

Oracle Financial Services Profitability Application Pack Installation and Configuration Guide

Version 8.0.3.0.0



DOCUMENT CONTROL

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Executive Summary

This document includes the necessary instructions to apply 8.0.3.0.0 Minor Release for OFS Profitability Application Pack and perform the required post install configurations. You can find the latest copy of this document in [OTN Documentation Library](#).

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Preface

This document provides step-by-step instructions to install the OFS Profitability Application Pack 8.0.3.0.0 Minor Release.

This chapter discusses the following topics:

- [Audience](#)
- [How this Guide is Organized](#)
- [Recommended Environment](#)
- [Conventions and Acronyms](#)

Audience

Oracle Financial Services Profitability Application Pack Installation and Configuration Guide is intended for administrators, and implementation consultants who are responsible for installing and maintaining the application pack components.

Prerequisites for the Audience

The document assumes that you have experience in installing Enterprise components and basic knowledge about the following is recommended.

The following are the expected preparations from the administrator before starting the actual installation:

- Oracle Financial Services Profitability Application pack components
- OFSAA Architecture
- UNIX Commands
- Database Concepts
- Web Server/ Web Application Server

How this Guide is Organized

The Oracle Financial Services Profitability Application Pack Installation and Configuration Guide include the following topics:

- [OFS Profitability Application Pack Minor Release 8.0.3.0.0](#)
- [Appendix A](#)
- [Appendix B](#)
- [Appendix C](#)

- [Appendix D](#)
- [Appendix E](#)
- [Appendix F](#)

Recommended Environment

OFSAA applications have been tested with Microsoft Internet Explorer™, Google Chrome, and Mozilla Firefox browsers. For best viewing of OFSAA Application pages, set the screen resolution to a minimum resolution of 1024 x 768 pixels.

Related Documents

For more information, refer the Oracle Financial Services Profitability Application Pack 8.0.3.0.0 documents available in [OTN Documentation Library](#).

Conventions and Acronyms

Conventions	Description
Actions are indicated in Bold .	
Command or query is indicated in <code>Courier New</code> font.	
AIX	Advanced Interactive eXecutive
OFS AAI	Oracle Financial Services Analytical Applications Infrastructure
OFS PFT	Oracle Financial Services Profitability Management
OFS FTP	Oracle Financial Services Funds Transfer Pricing
OFS EFPA	Oracle Financial Services Enterprise Financial Performance Analytics
OFS IPA	Oracle Financial Services Institutional Performance Analytics
OFA RPA	Oracle Financial Services Retail Performance Analytics
RHEL	Red Hat Enterprise Linux
ML	Maintenance Level
R	Third-party open source software. Open source R is governed by GNU General Public License (GPL)
Oracle R Distribution	Oracle R Distribution is Oracle's free distribution of open source R
Oracle R Enterprise	Oracle R Enterprise integrates R, the open source scripting language and environment, with Oracle Database

1 OFS Profitability Application Pack Minor Release 8.0.3.0.0

This Minor Release of OFS Profitability Management Application Pack is cumulative and includes all enhancements and bug fixes done since the OFS Profitability Management Application Pack v8.0.0.0.0 release.

1.1 Pre Installation Requirements

- You should have OFS Profitability Management Application Pack version 8.0.0.0.0 as the minimum patch set level.
- The common app FPDF T2Ts gives a 'more than 1000 columns' error when it is executed on database version 12.1.0.2.0. To fix this error, the following patch needs to be applied:

Patch 19509982: DISABLE FIX FOR RAISING ORA-1792 BY DEFAULT

NOTE: You can refer to Technology Matrix, for Hardware and Software Requirements. OFS Profitability Application Pack 8.0.3.0.0 release qualifies on Java 7 and Java 8.

- OFS AAI Application Pack 8.0.3.0.0 installer update patch has been regularized with Bug 23251358-Object Registration is failing with duplicate Constraint Names. This has been bundled as a utility called Update Constraints utility and is executed as part of the 8.0.3.0.0 patch installation.
 - It is advised to take a backup of the atomic schema for each Information Domain in the OFSAA instance before applying the patch.
 - Model upload component follows a new naming convention for PK and FK constraints. The keyword PK/FK is appended with the unique ID of each table followed by a sequence at the end as required. For example, PK on DIM_ACCOUNT would be PK_101, where 101 is the unique ID of DIM_ACCOUNT (maintained in table AAI_TABLE_UID_MAP of Atomic Schema). Similarly, FKs on FCT_COMMON_ACCOUNT_SUMMARY would be FK_206_01, FK_206_02 and so on, where 206 is the unique ID generated for FCT_COMMOM_ACCOUNT_SUMMARY. So, refrain from using such constraint names in the same schema to avoid duplicity issues.
 - Execution of the utility is a memory intense process as the entire steps involved for performing a full model upload is carried out as part of the utility for each of the Infodom. The OFSAA installation server needs to have twice the allocated memory, which is assigned using parameter X_ARGS_APPS.
 - Utility creates three temporary tables- REV_TAB_CONSTRAINTS_U, REV_TAB_REF_CONSTRAINTS_U, and REV_TAB_CONSTRAINT_COLUMNS_U. If

the atomic schema has any of these tables already created for a different purpose, take a backup and drop/ rename.

- As in model upload process, for the applications that follow logical model upload like OFS_AML in BD pack, the utility does not play any role, since persistence of the model is outside the purview of the utility. Any similar cases, which involves only logical model upload should be considered and taken care by the user.

For more information about the utility execution and log files information, see the **Update Constraints Utility** section in [Oracle Financial Services Advanced Analytical Applications Infrastructure Pack Installation and Configuration Guide](#).

1.2 How to Apply This Minor Release?

1.2.1 Installing OFS Profitability Application Pack

NOTE: Ensure that ACL feature is not set during the installation.

Refer to the following instructions to download, extract, install, and configure this minor release.

1. Login to <https://support.oracle.com/> and search for **24653033** under the *Patches & Updates* tab.
2. Download the OFS Profitability Application Pack v8.0.3.0.0 archive file and copy it to your OFSAA server in **Binary** mode.

NOTE: The archive files are different for every operating system like AIX, Solaris, and RHEL/ Oracle Linux.

3. Login to the OFSAA Server.
4. Shut down all the OFSAAI Services. For more information, refer to the **Start/ Stop Infrastructure Services** section in [Oracle Financial Services Advanced Analytical Applications Infrastructure Application Pack Installation and Configuration Guide](#).

5. Execute the following command:

```
chmod -R 750 $FIC_HOME
```

6. If you have Unzip utility, skip to the next step. Download the Unzip utility (OS specific) and copy it in **Binary** mode to the directory that is included in your PATH variable, typically **\$HOME** path or directory in which you have copied the 8.0.3.0.0 installer.

- Uncompress the unzip installer file using the command:

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

NOTE: In case you notice an error message “**uncompress: not found [No such file or directory]**” when the package is not installed, contact your UNIX administrator.

- Give EXECUTE permission to the file using the command:

```
chmod 751 OFS_PFT_8.0.3.0.0_<OperatingSystem>.zip
```

7. Extract the contents of the 8.0.3.0.0 archive file using the command:

```
unzip -a <name of the file to be unzipped>
```

NOTE: The above “-a” option is mandatory to unzip the archive file. For example:

```
unzip_aix -a OFS_PFT_8.0.3.0.0_<OperatingSystem>.zip
```

8. Give EXECUTE permission to the minor release archive file. Navigate to the path *OFS_PFT_8.0.3.0.0_<OperatingSystem>.zip* and execute the command:

```
chmod 750 OFSAAIUpdate.sh
```

9. Update the parameters in *params.conf* file present in */OFS_PFT_PACK/OFS_PFT/conf/* directory. The update instructions are present in the file itself.

10. Execute **OFSAAIUpdate.sh** file using the following command.

```
./OFSAAIUpdate.sh
```

11. Verify the *Update.log* file located at

\$FIC_HOME/utility/UpdateConstraints/logs folder which is created by Update Constraint utility.

Execution status information of the utility is available against each Information domain. For success, “Update successful” message is displayed. If it is successful, verify the following references for new constraint names:

- *ftpshare/<INFODOM>/erwin/fipxml/<INFODOM>_DATABASE.xml*
- Constraint scripts under *ftpshare/<INFODOM>/erwin/scripts/table*
- Constraint scripts under *ftpshare/<INFODOM>/scripts*
- Object registration tables for constraints, *REV_TAB_CONSTRAINTS*, *REV_TAB_REF_CONSTRAINTS*, *REV_TAB_CONSTRAINT_COLUMNS*.
- Oracle Data Dictionary in respective atomic schema for each Infodoms.

If you encounter errors in the *Update.log* file, identify the failed Infodoms. Then troubleshoot and execute the standalone utility for the failed Infodoms. For more information on executing the update constraints utility, see the section **Update Constraints Utility** in [Oracle Financial Services Advanced Analytical Applications Infrastructure Pack Installation and Configuration Guide](#).

NOTE: If the infodom used in the current upgrade process is failing due to errors in Update Constraints Utility execution step, installer needs to be triggered again

after troubleshooting is done and the standalone utility is executed successfully for all the infodoms.

12. Secure your OFSAA Infrastructure. For more information, see the **Security Guide** in [OTN Documentation Library](#).
13. After successful installation, follow these steps:
 - Clear the application cache. Navigate to the following path depending on the configured web application server and delete the files.
 - **Tomcat:**
<Tomcat installation folder>/work/Catalina/localhost/<Application name>/org/apache/jsp
 - **Weblogic:**
<Weblogic installation location>/domains/<Domain name>/servers/<Server name>/tmp/_WL_user/<Application name>/<auto generated folder>/jsp_servlet
 - **Websphere:**
<Websphere installation directory>/AppServer/profiles/<Profile name>/temp/<Node name>/server1/<Application name>/<.war file name>
14. Add umask 0027 in the .profile of the UNIX account which manages the WEB server to ensure restricted access permissions.
15. Perform the necessary additional configuration as mentioned in the following sections:
 - [Appendix A](#)
 - [Appendix B](#)
 - [Appendix C](#)
 - [Appendix D](#).
16. Generate the application EAR/WAR file and redeploy the application onto your configured web application server. For more information on generating and deploying EAR / WAR file, refer to the **Post Installation Configuration** section in [Oracle Financial Services Profitability Management Application Pack Installation Guide Release 8.0.0.0.0](#).
17. After the successful installation of the release, restart all the OFSAAI services. For more information, refer to the **Start/ Stop Infrastructure Services** section in [Oracle Financial Services Profitability Management Application Pack Installation Guide Release 8.0.0.0.0](#).

1.3 Post Installation Configuration

1.3.1 Configure excludeURLList.cfg file

Configure `excludeURLList.cfg` file, follow these steps:

1. Locate the webserver deployed area `webroot/conf/excludeURLList.cfg` file.
2. Modify the following entries:
 - `[SQLIA] ./dataIntegrator/` to `[ALL] ./dataIntegrator/`
 - `[SQLIA] ./ETLExtractionServlet` to `[ALL] ./ETLExtractionServlet`
3. Save the changes and restart the webserver. Resave the definition.

Appendix A: Installation of R and Oracle R Enterprise (ORE)

This is an optional step and required only if you intend to use Term Structure Parameter Estimation functionality under Rate Management – Interest Rates, for computing term structure parameters. Both Funds Transfer Pricing and Asset Liability Management applications require term structure parameters for all monte carlo engine based calculations (OAS, VaR and EaR).

Following are the prerequisites:

- Install R and Oracle R Enterprise Server on the Oracle Database server. For more information, see https://docs.oracle.com/cd/E57012_01/doc.141/e57007.pdf
- ORE version supported - Oracle R Enterprise (Server) version 1.5

Configuration for Oracle R Enterprise

Grant the `RQADMIN` role to atomic schema.

You can grant the `rqadmin` role in SQL*Plus by logging in to the database with DBA privileges and provide the following privilege to Atomic Schema:

`RQADMIN` by executing the command:

```
GRANT RQADMIN TO < atomic_schema>;
```

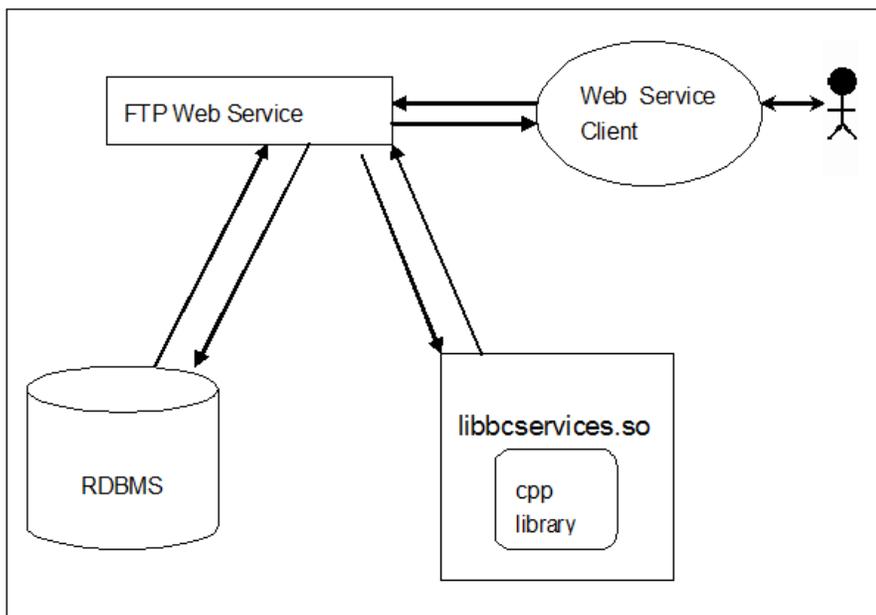
Appendix B: FTP Web Service Configuration

The following installation activity describes how to setup FTP web services to support the Breakage Charge Economic Loss calculation. The calculation logic is same as the FTP Adjustment Rule Breakage Charge calculation. This FTP Economic Loss WebService is now independent of EXEWebService. Note that other FTP web services are installed automatically and require no further setup.

Approach

The FTP Web services are designed as a wrapper which will call the FTP Engine for the calculation of Economic Loss. The FTP Web Service is available in its own context and has a specific WSDL for that context.

Architecture



Prerequisites

- For WebLogic and WebSphere, Datasource should be present with JNDI name as *jdbc/FTPWS*.
- For Tomcat a separate context entry should be present in `server.xml` file.

Log4j configuration

`log4j.properties` file is already present inside `WEB-INF/classes` folder of the war file. Logs will be generated inside `$root_directory_of_war/logs/webbservice.log` file.

Setup Environment variable - ofsaaws.properties

ofsaaws.properties file is available in *WEB-INF/classes* folder. Specify the `cpp_component` name. Place the component `libbcservices.so` under */ficdb/lib/libFSGBU*. Add the library location to `LD_LIBRARY_PATH`.

NOTE: If Webservices are deployed in an environment other than where OFSAA is deployed, then copy */ficdb/lib/libFSGBU* to webservices environment and set in `LIBRARY` path.

- `cpp_component=libbcservices.so(libbcservices.o)`----for AIX
- `cpp_component=bcservices` -----for Solaris
- `cpp_component=bcservices` -----for linux

Creating FTPWebServiceAXIS.war

1. Go to the server path in which the application is running.
For Example : `$FIC_HOME/FTPWebService`
2. Run "ant.sh" in this folder. `FTPWebServiceAXIS.war` will be created in the same folder.

Deploying FTPWebServiceAXIS.war

For Tomcat:

1. Copy the above WAR file to the webapps folder of apache tomcat directory.
2. Go to conf folder of apache tomcat and add a separate context entry in `server.xml` file with resource name as `jdbc/FTPWS`.

Example:

```
<Context path="/FTPWebServiceAXIS" docBase="/<Tomcat_webapps>
/FTPWebServiceAXIS" debug="0" reloadable="false"
crossContext="true">
  <Resource auth="Container"
    name="jdbc/FTPWS"
    type="javax.sql.DataSource"
    driverClassName="oracle.jdbc.driver.OracleDriver"
    username="username"
    password="password"
    factory="org.apache.tomcat.jdbc.pool.DataSourceFactory"
```

```
url="jdbc:oracle:thin:@db-ip:dp-port:dbname"  
maxActive="300"  
maxIdle="30"  
maxWait="10000"  
removeAbandoned="true"  
logAbandoned="true"/>  
removeAbandonedTimeout="600"  
</Context>
```

3. Restart the server.

For Weblogic and Websphere:

1. Deploy `FTPWebServiceAXIS.war` from admin console.
2. Create datasource for database connection with JNDI name as `jdbc/FTPWS`.
3. WSDL is present at following URL.

<http://ipaddress:port/FTPWebServiceAXIS/services/OFSAAFTPService?wsdl>

Appendix C - Deploying Profitability Pack Dashboards and Analytics

Installing OBIEE Server

To install Oracle Business Intelligence Enterprise Edition (OBIEE) server, refer to Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence 11g Release 1 (11.1.1.7.1 or 11.1.1.9.5). After installing Oracle Business Intelligence Enterprise Edition (OBIEE) server, get the Enterprise Manager URL, username, password, and OBIEE installed directory from the System Administrator.

NOTE: Once the OBIEE server is installed, it should be upgraded to the version as mentioned in the Environment section.

Installing OBIEE Windows Administration Client

To install OBIEE repository administration client for Windows machine, refer to Oracle® Fusion Middleware Installation Guide for Oracle Business Intelligence 11g Release 1 (11.1.1).

Disabling the Cache Feature in OBIEE Server

To disable the cache feature in OBIEE server, log in to the Enterprise Manager, and do the following:

1. Click Business Intelligence folder from left hand side menu and select coreapplication.

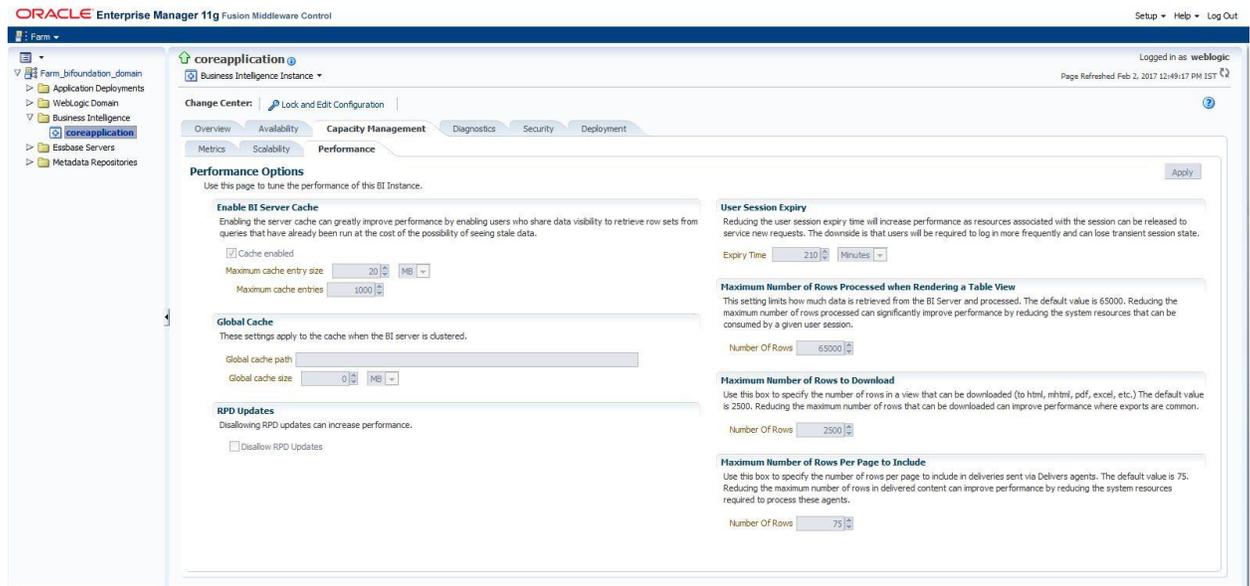


Figure 1: OBIEE Windows Administration Screen to Disable the Cache

2. Click on **Capacity Management** tab.

3. Select **Performance** tab.
4. Click **Lock and Edit Configuration** tab.
5. Uncheck the Cache Enabled option to disable the cache.

Deploying Profitability Pack Report Analytics

To deploy Analytic Reports, follow these steps:

1. Stop Oracle Process Manager and Notification Server (OPMN) services by executing the following command:

```
<OBIEE Installed Directory>/instances/instance1/bin./opmnctl stopall
```

2. Copy `OFS_PFT_PACK.rpd` from `$FIC_HOME/OFSPFTPACKBI/OBIEE11G` of Web layer to windows machine where the OBIEE windows administration client is installed.

NOTE: The RPD/ Catalog for version 7.1 and 9.5 are packaged within different folders in the installer.

3. To change the default password for the repository, follow these steps:
 - a. Open the repository using OBIEE Windows administration client.

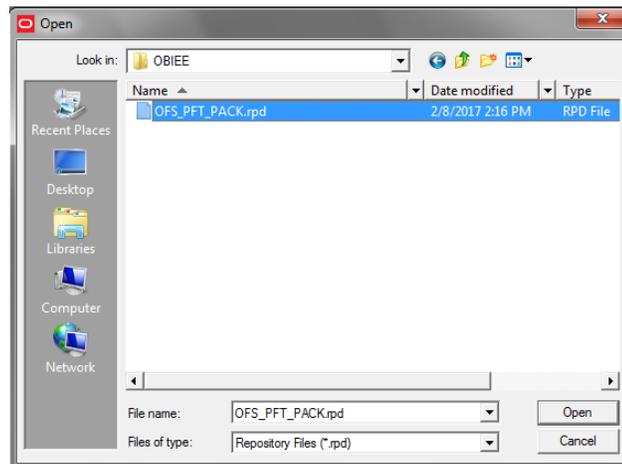


Figure 1: OBIEE Windows Administration Client to Open Repository

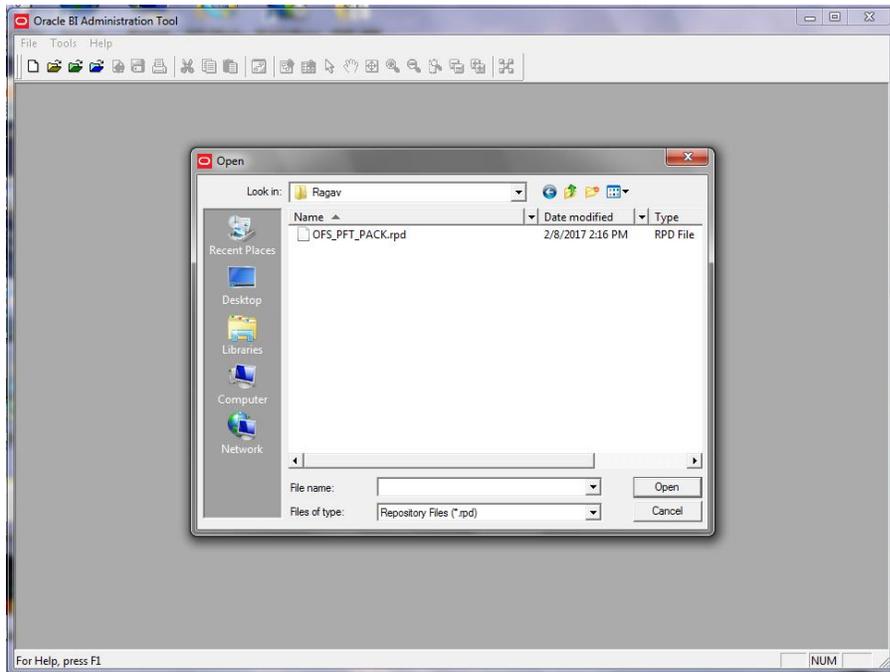


Figure 2: OBIEE Windows Administration Client to Select Repository from Windows Machine

b. Enter default repository password as Admin123.

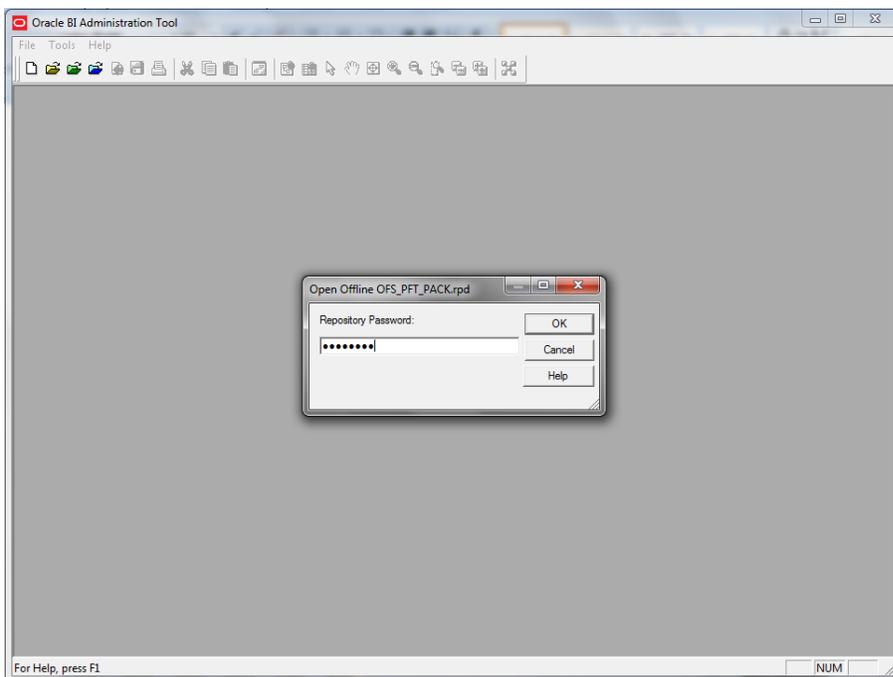


Figure 3: OBIEE windows Administration Client to enter Repository Default Password

c. Click **File** menu, select **Change Password**.

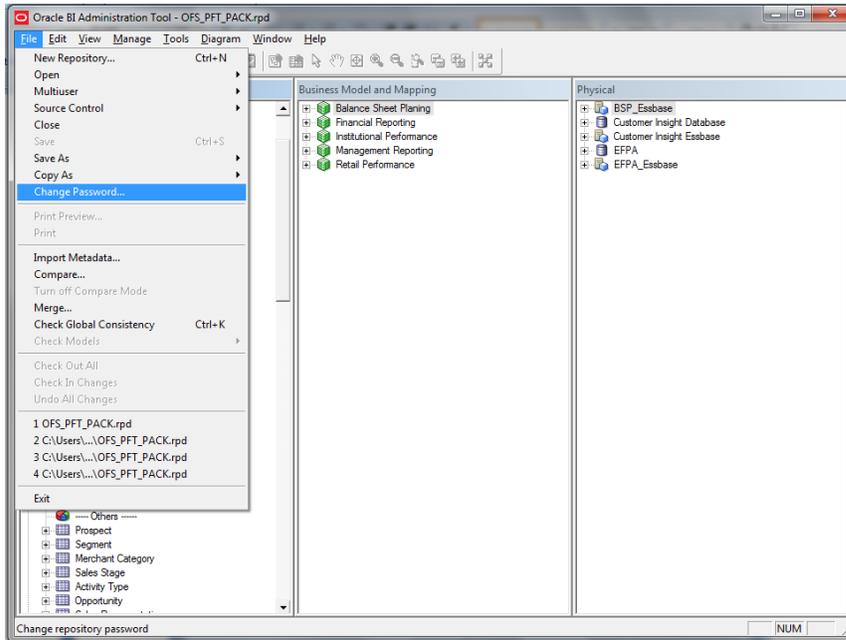
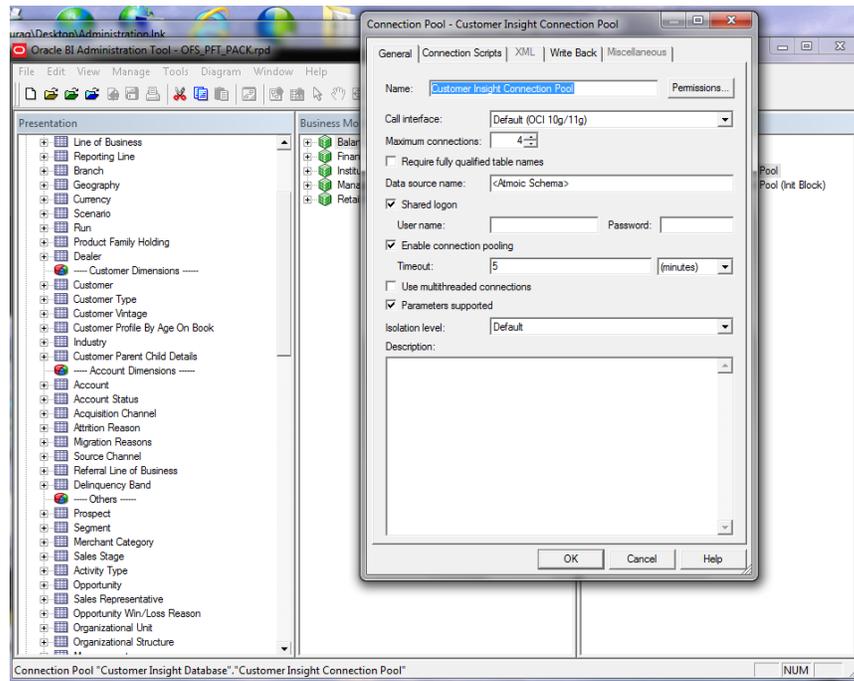


Figure 4: OBIEE Windows Administration Client to Change the Password of Repository

4. Enter the new password. Click **OK**.
5. To configure connection pool of repository, follow these steps:
 - a. In the physical section, expand 'Customer Insight Database' folder.



- b. Double-click 'Customer Insight Connection Pool' to open the Connection Pool Properties window.

- c. Enter the following in *Data Source Name* text box of Connection Pool Properties window after modifying:

<Database Server Host Name> and <Database Name>

```
(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP)(HOST=<Database Server HostName>)(PORT=1521))(CONNECT_DATA=(SERVER=DEDICATED)(SERVICE_NAME=<Database Name>)))
```

- d. Enter atomic schema user in **User name** text box.
- e. Enter atomic schema user password in **Password** text box.
- f. Click **OK**.

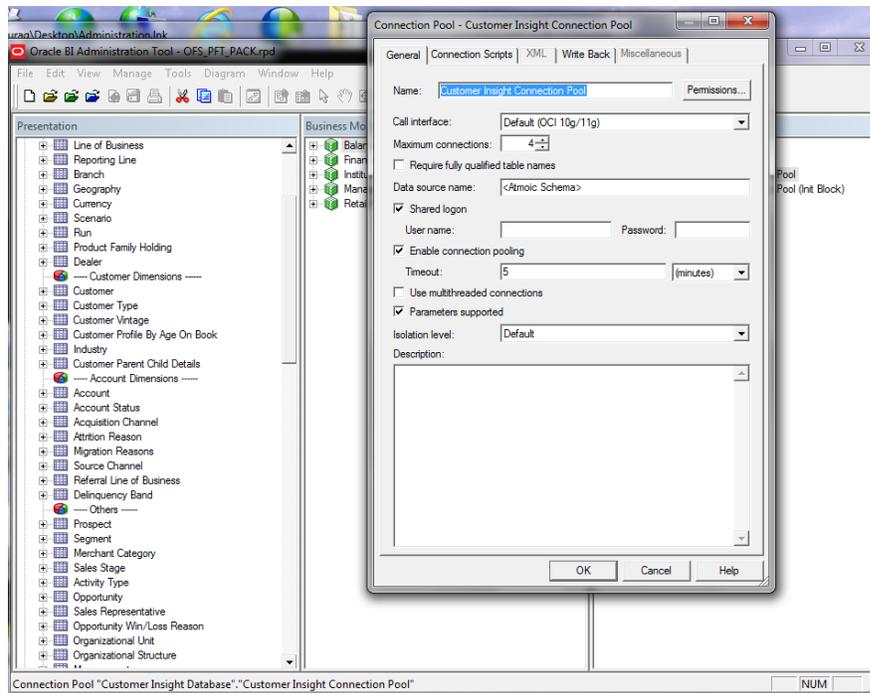


Figure 5: OBIEE Windows Administration Client to modify Connection Pool variables

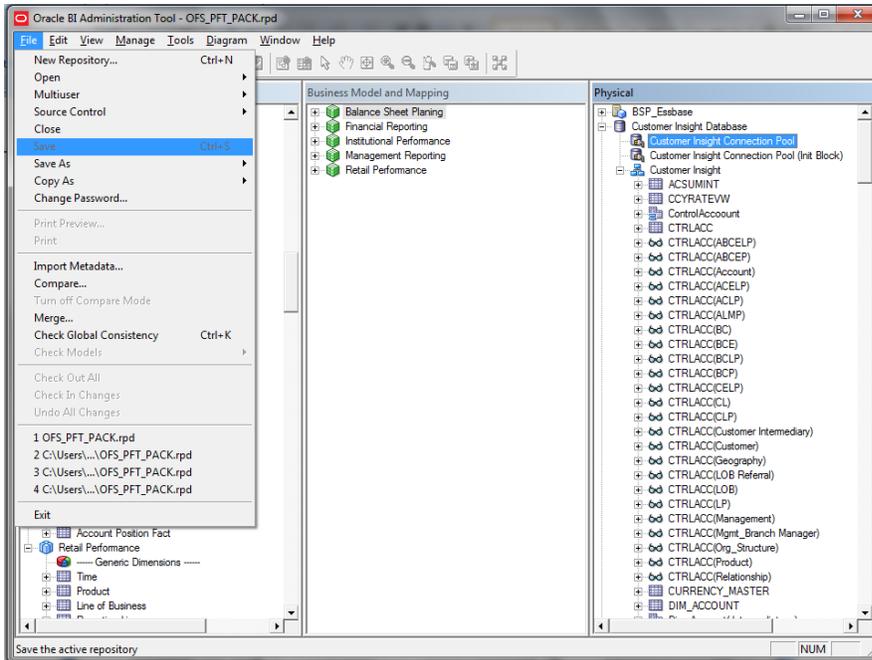
- g. Double-click 'Customer Insight Connection Pool (Init Block)' to open the Connection Pool window (Figure 8).
- h. Enter the following in Data Source Name text box of Connection Pool properties window,

< Database Server Host Name > and <Database Name>

```
(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP)(HOST=<Database Server HostName>)(PORT=1521))(CONNECT_DATA=(SERVER=DEDICATED)(SERVICE_NAME=<Database Name>)))
```

- i. Enter atomic schema user in **User name** text box.

- j. Enter atomic schema password in **Password** text box.
 - k. Click **OK**.
6. To configure connection pool for EFPA, modify 'OFSEFPA Connection Pool' and 'OFSEFPA Init Block' connection pool and set the property which is inside of 'EFPA' folder in the physical section.
7. Click **File** menu and then click **Save**.



- 8. Click **Yes** on the pop-up message “Do you want to check global consistency?”.

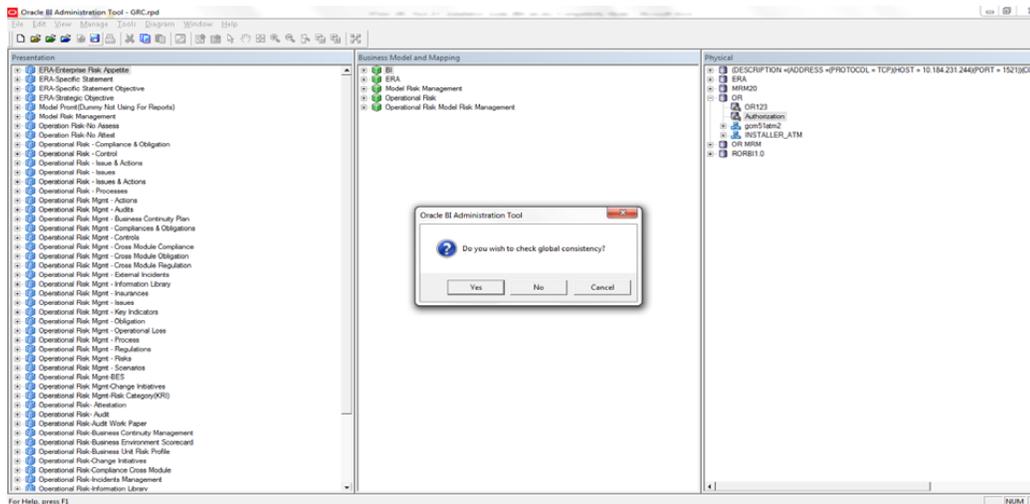


Figure 9: OBIEE Windows Administration Client to check global consistency

- Click **OK**, on the pop-up message Consistency check didn't find any errors, warning or best practices violations.

NOTE: Warnings on consistency check can be ignored.

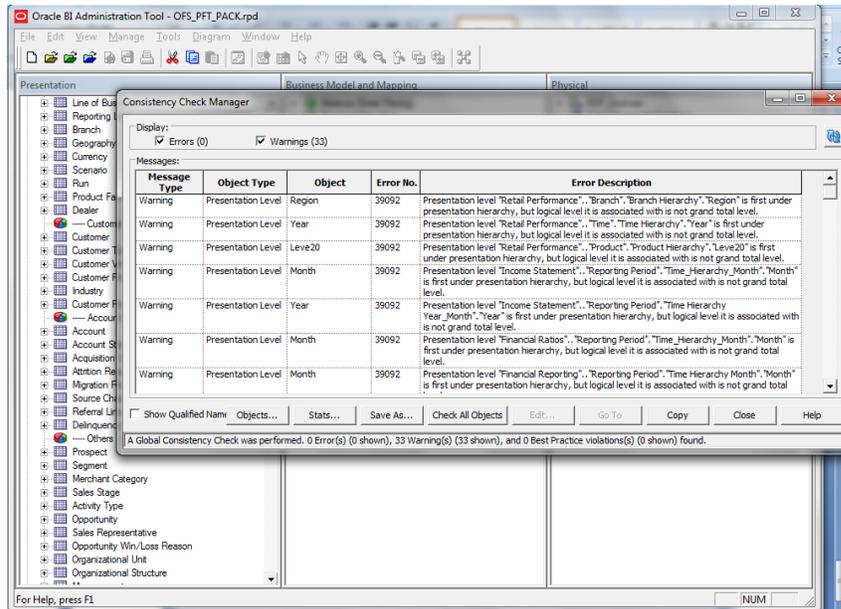


Figure 10: OBIEE Windows Administration Client with global consistency checking message

List of Warning Messages:

Business Model Financial Reporting:

[39090] Logical column "Financial Reporting"."Dim - Reporting Period"."Month" has invalid Sort Order column 'Month Sort'.

Business Model Management Reporting:

[39090] Logical column "Management Reporting"."Dim - Reporting Period"."Year" has invalid Sort Order column 'Year Calendar'.

GLOBAL:

[39092] Presentation level "Retail Performance".. "Branch". "Branch Hierarchy". "Region" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Retail Performance".. "Time". "Time Hierarchy". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Retail Performance".. "Product". "Product Hierarchy". "Leve20" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Income Statement".. "Reporting Period". "Time_Hierarchy_Month". "Month" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Income Statement".. "Reporting Period". "Time Hierarchy Year_Month". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Financial Ratios".. "Reporting Period". "Time_Hierarchy_Month". "Month" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Financial Reporting".. "Reporting Period". "Time Hierarchy Month". "Month" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Financial Reporting".. "Reporting Period". "Time Hierarchy Year_Month". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet".. "Reporting Period". "Time_Hierarchy_Month". "Month" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Financial Reporting".. "Reporting Period". "Time Hierarchy". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Institutional Performance".. "Time". "Time Hierarchy". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Financial Ratios".. "Reporting Period". "Time Hierarchy". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Income Statement".. "Reporting Period". "Time Hierarchy". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet".. "Reporting Period". "Time Hierarchy". "Year" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Account". "Account". "Gen2,Account" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Period". "Period". "Gen2,Period" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Years". "Years". "Gen2,Years" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Scenario". "Scenario". "Gen2,Scenario" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Entity". "Entity". "Gen2,Entity" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Version". "Version". "Gen2,Version" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Strategy". "Strategy". "Gen2,Strategy" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Chart of Account". "Chart of Account". "Gen2,Chart of Account" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "AttributeValue". "AttributeValue". "Gen2,AttributeValue" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Currency". "Currency". "Gen2,Currency" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Intercompany Entity Flag". "Intercompany Entity Flag". "Gen2,Intercompany Entity Flag" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "AssetClass". "AssetClass". "Gen2,AssetClass" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "COA type". "COA type". "Gen2,COA type" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet

Planing".. "DelinquenciesExp". "DelinquenciesExp". "Gen2,DelinquenciesExp" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Fee Classification". "Fee Classification". "Gen2,Fee

Classification" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Intercompany COA Flag". "Intercompany COA

Flag". "Gen2,Intercompany COA Flag" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "Sample COA". "Sample COA". "Gen2,Sample COA" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

[39092] Presentation level "Balance Sheet Planing".. "curr_attrib". "curr_attrib". "Gen2,curr_attrib" is first under presentation hierarchy, but logical level it is associated with is not grand total level

[39092] Presentation level "Institutional Performance".. "Segment". "Segment Hierarchy". "Type" is first under presentation hierarchy, but logical level it is associated with is not grand total level.

Deploying EFPA/ IPA/RPA Application Report Analytics

Use the following procedure to deploy the EFPA/ IPA/ RPA applications report analytics:

NOTE: Ensure that Oracle Business Intelligence version 11.1.1.7.1 or 11.1.1.9.5 is available.

1. Set the <Oracle BI Instance Home> directory> =>.\
For example: /u01/OBIEE11G/instances/instance1
2. Start Weblogic AdminServer.
 - a. Set the < BI Domain Home> directory> => e.g. /u01/OBIEE11G/user_projects/domains/bifoundation_domain.
 - b. Navigate to < BI Domain Home >/bin and run 'nohup ./startWebLogic.sh &'
 - c. Bringing up this service may take a few minutes depending on your environment. Check the logs using the command 'tail -f nohup.out'
3. Start Node Manager.
 - a. Set the < WebLogic Server Home > directory> => e.g. /u01/OBIEE11G/wlserver_10.3.
 - b. Navigate to <WebLogic Server Home>/server/bin and run
'nohup ./startNodeManager.sh &'.
4. Start Weblogic Managed Server(bi_server1).
 - a. Login onto <http://localhost:7001/console> using your Administrator credentials created during platform install (Replace the hostname based on your setup).
 - b. Under Environment block (mid of page, towards left side), click on Servers link.



- c. The bi_server1 line should show as shutdown state at this point.

<input type="checkbox"/>	Server ↕	Machine	State	Status of Last Action
<input type="checkbox"/>	AdminServer(admin)	laliv-lap	RUNNING	None
<input type="checkbox"/>	bi_server1	laliv-lap	SHUTDOWN	TASK COMPLETED

d. Click on control page tab.



e. Select the bi_server1 line by clicking on the left tick box,

f. Click start button at the top of the list and confirm starting this service.

Servers (Filtered - More Columns Exist)

Start Resume Suspend Shutdown Restart SSL

<input type="checkbox"/>	Server ↕	Machine	State
<input type="checkbox"/>	AdminServer(admin)	laliv-lap	RUNNING
<input checked="" type="checkbox"/>	bi_server1	laliv-lap	SHUTDOWN

Start Resume Suspend Shutdown Restart SSL

g. State will update to “RUNNING” mode after a few minutes.

5. Start BIEE services and login.

Starting services From EM screen:

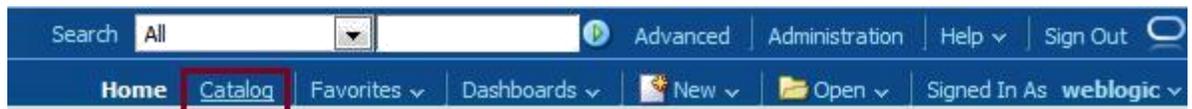
a. Login to the EM administration screen using the url <http://localhost:7001/em> (Replace the hostname and port number based on your setup). Use the login you created in BIEE installation to log in.

b. Expand 'Business Intelligence' node on the left and choose Coreapplication.

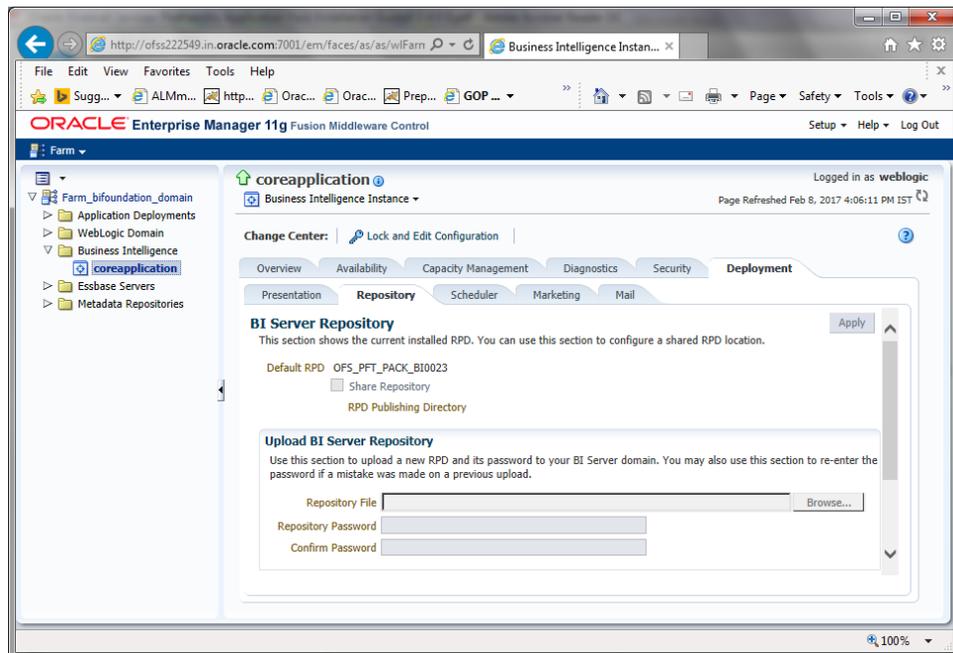
- c. Click on the **Overview** Tab,
- d. Click on blue button 'Restart' (or green button 'Start') under the Manage System category, middle of screen,
- e. Click yes on dialog box to confirm the move. Wait for message that confirms successful restart.

If starting using EM is not successful and complaining about OPMNCTL not up, follow the starting process with OPMNCTL.

- a. Open a command prompt, navigate to <Oracle BI Instance Home>/bin.
 - b. run `./opmnctl status`, this will show you status of all the OBIEE core services.
 - c. run `./opmnctl startall` or `./opmnctl stopall` depending on your need.
6. Deploy RPD and webcat file(s).
- a. Copy OFS_PFT_PACK.rpd from \$FIC_HOME/OFSPFTPACKBI/OBIEE11G of Web layer to windows machine where the OBIEE windows administration client is installed.
 - b. Login to OBIEE – Enterprise Manager URL (`http://<ip address>:<port>/em`).
 - Click on hyperlink 'coreapplication' from 'Business Intelligence' tab on left hand side.
 - Under 'coreapplication', select the tab 'Deployment' and in that select sub-tab 'Repository'.



- Click 'Lock and Edit Configuration' button located below title 'coreapplication'. Following screen is displayed.



c. RPD Deployment:

Select 'Browse' button available under 'Upload BI Server Repository' section and select OFS_PFT_PACK.rpd file from the local folder. Enter Repository password Admin123.

d. Web catalog Deployment:

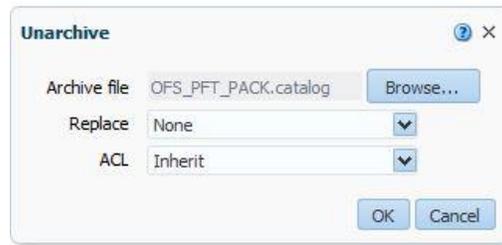
Open the analytics OBIEE URL-(<http://<ipaddress>:<port>/analytics>) and login with the credentials.

e. Click "Catalog" link available on the top right corner.

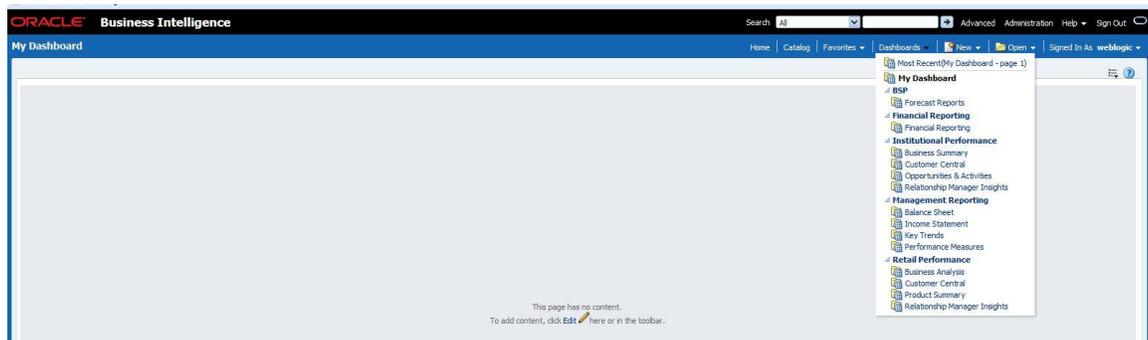
f. Click "Shared Folders" and then "Un-Archive".



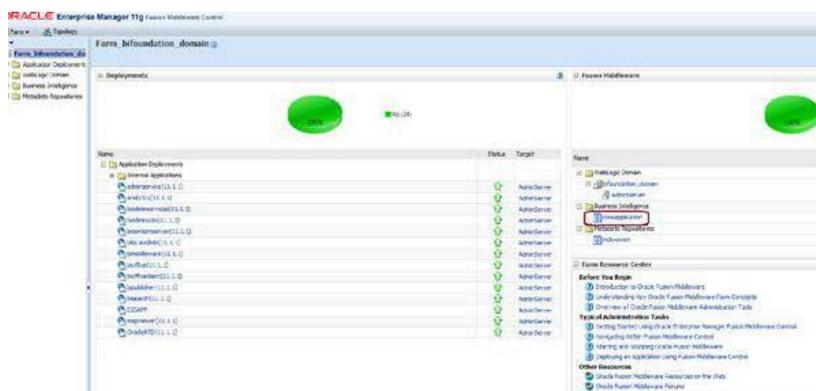
- g. Browse the path where “OFS_PFT_PACK.catalog” is copied in the local folder. Select the file and click “Open”. Then click “OK”.



- h. Click “Dashboard” and click on any of the reports to ensure that all the reports are available.



7. Follow the bellow steps to restart all services in OBIEE “Enterprise Manager”.
 - a. Open the EM OBIEE URL- (<http://<ipaddress>:<port>/em>) and login with the credentials.
 - b. Click the “coreapplication” link.

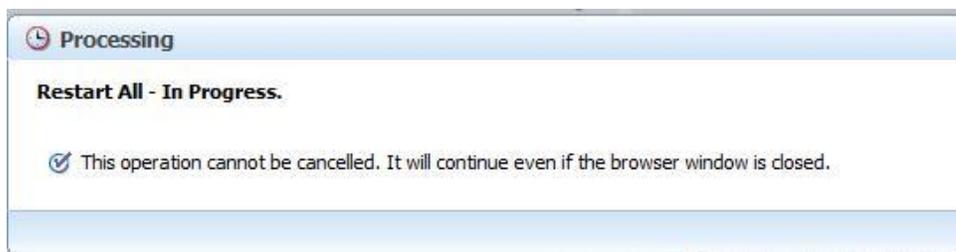


c. Click the “Restart” button.



d. Click “Yes” to restart all BI components.

A message is displayed as follows:



After restart is done, a confirmation message is displayed as follows:



8. Configure tnsnames.ora as follows:
 - a. Open "tnsnames.ora" file under the folder - <Oracle Home>/network/admin.
 - b. Make sure an entry is made in the tnsnames.ora to connect to atomic schema of OFSAA application.
 - c. Save the tnsnames.ora.
9. Configure ODBC data source to connect to Oracle BI Server as follows:
 - a. Go To Control Panel>Administrative Tools>Data Sources (ODBC).
 - b. Select the 'System DSN' tab and click 'Add' Button.
 - c. Select a driver specific to (Oracle BI Server 11g) and click 'Finish' Button.
 - d. Enter 'Name' and 'Server' details (Specify the Host Name or IP Address of the BI Server and click 'Next').
 - e. Enter Oracle BI Server login id and password (Enter User Name and Password created at the time of OBIEE installation). Click 'Next'.
 - f. Click 'Finish'.
10. Modify RDBMS connection pool and set the properties as follows:
 - a. Open the OBI Administration tool.
 - b. Select Start > Programs > Oracle Business Intelligence > BI Administration.
 - c. Select File > Open > Online and select 'OFS_PFT_PACK.rpd' file from the Open dialog box.
 - d. Enter Repository password as 'Admin123' to open it online.
 - e. In the "Physical" layer, double-click the "OFSEFPA Connection Pool" to open its properties.
 - f. Enter the following in Data Source Name text box of Connection Pool Properties window,


```

          <Database Server Host Name> and <Database Name>

          (DESCRIPTION= (ADDRESS= (PROTOCOL=TCP) (HOST=<Database Server Host
          Name>) (PORT=1521) ) (CONNECT_DATA= (SERVER=DEDICATED) (SERVICE_NAME=<Database Name>)))
          
```
 - g. User name: <enter atomic db user name>.
 - h. Password: <enter atomic db user password>.

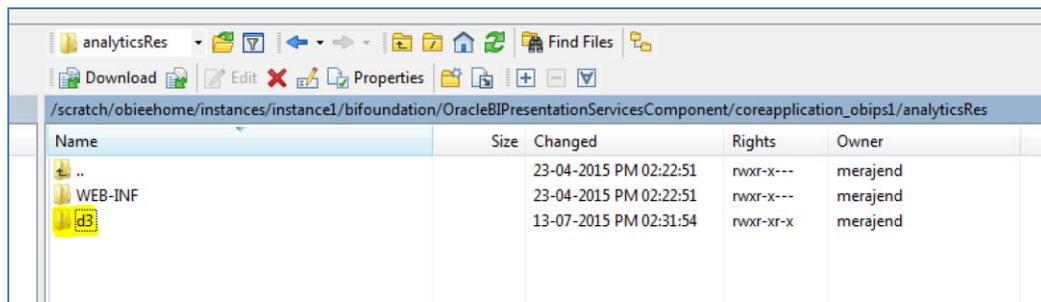
- i. Confirm password and Click 'OK' to close the window and click 'Save' to save the RPD file.
 - j. Click 'No' for the Global Consistency Message.
 - k. Repeat the steps from 9.f to 9.l to set the connection properties for "OFSEFPA Init Block".
 - l. Close the RPD file (File / Exit).
11. In case RPD deployment is done on Essbase, then modify ESSBASE connection pool and set the properties.

Appendix D - Steps for Deploying D3 to Entitlement Server

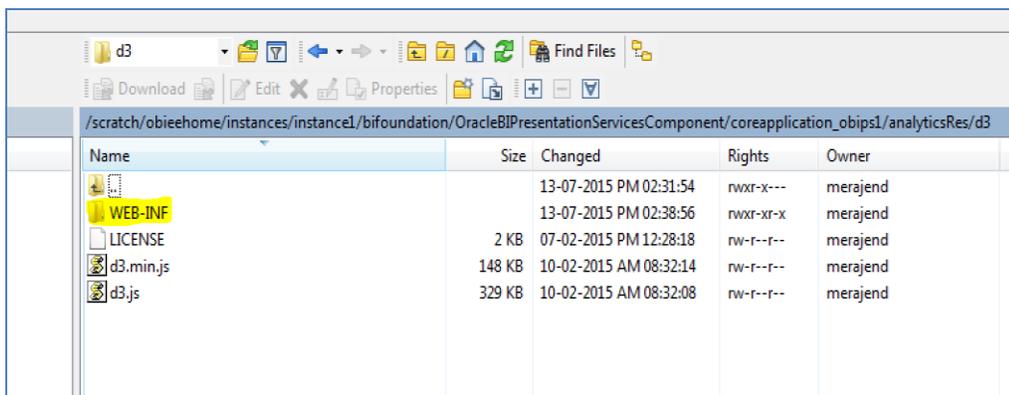
To deploy the D3 to entitlement server, do the following:

1. Download d3.zip of version 3.5 and place it in your local folder.
2. Unzip the d3 folder and move this to **analyticsRes** in your entitlement server.

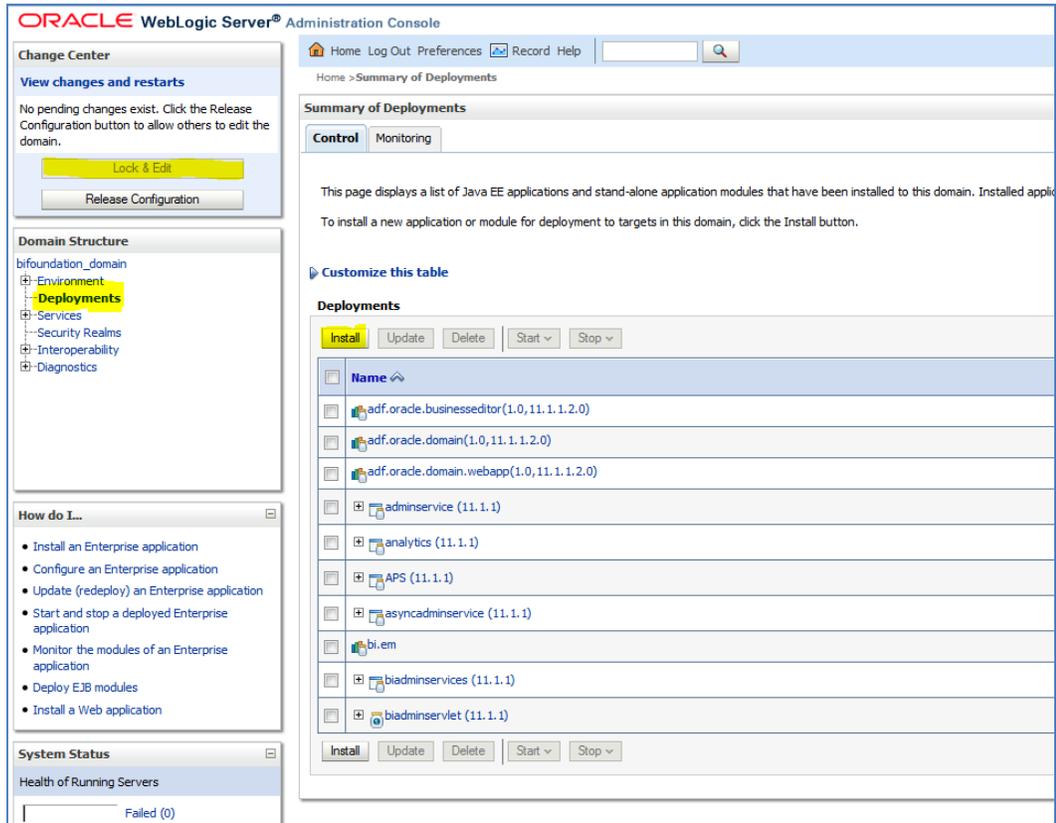
NOTE: To view the Customer Group Structure report, place the `hashmap.jsp` file in `d3` folder under **analyticsRes** and restart the application from Weblogic console. `hashmap.jsp` file is the part of Installer.



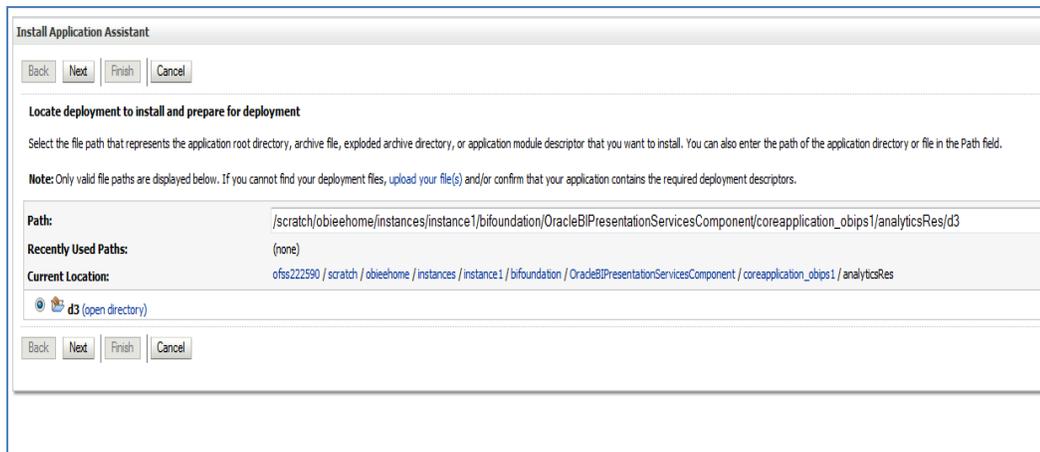
3. Copy the **WEB_INF** directory from **analyticsRes** into `d3` folder.



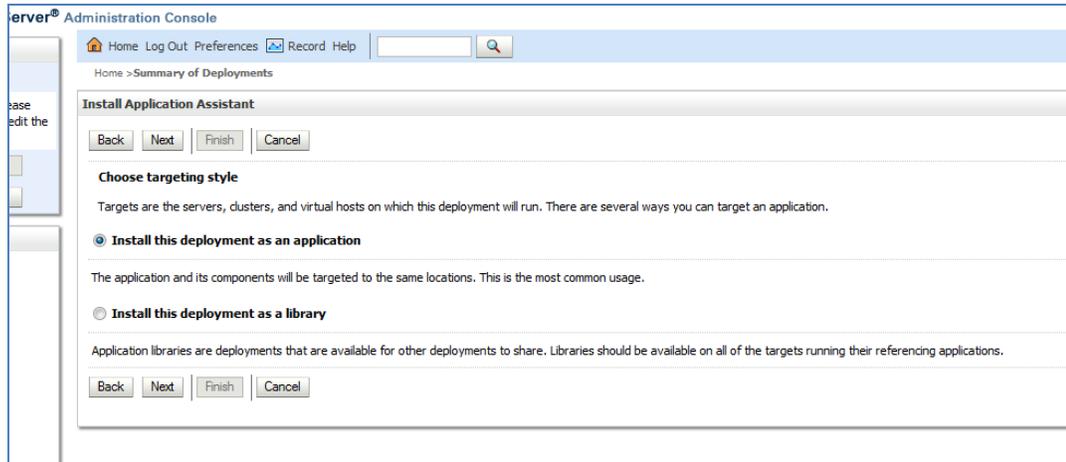
4. Login to web logic server, go to **Deployments** in your domain structure, click the **Lock & Edit** button, and select **Install**.



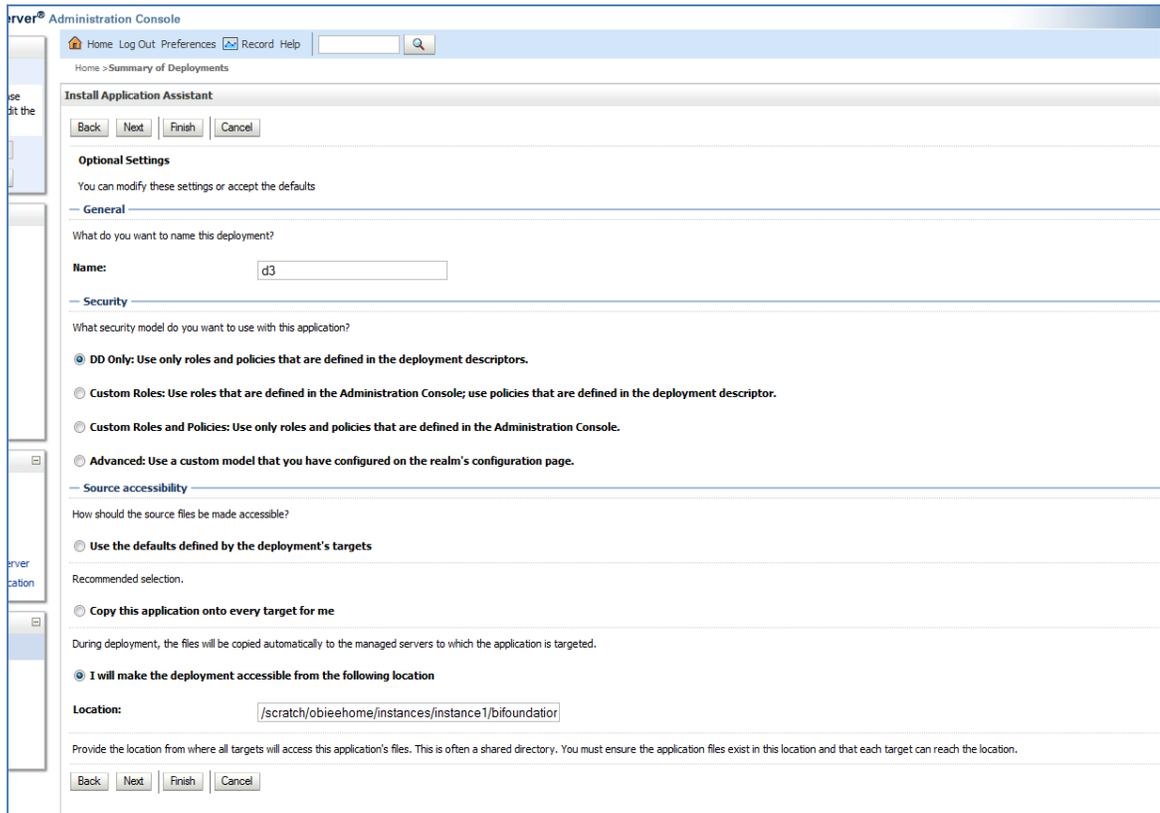
- Once you click on **Install** button, it will take you to the screenshot below where you will paste the full path to the d3 directory , check the checkbox next to **d3** (open directory) and click **Next**.



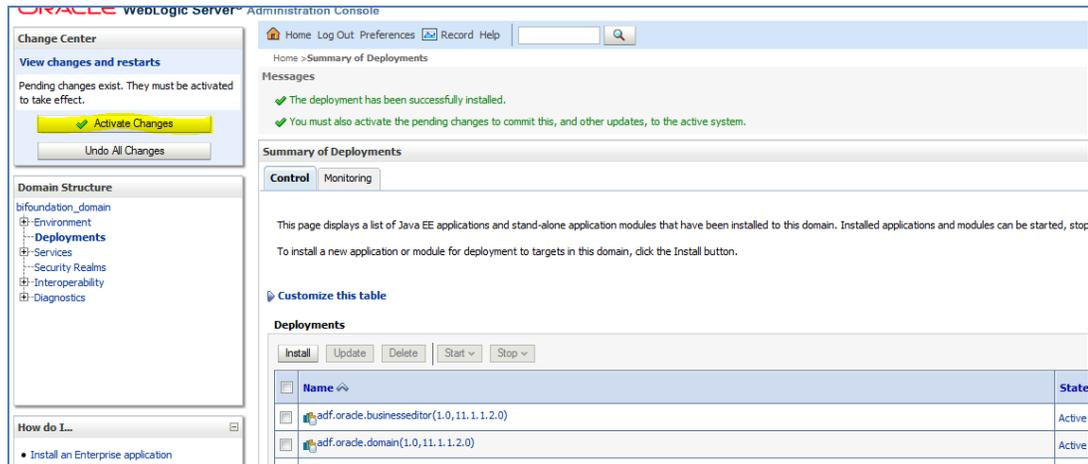
- On the next screen, you'll choose Install this deployment as an application and click **Next**.



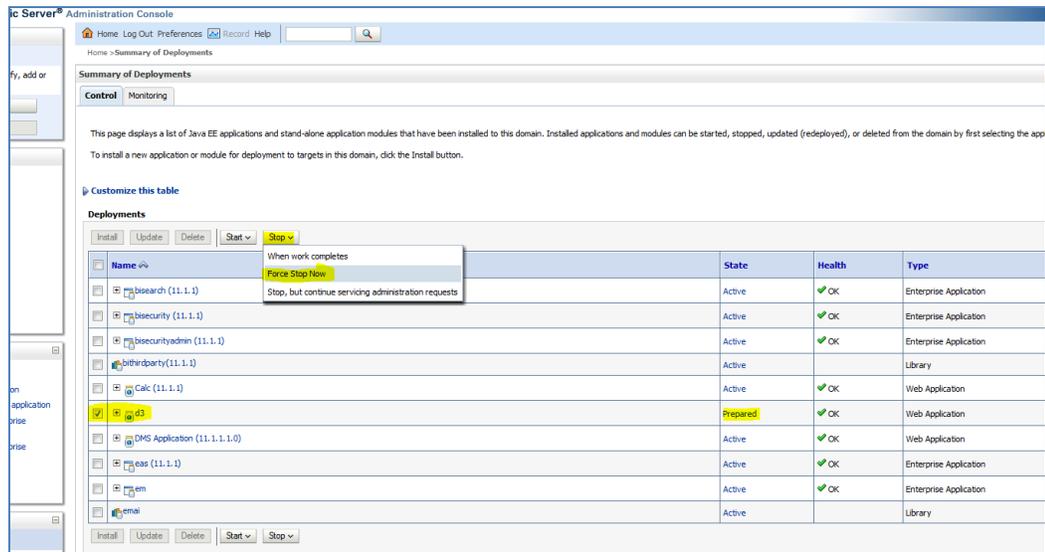
7. On the next screen, select “I will make the deployment accessible from the following location” and click **Finish**.



8. On this screen, you will have to click on **Activate Changes**.



- After activating the changes, the application will now be in a **Prepared** state, as in the screenshot below. You will have to stop the application by checking the checkbox next to it and selecting **Force Stop Now** from **Stop** menu.



- You can start the application by checking the checkbox next to it and selecting **Servicing all requests** from the **Start** menu.

Administration Console

Home Log Out Preferences Record Help

Home > Summary of Deployments

Summary of Deployments

Control Monitoring

This page displays a list of Java EE applications and stand-alone application modules that have been installed to this domain. Installed applications and modules can be started, stopped, updated (redeployed), or deleted.

To install a new application or module for deployment to targets in this domain, click the Install button.

Customize this table

Deployments

Install Update Delete Start Stop

Name	State	Health
bisearch (11.1.1)	Active	OK
bisecurity (11.1.1)	Active	OK
bisecurityadmin (11.1.1)	Active	OK
bitirdparty(11.1.1)	Active	
Calc (11.1.1)	Active	OK
d3	Prepared	OK
DMS Application (11.1.1.0)	Active	OK

Context menu: Servicing all requests, Servicing only administration requests

11. The application will now change to an **Active** state and ready to use.

Summary of Deployments

Control Monitoring

This page displays a list of Java EE applications and stand-alone application modules that have been installed to this domain. Installed applications and modules can be started, stopped, updated (redeployed), or deleted from the domain by first selecting the application or module.

To install a new application or module for deployment to targets in this domain, click the Install button.

Customize this table

Deployments

Install Update Delete Start Stop

Name	State	Health	Type
bisearch (11.1.1)	Active	OK	Enterprise Application
bisecurity (11.1.1)	Active	OK	Enterprise Application
bisecurityadmin (11.1.1)	Active	OK	Enterprise Application
bitirdparty(11.1.1)	Active		Library
Calc (11.1.1)	Active	OK	Web Application
d3	Active	OK	Web Application
DMS Application (11.1.1.0)	Active	OK	Web Application

Appendix E – Mapview Configurations

This section provides information on prerequisites, creating the mapviewer NAVTEQ data source, configuration edits and server starting.

NOTE: This is just a sample configuration working on sample data provided by NAVTEQ.

This section covers the following topics:

- [Prerequisites](#)
- [Creating the Mapviewer NAVTEQ Data source](#)
- [Creating the NAVTEQ Schema](#)
- [Configuration Edits and Server Starting](#)
- [Loading FSI_LOCATION_MAP_COORD for viewing NAVTEQ Maps](#)

Prerequisites

NAVTEQ database dump can be imported only into an Oracle 11g database. If you have no other option than using a 10g version, contact OBIEE/Mapviewer Product Management.

Creating the Mapviewer NAVTEQ Data source

Ensure that you have a connection to 11g Oracle database from the machine where your OBIEE platform is installed.

Create a NAVTEQ schema within that database for holding the NAVTEQ spatial data.

To create NAVTEQ schema, perform the steps as explained in the following section.

Downloading the Mapviewer NAVTEQ Database Dump

To download the Mapviewer NAVTEQ Database Dump, follow these steps:

1. Access the `SampleApp_Navteq_dmp.zip` file from the SampleApp download location (127MB)

<http://www.oracle.com/technetwork/middleware/bi-foundation/obieesamplesarchive-2026956.html>

2. Download and unzip the `SampleApp_Navteq_dmp.zip` file that contains an Oracle Database export file named

`obiee_navteq.dmp`

Creating NAVTEQ User

To create a NAVTEQ user, follow these steps:

1. Start a SQL*Plus session to the Oracle Database as a user with system or DBA privileges.
2. Run the following script:

```
create user obiee_navteq identified by obiee_navteq default
tablespace users quota unlimited on users;

grant "connect" to obiee_navteq;

grant "resource" to obiee_navteq;
```

3. Once the script is executed, verify whether you can connect to the newly created user.

NOTE: The OBIEE_NAVTEQ user creation script defaults with the password obiee_navteq (same as user name) within the script. It is recommended that you keep this value unchanged to simplify configuration. Oracle OBIEE 11G SampleApp Deployment Instructions 32.

Creating the NAVTEQ Schema

To create NAVTEQ Schema, follow these steps:

Importing the database dmp file

1. Import the Oracle Database export file - obiee_navteq.dmp into the obiee_navteq schema using the following import command, from the command line (Command Prompt in Windows):

```
c:\> imp obiee_navteq/obiee_navteq@connectString
file=obiee_navteq.dmp FULL=Y
```

2. connectString is the connection string to your Oracle Database 11g where the user obiee_navteq was created in the step mentioned earlier. Wait for the import process to complete, once successfully completed, login on your DB as obiee_navteq/obiee_navteq and validate that you can view the schema tables and some data.

Inserting Extra Spatial Metadata

1. Start a SQL*Plus session to the Oracle Database and connect as user obiee_navteq.
For example: c:\>sqlplus obiee_navteq/obiee_navteq@connectString
2. Run the following script:

```
INSERT INTO user_sdo_maps SELECT * FROM my_maps;

INSERT INTO user_sdo_themes SELECT * FROM my_themes;
```

```
INSERT INTO user_sdo_styles SELECT * FROM my_styles;
INSERT INTO user_sdo_cached_maps SELECT * FROM my_tile_cache;
Commit;
```

Configuration Edits and Server Starting

Confirm that WLS server and WLS managed servers are up and running, and ensure that OMPNCTL is not running.

NOTE: Neither OBIS nor OBIPS are running.

MapViewConfig.xml Edits (Optional)

1. Open the Mapviewer console using the following URL:
http://10.228.235.83:9704/mapviewer (replace 10.228.235.83:9704 with the correct IP address and port number on your install).
2. Click **Admin**.
3. Login with the username/password that you provided while installing the product.
4. Click **Configuration**. This opens the mapViewConfig.xml on your setup.
5. Make the following updates to the xml file.

<security_config> (Optional)

In the <security_config> property of this file, make the following changes:

- a. Change the <proxy_enabled_hosts> property to the following: Substitute the hostname, IP address and port to the correct values on your setup.

```
<proxy_enabled_hosts>
http://dadvmc0508.us.oracle.com:9704/mapviewer
http://dadvmc0508.us.oracle.com:9704/,http://10.228.235.83:9704/
http://10.228.235.83:9704/mapviewer
</proxy_enabled_hosts>
```

- b. Substitute any entries with these tags with the following property entries:

```
<disable_direct_info_request> true
</disable_direct_info_request>
<disable_info_request> true </disable_info_request>
<disable_csf>true</disable_csf>
<enforce_security_role> true </enforce_security_role>
```

Predefined Data Sources

1. At the end of the file, in the section named Predefined Data Source, add the following data source entry.
2. Replace the IP address, SID, and port to the correct values of the database where the obiee_navteq schema has been created in the above steps.

```
<map_data_source name="OBIEE_NAVTEQ_SAMPLE"  
  jdbc_host="10.229.147.238" (use your db ip)  
  jdbc_sid="orcl" (use your db sid)  
  jdbc_port="1521" (use your db port)  
  jdbc_user="obiee_navteq"  
  jdbc_password="!obiee_navteq" (use your selected password if  
  different from OOB)  
  jdbc_mode="thin"  
  number_of_mappers="3"  
  allow_jdbc_theme_based_foi="false" />
```

NOTE: Ensure that all tags have been closed correctly and also the above data source is not within the comments section (ensure that it is outside the comments section which is represented by <!-- .. -->).

Save and Restart, Verify

Click **Save** and **Restart** button at the bottom of the file.

1. Verify whether you can view OBIEE_NAVTEQ_SAMPLE as an entry in data sources.
2. Then after you are successful, there will entry in DataSources section.
3. Login to **Analytic screen > Administration**.
4. Click **Manage map Data**.
5. Click **Import Layer** and then choose OBIEE_COUNTRY.
6. Choose **Preview MAP** as OBIEE_WORLD_MAP_FAST.
7. Same for OBIEE STATE.
8. Select **Background Maps**.
9. Use import Background maps and chosen OBIEE_WORLD_MAP_FAST.

10. Edit the same, add layer `OBIEE_COUNTRY` and then `OBIEE_STATE`. While choosing, chose the location `OBIEE_WORLD_MAP` for higher Zoom value.
11. Select the zoom level for country 0 and for country 2...15.
12. Navigate back to Layers tab.
13. Edit `OBIEE_COUNTRY` and `OBIEE_STATE`.
14. By adding BI Key Columns

For Country:

- a. Choose Institutional Performance>Geography>Country Description.
- b. Choose Institutional Performance>Branch>Branch Country Description.
- c. Choose Retail Performance>Geography>Country Description.

For State:

- a. Choose Institutional Performance>Geography>State Description.
- b. Choose Institutional Performance>Branch>Branch State Description.
- c. Choose Retail Performance>Geography>State Description.

15. Once `configuration.xml` file is restarted, click **Data Sources**.

Loading `FSI_LOCATION_MAP_COORD` for viewing NAVTEQ Maps

For NAVTEQ Maps to work, it requires the location data in our atomic schema to be in sync with the map metadata in NAVTEQ schema. This is achieved through a new table `FSI_LOCATION_MAP_COORD`, the load process of which is described as follows.

Populate `FSI_LOCATION_MAP_COORD` based on `DIM_LOCATION` data itself, but description and codes should come from tables `OBIEE_COUNTRY`, `OBIEE_STATE`, `OBIEE_CITY` (from the DB schema configured for Maps, '`OBIEE_NAVTEQ`', for example in this case) respectively for Country, State and City, and `n_location_key` should be the corresponding `n_location_key` from `DIM_LOCATION`.

For Instance, let us consider the following data from `DIM_LOCATION`.

<code>N_LOCATION_SKEY</code>	1
<code>V_LOCATION_CODE</code>	HAW
<code>V_COUNTRY_CODE</code>	USA
<code>V_COUNTRY_DESC</code>	United States
<code>V_STATE_CODE</code>	HI
<code>V_STATE_DESC</code>	Hawaii

V_CITY_CODE	CIT11
V_CITY_DESC	Honolulu
V_ZIP_CODE	96813

Now, to populate the following columns in FSI_LOCATION_MAP_COORD:

n_location_skey =	1
v_country_code = OBIEE_COUNTRY.ISO_COUNTRY_CODE	USA
v_country_code_map = OBIEE_COUNTRY.ISO_COUNTRY_CODE	USA
v_country_desc = OBIEE_COUNTRY.NAME	United States
v_state_code = OBIEE_STATE.ISO_CTRY_CD_STATE_ABBRV	USA_HI
v_state_code_map = OBIEE_STATE.ISO_CTRY_CD_STATE_ABBRV	USA_HI
v_state_desc = OBIEE_STATE.STATE_NAME	HAWAII
v_city_code = OBIEE_CITY.CTRY_CD3_STATE_ABBRV_CITY	USA_HI_Honolulu
v_city_code_map = OBIEE_CITY.CTRY_CD3_STATE_ABBRV_CITY	USA_HI_Honolulu
v_city_desc = OBIEE_CITY.CITY_NAME	HONOLULU
v_zip_code =	96813

HTML5 Compliance of OBIEE Reports in IE11

Perform the following steps in order to verify the HTML5 compliance of OBIEE reports in IE11:

1. Remove the compatibility settings for analytics.
2. Change the `instanceconfig.xml` file to make all the chart views to be shown in HTML5 by default.

You can find the `instanceconfig.xml` file in the following location:

```
OBIEE_HOME/instances/instance1/config/OracleBIPresentationServicesComponent/coreapplication_obips1
```

```
<Charts>
  <DefaultWebImageType>html5</DefaultWebImageType>
</Charts>
```

3. Enable Mapviewer and D3 reports (to ensure that these reports show up as is).
4. Verify all the BI reports by removing the default chart view setting (to ensure that these reports show up as usual irrespective of HTML5 or flash web Image formats).

Details on OBIEE11.1.9.5

In a browser that does not support the html5 format, the image renders in the flash format instead (which is also interactive).

Appendix F: Frequently Asked Questions

What checks does the 8.0.3.0.0 Release patch perform?

- Environment Check- As part of environment check, it performs Java validation, Environment Variables validation, OS specific validation, DB specific validation, and it shuts down all OFSAAI Services (Infrastructure Server, ICC Server, and back-end services).
- Post Install check- As part of Post install check, it checks if OFSAAI services can be successfully started.

Which version of ERwin Data Modeler does OFSAAI support?

OFSAAI now supports ERwin version 9.2 and 9.5 generated xmls in addition to ERwin 4.1, ERwin 7.1, ERwin 7.3 and ERwin 9.0 formats.

What should I do for viewing the log files in Debug level for troubleshooting?

By default, the log level is set as INFO. You need to manually change it to Debug to view the log files in debug level. Based on your requirement, you can change the log level to Warn, Error, or Fatal as well.

1. Navigate to `$FIC_HOME/conf` in the APP layer of your OFSAAI installation.
 - Change the priority value to Debug in the `RevLog4jConfig.xml` file.

For example:

```
<root>
  <priority value ="debug" />
  <appender-ref ref="ConsoleAppender1"/>
</root>
```

- Change the value of `LOGGERLEVEL` in the `DynamicServices.xml` file from **20** to **0**. (**20** is the value for Info and **0** for Debug.)

NOTE: For multi-tier installation, you need to change the log level to Debug in the `DynamicServices.xml` and `RevLog4jConfig.xml` files, which are present in `$FIC_APP_HOME/conf`, `$FIC_DB_HOME/conf`, and `$FIC_WEB_HOME/conf` as well.

2. Navigate to `$FIC_WEB_HOME/webroot/conf` and change the **priority value** to **Debug** in the `ExportLog4jConfig.xml`, `MDBLogger.xml`, and `PR2Logger.xml` files for viewing log files in Debug level for the modules Archive/Restore, Metadata Browser and RRF respectively.
3. Generate the application EAR/WAR file and redeploy the application onto your configured web application server. For more information on generating and deploying

EAR / WAR file, see the Post Installation Configuration section in [Oracle Financial Services Profitability Management Application Pack Installation Guide Release 8.0.0.0.0](#).

4. Restart the OFSAAI Services (APP and WEB). For more information, see the **Start/ Stop Infrastructure Services** section in [Oracle Financial Services Profitability Management Application Pack Installation Guide Release 8.0.0.0.0](#).

What should I do if “What if” screen is not displayed completely after clicking Create Scenario button?

1. `<InIFrameRenderingMode>allow</InIFrameRenderingMode>`

entry needs to be added in `<Security></Security>` tags in following file:

```
<MIDDLEWARE_HOME>/instances/instance1/config/OracleBIPresentationServicesComponent/coreapplication_obips1/instanceconfig.xml
```

2. `<context-param>`

```
<param-name>oracle.adf.view.rich.security.FRAME_BUSTING</param-name>
```

```
<param-value>never</param-value>
```

```
</context-param>
```

entries need to be added between `<servlet-mapping ></servlet-mapping>` and `<login-config></login-config>` tags in following file:

```
<MIDDLEWARE_HOME>/oracleBI1/bifoundation/web/app/WEB-INF/web.xml
```

What should I do If Account Profile Report is displaying error?

To work some reports in OBIEE (11.1.1.9.5), set `EVALUATE_SUPPORT_LEVEL` to '2' inside `NQSConfig.INI` file.

Path of `NQSConfig.INI` file is mentioned below:

```
/scratch/obiee11g/obiee11g_new/instances/instance1/config/OracleBIServerComponent/coreapplication_obis1
```

Oracle Financial Services Profitability Management
8.0.3.0.0 Installation and Configuration Guide

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