

# Oracle® FLEXCUBE Investor Servicing FCIS Oracle Digital Assistant Integration Guide



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ORACLE®

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# 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
<b>boldface</b>	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.
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
<b>FCIS</b>	Oracle FLEXCUBE Investor Servicing
<b>OEM</b>	Oracle Enterprise Manager

**Table 2 (Cont.) Acronyms and Abbreviations**

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

# 1

## Oracle Digital Assistant (ODA)

This topic gives an overview on Oracle Digital Assistant (ODA).

**Oracle Digital Assistant (ODA)** is provided by Oracle as a cloud based product.

**FCIS** connects to the chat server via URI and channel id.

- URI is the Chat Server URL.
- Channel Id is Web Channel Id through which communication happens.

**FCIS** makes use of web-sdk provided by Oracle to connect to the chatbot server. The web-sdk JavaScript files are not bundled with **FCIS**. These files need to be downloaded separately.

The parameter chatbot to denote enable/disable is added in **fcubs.properties** file.

A small popup screen is available as a chatbot where user can type his/her query related to **FCIS**. The chatbot replies on the same window to the user.

**Chatbot** can also start the screen based on the user confirmation.

In **Oracle Digital Assistant**, chatbots for different purposes are created as **Skills**.

Once a chatbot (skill) is created, **Channels** need to be created in ODA to expose the Chatbots to the external environment.

A specific channel of type **Oracle Web** shall be created dedicatedly for **FCIS**.

Various parameters as detailed in the below diagram (figure 3) shall be configured while creating a channel. It includes channel identifier, channel type, allowed domains, secret key (auto-generated) and channel ID. Client authentication and session expiration shall also be set here. The parameters for **FCIS** are set as mentioned in the screenshot. The secret key and the channel ID help the client pick the right channel and interact with desired chatbot.

- [Integrate Oracle Digital Assistant](#)  
This topic describes the steps to integrate Oracle Digital Assistant.
- [Microphone Access to the Application](#)  
This topic describes the steps to give microphone access to the application.
- [Import skills to ODA server](#)  
This topic describes the steps to import skills to ODA server.
- [Channel Creation](#)  
This topic describes the steps to create Channels.
- [Test ChatBot](#)  
This topic describes the steps to test ChatBot.

### 1.1 Integrate Oracle Digital Assistant

This topic describes the steps to integrate Oracle Digital Assistant.

This topic assumes that the **FCIS** related software are present and configured properly.

- Download the Web-sdk related javascript files pertain to Oracle Digital Assistant (ODA) from the link <https://www.oracle.com/downloads/cloud/amce-downloads.html>.
  - ODA instance are created and chat server url and channel id are readily available.
1. Download the web-sdk related javascript files for the integration.
  2. Place the web-sdk.js files inside FCIS osdc folder in the path, INFRA\FCJNeoWeb\Web-Content\script\JS.
  3. Enable the **ChatBot** while creating property file for **FCIS** Application.

### Note

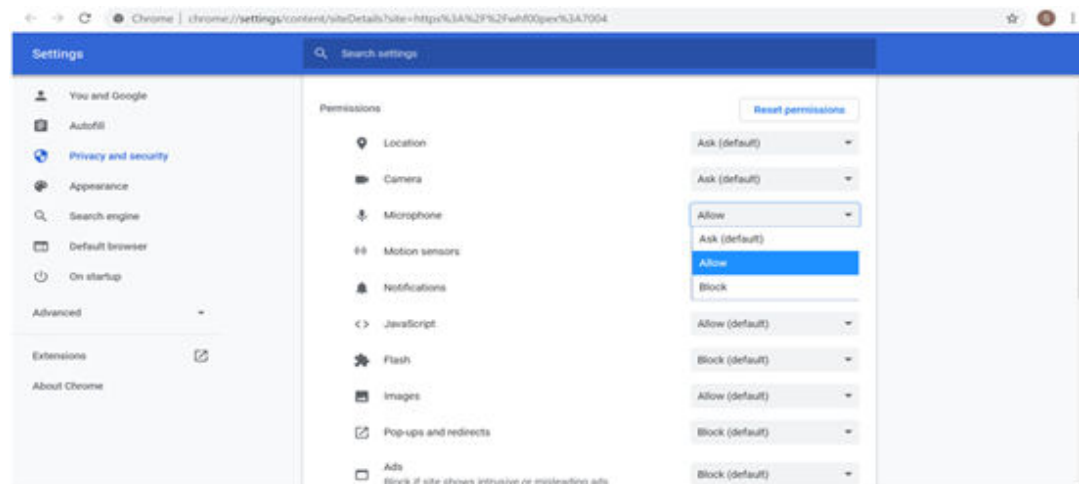
Detailed information on configuring Chatbot properties is provided in the topic *FCIS Property File Setup*.

## 1.2 Microphone Access to the Application

This topic describes the steps to give microphone access to the application.

1. When trying to access the FCIS url, Microphone access shall be given in browser level for the application url after deployment.
2. On the browser setting, select the option **Allow** to access microphone in the **Permissions** tab.

Figure 1-1 Microphone Access



## 1.3 Import skills to ODA server

This topic describes the steps to import skills to ODA server.

Follow the steps below to import the chatbot into **Oracle Digital Assistant (ODA)**:

1. In the FCISODA.war file in osdc path (ADAPTERS\ODA), provide the below details in channel.properties file.
  - a. smsjndi



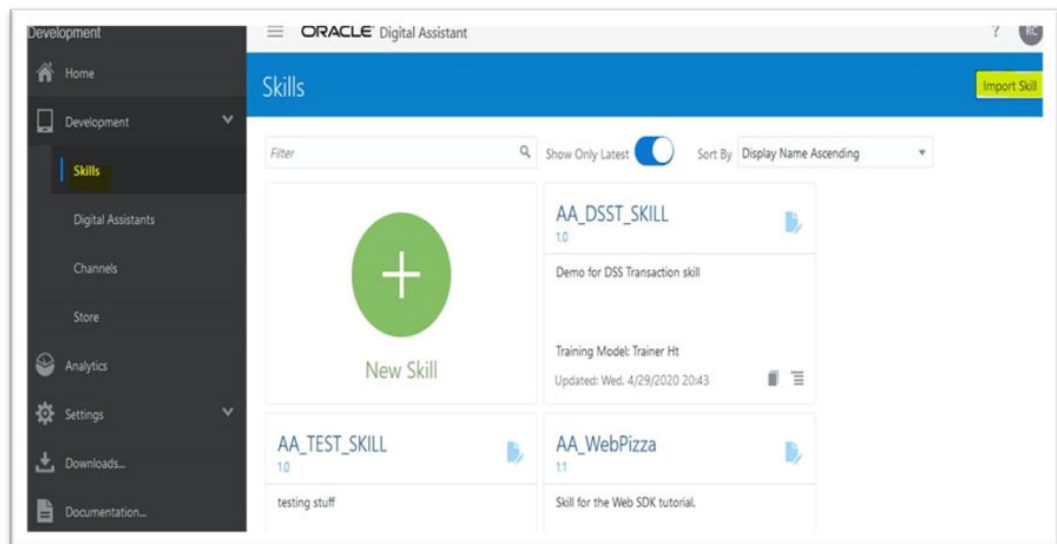
- b. source (ODA)
  - c. ubsComp
  - d. branch
  - e. service (Example: fundBalanceService=http://<host>:<port>/FundBalanceService/)
2. Deploy the fcisoda.war file as an application in the weblogic server.
  3. Deploy jax-rs-2.0.war as library in the weblogic server.
  4. Note down ODA service URL.

**Example:** http://<host>:<port>/fcisoda/v1/fulfillment.

5. In ODA, select **Skills** under **Development** menu and click **Import Skill** button.

A new window pops up from where the **FCISSkill** zip file in osdc path (ADAPTERS\ODA), needs to be selected to import. Once the zip file is imported successfully, the chatbot shall be available in the skills list.

**Figure 1-2 Skills and Channels**



6. In ODA skill, under component section, add new service by providing the service name and service type as **External**.
7. Give the Metadata URL. Modify the **Username** and **Password** with weblogic credentials and click create.

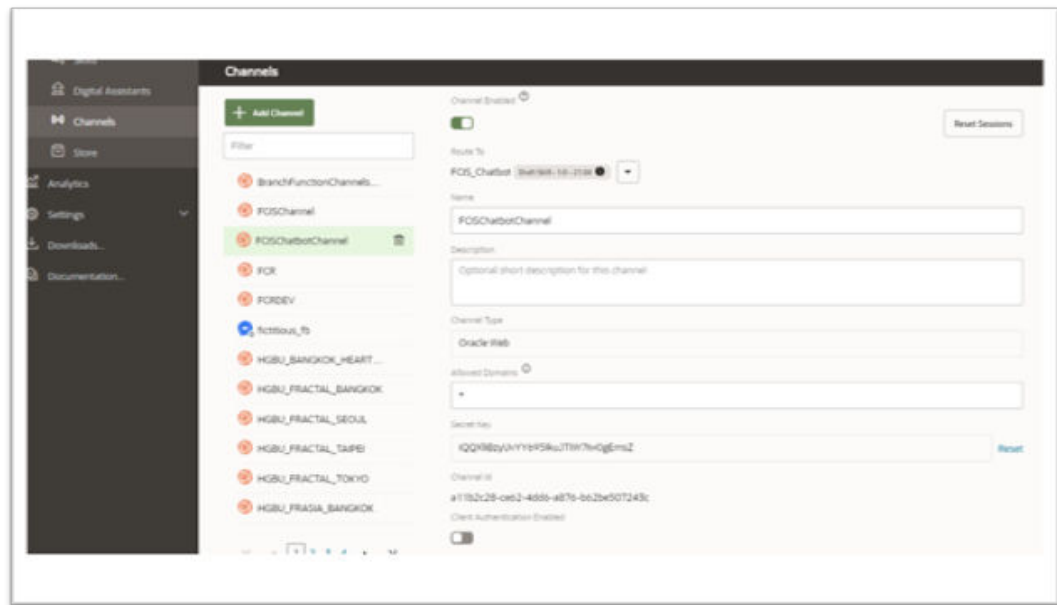
Then, a channel needs to be created and the imported skill needs to be mapped to that channel.

## 1.4 Channel Creation

This topic describes the steps to create Channels.

1. Create **Channels** at the ODA side to expose the chatbots to the external environment.

Figure 1-3 Create Channel



2. Click **+Channel** button in the channels section to create a new channel. Channel of type **Oracle Web** has to be created for **FCIS**.

Preferred channel name should be mentioned, followed by the various parameters as detailed in the below diagram (figure below) can be configured while creating a channel. It includes channel identifier, channel type (Mandatory **Oracle Web**), allowed domains, secret key (auto-generated) and channel ID (auto-generated).

3. Client authentication and session expiration can also be set here. In **Route To** field, the skill (chatbot) which had got imported as zip file needs to be mapped. The secret key and the channel ID helps the client pick the right channel and interact with desired chatbot. Once a channel is created, chatbot Url and the channel id which gets generated should be configured in the **fcubs.properties** file.

#### Note

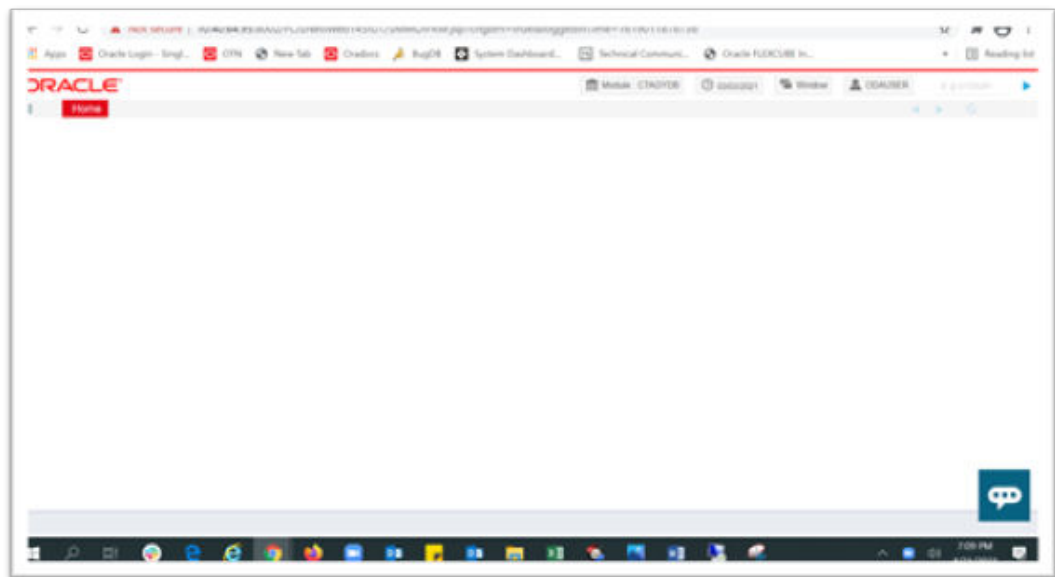
In the TA side, a new external source should be maintained as **ODA**.

## 1.5 Test ChatBot

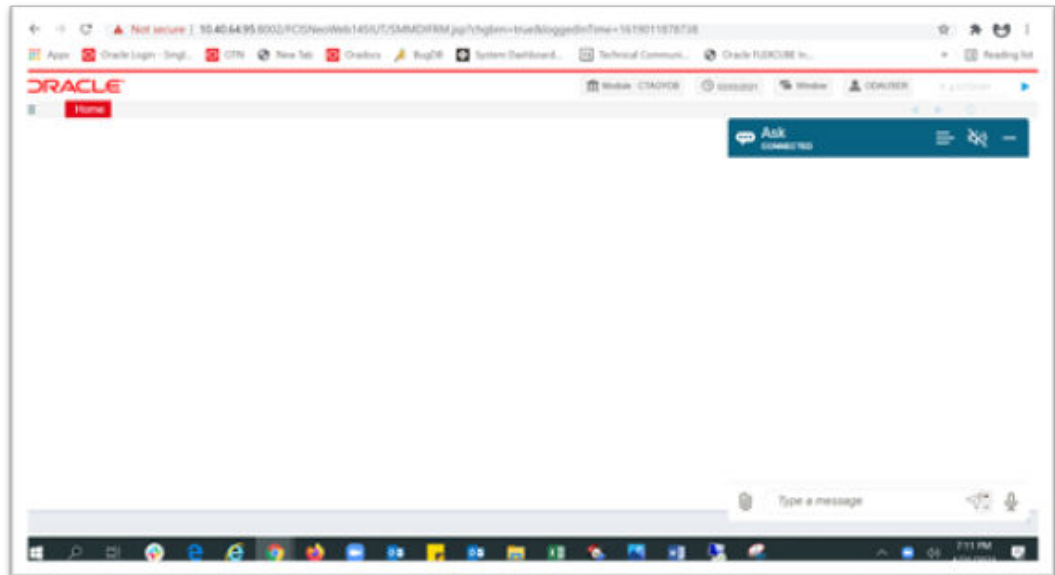
This topic describes the steps to test ChatBot.

1. Log in to the Application.

The chat bubble appears in the Application screen.

**Figure 1-4 Chat Bubble**

2. Click the Chat bubble.  
The actual chat window appears.

**Figure 1-5 Chat Window**

3. User can ask question to the bot and bot responds back.

**Figure 1-6 Bot Response**