

Oracle Policy Automation Connector for CRM On Demand Installation Guide

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This document contains step by step instructions on how to install the Oracle Policy Automation Connector for CRM On Demand to an existing CRM On Demand environment.

System Requirements

The following are the minimum software and hardware requirements for the Oracle Policy Automation Connector for CRM On Demand application.

Note:

The minimum recommended screen resolution for Oracle Policy Automation Connector for CRM On Demand is 1024 by 768 pixels.

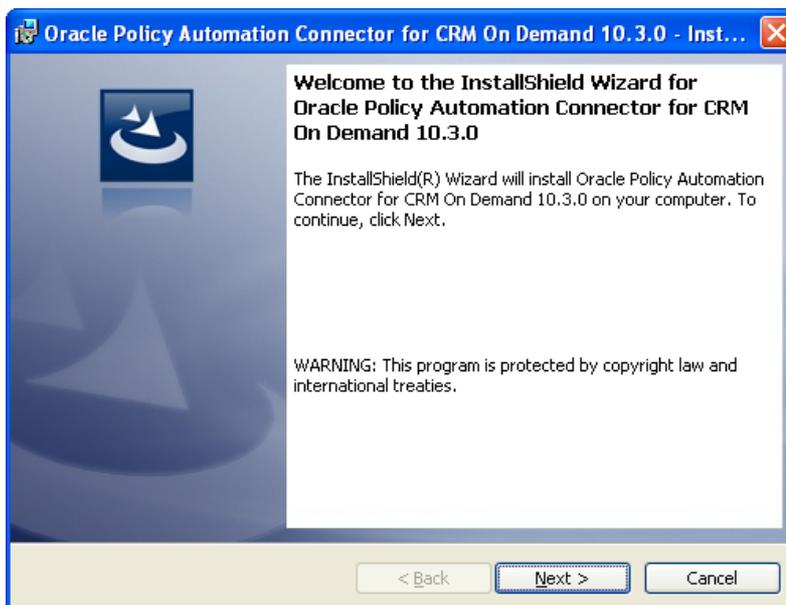
Product	Interoperable Versions
Oracle Policy Modeling	10.3

Installing the Connector

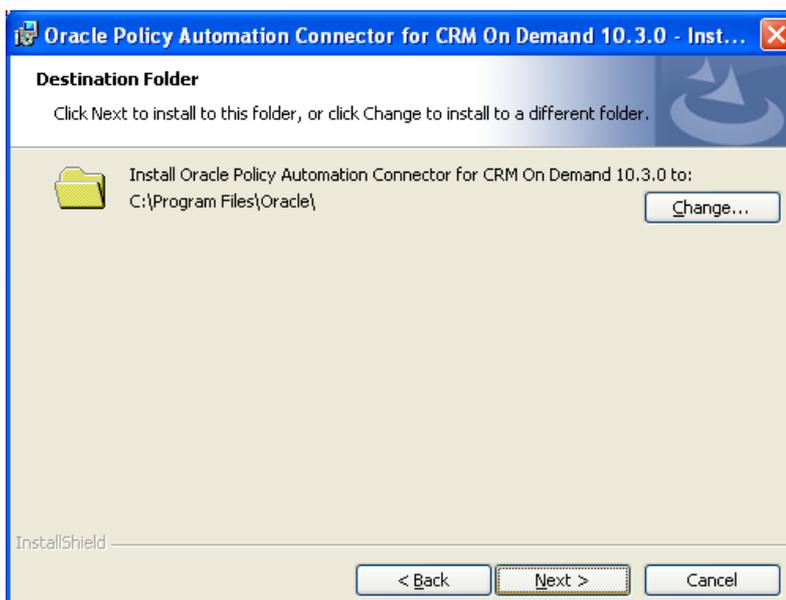
The OPA Connector for CRM On-Demand comprises of two components: the CRM On Demand Oracle Policy Modeling Plugin and the Web-Determinations CRM On Demand Connector.

The Oracle Policy Automation Connector for CRM on Demand MSI will install the CRM On Demand Oracle Policy Modeling Plugin in the plugin directory of Oracle Policy Modeling, while the Web Determinations CRMOD Connector WAR file is copied to the <Program Files>\Oracle\Policy Automation - CRM on Demand folder.

1. Run the **setup.exe** file to begin the installation process. You are presented with the **Welcome Screen**, click *Next* to continue.

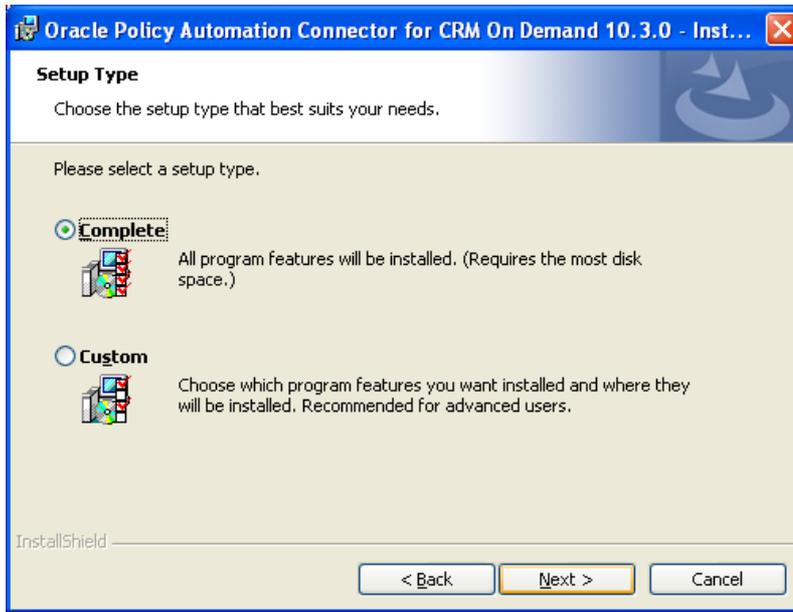


2. You are presented with the **Destination Folder** screen. If you want to change the installation directory, click on the **Change...** button to locate and set the appropriate destination folder. Then, click *Next*.

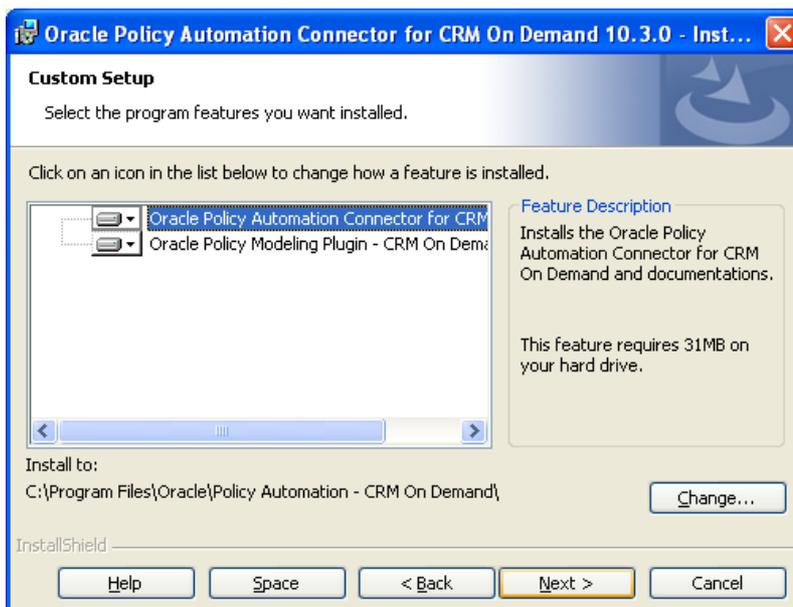


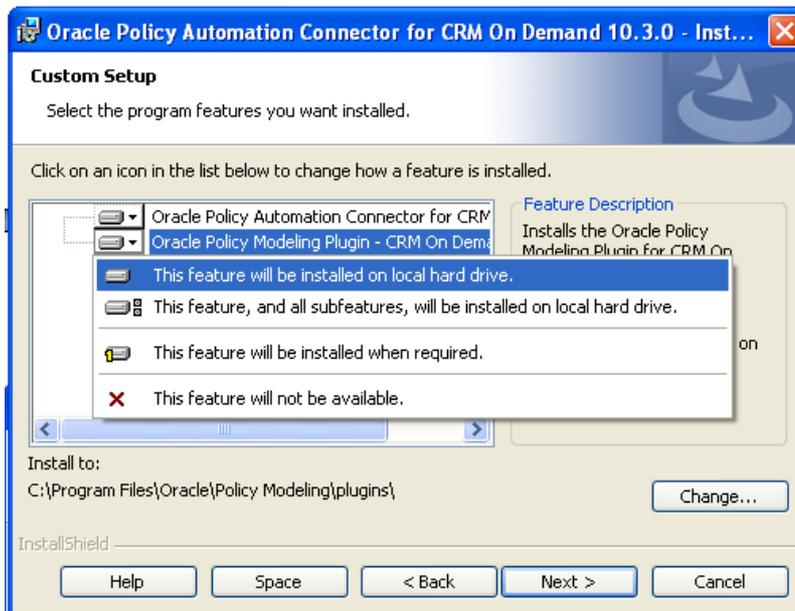
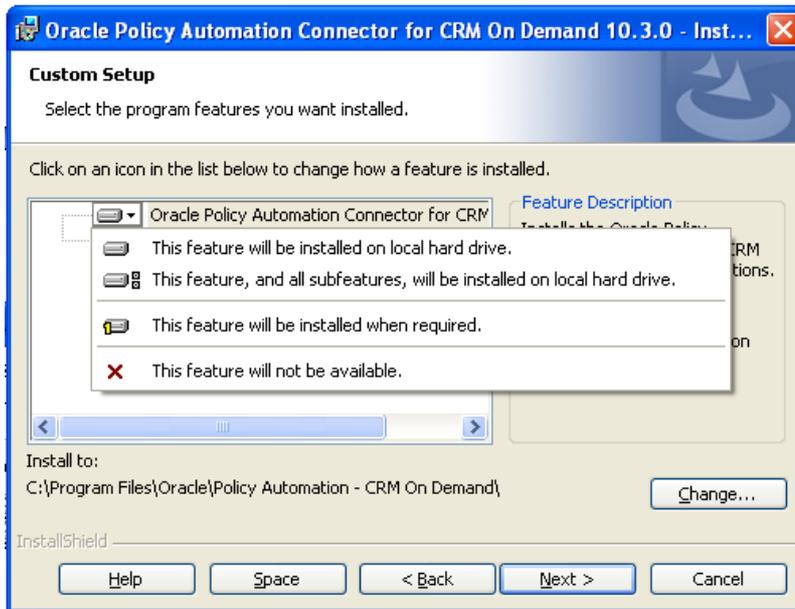
3. You are presented with the *Setup Type* page. Follow the on-screen instructions and choose a setup type.
 - a. **Complete** – installs both the *CRM On Demand Oracle Policy Modeling Plugin* and the *Web-Determinations CRM On Demand Connector*.
 - b. **Custom** – allows the user to choose which software will be installed and where they will be installed.

Click on the **Next** button.



4. If you chose **Custom** from the previous step, you are presented with the *Custom Setup* page. On the *Custom Setup* page, if you wish to change the installation method, click on an icon in the list. If you want to change the installation directory, click on the **Change...** button to locate and set the appropriate path.

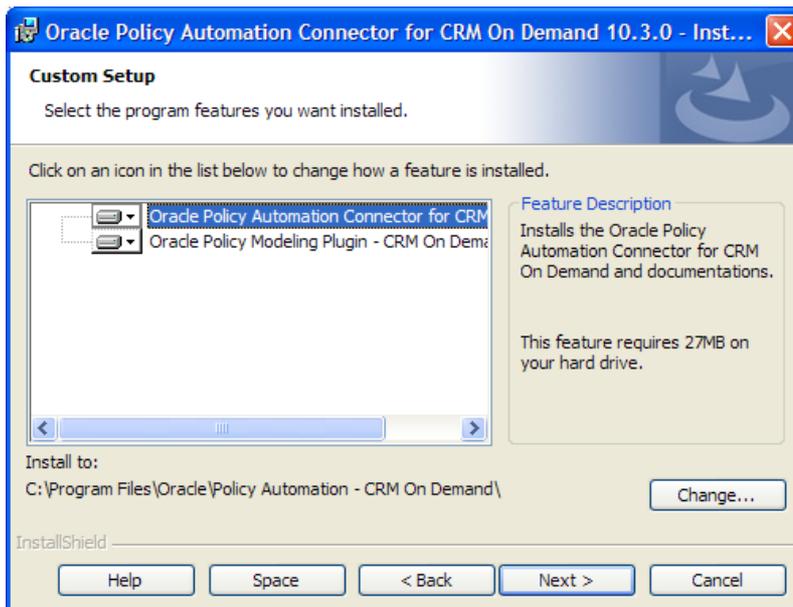




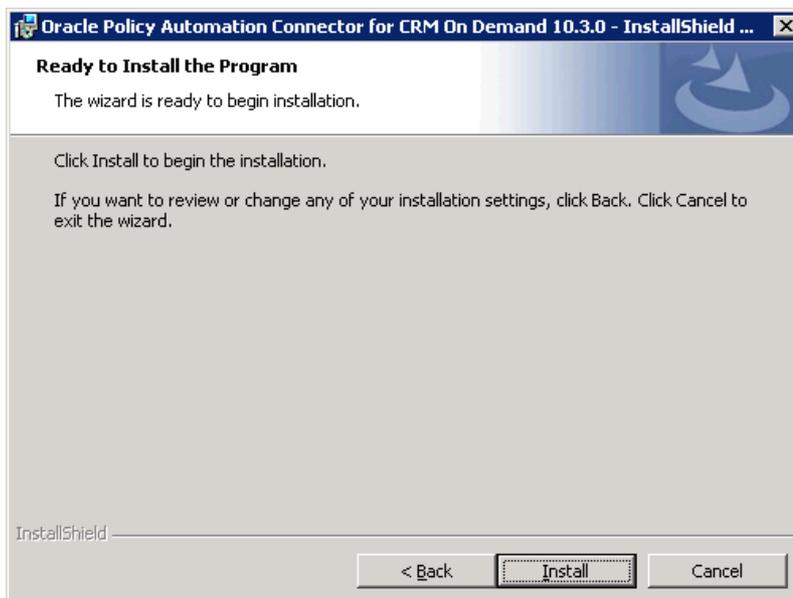
Notes:

If you are installing the *Oracle Policy Modeling Plugin - CRM On Demand* component, you must first install Oracle Policy Modeling.

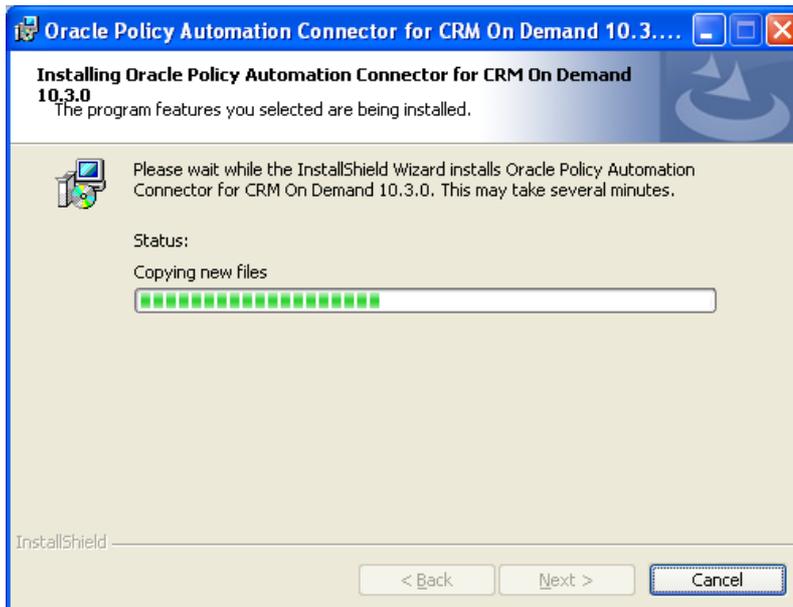
For the *Oracle Policy Modeling Plugin - CRM On Demand* component, the installation directory can only be either C:\Program Files\Oracle\Policy Modeling or C:\Program Files\Oracle\Policy Modeling\plugins to enable Oracle Policy Modeling to load the plugin.



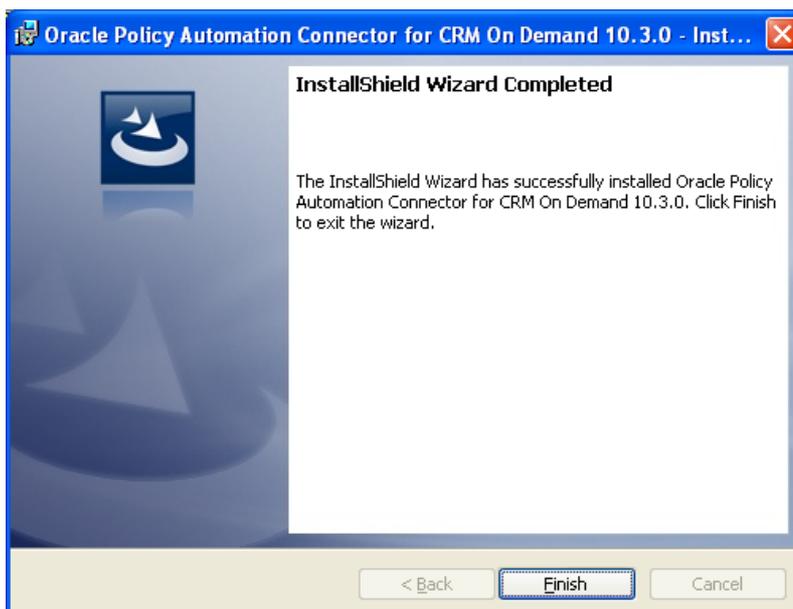
5. Click on the **Next** button; you are presented with the *Ready to Install the Program* page.



6. Click on the **Install** button to copy the required files to the installation directory and complete the installation process.



7. Click on the **Finish** button to complete installation and close the installation wizard.



Finalize and Validate the Connector Installation

This section describes how you can verify the installation of Oracle CRM On Demand Connector.

1. Verify the installation directory

The Connector for CRM On Demand is typically installed at the following location:

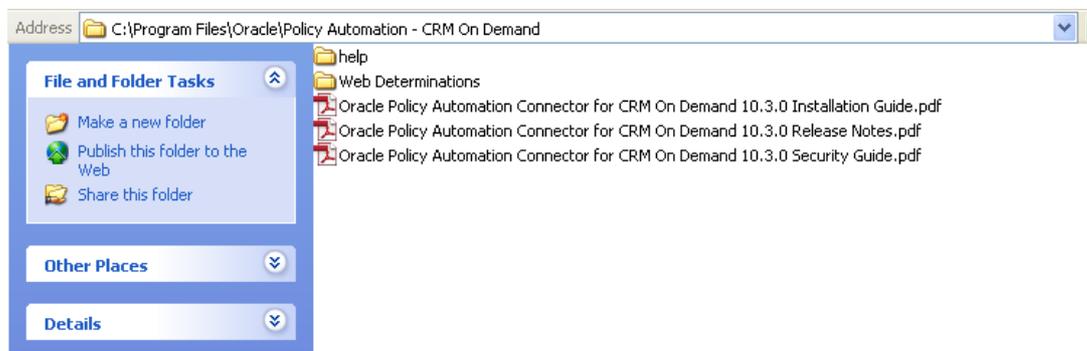
C:\Program Files\Oracle\Policy Automation – CRM On Demand.

It should contain two folders, namely **help** and **Web Determinations**. It should also include the following documentation:

Oracle Policy Automation Connector for CRM On Demand Installation Guide

Oracle Policy Automation Connector for CRM On Demand Release Notes

Oracle Policy Automation Connector for CRM On Demand Security Guide.



The **Web Determinations** directory contains the runtime and encryption tool as well as sample rulebases which were pre-configured with a mapping file based on a CRM On Demand data model.

The Oracle Web Determinations runtime, bundled with Oracle Policy Automation Connector for CRM On Demand is located at the following location:

Web Determinations\Java\crmod-web-determinations.war

Open this war file using any archiving tool (for example, 7zip) to verify that the following files are included in the web application archive:

- WEB-INF\lib\crmod-connector.jar
- WEB-INF\lib\crmod-exchange.jar
- WEB-INF\classes\configuration\crmod-data-adapter.properties

For detailed instructions on deploying Oracle Web Determinations please refer to the *Oracle Policy Automation Runtime Installation Guide*.

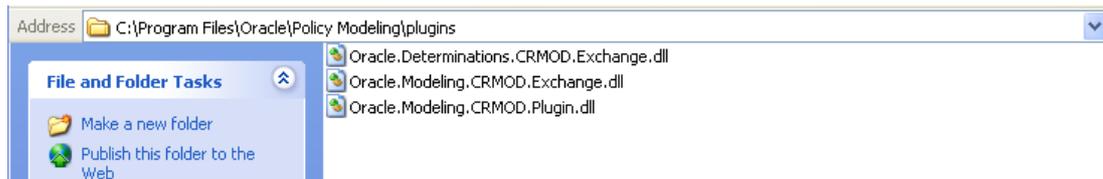
2. Verify the Oracle Policy Modeling plugin installation

The Oracle Policy Modeling plugin for CRM On Demand should be located in the plugin folder of the installation directory of Oracle Policy Modeling. Typically you can locate it at

C:\Program Files\Oracle\Policy Modeling\plugins

The following libraries should be sitting in this directory:

- Oracle.Determinations.CRMOD.Exchange.dll
- Oracle.Modeling.CRMOD.Exchange.dll
- Oracle.Modeling.CRMOD.Plugin.dll



3. Run the Admin Smoke Test

1. Deploy and configure the CRM On Demand Connector for Oracle Web Determinations; please refer to the *Oracle Policy Automation Connector for CRM On Demand Developer Help* for information on how to configure the adapter.
2. After deploying the war file, copy the *AccountAdminSmokeTest* sample rulebase to the deployment directory.
3. Go to the following directory and extract the *AccountAdminSmokeTest* archive:

C:\Program Files\Oracle\Policy Automation - CRM On Demand\Web Determinations\Examples

4. In the extract files, go to the **output** folder and then copy the *AccountAdminSmokeTest.zip* compiled rulebase zip to the following location:

<webapp>\crmod-web-determinations\WEB-INF\classes\rulebases

5. Navigate to Oracle Web Determinations in the browser with the following URL:

http://<domain>:port/crmod-web-determinations?caseID=<row id>

Where row id refers to the record id of an Account record in CRM On Demand.

This should be able to pre-seed the interview data with the Account record.

