

**Oracle Insurance**

**Insbridge Rating and  
Underwriting**

**SoftRater for WebSphere  
Installation Guide**

Release 4.7.1

November 2013

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Oracle Insurance Insbridge Rating and Underwriting SoftRater for WebSphere Installation Guide

Release 4.7.1

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## PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting SoftRater for WebSphere Installation Guide*. SoftRater for WebSphere is an EJB application that can be installed on an IBM WebSphere Application Server. SoftRater is the multi-platform rating engine component within the Insbridge Rating and Underwriting System (IBRU) that executes the rating and underwriting instructions as defined by the user in RateManager.

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 SoftRater Server.

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**NOTE:** *SoftRater for WebSphere has been tested and supports WebSphere 7.0 utilizing Windows 2008 64-bit.*

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## 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 WebSphere.

## 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:

### RateManager Installation

- **RateManager for Windows** – Installs RateManager and the Insbridge Framework Administrator (IBFA) in a Windows environment and utilizes IBFA for local rating. This Windows only environment uses a SQL Server database.

## SoftRater Installation

- **SoftRater for Java Installation** – Deploys Insbridge SoftRater Server (IBSS) to an application server; WebLogic, WebSphere or JBoss, using a SQL Server database, or an Oracle database, or a DB2 database.
- **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 using a SQL Server database.

## Upgrading a Current Installation

- **Upgrade** – This installation is for existing customers and will take their current version of IBRU up to version 04.07.01.

**This guide is for a Full SoftRater for Java Installation utilizing WebSphere.**

## 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 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

The following text conventions are used in this document:

Convention	Description
<b>bold</b>	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.
<code>monospace</code>	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.

<b>Edition</b>	<b>Publication Number</b>	<b>Product Version</b>	<b>Publication Date</b>	<b>Comment</b>
1 <sup>st</sup> Edition	P01-706-01			
2 <sup>nd</sup> Edition	P01-706-02	V 3.5		
3 <sup>rd</sup> Edition	P01-706-03	V 3.6	03/14/2006	Update 3.6
4 <sup>th</sup> Edition	P01-706-04	V 3.6	08/09/2006	Update logo
5 <sup>th</sup> Edition	P01-706-05	V 3.7	10/05/2006	Update to 3.7
6 <sup>th</sup> Edition	P01-706-06	V 3.8	7/19/2007	Update to 3.8
7 <sup>th</sup> Edition	P01-706-07	V 3.8.3	10/19/2007	Update to 3.8.3
8 <sup>th</sup> Edition	P01-706-08	V 3.8.5	November 2007	Update to 3.8.5
9 <sup>th</sup> Edition	P01-706-09	V 3.8.7	January 2008	Update to 3.8.7
10 <sup>th</sup> Edition	P01-706-10	V 3.8.8	March 2008	Update to 3.8.8
11 <sup>th</sup> Edition	P01-706-11	V 3.9	May 2008	Update to 3.9
12 <sup>th</sup> Edition	P01-706-12	V 3.10.0	September 2008	Update to 3.10
13 <sup>th</sup> Edition	P01-706-13	V 3.11	December 2008	Update to 3.11
14 <sup>th</sup> Edition	P01-706-14	V 3.12	July 2009	Update to 3.12
15 <sup>th</sup> Edition	P01-706-15	V 3.13	November 2009	Update to 3.13
16 <sup>th</sup> Edition	P01-706-16	R 4.0	April 2010	Update to 4.0
17 <sup>th</sup> Edition	P01-706-17	R 4.0.1	August 2010	Update Release
18 <sup>th</sup> Edition	P01-706-18	R 4.1	December 2010	Update Release
19 <sup>th</sup> Edition	P01-706-19	R 4.5	May 2011	Update Release
20 <sup>th</sup> Edition	P01-706-20	R 4.5.1	September 2011	Update Release
21 <sup>st</sup> Edition	P01-706-21	R 4.6	May 2012	Update Release
22 <sup>nd</sup> Edition	P01-706-22	R 4.6.1	November 2012	Update Release
23 <sup>rd</sup> Edition	P01-706-23	R 4.7	September 2013	Update Release
24 <sup>th</sup> Edition	P01-706-24	R 4.7.1	November 2013	Update Release

# 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 WebSphere installation**
- **Access to the server where WebSphere was installed**
- **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 04.07.01 Insbridge IBRU folder.**
- **If utilizing Oracle, you need: DB Catalog name, port number, DB Schema name**
- **If utilizing DB2, you need: DB Catalog name, port number, query block size (heap), DB Schema name**
- **Subscriber ID created in IBFA**
- **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 WebSphere.

## ORACLE SOFTWARE DELIVERY CLOUD

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 Oracle Software Delivery Cloud download page.

Documentation from Oracle Software Delivery Cloud 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** – Required for all RateManager installations
- **SoftRater for WebSphere** – Required if you are using WebSphere
- **SoftRater for WebLogic** – Required if you are using WebLogic
- **SoftRater for JBoss** – Required if you are using JBoss
- **Documentation** – It is recommended that you download the documentation. Installation guides and user guides are located here.

#### The 04.07.01-Insbridge-IBRU folder contents:

- **Databases**
  - ◆ DB2
    - SoftRater: IBSR
      - DDLs
      - Update: usp\_IBSR\_v04.07.00.db2
  - ◆ Oracle
    - SoftRater: IBSR
      - DDL
      - Update: usp\_IBSR\_v04.07.00.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\_v04.05.01.sql
      - Update: usp\_IBSR\_v04.06.00.01.sql
- **IE7\_IE8 Users**
  - ◆ Insbridge RateManager Setup Document PDF
  - ◆ RateManager\_IE7\_IE8.exe
- **Oracle BI Publisher**
  - ◆ OBI\_PUBLISHER.exe
- **Oracle Client**
  - ◆ Oracle\_client.exe
- **Oracle Insurance: Insbridge Rating and Underwriting.exe**

No license file is required.

**The 04.07.01-Insbridge-jboss folder contents:**

- IBSS.EAR
- Insbridge.net.softraterconfig.xml

**The 04.07.01-Insbridge-was folder contents:**

- IBSS.EAR
- Insbridge.net.softraterconfig.xml

**The 04.07.01-Insbridge-wbl folder contents:**

- IBSS.EAR
- Insbridge.net.softraterconfig.xml

License files are no longer 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.

**Internet Explorer**

IBSS and IBFA are accessed via web browser. Please verify that you are using Internet Explorer 8 or 9 (32-bit). As of release 04.07.01, Internet Explorer 8 and 9 (64-bit) is not supported.

# SOFTRATER FOR WEBSPHERE INSTALLATION

Installing SoftRater for WebSphere will require that you:

1. Set up WebSphere and deploy the SoftRater for WebSphere .EAR file and config file. There are five steps in setting up WebSphere and deploying SoftRater.
2. Implement the database and enter the configuration information in IBSS and IBFA.
  - a. Oracle Database
  - b. SQL Server Database
  - c. IBM DB2

SoftRater for WebSphere can utilize either database. The installation procedures are similar, but there are different procedures for each database type. Please follow the implementation for your database type.

### Setting up and Deploying in WebSphere

**Step 1:** Placing the Configuration Files

**Step 2:** Create INSBRIDGE\_APP\_DIR in Name Space Bindings

**Step 3:** Installing the EAR File

**Step 4:** Test Connection

### Implementing a SQL Server Database

**Step 1:** Restoring IBRU Databases in SQL Server

**Step 2:** Setting up a WebSphere Environment in IBSS

**Step 3:** Entering your IBSS Instance in IBFA

### Implementing an Oracle Database

**Step 1:** Creating an Oracle Database

**Step 2:** Setting up a WebSphere Environment in IBSS

**Step 3:** Installation of Oracle Client

**Step 4:** Entering your IBSS Instance in IBFA

### Implementing an IBM DB2 Database

**Step 1:** Creating a DB2 Database

**Step 2:** Creating a Shared Library in WebSphere.

**Step 3:** Setting up a WebSphere Environment in IBSS

**Step 4:** Installation of DB2 Client

**Step 5:** Entering your IBSS Instance in IBFA

# SETTING UP WEBSPHERE

WebSphere 7.0 should be up and running prior to deploying the .EAR file. There are five steps that should be performed in WebSphere prior to implementing the database. All steps are required.

- **Step 1:** The Configuration Files must be placed in a static location
- **Step 2:** Create INSBRIDGE\_APP\_DIR in Name Space Bindings
- **Step 3:** Installing the EAR File
- **Step 4:** Test Connection

## STEP 1: PLACING THE CONFIGURATION FILES

We suggest creating an Insbridgeconfig folder but you may use any folder name you want and you can place the folder any where you want. This folder holds the necessary files for the SoftRater for WebSphere installation. Take note of the location and make sure you have created this folder prior to running the installation.

- For a Windows environment, C:\Insbridge\config
- For a Linux environment, home/Insbridge/config

---

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

---

An instance folder must be placed under the configuration folder. We suggest creating an Insbridge config instance folder but you may use any folder name you want. The folder must be under the config folder. Take note of the location and make sure you have created this folder prior to running the installation. This location serves as the instance application directory.

- For a Windows environment, C:\Insbridge\config\instance
- For a Linux environment, home/Insbridge/config/instance

---

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

---

### Placing the Configuration Files

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

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

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

The instance folder will not have any files placed in it.

---

**NOTE:** *It is important that the configuration path specified in the section Step 2: Create INSBRIDGE\_APP\_DIR in Name Space Bindings of this document contain both the application and configuration files. These files need to be placed where you specify in the standalone file.*

---

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

## STEP 2: CREATE INSBRIDGE\_APP\_DIR IN NAME SPACE BINDINGS

SoftRater uses an XML configuration (insbridge.net.softraterconfig.xml) file to store information in the configured rating environments. This file needs to be accessible to the Insbridge Rating and Underwriting SoftRater Server (IBSS) in order to operate. The location to define where the config file is located is stored using a Name Space Binding string in the WebSphere server configuration.

1. To create the INSBRIDGE\_APP\_DIR string, from the WebSphere Admin console, browse to the following location:

Environment → Naming → Name Space Bindings

2. Change the scope to the **Server** level and click **Apply**.

**Name Space Bindings**

Use this page to configure a name binding of a constant string value, an enterprise bean, a CORBA CosNaming Naming Context or CORBA leaf node object, or an object that can be looked up by using JNDI.

Scope: Cell=**DRAJASEK-INCell01**, Node=**DRAJASEK-INNode01**, Server=**server1**

Show scope selection drop-down list with the all scopes option

Scope specifies the level at which the resource definition is visible. For detailed information on what scope is and how it works, [see the scope settings help](#).

Node=DRAJASEK-INNode01, Server=server1

Preferences

Maximum rows  
20

Retain filter criteria

Show items at the following authorization group level:  
All Roles

Apply Reset

New Delete

Select	Name	Scope	Binding type
	None		

Figure 1 Changing Scope to Server

3. Once you have changed to the server level, click **New**.

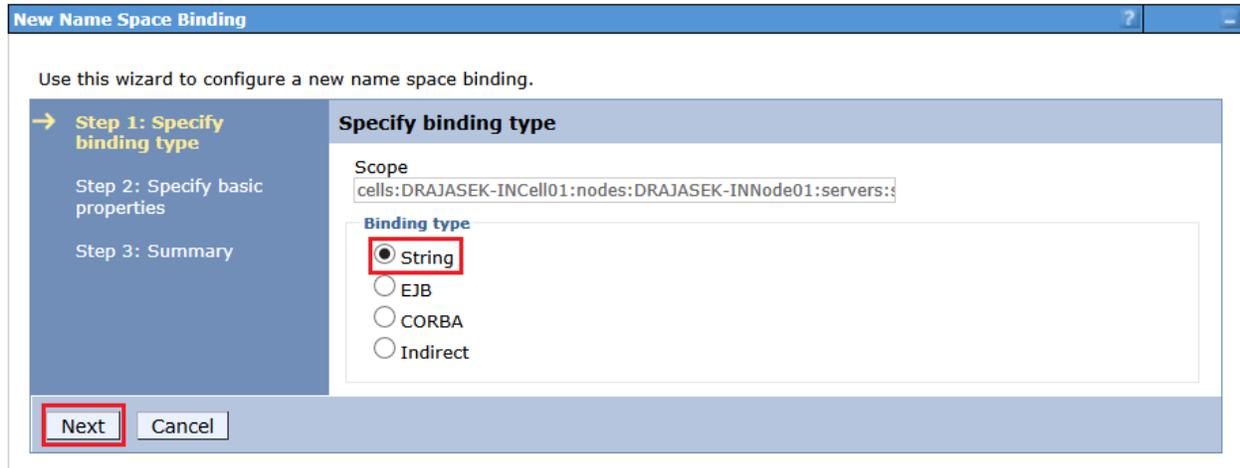


Figure 2 Creating a New Name Space

4. Select String and then click **Next**.

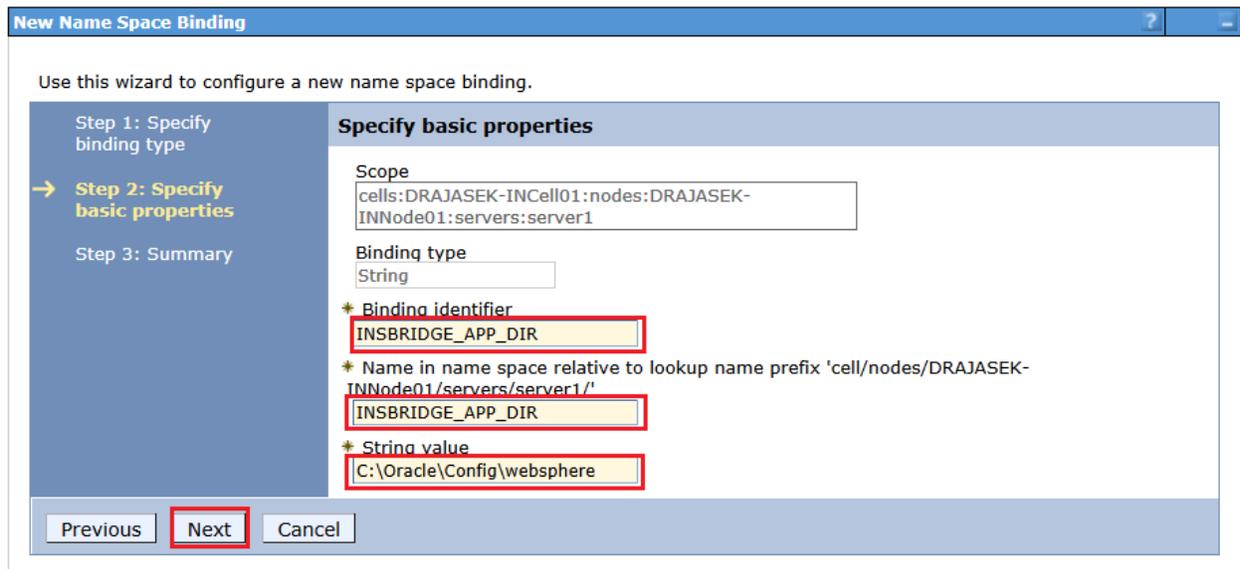


Figure 3 Create Name Space Binding

5. Create a Name Space Binding and Binding Identifier at the server level called INSBRIDGE\_APP\_DIR. The actual string value is the directory path location where the insbridge config file was placed for example, C:\Insbridge\config.
6. Then select **Next**

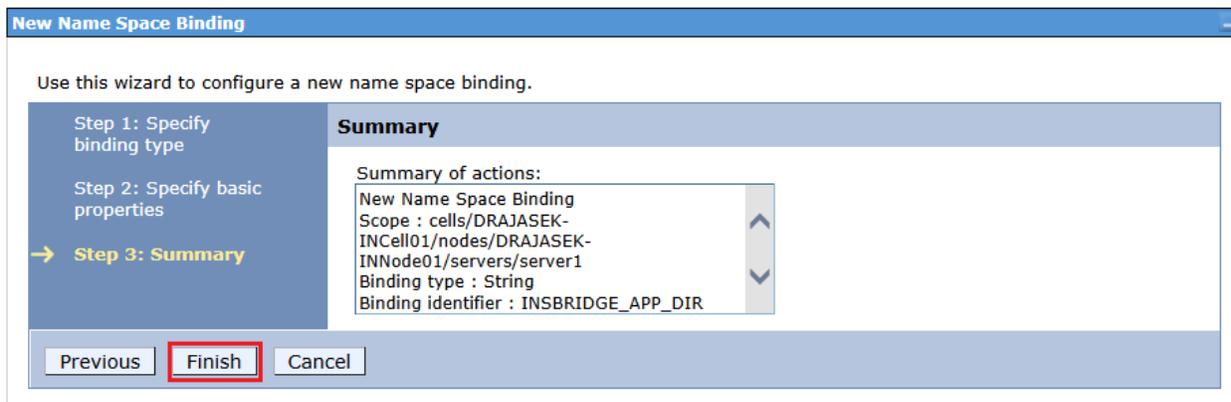


Figure 4 Finish Creating Name Space Binding

7. Click **Finish**.
8. Return to the Name Space Bindings page. A second string must be created, INSBRIDGE\_INSTANCE\_APP\_DIR.
9. Change the scope to the **Server** level and click **Apply**.
10. Once you have changed to the server level, click **New**.
11. Select String and then click **Next**.
12. Create a Name Space Binding and Binding Identifier at the server level called INSBRIDGE\_INSTANCE\_APP\_DIR. The actual string value is the directory path location where the Instance file was placed for example, C:\insbridge\config\instance
13. Then select **Next**
14. Click **Finish**.
15. After creating both the Name Space Bindings, Save to the master configuration.

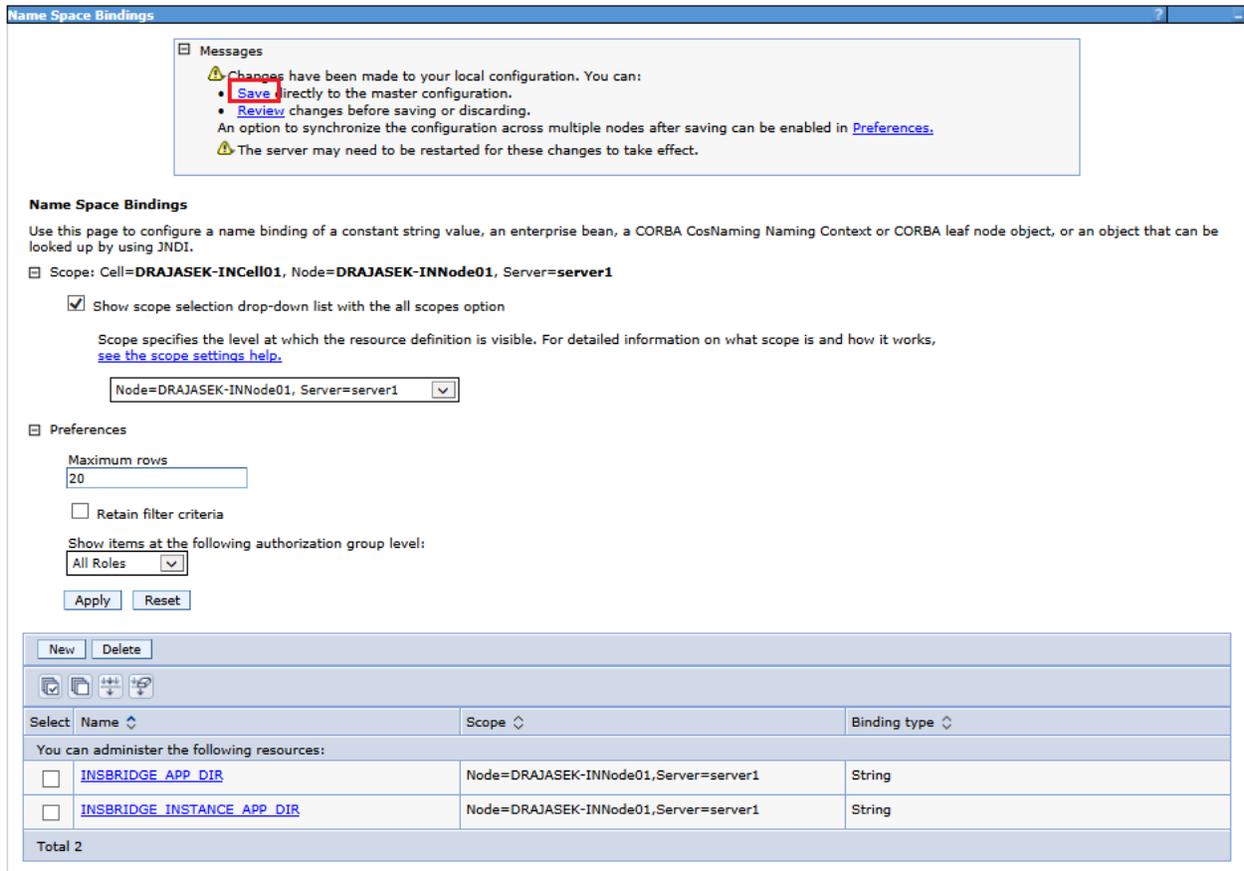


Figure 5 Saving to the Master File

If the application is being deployed to a cluster, the same procedure needs to be followed to create Name Space Binding for all the servers in the Cluster separately.

16. Once these changes are saved, restart all the servers in order for these changes to take effect.

### STEP 3: INSTALLATION OF THE .EAR FILE

1. Log on to the Administrative Console, for example: [http://WAS\\_SERVER:9080/admin/](http://WAS_SERVER:9080/admin/).
2. Select Applications > Application Types > WebSphere Enterprise Applications.
3. Click Install.
4. Select the location where you placed the .EAR file and select Next.

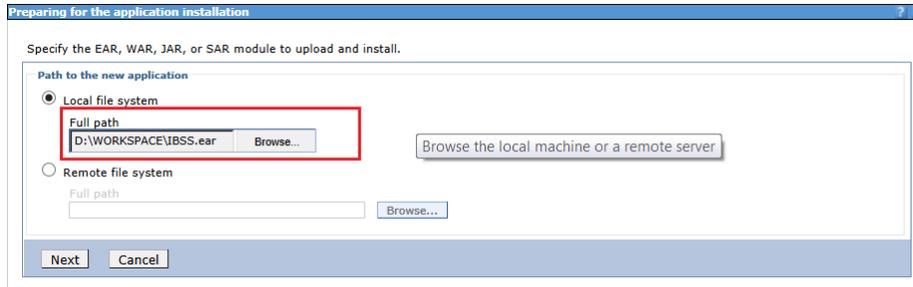


Figure 6 Installing the EAR File

5. Select Fast Path installation process.

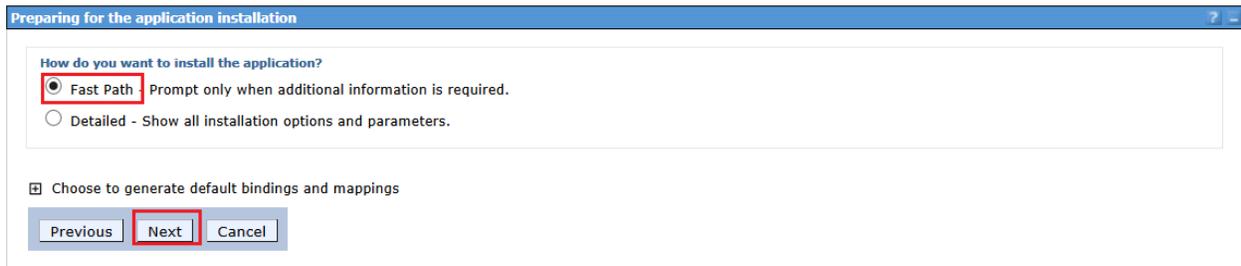


Figure 7 Selecting Fast Path Installation

6. Click Next.
7. Select the check boxes “Deploy Enterprise Beans” and “Deploy Web services”.

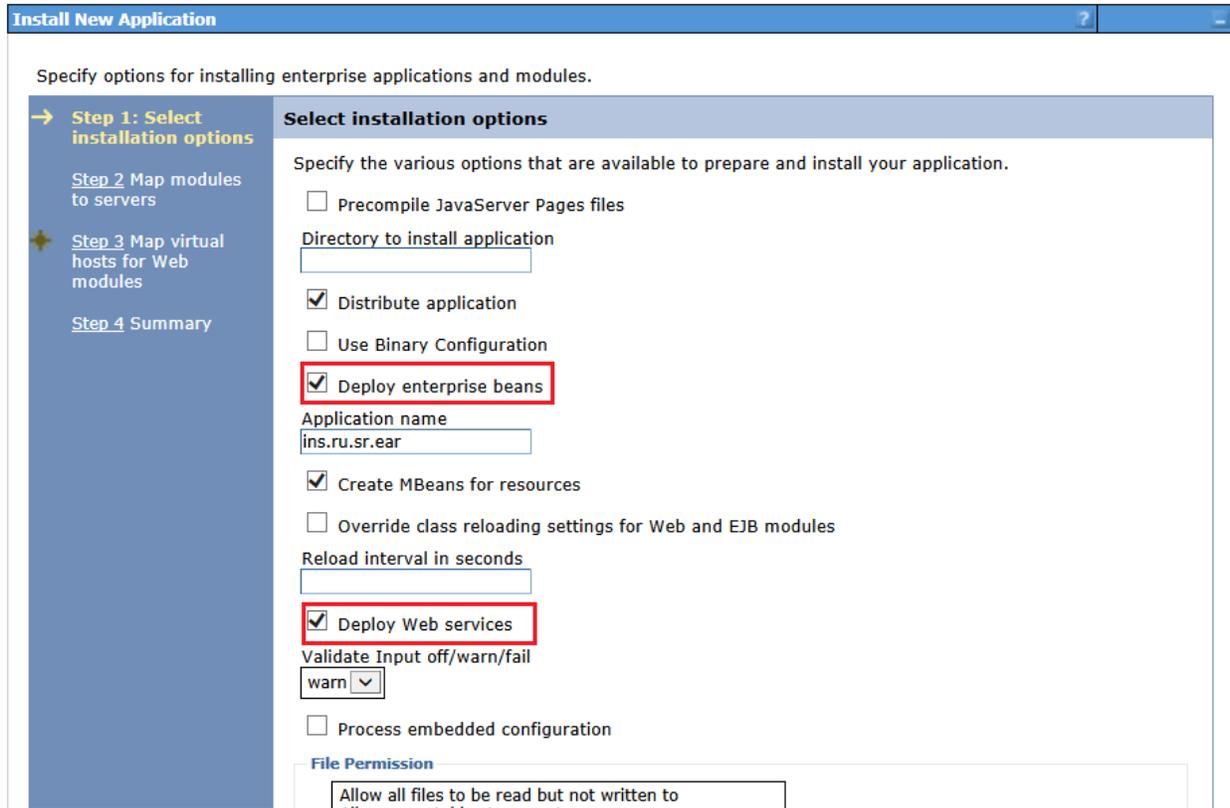


Figure 8 Selecting Install Options

8. Click Next.
9. Select the servers where the IBSS application needs to be deployed from the dropdown and map both the modules to it.

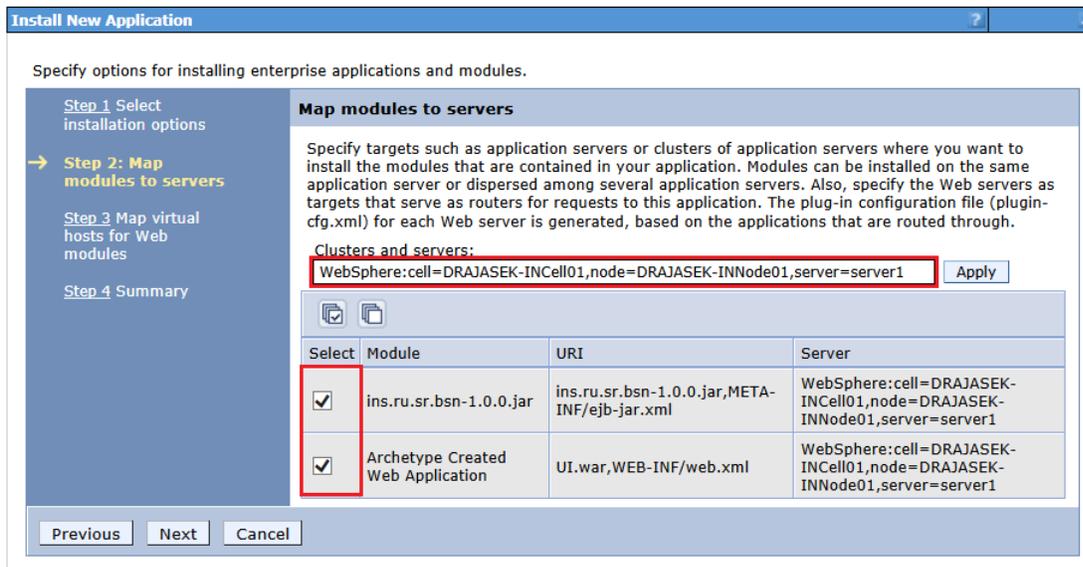


Figure 9 Selecting Map Modules to Server

10. Click Apply.
11. Click Next.
12. Skip to Step 4 and click Finish.
13. Save to Master Configuration.
14. Now that the application is deployed to the WebSphere server. Select the IBSS application and click Start.

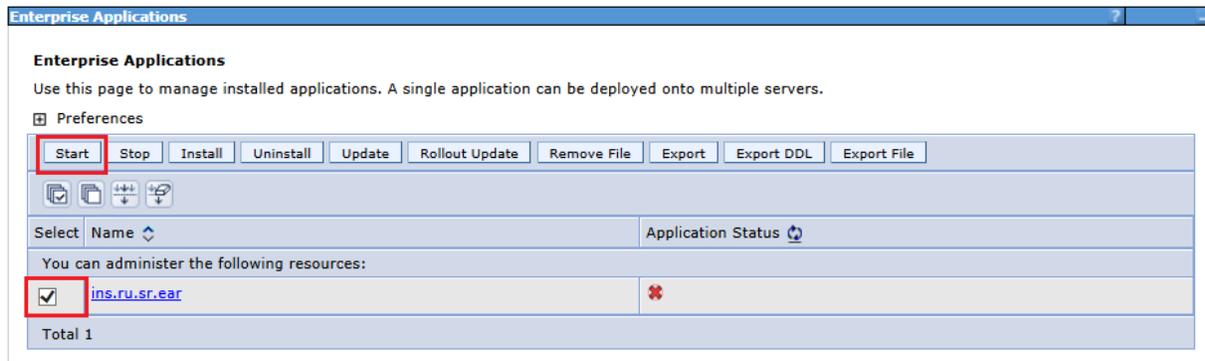


Figure 10 Starting the Application

15. Once the application is started successfully. Click SAVE.

## STEP 4: TEST CONNECTION

Test the application on URL: <http://<ServerName>:9080/IBSS>.

*Where: ServerName is the name of the server where WebSphere resides.*

The port can be changed, please verify the port number if the application fails to launch.

---

**NOTE:** *Port 9080 is the most commonly used port. The port number may have been changed when the instance was created.*

---

### Stopping and Starting WebSphere

If the application fails to launch and the port and server name are correct, you may need to stop and start WebSphere.

# INSTALLATION PROCEDURES – UTILIZING A SQL SERVER DATABASE

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

1. Creation of the IBSR databases.
2. Create a WebSphere entry in IBSS.
3. Create a WebSphere entry in IBFA.

For the Insbridge 04.07.01 release

- The IBSR database has been tested and supports MS SQL Server 2008 R2 on MS Windows 2008 64-bit.

## STEP 1: 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\_v04.05.01.sql
    - Update: usp\_IBSR\_v04.06.00.01.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\Inbridge\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.*

6. Go to **Databases**.

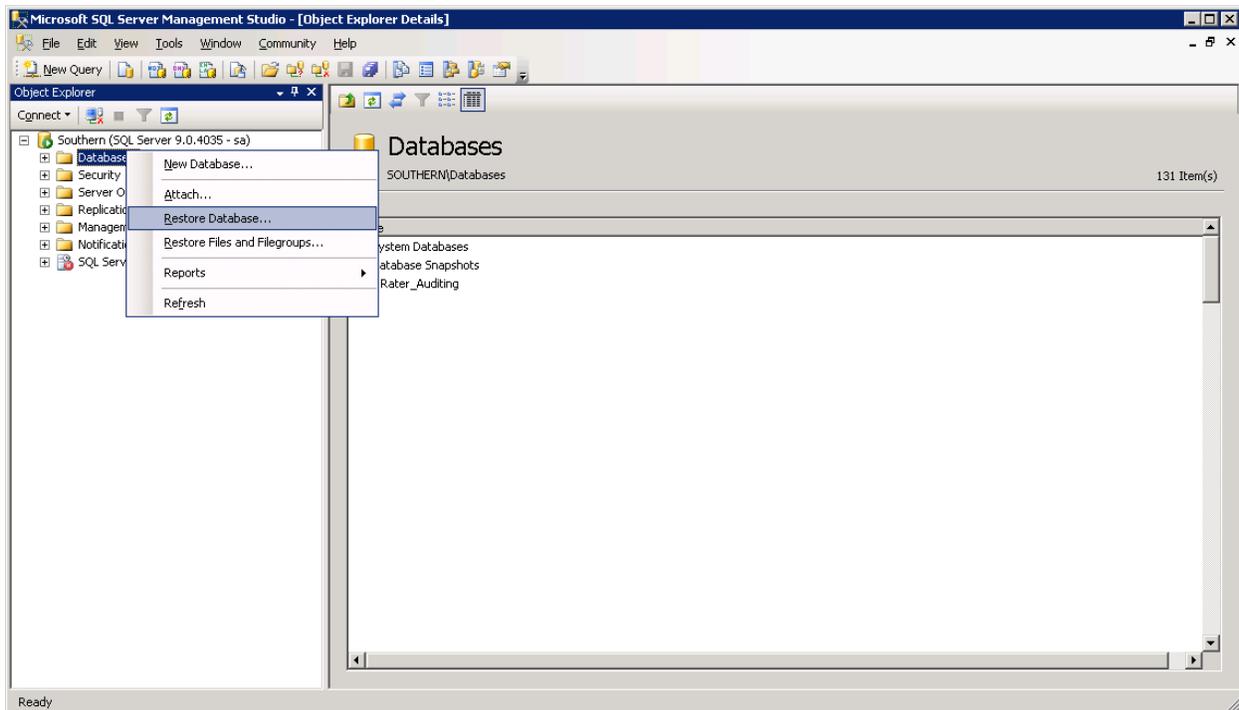


Figure 11 Right Click to Restore Database

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

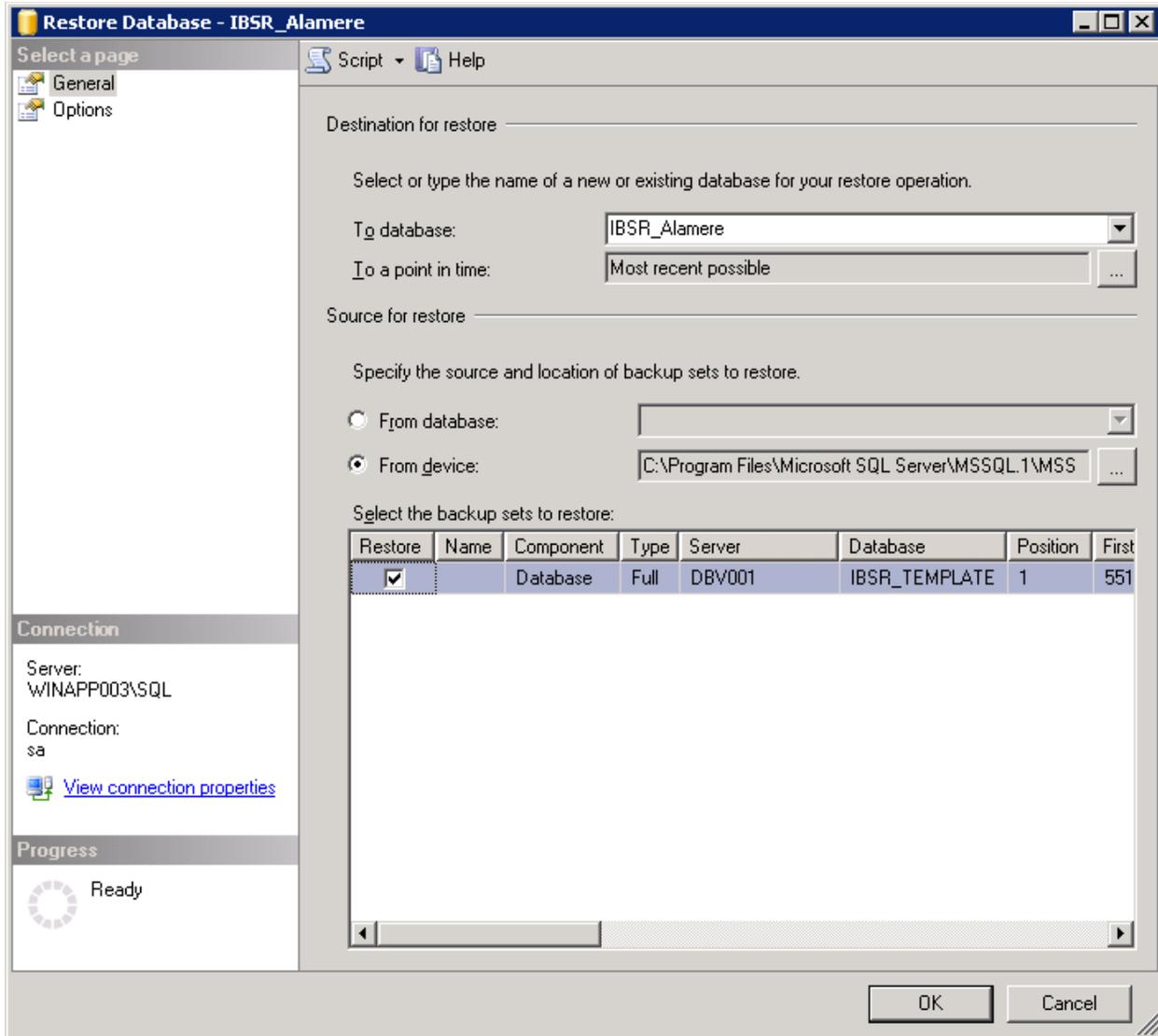


Figure 12 Restoring a Database

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 2: SETTING UP A WEBSHERE ENVIRONMENT IN IBSS

There are three steps that will need to be done in IBSS:

- **Step 1: Creating a New Subscriber**
- **Step 2: Creating a SoftRater Environment**
- **Step 3: Adding a Node**

Open an Internet Explorer web browser and browse to the following location, replacing ServerName with the actual server name where WebSphere resides:

<http://<ServerName or IP Address>:9080/IBSS>

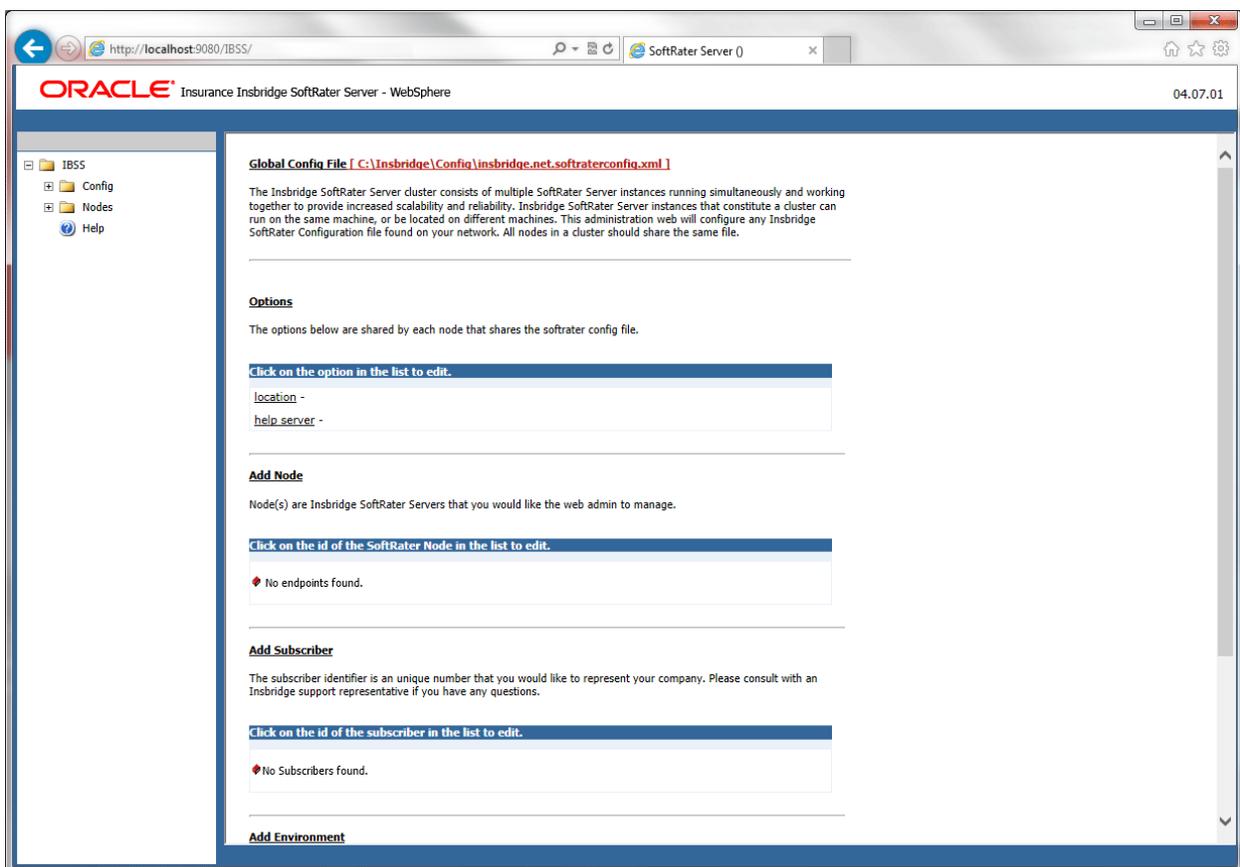


Figure 13 IBSS WebSphere Main Page

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

## Step 1: Creating a 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 and Name must match across all environments. If you have created a subscriber in IBFA, use the same ID and Name here. If you have not created a subscriber, you can create them here and then use the same information in other environments. The ID and Name are fixed after the first time you save. These entries cannot be edited.

1. Click on **Add Subscriber**. A separate screen is displayed.

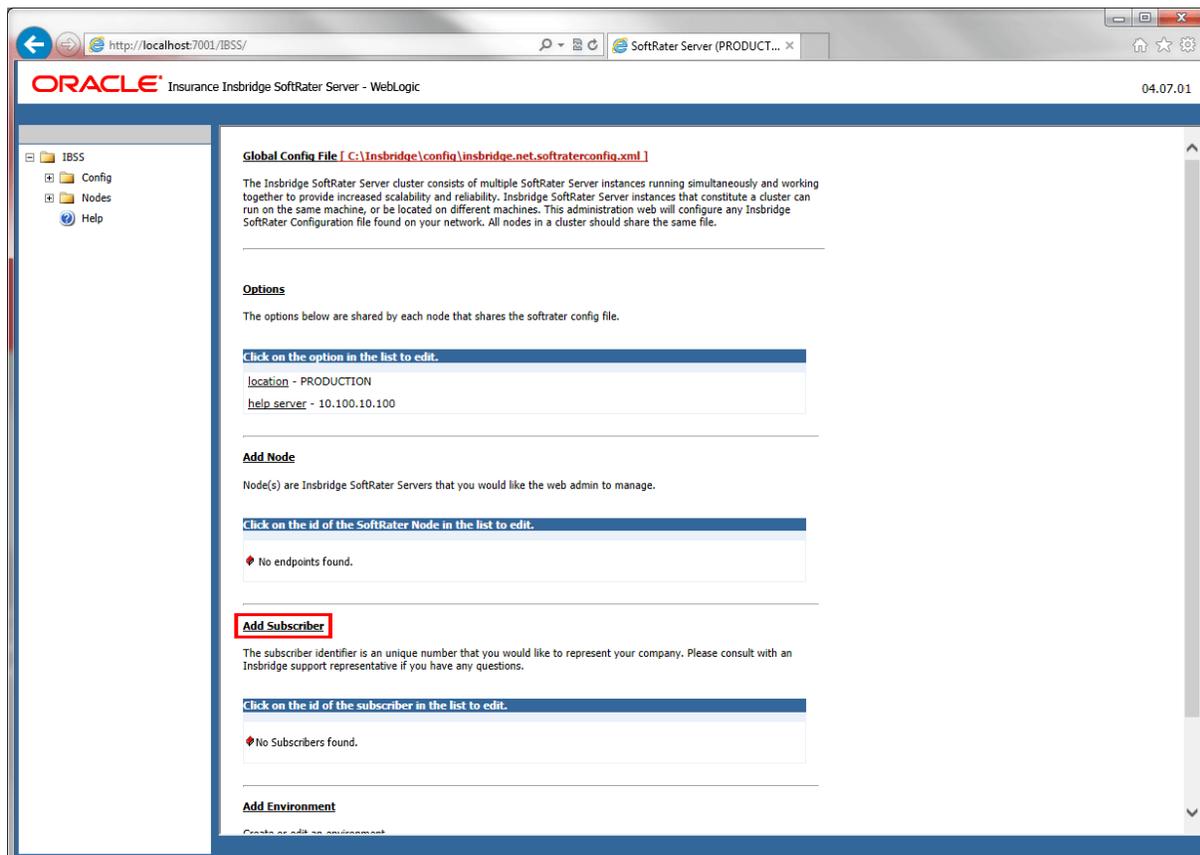


Figure 14 Adding a Subscriber

2. Enter the **ID**, and **Name** for your subscriber.

The Subscriber ID can be a 1-5 digit number and must be 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/>.



Figure 15 Enter ID

3. When you finish entering the information, click **Save**. The new subscriber will now be displayed in the list of subscribers.

---

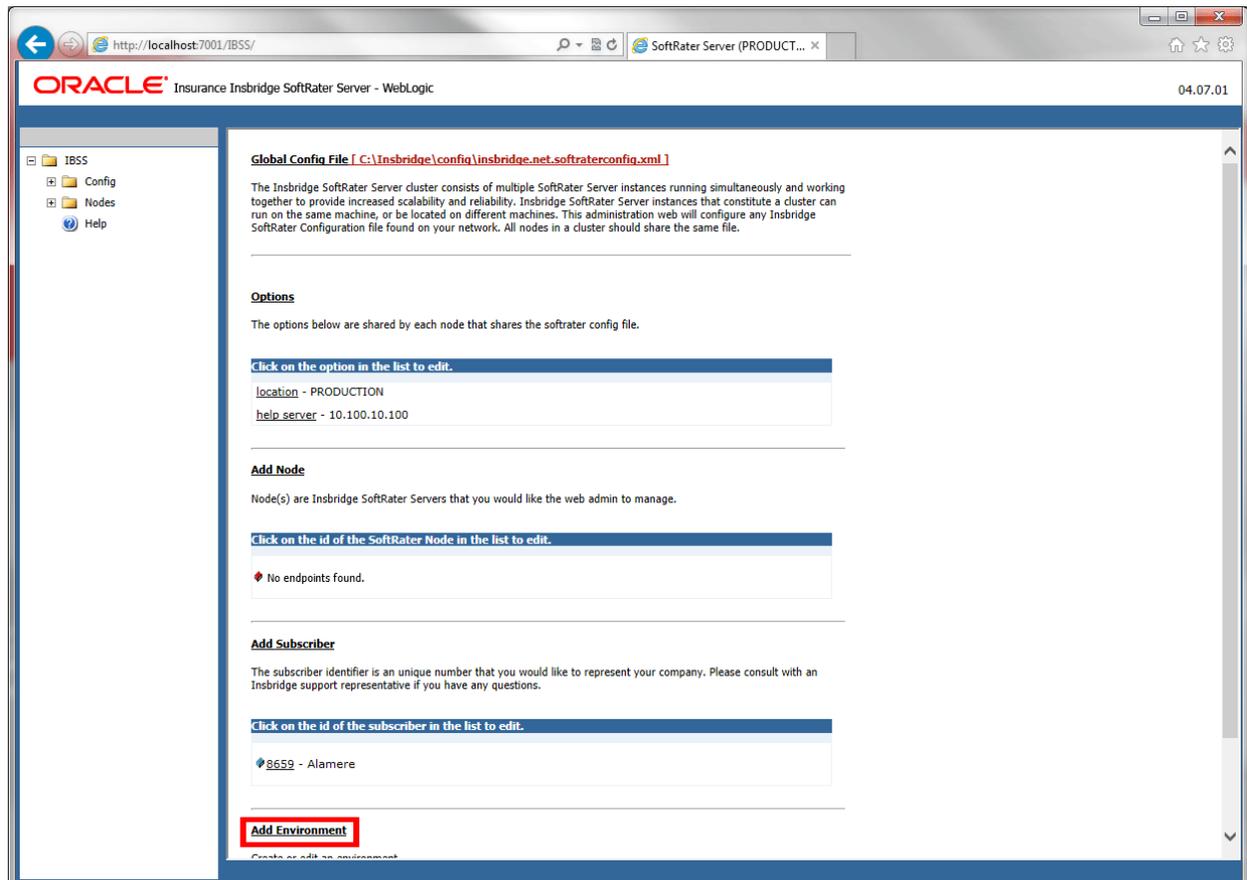
**NOTE:** Make note of the subscriber ID number. You may need to enter this on another IBFA or IBSS environment.

---

## Step 2: Creating a SoftRater Environment:

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

1. Select **Add Environment** from the IBSS Main page. You will be placed on the environment window.



2. A separate screen is displayed. Enter the following information:

### For DSN Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the IBRU system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the IBRU system.

**Database Server:** The name or IP address of the server where packages are loaded.

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

**Default port numbers:**

- SQL Server – 1433
- Oracle – 1521
- DB2 – 50000

**Query Block:** 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.

For DB2, enter a query size that is relative to the SQL statement heap size. For example, if your SQL statement heap size is 2048, you may want to enter a query size of 5. The larger the heap size, the larger the query size can be.

You may also need to increase the application heap size.

Query block is not needed for SQL Server or Oracle databases.

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

**Schema Name:** The schema name for the database. Schema Name is not needed for SQL connections.

**Database User Id:** The username to access the database.

**Database Password:** The password for the username entered.

**Provider Type:** The type of the database

- ORACLE
- DB2
- DB2(AS400)
- MS SQL SERVER

**Database Type:** The type of database being accessed:

- **SoftRater – The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

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

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon. 

3. When you are finished entering information, click **Save**.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: PROD\_B

Environment Type: DSN

Database Server: localhost

Database Port: 1433

Query Block:

Database Name: IBSR\_Production\_B

Schema name:

Database User Id: sa

Database Password: .....

Provider Type: MS SQL Server

Database Type: SoftRater

Data Dir: C:\Inbridge\Production\_B

Default Environment: True

Buttons: Save, Delete, Test Connection!, Close

Figure 16 Environment Setup

- Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

## For JNDI Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the IBRU system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the IBRU system.

**Name:** The name of the data source.

**Context Factory:** A *URL context factory* is a special object factory that creates contexts for resolving URL strings.

**RMI:** The Java Remote Method Invocation used.

**URL Host:** The name or IP of the host server.

**URL Port:** The port number used by the host server.

**Provider Type:** The type of the database

- **ORACLE**
- **DB2**
- **DB2(AS400)**
- **MS SQL SERVER**

**Database Type:** The type of database being accessed:

- **SoftRater** – **The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

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

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon. 

5. When you are finished entering information, click **Save**.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: BATCH

Environment Type: JNDI

Name: jdbc/batchDB

Context Factory: weblogic.jndi.WLInitialContextFactory

RMI: t3

Url Host: localhost

Url Port: 7001

Provider Type: ORACLE

Database Type: SoftRater

Data Dir:

Default Environment: False

Save Delete Test Connection! Close

Figure 17 Creating a JNDI Environment

Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

### Step 3: Adding a Node:

Every IBSS instance requires a node. Nodes allow for the management of multiple environments from one location. Nodes contain cache and log information for each environment as well as a reset option.

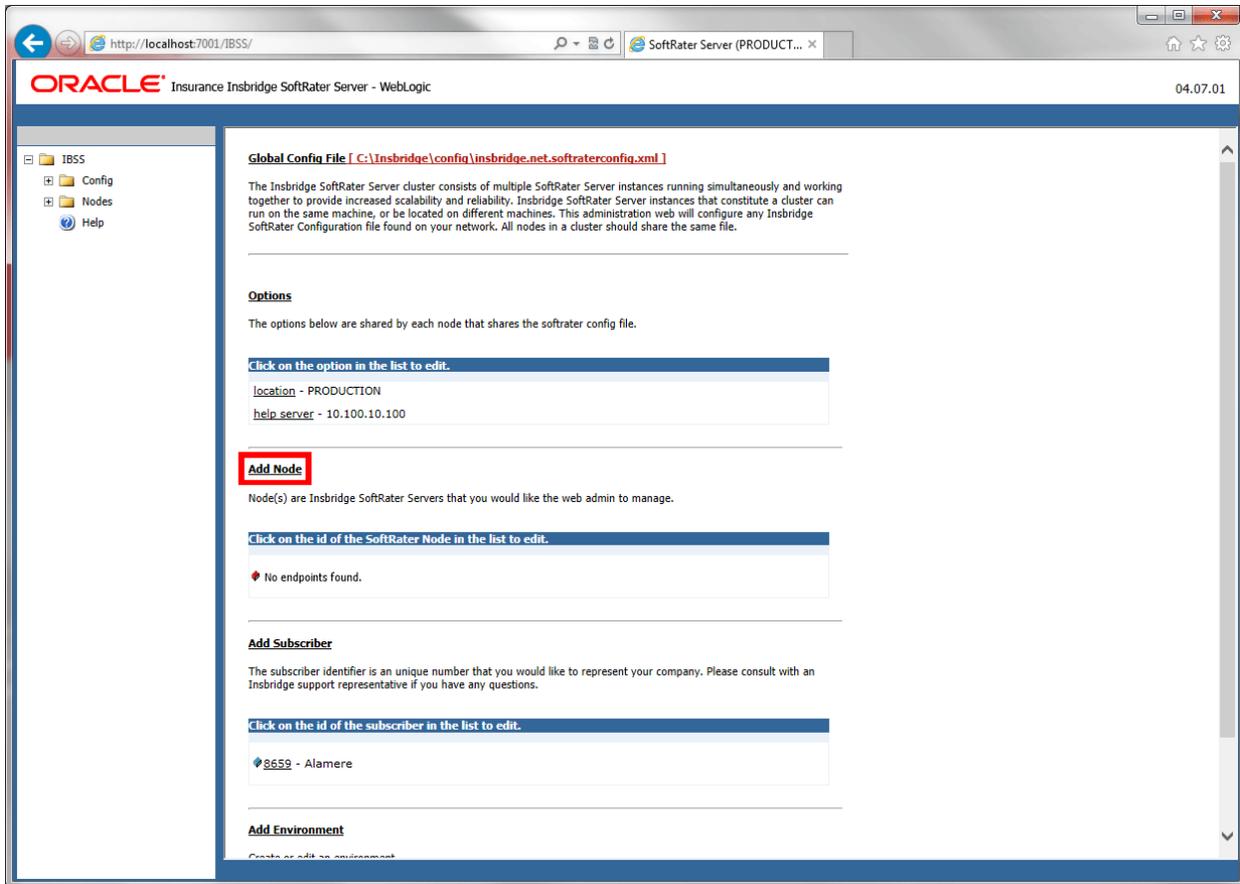


Figure 18 Adding a Controller Database Connection

To create a node, server information is needed:

- **Server OS**
- **Server Name or IP Address**
- **Port Used**

1. From the IBSS home page, click the **Add Node** link.
2. This opens the **Add Subscriber** window.



Figure 19 Adding a Node

3. Select the server operating system from the drop down. There are three choices, Linux, Mainframe and Windows.
4. Enter the server host name or IP address and port. The default ports:
  - **WebLogic:** Port 7001
  - **WebSphere:** Port 9080
  - **JBoss:** Port 8080

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

5. Enter a friendly name. This is the name displayed for the node.
6. Check if this is a secure environment. A secure environment connects using HTTPS.
7. It is recommended that the Ping Server option be used to test the connection. This is an optional step but can be helpful. If a connection cannot be made, the node cannot be saved.
8. Click **Add** to add the node. If a node cannot be added, an error message is displayed. Please correct the error and try again.

---

**NOTE:** *It is recommended that server names or IP addresses be used over localhost.*

---

## STEP 3: 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 WebSphere. 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 Production environment with a type of Production.
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.

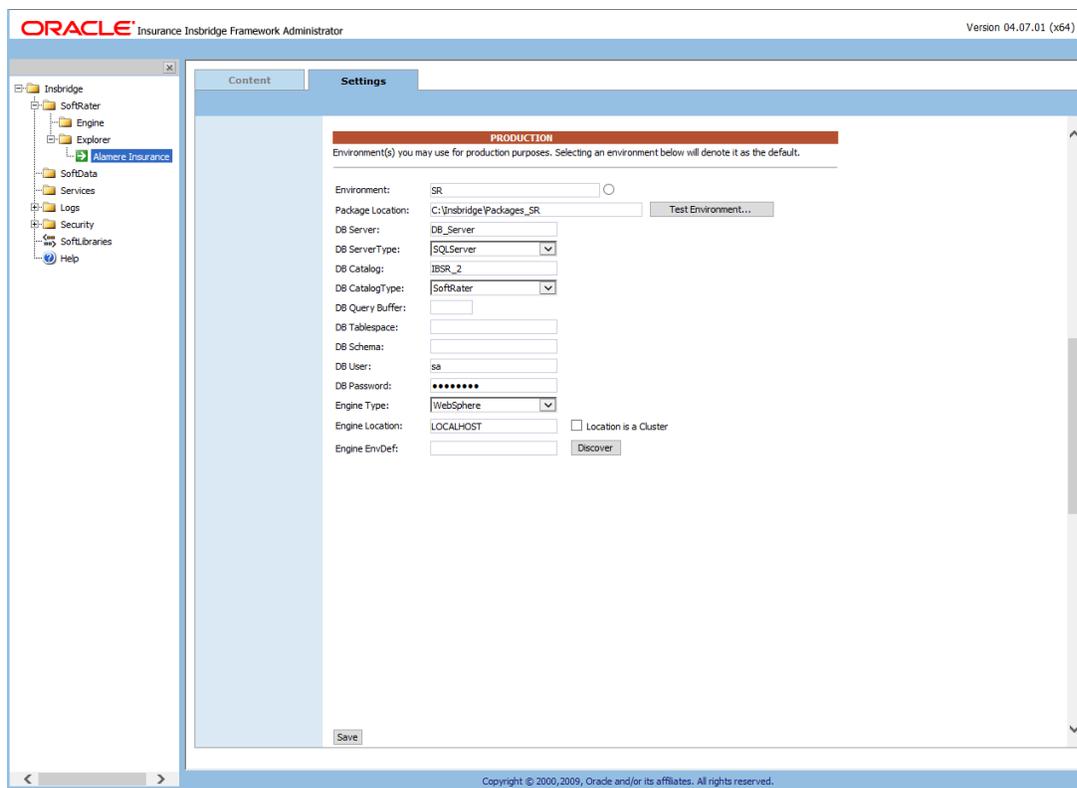


Figure 20 Editing Environment

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** is the Query Block entry from IBSS. An entry is required if you are using a DB2 database. For SQL or Oracle, no entry is needed.
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 WebSphere server may have "WBServerName:9080" 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 WebSphere Installation:

1. Create Oracle database.
2. Create a WebSphere entry in IBSS.
3. Run the Oracle Client on the machine where the IBRU system was installed.
4. Create a WebSphere entry in IBFA.

For the Insbridge 04.07.01 release:

- The IBRU application has tested and supports Oracle 11g Release 2 (11.2.0.1.0) utilizing Oracle Enterprise Linux 5.3.

### STEP 1: 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
- Location of the Insbridge files.

---

**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.*

---

## Creating an Oracle 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.

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

1. On your Oracle database, run all **DDLs**.

---

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

---

- 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/DDL folder. I.e. [INSTALL\_DIR]/Insbridge/SoftRater/DDL.
    - 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.
2. On your Oracle database, you will need to run a DT table script 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 Oracle DDL Directory

If a database table needs to be added in SoftRater, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDL folder. I.e. [INSTALL\_DIR]/Insbridge/SoftRater/DDL.

```
oracle.create.dt.template.sql.txt
oracle.create.packages.sql.txt
oracle.create.packages_lk.sql.txt
oracle.create.packages_rl.sql.txt
oracle.create.packages_si.sql.txt
oracle.create.packages_so.sql.txt
```

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.

## STEP 2: SETTING UP A WEBSHERE ENVIRONMENT IN IBSS

There are three steps that will need to be done in IBSS:

- **Step 1: Creating a New Subscriber**
- **Step 2: Creating a SoftRater Environment**
- **Step 3: Adding a Node**

Open an Internet Explorer web browser and browse to the following location, replacing ServerName with the actual server name where WebSphere resides:

<http://<ServerName or IP Address>:9080/IBSS>

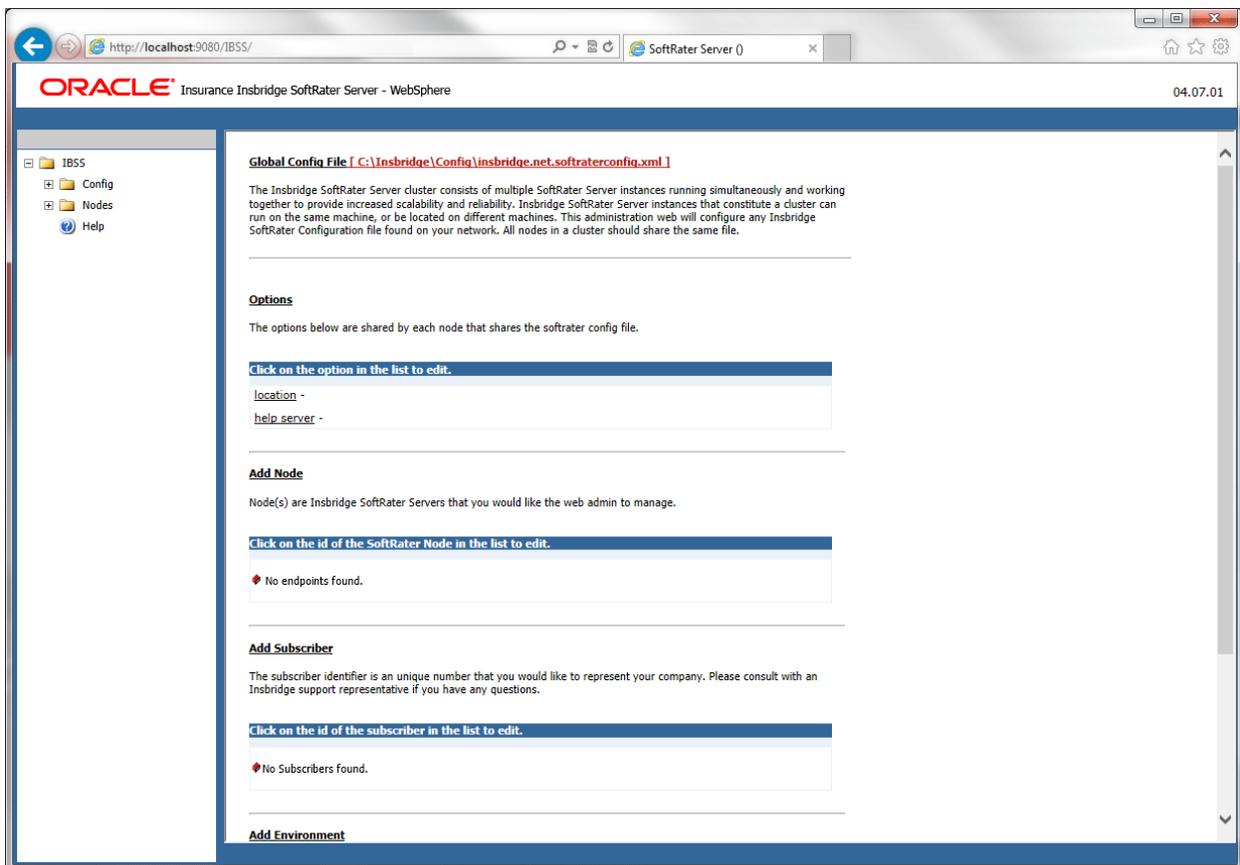


Figure 21 IBSS WebSphere Main Page

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

## Step 1: Creating a 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 and Name must match across all environments. If you have created a subscriber in IBFA, use the same ID and Name here. If you have not created a subscriber, you can create them here and then use the same information in other environments. The ID and Name are fixed after the first time you save. These entries cannot be edited.

4. Click on **Add Subscriber**. A separate screen is displayed.

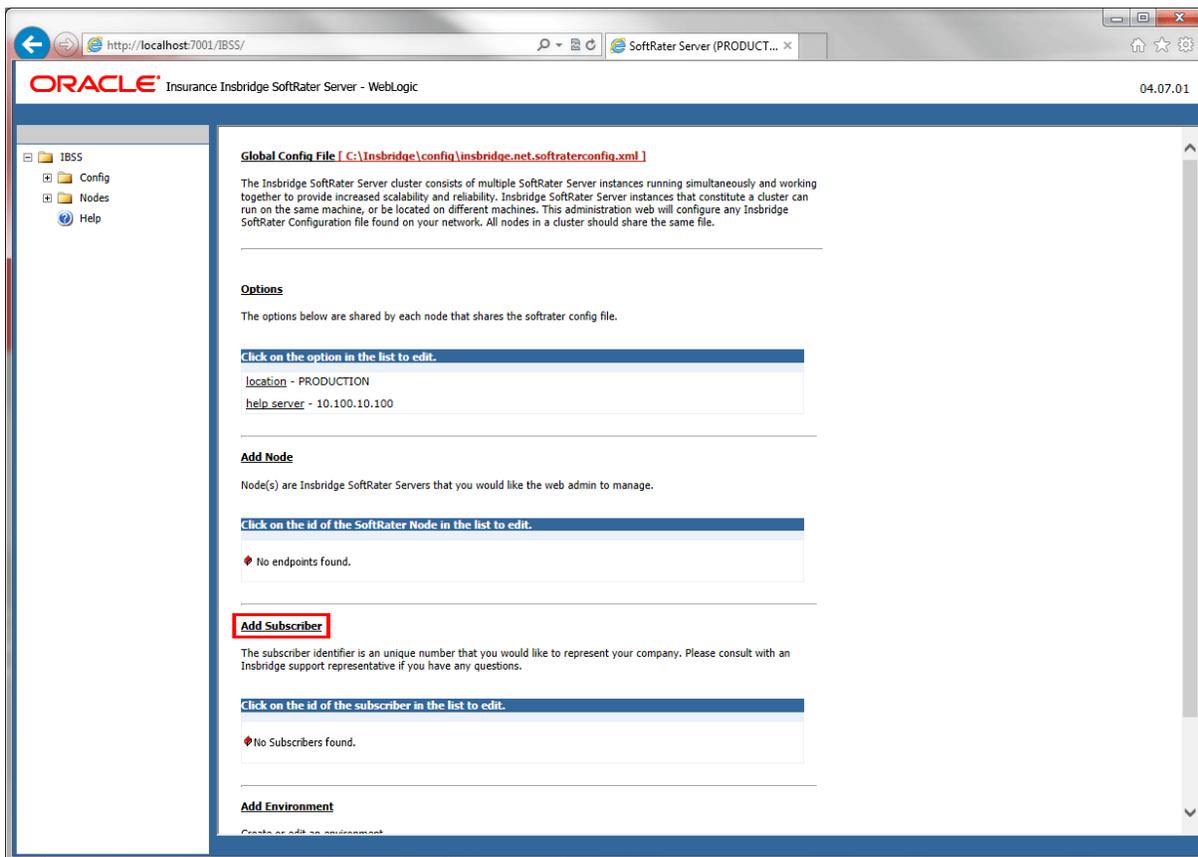


Figure 22 Adding a Subscriber

5. Enter the **ID**, and **Name** for your subscriber.

The Subscriber ID can be a 1-5 digit number and must be 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/>.

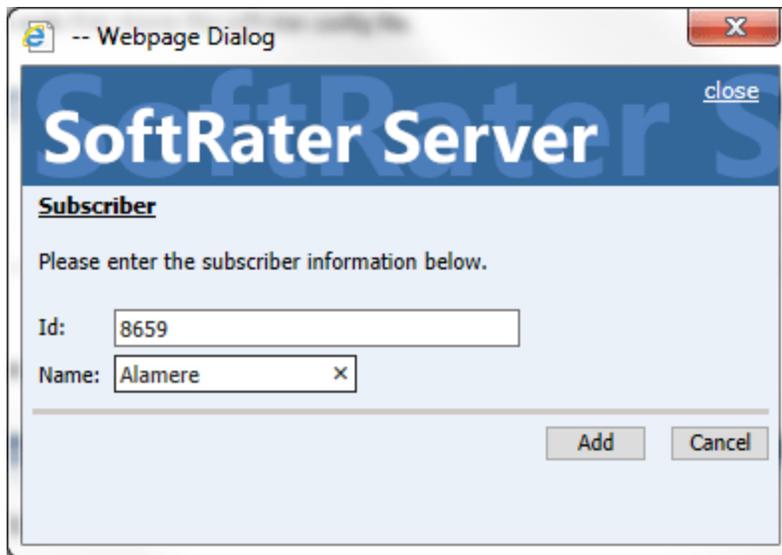


Figure 23 Enter ID

6. When you finish entering the information, click **Save**. The new subscriber will now be displayed in the list of subscribers.

---

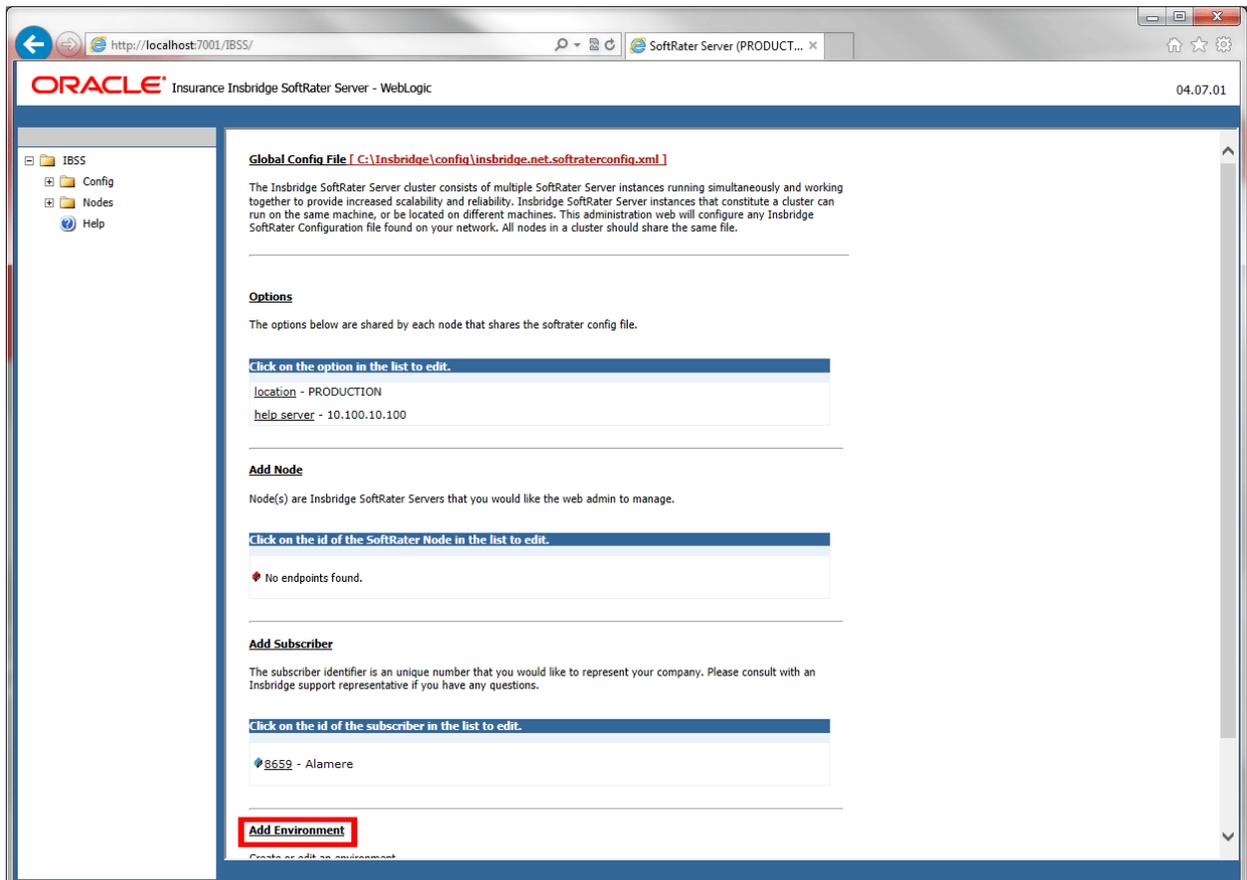
**NOTE:** Make note of the subscriber ID number. You may need to enter this on another IBFA or IBSS environment.

---

## Step 2: Creating a SoftRater Environment:

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

1. Select **Add Environment** from the IBSS Main page. You will be placed on the environment window.



2. A separate screen is displayed. Enter the following information:

### For DSN Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the IBRU system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the IBRU system.

**Database Server:** The name or IP address of the server where packages are loaded.

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

**Default port numbers:**

- SQL Server – 1433
- Oracle – 1521
- DB2 – 50000

**Query Block:** 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.

For DB2, enter a query size that is relative to the SQL statement heap size. For example, if your SQL statement heap size is 2048, you may want to enter a query size of 5. The larger the heap size, the larger the query size can be.

You may also need to increase the application heap size.

Query block is not needed for SQL Server or Oracle databases.

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

**Schema Name:** The schema name for the database. Schema Name is not needed for SQL connections.

**Database User Id:** The username to access the database.

**Database Password:** The password for the username entered.

**Provider Type:** The type of the database

- ORACLE
- DB2
- DB2(AS400)
- MS SQL SERVER

**Database Type:** The type of database being accessed:

- **SoftRater – The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

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

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon. 

3. When you are finished entering information, click **Save**.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: PROD\_B

Environment Type: DSN

Database Server: localhost

Database Port: 1433

Query Block:

Database Name: IBSR\_Production\_B

Schema name:

Database User Id: sa

Database Password: .....

Provider Type: MS SQL Server

Database Type: SoftRater

Data Dir: C:\Insbridge\Production\_B

Default Environment: True

Buttons: Save, Delete, Test Connection!, Close

Figure 24 Environment Setup

- Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

## For JNDI Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the IBRU system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the IBRU system.

**Name:** The name of the data source.

**Context Factory:** A *URL context factory* is a special object factory that creates contexts for resolving URL strings.

**RMI:** The Java Remote Method Invocation used.

**URL Host:** The name or IP of the host server.

**URL Port:** The port number used by the host server.

**Provider Type:** The type of the database

- **ORACLE**
- **DB2**
- **DB2(AS400)**
- **MS SQL SERVER**

**Database Type:** The type of database being accessed:

- **SoftRater** – **The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

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

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon. 

5. When you are finished entering information, click **Save**.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: BATCH

Environment Type: JNDI

Name: jdbc/batchDB

Context Factory: weblogic.jndi.WLInitialContextFactory

RMI: t3

Url Host: localhost

Url Port: 7001

Provider Type: ORACLE

Database Type: SoftRater

Data Dir:

Default Environment: False

Save Delete Test Connection! Close

Figure 25 Creating a JNDI Environment

Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

### Step 3: Adding a Node:

Every IBSS instance requires a node. Nodes allow for the management of multiple environments from one location. Nodes contain cache and log information for each environment as well as a reset option.

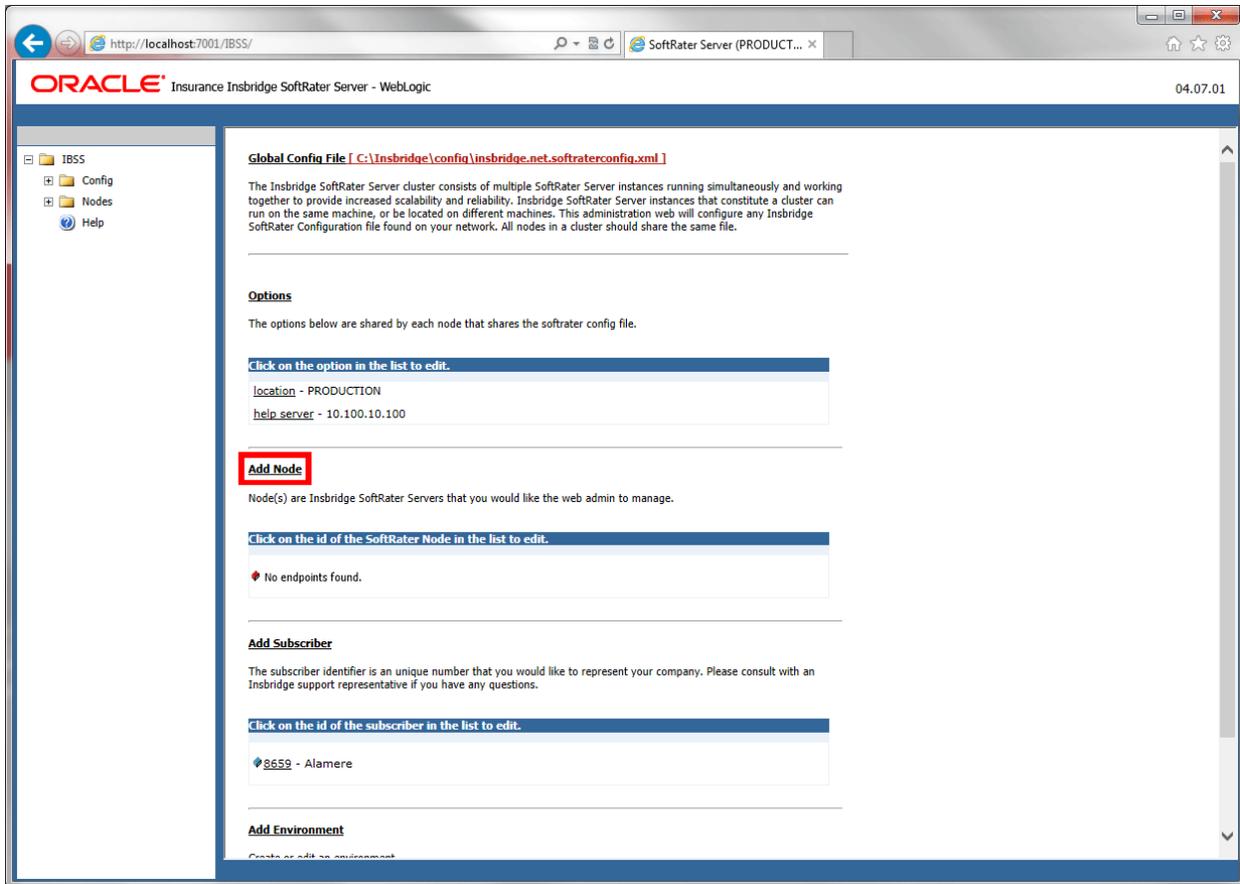


Figure 26 Adding a Controller Database Connection

To create a node, server information is needed:

- **Server OS**
- **Server Name or IP Address**
- **Port Used**

1. From the IBSS home page, click the **Add Node** link.
2. This opens the **Add Subscriber** window.



Figure 27 Adding a Node

3. Select the server operating system from the drop down. There are three choices, Linux, Mainframe and Windows.
4. Enter the server host name or IP address and port. The default ports:
  - **WebLogic:** Port 7001
  - **WebSphere:** Port 9080
  - **JBoss:** Port 8080

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

5. Enter a friendly name. This is the name displayed for the node.
6. Check if this is a secure environment. A secure environment connects using HTTPS.
7. It is recommended that the Ping Server option be used to test the connection. This is an optional step but can be helpful. If a connection cannot be made, the node cannot be saved.
8. Click **Add** to add the node. If a node cannot be added, an error message is displayed. Please correct the error and try again.

---

**NOTE:** *It is recommended that server names or IP addresses be used over localhost.*

---

## STEP 3: 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.

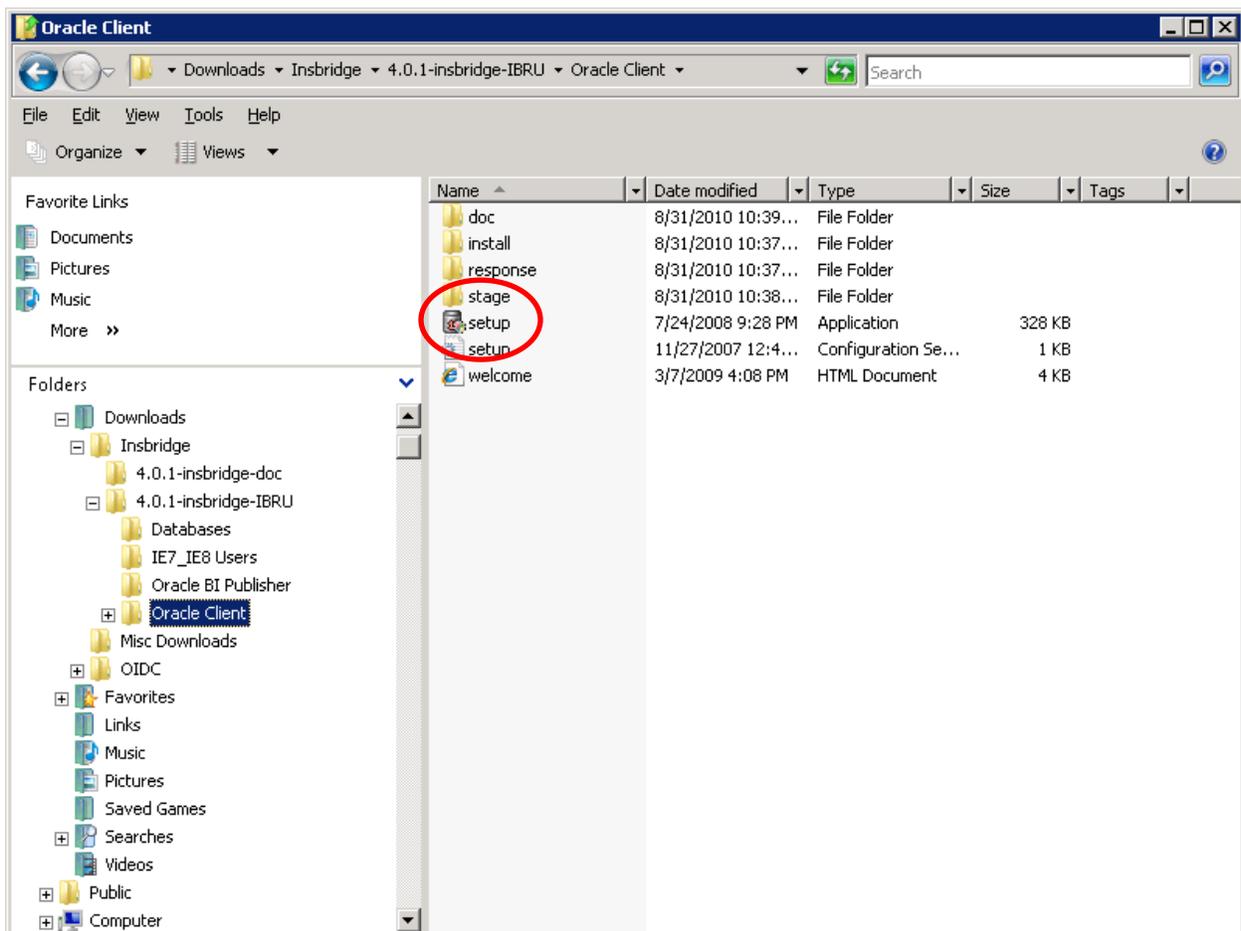


Figure 28 Locating the Oracle Client for 64-bit Installs

1. In the 04.07.01-insbridge-IBRU folder, locate the Oracle Client folder.
2. Select the setup application. The Oracle client installation will begin.

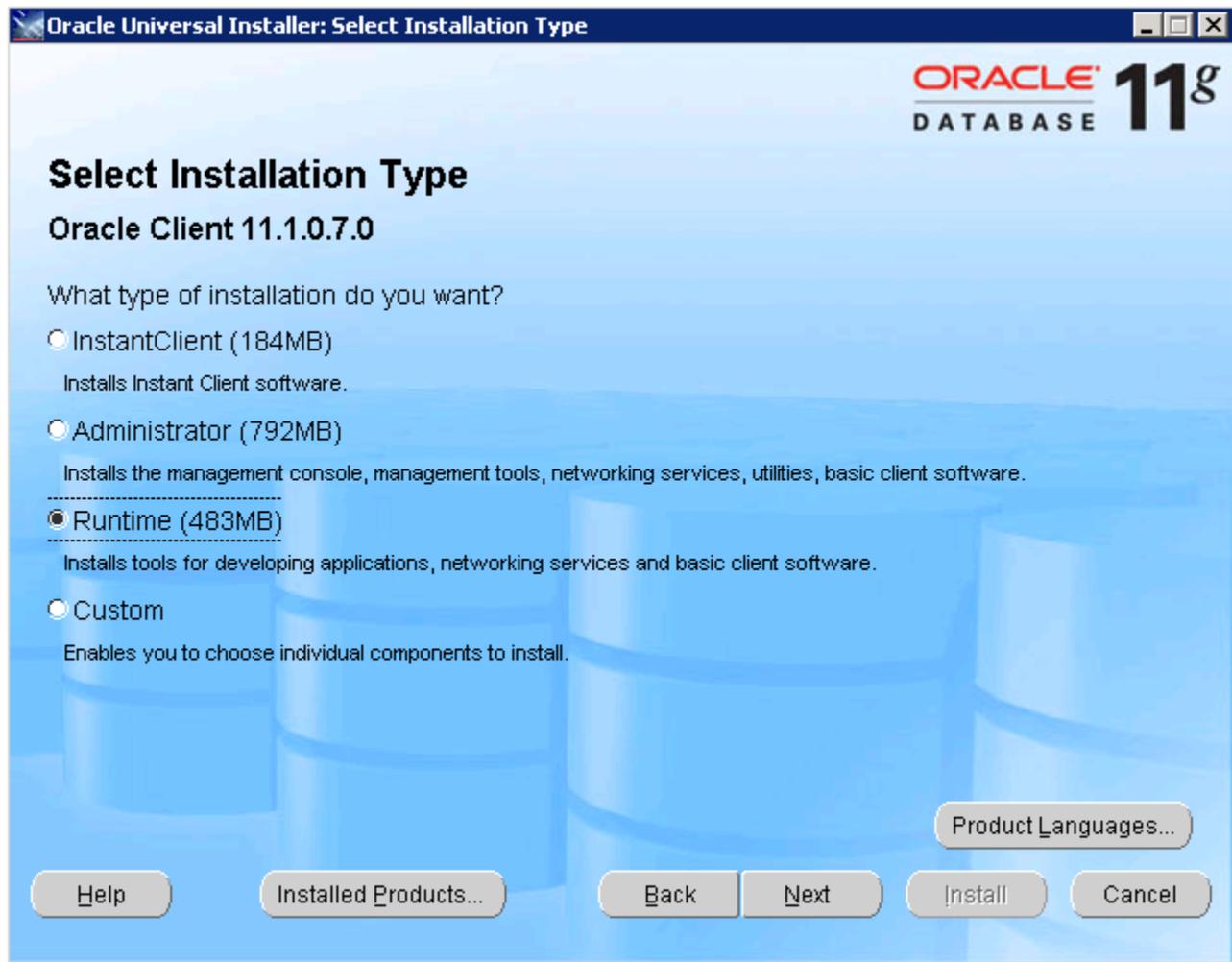


Figure 29 Running the Oracle Client

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**.

## STEP 4: 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 WebSphere. 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 Production environment with a type of Production.
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.

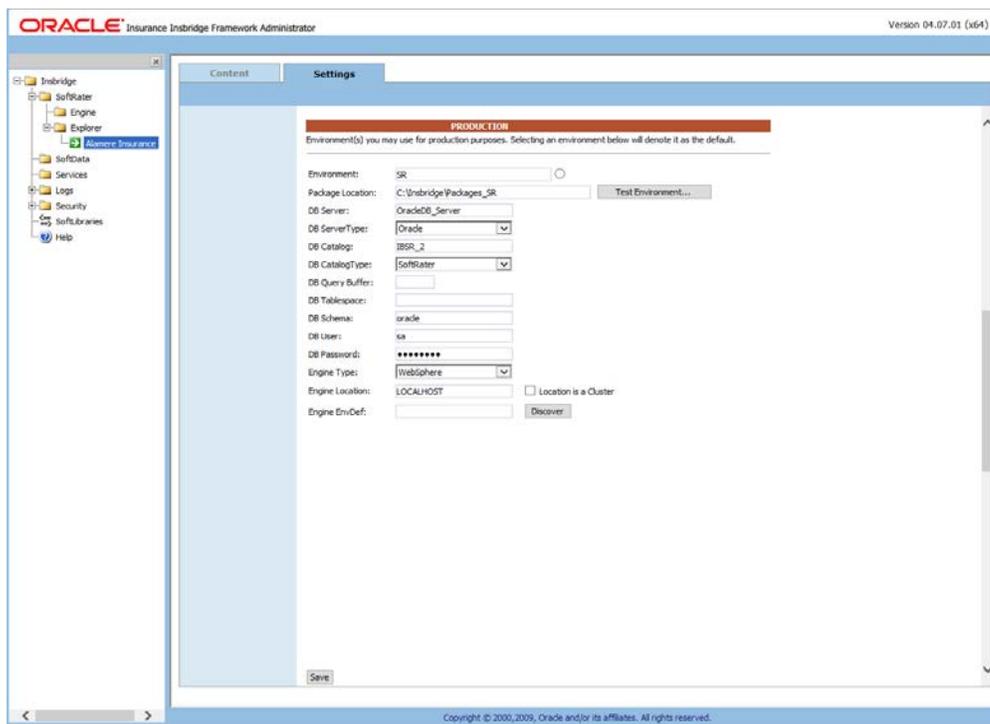


Figure 30 Editing Environment

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** is the name of the schema that defines the structure of the database. This information may be obtained from the DBA.
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 WebSphere server may have "WBServerName:9080" 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 IBM DB2 DATABASE

The following is a check list of the installation steps needed to perform a NEW SoftRater for WebSphere Installation utilizing an IBM DB2 (DB2) database:

1. Create a DB2 database.
2. Create a shared library in WebSphere.
3. Create a WebSphere entry in IBSS.
4. Run the DB2 Client on the machine where the IBRU system was installed.
5. Create a WebSphere entry in IBFA

## Required DB2.Jar File

The required DB2 .jar file is not a part of the IBRU application. However, in order to establish a DB2 database connection, the jar file **db2jcc-9.0.0.jar** needs to be added to the IBSS.EAR file before deployment.

The db2jcc.jar can be found in  
<WAS\_HOME>/AppServer/deploytool/itp/plugins/com.ibm.datatools.db2\_2.0.0.v200808071952/driver/db2jcc.jar

If the db2 jar cannot be found in the above location, download this jar from the location  
<http://www.java2s.com/Code/Jar/d/Downloaddb2jccjar.htm>

Save the db2jcc.jar file to a location on your machine <db2\_location>.

## Required DB2 Client

To obtain the DB2 client, please visit the IBM website and download the Client for IBM Data Server Runtime Client, Version 9.5 with fix pack 8.

You also can perform a search for “IBM Data Server Runtime Client, Version 9.5 with fix pack 8”

---

**NOTE:** You may need to create a free user account to download materials.

---

---

**NOTE:** Release 04.07.01 was tested on IBM DB2 v9.5.

---

## STEP 1: CREATING A DB2 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.

---

**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.*

---

Before proceeding, please have ready:

- The LOBs that your company uses. You will need the ID number for each LOB.
- Your subscriber number.
- Location of the Insbridge files.

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.

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

1. On your DB2 database, run all **DDLs**.

---

**NOTE:** *If you do not have database permissions, you will not be able to perform the following database procedures. The Insbridge user must be granted "Connect to database", "Create Tables", and "Create packages" authorities.*

---

- 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/DDL folder. I.e. [INSTALL\_DIR]/Insbridge/SoftRater/DDL.
    - 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 Connect to database, Create Tables and Create packages authorities.
2. On your DB database, you will need to run a DT table script 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 DB2 DDL Directory

If a database table needs to be added in SoftRater, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDL folder. I.e. [INSTALL\_DIR]/Insbridge/SoftRater/DDL.

```
db2.create.dt.template.sql.txt
db2.create.packages.sql.txt
db2.create.packages_lk.sql.txt
db2.create.packages_rl.sql.txt
db2.create.packages_si.sql.txt
db2.create.packages_so.sql.txt
```

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 2: ASSIGNING THE SHARED INSBRIDGE LIBRARIES

1. Open the WebSphere Administrative console, and Navigate to **Shared Library Environment > Shared libraries**.



Figure 31 Selecting Shared Libraries

2. In the Shared Libraries screen, select the Scope of the Shared library to be created and click **New**.

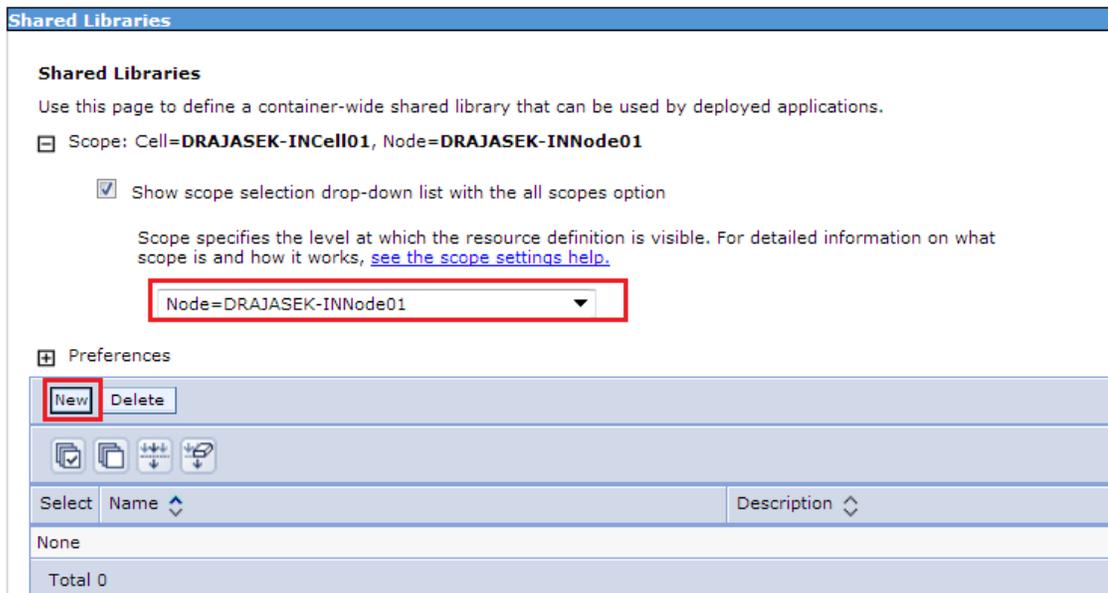


Figure 32 Creating a New Shared Library

3. In the Configuration Screen, enter the following details:

Name            - <Any appropriate name>  
 Classpath      - <db2\_location>

*This is the location of the db2jcc.jar along with the jar name. Please see Figure 25 Entering Shared Library Information.*

**Shared Libraries > New**

Use this page to define a container-wide shared library that can be used by deployed applications.

Configuration

**General Properties**

\* Scope  
cells:DRAJASEK-INCell01:nodes:DRAJASEK-INNode01

\* Name  
db2\_jar

Description

\* Classpath  
C:\Installed\_Softwares\IBM\WebSphere\AppServer\deploytoo  
\ltp\plugins\com.ibm.datatools.db2\_2.0.0.v200808071952  
\driver\db2jcc.jar

Native Library Path

**Class Loading**

Use an isolated class loader for this shared library

Apply OK Reset Cancel

Figure 33 Entering Shared Library Information

4. Click **Apply**.
5. **Save** the configuration.
6. Navigate to **WebSphere Enterprise Applications Applications > Application Types > WebSphere enterprise applications**.



Figure 34 Selecting WebSphere Enterprise Applications

7. In the Enterprise Applications screen, click on the application name **ins.ru.sr.ear**.

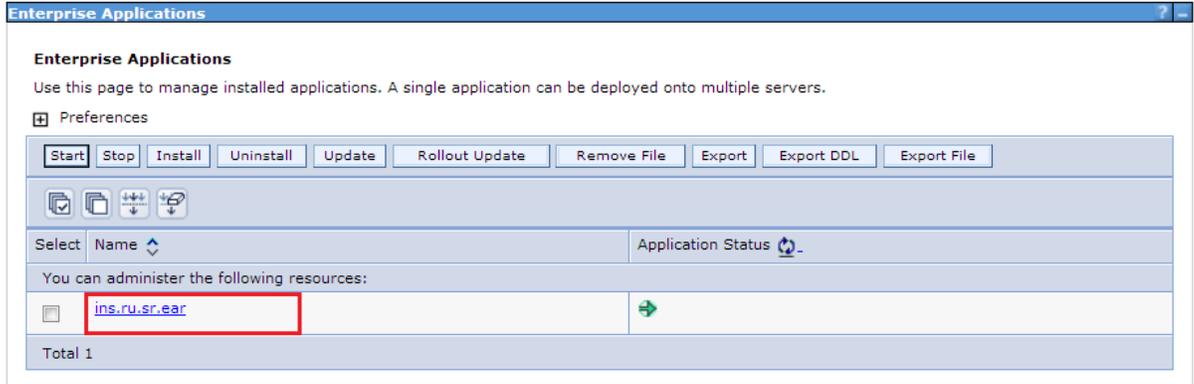


Figure 35 Selecting the Insbridge Application

- In the application Configuration screen, click on **Shared library references**

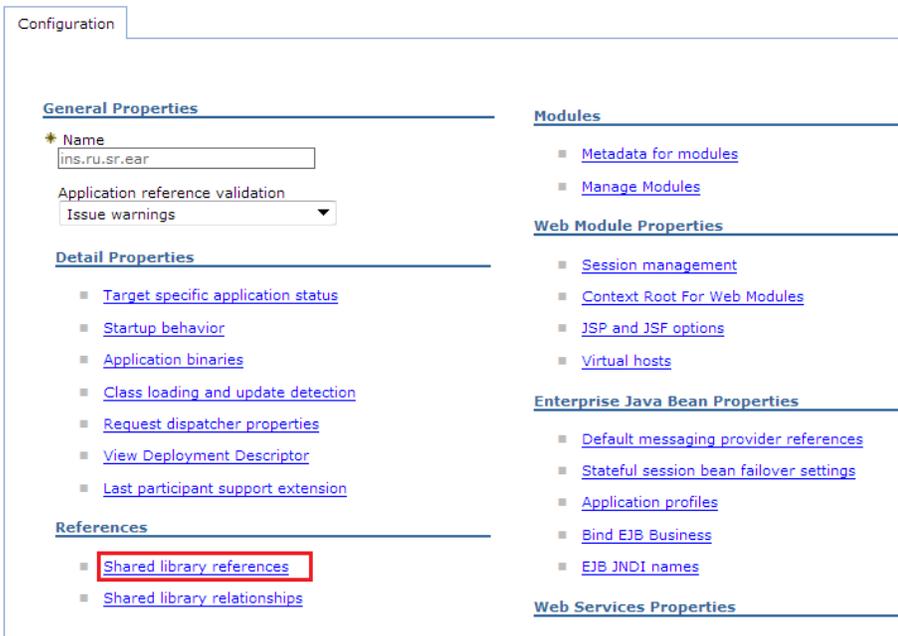


Figure 36 Shared Library Reference

- In the Shared library references screen, select the application check box and click on **Reference shared libraries**

[Enterprise Applications](#) > [ins.ru.sr.ear](#) > [Shared library references](#)

Shared Library Mapping for Modules

Specify shared libraries that the application or individual modules reference. These libraries must be defined in the configuration at the appropriate scope.

Reference shared libraries			
Select	Application	URI	Shared Libraries
<input checked="" type="checkbox"/>	ins.ru.sr.ear	META-INF/application.xml	
Select	Module	URI	Shared Libraries
<input type="checkbox"/>	Archetype Created Web Application	UI.war,WEB-INF/web.xml	

OK Cancel

10. Select the DB2 Shared Library name in the Available list and click on the arrow -> to add it to the Selected list.



Figure 37 Adding the DB2.jar

11. Make sure the DB2 library name appears in the Selected list. Click **OK**. This will return you to the Shared Library Reference screen.



12. The DB2.jar must be shared with the Module also. Select the Module from the list and follow the same process as above.

[Enterprise Applications](#) > [ins.ru.sr.ear](#) > **Shared library references**

Shared Library Mapping for Modules

Specify shared libraries that the application or individual modules reference. These libraries must be defined in the configuration at the appropriate scope.

Reference shared libraries			
Select	Application	URI	Shared Libraries
<input type="checkbox"/>	ins.ru.sr.ear	META-INF/application.xml	db2.jar
Select	Module	URI	Shared Libraries
<input checked="" type="checkbox"/>	Archetype Created Web Application	UI.war,WEB-INF/web.xml	

OK Cancel

Figure 38 Adding the Shared Library to the Module

13. The DB2 library name must appear for both the Application and Module.

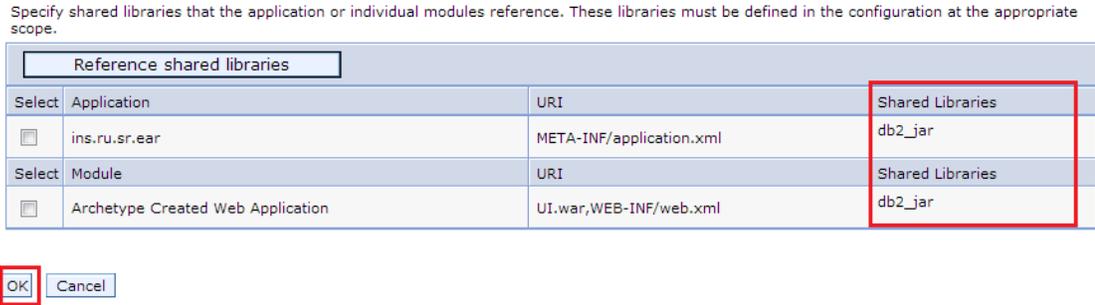


Figure 39 DB2.jar Shared with Application and Module

14. Click **OK**.
15. **Save** the configuration.
16. Now Navigate to WebSphere Application Servers, and restart the server for the changes to take effect.



17. Select all the servers where the application is deployed and click **Restart**.

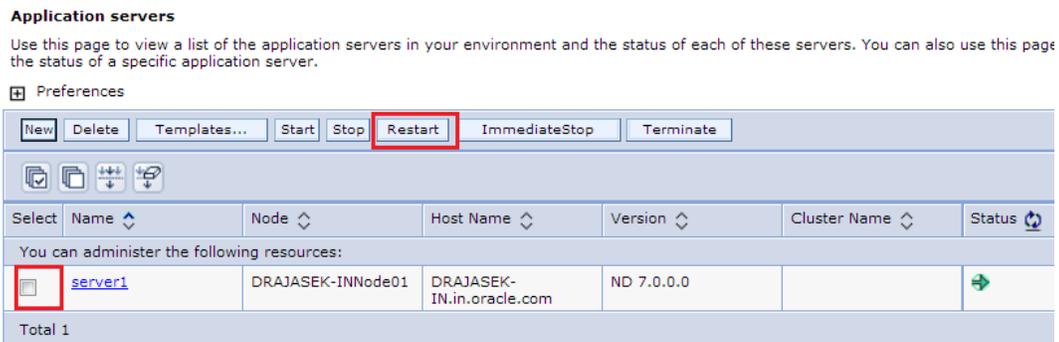


Figure 40 Restarting the Server

18. Once the server is restarted, a success message will be displayed.

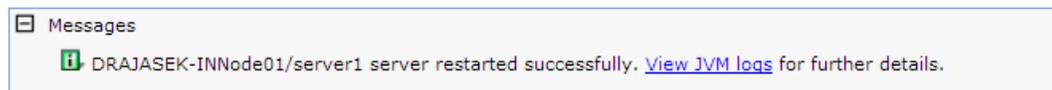


Figure 41 Successful Restart

## STEP 3: SETTING UP A WEBSHERE ENVIRONMENT IN IBSS

There are three steps that will need to be done in IBSS:

- **Step 1: Creating a New Subscriber**
- **Step 2: Creating a SoftRater Environment**
- **Step 3: Adding a Node**

Open an Internet Explorer web browser and browse to the following location, replacing ServerName with the actual server name where WebSphere resides:

<http://<ServerName or IP Address>:9080/IBSS>

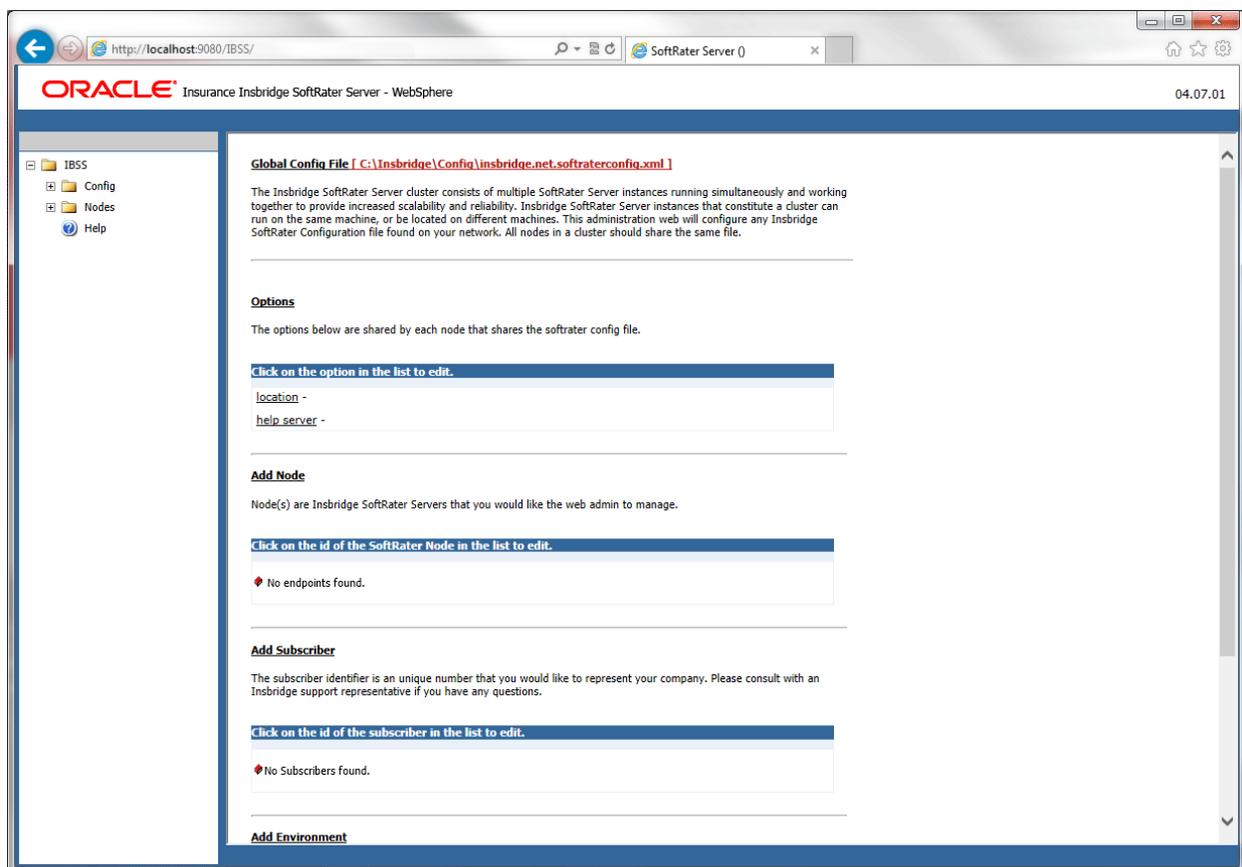


Figure 42 IBSS WebSphere Main Page

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

## Step 1: Creating a 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 and Name must match across all environments. If you have created a subscriber in IBFA, use the same ID and Name here. If you have not created a subscriber, you can create them here and then use the same information in other environments. The ID and Name are fixed after the first time you save. These entries cannot be edited.

1. Click on **Add Subscriber**. A separate screen is displayed.

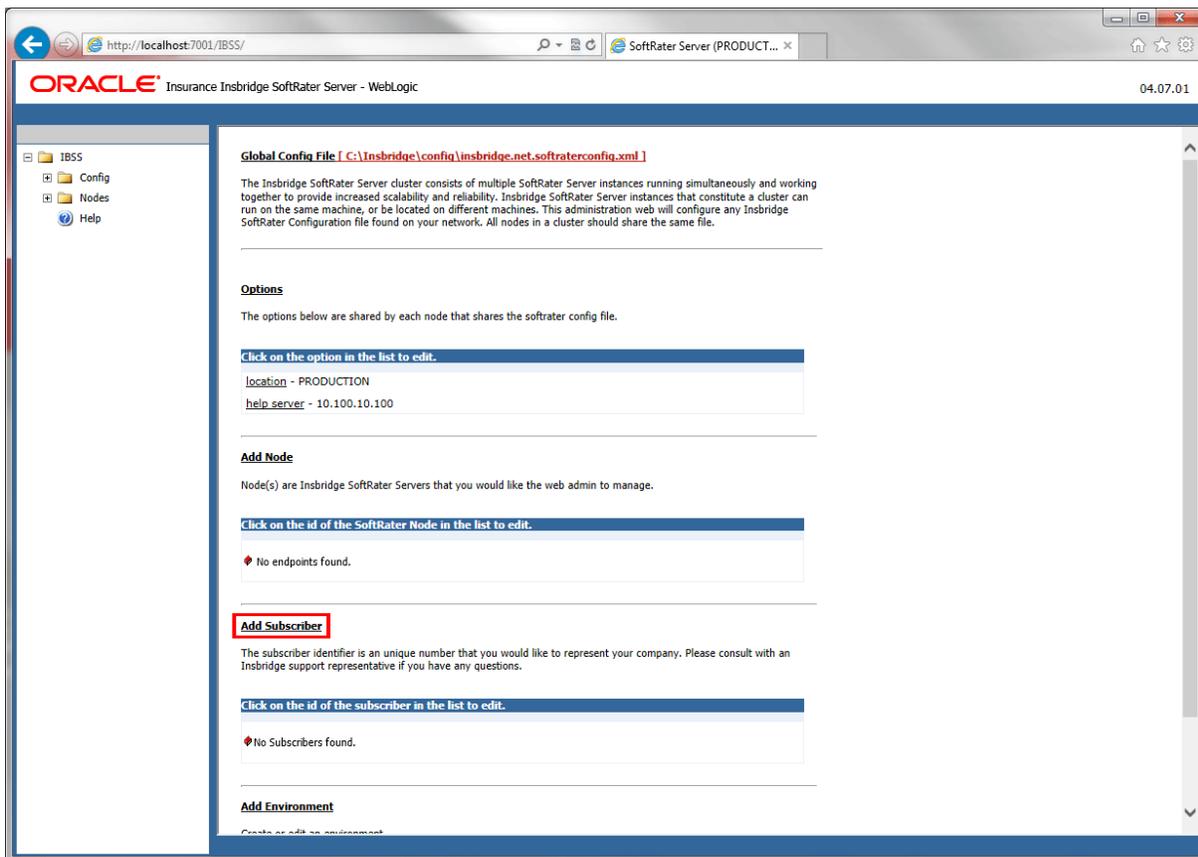


Figure 43 Adding a Subscriber

2. Enter the **ID**, and **Name** for your subscriber.

The Subscriber ID can be a 1-5 digit number and must be 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/>.

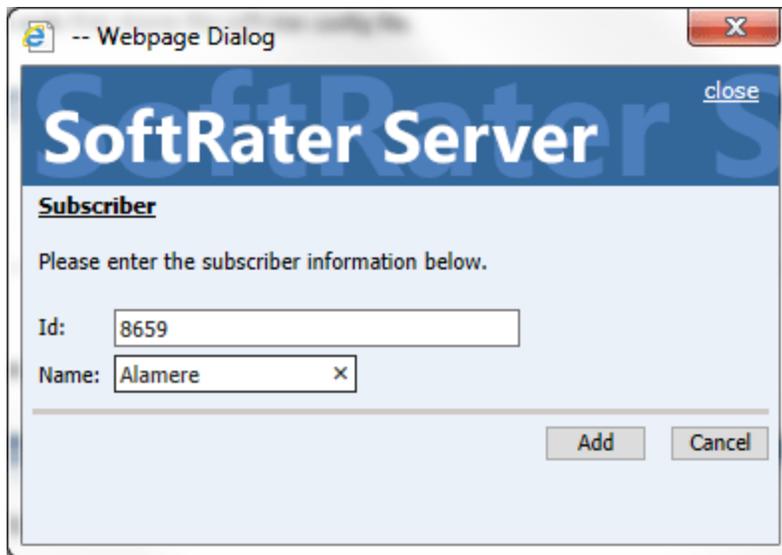


Figure 44 Enter ID

3. When you finish entering the information, click **Save**. The new subscriber will now be displayed in the list of subscribers.

---

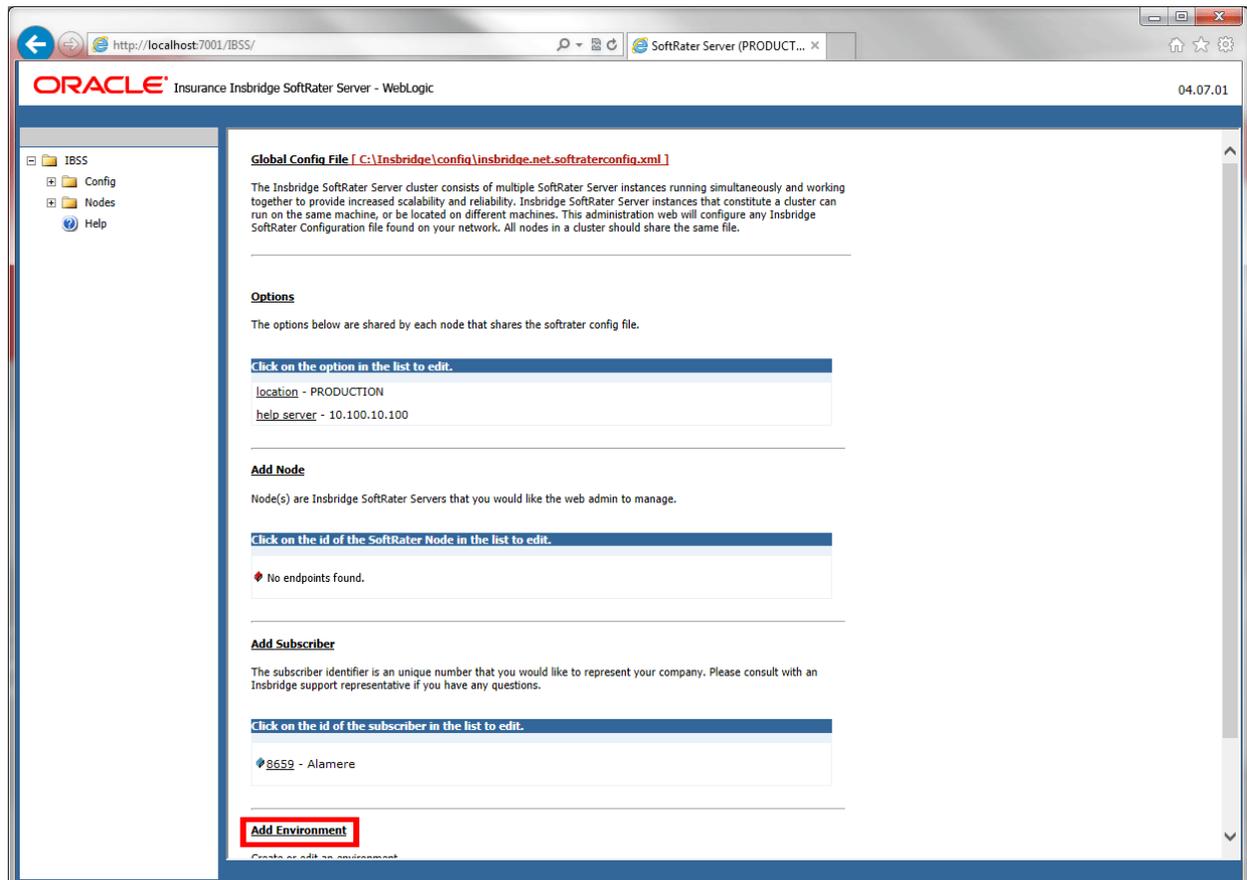
**NOTE:** Make note of the subscriber ID number. You may need to enter this on another IBFA or IBSS environment.

---

## Step 2: Creating a SoftRater Environment:

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

1. Select **Add Environment** from the IBSS Main page. You will be placed on the environment window.



2. A separate screen is displayed. Enter the following information:

### For DSN Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the IBRU system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the IBRU system.

**Database Server:** The name or IP address of the server where packages are loaded.

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

**Default port numbers:**

- SQL Server – 1433
- Oracle – 1521
- DB2 – 50000

**Query Block:** 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.

For DB2, enter a query size that is relative to the SQL statement heap size. For example, if your SQL statement heap size is 2048, you may want to enter a query size of 5. The larger the heap size, the larger the query size can be.

You may also need to increase the application heap size.

Query block is not needed for SQL Server or Oracle databases.

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

**Schema Name:** The schema name for the database. Schema Name is not needed for SQL connections.

**Database User Id:** The username to access the database.

**Database Password:** The password for the username entered.

**Provider Type:** The type of the database

- ORACLE
- DB2
- DB2(AS400)
- MS SQL SERVER

**Database Type:** The type of database being accessed:

- **SoftRater – The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

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

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon. 

3. When you are finished entering information, click **Save**.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: PROD\_B

Environment Type: DSN

Database Server: localhost

Database Port: 1433

Query Block:

Database Name: IBSR\_Production\_B

Schema name:

Database User Id: sa

Database Password: .....

Provider Type: MS SQL Server

Database Type: SoftRater

Data Dir: C:\Inbridge\Production\_B

Default Environment: True

Buttons: Save, Delete, Test Connection!, Close

Figure 45 Environment Setup

- Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

## For JNDI Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the IBRU system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the IBRU system.

**Name:** The name of the data source.

**Context Factory:** A *URL context factory* is a special object factory that creates contexts for resolving URL strings.

**RMI:** The Java Remote Method Invocation used.

**URL Host:** The name or IP of the host server.

**URL Port:** The port number used by the host server.

**Provider Type:** The type of the database

- **ORACLE**
- **DB2**
- **DB2(AS400)**
- **MS SQL SERVER**

**Database Type:** The type of database being accessed:

- **SoftRater** – **The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

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

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon. 

5. When you are finished entering information, click **Save**.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: BATCH

Environment Type: JNDI

Name: jdbc/batchDB

Context Factory: weblogic.jndi.WLInitialContextFactory

RMI: t3

Url Host: localhost

Url Port: 7001

Provider Type: ORACLE

Database Type: SoftRater

Data Dir:

Default Environment: False

Save Delete Test Connection! Close

Figure 46 Creating a JNDI Environment

Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

### Step 3: Adding a Node:

Every IBSS instance requires a node. Nodes allow for the management of multiple environments from one location. Nodes contain cache and log information for each environment as well as a reset option.

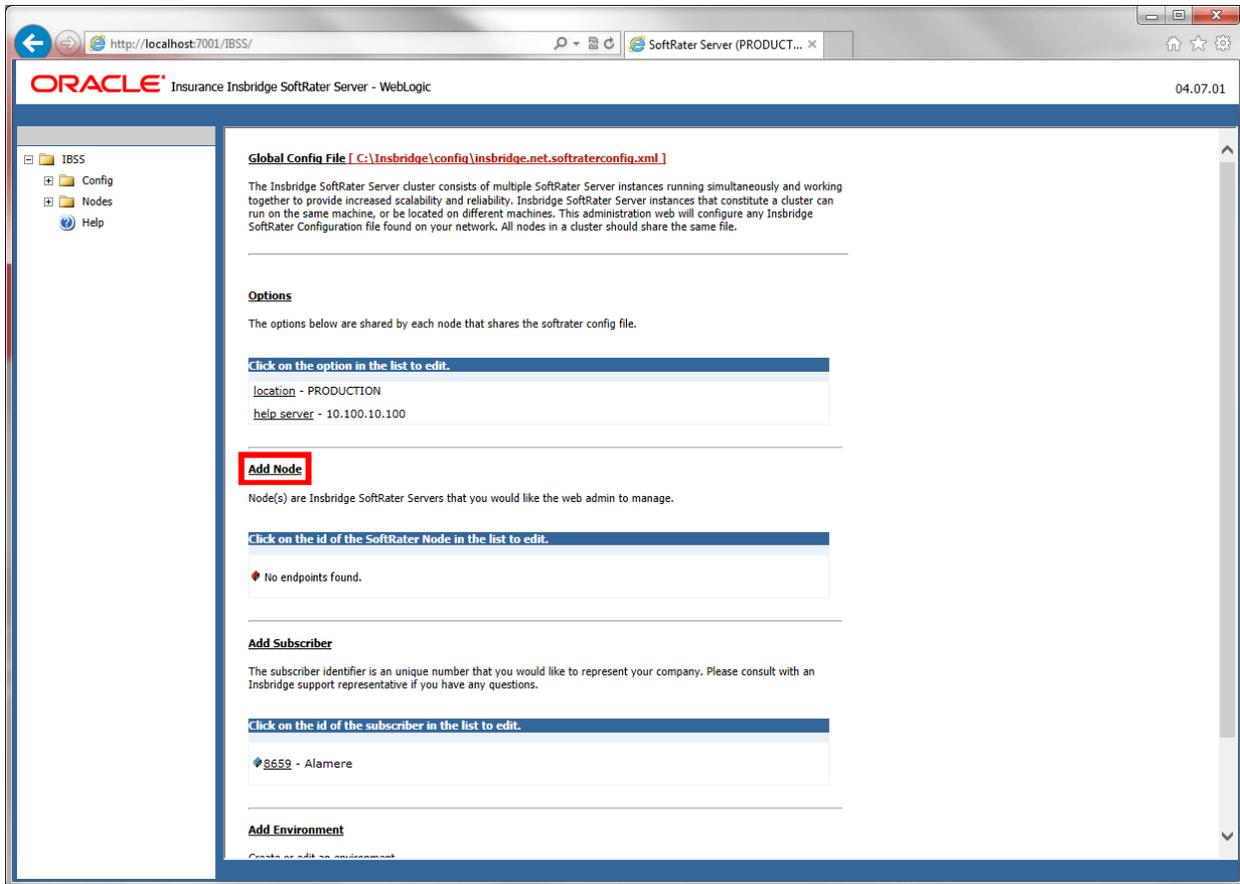


Figure 47 Adding a Controller Database Connection

To create a node, server information is needed:

- **Server OS**
- **Server Name or IP Address**
- **Port Used**

1. From the IBSS home page, click the **Add Node** link.
2. This opens the **Add Subscriber** window.



Figure 48 Adding a Node

3. Select the server operating system from the drop down. There are three choices, Linux, Mainframe and Windows.
4. Enter the server host name or IP address and port. The default ports:
  - **WebLogic:** Port 7001
  - **WebSphere:** Port 9080
  - **JBoss:** Port 8080

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

5. Enter a friendly name. This is the name displayed for the node.
6. Check if this is a secure environment. A secure environment connects using HTTPS.
7. It is recommended that the Ping Server option be used to test the connection. This is an optional step but can be helpful. If a connection cannot be made, the node cannot be saved.
8. Click **Add** to add the node. If a node cannot be added, an error message is displayed. Please correct the error and try again.

---

**NOTE:** *It is recommended that server names or IP addresses be used over localhost.*

---

## STEP 4: INSTALLATION OF DB2 CLIENT

If the DB2 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 DB2 client is all that is required. If you have more than one DB2 environment that you want to connect, for example a QA environment and a Production environment, you will only need to run the DB2 client once.

### Running the DB Client

**Run the DB2 Client.** On the machine where the IBRU system was installed, you will need to run the DB2 client for the version you have. This will allow IBFA to communicate with the DB2 database.

For a 64-bit environment, please make sure you have the 64-bit DB2 Client.

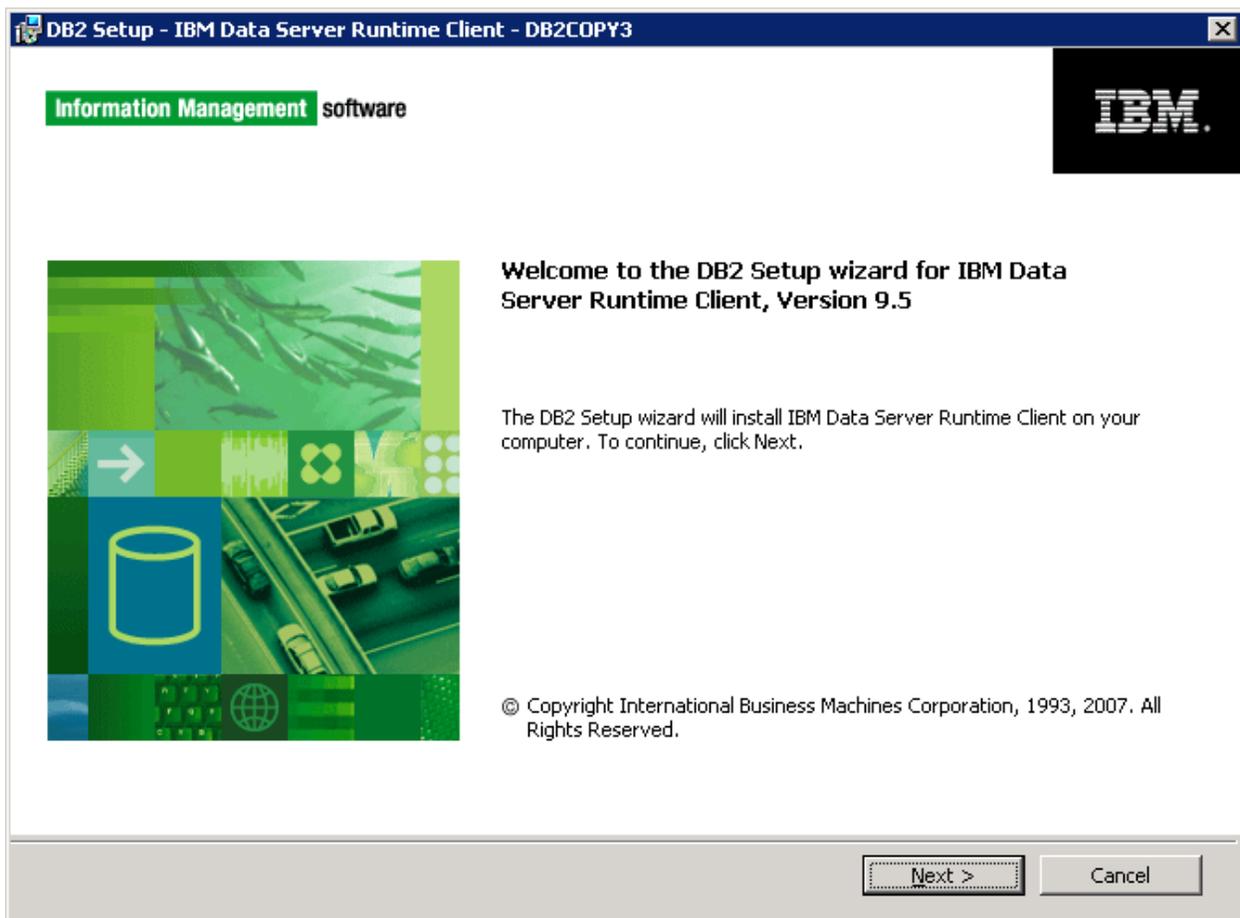


Figure 49 Installing DB2 Client and Fix Pack

1. Select the setup application. The DB2 client installation will begin.

2. Leave all the defaults and click **NEXT**. The installation will begin.
3. Click **NEXT** as the installation continues.
4. Click **Finish** to complete the installation.

## STEP 5: 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 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 WebSphere. 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 Production environment with a type of Production.
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.

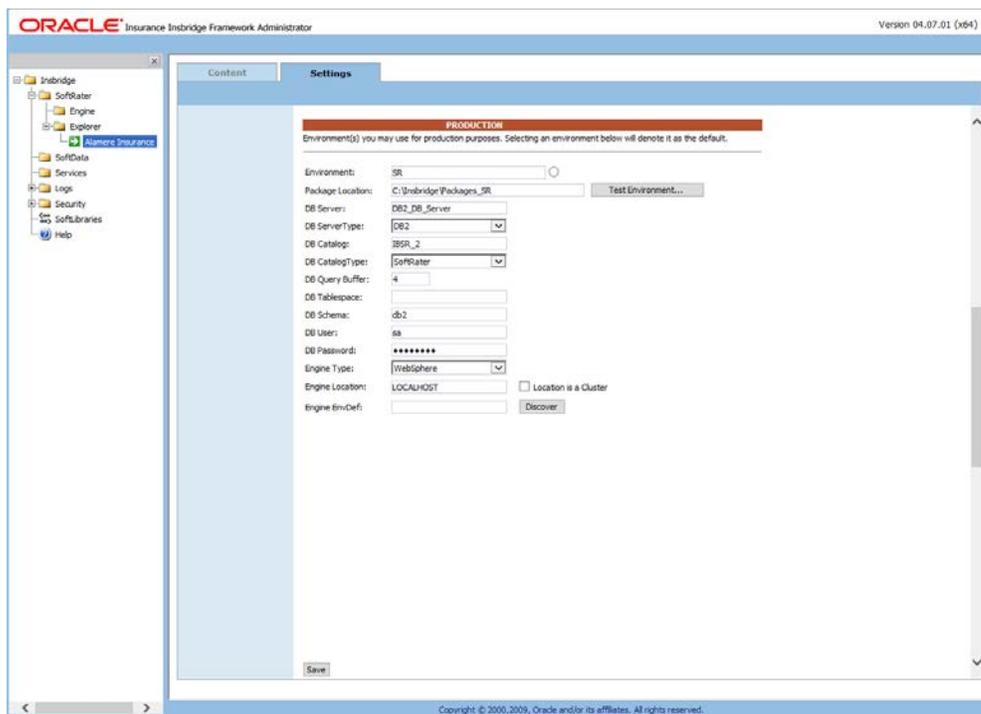


Figure 50 Editing Environment

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** is the Query Block entry from IBSS. An entry is required if you are using a DB2 database. For SQL or Oracle, no entry is needed.
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 WebSphere server may have “WBServerName:9080” 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.

---

**NOTE:** *If the WebSphere environment is not responding, you may need to stop and start the WebSphere service.*

---

For more information on setting up environments, please see the Insbridge Framework Administrator User Guide.

## SOFTRATER DATABASE REQUIREMENTS

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.*

---

## 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, DB2 and Oracle.

- **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, as defaults, the “Connect to database”, “Create Tables”, and “Create packages” authorities.

It is recommended that the databases be on separate machines from the applications due to performance and security issues. The IBRU applications and databases can be tenants in a larger setup. No known conflicts exist between IBRU and other applications or required server settings.

It is recommended that db\_owner permissions be given to the Insbridge user. This will allow scripts to be run automatically when a new package is loaded for a new line of business. If this is not possible, DT scripts for each new line will have to be run manually before the package can be loaded.

## **Microsoft SQL Server**

### **JDBC Driver Class**

“com.microsoft.jdbc.sqlserver.SQLServerDriver”

### **Supported Versions – 2005 SP/2 and 2008 R2**

### **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 – 9.5

### User Account Requirements

Connect to database  
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 `ddls\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.

## 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](http://oracle.com)

## TTY ACCESS TO ORACLE SUPPORT SERVICES

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