

Oracle Insurance

**Insbridge Rating and
Underwriting
SoftRater for WebLogic
Installation Guide**

Release 4.5

May 2011

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Oracle Insurance Insbridge Rating and Underwriting SoftRater for WebLogic Installation Guide

Release 4.5

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CONTENTS

- PREFACEV
- Audience v
- Planning Your IBRU System..... v
- Types of Installation v
- Definitions vi
- Relate Documentsvii
- Conventionsvii
- Manual Historyviii

- CHAPTER 1**
- SYSTEM REQUIREMENTS 9
- Locating the Configuration Files 9
- Database User Roles and Permissions 10
- Microsoft SQL Server..... 11
- PREPARATION FOR DB2 INSTALLATION..... 11
- E-Delivery..... 12

- CHAPTER 2**
- SETTING UP WEBLOGIC 14
- Creating a New Server Domain 14
- Configuration Wizard 15
- Adding a System Property to WL Server 23
- Adding to the WebLogic Server - Windows 23
- Adding to the WebLogic Server – UNIX 24

- CHAPTER 3**
- INSTALLATION PROCEDURES – UTILIZING A SQL SERVER DATABASE.... 25
- Step 1: Starting the WebLogic Server 26
- Accessing the WebLogic Main Console 26
- Step 2: Installation of Required Library..... 27
- Step 3: Adding Libraries..... 27
- Step 4: Installation of the .EAR File 30
- Step 5: Restoring IBRU Databases in SQL Server..... 31
- Step 6: Setting up a WebLogic Environment in IBSS 35
- Step 7: Entering your IBSS Instance in IBFA 39

- CHAPTER 4**
- INSTALLATION PROCEDURES – UTILIZING AN ORACLE DATABASE 42
- Step 1: Starting the WebLogic Server 43

Accessing the WebLogic Main Console	43
Step 2: Installation of Required Library.....	44
Step 3: Adding Libraries.....	44
Step 4: Installation of the .EAR File	47
Step 5: Creating an Oracle Database	48
Location of DDL Directory.....	48
Oracle Database Setup.....	49
Step 6: Setting up a WebLogic Environment in IBSS.....	50
Step 7: Installation of Oracle Client.....	54
Running the Oracle Client.....	54
Using a DB2 Database	56
Step 8: Entering your IBSS Instance in IBFA	57
CHAPTER 5	
CREATING A SOFTRATER DATABASE	60
Microsoft SQL Server.....	60
ORACLE	60
IBM DB2.....	61
CHAPTER 6	
UPGRADING THE APPLICATION	62
UPGRADE NOTICE.....	62
Upgrading from a Previous Release.....	63
SQL SERVER UPGRADE	64
SUPPORT	
CONTACTING SUPPORT.....	65
TTY Access to Oracle Support Services	65
INDEX	
INDEX	66

LIST OF FIGURES

FIGURE 1 CREATING A NEW SERVER DOMAIN.....	14
FIGURE 2 CREATING NEW WEBLOGIC DOMAIN.....	15
FIGURE 3 SELECTING DOMAIN SOURCE	16
FIGURE 4 SPECIFYING DOMAIN NAME AND LOCATION.....	17
FIGURE 5 CREATING USER NAME AND PASSWORD.....	18
FIGURE 6 CONFIGURING SERVER START MODE AND JDK.....	19
FIGURE 7 CUSTOMIZING ENVIRONMENT AND SERVICE SETTINGS.....	20
FIGURE 8 CREATING WEBLOGIC DOMAIN	21
FIGURE 9 START MENU	22
FIGURE 10 STARTWEBLOGIC.CMD FILE	23
FIGURE 11 – EDITING STARTWEBLOGIC.CMD FILE.....	24
FIGURE 12 – EDITED STARTWEBLOGIC.CMD FILE	24
FIGURE 13 LOGGING INTO WEBLOGIC SERVER.....	26
FIGURE 14 ORACLE JSP LIBRARY.....	27
FIGURE 15 WEBLOGIC CONSOLE	27
FIGURE 16 DEPLOYMENTS PAGE	28
FIGURE 17 LIST OF LIBRARIES	28
FIGURE 18 SELECTING DEFAULTS	29
FIGURE 19 SELECT THE APPLICATION .EAR.....	30
FIGURE 20 RESTORING A DATABASE TO SQL SERVER	32
FIGURE 21 RIGHT CLICK TO RESTORE DATABASE.....	32
FIGURE 22 RESTORING A DATABASE	33
FIGURE 23 IBSS WEBLOGIC MAIN PAGE.....	35
FIGURE 24 ENVIRONMENT SETUP.....	36
FIGURE 25 RESETTING THE ENVIRONMENT	38
FIGURE 26 EDITING ENVIRONMENT	40
FIGURE 27 LOGGING INTO WEBLOGIC SERVER.....	43
FIGURE 28 ORACLE JSP LIBRARY.....	44
FIGURE 29 WEBLOGIC CONSOLE	44
FIGURE 30 DEPLOYMENTS PAGE	45
FIGURE 31 LIST OF LIBRARIES	45
FIGURE 32 SELECTING DEFAULTS	46
FIGURE 33 SELECT THE APPLICATION .EAR.....	47
FIGURE 34 IBSS WEBLOGIC MAIN PAGE.....	50
FIGURE 35 ENVIRONMENT SETUP.....	51
FIGURE 36 RESETTING THE ENVIRONMENT	53
FIGURE 37 LOCATING THE ORACLE CLIENT FOR 64-BIT INSTALLS	54
FIGURE 38 RUNNING THE ORACLE CLIENT.....	55
FIGURE 39 EDITING ENVIRONMENT	58

PREFACE

Welcome to *Oracle Insurance Insbridge Rating and Underwriting SoftRater for WebLogic Installation Guide*. This guide describes how to install and configure SoftRater for WebLogic Server 10.3.1. SoftRater may be used in conjunction with the Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager) system to process rating requests or it may stand alone.

The Insbridge SoftRater Server (IBSS) is the container for all Insbridge web components including the SoftRater Engine. All independent Insbridge components will be contained in the IBSS.

NOTE: *This installation was tested and certified on WebLogic 10.3.1.*

AUDIENCE

This guide is intended for technical personnel, such as installers, system administrators and others tasked with configuring SoftRater that would be involved in the maintenance and operation of SoftRater or RateManager. The audience for this guide should have a thorough knowledge of WebLogic.

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 Planning 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 SoftRater Installation on a Java 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.

RELATE DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Rating and Underwriting Framework Administrator.
- The Oracle Insurance Insbridge Rating and Underwriting SoftRater Server Guide.
- You can view these guides in-line at this address:

<http://www.oracle.com/technetwork/documentation/insurance-097481.html>

CONVENTIONS

This document may reference the following abbreviations:

- **WL:** WebLogic Server
- **JNDI:** Java Naming and Directory Interface

The following text conventions are used in this document:

Convention	Description
bold	Boldface type indicates graphical user interface elements associated with an action.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Release	Publication Date	Comment
1 st Edition	P01-762-01	V 3.8.9	April 2008	WebLogic 9.2
2 nd Edition	P01-762-02	V 3.9.0	May 2008	WebLogic 9.2
3 rd Edition	P01-762-03	V 3.10	September 2008	WebLogic 9.2
4 th Edition	P01-762-04	V 3.11	December 2008	WebLogic 9.2
5 th Edition	P01-762-05	V 3.12	July 2009	WebLogic 9.2
6 th Edition	P01-762-06	V 3.13	December 2009	WebLogic 10.3
7 th Edition	P01-762-07	R 4.0	April 2010	WebLogic 10.3
8 th Edition	P01-762-08	R 4.0.1	August 2010	WebLogic 10.3
9 th Edition	P01-762-09	R 4.1	December 2010	WebLogic 10.3
10 th Edition	P01-762-010	R 4.5	May 2011	WebLogic 10.3

SYSTEM REQUIREMENTS

For minimum operating system and hardware requirements, please see the Hardware Software requirements guide.

Prior to creating a new SoftRater environment, please have ready:

- **Full WebLogic installation**
- **Database name or Environment name**
- **Database login information**
- **Database server name, either IP or DNS**
- **Database DDL, updates or backup files for the database you want to utilize. These files are located in the 04.05.00 Insbridge IBRU folder.**
- **If utilizing Oracle or DB2, DB Catalog name**
- **If utilizing Oracle or DB2, DB Schema name**
- **Subscriber ID**
- **Access to the server where the IBRU system was installed**
- **URL of the current IBFA**
- **Package location where you want the packages stored**

These components will be needed at various times during the installation and implementation of SoftRater for WebLogic.

LOCATING THE CONFIGURATION FILES

We suggest creating a C:\Insbridge\config folder but you may use any folder name you want and you can place the folder any where you want. This folder will hold the necessary files for the SoftRater for WebLogic installation. Take note of the location and make sure you have created this folder prior to running the installation.

NOTE: *For the purposes of this guide, the location will be referred to as C:\Insbridge\config.*

The SoftRater for WebLogic zip file should be downloaded to the WebLogic server prior to configuration. Unzip the file. There will be an XML file, a .JAR file and an .EAR file inside.

- **ojsp.jar**

- **IBSS_WL.ear**
- **Insbridge.net.softraterconfig.xml**

Place these files in the C:\Insbridge\config folder.

NOTE: *It is important that the configuration path specified in the Adding a System Property to WL Server section of this document contain both the application and configuration files. These files need to be placed where you specify in the startWebLogic.cmd file.*

Once you have these files in place, do not move them.

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 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.*

PREPARATION FOR DB2 INSTALLATION

For DB2 installations please follow the DB2 instruction set below prior to installing EAR file.

For DB2 installations only.

1. Unzip the files to any designated location.
2. Locate and copy the DB2 jar file to the "APP-INF\lib" folder. The DB2 JAR file should be in your DB2 installation folder java directory. You may also download this file from IBM directly.
3. Run the batch file (ex: example.bat) from a console using the following parameters:
 - a- Java_Home folder. i.e.: "C:\java\oracle\jdk150_10"
 - b- Installation EAR filename. i.e.: **IBSS_WL.EAR**

Example: "**DB2_Patch C:\java\oracle\jdk150_10\IBSS_WL.EAR**"
4. Check the output messages from the batch file:

- a- If Java_Home folder is invalid an error will be shown.

"The provided java_home path is not valid."

"Please provide a valid java_home folder in order to continue."

- b- If parameters are valid, the application will show the compression ratio used for the DB2 jar file.
- c- A message showing "SoftRater EAR Patch applied successfully..." will be displayed once the process completes.

NOTE: Upon completion of these steps, the batch file will copy the original EAR adding a "DB2_" prefix to the new filename. The new file "DB2_<EAR_FileName>" will be modified adding the DB2 jar file.

The original EAR should be located on the same folder as the batch file so it can be copied and renamed in the same operation.

NOTE: An example.bat file is also provided. You may need to change the Java_Home and EAR values in order to run it.

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.exe**

The SoftRater for WebLogic 04.05.00 zip file will contain:

- The 04.05.00-insbridge-wbl-eng Folder
 - insbridge.net.sofraterconfig.xml
 - IBSS_WL.ear
 - ojsp.jar

No license file is required.

SoftRater can be installed any time after the Insbridge Framework Administrator and RateManager have been installed. SoftRater must be installed prior to any users creating packages. Please note, all folders and files may not be needed, depending upon the kind of setup you want.

SETTING UP WEBLOGIC

WebLogic 10.3 should be up and running prior to installing the .EAR file. If you need to create a domain, the following steps may be executed.

NOTE: *This is a suggested domain setup. Your setup may vary.*

It is not required that you set up a separate domain. If you do create a separate Insbridge domain, please verify that there are no port issues. The Insbridge .EAR file can be installed on an already existing domain.

CREATING A NEW SERVER DOMAIN

To create a new server domain, go to your **Start Menu**→**Oracle WebLogic**→**WebLogic Server 11gR1**→**Tools**→**Configuration Wizard** and follow the wizard according to your company standards. In most cases, for the Insbridge application, a default basic configuration could be used.

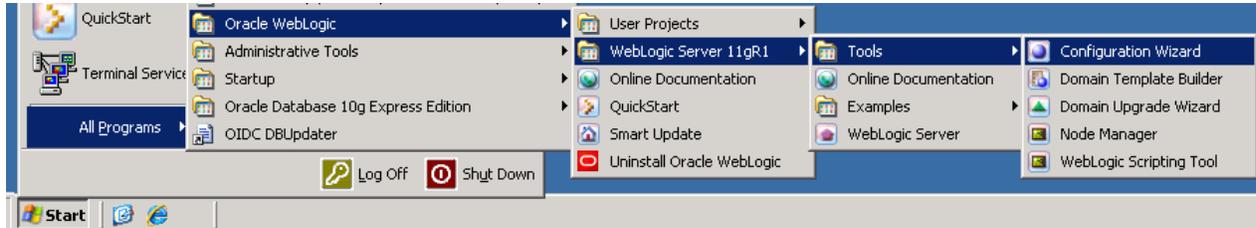


Figure 1 Creating a New Server Domain

CONFIGURATION WIZARD

On the Welcome screen, you will want to create a new WebLogic domain.

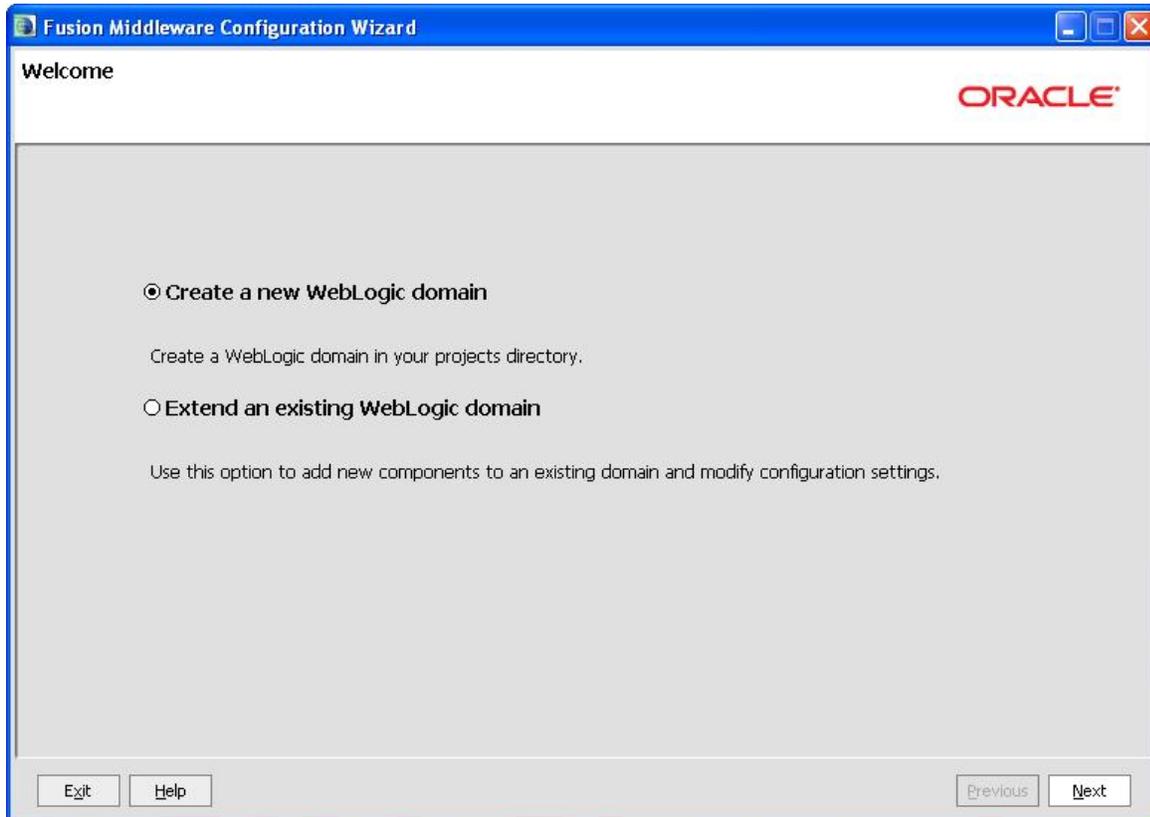


Figure 2 Creating New WebLogic Domain

1. Select **Create a New WebLogic domain**.
2. Click **Next** to advance to the next screen.

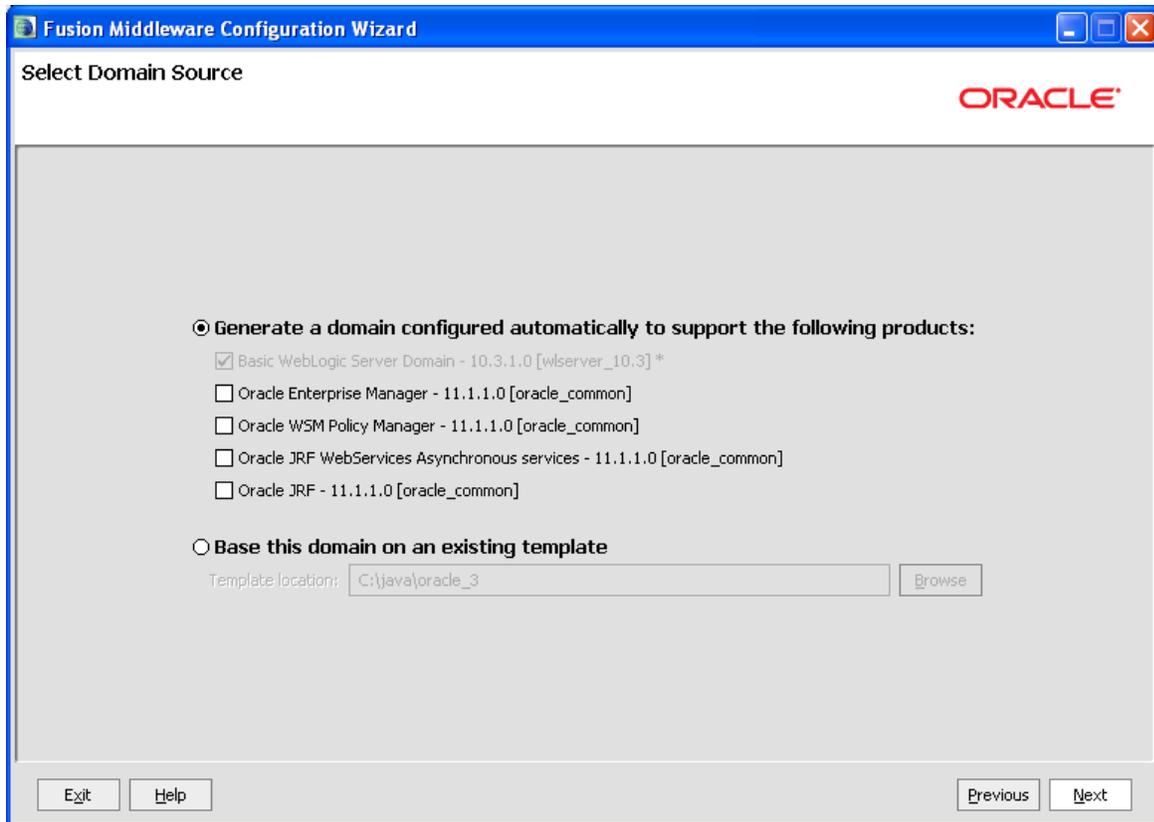


Figure 3 Selecting Domain Source

3. For a basic installation, select **Generate a domain configured automatically to support the following products:** The **WebLogic Server** option is the only option you will need to select.
4. Click **Next** to continue.

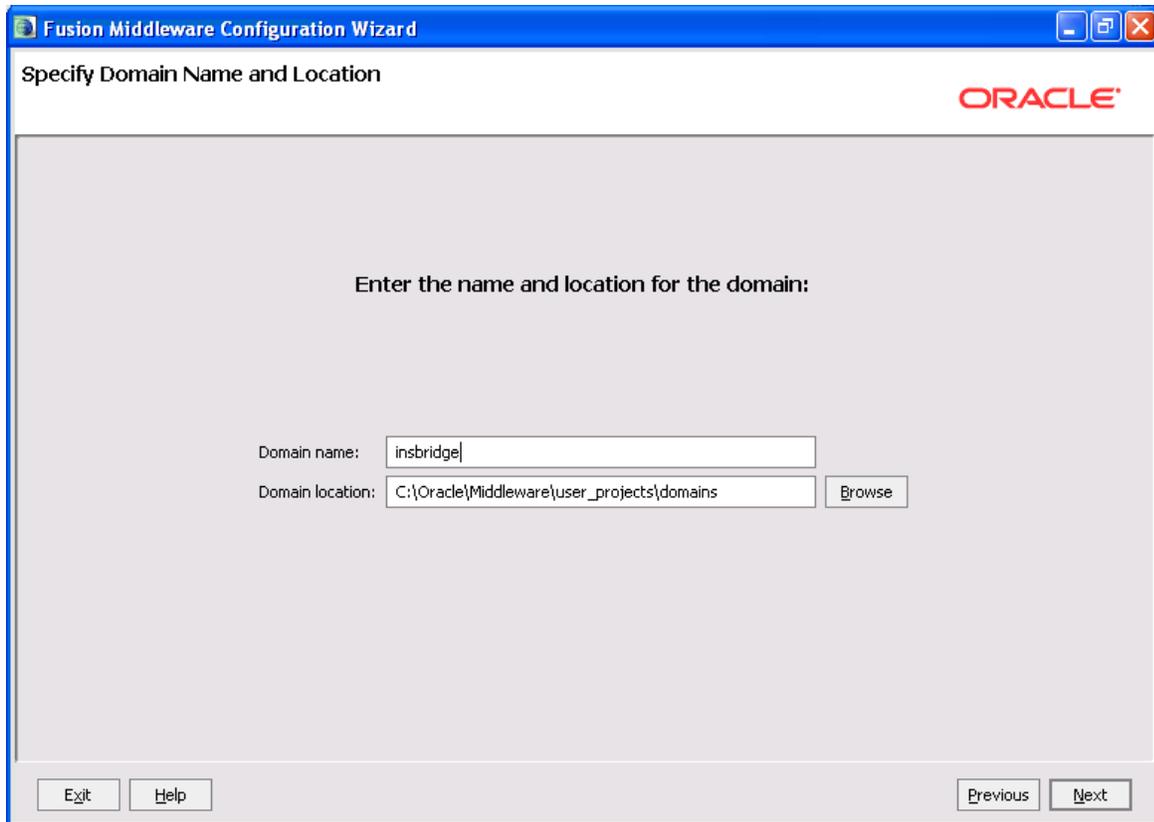


Figure 4 Specifying Domain Name and Location

5. Specify the **Domain Name** and **Location**. The domain name can be anything that meets your company standards.
6. Click **Next** to continue.

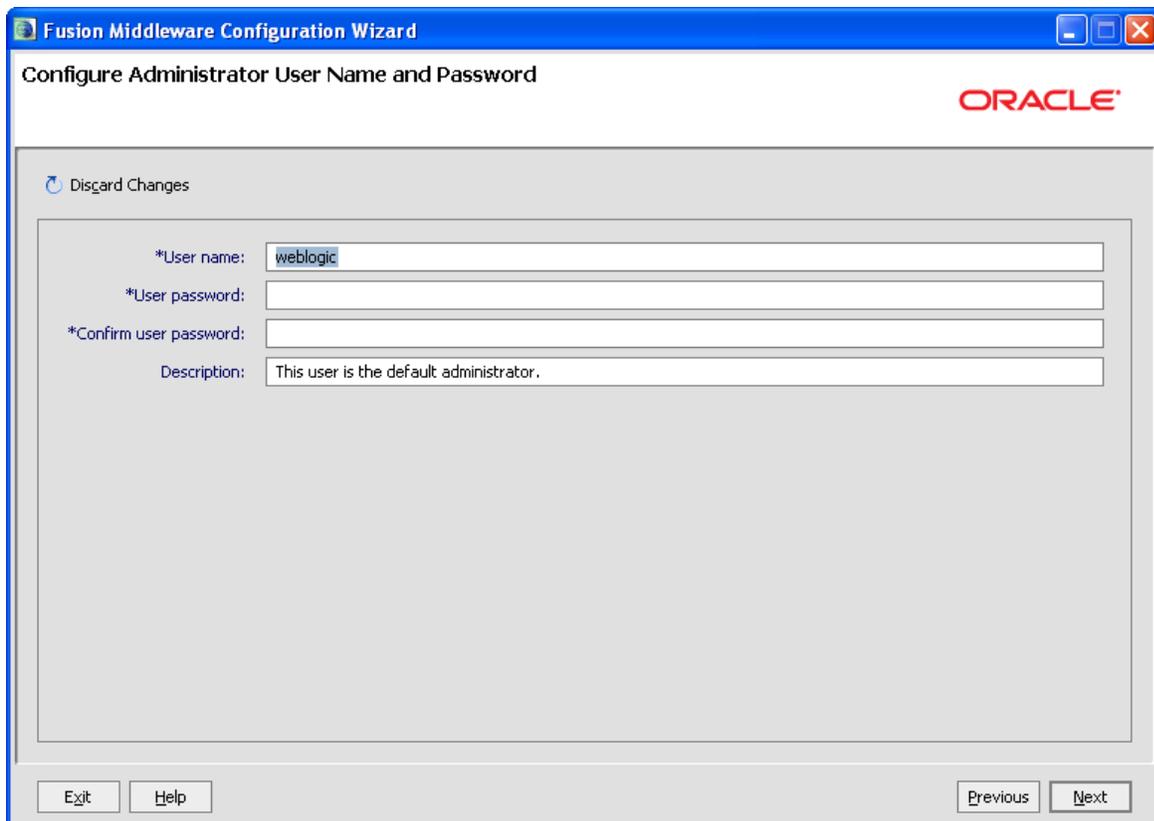


Figure 5 Creating User Name and Password

7. Next, configure the Administrator User name and password. The **User name** and **password** are WebLogic, unless otherwise specified.
8. The **Description** is optional.
9. Click **Next** to continue.

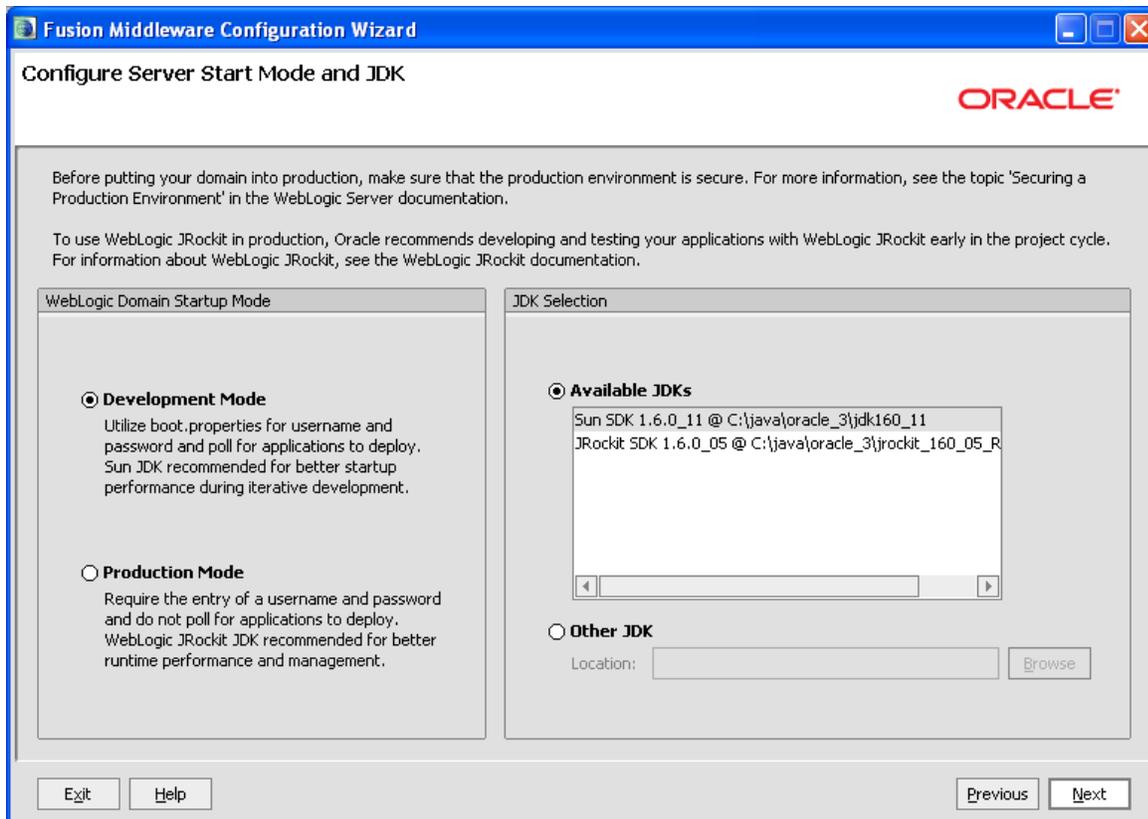


Figure 6 Configuring Server Start Mode and JDK

10. Select **Development Mode** for the Startup Mode.
11. Select the supplied **Sun SDK** in the **Available JDKs** area.
12. Click **Next** to continue.

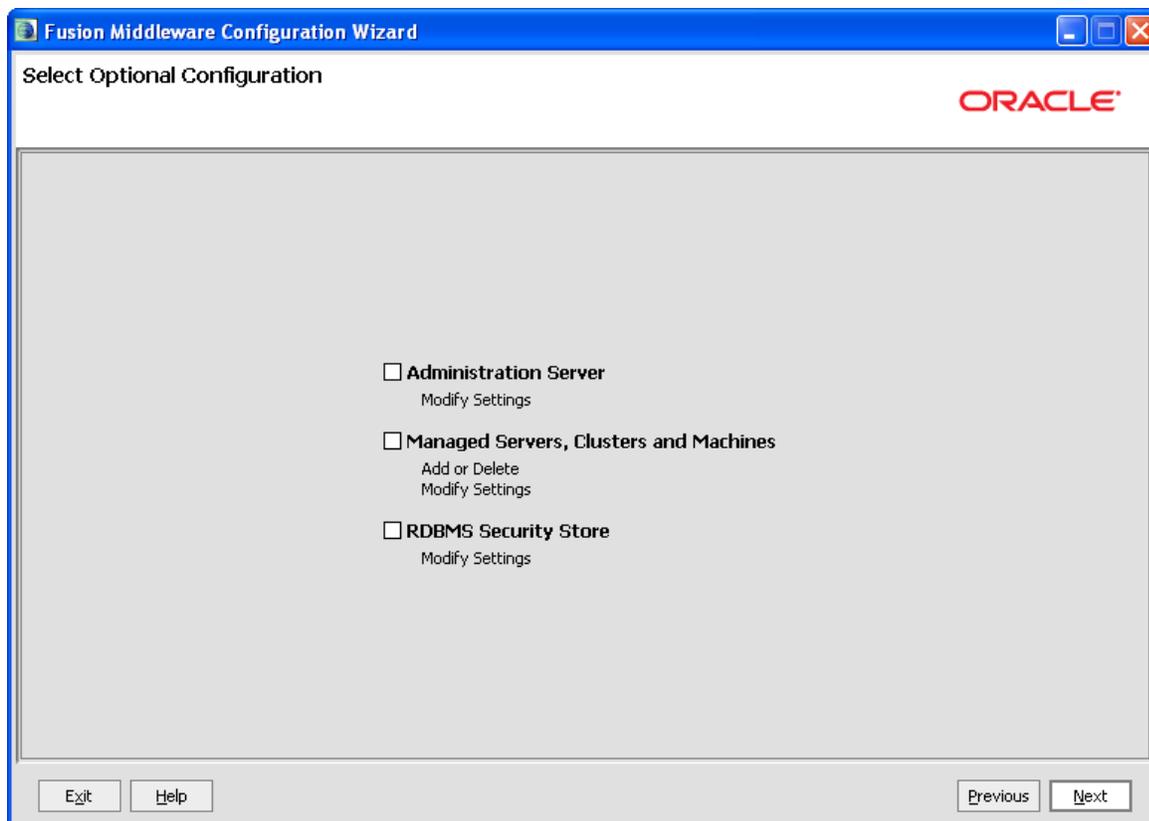


Figure 7 Customizing Environment and Service Settings

13. These modifications are not required for basic installation.
14. Click **Next**.

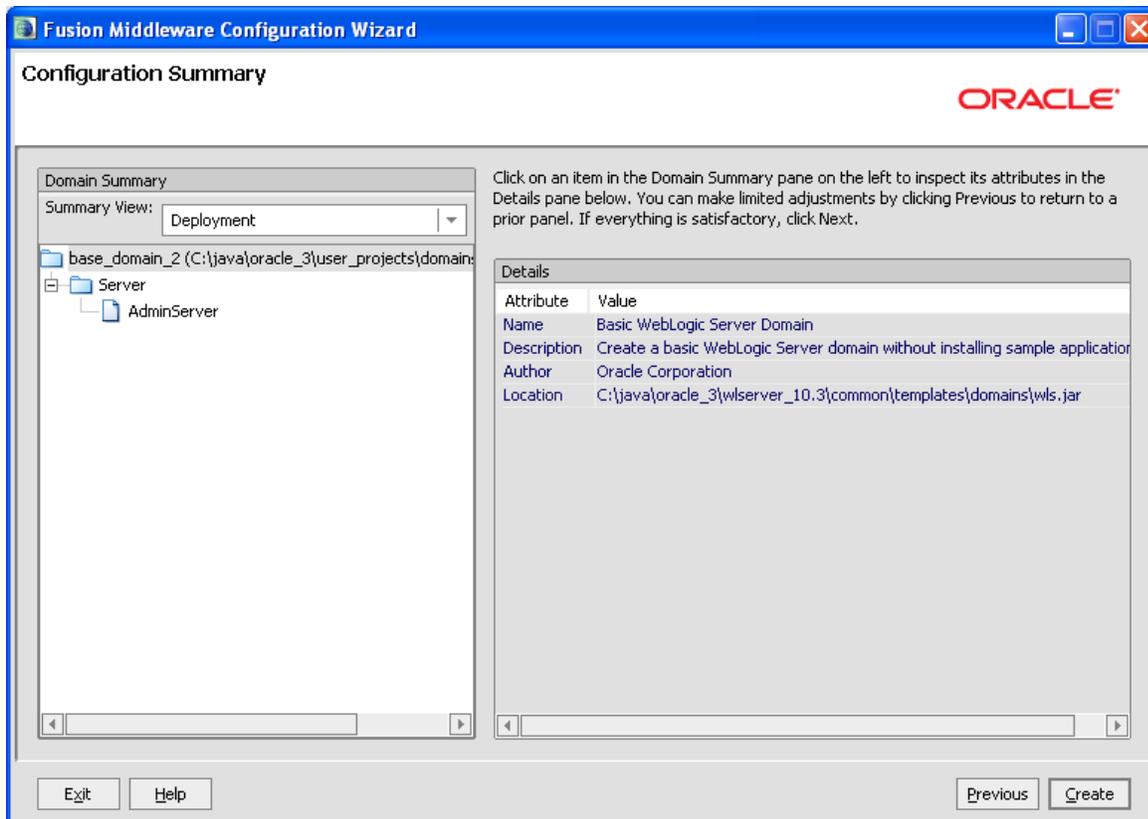


Figure 8 Creating WebLogic Domain

15. No other changes are necessary. Click **Create**.

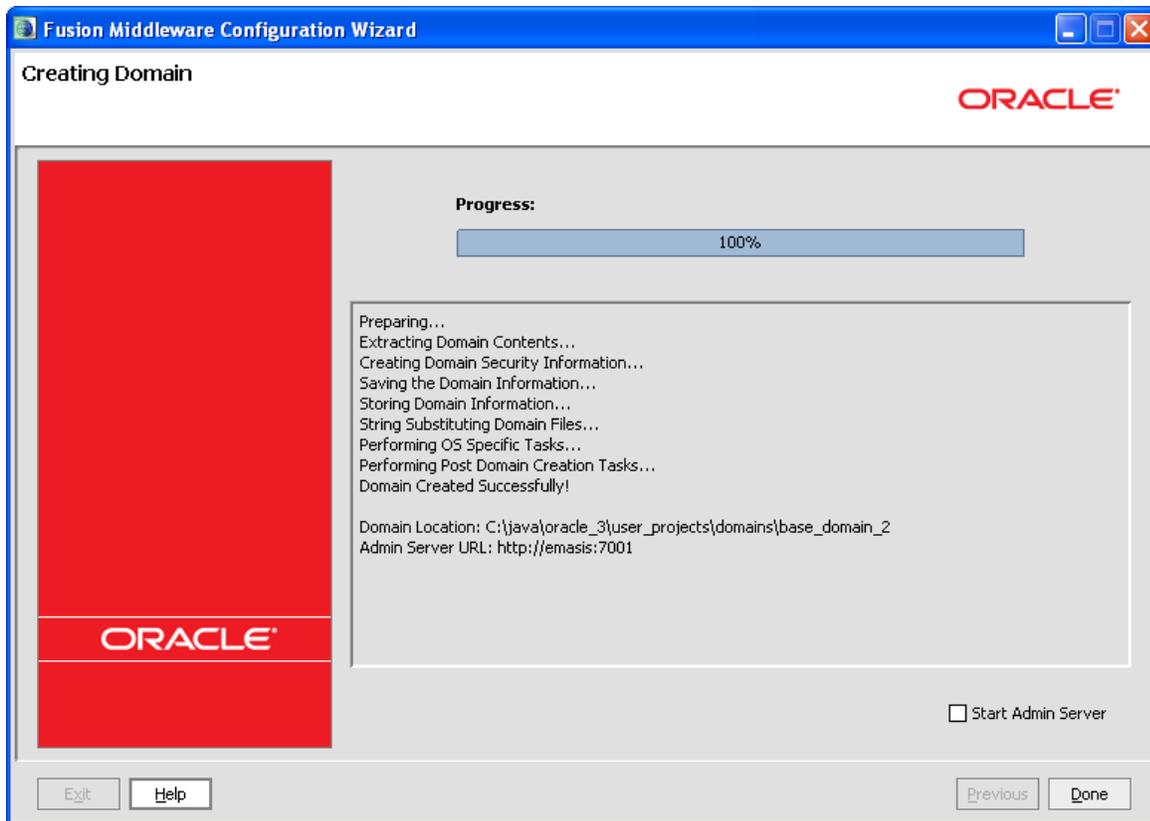


Figure 9 Start Menu

16. WebLogic will begin the creation of the Domain. The progress bar will display 100% when complete.
17. Click **Done** to close the Wizard. The domain is ready to use.

ADDING A SYSTEM PROPERTY TO WL SERVER

The Inbridge application requires a shared variable on the WebLogic Server that points to the location of the configuration files.

In WebLogic, it is not possible to define variables as part of the Server JNDI. For this reason, you must create a Java System property in the server initialization that can be used by the application to retrieve the path that accesses the system configuration files.

NOTE: *If the server domain was running during these modifications, you will need to restart the server before proceeding.*

Adding to the WebLogic Server - Windows

1. In a Windows Explorer window, enter the server domain location, i.e. %Domain=Home%.

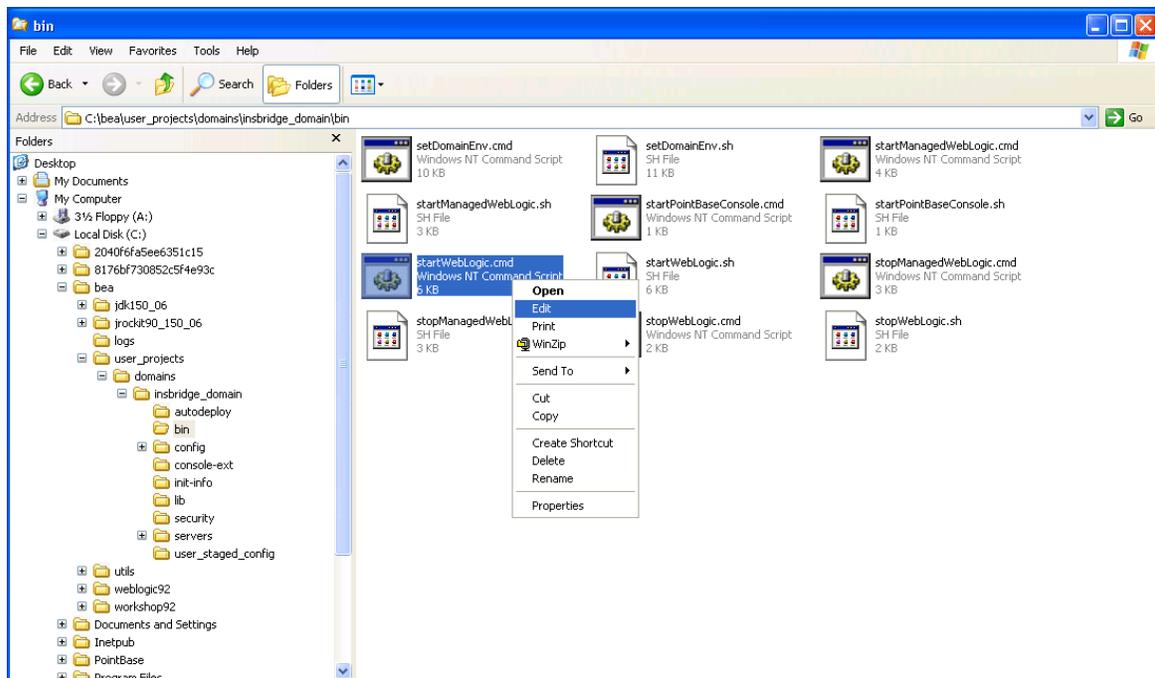


Figure 10 startWebLogic.cmd File

2. In the “bin” folder locate the “startWebLogic.cmd” file. Make a backup of the “startWebLogic.cmd” file.
3. Open the “startWebLogic.cmd” file and right click to **Edit**. Scroll towards the end of the file.

```

if "%WLS_REDIRECT_LOG%"==" " (
%JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% %JAVA_OPTIONS% -Dweblogic.Name=%SERVER_NAME% -
Djava.security.policy=%WL_HOME%\server\lib\weblogic.policy %PROXY_SETTINGS% %SERVER_CLASS%
) else (
%JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% %JAVA_OPTIONS% -Dweblogic.Name=%SERVER_NAME% -
Djava.security.policy=%WL_HOME%\server\lib\weblogic.policy %PROXY_SETTINGS% %SERVER_CLASS%
>"%WLS_REDIRECT_LOG%" 2>&1
)

```

Figure 11 – Editing startWebLogic.cmd File

4. Locate the **DOS if instruction** that looks similar to the one in Figure 11. Your exact file may have slight variations.
5. In both conditions of this instruction you will need to insert the following system property declaration:

- `-DINSBRIDGE_APP_DIR="C:\Insbridge\config"`. If you copy, please verify valid characters have been entered.

In this declaration, add a system property to the Java Virtual Machine using the “-D” parameter, then specify “**INSBRIDGE_APP_DIR**” as the name of the new variable.

You must also specify the path where the configuration file will be located. i.e. “**C:\Insbridge\Config**”. Where **C:\Insbridge\config** is the folder you created earlier.

6. **Save** your changes.

```

if "%WLS_REDIRECT_LOG%"==" " (
%JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% %JAVA_OPTIONS% -Dweblogic.Name=%SERVER_NAME% -
Djava.security.policy=%WL_HOME%\server\lib\weblogic.policy -DINSBRIDGE_APP_DIR= "C:\Insbridge\Config"
%PROXY_SETTINGS% %SERVER_CLASS%
) else (
%JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% %JAVA_OPTIONS% -Dweblogic.Name=%SERVER_NAME% -
Djava.security.policy=%WL_HOME%\server\lib\weblogic.policy -DINSBRIDGE_APP_DIR= "C:\Insbridge\Config"
%PROXY_SETTINGS% %SERVER_CLASS% >"%WLS_REDIRECT_LOG%" 2>&1
)

```

Figure 12 – Edited startWebLogic.cmd File

7. The variable will be added to the Server the next time it is started.

Adding to the WebLogic Server – UNIX

The procedure is similar in UNIX. Locate the “**startWebLogic.sh**” file. In many instances, the file will be located in: `..\Oracle\Middleware\user_projects\domains\insbridge\bin`. Open the file and right click to **Edit**. Scroll towards the end of the file and make the necessary changes.

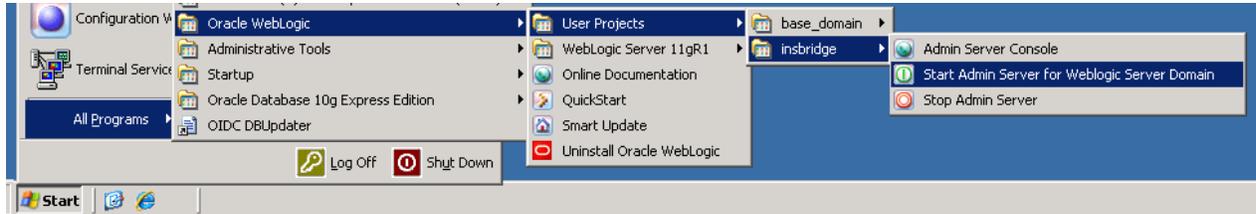
INSTALLATION PROCEDURES – UTILIZING A SQL SERVER DATABASE

The following is a check list of the installation steps needed to perform a NEW SoftRater for WebLogic Installation:

1. Start the WebLogic server.
2. Installation of the Required Library.
3. Add the ojsp.jar library.
4. Installation of the .EAR file.
5. Creation of the IBSR databases is next.
6. Create a WebLogic entry in IBSS.
7. Create a WebLogic entry in IBFA.

Step 1: Starting the WebLogic Server

To start the WebLogic server, go to the “**Start Menu**→**Oracle WebLogic**→**User Projects**→<**Your Server Domain**>→**Start Admin Server for WebLogic Server Domain**”.



NOTE: Please do not close the command prompt window that starts the service. Closing the command prompt window will stop the webserver instance.

Accessing the WebLogic Main Console

The WebLogic Main Console can be accessed once the WebLogic server domain is running by typing <http://<ServerName or IP Address>:<Port>/console> on your browser. You will need the administrator password used when the server domain was created. i.e. <http://localhost:7001/console>



Figure 13 Logging into WebLogic Server

Step 2: Installation of Required Library

The WebLogic Insbridge application requires one WebLogic library to be deployed on to the server prior to the application installation itself. This library will be shipped with the SoftRater for WebLogic application. Place this library anywhere on your disk and then proceed with the installation.

Library	Description
oracle.jsp.next (ojsp.jar)	Oracle Jsp library for ADF applications

Figure 14 Oracle jsp library

Step 3: Adding Libraries

The WebLogic administration console offers multiple configuration options. This guide will focus on the deployments features that can be accessed by clicking the highlighted **Deployments** link on the left hand of the console.

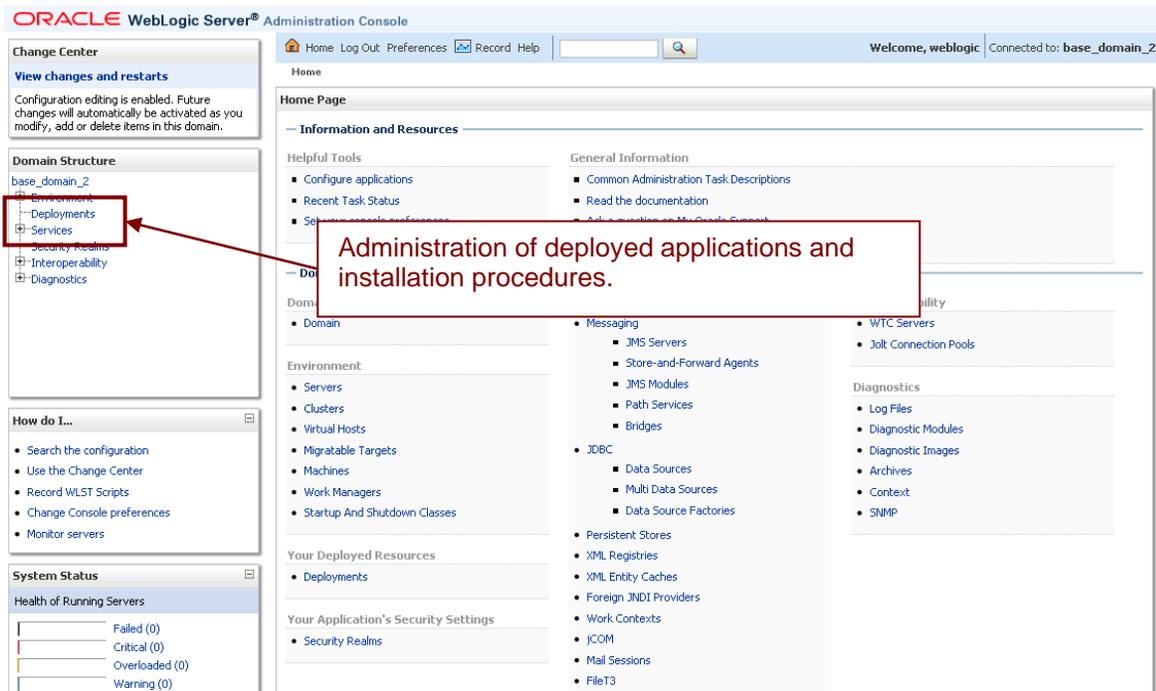


Figure 15 WebLogic Console

1. Click the **Deployments** link. The screen will refresh with the Deployments Page.

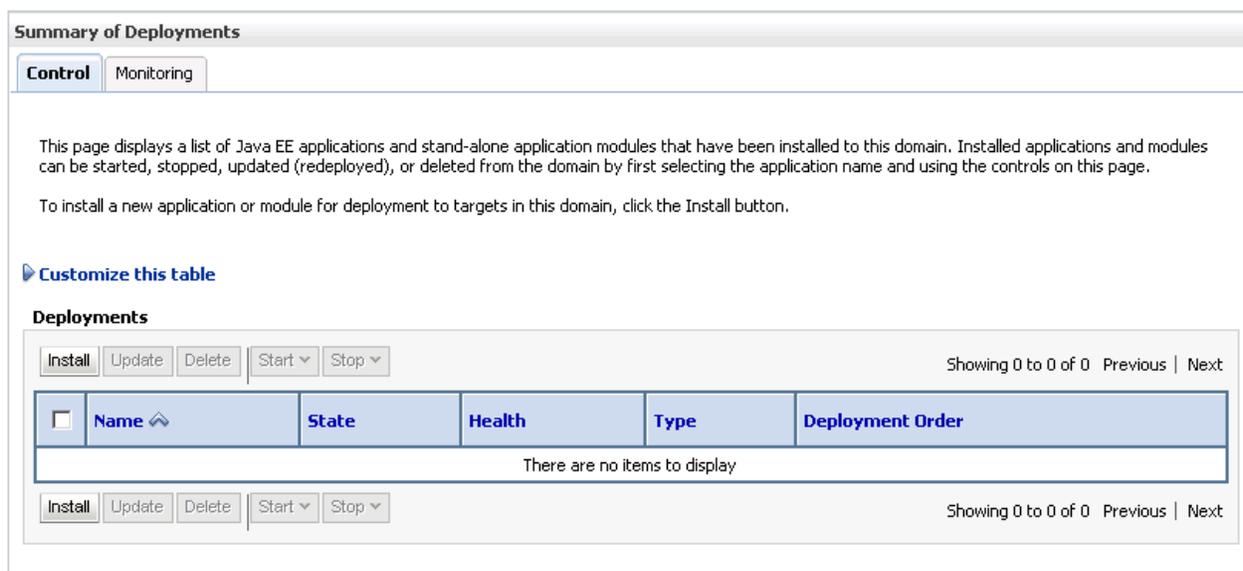


Figure 16 Deployments Page

2. From the Summary of Deployments Page, click the **Install** button. The screen will refresh to the Install Application Assistant page.
3. The list of Locations will be displayed. Select the location where you placed the “ojsp.jar” file.
4. Select the “ojsp.jar” library.

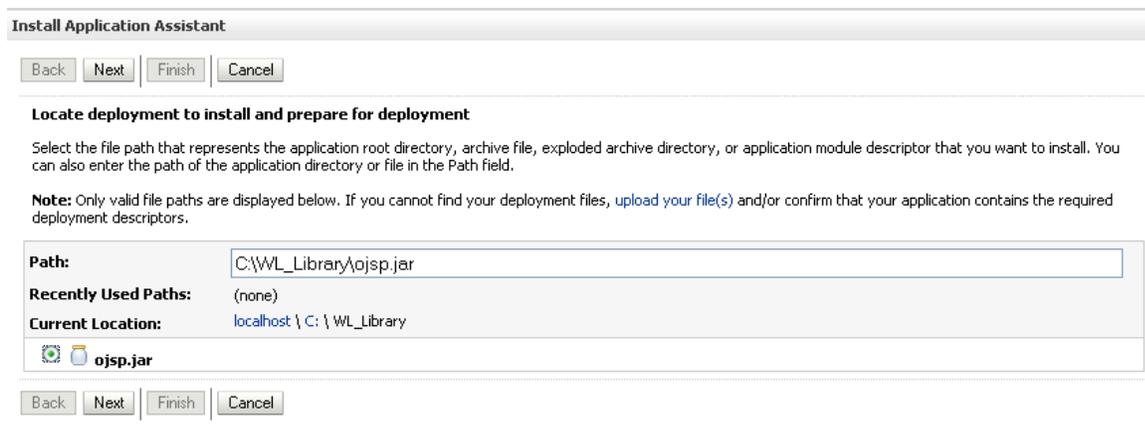


Figure 17 List of Libraries

5. Click the **Next** button.
6. On the **Optional Settings** page, you will need to change the library name to “oracle.jsp.next”. Everything else can be set to the default values click **Finish**.

NOTE: You can navigate back to the previous folder by clicking the hyperlinks in the **Current Location:** path.

Install Application Assistant

Back Next Finish Cancel

Optional Settings

You can modify these settings or accept the defaults

General

What do you want to name this deployment?

Name:

Security

What security model do you want to use with this application?

DD Only: Use only roles and policies that are defined in the deployment descriptors.

Custom Roles: Use roles that are defined in the Administration Console; use policies that are defined in the deployment descriptor.

Custom Roles and Policies: Use only roles and policies that are defined in the Administration Console.

Advanced: Use a custom model that you have configured on the realm's configuration page.

Source accessibility

How should the source files be made accessible?

Use the defaults defined by the deployment's targets

Recommended selection.

Copy this application onto every target for me

During deployment, the files will be copied automatically to the managed servers to which the application is targeted.

I will make the deployment accessible from the following location

Location:

Provide the location from where all targets will access this application's files. This is often a shared directory. You must ensure the application files exist in this location and that each target can reach the location.

Back Next Finish Cancel

Figure 18 Selecting Defaults

7. After the library has been added, you will be placed on the Summary of Deployments page. The library you added will be listed. Read the messages at the top of the screen and correct any error messages.
8. The library will be active.

Step 4: Installation of the .EAR File

NOTE: For SQL Server 2005, no additional steps are required. For DB2, please make sure you have completed the DB2 preparation requirements. See Chapter4, Preparing for DB2 Installation.

The installation of the Insbridge .EAR File begins in the same way as the installation of the WebLogic library.

1. From the Summary of Deployments Page, click the **Install** button. The screen will refresh to the Install Application Assistant page.
2. The list of Locations will be displayed. Click the location you need to reach the .EAR file.
3. Select the **.EAR** file.

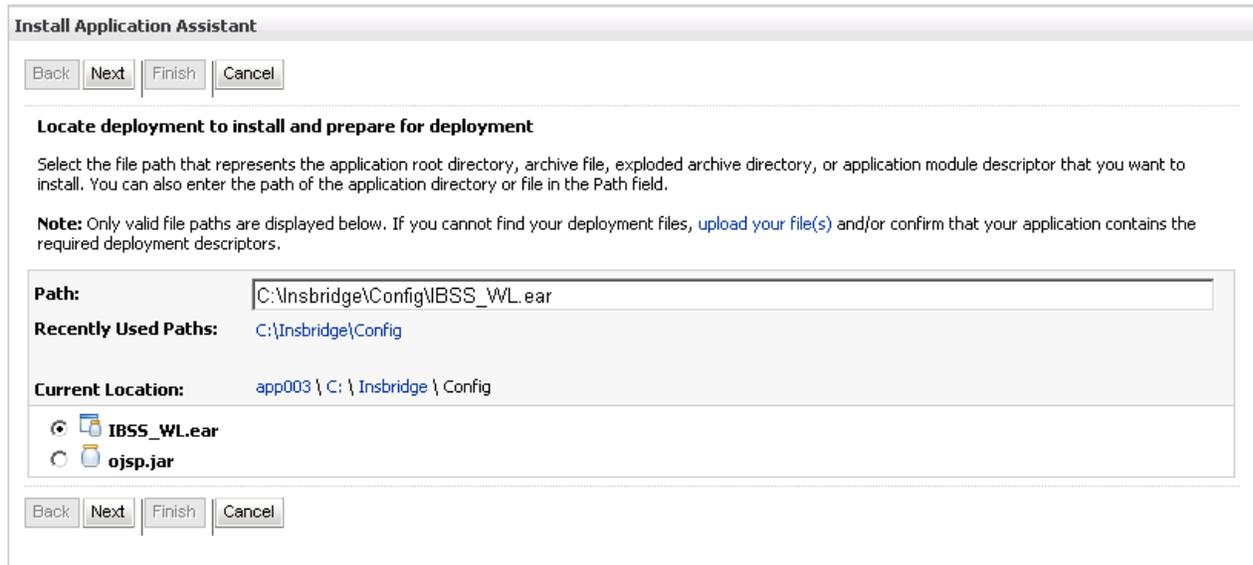


Figure 19 Select the Application .EAR

4. Click **Next**.

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:
 - ◆ 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
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 name 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 name after it has 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.*

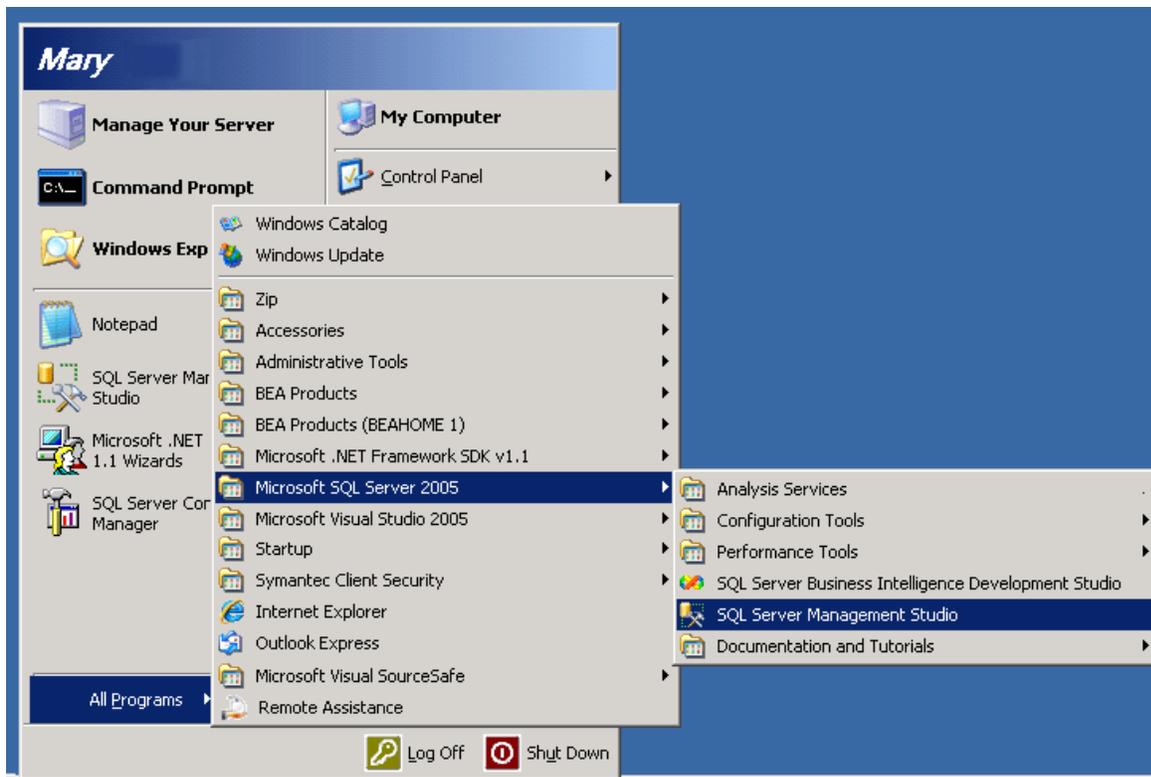


Figure 20 Restoring a Database to SQL Server

6. Go to **Databases**.

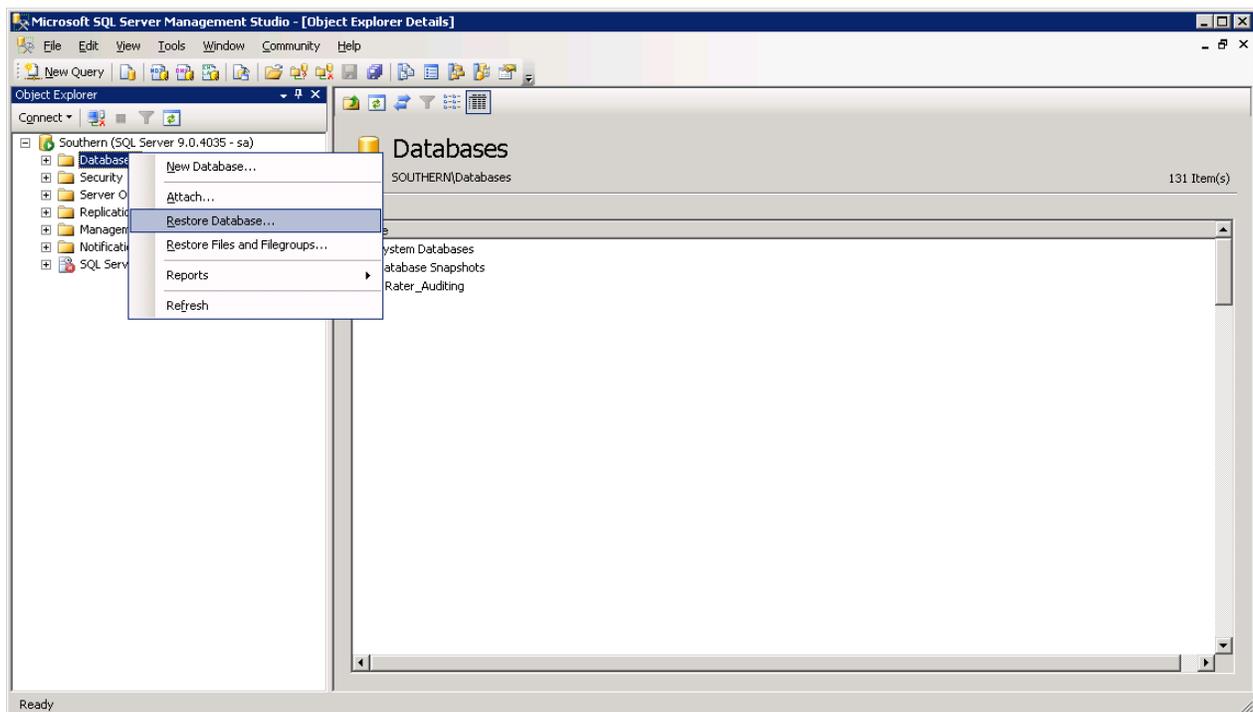


Figure 21 Right Click to Restore Database

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

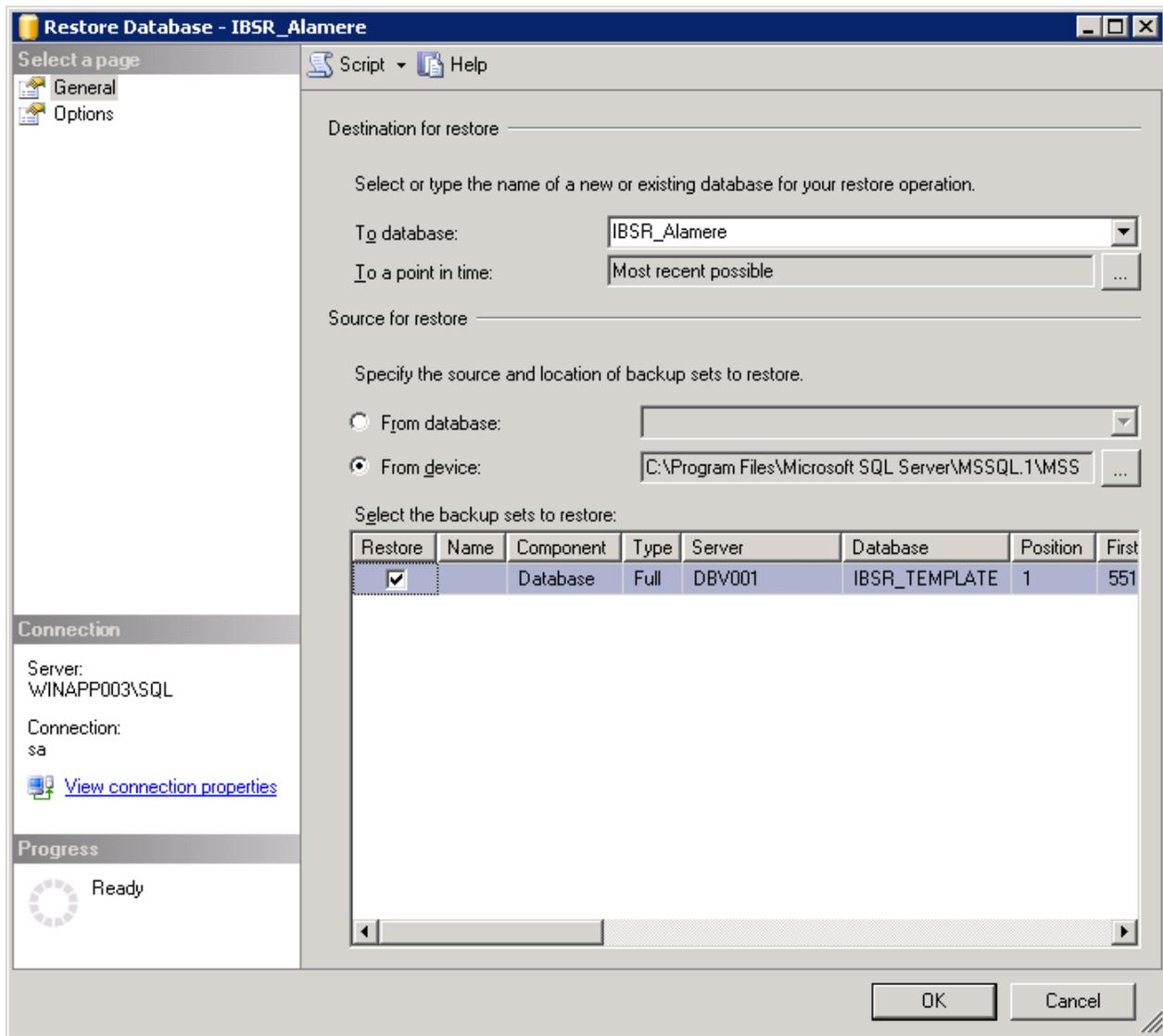


Figure 22 Restoring a Database

9. Enter your IBSR database name in **To Database:**.
10. Select **From Device**. Click ... to browse to the location where the database files were placed in step 3.
11. Select your database **IBSR_ 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. 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 6: Setting up a WebLogic Environment in IBSS

You will be able to access the application by typing <http://<ServerName or IP Address>:7001/IBSS>

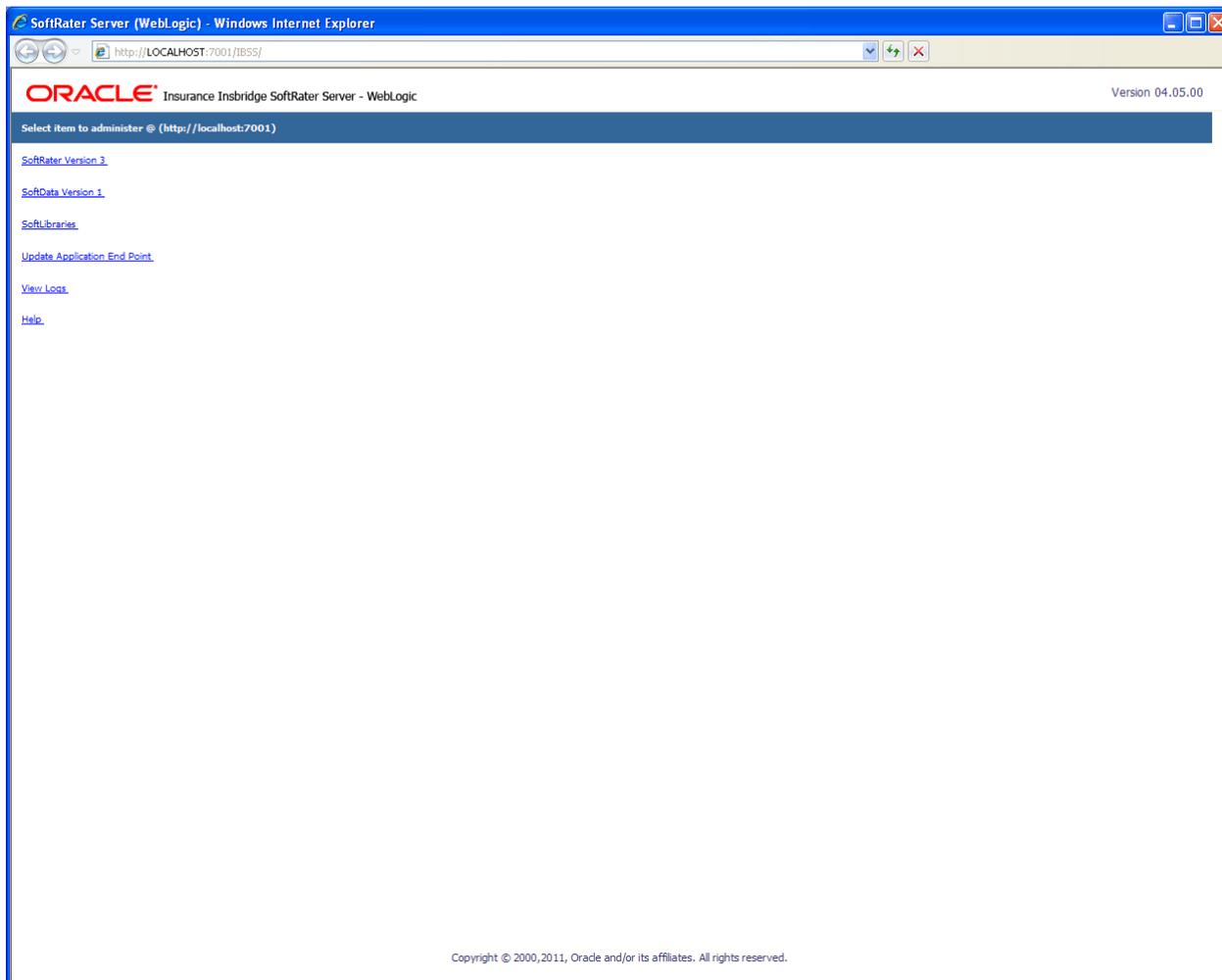


Figure 23 IBSS WebLogic Main Page

NOTE: Notice that if you changed the WebLogic default port (7001) during the Server Domain creation, you should change the default application port on the ["Update Application End Point"](#) option located in the IBSS main page before accessing the application WebServices and methods.

NOTE: The IBSS parameter in the application URL must be capitalized.

To Create/Edit an Environment

Prior to setting up an environment in IBSS you will need the Subscriber ID that you setup in IBFA.

1. Select **SoftRater Version 3** from the Main page. You will be placed on the SoftRater page.
2. Select the **Environment Setup** link.

The **Environment Setup** section allows you to configure rating environments. An environment is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. There is no limit to the number of environments you may have. Required fields will be marked with an asterisk (*).

ORACLE Insurance Insbridge SoftRater Server - WebLogic

SoftRater Administrator

* Environment Setup

Status:

SELECT ENVIRONMENT >> Add New Environment <<

Environment Name* Company Id*

Database Server* Port* Query Block

Database Name* Schema name**

Database User Id*

Database Password*

Provider Type

Database Type

Data Dir

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

Figure 24 Environment Setup

3. To create a new environment, use the drop down text box next to **SELECT ENVIRONMENT** and select **>> Add New Environment <<**. If the page does not automatically refresh, click **GO**.
4. When the page refreshes, enter the following information:

Environment Name: A name for the environment.

Database Server: The name of the server that houses the database that packages are loaded to.

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

Database User Id: The username to access the database.

Database Password: The password for the username entered.

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

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

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

Company Id: Your Company's subscriber ID. This must be the same ID number used in IBFA.

Port: Listening port to the target Database Management System.

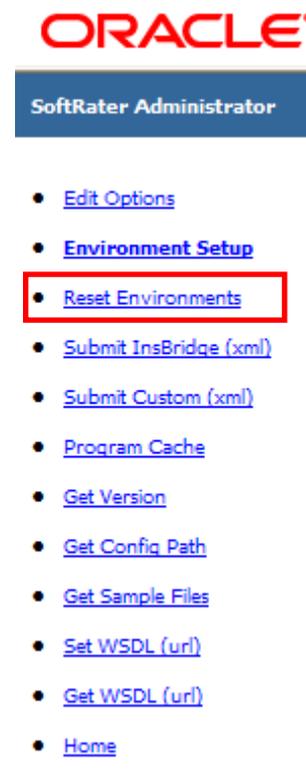
Default values:

SQL Server – 1433
Oracle – 1521
DB2 – 50000

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

Schema Name: The schema name for the database.

5. When you are finished entering information, click **SAVE**. The environment will be saved and the **Status** field will update.
6. Before you can use the new environment for rating, you will need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the environment page, select the Reset Environments options. You will be placed on the environments page.



To activate changes to an environment, the SoftRater configuration XML file must be reloaded by clicking **EXECUTE**. The screen will refresh and the environment will be reset. Click **EXIT** to return to the SoftRater Administrator menu.

*** Reset Environment Configuration**

Select this method to re-load the SoftRater configuration xml file making any changes to the environment settings now active. NOTE: If program caching is enabled the ALL items currently in the cache will be purged.

Note: Transactions currently in process could be made invalid.

Execute

Exit

Figure 25 Resetting the Environment

NOTE: *All information in the cache will be purged and any transactions currently processing could be made invalid.*

Step 7: Entering your IBSS Instance in IBFA

IBFA will need to communicate with the IBSS environment. This will allow for packages to be loaded. There are two parts that will need to be completed:

1. Create an environment.
2. Configure the environment.

A SoftRater environment may be completed at installation or can be added at a later time. A SoftRater environment can be on a Windows machine or a Java machine running an application server, such as WebLogic. There is no limit to the number of SoftRater environments that you can have.

1. Enter IBFA.
2. Browse to **SoftRater**→**Explorer**→**Subscriber name**.
3. Click on **Add Environment**.
4. Enter a **Name** and select a **Type**. For example, you can create a 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.

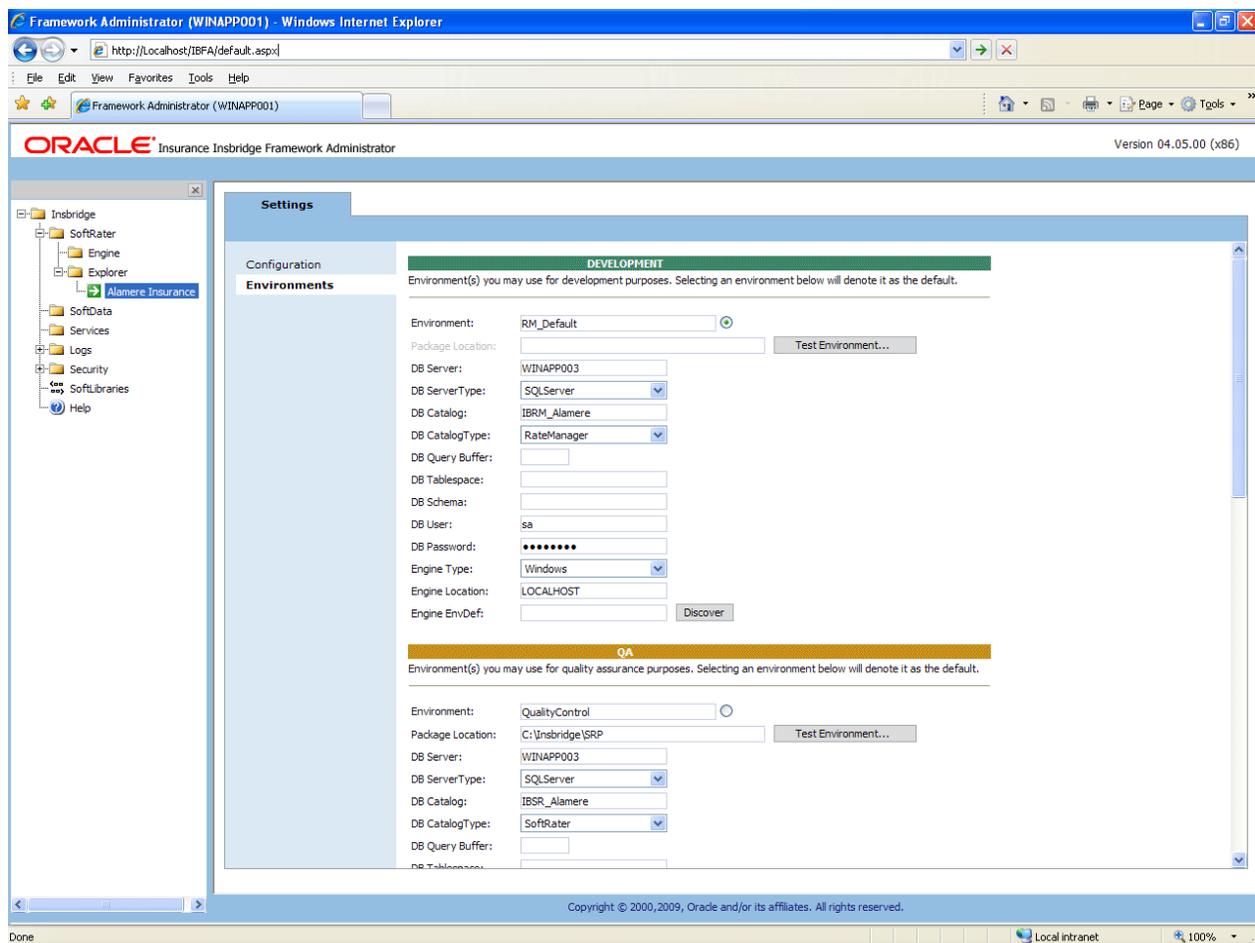


Figure 26 Editing Environment

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

13. **DB Tablespace** is not required for a SoftRater environment
14. The **DB Schema** is the name of the schema that defines the structure of the database. This information may be obtained from the DBA.
15. Enter the **DB User** name and **Password**.
16. Select the **Engine Type**.
17. The **Engine Location** is the location of where you installed the SoftRater engine. You can use the machine name or IP address. For WebSphere, WebLogic or JBoss, you must also include the port. For example, a WebLogic server may have “WBServerName:7001” as the entry.
18. The **Engine EnvDef** is the machine name if the engine is located on a different server. You can use the machine name or IP address.
19. Click **SAVE** to save your entries.

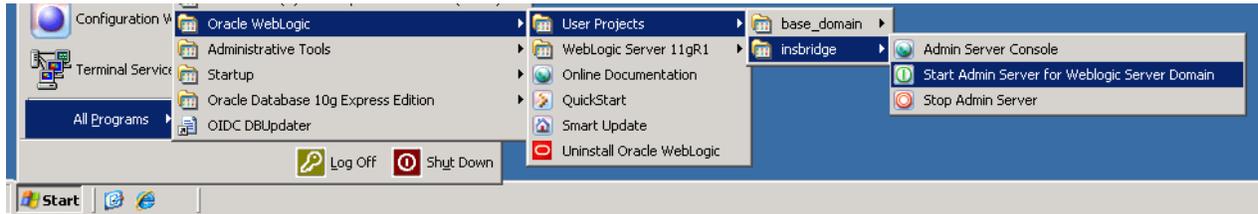
INSTALLATION PROCEDURES – UTILIZING AN ORACLE DATABASE

The following is a check list of the installation steps needed to perform a NEW SoftRater for WebLogic Installation:

1. Start the WebLogic server.
2. Installation of the Required Library.
3. Add the ojsp.jar library.
4. Installation of the .EAR file.
5. Create Oracle database.
6. Create a WebLogic entry in IBSS.
7. Run the Oracle Client on the machine where the IBRU system was installed.
8. Create a WebLogic entry in IBFA.

Step 1: Starting the WebLogic Server

To start the WebLogic server, go to the “**Start Menu→Oracle WebLogic→User Projects→<Your Server Domain>→Start Admin Server for WebLogic Server Domain**”.



NOTE: Please do not close the command prompt window that starts the service. Closing the command prompt window will stop the webserver instance.

Accessing the WebLogic Main Console

The WebLogic Main Console can be accessed once the WebLogic server domain is running by typing <http://<ServerName or IP Address>:<Port>/console> on your browser. You will need the administrator password used when the server domain was created. i.e. <http://localhost:7001/console>

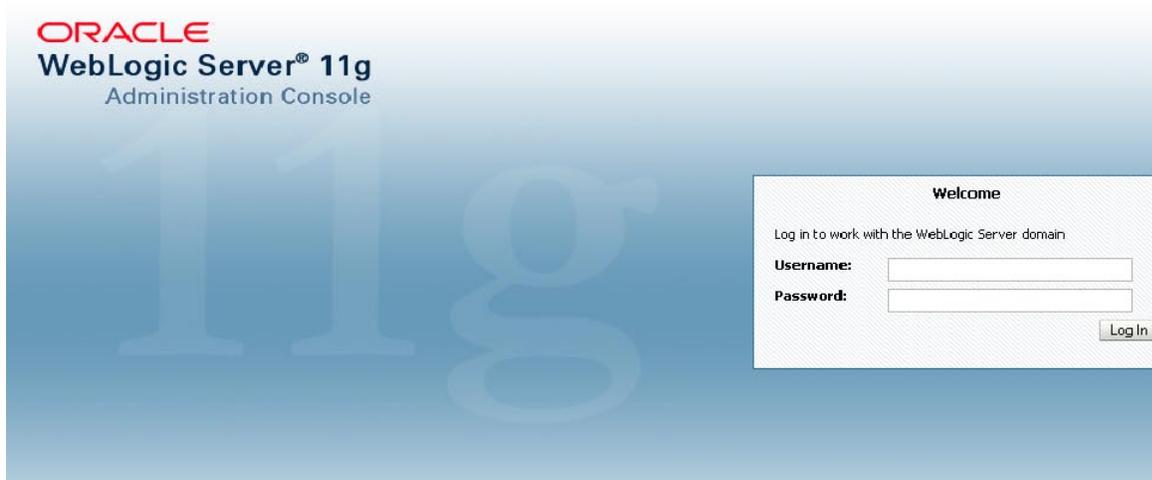


Figure 27 Logging into WebLogic Server

Step 2: Installation of Required Library

The WebLogic Insbridge application requires one WebLogic library to be deployed on to the server prior to the application installation itself. This library will be shipped with the SoftRater for WebLogic application. Place this library anywhere on your disk and then proceed with the installation.

Library	Description
oracle.jsp.next (ojsp.jar)	Oracle Jsp library for ADF applications

Figure 28 Oracle jsp library

Step 3: Adding Libraries

The WebLogic administration console offers multiple configuration options. This guide will focus on the deployments features that can be accessed by clicking the highlighted **Deployments** link on the left hand of the console.

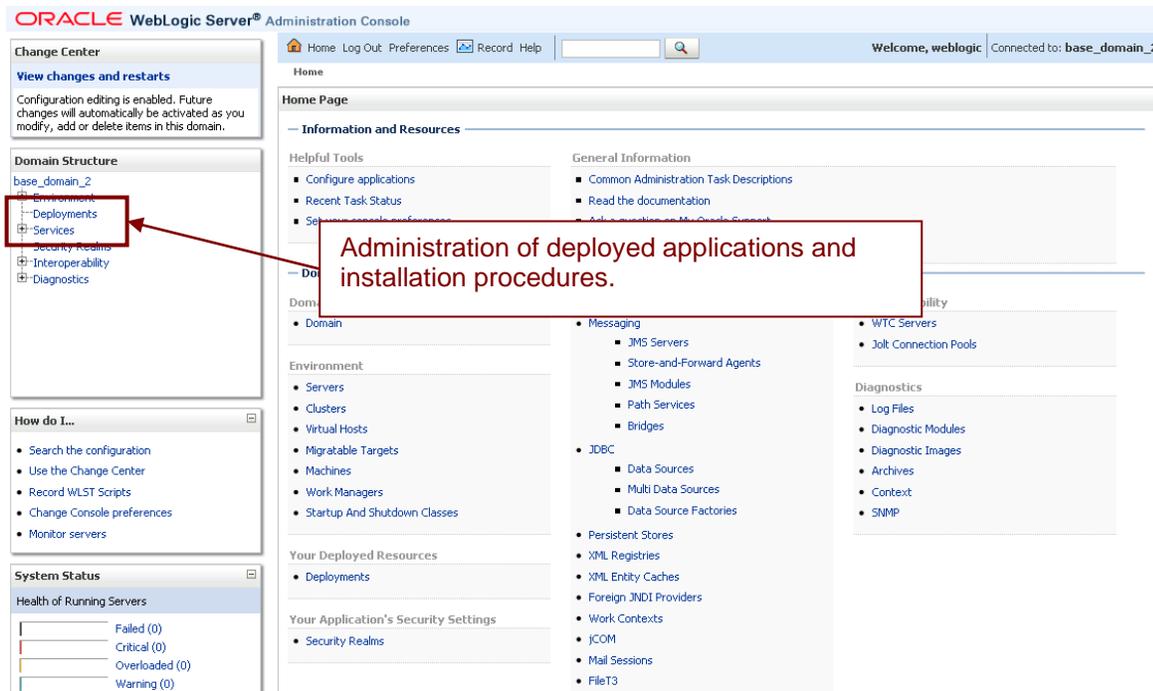


Figure 29 WebLogic Console

9. Click the **Deployments** link. The screen will refresh with the Deployments Page.

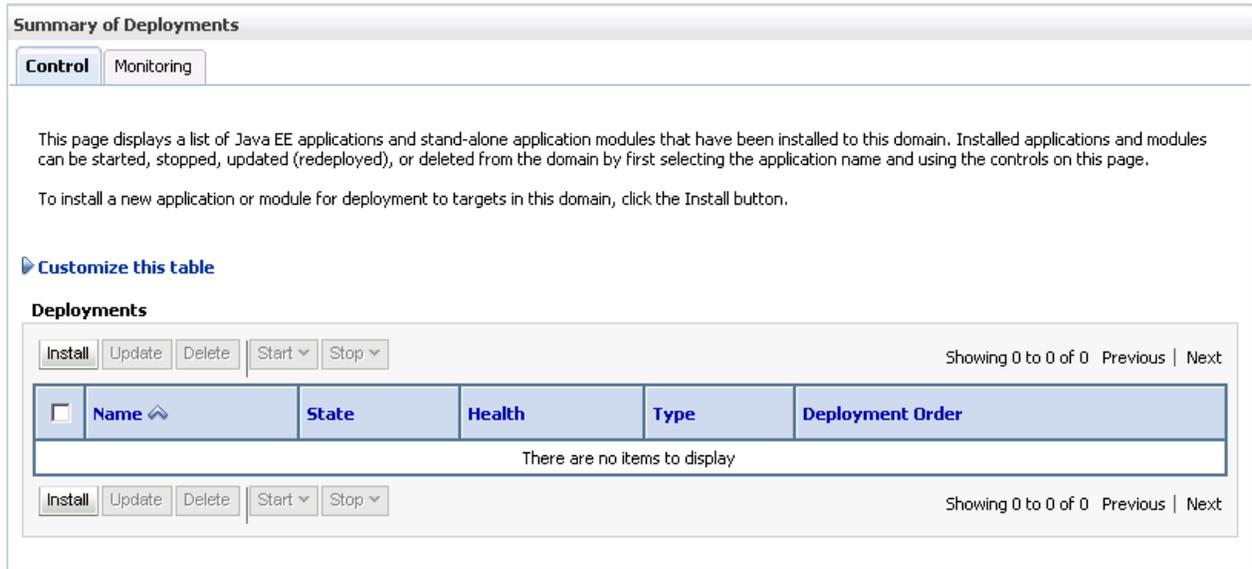


Figure 30 Deployments Page

10. From the Summary of Deployments Page, click the **Install** button. The screen will refresh to the Install Application Assistant page.
11. The list of Locations will be displayed. Select the location where you placed the “ojsp.jar” file.
12. Select the “ojsp.jar” library.

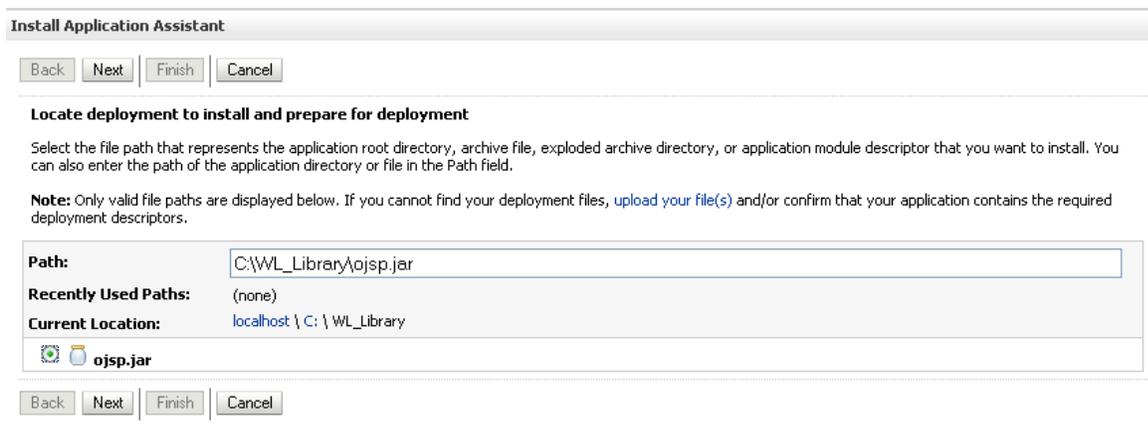


Figure 31 List of Libraries

13. Click the **Next** button.
14. On the **Optional Settings** page, you will need to change the library name to “oracle.jsp.next”. Everything else can be set to the default values click **Finish**.

NOTE: You can navigate back to the previous folder by clicking the hyperlinks in the **Current Location:** path.

The screenshot shows the 'Install Application Assistant' dialog box with the following sections:

- Optional Settings**: You can modify these settings or accept the defaults.
- General**: What do you want to name this deployment? Name: oracle.jsp.next
- Security**: What security model do you want to use with this application?
 - DD Only: Use only roles and policies that are defined in the deployment descriptors.**
 - Custom Roles: Use roles that are defined in the Administration Console; use policies that are defined in the deployment descriptor.**
 - Custom Roles and Policies: Use only roles and policies that are defined in the Administration Console.**
 - Advanced: Use a custom model that you have configured on the realm's configuration page.**
- Source accessibility**: How should the source files be made accessible?
 - Use the defaults defined by the deployment's targets**
 - Copy this application onto every target for me**Recommended selection.
 - I will make the deployment accessible from the following location**Location: C:\nsbridge\Config\ojsp.jar

Provide the location from where all targets will access this application's files. This is often a shared directory. You must ensure the application files exist in this location and that each target can reach the location.

Figure 32 Selecting Defaults

15. After the library has been added, you will be placed on the Summary of Deployments page. The library you added will be listed. Read the messages at the top of the screen and correct any error messages.
16. The library will be active.

Step 4: Installation of the .EAR File

NOTE: For SQL Server 2005, no additional steps are required. For DB2, please make sure you have completed the DB2 preparation requirements. See Chapter4, Preparing for DB2 Installation.

The installation of the Insbridge .EAR File begins in the same way as the installation of the WebLogic library.

5. From the Summary of Deployments Page, click the **Install** button. The screen will refresh to the Install Application Assistant page.
6. The list of Locations will be displayed. Click the location you need to reach the .EAR file.
7. Select the **.EAR** file.

Install Application Assistant

Back Next Finish Cancel

Locate deployment to install and prepare for deployment

Select the file path that represents the application root directory, archive file, exploded archive directory, or application module descriptor that you want to install. You can also enter the path of the application directory or file in the Path field.

Note: Only valid file paths are displayed below. If you cannot find your deployment files, [upload your file\(s\)](#) and/or confirm that your application contains the required deployment descriptors.

Path: C:\Insbridge\Config\IBSS_WL.ear

Recently Used Paths: C:\Insbridge\Config

Current Location: app003 \ C: \ Insbridge \ Config

IBSS_WL.ear

ojsp.jar

Back Next Finish Cancel

Figure 33 Select the Application .EAR

8. Click **Next**.

Step 5: Creating an Oracle Database

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

Before proceeding, please have ready:

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

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

NOTE: *If you are unsure how to create an Oracle database, please consult with your database administrator.*

1. On your Oracle database, run all **DDLs**.
2. On your Oracle database, you will need to run a DT table for each LOB.
3. After all DT tables have been created, please make note of:
 - Schema
 - Instance
 - User name
 - Password

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

Location of DDL Directory

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

Oracle Database Setup

IMPORTANT: *It is **strongly recommended** that any database modification be performed by a qualified database administrator (DBA). The database setup procedures and tasks require the skill set of a database administrator. If you are not a database administrator, please stop. Improper setup may result in unwelcome changes to the database. Please consult with a qualified database administrator before proceeding.*

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

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

Have this information ready:

- The LOBs that your company uses. You will need the ID number for each LOB.
 - Your customer number.
 - Location of the Insbridge files.
- a) Create default tablespace for the Soft Rater database.
 - If a database table needs to be added, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDDL folder. I.e. [INSTALL_DIR]/Insbridge/SoftRater/DDDL. See **Error! Reference source not found.**
 - You will have to replace the TABLESPACE name in the scripts with the tablespace name you used when you created the database.
 - On the DT tables, you will need to create one for every LOB. An example of the format is in the comments of the script. It requires the LOB ID number and the customer number.
 - b) Create user IBSR and assign basic connect and resource grants.

Step 6: Setting up a WebLogic Environment in IBSS

You will be able to access the application by typing <http://<ServerName or IP Address>:70010/IBSS>

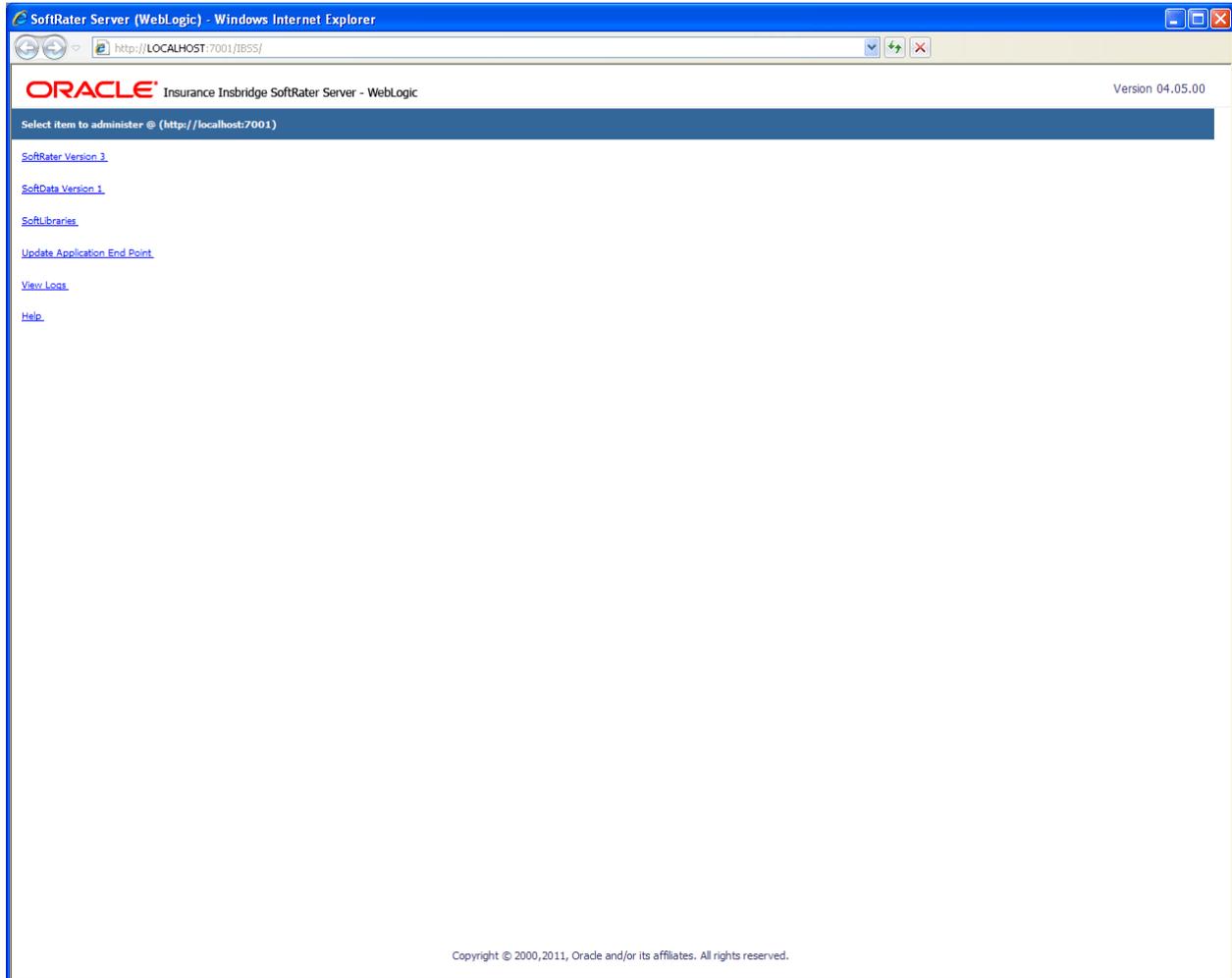


Figure 34 IBSS WebLogic Main Page

NOTE: Notice that if you changed the WebLogic default port (7001) during the Server Domain creation, you should change the default application port on the "[Update Application End Point](#)" option located in the IBSS main page before accessing the application WebServices and methods.

NOTE: The IBSS parameter in the application URL must be capitalized.

To Create/Edit an Environment

Prior to setting up an environment in IBSS you will need the Subscriber ID that you setup in IBFA.

1. Select **SoftRater Version 3** from the Main page. You will be placed on the SoftRater page.
2. Select the **Environment Setup** link.

The **Environment Setup** section allows you to configure rating environments. An environment is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. There is no limit to the number of environments you may have. Required fields will be marked with an asterisk (*).

* Environment Setup

Status:

SELECT ENVIRONMENT	>> Add New Environment <<	<input type="button" value="Go!"/>
Environment Name*	<input type="text" value="SR_WebLogic"/>	Company Id* <input type="text" value="8659"/>
Database Server*	<input type="text" value="LINUXAP003"/>	Port* <input type="text" value="1521"/> Query Block <input type="text"/>
Database Name*	<input type="text" value="IBSR_WL"/>	Schema name** <input type="text" value="PROD_01"/>
Database User Id*	<input type="text" value="sa"/>	
Database Password*	<input type="password" value="●●●●●●●●"/>	
Provider Type	<input type="text" value="ORACLE"/>	
Database Type	<input type="text" value="SoftRater"/>	
Data Dir	<input type="text" value="C:\Insbridge\Prod_Packages"/>	

* Fields are required.

** Fields required for an Oracle DB connection.

<input type="button" value="Save"/>	<input type="button" value="Exit"/>	<input type="button" value="Test Connection!"/>	<input type="button" value="Delete!"/>
-------------------------------------	-------------------------------------	---	--

Figure 35 Environment Setup

3. To create a new environment, use the drop down text box next to **SELECT ENVIRONMENT** and select **>> Add New Environment <<**. If the page does not automatically refresh, click **GO**.
4. When the page refreshes, enter the following information:

Environment Name: A name for the environment.

Database Server: The name of the server that houses the database that packages are loaded to.

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

Database User Id: The username to access the database.

Database Password: The password for the username entered.

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

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

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

Company Id: Your Company's subscriber ID. This must be the same ID number used in IBFA.

Port: Listening port to the target Database Management System.

Default values:

SQL Server – 1433

Oracle – 1521

DB2 – 50000

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

Schema Name: The schema name for the database.

5. When you are finished entering information, click **SAVE**. The environment will be saved and the **Status** field will update.
6. Before you can use the new environment for rating, you will need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the environment page, select the Reset Environments options. You will be placed on the environments page.



To activate changes to an environment, the SoftRater configuration XML file must be reloaded by clicking **EXECUTE**. The screen will refresh and the environment will be reset. Click **EXIT** to return to the SoftRater Administrator menu.

*** Reset Environment Configuration**

Select this method to re-load the SoftRater configuration xml file making any changes to the environment settings now active. NOTE: If program caching is enabled the ALL items currently in the cache will be purged.

Note: Transactions currently in process could be made invalid.

Execute

Exit

Figure 36 Resetting the Environment

NOTE: All information in the cache will be purged and any transactions currently processing could be made invalid.

Step 7: Installation of Oracle Client

If the Oracle Client has already been installed and configured, you can skip this step. Return to the machine where the IBRU system was installed. One instance of the Oracle client is all that is required. If you have more than one Oracle environment that you want to connect, for example a QA environment and a Production environment, you will only need to run the Oracle client once.

Running the Oracle Client

Run the Oracle Client. On the machine where the IBRU system was installed, you will need to run the Oracle client. This will allow IBFA to communicate with the Oracle database.

For a 64-bit environment, please make sure you have the 64-bit Oracle Client.

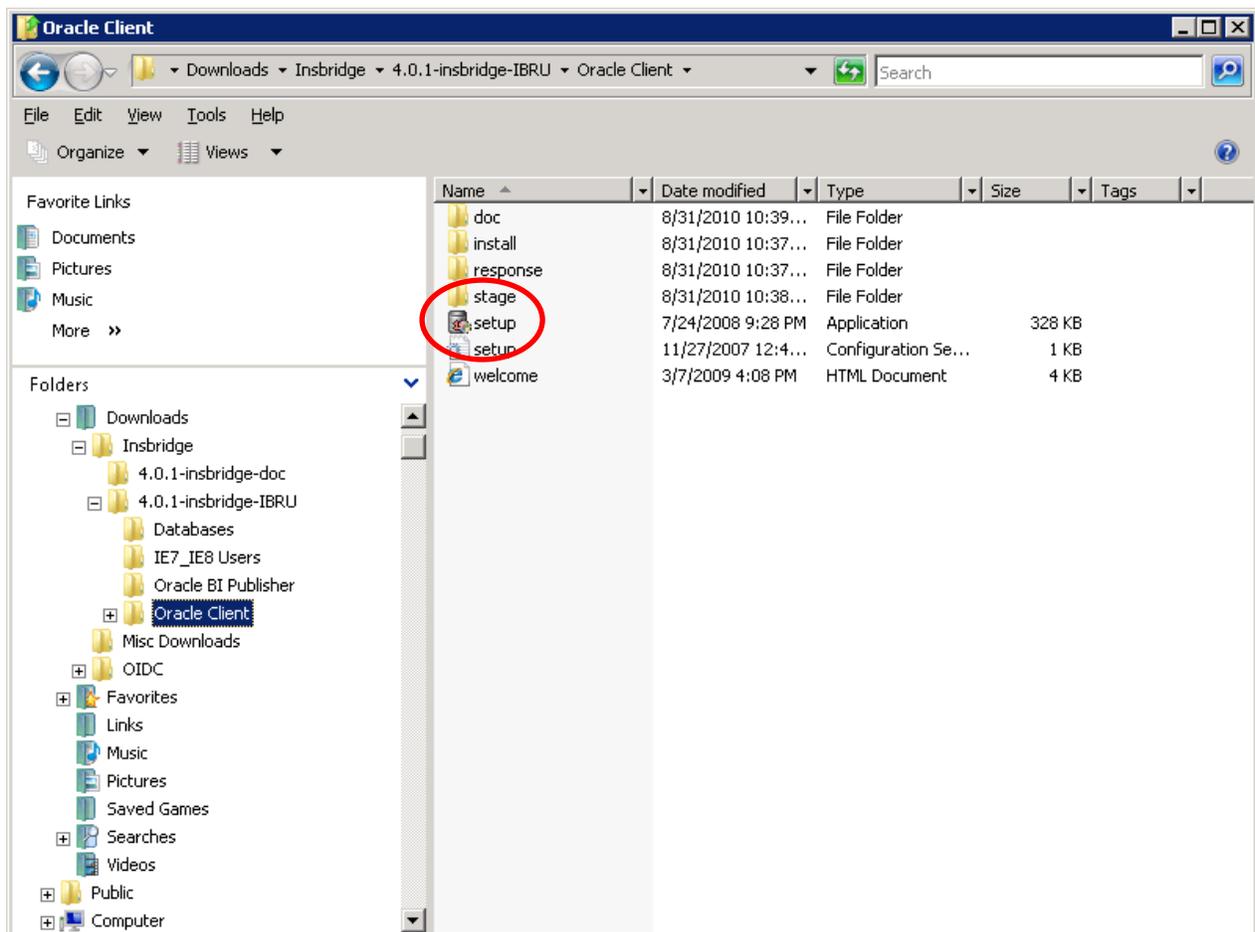


Figure 37 Locating the Oracle Client for 64-bit Installs

1. In the 04.05.00-insbridge-IBRU folder, locate the Oracle Client folder.
2. Select the setup application. The Oracle client installation will begin.

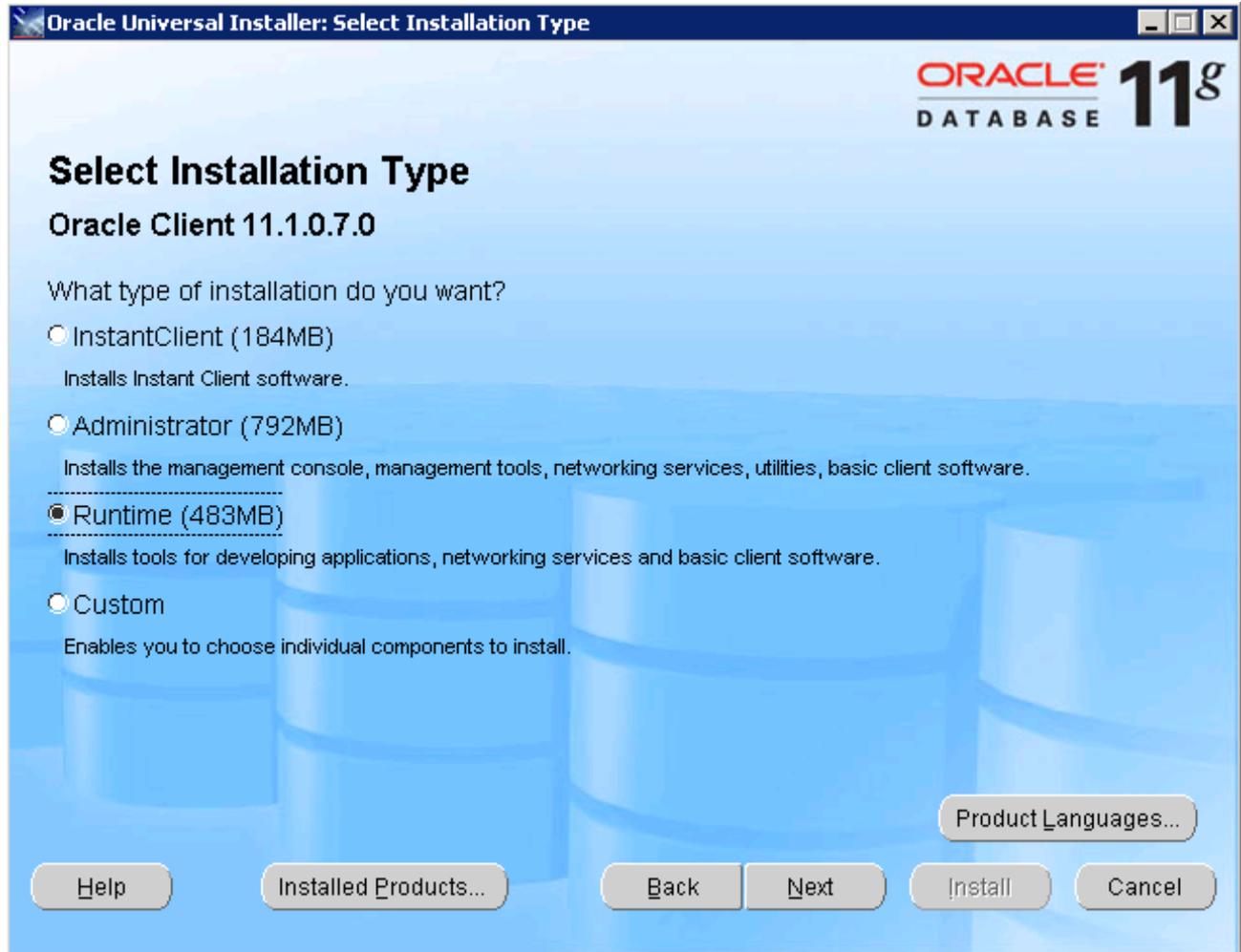


Figure 38 Running the Oracle Client

3. Select **RUNTIME** as the Installation Type.
4. Click **NEXT**.
5. For the Summary – Inside Oracle Providers for .NET, the Oracle Client, you must use a LOCAL DRIVE, i.e. C:\app\oracle-insbridge.
6. Click **NEXT**.
7. You can leave the defaults and **INSTALL**.

Using a DB2 Database

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

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

Step 8: Entering your IBSS Instance in IBFA

IBFA will need to communicate with the IBSS environment. This will allow for packages to be loaded. There are two parts that will need to be completed:

1. Create an environment.
2. Configure the environment.

A SoftRater environment may be completed at installation or can be added at a later time. A SoftRater environment can be on a Windows machine or a Java machine running an application server, such as WebLogic. There is no limit to the number of SoftRater environments that you can have.

1. Enter IBFA.
2. Browse to **SoftRater**→**Explorer**→**Subscriber name**.
3. Click on **Add Environment**.
4. Enter a **Name** and select a **Type**. For example, you can create a 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.

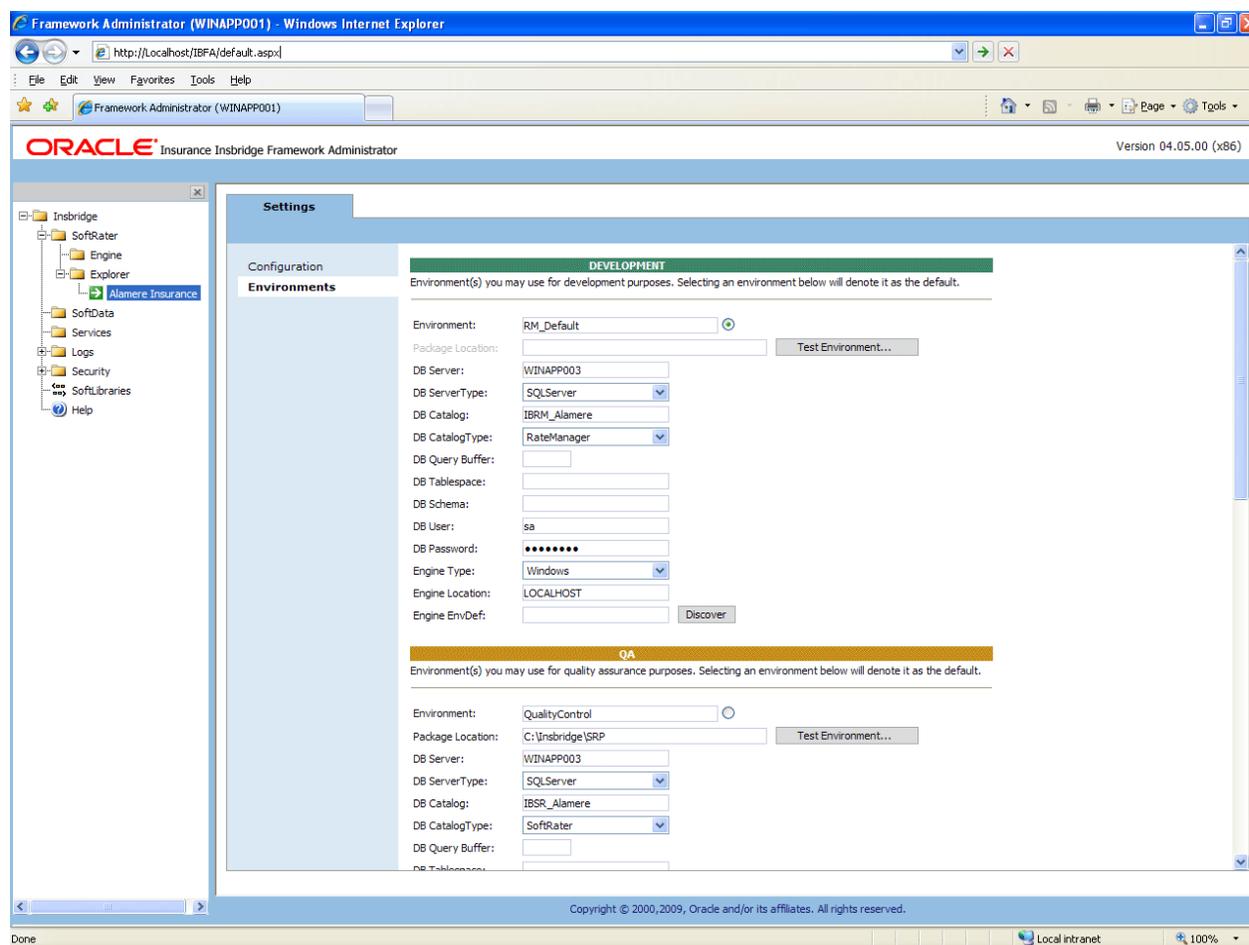


Figure 39 Editing Environment

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

13. **DB Tablespace** is not required for a SoftRater environment
14. The **DB Schema** is the name of the schema that defines the structure of the database. This information may be obtained from the DBA.
15. Enter the **DB User** name and **Password**.
16. Select the **Engine Type**.
17. The **Engine Location** is the location of where you installed the SoftRater engine. You can use the machine name or IP address. For WebSphere, WebLogic or JBoss, you must also include the port. For example, a WebLogic server may have “WBServerName:7001” as the entry.
18. The **Engine EnvDef** is the machine name if the engine is located on a different server. You can use the machine name or IP address.
19. Click **SAVE** to save your entries.

CREATING A SOFTRATER DATABASE

The Insbridge Framework Application container for the SoftRater J2EE EJB contains the JDBC connection drivers that support operational connectivity to the DBMS system listed before. It also contains vendor specific DDLs for the SoftRater operations database schema creation which can be altered by DBA's for setup compliance for varying corporate environments, i.e. TABLESPACE and SCHEMA target definitions.

To obtain Database Definition Language (DDL) scripts for a target DBMS type view the "SoftRater\DDL" subdirectory in the Insbridge IBFA installation directory.

i.e. C:\Program Files\Oracle\IGBU\Insbridge\SoftRater\DDL

Please allow the DBA to review the scripts before attempting to create a SoftRater database schema.

The SoftRater EJB data access system contains all the required JDBC drivers for connectivity to the support DBMS's. TCP/IP connection visibility to the DB Platform is required along with the database server system configured connection PORT for operational use of the SoftRater system. No other supplemental drivers or libraries are needed to establish a connection.

IMPORTANT: *It is strongly recommended that any database modification be performed by a qualified database administrator (DBA). The database setup procedures and tasks require the skill set of a database administrator. If you are not a database administrator, please stop. Improper setup may result in unwelcome changes to the database. Please consult with a qualified database administrator before proceeding.*

Microsoft SQL Server

JDBC Driver Class

"com.microsoft.jdbc.sqlserver.SQLServerDriver"

Supported Versions – 2005 SP/2 and 2008 SP/1

User Account Requirements

Create Table
Create Index
Execute on the SoftRater User Defined Stored Procedures

ORACLE

SoftRater database schema is support by all available ORACLE database platforms.

JDBC Driver Class

"oracle.jdbc.driver.OracleDriver"
Using prefix jdbc:oracle:thin:

Supported Versions – 10g, 11g

User Account Requirements

Create Table
Create Index
Query access to “SYS.OBJ\$”

IBM DB2

SoftRater database schema is supported on all available DB2 database platforms.

JDBC Driver Class

“com.ibm.db2.jcc.DB2Driver”
For Native AS400 – “com.ibm.as400.access.AS400JDBCdriver”

Supported Version – 9.1

User Account Requirements

Create Table
Create Index
Query access to “SYSIBM.SYSTABLES”

Configuration Settings

- **Required**
The query dynamics of the SoftRater system requires some modification to Configuration settings. The following Performance Configurations parameters required to the target SoftRater database.
Instance Level – ASLHEAPSZ >= 1024
Instance Level – QUERY_HEAP_SZ => 10240
Database Level – APPLHEAPSZ >= 1024
- **Recommended**
The query dynamics of the SoftRater system will benefit from the following modification to Configuration settings.

Instance Level – INTRA_PARRALLEL (Yes) – For Symmetrical Processing Machines (CPU >=2)

Database Level – DFT_DEGREE (-1) – For Symmetrical Processing Machines (CPU >=2). Allow the optimizer to determine the degree of intra-partition parallelism based on the number of processors and the type of query.

Native z/OS

Support for IBM DB2 for native z/OS requires a specific set of the DDL scripts. They are labeled in the `ddl\db2` directory with the ZOS DB2.ZOS prefix. DBA's should review these scripts, starting with the `DB2.ZOS.SETUP.sql` file that contains create templates for default; STORAGE GROUP, DATABASE, default TABLESPACE. All other table create scripts can be reviewed, altered and executed in any other to be consistent with chosen database standards.

UPGRADING THE APPLICATION

Oracle Insurance Insbridge Rating and Underwriting Release 4.1 has been tested and certified on WebLogic 10.3.1.

Insbridge Rating and Underwriting is no longer tested and certified on WebLogic 9.2.

UPGRADE NOTICE

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

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

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

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

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

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

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

These updates are for the SoftRater for Java engines only.

UPGRADING FROM A PREVIOUS RELEASE

Upgrading from Oracle Insurance Insbridge Rating and Underwriting **Release 3.13.4 or previous** to release 4.1 will require the previous .EAR and config files to be removed. The new .EAR file can then be deployed and the new config file must be implemented.

WSDLs have been updated in this release. Any application making a call to SoftRater will need to be updated with the new WSDL. If upgrades are done to SoftRater for WebLogic without updating the calling application, the calling application will fail.

NOTE: UPGRADE YOUR TEST ENVIRONMENT PRIOR TO PRODUCTION.

1. Make a back-up copy of the current config file. The configuration information will need to be re-entered in IBSS. The updated config file will not contain this information. This information cannot be directly imported but a copy of the original file may be helpful when re-entering.
2. Stop the WebLogic Service.
3. Delete the old .EAR file.
4. Start the WebLogic Service.
5. Remove the old config file. Unzip the SoftRater for WebLogic file. Please see Locating the Configuration Files.
6. Verify that the system property is in the WebLogic Server. Please see Adding a System Property to WL Server.
7. Install the required library. Please see Step 2: Installation of Required Library.
8. Install the new .EAR file. Please see Step 3: Adding Libraries.
9. Enter IBSS. You will need to re-enter the config information. Please see the Insbridge Rating and Underwriting SoftRater Server Guide.
10. If necessary, obtain any WSDL information from IBSS and update any calling application.
11. Test your configuration and updated calling applications before deploying to production.

NOTE: *You do not need to do an upgrade if you are running release 3.13.5, 4.0, or 4.1.*

SQL SERVER UPGRADE

If you are utilizing SQL Server and want to keep your current Environment settings, you will need to edit the `insbridge.net.softraterconfig.xml` file.

1. Deploy the new .EAR file.
2. Open the `insbridge.net.softraterconfig.xml`. The `insbridge.net.softraterconfig.xml` file will be located in the folder you setup when you initially installed SoftRater for WebLogic. For example, `C:\Insbridge\config`.
3. Make a back-up copy of this file.
4. In the `insbridge.net.softraterconfig.xml` file, find this section:

```
<jdbcDriver provider="1" name="SQLSERVER">  
  <jdbcDriverClassName>com.microsoft.jdbc.sqlserver.SQLServerDriver</jdbcDriverClassName>  
  <jdbcUrlPrefix>jdbc:microsoft:sqlserver://</jdbcUrlPrefix>  
  <jdbcFetchSize>25</jdbcFetchSize>  
</jdbcDriver>
```

And replace it with this:

```
<jdbcDriver provider="1" name="SQLSERVER">  
  <jdbcDriverClassName>com.microsoft.sqlserver.jdbc.SQLServerDriver</jdbcDriverClassName>  
  <jdbcUrlPrefix>jdbc:sqlserver://</jdbcUrlPrefix>  
  <jdbcFetchSize>25</jdbcFetchSize>  
</jdbcDriver>
```

5. Restart the Application Server.

If you do not need your current environments:

1. Copy the existing `insbridge.net.softraterconfig.xml` and park it in a safe place. This is precautionary.
2. Copy the `insbridge.net.softraterconfig.xml` from the SoftRater for WebLogic 4.5 zip file.
3. Paste the new file over the current file. The `insbridge.net.softraterconfig.xml` file will be located in the folder you setup when you initially installed SoftRater for WebLogic. For example, `C:\Insbridge\config`.

If this is a new installation, you are not required to do any additional steps.

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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INDEX

A

- Accessing
 - WebLogic Console, 26, 43
- Add New Environment
 - IBSS, 36, 51
- Adding
 - System Property, 23

C

- Collation and Sort Order
 - SQL Server, 11, 31
- Command Prompt Window
 - Closing, 26, 43
- Config File
 - Locating, 9
- config/ddl subdirectory, 60
- Configuration Settings
 - DB2, 61
 - DB2 Modifications, 61
- Configure
 - Rating Environments, 36, 51
- Creating
 - Environment Setup, 36, 51

D

- Database
 - IBM DB2 Support, 61
 - MS SQL Support, 60
 - ORACLE Support, 60
 - Permissions, 10
 - Security, 10
 - SoftRater, 60
- Database Definition Language Scripts, 60
- Database Types
 - Environment Setup, 37, 52
- DB2
 - Installation Preparations*, 30, 47
 - zOS, 61
- DB2 Database
 - Configuration Settings, 61
 - JDBC Driver Class, 61
 - Recommendations, 61
 - SoftRater Database Schema, 61
 - Supported Version, 61
 - User Account Requirements, 61
- DB2 Platform
 - Query Block Limits, 37, 52
- DB2 Prefix
 - Added to Filename*, 12
- DBA, 60
- DBMS, 60

- DDL, 60
- DDL scripts
 - zOS on DB2, 61
- ddl\db2 Directory, 61
- Deployments
 - WebLogic Console, 27, 44
- DINSBRIDGE_APP_DIR
 - Adding, 23
- Directory
 - ddl\db2, 61

E

- E-Delivery
 - IBRU, 12
 - Required Programs, 12
- Editing
 - Environment Setup, 36, 51
 - WebLogic Console, 27, 44
 - WebLogic Server, 23
- Edition Notice, 2
- Environment Setup
 - Creating, 36, 51
 - Database Types, 37, 52
 - Editing, 36, 51
 - IBSS, 36, 51
 - Provider Types, 37, 52
 - Query Block, 37, 52
- Example bat file, 12

I

- IBRU
 - E-Delivery, 12
- IBSS, v
 - Add New Environment, 36, 51
 - Environment Setup, 36, 51
- Insbridge SoftRater Server, v

J

- JDBC Connection Drivers, 60

M

- Microsoft SQL Server, 11
- Mixed Mode Authentication
 - Sql Server, 11

O

- ORACLE
 - SoftRater Database Schema, 60
- ORACLE Database
 - JDBC Driver Class, 60

- Supported Version, 61
- User Account Requirements, 60
- Overview
 - Package, vi

P

- Package
 - Environment, vii
 - Overview, vi
- Part Numbers
 - E-Delivery, 12
- PDF Reader
 - E-Delivery, 12
- Performance Configurations Parameters
 - SoftRater Database, 61
- Provider Types
 - Environment Setup, 37, 52

Q

- Query Block
 - Environment Setup, 37, 52
- Quick List, 25, 42

R

- Reloading
 - SoftRater Page Environment, 38, 53
- Requirements, 9
 - DB2 Database, 61
 - ORACLE Database, 60
 - SoftRater EJB Data Access System, 60
 - SQL Server, 60
 - TCP/IP Connection, 60
- Reset Environments
 - SoftRater Page, 38, 53

S

- sa account
 - SQL Server Enterprise Manager, 31
- Scripts
 - Database Definition Language, 60
- Security
 - Database, 10
- Settings*
 - SQL Server, 11
- SoftRater
 - IBSR, 10
 - Supported Databases, 60, 61
- SoftRater Database, 60
- SoftRater Packages

- Environments, vii
- SoftRater Page
 - Reloading Environment, 38, 53
 - Reset Environment, 38, 53
- SQL Server
 - Collation and Sort Order, 11, 31
 - JDBC Driver Class, 60
 - Mixed Mode Authentication, 11
 - Requirements, 11
 - Residing on Separate Host, 11
 - Settings*, 11
 - SoftRater Database Schema, 60
 - Supported Version, 60
 - User Account Requirements, 60
 - User Accounts, 34
- SQL Server Account
 - ibru, 31
- SQL Server Enterprise Manager
 - sa Privileges, 31
- Starting
 - WebLogic Server, 26, 43
- System
 - Adding Property, 23

T

- TCP/IP Connection
 - To DB Platform, 60

U

- Unzip Utility
 - E-Delivery, 12
- User Accounts
 - SQL Server, 34

V

- VFS Definition, vii
- Virtual File Server Definition, vii

W

- WebLogic Port*
 - 7001, 35, 50

Z

- z/OS
 - BD2, 61
- ZOS DB2.ZOS, 61