

**Oracle Insurance**

**Insbridge Rating and  
Underwriting  
Installation and  
Upgrade Guide**

Release 4.0.1

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Oracle Insurance Insbridge Rating and Underwriting Installation and Upgrade Guide

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## PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting Installation and Upgrade Guide*. The Insbridge Rating and Underwriting (IBRU) System is a browser-based, multiplatform insurance rating and underwriting technology solution that provides integrated management for every aspect of the rate definition and modification process. This guide will help with the installation of the Insbridge Rating and Underwriting System.

## AUDIENCE

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

## TYPES OF INSTALLATION

There are various types of installations:

### Windows Only Installation

- **Full RateManager Installation** – This installation will install RateManager and the Insbridge Framework Administrator (IBFA). This is for a Windows only environment, using a SQL Server database.
- **SoftRater Node Installation** – This installation is for existing environments that want to add a Windows SoftRater node to an environment.
- **Database** – Incorporating an Oracle Database in a Windows Environment.

### Incorporating a Java Environment

- **Full SoftRater Installation on a Java Machine** – This installation will install SoftRater on a Java machine, using a SQL Server database.
- **Full SoftRater Installation on a Java Machine** – This installation will install SoftRater on a Java machine, using an Oracle database.

### Upgrading

- **Upgrade** – This installation is for existing customers and will take their current version of IBRU up to version 4.0.1.

**This guide will describe a Windows Only installation, Incorporating an Oracle Database and Upgrading.**



## E-Delivery

The Insbridge Rating and Underwriting (IBRU) System 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 IBRU 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 IBRU documentation will be loaded has a PDF reader.

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

The installation downloads you can select are:

- **Insbridge IBRU Install** – This is required for all installations
- **SoftRater for WebSphere** – This is required if you are using WebSphere
- **SoftRater for WebLogic** – This is required if you are using WebLogic
- **SoftRater for Jboss** – This is required if you are using Jboss
- **Documentation** – It is recommended that you download the documentation. Installation guides and user guides are located here.

The **Insbridge IBRU install** is required for all installations.

The **4.0.1-Insbridge-IBRU folder contents:**

- **Databases**
  - Oracle
    - SoftRater – IBSR
      - o Usp\_IBSR\_v03.12.0.oracle
  - SQL Server
    - RateManager – IBRM
      - o Latin1\_General\_BIN
        - DATABASE\_BACKUP\_IBRM\_TEMPLATE\_CASE\_SENSITIVE.bak
      - o SQL\_Latin1\_General\_CP1\_CI\_AS
        - DATABASE\_BACKUP\_IBRM\_TEMPLATE.bak
    - Security – IB\_CLIENT
      - o SQL\_Latin1\_General\_CP1\_CI\_AS
        - DATABASE\_BACKUP\_IB\_CLIENT\_TEMPLATE.bak
    - SoftRater – IBSR
      - o Latin1\_General\_BIN
        - DATABASE\_BACKUP\_IBSR\_TEMPLATE\_CASE\_SENSITIVE.bak
      - o SQL\_Latin1\_General\_CP1\_CI\_AS
        - DATABASE\_BACKUP\_IBSR\_TEMPLATE.bak
      - o Usp\_IBSR\_v03.13.0.sql
  - **IE7 Users**
    - Insbridge IE7 Active X Control Update PDF
    - RateManager\_IE7.exe
  - **Oracle BI Publisher**
    - OBI\_PUBLISHER.exe
  - **Oracle Client**
    - Oracle\_client.exe
  - **Oracle Insurance – Insbridge Rating and Underwriting.exe**

You will be required to run the installation file and create the IB\_CLIENT database for any new installation. The other folders and files may not be needed, depending upon the kind of setup you want. Everything for a Windows only installation is in the **4.0.1-Insbridge-IBRU** folder. If you want to incorporate a Java environment, please download the corresponding SoftRater file. SoftRater downloads are not required if you are running in Windows only.

## Definitions

Some commonly used terms when installing or using the Oracle Insurance Insbridge Rating and Underwriting system:

- **IBRU** – Insbridge Rating and Underwriting System. This is the entire system.
- **IBFA** – Insbridge Framework Administrator. IBFA is an administrative tool used to configure Insbridge applications and setup RateManager database connections. IBFA will be located on a Windows Server machine. IBFA/SR-WIN is an Insbridge Framework Administrator/SoftRater for Windows.
- **IBSS** – Insbridge SoftRater Server. IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within IBRU that executes the rules, rating and underwriting instructions as defined by the user in RateManager. IBSS is usually located on a Java machine. IBSS/SR-JAVA is an Insbridge SoftRater Server/SoftRater for Java.
- **SoftRater Node** – A SoftRater node is either an IBFA (without RateManager) or IBSS instance on a physical environment.
- **RM** – RateManager. RateManager is a component within IBRU that enables users to manage the product definition and modification process, including rating and underwriting logic.
- **SR** – SoftRater. The engine that executes the rating, rules and underwriting instructions defined within RateManager. The rating environment for runtime execution and processing of business content. SoftRater can be further defined by the operating system where it has been loaded.
- **SR-WIN** – SoftRater for Windows. This is also another name for IBFA.
- **SR-JAVA** – SoftRater for Java. This is also another name for IBSS.
- **SRP** – SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.
- **VFS** – Virtual File Servers. Virtual file server management allows you to access environments that are located on other machines in different locations where packages can be downloaded.
- **Package Location** – A pointer to a location where SoftRater Packages (SRP's) are stored.
- **Physical Environment** – A physical environment is generally referred to as a physical machine.

- **Authoring Environment** – The physical machine where RateManager is installed.
- **Rating Environment** – The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
- **Logical Environment** – An environment created for a subscriber in IBFA. It defines package location, engine location and database location in addition to several other supporting data items. This environment is used for rating and/or SRP management. Each database connection will have a logical environment.

## Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1 <sup>st</sup> Edition	P01-701-01		03/28/2005	Updated for new layout / Windows 2003
2 <sup>nd</sup> Edition	P01-701-02		04/14/2005	New layout, updated ASPNET user permissions req
3 <sup>rd</sup> Edition	P01-701-03	V 3.6	03/14/2006	Update
4 <sup>th</sup> Edition	P01-701-04	V 3.7	09/28/2006	Update
5 <sup>th</sup> Edition	P01-701-05	V 3.8	July 2007	Update
6 <sup>th</sup> Edition	P01-701-06	V 3.8.3	October 2007	Update
7 <sup>th</sup> Edition	P01-701-07	V 3.8.5	November 2007	Update
8 <sup>th</sup> Edition	P01-701-08	V 3.8.7	January 2008	Update
9 <sup>th</sup> Edition	P01-701-09	V 3.8.8	March 2008	Update
10 <sup>th</sup> Edition	P01-701-10	V 3.9	May 2008	Update
11 <sup>th</sup> Edition	P01-701-11	V 3.10	September 2008	Update
12 <sup>th</sup> Edition	P01-701-12	V 3.11	December 2008	Update
13 <sup>th</sup> Edition	P01-701-13	V 3.12	July 2009	Update
14 <sup>th</sup> Edition	P01-701-14	V 3.13	December 2009	Update
15 <sup>th</sup> Edition	P01-701-15	R 4.0	April 2010	Update
16 <sup>th</sup> Edition	P01-701-16	R 4.0.1	August 2010	Update Release

# PLANNING YOUR IBRU SYSTEM

Prior to installation, you should have an idea of the type of setup you want to create. What kind of equipment do you have available and how many environments do you need? If you do not have everything completely planned out, you can still proceed. Environments can be removed or added later on. The Oracle Insurance Insbridge Rating and Underwriting system (IBRU) is expandable and can accommodate a few different configurations.

## Databases

RateManager and IBFA require a SQL Server database. RateManager and IBFA can utilize either SQL Server 2005 SP/2 or 2008 SP/1. SoftRater can use a SQL Server 2005 SP/2 or 2008 SP/1 database, an Oracle 10g or 11g database or an IBM DB2 v9.1 database or a combination of databases. SQL Server can be the only database system used. No other database system is required; however another database system can be used if you want.

For the examples in this guide, physical environments that use SQL Server will have one database per environment. For Oracle or DB2, QA and Production will share a database.

For use in this installation guide, SQL Server will refer to either SQL Server 2005 SP/2 or 2008 SP/1. Differences between SQL Server 2005 SP/2 and 2008 SP/1 will be pointed out where they occur.

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**NOTE:** *While it is possible to have RateManager, IBFA and SQL Server all on the same machine, it is not recommended due to performance and security issues. This option will not be discussed in this document.*

---

## Physical Environments

A physical environment generally refers to a physical machine where a specific activity is performed. For example, a physical environment called development could be created where users only create rating programs. Another physical environment called QA could be where users only test ratings. There is no limit to the number of physical environments you can have.

It is recommended that three physical environments be setup; one for development, one for testing or quality assurance (QA) and one for production.

- **Development** – this environment holds RM and an IBFA instance on the same Windows Server machine and will utilize a SQL Server database. This environment is most often used for the creation of rating and underwriting logic. Once development is complete, SRPs will be copied into a QA environment.
- **QA** – this environment can contain either an IBFA instance or an IBSS instance, depending upon the database and machine to be used. If a Windows machine is used, an IBFA instance will be installed. If a Java machine is used, an IBSS instance will be installed. This environment is most often used for the testing of SRPs prior to being placed into Production. Once testing is complete, SRPs will be copied to production.

- **Production** – this environment can contain either an IBFA instance or an IBSS instance, depending upon the database and machine to be used. If a Windows machine is used, an IBFA instance will be installed. If a Java machine is used, an IBSS instance will be installed. This environment is most often used for rating.

## Authoring Environment

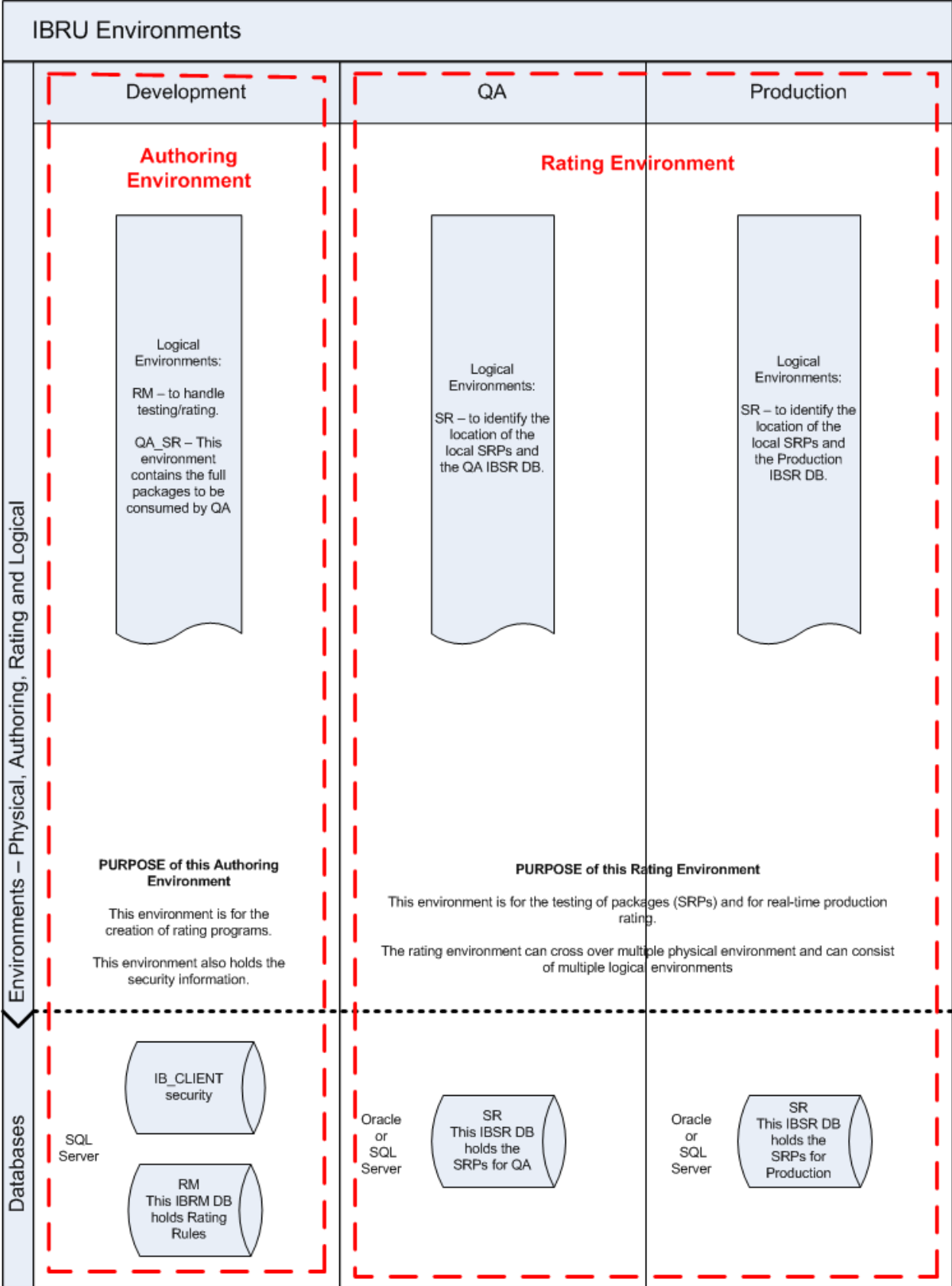
The authoring environment is the physical machine where RateManager is installed. This machine must be a Windows Server machine and must utilize a SQL Server database.

Although it is possible to have more than one authoring environment, it is recommended that only one authoring environment be setup in development.

## Rating Environments

The rating environment is comprised of the physical machines where SoftRater is installed. You can have multiple machines in a rating environment.

One rating environment should be setup encompassing testing or quality assurance (QA) and production.



## Logical Environments

A logical environment is an environment created for a subscriber in IBFA or IBSS. This environment is used for rating and/or SoftRater package (SRP) management. The logical environment defines package location, engine location and database location in addition to several other supporting data items.

When you create logical environments, you enter the package storage locations. These are the system folders where SoftRater packages (SRP) are stored. When an SRP is created, the file is stored in the folder location configured in the environment that the package was created for.

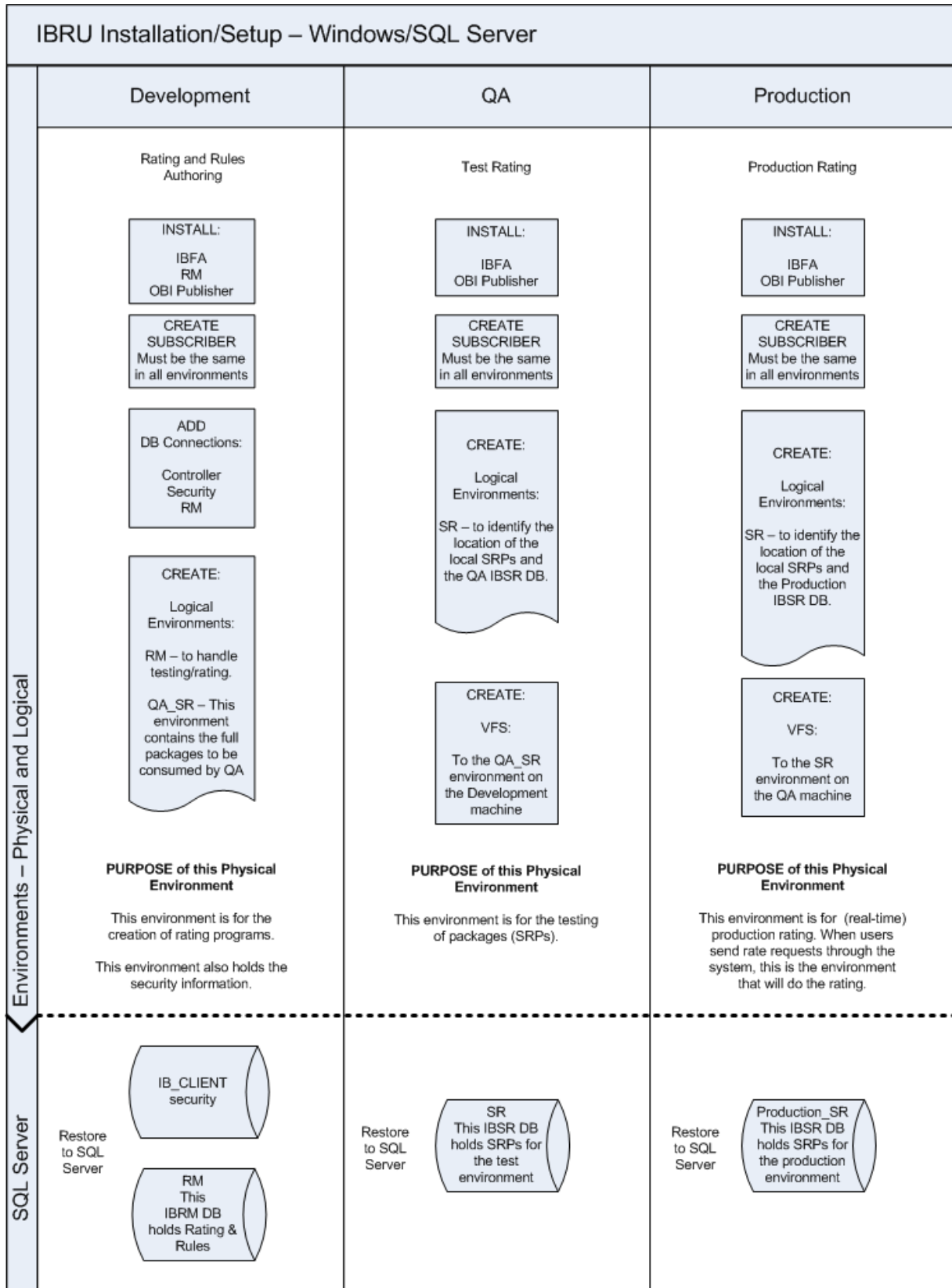
When a program is ready to go from development to the QA environment, the SRP will be placed in the folder location that was designated for the logical environment selected. An SRP can be copied from one logical environment to another from the SRP listing screen in IBFA. SRP's can also be copied from a different physical machine (that has IBFA installed) by creating a Virtual File Server.

In a Java environment, the rating environment IBFA will handle the copying and loading. No Virtual File Server will be created. IBFA does the package management and migration. This can only be performed by IBFA. Java environments are for rating only.

You can create as many logical environments as you want to manage.

It is recommended that at least two logical environments be configured in IBFA, one for RateManager and one to represent the QA environment and folder location of the SRPs. It is recommended that at least one logical environment be setup in testing or quality assurance (QA) and one for production.

## A Windows Only Environment Example:





This example has three physical environments each with its own application machine and database machine. It is possible to put all SQL Server databases on one database machine or divide over two machines. If you select to use one or two SQL Server database machines, clear and precise naming of the associated databases is recommended.

RateManager and IBFA must run on a Windows Server machine. No other operating system will be required. RateManager will be installed on the Development machine only.

---

**NOTE:** *While it is possible to have RateManager, IBFA and the database server all on the same machine, it is not recommended due to performance and security issues. This option will not be discussed in this document.*

---

**The setup for this example is:**

1. All three instances of IBFA will need to be configured the same.
2. In the **Development** environment:
  - a. RateManager and IBFA/SR-WIN would be located on the same Windows machine.
  - b. On the IBFA/SR-WIN for this environment, three database connections would be created and two logical environments would be created.
  - c. Two databases would be restored to a separate SQL Server machine.

An example of this environment setup/installation is on page 22.

3. In the **QA** environment:
  - a. IBFA/SR-WIN would be located on a Windows machine.
  - b. On the IBFA/SR-WIN for this environment, one logical environment and one virtual file server would be created.
  - c. One database would be restored to a separate SQL Server machine.

An example of this environment setup/installation is on page 53.

4. In the **Production** environment:
  - a. IBFA/SR-WIN would be located on a Windows machine.
  - b. On the IBFA/SR-WIN for this environment, one logical environment and one virtual file server would be created.
  - c. One database would be restored to a separate SQL Server machine.

An example of this environment setup/installation is on page 53.

You can add another environment if necessary. For example, if you wanted to create a training environment or a second level of testing, you could add these environments in where you wanted.

There are other combinations of application servers and databases that you can use. Please contact your Insbridge representative for more information on the configuration that you would like to have.

---

**NOTE:** For the examples in this guide, the QA and Production environments will be exactly alike to allow for true QA standards.

---

# SYSTEM REQUIREMENTS

## Server Requirements

A full installation of Microsoft Windows Server is required for IBFA/SR-WIN and RateManager installations. IBRU installers should be familiar with managing a Windows server. For help with verifying or installing required components, please see Windows 2003 Settings and Permission Notes on page 111. For a 64-bit machine, please see Insbridge Installation for 64-bit.

## Required Components

The following components are required:

- **Microsoft .NET Framework version 3.5**
- **IIS – Internet Information Services version 6.0 or 7.0**
- **For Windows 2008 Server – WCF http activation needs to be enabled**
- **MSMQ – Microsoft Message Queuing Services – basic functionality only.**
- **JRE – Java Runtime Environment** (not required for a SoftRater Node only install)

## Extended Permission Required by the Insbridge User

In order to start the Insbridge services from IBFA, the Insbridge user must be given full access to both the Insbridge Message Service and the Insbridge Task Manager Service. If the Insbridge user account will not have full administrative permissions on the server where the Insbridge Framework is installed, then certain operations from IBFA will not be available. A system administrator may be required to start the Insbridge services from the server.

## Microsoft SQL Server

Microsoft SQL Server should not be installed on the same machine where the Insbridge web applications reside. The SQL Server should reside on a separate host from the IBRU web front end with a properly configured network connection from the web server front end to SQL Server. Testing can be performed by using the Data Sources application in Administrative Tools to make a default connection to the database server.

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**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.*

---

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*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, the databases can be placed on a separate SQL Server machines that can either be independent or shared as long as the following conditions are met.

- **Server Authentication:** Should be set to SQL Server and Windows Authentication mode.
- **Collation and Sort Order:** Currently supported is the default SQL Server collation using SQL\_Latin1\_General\_CP1\_CI\_AS and sort order plus case sensitivity using Latin1\_General\_BIN as the server collation. The security database (IB\_CLIENT) supports the default SQL Server collation using SQL\_Latin1\_General\_CP1\_CI\_AS. The RateManager and SoftRater databases can use either case sensitive or non-case sensitive. Please check with Oracle Insurance for any questions regarding database server sort orders or collations.

---

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

---

## Special Considerations for SQL Server in a Java Setup

For **Java setups only** when connecting to SQL Server from IBSS:

- **For New Installations:** No action is required.
- **For Upgrades:** If you want to keep the current Environment settings that are in IBSS, there are additional steps that need to be performed. Please see the SQL Server Upgrade chapter in the corresponding SoftRater Installation Guide for the exact steps.

If you are running a Windows only environment, no additional steps will be required. This is only for SoftRater for WebLogic, SoftRater for WebSphere and SoftRater for JBoss.

## Default SQL Server Database User Roles and Permissions Required

If a more granular approach is required for management of security of the IBRU databases, then the following guidelines can be used to set the required permissions.

---

**NOTE:** *These are only guidelines. If not properly configured, certain processes within the Insbridge Rating and Underwriting System will fail. An experienced database administrator's expertise is highly recommended before making any security changes.*

---

- **IBSR Database User** – Account requires database owner (DBO) access to the IBSR databases because new tables will be created in the SoftRater (IBSR) database dynamically when or if a new line of business SRP (SoftRater Package) is loaded to the SoftRater system.
- **IBRM\_xxxx and IB\_CLIENT Database User** – Account requires execute access against the Insbridge stored procedures and full access to the Insbridge schema.

## INSBRIDGE LOCAL USER ACCOUNT SETUP

**Before starting the installation**, create a local user account where the Insbridge Framework is being installed. This user needs to be a member of the User group and requires certain privileges in order to fully control the entire IBRU environment. For ease of installation and if the server is dedicated to the Insbridge Rating and Underwriting System, it is suggested that this user be added to the local machine Administrators group.

If the installer has permissions, an Insbridge user can be created during the installation.

### To create a new user:

1. Right click the My Computer icon on the desktop.
2. Select Manage from the drop down list.
3. Select Local Users and Groups.
4. Select Users.
5. Right click on the right side of the screen.
6. Select New User.

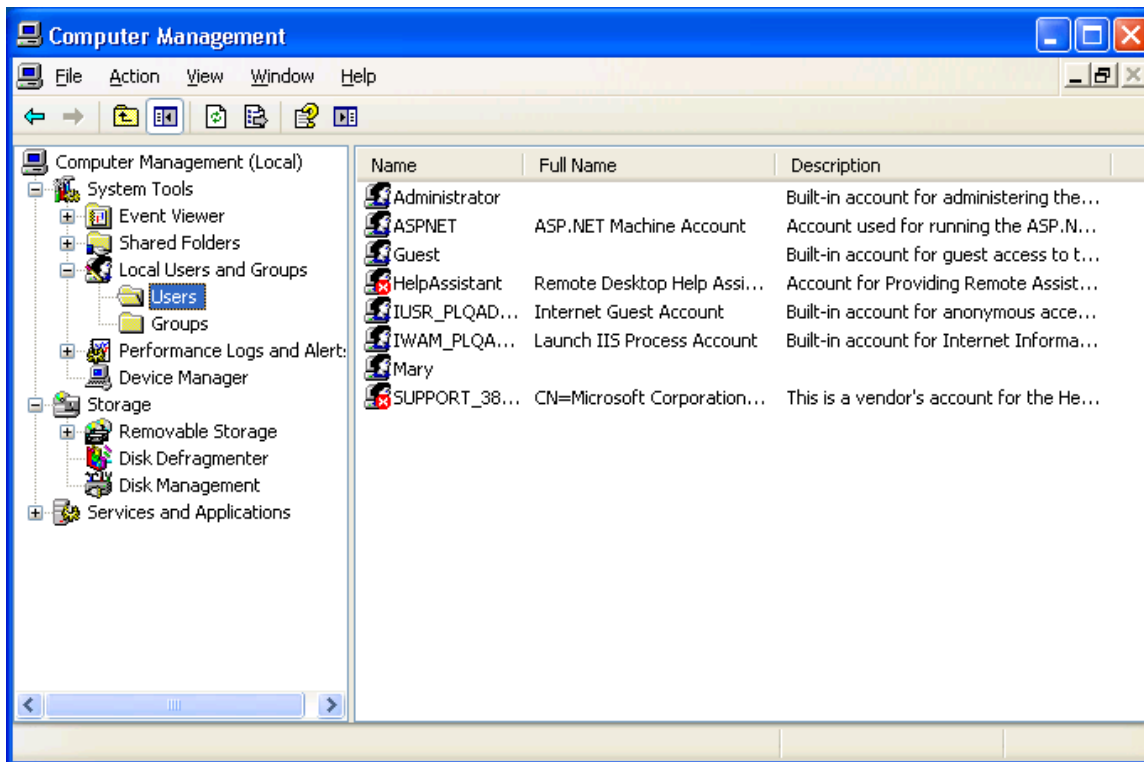


Figure 1 Creating New User

7. Add a new Insbridge user. The Insbridge User should be assigned to the local Users group and have the same permissions as the internet guest account.

Ideally, the Insbridge user should be added to the local Administrators group. If the Insbridge user cannot be a part of the local administrators groups, please make sure that the Insbridge user has permissions on the Insbridge Messaging Service and the Insbridge Task Manager Service.

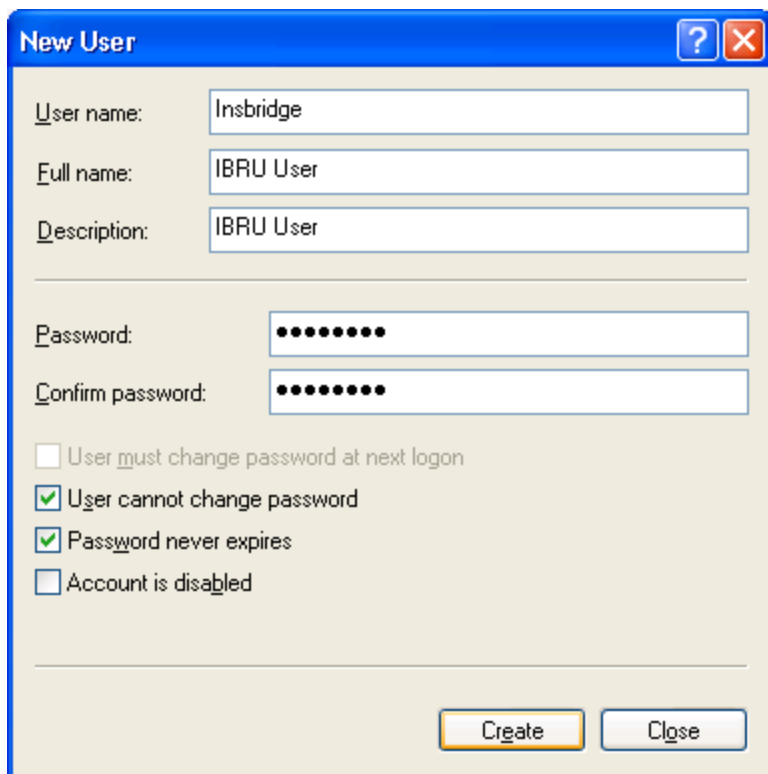


Figure 2 Adding User information

8. Click **Create**. You can close out computer management. Please keep this information close at hand. You will need it for the first installation.

#### To create a new user in Windows Server 2008:

1. Select Start→Administrative Tools→Server Manager.
2. Select Configuration→Local Users and Groups.
3. Select Users.
4. Right click and select **New User**. Add an Insbridge User.
5. Click **OK**.

#### Insbridge User Password

The password can be set to any password that meets your company standards. The IBRU administrator must make note of the password for future configuration.

For ease of maintenance, the IBRU user should not have to change the password and the password should never expire.

---

**NOTE:** Please note that if your company requires passwords to be re-set, you will have to make changes to the COM+ Application libraries after you change your password. The installation will automatically apply the Insbridge user name and password to the necessary libraries. If you change the password, you will have to change the password in all three of the Insbridge Com+ libraries. On each library, right click, select Properties, select the Identity tab, and enter in the new password.

---

## FULL RATEMANAGER INSTALLATION

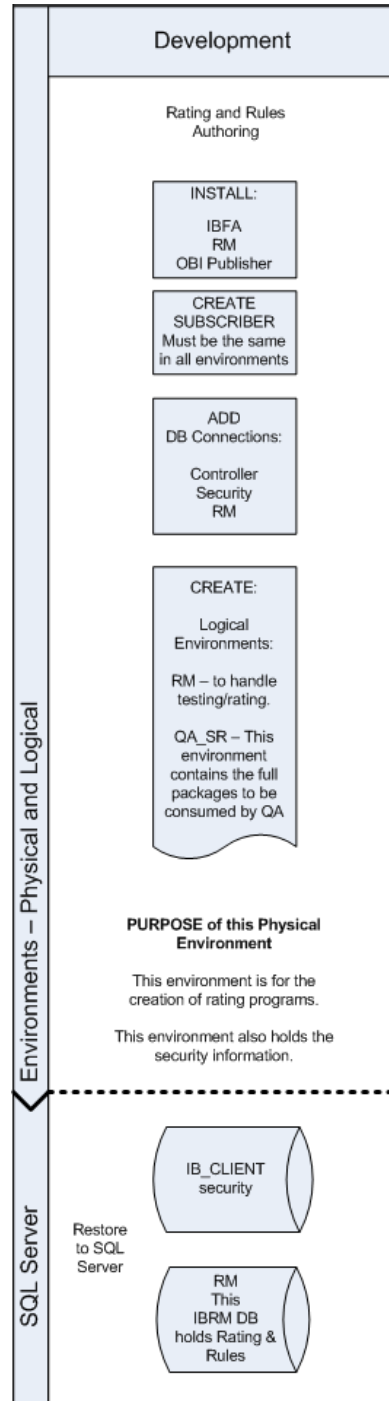
This installation will install RateManager and the Insbridge Framework Administrator (IBFA). This is for a Windows only environment, using a SQL Server database.

Before installing, please verify that the system requirements are in place.

The installation should be performed in the following order:

1. Install the IBRU application.
2. Registry Access.
  - a. Assigning Insbridge Access.
  - b. Exporting Key for safe keeping.
3. Assigning permissions to the Insbridge User for the Windows Temp Folder. This is necessary for MSMQ
4. Assigning permissions to the Insbridge User for the Insbridge Folder
5. Creation of the IBRU databases is next. There are two databases that must be in place.
  - a. IB\_Client
  - b. IBRM
6. Return to IBFA and Configure:
  - a. Create your subscriber.
  - b. Add database connections.
  - c. Create your logical environments.
7. Verifying Component Services.
8. Allowing for WCF Activation. **FOR WIN 2008 ONLY.**
9. Install OBI Publisher.
10. Login to RateManager and perform IBRU database updates.

**For a Windows 2008 Server installation, you must run as Administrator.**



## STEP 1 – INSTALL INSBRIDGE RATING AND UNDERWRITING

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

---

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

---

---

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

---

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

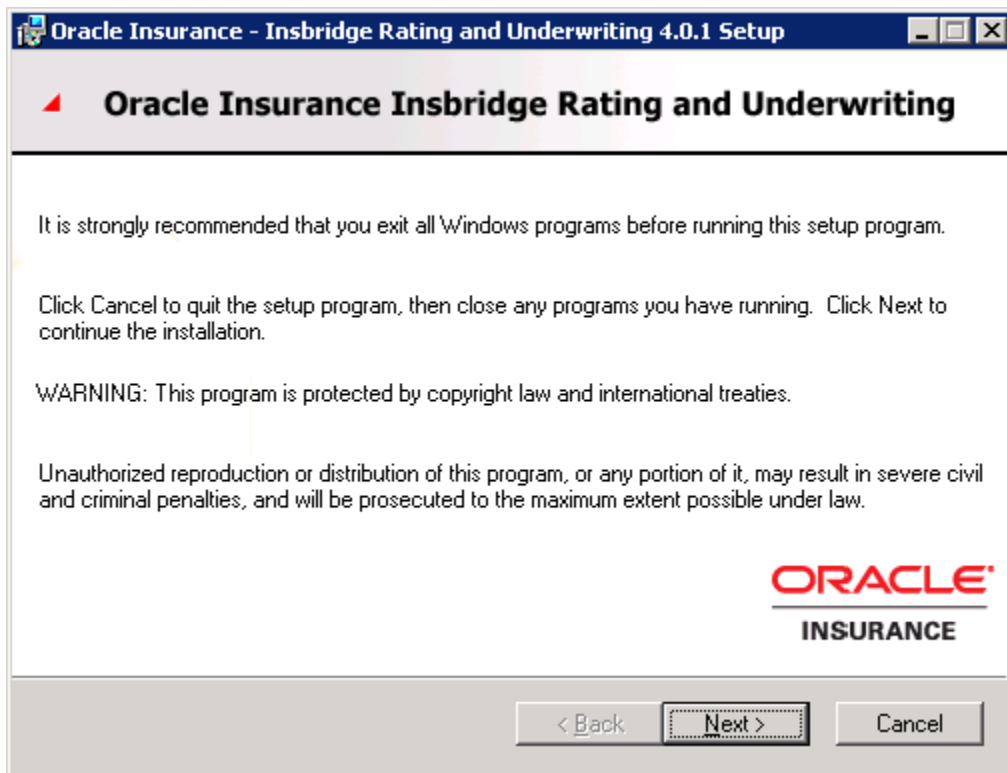


Figure 3 Installing Insbridge

3. Click **Next** to continue.

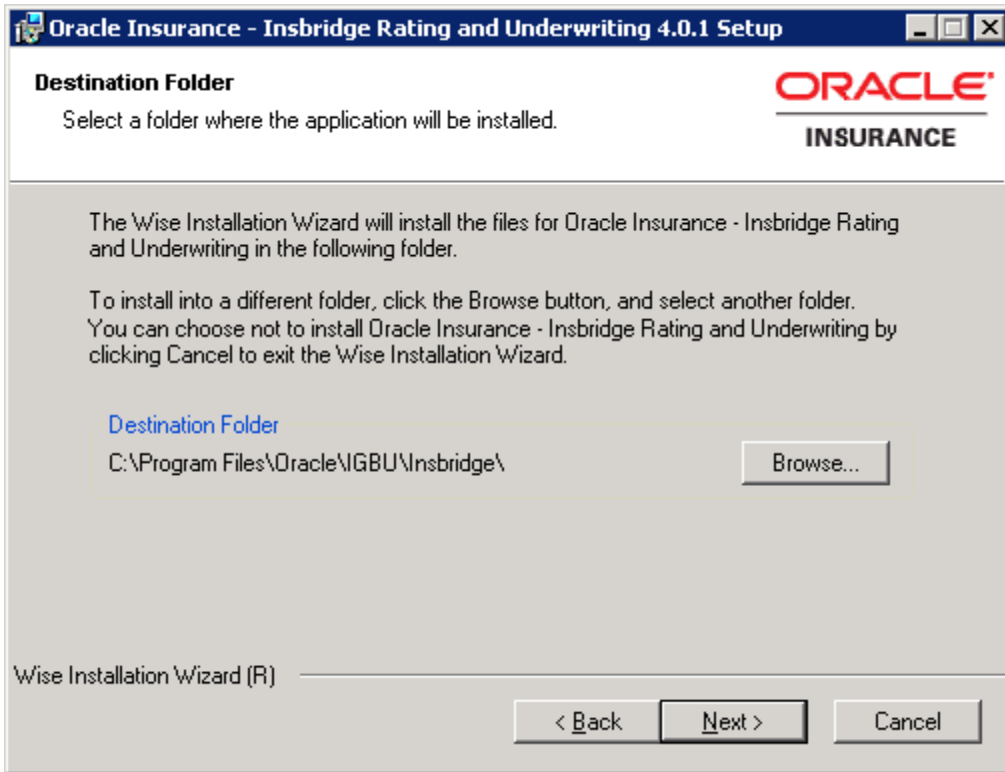


Figure 4 Entering the Destination Folder for Insbridge

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



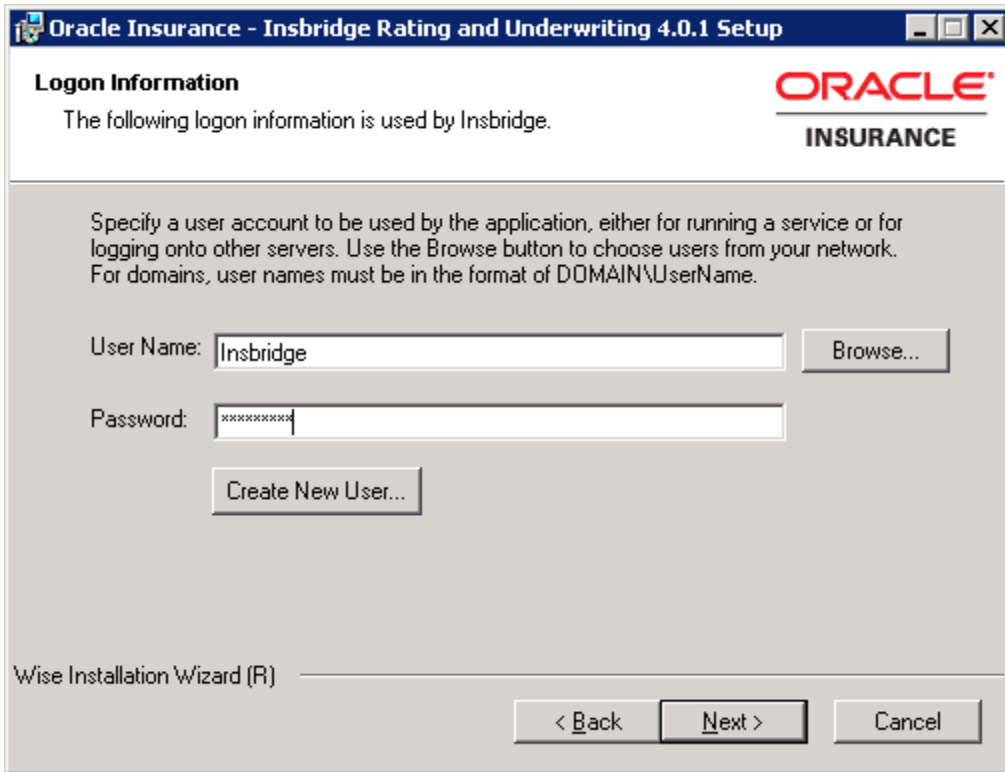


Figure 5 Logon Information

5. Enter the **Insbridge user name and password** for the local user account you set up earlier. The logon information screen will be displayed. You must specify a user account to be used by the application. Please use the Insbridge user account that you set up on page 20.

---

**NOTE:** *You can Create a New user at this point, if needed. Click the Create New User button to be placed on New User screen to setup an Insbridge user.*

---

6. Click **Next** to continue.

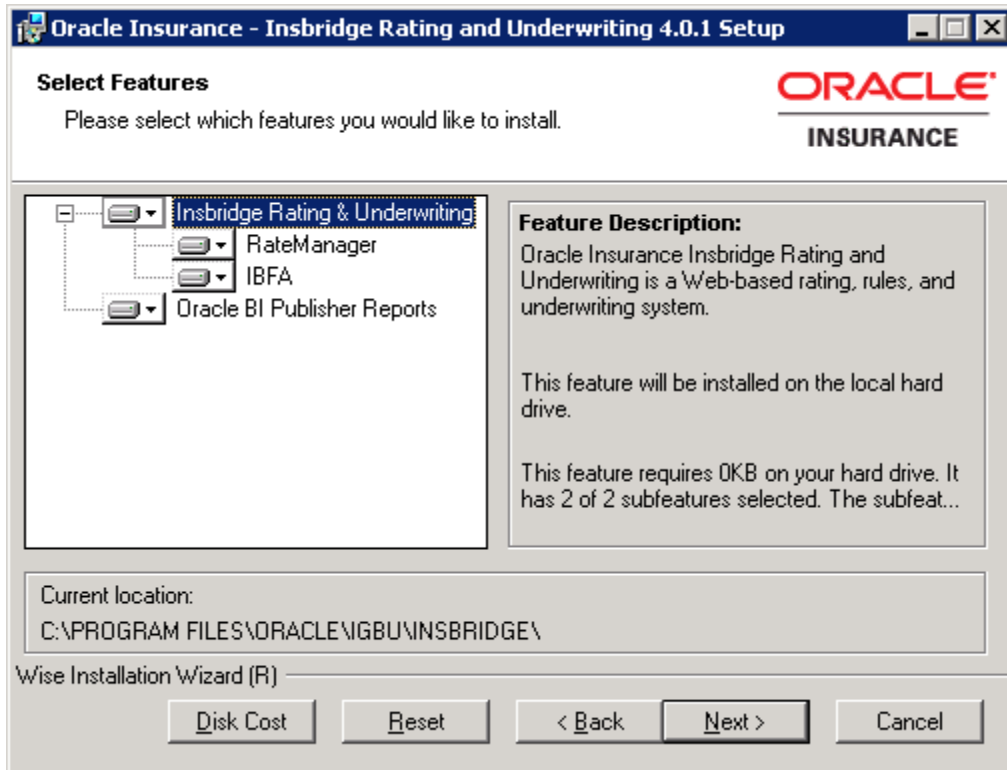


Figure 6 Selecting Features for Installation

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

Options are:

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

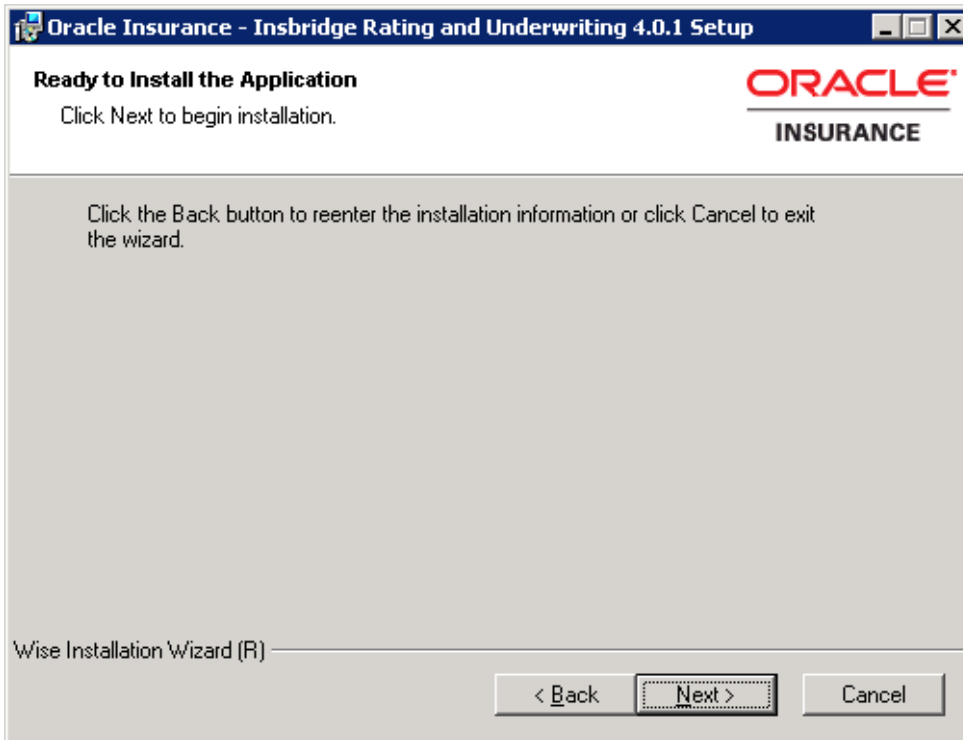


Figure 7 Ready to Install

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

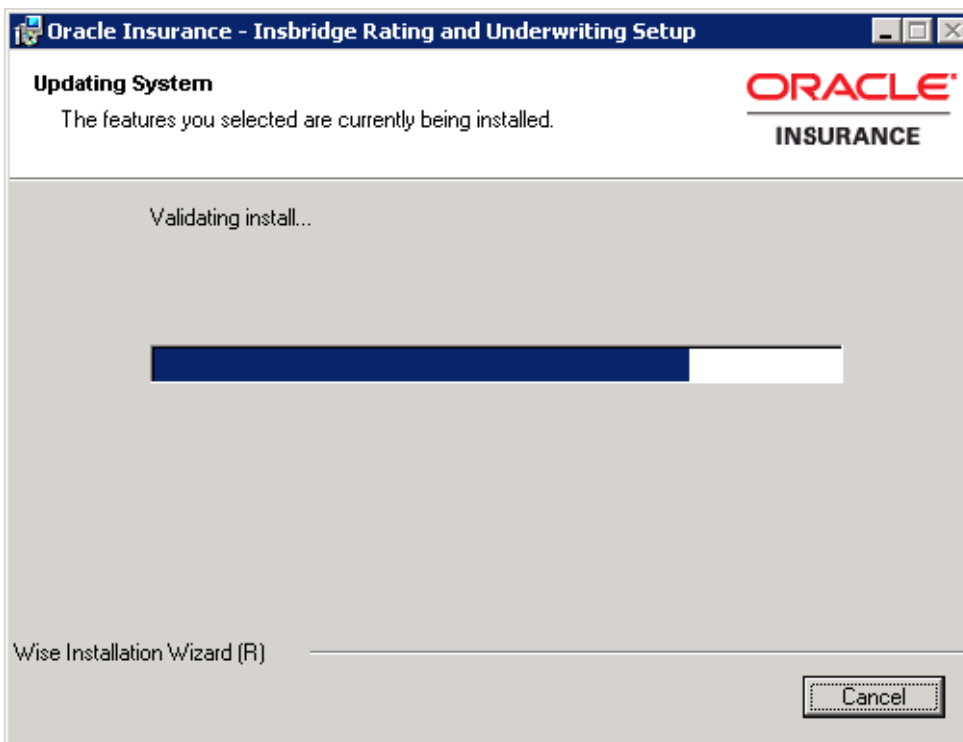


Figure 8 Installation Progress

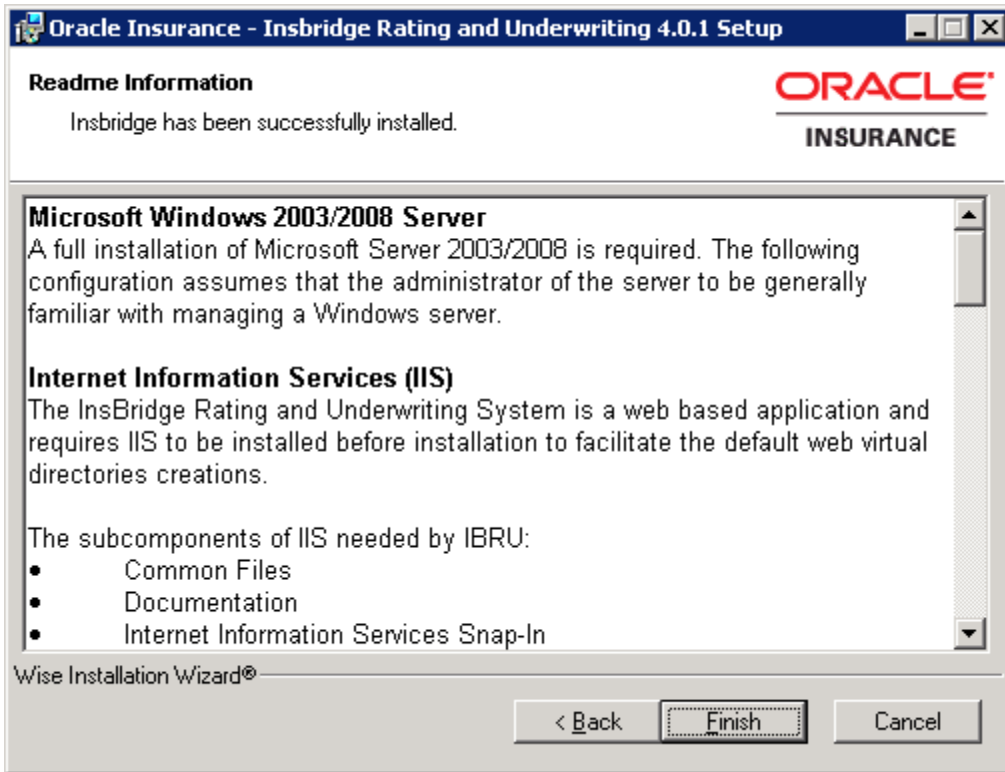


Figure 9 Install ReadMe Screen

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

## STEP 2 – CONFIGURING REGISTRY ACCESS

**NOTE:** *If you use Registry Editor incorrectly, you may cause serious problems to the operating system. These problems may require you to reinstall your operating system. Insbridge cannot guarantee that you can solve problems that result from using Registry Editor incorrectly.*

By default, only administrative and power user accounts have full permissions over this key. The insbridge user must also be given **full control** over the following registry key:

HKEY\_LOCAL\_MACHINE/SOFTWARE/Insbridge

### Assigning Permissions for the Registry Access

1. Selecting Run from the Start Menu.
2. Type **regedit32**. Click **OK**. The Registry Editor will open.
3. Browse to HKEY\_LOCAL\_MACHINE. Select SOFTWARE→Insbridge.

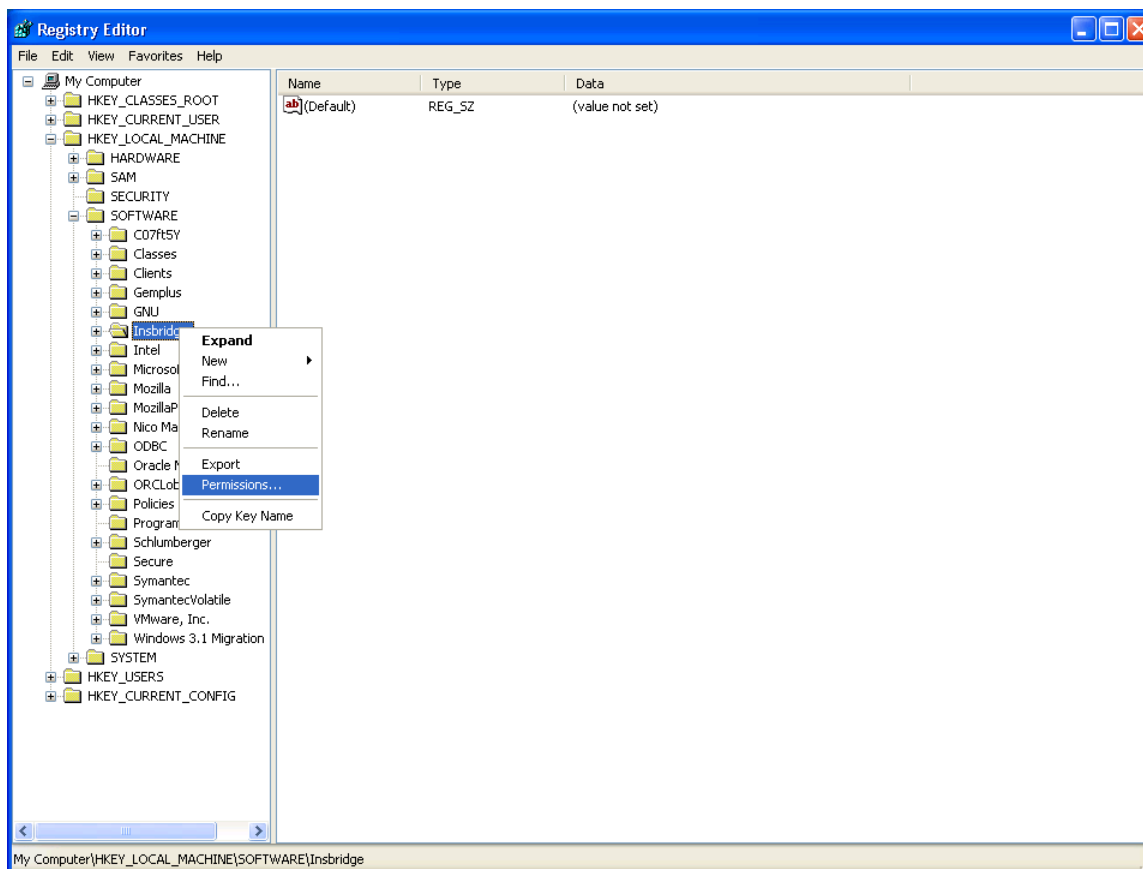


Figure 10 Configure Registry Access Windows Server

4. Right click and select **Permissions**.
5. Click **Add**.
6. On the Select Users or Groups popup, you can leave the defaults for the **Object Types** and **Locations** or enter the values you require.

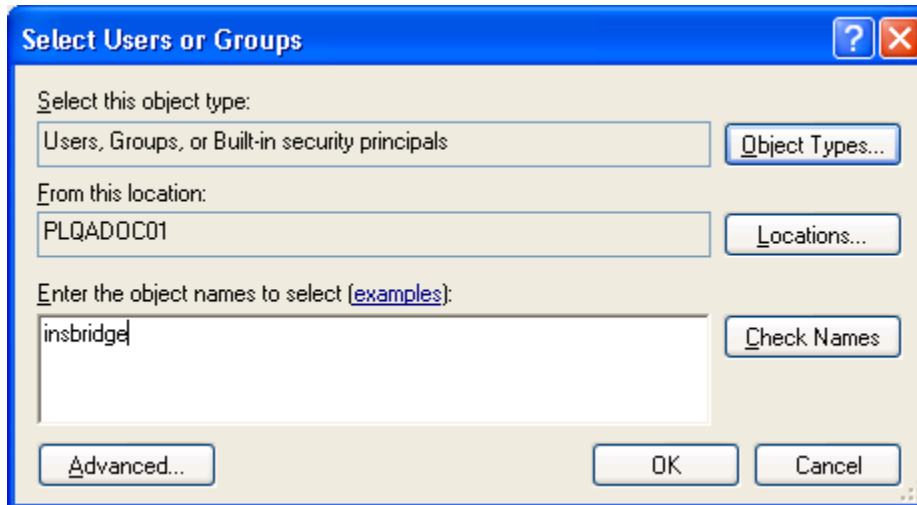


Figure 11 Entering the User

7. Enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, an error screen will be displayed. Cancel out and to return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
8. Once the name is listed, click **OK**.

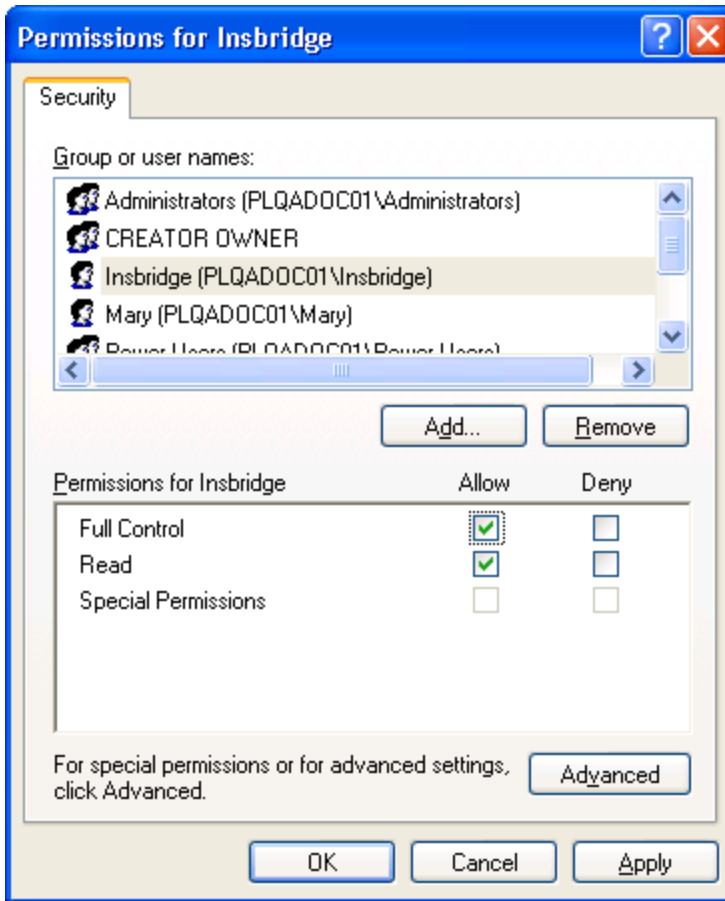


Figure 12 Applying Permissions for 2003 User

9. On the Permissions screen, make sure the insbridge user is highlighted and check to give **Full Control** to the entire Insbridge key.
10. Click **OK**.

## Export Insbridge Registry Key for Backup

The Insbridge registry key located in HKEY\_LOCAL\_MACHINE→SOFTWARE→Insbridge is used to store all information for proper encryption of the SoftRater Packages (SRPs). This registry key should be exported to a text file and stored in a safe location off the server. In the event of a catastrophic server failure and the IBRU system needs to be reinstalled, you will need, and/or be requested to send to Insbridge, your registry key.

1. Select the Insbridge key: HKEY\_LOCAL\_MACHINE→SOFTWARE→Insbridge.
2. Right click and select **Export**.
3. Select a storage location for the file and **Save**.
4. Close out of Registry Editor.

## STEP 3 – ASSIGNING PERMISSIONS – TEMP FOLDER FOR MSMQ

Assigning Permissions for a Windows Temp Folder for MSMQ

1. Open Windows Explorer. Find the WINDOWS folder, most likely on your C drive.
2. Right click the **Windows**→**Temp** folder.

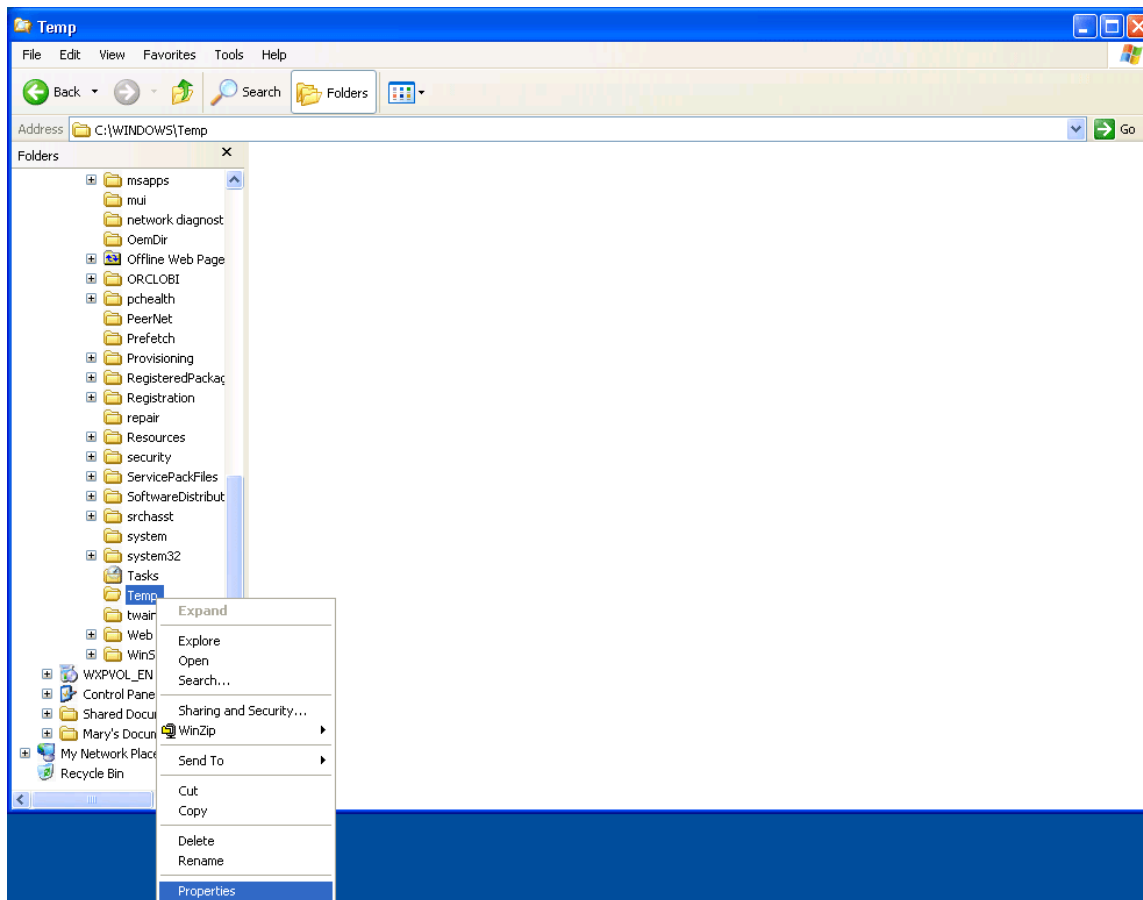


Figure 13 Assigning Permissions for the Insbridge User on Windows Temp

3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users or Groups popup, enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, an error screen will be displayed. Cancel out and return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
7. Once the name is listed, click **OK**.
8. On the Temp Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.
9. Click **OK**.



## STEP 4 – ASSIGNING PERMISSIONS – INSBRIDGE FOLDER

### Assigning Permissions for an Insbridge Folder Location

1. Open Windows Explorer. Locate the INSBRIDGE folder, most often the Insbridge folder is located at: C:\Program Files\Oracle\IGBU\Insbridge.
2. Right click the **Insbridge** folder.

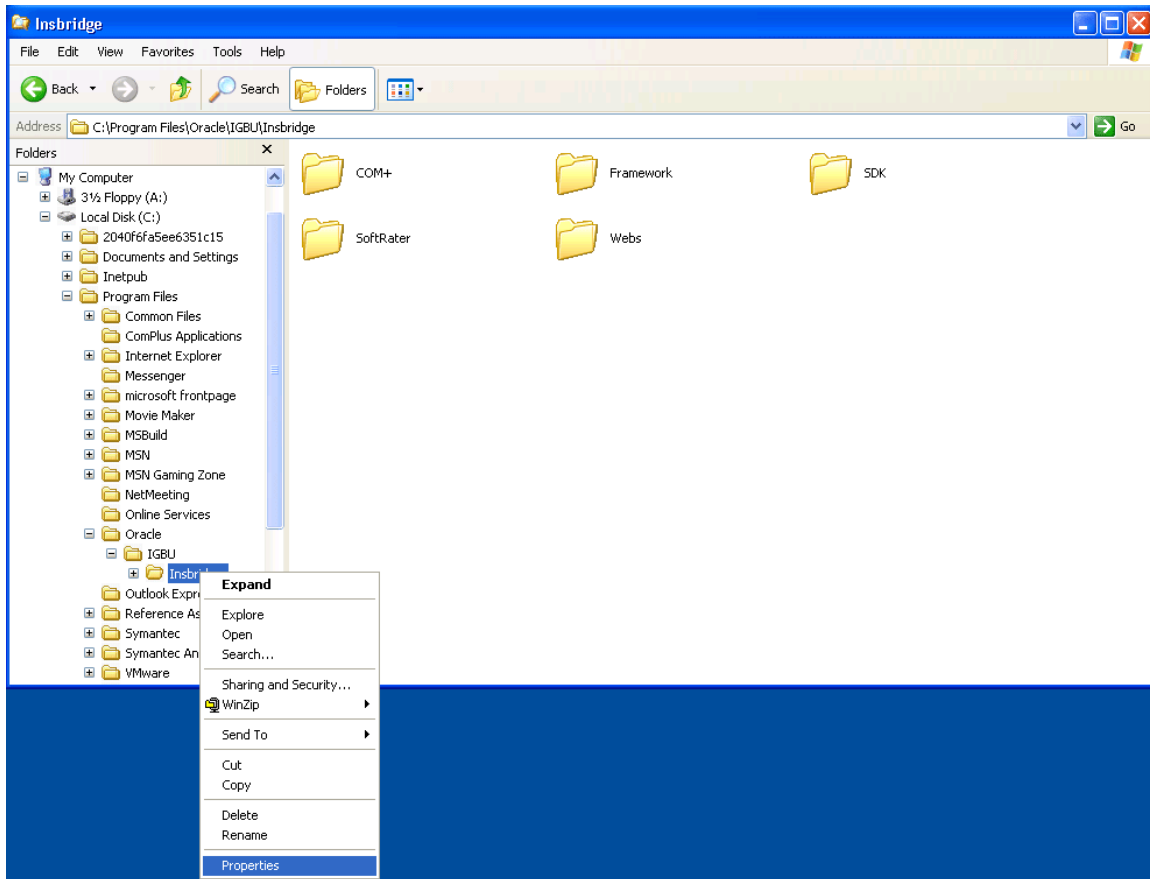


Figure 14 Assigning Permissions for the Insbridge User on Insbridge

3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users or Groups popup, enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, an error screen will be displayed. Cancel out and return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
7. Once the name is listed, click **OK**.

- On the Insbridge Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.

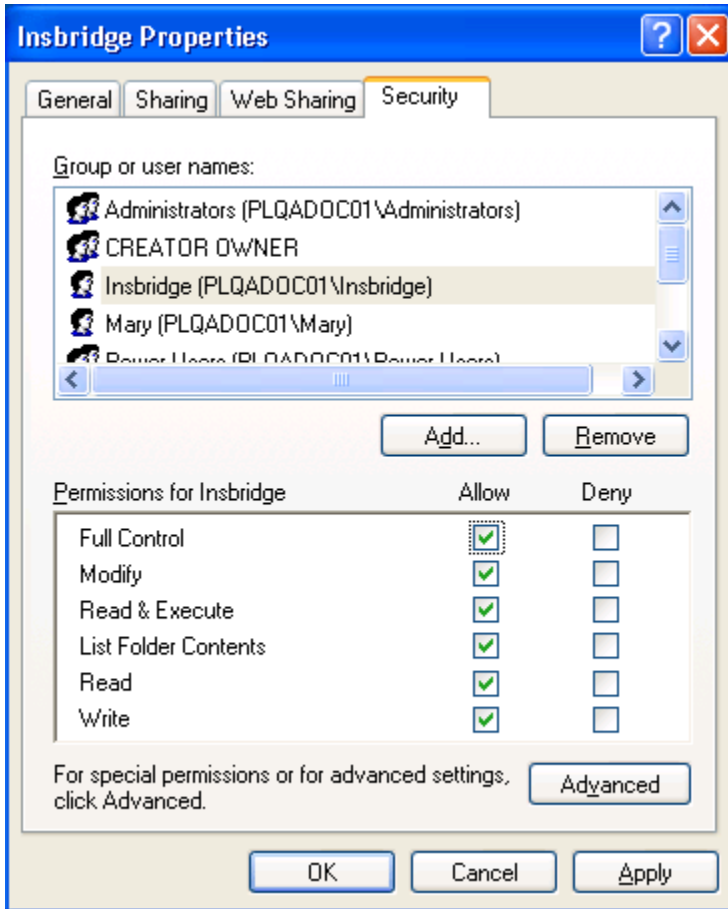


Figure 15 Setting Permission for Insbridge Folder

- Click **OK**. You can close out Windows Explorer.

## STEP 5 – RESTORING IBRU DATABASES IN SQL SERVER

Because many corporate environments have a separation between the system administrator and the database administrator, the following process may require both administrators' access and permissions. Make sure you have a SQL Server account called **ibru**.

---

**NOTE:** *If you do not have database permissions, you will not be able to perform the following database procedures.*

---

---

**NOTE:** *If you are unsure how to perform a database restore, please consult with your database administrator.*

---

Currently supported is the default SQL Server collation using SQL\_Latin1\_General\_CP1\_CI\_AS and sort order plus case sensitivity using Latin1\_General\_BIN as the server collation. The security database (IB\_CLIENT) supports the default SQL Server collation using SQL\_Latin1\_General\_CP1\_CI\_AS. The RateManager and SoftRater databases can use either case sensitive or non-case sensitive. Please check with Oracle Insurance for any questions regarding database server sort orders or collations.

1. Located in the Insbridge Installation Directory:

SQL Server

- RateManager – IBRM
    - o Latin1\_General\_BIN
      - DATABASE\_BACKUP\_IBRM\_TEMPLATE\_CASE\_SENSITIVE.bak
    - o SQL\_Latin1\_General\_CP1\_CI\_AS
      - DATABASE\_BACKUP\_IBRM\_TEMPLATE.bak
  - Security – IB\_CLIENT
    - o SQL\_Latin1\_General\_CP1\_CI\_AS
      - DATABASE\_BACKUP\_IB\_CLIENT\_TEMPLATE.bak
2. Select the RateManager backup file you want to use, case sensitive or non-case sensitive. The Security – IB\_CLIENT file is only non-case sensitive.
  3. **Copy both files** to an appropriate database folder on the machine where SQL Server is installed. For example, [Drive]:\Program Files\Insbridge\Databases. If you are unsure of a location, please consult with your database administrator.
  4. **Rename files.** It is not required but it is strongly suggested that the database file names be changed from TEMPLATE to something that defines the databases more accurately. At a minimum, it is recommended that you remove “\_TEMPLATE” from the name. You can change the names after they have been restored also.
  5. **Open the SQL Server Management Studio** either on the server or remotely using either an administrative account with sa privileges or as the sa account.

---

**NOTE:** *If you do not have SQL Server Management Studio, check to see that the SQL Server Client has been installed. For a SQL Server install, you must have the SQL Server Client installed.*

---

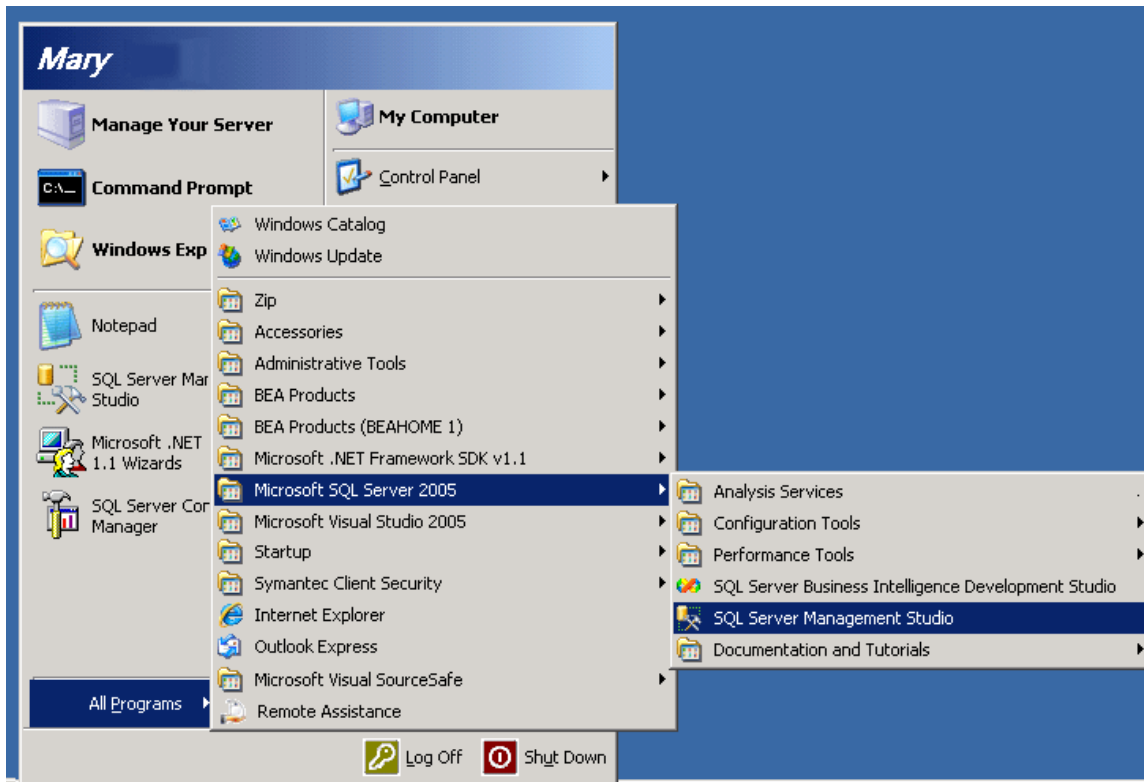


Figure 16 Restoring a Database to SQL Server

6. Go to **Databases**.

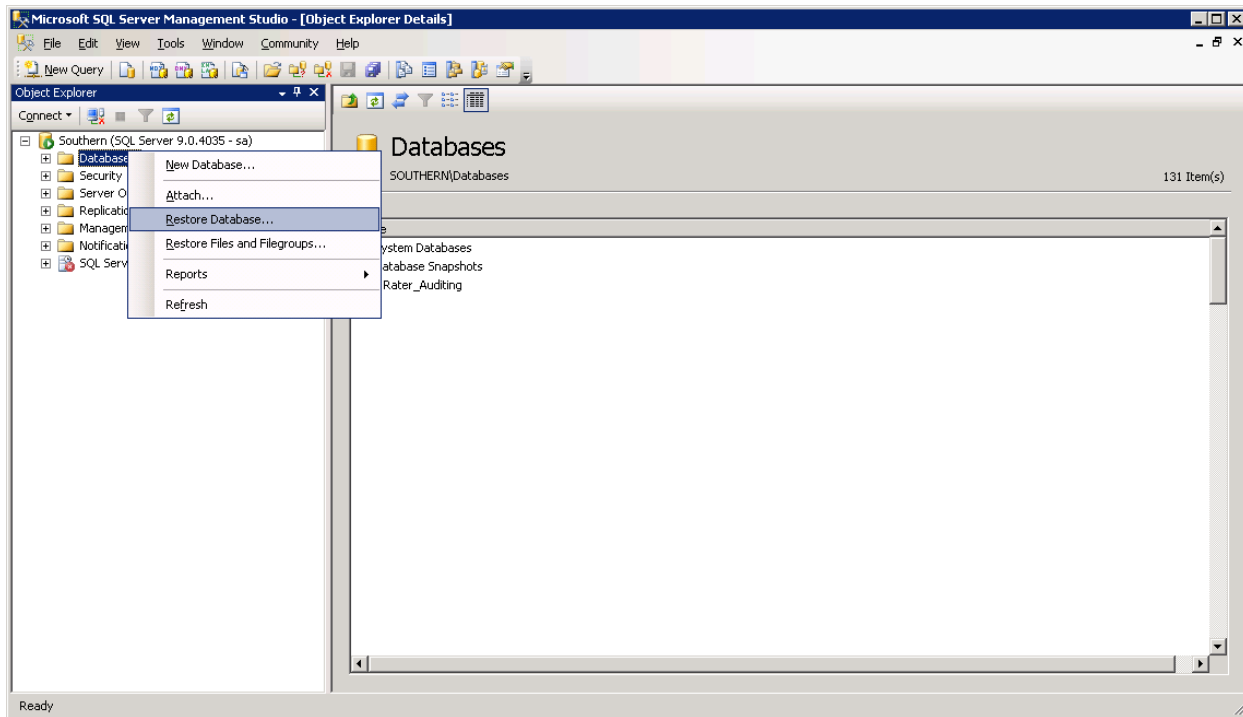


Figure 17 Right Click to Restore Database

7. Right click on **Databases**.
8. Select **Restore Database...** A separate screen will be displayed.

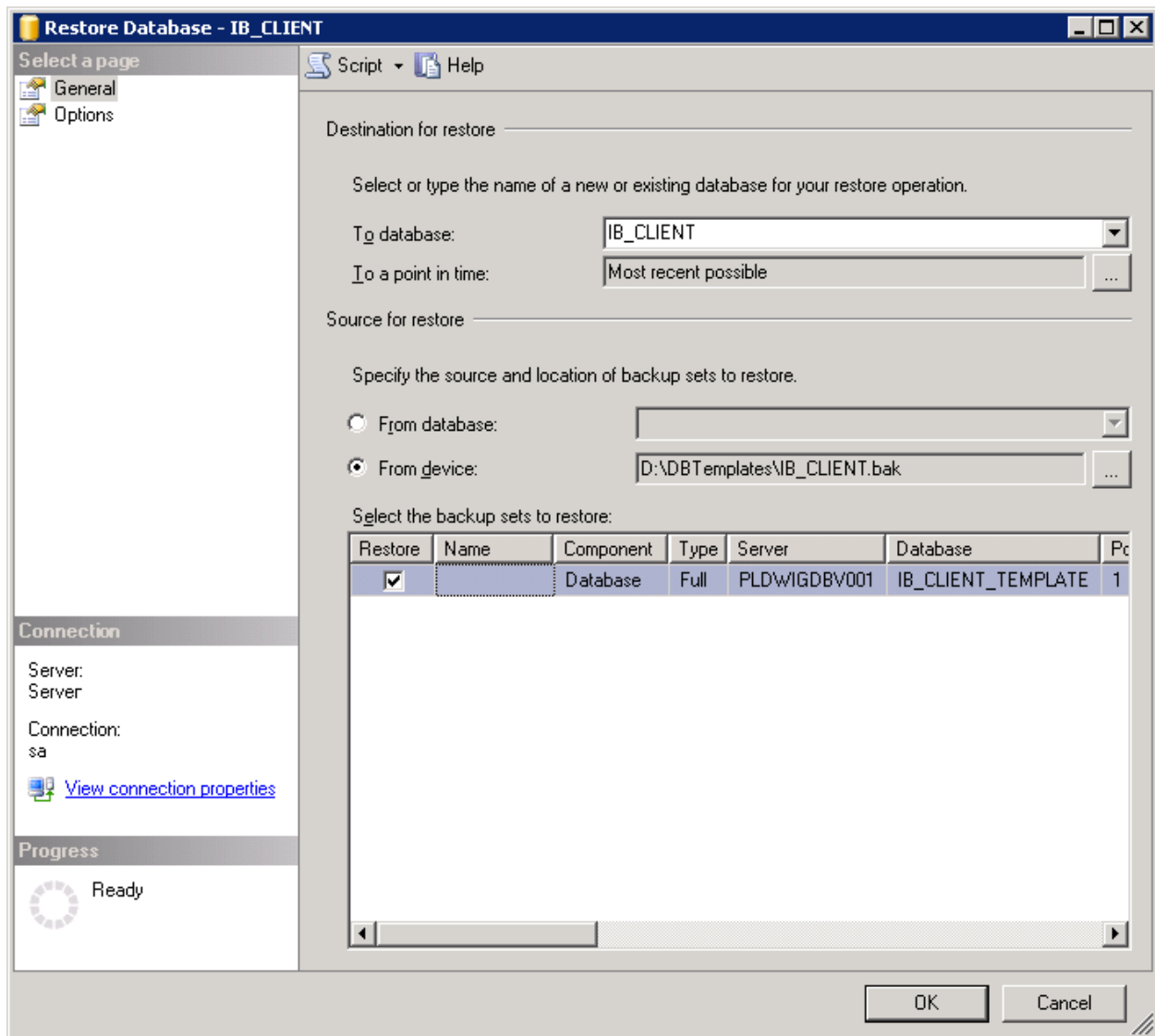


Figure 18 Restoring a Database

9. Enter your **IB\_CLIENT** database name in **To Database:**.
10. Select **From Device**. Click ... to browse to the location where the database files were placed in step 2.
11. Select your database **IB\_CLIENT\_ xxxx.BAK**, where **xxxx** equals the renamed file from step 3.
12. Click **OK**. Your database will be populated.
13. Verify your information. Check the **Restore** box.

14. Click **OK**.
15. If the database was restored successfully, it will be displayed in the database folder. If not, please correct any errors and try again.
16. Repeat for the RateManager database and any SoftRater database.
17. Once the databases are restored to SQL Server, you will need to create or assign a SQL Server user account for the application. This user will be used for the connection to the databases when setting up the connections from the Insbridge Framework Administrator. Make note of the account you want to use. This information will be entered into the Insbridge Framework Administrator.

If backups are to be allowed from the RateManager application (see page 34 for more details), then the ibru SQL server user account must have the **Disk Administrators SQL Server role**.

For ease of administration, the database user should have **db\_owner** permissions on the IBRM\_XXXX, and IB\_CLIENT databases.

## STEP 6 – CONFIGURING INSBRIDGE FRAMEWORK ADMINISTRATOR

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

http://SERVERNAME/ibfa/

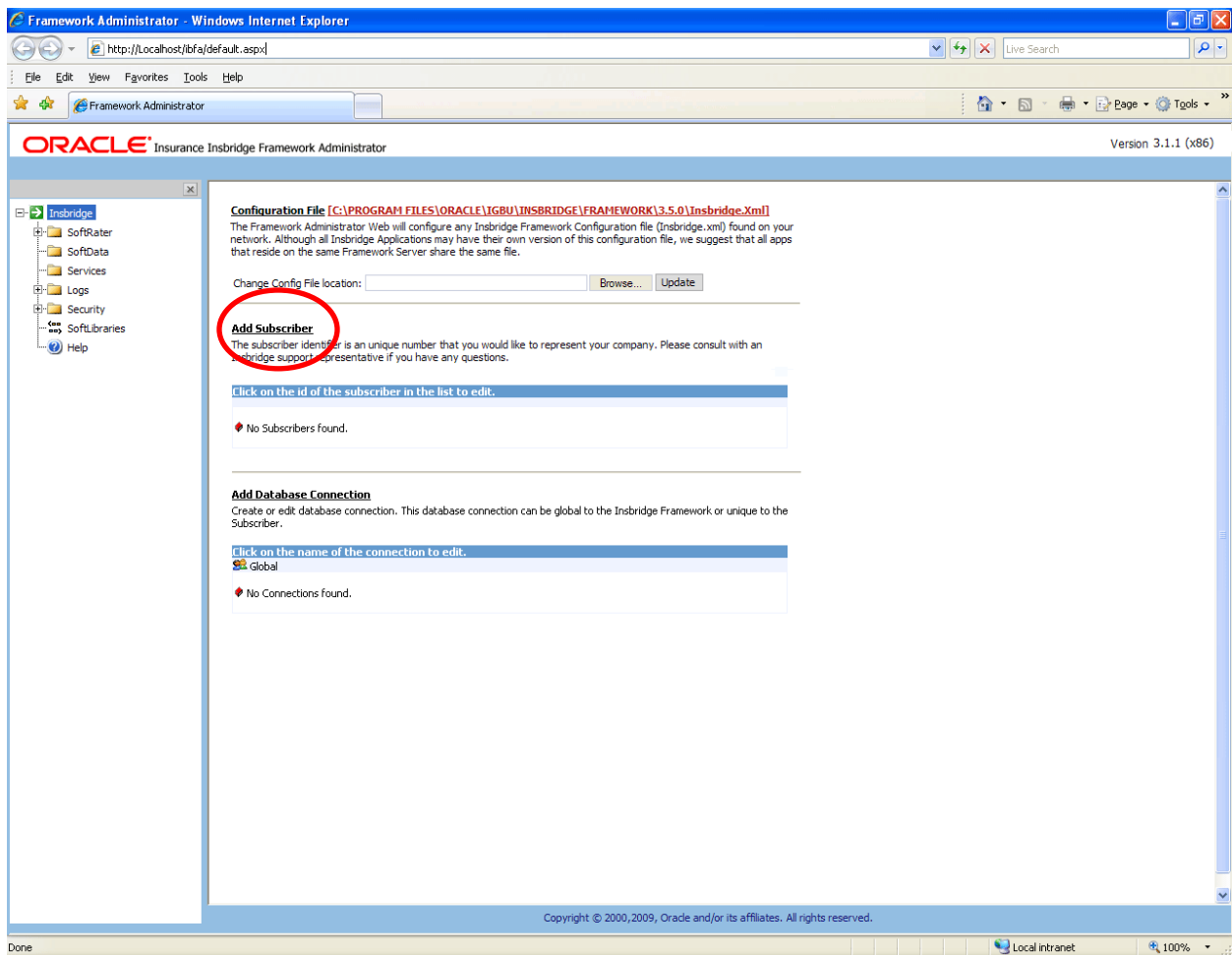


Figure 19 IBFA Home

---

**NOTE:** If you receive an access denied error message, please verify that you have given the Insubridge user full control of the Insubridge folder.

---

---

**NOTE:** If you receive an IDNX denied error message, please verify that the Insubridge user has full control over the Insubridge directory. Regedt->Insubridge Directory-> Security.

---

1. Click on **Add Subscriber** and in the next dialog.

The Type, ID and Name information for the new subscriber is chosen by you. The Type, ID and Name are fixed after the first time you save. These entries cannot be edited. Only the description can be edited.

---

**NOTE:** Make note of the subscriber ID number. You may need to enter this on another IBFA or IBSS environment.

---

The Subscriber ID can be a 3 or 4 digit number and must be unique for each subscriber per instance of IBFA. For example, if you have an instance of IBFA on machine A, you can create a subscriber with an ID of 100. On machine A, if you create another subscriber, you must give that subscriber a different ID number, say 200. If you also have an instance of IBFA on a different machine, B for example, you should not duplicate the same subscribers with the same ID numbers on machine B.

If you require assistance or are unsure of what action to take, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.

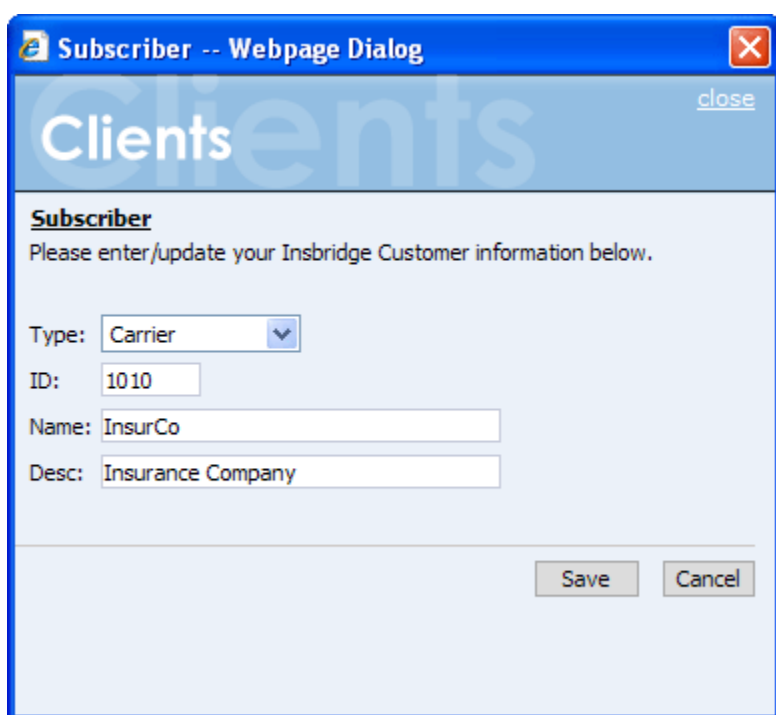


Figure 20 Enter ID

If you receive an error message or have difficulty creating a subscriber, you may need to add the Insbridge user to the Windows Machine Keys.

1. Go to C:\Documents and Settings\All Users\Application Data\Microsoft\Crypto\RSA\MachineKeys.
2. Right click and select Security.
3. Add the Insbridge user.

Next select the **Add Database Connection** link. The three databases must be added to IBFA:

- Subscriber: **Global** with Name: **controller**
- Subscriber: (**Your Subscriber Name**) with Name: **security**



- Subscriber: (**Your Subscriber Name**) with Name: **RM**

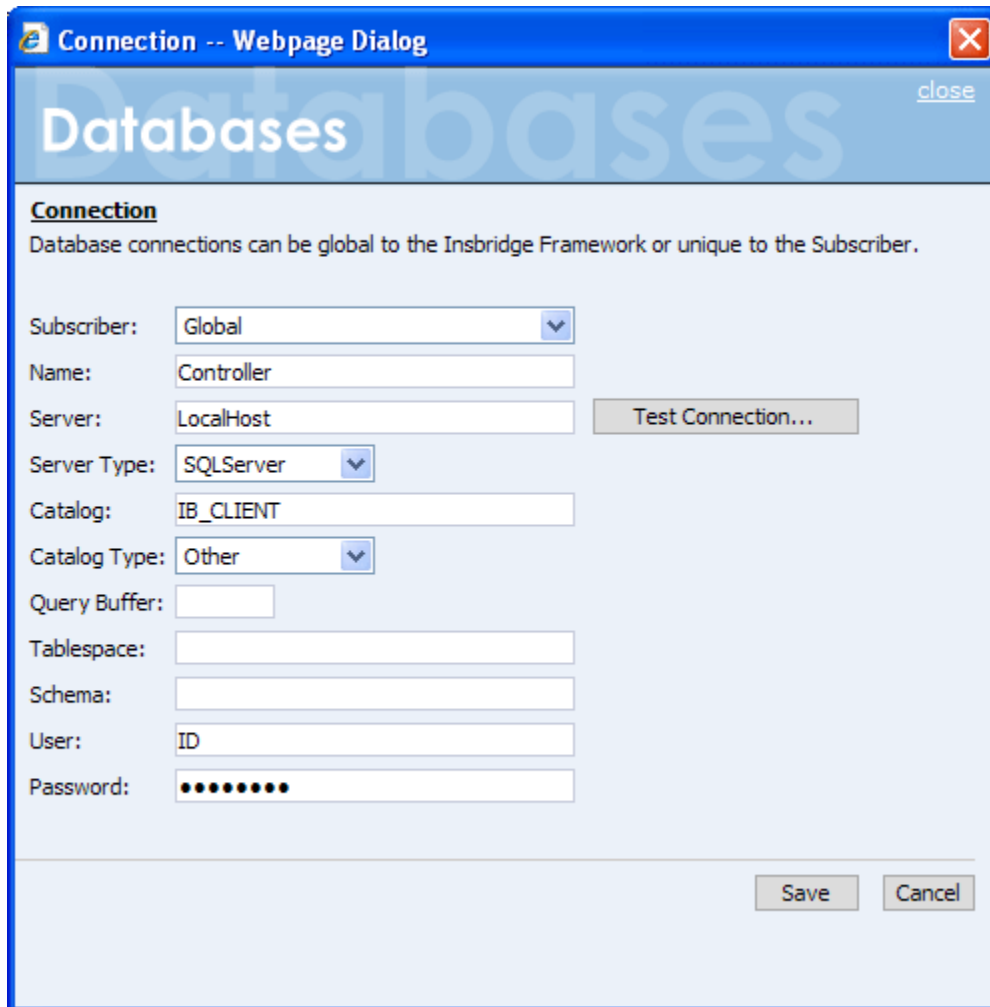
The setups are similar for all three databases. The description information following the first example will be the same for the other two databases.

In the next popup dialog, fill out connection information for the IB\_CLIENT database using the Global subscriber.

---

**NOTE:** *If you have renamed the databases, please make note of the new names.*

---



The screenshot shows a web-based dialog box titled "Connection -- Webpage Dialog" with a "close" button in the top right corner. The main heading is "Databases". Under the "Connection" section, there is a note: "Database connections can be global to the Insbridge Framework or unique to the Subscriber." The form contains the following fields and controls:

- Subscriber: A dropdown menu set to "Global".
- Name: A text input field containing "Controller".
- Server: A text input field containing "LocalHost". To its right is a "Test Connection..." button.
- Server Type: A dropdown menu set to "SQLServer".
- Catalog: A text input field containing "IB\_CLIENT".
- Catalog Type: A dropdown menu set to "Other".
- Query Buffer: An empty text input field.
- Tablespace: An empty text input field.
- Schema: An empty text input field.
- User: A text input field containing "ID".
- Password: A text input field with ten black dots representing masked characters.

At the bottom right of the dialog are "Save" and "Cancel" buttons.

Figure 21 Setting up the Global Database Connection

**Select Global for the Subscriber.** The IB\_CLIENT database is a global database and is not unique to the subscriber. This information cannot be changed once you have saved it.

The Database **Name** cannot be changed once you have saved it.

The **Server** is the database server name or IP address which ever is resolvable by the IBRU web server. You also can test the connection and make sure it is valid at the time of entry.

The **DB Server Type** is the type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2.

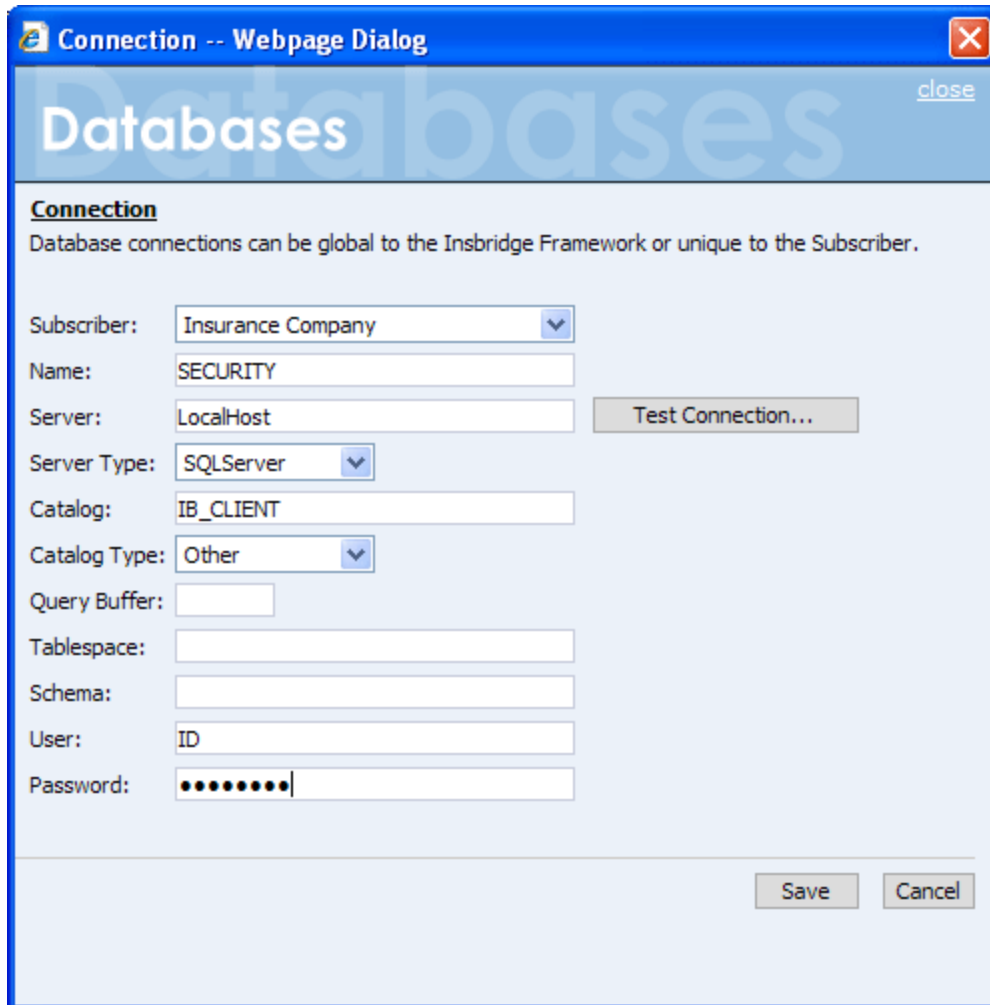
The **Catalog** is the name of the catalog in the database. For DB2 servers, this is the System DSN Name.

The **Catalog Type** is the type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.

Tablespace and Schema are not required for this connection. The User is the SQL Server user (ibru) assigned as database owner on page 20 if needed.

Add the next database. Select the **Add Database Connection** link again.

In the next popup dialog, fill out connection information for the IB\_CLIENT database using your subscriber ID. Name this one security.



The screenshot shows a web-based dialog box titled "Connection -- Webpage Dialog" with a "close" button in the top right corner. The main heading is "Databases". Below this, there is a section titled "Connection" with a note: "Database connections can be global to the Insbridge Framework or unique to the Subscriber." The form contains the following fields and controls:

- Subscriber: A dropdown menu with "Insurance Company" selected.
- Name: A text input field containing "SECURITY".
- Server: A text input field containing "LocalHost". To its right is a "Test Connection..." button.
- Server Type: A dropdown menu with "SQLServer" selected.
- Catalog: A text input field containing "IB\_CLIENT".
- Catalog Type: A dropdown menu with "Other" selected.
- Query Buffer: An empty text input field.
- Tablespace: An empty text input field.
- Schema: An empty text input field.
- User: A text input field containing "ID".
- Password: A text input field with 10 dots representing masked characters.

At the bottom right of the dialog, there are "Save" and "Cancel" buttons.

Figure 22 Setting up the Security Database Connection

Create a connection for RateManager using your subscriber id. Name this one rm.

---

**NOTE:** The **Catalog Type** must be set to **RateManager** when you are creating the Connection from RateManager. If you leave it set to Other, you will receive an error.

---

The screenshot shows a web-based dialog box titled "Connection -- Webpage Dialog" with a "close" button in the top right corner. The main heading is "Databases". Below this, the section is titled "Connection" and includes the text: "Database connections can be global to the Insbridge Framework or unique to the Subscriber." The form contains the following fields and controls:

- Subscriber: Insurance Company (dropdown menu)
- Name: RM (text input)
- Server: LocalHost (text input) with a "Test Connection..." button to its right
- Server Type: SQLServer (dropdown menu)
- Catalog: IBRM (text input)
- Catalog Type: RateManager (dropdown menu)
- Query Buffer: (empty text input)
- Tablespace: (empty text input)
- Schema: (empty text input)
- User: ID (text input)
- Password: (password masked with dots)

At the bottom right of the dialog are "Save" and "Cancel" buttons.

Figure 23 Setting up the RateManager Database Connection

Next, create the default rating environments for the RateManager system.

It is recommended that you create two logical environments:

- RM – to handle rating and testing.
- QA – to hold the full packages that need to be consumed by the QA environment.

1. Browse to **SoftRater**→**Explorer**→**Subscriber name**.

---

**NOTE:** *This default environment is not required if performing a SoftRater node installation. Other environments will still need to be created to load SRPs to the IBSR databases.*

---

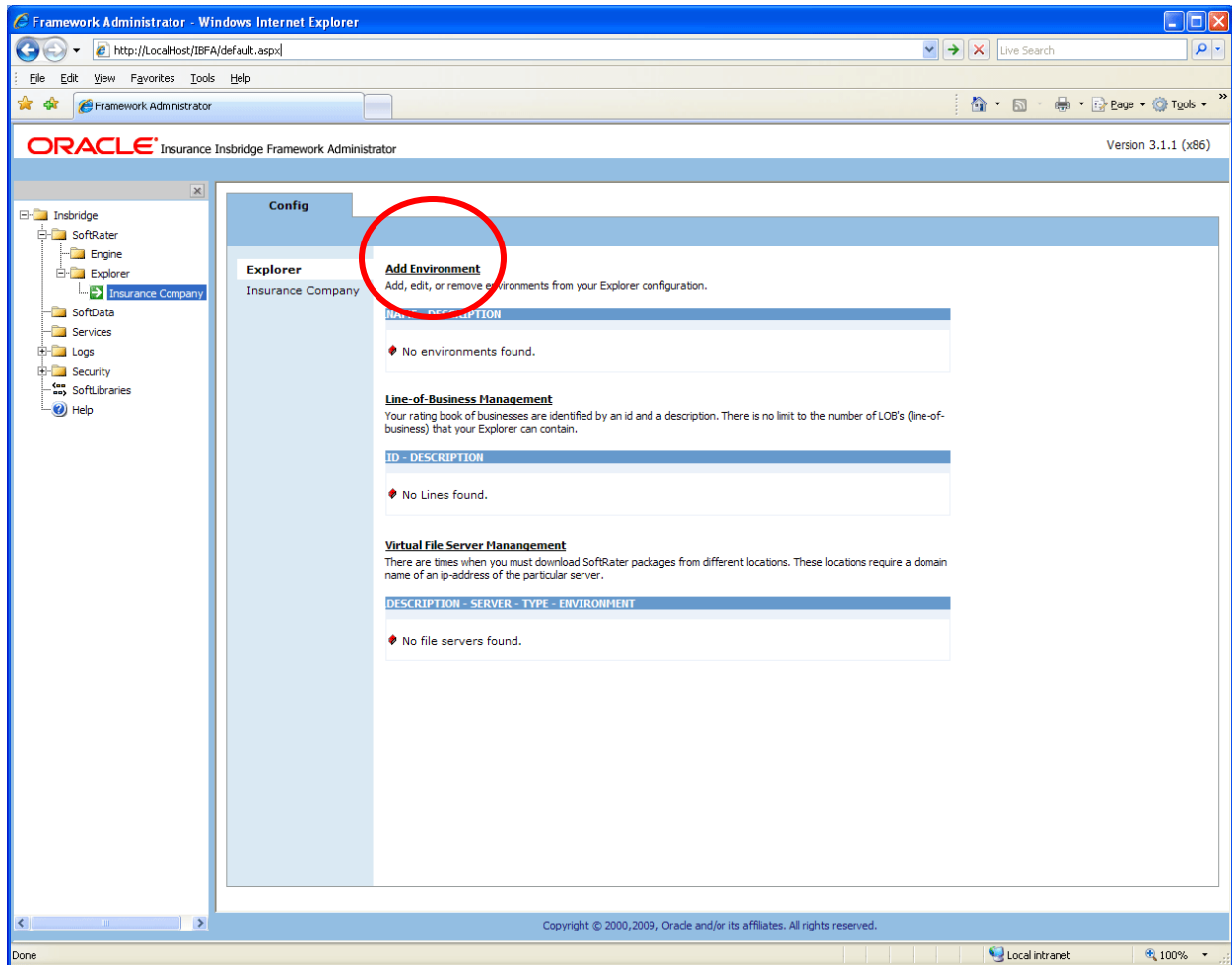


Figure 24 Create a Rating Environment

2. Click on **Add Environment**.

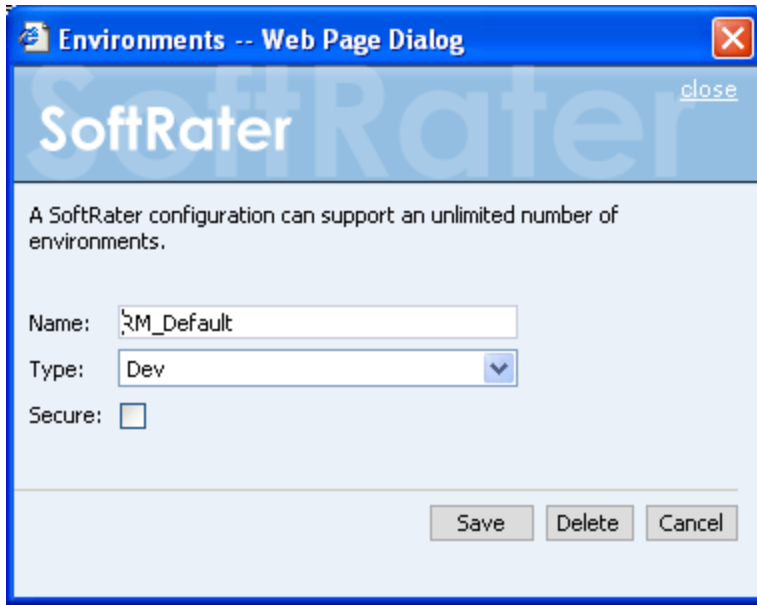


Figure 25 Entering Name and Environment

3. Enter a Name and select a Type. The name and type are totally dependent on how your IBRU system is designed.

There are three types of Logical Environments:

- **Development**
- **Quality Assurance**
- **Production**

After you have entered your logical environment, you must define it.

### Defining the Logical Environment

4. Select your company name underneath Config on the left hand side to enter the configuration information for the newly created logical environment.

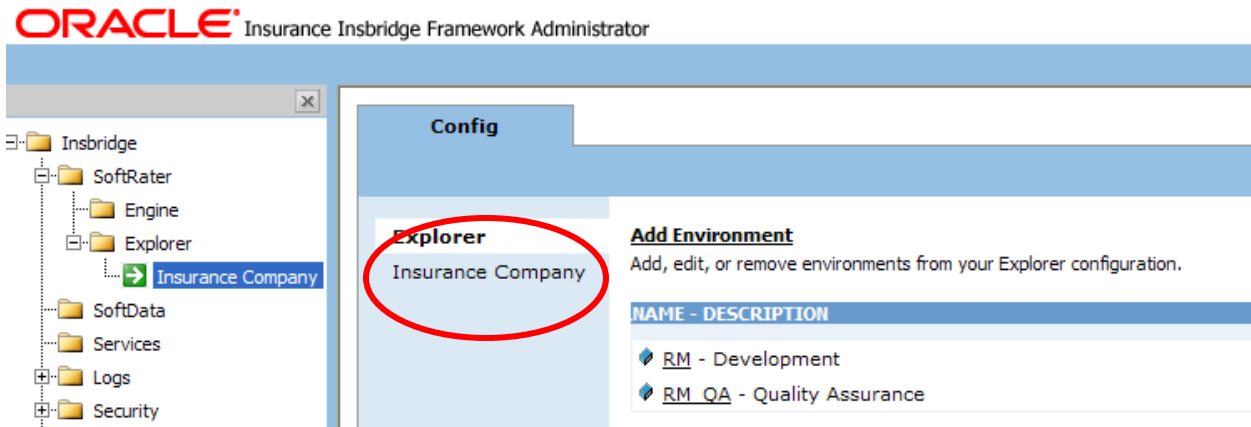


Figure 26 Obtaining Environment Information

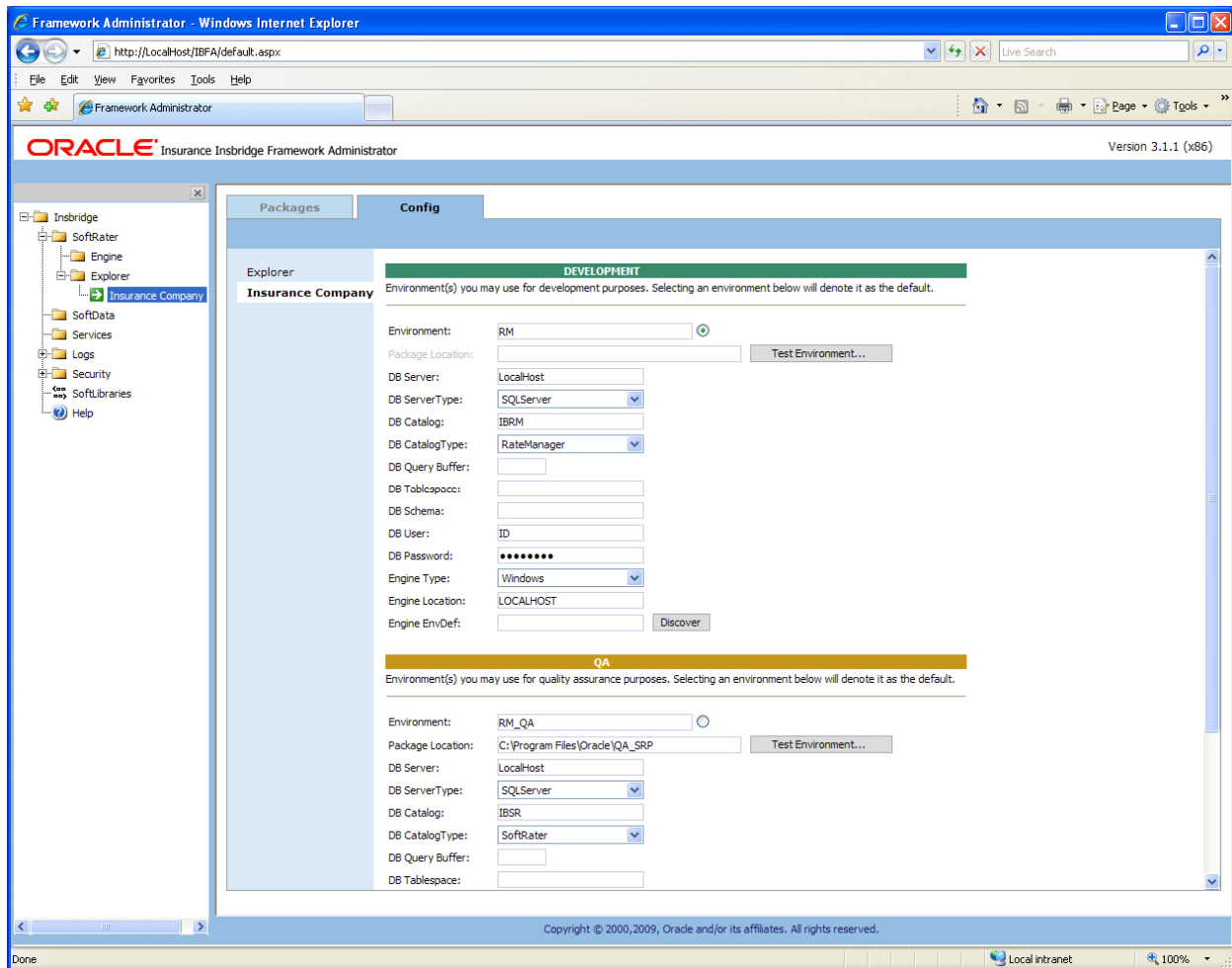


Figure 27 Editing Environment

- Only the information shown above is required for this connection; Environment, DB Server, DB Server Type, DB Catalog, DB Catalog Type, DB User, DB Password, Engine Type and Engine Location. The Package Location, DB Query Buffer, DB Tablespace, DB Schema, and Engine EnvDef can remain blank or filled out as needed. The user account should be the database owner (ibru).

For each environment, you can set up the following information:

**Environment:** The name of the environment. Selecting the radio button next to an environment's name will set it up as the default environment.

**Package Location:** Physical location of where the packages should be stored. Click **Test Environment** to run a process to validate the permissions on the directory and certify any packages in the directory. In order for the Framework Administrator to successfully manipulate packages in the location, it must have full control of the directory.

**DB Server:** The name of the server that houses the database that packages will be loaded to. For DB2 servers, this is the DB2 Registered Alias Name. For Oracle servers, this is the server name; either IP or DNS will work. The Database listener port number will also need to be appended to the server name if it is something other than the default port.

The format for this is as follows: [SERVER NAME]:[PORT NUMBER]

**DB Server Type:** The type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2.

**DB Catalog:** The name of the catalog in the database. For DB2 servers, this is the System DSN Name. For Oracle servers, this is the instance.

**DB Catalog Type:** The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.

**\*DB Query Buffer:** For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.

**\*DB Tablespace:** For future use.

**\*DB Schema:** The name of the schema that defines the structure of the database. This information may be obtained from the Oracle DBA.

**DB User:** Username to access the database. This information may be obtained from the Oracle DBA.

**DB Password:** Password to access the database. This information may be obtained from the Oracle DBA.

**Engine Type:** The type of SoftRater engine that is used. The available options are: Windows, WebSphere, WebLogic, or JBoss.

**Engine Location:** The location of the SoftRater engine. If the engine is local to the Framework Administrator (i.e. located on the same server), leave this field as LOCALHOST. If the engine is located on a different server, enter the name in the box.

**Engine EnvDef:** This field should remain blank, unless the engine is located on a different server. If the **Engine Location** is set to LOCALHOST, leave this field blank. If the **Engine Location** is not LOCALHOST, this should match the name of the environment on the remote server.

---

**NOTE:** *If you are using an Oracle or DB2 server, the options and requirement will be different. Please see the Insbridge IBFA User Manual (Located in the User Guides directory) for more information.*

---

6. After you have entered your information, scroll to the bottom of the page and click Save to save your environments.

## STEP 7 – VERIFYING THE COMPONENT SERVICES

Next, you should verify the component services.

1. Click **Start→Programs→Administrative Tools→Component Services**.
2. Expand the **Component Services** option under console Root.
3. Expand **Computers→My Computer→COM+ Applications**.
4. Expand each Insbridge **COM+ library** to make sure there are components listed underneath each compartment.

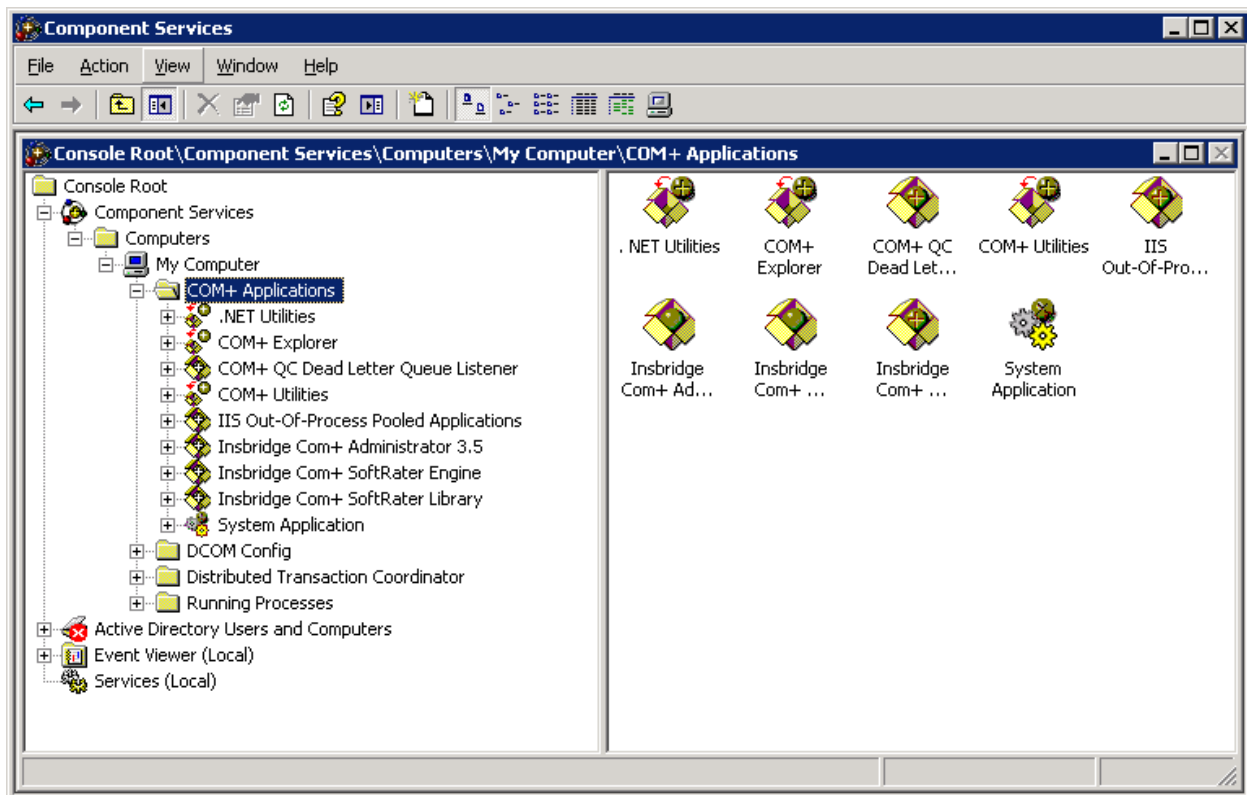


Figure 28 Component Services

There should be 3 Insbridge Com+ Applications libraries:

- Insbridge Com+ Administrator 3.5
- Insbridge Com+ SoftRater Engine
- Insbridge Com+ SoftRater Library

Please note that you will not have to make any changes to any COM+ Application library. The installation will automatically apply the Insbridge user name and password that you created earlier to the necessary libraries. If you change the password, you will have to change the password in all three of the Insbridge



Com+ libraries. On each library, right click, select Properties, select the Identity tab, enter in the new password.

---

**NOTE:** *If any COM+ library is missing, run the IBRU install again from the msi file and choose uninstall. Then rerun the IBFA install. Uncheck the RateManager Install. Then check again to see if all the libraries are listed. If they are still not listed, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.*

---

Older instances of Insbridge may also have a fourth Com+ library.

### **For Windows Server 2008**

1. Click **Start→Administrative Tools→Component Services**.
2. Expand the **Component Services** option under console Root.
3. Expand **Computers→My Computer→COM+ Applications**.
4. Expand each Insbridge **COM+ library** to make sure there are components listed underneath each compartment.

## STEP 8 – ALLOWING FOR WCF ACTIVATION

FOR WINDOWS SERVER 2008 ONLY. Windows Server 2003 can skip this step.

WCF Activation is required for web services. RateManager makes call using IBFA web services. If this is not activated, users will experience errors.

1. Select Start→Administrative Tools→Server Manager.
2. Select Features Summary. Scroll through the list to verify WCF Activation has been activated.
3. If not, select Add Features. The Add Features Wizard will be displayed.

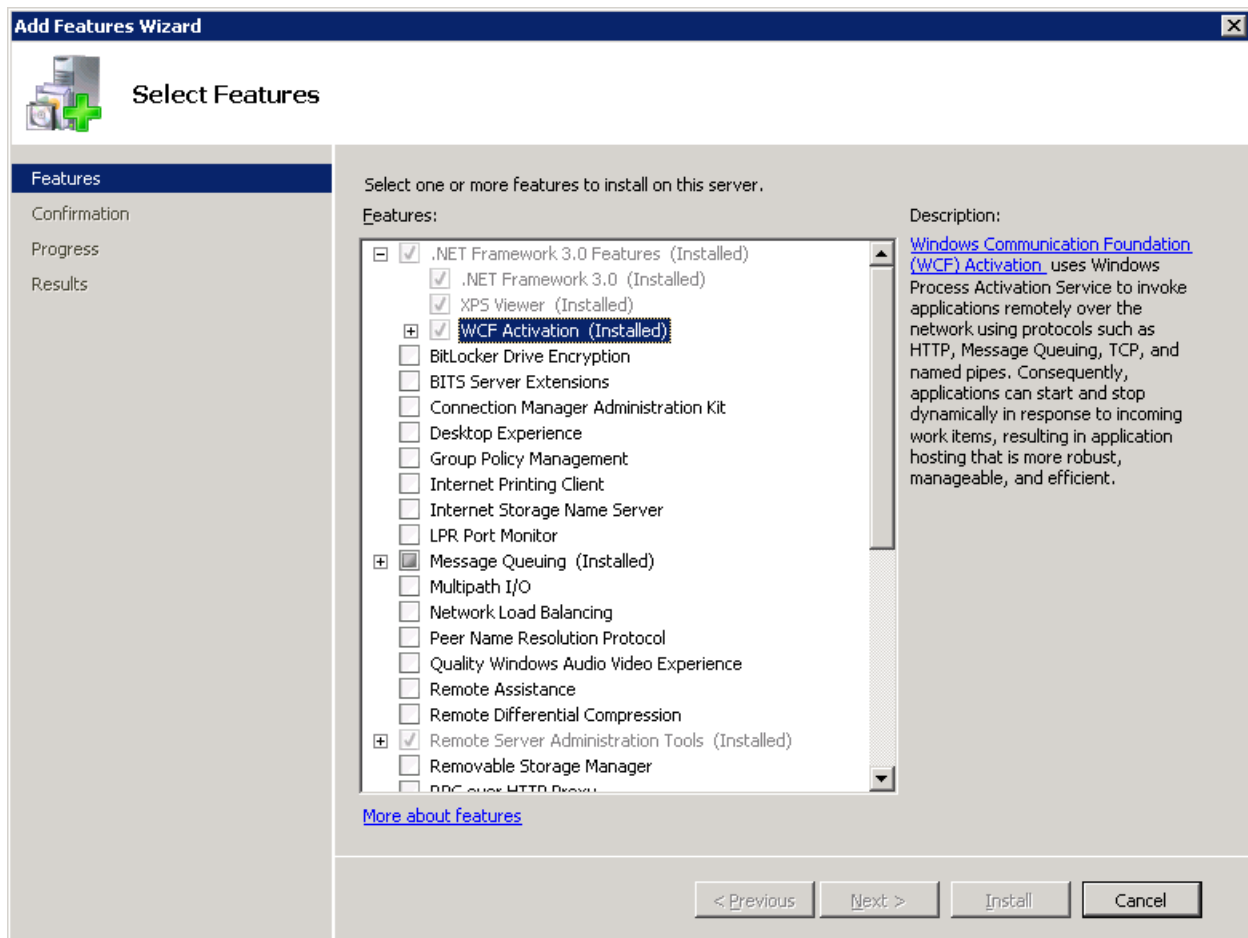


Figure 29 Selecting WCF Activation

4. Select WCF Activation. Click NEXT.
5. Confirm your selection and click INSTALL. The installation will proceed.
6. You can close out when complete.

## STEP 9 – INSTALLING THE OBI PUBLISHER

OBI Publisher is necessary for reports. If you do not plan on using reports in RateManager or IBFA, you do not need to install this program.

1. Unzip the OBI\_PUBLISHER

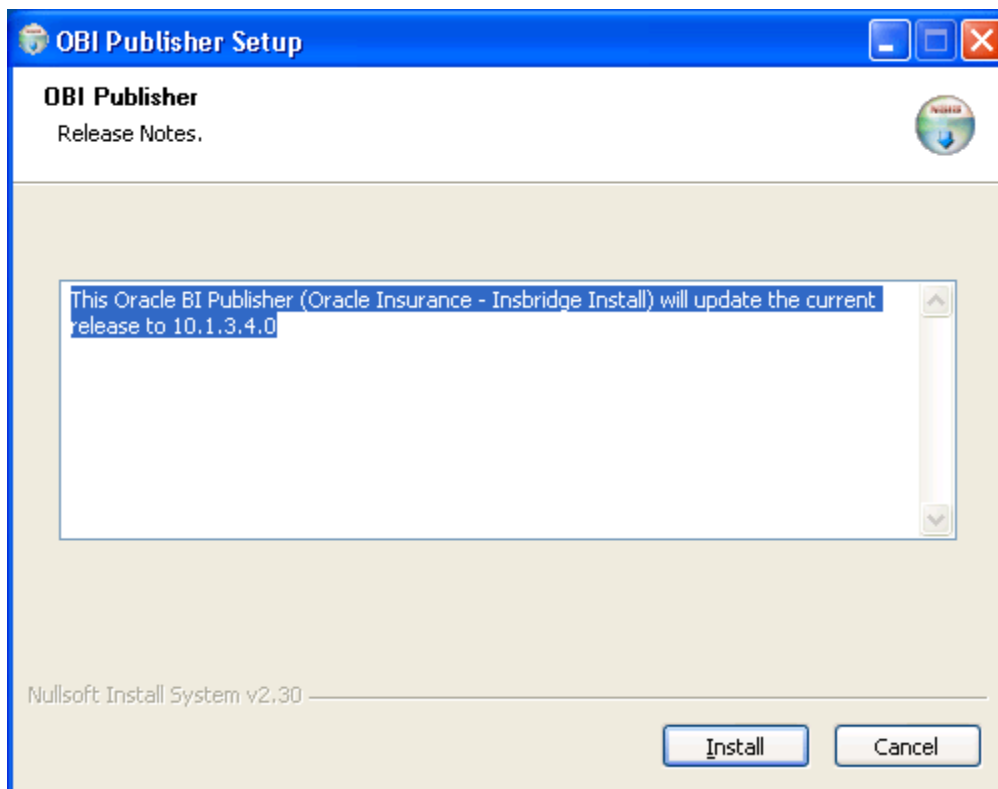


Figure 30 Installing OBI Publisher

2. Click **Install**. A progress screen will be displayed.
3. When complete, click **Close**.
4. In order for OBI Publisher to be available to users, you must start the **Insbridge Message Service**. The Insbridge Message Service can be started from IBFA or from Services in Windows 2003 or the Server Manager in Windows 2008.

It is also recommended that you start the **Insbridge Task Manager** as well. The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status.

## Starting Insbridge Services

It is also recommended that you start the **Insbridge Task Manager** as well. The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status.

### Insbridge Message Service

The Insbridge Message Service is a Message Queue Listener that will route all batched messages to an assembly (process) for execution. These processes may take resources and time to execute. Please consult with your system admin before configuring the number of listeners per process.

**Message Process**

Batch Rating

If you see this message, you have not requested a listing from the selected spoke client. Clicking View Messages will provide you with a list view of the first in - first out messages that are waiting to execute.

### Insbridge Task Manager

The Insbridge Task Manager gives you the ability to execute daily, weekly, hourly, or by the minute.

(This process may take a while to execute)

TASK	LAST RUN-DATE	START-TIME	STATUS
------	---------------	------------	--------

Figure 31 Insbridge Services Screen

1. In **IBFA**, navigate to the **Services** page.
2. Next to Insbridge Message Service, click . After a few seconds, the buttons will refresh to indicate that the service is started.
3. Next to Insbridge Task Manager, click . After a few seconds, the buttons will refresh to indicate that the service is started.

---

**NOTE:** The location and port for OBI Publisher is <http://localhost:9704/xmlpserver/>. This information may be needed if you have to make a request to your company's infrastructure and request the security team to open the ports used by Publisher.

---

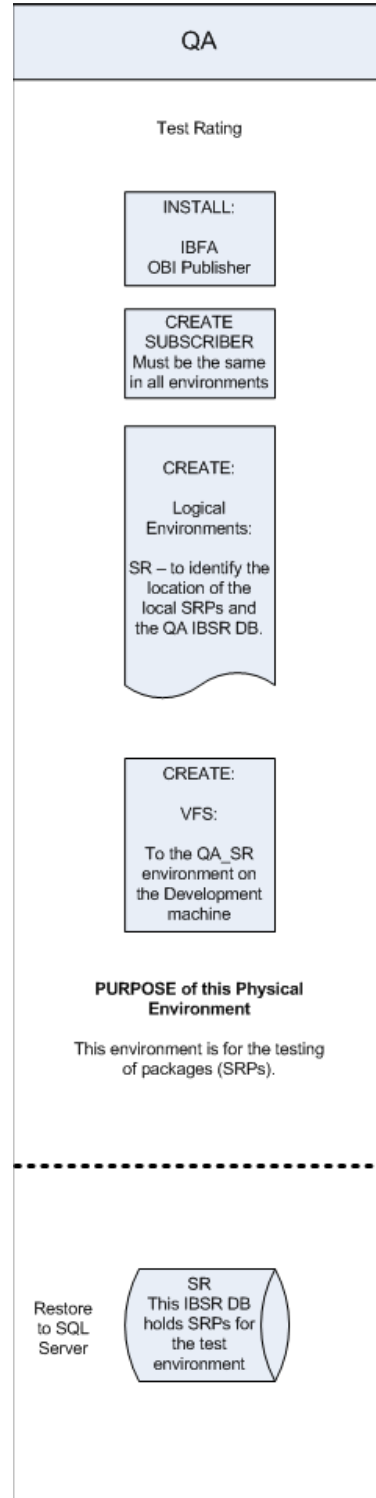
## SOFTRATER NODE INSTALLATION

Before installing, please verify that the requirements are in place.

The installation must be performed in the following order:

1. Install the IBRU application without RateManager.
2. Registry Access.
  - a. Assigning Insbridge Access.
  - b. Exporting Key for safe keeping.
3. Assigning permissions to the Insbridge User for the Windows Temp Folder. This is necessary for MSMQ
4. Assigning permissions to the Insbridge User for the Insbridge Folder
5. Creation of the QA\_SR databases is next.
6. Return to IBFA and Configure:
  - a. Create your subscriber.
  - b. Create your logical environment.
  - c. Create your Virtual File Server connection.
7. Verifying Component Services.
8. Exporting/Importing the Registry Key
9. Allowing for WCF Activation. **FOR WIN 2008 ONLY.**
10. Install OBI Publisher.

**For a Windows 2008 Server installation, you must run as Administrator.**



## SOFTRATER NODE

This type of installation is also called a SoftRater node installation. A SoftRater node is an IBFA instance on a machine that allows for packages to be copied and loaded from environment to environment. A SoftRater node installation is done on a Windows machine and can have either a SQL Server database or an Oracle or DB2 database.

This type of install is like a Full RateManager Installation with the RateManager option set to not install. Also, a Virtual File Server will be set up to allow this machine to communicate with the RateManager machine.

This installation will be the same for the Production environment with a Virtual File Server set up to allow it to communicate with the QA machine.

SoftRater Nodes can be added any time after RateManager has been installed.

## STEP 1 – INSTALL INSBRIDGE RATING AND UNDERWRITING

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

---

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

---

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

---

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

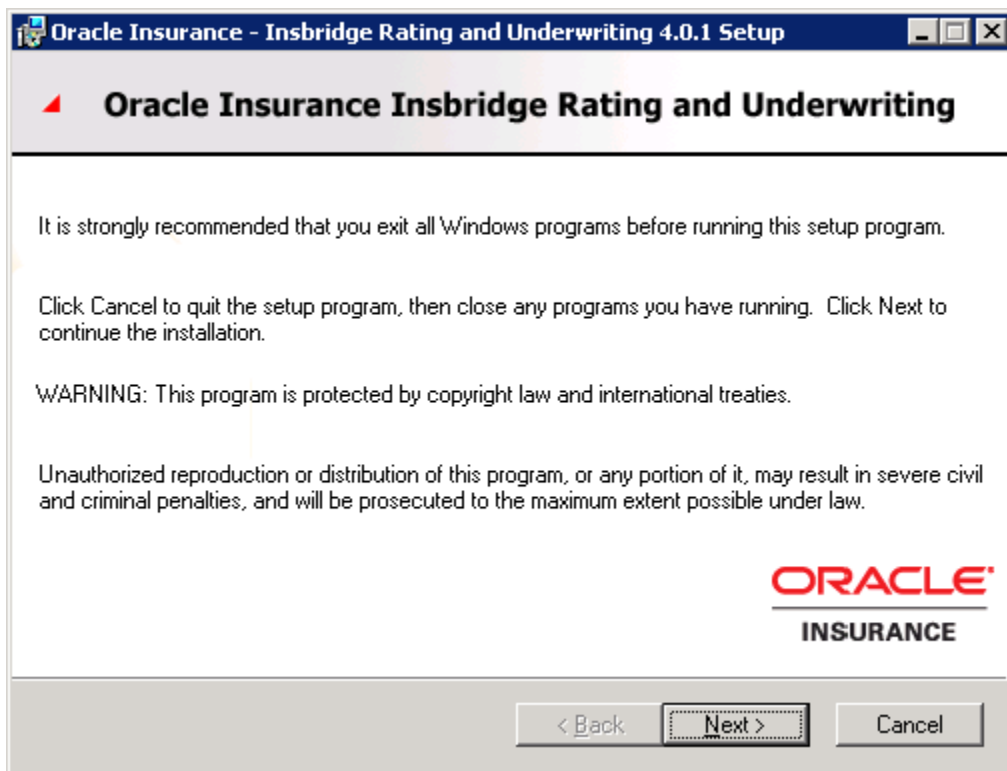


Figure 32 Installing Insbridge

3. Click **Next** to continue.

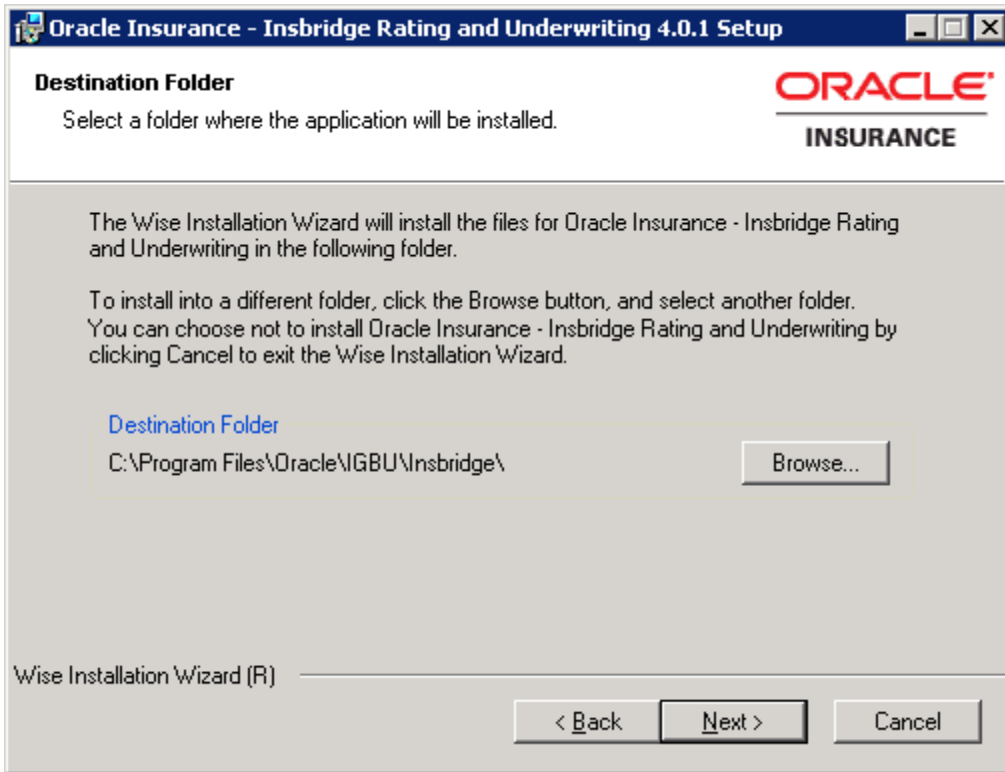


Figure 33 Entering the Destination Folder for Insbridge

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



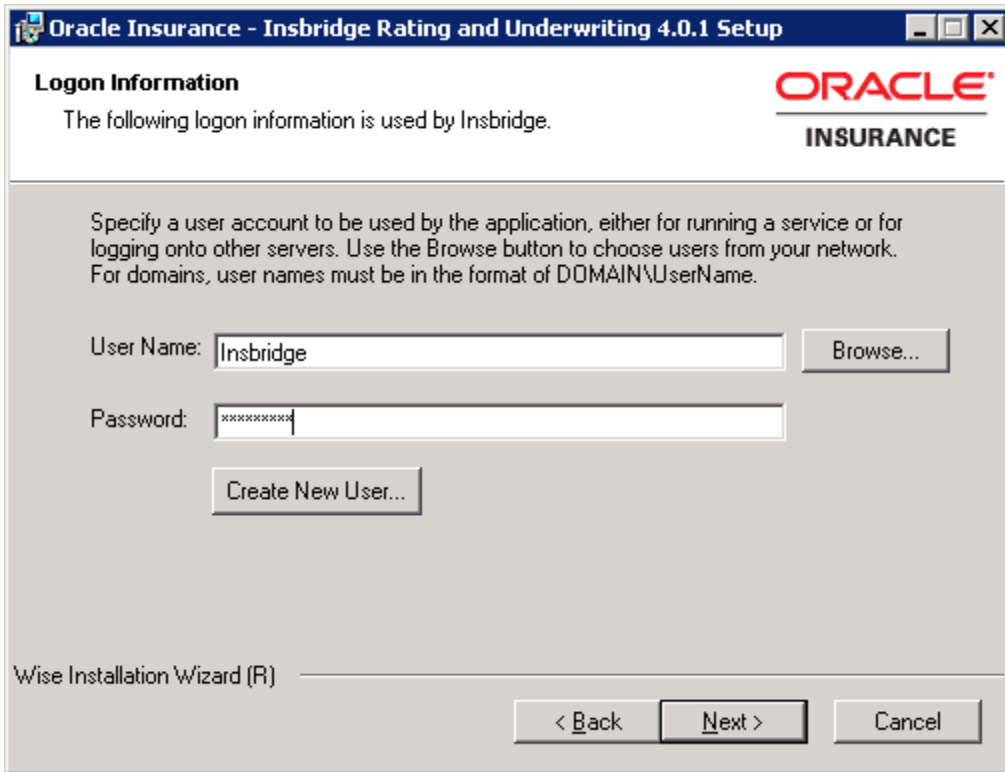


Figure 34 Logon Information

5. Enter the **Insbridge user name and password** for the local user account you set up earlier. The logon information screen will be displayed. You must specify a user account to be used by the application. Please use the Insbridge user account that you set up on page 20.

---

**NOTE:** *You can Create a New user at this point, if needed. Click the Create New User button to be placed on New User screen to setup an Insbridge user.*

---

6. Click **Next** to continue.

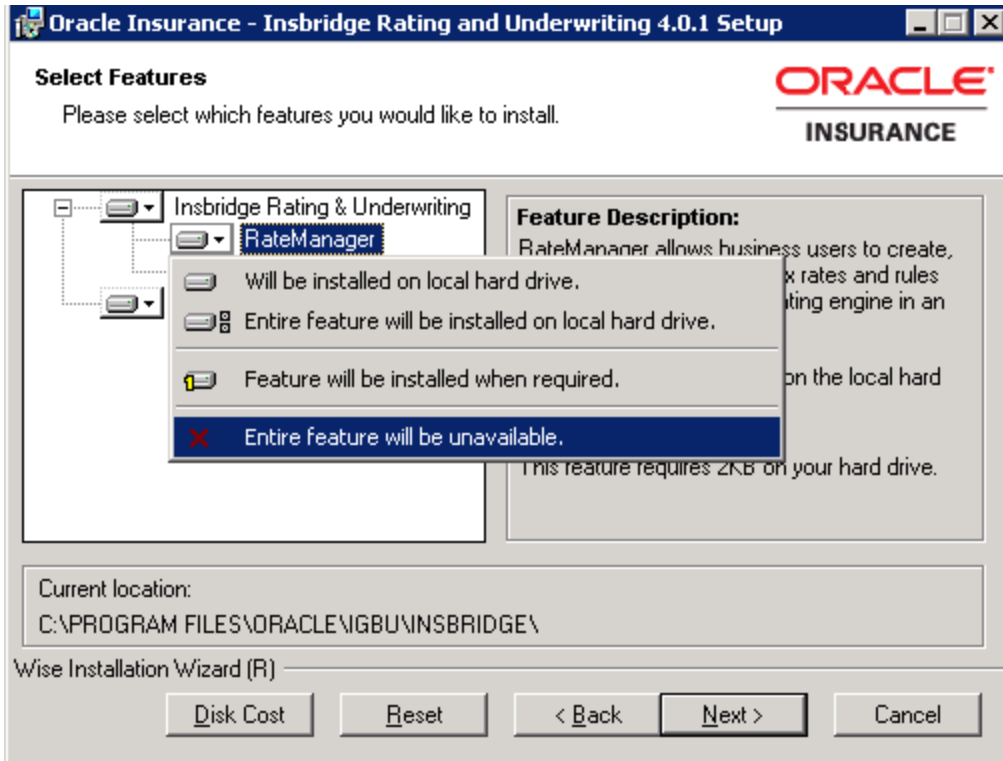


Figure 35 Selecting Features for Installation

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

Options are:

- Insubridge Rating and Underwriting:**
  - The default option is: Entire feature will be installed on local hard drive. This includes IBFA.
  - You will not be able to opt out of this selection.
- RateManager:**
  - The default option is: Entire feature will be installed on local hard drive.
  - You will be able to opt out of this option. **Select Entire Feature will be unavailable.** RateManager will not be installed. **You do not need to install RateManager.**
- IBFA:**
  - The default option is: Entire feature will be installed on local hard drive.
  - You will not be able to opt out of this selection.
- Oracle BI Publisher:**
  - The default option is: Entire feature will be installed on local hard drive.
  - You will not be able to opt out of this selection.
  - This option does not install the OBI Publisher. Only the templates required by the IBRU application will be installed on local hard drive.

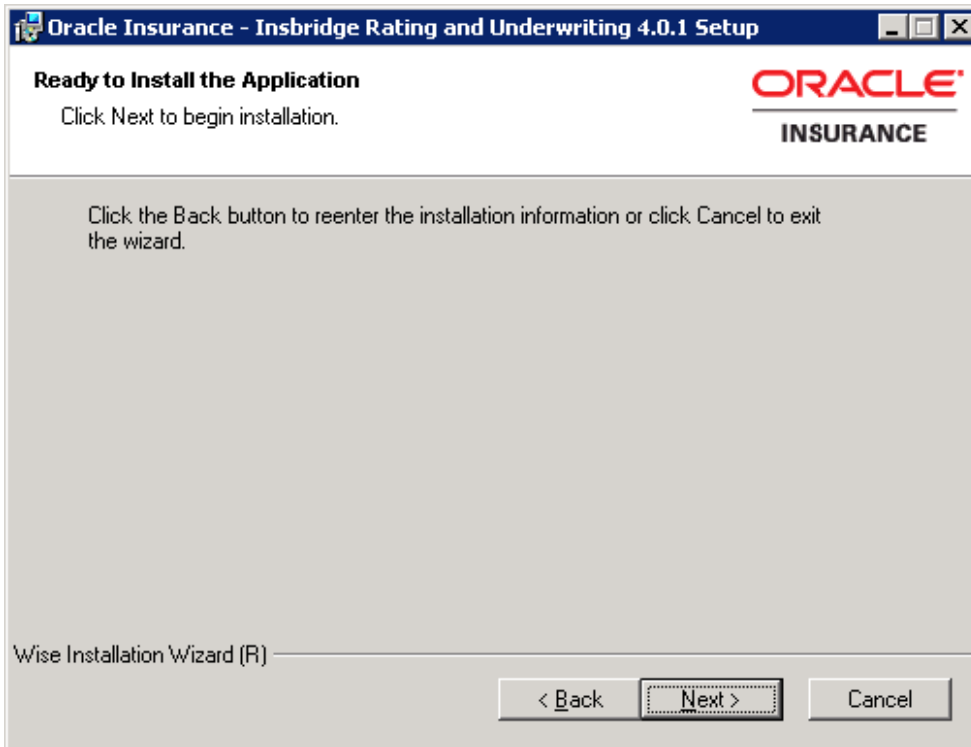


Figure 36 Ready to Install

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

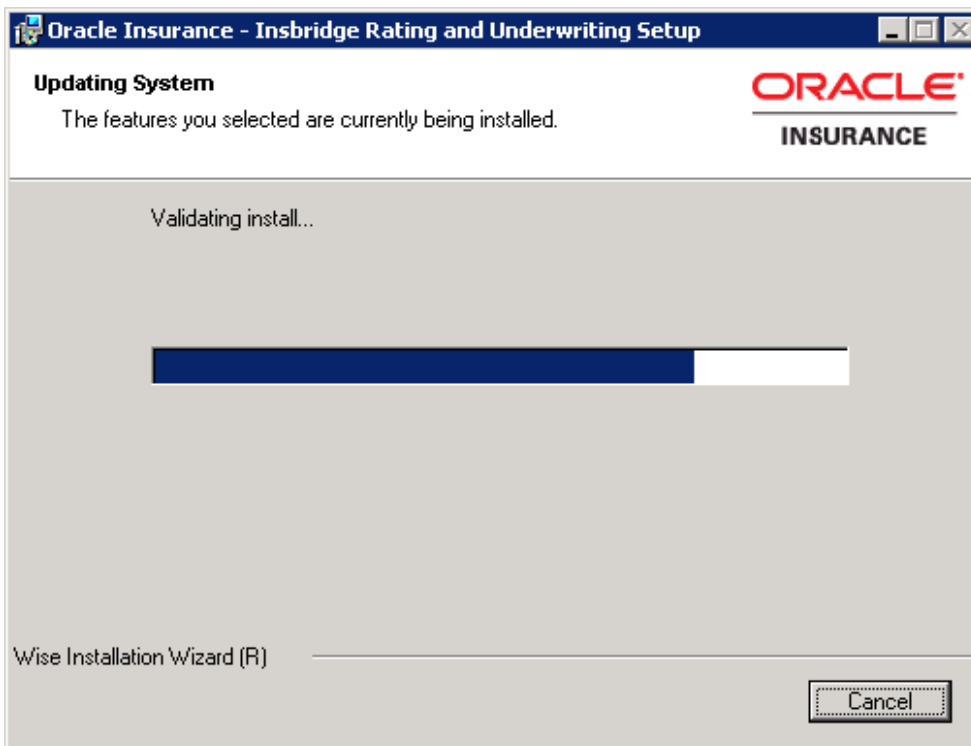


Figure 37 Installation Progress

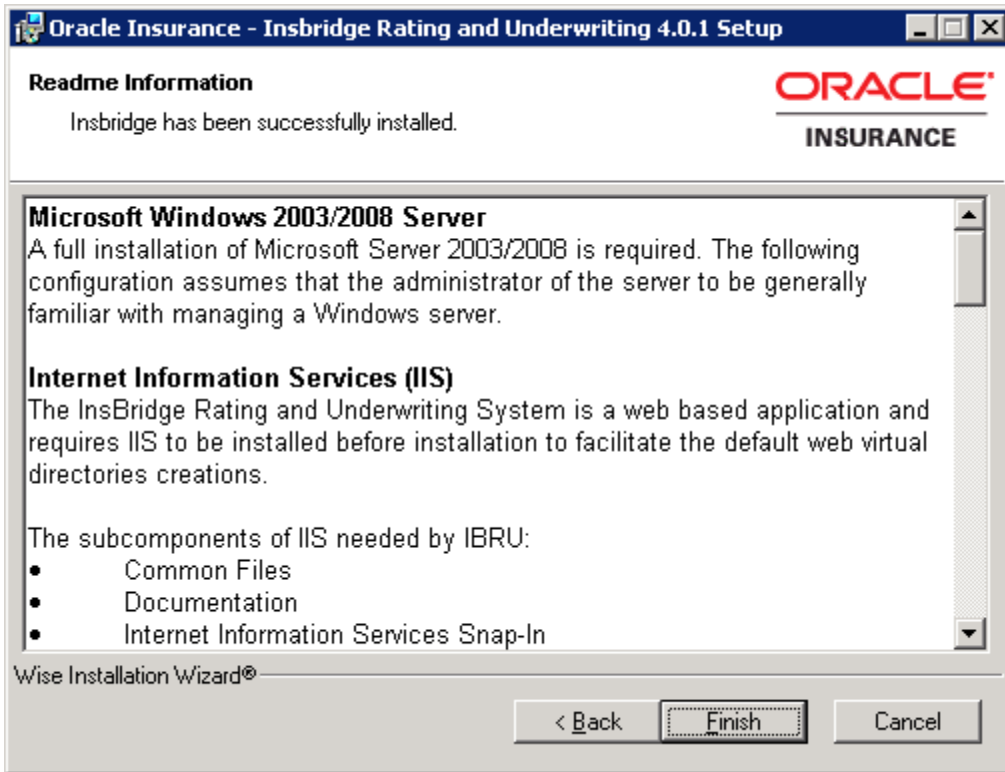


Figure 38 Install ReadMe Screen

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

## STEP 2 – CONFIGURING REGISTRY ACCESS

**WARNING:** If you use Registry Editor incorrectly, you may cause serious problems to the operating system. These problems may require you to reinstall your operating system. Insbridge cannot guarantee that you can solve problems that result from using Registry Editor incorrectly.

By default, only administrative and power user accounts have full permissions over this key. The insbridge user must also be given **full control** over the following registry key:

HKEY\_LOCAL\_MACHINE/SOFTWARE/Insbridge

### Assigning Permissions for the Registry Access

1. Selecting Run from the Start Menu.
2. Type **regedt32**. Click **OK**. The Registry Editor will open.
3. Browse to HKEY\_LOCAL\_MACHINE. Select SOFTWARE→Insbridge.

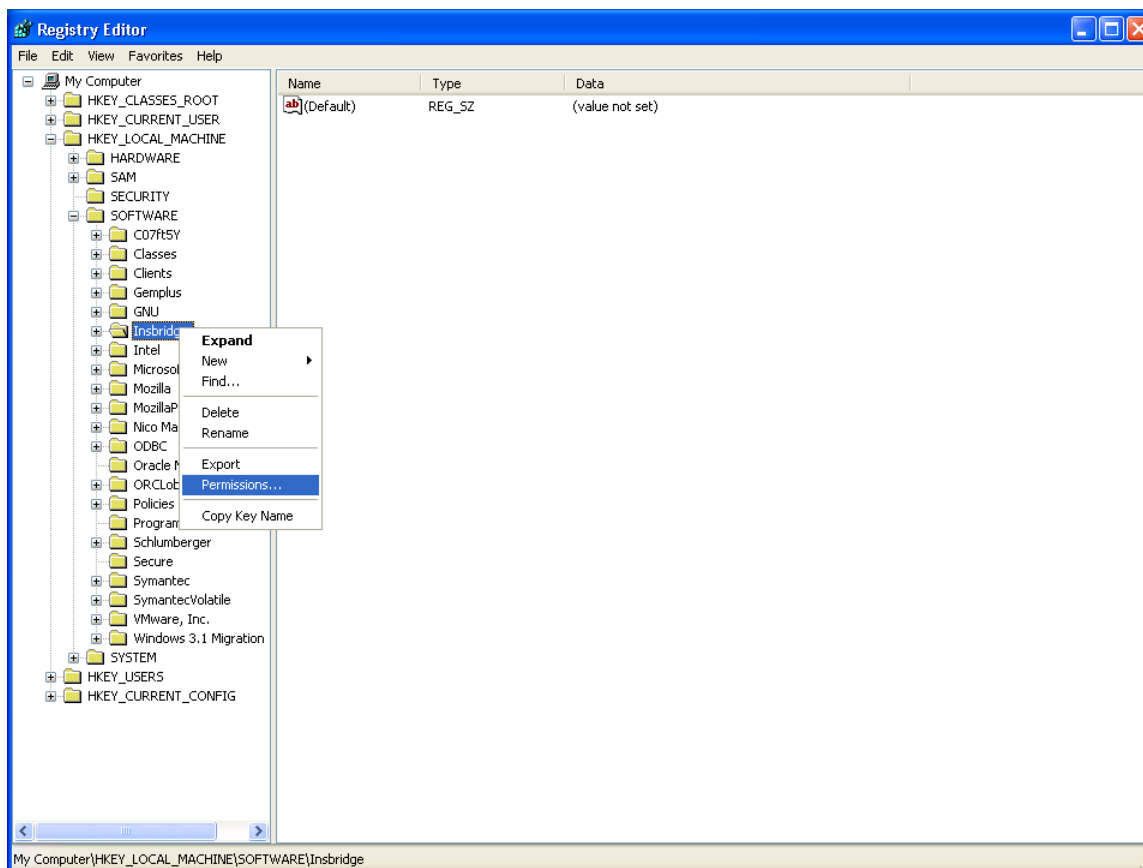


Figure 39 Configure Registry Access Windows Server

4. Right click and select **Permissions**.

5. Click **Add**.
6. On the Select Users or Groups popup, select the **Object Types** and **Locations**.

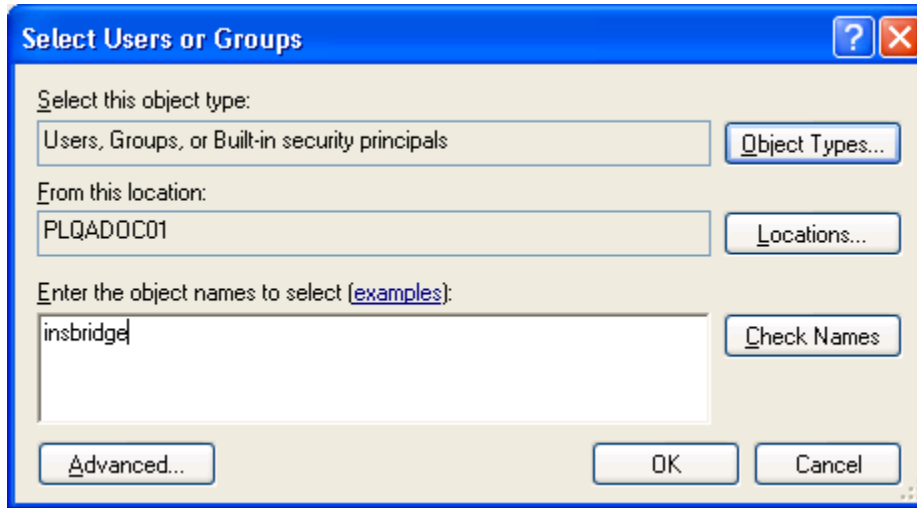


Figure 40 Entering the User

7. Enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, an error screen will be displayed. Cancel out and to return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
8. Once the name is listed, click **OK**.

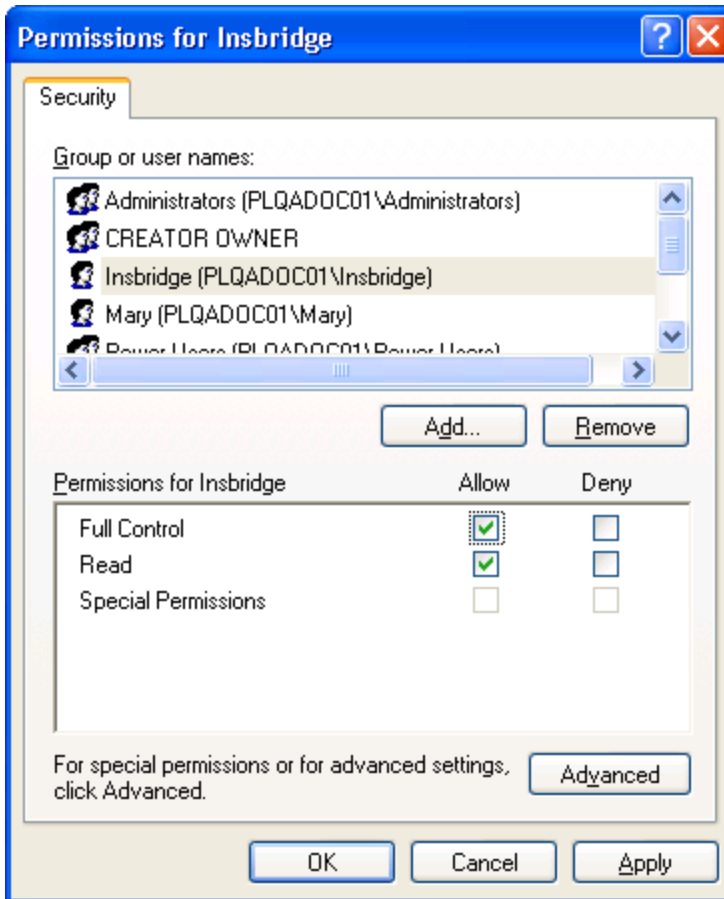


Figure 41 Applying Permissions for 2003 User

9. On the Permissions screen, make sure the insbridge user is highlighted and check to give **Full Control** to the entire Insbridge key.
10. Click **OK**. You can close out the Registry Editor.

## Export Insbridge Registry Key for Backup

The Insbridge registry key located in HKEY\_LOCAL\_MACHINE→SOFTWARE→Insbridge is used to store all information for proper encryption of the SoftRater Packages (SRPs). This registry key should be exported to a text file and stored in a safe location off the server. In the event of a catastrophic server failure and the IBRU system needs to be reinstalled, you will need, and/or be requested to send to Insbridge, your registry key.

1. Select the Insbridge key: HKEY\_LOCAL\_MACHINE→SOFTWARE→Insbridge.
2. Right click and select **Export**.
3. Select a storage location for the file and **Save**.
4. For a SoftRater Node ONLY install, DO NOT close out of Registry Editor. After you create an Insbridge subscriber, you will need to export/import the registry key.

## STEP 3 – ASSIGNING PERMISSIONS – TEMP FOLDER FOR MSMQ

Assigning Permissions for a Windows Temp Folder for MSMQ

1. Open Windows Explorer. Find the WINDOWS folder, most likely on your C drive.
2. Right click the **Windows→Temp** folder.

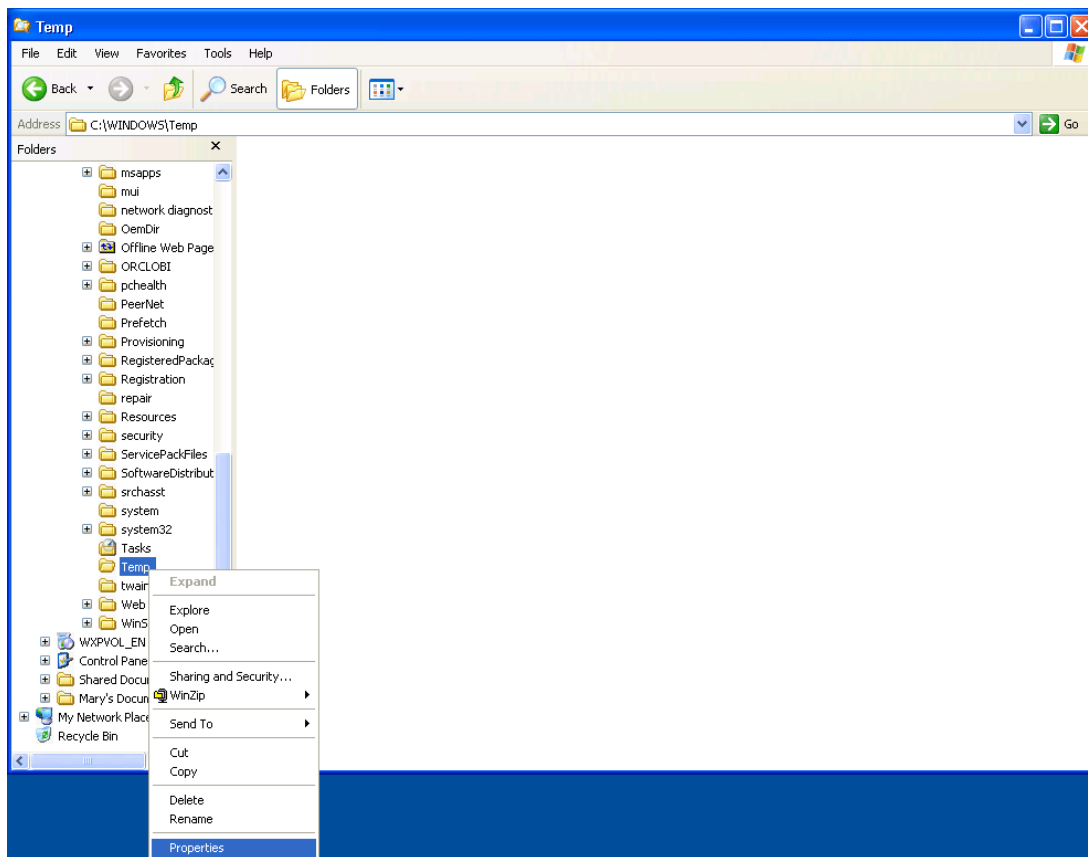


Figure 42 Windows Explorer WINNT Properties

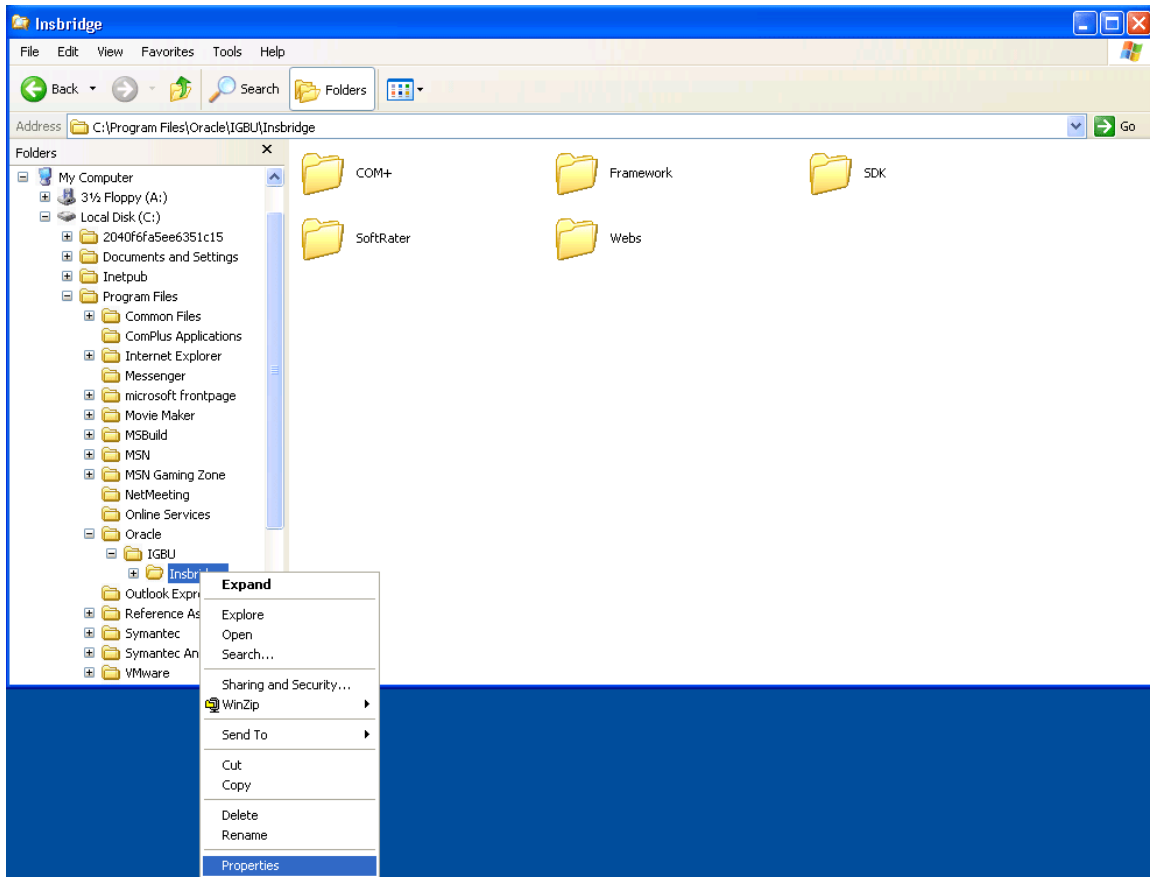
3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users or Groups popup, select the **Object Types** and **Locations**.
7. Enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, an error screen will be displayed. Cancel out and return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
8. Once the name is listed, click **OK**.
9. On the Temp Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.
10. Click **OK**.



## STEP 4 – ASSIGNING PERMISSIONS – INSBRIDGE FOLDER

### Assigning Permissions for an Insbridge Folder Location

1. Open Windows Explorer. Locate the INSBRIDGE folder, most often the Insbridge folder is located at: C:\Program Files\Oracle\IGBU\Insbridge.
2. Right click the **Insbridge** folder.



3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users or Groups popup, select the **Object Types** and **Locations**.
7. Enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, an error screen will be displayed. Cancel out and return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
8. Once the name is listed, click **OK**.
9. On the Insbridge Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.

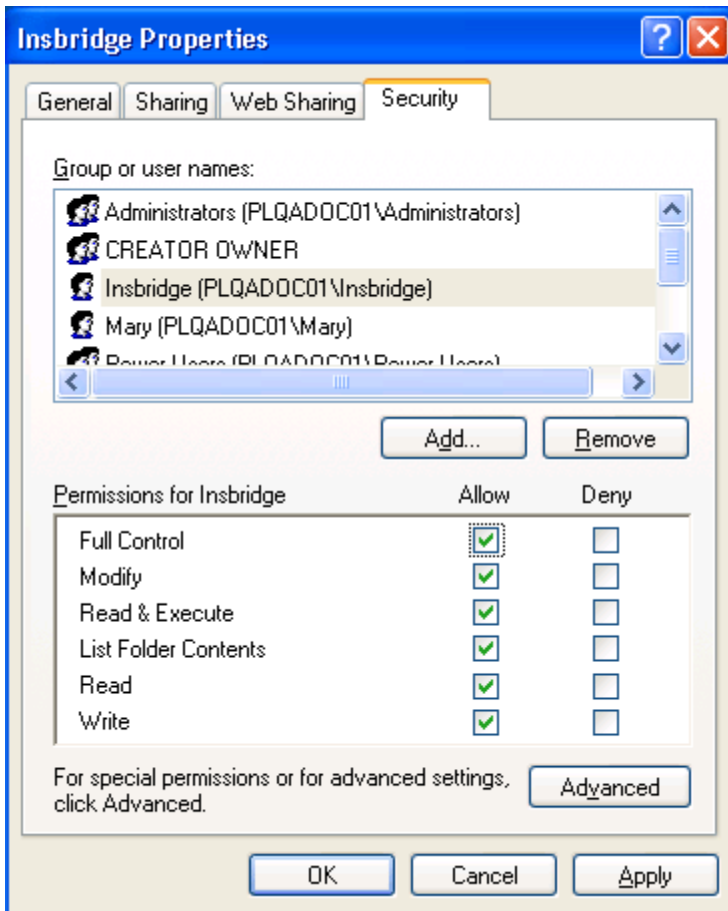


Figure 43 Setting Permission for Insbridge Folder

10. Click **OK**. You can close out Windows Explorer.

## STEP 5 – RESTORING A SOFTRATER DATABASE IN SQL SERVER

Because many corporate environments have a separation between the system administrator and the database administrator, the following process may require both administrators' access and permissions. Make sure you have a SQL Server account called **ibru**.

---

**NOTE:** *If you do not have database permissions, you will not be able to perform the following database procedures.*

---

---

**NOTE:** *If you are unsure how to perform a database restore, please consult with your database administrator.*

---

Currently supported is the default SQL Server collation using SQL\_Latin1\_General\_CP1\_CI\_AS and sort order plus case sensitivity using Latin1\_General\_BIN as the server collation. The security database (IB\_CLIENT) supports the default SQL Server collation using SQL\_Latin1\_General\_CP1\_CI\_AS. The RateManager and SoftRater databases can use either case sensitive or non-case sensitive. Please check with Oracle Insurance for any questions regarding database server sort orders or collations.

1. Located in the Insbridge Installation Directory:

SQL Server

- SoftRater – IBSR
  - o Latin1\_General\_BIN
    - DATABASE\_BACKUP\_IBSR\_TEMPLATE\_CASE\_SENSITIVE.bak
  - o SQL\_Latin1\_General\_CP1\_CI\_AS
    - DATABASE\_BACKUP\_IBSR\_TEMPLATE.bak
  - o Usp\_IBSR\_v03.13.0.sql

2. Select the RateManager backup file you want to use, case sensitive or non-case sensitive. The SoftRater – IBSR file is only non-case sensitive.
3. **Copy the file** to an appropriate database folder on the machine where SQL Server is installed. For example, [Drive]:\Program Files\Insbridge\Databases. If you are unsure of a location, please consult with your database administrator.
4. **Rename the file.** It is not required but it is strongly suggested that the database file name be changed from TEMPLATE to something that defines the database more accurately. At a minimum, it is recommended that you remove “\_TEMPLATE” from the name. You can change the names after they have been restored also.
5. **Open the SQL Server Management Studio** either on the server or remotely using either an administrative account with sa privileges or as the sa account.

---

**NOTE:** *If you do not have SQL Server Management Studio, check to see that the SQL Server Client has been installed. For a SQL Server install, you must have the SQL Server Client installed.*

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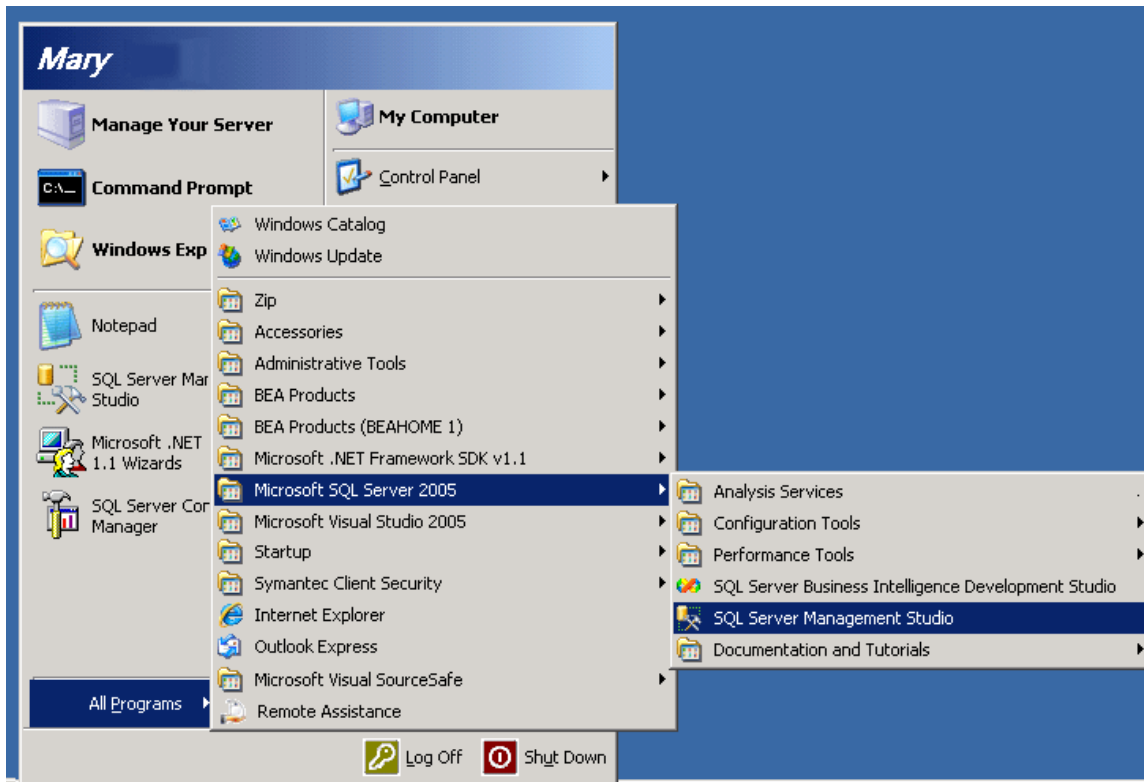


Figure 44 Restoring a Database to SQL Server

6. Go to **Databases**.

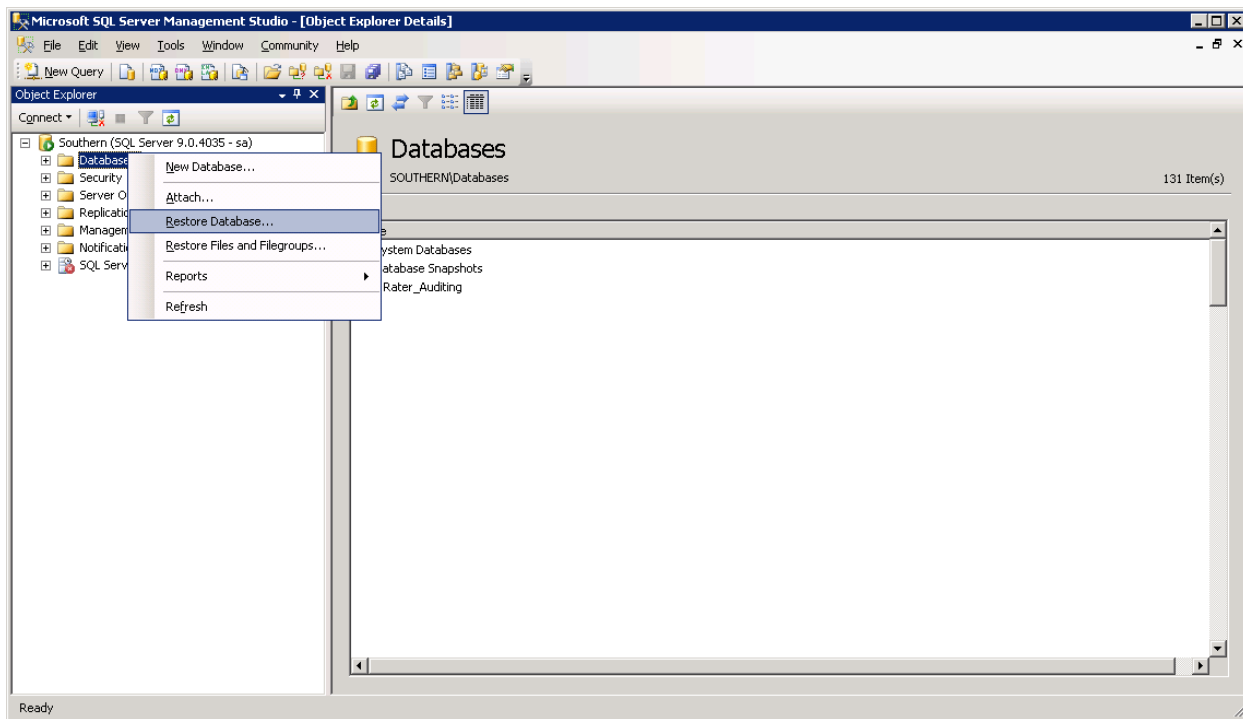


Figure 45 Right Click to Restore Database

7. Right click on **Databases**.
8. Select **Restore Database...** A separate screen will be displayed.

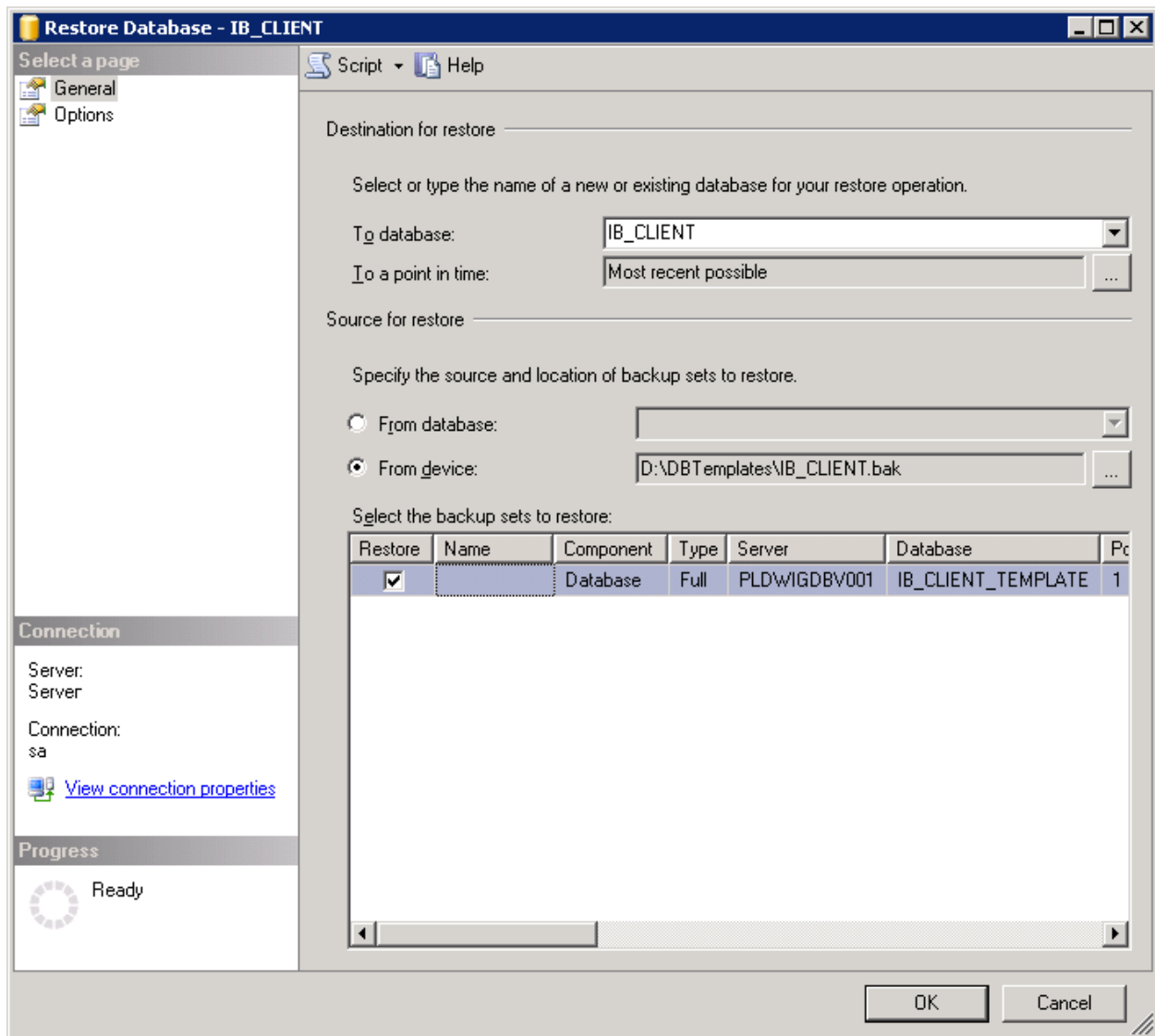


Figure 46 Restoring a Database

9. Enter your IBSR database name in **To Database:**.
10. Select **From Device**. Click ... to browse to the location where the database files were placed in step 2.
11. Select your database **IBSR\_ xxxx.BAK**, where **xxxx** equals the renamed file from step 3.
12. Click **OK**. Your database will be populated.
13. Verify your information. Check the **Restore** box.

14. Click **OK**.
15. If the database was restored successfully, it will be displayed in the database folder. If not, please correct any errors and try again.
16. Once the database is restored to SQL Server, you will need to create or assign a SQL Server user account for the application. This user will be used for the connection to the databases when setting up the connections from the Insbridge Framework Administrator. Make note of the account you want to use. This information will be entered into the Insbridge Framework Administrator.

For ease of administration, the database user should have **db\_owner** permissions on the IBSR\_XXXX database.

## STEP 6 – CONFIGURING INSBRIDGE FRAMEWORK ADMINISTRATOR

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

http://SERVERNAME/ibfa/

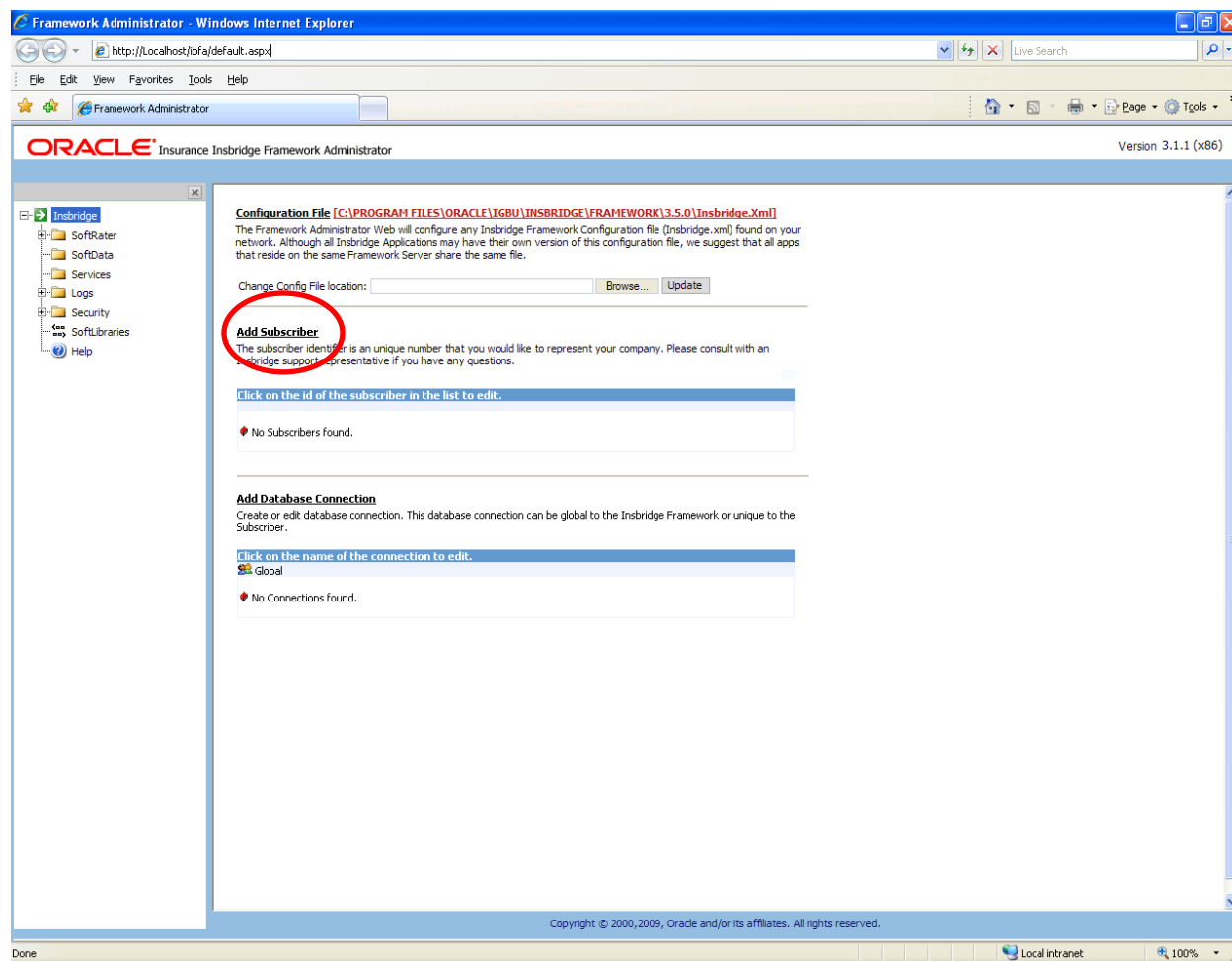


Figure 47 IBFA Home

---

**NOTE:** If you receive an access denied error message, please verify that you have given the Insubridge user full control of the Insubridge folder.

---

---

**NOTE:** If you receive an IDNX denied error message, please verify that the Insubridge user has full control over the Insubridge directory. Regedt->Insubridge Directory-> Security.

---

4. Click on **Add Subscriber** and in the next dialog.

The Type, ID and Name information for the new subscriber is chosen by you. The Type, ID and Name are fixed after the first time you save. These entries cannot be edited. Only the description can be edited.

---

**NOTE:** Use the same subscriber ID number as in the Development environment.

---

The Subscriber ID can be a 3 or 4 digit number and must be unique for each subscriber per instance of IBFA. For example, if you have an instance of IBFA on machine A, you can create a subscriber with an ID of 100. On machine A, if you create another subscriber, you must give that subscriber a different ID number, say 200. If you also have an instance of IBFA on a different machine, B for example, you should duplicate the same subscribers with the same ID numbers on machine B.

If you require assistance or are unsure of what action to take, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.

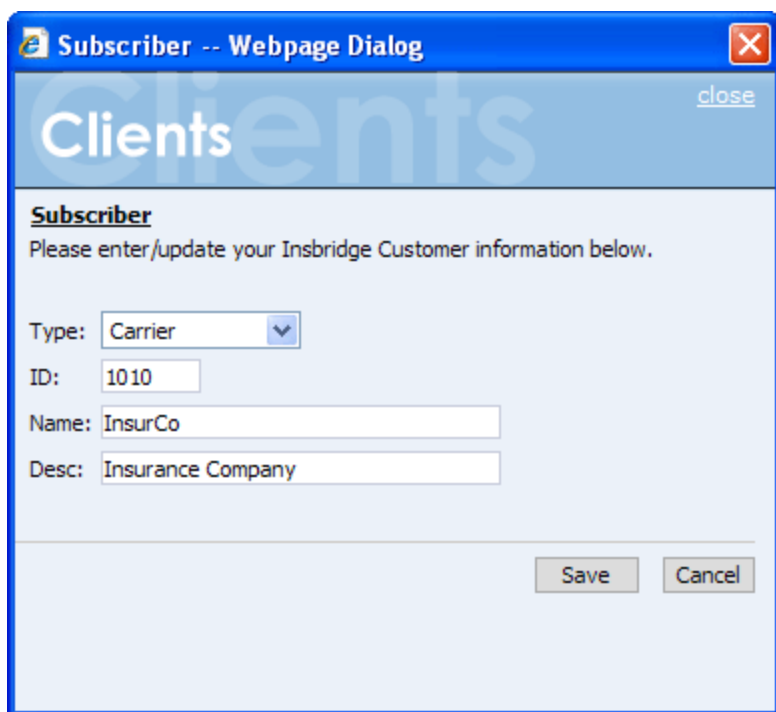


Figure 48 Enter ID

If you receive an error message or have difficulty creating a subscriber, you may need to add the Insbridge user to the Windows Machine Keys.

1. Go to C:\Documents and Settings\All Users\Application Data\Microsoft\Crypto\RSA\MachineKeys.
2. Right click and select Security.

Add the Insbridge user.

---

**NOTE:** If you have renamed the databases, please make note of the new names.

---



Next, create the default rating environments for the RateManager system.

It is recommended that you create one logical environment:

- SR – to identify the location of the local SRPs and the QA IBSR DB.

1. Browse to **SoftRater**→**Explorer**→**Subscriber name**.

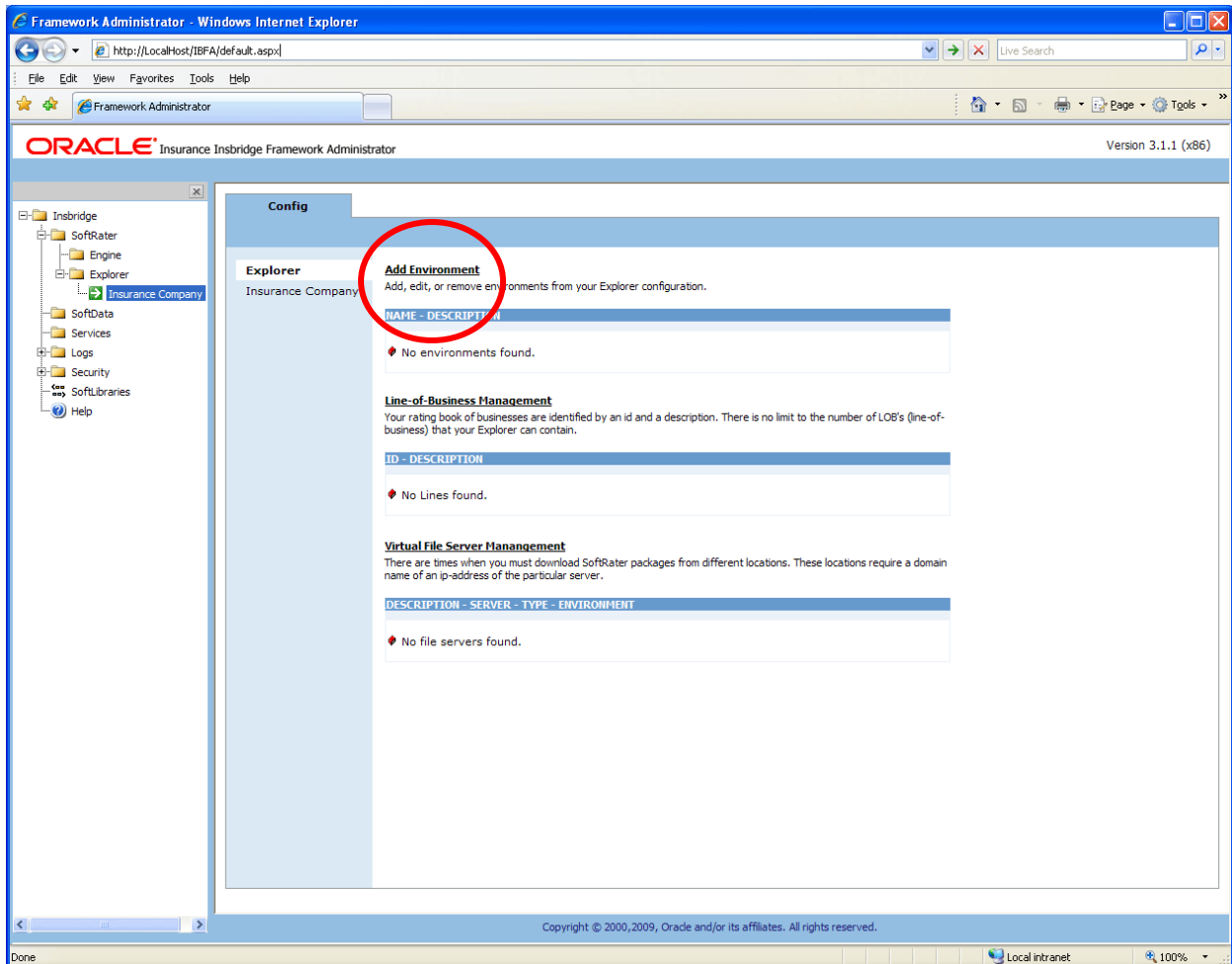


Figure 49 Create a Rating Environment

2. Click on **Add Environment**.

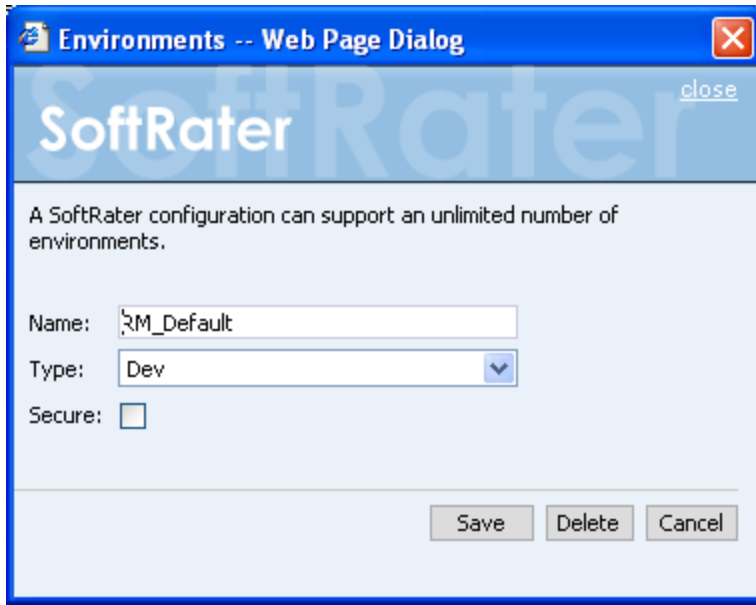


Figure 50 Entering Name and Environment

3. Enter a Name and select a Type. The name and type are totally dependent on how your IBRU system is designed.

There are three types of Logical Environments:

- **Development**
- **Quality Assurance**
- **Production**

After you have entered your logical environment, you must define it.

### Defining the Logical Environment

4. Select your company name underneath Config on the left hand side to enter the configuration information for the newly created logical environment.

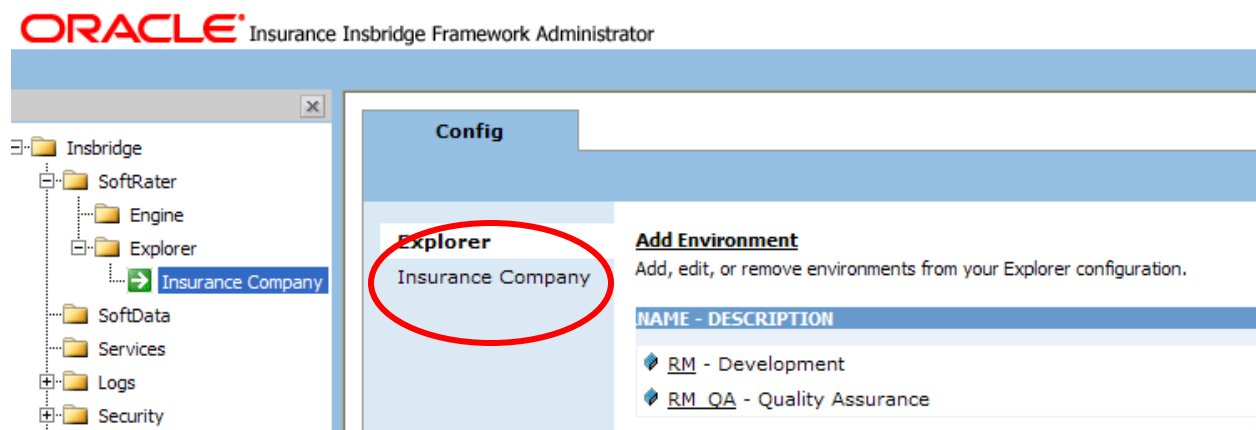


Figure 51 Obtaining Environment Information

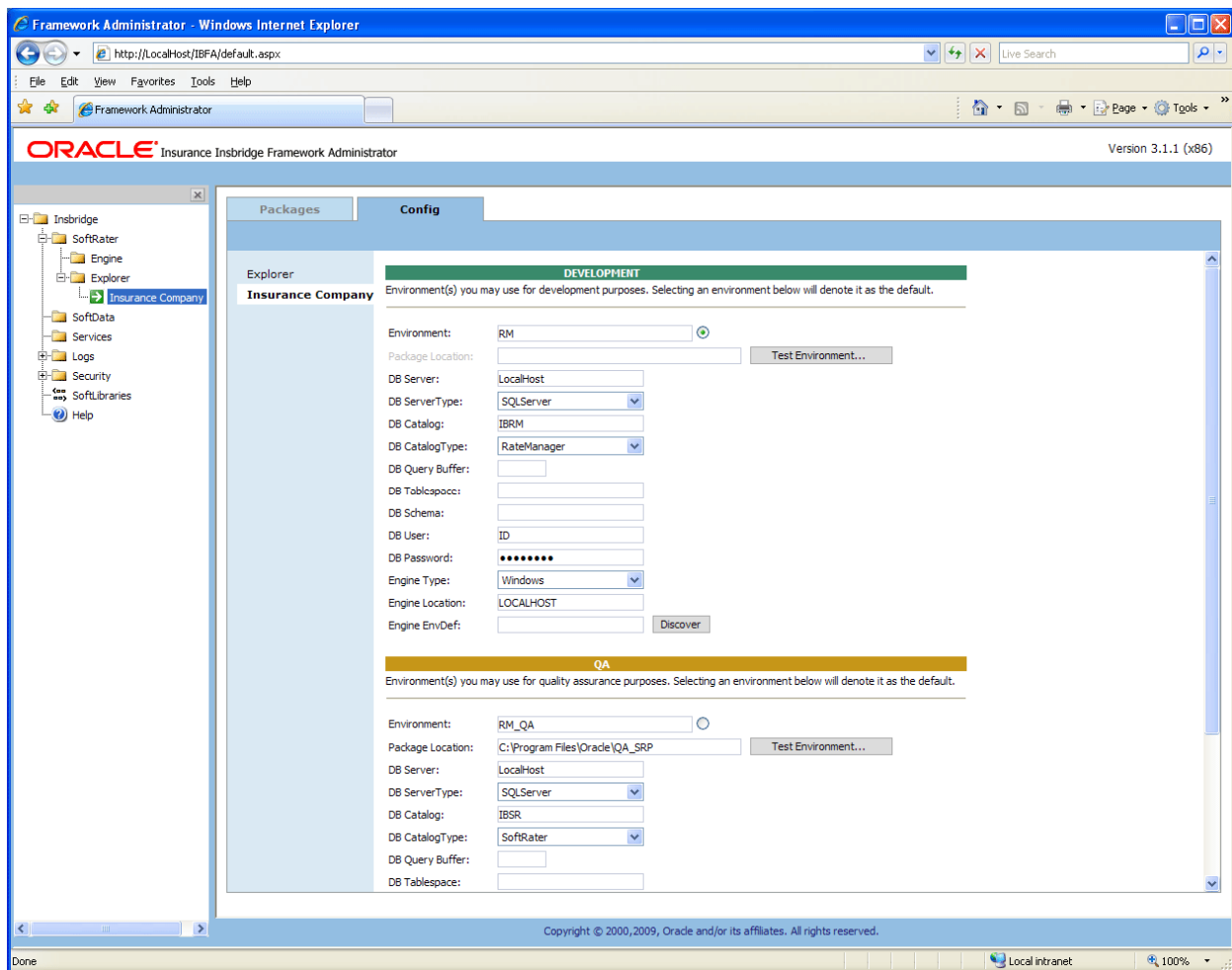


Figure 52 Editing Environment

- Only the information shown above is required for this connection; Environment, DB Server, DB Server Type, DB Catalog, DB Catalog Type, DB User, DB Password, Engine Type and Engine Location. The Package Location, DB Query Buffer, DB Tablespace, DB Schema, and Engine EnvDef can remain blank or filled out as needed. The user account should be the database owner (ibru).

For each environment, you can set up the following information:

**Environment:** The name of the environment. Selecting the radio button next to an environment's name will set it up as the default environment.

**Package Location:** Physical location of where the packages should be stored. Click **Test Environment** to run a process to validate the permissions on the directory and certify any packages in the directory. In order for the Framework Administrator to successfully manipulate packages in the location, it must have full control of the directory.

**DB Server:** The name of the server that houses the database that packages will be loaded to. For DB2 servers, this is the DB2 Registered Alias Name. For Oracle servers, this is the server name; either IP or DNS will work. The Database listener port number will also need to be appended to the server name if it is something other than the default port.

The format for this is as follows: [SERVER NAME]:[PORT NUMBER]

**DB Server Type:** The type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2.

**DB Catalog:** The name of the catalog in the database. For DB2 servers, this is the System DSN Name. For Oracle servers, this is the instance.

**DB Catalog Type:** The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.

**\*DB Query Buffer:** For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.

**\*DB Tablespace:** For future use.

**\*DB Schema:** The name of the schema that defines the structure of the database. This information may be obtained from the Oracle DBA.

**DB User:** Username to access the database. This information may be obtained from the Oracle DBA.

**DB Password:** Password to access the database. This information may be obtained from the Oracle DBA.

**Engine Type:** The type of SoftRater engine that is used. The available options are: Windows, WebSphere, WebLogic, or JBoss.

**Engine Location:** The location of the SoftRater engine. If the engine is local to the Framework Administrator (i.e. located on the same server), leave this field as LOCALHOST. If the engine is located on a different server, enter the name in the box.

**Engine EnvDef:** This field should remain blank, unless the engine is located on a different server. If the **Engine Location** is set to LOCALHOST, leave this field blank. If the **Engine Location** is not LOCALHOST, this should match the name of the environment on the remote server.

---

**NOTE:** *If you are using an Oracle or DB2 server, the options and requirement will be different. Please see the Insbridge IBFA User Manual (Located in the User Guides directory) for more information.*

---

After you have entered your information, scroll to the bottom of the page and click **Save** to save your environments.

## Adding a Virtual File Server

Virtual file server management allows you to set up a link to servers that are in different locations where packages can be downloaded. In a typical QA environment, you will set up a Virtual File Server to point back to the QA logical environment that you created in your RateManager Development environment.

This step is necessary if you want to copy and load packages from environment to environment, however, if you do not have the information ready. You can do this at a later time.

1. From the Configuration Page, click the **Virtual File Server Management** link.

#### **Virtual File Server Management**

There are times when you must download SoftRater packages from different locations. These locations require a domain name of an ip-address of the particular server.



Figure 53 Virtual File Server Management Screen

2. This will open the **Virtual File Server Management** window.

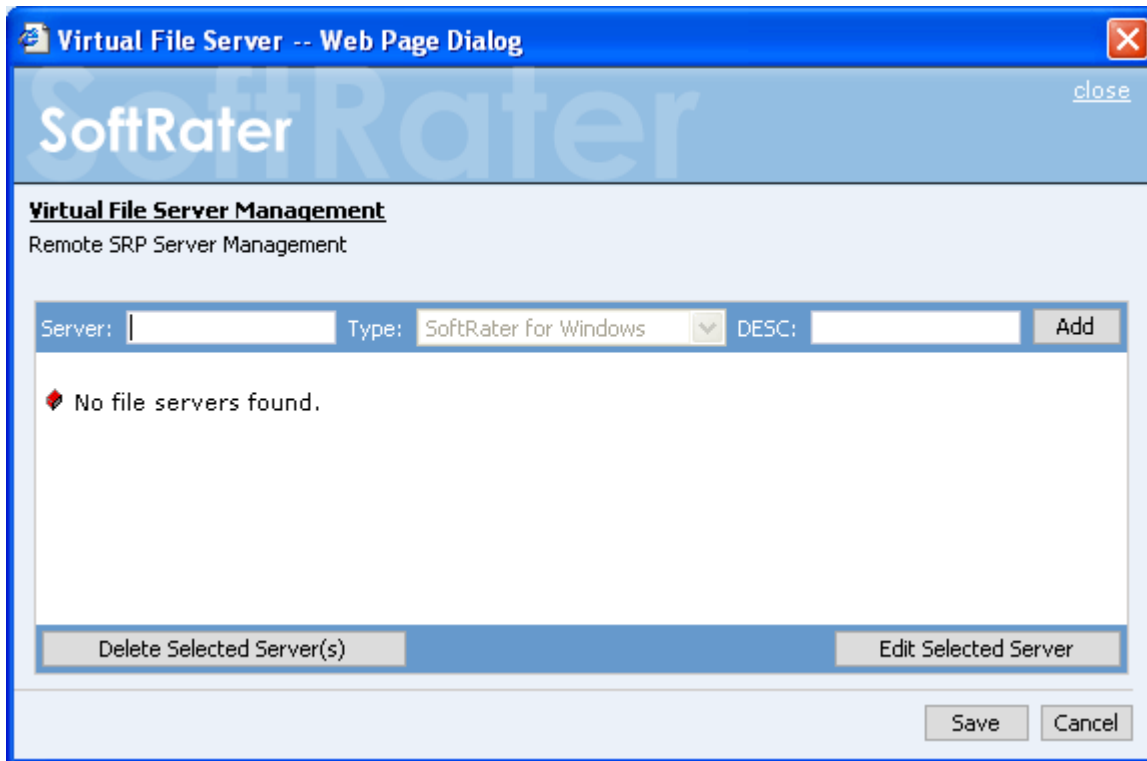


Figure 54 Virtual File Server Management Window

3. Enter the name of the server and a description. Take care when entering the server name. This field cannot be edited. If you have made a mistake, you must delete and re-enter.
4. Click **Add** to add the server to the list. Enter in as many servers as you need.
5. When you are finished, click **Save** to save your work and return to the previous screen.

## STEP 7 – UPDATING THE COMPONENT SERVICES

Next, you will need to update the component services.

1. Click **Start→Programs→Administrative Tools→Component Services**.
2. Expand the **Component Services** option under console Root.
3. Expand **Computers→My Computer→COM+ Applications**.
4. Expand each Insbridge **COM+ library** to make sure there are components listed underneath each compartment.

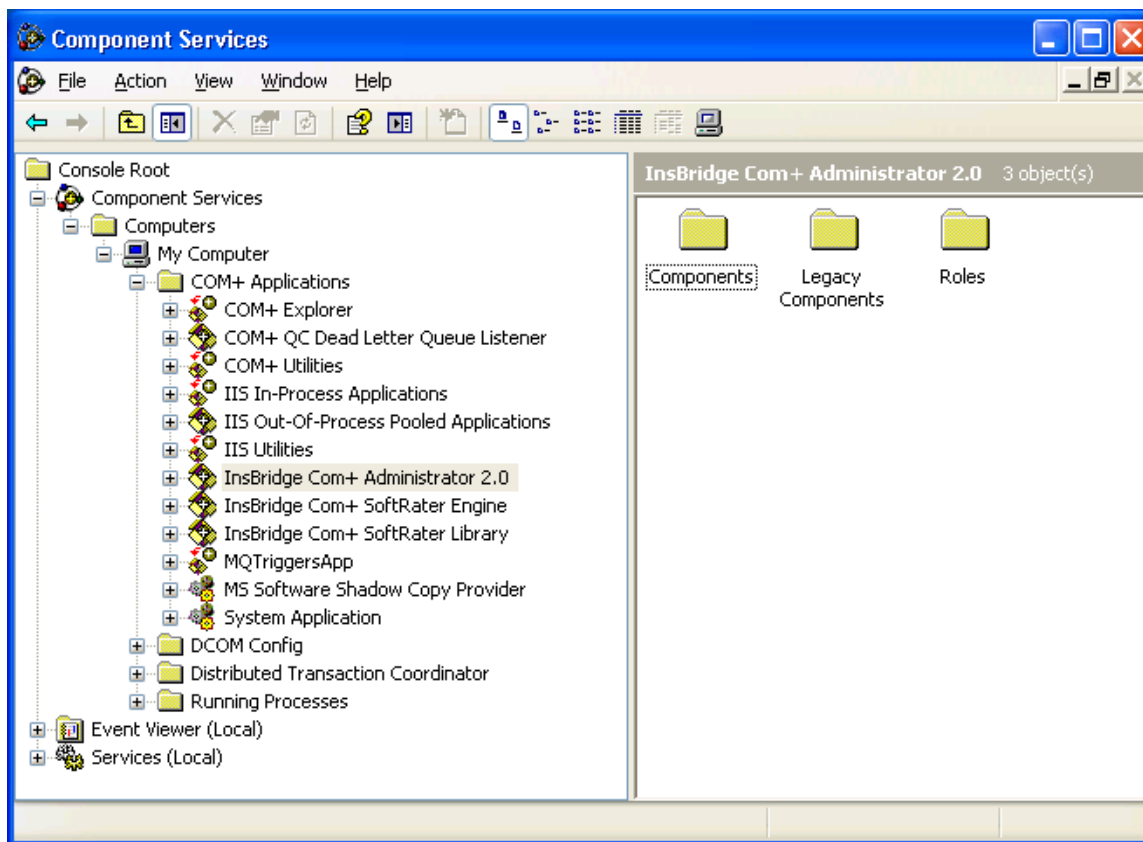


Figure 55 Component Services

There should be 3 Insbridge Com+ Applications libraries:

- Insbridge Com+ Administrator 2.0
- Insbridge Com+ SoftRater Engine
- Insbridge Com+ SoftRater Library

Please note that you will not have to make any changes to any COM+ Application library. The installation will automatically apply the Insbridge user name and password that you created earlier to the necessary libraries. If you change the password, you will have to change the password in all three of the Insbridge

Com+ libraries. On each library, right click, select Properties, select the Identity tab, enter in the new password.

---

**NOTE:** *If any COM+ library is missing, run the IBRU install again from the msi file and choose uninstall. Then rerun the IBFA install. Uncheck the RateManager Install. Then check again to see if all the libraries are listed. If they are still not listed, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.*

---

## For Windows Server 2008

1. Click **Start→Administrative Tools→Component Services**.
2. Expand the **Component Services** option under console Root.
3. Expand **Computers→My Computer→COM+ Applications**.
4. Expand each Insbridge **COM+ library** to make sure there are components listed underneath each compartment.

## STEP 8 – EXPORT AND IMPORT SUBSCRIBER REGISTRY KEY FOR SOFTRATER NODE INSTALLATION

The Insbridge registry key located in HKEY\_LOCAL\_MACHINE→SOFTWARE→Insbridge is used to store all information for proper encryption of the SoftRater Packages (SRPs). This registry key should be exported using **regedt32** to a text file and stored in a safe location off the server and/or sent to Insbridge in the event of a catastrophic server failure and the IBRU system needs to be reinstalled.

1. On the server where RateManager is installed, open regedt32, then navigate to the HKEY\_LOCAL\_MACHINE→SOFTWARE→Insbridge→Subscribers→SUBSCRIBER\_NAME where SUBSCRIBER\_NAME equals the name as entered on page 71.
2. Select the Registry menu option and select export.

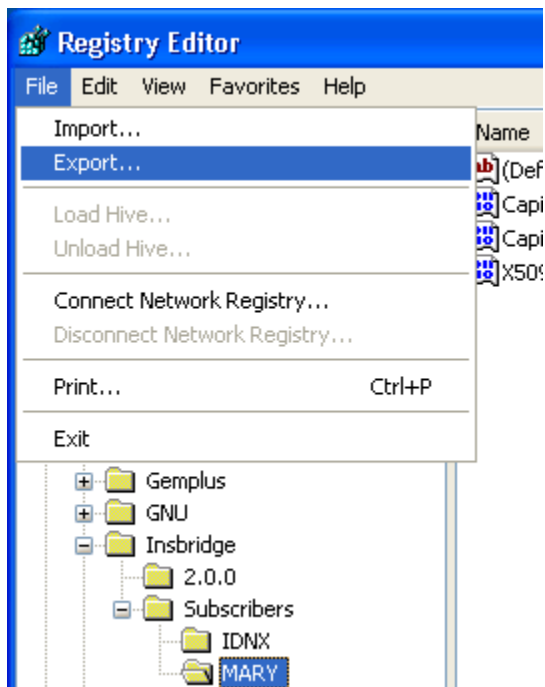


Figure 56 SoftRater Node Installation

3. Enter the key file name and save this to the desktop.
4. Copy this file to the SoftRater Node on the receiving IBFA.
5. Double-click this file. You will be asked if you wish to continue to import this data into the registry. Select **Yes**.
6. If the import was successful, then you will receive a report that it was successfully installed. If the import fails, please correct the error and try again.

Now the encryption on the RateManager server where the SRPs are created and the SoftRater Node where the SRPs are loaded match.



## STEP 8 – ALLOWING FOR WCF ACTIVATION

**FOR WINDOWS SERVER 2008 ONLY. Windows Server 2003 can skip this step.**

WCF Activation is required for web services. RateManager makes call using IBFA web services. If this is not activated, users will experience errors.

1. Select Start→Administrative Tools→Server Manager.
2. Select Features Summary. Scroll through the list to verify WCF Activation has been activated.
3. If not, select Add Features. The Add Features Wizard will be displayed.

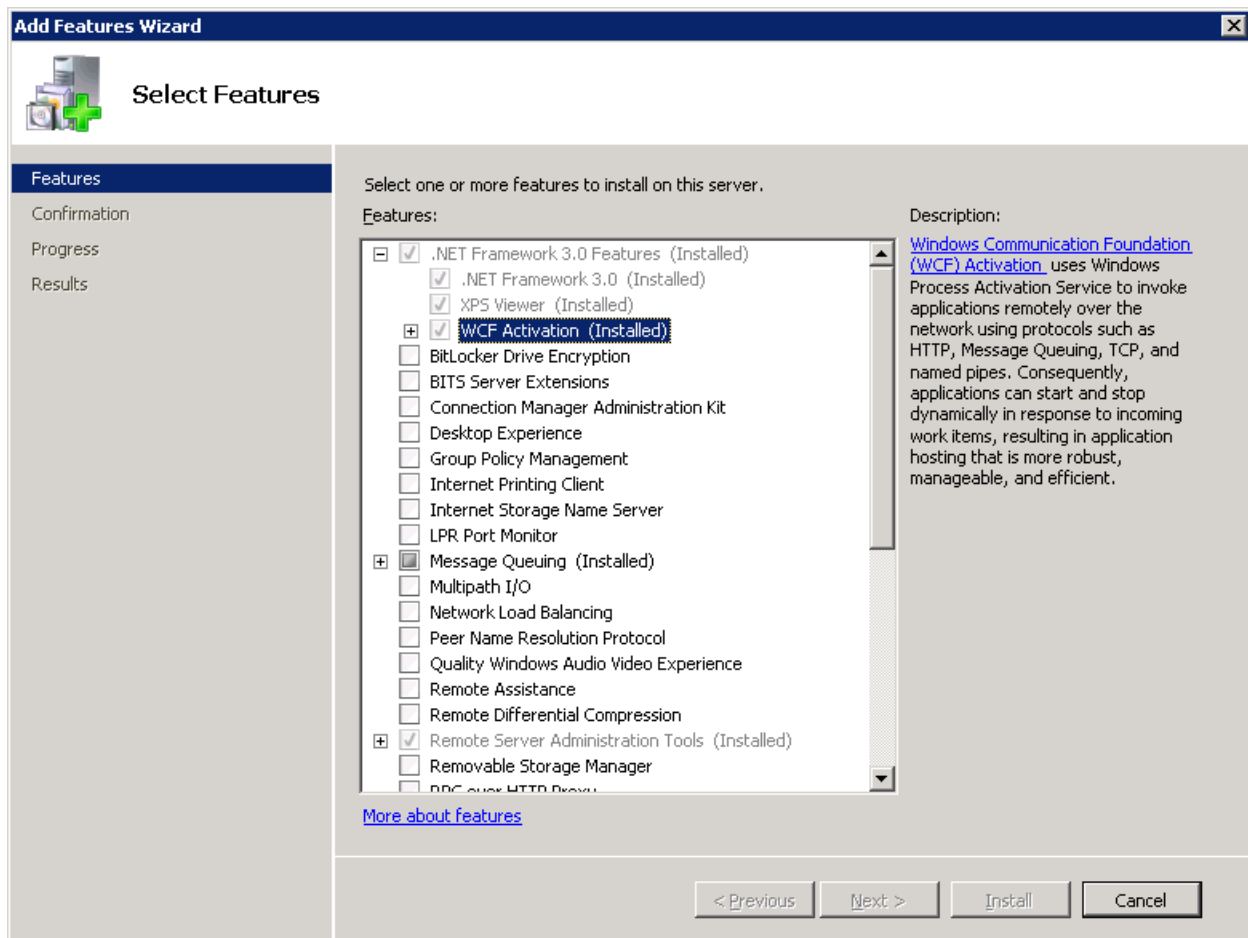


Figure 57 Selecting WCF Activation

4. Select WCF Activation. Click NEXT.
5. Confirm your selection and click INSTALL. The installation will proceed.
6. You can close out when complete.

## STEP 10 – INSTALLING THE OBI PUBLISHER

OBI Publisher is necessary for reports. If you do not plan on using reports in IBFA, you do not need to install this program.

1. Unzip the OBI\_PUBLISHER

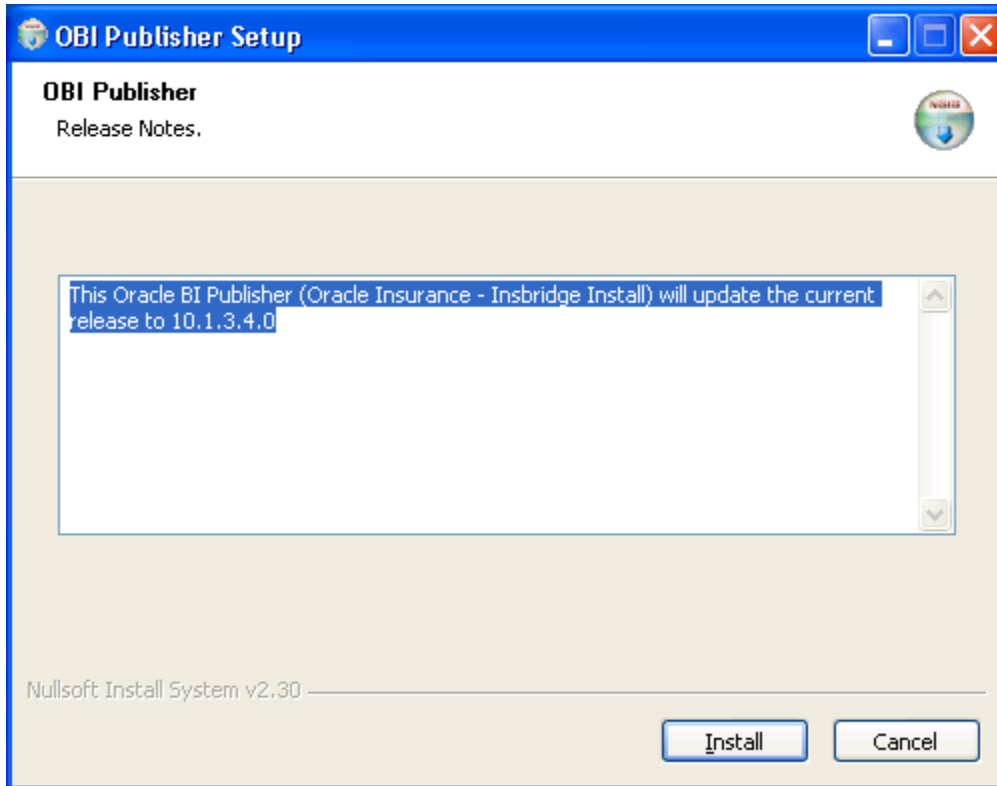


Figure 58 Installing OBI Publisher

2. Click **Install**. A progress screen will be displayed.
3. When complete, click **Close**.
4. In order for OBI Publisher to be available to users, you must start the **Insbridge Message Service**. The Insbridge Message Service can be started from IBFA or from Services in Windows 2003 or the Server Manager in Windows 2008.

It is also recommended that you start the **Insbridge Task Manager** as well. The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status.

## Starting Insbridge Services

It is also recommended that you start the **Insbridge Task Manager** as well. The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status.

### **Insbridge Message Service**

The Insbridge Message Service is a Message Queue Listener that will route all batched messages to an assembly (process) for execution. These processes may take resources and time to execute. Please consult with your system admin before configuring the number of listeners per process.

**Message Process**

Batch Rating

If you see this message, you have not requested a listing from the selected spoke client. Clicking View Messages will provide you with a list view of the first in - first out messages that are waiting to execute.

### **Insbridge Task Manager**

The Insbridge Task Manager gives you the ability to execute daily, weekly, hourly, or by the minute.

(This process may take a while to execute)

TASK	LAST RUN-DATE	START-TIME	STATUS
------	---------------	------------	--------

Figure 59 Insbridge Services Screen

1. In **IBFA**, navigate to the **Services** page.
2. Next to Insbridge Message Service, click . After a few seconds, the buttons will refresh to indicate that the service is started.
3. Next to Insbridge Task Manager, click . After a few seconds, the buttons will refresh to indicate that the service is started.

---

**NOTE:** The location and port for OBI Publisher is <http://localhost:9704/xmlpserver/>. This information may be needed if you have to make a request to your company's infrastructure and request the security team to open the ports used by Publisher.

---

# INCORPORATING AN ORACLE DB

The Windows environment utilizing an Oracle database example will be displayed by machine and contains 3 application servers and 2 database servers. There are still three environments; development, QA and Production. The Oracle database server will contain two separate databases. Clear and precise naming of the associated databases is recommended.

RateManager and IBFA must run on a Windows Server machine. No other operating system will be required. RateManager will be loaded in one environment only.

## THE SETUP

1. All three application machines would create the same subscriber ID. The subscriber ID must be uniform across all environments.
  2. In the **Development** environment:
    - a. RateManager and IBFA/SR-WIN would be located on the same Windows machine.
    - b. OBI Publisher is installed for reports to be created.
    - c. On the IBFA/SR-WIN for this environment, three database connections would be created and two logical environments would be created.
    - d. Two databases would be restored to a separate SQL Server machine.
  3. In the **QA** environment:
    - a. IBFA/SR-WIN would be located on a Windows machine.
    - b. OBI Publisher is installed for reports to be created.
    - c. The Oracle client would be run.
    - d. On the IBFA/SR-WIN for this environment, one logical environment and one virtual file server would be created.
    - e. One database would be restored to a separate Oracle DB.
  4. In the **Production** environment:
    - a. IBFA/SR-WIN would be located on a Windows machine.
    - b. OBI Publisher is installed for reports to be created.
    - c. The Oracle client would be run.
    - d. On the IBFA/SR-WIN for this environment, one logical environment and one virtual file server would be created.
    - e. One database would be restored to a separate Oracle DB.
1. The **Oracle** Server:
    - a. Requires that the Oracle DBA run the DDLs.
    - b. Requires that the Oracle DBA create a DT table for each line of business in each of the two databases created. The subscriber ID and line of business number will be required.

This is a basic Windows setup with the addition of an Oracle database. You can add another environment if necessary. For example, if you wanted to create a training environment or a second level of testing, you could add these environments in where you wanted.

## Example

IBRU Installation/Setup – Windows Incorporating an Oracle DB				
Development Windows	SQL	QA Windows	Oracle	Production Windows
<p>Rating and Rules Authoring</p> <p><b>INSTALL:</b> IBFA RM OBI Publisher</p> <p><b>CREATE SUBSCRIBER</b> Must be the same in all environments</p> <p><b>ADD DB Connections:</b> Controller Security RM</p> <p><b>CREATE:</b> Logical Environments: RM – to handle testing/rating. QA_SR – This environment contains the full packages to be consumed by QA</p> <p><b>PURPOSE For setting up this Physical Environment</b>  This environment is for the testing of packages (SRPs).</p>	<p>Required SQL DB</p> <p><b>RESTORE:</b> IB_CLIENT security</p> <p><b>RESTORE:</b> RM Rating/Rules</p> <p><b>PURPOSE For setting up this Physical Environment</b>  SQL Server is required for RM and IB_CLIENT. The SQL Server should be on a separate machine. These DBs will connect to the Development environment or the environment that contains RateManager.</p>	<p>Test Rating</p> <p><b>INSTALL:</b> IBFA OBI Publisher</p> <p><b>RUN:</b> Oracle Client</p> <p><b>CREATE SUBSCRIBER</b> Must be the same in all environments</p> <p><b>CREATE:</b> Logical Environments: SR – to identify the location of the local SRPs and the QA IBSR DB.</p> <p><b>CREATE:</b> VFS: To the QA_SR environment on the Development machine</p> <p><b>PURPOSE For setting up this Physical Environment</b>  This environment is for (real-time) production rating. When users send rate requests through the system, this is the environment that will do the rating.</p>	<p>DB for SRPs</p> <p><b>RUN:</b> DDLs</p> <p><b>CREATE:</b> DT table for each LOB:</p> <p><b>CREATE:</b> SR - the IBSR DB for QA</p> <p><b>CREATE:</b> Production - the IBSR DB for Production</p> <p><b>PURPOSE For setting up this Physical Environment</b>  The Oracle DB will hold the SRPs for the QA and Production environment.</p>	<p>Production Rating</p> <p><b>INSTALL:</b> IBFA OBI Publisher</p> <p><b>RUN:</b> Oracle Client</p> <p><b>CREATE SUBSCRIBER</b> Must be the same in all environments</p> <p><b>CREATE:</b> Logical Environments: SR – to identify the location of the local SRPs and the Production IBSR DB.</p> <p><b>CREATE:</b> VFS: To the SR environment on the QA machine</p> <p><b>PURPOSE For setting up this Physical Environment</b>  This environment is for the creation of rating programs and management of the SRPs..</p>

## INSTALLATION OF ORACLE CLIENT

The additional step of running the Oracle Client is described here. This can be performed as Step 10 in the SoftRater Node Installation.

Because many corporate environments have a separation between the system administrator and the database administrator, the following process may require both administrators' access and permissions.

Before proceeding, please have ready:

- The LOBs you want to use.
- Your subscriber ID

---

**NOTE:** *If you do not have database permissions, you will not be able to perform the following database procedures.*

---

---

**NOTE:** *If you are unsure how to perform a database restore, please consult with your database administrator.*

---

1. **Run the Oracle Client.** On the machine where you want to connect an Oracle database. For example, if you want your QA and Production environments to run on an Oracle database, you will need to run the Oracle client on each machine. New folders will be created. Locate file `Insbridge/SoftRater/DDL/Oracle`. The DDLs will need to be moved to your Oracle database or you will need to pass them over to your Oracle DBA. If you are unsure of a what actions you can take, please consult with your database administrator.
2. On your Oracle database, run all **DDLs**.
3. On your Oracle database, you will need to run a DT table for each LOB.
4. After all DT tables have been created, please make note of:
  - Schema
  - Instance
  - User name
  - Password

This information will need to be passed along to the IBRU installer. This information is needed to create a logical environment.

## LOCATION OF DDL DIRECTORY

If a database table needs to be added in SoftRater for Oracle, the DDLs are located in the IBFA Installation Directory under the `SoftRater/DDL` folder. I.e. `[INSTALL_DIR]/Insbridge/SoftRater/DDL`. This information may be needed if you are attempting to add an LOB and receive missing table errors. Creating tables in Oracle should be performed by a qualified DBA.

## ORACLE DATABASE SETUP

Oracle database files are packaged in the install. The **IBSR\_TEMPLATE** file is located in the Databases→Oracle→SoftRater folder. The file name is usp\_IBSR\_v03.12.0.oracle.

---

**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.*

---

These instructions are high level and require that the setup person be a DBA.

1. You will need to **create the database**. Oracle Insurance does not have specific requirements, whatever requirements are deemed necessary by your company's internal standards will work. It is recommended that you included the version number or environment name if you are planning on creating more than one instance.

Have this information ready:

- The LOBs that your company uses. You will need the ID number for each LOB.
  - Your customer number.
  - Location of the Insbridge files.
- a) Create default tablespace for the Soft Rater database.
    - If a database table needs to be added, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDDL folder. I.e. [INSTALL\_DIR]/Insbridge/SoftRater/DDDL. See Location of DDL Directory.
    - You will have to replace the TABLESPACE name in the scripts with the tablespace name you used when you created the database.
    - On the DT tables, you will need to create one for every LOB. An example of the format is in the comments of the script. It requires the LOB ID number and the customer number.
  - b) Create user IBSR and assign basic connect and resource grants.

## Using a DB2 Database

A DB2 database may also be used. To obtain the DB2 client, please visit the IBM website and download the Client for the version you have.

If a database table needs to be added in SoftRater for DB2, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDDL folder. I.e. [INSTALL\_DIR]/Insbridge/SoftRater/DDDL. This information may be needed if you are attempting to add an LOB and receive missing table errors. Creating tables in DB2 should be performed by a qualified DBA.

# SOFTRATER INSTALLATION – JAVA

## A Windows/JAVA/Oracle Database Environment Example:

IBRU Installation/Setup – Windows/JAVA Incorporating an Oracle DB				
Development Windows	SQL	Oracle	QA Java	Production Java
<p>Rating and Rules Authoring</p> <p><b>INSTALL:</b> IBFA RM OBI Publisher</p> <p><b>RUN:</b> Oracle client</p> <p><b>CREATE SUBSCRIBER</b></p> <p><b>ADD DB Connections:</b> Controller Security RM</p> <p><b>CREATE:</b> Logical Environments: RM – to handle testing/rating. QA_SR – This environment contains the full packages to be loaded to the QA DB. Production SR – This environment contains the full packages to be loaded to the Production DB.</p> <p><b>PURPOSE For setting up this Physical Environment</b> This environment is for the creation of rating programs and management of the SRPs..</p>	<p>Required SQL DB</p> <p><b>RESTORE:</b> IB_CLIENT security</p> <p><b>RESTORE:</b> RM Rating/Rules</p> <p><b>PURPOSE For setting up this Physical Environment</b> SQL Server is required for RM and IB_CLIENT. The SQL Server should be on a separate machine. These DBs will connect to the Development environment or the environment that contains RateManager.</p>	<p>DB for SRPs</p> <p><b>RUN:</b> DDLs</p> <p><b>CREATE:</b> DT table for each LOB:</p> <p><b>CREATE:</b> SR - the IBSR DB for QA</p> <p><b>CREATE:</b> Production - the IBSR DB for Production</p> <p><b>PURPOSE For setting up this Physical Environment</b> The Oracle DB will hold the SRPs for the QA and Production environment.</p>	<p>Test Rating</p> <p><b>INSTALL:</b> IBSS</p> <p><b>CREATE:</b> Logical Environments: SR – to identify IBSR DB and location.</p> <p><b>PURPOSE For setting up this Physical Environment</b> This environment is for the testing of packages (SRPs).</p>	<p>Production Rating</p> <p><b>INSTALL:</b> IBSS</p> <p><b>CREATE:</b> Logical Environments: Production – to identify the IBSR DB and location.</p> <p><b>PURPOSE For setting up this Physical Environment</b> This environment is for (real-time) production rating. When users send rate requests through the system, this is the environment that will do the rating.</p>



The Windows/Java environment utilizing an Oracle database example will be displayed by machine and contains 3 application servers and 2 database servers. There are still three environments; development, QA and Production. The Oracle database server will contain two separate databases. Clear and precise naming of the associated databases is recommended.

SoftRater can be run on a non-Windows machine if a compatible application server platform such as WebLogic, WebSphere, or JBoss is running as well. If a non-Windows machine is used for SoftRater, you will need to download a Java version of SoftRater from E-Delivery. The Java version of SoftRater will need to be loaded onto the machine with the compatible application server platform.

The Oracle database can be setup after the subscriber has been created and the lines of business have been selected. You will need this information to complete the Oracle database setup.

## THE SETUP

1. The **Development** environment:
  - a. Contains one Windows application server and one separate SQL Server database.
  - b. RateManager and IBFA/SR-WIN would be located on the same Windows machine. RateManager and IBFA must run on a Windows Server machine.
  - c. OBI Publisher is installed for reports to be created.
  - d. The subscriber ID would be created here.
  - e. On the IBFA/SR-WIN for this environment, three database connections would be created and three logical environments would be created.
  - f. The Oracle client would be run on the Windows machine.
  - g. Two databases would be restored to the SQL Server machine.
2. The **QA** environment:
  - a. Contains one JAVA application server with WebLogic, WebSphere or JBoss installed and running. There is one separate Oracle database server that will be shared between QA and Production.
  - b. IBSS/SR-JAVA would be loaded on the JAVA machine.
  - c. On the IBSS/SR-JAVA for this environment, one logical environment would be created.
  - d. One QA database would be created on the Oracle machine.
3. The **Production** environment:
  - a. Contains one JAVA application server with WebLogic, WebSphere or JBoss installed and running. There is one separate Oracle database server that will be shared between QA and Production.
  - b. IBSS/SR-JAVA would be loaded on the JAVA machine.
  - c. On the IBSS/SR-JAVA for this environment, one logical environment would be created.
  - d. One PRODUCTION database would be created on the Oracle machine.
4. The **Oracle** Server:
  - a. Requires that the Oracle DBA run the DDLs.
  - b. Requires that the Oracle DBA create a DT table for each line of business in each of the two database created. The subscriber ID and line of business number will be required

This is a basic Windows/Java utilizing an Oracle database setup. It is possible to create more than three environments or use fewer than three. There are many combinations of platforms, databases and environments that can be used. Please contact your Insbridge representative for more information on the configuration that you would like to have.

## To INSTALL INSBRIDGE SOFTRATER SERVER

- See Installing SoftRater for WebSphere
- See Installing SoftRater for WebLogic
- See Installing SoftRater for JBoss

## CONFIGURING INSBRIDGE SOFTRATER SERVER

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

<http://SERVERNAME:PORT#/IBSS/>



Figure 60 IBSS Home

---

**NOTE:** *If you have renamed the databases, please make note of the new names.*

---

---

**NOTE:** Your subscriber should have been setup with your RateManager environment.

---

The Environment Setup section allows you to configure rating environments. An environment is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. There is no limit to the number of environments you may have. To navigate to the Environment Setup page, select the Environment Setup link available from the menu tree on the SoftRater page. Required fields will be marked with an asterisk (\*)

Browse to **SoftRater Version 3** → **Environment Setup**.

**\* Environment Setup**

Status:

---

**SELECT ENVIRONMENT** >> Add New Environment <<

Environment Name\*  Company Id\*

Database Server\*  Port\*  Query Block

Database Name\*  Schema name\*\*

Database User Id\*

Database Password\*

Provider Type

Database Type

Data Dir

\* Fields are required.  
\*\* Fields required for an Oracle DB connection.

---

Figure 61 Create a Rating Environment

### To Create/Edit an Environment

1. To create a new environment, use the drop down text box next to **SELECT ENVIRONMENT** and select >> **Add New Environment** <<. If you are editing an existing environment, select the name from the drop down text box. If the page does not automatically refresh, click .
2. When the page refreshes, enter the following information:

### Select Environment;

There are three types of Logical Environments:

- **Development**
- **Quality Assurance**
- **Production**

After you have entered your logical environment, you must define it.

**Database Name:** The name of the database that packages are loaded to.

**Database User Id:** Username to access the database. This information may be obtained from the Oracle DBA.

**Database Password:** Password to access the database. This information may be obtained from the Oracle DBA.

**Provider Type:** The provider of the database. Options are **DB2**, **DB2(AS400)**, **ORACLE** and **MS SQL SERVER**.

**Database Type:** The type of database being accessed. Options are **SoftRater** and **RateManager**.

**Data Dir:** The location of the SoftRater Packages (SRP's).

**Company Id:** Your Company's subscriber ID.

**Port:** Listening port to the target Database Management System.

**Query Block:** (Optional) For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.

**Schema Name:** The name of the schema that defines the structure of the database. This information may be obtained from the Oracle DBA.

3. When you are finished entering information, click **Save**. The environment will be saved and the **Status** field will update.
4. Before you can use the new or edited environment for rating, you will need to reload the configuration XML file. This is done by resetting the environments.

For more information on working with IBSS, please see the IBSS User Guide.

## UPDATING AN INSBRIDGE APPLICATION

An update to the system can be run from the same installer. Unzip the IBRU folder on the machine where the IBRU system (IBFA and RateManager) is currently installed. Click the installer.

During the installation, the installation program requires the installer have administrator rights on the machine where the install is occurring. Please close all open applications and run the Oracle Insurance – Insbridge Rating and Underwriting file.

A Welcome screen will be displayed.

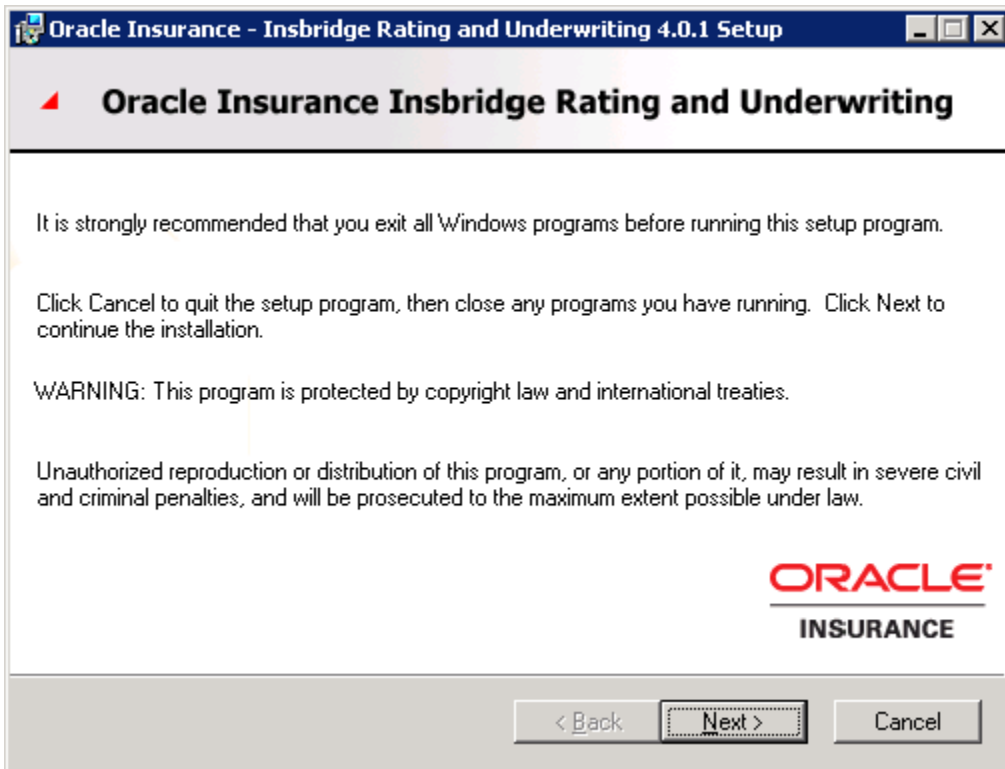


Figure 62 Installing Insbridge

1. Click on **Next** to continue. The destination path will be displayed next. This is an information only screen. No changes will be allowed.

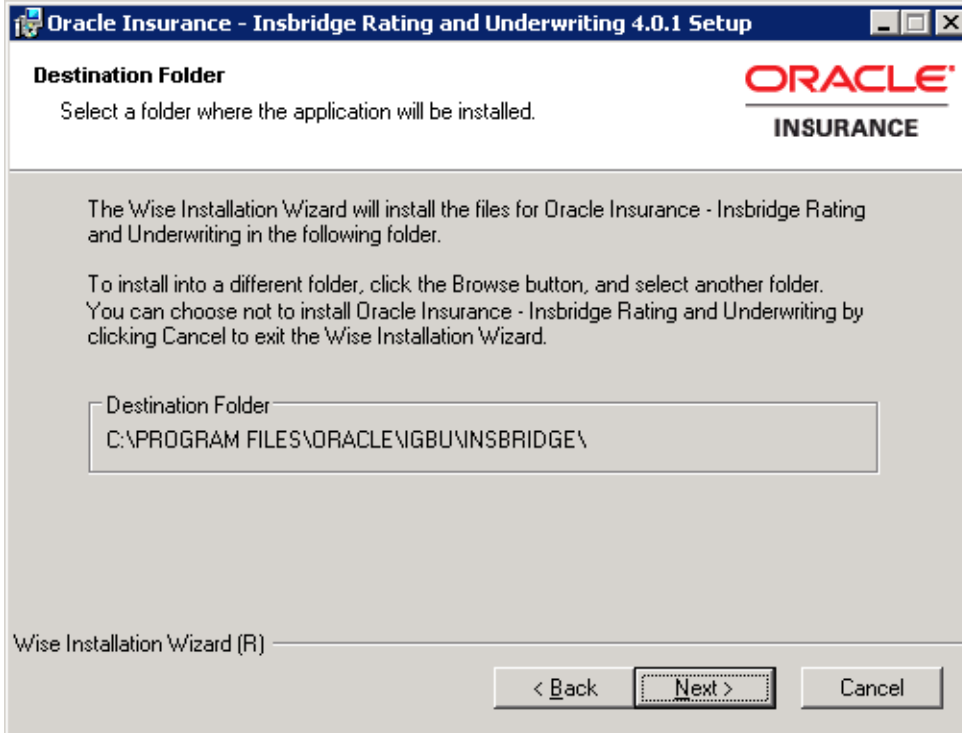


Figure 63 Destination Location for Update

2. The next screen is the Logon Information screen. Please use the Insbridge user account information that you set up earlier.

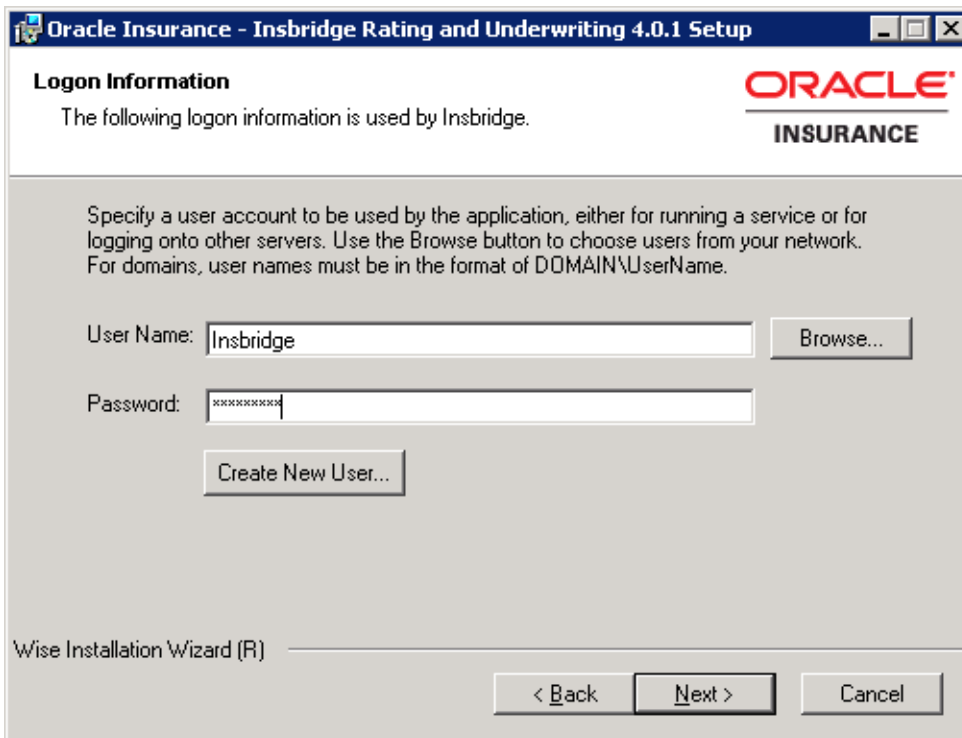
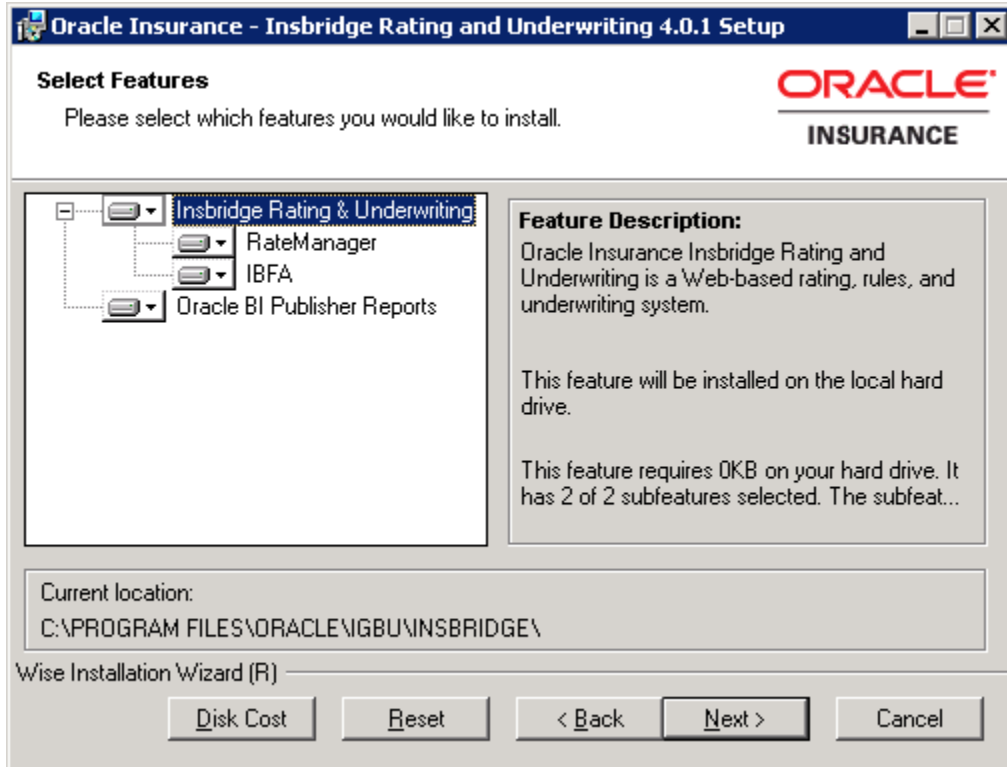
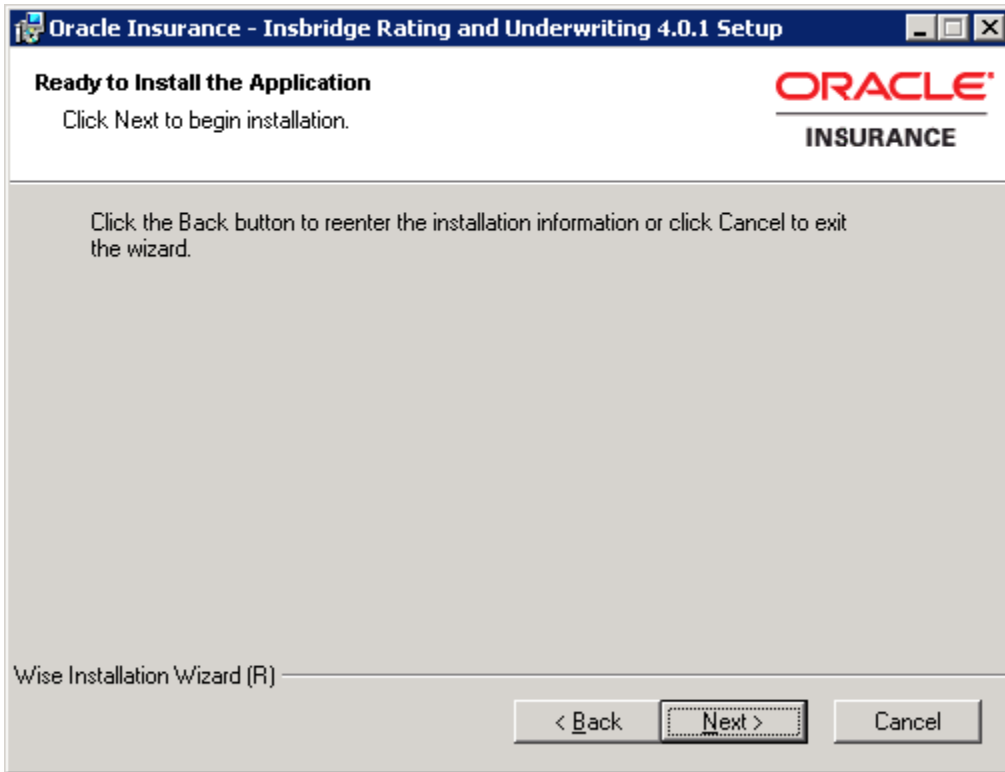


Figure 64 Entering User Information for Insbridge

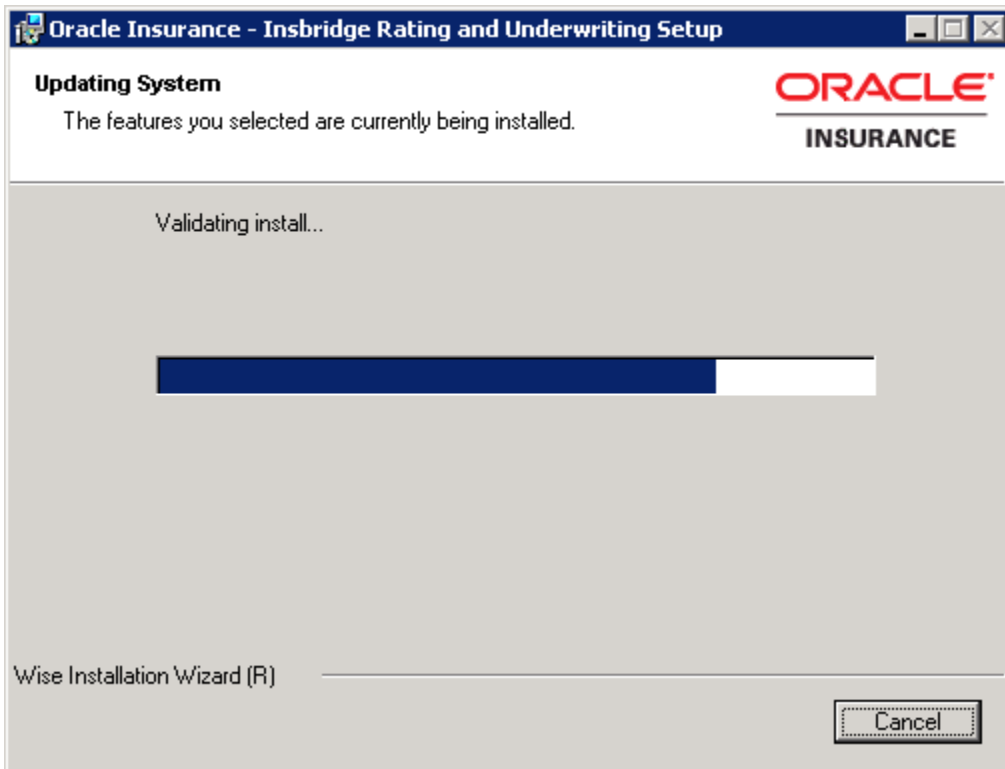
3. Click **Next** to continue.
4. The next screen will list the applications to be installed. To expand the options and view details, click on the downward arrow. All features are checked for installation. RateManager is the only one that you will be allowed to not install.



5. Click **Next** to continue.

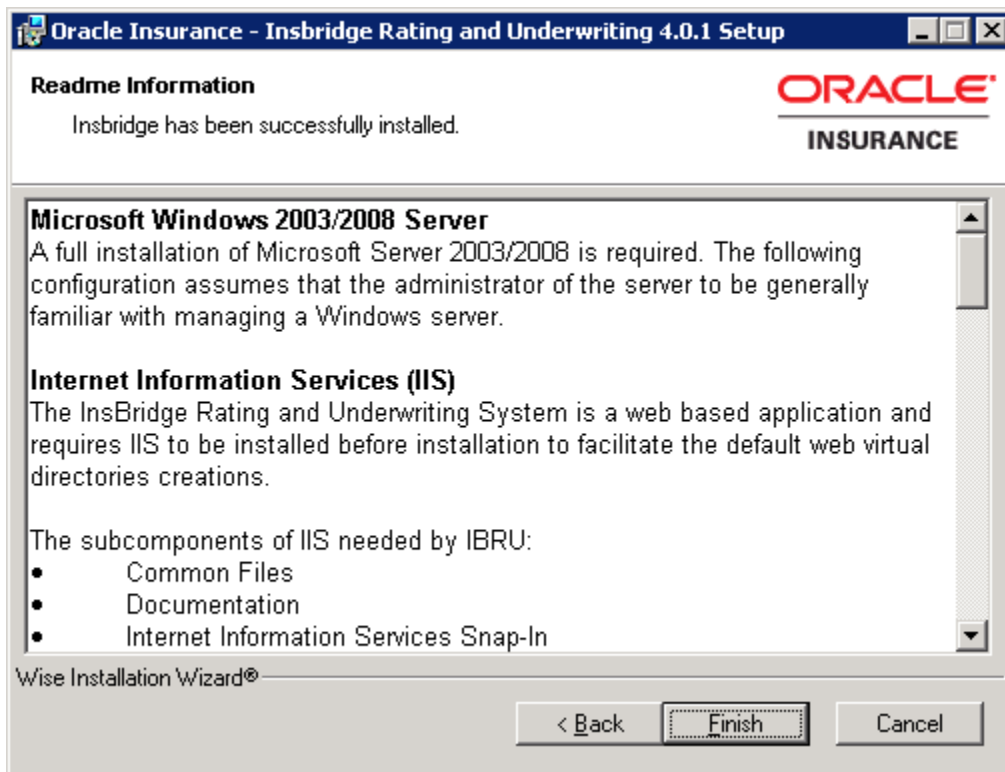


6. A Ready to Install screen will be displayed. If you are ready, click **Next**. Otherwise click Back to check the options you want to install. A progress screen will display your progress.





7. When complete, a ReadMe Information screen will be displayed.



8. Click **Finish**.

---

**NOTE:** Any Insbridge services will be stopped during the update.

---

## UPDATING DATABASES

Database updates can be performed in RateManager for the IBRM and IB\_Client databases. This is the recommended way to update these databases. The SoftRater database will need to be updated manually on the machine where it is located.

To update the RM and IB\_Client databases, log into RateManager.

---

**NOTE:** If you need to go from an older version, such as 3.9, you will have to enter RateManager and run the IBRM and IB\_CLIENT update scripts in sequential order from there. You must be a DB Owner to run the update scripts in RateManager.

---

---

**NOTE:** SoftRater update scripts must be run manually. See Manual Updates to the IBRU Databases for more information.

---

## UPDATING AN ORACLE DATABASE

On the Windows machine that hosts the Oracle database connection, run the Oracle Client.exe.

Select your company name underneath Config on the left hand side to enter the configuration information for the environment you want to update.

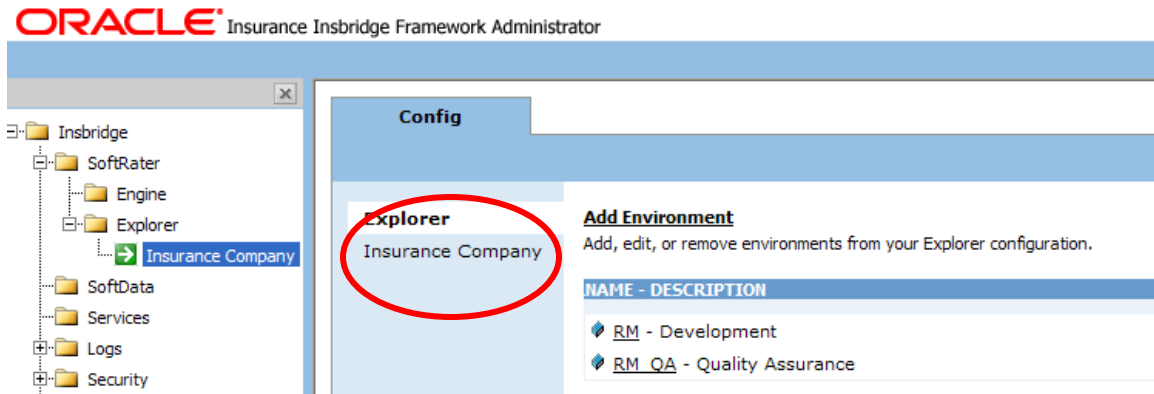


Figure 65 Obtaining Environment Information

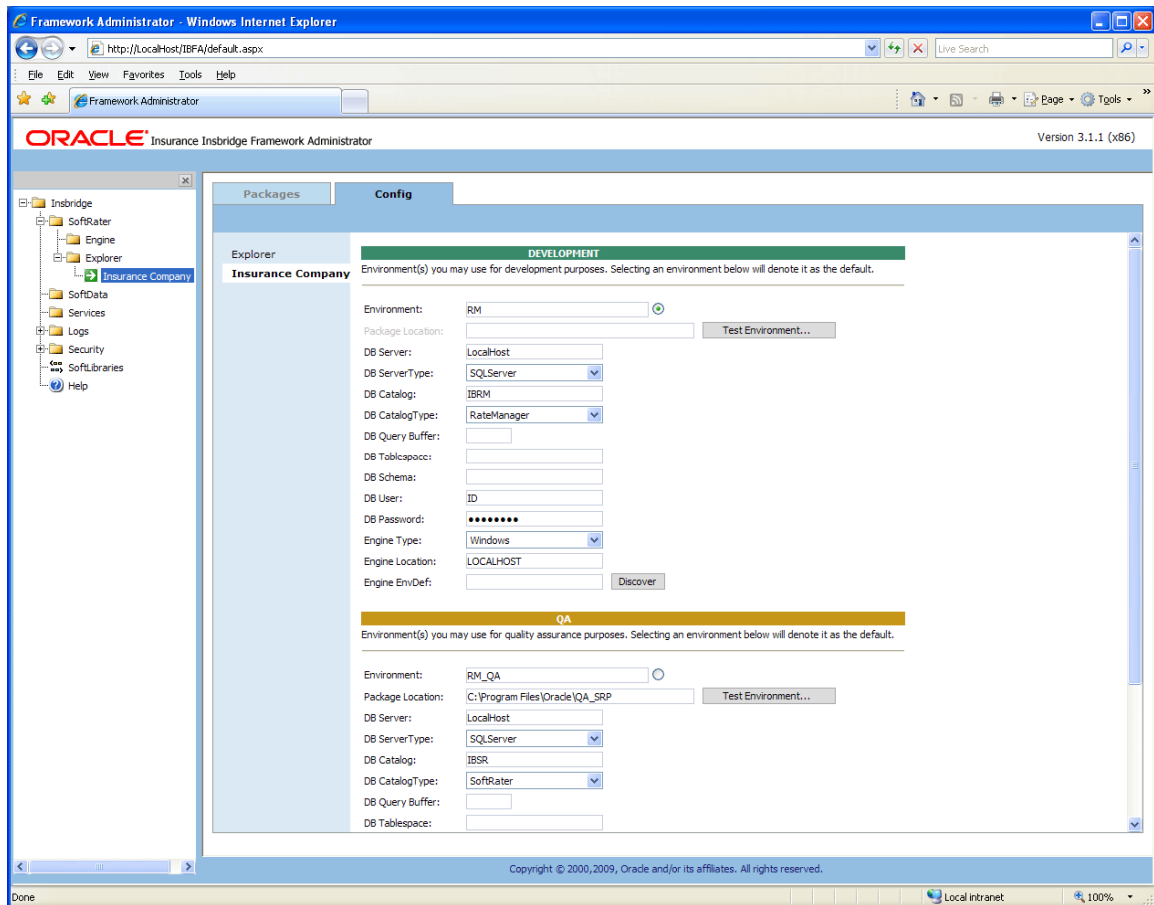


Figure 66 Editing Environment

Only the information required for this connection is: Environment, DB Server, DB Server Type, DB Catalog, DB Catalog Type, DB Schema, DB User, DB Password, Engine Type and Engine Location. The Package Location, DB Query Buffer, DB Tablespace and Engine EnvDef can remain blank or filled out as needed.

For each environment, you can set up the following information:

Previous Value	Updated Value
<p><b>Environment:</b> The name of the environment. Selecting the radio button next to an environment's name will set it up as the default environment.</p>	<p>No change.</p>
<p><b>Package Location:</b> Physical location of where the packages should be stored. Click Test Environment to run a process to validate the permissions on the directory and certify any packages in the directory. In order for the Framework Administrator to successfully manipulate packages in the location, it must have full control of the directory.</p>	<p>No Change.</p>
<p><b>DB Server:</b> The name of the server that houses the database that packages will be loaded to.</p>	<p><b>DB Server:</b> The name of the server that houses the database that packages will be loaded to. For DB2 servers, this is the DB2 Registered Alias Name. For Oracle servers, this is the server name; either IP or DNS will work. The Database listener port number will also need to be appended to the server name if it is something other than the default port.</p> <p>The format for this is as follows: [SERVER NAME]:[PORT NUMBER]</p>
<p><b>DB Server Type:</b> The type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2.</p>	<p>No Change.</p>
<p><b>DB Catalog:</b> The name of the catalog in the database. Not required for SQL Server.</p>	<p><b>DB Catalog:</b> The name of the catalog in the database. For DB2 servers, this is the System DSN Name. For Oracle servers, this is the instance.</p>
<p><b>DB Catalog Type:</b> The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater.</p>	<p><b>DB Catalog Type:</b> The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.</p>

Previous Value	Updated Value
<b>*DB Query Buffer:</b> For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.	No Change.
<b>*DB Tablespace:</b> The name of the table space in the database.	No longer required.
<b>*DB Schema:</b> The name of the schema that defines the structure of the database.	<b>*DB Schema:</b> The name of the schema that defines the structure of the database. This information may be obtained from the Oracle DBA.
<b>DB User:</b> Username to access the database.	<b>DB User:</b> Username to access the database. This information may be obtained from the Oracle DBA.
<b>DB Password:</b> Password to access the database.	<b>DB Password:</b> Password to access the database. This information may be obtained from the Oracle DBA.
<b>Engine Type:</b> The type of SoftRater engine that is used. The available options are: SoftRater for Windows, SoftRater for WebSphere, SoftRater for WebLogic, or SoftRater for JBoss.	No Change.
<b>Engine Location:</b> The location of the SoftRater engine. If the engine is local to the Framework Administrator (i.e. located on the same server), leave this field as LOCALHOST. If the engine is located on a different server, enter the name in the box.	No Change.
<b>Engine EnvDef:</b> This field should remain blank, unless the engine is located on a different server. If the Engine Location is set to LOCALHOST, leave this field blank. If the Engine Location is not LOCALHOST, this should match the name of the environment on the remote server.	No Change.

---

**NOTE:** *If you are using an Oracle or DB2 server, the options and requirement will be different. Please see the Insbridge IBFA User Manual (Located in the User Guides directory) for more information.*

---

## WORKING WITH RATEMANAGER FOR THE FIRST TIME

The URL for RateManager will be <http://INSTALLATIONSERVERNAME/RM>. Where Installation server is the server where RateManager was installed.

This will place you on the RateManager login screen.

1. To login for the first time, select your company from the drop down menu.
2. The user name will be demo.
3. The password will be password.

To change your password, go to Administration➤Change Password.

For more on user management, please see the RateManager User Guide.

---

**NOTE:** *If you log into RateManager and Tools is the only option, you must perform a database update.*

---

---

**NOTE:** *If you are having difficulties logging into RateManager, please check the error logs in IBFA.*

---

## RUNNING DATABASE UPDATES IN RATEMANAGER

If you log into RateManager and Tools is the only option, you must perform a database update. After you perform the database updates, to view all menu options, click File→Reload.

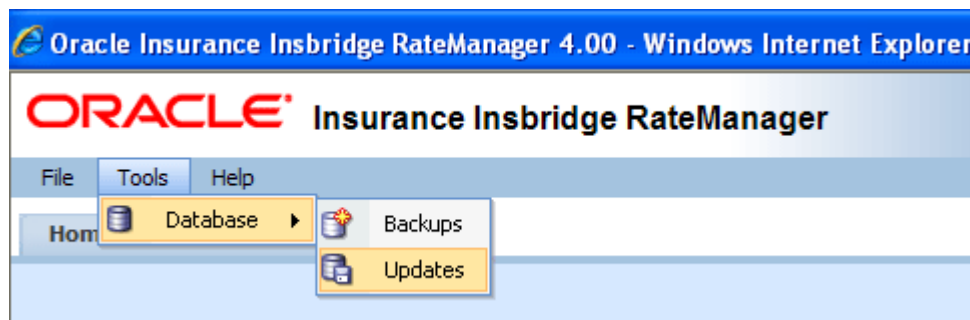


Figure 67 Tool Mandatory Update

On the DB Updates screen, the current version will be highlighted and the status will be *Current*. The updates below the current version will be grayed out. These updates cannot be run again. You will receive an error message if you attempt to run a lower version update. Any version update above the current version will also be grayed out but will be available for executing.

Updates have to be installed sequentially, meaning if you are on Version 3.9, you must run the 3.10 update, then the 3.11 update, the 3.12 update, the 3.13 update and finally the 4.0.1 update. If you attempt to run an update that is more than one level above the current version, you will receive an error message.

1. Navigate to the **Tools→Database→Updates**.
2. Select the database you want to view from the **Show updates for** drop down. The database updates will be listed. The last column, the **Status** column, will show you which update is the **Current** one installed.

**ORACLE Insurance Insbridge RateManager**

File Modules Tools Help

Home DB Updates

**DB Updates**

Execute Update Script Open Update Script Save Update Script to File Refresh

Show updates for: IBRM

Script	Release Date	Database	Status
v04.00.1.00	6/15/2010	IBRM	
v04.00.0.00	3/10/2010	IBRM	
v03.13.0.00	12/15/2009	IBRM	Current
v03.12.0.00	4/30/2009	IBRM	
v03.11.0.00	11/30/2008	IBRM	
v03.10.0.00	8/31/2008	IBRM	
v03.9.0.00	5/19/2008	IBRM	
v03.8.0.00	6/7/2007	IBRM	
v03.7.0.00	7/28/2006	IBRM	

Figure 68 Available Updates

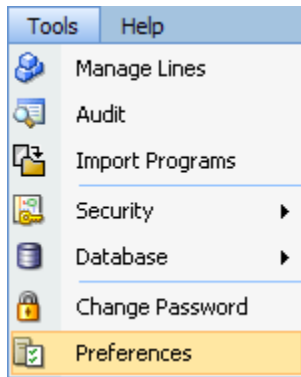
3. There are two ways to execute an update:
  - a. **Directly in RateManager: This is recommended way to update a database.**
    - i. Highlight the update you want to run. Begin with the lowest update. For example, if you are going from version 3.9, you must run the version 3.10 update first and so on. Click **Execute Update Script**. A warning message will be displayed.
    - ii. Click **OK** to run the update or **Cancel** to return to the previous screen.
    - iii. Do this for both the IBRM database and the IB\_CLIENT database.
    - iv. Close the **DB Updates** tab.
    - v. If the screen does not refresh, you can either log out and log back in or click **File→Reload**. This will refresh the screen.
  - b. **Use Query Analyzer:** This method should be performed by a database administrator. No warning message will be displayed if you execute scripts in the wrong order. You must know the name of the databases you are updating. Please see **Manual Updates to the IBRU Database**.

## UPDATING PREFERENCES

Administrators can edit web settings at any time from the Preferences option in RateManager. Changes will take place after the user sessions have been ended. If web settings are changed while the users are inside the module, the change will not be visible to them. Prior to users accessing RateManager for the first time, it is recommended that Preferences be set.

### To Change Settings

1. Select Tools→Preferences.



2. This will open the **Preferences** window. Select **Web Settings**.

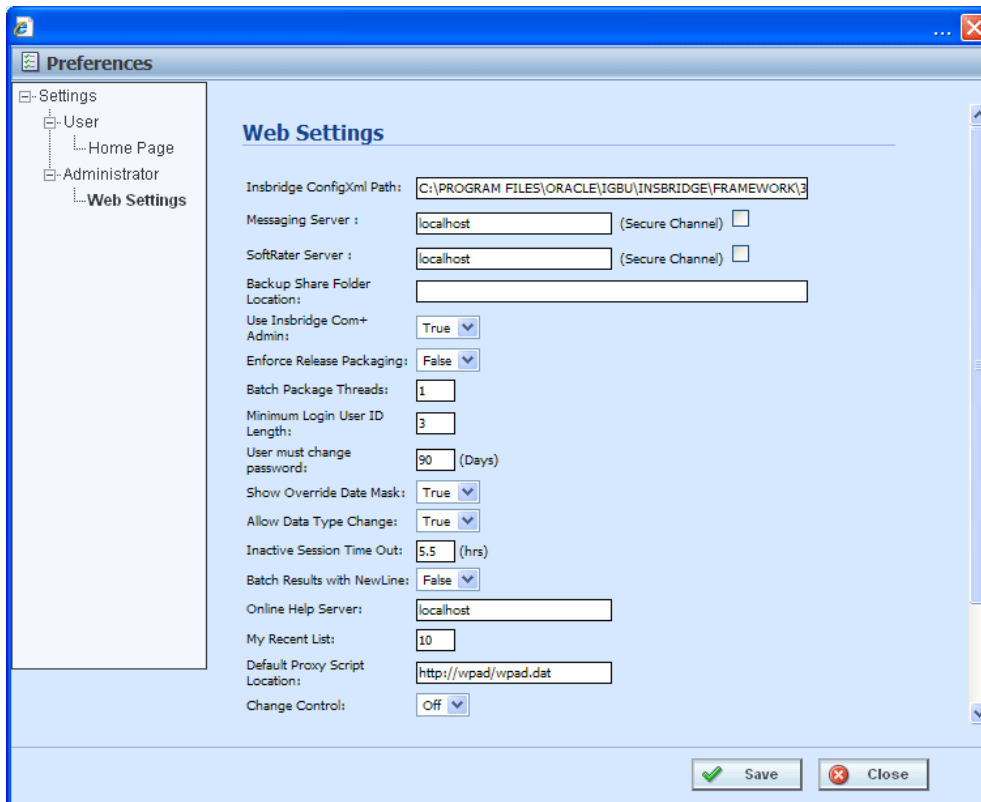


Figure 69 Preferences Settings

3. Make any necessary changes. If you do not know all the settings, you can come back and edit later at a later time. It is recommended that you update the **ONLINE HELP Server** immediately.
4. When you are finished, click **SAVE** to update your settings.

## Web Settings

### Insbridge ConfigXml Path

This is the path from IBFA. This pathway must match the IBFA path. You may need to change this path if you have changed the path in IBFA. Please contact Insbridge support for further information. It is strongly recommended that you leave the default.

### Messaging Server

RateManager is set up to run batches on the same server that RateManager is located on. If you have an especially large batch to run and you want to batch to a different server, you will have to change server locations here. Unless necessary, it is strongly recommended that you leave the default.

### SoftRater Server

If you need to rate on another server, you will have to change server locations here. It is strongly recommended that you leave the default.

### Backup Share Folder Location

When you make backups of the RateManager database, you can specify the location of the backup file. If the location is local, you will use a local path. If the location is not local, you must be a disk admin to change.

### Use Insbridge Com + Admin

This setting must always be true. If there is a conflict, please contact Oracle Insurance support.

### Enforce Release Packaging

When set to **False**, a release is not required in order for users to create a SoftRater (full) package. False is the default setting.

If set to **True**, a release is required in order for a SoftRater (full) package to be created. If a user wants to create a SoftRater (full) package in the Program Explorer module, a release must be created in the Releases area first. This release must have the program added to it and be unlocked. When the user creates the SoftRater package in Program Explorer, they will have the option to select the Release they want this package to be placed into. If there is no release, or no release that contains that program and is unlocked, then the user will be able to do RateManager (local) packages only.



## Batch Package Threads

RateManager allows you to change how many threads are used. Threading enables a process to finish faster by splitting the process into smaller processes that run quasi-simultaneously. On multiprocessor systems, using multiple threads enables the operating system to assign the threads to different processors.

In addition, the Framework Administrator also enables you to change the administrator email address for each client. When a process fails, an email will be sent to the person who initiated the process, as well as to the administrator email addresses listed for the client of that process.

---

**NOTE:** *Before changing the number of threads, you should consult with your system administrator. Setting the number too high can result in poor performance or even a system crash. If you are unsure of how many threads to use, set the number to 1. For single processor systems, Oracle Insurance recommends a maximum of 2 threads.*

---

## Minimum Login User ID Length

This is the minimum number of characters required for a user ID.

## User must change password

This where you set the number of days before a user is required to change his/her password. This setting will only be active when you elect to have users change their password on the user setup screen.

## Show Override Date Mask

If enabled, a date mask for 'Date' data types will be displayed when importing a table. If not enabled, this field will not be visible.

## Allow Data Type Change

The type of data associated with a parameter. RateManager supports three (decimal, integer and string) data types for variables and inputs and a fourth (date) for inputs and result variables only.

Setting this option to True will allow RateManager users change the data type of a variable or input. Setting this option to False will not allow users to change data types.

## Inactive Session Time Out

This is the amount of time that a user sits inactive before being automatically logged out of the system.

## Batch Results with New Line

Allows batch results to go to a new line instead of forming one continuous string. A True setting will place a carriage return between result files. A False setting will result in one continuous string without a break.

## **Online Help Server**

Online help is installed with RateManager. This setting should be the server name where RateManager currently resides. Either a server name or an IP address can be entered here. If needed, you can change the name of the server. For example, if the machine name is not the same as the host name, you may need to change the name in order for online help to function.

## **Change Control**

If change control is on, it will be mandatory for users to enter a change control entry and justification to any element or program when it is revisioned. If change control is off, the option will not be presented.

# MANUAL UPDATES TO THE IBRU DATABASES

In the RateManager, Security, and SoftRater Database folders you will find the current database scripts. The RateManager and Security database update scripts will take previous IBRM and IB\_CLIENT databases from **version 3.13 to version 4.0.1 only. To go from a lower version up to 4.0.1, you must enter RateManager.**

The IBSR database update will need to be run once, regardless of version, in the corresponding database. If you are updating from a release previous to 3.13, please see UPGRADE NOTICE on page 116.

---

**NOTE:** *Oracle database updates must be performed directly on the Oracle database by an Oracle DBA. Improper scripts updates can result in database failures. Oracle database updates are not available on RateManager.*

---

## TO PERFORM DATABASE UPDATES FROM RATEMANAGER

The preferred method of updating the IBRM and IB\_CLIENT databases is to go into RateManager. If the administrator has DB User privileges and is the DB Owner of the database as well as the disk administrator, database updates can be done on the **Tools→Database→Updates** tab. If these privileges are not in place, an error message will be displayed. See Running Database Updates in RateManager for instructions.

---

**NOTE:** *If you need to go from an older version, such as 3.9, it is strongly recommended that you enter RateManager and run the 3.10, 3.11, 3.12, 3.13 and 4.0.1 update scripts successively from there.*

---

To manually update a SQL Server database, you will be required to save off each update and run them in sequential order in SQL Server. A DBA or a person with the proper permissions will need to apply the database updates using Query Analyzer.

1. In RateManager, highlight the update you want to run. If you are going from a much lower version of RateManager, you may have to save multiple files for each database.
2. Click **Save Update Script to File**. Your computers dialogue box will be displayed. **Save** the file to a location of your choice. For IBRM scripts, it is recommended that you rename the file to usp\_IBRM\_R0(version number).sql. For example the V3.10 update would be: usp\_IBRM\_R0310.00.sql. For IB\_CLIENT scripts, it is recommended that you rename the file to usp\_IB\_CLIENT\_R0(version number).sql. For example the V3.10 update would be: usp\_IB\_CLIENT\_R0310.00.sql.
3. To view the update script prior to execution, highlight the update you want to view. Click **Open Update Script**. The update script will be displayed in a separate screen.



Figure 70 Script Viewer

4. If this is the script you want to run, open **Query Analyzer** in SQL Server.

---

**NOTE:** *If you do not have database permissions, you will not be able to perform the following database queries.*

---



---

**NOTE:** *When using Database Engine Query, the SQL scripts must run on each individual database.*

---

5. **Open up the DB script updates** from the download file. You can open in any program you want, such as Notepad. Begin with the next sequential update. For example, if you are going from V3.9 to 4.0.1, open 3.10 first.

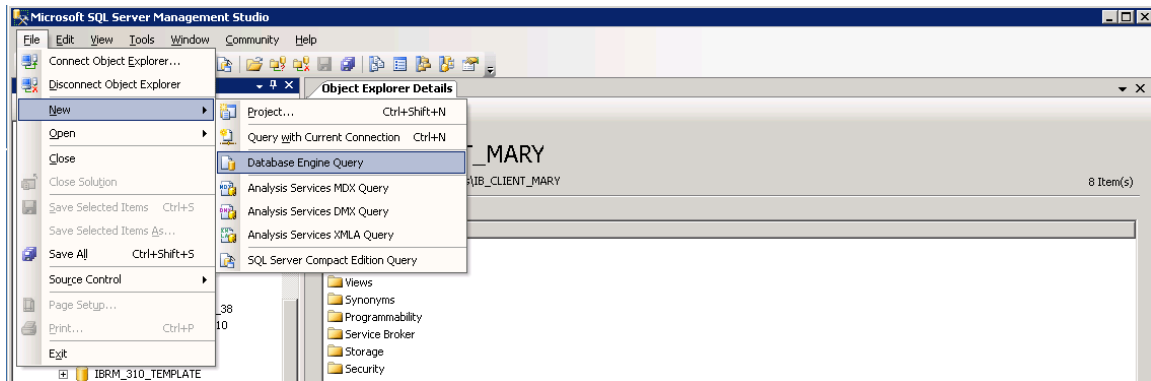


Figure 71 Updating Database

6. Select the database you want. In SQL Server Management Studio, create a new Database Engine Query, **File→New→Database Engine Query**.
7. The query screen will be displayed on the right hand side.
8. Copy the first update from Notepad and paste onto the query screen.
9. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen. You must run the updates in sequential order. Run each update until you run the 4.0.1 update. Then continue on to the next database.
10. For example, if you want to update the IBRM database in SQL Server, select the IBRM\_ database. In SQL Server Management Studio, create a new Database Engine Query, **File→New→Database Engine Query**.
11. The query screen will be displayed on the right hand side.
12. Copy the first update from Notepad and paste onto the query screen.
13. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen. Run each update until you run the 4.0.1 update. Then continue on to the next database.
14. For example, if you want to update the IB\_CLIENT database in SQL Server, select the IB\_CLIENT database. In SQL Server Management Studio, create a new Database Engine Query, **File→New→Database Engine Query**.
15. The query screen will be displayed on the right hand side.
16. Copy the first update from Notepad and paste onto the query screen.
17. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen. Run each update until you run the 4.0.1 update. Then continue on to the next database.
18. After the scripts have been run, return to RateManager. Click **Refresh Listing**. The status should show current and the full RateManager menu should be displayed

The updates are now properly applied and users can log back in to the system.

## UPDATING THE SOFTRATER DATABASE FROM A LOWER VERSION

**For SQL Server Only:** The only upgrade needed to perform for SoftRater is adding the new stored procedures on all of the IBSR databases. This can be accomplished by opening Query Analyzer and connecting to the IBSR database. Then run the included SQL script `usp_IBSR_v03.13.00sql` available in the install download.

**For an Oracle Database:** Run the corresponding Oracle file.

## WINDOWS 2003 SETTINGS AND PERMISSION NOTES

### Microsoft .NET Framework

It is suggested that the Microsoft .NET Framework version 3.5 be installed prior to the Insbridge Rating and Underwriting System install. .NET Framework version 3.5 can be obtained from Microsoft's website or from using Microsoft's Windows Update.

We also highly recommend installing the .NET Framework after installing IIS in order to update all the web applications to utilize the ASPNET system.

This can be doubled checked by:

1. Open **Internet Service Manager** and right click the **Default Web Site**.
2. Select **Properties**.
3. Select the **Home Directory** tab.
4. Click **Configuration...**
5. Scroll until you find the **ASPNET extensions** (.asax, aspx, .asmx, etc.).
6. To get a detailed look, select an extension and click **Edit**.

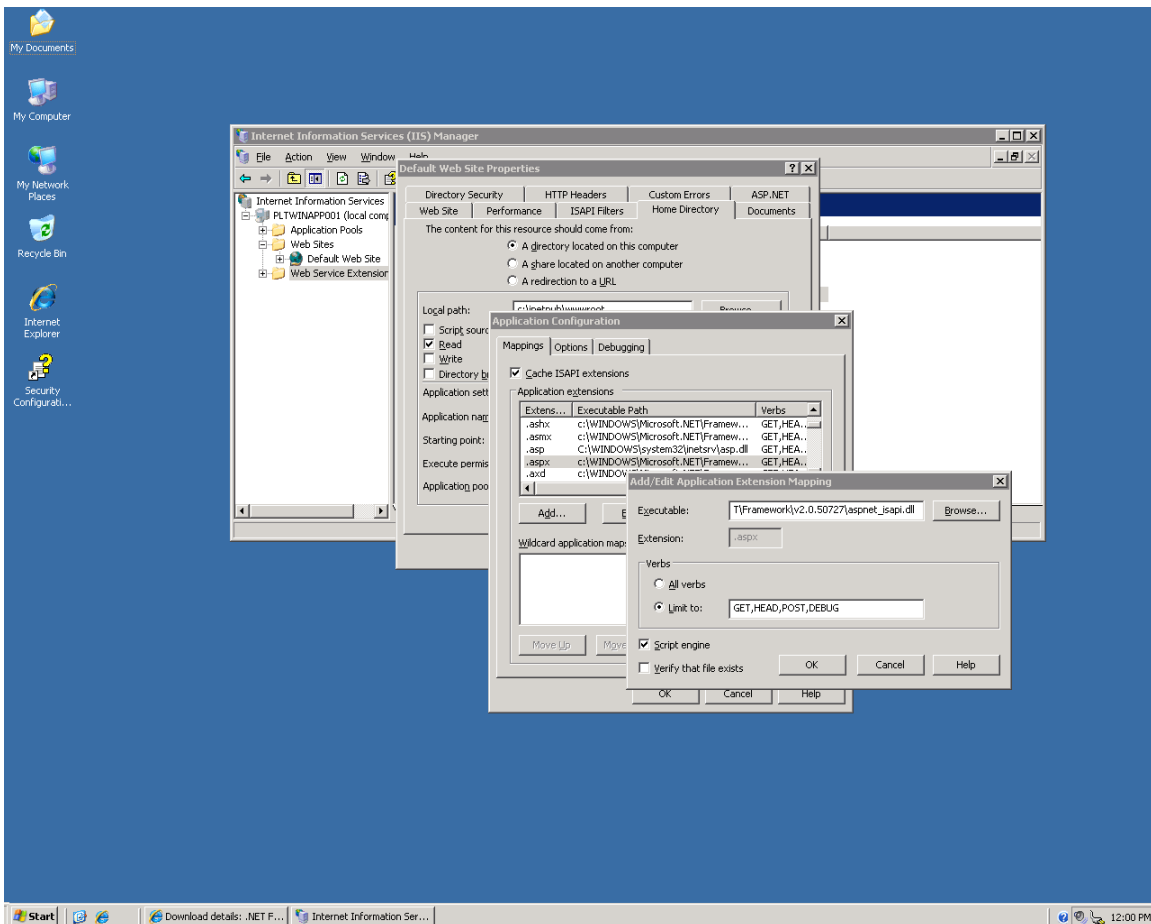


Figure 72 Installing .NET Framework

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.

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
```

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.

Please see page 18 in regards to the permissions required by the local ASPNET user account.

## Internet Information Services (IIS) 6.0

The Insbridge Rating and Underwriting System is a web based application and requires IIS to be installed before the Insbridge Rating and Underwriting System installation to facilitate the default web virtual directories creations.

The subcomponents of Application Server needed by the Insbridge Rating and Underwriting System:

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

**After installing IIS and .NET 3.5, Active Server Pages and ASP.NET v2.0.xxxx must be enabled in order for the IBRU applications to work.**

1. Open Internet Information Services (IIS) Manager in the administration tools.
2. Select the Web Service Extensions on the left hand side and make sure they are **Allowed** as shown below:



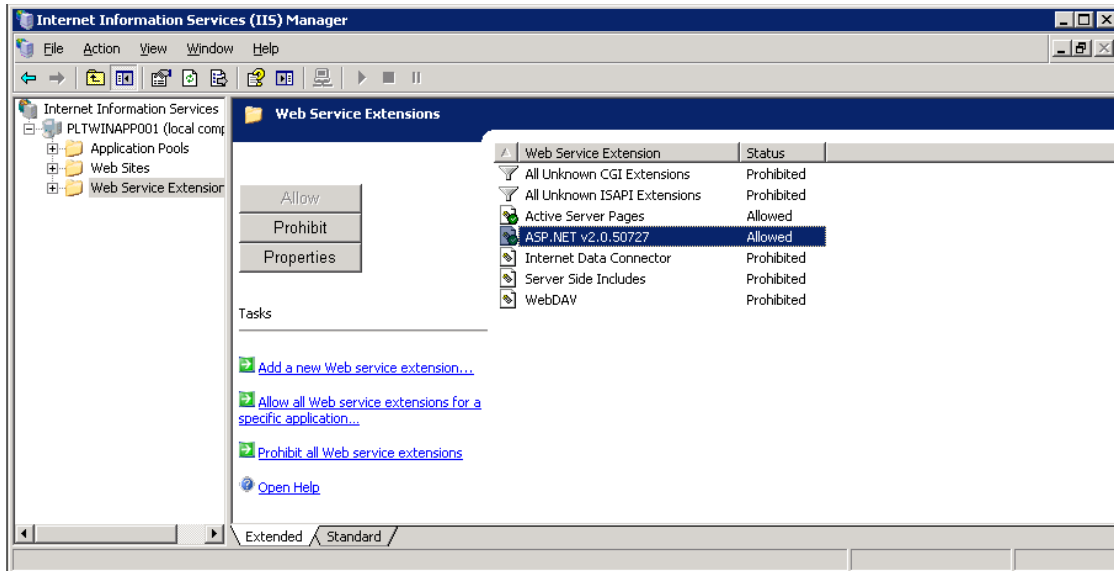


Figure 73 Enabling Active Server Pages and ASP.NET v2.0

## Message Queuing Services

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

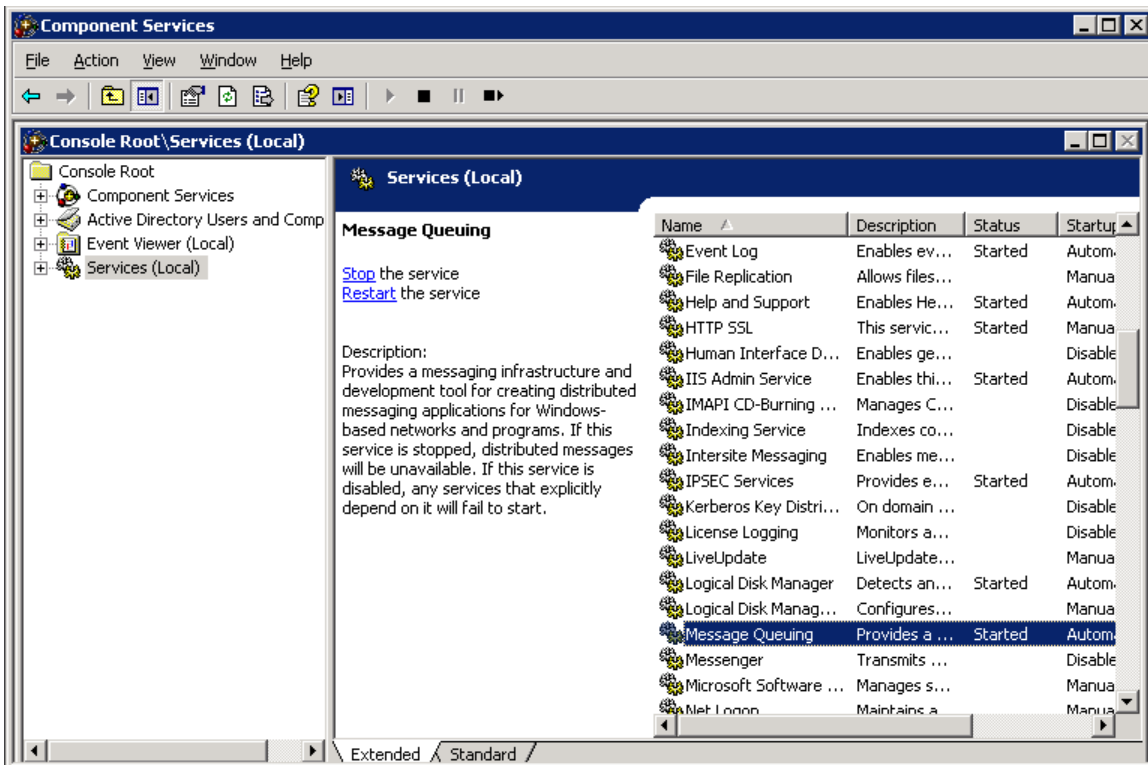


Figure 74 Message Queuing Type

## Installing Java Runtime Environment for PDF creation

In order to create reports as PDF files from the RateManager web interface, the Java Runtime Environment version 1.4 or above must be installed on the web server. The JRE can be downloaded from the <http://java.com/en/download/manual.jsp>.

## MDAC 2.8

If the Insbridge Rating and Underwriting application 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. MDAC version 2.8 is included with Windows Server 2003.

## Special Considerations for Windows Server 2003

Microsoft has identified some known issues with Windows Server 2003. Oracle Insurance is aware that these issues may surface during the installation of Insbridge Rating and Underwriting System, depending upon your network setup and choice of operating system. Oracle Insurance offers the following solutions for known issues. Please discuss and involve your System Administration Group or IT Department prior to making any change. The suggestions listed below will allow the Insbridge Rating and Underwriting System to function in most environments. Oracle Insurance makes no claim to knowing what effects these changes may have on other areas of your network.

Prior to making any changes, please consult with your System Administration Group or IT Department and Insbridge support.

### FIPS Encryption

**PROBLEM:** A Windows Server 2003 server with an encryption level set to FIPS Compliant will not allow Remote Assistance connections from a Windows XP box. When you try to connect, you will receive an error message.

**SUGGESTED SOLUTION:** Disable the FIPS encryption.

There are two ways to enable the FIPS encryption level. If you have to disable the FIPS encryption level for Terminal Services, you must do this by using the same method that you originally used to enable the FIPS encryption level. <sup>1</sup>

#### Method 1

To disable the FIPS encryption level by changing the **Encryption level** setting in the **RDP-Tcp Properties** dialog box, follow these steps:

1. Click **Start**, click **Run**, type **tscc.msc** in the **Open** box, and then click **OK**.
2. Click **Connections**, and then double-click **RDP-Tcp** in the right pane.

---

<sup>1</sup> From Microsoft Knowledge Base Article #811770.

3. In the **Encryption level** box, click to select a level of encryption other than **FIPS Compliant**.

**Note** If the **Encryption level** setting is disabled when you try to change it, the system-wide setting for **System cryptography: Use FIPS compliant algorithms for encryption, hashing, and signing** has been enabled, and you must disable this system-wide setting by using method 2.

## Method 2

To use the Group Policy Object to disable FIPS data encryption system-wide, follow these steps:

1. Click **Start**, click **Run**, type **gpedit.msc** in the **Open** box, and then click **OK**.
2. Expand **Computer Configuration**, expand **Windows Settings**, expand **Security Settings**, expand **Local Policies**, and then click **Security Options**.
3. In the right pane, double-click **System cryptography: Use FIPS compliant algorithms for encryption, hashing, and signing**, click **Disable**, and then click **OK**.

**Note** Encryption level settings in Terminal Server are unavailable when FIPS is enabled.

For more information, please visit <http://support.microsoft.com/kb/811770>.

## Distributed Transaction Coordinator (DTC)

**PROBLEM:** Network DTC access is disabled by default in Windows Server 2003 server. If network DTC access is not enabled, applications can only use transactions that are located on the same box. If you want a client to access the server, you will receive an error message.

**SUGGESTED SOLUTION:** Enable DTC Access.

Please note that you must restart the server. <sup>2</sup>

### Steps to enable network DTC access

1. Click Start, point to Control Panel, and then click Add or Remove Programs.
2. Click Add/Remove Windows Components.
3. Select Application Server, and then click Details.
4. Select Enable network DTC access, and then click OK.
5. Click Next.
6. Click Finish.
7. Restart the computer.

If you are running Windows Server 2003 SP1, there are additional steps that must be taken. Please see <http://support.microsoft.com/kb/817064/en-us> for more information.

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<sup>2</sup> From Microsoft Knowledge Base Article #817064.

## NOTICE

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# UPGRADE NOTICE

This notice is for customers currently running a SoftRater for Java engine Release 3.12 or lower. This includes:

- **SoftRater for WebLogic**
- **SoftRater for WebSphere**
- **SoftRater for JBoss**

Necessary updates have been made to the SoftRater for Java engines. This includes:

- **SoftRater for WebSphere has been updated to SOAP version 1.1.**
- **SoftRater for WebLogic has been updated to SOAP version 1.2.**
- **SoftRater for JBoss has been updated to SOAP version 1.2.**

These changes mean that the WSDLs for the SoftRater for Java engines have been modified. Updated WSDL documents will need to be incorporated into any client calling application that communicates with SoftRater. If upgrades are done to the SoftRater for Java engines without updating the calling applications, the calling application will fail.

**Please update a test environment prior to deploying to production.** Install the .EAR file in a test environment to obtain the WSDL. Update your calling application and then test. When testing is complete, you can upgrade your other environments.

---

**NOTE:** *Customers running a Windows only environment, without a Java component, will not be affected.*

---

These updates are for the 3.13.5 and 4.0.1 release of SoftRater for Java engines only.

## **CONTACTING SUPPORT**

If you need assistance with an Oracle Insurance Insbridge Rating and Underwriting System product, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.

### **Address any additional inquiries to:**

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

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200  
oracle.com

## **TTY ACCESS TO ORACLE SUPPORT SERVICES**

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

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