

# Oracle® Financial Services Lending and Leasing

## Upgrade Installation Guide



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ORACLE®

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# Preface

This topic contains following sub-topics:

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## Purpose

For recommendations on security configuration, refer Security Configuration Guide.

This document contains notes and installation steps needed to install an upgrade for Oracle Financial Services Lending and Leasing.

## Prerequisites

It is assumed that an earlier version of Oracle Financial Services Lending and Leasing is installed.

## Audience

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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

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## Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at [Critical Patches, Security Alerts and Bulletins](#). All critical patches should be applied in a timely manner to make sure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

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Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## Conventions

The following text conventions are used in this document:

**Table**    **Convention**

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

## Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

# 1

## Upgrade Oracle Financial Services Lending and Leasing

The following section details the steps to upgrade Oracle Financial Services Lending and Leasing Application.

This topic contains following sub-topics:

- [Upgrading Application Database](#)
- [Upgrade Fusion Middleware](#)
- [Updating the Reports](#)

### 1.1 Upgrading Application Database

An upgrade is a process of updating an existing version to its higher version. For example, upgrading Oracle Financial Services Lending and Leasing from 14.12.0.0.0 to 15.0.0.0.0

This topic consists of the following sections:

- [Upgrade to 15.0.0.0.0](#)

#### 1.1.1 Upgrade to 15.0.0.0.0

Choose **2** as the installer option at the **Selecting the Install Type** stage, then the script runs the upgrade installer.

**Figure 1-1 Command prompt window 1**

```

Oracle Financial Services Lending and Leasing DB Installer

Important Note:
-----
It is recommended to have a OS level user id created on DB server (say ofsl)
before running the installer.

The installer will create the required Tablespace and application schema user.

The default set of subdirectories underneath the home directory creates a couple
of command files needed by the application.

The tables are grouped as follows:

GROUP          DESCRIPTION
-----
org             origination
svc            servicing
cmn            common
txn            transaction
api            import/conversion
adm            setup/administration
arc            archive

Continue? [y/n]: y

Installer Options          Description
-----
1. New Installation        Full installation of OFSL Product
2. Upgrade Installation    Upgrade existing installation of OFSL Product
3. Install DB Objects only Already the DB Schema and tablespaces are available install only DB Objects

Choose an installer option? [1-3]: 2

Installer Options          Description
-----
1. New Installation        Full installation of OFSL Product
X 2. Upgrade Installation    Upgrade existing installation of OFSL Product
3. Install DB Objects only Already the DB Schema and tablespaces are available install only DB Objects

Enter the Oracle Financial Services Lending and Leasing
Home Path? (usually /home/ofsl): 

```

Respond to the prompts and continue. For more details, refer to **Installing Upgrade** section in Database Installation Guide.

While installing the upgrade, the installer performs the following tasks:

1. Stop the running services, if any.

**Figure 1-2 Command prompt window 2**

```

Enter the Oracle userid (schema name) that will own the Oracle Financial Services Lending and Leasing
objects? (This is usually ofslprd): ofslrel

Enter the password for this userid:

Services are still running, cannot load objects.
Stop the Services? [y/n]y

Shutdown the Job Services...

Installing Type objects...
ort_type_cmn.sql

Type dropped.

```

2. In case you see the below prompt to stop the queue for loading objects, press **Y** and press **Enter** to confirm.

**Figure 1-3 Command prompt window 3**

```

Queues are still running, cannot load objects.
Stop the Queues? [y/n]y

Shutdown the queues...

```

3. In case the Schema is EBR (Edition based Redefinition) enabled,
  - You will be prompted as below. Press **Y** and enter to continue.

**Figure 1-4 Command prompt window 4**

```
The schema is editions enabled

If you wish to continue, Please ensure that a new Edition is created and the user has
required privileges to use it.
Continue with Installation? [y/n] : █
```

- Enter the Edition name and press enter. Confirm **Y** when prompted.

**Figure 1-5 Command prompt window 5**

```
Enter the Edition name (For Example OFSLL_R#_P#) : OFSLL_P1

EDITIONNAME=OFSLL_R14X_P1
Okay [y/n]?: Y █
```

4. Install the upgrade.

**Figure 1-6 Command prompt window 6**

```
PL/SQL procedure successfully completed.

PL/SQL procedure successfully completed.

Commit complete.

Commit complete.

Inserting Version Details...

1 row created.

Commit complete.
```

5. Recompile the invalid objects and complete installation.

**Figure 1-7 Command prompt window 7**

```
Recompiling Invalid Objects...

Oracle Financial Services Lending and Leasing DB Object Upgrade Complete.
Log files are located in /scratch/work_area/DEV/OFSLLREL/logs/ofsl1_install_logs
-bash-4.1$ █
```

6. Install the database object of web services by referring to the instructions detailed in chapter 2 **Installing WebServices Database Objects** of WebServices Installation Guide.
7. Grant access/permission by doing the following:



- Grant java file permissions for the directory objects created by executing the script `set_java_perms.sql` available in `dba_utils` folder. For more information, refer to the process detailed in section 2.5 of Database installation guide.
- Post upgrade, you need to execute the following db script available in `dba_utils` folder.
  - To provide access to all the new 'Screens' and/or 'Web Services' for a specific responsibility, execute `set_screen_access.sql`
  - To provide access to all the new Reports, Transactions, Correspondence for a specific responsibility, execute `set_rpt_txn_cor_access.sql`

In the prompt, enter the user responsibility. You can also specify **ALL** to provide screen access to all the users in bulk.

Further, you can customized the access through Setup > User > Access screen as detailed in **Setup Guides**.

#### Note

- Post upgrade, if there are any invalid java stored procedures noticed, please recompile the respective units manually.
- In case where 'Edition based Redefinition' (EBR) is enabled, the default edition of database is to be modified/switched to the new edition. This is to be done by system administrator only after both Database Patch and Webservices Patch objects are installed as mentioned in chapter 2 and chapter 4.2 and when all the database objects are in valid state.

## 1.2 Upgrade Fusion Middleware

There is an infrastructure upgrade required (from 12.2.1.4.0 fusion middleware to 14.1.2.0.0 fusion middleware) when upgrading from OFSLL 14.12.0.0.0 to OFSLL 15.0.0.0.0.

For more information, refer the Application Installation Guide.

## 1.3 Updating the Reports

Refer OAS Installation Guide for details on updating the reports.