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Insbridge Rating and Underwriting SoftRater Node for Windows Installation

Release 4.7.1

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Oracle Insurance Insbridge Rating and Underwriting SoftRater Node for Windows Installation Guide

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PREFACE

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

NOTE: *SoftRater for Windows Node has been tested on MS Windows 2008 64-bit.*

SOFTRATER NODE

A SoftRater for Windows installation is also called a SoftRater node installation. A SoftRater node is an IBFA instance on a machine that allows for packages to be copied and loaded from environment to environment. A SoftRater node installation is done on a Windows machine and utilizes a SQL Server database.

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

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

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

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 Windows.

PLANNING YOUR IBRU SYSTEM

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

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

TYPES OF INSTALLATION

There are various types of installations:

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.
- **Full SoftRater for Windows Node** – This installation is for existing environments that want to add a SoftRater for Windows node to an environment. This is for a Windows only environment 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 Windows Node.

Definitions

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

- **IBRU** – Insbridge Rating and Underwriting System. This is the entire system.
- **IBFA** – Insbridge Framework Administrator. IBFA is an administrative tool used to configure Insbridge applications and setup RateManager database connections. IBFA will be located on a Windows Server machine. IBFA/SR-WIN is an Insbridge Framework Administrator/SoftRater for Windows.
- **IBSS** – Insbridge SoftRater Server. IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within IBRU that executes the rules, rating and underwriting instructions as defined by the user in RateManager. IBSS is usually located on a Java machine. IBSS/SR-JAVA is an Insbridge SoftRater Server/SoftRater for Java.
- **SoftRater Node** – A SoftRater node is either an IBFA (without RateManager) or IBSS instance on a physical environment.

- **SoftRater Native** – SoftRater Native is a remote instance of SoftRater that can execute rules and rating logic in environments where access via the SoftRater web-services is not desired or possible.
- **RM** – RateManager. RateManager is a component within IBRU that enables users to manage the product definition and modification process, including rating and underwriting logic.
- **SR** – SoftRater. The engine that executes the rating, rules and underwriting instructions defined within RateManager. The rating environment for runtime execution and processing of business content. SoftRater can be further defined by the operating system where it has been loaded.
- **SR-WIN** – SoftRater for Windows. This is also another name for IBFA.
- **SR-JAVA** – SoftRater for Java. This is also another name for IBSS.
- **SRP** – SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.
- **VFS** – Virtual File Servers. Virtual file server management allows you to access environments that are located on other machines in different locations where packages can be downloaded.
- **Package Location** – A pointer to a location where SoftRater Packages (SRP's) are stored.
- **Physical Environment** – A physical environment is generally referred to as a physical machine.
- **Authoring Environment** – The physical machine where RateManager is installed.
- **Rating Environment** – The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
- **Logical Environment** – An environment created for a subscriber in IBFA. It defines package location, engine location and database location in addition to several other supporting data items. This environment is used for rating and/or SRP management. Each database connection will have a logical environment.

RELATE DOCUMENTS

For more information, refer to the following Oracle resources:

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

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

CONVENTIONS

The following text conventions are used in this document:

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

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-703-01		May 2011	Initial Release
2nd Edition	P01-703-02	R 4.5.1	September 2011	Update Release
3rd Edition	P01-703-03	R 4.6	May 2012	Update Release
4th Edition	P01-703-04	R 4.6.1	November 2012	Update Release
5th Edition	P01-703-05	R 4.7	September 2013	Update Release
6th Edition	P01-703-05	R 4.7.1	November 2013	Update Release

Chapter 1

SYSTEM REQUIREMENTS

IBRU installers should be familiar with managing a Windows server. There are two options for the IBRU install, 32-bit or 64-bit. Please be sure you have downloaded the correct install for your machine.

Required Components

The following components, web server roles, and features are required:

- **A full installation of Microsoft Windows Server 2008**
- **Microsoft .NET Framework version 3.5**
- **IIS: Internet Information Services version 6.0 or 7.0**
- **Web Server Role: IIS 6 Metabase Compatibility**
- **Web Server Role: (IIS) Static Content**
- **Web Server Role: ASP.NET**
- **MSMQ: Microsoft Message Queuing Services, basic functionality only.**
- **Insbridge User Account**
- **Database name or Environment name**
- **Database login information**
- **Database server name, either IP or DNS**
- **Database backup file, IBSR_Template for SQL Server. This file is located in the 04.07.01 Insbridge IBRU folder.**
- **Access to the server where the IBRU system was installed**
- **URL of the current IBFA**
- **Subscriber ID**
- **Package location where you want the packages stored**

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

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. There are two options for the IBRU install, 32-bit or 64-bit. Please be sure you have downloaded the correct install for your machine. This option also includes SoftRater for Windows.
- **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

No license file is required.

SoftRater for Windows 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.

The folders and files that you download will depend upon the kind of setup you want. Everything for an SR-WIN installation is in the **04.07.01-Insbridge-IBRU** folder. If you want to incorporate a Java environment, please download the corresponding SoftRater file.

Internet Explorer

IBSS and IBFA are accessed via web browser. Please verify that you are using Internet Explorer 8.0 or 9.0 (32-bit). As of release 04.07.01, Internet Explorer 8.0 and 9.0 (64-bit) are not supported.

SOFTRATER FOR WINDOWS INSTALLATION

Installing SoftRater for Windows requires that you:

1. Set up Windows. There are three steps in setting up Windows for a RateManager deployment.
2. Install IBRU using a SQL Server Database

Setting up Windows

Step 1: Set up an Insbridge User.

Step 2: Windows 2008 web server roles.

Step 3: Verify SQL Server settings.

Installation Procedures: Full RateManager

Step 1: Install Insbridge Rating and Underwriting

Step 2: Configuring Registry Access

Step 3: Creating an Insbridge Application Pool

Step 4: Assigning Permissions: Windows Temp Folder

Step 5: Assigning Permissions: Insbridge Folder

Step 6: Restoring IBSR Databases in SQL Server

Step 7: Configuring Insbridge Framework Administrator

Step 8: Verifying the Component Services

Step 9: Allowing for WCF Activation

Step 10: Installing the OBI Publisher

Step 11: Starting Insbridge Services

Step 12: Create Backup of Registry Key

Step 13: Connect IBSR to IBFA

Chapter 2

SETTING UP WINDOWS

IBRU installers should be familiar with managing a Windows server.

If you are installing on a 64-bit machine, please make sure you have the IBRU 64-bit download.

Windows Server should be up and running prior to RateManager being installed. There are two steps that should be performed prior to the install:

- **Step 1:** Set up an Insbridge User. **This is a required step.**
- **Step 2:** For Windows 2008, allow permissions.
- **Step 3:** Verify SQL Server settings.

STEP 1: INSBRIDGE LOCAL USER ACCOUNT SETUP

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

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

To Create a New User:

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

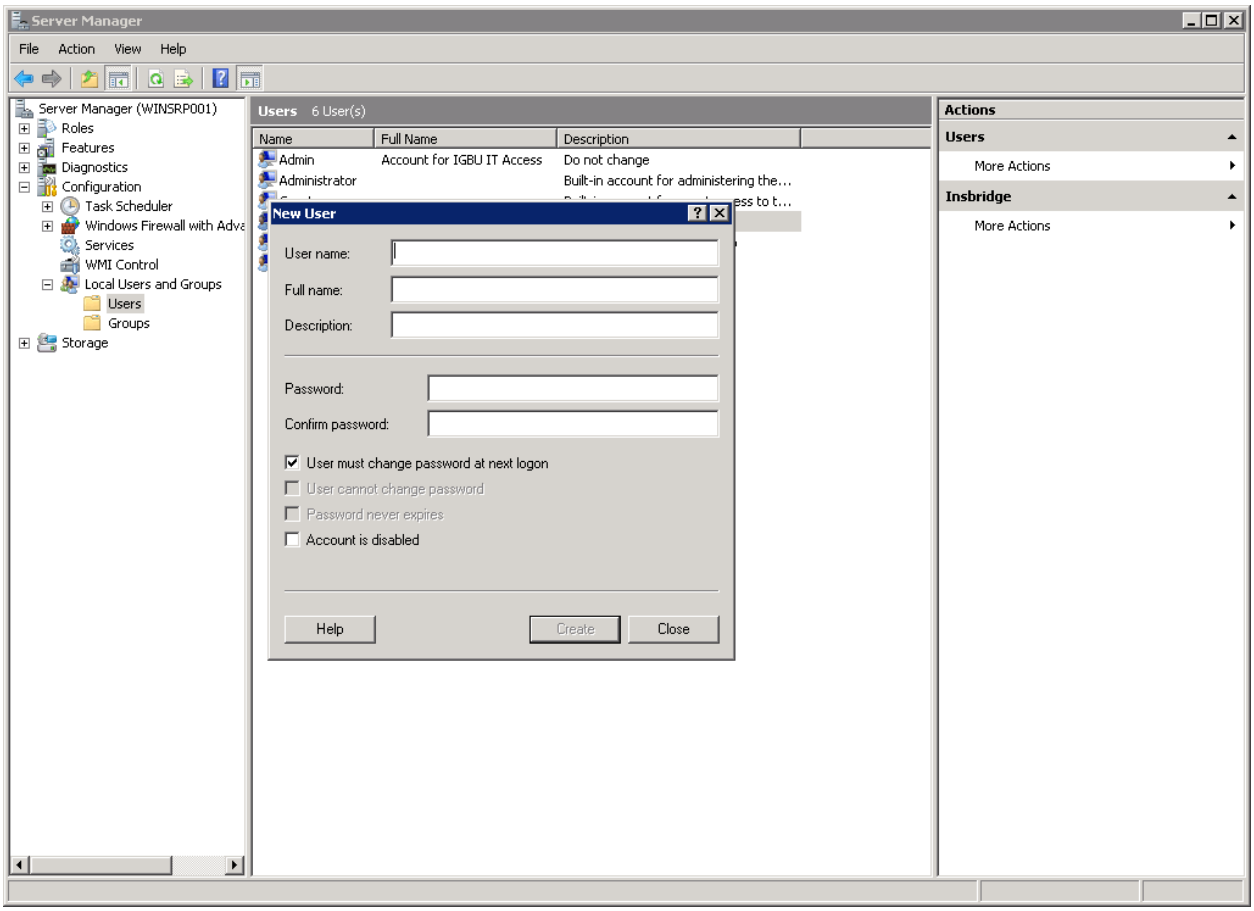


Figure 1 Creating New User

5. Add a new Insbridge user. Enter user name and password information. Uncheck *User must change password at next logon*. Check *User cannot change password* and *Password never expires*.

6. Click **Create**.

7. Close the Add New User screen and select the Insbridge user. Right click and select Properties.

8. The Insbridge User should be assigned to the local Users group and have the same permissions as the internet guest account.

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

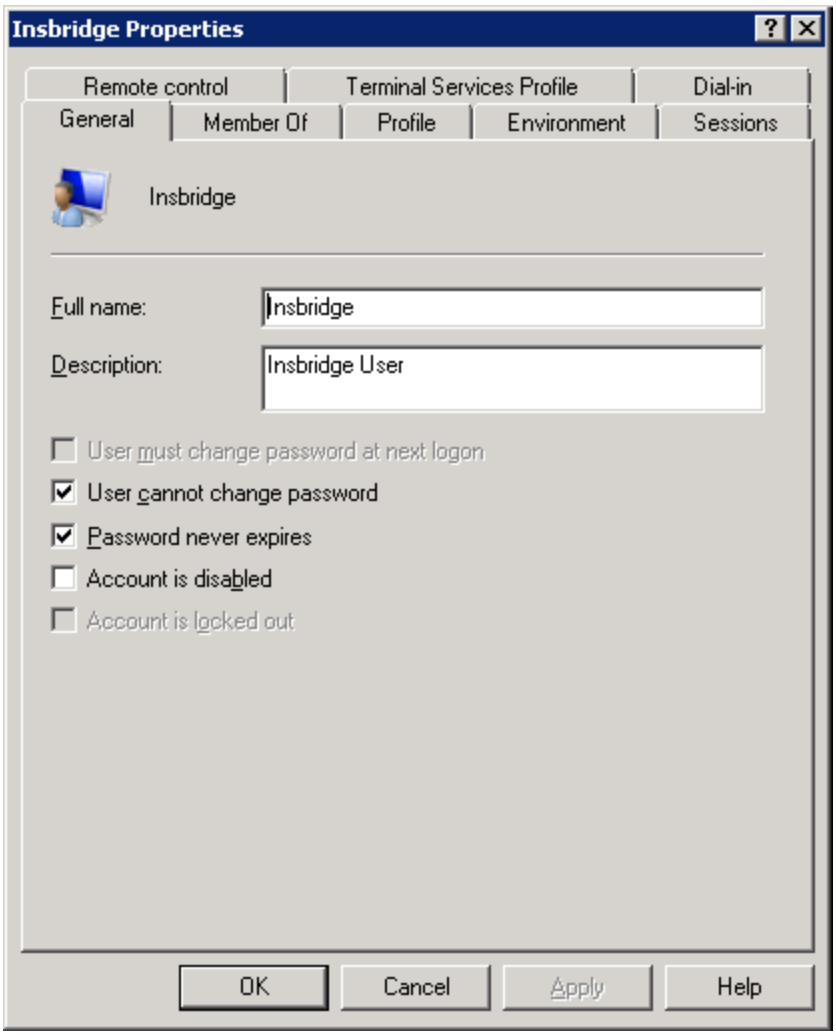


Figure 2 Adding User information

9. Click **OK**. Please keep the Insbridge user information close at hand. You will need it for the installation.

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

Insbridge User Password

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

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

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

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

STEP 2: WINDOWS 2008 PERMISSIONS

Windows 2008 requires that certain web server roles are in place prior to running the install.

- **Web Server Role: IIS 6 Metabase Compatibility**
- **Web Server Role: (IIS) Static Content**
- **Web Server Role: ASP.NET**

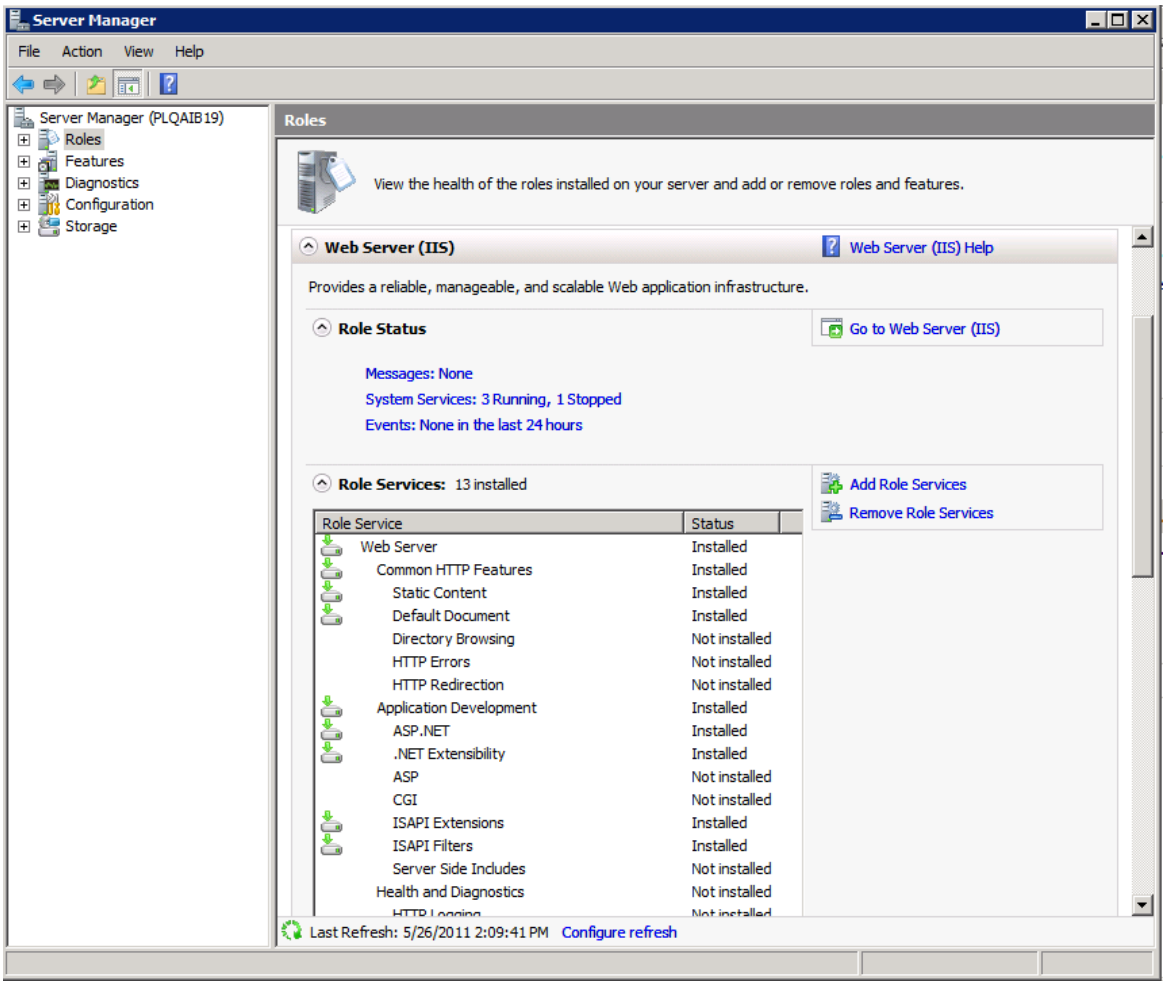


Figure 3 Windows 2008 Web Server Roles

To Add a Role:

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

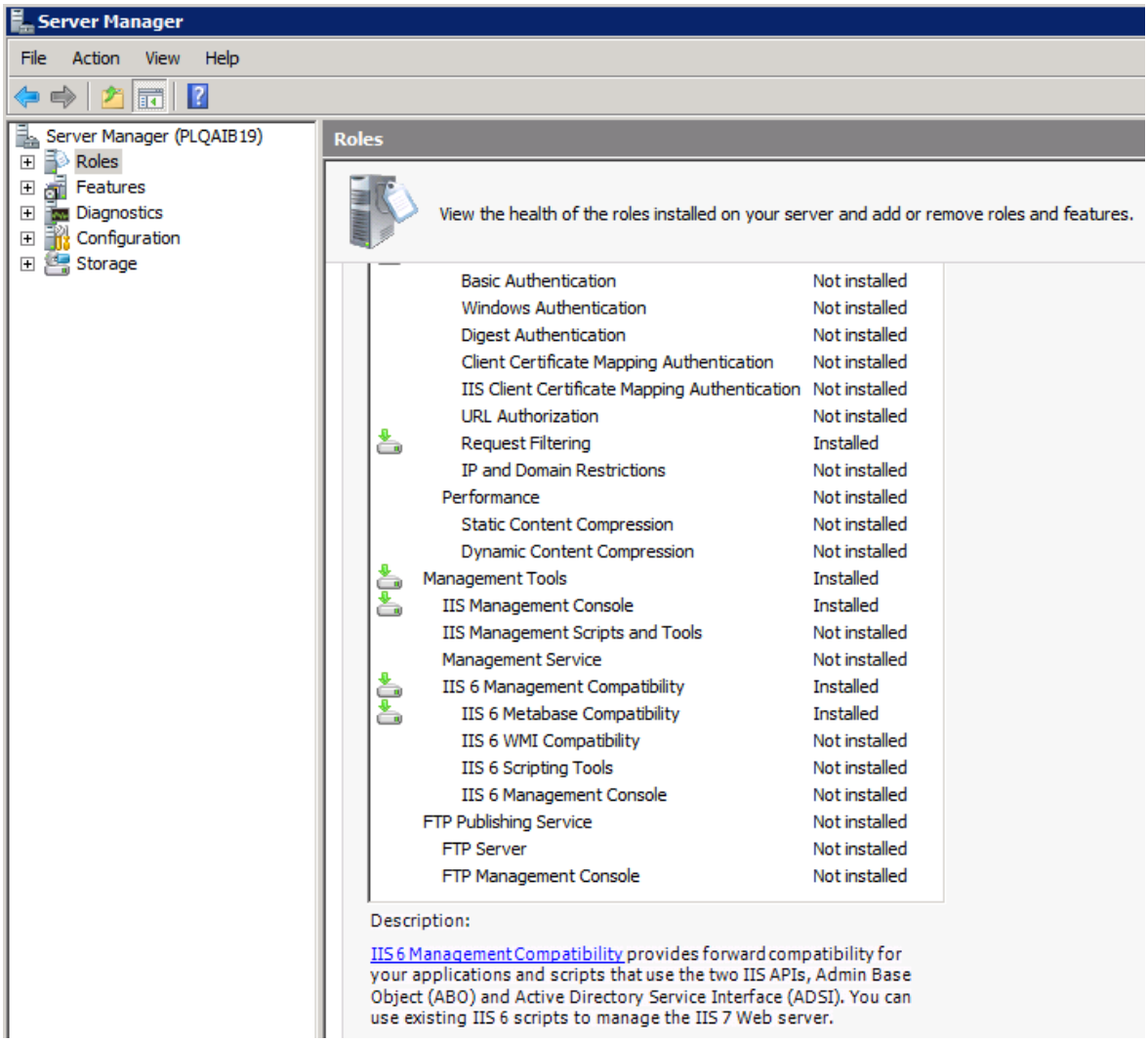


Figure 4 Adding IIS 6 Metabase Compatibility

2. Install IIS 6 Metabase Compatibility.
3. Install Static Content.
4. Install ASP.NET

Extended Permission Required by the Insbridge User

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

STEP 3: MICROSOFT SQL SERVER

For the Insbridge 04.07.01 release:

- The IBSR database has been tested on MS SQL Server 2008 SP/1 on MS Windows 2008 64-bit.

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

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

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

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

- **Server Authentication:** Should be set to SQL Server and Windows Authentication mode.
- **Collation and Sort Order:** Currently supported is the default SQL Server collation using SQL_Latin1_General_CP1_CI_AS and sort order plus case sensitivity using Latin1_General_BIN as the server collation. The security database (IB_CLIENT) supports the default SQL Server collation using SQL_Latin1_General_CP1_CI_AS. The RateManager and SoftRater databases can use either case sensitive or non-case sensitive. Please check with Oracle Insurance for any questions regarding database server sort orders or collations.

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

DATABASE USER ROLES AND PERMISSIONS

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

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

Recommended RateManager Permissions:

It is recommended that the IBRM and IB_CLIENT database user have:

- **A database owner (db_owner) role.** db_owner access is needed to execute the Insbridge stored procedures and have full access to the Insbridge schema.
- **Disk Admin permissions** are also recommended in order to create backups within RateManager.

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

Chapter 3

SOFTRATER FOR WINDOWS NODE INSTALLATION

This installation will install SoftRater for Windows. This is for a Windows only environment, using a SQL Server database.

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

The installation should be performed in the following order:

1. Install the IBRU application.
2. Assigning Insbridge access to the Registry.
3. Create an Insbridge Application Pool.
4. Assigning permissions to the Insbridge User for the Windows Temp Folder. This is necessary MSMQ. You also need to assign permissions to the Application Pool Identity.
5. Assigning permissions to the Insbridge User for the Insbridge Folder.
6. Creation of the IBSR database is next.
7. Enter IBFA and Configure:
    a. Create a subscriber.
    b. Create a SoftRater environment.
    c. Creating a Virtual File Server.
8. Verifying Component Services.
9. Allowing for WCF Activation. This is required.
10. Install OBI Publisher.
11. Start Insbridge Message Service.
12. Create Backup of Registry Key.
13. Connect IBSR to IBFA

Installation must be run as Administrator.

STEP 1 – INSTALL INSBRIDGE RATING AND UNDERWRITING

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

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

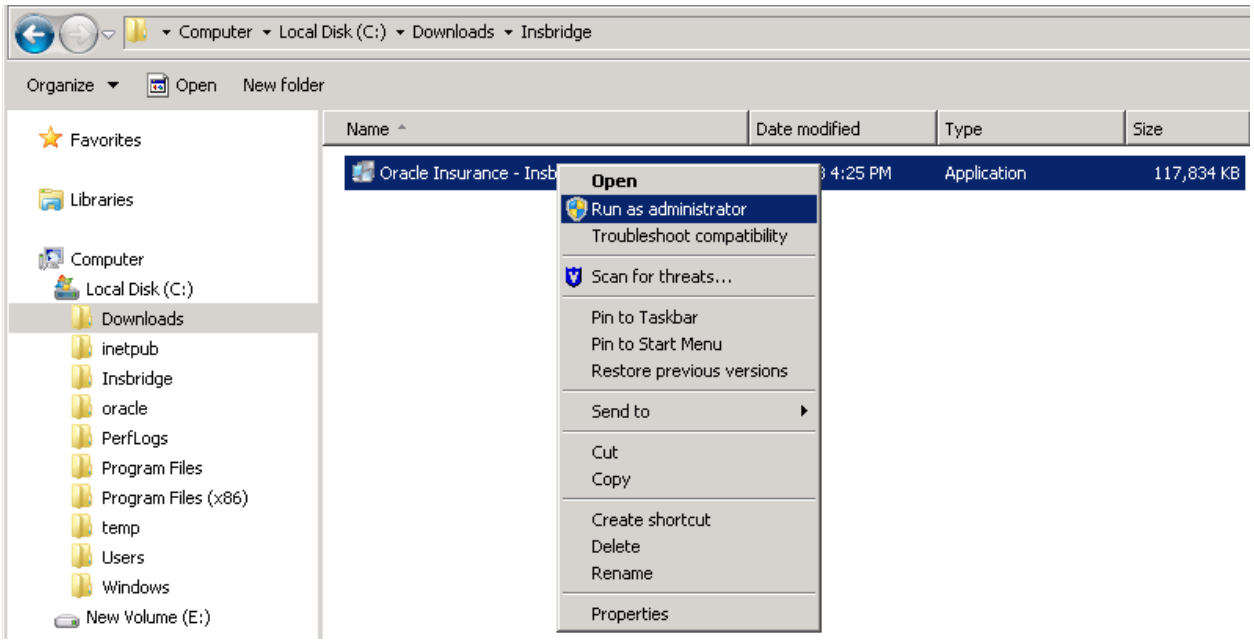


Figure 5 Install as Administrator

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

2. Open the Oracle Insurance - Insbridge Rating and Underwriting file. A Welcome screen is displayed.

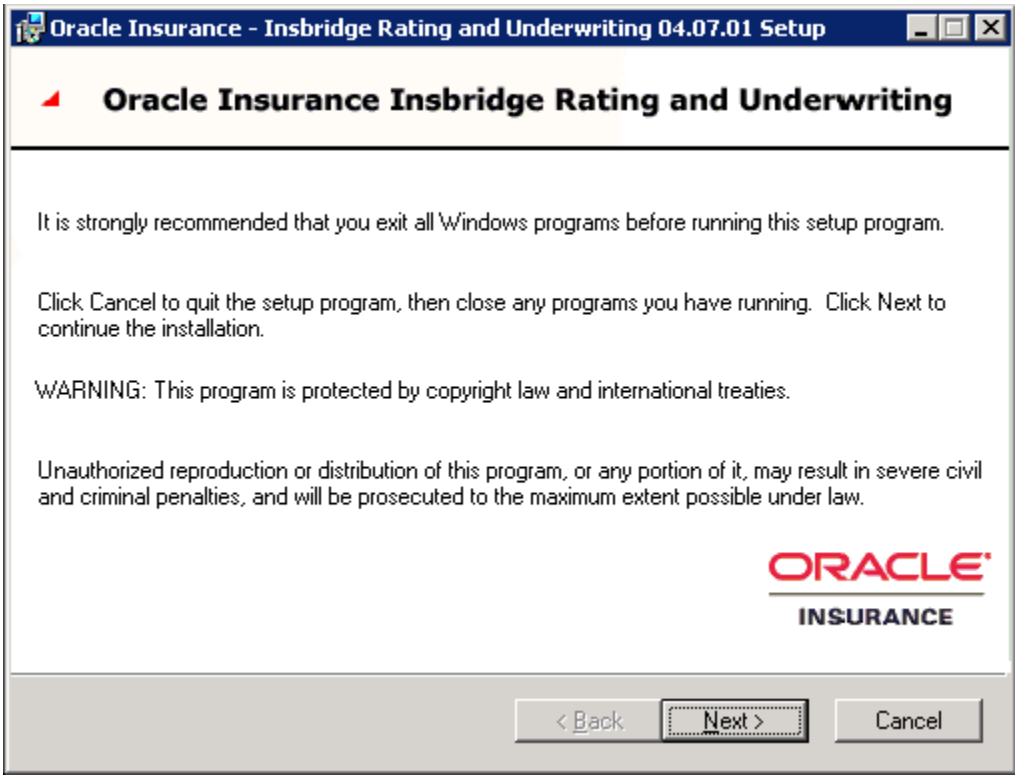


Figure 6 Installing Insbridge

3. Click **Next** to continue.

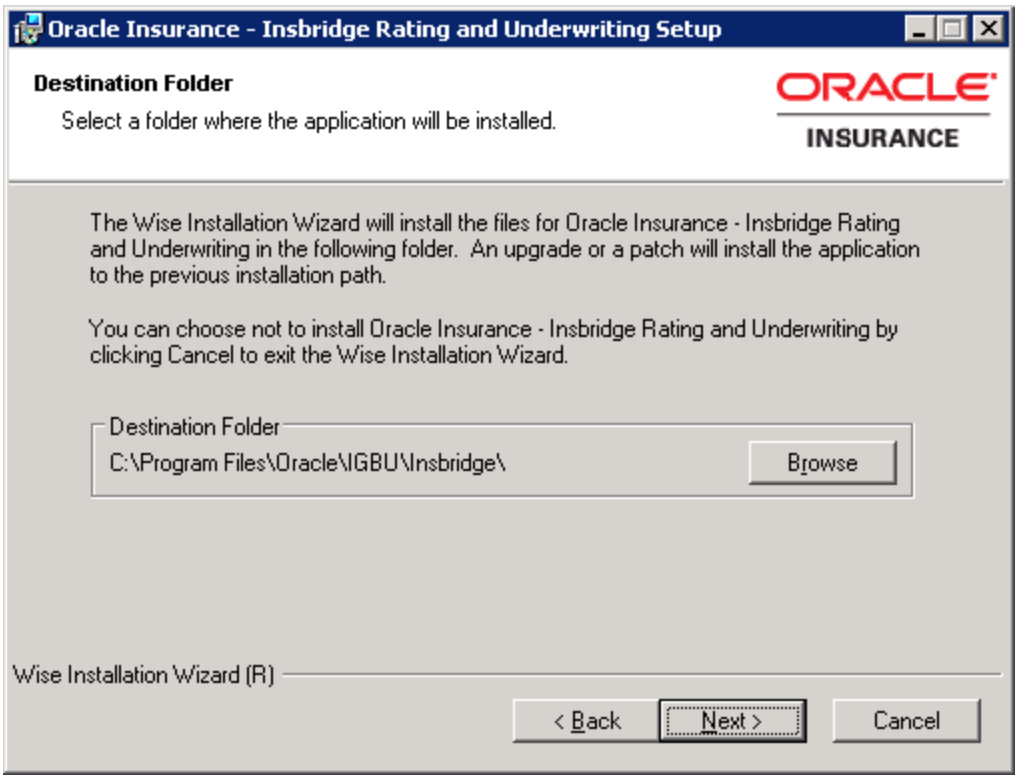


Figure 7 Entering the Destination Folder for Insbridge

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

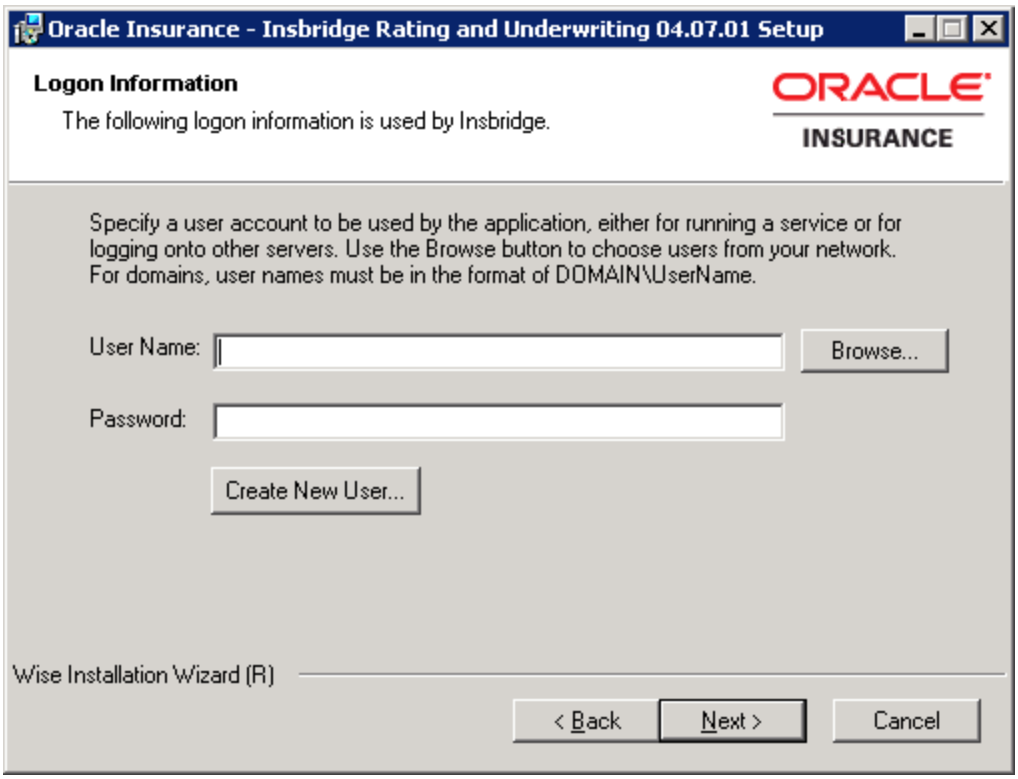


Figure 8 Logon Information

5. Enter the **Insbridge user name and password** for the local user account you set up earlier. The logon information screen is displayed. You must specify a user account to be used by the application. Please use the Insbridge user account that you set up on page **Error! Bookmark not defined.**.

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

6. Click **Next** to continue.

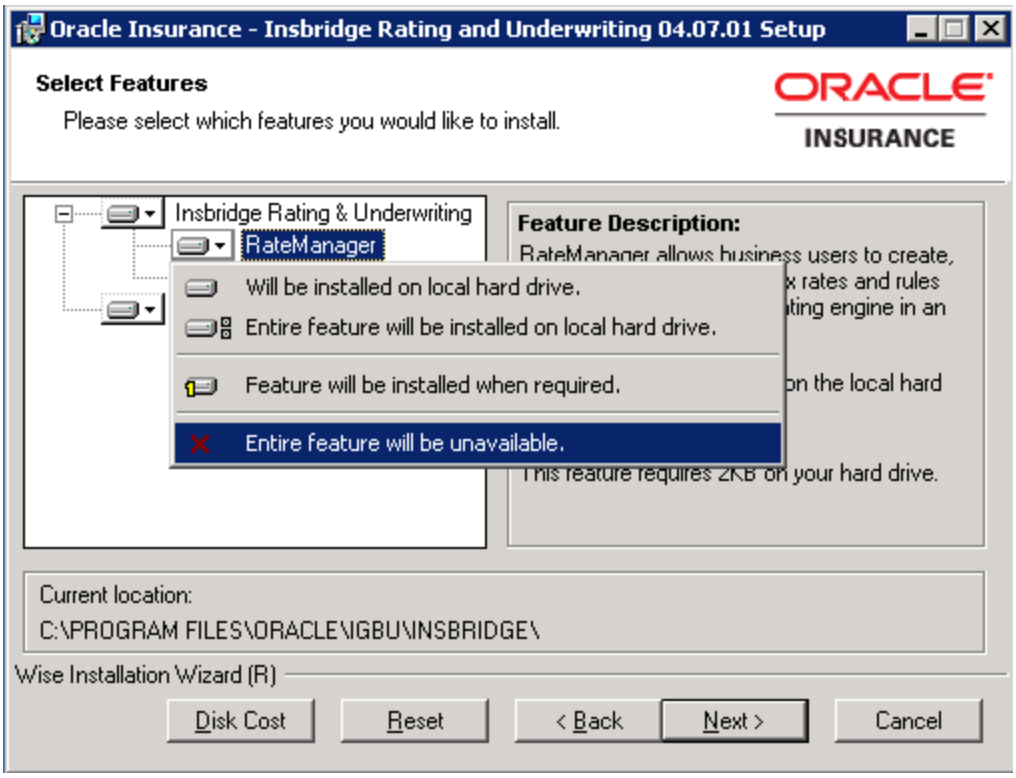


Figure 9 Selecting Features for Installation

7. The next screen lists the applications to be installed. To expand the options and view details, click on the downward arrow. All features are checked for installation. Select RateManager and select the **Entire feature will be unavailable**. Click **Next** to continue.

Options are:

- **Insbridge Rating and Underwriting**:
  - The default option is: Entire feature will be installed on local hard drive.
  - You will not be able to opt out of this selection.

- **RateManager**:
  - The default option is: Entire feature will be installed on local hard drive.
  - You will be able to opt out of this option. Select Entire Feature will be unavailable. RateManager will not be installed. **You do not need to install RateManager.**

- **IBFA**:
  - The default option is: Entire feature will be installed on local hard drive.
  - You will not be able to opt out of this selection.

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

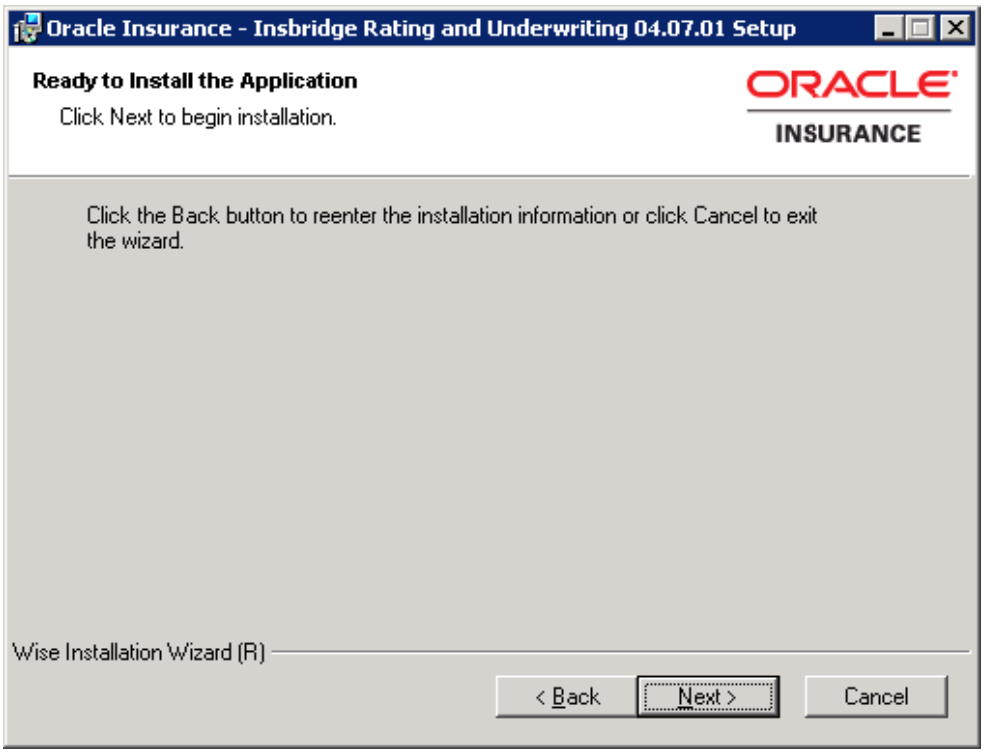


Figure 10 Ready to Install

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

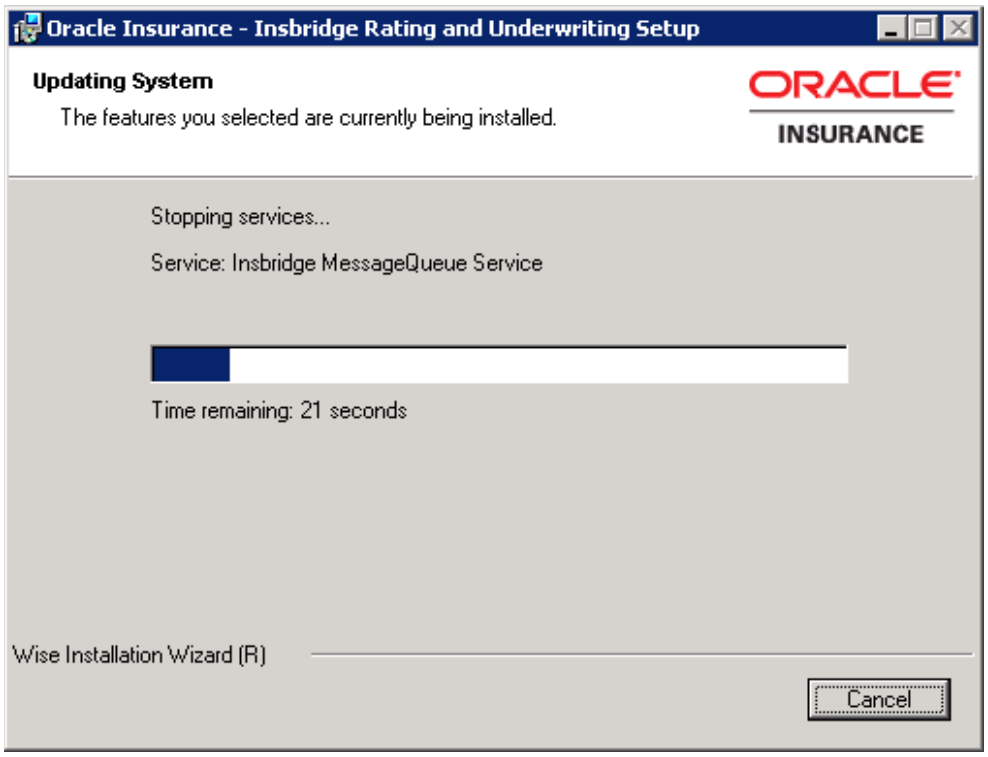


Figure 11 Installation Progress

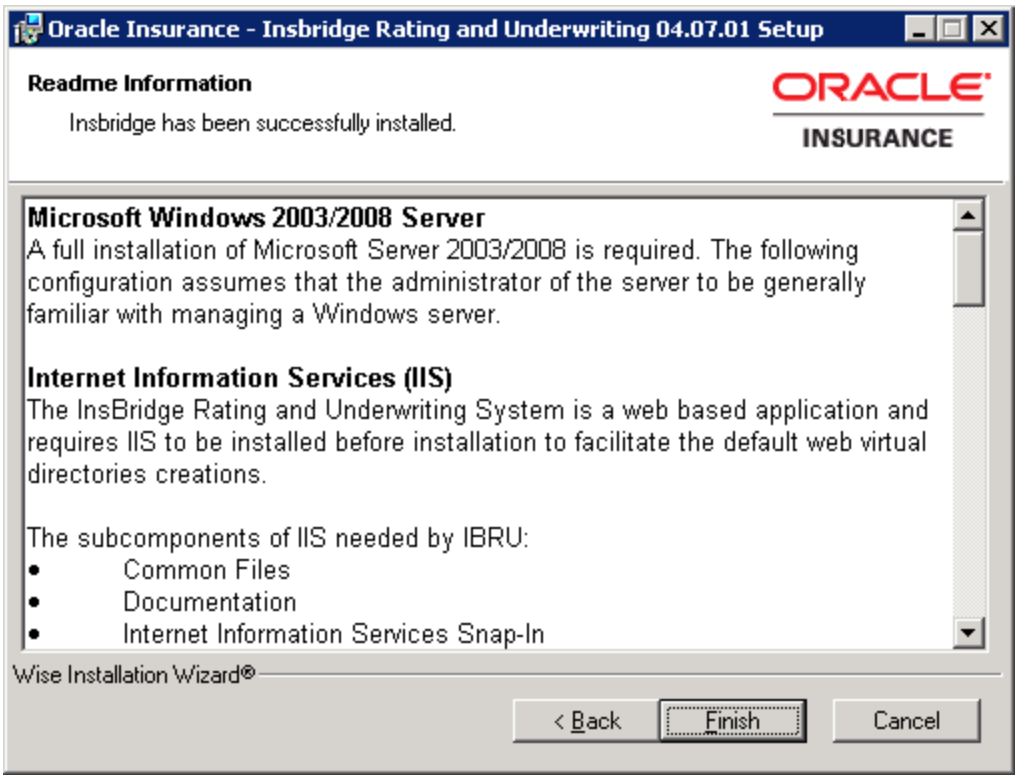


Figure 12 Install ReadMe Screen

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

STEP 2 – CONFIGURING REGISTRY ACCESS

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

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

HKEY_LOCAL_MACHINE/SOFTWARE/Insbridge

Assigning Permissions for the Registry Access

1. Selecting Run from the Start Menu.

2. Type **regedt32**. Click **OK**. The Registry Editor will open.

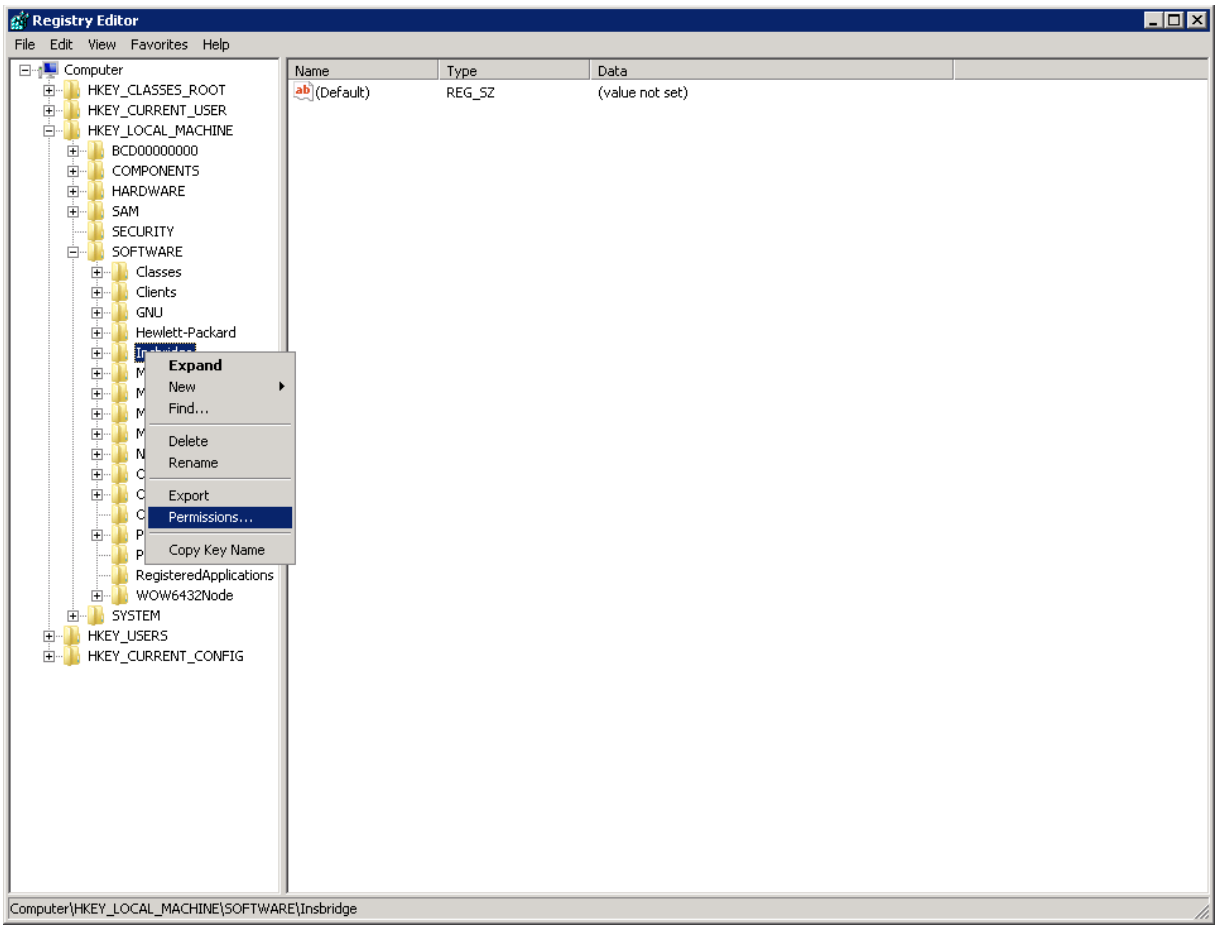


Figure 13 Configure Registry Access Windows Server

3. **Browse** to HKEY_LOCAL_MACHINE. **Select SOFTWARE→Insbridge**.

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

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

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

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

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

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

Adding the Insbridge User:

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

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

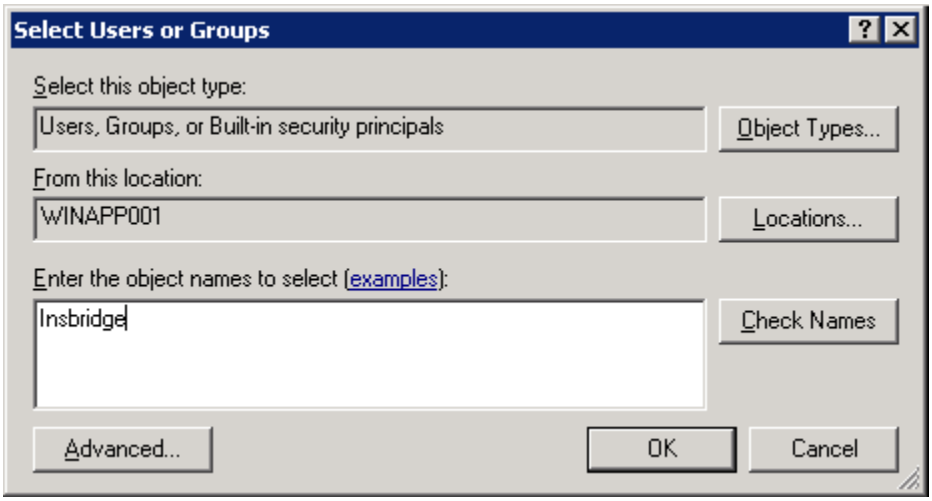


Figure 14 Entering the User

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

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

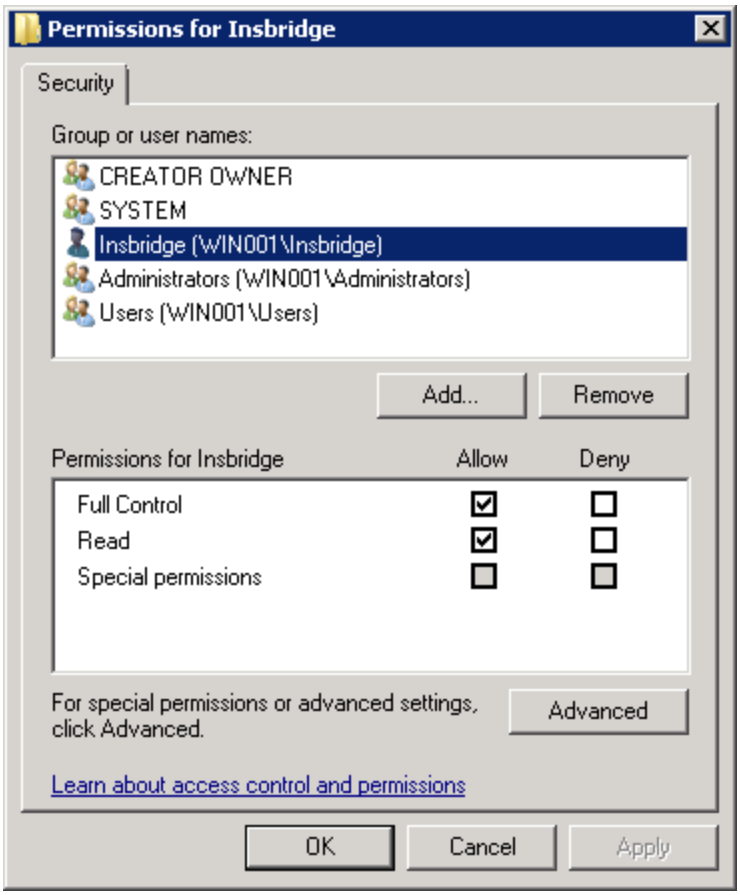


Figure 15 Applying Permissions

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

15. Click **OK**.

16. Close the registry and continue with the install.

STEP 3: INSBRIDGE APPLICATION POOL

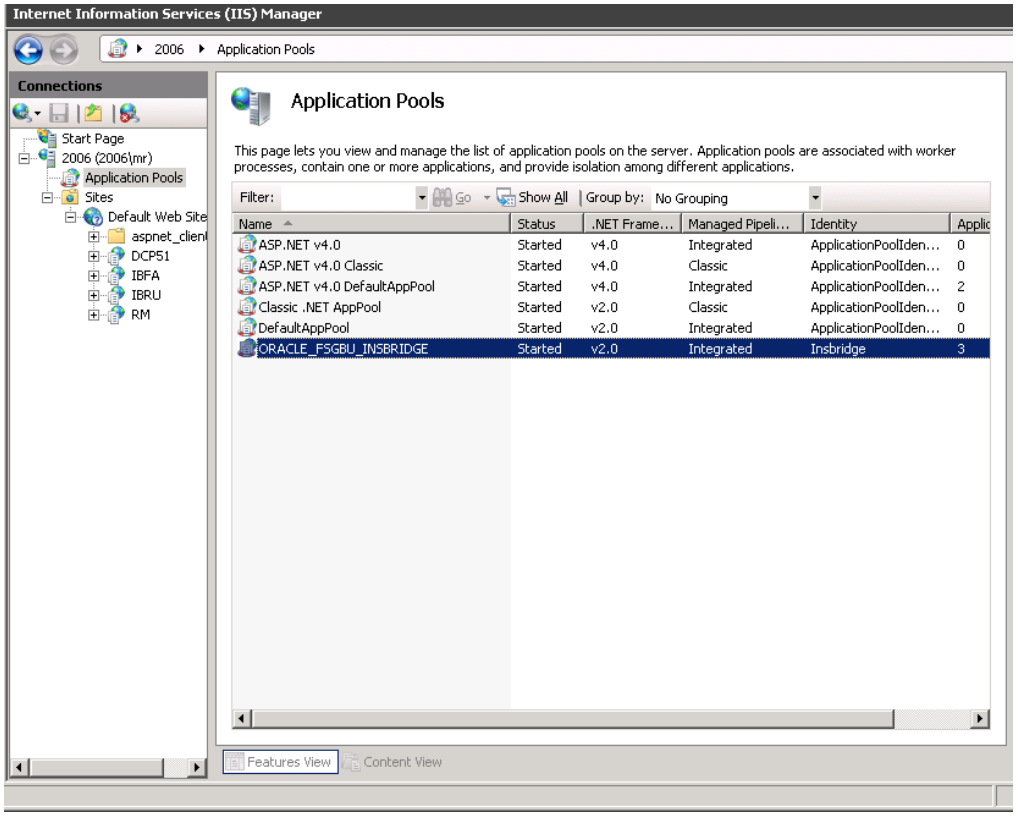
Insbridge requires .NET framework setting of v2.0. This may present conflicts with other applications in the default application pool that require a higher setting. To avoid conflict and improve performance, a separate Insbridge Application Pool must be created.

Verify the Insbridge Application Pool

A default Insbridge Application Pool is created at installation. This pool ORACLE_FSGBU_INSBRIDGE should be used for the Oracle applications. Please verify that the Insbridge web applications are associated with the new Insbridge application pool.

1. Click **Start** → Administrative Tools → select **IIS Manager**.

2. Expand the **Local Computer** and select **Application Pools**. Verify the ORACLE_FSGBU_INSBRIDGE application pool, the Identity is Insbridge and that there are 3 applications associated. If all pool is correct, proceed to the next step.



If the ORACLE_FSGBU_INSBRIDGE has not been created, you will have to create one. There are three steps to creating an Insbridge application pool and then assigning the virtual directories.

- **Step 1:** Create or Verify an Insbridge Application Pool.
- **Step 2:** Verify settings.
- **Step 3:** Associate the Insbridge application pool with virtual directories IBFA, IBRU, RM

Creating an Application Pool

If the application pool has not been created, you can create one. The Insbridge installation must be complete prior to creating an application pool. Make sure that Static Content is enabled in the Server Manager Roles.

1. Click **Start** → Administrative Tools → select **IIS Manager**.

2. Expand the **Local Computer** and select **Application Pools**. Right click and select Add **Application Pool**.

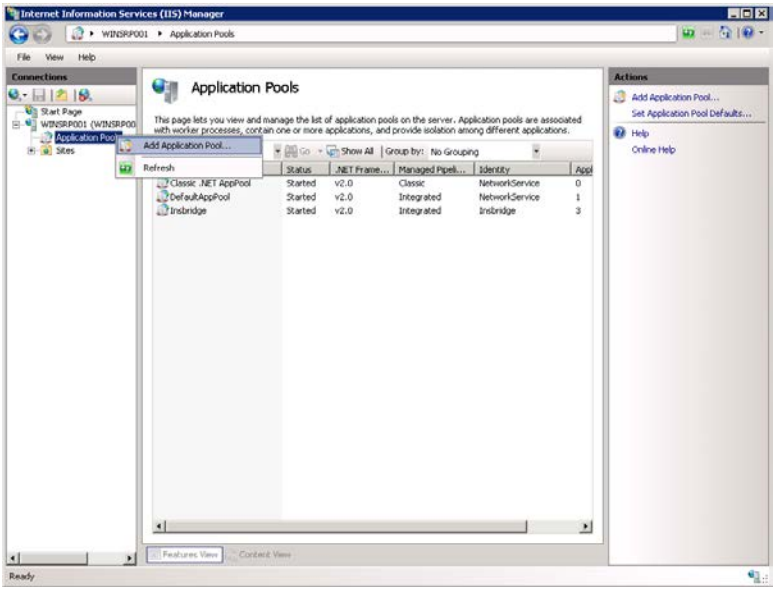


Figure 16 Navigating to Application Pool

3. Enter "**Insbridge**" for the Application pool Name. Select the **v2.0 for the .NET Framework version**. Click **OK**. You will be returned to the IIS screen. Your new application pool is listed.

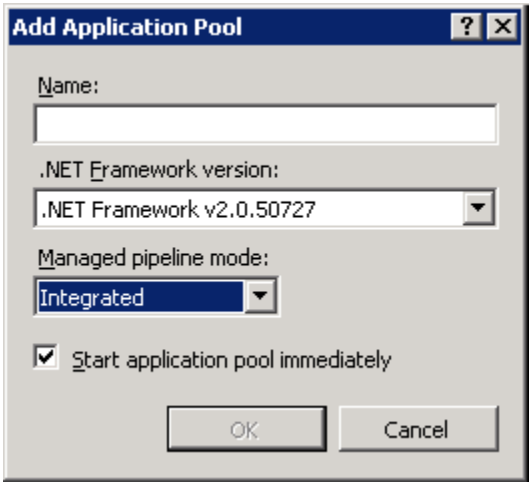


Figure 17 Creating a New Application Pool

Step 2: Update Settings

1. Right click the Insbridge Application Pool you created and select **Advanced Settings**.

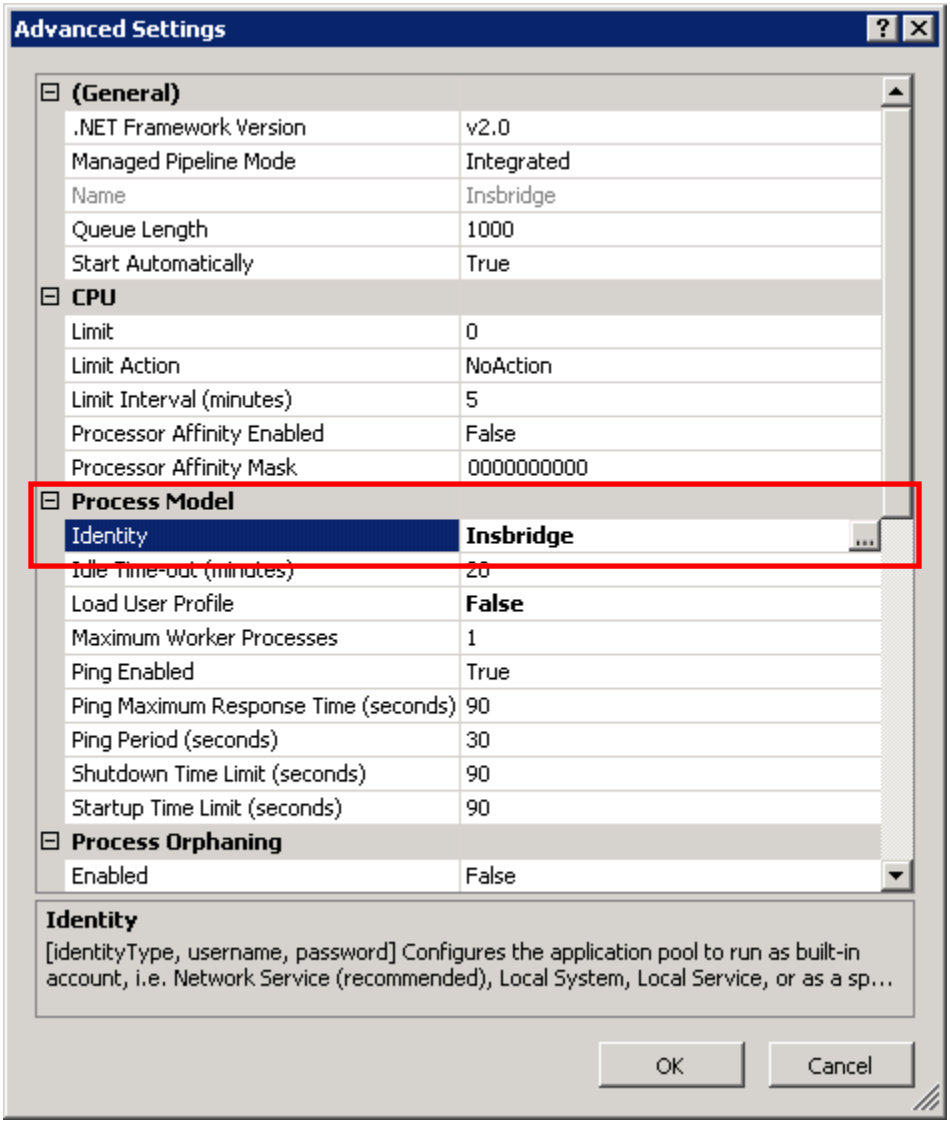


Figure 18 Selecting Application Pool Properties

2. Verify that the .NET Framework Version is v2.0.

3. For the Identity **choose to use custom account and enter the same user that was used to install IBRU**.

4. Click **OK** to save your changes.

Step 3: Associate the web applications with the Insbridge Application Pool

Next, you will need to association the Insbridge web applications with the new Insbridge application pool.

1. Stay in IIS Manager. Under **Local Server → Sites →** select **IBFA**, right click and select **Manage Application→ Advanced Settings**.

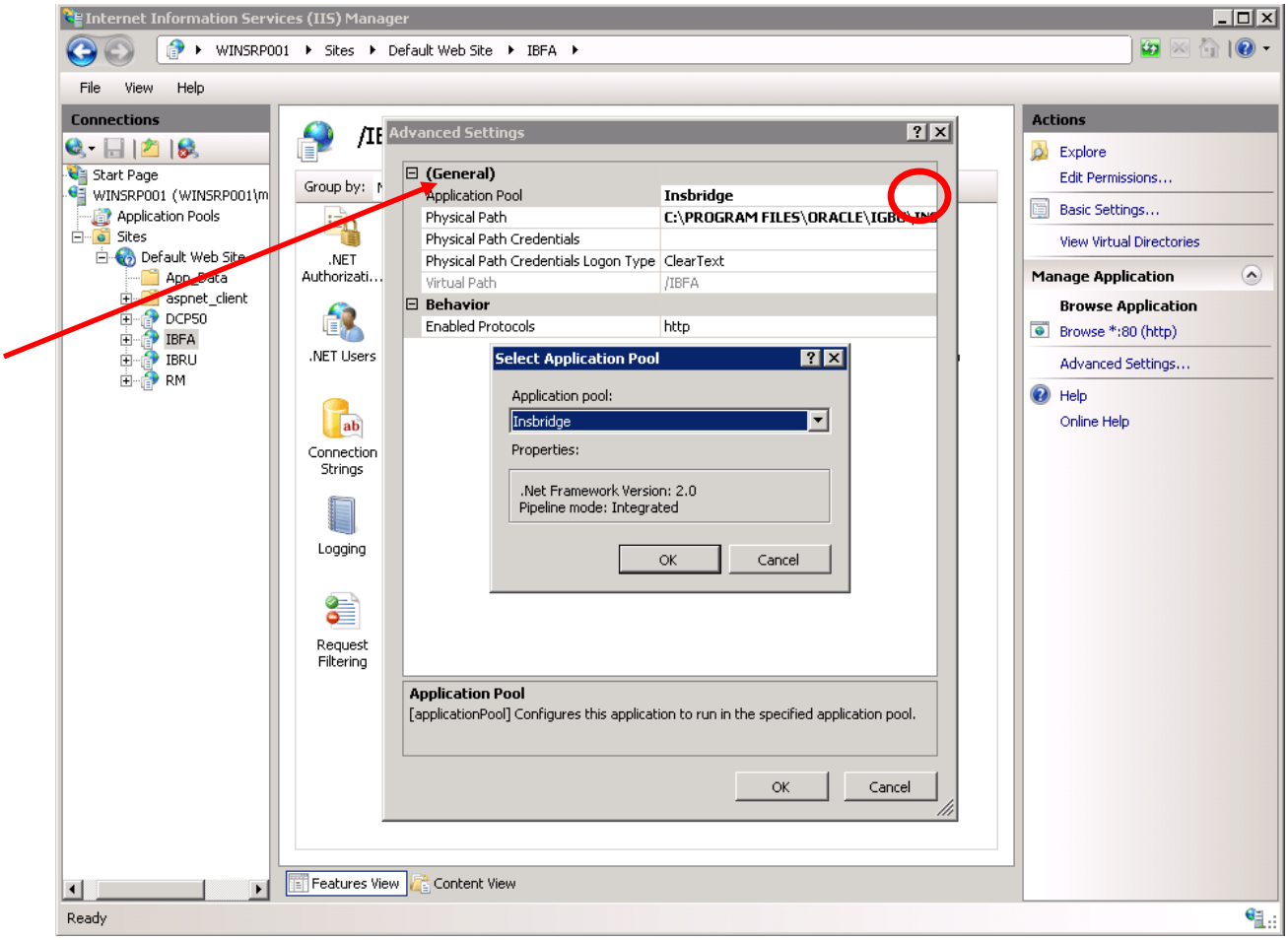


Figure 19 Associating the Virtual Directories with the Insbridge Application Pool

2. Under the General Settings → Application Pool, click the Application Pool entry field to see the ellipsis (…) button.

3. Click the ellipsis button. A separate window is displayed.

4. Select the **Insbridge Application Pool**.

5. Click **OK**. Click **OK** again to close the Advanced Settings window.

6. Repeat for IBRU.

7. Verify that the Insbridge application pool has at least two sites. Select Local Server-> Application Pools.

8. Right click to View Applications. The three Insbridge applications should be listed.

9. Restart IIS. On the IIS screen, **Actions-> Restart IIS**.

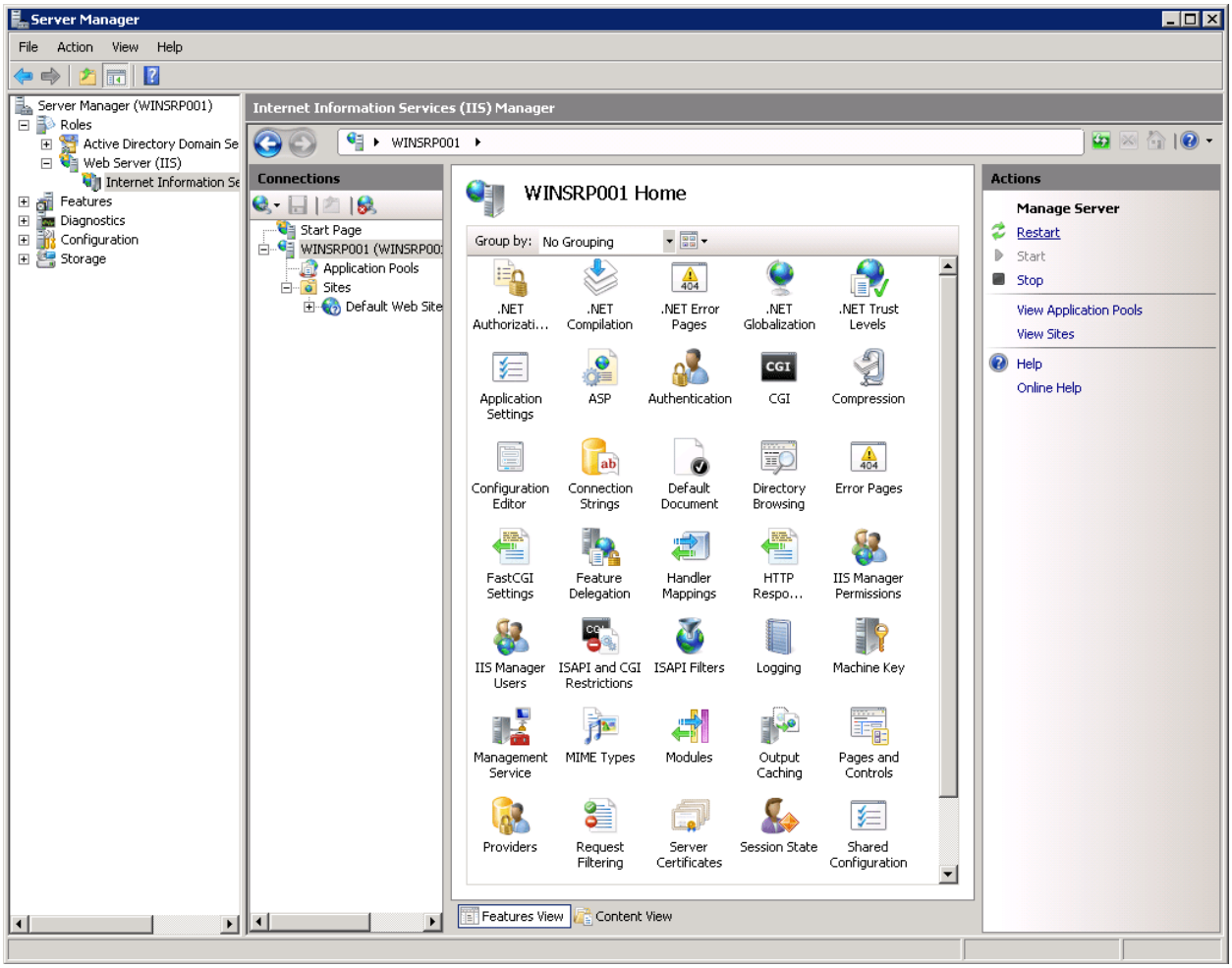


Figure 20 Restarting IIS

Application Pool Error

If you choose not to create an Insbridge Application Pool, the Insbridge application will use the default application pool. If you receive an error when accessing IBFA for the first time after a new install:

> CS0016: Could not write to output file 'c:\Windows\Microsoft.NET\Framework64\v2.0.50727\Temporary ASP.NET Files\ibfa\783d6267\bcca0b3e\App_global.asax.zf-kqiii.dll': 'Access is denied. '

You may have to create a separate Insbridge Application Pool.

STEP 4 – ASSIGNING PERMISSIONS – WINDOWS TEMP FOLDER

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

Assigning Permissions in the Windows Temp Directory:

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

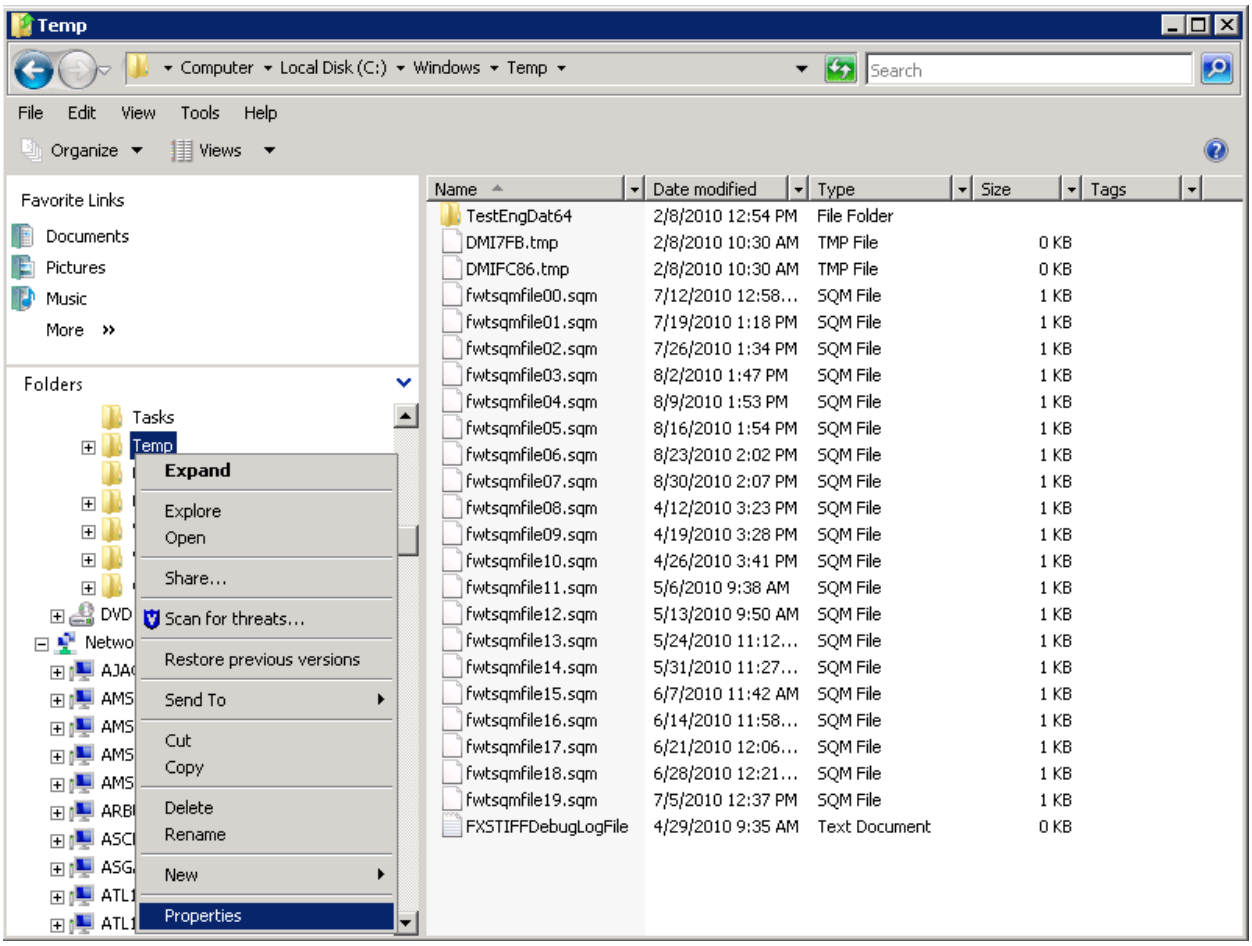


Figure 21 Assigning Permissions for the Insbridge User on Windows Temp

3. Select **Properties**. The Temp Properties screen opens.
4. Select the **Security** tab.
5. Click **Edit**.
6. On the Permissions for Temp screen, select the Insbridge user and click Add. If the Insbridge user is not found, cancel out and return to the Local Users and Groups area in Server Manager and verify the Insbridge user was created.

7. Update the permissions. The Insbridge user requires **Full Control**.

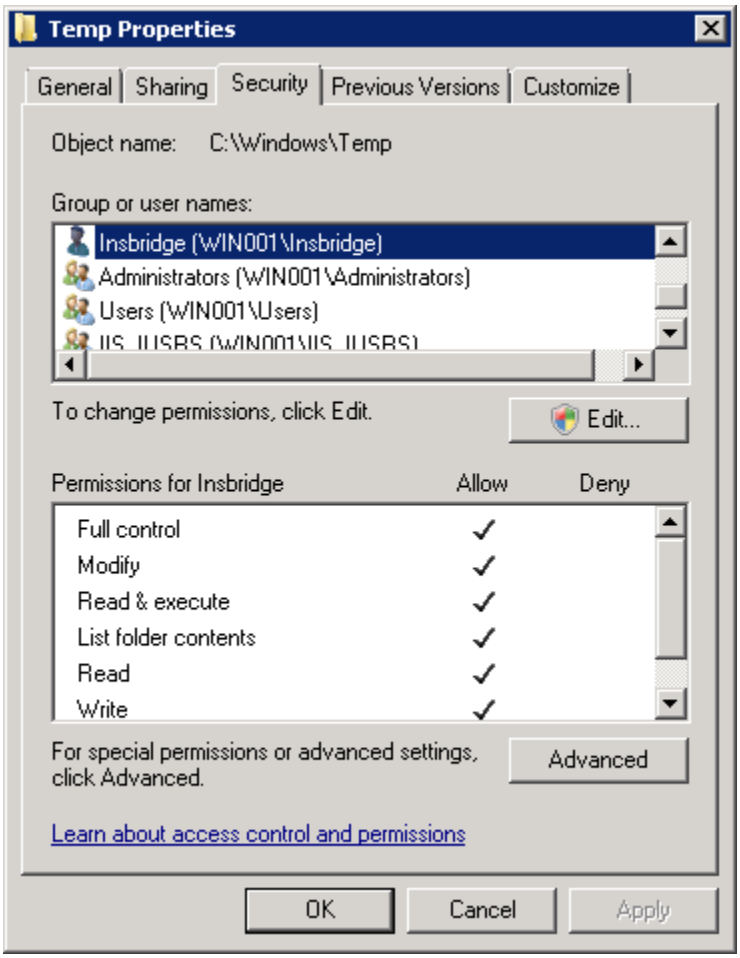


Figure 22 Temp File Properties

8. Click **OK** to close the Permissions for Temp screen.

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

STEP 5 – ASSIGNING PERMISSIONS – INSBRIDGE FOLDER

Assigning Permissions for an Insbridge Folder Location

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

2. Right click the **Insbridge** folder.

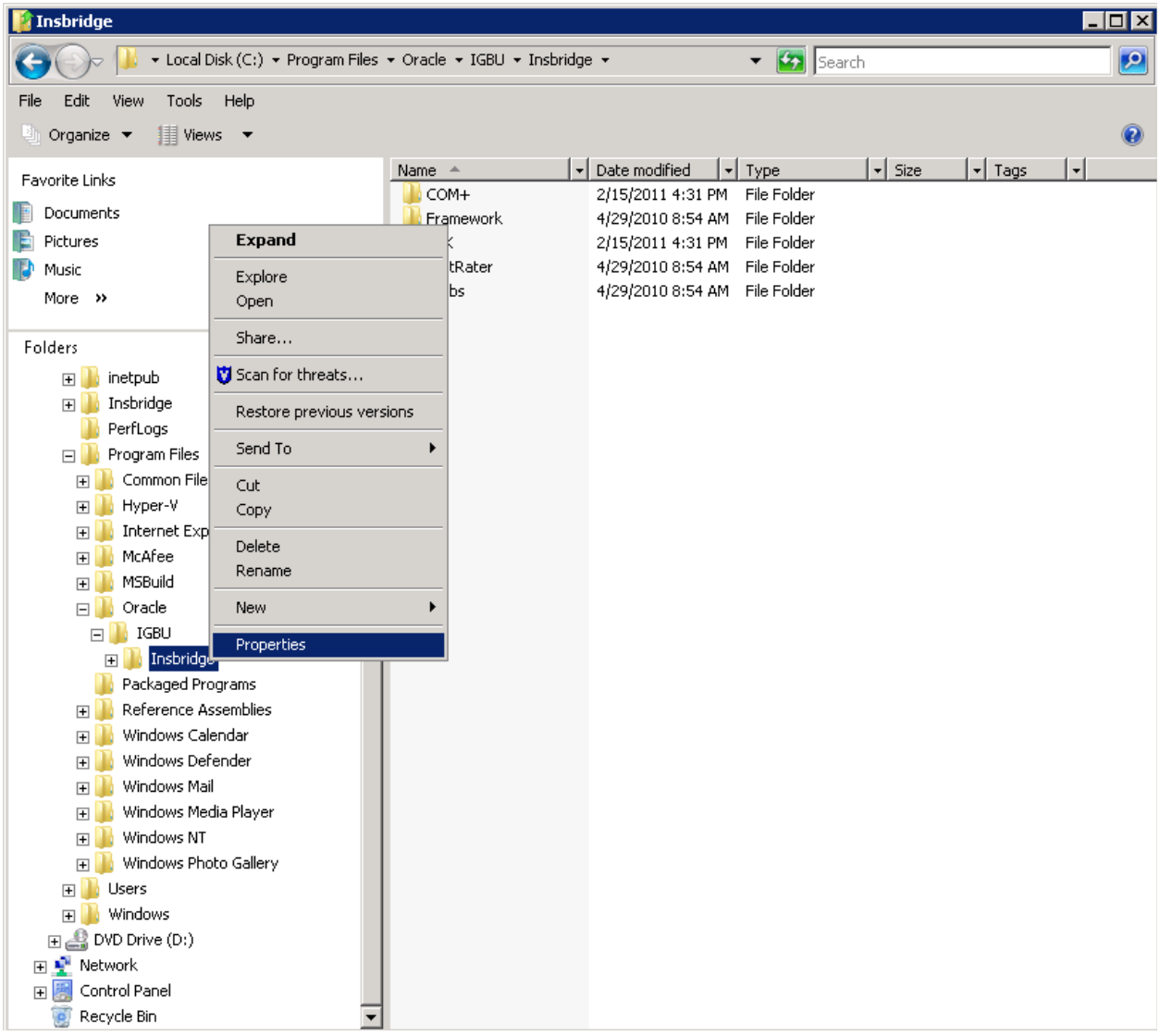


Figure 23 Assigning Permissions for the Insbridge User on Insbridge

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

4. Select the **Security** tab.

5. Click **Edit**.

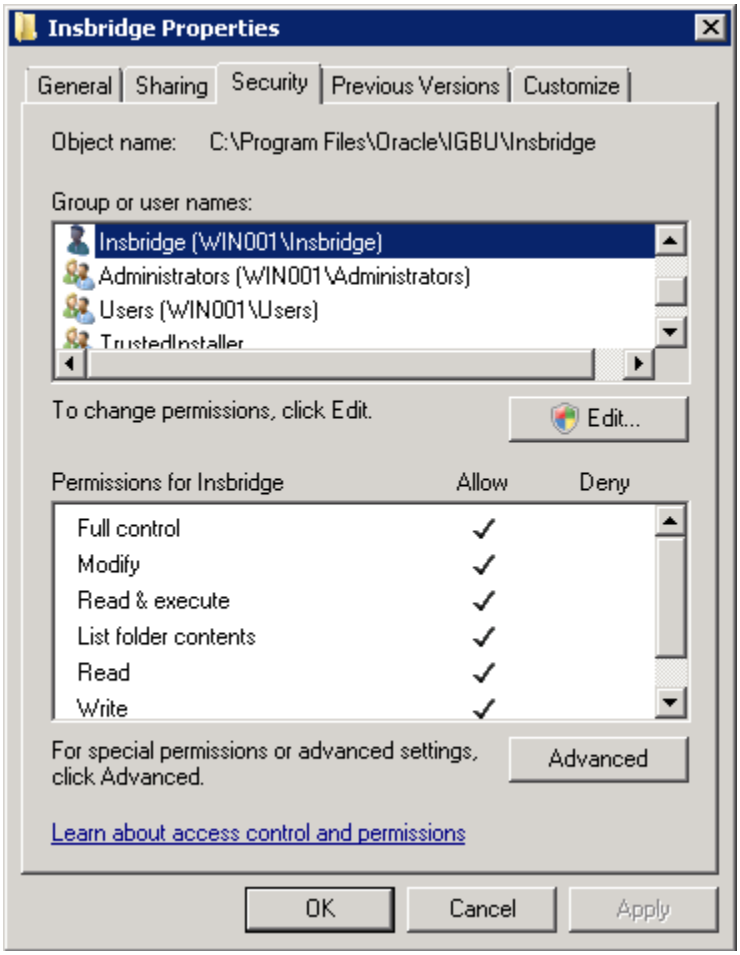


Figure 24 Insbridge Folder Properties

6. On the Permissions for INSBRIDGE screen, select the Insbridge user and click **Add**. If the Insbridge user is not found, cancel out and return to the Local Users and Groups area in Server Manager and verify the Insbridge user was created.

7. Update the permissions. The Insbridge user requires **Full Control**.

8. Click **OK** to close the Permissions for INSBRIDGE screen.

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

STEP 6 – RESTORING A SOFTRATER 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. 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\Insbridge\Databases. If you are unsure of a location, please consult with your database administrator.

4. **Rename the file**. It is not required but it is strongly suggested that the database file name be changed from TEMPLATE to something that defines the database more accurately. At a minimum, it is recommended that you remove "_TEMPLATE" from the name. You can change the names after they have been restored also.

5. **Open the SQL Server Management Studio** either on the server or remotely using either an administrative account with sa privileges or as the sa account.

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

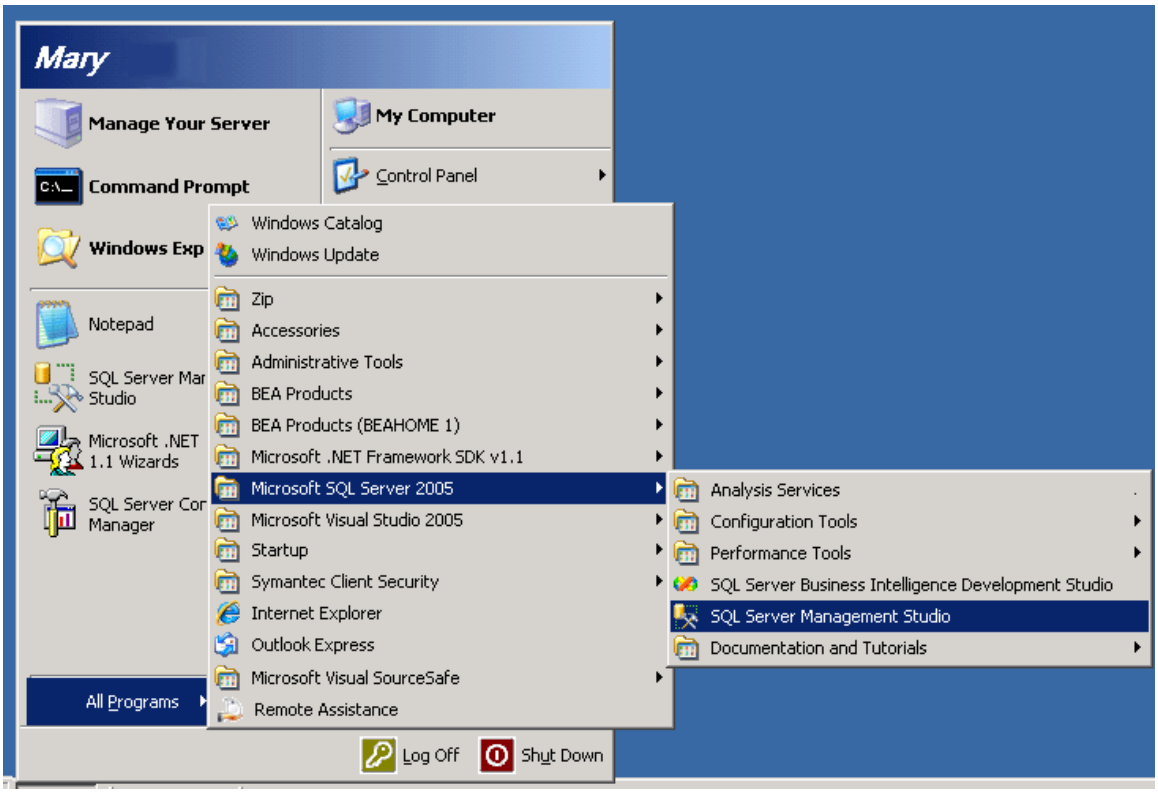


Figure 25 Restoring a Database to SQL Server

6. Go to **Databases**.

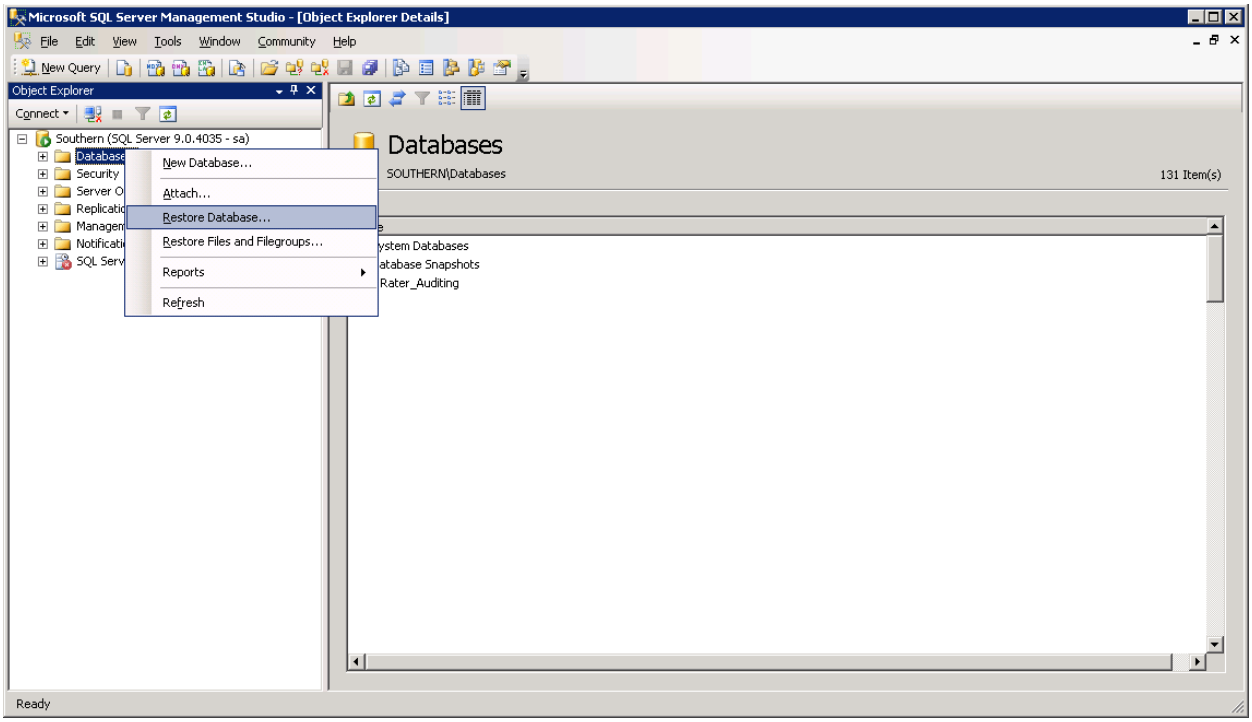


Figure 26 Right Click to Restore Database

7. Right click on **Databases**.

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

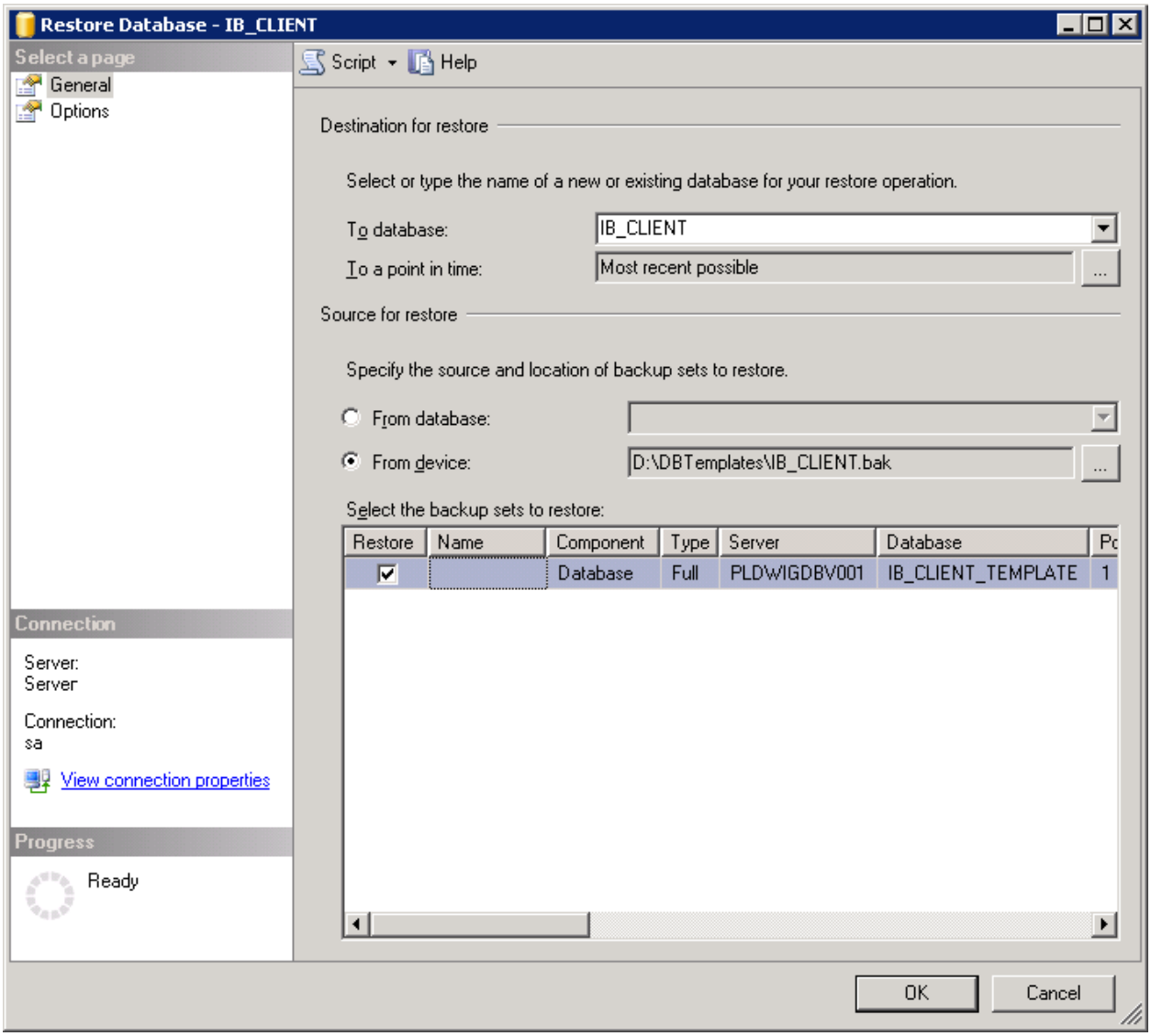


Figure 27 Restoring a Database

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

10. Select **From Device**. Click **…** to browse to the location where the database files were placed in step 2.

11. Select your database **IBSR_ *xxxx*.BAK**, where ***xxxx*** equals the renamed file from step 3.

12. Click **OK**. Your database will be populated.

13. Verify your information. Check the **Restore** box.

14. Click **OK**.

15. If the database was restored successfully, it will be displayed in the database folder. If not, please correct any errors and try again.

16. Once the database is restored to SQL Server, you will need to create or assign a SQL Server user account for the application. This user will be used for the connection to the databases when setting up the connections from the Insbridge Framework Administrator. Make note of the account you want to use. This information will be entered into the Insbridge Framework Administrator.

    For ease of administration, the database user should have **db_owner** permissions on the IBSR_xxxx database.

STEP 7 – CONFIGURING INSBRIDGE FRAMEWORK ADMINISTRATOR

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

http://SERVERNAME/IBFA

Logging in to IBFA

The default security setting for a new installation is Custom and requires a login to access.

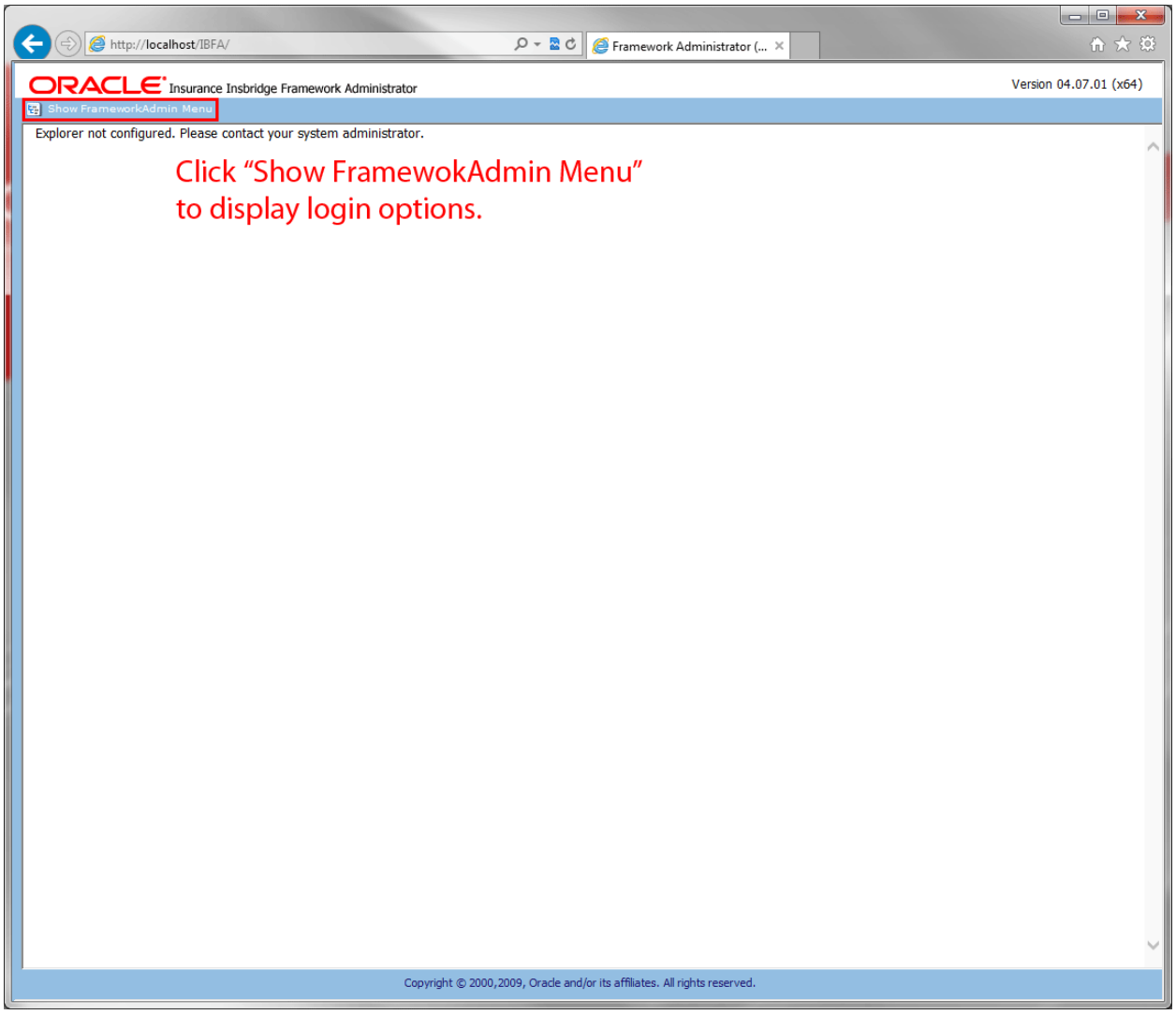


Figure 28 IBFA Landing Page

1. IBFA requires a login to access. Click the Show FrameworkAdmin Menu link to display the login.

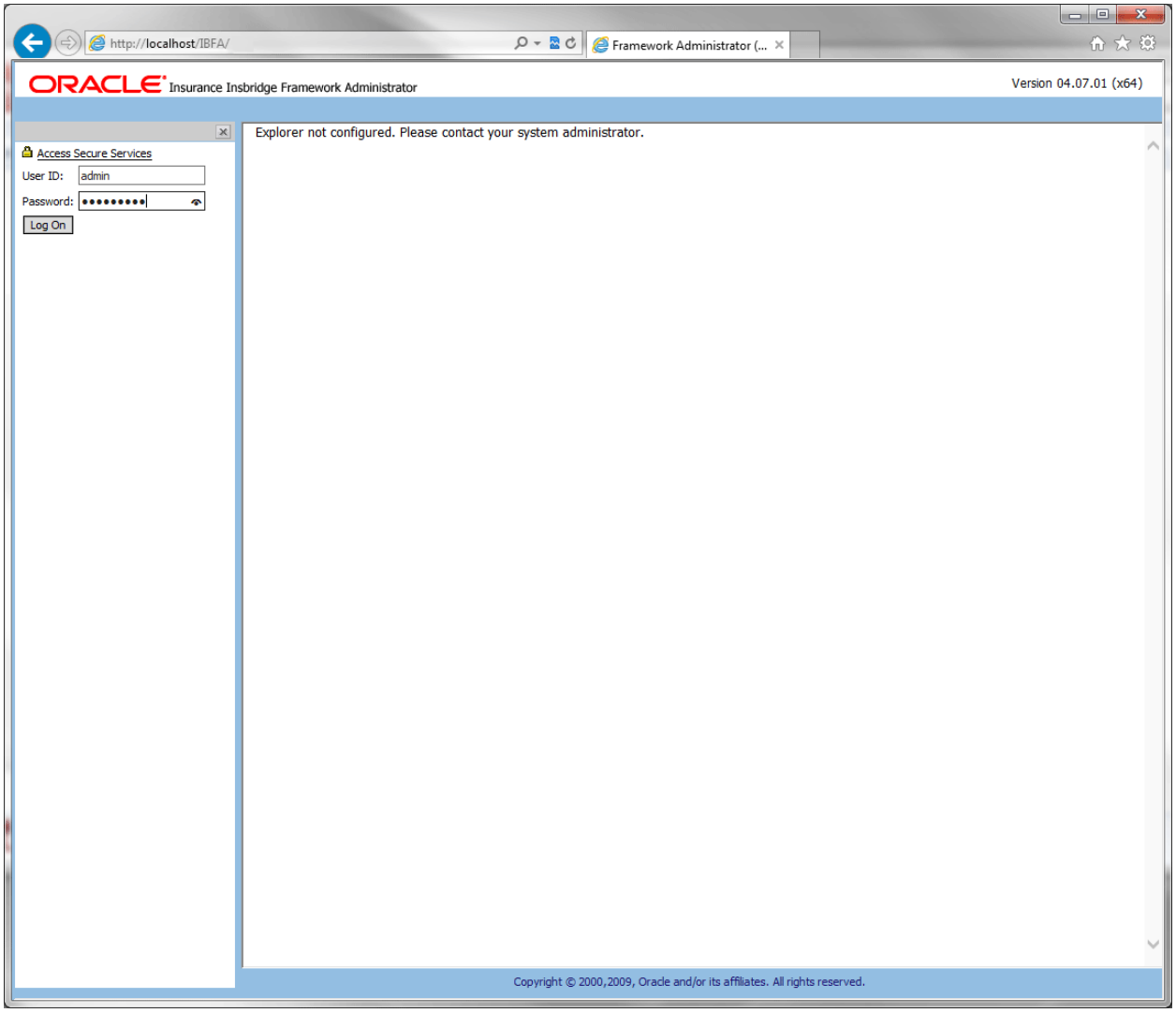


Figure 29 IBFA Login Screen

2. Enter the default User ID and password:

   User ID: admin
   Password: insbridge

3. The IBFA home page is displayed.

Updating IBFA Security

4. If you want to keep the custom security setting, it is recommended that you change the password immediately.

5. On the left side menu, select Security-> Change Password.

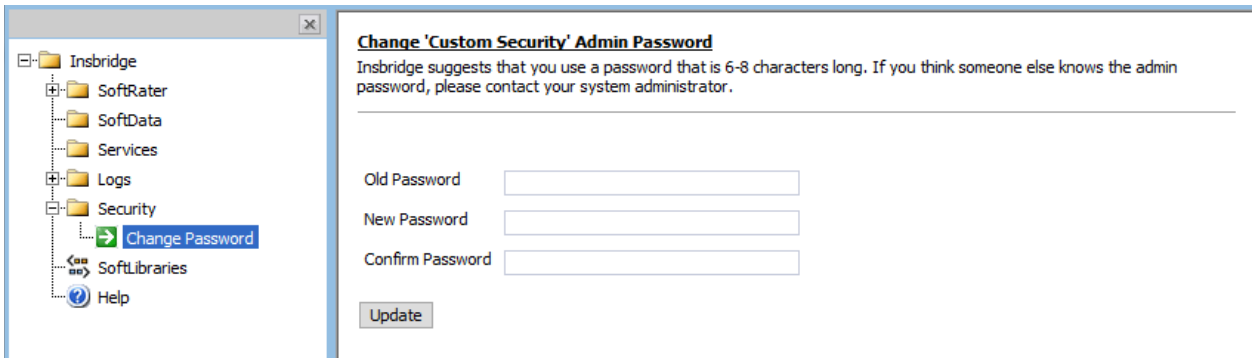


Figure 30 Updating the Default Password

6. Enter in the default password for the old password and enter in the new password of your choice. Confirm the new password and click Update. A success message is displayed when the admin password is updated. If an error message is displayed, make corrections and try again.

7. If you do not want to require a login, you can change the security to None. This changes the default landing page to the IBFA home page and removes any login requirements.

8. On the left side menu, select Security.

9. Select None for Framework Administration Web Security for no security. The landing page will be updated the IBFA home page and no login will be required.

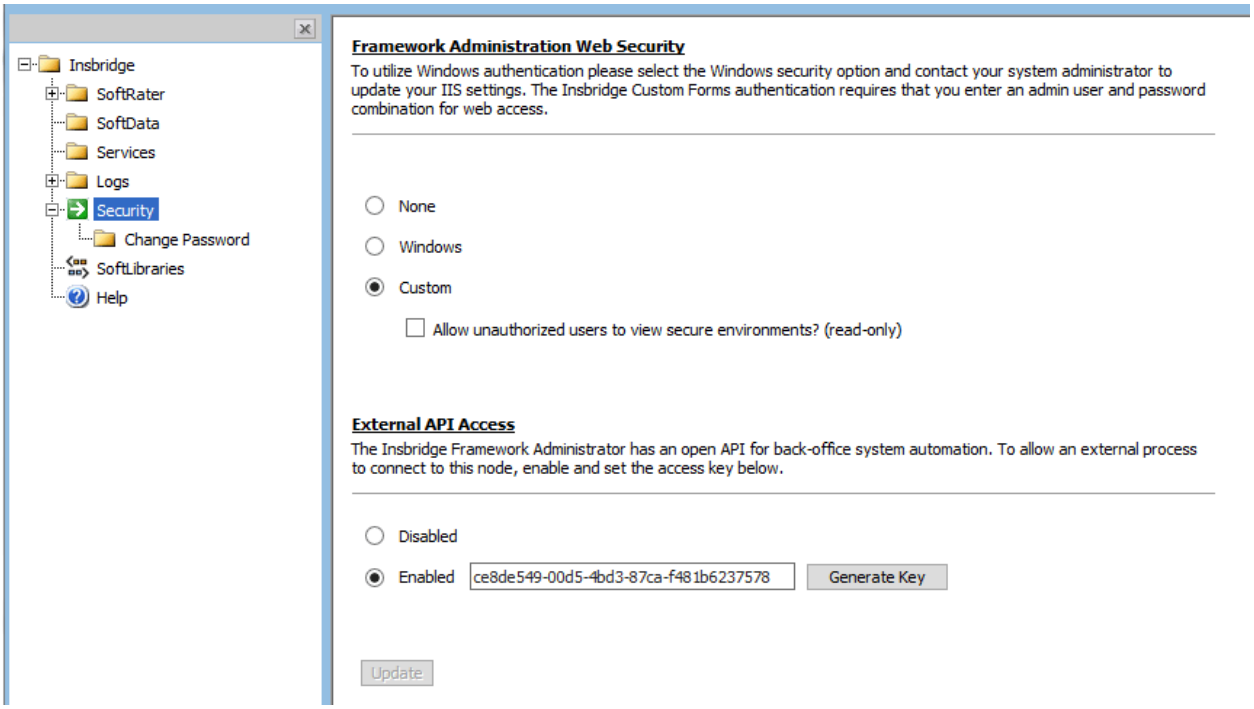


Figure 31 Selecting Security for IBFA

NOTE: *You also can select to use Windows security. Please see the IBFA user guide for more information on setting up Windows security.*

Entering Company Information

Configuring the Insbridge Framework Administrator for your company.

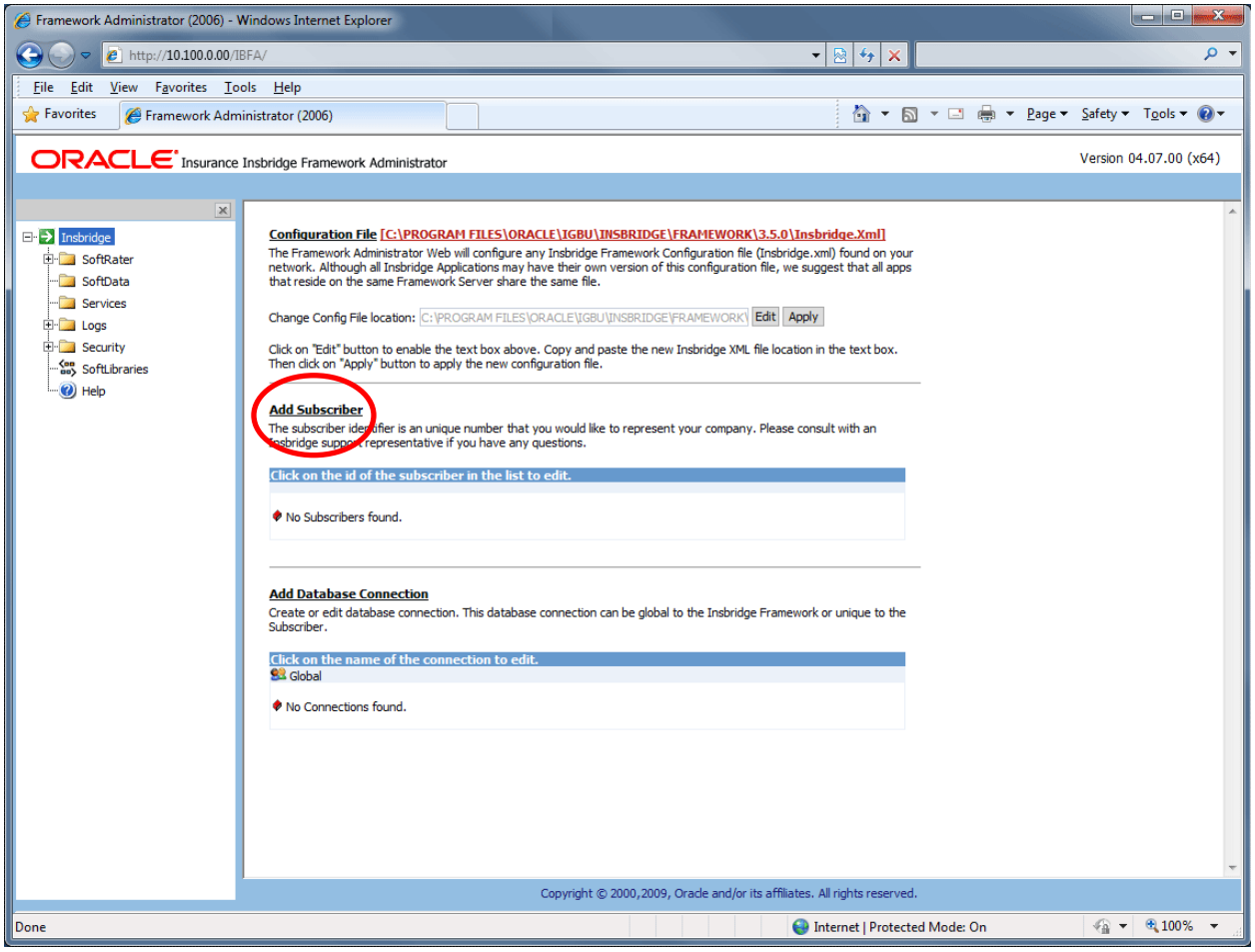


Figure 32 IBFA Home

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

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

NOTE: *If you receive an error regarding MCSiMenuCtl, please verify that you are using Internet 8.0 or 9.0 (32-bit). Release 04.07.01 does not support Internet Explorer 8.0 or 9.0 (64-bit).*

To continue, you will need to exact names of the databases you restored in Step 6, IBSR database.

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

- **Step 1 – Creating a Subscriber**

- **Step 2 – Creating a SoftRater Environment**
- **Step 3 – Creating a Virtual File Server**

Step 1 – Creating a Subscriber:

For this step you will need the subscriber information from the RateManager IBFA instance that you created previously. The subscriber created here must match that subscriber.

The ID and Name are fixed after the first time you save. These entries cannot be edited. Only the description can be edited. If you have made a mistake, you will have to create another subscriber and delete the incorrect entry.

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

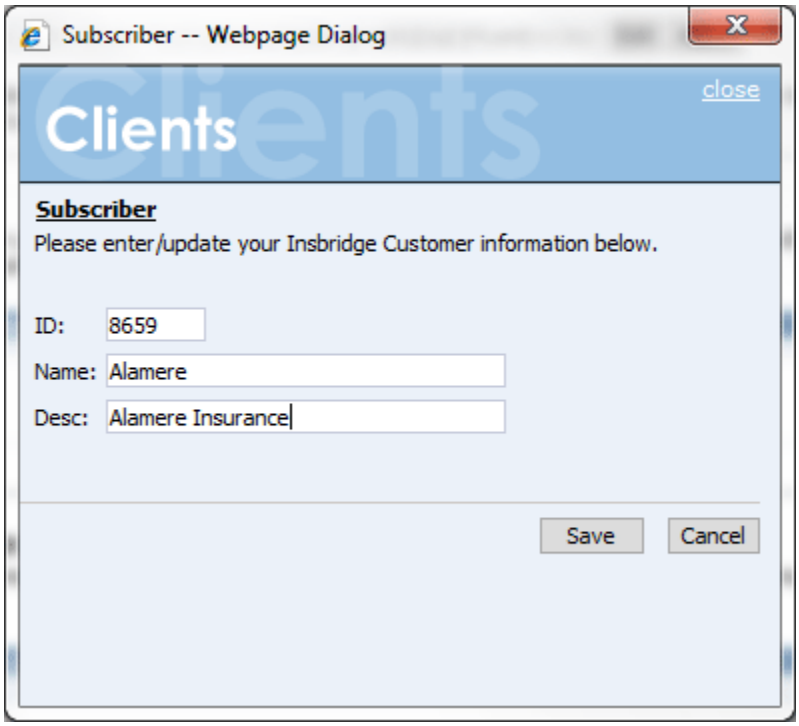


Figure 33 Enter ID

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

Troubleshooting Subscriber Entries:

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

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

Step 2 – Creating a SoftRater Environment:

Next, create the default rating environment for the SoftRater node.

It is recommended that you create one logical environment:

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

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

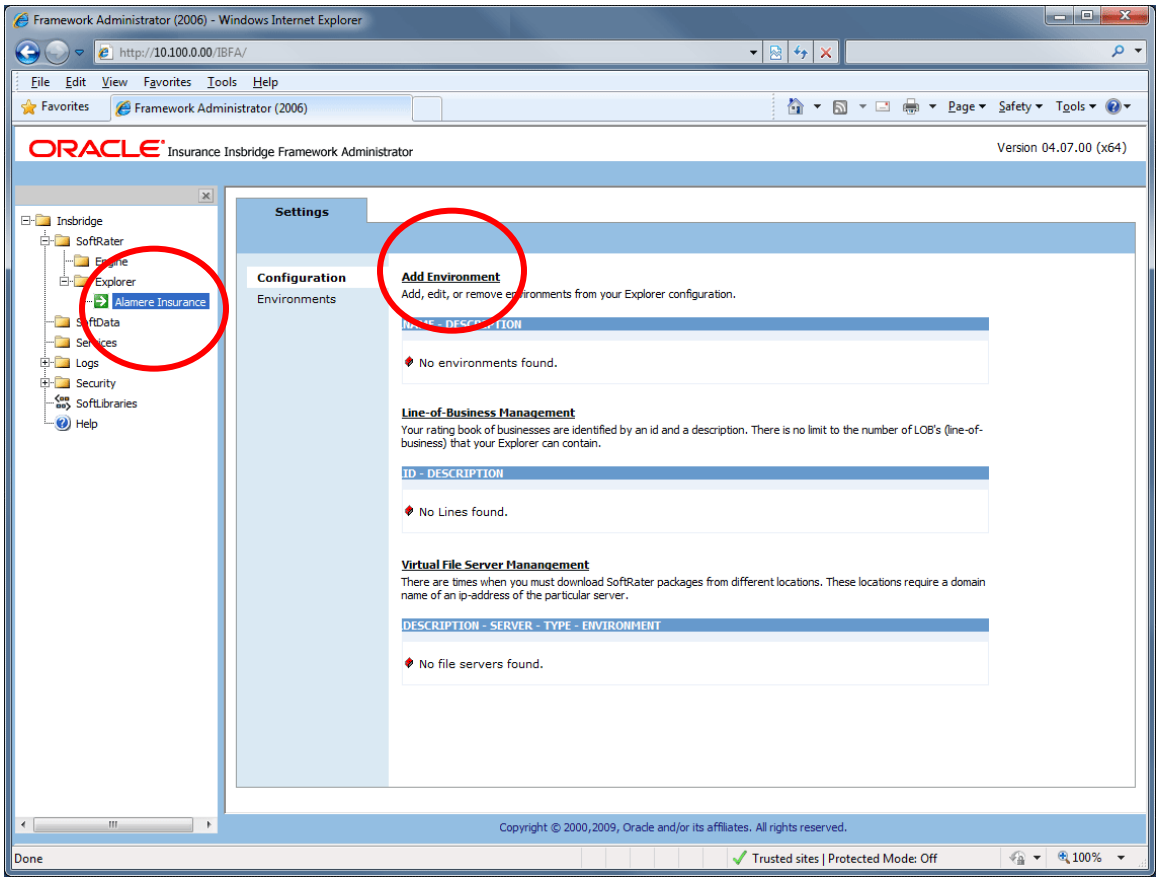


Figure 34 Create a Rating Environment

2. Click on **Add Environment**.

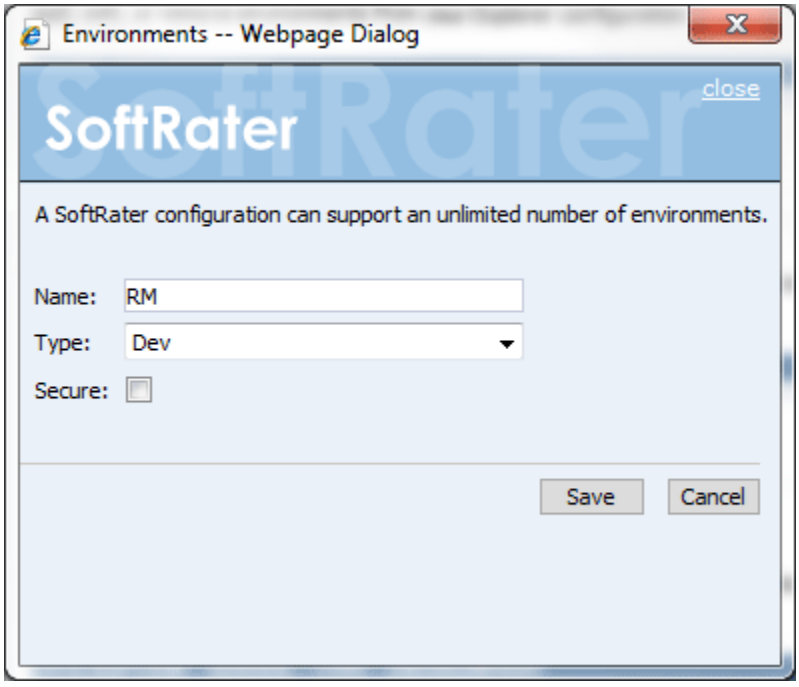


Figure 35 Entering Name and Environment

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

There are three types of Logical Environments:

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

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

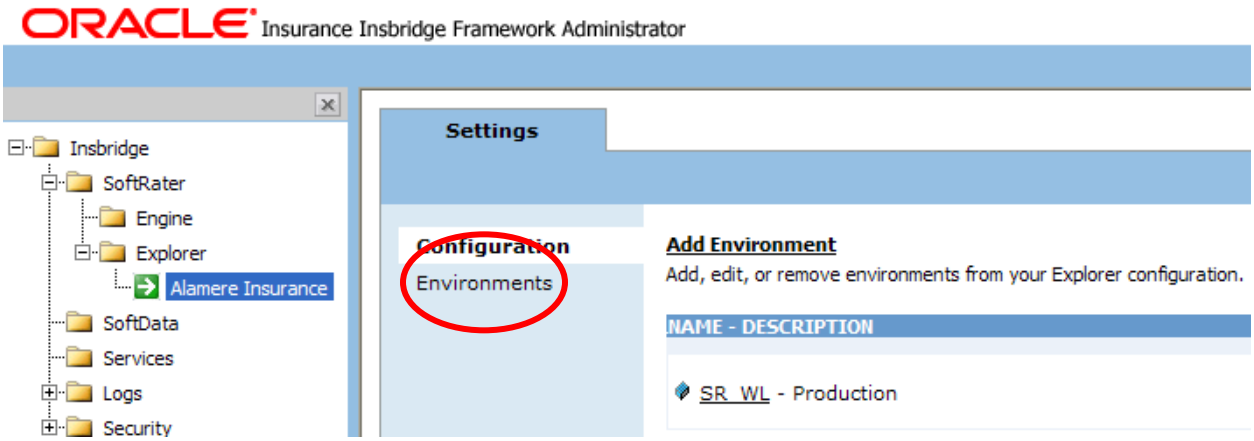


Figure 36 Obtaining Environment Information

4. Select the Environments link under the Config 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.

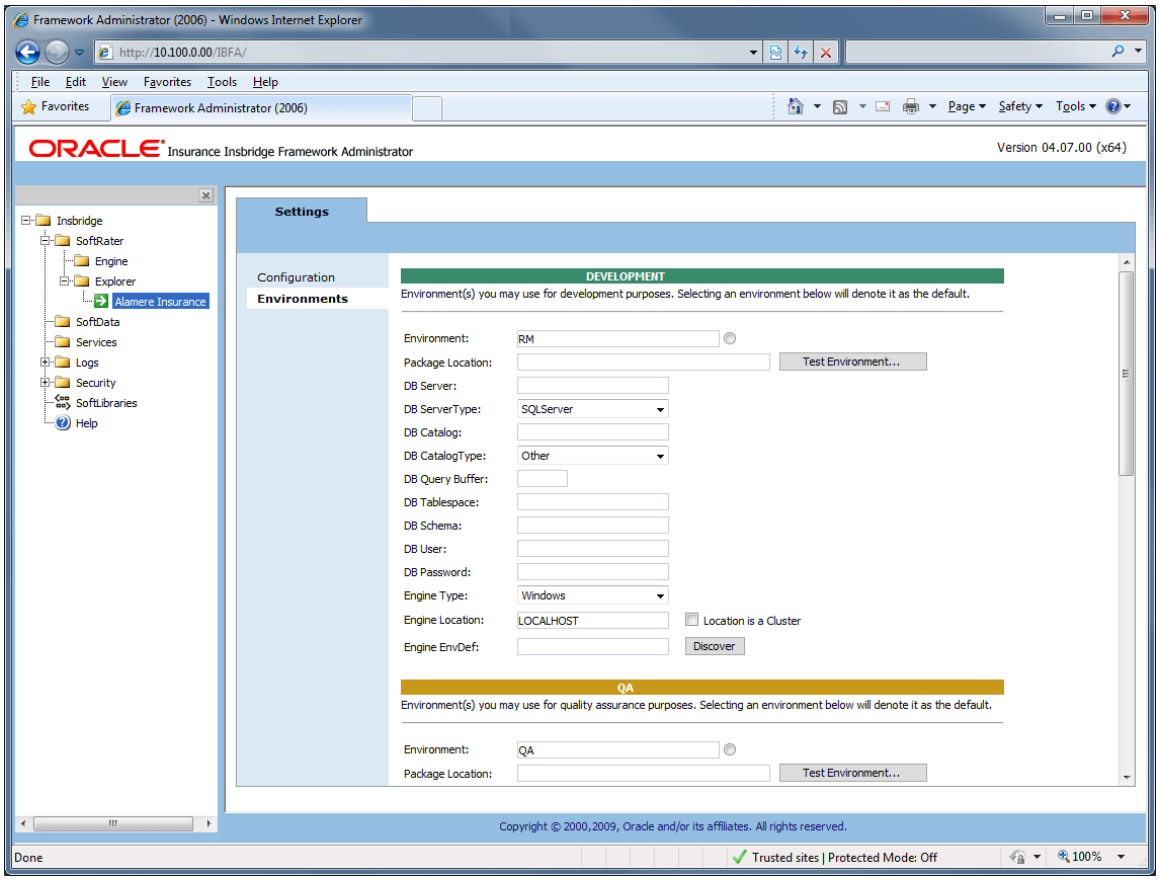


Figure 37 Editing Environment

Creating a SoftRater Environment

A SoftRater environment may be completed at installation or can be added at a later time. A SoftRater environment can only be on a Windows. There is no limit to the number of SoftRater environments that you can have.

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

2. 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.

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

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

5. The **DB Catalog** is the name of the SoftRater database restored in SQL Server.

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

7. **DB Query Buffer**, **DB Tablespace** and **DB Schema** are not required for a SoftRater for Windows (SoftRater Node) environment.

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

9. The **Engine Type** is **Windows**.

10. The **Engine Location** is the location of where you installed the SoftRater engine. You can use the machine name or IP address. Most SoftRater installations have a local engine location. If the engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located. Do not change LOCALHOST to the name or IP address of the local machine.

11. 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.

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

Step 3 – Adding a Virtual File Server

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

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

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

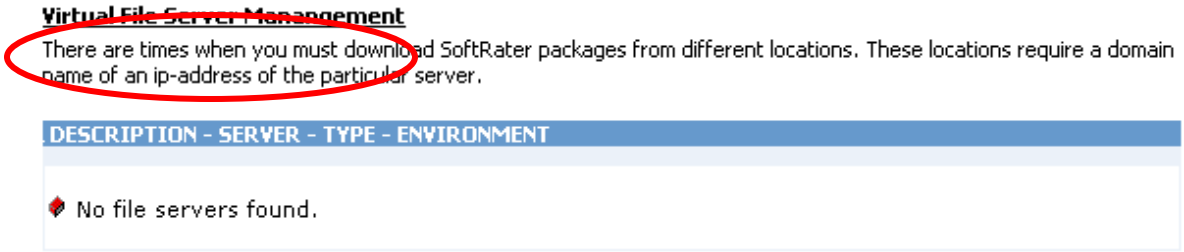


Figure 38 Virtual File Server Management Screen

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

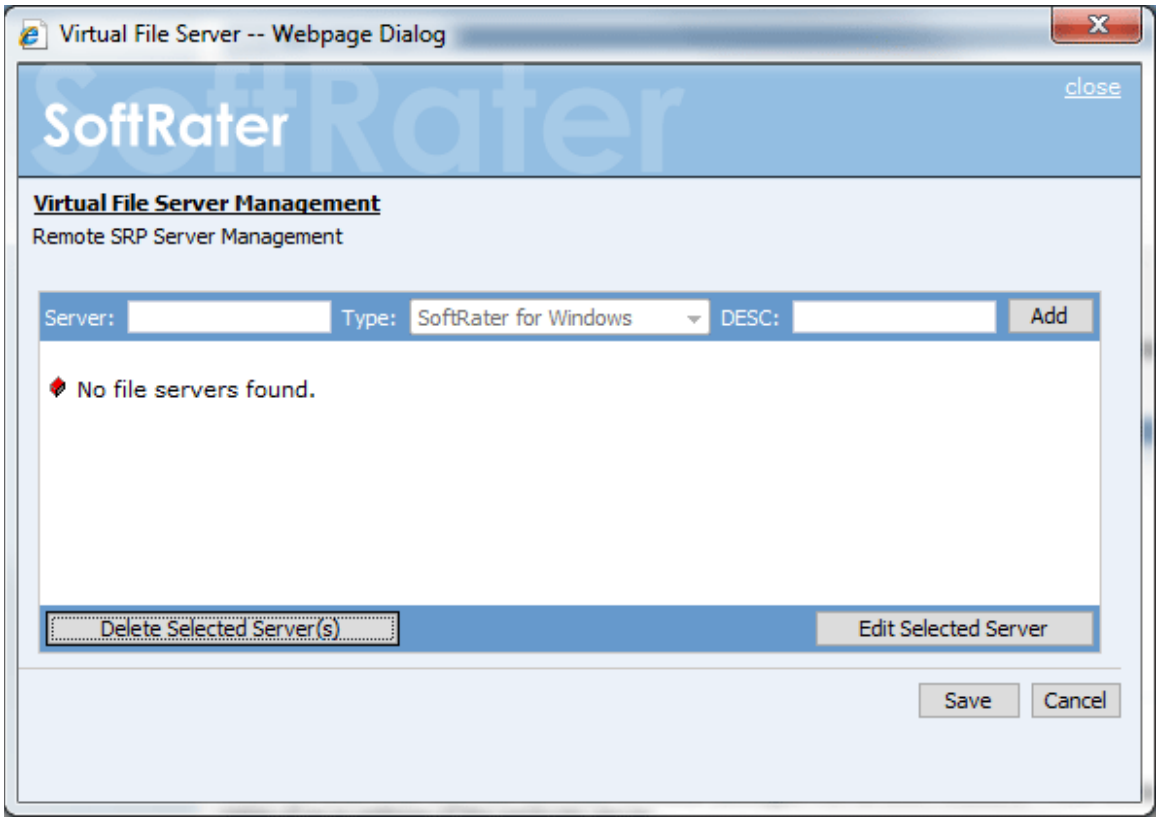


Figure 39 Virtual File Server Management Window

3. Enter the name of the server and a description. Take care when entering the server name. This field cannot be edited. If you have made a mistake, you must delete and re-enter.

4. Click Add to add the server to the list. Enter in as many servers as you need.

5. When you are finished, click **Save** to save your work and return to the previous screen.

STEP 8 – VERIFYING THE COMPONENT SERVICES

Next, you should verify the component services.

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

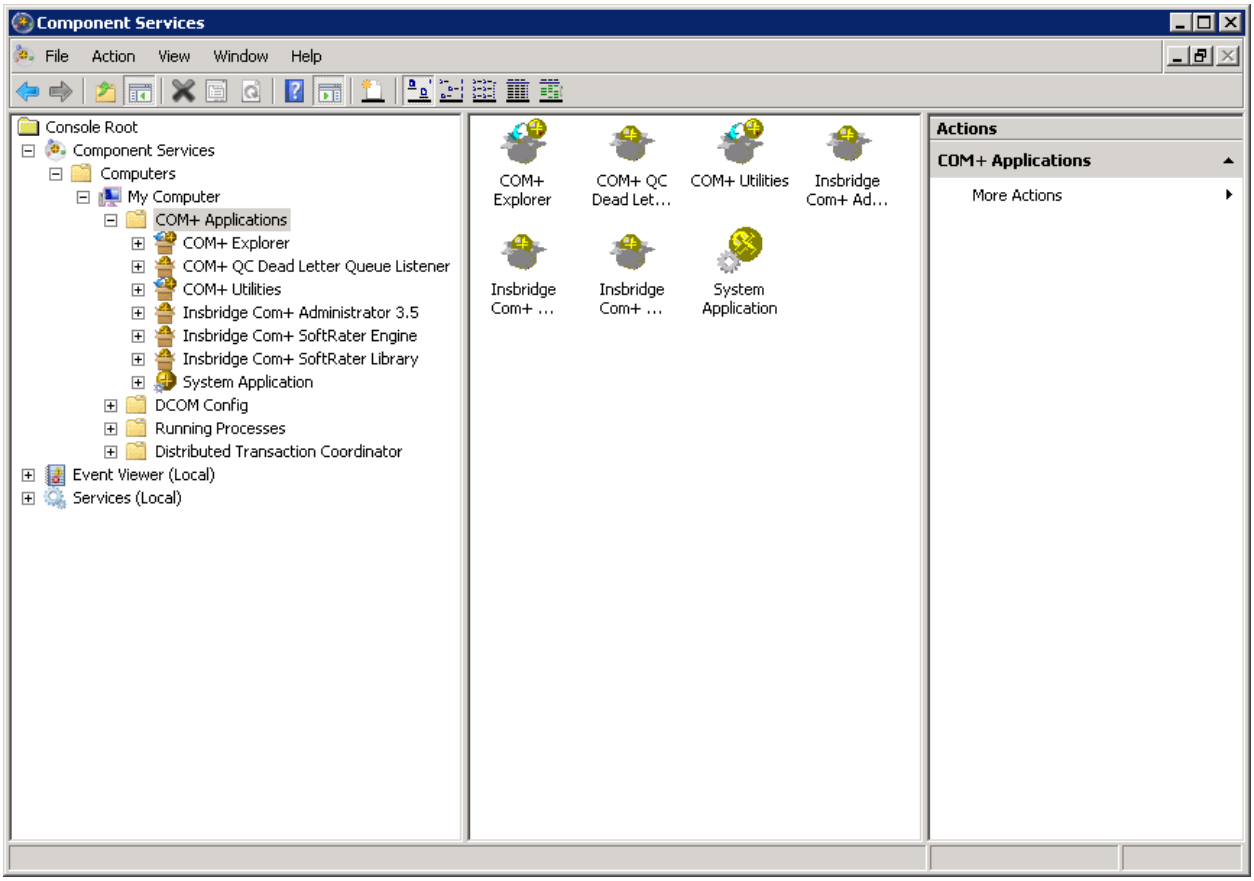


Figure 40 Component Services

There should be 3 Insbridge Com+ Applications libraries:

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

Verify the Identity of the Com+ Applications Libraries

Please note that you should not have to make any changes to any COM+ Application library. The installation will automatically apply the Insbridge user name and password that you created earlier to the necessary libraries.

1. Select the Insbridge Com+ Administrator 3.5.
2. Right click and select Properties.
3. Select the Identity tab.
4. Verify that the User is Insbridge. If the user is System Account or is not set to the Insbridge user, change to the Insbridge user set up earlier.

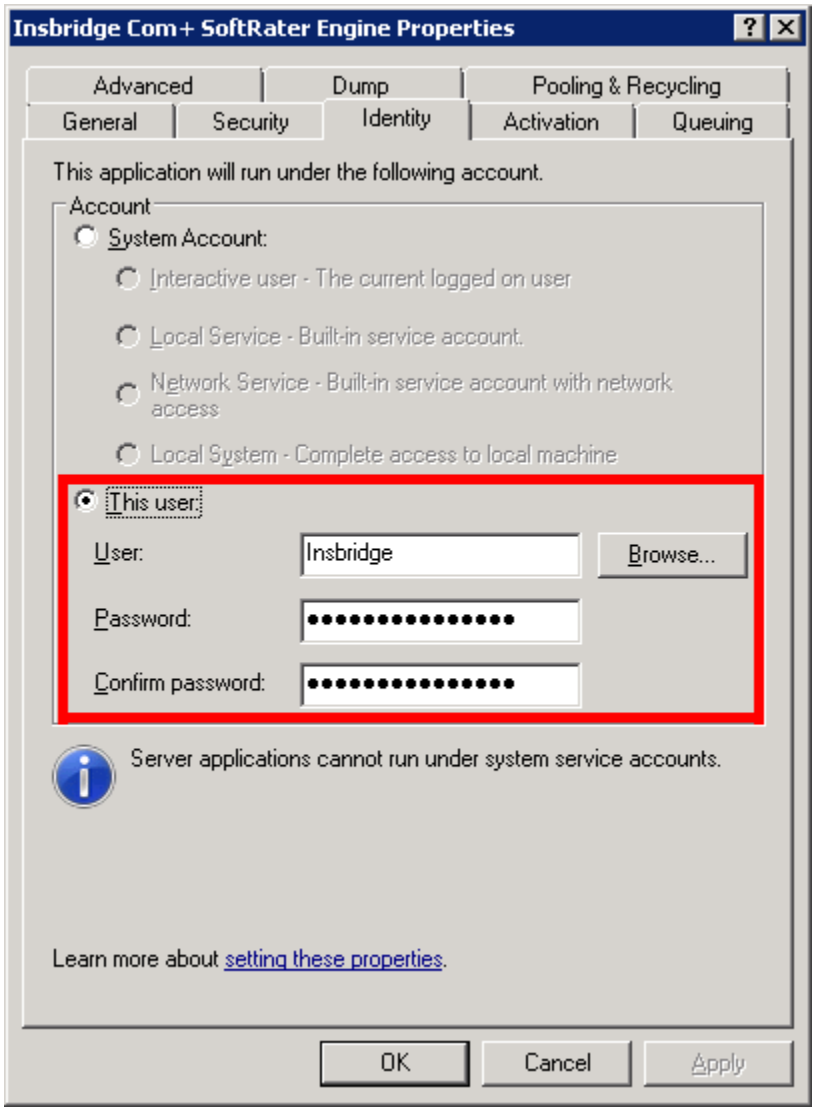


Figure 41 Updating Com Plus to the Insbridge User

5. Repeat for the other com+ services.

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

Please note that you should not have to make any changes to any COM+ Application library. The installation will automatically apply the Insbridge user name and password that you created earlier to the necessary libraries. If you change the password, you will have to change the password in all three of the Insbridge Com+ libraries. On each library, right click, select Properties, select the Identity tab, enter in the new password.

STEP 9 – ALLOWING FOR WCF ACTIVATION

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

1. Select Start→Administrative Tools→Server Manager.

2. Select Features Summary. Scroll through the list to verify WCF Activation has been activated.

3. If not, select Add Features. The Add Features Wizard will be displayed.

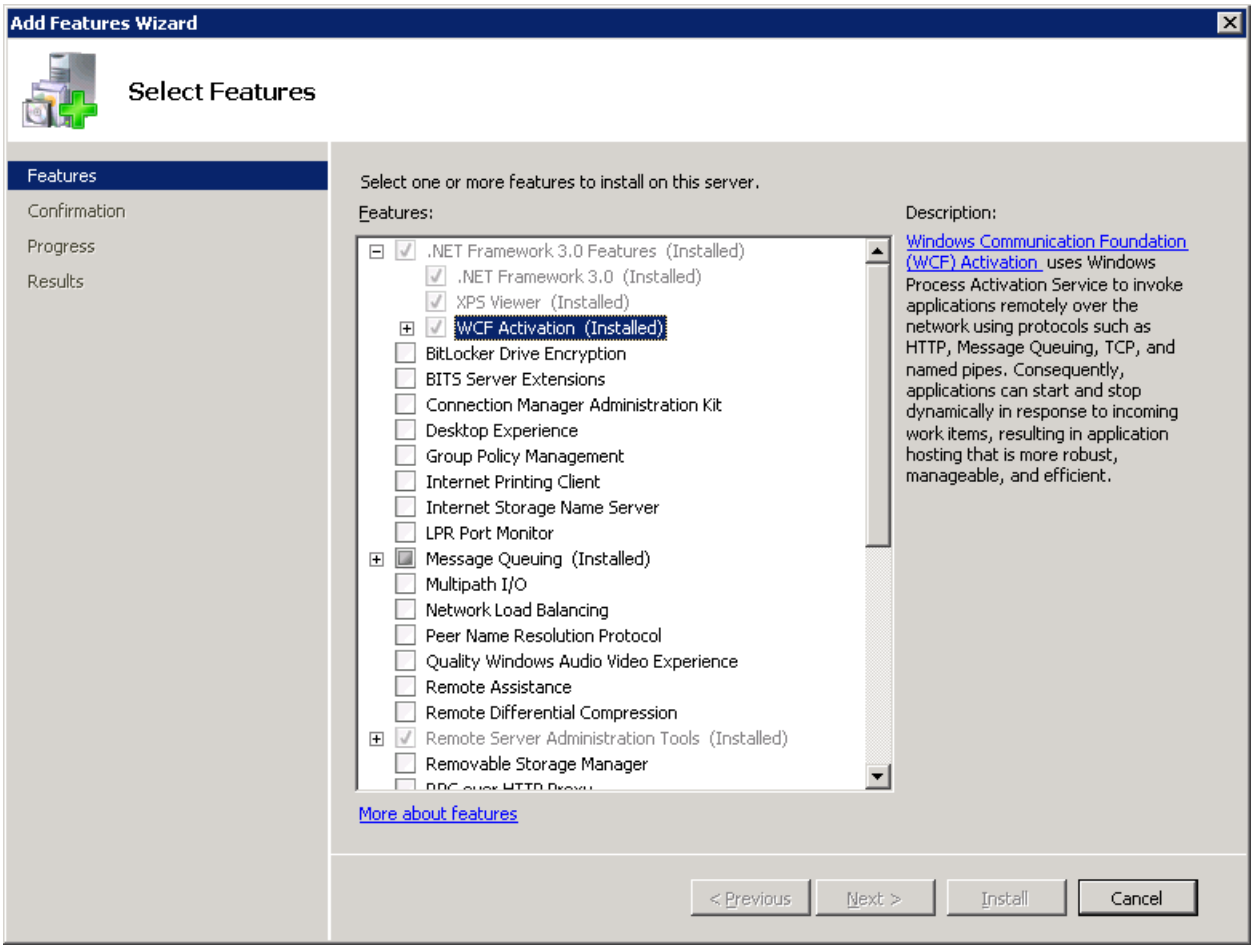


Figure 42 Selecting WCF Activation

4. Select WCF Activation. Click NEXT.

5. Confirm your selection and click INSTALL. The installation will proceed.

6. You can close out when complete.

STEP 10 – INSTALLING THE OBI PUBLISHER

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

1. Unzip the OBI_PUBLISHER

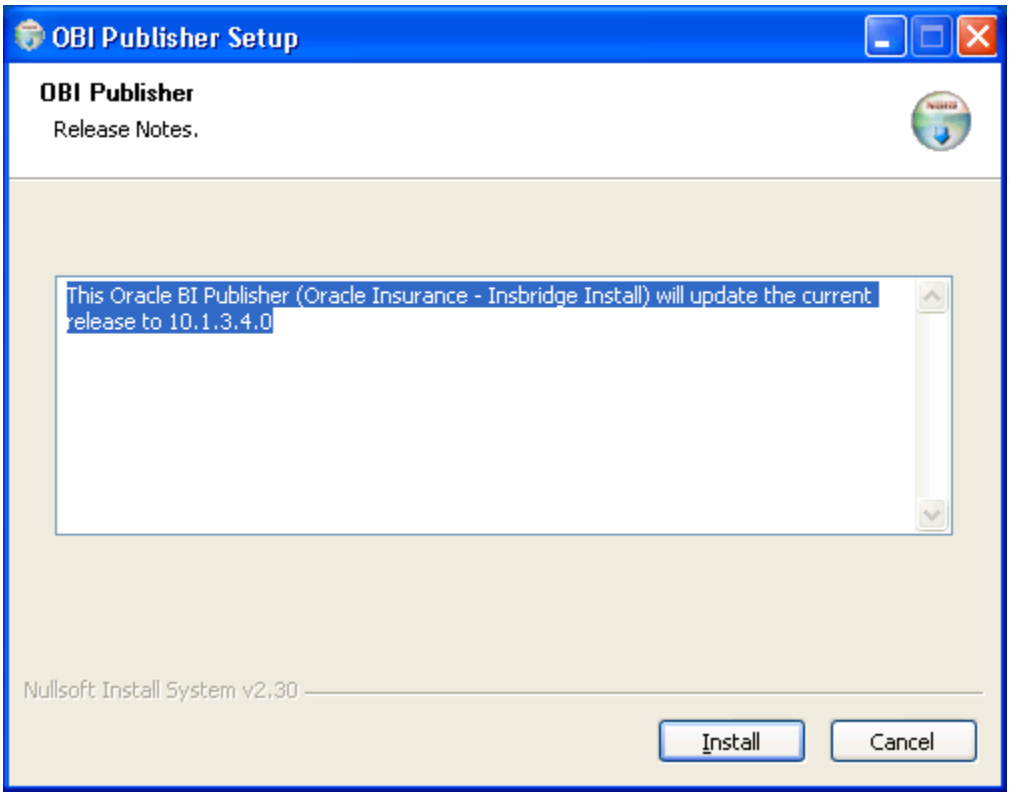


Figure 43 Installing OBI Publisher

2. Click **Install**. A progress screen will be displayed.

3. When complete, click **Close**.

4. In order for OBI Publisher to be available to users, you must start the **Insbridge Message Service**. The Insbridge Message Service can be started from IBFA or from the Server Manager in Windows 2008.

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

OBI Security

The OBI Publisher requires a default User ID and password to be entered in IBFA. OBI is required to create certain reports in RateManager. Users will receive error messages if the OBI Publisher Credentials are not completed.

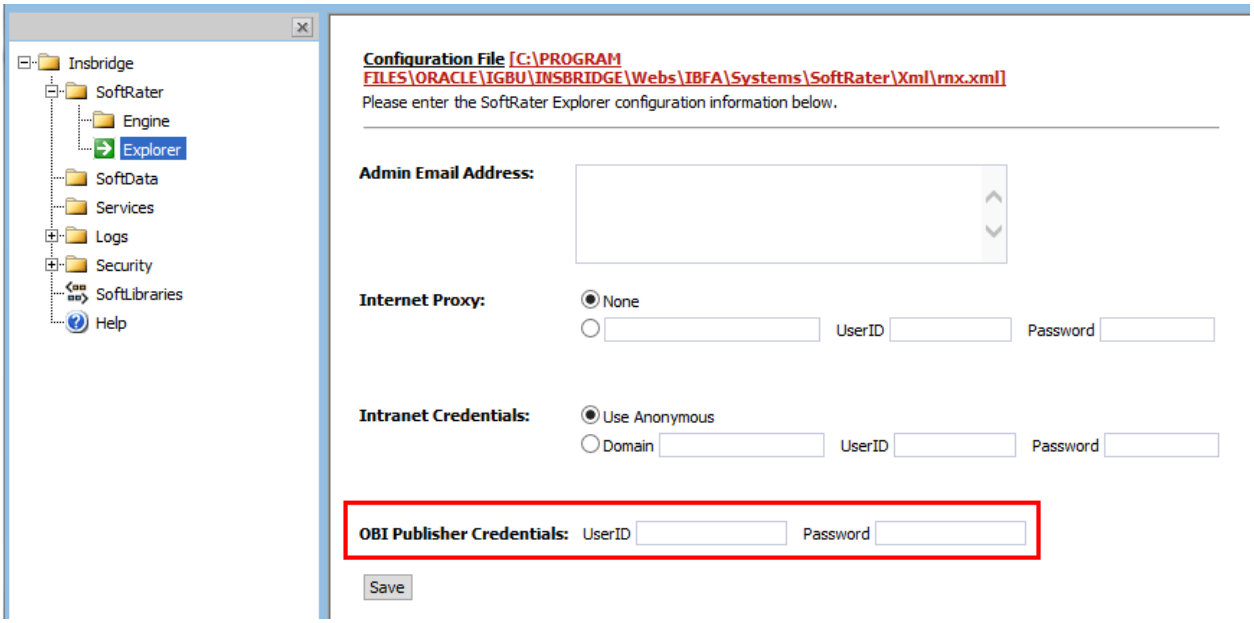


Figure 44 OBI Publisher Credentials

1. On the left side menu, select SoftRater-> Explorer.
2. Locate the OBI Publisher Credentials.
3. Enter the default user name and password.

   User ID: Administrator
   Password: Administrator

4. Click Save to save your entry. You must click Save prior to exiting the page.

Updating OBI Publisher Password

You can immediately update the OBI Publisher password if you want. The password must be updated in OBI Publisher and then in IBFA.

1. Enter the OBI Publisher console. http://localhost:9074/xmlpserver where localhost is the machine where IBFA/RM is installed.

2. Select the Admin tab.

3. Under Security Center, select Users.

4. Select the administrator Username.

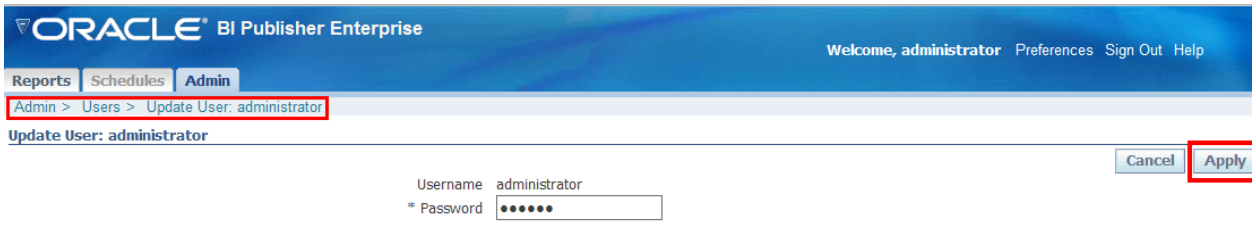


Figure 45 Updating the OBI Publisher Password

5. Enter in a new password and click Apply. This updates the Administrators password.

6. Sign out of OBI Publisher.

7. Enter IBFA.

8. Open the SoftRater Explorer Configuration window. Enter the same password in the OBI Publisher Credentials.

9. Click Save. The password has been updated.

NOTE: ***New for Release 4.7.1.*** *A login screen is displayed on IBFA for new installs. An upgrade will not reset the current security setting. For example, if a login was not required for IBFA, upgrading to release 04.07.01 will not change that. Please see the Insbridge Upgrade Guide for more information.*

STEP 11 – STARTING INSBRIDGE SERVICES

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

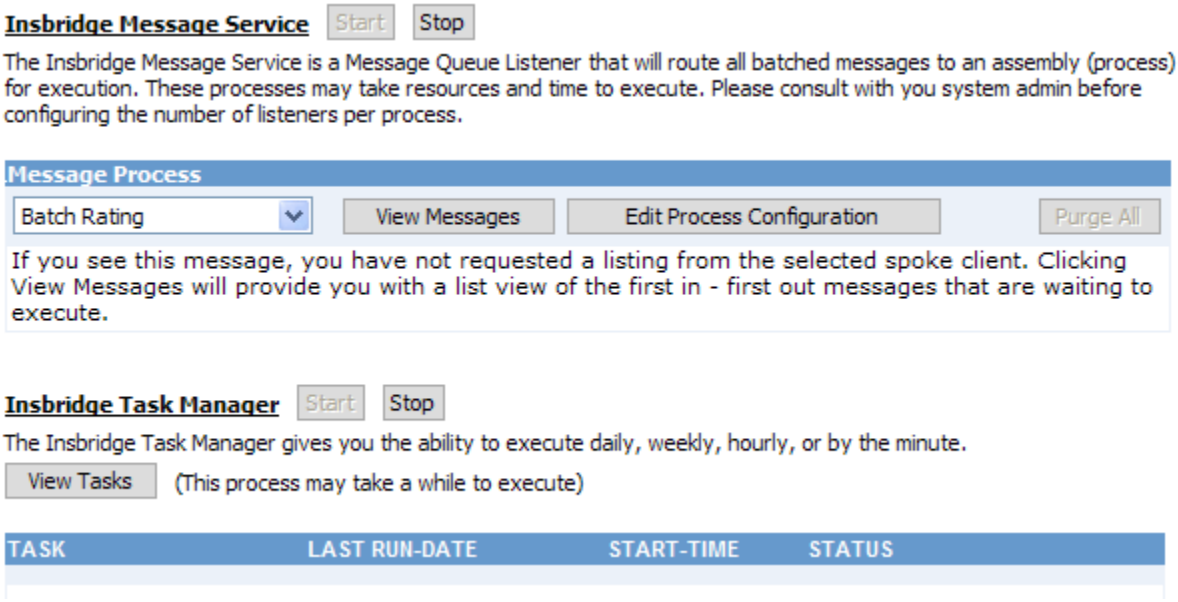


Figure 46 Insbridge Services Screen

1. In **IBFA**, navigate to the **Services** page.

2. Next to Insbridge Message Service, click **Start**. After a few seconds, the buttons will refresh to indicate that the service is started.

3. Next to Insbridge Task Manager, click **Start**. After a few seconds, the buttons will refresh to indicate that the service is started.

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

STEP 12 – IMPORT INSBRIDGE REGISTRY KEY

The registry key from the RateManager/IBFA instance must be imported into the machine where the SoftRater for Windows is located. This will allow packages to be loaded and rated.

On the RateManager/IBFA Machine:

The Insbridge registry key located in HKEY_LOCAL_MACHINE→SOFTWARE→Insbridge is used to store all information for proper encryption of the SoftRater Packages (SRPs). This registry key should be exported to a text file and then imported into the SoftRater for Windows machine.

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

On the SoftRater for Windows Machine:

1. Place the file you exported anywhere on the machine.
2. Click the file to start the import.
3. If the import fails, please correct any errors and try again.

STEP 13 – CONNECTING SR-WIN TO THE IBFA

The new instance of SoftRater for Windows will now need to be connected to the original installation of RateManager/IBFA. This will allow packages and SRPs to be loaded and unloaded from development to QA or Production environments.

Open an Internet Explorer web browser and browse to the location of the original RateManager/IBFA.

http://SERVERNAME/ibfa/

Creating Environments

Next, you will need to create the same rating environment of the SoftRater for Windows.

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

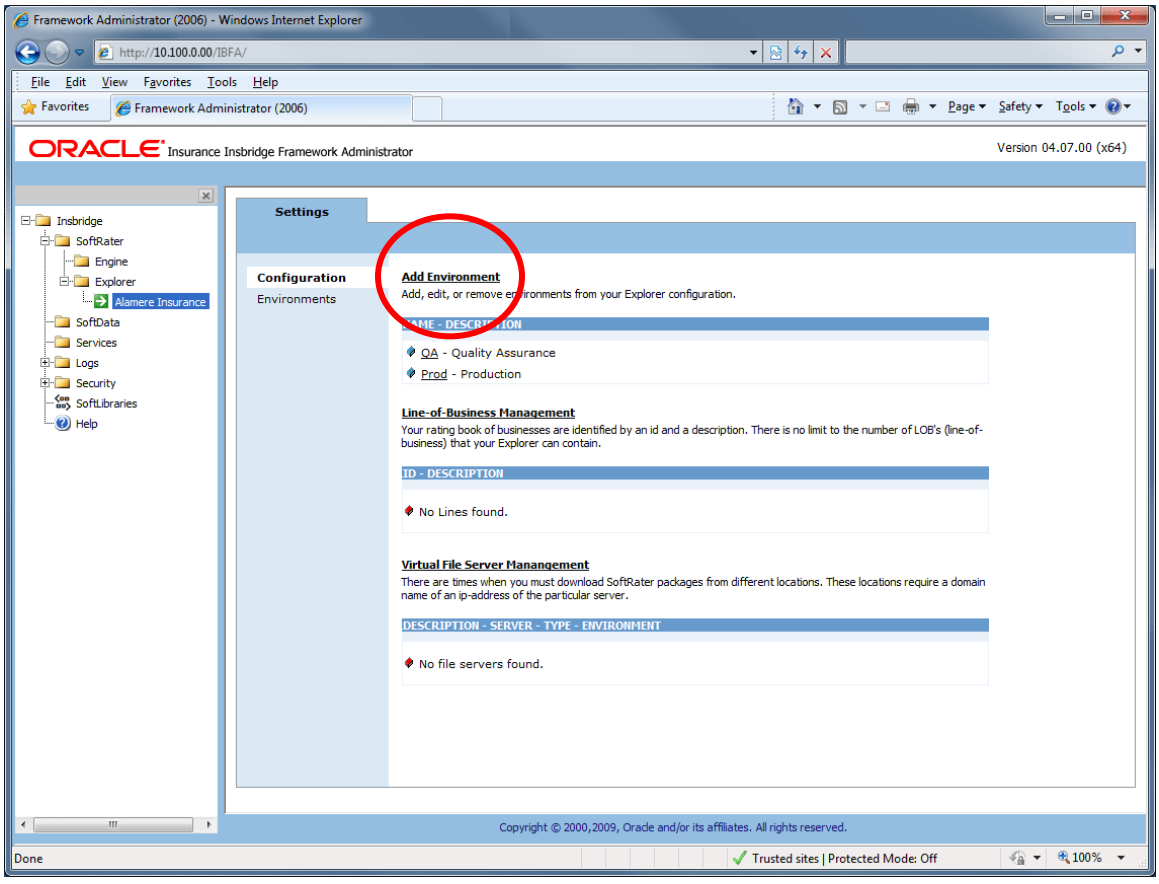


Figure 47 Create a Rating Environment

2. Click on **Add Environment**.

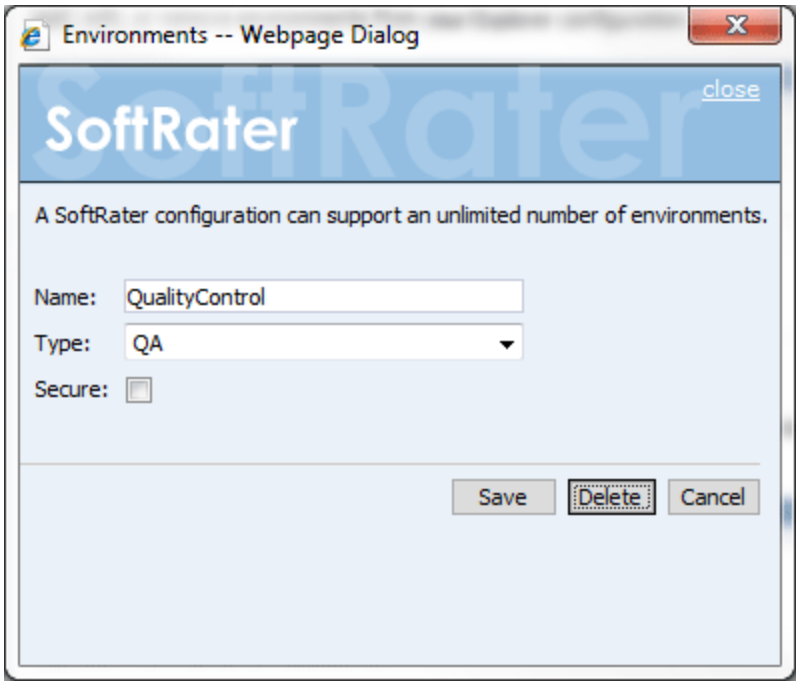


Figure 48 Entering Name and Environment

3. Enter the same Name and Type as the SoftRater for Windows instance.

4. After you have entered your logical environment, you must define it. Select the Environments link under the Config 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.

5. Enter the exact same information as the SoftRater for Windows.

6. Click **Save** to save your information.

You can test connections and verify that you can load and unload packages.

Chapter 4

SOFTRATER DATABASE REQUIREMENTS

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.

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 the required permissions.

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

Recommended SoftRater for Windows 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 SQL Server.

- **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.

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

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

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

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

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

- **Server Authentication:** Should be set to SQL Server and Windows Authentication mode.
- **Collation and Sort Order:** Currently supported is the default SQL Server collation using SQL_Latin1_General_CP1_CI_AS and sort order plus case sensitivity using Latin1_General_BIN as the server collation. The security database (IB_CLIENT) supports the default SQL Server collation using SQL_Latin1_General_CP1_CI_AS. The RateManager and SoftRater databases can use either case sensitive or non-case sensitive. Please check with Oracle Insurance for any questions regarding database server sort orders or collations.

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

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

CONTACTING SUPPORT

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

Address any additional inquiries to:

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

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

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