Oracle Banking Origination Installation Guide Oracle Banking Origination

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1. Preface

1.1 Introduction

This guide helps you to install the Oracle Banking Origination services, User Interface, and Conductor Process flow on designated environments. It is assumed that all the prior setup is already done related with WebLogic installation, WebLogic managed server creation and Oracle DB installation.

It is recommended to use dedicated managed server for each of the Oracle Banking Microservices Architecture services, Oracle Banking Origination Services and Oracle Banking Origination User Interface.

1.2 Audience

This document is intended for WebLogic admin or ops-web team who are responsible for installing the OFSS banking products.

1.3 **Documentation Accessibility**

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

1.4 Organization

This installation user guide would allow you to install the below mentioned Oracle Banking Origination services, UI, process flow in same order. Also mentioned is the list of Common Core services required by Oracle Banking Origination services

Common Core Services

- 1. cmc-account-services
- 2. cmc-additional-attributes-services
- 3. cmc-advice-services
- 4. cmc-base-services
- 5. cmc-branch-services
- 6. cmc-businessoverrides-services
- cmc-checklist-services
- 8. cmc-comments-services
- 9. cmc-currency-services
- 10. cmc-customer-services
- 11. cmc-datasegment-services
- 12. cmc-document-services
- 13. cmc-documentmanagement-services
- 14. cmc-external-chart-account
- 15. cmc-ml-indb-services
- 16. cmc-obcbs-services
- 17. cmc-obrh-service



- 18. cmc-opds-services
- 19. cmc-priority-services
- 20. cmc-processcode-service
- 21. cmc-report-services
- 22. cmc-resource-segment-orchestrator-service
- 23. cmc-screenclass-services
- 24. cmc-sequencegenerator-services
- 25. cmc-sla-services
- 26. cmc-transactioncontroller-services
- 27. cmc-resourceclass-services

Oracle Banking Origination Services

- 1. obremo-rpm-maintenance-services
- 2. obremo-rpm-process-driver-services
- 3. obremo-rpm-businessprocess-services
- 4. obremo-rpm-businessproductdetails-services
- 5. obremo-rpm-cmn-applicantservices
- 6. obremo-rpm-cmn-hostservices
- 7. obremo-rpm-cmn-scorecardservices
- 8. obremo-rpm-lo-loanapplications
- 9. obremo-rpm-sav-account-service
- 10. obremo-rpm-term-deposit-service
- 11. obremo-rpm-projection-services
- 12. obremo-rpm-batch-services
- 13. obremo-rpm-cmn-ipaservices
- 14. obremo-rpm-cmn-collateralservices
- 15. obremo-rpm-creditcardapplication
- 16. obremo-rpm-rule-configurationservice
- 17. obremo-rpm-cmn-mlservice

User Interface

UI war is split into individual component server war files. All the component server war files should be deployed in the same managed server.

For Common Core war files, deploy the war files mentioned below:

- 1. app-shell
- cmc-component-server
- 3. moc-component-server
- 4. sms-component-server

For Domain Specific war files, deploy the individual component server war files mentioned below:

1. oboflo-component-server



Oracle Banking Origination Process Workflow

- 1. CASAHOSTORCH
- 2. CREDITCARD
- 3. CURRENTACCOUNT
- 4. EDUCATIONLOAN
- 5. HOMELOAN
- 6. HOSTORCHESTRATOR
- 7. INITIATION
- 8. INSTCURACC
- 9. INSTSAVACC
- 10. INSTTDACC
- 11. IPA
- 12. PERSONALLOAN
- 13. SAVINGSACCOUNT
- 14. SMBCURRENTACCOUNT
- 15. SMBLOAN
- 16. SMBSAVINGS
- 17. SMBTD1
- 18. SMBTERMLOAN
- 19. TDACCOUNT
- 20. TDHOSTORCH
- 21. VEHICLELOAN

1.5 Related documents

For more information, refer to the following documents:

- Getting Started User Guide
- Oracle Banking Origination Pre-Installation Guide
- ANNEXURE-1



2. Database Setup

2.1 Introduction

In this section you are going to setup database related configuration for Oracle Banking Origination Installation. It is recommended to create different schema for each application. Below setup is designed to work with separate schema for each application.

2.2 Prerequisite

In this section, you are going to setup database related configuration for Oracle Banking Origination Installation. Before you proceed, ensure pre-installation setup is done. The pre-installation setup includes the configuration of database, setting up the setUserOverrides.sh. After creating the schema for each of the required micro services, DDLs and INCs of each micro-service to be compiled in the respective schemas. The DDLs and INCs ensure the creation of tables and availability of static data required for the execution of services. These are compiled automatically using flyway.

2.3 <u>Database Setup</u>

To setup DB for Oracle Banking Origination schema's to be created:

Service Name	Schema Required
obremo-rpm-maintenance-services	Yes (obremo-rpm-maintenance-services schema)
obremo-rpm-process-driver- services	Yes (obremo-rpm-process-driver-services schema
obremo-rpm-businessprocess- services	Yes (obremo-rpm-businessprocess-services schema)
obremo-rpm- businessproductdetails-services	Yes (obremo-rpm-businessproductdetails-services schema)
obremo-rpm-cmn- applicantservices	Yes (obremo-rpm-cmn-applicantservices schema)
obremo-rpm-cmn-hostservices	Yes (obremo-rpm-cmn-hostservices schema)
obremo-rpm-cmn- scorecardservices	Yes (obremo-rpm-cmn-scorecardservices schema)
obremo-rpm-lo-loanapplications	Yes (obremo-rpm-lo-loanapplications schema)
obremo-rpm-sav-account-service	Yes (obremo-rpm-sav-account-service schema)
obremo-rpm-term-deposit-service	Yes (obremo-rpm-term-deposit-service schema)
obremo-rpm-projection-services	Yes (obremo-rpm-projection-services schema)
obremo-rpm-batch-services	No (uses the plato batch server schema)
obremo-rpm-cmn-ipaservices	Yes (obremo-rpm-cmn-ipaservices schema)



Service Name	Schema Required
obremo-rpm-cmn- collateralservices	Yes (obremo-rpm-cmn-collateralservices schema)
obremo-rpm-creditcardapplication	Yes (obremo-rpm-creditcardapplication schema)
obremo-rpm-cmn-mlservice	Yes (obremo-rpm-cmn-mlservice schema)
obremo-rpm-rule- configurationservice	No (Plato rule schema)



3. Oracle Banking Origination Domains Configuration

3.1 Prerequisites

- 1. Machine should have Java JDK to be installed.
- 2. Oracle Fusion Middleware has to be installed on the machine.

NOTE: Before proceeding with below steps complete Oracle Banking Microservices Architecture installation guided.

3. Steps for creating all Oracle Banking Origination domains, properties like port numbers, names will be changing based on the domain. Screenshots provided for such deviations. Domain creation process remains the same.

NOTE: For the exact version to be installed, refer to **Software Prerequisites** section in **License Guide**.

3.2 Oracle Banking Origination Domain Creation

It is recommended to have separate domain for Oracle Banking Origination application.

Service Name	Domain Name
obremo-rpm-maintenance-services	Oracle Banking Origination Domain
obremo-rpm-process-driver-services	Oracle Banking Origination Domain
obremo-rpm-businessprocess-services	Oracle Banking Origination Domain
obremo-rpm-businessproductdetails-services	Oracle Banking Origination Domain
obremo-rpm-cmn-applicantservices	Oracle Banking Origination Domain
obremo-rpm-cmn-hostservices	Oracle Banking Origination Domain
obremo-rpm-cmn-scorecardservices	Oracle Banking Origination Domain
obremo-rpm-lo-loanapplications	Oracle Banking Origination Domain
obremo-rpm-term-deposit-service	Oracle Banking Origination Domain
obremo-rpm-batch-services	Oracle Banking Origination Domain
obremo-rpm-projection-services	Oracle Banking Origination Domain
obremo-rpm-sav-account-service	Oracle Banking Origination Domain
obremo-rpm-cmn-ipaservices	Oracle Banking Origination Domain
obremo-rpm-cmn-collateralservices	Oracle Banking Origination Domain



Service Name	Domain Name
obremo-rpm-creditcardapplication	Oracle Banking Origination Domain
obremo-rpm-cmn-mlservice	Oracle Banking Origination Domain
obremo-rpm-rule-configurationservice	Oracle Banking Origination Domain
app-shell	Appshell Domain
cmc-component-server	Appshell Domain
moc-component-server	Appshell Domain
sms-component-server	Appshell Domain
oboflo-component-server	Appshell Domain

3.3 Steps to Create Domain and Cluster Configuration

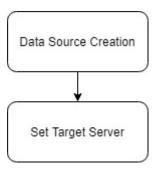
For creating and configuring the domain, refer to the **How to Create Domain and Cluster Configuration** section in **ANNEXURE-1**.



4. Data Sources Creation

4.1 Prerequisite

Database setup for Oracle Banking Origination has to be performed prior to deployment setup. The data sources for the respective micro-services must be created first before the application deployment. Each of the data source target to their corresponding servers on which the application will be deployed. The following sections explain the list of data sources required to be created for Oracle Banking Origination services and the steps to configure them in the server.



4.2 Data Sources List

The table below lists the data sources to be created on each domain prior to deployment of applications onto managed servers.

Service Name	Data Source Name	Data Source JNDI	Targets
obremo-rpm- maintenance- services	RPMMAINTENANCE	jdbc/OBREMOMAI NTCE	Oracle Banking Origination Managed Server
obremo-rpm- process-driver- services	RPMProcessDriver	jdbc/RPMPROCE SSDRIVER	Oracle Banking Origination Managed Server
obremo-rpm- businessprocess- services	RPMBusinessProces s	jdbc/OBREMOBU SSPRC	Oracle Banking Origination Managed Server
obremo-rpm- businessproductdet ails-services	RPMBusinessProduct	jdbc/OBREMOBP DETAILS	Oracle Banking Origination Managed Server
obremo-rpm-cmn- applicantservices	RPMCmnApplicant	jdbc/CMNAPPLIC ANT	Oracle Banking Origination Managed Server
obremo-rpm-cmn- hostservices	RPMHostService	jdbc/RPMHOST	Oracle Banking Origination Managed Server



Service Name	Data Source Name	Data Source JNDI	Targets
obremo-rpm-cmn- scorecardservices	RPMScorecard	jdbc/CMNSCORE CARD	Oracle Banking Origination Managed Server
obremo-rpm-lo- loanapplications	RPMLoan	jdbc/LOANAPP	Oracle Banking Origination Managed Server
obremo-rpm-term- deposit-service	RPMTD	Jdbc/TDACC	Oracle Banking Origination Managed Server
obremo-rpm- projection-services	RPMPROJECTION	jdbc/RPMPROJE CTION	Oracle Banking Origination Managed Server
obremo-rpm-sav- account-service	RPMSaving	jdbc/SAVACC	Oracle Banking Origination Managed Server
obremo-rpm-cmn- ipaservices	RPMIPA	jdbc/IPA	Oracle Banking Origination Managed Server
obremo-rpm-cmn- collateralservices	RPMCOLLATTERAL	jdbc/OBREMOCO LLATERAL	Oracle Banking Origination Managed Server
obremo-rpm- creditcardapplicatio n	RPMCREDITCARD	jdbc/CCAPP	Oracle Banking Origination Managed Server
obremo-rpm-cmn- mlservice	RPMML	jdbc/OBREMOML	Oracle Banking Origination Managed Server, CMC Managed Server
Appshell UI	None	None	Appshell Server
cmc-component- server	None	None	Appshell Server
moc-component- server	None	None	Appshell Server
sms-component- server	None	None	Appshell Server
oboflo-component- server	None	None	Appshell Server



4.3 Steps to Create Datasource

For creating data source, refer to How to Create Datasource section in ANNEXURE-1.

4.4 Additional Datasource Mapping

As part of Oracle Banking Origination, flyway jndi changes are incorporated. In order to deploy the services successfully, map the following data source to all the newly created managed servers for Oracle Banking Origination.

Data source Name	Data Source JNDI	Targets
PLATO	jdbc/PLATO	Oracle Banking Origination Managed Server
PLATO_UI_CONFIG	jdbc/PLATO_UI_CONFIG	Oracle Banking Origination Managed Server
SMS	jdbc/sms	Oracle Banking Origination Managed Server
PLATOBATCH	jdbc/PLATOBATCH	Oracle Banking Origination Managed Server
PLATORULE	jdbc/PLATORULE	Oracle Banking Origination Managed Server
COMMON CORE	jdbc/CMNCORE	Oracle Banking Origination Managed Server

4.5 <u>User Grants</u>

The following grants are provided to the user in the Projection schema which is required for Machine Learning use cases.

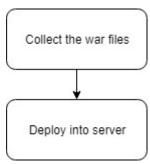
- GRANT CREATE MINING MODEL TO <RPMML SCHEMA>;
- GRANT CREATE ANY MINING MODEL TO <RPMML SCHEMA>;
- GRANT ALTER ANY MINING MODEL TO <RPMML SCHEMA>;
- GRANT DROP ANY MINING MODEL TO <RPMML SCHEMA>;
- GRANT SELECT ANY MINING MODEL TO <RPMML SCHEMA>:
- GRANT COMMENT ANY MINING MODEL TO <RPMML SCHEMA>;
- GRANT EXECUTE ON DBMS_DATA_MINING to <RPMML SCHEMA>;
- GRANT CREATE TABLE TO <RPMML SCHEMA>
- GRANT DROP ANY TABLE TO < RPMML SCHEMA>



5. Deployments

5.1 Prerequisite

The database setup and data sources creation have to be performed prior to the application deployment stage. Each of the services corresponds to a specific war file that needs to be deployed into the server. The following sections explain the list of war files of the Oracle Banking Origination application and the steps to deploy them into the server.



5.2 **Deployments List**

Below table give details of the deployments required on each domain for the Oracle Banking Origination application to run. Deploy one after other in the same given order. The provided archive names are for reference purpose. Refer to the exact archive names available as a part of release.

Application	Archive name	OSDC path	Targets
Maintenance Services	obremo-rpm- maintenance-services- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-maintenance-services	Oracle Banking Origination Managed Server
Process Driver	obremo-rpm-process- driver-services- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-process-driver-services	Oracle Banking Origination Managed Server
Business Process	obremo-rpm- businessprocess- services-{version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-businessprocess- services	Oracle Banking Origination Managed Server
Business Product details	obremo-rpm- businessproductdetails- services-{version}.war	{unzip the file} OFLO_SERVICES\ obremo-rpm- businessproductdetails- services	Oracle Banking Origination Managed Server
Common Applicant	obremo-rpm-cmn- applicantservices- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-cmn-applicantservices	Oracle Banking Origination Managed Server



Application	Archive name	OSDC path	Targets
Host Services	obremo-rpm-cmn- hostservices- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-cmn-hostservices	Oracle Banking Origination Managed Server
ScoreCard	obremo-rpm-cmn- scorecardservices- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-cmn-scorecardservices	Oracle Banking Origination Managed Server
Loan Applicant Services	obremo-rpm-lo- loanapplications- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-lo-loanapplications	Oracle Banking Origination Managed Server
Savings (CASA) Services	obremo-rpm-sav- account-service- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-sav-account-service	Oracle Banking Origination Managed Server
TD Services	obremo-rpm-term- deposit-service- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-term-deposit-service	Oracle Banking Origination Managed Server
Batch Service	obremo-rpm-batch- services-{version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-batch-services	Oracle Banking Origination Managed Server
PROJECTION Service	obremo-rpm-projection- services-{version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-projection-services	Oracle Banking Origination Managed Server
IPA Service	obremo-rpm-cmn- ipaservices-{version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-cmn-ipaservices	Oracle Banking Origination Managed Server
Collateral Service	obremo-rpm-cmn- collateralservices- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-cmn-collateralservices	Oracle Banking Origination Managed Server
Credit Card Service	obremo-rpm- creditcardapplication- {version}.war	{unzip the file} OFLO_SERVICES\obremo- rpm-creditcardapplication	Oracle Banking Origination Managed Server



Application	Archive name	OSDC path	Targets
ML SERVICE	obremo-rpm-cmn- mlservice-{version}.war	{unzip the file} OFLO_SERVICES\ obremo- rpm-cmn-mlservice	Oracle Banking Origination Managed Server
RULE CONFIGURATI ON SERVICE	obremo-rpm-rule- configurationservice- {version}.war	{unzip the file} OFLO_SERVICES\ obremo-rpm-rule- configurationservice	Oracle Banking Origination Managed Server
OBO UI Components	app-shell-{version}.war cmc-component-server- {version}.war moc-component-server- {version}.war sms-component-server- {version}.war oboflo-component- server-{version}.war	{unzip the file} ui/	Appshell Server

NOTE: Refer to OSDC zip for the exact version number for each service.

5.3 Steps to Deploy as Application

To deploy application, refer to **How to Deploy Application** section in **ANNEXURE-1**.



6. Workflow Deployments

6.1 Oracle Banking Origination Processes

Below are the list of Conductor based processes which have to be deployed for the Oracle Banking Origination.

Serial Number	Process Name	Dependent Process
1	CASAHOSTORCH	None
2	CREDITCARD	None
3	CURRENTACCOUNT	None
4	EDUCATIONLOAN	None
5	HOMELOAN	None
6	HOSTORCHESTRATOR	None
7	INITIATION	None
8	INSTCURACC	None
9	INSTSAVACC	None
10	INSTTDACC	None
11	IPA	None
12	PERSONALLOAN	None
13	SAVINGSACCOUNT	None
14	SMBCURRENTACCOUNT	None
15	SMBLOAN	None
16	SMBSAVINGS	None
17	SMBTD1	None
18	SMBTERMLOAN	None
19	TDACCOUNT	None
20	TDHOSTORCH	None
21	VEHICLELOAN	None



6.2 **Updating the process**

Before deploying the process, the following section to be updated with the server ip/port for the end points used in the process.

For each process, open the process to find for "http_request" and modify the following in the uri.

"uri": "http://{{PROCESS SERVER HOST}}:{{PROCESS SERVER PORT}}/

```
{{PROCESS_SERVER_HOST}} - IP of the Plato Orch Service {{PROCESS_SERVER_PORT}} - Port of the Plato Orch Service
```

6.3 Steps to Deploy Conductor Process

6.3.1 Approach 1 - Postman

NOTE: Server names, Domain names need not to be same as this doc provides. Steps to Deploy a process remains the same for all the process files:

- 1. Launch Postman.
- 2. Select POST method
- 3. Input the URL in the below format http://{{PROCESS_SERVER_HOST}}:{{PROCESS_SERVER_PORT}}//plato-orchservice/api/metadata/workflow
- 4. Input the header params as shown below:

```
Content-Type:application/json
userId:<userId>
appld:platoorch
branchCode:000
entityId:DEFAULTENTITY
```

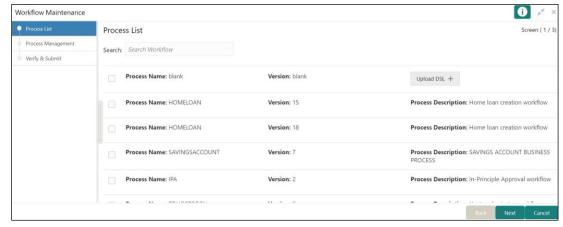


5. Paste the body of the message with the content from the process file.

6. Click **Send**. Response status **200** returned from server.

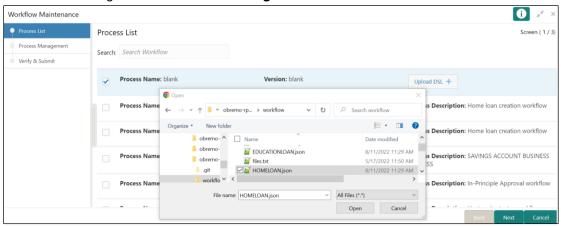
6.3.2 **Approach 2 – UI**

1. Launch the menu Tasks → Business Process Maintenance

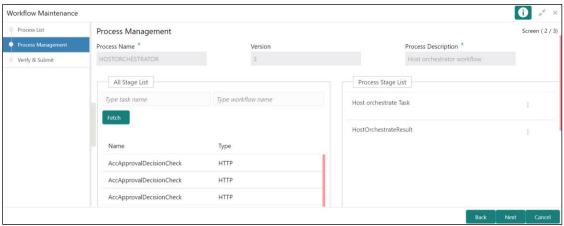




- 2. Click on the "Process Name" check box and upload the required DSL json file.
- 3. Click **Next** to navigate to the **Process Management** screen.



4. Click Next to navigate to the Verify & Submit screen.



5. Click Create Process.





7. Kafka Topics

7.1 Oracle Banking Origination Kafka Topics

Below mentioned are the Kafka topics that are used in Oracle Banking Origination. All the below topics are to be created and verified in the Kafka Server by using the command

<<u>Kafka Bin Folder</u>>/kafka-topics.sh --create --bootstrap-server <<u>Broker</u> <u>ip/hostname</u>>:<<u>Broker Port</u>> --replication-factor 1 --partitions 1 --topic <<u>topic name</u>>

S No	Topic Name	Description	Usage
1	rpmDashboard	This event is used for populating projection data for rendering the dashboard.	Updating all the attributes related to a process
2	InitialFundingA ck	This event is triggered when TD and savings initial funding option is selected as CASH, Oracle Banking Origination triggers a teller transaction Status change of the same transaction will be updated to Oracle Banking Origination asynchronously	Status change occurrence for an Oracle Banking Origination initiated transaction in Teller
3	PartyKYCStat usUpdate	This event is triggered related to when a customer onboarding request is sent to the party module. Party has its own workflow Whenever the KYC verification is completed from party module, notification will be sent to Oracle Banking Origination	KYC status update for the Customer
4	PartyHandoffN otification	This event is triggered related to when a customer onboarding request is sent to the party module. Party has its own workflow. A confirmation message will send from Oracle Banking Origination to the party module to notify that party module can proceed with creation of customer in their product processor	Customer accepts the offer



S No	Topic Name	Description	Usage
5	PartyHandoffT oHostStatus	After creating the customer in the product processor party module will send a message containing the created customer id to Oracle Banking Origination	Customer is created in product processor
6	processTimeP redictionMess age	All services updates the required Machine Learning data into ML service table which will further be used for predicting the time required to complete the process	Machine Learning Table Update



8. Restarts and Refresh

Once everything is deployed, restart all the managed servers. And for each application call path "/refresh" for refreshing the configuration properties.

8.1 Restarting Servers

To restart the server, refer to **How to Restart Servers** section in **ANNEXURE-1**.



9. Logging Area

9.1 Introduction

This part of the document will talk about the logs area where after deployment of Oracle Banking Origination Applications in WebLogic server.

9.1.1 Logging Area

Oracle Banking Origination Application writes logs in the below area of the server-

<WEBLOGIC_DOMAIN_CONFIG_AREA/servers/APP/logs/ APP.out</pre>

Let's assume a domain has been created **oflo_domain** with **managed_server** name called **OFLOAPP** in the following area of the server

- ~/middleware/user_projects/domains/**oflo_domain**". Logging area for Oracle Banking Origination applications would be
- ~/middleware/user_projects/domains/oflo_domain/servers/OFLOAPP/logs/ OFLOAPP.out.



10.Launching Oracle Banking Origination from UBS

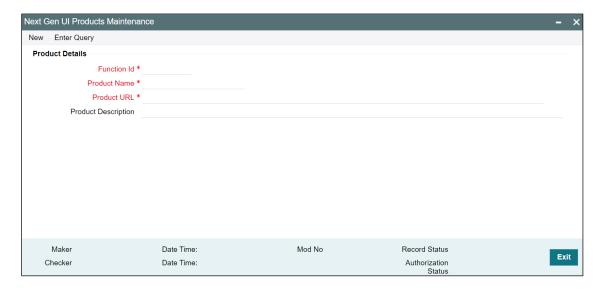
10.1 Introduction

This section provides information on how to setup database related configuration for Oracle Banking Origination Installation.

It is recommended to create different schema for each application. Below setup is designed to work with separate schema for each application.

10.2 Oracle FLEXCUBE Universal Banking Configurations

After Login to FLEXCUBE Universal Banking environment click on Next Generation UI Menu and launch the maintenance screen CSDNGUIM. Ensure that user has roles for the screen. Update the Oracle Banking Microservices Architecture Product URL.



A new Function id NGTELLER is released as Static Data and Ensure user roles has been maintained for the same. Once the roles are maintained Click Next Gen UI on tool bar. Next Gen UI Dashboard will be displayed with the list of products. Click OFLO product, which will Launch Plato Teller Dashboard. Ensure the same user id is maintained in for the Oracle Banking Origination product and it has necessary roles.



10.3 <u>Oracle Banking Microservices Architecture</u> <u>Configurations</u>

SECURITY_CONFIG table in PLATO_SECURITY schema should have the following entries.

Key	Value
INTEGRATION_ENAB	True
INTEGRATION_CALL BACK_URL	https://FCUBShostname:FCUBSport/FCJNeoWeb/ValidationServic e/FCNonceValidation/validate

Please update the Oracle FLEXCUBE Universal Banking hostname and port number in the above URL.



11.OCR Enabled Document Extraction Environment Setup

11.1 Introduction

This section provides information on setting up the environment required for OCR enabled document extraction/verification feature used in Oracle Banking Origination. The details of this feature can be obtained from **Operations User Guide**

11.2 Reference Documents

Below are the references for setting up of this environment.

- Common Core Services Installation Guide → Document Verification Framework
- Oracle Banking Common Core User Guide → Document Verification Framework





Oracle Banking Origination Installation Guide

Oracle Financial Services Software Limited

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