

Oracle Imaging and Process Manager Implementation
Manual

Oracle FLEXCUBE Investor Servicing

Release 12.0.3.0.0

[April] [2014]



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1. Introduction

1.1 Scope of the Document

This Document details FCIS integration with Oracle Imaging and Process Manager.

1.2 Abbreviations and Acronyms

FCIS	Oracle FLEXCUBE Investor Servicing.
Oracle IPM	Oracle Imaging and Process Manager
SOA	Service Oriented Architecture

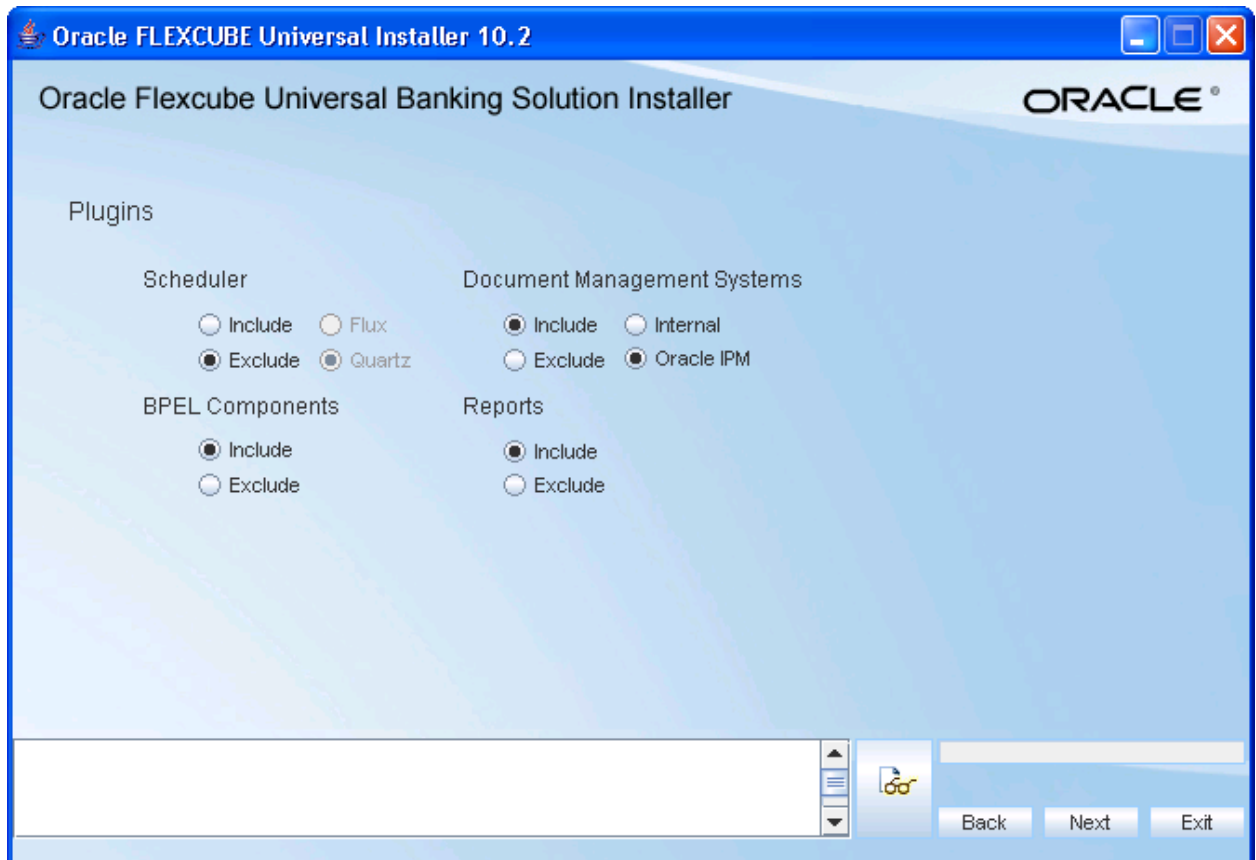
1.3 Requirements

Storing electronic documents and/or images of paper documents sent by FCIS Workflow in Oracle IPM.

2. EAR File Creation

Once the Oracle IPM installation is done, following steps needs to be followed for IPM. [Refer Ear file Creation Doc] in addition While Creation there should be a folder ADAPTERS inside the SOURCES folder copy the ADAPTERS folder from the location \\filblw-bpd-12\Vercon_IP-BPD-01\SOFT\FLEXCUBE_Kernel\FC_UBS_V.UM_10.2.0.0.0.0

1. While generating ear file using Installer need to select “Include” and “Oracle IPM” for “Document Management Systems”.



2. In the DMS Properties enter the ipaddress of the IPM server, NTLM User Name and password would be the user through which the IPM is been installed and IPM User Name and password would be the user which we created during IPM installation which has IPM server local machine admin rights, check the Permanent Delete and Document Classification should be 'FCIS'

Oracle FLEXCUBE Universal Installer 10.2

Oracle Flexcube Universal Banking Solution Installer

ORACLE®

Dms Properties

Oracle IPM Adapter Details

Endpoint Address	<input type="text" value="http://10.184.53.233/IBPMWeb/servic"/>	IPM User Name	<input type="text" value="ipmuser"/>
NTLM User Name	<input type="text" value="NaveenK"/>	IPM Password	<input type="password" value="*****"/>
NTLM Password	<input type="password" value="*****"/>	IPM License	<input type="text" value="FullSeat"/>
NTLM Domain	<input type="text" value="I-FLEX"/>	IPM Style	<input type="text" value="WSSConnect"/>
File Upload URI	<input type="text" value="http://10.184.53.233/IBPMWeb/OTInf"/>	IPM Viewer URL	<input type="text" value="http://ddhp0240/IBPMWeb/default.as"/>
<input checked="" type="checkbox"/> Permanent Delete		Document Classification	<input type="text" value="FCIS"/>

Back Next Exit

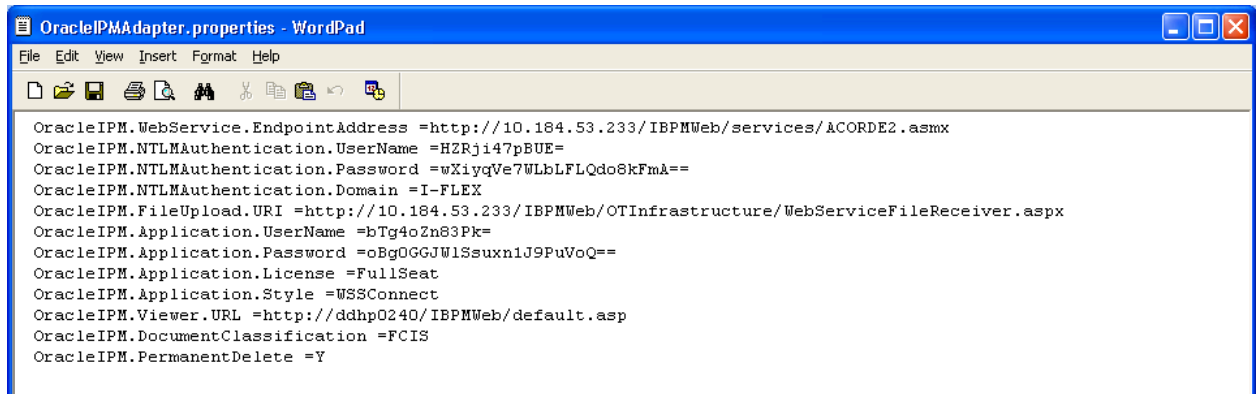
3. After the above steps fcubs.properties file will be created with the following entries for DMS.

DMS_ENABLED=Y

DMS_ADAPTER_TYPE =ORACLE_IPM_ADAPTER.

4. An OracleIPMAdapter.properties will be generated replace this file in the Oracle_IPM_Adapter.jar file

[Note: In Oracle_IPM_Adapter.jar file go to the location '\COMIFLEX\FCC\INTEGRATION\ORACLE\IPM\' we would find the OracleIPMAdapter.properties file]



```
OracleIPM.WebService.EndpointAddress =http://10.184.53.233/IBPMWeb/services/ACORDE2.asmx
OracleIPM.NTLMAuthentication.UserName =H2Rji47pBUE=
OracleIPM.NTLMAuthentication.Password =wXiyqVe7WLbLFLQdo8kFmA==
OracleIPM.NTLMAuthentication.Domain =I-FLEX
OracleIPM.FileUpload.URI =http://10.184.53.233/IBPMWeb/OTInfrastructure/WebServiceFileReceiver.aspx
OracleIPM.Application.UserName =bTg4oZn83Pk=
OracleIPM.Application.Password =oBg0GGJWlSsuxn1J9PuVoQ==
OracleIPM.Application.License =FullSeat
OracleIPM.Application.Style =WSSConnect
OracleIPM.Viewer.URL =http://ddhp0240/IBPMWeb/default.asp
OracleIPM.DocumentClassification =FCIS
OracleIPM.PermanentDelete =Y
```

5. In ear file navigate to FCJNeoWeb/WEB-INF/lib and copy "Oracle_IPM_Adapter.jar".

3. SOA Suite Application Server

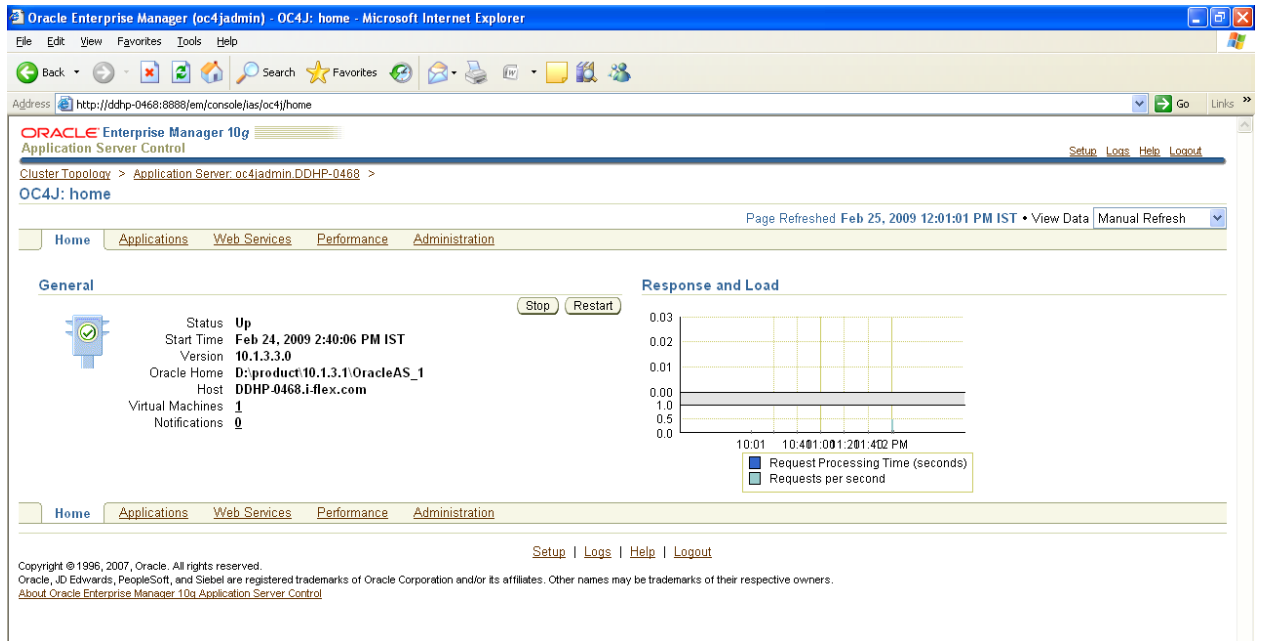
1. Log into application server, click on home.

The screenshot shows the Oracle Enterprise Manager 10g Cluster Topology page in a Microsoft Internet Explorer browser. The page title is "Oracle Enterprise Manager (oc4jadmin) - Cluster Topology - Microsoft Internet Explorer". The address bar shows "http://ddhp-0468:8888/em/console/ias/cluster/topology". The page header includes "ORACLE Enterprise Manager 10g" and "Application Server Control". The main content area is titled "Cluster Topology" and shows an "Overview" section with statistics: Hosts 1, Application Servers 1, OC4J Instances 1, and HTTP Server Instances 0. Below this is a "Members" section with a table of application servers. The table has columns: Select, Name, Status, Type, Category, Host, CPU (%), and Memory (MB). The first row is "All Application Servers" (expanded). The second row is "oc4jadmin.DDHP-0468" (selected, circled in red) with status "Up", type "Application Server", category "Application Server", host "DDHP-0468", CPU 0.58%, and memory 322.39 MB. The third row is "home (JVM: 1)" with status "Up", type "OC4J", category "OC4J", host "DDHP-0468", CPU 0.58%, and memory 322.39 MB. Below the table is a "Groups" section with a table of groups. The table has columns: Select, Name, OC4J Instance, Status, and Application Server. The first row is "default_group" (selected) with OC4J Instance "home", status "Up", and Application Server "oc4jadmin.DDHP-0468". Below the groups section is an "Administration" section with links: Cluster MBean Browser, Routing ID Configuration, Java SSO Configuration, Topology Network Configuration, and Runtime Ports. The page footer includes copyright information and a "Local intranet" status bar.

Select	Name	Status	Type	Category	Host	CPU (%)	Memory (MB)
<input type="checkbox"/>	▼ All Application Servers						
<input checked="" type="checkbox"/>	oc4jadmin.DDHP-0468	Up	Application Server	Application Server	DDHP-0468	0.58	322.39
<input type="checkbox"/>	home (JVM: 1)	Up	OC4J	OC4J	DDHP-0468	0.58	322.39

Select	Name	OC4J Instance	Status	Application Server
<input checked="" type="radio"/>	default_group	home	Up	oc4jadmin.DDHP-0468

2. Now click on administration tab.



3. Now select the Shared Libraries

Oracle Enterprise Manager 10g
Application Server Control

Cluster Topology > Application Server: oc4jadmin.DDHP-0468 >
OC4J: home

Page Refreshed Feb 25, 2009 12:01:12 PM IST

Home Applications Web Services Performance Administration

Expand All | Collapse All

Task Name	Go to Task	Description
Administration Tasks		
Properties		
EJB Compiler Settings		Configure the EJB Compiler.
J2EE Websites		Manage the J2EE websites in this OC4J instance.
JSP Properties		Set JSP container properties.
Logger Configuration		Set log levels for all Loggers.
Thread Pool Configuration		Configure the thread pools of this OC4J instance.
Shared Libraries		Manage the shared libraries of this OC4J instance.
Server Properties		Configure server properties for this OC4J instance.
Services		
JDBC Resources		Create/delete/view data sources and connection pools.
Enterprise Messaging Service		
JMS Destinations		Create/delete/edit JMS destinations.

4. Click on Create

Oracle Enterprise Manager 10g
Application Server Control

Cluster Topology > Application Server: oc4jadmin.DDHP-0468 > OC4J: home >

Shared Libraries

A shared library is used to share a set of code sources across applications. You define an application's dependency on a shared library when deploying the application. This page allows you to manage the shared libraries in this OC4J instance.

Create

Shared Library	Version	Archives	Shared Library Imports	Applications Importing Library	Shared Libraries Importing Library	System Shared Library	Delete
adf.generic.domain	10.1.3.1	17	15	1	0		
adf.oracle.domain	10.1.3.1	16	15	16	7		
apache.commons	10.1.3	7	0	0	4		
apache.commons.logging	1.0.4	1	0	0	7	<input checked="" type="checkbox"/>	
apache.jdom	10.1.3	2	1	0	3		
apache.junit	10.1.3	2	0	0	2		

5. Give the name as: axis, version: 1.4 and then click on next

Oracle Enterprise Manager 10g
Application Server Control

Cluster Topology > Application Server: oc4jadmin.DDHP-0468 > OC4J: home >

Create Shared Library: Attributes

Attributes Add Archives Import Shared Libraries

Shared Library Name:

Shared Library Version:

Cancel Step 1 of 3 Next

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[About Oracle Enterprise Manager 10g Application Server Control](#)

6. Now add the jar files and click ok.

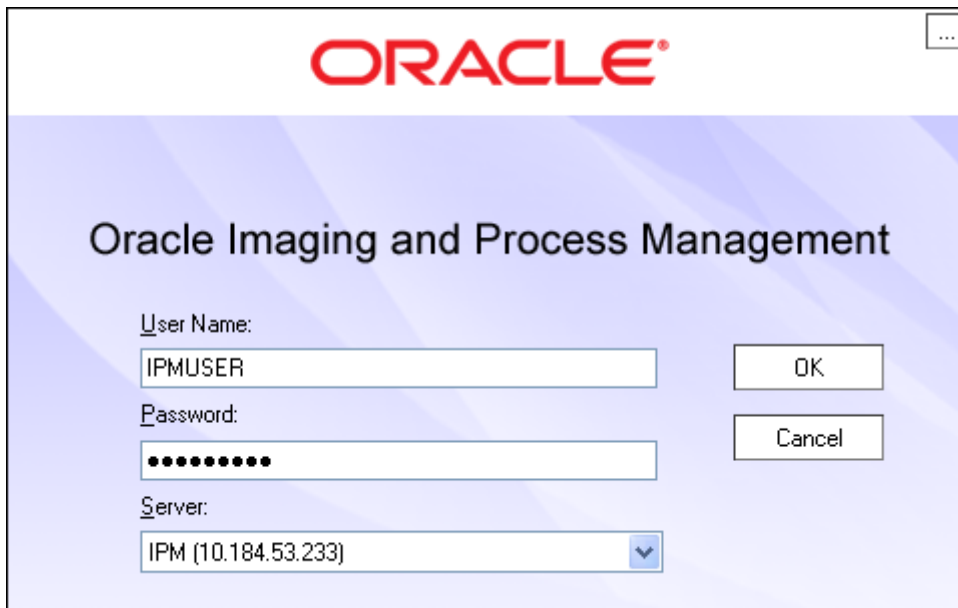
- axis.jar
- commons-codec-1.3.jar
- commons-discovery-0.2.jar
- commons-httpclient-3.0-rc4.jar
- commons-logging-api.jar
- wsdl4js-1.5.1.jar

7. After doing the above steps, restart the OC4J

8. While deploying the EAR file. select axis library in configure class loading. [Refer SOA Document.doc].

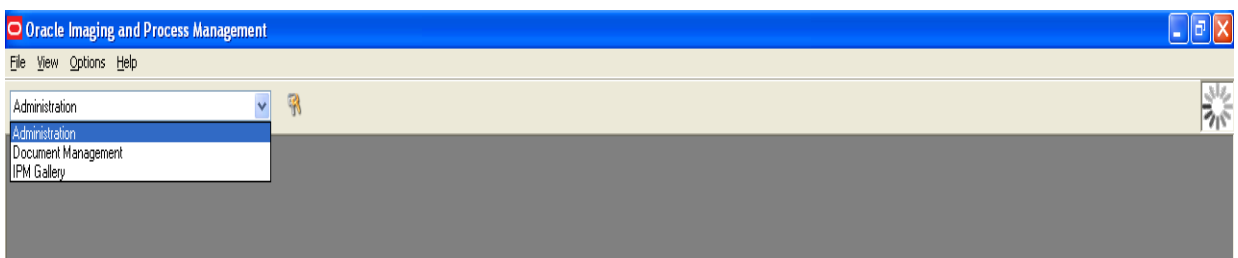
4. IPM Gallery Settings

1. Log in as the administrator for Oracle I/PM and type the Password. The Administrator must be a member of the IBPM Administrator group for a gallery to be available.

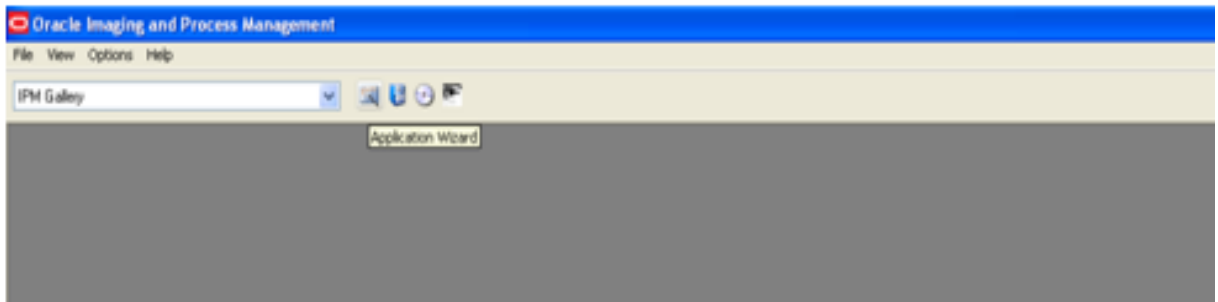


The image shows a login dialog box for Oracle Imaging and Process Management. At the top, the Oracle logo is displayed in red. Below it, the title "Oracle Imaging and Process Management" is centered. The dialog contains three input fields: "User Name:" with the text "IPMUSER", "Password:" with masked characters (dots), and "Server:" with a dropdown menu showing "IPM (10.184.53.233)". To the right of the input fields are two buttons: "OK" and "Cancel".

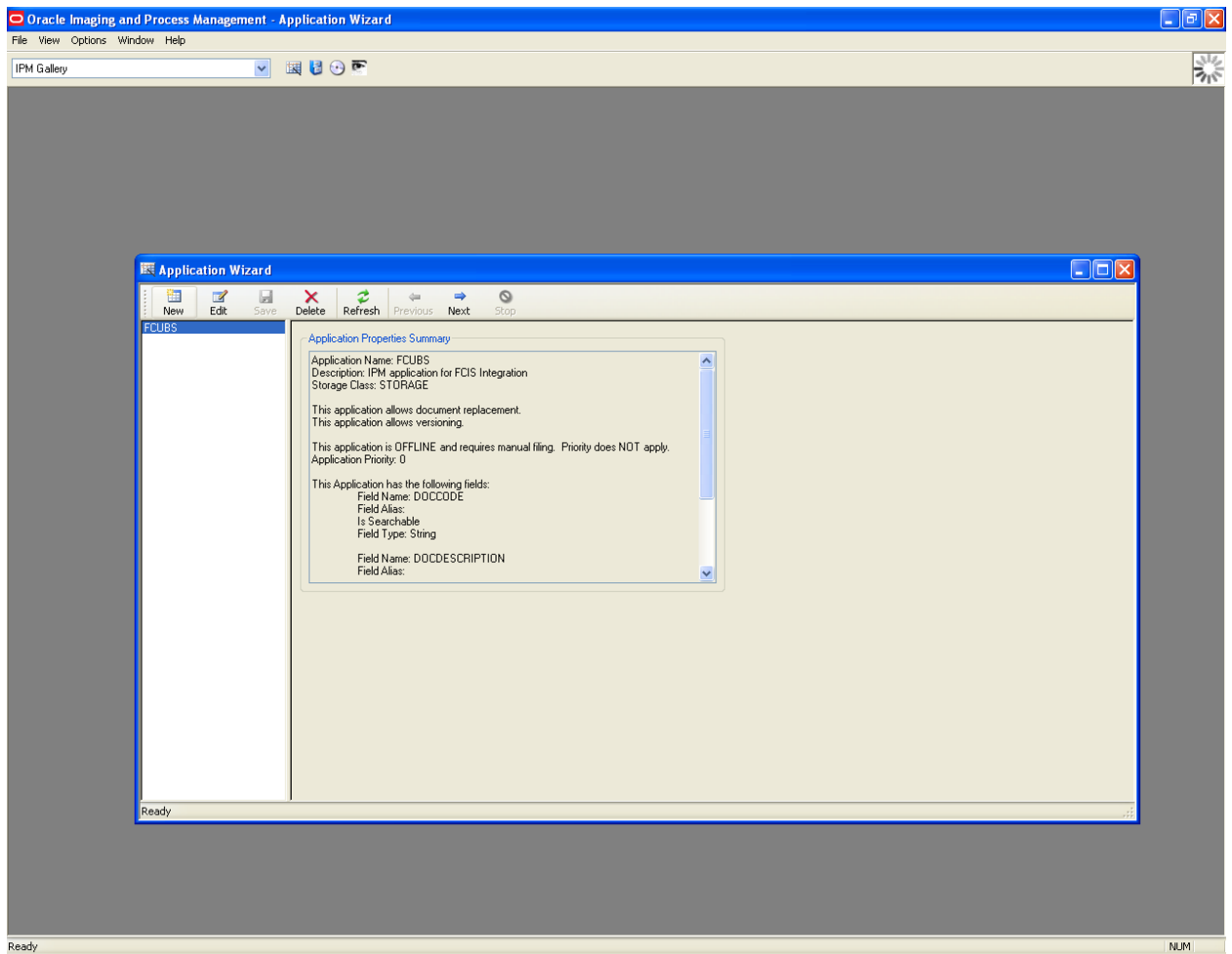
2. Select the gallery which was created during IPM Installation . [Refer IPM Installation Document Section Oracle I/PM Windows Client Gallery and Tools Assignment]



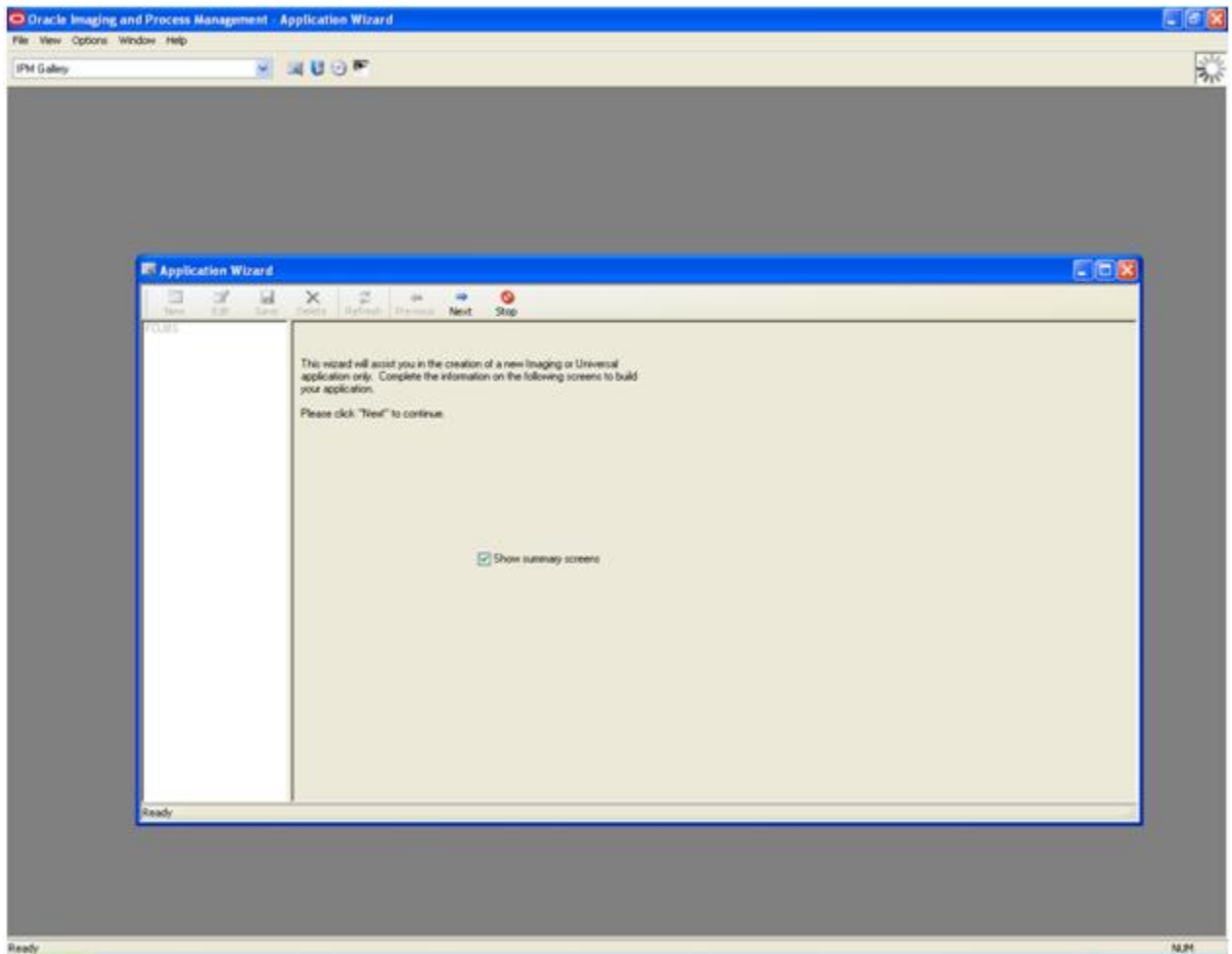
3. Click on the Application wizard button in the Toolbar.



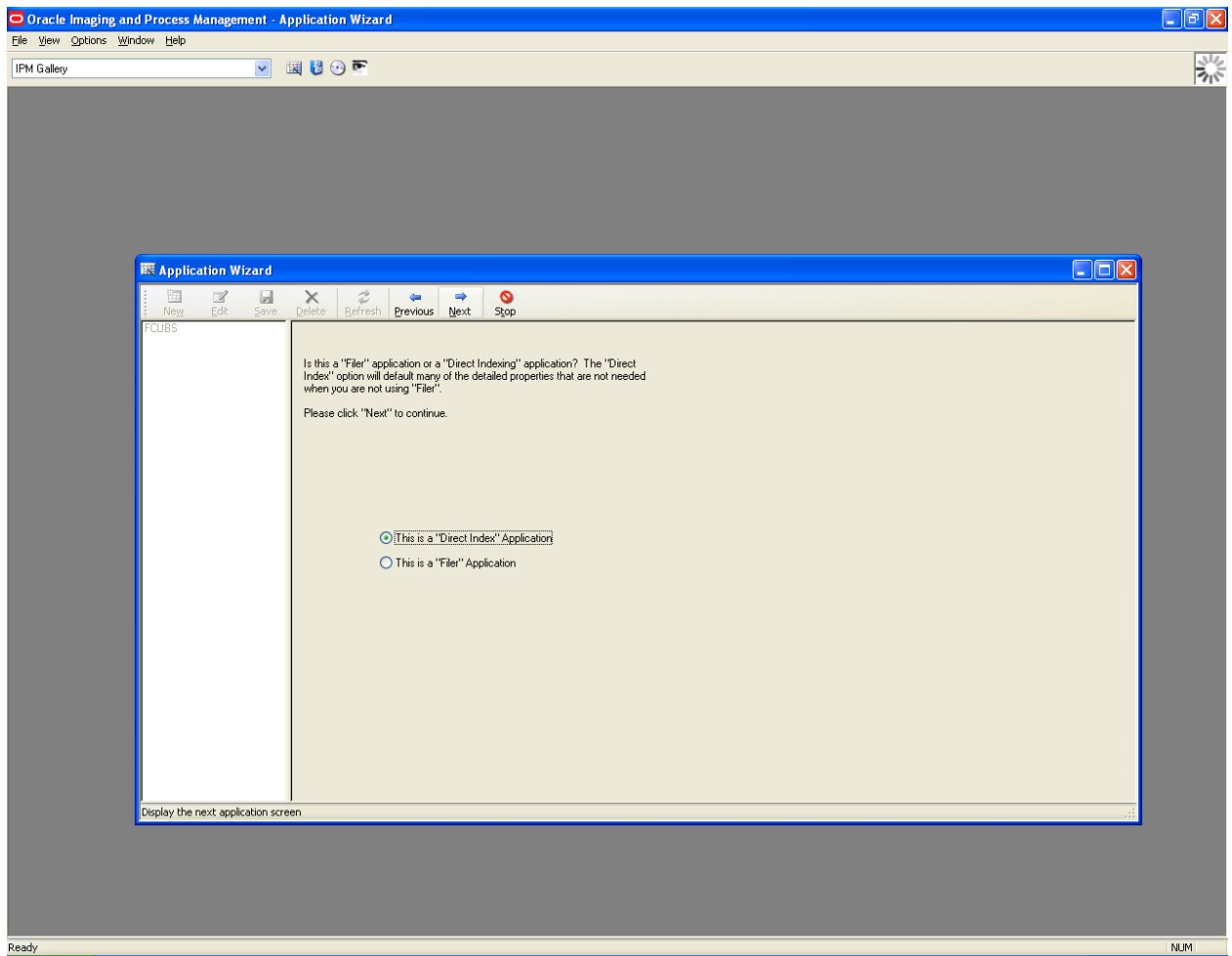
4. Click on New.



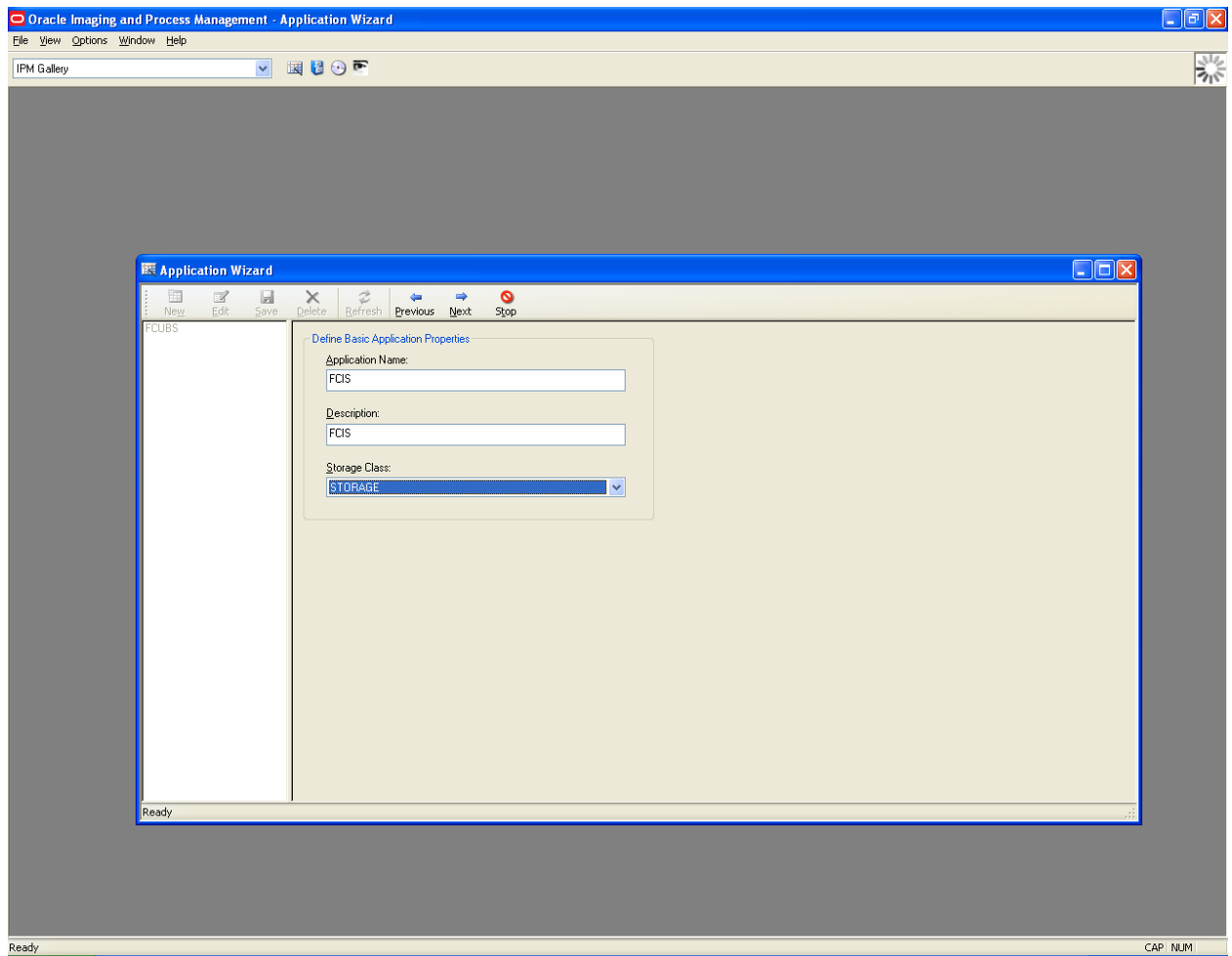
5. Check the show summary screens. Click on Next



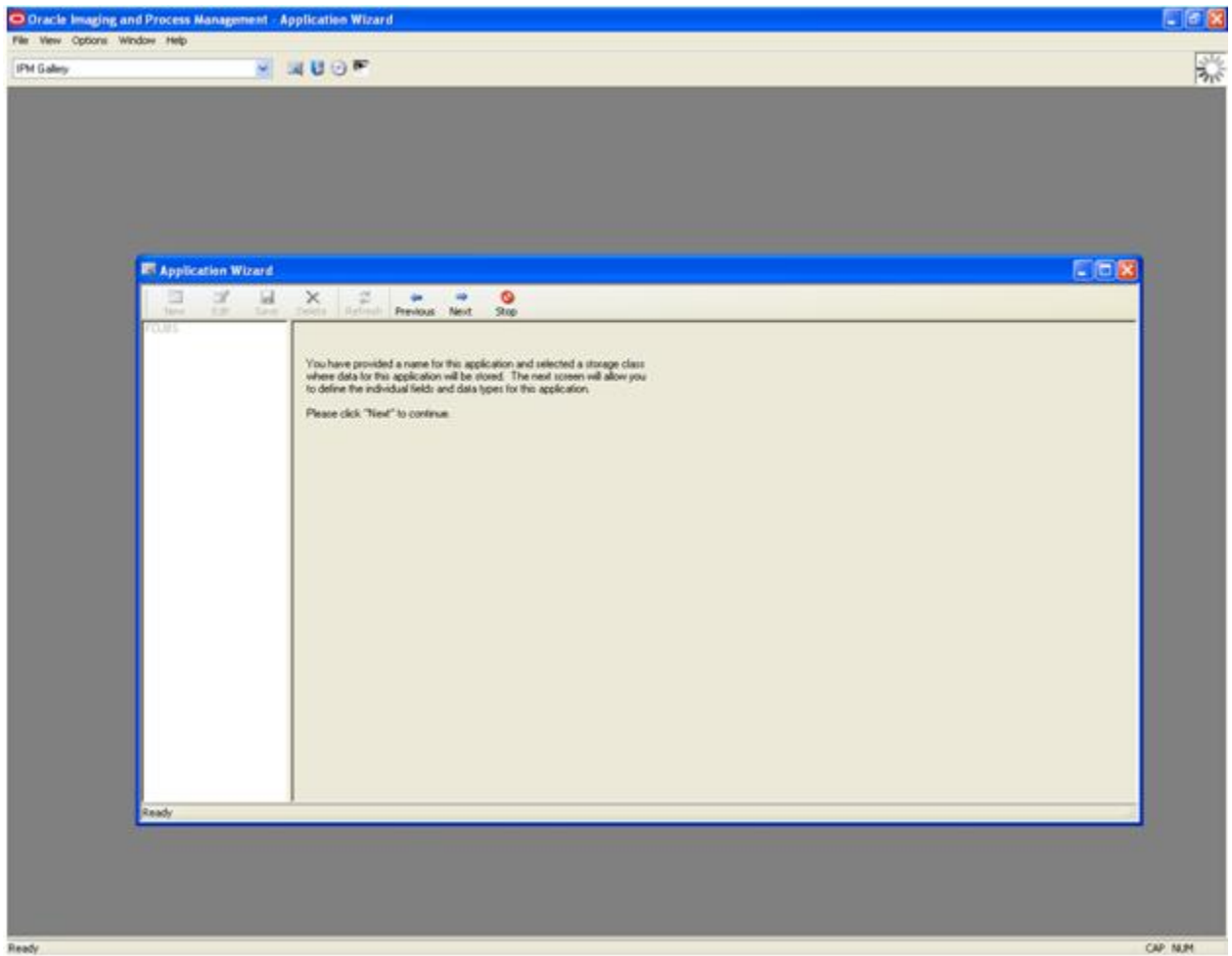
6. Select 'This is a "Direct Index" Application'. Then click on next.



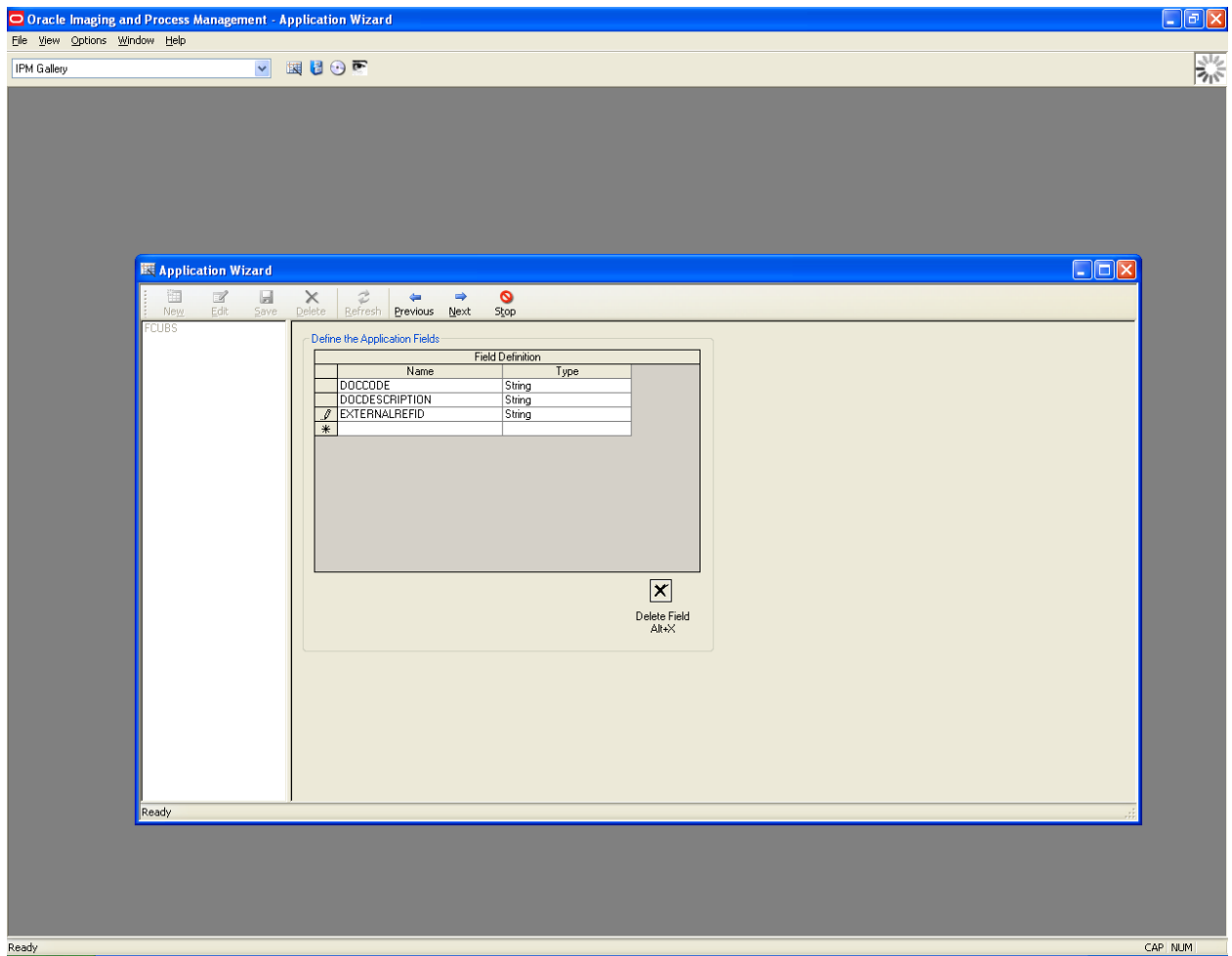
7. Give the application name as 'FCIS'. [Note: It should be same as we mentioned in the OracleIPM.DocumentClassification in the OracleIPMAdapter.properties file] then click on next.



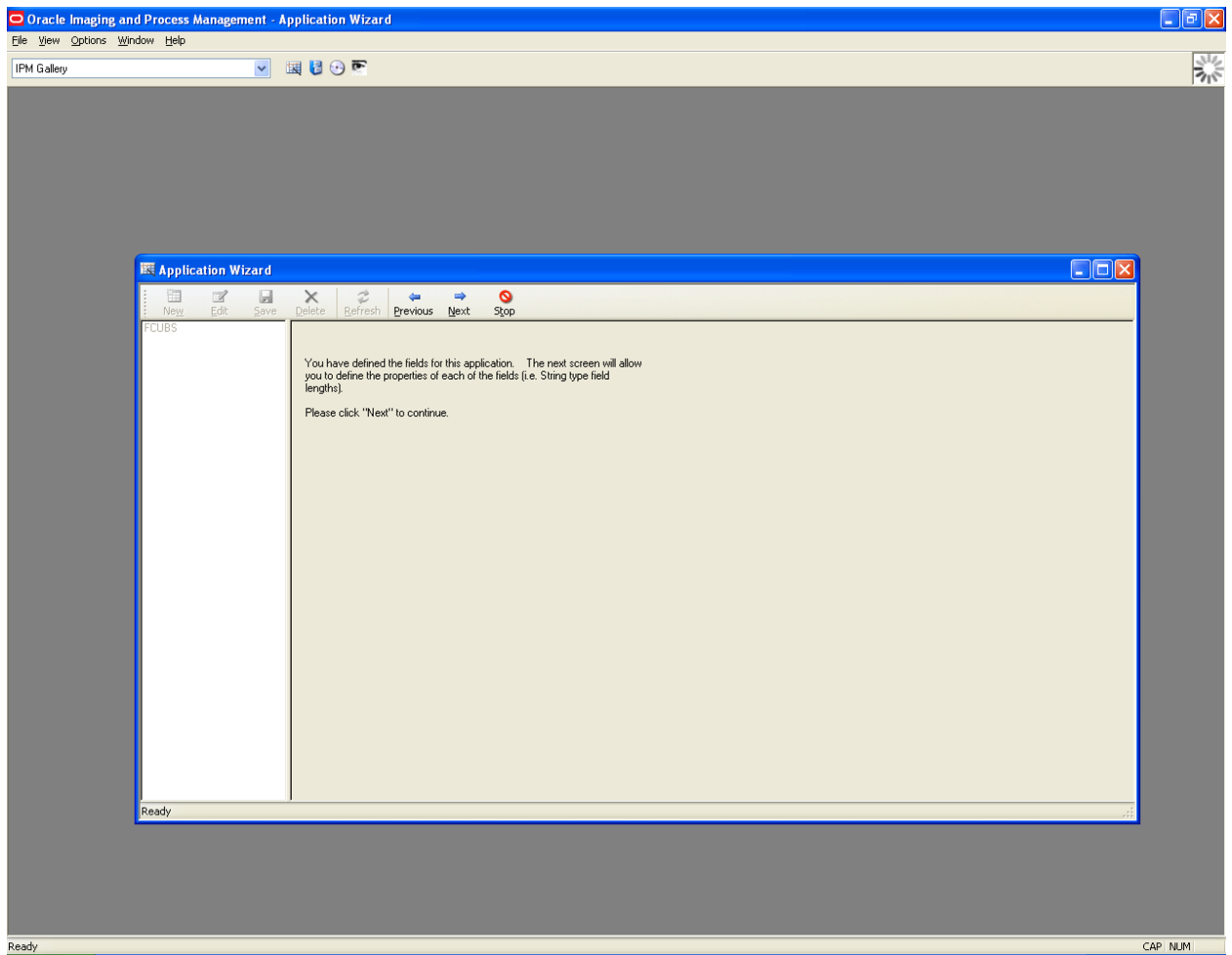
8. Just click next.



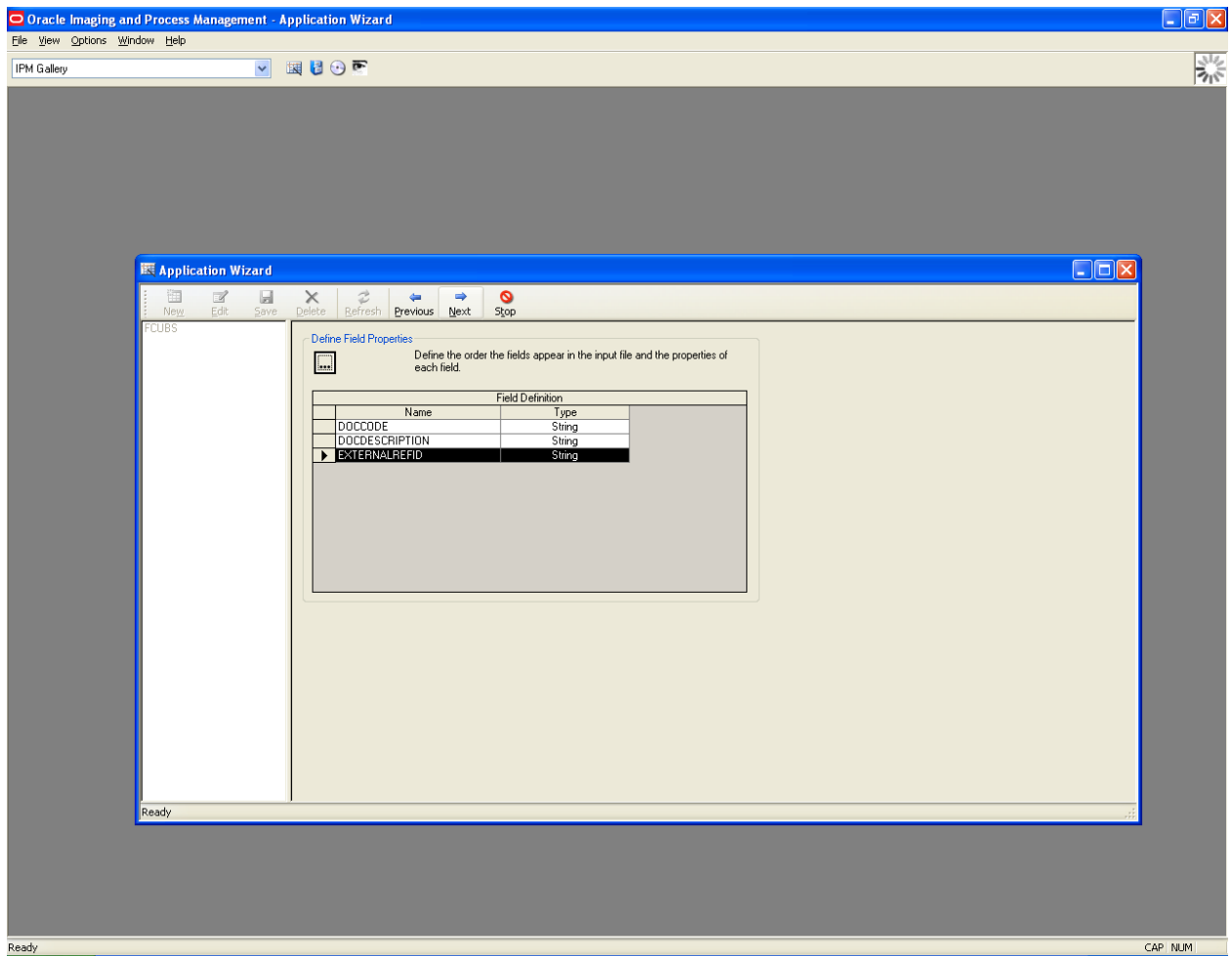
9. Enter DOCCODE, DOCDESCRIPTION, EXTERNALREFID. Then click on next.



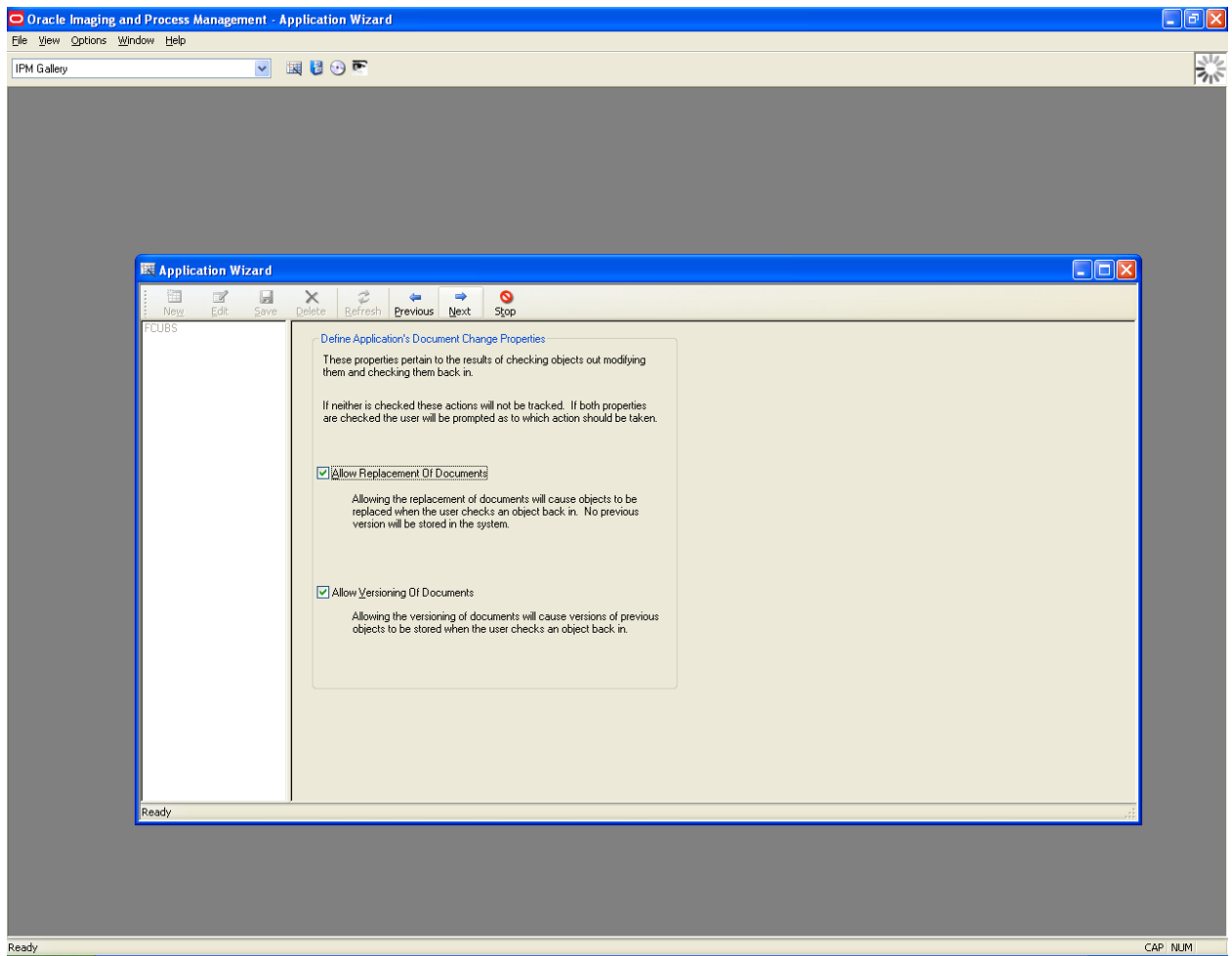
10. Click on next to continue.



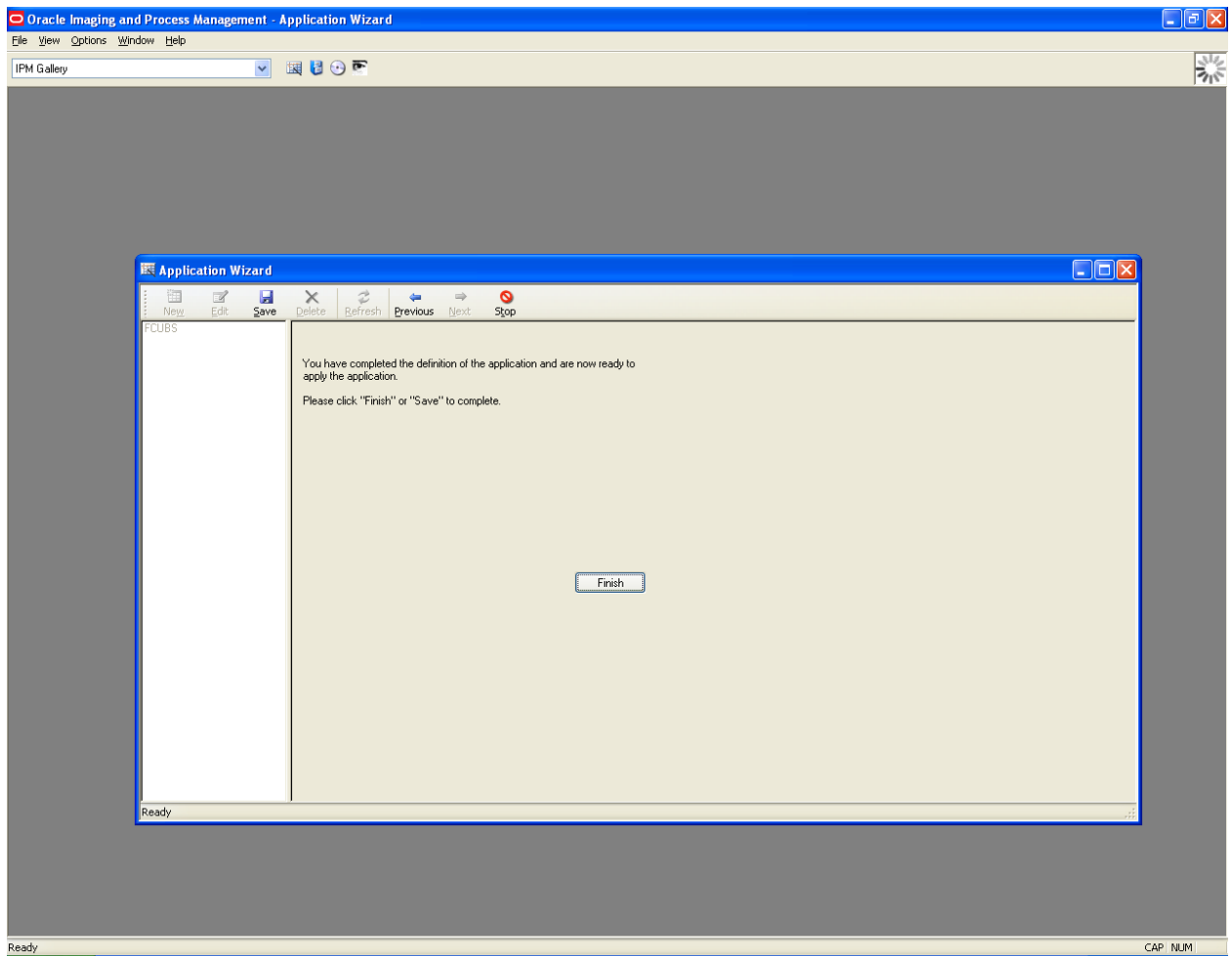
11. Click on next.



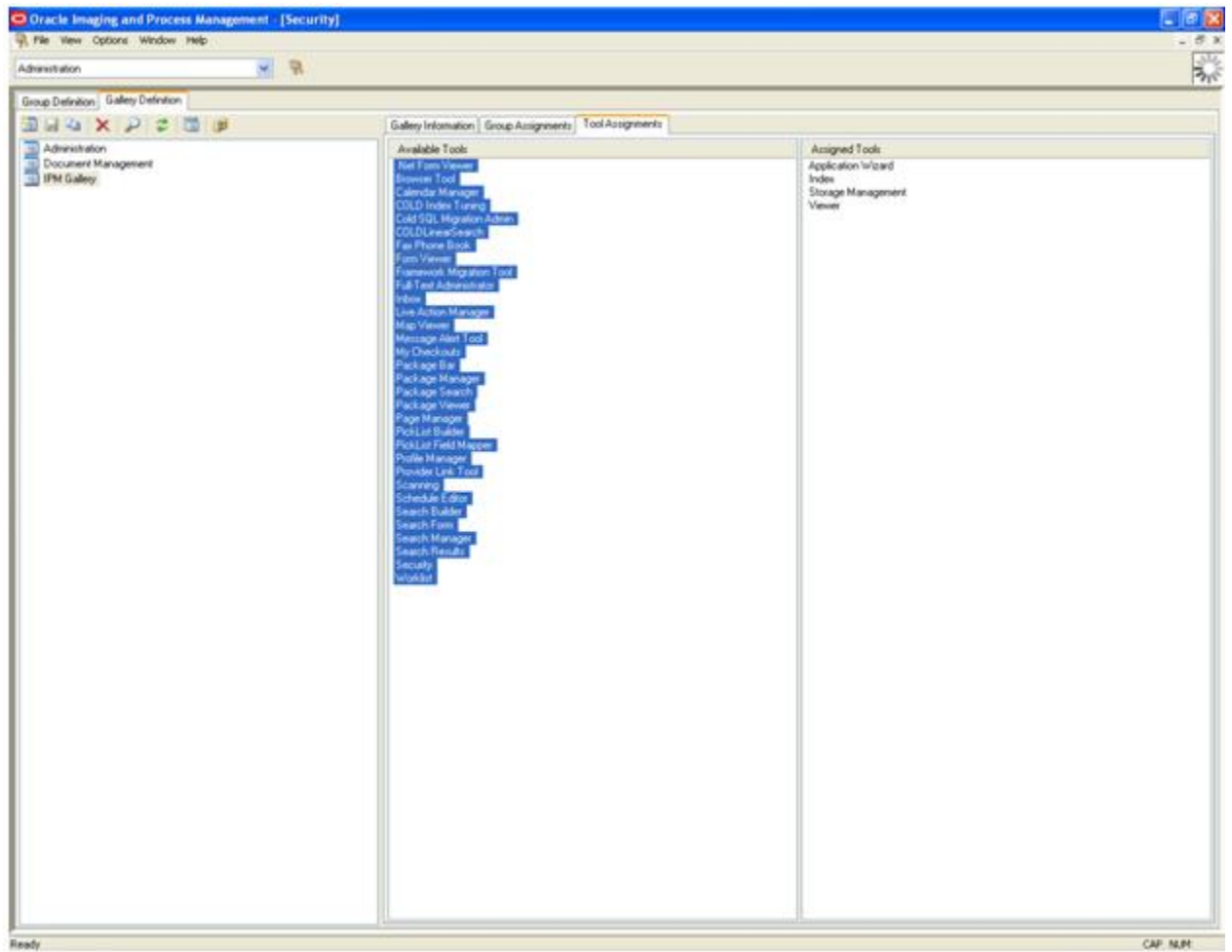
12. Check both the 'Allow Replacement Of Document' and 'Allow Versioning Of Documents' and then click next.

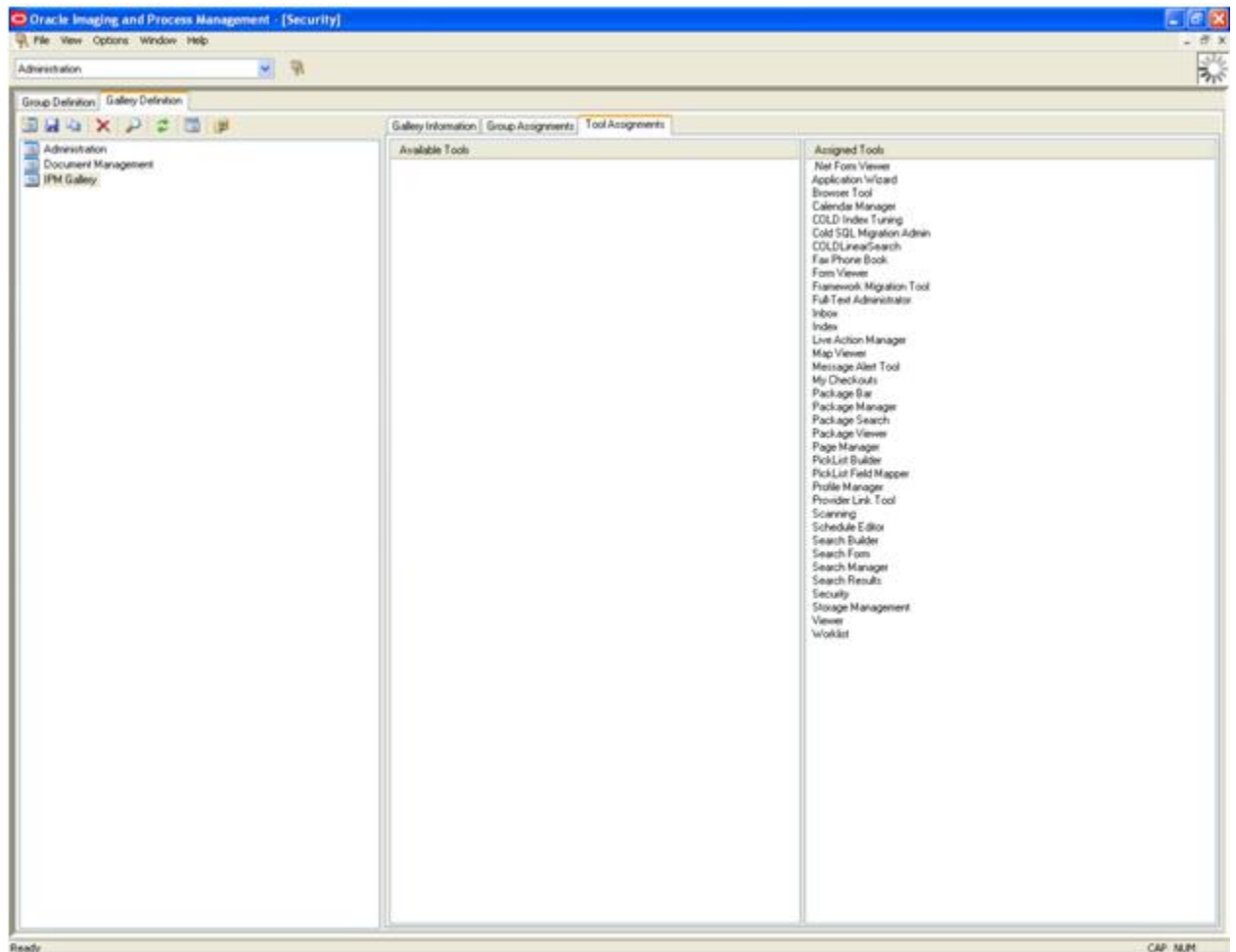


13. Now click on Finish.



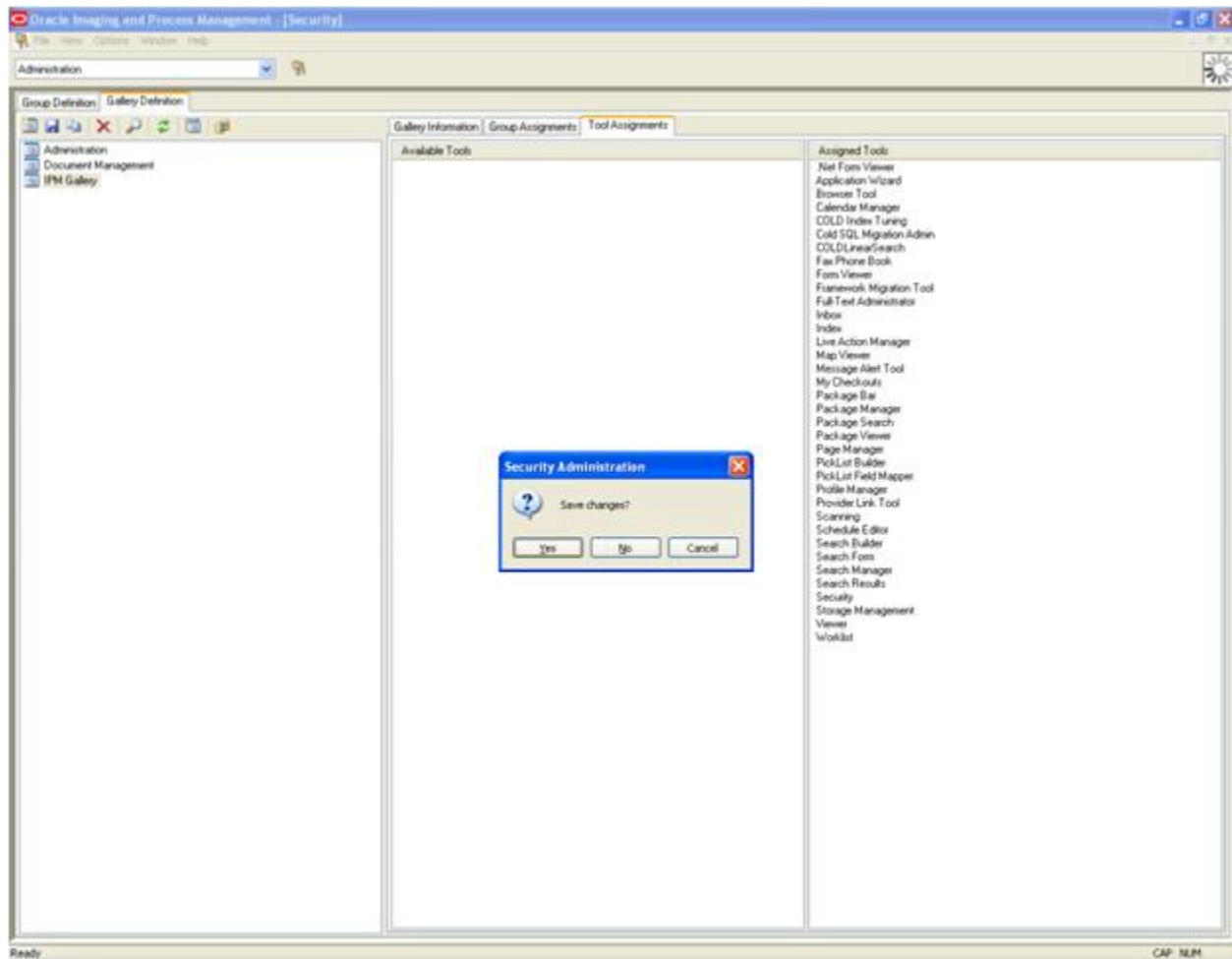
14. Go to the Administration Select the Group Definition Tab.
15. Select the Gallery which is being created.
16. Click on the Tool Assignments tab.
17. Assign all the tools to the Gallery by selecting them and double-clicking or dragging them from *Available Tools* to *Assigned Tools*.



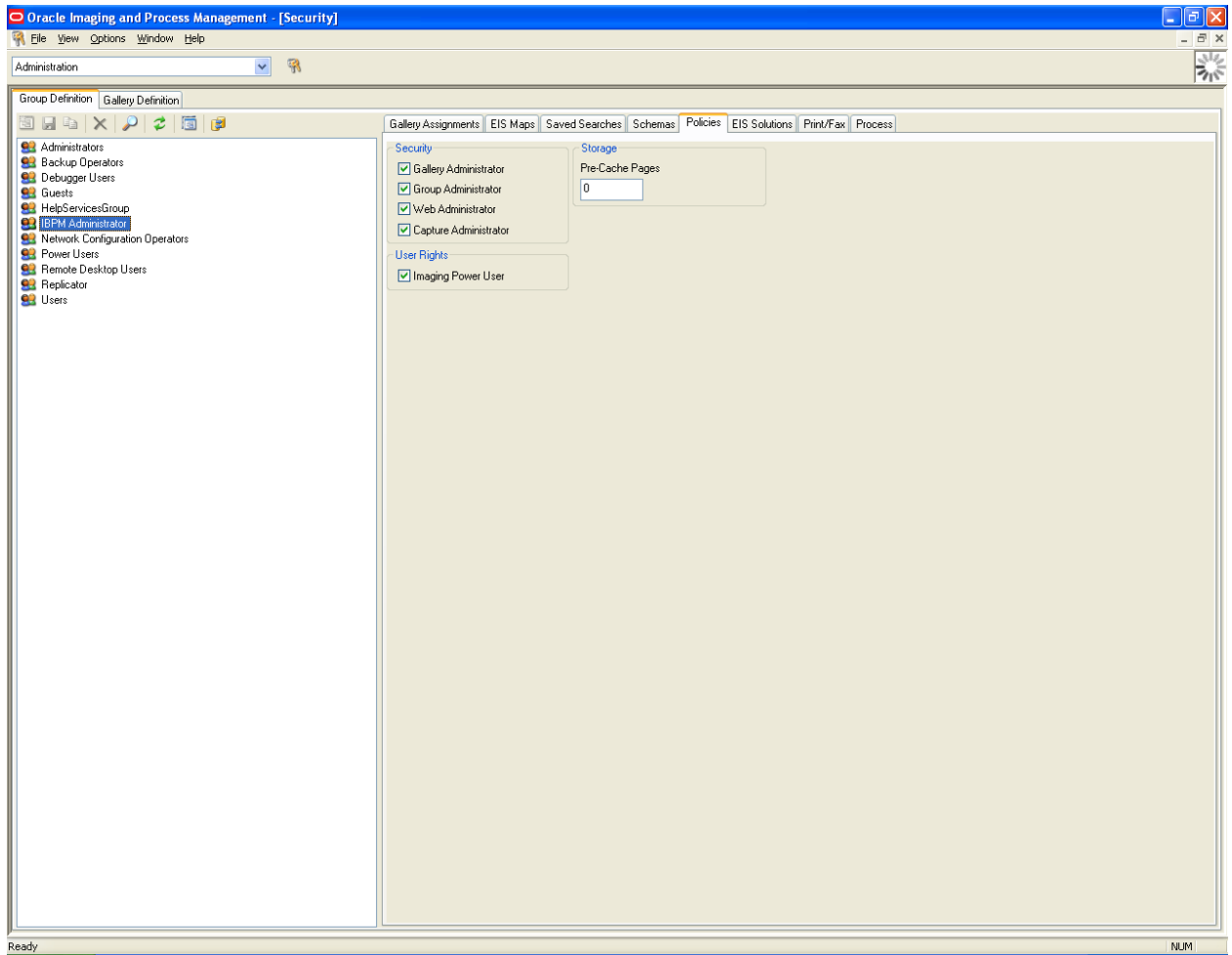


18. Select the Group Definitions tab. The Security Administration dialog appears.

19. Click yes to save the assignments.



20. Now click on Group Definition Tab
21. Select the IBPM Administrator
22. Select the policies tab.
23. Check all the options in the security and User Rights

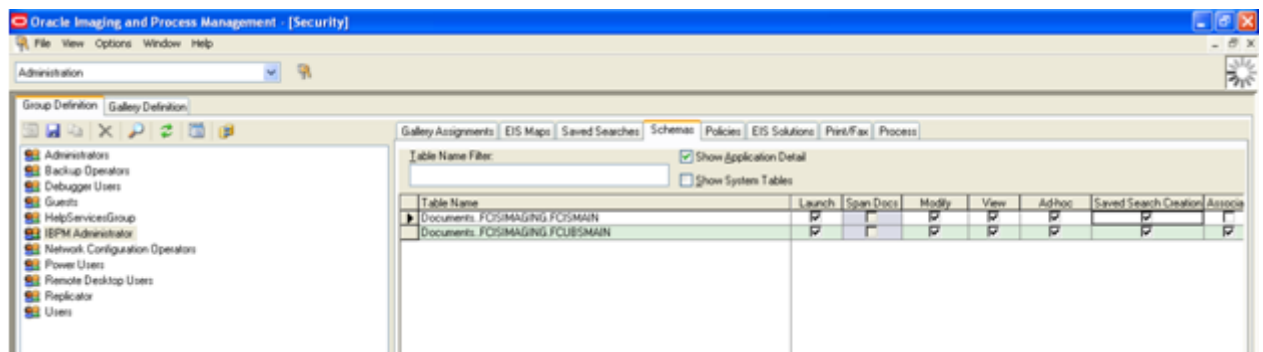
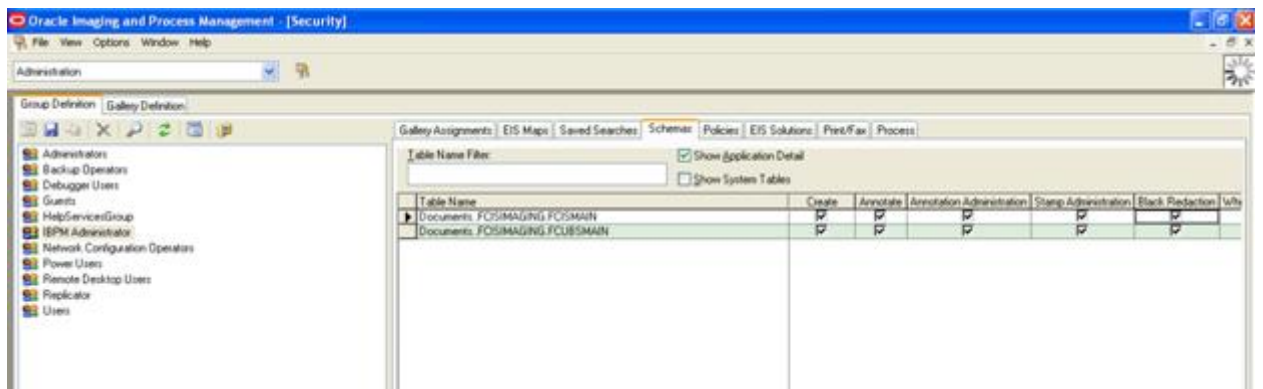
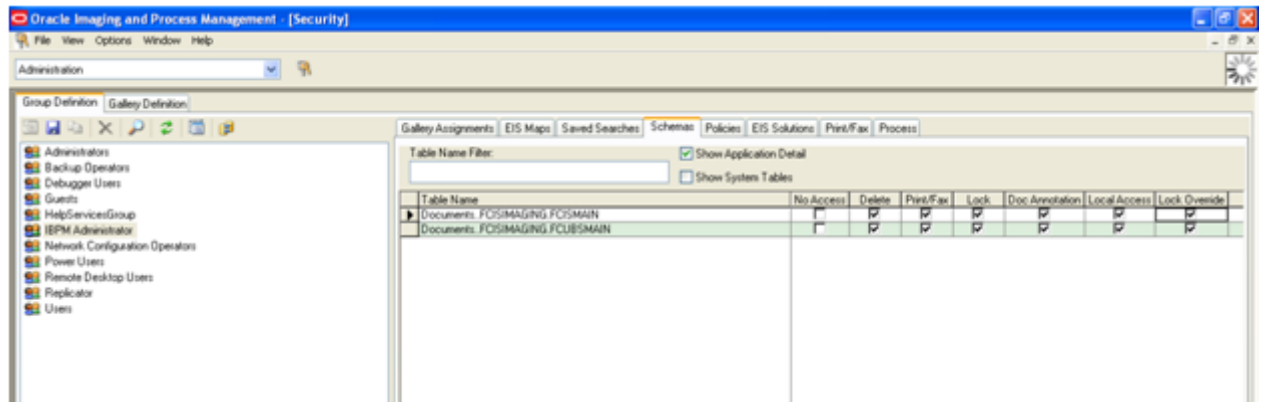


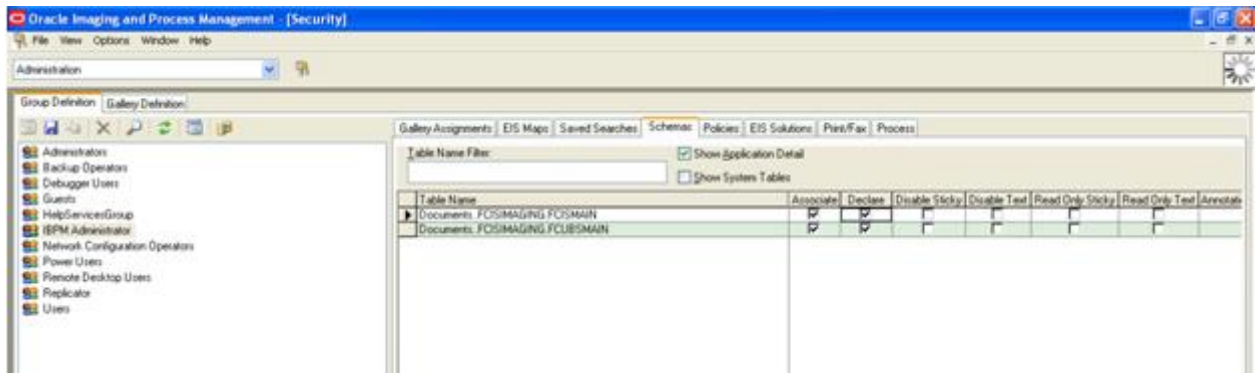
24. Now click on the Schemas tab

25. Check the option for the application which u have created earlier

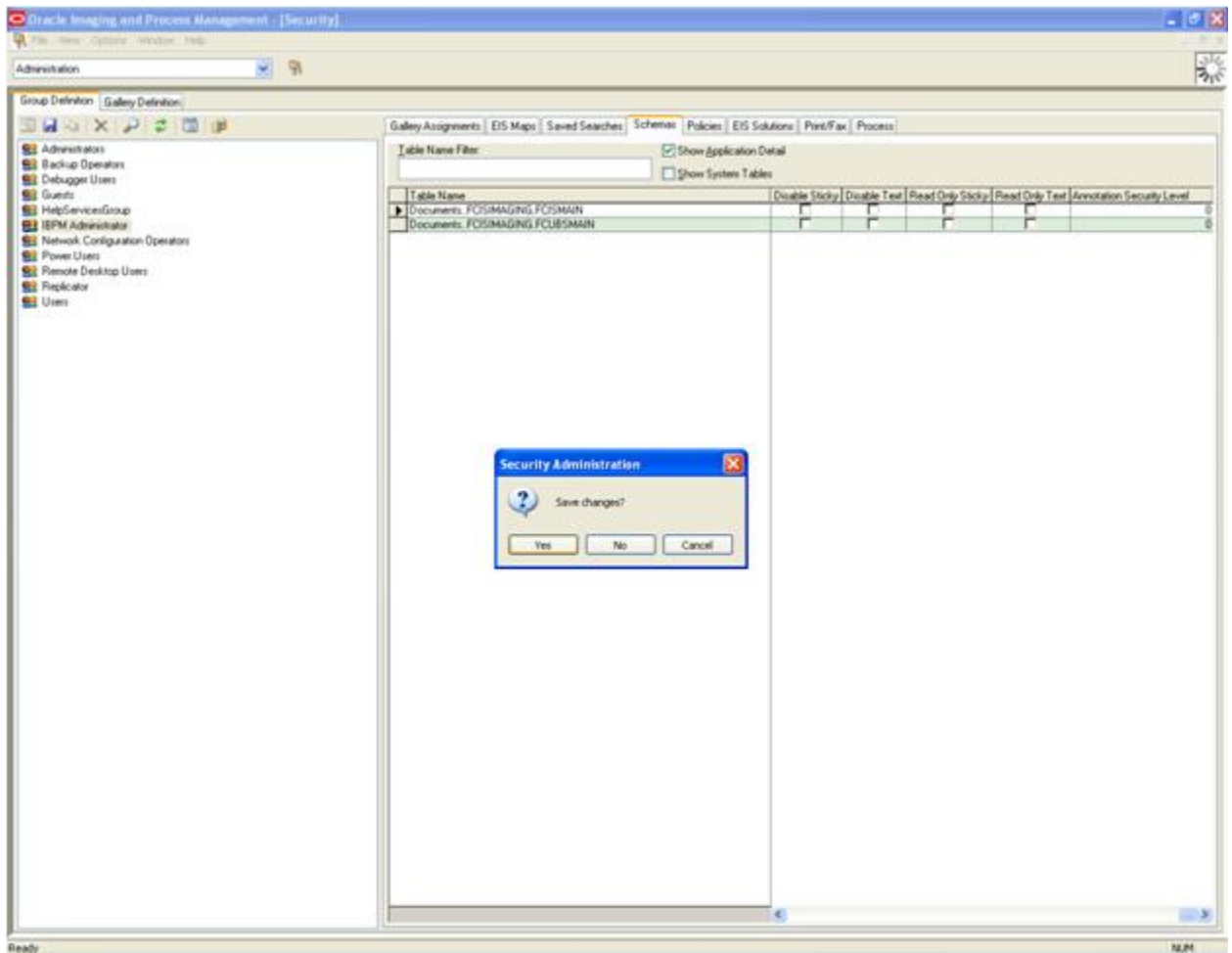
[Note Check the options:

Delete, Print/Fax, Lock, Doc Annotation, Local Access, Lock Override, Create, Annotate, Annotation Administration, Stamp Administration, Black Redaction, Launch, Modify, View, Ad-hoc, Saved Search Creation, Associate, Declare]





26. After checking all the option which is mentioned in the note Click on Save.

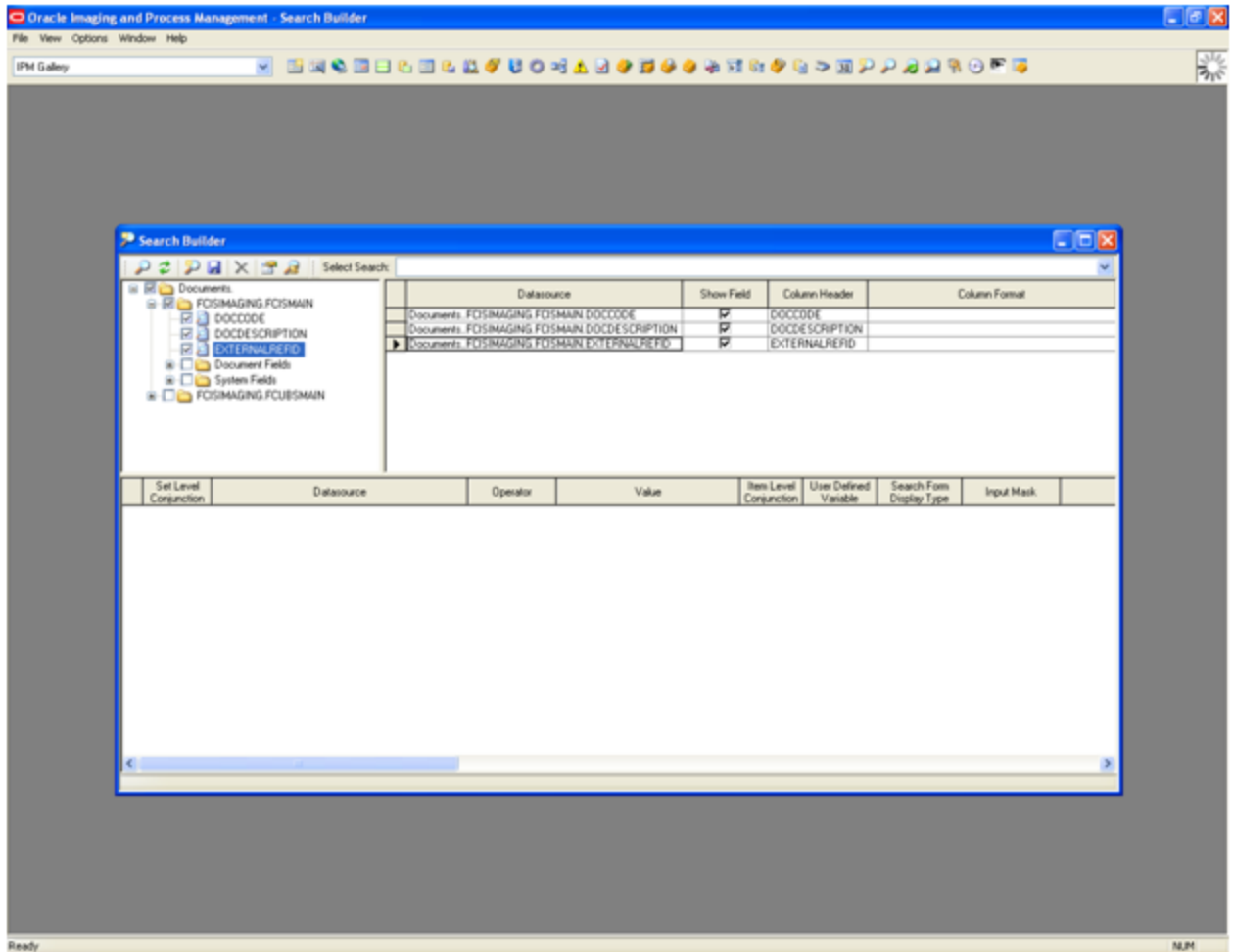


27. After this step log out and login

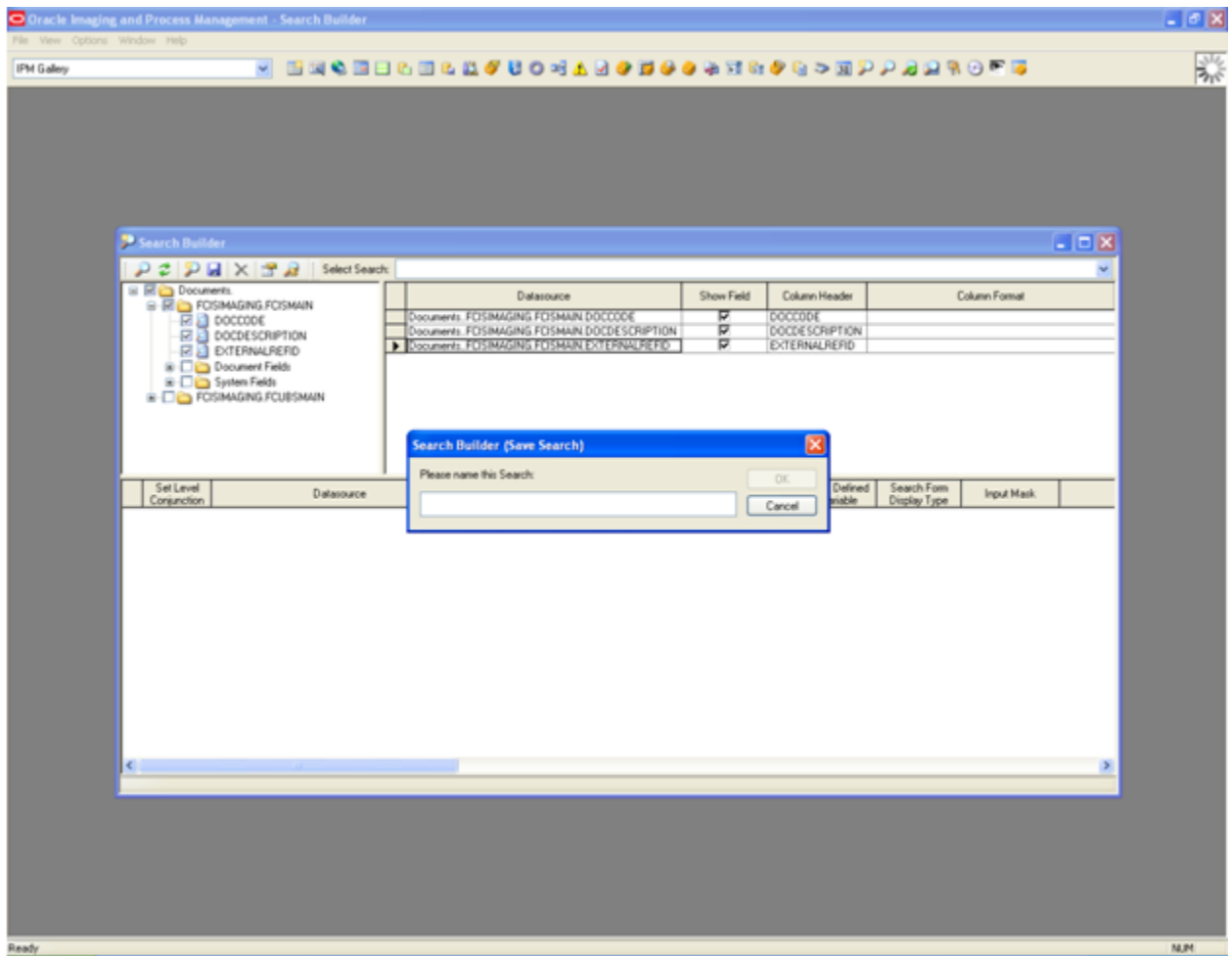
28. Select your desired gallery as I select 'IPM GALLERY'

29. Click on Search Builder.

30. Check DOCCODE, DOCDESCRIPTION, EXTERNALREFID

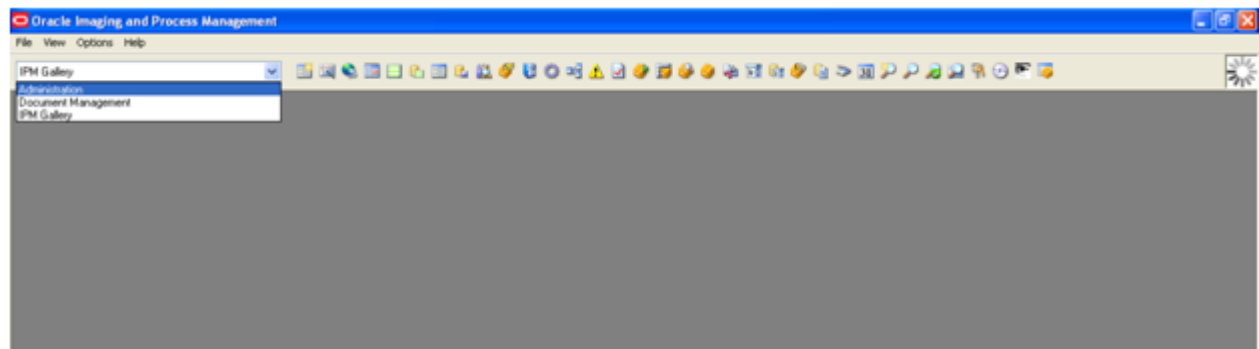


31. Click on Save



32. ENTER THE SEARCH NAME: Give the application name FCIS → which is appended with search so it is FCISSEARCH

33. Now select the Administrator



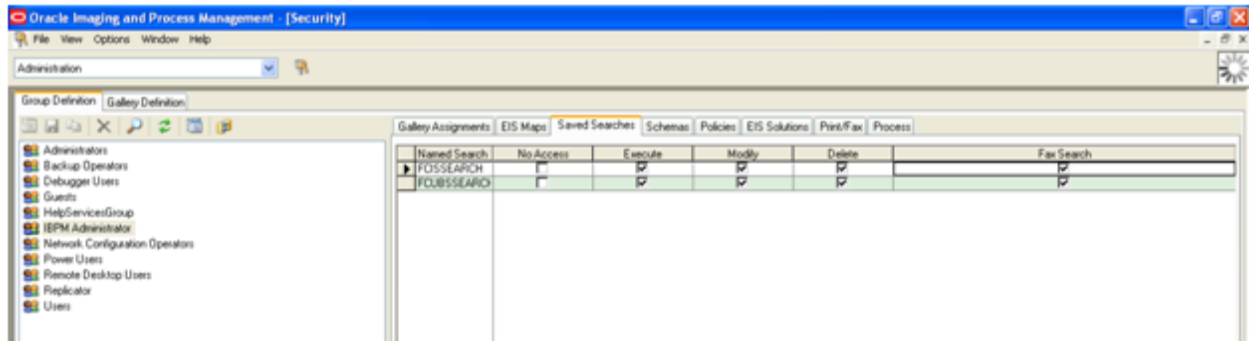
34. Click on the Security now click on the Group Definition Tab

35. Select the IBPM Administrators

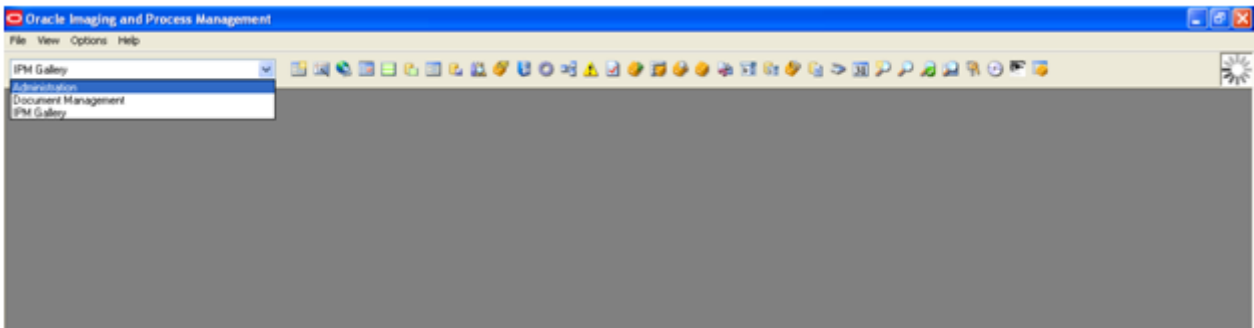
36. Now select the Saved Searches tab. We would find the Saved Search which we created before check the option.

[Note: Execute, Modify, Delete, Fax Search]

37. Then click on Save.



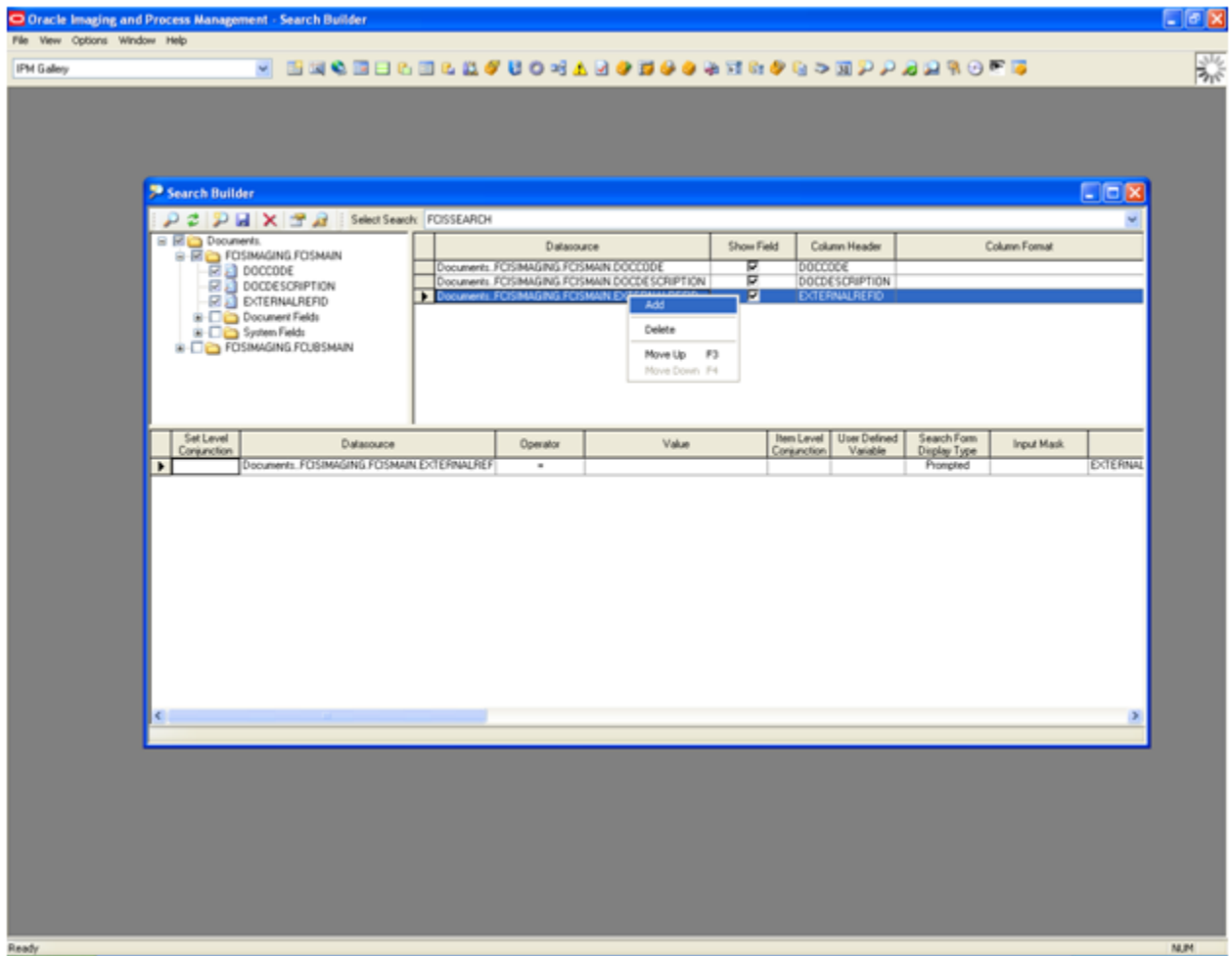
38. Now again select the gallery as I selected 'IPM Gallery'



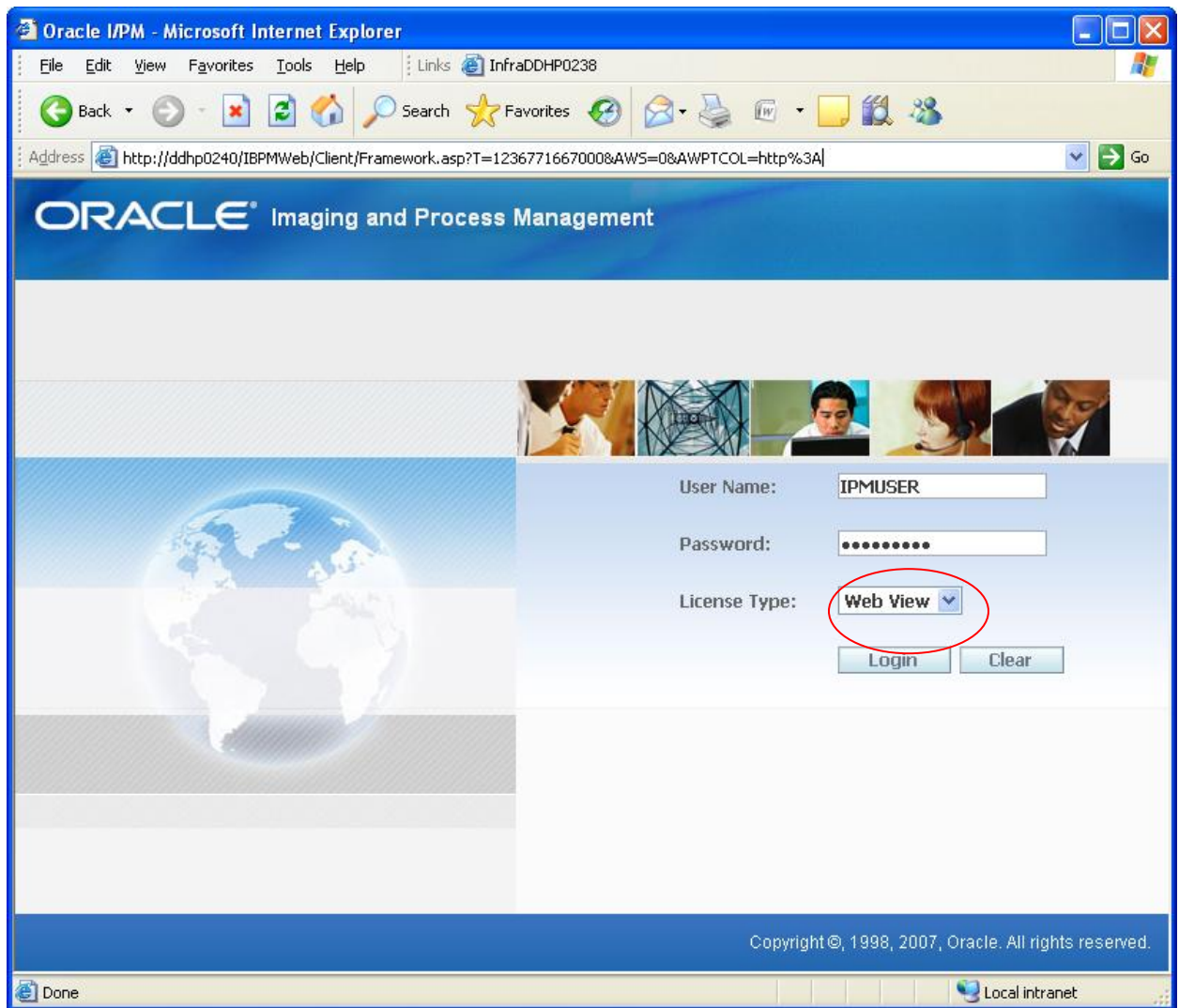
39. Click on the Search Builder in the Toolbar, we would find our Saved Search

40. On the EXTERNALREFID right click and add (as shown in the screenshot).

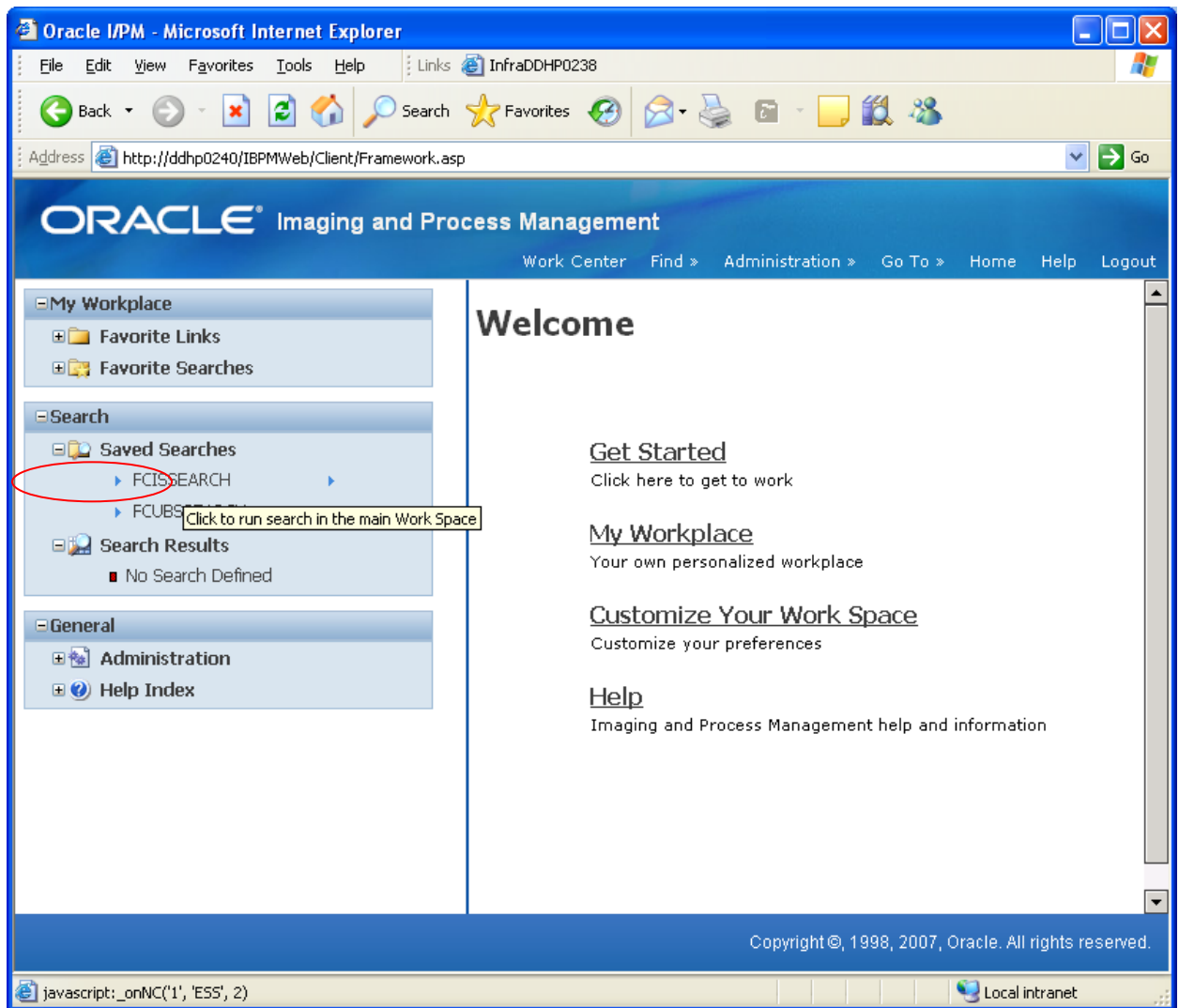
41. Click on Save.



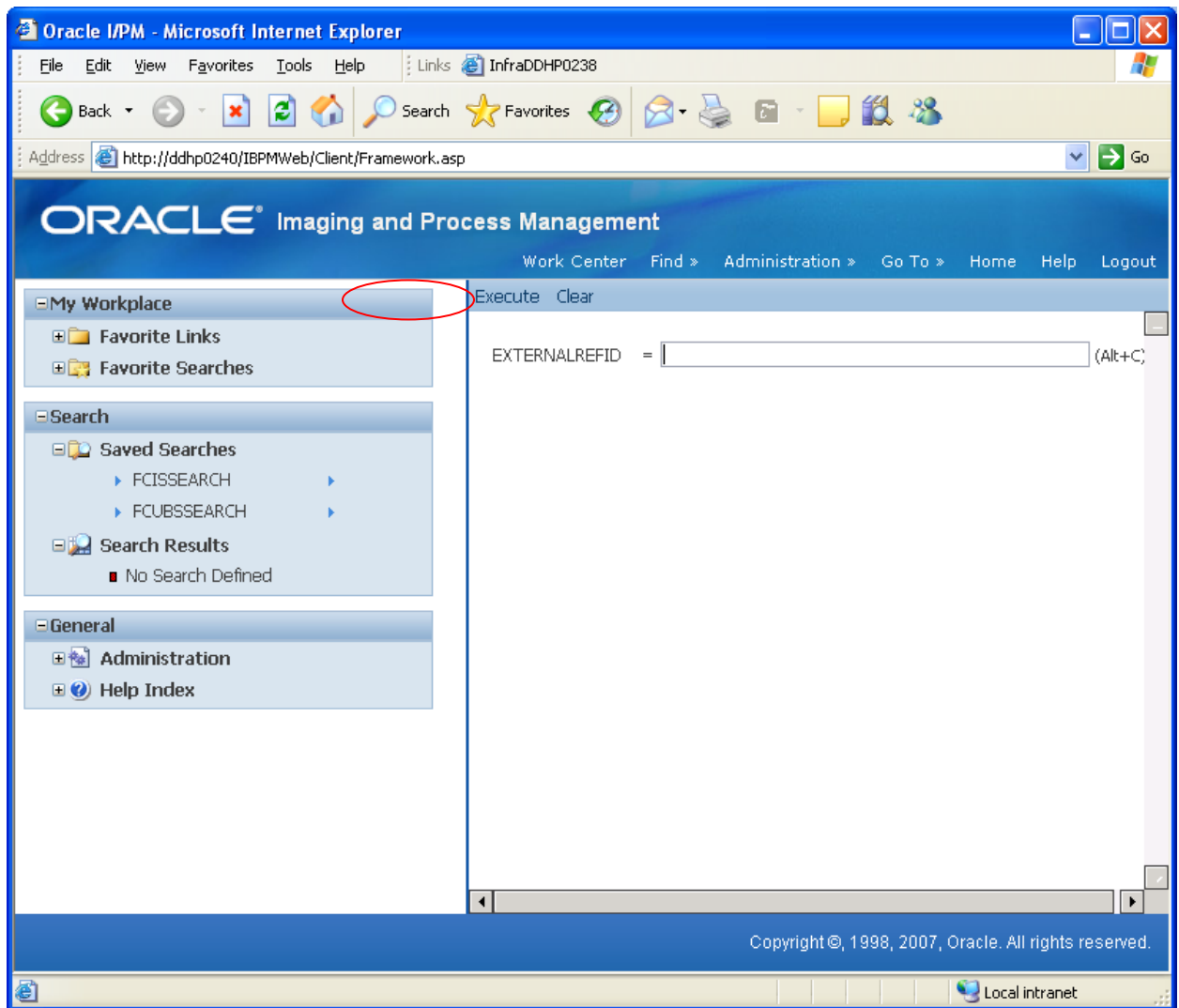
42. Log into the IPM server <http://ddhp0240/IBPMWeb>. [Note : ddhp0240 is the hostname of the IPM webserver]



43. Click on continue.



45. Enter the EXTERNALREFID which is the Document Id which is got generated when we upload the document, click on Execute.



46. Click on the number

Oracle I/PM - Microsoft Internet Explorer

File Edit View Favorites Tools Help Links InfraDDHP0238

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address http://ddhp0240/IBPMWeb/Client/Framework.asp Go

ORACLE® Imaging and Process Management

Work Center Find » Administration » Go To » Home Help Logout

Edit » View Thumbnail Refresh << Previous Next >> Send To »

View with: Oracle Viewer (Alt+O) ☒ **View in separate window (Alt+S)**

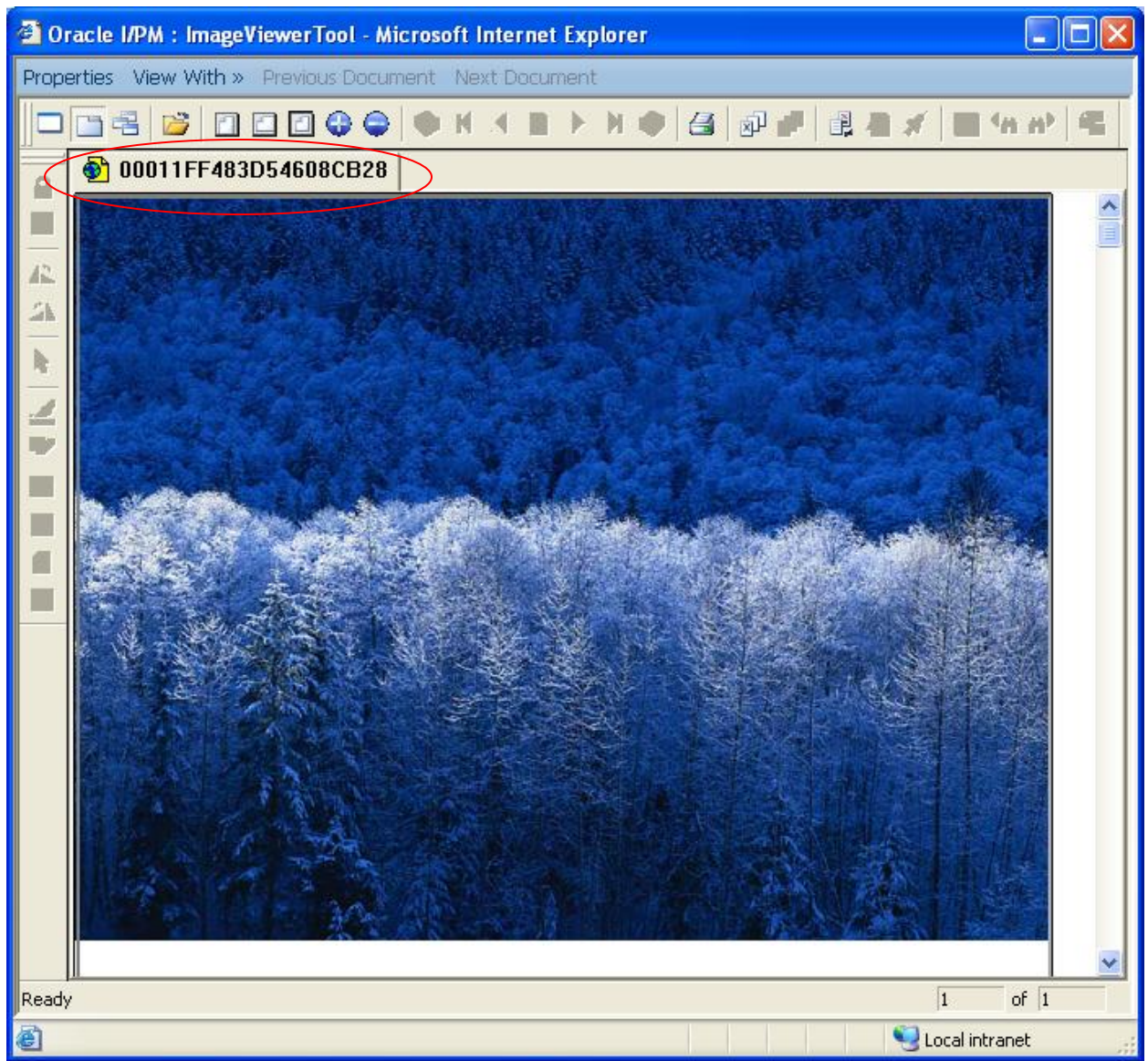
FCISSEARCH: Records 151 - 158 of 158

(Alt+B)	(Alt+N)	EXTERNALREFID	DOCCODE	DOCDESCRIPTION
151	<input type="checkbox"/>	00011FF46E5DC10EFC4	ID PROOF	Identity Proof
152	<input type="checkbox"/>	00011FF475D7C70CCEB6	RED DOC	Redemption Documents
153	<input type="checkbox"/>	00011FF476F573037C77	ID PROOF	Identity Proof
154	<input checked="" type="checkbox"/>	00011FF483D54608CB28	UH DOC	Unitholder Documents
155	<input type="checkbox"/>	00011FF488FD91022AE3	UH BRK	UH Broker Documents
156	<input type="checkbox"/>	00011FF4B7184301F7A0	ID PROOF	Identity Proof
157	<input type="checkbox"/>	00011FF4B757C3086D93	RED DOC	Redemption Documents
158	<input type="checkbox"/>	00011FF5024E4C05AEDF	SUB DOC	Subscription Documents

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Local intranet

47. We can see the document with the EXTERNALREFID is displayed.



5. Check list for IPM Enablement in FCIS

The following should be available in LOB Schema:

1. Proper static data should be available in GWTM_FCJ_FUNCTIONS.
2. Static data should be maintained in CSTM_DOCUMENTS for all the valid Document Id supported by the system
3. Static data should be maintained in CSTB_PROCESS_STAGE_DOCS for all the mandatory documents maintained in CSTM_DOCUMENTS
4. Static data Maintenance for the Document related operation codes should be available in GWTM_OPERATIONS_MASTER of SMS Schema.



Oracle Imaging and Process Manager
[April] [2014]
Version 12.0.3.0.0

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