

# Oracle Insurance Agent Desktop Installation Guide

Version 8.0

September 2008

*Oracle Insurance Agent Desktop Installation Guide*

*Version 8.0*

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# Introduction

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Welcome to the *Oracle Insurance Agent Desktop Installation Guide*. Oracle Insurance Agent Desktop (Agent Desktop) is a browser-based application that allows agents to view their case data based on Oracle Insurance General Agent (OIGA) data.

The document covers the steps needed to configure the database, the web application and the initial load processes for the Agent Desktop application.

## Audience

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This guide is intended for technical personal, including system administrators, installers, database administrators and others who are involved in the development, maintenance and deployment of the Agent Desktop application and associated databases.

## E-Delivery

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Agent Desktop is contained within the Oracle Insurance General Agent (OIGA) download. The OIGA download can be obtained from the Oracle E-Delivery system. Downloaded files are zipped. Prior to installation, please make sure the source machine(s) where Agent Desktop 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 Agent Desktop 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. For example, the OIGA v 8.0 file is part # 15455-01 and file name V15455-01. This information may be required if you need to contact Oracle Insurance Support.

After downloading OIGA v 8.0, to install Agent Desktop, you will only need the Agent Desktop folder. This folder contains:

- **Agent Desktop Distribution** – The application file
- **Documentation** – The associated documentation for Agent Desktop
- **Setup Files** – Setup files for Agent Desktop
- **SQL Scripts** – The SQL scripts for Agent Desktop

## Manual History

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New editions incorporate any updates issued since the previous edition.

<b>Edition</b>	<b>Publication Number</b>	<b>Product Version</b>	<b>Publication Date</b>	<b>Comment</b>
1 <sup>st</sup> Edition	P01-322-01	V 1.0	September 2008	Initial Creation
2 <sup>nd</sup> Edition	P01-322-02	V 1.0	February 2009	Update

# Prerequisites

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For Agent Desktop to run successfully, there are some hardware and software requirements that must be met.

## System Requirements

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System requirements for server and clients can be found in the Oracle Insurance General Agent Hardware and Software Requirements Guide. This guide can be obtained from Oracle Insurance Sales or Support.

Recommened operating environment and database software:

- MS Windows 2003 Server SP2 is recommend.
- MS SQL Server 2005 is recommended when the database and application are on the same machine. MS SQL Server 2000 can be used when the database is not on the same machine as the application.

If Agent Desktop logo customization is needed, then a logo image that meets the establised guidelines will be required. Please see [Agent Desktop Logo Customization](#) for more information.

## Agent Desktop Required Software

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There are some required application installers for Agent Desktop that are not included in the Agent Desktop Installation Download. These required applications installers are:

- Sun Microsystems Inc. Java SDK 1.4.2 (j2sdk-1\_4\_2\_02-windows-i586-p.exe)
- Apache Software Jakarta Tomcat 5.0.18 (jakarta-tomcat-5.0.18.exe)
- Downloaded files are zipped, an unzip program will be required.
- For production servers only, a Digital Certificate will be required.

**NOTE**

Installing Apache Software Tomcat uses port 80 on the installation machine. Please check the usage of this port before the installation.

It is necessary to have access to these application installers before the Agent Desktop installation process.

## Agent Desktop Download Content

The Agent Desktop download should contain:

File	Location
Agent Desktop Jar File idestop_agent<version >.jar	\Agent Desktop Distribution
SQL Scripts Directory fn_ga_retrieveUserHierarchyForAgentRefNo.sql fn_ga_retrieveUserPersonal InfoForAgentRefNo.sql fn_top_code_id.sql idt_database_int.sql	\SQL Scripts
Setup Files convert_ga_agents_to_users.bat customize_logo.bat	\Setup Files
Documentation Agent Desktop Installation Guide Agent Desktop User Documentation	\Documentation

### 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.

# Database Configuration

For the Agent Desktop application to function properly, a special **IDESKTOP** database needs to be created. Usually it will be located on the same SQL Server where the GA database is located. Some additional User Defined Functions and Logins will need to be created in the GA database as well.

## IDESKTOP and GA Database Setup on MS SQL Server

Begin by setting up the IDESKTOP database:

1. Open SQL Query Analyzer and log in to the SQL Server where you want to keep the IDESKTOP database as a super admin user.

**NOTE** sa is the default super admin user for an SQL Server installation.

2. Create the IDESKTOP database on SQL Server.

Run the following script. Replace the **<Agency\_IDESKTOP>** text with the desired name of your IDESKTOP database, and the full pathname where the data and log files will be created.

SQL Script	Example
CREATE DATABASE <Agency_IDESKTOP> ON	CREATE DATABASE TEST_IDESKTOP ON
( NAME = <Agency_IDESKTOP>_data,	( NAME = test_IDESKTOP_data,
FILENAME =	FILENAME =
'pathname\<Agency_IDESKTOP>_data.mdf',	'D:\IDESKTOP\TEST_IDESKTOP_data.mdf',
SIZE = 10MB,	SIZE = 10MB,
FILEGROWTH = 10% )	FILEGROWTH = 10% )
LOG ON	LOG ON
( NAME = '<Agency_IDESKTOP>_log',	( NAME = ' TEST_IDESKTOP_log',
FILENAME =	FILENAME =
'pathname\<Agency_IDESKTOP>_log.ldf',	'D:\IDESKTOP\TEST_IDESKTOP_log.ldf',
SIZE = 5MB,	SIZE = 5MB,
FILEGROWTH = 10% )	FILEGROWTH = 10% )
GO	GO
Use <Agency_IDESKTOP>	Use TEST_IDESKTOP
GO	GO

**NOTE** The pathname usually is located in SQL Server database data files directory.



3. Make sure you are connected to the IDESKTOP database Run the **idt\_database\_init.sql** script found in the SQL Scripts folder of the download. This script will create tables in **IDESKTOP** database.

After this script is executed, the following tables should be created:

- GLOBALS
- IIT\_PROFILE\_EXT
- QV\_FOLLOWUPS\_DATA
- RULES
- RULE\_IN\_ATTRS
- RULE\_TYPES
- DOC\_CONTENTS
- DOC\_REQUESTED\_LOG
- DOC\_HEADERS
- IIT\_NIPR\_LOG
- IDT\_ADIR\_AGENCY\_INFO
- IDT\_ADIR\_AGENT\_GA\_SETUP
- IDT\_ADIR\_COMPANY\_AGENT\_INFO
- IDT\_ADIR\_PIV\_CARRIER\_INFO
- IDT\_ADIR\_PORTAL\_USER\_INFO

4. Run the following script to create the **ad\_rwuser** SQL login that will be used by the Agent Desktop application:

```
Use MASTER
EXEC sp_addlogin 'ad_rwuser', 'readerwriter', 'Agency_IDESKTOP'
-- where Agency_IDESKTOP is actual name of IDESKTOP db --
```

5. Run the following script to create the **ad\_rwuser** user specific to the Agent Desktop application:

```
Use Agency_IDESKTOP
EXEC sp_adduser ad_rwuser, ad_rwuser, db_datareader
EXEC sp_addrolemember 'db_datawriter', 'ad_rwuser'
-- where Agency_IDESKTOP is actual name of IDESKTOP db --
```

6. If the GA database resides on the same SQL Server as IDESKTOP database – skip this step. Otherwise:

- a) Log out of the IDESKTOP database SQL Server.
- b) Log in to SQL Server where the GA database resides as a super admin user.
- c) Run the following script to create the **ad\_rwuser** and set GA as the default database:

```
Use MASTER
EXEC sp_addlogin 'ad_rwuser', 'readerwriter', 'Agency_GA'
-- where Agency_GA is actual name of GA db --
```

7. Run the following script to create the corresponding **ad\_rwuser** user on the GA database and grant the user access:

```
Use Agency_GA -- where Agency_GA is actual name of GA db --
EXEC sp_adduser ad_rwuser, ad_rwuser, db_datareader
EXEC sp_addrolemember 'db_datawriter', 'ad_rwuser'
```

8. Run the **fn\_top\_code\_id.sql** script found in the SQL Scripts folder of the download. This script creates a User Defined Function in the GA database called **fn\_top\_code\_id**. This script also grants **EXECUTE** permission to login **ad\_rwuser**.

**NOTE**

*Make sure you are connected to GA database while running the script.*

9. Run the **fn\_ga\_retrieveUserHierarchyForAgentRefNo.sql** script found in the SQL Scripts folder of the download. This script creates a User Defined Function in the GA database called **fn\_ga\_retrieveUserHierarchyForAgentRefNo**. This script also grants **SELECT** permission to login **ad\_rwuser**.

**NOTE**

*Make sure you are connected to GA database while running the script.*

10. Run the **fn\_ga\_retrieveUserPersonalInfoForAgentRefNo.sql** script found in the SQL Scripts folder of the download. This script creates a User Defined Function in the GA database called **fn\_ga\_retrieveUserPersonalInfoForAgentRefNo**. This script also grants **SELECT** permission to login **ad\_rwuser**.

**NOTE**

*Make sure you are connected to GA database while running the script.*

# Web Server Installation and Configuration

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In order to run the Agent Desktop application, Sun Microsystems Java SDK (Java SDK) and Apache Tomcat (Tomcat) Servlet Container must be installed. These products are not part of the Agent Desktop installation package. The exact versions are listed below. Please download these files before continuing.

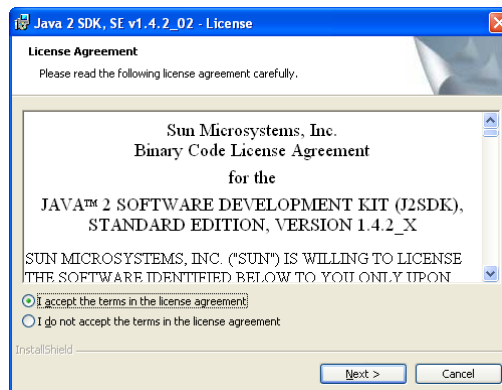
It is necessary to create an Agent Desktop Installation Directory to store these components. This guide will use **C:\AgentDesktop** as the Agent Desktop Installation Directory. If this directory does not exist, you must create it.

The installation and configuration requirements of Java SDK and Apache Tomcat for use in Agent Desktop is explained below.

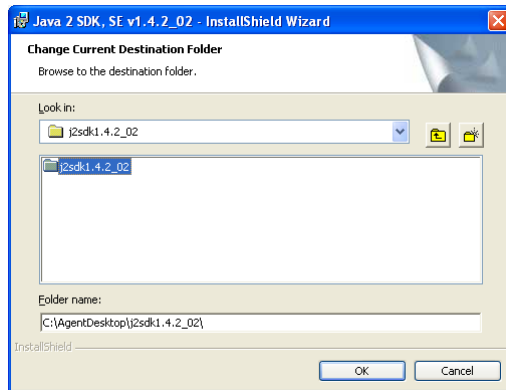
## Installing Java SDK

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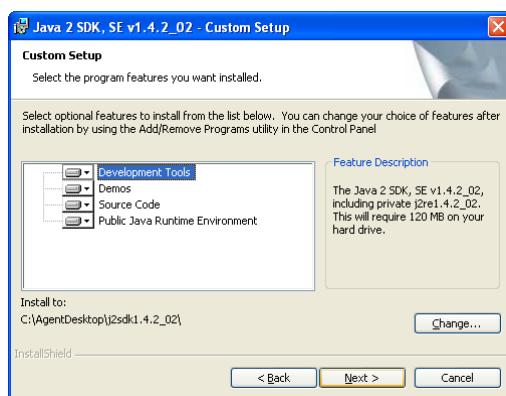
1. Run **j2sdk-1\_4\_2\_02-windows-i586-p.exe** starting the Java 2 SDK SE v1.4.2\_02 Installation Setup. Accept the License Agreement and click 'Next >'



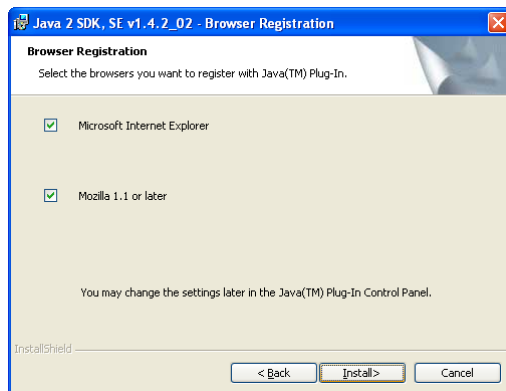
2. Click on 'Change...' to change the current destination directory. Use **C:\AgentDesktop\j2sdk1.4.2\_02\** as the Folder name.



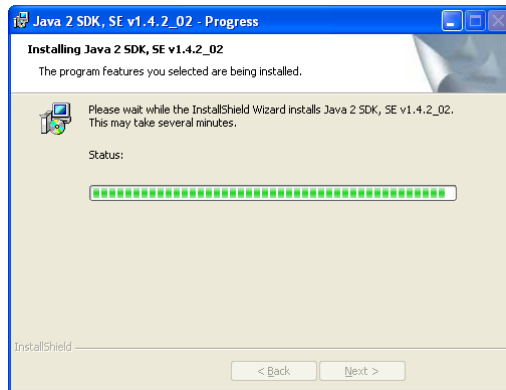
3. Click 'Next >'.



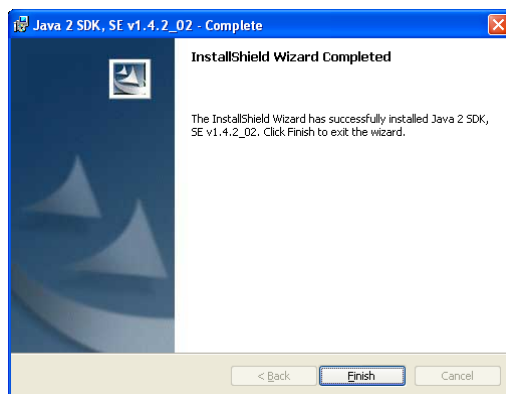
4. Click 'Install >'.



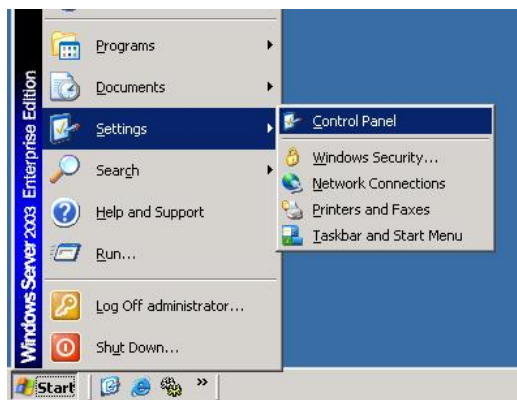
5. Wait until the installation process finishes.



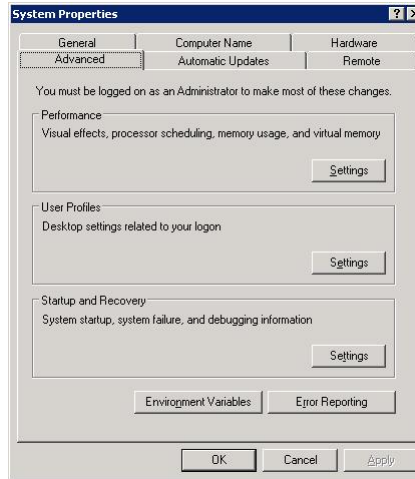
6. Click 'Finish' when the installation is completed.



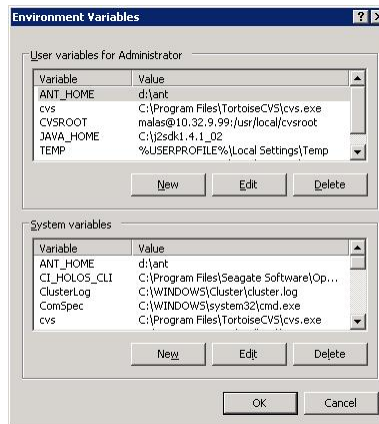
7. After the installation is completed, an environment variable named **JAVA\_HOME** will need to be created for the Java Installation Directory. Access **Start > Settings > Control Panel** and open the **System Properties** window.



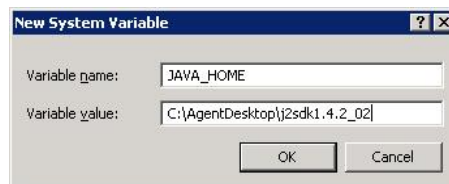
- Click on the 'Advanced' tab. Next, click the 'Environment Variables' button at the bottom of the window.



- Click on 'New' in the bottom portion of the window, under System Variables.



- A New System Variable window should appear where you have to specify the **Variable name** and the **Variable value**.



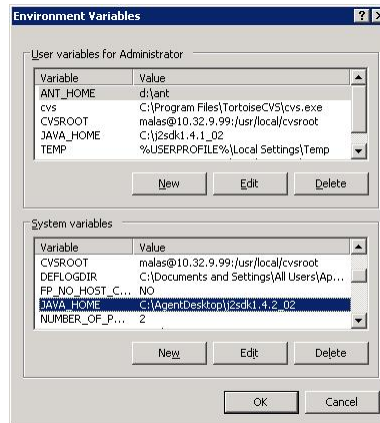
Enter these values:

**Variable name:** JAVA\_HOME

**Variable value:** C:\AgentDesktop\j2sdk1.4.2\_02

Then click 'OK'.

11. To save the new **JAVA\_HOME** variable you will have to click 'OK' on the Environment Variables window.

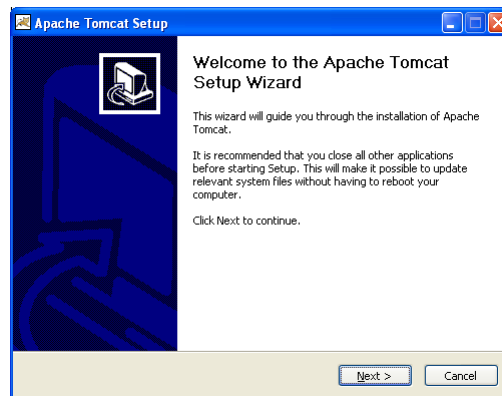


12. Click **OK** again to close the System window.

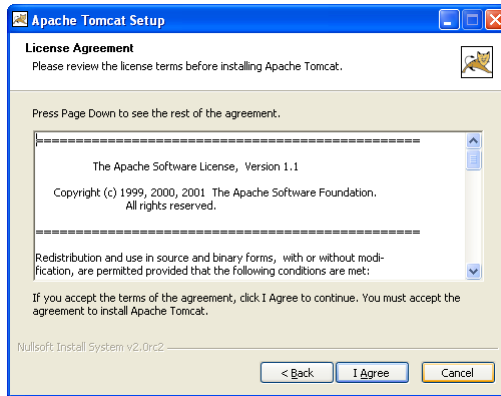
## Installing Apache Tomcat

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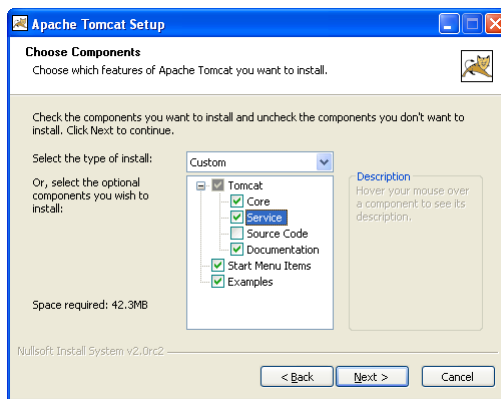
1. Run **jakarta-tomcat-5.0.18.exe** to start the Apache Tomcat Setup Wizard.



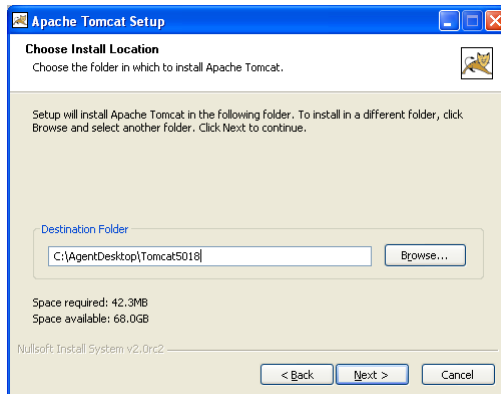
2. Click 'Next >'.



3. Expand the Tomcat option and select Core, Service and Documentation items. Click 'Next >’.

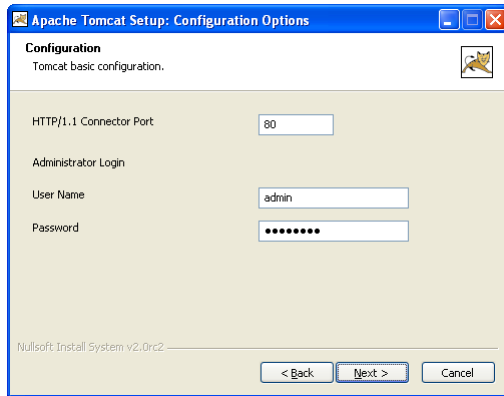


4. Change the Destination Folder to 'C:\AgentDesktop\Tomcat5018' and then click 'Next >’.

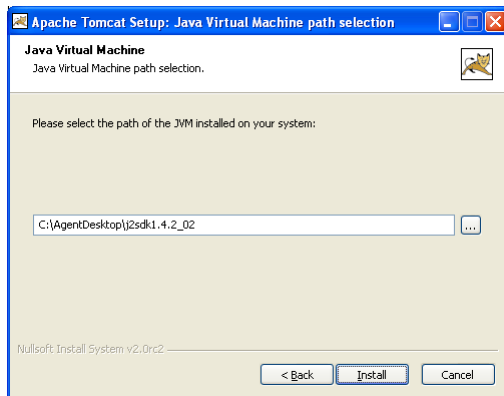


5. Change the HTTP/1.1 Connector Port to 80 and choose a security password for the admin user. Click 'Next >’.

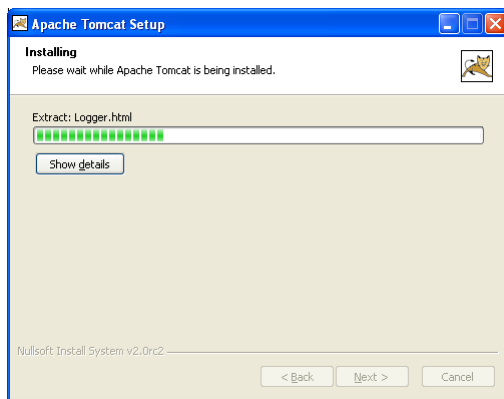




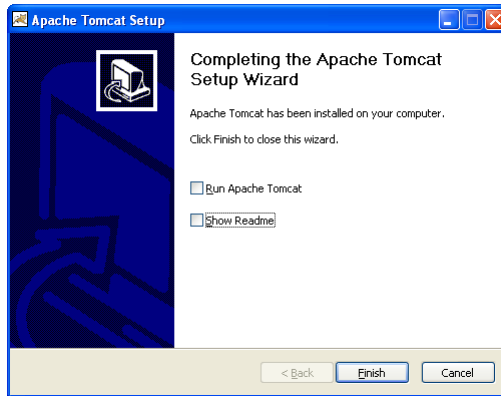
6. Select the path of the Java SDK directory and then click 'Install'. If **JAVA\_HOME** system variable is correctly configured then this directory should be **C:\AgentDesktop\j2sdk1.4.2\_02**.



7. Wait until the installation process finishes.



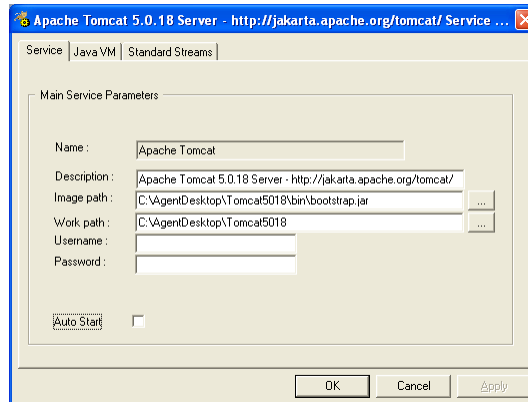
8. When the installation is completed uncheck the 'Run Apache Tomcat' and 'Show Readme' options and click 'Finish'.



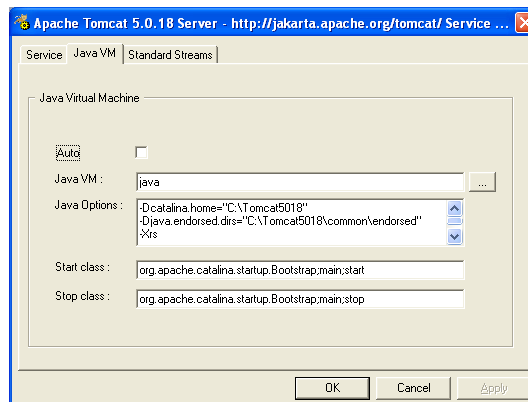
## JVM Options Configuration for Apache Tomcat

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1. After the Apache Tomcat installation is done, you will have to setup JVM (Java Virtual Machine) options in order to allocate additional memory. Go to **Start > Programs > Apache Tomcat 5.0 > Configure Tomcat**.

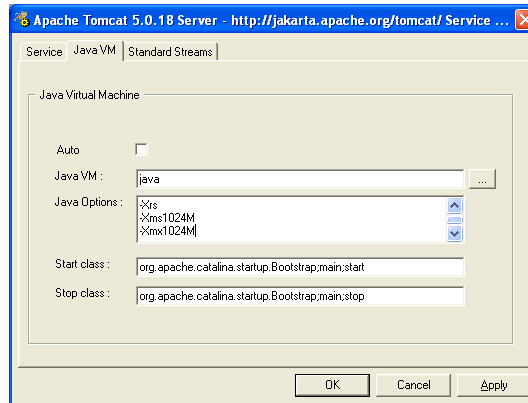


2. Click on the Java VM tab.



Then, append to the Java Options these values:

**-Xms1024M**  
**-Xmx1024M**



After that click 'Apply' and then 'OK'.

#### **NOTE**

This is the recommended amount of memory reserved for Tomcat. If the server doesn't have enough memory you can reserve only 512Mb (-Xms512M -Xmx512M).

## **Apache Tomcat Library and Files Configuration**

### **Update Apache Tomcat endorsed and lib folders**

1. Rename C:\AgentDesktop\Tomcat5018\common\endorsed folder into endorsed-orig
2. Rename C:\AgentDesktop\Tomcat5018\common\lib folder into lib-orig
3. Copy the provided \Tomcat5018\common\endorsed folder into C:\Tomcat5018\common folder
4. Copy the provided \Tomcat5018\common\lib folder into C:\Tomcat5018\common folder

### **Update the sever.xml and web.xml files**

1. Rename C:\AgentDesktop\Tomcat5018\conf\server.xml into server-orig.xml
2. Copy the provided \Tomcat5018\conf\server.xml file into C:\Tomcat5018\conf
3. Rename C:\AgentDesktop\Tomcat5018\conf\web.xml into web-orig.xml
4. Copy the provided \Tomcat5018\conf\web.xml file to C:\AgentDesktop\Tomcat5018\conf

#### **NOTE**

The lists of changes for the web.xml file are:

- a) Ports configuration
- b) Agent Desktop context application configuration

### Disable Apache Tomcat's Admin and Manager Applications (if desired)

1. Rename the C:\AgentDesktop\Tomcat5018\conf\Catalina\localhost\admin.xml and C:\AgentDesktop\Tomcat5018\conf\Catalina\localhost\manager.xml to admin.txt and manager.txt.

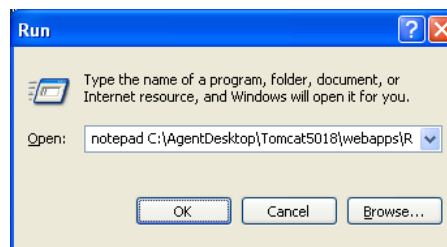
#### NOTE

This is the simplest way of disabling the Tomcat Manager and Admin. During Apache Tomcat startup it looks for the "Processing Context Configuration file" (C:\AgentDesktop\Tomcat5018\conf\Catalina\localhost\admin.xml). If the file does not exist, no error is logged and Tomcat Admin is not enabled.

### Set Default Page for Accessing Tomcat Application Server (if desired)

1. Rename C:\AgentDesktop\Tomcat5018\webapps\ROOT\index.jsp file to index-orig.jsp
2. Copy the provided \Tomcat5018\webapps\ROOT\index.jsp file to C:\AgentDesktop\Tomcat5018\webapps\ROOT\
3. Go to Start > Run and then type the following text:

notepad C:\AgentDesktop\Tomcat5018\webapps\ROOT\index.jsp



Into the Open field, and then click OK.

4. Change the <ServerName> tag with the current Server Name or the IP address

```
<html>
  <head>
    <title>OracleInsurance</title>
  </head>
  <body>
    <script language="javascript">
      location.replace("https://<ServerName>/agent/start");
    </script>
  </body>
</html>
```

#### NOTE

The <ServerName> is the Domain Name, Computer Name or IP address of the machine where the application is being installed.

5. Rename C:\AgentDesktop\Tomcat5018\webapps\ROOT\WEB-INF\web.xml to WEB-web-orig.xml
6. Copy the provided \Tomcat5018\webapps\ROOT\WEB-INF\web.xml file to C:\AgentDesktop\Tomcat5018\webapps\ROOT\WEB-INF

#### NOTE

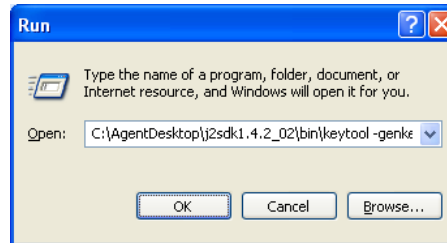
The <servlet> and <servlet-mappings> sections have been deleted.

## SSL Configuration for Intranet Servers

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1. Go to **Start > Run** and type the following text:

**C:\AgentDesktop\j2sdk1.4.2\_02\bin\keytool -genkey -alias tomcat -keyalg RSA**



Then click OK.

2. Enter the following attributes when prompted

**Enter keystore password:** {KEYSTORE\_PASSWORD} i.e. changeit

**First and Last Name:** {FIRST\_LAST\_NAME} i.e. ldesktop

**Name of organizational unit:** {ORG\_UNIT\_NAME} i.e. Oracle Insurance

**Name of organization:** {ORGANIZATION\_NAME} i.e. Oracle

**City or Locality:** {CITY\_LOCALITY} i.e. San Francisco

**State or Province:** {STATE\_PROVINCE} i.e. CA

**Country Code:** {COUNTRY\_CODE} i.e. US

**Is .. correct:** yes

**Enter key password:** press RETURN (means: same as keystore password)

3. A Tomcat keystore file (.keystore) is created in one of the **C:\Documents and Settings\Administrator** or **C:\Documents and Settings\Default User** directories. The same file should exist in both directories. Copy and paste the file from the directory where it exists to the directory where it needs to be.

### NOTE

Sometimes **Default User** directory is hidden, so in order to view this folder, allow viewing hidden files in the windows explorer folder Options.

## SSL Configuration for Production Servers

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A Certification Authority (i.e. [VeriSign Inc.](#)) must provide a certificate file to configure the SSL connection. To install it, you can follow the instructions described on step 2 below, or use step 3 of [SSL Configuration for Intranet Servers](#) section.

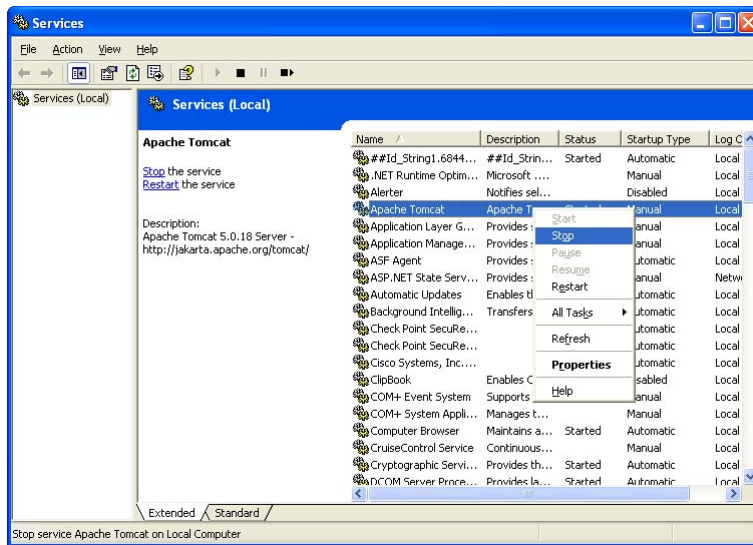
### NOTE

To configure a certificate obtained from one Certification Authority it will be necessary to create a new ".keystore" file or modify the existing java "TrustStore" file importing the certificate obtained from the certification authority. This information is usually provided by the emitting Certification Authority.

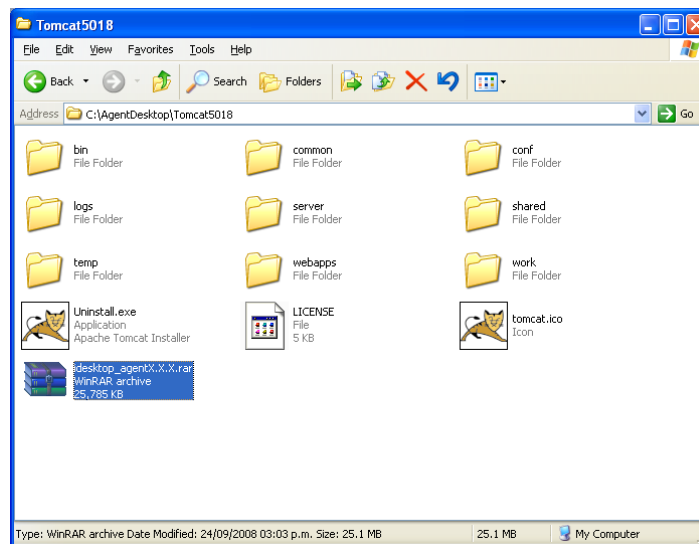
# Application Deployment into the Web Server

After the installation and configuration of all the required applications, the next step is to deploy the Agent Desktop application.

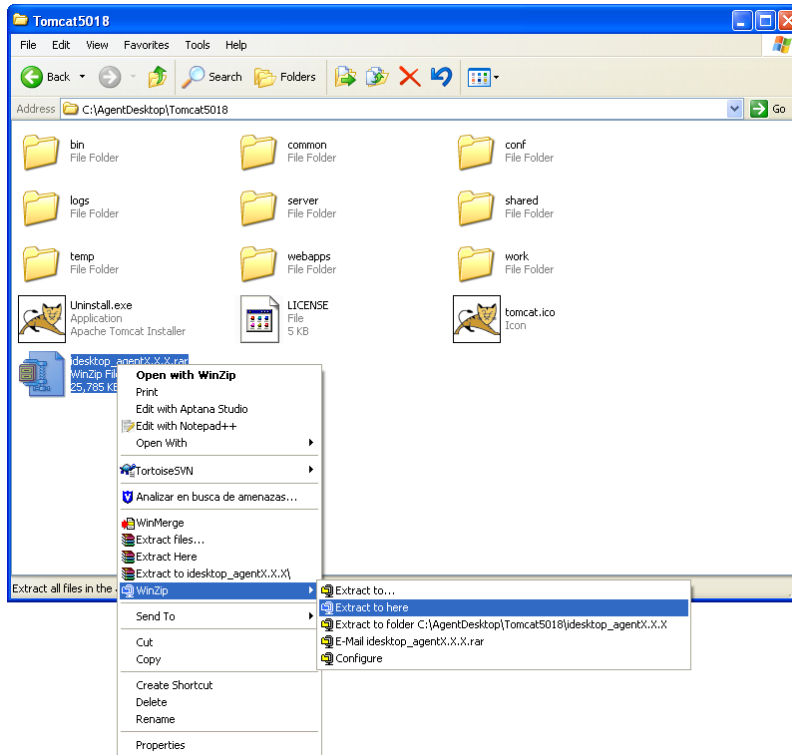
1. Stop the Apache Tomcat Service. Go to **Start > Control Panel > Administrative Tools > Services**. Look for the Apache Tomcat Service and Stop it.



2. Copy the provided `idedesktop_agent_<version_number>.jar` file to `C:\AgentDesktop\Tomcat5018` directory.



- Decompress the jar file by right-clicking it and the selecting 'Extract here' option



- Copy the provided resources folder which contains the help files to C:\AgentDesktop\Tomcat5018\webapps

## Configuration File Modification

The Agent Desktop configuration file will be in C:\AgentDesktop\Tomcat5018\webapps\agent\idt-struts-config.xml. This file contains the URL mappings, defining database connections and constants.

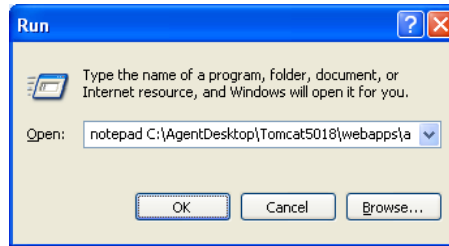
The parameters are defined with the next structure:

```
<message-resources key="APP_OPTIONS:PARAMETER_NAME" parameter="PARAMETER_VALUE" />
```

In order to modify the parameters it is necessary to use the previous structure and replace the **PARAMETER\_NAME** and **PARAMETER\_VALUE** with appropriate values.

Once Agent Desktop is deployed it will be necessary to update some parameters. Go to **Start > Run** and then type:

```
notepad C:\AgentDesktop\Tomcat5018\webapps\agent\idt-struts-config.xml
```



Into the Open field, and then click OK.

The list of parameters to modify is:

1. Change the IDESKTOP Database Username

```
<message-resources key="APP_OPTIONS:DSCONFIG::Username" parameter="
AGENCY_IDESKTOP_USER_NAME"/>
```

2. Change the IDESKTOP Database Username Password

```
<message-resources key="APP_OPTIONS:DSCONFIG::Password" parameter="
AGENCY_IDESKTOP_USER_PWD"/>
```

3. Change IDESKTOP Database URL parameter

```
<message-resources key="APP_OPTIONS:DSCONFIG::Url" parameter="jdbc:JSQlConnect://
AGENCY_IDESKTOP_SERVER_NAME:1433/DatabaseName=
AGENCY_IDESKTOP_DATABASE_NAME/disableStatementPooling=false;"/>
```

4. Change the ACTIVEDIR Database Username

```
<message-resources key="APP_OPTIONS:DSCONFIG:ACTIVEDIR:Username" parameter="
AGENCY_IDESKTOP_USER_NAME"/>
```

5. Change the ACTIVEDIR Database Username Password

```
<message-resources key="APP_OPTIONS:DSCONFIG:ACTIVEDIR:Password" parameter="
AGENCY_IDESKTOP_USER_PWD"/>
```

6. Change the ACTIVEDIR Database URL parameter

```
<message-resources key="APP_OPTIONS:DSCONFIG:ACTIVEDIR:Url"
parameter="jdbc:JSQlConnect:// AGENCY_IDESKTOP_SERVER_NAME:1433/DatabaseName=
AGENCY_IDESKTOP_DATABASE_NAME/disableStatementPooling=false;"/>
```

7. Change the QUICKCASE Database Username

```
<message-resources key="APP_OPTIONS:DSCONFIG:QUICK_CASE:Username"
parameter="AGENCY_GA_USER_NAME"/>
```

8. Change the QUICKCASE Database Username Password

```
<message-resources key="APP_OPTIONS:DSCONFIG:QUICK_CASE:Password"
parameter="AGENCY_GA_USER_PWD"/>
```

9. Change the QUICKCASE Database URL parameter

```
<message-resources key="APP_OPTIONS:DSCONFIG:QUICK_CASE:Url"
parameter="jdbc:JSQlConnect://AGENCY_GA_SERVER_NAME:1433/DatabaseName=
```

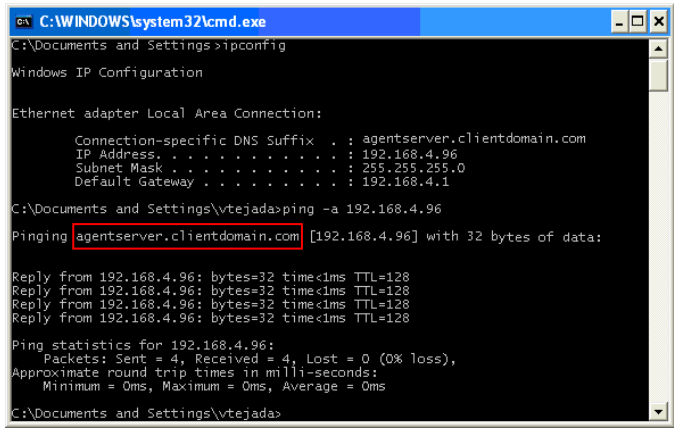


**AGENCY\_GA\_DATABASE\_NAME**/disableStatementPooling=false;"/>

10. Change the Application Homepage URL

<message-resources key="APP\_OPTIONS:AppHomePageUrl" parameter="https://  
**AGENTDESKTOP\_APP\_SERVER**/agent/start"/>

**NOTE** The server name may be obtained by running the **ping -a IP\_ADDRESS** command in the DOS prompt.



11. Change the Help Desk Phone Number

<message-resources key="APP\_OPTIONS:HelpDeskPhone" parameter="**AGENCY\_HELP\_DESK\_PHONE**" />

12. Change the URL for Help Files

<message-resources key="APP\_OPTIONS:HelpUrl" parameter="qc=https://  
**AGENTDESKTOP\_APP\_SERVER**/resources/help/AgentDesktop.htm; " />

13. Change the Super Admin Username

<message-resources key="APP\_OPTIONS:LdapAdminId" parameter="**SUPER\_ADMIN\_USERNAME**" />

**NOTE** This is the super admin of the application. This account will be created the first time you log into the Agent Desktop application. Use this account for creating, updating, deleting and viewing administrator accounts for Agent Desktop. This parameter value is user defined and should have less than 20 characters.

14. Change the Super Admin Password

<message-resources key="APP\_OPTIONS:LdapAdminPwd" parameter="**SUPER\_ADMIN\_PWD**" />

**NOTE** This parameter value should have less than 20 characters.

15. Change the SMTP Host parameter for Agent Desktop email notifications

```
<message-resources key="APP_OPTIONS:SmtpHost" parameter="AGENCY_SMTP_HOST"/>
```

**NOTE**

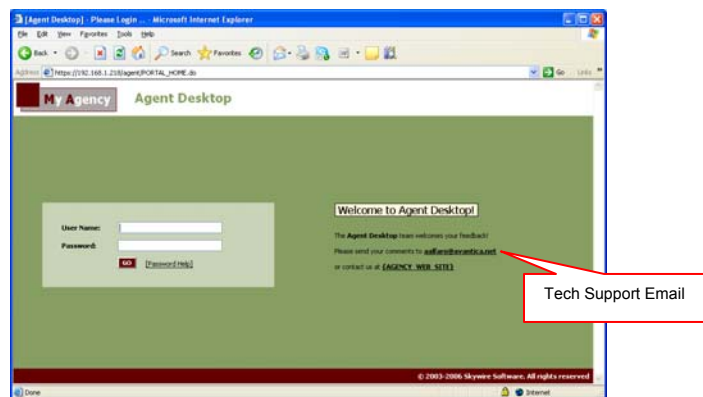
This parameter value contains the email server where the email notifications are going to be sent. If it is not set then Agent Desktop will not send any email notifications. Also, this parameter should have the SMTP host for the Tech Support Email described below.

16. Change the TechSupportEmail parameter

```
<message-resources key="APP_OPTIONS:TechSupportEmail"  
parameter="AGENCY_TECH_SUPPORT_EMAIL"/>
```

**NOTE**

This parameter value contains the email account where the email notifications are going to be sent. If it is not set then Agent Desktop will not send any email notifications. This parameter is displayed on the Agent Desktop login page. If it is not set then Tech Support email would not be displayed.

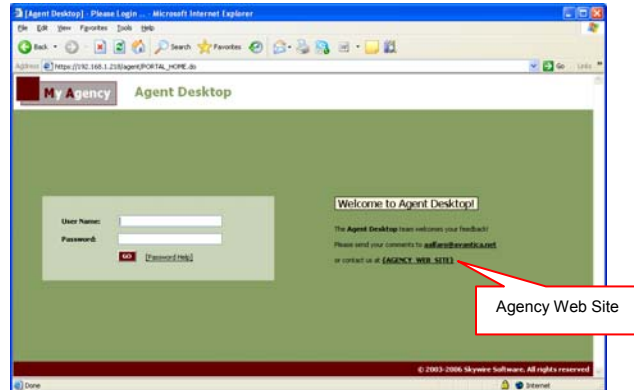


After all these modifications save the idt-struts-config.xml file (File/Save) and close notepad.

## Agent Desktop Company Web Site Customization

---

On the Agent Desktop Login Page, a Company Web Site link will be shown.



For Agent Desktop Company Web Site customization follow the next steps:

1. Go to **Start > Run** and then type:

notepad C:\AgentDesktop\Tomcat5018\webapps\agent\stylesheets\idt\_info\_content.xml

Into the Open field, and then click OK.

2. Find the next Text:

```
<a href="javascript:showNewBrowserWindow('AGENCY_WEB_SITE', "", 800, 600)"  
class="FormNoteText">  
<strong>AGENCY_WEB_SITE</strong>
```

3. Replace the **AGENCY\_WEB\_SITE** text with the current Agency Web Site URL.

## Agent Desktop Logo Customization

---

For Agent Desktop logo customization follow these steps:

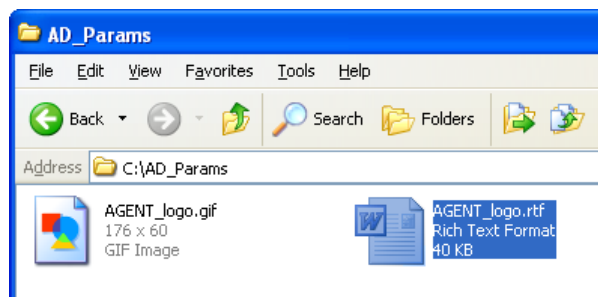
1. Create a new logo image and then save it as AGENT\_logo.gif (GIF format) in a folder (i.e. C:\AD\_Params\)



### NOTE

Image height should not exceed 60 pixels and width should not exceed 120 pixels.

- Open a new document in Microsoft Word, insert the logo image into it (via Insert/Picture/From File... menu) and then save it as AGENT\_logo.rtf (*Rich Text Format*) in the same folder as the image itself (In our example, C:\AD\_Params\)



- Copy the provided \Setup Files\customize\_logo.bat batch file to C:\AgentDesktop\Tomcat5018\webapps
- Go to **Start > Run** and then type the following text:

notepad C:\AgentDesktop\Tomcat5018\webapps\customize\_logo.bat

Into the Open field, and then click OK.

```

File Edit Format View Help
rem %1 -- folder that have AGENT_logo.gif, AGENT_logo.rtf files
@echo off

if not '%1' == '' goto start_proc
@echo Please define a folder where AGENT_logo.gif, AGENT_logo.rtf files reside.
pause
goto exit

:start_proc
rem -- In the DEPLOYMENT_HOME variable please define the path to the installation directory
@set DEPLOYMENT_HOME=(INSTALLATION_DIRECTORY)
rem -- name for the application directory
@set PORTAL_APP=agent
rem -- application directory
@set APP_DIR=%DEPLOYMENT_HOME%\Tomcat5018\webapps\%PORTAL_APP%

@set SUR_CLASSPATH=
rem -- adding the path to the idesktop library
@set SUR_CLASSPATH=%SUR_CLASSPATH%;%APP_DIR%\WEB-INF\lib\idesktop.jar

@set JAVA_DIR=%DEPLOYMENT_HOME%\jdk1.4.2_02

@set GIF_IMG=AGENT_logo.gif
@set IN_RTF=AGENT_logo.rtf
@set OUT_JSP=AGENT_LOGO.jsp

rem -- cleaning up previous AGENT_LOGO.jsp
if exist %OUT_JSP% del %OUT_JSP%

rem -- compiling the new AGENT_LOGO.jsp
%JAVA_DIR%\bin\java.exe -cp %SUR_CLASSPATH% com.iti.action.ProcessRTFTemplate -i %1\%IN_RTF% %1\%OUT_JSP%

```

Once you have opened the file, modify the next line:

(11) @set DEPLOYMENT\_HOME=INSTALLATION\_DIRECTORY

Change the **INSTALLATION\_DIRECTORY** with the path to the installation directory (C:\AgentDesktop)

After the modification that line would be like this:

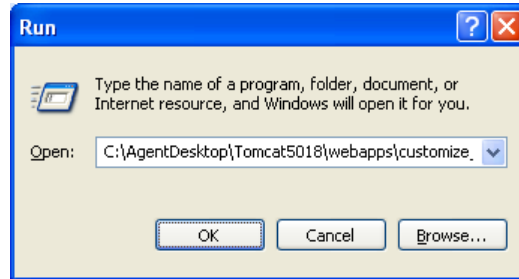
(11) @set DEPLOYMENT\_HOME=C:\AgentDesktop

**NOTE** Do not use a trailing '\ ' in the installation directory path because it will cause errors.

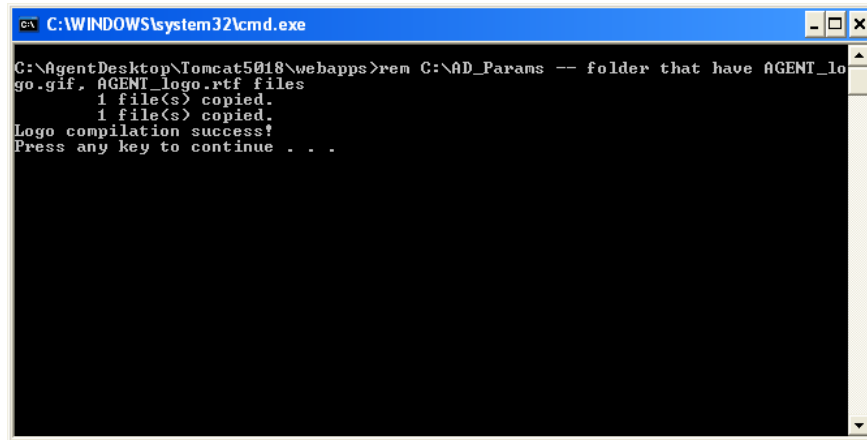
Save the file (File/Save) and then close Notepad.

5. Finally, go to **Start > Run** menu, and then type:

C:\AgentDesktop\Tomcat5018\webapps\customize\_logo.bat C:\AD\_Params



Into the Open field, and then click OK.



# User Load and Configuration

---

## Loading Agent from GA Database to Agent Desktop Database

---

For loading agents into Agent Desktop database you will have to run the provided batch file `convert_ga_agents_to_users.bat`.

1. Copy the provided `\Setup Files\convert_ga_agents_to_users.bat` batch file to `C:\AgentDesktop\Tomcat5018\webapps`
2. Go to **Start > Run** and the type the following text:

```
notepad C:\AgentDesktop\Tomcat5018\webapps\convert_ga_agents_to_users.bat
```

Into the Open field, and then click OK.

There are several changes in order to run the batch successfully. You will have to change all the parameter values with braces `{}`

### NOTE

Make sure not to use any leading or trailing spaces in the parameter's values.

- **Line 7 - @set GA\_DB\_SERVER\_NAME=AGENCY\_GA\_SERVER\_NAME**  
Specify the name or the IP address of the `GA_DB_SERVER_NAME`.  
  
For example, `@set GA_DB_SERVER_NAME=192.168.1.1`
- **Line 8 - @set GA\_DB\_NAME=AGENCY\_GA\_DATABASE\_NAME**  
Specify the name of the GA database.  
  
For example, `@set GA_DB_NAME=MyAgency_GA`
- **Line 9 - @set GA\_DB\_USER=AGENCY\_IDESKTOP\_USER\_NAME**  
Specify the username for the GA database.  
  
For example, `@set GA_DB_USER=ga_db_usr`
- **Line 10 - @set GA\_DB\_PWD=AGENCY\_IDESKTOP\_USER\_PWD**  
Specify the password related to the GA database user described in the previous line.  
  
For example, `@set GA_DB_PWD=abc123`
- **Line 12 - @set UA\_DB\_SERVER\_NAME=AGENCY\_IDESKTOP\_SERVER\_NAME**  
Specify the name or the IP address of the `UA_DB_SERVER_NAME`.  
  
For example, `@set UA_DB_SERVER_NAME =192.168.1.1`

- **Line 13 - @set UA\_DB\_NAME=AGENCY\_IDESKTOP\_DATABASE\_NAME**  
Specify the name of the IDESKTOP database.

For example, @set UA\_DB\_NAME=IDESKTOP

- **Line 14 - @set UA\_DB\_USER=AGENCY\_GA\_USER\_NAME**  
Specify the username for the GA database.

For example, @set UA\_DB\_USER=idsk\_usr

- **Line 15 - @set UA\_DB\_PWD=AGENCY\_GA\_USER\_PWD**  
Specify the password related to the IDESKTOP database user described in the previous line.

For example, UA\_DB\_PWD=abc123

- **Line 17 - @set DEPLOYMENT\_HOME=DEPLOYMENT\_ROOT\_PATH**  
Specify the path to the Agent Desktop installation directory.

For example, @set DEPLOYMENT\_HOME=C:\AgentDesktop.

**NOTE** Do not use a trailing '\' in the installation directory path because it will cause errors.

- **Line 20 - If you want to send emails for account activation this parameter must be set.**

If this parameter is not set then there will be no email sent.

@set SMTP\_HOST=SMTP\_HOST.

For example, @set SMTP\_HOST=smtp.myserver.com

**NOTE** If this parameter is set then every user created will receive an email notification. If this behavior is not wanted then leave this parameter blank.

- **Line 22 - If you want to send emails for account activation this parameter must be set.**

If this parameter is not set then there will be no email sent. This is the email account in order to send emails.

@set EMAILFROM=AGENCY\_Tech\_SUPPORT\_EMAIL.

For example @set EMAILFROM=myemail@myagency.com

**NOTE** If this parameter is set then every user created will receive an email notification. If this behavior is not wanted then leave this parameter blank.

- **Line 26 - @set APP\_URL=https://SERVER\_NAME/agent/start**  
Specify the name or the IP address of the Agent Desktop application server.

For example, @set APP\_URL=https://192.168.1.1/agent/start

- **Line 27 - @set HELP\_DESK\_PHONE=AGENCY\_HELP\_DESK\_PHONE**  
Specify the phone number of the helpdesk area for the Agent Desktop installation. This phone number will be attached to the activation email once the process activates a user account and the application sends an activation email.

For example, @set HELP\_DESK\_PHONE=1-800-555-1212

**NOTE** Do not use blank characters to separate phone numbers.

- **Line 29 - @set LAST\_ACTIVITY\_DAYS\_AGO=LAST\_ACTIVITY\_DAYS\_AGO**  
Specify the maximum number of inactivity days that a user may have in order to create an Agent Desktop account.

For example, @set LAST\_ACTIVITY\_DAYS\_AGO=180. This means that if an agent has not been active within the GA database during the last 180 days, an account will not be created in Agent Desktop.

**NOTE** We suggest verifying the agents GA database activity before running the script in order to specify a proper value for this parameter.

- **Line 30 - @set DEFAULT\_LOGIN\_NAME\_PREFIX=DEFAULT\_LOGIN\_NAME\_PREFIX**  
This is a default login name prefix to use on account creation.

For example, @set DEFAULT\_LOGIN\_NAME\_PREFIX=ad\_

**NOTE** This will create ad\_ **USER\_NAME** as login names for every user. If you do not want to specify a default login name prefix leave it blank.

- **Line 31 - @set DEFAULT\_PASSWORD=DEFAULT\_PASSWORD**  
Specify a default password for the accounts.

For example, @set DEFAULT\_PASSWORD=pass123

#### FOR THE NEXT PARAMETERS WE WILL USE YES/NO VALUES (Y/N)

- **Line 35 - @set ACTIVATE\_WITH\_PERSONAL\_PWD=N**  
If this parameter is set to **Y** then the application will try to create the Agent Desktop users with an active account status.
- **Line 36 - @set USE\_EMAIL\_ADDRESS\_AS\_LOGIN\_FIRST=N**  
If this parameter is set to **Y** then the application will use the first part of the agent's email address (before the @) as the login name for Agent Desktop.

If any duplicates are found, then the application will try to use to use the first letter of the Agent's Name followed by the Agent's Last Name as the login name for Agent Desktop.

Otherwise, if this parameter is set to **N** then the application will use Agent's Name (as explained above) first rather than the agent's email address as the login name for Agent Desktop.

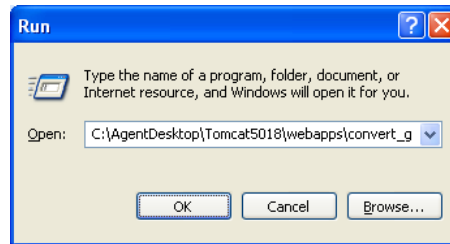


- **Line 37 – @set USE\_FULL\_EMAIL\_ADDRESS\_AS\_LOGIN=N. This parameter must be set to N since Agent Desktop doesn't allow emails as usernames.**

After the modification, save the file (File/Save) and close Notepad. Now the batch file is ready to be executed. Go to Start/Run menu, and then type:

**C:\AgentDesktop\Tomcat5018\webapps\convert\_ga\_agents\_to\_users.bat**

Into the Open field, and click OK.

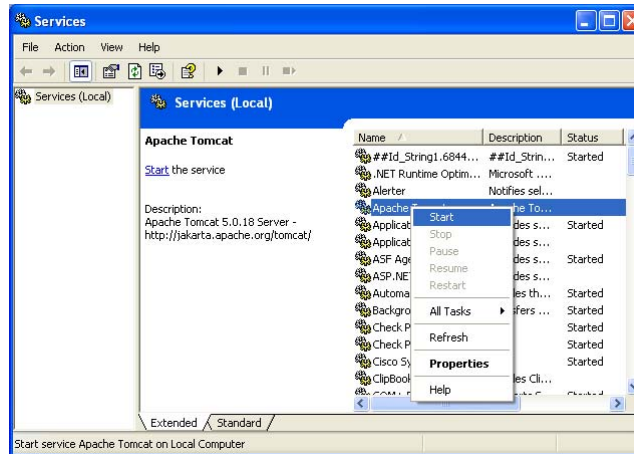


# Installation Testing

In order to test the Agent Desktop installation, the Apache Tomcat Service should be started.

To do this, follow the next steps:

1. **Go to Start > Control Panel > Administrative Tools > Services.** Look for the Apache Tomcat Service and Start it.

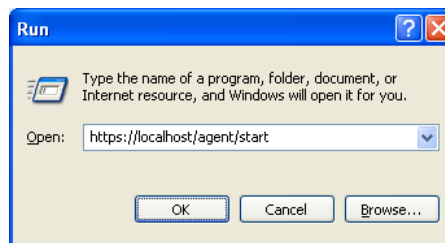


## NOTE

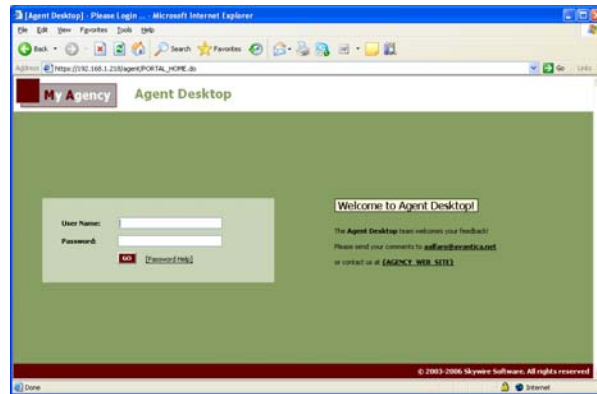
Apache Tomcat initialization process takes about 1- 2 minutes. During this time, applications cannot be accessed.

2. Go to **Start > Run** menu, and then type:

`https://SERVER_NAME/agent/start`



3. An Internet Explorer window should appear showing the Agent Desktop homepage.



4. Log as the admin user.

<b>NOTE</b>	The admin user information is located in the idt-struts-config.xml in the LdapAdmin parameters.
-------------	---

# Uninstalling Agent Desktop

---

In order to uninstall the Agent Desktop application, all the components installed along with Agent Desktop must be removed too.

## NOTE

It may be possible that other applications may use these components. In this case the removal of these components may interfere with these applications, so it is recommendable to verify which applications will be affected before uninstalling.

## Uninstalling Apache Tomcat

---

1. Go to **Start > Control Panel > Add or Remove Programs**.
2. Select **Apache Tomcat 5.0** and click the **Change/Remove** button.
3. Follow the instructions in order to remove Apache Tomcat.

## Uninstalling Java SDK

---

1. Go to **Start > Control Panel > Add or Remove Programs**.
2. Select **Java 2 SDK, v1.4\_02** and click the **Change/Remove** button.
3. Follow the instructions in order to remove Java SDK.

## Remove Agent Desktop Installation Directory

---

1. Go to **Start/Run** menu, and then type: **explorer**.
2. **Windows Explorer** will be displayed.
3. Go to the Agent Desktop Installation folder/drive and select the Agent Desktop Installation directory.
4. Go to **File** menu and click on **Delete**.

# Support

---

If during the installation or configuration of Oracle Insurance Agent Desktop you receive an error or need a question answered, please contact Oracle Insurance Support at [support-skywire\\_ww@oracle.com](mailto:support-skywire_ww@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  
[oracle.com](http://oracle.com)

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