Oracle® Siebel Retail Finance

Installation Guide

Release 8.1.1 for Siebel Branch Teller

E20129-01

September 2011

ORACLE®

Oracle Siebel Retail Finance Installation Guide, Release 8.1.1

E20129-01

4 Installing the Branch Offline Server

5 Oracle BI Publisher Installation and Configuration

6 Integrating with Siebel Financial Services

Preface

This guide contains information on installing Siebel Branch Teller and configuring Siebel Branch Teller and its associated products.

Audience

This document is intended for the system administrators responsible for installing and configuring Siebel Branch Teller and its associated products.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/support/contact.html` or visit `http://www.oracle.com/accessibility/support.html` if you are hearing impaired.

Related Documents

For more information, see the following documents on Siebel Bookshelf on Oracle Technology Network (OTN):

- *Oracle Siebel Retail Finance System Requirements and Supported Platforms*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

What's New

What’s New in Siebel Branch Teller Installation Guide, Version 8.1.1

The following table lists the changes in this version of the documentation to support version 8.1.1 of the software.

Topic	Description
Chapter 2, "Installing Siebel Branch Teller on Oracle WebLogic"	This topic has been added as Siebel Branch Teller now supports Oracle WebLogic in the place of Oracle Application Server.
Chapter 5, "Oracle BI Publisher Installation and Configuration"	This topic has been added to provide information on validating the Oracle Business Intelligence Publisher installation and then creating a sample report.
Chapter 6.2, "Configuring Siebel Financial Services to Enable Siebel Branch Teller CRC"	This section has been updated with information on full integration with Siebel CRM 8.1.1.
Chapter 8, "Installing Business Process Models"	This topic has been added to provide instructions for the installation of Business Process Models.

1

Prerequisites for installation of Siebel Branch teller

This chapter contains the prerequisites for installation of Siebel Branch Teller that is common for both Oracle WebLogic and IBM WebSphere application servers for Windows and Unix. The common prerequisites are as follows:

- The Java utilities java, javac, and jar must be available at the command line. The default java install directory path is, d:\java\jdk1.6.0_18.
- ANT 1.8 must be installed and configured, and ANT_HOME must be set accordingly. The default directory path is path d:\java\apache-ant-1.8.0.
- Siebel CRM Financial Services 8.1.1 must be installed and configured if Customer Relationship Console (CRC) functionality is required for Siebel Branch Teller.

2

Installing Siebel Branch Teller on Oracle WebLogic

This chapter describes how to install Siebel Branch Teller (SBT) on the Oracle WebLogic platform. It contains the following topics:

Note: Refer to the *Siebel Retail Finance System Requirements and Supported Platforms* document on the Oracle Technology Network for information regarding the supported environments, including the supported database and application server versions, and supported versions of third- party software.

2.1 Requirements for Installing Siebel Branch Teller on Windows

The installation prerequisites for installing on Windows are as follows:

- The target machine must be clean, that is, not running any other Oracle WebLogic applications, including any previous version of Siebel Branch Teller.
- Oracle WebLogic 11g must be installed and configured. This guide assumes that the Oracle WebLogic root directory is: d:\bea.
- Oracle 11g Database must be installed and configured. This guide assumes that Oracle is installed at: d:\oracle.
- This guide assumes the CD-ROM drive is attached to drive: E:\.

2.2 Requirements for Installing Siebel Branch Teller on UNIX

The installation prerequisites for installing on UNIX are as follows:

- The target machine must be clean, that is, not running any other Oracle WebLogic applications, including any previous version of Siebel Branch Teller.
- Oracle WebLogic 11g must be installed and configured. This guide assumes that the Oracle WebLogic root directory is: /bea.

- Oracle must be installed and configured. $ORACLE_HOME must be configured to the Oracle installation location.
- Make sure the JAVA_HOME is set for the correct path. Add an entry in the environment variable for JAVA_HOME to the path where jdk is installed.
- This guide assumes the CD-ROM drive is mounted at: /mnt/cdrom.

2.3 Extracting the SBT Banking Application Files

Siebel Branch Teller files are located on Siebel Branch Teller CD for Oracle WebLogic in the SRF-BranchTellerExtPackWeblogicASORCLv811.zip\packs\Application\SRFBankingApplicationv811WeblogicOracle.jar file. You must extract this file into the local file system (drive d:\ is assumed throughout this document - replace as appropriate).

Note: All instances of vx.x in the instructions in this document refer to the version of the software that you are using.

To extract the files on Windows

1. Open a command prompt.
2. Enter the following commands:

   cd /d d:\

   jar xvf d:\packs\Application\SRFBankingApplicationv811WeblogicOracle.jar

   This command creates the \siebel folder in d:\.

To extract the files on UNIX

1. Open a command shell.
2. Enter the following commands:

   cd /tmp

   jar xvf /mnt/cdrom/packs/application/SRFBankingApplicationv811WeblogicOracle.jar

   This creates the /siebel folder in /tmp.

2.4 Setting Up the Oracle Database

Create a database on your Oracle database server machine, using all the default settings, and create a user without DBA rights on this database. For the purpose of these instructions it is assumed the database is called bankfrm and the user is also called *bankfrm*. See your Oracle documentation for information on how to create databases and users.

Note: The following steps assume you are setting up the DB in a Windows environment. If being set up on a UNIX environment the associated paths need to changed accordingly.

2.4.1 Oracle Database Prerequisites

- The Oracle command line utilities must be available at the command line.

- You must create an Oracle database and make a note of the name you give it.
- You must create an Oracle user for the database. Make a note of the user ID and password.
- You must create an entry for the database in the tnsnames.ora file for the server on which the application is to be deployed.

2.4.2 Importing the Oracle Dump File

The data for Siebel Branch Teller database is provided as an Oracle dump file, as some of the tables contain RAW data that you cannot import using standard SQL insert scripts.

In this section the following are assumed:

- The database name is bankfrm.
- The database user ID is bankfrm.
- The database password is bankfrm.

Adjust these values based on the database name, user ID, and password you chose in the previous section.

When you import the dump file, the existing database is first dropped and then the database is loaded with the contents of the \siebel\database\staging.dmp file. The db instance/name should be the one configured in tnsnames.ora. The first time you run the ant drop or ant load commands, you are prompted for a database user name, a database password, and a database instance or db name. The process creates a database.properties file at d:\temp\build_tmp\. This prompt will not appear again. To change the settings, edit the file directly. This database.properties file determines what database is used by the ant drop and ant load processes. If the application is installed in any other location, then the path of temp folder has to be modified in build.xml file which is found under Siebel/database/build.xml.

The processes, ant drop and ant load, are scripts used to drop or load the database. Siebel Branch Teller application needs to be loaded with seed data. These scripts are explained as follows:

- ant drop - To clear the database. That is, to drop all the database objects.
- ant load - To load the database with seed data. That is, to create all database objects.

If you need to use a different database, configure the database.properties file accordingly.

To import the Oracle dump file

1. Type the command cd /d d:\siebel\database.
2. To drop the database if it already exists type the command ant drop.
3. To load the database type the command ant load.

Note: These "ant load" and "ant drop" commands are case sensitive. The JAVA_HOME, ANT_HOME, and BEA_HOME environment variables are to be set previously.

Note: If you experience issues while loading this DB it may be related the AUDIT_TRAIL and REPORT_DATA tables not being imported. As a suggested work around for this, create these tables using the \siebel\database\create_tables_with_LOBs.sql.

To reset the branch information in Oracle database

- Type the command ant reset-branches.

2.5 Deploying Siebel Branch Teller on Oracle WebLogic

If you are deploying Siebel Branch Teller on a single Oracle WebLogic node (that is, not in a clustered environment), you can use the deployment script in the \siebel\deploy folder. This process is described in Deploying Siebel Branch Teller on a Single Oracle WebLogic Node.

If you are deploying Siebel Branch Teller to a clustered environment, you must follow the manual process described in Deploying Siebel Branch Teller in a Clustered Oracle WebLogic Environment.

2.5.1 Deploying Siebel Branch Teller on a Single Node

Before you run the deployment script, you must configure the weblogic-config.properties file, located in the \siebel\deploy\weblogic folder, with the correct values for your Oracle WebLogic server.

2.5.1.1 Configuring the WebLogic Deployment Scripts

To configure the weblogic-config.properties file

1. Open the weblogic-config.properties file in a text editor.
2. Change the weblogicPort setting to:

   weblogicPort = *port*

   where port is the port on which the Oracle WebLogic server listens.
3. Change the earFile setting to:

   earFile = *path*

   Where path is the path to the EAR file to be deployed; this is normally only necessary when deploying on Unix.
4. Change the oracle db credentials such as dbUser, dbPassword, dbHostname, and dbURL accordingly.
5. By default, beaHome property is set as d:\bea. If Oracle WebLogic is installed in different location then it must be changed accordingly.

To configure the deployment script

1. Open the \deploy\weblogic-config cmd file in a text editor.
2. By default,beaHome property is set as d:\bea. If Oracle WebLogic is installed in different location then it must be changed accordingly.

2.5.1.2 Configuring the BankframeResource.properties File

If you changed the port on which the Oracle WebLogic server is listening, you must make adjustments to the BankframeResource.properties file. If you have not changed the server.port setting (from its default of 7001), you can skip this section.

To configure the BankframeResource.properties file

1. Use the text editor and edit BankframeResources.properties file in following path '\siebel\common\resources\BankframeResource.properties' to replace all occurrences of the string: 7001 with the value of the port on which you have configured WebLogic to listen.
2. Save the file.
3. Generate new siebel.ear. Refer section, *Oracle Weblogic Build Process* and *WebSphere Build Process* in *Oracle® Siebel Retail Finance Banking Application Developer's Reference Guide*.

2.5.1.3 Running the Deployment Script

The database.properties file is present at d:\temp\build_tmp\. This database.properties file determines which database is used by the ant drop and ant load processes. If you need to use a different database, configure the database.properties file accordingly. You are not prompted for these details if you have already imported the Oracle database.

The deployment script automatically creates a new Oracle WebLogic server instance located at d:\bea\user_projects\domains, or /bea/user_projects/domains on Unix, and deploys the EAR file to this instance.

To run the deployment script on Windows

1. Open a command prompt.
2. Navigate to the d:\siebel\deploy directory.
3. Enter the following command:

   weblogic-config

To run the deployment script on Unix

1. Make sure you have updated the ear.path setting in build.properties to point to the location on the Unix machine where you have copied the EAR file.
2. Open a command shell, and enter the following at the command prompt:

   cd /tmp/siebel/deploy

   chmod +x weblogic-config.sh

   ./weblogic-config.sh

2.5.1.4 Starting the Application Server

After you deploy Siebel Branch Teller, you must start the application server.

To start the application server on Windows

1. Open a command prompt.
2. Navigate to d:\bea\user_projects\domains\{Siebel Instance}
3. Enter the following command:

   startWeblogic.cmd

Note: startWeblogic.cmd is created in the d:\bea\user_projects\domains\SBTDomain directory, which invokes the start scripts in bin.

To start the application server on Solaris

1. Open a command shell.
2. Enter the following at the command prompt:

   cd /bea/user_projects/siebel

   chmod +x ./startWeblogic.sh

   nohup ./startWeblogic.sh

2.5.2 Deploying Siebel Branch Teller in a Clustered Environment

To deploy Siebel Branch Teller on a Oracle WebLogic cluster you must use the Oracle WebLogic administration console. The following subtopics assume that your Oracle WebLogic cluster is configured as follows:

- There is one Administration Server configured, which manages the cluster, and this server is named adminSiebelServer.
- There is one proxy server configured to load balance requests across all nodes in the cluster, and this server is named siebelProxyServer.
- There are two or more managed servers, which are members of the cluster. The cluster is named siebelCluster1, and the individual nodes on the cluster are named siebelServer1 to siebelServern, where n is the number of nodes in the cluster.
- There is a running Node Manager instance on each machine where nodes are located.

Refer to your Oracle WebLogic documentation for information about how to configure the Oracle WebLogic cluster.

2.5.2.1 Configuring the Database Connection

To configure the database connection, you must configure a database pool and data source.

Before you configure the database connection, make sure that the Administration Server and the Node Manager are running. Refer to the Oracle WebLogic documentation for information about how to start the Node Manager and Administration Server.

To configure the database connection

1. Start the Oracle WebLogic administration console.
2. Navigate to Services > JDBC > Connection Pools in the navigation tree.
3. Select Configure a new JDBC Connection.
4. In the Database Type field, select Oracle and in the Database Driver field, select Oracle WebLogic's Oracle Driver (Type 2 XA)…, then click Continue.
5. In the Name field, type bankframePool, enter the connection details for the database that you want to connect to, and click Continue.

6. Click Test Driver Configuration to confirm that the database connection is correctly configured.
7. Select All servers in the cluster and click Create and deploy.
8. Navigate to Services > JDBC > Data Sources in the navigation tree.
9. Select Configure a new JDBC Data Source.
10. In the Name and JNDI Name fields, type bankfrm, and click Continue.
11. In the Pool Name field, select bankframePool and click Continue.
12. Select All servers in the cluster and click Create.

2.5.2.2 Updating the BankframeResource.properties File

1. Before you can access Siebel Branch Teller, you must update the BankframeResource.properties file for each node in the cluster so that the ejb.server setting points to the correct node.
2. Unzip the siebel.ear
3. Use the text editor and edit BankframeResources.properties file in following path '/siebel/resources/' to edit the node, and change the ejb.server setting to:

   ejb.server=t3://nodename:portnumber

   where nodename is the node name and portnumber is the port number on which the node is listening.
4. Save the file.
5. Zip the siebel.ear.
6. Deploy the siebel.ear in corresponding node.

   Follow above steps from 2-6 for each node in cluster.

2.5.2.3 Deploying Siebel Branch Teller

Before you deploy Siebel Branch Teller, make sure that the Administration Server and the Node Manager are running. Refer to the Oracle WebLogic documentation for information about how to start the Node Manager and Administration Server.

Also make sure that you have uploaded the siebel.ear file to the location on the machine on which the Administration Server is running.

To deploy Siebel Branch Teller

1. Start the Oracle WebLogic Administration Console.
2. Navigate to Deployments > Applications in the navigation tree.
3. Select the Install option.
4. Navigate to the location in which you have placed the EAR file and click the radio button beside the EAR file.
5. Click Target Application.
6. Select All servers in the cluster, and click Continue.
7. Select the option Copy this application onto every target for me, and click Deploy.

Note: To avoid PermGen space error, increase the heap size of the server by adding the following line in the startWeblogic.cmd file of your domain.

set JAVA_OPTIONS=%SAVE_JAVA_OPTIONS%;-Xdebug -Xms256M -Xmx1024M -XX:MaxPermSize=256M

2.5.2.4 Starting the Cluster

Refer to the Oracle WebLogic documentation for information about how to start the Node Manager, Administration Server, and the cluster. When you have started the Node Manager, Administration Server, and cluster, the deployment of Siebel Branch Teller on the cluster is complete.

Refer to the Testing Siebel Branch Teller Application, section for urls and related information for testing Siebel Branch Teller installation.

3

Installing Siebel Branch Teller on WebSphere

This chapter describes how to install Oracle's Siebel Branch Teller Banking Application on the WebSphere application server. It contains the following topics:

Note: Refer to the *Siebel Retail Finance System Requirements and Supported Platforms* document on Oracle Technology Network for information regarding the supported environments, including the supported database and application server versions.

3.1 Requirements for Installing Siebel Branch Teller on Windows

This topic outlines the installation prerequisites when installing Siebel Branch Teller on Windows. This guide assumes the installation locations in the following list; adjust the values in the examples to your machine configuration.

- The target server must be clean, that is, not running any other WebSphere applications, including any previous version of Siebel Branch Teller.

- IBM WebSphere must be installed and configured. This guide assumes that the WebSphere root directory is: d:\WAS\AppServer.
- A supported database server must be installed and configured. This guide assumes that:
  - DB2 is installed at: d:\SQLLIB.
  - Oracle is installed at: d:\Oracle.

3.2 Requirements for Installing Siebel Branch Teller on UNIX

This topic outlines the installation prerequisites when installing Siebel Branch Teller on UNIX. This guide assumes the installation locations listed below; adjust the values in the examples to your machine configuration.

- The target server must be clean, that is, not running any other WebSphere applications, including any previous version of Siebel Branch Teller.
- IBM WebSphere must be installed and configured. This guide assumes that the WebSphere root directory is: /usr/WebSphere
- A supported database server must be installed and configured. This guide assumes that:
  - DB2 is installed at: /app/IBMdb2/sqllib.
  - Oracle is installed at: /opt/oracle/OraHome1.

3.3 Extracting the SBT Banking Application Files

The Siebel Branch Teller Banking Application installation files are located in a JAR file on the installation media.

Note: : All instances of vx.x in the commands in this document should be replaced by the version of the software that you are using.

To extract Siebel Branch Teller files on Windows

1. Type the command cd /d d:\
2. Type the following command, which extracts the files to a new siebel directory on d:\

- jar xvf <install_ directory>\packs\application\SRFBankingApplication811WebSphereDB2.jar
- jar xvf <install_ directory>\packs\application\SRFBankingApplication811WebSphereOracle.jar

3.4 To extract Siebel Branch Teller files on UNIX

1. Type the command cd usr/WebSphere
2. Type the following command, which extracts the files to a new siebel directory:
   - jar- xvf <install_ directory>/packs/SRFBankingApplicationvx.xWebSphereDB2.jar

- jar- xvf <install_ directory>/packs/SRFBankingApplicationvx.xWebSphereOracle.jar

3.5 Setting up the Retail Finance Database on DB2

This topic describes how to import Siebel Branch Teller DB2 database tables, create the views and sequences, and populate the database tables.

You require the following prerequisites for setting up the DB2 database:

- A DB2 instance running on a server.
- Physical access to the console of the server running the DB2 instance.
- The password for the db2admin user on Windows or the db2inst1 user if on UNIX.
- A database created on this DB2 instance (for example SiebelRF).
- A new operating system user named BANKFRM with the password BANKFRM and with rights for this user to use the database.
- The file siebel\database\srf-db2-data.zip copied to the machine hosting the DB2 database. This file contains an export of all the required Banking Application database table data.
- The file siebel\database\srf-db2.sql copied to the machine hosting the DB2 database. This script is provided to build Siebel Branch Teller database tables, views, and sequences.
- The file, currency_denom_symbols_db2.sql should be copied to update Euro symbol in the currency_denom database. This file has to be run in a DB2 GUI client to ensure that the Euro symbol gets updated. After running this sql file, you must confirm the Euro symbol update by querying the currency_denom database table.

To create tables, views, and sequences

1. Edit the \siebel\database\srf-db2.sql file and replace all occurrences of the following placeholders with the correct values for your environment:
   a. <DB_NAME> - the database name.
   b. <DB_USERNAME> - the user name of the database administrator.
   c. <DB_PASSWORD> - the password of the database administrator.
   d. <TS_PATH> - the path on the file system of the database server where the extra table space required for Siebel Branch Teller is stored. (Refer to your DB2 documentation for more information about table spaces).
2. Open a command prompt, navigate to the unzipped folder, and enter the command:

   db2 –tvf srf-db2.sql

To import the database data

1. Unzip the export file siebel\database\srf-db2-data.zip to a folder on the DB2 server machine.
2. Open a command prompt, navigate to the unzipped folder, and enter the command:

   db2move SiebelRF import -u BANKFRM -p BANKFRM

   where SiebelRF is the database name.

3.6 Setting Up the Retail Finance Database on Oracle

Create a database on your Oracle database server machine, using all the default settings, and create a user without DBA rights on this database. For the purpose of these instructions it is assumed the database is called bankfrm and the user is also called *bankfrm*. See your Oracle documentation for information on how to create databases and users.

Note: The following steps assume you are setting up the DB in a Windows environment. If being set up on a UNIX environment the associated paths need to changed accordingly.

3.6.1 Oracle Database Prerequisites

- The Oracle command line utilities must be available at the command line.
- You must create an Oracle database and make a note of the name you give it.
- You must create an Oracle user for the database. Make a note of the user ID and password.
- You must create an entry for the database in the tnsnames.ora file for the server on which the application is to be deployed.

3.6.2 Importing the Oracle Dump File

The data for Siebel Branch Teller database is provided as an Oracle dump file, as some of the tables contain RAW data that you cannot import using standard SQL insert scripts.

In this section the following are assumed:

- The database name is bankfrm.
- The database user ID is bankfrm.
- The database password is bankfrm.

Adjust these values based on the database name, user ID, and password you chose in the previous section.

When you import the dump file, the existing database is first dropped and then the database is loaded with the contents of the \siebel\database\staging.dmp file. The db instance/name should be the one configured in tnsnames.ora. The first time you run the ant drop or ant load commands, you are prompted for a database user name, a database password, and a database instance or db name. The process creates a database.properties file at d:\temp\build_tmp\. This prompt will not appear again. To change the settings, edit the file directly. This database.properties file determines what database is used by the ant drop and ant load processes. If the application is installed in any other location, then the path of temp folder has to be modified in build.xml file which is found under Siebel/database/build.xml.

The processes, ant drop and ant load, are scripts used to drop or load the database. Siebel Branch Teller application needs to be loaded with seed data. These scripts are explained as follows:

- ant drop - To clear the database. That is, to drop all the database objects.
- ant load - To load the database with seed data. That is, to create all database objects.

If you need to use a different database, configure the database.properties file accordingly.

To import the Oracle dump file

1. Type the command cd /d d:\siebel\database.
2. To drop the database if it already exists type the command ant drop.
3. To load the database type the command ant load.

Note: These "ant load" and "ant drop" commands are case sensitive. The JAVA_HOME, ANT_HOME, and BEA_HOME environment variables are to be set previously.

Note: If you experience issues while loading this DB it may be related the AUDIT_TRAIL and REPORT_DATA tables not being imported. As a suggested work around for this, create these tables using the \siebel\database\create_tables_with_LOBs.sql.

To reset the branch information in Oracle database

- Type the command ant reset-branches.

3.7 Starting the WebSphere Application Server

The next step is to start the WebSphere application server.

To start WebSphere on Windows

1. Navigate to Start > Programs > IBM WebSphere > Application Server > First Steps.
2. Click Start the Server.

When Server server1open for ebusiness is displayed in the log on the bottom of the panel the server has started successfully.

To start WebSphere on UNIX

1. Navigate to the root of the server installation, Websphere/AppServer.
2. Change to the bin subdirectory.
3. Type the command:

   nohup ./startServer.sh server1

3.8 Starting the WebSphere Administrative Console

The administrative console is the mechanism by which WebSphere defines and configures its properties.

To start the administrative console

1. Start the WebSphere Application Server.
2. Open a Web browser and point it to http://server_name:port_number/console, where server_name is the URL/IP address of the machine that WebSphere is running on and port_number is the port the administrative console is listening on. Alternatively, you can start Administrative Console by navigating to Start >

Programs > IBM WebSphere > Application Server Vx.x > Profiles > AppSrv > Administrative Console. The assumption is that the profile name will be AppSrv by default.

3. The Login screen is then displayed.
4. The User ID required is not part of any authentication mechanism and is only used to track user changes, therefore any name is suitable.

3.9 Database Configuration

3.9.1 Configuring Database Settings in WebSphere

This topic covers the SRF-specific procedures required when configuring the database connection for the WebSphere application server, and includes the following sub-topics:

- Section 3.9.2, "Creating a Connection to the Database"
- Section 3.9.3, "Configuring WebSphere's Database Access"
- Section 3.9.4, "Configuring the Database Driver"
- Section 3.9.5, "Configuring the JDBC Driver Path"
- Section 3.9.6, "Setting Up a Data Source"

3.9.2 Creating a Connection to the Database

If the database server is not running on the same machine as the WebSphere server, you must configure a connection to the database on the WebSphere Server. The connection must be named bankfrm. Refer to your database server documentation for information about how to do this.

3.9.3 Configuring WebSphere's Database Access

You must modify the domain configuration to provide WebSphere with the user credentials associated with the bankfrm database. This modification is made to allow WebSphere access to Siebel Branch Teller database.

3.9.4 Configuring the Database Driver

The next step is to configure the database driver.

To configure the DB2 database driver

1. Log into the WebSphere administrative console as described in Starting the WebSphere Administrative Console.
2. Select Resources > JDBC Providers from the left-side panel.
3. Select Node and click New to create a new driver.
4. Click Apply.
5. The configuration screen is then displayed.
6. Complete the necessary fields for DB2. Some fields are described in the following table.

Field	Comment
Name	Set the driver name to DB2 Universal JDBC Provider.
Classpath	The classpath to the driver classes is specified by editing the DB2UNIVERSAL_JDBC_DRIVER_PATH variable. This is discussed in Configuring the JDBC Driver Path.
Implementation class name	This name is COM.IBM.DB2.JCC.DB2ConnectionPooldataSource

7. Click Apply to save the information, and select Save on the next screen.

To configure the Oracle database driver

1. Log into the WebSphere administrative console as described in Starting the WebSphere Administrative Console.
2. Select Resources > JDBC Providers from the left-side panel.
3. Select Node and click New to create a new driver.
4. Click Apply.
5. The configuration screen is then displayed.
6. Complete the necessary fields for Oracle database. Some fields are described in the following table.

Field	Comment
Name	Set the driver name to Oracle JDBC Provider.
Classpath	The classpath to the driver classes is specified by editing the ORACLE_JDBC_DRIVER_PATH variable. This is discussed in Configuring the JDBC Driver Path.
Implementation class name	This name is ORACLE.JDBC.POOL.OracleConnectionPooldataSource

7. Click Apply to save the information, and select Save on the next screen.

3.9.5 Configuring the JDBC Driver Path

When the database driver is declared, you must set the path to the driver classes.

To configure the DB2 JDBC driver path

1. Navigate to the Environment > WebSphere Variables > DB2UNIVERSAL_JDBC_DRIVER_PATH screen.
2. Set the Value field to the absolute path of the zip file containing the driver classes. The zip file containing the driver classes is usually called db2java.zip for DB2. The path to the zip file is usually d:\SQLLIB\java for DB2 for windows and <DB2 installed directory>/sqllib/java for Unix.

To configure the Oracle JDBC driver path

1. Navigate to the Environment > WebSphere Variables > ORACLE_JDBC_DRIVER_PATH screen.
2. Set the Value field to the absolute path of the jar file containing the driver classes. The jar file containing the driver classes is usually ojdbc6.jar for Oracle.

3.9.6 Setting Up a Data Source

After the database driver is declared and a path associated with it, you must set up a data source.

To set up the DB2 data source

1. Navigate to the Resources > JDBC Providers >DB2 Universal JDBC Provider > Data Sources (Version 4) screen.
2. Click New to create a new data source. The configuration screen is then displayed.
3. Change the Database server IP address and its port.
4. Some fields are described in the following table.

Field	Comment
Name	This value should be set to bankfrm.
JNDI Name	This value should be set to bankfrm.
Database Name	This value should be set to bankfrm.
Default User ID	This value should be set to bankfrm.
Default Password	This value should be set to bankfrm.

Note: The User ID and Password can be changed based on your database credentials.

5. Navigate to the Custom Properties Screen.
6. Complete the necessary fields.
7. Some fields are described in the following table.

Field	Comment
serverName	Type the IP Address of the database server machine.
portNumber	Type the TCP/IP port number where the DRDA server resides.

To set up the Oracle data source

1. Navigate to the Resources > JDBC Providers >Oracle JDBC Provider > Data Sources (Version 4) screen.
2. Click New to create a new data source. The configuration screen is then displayed.
3. Change the Database server IP address and its port.
4. Some fields are described in the following table.

Field	Comment
Name	This value should be set to bankfrm.
JNDI Name	This value should be set to bankfrm.
Database Name	This value should be set to bankfrm.

Field	Comment
Default User ID	This value should be set to bankfrm.
Default Password	This value should be set to bankfrm.

Note: The User ID and Password can be changed based on your database credentials.

5. Navigate to the Custom Properties Screen.
6. Complete the necessary fields.
7. Some fields are described in the following table.

Field	Comment
URL	The URL indicating the database from which the Data Source will obtain connections, such as "jdbc:oracle:thin:@localhost:1521:sample" as comment.

3.9.7 Configuring JDBC Connection Pools

The JDBC connection pool size should be scaled for the number of concurrent users. The database server must also be configured to fit the capacity of the Application Server. The connection pool size on the database server must be bigger than the Application Server datasource pool size.

To configure JDBC Connection Pools

1. Launch the WebSphere administration console.
2. Navigate to Resources > JDBC > Data Sources V4 > Connection Pool properties.
3. Configure the Maximum pool size setting.

3.10 Configuring WebSphere JMS Settings

You must configure JMS settings for:

- Topic connection factories
- Destinations
- Listener ports

To configure WebSphere JMS Topic Connection Factories

1. Navigate to the Resources > JMS Providers > V5 Default Messaging > Topic Connection Factories > New > Configuration screen.
2. Complete the necessary fields. Some fields are described in the following table.

Field	Comment
Name	Type exampleTopicConnectionFactory.
JNDI Name	Type eontec/jms/TopicConnectionFactory.
Port	Type Queued.

3. Set the XA field to enabled at the bottom of the screen, and save the changes.

To configure WebSphere Topic Destinations

1. Navigate to the Resource > JMS Providers > V5 default messaging provider > Topics > New > General Properties screen.
2. Complete the necessary fields. Some fields are described in the following table.

Field	Comment
Name	Type exampleTopic.
JNDI Name	Type eontec/jms/exampleTopic.
Topic	Type eontec/jms/exampleTopic.

3. Save the configuration changes.

To configure the Eontec Listener

1. Navigate to the Servers >Application Servers > server1 > Messaging > Message Listener Service > Listener Ports > New > Configuration screen.
2. Complete the necessary fields. Some fields are described in the following table.

Field	Comment
Name	Type eontecListener.
Initial State	Type started.
Connection Factory JNDI Name	Type eontec/jms/TopicConnectionFactory.
Destination JNDI Name	Type eontec/jms/exampleTopic.

3. Save the configuration changes.

3.11 Configuring the Object Request Broker Service

The Java Object Request Broker (ORB) Service must be configured to pass parameters by reference rather than by value, to optimize performance.

To configure the Object Request Broker Service

1. Navigate to the Servers > Application Servers > server1 > Container Services > ORB Service screen.
2. Enable the Pass by reference field.
3. Save the configuration changes.

3.12 Configuring the BankframeResource.properties

1. Use the text editor and edit BankframeResources.properties file in following path '\siebel\common\resources\BankframeResource.properties' to replace all occurrences of the string: 7001 with the value of the port on which you have configured WebLogic to listen.
2. Save the file.
3. Generate new siebel.ear. See, sections, *Oracle WebLogic Build Process* and *WebSphere Build Process* in *Banking Application Developer's Reference Guide*.

3.13 Configuring Thread Pool Size

The volume of threads available on the application server has a significant impact on the performance of the application. Consult your WebSphere documentation for configuring thread pool size. The following thread pool size parameters should be configured to match your system load:

- Default
- ORB.thread.pool
- SIBFAPInboundThreadPool
- SIBFAPThreadPool
- TCPChannel.DCS
- WebContainer
- server.startup

3.14 Configuring Session Management

The Web Container session cache size should be scaled for the average number of live sessions to optimize performance. Consult your WebSphere documentation for further information.

To configure Session Management

1. Navigate to Servers > Application Servers > server1 > Web Container Settings > Web Container > Session Management.
2. Configure the Session Cache Size setting.

3.15 Deploying Siebel Branch Teller on WebSphere

This topic assumes that the procedures for configuring the WebSphere server and setting up and populating the database are completed and that the WebSphere Web Browser Console is displayed.

To deploy Siebel Branch Teller on WebSphere

1. Navigate to the Applications > Enterprise Applications > Install > Preparing for the application installation screen.
2. Click Browse, and select the file siebel.ear on the local machine.
3. Select Show me all installation options and parameters and click Next.

   The Application Deployment Options screen is then displayed.
4. Select Use default virtual host name for Web and SIP modules and click Next.

   The Select Installation Options screen is displayed.
5. Select the Deploy Web Services check box.
6. Select Step 3: Provide options to perform the EJB Deploy.
7. If a DB2 database is being used, select DB2UBD_V97 option- Database type drop-down menu,Database schema as bankfrm,JDK compliance level as 6.0 and Database access type as JDBC. If an Oracle database is being used, select ORACLE_V11 option- Database type drop-down menu and leave the remaining blank.

8. Click Next on each of the following nine screens to accept the default settings. The default settings are preset when the siebel.ear file is uploaded.

   Note: The Application Resource warnings after step seven can be ignored.

9. Click Finish and Save to deploy the EAR file.
10. Navigate to the Applications > Enterprise Applications screen.

    A list of installed applications is displayed and the Siebel application has a red x to the right of it, signifying that the application is installed but not running.
11. Save the changes, click the check box to the left of the Siebel application, and click Start.
12. Navigate to the Applications > Enterprise Applications screen. A list of installed applications is displayed and the Siebel application has a green arrow to the right of it, signifying that the application is installed and running.

    Refer to the Testing Siebel Branch Teller Application, section for urls and related information for testing Siebel Branch Teller installation.

3.16 Deploying Siebel Branch Teller in a WebSphere Clustered Environment

You install Siebel Branch Teller in a clustered environment in the same way as for a non-clustered environment, apart from the steps in this topic. Also, for a clustered environment, you use the WebSphere Deployment Manager rather than the WebSphere Administrative Console for configuring the database and JMS components, and for deploying the application.

3.16.1 Requirements for Deploying Siebel Branch Teller in a WebSphere Clustered Environment

You must set up and configure the WebSphere clustered environment before deploying Siebel Branch Teller.

Consult your vendor's documentation on how to set up and configure a WebSphere clustered environment.

3.16.2 Starting the WebSphere Deployment Manager

You use the Deployment Manager to access each node in the cluster. In a clustered environment you configure the database and JMS components, and deploy Siebel Branch Teller using the Deployment Manager.

To start the Deployment Manager

1. Open a Web browser and point it to http://<server_name>:<port_number>/admin, where <server_name> is the URL/IP address of the machine on which WebSphere is running and <port_number> is the port that the Deployment Manager is listening on.
2. Start the WebSphere Application Server.

   The Login screen is displayed.

3. Type any user name in the User ID field. The User ID field is not part of any authentication mechanism but is used to track user changes, therefore you can type any name.

3.16.3 Configuring the Clustered Database and JMS Cluster Settings

You must configure the database and JMS components in the same way as described in Configuring WebSphere Database Settings and Configuring WebSphere JMS Settings with the following exceptions:

- You must do the configuration using the Deployment Manager rather than the Administrative Console.
- You must do the configuration on a per-node basis.

3.16.4 Configuring the BankframeResource.properties Cluster Settings

1. Use the text editor and edit BankframeResources.properties file in following path '\siebel\common\resources\BankframeResource.properties' to replace all occurrences of the string: 7001 with the value of the port on which you have configured WebLogic to listen.
2. Save the file.
3. Generate new siebel.ear. See, sections, *Oracle Weblogic Build Process* and *Webpshere Build Process* in *Banking Application Developer's Reference Guide*.

3.16.5 Configuring the Application Deployment Cluster Settings

You must configure the settings in the same way as described in Deploying Siebel Branch Teller on WebSphere with the following exceptions:

- You must do the configuration using the Deployment Manager rather than the Administrative Console.
- You must select the cluster for all modules on the Map Modules to Application Settings screen.
- You must select the option Synchronizing changes with Nodes when saving the changes to the repository.

Note: Proceed with main deployment path from step 2.3, Extracting the SBT Banking Application Files.

4

Installing the Branch Offline Server

This chapter describes how to install the Branch Offline Server. It contains the following topics:

Note: Refer to the *Siebel Retail Finance System Requirements and Supported Platforms* document on Oracle Technology Network for information regarding third-party software prerequisites.

4.1 Extracting the Branch Offline Server Installation Files

The Branch Offline Server software is located on Siebel Branch Teller installation media in a file called \packs\BranchServer.zip.

- Extract BranchServer.zip to <BRANCH_SERVER_ROOT>.

4.2 Configuring Branch Offline Properties

Note: All the following property files are located in the resource folder under the branchserver folder.

This topic covers the following sub topics:

4.2.1 Configuring BankframeResource.properties

Open <BRANCH_SERVER_ ROOT>\BranchServer\resources\BankframeResource.propertiesin a text editor. This topic covers setting the central server location for the offline server.

Configuring BankframeResource.properties for Oracle WebLogic

Update the following information.

1. ejb.server=t3://<CentralServerIPAddress>:<CentralServerPortNumber>
2. ejb.initialContextFactory=weblogic.jndi.T3InitialContextFactory
3. channel.http.client.url=http://<CentralServerIPAddress>:<CentralServerPortNumber>/BankFrameMCA/HttpServer
4. channel.rmi.client.url=rmi://<BranchServerIp>:10005/BranchServer

Configuring BankframeResource.properties for WebSphere

Update the following information.

1. ejb.server=iiop://<CentralServerIPAddress>
2. ejb.initialContextFactory=com.ibm.websphere.naming.WsnInitialContextFactory
3. channel.http.client.url=http://<CentralserverIpAddress>:<CentralserverPort>/BankFrameMCA/HttpServer
4. channel.rmi.client.url=rmi://<BranchServerIp>:10005/BranchServer

4.2.2 Configuring OfflineServerController.bat or OfflineServerController.sh

This topic covers configuring the JAVA_HOME and OLITE_HOME properties. These properties are configured in OfflineServerController.bat on Windows, and in OfflineServerController.sh on Linux.

To configure OfflineServerController.bat

1. Open <BRANCH_SERVER_ROOT>\BranchServer\OfflineServerController.bat or OfflineServerController.sh in a text editor.
2. Configure the JAVA_HOME variable.
3. For Windows, Set OLITE_HOME =<BRANCH_SERVER_ROOT>/OracleLite_Win
4. For Linux, Set OLITE_HOME =<BRANCH_SERVER_ROOT>/OracleLite_Lin.
5. Save the changes.

4.2.3 Configuring Offline.properties

The Offline.properties file is already configured to work on Windows. This topic covers configuring the location of the offline database in Offline.properties.

To configure Offline.properties in Linux

1. Open <BRANCH_SERVER_ROOT>\resources\Offline.properties in a text editor.
2. In the case of Linux, use

   database.url=jdbc:polite:dummy;

   database=branch;

   datadirectory=../BranchServer/data;

database.file=../BranchServer/data/branch.odb

3. LOCALHOST=<BranchServerIpAddress>.

To configure Offline.properties in Windows

1. Open <BRANCH_SERVER_ROOT>\resources\Offline.properties in a text editor.
2. Change the following Properties:

   database.url=jdbc:polite:dummy;

   database=branch;

   datadirectory=D:/BranchServer/data;

   Note: Give absolute path for datadirectory

   database.file=../BranchServer/data/branch.odb

3. LOCALHOST=<BranchServerIpAddress>.

4.2.4 Configuring eloggerfactory.properties

Open <BRANCH_SERVER_ROOT>\BranchServer\resources\eloggerfactory.propertiesin a text editor. This topic covers configuring eloggerfactory.properties.

1. Choose Type of logging for the offline server to either Log4j or Java Logging.
2. Remove the comment in the line com.eontec.mca.elogger.factory=com.bankframe.services.logger.log4j.LOG4JLoggerFactory to choose log4j logging.
3. Remove the comment in the line com.eontec.mca.elogger.factory=com.bankframe.services.logger.javautillogger.JavaUtilLoggerFactory to choose Java logging.
4. After choosing either Log4j or Java logging, comment the line com.eontec.mca.elogger.factory=com.bankframe.services.logger.console.ConsoleLoggerFactory to stop using console logging.
   - To use Java Logging, open logging.properties under BranchServer\resources\ and set the following property

     java.util.logging.FileHandler.pattern = sbt.log

     Read instructions to change the property in the same file.
   - Log4j is not shipped with this product. Download log4j.jar, version 1.2.6, from Apache website http://logging.apache.org/log4j/1.2/. See, *Banking Application Developer's Reference Guide*.

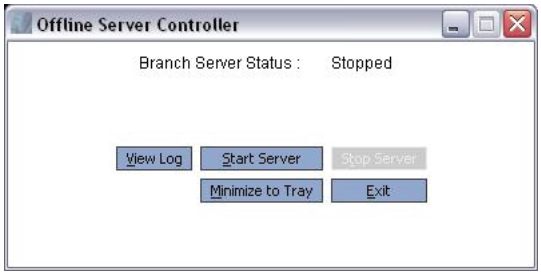
4.3 Starting the Branch Offline Server on Windows

This topic covers launching the Branch Offline database and server on Windows. Ensure that the environment variable JAVA_HOME is configured.

To start the Branch Offline Server

1. Open a command window.

2. Change directory to the location of OfflineServerController.bat in <BRANCH_SERVER_ROOT>.
3. Enter the command OfflineServerController.bat. OfflineServerController screen will open up.



4. Click the Start button and enter the Username as system and Password as oracle0. Click Ok.
5. If central server is running, the screen will show the status as online, else the status is shown as started if the central server is not running.

4.4 Starting the Branch Offline Server on Linux

This topic covers launching the Branch Offline database and server on Linux. Ensure that the system variable JAVA_HOME is configured.

To start the Branch Offline Server

1. Open a command window.
2. Change directory to the location of OfflineServerController.sh in <BRANCH_SERVER_ROOT>.
3. Enter the command ./OfflineServerController.sh. OfflineServerController screen will open up.
4. Click the Start button and enter the Username as system and Password as oracle0. Click Ok.
5. If central server is running, the screen will show the status as online, else the status is shown as started if the central server is not running.

4.5 Running Siebel Branch Teller in Offline Mode

Note: Every system where the SiebelBranch Teller Application is used, a host entry "branchServerIp" has to be made in the hosts file (under c:\windows\system32\drivers\etc in Windows) for the IP Address of the system where the branch server is installed. This host entry will redirect the Siebel Branch Teller to connect to the branch server.

To run Siebel Branch Teller in offline mode you must start the components of Siebel Branch Teller in the following order:

1. Start the Central Application Server.
2. Start the Branch Offline Server.

3. Start the Siebel Branch Teller Client Application.

You must complete the Branch Start of Day operation for your supervisor and teller users online. Completing this operation updates the offline database with all the required data, including transaction fees data.

Branch Start of Day need only be carried out once online. After that it can be done offline. After each user has logged in online once, he or she can then log on in offline mode.

The Branch runs in offline mode under the following circumstances:

- The application server is down.
- The connection between the application server and the branch offline server is severed.

5

Oracle BI Publisher Installation and Configuration

This chapter describes the steps to perform Oracle Business Intelligence Publisher (BI Publisher) setup and generating Teller Currency Transaction Reports utilizing BI Publisher. You need to install BI Publisher by downloading the same from its website. After BI Publisher 10.1.3.4.1 has been installed, you can validate its deployment by logging into BI Publisher Enterprise Server and running one sample report.

This chapter contains the following three topics.

5.1 Links related to BI Publisher

This section contains the website links related to BI Publisher. You can download, get installation information, install, and get further documentation information about BI Publisher from these links.

5.1.1 Downloading BI Publisher

You can download BI Publisher v 10.1.3.4.1 from
http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html

5.1.2 Introduction to BI Publisher

You can learn introductory details related to installation of BI Publisher from
http://www.oracle.com/technetwork/middleware/bi-publisher/documentation/index.html

5.1.3 Manually installing BI Publisher

You can learn details related to manual installation of BI Publisher in various application servers from
http://www.oracle.com/technetwork/middleware/bi-publisher/documentation/index.html

5.1.4 BI Publisher Documentation

You can learn more about the functioning of BI Publisher by referring the end user documentation from http://www.oracle.com/technetwork/middleware/bi-publisher/documentation/xmlpdocs-084437.html

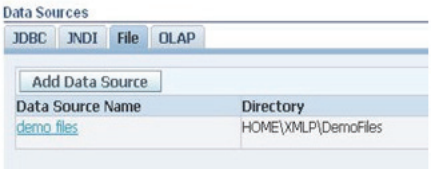
5.2 Validating BI Publisher installation

Follow these steps to validate the installation of BI Publisher:

1. Login to BI Publisher using a web browser to navigate to the following URL - http://<BIPublisherHostname>:<BIPublisherPort>/xmlpserver (for example, http://localhost:7001/xmlpserver).
2. Enter the correct username and password (the default username and password is 'Administrator/Administrator'). Once you have successfully logged in, you should see a web page like the following screen. This will confirm your installation of BI Publisher has been successful.

3. Navigate to Admin tab and click, File link under Data Sources menu.

4. Click demo files.



5. Modify the Directory path.
6. Click, Apply button to save these changes.
7. Return to the Reports tab and select Shared Folder >Financials.

5.3 Configuring CTR reports for Siebel Branch Teller 8.1.1

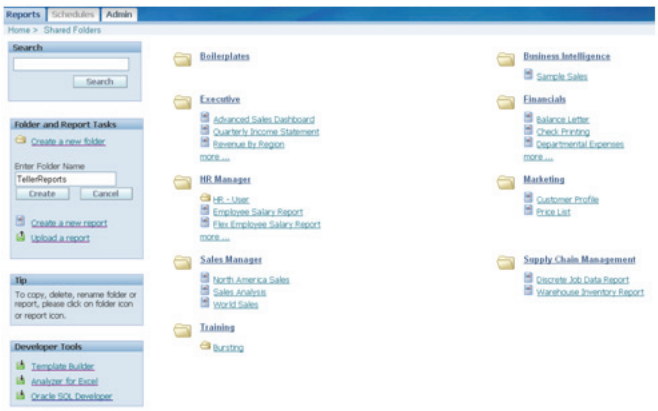
The process of configuring the CTR reports for Siebel Branch Teller includes, creating the users and their roles, creating the data source, adding host entry for BI Publisher, and then configuring the reports.

5.3.1 Adding host entry for BI Publisher

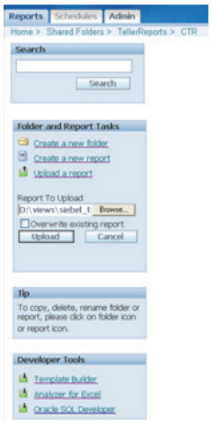
1. Edit the hosts file in system where the Teller application server is running to add following entry:
   a. <BI Publisher Server IP> BIPServer. For example, localhost BIPServer.
2. Save the file.
3. Edit the hosts file in all client systems where the Teller application will be launched to add following entry:
   a. <Teller Application Server IP> TellerServer. For example, localhost TellerServer.
4. Save the file.

5.3.2 Configuring the report

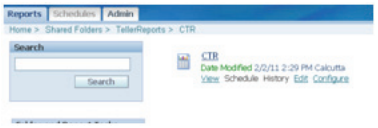
1. To configure the reports, click Report Tab >New Folder menu and enter folder name as TellerReports. Click, Create.



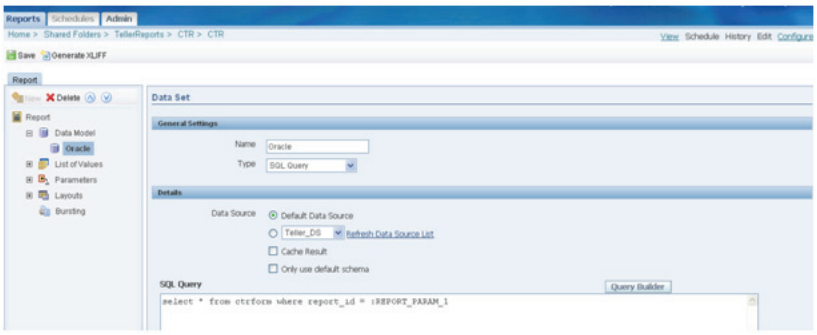
2. Click the TellerReports folder and inside this create a sub folder called CTR. Click Create.
3. Click on the newly created sub folder, CTR.
4. XDO file will be extracted from the release pack Report_RTFs.zip. It will be stored in the local system. Click, Upload Report menu link and select XDO format file. Click, Upload.
5. If a report template has already been loaded then select Overwrite existing report checkbox option.



6. After creating the report, click the edit link.



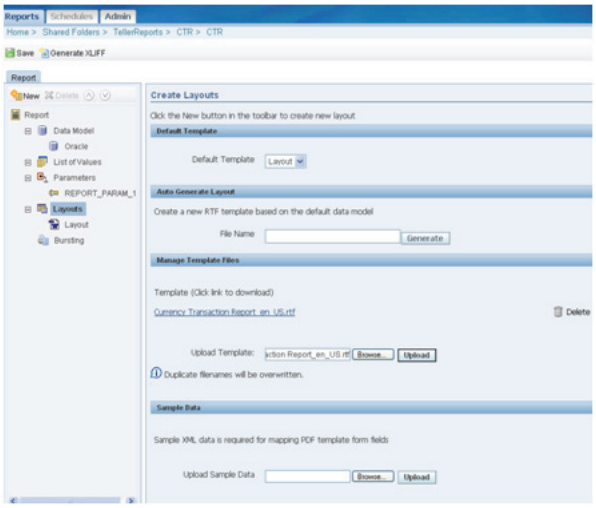
7. An error message appears.You need to select the created data source. Expand and select the Report/Data Model menu on left hand side and click New button.



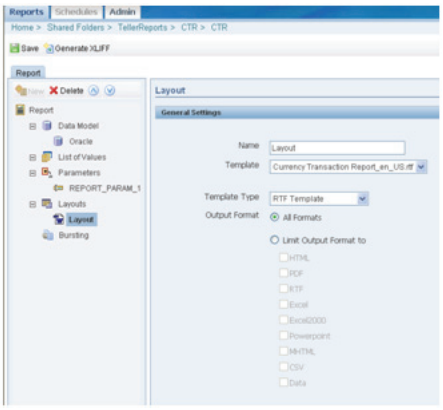
8. Under General Setting, enter Name as Oracle and select Type as SQL Query.
9. Under the Details section, select the data source which was created in the previous step and enter SQL Query as

   select * from ctrform where report_id = :REPORT _PARAM_1

   In real time, REPORT _PARAM_1 will be passed as parameter from Siebel Branch Teller to generate report.
10. Click the Save button.
11. Click the Report\Layouts menu and under manage template files, select the extracted RTF format file which was developed using Oracle BI Publisher Desktop plug-in for Microsoft Word software.
12. After selecting RTF file, click Upload button to upload report template.
13. Click the Save button.



14. Select the Report > Layouts menu and click New button. Enter the details.
15. Click the Save button.

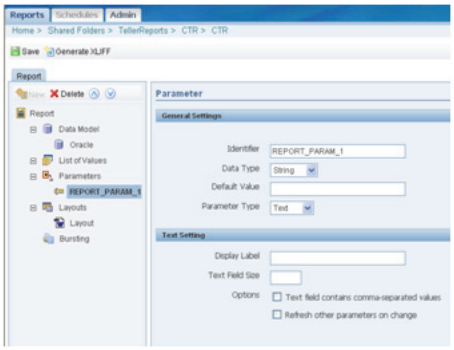


16. Select the Report > Parameters menu and click the New button and enter details as:

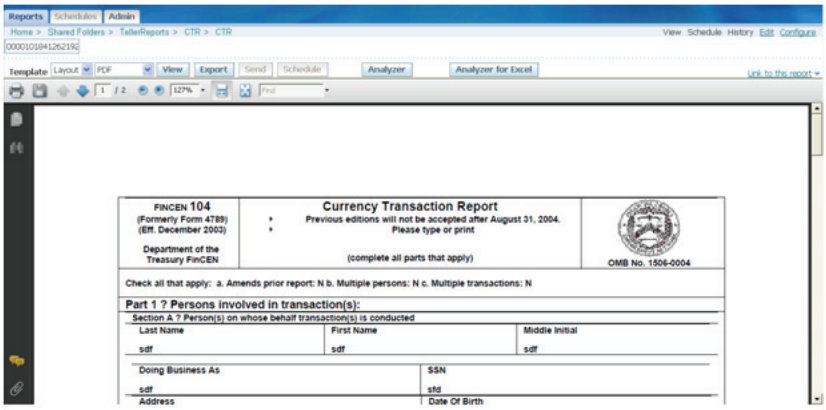
    Identifier = REPORT_PARAM_1

    Data Type = String

    Parameter Type = Text
17. Click the Save button.



18. Click the View menu in the top corner to view the newly created report.
19. In the report view page, below the Report tab there is text box where you should enter report_id from ctrform table to test report for testing purpose.

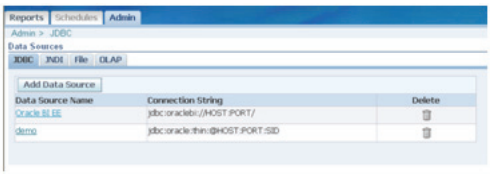


20. After the BI Publisher setup is done, create one more folder called as SupReports. Sub folders and Report structure will be same as TellerReports folder. TellerReports folder is used for teller login to BI Publisher. SupReports folder is be used, for supervisor login.

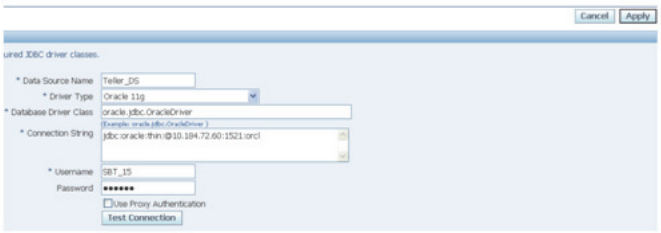
5.3.3 Creating the Data Source

Follow these steps to create a data source:

1. To create a data source navigate to Admin>Data Sources/JDBC Connections. Click the Add Data Source button.



2. Enter the required fields like Data source name, JDB URL, and user credentials. Refer the following screenshot:

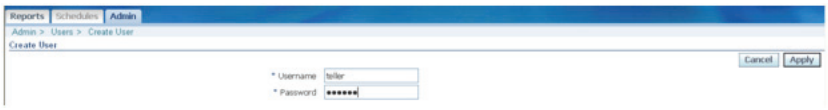


3. Click the Apply button.
4. You can test this database connection by clicking the Test Connection button. If Test Connection fails even though, the given details are correct, then you need to check whether the database server is on network by running "ping database_ IPaddress" from command prompt. If it is having any other problem, you need to check with DB administrator.

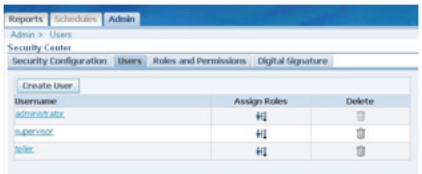
Note: You need to create a new data model only if you are configuring for IBM WebSphere. It is possible to modify the default Oracle data set for Oracle stack.

5.3.4 Creating Users and their Roles

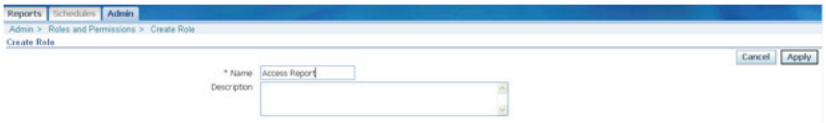
1. Navigate to Admin> Security centers / Users, and click Create User. After user creation, assign roles need to be configured for teller and supervisor users. Enter the username as teller and password as teller. Click Apply button. Refer the following screenshot.



2. Follow the same steps and create a supervisor login with username as supervisor and password as supervisor.

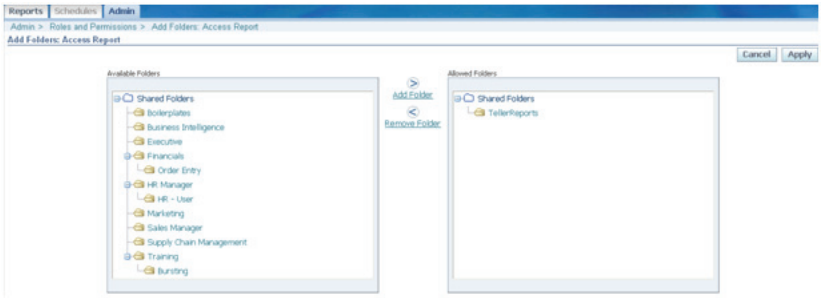


3. Click Roles and Permissions tab and click Create Role button.
4. Enter the name, **Access Report** and click Apply button.

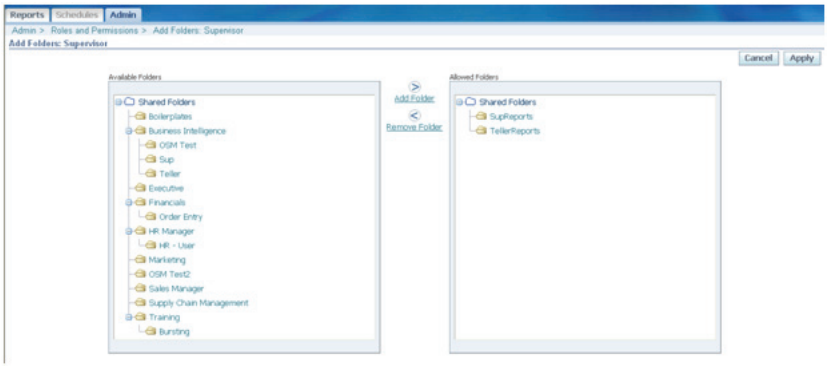


5. Follow the same steps for the Supervisor role with a role name of Supervisor.

6. Click the Add Folders icon to add the TellerReports folder under Access Report role and click the Apply button.



7. For the Supervisor role, add the SupReports and TellerReports folder and then click the Apply button.



8. Click the Add Data Source icon and add a newly created data source for Access Report and Supervisor role and then click the Apply button.

5.3.5 Required files for BI Publisher in release pack

The following two files will be extracted from release pack Report_RTFs.zip.

- CTR.xdo
- Currency Transaction Report_en_US.rtf

6

Integrating with Siebel Financial Services

This chapter describes the integration of Siebel Branch Teller with Siebel Financial Services to enable Siebel Branch Teller Customer Relationship Console (CRC) functionality. It contains the following topics:

6.1 Integration Prerequisites

To enable Siebel Branch Teller Customer Relationship Console (CRC) functionality an installation of Siebel Financial Services is required.

Sample software configuration resources are provided in the SiebelTCRCIntegrationConfigurationResources.jar file on Siebel Branch Teller installation media. Siebel Server configuration details are available in Siebel811\docs\CRC Configuration Guide - Siebel 811.pdf and Siebel8\docs\CRC Configuration Guide - Siebel 8.0.pdf" and "Siebel8\docs\How to set up Siebel 8.0 for CRC.pdf" for Siebel 8.0 Integration. These sample integration resources should be referenced before integrating Siebel Branch Teller with Siebel Financial Services.

Note: Refer to the *Siebel Retail Finance System Requirements and Supported Platforms* document on Oracle Technology Network for information regarding software prerequisites and supported software versions.

6.2 Configuring Siebel Financial Services to Enable Siebel Branch Teller CRC

The following Enterprise Application Integration books on the Siebel Bookshelf need to be consulted to configure Siebel Financial Services and enable the CRC components.

- *Overview: Siebel Enterprise Application Integration*
- *Integration Platform Technologies: Siebel Enterprise Application Integration*
- *Transports and Interfaces: Siebel Enterprise Application Integration*
- *Business Processes and Rules: Siebel Enterprise Application Integration*

- *XML Reference: Siebel Enterprise Application Integration*

6.3 Mapping Siebel Branch Teller Customers in the Siebel Database

To enable the display of a signature and photo ID for each Siebel Branch Teller customer, the customer needs to be mapped in the Siebel database. The PERSON.OWNER_ID field in the Teller database needs to be mapped to the S_CONTACT.INTEGRATION_ID field in the Siebel database. You can connect to the Siebel Database server and connect to the database there, using the sqlplus or any Oracle database client.

The following SQL maps the values for all customers in the sample data:

UPDATE S_CONTACT set INTEGRATION_ID='100000000000222' where ROW_ID='1-AJ3J';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000223' where ROW_ID='1-4WRX';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000224' where ROW_ID='1-5XX0';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000225' where ROW_ID='1-5T3X';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000227' where ROW_ID='1-EBXS';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000228' where ROW_ID='1-EH88';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000229' where ROW_ID='1-E2HL';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000230' where ROW_ID='1-FJNL';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000231' where ROW_ID='1-7L85';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000232' where ROW_ID='1-8XUJ';

UPDATE S_CONTACT set INTEGRATION_ID='100000000000226' where FST_NAME='Diana' and LAST_NAME='Abbot' and ROW_ID='1-EBWL'

Commit;

6.4 Configuring Siebel Branch Teller to Enable Siebel Branch Teller CRC

Siebel Branch Teller is fully integrated with Siebel CRM 8.1.1. For full integration with Siebel Financial Services, you must configure Siebel Branch Teller with the location of the machine on which the Siebel Financial Services Application Server is hosted. You do this by modifying the CONNECTOR_PROPERTIES column in the DESTINATION table in the Teller database. The hosts file path for Windows is **C:\WINDOWS\system32\drivers\etc\hosts** and for Unix is**\etc\hosts**. You need to have a host entry in hosts file for siebel.server pointing to the ip address of the Siebel CRM Server.

The Siebel Financial Services integration related DESTINATION_IDs in the DESTINATION table correspond to Customer Relationship Console (CRC) processes as shown in the Table.

Mapping of the DESTINATION_ID Column in the DESTINATION Table to CRC Processes

DESTINATION_ID Column	CRC Process Description
CRC001	Get the initial contact Summary Info from the Siebel application. This information includes Customer Summary, Offers, and Alerts.
CRC002	Get the list of offers for a contact from the Siebel application. This information is used to pull the Offers for a contact after a reject or accept execution on a displayed offer.
CRC003	Get the Referrals records from the Siebel application.
CRC004	Create a Referral record in the Siebel application.
CRC005	Create a Response record in the Siebel application.

If the Siebel CRM server is configured with different port other than 80, it needs to be appended with siebel server name or host name separated by ':' in CONNECTOR_PROPERTIES in DESTINATION table. When integrating with Siebel CRM 8.0 there are some changes required to the REQUEST_TXN_LAYOUT table, where the xslt files are configured in the Teller database. In the REQUEST_TXN_LAYOUT table, update the XSL_STYLESHEET column with the value CRC0008_Siebel80.xslt for TXN_CODE entry CRC0008.

There are no changes required when integrating with version of Siebel 8.1 CRM.

Values for CRC Integration in DESTINATION Table

DESTINATION_ID	CONNECTOR_FACTORY_CLASSNAME	CONNECTOR_PROPERTIES	HOST_STATUS	IS_EAB
CRC001	com.bankframe.ei.txnh andler.connector.http.H TTPConnectionFactory	URL_STRING-http://siebel.server/eai_enu/start.swe?SWEExtCmd=Execute&SWEExtSource=TCRCQueryContact&UserName=${CRCUserName}&Password=${CRCPassword}	ON_LINE	False
CRC002	com.bankframe.ei.txnh andler.connector.http.H TTPConnectionFactory	URL_STRING-http://siebel.server/eai_enu/start.swe?SWEExtCmd=Execute&SWEExtSource=TCRCQueryOffer&UserName=${CRCUserName}&Password=${CRCPassword}	ON_LINE	False

DESTINATION_ID	CONNECTOR_FACTORY_CLASSNAME	CONNECTOR_PROPERTIES	HOST_STATUS	IS_EAB
CRC003	com.bankframe.ei.txnh andler.connector.http.H TTPConnectionFactory	URL_STRING-http://siebel.server/eai_enu/start.swe?SWEExtCmd=Execute&SWEExtSource=TCRCQueryOpportunity&UserName=${CRCUserName}&Password=${CRCPassword}	ON_LINE	False
CRC004	com.bankframe.ei.txnh andler.connector.http.H TTPConnectionFactory	URL_STRING-http://siebel.server/eai_enu/start.swe?SWEExtCmd=Execute&SWEExtSource=TCRCInsertReferral&UserName=${CRCUserName}&Password=${CRCPassword}	ON_LINE	False
CRC005	com.bankframe.ei.txnh andler.connector.http.H TTPConnectionFactory	URL_STRING-http://siebel.server/eai_enu/start.swe?SWEExtCmd=Execute&SWEExtSource=TCRCInsertResponse&UserName=${CRCUserName}&Password=${CRCPassword}	ON_LINE	False

At run time, the strings ${CRCUserName} and ${CRCPassword} are dynamically replaced with the Teller logon user name and password.

There are changes in REQUEST_TXN_LAYOUT table, where the xslt files are configured in the Teller database. For CRC0008 entry in REQUEST_TXN_LAYOUT table, you need to change the XSL_STYLESHEET column updated with the value CRC0008_Siebel80.xslt for Siebel CRM 8.0 version. For Siebel 8.1 CRM version, there are no changes

7

Testing Siebel Branch Teller Application

Before you start Siebel Branch Teller make sure that the Application Server and the application (siebel.ear) have started successfully.

7.1 Logging In to Siebel Branch Teller

Use the following URLs to access the Siebel Branch Teller client and Siebel Branch Teller Administration Console functionality contained in Siebel Branch Teller:

- http://<server_name>:<port_number>/branchteller
- http://server_name>:<port_number>/branchadmin

<server_name> is the name of the server on which Siebel Branch Teller is deployed and <port_number> is the port that the Application Server is listening on. The following table lists the Administrator, Teller and Supervisor logon accounts that are provided in the sample data.

Siebel Branch Teller Account Details

Name	Logon Name	Password	Branch	User Type	User ID	Privileges / Actor Group
Peter Foley	pfoley	pfoley	9000000 000	Administrator	00000000 0002001	Central Administrator
Karen Saunders	ksaunders	ksaunders	9000000 001	Administrator	00000000 0000037	Central Administrator, Entitlements Administrator
Karen Marino	kmarino	kmarino	9000000 001	Teller	00000000 0001529	Teller
Susan Drew	sdrew	sdrew	9000000 001	Teller	00000000 0001530	Senior Teller
David Reid	dreid	dreid	9000000 001	Supervisor	00000000 0001527	Supervisor

7.2 Enabling Support for Peripheral Devices

Support for peripheral devices connected to RS232 serial ports and IEEE 1284 parallel ports is provided through the Java Communications API. In this release, Java

Communication API 2.0 is shipped. It is available in CommonSoftwareResource.jar in 3rdPary\lib\comm folder.

Because the Java Communications API relies on a native library, you must install it into your JRE on every client machine so that the JRE can load the native library at run time. If you are installing the extension on a JDK, note that you must install all files in the JRE sub folder of the JDK.

Note: If you re-build the Siebel Branch Teller EAR file to include the comm.jar file you do not need to install the comm API on every client machine. Refer to the *Siebel Retail Finance Banking Application Developer's Reference* for information.

To install the Java Communications API extension

1. Make sure the java_home is set for the correct path. Add an entry in the environment variable for JAVA_HOME to the path where jdk is installed. To check the correct path go to control panel --> java --> java tab --> view. Note that the JRE Settings point to the JRE and not JDK.
2. Download the Java Communications API 2.0 from http://www.oracle.com/technetwork/java/index-jsp-141752.html. In the event that the Java Communications API 2.0 is unavailable it can be found in \siebel\3rdParty\lib\comm\.
3. Copy the win32com.dll file to the <JRE_root>\bin directory.
4. Copy the comm.jar file to the <JRE_root>\lib\ext directory.
5. Copy the javax.comm.properties file to the jre\lib directory.

7.3 Logging In to the MCA Services Administration Application

Use the following URL to access the MCA Services administration functionality contained in Siebel Branch Teller:

- http://servername:port/BankFrameMCA/ServiceServlet

  where servername is the name of the server where Siebel Branch Teller is deployed and port is the port that the application server is listening on (typically this is 7001 for Oracle WebLogic and 9080 for IBM WebSphere).

8

Installing Business Process Models

Follow these steps to install the HTML Business Process Model Viewer:

1. Extract the contents of SBT 8.1.1 BPM.zip file. A folder called SBT 8.1.1 BPM will be created.
2. Navigate to the unzipped folder, SBT 8.1.1 BPM. Double-click, index.htm file to launch the HTML Business Process Model Viewer.

9

Installing the Screen Orchestrator

This topic covers installation of the Siebel Branch Teller Screen Orchestrator.

9.1 Screen Orchestrator Installation Prerequisites

- Before you install Screen Orchestrator, you must install and configure the Java Runtime Environment (JRE).
- The Adobe Acrobat Viewer must be installed to view the Screen Orchestrator Help file.

Note: Refer to the *Siebel Retail Finance System Requirements and Supported Platforms* document, on Oracle Technology Network, for information regarding third-party software prerequisites.

9.2 Migrating from a Previous Version of Screen Orchestrator

If you have a previous version of the Screen Orchestrator installed, you must uninstall that version and save any work before you install the new version.

To migrate from a previous version of Screen Orchestrator

1. Save to an archive location any work in subdirectories of the directory where Screen Orchestrator is installed.
2. Using your previous Teller Install Media Pack, navigate to the setup.exe file in the Screen Orchestrator directory on the Workbench installation media, and double-click on the setup.exe file.

   Screen Orchestrator is uninstalled.

Note: The processes.xml file is not deleted from the resources directory. This file must be preserved when migrating, because the contents of the file change as new processes are added using the Screen Orchestrator.

9.3 Installing the Screen Orchestrator

To install the Screen Orchestrator, extract the zip file from the jar file.

9.4 Screen Orchestrator Run-Time Requirement

Screen Orchestrator checks the Java version before its starts. It supports Java 1.1, 1.5 and 1.6 (up to update 11). Java versions with 1.6_12 and higher are not supported.

9.5 Setting the Screen Resolution

For optimum display, set the screen resolution of the machine on which you install Screen Orchestrator to 1024 x 768 pixels.