

IBM Client Insight for Wealth Management
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*IBM Client Insight for Wealth
Management Solution Guide*

IBM

Note

Before using this information and the product it supports, read the information in "Notices" on page 65.

Product Information

This document applies to Version 1.0.4 and may also apply to subsequent releases.

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Introduction

The IBM Client Insight for Wealth Management solution gives you the information and insight that you need to provide proactive service to your customers.

Audience

This guide is intended for administrators and users of the IBM Client Insight for Wealth Management solution. It provides information on installation, configuration, and use of the IBM Client Insight for Wealth Management solution.

Finding information

To find product documentation on the web, including all translated documentation, access IBM® Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. Some of the components included in the IBM Client Insight for Wealth Management have accessibility features. For more information, see Appendix A, “Accessibility features,” on page 39.

IBM Client Insight for Wealth Management HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

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Chapter 1. Overview

The IBM Client Insight for Wealth Management provides prebuilt analytics that help retail wealth management firms to plan and execute programs for growing and retaining clients and increasing profitability through improved client satisfaction.

The solution includes IBM Predictive Customer Intelligence, a solution data model, reporting and dashboard templates, predictive and prescriptive models, and application interfaces for integration with operational systems. It uses enterprise and third-party data that is related to historical and current transactions, research data, client behavioral information, and household relationships.

Scope of the solution

This version of the solution provides prebuilt models for the following analytics:

- Client behavioral segmentation
- Client peer group analysis
- Household relationship analysis
- Client attrition analysis
- Life event prediction
- Cross- sell propensity
- Email tone analysis
- Tailored news alerts
- Personality Insight

All analytics within the scope of the solution relate to information on the firm's clients and prospects within the limits of the number of clients purchased in the license entitlement. The solution may not be used for analytics other than those in the solution scope described here.

Chapter 2. Using the IBM Client Insight for Wealth Management solution

The IBM Client Insight for Wealth Management solution provides financial advisors with dashboard that help them to understand and provide better service to their clients while also increasing revenue for the company.

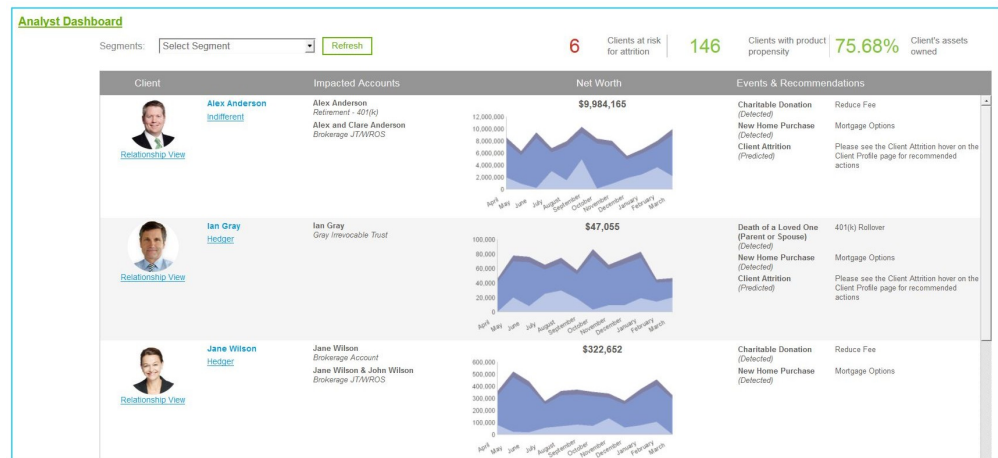
For each client, historical data analysis is used to generate a life event model and transaction history. The solution provides analysis of each client's financial position and also develops a psychographic profile, which defines such things as the customer's willingness to accept risk for the potential of higher returns. The solution uses this information to divide the client base into behavioral segments and provide predictions about each client's life events. The solution provides wealth advisors with suggestions for the best actions to take for each client.

An example of the IBM Client Insight for Wealth Management solution in action

This fictitious example shows how the IBM Client Insight for Wealth Management solution provides insight that helps an investment advisor to provide the best possible recommendations for his clients.

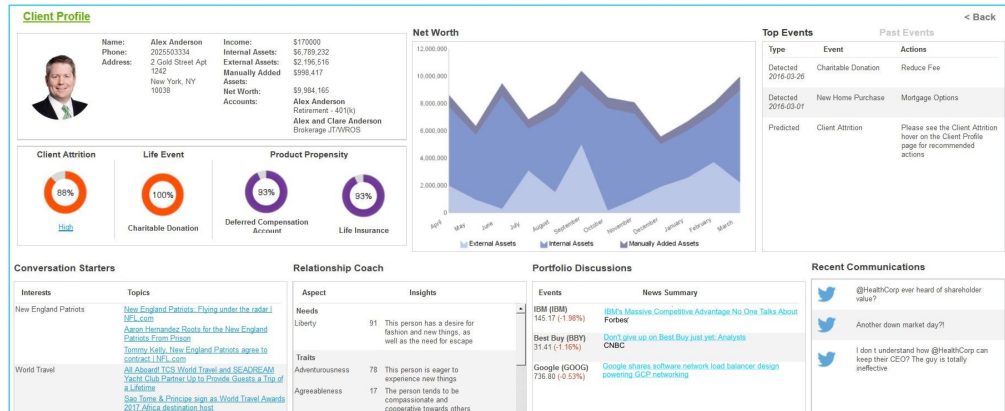
Bruce Sizemore is a financial advisor with 30 clients under management. He would like to take on more clients without reducing the client experience or the level of service he is able to provide. The solution will help Bruce to quickly determine which of his customers require immediate action and provide recommended actions.

Bruce logs in to the solution portlet on his desktop and sees the following view.

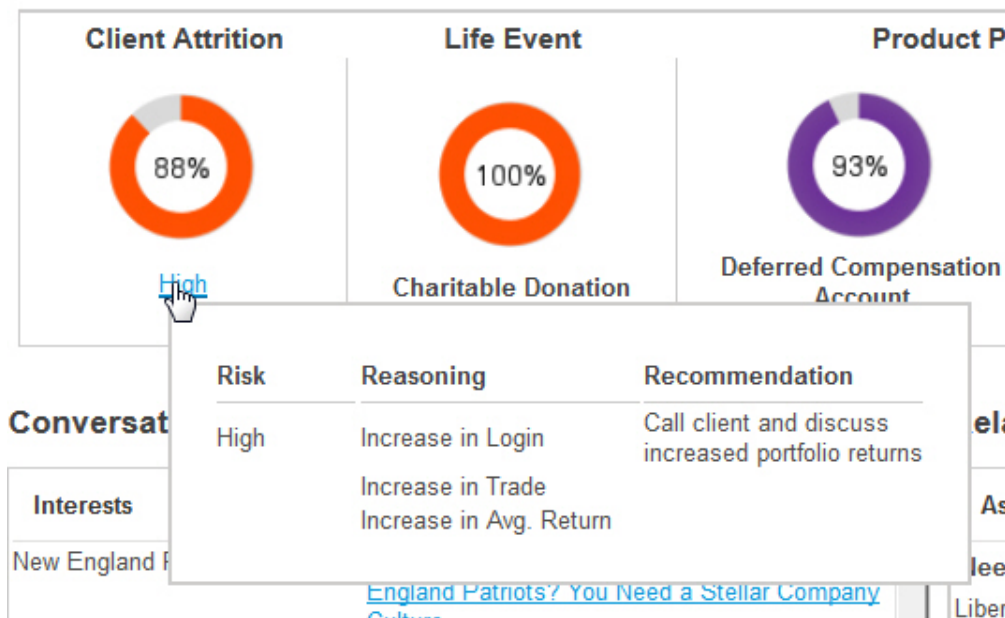


The numbers at the top of the dashboard tell Bruce that six of his clients are at risk of attrition. The first client on the Analyst Dashboard is Alex Anderson, a high net worth customer who is in danger of attrition. Bruce, wants to keep Alex as a client. He clicks Alex's name to go to the Client Profile report.

The **Top Events** section of the Client Profile report for Alex indicates that client attrition is predicted and prompts Bruce to look at the Client Attrition donut chart for the recommended actions.



Bruce sees from the Client Attrition donut chart that Alex has an 88% chance of removing his assets from the company. Bruce clicks below the donut chart to see that the recommended action to avoid Alex's attrition.

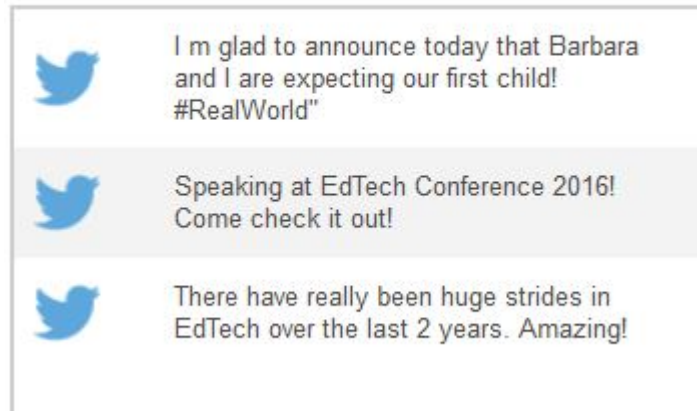


The recommendation is call Alex and discuss increased portfolio returns. The rationale for the recommendation is also shown. Before making a phone call to Alex, Bruce studies the profile to understand how best to interact with Alex. The **Relationship Coach** section provides insight into Alex's personality. The **Conversation Starters** section provides a list of Alex's interests and provides links to articles related to those interests. The **Portfolio Discussions** section provides information on companies in Alex's investment portfolio that are in the news so that Bruce can be up-to-date on recent events related to those investments.

After studying Alex's profile, Bruce gives Alex a call and discusses how he plans to increase the returns from Alex's portfolio. With the insights gained from the Client Profile report, Bruce is able to establish a rapport with Alex, who decides to continue as a client of the firm.

After providing service to Alex, Bruce goes back to the Analyst Dashboard and sees that one of his clients, Ian Gray, is expecting a baby. The birth of a child shows up as a detected event and the Recent Communications section shows a Twitter feed in which Ian announces the birth of his child.

Recent Communications



Bruce phones Ian to congratulate him on the birth of his child and to start a discussion about upgrading his life insurance coverage and starting an education fund for the child.

Chapter 3. Reports

The IBM Client Insight for Wealth Management solution provides reports with dashboard templates, sample predictive models, and application interfaces for integration.

The reports provide information about clients, including financial positions and psychographic profiles based on life event models and transaction history.

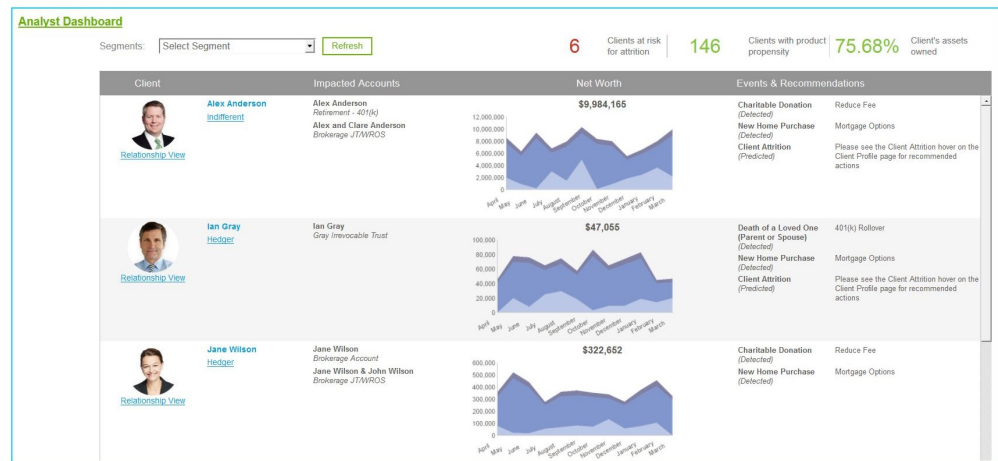
The following analytics reports are provided:

- Analyst Dashboard
- Relationship View
- Segmentation View
- Client Profile

Analyst Dashboard report

When an adviser logs in to the solution, the Analyst Dashboard report provides a list of all clients for that analyst.

The report provides summary information for each client, including a list of their accounts, their net worth, and predicted or detected life events and recommended actions.



The top row of the report delivers the following information:

Segments

Use this box to filter the report if you want to show only clients from the selected segment.

Clients at risk for attrition

Shows the number of clients who show a high probability of leaving the company.

Clients with product propensity

Shows the number of clients that have a high propensity of buying a product from the company.

Client's assets owned

Shows the percentage of the adviser's business that is internal rather than external. If the percentage has increased month over month, it is displayed in green. If it has declined, it is displayed in red. If it remains unchanged, it is displayed in gray.

The body of the report provides summary information for each client, including their accounts, net worth, detected and predicted events and recommendations for action by the adviser. The Net Worth number includes three types of assets:

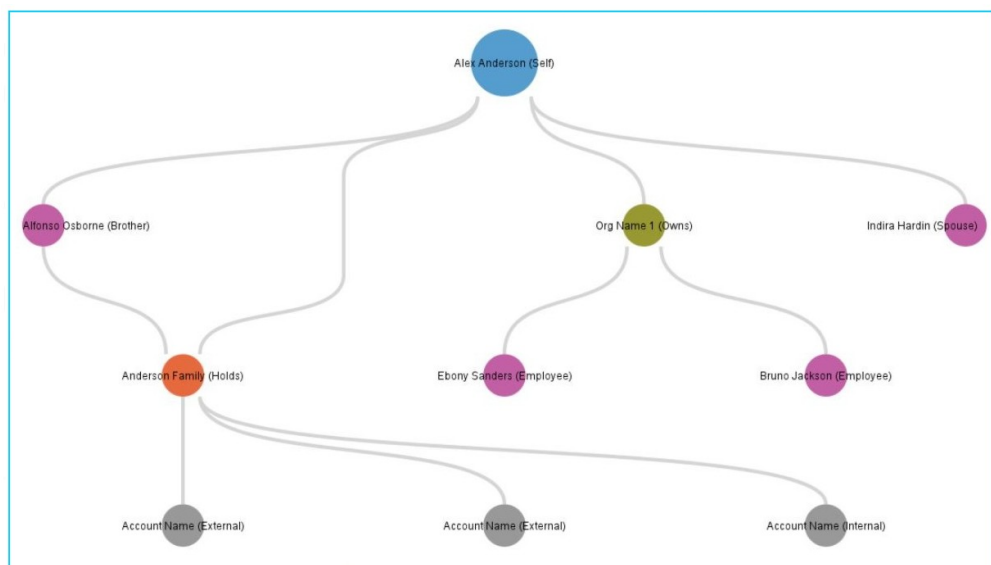
- Internal assets, which include the company's products that are held by the client, for example, units in a mutual fund that is run by the company.
- External assets, which are under management by the company but consist of financial products from other companies, for example, mutual funds that are run by another company.
- Manually-added assets, which include all assets added manually into the system, for example the value of a house.

Click a client's name or picture to see a detailed profile for that client. Click the **Relationship View** link for a visual representation of the client's relationships with other people and companies. Click the name of the segment, for example **Business Owners**, to see details for that segment.

Relationship View report

The Relationship View report provides a visual representation of how a selected client is related to other people, companies, and organizations. The information in this report is not acquired through analytics, but through information that the wealth management company has entered regarding a client's relationships.

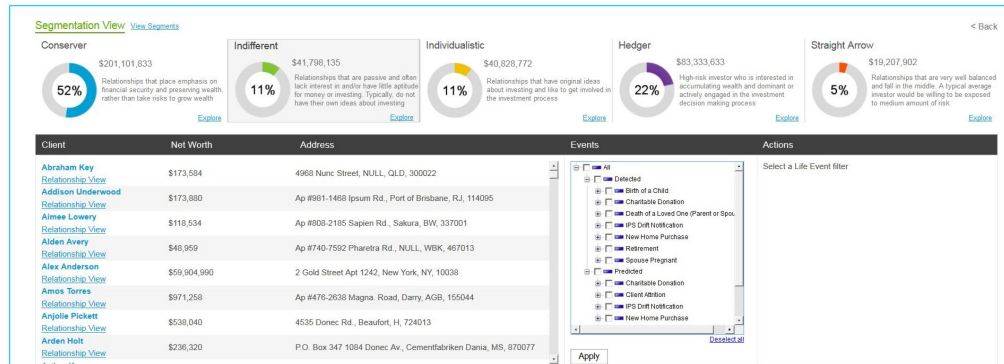
The Relationship View report can be accessed from the Analyst Dashboard report or from the Segmentation View report. It shows an advisor how his client is related to other clients, non-clients, entities, households, and accounts. It helps an advisor to efficiently link prospects to clients. For example, an advisor might ask a satisfied client for a referral to a person who appears in the client's relationship chart.



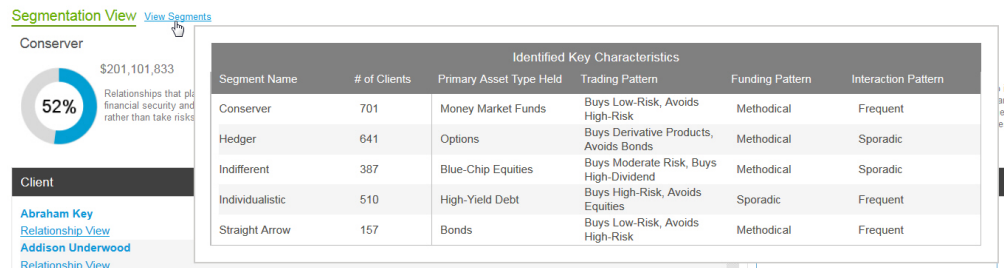
Segmentation View report

The Segmentation View report provides information about a selected segment. You can select any segment to display a list of all clients in that segment, and you can filter the list by detected or predicted life events.

Each segment is represented by a number that represents the net worth for the segment, a donut chart that shows the percentage of the total net worth of all the advisor's clients, and a brief description of the segment. To show a list of clients in a segment, click the **Explore** link for that segment.



You can also view a pop-up window that indicates the key characteristics for a selected segment by clicking the **View Segments** link beside the report title.



With the **Life Event** filter, you can select detected and predicted events to filter the list of clients. For example, to see a list of clients who have recently bought a home, you would select **New Home Purchase** in the **Detected** branch of the filter. After you apply the filter, the list includes only clients who have recently purchased a home.

From the client list, you can click the client's name for details about the client or click **Relationship View** to see the client's relationships.

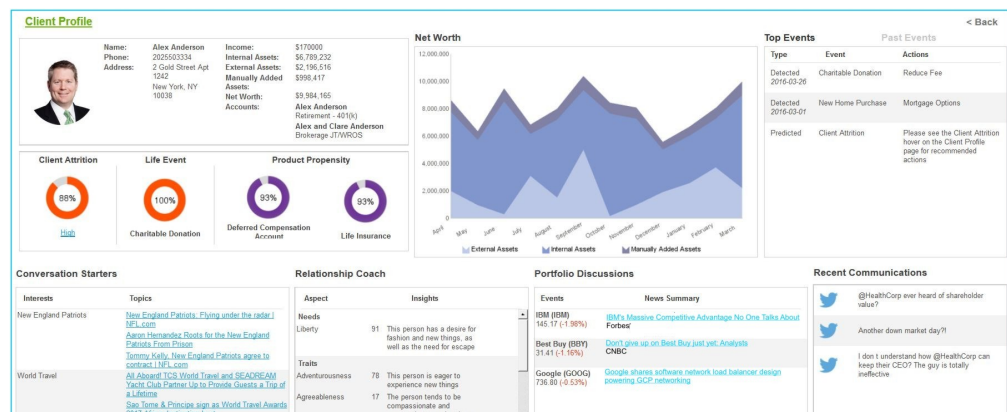
Client profile report

The Client Profile report provides details about a client and recommended actions for the financial advisor.

The report contains contact the following information for the client:

- Contact information
- Income
- Internal Assets, which shows the market value of the client's assets that are under management by the wealth management firm

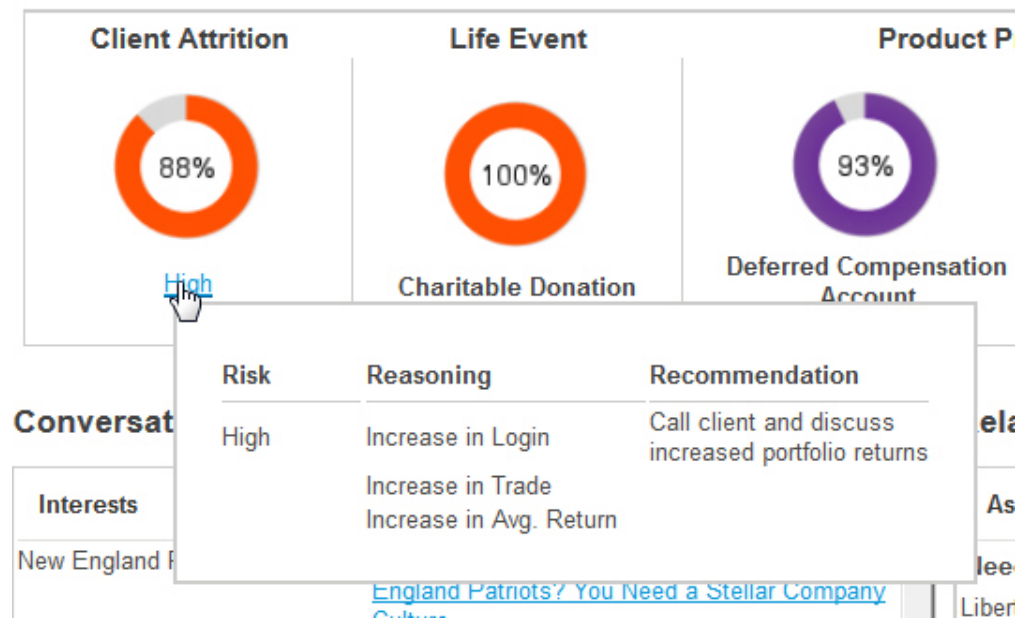
- External Assets, which shows the market value of the client's assets that are not being managed by the wealth management firm
- Net Worth, which is represented by a number and also by a chart that shows changes in net worth over the past year and the proportion of internal assets relative to external and manually-added assets
- Top Events, which lists events detected in the past month and also lists events that are predicted to occur in the future.
- Past Events, which shows only detected events that have occurred in the past.
- Charts that show Client Attrition, along with the reasoning (provided in a pop-up window), Top Life Event (detected or predicted) and the top two product propensities.
- Conversation Starters, which provide links to recent articles that relate to the client's interests. It uses the Alchemy API
- Relationship Coach, which provides an overview of the client's personality and insights that will help the financial advisor understand how to interact with the client. The Relationship Coach functionality uses Watson Personality Insights to ingest unstructured text from clients and develop a psychographic profile on the client. It also provides insights tied to any upper quartile (> 75%) or lower quartile value (<25%).
- Portfolio Discussions, which provides links to recent news related to investments in the client's portfolio. It uses the Tailored News and Alerts model to crawl a data source, such as news data, and provide summarized text outputs and rate the sentiment of each article. The Tailored News and Alerts model is implemented using the Alchemy API, Watson Explorer, and Classifier4J. It returns news on a client's portfolio and stock information.
- Recent Communications, which shows recent comments and communications by the client through social media and email interactions



Client Attrition predicts the likelihood of the client removing their business from the company. It uses such data points as, but not limited to, the client's wealth investment data, tenure with the company, monthly number of logins, number of calls, and trades. Included in the analytics that predict attrition is the Email Tone Analyzer. It analyzes the general tone of the client towards the firm, based on past internal interaction data, such as emails or Twitter. It categorizes word sentiment based on a custom library and uses it for extracting scores. This library can be extended to any line of business and incrementally built upon.

The Client Attrition model also provides the rationale for the prediction and provides a recommendation. You can hover your mouse pointer over the link below the Client Attrition donut chart to display the reasoning and

recommendation.



Chapter 4. Creating and managing customer segments

In the IBM Client Insight for Wealth Management solution, users with the appropriate permissions can add, edit, or delete behavioral customer segments by using the Segmentation Tool.

For more information, see “Customizing segments” on page 56

The following screen capture shows the Segmentation Tool page when it is opened. When the **Hints** control is set to **ON**, a description is displayed when you hover your mouse pointer over each field on the page.

The following table shows the categories that are available:

Table 1. Wealth data dictionary

Categories	Sub-categories
ASSETS	Bonds, Commodities, Credits, Derivatives, Estate Funds, Forex, Money Market, Stocks, Others
TRADING	Bonds, Commodities, Credits, Derivatives, Estate Funds, Forex, Money Market, Stocks, Others
FUNDING	Regular, Rare, Lumpy
INTERACTION	Rare, Frequent, Less Frequent

The categories are defined based on the customer transactions data.

ASSETS

Assets owned by the user in any of the listed sub-categories.

TRADING

Trading activity performed by the user in any of the listed sub-categories.

FUNDING

Funding pattern for the user.

INTERACTION

Interaction pattern for the user. Implies interaction with the wealth manager.

With the Segmentation Tool you can create or change the rules that determine which customers are assigned to each segment. The tool uses mean and standard deviation to target certain percentages of customers.

For example, if you want to create a segment for the top 25 percent of customers who have assets consisting mostly of stocks , you select **Assets** as the category and **Stocks** as the value. You choose **greater** in the **Operator** field, choose **plus** in the +/- field, and type 0.67 in the **Multiplier/Count** field. If you want to select the top 10 percent of customers, you would use 1.28 as your multiplier. Mean and standard deviation are automatically calculated based on the data in your database.

Editing a segment

In the IBM Client Insight for Wealth Management solution, you can use the Segmentation Tool to make changes to an existing customer segment.

Procedure

1. Open the Segmentation Tool page.
2. In the **Segment Name** box, select the segment that you want to edit.
3. Click **Edit**.
4. To change an existing rule, in the Definition section, you can select a different operator, +/-, and multiplier/count. You can delete an existing rule by clicking **X** for the rule. To clear all rules, click **Clear**.

Note: If you select **range** as your operator, then +/- is automatically selected. Some categories may not require you to choose an operator, +/-, or multiplier/count.

5. To add a new rule to the segment, select a category, and click **Add Rule**. A new line is added to the Definition section of the page.
6. Click **Update** to save your changes.

Deleting a segment

In the IBM Client Insight for Wealth Management solution, you can use the Segmentation Tool to delete an existing customer segment.

Procedure

1. Open the Segmentation Tool page.
2. In the **Segment Name** box, select the segment that you want to delete.
3. Click **Delete**.

Adding a new segment

In the IBM Client Insight for Wealth Management solution, you can use the Segmentation Tool to add a new customer segment.

Procedure

1. Open the Segmentation Tool page.
2. Click **Add New**.
3. In the **Segment Name** box, type a name for the new segment.
4. In the **Category** box, select the category of rule that you want to add to the new segment, and click **Add Rule**. A line is added to the Definition section of the page.

Note: If you select **range** as your operator, then +/- is automatically selected. Some categories may not require you to choose an operator, +/-, or multiplier/count.

5. To add more rules, repeat step 4.
6. After you define all the rules that you want to add to the new segment, click **Submit**.

Chapter 5. Installation and configuration

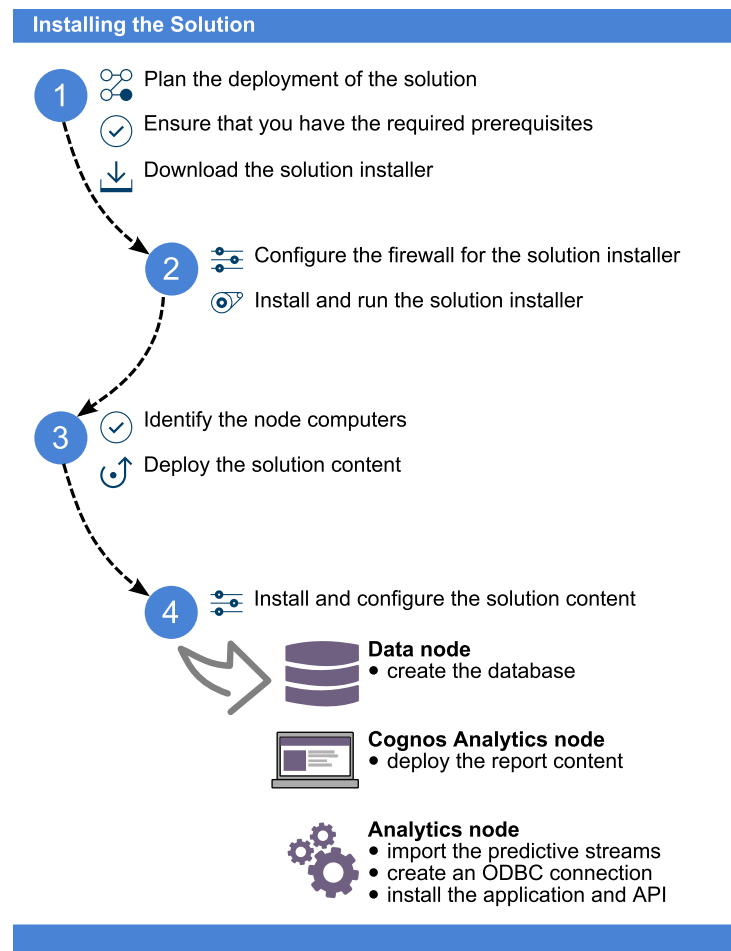
The installation and configuration of the IBM Client Insight for Wealth Management solution involves downloading the solution package from Passport Advantage and then configuring the various parts of it within your environment.

The solution is for use with IBM Predictive Customer Intelligence.

Overview of the installation and configuration process

There are several groups of tasks that you must complete to install and configure the IBM Client Insight for Wealth Management solution.

The following diagram provides a high-level overview of the installation and configuration process. If you are viewing this diagram from the IBM Knowledge Center, you can click on a task to go to the procedure for that task.



To install the solution, you must complete the following tasks:

1. On the computer from which you want to install the solution, download the tar.gz file from IBM Passport Advantage.
2. Plan where you want the various parts of the solution to reside.

3. Open the ports that are required for the installation. You can do this by running the `firewall.sh` script, manually opening the ports on the installation node, or disabling the firewall. You also must open ports on the other node computers that are used for the solution.
4. On the installation computer, run the `setup.sh` file to install the solution installer, and then run the solution installer to deploy files to the locations that you specify.
5. On the Data node computer, create the DB2 database.
6. On the Analytics node computer, import the SPSS project streams, models, and rules.
7. On the Analytics node computer, configure the data view for the SPSS models.
8. On the Cognos Analytics node computer, install the Cognos content.
9. On either the Cognos Analytics node or Analytics node computer, install the EAR file.

Planning the installation and configuration of the solution

Prepare a deployment plan to specify which part of the solution is to be deployed and on which computer node.

Note: Ensure that the system ports that will be used by this solution are not used by any other application.

Prerequisites

Before you install the IBM Client Insight for Wealth Management solution, there are prerequisites that must be met.

The following conditions must be met before the solution is installed:

- IBM Predictive Customer Intelligence version 1.1.1 is installed and configured and you have applied all known fix packs.
- If you are installing to a Linux environment and plan to use the Solution Installer, you have a Red Hat Enterprise Linux operating system that you can install to. The Solution Installer works only on that version of Linux.
- You understand your deployment environment. There is a combination of nodes that you must install to, so you must determine where you want the various components of the solution to reside.
- You have administration rights and the ability to copy files between computers.

Contents of the download package

The IBM Client Insight for Wealth Management package, which you download from Passport Advantage, contains several parts.

The following parts are included in the package:

- Solution installer (if you chose the Linux package)
- DB2 databases
- SPSS project streams, models, and rules
- Cognos Analytics reports and Dynamic cube models
- EAR file that contains the REST APIs

Downloading the solution

You must download the IBM Client Insight for Wealth Management solution from IBM Passport Advantage.

Before you begin

You must have a Passport Advantage account and be entitled to the package.

About this task

Passport Advantage contains package repositories. Instead of downloading the package from Passport Advantage and creating a repository locally, you access the repository on Passport Advantage.

For more information about downloading the product, see the download document (www.ibm.com/support/docview.wss?uid=swg24042325).

Procedure

1. Set the Passport Advantage preference to **Connect to Passport Advantage**.
2. Download the tar.gz file
3. Move the tar file to the computer from which you want to run the installation.
4. Decompress the file.

Modifying the sudoers file for the Linux user who runs the installation

To run the IBM Client Insight for Wealth Management installation in a Linux environment, you must be either root user or have sudo permission on each node computer, and you must disable requiretty during the installation.

To install with sudo user permissions, you must add the user to the sudoers file.

Procedure

1. Log in as root user.
2. Enter the following command to open the sudoers file for editing:
`visudo -f /etc/sudoers`
3. Locate the following line:
`Defaults requiretty`
4. Press the I key to insert text.
5. Type a number sign (#) in front of `Defaults requiretty` to comment out the line. For example, the line will appear as `#Defaults requiretty`
6. If you run the installer as a user with sudo user permissions, go to the end of the file, and add the following line for your user:
`username ALL=(ALL) NOPASSWD: ALL`
7. Press the Esc key, and enter `:wq` to save and close the file.
8. Repeat these steps on each computer on which you install a IBM Client Insight for Wealth Management node.

Configuring computer firewall settings required for the installation on Linux

The Solution Installer requires bidirectional communication with each node when you install a server component or server artifact component, and your firewall can interfere with this communication.

To ensure bidirectional communication, you must configure your firewall settings for the installation. Alternatively, you can temporarily disable your firewall during the installation.

A script is provided to open all necessary ports on the installation node. You can either use the `firewall.sh` script, open the ports manually, or disable the firewall settings.

In addition to opening ports on the installation node computer, you must open some ports on each computer to which content from the solution will be copied. You can either disable all firewall settings temporarily or use the `firewall.sh` script, as described in this document.

Disabling firewall settings prior to installation with the Solution Installer (optional)

If you choose to temporarily disable your computer's firewall during the installation of the IBM Client Insight for Wealth Management solution, ensure that you enable the firewall on each node after the installation is complete.

About this task

Important: If you disable your computer's firewall during the installation, you must still ensure that the required ports are opened on each node computer when you restart your firewall.

Procedure

1. Log on to the computer as the root user or as a user with sudo permissions.
2. Type the following command:

```
/etc/init.d/iptables stop  
/etc/init.d/iptables save
```
3. Repeat these steps on each computer on which you install a node and on the server from which you are running the installation.

What to do next

After the installation is complete, on each node, type `/etc/init.d/iptables start` to restart your firewall.

Configuring your firewall settings on the installation node computer by using the firewall script

You can run the `firewall.sh` script to open the ports on a Linux installation node.

About this task

The firewall.sh script opens the following ports on the solution installer node:

- 8080 incoming
- 443 incoming
- 9683 incoming
- 22 outgoing

Procedure

1. As the root user or as a user with sudo permissions, log on to the computer that contains the solution installer node.
2. Back up your existing firewall settings by typing the following command:
`/etc/init.d/iptables save`.
3. Run the firewall.sh script.

Manually configuring firewall settings on the installation node

If you prefer not to disable your firewall settings or use the firewall.sh script, you can manually configure your firewall settings on the installation node.

Procedure

1. As the root user or as a user with sudo permissions, log on to the computer that contains the solution installer node .
2. Back up your existing firewall settings by typing the following command: `. /etc/init.d/iptables save`
3. On the computer that contains the solution installer node, add rules for the ports that are required by the installer by typing the following commands:

```
iptables -I INPUT -p tcp --dport 8080 -j ACCEPT
iptables -I OUTPUT -p tcp --sport 8080 -m state --state
RELATED,ESTABLISHED -j ACCEPT

iptables -I INPUT -p tcp --dport 443 -j ACCEPT
iptables -I OUTPUT -p tcp --sport 443 -m state --state
RELATED,ESTABLISHED -j ACCEPT

iptables -I INPUT -p tcp --dport 9683 -j ACCEPT
iptables -I OUTPUT -p tcp --sport 9683 -m state --state
RELATED,ESTABLISHED -j ACCEPT

iptables -I OUTPUT -p tcp --dport 22 -j ACCEPT
iptables -I INPUT -p tcp --sport 22 -m state --state
RELATED,ESTABLISHED -j ACCEPT
```

Configuring firewall settings on other computers that will contain content from the solution

On all node computers to which content from the solution will be copied, the ports 443, 9683, and 8080 must be opened for the installation process.

Procedure

1. On each of the computers to which content for the solution will be copied, add rules for the ports that are required by the installer by typing the following commands:

```
iptables -I OUTPUT -p tcp --dport 443 -j ACCEPT
iptables -I INPUT -p tcp --sport 443 -m state --state RELATED,ESTABLISHED -j ACCEPT
iptables -I OUTPUT -p tcp --dport 9683 -j ACCEPT
iptables -I INPUT -p tcp --sport 9683 -m state --state RELATED,ESTABLISHED -j ACCEPT
```

```
iptables -I OUTPUT -p tcp --dport 8080 -j ACCEPT
iptables -I INPUT -p tcp --sport 8080 -m state --state RELATED,ESTABLISHED -j ACCEPT
```

2. Type the following command to save your firewall settings:
`/etc/init.d/iptables save`
3. Type the following command to restart your firewall:
`/etc/init.d/iptables restart`
4. Verify that your changes are applied by using the following command:
`iptables -L`
The added port appears in the list.
5. Repeat these steps on each computer on which you will install an IBM IBM Client Insight for Wealth Management node.

The solution installer

The solution installer provides automation that helps you to install the solution.

The solution installer runs on the latest versions of Chrome and Firefox. It is not tested on Safari and does not run on Internet Explorer.

The solution installer provides the following functionality:

- Deployment of the required files to defined nodes.
- The option to create a new configuration or start from a configuration that you previously saved.
- Automated validation.
- Electronic license acceptance.
- Automated clean-up of installed files if the license is declined.

The `setup.sh` script installs `nodejs`, `Chef client`, and `Chef server`. It extracts and uploads the cookbooks and sets up everything so that Chef can be used to install the software.

Installing the Solution Installer software

Before you use the Solution Installer to configure and deploy the nodes in a Linux environment, you must install the Solution Installer.

Before you begin

The working directory for solution installation files is `opt/IBM`

About this task

Here is a short video that shows you how to install the Solution Installer:

<http://youtu.be/9u6ZOk8iyt4>

Please note the version numbers shown in the video may have been updated (the video will still be relevant). The steps that are shown in the video are described in the following procedure.

Procedure

1. Log on to the computer where you downloaded the solution package.
2. Decompress the solution package.

3. If the Solution Installer (including the IBM Predictive Customer Intelligence Solution Installer) has been run on the computer previously, run the following command on each of the nodes:

```
./cleanupClient.sh
```

4. Go to the Solution Installer directory in the following location:
`opt/IBM/IS_Wealth_Customerinsight_1.0.1/SolutionInstaller`.
5. If you haven't already opened the ports that are required by the Solution Installer, you can open them by running the following command:

```
./firewall.sh
```

6. Enter the following command:

```
sh setup.sh username first_name last_name email password
```

This command creates a user (with the details supplied) for accessing the Solution Installer web server.

The web server is started and the URL for the Solution Installer displays in the command line window.

7. A browser window might open automatically. If it doesn't, copy and paste the URL into a web browser and bookmark it.

What to do next

Use the Solution Installer to deploy the installation files to the nodes in your solution.

Deploying the installation files on the nodes

You use the Solution Installer to deploy the installation files to the appropriate nodes in your solution.

Before you begin

Ensure that you know the URL for accessing the Solution Installer.

Ensure that you know the following information for each of the nodes in your solution:

- Host name or IP address
- A user ID and password that has write permissions to the `/opt/` directory.

Each node must also meet the following requirements:

- Has a valid DNS name that is resolvable.
- Does not have Chef server or client software installed on it.

About this task

In this task, you create an installation configuration of your solution by dragging objects onto a canvas, adding components to the objects, and defining properties for the components.

Important: The Solution Installer runs on the latest versions of Chrome and Firefox. It does not run on Internet Explorer and it is untested on Safari.

Procedure

1. In a web browser, go to the Solution Installer.
2. Read the license agreement and click **Accept**.

3. Click **New Configuration** and then click **OK**.
4. From the **Mandatory Content List** pane, select **Node**.
A visual representation of an empty node is displayed on the canvas.
5. In the **Property Editor**, type a name for the node, and in the **Host Name** box, specify the server on which the node will be placed.
For example, you might create a node that is named Cognos Analytics node (or Cognos BI node).
6. Enter a username and password for a user that has sudo access.
If you click **Validate** before all the mandatory content is added, a message indicates that the node is not valid. For example, if you validate the Cognos Analytics node before adding Cognos Analytics (BI) content, then a message indicates that the node is not yet valid.
7. From the **Optional Content** list, drag any content that you want to add into the appropriate node. The reason that this content is optional is because you might already have some of the necessary components installed in your environment.
8. For every node that you want to add content to, define the node and then drag content objects onto it.
9. If you want to save the configuration to use or refer to in the future, click **Save Configuration**.
10. Click **Validate**. The progress of the validation is displayed. If the validation fails, look at the log file to troubleshoot the problem.
11. After all nodes are defined, the contents are specified, and each node is validated, click **Run**. The scripts and files that are used to install and configure the solution are copied to the target nodes.

What to do next

Complete the installation of the solution on each of the nodes.

Creating the database

Before you can use the IBM Client Insight for Wealth Management solution, you must create a database.

About this task

There are two scripts to be run; one to create the database, and another to populate the database. The solution installer will have copied the compressed file to your data node computer.

Procedure

1. Log on to the data node computer as root user.
2. On the data node computer, if the compressed file is not already decompressed, then decompress it.
3. Open a terminal window, and go to the directory where the content files were decompressed.
4. Type the following command to change the permissions for the files:
`chmod 755 *sh`
5. Change to the database instance owner.
For example, `su db2inst1`

6. In the decompressed folder, run the `./Install_DB.sh` script.
7. Do one of the following actions:
 - If you want to load the sample data that is provided with the solution, then run the `./Load_Data.sh` script.
 - If you do not want to load the sample data, then run the following SQL commands:

```

INSERT INTO PCIWLTH.CUSTOMER_SEGMENT_MINI_DIMENSION (ANNUAL_INCOME,
IMPORTANCE_RATING,LOYALTY_RATING,MARKET,NET_WORTH,PERFORMANCE_RATING,PERFORMANCE_STATUS,
POPULATION_DATE,POPULATION_DESCRIPTION,POPULATION_TIME,PRIMARY_BRANCH_PROXIMITY,
PROFITABILITY,RELATIONSHIP_AGE,RELATIONSHIP_VALUATION,RETENTION_RATING,
SATISFACTION_RATING,SEGMENT_NAME,SOURCE_SYSTEM_CODE,SOURCE_SYSTEM_NAME,
UNIQUE_ID_IN_SOURCE_SYSTEM) values(null,null,null,null,null,null,null,null,
null,null,null,null,null,null,null,null,'Conserver',null,null,null);
INSERT INTO PCIWLTH.CUSTOMER_SEGMENT_MINI_DIMENSION (ANNUAL_INCOME,IMPORTANCE_RATING,
LOYALTY_RATING,MARKET,NET_WORTH,PERFORMANCE_RATING,PERFORMANCE_STATUS,POPULATION_DATE,
POPULATION_DESCRIPTION,POPULATION_TIME,PRIMARY_BRANCH_PROXIMITY,PROFITABILITY,
RELATIONSHIP_AGE,RELATIONSHIP_VALUATION,RETENTION_RATING,SATISFACTION_RATING,
SEGMENT_NAME,SOURCE_SYSTEM_CODE,SOURCE_SYSTEM_NAME,UNIQUE_ID_IN_SOURCE_SYSTEM)
values(null,null,null,null,null,null,null,null,null,null,null,null,null,null,
null,null,'Indifferent',null,null,null);
INSERT INTO PCIWLTH.CUSTOMER_SEGMENT_MINI_DIMENSION (ANNUAL_INCOME,IMPORTANCE_RATING,
LOYALTY_RATING,MARKET,NET_WORTH,PERFORMANCE_RATING,PERFORMANCE_STATUS,POPULATION_DATE,
POPULATION_DESCRIPTION,POPULATION_TIME,PRIMARY_BRANCH_PROXIMITY,PROFITABILITY,
RELATIONSHIP_AGE,RELATIONSHIP_VALUATION,RETENTION_RATING,SATISFACTION_RATING,
SEGMENT_NAME,SOURCE_SYSTEM_CODE,SOURCE_SYSTEM_NAME,UNIQUE_ID_IN_SOURCE_SYSTEM) values
(null,null,null,null,null,null,null,null,null,null,null,null,null,null,
null,'Straight Arrow',null,null,null);
INSERT INTO PCIWLTH.CUSTOMER_SEGMENT_MINI_DIMENSION (ANNUAL_INCOME,IMPORTANCE_RATING,
LOYALTY_RATING,MARKET,NET_WORTH,PERFORMANCE_RATING,PERFORMANCE_STATUS,POPULATION_DATE,
POPULATION_DESCRIPTION,POPULATION_TIME,PRIMARY_BRANCH_PROXIMITY,PROFITABILITY,
RELATIONSHIP_AGE,RELATIONSHIP_VALUATION,RETENTION_RATING,SATISFACTION_RATING,
SEGMENT_NAME,SOURCE_SYSTEM_CODE,SOURCE_SYSTEM_NAME,UNIQUE_ID_IN_SOURCE_SYSTEM) values
(null,null,null,null,null,null,null,null,null,null,null,null,null,null,
null,'Individualistic',null,null,null);
INSERT INTO PCIWLTH.CUSTOMER_SEGMENT_MINI_DIMENSION (ANNUAL_INCOME,IMPORTANCE_RATING,
LOYALTY_RATING,MARKET,NET_WORTH,PERFORMANCE_RATING,PERFORMANCE_STATUS,POPULATION_DATE,
POPULATION_DESCRIPTION,POPULATION_TIME,PRIMARY_BRANCH_PROXIMITY,PROFITABILITY,
RELATIONSHIP_AGE,RELATIONSHIP_VALUATION,RETENTION_RATING,SATISFACTION_RATING,
SEGMENT_NAME,SOURCE_SYSTEM_CODE,SOURCE_SYSTEM_NAME,UNIQUE_ID_IN_SOURCE_SYSTEM) values
(null,null,null,null,null,null,null,null,null,null,null,null,null,null,
null,null,'Hedgers',null,null,null);
INSERT INTO PCIWLTH.CUSTOMER_SEGMENT_MINI_DIMENSION (ANNUAL_INCOME,IMPORTANCE_RATING,
LOYALTY_RATING,MARKET,NET_WORTH,PERFORMANCE_RATING,PERFORMANCE_STATUS,POPULATION_DATE,
POPULATION_DESCRIPTION,POPULATION_TIME,PRIMARY_BRANCH_PROXIMITY,PROFITABILITY,
RELATIONSHIP_AGE,RELATIONSHIP_VALUATION,RETENTION_RATING,SATISFACTION_RATING,
SEGMENT_NAME,SOURCE_SYSTEM_CODE,SOURCE_SYSTEM_NAME,UNIQUE_ID_IN_SOURCE_SYSTEM) values
(null,null,null,null,null,null,null,null,null,null,null,null,null,null,
null,null,'Others',null,null,null);

```

What to do next

Verify that the tables are created and the data is successfully loaded into the input tables by checking the `out.log` file, which on Linux operating systems is in the `db2inst1` home directory. In the log file, search for the text: rows were rejected. The value should be zero. If it is not, there are data load issues.

Creating and running stored procedures

If, when you created the database for the IBM Client Insight for Wealth Management solution, you chose not to load the sample data, then you need to run additional commands to create and run stored procedures. If you loaded the sample data, then you do not need to complete this task.

Before you begin

Save the SEGMENT_SUMMARY_PATTERN procedure into the SEGMENT_SUMMARY_PATTERN.sql file.

Procedure

Go to the following location to download the code for creating the stored procedures: Industry Solutions techdoc (<http://www.ibm.com/support/docview.wss?uid=swg27046047>).

Importing IBM SPSS project streams, models, and rules

IBM SPSS® project streams, models, rules, and other artifacts are contained in a repository export file (.pes) for the IBM Client Insight for Wealth Management solution. If you want to modify or view these artifacts, you must copy the export file to the computer where IBM SPSS Collaboration and Deployment Services Deployment Manager is installed, and open the file.

About this task

Some streams, for example, Client Attrition, are dependent on R packages. Before running these streams, you must have R and R Essentials for Modeler installed. For SPSS Modeler 17.1, R 3.1.0 is available at <https://cran.r-project.org/bin/windows/base/old/3.1.0/>, and R Essentials for Modeler 17.1 is available at https://github.com/IBMPredictiveAnalytics/R_Essentials_Modeler/releases/tag/17.1.

In addition to the base R installation you will require the following libraries:

- survival
- plyr

You must open an R terminal and run the following installation commands:

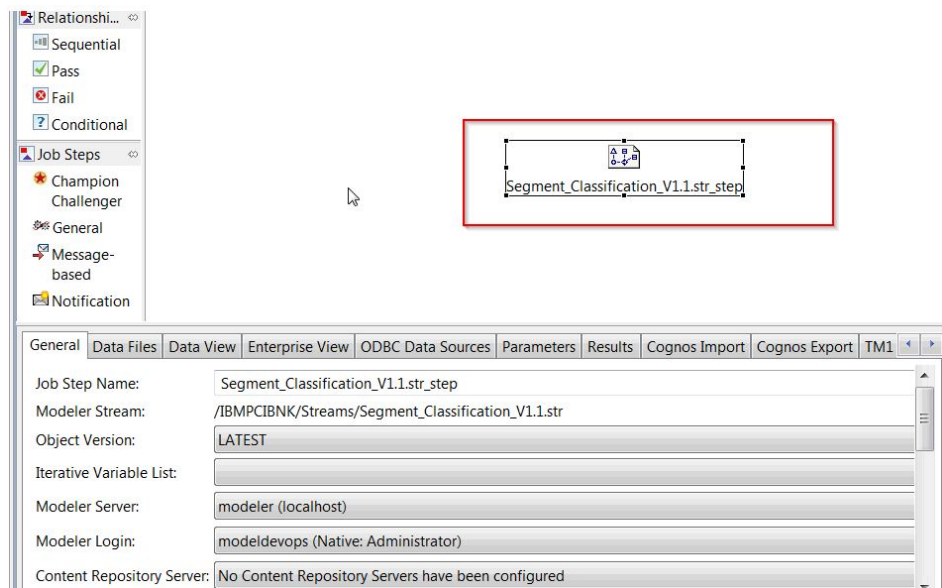
- `install.packages("plyr")`
- `install.packages("survival")`

Procedure

1. Copy the .pes file from the computer where you ran the Solution Installer to the computer where IBM SPSS Collaboration and Deployment Services Deployment Manager is installed.
The .pes file is available from the SolutionInstaller/NodeRoot/Downloads/IS_Wealth_ClientInsight_1.0.3/Analytics folder on the computer where you ran the Solution Installer.
2. In IBM SPSS Collaboration and Deployment Service Deployment Manager, right-click **Content Repository**, and click **Import**.
3. Browse to the .pes file
4. Select the following options:
 - Select **Resolve conflicts globally** , and the following options:
 - Select **Add new version of target item or rename source item**, and select **Source** for **Use labels from**.
 - For **Lock Resolution**, select **Continue import even if some objects cannot be imported due to locking conflicts**.
 - For **Resolve Invalid Version Conflicts**, select **Import**.

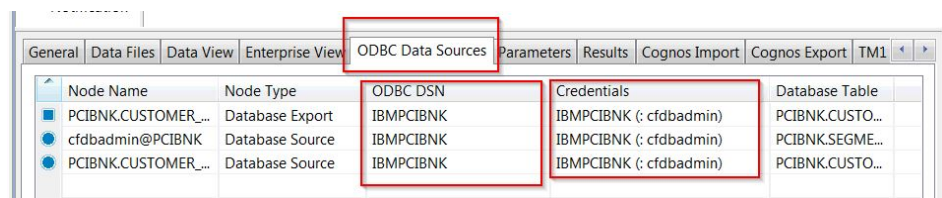
- For **Resource Definitions**, select **Recommended - Import** if there are no **Duplicate ID conflicts** or **Duplicate Name conflicts**.
5. Click **OK**.
 6. Under **Resource definitions / Credentials**, create a new credential named **IBMPCWEATH**.
 7. Under **Resource definitions / Data Sources**, create a new data source named **IBMPCWEATH**.
 8. After the .pes file is imported to the CnDS, open the job and click the step that is listed in the job.

Note: The following screen captures use a data source name for another industry solution. When referring to the screen captures, substitute **WEALTH** for the data source name **PCIBNK**.



Make sure that **Modeler Server** and **Modeler Login** fields are set to the correct definitions.

9. Click the **ODBC Data Sources** tab, and make sure that ODBC DSN and credentials are set to the newly created data source and credential.



Results

Content folders and resource definitions are added to the repository alongside any existing content.

Configuring the data view for IBM SPSS models

To configure the data view, IBM SPSS Modeler must be connected to the IBM Client Insight for Wealth Management database through an ODBC data source connection.

If your IBM Predictive Customer Intelligence environment uses the IBM SPSS Modeler client logged in to a Modeler server, complete the steps on the Predictive Analytics node computer (where IBM SPSS Modeler Server is installed).

If your IBM Predictive Customer Intelligence environment uses the IBM SPSS Modeler Client in a stand-alone environment, complete the steps on the client computer where IBM SPSS Modeler client is installed.

The IBM Client Insight for Wealth Management solution uses the Analytic Data View and JDBC source connections for accessing IBM Analytical Decision Manager. When the IBM Client Insight for Wealth Management files are imported through IBM SPSS Collaboration and Deployment Services Deployment Manager, a new version of the Enterprise View is created that contains the tables for the solution.

Procedure

1. Catalog the database on the client computer.
 - a. Click **Start > IBM DB2 > DB2COPY1 (Default) > DB2 Command Window - Administrator**.
 - b. Enter the following command to catalog the database node:
`db2 catalog tcpip node NODE_NAME remote data_node_name server PORT_NUMBER`
NODE_NAME can be any value. *PORT_NUMBER* is 50000 by default.
 - c. Enter the following command to catalog the PCI database:
`db2 catalog database WEALTH at node NODE_NAME authentication server`
You must use the same *node_name* that you used in the **db2 catalog database** command.
2. Create an ODBC DSN to point to the IBM Client Insight for Wealth Management database. The database account that is provided in the ODBC connection must be the same user that was used for creating the tables.
3. In the Deployment Manager client, under **Resource Definitions, Credentials**, open the **db2admin** credentials and update the user ID and password to the DB2® administrator account of the data node computer.

Configuring ODBC for IBM SPSS Modeler Server on Linux

To use an ODBC data source with IBM SPSS Modeler Server on a Linux operating system, you must configure the environment.

Procedure

1. Stop the IBM SPSS Modeler Server.
2. Go to the /root/SDAP711 directory.
The driver files are installed as part of the IBM Client Insight for Wealth Management Server deployment.
3. Run the setodbcpath.sh script to update the ODBC path in the scripts.
4. Edit the odbc.sh script to add the definition for ODBCINI to the end of the script. For example:
`ODBCINI=/usr/spss/odbc/odbc.ini; export ODBCINI`

ODBCINI must point to the full file path of the odbc.ini file for IBM SPSS Modeler. The odbc.ini file lists the ODBC data sources that you want to connect to. A default odbc.ini file is installed with the drivers.

5. In the odbc.ini file, add the data source and specify the driver in the [ODBC Data Sources] section of the file.

For example, add the data source as:

```
[ODBC Data Sources]WEALTH=IBM DB2 ODBC Driver
```

6. In the odbc.ini file, create an ODBC data source connection for the WEALTH database.

For example, include the following content:

```
[WEALTH]
Driver=/opt/ibm/db2/V10.5/lib64/libdb2o.so
DriverUnicodeType=1
Description=IBM DB2 ODBC Driver
ApplicationUsingThreads=1
AuthenticationMethod=0
BulkBinaryThreshold=32
BulkCharacterThreshold=-1
BulkLoadBatchSize=1024
CharsetFor65535=0
#Database applies to DB2 UDB only
Database=WEALTH
DefaultIsolationLevel=1
DynamicSections=200
EnableBulkLoad=0
EncryptionMethod=0
FailoverGranularity=0
FailoverMode=0
FailoverPreconnect=0
GrantAuthid=PUBLIC
GrantExecute=1
GSSClient=native
HostNameInCertificate=
IpAddress=IP_Address_of_DB_server
KeyPassword=
KeyStore=
KeyStorePassword=
LoadBalanceTimeout=0
LoadBalancing=0
LogonID=db2inst1
MaxPoolSize=100
MinPoolSize=0
Password=password
PackageCollection=NULLID
PackageNamePrefix=DD
PackageOwner=
Pooling=0
ProgramID=
QueryTimeout=0
ReportCodePageConversionErrors=0
TcpPort=50000
TrustStore=
TrustStorePassword=
UseCurrentSchema=0
ValidateServerCertificate=1
WithHold=1
XMLDescribeType=-10
```

Important: You must use the driver library libdb2o.so with IBM SPSS Modeler.

Ensure that you set DriverUnicodeType=1 to avoid buffer overflow errors when you connect to the database.

7. If you are using the 64-bit version of IBM SPSS Modeler Server, define and export LD_LIBRARY_PATH_64 in the odbc.sh script:

```
if [ "$LD_LIBRARY_PATH_64" = "" ]; then
LD_LIBRARY_PATH_64=<library_path>
else
LD_LIBRARY_PATH_64=<library_path>:$LD_LIBRARY_PATH_64
fi
export LD_LIBRARY_PATH_64
```

Where <library_path> is the same as for the LD_LIBRARY_PATH definition in the script that was initialized with the installation path. For example, /usr/spss/odbc/lib.

Tip: You can copy the if and export statements for LD_LIBRARY_PATH in the odbc.sh file, append them to the end of the file. Then, replace the LD_LIBRARY_PATH strings in the newly appended if and export statements with LD_LIBRARY_PATH_64. Here is an example of the odbc.sh file for a 64-bit IBM SPSS Modeler Server installation:

```
if [ "$LD_LIBRARY_PATH" = "" ]; then
  LD_LIBRARY_PATH=/usr/spss/odbc/lib
else
  LD_LIBRARY_PATH=/usr/spss/odbc/lib:$LD_LIBRARY_PATH
fi
export LD_LIBRARY_PATH
if [ "$LD_LIBRARY_PATH_64" = "" ]; then
  LD_LIBRARY_PATH_64=/usr/spss/odbc/lib
else
  LD_LIBRARY_PATH_64=/usr/spss/odbc/lib:$LD_LIBRARY_PATH_64
fi
export LD_LIBRARY_PATH_64
ODBCINI=/usr/spss/odbc/odbc.ini; export ODBCINI
```

Ensure that you export LD_LIBRARY_PATH_64, and define it with the if loop.

8. Configure IBM SPSS Modeler Server to use the driver. Edit modelersrv.sh and add the following line immediately after the line that defines SCLEMDNAME:

```
. <odbc.sh_path>
```

Where odbc.sh_path is the full path to the odbc.sh file.

For example: . /usr/spss/odbc/odbc.sh

Ensure that you leave a space between the first period and the file path.

9. Save modelersrv.sh.
10. Configure the IBM SPSS Modeler Server to use the ODBC wrapper named libspssodbc_datadirect.so.

- a. Go to the /usr/IBM/SPSS/ModelerServer/16.0/bin directory.

- b. Remove the existing libspssodbc.so soft link by using the following command:

```
rm-fr libspssodbc.so
```

- c. Link the new wrapper to libspssodbc.so by using the following command:

```
ln-s libspssodbc_datadirect_utf16.so libspssodbc.so
```

11. Configure the db2cli.ini file in <db2_instance_home>/sqlllib/cfg/db2cli.ini to add the sections for each database.

```
[WEALTH]
Database=WEALTH
Protocol=TCPIP
DriverUnicodeType=1
```

```
Port=50000
Hostname=ip or hostname
UID=username
PWD=password
```

12. Save the `odbc.ini` file.

What to do next

To test the connection, do the following steps:

1. Restart IBM SPSS Modeler Server.
2. Connect to IBM SPSS Modeler Server from a client.
3. Add a database source node to the canvas.
4. Open the node and verify that you can see the data source names that you defined in the `odbc.ini` file.

For more information and troubleshooting tips for connecting to data sources, see the SPSS Modeler documentation (www.ibm.com/support/knowledgecenter/SS3RA7_16.0.0)

Deploying the IBM Cognos content

For IBM Cognos® Analytics, you must create a data source connection, and then deploy the content files for the IBM Client Insight for Wealth Management solution.

Preparing the IBM Cognos content

You must move the IBM Cube Designer content for the IBM Client Insight for Wealth Management solution to the Cognos Deployment folder.

Procedure

1. Copy the IBM Cube Designer file from the computer where you deployed the solution to the computer where you installed IBM Cognos Framework Manager, and decompress the file.
The file is named `\BI\Client_ClientInsight_CD.fmd`.
2. Download IBM Cognos Analytics Cube Designer software from Passport Advantage®. Cube Designer requires Framework manager to be installed on the same node as well.
3. Go to the location where the installation files were downloaded and extracted and then double-click the `issetup.exe` file.
4. Select the language to use for the installation. The language that you select determines the language of the user interface. All supported languages are installed. You can change the user interface to any of the installed languages after installation.
5. On the Installation Location panel, select the location where Framework Manager is installed.
6. Accept the defaults on the Component Selection page.
7. Follow the directions in the installation wizard to copy the required files to your computer.
If you are installing in a directory that contains other Cognos Analytics components, you are prompted to create backup copies of the files that will be replaced.
8. In the Finish page of the installation wizard, complete the following steps:

- a. If you want to see the log files, click **View** for the appropriate log file.
- b. If you want to see late-breaking information about the product, select the check box for IBM Cognos Release Notes®.
- c. Click **Finish**.

Creating a data source connection to the database

You must create a data source connection to the IBM Client Insight for Wealth Management database.

Procedure

1. Open a web browser.
2. Go to the IBM Cognos Analytics portal URL.
For example, go to `http://cognos_node_name:9300/bi`.
3. On the **Welcome** page, click **Manage > Administration console**.
4. Click the **Configuration** tab, and click **Data Source Connections**.
5. Click **New Data Source**.
6. In the **Name** box, type **WEALTH**, and then click **Next**.
7. In the connection page, select **IBM DB2**, ensure that **Configure JDBC connection** is selected, and click **Next**.
8. In the **DB2 database name** field, type **WEALTH**.
9. Leave **DB2 connect string** blank.
10. Under **Signons**, select both **Password** and **Create a signon that the Everyone group can use**, and then type the user ID and password for the DB2 instance owner user that you used to create the database, and click **Next**.

Tip: To test whether the parameters are correct, click **Test the connection**. After you test the connection, click **OK** to return to the connection page.

11. In the **Server name** box, enter the name or IP address of your data node computer.
12. In the **Port number** box, enter the DB2 port number. The default is 50000.
13. In **Database name**, type **WEALTH**.

Tip: To test whether the parameters are correct, click **Test the connection**. After you test the connection, click **OK** to return to the connection page.

14. Click **Finish**.

Deploying dynamic cubes for the sample data

If you choose to use the sample data for the IBM Client Insight for Wealth Management solution, you must deploy the dynamic cubes.

Before you begin

You must create a data source connection to the database that contains the data by completing the steps in the following link:

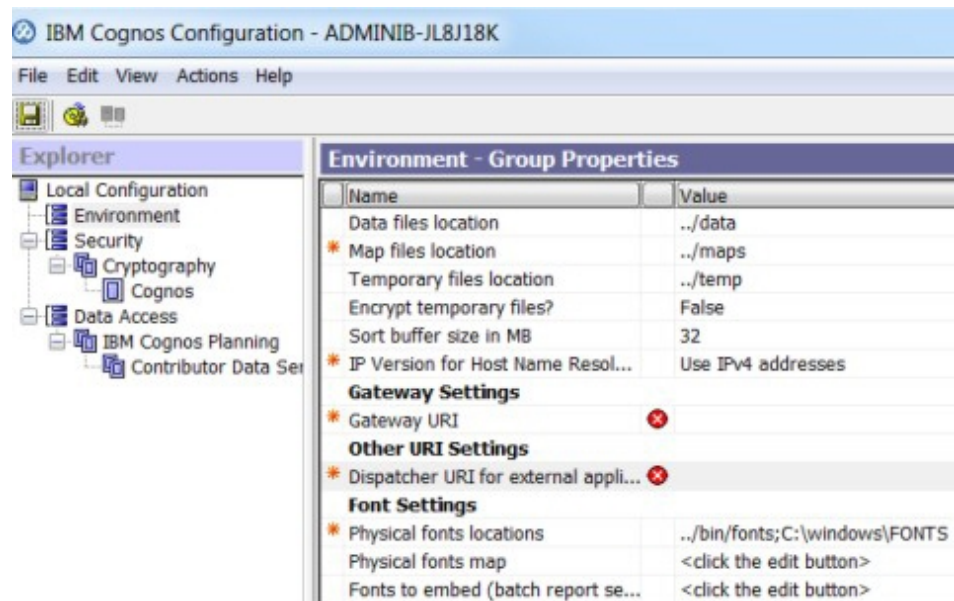
Creating a data source in the Cognos Administration portal (http://www.ibm.com/support/knowledgecenter/SSEPGG_10.5.0/com.ibm.dwe.migrate.doc/data_source_cs_cognos.html)

Procedure

1. Add the dispatcher and gateway information of the computer in which the data source is created to the Cognos configuration of the local system from which cubes are published (the computer on which the cube designer is installed).

Use the following URI to set the dispatcher and the gateway:

- Gateway URI: `http://cognos_node_name:9300/bi/v1/disp`
- Dispatcher URI: `http://cognos_node_name:9300/p2pd/servlet/dispatch`



2. Open IBM Cognos Cube Designer and click **Open Existing** to load the .fmd file.
3. In Cognos Cube Designer, click the data source to display the Properties window.
4. Change the Content Manager data source to the name of the data source connection that is created in Cognos Server
5. Change the schema name to the name under which data objects are created.
6. Right-click the data source and refresh the metadata.
7. To publish the cubes, right-click a package and click **Publish**. If a message indicates that the package contains warnings, you can ignore the message.
8. Click **OK**.
Cubes are published to the Cognos Analytics server. A message appears to indicate that the cubes are published successfully.
9. Check the status of the cube in Cognos Administration under **Data Sources**. Initially all cubes have a status of **Unknown**.
10. Select all the cubes that you published, right-click next to the cube, select **Add data store to server group**, and click **OK**. Now the cubes move to an **Unavailable** status.
11. From the same menu, click **Start**. If an error message is encountered when you publish the cube, check the log file in `C:\Program Files\IBM\cognos\analytics\logs\XQE` on the computer in which Cognos Analytics is installed. Open the most recent log file with a file name that starts with `xqe1og` followed by a date and time stamp. The error message in the log looks similar to the following message:

```
<event component="XQE" group="MDXEngine" level="ERROR" thread="272"
timestamp="2015-06-19 10:21:16.719" contextId="10892"
requestId="wvq2MqyClyMC2G4dyv19MdMjyywsGjhhqs4j4q8q"
rolapCube="LIFE_EVENT_HISTORY_FACT"
sessionId="9380_891386e6-16a7-11e5-8029-fb9fdf7b972d">
<![CDATA[XQE-D8-0006 Unable to logon to the data source.
```

Deploying the IBM Cognos reports

You must deploy the IBM Client Insight for Wealth Management reports by using the IBM Cognos Administration console.

Procedure

1. Open a web browser.
2. Go to the IBM Cognos Analytics portal URL.
3. On the **Welcome** page, click **Manage > Administration console**.
4. On the **Configuration** tab, click **Content Administration**.
5. On the toolbar, click the **New Import** button.
6. In the **Deployment Archive** pane, select the deployment archive, and click **Next**.
The deployment archive is named `Wealth_CustomerInsight_BIContent.zip`.
7. In the **Specify a name and description** pane, accept the default or enter a new name, and click **Next**.
8. In the **Select the public folders and directory content** pane, select all of the packages in the table, leave the **Options** as default, and click **Next**.

Note: Ensure that the **Disable after import** option is cleared.

9. In the **Specify the general options** pane, accept the defaults, and click **Next**.
10. On the **Review the summary** page, click **Next**.
11. On the **Select an action** page, select **Save and run once**, and click **Finish**.
12. On the **Run with options** page, accept the defaults, and click **Run**, and then click **OK**.
13. Select **View the details of this import after closing this dialog** and click **OK**.
The IBM Client Insight for Wealth Management content is available in the **Team Content** area.
14. Rave libraries are also available as part of the solution. They are packaged in the `Wealth_CustomerInsight_Rave.zip` file.
15. In the Administration console, on the **Library** tab, click the **Import Visualizations** button.
16. Select the `Wealth_CustomerInsight_Rave.zip` file, and click **Import**.

Installing the EAR file

The EAR file contains the REST APIs that you use to embed the IBM Client Insight for Wealth Management solution in your existing system.

Procedure

1. Log in to the WebSphere Application Server Network Deployment administrative console.

2. Load the IS_Wealth_WebPortalEAR.ear file into one of the WebSphere Application Server nodes, either the Cognos Analytics node or the Analytics node.
3. Install the application through WebSphere Application Server.
4. Click the **Applications** link, and then click **Install New Application**.
5. From the Specify the EAR, WAR, JAR, or SAR module to upload and install page, select **Local file system**, and then browse to the location on your system of the EAR file.
6. Start the installed application, IS_Wealth.

Adding the default PCI Cognos port number to the web portal

After you deploy the web portal on your server, users will be able to access Cognos reports that are installed on the same computer.

About this task

Initially, the web portal is pointing to Cognos reports on port 80 by default. But IBM Predictive Customer Insight installs Cognos on port 81 by default. So you must complete the following procedure for the HTML files (except login.html) that are in the web portal's server folder on the server where you deployed the portal.

Note: For Websphere Application Server, the web portal's server folder will be similar to: `<server_installation_directory>\profiles\AppSrv01\installedApps\ADMINIB-TJGMVIINode01Cell\IS_<industry>_WebPortalEAR.ear\IS_<industry>_WebPortal.war`

Procedure

1. In a text editor, open the HTML file or files.
2. Locate the following piece of code:

```
function loadIframe()
{
var host_name = window.location.hostname;
document.getElementById("iframeElement").setAttrib
}
</script>
```
3. Add + ":81" to the code, as shown below:

```
function loadIframe()
{
var host_name = window.location.hostname + ":81";
document.getElementById("iframeElement").setAttrib
}
</script>
```
4. Save the HTML file or files.

Results

You are now able to access the Cognos reports from the web portal.

Downloading the solution content to a client computer

After you have the solution installer running, you can download the solution content files to any client computer.

The solution installer deploys the content files to the server computers that are running Red Hat Enterprise Linux operating systems where you have the server components running. You can also download the solution content to computers that are running Microsoft Windows operating systems. For example, to load the Collaboration and Deployment Services content on your client computer, you can download the pes file.

Before you begin

The solution installer must be running before you can download the solution content files.

Procedure

1. In a web browser, enter the following URLs to download the content deployment instructions:
`https://solution_installer_hostname:8080/Downloads/
IS_Wealth_ClientInsight_1.0.3/
IS_Wealth_ClientInsight_1.0.3_ClientDeploymentFiles.txt`
2. Enter the following URLs to download the content:
 - To download the web application content, enter
`https://solution_installer_hostname:8080/Downloads/
IS_Wealth_ClientInsight_1.0.3/Web/Wealth_ClientInsight_Web.zip`
 - To download the SPSS content, enter
`https://solution_installer_hostname:8080/Downloads/
IS_Wealth_ClientInsight_1.0.3/Analytics/Wealth_ClientInsight_str.zip`
 - To download the Collaboration and Deployment Services content, enter
`https://solution_installer_hostname:8080/Downloads/
IS_Wealth_ClientInsight_1.0.3/Analytics/Wealth_ClientInsight_CDS.pes`

Product license files

After you install the IBM Client Insight for Wealth Management solution, you must ensure that the appropriate swidtag file and license directory exists on each computer on which you installed a component.

Copying the component license files to each component computer

The swidtag file and license directory must exist on each server node computer and each computer on which you install a component of the IBM Client Insight for Wealth Management solution.

swidtag files are provided for both production and non-production use of the solution. You must copy the appropriate swidtag file for your usage.

Note: Do not rename the directory or files

If you installed on a Red Hat Enterprise Linux operating system by using the solution installer, the license files are automatically copied to each server node computer.

Procedure

1. On the computer where you decompressed the artifact files, go to the iso-swid or iso-swid_NonProduction directory, and decompress the file, if applicable.

2. Copy the swidtag file to each computer on which you installed a IBM Client Insight for Wealth Management component.

For example, on Microsoft Windows operating systems, copy the file so that you have a C:\IBM\BBCI_Wealth_1_0_4\iso-swid directory that contains a swidtag file. On Linux operating systems, you would have an /opt/IBM/BBCI_Wealth_1_0_4/iso-swid directory that contains a swidtag file.

3. From the directory where you decompressed the artifact files, decompress the license.zip file, and then copy the license directory to each computer where you installed a component of the solution.

For example, On Microsoft Windows operating systems, copy the directory and contents so that you have a C:\IBM\BBCI_Wealth_1_0_4\license directory that contains the license files. On Linux operating systems, you would have an /opt/IBM/BBCI_Wealth_1_0_4/license directory that contains the license files.

Results

The following folders must exist on each computer on which you installed a component of the solution:

- On Microsoft Windows operating systems (both server and client components):
 - C:\IBM\BBCI_Wealth_1_0_4\license (containing the product license files)
 - C:\IBM\BBCI_Wealth_1_0_4\iso-swid (containing the product swidtag file)
- On Linux operating systems where a server component is installed:
 - /opt/IBM/BBCI_Wealth_1_0_4/license (containing the product license files)
 - /opt/IBM/BBCI_Wealth_1_0_4/iso-swid (containing the product swidtag file)

Updating your software tag file if you change product usage

If you change your usage of the IBM Client Insight for Wealth Management solution, such as to a non-production environment from a production environment, you must switch the software tags for your installation.

You must copy the appropriate software tag file to each computer on which a server or client component is installed.

Procedure

1. On the computer where you decompressed the artifact files, go to the iso-swid or iso-swid_NonProduction directory, and decompress the file, if applicable.
2. Copy the swidtag file to each computer on which you installed a component and replace the existing file.

For example, on Microsoft Windows operating systems, copy the file so that you have a C:\IBM\BBCI_Wealth_1_0_4\iso-swid directory that contains a swidtag file. On Linux operating systems, you would have an /opt/IBM/BBCI_Wealth_1_0_4/iso-swid directory that contains a swidtag file.

Appendix A. Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products.

For information about the commitment that IBM has to accessibility, see the IBM Accessibility Center (www.ibm.com/able).

IBM Cognos HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

Report output

In IBM Cognos Administration, you can enable system-wide settings to create accessible report output. For more information, see the *IBM Cognos Analytics Administration and Security Guide*. In IBM Cognos Report Studio, you can enable settings to create accessible output for individual reports. For more information, see the *IBM Cognos Report Studio User Guide*. You can access the previously mentioned documents at IBM Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

Appendix B. Troubleshooting

This section contains troubleshooting information for the IBM Client Insight for Wealth Management installation.

Troubleshooting a problem

Troubleshooting is a systematic approach to solving a problem. The goal of troubleshooting is to determine why something does not work as expected and how to resolve the problem.

Review the following table to help you or customer support resolve a problem.

Table 2. Troubleshooting actions and descriptions

Actions	Description
A product fix might be available to resolve your problem.	Apply all known fix packs, or service levels, or program temporary fixes (PTF).
Look up error messages by selecting the product from the IBM Support Portal, and then typing the error message code into the Search support box (http://www.ibm.com/support/entry/portal/).	Error messages give important information to help you identify the component that is causing the problem.
Reproduce the problem to ensure that it is not just a simple error.	If samples are available with the product, you might try to reproduce the problem by using the sample data.
Ensure that the installation successfully finished.	The installation location must contain the appropriate file structure and the file permissions. For example, if the product requires write access to log files, ensure that the directory has the correct permission.
Review all relevant documentation, including release notes, technotes, and proven practices documentation.	Search the IBM Knowledge Center to determine whether your problem is known, has a workaround, or if it is already resolved and documented.
Review recent changes in your computing environment.	Sometimes installing new software might cause compatibility issues.

If the items in the table did not guide you to a resolution, you might need to collect diagnostic data. This data is necessary for an IBM technical-support representative to effectively troubleshoot and assist you in resolving the problem.

Troubleshooting resources

Troubleshooting resources are sources of information that can help you resolve a problem that you are having with an IBM product.

Support Portal

The IBM Support Portal is a unified, centralized view of all technical support tools and information for all IBM systems, software, and services.

The IBM Support Portal lets you access all the IBM support resources from one place. You can tailor the pages to focus on the information and resources that you need for problem prevention and faster problem resolution. Familiarize yourself with the IBM Support Portal by viewing the demo videos (https://www.ibm.com/blogs/SPNA/entry/the_ibm_support_portal_videos).

Find the content that you need by selecting your products from the IBM Support Portal (<http://www.ibm.com/support/entry/portal>).

Before contacting IBM Support, you will need to collect diagnostic data (system information, symptoms, log files, traces, and so on) that is required to resolve a problem. Gathering this information will help to familiarize you with the troubleshooting process and save you time.

Service request

Service requests are also known as Problem Management Reports (PMRs). Several methods exist to submit diagnostic information to IBM Software Technical Support.

To open a PMR or to exchange information with technical support, view the IBM Software Support Exchanging information with Technical Support page (<http://www.ibm.com/software/support/exchangeinfo.html>).

Fix Central

Fix Central provides fixes and updates for your system's software, hardware, and operating system.

Use the pull-down menu to navigate to your product fixes on Fix Central (<http://www.ibm.com/systems/support/fixes/en/fixcentral/help/getstarted.html>). You may also want to view Fix Central help.

IBM developerWorks®

IBM developerWorks provides verified technical information in specific technology environments.

As a troubleshooting resource, developerWorks provides easy access to the most popular practices, in addition to videos and other information: developerWorks (<http://www.ibm.com/developerworks>).

IBM Redbooks®

IBM Redbooks are developed and published by the IBM International Technical Support Organization, the ITSO.

IBM Redbooks (<http://www.redbooks.ibm.com>) provide in-depth guidance about such topics as installation and configuration and solution implementation.

Software support and RSS feeds

IBM Software Support RSS feeds are a quick, easy, and lightweight format for monitoring new content added to websites.

After you download an RSS reader or browser plug-in, you can subscribe to IBM product feeds at IBM Software Support RSS feeds (<https://www.ibm.com/software/support/rss>).

Log files

Log files can help you troubleshoot problems by recording the activities that take place when you work with a product.

Error messages

The first indication of a problem is often an error message. Error messages contain information that can be helpful in determining the cause of a problem.

After the Solution Installer is run, Chef processes are still running after the cleanup.sh script is executed

After the cleanup.sh script is run on the Solution Installer node, all Chef processes should be terminated. However, in some cases Chef processes are still running.

If you try to run the Solution Installer setup.sh file again, you might receive a message that required ports are in use, or creation of the Chef user might fail.

The solution to this issue is to reboot the installation node after you run the "cleanup.sh" script.

Note: This information applies only to the Solution Installer node and not the client/target nodes.

Attention: The Solution Installer runs on the latest versions of Chrome and Firefox. It is not tested on Safari and does not run on Internet Explorer.

Appendix C. Client data ingestion: SPSS streams

The IBM Client Insight for Wealth Management solution works with IBM Predictive Customer Intelligence.

Two SPSS streams are provided that enable the client to ingest data into the solution database. The client data in a predefined Comma Separated Value (CSV) file format is provided to the stream as input, and the stream extracts the data from the CSV file and inserts the records into relevant tables in the solution database. The client data can be of the following types:

- Customer demographic details (including contact information)
- Customer transactions data

There are two separate streams for each of the types of data.

Purpose of the SPSS streams

The SPSS streams act as an important ETL process between the client data and the solution database.

They perform the following operations:

- Extract raw client data from the CSV files
- Transform data according to the solution needs (such as eliminating the unwanted spaces)
- Filter the transformed data and load it into relevant tables in the solution database

By using the streams, clients can easily ingest large sets of data related to customers and their transactions.

The following two streams are provided:

- Wealth Customer ETL – Customer demographic details (including contact information)
- Wealth Transaction ETL - Customer transactions data

CSV formats

This section provides the CSV formats for both customers and transactions.

Important: In the following CSV files, you must replace the NULL values by default values for the streams to work correctly.

Format for the CSV file input to the Wealth Customer ETL

"CITY","COUNTRY","EMAIL","POSTCODE_AREA","STATE","STREET","FULL_TELEPHONE_NUMBER",
"BIRTH_DATE","FULL_NAME","PHOTO","MARITAL_STATUS","EDUCATION"

CITY > city where the customer lives

COUNTRY > country where the customer lives

EMAIL > customer's email address

POSTCODE_AREA > postal code of the area where the customer lives

STATE > state where the customer lives

STREET > street address where the customer lives

FULL_TELEPHONE_NUMBER > customer's telephone number

BIRTH_DATE > customer's date of birth
FULL_NAME > customer's full name
PHOTO > Link to the customer's photo (URL)
MARITAL_STATUS > customer's marital status
EDUCATION > customer's most recently completed education

Sample CSV file for customers

```
"CITY","COUNTRY","EMAIL","POSTCODE_AREA","STATE","STREET",  
"FULL_TELEPHONE_NUMBER","BIRTH_DATE","FULL_NAME","PHOTO","MARITAL_STATUS","EDUCATION"  
"Jamaica","US","vereen@yahoo.com","04017","MA","11 smith street","8572055850", "1986-06-17",  
"Alfonso Osborne","http://hostname/ibmcognos/samples/images/Customer/3.png","Married","Graduate"
```

Format for the CSV file input to the Wealth Transaction ETL

```
"CALENDAR_DATE","NAME","FULL_NAME","BIRTH_DATE","PHOTO",  
"MARITAL_STATUS","EDUCATION","DESCRIPTION","NAME","NET_CASH_FLOW_AMOUNT"
```

Notice that in the format, there are two instances of "NAME".

The first instance of "NAME" relates to the channel name.

The second instance of "NAME" relates to the transaction type name. In the stream this is referred to as NAME(1).

CALENDAR_DATE > date of the transaction
NET_CASH_FLOW_AMOUNT > transaction amount
BIRTH_DATE > customer's date of birth
FULL_NAME > customer's full name
PHOTO > Link to the customer's photo(URL)
MARITAL_STATUS > customer's marital status
EDUCATION > customer's most recently completed education.
DESCRIPTION > relates to geographic area description

Sample CSV file (transactions)

In the following sample there are three transactions related to the customer provided in the customer's csv file.

```
"CALENDAR_DATE","NAME","FULL_NAME","BIRTH_DATE","PHOTO",  
"MARITAL_STATUS","EDUCATION","DESCRIPTION","NAME","NET_CASH_FLOW_AMOUNT"  
"1980-04-07","In Person","Alfonso Osborne","1986-06-17",  
"http://hostname/ibmcognos/samples/images/Customer/3.png",  
"Married","Graduate","Remote","Credits","90937.90674"  
"1985-12-07","In Person","Alfonso Osborne","1986-06-17",  
"http://hostname/ibmcognos/samples/images/Customer/3.png",  
"Married","Graduate","Remote","Credits","124841.22253"  
"1985-12-07","In Person","Alfonso Osborne","1986-06-17",  
"http://hostname/ibmcognos/samples/images/Customer/3.png",  
"Married","Graduate","Remote","Money Market","-4815.30429"
```

Prerequisites for the ETL streams

There are no prerequisites for the Wealth Customer ETL stream. However, there are prerequisites for the Wealth Transaction ETL stream.

The following prerequisites are required for the Wealth Transaction ETL to work:

- The Wealth Customer ETL stream must be run first to load the customer details into the INDIVIDUAL_CUSTOMER_DIMENSION table. This is because the Wealth Transaction ETL stream uses this table to establish relationship between the customer and his transactions.

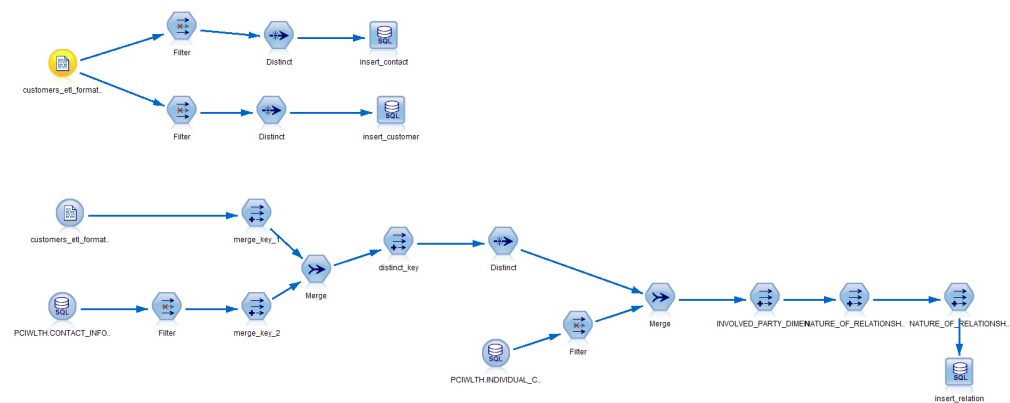
- Each customer is identified by a distinct key: (FULL_NAME, BIRTH_DATE, PHOTO, MARITAL_STATUS, EDUCATION). A combination of all these values would uniquely identify a customer. Using this key as a reference, only transactions related to the customers that are loaded through the Wealth Customer ETL stream must be provided in the CSV input file for the Wealth Transaction ETL stream.
- The CALENDAR_DATE provided in the CSV input file must be present in the CALENDAR_DATE_DIMENSION table of the Wealth solution database.
- The channel name (NAME) provided in the CSV input file must be present in the CHANNEL_DIMENSION table of the Wealth solution database.
- The transaction type name (NAME(1)) provided in the CSV input file must be present in the TRANSACTION_DIMENSION table of the Wealth solution database.
- The geographic area description (DESCRIPTION) provided in the CSV input file must be present in the GEOGRAPHIC_AREA_DIMENSION table of the Wealth solution database.

End result of using the ETL streams

This page illustrates the results of the ETL streams.

Wealth Customer ETL

The stream, shown in the following image, filters and loads the input data from the CSV file.



"BIRTH_DATE", "FULL_NAME", "PHOTO", "MARITAL_STATUS", "EDUCATION" are inserted into the INDIVIDUAL_CUSTOMER_DIMENSION table. The combination of all these columns forms a distinct key that identifies a particular customer.

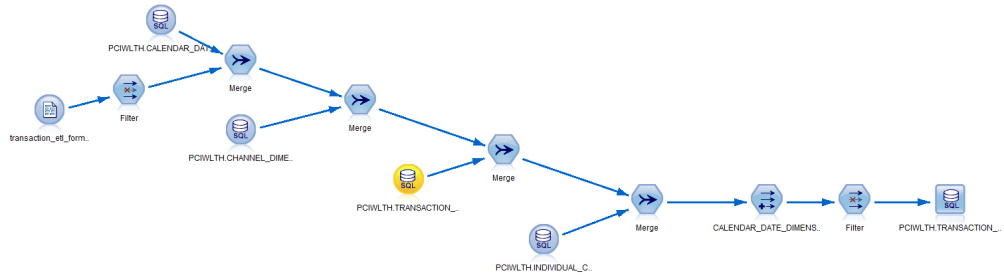
"CITY", "COUNTRY", "EMAIL", "POSTCODE_AREA", "STATE", "STREET", "FULL_TELEPHONE_NUMBER" are inserted into the CONTACT_INFORMATION_DIMENSION table. The combination of all these columns forms a distinct key that identifies a particular contact.

After that, the stream establishes a relationship between a customer and his contacts. This relationship information is stored in the INVOLVED_PARTY_CONTACT_INFORMATION_BRIDGE table.

In total, three tables (INDIVIDUAL_CUSTOMER_DIMENSION, CONTACT_INFORMATION_DIMENSION and INVOLVED_PARTY_CONTACT_INFORMATION_BRIDGE) are populated as a result of running this stream.

Wealth Transaction ETL

The stream, shown in the following image, filters and loads the input data from the CSV file.



The stream performs the following steps:

- Merges the data from the transactions csv file with the CALENDAR_DATE_DIMENSION table using the CALENDAR_DATE field and picks up the corresponding CALENDAR_DATE_DIMENSION_IDs.
- Merges the data from the transactions csv file with the CHANNEL_DIMENSION table using the NAME field and picks up the corresponding CHANNEL_DIMENSION_IDs.
- Merges the data from the transactions csv file with the TRANSACTION_DIMENSION table using the NAME field and picks up the corresponding TRANSACTION_DIMENSION_IDs.
- Merges the data from the transactions csv file with the INDIVIDUAL_CUSTOMER_DIMENSION table using the key: (FULL_NAME, BIRTH_DATE, PHOTO, MARITAL_STATUS, EDUCATION) and picks up the corresponding INDIVIDUAL_CUSTOMER_DIMENSION_IDs.
- Finally, it inserts the primary keys along with the corresponding NET_CASH_FLOW_AMOUNT field into the TRANSACTION_FACT table as a result of running this stream.

Appendix D. Generating SLMT logs for license self-compliance

SLMT stands for software license metric tagging. It generates a log file that indicates the number of customers in your database so that you can monitor your license compliance.

Procedure

1. From the Database folder, extract the `slmt.zip` file.

The following two files are in the `slmt` folder:

- `Wealth.jar`
- `Wealth.properties`

The `Wealth.jar` file contains the `slmt` source code to generate the xml files, and the `Wealth.properties` file provides the database details for the `Wealth.jar` file.

2. In the `Wealth.properties` file, modify the values for your environment.

The file contains the following information:

```
dbaddress={IP_Address/Hostname} // Contains the IP address/hostname of the database node
dbport={DB_Port} // Database port for DB2 on the above node
dbusername={DB_Username} // DB2 username
dbpassword={DB_Password} // DB2 port
dbname={WEALTH} // Database name
dbtablename={PCIWLTH.INDIVIDUAL_CUSTOMER_DIMENSION} // Table name
```

3. Set up a cron job to produce the tags daily.

Cron jobs are scheduler services that can be configured to run at a specific time.

For example, if the cron job is set to run at 11:59 PM daily, the `.jar` file runs at 11:59 and the SLMT log file records the number of customers. If customers are added to or removed from the database, it is reflected in the log file.

- a. Log in as root on the node where you want the tag files generated.
- b. Enter the following command: `crontab -e`
- c. Append the cron file with the following line

```
{Minute}{Hour}{Day_Of_Month}{Month}{Day_Of_Week} java -jar
{Full_path_to_.jar_file} {Full_path_to_.properties_file}
```

For example, to generate the xml files at 11:59 PM daily, use the following command:

```
59 23 * * * java -jar /root/Downloads/
slmt/Wealth.jar /root/Downloads/slmt/Wealth.properties
```

Results

Now you can determine the number of customers in the database by referring to the log file.

The xml files for `slm` tagging are generated in the `/opt/slm/*.slmtag` folder. Information is added until the log file reaches a certain size, and then a new log file is created.

The following code shows what the `slm` tag looks like:

```
<SchemaVersion>2.1.1</SchemaVersion>
<SoftwareIdentity>
  <PersistentId>b74be4a978bf4b66bd56271915f0ea5f</PersistentId>
```

```
    <Name>IBM Client Insight for Wealth Management</Name>
    <InstanceId>/opt/ibm</InstanceId>
  </SoftwareIdentity>
  <Metric logTime="2015-12-08T19:57:18-08:00">
    <Type>Metric.RESOURCE_VALUE_UNIT</Type>
    <SubType>CUSTOMERS</SubType>
    <Value>1000</Value>
    <Period>
      <StartTime>2015-12-07T19:57:17-08:00</StartTime>
      <EndTime>2015-12-08T19:57:17-08:00</EndTime>
    </Period>
  </Metric>
```


Appendix E. JDBC connection to WebSphere Application Server

The IBM Client Insight for Wealth Management solution provides a set of RESTful APIs to allow you to create applications to programmatically execute operations. If you're using Websphere Application Server as your database, you must set up a JDBC connection to the server. The provided instructions and procedures are based on WAS v8.5.5.

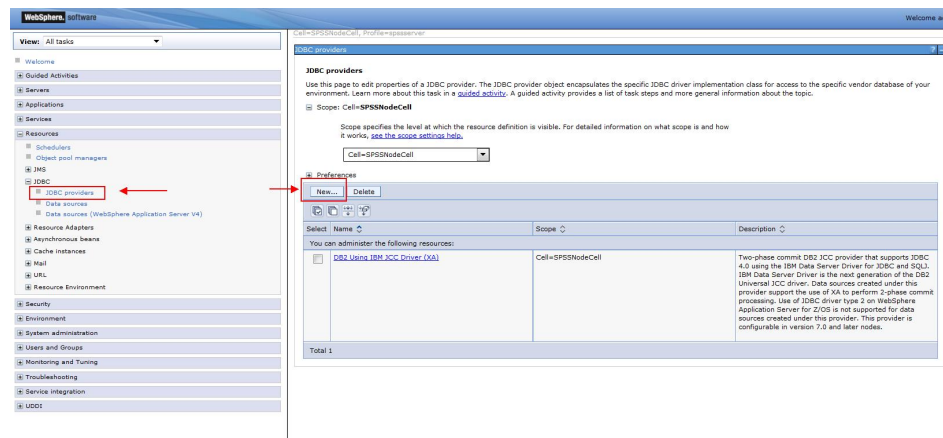
To set up your JDBC connection, you must complete the following tasks, in order:

1. "Configure the JDBC provider"
2. "Create an authentication alias" on page 52
3. "Configure the JDBC data source" on page 53

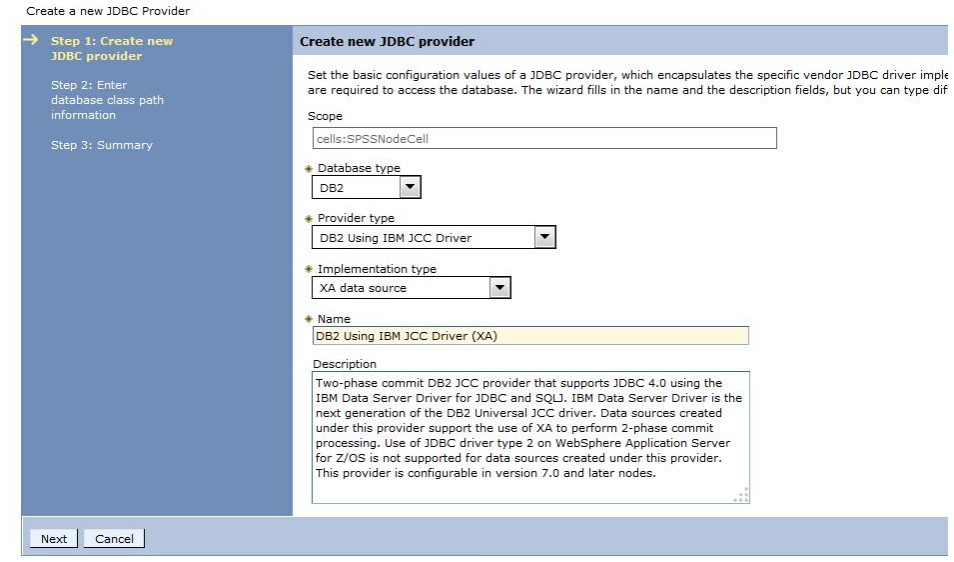
Configure the JDBC provider

In this section, you'll set up the DB2 using IBM J2CC Driver (XA) for your JDBC connection.

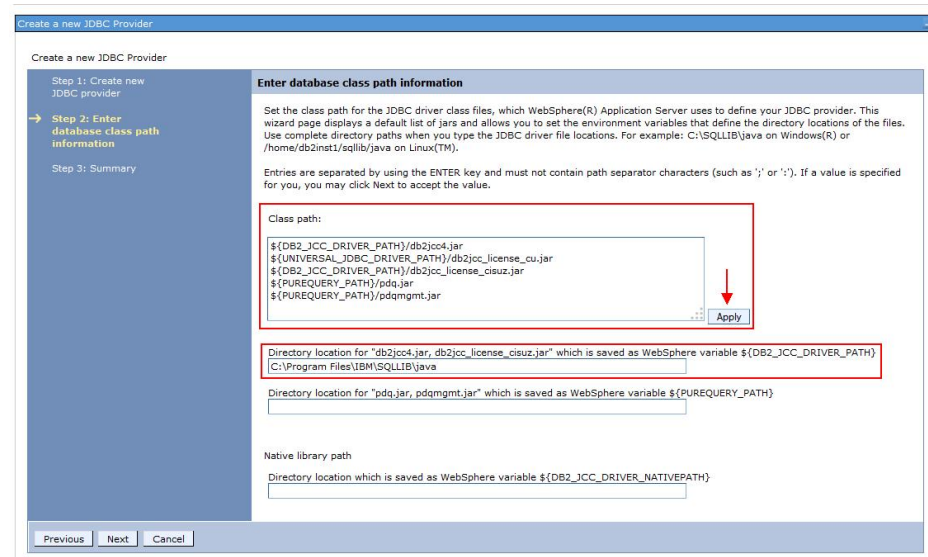
1. Log in to the WebSphere Application Server console.
2. Navigate to the JDBC providers section.



3. If you already have the *DB2 Using IBM J2CC Driver (XA)* setup, proceed to "Create an authentication alias" on page 52. Otherwise, create a new JDBC provider by clicking **New...**, as highlighted in the image.
4. Enter the JDBC provider details as per the following image, then click **Next**.



5. Use the default *Class path* settings, as shown in the following image, and click **Apply**.

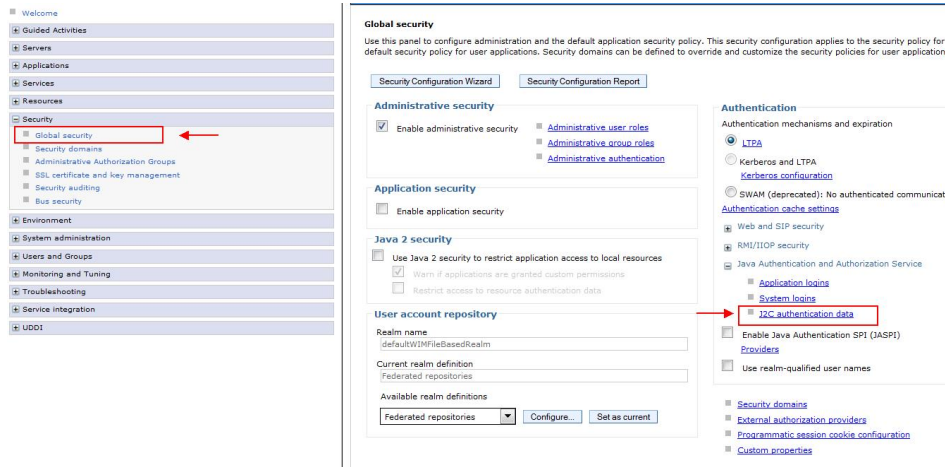


6. Specify the directory location where the db2jcc4.jar and db2jcc_license_cisuz.jar files are present on the server. The jar files are included in the WebSphere installation package.
7. Click **Next**.
8. Review the summary page and click **Finish**.

Create an authentication alias

In this section, you'll specify the authorized users (IDs and passwords) who have access to the database.

1. From the WAS console, go to the **Global Security** section and click **J2C authentication data**.

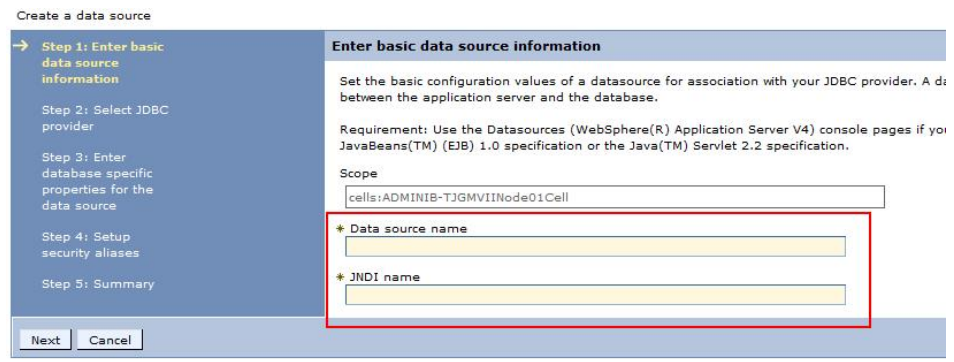


2. Click **New...**
3. In the next page, enter an arbitrary **Alias** name. Enter the User ID and Password that you use to connect to your database. The Description field is optional.
4. Click **Apply** and then **OK**.

Configure the JDBC data source

In this section, you'll configure your JDBC data source and test the connection.

1. From the WAS console, go to the **Data Sources** section and click **New...**
2. In the next page, enter an arbitrary **Data source name**.
3. Enter "jdbc/pciwlth" in the **JNDI name** field. The **JNDI name** is used by the REST API to connect to the database.



4. Click **Next**.
5. Choose **Select an existing JDBC provider**. Select the JDBC provider that you created in the first task. Click **Next**.
6. Provide the **Database name** that you wish to access. Provide the **Server name** that you wish to connect to and the **Port number**. The remaining details can retain their default settings. Click **Next**.

Create a data source

Step 1: Enter basic data source information

Step 2: Select JDBC provider

→ Step 3: Enter database specific properties for the data source

Step 4: Setup security aliases

Step 5: Summary

Enter database specific properties for the data source

Set these database-specific properties, which are required by the database vendor JDBC driver to support the connection through the datasources.

Name	Value
* Driver type	4
* Database name	
* Server name	
* Port number	50001

Use this data source in container managed persistence (CMP)

Previous Next Cancel

- Set the authentication alias that you created earlier, then click **Next**.

Create a data source

Step 1: Enter basic data source information

Step 2: Select JDBC provider

Step 3: Enter database specific properties for the data source

→ Step 4: Setup security aliases

Step 5: Summary

Setup security aliases

Select the authentication values for this resource.

Authentication alias for XA recovery
(none)

Component-managed authentication alias
(none)

Mapping-configuration alias
(none)

Container-managed authentication alias
(none)

Note: You can create a new J2C authentication alias by accessing one of the current wizard selections will be lost.

[Global J2C authentication alias](#)
[Security domains](#)

Previous Next Cancel

- Verify the summary information and click **Finish**.
- When you're prompted to save the server configuration changes, click **Save**.
- Select the JDBC data source that you have created and click **Test connection**. If successful, a message will appear indicating that a successful connection was established.

Appendix F. REST API reference

The IBM Client Insight for Wealth Management solution provides a set of RESTful APIs to allow you to create applications to programmatically invoke operations and extend industry solutions capabilities.

The representational state transfer (REST) API provides a lightweight interface that uses HTTP requests to communicate to the server. The APIs can be used to extract and aggregate data for further processing in other systems. All supported resources are listed in the following sections and are actionable using a GET operation.

IBM Client Insight for Wealth Management REST API reference documentation is accessible in a Swagger interface, which allows you to test supported operations directly from the API documentation. After deploying the EAR file (IS_Wealth_EAR) on a WebSphere Application Server, you can visit the following link to access the API documentation:

`http://<hostname>:<port>/iswealth-restapi`

The Swagger definition file can be accessed at: `/iswealth/utility/docs/json/get`

If a request returns an empty JSON response, this indicates that there were no records in the database that matched the parameters specified in the request. If an error occurred, one of the following error codes may be returned:

IS_WEALTH_ERR00

Unknown error

IS_WEALTH_ERR01

A customerid is required.

IS_WEALTH_ERR02

The specified customer_id parameter is invalid.

IS_WEALTH_ERR03

The specified pagestart parameter is invalid.

IS_WEALTH_ERR04

The specified pagesize is invalid.

IS_WEALTH_ERR05

Database error

IS_WEALTH_ERR06

A segment parameter is required.

IS_WEALTH_ERR07

A networth parameter is required.

The Behavioral Segmentation REST API allows you to create your own segments and associated segment definitions. This is a generic API that applies to IBM Customer Insight for Banking, IBM Client Insight for Wealth Management, and IBM Customer Insight for Insurance. The following error codes apply to the Behavioral Segmentation REST API.

IS_SEGMENTATION_ERR00

Unknown error

IS_SEGMENTATION_ERR01

Could not parse the JSON input. Please check the JSON input and try again.

IS_SEGMENTATION_ERR02

Failed to insert the segment into the database.

IS_SEGMENTATION_ERR03

Category does not exist in the data dictionary.

IS_SEGMENTATION_ERR06

Database error.

IS_SEGMENTATION_ERR15

No records found.

IS_SEGMENTATION_ERR16

Failed to create batch statements for insert.

IS_SEGMENTATION_ERR17

Failed to insert the segment definitions into the database.

IS_SEGMENTATION_ERR18

The industry parameter is required.

IS_SEGMENTATION_ERR19

The industry parameter is incorrect. Supported values are banking, wealth, or insurance.

IS_SEGMENTATION_ERR20

The segmented parameter is required.

Errors will include a “flag: false” indicator in the response body.

The URLs used to issue REST commands must adhere to the US-ASCII character set, including reserved and restricted characters. For example, a space must be URL-encoded as “%20”.

Note: For additional information on the Java API, please reference the provided Javadocs that are included in the installation package.

Customizing segments

The Behavioral Segmentation REST API allows you to create and delete custom segments and their associated segment definitions. The Segmentation Tool provides an interface for quickly editing or creating new segments.

For information on using the Segmentation Tool, see the topic Chapter 4, “Creating and managing customer segments,” on page 13.

Segment data dictionary

Segment definitions must conform to the behavioral categories defined in the segment data dictionary. All categories in the data dictionary are top-level and have a corresponding list of sub-categories. When creating a segment, you must provide conditions that define a segment at the sub-category level. The segment data dictionary for your industry solution is specified in the following table.

Table 3. Wealth data dictionary

Categories	Sub-categories
ASSETS	Bonds, Commodities, Credits, Derivatives, Estate Funds, Forex, Money Market, Stocks, Others
TRADING	Bonds, Commodities, Credits, Derivatives, Estate Funds, Forex, Money Market, Stocks, Others
FUNDING	Regular, Rare, Lumpy
INTERACTION	Rare, Frequent, Less Frequent

The categories are defined based on the customer transactions data.

ASSETS

Assets owned by the user in any of the listed sub-categories.

TRADING

Trading activity performed by the user in any of the listed sub-categories.

FUNDING

Funding pattern for the user.

INTERACTION

Interaction pattern for the user. Implies interaction with the wealth manager.

Segment definition

A segment definition is created by using any combination of these categories and the relevant sub-categories. As mentioned, conditions that define a segment are specified at the sub-category level. Some predefined segments are included in your industry solution. The REST API accepts the segment definition in the form of a JSON input string and persists it to the database. The JSON format for the segment definition is as follows:

```
{
  "segment": "segment_name",
  "categories": [
    {
      "name": "category_name",
      "subcategories": [
        {"name": "subcat_name", "operator": "value", "deviation": value}, ...
      ]
    }, ...
  ]
}
```

segment

This attribute is a string that holds the segment name.

categories

This is an array of categories.

Within the categories array for each category, you have:

name This attribute is a string that holds the category name.

subcategories

This is an array of subcategories.

Within the subcategories array for each subcategory, you have:

name This attribute is a string that holds the subcategory name.

operator

This attribute is a string that holds the operator value.

deviation

This is a float value that is used to specify “the number of times the standard deviation”.

The rules for **operator** values are determined by the following conditions.

- **greater**, if condition used is $> (M + deviation * SD)$.
- **upper**, if condition used is $> (M - deviation * SD)$.
- **lower**, if condition used is $< (M + deviation * SD)$.
- **less**, if condition used is $< (M - deviation * SD)$.
- **equal**, if condition used is $= \text{value}$.
- **greater num**, if condition used is $> \text{value}$.
- **less num**, if condition used is $< \text{value}$.
- **range**, if condition used is $> (M - deviation * SD) \text{ AND } (M + deviation * SD)$.

Note: Mean (M) and Standard Deviation (SD) values are calculated at the category level, for each category. These values are calculated by the Segmentation SPSS model using the customer transactions data. As a user, you supply the deviation value (i.e., the number of times the standard deviation).

The following example illustrates the segment definition structure.

Wealth segment name: Indifferent

The following sample JSON input defines these conditions:

- **ASSETS:** Bonds $> (M - 1.0 * SD)$; Stocks $< (M + 1.0 * SD)$. The operator value for Bonds is **upper**. The operator value for Stocks is **lower**.
- **TRADING:** Bonds $> (M + 0 * SD)$; Money Market $> (M - 0.5 * SD)$; Stocks $< (M + 0.5 * SD)$; and Others $< (M - 0.5 * SD)$. The operator value Bonds is **greater**. The operator value Money Market is **upper**. The operator value Stocks is **lower**. The operator value Others is **less**.
- **FUNDING:**
Funding pattern is **Not Lumpy** (i.e. Lumpy = 0). There would not be any Mean or Standard Deviation calculated in case of FUNDING category. The operator value is “equal” and deviation value set to 0.
Funding pattern is **Irregular** (i.e. Regular = 0). There would not be any Mean or Standard Deviation calculated in case of FUNDING category. The operator value is “equal” and deviation value set to 0.
- **INTERACTION:** Interaction pattern is “Rare” (i.e. Rare = 1). There would not be any Mean or Standard Deviation calculated in case of FUNDING category. The operator value is “equal” and deviation value set to 1.

```
{
  "segment": "Indifferent",
  "categories": [
    {
      "name": "ASSETS",
      "subcategories": [
        {"name": "Bonds", "operator": "upper", "deviation": 1},
        {"name": "Stocks", "operator": "lower", "deviation": 1}
      ]
    }
  ],
}
```



```

    {
      "name": "TRADING",
      "subcategories": [
        {"name": "Bonds", "operator": "greater", "deviation": 0},
        {"name": "Money Market", "operator": "upper", "deviation": 0.5},
        {"name": "Stocks", "operator": "lower", "deviation": 0.5},
        {"name": "Others", "operator": "less", "deviation": 0.5}
      ]
    },
    {
      "name": "FUNDING",
      "subcategories": [
        {"name": "Lumpy", "operator": "equal", "deviation": 0},
        {"name": "Regular", "operator": "equal", "deviation": 0}
      ]
    },
    {
      "name": "INTERACTION",
      "subcategories": [
        {"name": "rare", "operator": "equal", "deviation": 1}
      ]
    }
  ]
}

```

The Segmentation Framework REST APIs are part of the Framework Enterprise Application (IS_Framework_EAR). Once the EAR is deployed on a WebSphere Application Server, the interactive REST API documentation can be accessed from any browser at the following URL:

<http://<hostname>:<port>/isframework-restapi>

You can also create, edit, and delete custom segments using the browser interface that is available in the solution. Once the IS_Framework_EAR is deployed on a WebSphere Application Server, the interface can be accessed by navigating to the following URL:

<http://<hostname>:<port>/issegmentation-webportal>

Appendix G. Using the Watson Personal Insights API

You must set up the Watson Personal Insights API to use the Relationship Coach feature.

The Watson Personal Insights API is used to ingest unstructured text that is used to develop psychographic profiles of clients. It also provides insights that are tied to any upper quartile (>75%) or lower quartile value (<25%).

Procedure

1. Register for a Watson Personality Insight API key.

For more information, see <http://www.ibm.com/smarterplanet/us/en/ibmwatson/developercloud/personality-insights.html>

2. Add the credentials to the `bootstrap.properties` file.

- a. Go to the location where you deployed the `IS_Wealth_Solution_EAR.ear` file. This is in the `/opt/IBM/WebSphere/AppServer/profiles` directory where you installed the ear file on either the BI node or the Analytics node computer.

- b. In the `\IS_Wealth_REST\WebContent` directory, open the `bootstrap.properties` file in a text editor.

- c. Add the following content to the file:

```
#Watson Personality Insights
personality-insight.url=https://gateway.watsonplatform.net/personality-insights/api/v2/prof
personality-insight.username=<WatsonPersonalityInsightsAPI_username>
personality-insight.password=<WatsonPersonalityInsightsAPI_password>
```

The `personality-insight.url` is used for authenticating the Watson Personality Insights application.

The username and password are provided after you register for a Watson Personality Insights API key.

- d. Save and close the file.

3. Restart the WebSphere® Application Server profile.

Appendix H. Using the Alchemy API

You must set up the Alchemy API to use the Tailored News and Alerts model.

The Tailored News and Alerts model crawls data sources, such as news data, and provides summarized text outputs and their sentiments. For example, the model can be used to return news on a client's portfolio and stock information for the Portfolio Discussions module. For the Conversation Starters module, the Alchemy API returns news articles that might be of interest to the client.

Procedure

1. Register for an Alchemy API key.

For more information, see <http://www.alchemyapi.com>

2. Add the key to the `bootstrap.properties` file.

- a. Go to the location where you deployed the `IS_Wealth_Solution_EAR.ear` file. This is in the `/opt/IBM/WebSphere/AppServer/profiles` directory where you installed the ear file on either the BI node or the Analytics node computer.

- b. In the `\IS_Wealth_REST\WebContent` directory, open the `bootstrap.properties` file in a text editor.

- c. Add the following content to the file:

```
#AlchemyAPI key
key=<your_alchemy_key>
Alchemy_News_URL=<the_URL_on_which_alchemy_will_scout_for_news_articles>
Yahoo_Stock_API_URL=<the_URL_for_the_latest_stock_information>
```

The key value is assigned after you register for the Alchemy API key.

The Alchemy news URL is a custom field for scouting for news articles. The parameter allows you to include time periods, sources, and keywords to search for news articles.

The Yahoo stock URL is a custom field for the latest stock information, including prices and percentage changes.

For more information, see the following links:

- <http://www.ibm.com/smarterplanet/us/en/ibmwatson/developercloud/alchemy-data-news.html>
- <http://docs.alchemyapi.com/docs/introduction>

- d. Save and close the file.

3. Restart the WebSphere Application Server profile.

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