ORACLE
INSURANCE

Oracle Insurance

Insbridge Rating and Underwriting Installation and Upgrade Guide

For 64-bit

Release 4.5

May 2011

Copyright © 2005, 2011, Oracle and/or its affiliates. All rights reserved.

Oracle Insurance Insbridge Rating and Underwriting Installation and Upgrade Guide for 64-bit

Release 4.5

Part # E22923-01

Library # E22944-01

May 2011

Primary Author: Mary Elizabeth Wiger

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Where an Oracle offering includes third party content or software, we may be required to include related notices. For information on third party notices and the software and related documentation in connection with which they need to be included, please contact the attorney from the Development and Strategic Initiatives Legal Group that supports the development team for the Oracle offering. Contact information can be found on the Attorney Contact Chart.

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your beta trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Software License and Service Agreement, which has been executed and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

CONTENTS

PREFACE 6
AUDIENCE 6
PLANNING YOUR IBRU SYSTEM 6
TYPES OF INSTALLATION 6
Definitions 7
Related Documents 8
Manual History 8

CHAPTER 1 9
SYSTEM REQUIREMENTS 9
Server Requirements 9
Required Components 9
INSBRIDGE LOCAL USER ACCOUNT SETUP 9
Insbridge User Password 11
Extended Permission Required by the Insbridge User 13
DATABASE USER ROLES AND PERMISSIONS 14
MICROSOFT SQL SERVER 15
E-Delivery 15

CHAPTER 2 17
FULL RATEMANAGER INSTALLATION 17
STEP 1 – INSTALL INSBRIDGE RATING AND UNDERWRITING 18
STEP 2 – VERIFYING REGISTRY ACCESS 24
Verifying Permissions for the Registry Access 24
STEP 3 – ASSIGNING PERMISSIONS – WINDOWS TEMP FOLDER 27
STEP 4 – ASSIGNING PERMISSIONS – INSBRIDGE FOLDER 30
STEP 5 – RESTORING IBRU DATABASES IN SQL SERVER 32
STEP 6 – CONFIGURING INSBRIDGE FRAMEWORK ADMINISTRATOR 36
STEP 7 – VERIFYING THE COMPONENT SERVICES 47
STEP 8 – ALLOWING FOR WCF ACTIVATION 49
STEP 9 – INSTALLING THE OBI PUBLISHER 50
STEP 10 – STARTING INSBRIDGE SERVICES 51
STEP 11 – PERFORMING UPDATES IN RATEMANAGER 52
RUNNING DATABASE UPDATES IN RATEMANAGER 53
UPDATING PREFERENCES 54
Web Settings 56
STEP 12 – EXPORT INSBRIDGE REGISTRY KEY FOR BACKUP 59

CHAPTER 3 60
MANUAL UPDATES TO THE IBRU DATABASES 60

TO PERFORM DATABASE UPDATES FROM RATEMANAGER 60

CHAPTER 4 63

CREATING A SOFTRATER ENVIRONMENT 63

STEP 1 – RESTORING THE IBSR DATABASE 63

STEP 2 – CONFIGURE A QA LOGICAL ENVIRONMENT 65

SUPPORT 67

CONTACTING SUPPORT 67

TTY ACCESS TO ORACLE SUPPORT SERVICES 67

INDEX 68

LIST OF FIGURES

Figure 1 Creating New User 10
Figure 2 Adding User information 11
Figure 3 Windows 2008 Permissions 12
Figure 4 Adding IIS 6 Metabase Compatibility 13
Figure 5 Installing Insbridge 18
Figure 6 Entering the Destination Folder for Insbridge 19
Figure 7 Logon Information 20
Figure 8 Selecting Features for Installation 21
Figure 9 Ready to Install 22
Figure 10 Installation Progress 22
Figure 11 Install Completion Screen 23
Figure 12 Configure Registry Access Windows Server 24
Figure 13 Entering the User 25
Figure 14 Applying Permissions for Insbridge User 26
Figure 15 Verifying Application Pool Settings 27
Figure 16 Assigning Permissions for the Insbridge User on Windows Temp 28
Figure 17 Assigning Permissions for the Insbridge User on Insbridge 30
Figure 18 Setting Permission for Insbridge Folder 31
Figure 19 Restoring a Database to SQL Server 33
Figure 20 Right Click to Restore Database 33
Figure 21 Restoring a Database 34
Figure 22 IBFA Home 36
Figure 23 Enter ID 37
Figure 24 Setting up the Global Database Connection 39
Figure 25 Adding a Database Connection 40
Figure 26 Setting up the Security Database Connection 41
Figure 27 Setting up the RateManager Database Connection 42
Figure 28 Create a Rating Environment 43
Figure 29 Entering Name and Environment 44
Figure 30 Obtaining Environment Information 44
Figure 31 Editing Environment 45
Figure 32 Component Services 47
Figure 33 Selecting WCF Activation 49
Figure 34 Installing OBI Publisher 50
Figure 35 Insbridge Services Screen 51
Figure 36 Tool Mandatory Update 53
Figure 37 Available Updates 53
Figure 38 Updating Scripts in RateManager 54
Figure 39 Preferences Settings 55
Figure 40 Script Viewer 61
Figure 41 Updating Database 62
Figure 42 Editing Environment 65

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.

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.

For more on planning your IBRU system, please see the Insbridge Implementation Guide.

TYPES OF INSTALLATION

There are various types of installations:

Windows Environment:

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

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 04.05.00.

This guide is for a Full RateManager installation on a 64-bit machine.

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.
- **SoftRater Native** – SoftRater Native is a remote instance of SoftRater that can execute rules and rating logic in environments where access via the SoftRater web-services is not desired or possible.
- **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.

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/technetwork/documentation/insurance-097481.html

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-702-01	R 4.0.1	08/31/2010	Updated for 64-bit / Windows 2008
2nd Edition	P01-702-02	R 4.1	December 2010	Update Release
3rd Edition	P01-702-03	R 4.5	May 2011	Update Release

Chapter 1

SYSTEM REQUIREMENTS

Server Requirements

IBRU installers should be familiar with managing a Windows server. For a 32-bit machine, please see the Insbridge RateManager Installation Guide.

Required Components

The following components are required prior to running the installation. Failure to have the required components may result in an installation error.

- **A full installation of Microsoft Windows Server 2008 for 64-bit is required**
- **Microsoft .NET Framework version 3.5**
- **IIS – Internet Information Services version 6.0 or 7.0**
- **IIS 6 Metabase Compatibility**
- **Web Server (IIS) – Static Content is required**
- **WCF http activation needs to be enabled**
- **MSMQ – Microsoft Message Queuing Services – basic functionality only.**
- **JRE – Java Runtime Environment**
- **Insbridge User Account**

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. Select Start→Administrative Tools→Server Manager.
2. Select Configuration→Local Users and Groups.
3. Select Users.
4. Right click and select **New User**.

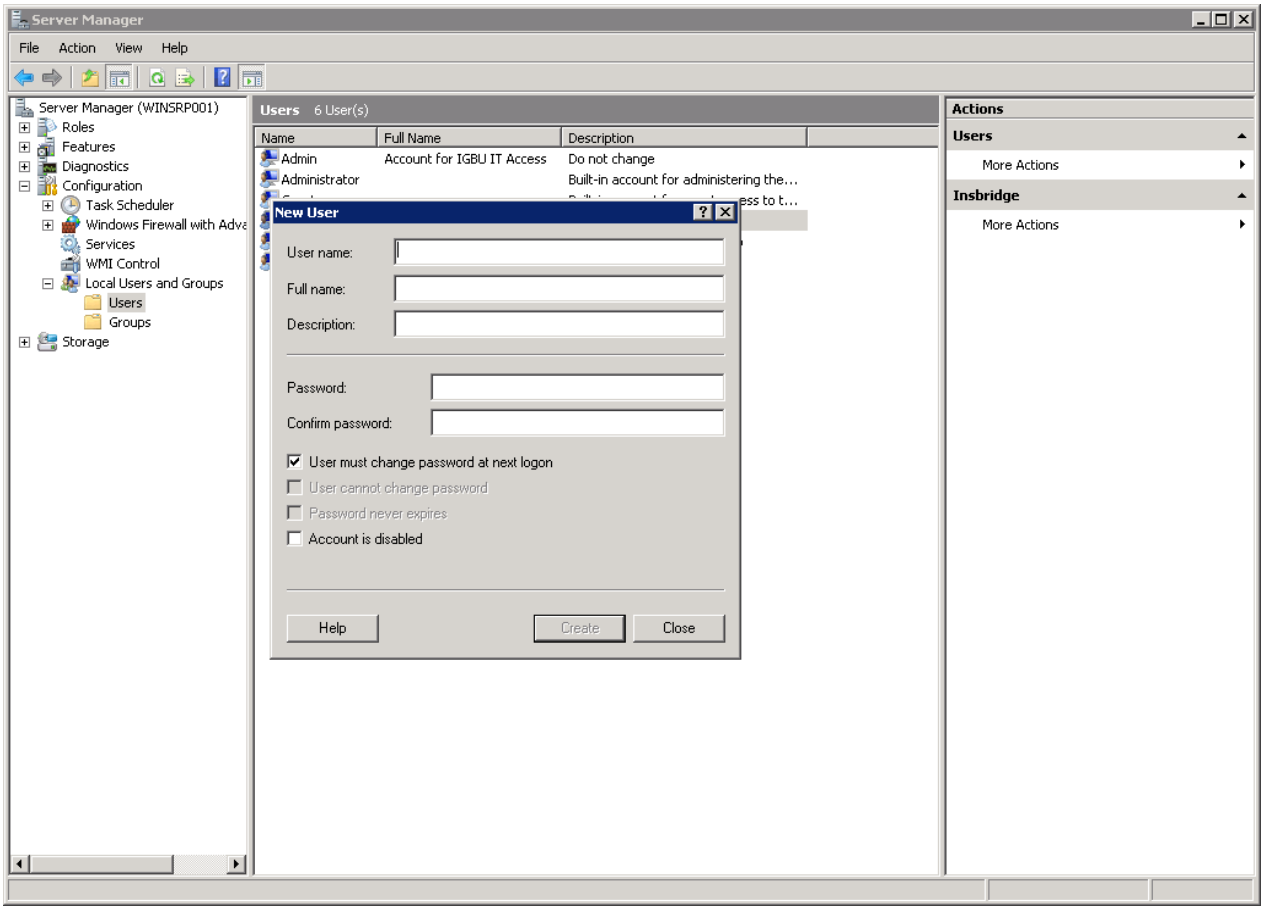


Figure 1 Creating New User

5. Add an 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.

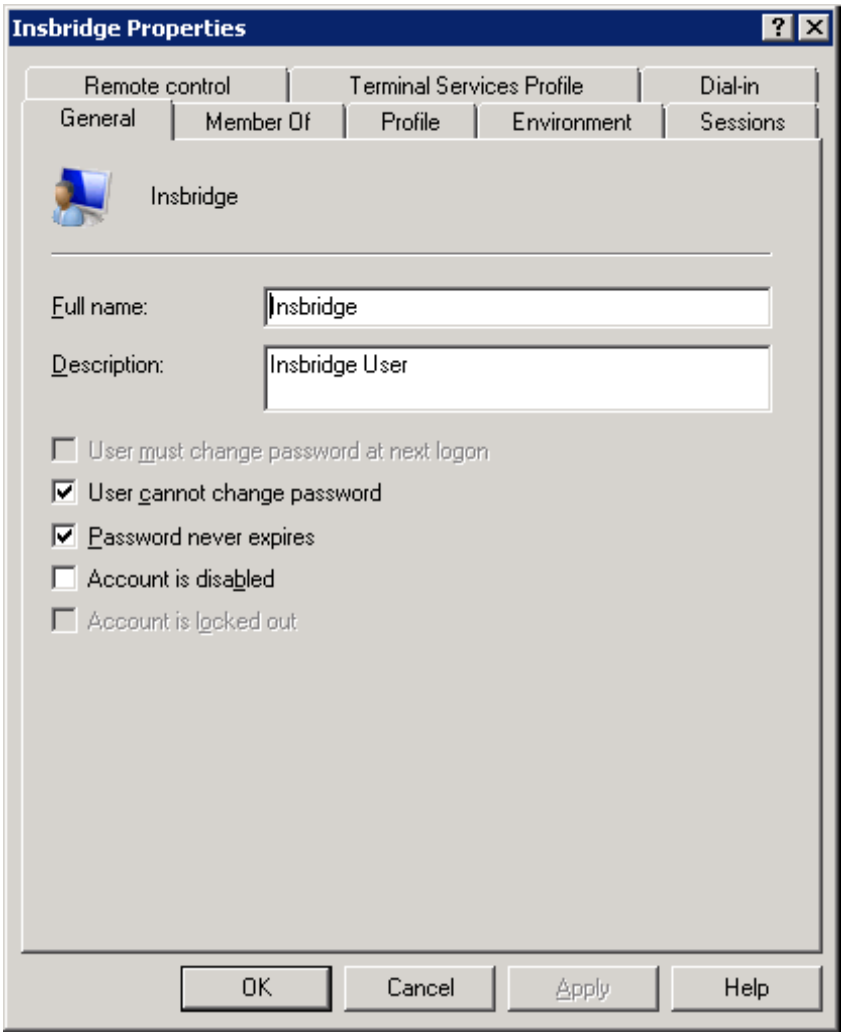


Figure 2 Adding User information

6. Click **OK**. Your Insbridge user will be created. User information may not populate the Server Manager screen immediately. Click Cancel to close the screen and return to Server Manager. Please keep the Insbridge user information close at hand. You will need it for the first installation.

***NOTE**: You also can create the Insbridge User from within the install. If you create an Insbridge user from the install, you may not be able to set the permissions you need. Please be sure to verify the proper permissions are in place before continuing.*

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.

The installation will automatically apply the Insbridge user name and password to the necessary libraries, virtual directories and, if used, Internet Proxy settings in IBFA. If you change the Insbridge user password, you will have to change the password in all three of the Insbridge Com+ libraries, all three of the Insbridge virtual directories and, if you are using it, the Internet Proxy settings in IBFA.

Please note that if your company requires passwords to be re-set, you will have to make changes to the COM+ Application libraries, virtual directories and if you are using it, the Internet Proxy settings in IBFA after you change your password. You also may re-install the application. This will recreate the COM+ applications, virtual directories and IBFA instance with the updated Insbridge user password. Be aware that re-installing the application will also reset security settings in IBFA as well.

Windows 2008 Permissions:

Windows 2008 requires certain permissions be in place prior to running the install. The permissions required for Windows 2008 are:

- **For Windows 2008 Server – IIS 6 Metabase Compatibility**
- **For Windows 2008 Server – Web Server (IIS) – Static Content is required**
- **For Windows 2008 Server – WCF http activation needs to be enabled**

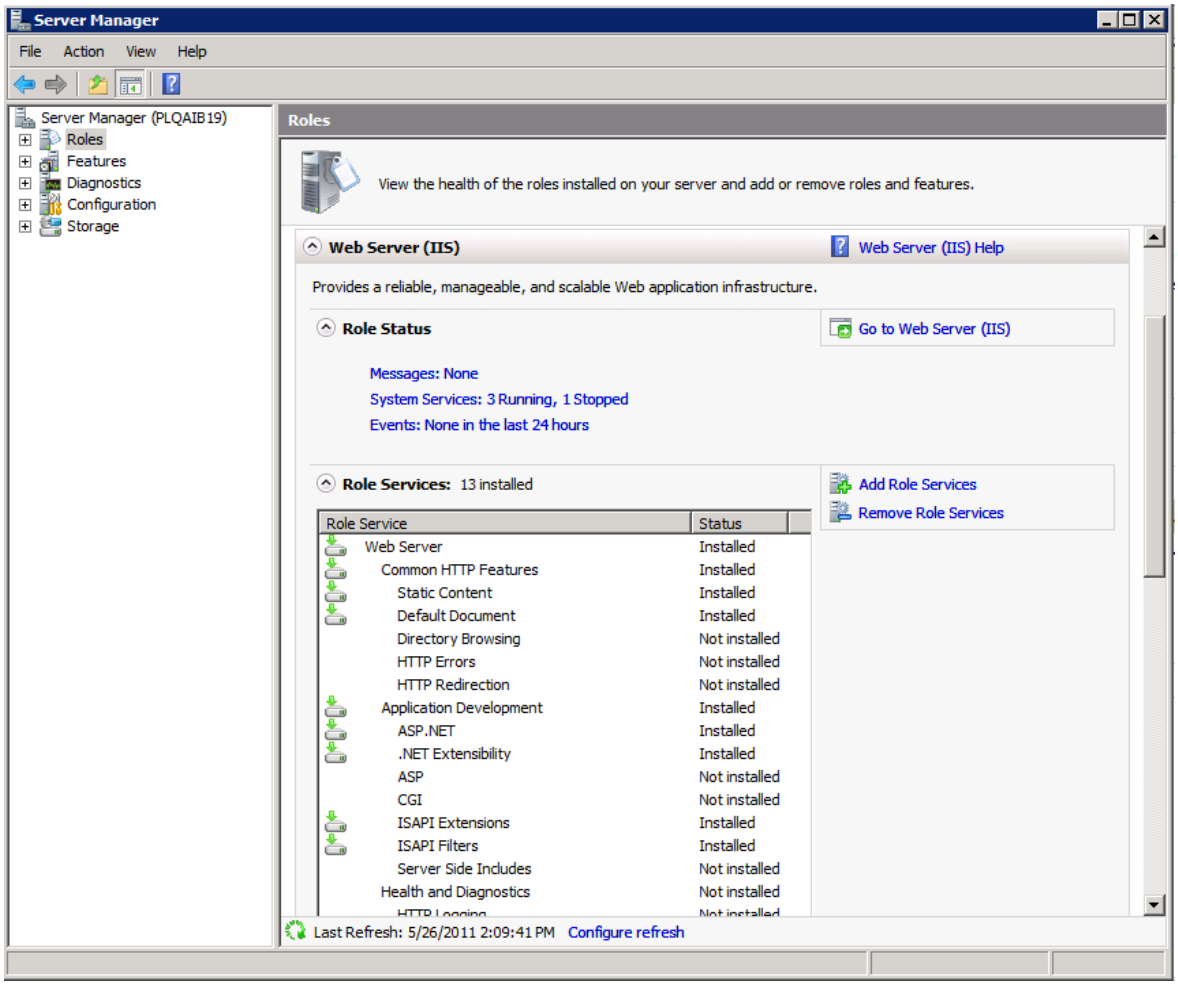


Figure 3 Windows 2008 Permissions

To Add a Role:

1. Start→ Administrative Tools→ Server Manager→ Roles→ Web Server (IIS)→ Add Role Services.

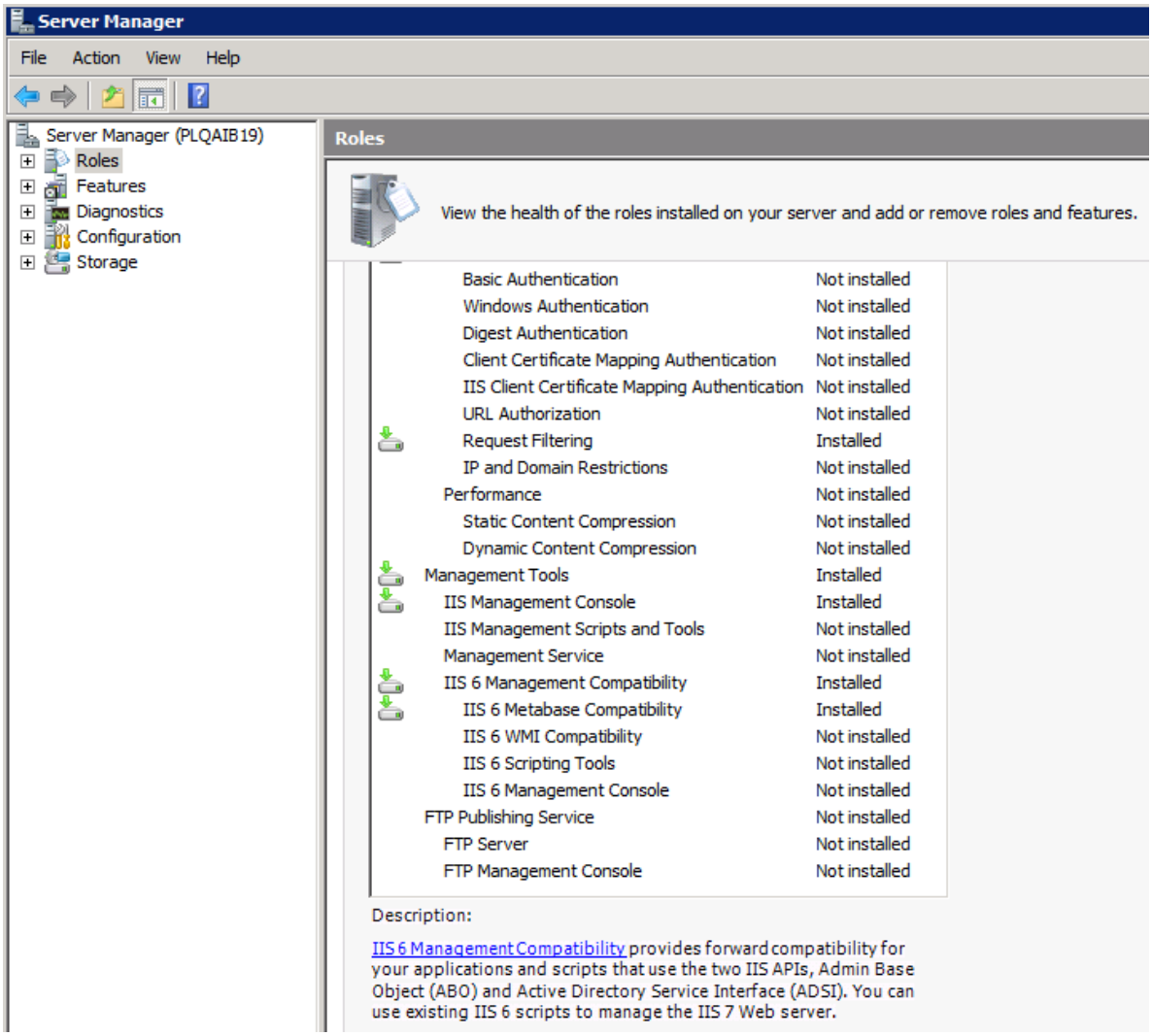


Figure 4 Adding IIS 6 Metabase Compatibility

2. Install IIS 6 Metabase Compatibility.

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.

DATABASE USER ROLES AND PERMISSIONS

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

Recommended RateManager Permissions:

It is recommended that the IBRM and IB_CLIENT database user have a database owner (db_owner) role. db_owner access is needed to execute the Insbridge stored procedures and have full access to the Insbridge schema. Disk Admin permissions are also recommended in order to create backups within RateManager.

For the IBRM and IB_CLIENT databases, if db_owner permissions are not possible, manual steps will need to be performed to update the databases. If disk admin permissions are not allowed, backups will have to be done outside of RateManager.

Recommended SoftRater Permissions:

The recommended permissions are required for new tables to 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. If the recommended permissions are not possible, manual steps will need to be performed that will allow for packages to be loaded.

SoftRater can utilize three database types, SQL Server, Oracle and DB2.

- **Insbridge SoftRater SQL Server Database**.

  It is recommended that the Insbridge login be granted permission to connect to the database engine and be enabled. It is also recommended that the Insbridge login be mapped to the Insbridge database with the db_owner role checked.

- **Insbridge SoftRater Oracle Database**.

  It is recommended that the Insbridge user be granted, as defaults, the "CONNECT" and "RESOURCE" Roles.

- **Insbridge SoftRater DB2 Database**.

  It is recommended that the Insbridge user be granted "Connect to database", "Create Tables", "Create packages" authorities.

Manual steps will be detailed out in the areas where they will be noticed.

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.

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

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

Depending on the load expected, 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.*

E-Delivery

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 RateManager 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 04.05-Insbridge-IBRU folder contents:

- **Databases**
  - DB2
    - SoftRater – IBSR
      - DDL
  - Oracle
    - SoftRater – IBSR
      - DDL
      - Update:Usp_IBSR_v04.05.00.oracle
  - SQL Server
    - RateManager – IBRM
      - Latin1_General_BIN
        - DATABASE_BACKUP_IBRM_TEMPLATE_CASE_SENSITIVE.bak
      - SQL_Latin1_General_CP1_CI_AS
        - DATABASE_BACKUP_IBRM_TEMPLATE.bak
    - Security – IB_CLIENT
      - SQL_Latin1_General_CP1_CI_AS
        - DATABASE_BACKUP_IB_CLIENT_TEMPLATE.bak
    - SoftRater – IBSR
      - Latin1_General_BIN
        - DATABASE_BACKUP_IBSR_TEMPLATE_CASE_SENSITIVE.bak
      - SQL_Latin1_General_CP1_CI_AS
        - DATABASE_BACKUP_IBSR_TEMPLATE.bak
      - Update:Usp_IBSR_v04.05.00.sql
- **IE7_IE8 Users**
  - Insbridge IE7 Active X Control Update PDF
  - RateManager_IE7_IE8.exe
- **Oracle BI Publisher**
  - OBI_PUBLISHER.exe
- **Oracle Client**
  - Oracle_client.exe
- **Oracle Insurance – Insbridge Rating and Underwriting (x64).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 04.05.00-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.

Chapter 2

FULL RATEMANAGER INSTALLATION

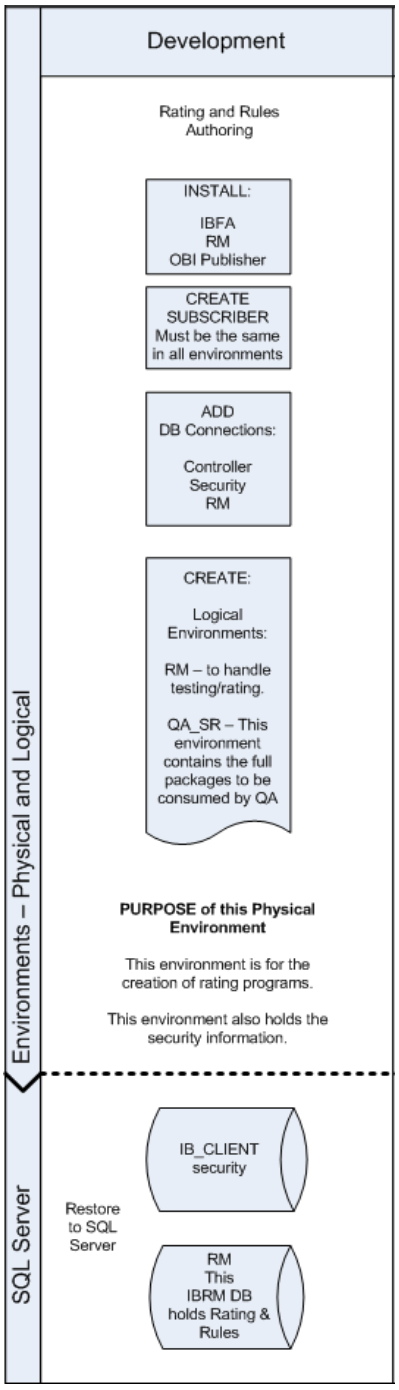
This installation will install RateManager and the Insbridge Framework Administrator (IBFA). This is for a Windows only environment, using a SQL Server database.

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. Assigning Insbridge access to the Registry.
3. Assigning permissions to the Insbridge User for the Windows Temp Folder. This is necessary for MSMQ. The Application Pool Identity must also be given permissions for the Windows Temp Folder.
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. Enter 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.
9. Install OBI Publisher.
10. Start Insbridge Message Service.
11. Login to RateManager and perform IBRU database updates.
12. Create Backup of Registry Key.

You must run as Administrator.



STEP 1 – INSTALL INSBRIDGE RATING AND UNDERWRITING

1. Begin with the **Oracle Insurance - Insbridge Rating and Underwriting Install file**. For a 64-bit installation, please make sure you have:

   Oracle Insurance - Insbridge Rating and Underwriting (x64).exe

NOTE: *The installation program requires that the installer have administrator rights on the machine where the install is occurring. You may receive a message that an unidentified program wants access to your computer. Please Allow.*

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.

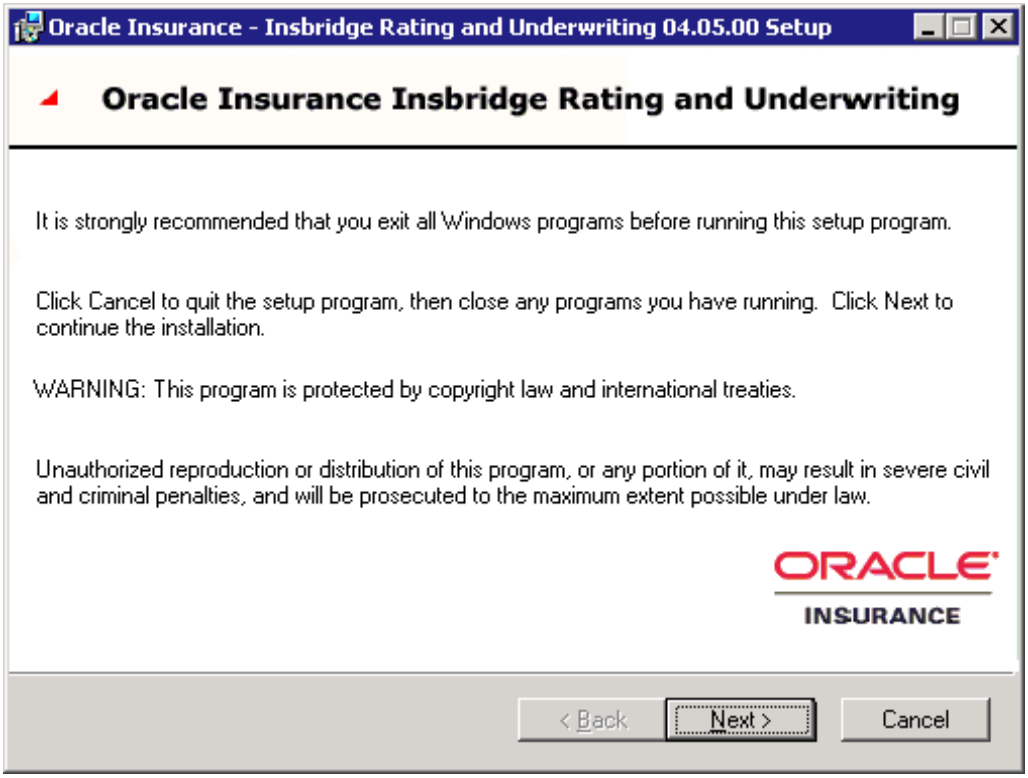


Figure 5 Installing Insbridge

3. Click **Next** to continue.

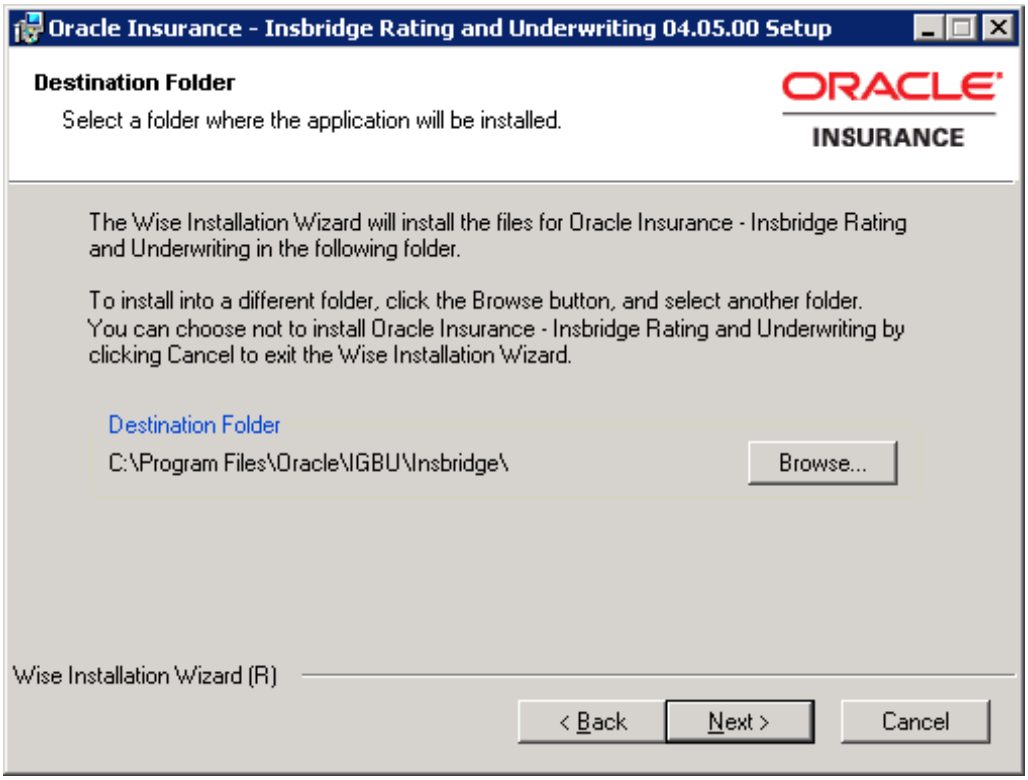


Figure 6 Entering the Destination Folder for Insbridge

4. Choose the location where the Insbridge installation will be installed. A default installation folder will be created for all new installs. This will be the location for all future installations for Insbridge applications. Select **Browse** if you want to install in a different location. After selecting a location, click **Next** to continue.

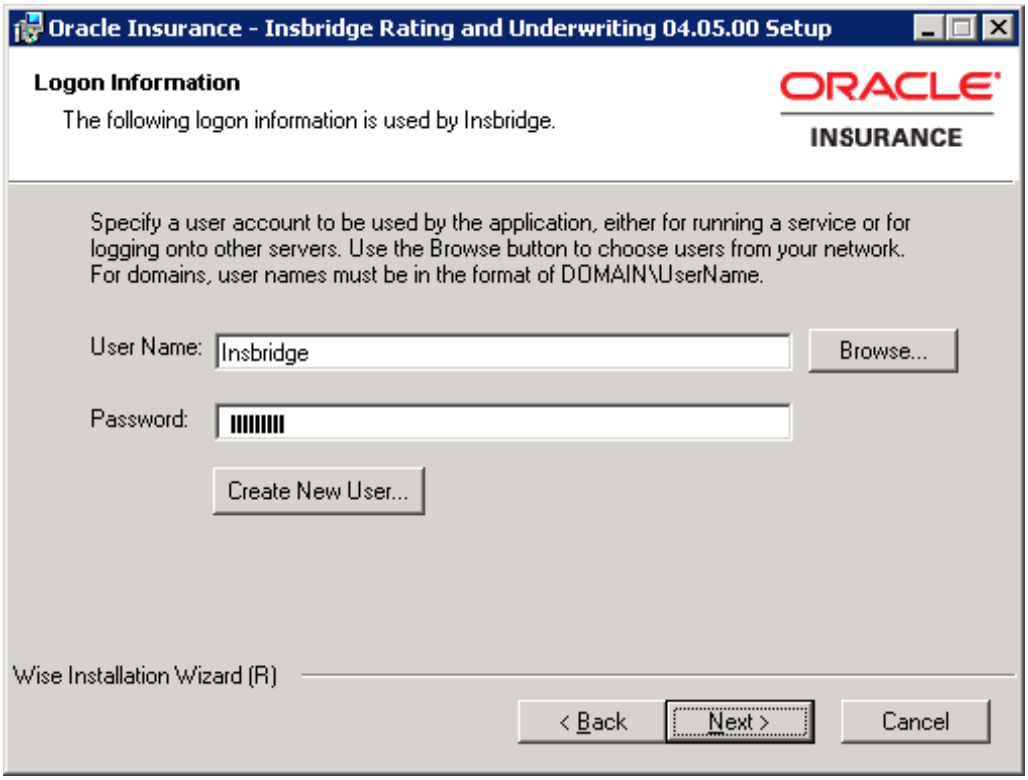


Figure 7 Logon Information

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 9.

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.

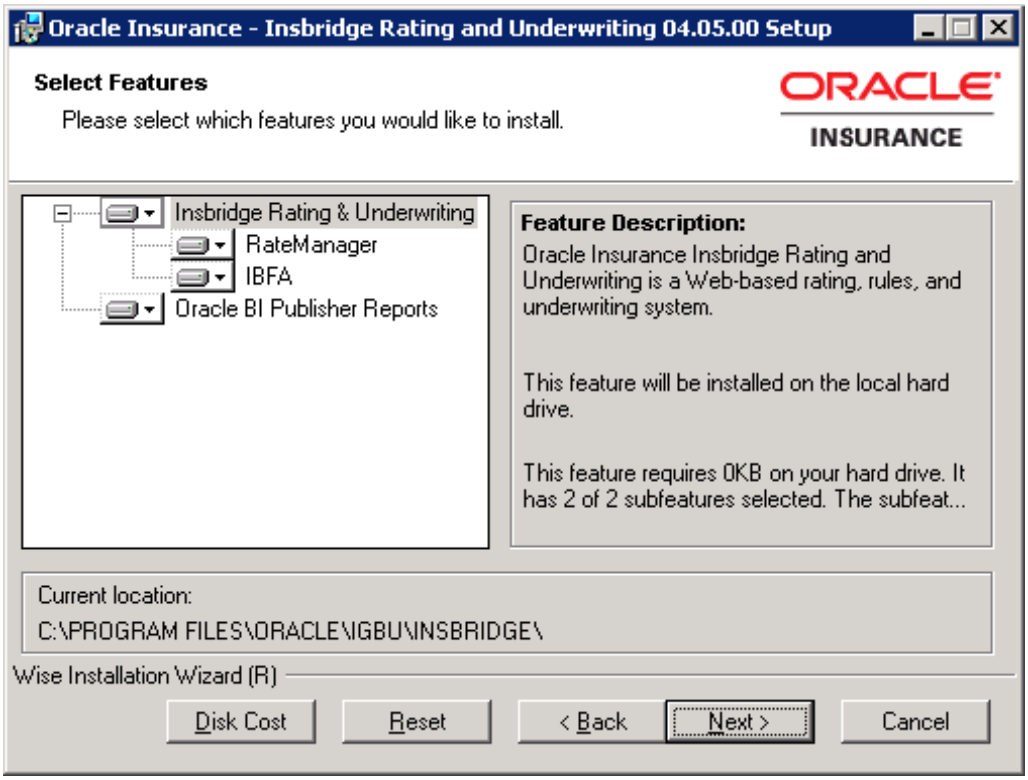


Figure 8 Selecting Features for Installation

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.

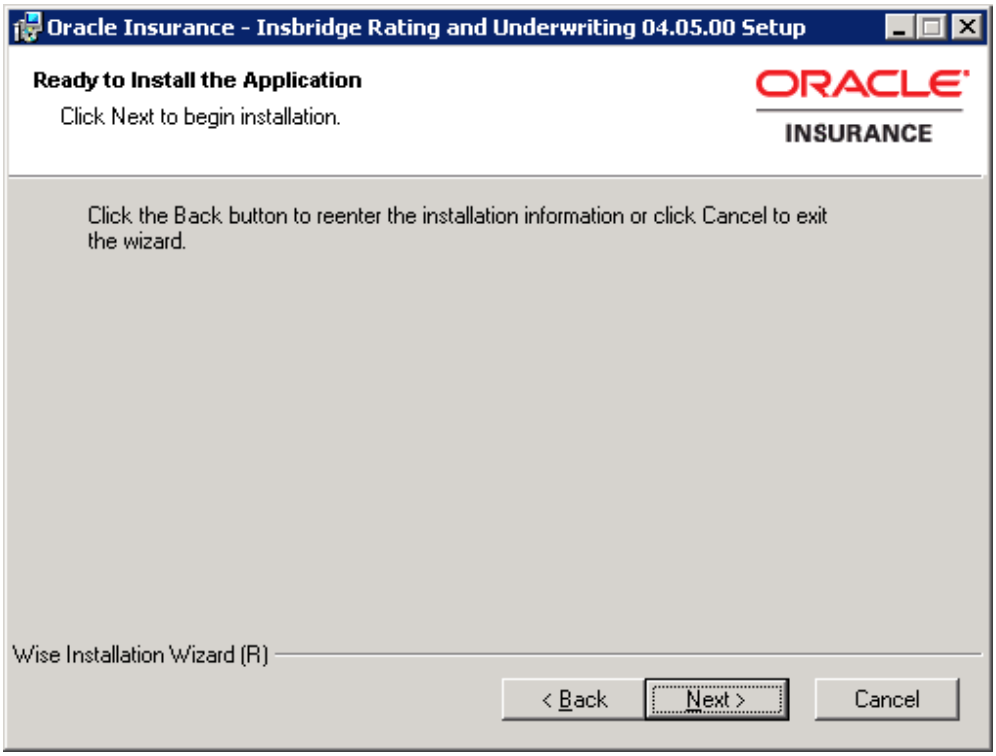


Figure 9 Ready to Install

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.

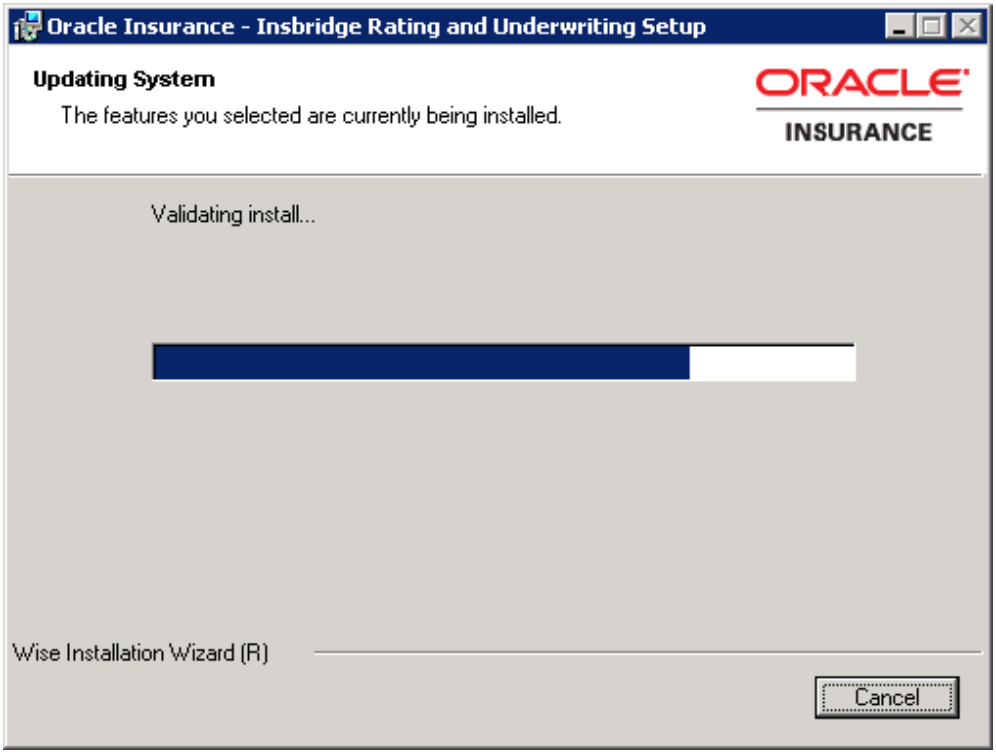


Figure 10 Installation Progress

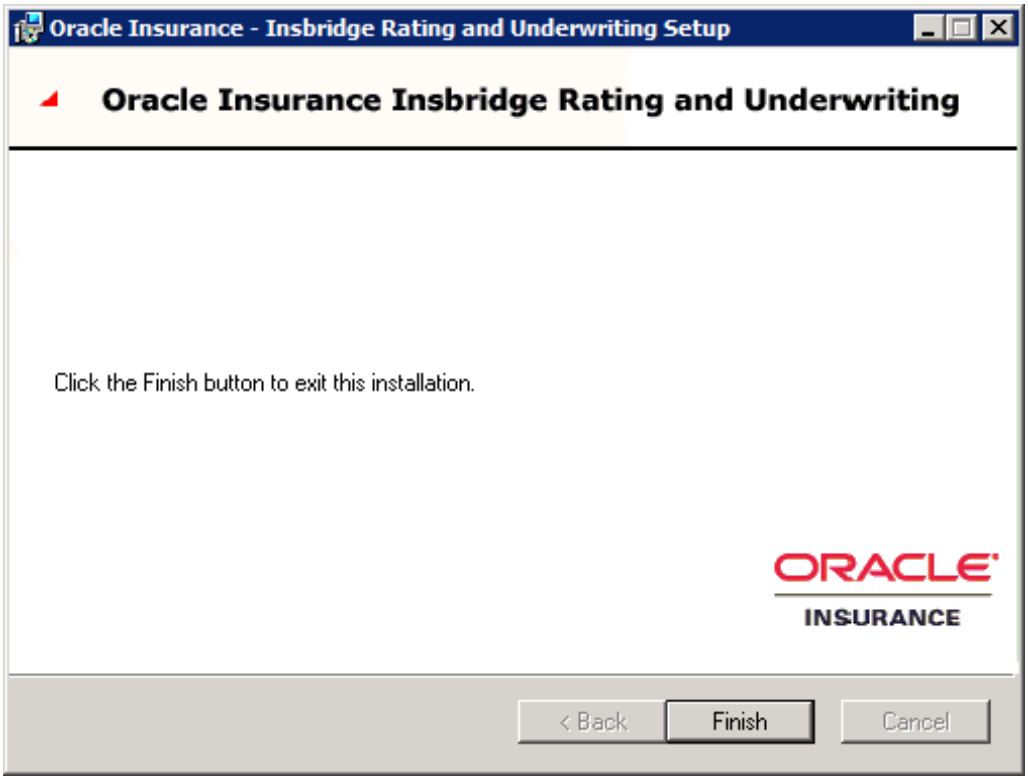


Figure 11 Install Completion Screen

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

STEP 2 – VERIFYING 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

Verifying 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.

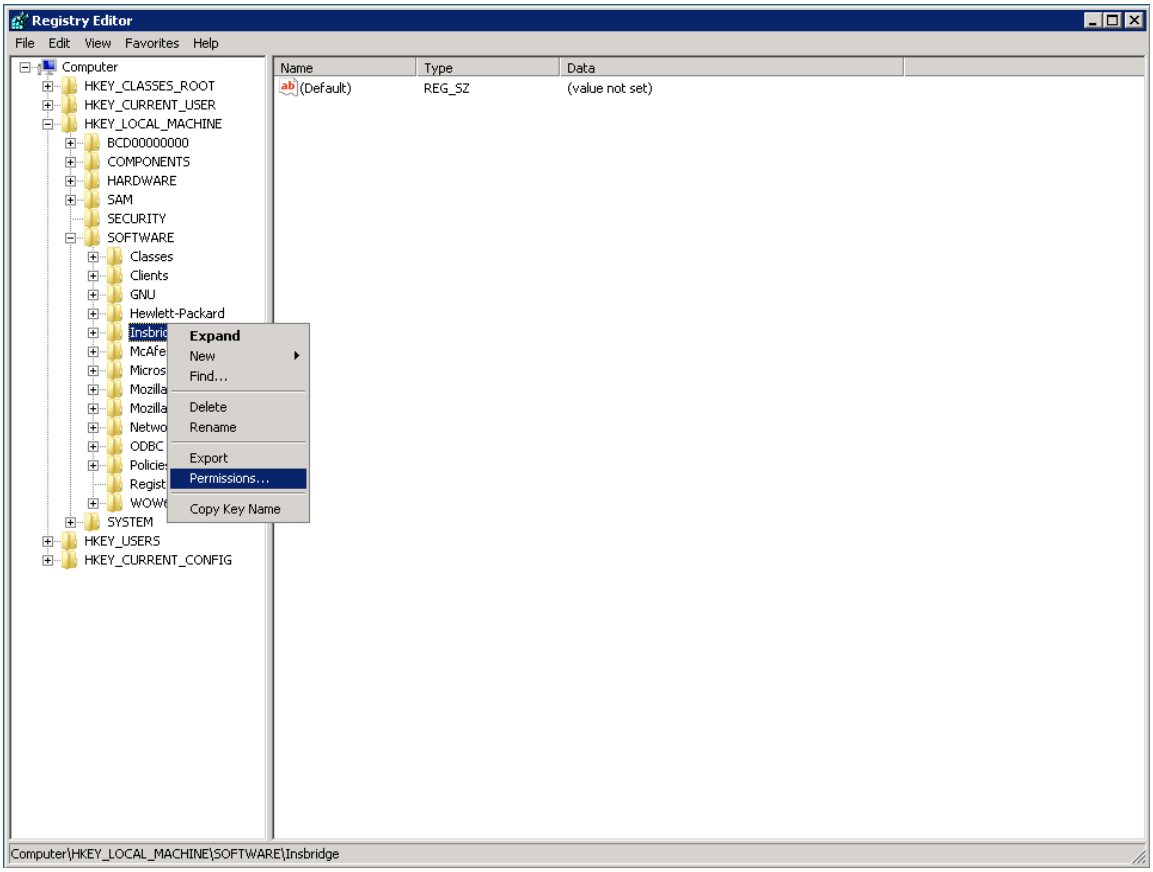


Figure 12 Configure Registry Access Windows Server

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

5. Scroll through the users. Select the **Insbridge** user.

6. Verify that the Insbridge user has **Full Control**.

7. If the Insbridge user does have Full Control, cancel out of the registry and continue with the installation.

8. If the Insbridge user does **not** have Full Control, change permissions to allow for Full Control. Save your entry and close out the registry. Continue with the installation.

9. If the Insbridge user is not listed, follow the step to add the Insbridge user.

Adding the Insbridge User:

10. From the Permissions screen, click **Add**.

11. On the Select Users or Groups popup, you can leave the defaults for the **Object Types** and **Locations** or enter the values you require.

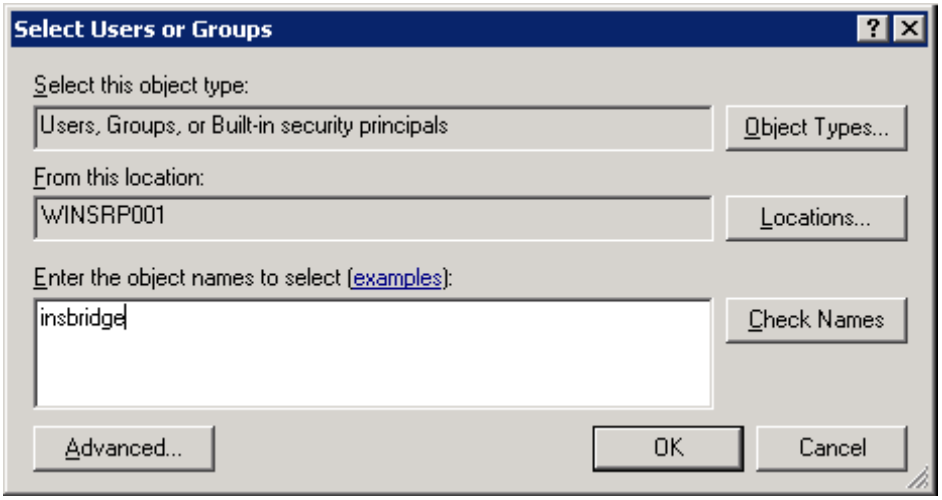


Figure 13 Entering the User

12. 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.

13. Once the name is listed, click **OK**.

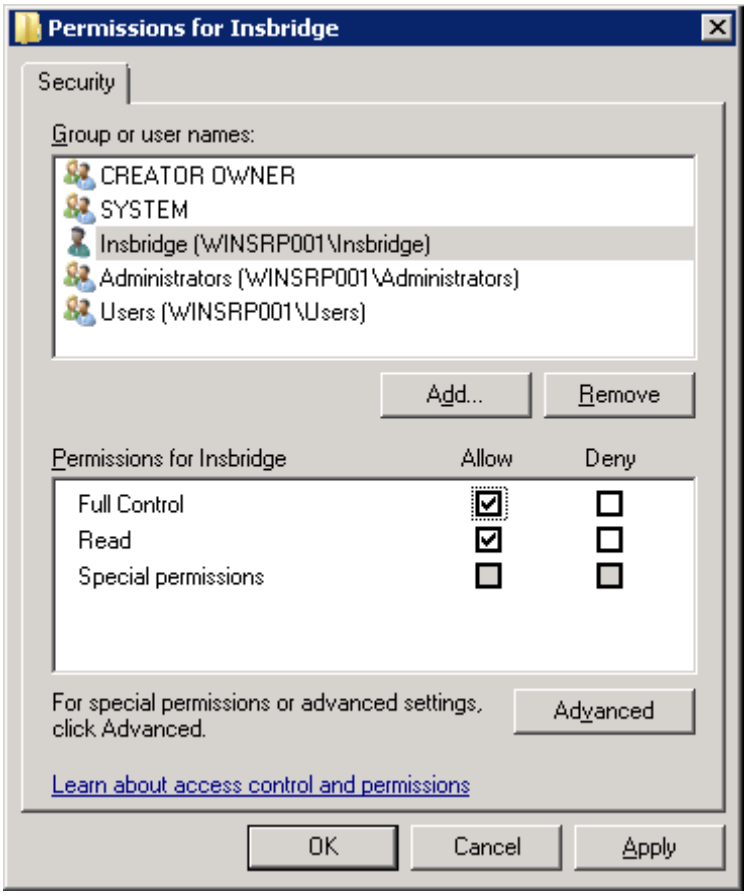


Figure 14 Applying Permissions for Insbridge User

14. On the Permissions screen, make sure the Insbridge user is highlighted and check to give **Full Control** to the entire Insbridge key.

15. Click **OK**.

16. Close the registry and continue with the install.

STEP 3 – ASSIGNING PERMISSIONS – WINDOWS TEMP FOLDER

Permissions must be assigned for the Windows Temp Folder for MSMQ and for the application pool default identity. Prior to assigning permissions, please verify the default application pool identity.

Identifying the Application Pool Default Identity:

1. Open IIS. Start→Administrative Tools→IIS Manager.
2. Expand the server and select **Application Pools**.
3. Select the **DefaultAppPool**.
4. Right click and select **Advanced Settings**.
5. Take note of the **Identity** under Process Model. This user will need to be added to the Windows Temp file. In this example, the Identity is NetworkService.

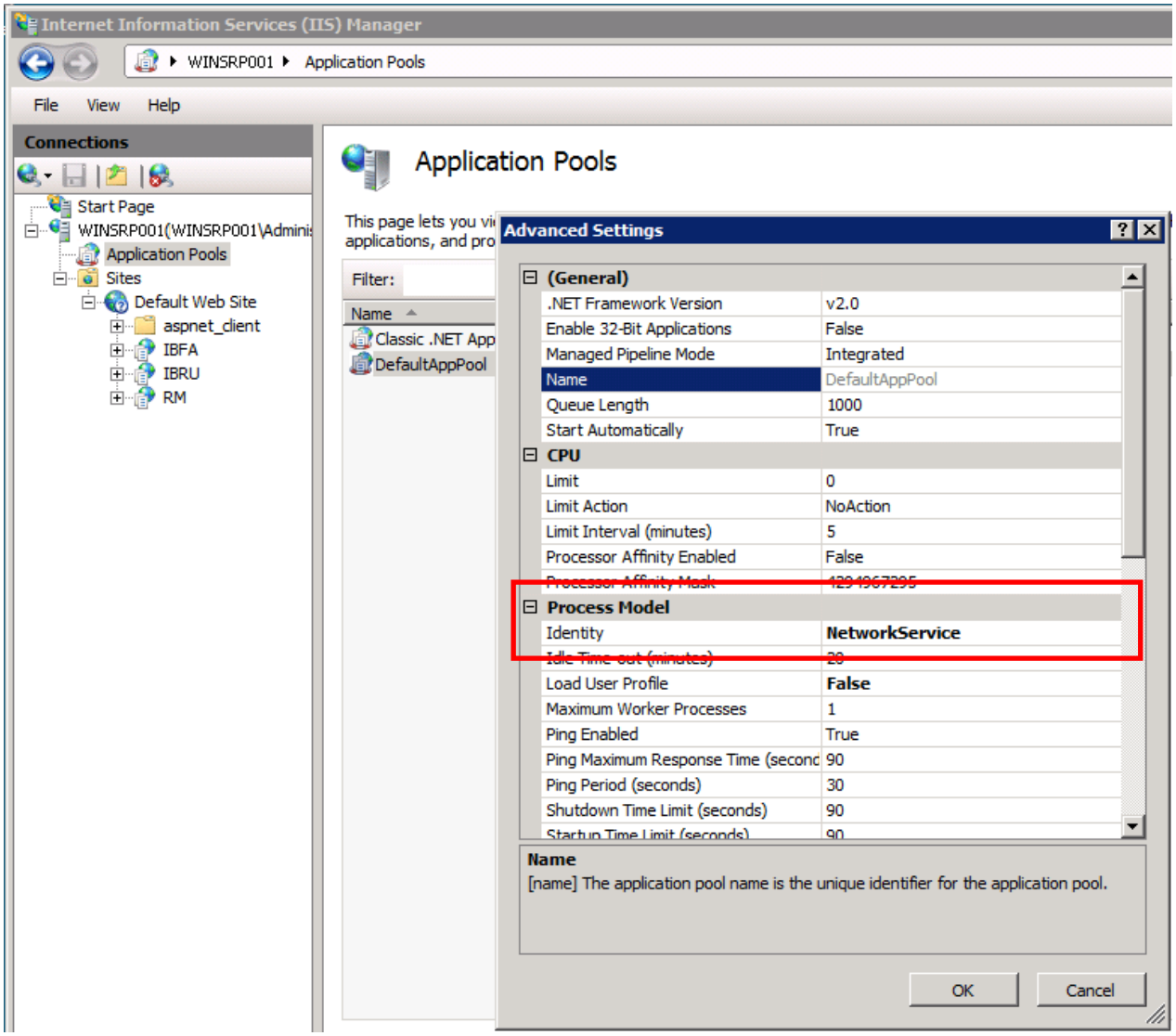


Figure 15 Verifying Application Pool Settings

6. Click **OK** to close the Advanced Settings screen.
7. Close IIS. No more information is needed from the Application Pool.

Assigning Permissions in the Windows Temp Directory:

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

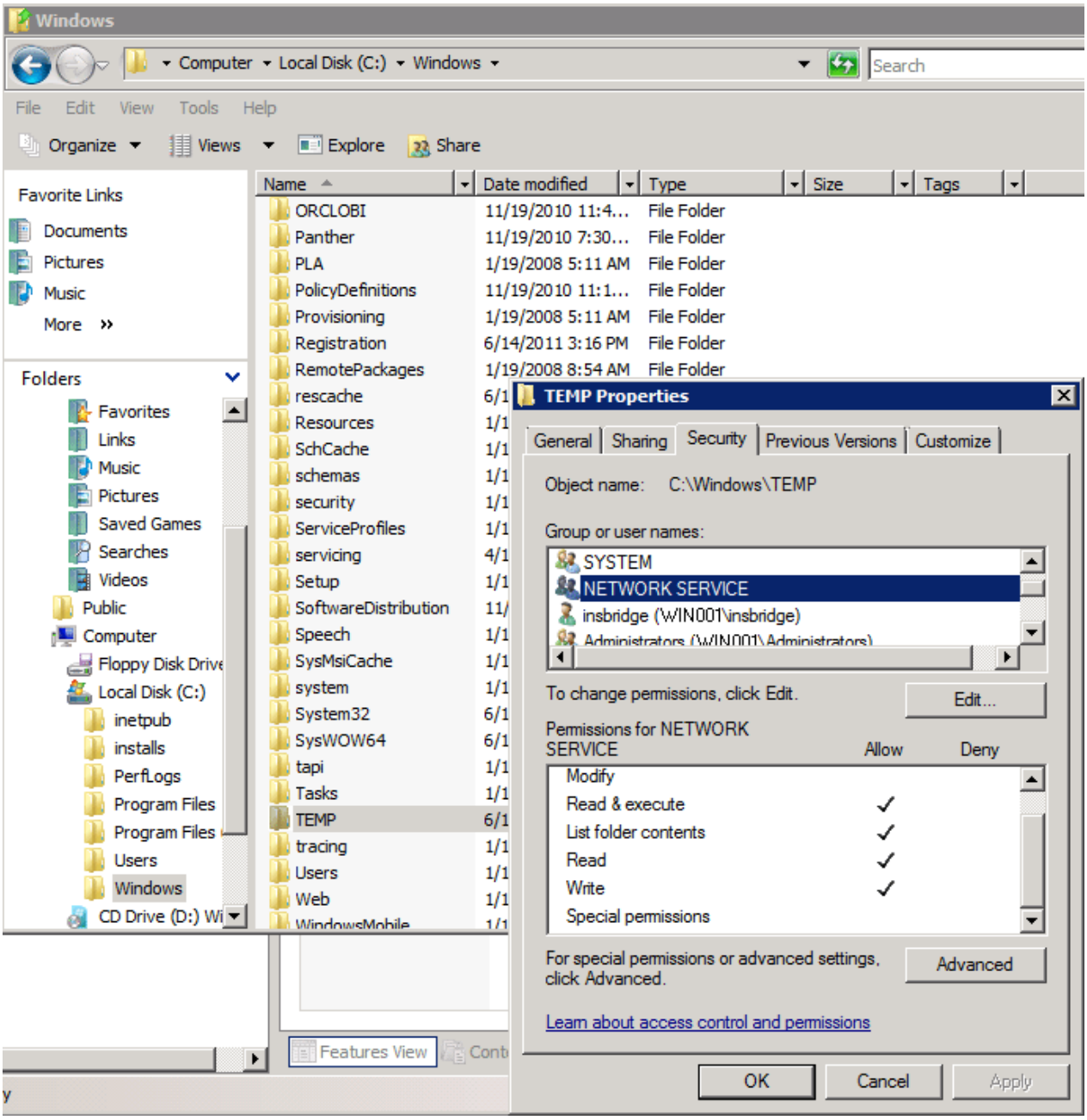


Figure 16 Assigning Permissions for the Insbridge User on Windows Temp

3. Select **Properties**. The Temp Properties screen will open.

4. Select the **Security** tab.
5. Click **Edit**.
6. On the Permissions for Temp screen, select the Insbridge user and click **Add**. If the Insbridge user is not found, cancel out and return to the Local Users and Groups area in Server Manager and verify the Insbridge user was created.
7. Update the permissions. The Insbridge user requires **Full Control**.
8. Next, add the **Application Pool identity**.
9. Update the permissions. The Application Pool identity requires the default permissions plus **WRITE**.
10. Click **OK** to close the Permissions for Temp screen.
11. Click **OK** to close the Temp Properties screen.

STEP 4 – ASSIGNING PERMISSIONS – INSBRIDGE FOLDER

Assigning Permissions for an Insbridge Folder Location

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

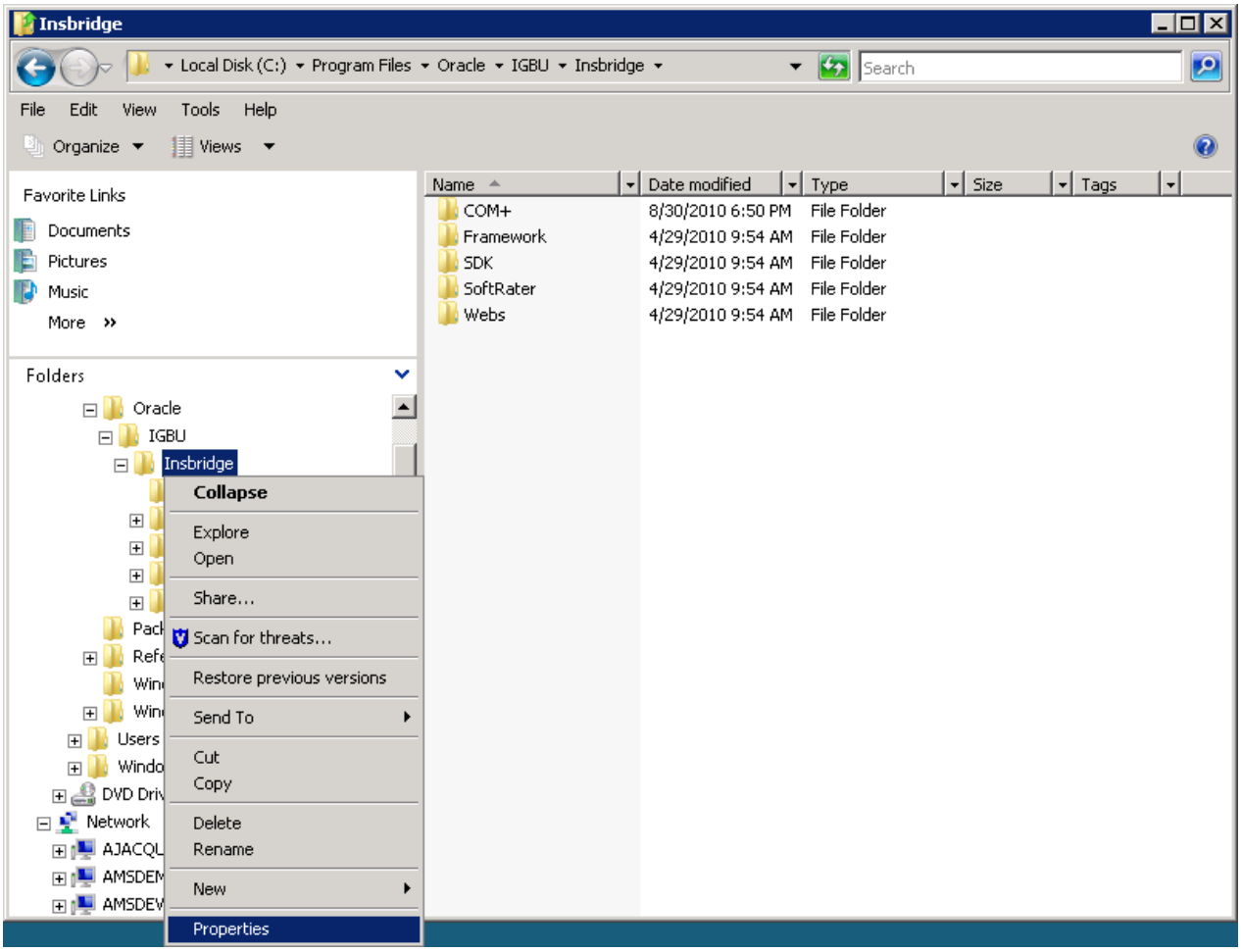


Figure 17 Assigning Permissions for the Insbridge User on Insbridge

3. Select **Properties**. The INSBRIDGE Properties screen will open.
4. Select the **Security** tab.
5. Click **Edit**.
6. On the Permissions for INSBRIDGE screen, select the Insbridge user and click **Add**. If the Insbridge user is not found, cancel out and return to the Local Users and Groups area in Server Manager and verify the Insbridge user was created.
7. Update the permissions. The Insbridge user requires **Full Control**.
8. Click **OK** to close the Permissions for INSBRIDGE screen.

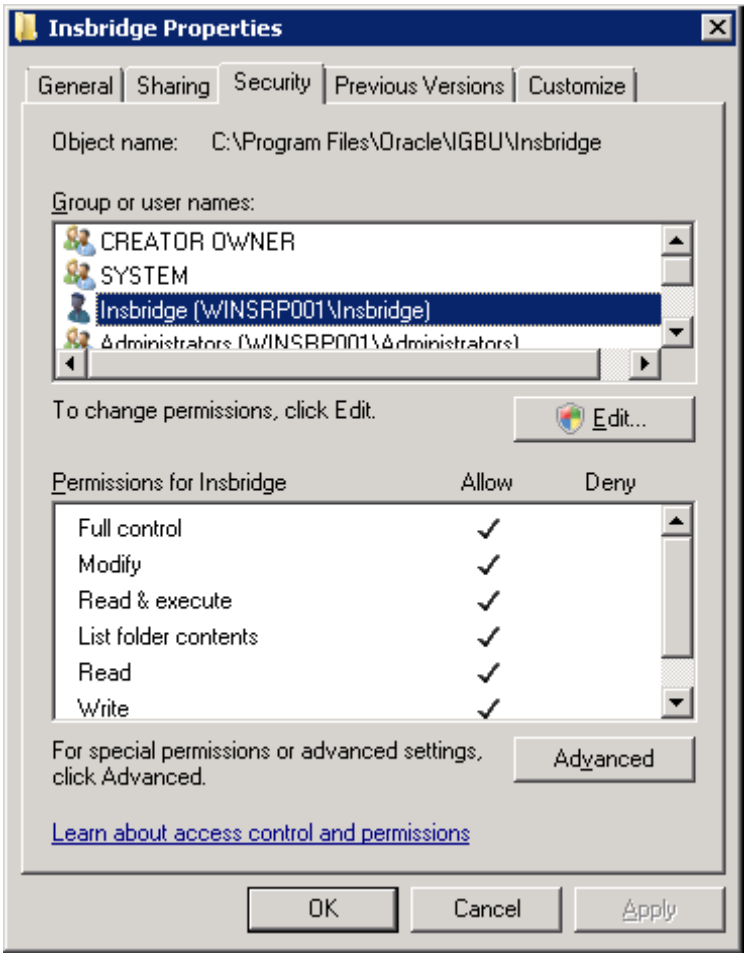


Figure 18 Setting Permission for Insbridge Folder

9. Click **OK** to close the Temp Properties screen.

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
            - Latin1_General_BIN
                - DATABASE_BACKUP_IBRM_TEMPLATE_CASE_SENSITIVE.bak
            - SQL_Latin1_General_CP1_CI_AS
                - DATABASE_BACKUP_IBRM_TEMPLATE.bak
        - Security – IB_CLIENT
            - 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.*

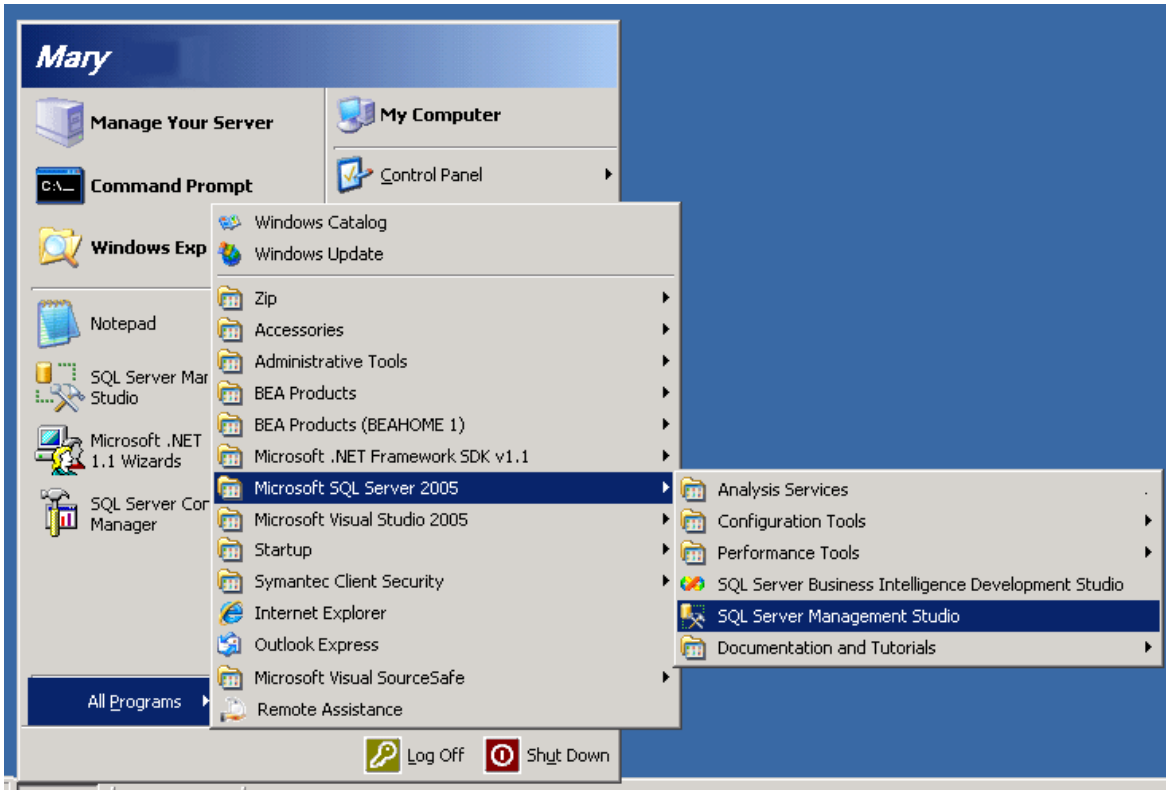


Figure 19 Restoring a Database to SQL Server

6. Go to **Databases**.

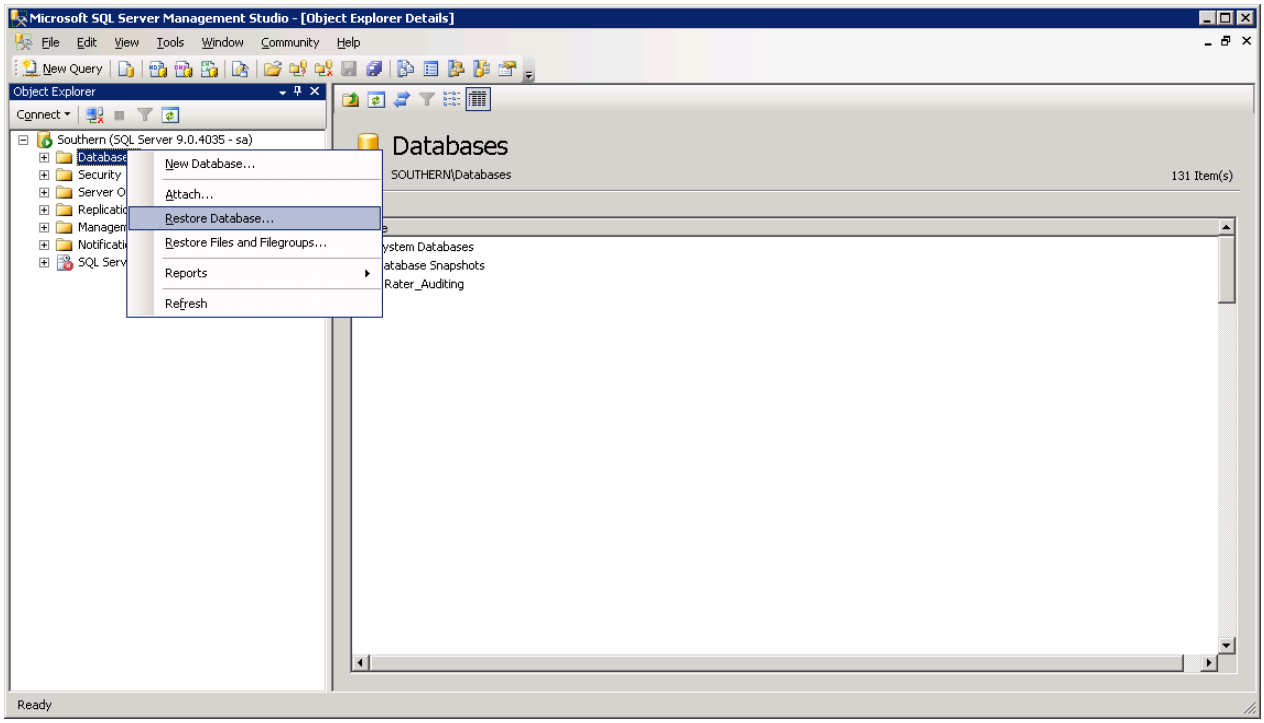


Figure 20 Right Click to Restore Database

7. Right click on **Databases**.

8. Select **Restore Database…** A separate screen will be displayed.

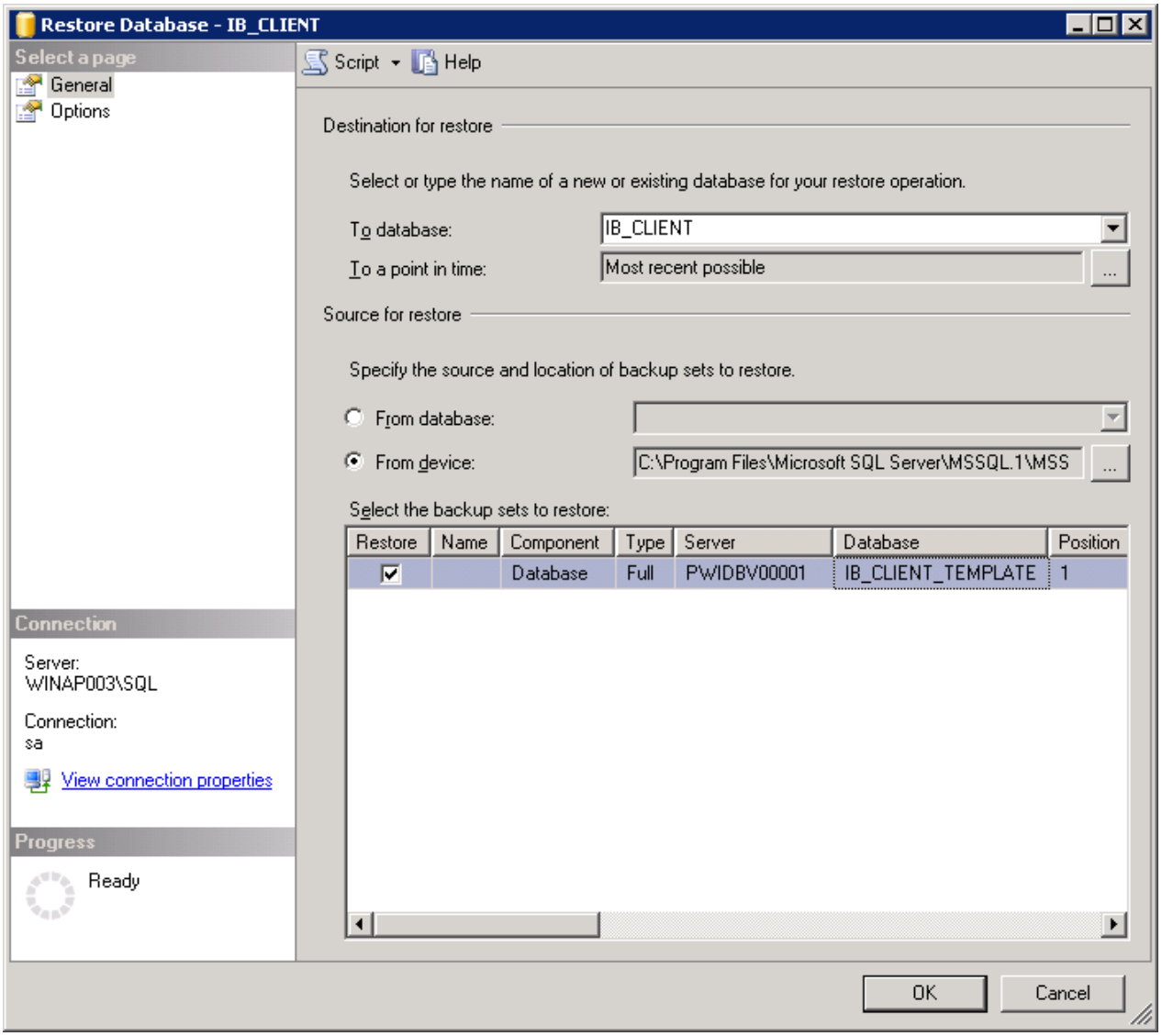


Figure 21 Restoring a Database

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 3.

11. Select your database **IB_CLIENT_** ***xxxx*.BAK**, where ***xxxx*** equals the renamed file from step 4.

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 31 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/

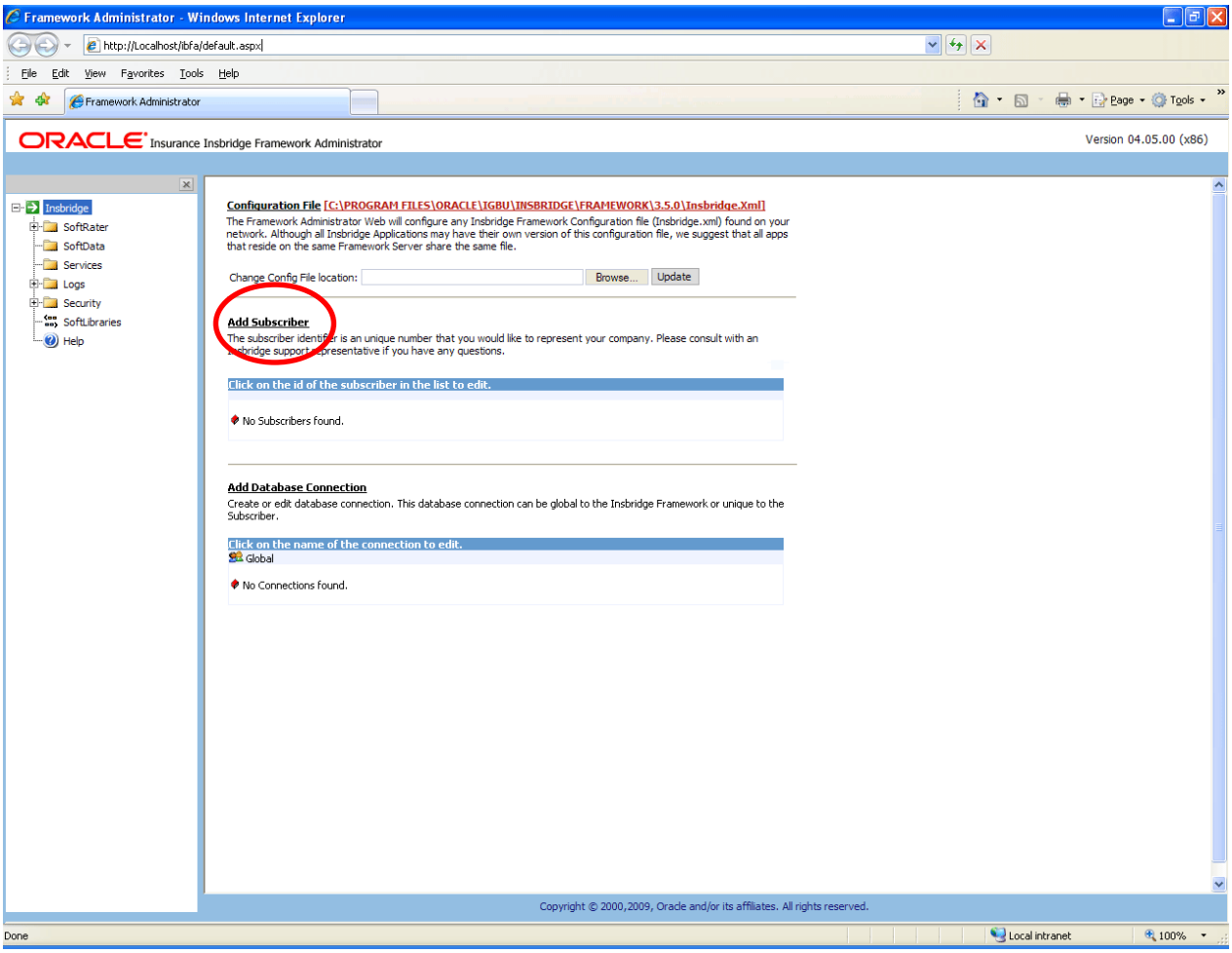


Figure 22 IBFA Home

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

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

To continue, you will need to exact names of the databases you restored in Step 5, IBRM_xxxx, and IB_CLIENT databases.

There are five steps that will need to be done in IBFA:

- **Step 1 – Creating a New Subscriber**
- **Step 2 – Adding a Global Database Connection**
- **Step 3 – Adding a Security Database Connection**
- **Step 4 – Adding an RM security Database Connection**
- **Step 5 – Creating a RateManager Environment**

Step 1 – Creating a New Subscriber:

A *subscriber* is a group or collective of users and environments under a single identity. This identity is used to manage and configure the group's activities and databases. A subscriber may be a single company, a group within a company, or a single person.

The ID, Name and Description are selected by you. The ID and Name are fixed after the first time you save. These entries cannot be edited. Only the description can be edited.

1. Click on **Add Subscriber** on the Main IBFA screen. A separate screen will be displayed.
2. Enter the **ID**, **Name** and **Description** for your subscriber.
3. When you finish entering the information, click **Save**. The new subscriber will now be displayed in the list of subscribers.

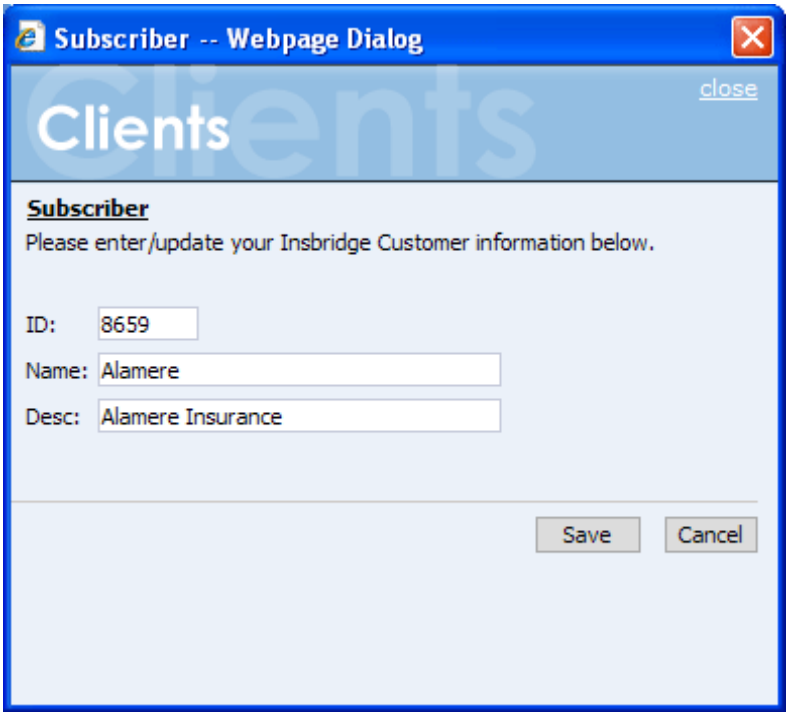


Figure 23 Enter ID

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 unique for each subscriber. 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/.

Troubleshooting Subscriber Entries:

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 Sharing and Security. Select the Security tab.
3. Add the Insbridge user.

Add Database Connections:

Stay on the Main IBFA screen. Three databases must be added to IBFA:

- Subscriber: **Global** with Name: **controller**. This is a global database and is required for logging in to the IBRU system. This is not unique to the subscriber.
- Subscriber: (**Your Subscriber Name**) with Name: **security**. This is a subscriber specific database and is required for subscriber security information.
- Subscriber: (**Your Subscriber Name**) with Name: **RM**. This is a subscriber specific database and is required for RateManager. This information will also be used when creating the RateManager environment.

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

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

Step 2 – Adding a Global Database Connection:

Begin by filling out connection information for the IB_CLIENT database using the Global subscriber.

1. From the Insbridge page, click the **Add Database Connection** link. This will open the Connection screen.

Figure 24 Setting up the Global Database Connection

2. **Select Global for the Subscriber**.

3. Enter **Controller** for the Database **Name**. The name must be Controller. This cannot be changed once you have saved it.

4. 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.

5. The **DB Server Type** is the type of server that houses the database. The controller, security and rm databases will all be SQL Server.

6. Enter **IB_CLIENT** for the **Catalog**. This is the IB_CLIENT database you restored in step 5.

7. Select the **Catalog Type**. The types available are: RateManager, SoftRater and Other. The controller and security databases will both be type OTHER. The rm database will be type RateManager.

8. Query Buffer, Tablespace and Schema are not required for the controller, security and rm databases.

9. The **User** and **Password** is for the SQL Server user (for example, insbridge) assigned as database owner on page 9 if needed.

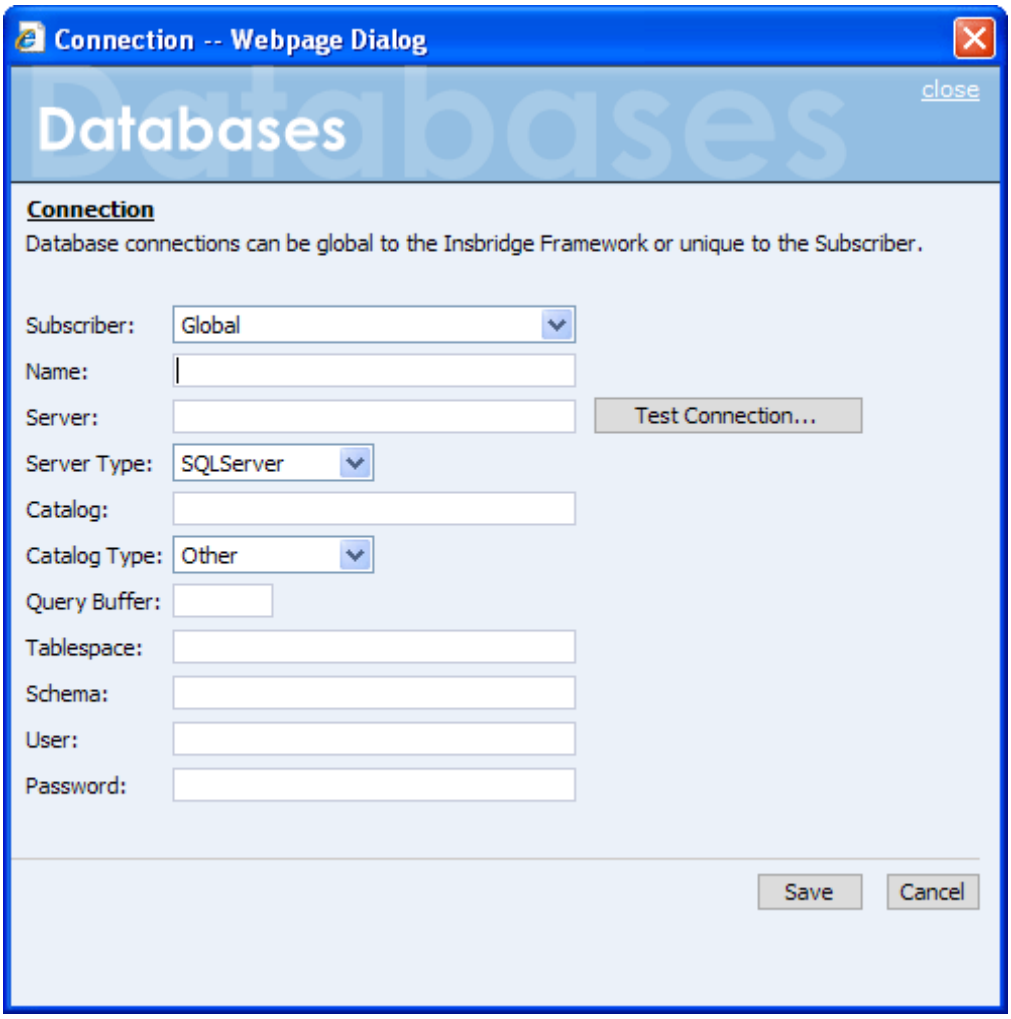


Figure 25 Adding a Database Connection

10. Click **SAVE** to save your work. You will be returned to the main Insbridge page. The controller database will be listed.

Step 3 – Adding a Security Database Connection:

1. Next, add the security database. Select the **Add Database Connection** link again.
2. **Select Your Subscriber**. The security database is unique to the subscriber.
3. Enter **Security** for the Database **Name**. The name must be Security. This cannot be changed once you have saved it.
4. 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.

5. The **DB Server Type** is the type of server that houses the database. The controller, security and rm databases will all be SQL Server.

6. Enter **IB_CLIENT** for the **Catalog**. This is the IB_CLIENT database you restored in step 5.

7. Select the **Catalog Type**. The types available are: RateManager, SoftRater and Other. The controller and security databases will both be type OTHER. The rm database will be type RateManager.

8. Query Buffer, Tablespace and Schema are not required for the controller, security and rm databases.

9. The **User** and **Password** is for the SQL Server user (for example, insbridge) assigned as database owner on page 9 if needed.

10. Click **SAVE** to save your work. You will be returned to the main Insbridge page. The controller database will be listed

Figure 26 Setting up the Security Database Connection

Step 4 – Adding an rm Database Connection:

1. Next, add the rm database. Select the **Add Database Connection** link again.

2. **Select Your Subscriber**. The rm database is unique to the subscriber.

3. Enter **rm** for the Database **Name**. This cannot be changed once you have saved it.

4. 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.

5. The **DB Server Type** is the type of server that houses the database. The controller, security and rm databases will all be SQL Server.

6. Enter **IBRM_*xxxx*** for the **Catalog**. This is the RM database you restored in step 5.

7. Select the **Catalog Type**. The types available are: RateManager, SoftRater and Other. The controller and security databases will both be type OTHER. The rm database will be type RateManager.

8. Query Buffer, Tablespace and Schema are not required for the controller, security and rm databases.

9. The **User** and **Password** is for the SQL Server user (for example, insbridge) assigned as database owner on page 9 if needed.

10. Click **SAVE** to save your work. You will be returned to the main Insbridge page. The controller database will be listed

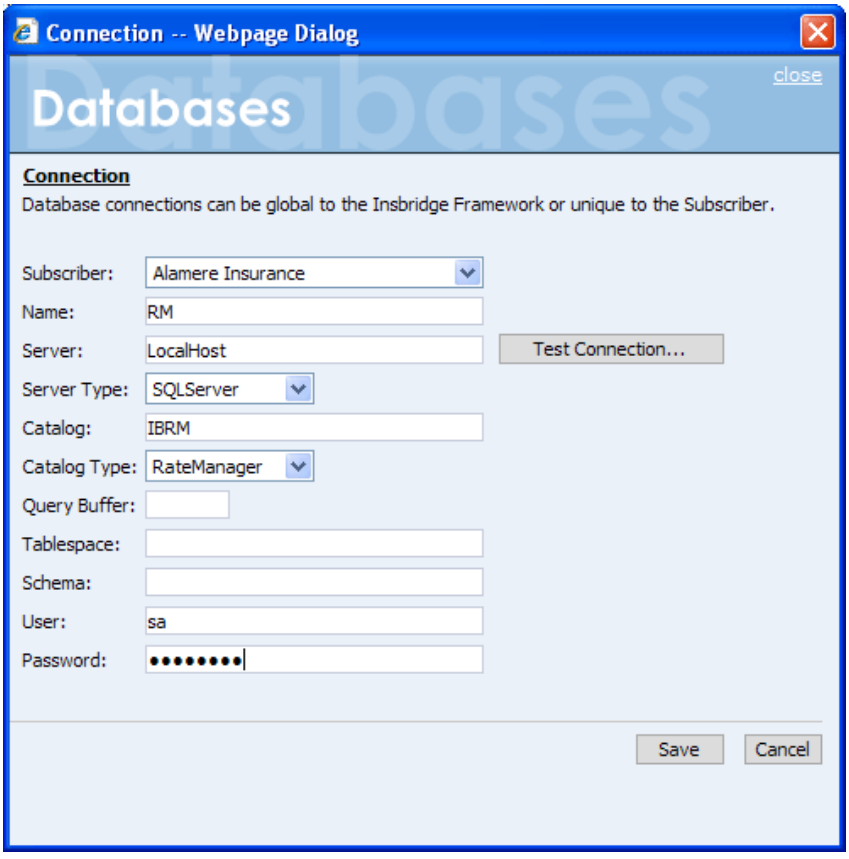


Figure 27 Setting up the RateManager Database Connection

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.*

Creating Logical Environments:

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

For a new installation it is recommended that you create one logical environment:

- RM – to handle rating and testing.

You can create additional environments at this time if necessary or you can add them in at a later time.

Step 5 – Creating a RateManager Environment:

It is recommended that only one RateManager environment be created.

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

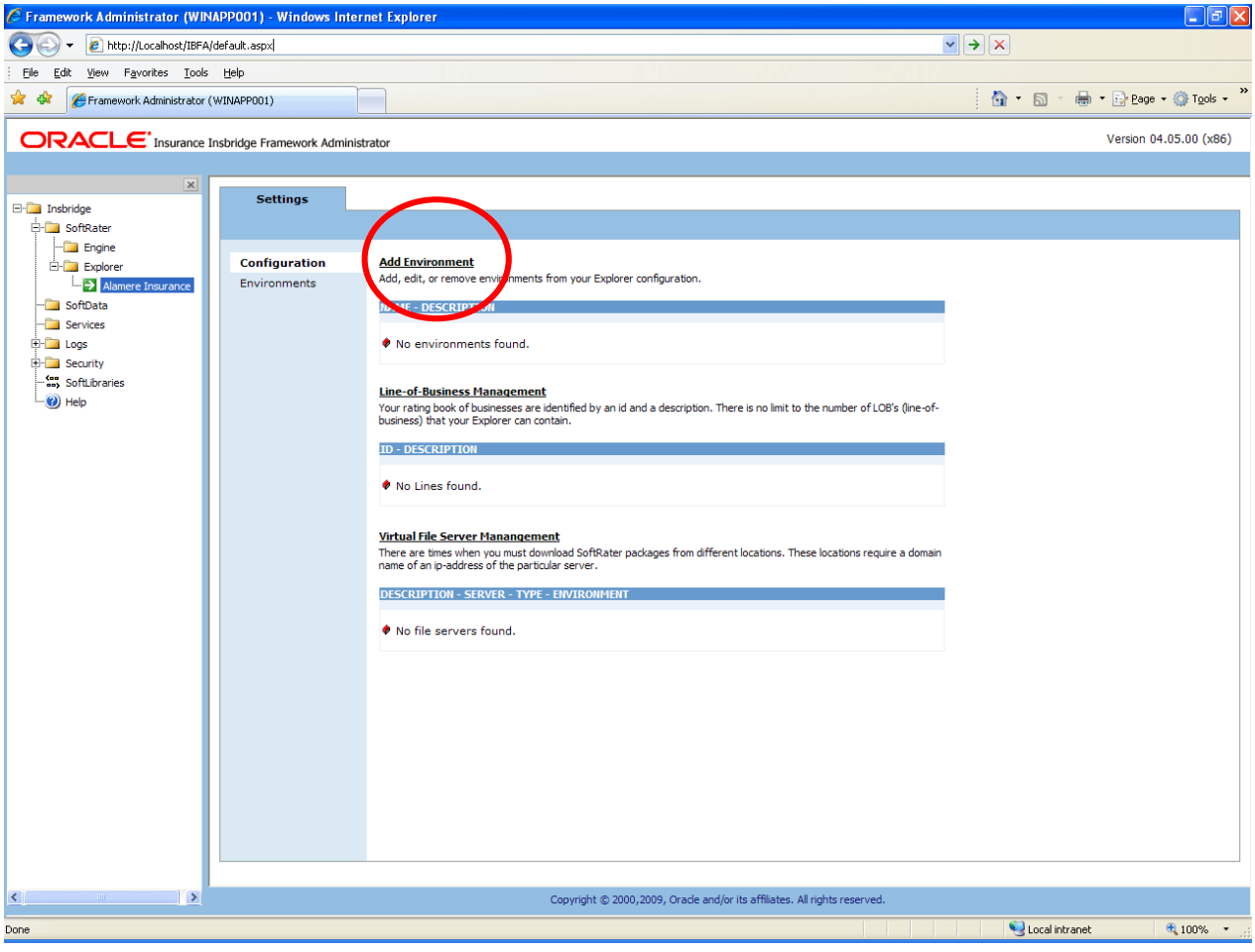


Figure 28 Create a Rating Environment

2. Click on **Add Environment**.

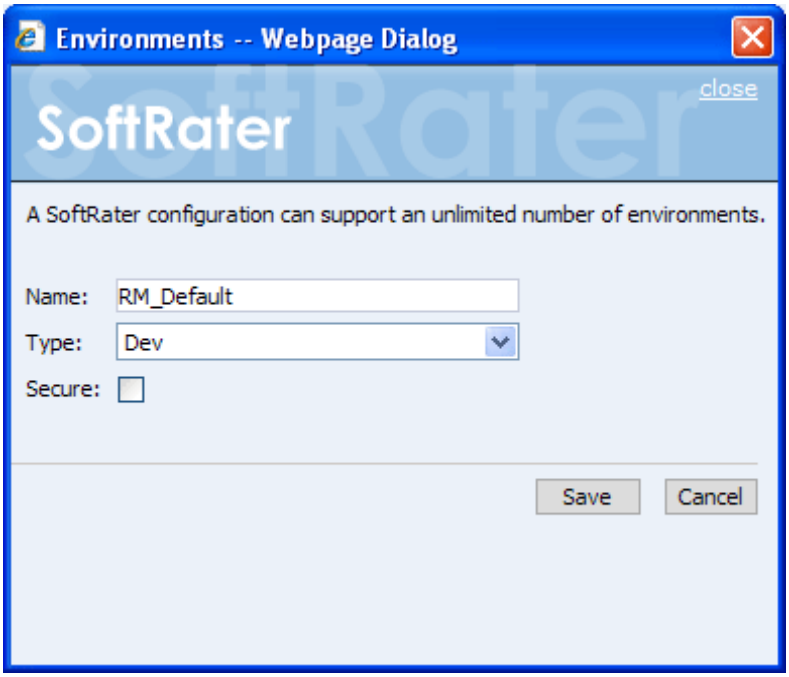


Figure 29 Entering Name and Environment

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

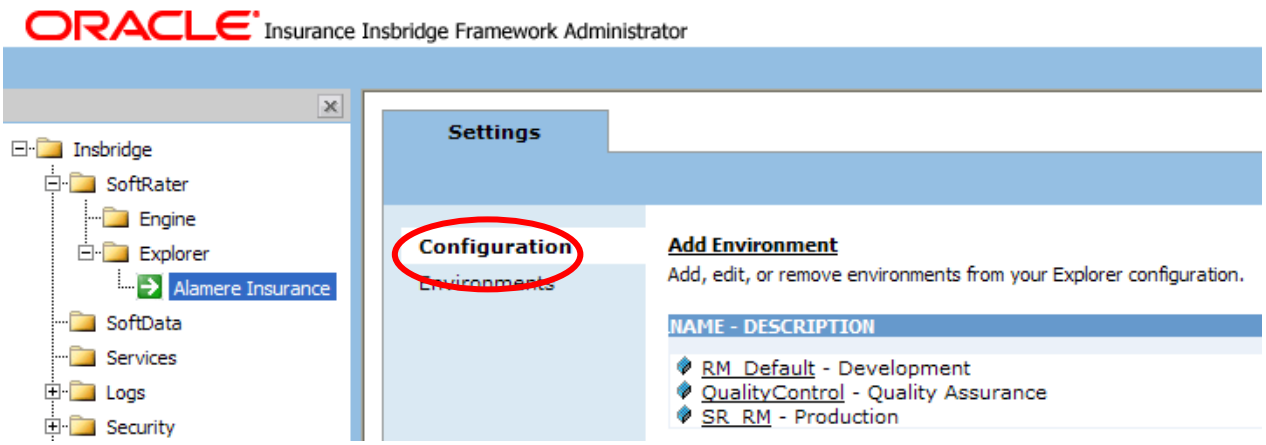


Figure 30 Obtaining Environment Information

4. Select the **Environments** link under the Configuration header on the left hand side to enter the configuration information for the newly created logical environment. You will be placed on the Environments screen. The environments you previously setup will be listed. If an environment is missing, you must return to the Configuration subtab and add it.

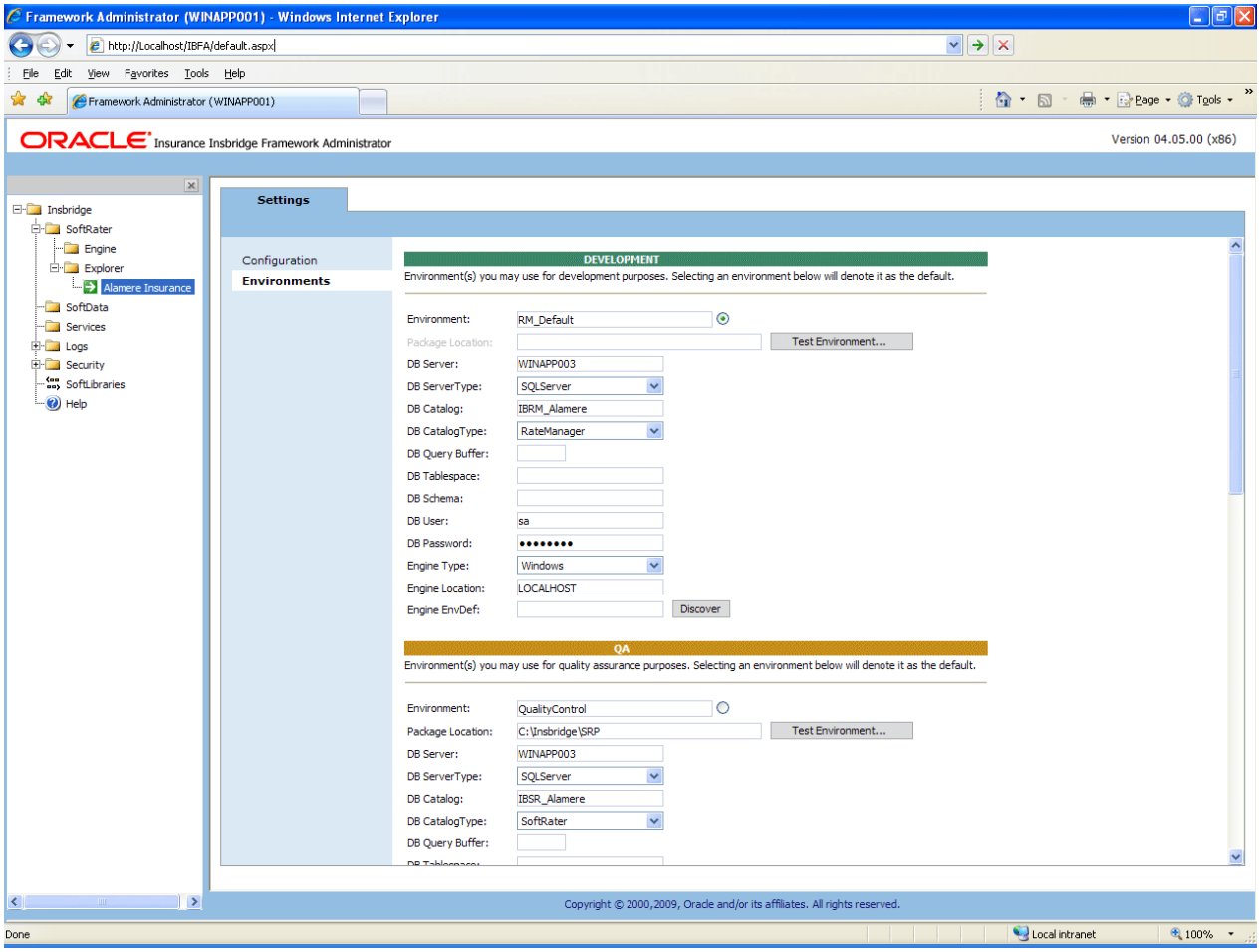


Figure 31 Editing Environment

5. The **Environment Name** will be complete. No changes are needed.

6. RateManager environments will not have a **Package Location**. No entry will be allowed.

7. Enter in the **DBServer** name or IP address. This is the database server where the RateManager database was restored.

8. The **DB Server Type** will be **SQL Server**.

9. The **DB Catalog** is the name of the RateManager database restored in SQL Server.

10. The **DB Catalog Type** is **RateManager**.

11. **DB Query Buffer**, **DB Tablespace** and **DB Schema** are not required for a RateManager environment.

12. Enter the **DB User** name and **Password**.

13. The **Engine Type** is **Windows**.

14. The **Engine Location** default is **LOCALHOST**. Most RateManger installations have a local engine location. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located. Do not change LOCALHOST to the name or IP address of the local machine.

15. The **Engine EnvDef** default is a blank field. Most RateManger installations do not require an entry in this field. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located.

16. Click **Save** to save your entries. After you have saved your settings, a new tab will be displayed, Content. This tab will not be needed for a new installation.

    No further entries are required at this time. If you want to make additional entries you can. Additional environments can be added at any time.

    If you are running a Windows only environment you can set up your SoftRater databases at this time. Please see Chapter 4 Creating a SoftRater Environment for instructions.

STEP 7 – VERIFYING THE COMPONENT SERVICES

Next, you should verify the component services.

1. Click **Start→Administrative Tools→Component Services**.
2. Expand the **Component Service**s 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.

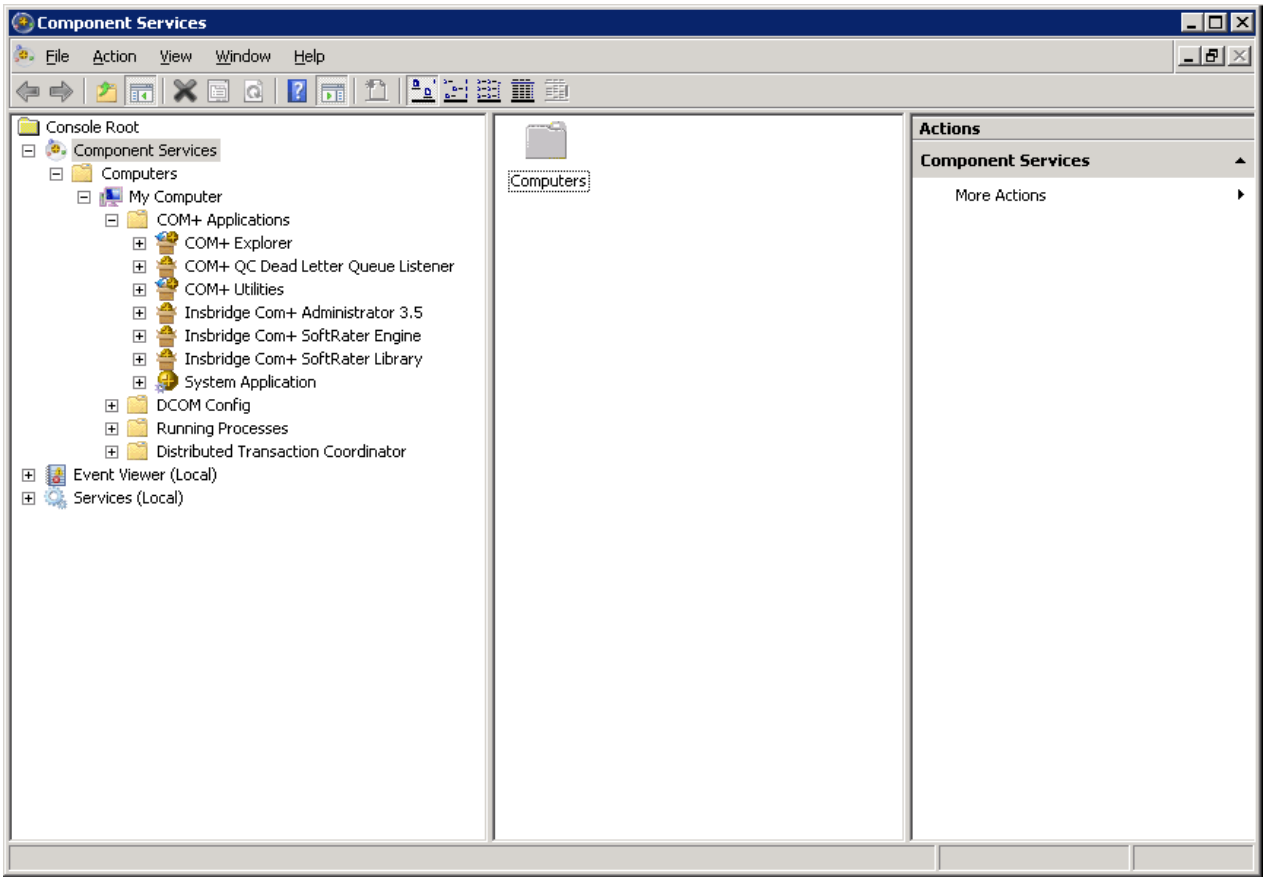


Figure 32 Component Services

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.

STEP 8 – ALLOWING FOR WCF ACTIVATION

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.

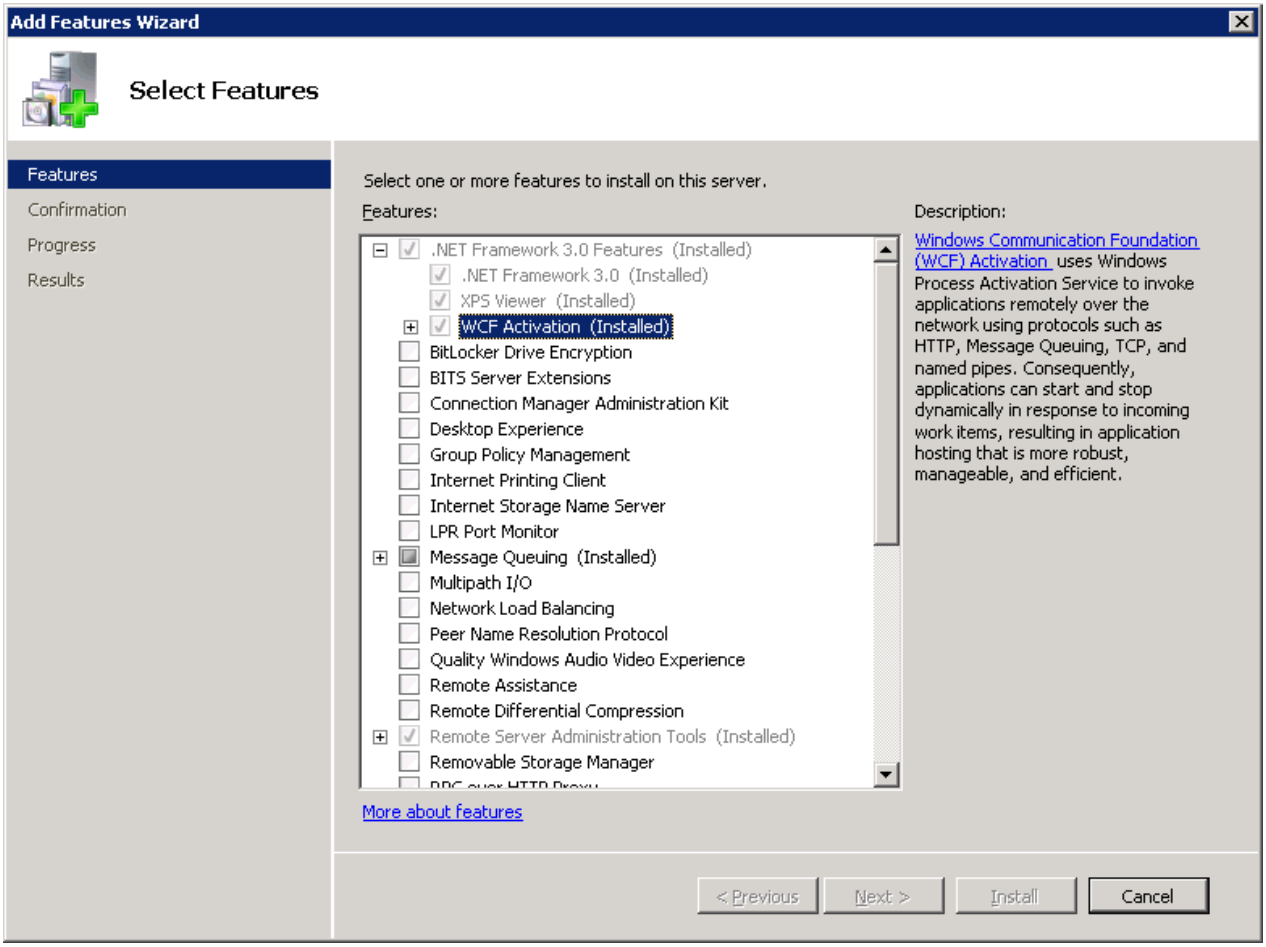


Figure 33 Selecting WCF Activation

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

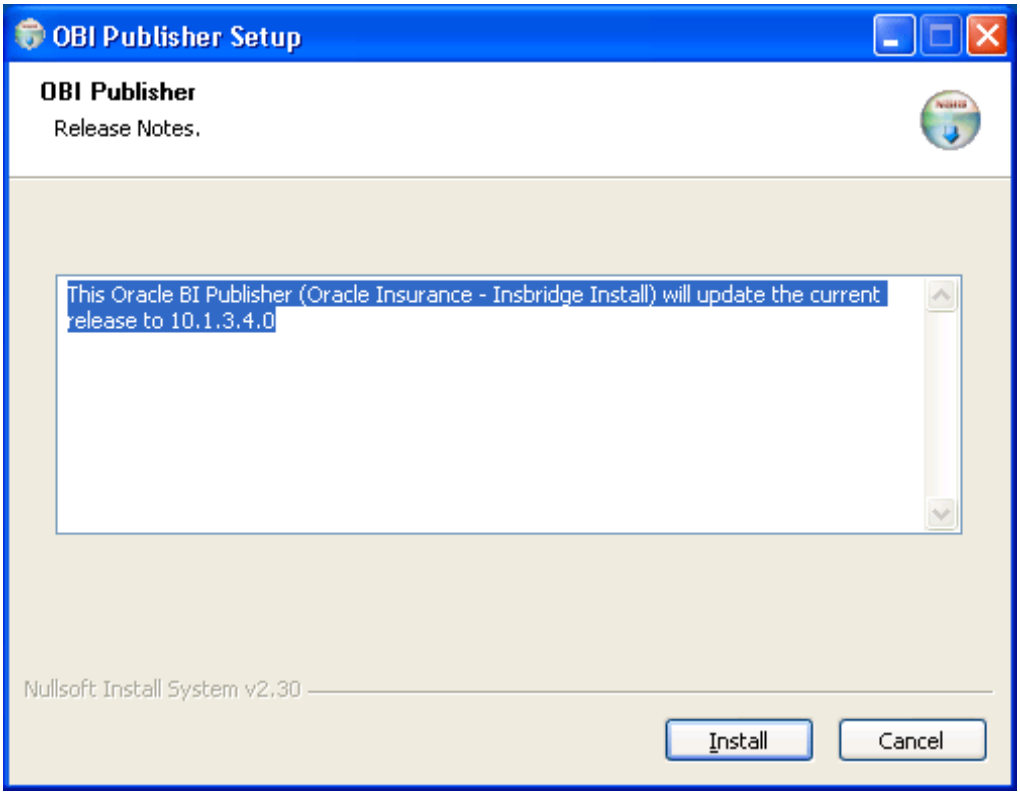


Figure 34 Installing OBI Publisher

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 the Server Manager.

STEP 10 – 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.

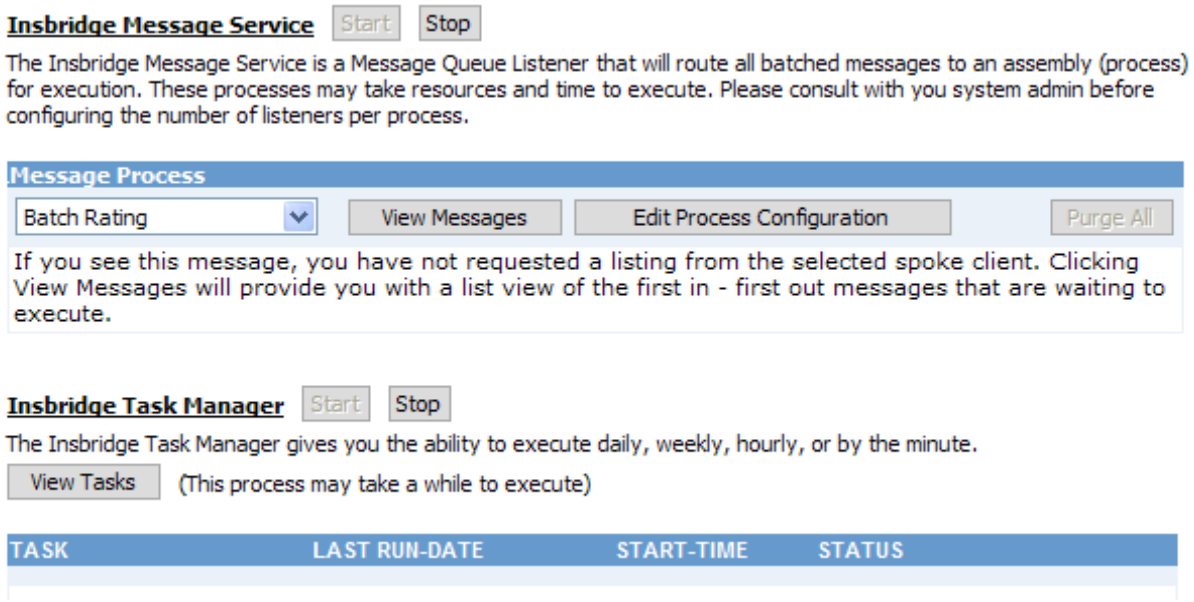


Figure 35 Insbridge Services Screen

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

STEP 11 – PERFORMING UPDATES IN RATEMANAGER

There are two updates that should be done in RateManager prior to creating user groups and users:

- Step 1 – Running Database Updates
- Step 2 – Updating Preferences

Entering RateManager:

The URL for RateManager will be http://INSTALLATIONSERVERNAME/RM. Where the **INSTALLTIONSERVERNAME** 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. If you have created only one company, a drop down menu will not be presented.
2. The user name is demo.
3. The password is password.

After running database updates, it is recommended that you update the demo user password.

Users and User Groups can be created after any database updates are run and preferences have been set. For more on user management, please see the RateManager Tools 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.

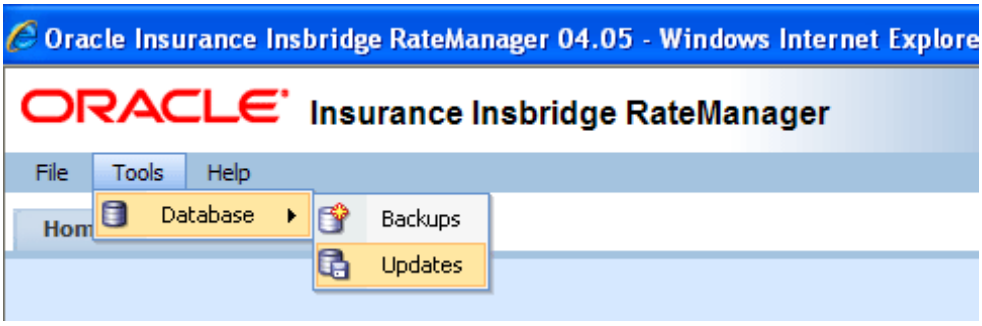


Figure 36 Tool Mandatory Update

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. Current updates can be re-run if necessary. 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.

New installations may show 04.05 as current but still have only the Tools option available. You may have to run the current script again. To see if you have complete access to RateManager, click File→Reload to refresh the system.

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

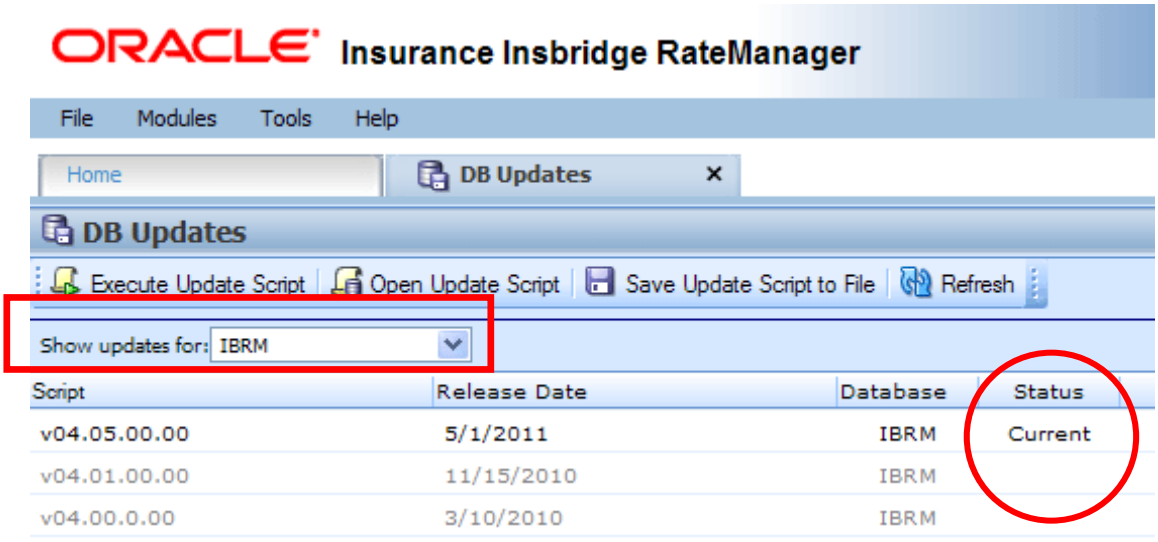


Figure 37 Available Updates

3. There are two ways to execute an update:
    a. **Directly in RateManager**
    b. **In SQL Server**

Directly in RateManager

This is recommended way to update a database. It is recommended that you start by selecting the update showing Current. This will assure that the database showing as Current will have all possible updates.

1. Highlight the update you want to run.
2. Click **EXECUTE UPDATE SCRIPT**. A warning message will be displayed.
3. Click **OK** to run the update or **Cancel** to return to the previous screen.
4. Do this for both the IBRM database and the IB_CLIENT database.
5. Click File→Reload to refresh the system.

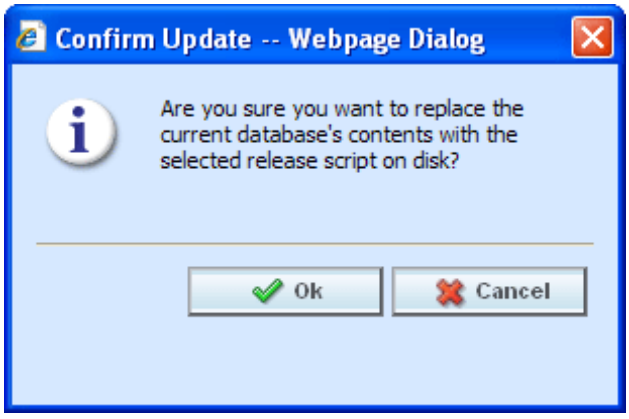


Figure 38 Updating Scripts in RateManager

In SQL Server

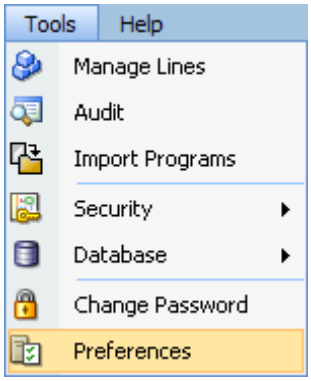
This method should be performed by a database administrator. No warning message will be displayed if you execute scripts in the wrong order. You must know the name of the databases you are updating. Please see **Manual Updates to the IBRU Database**.

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**.

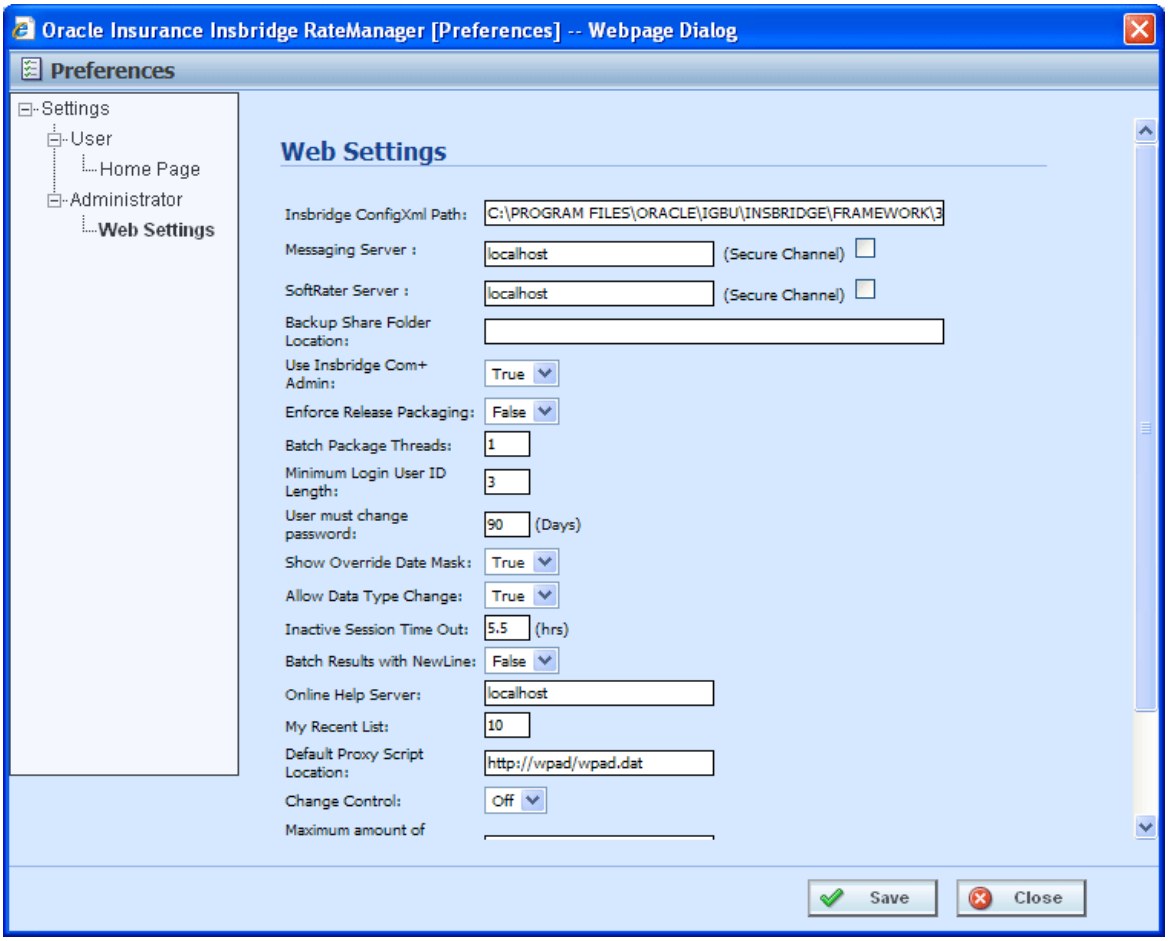


Figure 39 Preferences Settings

3. Make any necessary changes. If you do not know all the settings, you can come back and edit lat 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.

STEP 12 – 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.

This is a safety precaution and will not affect users currently accessing the IBRU system.

If you have to move RM/IBFA to a new machine or in the event of a catastrophic server failure, where the RM/IBFA server is non-recoverable, the IBRU system will need to be reinstalled. When RM/IBFA is re-installed on a new server, a new registry key will be created. The new registry key will not match the registry key associated with any packages that have been created. In order to load packages to the new server, you will need to restore the previous registry key.

You may also be requested to send to your registry key to support.

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.

At the completion of this step, you may enter RateManager and begin working.

Chapter 3

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 04.01 to version 04.05.00 only. To go from a lower version up to 04.05.00, you must enter RateManager.**

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.

NOTE: *If you need to go from an older version, such as 03.13, it is strongly recommended that you enter RateManager and run the 04.00, 04.01 and 04.05 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 R4.0 update would be: usp_IBRM_R040.sql. For IB_CLIENT scripts, it is recommended that you rename the file to usp_IB_CLIENT_R0(version number).sql. For example the R4.0 update would be: usp_IB_CLIENT_R40.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.

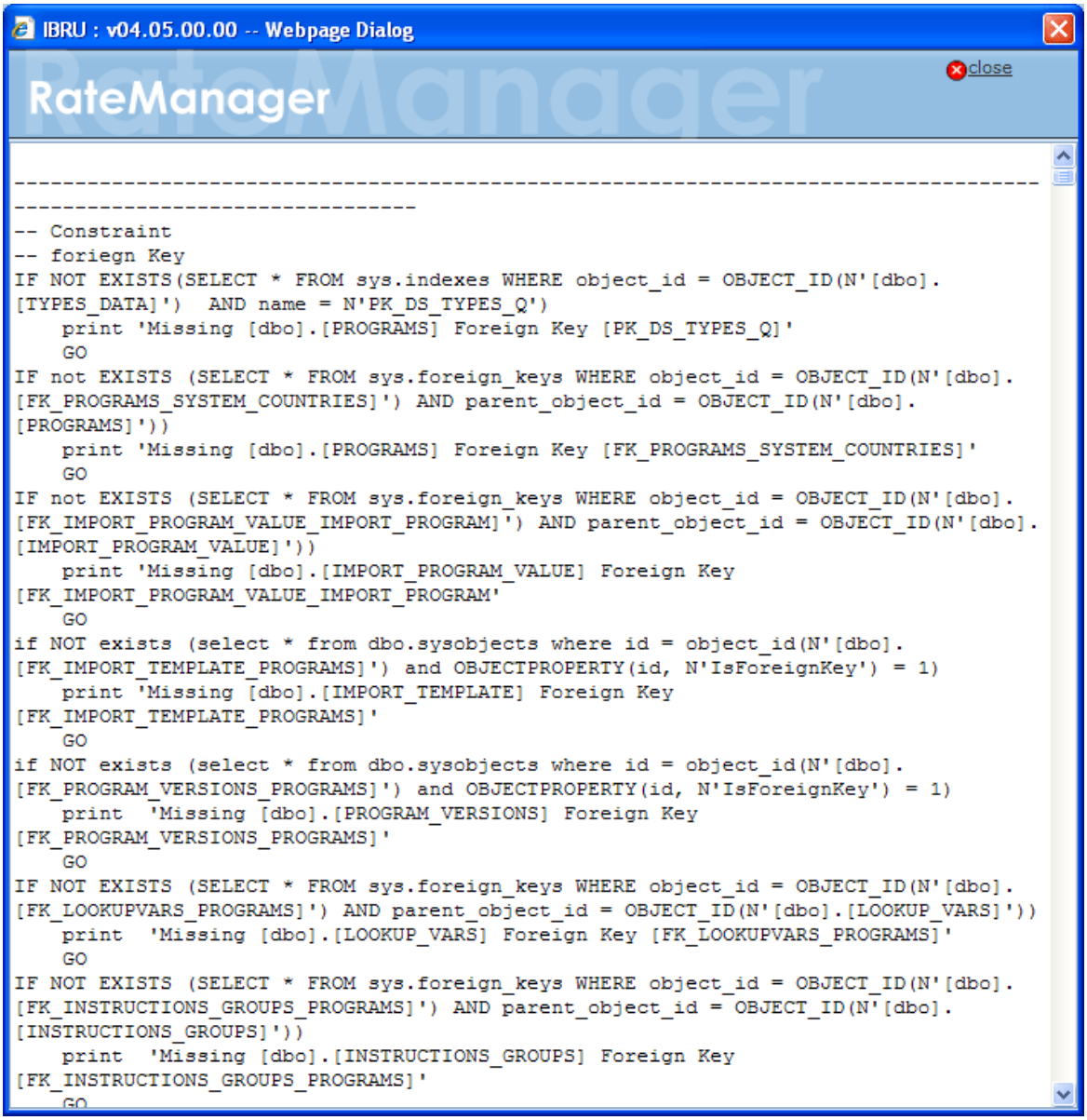


Figure 40 Script Viewer

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 R3.13 to 04.05.00, open 04.00 first.

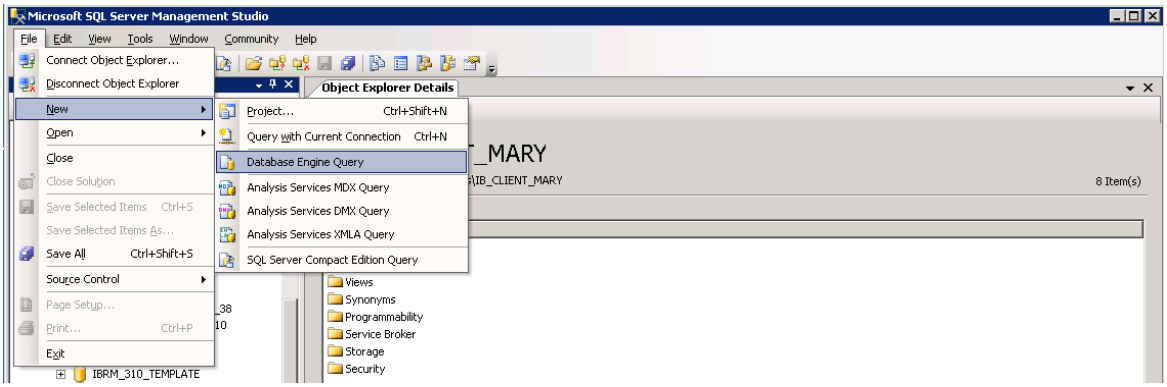


Figure 41 Updating Database

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 04.05.00 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 04.05.00 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 04.01.00 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.

Chapter 4

CREATING A SOFTRATER ENVIRONMENT

SoftRater databases can be added at any time after installation. If you are running a Windows only environment utilizing SQL Server, you can set up your SoftRater databases at installation. This type of set up has all environments on a single Windows server with a separate database server. If you want to create an environment on a machine that is separate from the Full RateManager install, then please see the corresponding SoftRater Installation Guide:

- SoftRater for Windows Installation
- SoftRater for WebLogic Installation
- SoftRater for WebSphere Installation
- SoftRater for JBoss Installation

There are two steps:

1. Restore the IBSR databases in SQL Server. You can restore as many as you need. For this example, we will restore an IBSR_QA database. This will be a quality assurance database for testing purposes.
2. Enter IBFA and Configure a QA logical environment.

We will have in place:

a. A full RateManager installation

b. Subscriber

c. Database connections

STEP 1 – RESTORING THE IBSR DATABASE

This step follows the instructions of Step 5 in the Full RateManager Installation, Chapter 2.

1. Located in the Insbridge Installation Directory:

    - SQL Server
        - SoftRater – IBSR
            - Latin1_General_BIN
                - DATABASE_BACKUP_IBSR_TEMPLATE_CASE_SENSITIVE.bak
            - SQL_Latin1_General_CP1_CI_AS
                - DATABASE_BACKUP_IBSR_TEMPLATE.bak
            - Update:Usp_IBSR_v04.05.00.sql

NOTE: *The Update:Usp_IBSR_v04.05.00.sql script is for updating a previous release and will not be used in a new installation.*

2. Select the SoftRater backup file you want to use, case sensitive or 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 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. In this example, we will use IBSR_QA.

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.*

6. Go to **Databases**.

7. Right click on **Databases**.

8. Select **Restore Database…** A separate screen will be displayed.

9. Enter your IBSR_QA database name in **To Database:**.

10. Select **From Device**. Click **…** to browse to the location where the database files were placed in step 3.

11. Select your database **IBSR_QA.BAK**.

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 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.

STEP 2 – CONFIGURE A QA LOGICAL ENVIRONMENT

This step follows the instructions of Step 6 in the Full RateManager Installation, Chapter 2.

1. Enter IBFA.
2. Browse to **SoftRater→Explorer→Subscriber name**.
3. Click on **Add Environment**.
4. Enter a **Name** and select a **Type**. For this example, we will create the Quality Control environment with a type of Quality Assurance.
5. Select the **Environments** link under the Configuration header on the left hand side to enter the configuration information for the newly created logical environment. You will be placed on the Environments screen. The environments you previously setup will be listed. If an environment is missing, you must return to the Configuration subtab and add it.

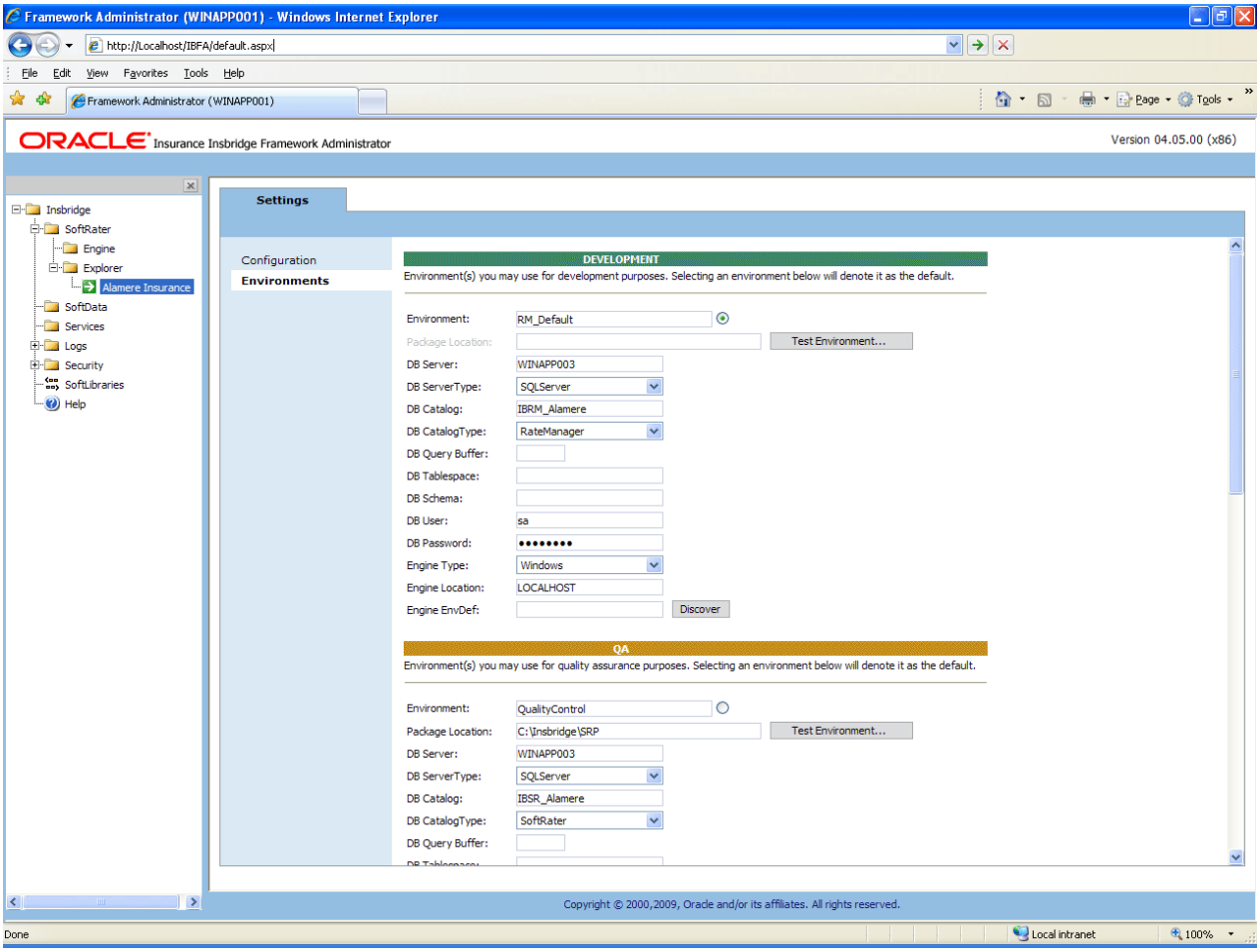


Figure 42 Editing Environment

6. The **Environment Name** will be complete. No changes are needed.

7. Enter in the file path where you want packages stored in the **Package Location**. Use the Test Environment option to have the location created for you.

8. Enter in the **DBServer** name or IP address. This is the database server where the SoftRater database was restored or created.

9. Select the **DB Server Type** that you are using.

10. The **DB Catalog** is the name of the SoftRater database restored in SQL Server. For this example, we would enter IBSR_QA.

11. The **DB Catalog Type** is **SoftRater**.

12. **DB Query Buffer**, **DB Tablespace** and **DB Schema** are not required for a SQL Server database.

13. Enter the **DB User** name and **Password**.

14. The **Engine Type** is Windows.

15. The **Engine Location** is the location of where you installed the SoftRater engine. For this example, we are utilizing the same machine where we installed the Full RateManager installation. We will enter LOCALHOST.

16. The **Engine EnvDef** can remain blank.

17. Click **SAVE** to save your entries.

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.

Index

A

Add Database Connection.....38
Adding
  Local Machine Administrators Group.9, 10
Admininstration
  Allow Data Type Change 57
  Backup Share Folder Location.....56
  Batch Package Threads.....56
  Batch Results with New Line 57
  Change Control.....58
  Enforce Release Packaging.....56
  Inactive Session Time Out.....57
  Messaging Server 56
  Minimum Login User ID Length 57
  Online Help 57
  Show Override Date Mask.....57
  SoftRater Server 56
  Use Insbridge Com + Admin.....56
  User Must Change Password 57
Administration Section
  Online Help Settings 57
  Setting Options 56
Administrative Permissions 13
Allow Data Type Change
  Admin.....57

B

Backup
  Registry Key.....59
Backup Share Folder Location
  Admin.....56
Batch Package Threads
  Admin.....56
Batch Results with New Line
  Admin.....57

C

Change Control
  Admin.....58
Changing
  Administrator Email.....57
Collation and Sort Order
  SQL Server 15, 32
COM+ Library 48
Configuring
  Insbridge Framework Administrator.....36
  Registry Editor..... 24
Creating
  Default Rating Environment 43
  Local User Account..... 9

D

Database
  IBRM 14
  IBSR Permissions 35
  Permissions..... 14
  Security 14
  Server Name 39, 40, 42
db_owner Permissions 35
Default Rating Environment
  Creating..... 43
Definitions 7
Description
  Subscriber 37
Disk Administrators SQL Server role
  User Account..... 35

E

E-Delivery
  IBRU..... 15
  Required Programs 15
Editing
  Web Config Settings 54
Edition Notice..... 2
Email
  Changing Administrator..... 57
Encryption
  SoftRater Package 59
Enforce Release Packaging
  Admin 56
Environment Types..... 44
Execute Update Script 54
Export
  Registry Key..... 59

F

Framework Administrator
  Administrator Email 57

H

HKEY_LOCAL_MACHINE/SOFTWARE/Insbridge 24, 25, 59
http://SERVERNAME/ibfa/ 36

I

IBFA
Rerun 48
Start Insbridge 13
Uninstall 48
IBRM_xxxx
db_owner Permissions 35, 36
IBRU 6
Definitions 7
E-Delivery 15
Implementation 6
IBRU Web Server
SERVERNAME 36
IBRU_INSTALL_DIR 19
IBSR Database
db_owner Permissions 35
ID
Subscriber 37
Implementation
IBRU 6
Inactive Session Time Out
Admin 57
Insbridge Framework
Installing 9
Local User Account 9
Insbridge Framework Administrator
Configuring 36
Extended Permission 13
Insbridge Key 26
Insbridge Message Service 13, 51
Insbridge Permissions 30
Insbridge Properties 29, 30
Insbridge Task Manager Service 13
insbridge user
Registry Key 24
Installation
Java Environment 6
Starting 19
Windows Environment 6
Installation Order 17
Installation Program
Requirements 18
Installer
Admin Rights for Installation 18
Installing
Insbridge Framework 9

L

Local Machine Administrators Group
Adding User 9, 10
Local User Account
Insbridge Framework 9

M

Messaging Server
Admin 56
Microsoft SQL Server 15
Minimum Login User ID Length
Admin 57
Missing
COM+ Library 48
Mixed Mode Authentication
Sql Server 15

N

Name
Subscriber 37

O

Online Help
Admin 57
Online Help settings
Administration Section 57
Overview
Package 7
Subscriber 37
Threading 56

P

Package
Environment 8
Overview 7
Part Numbers
E-Delivery 15
Password
Errors to COM+ Apps 11
Local User Account 11
PDF Reader
E-Delivery 15
Permissions
db_owner 35
Extended 13
Insbridge Key 24
Windows 2008 12

R

RateManager
Default Rating Environment....43
Disk Administrators SQL Server role....35
Registry Editor
Configuring....24
Registry Key....59
insbridge user....24
Requirements
Installation Program....18
Rerun
IBFA....48
Running
Database Updates....53

S

sa account
SQL Server Enterprise Manager....32, 64
Script
Executing Update....54
Viewing Update....60
Security
Database....14
Server
Admin Permissions....13
Insbridge Framework Name....39, 40, 42
SERVERNAME
Replacing....36
Service
Insbridge Task Manager....13
Setting Options
Administration Section....56
Settings....55
Administration....54
Editing Web Config....54
SQL Server....15
Thread....57
Shared
IBRU System....10
Show Override Date Mask
Admin....57
SoftRater
IBSR....14
SoftRater Package
Encryption....59
SoftRater Packages
Environments....8
SoftRater Server
Admin....56
SQL Scripts
Query Analyzer....61
SQL Server
Collation and Sort Order....15, 32
Mixed Mode Authentication....15
Requirements....15
Residing on Separate Host....15
Settings....15
User Accounts....35, 64
SQL Server Account
ibru....32
SQL Server Enterprise Manager
sa Privileges....32, 64
Subscriber
Information....37
Information for Database....40, 41
Overview....37
Types....37

T

Thread
Settings....57
Threading
Overview....56
Type
Subscriber....37
Types
Environment....44
Subscriber....37

U

Uninstall
IBFA....48
Unzip Utility
E-Delivery....15
Update
Web Config Settings....56
Updates
Running....53
Viewing....53
Use Insbridge Com + Admin
Admin....56
User
Access to Services....13
Local User Account....9
User Accounts
SQL Server....35, 64
User Must Change Password
Admin....57

V

Validating
COM+ Library....47
VFS Definition....7
Viewing

Database Updates 53
Virtual File Server Definition 7

W

Web Config
Editing Settings 54
Web Server
IBRU..... 39, 40, 42
Windows 2008
Permissions..... 12