



Design Pack Installation Guide

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Contents

1 What's New in This Release

2 Design Pack Installation

Software Requirements 7

Installing the Branch Teller Design Pack 7

 Contents of the Branch Teller Design Pack 7

 Other Model Files Included in the Release 8

 Installation and Upgrade Scenarios 8

 Installing as the Baseline Generic Branch Teller Design Pack 9

 Opening the Branch Teller Generic Design Model 10

Installing the Internet Banking Design Pack 10

 Contents of the Internet Banking Design Pack 10

 Other Model Files Included in the Release 11

 Installation and Upgrade Scenarios 11

 Installing as the Baseline Generic Internet Banking Design Pack 11

 Opening the Internet Banking Generic Design Model 12

1

What's New in This Release

What's New in Design Pack Installation Guide, Version 2005

Table 1 lists changes in this version of the documentation to support release 2005 of the software.

Table 1. What's New in Design Pack Installation Guide, Version 2005

Topic	Description
Software Requirements	Updated to reflect the correct version of the software, Rational Rose Enterprise Edition 2003.
Contents of the Branch Teller Design Pack	Updated to clarify the contents of the design pack.
Contents of the Internet Banking Design Pack	Updated to clarify the contents of the design pack.



2

Design Pack Installation

This chapter describes how to install the following design packs:

- Siebel Retail Finance Branch Teller Design Pack
- Siebel Retail Finance Internet Banking Design Pack

These design packs contain all the analysis documents, design model files, and generated design documents for Branch Teller and Internet Banking respectively.

This chapter contains the following topics:

- Software Requirements
- Installing the Branch Teller Design Pack
- Installing the Internet Banking Design Pack

NOTE: In this document, *vx.x* is used to refer to the current Siebel Retail Finance release.

Software Requirements

The design models for the current release were built using Rational Rose Enterprise Edition 2003.

CAUTION: Working with the models in another version of Rational Rose might cause errors to be displayed.

For changes to the design model you use the Siebel Retail Finance Design Tools, which are installed as an add-in to Rational Rose. For more information about the Design Tools, see the *Siebel Retail Finance Design Tools Guide*.

Installing the Branch Teller Design Pack

The following sections describe the contents of the design pack and how to install the design pack.

Contents of the Branch Teller Design Pack

The design pack is contained in `SiebelRetailFinanceBranchTellerDesignPackvx.x.zip` on the Siebel Retail Finance Branch Teller Extension Pack CD. When extracted, the design Pack contains the following elements for the Branch Teller module and Entitlements submodule:

- **A Rational Rose design model.** The model and workspace (.wsp) files are contained in the `\Rational Rose Model` folder and subfolders.
- **HTML design documents generated from the design model.** The design documents are contained in the `\RoseGeneratedDocs` folder and subfolders. The folder names are appended with

■ Installing the Branch Teller Design Pack

Rational Rose unique identifiers, which allows for objects within groups in the design model having the same name as objects in other groups.

- **Analysis documents.** These documents are contained in the `\FrontEnd` and `\RequirementsDefinition` folders and their subfolders, and include requirement definitions, GUI documents, and use case documents.
- **An XML file exported from the generic design model.** This file, `SiebelRetailFinanceBranchTellervx.x.xml`, is contained in the `\Model XML export` folder. It is used for importing Branch Teller processes into the Screen Orchestrator and FPI tools that are part of the Siebel Retail Finance Financial Transactions Workbench.
- **Templates for consistent analysis document layout.** These templates are contained in the `\Templates` folder. The templates are HTML (.dwt) files that you can use in an HTML editor such as Macromedia Dreamweaver for maintaining use case and GUI documents.

TIP: You can navigate through all the analysis and generated design documents for a component in the release by following the hyperlinks from the Requirements Definition document for that component. These component documents are contained in the folder `\RequirementsDefinition`.

TIP: To browse through the generated design documents for the design model as a whole, open the `\RoseGeneratedDocs\index.html` file, which contains hyperlinks to further index pages for generated documents for the different class types (financial objects, sessions, parameter objects, and so on) in the design model.

Other Model Files Included in the Release

The design model can contain some model files for entities, sessions, and other model classes that are not loaded by the Branch Teller or Entitlements workspaces, but by the workspaces for other Siebel Retail Finance modules. These model files are provided in every release to Siebel Retail Finance-licensed customers for reference purposes. The classes can be imported, if required, into an extended design model on the customer site.

If a customer wants to use a Siebel Retail Finance class that is not loaded by the Branch Teller or Entitlements workspace in its Branch Teller implementation, the customer should inform Siebel Retail Finance. Subject to agreement on capacity, scheduling, and any associated costs, the code for the class can be added to a future generic Branch Teller product release.

Installation and Upgrade Scenarios

There are two general scenarios for installing a design pack release:

- **Simple installation or replacement scenario.** The scenario where a customer does not have a previous release of the design pack, or where the previously installed design pack can simply be replaced with the current release, which then becomes the new generic design pack baseline for a project. The replacement scenario occurs where no design extension work has taken place on the installed generic design model.
- **Upgrade scenario.** The scenario where the model from a previous design pack was installed as the generic baseline for a project and was extended. Such extension work is lost if the domain-layer design files in the current release are copied in without a merge.

The following sections contain instructions for the simple installation or replacement scenario only. If you require information about how to upgrade to the current release from a design pack that was extended, contact Siebel Support at support@siebel.com.

Installing as the Baseline Generic Branch Teller Design Pack

This section describes how to install the current design pack release as the initial baseline design pack for a customer project, or to completely replace a previous release with the current release, if no extension work has taken place on the customer project.

After you extract the design pack .zip file to a temporary folder, you move the different release content areas to the required working folders or storage areas as used in the customer implementation. You can label and store the extracted files as the vx.x release in the customer's configuration management system for the project.

To install the analysis and generated design documents

- 1 Delete the analysis and generated design documents from any previous generic Branch Teller release that already exist in the customer's workspace.

NOTE: The files from a previous release can be labeled and stored in the customer's configuration management system for the project.
- 2 Extract the design pack .zip file to a temporary folder.
- 3 Extract the contents of the \FrontEnd, \RequirementsDefinition, \RoseGeneratedDocs and \Templates folders in the release .zip file to the project workspace as a whole unit. Make sure that you retain the relative position of analysis and generated design documents using the folder structures in the release .zip file, so that hyperlinks between analysis documents and generated documents continue to work.

To install the design model

- 1 Delete the model files from any previous generic Branch Teller release that already exist in the customer's workspace.

NOTE: The files from a previous release can be labeled and stored in the customer's configuration management system for the project.
- 2 Extract the design pack .zip file to a temporary folder.
- 3 Extract the \Rational Rose Model\Siebel Retail Finance Model folder and all its contents (including subfolders) from the release .zip file to the designated root folder for the design model in the project workspace. The root folder can have any name and path, such as d:\vault or c:\model. You must retain the relative structure of the subfolders that is present in the release .zip file.

NOTE: The .mdl (model) and .wsp (workspace) files load the model .cat files in the release from a subfolder structure that is relative to the model and workspace file, so folder structures must be maintained relative to these files.

Opening the Branch Teller Generic Design Model

You use the following workspace files together to open the Branch Teller model:

- teller.wsp
- entitlements.wsp

To open the Branch Teller generic design model

- 1 Navigate to the \Rational Rose Model\Siebel Retail Finance Model folder.
- 2 Double-click the teller.wsp file.
- 3 Double-click the entitlements .wsp file.

The Entitlements submodule workspace is loaded and the Entitlements classes are added into the Branch Teller model.

CAUTION: You must open the Branch Teller model by opening the workspace (.wsp files) files and not by opening the overall Rational Rose model file (the .mdl file), which loads many model classes that are not required by the Branch Teller product.

Installing the Internet Banking Design Pack

The following sections describe the contents of the design pack and how to install the design pack.

Contents of the Internet Banking Design Pack

The design pack is contained in SiebelRetailFinanceInternetBankingDesignPackvx.x.zip on the Siebel Retail Finance Internet Banking Extension Pack CD. When extracted, the design Pack contains the following elements for the Internet Banking module and Entitlements submodule:

- **A Rational Rose design model.** The model and workspace (.wsp) files are contained in the \Rational Rose Model and subfolders.
- **HTML design documents generated from the design model.** The design documents are contained in the \RoseGeneratedDocs folder and subfolders. The folder names are appended with Rational Rose unique identifiers, which allows for objects within groups in the design model having the same name as objects in other groups.
- **Analysis documents.** These documents are contained in the \FrontEnd and \RequirementsDefinition folders and their subfolders, and include requirement definitions, GUI documents, and use case documents.
- **An XML file exported from the generic design model.** This file, SiebelRetailFinanceInternetBankingvx.x.xml, is contained in the \Model XML export folder. It is used for importing Internet Banking processes into the Screen Orchestrator and FPI tools that are part of the Siebel Retail Finance Financial Transactions Workbench.

- **Templates for consistent analysis document layout.** These templates are contained in the \Templates folder. The templates are HTML (.dwt) files that you can use in an HTML editor such as Macromedia Dreamweaver for maintaining use case and GUI documents.

TIP: You can navigate through all the analysis and generated design documents for a component in the release by following the hyperlinks from the Requirements Definition document for that component. These component documents are contained in the folder \RequirementsDefinition.

TIP: To browse through the generated design documents for the design model as a whole, open the \RoseGeneratedDocs\index.html file, which contains hyperlinks to further index pages for generated documents for the different class types (financial objects, sessions, parameter objects, and so on) in the design model.

Other Model Files Included in the Release

The design model can contain some model files for entities, sessions, and other model classes that are not loaded by the Internet Banking or Entitlements workspaces, but by the workspaces for other Siebel Retail Finance modules. These model files are provided in every release to Siebel Retail Finance-licensed customers for reference purposes. The classes can be imported, if required, into an extended design model on the customer site.

NOTE: If a customer wants to use a Siebel Retail Finance class that is not loaded by the Internet Banking or Entitlements workspace in its Internet Banking implementation, the customer should inform Siebel Retail Finance. Subject to agreement on capacity, scheduling, and any associated costs, the code for the class can be added to a future generic Internet Banking product release.

Installation and Upgrade Scenarios

There are two general scenarios for installing a design pack release:

- **Simple installation or replacement scenario.** The scenario where a customer does not have a previous release of the design pack, or where the previously-installed design pack can simply be replaced with the current release, which then becomes the new generic design pack baseline for a project. The replacement scenario occurs where no design extension work has taken place on the installed generic design model.
- **Upgrade scenario.** The scenario where the model from a previous design pack was installed as the generic baseline for a project and was extended. Such extension work is lost if the domain-layer design files in the current release are copied in without a merge.

The following sections contain instructions for the simple installation or replacement scenario only. If you require information about how to upgrade to the current release from a design pack that was extended, contact Siebel Support at support@siebel.com.

Installing as the Baseline Generic Internet Banking Design Pack

This section describes how to install the current design pack release as the initial baseline design pack for a customer project, or to completely replace a previous release with the current release, if no extension work has taken place on the customer project.

■ Installing the Internet Banking Design Pack

After you extract the design pack .zip file to a temporary folder, you move the different release content areas to the required working folders or storage areas as used in the customer implementation. You can label and store the extracted files as the vx.x release in the customer's configuration management system for the project.

To install the analysis and generated design documents

- 1 Delete the analysis and generated design documents from any previous generic Internet Banking release that already exist in the customer's workspace.

NOTE: The files from a previous release can be labeled and stored in the customer's configuration management system for the project.

- 2 Extract the design pack .zip file to a temporary folder.
- 3 Extract the contents of the \FrontEnd, \RequirementsDefinition, \RoseGeneratedDocs and \Templates folders in the release .zip file to the project workspace as a whole unit. Make sure that you retain the relative position of analysis and generated design documents using the folder structures in the release .zip file, so that hyperlinks between analysis documents and generated documents continue to work.

To install the design model

- 1 Delete the model files from any previous generic Internet Banking release that already exist in the customer's workspace.

NOTE: The files from a previous release can be labeled and stored in the customer's configuration management system for the project.

- 2 Extract the design pack .zip file to a temporary folder.
- 3 Extract the \Rational Rose Model\Siebel Retail Finance Model folder and all its contents (including subfolders) from the release .zip file to the designated root folder for the design model in the project workspace. The root folder can have any name and path, such as d:\vault or c:\model. You must retain the relative structure of the subfolders that is present in the release .zip file.

NOTE: The .mdl (model) and .wsp (workspace) files load the model .cat files in the release from a subfolder structure that is relative to the model and workspace file, so folder structures must be maintained relative to these files.

Opening the Internet Banking Generic Design Model

You use the following workspace files together to open the Internet Banking model:

- e-banking.wsp
- entitlements.wsp

To open the Internet Banking generic design model

- 1 Navigate to the \Rational Rose Model\Siebel Retail Finance Model folder.

- 2 Double-click the e-banking.wsp file.
- 3 Double-click the entitlements .wsp file.

The Entitlements submodule workspace is loaded and the Entitlements classes are added into the Internet Banking model.

CAUTION: You must open the Internet Banking model by opening the workspace (.wsp files) files and not by opening the overall Rational Rose model file (the .mdl file), which loads many model classes that are not required by the Internet Banking product.