

# **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:

Procedures in this Guide	
<input type="checkbox"/>	Set up the webserver environment.
<input type="checkbox"/>	Download the installation file and .zip file.
<input type="checkbox"/>	Install or upgrade the REST API webserver.
<input type="checkbox"/>	Confirm the installation.
<input type="checkbox"/>	<b>Optional:</b> 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 [Enabling Web Server \(IIS\) 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.

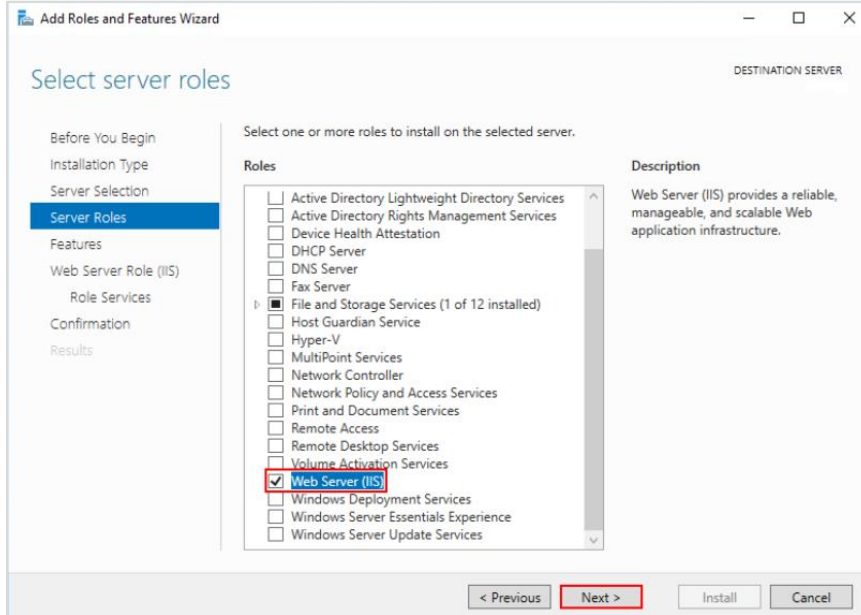
### Need Help?

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

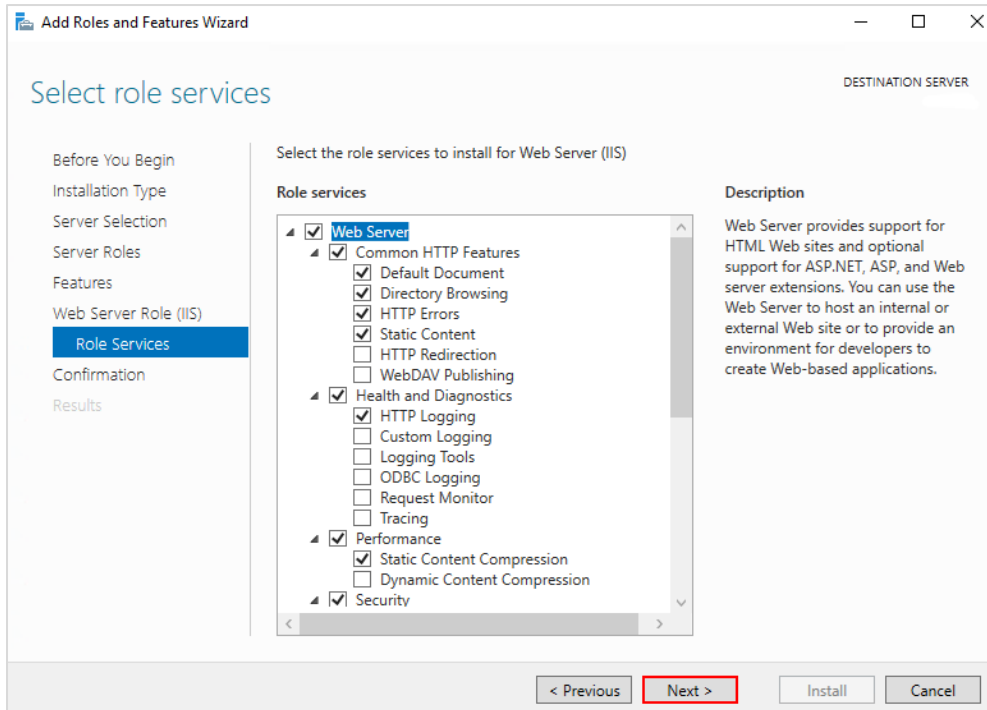
# Enabling Web Server (IIS) Server Role and Role Services

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).



2. 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.



3. 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:

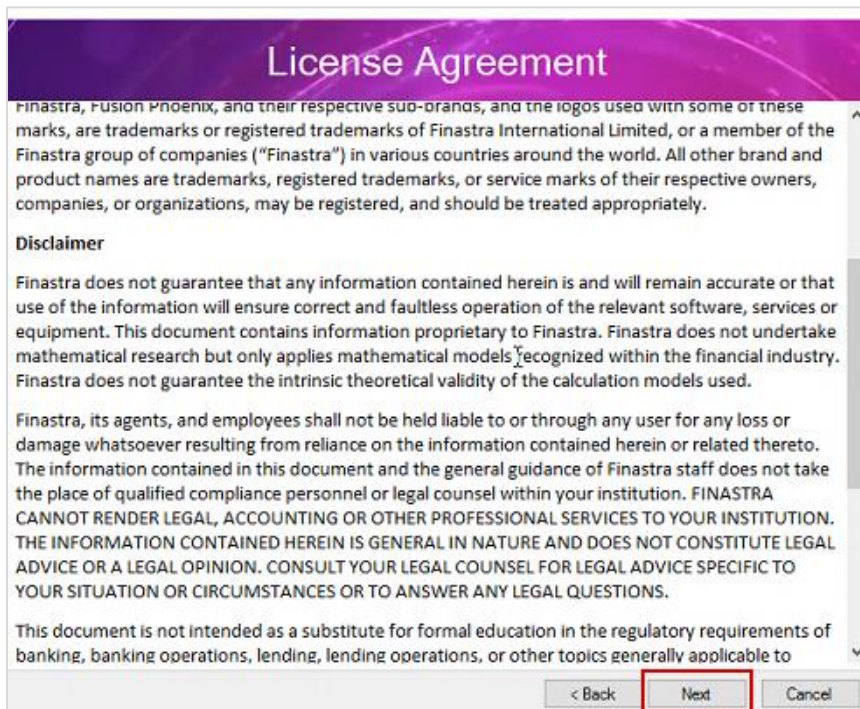
- Run the executable file provided with the download.
- Run the installation from the command line.

## Installing with the Executable File

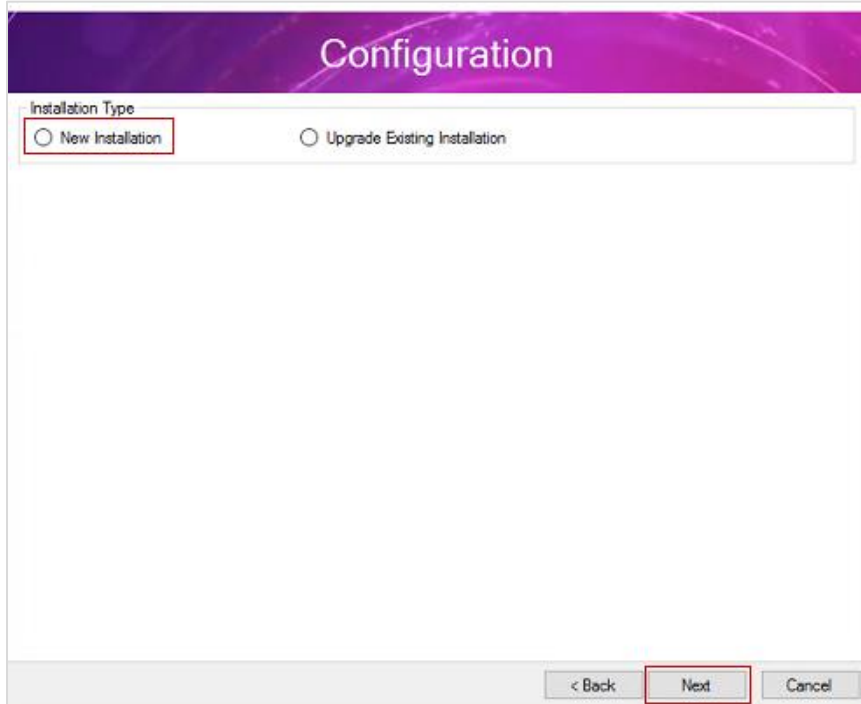
This procedure performs a new installation using the executable file provided as part of the package file downloaded from Support Center.

Go to [Upgrading with the Executable File](#) 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.



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 <b>Staging</b> or <b>Production</b> to indicate the install environment. <b>IMPORTANT!</b> 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.

## New Installation

**Installation Configuration**

Environment:  Production  Staging

Environment Name:

Institution Name:

Site To Deploy:

Virtual Directory URL:

Folder To Deploy:

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

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

## Confirmation

```

Installation Type: Create New
-----
Environment Type: Production
Institution Id: Test2021_1
Environment Name: production
Folder To Deploy: C:\PhoenixAPI\Test2021_1\production
Site: Default Web Site
Virtual Directory: /PhoenixAPI/Test2021_1/production
-----
Log File: C:\[redacted]\Local\Temp\Phoenix
\PHX_API_INST_2101291\Install.log
.NET Core Verion: 3.3.1020 - Microsoft® .NET Framework
.NET Verion: .NET Framework Version: 4.7.2 or later
Directory C:\PhoenixAPI\Test2021_1\production will be created
MSDeploy Location: C:\Program Files (x86)\IIS\Microsoft Web Deploy V2\msdeploy.exe
API Location: C:\[redacted]\AppData\Local\Temp\7z56688.tmp\install\..
\WebDeploy\Phoenix.Api.deploy.cmd
Found Site Name - [Default Web Site]
Created Folder C:\PhoenixAPI\Test2021_1\production

Click Install button to start.
  
```



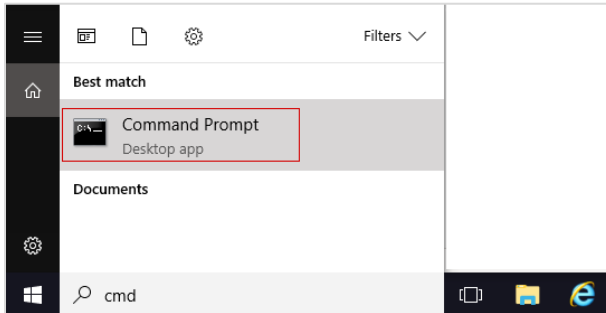


# Installing from Command Line

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

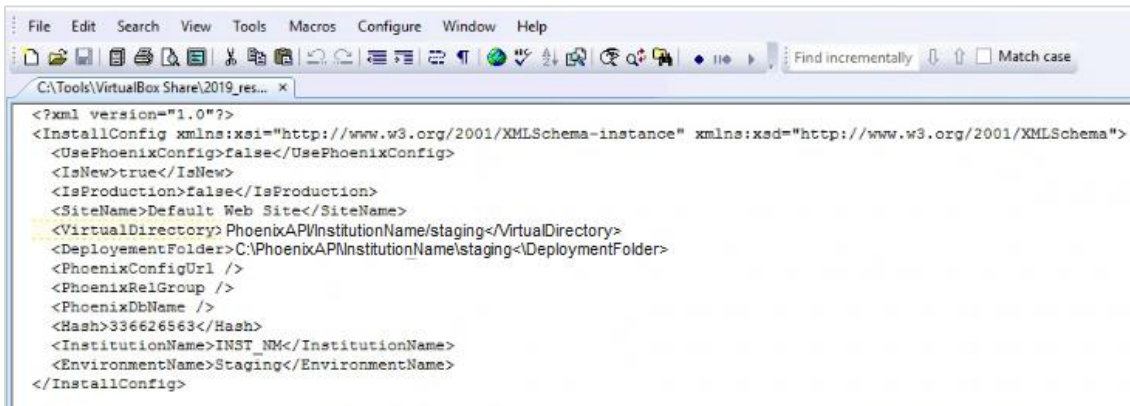
Go to [Upgrading from the Command Line](#) if REST API has previously been installed on this web server.

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



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

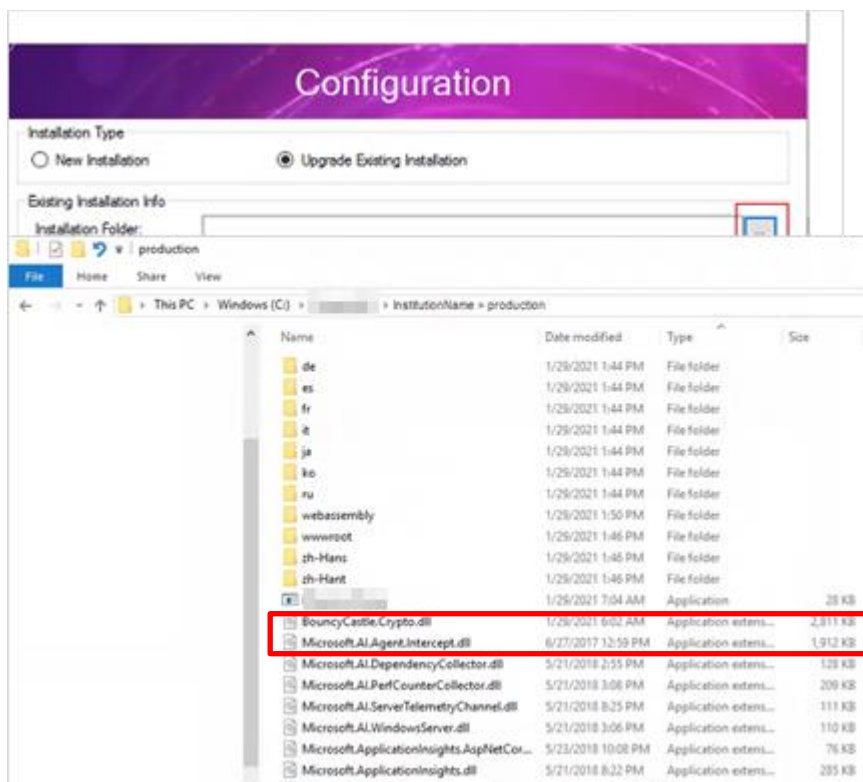
3. Type **-g name2021 prod.cfg** to create a configuration file where the environment settings are configured, such as environment and institution name. You can use any file name.



Field	Description
<IsNew>	This option determines if this is a new installation or an upgrade to an existing installation. (True, False)
<IsProduction>	Indicates whether this installation will be performed on a Staging or Production environment. (True, False)
<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>	This field displays the file directory path, which is generated by environment settings. ProductAPI/[InstitutionName]/[IsProduction]
<DeploymentFolder>	This field displays the folder location for the install, which is generated by environment settings. C:\ProductAPI\InstitutionName\IsProduction]
<ProductRelGroup>	Enter the release group, such as Product 2021, that indicates the release group configured.

Field	Description
<ProductDbName>	Enter the database name for the XM webservice.
<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>	Determines if this installation will be performed on a <b>Staging</b> or <b>Production</b> environment. <b>IMPORTANT!</b> The installation should be performed first in your Staging environment to ensure it is working as expected.

- Save and close the config file.
- Type **-n name2021prod.cfg** to run the installation.
- The log file is saved to your local temp file.  
Example: C:\Users\username\AppData\Local\Temp\Product\API\_20210114\Install.log
- Navigate to the Product.server.config file on the **XM** server.
- Copy and paste the file to the **REST API** server to the staging or production folder.



- 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.

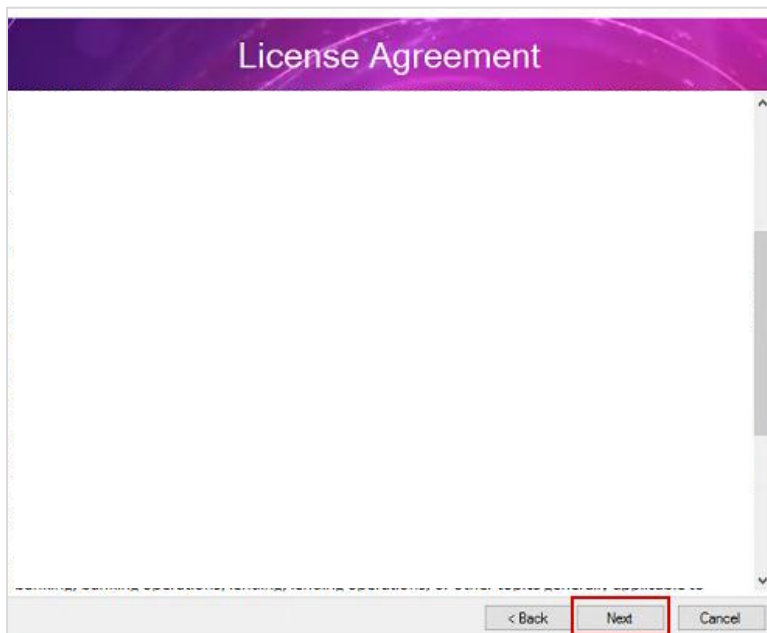
Choose **one** of the following options to perform the upgrade:

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

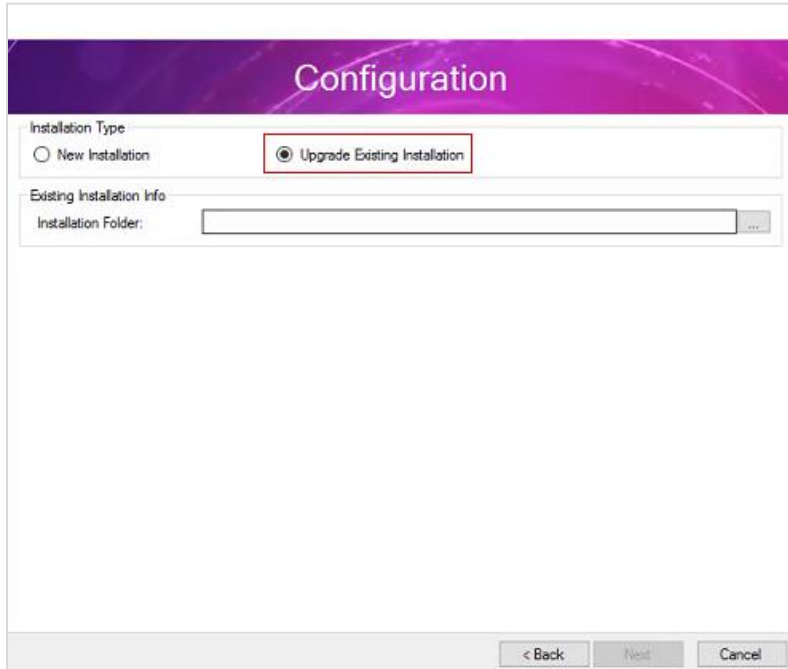
## Upgrading with the Executable File

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

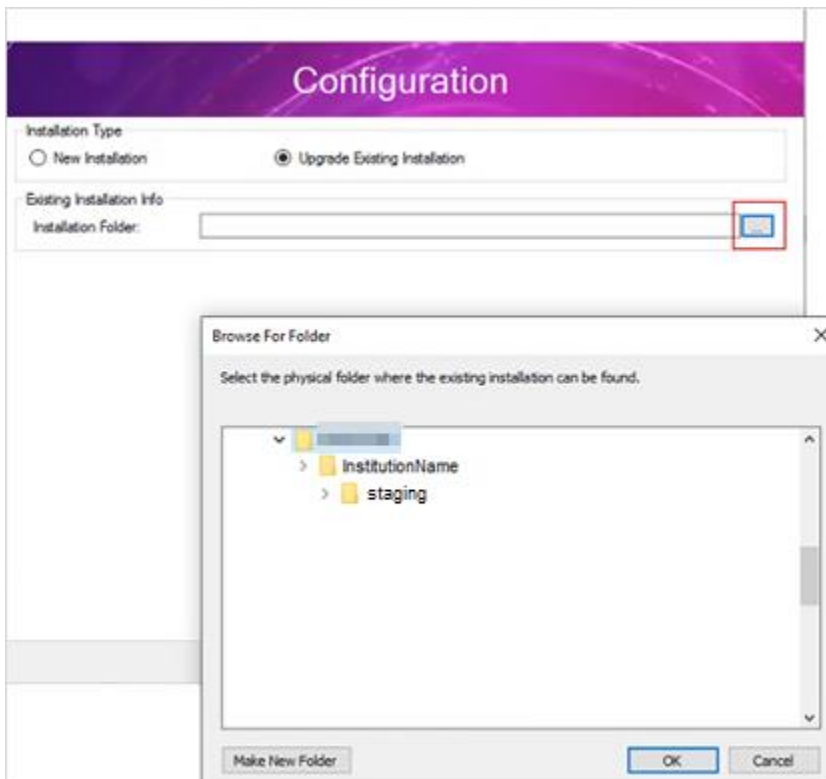
1. Double-click the executable file (.exe), and then click Next on the first window.
2. Review the License Agreement and click Next.



3. Select Upgrade Existing Installation.



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.



- 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.

Field	Description
Environment	These options indicate which environment is upgraded. <b>IMPORTANT!</b> 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.
<b>Note:</b> The Virtual Directory URL and Folder To Display fields are populated based on the information provided in these fields.	

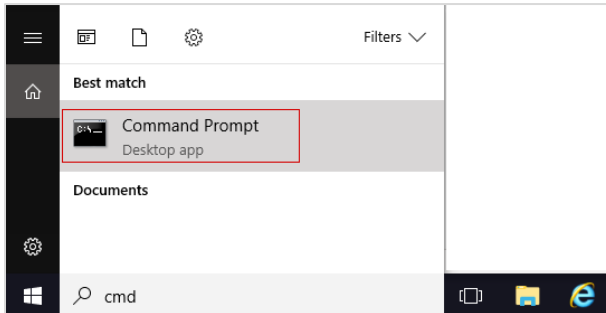


# Upgrading from the Command Line

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.



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>/api-doc/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 <https://customercenter.dh.com/> to log in to our online self-service Case Management system. If you forgot your password, simply click the [Forgot Password](#) 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.



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