ORACLE
INSURANCE

Oracle Insurance

Insbridge Rating and Underwriting

Planning an Insbridge Environment Guide

Release 4.0.1

August 2010

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Oracle Insurance Insbridge Rating and Underwriting Planning an Insbridge Environment Guide

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PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting Planning an Insbridge Environment Guide.* The Insbridge Rating and Underwriting (IBRU) system is a web-based application with a database backend that can be configured to utilize many different and complex configurations. This guide will assist with the planning of your IBRU 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.

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Rating and Underwriting Operating Environments for Hardware and Software.
- You can view this guide on-line at this address:

  http://www.oracle.com/technology/documentation/insurance.html

SYSTEM REQUIREMENTS

For minimum operating system and hardware requirements, please see the Oracle Insurance Insbridge Rating and Underwriting Operating Environments for Hardware and Software guide.

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-781-01	V 3.13	December 2009	Initial Release
2nd Edition	P01-781-02	R 4.0	April 2010	Update Release
3rd Edition	P01-781-03	R 4.0.1	August 2010	Update Release

Chapter 1

PLANNING YOUR IBRU SYSTEM

Prior to installation, you should have an idea of the type of setup you want to create. If you do not have everything completely planned out, you can still proceed. Environments and machines 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.

QUESTIONS TO ASK

These questions may help you decide the type of setup you need.

What type of database do you want to utilize for rating? SQL, Oracle or DB2?

What application platform do you want to utilize for rating? Windows, WebLogic, WebSphere or JBoss?

How many physical environments do you need?

How many logical environments do you need?

What is the business process that you need to follow? Who will be creating programs? Who will be testing?

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.

Chapter 2

ENVIRONMENTS

There are a few different kinds of environments in the IBRU system.

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 programs. 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

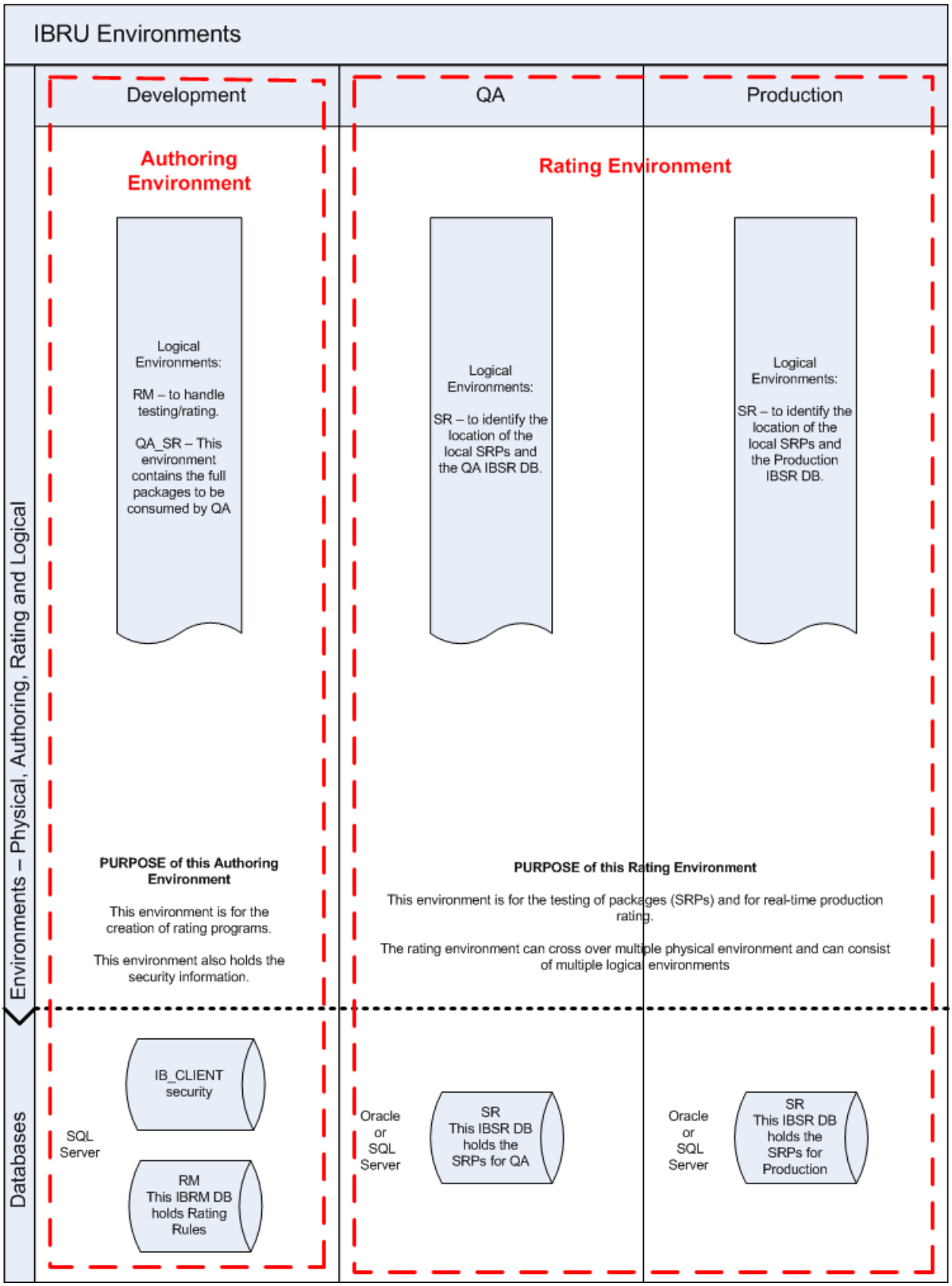
The authoring environment is the physical machine where RateManager is installed. This machine must be a Windows Server machine and must utilize a SQL Server database.

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.


IBRU Environments
Development
QA
Production
Authoring Environment
Rating Environment
Logical Environments:
RM – to handle testing/rating.
QA_SR – This environment contains the full packages to be consumed by QA
Logical Environments:
SR – to identify the location of the local SRPs and the QA IBSR DB.
Logical Environments:
SR – to identify the location of the local SRPs and the Production IBSR DB.
PURPOSE of this Authoring Environment
This environment is for the creation of rating programs.
This environment also holds the security information.
PURPOSE of this Rating Environment
This environment is for the testing of packages (SRPs) and for real-time production rating.
The rating environment can cross over multiple physical environment and can consist of multiple logical environments
Environments – Physical, Authoring, Rating and Logical
Databases
IB_CLIENT security
SQL Server
RM This IBRM DB holds Rating Rules
Oracle or SQL Server
SR This IBSR DB holds the SRPs for QA
Oracle or SQL Server
SR This IBSR DB holds the SRPs for 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.

Chapter 3

WINDOWS ONLY ENVIRONMENT

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

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. OBI Publisher is installed for reports to be created.
    c. On the IBFA/SR-WIN for this environment, three database connections would be created (RM, Security and Controller) and two logical environments would be created.
    d. Two databases would be attached 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. On the IBFA/SR-WIN for this environment, one logical environment and one virtual file server would be created.
    d. One database would be attached to a separate SQL Server machine.

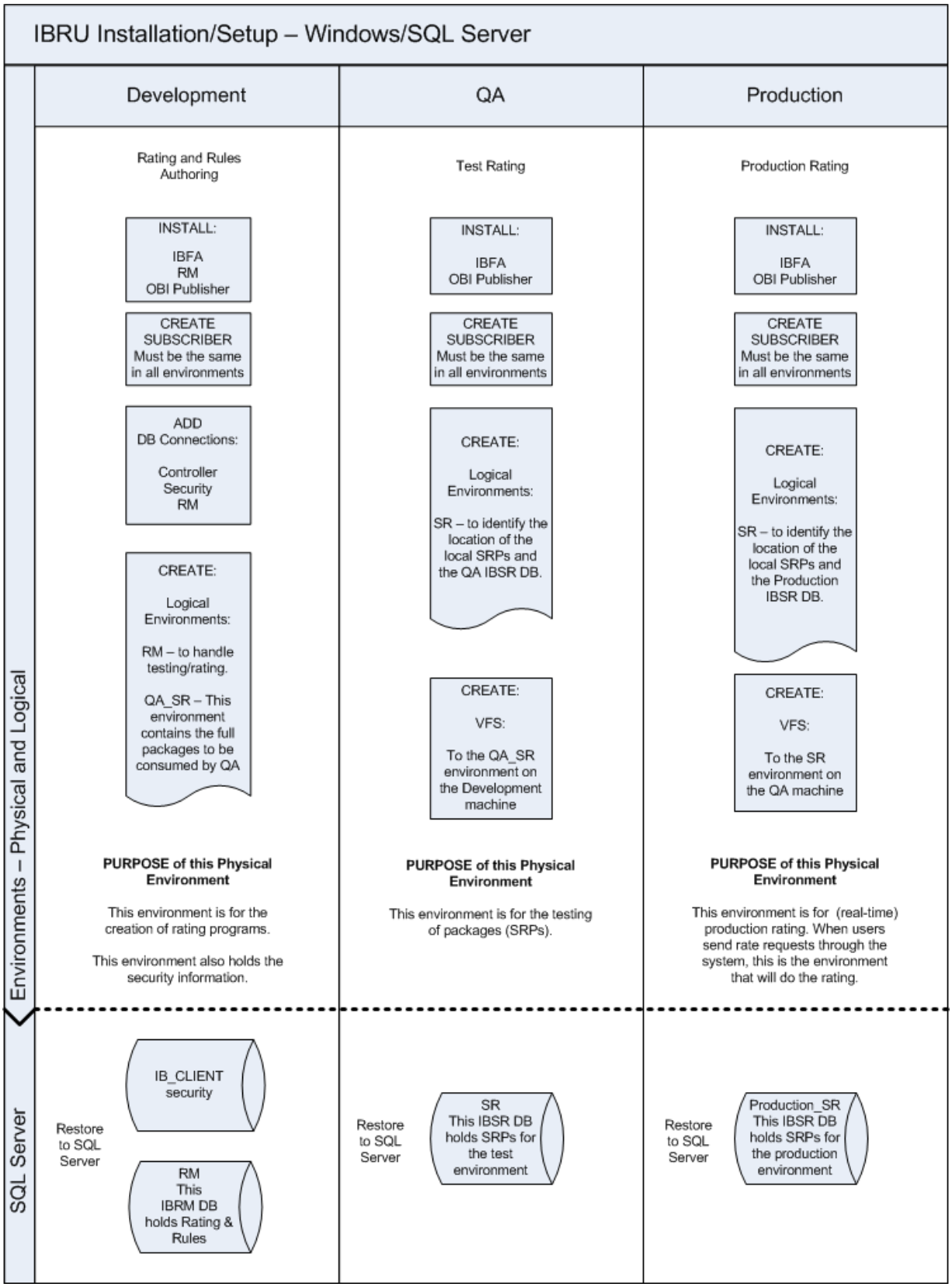
4. In the **Production** environment:
    a. IBFA/SR-WIN would be located on a Windows machine.
    b. OBI Publisher is installed for reports to be created.
    c. On the IBFA/SR-WIN for this environment, one logical environment and one virtual file server would be created.
    d. One database would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

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: *The names used in the logical environments are for example only. You should name your environments according to your company's standards.*

Example


IBRU Installation/Setup – Windows/SQL Server
Environments – Physical and Logical
SQL Server
Development
QA
Production
Rating and Rules Authoring
Test Rating
Production Rating
INSTALL:
IBFA
RM
OBI Publisher
INSTALL:
IBFA
OBI Publisher
INSTALL:
IBFA
OBI Publisher
CREATE SUBSCRIBER
Must be the same in all environments
CREATE SUBSCRIBER
Must be the same in all environments
CREATE SUBSCRIBER
Must be the same in all environments
ADD
DB Connections:
Controller
Security
RM
CREATE:
Logical Environments:
SR – to identify the location of the local SRPs and the QA IBSR DB.
CREATE:
Logical Environments:
SR – to identify the location of the local SRPs and the Production IBSR DB.
CREATE:
Logical Environments:
RM – to handle testing/rating.
QA_SR – This environment contains the full packages to be consumed by QA
CREATE:
VFS:
To the QA_SR environment on the Development machine
CREATE:
VFS:
To the SR environment on the QA machine
PURPOSE of this Physical Environment
This environment is for the creation of rating programs.
This environment also holds the security information.
PURPOSE of this Physical Environment
This environment is for the testing of packages (SRPs).
PURPOSE of this Physical Environment
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.
Restore to SQL Server
IB_CLIENT security
RM This IBRM DB holds Rating & Rules
Restore to SQL Server
SR This IBSR DB holds SRPs for the test environment
Restore to SQL Server
Production_SR This IBSR DB holds SRPs for the production environment

PACKAGE MANAGEMENT

The way SRPs move in a Windows only environment is from Development to QA to Production. Each environment will have an IBFA to manage SRPs.

1. All three application machines would use the same subscriber ID. The subscriber ID must be uniform across all environments in order for each environment to consume the previous environments SRPs.

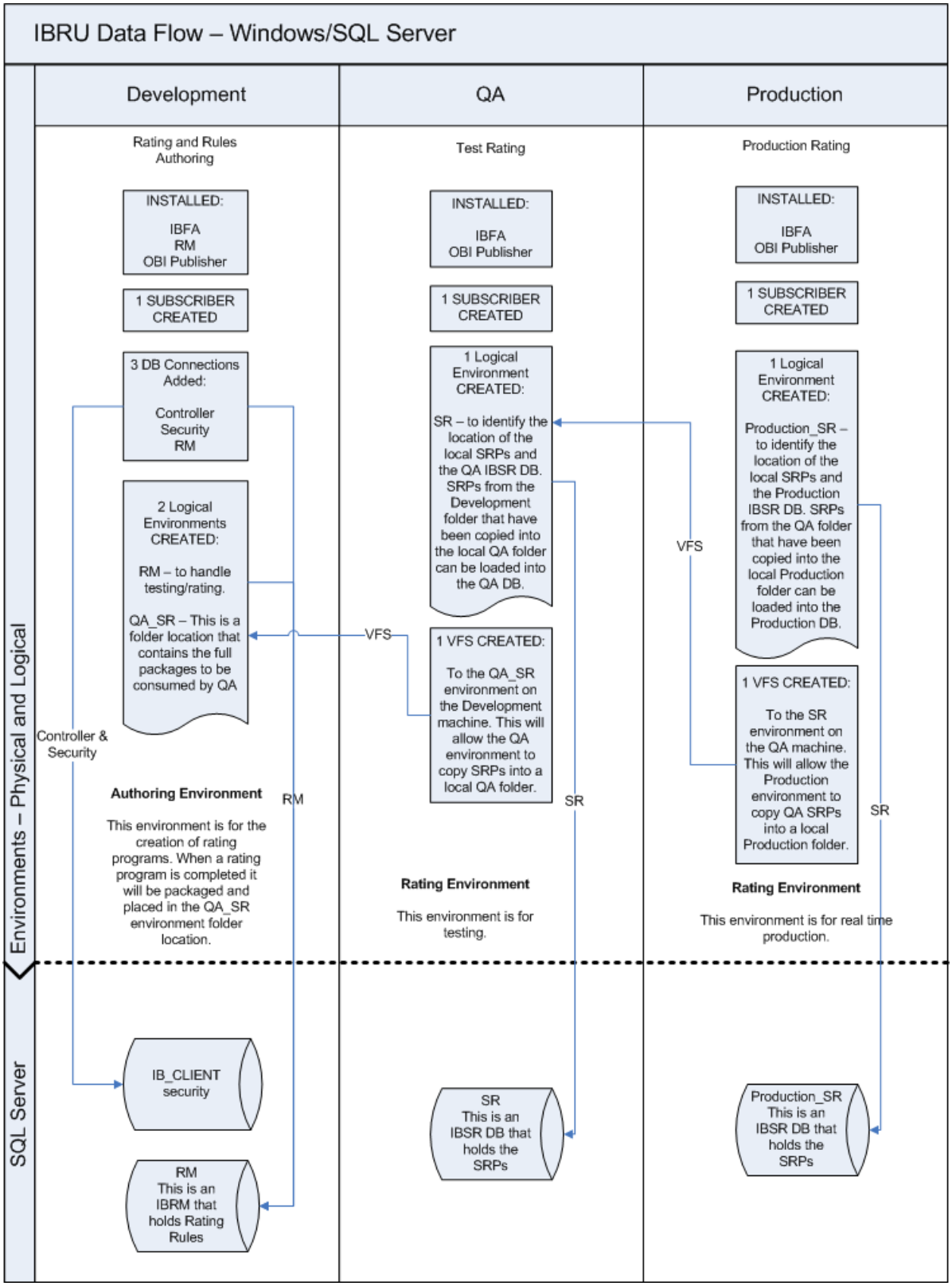
2. In the **Development** environment:
    a. A client database, a security database and a RateManager database connection would be created. The client and security databases will allow users to login. The RateManager database will hold the rating and rules logic used in SRPs.
    b. A RateManager logical environment and a QA_SR logical environment would be created. The RateManager logical environment will allow for local rating to be performed in this environment. The QA_SR logical environment will be used as a holding site for SoftRater (full) SRPs. SRPs that are ready to be copied over to the QA environment for testing will be stored here.

3. In the **QA** environment:
    a. One logical environment would be created here to identify the location of the RateManager (local) SRPs and the QA IBSR DB.
    b. One virtual file server would be created to copy the SRPs from the Development folder on to the local QA folder. These SRPs would be loaded into the QA DB.

4. In the **Production** environment:
    a. One logical environment would be created here to identify the location of the RateManager (local) SRPs and the Production IBSR DB.
    b. One virtual file server would be created to copy the SRPs from the QA folder on to the local Production folder. These SRPs would be loaded into the Production DB.
    c. This environment would be used for real time production rating.

NOTE: *The names used in the logical environments are for example only. You should name your environments according to your company's standards.*

Example


IBRU Data Flow – Windows/SQL Server
Development
QA
Production
Environments – Physical and Logical
SQL Server
Rating and Rules Authoring
Test Rating
Production Rating
INSTALLED: IBFA RM OBI Publisher
INSTALLED: IBFA OBI Publisher
INSTALLED: IBFA OBI Publisher
1 SUBSCRIBER CREATED
1 SUBSCRIBER CREATED
1 SUBSCRIBER CREATED
3 DB Connections Added: Controller Security RM
1 Logical Environment CREATED: SR – to identify the location of the local SRPs and the QA IBSR DB. SRPs from the Development folder that have been copied into the local QA folder can be loaded into the QA DB.
1 Logical Environment CREATED: Production_SR – to identify the location of the local SRPs and the Production IBSR DB. SRPs from the QA folder that have been copied into the local Production folder can be loaded into the Production DB.
2 Logical Environments CREATED: RM – to handle testing/rating. QA_SR – This is a folder location that contains the full packages to be consumed by QA
VFS
1 VFS CREATED: To the QA_SR environment on the Development machine. This will allow the QA environment to copy SRPs into a local QA folder.
VFS
1 VFS CREATED: To the SR environment on the QA machine. This will allow the Production environment to copy QA SRPs into a local Production folder.
Controller & Security
RM
SR
SR
Authoring Environment
This environment is for the creation of rating programs. When a rating program is completed it will be packaged and placed in the QA_SR environment folder location.
Rating Environment
This environment is for testing.
Rating Environment
This environment is for real time production.
IB_CLIENT security
RM This is an IBRM that holds Rating Rules
SR This is an IBSR DB that holds the SRPs
Production_SR This is an IBSR DB that holds the SRPs

Chapter 4

A WINDOWS/JAVA/ORACLE ENVIRONMENT

The Windows/Java environment utilizing an Oracle database example will 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

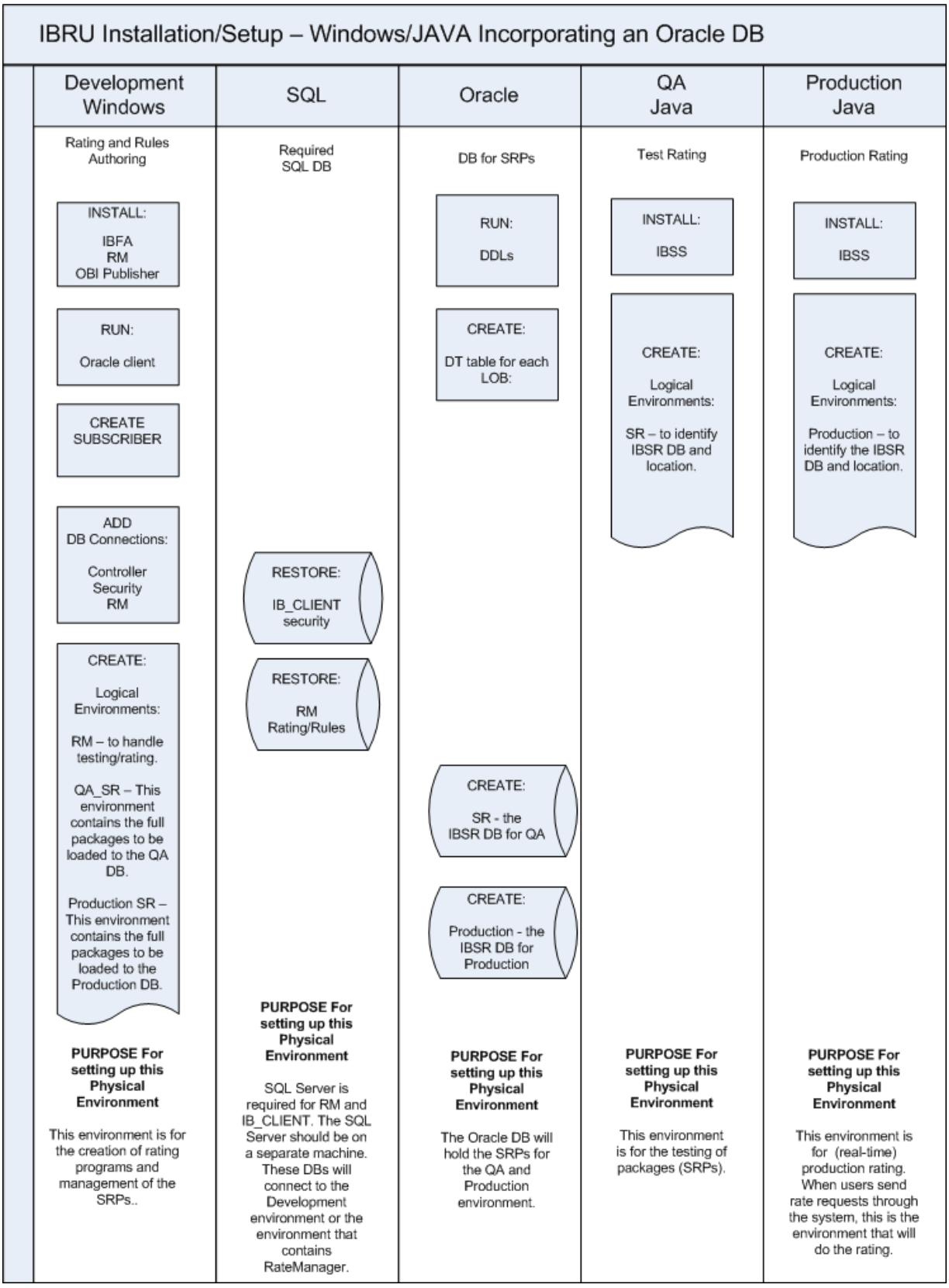
1. The **Development** environment:
    a. Contains one Windows Server app server and one separate SQL Server database.
    b. RateManager and IBFA/SR-WIN would be located on the same Windows machine. RateManager and IBFA must run on a Windows Server machine.
    c. OBI Publisher is installed for reports 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 attached 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.

Example


IBRU Installation/Setup – Windows/JAVA Incorporating an Oracle DB
Development Windows
SQL
Oracle
QA Java
Production Java
Rating and Rules Authoring
Required SQL DB
DB for SRPs
Test Rating
Production Rating
INSTALL: IBFA RM OBI Publisher
RUN: Oracle client
CREATE SUBSCRIBER
ADD DB Connections: Controller Security RM
CREATE: 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.
RESTORE: IB_CLIENT security
RESTORE: RM Rating/Rules
RUN: DDLs
CREATE: DT table for each LOB:
CREATE: SR - the IBSR DB for QA
CREATE: Production - the IBSR DB for Production
INSTALL: IBSS
CREATE: Logical Environments: SR – to identify IBSR DB and location.
INSTALL: IBSS
CREATE: Logical Environments: Production – to identify the IBSR DB and location.
PURPOSE For setting up this Physical Environment
This environment is for the creation of rating programs and management of the SRPs..
PURPOSE For setting up this Physical Environment
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.
PURPOSE For setting up this Physical Environment
The Oracle DB will hold the SRPs for the QA and Production environment.
PURPOSE For setting up this Physical Environment
This environment is for the testing of packages (SRPs).
PURPOSE For setting up this Physical Environment
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.

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.

PACKAGE MANAGEMENT

The way SRPs move in a Windows/Java environment utilizing an Oracle database is from Development to QA to Production. IBFA will manage the migration of the packages. Only the development environment will have an IBFA to manage SRPs. The Rating and Production environments will require an IBSS/SR-JAVA. IBSS will allow for a logical environment to be created. Only the development environment will be able to move SRPs from one environment to the next (IBFA).

1. Only the development machine will hold the subscriber ID or Company ID.

2. In the **Development** environment:
    a. A client database, a security database and a RateManager database connection would be created. The client and security databases will allow users to login. The RateManager database will hold the rating and rules logic used in SRPs.
    b. A RateManager logical environment would need to be created. The RateManager logical environment will allow for local rating to be performed in this environment. When an SRP is created in the RateManager logical environment, the IBFA in the development environment will copy and load into the QA_SR logical environment.
    c. A QA_SR logical environment would need to be created. The QA_SR logical environment will be used to hold the SRPs that are ready for testing. When testing is complete, the IBFA in the development environment will copy and load into the Production_SR logical environment.
    d. A Production_SR would need to be created to hold the SRPs that need to go into production.

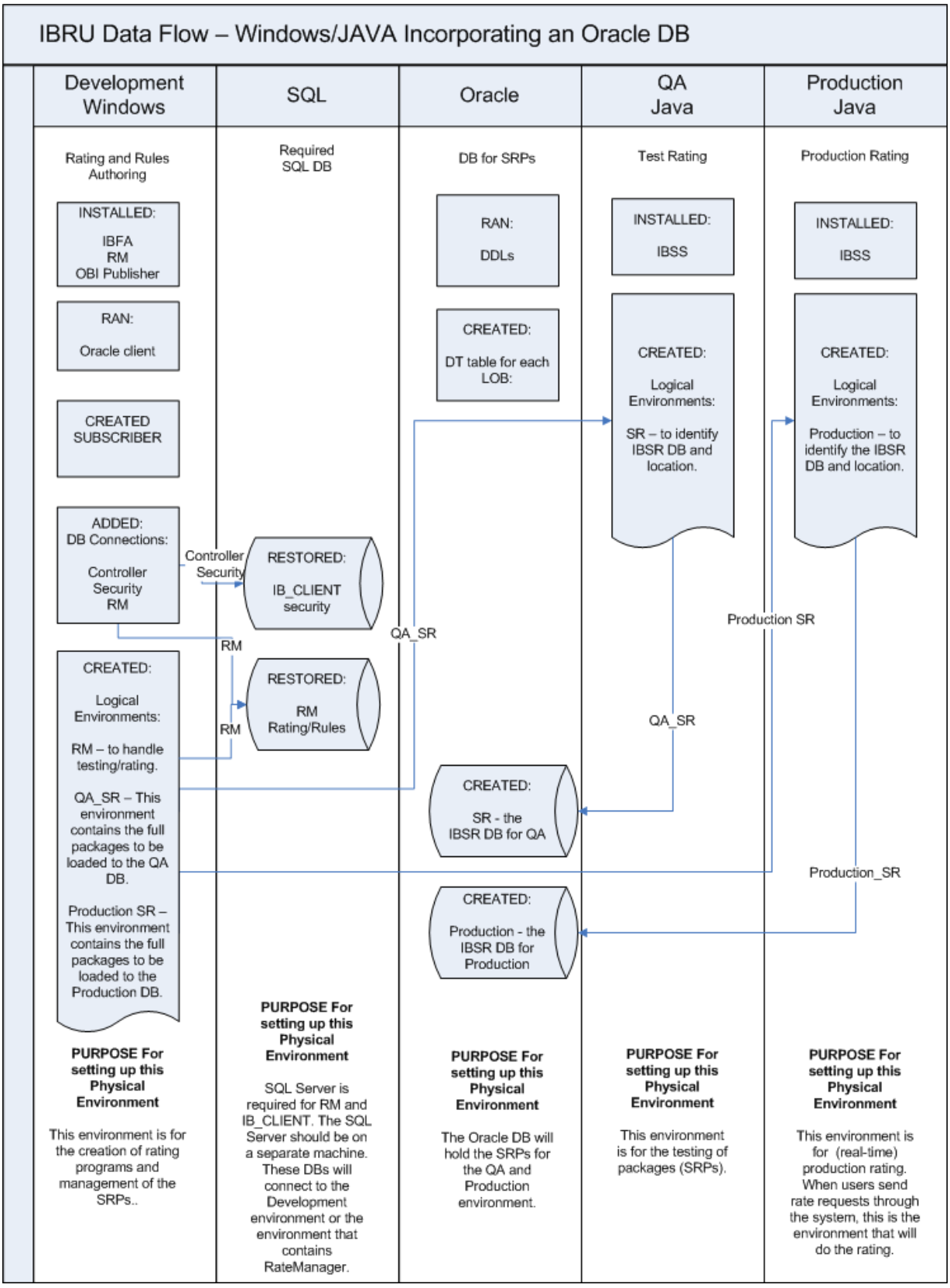
3. In the **QA** environment:
    a. One logical environment would be created here to identify the location of the QA IBSR DB.
    b. This environment would be used for testing.

4. In the **Production** environment:
    a. One logical environment would be created here to identify the Production IBSR DB.
    b. This environment would be used for real time production rating.

NOTE: *The names used in the logical environments are for example only. You should name your environments according to your company's standards.*

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

EXAMPLE


IBRU Data Flow – Windows/JAVA Incorporating an Oracle DB
Development Windows
SQL
Oracle
QA Java
Production Java
Rating and Rules Authoring
Required SQL DB
DB for SRPs
Test Rating
Production Rating
INSTALLED: IBFA RM OBI Publisher
RAN: Oracle client
CREATED SUBSCRIBER
ADDED: DB Connections: Controller Security RM
CREATED: 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.
RAN: DDLs
CREATED: DT table for each LOB:
INSTALLED: IBSS
CREATED: Logical Environments: SR – to identify IBSR DB and location.
INSTALLED: IBSS
CREATED: Logical Environments: Production – to identify the IBSR DB and location.
Controller Security
RESTORED: IB_CLIENT security
RM
RESTORED: RM Rating/Rules
RM
QA_SR
Production SR
QA_SR
CREATED: SR - the IBSR DB for QA
Production_SR
CREATED: Production - the IBSR DB for Production
PURPOSE For setting up this Physical Environment
This environment is for the creation of rating programs and management of the SRPs..
PURPOSE For setting up this Physical Environment
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.
PURPOSE For setting up this Physical Environment
The Oracle DB will hold the SRPs for the QA and Production environment.
PURPOSE For setting up this Physical Environment
This environment is for the testing of packages (SRPs).
PURPOSE For setting up this Physical Environment
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.

Chapter 5

WINDOWS/ORACLE ENVIRONMENT

The Windows environment utilizing an Oracle database example will 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 attached to a separate SQL Server machine.

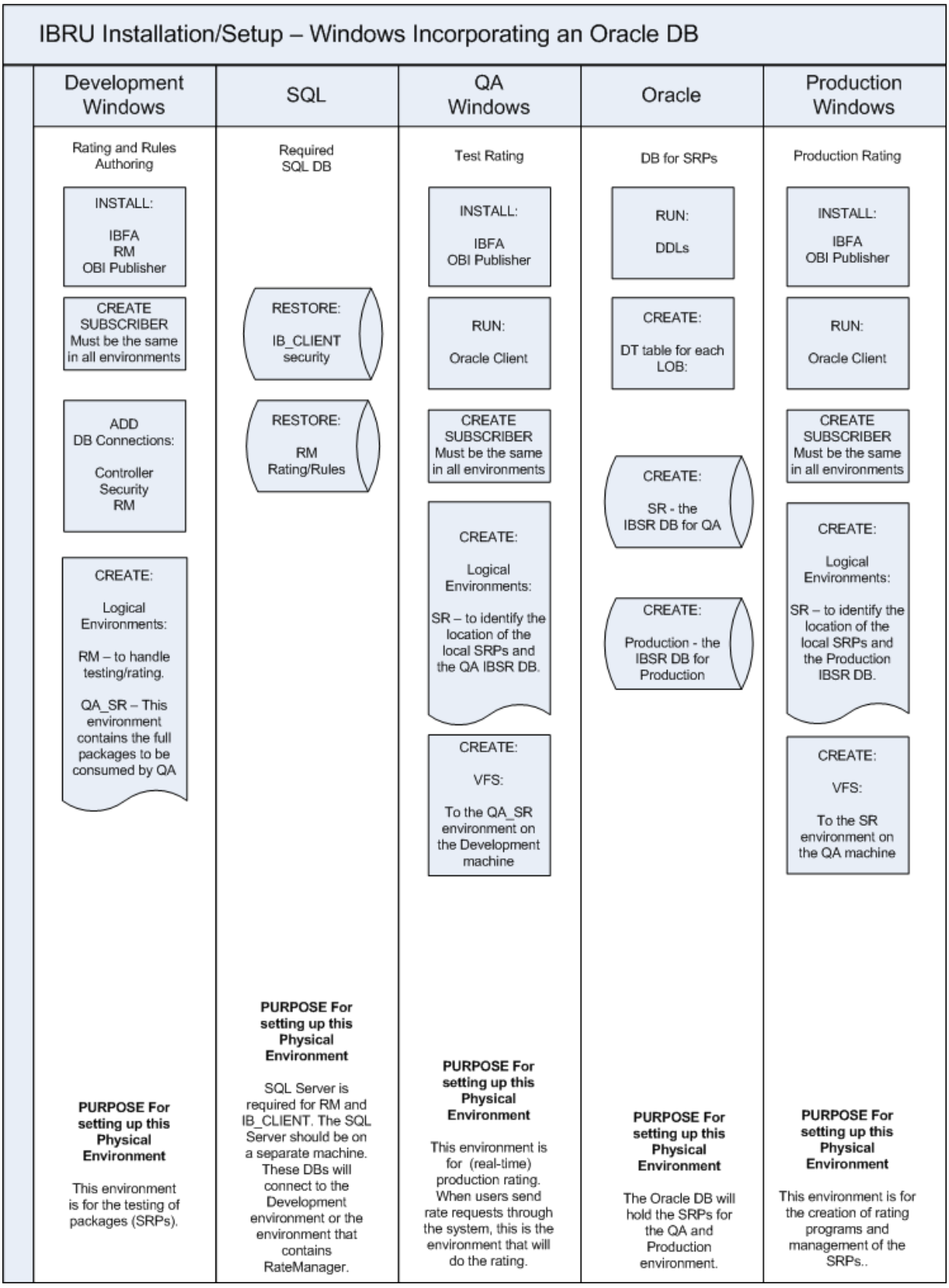
3. In the **QA** environment:
    a. IBFA/SR-WIN would be located on a Windows machine.
    b. OBI Publisher is installed for reports to be created.
    c. The Oracle client would be run.
    d. On the IBFA/SR-WIN for this environment, one logical environment and one virtual file server would be created.
    e. One database would be attached 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 attached to a separate Oracle DB.

5. 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 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
Rating and Rules Authoring
Required SQL DB
Test Rating
DB for SRPs
Production Rating
INSTALL: IBFA RM OBI Publisher
CREATE SUBSCRIBER Must be the same in all environments
ADD DB Connections: Controller Security RM
CREATE: Logical Environments: RM – to handle testing/rating. QA_SR – This environment contains the full packages to be consumed by QA
RESTORE: IB_CLIENT security
RESTORE: RM Rating/Rules
INSTALL: IBFA OBI Publisher
RUN: Oracle Client
CREATE SUBSCRIBER Must be the same in all environments
CREATE: Logical Environments: SR – to identify the location of the local SRPs and the QA IBSR DB.
CREATE: VFS: To the QA_SR environment on the Development machine
RUN: DDLs
CREATE: DT table for each LOB:
CREATE: SR - the IBSR DB for QA
CREATE: Production - the IBSR DB for Production
INSTALL: IBFA OBI Publisher
RUN: Oracle Client
CREATE SUBSCRIBER Must be the same in all environments
CREATE: Logical Environments: SR – to identify the location of the local SRPs and the Production IBSR DB.
CREATE: VFS: To the SR environment on the QA machine
PURPOSE For setting up this Physical Environment
This environment is for the testing of packages (SRPs).
PURPOSE For setting up this Physical Environment
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.
PURPOSE For setting up this Physical Environment
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.
PURPOSE For setting up this Physical Environment
The Oracle DB will hold the SRPs for the QA and Production environment.
PURPOSE For setting up this Physical Environment
This environment is for the creation of rating programs and management of the SRPs..

PACKAGE MANAGEMENT

The way SRPs move in a Windows environment utilizing an Oracle database is from Development to QA to Production. Each environment will have an IBFA to manage SRPs. Make sure to run the Oracle client on each machine to allow for the SRPs to be written to the Oracle database.

1. All three application machines would use the same subscriber ID. The subscriber ID must be uniform across all environments in order for each environment to consume the previous environments SRPs.

2. In the **Development** environment:
    a. A client database, a security database and a RateManager database connection would be created. The client and security databases will allow users to login. The RateManager database will hold the rating and rules logic used in SRPs.
    b. A RateManager logical environment and a QA_SR logical environment would be created. The RateManager logical environment will allow for local rating to be performed in this environment. The QA_SR logical environment will be used as a holding site for SoftRater (full) SRPs. SRPs that are ready to be copied over to the QA environment for testing will be stored here.

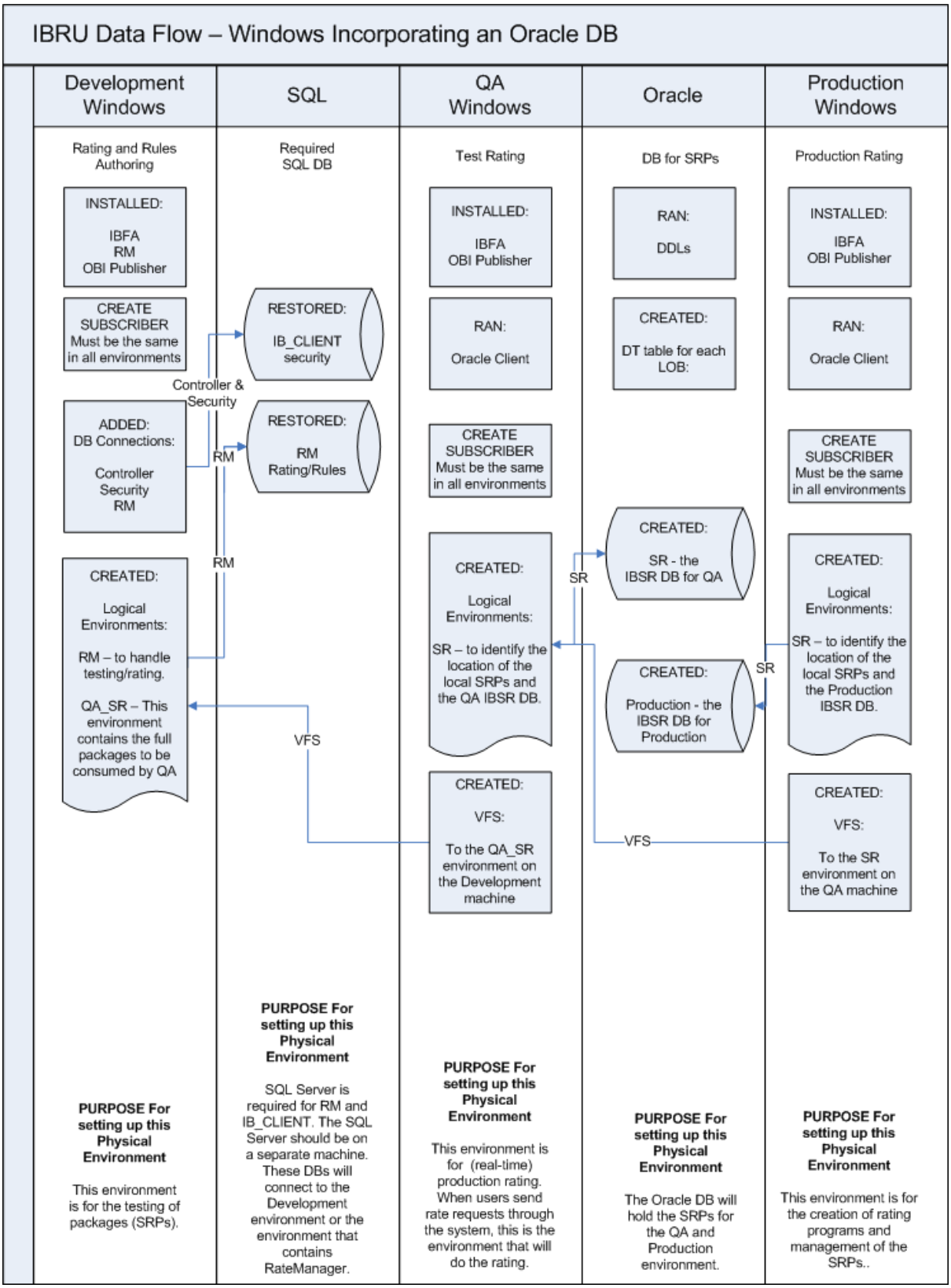
3. In the **QA** environment:
    a. One logical environment would be created here to identify the location of the RateManager (local) SRPs and the QA IBSR DB.
    b. One virtual file server would be created to copy the SRPs from the Development folder on to the local QA folder. These SRPs would be loaded into the QA DB.

4. In the **Production** environment:
    a. One logical environment would be created here to identify the location of the RateManager (local) SRPs and the Production IBSR DB.
    b. One virtual file server would be created to copy the SRPs from the QA folder on to the local Production folder. These SRPs would be loaded into the Production DB.
    c. This environment would be used for real time production rating.

NOTE: *The names used in the logical environments are for example only. You should name your environments according to your company's standards.*

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

Example


IBRU Data Flow – Windows Incorporating an Oracle DB
Development Windows
SQL
QA Windows
Oracle
Production Windows
Rating and Rules Authoring
Required SQL DB
Test Rating
DB for SRPs
Production Rating
INSTALLED: IBFA RM OBI Publisher
CREATE SUBSCRIBER Must be the same in all environments
RESTORED: IB_CLIENT security
Controller & Security
ADDED: DB Connections: Controller Security RM
RM
RESTORED: RM Rating/Rules
CREATED: Logical Environments: RM – to handle testing/rating. QA_SR – This environment contains the full packages to be consumed by QA
RM
VFS
INSTALLED: IBFA OBI Publisher
RAN: Oracle Client
CREATE SUBSCRIBER Must be the same in all environments
CREATED: Logical Environments: SR – to identify the location of the local SRPs and the QA IBSR DB.
CREATED: VFS: To the QA_SR environment on the Development machine
RAN: DDLs
CREATED: DT table for each LOB:
CREATED: SR - the IBSR DB for QA
SR
CREATED: Production - the IBSR DB for Production
VFS
INSTALLED: IBFA OBI Publisher
RAN: Oracle Client
CREATE SUBSCRIBER Must be the same in all environments
CREATED: Logical Environments: SR – to identify the location of the local SRPs and the Production IBSR DB.
SR
CREATED: VFS: To the SR environment on the QA machine
PURPOSE For setting up this Physical Environment
This environment is for the testing of packages (SRPs).
PURPOSE For setting up this Physical Environment
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.
PURPOSE For setting up this Physical Environment
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.
PURPOSE For setting up this Physical Environment
The Oracle DB will hold the SRPs for the QA and Production environment.
PURPOSE For setting up this Physical Environment
This environment is for the creation of rating programs and management of the SRPs..

Chapter 6

WINDOWS/JAVA/SQL SERVER ENVIRONMENT

A Windows/Java environment utilizing SQL Server is another straight forward setup. 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.

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 SETUP

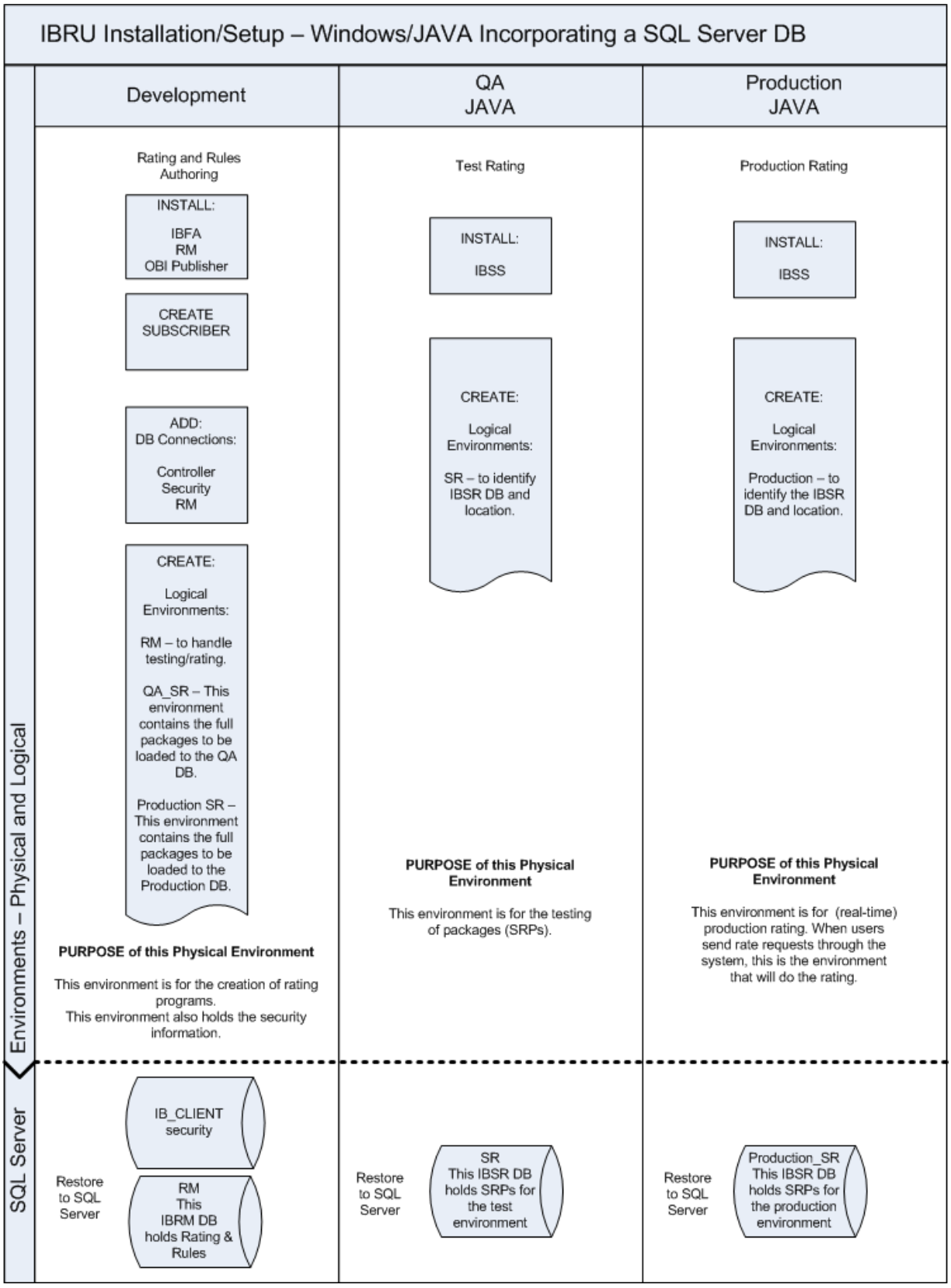
1. The **Development** environment:
    a. Contains one Windows Server app server and one separate SQL Server database.
    b. RateManager and IBFA/SR-WIN would be located on the same Windows machine. RateManager and IBFA must run on a Windows Server machine.
    c. OBI Publisher is installed for reports 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. Two databases would be attached to the SQL Server machine.

2. The **QA** environment:
    a. Contains one JAVA application server with WebLogic, WebSphere or JBoss installed and running and one separate SQL Server database.
    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 attached to the SQL Server machine.

3. The **Production** environment:
    a. Contains one JAVA application server with WebLogic, WebSphere or JBoss installed and running and one separate SQL Server database.
    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 attached to the SQL Server machine.

This is a basic Windows/Java utilizing a SQL Server 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.

Example


IBRU Installation/Setup – Windows/JAVA Incorporating a SQL Server DB
Development
QA
JAVA
Production
JAVA
Environments – Physical and Logical
SQL Server
Rating and Rules Authoring
INSTALL:
IBFA
RM
OBI Publisher
CREATE SUBSCRIBER
ADD:
DB Connections:
Controller
Security
RM
CREATE:
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.
PURPOSE of this Physical Environment
This environment is for the creation of rating programs.
This environment also holds the security information.
Test Rating
INSTALL:
IBSS
CREATE:
Logical Environments:
SR – to identify IBSR DB and location.
PURPOSE of this Physical Environment
This environment is for the testing of packages (SRPs).
Production Rating
INSTALL:
IBSS
CREATE:
Logical Environments:
Production – to identify the IBSR DB and location.
PURPOSE of this Physical Environment
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.
IB_CLIENT security
Restore to SQL Server
RM This IBRM DB holds Rating & Rules
Restore to SQL Server
SR This IBSR DB holds SRPs for the test environment
Restore to SQL Server
Production_SR This IBSR DB holds SRPs for the production environment

PACKAGE MANAGEMENT

The way SRPs move in a Windows/Java environment utilizing a SQL Server database is from Development to QA to Production. Only the development environment will have an IBFA to manage SRPs. The QA and Production environments will require an IBSS/SR-JAVA. IBSS will allow for a logical environment to be created, but not for a Virtual File Server to be created or to copy and load packages. Only the development environment will be able to move SRPs from one environment to the next.

1. Only the development machine will hold the subscriber ID. IBSS/SR-JAVA does not allow for the creation of subscriber IDs.

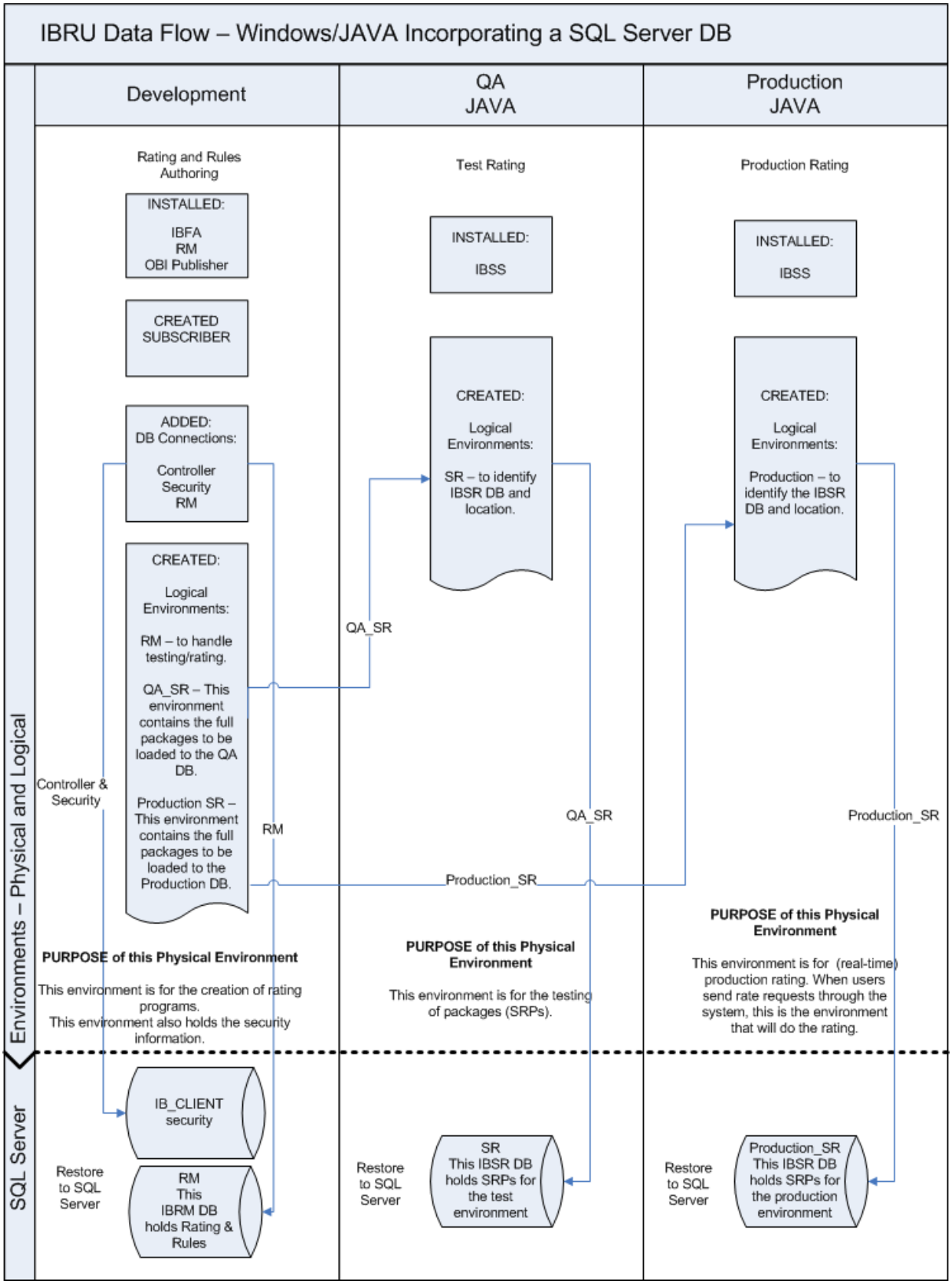
2. In the **Development** environment:
    a. A client database, a security database and a RateManager database connection would be created. The client and security databases will allow users to login. The RateManager database will hold the rating and rules logic used in SRPs.
    b. A RateManager logical environment would need to be created. The RateManager logical environment will allow for local rating to be performed in this environment. When an SRP is created in the RateManager logical environment, the IBFA in the development environment will copy and load into the QA_SR logical environment.
    c. A QA_SR logical environment would need to be created. The QA_SR logical environment will be used to hold the SRPs that are ready for testing. When testing is complete, the IBFA in the development environment will copy and load into the Production_SR logical environment.
    d. A Production_SR would need to be created to hold the SRPs that need to go into production.

3. In the **QA** environment:
    a. One logical environment would be created here to identify the location of the QA IBSR DB.
    b. This environment would be used for testing.

4. In the **Production** environment:
    a. One logical environment would be created here to identify the Production IBSR DB.
    b. This environment would be used for real time production rating.

NOTE: *The names used in the logical environments are for example only. You should name your environments according to your company's standards.*

EXAMPLE


IBRU Data Flow – Windows/JAVA Incorporating a SQL Server DB
Development
QA
JAVA
Production
JAVA
Environments – Physical and Logical
SQL Server
Rating and Rules Authoring
INSTALLED:
IBFA
RM
OBI Publisher
CREATED SUBSCRIBER
ADDED:
DB Connections:
Controller
Security
RM
CREATED:
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.
Controller & Security
RM
PURPOSE of this Physical Environment
This environment is for the creation of rating programs.
This environment also holds the security information.
IB_CLIENT security
Restore to SQL Server
RM
This
IBRM DB
holds Rating &
Rules
Test Rating
INSTALLED:
IBSS
CREATED:
Logical Environments:
SR – to identify IBSR DB and location.
QA_SR
QA_SR
Production_SR
PURPOSE of this Physical Environment
This environment is for the testing of packages (SRPs).
Restore to SQL Server
SR
This IBSR DB
holds SRPs for
the test
environment
Production Rating
INSTALLED:
IBSS
CREATED:
Logical Environments:
Production – to identify the IBSR DB and location.
Production_SR
PURPOSE of this Physical Environment
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.
Restore to SQL Server
Production_SR
This IBSR DB
holds SRPs for
the production
environment

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

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