Oracle Financial Services Profitability Analytics
Version 5.6
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About this Manual

The Profitability Analytics Business Intelligence application (PFT-BI v 5.6) will be based upon a dedicated reporting mart built from the new Fusion Financial Services Data Model. PFT-BI v5.6 leverages several components of OBIEE technology including Dashboards, Answers. PFT-BI v5.6 includes various Dashboards and Reports for the user to carryout various Profitability based analytics.

Audience

This Manual is meant for use by the Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) System Administrator. It provides step-by-step instructions necessary for installing the Oracle Financial Services Profitability Analytics Product.

Scope

This manual provides a step-wise instruction to install the Oracle Financial Services Profitability Analytics Product in an existing Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9).

Organization of the Manual

The Installation Manual is organized into the following chapters.

Pre Requisites section identifies the hardware and base software environment that is required for a successful installation & functioning of the Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) Solution.

Installing Oracle Financial Services Profitability Analytics v5.6 section details the pre-installation activities followed by a step-by-step instruction on the various installation options.

Post installation Activities section details the steps that are required to be performed after a successful installation of the product.

Conventions Used in this Manual

References to sections or chapters in the manual are displayed in *Italics*.

Screen names are displayed in the following manner:

Introduction screen

Options and buttons are displayed in Bold.

Notes are displayed as follows:

 NOTE

- o It is important that the password should be 6 characters long. If you do not adhere to this pre-requisite, you will see a system message that reads **Password must be at least 6 characters long**.

Pre-Requisites

The installation process requires certain environmental variables to be set prior to starting the installation. You must ensure that these requirements are met before starting the installation. You are requested to refer to the Release Notes for the latest updates on hardware or software requirements and the Platform Installation Manual for the environment variables.

Environment

Installation of Oracle Financial Services Profitability Analytics Product requires the Oracle Financial Services Analytical Applications Infrastructure v7.2 to be installed in either a single-tier or multi-tier environment. It is implicit that all base software versions and patch levels required by the operating systems of Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) is available and adhered to.

The Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) and OBIEE 11.1.1.5.0 on any supported operating system once installed must be configured.

Front-End Access

- Client Machines – Windows 2000 / Windows 2003 / Windows XP

- Internet Explorer 7.0/8.0

- Java Plug-in 1.5.0_03/1.5.0_07/1.6.0_11

- Acrobat Reader 8.0

- Microsoft Office Excel 2003/2007

- The screen resolutions supported are 1024*768 and 1280*1024

NOTE

- o Ensure that Java Plug-in is enabled in the browser settings.

Installing Oracle Financial Services Profitability Analytics Product

Pre-Installation Activities

The following is the Pre Installation checklist to ensure the readiness to start installing Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) Products:

- Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) must be successfully installed and Oracle Financial Services Profitability Management product is installed on the infodom where analytics has to be installed.

- It is implicit that all base software versions and patch levels required by the operating system of Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) is available and adhered to.

- If Infrastructure installation is on multitier environment, Execute the following commands in the DB Layer terminal

    chmod -R 777 < ftpshare folder >

    Navigate to ftpshare folder and set the *umask* shown as below, this will make sure all the new files created will have 666 file permission.

    cd < ftpshare folder >
    umask 0000

- The Config and atomic schema should be two distinct oracle database users.

- Oracle database User for Atomic schema should have the below grants

    GRANT CREATE SESSION TO <ORACLE_USER>;
    GRANT CREATE ANY INDEX TO <ORACLE_USER>;
    GRANT CREATE PROCEDURE TO <ORACLE_USER>;
    GRANT CREATE SEQUENCE TO <ORACLE_USER>;
    GRANT DEBUG CONNECT SESSION TO <ORACLE_USER>;
    GRANT CREATE TABLE TO <ORACLE_USER>;
    GRANT CREATE VIEW TO <ORACLE_USER>;
    GRANT DROP PROCEDURE TO <ORACLE_USER>;
    GRANT CREATE TRIGGER TO <ORACLE_USER>;

- Infodom has to be created & segment mapped to it.

- Infodom should be mapped to an Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) User.

- Login with the newly created user ID and upload the PFT-BI Solution Data Model successfully into the Information Domain.

    NOTE
    - If any other solution is already installed in an Infodom (atomic schema), then we need to perform Incremental Model Upload by merging the new model with already uploaded model.

- Application and Source creation

1. Create one Application

2. Create a RDBMS Source - pointing to the atomic database and date format should be set as mm-dd-yyyy.

3. Map the data source to the application created and generate source model

- All Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) Servers must be shut down.

- Oracle 11g service must be running.

You must have the following information available and handy before you start the installation:

- The **FTP share path** as configured in Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9).

- The name of the **Information Domain** in Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) into which the Oracle Financial Services Profitability Analytics data model has been uploaded.

- The Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) **User ID** that has access to the above Information Domain.

For information on how to configure the OLAP Server, see *Oracle Financial Services Analytical Applications Infrastructure (OFSAAI) Installation and Configuration Guide Release 7.2.*

Oracle Financial Services Profitability Analytics Product V5.6 Installation

The Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) Product comprises of components that are installed in the Application & Database layer. Hence if you have installed **Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9)** in a multi-tier architecture, the Oracle Financial Services Profitability Analytics Product installer must be invoked on each of the machines that host the Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) tier.

For a Single-tier installation, the installer is required to be invoked only once on the machine that hosts all the Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) tiers.

This section describes the installation process where the Two Product setup components are installed on separate machines in with the Product installation on separate machines. Machine A will be used to install Product Application Layer components, Machine B will be used to install Product Database Layer components.

 NOTE

o This section holds applicable if **Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9)** is installed on separate machines A and B respectively.

Machine A – Product App Layer

Step 1

Copy the Setup.bin and Setup.sh to a folder on the machine that hosts the Oracle Financial Services Analytical Applications Infrastructure application. To begin Oracle Financial Services Profitability Analytics product installation, execute Setup.sh.
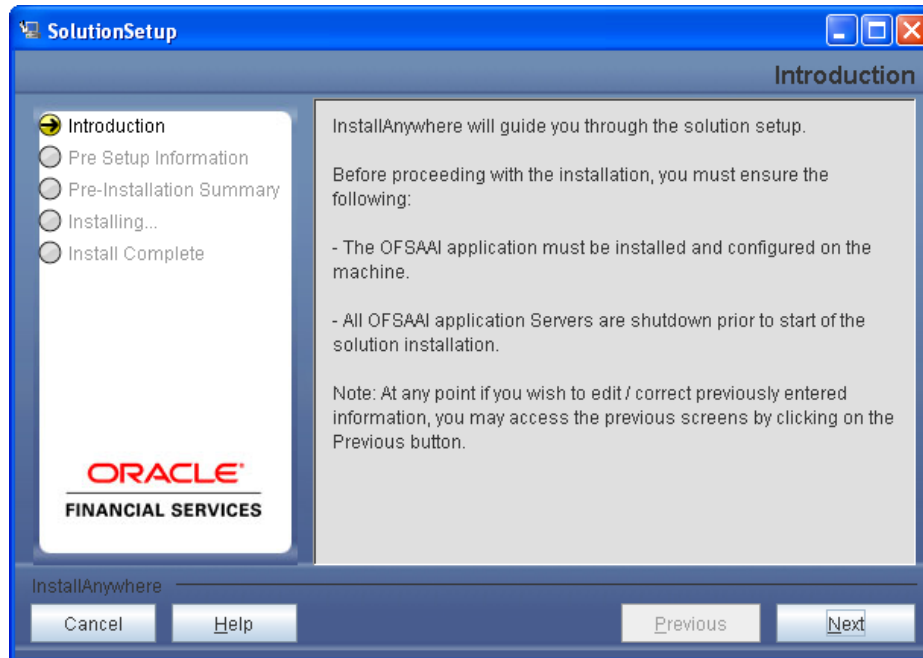

Figure 1:   Installation Splash Screen

Step 2

Figure 2:   Figure 1: Introduction Screen

Upon invoking the installer, the **Introduction** screen will display the pre-requisites for installation. Ensure that the pre-requisites are satisfied before you proceed.

Click **Next** to continue

Step 3

Please choose the log mode for this installer. In case if the Debug is selected, the Passwords will be printed in the Log File ($FIC_HOME\SolutionsLog.log).
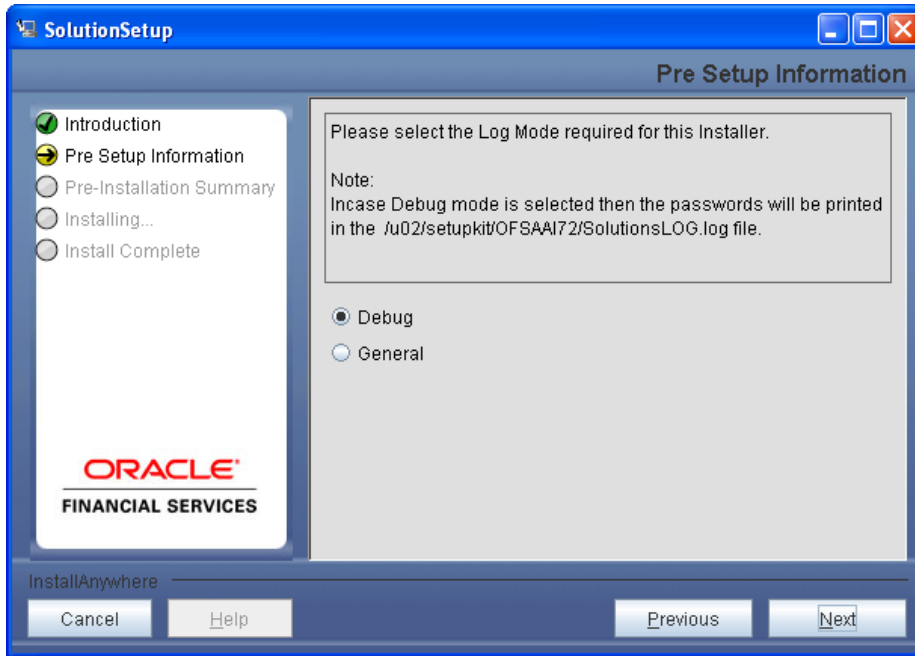
Figure 3:   Figure 2: Log Mode Option Screen

NOTE

- o SolutionsLOG.log name format will be PFTBI_<INFODOM_NAME>_SolutionsLOG-<DATE>-<TIME>.log

Click **Next** to continue

Step 4

Please provide the 9 digit Customer Identification number provided during the platform installation.
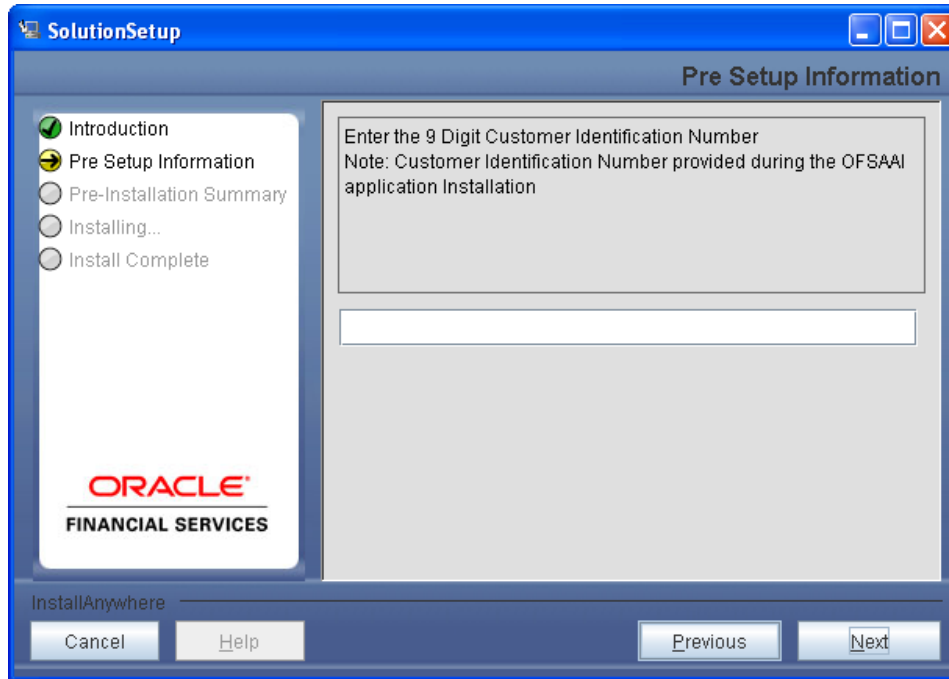
Figure 4:   Customer ID Input Screen

Step 5

The **Pre Setup Information** screen requests for setup information.

Select the appropriate Oracle Financial Services Analytical Applications Infrastructure layer that has been installed on the machine.

Example **AppLayer**

Click Next to continue

 NOTE

- o   For a single-tier Oracle Financial Services Analytical Applications Infrastructure 7.2 installation, you must select App Layer, DB Layer. For a multi-tier Oracle Financial Services Analytical Applications Infrastructure 7.2 installation, select the corresponding layer installed on the machine**.**
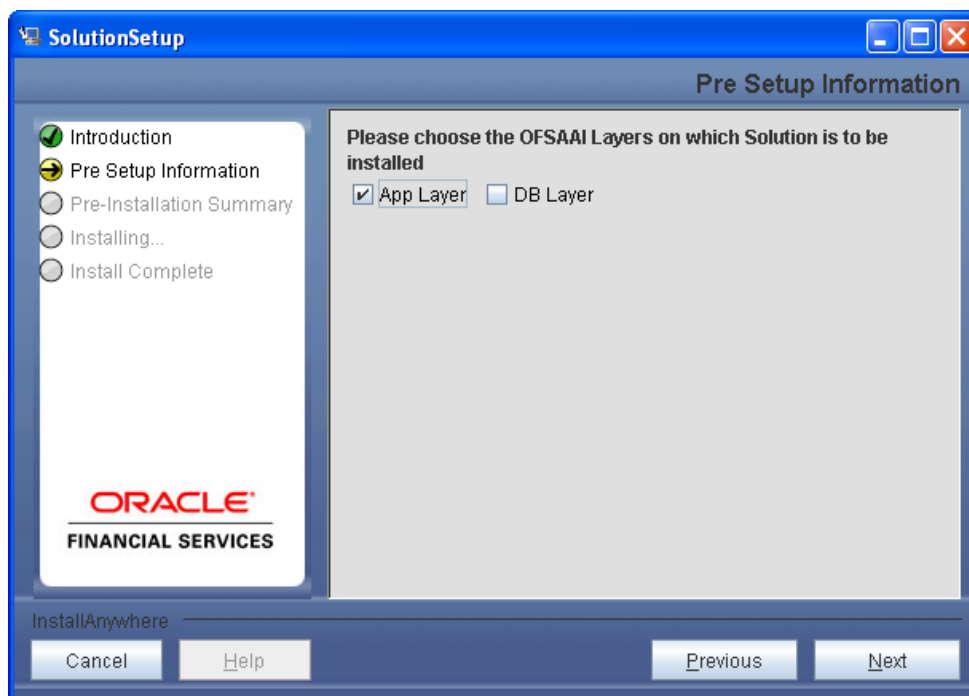
Figure 5:   Pre Setup Information Screen – Choose Layer to Install

Step 6

Enter the Information Domain in which the Oracle Financial Services Profitability Analytics data model has been successfully uploaded and Segment name which is mapped with the infodom.

Enter the valid path that has been configured as the FTP Share Path in Oracle Financial Services Analytical Applications Infrastructure 7.2.   You may click **Choose** to select the path. Click **Restore Default** to reset the path in case of erroneous entry.

Enter the TNS name for the atomic schema (Same as what you've given in Database Master while creating the infodom)

Click **Next** to continue.
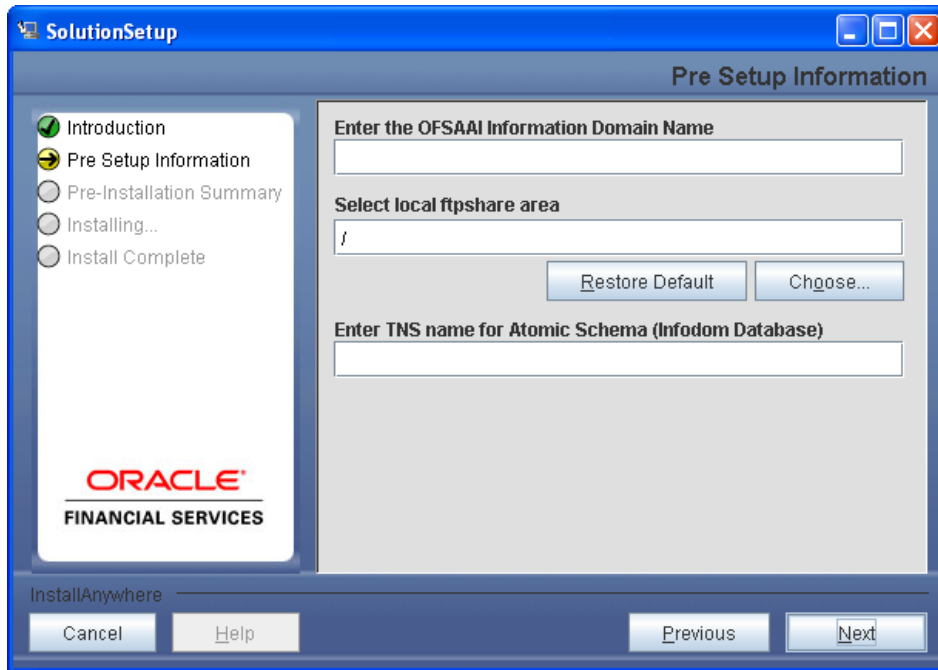
Figure 6:   Pre Setup Information Screen – Infodom Details

Step 7

The Pre Setup Information screen requests for the Oracle Business Intelligence installed host machine IP, port number and context name. Please enter the same.

Click **Next** to continue
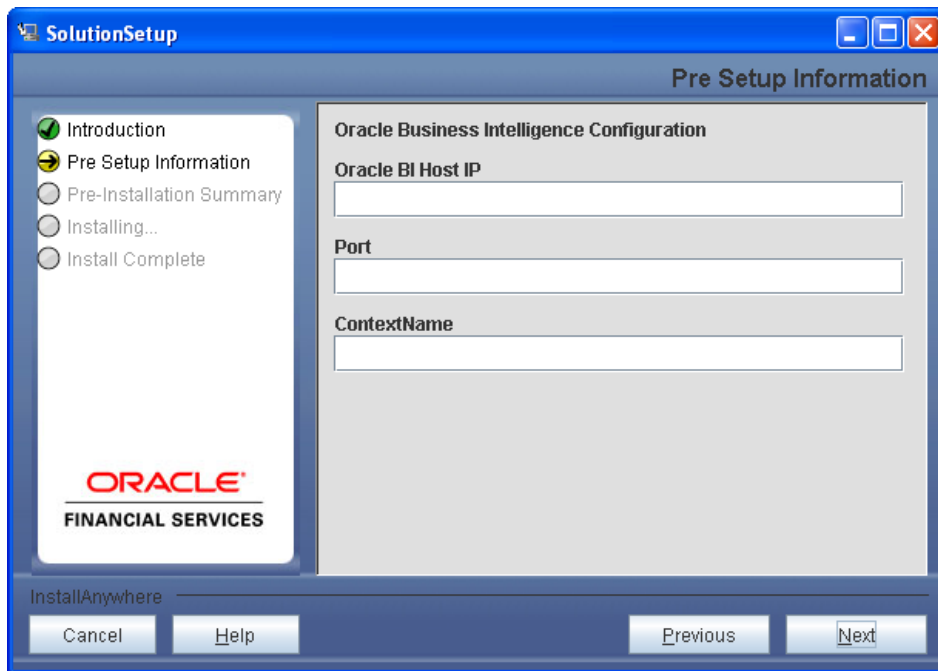
Figure 7:   Pre Setup Information Screen – Oracle Bussiness Intelligence Details

Step 8

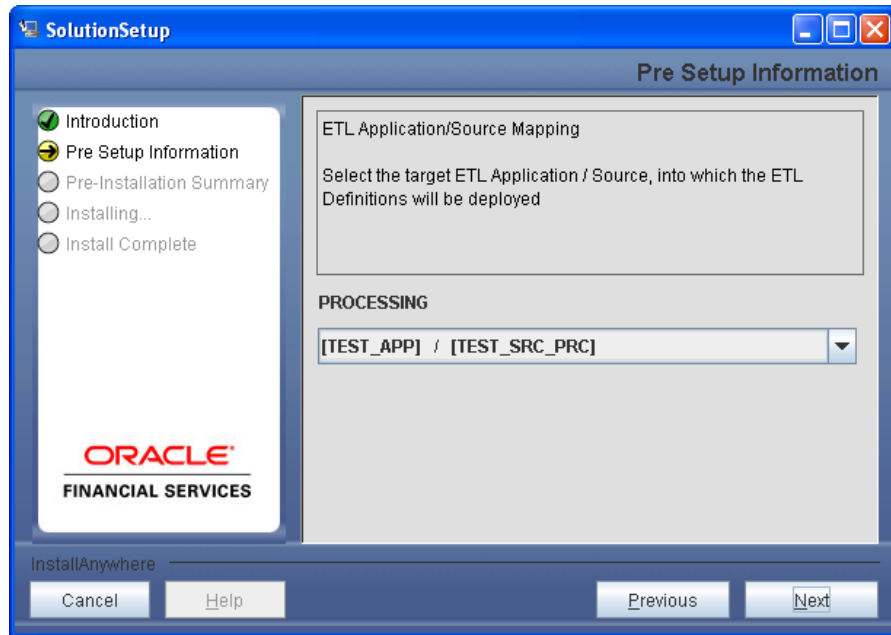Select the application / source pair which has the source you have created for PROCESSING in the second dropdown.

Click **Next** to continue

Figure 8:   Pre Setup Information Screen – ETL Application/Source Details

Step 9

The **Pre Setup Information** screen requests for the Oracle Financial Services Analytical Applications Infrastructure user ID.

Enter the Oracle Financial Services Analytical Applications Infrastructure user ID that has been mapped to the Information Domains provided earlier.
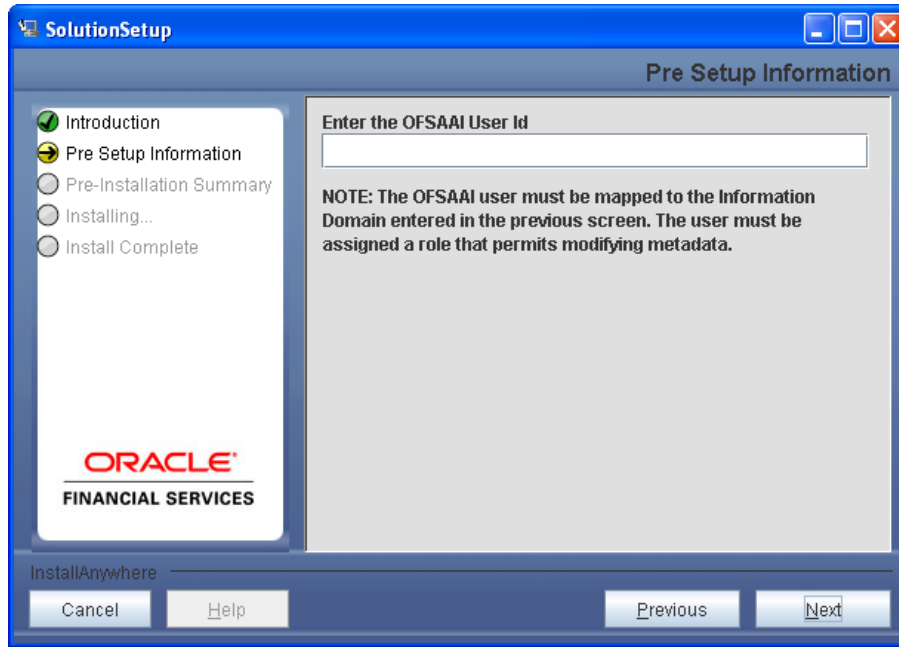
Figure 9: Pre Setup Information screen – Oracle Financial Services Analytical Applications Infrastructure User Details

Click **Next** to continue

Step 10

The Pre-Installation Summary screen outlines the general information about the set up
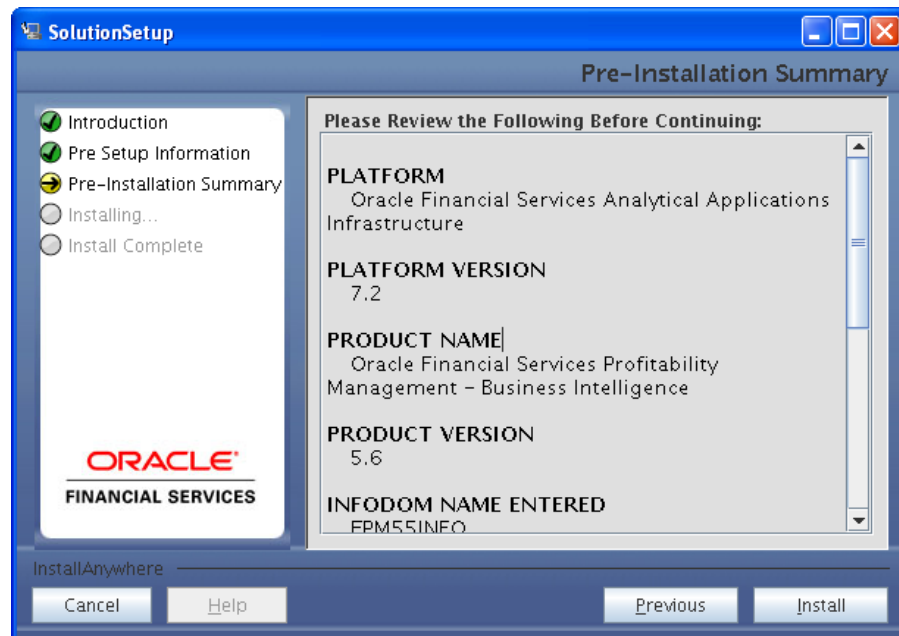

Figure 10: Pre Installation Summary – Oracle Financial Services Analytical Applications Infrastructure User Details

Pre Installation Summary screen will display the Platform name, Platform Version, Product name, Product Version, Infodom name, Segment name etc. If you want to edit the input values like Infodom name, Segment name you can do the same by clicking Back Otherwise

Click **Install** to continue.

Step 11

The following screen displays the progress of the installation. Upon completion of the process, the installation status is published on the screen. You must access the file SolutionLOG.log in the path $FIC_HOME to check for errors if any.

 NOTE

- o FIC_HOME is the environment variable set during the Oracle Financial Services Analytical Applications Infrastructure platform Installation; it refers to the Oracle Financial Services Analytical Applications Infrastructure Installation directory.
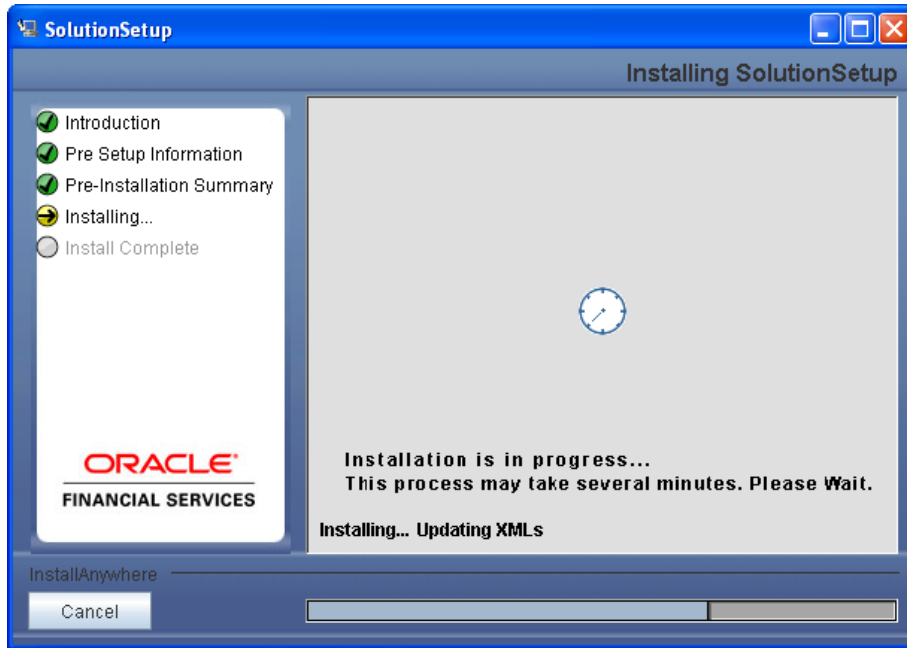

Figure 11:   Installation in Progress

Step 12

The following screen displays the successful installation of the Oracle Financial Services Profitability Analytics product Setup.
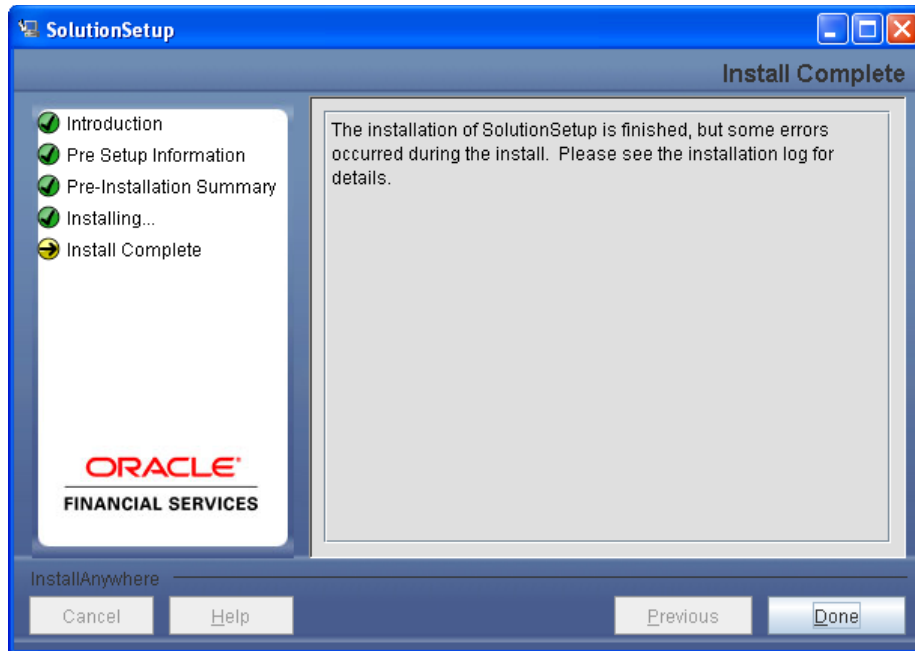
Figure 12:   Installation Complete

Click **Done** to quit the installer.

Machine B – Product Database Layer

Step 1

Copy the Setup.bin and Setup.shs to a folder on the machine that hosts the Oracle Financial Services Analytical Applications Infrastructure application. To begin Oracle Financial Services Profitability Analytics Product installation, execute Setup.sh
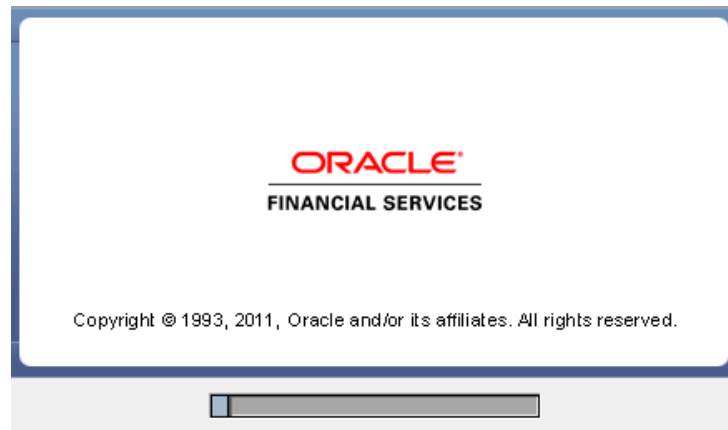

Figure 13:   Installation Splash Screen

Step 2

Figure 14:   Introduction Screen

Upon invoking the installer, the **Introduction** screen will display the pre-requisites for installation. Ensure that the pre-requisites are satisfied before you proceed.

Step 3

Please choose the log mode for this installer. In case if the Debug is selected, the Passwords will be printed in the Log File ($FIC_HOME\SolutionsLog.log).
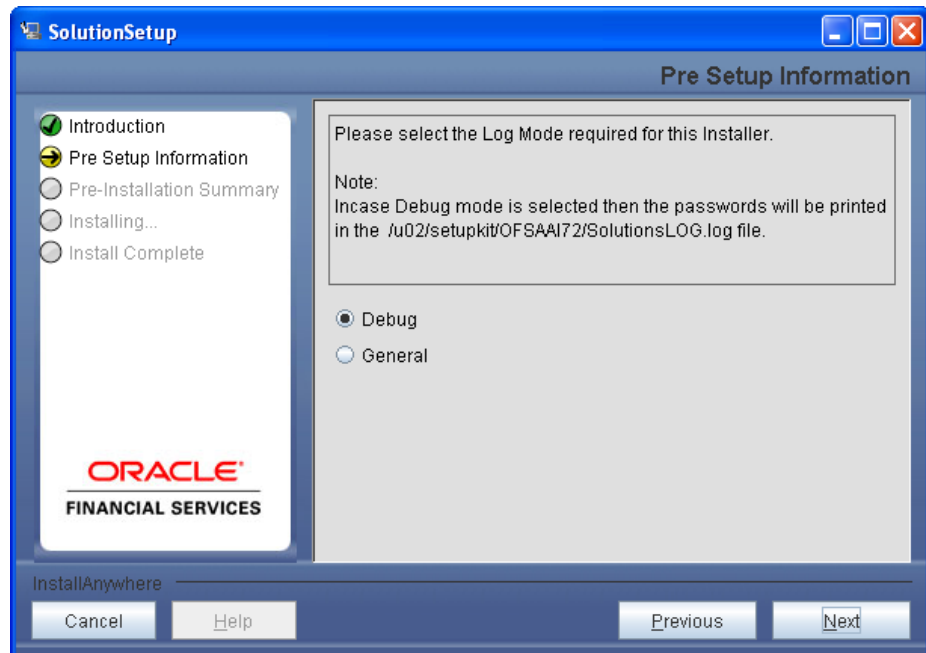
Figure 15:   Log Mode Option Screen

NOTE

- o SolutionsLOG.log name format will be PFTBI_<INFODOM_NAME>_SolutionsLOG-<DATE>-<TIME>.log

Step 4

Please provide the 9 digit Customer Identification number provided during the platform installation.
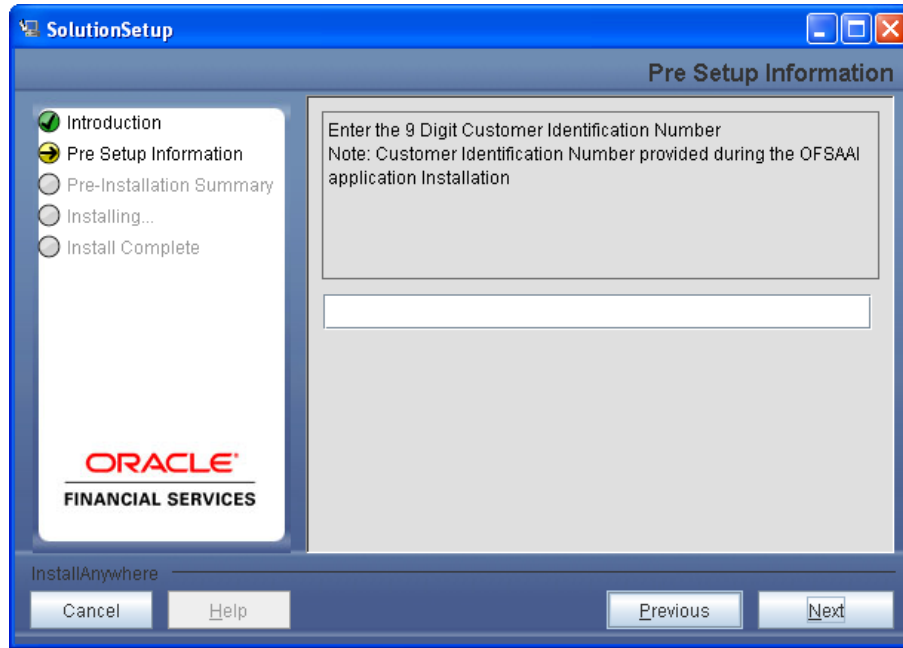

Figure 16:   Customer ID Input Screen

Step 5

The **Pre Setup Information** screen requests for setup information.

Select the appropriate Oracle Financial Services Analytical Applications Infrastructure layer that has been installed on the machine.
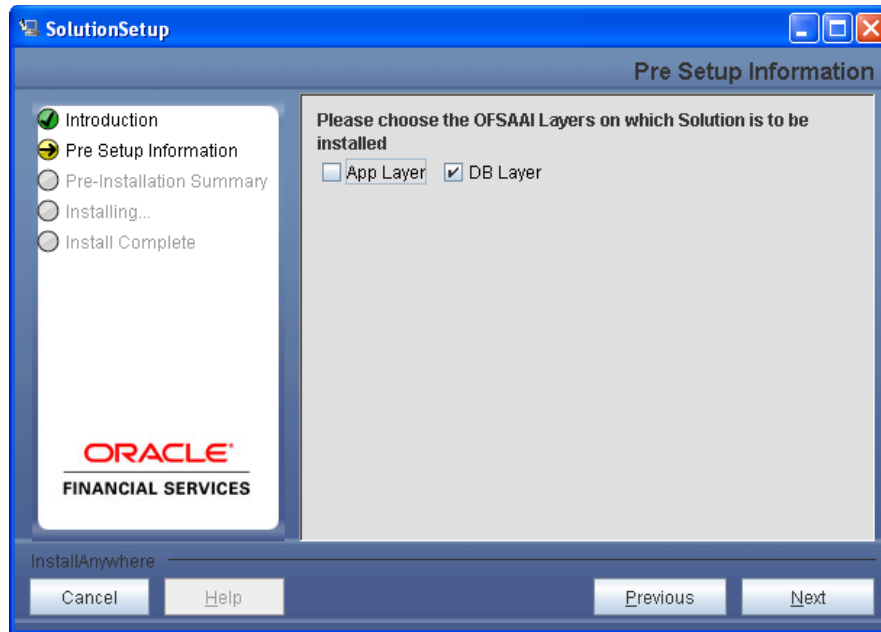
Example DB Layer

Figure 17: Pre Setup Information Screen – Choose Layer to Install

NOTE

o For a single-tier Oracle Financial Services Analytical Applications Infrastructure 7.2 installation, you must select App Layer and DB Layer. For a multi-tier Oracle Financial Services Analytical Applications Infrastructure 7.2 installation, select the corresponding layer installed on the machine.

Click **Next** to continue

Step 6

Enter the Information Domain in which the Oracle Financial Services Profitability Analytics data model has been successfully uploaded.

Enter the valid path that has been configured as the FTP Share Path in Oracle Financial Services Analytical Applications Infrastructure 7.2. You may click **Choose** to select the path. Click **Restore Default** to reset the path in case of erroneous entry.

Enter the Config schema user ID. Also enter the Config schema db driver details and the connection URL. (DB driver and the connection urn can be taken from the Dynamic services.xml in the $FIC_HOME/conf folder of the app layer.

Enter the TNS name for the atomic schema (Same as what you've given in Database Master while creating the infodom)
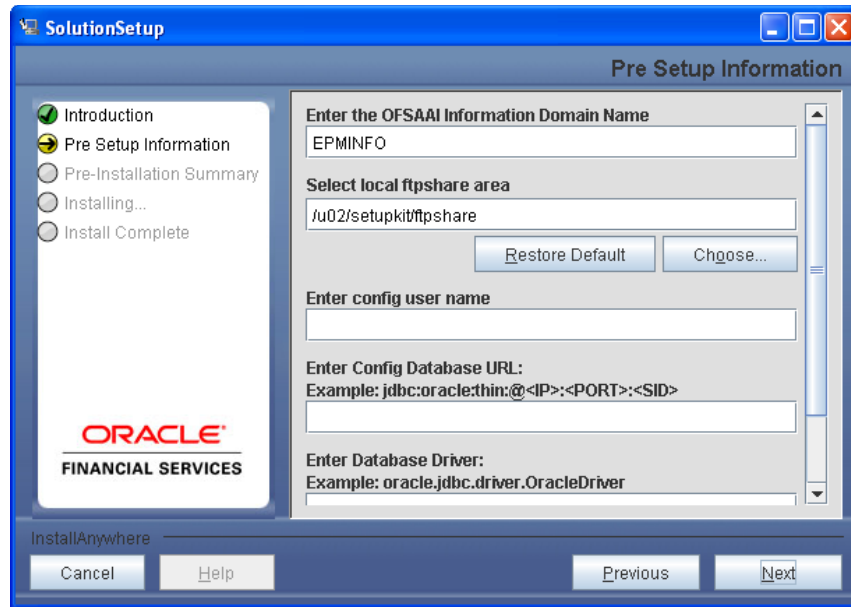
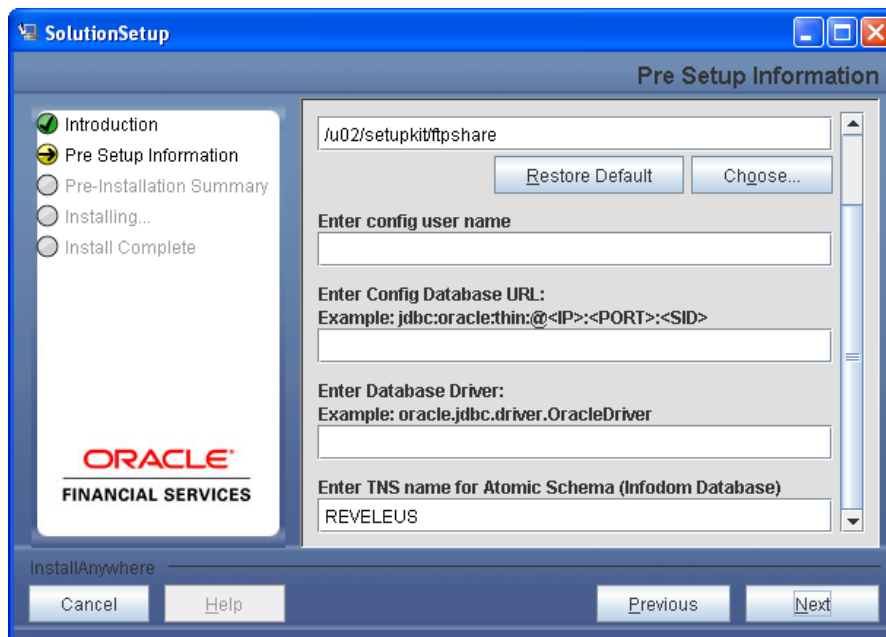**Figure 18:   Pre Setup Information Screen – Database Details I**

Figure 19:   Figure 3: Pre Setup Information Screen – Database Details II

Step 7

The **Pre Setup Information** screen requests for the Oracle Financial Services Analytical Applications Infrastructure user ID.

Enter the Oracle Financial Services Analytical Applications Infrastructure user ID that has been mapped to the Information Domains provided earlier.
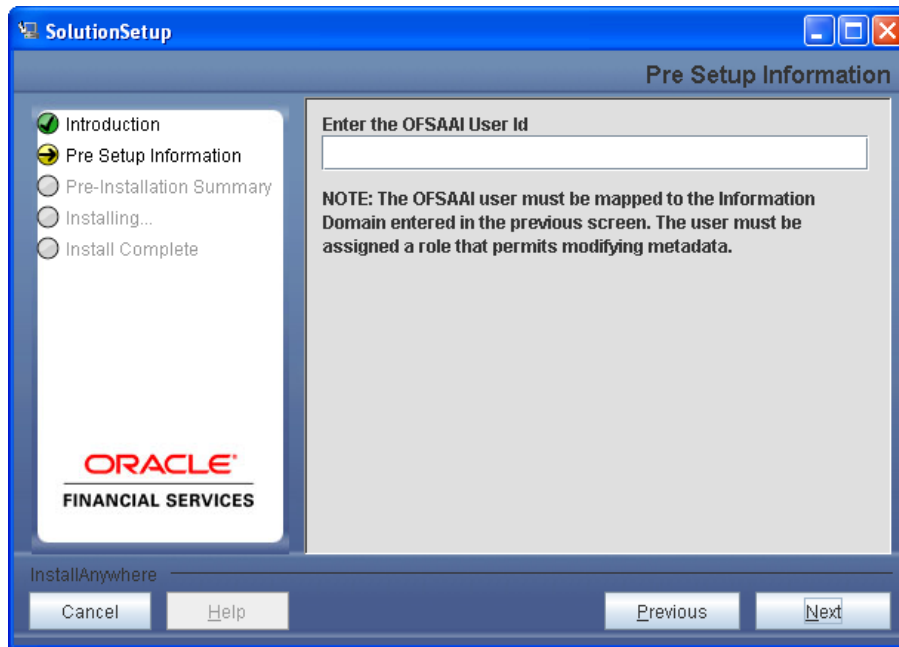
Figure 20: Pre Setup Information screen - Oracle Financial Services Analytical Applications Infrastructure User Details

NOTE

o The Oracle Financial Services Analytical Applications Infrastructure user must have a role that is able to perform Add/Modify functions for PFT-BI metadata.

Click **Next** to continue.

Step 8

The Pre-Installation Summary screen outlines the general information about the set up
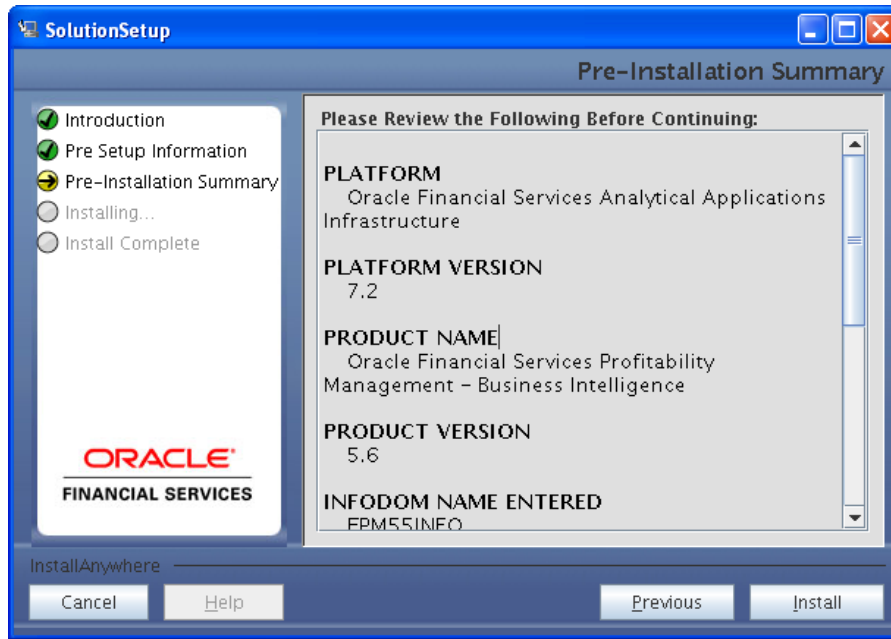
Figure 21:   Pre Installation Summary – Oracle Financial Services Analytical Applications Infrastructure User Details

Pre Installation Summary screen will display the Platform name, Platform Version, Product name, Product Version, Infodom name, Segment name etc. If you want to edit the input values like Infodom name, Segment name you can do the same by clicking Back Otherwise

Click **Install** to continue.

Step 9

The following screen displays the progress of the installation. Upon completion of the process, the installation status is published on the screen. You must access the file SolutionLOG.log in the path $FIC_HOME to check for errors if any.
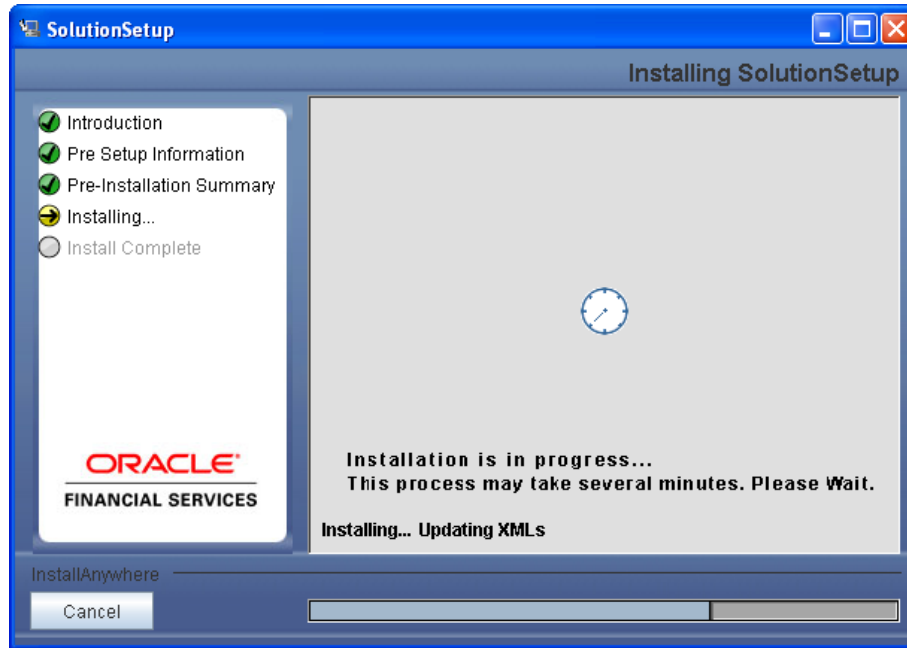

Figure 22: Installation in Progress

NOTE

- o FIC_HOME is the environment variable set during the Oracle Financial Services Analytical Applications Infrastructure Platform Installation; it refers to the Oracle Financial Services Analytical Applications Infrastructure Installation directory.

Step 10

The following screen displays the completion of installation of the Oracle Financial Services Profitability Analytics Product Setup.
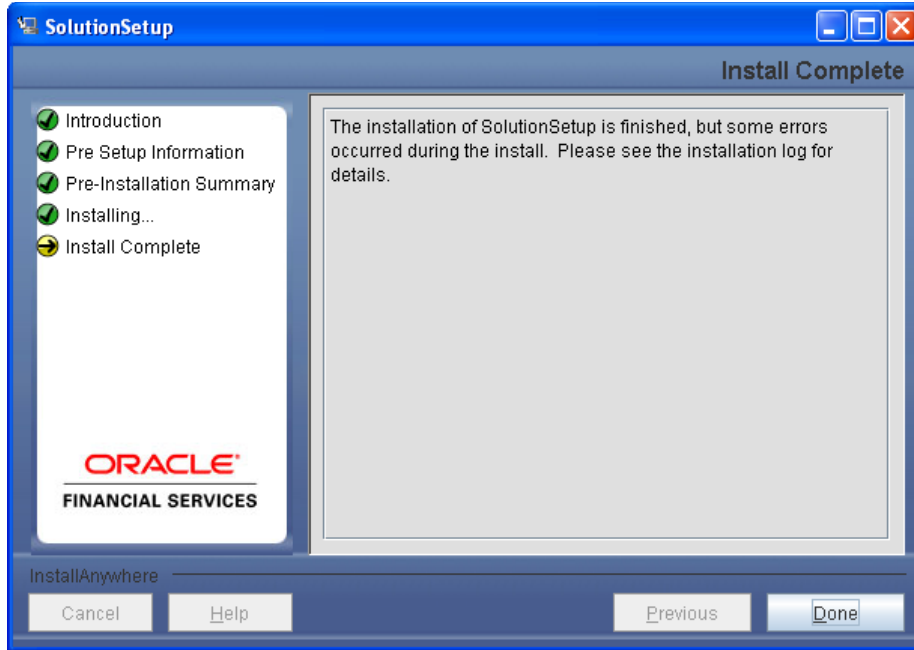
Figure 23:   Installation Complete

Click **Done** to quit the installer.

Silent Installation

Silent installation is achieved via a properties file [Silent.props] that must be updated with proper values, before attempting to install using the silent mode.

The following table lists all the properties that need to be specified

Property Name	Description of Property	Permissible values	Comments
LOG_MODE	Mode for logging	0 = Debug 1= General	Optional; Default : 0
INFODOM_NAME	Information domain in to which the application will be installed	Not Applicable	MANDATORY
OFSAAI_USER_ID	A valid OFSAAI user-id	Not Applicable	MANDATORY
FTP_SHARE_PATH	Absolute FTP Share path	Not Applicable	MANDATORY
CUSTOMER_ID	Customer id specified while installing OFSAAI	Not Applicable	MANDATORY
TNS_NAME	The TNS Entry used to access the configuration/application schema of the OFSAAI installation	Not Applicable	MANDATORY
INSTALL_DB	Install database-tier components	0 = No 1 = Yes	Default : 0
INSTALL_APP	Install Application-tier components be installed	0 = No 1 = Yes	Default : 0
RAC_JDBC_URL	The JDBC URL to be used in case of a RAC setup	Not Applicable	Applicable if INSTALL_DB=1 AND INSTALL_WEB=0 AND INSTALL_APP=0
ORA_HOST	Host Name of the database server on which the Configuration Schema is present	Not Applicable	Applicable if INSTALL_DB = 1; Ignored if RAC_JDBC_URL has a value specified

ORA_PORT	Port number of the TNS Listener for the above database Host	Not Applicable	Applicable if INSTALL_DB = 1; Ignored if RAC_JDBC_URL has a value specified
ORA_SID	SID of the above database	Not Applicable	Applicable if INSTALL_DB = 1; Ignored if RAC_JDBC_URL has a value specified
CONFIG_USER	User-id of the OFSAAI configuration schema	Not Applicable	Applicable if INSTALL_DB=1 AND INSTALL_APP=0
OBI_HOST	Host Name of the OBIEE Server	Not Applicable	Applicable if INSTALL_ADMIN_BI=1
OBI_PORT	Port Number of the OBIEE Server	Not Applicable	Applicable if INSTALL_ADMIN_BI=1
OBI_CONTEXT	Context Name of the OBIEE Server	Not Applicable	Applicable if INSTALL_ADMIN_BI=1
ETL_APPLICATION	The ETL application name	Not Applicable	
ETL_SOURCE_PROCESSING	The ETL Source into which the Table-2-Table ETL definitions on processing tables will be deployed	Not Applicable	This Source must be mapped to the above ETL Application

How to install in Silent Mode

- The installer folder contains a template file "Silent.template"
- Create a copy of this file and rename the copy as "Silent.props"
- Edit the file "Silent.props" and specify the parameters as per the requirements
- On the UNIX Command prompt, execute the following command
    - "./Setup.sh SILENT"
- Refer to the console log [or the file preinstall.log] for any error messages.

Post Installation Activities

Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) Server Memory Configuration

The Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) Application Server is started using reveleusstartup.sh. This file can be edited for setting customized memory settings, garbage collector settings depending on the available hardware configuration. You are requested to contact Oracle Financial Services Analytical Applications Infrastructure v7.2 (Release No - 7.2.9) Support at support@reveleus.com.for guidance in altering the memory settings.

Once the installation of Oracle Financial Services Profitability Analytics Product is completed, you must perform the following steps.

- Check the Log files SolutionsLOG.log, SolutionSetup_InstallLog.log under $FIC_HOME.

NOTE

  o SolutionsLOG.log name format will be PFTBI_<INFODOM_NAME>_ SolutionsLOG-<DATE>-<TIME>.log

- Please ignore the Unique key/ primary key violated constraints.

- Start all Oracle Financial Services Analytical Applications Infrastructure v7.2(Release No - 7.2.9) Servers.

- Recompile any invalid Functions, procedures and views.

- Refer Oracle Financials Services Profitability Analytics v5 6-Configuration Note.doc for configuration of RPD and Catalog for Oracle Business Intelligence Enterprise Edition.

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Installation Manual

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