Neo Financier Client

Environment

Version 1.0

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Version** | **Description** | **Author** |
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|  |  |  |  |

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# Serverless Stack

## Documentation on creating ReactJS app on AWS from beginning

<https://serverless-stack.com/>

### Create a New React.js App section

Follow instructions in this section.

## Documentation on creating Neo Financier on AWS

MCM – Moneris Conversion Manager

## References

“Moneris Conversion Manager – Analysis Design Specification”

MCM Functions and Stored Procedures in CVS under “MonerisConversionManager/Design Document/SQL Scripts”

## Overview

The Operations Manual provides the reader with sufficient information, which is necessary to support Moneris Conversion Manager.

The document describes responsibilities of various groups that collectively provide an overall support MCM, describes operational environment, provides problem resolution procedures and provides a list of contacts within specific support level.

# Operational Responsibilities

## DBA Support

* Support ConversionManager and ConversionInterface databases, i.e. installation, security, backups.
* Support connectivity between MCM database and MIS database, required for retrieval of Host data.
* Respond to problems reported by Technical Analyst.
* Contribute to troubleshooting service-affecting problems or issues.

## OSS Support

* Support TMS server, which hosts MCM.
* Maintain connectivity between Technical Analyst’ SQL Query Analyzer and MCM database.
* Respond to problems reported by Technical Analyst.
* Contribute to troubleshooting service-affecting problems or issues.

# System Architecture

The System Architecture described in this section refers to the “Moneris Conversion Manager” hosted on MCM server.

## System Overview

The software architecture required for planning, scheduling and delivering Conversion Orders between Moneris Conversion Manager and OMS is depicted in the following diagram.

The Technical Analyst, with the assistance from Terminal Management Services (TMS) staff will use the data retrieved from various sources and available via MCM database on TMS server at Q9 for the purpose of planning Merchant Conversions. Once the decision is reached on which Merchants will be associated with specific Conversion Order, the Technical Analyst will schedule the Conversion Order. The process of scheduling Conversion Order involves setting effective date for the Conversion Order, collecting data from various MCM database tables and copying Conversion Order data to Conversion Interface database. All Conversion Order data is validated against basic data validation rules, such as data type and data length. Conversion Order data copied to Conversion Interface database is immediately available for retrieval.

OMS User will sign on to OMS and via a GUI schedule Conversion Order retrieval to transfer available Conversion Orders between MCM and OMS. The retrieval of available Conversion Orders will be scheduled for off-hours, but prior to MRE nightly scheduled retrieval of OMS data currently scheduled for midnight. At the scheduled time, OMS will begin retrieving all available Conversion Orders from Conversion Interface database on TMS server at Q9 and store them in Conversion Staging tables in Conversion database on OMS database server. All retrieved Conversion Orders will be then deleted from Conversion Interface database. Finally, OMS will copy validated Conversion Orders stored in the Conversion staging DB tables to Conversion database tables and set status for each retrieved Conversion Order. Note: Status is required for all valid and invalid Conversion Orders.



## Software Components

Not Applicable

## Database

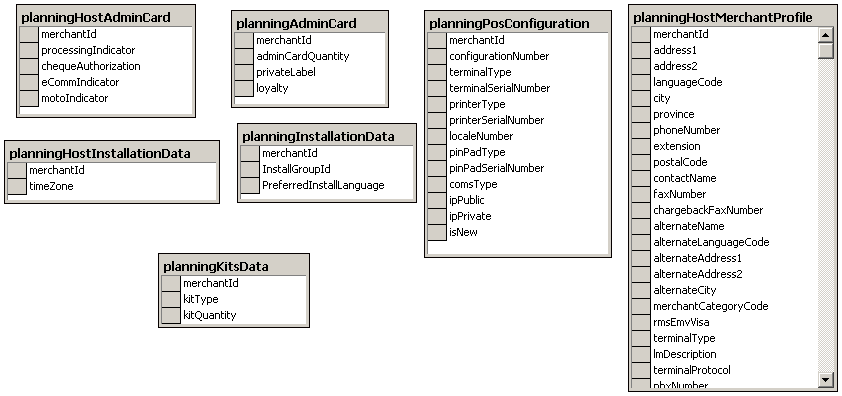
The MCM Data Model comprises two databases: ConversionManager and ConversionInterface. The ConversionManager database is used for planning, scheduling and monitoring of EMV Conversions, whereas ConversionInterface database is used only for transferring data between MCM and OMS. Scheduled Conversion Orders are copied from ConversionManger database to ConversionInterface database to corresponding database tables for retrieval by OMS.

### Conversion Manager database

The ConversionManager database schema has three categories of data tables: planning, conversion and lists. Planning tables are used for holding Host data retrieved from MIS databases or populated by Technical Analyst. Conversion tables hold data associated with Conversion Orders. List tables hold Merchant Id lists required for retrieving Host data from MIS databases or for creating Conversion Orders.

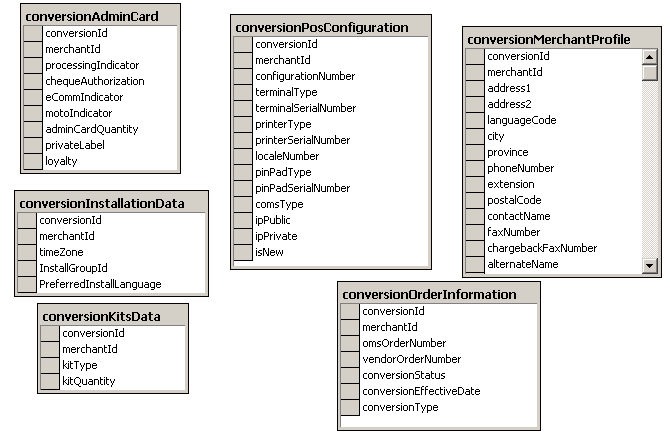
#### Planning Tables

The Planning tables – refer to the diagram below – hold the data used in the Conversion planning process. Planning tables with “Host” in the name of the table hold Host data retrieved from MIS databases.



#### Conversion Tables

The following diagram shows Conversion Tables, which hold Conversion Order data with conversionId and merchantId as primary keys.



# System Operational Environment

## Environment Overview

The following diagram depicts the source of data for each database table required for Planning, Scheduling and Monitoring Conversion Orders. The data elements are listed in each database table.

The Conversion process begins with Moneris staff selecting Merchants for Conversion on the Host. In the Conversion Planning phase, the Technical Analyst will use MCM to retrieve a list of MerchantIds from MIS tables, which correspond to the Merchants selected by Moneris staff for Conversion on the Host. The retrieved MerchantIds will be stored in the “TargetMerchantList” database table. In Conversion Planning phase, the Technical Analyst will be required to retrieve Host data associated with Merchants selected for Conversion into “PlanningHostTables” and enter data into “PlanningTables”. MCM allows retrieval of Host data, based on a list of MerchantIds in “TargetMerchantList”, which can be obtained from the Host – selected Merchants for Conversion – or from another database table with MerchantIds. The Technical Analyst is expected to enter the Conversion data into “PlanningTables” for selected MerchantIds for which the data has already been retrieved from the Host via MIS database tables.

The Conversion Scheduling phase begins when the Technical Analyst has a clear idea on how Merchants will be grouped into Conversion Orders and when each Merchant will undergo Conversion. The Technical Analyst will enter a list of MerchantIds with “ConversionType” and “ConversionEffectiveDate” into database table “ForConversionMerchantList”. This list of MerchantIds must correspond to the MerchantIds in “HostPlanningTables” and “PlanningTables”. Finally, the Technical Analyst can create a Conversion Order for all Merchants listed in “ForConversionMerchantList”. The MCM validate the data for the Conversion Order and if valid, it will display the Conversion Order Id. The data from “HostPlanningTables” and “PlanningTables” is copied to corresponding ConversionTables, when Conversion Order is created. ConversionTables maintain the history of Conversion Orders. Then, at the discretion of Technical Analyst, after final validation of data in ConversionTables, the Technical Analyst will Schedule the Conversion Order – the Conversion Order with a given Conversion Order Id will be made available for retrieval by OMS. During this final step in the Conversion Scheduling process, all Conversion Order data is copied from ConversionTables to ConversionInterfaceTables in ConversionInterface database – OMS can only access ConversionInterfaceTables database.

The Conversion Monitoring phase begins after the Conversion Order has been scheduled and OMS has retrieved it. Following the retrieval of Conversion Order by OMS, the OMS processes the Conversion Order and sets appropriate status – accepted or rejected – in OMS database. The Technical Analyst can pull a report from MRE, which get the Conversion Order status overnight from OMS, and update the status of Scheduled Conversion Order in the MCM.



## Operational period

The Moneris Conversion Manager is expected to be operational in the following period:

* 6:00 – 23:00 hours on business days

## Hardware Components

* TMS server – Windows 2003 Server

## Network Topology/Interfaces

### Host Data 🡪 MCM

Host data required by the MCM will be obtained directly from MIS’ database tables using SQL Server link between SQL Client on TMS Server and SQL Server on MIS SQL Server.



### MCM Conversion data 🡪 OMS

OMS will pull all Conversion Orders from Conversion Interface database on TMS server at Q9. MCM will insert Conversion Orders into Conversion Interface database tables for subsequent retrieval by OMS. OMS is responsible for removing retrieved Conversion Orders from Conversion Interface database tables.



### OMS Status data 🡪 MCM

Conversion Order Status obtained from OMS database via MRE in the form of scheduled reports stored as CSV files will be imported into MCM database using Import data Utility.



## Security

The user access to MCM is restricted to database accounts listed in section 7.5.1 via SQL Query Analyzer installed on user’s workstation. OMS uses database user id to access MCM database – see section 7.5.1 – to retrieve Conversion Orders. MCM uses database user id to access MIS database to retrieve Host data – see section 7.6.

Since data in MCM is classified as “Confidential”, all users are required to follow Moneris Security Guidelines while handling this data.

Moneris System Admin and DBA is required to set security measures in MCM in compliance with appropriate Moneris Security Guidelines.

# System Administration

## Application Procedures

Not Applicable

## Database Procedures

### DBA

The MCM is a simple database application that requires minimum support from DBA. The DBA is expected to perform the following functions:

* Install ConversionManager database – see section 7.4.1.
* Install ConversionInterface database – see section 7.4.2.
* Configure ConversionManager and ConversionInterface databases – see section 7.5.
* Link MCM database with MIS database and ensure the MCM has required table permission on MIS database tables – see section 7.6.
* Daily differential backup of ConversionManager database.
* Monthly full backup of ConversionManager database.

### OSS Application Support

The OSS Application Support is expected to perform the following functions:

* Ensure OMS application can access MCM’s ConversionManager database.
* Assist Technical Analyst in maintaining ConversionManager database data
* Assist Technical Analysts in troubleshooting Conversion-related issues.
* If required, correct Conversion data in ConversionManager or ConversionInterface databases to maintain Conversion data integrity.

## Hardware Procedures

Not Applicable

## Network Procedures

Any changes to the network topology affecting database connectivity between TMS server, OMS Application server and MIS database server must follow System Change Document (SCD) procedures described on Monet.

## Security Procedures

The database password Management must be performed according to “Moneris Password Guidelines” described in the “Moneris Information Security Policy” published on Monet.

# Problem Resolution Procedures

Resolution procedures described in the following sections refer to functional roles defined in each organization that may be involved in the resolution process. The functional role hierarchy is described in section 7.1, while the corresponding contact information is contained in section 7.2. The hierarchy illustrates communication channels that can be established between various functional roles during problem resolution and for problem escalation. Establishing new communication channels between functional roles is prohibited.

## Problem Resolution timeframe

All reported problems related to the Moneris Conversion Manager are expected to be resolved within 24 business hours. The Contingency Plan can be invoked in the event the MCM is not operational within 24 hours.

## Application

Not Applicable

## Database

### Technical Analyst unable to connect to MCM database

SQL Query Analyzer may return an error message when the Technical Analyst attempts to connect to MCM database. The SQL error message may indicate that the database does not exist or is unable to connect to it with user credentials. Below is the suggested resolution procedure for resolving this problem:

1. Validate and re-enter user credentials when connecting to MCM database.
2. Run “telnet tmsServerIp 1433”, where tmsServerIp is the IP address of the TMS server. If the telnet command times out, there is problem with network connectivity to TMS server or the TMS server is down.
3. Check database Technical Analyst credentials and permissions on the MCM database. Correct any issues and attempt to connect to the MCM database.

### Unable to retrieve Merchant List from MIS database table

SQL Server may return a SQL error message when the Technical Analyst executes MCM Function “getTargetMerchantList”. The SQL error message may indicate that the database does not exist or SQL Analyzer may not be able to connect to it. Below is the suggested resolution procedure for resolving this problem:

1. Run “Execute sp\_linkedservers” function in SQL Query Analyzer and compare the output against the entry in the table below. If “misB24” appears in “SRV\_NAME” column and the correct IP address of the MIS database appears in the “SRV\_DATASOURCE”, then go to step 2. Otherwise request DBA to execute “MCM/ initializeConversionDatabase”, which will link MCM database and MIS database. Run MCM Function “getTargetMerchantList”to verify if the problem has been resolved.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| SRV\_NAME | SRV\_PROVIDERNAME | SRV\_PRODUCT | SRV\_DATASOURCE |  |  |  |
| misB24 | SQLOLEDB |  | 216.220.50.195 | NULL | NULL | NULL |

1. Verify database connectivity between MCM database and the MIS database through the firewalls. If the test is positive then check if database user permissions on MIS database have changed – refer to section 7.6.

### Unable to retrieve Host Data from MIS database table

SQL Server may return a SQL error message when the Technical Analyst executes MCM Function “getFromHostAllData”. The SQL error message may indicate that the database does not exist or SQL Analyzer may not be able to connect to it. Suggested resolution procedure for resolving this problem is similar to the one described in section 6.3.1.

### OMS is unable to retrieve Conversion data from ConversionInterface database

OMS indicates that error occurred while attempting to retrieve Conversion data from the ConversionInterface database. Below is the suggested resolution procedure for resolving this problem:

1. Verify database connectivity via firewalls in the network between OMS Application server and TMS server. If database connectivity exists, then go to step 2.
2. Verify permissions given to OMS Stored Procedures in ConversionInterface database for OMS database userId, see section 7.5.2. Install OMS Stored Procedures in ConversionInterface database in the event they are missing.

## Hardware

Not Applicable

## Network

Not Applicable

# Appendix

## Escalation hierarchy



## Escalation Contact list

| **Support Level** | **Support Group Name** | **Support Group Member Name** | **Contact Details** | **Hours of Support (EST)** |
| --- | --- | --- | --- | --- |
| 1st level | Technical Analyst |  | Phone:  Cell: | 9:00–17:00 |
| OSS Application Support | Ye Zhou | Phone: (416) 734-1837  Cell: (416) 817-8328 | 7x24 |
| Siby Thomas | Phone: (416) 734-1829  Cell: (647) 293-8386 | 7x24 |
| Technical Services | Dave Liu | Phone: (416) 734-1174  Cell: | 9:00–17:00 |
| Vivien Xing | Phone: (416) 734-1829  Cell: (416) 277-1053 | 7x24 |
| 2nd level | Manager Application Support | Ken Cheung | Phone: (416) 734-1889 | 9:00–17:00 |
| Manager Technical Services | Dinesh Sanil | Phone: (416) 734-1086  Cell: (416) 277-2647 | 9:00–17:00 |
| 3rd level | Business Owner | Sandra Jameson | Phone: (416) 734-1090 | 9:00–17:00 |
| 4th level | Senior Manager Application Support | Mike Zoratti | Phone: (416) 734-1109 | 9:00–17:00 |
| 5th level | SVP Operations | Jeff Guthrie | Phone: (416) 734-1281 | 9:00–17:00 |

## Warnings and Error codes

### Application

Not Applicable

### Database

MCM may issue the following errors when creating a Conversion Order:

* “Error: value of conversionEffectiveDate data element must be greater than the current date” – The effective date for one of the MerchantIds in “ForConversionMerchantList” has a date that is either today or in the past instead of the future date greater than today.
* “Error: Tables: planningHostMerchantProfile, planningAdminCard and planningInstallationData must have the same number of Merchant Ids” – When creating a Conversion Order, MCM requires that a list of MerchantId in the mentioned tables must be the same as in the list provided in “ForConversionMerchantList” table.
* Various error, such as “Error: Admin Card Table must have adminCardQuantity > 0 and both privateLabel/loyalty = {Y, N}”, used for validating data in planning tables data fields.

### Hardware

Not Applicable

## MCM Installation procedure

The following installation procedure will create required databases, respective database tables and install all stored procedures required for MCM.

### Install ConversionManager

1. Create “ConversionManager” database.
2. Install stored procedures:
   1. “Stored Procedures\MCM\ createConversionTables”
   2. “Stored Procedures\MCM\ createPlanningTables”
3. Run MCM Functions, which will create ConversionManager database tables:
   1. “Functions\MCM\ createConversionTables”
   2. “Functions\MCM\ createPlanningTables”

### Install ConversionInterface

1. Create “ConversionInterface” database.
2. Install stored procedures:
   1. “Stored Procedures\MCM\ createConversionTables”
   2. “Stored Procedures\OMS\ MCM\_retriveOrderConversionIds”
   3. “Stored Procedures\OMS\ MCM\_retriveOrderConversion”
   4. “Stored Procedures\OMS\ MCM\_ removeOrderConversionById”
3. Run MCM Function, which will create ConversionInterface database tables:
   1. “Functions\MCM\ createConversionInterfaceTables”

## MCM Configuration

The DBA is required to configure MCM prior to its usage.

### Database accounts

The following table lists database userids on MCM

|  |  |
| --- | --- |
| **Database Userid** | **Purpose** |
| omsserver | OMS will log in to MCM’s SQL ConversionInterface database to retrieve Conversion Orders. |
| mcmadmin | User in the role of OSS Application Support will be allowed to create and modify database tables and stored procedure. |
| mcmta | User in the role of Technical Analyst will be allowed to run functions (SQL scripts), which access privileged stored procedures to retrieve data for planning Conversions, which is eventually used to create Conversion Orders without the permission to modify the data. |

### Permissions

The following sections describe permissions for stored procedures, databases and database tables for database accounts – see section 0.

#### Stored Procedures

MCM uses SQL scripts, which provide all the functionality required to plan, schedule and monitor Conversions. While performing previously mentioned business function, the Technical Analyst executes Functions – SQL scripts –, which call corresponding Stored Procedures. All stored procedures are installed by the DBA. The DBA is required to run a Function “MCM\ initializeConversionDatabase” to create a link between ConversionManager and MIS database to allow MCM to retrieve Host Data from MIS databases. Only the DBA can successfully execute this Function because execution of the embedded SQL functions in this MCM Function for linking databases are restricted to DBA.

The following table shows permissions for database accounts required for all stored procedures. MCM has divided stored procedures in categories, which relate to the specific business function when they are used. Thus, “MCM\createConversionInterfaceTables” shows that “createConversionInterfaceTables” stored procedure is in the “MCM” category, which has several stored procedures required for managing the MCM. Other categories: “Host Data” is associated with obtaining data from MIS databases, “Planning “ is associated with planning Conversions, “Scheduling” is associated with scheduling Conversion Orders for retrieval by OMS and “Monitoring” is associated with monitoring and updating status of Conversion Orders. The stored procedures with OMS in parenthesis are provided by OMS for the purpose of managing the retrieval of Conversion Orders by OMS from MCM.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Database** | **Stored Procedure** | **mcmadmin** | **mcmta** | **omsserver** |
| ConversionInterfaceManager | MCM\createConversionInterfaceTables |  |  |  |
| ConversionManager | MCM\ createConversionTables |  |  |  |
| ConversionManager | MCM\ createPlanningTables |  |  |  |
| ConversionManager | Host Data\ createTargetMerchantList | exec | exec |  |
| ConversionManager | Host Data\ getFromHostAdminCardByMerchant | exec | exec |  |
| ConversionManager | Host Data\ getFromHostInstallationDataByMerchant | exec | exec |  |
| ConversionManager | Host Data\ getFromHostMerchantProfileByMerchant | exec | exec |  |
| ConversionManager | Host Data\ getFromHostPosConfigurationByMerchant | exec | exec |  |
| ConversionManager | Planning\createConversionOrder | exec | exec |  |
| ConversionManager | Scheduling\scheduleConversionOrder | exec | exec |  |
| ConversionManager | Monitoring\updateConversionOrderStatus | exec | exec |  |
| ConversionInterfaceManager | OMS\MCM\_retriveOrderConversionIds | exec |  | exec |
| ConversionInterfaceManager | OMS\MCM\_retriveOrderConversion | exec |  | exec |
| ConversionInterfaceManager | OMS\MCM\_removeOrderConversionById | exec |  | exec |

#### Databases

The following table shows permissions required by database users for specific databases.

|  |  |  |  |
| --- | --- | --- | --- |
| **Database** | **mcmadmin** | **mcmta** | **omsserver** |
| ConversionInterfaceManager |  |  |  |
| ConversionManager | Create Table, Create Stored Procedure | Create Table |  |

#### Database tables

The following table shows permissions required by database users for tables in specific databases, where ‘S’ is Select, ‘I’ is for Insert, ‘U’ is for Update and ‘D’ is for Delete.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Database** | **Table** | **mcmadmin** | **mcmta** | **omsserver** |
| ConversionInterfaceManager | AdminCard | S, I, U, D | S | S, D |
| ConversionInterfaceManager | HostData | S, I, U, D | S | S, D |
| ConversionInterfaceManager | InstallationInformation | S, I, U, D | S | S, D |
| ConversionInterfaceManager | KitsInformation | S, I, U, D | S | S, D |
| ConversionInterfaceManager | OrderInformation | S, I, U, D | S | S, D |
| ConversionInterfaceManager | PosConfiguration | S, I, U, D | S | S, D |
| ConversionManager | planningAdminCard | S, I, U, D | S, I, U, D |  |
| ConversionManager | planningHostAdminCard | S | S |  |
| ConversionManager | planningHostInstallationData | S | S |  |
| ConversionManager | planningHostMerchantProfile | S | S |  |
| ConversionManager | planningInstallationData | S, I, U, D | S, I, U, D |  |
| ConversionManager | planningKitsData | S, I, U, D | S, I, U, D |  |
| ConversionManager | planningPosConfiguration | S, I, U, D | S, I, U, D |  |
| ConversionManager | conversionAdminCard | S, U | S |  |
| ConversionManager | conversionInstallationData | S, U | S |  |
| ConversionManager | conversionKitsData | S, U | S |  |
| ConversionManager | conversionMerchantProfile | S, U | S |  |
| ConversionManager | conversionOrderInformation | S, U | S, U |  |
| ConversionManager | conversionPosConfiguration | S, U | S |  |

## MIS database access and table permissions

The following table describes database user permissions required by MCM when accessing MIS database tables to retrieve Host Data.

|  |  |  |
| --- | --- | --- |
| **Database** | **Table** | **mcmserver** |
| mdwibi | losimechco | Select |
| mdwibi | card\_type\_merchant\_rms | Select |
| mdwibi | card\_type\_merchant\_pos | Select |
| mdwibi | card\_type\_locale | Select |
| cable\_source | eftpos\_4\_sta | Select |
| cable\_source | device\_all | Select |

## Link MCM and MIS databases

The MCM requires a database link to MIS database to retrieve Host data. The DBA can run MCM Function “Functions\MCM\ initializeConversionDatabase”, which creates the database link between MCM and MIS database.

## Contingency Plan

The Contingency Plan – MCM is not operational – requires that OMS is operational and able to accept Conversion Work Orders. The Technical Analyst can enter Conversion Work Orders through OMS – MCM only facilitates in planning Conversions and creating a batch of Work Orders that constitute a single Conversion Order. In the event MCM is not operational and Conversion Work Orders need to be created, then follow the suggested procedure:

1. Obtain the list of Merchant Ids, which require immediate Work Orders.
2. Use OMS to enter Conversion Work Orders for each Merchant Id.
3. Technical Analyst will need to create a Conversion Order containing Conversion data on all Merchant Ids entered through OMS, once MCM becomes operational.
4. Technical Analyst will need to Schedule the Conversion Order – make it available for retrieval by OMS.
5. OSS Application Support is required to remove the Conversion Order created in the previous step from ConversionInterface database. This step will allow the MCM to track properly Converted Merchants without duplicating the Work Orders – the Conversion data deleted from ConversionInterface database tables will not be propagated to OMS.
6. Technical Analysts will use MRE reports from OMS to update the status of the Conversion Order and the status of individual Merchants that were included in the Conversion Order.