Design Pack Installation Guide

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1 Design Pack Installation

Installing the Branch Teller Design Pack

Introduction

The Siebel Retail Finance Branch Teller Design Pack is part of the Siebel Retail Finance Branch Teller Extension Pack. This is a full Design Pack release containing all analysis documents, design model files and generated design documents for the Branch Teller module. The Branch Teller Design Pack also contains analysis and design collateral for the Entitlements sub-module that supports Branch Teller.

The XML model export and the design documents generated from the design model have been generated using the Siebel Retail Finance Design Tools.

Document Convention

Version 2004.5.3 is substituted with vx.x throughout this document – for 'vx.x' read 'v2004.5.3'

Software Requirements

Please note that the design model contained in this release was built using the Rational Rose Professional J Edition 2000e version of Rational Rose. Working with the model in another version of Rational Rose may cause errors to be displayed.

Content of the Branch Teller Design Pack

The Branch Teller Design Pack can be found in a zip file called **SiebelRetailFinanceBranchTellerDesignPackvx.x.zip** on the Siebel Retail Finance Branch Teller Extension Pack CD/DVD**.** When extracted, the Design Pack contains the following elements:

- A Rational Rose design model with workspaces for the Branch Teller module and Entitlements submodule. The model is contained in the \Rational Rose Model folder and its subfolders.
- HTML design documents generated from the Branch Teller model are contained in the \RoseGeneratedDocs folder and its subfolders.
- Analysis documents (Requirement Definition, GUI and Use Case documents) for Branch Teller (including Entitlements) are contained in the \FrontEnd and \RequirementsDefinition folders and their subfolders.
- An XML export from the design model for Branch Teller is contained in the \Model XML export folder and its subfolders. The XML export of the generic model, supplied in this release as the file **SiebelRetailFinanceBranchTellervx.x.xml,** can be used for importing Branch Teller

processes into the Screen Orchestrator and FPI tools that are part of the Siebel Retail Finance Financial Transactions Workbench.

Non-Teller model files included in the release

The design model in this release contains some model files for entities and sessions and other model classes that are not loaded by either the Branch Teller or Entitlements workspaces. These model files are loaded by the workspaces for other Siebel Retail Finance modules. These model files are provided in this and every model release to Siebel Retail Finance-licensed customers for reference purposes and these classes can be imported, if so wished, into an extended design model on the customer site if such classes are not available in the generic Branch Teller set of designs as defined by the Branch Teller workspace. If a customer project wants to use a Siebel Retail Finance class on its Branch Teller implementation that is not loaded by the Branch Teller or Entitlements workspace (and hence not included in deployed code in the product release), then the customer should inform Siebel Retail Finance. In that case, subject to agreement on capacity, scheduling and any associated costs, the code for the class could be added into a future Siebel Retail Finance's generic Branch Teller product release that the customer can avail of.

Installing/upgrading to this release

There are two general scenarios for installing a Design Pack release:

Simple installation or replacement scenario: The scenario where a customer has not received a previous release of the Branch Teller Design Pack **or** the scenario where all contents of the previously installed Design Pack release can simply be replaced with the content of the current release pack that then becomes the new generic Design Pack baseline for a Branch Teller project. This latter scenario occurs where no design extension work has taken place to date on the installed generic design model that would be lost if the domain layer design files in this release are copied in without a merge.

Upgrade scenario: The scenario where the model from a previous Branch Teller Design Pack has already been installed as the generic baseline for a Branch Teller project and has already been extended on the project.

The following sections of this chapter contain instructions for the simple installation scenario only. If information is required on how to upgrade to this release from a Branch Teller Design Pack release that has already been extended, please contact Siebel Support at support@siebel.com.

Installing the release as the baseline generic Branch Teller Design Pack

This section describes how to install this release as the initial baseline Branch Teller Design Pack on a customer project or to completely replace a previous release with the current release in a scenario where no extension work has taken place on the customer project.

The release is installed by first extracting the Design Pack release zip file to a temporary folder and then by moving the different release content areas to the required working folders or storage areas as used by the project team on the customer site. This may also involve moving a copy of the release into a configuration management system on the customer project, with appropriate baseline labelling.

Installing the analysis and generated design documents in the release

1. Delete the analysis and generated design documents from any previous generic Branch Teller release that already exist in the customer's workspace. Note that the files from a previous release can be labeled and stored in the customer's configuration management system for the project.
2. Extract the contents of the "\FrontEnd", "\RequirementsDefinition", \RoseGeneratedDocs" and "\Templates" folders in the release zip to the project workspace as a whole unit. Retain the relative position of analysis and generated design documents using the folder structures in the release zip so that hyperlinks between analysis docs and generated documents will continue to work. The extracted files can be labeled and stored as the vx.x release in the customer's configuration management system for the project.
3. It is possible to navigate through all the analysis and generated design documents for a component in the release by following the hyperlinks from the Requirements Definition document for that component. These documents can be found in the folder \RequirementsDefinition.
4. To browse through the generated design documents for the Branch Teller model as a whole open the file \RoseGeneratedDocs\index.html, which contains hyperlinks to further index pages for generated documents for the different class types (financial objects, sessions, parameter objects etc.) to be found in the Branch Teller design model.

Installing the design model in the release

1. Delete the model files from any previous generic Branch Teller release that already exist in the workspace for the customer project. Note that the files from a previous release can be labeled and stored in the customer's configuration management system for the project.
2. Extract the "\Rational Rose Model\Siebel Retail Finance Model" folder and all its contents (including subfolders) from the Design Pack release zip file to the designated root folder for the design model in the project workspace (which can have any name and path such as d:\vault or c\model etc.), retaining the relative structure of the subfolders that is present in the release zip. Note that the **.mdl** (model) and **.wsp** (workspace) files in the release load the model **.cat** files in the release from a subfolder structure that is relative to the model and workspace file so folder structures must be maintained relative to these files as per the structure in the release. The extracted files can be labeled and stored as the vx.x release in the customer's configuration management system for the project.

Opening the Branch Teller generic design model

Two workspace files have been included in this release – the **teller.wsp** and **entitlements.wsp** files, which should be used together to open the Branch Teller model.

To open up the Branch Teller model workspace double-click on the **teller .wsp** file in the folder "\Rational Rose Model\Siebel Retail Finance Model". To load the Entitlements submodule workspace and thus add the Entitlements classes into the Branch Teller model, double click on the **entitlements.wsp** file in the same folder.

Note that the Branch Teller model should be opened by opening the workspace (the **.wsp** files) files and not by opening the overall Rational Rose model file (the **.mdl** file) as this loads many model classes that are not required by the Branch Teller product and that are not shipped in the Branch Teller release.

Installing the Internet Banking Design Pack

Introduction

The Siebel Retail Finance Internet Banking Design Pack is part of the Siebel Retail Finance Internet Banking Extension Pack. This is a full Design Pack release containing all analysis documents, design model files and generated design documents for the Internet Banking module. The Internet Banking Design Pack also contains analysis and design collateral for the Entitlements submodule that supports Internet Banking.

The XML model export and the design documents generated from the design model have been generated using the Siebel Retail Finance Design Tools

Document Convention

Version 2004.5 is substituted with vx.x throughout this document – for 'vx.x' read 'v2004.5'

Software Requirements

Please note that the design model contained in this release was built using the Rational Rose Enterprise Edition 2003 version of Rational Rose. Working with the model in another version of Rational Rose may cause errors to be displayed.

Content of the Internet Banking Design Pack

The Internet Banking Design Pack can be found in a zip file called **SiebelRetailFinanceInternetBankingDesignPackvx.x.zip** on the Siebel Retail Finance Internet Banking Extension Pack CD/DVD**.** When extracted the Design Pack contains the following elements:

- A Rational Rose design model with workspaces for the Internet Banking module and Entitlements submodule. The model is contained in the \Rational Rose Model folder and its subfolders.
- HTML design documents generated from the Internet Banking model are contained in the \RoseGeneratedDocs folder and its subfolders.
- Analysis documents (Requirement Definition, GUI and Use Case documents) for the Internet Banking, including Entitlements, are contained in the \FrontEnd and \RequirementsDefinition folders and their subfolders.

- An XML export from the design model for Internet Banking is contained in the \Model XML export folder and its subfolders. The XML export of the generic model, supplied in this release as the file **SiebelRetailFinanceInternetBankingvx.x.xml,** can be used for importing Internet Banking processes into the Screen Orchestrator and FPI tools in the Siebel Retail Finance Financial Transactions Workbench.

Other model files included in the release

The design model in this release contains some model files for entities and sessions and other model classes that are not loaded by either the Internet Banking or Entitlements workspaces. These model files are loaded by the workspaces for other Siebel Retail Finance modules. These model files are provided in this and every model release to Siebel Retail Finance-licensed customers for reference purposes and these classes can be imported, if so wished, into an extended design model on the customer site if such classes are not available in the generic Internet Banking set of designs as defined by the Internet Banking workspace. If a customer project wants to use a Siebel Retail Finance class on its Internet Banking implementation that is not loaded by the Internet Banking or Entitlements workspace (and hence not included in deployed code in the product release), then the customer should inform Siebel Retail Finance. In that case, subject to agreement on capacity, scheduling and any associated costs, the code for the class could be added into a future Siebel Retail Finance's generic Internet Banking product release that the customer can avail of.

Installing/upgrading to this release

There are two general scenarios for installing a Design Pack release:

Simple installation or replacement scenario: The scenario where a customer has not received a previous release of the Internet Banking Design Pack **or** the scenario where all contents of the previously installed Design Pack release can simply be replaced with the content of the current release pack that then becomes the new generic Design Pack baseline for an Internet Banking project. This latter scenario occurs where no design extension work has taken place to date on the installed generic design model that would be lost if the domain layer design files in this release are copied in without a merge.

Upgrade scenario: The scenario where the model from a previous Internet Banking Design Pack has already been installed as the generic baseline for an Internet Banking project and has already been extended on the project.

The following sections of this chapter contain instructions for the simple installation scenario only. If information is required on how to upgrade to this release from an Internet Banking Design Pack release that has already been extended, please contact Siebel Support at support@siebel.com.

Installing the release as the baseline generic Internet Banking Design Pack

This section describes how to install this release as the initial baseline Internet Banking Design Pack on a customer project or to completely replace a previous release with the current release in a scenario where no extension work has taken place on the customer project.

The release is installed by first extracting the Design Pack release zip file to a temporary folder and then by moving the different release content areas to the required working folders or storage areas as used by the project team on the customer site. This may also involve moving a copy of the release into a configuration management system on the customer project, with appropriate baseline labelling.

Installing the analysis and generated design documents in the release

1. Delete the analysis and generated design documents from any previous generic Internet Banking release that already exist in the customer's workspace. Note that the files from a previous release can be labeled and stored in the customer's configuration management system for the project.
2. Extract the contents of the "\FrontEnd", "\RequirementsDefinition", \RoseGeneratedDocs" and "\Templates" folders in the release zip to the project workspace as a whole unit. Retain the relative position of analysis and generated design documents using the folder structures in the release zip so that hyperlinks between analysis docs and generated documents will continue to work. The extracted files can be labeled and stored as the vx.x release in the customer's configuration management system for the project.
3. It is possible to navigate through all the analysis and generated design documents for a component in the release by following the hyperlinks from the Requirements Definition document for that component. These documents can be found in the folder \RequirementsDefinition.
4. To browse through the generated design documents for the Internet Banking model as a whole open the file \RoseGeneratedDocs\index.html, which contains hyperlinks to further index pages for generated documents for the different class types (financial objects, sessions, parameter objects etc.) to be found in the Internet Banking design model.

Installing the design model in the release

1. Delete the model files from any previous generic Internet Banking release that already exist in the workspace for the customer project. Note that the files from a previous release can be labeled and stored in the customer's configuration management system for the project.
2. Extract the "\Rational Rose Model\Siebel Retail Finance Model" folder and all its contents (including subfolders) from the Design Pack release zip file to the designated root folder for the design model in the project workspace (which can have any name and path such as d:\vault or c\model etc.), retaining the relative structure of the subfolders that is present in the release zip. Note that the **.mdl** (model) and **.wsp** (workspace) files in the release load the model **.cat** files in the release from a subfolder structure that is relative to the model and workspace file so folder structures must be maintained relative to these files as per the structure in the release. The extracted files can be labeled and stored as the vx.x release in the customer's configuration management system for the project.

Opening the Internet Banking generic design model

Two workspace files have been included in this release – the **e-banking.wsp** and **entitlements.wsp** files, which should be used together to open the Internet Banking model.

To open up the Internet Banking model workspace double-click on the **e-banking.wsp** file in the folder "\Rational Rose Model\Siebel Retail Finance Model". To load the Entitlements submodule workspace and thus add the Entitlements classes into the Internet Banking model, double-click on the **entitlements.wsp** file in the same folder.

Note that the Internet Banking model should be opened by opening the workspace (the **.wsp** files) files and not by opening the overall Rational Rose model file (the **.mdl** file) as this loads many model classes that are not required by the Internet Banking product and that are not shipped in the Internet Banking release.