OAS Installation Guide

Oracle Financial Services Lending and Leasing

Release 14.12.0.0.0

Part No. F53373-01

March 2022

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OAS Installation Guide
March 2022
Oracle Financial Services Software Limited

Oracle Park

Off Western Express Highway
Goregaon (East)
Mumbai, Maharashtra 400 063
India
Worldwide Inquiries:
Phone: +91 22 6718 3000
Fax:+91 22 6718 3001
https://www.oracle.com/industries/financial-services/index.html

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Oracle Financial Services Lending and Leasing User Documentation

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1. Preface

This document contains notes and installation steps needed to install and Configure Oracle Analytics Publisher. Oracle Financial Services Lending and Leasing relies on this software to configure reports and this document is in no way meant to replace Oracle documentation supplied with this Oracle product or available via Oracle technical support. The purpose of this document is only meant to supplement the Oracle documentation and to provide Oracle Financial Services Lending and Leasing specific installation instructions.

For recommendations on security configuration, refer Security Configuration Guide.

Oracle Analytics Publisher installation consists of the following steps.

- Installing OA Publisher
- Configuring OA Publisher
- Creating OA Publisher Datasource
- Importing Reports to OA Publisher Server
- Configure MDB Mail Server

1.1   Prerequisites

The following software are required to install Oracle Financial Services Lending and Leasing application and they are available from the following sources:

- Oracle Software Delivery Cloud (http://edelivery.oracle.com/)
- Oracle Technology Network (OTN)

1. JDK Version 1.8.0_301 or above (https://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html)

2. Oracle WebLogic Server 12c Version 12.2.1.4.0 (Fusion Middleware Infrastructure Installer) http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-main-097127.html

3. The patches for Fusion Middleware 12.2.1.4.0 with the following patch number are to be applied - 30657796. However, this is required only for OAS Linux and can be ignored for OAS Windows.

4. Oracle Analytic Server (OAS) 5.9.0
   http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html

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Note

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

1.2   Audience

This document is intended for system administrators or application developers who are installing Oracle Financial Services Lending and Leasing Application.
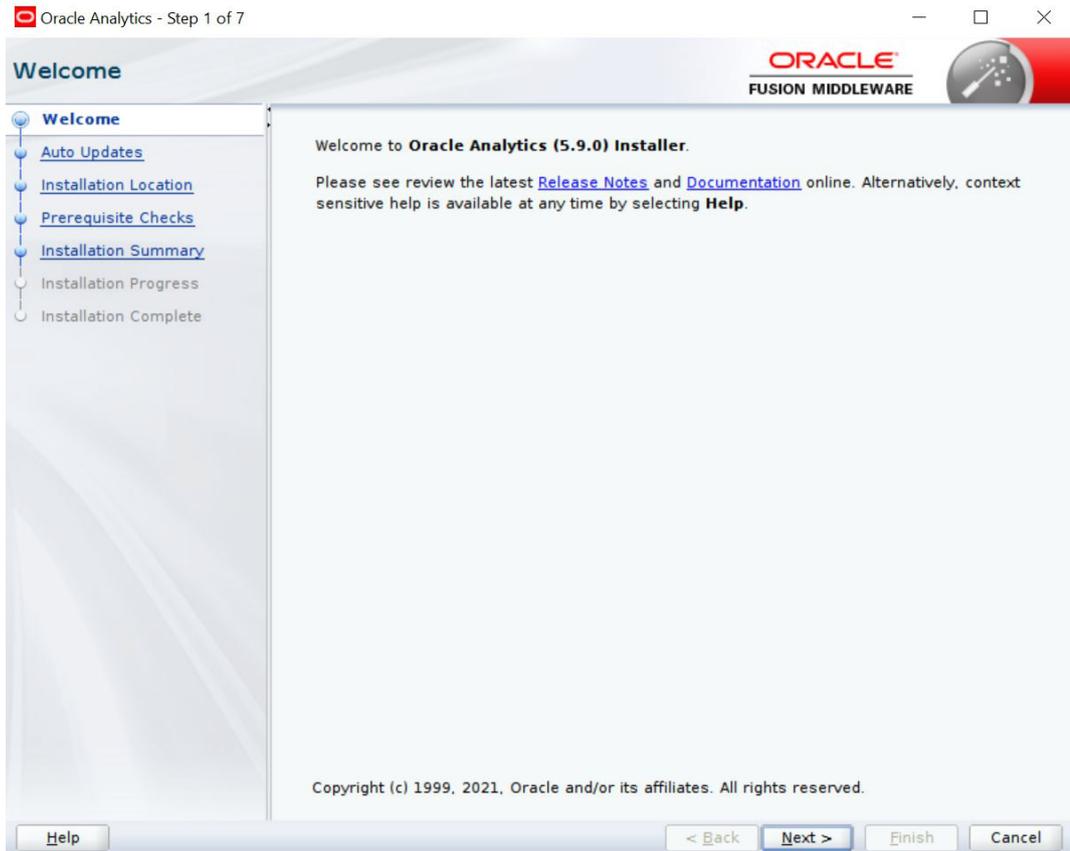
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Conventions Used

Term	Refers to
Home Directory/ $OFSLL_HOME	Oracle Financial Services Lending and Leasing Home Directory

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2. Installing OA Publisher

2.1 Installing OA Publisher

Follow the below steps to install Oracle Analytics publisher:

1. Download and unzip 'Oracle_Analytics_Server_Linux_5.9.0.zip'.

2. Navigate to .jar file location.

3. Run the command java -jar Oracle_Analytics_Server_Linux_5.9.0.jar

4. The following window is displayed.

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

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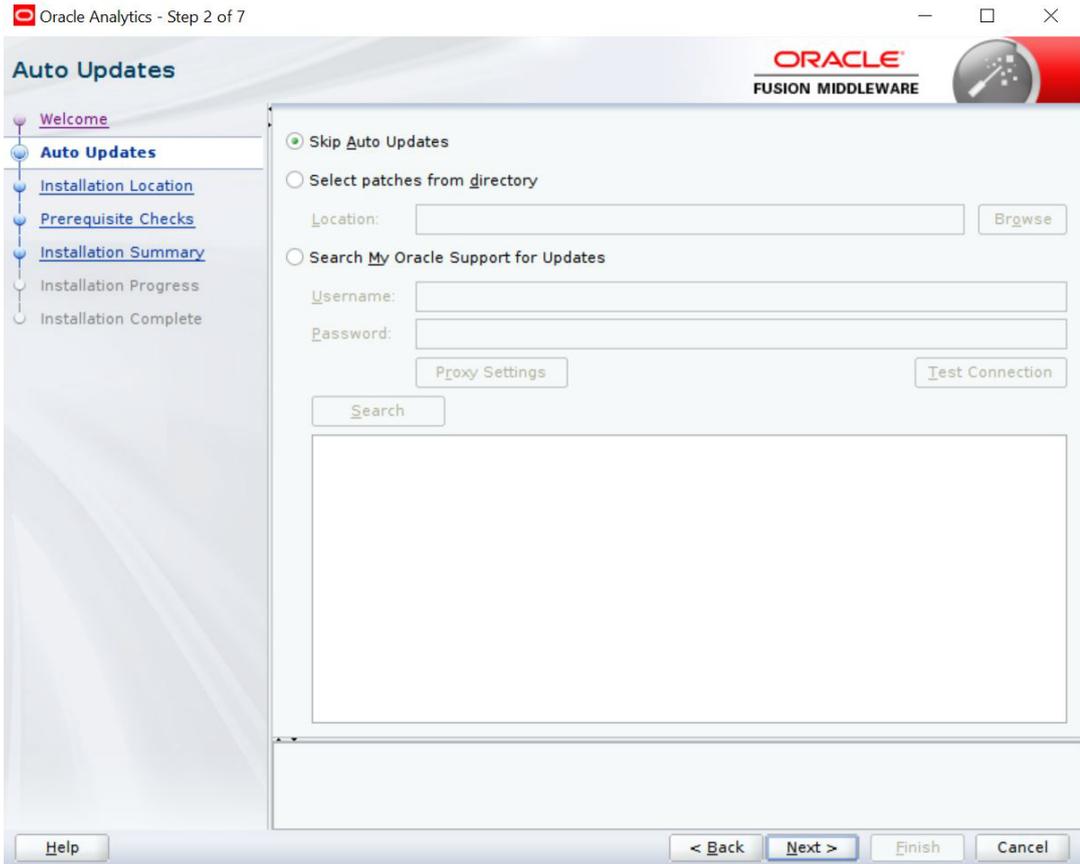
7. Click 'Next'. The following window is displayed.

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

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

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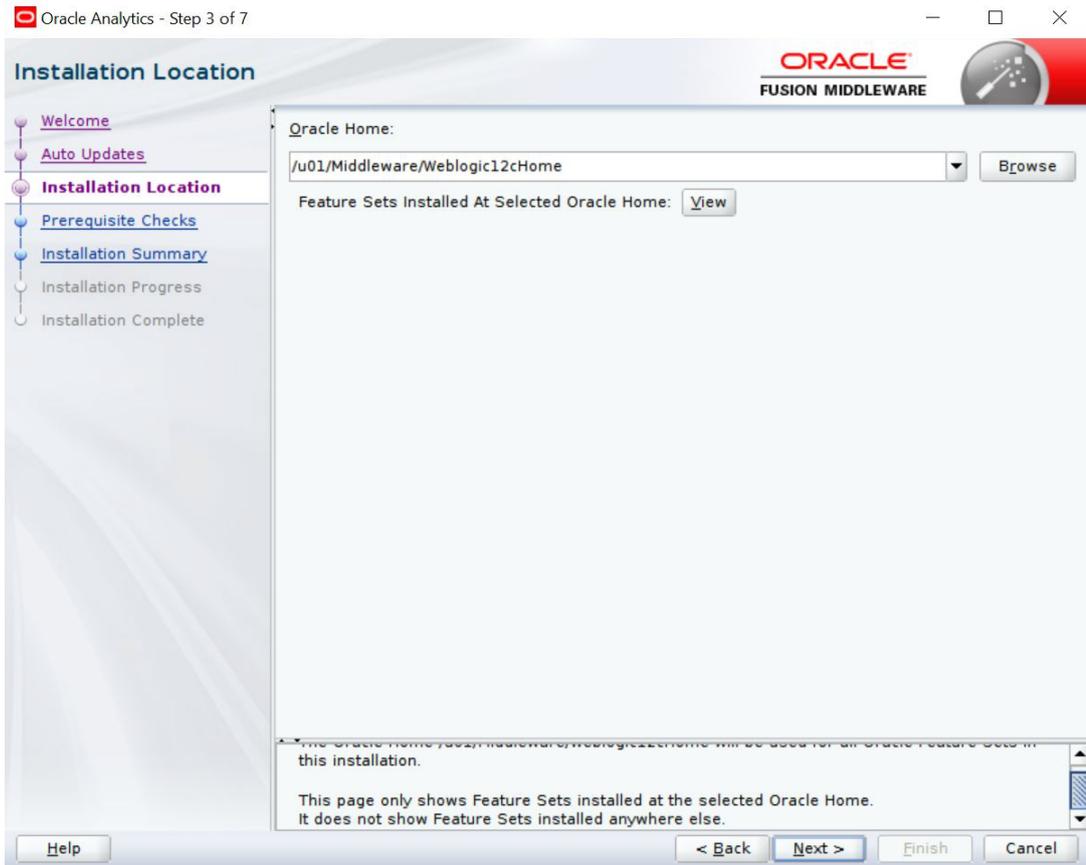
10. The following window is displayed. Click 'Install'.

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

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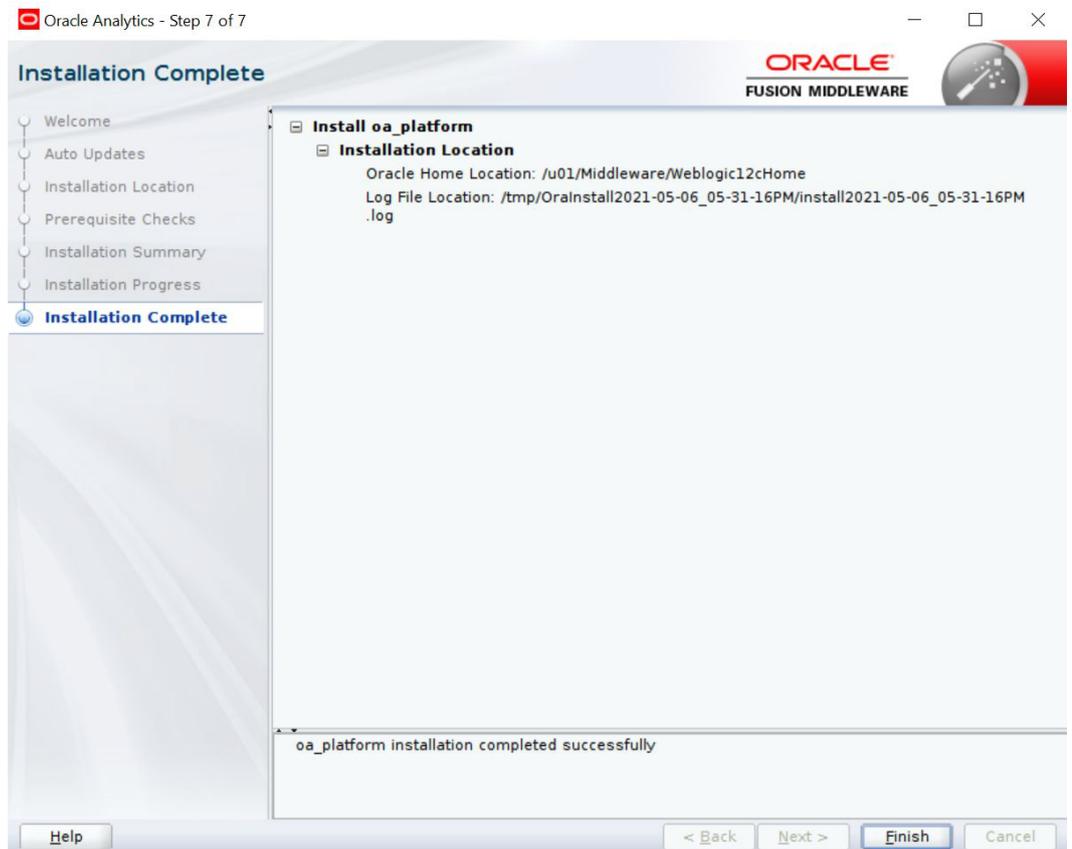
12. Once the installation is complete click 'Finish' to close.
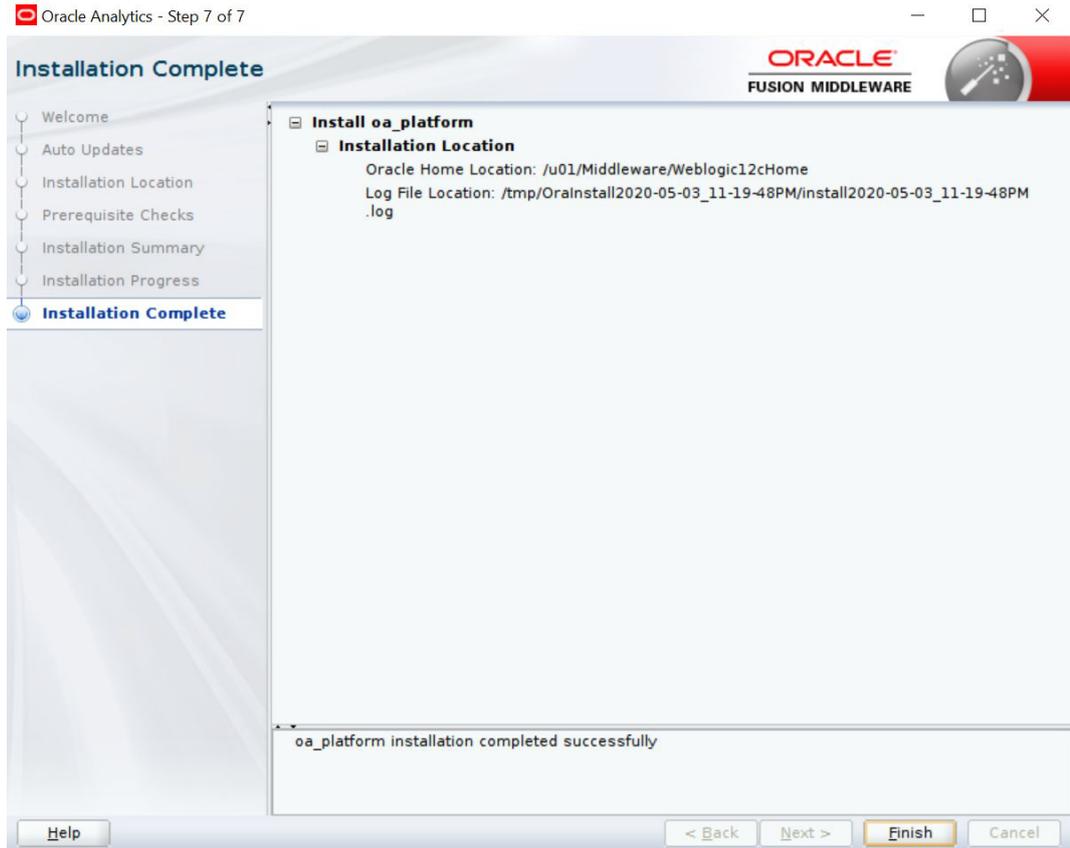
3. Configuring OA Publisher

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

To configure OA Publisher

1. Launch configuration window and browse to $BI_HOME/bin (for example, BI_HOME is / u01/Middleware/Weblogic12cHome/bi).

2. Run ./config.sh. The following window is displayed.

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

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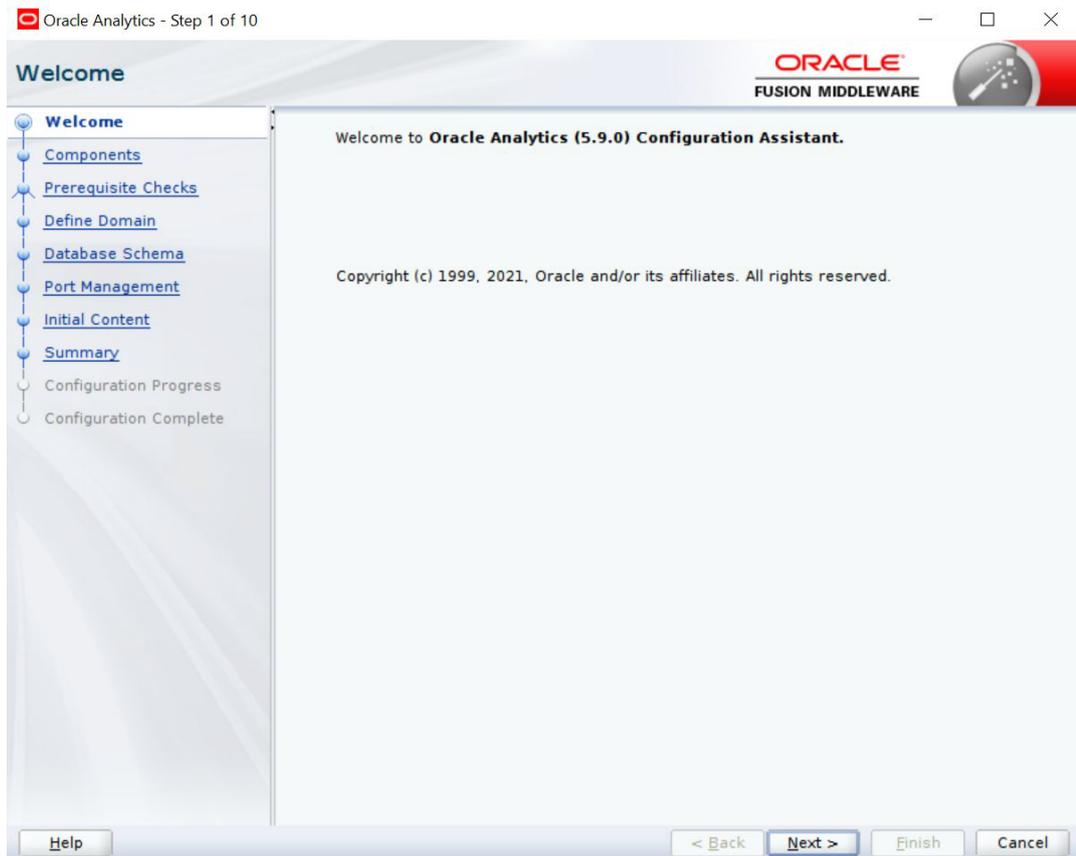
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5. Enter the User Name, Password and Domain Name for OA Publisher domain. Click 'Next'. The following window is displayed.

6. Select the option 'Create New Schema' and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.

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

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

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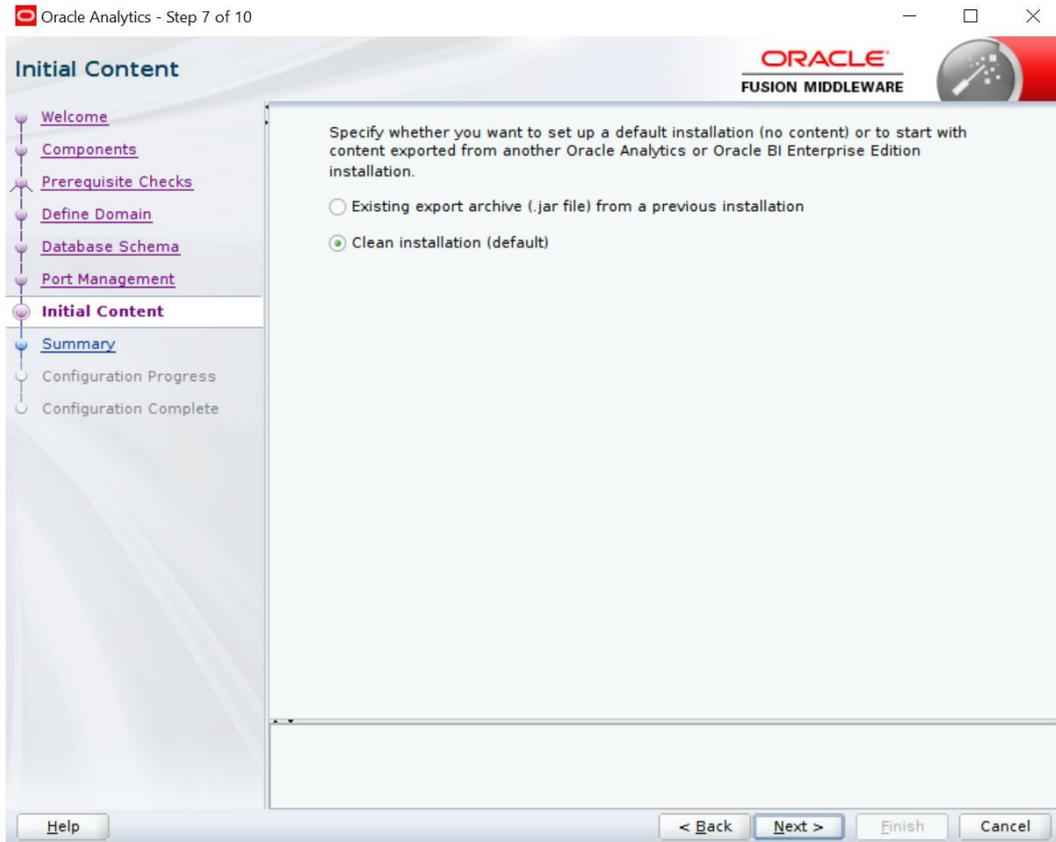
10. Click 'Configure'. The following window is displayed.

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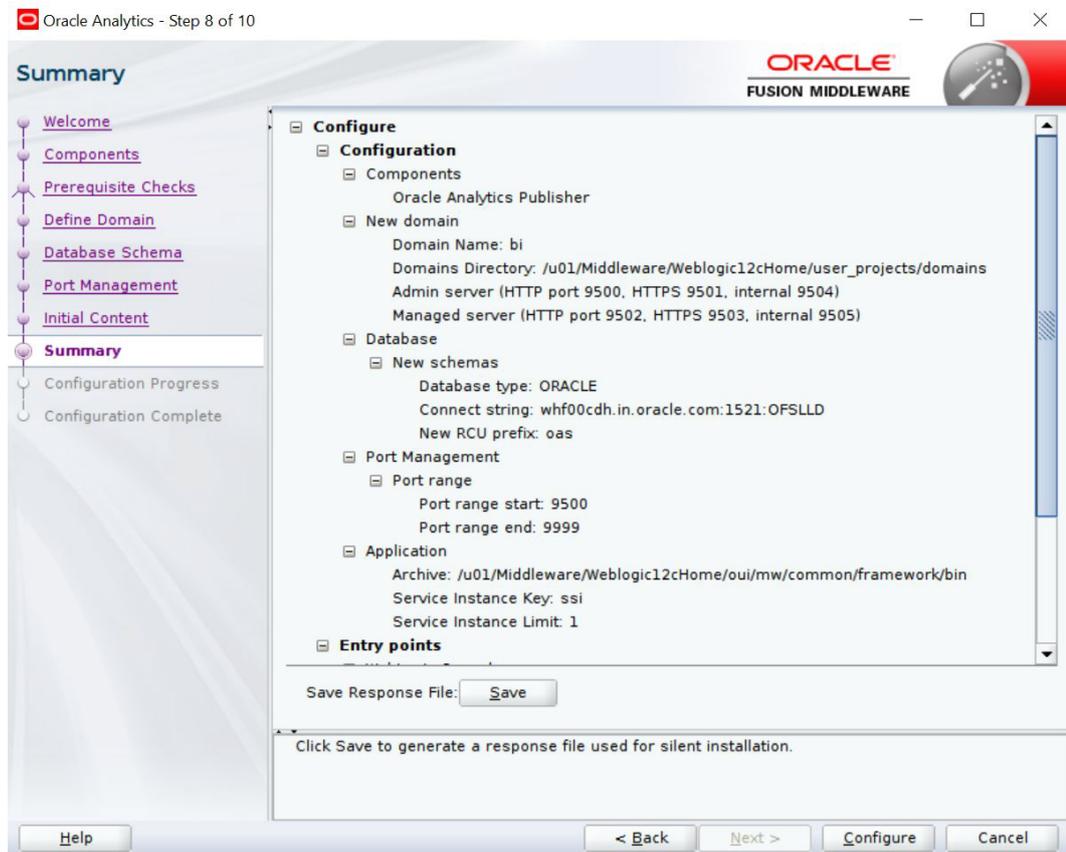
11. Click 'Next'. The following window is displayed
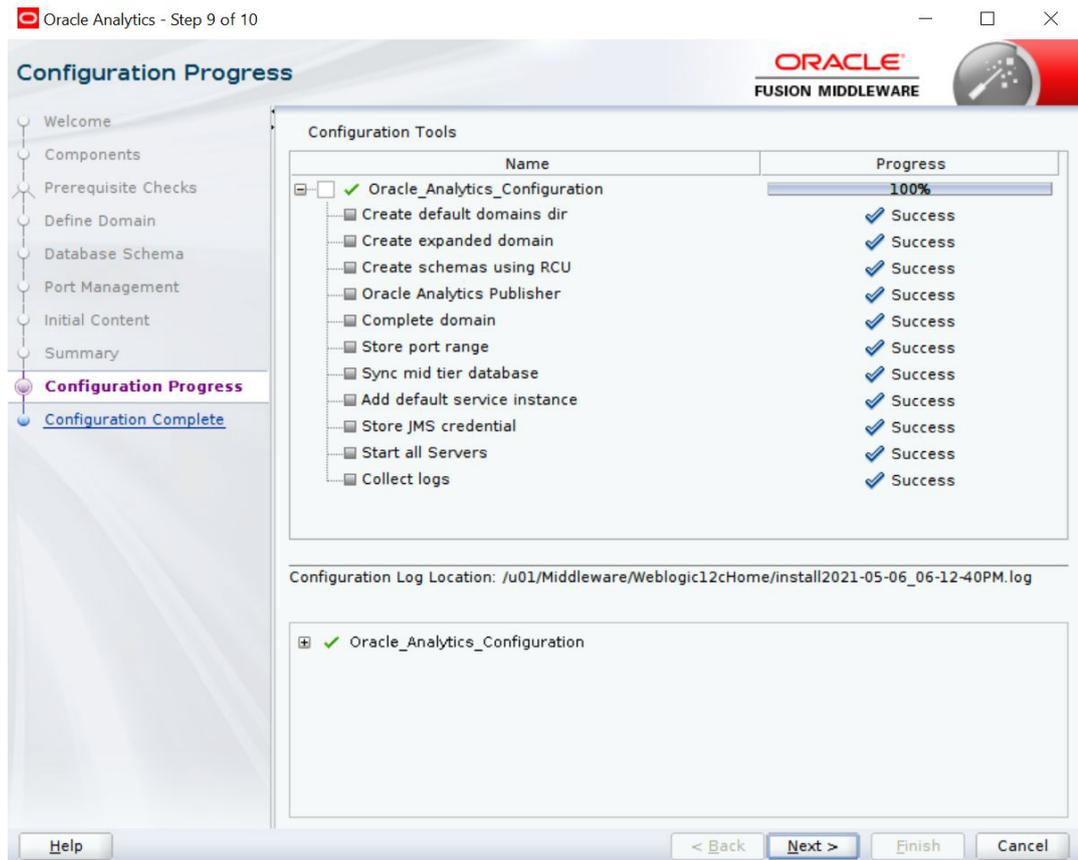
12. Click 'Save' and save the Response File.

13. Click 'Finish'. The application will create a new domain for OA Publisher with the details as highlighted in the above screen.

3.1 Verifying Successful OA Publisher Deployment

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

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4. Creating OA Publisher Datasource

To create OA Publisher Datasource, do the following:

1. Access the console URL using http://hostname:<port>/xmlpserver.
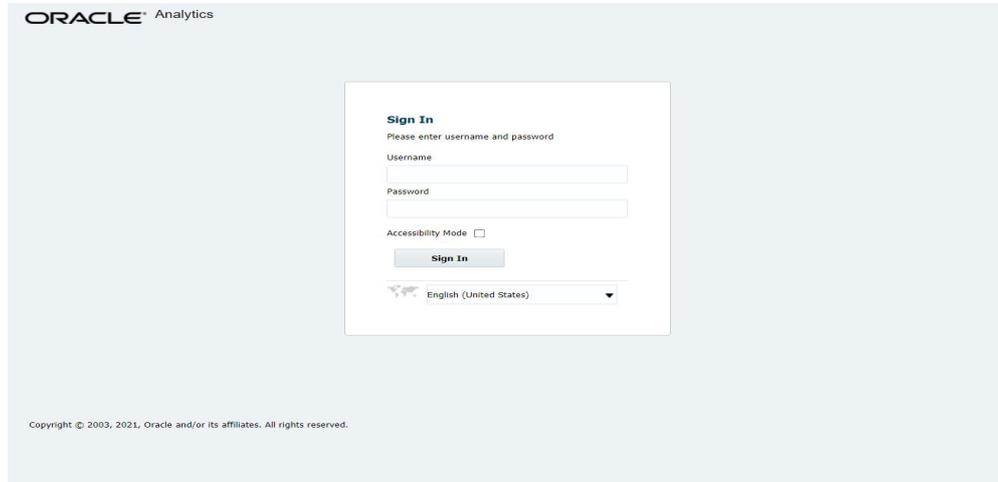
2. The following window is displayed. Click Administration option on the header.
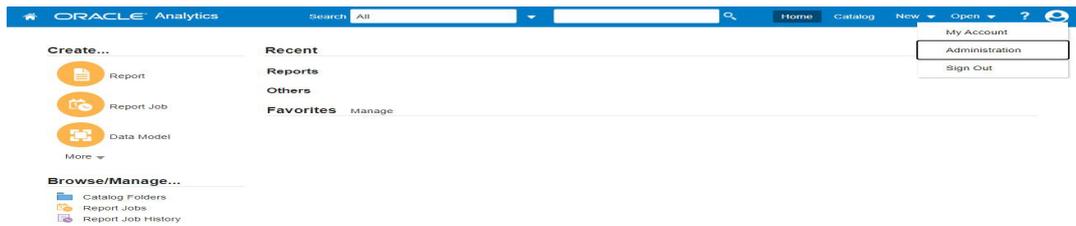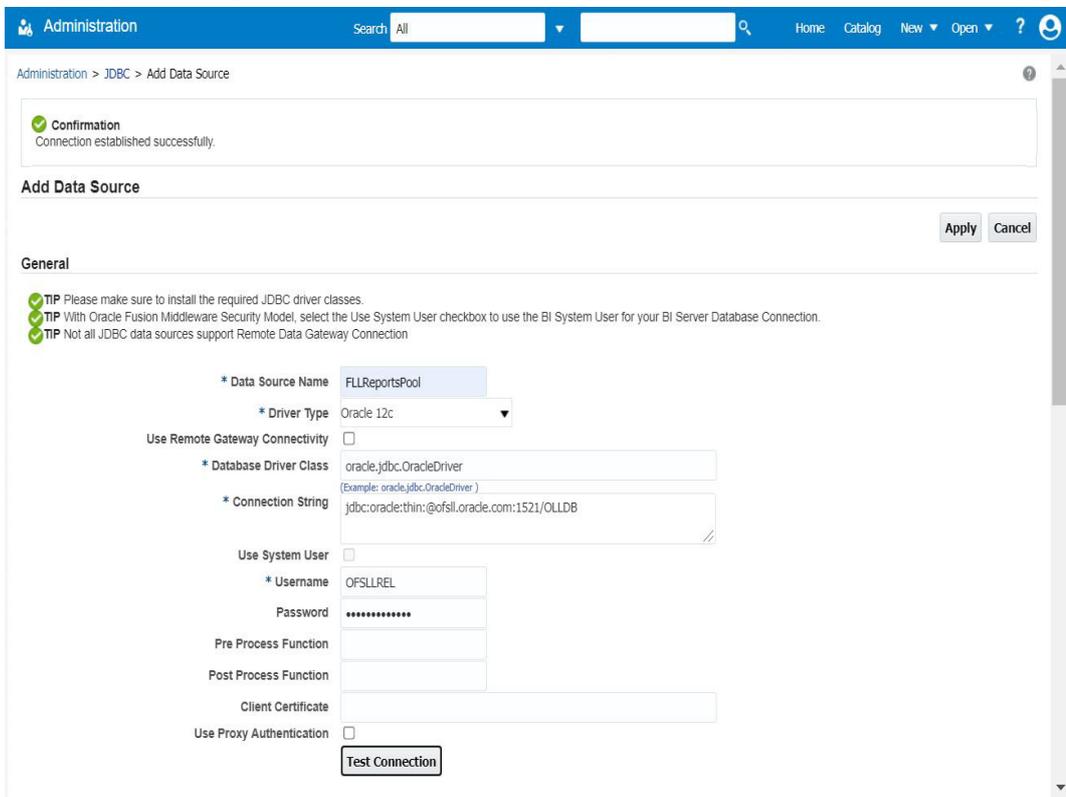

3. Click on 'JDBC Connection'.
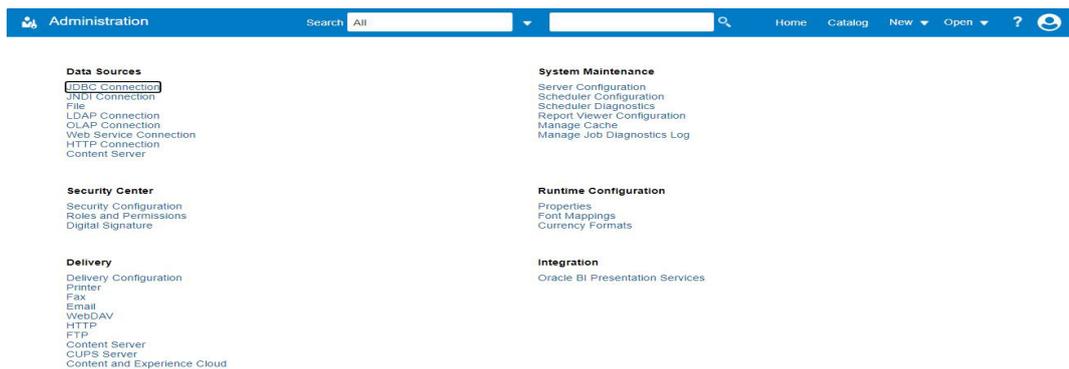
4. Click 'Add Data Source'.
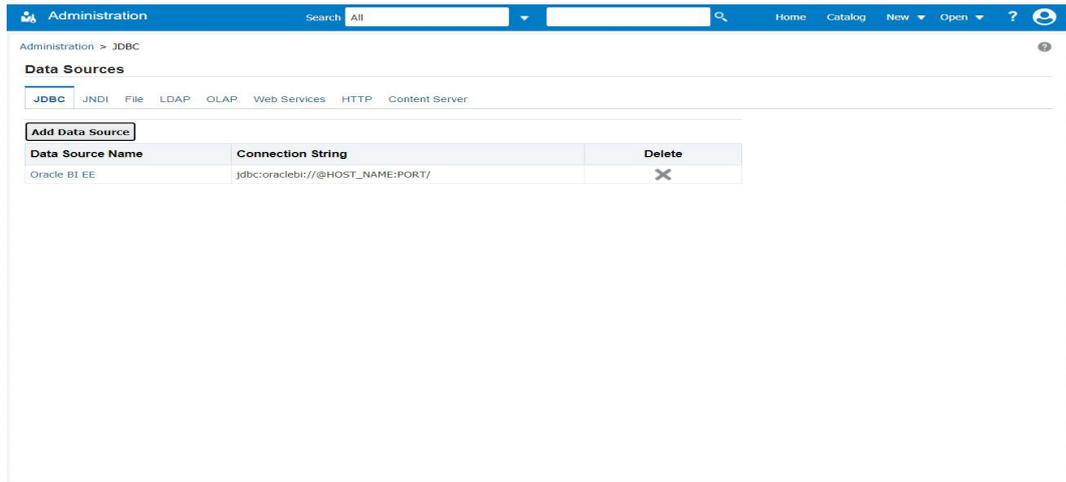
5. Add the following details:

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

Note

If "BI Author" and "BI Consumer" roles are not displayed in the 'Available Roles' section, you need to create the roles as explained in following 'Creating Roles' section.

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6. Click 'Apply'.

4.1 Creating Roles

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

To create WebLogic Application Role

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

2. Select Weblogic Domain > Security > Application Roles as indicated in the following screen.
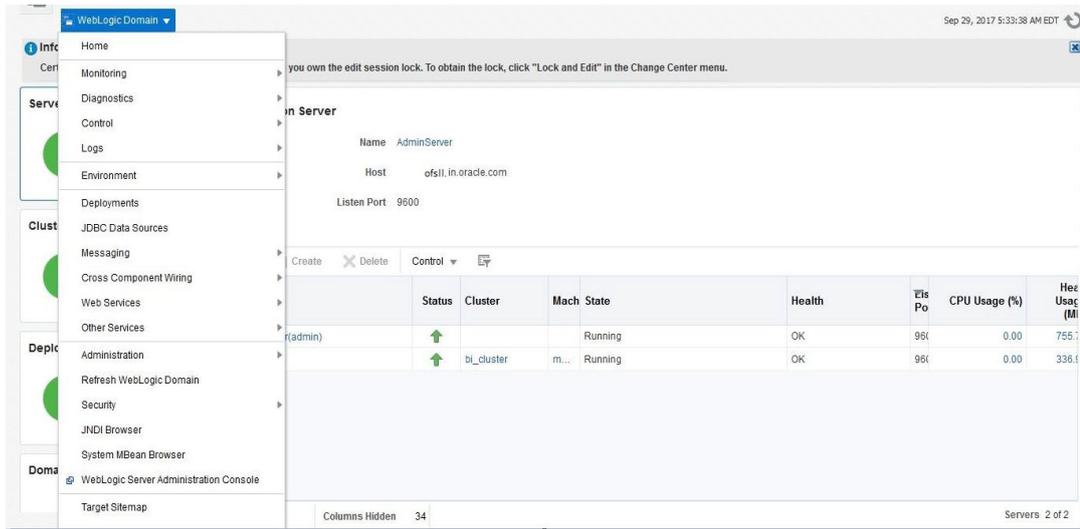
3. In the Application Stripe field, select 'obi' from the drop-down list. The option 'OAServiceAdministrator' is added by default. Click 'Create'.
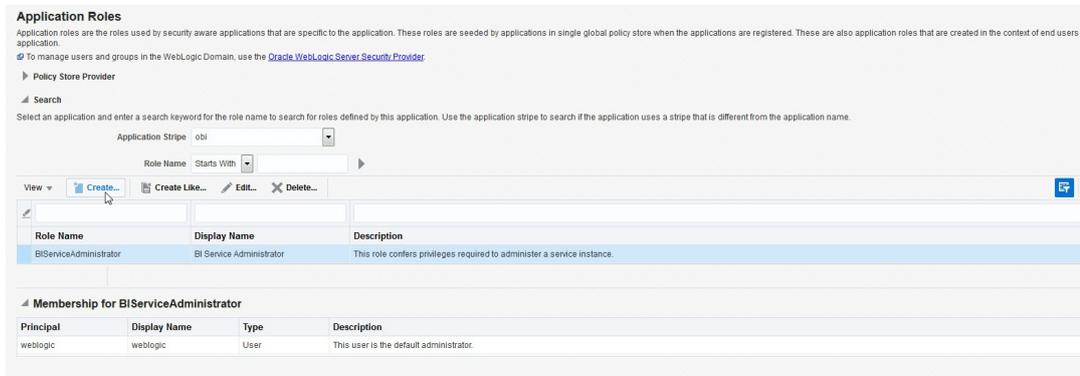
4. Specify the following details:

    –   Role Name

    –   Display Name

    –   Description

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5. Click 'Add' to add the application role to the members family. The same can later be mapped to required Users or Groups defined in Enterprise LDAP server, or the role can be mapped to other application roles.

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

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

To Create WebLogic Application Policies

1. Login to Enterprise Manager using the URL - http://hostname:port/em.
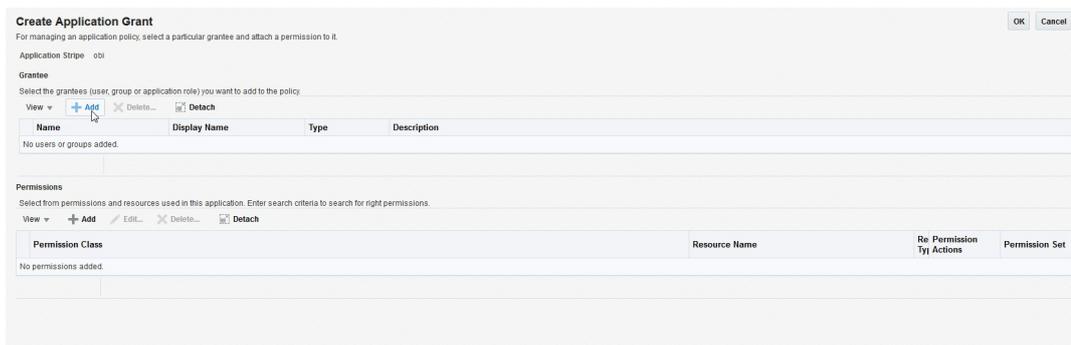
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2. Select Weblogic Domain > Security > Application Policies as indicated in the following screen:
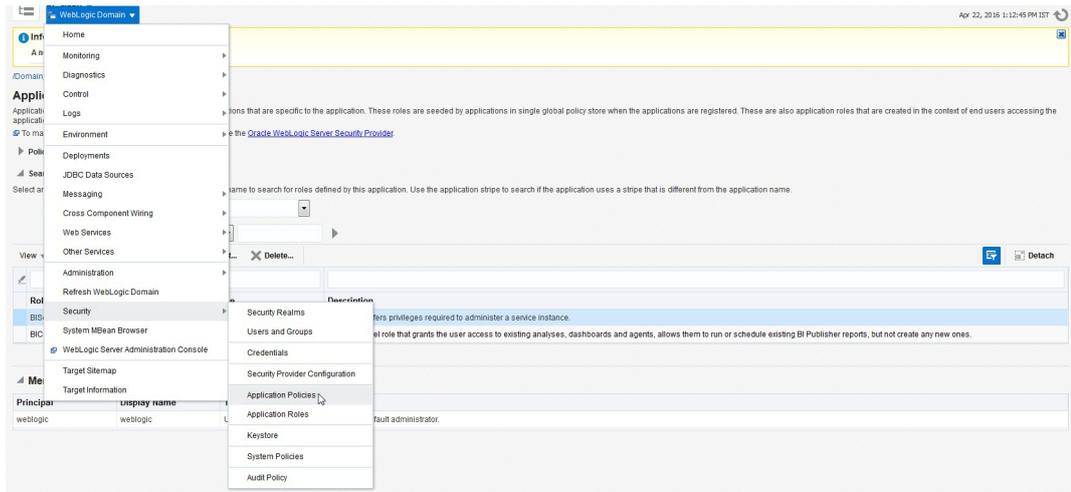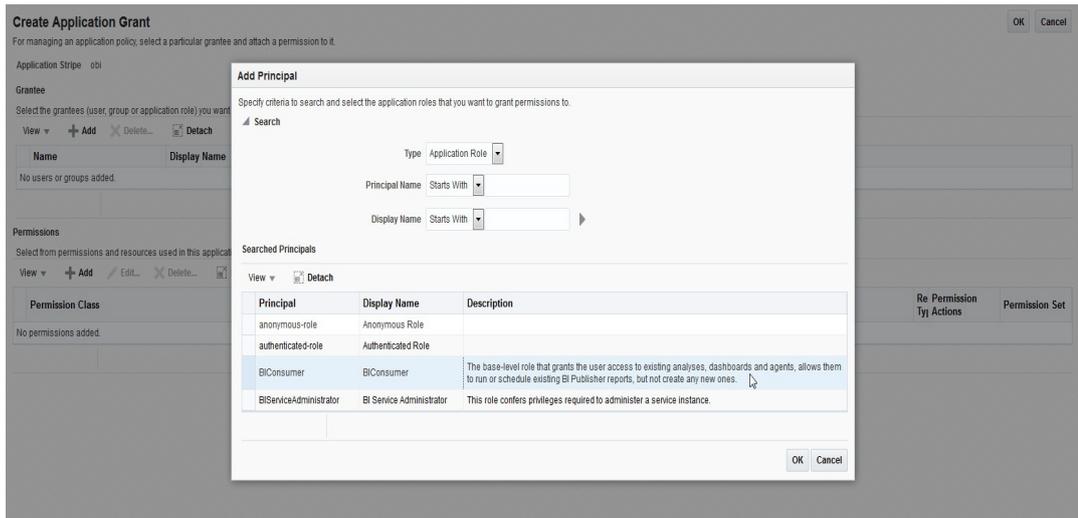

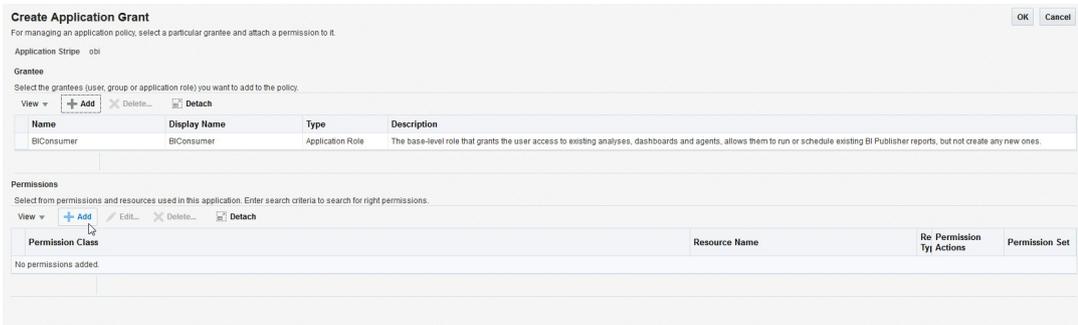3. In the Application Stripe field, select 'obi' from the drop-down list. Click 'Create'.
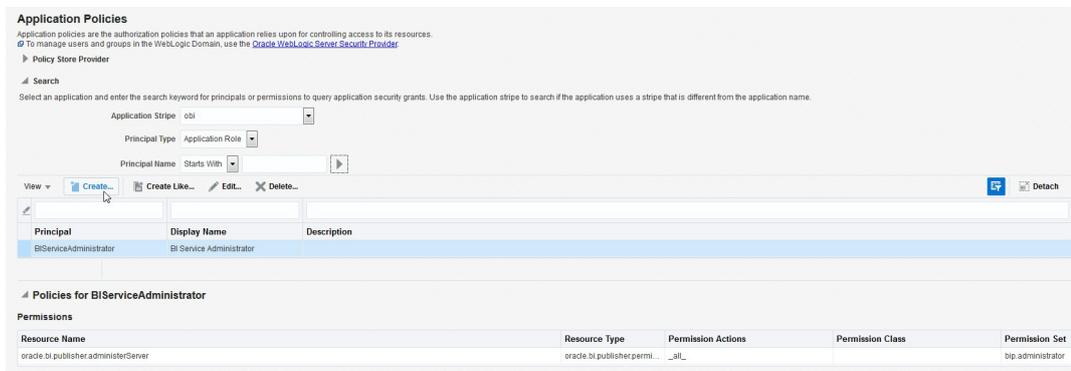
4. In 'Create Application Grant' screen, under the Grantee section, click 'Add'.

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


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

7. In the search criteria, select 'Resource Type' and select the resource type from the drop-down list. Select the required resource from the search results and click 'Continue'.
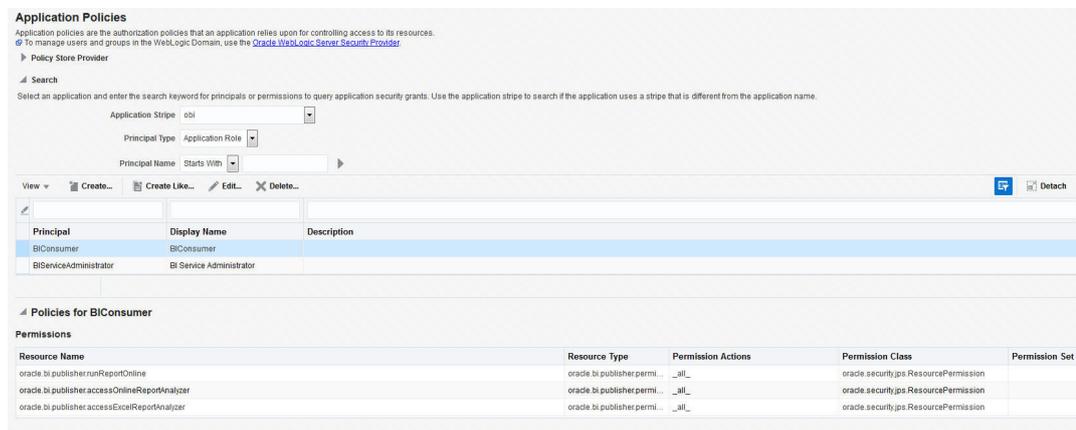
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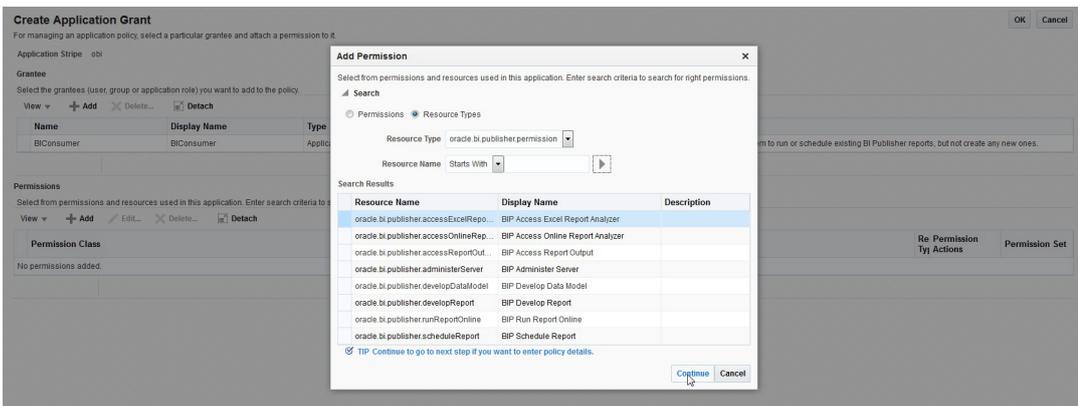
8. Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click 'Select'.
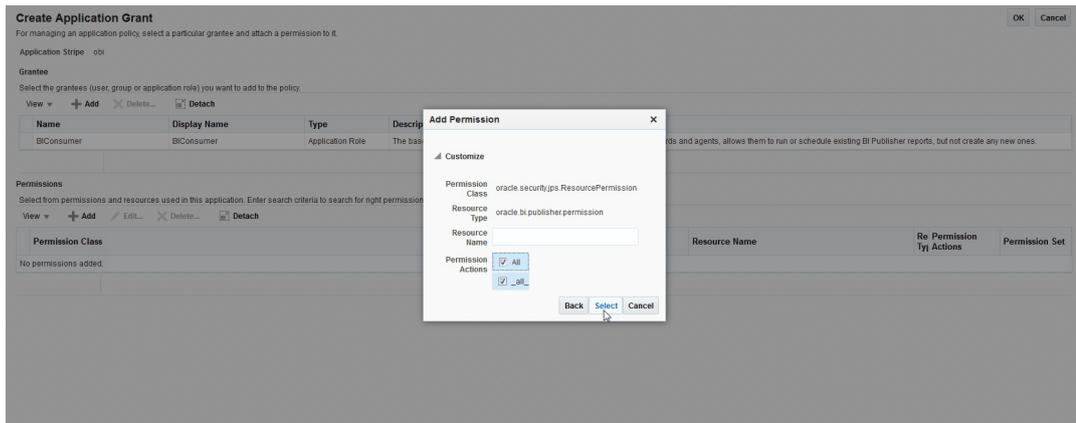
9. The selected permissions are defined to the application role. Similarly you can define the required permissions for other application roles.
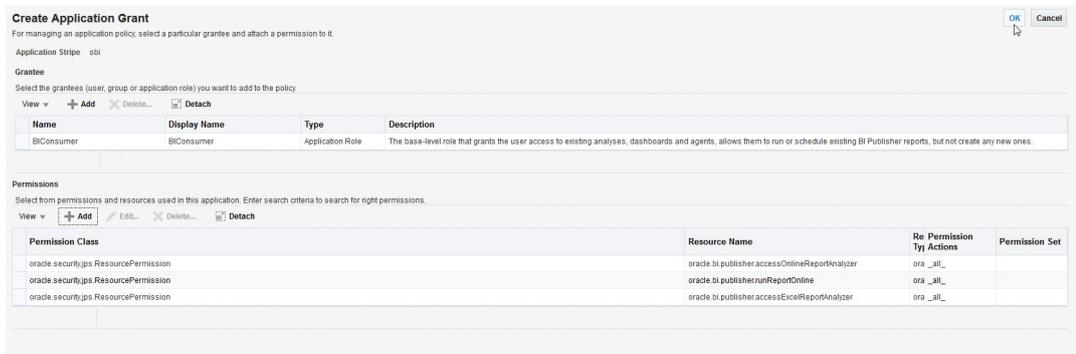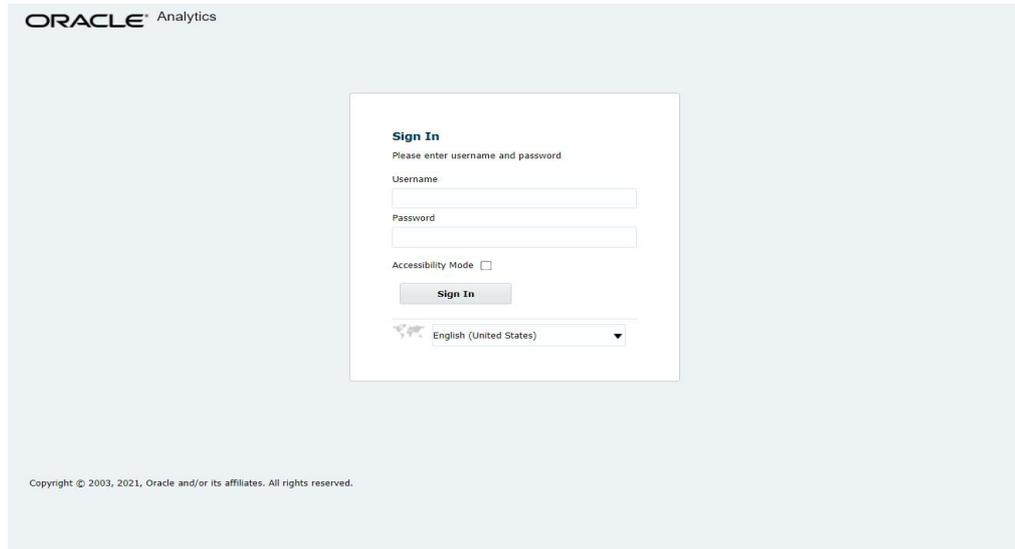

10. Once done, click 'OK'.

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5. Importing Reports to OA Publisher Server

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

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

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

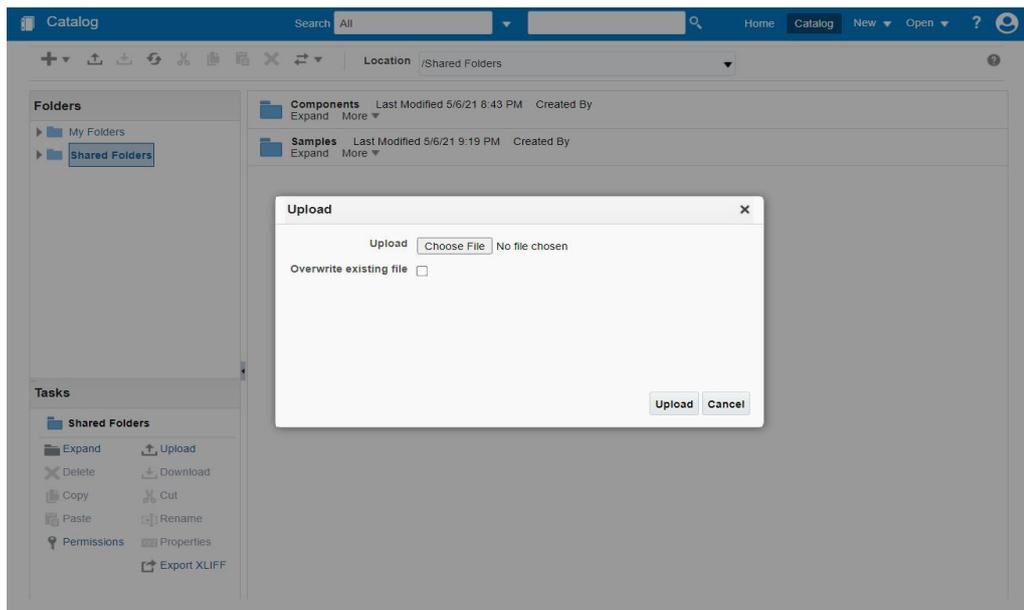3. Login with valid credentials.

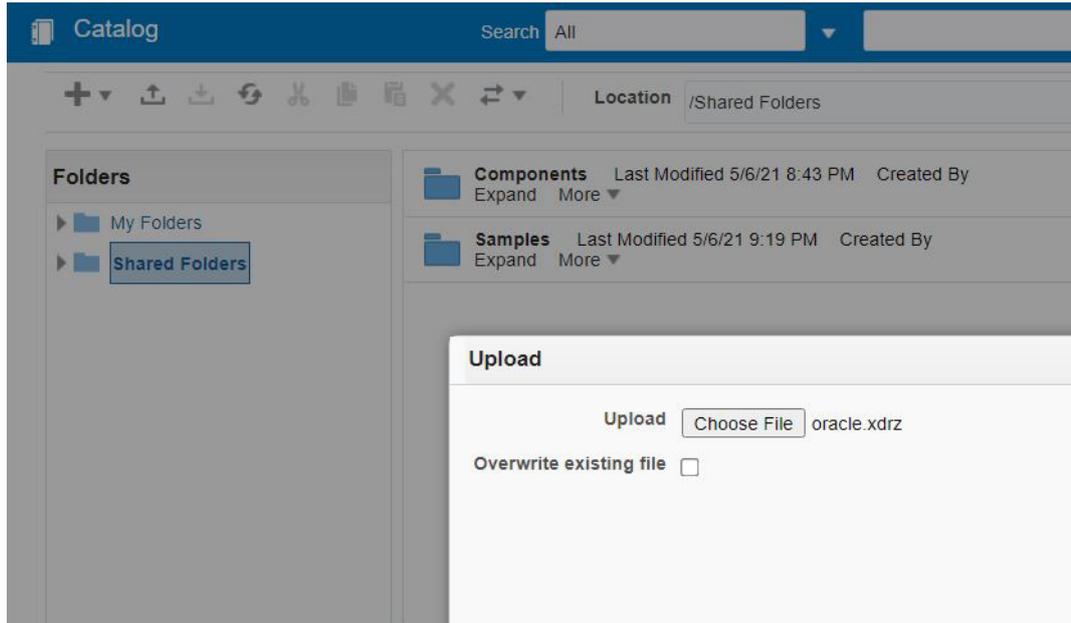4. Following window is displayed. Click on 'Catalog Folders' on the left pane.
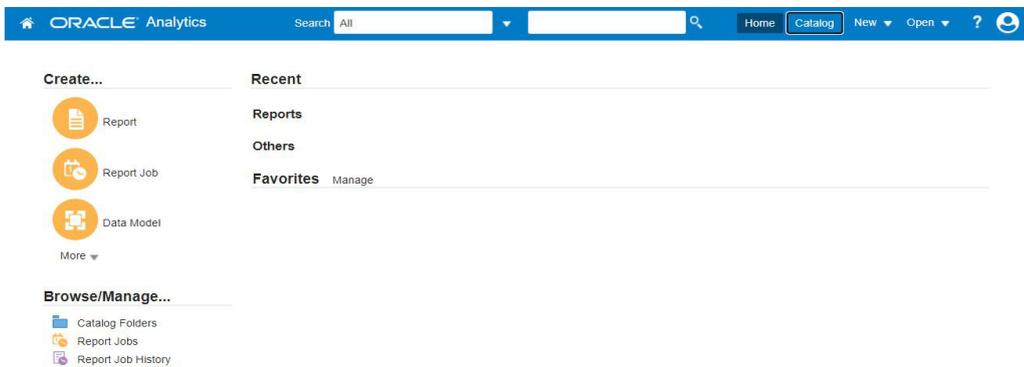
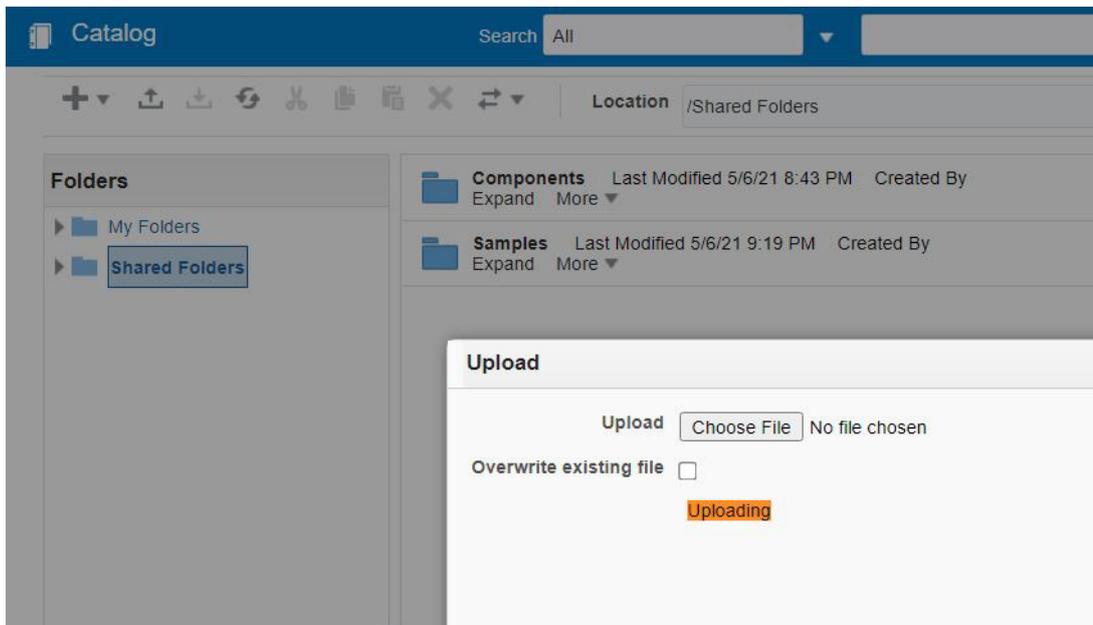5. Click on 'Shared Folders' option and then click 'Upload'.
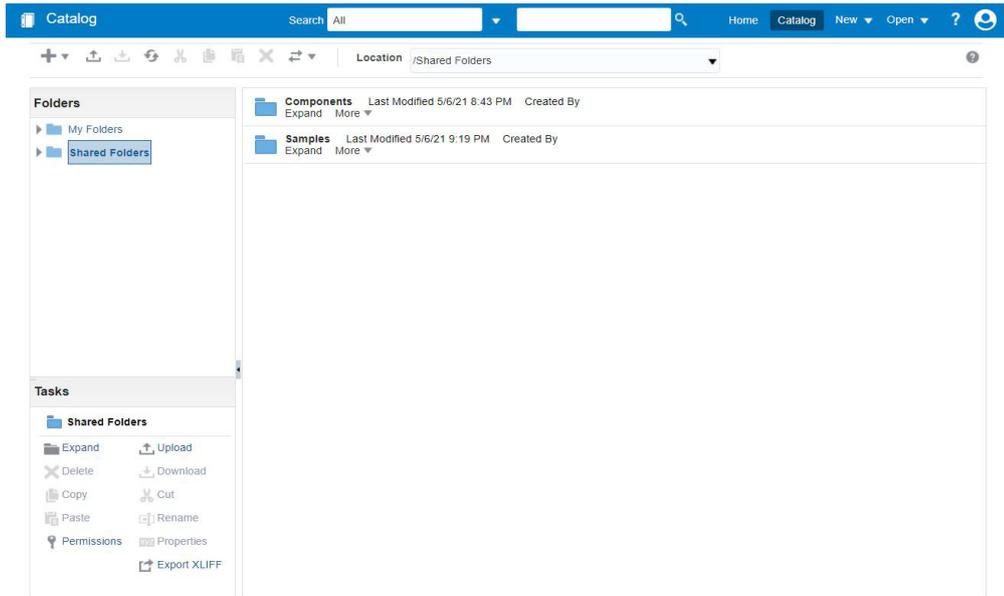
6. The following window is displayed. Browse to the location where the oracle.xdrz file is saved. Click the 'Overwrite Existing File' check box if you are overwriting an existing directory.
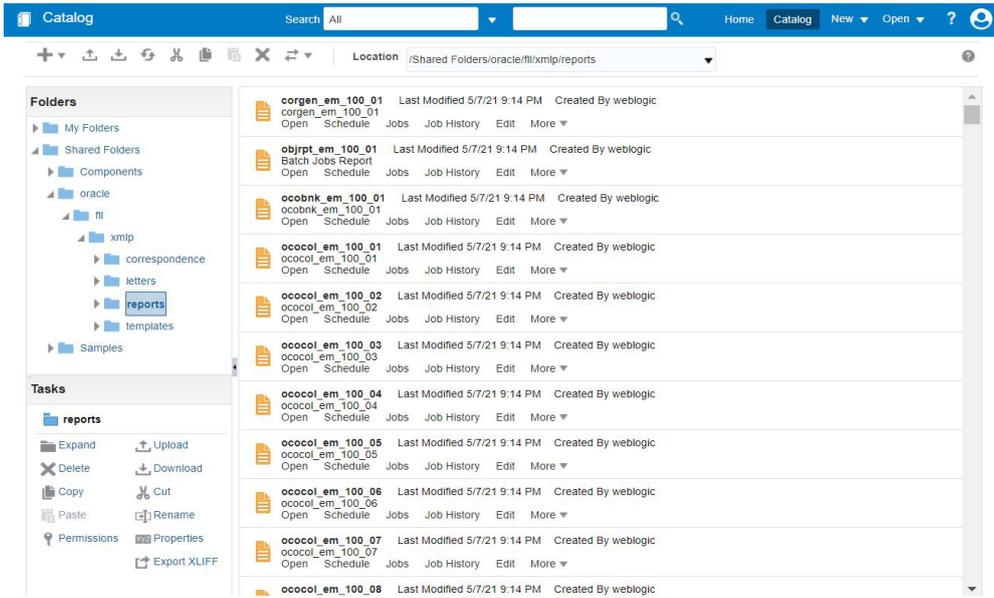
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7. Click on 'Upload'.
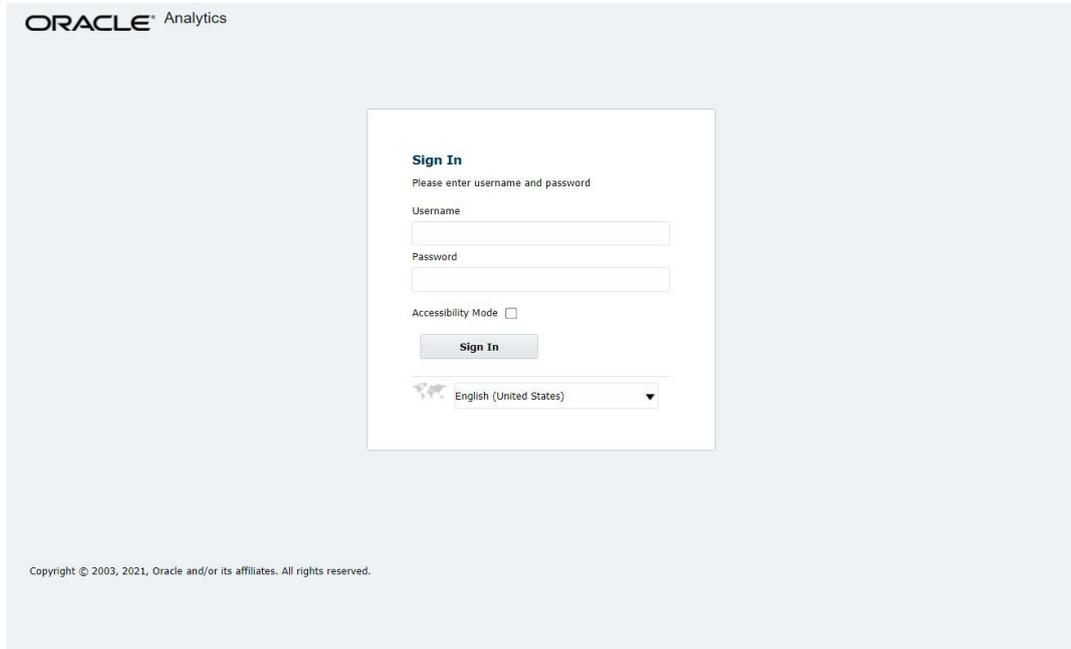

8. The following window is displayed.

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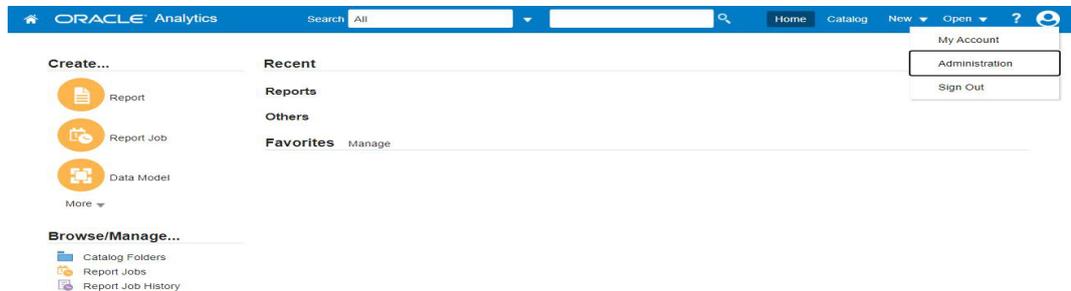
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6. Configure MDB Mail Server

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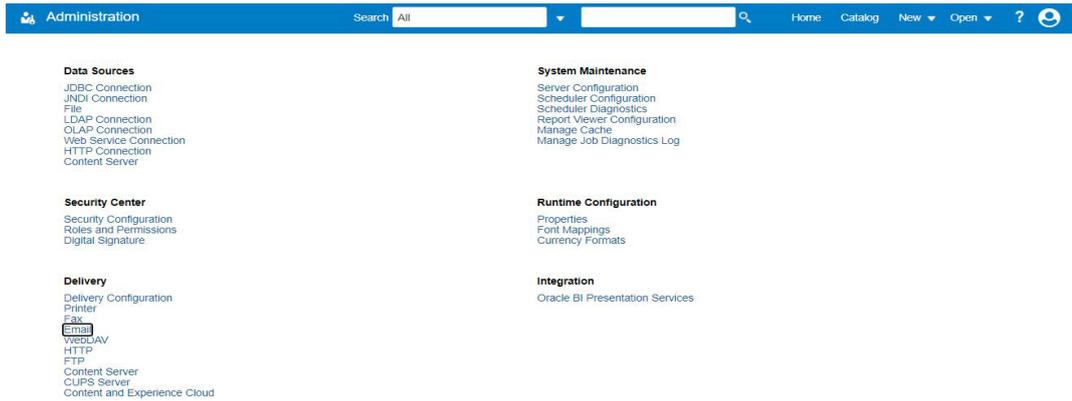
1. Launch the Oracle Analytics Publisher application (http://hostname:port/xmlpserver). The following window is displayed.
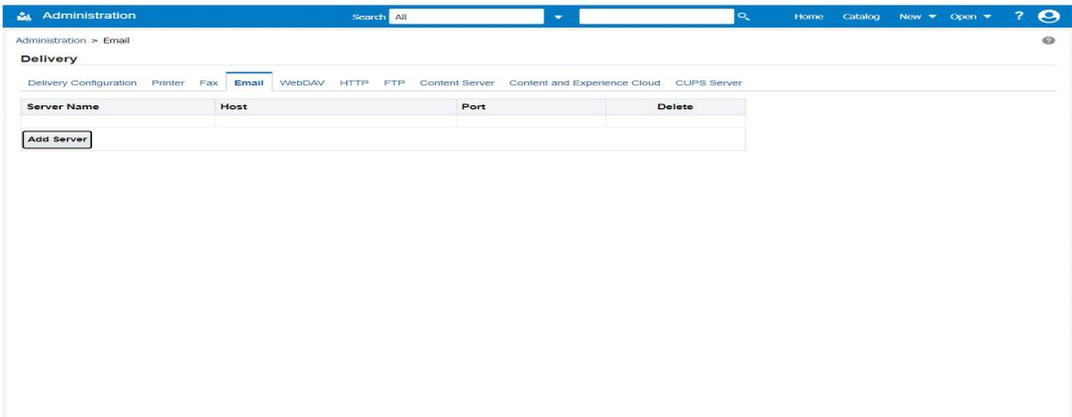

2. Login using the valid credentials. The following window is displayed.
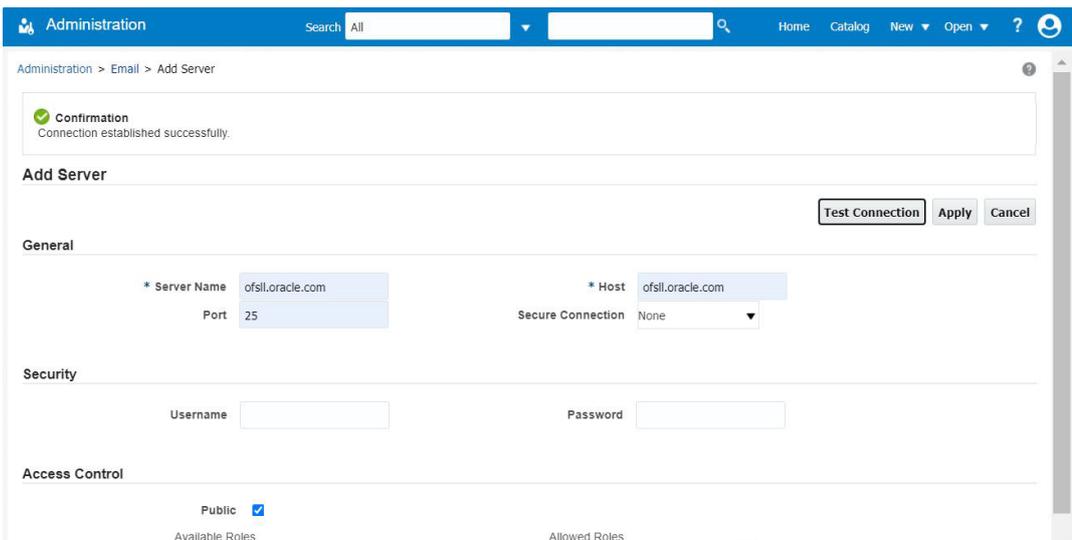
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3. Click 'Administration'. The following window is displayed.

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

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

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

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

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

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