

Oracle® Documaker

**Integration with Oracle
Banking Platform**

Installation and Configuration Guide

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Preface

This document contains information necessary for the installation and configuration of integration components to create a complete solution using Oracle Banking Platform (OBP) and Oracle Documaker.

Audience

This document is intended for users who have installed Oracle Banking Platform and Oracle Documaker Enterprise Edition and who need to integrate the two products. Familiarity with Oracle Documaker components is recommended. Please see the Oracle Documaker Administrators Guide, particularly the Using Documaker Web Services chapter for a deeper understanding of integration components.

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CONVENTIONS

The following text conventions are used in this document:

Convention	Description
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands, URLs, code in examples, and information you enter.

Tips, Notes, and Warnings

- a. Tip provides a better way to use the software.
- b. Note contains special information and reminders.
- c. Warning contains critical information that if ignored, may cause errors or result in the loss of information.

OVERVIEW

This document describes how to install and configure the needed components of Oracle Documaker Enterprise Edition for integration with the Oracle Banking Platform (OBP).

This chapter includes the following topics:

- *Overview* on page 12
- *Product Overview* on page 13
- *Integration Component Overview* on page 15

Reference	Description
OBP Installation Guide	This document provides instructions for installing and configuring Oracle Banking Platform.
Oracle Documaker System Requirements	This document describes the system's hardware and software requirements for the various applications that comprise Oracle Documaker.
Oracle Documaker Enterprise Edition Installation Guide	This manual provides instructions for installing Oracle Documaker Desktop Enterprise Edition.
Oracle Documaker Enterprise Edition Administrator's Guide	This manual provides in depth details regarding the use and configuration of the Oracle Documaker components.

Product Overview

Documents form an integral part of Banking transactions. A customer comes across various kinds of documents which facilitate easy processing of loan application, credit appraisal and loan disbursal.

Documents serve very important function of providing information to both the Bank. Documents provide information for the customer and the bank and serve as a legal tool for use in any future dispute. All documents are therefore indexed and archived properly for future retrieval.

Outbound Documentation systems are used to define, build and distribute various documents targeting the external players (like Customers, etc.).

The integration of Oracle Banking Platform and Oracle Documaker enables document automation for Oracle Banking Platform customers.

Pre-Requisites

This guide assumes that you have reviewed the Oracle Documaker Enterprise Edition Installation Guide and have a successfully installed system that you can now use to begin the integration pack installation and configuration. This guide also assumes you are familiar with the files and directory structure outlined in the Oracle Documaker Enterprise Installation guide. If you have any questions, please contact Oracle Support with the information listed in the back of this document.

This guide details the process to configure the OBP to Oracle Documaker integration package. It is assumed that there is an existing OBP and Oracle IPM server available to validate integration.

Integration Component Overview

Oracle Documaker Enterprise Edition (ODEE) is a standalone application developed for Electronic Document Automation. Integration of ODEE with Oracle OBP is completed by web service communication methods supported by both OBP and Oracle Documaker.

The Documaker Enterprise Edition installation comes with a sample set of forms for installation validation and system demonstration. The OBP-Documaker Integration pack provides targeted sample banking form resources, called “Model Bank” forms that replace the sample forms provided with the ODEE installation. The integration pack also provides additional components used to support the archive and distribution capabilities of the complete OBP-Documaker solution. This integration pack contains:

Resource	Description
dmres\deflib	master.lby, master.mdx, and master.dbf files for uploading into resource library tables. Contains the sample document templates for Model Bank. Updated afgjob and .dfd files for reference.
dmres\input	Sample extract file to use for integration pack installation validation and web service validation input files.
dmres	Fsisys.ini - updated for reference.
docfactory_lib	Updated .jar files to support integration with IPM and feedback loop from Oracle Documaker to OBP upon document generation and dispatch. Only included in versions 12.3 and prior.
docmaker\bin	Updated resource to support locale specific formatting. Included only in versions 12.3 and prior
templates	obpemailtemplate.txt and printcontroltemplate.xml used by distribution components to format output destination specific content.

Download the integration pack from Oracle Software Delivery Cloud Oracle. Once the integration pack is downloaded, unzip the contents into a source directory that you can use temporarily while completing the integration configuration tasks.

Installing Oracle Documaker Enterprise Edition Integration Extensions

This chapter describes how to install and configure the needed components of Oracle Documaker Enterprise Edition for integration with Oracle Banking Platform (OBP).

This chapter includes the following topics:

- *Update Enterprise Edition Environment on page 16*
- *Resource Configuration on page 17*
- *Web Application Configuration on page 20*

Update Enterprise Edition Environment

Use the steps below to update and configure the Oracle Documaker Enterprise Edition environment to support integration with Oracle Banking Platform.

Step A: Update Directories and Core Files

1. Stop both the Oracle Documaker Document Factory Service (ODDF Service) and Docupresentation service.
2. Obtain the following files from IPM server, typically in the \$ORACLE_HOME/ipm/lib/ecm-client.zip, and place in the docfactory\lib directory on the ODEE server:
 - a. oracle.webservices.standaloneclient.jar
 - b. imaging-client.jar
 - c. ecm-client.jar
 - d. ecm-wls.jar
3. Update the utllib resource in the documaker\bin directory. (If using ODEE 12.1.0, complete this step. Otherwise, skip to next step)
 - a. Copy the existing utlw32.dll or utllib.so to serve as a backup.
 - b. Choose the utlw32.dll for Windows or the utllib.so.linux or ulllib.so.solaris. Rename the utllib.so.linux or utllib.so.solaris to utllib.so and update within the bin directory.
4. Supply distribution template files. Put the following files from the extracted OBP_Update.zip into the documaker directory.
 1. obpemailtemplate.txt
 2. printcontroltemplate.xml

5. Establish integration point directories. Create the following directories in the documaker\mstres\dmres directory:
 - a. post
 - b. results-archive
 - c. scratch

Step B: Configure Integration Components

Note	As you enter the options within the Documaker Administrator, use the UserTag or Comment field to track the updates. This will allow you to query by a consistent value on this field to quickly summarize changes. Access these columns in the Administrator by selecting View; Columns in the properties sub-tab.
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1. Update the transaction identification components using the Documaker Administrator web application.
 - a. Login to Oracle Documaker Administrator web application using the URL and credentials established during Oracle Documaker Enterprise Edition installation.
 - b. Click System.
 - c. Expand the Assembly Line, default name is Assembly Line 1.
 - d. Highlight the Receiver and click Configure.
 - e. On the Receiver configuration tab, click FileReceiver Context, FileReceiver Group and set the following properties.

Property	Value	Active
TextDelimiter		Unchecked
XMLDelimiter		Unchecked
XMLTagDelimiter	Recipient	Checked
stripnamespace	False	Checked

- f. Click Save.
- g. Navigate to the Systems Overview tab.
- h. Highlight the Identifier and click Configure.
- i. On the Identifier configuration tab, click Identifier Context, Identifier Group and set the following properties:
- j. Click Save.

Property	Value	Active
TextDelimiter		Unchecked

Property	Value	Active
XMLDelimiter		Unchecked
XMLTagDelimiter	Recipient	Checked
Stripnamespace	False	Checked

Step C: Configure Archive and Distribution Integration Components

1. Navigate to the Systems Overview tab.
2. Highlight the Archiver and click Configure.
3. Create a new Context to support bursting the PUBS row print stream into individual form PDF files for use in individually archiving and sending for distribution.

Note	<ul style="list-style-type: none"> • All properties added in the Archive configuration are required unless otherwise noted as optional • Use these same steps for the remaining Context additions below.
-------------	--

- a. Click on the green + to Create Context.
- b. Enter the Context Name, Category, Group Name, Property and Value as listed in the first row of the table below. Leave Active as checked.

Note	Enter the Context Name LISTENER in capital letters.
-------------	--

Context Name	Category	Group Name	Property	Value
LISTENER	OBPPDFB urster	Configurat ion	phase.name	oracle.documake r.ecmconnector.n gpcomponents.N GPPDFBurst
			phaselisten er.pdfburst er.require.f orm.index	True

4. Create a new Context to support collecting and storing the feedback information for OBP to be notified of the results of generation (archive).

Context Name	Category	Group Name	Property	Value
LISTENER	OBPResultsWriter	Configuration	phase.name	oracle.documaker.ecmconnector.ngpcomponents.archiveresults.NGPRResultsWriter
			phaselistener.ngpresultswriter.base.directory	<i>c:\oracle\odee_1\documaker\mstrres\dmres\results-archive</i> Where this value is dynamic based on your installation location
			phaselistener.ngpresultswriter.ngpsubmit.type	ARCHIVE

5. Create a new Context to support collecting and storing the feedback information for OBP to be notified of the results of dispatch (post or email).

Context Name	Category	Group Name	Property	Value
LISTENER	OBPDispatchResultsWriter	Configuration	phase.name	oracle.documaker.ecmconnector.ngpcomponents.archive.results.NGPRResultsWriter
			phaselistener.ngpresultswriter.base.directory	<i>c:\oracle\odee_1\documaker\mstrres\dmres\results-archive\</i> Where this value is dynamic based on your installation location

Context Name	Category	Group Name	Property	Value
			phaselister.ngpresultswriter.ngpsubmit.type	DISTRIBUTION

6. Create a new Context to configure the archive destination used for output batches where the output is broken into individual print streams per form and sent to IPM. This destination configuration provides the details for IPM access and authentication and identifies the Listener processing that should be executed within the destination.

Context Name	Category	Group Name	Property	Value
DESTINATION	OBP_Archive	Configuration	destination.name	oracle.documaker.ecmconnector.ngpcomponents.NGPIPMDestination
			destination.ipm.application.name	The application name within IPM where the OBP documents should be stored.
			destination.ipm.connection.string	http://ip:port/imaging/ws
			destination.ipm.user.name	
			destination.ipm.password	
			phaselister	OBPPDFBurst
			phaselister	OBPResultsWriter

7. Create a new Group within the Destination – OBP_Archive Context to set any default or mapped data that should be sent into the destination processing. This default and mapped data can be used at any point in the destination’s processing – for example, if the destination archive’s to IPM and certain values are needed for indexing, or in the case of the OBP_Post destination, the Default and Mappings are used to capture data for the print control file.

To create a new Group, follow these Steps:

- Highlight the Category for which you want to add a new Group and click + Create Group.
- Enter the Group Name, Property and Value as shown in the first row below and leave Active as checked.
- Click on the + to Create new property and enter the Property and Value for the remaining properties listed in the table.

Group Name	Property	Value
Defaults	default	

Group Name	Property	Value	Purpose
Mappings	DocTypeCode	{TRNS.DESCR}	Used for archive index in IPM
	PartyID	{TRNS.TRNCUSSTR001}	Used for archive index in IPM
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.jobId	{JOBS.JOB_ID}	Used for OBP Update results
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.recipId	{RCPS.RCP_ID}	Used for OBP Update results
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.setId	{TRNS.TRN_ID}	Used for OBP Update results

Group Name	Property	Value	Purpose
	updateDocument .sessionContext. bankCode	{TRNS.TRNC USSTR002}	Used for OBP Update results
	updateDocument .sessionContext.t ransactionBran ch	{TRNS.TRNC USSTR003}	Used for OBP Update results
	updateDocument .sessionContext. userId	{TRNS.CURR USER}	Used for OBP Update results

8. Create a new Context configure the output Post destination used for output batches who's output is bursted, and zipped along with a print control file. This output will then be independently sent to or picked up by a print vendor. This destination, OBP_Post can be customized to meet the needs of the particular print vendor used.

Note

Context Name	Category	Group Name	Property	Value
DESTINATION	OBP_Post	Configuration	destination.name	oracle.documaker.ec mconnector.ngpcom ponents.NGPPrintDe stination
			destination. ngp.scratch. directory	<i>c:\oracle\odee_1\doc umaker\mstres\dmre s\post\scratch</i> Where the value is dynamic based on your installation location
			destination. ngpprint.ba se.directory	c:\oracle\odee_1\doc umaker\mstres\dmre s\post
			destination. ngpprint.pcf .template.fil e	c:\oracle\odee_1\doc umaker\printcontrolt emplate.xml
			phaselistene r	OBPPDFBurster

Context Name	Category	Group Name	Property	Value
			phaselistener	OBPDispatchResultsWriter
			destination.ngp.file.pattern	<p>(Optional) (\${BCHS.BCH_ID} \${FORMNAME} \${GUID} \${INDEXNO} \${DocID})</p> <p>Description: Naming convention for the bursted PDF file can be a combination of ; static text, column values, and freemarker templating formats. The format to pull from a column: \${BCHS.BCH_ID} to use the Batch ID and this also supports other dmkr_asline table column values.</p> <p>Form Name, use the convention: \${FORMNAME}</p> <p>For GUID, use the convention: \${GUID}</p> <p>For Index Number, use the convention: \${INDEXNO}</p> <p>User Attributes, use the convention: \${UserAttribute}</p> <p>In other words, The user attribute should exactly match the name defined in Studio. For example, to use the DocID as part of the PDF file name use the convention: \${DocID}</p>

Context Name	Category	Group Name	Property	Value
			destination.ngp.pcffile.pattern	<p>(Optional) (<FormName>\${AFORM.formName}</FormName>,<FileName>\${AFORM.fileName}</FileName>)</p> <p>Description: Naming convention for the print control file can be a combination of static text, column values, and freemarker templating formats</p> <p>Note: In the print control file template, use the following to get the form name or the file name as needed to reference the PDF:</p> <p>For a complete list of AFORM. keywords that can be used, see note below.</p>
			destination.ngpprint.zipfile.pattern	<p>(Optional) \${BCHS.BCH_ID}</p> <p>Description: Naming convention for the zip file that includes the bursted PDF files and the print control file. Can be a combination of static text, column values, and reemarker templating formats.</p> <p>\${BCHS.BCH_ID}</p>

Note: AFORM is a collection of the form elements available for reference. The content object and form element are available with the prefix AFORM. are as follows:

- formname
- pullform
- nonStandardPack
- sheetNumOf
- orientation
- paperSize
- paperStockId

- tray
 - userAttributes
 - filename
9. Create a new Group within the Destination – OBP_Post Context to set any default or mapped data that should be sent into the destination processing. This default and mapped data can be used at any point in the destination’s processing – for example, if the destination archive’s to IPM and certain values are needed for indexing, or in the case of the OBP_Post destination, the Default and Mappings are used to capture data for the print control file.

To create a new Group, follow these Steps:

- Highlight the Category for which you want to add a new Group and click + Create Group.
- Enter the Group Name, Property and Value as shown in the first row below.
- Click on the + to Create new property and enter the Property and Value for the remaining properties listed in the table.

Group Name	Property	Value
Defaults	default	

Group Name	Property	Value	Purpose
Mappings	documentSet.recipient.context.bankName	{TRNS.KEY1}	Used for OBP Update results
	updateDocument.sessionContext.bankCode	{TRNS.KEY1}	Used for OBP Update results
	updateDocument.sessionContext.transactionBranch	{TRNS.TRNCUSSTR003}	Used for OBP Update results
	updateDocument.sessionContext.userId	{TRNS.CURRUSER}	Used for OBP Update results
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.jobId	{JOBS.JOB_ID}	Used for OBP Update results
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.recipientId	{RCPS.RCP_ID}	Used for OBP Update results

Group Name	Property	Value	Purpose
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.setId	{TRNS.TRN_ID}	Used for OBP Update results
	BCHS.BCH_ID	{BCHS.BCH_ID}	Used for print control file creation – available variables for template to reference
	BCHS.BCHSTARTTIME	{BCHS.BCHSTARTTIME}	Used for print control file creation – available variables for template to reference
	BCHS.BCHSHEETCOUNT	{BCHS.BCHSHEETCOUNT}	Used for print control file creation – available variables for template to reference
	BCHS.BCHRCPCOUNT	{BCHS.BCHRCPCOUNT}	Used for print control file creation – available variables for template to reference
	BCHS.BCHPRRTTYPE	{BCHS.BCHPRRTTYPE}	Used for print control file creation – available variables for template to reference
	TRNS.KEY2	{TRNS.KEY2}	Used for print control file creation – available variables for template to reference
	RCPS.ADR_POSTALCODE	{RCPS.ADR_POSTALCODE}	Used for print control file creation – available variables for template to reference

Group Name	Property	Value	Purpose
	RCPS.ADR_COUNTRY	{RCPS.ADR_COUNTRY}	Used for print control file creation – available variables for template to reference
	RCPS.ADR_NAME	{RCPS.ADR_NAME}	Used for print control file creation – available variables for template to reference
	RCPS.ADR_CITY	{RCPS.ADR_CITY}	Used for print control file creation – available variables for template to reference
	RCPS.ADR_ADDRESS1	{RCPS.ADR_ADDRESS1}	Used for print control file creation – available variables for template to reference
	RCPS.ADR_ADDRESS2	{RCPS.ADR_ADDRESS2}	Used for print control file creation – available variables for template to reference
	RCPS.ADR_STATE	{RCPS.ADR_STATE}	Used for print control file creation – available variables for template to reference

10. Create a new Context configure the output E-mail destination used for output batches who's output is bursted, zipped, and emailed to the Receiving Party. The E-mail subject and message body are configured and use the Defaults and Mappings values as the source for variable data per implementation and batch, respectively.

Context Name	Category	Group Name	Property	Value
DESTINATION	OBP_Email	Configuration	destination.name	oracle.documaker.ecmconnector.ngpcomponents.NGPEmailDestination
			destination.ngp.scratch.directory	<i>c:\oracle\odee_1\documaker\mstres\dmres\scratch</i>
			destination.ngpemail.from.address	admin@docfactory.com
			destination.ngpemail.mail.host	internal-mail-router.oracle.com
			destination.ngpemail.message.template.file	<i>c:\oracle\odee_1\documaker\OBPEmailtemplate.txt</i>
			destination.ngpemail.subject.text	<code>\${documentSet.recipient.context.bankName}.\${FORMNAMELIST}</code>
			destination.ngpprint.base.directory	where the value is dynamic based on your installation location. <i>c:\oracle\odee_1\documaker\mstres\dmres\post</i>
			phaselistener	OBPDispatchResultsWriter
			phaselistener	OBPPDFBurster

11. Create a new Group within the Destination – OBP_Email Context to set any default or mapped data that should be sent into the destination processing. This default and mapped data can be used at any point in the destination's processing – for example, if the destination archive's to IPM and certain values are needed for indexing, or in the case of the OBP_Post destination, the Default and Mappings are used to capture data for the print control file.

To create a new Group, follow these Steps:

- Highlight the Category for which you want to add a new Group and click + Create Group.
- Enter the Group Name, Property and Value as shown in the first row below.
- Click on the + to Create new property and enter the Property and Value for the remaining properties listed in the table.

Group Name	Property	Value
Defaults	default	
	documentSet.recipient.context.bankName	Model Bank

Group Name	Property	Value	Purpose
Mappings	destination.ngpemail.to.address	{RCPS.ADR_EMAIL}	Used for OBP Update results
	updateDocument.sessionContext.bankCode	{TRNS.TRNCUSSTR002}	Used for OBP Update results
	updateDocument.sessionContext.transactionBranch	{TRNS.TRNCUSSTR003}	Used for OBP Update results
	updateDocument.sessionContext.userId	{TRNS.TRNCUSSTR004}	Used for OBP Update results
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.jobId	{JOBS.JOB_ID}	Used for OBP Update results
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.recipientId	{RCPS.RCP_ID}	Used for OBP Update results

Group Name	Property	Value	Purpose
	updateDocument.outboundDocumentListDTO.documentListRecordDTOs.documentDTO.setId	{TRNS.TRN_ID}	Used for OBP Update results

12. Create a new Context configure the process used to update the results of generation (archive) and dispatch (distribution via OBP_Post or OBP_Email) back to OBP via the OBP Update service. Use the first row to create the new Context and then add the properties listed on the remaining rows.

Context Name	Category	Group Name	Property	Value
DESTINATION	OBPResultsUploader	Configuration	destination.name	oracle.documaker.ecmconnector.mockdestination.MockDestination
			periodic.process.ngpsubmit.username	The user name for the OBP Update Service security setting
			periodic.process.ngpsubmit.password	The password for the OBP Update Service security setting
			periodic.process.ngpsubmit.security.enable	False, Set this to value unless security is enabled for the OBP Update service.

Context Name	Category	Group Name	Property	Value
			periodic.process.collection.instance.class	oracle.documaker.ecmconnector.ngpcomponents.archiveresults.NGPSubmitProcess
			periodic.process.collection.instance.count	1
			periodic.process.ngpsubmit.base.directory	<i>c:\oracle\od ee_1\documaker\mstrres\dmres\results-archive</i>
			periodic.process.ngpsubmit.retry.count	5
			periodic.process.ngpsubmit.retry.wait	30000
			periodic.process.ngpsubmit.type	ARCHIVE
			periodic.process.ngpsubmit.wsdl	<i>http://ipaddress:port/com.ofss.fc.webservice/services/content/DocumentApplicationService?WSDL</i>
			periodic.process.repetition.count	0

Context Name	Category	Group Name	Property	Value
			periodic.process.repetition.wait	2000

Step D: Configure the Debug Settings

1. Add a new Group to the Assembly Line's LOG4J Logger Category:
 - a. On the System Overview tab, Click System.
 - b. Highlight the Assembly Line name, default value is Assembly Line 1.
 - c. Click Configure.
 - d. Expand the LOG4J Logger Context.
 - e. Create a group with the following properties. Use the first row to create the group then add the remaining properties:

Group Name	Property	Value	Active
oracle.documaker.ecmconnector.npcomponents	priority	error	Checked
	additivity	false	Unchecked
	appender-ref	ErrorAppender	Checked
	appender-ref	LogAppender	Checked
	appender-ref	stdout	Checked
	appender-ref	roll	Checked
	class	oracle.documaker.log4jlogger.DFLogger	Checked

Step E: Configure Output Batch

1. Add the new Archiver Destinations to the candidate list for use with a batching definition and update the labels on the Batchings setup tabs within the Documaker Administrator.
 - a. On the System Overview tab, Click System.
 - b. Highlight Assembly Line name, default value is Assembly Line 1.
 - c. Click Translate.

d. Add two new Properties to the BCHINGS.BCHINGARCDEST Group.

ID	Local ID	Display	Description	Display Sequence
OBP_Post	en	OBP_Post	OBP Post Destination	next in sequence
OBP_Email	en	OBP_Email	OBP Email Destination	next in sequence

e. Add one new Property to the BCHINGS.BCHINGSGNDEST Group.

ID	Local ID	Display	Description	Display Sequence
OBP_Archive	en	OBP_Archive	OBP IPM Archive Destination	next in sequence

f. Change the Display value on the BCHINGS.BCHINGARCLBL.

ID	Local ID	Display	Description	Display Sequence
Archive	en	Dispatch-Delivery	Batchings Archive Destination Label	1

g. Change the Display value on the BCHINGS.BCHINGSGNLBL

ID	Local ID	Display	Description	Display Sequence
Sign	en	Archive-Generation	Batchings Sign Destination Label	1

2. Update batching options to support Post and Email distribution options.

- a. Click System.
- b. Highlight Assembly Line name, default value is Assembly Line 1.
- c. Click Batchings.
- d. Inactivate Fax, Batch, SMS and MMS batching definitions.

-
- e. Configure Email batching definition:
 - Confirm the Print Type: PDF and the MIME Type: application/pdf.
 - Set the Dispatch-Delivery destination to: OBP_Email.
 - Set the Archive-Generation destination to: OBP_Archive.
 - Replace RCPS.RCBRCPNAME='Customer_Email' OR RCPS.RCBRCPNAME='Bank_Email' OR RCPS.RCBRCPNAME='Guarantor_Email' in the Rule's Selection Criteria Rule.
 - Uncheck the Publish option.
 - f. Configure Local Print batching definition:
 - Confirm the Print Type: PDF and the MIME Type: application/pdf.
 - Set the Dispatch-Delivery destination to: OBP_Post.
 - Replace RCPS.RCBRCPNAME='Customer' OR RCPS.RCBRCPNAME='Bank' OR RCPS.RCBRCPNAME='Guarantor' in the Rule's Selection Criteria Rule.
 - Set the Archive-Generation destination to: OBP_Archive.

Resource Configuration

1. Make a back-up of the existing mstres\dmres directory.
2. Update fsisys.ini in the documaker\mstres\dmres directory.
 - a. Set the BatchingByRecip values – to be the Model Bank recipients.


```

          < BatchingByRecip >
          Batch_Recip_Def = TRUE;"BATCH1";BANK
          Batch_Recip_Def = TRUE;"BATCH1";CUSTOMER
          Batch_Recip_Def = TRUE;"BATCH1";GUARANTOR
          DefaultBatch = ERROR
          Batch_Recip_Def = TRUE;"BATCH1";BANK_EMAIL
          Batch_Recip_Def = TRUE;"BATCH1";CUSTOMER_EMAIL
          Batch_Recip_Def = TRUE;"BATCH1";GUARANTOR_EMAIL
          
```
 - b. Add the following entry to the DocsetName3 group. If the option is already present, make sure it is not commented out:


```

          GroupName3 = Key3
          
```
 - c. Update the entries in the Key1Table group as shown:


```

          < Key1Table >
          Model Bank = Model Bank
          XML = Model Bank
          
```

d. Update the TRN_FIELDS group as shown:

```
< TRN_FIELDS >
TRNNAME           = !//Recipient/Context/BankerName
KEY1              = !//Recipient/Context/Key1
KEY2              = !//Recipient/Context/Key2
KEY3              = !//Recipient/Context/Key3
KEYID             = !//Recipient/Context/KeyID
TRANCODE         = !//Recipient/Document/TranCode
CURRGROUP        = !//Recipient/Context/UserGroup
DESC             = !//Recipient/Document/NGPDocID
APPROVALSTATE    = !//Recipient/Context/
ApprovalState
ACTION           = !//Recipient/Context/Action
TRNCUSSTR001    = !//Recipient/PartyID
TRNCUSSTR002    = !//Recipient/Context/BankCode
TRNCUSSTR003    = !//Recipient/Context/
TransactionBranch
TRNCUSSTR004    = !//Recipient/Context/UserId
```

e. Set the TRN_FILE group as shown:

```
< TRN_FILE >
BinaryExt        = N
MaxExtRecLen     = 4000
TRNRECFMT       = KEY1, KEY2, KEY3, KEYID
XMLTrnFields    = Yes
```

f. Update the BaseDef option value in the Config:Correspondence group as shown:

```
BaseDef = OBP
```

Note	Leave the Config called Correspondence unless you prefer to change it to your configuration name or to OBP. If so, reference the Documaker Enterprise Administrator's Guide Appendix for a list of items to update.
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g. Set the UserID value in the AFG2WIP group to the entity ID from the ENTITIES table in the dmkr_admin schema that has Drafter permissions in Documaker Interactive. The original user will be listed as this user ID but when the OBP user accesses the document via Documaker Interactive, that user will take ownership and become the CURRUSER for the transaction.

```
< AFG2WIP >
USERID          = 8
```

h. Add a reference to the OBP.dal library in:

```
< DalLibraries >
    CompileWhenLoaded      = No
    LIB = OBP.dal
```

3. Update the afgjob_1.jdt file in the documaker\mstres\dmres\deflib directory by inserting this rule after the RunTriggers rule:

```
;PreTransDAL;;CALL("Locale_Convert");
```

4. Update the afgjob_2.jdt file to:

a. Add a /* in front of the;BatchingByPageCountPerRecipINI;; and;BatchingByRecipINI;2; rules.

b. Add the following after the RcpDocFactory rule:

```
;IfRecipUsed;;BATCH1=Bank;
;IfRecipUsed;;BATCH1=Customer;
;IfRecipUsed;;BATCH1=Guarantor;
;IfRecipUsed;;BATCH1=Bank_Email;
;IfRecipUsed;;BATCH1=Customer_Email;
;IfRecipUsed;;BATCH1=Guarantor_Email;
```

5. Update the deflib\rcbdfdf.dfd and deflib\rcpdocf.dfd files with the copies in the OBP_Update.zip dmres\deflib directory. This will enable the TRAY1-9 fields to be set (If using ODEE 12.1.0, complete this step. Otherwise, skip to next step).
6. Update the deflib\trnsdf.dfd to uncomment the entries for TRNCUSSTR001, TRNCUSSTR002, TRNCUSSTR003, and TRNCUSSTR004.
7. Update the deflib\trndfdfl.dfd and rcbdfdf.dfd to include a reference to KEY3. Enter the following values:

In the field list:

```
FIELDNAME = KEY3
```

In the field definition:

```
< FIELD:KEY3 >
    EXT_LENGTH = 64
    EXT_TYPE   = CHAR_ARRAY
    INT_LENGTH = 64
    INT_TYPE   = CHAR_ARRAY
    KEY = N
    REQUIRED = N
```

8. Make a back up of the master.mdx, master.dbf and master.lby files in the documaker\mstres\dmres\deflib directory.

9. Copy in the master.mdx, master.dbf, and master.lby files from the OBP_Update.zip contents.
10. Using SQL Developer or SQL Plus
 - a. Connect to the dmkr_asline schema.
 - b. Delete the rows of data from these tables:
 - DMRES_LBYD
 - DMRES_LBYC
 - DMRES_LBYI
 - DMRES_LBYL
 - c. Ensure to **Commit** after running the delete commands.
11. From the application tier, run deploysamplemrl.bat or deploysamplemrl.sh to load the Model Bank resources stored in the master.lby, master.mdx and master.dbf files into the DMRES_LBY* tables.
12. If running on Windows, test Documaker Studio connectivity and test scenario setup.
 - a. Delete the current *.jtk and *.rps files from the deflib folder.
 - b. Clear the listing of test scenarios from the correspondence.dxm file - via a text editor.
 - c. Update the deflib\trndfdfl.dfd to include reference to the ; TRNCUSSTR001, TRNCUSSTR002, TRNCUSSTR003, and TRNCUSSTR004.
 - d. Copy the sampleextract.xml from the OBP_Update.zip to the documaker\mstres\dmres\input directory.
 - e. Create a new test scenario in Documaker Studio using the sampleextract.xml and the afgjobids.jdt in the mstres\deflib directory.
 - f. Execute the test scenario.

Note	For assistance in understanding and using test scenarios and Documaker Studio, see the Documaker Studio User Guide.
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13. Restart the ODDF Service and Docupresentation services.
 - a. Check that all processes for ODDF Service and Docupresentation service start successfully.
 - b. Copy the sampleextract.xml file from the documaker\mstres\dmres\input into the hotfolder. Check that the document processes successfully to distribution completion in the Dashboard web application.

Note	You will not be able to create new transactions within Documaker Interactive once these changes are in place as the source for all new documents is extract data from OBP.
-------------	--

c. Validate the web services used to communicate.

- Use the doCallIDS-GetMRLResource.txt contents as the web service validation for the Composition method supported within DWS running under WLS. This request should return a list of the forms contained within the MRL loaded into the dmrk_asline schema.
- Use the doPublishFromImport.txt contents as the web service validation for the Publishing method supported within DWS running under WLS. This request should return the JOB and TRNS table index values where the Status values are 999.

Web Application Configuration

Oracle Documaker Enterprise Edition installs three web applications – Documaker Administrator, Documaker Document Factory Dashboard, and Documaker Interactive. Within a OBP-Documaker Integrated solution, some of the capabilities of Documaker Interactive should be restricted from use. These capabilities primarily include the ability to create new documents, the ability to add additional forms to the document set and the ability to add or modify the recipients or Receiving Party information as all of this information is sourced by OBP and should not be modified externally.

You can configure Documaker Interactive using the Entities and Abilities configuration settings within the Documaker Administrator web application.

To Disable the ability to create new documents:

1. Login to the Documaker Administrator.
2. Select the Entities and Ability Sets tab.
3. Click on the Define Ability Sets option.
4. Highlight the Drafters ability set Name.
5. Click the Pencil icon to edit the Ability Set.

The Edit Ability Set pop-up window appears.

6. Unchecked the Accessible, Editable, and Visible attributes for these rows:
 - a. Edit
 - b. New Document
 - c. Forms pane
 - d. Add attachment pane
 - e. Update Addressees pane

