FeedXChange

Installation Guide

Version 2.0

(per-production draft – please do not distribute)

LOYALTY methods

Contents

About the Install Media

The FeedXChange product comes with two archive files:

1. **fx.zip** is the backend.
2. **fxfront.zip** is the frontend.

Frontend Install Process

The front-end install makes changes to the Siebel repository and copies some seed data into your environment. It is not very different from applying a Siebel patch.

Unpacking the File

Unpack the fxfront.zip on your Siebel Tools machine in a folder which we will refer to as the <**install**> folder. Ensure that you have PERL installed on that machine.

Applying Tools Changes

FeedXChange requires that you use Tools to import some object definitions which will drive the views in the Siebel UI.

Follow these steps to apply the tools changes:

1. Import Siebel Configuration from Archive files into Siebel Tools

```
Menu → Tools → Import from Archive(s)
```

Select the file <**install>\sif\FeedXChange.sif** and import it with Overwrite option.

Note: It is very important to use the Import from Archive(s) option, and not the Import from Archive option. You should see the following dialog box:
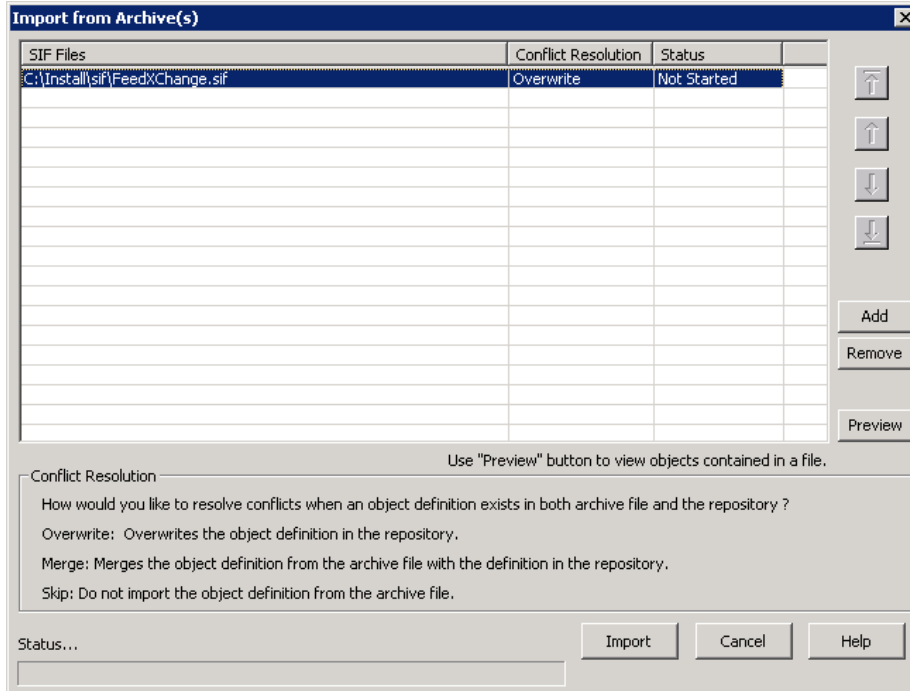
Figure 1 Importing Archive(s) from Tools

2. Manually add the new Screen to the Application in Tools

   Create a new **Screen Menu Item** under '**Siebel Loyalty'** application, with the following properties:
   - Screen = LM FINT File Integration Screen
   - String Override = Administration – FeedXChange

   Note: You will likely need to lock the 'Siebel Loyalty' application object if you have not done so already.

3. Apply Schema Changes for New Tables

   In Tools, go to Tables and Select all Tables under Project **LM FeedXChange Table**.
   Use the **Apply/DDL** button.
   Ensure you are applying all tables in Current Query as shown below:

Figure 2 Applying DDL from Tools

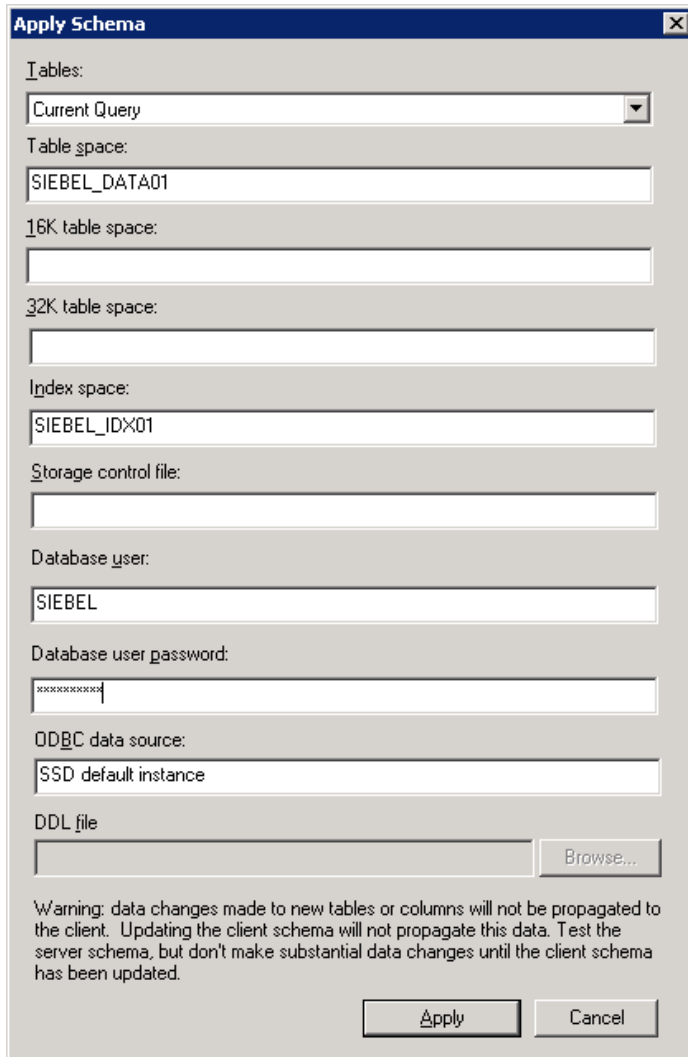**Note:** You will need to specify your own table space names based on your Siebel database installation.

4. Copy the FeedXChange Logo

   Copy <**install**>/images/feedxchange_icon.gif to the **siebsrvr/webmaster/images/enu** directory. Restart the web server.

5. Do a full SRF compile and deploy the SRF.
6. Generate the browser scripts for your SRF using genbscript.
7. Restart your Siebel Server.

Running the Front-End Setup Utility

Run the setup utility to load admin data. Follow these steps:

1. Go to command prompt in your tools machine.
2. Change the current folder to the **<install>** folder.
3. Execute the following command line:

```
perl  seedinst
```

4. Follow the prompts and enter the following information:
   a. Siebel Gateway host name
   b. Siebel Enterprise name
   c. SADMIN user credentials

The utility will upload all the seed data directly to your server. You should see a string of "Success" messages.

Assigning FeedXChange Responsibilities

FeedXChange views are tied to the **LM File Integration Administrator.** Please assign this responsibility to anyone who is going to need to use FeedXChange.

Backend Install Process

Unpacking the fx.zip File

1. Choose in which directory on the Siebel server you'd like to install the FeedXChange product.
    a. This could be any directory which is accessible for read/write/execute to the OS user under which the Siebel server runs.
    b. From this point forward this directory will be referred to as <install directory>.
2. Change the current working directory to the directory you chose in step 1.
3. Unzip the fx.zip distribution file. This should produce an fx.tar file.
4. Use the following command line to unpack the tar file:

```
tar xvf fx.tar
```

Installing the Back-end Database Schemas

Please ensure the following are runnable from the command line before you proceed:

- sqlplus
- perl

Please ensure the database has a user called BATCH with the following:

- Ability to create objects should be granted to BATCH, including at least:
    o Tables (grant create table to BATCH)
    o Sequences (grant create sequence to BATCH)
    o Stored Procedures (grant create procedure to BATCH)
- The Siebel SSE_ROLE should be granted to BATCH

1. Change the directory to **<install directory>/fx/install**
2. Run the "dbinst" database install utility.

Running the Back-end Setup Utility

Please ensure the following are runnable from the command line before you start:

- sqlplus
- java
- perl

1. Change the directory to **/<install directory>/fx/install**
2. Run the setup utility. Follow the prompts and enter the following information:
    - FeedXChange Home Directory
        o This is the directory you unpacked the FeedXChange zip file into followed by "/fx".

- o Make sure to add the "fx" name at the end of the directory, for example if you unpacked fx.tar into /u01/apps, then the home directory is /u01/apps/fx.
- Siebel database TNSNAME entry service name
  - o This should correspond exactly to what you have in the TNSNAMES.ora file.
- SIEBEL database user credentials
- BATCH database credentials.
- Java Home directory, where your JDK is located.
- Path to "siebsrvr" folder
  - o This is the absolute path to the siebsrvr folder of your Siebel server install. For example, /u01/siebel/siebsrvr.
- Default time zone.
  - o This should correspond to the time zone under your Siebel System Preferences. For example, for west coast it will be America/Los_Angeles. See Appendix A for all the possible values that can be entered here.
- JDBC URL to Siebel Database
  - o This a connect string of the form jdbc:oracle:thin:@//**localhost**:**1521**/**SIEBEL**: where you just need to replace the highlighted parts with your database host and SID. For example, if your database host was dbhost_1, on port 1521 and the SID was SBL then you would enter jdbc:oracle:thin:@//**dbhost_1**:**1521**/**SBL**.
- JDBC Driver Class Name
  - o Leave this with the default of oracle.jdbc.driver.OracleDriver
- Username/Password for srvrmgr:
  - o Typically this is SADMIN database user credentials.
- Siebel Gateway host name
- Siebel Enterprise name
- Siebel server name
  - o This is the logical name of the Siebel server where FeedXChange is being deployed.
- Mail gateway address (if you plan to use Alerts)
- Mail gateway port (if you plan to use Alerts)
- Mail Authentication – true/false
  - o If your SMTP gateway requires authentication, enter true.
- Mail TLS Enable – true/false
  - o If your SMTP gateway requires TLS set this to true.
- Default Input File Directory
  - o This is the directory where all files will be picked up by FeedXChange for processing by default.
- Default Output File Directory
  - o This is the directory where all response files will be placed by FeedXChange
- Default Processed File Directory
  - o Once a file is processed it will be archived in this directory.

- Mail Authentication Username/Password
  - o If you selected the Mail Authentication = true then enter the credentials here.
3. After all these parameters are entered, they will be displayed in summary form by the setup utility so you can verify them. Please type "yes" to confirm parameters are correct, or "no" to re-enter them.
4. Enter the SIEBEL database TNSNAMES entry to be used to update the parameters in the FeedXChange database.

The setup utility will complete the parameter setup and exit with a success message.