REST API Installation Guide

April 2021

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Introduction

This document outlines the procedures to install or upgrade the REST API webserver. This check list provides all the steps included in this guide:

Proce	Procedures in this Guide		
	Set up the webserver environment.		
	Download the installation file and .zip file.		
	Install or upgrade the REST API webserver.		
	Confirm the installation.		
	Optional: Configure Log File Settings.		

Pre-Installation Preparation

Prerequisites

- Release current with REST API package.
- Microsoft .NET Framework version 4.7.2 or greater.
- Latest Microsoft Windows updates.
- Windows Server 2016 or Windows Server 2019: The services depicted in <u>Enabling Web Server</u> (IIS) Server Role and Role Services must be installed as part of IIS and while setting up the Application Server role.
- Microsoft ASP.NET Core 2.1 Runtime (v2.1.0) or greater.
- Microsoft Web Deploy 3.6 must be installed on the workstation that runs the installation. 64-bit servers should install the 64-bit version of the software (WebDeploy_amd64_en-US.msi).

IMPORTANT! Installation must be performed on a standalone server and cannot be installed on a new or existing XM server.

Need Help?

Submit a case through Case Management if you need assistance during the installation process.

Enabling Web Server (IIS) Server Role and Role Services

For more information on this procedure, go to Microsoft's article, Host ASP.NET Core on Windows with IIS for ASP.NET Core 2.1.

1. Use the Add Roles and Features wizard from the Manage menu or the link in Server Manager. On the Server Roles step, check the box for Web Server (IIS).



 After the Features step, the Role services step loads for Web Server (IIS). Select the IIS role services desired or accept the default role services provided.

📥 Add Roles and Features Wizard		- 🗆 X
Select role service	es	DESTINATION SERVER
Before You Begin	Select the role services to install for Web Server (IIS)	
Installation Type	Role services	Description
Server Selection Server Roles Features Web Server Role (IIS) Role Services Confirmation Results	 ✓ Web Server ✓ Common HTTP Features ✓ Default Document ✓ Directory Browsing ✓ HTTP Errors ✓ Static Content HTTP Redirection WebDAV Publishing ✓ Health and Diagnostics ✓ HTTP Logging Custom Logging Logging Tools ODBC Logging Request Monitor Tracing ✓ Performance ✓ Static Content Compression Dynamic Content Compression 	Web Server provides support for HTML Web sites and optional support for ASP.NET, ASP, and Web server extensions. You can use the Web Server to host an internal or external Web site or to provide an environment for developers to create Web-based applications.
	× 7	
	< Previous N	ext > Install Cancel

Proceed through the Confirmation steps to install the web server role and services.
 Note: A server/IIS restart *is not* required after installing the Web Server (IIS) role.

Installing REST API

This procedure installs REST API on the configured webserver.

Choose one of the following options to perform a new installation:

- Run the executable file provided with the download.
- Run the installation from the command line.

Installing with the Executable File

This procedure performs a new installation using the executable file provided as part of the package file downloaded from Support Center.

Go to <u>Upgrading with the Executable File</u> if REST API has previously been installed on this web server.

- 1. Double-click the executable file (.exe), and then click Next on the first installation window.
- 2. Review the License Agreement and click Next.



3. Select New Installation, and click Next.

	Config	uration		
Installation Type O New Installation	O Upgrade Existing	Installation		
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4. On the next window, specify the environment location for the installation.

Note: The Virtual Directory URL automatically populates the root folder as \API\.

If you need to modify the virtual directory, click the ellipses next to the Folder To Display field to select a different file location.

Field	Description
Environment	Select Staging or Production to indicate the install environment.
	IMPORTANT! The installation should be performed first in your Staging environment to ensure it is working as expected.
Environment Name	Enter the name of the environment, such as staging or production in this field.
Institution Name	Enter the institution name as it appears in the virtual directory file path. You can use an abbreviation or shortened name if you prefer.
Site To Deploy	This field does not need to be updated unless you have already configured multiple web sites on this webserver.

Environment	Production		
Environment Name:	production		
Institution Name:	InstitutionName		
Site To Deploy:	Default Web Site	~	
Virtual Directory URL:	/PhoenixAPI/InstitutionName/	production	
	http://localhost/PhoenixAPI/In	stitutionName/production	
Folder To Deploy:	C:\PhoenixAPMnstitutionNam	e\production	

Note: The Virtual Directory URL and Folder To Display fields are automatically populated.

5. Click Next to review the installation information displayed the Confirmation window. Then, click Install.

Installtion Type:	Create New					
Environment Type: Institution Id: Environment Name: Folder To Deploy: Site: Default Web S Virtual Directory:	Production Test2021_1 production C:\PhoenixAPI\Test2 Site /PhoenixAPI/Test2	t2021_1\pr 021_1/prod	oduction luction			
Log File: C:\ PHX_API_INST_21012 .NET Core Verion: . NET Verion: .NET F Directory C:\Phoeni MSDeploy Location: API Location: C:\ WebDeploy\Phoenix. Found Site Name - [Created Folder C:\F Click Install butto	291\Install.log 8.3.1020 - Microso ramework Version: ixAPI\Test2021_1\p C:\Program Files Api.deploy.cmd (Default Web Site) PhoenixAPI\Test202 on to start.	oft® .NET F 4.7.2 or orduction (x86)\IIS\ \\AppD 1_1\produc	Local\Temp ramework later will be cr Microsoft Vata\Local\ tion	o\Phoenix reated Web Deplo \Temp\7256	y V2∖msdep 6688.tmp\ir	oloy.exe stall\

6. Wait while the installation is performed, and then click Close.

Note: Log files are automatically created when the installation process completes. You can view these files by navigating to the locations displayed on this window.

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nfo: Updating file (Default Web nfo: Deleting file (Default Web otal changes: 2006 (1 added, 2 eb Deploy, Done reated install log @ C:\Phoenbo irtual pir: http://localhost/Phoer og File: C:\Users\UserName\A END	Site/PhoenixAPI/backl/btoging_ameror Site/PhoenixAPI/backl/btoging_lxi deleted, 2003 updated, 0 parameters ch API/InstitutionName/staging INSTALL_XM ixAPI/InstitutionName/staging npData/Local\Temp\Phoenix\PHX_API_INST	Luci-doc'recerts/umpi/stetorafitwa Lucani manged, 162948095 bytes copied) L

- 7. Navigate to the Product.server.config file on the **XM** server.
- 8. Copy and paste the file to the **REST API** server to the staging or production folder.

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	^ Name	Date modified	Туре ^	Size
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	- ru	1/29/2021 1:44 PM	File folder	
	webassembly	1/29/2021 1:50 PM	File folder	
	www.root	1/29/2021 1:46 PM	File folder	
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	zh-Hant	1/29/2021 1:46 PM	File folder	
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	Microsoft.Al.Agent.Intercept.dll	6/27/2017 12:59 PM	Application extens	1,912)
	Microsoft.Al.DependencyCollector.dll	5/21/2018 2:55 PM	Application extens	128 1
	Microsoft.Al.PerfCounterCollector.dll	5/21/2018 3:08 PM	Application extens	209 1
	Microsoft.Al.ServerTelemetryChannel.dll	5/21/2018 8:25 PM	Application extens	1111
	Microsoft.Al.WindowsServer.dll	5/21/2018 3:06 PM	Application extens	110 8
	Microsoft.ApplicationInsights.AspNetCor.	. 5/23/2018 10:08 PM	Application extens	761
	Microsoft.ApplicationInsights.dll	5/21/2018 8:22 PM	Application extens	285 1
	Microsoft.AspNetCore.Antiforgery.dll	11/12/2018 5:33 PM	Application extens	53 1
	Microsoft.AspNetCore.Authentication.A	11/12/2018 5:29 PM	Application extens	291
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9. Go to Confirming REST API Installation to confirm the installation was configured correctly.

Installing from Command Line

This procedure performs a new installation of REST API using the command line.

Go to Upgrading from the Command Line if REST API has previously been installed on this web server.

- 1. Double-click the batch file (.bat) to unpack the installation files.
- 2. Type cmd in the Windows search bar and select Command Prompt.

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Note: To see the list of optional flags, enter Product.API.deploy.cmd at the command prompt without any flags after it.

3. Type **-g name2021prod.cfg** to create a configuration file where the environment settings are configured, such as environment and institution name. You can use any file name.



Field	Description
<isnew></isnew>	This option determines if this is a new installation or an upgrade to an existing installation. (True, False)
<isproduction></isproduction>	Indicates whether this installation will be performed on a Staging or Production environment. (True, False)
<sitename></sitename>	This field does not need to be updated unless you have already configured multiple web sites on this webserver. The default is Default Web Site.
<virtualdirectory></virtualdirectory>	This field displays the file directory path, which is generated by environment settings. ProductAPI/[InstitutionName]/[IsProduction]
<deploymentfolder></deploymentfolder>	This field displays the folder location for the install, which is generated by environment settings. C:\ProductAPI\[InstitutionName]\[IsProduction]
<productrelgroup></productrelgroup>	Enter the release group, such as Product 2021, that indicates the release group configured.

Field	Description
<productdbname></productdbname>	Enter the database name for the XM webservice.
<institutionname></institutionname>	Enter the institution name as it appears in the virtual directory file path. You can use an abbreviation or shortened name if you prefer.
<environmentname></environmentname>	Determines if this installation will be performed on a Staging or Production environment.
	IMPORTANT! The installation should be performed first in your Staging environment to ensure it is working as expected.

- 4. Save and close the config file.
- 5. Type -n name2021 prod.cfg to run the installation.
- 6. The log file is saved to your local temp file.

Example: C:\Users\username\AppData\Local\Temp\Product\API_20210114\Install.log

- 7. Navigate to the Product.server.config file on the XM server.
- 8. Copy and paste the file to the **REST API** server to the staging or production folder.

		Configuration			
Installation Type					
 New Installation 		Upgrade Existing Installation			
Existing Installation Info				_	
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			1/29/2021 1-44 PM	File folder	
		webassembly	1/25/2021 1:50 PM	File folder	
		www.epot	1/29/2021 1/46 PM	File folder	
		th-Hans	1/29/2021 1:46 PM	File folder	
		zh-Hant	1/25/2021 1:46 PM	File folder	
			1/29/2021 7/04 AME	Application	281
		BouncyCastle,Crypto.dll	1/28/2021 6/02 AM	Application extens	2,8113
		MicrosoftAl,AgentIntercept.dll	6/27/2017 12:59 PM	Application extens	1,9121
		Microsoft.Al.DependencyCollector.dll	5/21/2018 2:55 PM	Application extens	5283
		Microsoft.Al.PerlCounterCollector.dll	5/21/2018 3:06 PM	Application extens	2093
		Microsoft.Al.ServerTelemetryChannel.dll	5/21/2018 B/25 PM	Application extens	1111
		Microsoft Al. WindowsServer.dll	5/21/2018 3:06 PM	Application extens	1101
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9. Go to Confirming REST API Installation to confirm the installation was configured correctly.

Upgrading REST API

This procedure upgrades an existing REST API installation for a configured webserver.

Choose one of the following options to perform the upgrade:

- Run the executable file provided with the download.
- Run the installation from the command line.

Upgrading with the Executable File

This procedure upgrades a current installation using the executable file provided as part of the package file downloaded from Support Center.

- 1. Double-click the executable file (.exe), and then click Next on the first window.
- 2. Review the License Agreement and click Next.

License Agreem	ent		1
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3. Select Upgrade Existing Installation.

11	Configuratio	n	~	5
Installation Type	Incode Existing Installation			
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Installation Folder:				101

4. Click the Browse icon to the right of the Installation Folder field to select the location where the installation was originally performed. Click OK to close the Browse For Folder dialog, and then click Next.

Installation Type		
 New Installation 	Upgrade Existing Installation	
Bisting Installation Info Installation Folder:		
6	Browse For Folder	a
	InstitutionName Istaging	Î
	InstitutionName Staging	
	InstitutionName Staging	

5. On the next window, the environment information is automatically populated to the fields. Confirm the upgrade location and URL.

Note: Updating fields on this window prompts a new installation instead of an upgrade to the existing installation.

audiduori con inguiduori		
Environment	Production Staging	
Environment Name:	production	
nstitution Name:	InstitutionName	
ite To Deploy:	Default Web Ste V	
Artual Directory URL:	/InstitutionName/production	
	http://ocalhost /institutionName/production	
older To Deploy:	VinstitutionName\production	1

Field	Description		
Environment	These options indicate which environment is upgraded. IMPORTANT! The upgrade should be performed first in your Staging environment to ensure it is working as expected.		
Environment Name	The name of the environment, such as staging or production.		
Institution Name	Enter the institution name as it appears in the virtual directory file path. You can use an abbreviation or shortened name if you prefer.		
Site To Deploy	This field does not need to be updated unless you have already configured multiple web sites on this webserver.		
<i>Note:</i> The Virtual Directory URL and Folder To Display fields are populated based on the information provided in these fields.			

6. Click Next to review the installation information displayed the Confirmation window. Then, click Install.



7. Wait while the installation is performed, and then click Close.

Note: Log files are automatically created after the installation process completes. You can view these files by navigating to the locations displayed on this window.

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8. Go to Confirming REST API Installation to confirm the upgrade was configured correctly.

Upgrading from the Command Line

This procedure upgrades an existing installation of REST API using the command line.

- 1. Double-click the batch file (.bat). The installation files are unpacked to the folder where the batch file is saved.
- 2. Type cmd in the Windows search bar and select Command Prompt.

Note: To see the list of optional flags, enter Product.API.deploy.cmd at the command prompt without any flags after it.

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	Command Prompt Desktop app			
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3. Type the install command (-u) and the deployment folder where the original installation was run. Then, press Enter to start the upgrade process.

Example: -u C:\ProductAPI\InstitutionName\staging

The log file is saved to your local temp file. Example: C:\Users\username\AppData\Local\Temp\Product\API_20210114**Install.log**

4. Go to Confirming REST API Installation to confirm the upgrade was configured correctly.

Confirming the Installation

After completing the installation process, follow these steps to confirm the installation has completed successfully.

1. Open a REST API compliant web browser.

Note: Only Google Chrome is supported at this time.

2. Navigate to the documentation for the REST API website location you created during installation. Example:

http://<ServerName>/productAPI/<InstitutionName>/EnvironmentName>/apidoc/index.html#/productAPI/home

3. The XM REST API site loads, indicating your installation has been completed successfully.

Optional: Configuring Log File Settings

This procedure updates the format and location where error log information is saved. These changes are optional. Event logs are already generated to the Windows Event Viewer by default.

1. Navigate to the LoggerConfig.json file on the REST API webserver.

Example: C:\ProductAPI\InstitutionName\staging\LoggerConfig.json

- 2. This file allows you to update the log file settings by updating the following values:
 - Turn the log on or off by setting Log to "Enabled": "True" (on) or "Enabled": "False" (off)
 - Save the log file to the webserver by setting WriteTo > Http "Enabled": "True"
 - Save the log file to the workstation performing the calls: WriteTo > File "Enabled": "True"

Note: The Endpoint Value determines where the log file is saved.

Finastra Support

Finastra support offers several options to help you get the most out of your software, including a self-service Case Management tool, and phone support.

Please visit the Finastra Customer Center at <u>https://customercenter.dh.com/</u> to log in to our online self-service Case Management system. If you forgot your password, simply click the <u>Forgot Password</u> link. Once logged in to Customer Center, you have the ability to use the Knowledge Center to troubleshoot issues and answer questions.

If your financial institution is not currently using these tools and would like to, please contact Finastra support for assistance at 1-800-385-6182 or 1-888-711-0235 for OPS support.

Note: The Financial Modernization Act of 1999, also known as the Gramm-Leach-Bliley Act or GLB Act, includes provisions to protect consumers' personal financial information held by financial institutions. Therefore, Finastra support cannot accept data or screen captures that contain personal financial information via email or fax. For information about secure file transfer methods, contact Finastra support.



The future of digital finance can start here. Consider our planet before printing.

About Finastra

Finastra is building an open platform that accelerates collaboration and innovation in financial services, creating better experiences for people, businesses and communities. Supported by the broadest and deepest portfolio of financial services software, Finastra delivers this vitally important technology to financial institutions of all sizes across the globe, including 90 of the world's top100 banks. Our open architecture approach brings together a number of partners and innovators. Together we are leading the way in which applications are written, deployed and consumed in financial services to evolve with the changing needs of customers. Learn more at <u>finastra.com</u>

North American Headquarters 744 Primera Boulevard Suite 2000 Lake Mary, FL 32746 United States

T: +1 888 989 9009