Oracle Financial Services Retail Performance Analytics

OBIEE Deployment Guide

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OFS Retail Performance Analytics OBIEE Deployment Guide

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Document Control

Version Number	Revision Date	Change Log
1.0	October 2020	Created the document with instructions for deploying the OFS RPA Report Analytics for the release 8.0.5.0.3.

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1 Data Visibility

This has been implemented with the set of tables and OBIEE roles. Roles Created in OBIEE is to restrict data based on Manager Hierarchy.

1.1 Creating OBIEE Roles

To accomplish these, follow these steps:

- **1.** Open Admin Console of OBIEE.
- 2. Click on Security Realms under Domain Structure.
- 3. Click on myrealm under Realms.

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4. Click on Groups tab of User and Groups.

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Were changes and restarts	Home - Surroway of Security Station of	rynamic claims and through charings forduit. Currently of tecority features conjustic citizenses of	Security feature congregation
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5. Click on **New** and create new user group as 'Restricted Access'.

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View changes and restarts	None channey of Security Realine	Rome schummung of Smarthy Realines umgeschen and Disages unbestehend Roman				
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Look & East	on lower					
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- Security Realine 8: Interspendulty	How would you like to describe the	ner Group?				
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	Presiden	Default-urbenticator 🕶				
Now do Lu	(de) (Second					
 Create groups 						
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 Delete prope 						
A LONG LONG						

6. Create a new user under **Users** tab of **Users and Groups**.

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7. Map the newly created users to 'Restricted Access' group, which need Data Visibility.

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Point Point Point	Domain Structure	Use the page to configure group membership for the user.			
	Boundary Factoria Boundary Factoria Description Description Description Service Service Service Service Service Service Service Service	Parada Groupe Channe Andréa Chancellanes Radio Chancellanes Administration Radio Chancellanes Administration Radio Chancellanes Bal SM Radio Chancellanes Ball SM Radio Chancellanes	This case can be a mandee of any of these parent groups. Here below		

- 8. Close the Admin Console of OBIEE.
- 9. Open Enterprise Manager of OBIEE.
- 10. Click on **biinstance** under Business Intelligence.

ORACLE' Enterprise Manager Fusion Midd	leware Control 12c	🛐 WebLogic Domain 🔻 🛛 weblogic 👻 🛸
Target Navigation	E	② ↓ 5.4×5 2000 3.21×60 PM ST 2
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Im Metadela Repositories	ma kimout being prompted to kg in again at each of them. If 360 is invalved them Uracid business intelligence will not obtain denot-lanalytics.	professor to automotication and we assume the user has aready been automoticated by

11. Click on **Security** under **biinstance**.



- **12.** Click on **Configure and Manage Application Roles** to create Application Roles.
- **13.** Click on **Create** and name as **OFSAA CI Data Visibility MGR** role . Ensure to use the same name as it is referenced in RPD failed to do this should have access to all reports data.

Create Application Role	
Role (or Entermise Role) is the aroun of users designed at the entermise level and typically	used to assign a privilege or permission. A role can also contain other roles as members.
General	
Application Stripe obi	Rote
* Role Name OFSAA CI Data Visibility - MGR	
Display Name Users granted this role will have restricted access to data.	
Description	1
Members An application role may need to be mapped to users or groups defined in enterprise LDAP s	server, or the role can be mapped to other application roles.
Vew * + Add 🔀 Delete 🔛 Detach	
Name	
No groups or application roles added.	
4	

14. Map the user group, which need data visibility to the OFSAA CI Data Visibility – MGR.

biinstance 0	ance instance v				
Application Roles	used by security a	ware applications t	hat are specific to the	e application. These roles are seeded by applications in single global policy store when the applications are registered. These are also app	
Policy Store Provider					
Search					
Enter search keyword for role i	ame to query role	is defined by this a	oplication. Use applic	cation stripe to search if application uses a stripe that is different from application name.	
Ap	plication Stripe	obi	~		
	Dole Name	Starts With w			
Vew w Sill Create	IN Create Lik	e., / Edit.,	X Delete		
-		,	~		
E.					
Role Name		Display Name		Description	
BIServiceAdministrator		BI Service Adminis	trator	This role confers privileges required to administer the sample application.	
BIContentAuthor		BI Content Author		Users with this role can create most types of content.	
BIConsumer		BI Consumer		Users granted this role can consume content but are restricted in what they can create.	
OFSAA CI Data Visibility	MGR	Users granted this	role will have restric.		
A Membership for O	FSAA CI Dat	a Visibility - N	IGR		
Principal	Display Name	Type	D	escription	
Restricted Access	Restricted Acces	s Group	R	estricted access to data	

1.2 Data Population as per Visibility Changes

- **FSI_M_USER**: This table stores all the users that have access to OBIEE. The user id in this table must match the user's login id of OBIEE.
- FSI_M_USER_MANAER_MAP: This table needs only those users details who need Restricted Access. The V_USERNAME has to be inserted with the login username created in OBIEE.
 V_MANGER_CODE has to be inserted with the manager code of the corresponding user from DIM_MANAGEMENT table. V_USER_TYPE will always be updated as 'R' which denotes Restricted Access. Fail to update this table may end up with report errors.

NOTE Users insertion in FSI_M_USER and FSI_M_USER_MANAGER_MAP has to be done directly into the table. For example, in presence of Single Signon System, these tables need to be loaded with data from single signon system directly.

2 Deploying OFS Retail Performance Analytics Report Analytics

The deployment of OFS Retail Performance Analytics (OFS RPA) Report Analytics involves the following tasks:

- Deploying OFS RPA RPD File
- Deploying OFS RPA Catalog Files

2.1 Deploying OFS RPA RPD File

To deploy the RPD file, follow these steps:

1. Copy the RPD file from the following location for the OFS RPA application.

Table 1: RPD File

Application	File Name	Location
RPA	OFSAA_Analytics.rpd	<pre>\$FIC_HOME/OFS_RPA_DASHBOARDS/12.2.1.4.0/datamodel</pre>

- **2.** Paste the copied RPD file in the Windows machine where the OBIEE Windows Administration client is installed and deployed.
- **3.** Open the RPD file online with the default password. The default password is Admin123.
- 4. In the OBIEE Windows Administration client, from the **File** menu, select **Save**.
- 5. Click Yes in the dialog box, Do you want to check global consistency?
- 6. Click **OK** to acknowledge the message, Consistency check didn't find any errors, warning, or best practices violations.

You can ignore the warnings on the consistency check.

2.2 Deploying OFS RPA Catalog Files

To deploy the Catalog files, follow these steps:

1. Copy the Catalog files from the following locations for the OFS RPA application.

Table 2: Catalog Files

Application	File Name	Location
RPA	OFSAA_Analytics.catalog	<pre>\$FIC_HOME/OFS_RPA_DASHBOARDS/12.2.1.4.0/content /catalog</pre>
RPA	OFSAA_Analytics_RPA.ca talog	<pre>\$FIC_HOME/OFS_RPA_DASHBOARDS/12.2.1.4.0/content /catalog</pre>

2. Paste the copied catalog files to a local folder.

- 3. Open the analytics OBIEE URL-(http://<ipaddress>:<port>/analytics) and login with your server credentials.
- 4. Click the **Catalog** link available on the top right corner.
- 5. Click Shared Folders and then click Un-Archive.
- **6.** Browse the path where catalog files are copied in the local folder. Select a file and click **Open**. Then click **OK**. Repeat this for the remaining catalog files.
- 7. Click any of the **Dashboards** and verify if all the reports are available.

3 Post-Installation Steps

After successfully deploying the RPD and Catalog files, perform the following steps:

- 1. Apply the patch **Bundle Patch** for OBIEE 12.2.1.4.0. See the **Readme** packaged with the patch for further instructions on how to install the patch. See the Doc ID <u>2070465.1</u> for more information about the bundle patch.
- 2. Do the following changes in the instanceconfig.xml file:
 - **a.** Backup and edit the instanceconfig.xml file located at:

\$ORACLE_HOME/user_projects/domains/bi/config/fmwconfig/biconfig/OBIPS

Tag to be changed or added	Changes
Change the following tag: <views></views>	<charts> <defaultwebimagetype>flash</defaultwebimagetype> <maxvisiblecolumns>10000</maxvisiblecolumns> <maxvisiblepages>600000</maxvisiblepages> <maxvisiblerows>900000</maxvisiblerows> <maxvisiblesections>600000</maxvisiblesections> <javahostreadlimitinkb>8192</javahostreadlimitinkb> </charts> <cube> <cubemaxrecords>9999999</cubemaxrecords> <cubemaxpopulatedcells>99999999</cubemaxpopulatedcells> </cube>
Change the following tag: <security></security>	<security> <checkurlfreshness>false</checkurlfreshness> <enablesavingcontentwithhtml>true</enablesavingcontentwithhtml> </security>
Add the following tag: <serverins tance></serverins 	<prompts> <maxdropdownvalues>256</maxdropdownvalues> <resultrowlimit>65000</resultrowlimit> <autoapplydashboardpromptvalues>true</autoapplydashboardpromptvalues> <autosearchpromptdialogbox>true</autosearchpromptdialogbox> <autocompletepromptdropdowns> <supportautocomplete>true</supportautocomplete> <caseinsensitive>true</caseinsensitive> <matchinglevel>MatchAll</matchinglevel> <resultslimit>50</resultslimit> </autocompletepromptdropdowns> <shownullvaluewhencolumnisnullable>neverIsNullable> </shownullvaluewhencolumnisnullable></prompts>

Table 3: Tags and Changes for instanceconfig.xml File

- **b.** Save and close the file.
- c. Restart the presentation server for the changes to take effect.
- 3. Do the following changes in the NQSConfig.INI file.

Evaluate function is used in filters of many reports. To support the evaluation function in reports, the value of EVALUATE_SUPPORT_LEVEL must be set as **2** instead of **0** in the NQSConfig.INI file of the OBIEE server present in the

\$ORACLE_HOME/user_projects/domains/bi/config/fmwconfig/biconfig/OBIS
directory.

4 Deploying D3 on OBIEE Server

This section provides detailed steps to install and configure D3, a visualization framework, which is used in a few reports of the OFS RPA application.

To deploy the D3 in the OBIEE server, follow these steps:

1. Copy the analyticsRes folder from \$FIC_HOME/OFS_RPA_DASHBOARDS directory to OBIEE
Server at the following location:

```
$ORACLE HOME/user projects/domains/
```

2. Log in to the WebLogic server, navigate to **Deployments** in your **Domain Structure**, and then click **Install**.

Change Center	🙆 Home Log Out Preferences 🔛 Record Help										
View changes and restarts	Home >Summary of Deployments										
No pending changes exist. Click the Release	Summary of Deployments										
Configuration button to allow others to edit the domain.	Configuration Control Monitoring										
Lock & Edit											
Release Configuration	This page displays the list of Java EE applications and standalone application modules installed to this d										
Domain Structure	You can update (redeploy) or delete installed applications and modules from the domain by selecting the To install a new application or module for deployment to targets in this domain, click Install.										
bi											
Domain Partitions											
Environment	© Customize this table										
B-Services											
Security Realms	Depoyments										
B-Diagostics	Install Update Delete										
- cognoses	🗍 Name 🐟										
	adf.oracle.businesseditor(1.0,12.2.1.1.0)										
	B adf.oracle.domain(1.0,12.2.1.1.0)										
	adf.oracle.domain.webapp(1.0,12.2.1.1.0)										
How do I 🖂	E madmineantra (11 1 1)										
Install an enterprise application											
	E Banalytics										
 Configure an enterprise application 											

Figure 1: WebLogic Administration Console

3. Paste the full path of the D3 directory, select d3 (open directory), and click Next.

Figure 2: WebLogic Administration Console – Locale Deployment

	A						
Change Center	10 Home Log Out Preferences Log	Record Help					
View changes and restarts	Home > Summary of Deployments						
No pending changes exist. Click the Release	Install Application Assistant						
Configuration button to allow others to edit the domain.	Back Anna Print Concel						
Look & Edit							
Release Configuration	Locate deployment to install and prepare for deployment						
	Select the file path that represents th	te application root directory, archive file, exploded archive directory, or application module descriptor that you want to install. You can also enter the path of the appl					
Domain Structure	Note: Only valid file paths are displa	ayed below. If you cannot find your deployment files, Upload your file(s) and/or confirm that your application contains the required deployment descriptors.					
B Domain Partitions	Path:	/scratch/obiee12c/Middleware/Oracle_Home/user_projects/domains/analyticsRes/d3					
8 Environment	Recently Used Paths:	/scratch/objee12c/Mddleware/Oracle_Mome/user_projects/domains/analyticsRes					
8-Services	Current Location:	whithblocin.oracle.com / scratch / object2c / Hiddleware / Oracle_Home / user_projects / domains / analyticsRes					
Security Realms (8) Interoperability (8) -Diagnostics	8 29 d3 (seen directory) Back Next (Finish) (Genoel)						

4. Select Install this deployment as an application and click Next.

Figure 3: WebLogic Administration Console – Installation Type Selection

ORACLE WebLogic Server Ad	ministration Console 12c						
Change Center	🍘 Home Lag Out Preferences 🖂 Record Help						
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments						
No pending changes exist. Click the Release	Install Application Assistant						
Configuration button to allow others to edit the domain.	Back Next Finish Carcel						
Lock & Edit							
Release Configuration	Choose installation type and scope Select if the dealownent should be installed as an application or library. Also decide the scope of this deployment.						
Domain Structure	The application and its components will be targeted to the same locations. This is the most common usage.						
bi 19 -Domain Partitions	Install this deployment as an application						
Deployments	Application libraries are deployments that are available for other deployments to share. Libraries should be available on all of the targets running their referencing applications.						
Security Realms Security Realms Security Realms	Install this deployment as a library						
® Diagnostics	Select a scope in which you want to install the deployment.						
	Scope: Global *						
	Back Next Print Cancel						

5. Select **bi_cluster**, and then select **All servers in the cluster**.

Figure 4: WebLogic Administration Console – Deployment Targets

ORACLE WebLogic Server Ac	Iministration Console 12c						
Change Center	😰 Home Log Out Preferences 🐼 Record Help						
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments						
No pending changes exist. Click the Release Configuration button to allow others to edit the domain. Lock & Edit Release Configuration Domain Structure bi Bi - Domain Partitions Bi - Environment	Install Application Assistant Back Next Finish Cancel Select deployment targets Select the servers and/or clusters to which you want to deploy this application. (You can reconfigure deployment target Available targets for d3 :						
Services Services Services Interoperability Diagnostics	Clusters Cluster AdminServer Di cluster All servers in the cluster Part or the cluster bi_server1						
How do I	Virtual Hosts						
 Start and stop a deployed enterprise application 	bi_internal_virtualhost1						
Configure an enterprise applicationCreate a deployment plan	Back Next Finish Cancel						

6. Select I will make the deployment accessible from the following location (as highlighted in the following screenshot) and click Finish.

ORACLE WebLogic Server Adm	ninistration Console 12c									
Change Center	😰 Home Log Out Preferences 📈 Record Help									
View changes and restarts	Nome >Summary of Deployments >Summary of Services >Summary of Deployments									
No pending changes exist. Click the Release Configuration button to allow others to edit the domain. Lock & Edit Release Configuration	Install Application Assistant Back Next Ensith Cancel Optional Settings You can modify these settings or accept the defaults.									
Domain Structure	* Indicates required fields									
bi B) Domain Partitions B) Environments B) Services B) Interoperability B) Deprosites	General What do you want to name this deployment? *Name: d3 - Security What security model do you want to use with this application? # DD Only: Use only roles and policies that are defined in the deployment descriptors. © Custom Roles: Use roles that are defined in the Administration Console; use policies that are defined in the deployment descriptor.									
How do I	Custom Roles and Policies: Use only roles and policies that are defined in the Administration Console.									
Start and stop a deployed enterprise application Configure an enterprise application	Advanced: Use a custom model that you have configured on the realm's configuration page. Source Accessibility									
Create a deployment plan	How should the source files be made accessible?									
 Target an enterprise application to a server instance 	Use the defaults defined by the deployment's targets									
Test the modules in an enterprise application	Recommended selection.									
System Status	Copy this application onto every target for me									
Health of Running Servers as of 5:32 AM	During deployment, the files will be copied automatically to the Managed Servers to which the application is targeted.									
Failed (0) Critical (0)	I will make the deployment accessible from the following location									
Overloaded (0) Warning (0) OK (2)	Location: /scratch/obiee12c/Middleware/Oracle_Home/user_projects/dc									

Figure 5: WebLogic Administration Console – Optional Settings

7. Click Activate Changes.

Figure 6: WebLogic Administration Console – Summary of Deployments

ORACLE WebLogic Server Adv	ministration Console 12c							
Change Center	🔒 Home Log Out Preferences 🔤 Record Help							
View changes and restarts Pending changes exist. They must be activated to take effect.	Home >Summary of Deploy Messages	ments >Summary of Services >Sum been successfully installed. a the pending changes to commit	nary of Deployments					
Undo All Changes Summary of Deployments								
Domain Structure	Configuration Control	Monitoring						
bi ⊕ Domain Partitions ⊕ Environment ⊕ Services → Security Realms ⊕ Interoperability ⊕ Diagnostics	This page displays the lis You can update (redeplo To install a new applicati Customize this table Deployments Install Update De Name 🖗	t of Java EE applications and star y) or delete installed applications on or module for deployment to t	dalone application modules installed to this domain. and modules from the domain by selecting the checkbox n argets in this domain, click Install .	xt to the application name and then using the	e controls Healt			
How do I	 madf.oracle.busine 	esseditor(1.0,12.2.1.1.0)		Active				
Install an enterprise application Configure an enterprise application Update (redeploy) an enterprise application		n(1.0,12.2.1.1.0) n.webapp(1.0,12.2.1.1.0)		Active Active				
Monitor the modules of an enterprise								

 After activating the changes, the application will now be in a **Prepared** state. Select the **Control** tab. All the installed applications are displayed. Select the application from the **Deployments** table, click **Stop**, and then select **Force stop now** from the drop-down menu.

Figure 7: WebLogic Administration Console – Customize the Deployed Applications

ORACLE WebLogic Server Adr	ministration Console 12c									
Change Center	🔒 Home Log Out Preferences 🔤 Record Help									
View changes and restarts	Home >Summary of Deployments >Summary of Services >Summary of Deployments									
Click the Lock & Edit button to modify, add or delete items in this domain	Summary of Deployments									
Lock & Edit	Configuration Control Monitoring									
Release Configuration	This page displays the list of Java EE applications and standalone application modules installed to this domain.									
Domain Structure	You can start and stop applications and modules from the domain by selecting the checkbox next to the application n	ame and then using the contr	ols on this	page.						
bi Domain Partitions De Environment De ployments De Services	Customize this table Deployments									
Security Realms De-Interoperability	Start > Stop >									
⊕-Diagnostics	Nam When work completes	State	Health	Туре						
	B bi Stop, but continue servicing administration requests	Active	🖉 ОК	Enterprise Application						
	bidatasetsvc	Active	🖋 ОК	Enterprise Application						
		Active	🖋 ОК	Enterprise Application						
How do I	🔲 🗷 bipublisher (11.1.1)	Active	🖉 ОК	Enterprise Application						
Configure an enterprise application	E bisearch	Active	🖋 ОК	Enterprise Application						
Start applications and modules	titech-analysis-application	Active	🖋 ОК	Enterprise Application						
Stop applications and modules	E biwssoa (12.1.3)	Active	🖋 ОК	Enterprise Application						
View the modules of an enterprise application Monitor the modules of an enterprise	coherence-transaction-rar	Active	🖋 ОК	Resource Adapter						
application		Prepared	🖋 ОК	Web Application						

9. Start the application by selecting the check box next to it and then select **Servicing all requests** from the **Start** drop-down menu in the **Deployments** table in the WebLogic Server Administration Console.

Figure 8: WebLogic Administration (Console – Customize the	Deployed Applications
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	ministrati	on Conso	le 12c											
Change Center	🔒 Home Log Out Preferences 🔤 Record Help													
View changes and restarts	Hom	e >Summar	ry of Deployn	nents >Summary	of Services	s >Summar	y of Deplo	oyments						
Click the Lock & Edit button to modify, add or	Summary of Deployments													
delete items in this domain.	Conf	iguration	Control	Monitoring										
Release Configuration	Thi	s page disp	plays the list	t of Java EE app	lications a	and standal	one applic	ation modu	ules installe	d to this d	omain.			
Domain Structure	You	u can start	and stop ap	plications and r	nodules fr	rom the dor	nain by se	lecting the	checkbox	next to the	applicatio	n name and ther	using the contr	rols on this p
bi B-Domain Partitions B-Environment Deployments B-Services Security Realms	Customize this table Deployments Start Stop >													
⊕-Interoperability ⊕-Diagnostics	S	ervicing all ervicing on	requests	ation requests									State	Health
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View the modules of an enterprise application Monitor the modules of an enterprise		coheren	ce-transacti	on-rar									Active	🖋 ОК
application		. ± d3											Prepared	🖋 ОК

10. The application will now change to the **Active** state and is ready to use.

OFSAA Support

Raise a Service Request (SR) in <u>My Oracle Support (MOS)</u> for queries related to the OFSAA applications.

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