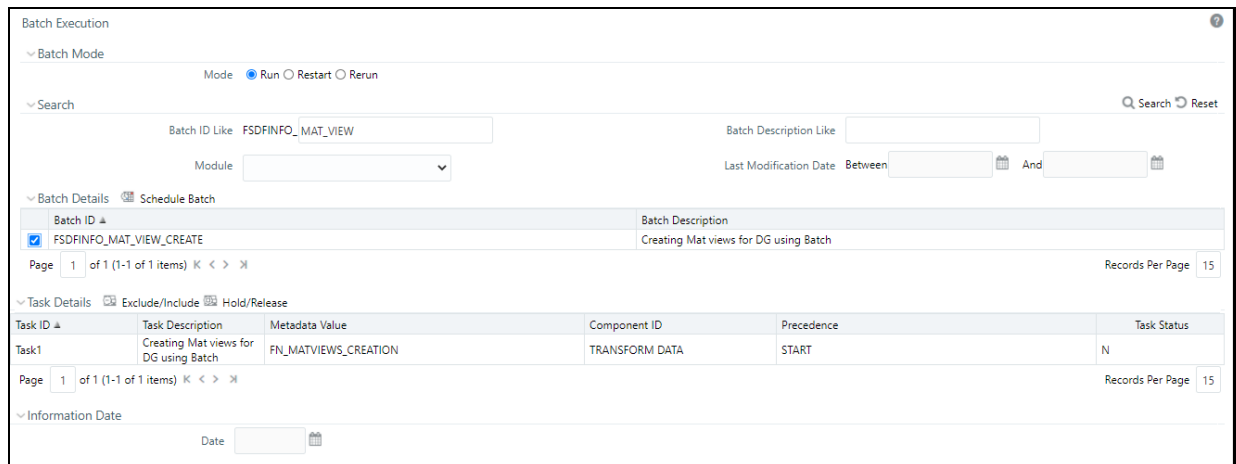


| NOTE | After materializing the View Creation Batch, run the following command in Atomic Schema to compile all the invalid objects in the Atomic Schema. |
|------|---|
| | Replace the ##ATOMIC_USER## with the actual Atomic Schema Name. |

```
begin

DBMS_UTILITY.compile_schema(schema =>
'##ATOMIC_USER##');

    end;

/
```

# 6.8    Merging Key Indicators

To merge the Key Indicators, follow these steps:

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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 8: Batch Execution**



## 6.9 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 8.1.2.0.0) is installed and configured.

- MDB Publish is performed for Oracle Financial Services Regulatory Reporting for US Federal Reserve 8.1.2.0.0.

| 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.**

**Figure 9: Process Monitoring Batch**

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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.

# 6.10    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 10: Batch Execution**

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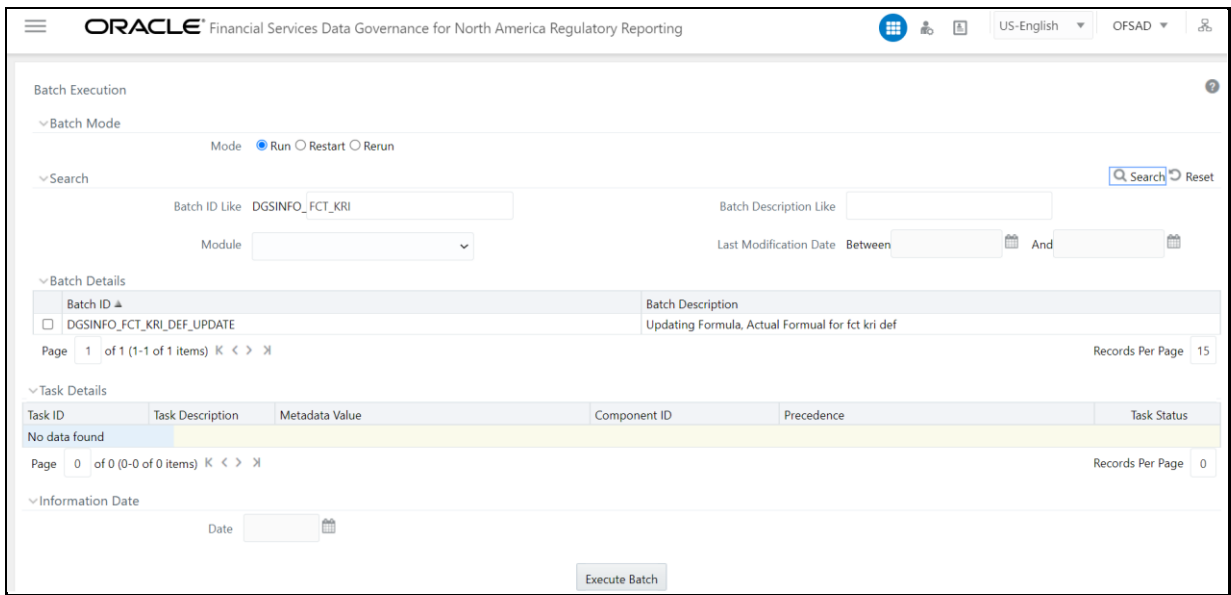
## 6.10.1    Updating MDRM Work Cell to Non-work MDRM

To update MDRM Work cell to Non-work MDRM, follow these steps:

1. From the Financial Services Data Foundation Window navigate to **Operations and select Batch Execution.**

2. Run the batch **##INFODOM##_ DGS_KI_MDRM_UPDATE** on Sysdate.
   This batch is used to update the MDRM work cell to non-work MDRM.

3. Enter the Current System Date as the **MISDATE** for this batch.

**Figure 11:** Batch Execution
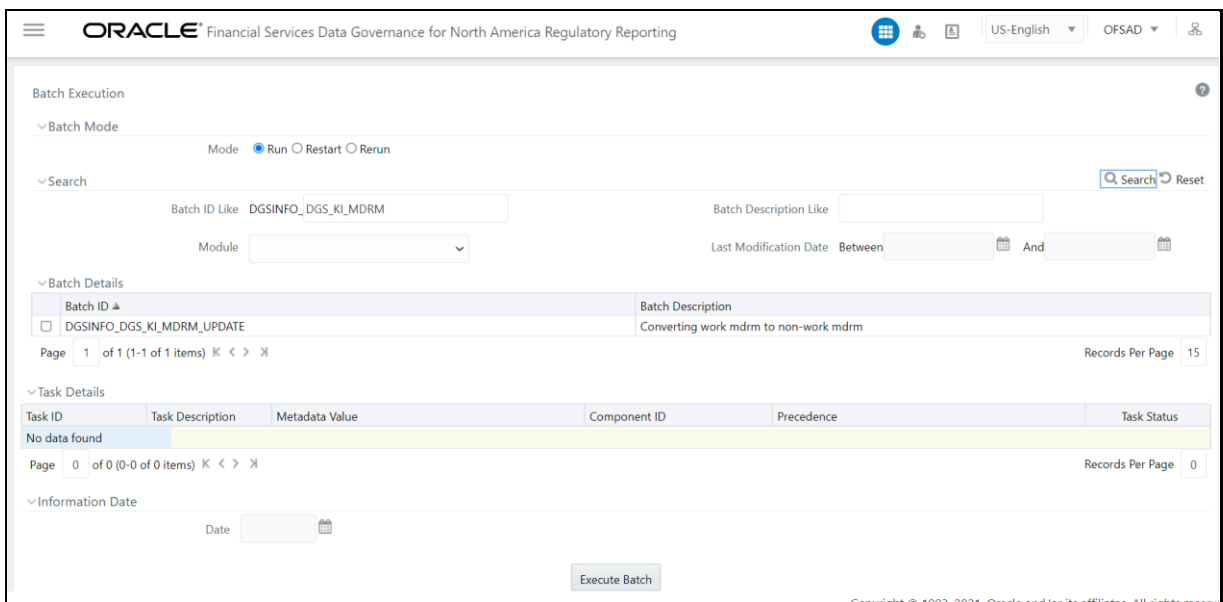
# 6.11    Key Indicator Configuration

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 Data Governance for North America Regulatory Reporting 8.1.2.0.0 User Guide.

**Figure 12: Batch Execution**
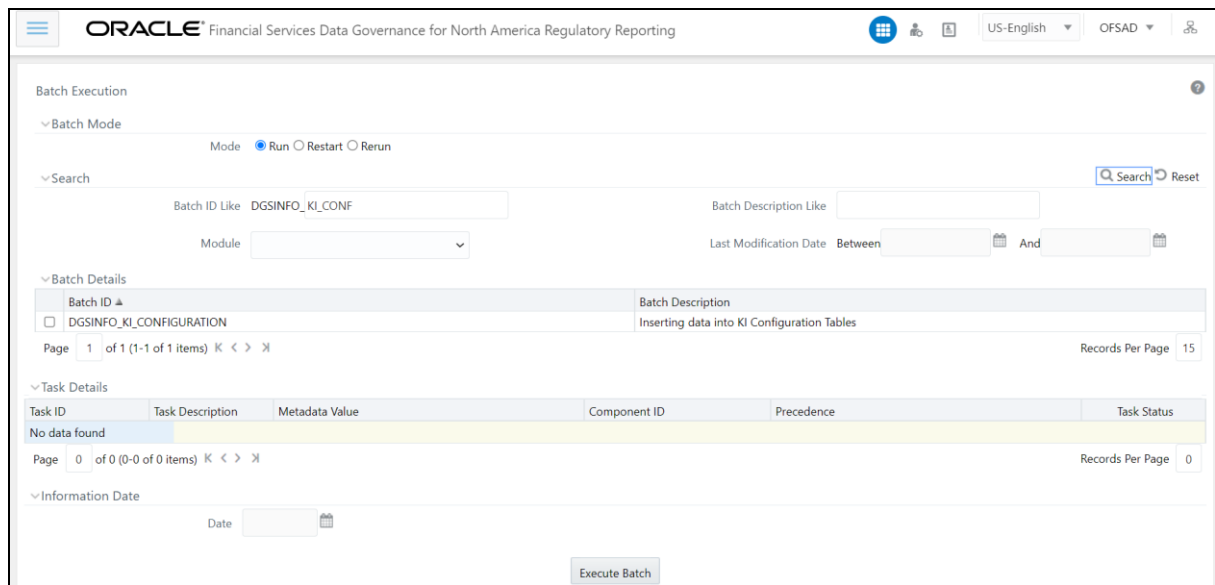


## 6.11.1    Creating DYNAMIC KI Tasks

To create the DYNAMIC KI tasks, follow these steps:

1.  From the Financial Services Data Foundation Window navigate to **Operations and select Batch Execution.**

2.  Run the batch **##INFODOM##_DYNAMIC_KI_BATCH_CREATION** on Sysdate.
    This batch is used to create the DYNAMIC KI Task.

3.  Enter the Current System Date as the **MISDATE** for this batch.

**Figure 13 Batch Execution**

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

All the Seeded Batches are created with SYSADMN 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 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.

   Go to the path where web.xml is available, and then add 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>
```

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

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)*/.

**Table 11: Performance Configuration Details**

| 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.

**Table 12: Performance Configuration Details**

| 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', _LOOKUP_CODE= ENABLE_PARALLEL_CONFIGS). The default value is set as 'N'.

**Table 13: Performance Configuration Details**

| 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', _LOOKUP_CODE= Enable STAR_TRANSFORMATION,

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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...

**Table 14: Performance Configuration Details**

| 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.

**Table 15: Performance Configuration Details**

| V_MODULE_NAME | V_LOOKUP_CODE | N_LOOKUP_VALUE | V_LOOKUP_CODE_DESC |
|---|---|---|---|
| MAPPER | TRUNCATE_PARTITION_FLAG | Y | Flag to truncate run skey wise partition |
| MAPPER | TRUNCATE_SUBPARTITION_FLAG | Y | Flag to truncate run skey 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'.

**Table 16: Performance Configuration Details**

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

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POST-INSTALLATION

OBIEE CONFIGURATION AND DEPLOYMENTS

| NOTE | All the mapper tables like 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_SERVICED, FSI_KICOND_LEGAL_ENTITY, , FSI_KICOND_CREDIT_LINE, FSI_KICOND_CAP_INSTRUMENT_DTLS, and FSI_KICOND_FIXED_ASSETS 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:

1. Login to the OBIEE Server.

2. Edit the `/Oracle_Home/bi/bifoundation/web/display/currencies.xml` file.

3. 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 Skey wise sub-partition is used.

**Table 17: Rerun Account Mapper Batch**

| V_MODULE_NAME | V_LOOKUP_CODE | N_LOOKUP_VALUE | V_LOOKUP_CODE_DESC |
|---|---|---|---|
| MAPPER | TRUNCATE_PARTITION_FLAG | Y | Flag to truncate Run skey wise partition |
| MAPPER | TRUNCATE_SUBPARTITION_FLAG | Y | Flag to truncate Run skey wise sub-partition |

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| 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_SERVICED
- FSI_KICOND_LEGAL_ENTITY
- FSI_KICOND_CREDIT_LINE
- FSI_KICOND_CAP_INSTRUMENT_DTLS
- FSI_KICOND_FIXED_ASSETS

## 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:

   a. **Name**: OFSAA Current Analysis

   b. **Linked to**: AgileREPORTER

   c. **URL Pattern**: Enter the following URL in the **URL Pattern** Text Box:

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###OBIEEURL###/analytics/saw.dll?dashboard&PortalPath=%2Fshared%2FDGS%2FAccou
nt%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=${cellId}&P4=eq&P5=%22Report%20Schedule%20Reporting%20Element%22.%2
2AR%20Form%20Code%22&P6=${formCode}&P7=eq&P8=%22Dim%20Dates%22.%22Dat
e%20Skey%22&P9=${referenceDate}&P10=eq&P11=%22Report%20Schedule%20Reportin
g%20Element%22.%22V_ENTITY_CODE%22&P12=${entityCode}

| **NOTE** | Ensure to replace the placeholder **###OBIEEURL###** with OBIEE Dashboard URL up to the Port Number. |
|---|---|

    d. **Description**: OFSAA Current Analysis

    e. **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%2FAccou
nt%20Level%20Reports%2FAccount%2FVariance%20Analysis%20Summary%20AR&page=
Variance%20Analysis%20AR&Options=rmf&Action=Navigate&P0=7&P1=eq&P2=ifnull(%22R
eport%20Schedule%20Reporting%20Element%22.%22Cell%20Id%20Bireport%22%2C%22
Report%20Schedule%20Reporting%20Element%22.%22Reporting%20Element%22)&P3=${
cellId}&P4=eq&P5=%22Report%20Schedule%20Reporting%20Element%22.%22AR%20For
m%20Code%22&P6=${formCode}&P7=eq&P8=%22Dim%20Dates%22.%22Date%20Skey%
22&P9=${referenceDate}&P10=eq&P11=%22Report%20Schedule%20Reporting%20Elemen
t%22.%22V_ENTITY_CODE%22&P12=${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.

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## 6.19 Alias Configurations

Update the `ActionFrameworkConfig.xml` file with the following aliases. If you do not find the following snippet in the file, then copy the following and paste into the file.

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

`/scratch//Oracle/Middleware/Oracle_Home/user_projects/domains/bi/confi`
`g/fmwconfig/biconfig/actions`

```
<aliases>
    <location-alias>
        <alias>ofsaa_dgs_obi</alias>
        <actual>##OBIEE URL##/analytics/saw.dll</actual>
    </location-alias>
    <location-alias>
        <alias>ofsaa_dgs</alias>
        <actual>##OFS AAI URL##/issues/add/<infodom name>/31</actual>
    </location-alias>
</aliases>
```

| NOTE | Ensure to replace the `##OBIEE URL##` and `##OFS AAI URL##` with the respective URLs. |
|------|------|

After updating the `ActionFrameworkConfig.xml` file, restart the OBIEE server.

## 6.20 Configuring Tomcat for User Group Authorization, Data Mapping, and Disabling WADL for the Web Service

Users with system authorization roles can access User Group Authorization. However, to make it available on Tomcat web server, you have to perform the following configuration steps:

1.  Navigate to the *$FIC_WEB_HOME/webroot/WEB-INF/* folder and open `web.xml` file.

2.  Enter the following in the `web.xml` file.

    ```
    <init-param>
        <param-name>mappedfile</param-name>
        <param-value>false</param-value>
    </init-param>
    ```

3.  To disable the WADL for the Web Service, navigate to the following snippet in the *web.xml* file.

    ```
    <servlet>
        <servlet-name>CommonRESTServlet</servlet-name>
        <servlet-class>org.glassfish.jersey.servlet.ServletContainer</servlet-class>
    ```

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```
<init-param>

<param-name>javax.ws.rs.Application</param-name>

<param-
value>com.ofs.fsapps.commonapps.util.ApplicationResourceConfig</param-
value>

        </init-param>

    <load-on-startup>1</load-on-startup>

</servlet>
```

4. Add the following snippet before the `<load-on-startup>1</load-on-startup>` attribute.

```
<init-param>

    <param-name>jersey.config.server.wadl.disableWadl</param-name>

    <param-value>true</param-value>

</init-param>
```

5. Save and close the file.

6. Re-start the application server.

## 6.21 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.

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# Part II

**Topics:**

- [Upgrade](#)

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# 7 Upgrade

This section includes the procedures for the various upgrade scenarios supported by OFS Data Governance for North America Regulatory Reporting Release 8.1.2.0.0.

## 7.1 Prerequisites for Upgrade

The minimum version of OFS Data Governance for North America Regulatory Reporting to install the OFS Data Governance for North America Regulatory Reporting Release 8.1.2.0.0 is OFS Data Governance for North America Regulatory Reporting Release 8.1.0.0.0.

## 7.2 Prepare for Upgrade

Before you plan to install or upgrade any of your Applications to Release 8.1.2.0.0, ensure that all the Applications in your current OFSAA Instance are available for download and installation in the Release 8.1.2.0.0 version. Contact My Oracle Support for more information about the 8.1.2.0.0 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 Data Governance for North America Regulatory Reporting Application Installer Kit.

2. See the OFS Analytical Applications Technology Matrix for the hardware and software required to upgrade to the OFS Data Governance for North America Regulatory Reporting Application Release 8.1.2.0.0.

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.

## 7.3 Upgrade from OFS Data Governance for North America Regulatory Reporting v8.1.0.0.0 to v8.1.2.0.0

You are upgrading the OFS Data Governance for North America Regulatory Reporting Application from the Release v8.1.0.0.0 to the Release v8.1.2.0.0.

For example, you have installed OFS Data Governance for North America Regulatory Reporting from Release 8.1.0.0.0. Now you want to install OFS Data Governance for North America Regulatory Reporting of Release 8.1.2.0.0.

## 7.4 Update the Silent.props File in Release 8.1.2.0.0 Application

This section is for the fresh installation of OFS Data Governance for North America Regulatory Reporting Release 8.1.2.0.0.

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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 18: Parameters for the Silent.props File**

| Property Name | Description of Property | Permissible values | Comments |
|---|---|---|---|
| LOG_MODE | Mode for logging | 1 = Debug<br>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<br>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<br>1 = Yes | # Mandatory |
| MODEL_TYPE | Released data model or Customized data model | 0 = released<br>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<br># 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<br># Option selected for MODEL_TYPE=1 |
| ETL_APPSRC_TYPE | The ETL application name | 0 = New Pair | # Mandatory |

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| Property Name | Description of Property | Permissible values | Comments |
|---|---|---|---|
| | | 1 = Existing | ETL_APPSRC_TYPE=0<br>ETL_APPSRC_TYPE=1 |
| ETL_SRC_1_NAME | ETL FSDF Staging Source Name | Example: STAGING | # Mandatory<br>ETL_SRC_1_NAME=STAGING |
| ETL_SRC_1_DESC | ETL FSDF Staging Source Description | Example: STAGING | # Mandatory<br>ETL_SRC_1_DESC=STAGING |
| ENABLE_CONCURRENCY | #Support for Parallelism | 0 = No<br>1 = Yes | #Optional<br>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 |

# 7.5    Trigger the Upgrade Installation

> **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 Data Governance for North America Regulatory Reporting Application v8.1.2.0.0, 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 Data Governance for North America Regulatory Reporting Application Installer with the Silent Option.

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

**Figure 14: Execute the OFS Data Governance for North America Regulatory Reporting installer in the SILENT mode**

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

.profile executed
/scratch/dgaaweb>cd /scratch/dgaaweb/kit/DG_81200/OFS_DGS/bin
/scratch/dgaaweb/kit/DG_81200/OFS_DGS/bin>ls
mediaPack.tar.gz  Setup.sh
/scratch/dgaaweb/kit/DG_81200/OFS_DGS/bin>./Setup.sh SILENT
/scratch/dgaaweb/kit/DG_81200/OFS_DGS/bin
loading from /scratch/dgaaweb/kit/DG_81200/appsLibConfig/conf/Silent.props
etlAppSrcType->1
Source Name->DMPSTAGING
Number of sources->1
Shutdown of OFSAAI services started...
```

7. The OFS Data Governance for North America Regulatory Reporting Application Installation begins.

**Figure 15: OFS Data Governance for North America Regulatory Reporting Application Starting Installation and Installation Complete**

```
Starting installation...
**************** Starting installation of OFS_DGS ~~ OFS_DGS ~~ 8.1.2.0.0 **************
---------------- 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...
```

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.

## 7.6     Verify the Log File Information

See the following logs file for more information:

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

## 7.7     Deployment Activities

Perform the following deployment activities:

1. Deploy the EAR or WAR files.

2. Add the following tags in the `weblogic.xml` in both the application layer and deployed location:

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```
<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 using a WebLogic environment and if the User Interface does not appear, perform the following steps:

   a. 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.

## 7.8    Post-installation Steps

Follow the steps mentioned in the Post-installation Steps Section.

## 7.9    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 8.1.2.0.0.

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# Part III

**Topics:**

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

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# 8 Additional Configuration

This section provides information for additional configuration required for the OFS Data Governance for North America Regulatory Reporting 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 19: Additional Configuration Checklist**

| Sl. No. | Additional Configuration Activity |
|---------|-----------------------------------|
| 1 | Configure the Web Server. |
| 2 | Configure the Resource Reference in Web Application Servers. |
| 3 | Configure the Work Manager in the Web Application Servers. |
| 4 | Add FTP/SFTP Configuration for File Transfer. |
| 5 | Configure the Infrastructure Server Memory. |
| 6 | Change IP or Hostname, Ports, Deployed Paths of the OFSAA Instance. |
| 7 | Execute the OFSAAI Setup Information Fetching Tool. |
| 8 | Execute the Encryption Changer. |
| 9 | Configure the Infrastructure LDAP Configuration. |
| 10 | Configure and deploy the OFSAAI Web Services. |
| 11 | Enable the Parallel Execution of DML Statements. |
| 12 | Configure the Message Details in the Forms Designer. |
| 13 | Clear the Application Cache. |
| 14 | Configure password changes. |

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# 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 AAAI Release 8.1.0.0.0 Installation and Configuration Guide.

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# OFSAA Support

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

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- Did you find any errors?

- Is the information clearly presented?

- Do you need more information? If so, where?

- Are the examples correct? Do you need more examples?

- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, indicate the title and part number of the documentation along with the chapter/section/page number (if available) and contact Oracle Support.

Before sending us your comments, you might like to ensure that you have the latest version of the document wherein any of your concerns have already been addressed. You can access the My Oracle Support site that has all the revised/recently released documents.

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