

Rules Palette User Installation Guide

*Oracle® Insurance Rules Palette
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Oracle® Insurance Rules Palette

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Introduction

The Rules Palette can be downloaded from the Rules Palette Web Application Utility. Your build manager will send the servername and port of the Web Application Utility, which you will plug into a URL. You will also receive two sets of user IDs and passwords from the build manager so that you can create an environment connection and log-in to the application once it has been downloaded onto your computer.

When you open the Rules Palette for the first time, you need to create an environment connection. The servername and port are needed for this step as well. After you have downloaded the Rules Palette and configured the environment connections, you will be able to begin working in the application.

Prerequisites

- Servername and port for the Rules Palette Web Application Utility. This will come from your build manager.
- Rules Palette log-in user ID and password. This will come from your build manager.
- Database user ID and password. This will come from your build manager.
- IVS database user ID and password. This will come from your build manager.

Installation

The following steps describe the procedure for downloading the Rules Palette from the Rules Palette Web Application Utility.

Steps to Download the Rules Palette

1. In your browser, go to `http://servername:portnumber/PaletteConfig/` replacing the **servername** and **portnumber** with the correct information from your build manager.
2. Click **Download Palette Version**.

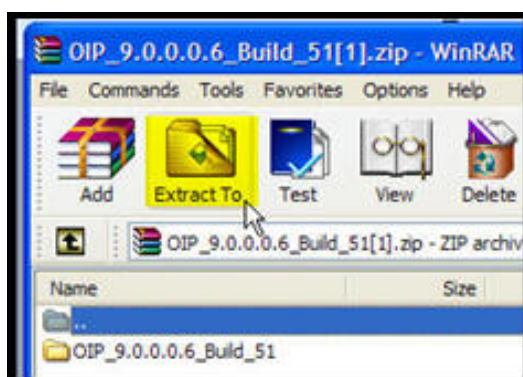


- Click **Download** next to the version of the Rules Palette that you want to download.



- Click **Open** from the File Download window when it asks what you want to do with the file. It will take a few minutes for the file to download. Once the file has been downloaded, it should automatically open with the compression software that is available on your system. If you do not have compression software, such as WinRAR or WinZip, contact your IT department.
- Extract the files using your compression software and save the files to your local computer in the following folder:

C:/Program files/Oracle/RulesPalette



Note: You may need to create a folder called Rules Palette within C:/Program Files/Oracle if one does not already exist.

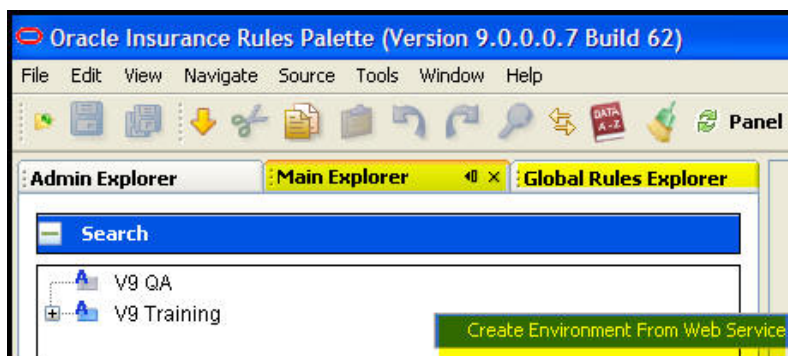
- Download the necessary .jar files. The type of database you are using will determine the .jar files you need to download. It is recommended that a temporary subdirectory be created to house the downloaded .zip files.
 - Oracle database – no .jar files to download.
 - SQL Server database – download the **jtids.jar** file.
 - Download **jtids** from the following site: <http://sourceforge.net/projects/jtids/>.
 - Click **Download** on the top menu bar.
 - Click the **download** link for jtids (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
7. Launch the Rules Palette via the executable file **asgraphicruleside.exe**. This file 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
8. 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. To create a shortcut, right-click on asgraphiculeside.exe (*C:/Program Files/Oracle/RulesPalette/bin*) and select **Create Shortcut**. Once the shortcut appears, drag it out onto your desktop.

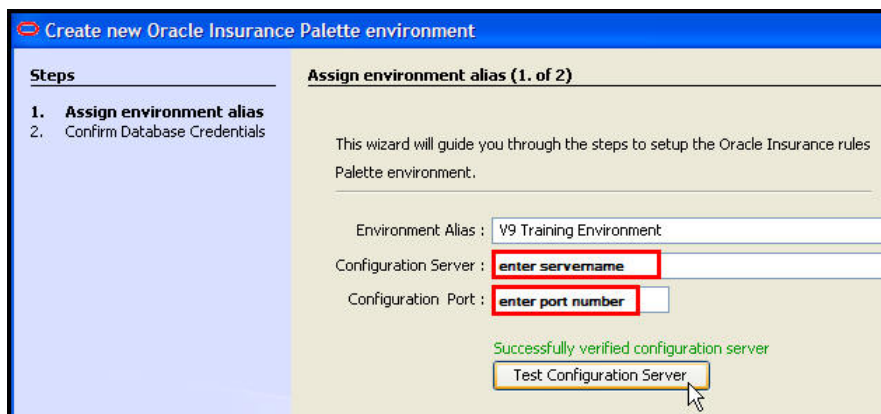
Note: Once you launch the Rules Palette, make sure to delete any old/existing environments.

Steps to Create an Environment Connection

1. Double-click the Rules Palette shortcut icon you created on your desktop.
2. Click the **Main Explorer** tab.
3. Right-click anywhere in the tab and select **Create Environment from Web Service**. The environment creation wizard will open.



4. Enter an Environment Alias. This should be a descriptive name for the environment that will allow you to distinguish between the various environments you create.
5. Enter the Configuration Server information provided by the Build Manager.
6. Enter the Configuration Port information provided by the Build Manager.
7. Click **Test Configuration Server** to test your environment connection. If the connection is successful, click **Next**.



8. Browse to the location of the jdbc driver files. SqlServer uses the **jtids.jar**. The files should be in the following folder:
C:\Program Files\Oracle\RulesPalette\asgraphicalruleside\modules\ext
 You will only need to specify the .jar file location the first time you set-up an environment. If you create additional environments, this Browse field will not display.
9. Enter the **User ID** and **password** for the OIPA database. The build manager will send this information to you. This is different from the user ID and password you will use to log-on to the Rules Palette.

10. Enter the **User ID** and **password** for the IVS database. The build manager will send this information to you. This is different from the user ID and password you will use to log-on to the Rules Palette.
11. Click **Test Connection** to test your connection. Once both connections are successful, click **Finish**.
12. Right-click on the new environment and select **Log-on**.
13. Enter your Rules Palette user ID and password, which are provided by the build manager, and select **OK**.

Steps

1. Assign environment alias
2. Confirm Database Credentials

Confirm Database Credentials (2. of 2)

Environment : V9 Training Environment

Type :

Debug WebService :

OIPA Database : SQLServer2005

Enter the location for the SQLServer2005 JDBC .jar file above

Host :

Database Name :

User ID :

Password :

IVS Database

Host :

IVS Database Name :

Environment Name : Track :

User ID :

Password :

Annotations:

- Enter database user ID and log-in. This is different from your log-in ID and password.
- Enter IVS database log-in ID and password. This is different from your log-in ID and password.