Oracle® Financial Services Lending and Leasing
Upgrade Installation Guide

Release 14.12.0.0.0

F74797-01

August 2024

ORACLE®

Oracle Financial Services Lending and Leasing Upgrade Installation Guide, Release 14.12.0.0.0

F74797-01

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Preface

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
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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

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Diversity and Inclusion

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 conventions are used in this document:

Table 1   Conventions used

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

1

Upgrade Oracle Financial Services Lending and Leasing Database

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

- Upgrading Application Database
- 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 14.11.0.0.0 to 14.12.0.0.0

Before you start with the upgrade process, execute the following grants as sys user. This facilitates to have materialized view to be created in OFSLL:

```
grant CREATE MATERIALIZED VIEW TO ${USERID};
```

> **Note:**
>
> Oracle Financial Services Lending and Leasing also supports direct upgrade from 14.10.0.0.0 to 14.12.0.0.0 version.

- To upgrade from 14.11.0.0.0 to 14.12.0.0.0, refer to Upgrade to 14.12.0.0.0 section below.
- To upgrade from 14.10.0.0.0 to 14.12.0.0.0, perform the below steps and then continue with instructions in Upgrade to 14.12.0.0.0 section.

To perform Direct Upgrade from 14.10.0.0.0 to 14.12.0.0.0, do the following:

- In OFSLL 14.12.0.0.0 Release Bundle, navigate to `ofslldb.zip\infrastructure\indexes` and delete the file 'upgrade_in_rel_ofsll_14_12_0_0_0.sql'
- Copy 'upgrade_in_rel_ofsll_14_10_0_0_x_to_14_12_0_0_0.sql' file available under `ofslldb_p8.zip\data_fix` folder to OFSLL 14.12.0.0.0 Release Bundle `\ofslldb.zip\infrastructure\indexes` folder.
- In the folder `ofslldb.zip\infrastructure\tables`, delete the file'upgrade_tb_rel_ofsll_14_12_0_0_0.sql'.
- Copy 'upgrade_tb_rel_ofsll_14_10_0_0_x_to_14_12_0_0_0.sql' file available under `ofslldb_p8.zip\data_fix` folder to `\ofslldb.zip\infrastructure\tables` folder.

- Create one sql folder each under `ofslldb.zip\seed_data\us\combination_data` and `ofslldb.zip\seed_data\us\system_data` to move the respective sql files in the next step.

- Copy the file 'upgrade_seed_data_combination_14_10_0_0_x_to_14_12_0_0_0.sql' available under `ofslldb_p8.zip\data_fix` folder to `\ofslldb.zip\seed_data\us\combination_data\sql\`.

- Copy the file 'upgrade_seed_data_system_14_10_0_0_x_to_14_12_0_0_0.sql' available under `ofslldb_p8.zip\data_fix` folder to `\ofslldb.zip\seed_data\us\system_data\sql\`.

This topic consists of the following sections:

- Upgrade to 14.12.0.0.0
- Upgrade Application

1.1.1 Upgrade to 14.12.0.0.0

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 ofsll)
  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 OFSLL Product
      2.  Upgrade Installation      Upgrade existing installation of OFSLL 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 OFSLL Product
    X 2.  Upgrade Installation      Upgrade existing installation of OFSLL 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/ofsll): []
```

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 Le
asing
objects? (This is usually ofsllprd): ofsllrel

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...
crt_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 ha
    s required privilages 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/ofsll_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.

1.1.2 Upgrade Application

Perform the below steps to upgrade OFSLL Application:

1. Copy the latest `OfsllCommonCSF.jar` from `OfsllQueueApp.ear/lib/` available in the staging area to `$DOMAIN_HOME/lib`

2. Undeploy the existing Application.

3. Deploy the Application (Refer to chapter 5 in the **Application Installation Guide** for detailson redeployment of applications).

4. Similarly undeploy and deploy the web services (For more information on deploying Restful WebService, refer to section - **Deploy RESTful WebServices** in 'WebServicesInstallation Guide').

1.2 Updating the Reports

Refer OAS Installation Guide for details on updating the reports.