

# Oracle Insurance General Agent Installation & Upgrade Guide

Version 8.1

April 2009

*Oracle Insurance General Agent Installation & Upgrade Guide*

*Version 8.1*

*Part # E14964-01 Library 14885-01 & E14886-01*

*Formerly P01-326-03*

*April 2009*

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# Preface

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Welcome to the *Oracle Insurance General Agent Installation & Upgrade Guide*. Oracle Insurance General Agent (OIGA) is a complete agency management system designed specifically for life, annuities, and long-term care producers such as brokerage general agencies, independent marketing organizations, and general agents.

The Oracle Insurance General Agent application has a database backend that can be configured to utilize many different configurations. This document is meant to help with the installation of the Oracle Insurance General Agent.

## Audience

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This guide is intended for system administrators, installers, database administrators and others tasked with installing and configuring the OIGA system and associated databases.

## E-Delivery

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Oracle Insurance General Agent 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 OIGA 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 OIGA 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, if the OIGA installation file is part # 15455-01 and the file name is V154551-01, you may need to provide this information to Oracle Support if you need to contact them.

## Oracle Insurance Support Policy

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Oracle Insurance supports Oracle Insurance products only. Oracle Insurance does not provide support for the other manufacturers' hardware or software.

## 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 | P01-326-01                | GA 2006                | June 2006               |                |
| 2 <sup>nd</sup> Edition | P01-326-02                | GA 8.0                 | January 2009            | Version Update |
| 3 <sup>rd</sup> Edition | P01-326-03                | OIGA 8.1               | April 2009              | Version Update |

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## Pre-Installation Checklist

The following checklist can be used to help in installing and configuring OIGA.

- ❑ **Hardware and software requirements have been met.**
  - ❑ Admin rights to install and configure on the database and file servers
  - ❑ Admin rights to shared network drives and files
- ❑ **Check for needed dependencies**
  - ❑ Adobe Acrobat 6.0 or 7.0 – needed for Print Utility
  - ❑ IIS – needed for WebGA
  - ❑ Microsoft .NET Framework version 2.0 – needed for WebGA
  - ❑ Ajax for .NET 2.0 – needed for WebGA
  - ❑ Infargistics NetAdvantage\_NET\_20072\_CLR20 – needed for WebGA
  - ❑ Microsoft .NET Framework version 3.5 SP1 – needed for OIDX data download.
- ❑ **Check Database Server for needed requirements**
  - ❑ SQL Server utilized
  - ❑ Proper Network Connection to Database Server
  - ❑ Admin rights to restore and configure
- ❑ **Install OIGA Server**
  - ❑ Make sure no users are connected to GA database
  - ❑ For existing upgrade, backup existing GA data and GA installation folder
  - ❑ For New Install, restore .BAK database on SQL Server
  - ❑ Database Name: \_\_\_\_\_
  - ❑ For New Install, Run Corporation Script with corporation name and alias
  - ❑ For New Install, DNS Connection created
- ❑ **After Server Installation**
  - ❑ Share the OIGA Install folder
  - ❑ Install Client on individual workstations
  - ❑ Install WebGA on the Web server
  - ❑ Install Agent Desktop database on the same server with OIGA database
- ❑ **Install OIGA Client**
  - ❑ Proper Network Connection to Server files
  - ❑ Install the OIDX module on machine where the data download will take place
  - ❑ For New Install, DNS Connection created

## Required Components

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All 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:

- **MDAC 2.8**
- **Microsoft .NET Framework, version 2.0 or 3.5**
- **IIS – Internet Information Services**
  - Version 5.0 for Windows 2000
  - Version 6.0 for Windows 2003

## MDAC 2.8

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OIGA requires MDAC 2.8. This is especially important if OIGA 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 and above.

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.

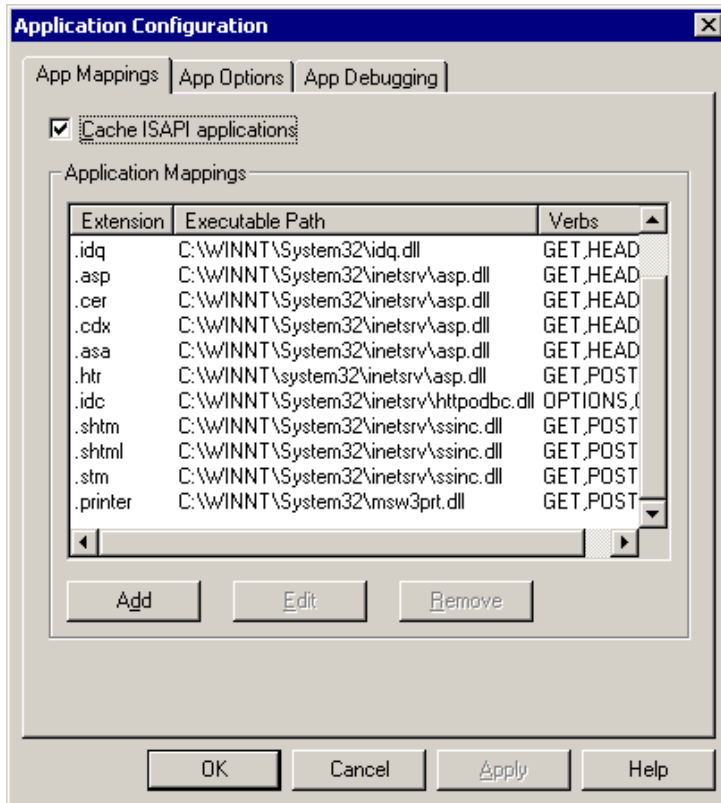
If you have not upgraded to MDAC 2.8 the installation program will indicate that it is missing from your system. Visit the Microsoft Support Website to download the necessary MDAC 2.8 components.

## Microsoft .NET Framework

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Required for Windows 2000 and Windows 2003. The installation application attempts to install all necessary dependencies that may be missing on the web host and will attempt to install the Microsoft .NET 2.0 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 2.0 prior to starting the OIGA 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 double checked by opening Internet Service Manager and right clicking the Default Web Site, selecting properties, then select the Home Directory tab. Press the Configuration... button and scroll down to the bottom.



If you don't see any of the ASPNET extensions (.asax, aspx, .asmx, etc.) pointing to %WINDIR%\Microsoft.NET\Framework\v2.0.50727\aspnet\_isapi.dll, then the .NET framework was probably installed prior to installation of IIS.

In order to install the ASPNET ISAPI extensions use the aspnet\_regiis.exe located in the Framework\v2.0.50727 folder. If you want to upgrade all default web applications under IIS to use the 2.0 framework ASPNET ISAPI, use the following syntax:

```
C:\WINNT\Microsoft.NET\Framework\v2.0.50727>aspnet_regiis.exe -i
```

- i - Install this version of ASP.NET and update script maps at the IIS metabase root and for all script maps below the root. Existing script maps of lower version are upgraded to this version.

#### NOTE

Microsoft .NET Framework version 3.5 SP1 is required for OIDX.

## Internet Information Services (IIS) 6.0

**Required for Windows 2003.** WebGA is a web based application and requires IIS to be installed to facilitate the default web virtual directories creations.

The subcomponents of Application Server needed by WebGA:

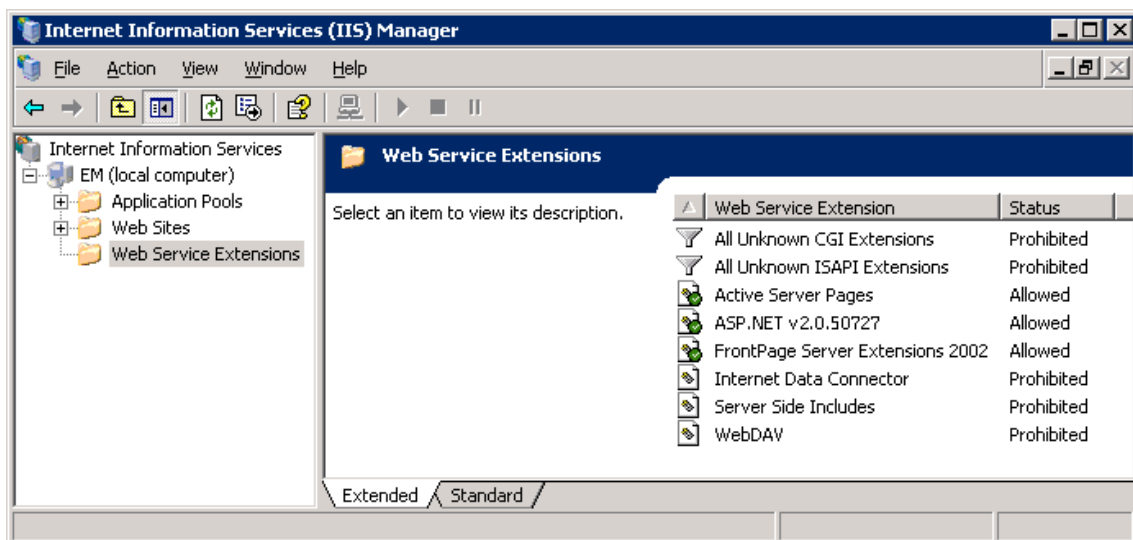
- Application Server Console
  - ASP.NET



- Enable network COM+ access
- Internet Information Services (IIS)
  - Common Files (default)
  - SMTP Service – 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 and ASP.NET v2.0.xxxx must be enabled.**

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:



## Microsoft SQL Server 2000 or 2005

Microsoft SQL Server does not need to be installed on the same machine where OIGA resides. If the SQL Server resides on a separate host from OIGA, a properly configured network connection from OIGA 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.

**NOTE** We recommend running your databases on a SQL Server 2005 instance.

## NOTE

All these settings are available during installation of SQL Server or by using SQL Server Enterprise Manager, and right clicking the server and selecting properties.

If any of these settings conflict with existing application's databases residing on the SQL Server, then a separate instance is required.

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.

## 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.

## Using Adobe Acrobat with Print Utility

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If you would like to use Print Utility to send correspondence as an Adobe Acrobat PDF file, you must be sure to install the full version of Adobe Acrobat 6.0 or higher on the Print Utility machine. It is recommended that Print Utility be installed on a separate machine.

When you run the Adobe Acrobat installation, make sure to choose the "custom installation" option and select to install the PDF Writer.

If you do not do a custom installation of Adobe Acrobat and select to install the PDF Writer, then the option to generate PDF files will not be available through Print Utility.

## Additional Considerations

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Consider the following:

- You must install Adobe Acrobat to email .PDF documents. Be sure to install the full version of Adobe Acrobat 6.0 or 7.0 on the Print Utility machine. When you run the Adobe Acrobat installation, choose the "Custom Installation" option and select "install the PDF Writer."
- OIGA 8.1 HAS NOT been tested with Office 2007, Adobe Acrobat 8.0, or 64 bit machines.
- **If you are going to install Agent Desktop:** Agent Desktop requires a special database that should be located on the same Server where the OIGA database is located.

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## Installing OIGA

The OIGA installation you choose will depend upon the usage that you require.

The Server component can reside separately from the other components, on the same machine as the Client, on the same machine as the database, or on the same machine as the Client and the database. The same is true for the Client. The Client component can reside separately from the other components, on the same machine as the Server, on the same machine as the database, or on the same machine as the Server and the database.

**NOTE**

MS SQL Server is the required database platform. MS SQL Server and OIGA can reside on the same machine. However, it is recommended that you have the MS SQL Server database on a separate machine for performance and security reasons.

- Make certain that you have administrative rights on the machine(s) where you will be installing and configuring OIGA and the corresponding database.
- Make certain that you have 'read and write' rights to the shared network drive(s) or folder(s) that all the clients use.

### Installing to a Dedicated Network Server

---

Installing the Server separately from the other components permits the Server to act as a True Server for a network. In this type of installation, all OIGA program files and libraries are installed on a shared network drive that allows multiple users to access the system simultaneously. Database files are on a separate database machine and each individual user will have a Client instance installed on their machine.

This type of installation works best in larger environments or in environments where users need to share data from the same database. In this type of installation, it is recommended that WebGA be installed on a dedicated web server separate from the OIGA installation files.

### Installing to a Non-Dedicated Network Server

---

A non-dedicated network server is a server that is also used as a workstation in the company. Installing the Server to a workstation allows for the OIGA program files and libraries to be stored locally and not over the network. The database will need to be located on the same machine. Individual users will have a Client instance installed on their machine.

This type of installation works best in a dedicated group or unit type environment where users within the same business unit need to share data but do not need to share this information with others in the company.

## Installing to a Standalone PC

---

Installing the Server and Client together on a standalone PC will install the all the program files to the hard drive of a single PC. If the database is installed on the same machine, only the person using that computer will be able to access the program.

This type of installation works best in a single person setup where no other users will need to access the program or database.

## Default Installation Settings

---

With the OIGA 8.1 release for new installations, the GA application is now registered under:

**C:\Program Files\Oracle\OIGA**

For existing clients, the current pathway will be used.

**NOTE**

*A server installation only creates the GA application with appropriate file structure and does not register components on the server.*

## New Server Install

This section will follow the procedure for a server/client setup with the server component being installed first on a network server, and the client being installed afterwards on a desktop with the database residing on a separate database server.

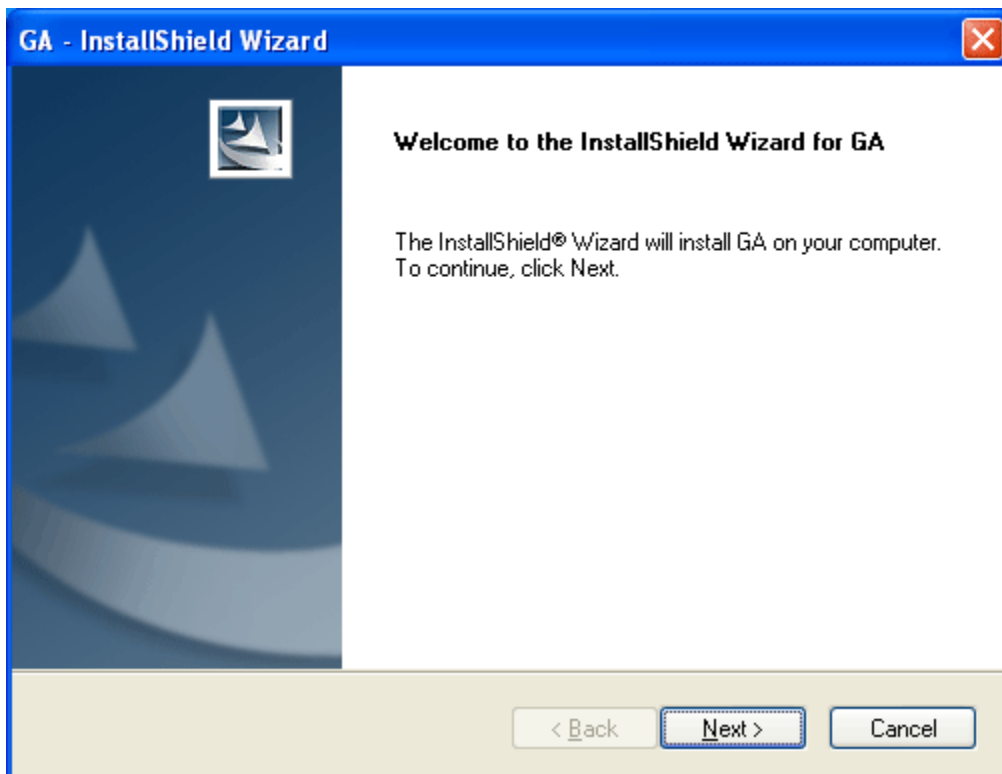
**NOTE**

*If you are using a Novell Network Operating System, then you must configure the OIGA server as a primary server.*

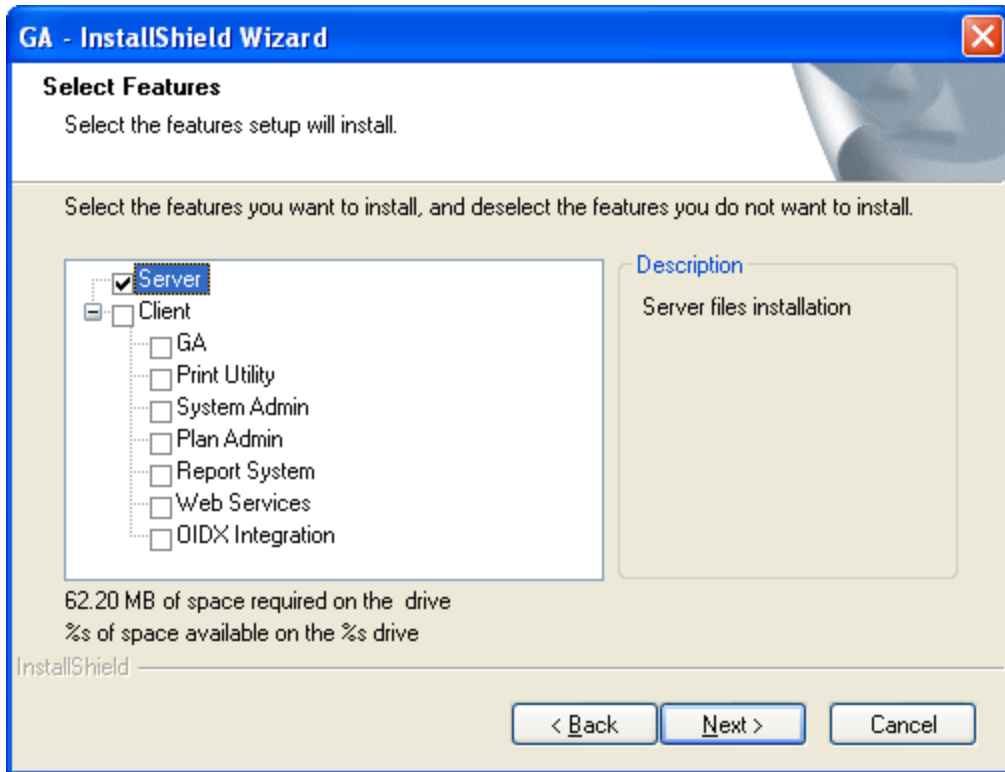
1. Unzip the download file you obtained from E-Delivery onto the machine where you want to install the Server portion of OIGA. Open the **OIGA** folder, where the installation file resides, and double-click the **OIGA8.1 .EXE** file.

The Preparing Setup screen will be displayed.

2. Welcome is next.



3. Click **Next**.



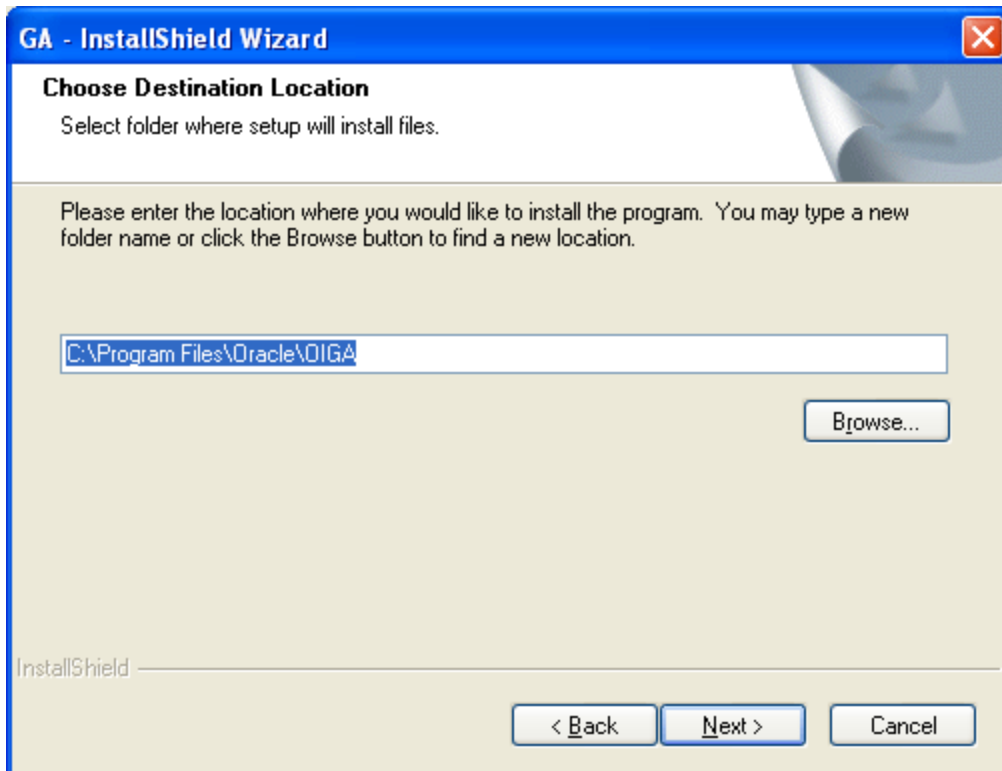
4. Select programs to install.

- **Server** – This option must be installed first and can be installed alone or on the same box and the Client and the database.
- **Client** – This option should be installed after server and can be installed on the same box as the Server or on a separate box.

5. For a Server only installation, select **Server**. Uncheck any other options.

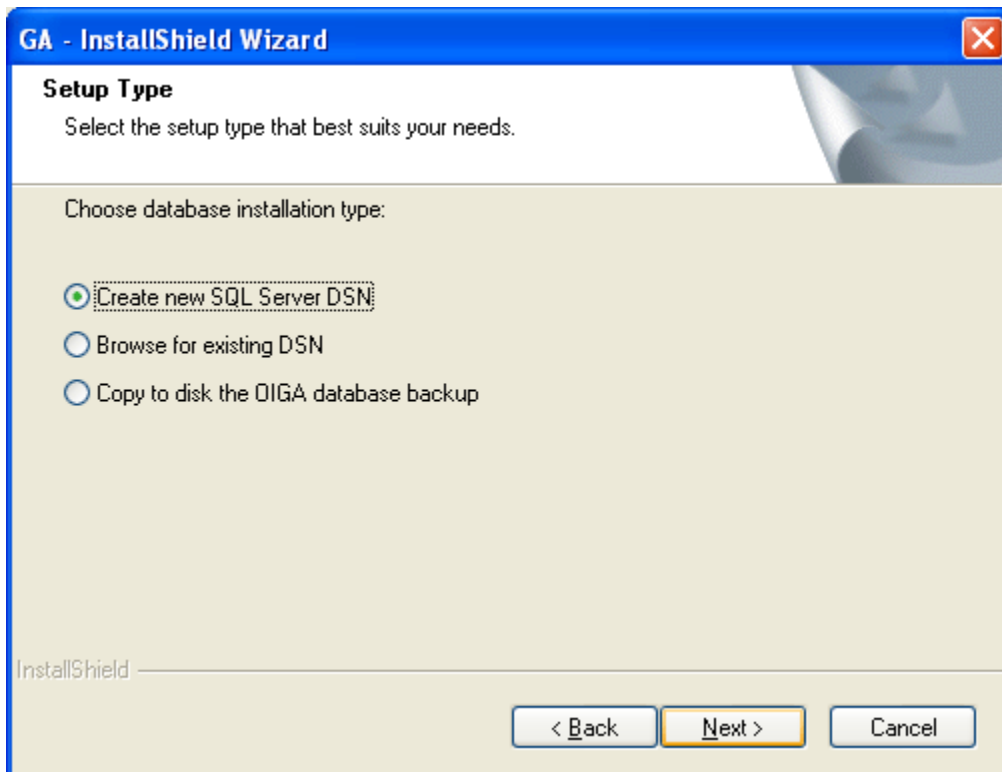
6. Click **Next**.

7. Select the **Destination Location**. The default destination will be displayed. If you want to change this, browse for the destination you need or enter the path directly.



8. Click **Next**.

9. Select **DB Method**.



**a. New Install**

- i. If this is a new install you must chose **Copy to disk the OIGA database backup**. This will load a pre-existing database to a file. Make note of the file location.
- ii. You will need to leave the OIGA install and go to your SQL Server instance. Retrieve the database file and restore it in your SQL Server instance. You can choose any database name. Make note of the database name. You will need that later in the install.
- iii. For a new installation, after you restore your database, you will need to run the `New_Corporation.sql` script. Before running the script, please open the script. You will need to enter your Corporation name and Alias in the script before running.
- iv. Return to the OIGA install. Click **Next**. The screen will refresh and only two choices will be available.
- v. New installs will have to select **Create New SQL Server DSN**. This option creates a new database connection. You must know the location of your database and be able to connect to it.

**NOTE**

You will not be allowed to continue until the database is restored.

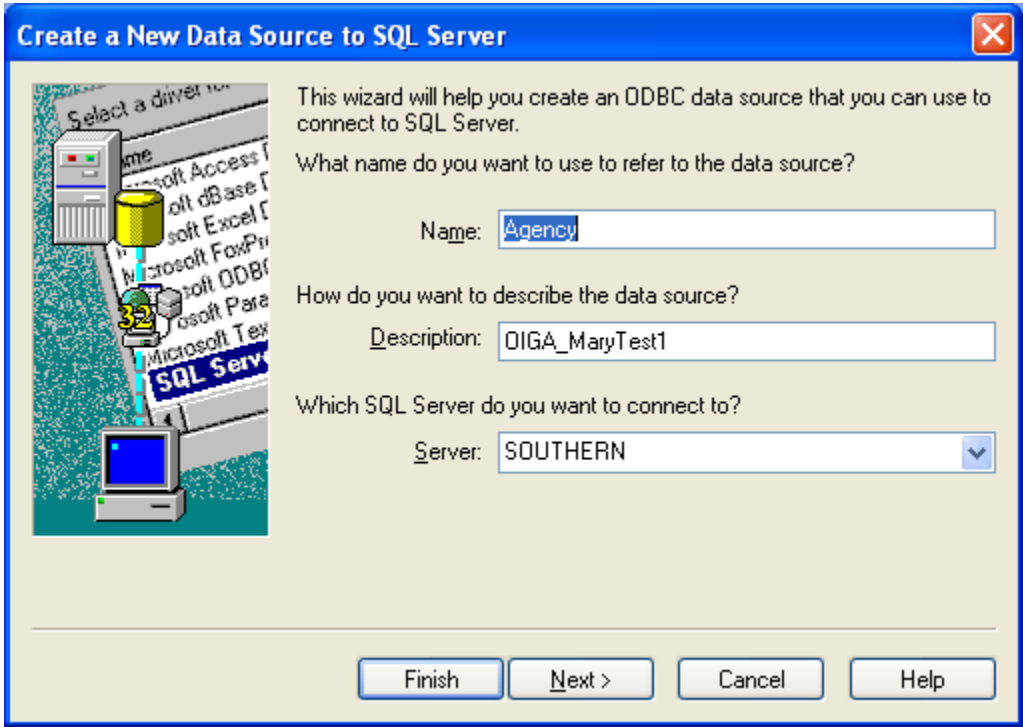
**b. Upgrades**

If you are upgrading OIGA, you can select the **Browse for existing DSN**. Browse for existing DSN allows you to select a pre-existing DSN. See page 31.



10. Creating a **New DSN**.

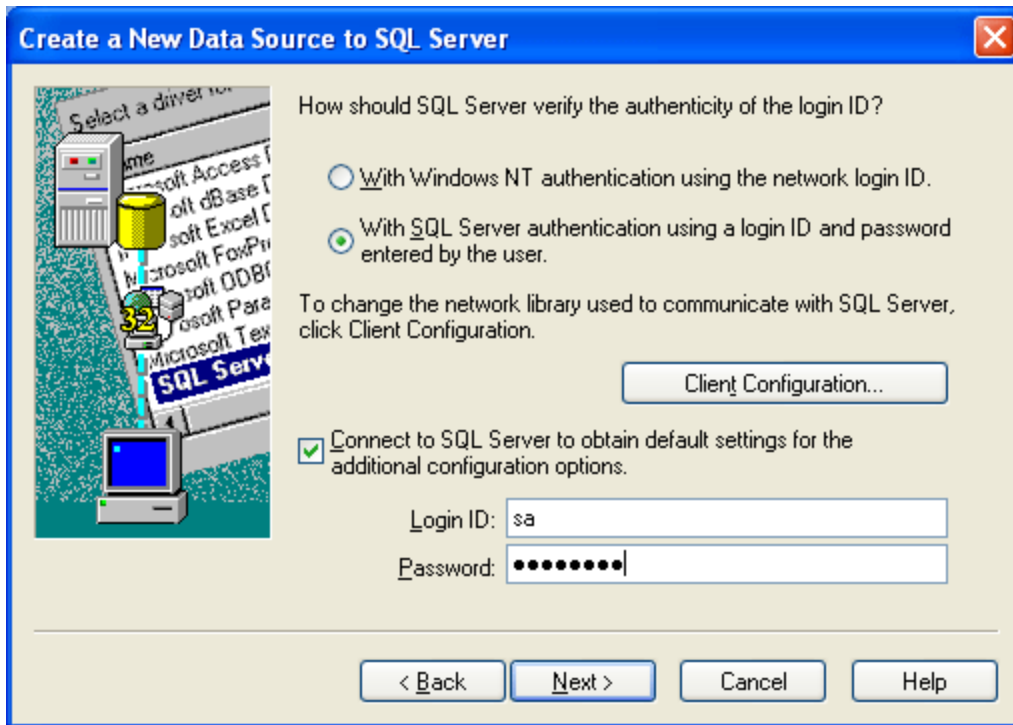
**NOTE** If you are upgrading or already have an existing DSN, please go to Step 18.



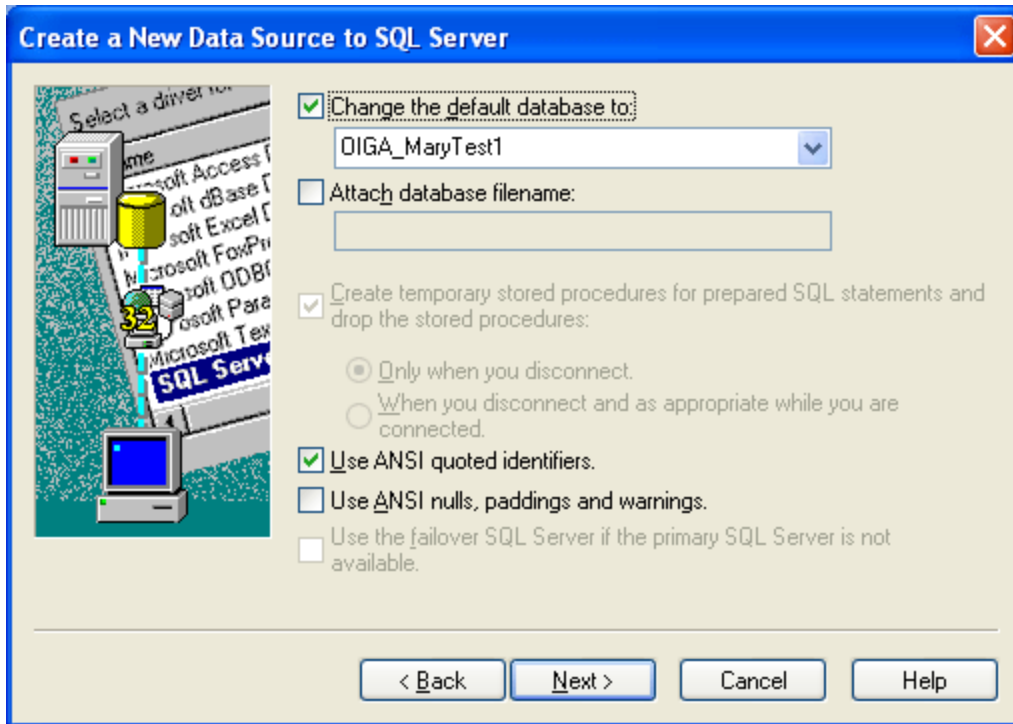
- a. The **Name** will default to **Agency**.
- b. Enter a **Description**.
- c. **Select the SQL Server** you want to connect to.

11. Click **Next** to continue.

12. The next screen is a default Windows screen for authentication. The options you have or will need to select will depend upon how security is set up in your company.



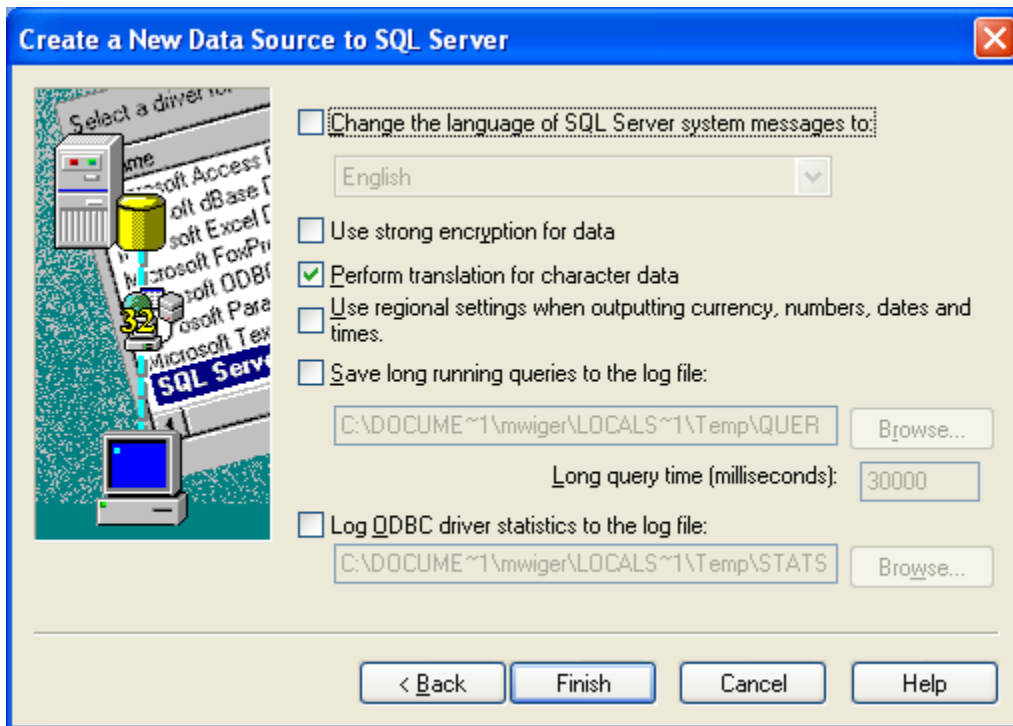
13. Click **Next** to continue.



14. The next default Windows screen may require you to **Change the default database** to the database you created.

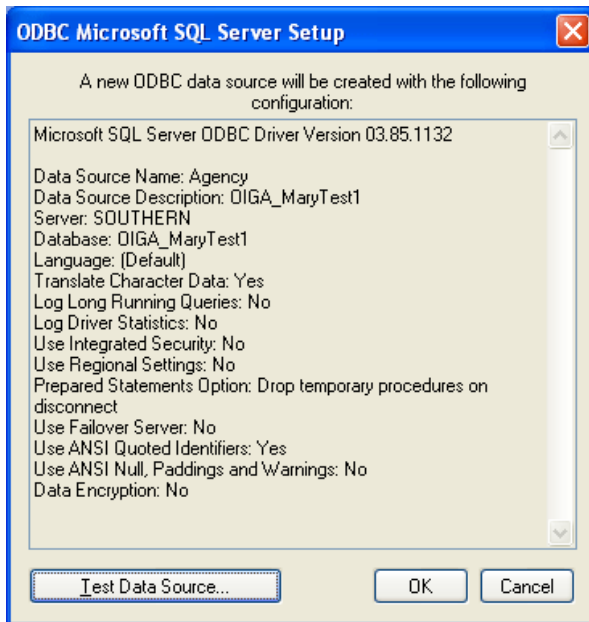
15. Uncheck the **Use ANSI nulls**, padding and warnings box.

16. Click **Next** to continue.

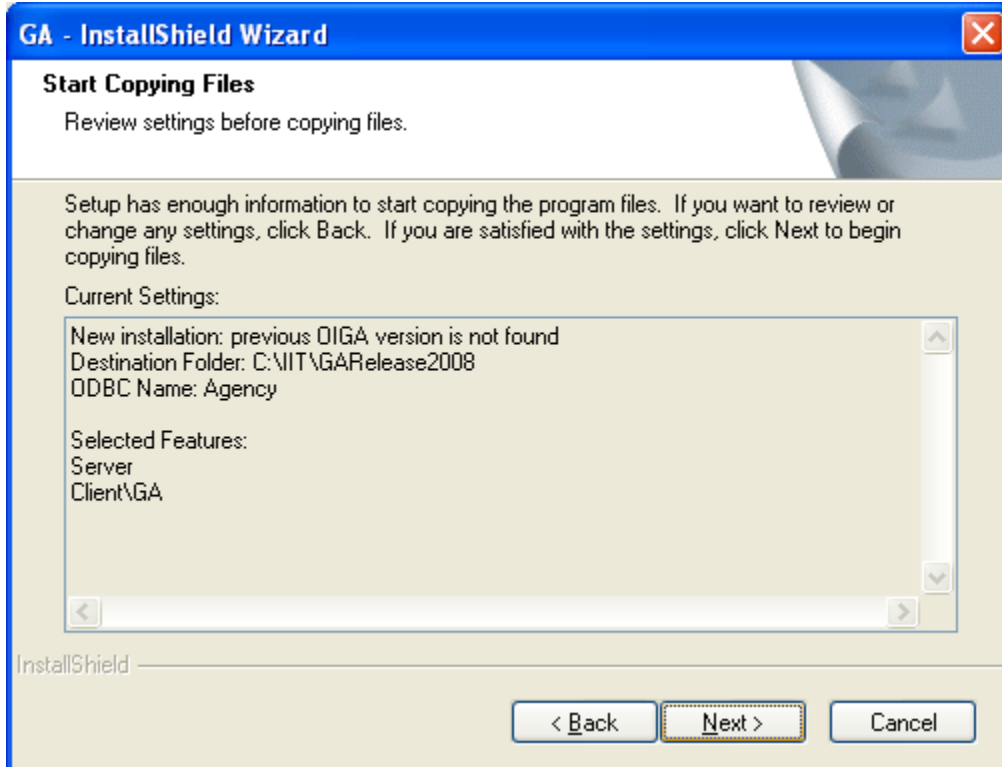


17. The next screen does not require any changes. Click **Finish** to continue.

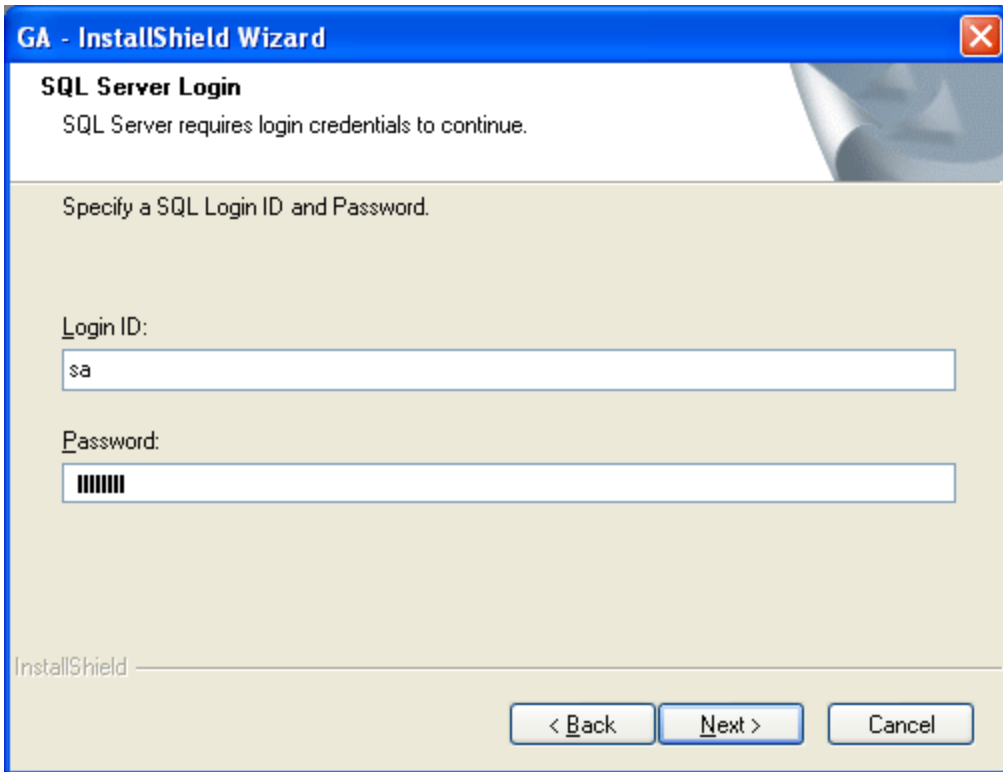
The ODBC screen will be displayed. It is recommended that you test your data source.



18. After setting up the DSN, the install will begin.



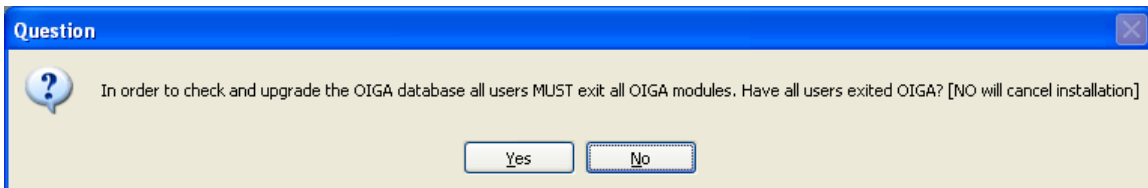
19. Click **Next** to continue.



20. Enter your sa login and password.

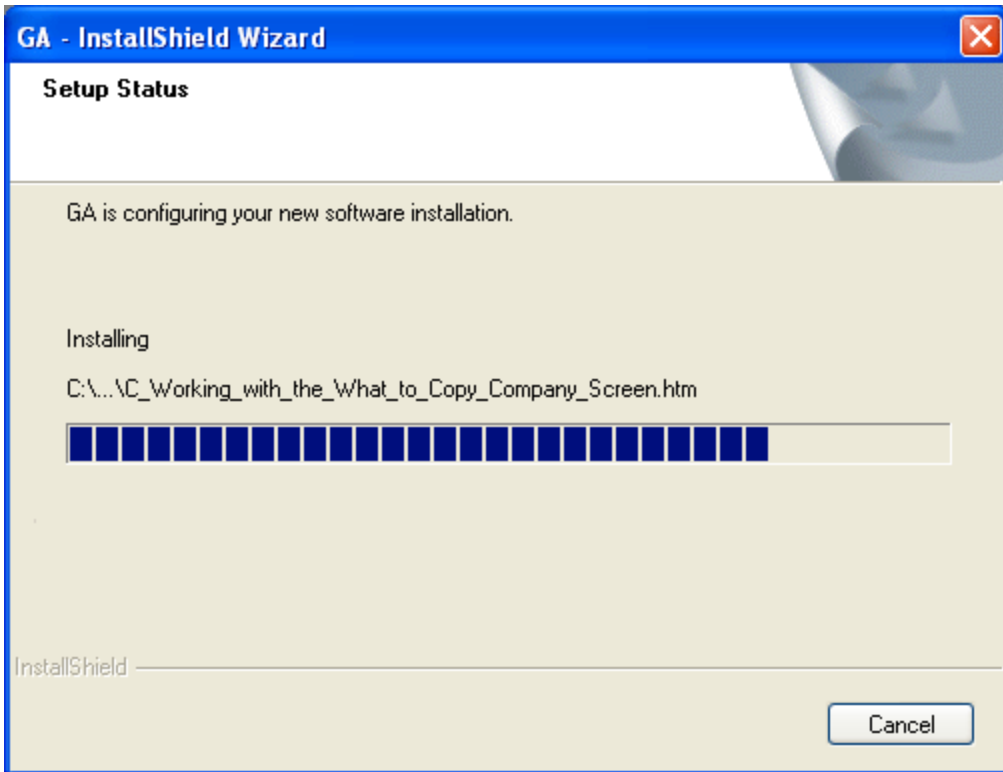
**It is recommended that you use the SA login.**

21. Click **Next** to continue.



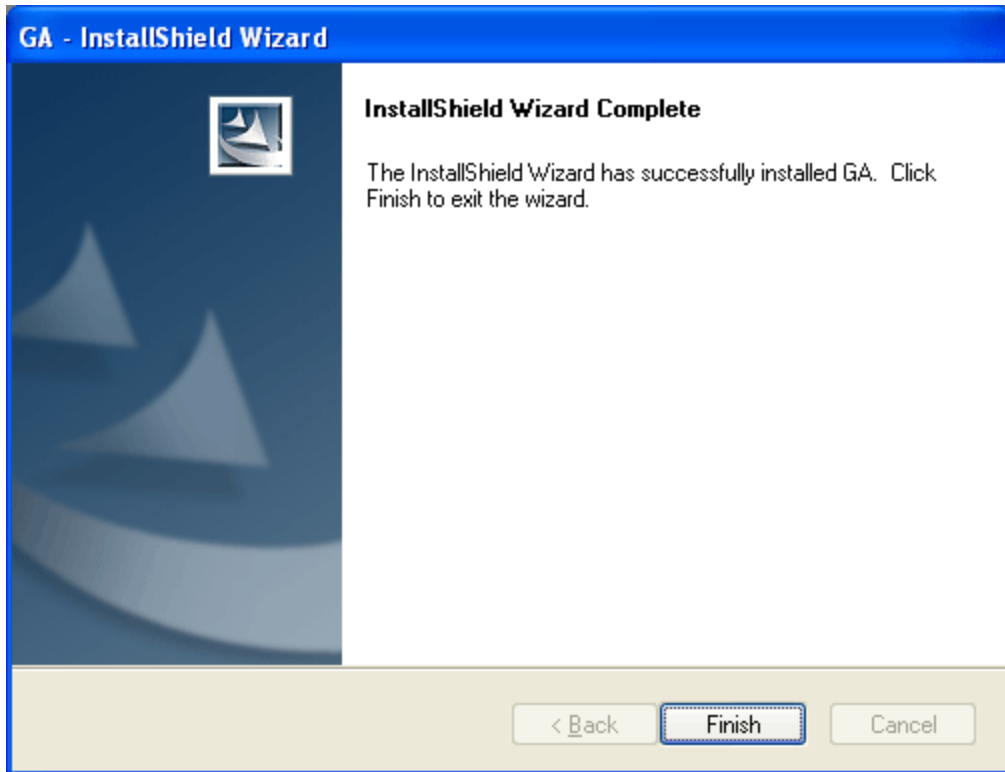
22. Make sure that no users are connected to the database. **Click Yes** if no open connections exist.

The database updates will begin. After successfully updating the database, the OIGA files will be copied to the installation folder.



The **Setup Status** will be displayed. When the installation is complete, the success screen will be displayed.

If any errors are encountered, an error screen will be displayed. Please contact Support for assistance.



23. Click **Finish** to complete the install.

24. In some cases the installation may require a reboot.

## After the Install

---

- The **Server files for GA must be shared** in order for other users to access them.
- WebGA, OIDX, Agent Desktop and/or Client can be installed after OIGA is installed.
- No OIGA icons will be displayed on a Server only machine.

### Log Files

If there were any errors during the installation, you can check the log files. Log files will be located in C:\log and in the GA installation folder that was created.

---

## New Client Install

This section will continue the procedure for a server/client setup with the server component being installed first on a network server, and the client being installed afterwards on desktops with the database residing on a separate database server.

The Client installation allows multiple users to share the OIGA program and database. A Client installation will create icons for each specific OIGA module selected on the desktop of the user.

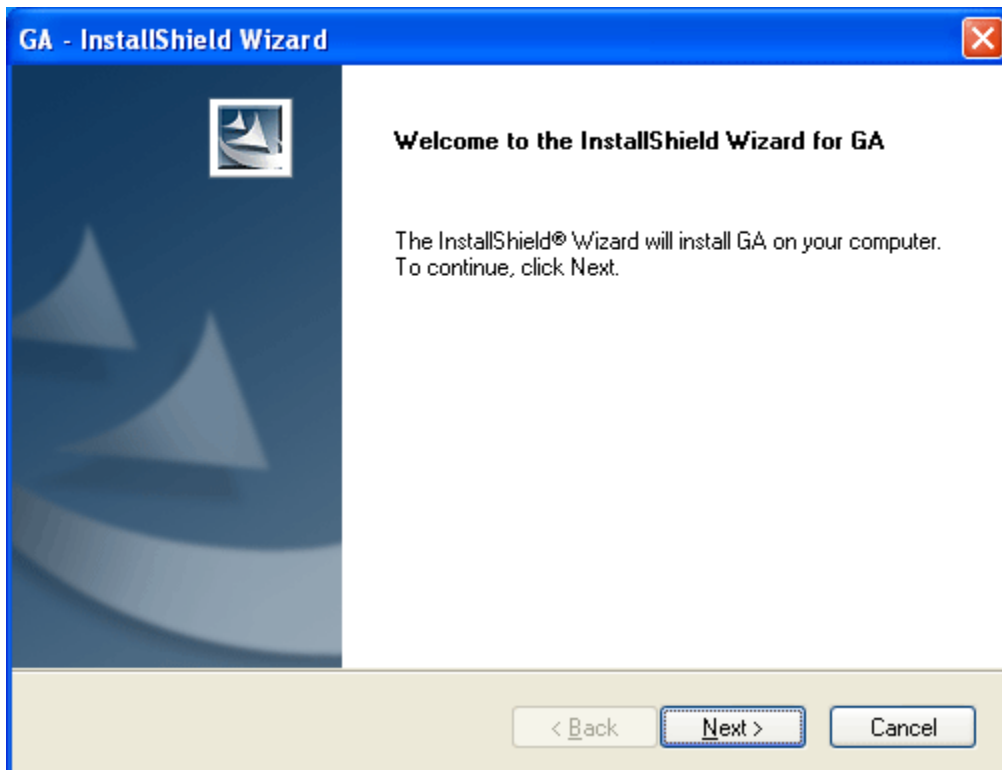
### For a Client installation, you need to have:

- Location of the OIGA Server files.
- Administration rights to the machine. A DSN will need to be created.

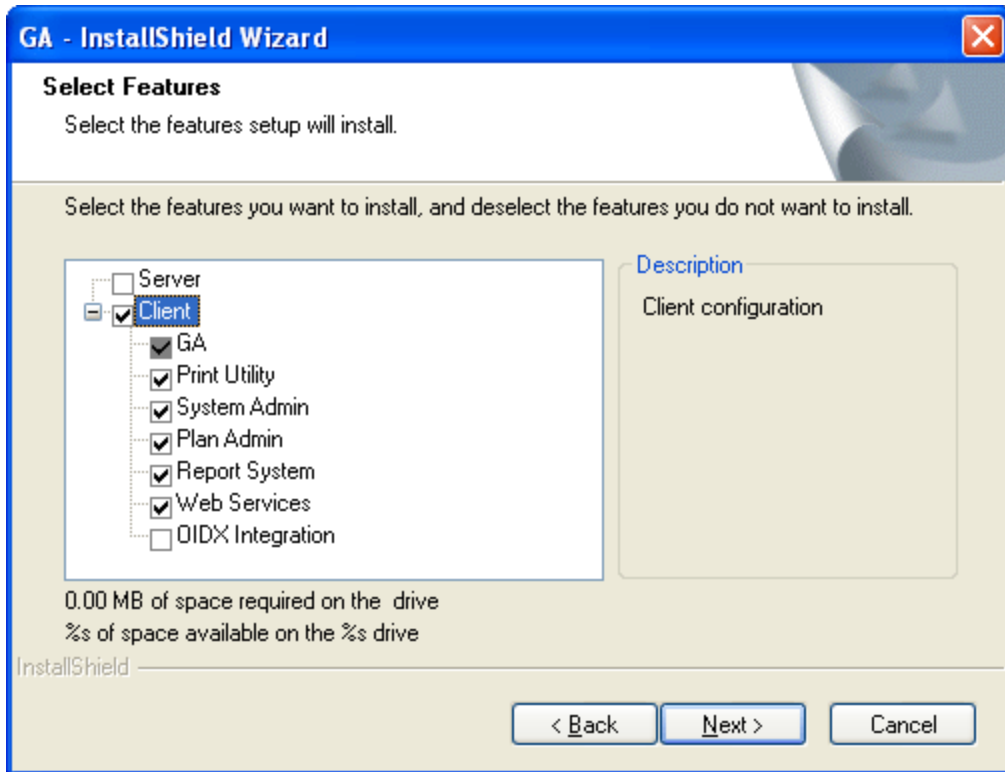
**NOTE**

*Before beginning a Client installation or version upgrade, be sure that you have already installed OIGA Server.*

1. Unzip the download file you obtained from E-Delivery onto the machine where you want to install the Client portion of OIGA. If available, you may be able to access the install file from the machine where the Server instance is loaded.
2. When the Welcome screen is displayed, click **Next** to continue.







3. Select programs to install.

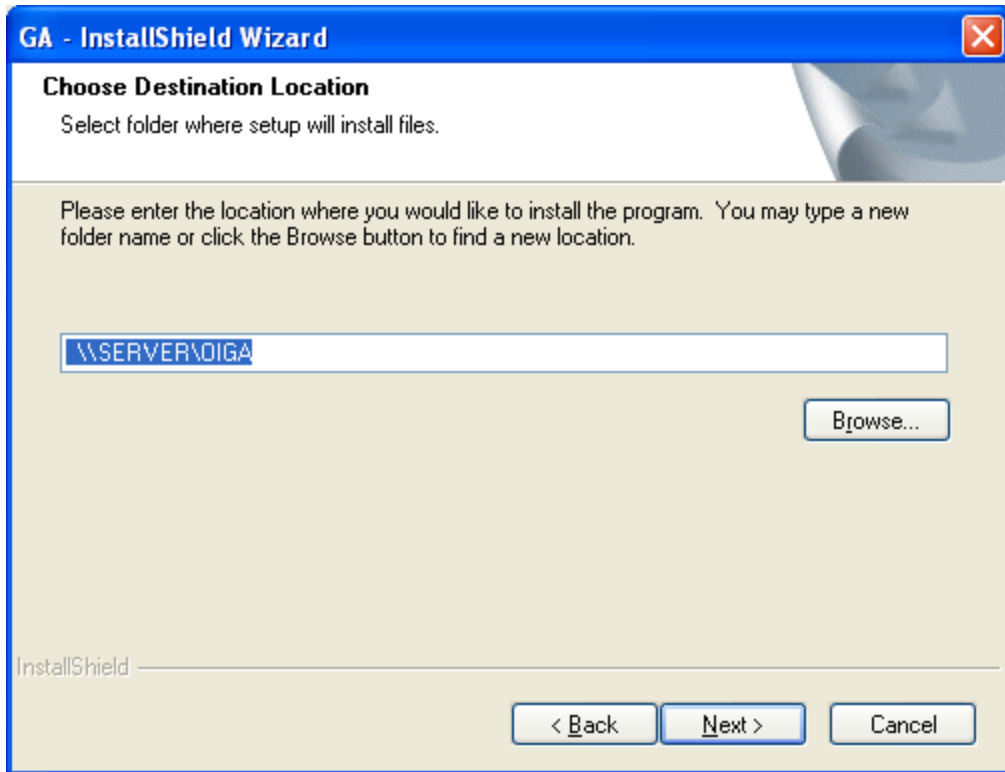
- **Server** – This option must be installed first and can be installed alone or on the same box and the Client and the database.
- **Client** – This option should be installed after server and can be installed on the same box as the Server or on a separate box.

These options can be installed during the Server and/or the Client installation or as standalone modules after the Server and/or Client installation.

- **Print Utility** – It is recommended that Print Utility be installed on a separate machine. Print Utility looks for letters on the database at intervals set by the administrator. If any are found, then the Print Utility will send out either letters or emails, depending upon the type of request.
- **Web Services** – It is recommended that Web Services be on its own machine but can be installed on the Client. Web Services gives OIGA the ability to send service orders out to providers. Users in OIGA can create service requests. Users will have the option to send now, which will utilize their workstations to send the requests or send later, which puts the requests in a queue that is batched at a later time.
- **OIDX** – The OIDX module requires internet access and does not have to be installed on the same machine as either the Server or the Client. It is highly recommended that only one instance of the OIDX module be installed.

4. For a Client only installation, select **Client and the associated options you want installed**. Uncheck the Server and OIDX options.

5. Click **Next**.



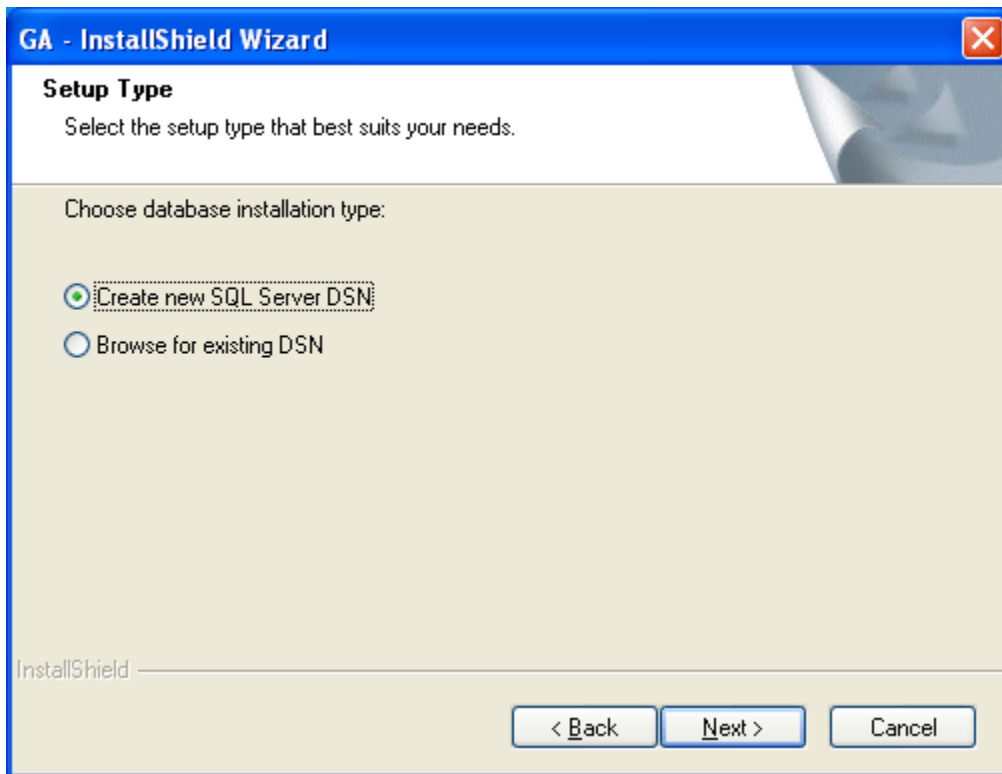
6. Select the **Destination Location**. The default destination will be displayed. This location must be changed to the location of the Server files. You can browse for the destination you need or enter the path directly
  - a. If the server where the Server files are loaded is a part of your network, browse for the location.
  - b. You may have to create a share if the Server files are not located on your network.

**NOTE**

*This step will point the Client to the Server file location. The Client acts as a pointer to the application and not as a separate program that interacts with the Server.*

7. Click **Next** to continue.

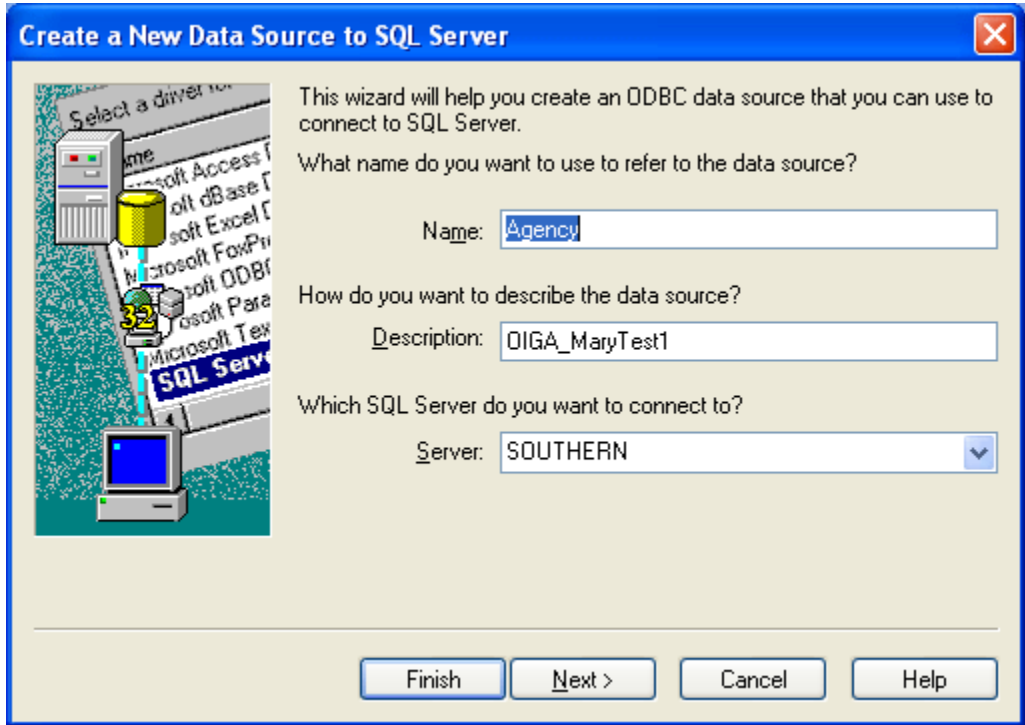
8. Select **DB Method**.



- a. **New Install** – Most new installs will have to select **Create New SQL Server DSN**. This option creates a new database connection. You must know the location of your database and be able to connect to it.
- b. **Upgrade** – If you are upgrading OIGA, you can select the **Browse for existing DSN**. Browse for existing DSN allows you to select a pre-existing DSN. See page 31.

9. Creating a **New DSN**.

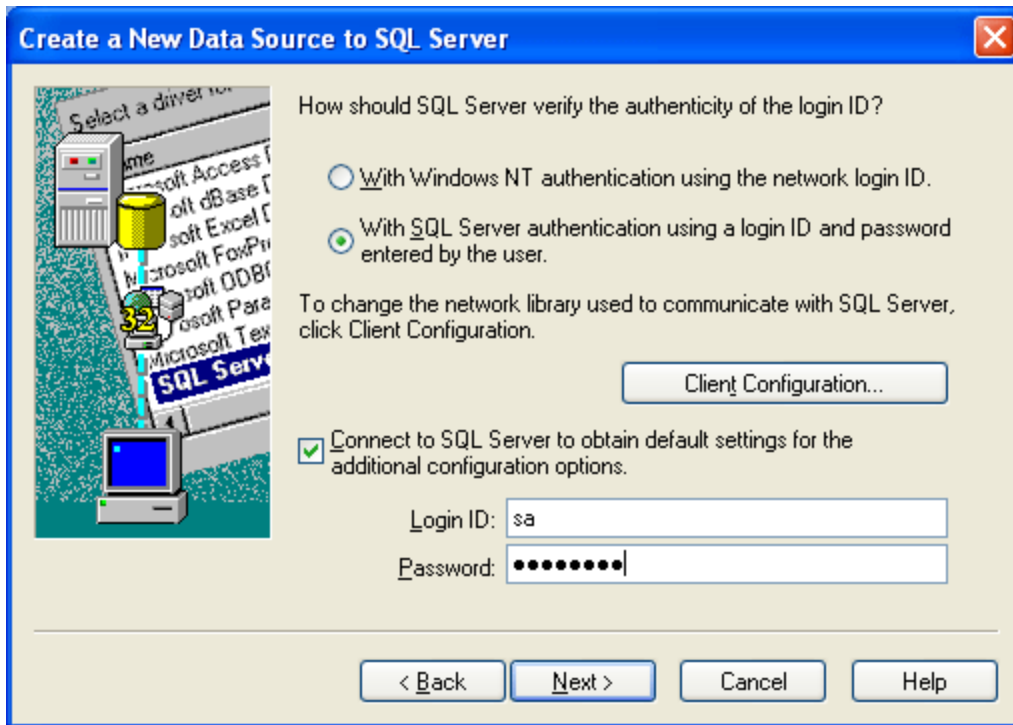
**NOTE** If you are upgrading or already have an existing DSN, please go to Step 18.



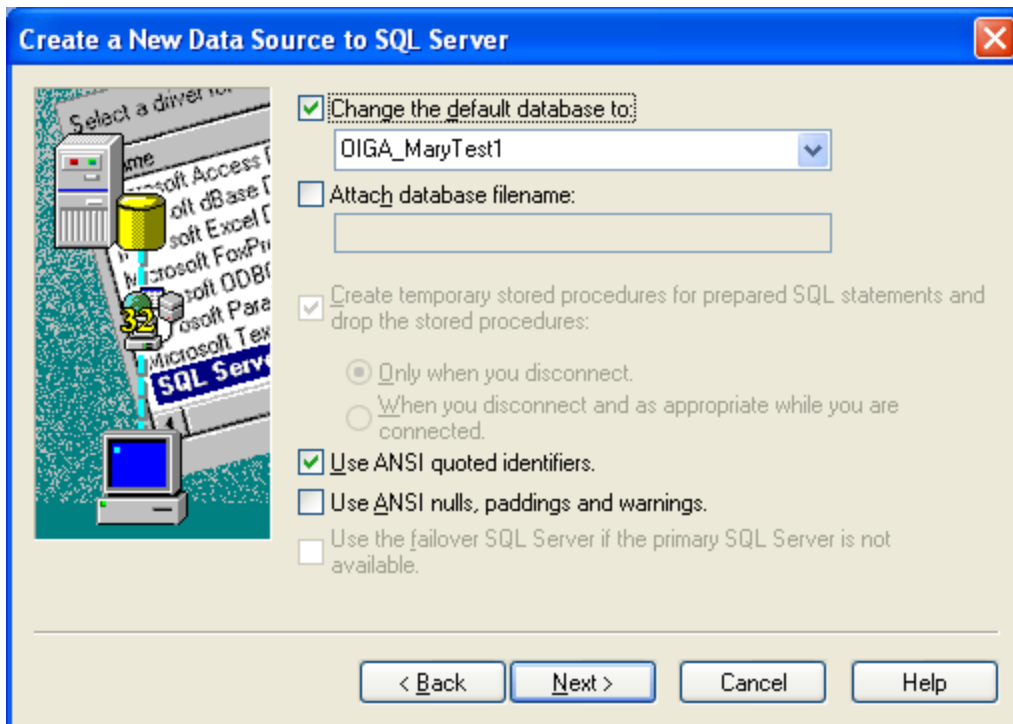
- a. The **Name** will default to **Agency**.
- b. Enter a **Description**.
- c. **Select the SQL Server** you want to connect to.

10. Click **Next** to continue.

11. The next screen is a default Windows screen for authentication. The options you have or will need to select will depend upon how security is set up in your company.



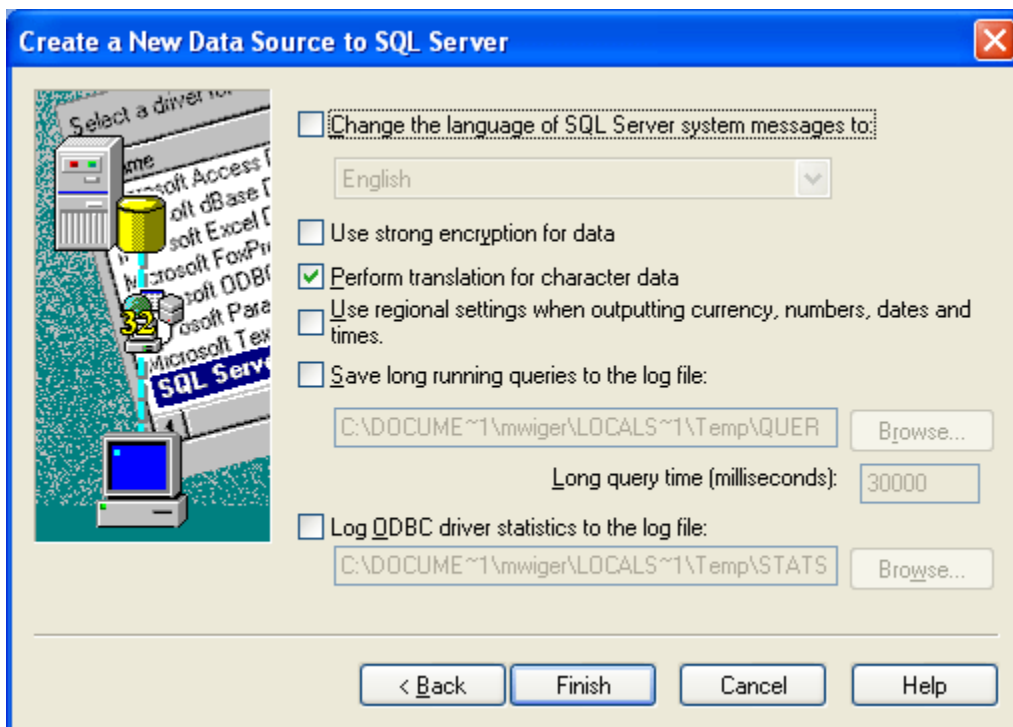
12. Click **Next** to continue.



13. The next default Windows screen may require you to **Change the default database** to the database you created.

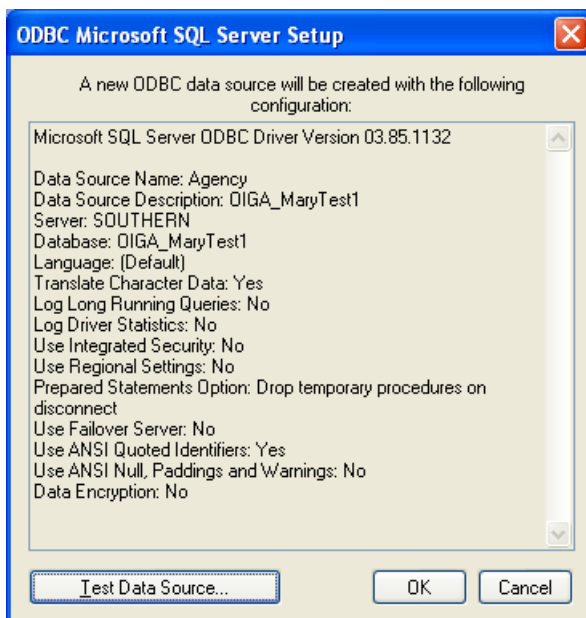
14. Uncheck the **Use ANSI nulls**, padding and warnings box.

15. Click **Next** to continue.



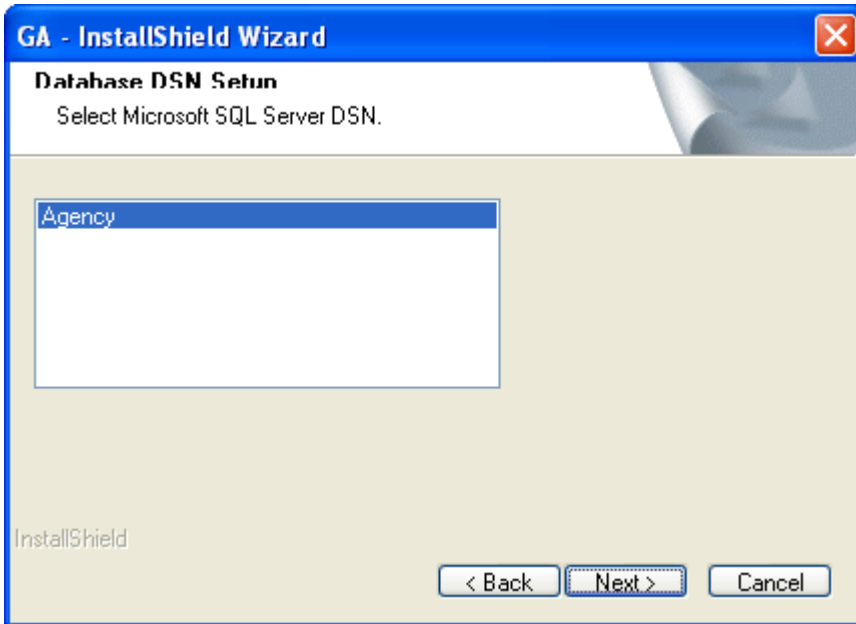
16. The next screen does not require any changes. Click **Finish** to continue.

The ODBC screen will be displayed. It is recommended that you test your data source.

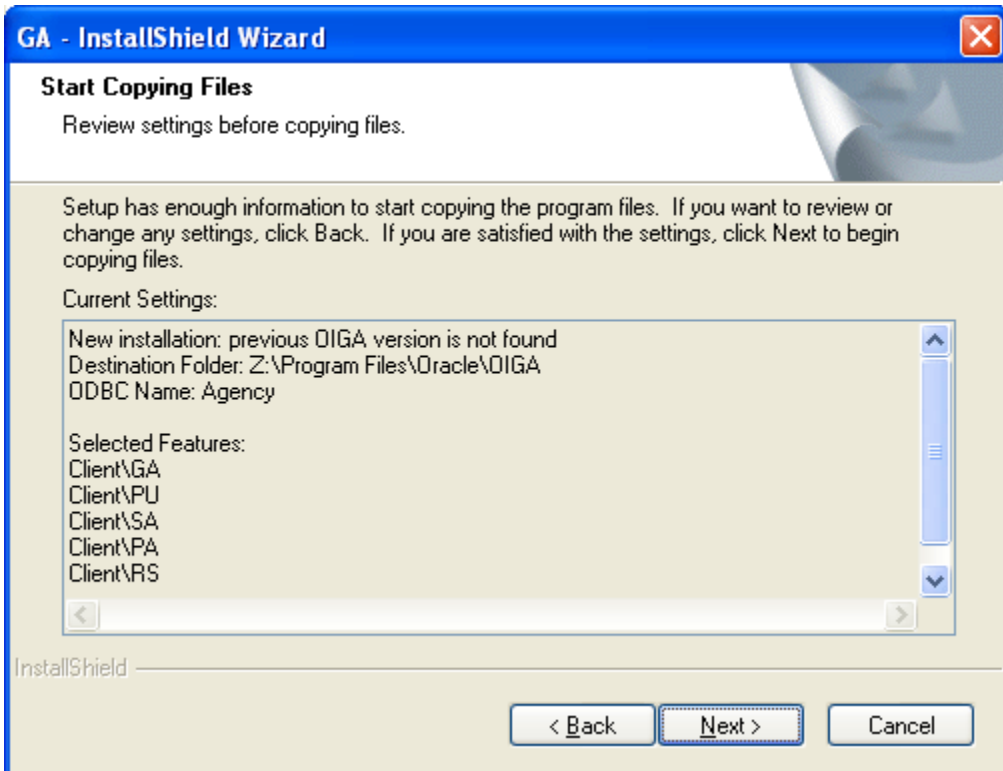


## Browse for Existing DSN

If you select the Browse for existing, you will be able to select the DSN option you need. Click **Next** to continue. Use this option if you are repairing or restoring OIGA.



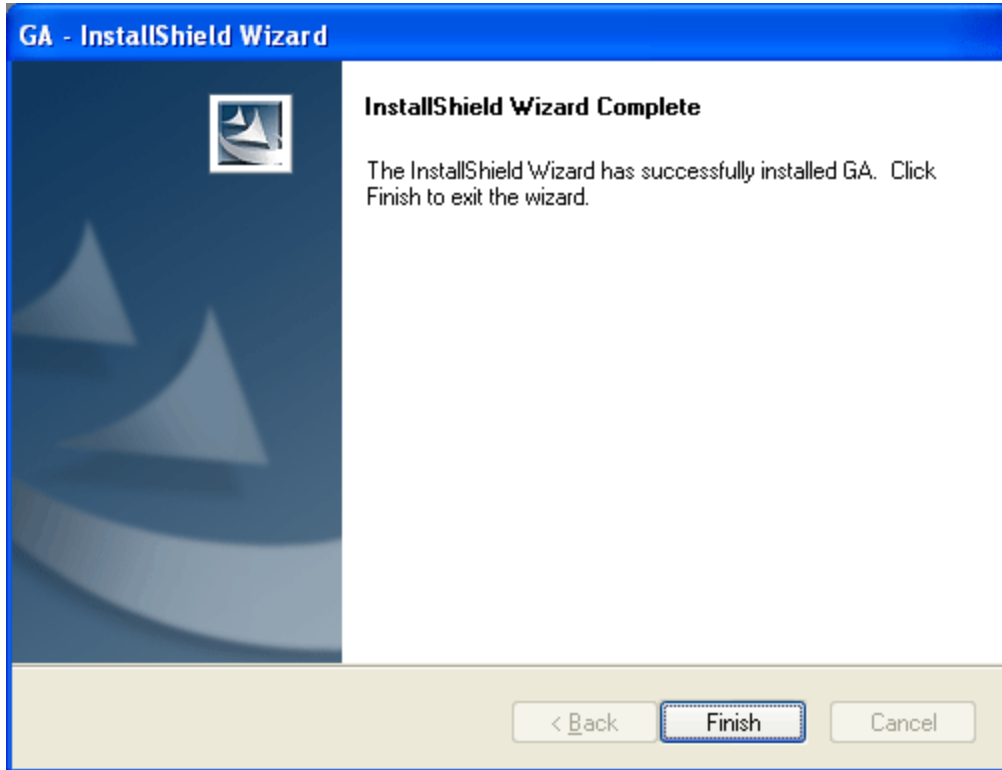
17. After setting up the DSN, the install will begin.



18. Click **Next** and the installation will begin.

The **Setup Status** will be displayed. When the installation is complete, the success screen will be displayed.

If any errors are encountered, an error screen will be displayed. Please call Support for assistance.



19. Click **Finish** to complete the install.

20. Icons for the installed features will be displayed on the desktop.



---

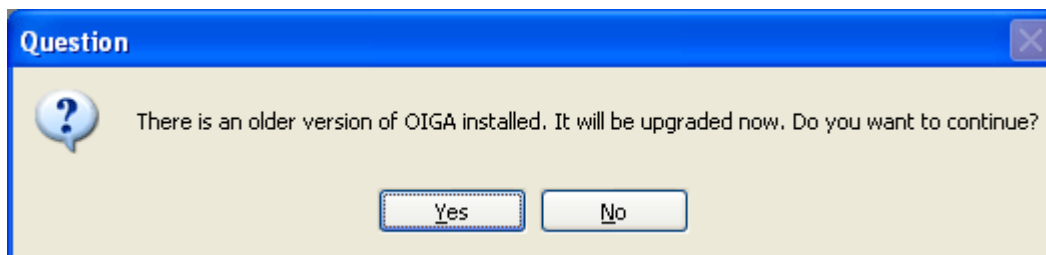
## Updates to Existing OIGA

Updates to an existing OIGA can be performed at any time. Updates will be posted on the E-Delivery site.

### Before performing an update, please check:

- No instances of GA can be open when updating. Make sure that there are no connections to the GA database. Database errors may occur if there are open connections. Close all open applications on machine where OIGA is being installed.
  - If you are upgrading to a newer version of OIGA, make a back up of your existing database and installation folder prior to installation.
  - Before beginning a Client installation or version upgrade, be sure that you have already upgraded the OIGA Server.
1. Unzip the download file you obtained from E-Delivery onto the machine where you want to install the update. Open the **OIGA** folder, where the installation file resides, and double-click the **OIGA8.1 .EXE** file.

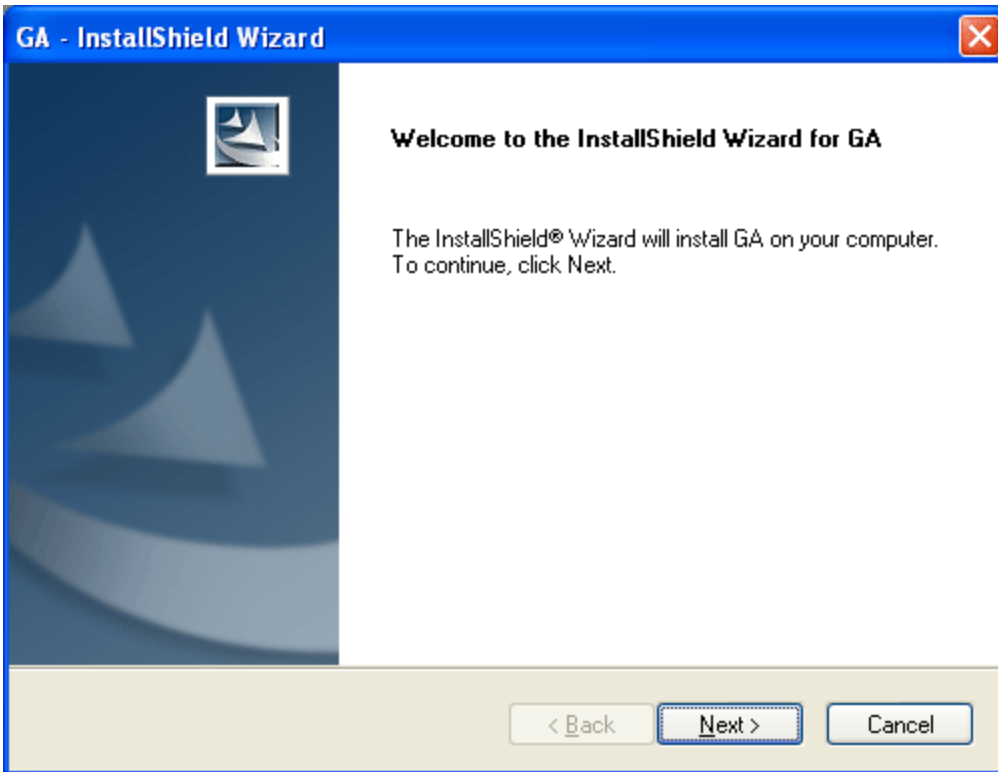
The OIGA installation program will begin.



The Welcome screen will be displayed.

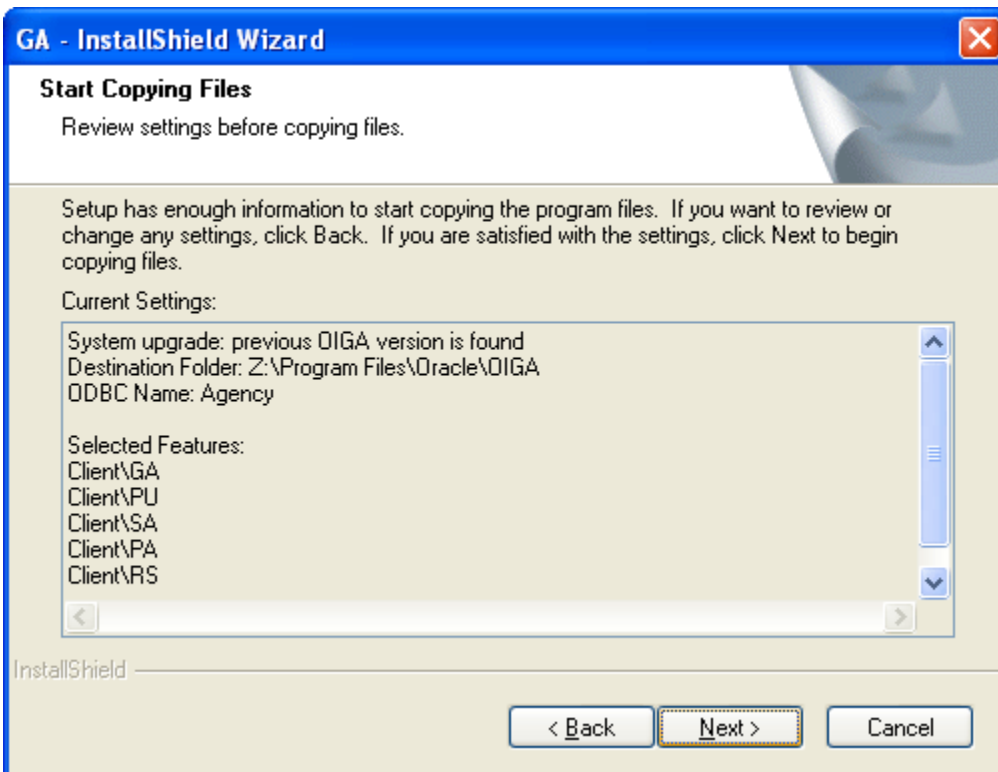
**NOTE**

*If you have a previous installation of GA on your computer, the wizard will prompt you to upgrade it. Click **Yes** to upgrade previous version.*

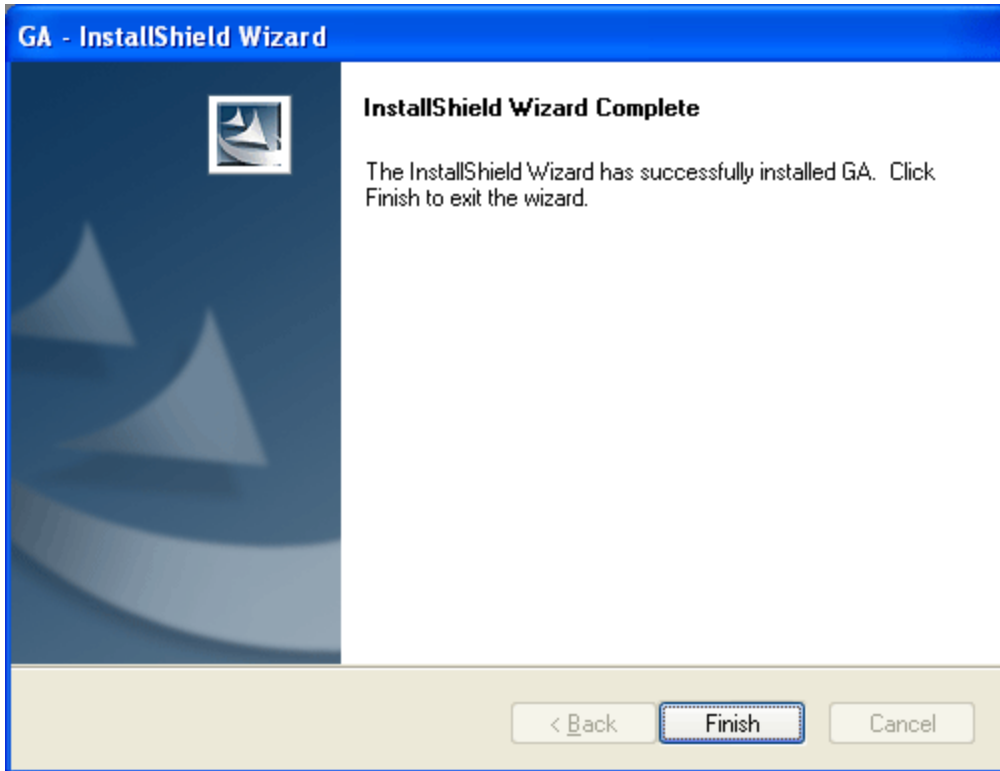


2. On the **WELCOME** screen, click **NEXT**.

The Install screen will be displayed if you are upgrading an existing instance of OIGA.

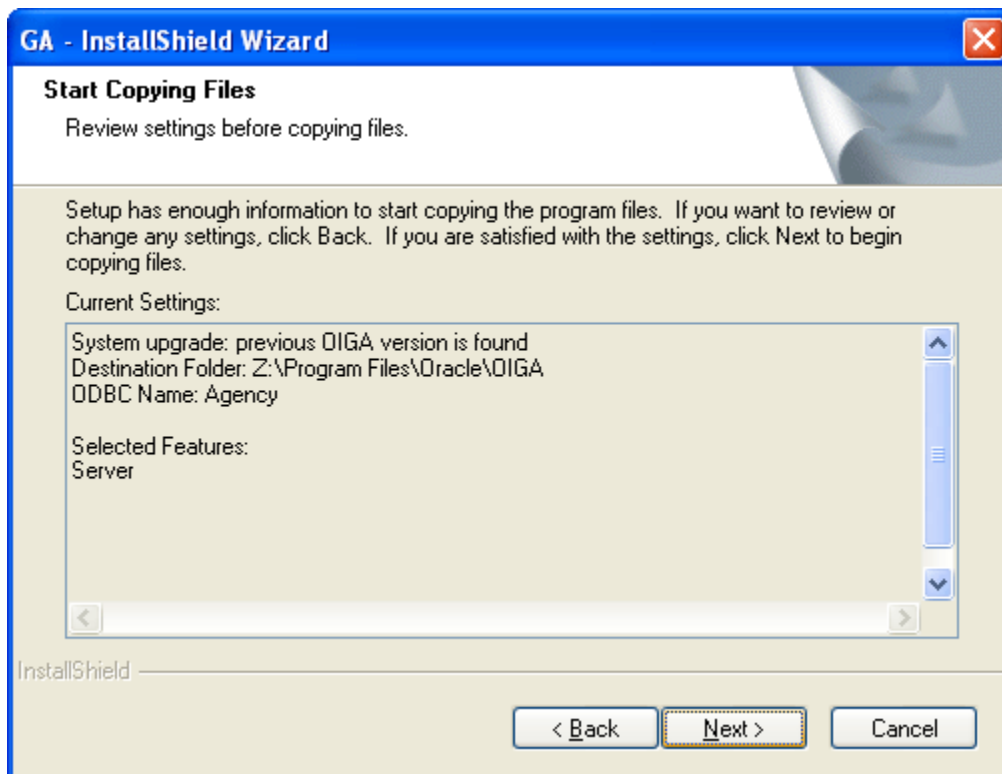


3. Review the updates. If the updates are correct, click **NEXT** to continue with the installation. "Cancel" stops the installation program.

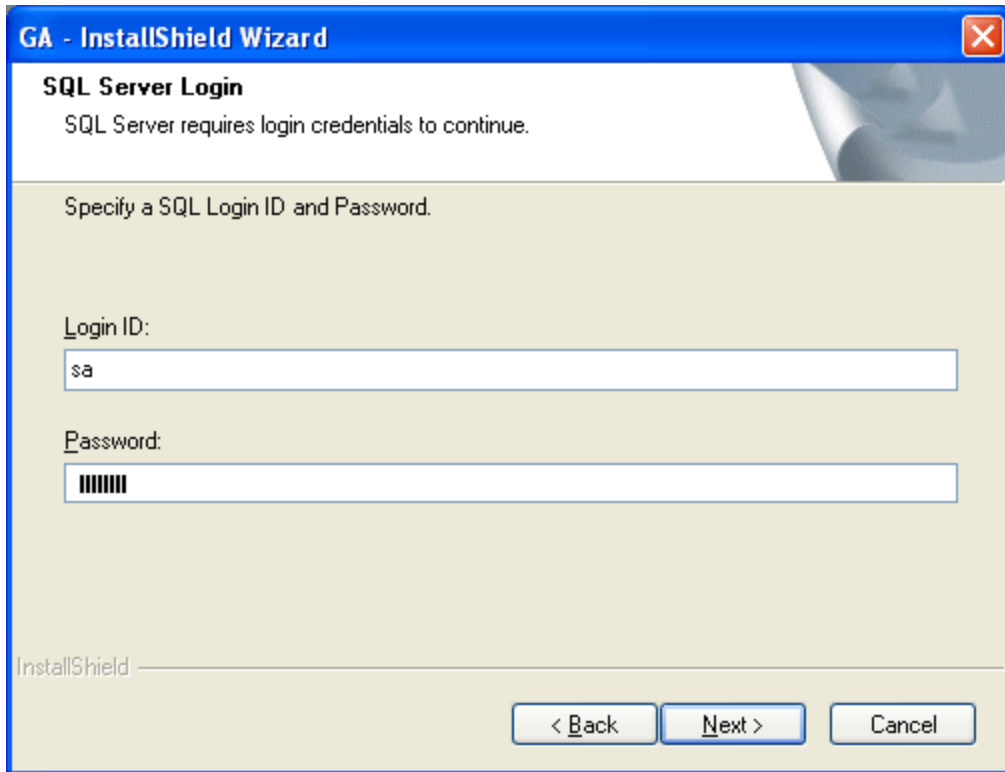


4. For a Client side update, the status will be displayed. When completed, click **Finish**.

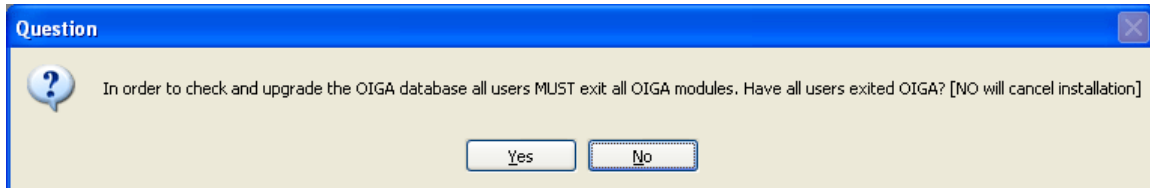
5. For a Server side update, the Install screen will be displayed if you are upgrading an existing instance of OIGA.



6. Review the updates. If the updates are correct, click **NEXT** to continue with the installation. "Cancel" stops the installation program.



7. Please enter sa **LOGIN** and **PASSWORD** to update the database and click **NEXT**.



8. Make sure that no users are connected to the database. Click **YES** to update your GA database.

|             |  |
|-------------|--|
| <b>NOTE</b> | <b><i>In order to run the updater, ALL users must have exited GA. If you click YES and there are GA programs open, your database could become corrupt.</i></b> |
|-------------|--|

9. The database updater will run the updates if there are no connections detected.

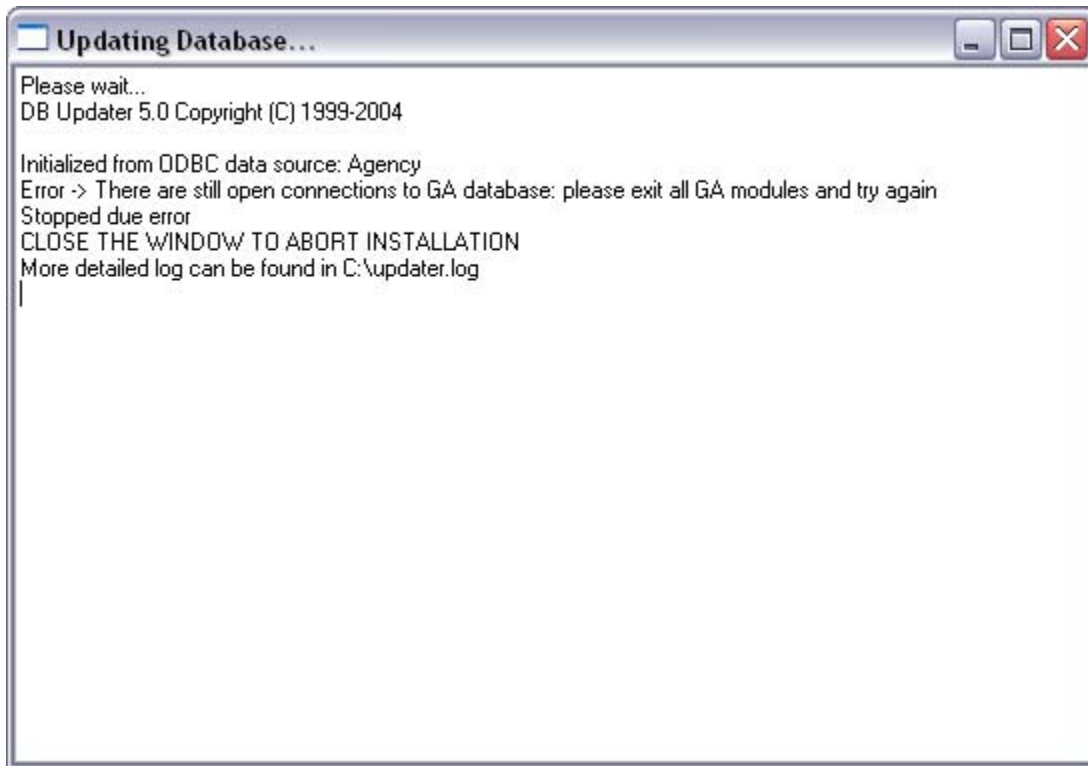
The **Setup Status** will be displayed. When the installation is complete, the success screen will be displayed.

If any errors are encountered, an error screen will be displayed. Please contact Support for assistance.

10. When completed, click **Finish**.

## Error Message

If there are any open connections to the OIGA database at the time of upgrade, you will see the following screen:



You must correct any errors before you can continue.

---

## OIDX Integration

In OIGA v8.1 the pending and commission data will be downloaded directly from OIDX. The data download will happen via PGP encrypted XML files over Secure FTP.

The OIDX Integration process is replacing the QuickView Hub sync process. The QuickView database will no longer be needed. For safety reasons, it is recommended that you archive the QuickView database for a selected length of time.

**NOTE** *It is highly recommended to have only one instance of the OIDX module.*

---

### Some of the Benefits

The Commission and Pending data will be available to view in the screen in OIGA v8.1. QuickView no longer needs to be maintained. Syncing with the HUB is not needed. Only one database, the OIGA, needs to be hosted. Users will have access to OIDX data and OIGA data in one place. Both Commission and Pending data can be integrated to the OIGA to bring over updates to cases and to reconcile the commission statements.

---

### Required Items for OIDX Data Download

Prior to integration, please make sure the following items are in place and ready for use.

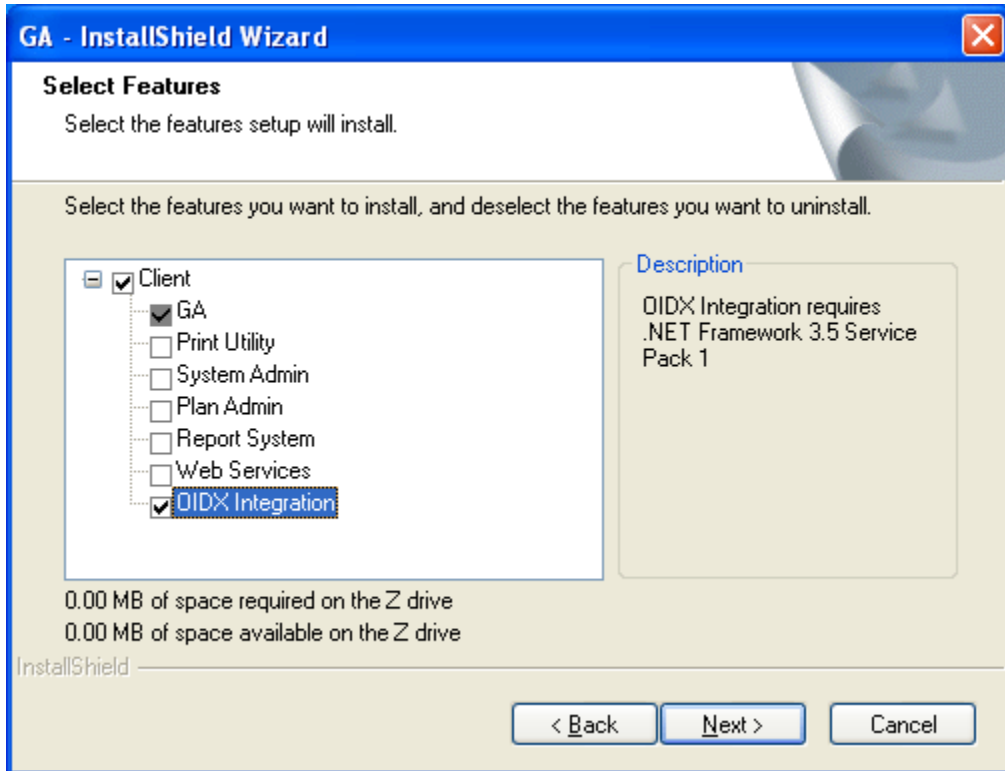
1. Hub Login. If you do not have a Hub Login, please contact QuickView Support.
2. Request an Oracle Secure Client FTP.
3. Make sure you have .NET Framework 3.5 Service Pack 1 installed.
4. PGP decrypting client and a public PGP Key. Oracle Insurance has tested decryption with a PGP client from <http://www.pgpi.org/>. You may choose to use any PGP Key that you want. Your public PGP key will be added to the OIDX PGP Key Ring.
5. Your Schedule – you will need to know how often updates are required.

**NOTE** *OIGA Professional Services offers assistance with the setup and installation of OIDX. Please contact you Oracle Insurance Sales Representative for further information.*

## Set Up

---

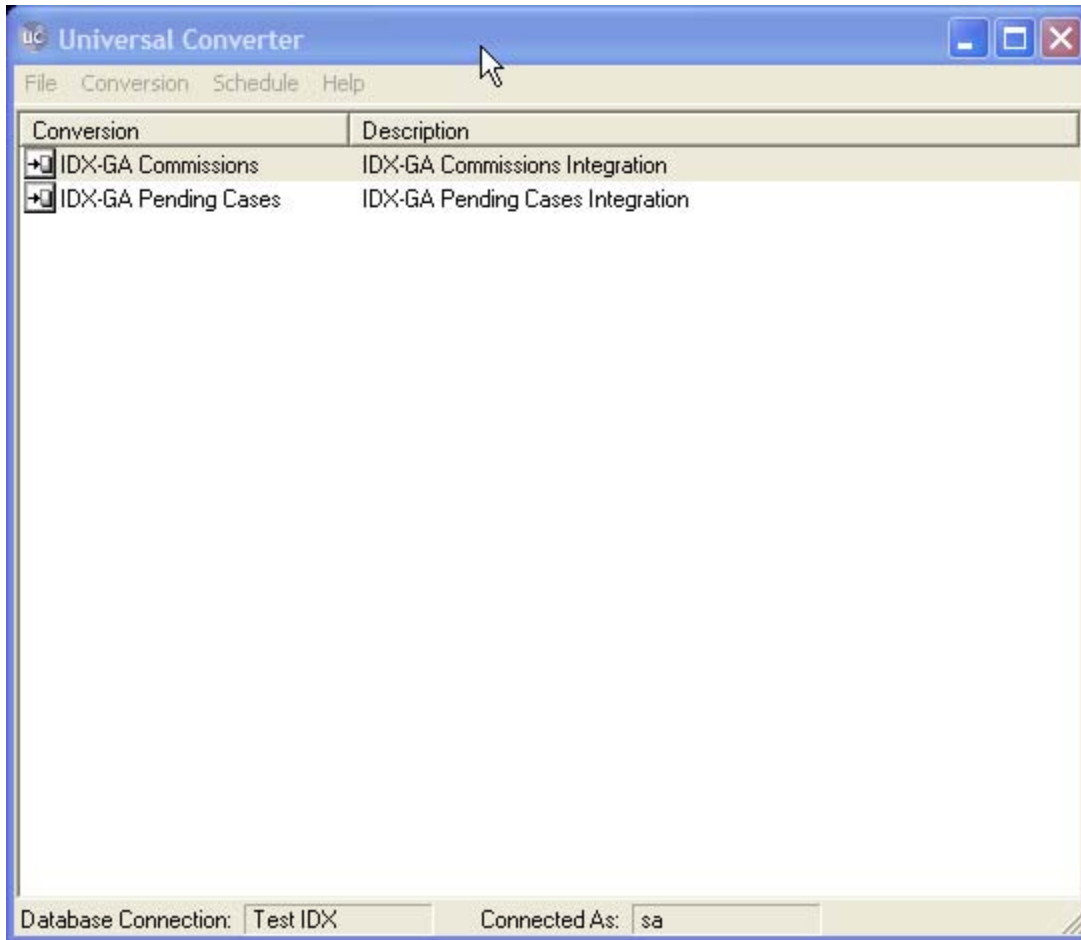
In order to set up a standalone machine or server to download data from OIDX during the OIGA installation, select the “OIDX Integration” under the “Client” tree.



.NET Framework 3.5 SP1 is a requirement. If the installation does not find this component, the installation will stop.

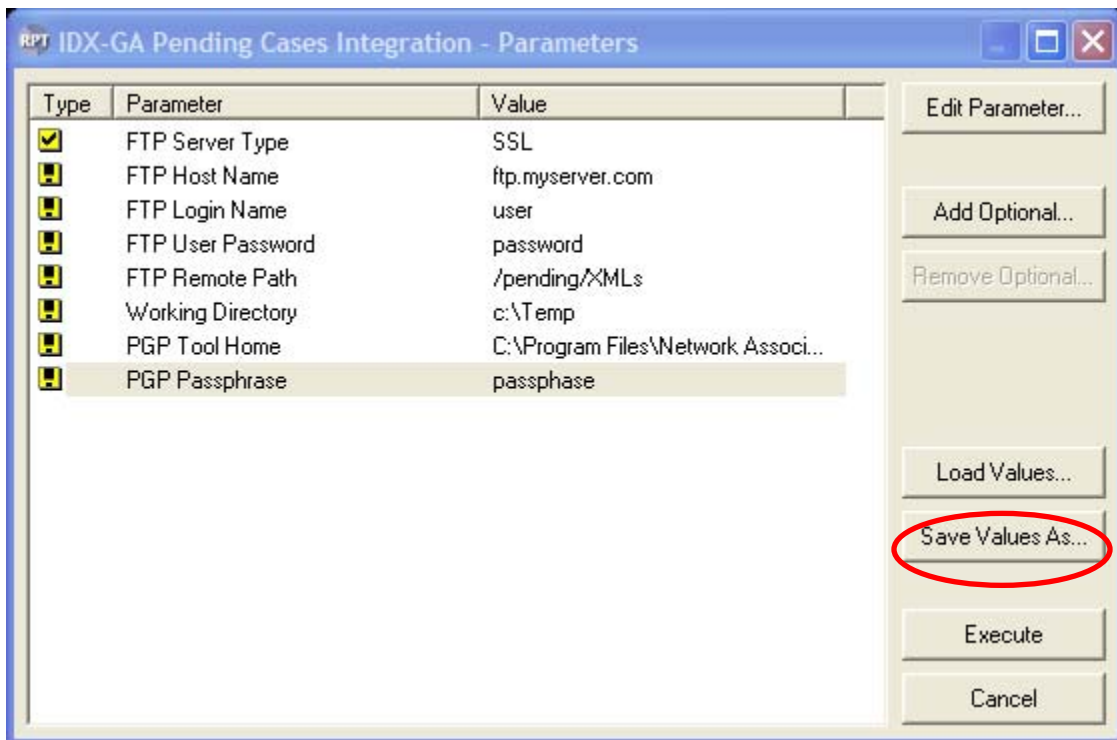


The OIDX Integration tool/module can be accessed from the OIDX Integration icon. There are two data types that can be downloaded to OIGA: **Commission and Pending data updates.**



To set up OIDX Integration, the parameters below need to be specified:

- **FTP Server Type** – SSL
- **FTP Host Name** – Will be Provided Oracle Insurance
- **FTP Login Name** – Will be provided by Oracle Insurance
- **FTP User Password** – Will be provided by Oracle Insurance
- **FTP Remote Path** – Will be provided by Oracle Insurance
- **Working Directory** – Location on a local hard drive where XML files will be stored.
- **PGP Tool Home** – Installation location of the PGP Tool, for example “C:\Program Files\PGPTool\”
- **PGP Passphrase** – Your PGP passphrase



1. Once all the parameters are set up click on the “**Save Values As**” button to save your settings.
2. Click on the **Execute** button to start data download process from OIDX.
3. The Commission and Pending data integrations can also be scheduled to be run automatically.

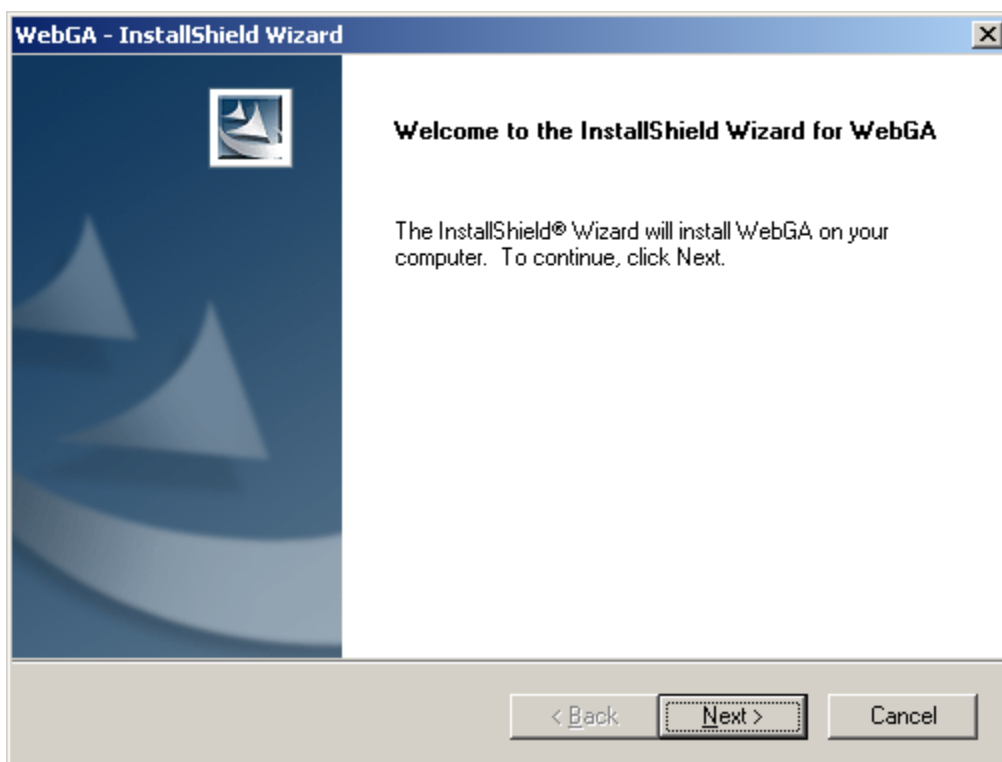
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## Installing WebGA

Oracle Insurance WebGA is a web based tool that allows processing cases and viewing Agent or Agency licensing / contracting and production numbers. WebGA can be installed anytime after OIGA. it is recommended that WebGA be installed on a dedicated web server separate from the OIGA installation files. The following points should be considered before installation:

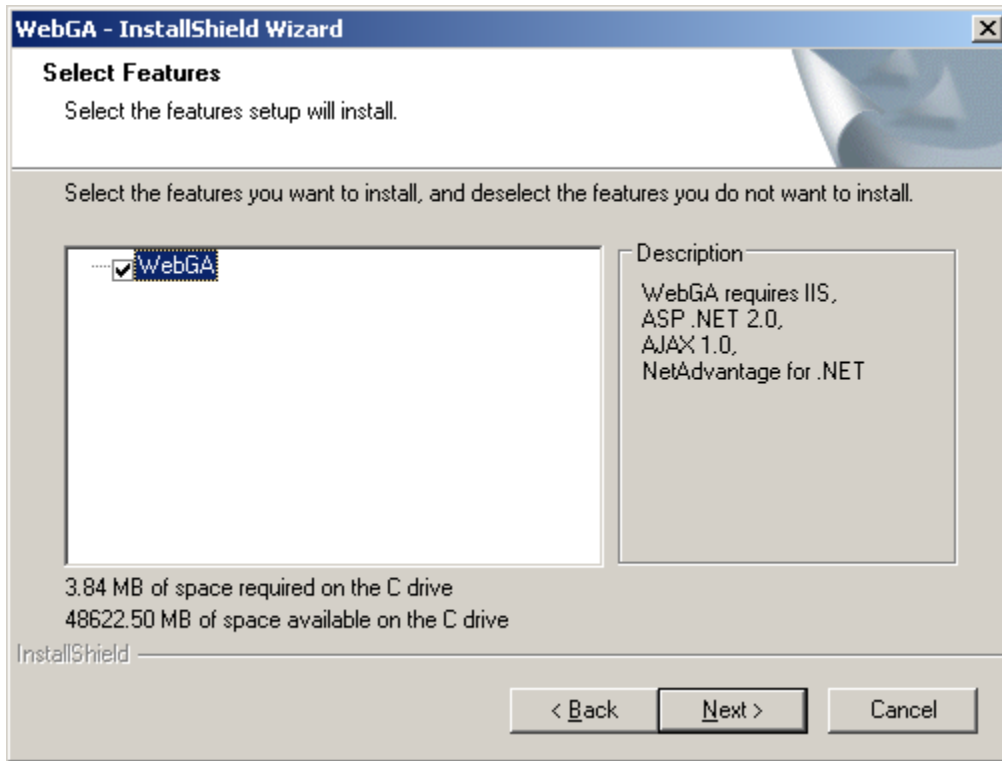
- IIS is required
  - Microsoft .NET 2.0 is required
  - Ajax for .NET 2.0 is required
  - Infargistics NetAdvantage\_ .NET\_20072\_CLR20 is required
  - WebGa is compatible with Microsoft Internet Explorer 6 and 7 however, Microsoft Internet Explorer 7 is recommended.
  - If you are going to publish to the internet, it is strongly recommended that HTTPS be used instead of HTTP.
1. Unzip the download file you obtained from E-Delivery onto the machine where you want to install the update. Open the **WebGA** folder, where the installation file resides, and double-click the **WEBGA8.1 .EXE** file.

**The WebGA installation program will begin.**

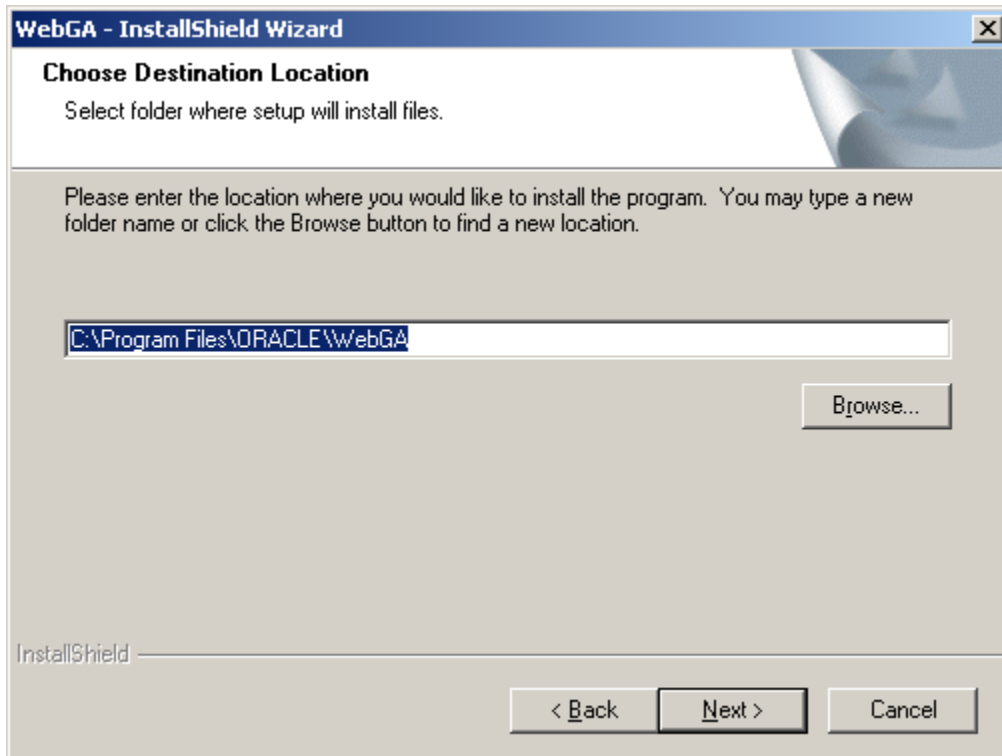


2. Click **Next** to continue.

3. **Select the features** you want to install.

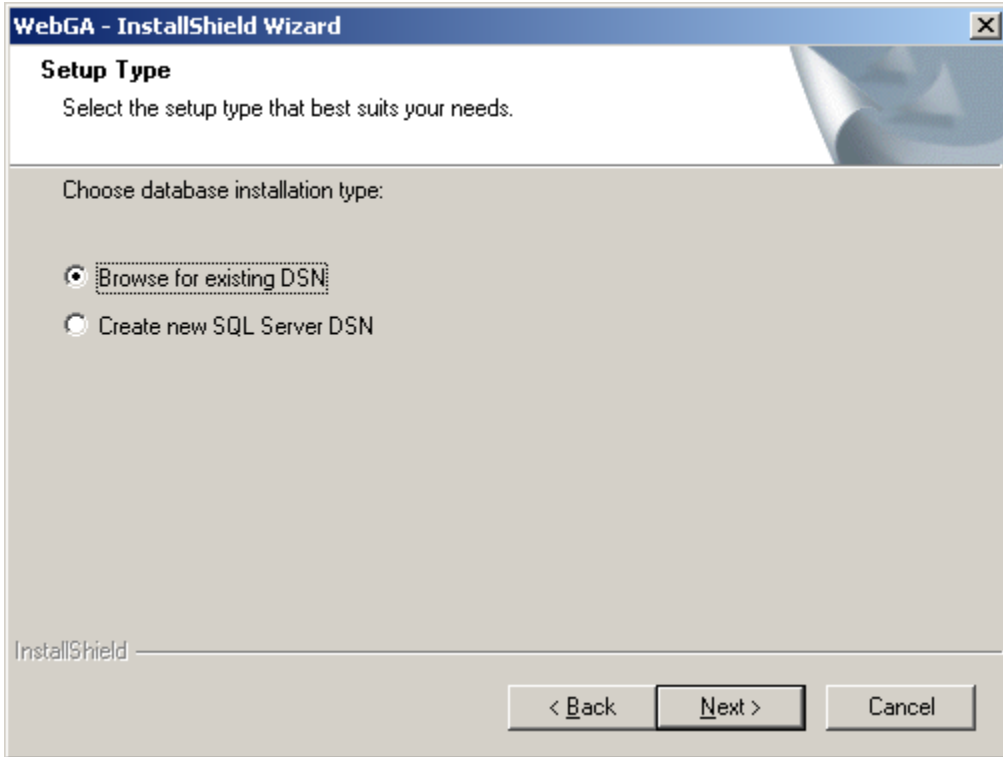


4. Click **Next**.

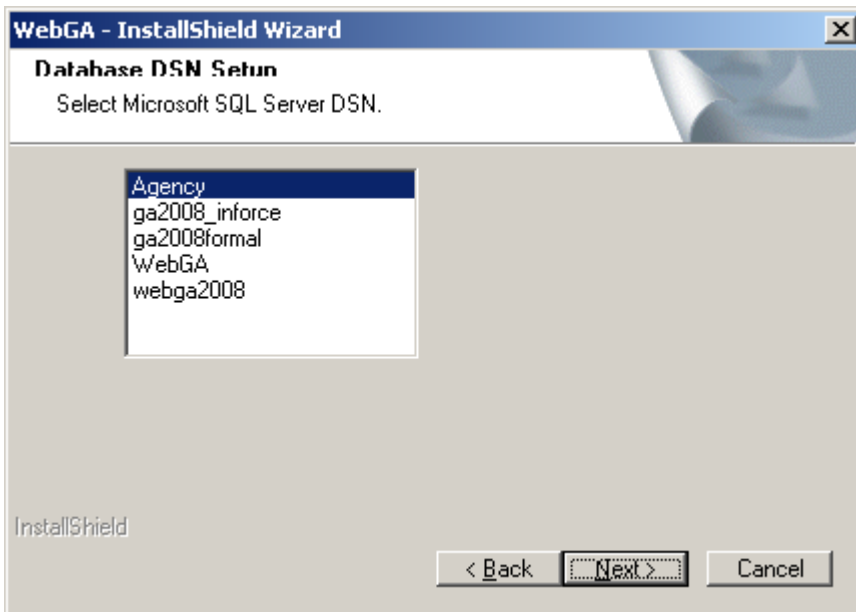


5. **Select the location** where WebGA is to be installed.

6. Select the **DB Method**. Select **Browse for existing DSN**. This option will allow you to select a pre-existing DSN. You should not have to create a new DSN connection. WebGA should be installed after OIGA and will utilize the same database. If you need to create a new DSN, see page 17.

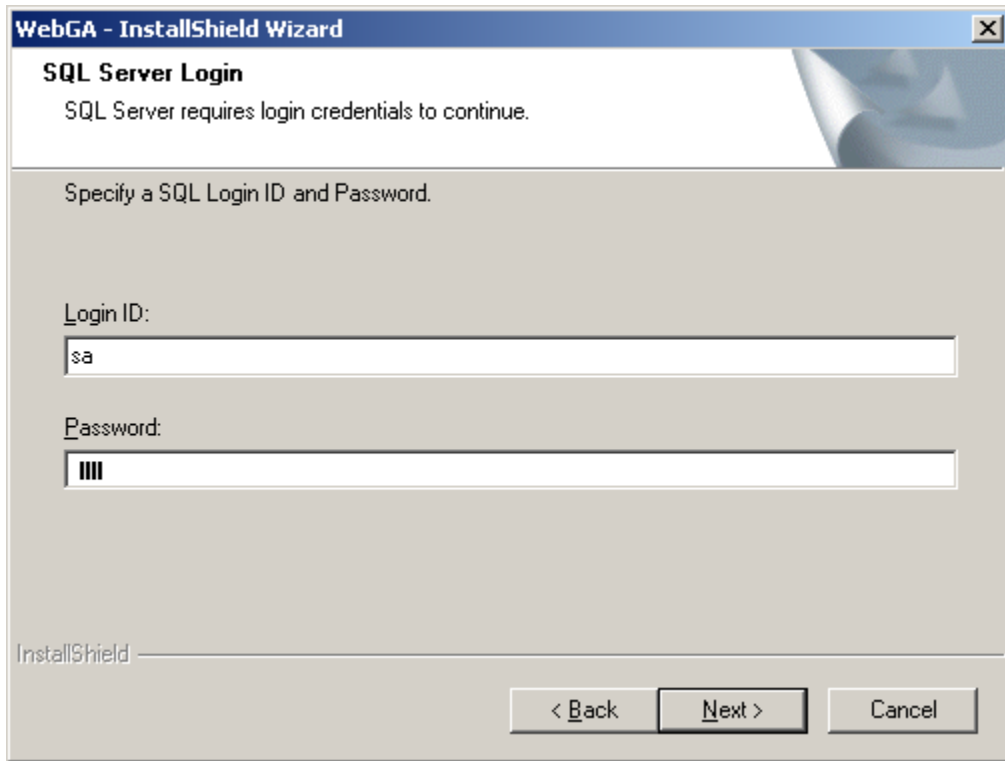


7. Click **Next** to continue.
8. Choose the same **DSN as OIGA**.

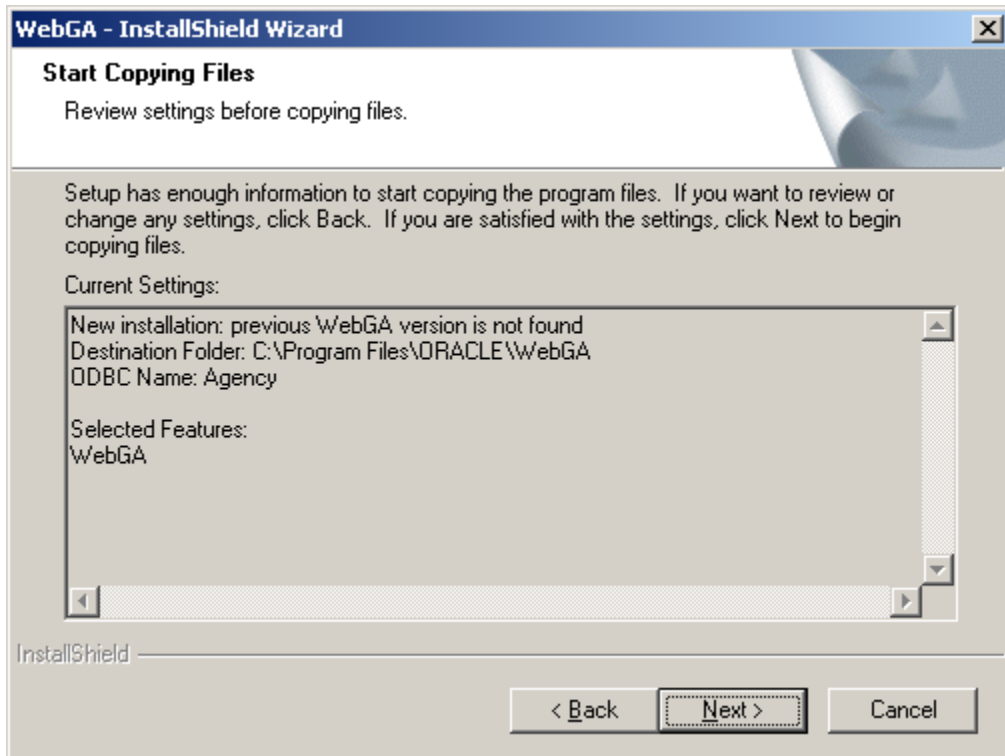


9. Click **Next** to continue.

10. You may be required to log into SQL Server. It is recommended that you use the sa user.

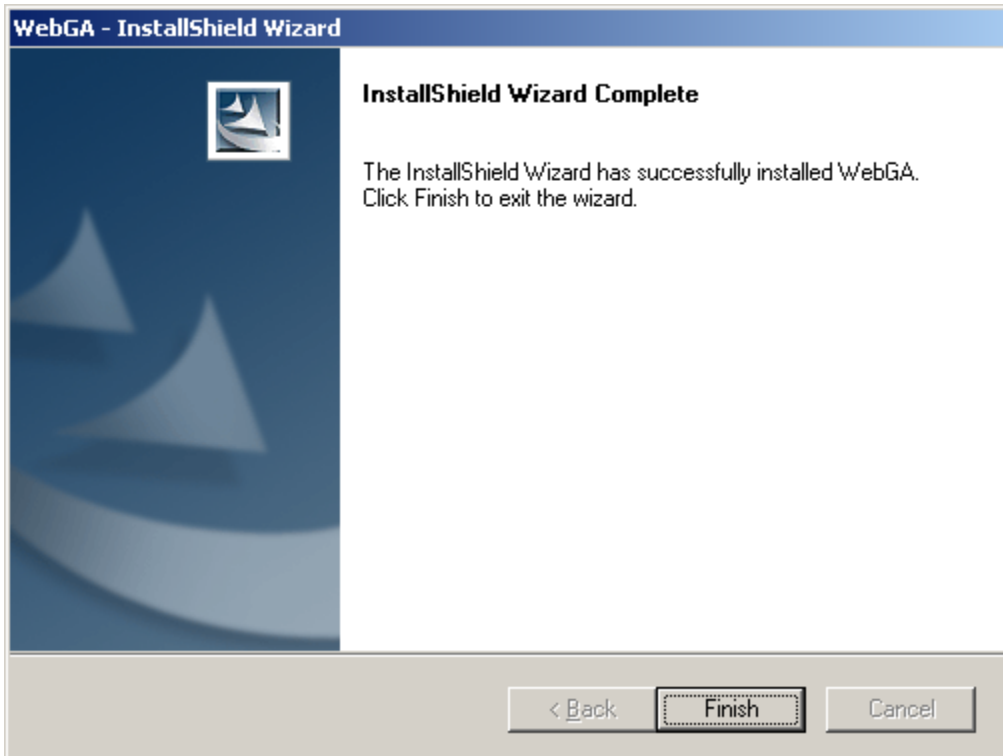
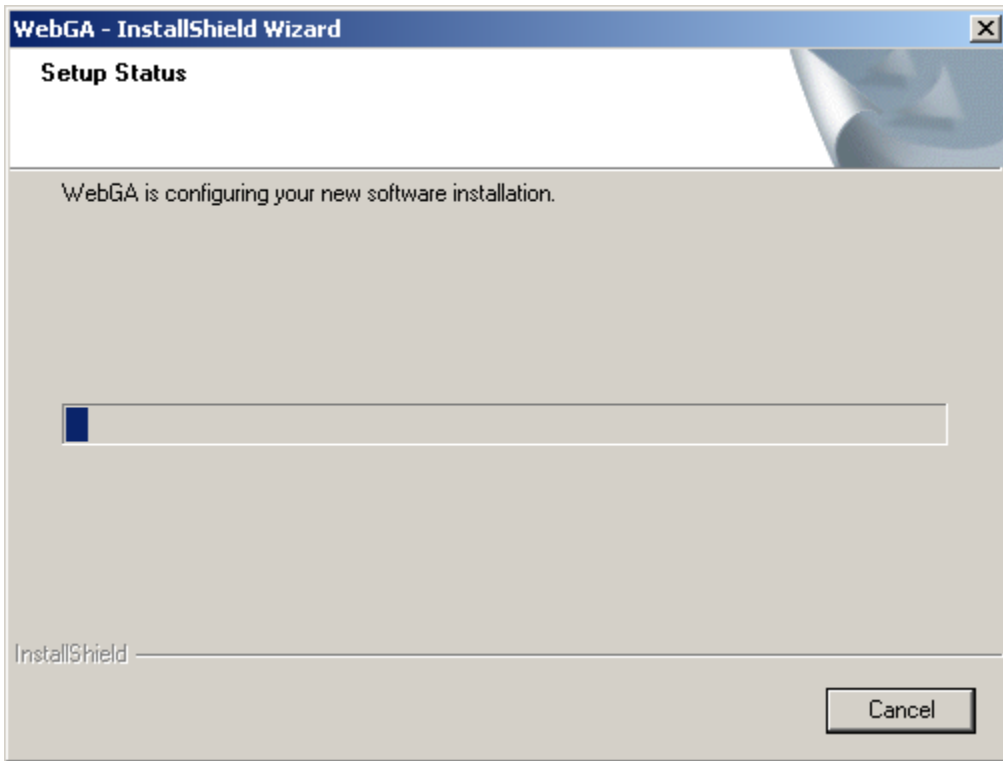


11. Click **Next**.



12. The installation will begin.

13. The status will be displayed as it progresses.



14. Click **Finish** to complete the install.

15. After WebGA has finished installing, go to the install folder, for example, C:\Program Files\Oracle\WebGA or wherever you have chosen to install WebGA and add to the folder security full control for user **ASP.NET** user.

### **WebGA Themes**

WebGA has of two themes, navy and olive. Navy is the default. The olive theme can be implemented by the following method:

1. Enter the Web.config file.
2. Find Pages>Theme.
3. Change navy to olive.

### **Accessing WebGA**

- After installation, WebGA can be accessed internally from, <http://webservername/WebGA/LoginForm.aspx>.
- External access can be setup through a secure connection.
- To login, use the same GA login and password.



## First Time Users

### Setting Up Your OIGA System for the First Time

If you are installing OIGA for the first time, there is information available to help you set up your system.

1. From any module in **OIGA**, on the **HELP** menu, click **OPEN HELP**.

Your Internet browser will open with the Help System Welcome screen.



#### OIGA Help System Welcome screen

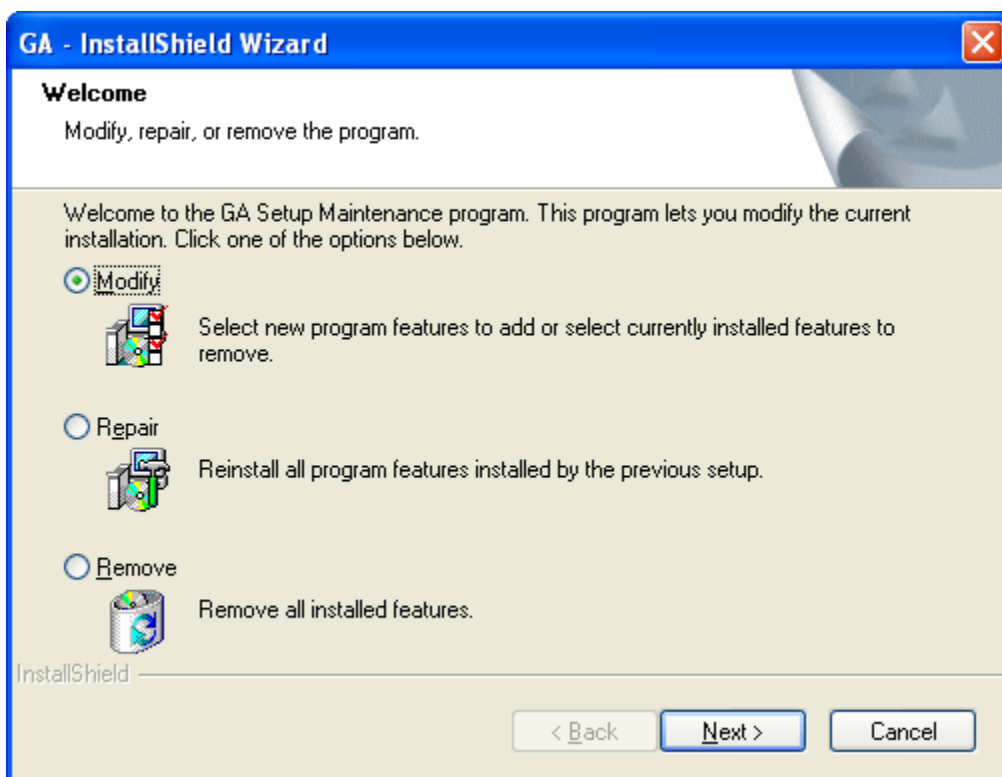
2. On the left side of the screen the table of contents is listed. Oracle Insurance recommends that you read the following topics:
  - **Overview of OIGA**
  - **Setting Up OIGA for the First Time**

The help system is organized into sections which provide information and procedures for working in each OIGA module. There are also sections that relate to Integration, managing correspondence, the GA Report System and more. Use the Help System to get familiarized with the GA system and to find answers to any questions you may have about GA.

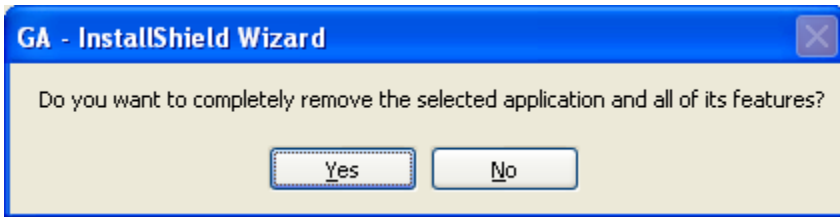
## Removing OIGA

OIGA can be removed at any time. If you remove the Server files, be aware that other users will not be able to access the files.

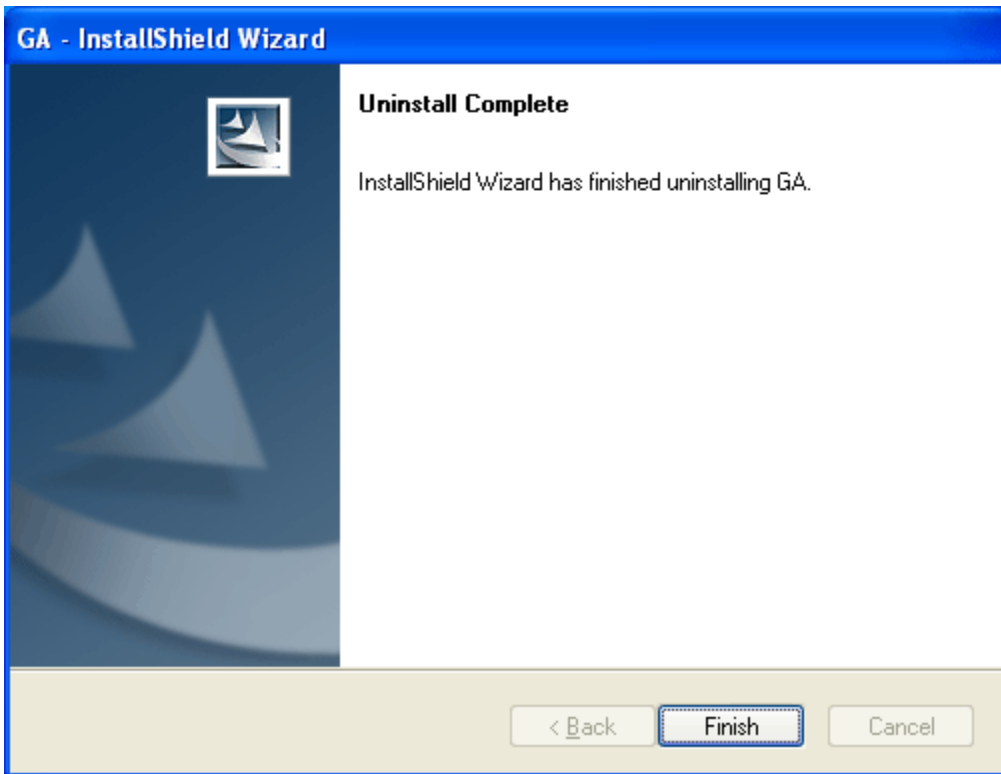
1. To remove OIGA, click the **Installation**. A Modify, Repair, or Remove screen will be displayed. If there is not enough room on the hard drive, the installation will close down. In that case, you must go to the Add/Remove programs on Control Panel.



2. Choose the option you need.
  - a. **Modify** will allow you to modify the application.
  - b. **Repair** will re-load the application.
  - c. **Remove** will remove the application.
3. Select **Remove**.
4. Click **Next**. A warning message will be displayed. Click **Yes** to remove the program.



The status will be displayed as it progresses.



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

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

If you need additional assistance, please contact My Oracle Support at <http://metalink.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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