

Oracle® Banking Collections

Installation Guide



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Preface

This guide helps to install the Oracle Banking Collections services on designated environment.

This guide facilitates you to install the following services in the specified sequence:

1. OBCR-ACTION-SERVICES
2. OBCR-ACTIVITY-SERVICES
3. OBCR-COMMON-SERVICES
4. OBCR-CORRESPONDENCE-SERVICES
5. OBCR-ENTITY-SERVICES
6. OBCR-NOTES-SERVICES
7. OBCR-PTP-SERVICES
8. OBCR-SEGMENTATION-SERVICES
9. OBCR-SEGMENT-MAINT-SERVICES
10. OBCR-STRATEGY-MAINT-SERVICES
11. OBCR-STRATEGY-SERVICES
12. OBCR-TASK-MAINT-SERVICES
13. OBCR-TASK-SERVICES
14. OBCR-USER-MANAGEMENT-SERVICES
15. OBCR-DASHBOARD-SERVICES
16. OBCR-FEES-CHARGES-SERVICES
17. OBCR-VENDOR-MANAGEMENT-SERVICES
18. OBCR-DATA-EXCHANGE-SERVICES
19. OBCR-SETTLEMENT-SERVICES



Note:

For the exact version to be installed, see section **System Requirements and Technology Stack** of *Oracle Banking Collections Release Notes*.

User Interface

Follow the below steps to migrate from existing app-shell build to Foundation app-shell. The 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 app-shell and components server, deploy the war files mentioned below:

- app-shell
- cmc-component-server
- moc-component-server
- sms-component-server

For Domain Specific component server, deploy the following war file:

- obcr-component-server

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Purpose

This guide helps to install the Oracle Banking Collections services on designated environment. This guide helps the user to perform the initial setup for Oracle Banking Collections application. The procedures given in this document must be completed to run the application successfully.

Audience

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

Documentation Accessibility

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Bulletins. All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these related Oracle resources:

- *Oracle Banking Collections Initial Setup Guide*
- *Oracle Banking Collections Pre-Installation Guide*

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.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

Acronyms and Abbreviations

The list of the acronyms and abbreviations that are used in this guide are as follows:

Table 1 Acronyms and Abbreviations

Abbreviation	Description
DDA	Demand Deposit Accounts
ECA	External Credit Approval
EOD	End of Day
IBAN	International Bank Account Number

Basic Actions

The basic actions performed in the screens are as follows:

Table 2 Basic Actions

Actions	Description
New	Click New to add a new record. The system displays a new record to specify the required data. The fields marked with asterisk are mandatory. This button is displayed only for the records that are already created.
Save	Click Save to save the details entered or selected in the screen.
Unlock	Click Unlock to update the details of an existing record. The system displays an existing record in editable mode. This button is displayed only for the records that are already created.
Authorize	Click Authorize to authorize the record created. A maker of the screen is not allowed to authorize the same. Only a checker can authorize a record. This button is displayed only for the already created records. For more information on the process, refer Authorization Process.
Approve	Click Approve to approve the initiated record. This button is displayed once the user click Authorize.
Audit	Click Audit to view the maker details, checker details of the particular record. This button is displayed only for the records that are already created.
Close	Click Close to close a record. This action is available only when a record is created.
Confirm	Click Confirm to confirm the action performed.
Cancel	Click Cancel to cancel the action performed.
Compare	Click Compare to view the comparison through the field values of old record and the current record. This button is displayed in the widget once the user click Authorize.
View	Click View to view the details in a particular modification stage. This button is displayed in the widget once the user click Authorize.
View Difference only	Click View Difference only to view a comparison through the field element values of old record and the current record, which has undergone changes. This button is displayed once the user click Compare.
Expand All	Click Expand All to expand and view all the details in the sections. This button is displayed once the user click Compare.
Collapse All	Click Collapse All to hide the details in the sections. This button is displayed once the user click Compare.
OK	Click OK to confirm the details in the screen.

Symbols and Icons

This guide has the following list of symbols and icons.

Table 3 Symbols and Icons - Common

Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Click this icon to add a new row.

Table 3 (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Click this icon to delete a row, which is already added.
	Calendar
	Alerts

Table 4 Symbols and Icons – Audit Details

Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status
	Rejected status

Table 5 Symbols and Icons - Widget

Symbol/Icon	Function
	Open status
	Unauthorized status
	Closed status

Table 5 (Cont.) Symbols and Icons - Widget

Symbol/Icon	Function
	Authorized status
	Rejected status
	Modification Number

1

Database Setup

This topic describes the database setup for Oracle Banking Collections installation.

It is recommended to create a different schema for each application. The below setup is designed to work with the separate schema for each application.

Prerequisites

Before proceeding with the below setup, make sure that the required schemas are provided.

2

Product Installation Using Installer

This topic describes the information for Oracle Banking Collections installation using Installer.

Prerequisites

Before proceeding with the installation setup, make sure that the database installation is completed and the required schemas are created.

Installer Path

You can download the installer from [Oracle Software Delivery Cloud \(OSDC\)](#). The following table provides the download path of the installer.

Table 2-1 Installer Path

Application	Archive Name	OSDC Path
OBMA Installer	obma.zip	INSTALLER/
OBC Installer	obc.zip	INSTALLER/



Note:

To install OBMA foundation using Installer, refer to *Oracle Banking Microservices Architecture Installer Guide*. To install Oracle Banking Collections product using Installer, refer to the below steps.

- [Product Setup](#)

2.1 Product Setup

Please perform the steps mentioned in chapter **Download and Setup Installer** of *Oracle Banking Microservices Architecture Installer Guide*. Post completion of Download and Setup Installer tasks for VM identified for Product Setup, perform the below mentioned configurations.

This topic consists of following sections:

- [Update Properties File](#)
- [Update Roles File](#)
- [Execute Installer Script](#)

2.1.1 Update Properties File

To update properties file:

1. Navigate to the path `/scratch/obma_installer/chef-repo/`.

2. Open the respective product properties file. Here, we will update `obcr_properties.rb` with details as explained in further steps.
3. Update the local user and its group.

Figure 2-1 Update Local User and Group

```
#Standard Values
INSTALL_USER = "obedmqa"
INSTALL_GROUP = "dba"
USER_ROOT = "root"
GROUP_ROOT = "root"
INSTALL_BASE_DIR = "/scratch"
EXTRACT_LOC = "/scratch/extract"
```

4. Verify the version of java, update if required, and ensure the same version is available in the software's directory.

Figure 2-2 Verify Java Version

```
#Java Installation Details
JAVA_INSTALLER_SOURCE = "filesystem"
JAVA_INSTALLER_PATH = "/java/"
JAVA_INSTALLATION_DIR = INSTALL_BASE_DIR + "/obma"
JAVA_VERSION = "17.0"
JDK_INSTALLER_VERSION = "17.0.12"
JDK_INSTALLER_FILE = "jdk-17.0.12_linux-x64_bin.tar.gz"
CERTS_DIRNAME = INSTALL_BASE_DIR + "/ssl/cacerts"
```

5. Verify the version of weblogic server, update if required, and ensure the same version is available in the software's directory.

Figure 2-3 Verify Weblogic Server Version

```
#Weblogic Infra Installation Details
ORACLE_INVENTORY = "/scratch/app/oraInventory"
WLS_VERSION = "14.1.2"
WLS_INSTALLER_SOURCE = "filesystem"
WLS_INSTALLER_PATH = "/wls/"
WLS_PACKAGE_BASENAME = "fmw_14.1.2.0.0_wls_generic.jar"
WLS_INSTALLER_FILE = "fmw_14.1.2.0.0_wls_Disk1_lofl.zip"
WLS_INSTALL_DIR = INSTALL_BASE_DIR + "/obma/fmw"
WLS_INSTALLER_TYPE = 'WebLogic Server'
```

6. Update the OBMA Foundation host name and verify various ports, and update if required.

Figure 2-4 Update OBMA Foundation Host Name and Verify Ports

```
#Product specific parameters
PROTOCOL = "https"
PLATO_HOST = "ofss-mum-xxx.snbomprshared.gbucdsintbom.oraclevcn.com"
PLATO_CONFIG_PORT = "8002"
DISCOVERY_PORT = "8004"
API_GATEWAY_PORT = "8006"
SMS_PORT = "8026"
```

- For Oracle Banking Collections, the default servers and their ports are already defined. Any new addition of server or data source details needs to be appended here under “**OBC Flyway Placeholder Details**”.

 Note:

Snapshot of Oracle Banking Collections Configuration Details is given for reference.

Figure 2-5 Flyway Placeholder

```
*****
#
#-----
# OBC FLYWAY PLACEHOLDER DETAILS
#-----
#
# OBCR Server Ports Details
OBCR1_MAN_SERVER_LISTEN_PORT = "8501"
OBCR1_MAN_SERVER_SSL_PORT = "8502"
OBCR2_MAN_SERVER_LISTEN_PORT = "8503"
OBCR2_MAN_SERVER_SSL_PORT = "8504"

#OBCR CR_ACTIVITY Datasource Details
CR_ACTIVITY_SCHEMA = "CR_ACTIVITY"
CR_ACTIVITY_JNDI = "jdbc/CR_ACTIVITY"
CR_ACTIVITY_DS_TARGET = "obcr_cluster1,obcr_cluster2"

#OBCR CR_ACTION Datasource Details
CR_ACTION_SCHEMA = "CR_ACTION"
CR_ACTION_JNDI = "jdbc/CR_ACTION"
CR_ACTION_DS_TARGET = "obcr_cluster1"

#OBCR CR_CMN Datasource Details
CR_CMN_SCHEMA = "CR_CMN"
CR_CMN_JNDI = "jdbc/CR_CMN"
CR_CMN_DS_TARGET = "obcr_cluster1"

#OBCR CR_ENTITY Datasource Details
CR_ENTITY_SCHEMA = "CR_ENTITY"
CR_ENTITY_JNDI = "jdbc/CR_ENTITY"
CR_ENTITY_DS_TARGET = "obcr_cluster1"
```

 Note:

The password for all the default schema's is "welcome1". In case, there is change in the password for the schemas, user needs to update the same in databag. For more information, see section [Password Update in Databag](#) of *Oracle Banking Microservices Architecture Installer Guide*.

8. Update the database details under “#Database details for weblogic datasource configuration”.

Figure 2-6 Update Database Details

```
#DB TNS details for weblogic datasource configuration
ORACLE_PDB_SID = "PDBXXXXA"
ORACLE_PDB_HOSTNAME = "ofss-mum-xxxx.snbmprshared.gbucdsintbom.oraclevcn.com"
ORACLE_PDB_PORT = "XXXX"
ORACLE_DRIVER = "oracle.jdbc.driver.OracleDriver"
```

2.1.2 Update Roles File

To update roles file:

1. Navigate to the path /scratch/obma_installer/chef-repo/roles/ and open the OBC role file. Here, we will consider obcr_mw.rb for reference.
2. In case of addition or changes to the existing cluster configuration, modify the same under “cluster_config”.

Figure 2-7 Modify Cluster Configuration

```
plato_service_logging_path: APPLICATION_LOGGING_PATH,
plato_service_env: APPLICATION_ENVIRONMENT,
cluster_configure: CONFIGURE_WLS_CLUSTER,
is_node_primary: "true",
cluster_config: {
  obcr_cluster1: {
    managed_servers: {
      obcr_server1: {
        listen_port: OBCR1_MAN_SERVER_LISTEN_PORT,
        ssl_port: OBCR1_MAN_SERVER_SSL_PORT,
        java_memory_min: "6144",
        java_memory_max: "8192",
      }
    }
  },
  obcr_cluster2: {
    managed_servers: {
      obcr_server2: {
        listen_port: OBCR2_MAN_SERVER_LISTEN_PORT,
        ssl_port: OBCR2_MAN_SERVER_SSL_PORT,
        java_memory_min: "6144",
        java_memory_max: "8192",
      }
    }
  }
}
```

3. In case of addition or changes to the existing data source configuration, modify the same under "datasource_config".

Figure 2-8 Modify Datasource Configuration

```
datasource configure: "true",
datasource_config: {
  PLATO: {
    database_name: ORACLE_PDB_SID,
    driver_class: "oracle.jdbc.OracleDriver",
    jndi_name: PLATO_JNDI,
    host_name: ORACLE_PDB_HOSTNAME,
    port: ORACLE_PDB_PORT,
    global_transaction_protocol: "OnePhaseCommit",
    database_user_name: PLATO_SCHEMA,
    target: OBCR_PLATO_DS_TARGET
  },
  PLATOBATCH: {
    database_name: ORACLE_PDB_SID,
    driver_class: "oracle.jdbc.OracleDriver",
    jndi_name: PLATO_BATCH_JNDI,
    host_name: ORACLE_PDB_HOSTNAME,
    port: ORACLE_PDB_PORT,
    global_transaction_protocol: "OnePhaseCommit",
    database_user_name: PLATO_BATCH_SCHEMA,
    target: OBCR_PLATO_BATCH_DS_TARGET
  },
  PLATORULE: {
    database_name: ORACLE_PDB_SID,
    driver_class: "oracle.jdbc.OracleDriver",
    jndi_name: PLATO_RULE_JNDI,
    host_name: ORACLE_PDB_HOSTNAME,
    port: ORACLE_PDB_PORT,
    global_transaction_protocol: "OnePhaseCommit",
    database_user_name: PLATO_RULE_SCHEMA,
    target: OBCR_PLATO_RULE_DS_TARGET
  },
}
```

4. In case of addition or changes to the existing services or war files, modify the same under "app_deployment".

Figure 2-9 Modify Wars in App Deployment

```

app_deployment: {
  app1: {
    app_file_path: "/obma_installer/deployables/apps/obcr",
    app_file_name: "obcr-activity-services-9.6.0.war",
    app_target_name: "obcr_cluster1"
  },
  app2: {
    app_file_path: "/obma_installer/deployables/apps/obcr",
    app_file_name: "obcr-action-services-9.6.0.war",
    app_target_name: "obcr_cluster1"
  },
  app3: {
    app_file_path: "/obma_installer/deployables/apps/obcr",
    app_file_name: "obcr-common-services-9.6.0.war",
    app_target_name: "obcr_cluster1"
  },
  app4: {
    app_file_path: "/obma_installer/deployables/apps/obcr",
    app_file_name: "obcr-entity-services-9.6.0.war",
    app_target_name: "obcr_cluster1"
  },
  app5: {
    app_file_path: "/obma_installer/deployables/apps/obcr",
    app_file_name: "obcr-ptp-services-9.6.0.war",
    app_target_name: "obcr_cluster1"
  },
  app6: {
    app_file_path: "/obma_installer/deployables/apps/obcr",
    app_file_name: "obcr-segmentation-services-9.6.0.war",
    app_target_name: "obcr_cluster1"
  },
}

```

5. Navigate to the bottom of the file and verify the recipes to be executed. All the listed recipes will be executed in sequential order as shown below.

- CASE 1: If both foundation and product are on same VM, use the below runlist.

```

run_list
['recipe[obma_weblogic::domain]', 'recipe[obma_weblogic::startadmin]', 'recipe[obma_weblogic::startnm]', 'recipe[obma_weblogic::ssl_admin]', 'recipe[obma_weblogic::stopadmin]', 'recipe[obma_weblogic::ssl_nodemanager]', 'recipe[obma_weblogic::restartadmin]', 'recipe[obma_weblogic::cluster]', 'recipe[obma_weblogic::addjdbcconnections_obcr]', 'recipe[obma_weblogic::setuseroverridesupdate]', 'recipe[obma_weblogic::startman]', 'recipe[obma_weblogic::deployapp]']

```

- CASE 2: If foundation and product are on separate VMs, perform the below steps.

- a. Execute the below runlist.

```

run_list
['recipe[obma_java::_install_java]', 'recipe[obma_java::create_certs]', 'recipe[obma_weblogic::install_wls]', 'recipe[obma_weblogic::install_wls_patch]', 'recipe[obma_weblogic::domain]', 'recipe[obma_weblogic::startadmin]', 'recipe[obma_weblogic::startnm]', 'recipe[obma_weblogic::ssl_admin]', 'recipe[obma_weblogic::stopadmin]', 'recipe[obma_weblogic::ssl_nodemanager]', 'recipe[obma_weblogic::restartadmin]', 'recipe[obma_weblogic::cluster]', 'recipe[obma_weblogic::addjdbcconnections_obcr]', 'recipe[obma_weblogic::setuseroverridesupdate]', 'recipe[obma_weblogic::startman]']

```

- b. Perform steps mentioned in section [Certificate Sync Up between Foundation and Product VMs](#) of *Oracle Banking Microservices Architecture Installer Guide*.

- c. Execute below runlist.

```
run_list ['recipe[obma_weblogic::deployapp]']
```

2.1.3 Execute Installer Script

Perform the following steps for silent installation of Oracle Banking Collections:

1. Launch putty and login to product VM with NIS user and then switch to root user.
2. Navigate to the chef-repo path by executing the below command:

```
cd /scratch/obma_installer/chef-repo
```

3. Execute the installer script by executing the below command:

```
./obcr_installer.sh
```

3

Data Source Verification

This topic describes the data source verification for Oracle Banking Collections installation.

Prerequisites

Before proceeding with deployment setup, make sure that the database and application setup for Oracle Banking Microservices Architecture is done.

Data Sources List

The table below lists the data sources created as a part of product installation.

Table 3-1 Data Sources List

Serial Number	Data Source Name	Data Source JNDI	Targets
1	PLATO	jdbc/PLATO	obcr_server1
	PLATOBATCH	jdbc/PLATOBATCH	obcr_server1
	PLATOFEED	jdbc/PLATOFEED	obcr_server1
	PLATO_UI	jdbc/PLATO_UI_CONFIG	obcr_server1
	SMS	jdbc/sms	obcr_server1
	PLATORULE	jdbc/PLATORULE	obcr_server1
	PLATOSEC	jdbc/PLATOSECURITY	obcr_server1
	CMNCORE	jdbc/CMNCORE	obcr_server1
	PLATOFDT	jdbc/PLATOFDT	obcr_server1
	CR_ACTION	jdbc/CR_ACTION	obcr_server1
	CR_ACTIVITY	jdbc/CR_ACTIVITY	obcr_server1
	CR_TASK	jdbc/CR_TASK	obcr_server1
	CR_CMN	jdbc/CR_CMN	obcr_server1
	CR_CORR	jdbc/CR_CORR	obcr_server1
	CR_ENTITY	jdbc/CR_ENTITY	obcr_server1
	CR_NOTES	jdbc/CR_NOTES	obcr_server1
	CR_PTP	jdbc/CR_PTP	obcr_server1
	CR_SEG	dbc/CR_SEG	obcr_server1
	CR_FEECHRG	jdbc/CR_FEECHRG	obcr_server1
	CR_DATAEXCHNG	jdbc/ CR_DATAEXCHNG	obcr_server1
	CR_SETLMNT	jdbc/CR_SETLMNT	obcr_server1
2	PLATO	jdbc/PLATO	obcr_server2
	PLATOFDT	jdbc/PLATOFDT	obcr_server2
	PLATOBATCH	jdbc/PLATOBATCH	obcr_server2
	PLATOFEED	jdbc/PLATOFEED	obcr_server2
	PLATO_UI	jdbc/PLATO_UI_CONFIG	obcr_server2
	SMS	jdbc/sms	obcr_server2
	PLATORULE	jdbc/PLATORULE	obcr_server2

Table 3-1 (Cont.) Data Sources List

Serial Number	Data Source Name	Data Source JNDI	Targets
	PLATOSEC	jdbc/PLATOSECURITY	obcr_server2
	CMNCORE	jdbc/CMNCORE	obcr_server2
	CR_SEGMAINT	jdbc/CR_SEGMAINT	obcr_server2
	CR_ACTIVITY	jdbc/CR_ACTIVITY	obcr_server2
	CR_STRTGY	jdbc/CR_STRTGY	obcr_server2
	CR_STRTGYMAINT	jdbc/CR_STRTGYMAINT	obcr_server2
	CR_TASK	jdbc/CR_TASK	obcr_server2
	CR_TASKMAINT	jdbc/CR_TASKMAINT	obcr_server2
	CR_USERMGMT	jdbc/CR_USERMGMT	obcr_server2
	CR_DASHBOARD	jdbc/ CR_DASHBOARD	obcr_server2
	CR_VNDRMGMT	jdbc/ CR_VNDRMGMT	obcr_server2

**Note:**

For creating data source, see section [Create Datasource](#) of *Configuration and Deployment Guide*.

4

Deployments Verification

This topic describes the deployments for Oracle Banking Collections installation.

Prerequisites

- Before proceeding with the below setup, make sure that Kafka is configured and the related properties are present in PLATO schema. See section "**Oracle Banking Microservices Architecture Installer Guide**" for information on setting up the Kafka Cluster in '10.2'.
- To avail feature of record level approval functionality in Plato-Feed, the below property would need to be maintained as part of weblogic VM argument by each product domain including plato. If not maintained, the default behavior will be of file level approval only.
Property name - feed.recordLevelApprovalReqd

Property value - true or false

Default value - false

Deployments List

The below table gives details of the deployments required on each domain to run the Oracle Banking Collections application. It also provides path where application war files are located at [Oracle Software Delivery Cloud \(OSDC\)](#).



Note:

For the exact version of the archive name, refer to the OSDC file available as part of the release.

Table 4-1 Deployments List

Application	Archive Name	OSDC Path	Targets
Activity Services	obcr-activity-services-{version}.war	OBCR_SERVICES/	OBCR Server1
Action Services	obcr-action-services-{version}.war	OBCR_SERVICES/	OBCR Server1
Common Services	obcr-common-services-{version}.war	OBCR_SERVICES/	OBCR Server1
Entity Services	obcr-entity-services-{version}.war	OBCR_SERVICES/	OBCR Server1
PTP Services	obcr-ptp-services-{version}.war	OBCR_SERVICES/	OBCR Server1
Segmentation Services	obcr-segmentation-services-{version}.war	OBCR_SERVICES/	OBCR Server1
Correspondence Services	obcr-correspondence-services-{version}.war	OBCR_SERVICES/	OBCR Server1

Table 4-1 (Cont.) Deployments List

Application	Archive Name	OSDC Path	Targets
Segment Maintenance Services	obcr-segment-maint-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Strategy Services	obcr-strategy-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Strategy Maintenance Services	obcr-strategy-maint-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Task Services	obcr-task-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Task Maintenance Services	obcr-task-maint-services-{version}.war	OBCR_SERVICES/	OBCR Server2
User Management Services	obcr-user-management-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Notes Services	obcr-notes-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Dashboard Services	obcr-dashboard-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Fees Charges Services	obcr-fees-charges-services-{version}.war	OBCR_SERVICES/	OBCR Server1
Vendor Management	obcr-vendor-management-services-{version}.war	OBCR_SERVICES/	OBCR Server2
Data Exchange service	obcr-data-exchange-services{version}.war	OBCR_SERVICES/	OBCR Server1
Settlement services	obcr-settlement-services	OBCR_SERVICES/	OBCR Server1
UI	• app-shell-{version}.war • cmc-component-server-{version}.war • sms-component-server-{version}.war • obcr-component-server-{version}.war	UI /	API Gateway Server

5

Initial Setup

This topic describes the initial setup for Oracle Banking Collections installation.

Once everything is deployed, run the CMC and SMS initial setup scripts from the below mentioned paths at [Oracle Software Delivery Cloud](#) to create the required maintenances.

- OBCR_INITIAL_SETUP/cmc_initial_setup.sql
To be compiled in Common Core schema.
- OBCR_INITIAL_SETUP/obcr_role_creation.sql
To be compiled in SMS schema for Collections specific admin role creation.
- OBCR_INITIAL_SETUP/sms_initial_setup.sql
To be compiled in SMS schema.
- OBCR_INITIAL_SETUP/obma_role_seed.sql
To be compiled in SMS schema.
- OBCR_INITIAL_SETUP/obcr_role.sql
To be compiled in SMS schema.
- OBCR_INITIAL_SETUP/ plato_properties_script.sql
To be compiled in PLATO schema.
- OBCR_INITIAL_SETUP/ dms_properties_script.sql
To be compiled in PLATO schema.
- OBCR_INITIAL_SETUP/ platofeed_script.sql
To be compiled in PLATOFEED schema.
- OBCR_INITIAL_SETUP/ obcr_field_collector_role.sql
To be compiled in SMS schema for Collections specific field agent role creation.

CMC Initial Setup

This script would prompt a user to enter the below values.

Table 5-1 CMC Initial Setup - Field Description

Serial Number	Field	Description
1	Bank Code	A four-letter Bank Code.
2	Bank Description	Description of the Bank Code.
3	Branch Code	A three letter Branch Code.
4	Branch Name	Name of the Branch.
5	Branch Address Line 1	Address line 1 of the branch.
6	Branch Address Line 2	Address line 2 of the branch.
7	Branch Address Line 3	Address line 3 of the branch.
8	Branch Currency	A three letter ISO Currency Code.
9	Branch Currency Description	The description of the branch currency.
10	Country Code	A two letter ISO Country Code.

Table 5-1 (Cont.) CMC Initial Setup - Field Description

Serial Number	Field	Description
11	Walk-In Customer	Walk-in customer number.
12	Host Code	Host code of the Branch.
13	Host Description	Host code description.
14	Host Process Time Zone	Host code time zone (GMT+5.30).
15	Source System	External source system.
16	Source System Description	Source system description.
17	Source System Branch	Branch code as in the source system.
18	Previous Working Day	Previous working day of the Branch.
19	Current Working Day	Current working day of the Branch.
20	Next Working Day	Next working day of the Branch.

OBC Role Creation

The script would create an OBC specific admin role COLL_MNGR_ROLE.

SMS Initial Setup

This script would prompt the user to create two admin users.

Table 5-2 SMS Initial Setup - Field Description

Serial Number	Field	Description
1	User Login ID 1	Login ID of the first User.
2	User Name 1	Name of the first User.
3	User Login ID 2	Login ID of the second User.
4	User Name 2	Name of the second User.
5	Users Home Branch Code	A three letter Home-Branch Code of the users.
6	Users Locale	Users locale (2 letter ISO country code).
7	Start Date	Start date
8	End Date	End date

These users are assigned the default COLL_MNGR_ROLE, and the PLATO, SMS, CMC and the other functional activities are mapped.

PLATO Additional Setup

This script would prompt the user for the following details regarding correspondence.

Table 5-3 PLATO Additional Setup - Field Description

Serial Number	Field	Description
1	Sender email Id	Email Id of the sender for communication.
2	Branch Code	A three letter Branch Code.

Table 5-3 (Cont.) PLATO Additional Setup - Field Description

Serial Number	Field	Description
3	User ID	Admin User ID.

DMS server Setup

This script would prompt the user for the following details regarding correspondence. These scripts are to be run only if you are using DMS server of document upload. This script is to be executed only if the values for these fields are not already present/updated in the database.

Table 5-4 DMS server Setup - Field Description

Serial Number	Field	Description
1	Dms Service URL	URL of the document management server.
2	Dms Service Username	Login Id of the document management server.
3	Dms Service Password	Password of the document management server.

PLATOFEED Additional Setup

This script would prompt the user for the following details regarding plato feed.

Table 5-5 SMS Initial Setup - Field Description

Serial Number	Field	Description
1	Branch code	A three letter Branch Code

Fact Creation

For creating facts, download the `obcr_facts.csv` file from this path:

`OBCR_INITIAL_SETUP/obcr_facts.csv` at [Oracle Software Delivery Cloud](#). The `obcr_facts.csv` file contains the list of facts that are used to configure rules in the system.

To create facts:

1. From the main menu in the **Oracle Banking Collections application**, navigate to **Rule** and then click **Fact**.
2. From the **Fact** menu, click **Create Fact**.
3. Click **Bulk Upload**.
4. Click **Drag and Drop** to browse to the required folder and select the `obcr_facts.csv` for upload.
5. Click **Upload**.

The `obcr_facts.csv` file contains the list of facts as mentioned below.

Table 5-6 List of Facts for Oracle Banking Collections

Code	Description	Product Processor	Type
AccountOpeningORInitialDisbursementDate	Account Opening Date	OBCR	DATE
AccountWriteOffAmount	Account Write Off Amount	OBCR	NUMBER
AccountWriteOffDate	Account Write Off Date	OBCR	DATE
AccrualStatus	Accrual Status	OBCR	TEXT
AddressCountry	Country Code	OBCR	TEXT
AddressState	State Code	OBCR	TEXT
ApplicationScore	Application Score	OBCR	TEXT
AssetClassificationCode	Asset Classification Code	OBCR	TEXT
AvailableForDisbursement	Available For Disbursement	OBCR	TEXT
BICOEFlag	BICOE Flag	OBCR	TEXT
BehaviourScore	Behavior Score	OBCR	NUMBER
BusinessDate	Business Date	OBCR	DATE
CaseID	Case Id	OBCR	Case Id
ChargeOffAmount	ChargeOff Amount	OBCR	NUMBER
CollateralType	Collateral Type	OBCR	TEXT
CollectionStatus	Collection Status	OBCR	TEXT
CustomerRiskScore	Customer Risk Score	OBCR	NUMBER
DaysChargeOff	Days Charge Off	OBCR	NUMBER
DaysPastDue	Days Past Due	OBCR	NUMBER
DaysSinceAccountLinkagetoCase	Days Since Account Linkage to Case	OBCR	NUMBER
DaysSinceCaseCreation	Days Since Case Creation	OBCR	NUMBER
DelinquencyStartDate	Delinquency Start Date	OBCR	DATE
DisbursedAmount	Disbursed Amount	OBCR	NUMBER
ExistPromiseCount	Existing Promise Amount	OBCR	NUMBER
ForcedAccountSwitch	Forced Account Flag	OBCR	TEXT
HomeBranchCode	Home Branch Code	OBCR	TEXT
InsuredSwitch	Insured Switch	OBCR	TEXT
InterestRate	Interest Rate	OBCR	NUMBER
LastPaymentAmount	Last Payment Amount	OBCR	NUMBER
LastPaymentDate	Last Payment Date	OBCR	DATE
LoanMaturityORLimitExpiryDate	Loan Maturity OR Limit Expiry Date	OBCR	DATE
MaxPTPInstallCount	Max PTP Instalment Count	OBCR	NUMBER
NewPromiseCount	New Promise Count	OBCR	NUMBER
OutstandingAmount	Outstanding Amount	OBCR	NUMBER
OverdueAmount	Overdue Amount	OBCR	NUMBER
PartyType	Party Type	OBCR	TEXT

Table 5-6 (Cont.) List of Facts for Oracle Banking Collections

Code	Description	Product Processor	Type
ProductProcessorCd	Product Processor Code	OBCR	TEXT
ProductSubType	Product Sub Type	OBCR	TEXT
ProductType	Product Type	OBCR	TEXT
PromiseAmount	Promise Amount	OBCR	NUMBER
PromiseDate	Promise Date	OBCR	DATE
SecuredSwitch	Secured Switch	OBCR	TEXT
Segmen	Segment Code	OBCR	TEXT
SystemAccountStatus	System Account Status	OBCR	TEXT
TotalCollateralAssessedValue	Total Collateral Assessed Value	OBCR	NUMBER
UnClearedPaymentAmount	UnCleared Payment Amount	OBCR	NUMBER
UserDefinedAccountStatus	User Defined Account Status	OBCR	TEXT
VIPFlag	VIP Flag	OBCR	TEXT
Legal	Legal Collection Status	OBCR	BOOLEAN
Bankruptcy	Bankruptcy Collection	OBCR	BOOLEAN
Deceased	Deceased Collection Status	OBCR	BOOLEAN
Hardship	Hardship Collection Status	OBCR	BOOLEAN
Re-Marketing	Re-Marketing Collection Status	OBCR	BOOLEAN
Forbearance	Forbearance Collection Status	OBCR	BOOLEAN
Repossession	Repossession Collection Status	OBCR	BOOLEAN
ExpiryDate	Expiry Date	OBCR	DATE
SettlementTerm	Settlement Term	OBCR	TEXT
SettlementStatus	Settlement Status	OBCR	TEXT
SettlementAmount	Settlement Amount	OBCR	NUMBER
SettlementDate	Settlement Date	OBCR	DATE
OfferDate	Offer Date	OBCR	DATE
InterestAmount	Interest Amount	OBCR	NUMBER
LPID	Last Promise Installment Date	OBCR	DATE
CBD	Current Business Date	OBCR	DATE
PrincipalAmount	Principal Amount	OBCR	NUMBER
ChargeoffDate	Chargeoff Date	OBCR	DATE

Config update for report service

Next, for the plato-report-service, please make sure the below configurations done on the OBMA server.

**Note:**

This step is to be performed if not already done.

Create a directory by the name `report-fop-config` under `/scratch/env` directory.

Then, copy the file `fop.xconf` from the location `/THIRD_PARTY_SOFTWARE/report-fop-config` inside the package to the above created location.

Once done please run the below command

```
chmod 0755 /scratch/env/report-fop-config/fop.xconf
```

OBRH Template Setup

You are responsible for validating the following configuration for the OBRH template screen after setting up OBRH.

Update the host and port with the correct values for each template for the service provider.

Figure 5-1 External Service Provider Screen 1

OBCR_WHATSAPP > Service Providers > EXTERNAL_OFFER 1.0

Implementation

Add Import Search

Actions	Name	Description	Service Name	Host	Port	Queue
⋮	EXTERNAL_OFFER_Default	Default Implementation		ofss-mum-715.snbomprshared1.gbucdsnt02bom.oraclevcn.com	17777	

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Figure 5-2 External Service Provider Screen 2

OBCR_OBPY > Service Providers > OBPY 1.0

Implementation

Add Import Search

Actions	Name	Description	Service Name	Host	Port	Queue
⋮	OBPY_Default	Default Implementation		ofss-mum-5362.snbomprshared2.gbucdsnt02bom.oraclevcn.com	8027	

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6

Restart and Refresh

This topic describes the procedure to restart and refresh the servers.

Once everything is deployed, restart all the managed servers. For each application, call path / `refresh` to refresh the configuration properties.

Restart Server

To restart the server, see chapter [Restart Server](#) of *Configuration and Deployment Guide*.

7

Logging Area

This chapter describes the logging area of Oracle Banking Collections applications in server.

The logging area is configurable. The user can configure any path within the server, where you want to write the Oracle Banking Collections application logs. Oracle Banking Collections applications write the logs in the configured path with the name: **<Application name>.logs**. For example, if application name is **obcr-action-services**, then the logs file name would be **obcr-action-services.log**.

8

Troubleshooting

This section consists of the following topics:

- [Troubleshooting for OBMA Patch Installation](#)
- [Troubleshooting for plato-apigateway-router](#)

8.1 Troubleshooting for OBMA Patch Installation

If the OBMA services are not up after patch installation, please check the plato-config-server logs at the below location for further analysis.

```
/scratch/obma/domain/PlatoInfra/servers/Config_Server1/logs
```

If you see an error like “args list too long”, please navigate to the below file `setUserOverrides.sh` at location `/scratch/obma/domain/PlatoInfra/bin` and remove the unwanted properties. Then, please restart `Config_Server1` on weblogic followed by the other managed servers. Once done, make OBMA services are up and running.

8.2 Troubleshooting for plato-apigateway-router

If you observe any SSL related issues in the plato-apigateway-router logs, then follow the below steps.

1. Stop the router by killing the router process.
2. Import the crt files into the java trust store on the VM on which the router is installed (the foundation machine ideally).
3. One crt file will be of the same foundation machine, while the other crt file(s) will be of the machine(s), the foundation machine has performed a sync with. Replace the password placeholder with the actual one.

```
cd /scratch/ssl/cacerts
```

```
keytool -importcert -file ofss-mum-2672.crt -keystore /scratch/obma/  
jdk-17.0.12/lib/security/cacerts -storepass <password> -noprompt
```

```
keytool -importcert -alias domainCertForRouter -file ofss-mum-2550.crt -  
keystore /scratch/obma/jdk-17.0.12/lib/security/cacerts -storepass  
<password> -noprompt
```

4. Restart the router using through the OBMA installer using the below runlist.

```
run_list ['recipe[obma_weblogic::deployapigateway_router]']
```