ORACLE
INSURANCE

Oracle Insurance

Data Capture Installation & Upgrade Guide

Release 4.4.5

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Oracle Insurance Data Capture Installation & Upgrade Guide

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CONTENTS

Preface vi
Audience vi
E-Delivery vi
RELATED DOCUMENTS vi

CHAPTER 1

Checklist of Requirements and Procedures 7

CHAPTER 2

Requirements 8
Server Requirements 8
Internet Information Services (IIS) 6.0 8
Message Queuing Services 10
MDAC 2.8 10
Microsoft .NET Framework 11
MSDTC 12
Insbridge Framework Administrator 15
Installing IBFA 15
Microsoft SQL Server 2005 21

CHAPTER 3

New Installation 22
Restore the OIDC Databases 23
OIDC Engine Installation 25
OIDC Palette Installation 30

CHAPTER 4

Server Configurations for OIDC 35
Settings for Compression 49

CHAPTER 5

Manually Updating Web.Config File 52

CHAPTER 6

Configuring OIDC 54

CHAPTER 7

Upgrade Installation 56

CHAPTER 8

Removing OIDC 63
Removing OIDC Databases 65

CHAPTER 9

Support 66
TTY Access to Oracle Support Services 66

INDEX

LIST OF FIGURES

FIGURE 1 ENABLING ACTIVE SERVER PAGES AND ASP.NET 9
FIGURE 2 MESSAGE QUEUING TYPE 10
FIGURE 3 INSTALLING .NET FRAMEWORK 11
FIGURE 4 CHECKING MSDTC 12
FIGURE 5 MY COMPUTER PROPERTIES 13
FIGURE 6 SECURITY CONFIGURATION 14
FIGURE 7 DTC CONSOLE MESSAGE 14
FIGURE 8 RESTART MESSAGE 15
FIGURE 9 INSTALLING INSBRIDGE 16
FIGURE 10 ENTERING THE DESTINATION FOLDER FOR INSBRIDGE 17
FIGURE 11 LOGON INFORMATION 18
FIGURE 12 SELECTING FEATURES FOR INSTALLATION 19
FIGURE 13 READY TO INSTALL 20
FIGURE 14 INSTALL README SCREEN 21
FIGURE 15 SETTING CLIENT DATABASE TO SQL SERVER 2005 (90) 23
FIGURE 16 WELCOME TO INSTALLING OIDC 25
FIGURE 17 SELECTING INSTALLATION PATH 26
FIGURE 18 READY TO INSTALL 26
FIGURE 19 ENGINE INSTALLATION PROGRESS 27
FIGURE 20 ENTERING DATABASE INFORMATION 28
FIGURE 21 COMPLETED ENGINE INSTALLATION 29
FIGURE 22 WELCOME TO INSTALLING OIDC 30
FIGURE 23 SELECTING THE DESTINATION FOLDER 31
FIGURE 24 READY TO INSTALL 32
FIGURE 25 ENGINE INSTALLATION PROGRESS 33
FIGURE 26 ENTERING DATABASE INFORMATION 33
FIGURE 27 COMPLETED PALETTE INSTALL 34
FIGURE 28 NAVIGATING TO APPLICATION POOL 35
FIGURE 29 CREATING A NEW APPLICATION POOL 36
FIGURE 30 SELECTING APPLICATION POOL PROPERTIES 36
FIGURE 31 SETTING PERFORMANCE OPTIONS 37
FIGURE 32 DELETING THE VIRTUAL DIRECTORY 38
FIGURE 33 CREATING NEW VIRTUAL DIRECTORY 39
FIGURE 34 VIRTUAL DIRECTORY WIZARD 40
FIGURE 35 CREATING A NEW APPLICATION POOL ALIAS 40
FIGURE 36 SELECTING THE DIRECTORY PATH 41
FIGURE 37 SETTING PERFORMANCE OPTIONS 41
FIGURE 38 FINISH CREATING DIRECTORY 42
FIGURE 39 SELECTING VIRTUAL DIRECTORY PROPERTIES 43
FIGURE 40 SELECTING THE OIDC APPLICATION POOL 44
FIGURE 41 SETTING THE DEFAULT CONTENT PAGE 45
FIGURE 42 VERIFYING ANONYMOUS ACCESS 46
FIGURE 43 SELECTING ASP.NET 4.0 47
FIGURE 44 ALLOWING ASP.NET 4.0 48
FIGURE 45 SELECTING PROPERTIES 49
FIGURE 46 OIDC HOME 54
FIGURE 47 OIDC ADMIN 55
FIGURE 48 DATABASE WELCOME 57
FIGURE 49 SELECTING AN INSTALLATION FOLDER 58

FIGURE 50 COMPLETED DATABASE INSTALLATION 60
FIGURE 51 DBUPDATER 61
FIGURE 52 REMOVING/REPAIRING OIDC 63
FIGURE 53 REMOVE COMPLETE 64

PREFACE

Welcome to the *Oracle Insurance Data Capture Installation and Upgrade Guide*. Oracle Insurance Data Capture (OIDC) is a Web-based software application that streamlines data capture by allowing insurers to create and configure questions and rules through an intelligent front-end data capture web application.

For release 4.4.5, component names have been updated. Designer is now Palette and Questionnaire is now Engine.

AUDIENCE

This guide is intended for system administrators, installers, database administrators and others tasked with installing and configuring the Oracle Insurance Data Capture (OIDC) system and associated databases.

E-DELIVERY

Oracle Insurance Data Capture is available as a download from the Oracle E-Delivery system. Downloaded files are zipped. Prior to installation, please make sure the source machine(s) where OIDC will be loaded has an unzip utility.

An unzip utility for most platforms is available on the E-Delivery download page.

Documentation from E-Delivery is in PDF format. Prior to installation, please make sure the source machine(s) where OIDC documentation will be loaded has a PDF reader.

Files are downloaded with part numbers as file names. Please make note of the part numbers you have downloaded and the corresponding file name. You may be asked to provide the part numbers or the filename if you contact Oracle Insurance Support.

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance web site:

  http://www.oracle.com/industries/insurance/index.html

- If you need assistance with an Oracle Insurance Data Capture, please log a Service Request using My Oracle Support at:

  https://support.oracle.com/.

Chapter 1

CHECKLIST OF REQUIREMENTS AND PROCEDURES

New Installation Checklist

The following checklist can be used to help in a **NEW** installation of OIDC.

- ❑ **Check Web Server for needed dependencies**
  - ❑ IIS Installed
  - ❑ MSMQ
  - ❑ MDAC 2.8
  - ❑ Microsoft .NET Framework version 4.0
  - ❑ MSDTC
  - ❑ IBFA Version 3.1.0 installed. Version 3.1.0 is found in Oracle Insurance Insbridge Rating and Underwriting Release 3.13.0. Please request this version from Oracle Support.

- ❑ **Check Database Server for needed requirements**
  - ❑ Proper Network Connection to Database Server
  - ❑ MS SQL Server 2005 SP2 with SQL Server Management Studio **OR** MS SQL Server 2005 Express with SQL Server Management Studio

- ❑ **Install OIDC Database**
  - ❑ Restore System database
  - ❑ Restore Client database
  - ❑ Restore Log database

- ❑ **Install Engine**
- ❑ **Install Palette**
- ❑ **Application Pool**
- ❑ **Virtual Directory Update**

- ❑ **Configure OIDC**
  - ❑ Change sysadmin password
  - ❑ Verify entries on Administration page

Update Checklist

The following checklist can be used to help with an **UPGRADE** of OIDC.

- ❑ **Upzip the DBUpdater.zip file and park DBUpdate folder**
- ❑ **Run the DBUpdaterInstall.msi**
- ❑ **Uninstall previous version – Questionnaire or Engine**
- ❑ **Run 4.4.5 Engine Setup.exe**
- ❑ **Uninstall previous version – Designer or Palette**
- ❑ **Run 4.4.5 Palette Setup.exe**

Chapter 2

REQUIREMENTS

SERVER REQUIREMENTS

A full installation of Windows Server 2003 is required. The following configuration assumes that the administrator of the server to be generally familiar with managing a Windows 2003 server.

Most Windows Server components are available for installation from the Control Panel, Add/Remove Programs applet by selecting Add/Remove Windows Components. In order to install these Windows Components, you may be required to have the Windows Installation files available. The following components are required:

- **IIS – Internet Information Services Version 6.0**
- **MSMQ – Microsoft Message Queuing Services**
- **MDAC 2.8**
- **Microsoft .NET Framework, version 4.0**
- **MSDTC**

Internet Information Services (IIS) 6.0

Oracle Insurance Data Capture (OIDC) is a web based application and requires IIS to be installed before the OIDC installation to facilitate the default web virtual directories creations.

The subcomponents of Application Server needed by OIDC are:

- Application Server Console
  - ASP.NET
  - Enable network COM+ access
  - Internet Information Services (IIS)
    - Common Files (default)
    - SMTP Service – Although not required, the SMTP service will allow OIDC to notify users via email when extended jobs have been completed. If the SMTP service is located on a corporate network, then the service must be properly configured for authorization to relay mail internally to a smart host. Please check with your information services support group for proper configuration.
    - World Wide Web Service
      - Active Server Pages
      - World Wide Web Service
- Message Queuing
- Active Directory Integration (default)
- Common (default)

After installing IIS, Active Server Pages, ASP.NET v4.0 must be enabled in order for OIDC to work.

1. Open Internet Information Services (IIS) Manager in the administration tools.

2. Select the Web Service Extensions on the left hand side and make sure they are **Allowed** as shown below:

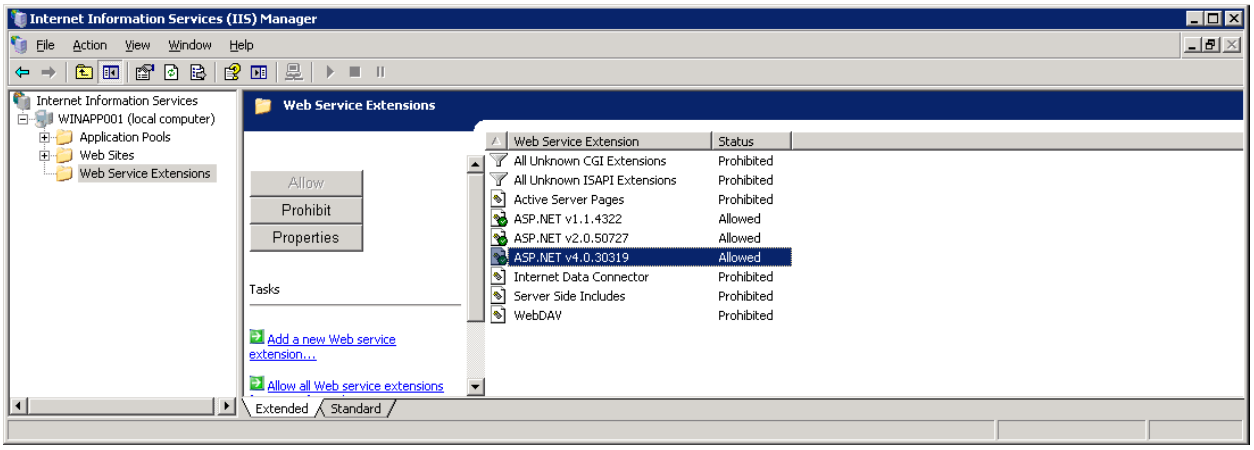


Figure 1 Enabling Active Server Pages and ASP.NET

Message Queuing Services

The Insbridge Rating and Underwriting system utilizes the Microsoft Message Queuing Service (MSMQ) for batching jobs and other types of extended functions. The Microsoft Messaging Queuing Service can be configured for stand-alone operation without needing to access any Active Directory unless specified by your information support services. OIDC utilizes by default private message queues that have no need for routing.

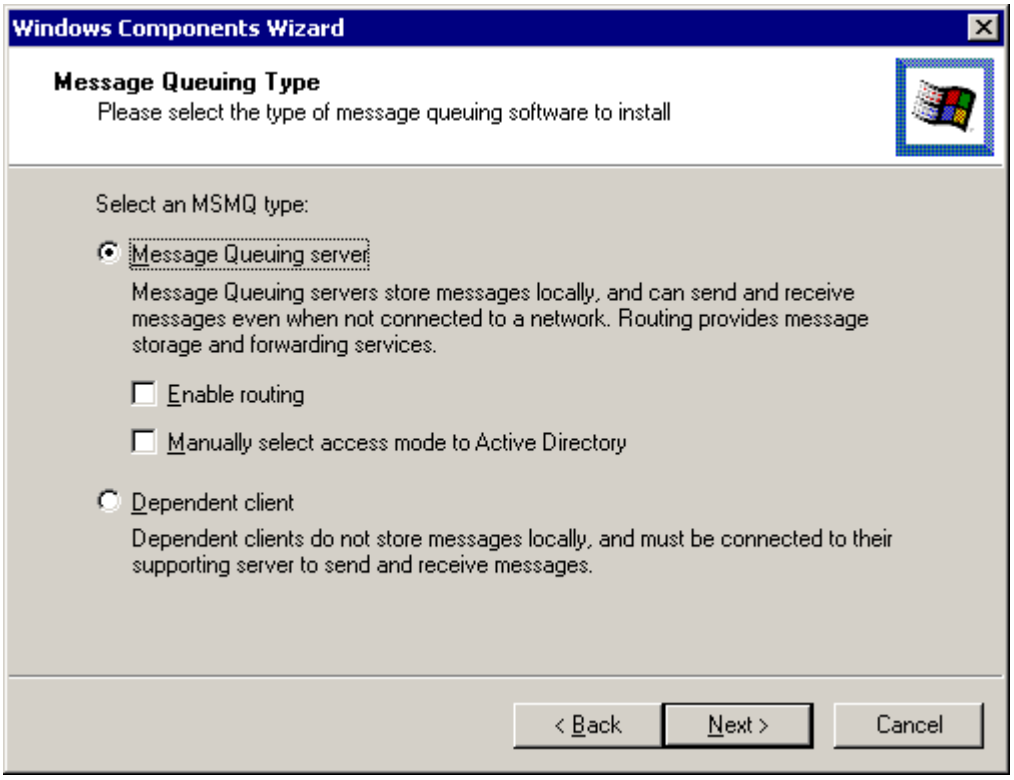


Figure 2 Message Queuing Type

MDAC 2.8

If OIDC is split between a web server and a database server, then Microsoft's Data access component version 2.8 needs to be installed on the web front-end server.

NOTE	MDAC version 2.8 is included with Windows Server 2003.

To check to see if MDAC is installed, go to: Start→Control Panel→Add or Remove Programs and scroll through the list. If it is not installed, you can download it from Microsoft's web site.

Microsoft .NET Framework

The installation application attempts to install all necessary dependencies that may be missing on the OIDC web host and will attempt to install the Microsoft .NET 4.0 Framework from the web. In some corporate environments, external access to download the Framework may not be allowed. Therefore, we would suggest installing the Microsoft .NET Framework version 4.0 prior to starting the OIDC install. This can be obtained from Microsoft's website or from using Microsoft's Windows Update.

We also highly recommend installing the .NET Framework after installing IIS in order to update all the web applications to utilize the ASPNET system. This can be doubled checked by opening Internet Service Manager and right clicking the Default Web Site, selecting properties, then select the Home Directory tab. Click the Configuration… button and scroll down.

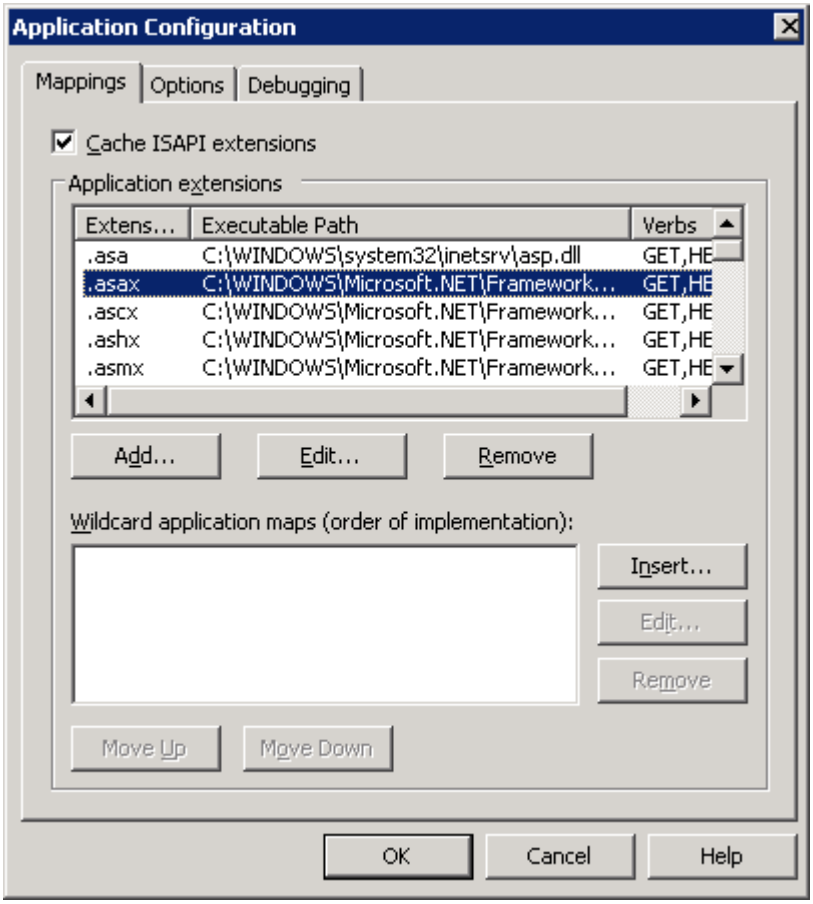


Figure 3 Installing .NET Framework

The ASPNET extensions (.asax, aspx, .asmx, etc.) need to point to %WINDIR%\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll.

MSDTC

Prior to installing OIDC, please check MSDTC availability.

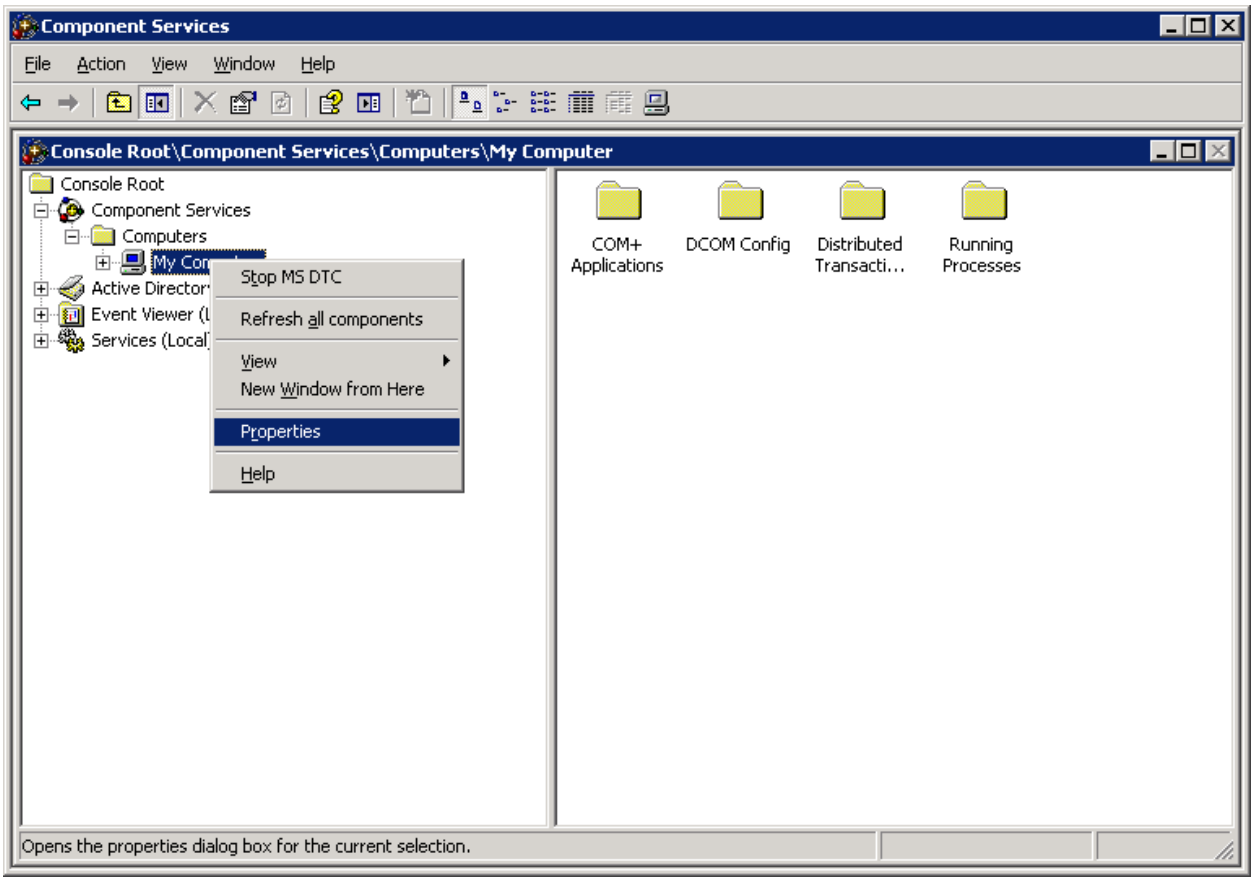


Figure 4 Checking MSDTC

1. Go to Control Panel → Administration Tools → Component Services.
2. Right click on My Computer → Properties.

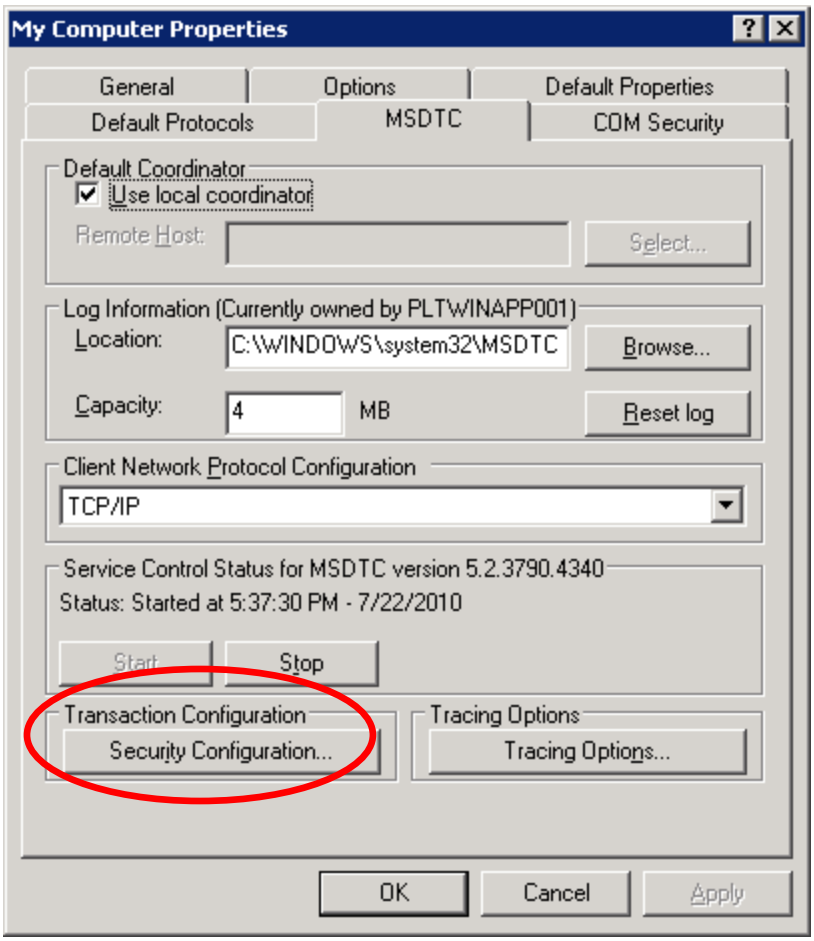


Figure 5 My Computer Properties

3. On the MSDTC tab, make sure of the following:

    a. **Use local coordinator** in Default Coordinator panel is checked.
    b. **Start button** in Service Control Status is accessed (the button is grayed out).

4. Click on **Security Configuration…** on Transaction Configuration panel.

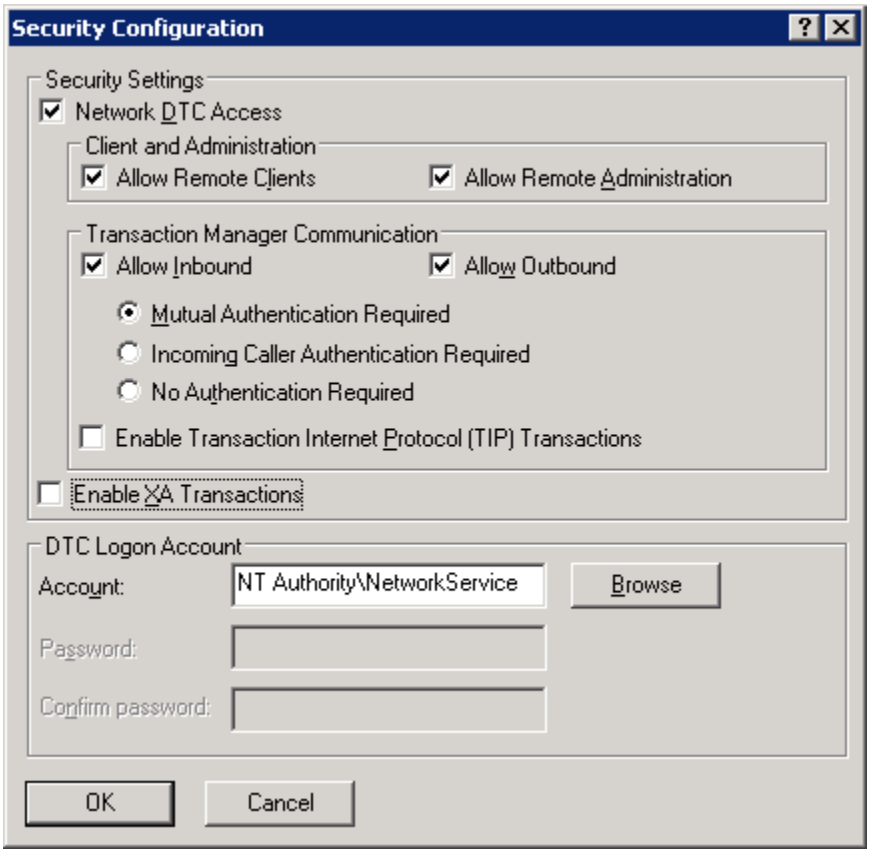


Figure 6 Security Configuration

5. On Security Configuration window, check:

    a. **Network DTC Access**.
    b. **Allow Remote Clients**.
    c. **Allow Remote Administration**.
    d. **Allow Inbound**.
    e. **Allow Outbound**.

Mutual Authentication Required is the recommended setting. However, in some environments the No Authentication option may be used.

6. Click **OK** to save. A DTC Console message will be displayed.

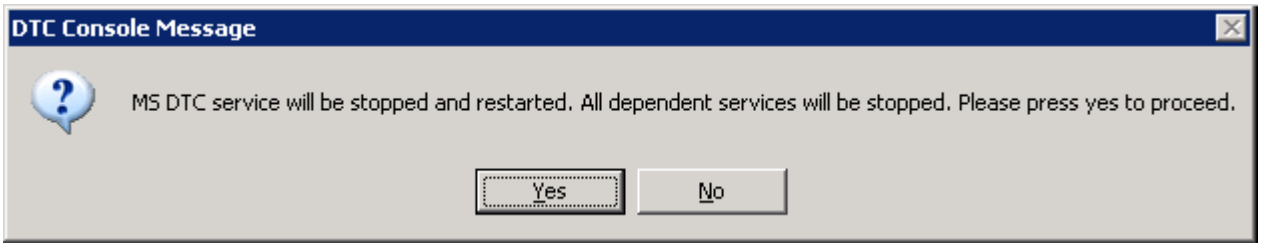


Figure 7 DTC Console Message

7. Click **Yes** on the DTC Console Message. A confirmation message will be displayed.

Figure 8 Restart Message

8. Click **OK** on DTC Console Message.

9. Click **OK** to save.

INSBRIDGE FRAMEWORK ADMINISTRATOR

The Insbridge Framework Administrator (IBFA) is an administrative tool that OIDC uses. OIDC requires that IBFA be installed on the same machine as Palette and Engine.

NOTE	An instance of Oracle Insurance Insbridge Rating and Underwriting Framework Administration (IBFA) Version 3.1.0 must be in place or installed prior to installing OIDC. IBFA Version 3.1.0 is found in Oracle Insurance Insbridge Rating and Underwriting Release 3.13.0.

NOTE	If you are planning on doing a complete installation of Insbridge Rating and Underwriting, please do the full installation found in the Insbridge Installation Guide. The IBFA installation in this guide is not be a complete installation of the Insbridge Rating and Underwriting System.

Installing IBFA

IBFA is in the Insbridge Rating and Underwriting (IBRU) System download, available from the Oracle E-Delivery system. Downloaded files are zipped. Prior to installation, please make sure the source machine(s) where IBRU will be loaded has an unzip utility.

You will only need the **Oracle Insurance - Insbridge Rating and Underwriting Install file**.

1. Open the **Oracle Insurance - Insbridge Rating and Underwriting Install file**.

NOTE	The installation program requires that the installer have administrator rights on the machine where the install is occurring.

NOTE	Please close all open applications before running the Oracle Insurance – Insbridge Rating and Underwriting file.

2. Open the Oracle Insurance – Insbridge Rating and Underwriting file. A Welcome screen will be displayed.

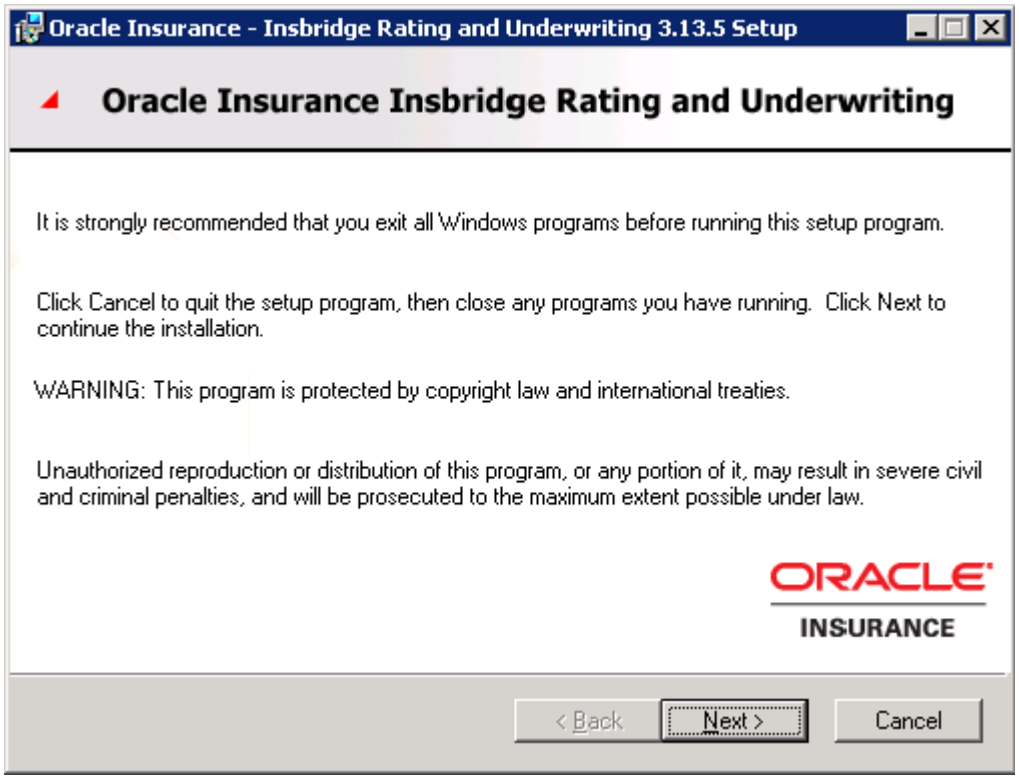


Figure 9 Installing Insbridge

3. Click **Next** to continue.

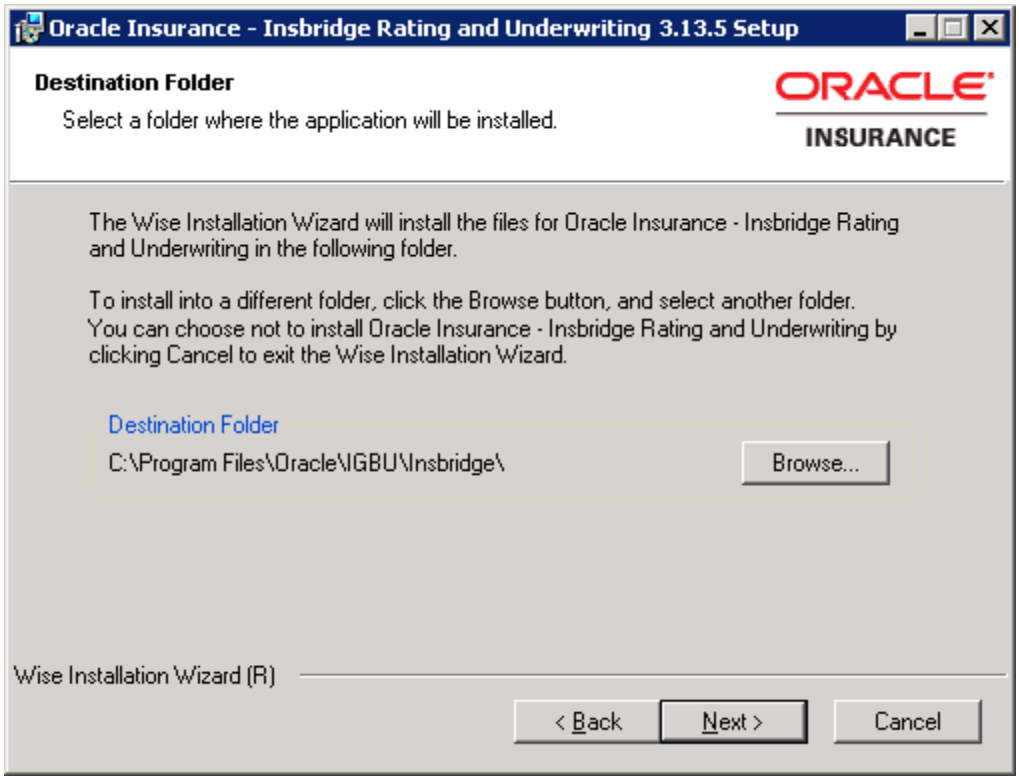


Figure 10 Entering the Destination Folder for Insbridge

4. Choose the location where the Insbridge installation will be located. This will be the location for all future installations for OIDC and Insbridge applications. Click **Next** to continue.

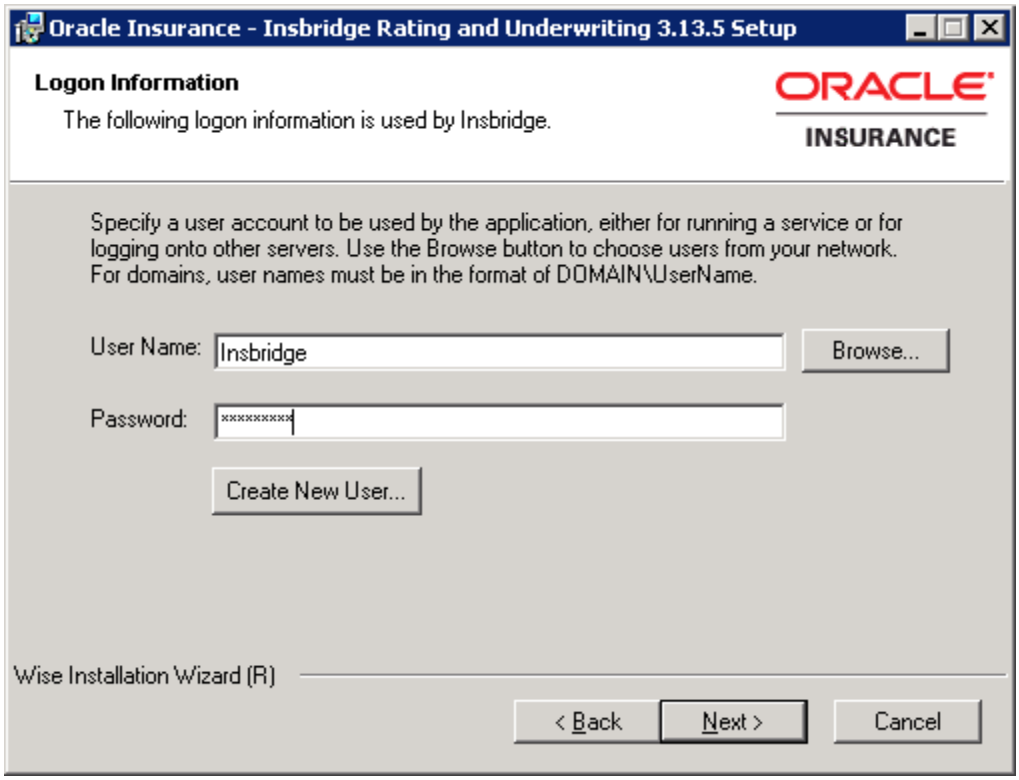


Figure 11 Logon Information

5. The logon information screen will be displayed. Enter a **User Name and Password** for a user with rights to the machine.

NOTE	You can use any user with admin rights to the machine or you can create a user specifically for this installation.

6. Click **Next** to continue.

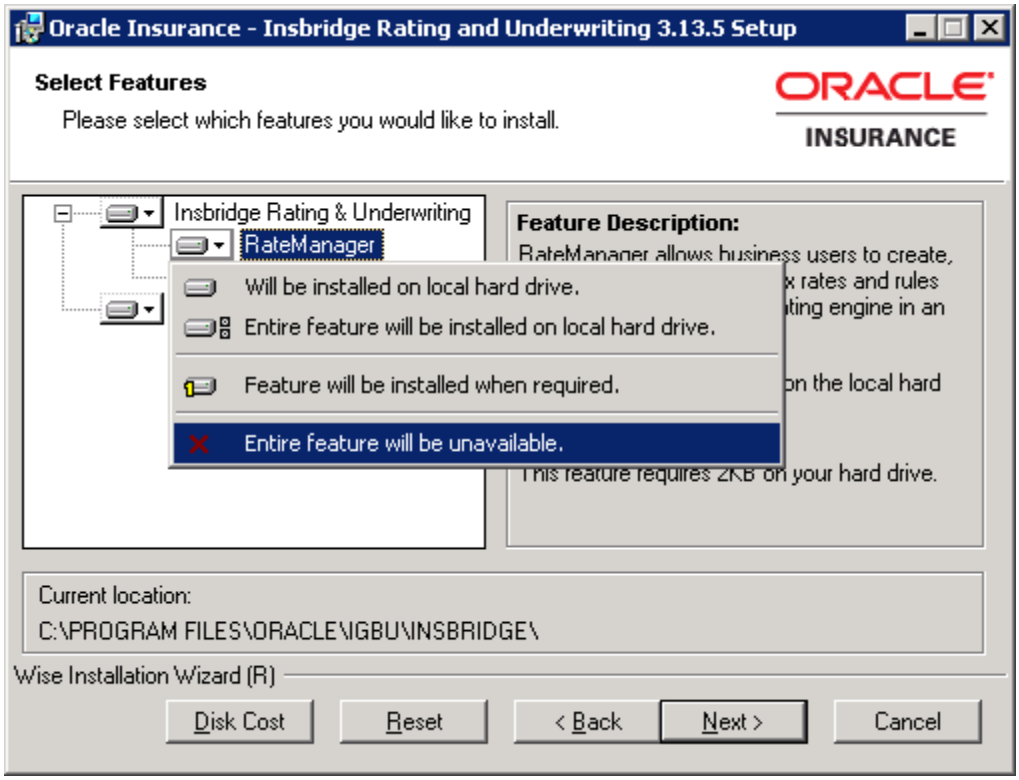


Figure 12 Selecting Features for Installation

7. The next screen will list the applications to be installed. To expand the options and view details, click on the downward arrow. All features are checked for installation. RateManager is the only one that you will be allowed to not install. Check **Entire feature will be unavailable**. Click **Next** to continue.

Options are:

- **Insbridge Rating and Underwriting**:
  - The default option is: Entire feature will be installed on local hard drive. This includes IBFA.
  - You will not be able to opt out of this selection.

- **RateManager**:
  - The default option is: Entire feature will be installed on local hard drive.
  - You will be able to opt out of this option. **Select Entire Feature will be unavailable.** RateManager will not be installed.

- **IBFA**:
  - The default option is: Entire feature will be installed on local hard drive.
  - You will not be able to opt out of this selection.

- **Oracle BI Publisher**:
  - The default option is: Entire feature will be installed on local hard drive.
  - You will not be able to opt out of this selection.
  - This option does **not** install the OBI Publisher. Only the templates required by the IBRU application will be installed on local hard drive.

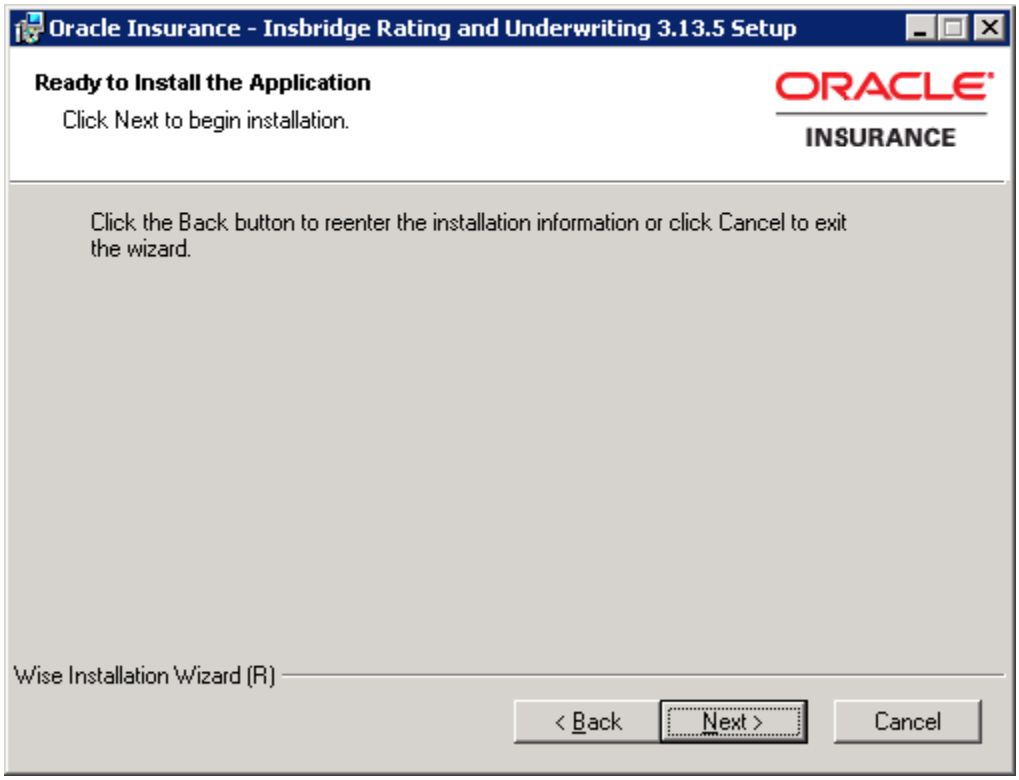
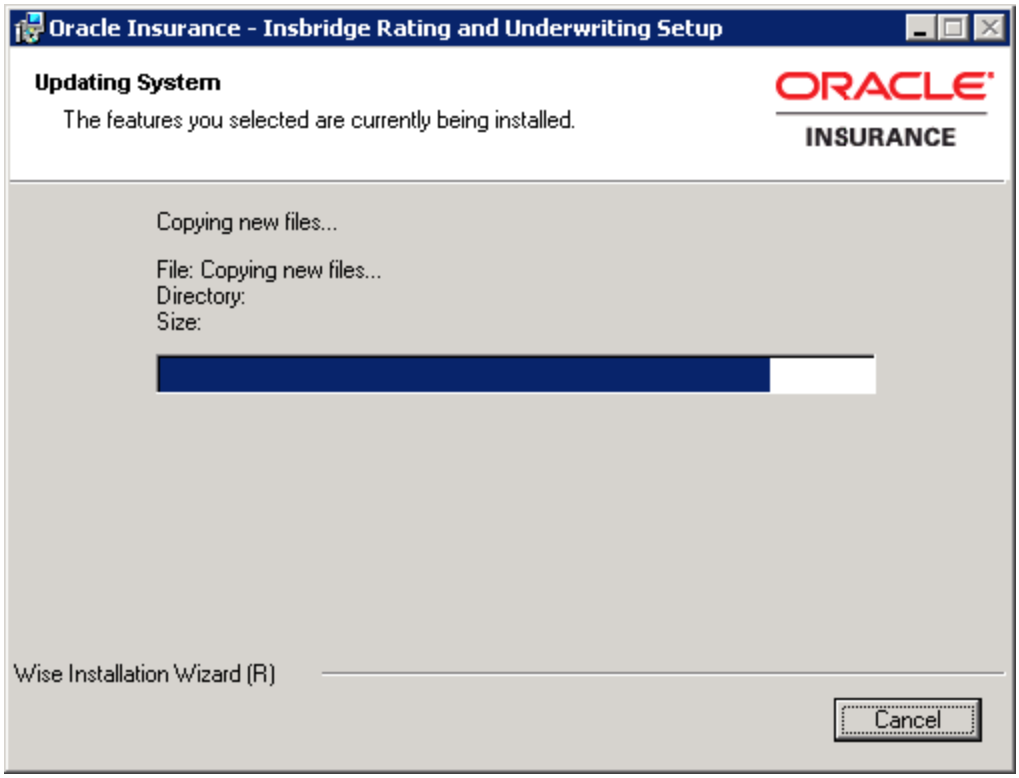


Figure 13 Ready to Install

8. A Ready to Install screen will be displayed. If you are ready, click **Next**. Otherwise click Back to check the options you want to install.



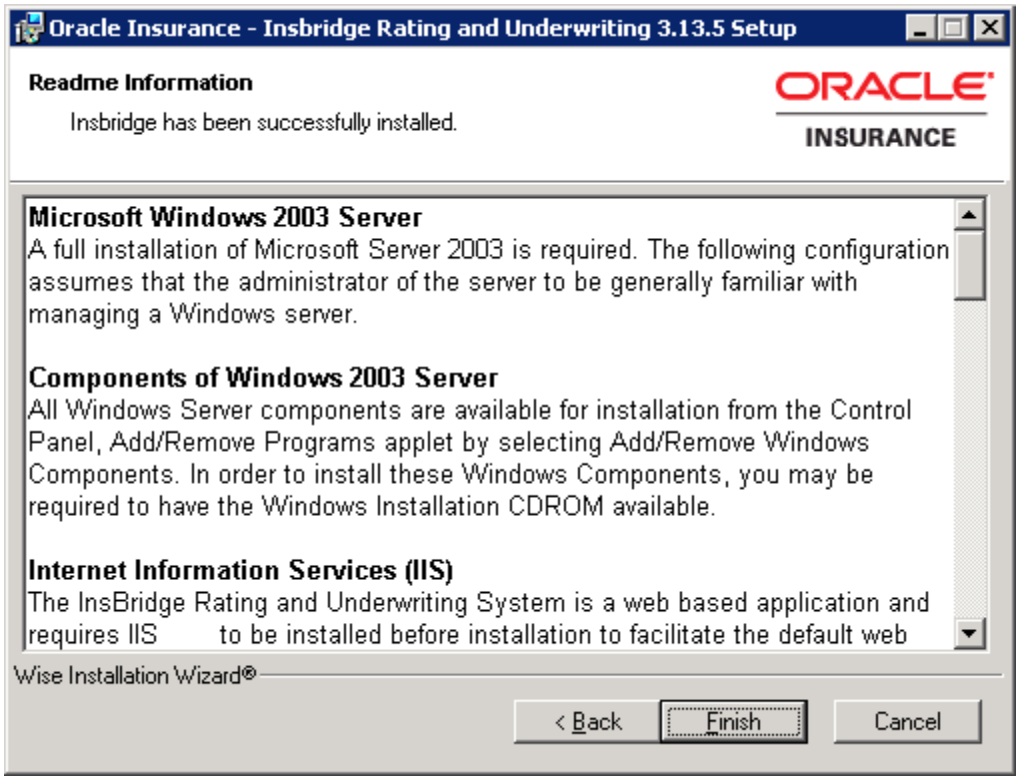


Figure 14 Install ReadMe Screen

9. Click **Finish** to finish the installation. The installation should complete successfully.

MICROSOFT SQL SERVER 2005

OIDC requires SQL Server 2005 SP3. Microsoft SQL Server can be installed on the same machine where OIDC resides, however for security and performance reasons, it is not recommended. If SQL Server resides on a separate host from the OIDC web front end, a properly configured network connection from the web server front end to SQL Server must exist. Testing can be performed by using the Data Sources application in Administrative Tools to make a default connection to the database server.

Depending on the load expected on the web server, the database can be placed on a separate SQL Server that can either be independent or shared as long as the following conditions are met.

NOTE	For SQL Server 2005, please make sure the SQL Server Client is installed.

- **Server Authentication** should be set to SQL Server and Windows Authentication mode.
- **Collation and Sort Order: Currently supported are the default SQL Server** collation and sort order plus case sensitivity using SQL_Latin1_General_CP1_CI_AS as the server collation. Check with Oracle Insurance for any questions regarding database server sort orders or collations.

Chapter 3

NEW INSTALLATION

The download from E-Delivery has four files:

- OIDC_4.4.5_Database – Holds the databases and updates for the application.
- OIDC_4.4.5_Palette – Installs the Palette portion of the application.
- OIDC_4.4.5_Engine – Installs the Engine portion of the application.
- OIDC_4.4_5_Documentation – Contains the Installation Guide and Release Notes for the application.

The download files you receive will be zip files.

- For a new install, you will need the OIDC_4.4.5_Database.zip. This file contains the blank databases that will need to be restored. Unzip the OIDC_4.4.5_Database.zip on the machine where the database will be installed.
- Unzip the Engine and Palette zip files on the machine where the application will be installed. These files will contain the executables that need to be run.
- Park the Engine file in a location you can access.
- Park the Palette file in a location you can access.
- Unzip the documentation file to a machine where you can easily access it.

The installation must be performed in the following order:

- Make sure the Oracle Insurance Insbridge Framework Administrator (IBFA) is installed.
- Restore the Databases first. There are three databases that must be in place.
  - OIDC_Client – Holds the login and user information.
  - OIDC_System – Holds the contents and logic of questionnaires created in Palette.
  - OIDC_LOGS – Logging is optional, but recommended. Oracle Support may request information from this database if you run into an issue with OIDC
- Install the Engine application on the same server as IBFA.
- Install the Palette application on the same server as IBFA.
- Update the application pool.
- Update the virtual directory.
- Log in to the Engine application.
  - Create new user
  - Change sysadmin password

NOTE	It is important to note that OIDC cannot be installed unless the Insbridge Framework Administrator is installed first.

NOTE	If you encounter any errors when running the database scripts, a message window will be displayed. Additional information will be in a log file that will be created only when script errors are present. This log file will contain the files that are by causing the error, listed by the creation date. These files will still be present after the application is uninstalled.

RESTORE THE OIDC DATABASES

A New OIDC installation begins with the database restore. Unzip the OIDC_4.4.5_Database.zip on the machine where the database will be restored. There will be three backup files located inside of the zip, 445_BLANK_CLIENT.bak, OIDC_445_BLANK_SYSTEM.bak and OIDC_445_BLANK_LOG.bak. Park the backups in a location where you can access them.

You can leave the default names or change them to whatever name you want. It is not required but it is strongly suggested that the database file names be changed to something that defines the databases more accurately.

IMPORTANT	It is strongly recommended that any database modification be performed by a qualified database administrator (DBA). The database setup procedures and tasks require the skill set of a database administrator. If you are not a database administrator, please stop. Improper setup may result in unwelcome changes to the database. Please consult with a qualified database administrator before proceeding.

The database installer should have administrator rights on the machine where the database will be restored. SQL Server Management Studio must be installed.

1. Restore the OIDC_445_BLANK_CLIENT.bak, OIDC_445_BLANK_SYSTEM.bak and OIDC_445_BLANK_LOG.bak databases.

2. Set the client database compatibility level to: SQL Server 2005(90). This is required for Dynamic Customer List and Quote List. Right click the Client database → Properties→Options.

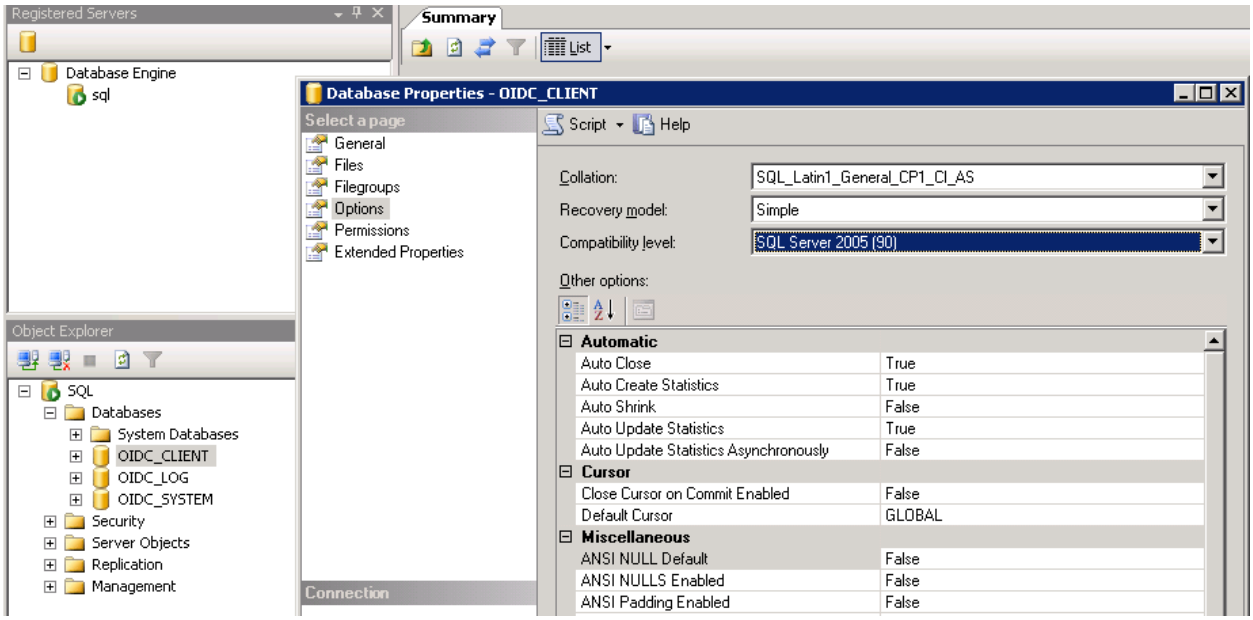


Figure 15 Setting Client Database to SQL Server 2005 (90)

3. Palette and Engine can be installed once the databases are restored. The installation of Palette and Engine will require:

   - Database server name or URL
   - Database name
   - Login
   - Password

NOTE	In the OIDC_445_Database.zip there is another zip file, DBUpdaterScripts.zip and a DBUpdaterInstall.msi file. Those files will not be needed for a new installation.

OIDC ENGINE INSTALLATION

Open the OIDC Engine folder.

During the installation, the installation program requires the installer have administrator rights on the machine where the install is occurring. Please close all open applications and run the setup.exe file located in the Engine file on the same machine as the IBFA.

NOTE	Engine and Palette must be on the same machine as IBFA. If Insbridge is not installed, OIDC will not be able to be installed. The default directory structure of a NEW OIDC installation will be: C:\Program Files\Oracle\IGBU\DataCapture. Previous installs, including updates, may be located under the Insbridge\Webs folder. A different default directory structure can be selected by the installer.

A check of system requirements will be performed. Any missing component will result in an error message. For example, if the installation does not find .NET 4.0, you will be asked if you want to install this from Microsoft.

If all requirements have been met, a Welcome screen will be displayed.

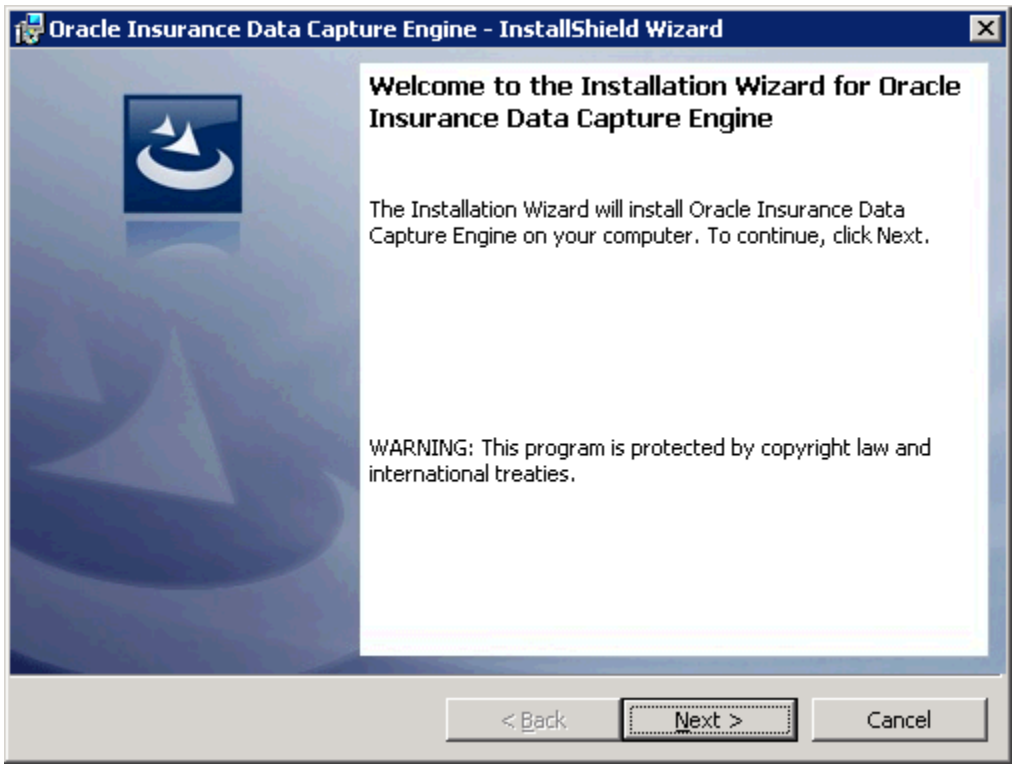


Figure 16 Welcome to Installing OIDC

1. Please close all open applications and run the **setup.exe**. Click on **Next** to continue.

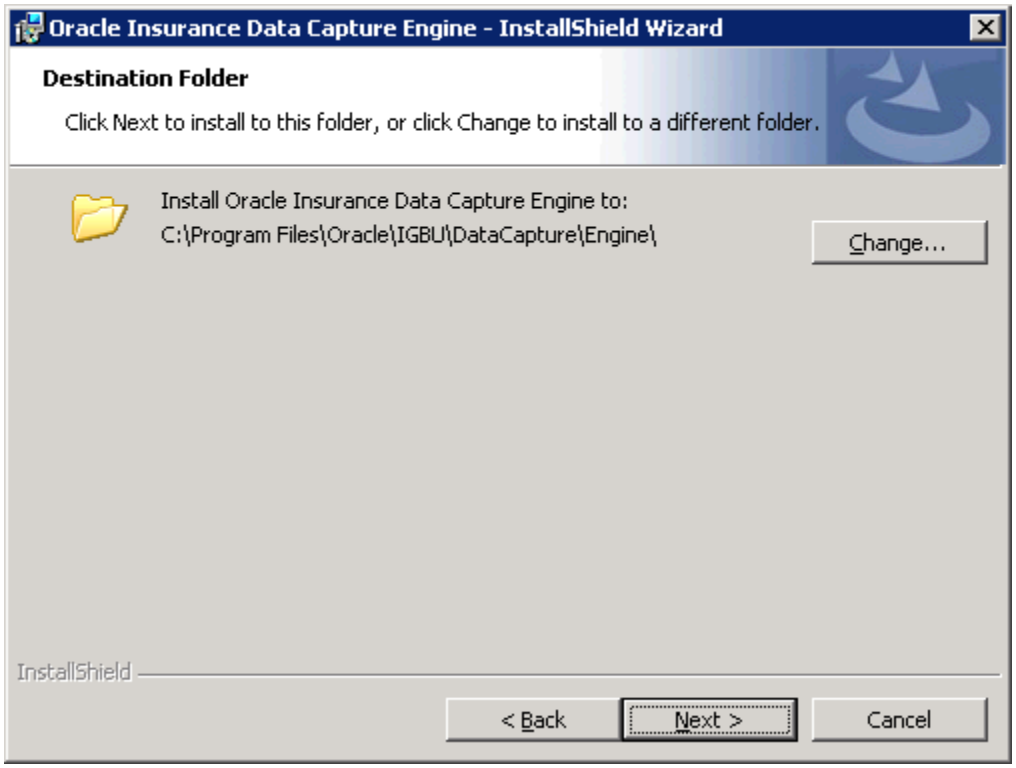


Figure 17 Selecting Installation Path

2. You have the option to select another installation directory. If you want another destination directory, browse for the directory you want to use. If the default installation directory is acceptable, Click **Next**.

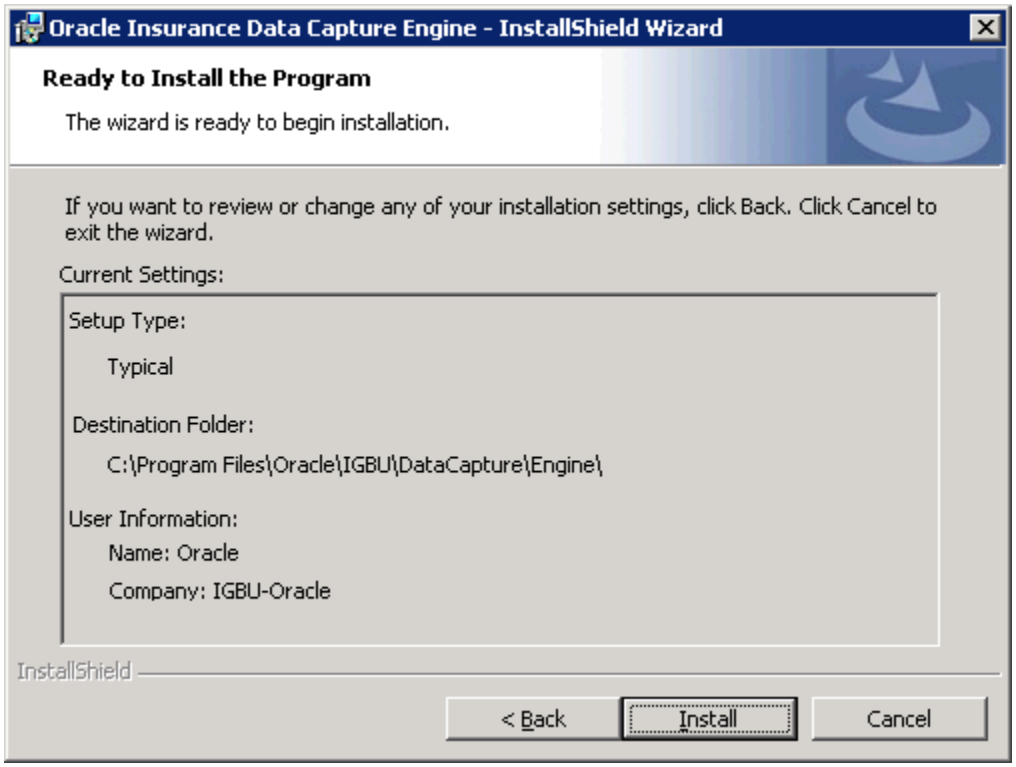


Figure 18 Ready to Install

3. An information screen will be presented. If the information is correct, click **Install**. A progress screen will be displayed.

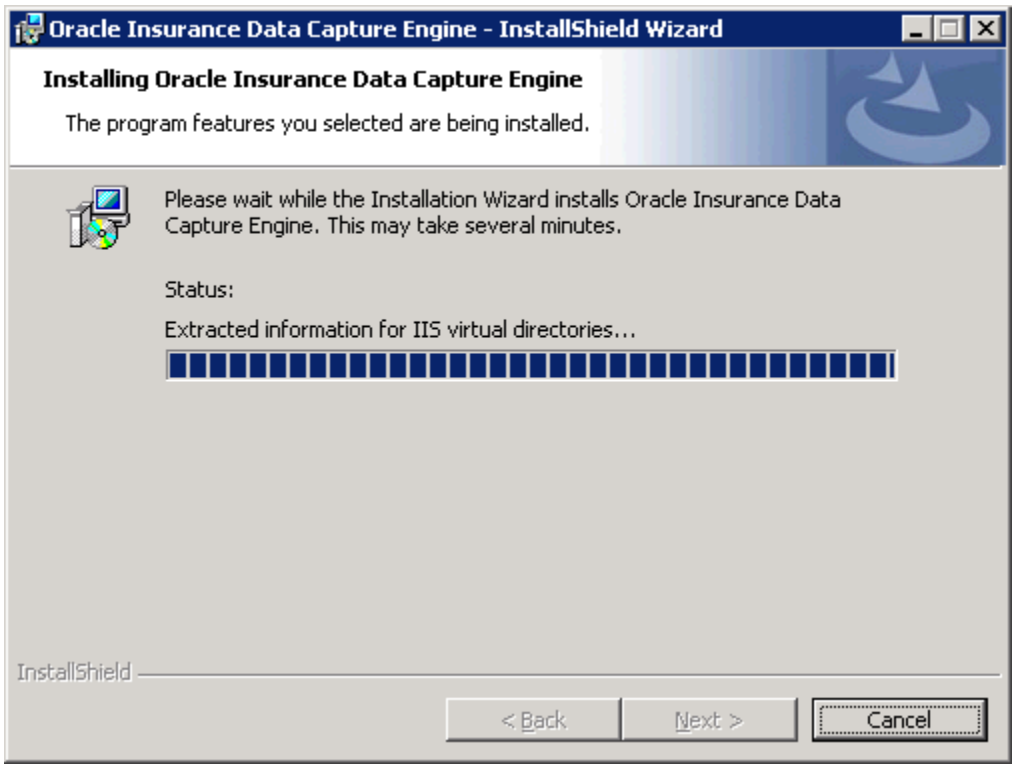


Figure 19 Engine Installation Progress

If the information is not correct, click **Back** to return to the previous screen. Make your changes and then install when you are ready

4. Enter in the database information. There will be three sections; one for System one for Client and one for Logs. Please complete all three.

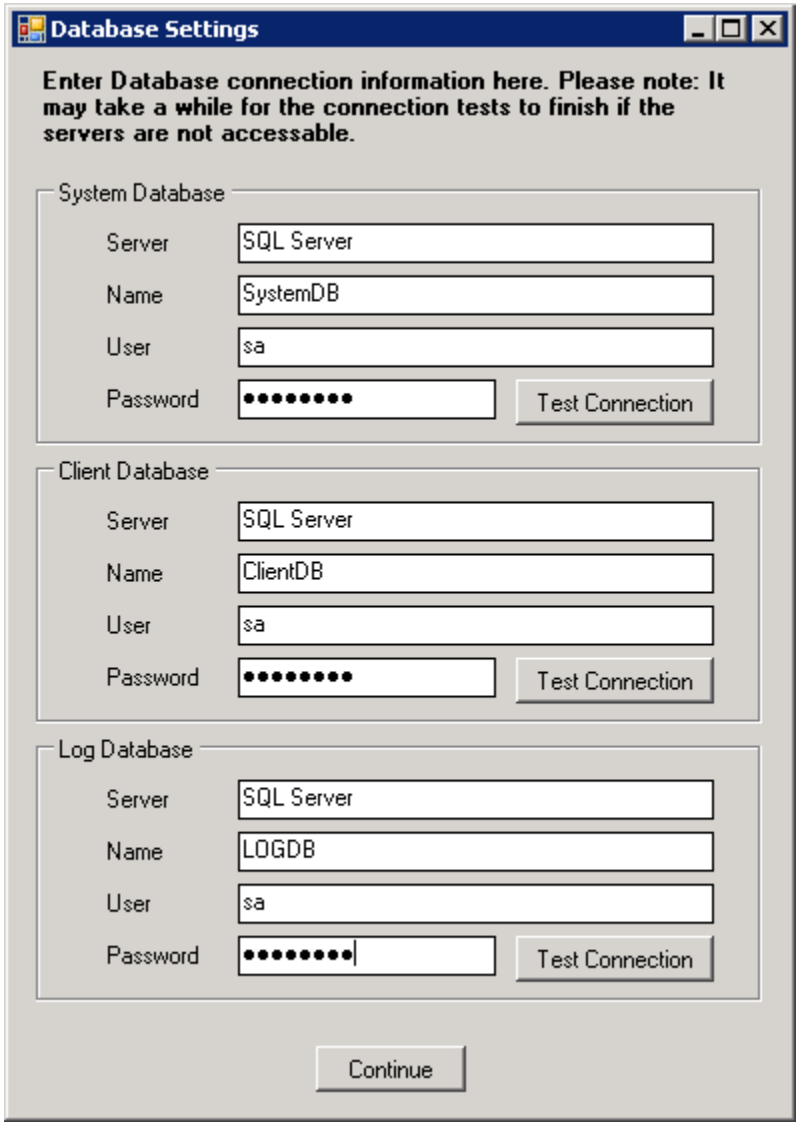


Figure 20 Entering Database Information

NOTE	Database connection information is validated at this point. If there is a problem, you must correct in order to continue. You also can check the database information in the web.config file. Please see Manually Updating Web.Config File.

5. When you are finished, click **CONTINUE**.

6. When the installation is complete, click **FINISH** to close the installer.

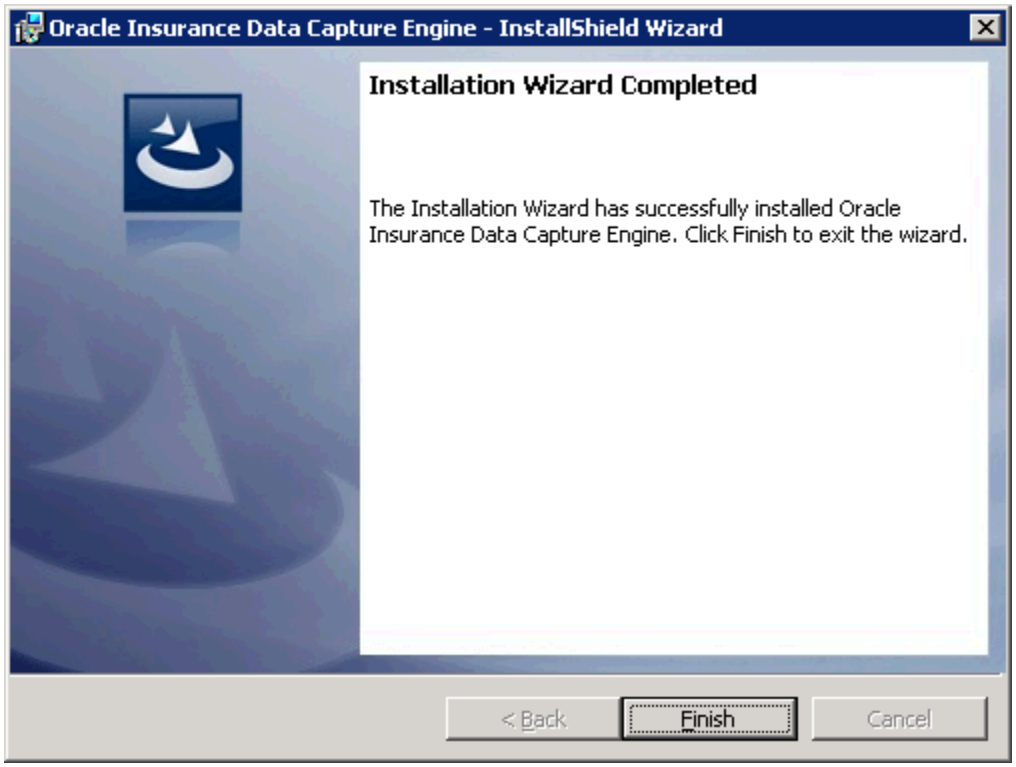


Figure 21 Completed Engine Installation

OIDC PALETTE INSTALLATION

Open the OIDC Palette folder.

During the installation, the installation program requires the installer have administrator rights on the machine where the install is occurring. Please close all open applications and run the setup.exe file located in the Palette file on the same machine as the IBFA.

NOTE	Engine and Palette must be on the same machine as IBFA. If Insbridge is not installed, OIDC will not be able to be installed. The default directory structure of a NEW OIDC installation will be: C:\Program Files\Oracle\IGBU\DataCapture. Previous installs, including updates, may be located under the Insbridge\Webs folder. A different default directory structure can be selected by the installer.

A check of system requirements will be performed. Any missing component will result in an error message. For example, if the installation does not find .NET 4.0, you will be asked if you want to install this from Microsoft.

If all requirements have been met, a Welcome screen will be displayed.

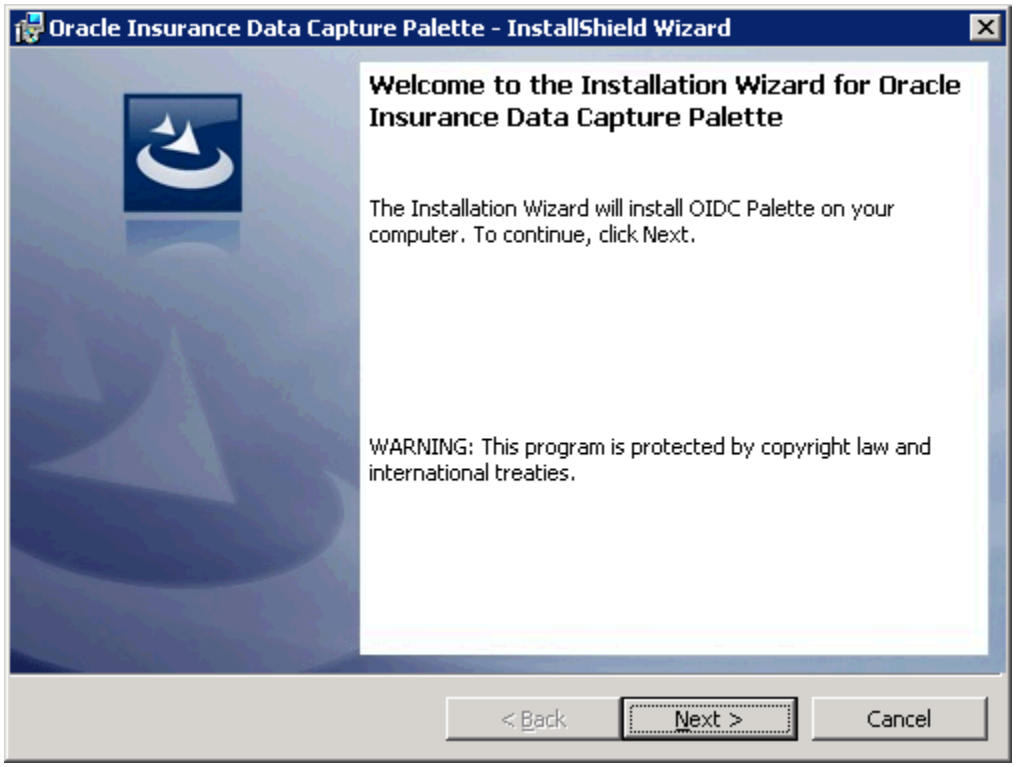


Figure 22 Welcome to Installing OIDC

1. Please close all open applications and run the **setup.exe**. Click on **Next** to continue.

2. You have the option to select another installation directory. If you want another destination directory, browse for the directory you want to use. If the default installation directory is acceptable, Click **Next**.

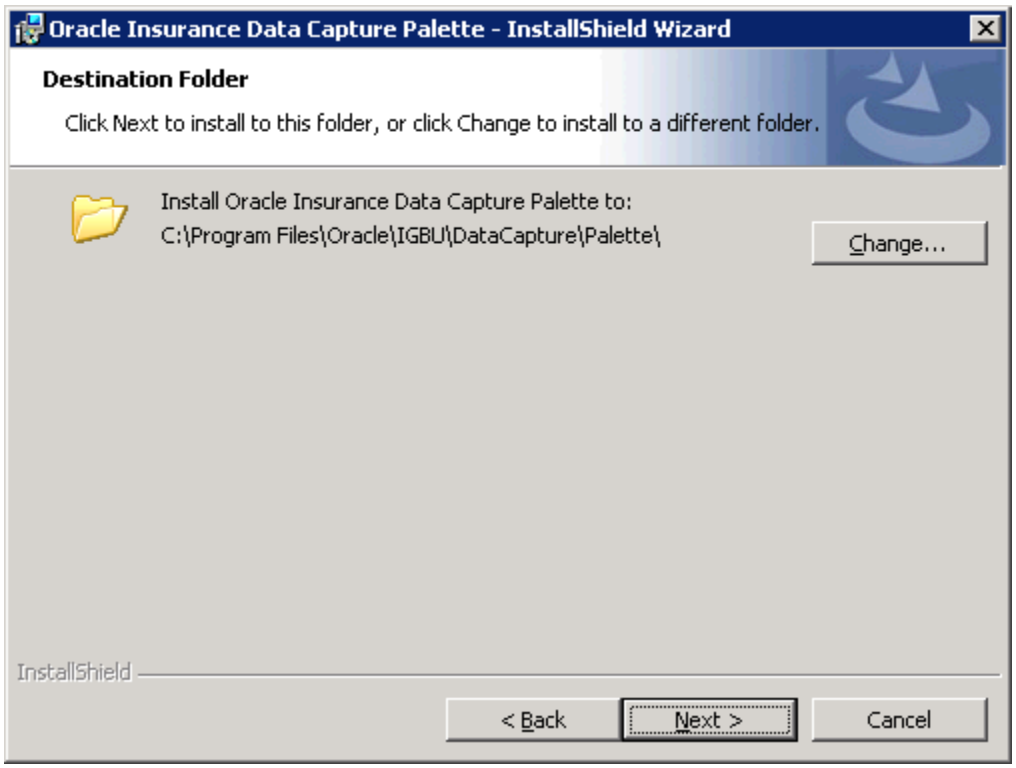


Figure 23 Selecting the Destination Folder

3. An information screen will be presented. If the information is correct, click **Install**.

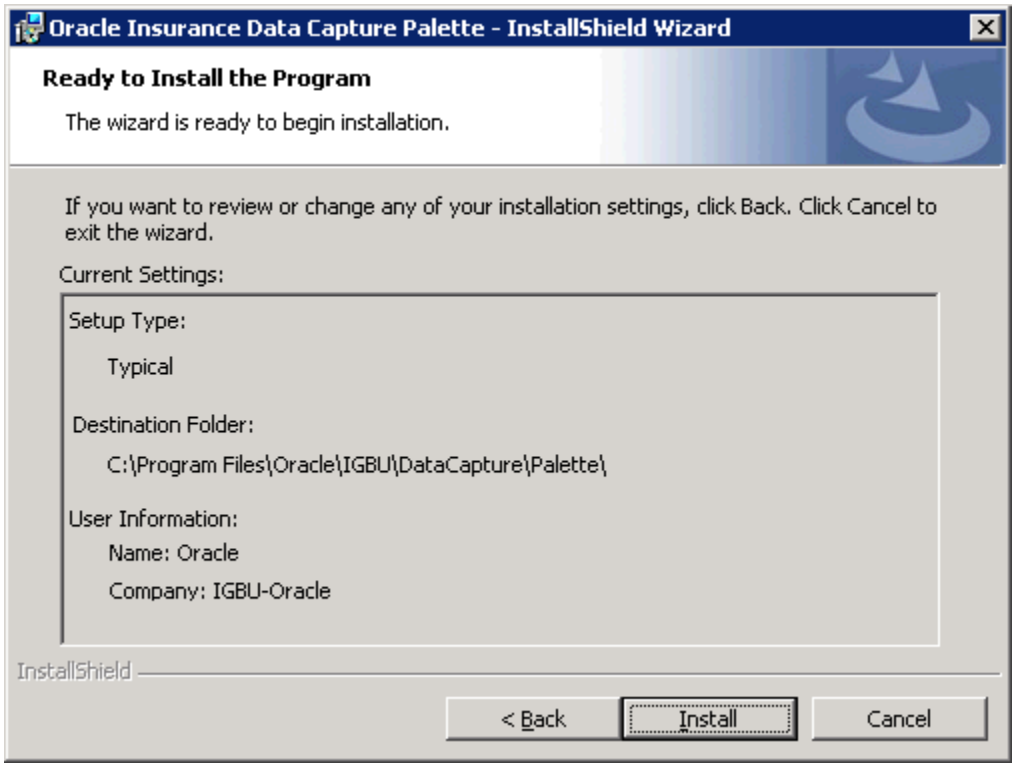


Figure 24 Ready to Install

If the information is not correct, click **Back** to return to the previous screen. Make your changes and then install when you are ready.

4. A progress screen will be displayed.

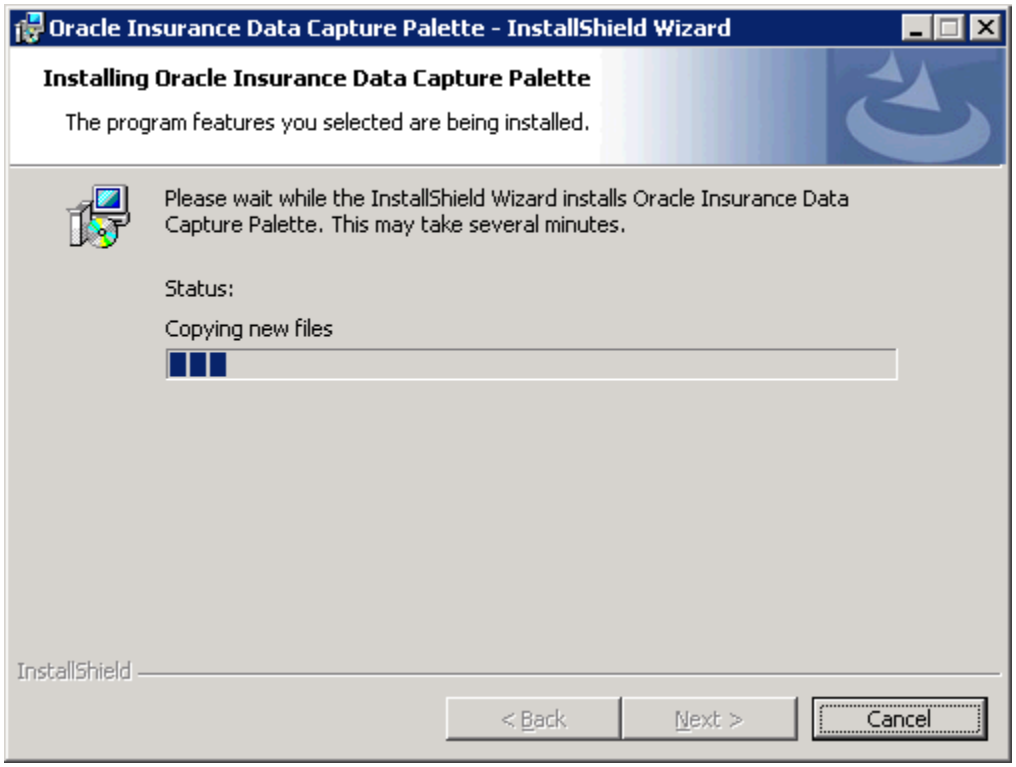


Figure 25 Engine Installation Progress

5. Enter in the System database information.

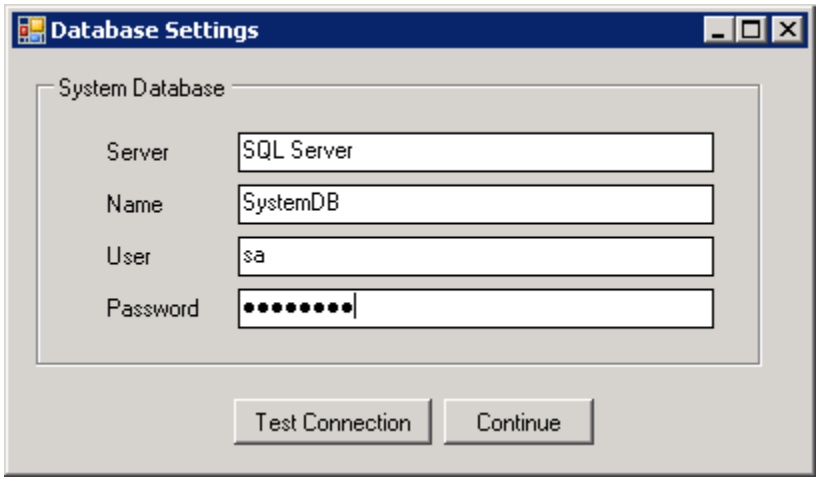


Figure 26 Entering Database Information

NOTE	Database connection information is validated at this point. If there is a problem, you must correct in order to continue. You also can check the database information in the web.config file. Please see Manually Updating Web.Config File.

6. When you are finished, click **CONTINUE**.

7. Click **Finish** to finish the install.

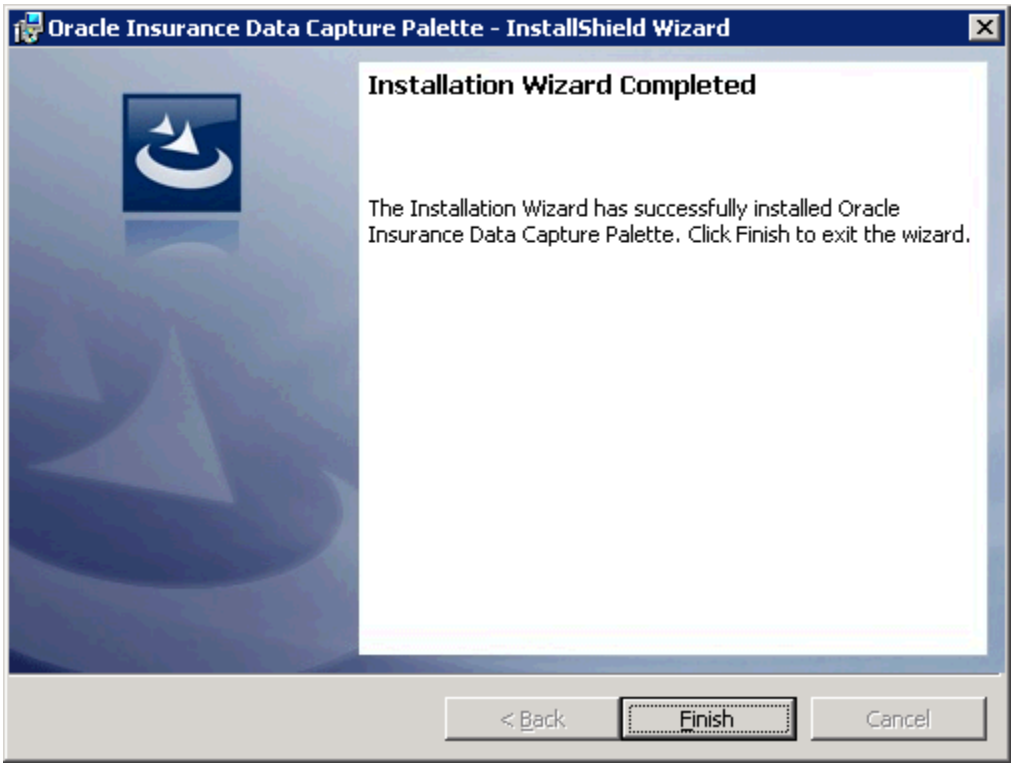


Figure 27 Completed Palette Install

SERVER CONFIGURATIONS FOR OIDC

An unstable session state may cause errors. To reduce the possibility of session state errors, you should create a separate OIDC application pool and then assign OIDCP and OIDCE to operate under this application pool.

The Virtual Directory should be deleted and re-created to reduce the possibility of session state errors. This should be done after the application pool.

Lastly, to allow for quicker server response times you will need to enable compression.

Updating the OIDC Application Pool

The application pool should be created first.

1. Click **Start** → **Administrative Tools** → select **IIS Manager**.
2. Expand the **Local Computer** and select **Application Pools**. Right click and select **New** → **Application Pool**.

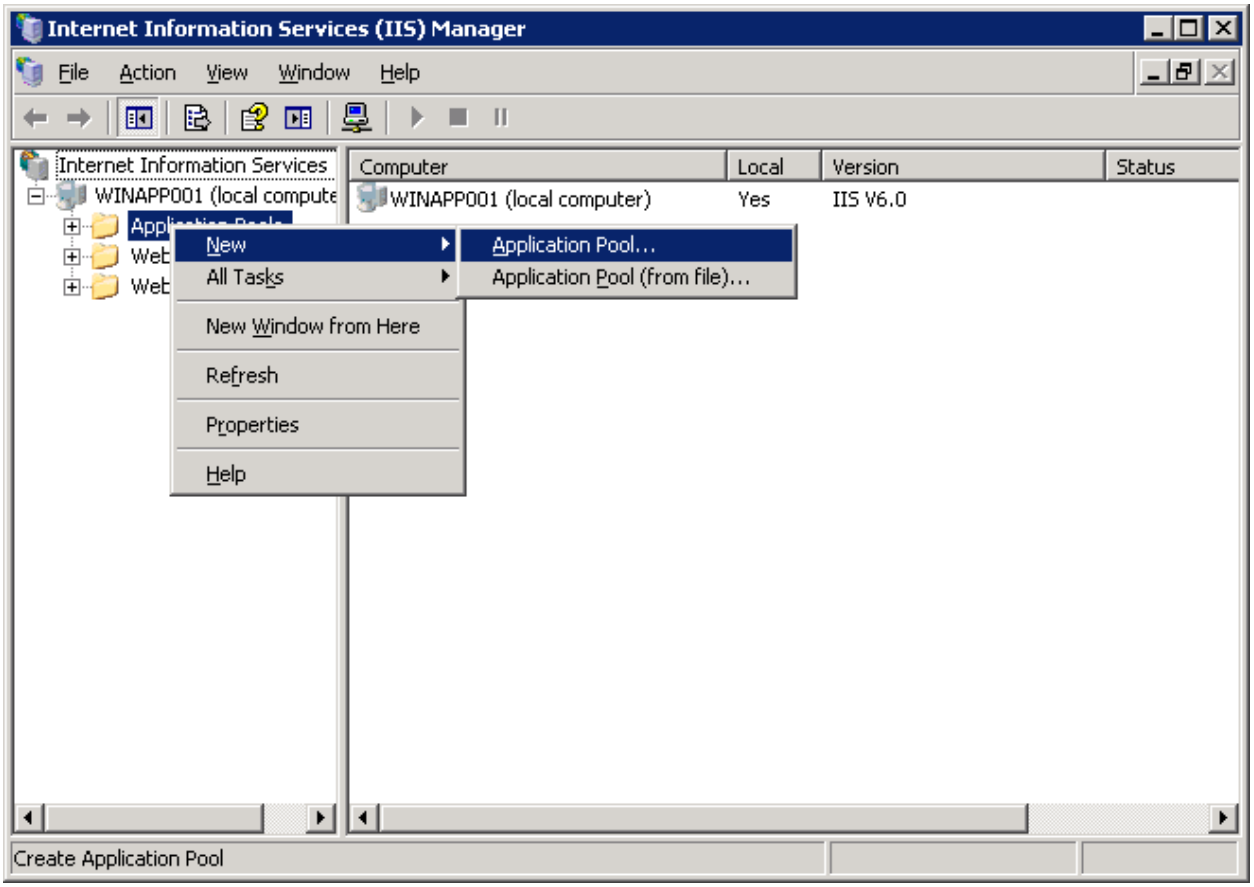


Figure 28 Navigating to Application Pool

3. Enter "**OIDC**" for the Application pool ID and click **OK**. You will be returned to the IIS screen. Your new application pool will be listed.

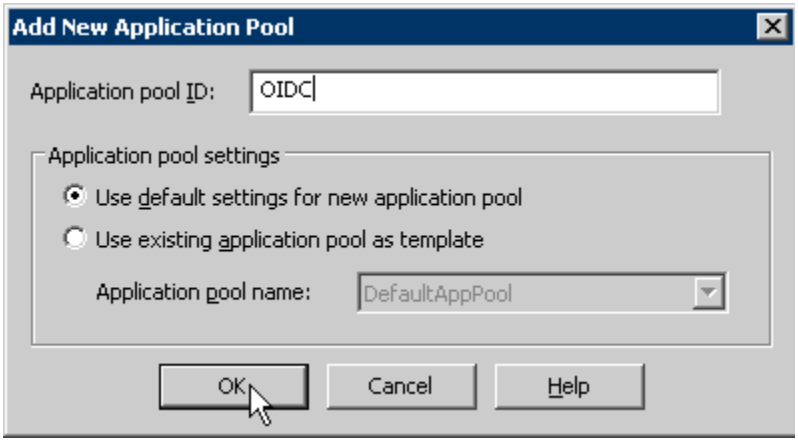


Figure 29 Creating a New Application Pool

4. Right click the OIDC Application Pool you created and select **Properties**.

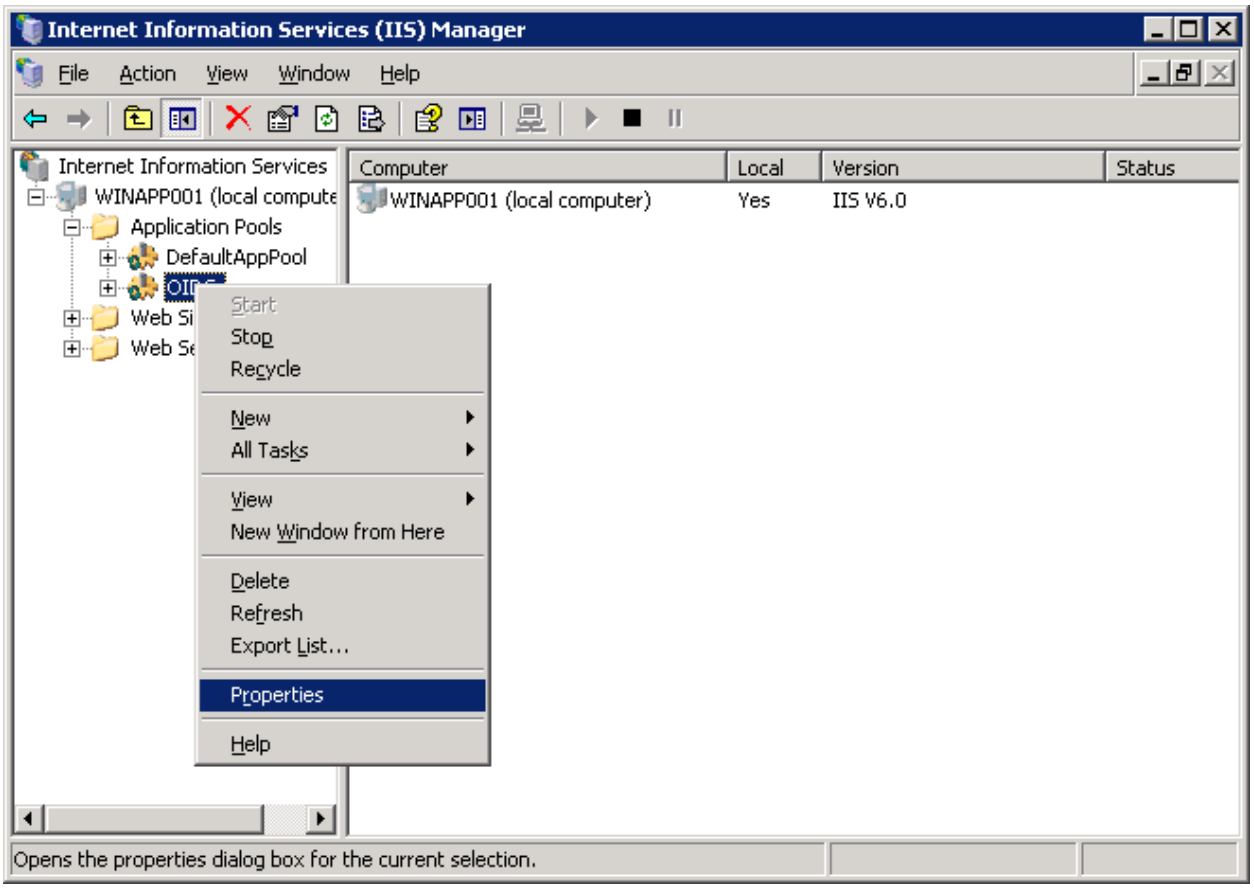


Figure 30 Selecting Application Pool Properties

5. Click the Performance tab and verify that **Idle Timeout** and **Request queue limit are unchecked**. Click **Apply**, and then **OK**. You will be returned to the IIS screen.

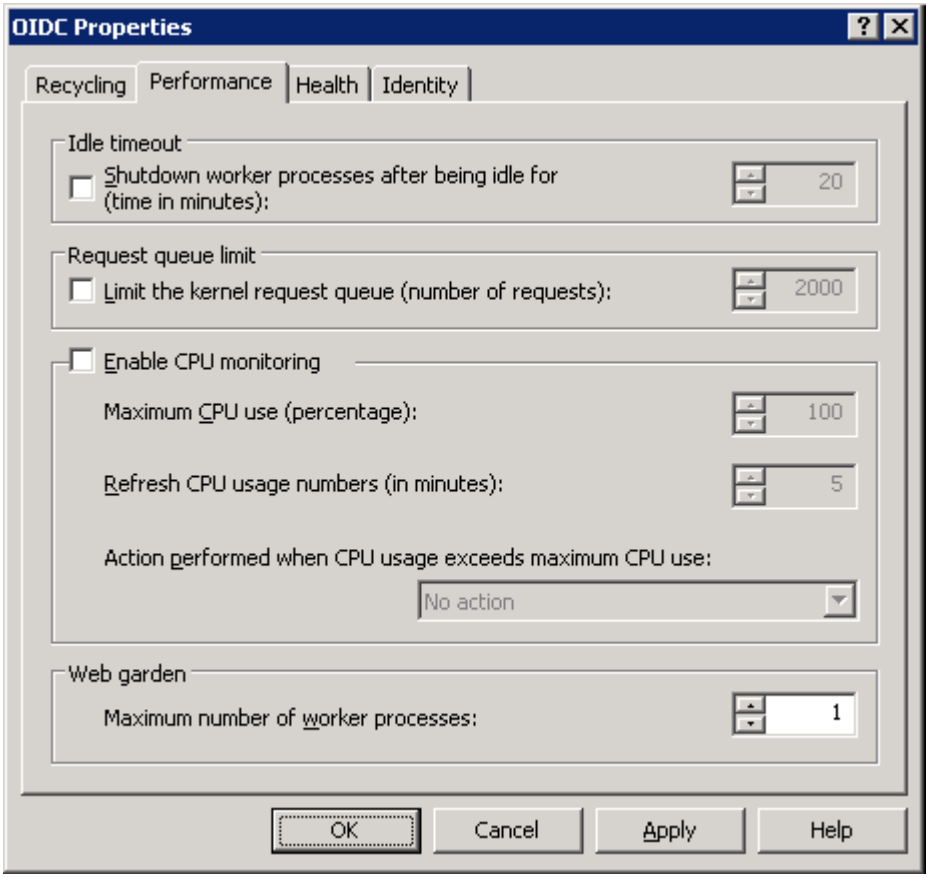


Figure 31 Setting Performance Options

Updating the OIDC Virtual Directory

The Virtual Directory should be deleted and re-created.

1. Click **Start** → **Administrative Tools** → select **IIS Manager**.
2. Expand the **Local Server** → **Web Sites** → **Default Web Site**, select **OIDCP**.
3. Right click and select **Delete**.

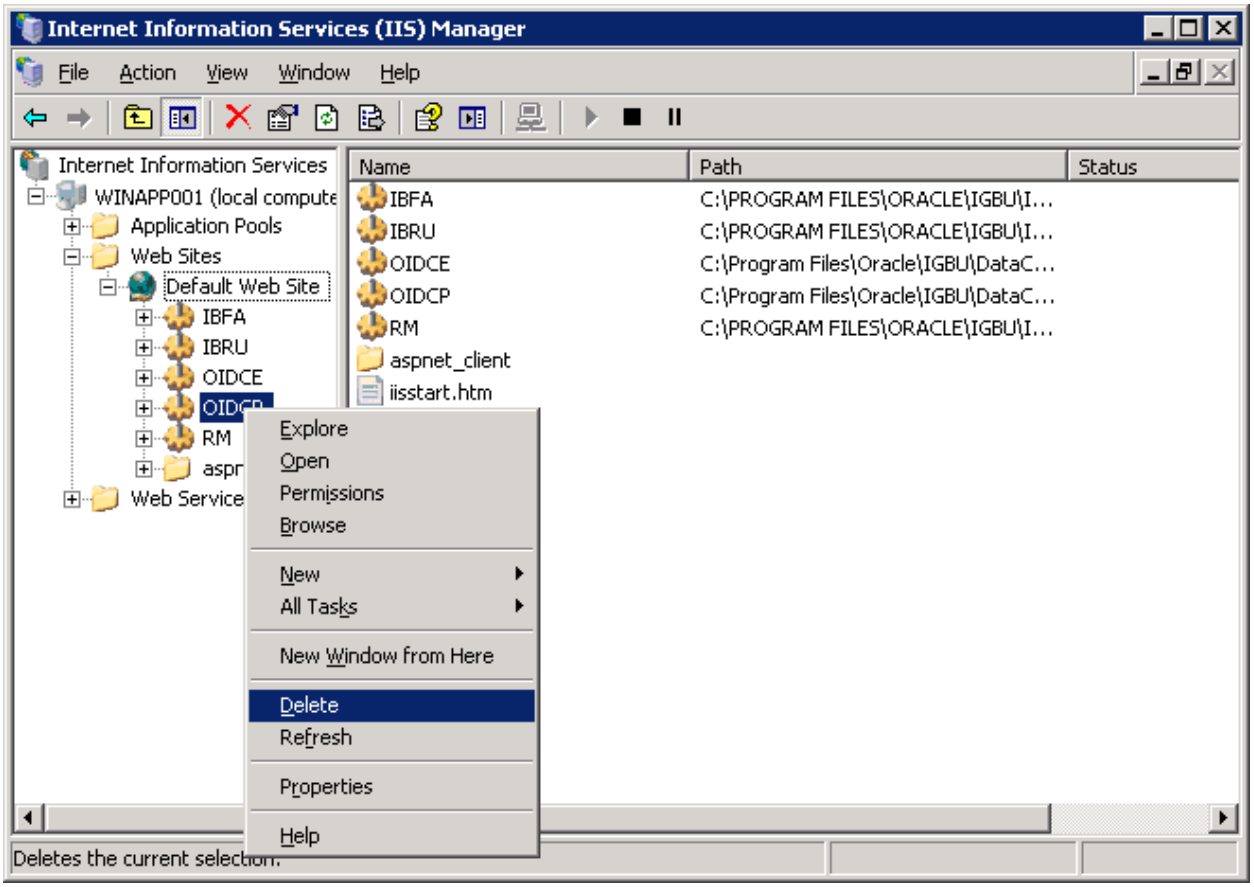


Figure 32 Deleting the Virtual Directory

4. You will be asked to confirm your deletion. Select **Yes** to delete.
5. Stay in IIS Manager. Under **Local Server** → **Web Sites** → **Default Web Site**, select **OIDCE**.
6. Right click and select **Delete**.
7. You will be asked to confirm your deletion. Select **Yes** to delete.

8. Stay in IIS Manager. Under **Local Server → Web Sites**, select **Default Web Site**, right click and select **New → Virtual Directory**.

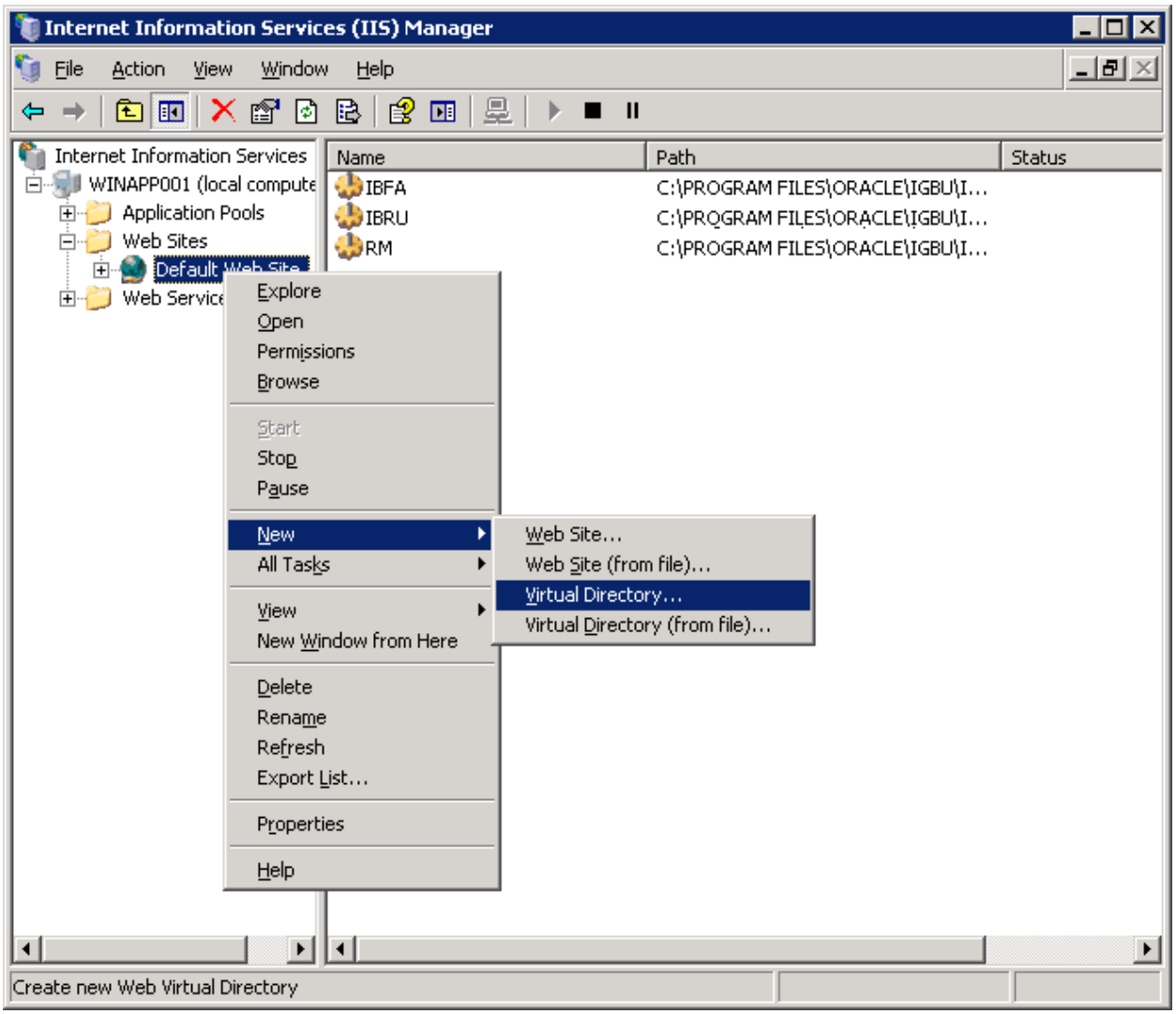


Figure 33 Creating New Virtual Directory

9. The Virtual Directory Wizard will be displayed. Click **Next** to continue.

Figure 34 Virtual Directory Wizard

10. Enter "**OIDCE**" for the Alias name. Click **Next** to continue.

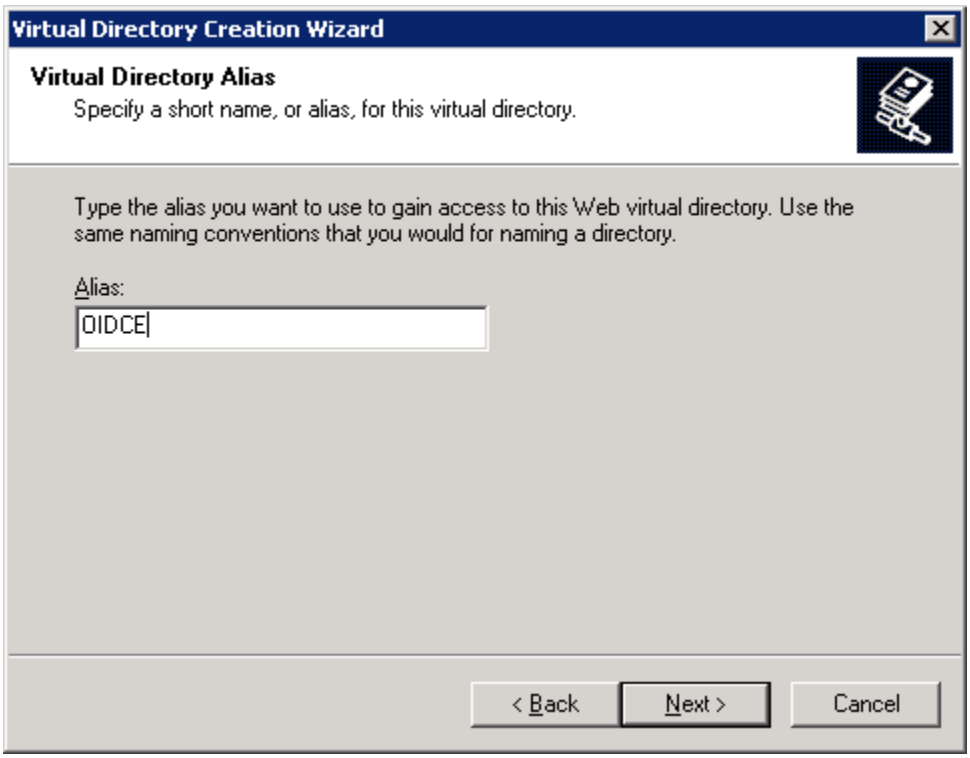


Figure 35 Creating a New Application Pool Alias

11. Enter the directory path or click Browse to select the path of OIDC Engine. Click **Next**.

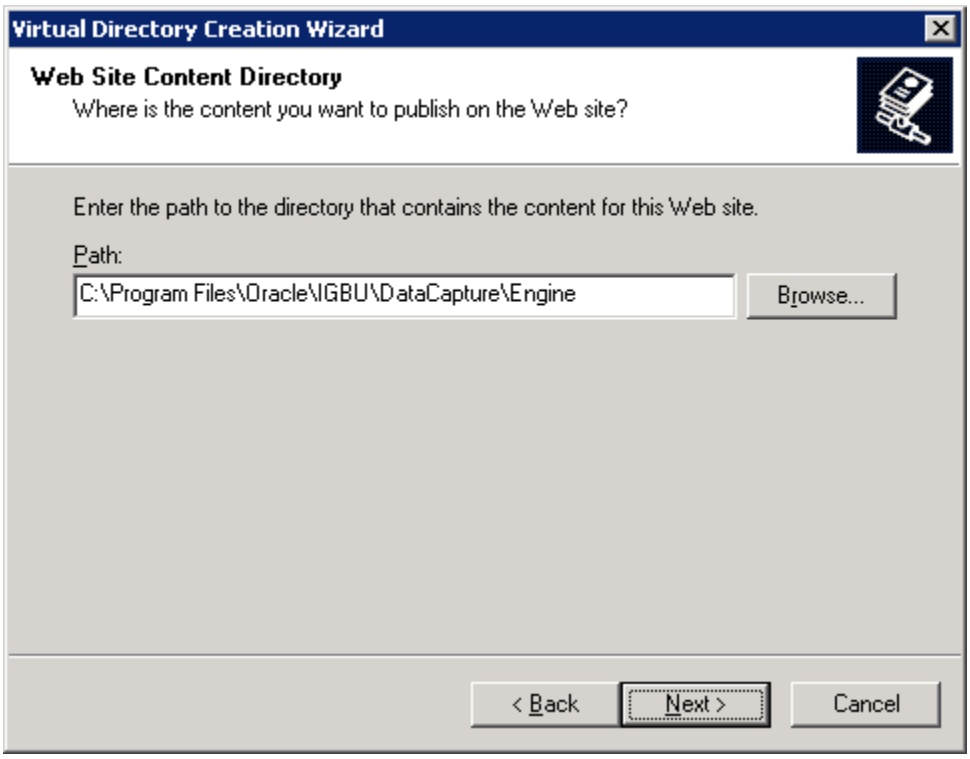


Figure 36 Selecting the Directory Path

12. Select **Read**, **Run scripts** and **Execute**. Click **Next**.

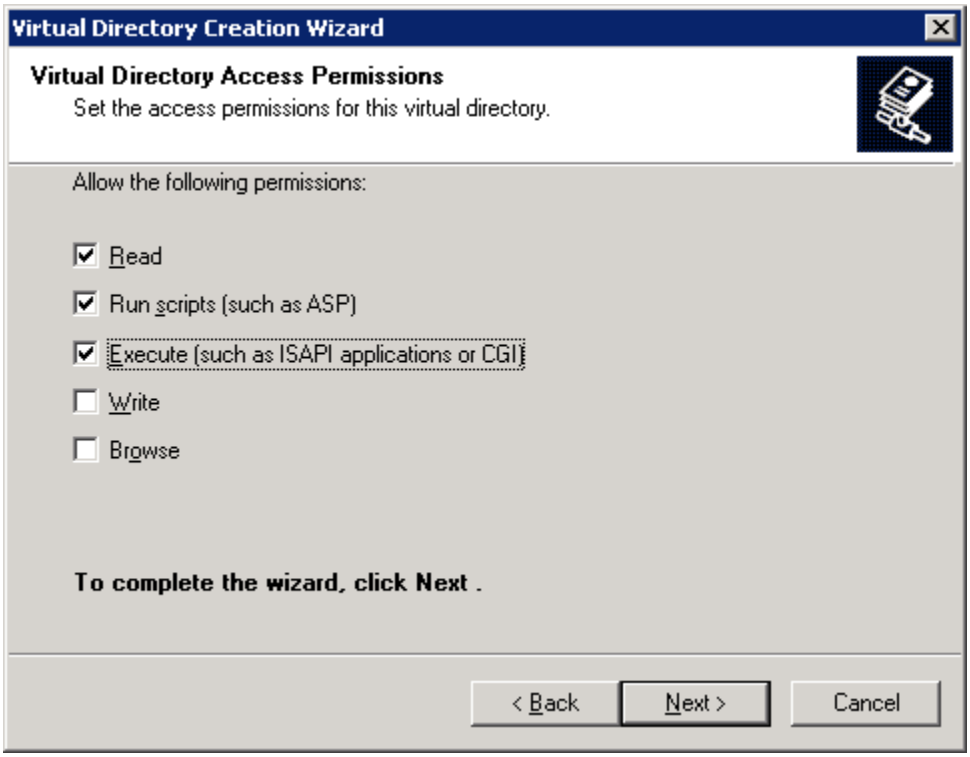


Figure 37 Setting Performance Options

13. Click **Finish** to create the virtual directory.

Figure 38 Finish Creating Directory

14. Stay in IIS Manager. Under **Local Server → Web Sites → Default Web Site**, select the newly created **OIDCE**. Right click and select **Properties**.

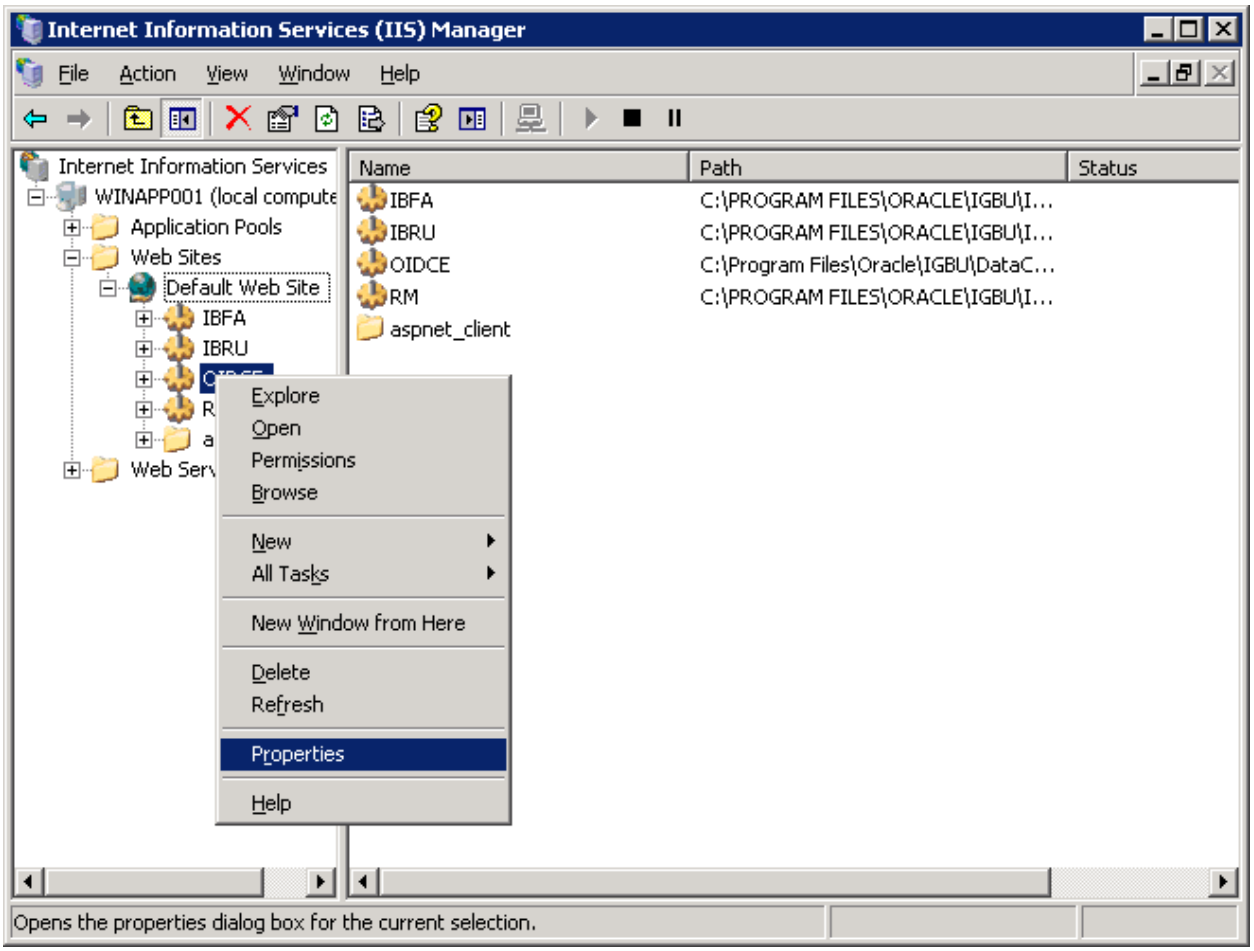


Figure 39 Selecting Virtual Directory Properties

A separate window will be displayed.

15. On the Virtual Directory tab, select the **OIDC Application Pool**.

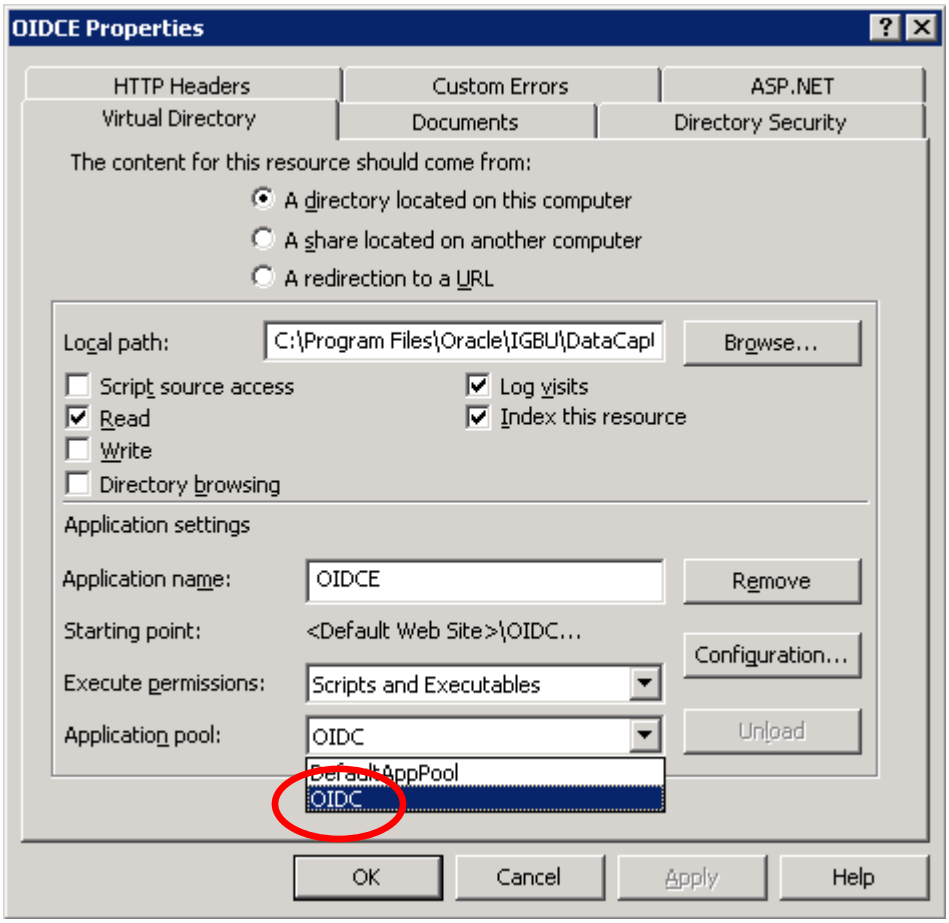


Figure 40 Selecting the OIDC Application Pool

16. On the Documentation tab, make sure that **default.aspx** is listed. It is recommended that you delete the other default content pages, but it is not required.

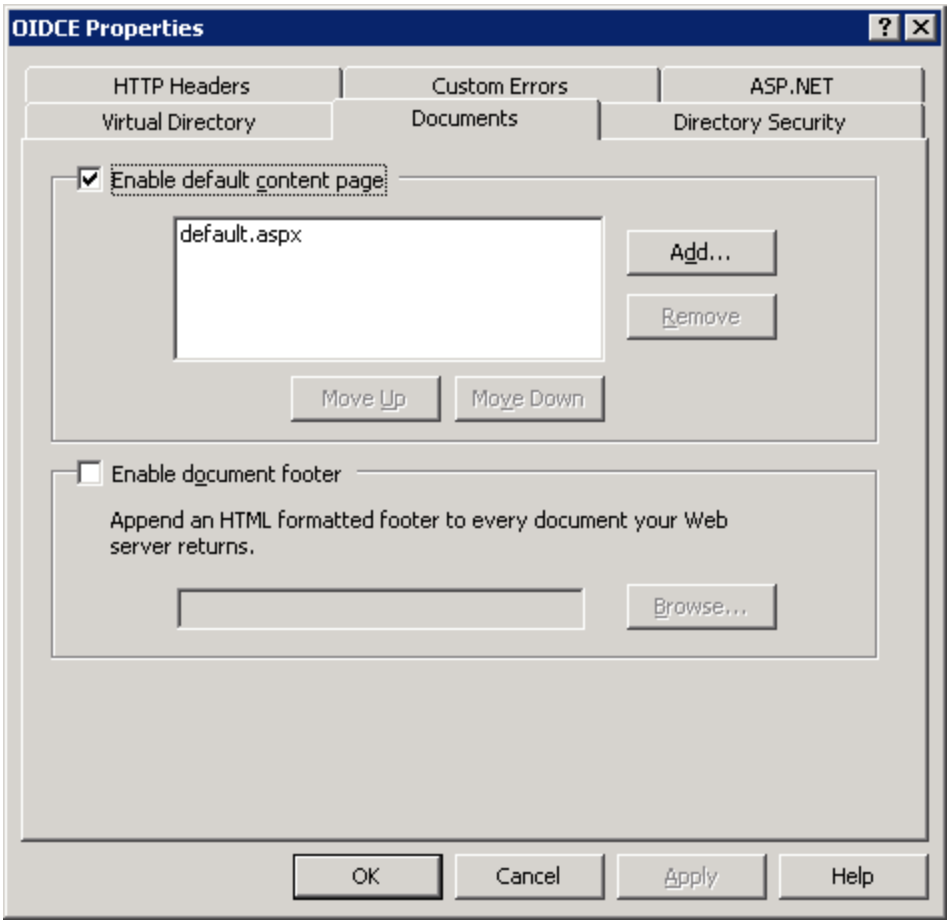


Figure 41 Setting the Default Content Page

17. On the Directory Security tab, click Edit to open the Authentication Methods. Verify that Enable anonymous access is checked.

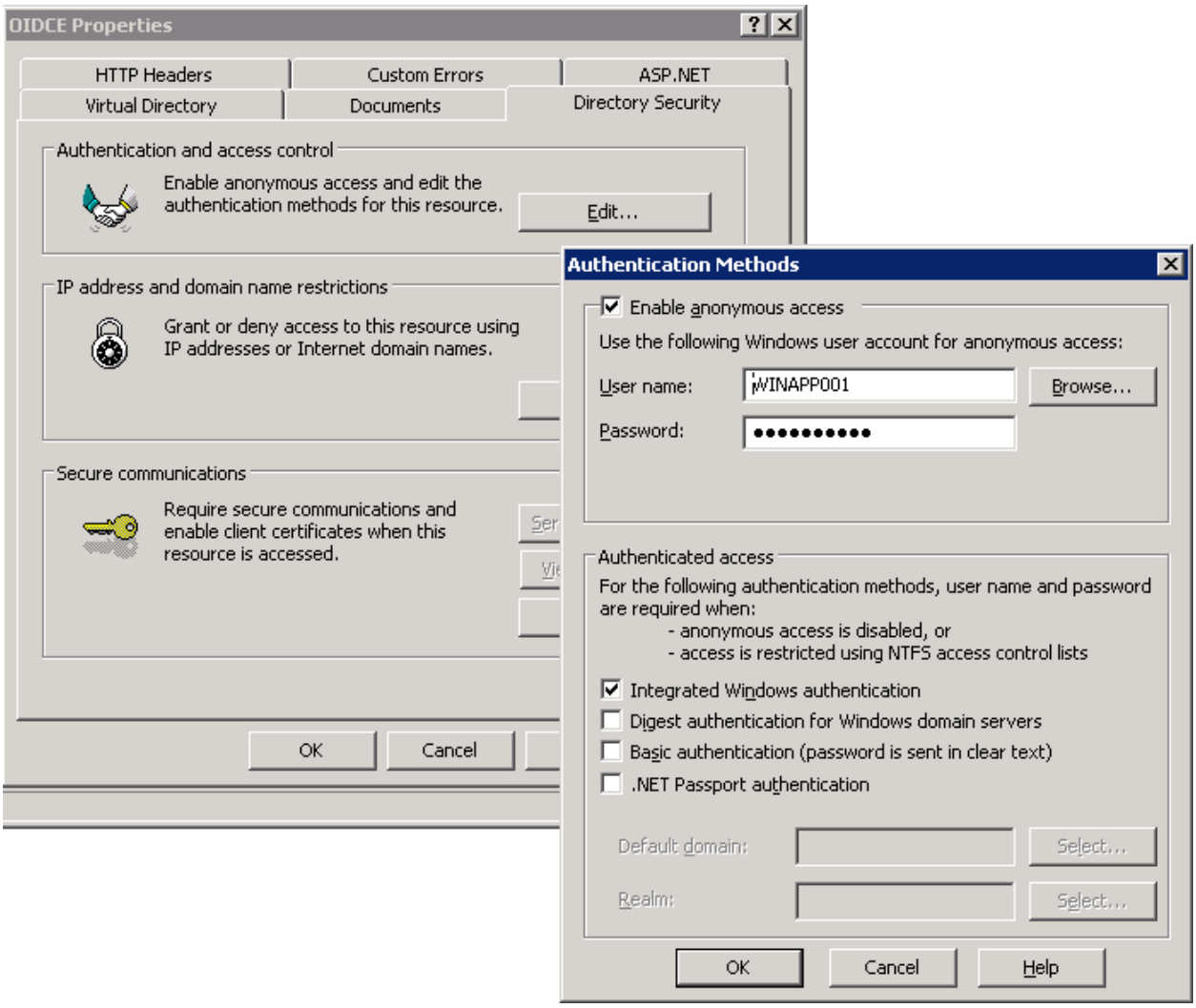


Figure 42 Verifying Anonymous Access

18. On the ASP.NET tab, select ASP 4.0.

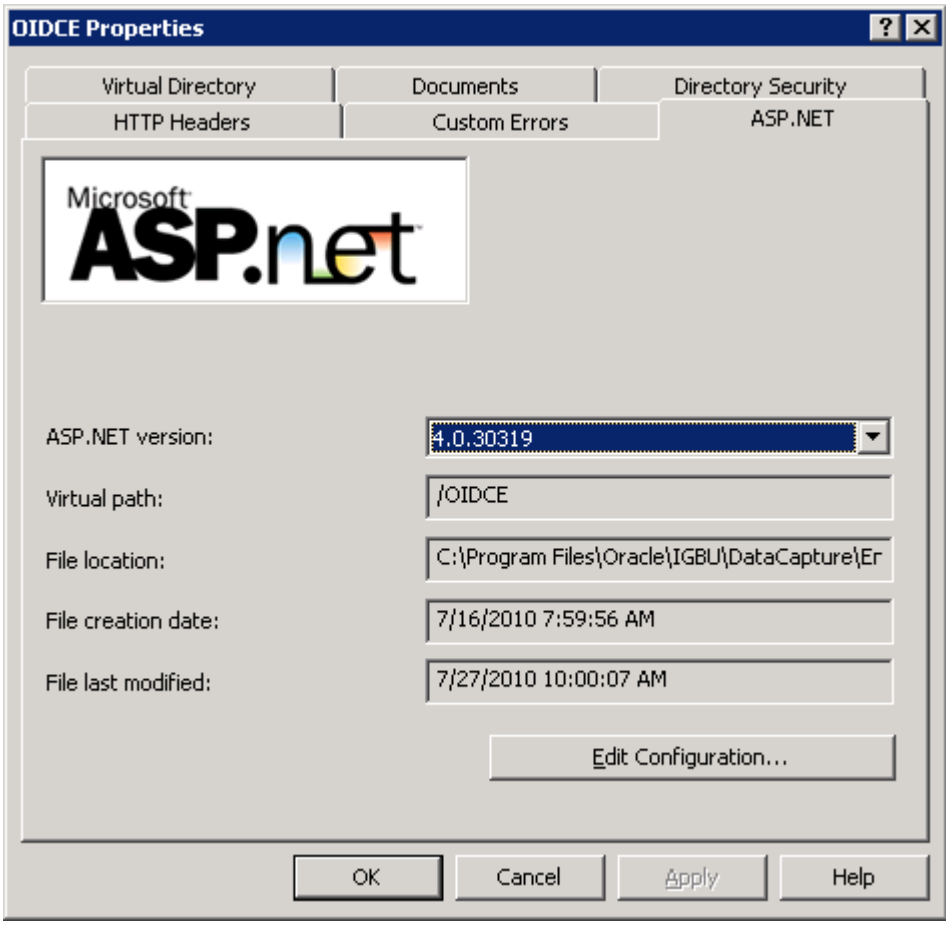


Figure 43 Selecting ASP.NET 4.0

19. Click OK to save your selections.

20. Repeat the process for **OIDCP**. Create a new Virtual Directory and select the proper settings.

21. After both Virtual Directories have been created and set, open Internet Information Services (IIS) Manager in the administration tools.

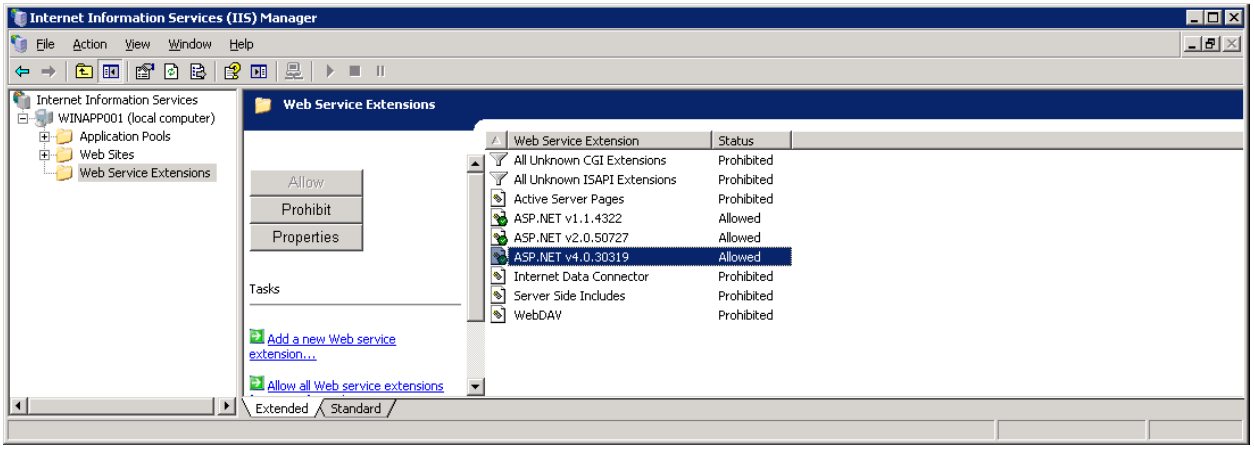


Figure 44 Allowing ASP.NET 4.0

22. Verify that **ASP.NET 4.0** is allowed.

Settings for Compression

The last item to update is compression settings.

The Virtual Directory should be deleted and re-created.

1. Click **Start** → **Administrative Tools** → select **IIS Manager**.
2. Expand the **Local Server** and select **Web Sites**.
3. Right click and select **Properties**.

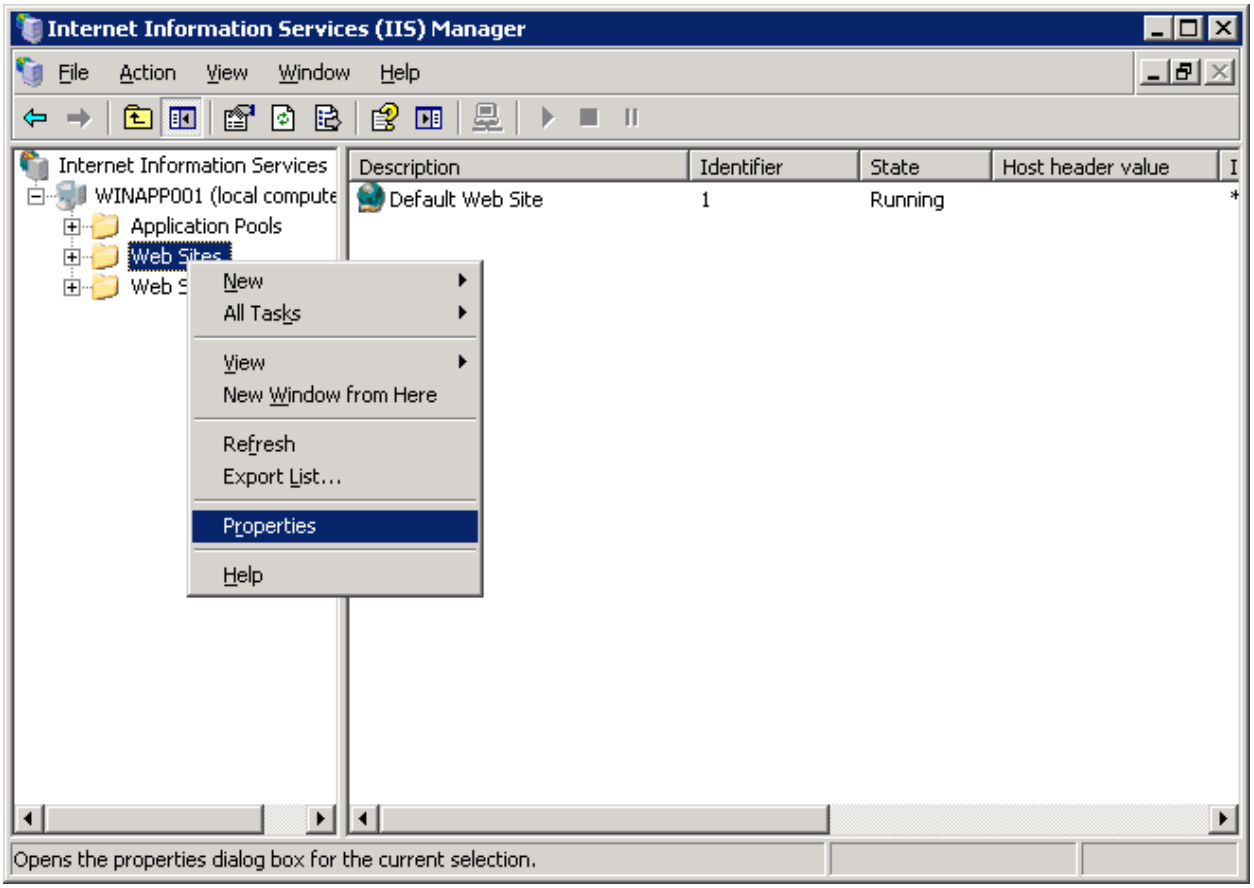
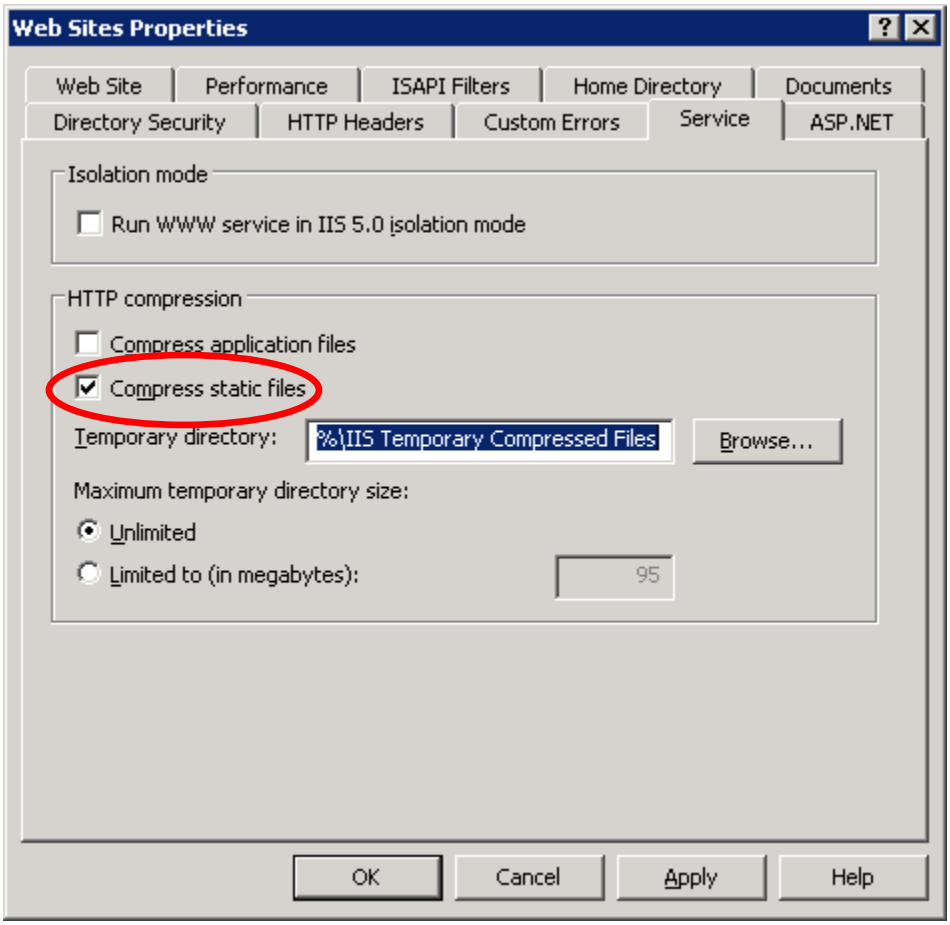


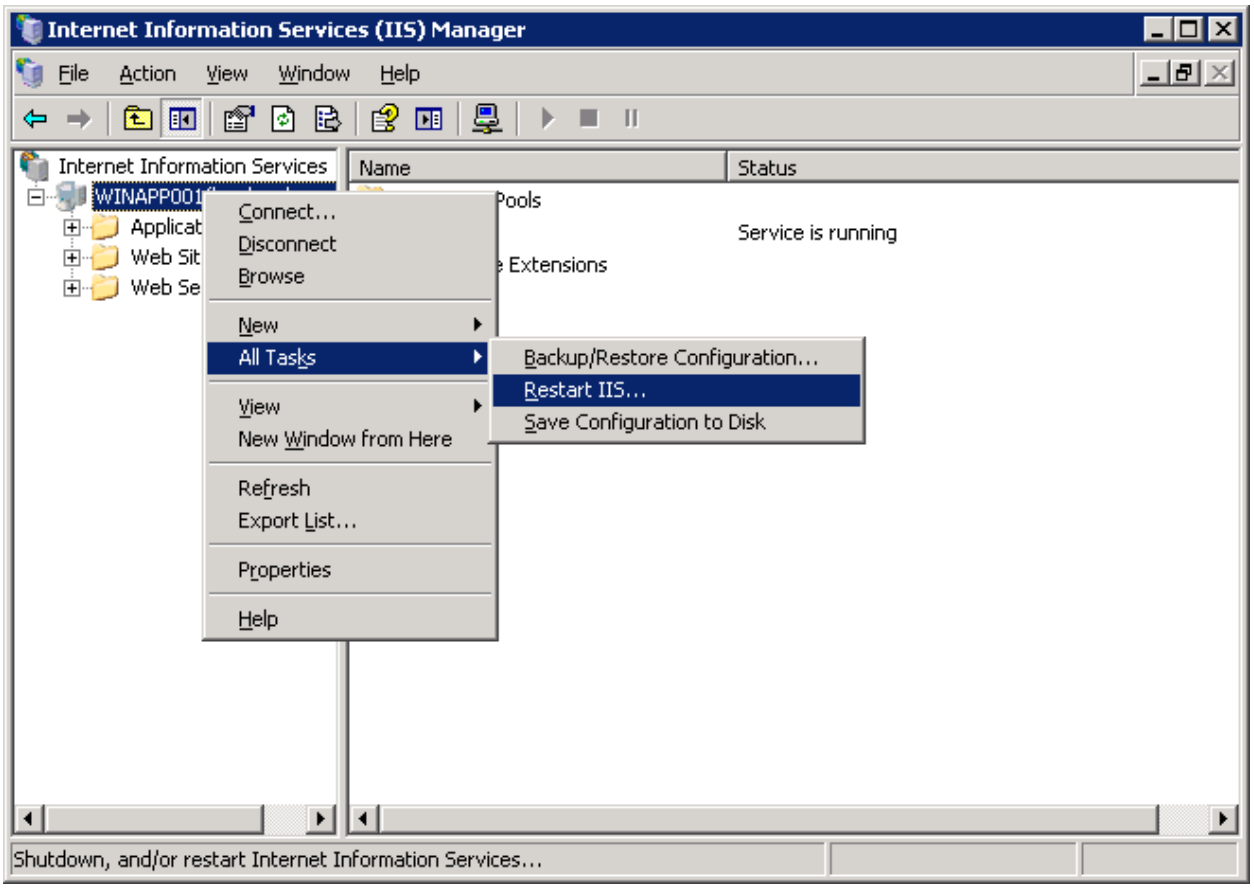
Figure 45 Selecting Properties

4. On the Properties screen. Select the **Service** tab.



5. Check **Compress static files**.
6. Click **Apply**.
7. Click **OK** to close the window.

8. After you have created an OIDC Application Pool, deleted and created virtual directories, and set compression, you should restart IIS. On the IIS screen, right click **All Tasks → Restart IIS**.



9. Click **OK** to restart.

Chapter 5

MANUALLY UPDATING WEB.CONFIG FILE

You can manually update the connection string information in the web.config file. If you were able to complete the connection string information in the installation, you do not need to perform this step. If you are experiencing trouble with the application, you can manually check and update the connection string information.

NOTE	It is strongly recommended that you make a copy of the current web.config file before you make any changes. In the event you need to do a rollback, you will have a working copy to restore.

1. Once the databases have been restored, return to the server where Engine and Palette were installed. Follow the local path to the location of Engine. The local path will default to the initial installation path or a path selected by the installer. Two common paths are:

   C:\Program Files\Oracle\IGBU\DataCapture\Engine

   C:\Program Files\InsBridge\Webs\OIDC\iQuestionnaire (for older installations)

2. Open the **web.config** file in Notepad.

3. Go down to the **connectionStrings** section. You will have to manually enter in the connection string information. There are four fields in each of the four connection strings that must be completed.

   The highlighted fields in the example below demonstrate where you will need to make an entry.

```
<connectionStrings>
    <add name="AgentRaterSystemDatabase" connectionString="Password=Password;User
ID=sa;Initial Catalog=OIDC_SYSTEM;Data Source=SERVER;"
providerName="System.Data.SqlClient" />
    <add name="AgentRaterClientDatabase" connectionString="Password=Password;User ID=
sa;Initial Catalog=OIDC_CLIENT;Data Source=SERVER;"
providerName="System.Data.SqlClient" />
    <add name="AgentRaterLoggingDatabase" connectionString="Password=Password;User
ID=sa;Initial Catalog=OIDC_LOG;Data Source=SERVER;"
providerName="System.Data.SqlClient" />
    <add name="AgentRaterSystemDatabaseEF"
connectionString="metadata=res://*/Data.EFSystemDB.csdl|res://*/Data.EFSystemDB.ssdl|
res://*/Data.EFSystemDB.msl;provider=System.Data.SqlClient;provider connection
string=&quot;Password=Password;User ID=sa;Initial Catalog=OIDC_SYSTEM;Data
Source=SERVER;&quot;" providerName="System.Data.SqlClient" />
  </connectionStrings>
```

   - **Password** is the password for the database user.
   - **UserID** is the user ID for the database. It is recommended that you use the sa login and password.
   - **Catalog** is the name of the database. This name can be any name you chose.
   - **DataSource** is the name or IP address of the server where the database is located.

4. **Save** your changes. No error message will be thrown for incorrect entries.

To test your entries, try accessing the application. If you cannot access the application, please re-check your entries.

CONFIGURING OIDC

Open an Internet Explorer web browser either remotely on the local OIDC web server and browse to the following location, replacing SERVERNAME with the actual server name:

http://SERVERNAME/OIDCE/

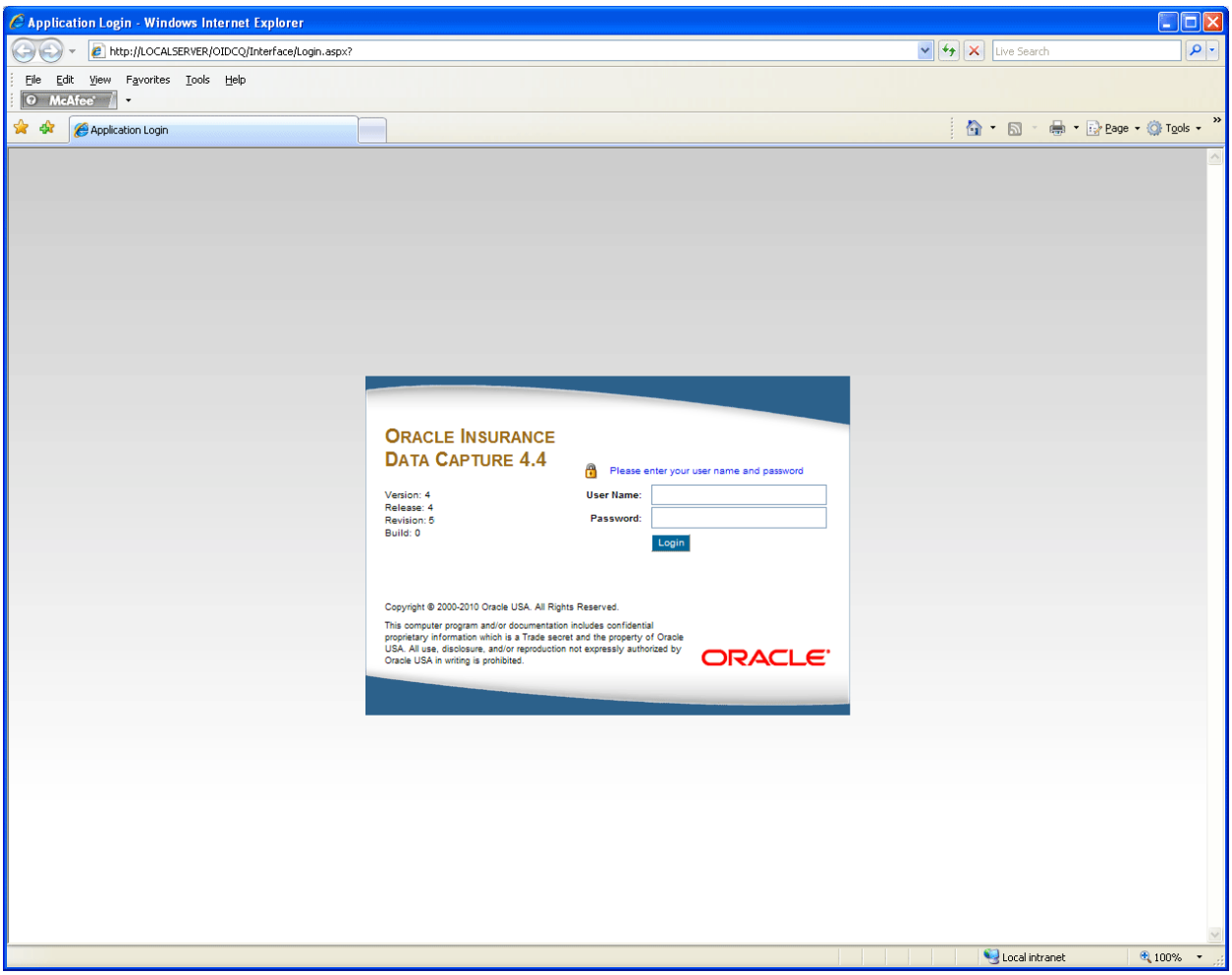


Figure 46 OIDC Home

Default user login is sysadmin with a password of password.

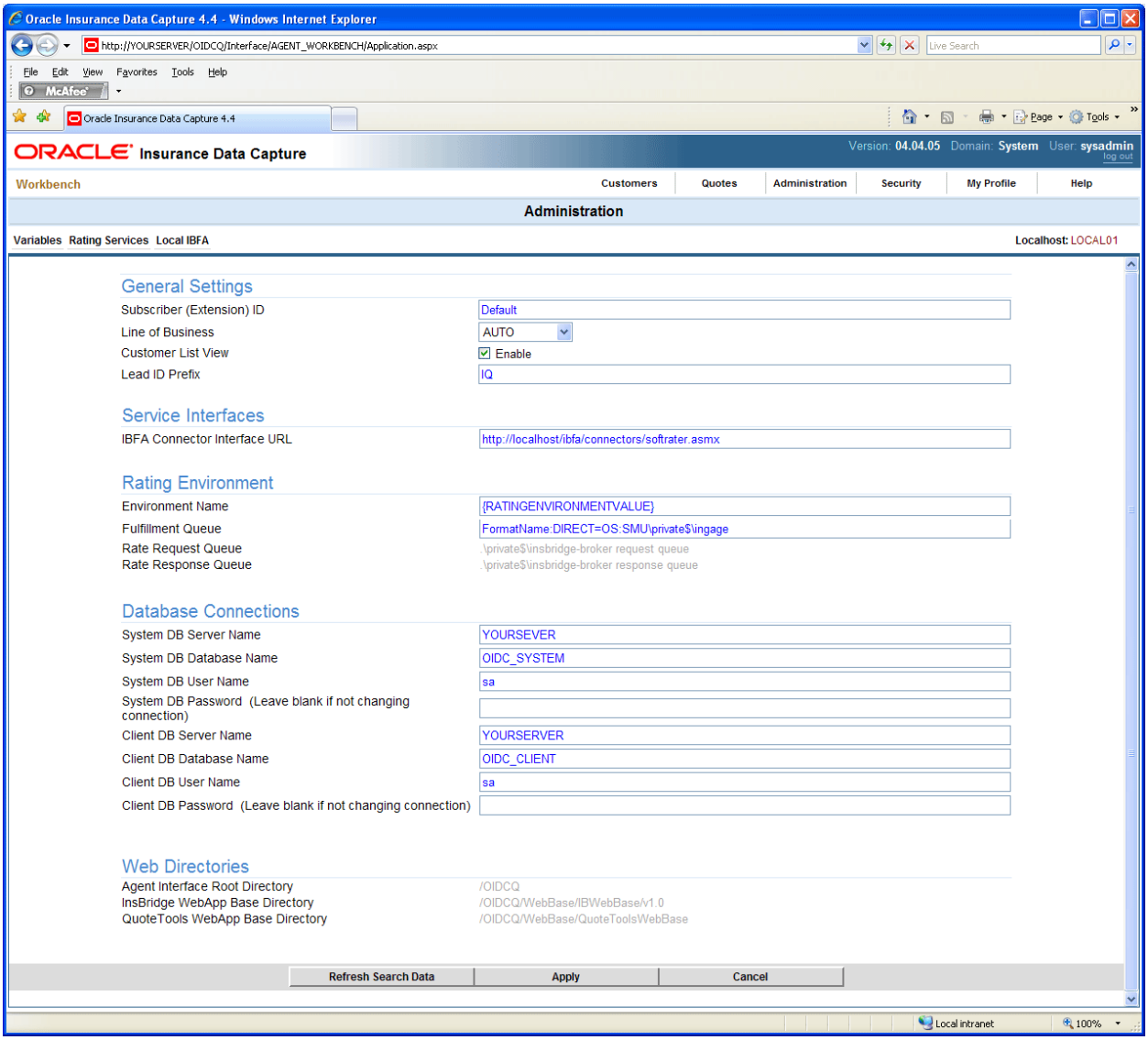


Figure 47 OIDC Admin

After you enter the application, click the Administration link.

Verify that the information on the Administration page is the correct information. If not, please make any adjustments and click **Apply**.

Updating SysAdmin Password

To update the SysAdmin password, click on the **My Profile** link. The SysAdmin information will be displayed. Update your password and Save.

Please change the default sysadmin password or go to security and create your own user login and password.

Chapter 7

UPGRADE INSTALLATION

To update an existing OIDC application you will need these files from E-Delivery:

- OIDC_445_Database.zip
    - DBUpdaterInstall.msi
    - DBUpdateScripts.zip
- OIDC_445_Palette.zip
- OIDC_445_Engine.zip

Upgrading to 4.4.5 from 4.2.0, 4.2.1, or 4.3

The first step when updating the OIDC application is to remove the previous database updater using the Add/Remove programs. Then run the database updates. The database installation program requires the installer have administrator rights on the machine where the databases are located. SQL Server Management Studio must also be installed.

NOTE	It is recommended that you make a copy of the current databases before you make any changes. In the event you need to do a rollback, you will have a working copy to restore.

1. On the server where OIDC is installed, **Start → Control Panel → Add or Remove Programs**.
2. Locate the **OIDC DBUpdater** and remove the program. If you want, you can delete the previous updater file out of Program Files. The location will be the initial installation path, for example C:\Program Files\Oracle\OIDC DBUpdater.
3. Make a backup copy of the web.config from the server where Questionnaire and Designer originally were installed. Follow the local path to the location of Questionnaire. The local path will default to the initial installation path or a path selected by the installer. Two common paths are:

   C:\Program Files\Oracle\IGBU\DataCapture\Questionnaire

   C:\Program Files\InsBridge\Webs\OIDC\iQuestionnaire

   This file will need to be restored at the end of the upgrade.
4. Prior to running the database updates, please have the following information ready:
    - Database server name or URL
    - Database name
    - Login
    - Password

5. Unzip the OIDC_445_Database.zip. There are two zip files, DBUpdaterScripts.zip and OIDC_445_Database.zip and a DBUpdaterInstall.msi file. The OIDC_445_Database.zip will not be needed for an upgrade.

6. Unzip the DBUpdaterScripts.zip to a location that you can access. This file will be used to update the databases on the SQL Server machine. Make note of the location. You will need this information later on.

7. Run the DBUpdaterInstall.msi. It is recommended that you run this installation on the same machine as OIDC however, you can run this installation on any machine.

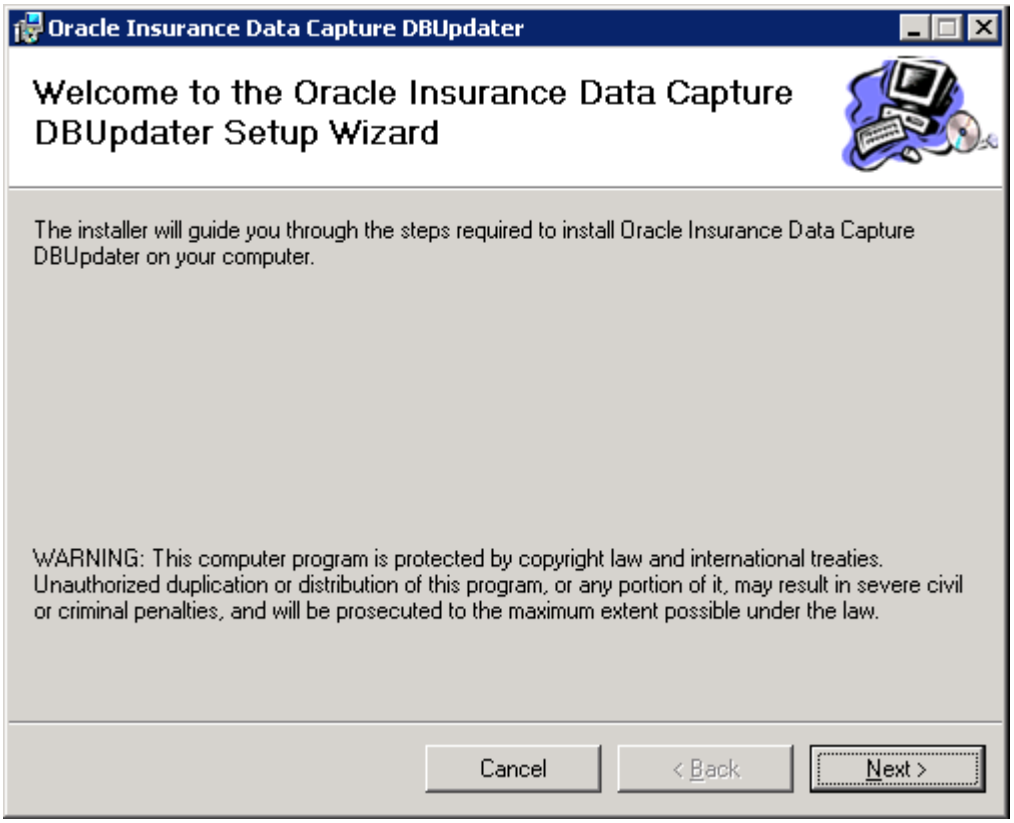


Figure 48 Database Welcome

4. Click **Next** to continue.

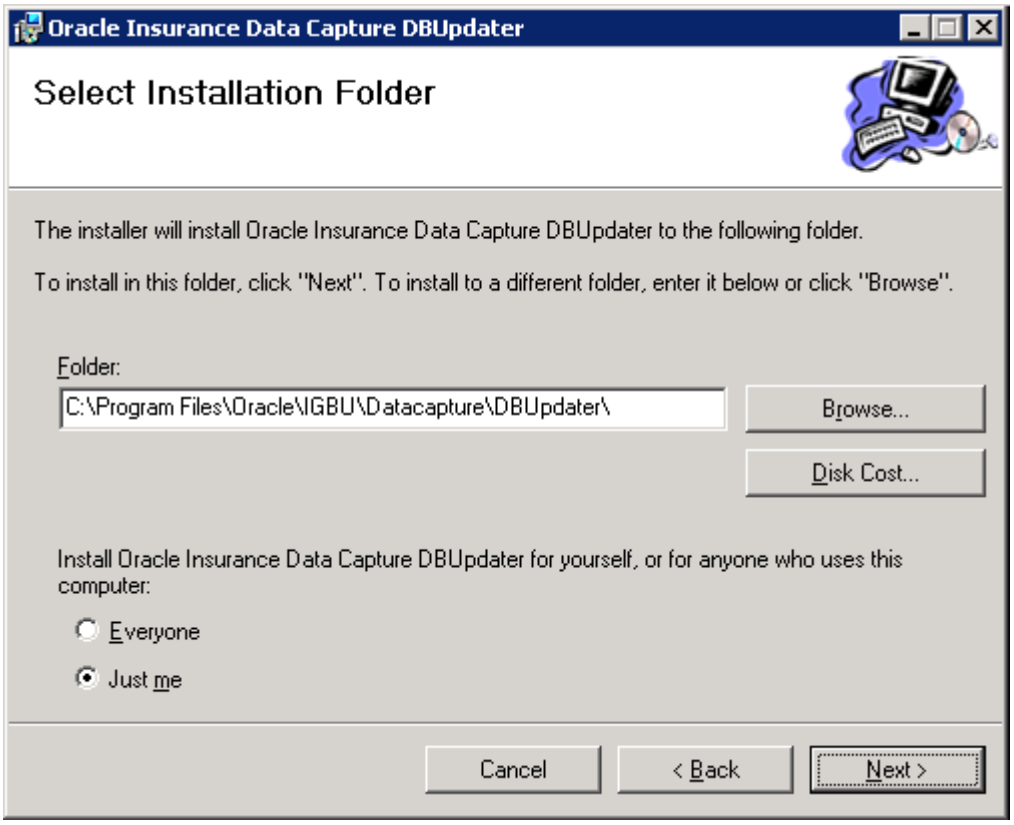
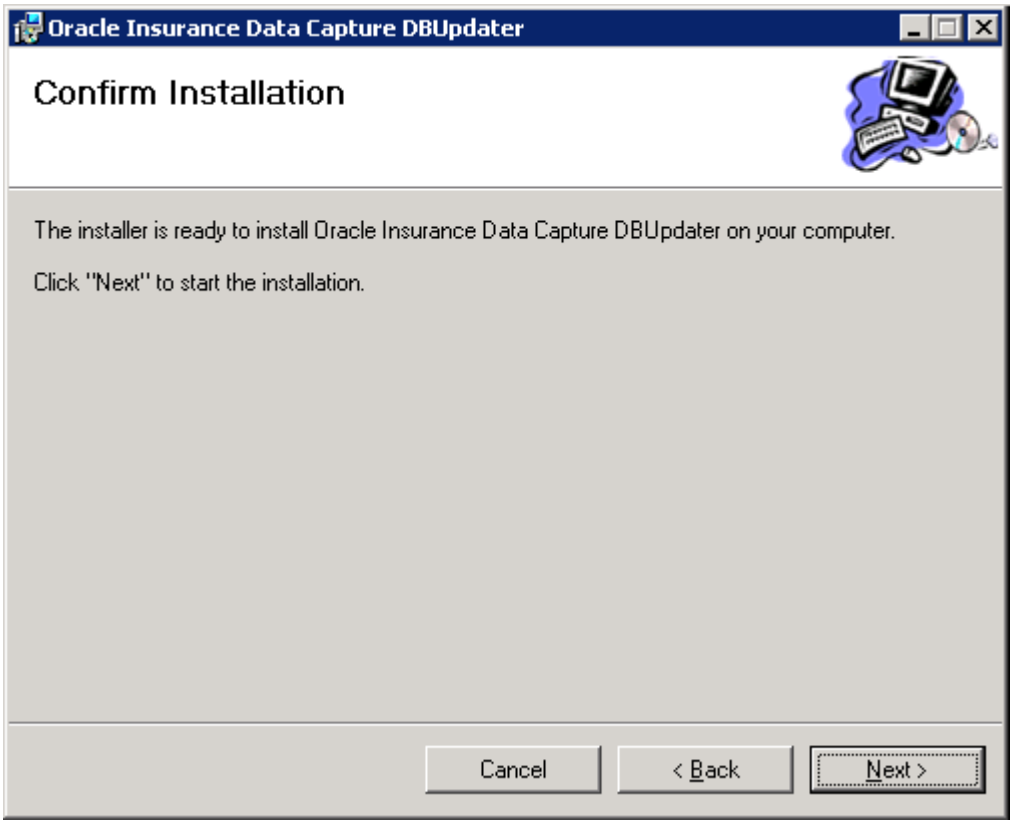


Figure 49 Selecting an Installation Folder

5. You have the option to select another installation directory. If you want another destination directory, browse for the directory you want to use. If the default installation directory is acceptable, Click **Next**. A Confirmation screen will be displayed next.



6. Click **Next** to continue. A progress screen will be displayed.

NOTE	If there are any problems with the database msi, the installer will stop, and an error message will be displayed. The update will not be saved or completed. You will have to correct the error and begin again.

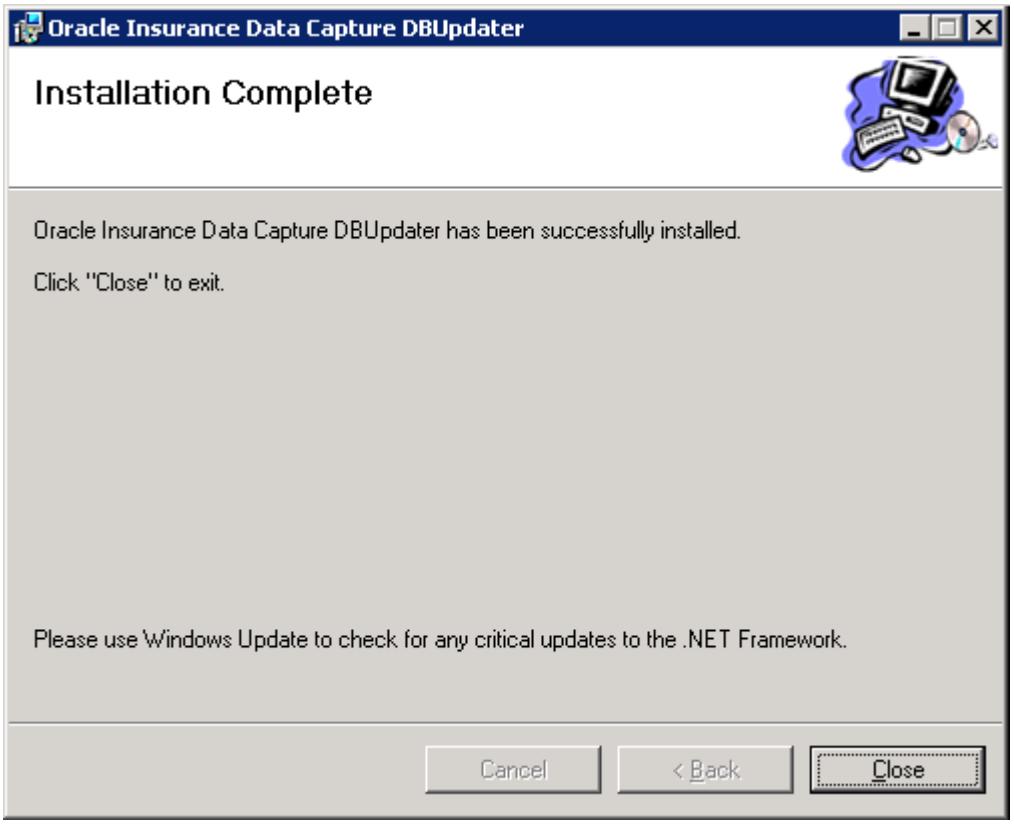


Figure 50 Completed Database Installation

7. When the update is complete, you will receive a success message. Click **Close** to close the installer. A folder should have been created under C:\Program Files\Oracle\IGBU\Datacapture\DBUpdater. This folder contains an executable that will need to be run.

8. Next, enter the C:\Program Files\Oracle\OIDC DBUpdater folder. Run the **DBUpdater.exe**.

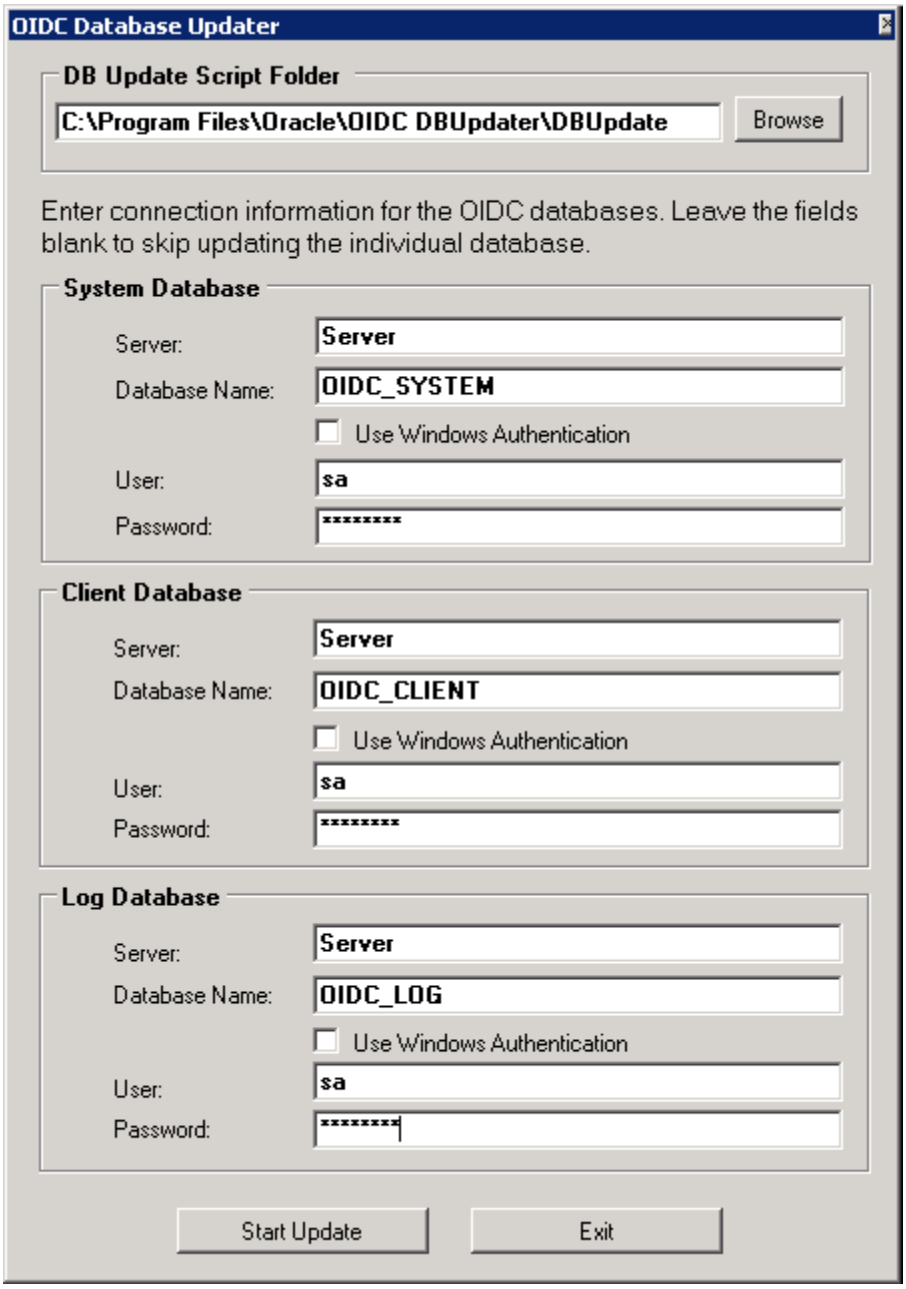


Figure 51 DBUpdater

9. Browse for the location of the DBUpdater file that you unzipped in step 3.
10. Enter in the database information for each database.
11. Click **Start Update**. When the updates are complete you will receive a message.
12. When the update is complete, **Exit** out.

Questionnaire and Designer Updates

Questionnaire and Designer will need to be updated next. For release 4.4.5 , it may be necessary to remove the previous instances of iQuestionnaire and iDesigner.

13. Remove the 4.3, 4.2.0 or 4.2.1 iQuestionnaire. Please see **Removing OIDC**.

14. Remove the 4.3, 4.2.0 or 4.2.1 iDesigner. Please see **Removing OIDC**.

15. Run the new 4.4.5 Engine setup.exe. Please see **OIDC Engine Installation**.

16. Run the new 4.4.5 Palette setup.exe. Please see **OIDC Palette Installation**.

17. The final step is to restore the backup web.config file you created in step 1.

18. Follow the local path to the location of Questionnaire. The local path will default to the initial installation path or a path selected by the installer. Two common paths are:

    C:\Program Files\Oracle\IGBU\DataCapture\Questionnaire

    C:\Program Files\InsBridge\Webs\OIDC\iQuestionnaire

19. Replace the existing web.config file with the one you created in step 1.

20. Enter the Engine (Questionnaire) application, click the Administration link. Verify that the information on the Administration page is the correct information. If not, please make any adjustments and click **Apply**.

The system is ready to use.

REMOVING OIDC

OIDC can be removed at any time. If you remove the Engine or Palette files, be aware that other users will not be able to access the application. The process is the same for both Engine and Palette.

Each file must be removed or repaired separately. If you only want to remove Engine, you can do that. Any file that you remove will have to be re-installed.

1. To remove or repair OIDC, click the **Setup.exe** of the program you want to remove or repair. A Repair or Remove screen will be displayed for the desired program. If there is not enough room on the hard drive, the installation will close down. In that case, you must go to the Add/Remove programs on Control Panel.

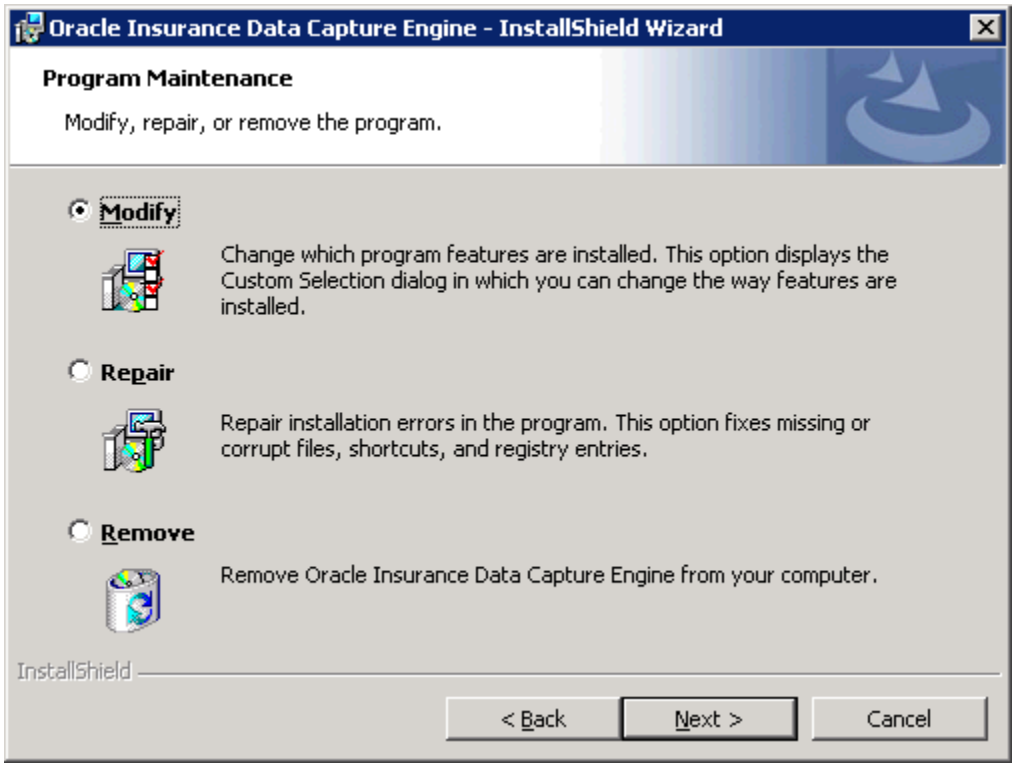
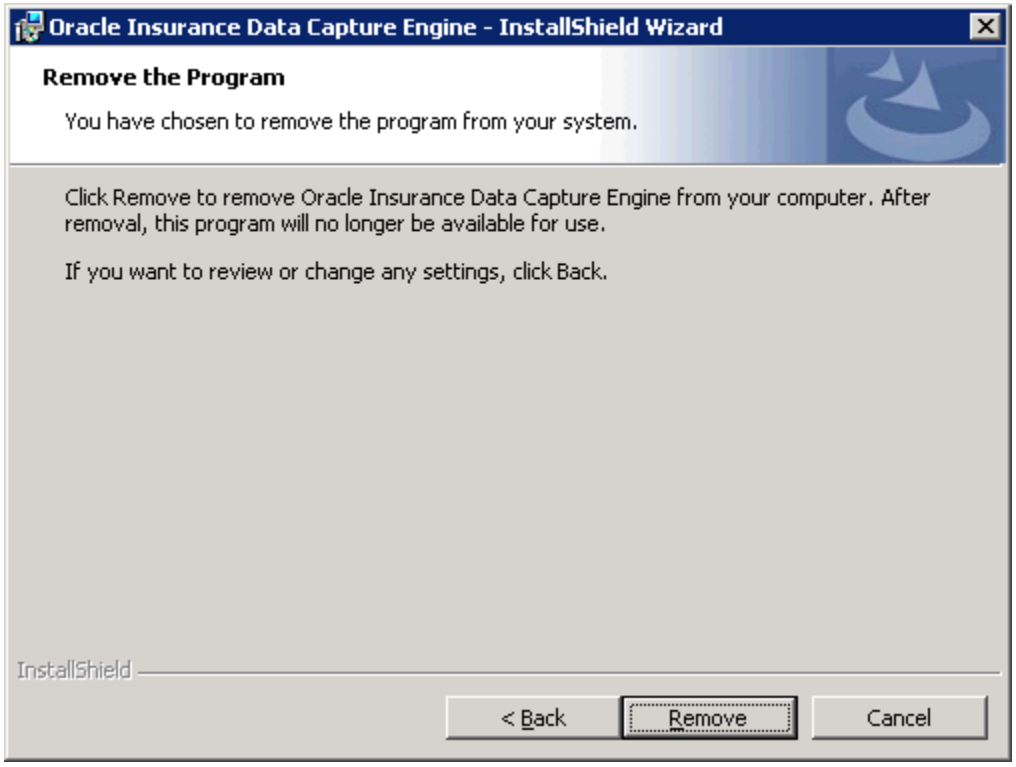


Figure 52 Removing/Repairing OIDC

2. Choose the option you need.
   a. Modify will re-load the application.
   b. **Repair** will re-load the application.
   c. **Remove** will remove the application.
3. If you are removing the file, select **Remove**.
4. Click **Next**.



5. NO warning message will be displayed. The removal begins immediately. The status will be displayed as it progresses.

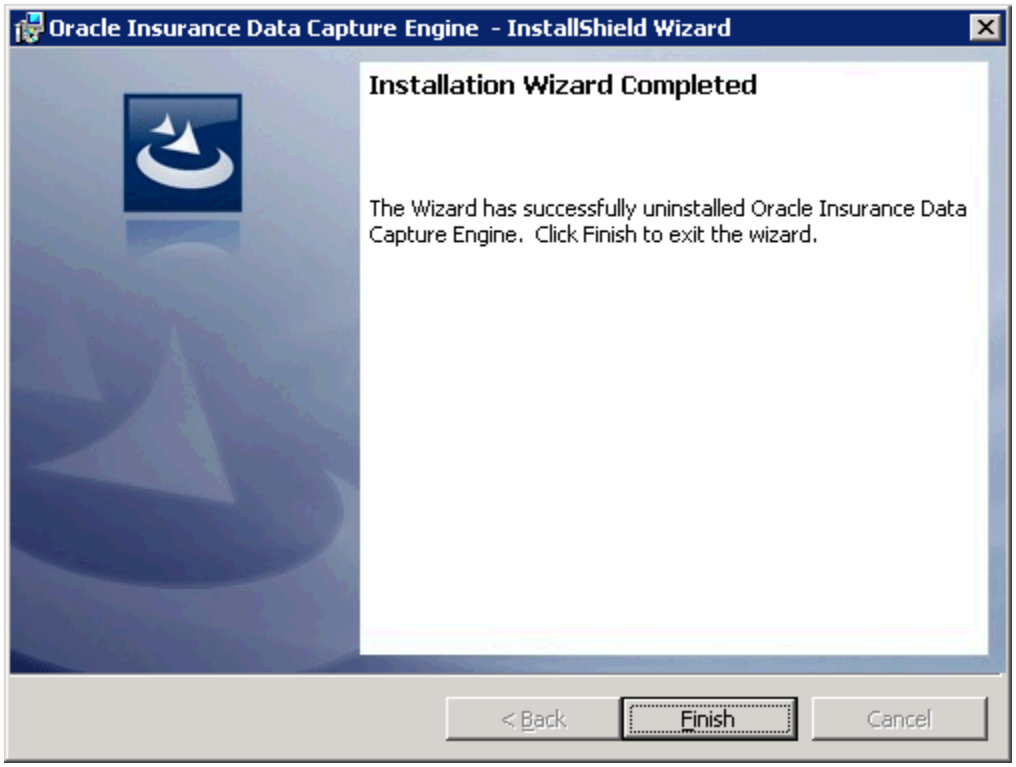


Figure 53 Remove Complete

6. When the program has been removed, a completion screen will be displayed. Click **Finish**.

   The program will be removed. You may need to clear the temp files by running a Disk Cleanup program.

Removing OIDC Databases

Removing the OIDC database scripts from the directory created during the last installation. (i.e. C:\Program Files\OIDC\4.2.1\Database) will not remove the databases from SQL Server. Removing the previous database scripts will reduce the chance of an incorrect database script being run.

To Remove Database Scripts

To remove the database scripts, proceed to the location of the database scripts, for example, C:\Program Files\OIDC\4.2.1\Database and delete the files. The files will be removed to the Recycle Bin on your machine.

To Remove Databases from SQL Server

Please consult your MS SQL Sever guide for the recommended method of removing OIDC databases from your SQL Server.

SUPPORT

If you need assistance with an Oracle Insurance Data Capture, please log a Service Request using My Oracle Support at https://support.oracle.com/.

Address any additional inquiries to:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
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Index

A

Active Server Pages
  Enabling, 9
Alias
  Virtual Directory, 40
Application Pool
  ID, 36
  Properties, 37
  Updating, 35
Application Server
  Subcomponents, 8
ASP.NET v4.0
  Enabling, 9
ASPNET Extensions
  Microsoft .NET 4.0 Framework, 11

C

Catalog
  Connection String, 52
Checklist
  OIDC Installation, 7
Collation and Sort Order
  SQL Server, 21
Compression
  IIS Settings, 49
Configuration
  Server, 35
Configuring
  OIDC, 54
Connection String
  Catalog, 52
  DataSource, 52
  Editing in Web config file, 52
  Passsword, 52
  UserID, 52

D

Database
  Installation, 23
  Location of DBUpdater, 60
  Restore, 23
  Server, MDAC, 10
  Updates, 56
DataSource
  Connection String, 52
DBUpdater Executable, 57
Default
  Password, 54
Directory
  Engine Location, 25, 30
  Palette Location, 25, 30
DTC Access, 14

E

E-Delivery
  IBRU, 15
  OIDC, vi
  Required Programs, vi
Editing
  Connection String Web config file, 52
Edition Notice, 2
Engine
  Installing, 25
  Location, 25, 30
  Setup.exe, 25
  Successful Install, 29
Extensions
  ASPNET, 11

F

Failure
  Installation, 59

H

http://SERVERNAME/OIDCE/, 54

I

IBRU, 15
  E-Delivery, 15
  Installing .NET 4.0 Framework Prior, 11
IBRU_INSTALL_DIR, 17
ID
  Application Pool, 36
IIS
  Enabling, 9
  Installing Microsoft .NET 4.0 Framework After, 11
  Required, 8
IIS Settings
  Compressions, 49
Insbridge Framework Administrator
  Installed, 22
  Overview, 15
Installation
  Insbridge Framework Administrator, 22
  Starting, 17
Installation Checklist, 7

Installation Failure, 59
Installation Files, 22
Installation Order, 22
Installation Program
  Requirements, 15
Installer
  Admin Rights for Installation, 15, 23, 56
Installing
  Engine, 25
  Microsoft .NET 4.0 Framework, 11
  Palette, 30

L

Login
  Default, 54

M

Microsoft .NET 4.0 Framework, 11
Microsoft Message Queuing Service, 10
Microsoft SQL Server, 21
MSDTC, 12
  Security, 14
  Tab, 13

O

OIDC
  Configuring, 54
  E-Delivery, vi
  Removing, 63
  Repair, 63
OIDC_DBUpdaterInstall.msi, 57
OIDC_Engine.msi, 25
OIDC_Log.bak, 23
OIDC_System.bak, 23
Overview
  Insbridge Framework Administrator, 15

P

Palette
  Installing, 30
  Location, 25, 30
  Setup.exe, 30
Part Numbers
  E-Delivery, vi
Password
  Connection String, 52
PDF Reader
  E-Delivery, vi
Permissions
  Virtual Directory, 41
Properties
  Application Pool, 37

R

Removing
  OIDC, 63
Repair
  OIDC, 63
Requirements
  Engine, 25
  Installation Program, 15, 23
  Installing Palette, 30
  Internet Information Services, 8
  Microsoft Message Queuing Service, 10
  Windows Server, 8
Restore
  OIDC Databases, 23

S

Security Configuration, 14
Server
  Configuration, 35
Server Authentication
  SQL Server, 21
SERVERNAME
  Replacing, 54
Servers
  OIDC Split Over, 10
Settings
  MSDTC, 13
SMTP Service
  IIS Requirement, 8
SQL Server
  Authentication, 21
  Collation and Sort Order, 21
  Requirements, 21
  Residing on Separate Host, 21
SysAdmin
  Default Login, 54

U

Unzip Utility
  E-Delivery, vi
Updating
  Application Pool, 35
  Virtual Directory, 38
UserID
  Connection String, 52

V

Virtual Directory
  Permissions, 41
  Updating, 38
Virtual Directoy
  Alias, 40

W

Web config file
  Editing Connection String, 52
Web Server
  MDAC, 10
Windows Server
  Components, 8