



Banking Application Installation Guide

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1

What's New in this Release

The following changes have been introduced in the Banking Application Installation Guide, Version 2004.5, Rev C:

Topic	Description
Importing the Oracle dump file for WebLogic, page 13.	The instructions for importing the Oracle dump file for a WebLogic environment have changed.
Configuring the Properties File, pages 16 and 30.	The BankframeResource.properties value for security.provider has been changed to com.bankframe.util.securityproviders.DelegatingSecurityProvider.
Deploying the Banking Application on a WebSphere Clustered Environment, page 20.	Instructions for deploying the Siebel Retail Finance Banking Application on a WebSphere clustered environment have been added.
Importing the Oracle dump file for WebSphere, page 23.	The instructions for importing the Oracle dump file for a WebSphere environment have changed.
Running Branch Offline, page 40.	Added a description of the <code>-Doffline.helper.test.file</code> setting in the <code>OfflineTest</code> file.
Configuring the database for integration with Siebel Financial Services, page 43.	Added a description of the CRC (Customer Relationship Console) processes that correspond to the Siebel Financial Services integration related DESTINATION_IDs in the DESTINATION table.
Configuring the database for integration with Siebel Financial Services, page 44.	The CONNECTOR_PROPERTIES value in the DESTINATION table for CRC002 has been updated.

2

The Banking Application

The Siebel Retail Finance Banking Application consists of the following components:

- A database containing the data required by the product.
- A deployable Enterprise Application Archive (EAR), which contains:
 - The standard server-side functionality of the Banking Application that is deployed on a Central Server.
 - Java Swing-based client and administration applications for Branch Teller.
 - Web applications for Internet Banking, Entitlements and MCA Services administration functionality.
- A Branch Offline Server
- Configuration files for integration with Siebel Financial Services 7.7

This document describes how to:

- Create and configure the database
- Deploy the Banking Application EAR file
- Deploy and configure the Branch Offline Server
- Configure printing
- Launch the Siebel Retail Finance Banking applications
- Integrate with Siebel Financial Services 7.7

3 WebLogic 8.1 Installation Process

This chapter is organized into the following major sections:

- Requirements for Installing the SRF Banking Application on Windows
- Requirements for Installing the SRF Banking Application on Unix
- Extracting the SRF Banking Application Files
- Setting up the Oracle Database
- Deploying the Banking Application on WebLogic
- Configuring the Deployment Parameters
- Running the Deployment Script
- Configuring BankframeResource.properties
- Configuring the Database Drivers
- Starting the Server

NOTE: Refer to the Siebel Retail Finance System Requirements and Supported Platforms document on the Siebel SupportWeb website (<http://supportweb.siebel.com/>) for information regarding the supported environments, including the supported database and application server versions and supported versions of third party software. Your Siebel TAM will have provided you with a SupportWeb logon.

Requirements for Installing the SRF Banking Application on Windows

This section outlines the installation prerequisites when installing the Siebel Retail Finance Banking Application on Windows. This guide assumes the installation locations listed below; adjust the values in the examples to your machine configuration.

- The target machine must be clean, that is, not running any other WebLogic applications, including any previous version of the Siebel Retail Finance Banking Application.
- BEA WebLogic must be installed and configured. This guide assumes that the WebLogic root directory is: `D:\bea\weblogic81`
- Oracle must be installed and configured. This guide assumes that Oracle is installed at: `D:\oracle`
- The Java utilities `java`, `javac` and `jar` must be available at the command line.
- The CD-ROM drive is attached to drive: `E:\`
- If interfacing with Siebel Financial Services 7.7 is required an installation of Siebel Financial Services 7.7 is required.

Requirements for Installing the SRF Banking Application on Unix

- The target machine must be clean, that is, not running any other WebLogic applications, including any previous version of the Siebel Retail Finance Banking Application.
- BEA WebLogic 8.1.0 must be installed and configured. This guide assumes that the WebLogic root directory is: `/bea/weblogic81`
- Oracle must be installed and configured. `$ORACLE_HOME` must be configured to the Oracle installation location.
- The Java utilities `java`, `javac` and `jar` must be available at the command line.
- The CD-ROM drive is mounted at: `/mnt/cdrom`
- If interfacing with Siebel Financial Services 7.7 is required an installation of Siebel Financial Services 7.7 is required.

Extracting the SRF Banking Application Files

The Siebel Retail Finance Banking Application files are located in a jar file on the Banking Application CD for WebLogic/Oracle called: `packs\SRFBankingApplication<vx.x>WebLogicOracle.jar`.

This file must be extracted into the local file system as follows (drive D:\ is assumed throughout this document – replace as appropriate).

NOTE: All instances of `vx.x` in the instructions in this document should be substituted with the version of the software that you are using.

To extract the files on Windows type the following commands at a command prompt

```
cd /d d:\
```

```
jar xvf e:\packs\SRFBankingApplication<vx.x>WebLogicOracle.jar
```

This will create a new `siebel` folder in `d:\`

To extract the files on UNIX type the following commands in a console

```
cd /app/WebSphere
```

```
jar xvf /mnt/cdrom/packs/SRFBankingApplication<vx.x>WebLogicOracle.jar
```

This will create a new `siebel` folder in `/app/WebSphere`.

Setting up the Oracle Database

Create a database on your Oracle database (using all the default settings) server and create a user with DBA rights on this database. For the purpose of these instructions it is assumed the database is called bankfrm and the user is also called bankfrm. Please consult your Oracle documentation for information on how to create databases and users.

Oracle Database Prerequisites

- The Oracle command line utilities must be available at the command line prompt/console.
- You must create an Oracle database and make a note of the name you give it.
- You must create an Oracle user for the database. Make a note of the userid and password.
- You must create an entry for the database in the `tnsnames.ora` file for the server on which the application is to be deployed.

Importing the Oracle dump file

The database for the Siebel Retail Finance Banking Application is provided as an Oracle dump file, as some of the tables contain RAW data which cannot be imported via standard SQL insert scripts. To import the data from the dump file into your Oracle database follow the instructions below. In these instructions the existing database is first dropped and then the database is loaded with the contents of the `staging.dmp` file located at `\siebel\database\staging.dmp`. The first time the ant drop or ant load commands are executed the user is asked to supply a database user name, a database password and a database instance or db name. This process creates a `database.properties` file at `D:\temp\build_tmp\`. This `database.properties` file determines what database is going to be used by the ant drop and ant load processes. If a different database needs to be used this properties file should be configured accordingly.

In the example below it is assumed:

- The database name is `bankfrm`
- The database userid is `bankfrm`
- The database password is `bankfrm`

Adjust these values based on the database name, userid and password you choose in the previous section.

To import the Oracle dump file

- 1 Type the command `cd /d \siebel\database`
- 2 To drop the database if it already exists type the command `ant drop`
- 3 To load the database type the command `ant load`

Errors may occur when importing the dmp file – after the table Utility has been imported. The following ORACLE 942 errors should be ignored:

```
. . importing table          "USER_PREF_DEF_ACCS"          8 rows imported
. . importing table          "UTILITY"                    1 rows imported
IMP-00017: following statement failed with ORACLE error 942:

"CREATE DIMENSION "CUSTOMERS_DIM" LEVEL "CUSTOMER" IS ("CUSTOMERS"."CUST_ID"
") LEVEL "CITY" IS ("CUSTOMERS"."CUST_CITY") LEVEL "STATE" IS ("CUSTOMERS"."
"CUST_STATE_PROVINCE") LEVEL "COUNTRY" IS ("COUNTRIES"."COUNTRY_ID") LEVEL "
"SUBREGION" IS ("COUNTRIES"."COUNTRY_SUBREGION") LEVEL "REGION" IS ("COUNTRI
"ES"."COUNTRY_REGION") LEVEL "GEOG_TOTAL" IS ("COUNTRIES"."COUNTRY_TOTAL") L
"EVEL "CUST_TOTAL" IS ("CUSTOMERS"."CUST_TOTAL") HIERARCHY "CUST_ROLLUP" ("C
"USTOMER" CHILD OF "CITY" CHILD OF "STATE" CHILD OF "CUST_TOTAL") HIERARCHY "
"GEOG_ROLLUP" ("CUSTOMER" CHILD OF "CITY" CHILD OF "STATE" CHILD OF "COUNTR
"Y" CHILD OF "SUBREGION" CHILD OF "REGION" CHILD OF "GEOG_TOTAL" JOIN KEY ("
"CUSTOMERS"."COUNTRY_ID") REFERENCES "COUNTRY") ATTRIBUTE "CUSTOMER" DETERMI
"NES "CUSTOMERS"."CUST_FIRST_NAME" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMER
"S"."CUST_EMAIL" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_MAIN_PHON
"E_NUMBER" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_POSTAL_CODE" AT
"TRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_STREET_ADDRESS" ATTRIBUTE "
"CUSTOMER" DETERMINES "CUSTOMERS"."CUST_CREDIT_LIMIT" ATTRIBUTE "CUSTOMER" D
ETERMINES "CUSTOMERS"."CUST_INCOME_LEVEL" ATTRIBUTE "CUSTOMER" DETERMINES "
"CUSTOMERS"."CUST_YEAR_OF_BIRTH" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"
"."CUST_MARITAL_STATUS" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_GE
"NDER" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_LAST_NAME" ATTRIBUT
"E "CITY" DETERMINES "CUSTOMERS"."CUST_CITY" ATTRIBUTE "STATE" DETERMINES "C
"USTOMERS"."CUST_STATE_PROVINCE" ATTRIBUTE "COUNTRY" DETERMINES "COUNTRIES"."
"COUNTRY_NAME" ATTRIBUTE "SUBREGION" DETERMINES "COUNTRIES"."COUNTRY_SUBREG
"ION" ATTRIBUTE "REGION" DETERMINES "COUNTRIES"."COUNTRY_REGION" ATTRIBUTE "
"GEOG_TOTAL" DETERMINES "COUNTRIES"."COUNTRY_TOTAL" ATTRIBUTE "CUST_TOTAL" D
ETERMINES "CUSTOMERS"."CUST_TOTAL" "
```

IMP-00003: ORACLE error 942 encountered

ORA-00942: table or view does not exist

IMP-00017: following statement failed with ORACLE error 942:

To reset the Oracle database

- Type the command `ant reset-branches`

Configuring the Oracle Database

The following bat files present in the folder `\siebel\deploy\database` must be run in order to prime the database prior to first use.

Bat File	Description
<code>load_currency_symbols.bat</code>	This script drops the currency_demon table to load in the correct symbols
<code>Reset Data.bat</code>	This script resets the branches to have a processing date of yesterday
<code>updateSequences.bat</code>	This script drops the existing Entitlements sequences and recreates them at their maximum value

NOTE: You will need to replace "bankfrm" and "MCADEMO" (the supplied values in the bat files) with the username/password and database name of your database.

Deploying the Banking Application on WebLogic

Deployment onto a WebLogic server is accomplished using an install script located in the `\siebel\deploy` folder.

Configuring the Deployment Parameters

The deploy script is configured via the `build.properties` file located in the `\siebel\deploy` folder.

The following settings must be configured with the correct values for your WebLogic server.

Property	Description
db.name	The name of the database to connect to
db.user	The user name to use to connect to the database
db.password	The password to use to connect to the database

Property	Description
server.port	The port the WebLogic server will listen on
ear.path	The path to where the EAR to be deployed is located, normally only necessary to modify when deploying on Solaris

Running the Deployment Script

To run the deployment script on Windows

Open a command prompt.

Navigate to `D:\siebel\deploy` and run the following command

```
D:\siebel\Deploy>install D:\bea
```

This assumes your WebLogic installation is located at: `d:\bea`. This script will automatically create a new WebLogic server instance located at: `d:\bea\user_projects\siebel`, and deploy the EAR to this instance.

To run the deployment script on Solaris

Make sure you have updated the `ear.path` setting in `build.properties` to point to the location on the Solaris machine where you have copied the EAR.

Open a command shell, and enter the following at the command prompt:

```
cd /tmp/deploy
chmod +x install.sh
./install.sh /bea
```

This script will automatically create a new WebLogic server instance located at: `/bea/user_projects/siebel`, and deploy the EAR to this instance.

Configuring the Properties File

If you changed the port on which the WebLogic server is listening, then you must make adjustments to the `BankframeResource.properties` file. If you have not changed the `server.port` setting (from its default of `7001`) you can skip this step.

Open the following file in a text editor:

`d:\bea\user_projects\siebel\siebel.ear\resources\BankframeResource.properties` on Windows XP.

Or `/bea/user_projects/siebel/siebel.ear/resources/BankframeResource.properties` on Solaris

Use the text editor to replace all occurrences of the string: `7001` with the value of the port on which you have configured WebLogic to listen.

Search for the string `ejb.initialContextFactory=`. Replace all text to the right of this string with `weblogic.jndi.T3InitialContextFactory`, which is the WebLogic-specific context setting for WebLogic versions 4.51, 5.1, 6.1 and higher.

Search for the string `security.provider=`. Make sure that the value to the right of this string is `com.bankframe.util.securityproviders.DelegatingSecurityProvider`.

Save the file.

Configuring the Database Drivers

The path that WebLogic uses to locate the database drivers must be configured.

By default WebLogic is configured to create a `startsiebel.sh` configured for a USASCII database. The character set must now be updated to use UTF8 character set.

To configure the database drivers on Windows

Open the following file in a text editor: `\bea\user_projects\siebel\startsiebel.cmd`

For an Oracle character set, add the following line at the start of the `startsiebel.sh` file:

```
chcp 1252

set NLS_LANG=AMERICAN_AMERICA.UTF8
```

For Oracle 9.2.0, add the following line before the Java command at the end of the file:

```
set PATH=%WL_HOME%\server\bin\oci920_8;%PATH%
```

Save the file.

To configure the database drivers on Solaris

Open the following file in a text editor: `/bea/user_projects/siebel/startsiebel.sh`

For an Oracle character set add the following line at the start of the `startsiebel.sh` file:

```
NLS_LANG=AMERICAN_AMERICA.UTF8

export NLS_LANG
```

After the line beginning with the following:

```
WL_HOME=
```

Add the following to set your Java Home:

```
JAVA_HOME=$WL_HOME/../../jdk141_02; export JAVA_HOME

PATH=$JAVA_HOME/bin:$PATH; export PATH
```

For Oracle 9.2.0 add the following line before the Java command at the end of the file:

```
set LD_LIBRARY_PATH=$WL_HOME/server/lib/solaris/oci920_8:$LD_LIBRARY_PATH;  
  
export LD_LIBRARY_PATH
```

Starting the Server

To start the server on Windows

Open a command prompt

Navigate to `D:\bea\user_projects\siebel` and run the following command

```
D:\bea\user_projects\siebel>startsiebel
```

To start the server on Solaris

Open a command shell, and type the following at the command prompt:

```
cd /bea/user_projects/siebel  
chmod +x ./startsiebel.sh  
./startsiebel.sh
```

4 WebSphere 5.1 Installation Process

This chapter is organized into the following major sections:

- Requirements for Installing the Banking Application on Windows
- Requirements for Installing the Banking Application on Unix
- Deploying the Banking Application on a WebSphere Clustered Environment
- Extracting the Siebel RF Banking Application Files
- Configuring WebSphere Database Settings
- Configuring WebSphere JMS Settings
- Configuring the Properties File
- Installing the SRF Banking Application on WebSphere 5.1

NOTE: Refer to the Siebel Retail Finance System Requirements and Supported Platforms document on the Siebel SupportWeb website (<http://supportweb.siebel.com/>) for information regarding the supported environments, including the supported database and application server versions and supported versions of third party software. Your Siebel TAM will have provided you with a SupportWeb logon.

Requirements for Installing the Banking Application on Windows

This section outlines the installation prerequisites when installing the Siebel Retail Finance Banking Application on Windows. This guide assumes the installation locations listed below; adjust the values in the examples to your machine configuration.

- The target server must be clean, that is, not running any other WebSphere applications, including any previous version of the Siebel Retail Finance Banking Application.
- IBM WebSphere 5.1 must be installed and configured. This guide assumes that the WebSphere root directory is: `D:\Program Files\WebSphere`.
- A database server must be installed and configured; this release supports both DB2 and Oracle. This guide assumes that:
 - DB2 is installed at: `D:\SQLLIB`
 - Oracle is installed at: `D:\Oracle`
- The Java utilities `java`, `javac` and `jar` must be available at the command line.
- This guide assumes that the CD-ROM drive is attached to drive `E:\`; adjust the values in the examples to your machine configuration.
- If interfacing with Siebel Financial Services 7.7 is required an installation of Siebel Financial Services 7.7 is a prerequisite.

Requirements for Installing the Banking Application on Unix

This section outlines the installation prerequisites when installing the Siebel Retail Finance Banking Application on Unix. This guide assumes the installation locations listed below; adjust the values in the examples to your machine configuration.

- The target server must be clean, that is, not running any other WebSphere applications, including any previous version of the Siebel Retail Finance Banking Application.
- IBM WebSphere 5.1 must be installed and configured. This guide assumes that the WebSphere root directory is: `/app/WebSphere`
- A database server must be installed and configured; this release supports DB2 and Oracle. This guide assumes that:
 - DB2 is installed at: `/app/IBMdb2/sqllib`
 - Oracle is installed at: `/opt/oracle/OraHome1`
- The Java utilities `java`, `javac` and `jar` must be available at the command line.
- This guide assumes that the CD-ROM drive is mounted at `/mnt/cdrom`; adjust the values in the examples to your machine configuration.
- If interfacing with Siebel Financial Services 7.7 is required an installation of Siebel Financial Services 7.7 is a prerequisite.

Deploying the Banking Application on a WebSphere Clustered Environment

The steps required for installing the banking application on a clustered environment are the same as those specified in the rest of this document for a non-clustered environment with the exceptions of the steps below. Also for a clustered environment the WebSphere Deployment Manager rather than the WebSphere Admin Console is used for configuring the database and JMS components and deploying the application.

This section includes the following topics:

- Requirements for Deploying the Banking Application on a WebSphere Clustered Environment
- Launching the WebSphere Deployment Manager
- Database and JMS Cluster Settings
- BankframeResource.properties Cluster Settings
- Application Deployment Cluster Settings

Requirements for Deploying the Banking Application on a WebSphere Clustered Environment

This section assumes that the WebSphere clustered environment has been set up and configured.

Consult your vendor's documentation on how to set up and configure a WebSphere clustered environment.

Launching the WebSphere Deployment Manager

The Deployment Manager is used to access each node in the cluster. In a clustered environment the configuration of the database and JMS components and the deployment of the banking application is done through the Deployment Manager.

To launch the Deployment Manager

- 1 Open a web browser and point it to <http://servername:<portnumber>/admin>, where `servername` is the URL/IP address of the machine that WebSphere 5.1 is running on.
- 2 Start the WebSphere application server.

The Login screen is then launched. The User ID field is not part of any authentication mechanism but is used to track user changes, therefore any name will suffice.

Database and JMS Cluster Settings

The database and JMS components should be configured as per the sections 'Configuring WebSphere Database Settings' and 'Configuring WebSphere JMS Settings' with the following exceptions:

- The configuration needs to be done via the Deployment Manager rather than the Admin Console.
- The configuration needs to be done on a per node basis.

BankframeResource.properties Cluster Settings

The BankframeResource.properties file should be configured as per the section 'Configuring the Properties File' with the following exception:

- The `channel.http.client.url=` property should be set to <http://<WebServer-Hostname>:<WebServer-Port-Number>/BankFrameMCA/HttpServer> where `<WebServer-Hostname>` and `<WebServer-Port-Number>` are the hostname and port number of the Http Server. In most cases the port number field can be left blank. Consult the vendor documentation for further information.

Application Deployment Cluster Settings

The deployment settings should be configured as per the section 'Deploying the Banking Application on WebSphere 5.1' with the following exceptions:

- The deployment needs to be done via the Deployment Manager rather than the Admin Console.
- The cluster should be selected for all modules on the Map Modules to Application Settings screen.
- The option 'Synchronizing changes with Nodes' should be checked when saving the changes to the repository.

Extracting the SRF Banking Application Files

The Siebel Retail Finance Banking Application installation files are located in a jar file on the Banking Application CD.

NOTE: All instances of *vx.x* in the instructions in this document should be substituted with the version of the software that you are using.

To extract the Banking Application files on Windows

- 1 Type the command `cd /d d:\`
- 2 Type the following command for Oracle or DB2, as applicable, which will extract the files to a new `siebel` directory on `d:\`
 - a `jar xvf e:\packs\SRFBankingApplication<vx.x>WebSphereOracle.jar`
 - b `jar xvf e:\packs\SRFBankingApplication<vx.x>WebSphereDB2.jar`

To extract the Banking Application files on Unix

- 1 Type the command `cd db.name /app/WebSphere`
- 2 Type the following command for Oracle or DB2, as applicable, which will extract the files to a new `siebel` directory in `/app/WebSphere`
 - a `jar xvf /mnt/cdrom/packs/SRFBankingApplication<vx.x>WebSphereOracle.jar`
 - b `jar xvf /mnt/cdrom/packs/SRFBankingApplication<vx.x>WebSphereDB2.jar`

Configuring WebSphere Database Settings

This section details the SRF-specific procedures required when configuring WebSphere 5.1 for an Oracle or DB2 database server and how to create the required database tables. Some of the sections are specific to Oracle or DB2; ignore the sections that do not apply to your database.

Setting up the Oracle Database

The Oracle database for the Siebel RF Banking Application is provided as an Oracle dump file, as some of the tables contain [RAW](#) data, which cannot be imported via standard SQL insert scripts. To import the data from the dump file into your Oracle database follow the instructions below. In these instructions the existing database is first dropped and then the database is loaded with the contents of the [staging.dmp](#) file located at [\siebel\database\staging.dmp](#). The first time the ant drop or ant load commands are executed the user is asked to supply a database user name, a database password and a database instance or db name. This process creates a [database.properties](#) file at [D:\temp\build_tmp\](#). This [database.properties](#) file determines what database is going to be used by the ant drop and ant load processes. If a different database needs to be used this properties file should be configured accordingly.

In the example below it is assumed that the database name, userid and password are all set to bankfrm. Adjust these values based on the database name, userid, and password you chose in the previous section. The following prerequisites apply for importing the Oracle database:

- The Oracle command line utilities must be available at the command line/console.
- An Oracle database instance must be created (make a note of the name).
- An Oracle user for the database must be created (make a note of the userid and password).
- An entry for the database must be created in the [tnsnames.ora](#) file for the server on which the Siebel Retail Finance Banking Application is to be deployed.

To import the Oracle dump file

- 1 Type the command `cd /d \siebel\database`
- 2 To drop the database if it already exists type the command `ant drop`
- 3 To load the database type the command `ant load`

Errors may occur when importing the dmp file – after the table Utility has been imported. The following ORACLE 942 errors should be ignored:

```
. . importing table          "USER_PREF_DEF_ACCS"          8 rows imported
. . importing table          "UTILITY"                    1 rows imported
IMP-00017: following statement failed with ORACLE error 942:

"CREATE DIMENSION "CUSTOMERS_DIM" LEVEL "CUSTOMER" IS ("CUSTOMERS"."CUST_ID"
") LEVEL "CITY" IS ("CUSTOMERS"."CUST_CITY") LEVEL "STATE" IS ("CUSTOMERS"."
```

```

"CUST_STATE_PROVINCE") LEVEL "COUNTRY" IS ("COUNTRIES"."COUNTRY_ID") LEVEL "
"SUBREGION" IS ("COUNTRIES"."COUNTRY_SUBREGION") LEVEL "REGION" IS ("COUNTRI
"ES"."COUNTRY_REGION") LEVEL "GEOG_TOTAL" IS ("COUNTRIES"."COUNTRY_TOTAL") L
"EVEL "CUST_TOTAL" IS ("CUSTOMERS"."CUST_TOTAL") HIERARCHY "CUST_ROLLUP" ("C
"USTOMER" CHILD OF "CITY" CHILD OF "STATE" CHILD OF "CUST_TOTAL") HIERARCHY "
"GEOG_ROLLUP" ("CUSTOMER" CHILD OF "CITY" CHILD OF "STATE" CHILD OF "COUNTR
"Y" CHILD OF "SUBREGION" CHILD OF "REGION" CHILD OF "GEOG_TOTAL" JOIN KEY ("
"CUSTOMERS"."COUNTRY_ID") REFERENCES "COUNTRY") ATTRIBUTE "CUSTOMER" DETERMI
"NES "CUSTOMERS"."CUST_FIRST_NAME" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMER
"S"."CUST_EMAIL" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_MAIN_PHON
"E_NUMBER" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_POSTAL_CODE" AT
"TRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_STREET_ADDRESS" ATTRIBUTE "
"CUSTOMER" DETERMINES "CUSTOMERS"."CUST_CREDIT_LIMIT" ATTRIBUTE "CUSTOMER" D
"ETERMINES "CUSTOMERS"."CUST_INCOME_LEVEL" ATTRIBUTE "CUSTOMER" DETERMINES "
"CUSTOMERS"."CUST_YEAR_OF_BIRTH" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"
"."CUST_MARITAL_STATUS" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_GE
"NDER" ATTRIBUTE "CUSTOMER" DETERMINES "CUSTOMERS"."CUST_LAST_NAME" ATTRIBUT
"E "CITY" DETERMINES "CUSTOMERS"."CUST_CITY" ATTRIBUTE "STATE" DETERMINES "C
"USTOMERS"."CUST_STATE_PROVINCE" ATTRIBUTE "COUNTRY" DETERMINES "COUNTRIES"."
"COUNTRY_NAME" ATTRIBUTE "SUBREGION" DETERMINES "COUNTRIES"."COUNTRY_SUBREG
"ION" ATTRIBUTE "REGION" DETERMINES "COUNTRIES"."COUNTRY_REGION" ATTRIBUTE "
"GEOG_TOTAL" DETERMINES "COUNTRIES"."COUNTRY_TOTAL" ATTRIBUTE "CUST_TOTAL" D
"ETERMINES "CUSTOMERS"."CUST_TOTAL" "

IMP-00003: ORACLE error 942 encountered

ORA-00942: table or view does not exist

IMP-00017: following statement failed with ORACLE error 942:

```

To reset the Oracle database

- Type the command `ant reset-branches`

Setting up the DB2 Database

The steps below detail how to import the DB2 banking application database tables, create the views and sequences and populate the database tables. The following prerequisites apply for setting up the DB2 database:

- A DB2 instance running on a server.
- Physical access to the console of the server running the DB2 instance.
- The password for the `db2admin` user on Windows or the `db2inst1` user if on UNIX.
- You have created a new operating system user named `BANKFRM` with the password `BANKFRM` and given full administrator rights to this user (refer to your operating system's administration documentation for instructions).
- The file `siebel\deploy\database\SiebelRF-<vx.x>.zip` has been copied to the machine hosting the DB2 database. This file contains an export of all the required banking application database tables.
- The file `siebel\deploy\database\DB2ViewSequenceSyntax.sql` has been copied to the machine hosting the DB2 database. This script is provided to build the banking application database views and sequences.
- There is a database created on this DB2 instance (for example "SiebelRF").

To import the database tables

- 1 Unzip the export zip file `siebel\deploy\database\SiebelRF-<vx.x>.zip` to a folder on the DB2 server machine.
- 2 Open a DOS window, navigate to the unzipped folder and execute the command `db2move <SiebelRF> import -u BANKFRM -p BANKFRM` where `<SiebelRF>` is the database name.

To create the Views and Sequences using an SQL client

- 1 Connect to the database (for example "SiebelRF") as the "bankfrm" user.
- 2 Execute the commands contained in the `siebel\deploy\database\DB2ViewSequenceSyntax.sql` file by copying them into the SQL client command window.

To create the Views and Sequences using the DB2 Command Center application

- 1 Select the Script tab, and then from the menu bar select Script -> Import... to import the `DB2ViewSequenceSyntax.sql` file.
- 2 Click Script -> Execute on the menu bar to load the SQL content of the file into the window and run the file into the database.

To populate the database tables

Execute the files `ACTOR_OR_ACTOR_GROUP_ROLE_transaction_fees.sql` and `TRANSACTION_FEE_transfer_3rd_party.sql` supplied in `siebel\deploy\database\` folder. These scripts

insert the necessary data into the TRANSACTION_FEE, ACTOR_OR_ACTOR_GROUP_ROLE and Routes tables and should be executed as described above for the DB2ViewSequenceSyntax.sql script.

Creating a Connection to the Database

If the database server is not running on the same machine as the WebSphere server then a connection to the database must be configured on the WebSphere Server. The connection must be named `bankfrm`. Consult your database server documentation for information on how to do this.

Starting the WebSphere Application Server

To start WebSphere on Windows

- 1 Click Start > Programs > IBM WebSphere > Application Server v5.1 > First Steps.
- 2 Click Start the Server.

When 'Server server1 open for ebusiness' appears in the log on the bottom of the panel the server has started successfully.

To start WebSphere on Unix

- 1 Go to the root of the server installation, this is typically a folder named WebSphere.
- 2 Enter the bin directory below this and type the command `nohup ./startServer server1 &`

Launching the WebSphere Administration Console

The administration console is the mechanism by which WebSphere defines and configures its properties.

To start the administration console

- 1 Start the WebSphere application server.
- 2 Open a web browser and point it to `http://<servername>:<portnumber>/admin`, where `servername` is the URL/IP address of the machine that WebSphere 5.1 is running on.

The Login screen is then launched. The User ID required is not part of any authentication mechanism and is only used to track user changes, therefore any name will suffice.

Configuring WebSphere's Database Access

The domain configuration must be modified to provide WebSphere with the user credentials associated with the `bankfrm` database. This is done to allow WebSphere access to the Siebel Retail Finance Banking Application database.

Configuring the Database Driver

To configure the Oracle or DB2 database driver

- 1 Log into the WebSphere administration console as detailed above.
- 2 Select [Resources->JDBC Providers](#) from the left side panel.
- 3 On the screen launched select the driver name if it has been created. If a new driver entry needs to be created click the [New](#) button, select [Oracle JDBC Driver](#) or [DB2 Universal JDBC Provider](#) from the drop-down list and select [Apply](#). The configuration screen is then launched.
- 4 Complete the necessary fields for Oracle or DB2, as applicable. Some fields are described in the following table.

Field	Comment
Name	The driver name should be set to Oracle JDBC Driver or DB2 Universal JDBC Provider
Classpath	The classpath to the driver classes is specified by editing the ORACLE_JDBC_DRIVER_PATH variable or the DB2UNIVERSAL_JDBC_DRIVER_PATH variable. This is discussed in the next section.
Implementation class name	This should be set to: oracle.jdbc.pool.OracleConnectionPoolDataSource or COM.IBM.DB2.JCC.db2ConnectionPoolDataSource

- 5 Once the fields have been edited, select the [Apply](#) button to save the information and select [Save](#) on the new screen that is displayed.

Configuring the JDBC Driver Path

Once the database driver has been declared, the path to the driver classes needs to be set. The path is set by configuring the [ORACLE_JDBC_DRIVER_PATH](#) or [DB2UNIVERSAL_JDBC_DRIVER_PATH](#) variable.

To configure the ORACLE or DB2 JDBC driver path

- 1 Navigate to the Environment > Manage WebSphere Variables > [ORACLE_JDBC_DRIVER_PATH](#) or [DB2UNIVERSAL_JDBC_DRIVER_PATH](#) screen.
- 2 Set the Value field to the absolute path of the zip file containing the driver classes. The zip file containing the driver classes is usually called [classes12.zip](#) for Oracle and [db2java.zip](#) for DB2. The path to the zip file is usually [D:\oracle\ora\jdbc\lib](#) for Oracle and [D:\SQLLIB\java](#) for DB2.

Setting Up a Data Source

Now that the database driver has been declared and a path associated with it, a data source must be set up.

To set up an Oracle or DB2 data source

- 1 Navigate to the Resources > JDBC Providers > Oracle JDBC Driver/DB2 Universal JDBC Provider > Data Sources (Version 4) screen.
- 2 Click the New button to create a new data source. The configuration screen is then displayed.
- 3 Complete the necessary fields. Some are described in the following table.

Field	Comment
Name	This field should be set to bankfrm.
JNDI Name	This field should be set to bankfrm.
Database Name	This field should be set to bankfrm.
Default User ID	This field should be set to bankfrm.
Default Password	This field should be set to bankfrm.

- 4 Navigate to the Custom Properties Screen.
- 5 Complete the necessary fields. Some are described in the following table.

Field	Comment
<code>serverName</code>	This field should be set to the IP Address of the database server machine.
<code>portNumber</code>	This field should be set to TCP/IP port number where the DRDA server resides

- 6 Click the URL field on the Custom Properties screen to configure the JDBC URL for Oracle. The URL value will be of the format `jdbc:oracle:thin:@hostname:portnumber:SID`, for example `jdbc:oracle:thin:@database:1521:bankfrm`.

Configuring WebSphere JMS Settings

To configure WebSphere JMS Topic Connection Factories

- 1 Navigate to the Resources > WebSphere JMS Provider > WebSphere Topic Connection Factories > New > Configuration screen.
- 2 Complete the necessary fields. Some are described in the following table.

Field	Comment
-------	---------

Field	Comment
Name	This field should be set to <code>exampleTopicConnectionFactory</code>
JNDI Name	This field should be set to <code>eontec/jms/TopicConnectionFactory</code>
Port	This field should be set to <code>Queued</code>

- 3 Set the XA field to enabled at the bottom of the screen. Save the changes.

To configure WebSphere Topic Destinations

- 4 Navigate to the Resource > WebSphere JMS Provider > WebSphere Topic Destinations > New > General Properties screen.
- 5 Complete the necessary fields. Some are described in the following table.

Field	Comment
Name	This field should be set to <code>exampleTopic</code>
JNDI Name	This field should be set to <code>eontec/jms/exampleTopic</code>
Topic	This field should be set to <code>eontec/jms/exampleTopic</code>

- 6 Save the configuration changes.

To configure the Eontec Listener

- 7 Navigate to the Servers > Application Servers > server1 > Message Listener Service > Listener Ports > New > Configuration screen.
- 8 Complete the necessary fields. Some are described in the following table.

Field	Comment
Name	This field should be set to <code>eontecListener</code>
Initial State	This field should be set to <code>started</code>
Connection Factory JNDI Name	This field should be set to <code>eontec/jms/TopicConnectionFactory</code>
Destination JNDI Name	This field should be set to <code>eontec/jms/exampleTopic</code>

- 9 Save the configuration changes.

Configuring the Properties File

The file `BankframeResource.properties` needs to be configured for local settings before the banking application is uploaded onto the server. The `BankframeResource.properties` file is located in `d:\siebel\deploy\siebel.ear`.

To edit the file *BankframeResource.properties*

- 1 Extract the file `BankframeResource.properties` from `Siebel.ear` and open in a text editor.
 - 2 Search for the string `ejb.server=`. Replace all text to the right of this string with `iiop://localhost` where `localhost` is the machine name, complete with domain suffixes.
 - 3 Search for the string `ejb.initialContextFactory=`. Replace all text to the right of this string with `com.ibm.websphere.naming.WsnInitialContextFactory`, which is the WebSphere-specific context setting for WebSphere versions 4.0 and higher.
 - 4 Search for the string `ejb.jndiSyntax=`. Replace any text to the right of this string with the value `1.1`.
 - 5 Search for the string `ejb.jndiPrefix=`. Make sure that there is no value to the right of this text; it should be blank.
 - 6 Search for the string `channel.http.client.url=`. Replace all text to the right of this string with `http://localhost:9080/BankFrameMCA/HttpServer` where `localhost` is the machine name, complete with domain suffixes.
 - 7 Search for the string `security.provider=`. Make sure that the value to the right of this string is `com.bankframe.util.securityproviders.DelegatingSecurityProvider`.
 - 8 Uncomment/comment the sequence for Oracle/DB2 in the 'Sequence Generation' section, as appropriate. The example below shows the appropriate configuration when the host database is DB2.
- ```
Sequence Generation

Note: keys for sql statements need only be set if you do not wish to use the
 default

(as seen below)

#####

#mca.services.sequences.factoryClass=com.bankframe.services.sequences.OracleSequenceGeneratorFactoryImpl

mca.services.sequences.factoryClass=com.bankframe.services.sequences.DB2SequenceGeneratorFactoryImpl

mca.services.sequences.datasource=bankfrm

#mca.services.sequences.sql.oracle.nextval=SELECT ?.nextval FROM DUAL

mca.services.sequences.sql.db2.nextval=SELECT NEXTVAL FOR ? FROM
SYSIBM.SYSVERSIONS
```
- 9 Save the configuration changes.
  - 10 Right-click on the modified `BankframeResource.properties` file and select Add to Zip.
  - 11 Browse to `siebel.ear` file that `BankframeResource.properties` was extracted from and re-add the modified `BankframeResource.properties` file to the EAR, maintaining the path structure, that is, `\resources\BankframeResource.properties`.

The EAR file is now ready to install on the server.

## Deploying the Banking Application on WebSphere 5.1

This section assumes that the procedures around configuring the WebSphere 5.1 server and setting up and populating the database as outlined in the previous section of this document have been completed and that the WebSphere Web Browser Console is launched.

### *To deploy the Siebel Retail Finance Banking Application on WebSphere 5.1*

- 1 Navigate to the Applications > Enterprise Applications > Install > Preparing for the application installation screen.
- 2 Click on the [Browse...](#) button and select the file [siebel.ear](#) on the local machine.
- 3 Click the [Next](#) button to upload the [siebel.ear](#) file from the local machine to the server, whether it is on a remote machine or on the local machine itself. The AppDeployment Options screen is then displayed.
- 4 Select Next on each of the following nine screens to accept the default settings. The default settings were pre-set when the [Siebel.ear](#) file was uploaded.
- 5 Click Finish and Save to deploy the EAR.
- 6 Navigate to the Applications > Enterprise Applications screen. A list of installed applications is displayed and the [SiebelRF](#) application has a red x to the right of it, signifying that the application is installed but not running.
- 7 Click the check-box to the left of the [SiebelRF](#) application and click the [Start](#) button. Save the changes.
- 8 Navigate to the Applications > Enterprise Applications screen. A list of installed applications is displayed and the [SiebelRF](#) application has a green arrow to the right of it, signifying that the application is installed and running.





# 5

## Peripheral Devices Support

### Enabling Peripheral Devices Functionality

Support for peripheral devices connected to RS232 serial ports and IEEE 1284 parallel ports is provided through the Java Communications API. This third party software must be downloaded and installed following the instructions below if peripheral devices are to be used in your Banking Application installation.

#### *To install the Java Communications API*

- 1 Open the URL <http://java.sun.com/products/javacomm/downloads/index.html> to download the Java Communications API.
- 2 Select Version 2.0 for Microsoft Windows and Solaris/x86 package.
- 3 Accept the license agreement prompt and select the javacomm20-win32.zip URL.
- 4 Save the zip file to a temporary folder, for example, c:\temp.
- 5 Extract the contents of javacomm20-win32.zip to the temporary folder.

#### *To enable devices in the deployed application using the Java Communications API extension*

- 1 Add the downloaded file win32com.dll into a jar file and name the jar win32com.jar.
- 2 Copy the files comm.jar and win32com.jar to the location of the exploded branchteller.war Web application which has been installed as part of the Banking Application installation, as described in the previous sections. The typical Windows and Unix locations of the branchteller.war file are listed below.

The Windows location of `branchteller.war` is typically:

`{WebsphereInstallationRoot}\installedApps\machinename\siebel.ear\branchteller.war`

The Unix location of `branchteller.war` is typically:

`/app/WebSphere/AppServer/installedApps/machinename/siebel.ear/branchteller.war`

where `machinename` is the name of the machine where the WebSphere server is installed.



# 6 Launching the Banking Applications

## Launching the Branch Teller Application

### Prerequisites

- Sun J2SE 1.4.2 JRE has been installed on the Branch Teller client machine(s)
- The Siebel Retail Finance Banking Application and supports supplied in this release have been deployed as per the instructions in this document
- The application server and the application ([siebel.ear](#)) have been started successfully.

### Launching the Application

The URLs below can be used to access the Branch Teller client and Branch Teller Administration Console functionality contained in the Siebel Retail Finance Banking Application once this has been deployed:

<http://servername:port/branchteller>

<http://servername:port/branchadmin>

where [servername](#) is the name of the server the Siebel Retail Finance Banking Application has been deployed and [port](#) is the port that the application server is listening on (typically 9080 for WebSphere and 7001 for WebLogic).

### Running Entitlements & MCA Services administration services

The URLs below can be used to access the Entitlements & MCA Services administration functionality contained in the Siebel Retail Finance Banking Application:

- <http://servername:port/Entitlements/StateMachine> The Entitlements administration tool
- <http://servername:port/BankFrameMCA/ServiceServlet> MCA Services administration

where [servername](#) is the name of the server the Siebel Retail Finance Banking Application has been deployed and [port](#) is the port that the application server is listening on (typically 9080 for WebSphere and 7001 for WebLogic).

## Sample Branch Teller/Entitlements logons

Logons contained in the sample data contained in the <vx.x> release of the Banking Application include:

| Name           | Logon Name | Password  | Branch     | User Type     | User ID                 | Privileges/<br>Actor Group                           |
|----------------|------------|-----------|------------|---------------|-------------------------|------------------------------------------------------|
| Peter Foley    | pfoley     | pfoley    | 9000000000 | Administrator | 0000000<br>0000200<br>1 | Central Administrator                                |
| Karen Saunders | ksaunders  | ksaunders | 9000000001 | Administrator | 0000000<br>0000003<br>7 | Central Administrator,<br>Entitlements Administrator |
| Karen Marino   | kmarino    | kmarino   | 9000000001 | Teller        | 0000000<br>0000152<br>9 | Teller                                               |
| Susan Drew     | sdrew      | sdrew     | 9000000001 | Teller        | 0000000<br>0000153<br>0 | Senior Teller                                        |
| David Reid     | dreid      | dreid     | 9000000001 | Supervisor    | 0000000<br>0000152<br>7 | Supervisor                                           |

## Launching the Internet Banking Application

### Prerequisites

This section assumes that the Siebel Retail Finance Banking Application and supports supplied in this release have been deployed as per the instructions in this document, and that the application server and the application ([siebel.ear](#)) have been started successfully.

### Launching the Application

You can use these URLs to access the functionality contained in a deployed Internet Banking application:

- <http://servername:port/internetbanking/StateMachine> - the Internet Banking functionality
- <http://servername:port/onlineereg/StateMachine> - the Online Registration functionality

where `servername` is the name of the server where Siebel Retail Finance Banking Application has been deployed and `port` is the port on which the application server is listening.

## Sample Internet Banking/Entitlements Account Data

### Administrator Data

The following administrator accounts have been set up in the default data that is shipped with the Banking Application

| Name           | Logon Name | Password  | Branch     | User Type     | User ID          | Privileges/Actor Groups |
|----------------|------------|-----------|------------|---------------|------------------|-------------------------|
| Peter Foley    | pfoley     | pfoley    | 9000000000 | Administrator | 0000000000002001 | Central Administrator   |
| Karen Saunders | ksaunders  | ksaunders | 9000000001 | Administrator | 0000000000000037 | Central Administrator   |

### Unregistered Customer Data

The following sample data shipped with the Banking Application can be used to register customers for the Internet Banking service

| Owner Id         | First Name | Surname | Branch Code | Account No. | Services Value                                                                                                                    |
|------------------|------------|---------|-------------|-------------|-----------------------------------------------------------------------------------------------------------------------------------|
| 1000000000000222 | Felix      | Aaron   | 9000000002  | 5000000127  | ATM, 4600 0000 0000 0122, PIN 4575                                                                                                |
| 1000000000000226 | Diana      | Abbot   | 9000000001  | 5000000120  | ATM, 4600 0000 0000 0115, PIN 8944                                                                                                |
| 1000000000000229 | George     | Abby    | 9000000001  | 5000000122  | ATM, 4600 0000 0000 0118, PIN 7040<br>Check Guarantee, 4600 0000 0000 0119, PIN 7090<br>Debit Card, 4600 0000 0000 0120, PIN 4766 |



# 7

## Installing the Branch Offline Server

### Installation Prerequisites

- The Branch Teller Application (“Central Server”) is running (the EAR file for the Banking Application has been deployed successfully).
- The Windows platform machine, where Branch Offline is to be installed, has its hard drive partitioned as c: (primary hard drive) and d: (logical hard drive) in the extended partition.

### Installation Process

#### Extracting the Branch Offline Server Files

The Branch Offline Server can be found on the Banking Application CD for each application server/database platform in a file called [BranchOfflineServer.zip](#). Within this zip file there are two further zips—[SybaseSQLAnywhere.zip](#) and [BranchServer.zip](#). Extracting [SybaseSQLAnywhere.zip](#) installs a lightweight server version of Sybase SQL Anywhere. The file [BranchServer.zip](#) contains the database [\BranchServer\Offline\data\OfflineDB.db](#) which is a blank database file containing only the required schema details for offline processing.

##### *To extract the Branch Offline Server Files*

- 1 Extract [BranchServer.zip](#) from [BranchOfflineServer.zip](#) to the root of your [d:\](#) drive.
- 2 Extract [SybaseSQLAnywhere.zip](#) from [BranchOfflineServer.zip](#) to the root of your [d:\](#) drive.

You will now have two new folders—[d:\BranchServer](#) and [d:\SybaseSQLAnywhere](#).

#### Setting up the Database

By default the [d:\BranchServer\resources\Offline.properties](#) are set to find the database in [d:\BranchServer\Offline\data\OfflineDB.db](#).

If this is not the location of your database you must edit this property.

#### Configuring the Branch Offline Server

Edit the [BranchServer\resources\BankframeResource.properties](#) file to point to your central application server as follows:

Open `d:\Branchserver\resources\BankframeResource.properties` and edit as follows.

Find the following section and update the `channel.http.client.url` to point to your online application server as shown below.

```
#####
URL of the Channel Server to communicate with
Possible values are:
http://localhost:7001/HttpServer (WebLogic 5.1)
http://localhost/HttpServer (WebSphere 3.5)
http://localhost:7001/BankFrameMCA/HttpServer (WebLogic6.1)
http://localhost/BankFrameMCA/HttpServer (WebSphere 4.0)1
channel.http.client.url=http://
YourCentralServer'sIPAddress:YourCentralServer'sPortNumber/BankFrameMCA/HttpServer
```

Save the changes to `BankFrameResource.properties`

## Configuring run.bat

`D:\BranchServer\run.bat` has to be configured to point to your `JAVA_HOME` (example: `set JAVA_HOME=D:\java\j2sdk1.4.2_04`).

Ensure that the `Sybase_Home` is pointing to the correct location.

Save `run.bat`.

Open a command prompt and change directory into the location of your `run.bat`, typically `d:\BranchServer`.

`Run.bat` takes in two arguments for the Sybase DB: username and password.

The default values are `dba` and `sql`.

Type: **"run dba sql"** (at command line) and hit "Enter" to start your branch server and offline database server.

The Offline server is now running.

## Running Branch Offline

Once both the Central Server and the Branch Offline Server are running, launch the Branch Teller Application.

---

<sup>1</sup> NB\* For WebSphere you only require the following change: `channel.http.client.url=http://YourCentralServer'sIPAddress/BankFrameMCA/HttpServer`.



You must carry out the following operation for your supervisor and teller users:

A Branch Start of Day must be performed, as this will update `OfflineDB.db` with all the required data, including transaction fees data.

Branch Start of Day is only required to be carried out once online. After that it can be done offline. After each user has logged in online once, he or she can then log on in offline mode.

The Branch will run in offline mode under the following circumstances:

- The application server can be brought down.
- The connection between the application server and the branch offline server can be severed (pull the network cable to test).
- The `OfflineTest` file is modified – this enables a switch to offline mode even when application server is running. The location of the `OfflineTest` file is specified by the value of the – `Offline.helper.test.file` setting in the offline `run.bat` file, the default location is `C:\`. Modifying the online/offline setting will enable testing to switch between online and offline mode without shutting down the application server.

The `OfflineTest` file has two entries:

```
com.siebel.rf.offline.ei.channel.client.AlwaysOfflineClient
#com.siebel.rf.webstart.client.WebStartChannelClient
```

You can switch between online/offline modes by swapping the comment (#) at the start of the applicable line. The above configuration will result in an offline response.



# 8

## Siebel Retail Finance Integration with Siebel 7.7

### Integration Prerequisites

If the integration of Branch Teller with the Siebel Financial Services 7.7 is required then an installation and configuration of the Siebel Financial Services 7.7 application is required. Please refer to the Siebel documentation available on Siebel SupportWeb for more information on this configuration.

Some software resources are required for this configuration and these configuration resources can be found in a file called [SiebelTCRCIntegrationConfigurationResources.jar](#) on the Banking Application CD for each application server/database platform supported in this release.

### Configuring the Database for Integration with Siebel Financial Services

In order for the Siebel Retail Finance Banking Application to be integrated fully with Siebel Financial Services 7.7, it needs to be configured with the location of the machine on which the Siebel Financial Services 7.7 Application Server is hosted.

You do this by modifying the CONNECTOR\_PROPERTIES column in the DESTINATION table.

The Siebel Financial Services integration related DESTINATION\_IDs in the DESTINATION table correspond to the following CRC (Customer Relationship Console) processes:

| DESTINATION_ID | CRC Process Description                                                                                                                                  |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| CRC001         | Get the initial contact Summary Info from Siebel. This includes Customer Summary/Offers/Alert.                                                           |
| CRC002         | Get the list of offers for a contact from Siebel. This is used to pull the Offers for a contact after a reject or accept execution on a displayed offer. |
| CRC003         | Get the Referrals records from Siebel.                                                                                                                   |
| CRC004         | Create a Referral record in Siebel.                                                                                                                      |
| CRC005         | Create a Response Record in Siebel.                                                                                                                      |

In the DESTINATION table "CONNECTOR\_PROPERTIES" column, replace the string represented by "{SIEBEL\_HOST}" below with the IP Address or machine name (complete with domain suffixes) of the machine hosting the Siebel Financial Services 7.7 Application Server with which you wish to integrate.

At run-time the strings \${CRCUserName} and \${CRCPassword} are dynamically replaced with the teller login user name and password.

| DESTINATION_ID | CONNECTOR_FACTORY_CLASSNAME                                      | CONNECTOR_PROPERTIES                                                                                                                                                      | HOST_STATUS | IS_EAB |
|----------------|------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------|
| CRC001         | com.bankframe.ei.txnhandler.connector.http.HTTPConnectionFactory | URL_STRING-<br>http://{SIEBEL_HOST}/eai_enu/start.sw<br>e?SWEEExtCmd=Execute&SWEEExtSource=TCRCQueryContact&UserName=\${CRCUserName}&Password=\${CRCPass<br>word}         | ON_LINE     | False  |
| CRC002         | com.bankframe.ei.txnhandler.connector.http.HTTPConnectionFactory | URL_STRING-<br>http://{SIEBEL_HOST}/eai_enu/start.sw<br>e?SWEEExtCmd=Execute&SWEEExtSource=TCRCQueryOffer&Us<br>erName=\${CRCUserName}&Password=\${CRCPass<br>word}       | ON_LINE     | False  |
| CRC003         | com.bankframe.ei.txnhandler.connector.http.HTTPConnectionFactory | URL_STRING-<br>http://{SIEBEL_HOST}/eai_enu/start.sw<br>e?SWEEExtCmd=Execute&SWEEExtSource=TCRCQueryOpportun<br>ity&UserName=\${CRCUserName}&Passw<br>ord=\${CRCPassword} | ON_LINE     | False  |
| CRC004         | com.bankframe.ei.txnhandler.connector.http.HTTPConnectionFactory | URL_STRING-<br>http://{SIEBEL_HOST}/eai_enu/start.sw<br>e?SWEEExtCmd=Execute&SWEEExtSource=TCRCInsertReferral&<br>UserName=\${CRCUserName}&Password<br>=\${CRCPassword}   | ON_LINE     | False  |
| CRC005         | com.bankframe.ei.txnhandler.connector.http.HTTPConnectionFactory | URL_STRING-<br>http://{SIEBEL_HOST}/eai_enu/start.sw<br>e?SWEEExtCmd=Execute&SWEEExtSource=TCRCInsertResponse<br>&UserName=\${CRCUserName}&Passwor                        | ON_LINE     | False  |

| DESTINATION_ID | CONNECTOR_FACTORY_CLASSNAME | CONNECTOR_PROPERTIES | HOST_STATUS | IS_EAB |
|----------------|-----------------------------|----------------------|-------------|--------|
|                |                             | d=\${CRCPassword}    |             |        |

The Siebel Retail Finance Banking Application is now configured for integration with the Siebel Financial Services 7.7 Application Server.