Oracle® FLEXCUBE Investor Servicing

Oracle FLEXCUBE Investor Servicing Installer Index

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Contents

Preface

1 Security Guidelines

2 Environment Setup

3 Support for Extensibility

4 Installer Installation

5 Oracle FLEXCUBE Investor Servicing Installation

6 Maintenance

7 Installer Utilities

8   Troubleshooting

Index

Preface

Oracle FLEXCUBE Investor Servicing is a comprehensive mutual funds automation software from Oracle® Financial Servicing Software Ltd.©.

You can use the system to achieve optimum automation of all your mutual fund investor servicing processes, as it provides guidelines for specific tasks, descriptions of various features and processes, and general information.

This topic contains the following sub-topics:

- Purpose
- Audience
- Documentation Accessibility
- Critical Patches
- Diversity and Inclusion
- Conventions
- Screenshot Disclaimer
- Acronyms and Abbreviations

Purpose

This manual is designed to help acquaint you with the installation of **Oracle FLEXCUBE Investor Servicing** application.

Audience

This manual is intended for the following User/User Roles:

Table 1   Users and Roles

Users	Roles
Implementation team	Implementation of Oracle FLEXCUBE Investor Servicing
Presales team	Install Oracle FLEXCUBE Investor Servicing for demo purpose
Bank personnel	Who installs Oracle FLEXCUBE Investor Servicing

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at Critical Patches, Security Alerts and 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.

Conventions

The following text conventions are used in this document:

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

Table 2   Acronyms and Abbreviations

Abbreviation	Description
FCIS	Oracle FLEXCUBE Investor Servicing
OEM	Oracle Enterprise Manager

Table 2   (Cont.) Acronyms and Abbreviations

Abbreviation	Description
EMS	Electronic Messaging Service
EJB	Enterprise Java Bean
MDB	Message Driven Beans

1

Security Guidelines

This topic describes about the Security Guidelines.

The user of this manual should ensure security guidelines for this release of Oracle FLEXCUBE are adhered to as mentioned in the *Security Guide* document. This is a pre-requisite before proceeding further.

2

Environment Setup

This topic describes about the Environment Setup.

This topic helps you get an outline of the sub-topics included in the Installation Manuals and provides a summary of each sub-topic. You can identify the sub-topics containing the details of each activity that you will perform during **Oracle FLEXCUBE Investor Servicing** installation.

The Installation Manuals are organized as follows:

- Prerequisites
  This topic describes about prerequisites required for installing **Oracle FLEXCUBE Investor Servicing**.

- Setting up Client Browsers
  This topic describes about setting up client browsers.

- Application Server Settings
  This topic describes about application server settings.

2.1 Prerequisites

This topic describes about prerequisites required for installing **Oracle FLEXCUBE Investor Servicing**.

This manual describes the prerequisites required for installing Oracle FLEXCUBE Investor Servicing.

Refer to the topic *Prerequisites for Oracle FLEXCUBE Investor Servicing Installer* for more information on this.

This also lists out the tasks like setting up

- Database Settings

- Application servers Settings

- Client browsers Settings

You need to set up before you begin with the installation of **Oracle FLEXCUBE Investor Servicing**. The document refers to the release notes for qualified version.

2.2 Setting up Client Browsers

This topic describes about setting up client browsers.

Client browsers are required to run **Oracle FLEXCUBE Investor Servicing** and other applications. You need to configure the browsers after installation in order to run these applications properly in the browsers.

This topic gives you the basic instructions for Configuring browser for launching **Oracle FLEXCUBE Investor Servicing** in the browser. It also explains the step by step process of clearing Cache, suppressing Cache, methods for setting trusted sites and popup blocker.

Refer the following topics for setting up client browsers:

- *Apple Safari Settings*
- *Firefox Browser Settings*
- *Google Chrome Settings*
- *Microsoft EDGE Settings*

2.3 Application Server Settings

This topic describes about application server settings.

This topic explains the process to configure Weblogic Server. The process involves creation of domain, pack and unpack of domain, JVM tuning and JDBC tuning. It also explains the process of starting of managed servers using scripts and starting Admin server.

Refer to the Prerequisite of *Security Guide* document for making the environment more safe and secured.

Refer to the topic *Weblogic Configuration* for setting up safe and secure Application server.

3

Support for Extensibility

This topic describes about the Support for Extensibility

This topic explains the customization of LDAP authentication for **Oracle FLEXCUBE Investor Servicing**. This explains the detailed instructions to be followed for customising LDAP authentication. There are detailed instructions for creating property file, building EAR, setting up database and deploying application for all the components supported by **Oracle FLEXCUBE Investor Servicing** Installer.

Refer the *INFRA Extensibility Details* in the *Extensibility* user manual for further information on the customization of LDAP.

4
Installer Installation

This topic describes about the Installer Installation.

Installer support installation of **Oracle FLEXCUBE Investor Servicing** in two modes Graphical mode and Silent mode.

Table 4-1   Installer Installation

Topics	Descriptions
Graphical Installer	This topic gives the basic instructions for setting up the prerequisites for running the installer in Graphical mode. Refer to the topic *Setting up Oracle FLEXCUBE Investor Servicing Installer* for the steps to be followed before getting started with the installer in UI mode.
Silent Installer	This topic gives the basic instructions for setting up the pre requisites for running the installer in Silent mode. Refer to the topic *Run Oracle FLEXCUBE Installer in Silent Mode* in *Setting up Oracle FLEXCUBE Investor Servicing Installer* for the steps to be followed before getting started with the installer in SILENT mode.

5

Oracle FLEXCUBE Investor Servicing Installation

This topic describes about the Oracle FLEXCUBE Investor Servicing Installation.

The *Oracle FLEXCUBE Investor Servicing Installation* describes the various build and deployment options available in the installer. Also, it talks about the various components that make up **Oracle FLEXCUBE Investor Servicing**. There are detailed instructions for creating property file, building EAR, setting up database and deploying application for all the components supported by **Oracle FLEXCUBE Investor Servicing** Installer.

Refer *Securing Oracle FLEXCUBE Investor Servicing* in the *Security Guide* user manual for making the environment more safe and secured.

6
Maintenance

This topic describes about the Maintenance.

Table 6-1   Maintenance

Topics	References
Purging	This topic explains the detailed instructions to be followed for *Building SWITCH EAR*. It explains the step by step instructions for building the EAR with the corresponding property file.
Password Change for Oracle FLEXCUBE	This topic explains the instructions for changing the passwords. The topic *Oracle FLEXCUBE Password Change* explains the process of changing passwords in Oracle FLEXCUBE, changing password in Oracle weblogic like schema password and changing passwords in server.
Scheduler PLSQL JOB Creation	This topic *Scheduler PLSQL JOB Creation* explains the procedure to be followed for Scheduler PLSQL JOB Creation for Oracle FLEXCUBE Investor Servicing.
Scheduler JAVA JOB Creation	This topic *Scheduler JAVA JOB Creation* explains the procedure to be followed for Scheduler JAVA JOB Creation for Oracle FLEXCUBE Investor Servicing.

7
Installer Utilities

This topic describes about the Installer Utilities.

Table 7-1   Installer Utilities

Topics	References
User Creation Utility	This topic explains the instructions to be followed for User Creation for the database using Oracle FLEXCUBE Investor Servicing installer. Refer to the topic *User Creation Utility* for more information on this.
Cross Schema Execution	This Utility need to be used to create synonyms of other schema. This topic explains the instructions to be followed for Cross Schema Script Execution for the database using Oracle FLEXCUBE Investor Servicing installer. This is a mandatory step that needs to be executed post the DB installation step. Refer to the topic *Cross Schema Scripts Utility* for more information on this.
Internal Handoff Grants	This topic explains the instructions to be followed for Internal Handoff Grants provision using Oracle FLEXCUBE Investor Servicing installer. Refer to the topic *Internal Handoff Grants Utility* for more information on this.

8

Troubleshooting

This topic describes about the Troubleshooting.

The *Troubleshooting* topic provides the resolution details for some of the known problems faced while using the Oracle FLEXCUBE Investor Servicing installer.

Glossary

Index