

Seibel CRM Integration Interface

Version-11.1

9NT1368-ORACLE FCUBSV.UM 11.1.0.0.0.0.0

[August] [2010]

Oracle Part Number E51575-01



Document Control

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Created on: October 01, 2008	Revision No: Final	
Updated by: Documentation Team	Reviewed by: Development/ Testing teams	Approved by: Software Quality Assurance Team
Updated on: August13, 2010	Reviewed on: August 06, 2010	Approved on: August 06, 2010

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1. About this Manual

1.1 Introduction

This manual outlines the requirements to support the integration of the Siebel FINS CRM product with Oracle FLEXCUBE.











This manual provides you pertinent explanations about the various maintenances required for the smooth exchange of data between Oracle FLEXCUBE and a Siebel-CRM system. Besides this User Manual, while maintaining the interface related details, you can invoke the context sensitive help available for each field. This help encapsulates the purpose of each field within a screen. Placing the cursor on the relevant field and striking the <F1> key on the keyboard can obtain information specific to a particular field.














1.1.1 Acronyms and abbreviations

FCUBS	Oracle FLEXCUBE Universal Banking Software
CRM	Customer Relationship Management

1.1.2 Glossary of Icons

This User Manual may refer to all or some of the following icons.

Icons	Function
	New
	Copy
	Save
	Delete
	Unlock
	Print
	Close
	Re-open
	Reverse
	Template

Icons	Function
	Roll-over
	Hold
	Authorize
	Liquidate
	Exit
	Sign-off
	Help
	Add row
	Delete row
	Option List
	Confirm
	Enter Query
	Execute Query

Refer the Procedures User Manual for further details about the icons.

2. Oracle FLEXCUBE Siebel - CRM Integration

2.1 Introduction

Siebel CRM is an application through which information relating to a customer is captured. These could be from the creation of a customer profile to creating and operating various financial products available with your bank. These requests are captured in Siebel and sent to Oracle FLEXCUBE which is the backend processor for further processing.

Broadly, there are two facets:

- Request messages from Siebel to Oracle FLEXCUBE. This includes the following:
 - Creation of a customer
 - Modification of a customer
 - Creation of a customer account
 - Creation of a term deposit account
 - Request for a term deposit rollover
 - Request for an account statement
 - Modification of a customer account address
 - Creation of a new account address
 - Providing a single customer view (SCV)
- Handoff of product data from Oracle FLEXCUBE to Siebel. This includes the following:
 - Handoff of Account class details
 - Handoff of Interest Rate code details
 - Handoff of Consumer Lending product details

2.2 Oracle FLEXCUBE - Siebel CRM Integration

Siebel CRM is an application through which information pertaining to a customer can be captured. The information could relate to, say, creation of a customer to creating and operating various financial products available with your bank. These requests are captured in Siebel and sent to Oracle FLEXCUBE which is the backend product processor for further processing.

The following points are noteworthy:

- The message formats that are exchanged with Siebel are in its own Common Object Format.
- The message format in which Oracle FLEXCUBE processes the messages is in FCUBS published XML format. As there is a difference in the two formats, and also some possible differences in the values that the two systems operate on, a middle layer adapter is used which transforms and translates the formats between the two systems.

2.2.1 Siebel Adapter

The FCUBS Inbound Interface Gateway provides a set of synchronous deployment patterns using which external systems can communicate with the Oracle FLEXCUBE backend.

Siebel provides a common integration interface called the Common Objects (CO) which is XML based and through which it interfaces with any external system. Hence, all messages exchanged between Oracle FLEXCUBE and Siebel and vice-versa, are in an XML format that is published by Siebel in the Common Object format.

Since the formats of the message published by Oracle FLEXCUBE for all the operations are different from the Common Object format, a middle layer interface does the conversion between the two formats. This middle layer is called the adapter. There are two types of adapters:

- An adapter for handling the incoming requests from Siebel and sending appropriate response messages
- An adapter for handling the notification messages from FCUBS.

A brief explanation about the two adapters is given below:

2.2.1.1 Incoming Adapter


This adapter is a set of synchronous Webservices which is based on the WSDLs that are published for Oracle FLEXCUBE Siebel-CRM Integration. The functionality of the incoming adapter is to receive a request message from Siebel in the common object format and do the following:

- Transform the message from the common object to the standard FCUBS format
- Translate the values in the request XML which may be in common object format to FCUBS format
- Call the appropriate FCUBS Web Service to perform the operation

The Siebel in adapter is currently designed to handle the following operations. Siebel sends request messages corresponding to these Service and Operations:

Description	Service Name	Operation Name
Customer Creation	FCUBSCustomerService	CreateCust
Customer Modification	FCUBSCustomerService	ModifyCust
Savings Account Creation	FCUBSCustomerAccountService	CreateCustAcc
Description	Service Name	Operation Name
Term Deposit Creation	FCUBSTDSERVICE	CreateTDAcc
Term Deposit Rollover	FCUBSTDSERVICE	ModifyTDRollover
Account Address Modification	FCUBSCustomerAccountAddress Service	ModifyCustAccAdr
Account Statement Request	FCUBSCustomerAccountFinancialService	RequestAccStmnt
Single Customer Summary View	FCUBSSCVService	QuerySCVCustSumm
Single Customer	FCUBSSCVService	QuerySCVAccDet

Description	Service Name	Operation Name
Detailed View		ails
Single Customer Transaction View	FCUBSSCVService	QuerySCVTxnDetails

 You need to refer to the document on message documentation for relevant information on the pertinent operations.

2.2.1.2 Siebel In Adapter Value Translation

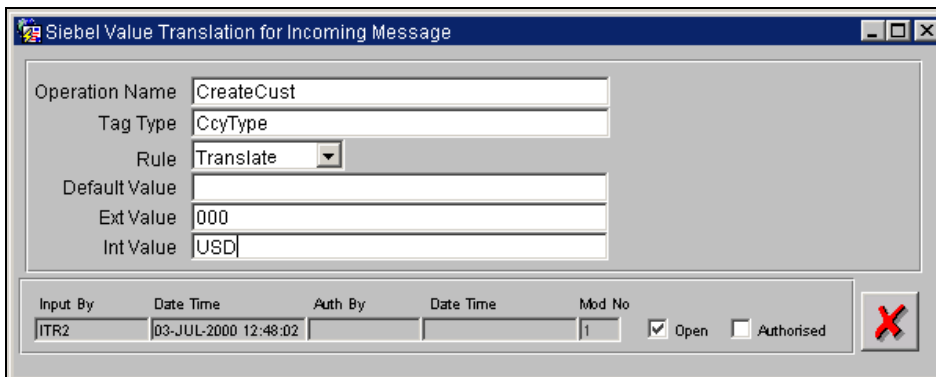
The values sent by Siebel in the Common Object format may be different from the one that Oracle FLEXCUBE expects. So, a value translation needs to be done for some of the tags.

There are two types of translations:

- Setting Default value
- Translating from one value to another

The translation has to be maintained at an operation level. As an example, you can take CreateCust for a Customer creation request.

You maintain such value translation details through the 'Siebel Value Translation for Incoming Message' screen.



Here, you specify the following:

Operation Name

This is the FCUBS operation code. As an example, particular translation maintenance could be for a customer creation. So, you need to enter 'CreateCust' here.

Tag Type

This pertains to a group of related fields under a particular type.

As an example, consider a tag type, say, 'CcyType' (currency type). You could be having a 'Bought_Currency' field and a 'Sold_Currency' field within a request message. Instead of maintaining translation details against each field, related fields are clubbed under a particular tag type. So, in our example, the 'Bought_Currency' and the 'Sold_Currency' fields can be clubbed under a tag named as 'CcyType'.

Rule

The rule governing a translation. You can choose one of the following:


- Default
- Translate

Choosing the 'Default' option means that you need to specify the default value for a specific 'Tag Type'.

If you choose the 'Translate' option, you need to specify the external value and the internal value of a particular 'Tag Type'. The external value pertains to the value coming from an external system and the internal value is the value to which this external value needs to be mapped to.

Default Value

If your chosen translation rule is 'Default', you need to specify the default value for a particular 'Tag Type'.

 The 'Ext Value' and the 'Int Value' fields get disabled if you choose the translation rule as 'Default'.


Ext Val

If your chosen translation rule is 'Translate', you need to specify the external value of a particular 'Tag Type'. The external value pertains to the value coming from an external system.

 Here, the 'Default Value' field remains disabled.

Int Val

If your chosen translation rule is 'Translate', you need to specify the internal value of a particular 'Tag Type'. The internal value pertains to the value to which an external value for a particular tag type needs to be mapped to. Here, the 'Default Value' field remains disabled.

 Note that if a translation maintenance has to be done for different operations, say for example customer creation, customer modification etc, then different maintenances need to be done separately.

2.2.1.3 Outgoing Adapter

This adapter handles the notification messages generated by Oracle FLEXCUBE on certain events. The notification messages are put into the respective queues of the external system/adapter.

These notifications are generated as per specific XML message formats, indicating that a particular event has happened in Oracle FLEXCUBE. Each of the notifications is uniquely identified by what is called a notification code which occurs in the notification message as one of the tags.

The Siebel out adapter is currently designed to handle the following notifications:

Notification Code	Service	Operation	Comment
NOTIF_IC_UDEV ALS_NEW	FCUBSAccClassService	QueryAccount Class	When new interest rate details are maintained, Oracle FLEXCUBE triggers this notification. In response, the adapter issues a query pertaining to the Account class.
NOTIF_CA_ACCL ASS_MOD	FCUBSAccClassService	QueryAccount Class	Any change in an Account class details triggers off this notification. In response, the adapter issues a query pertaining to the account class.
NOTIF_CA_CUST ACC_STAT	FCUBSAccService	QueryCustAc c	When the status of an account is changed, Oracle FLEXCUBE triggers this notification. In response, the adapter issues a query pertaining to the account details.
NOTIF_CA_CUST ACC_NEW	FCUBSAccService	QueryCustAc c	When a new account is created, Oracle FLEXCUBE triggers this notification. In response, the adapter issues a query pertaining to the account details.
NOTIF_IC_CHG_ CLASS_NEW	FCUBSAccClassService	QueryAccount Class	When a new charge class is maintained, Oracle FLEXCUBE triggers this notification. In response, the adapter issues a query on the account class.
NOTIF_IC_CHG_	FCUBSAccClassService	QueryAccount	When a charge class is modified, Oracle

Notification Code	Service	Operation	Comment
CLASS_MOD		Class	FLEXCUBE triggers this notification. In response, the adapter issues a query on the account class.
Notification Code	Service	Operation	Comment
NOTIF_CA_ACCLASS_UDE	FCUBSAccClassService	QueryAccount Class	When an account class UDE maintenance is modified, Oracle FLEXCUBE triggers this notification. In response, the adapter issues a query on the account class.
NOTIF_IC_UDEVALS_MOD	FCUBSAccClassService	QueryAccount Class	When interest rate details are modified, Oracle FLEXCUBE triggers this notification. In response, the adapter issues a query on the account class.
NOTIF_CL_PRODUCT	FCUBSCLProdService	QueryCLProduct	When a new CL product is created, Oracle FLEXCUBE triggers this notification. In response, the adapter issues a query on the CL product.

Each of the above notifications maps to a corresponding Oracle FLEXCUBE Service and Operation code. In case of Siebel, the above table gives the mapping.

On receipt of any one of the above notifications, the adapter builds an XML query message corresponding to the service and operation to the response. The response message sent by Oracle FLEXCUBE is sent back to Siebel.



You need to refer to the document on message documentation for relevant information on the pertinent operations.

2.2.1.4 Siebel Out Adapter Value Translation

The values sent by Oracle FLEXCUBE in its own XML format and the corresponding values in an external system may be different. So, a value translation needs to be done for some of the tags.

There are two types of translation:

- Setting Default value
- Translating from one value to another

The translation has to be maintained at an operation level. As an example, you can take CreateCust for a Customer creation request.

You maintain such value translation details through the 'Siebel Value Translation for Outgoing Message' screen. The screen is shown below:

Operation Name	CreateCust
Tag Type	CcyType
Rule	Translate
Default Value	
Int Value	USD
Ext Value	000

Input By	Date Time	Auth By	Date Time	Mod No	Open	Authorised
ITR2	03-JUL-2000 14:28:11			1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Here, you specify the following:

Operation Name

Specify the relevant operation name. As an example, a particular translation maintenance could be for a customer creation. So, you need to enter 'CreateCust' here.

Tag Type

This pertains to a group of related fields under a particular type.

As an example, consider a tag type, say, 'CcyType' (currency type). You could be having a 'Bought_Currency' field and a 'Sold_Currency' field within a request message. Instead of maintaining translation details against each field, related fields are clubbed under a particular tag type. So, in our example, the 'Bought_Currency' and the 'Sold_Currency' fields can be clubbed under a tag named as 'CcyType'.

Rule

The rule governing a translation. You can choose one of the following:

- Default
- Translate

Choosing the 'Default' option means that you need to specify the default value for a specific 'Tag Type'.

If you choose the 'Translate' option, you need to specify the external value and the internal value of a particular 'Tag Type'. The external value pertains to the value coming from Oracle FLEXCUBE and the internal value is the corresponding value in the Common Object format.

Default Value

If your chosen translation rule is 'Default', you need to specify the default value for a particular 'Tag Type'.



The 'Ext Value' and the 'Int Value' fields get disabled if you choose the translation rule as 'Default'.

Ext Val

If your chosen translation rule is 'Translate', you need to specify the external value of a particular 'Tag Type'. The external value pertains to the value coming from Oracle FLEXCUBE.



Here, the 'Default Value' field remains disabled.

Int Val

If your chosen translation rule is 'Translate', you need to specify the internal value of a particular 'Tag Type'. This internal value is the value of the corresponding 'Tag Type' in the Common Object format. Here, the 'Default Value' field remains disabled.



Note that if a translation maintenance has to be done for different operations, say for example customer creation, customer modification etc, then different maintenances need to be done separately.



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[August] [2010]
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