Kofax FraudOne

Report Component Installation Guide

Version: 4.4.2

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KOFAX

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Preface

Related documentation

The full documentation set for Kofax FraudOne is available at the following location:
https://docshield.kofax.com/Portal/Products/en_US/FO/4.4.2-c5l5th79bw/FO.htm

In addition to this guide, the documentation set includes the following items:

Guides

- *Kofax FraudOne Administrator's Guide*
- *Kofax FraudOne Data Warehouse Installation and Operation Guide*
- *Kofax FraudOne Extended Reporting Features and Statistics*
- *Kofax FraudOne Feature Codes*
- *Kofax FraudOne Installation and Migration Guide*
- *Kofax FraudOne Java Client Customization Guide*
- *Kofax FraudOne Java Client Customization Layer*
- *Kofax FraudOne License Management*
- *Kofax FraudOne SignCheck Result Codes*
- *Kofax FraudOne Standard Reporting Features and Statistics*
- *Kofax FraudOne The Book on CRS*
- *Kofax FraudOne Thin Client Customization Guide*
- *Kofax FraudOne Thin Client Customization Layer*

Interfaces

- *Kofax FraudOne Archive Interface Server*
- *Kofax FraudOne ASV Blackbox*
- *Kofax FraudOne Global Fraud Signature Web Service Developer's Guide*
- *Kofax FraudOne Common API Specifications for GIA Engines*
- *Kofax FraudOne Service Program Interfaces*
- *Kofax FraudOne User Login Procedure*
- *Kofax FraudOne Standard Teller Interface*
- *Kofax FraudOne Variant Cleanup Utility*

Online Help

- *Kofax FraudOne Administration Client Help*
- *Kofax FraudOne Java Client Help*
- *Kofax FraudOne Server Monitor Help*

- *Kofax FraudOne Thin Client Help*

Training

Kofax offers both classroom and computer-based training that will help you make the most of your FraudOne solution. Visit the Kofax website at www.kofax.com for complete details about the available training options and schedules.

Get help for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com.

The Kofax Support page provides:

- Product information and release news

  Click a product family, select a product, and select a version number.

- Downloadable product documentation

  Click a product family, select a product, and click **Documentation**.

- Access to product knowledge bases

  Click **Knowledge Base**.

- Access to the Kofax Customer Portal (for eligible customers)

  Click **Account Management** and log in.

  To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

- Access to support tools

  Click **Tools** and select the tool to use.

- Information about the support commitment for Kofax products

  Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Checklists

> **Important** Due to the deployment changes in recent Rails versions, no SP package will be supplied for the Ruby and Rails environment. The standard Rails installation method is used instead.

- ❑ Install Java JDK
- ❑ Install SP Java business model
- ❑ Install ImageMagick
- ❑ Install Ruby
- ❑ Unpack the Reports2 package
- ❑ Install the DevKit for native gems
- ❑ Update the gems system
- ❑ Install bundler
- ❑ Install the required gems
- ❑ Configure Reports2
- ❑ Start and test it

Installing required FraudOne components

To perform the system login the Java business model is used. You will have to install the Java JDK and the business model on the machine where the reports server is located.

Java JDK

The SOFTPRO business model is based on Java. It is needed for client login. It is important that the JDK version is installed (**not JRE**).

Install the version required by the currently used Java client. Also make sure that the JAVA_HOME and PATH environment variables are pointing to the JDK.

FraudOne business model

Install the SignPlus business model and all components and shared libraries required by it according to the *Kofax FraudOne Administrator's Guide*.

Make sure that the SignPlus root directory and the shared directory have been added to the PATH environment variable.

Note down the path to the SignPlus business model JAR file (SPClient.jar within the JavaClient directory), you will have to configure it in the reports server settings later. (You can test if this works by starting the Java Client and logging in).

Check DB versions

Check that you are running the required database versions:

- DB2: Version 9.7
- Oracle: tbd
- SQL Server tbd

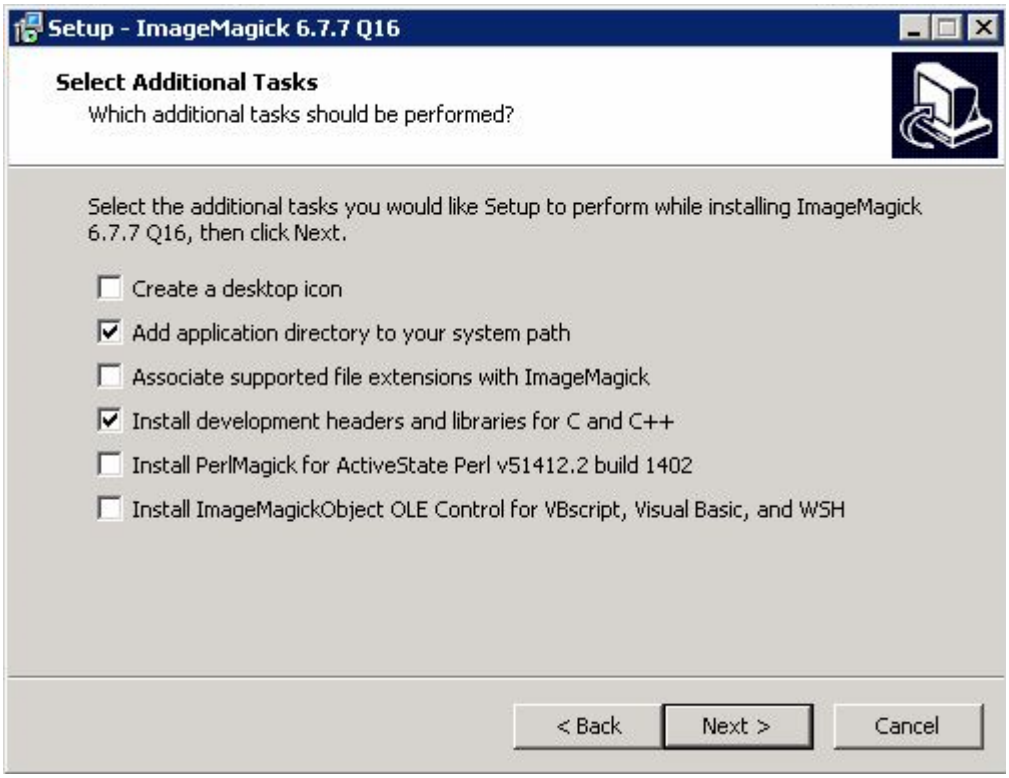
Installing required 3rd party software

ImageMagick

Background information: Reports use ImageMagick for all forms of graphical reports.ImageMagick has to be installed on the Reports server if graphics are needed.

Download and install ImageMagick-6.7.7-7-Q16-windows-dll.exe from http://www.imagemagick.org/script/download.php. The file is also available on the shared\3rdparty\ImageMagick repository and may be part of this shipment.

> **Important** It is important that you install ImageMagick in a location path that does not have spaces in it. The default installation path is not suitable.
>
> Also make sure to install the C development headers and libraries part of the installation process:



Set following environment variables:

- `set DFImageMagick`
  environment variable pointing to where ImageMagick is installed
- `set PATH=%DFImageMagick%;%PATH%`
  if you don't already have it in PATH
- `set CPATH=%DFImageMagick%\include;%CPATH%`
- `set LIBRARY_PATH=%DFImageMagick%\lib;%LIBRARY_PATH%`

Ruby

Instructions for installing Ruby and Rails are available on http://rubyinstaller.org/downloads/.

Install the Ruby binary, version 1.9.3p194 is the minimum. You can also find this on the shared\3rdparty\ruby repository or download it from http://rubyinstaller.org/downloads/.

The installation target must be a directory without any spaces (good: d:\applications; bad: c:\Program Files (x86)).

Install reports

The reports come packaged in a ZIP file **Reports2.zip**. Unpack the ZIP file into an empty directory of your choice. This will become the root directory of the reports component. You will need to use this directory as a working directory and start the servers from here.

If you use customer specific reports in addition to the core reports, unpack also the customer specific reports ZIP file into the same directory. It will install additional customer specific files and overwrite some of the core settings. The customer specific reports ZIP file usually comes with your shipment (Reports2_XXX.zip).

Database configuration

The gemfile (list of gems to be used by the report application) contains entries for the currently supported database drivers. Only one of these needs to be installed.

Rename the file

```
Gemfile.sample
```

to

```
Gemfile
```

Edit the file

```
Gemfile
```

It is located in your report root directory.

Uncomment the entries that refer to your database engine located at

```
# Databases
```

Gems

Ruby Development Kit

Some of the gems we are using have native components. They will be built on our machine. To be able to do so, we will have to install the DevKit.

Go to http://rubyinstaller.org/downloads/, download and install the Development Kit. You can optionally use the version that is part of this shipment.

You can find complete installation instructions here:
https://github.com/oneclick/rubyinstaller/wiki/Development-Kit

The installation target should be the devkit directory within the Ruby installation directory.

Update the gem handler to the current version

Start the Ruby command line (available in the start menu) or start a command line window and add the necessary environment variables.

Navigate to the reports directory.

Versions prior to 1.8.24 have a problem reading SSL certificates to the server.

Run:

```
gem update --system
```

Bundler

With Rails 3.2, gems do not need to be installed separately by the user. The application provides a list of dependencies that can be loaded automatically. The only gem that needs to be installed is bundler. It will manage the rest.

Do this by installing the bundler gem:

```
gem install bundler
```

The rest of it

Since some of the gems (notably rmagick) will be built on the machine, the environment variables need to be set accordingly.

Check that the environment variables mentioned above have been set. Change to the root directory of your reports installation, then run:

```
bundle install
```

This will install all dependencies for the reports project with the required version numbers.

Configuration

> **Important** Current versions of RMagick may have a problem with regional settings. You may have to set your number format to use '.' as a decimal separator on the server. Clients can use their own setting.

For a first time installation rename the file

```
config\database.yml.sample
```

to

```
config\database.yml
```

Open the file

```
config\database.yml
```

It contains the database configuration. Edit the production environment and enter your database details. The sample provides information for DB2, Oracle and SQL Server.

For a first time installation rename the file

```
config\reports\report_config.rb.sample
```

to

```
config\reports\report_config.rb
```

Open the file

```
config\reports\report_config.rb
```

It contains the report configuration. Check and edit the parameters in the first section (above the line that reads '# Do not change these:'). The settings are commented.

It is important that you set following settings correctly:

- The data model (:account or :customer).
- The REPORT_GROUPS. Delete the report groups your customer does not use (no SC or Service for a SB only installation).
- If the customer you are installing has customer specific reports, a line with the customer name, pointing to the customer reports controller will be appended to the REPORT_GROUPS.
- The available BNOs. The list contains one line for each BNO: the BNO number and a description text. If you do not have textual descriptions for the BNOs, enter the BNO number as description text. Keep descriptions short.
- The path to the 'spclient.jar' business model file (SPCLIENT_PATH).
- Newer versions don't use the IE6_COMPAT setting any more. Browser type detection is done automatically.

If you want to resolve queue numbers and feature codes to names change the setting WF_SERVER_NAME and point it to the machine name of the computer on which the workflow router (WFRouter) is running. If you have configured the workflow router to use a non-default message port set the setting WF_MSG_PORT to the correct port number. The reports server will now attempt to retrieve the queue configuration during startup. This will only work if the workflow router is running and the communication is not prevented by firewalls.

Test

Start the server. Open the Ruby command prompt, move to the reports root directory and type:

```
rails server -e production
```

Instead of the '-e' switch, the environment to use can also be set via the RAILS_ENV environment variable.

The server will start and display the port it is running on:

```
D:\dev\Demo\Reports>rails server
=> Booting WEBrick
=> Rails 3.2.5 application starting in development on
   http://0.0.0.0:3000
=> Call with -d to detach
=> Ctrl-C to shutdown server
[2012-06-25 19:26:35] INFO  WEBrick 1.3.1
```

```
[2012-06-25 19:26:35] INFO  ruby 1.9.3 (2012-04-20) [i386-mingw32]
[2012-06-25 19:26:35] INFO  WEBrick::HTTPServer#start: pid=6764
   port=3000
```

Point a web browser to the address:

```
http://localhost:3000
```

The reports log in page should show.

Advanced topics

Using the Mongrel server

The Reports2 bundle file contains Mongrel and the minimum version needed for Ruby 1.9. Currently the default Mongrel version (1.1.5) will not be able to run with Ruby 1.9, therefore the 1.2.0pre2 has been used.

If you want to start Mongrel instead of Webrick, start the server with the command:

```
rails server mongrel -e production
```

Running Mongrel as a service

The 'mongrel_service' gem used with previous versions is not available for Ruby 1.9.

Therefore, running Mongrel as a service has to be accomplished using different tools, like the Windows Resource Kit.

Do not start Mongrel with

```
mongrel_rails start
```

This will not work with Rails 3.

Use instead:

```
rails server mongrel
```

Load balancing

Rails servers are single threaded and only process one request at the time. In heavier load environments it is available to use several servers with a load balancing mechanism. Several alternatives are available.

See http://mywheel.net/blog/index.php/2007/01/26/hosting-ruby-on-rails-lighttpd-apache-mongrel-webrick-litespeed-and-ngnix/ (Mongrel + ngnix)

and http://blog.innerewut.de/articles/2006/04/21/scaling-rails-with-apache-2-2-mod_proxy_balancer-and-mongrel (Mongrel + Apache + mod_proxy_balancer).

> **Note** ngnix is now available for Windows platforms.