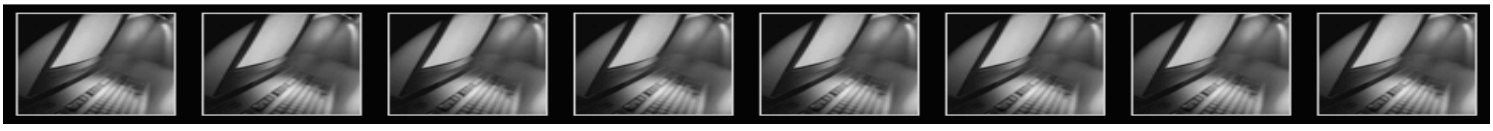
ORACLE
INSURANCE

Oracle Insurance Policy Administration: Installation & Configuration

Oracle Insurance Policy Administration, Rules Palette Web Application Utility and the Rules Palette
Release 9.0.1.0.0
August 2009

E15494-01



Oracle® Insurance Policy Administration

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Introduction

The Oracle Insurance Policy Administration application and the Oracle Insurance Rules Palette form a solution for configuring, managing and processing policy data. Both applications, along with the Rules Palette Web Application Utility, must be installed and then configured to work together. This install guide will cover the steps necessary to complete the installation and then the integration of the three applications.

There are four stages to the installation process. First, you will install and set-up the database that will be used with the Oracle Insurance Policy Administration and Rules Palette applications. Next, you will install Oracle Insurance Policy Administration, which includes establishing the server location through the installation of WebSphere, and establishing all necessary database connections. Then you will install and set-up the Rules Palette Web Application Utility. Finally, you will install and set-up the Rules Palette application.

Database Installation

Prerequisites

- Must be an Oracle 11G or MS SQL Server 2005 database.
- Any compatible operating system.
- Database driver
    - Oracle database: **ojdbc14.jar**. This file is included in the .zip file you downloaded from E-Delivery. Open the OIPA_V9GA folder. It is in the ext jar .zip file.
    - SQL Server database: download the **jtds.jar** file
        a. Download **jtds** from the following site: http://sourceforge.net/projects/jtds/.
        b. Click **Download** on the top menu bar.
        c. Click the **download** link for jtds (release 1.2.2).
        d. Select the **jtds-1.2.2-dist.zip** file. Save the download .zip file to the lib directory you created (i.e., ../opt/oracle/lib).
        e. Open the downloaded .zip file and extract the file **jtds-1.2.2** from the root of the .zip file.
        f. Rename the file **jtds.jar**.

Steps to Install the Database

1. Install desired database according to the vendor's instructions.

   Note: Oracle database must use a Unicode character set defined at database creation.

2. Complete the required post installation tasks. Tasks for both Oracle databases and SQL Server databases are listed below:
   - **Oracle databases** require the following post installation tasks:
     a. Set the database for case insensitive searches and create the User.
        - From sqlplus logged in as a user with DBA privileges execute the following commands:
          1. **Alter system set NLS_COMP=LINGUISTIC scope=spfile;**
          2. **Alter system set NLS_SORT=BINARY_CI scope=spfile;**
          3. **Shutdown immediate;**

     Note: Shutdown will stop and bring down the database. Only run this when all users have safely exited the system.

        - Startup;
        - Create Oracle Insurance Policy Administration and IVS users
          1. **Create user <Username> identified by <password> Default_tablespace users;**
          2. **Grant connect, resource to <Username>;**
        - Exit;

     b. Now import the supplied data:
        - **imp <OIPA Username>/<password> file=oipa_pas_v9_0.dmp full=yes**
        - **imp <IVS Username>/<password> file=oipa_ivs_v9_0.dmp full=yes**
   - **SQL Server 2005 databases** require the following post installation tasks:
     a. Open MS SQL Server Enterprise manager.
     b. Create a new database.
     c. Restore from the supplied MS SQL Server backup to the new database.

You have successfully completed the installation process for the database. The next step is to install the Oracle Insurance Policy Administration application.

Oracle Insurance Policy Administration Installation

Prerequisites

Before beginning the following installation steps, you must have the following components:

- A server with Windows Enterprise 2003 R2.sp2.
- WebSphere Network Deployment Manager Version 6.1.0.21. This can be downloaded from the IBM website or from a CD provided by IBM.
- Administrative rights to the server.
- PASJava.war file. This file can be downloaded from E-Delivery when you select the Oracle Insurance Application product pack and the platform you are using. You will see the **Oracle Insurance Policy Administration** link. Select the **download** button. Extract the files and open the OIPA_V9GA folder. Next, open the folder for the type of database you will be using (Oracle or SQL Server) and locate the PASJava.war file.
- Properties files - These files are included in the E-Delivery download. Open the OIPA_V9GA folder. Next, open the folder for the type of database you will be using (Oracle or SQL Server). You will see a properties folder, which contains all of the properties files.
- .jar files – These files are included in the E-Delivery download. Open the OIPA_V9GA folder. Next, open the folder for the type of database you will be using (Oracle or SQL Server). You will see a .zip file for ext .jars. Extract the files.

Server Set-up

IMPORTANT: These installation instructions are written with the assumption that you are using an Oracle database. If you are using SQL Server 2005, then the steps will vary slightly.

Create a Directory for the Configuration files

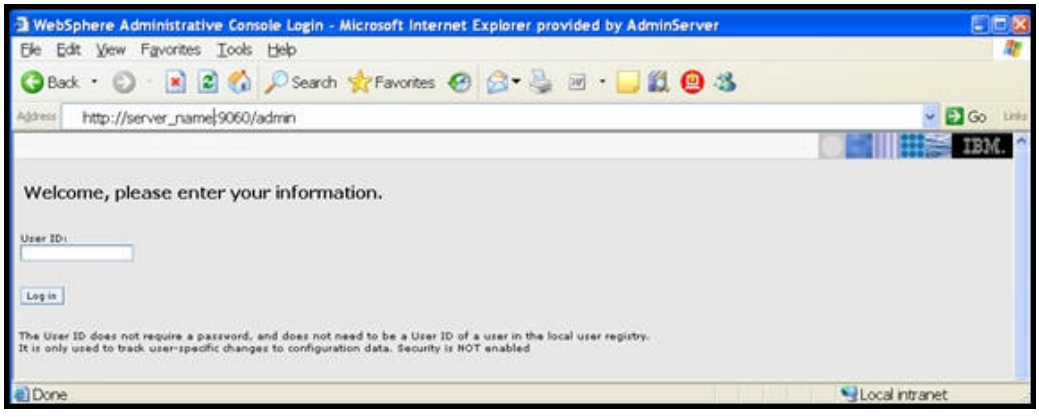
1. Create a directory on the WebSphere installation machine to store configuration files for the Oracle Insurance Policy Administration V9 system (i.e., /opt/oracle/server1).
2. Copy into this folder the following files from the .zip file you downloaded from E-Delivery:
    - PASJava.war
    - AdminServerMessages.properties – error message
    - APEMessages.properties - error message
    - MathMessages.properties - error message
    - PAS.properties – contains various application settings
    - PASMessages.properties - error message
    - ResourceBundleMessages.properties - error message
    - SREMessages.properties - error message
    - SystemMessages_en.properties - error message
    - UtlMessages.properties - error message
    - Coherence-config.xml
    - Coherence-cache-config.xml
    - log4j.xml(optional)

3. Create a lib directory and add the database driver (i.e., /opt/oracle/lib). The type of database you are using will determine the driver you need to download.
    - Oracle database – **ojdbc14.jar**. This file is included in the .zip file you downloaded from E-Delivery. It is in the ext jar .zip file.
    - SQL Server database – download the **jtds.jar** file
        a. Download **jtds** from the following site: http://sourceforge.net/projects/jtds/.
        b. Click **Download** on the top menu bar.
        c. Click the **download** link for jtds (release 1.2.2).
        d. Select the **jtds-1.2.2-dist.zip** file. Save the download .zip file to the lib directory you created (i.e., ../opt/oracle/lib).
        e. Open the downloaded .zip file and extract the file **jtds-1.2.2** from the root of the .zip file.
        f. Rename the file **jtds.jar**.
4. Copy the following .jar files to the Websphere ext folder (i.e., ../opt/IBM/WebSphere/AppServer/lib/ext). These files are located in the .zip file you downloaded from E-Delivery.
    - antlr-2.7.6.jar
    - commons-collections.jar
    - commons-logging-1.1.jar
    - el-api.jar
    - log4j-1.2.9.jar
    - spring-agent.jar

Create a New Application Server

1. Using a WebBrowser, connect to the Administrative Console using the appropriate server_name and port. (Ex: http://server_name:port/admin)
2. Login using your username.

Figure 1-1: WebSphere Administrative Console



3. Click **Servers** from the main menu.

Figure 1-2: Main Menu

4. Click **Application servers** from the main menu.

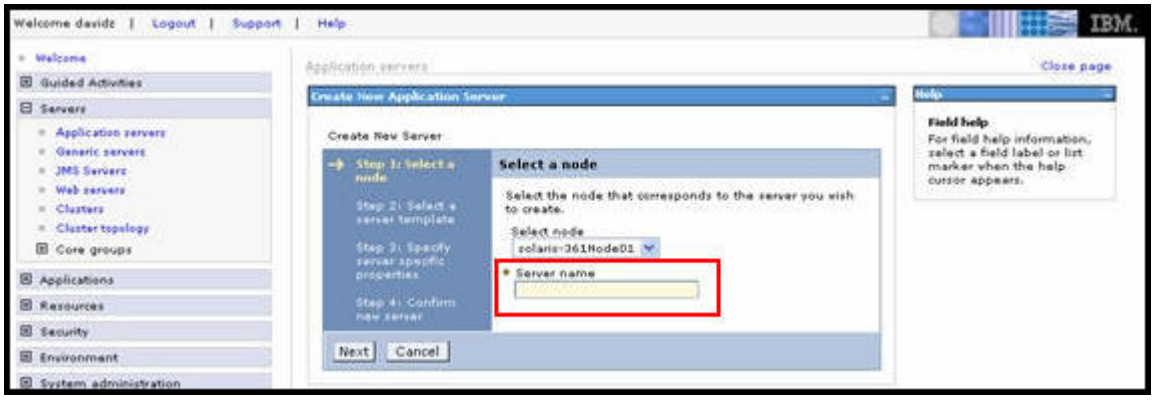
Figure 1-3: Servers

5. Click **New**.

Figure 1-4: Application Servers

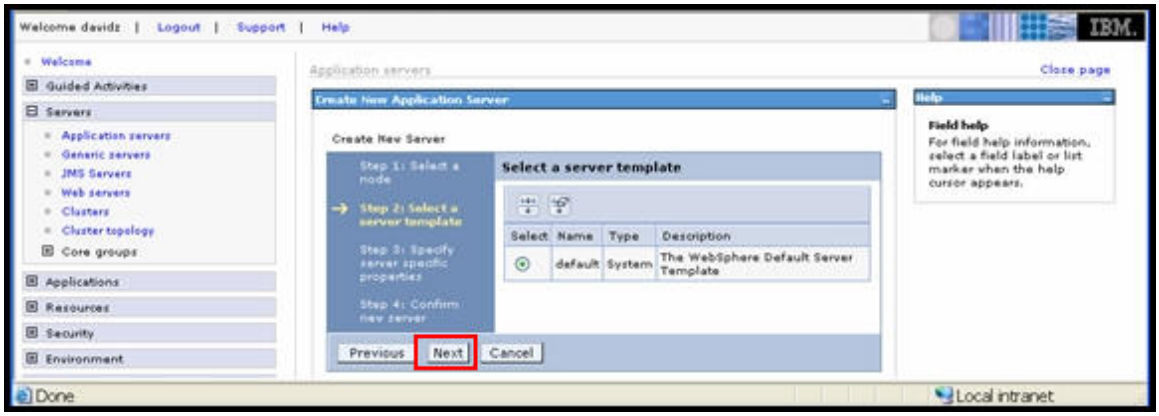
6. Fill in the appropriate server name.
7. Click **Next.**

Figure 1-5: Select a Node



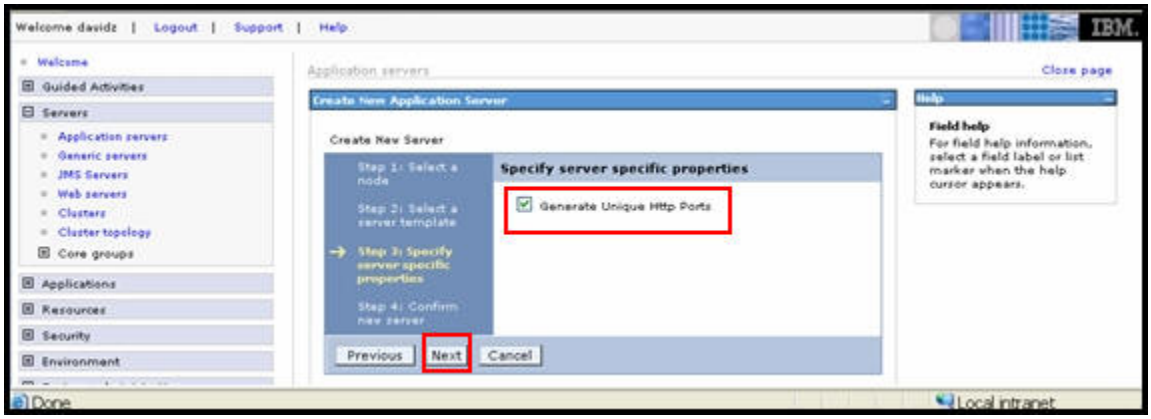
8. Click **Next**.

Figure 1-6: Server Template



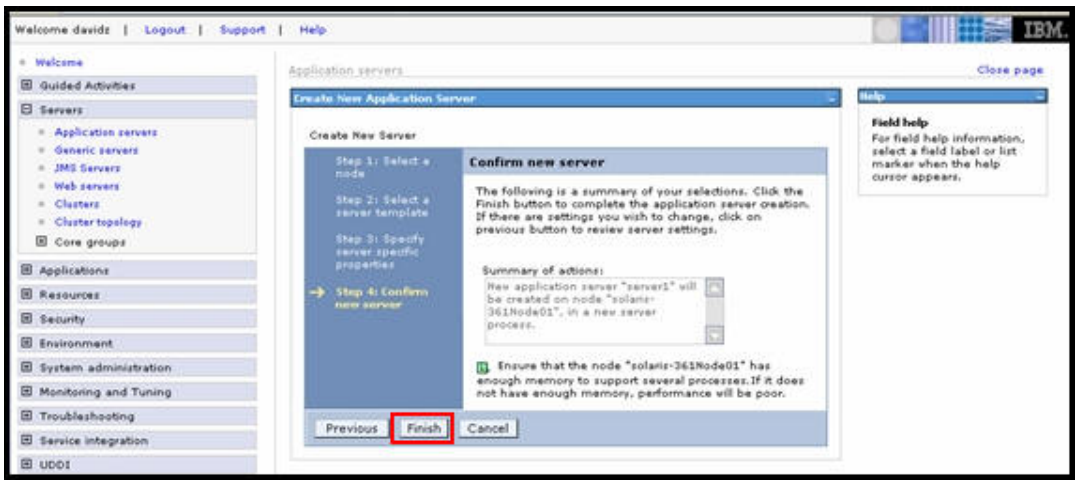
9. Make sure the box titled "Generate Unique Http Ports" is checked.
10. Click **Next**.

Figure 1-7: Specify Server Specific Properties



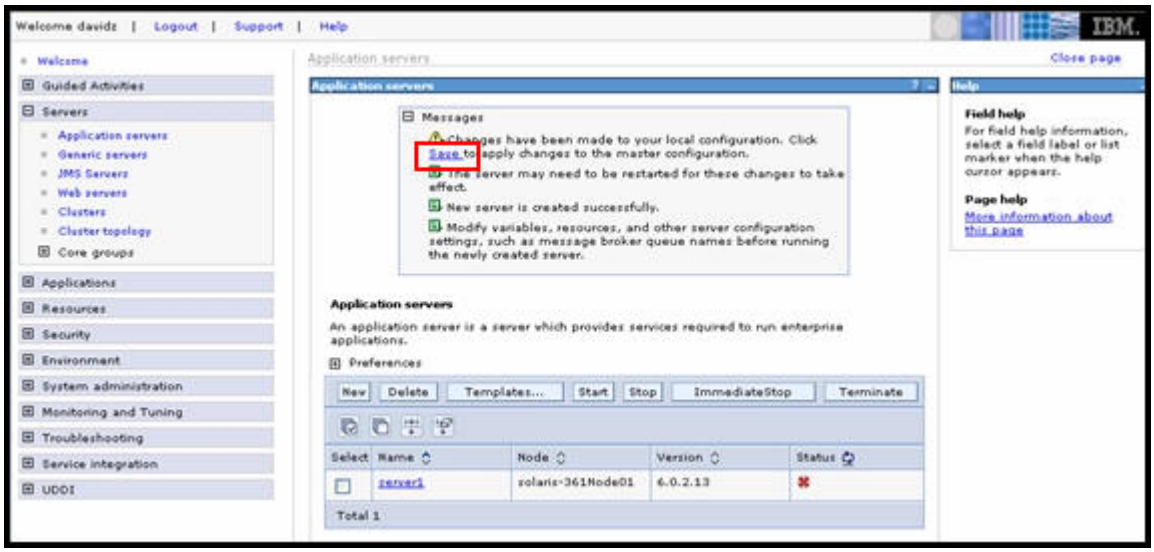
11. Click **Finish**.
12. Click **Save**. Make sure **Synchronize changes with Nodes** check box is checked.

Figure 1-8: Confirm New Server



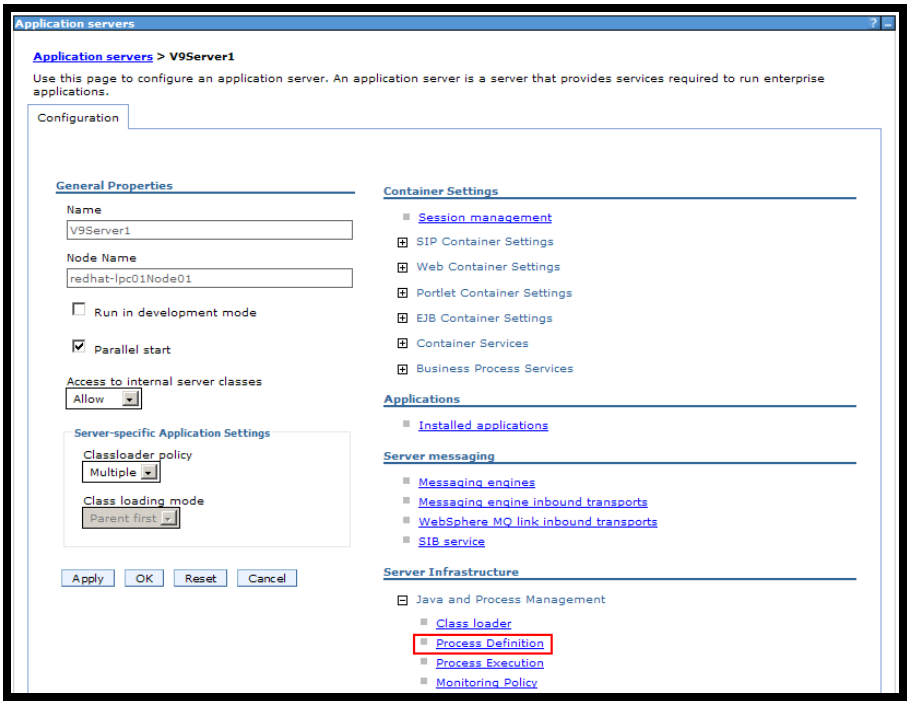
13. Click **Save** and then **OK**.

Figure 1-9: Apply Changes to Application Server



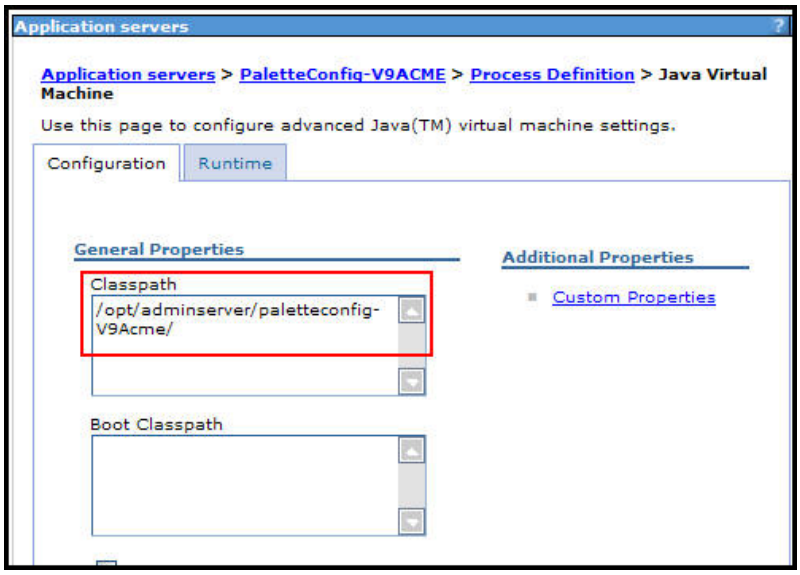
Server Properties

1. Click the **Name** of the server you just created. Expand out **Java and Process Management** from the right column and select **Process Definition**.



2. Under **Additional Properties** select **Java Virtual Machine**.

3. Under **Classpath** enter the location of your properties files. They are in the folder you created for Configuration files during server set-up.



4. Set **Initial** and **Maximum Heap Sizes** to 512 and 1024 respectively. These are the default recommended values. Depending on the hardware and number of servers existing or planned, these values may differ.

5. Copy the following default values for **Generic JVM arguments**:

   -Duser.language=en -Duser.region=US -Djava.net.preferIPv4Stack=true -Djava.net.preferPv6Addresses=false -javaagent:**FilePath**/spring-agent.jar -Dtangosol.coherence.override=/**FilePath**/coherence-config.xml

   Note: Use backslash (\ ) if using Windows. Use the forwardslash (/) if using Linux.

   Note: As with the heap sizes, these values may differ depending on the system configuration.

6. When finished click **OK** and **Save**. Make sure to synchronize changes.

Environment

Driver variables

1. Select **Environment** from the main menu.
2. Click **WebSphere Variables**.

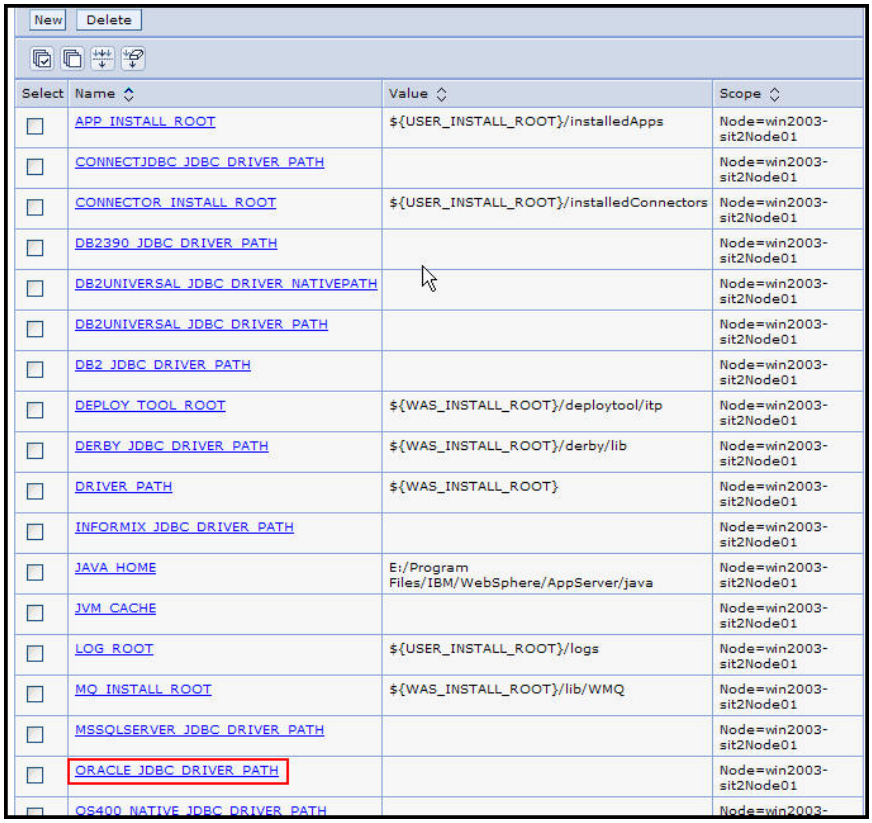
Figure 2-1: Environment

Environment

Depending on your environment, you will need to select the proper values for the database you will be accessing.

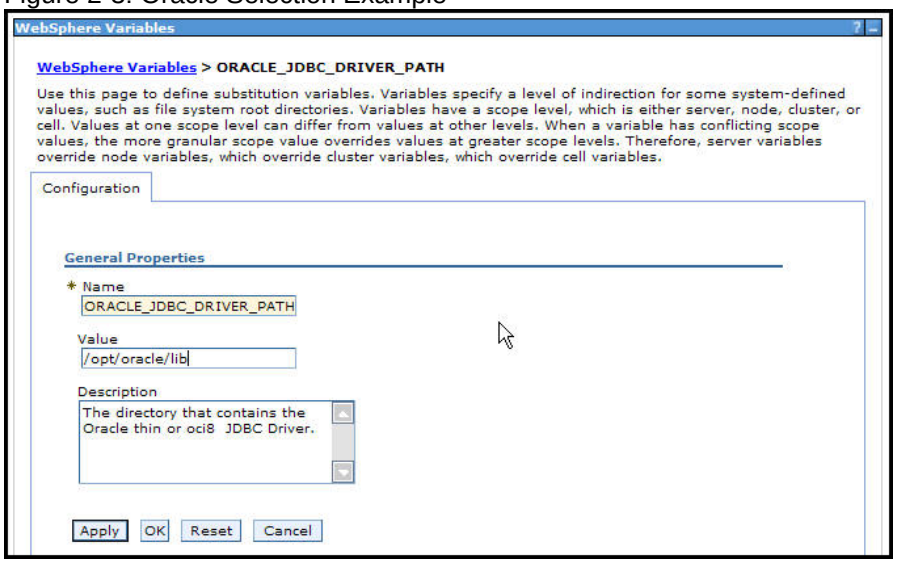
3. Click **ORACLE JDBC DRIVER PATH**.

Figure 2 2: JDBC Driver Path



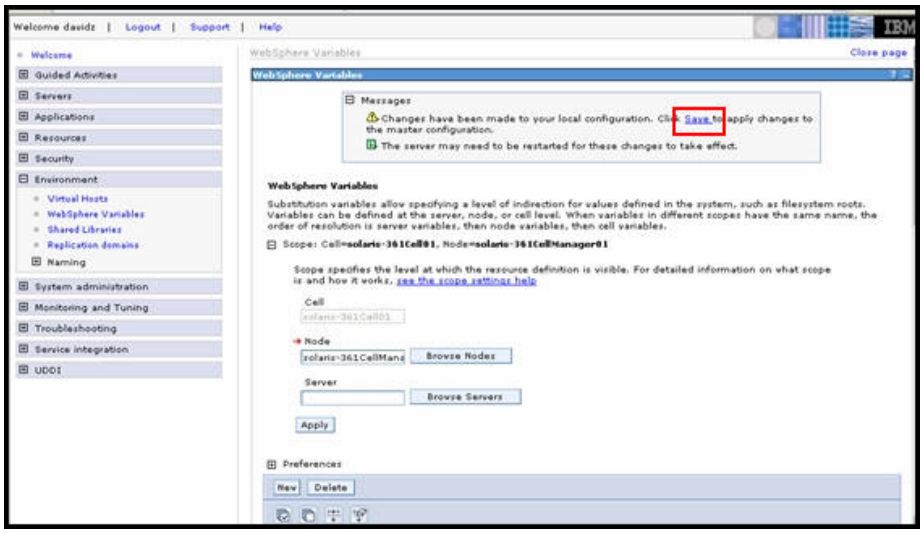
4. Make sure the value field is filled out with the location of the .jar files. Then select **OK**. The following example illustrates the selection of **ORACLE_JDBC_DRIVER_PATH.**

Figure 2-3: Oracle Selection Example



5. Select **Save**.

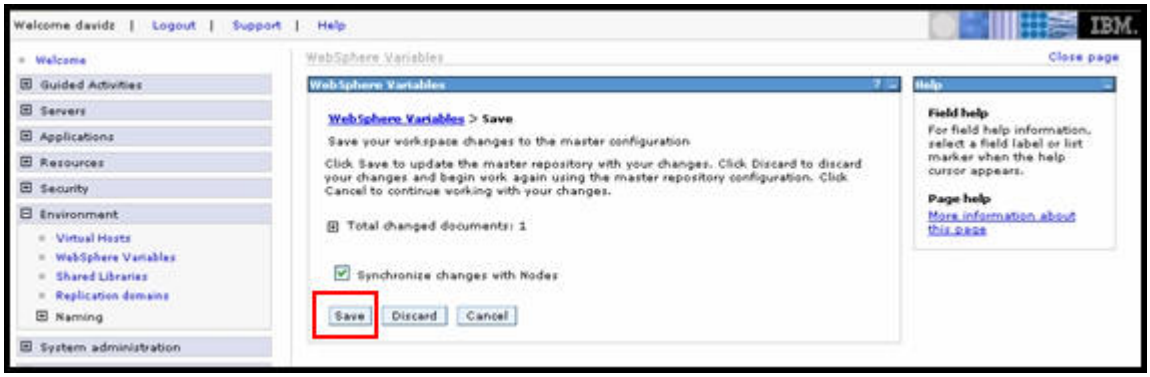
Figure 2-4: WebSphere Variables Changes



6. Select **Save**.

7. Click **OK.**

Figure 2-5: Synchronize Changes



Virtual Hosts

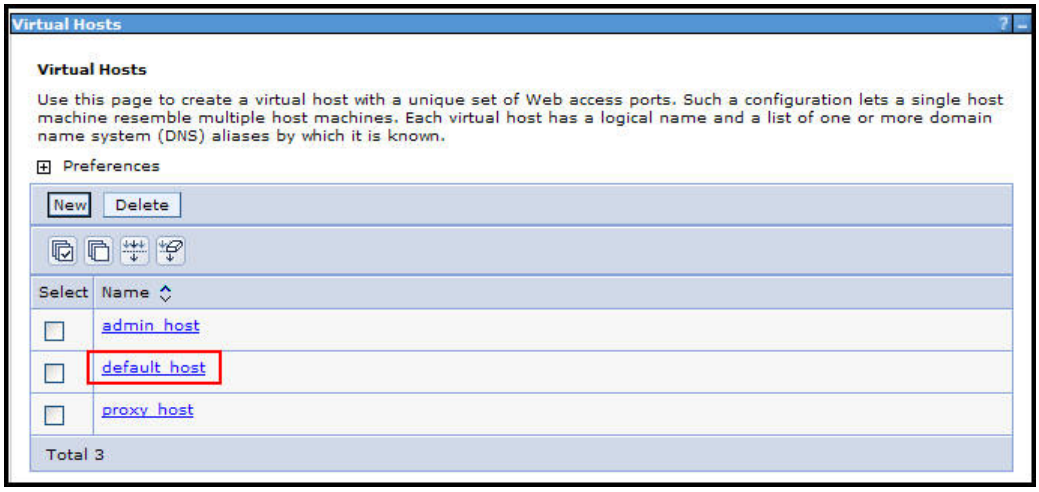
If you are adding another server the new default host port must be added.

1. Select **Environment** and **Virtual Hosts** from the main menu.

Figure 2 6: Virtual Host

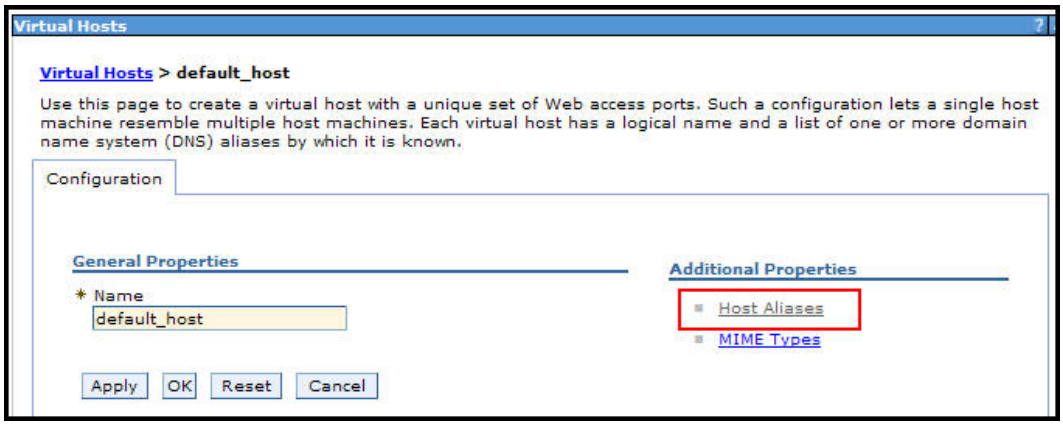
2. Click **Default Host.**

Figure 2 7: Default Host

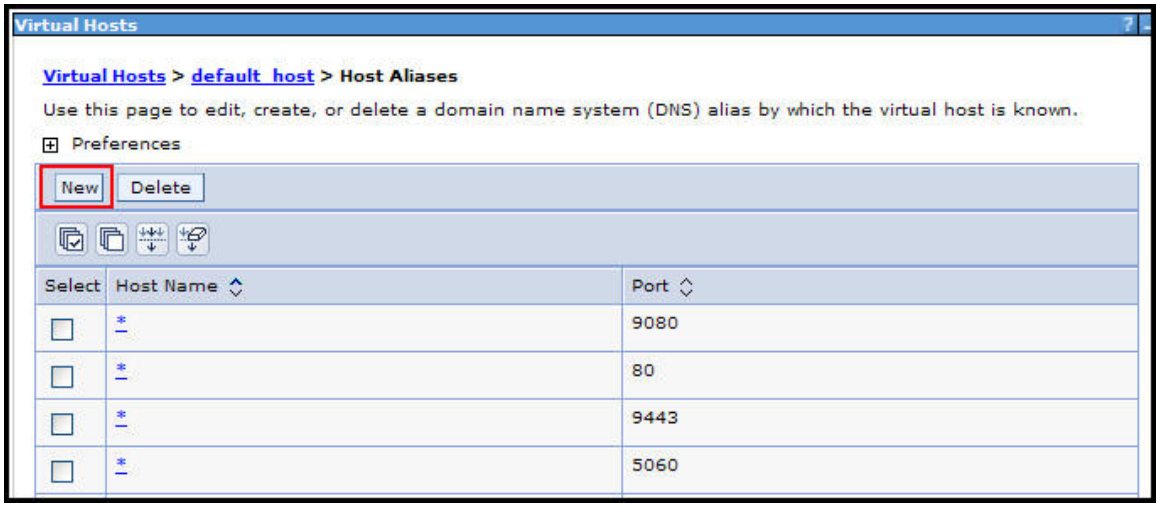


3. Click **Host Aliases**.

Figure 2 8 Host Aliases



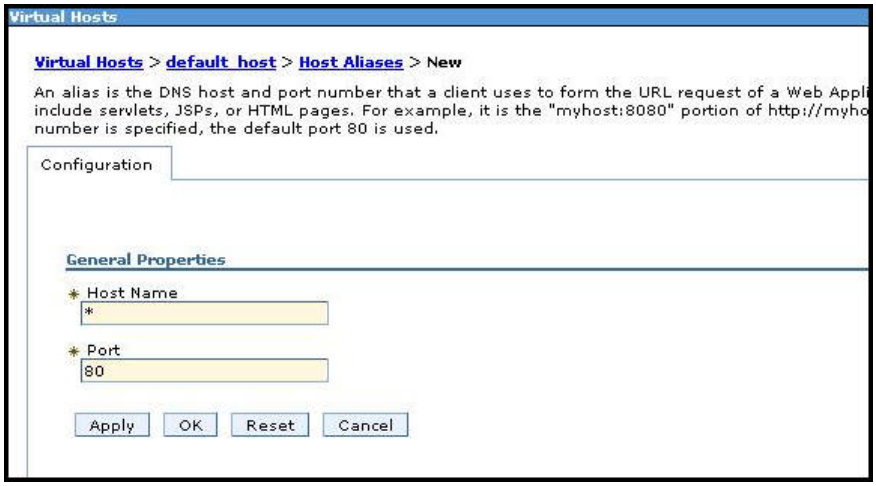
4. Click **New**.



5. Change the Port to the desired number.
    - Standard is 908x where x is incremented up starting at 1 for each additional server added.
6. Click **OK**.
7. Click **Save**. Make sure to synchronize your changes.

8. Click **OK**.

Figure 2 9: General Properties



Resources

1. Select **Resources** and then **JDBC** and **JDBC Providers** from the main menu.

Figure 3-1: JDBC Provider Selection

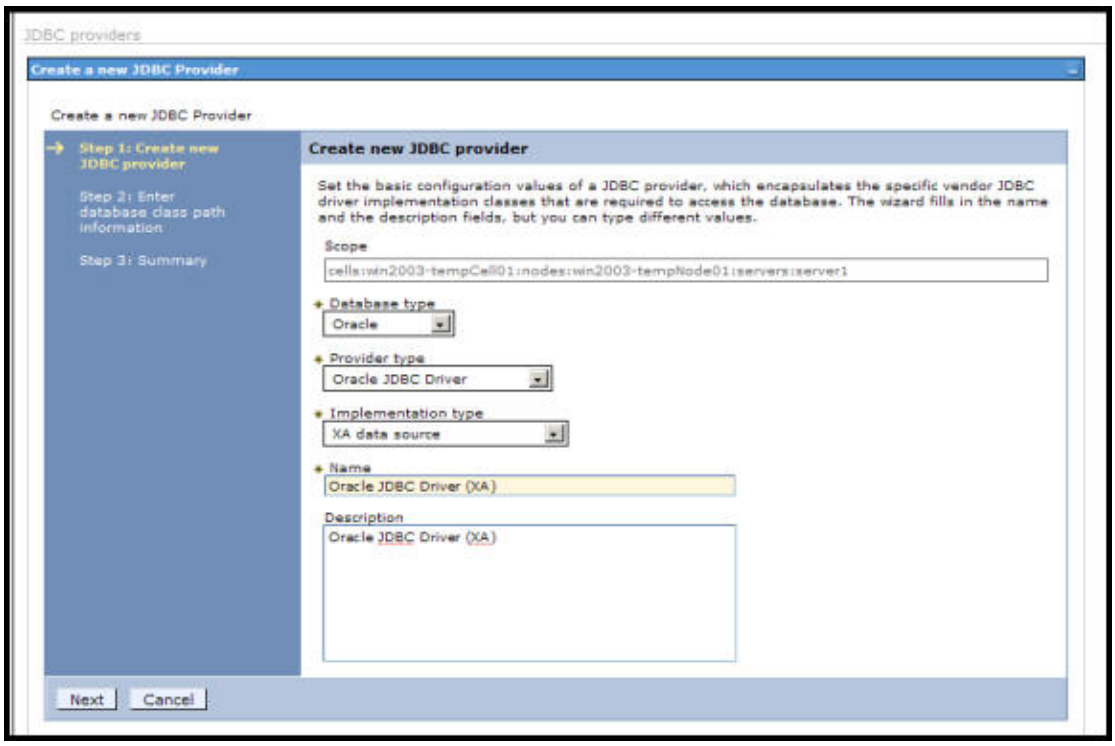
2. Select the server name you are installing on from the drop down list on the top portion of the screen.

3. Select **New**.

Figure 3 2: Select Server

4. Select Database type and the Implementation class name. Enter the name of the driver if it is not pre-populated.
5. Select **Next**.

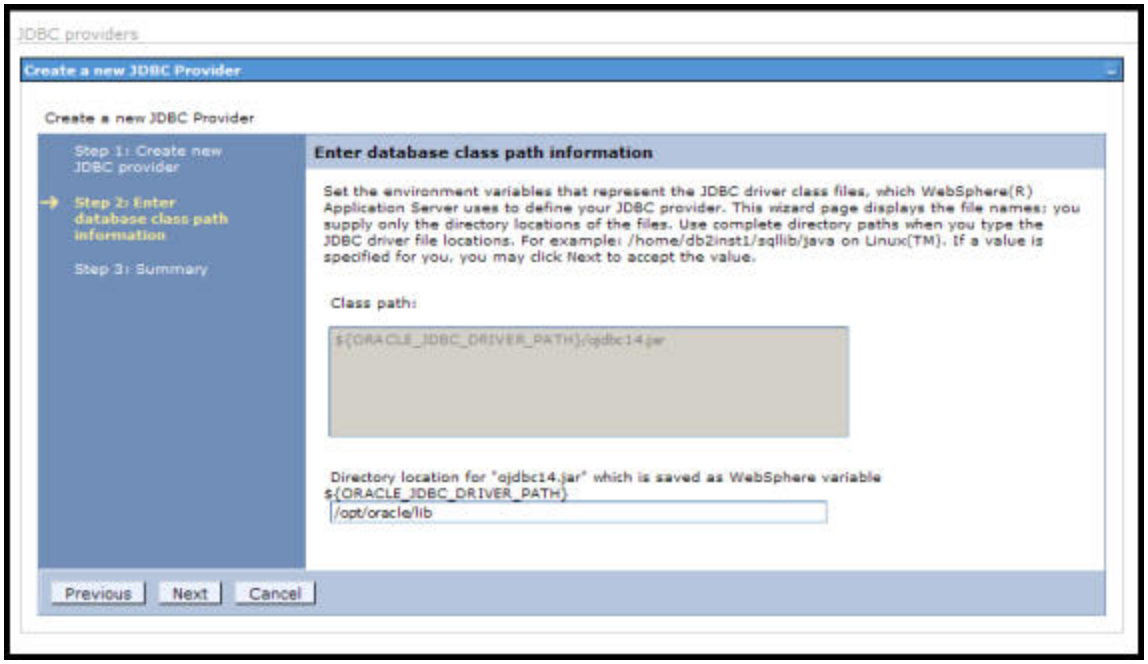
Figure 3 3: Properties



6. Enter the path for the database .jar file if different from the default path listed.

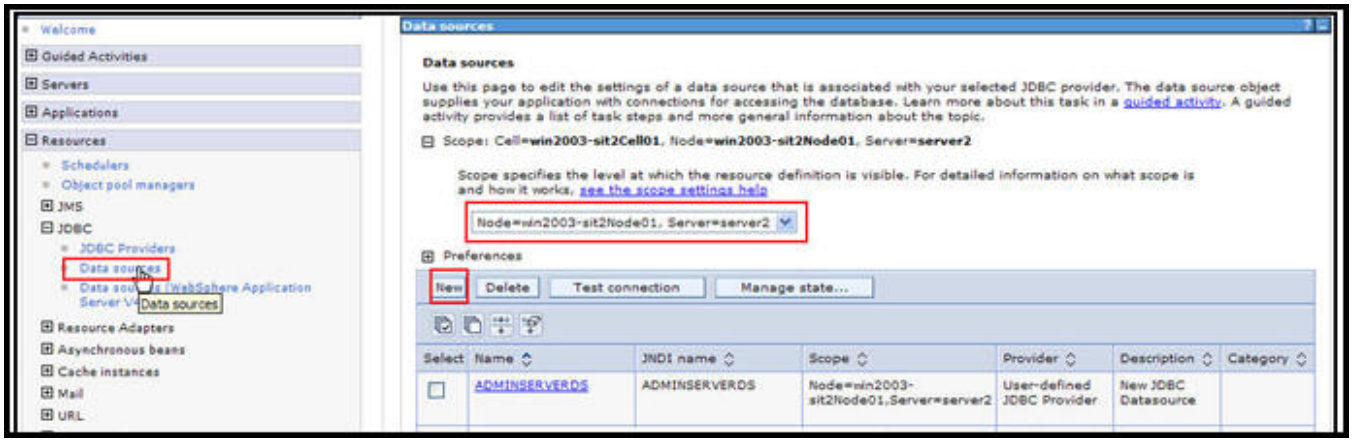
7. Select **Next**.

Figure 3 4: Select Node Scope



8. Click **Finish.**
9. Click **Save**.

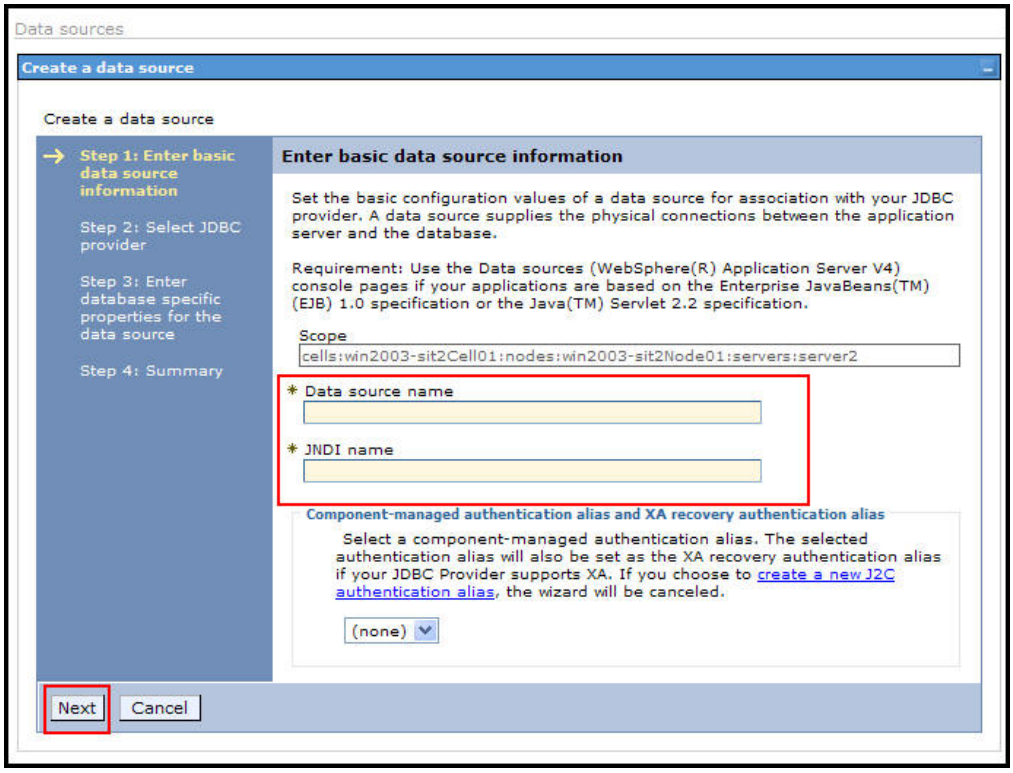
Figure 3 5: Data Sources



10. Select **Data Sources** from the Resources menu option.
11. Select the server if it is not listed in the drop down box.
12. Select **New**.
13. Enter the data source name, which is ADMINSERVERDS.
14. Enter the JNDI name, which is ADMINSERVERDS.

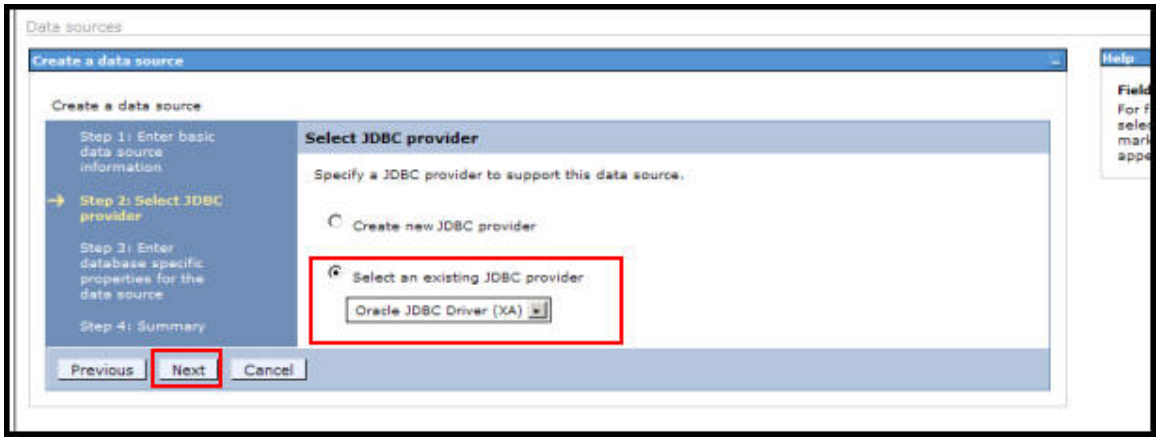
15. Select **Next**.

Figure 3-6: New JDBC Provider



16. Select the radio button for **Select an existing JDBC provider** and then select the existing JDBC provider from the drop down list.
17. Select **Next**.

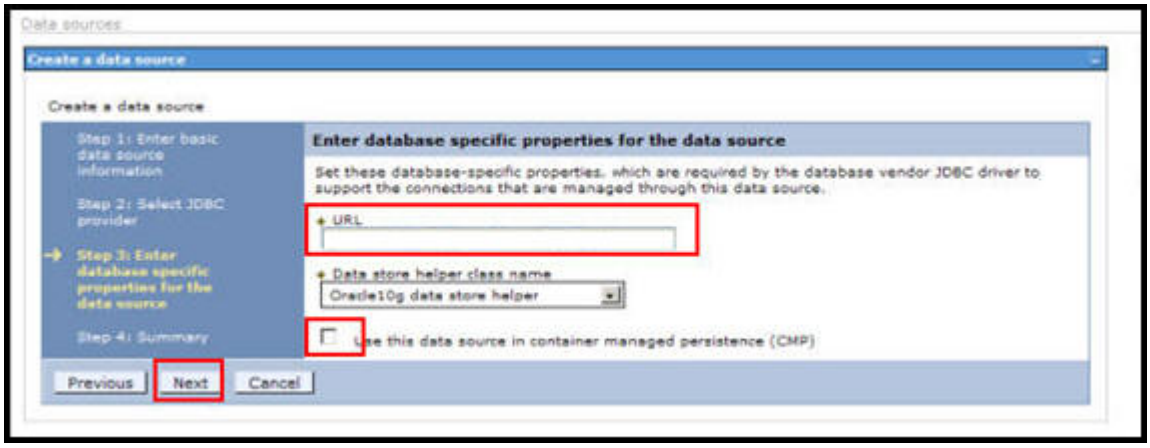
Figure 3-7: JDBC General Properties



18. Enter the URL for the database (Ex: **jdbc:oracle:thin:@ServerName:Port:SID)**. Skip this step if using SQL Server 2005.
19. Uncheck the CMP check box.

20. Select **Next**.

Figure 3 8: Database Properties

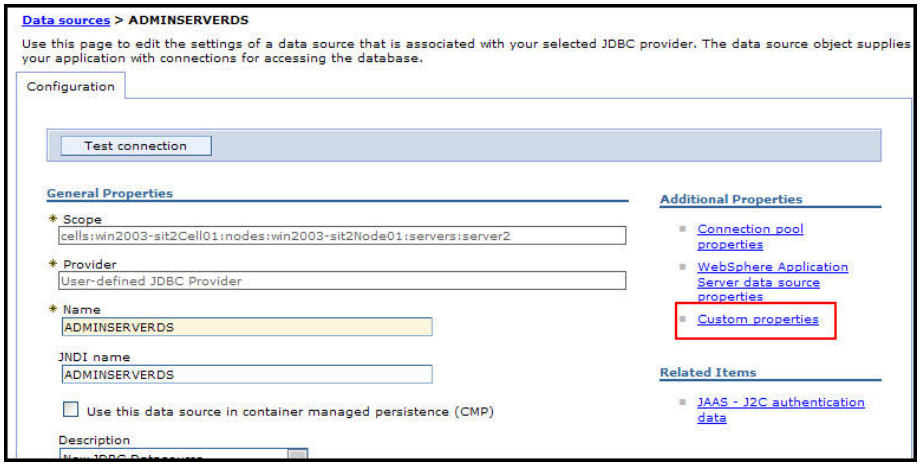


21. Select **Finish**.
22. Select **ADMINSERVERDS** from the Data sources window.

Figure 3 9: Modify Data source

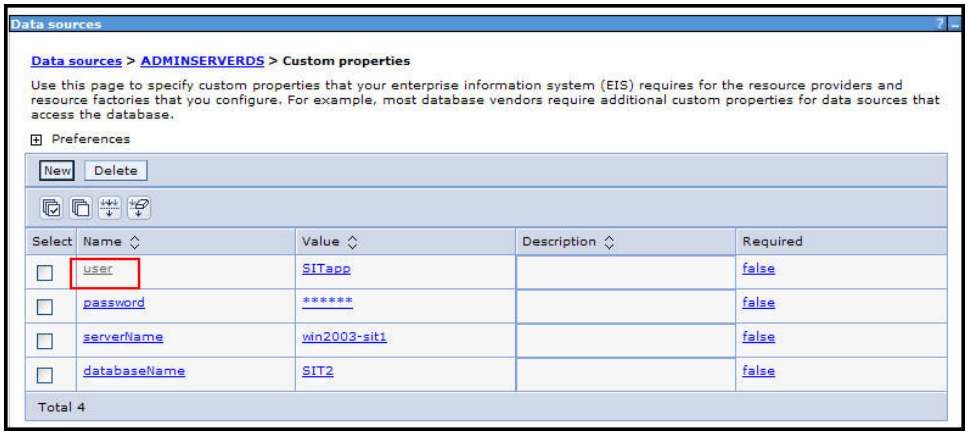
23. Select **Custom Properties**.

Figure 3 10: Custom Properties



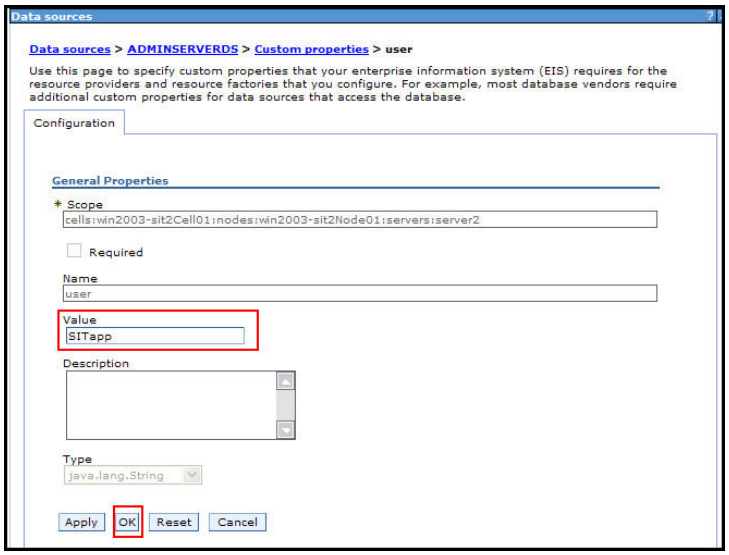
24. Select **User** if setting up Oracle. If you are setting up SQL Server 2005, skip to step 27.
25. Input Database Login User name in the Value field.
26. Select **OK** and skip to step 33.

Figure 3 11: Set User Login



27. Click **New** if setting up SQL Server 2005.
28. Enter a name for your custom property.
29. Enter the value, which will vary depending on the type of property you are creating. For user, enter user name. For server, enter server name and so forth.
30. Click **OK**.
31. Continue creating custom properties until you have one for databasename, password, user and servername.
32. Select **OK** and skip to step 36.

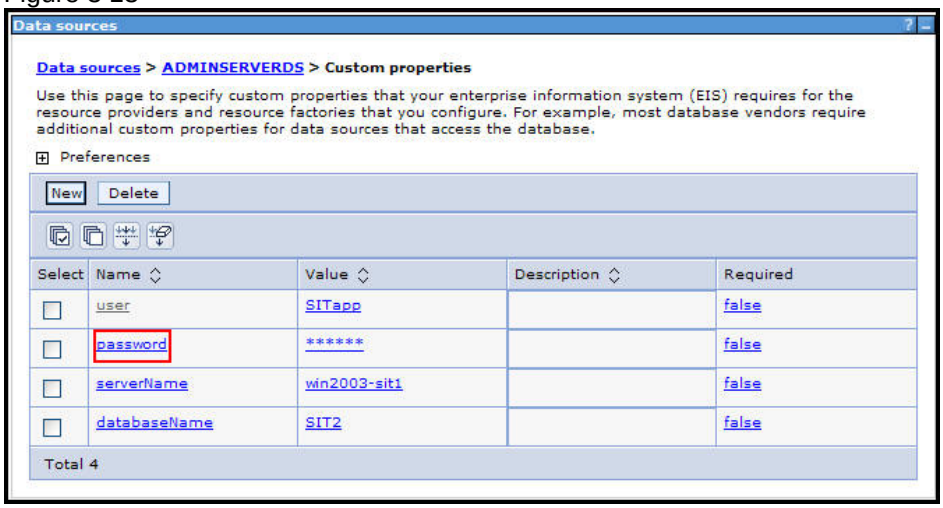
Figure 3 12: Configuration



33. Select **password** from the Custom Properties page.
34. Enter the password in the Value field.

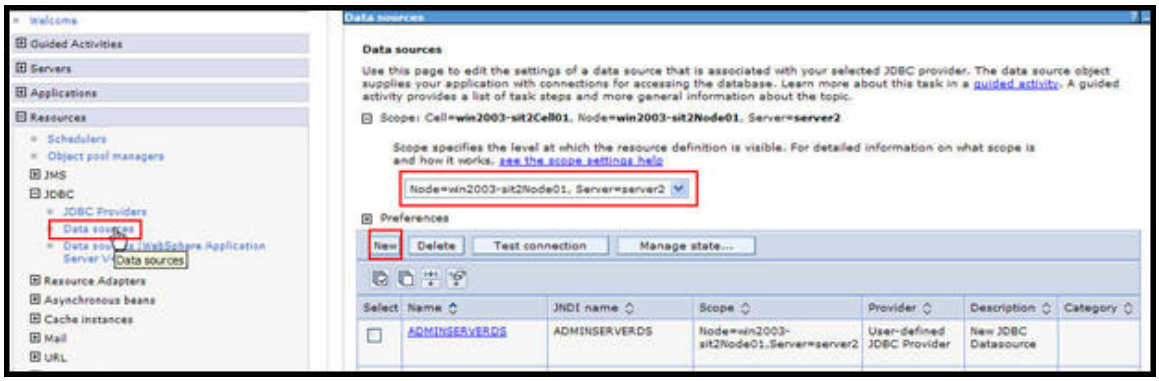
35. Select **OK**.

Figure 3 13



36. Select **Save**.
37. Select **Data Sources** from the Resources menu option.
38. Select the server if it is not listed in the drop down box.
39. Select **New**.

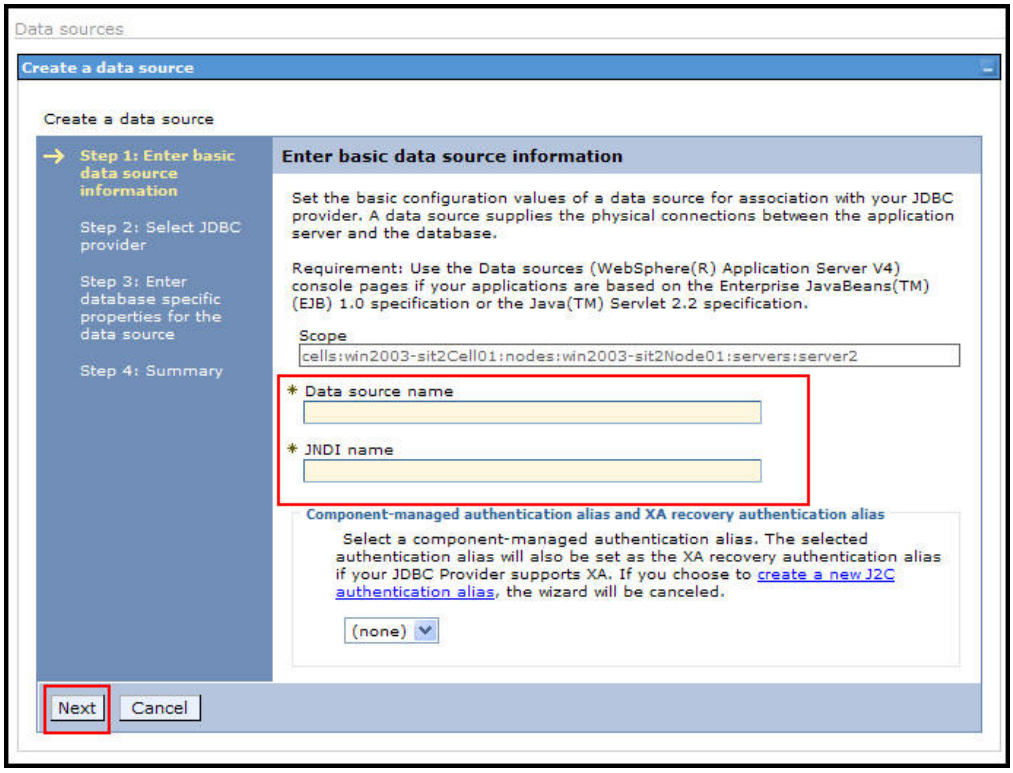
Figure 3 14: Data Sources



40. Enter the data source name and the JNDI name, which is **ADMINSERVERRESOURCESDS**.

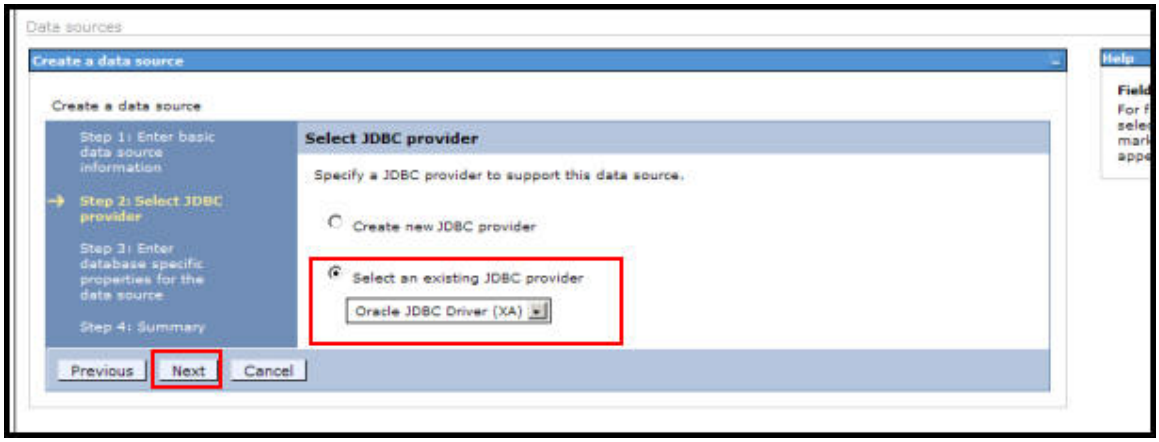
41. Select **Next**.

Figure 3-15: New JDBC Provider



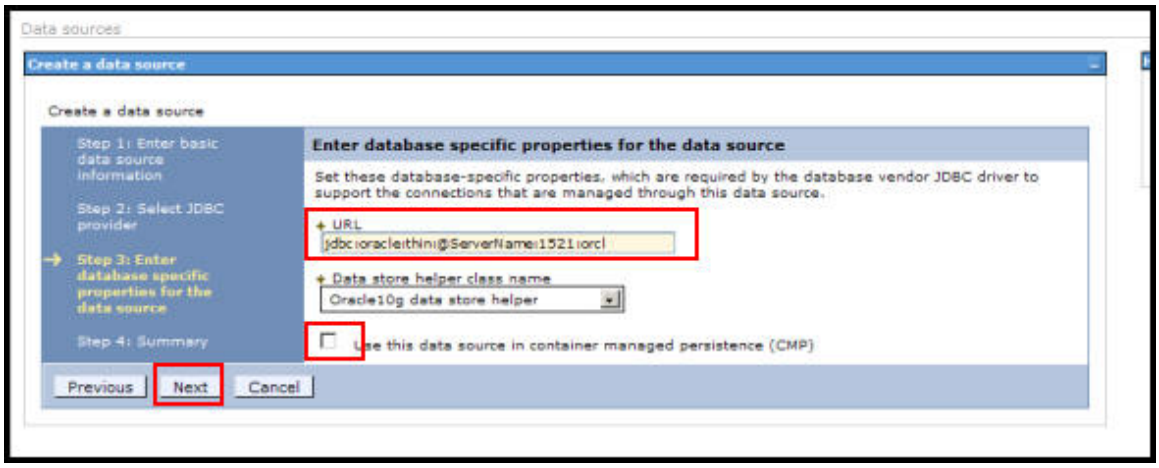
42. Select the radio button for **Select an existing JDBC provider** and then select the existing JDBC provider from the drop down list.
43. Select **Next**.

Figure 3-16: JDBC General Properties



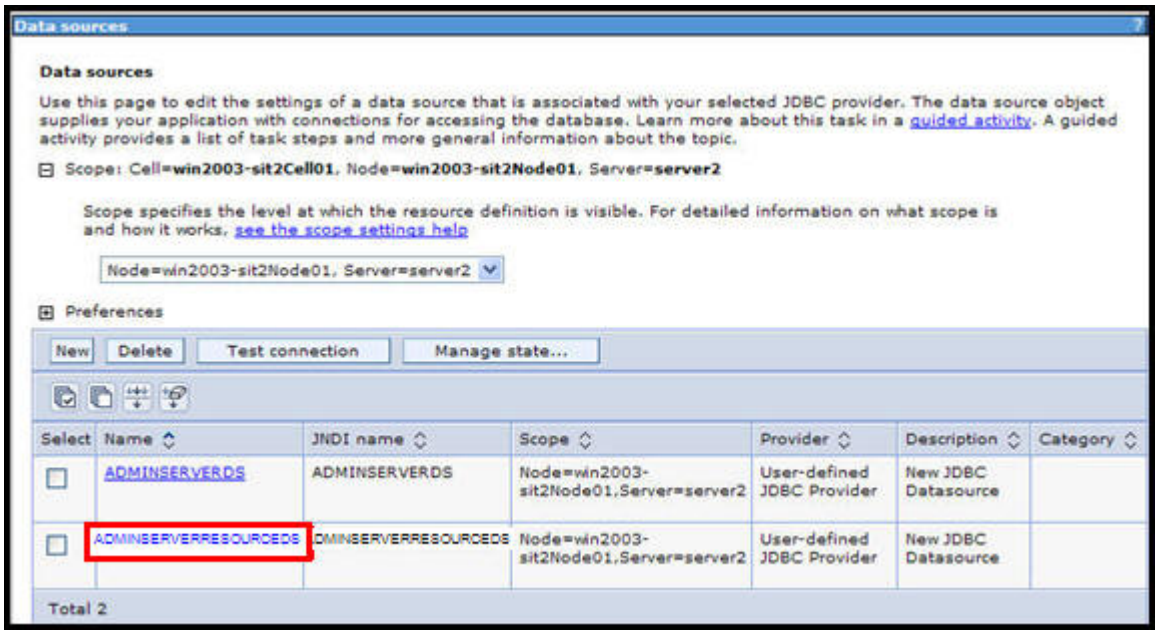
44. Enter the URL for the database (Ex: **jdbc:oracle:thin:@ServerName:Port:SID)**. This step is not necessary if you are using SQL Server 2005.
45. Uncheck the CMP check box.
46. Select **Next**.

Figure 3 17: Database Properties



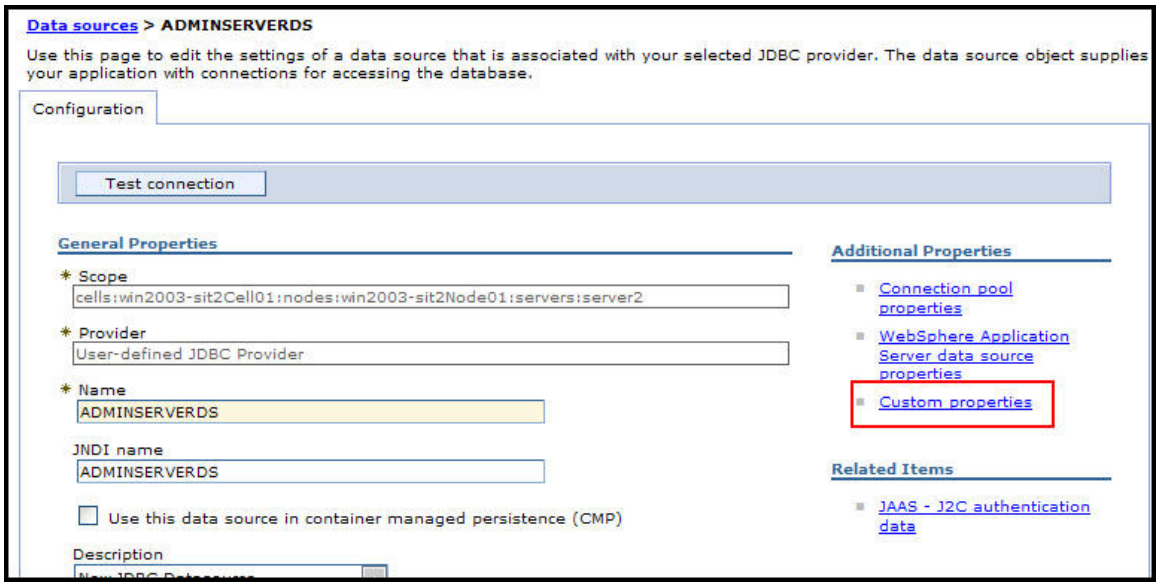
47. Select **Finish**.
48. Select **ADMINSERVERRESOURCEDS** from the Data sources window.

Figure 3 18: Modify Data Source



49. Select **Custom Properties**.

Figure 3 19: Custom Properties



50. Select **User** if setting up Oracle. If you are setting up SQL Server 2005, skip to step 53.
51. Input Database Login User name in the Value field.
52. Select **OK** and skip to step 59.
53. Click **New** if setting up SQL Server 2005.
54. Enter a name for your custom property.
55. Enter the value, which will vary depending on the type of property you are creating. For user, enter user name. For server, enter server name and so forth.
56. Click **OK**.
57. Continue creating custom properties until you have one for databasename, password, user and servername.
58. Select **OK** and skip to step 62.

Figure 3 20: Set User Login

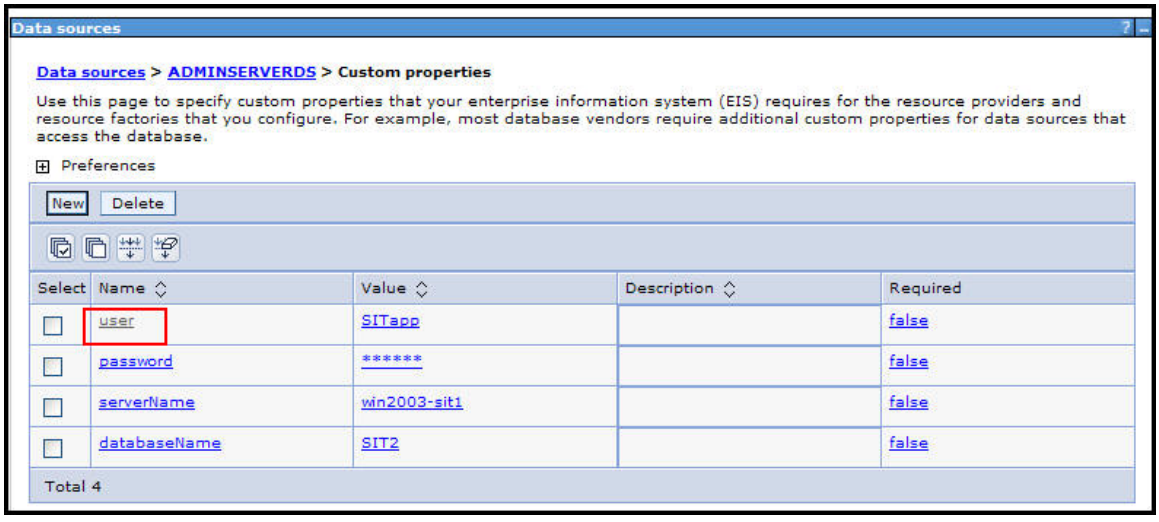
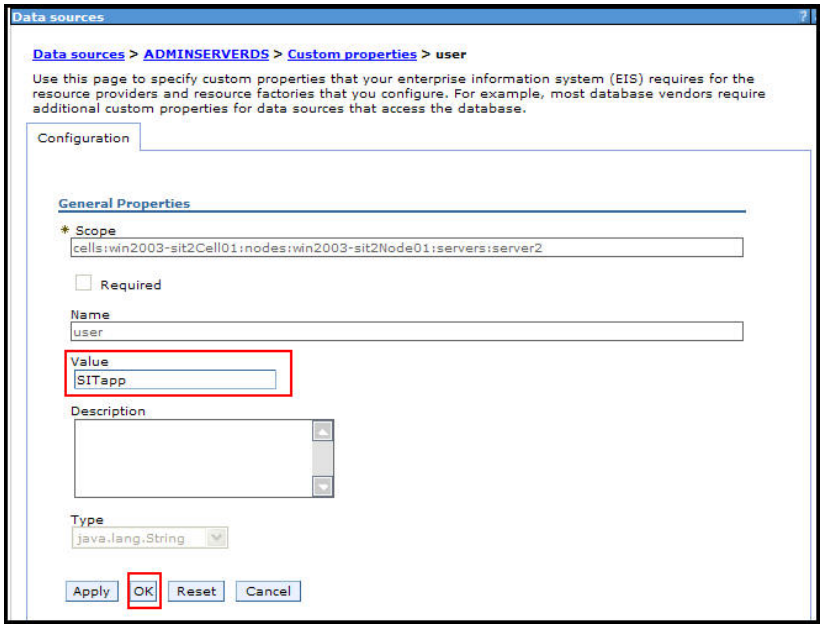
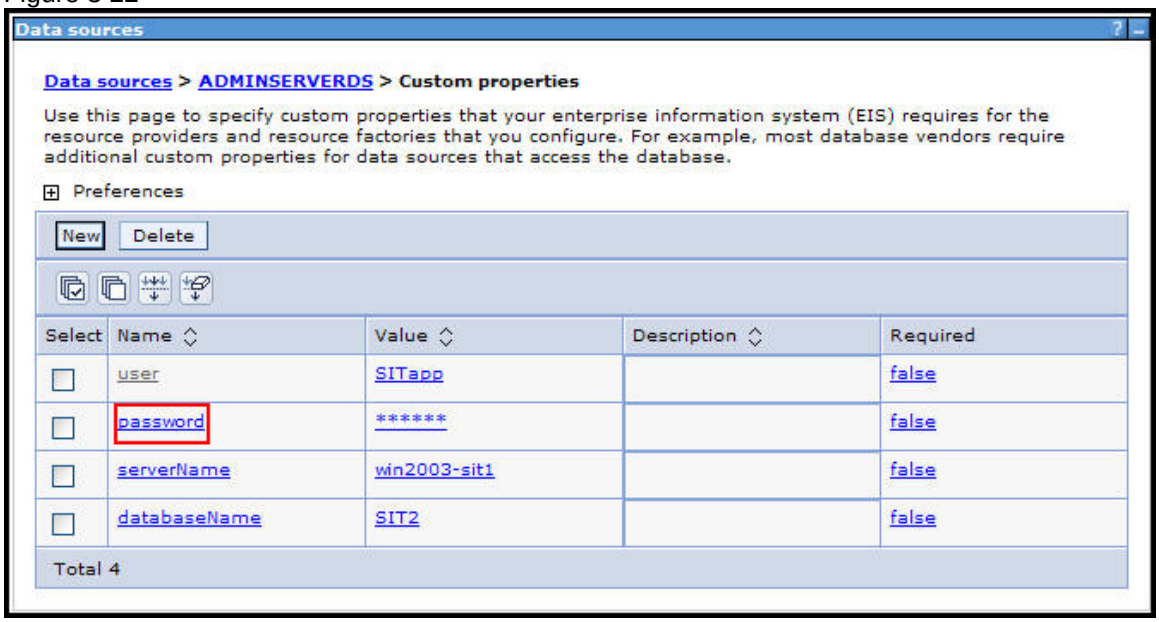


Figure 3 21: Configuration



59. Select **password** from the Custom Properties page.
60. Enter the database password in the Value field.
61. Select **OK**.

Figure 3 22

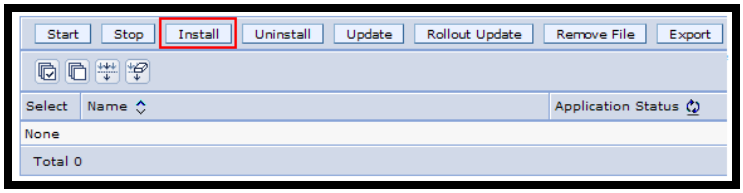


62. Select **Save**.

Install New Application

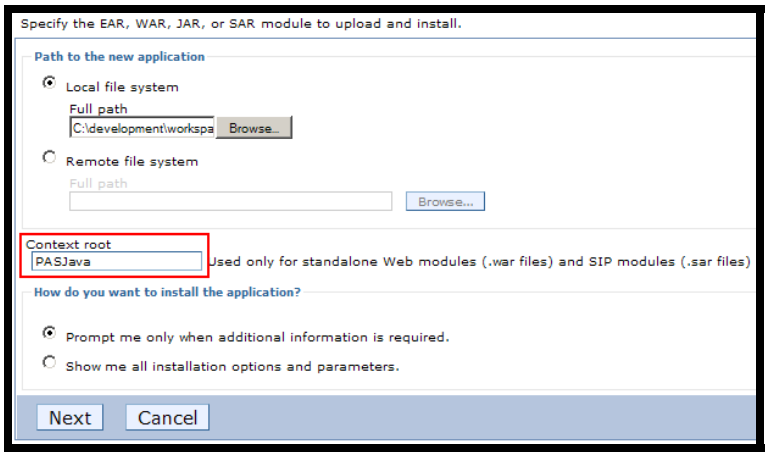
Deploy the Oracle Insurance Policy Administration Version 9 Application

1. Select Applications → Enterprise Application → **Install**
2. If upgrading an existing Application select **Update.**

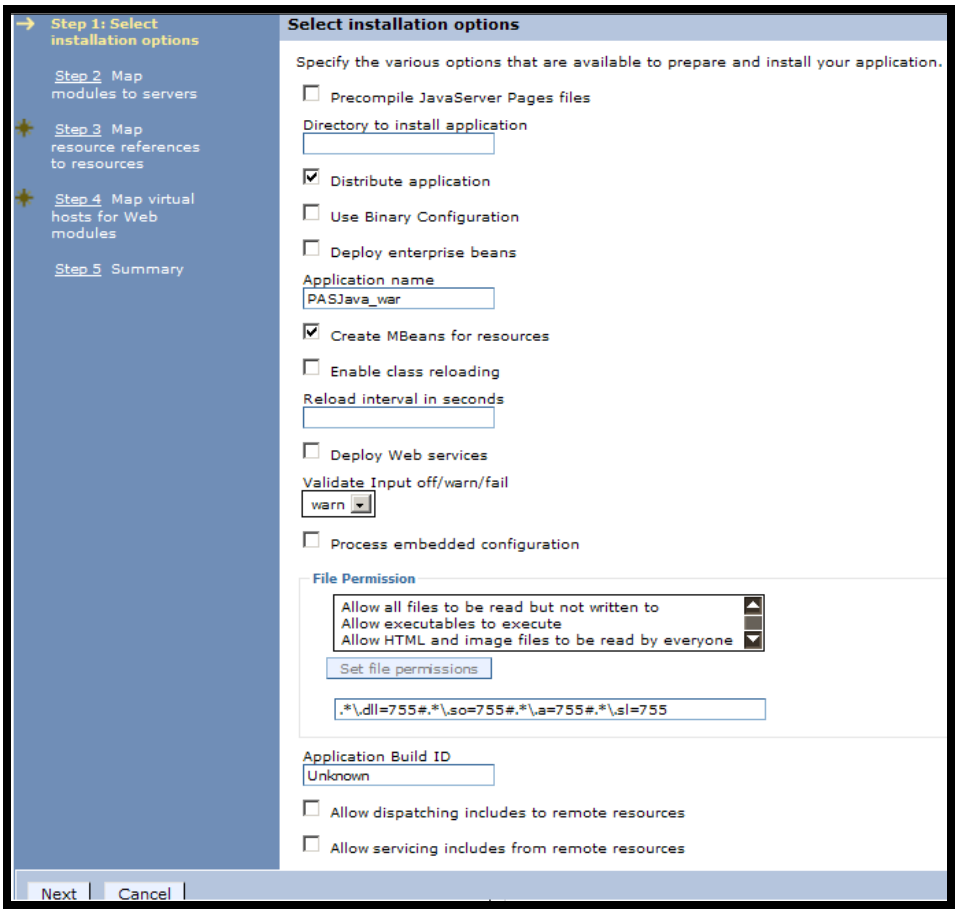


   a. If uploading from your machine, under **Local file system,** click browse and select the **PASJava.war** file. It is in the folder you created for Configuration files during server set-up.
   b. If uploading from the server, select the **Remote file system,** and enter the path to the PASJava.war file.

3. Set the **Context root** to **PASJava** and click **Next**.



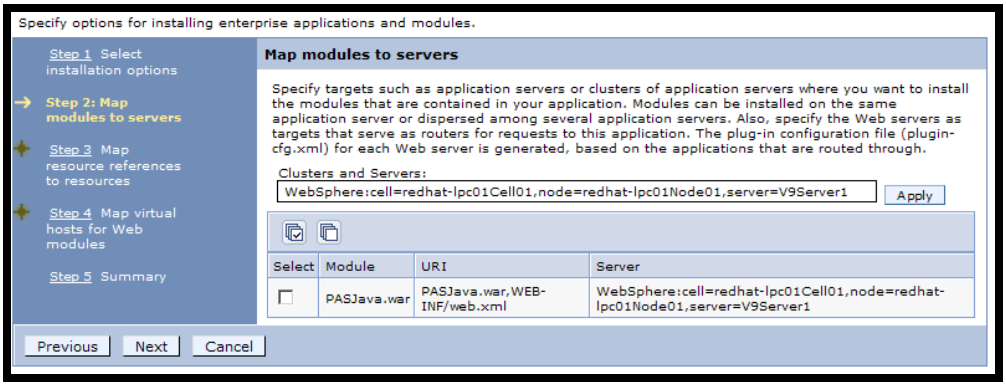
4. If you wish to specify a **Directory to install the application** or change the **Application name** you can do so from here, otherwise click **Next**. If you have multiple servers you will need to change the **Application name** to differentiate them.



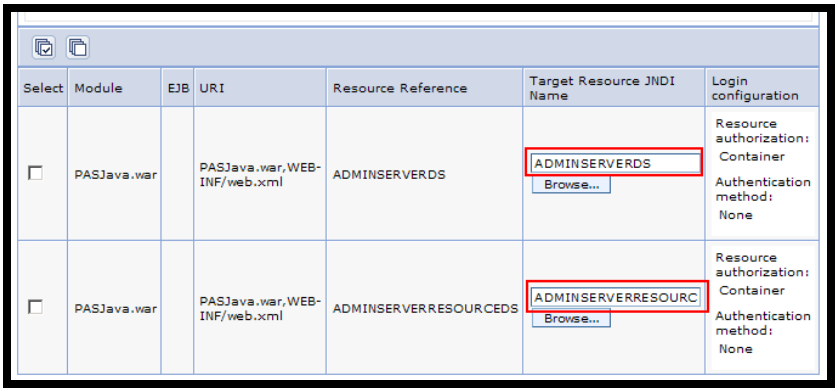
5. Click **Next**. If you have multiple servers you will have to select the server you want under **Clusters and Servers** then select the PASJava.war file.

6. Select the .war file.

7. Click **Apply** then click **Next**.



8. Scroll down to the following location. In the Target Resource JNDI Name column click Browse and select the **AMINSERVERDS** option.
9. Click **Apply**.
10. Scroll down to the following location. In the Target Resource JNDI Name column click **Browse** and select the **AMINSERVERRESOURCEDS** option.
11. Click **Apply**.
12. Click **Next**. These are the default values for the Resources.

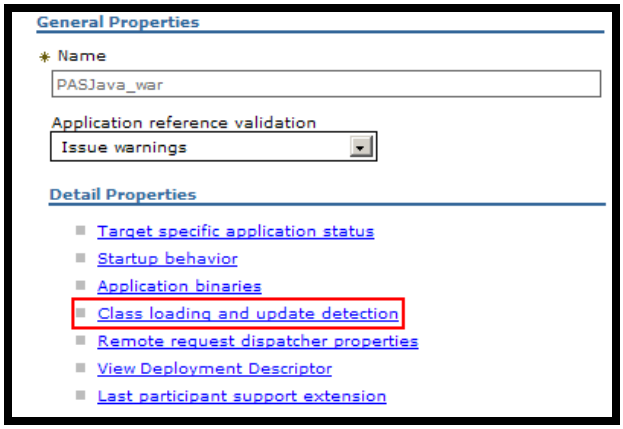


Select	Module	EJB	URI	Resource Reference	Target Resource JNDI Name	Login configuration
☐	PASJava.war		PASJava.war,WEB-INF/web.xml	ADMINSERVERDS	ADMINSERVERDS Browse...	Resource authorization: Container Authentication method: None
☐	PASJava.war		PASJava.war,WEB-INF/web.xml	ADMINSERVERRESOURCEDS	ADMINSERVERRESOURC Browse...	Resource authorization: Container Authentication method: None

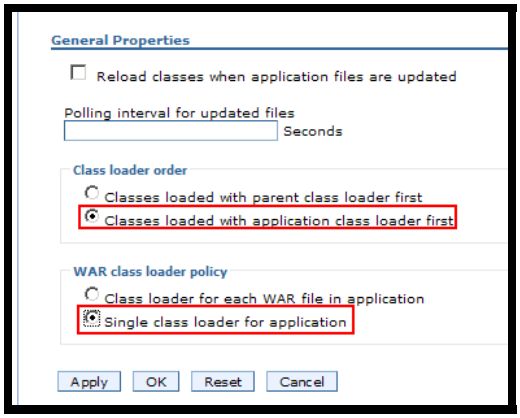
13. Click **Next**.
14. Review your configuration and make any necessary changes.
15. If no changes are needed click **Finish**.
16. Once the installation is complete click **Save**. When Synchronization is complete click **OK**.

Configure the Application

1. Select Application → Enterprise Application → New Application you just created.
2. Click **Class Loading and update detection** under **Detail Properties**.



3. Select **Classes loaded with application class loader first** and **Single class loader for application**.



4. Click **OK** and **Save**.

Start the Application

1. Select Servers → Application Servers.
2. Select the server(s) you wish to start.
3. Click **Start**.

IMPORTANT: If there are installation errors, your application will not start. Check the System.Out log for error messages. You will need to be well versed in WebSphere and JAVA to decipher the error messages. Here are a few sample locations for the System.Out log.

> **Windows**: E:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\logs\server1\
> **Linux**: /opt/IBM/WebSphere/AppServer/profiles/AppSrv01/logs/server1/

Depending on where you have WebSphere installed, the first few folders of the location may vary. In both instances above, the Application Server name is "server1". The AppSrv01 name might also differ depending on the installation of WebSphere.

4. Wait for the page to refresh and the icon under Application Status to turn to a green arrow.
5. In your browser, go to: http://**servername**:**portnumber**/PASJava/Login/Login.iface replacing the **servername** and **portnumber** with the correct information.
6. The default login ID and password is *install*.

You have successfully completed the installation process for the Oracle Insurance Policy Administration application. The next step is to install and set-up the Rules Palette Web Application Utility.

Web Application Utility Installation

Prerequisites

In order to proceed with the following installation steps, you must have the following components:

- A server with Windows Enterprise 2003 R2.sp2.
- WebSphere Network Deployment Manager media. This can be downloaded from the IBM website or from a CD provided by IBM.
- Administrative rights to the server. You will not be able to complete the installation without administrative privileges.
- PaletteConfig.war file. This file can be downloaded from E-Delivery when you select the Oracle Insurance Application product pack and the Windows 32-bit platform. You will see the Oracle Insurance Rules Palette link. Select the **download** button and extract the .zip file. You will see a file called OIRP-V9GA. Inside is the PaletteConfig folder, which contains the PaletteConfig.war file.
- PaletteWebApplication.properties- This file is included in your download from E-Delivery. You will see a file called OIRP-V9GA. Inside is the PaletteConfig folder, which contains the file.

Server Set-up

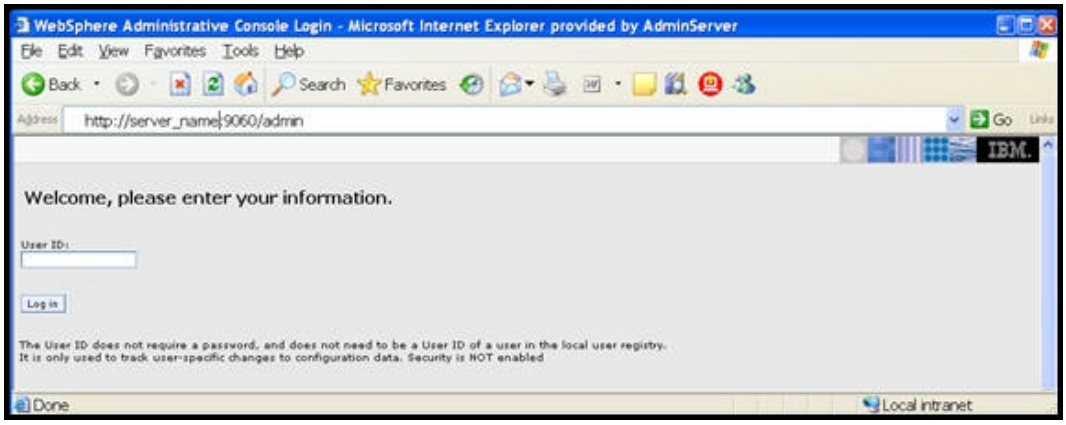
Create a Directory for the Configuration files

1. Create a directory on the WebSphere installation machine to store configuration files for the RP V9 system (i.e., /opt/oracle/server1).
2. Copy into this folder:
    - PaletteWebApplication.properties – You can edit the file to tell the application where to save various application files. You may elect to create a separate directory for these files. After you have created the directory, specify the location in this file.

Create a New Application Server

1. Using a WebBrowser, connect to the Administrative Console using the appropriate server_name and port. (Ex: http://server_name:port/admin)
2. Login using your username.

Figure 1-1: WebSphere Administrative Console



3. Select **Servers** from the main menu.

Figure 1-2: Main Menu

4. Select **Application servers** from the main menu.

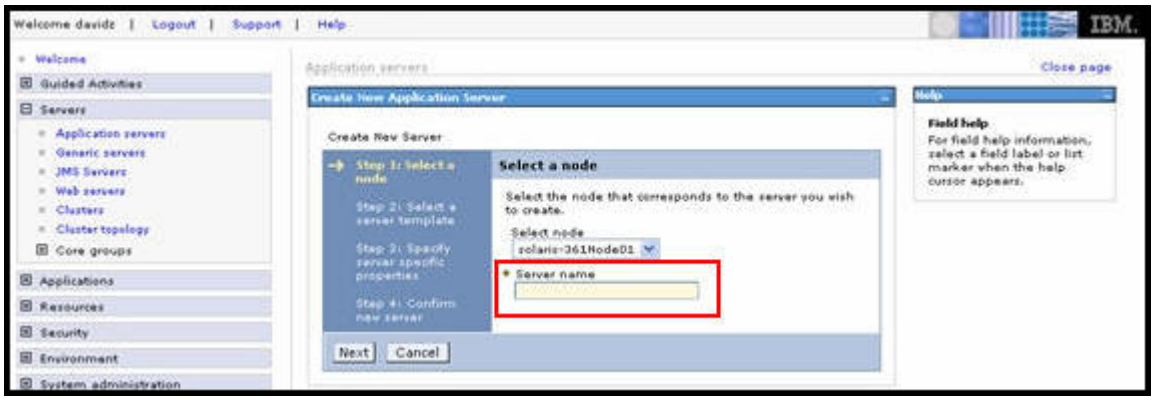
Figure 1-3: Servers

5. Select **New**.

Figure 1-4: Application Servers

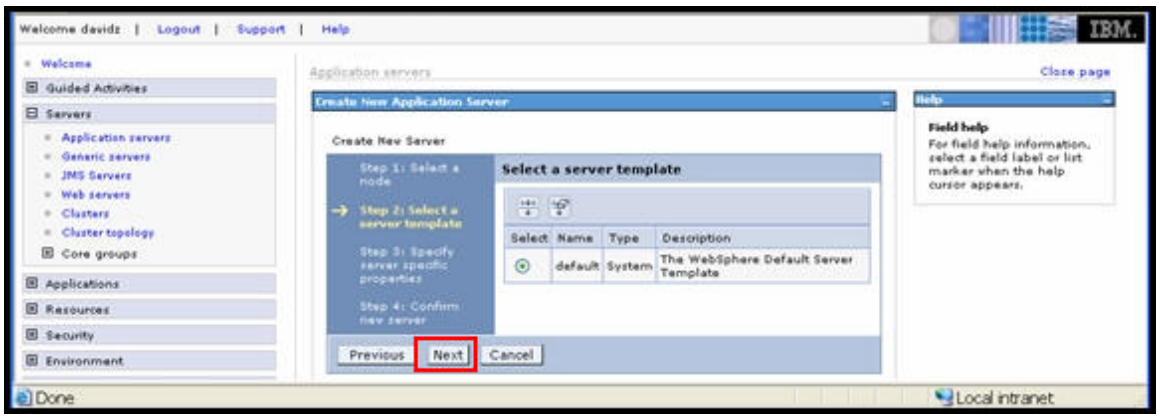
6. Fill in the appropriate server name.
7. Click **Next.**

Figure 1-5: Select a Node



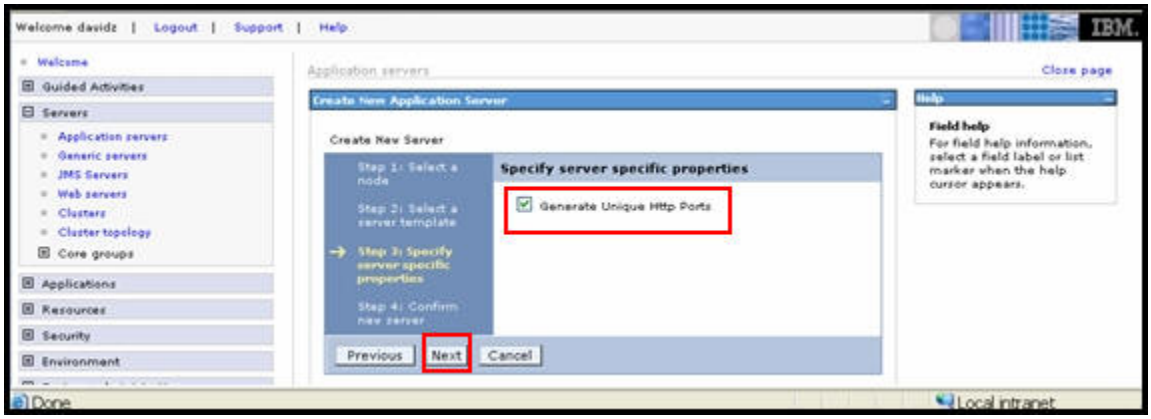
8. Click **Next**.

Figure 1-6: Server Template



9. Make sure the box titled **Generate Unique Http Ports** is checked.
10. Select **Next**.

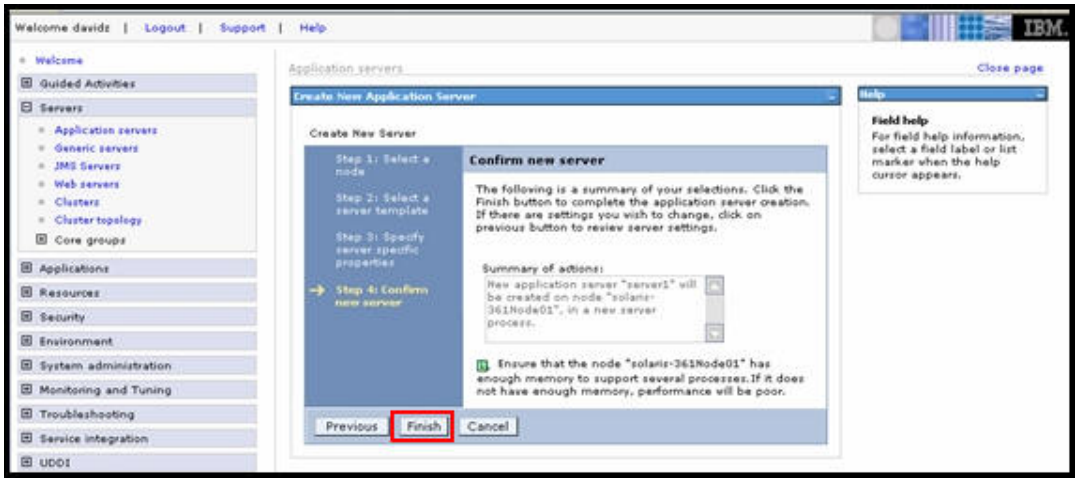
Figure 1-7: Specify Server Specific Properties



11. Select **Finish**.

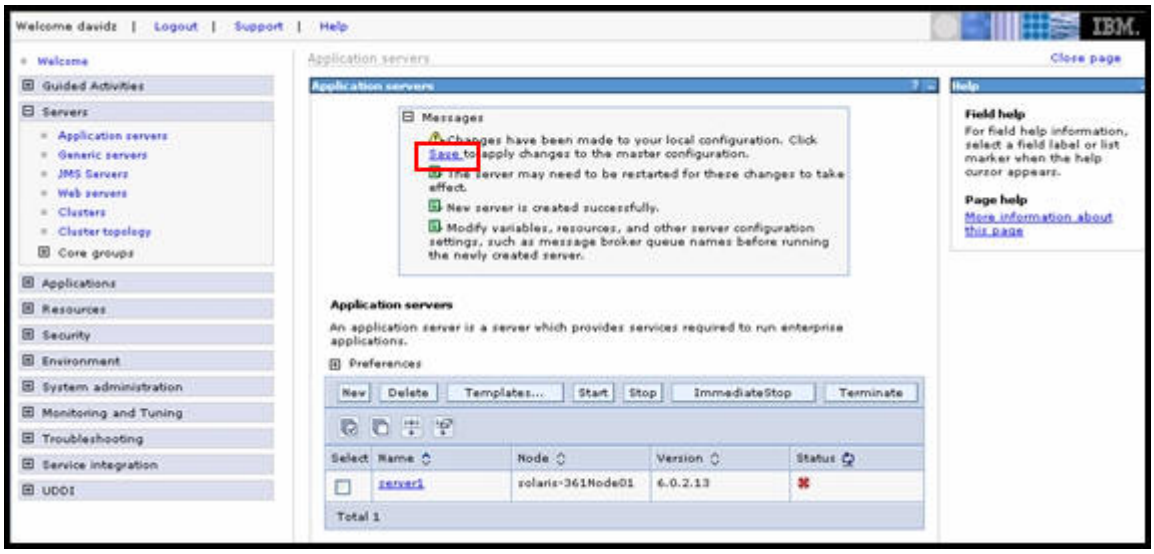
Note: Before saving for the first time select **Preferences** and select the **Synchronize changes with Nodes** check box.

Figure 1-8: Confirm New Server



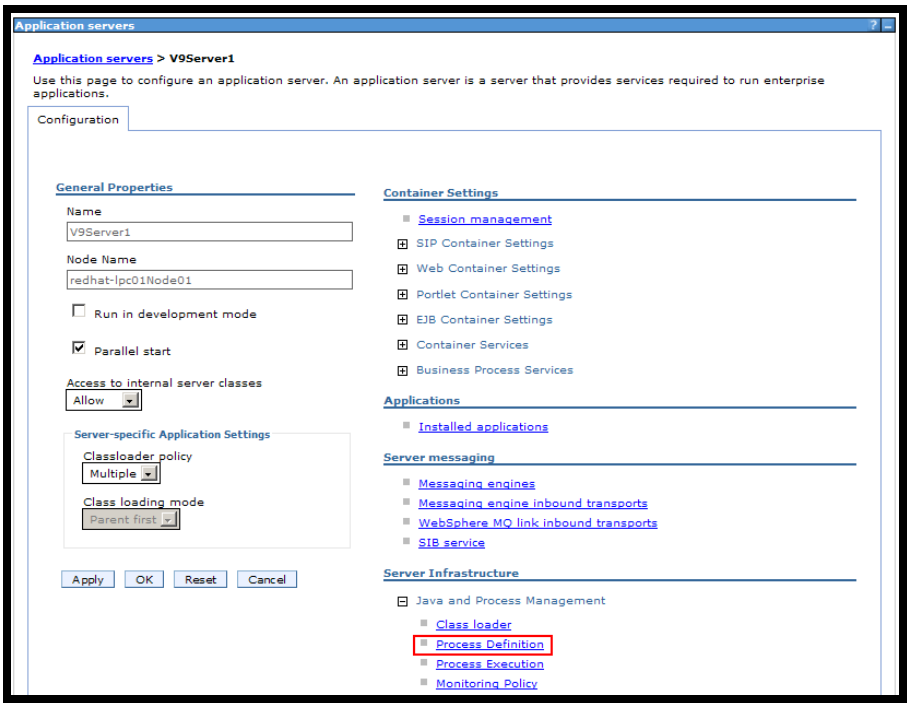
12. Select **Save**.

Figure 1-9: Apply Changes to Application Server



Server Properties

1. Click the **Name** of the server you just created. Expand out **Java and Process Management** from the right column and select **Process Definition**.



2. Under **Additional Properties** select **Java Virtual Machine**.

3. Under **Classpath** enter the location of your PaletteWebApplication.properties file. (Make sure you put a slash at the end of the file location.) This is located in the directory you created during server set-up.

4. Set **Initial** and **Maximum Heap Sizes** to 512 and 1024 respectively. These are the default recommended values. Depending on the hardware and number of servers existing or planned these values may differ.

   Note: As with the heap sizes, these values may differ depending on the system configuration.

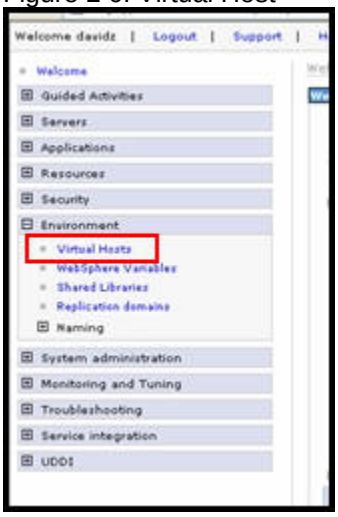
5. When finished click **OK** and **Save**.

Virtual Hosts

If you are adding another server, then the new default host port must be added.

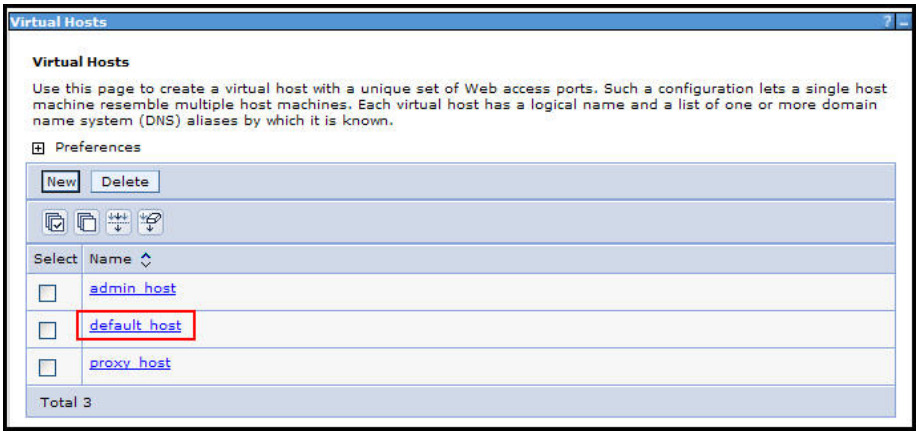
1. Select **Environment** and **Virtual Hosts** from the main menu.

Figure 2 6: Virtual Host



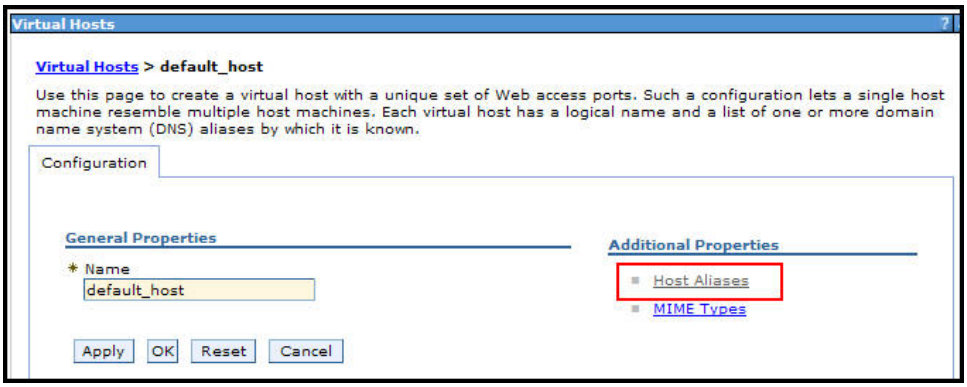
2. Select **Default Host.**

Figure 2 7: Default Host

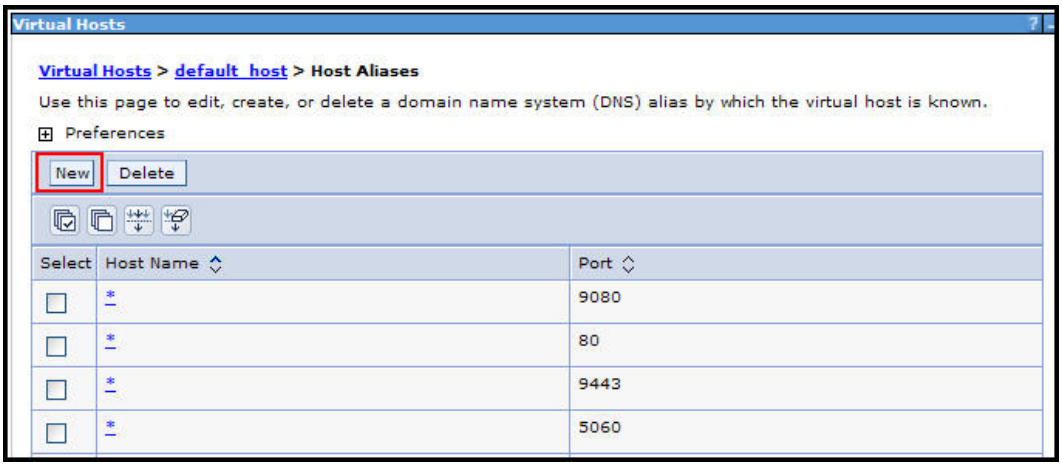


3. Select **Host Aliases**.

Figure 2 8 Host Aliases



4. Select **New**.

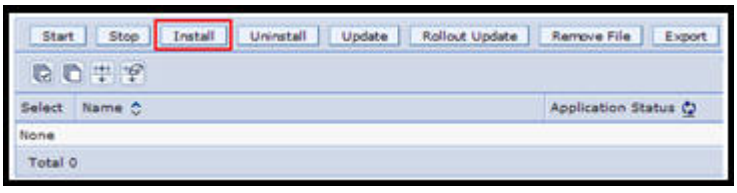


5. Change the Port to the desired number.
   - Standard is 908x where x is incremented up starting at 1 for each additional server added.
6. Click **OK**.
7. Save and Sync.

Install New Application

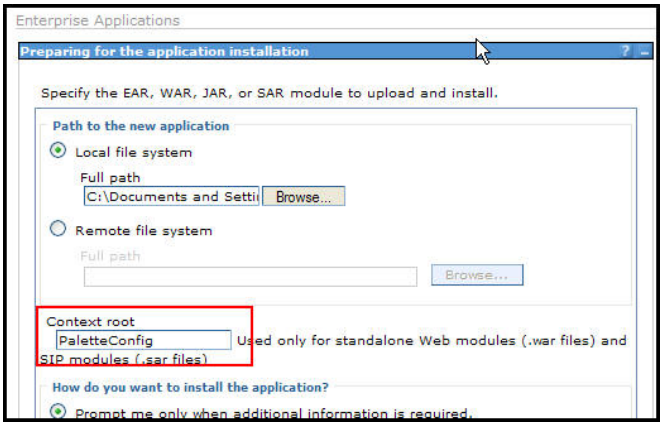
Deploy the Web Application Utility

1. Select Applications → Enterprise Application → Install.
2. If upgrading an existing Application select **Update**.

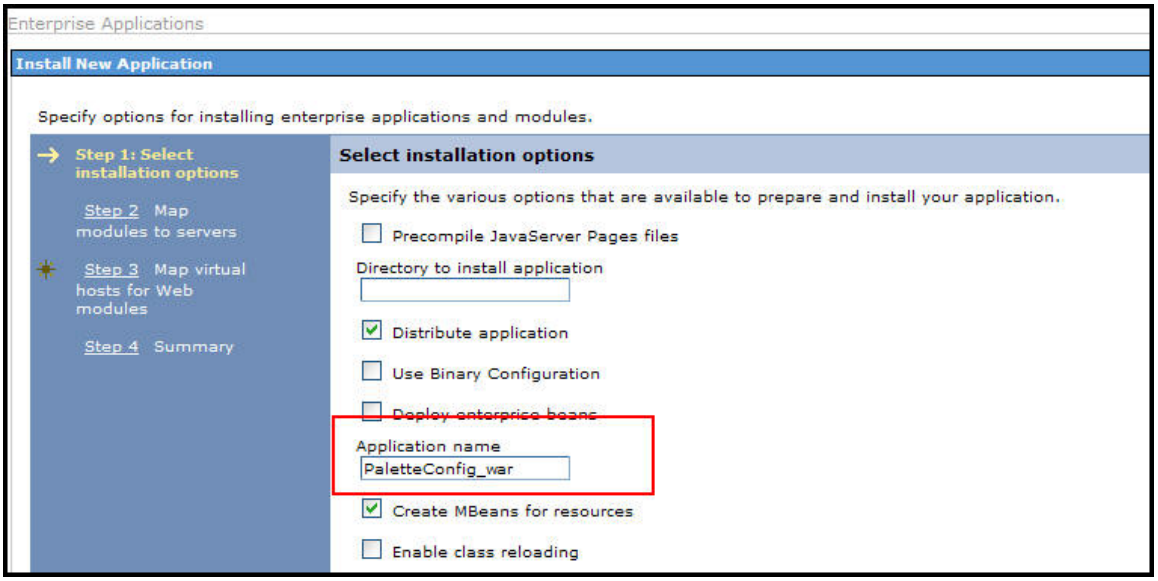


a. If uploading from your machine, under Local file system, click browse and select the **PaletteConfig.war** file.
b. If uploading from the server, select the Remote file system, and enter the path to the **PaletteConfig.war** file.

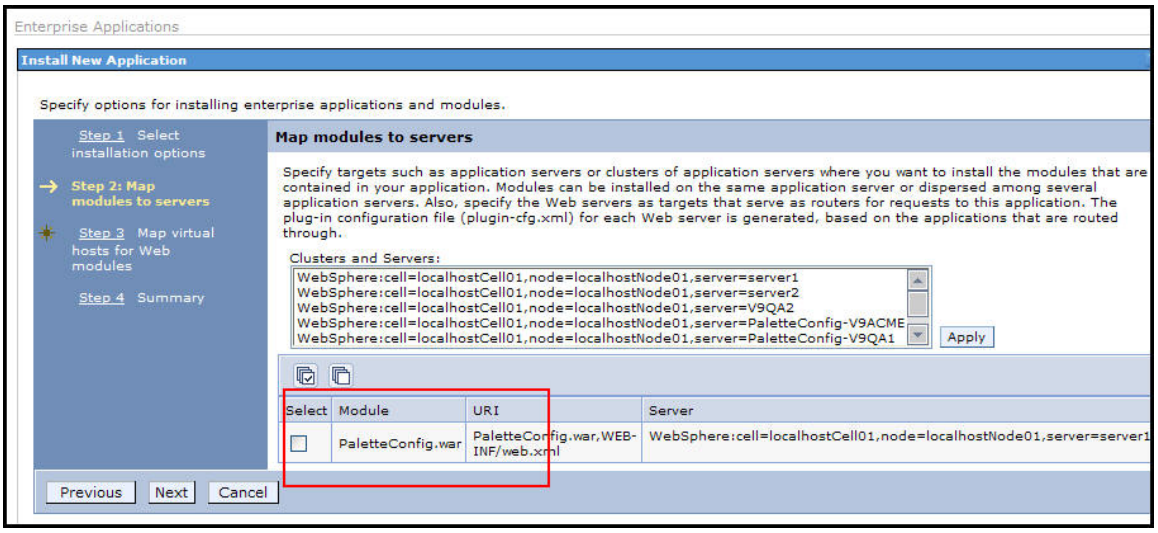
3. Set the Context root to **PaletteConfig** and click **Next**.



4. If you wish to specify **a Directory to install the application** or change the **Application name** you can do so from here, otherwise click **Next**. If you have multiple servers you will to change the **Application name** to differentiate them.



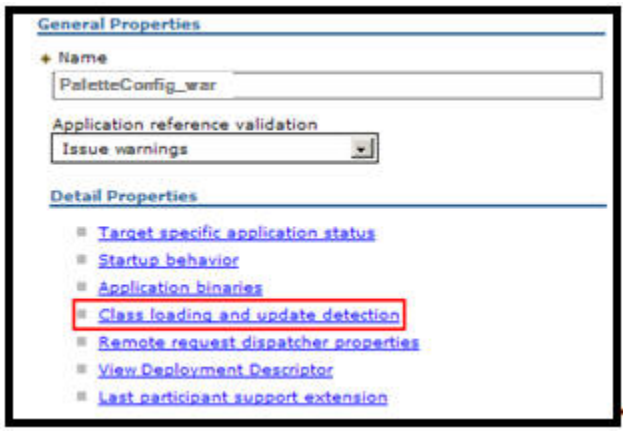
5. Click **Next**. If you have multiple servers you will have to select the server you want under **Clusters and Servers** then click the PaletteConfig.war, click **Apply** and then click **Next**.



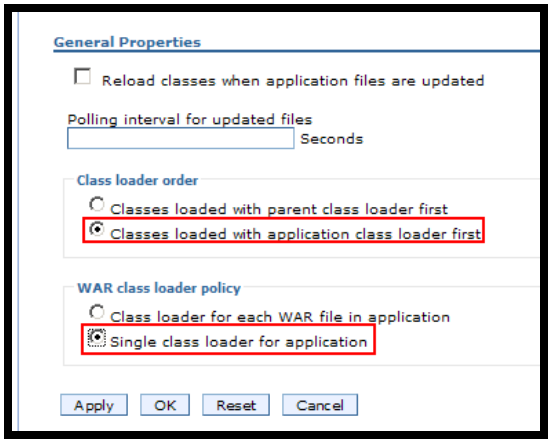
6. Review your configuration and make any necessary changes.
7. If no changes are needed click **Finish**.
8. Once installation is complete click **Save**. When Synchronization is complete click **OK**.

Configure the Application

1. Select Application → Enterprise Application → New Application just created.
2. Click **Class Loading and update detection** under **Detail Properties**.



3. Select **Classes loaded with application class loader first** and **Single class loader for application**.



4. Click **OK** and **Save**.

Start the Application

1. Select Servers → Application Servers.
2. Select the server(s) you wish to start.
3. Click **Start**.

IMPORTANT: If there are installation errors, your application will not start. Check the System.Out log for error messages. You will need to be well versed in WebSphere and JAVA to decipher the error messages. Here are a few sample locations for the System.Out log.

> **Windows**: E:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\logs\server1\
> **Linux**: /opt/IBM/WebSphere/AppServer/profiles/AppSrv01/logs/server1/

Depending on where you have WebSphere installed, the first few folders of the location may vary. In both instances above, the Application Server name is "server1". The AppSrv01 name might also differ depending on the installation of WebSphere.

4. Wait for the page to refresh and the icon under Application Status to turn to a green arrow.
5. In your browser, go to: http://**servername**:**portnumber/PaletteConfig/** replacing the **servername** and **portnumber** with the correct information.
6. The default log-in ID and password is *admin*.

IMPORTANT: This servername and portnumber is the one you should use when setting up environment properties for the Rules Palette.

IMPORTANT: Keep this application running while users access the Rules Palette or they will not be able to log-in.

You have successfully completed the installation process for the Web Application Utility. Before users can install the Rules Palette the build manager needs to configure the Rules Palette environment properties in the Web Application Utility.

Set-up Rules Palette Environment Properties with the Web Application Utility

As a Build Manager you will use the Web Application Utility to configure the environment properties and the remote debugging Web Service for the Rules Palette. When Rules Palette users create a new environment, they will only need the host name, port number, database id and password, which you will provide for them. As the Build Manager you will manage environment settings from this application.

Set-up Rules Palette Environment Settings

1. Navigate to the Web Application Utility using the following URL: http://**servername:port**/PaletteConfig/. The servername and port should be the one you used when you set-up the Web Application Utility.
2. Enter the default user name (admin) and password (admin) and select login.
3. Change the user ID and password immediately.
4. Under the Environment Options tab select **Edit**.
5. Enter the information for the environment:
    a. PaletteVersion: Enter the version of the palette that will be used. This is used to ensure the corresponding Oracle Insurance Policy Administration version is used.
    b. PaletteBuildNumber: Enter the build number of the palette that will be used.
    c. ApplicationType: Either OIPA for the Policy Administration system or NBUW for New Business Underwriting.
    d. ApplicationEnvType: Either Development or Production for the type of environment.
    e. DebuggerWebserviceUrl: http://servername:port/PASJava/service/DebuggerService?wsdl. This is the URL for the Web Service used to connect for remote debugging. The servername and port should be the same as the servername and port for the Oracle Insurance Policy Administration application.
    f. ApplicationDatabaseType: SQL Server 2005, DB2 or Oracle.
    g. ApplicationDatabaseServer: Server where the database is located.
    h. ApplicationDatabasePort: Port for database.
    i. ApplicationDatabaseName: Name of the database. Only needed for SQL Server 2005 and DB2.
    j. ApplicationDatabaseSchema: Schemas of the database. Only needed for DB2.
    k. ApplicationSID: Only needed for Oracle.

6. Select the Yes radio button for IVS if you will be using an IVS environment.
    a. Enter the IVS environment information.
    b. IVSDatabaseType: SQL Server 2005 or Oracle.
    c. IVSDatabaseServer: Server where the database is located.
    d. IVSDatabasePort: Port of the database.
    e. IVSDatabaseName: Name of the database.
    f. IVSDatabaseSchema: Schema of the database.

g. IVSEnv: Name of the IVS environment that will be used.
h. IVSTrackNumber: Track number of the IVS environment that will be used.

7. Select **Save**.
8. Send the host and port information and database ID and passwords to the Rules Palette users so that they can set-up the environment.

You have successfully completed the environment properties set-up for the Rules Palette. You can now install the Rules Palette application.

Rules Palette Installation

The Rules Palette can only be installed after the Web Application Utility has been used to set-up the environment properties.

Prerequisites

- Servername provided by the build manager or server administrator who installed the Web Application Utility.
- Portnumber provided by the build manager or server administrator who installed the Web Application Utility.
- Database ID and passwords provided by the build manager or server administrator who installed the Web Application Utility.
- .zip file from E-Delivery. The latest release of the Rules Palette is available via a .zip file, which can be accessed at Oracle eDelivery http://edelivery.oracle.com/. After you log into the E-Delivery site, the Media Pack Search screen will appear. Select Product Pack: Oracle Insurance Application and Platform: Microsoft Windows (32 bit). Once you select the **Go** button, a list of Oracle's Insurance Applications will display. Select **Oracle Insurance Rules Palette**. The applications will display with a download button next to each one. Select the download button for **Oracle Insurance Rules Palette**.
- JDBC file. Instructions for downloading this file are included in the steps below.

Install the Rules Palette

1. Extract the .zip file downloaded from E-Delivery and save the files to your local computer in the folder of your choice. Sample is shown below.
   - *C:\Program Files\Oracle\RulesPalette*

2. Download the necessary .jar files. The type of database you are using will determine the .jar files you need to download. It is recommended that a temporary subdirectory be created to house the downloaded .zip files.
   - Oracle database – no .jar files to download
   - SQL Server database – download the **jtds.jar** file
     a. Download **jtds** from the following site: http://sourceforge.net/projects/jtds/.
     b. Click **Download** on the top menu bar.

c. Click the **download** link for jtds (release 1.2.2).
d. Select the jtds-1.2.2-dist.zip file. Save the download .zip file to the temporary directory created to store the .zip files.
e. Open the downloaded .zip file and extract the file **jtds-1.2.2** from the root of the .zip file.
f. Rename the file **jtds.jar**.
g. Copy the jtds.jar file into the following folder:
C:\Program Files\Oracle\RulesPalette\asgraphicalruleside\modules\ext

3. Launch the Rules Palette via Executable File. Once unzipped, the executable file **asgraphicruleside.exe** will run the Rules Palette. To launch the application, double-click on the executable file. This executable file can be found in the following directory:
C:\Program Files\Oracle\RulesPalette\bin
4. The default log-in ID and password is *install*.
5. Create a shortcut on the Windows XP. You should create a shortcut on your desktop to the executable file so that it is easier to access the Rules Palette.

Note: Once you launch the Rules Palette, make sure to delete any old/existing environments.

Refer to the Rules Palette Help System for information on setting up environment connections and for instructions on operating the Rules Palette.

You have successfully installed the Rules Palette application.