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Oracle Insurance

Insbridge Enterprise Rating

RateManager Installation Guide

Release 4.8

August 2014

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Oracle Insurance Insbridge Enterprise Rating Installation Guide

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PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating Installation Guide*. The Insbridge Enterprise Rating (IBER) System is a browser-based, multiplatform insurance rating and underwriting technology solution that provides integrated management for every aspect of the rate definition and modification process. This guide assists with the installation of the Insbridge Enterprise Rating System.

AUDIENCE

This guide is intended for system administrators, installers, database administrators and others tasked with installing and configuring the IBER system and associated databases.

PLANNING YOUR IBER 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 Enterprise Rating system (IBER) is expandable and can accommodate a few different configurations.

For more on planning your IBER 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.

- **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** – Upgrades existing customers from their current version of IBER up to version 04.08.00.

This guide is for a RateManager installation.

Definitions

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

- **IBER:** Insbridge Enterprise Rating 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 IBER 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 IBER 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 Enterprise Rating Operating Environments for Hardware and Software.
- You can view this guide on-line at this address:

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

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	P01-701-15	R 4.0	April 2010	Update for 32 bit
2nd Edition	P01-701-16	R 4.0.1	August 2010	Update Release
3rd Edition	P01-701-17	R 4.1	December 2010	Update
4th Edition	P01-701-18	R 4.5	May 2011	Update
5th Edition	P01-701-19	R 4.5.1	September 2011	Update
6th Edition	P01-701-20	R 4.6	May 2012	Update
7th Edition	P01-701-21	R 4.6.1	November 2012	Update Release
8th Edition	P01-701-22	R 4.7	September 2013	Update Release
9th Edition	P01-701-23	R 4.7.1	November 2013	Update Release
10th Edition	P01-701-24	R 4.8	August 2014	Update Release

Chapter 1

SYSTEM REQUIREMENTS

IBER installers should be familiar with managing a Windows server. There are two download options for the IBER install, 32-bit or 64-bit. Please be sure you have downloaded the correct installation files 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**

Oracle Software Delivery Cloud

Prior to installation, please make sure the source machine(s) where IBER 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 IBER 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 Support.

The installation downloads you can select are:

- **Insbridge IBER Install:** Required for all RateManager installations. There are two options for the IBER install, 32-bit or 64-bit. Please be sure you have downloaded the correct install for your machine.
- **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 04.08.00-Insbridge-IBER 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
      - Update: usp_IBSR_v04.08.00.00.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 Enterprise Rating.exe**

You are required to run the installation file and create the IB_CLIENT database for any new installation. The other folders and files may not be needed, depending upon the kind of setup you want. Everything for a Windows only installation is in the **04.08.00-Insbridge-IBER** folder. If you want to incorporate a Java environment, please download the corresponding SoftRater file. SoftRater downloads are not required if you are running in Windows only.

RATEMANAGER INSTALLATION

Installing RateManager requires that you:

1. Set up Windows. There are three steps in setting up Windows for a RateManager deployment.
2. Install IBER 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 Enterprise Rating

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 IBER 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: Performing Updates in RateManager

Step 13: Export Insbridge Registry Key for Backup

Chapter 2

SETTING UP WINDOWS

IBER installers should be familiar with managing a Windows server.

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

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

- **Step 1:** Set up an Insbridge User. **This is a required step.**
- **Step 2:** Setting Windows 2008 web server roles.
- **Step 3:** Verify SQL Server settings.

ADMINISTRATIVE USER ACCOUNTS

No administrative account is created when IBER is installed. An administrative user account must be created on the server where the IBER system is going to be installed. This required account is the Insbridge Local User Account.

The Insbridge Local User needs to be a member of the User group and requires certain privileges in order to fully control the entire IBER environment. For ease of installation and if the server is dedicated to the Insbridge Enterprise Rating System, this user can be added to the local machine Administrators group.

FILE PERMISSIONS

The Insbridge User requires read/write permissions on:

- The Windows Temp Folder. This is necessary for MSMQ.
- The Insbridge Application Pool Identity
- The Insbridge Folder

The Insbridge user must also be given **full control** over the following registry key:

- HKEY_LOCAL_MACHINE/SOFTWARE/Insbridge

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.

Insbridge User Password

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

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

The installation automatically applies 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 recreates the COM+ applications, virtual directories and IBFA instance with the updated Insbridge user password.

Installer Permissions

The installation program requires that the installer have administrator rights on the machine where the install is occurring. The install must be run as administrator.

***NOTE**: If the Installer has permissions, an Insbridge User account can be created 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.*

DATABASE USER ROLES AND PERMISSIONS

If a more granular approach is required for management of security of the IBER 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 Enterprise Rating System will fail. An experienced database administrator's expertise is highly recommended before making any security changes.*

An ibru account must be created for the Insbridge application.

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, the database will need to be updated manually. If disk admin permissions are not allowed, backups will have to be done outside of RateManager.

STEP 1: INSBRIDGE LOCAL USER ACCOUNT SETUP

Before starting the installation, create a local user account where the Insbridge Framework is being installed.

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**.

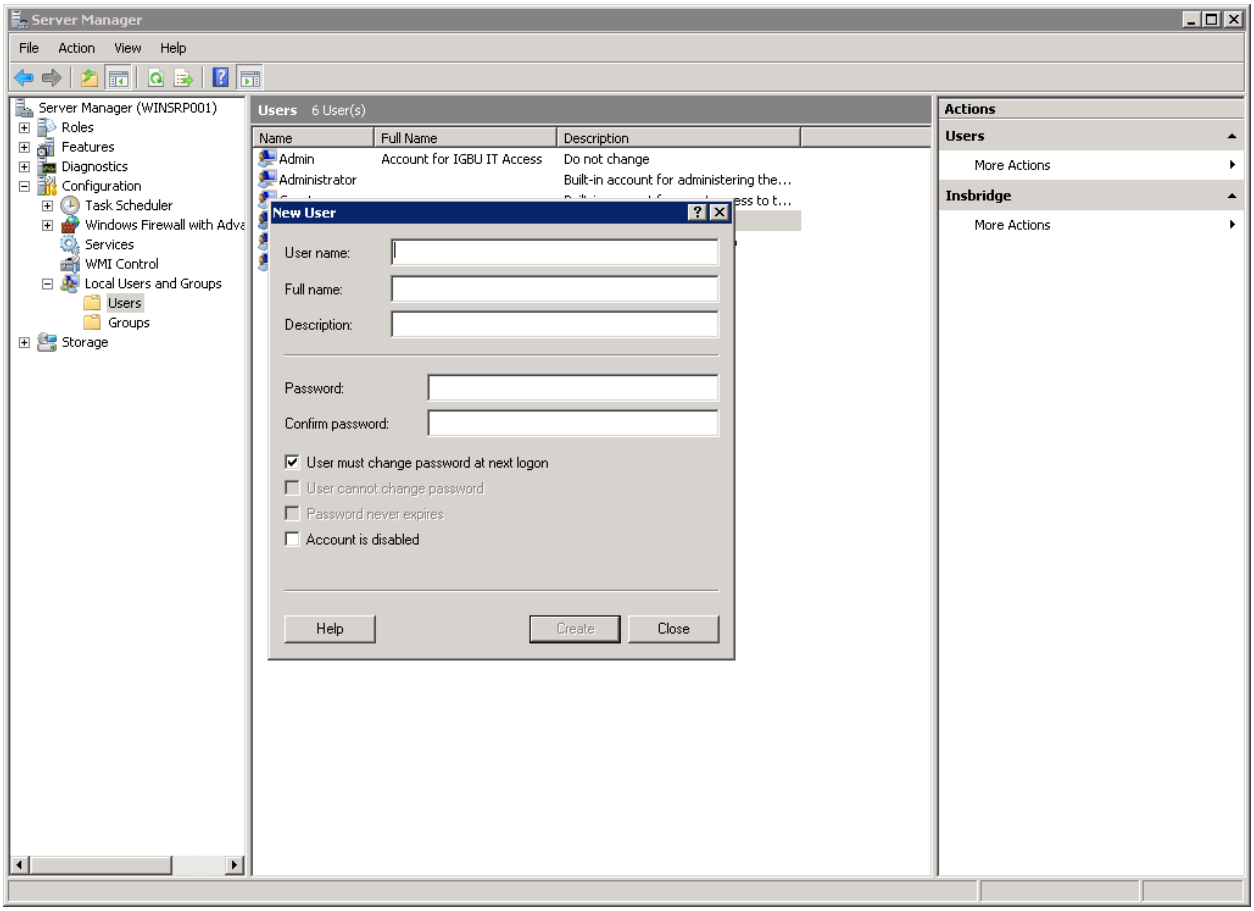


Figure 1 Creating New User

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.

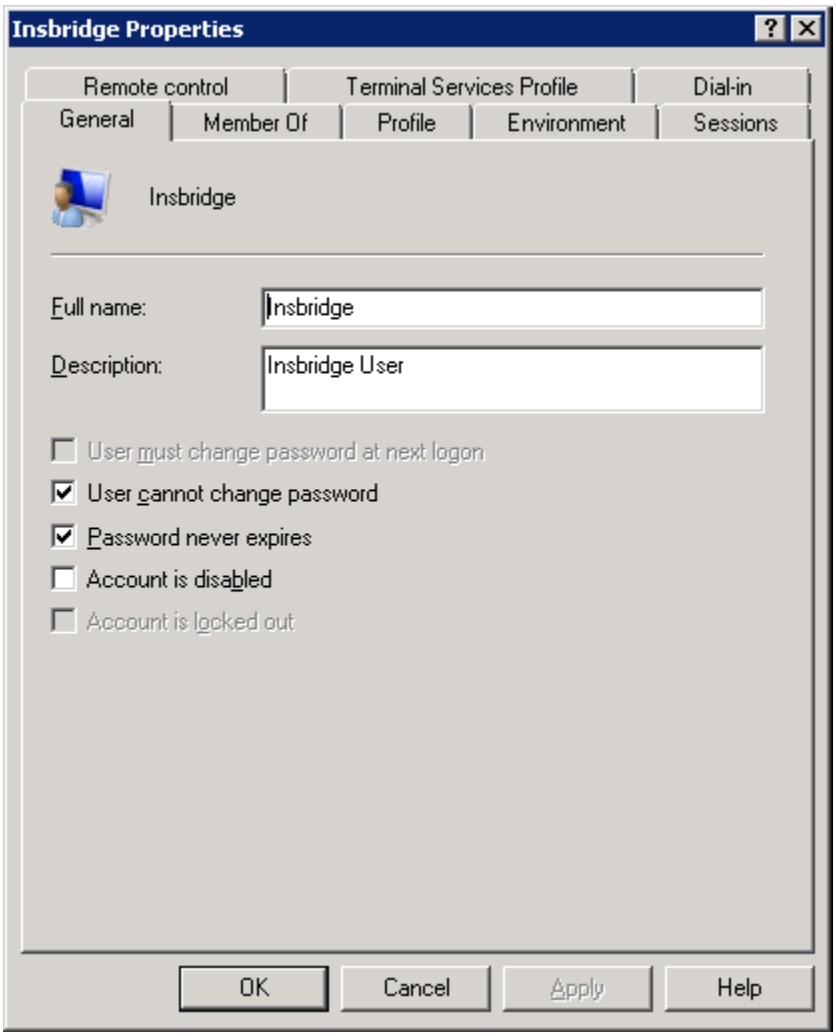


Figure 2 Adding User information

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

STEP 2: WINDOWS 2008 WEB SERVER ROLES

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**

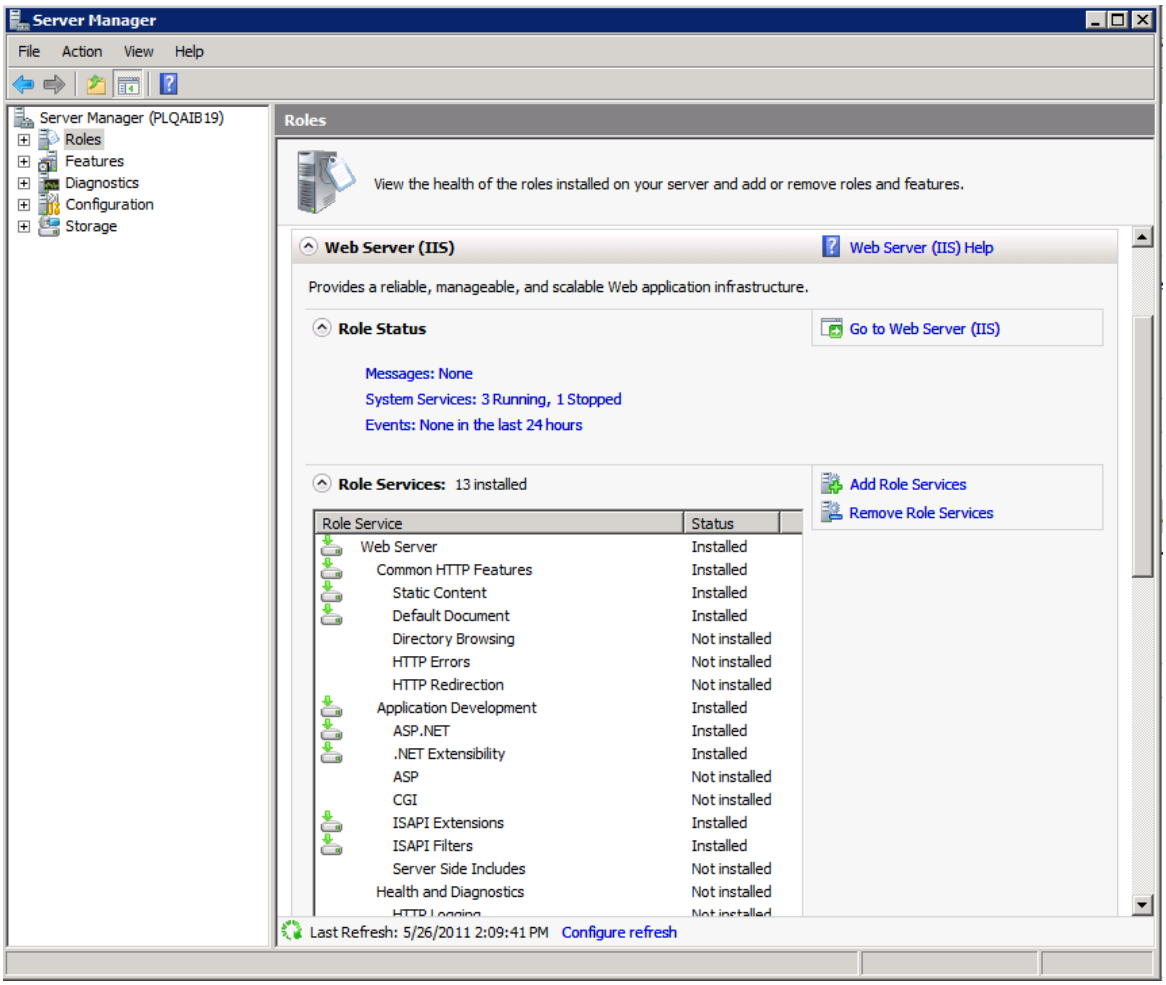


Figure 3 Windows 2008 Web Server Roles

To Add a Role:

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

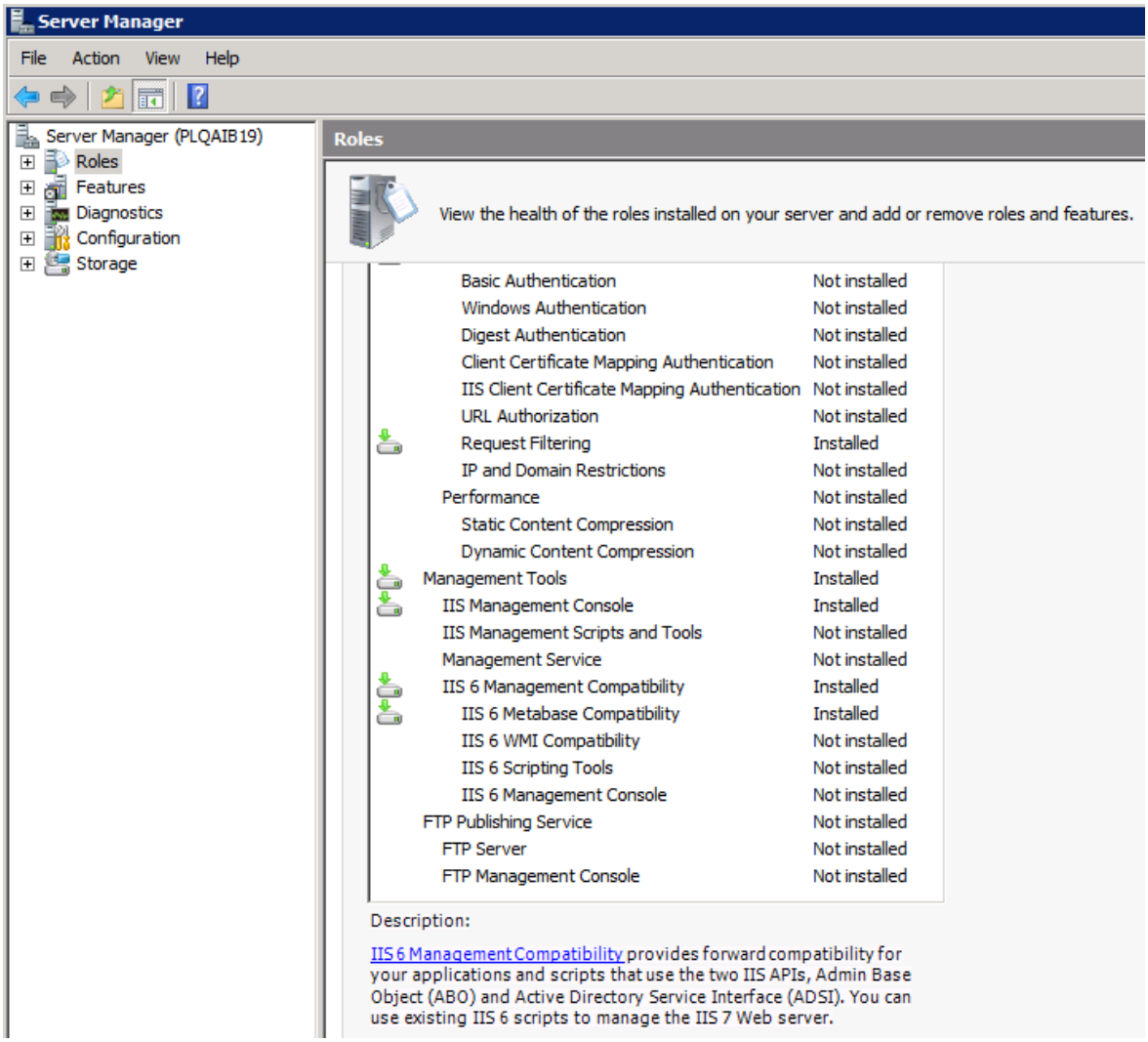


Figure 4 Adding IIS 6 Metabase Compatibility

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

STEP 3: 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 IBER 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.

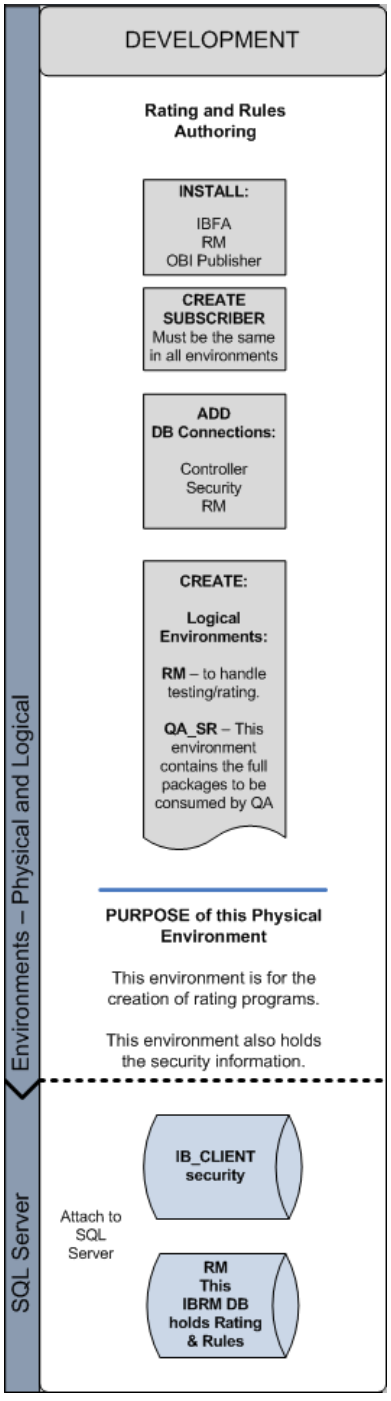
- **Server Authentication:** Should be set to SQL Server and Windows Authentication mode.
- **Collation and Sort Order:** Currently supported is the default SQL Server collation using SQL_Latin1_General_CP1_CI_AS and sort order plus case sensitivity using Latin1_General_BIN as the server collation. The 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.*

Chapter 3

FULL RATEMANAGER INSTALLATION

This installation installs RateManager and the Insbridge Framework Administrator (IBFA). This is for a Windows only environment, using a SQL Server database.
Before installing, please verify that the system requirements are in place.



The installation should be performed in the following order:

1. Install the IBER 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 for 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 IBER databases is next. There are two databases that must be in place.
    a. IB_Client
    b. IBRM
7. Enter IBFA and Configure:
    a. Create your subscriber.
    b. Add database connections.
8. Verifying Component Services.
9. Allowing for WCF Activation. This is required.
10. Install OBI Publisher.
11. Start Insbridge Message Service.
12. Login to RateManager and perform IBER database updates.
13. Create Backup of Registry Key.

The installation must be run as Administrator.

STEP 1: INSTALL INSBRIDGE ENTERPRISE RATING

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

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

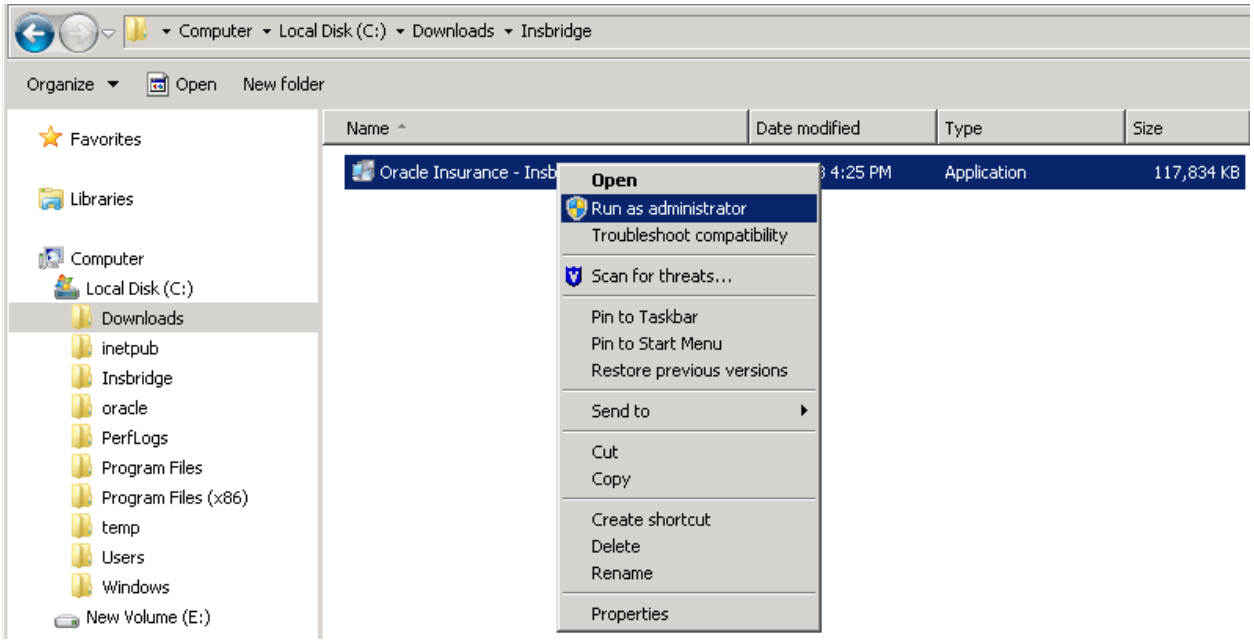


Figure 5 Install as Administrator

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

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

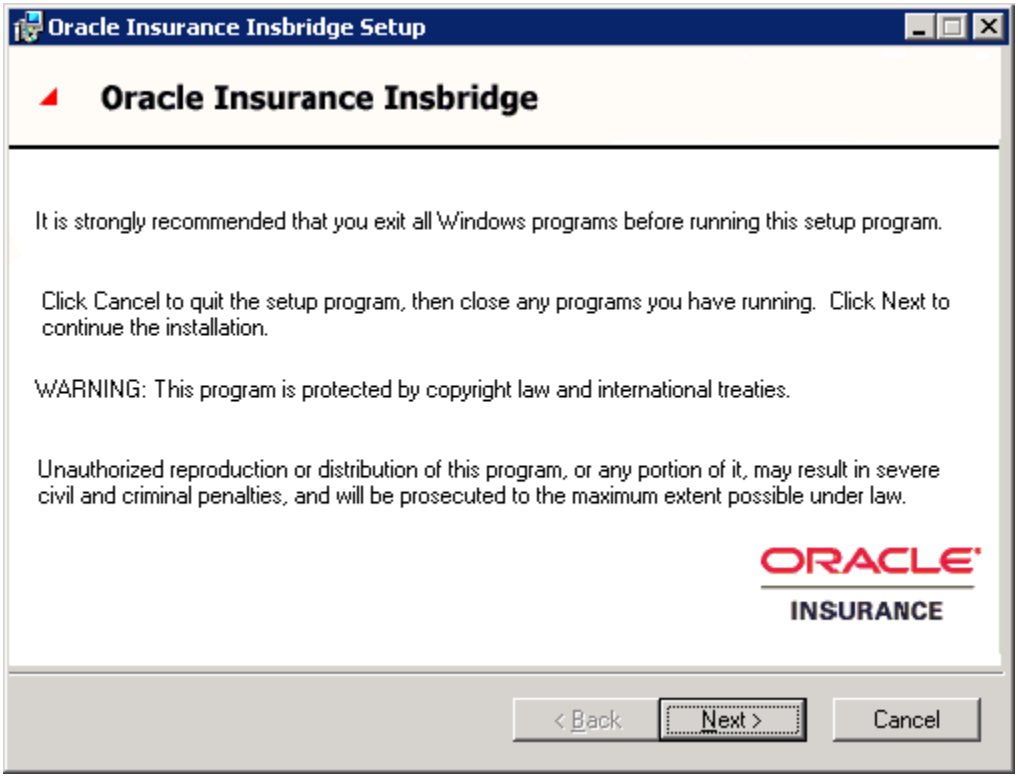


Figure 6 Installing Insbridge

3. Click **Next** to continue.

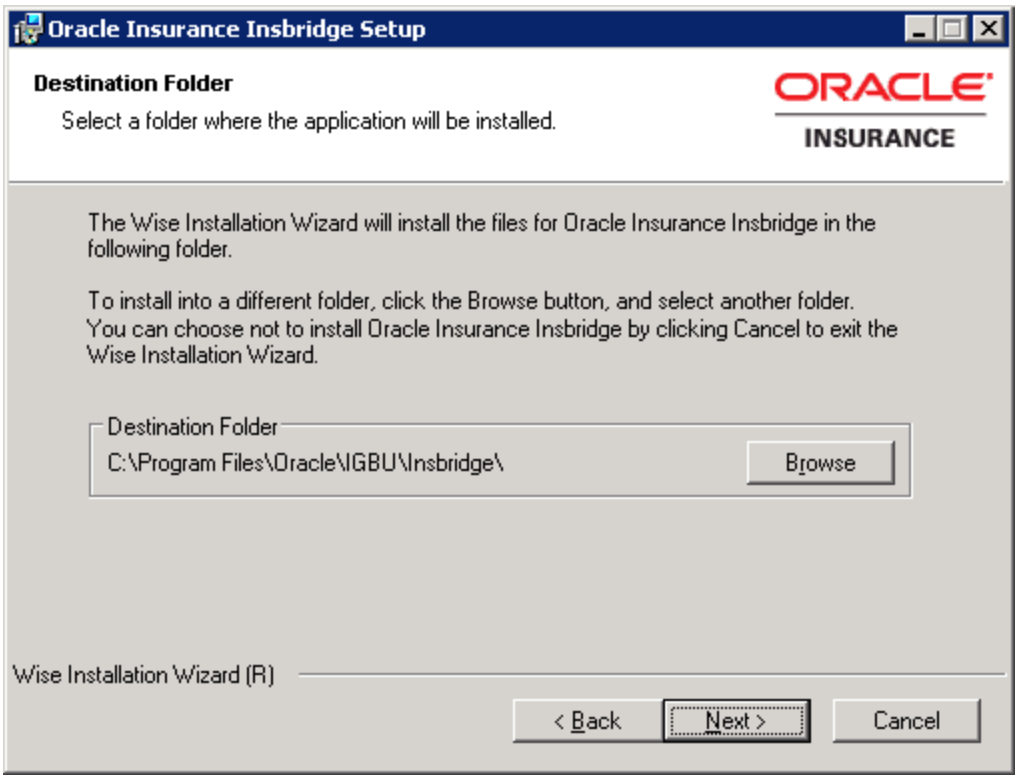


Figure 7 Entering the Destination Folder for Insbridge

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.

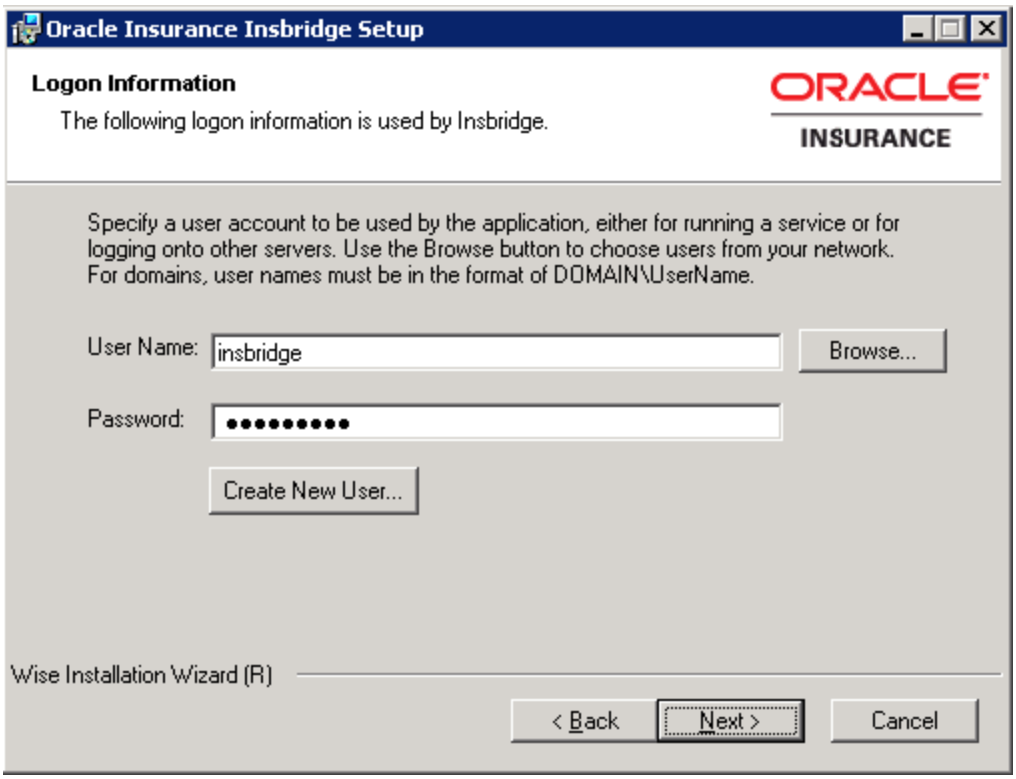


Figure 8 Logon Information

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 13.

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.

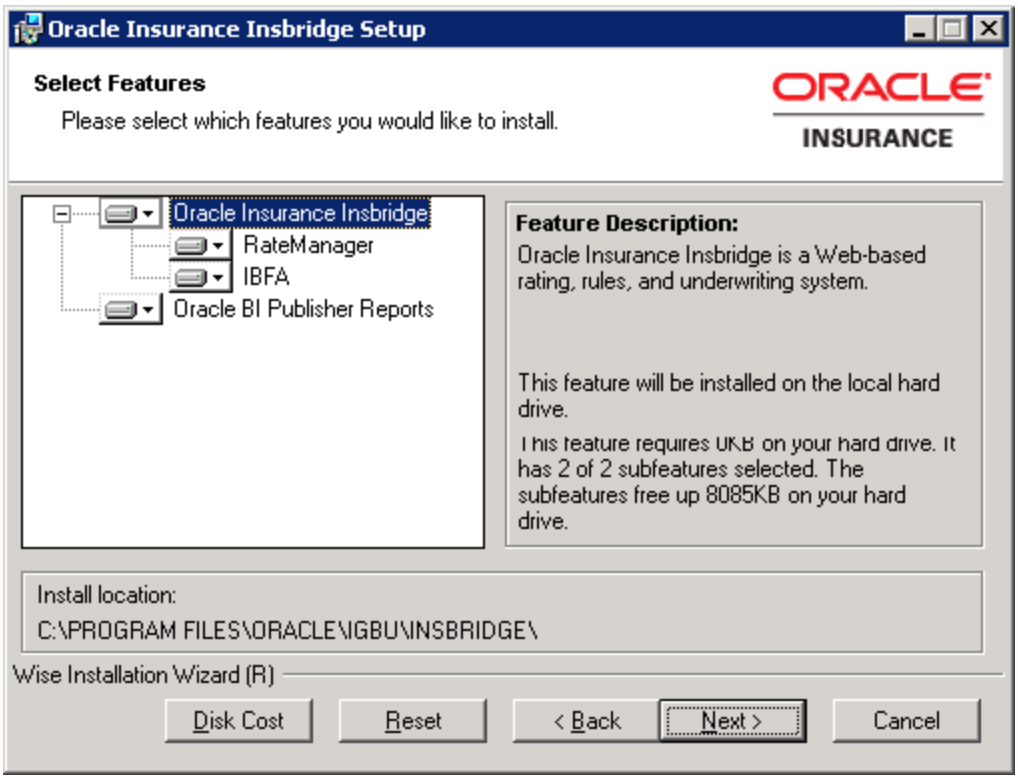


Figure 9 Selecting Features for Installation

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. RateManager is the only one that you will be allowed to not install. Click **Next** to continue.

Options are:

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

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

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

- **Oracle BI Publisher Reports**:
  - 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 IBER application will be installed on local hard drive.

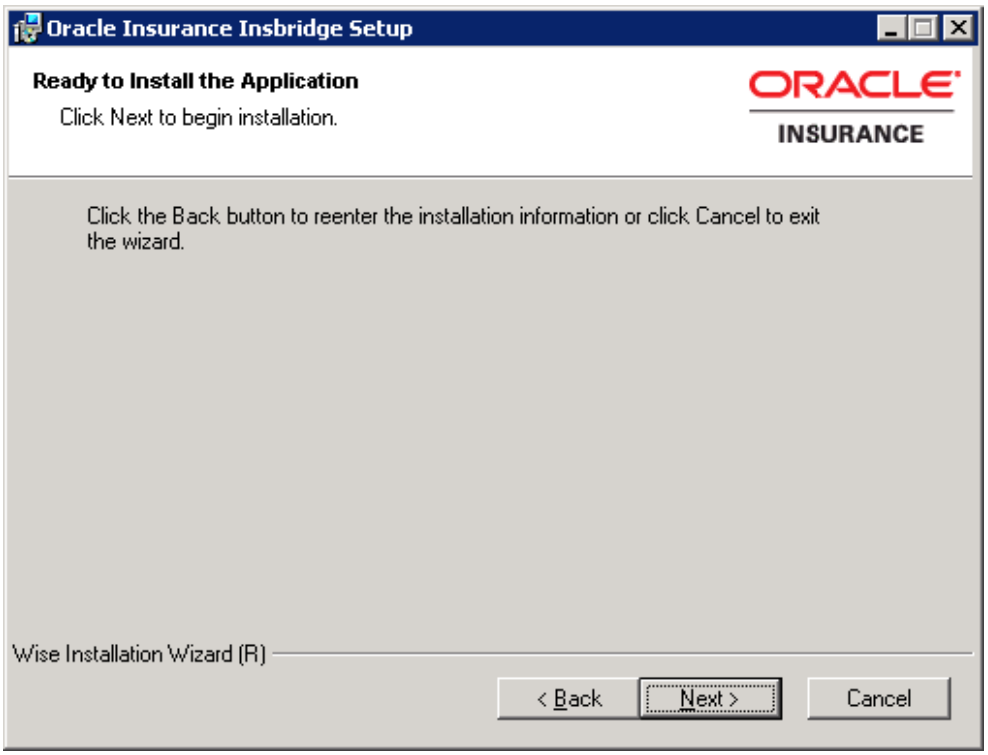


Figure 10 Ready to Install

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.

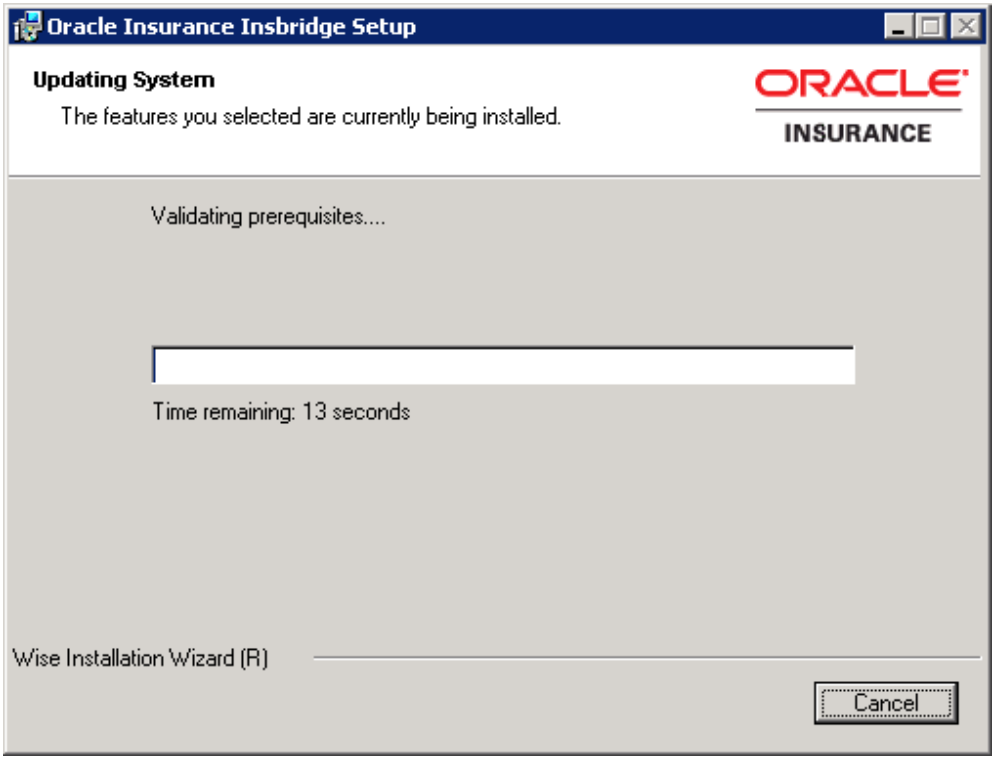


Figure 11 Installation Progress

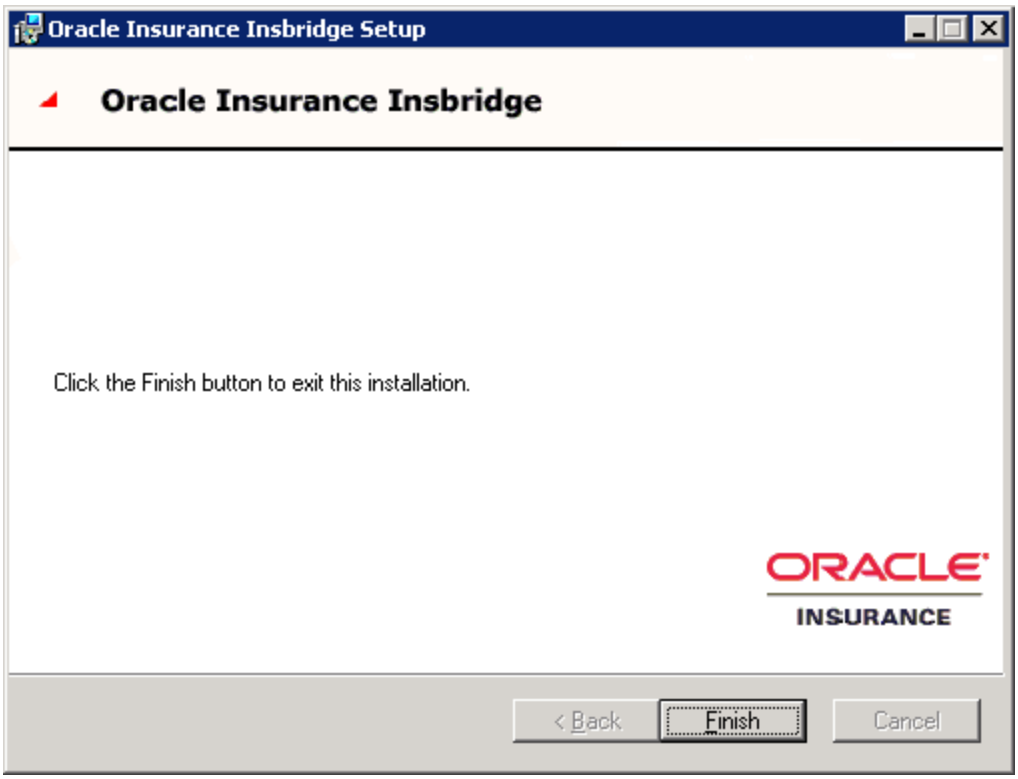


Figure 12 Install Finish Screen

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. Select **Run** from the Start Menu.
2. Type **regedt32**. Click **OK**. The Registry Editor will open.

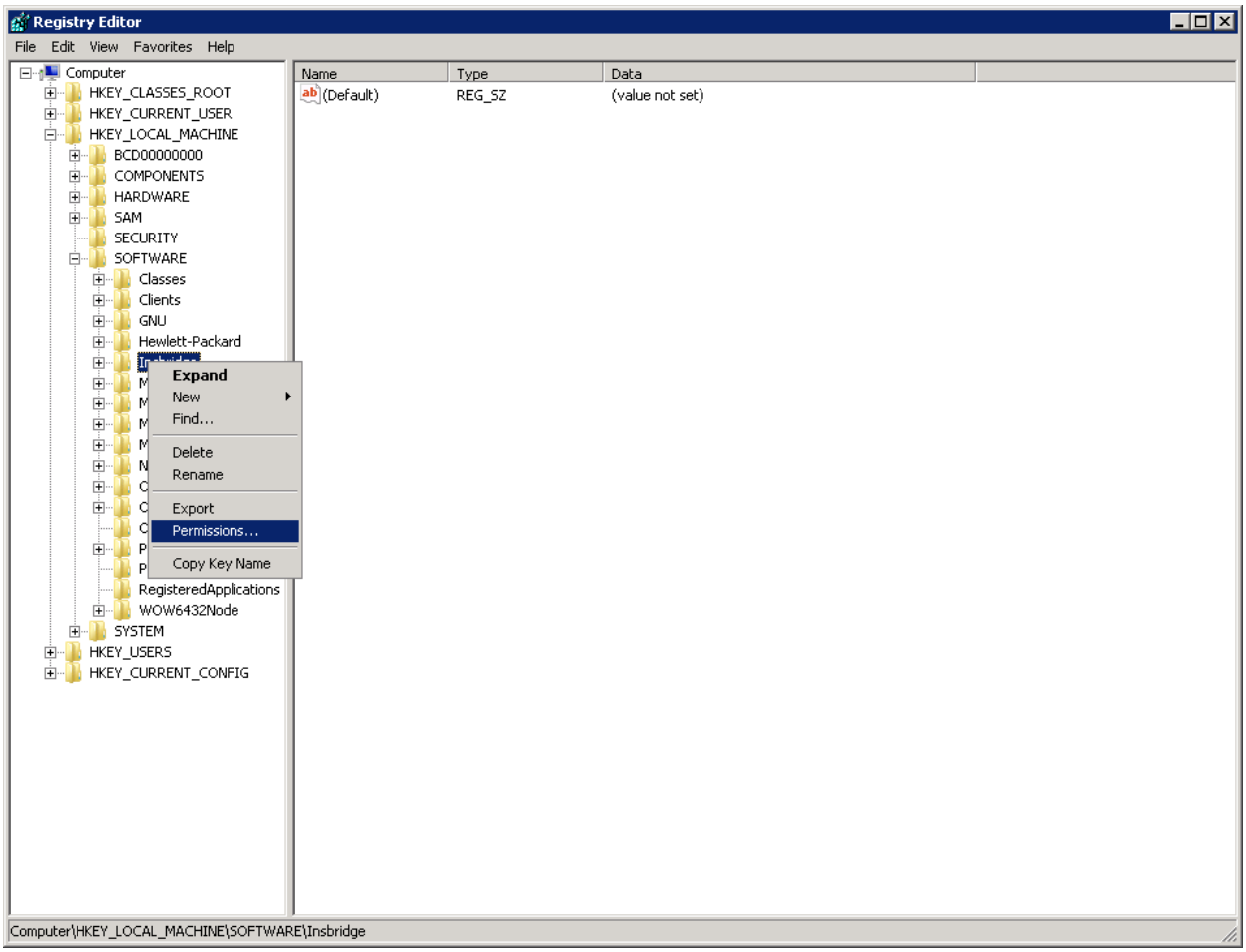


Figure 13 Configure Registry Access Windows Server

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:

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

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

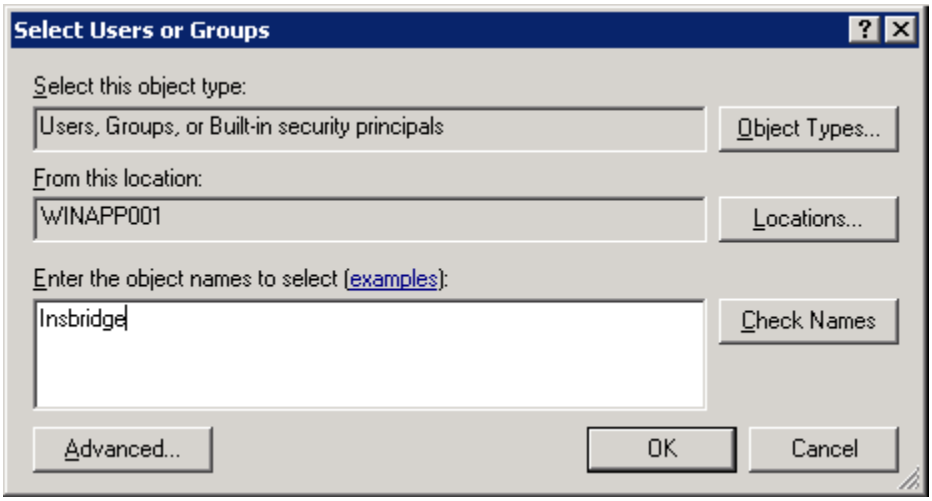


Figure 14 Entering the User

3. 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.

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

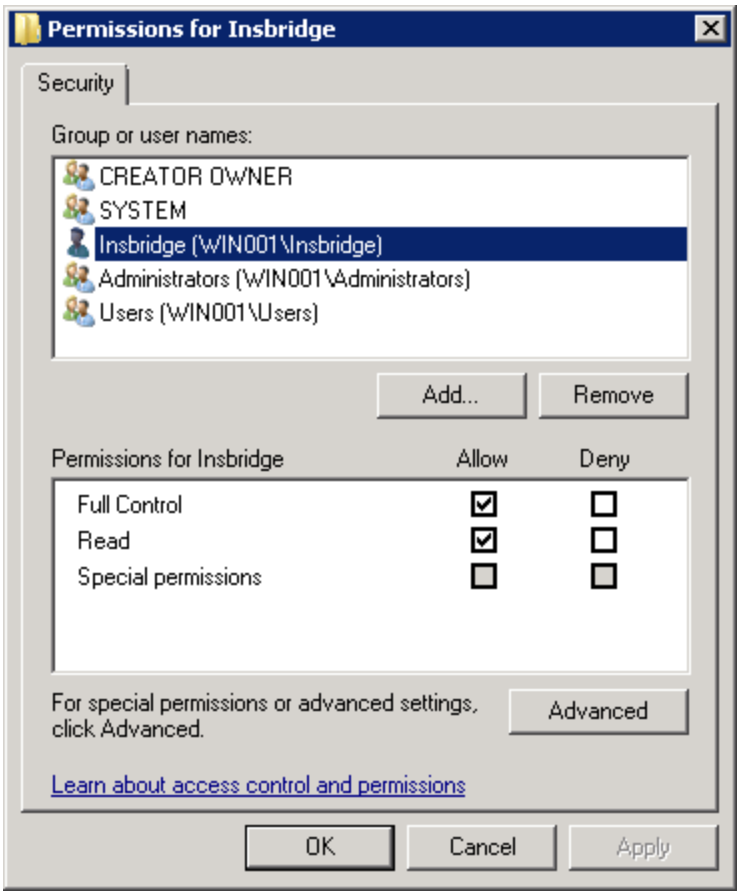


Figure 15 Applying Permissions

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

6. Click **OK**.

7. Close the registry and continue with the install.

STEP 3: INSBRIDGE APPLICATION POOL

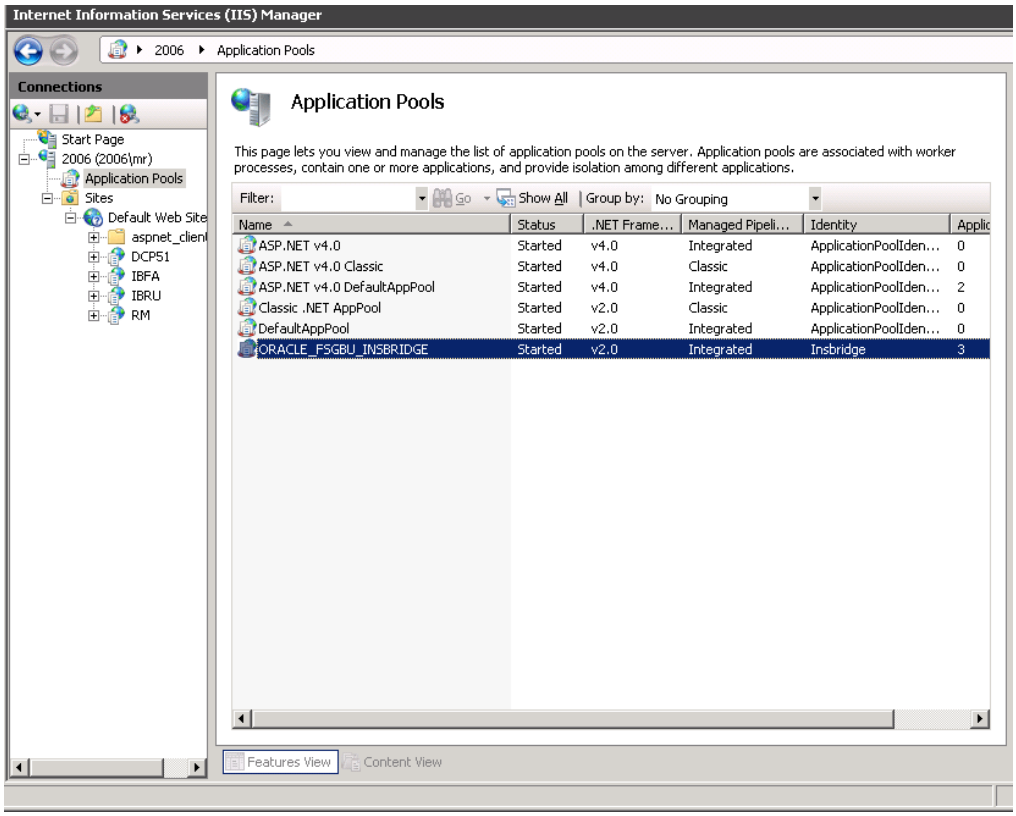
Insbridge requires .NET framework setting of v2.0. This may present conflicts with other applications in the default application pool that require a higher setting. To avoid conflict and improve performance, a separate Insbridge Application Pool must be created.

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**.

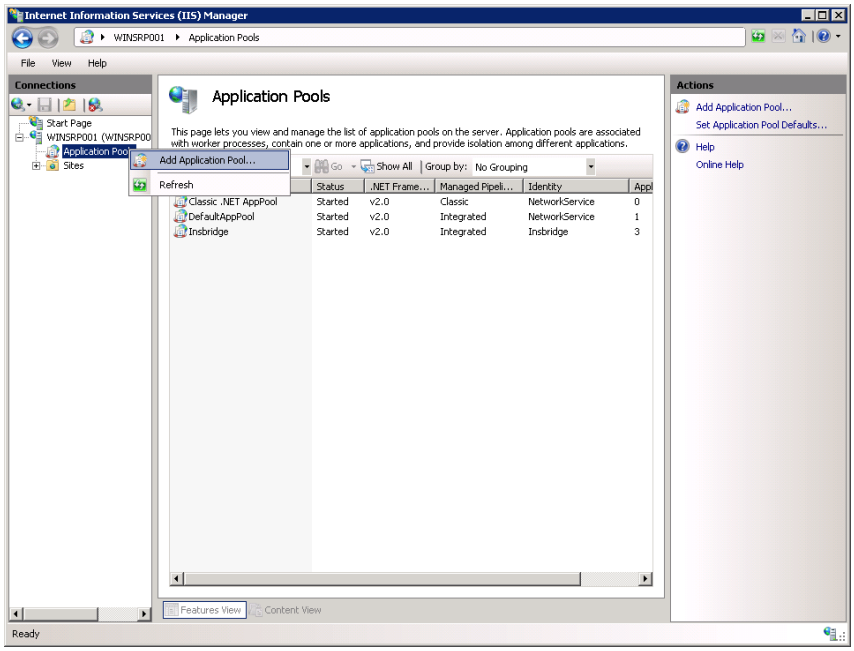


Figure 16 Navigating to Application Pool

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.

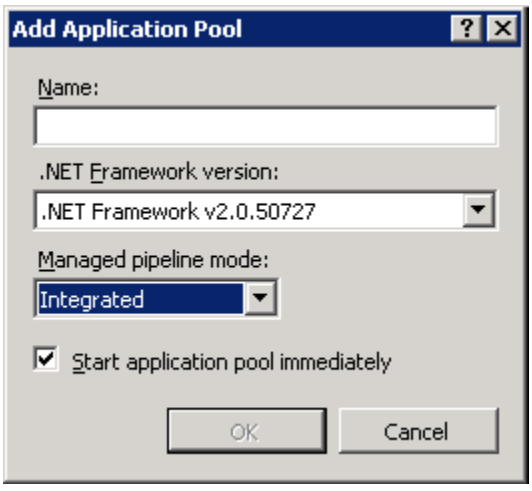


Figure 17 Creating a New Application Pool

Step 2: Update Settings

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

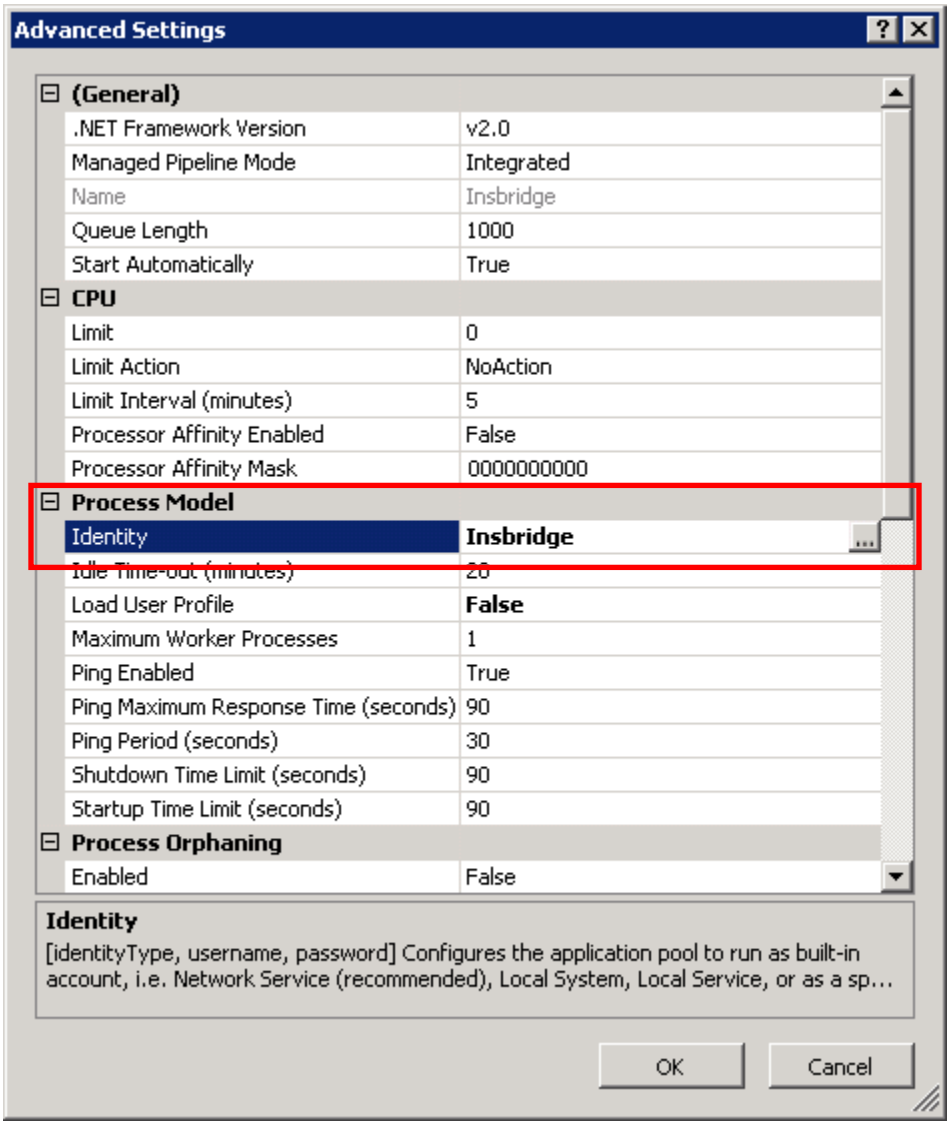


Figure 18 Selecting Application Pool Properties

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

3. Verify the identity is Insbridge. If the identity is not Insbridge, you can update it. For the Identity **choose to use custom account and enter the same user that was used to install IBER**.

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

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

Next, you will need verify or associate 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**.

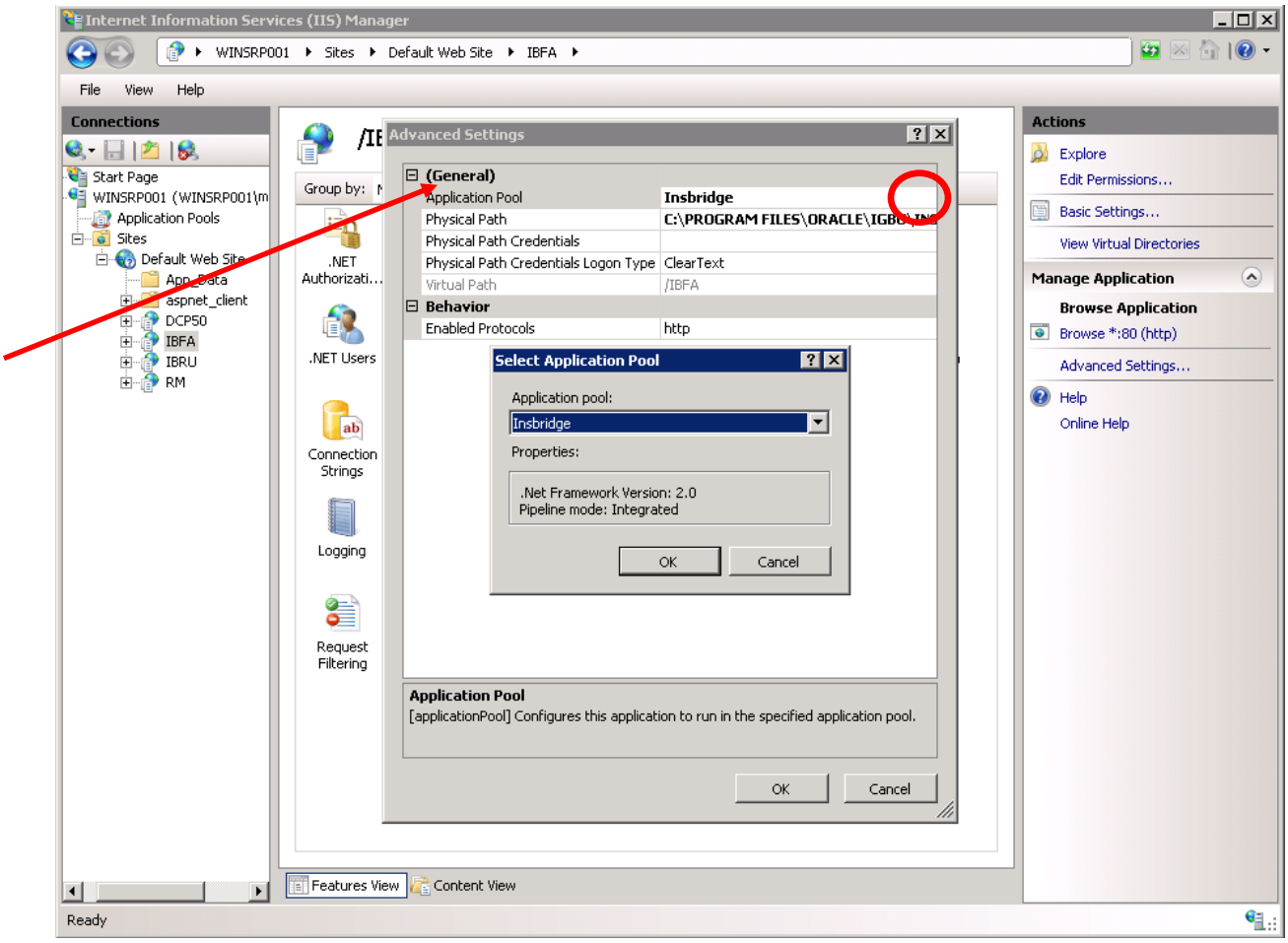


Figure 19 Associating the Virtual Directories with the Insbridge Application Pool

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 RM, and IBRU.

7. Verify that the Insbridge application pool has at least three 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**.

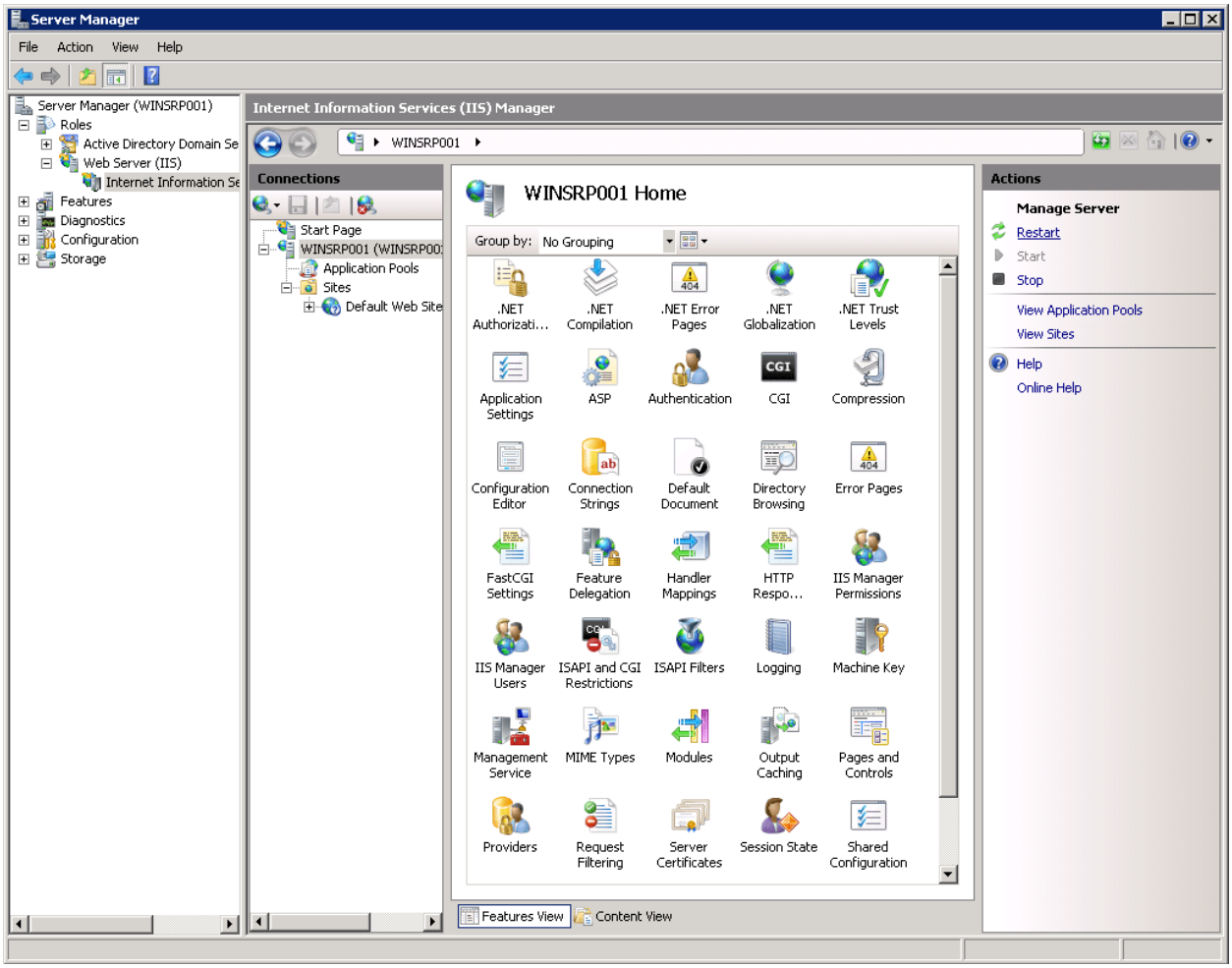


Figure 20 Restarting IIS

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.

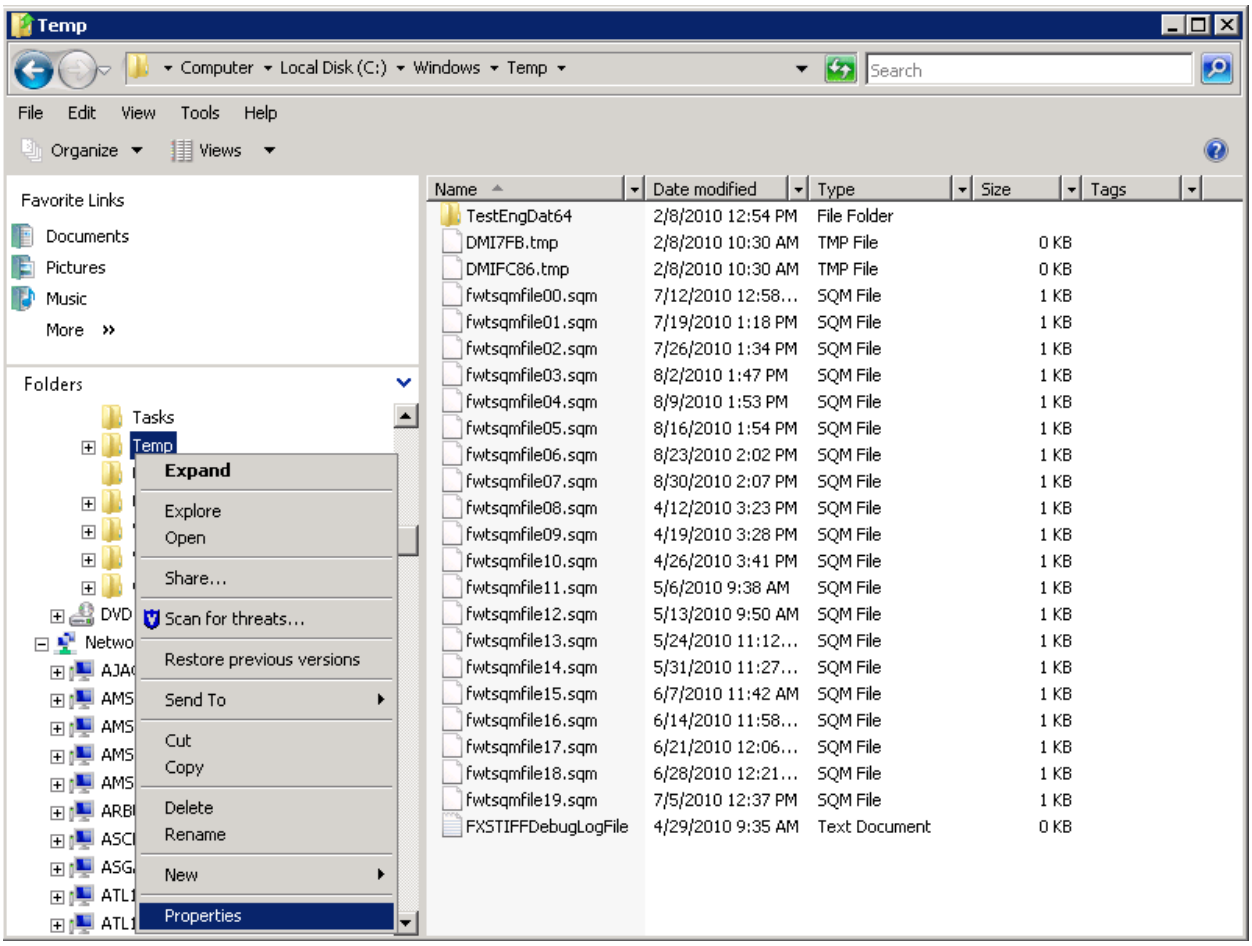


Figure 21 Assigning Permissions for the Insbridge User on Windows Temp

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**.

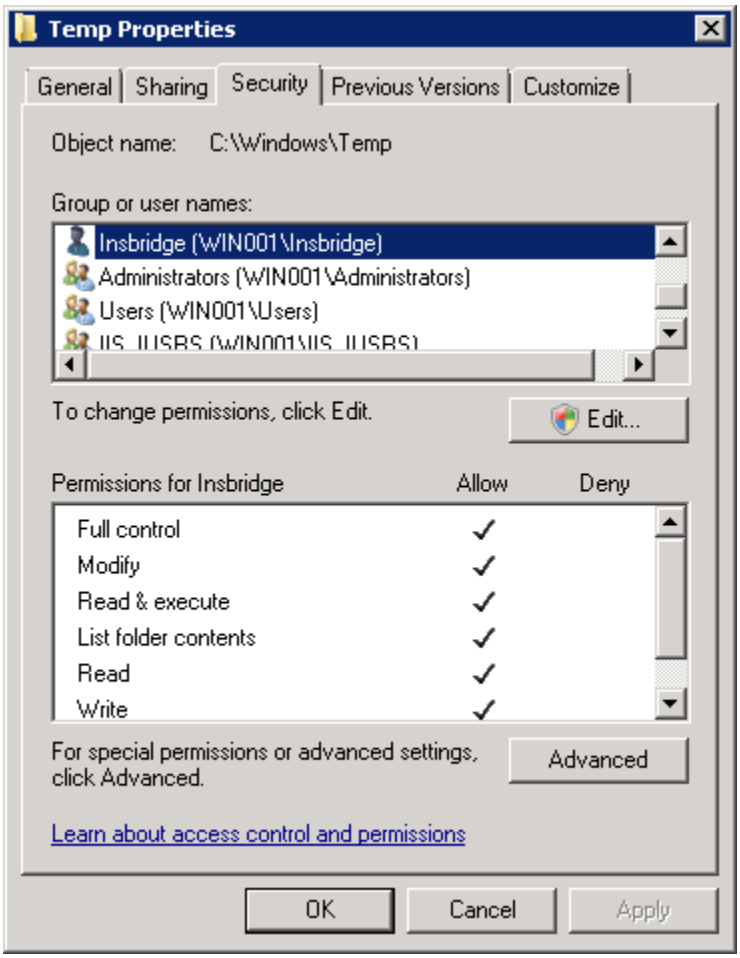


Figure 22 Temp File Properties

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.

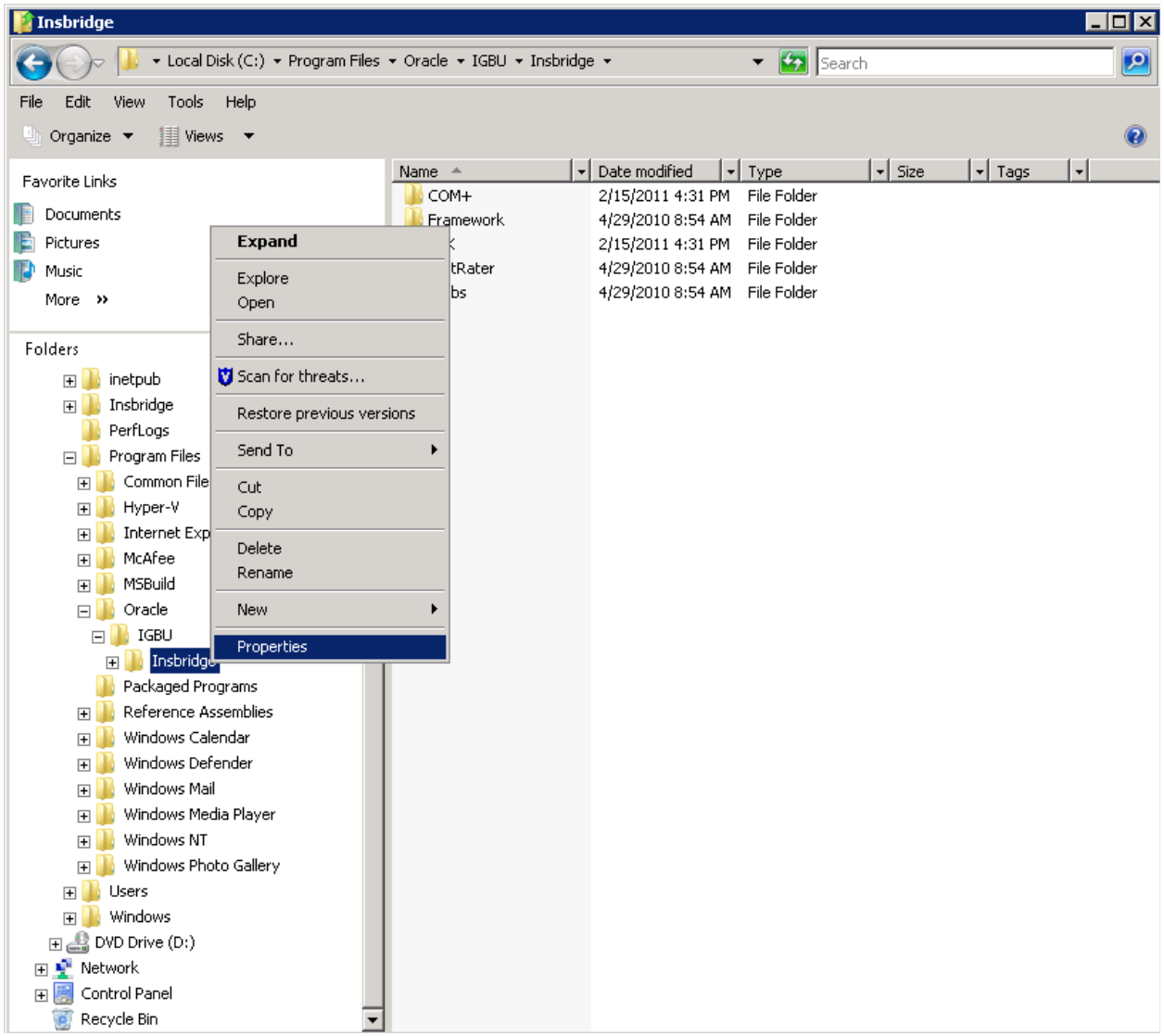


Figure 23 Assigning Permissions for the Insbridge User on Insbridge

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

4. Select the **Security** tab.

5. Click **Edit**.

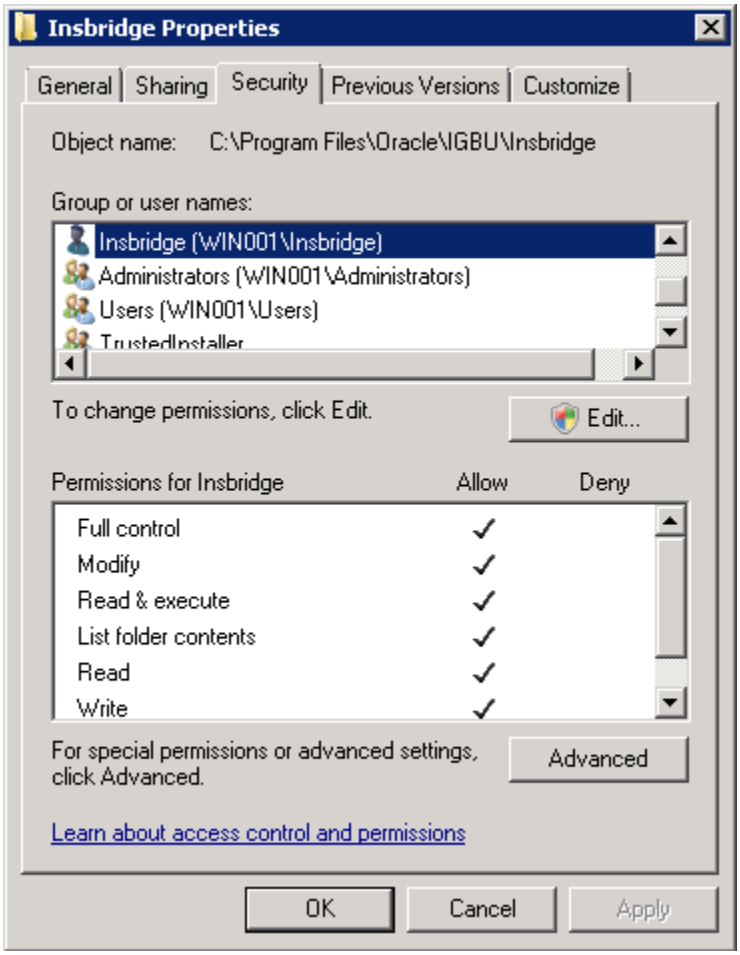


Figure 24 Insbridge Folder Properties

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 IBER DATABASES IN SQL SERVER

Because many corporate environments have a separation between the system administrator and the database administrator, the following process may require both administrators' access and permissions. Make sure you have a SQL Server account called **ibru**.

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

NOTE: *If you are unsure how to perform a database restore, please consult with your database administrator.*

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

1. Located in the Insbridge Installation Directory:

   - SQL Server
     - RateManager**:** IBRM
       - Latin1_General_BIN
         - DATABASE_BACKUP_IBRM_TEMPLATE_CASE_SENSITIVE.bak
       - SQL_Latin1_General_CP1_CI_AS
         - DATABASE_BACKUP_IBRM_TEMPLATE.bak
     - Security**:** IB_CLIENT
       - SQL_Latin1_General_CP1_CI_AS
         - DATABASE_BACKUP_IB_CLIENT_TEMPLATE.bak

2. Select the RateManager backup file you want to use, case sensitive or non-case sensitive. The Security**:** IB_CLIENT file is only non-case sensitive.

3. **Copy both files** to an appropriate database folder on the machine where SQL Server is installed. For example, [Drive]:\Program Files\Insbridge\Databases. If you are unsure of a location, please consult with your database administrator.

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

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

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

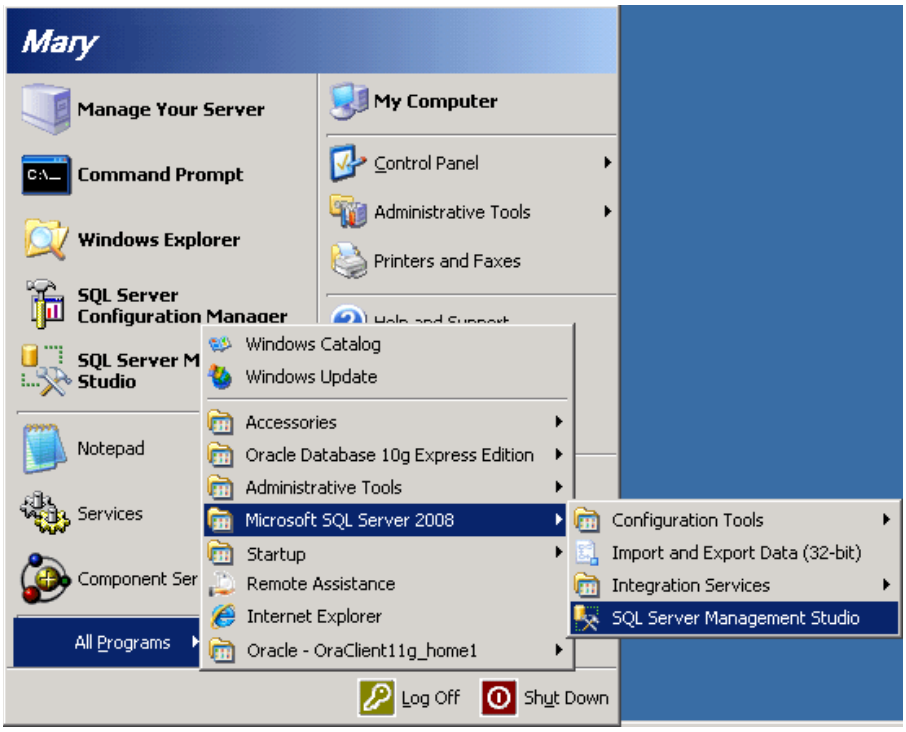


Figure 25 Restoring a Database to SQL Server

6. Go to Databases.

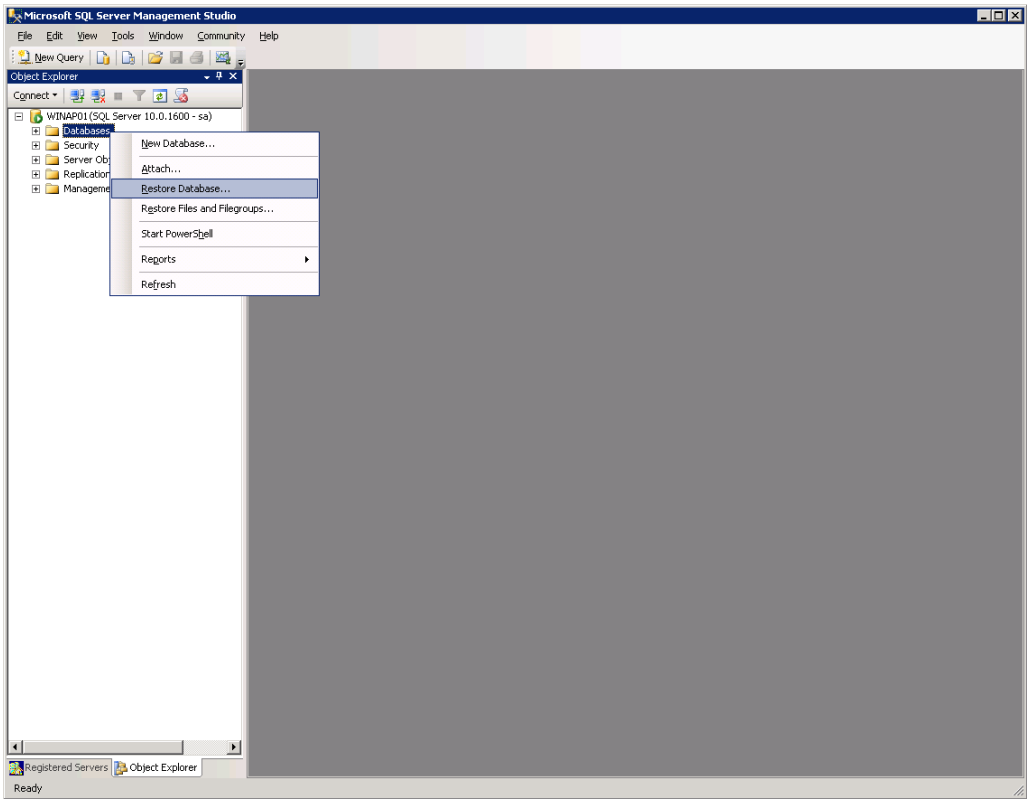


Figure 26 Right Click to Restore Database

7. Right click on **Databases**.

8. Select **Restore Database…** A separate screen is displayed.

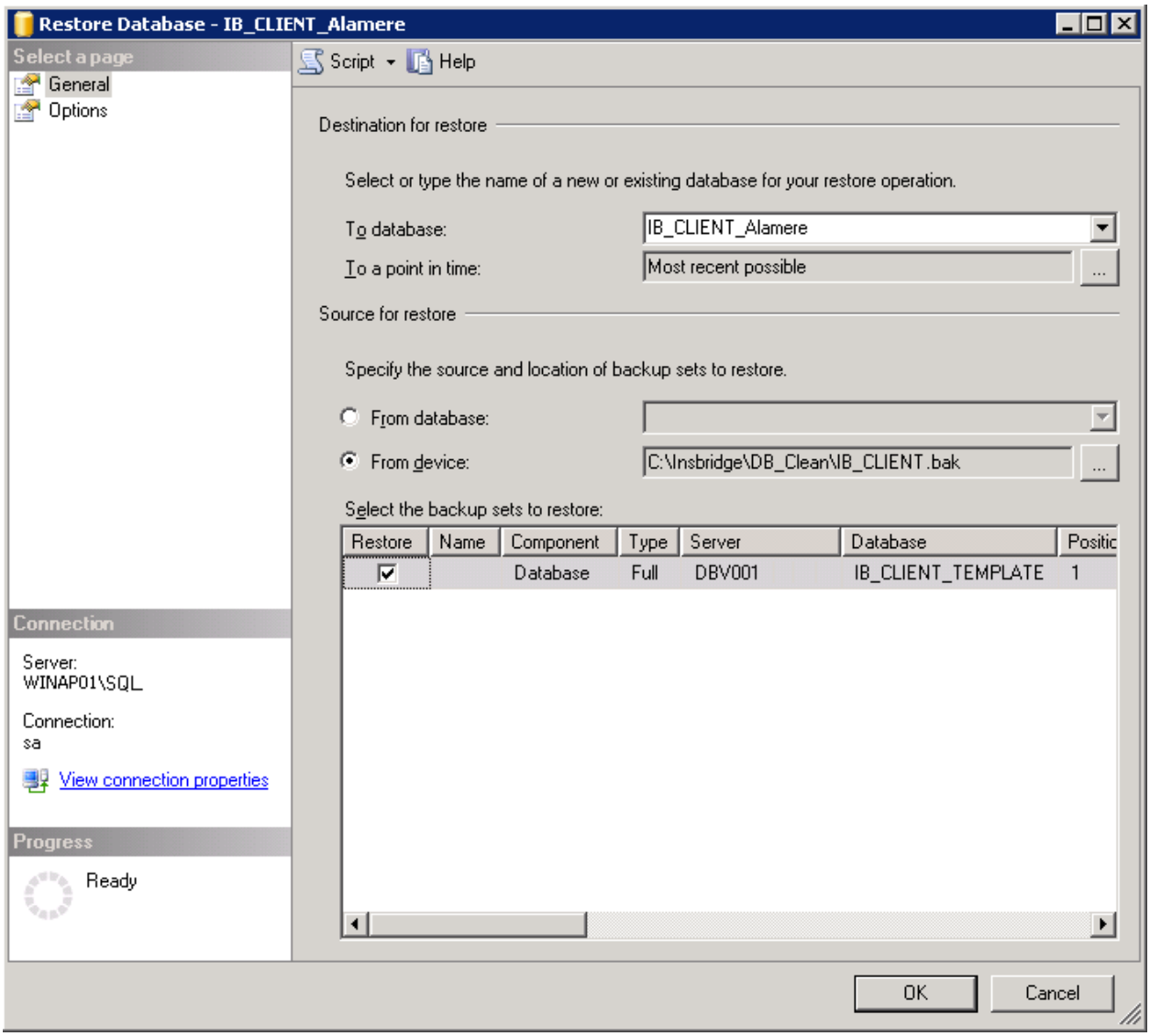


Figure 27 Restoring a Database

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

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

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

12. Click OK. Your database will be populated.

13. Verify your information. Check the Restore box.

14. Click **OK**.

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

16. Repeat for the RateManager database and any SoftRater database.

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

    If backups are to be allowed from the RateManager application (see page 40 for more details), then the ibru SQL server user account must have the **Disk Administrators SQL Server role**.

    For ease of administration, the database user should have **db_owner** permissions on the IBRM_xxxx, and IB_CLIENT databases.

STEP 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.

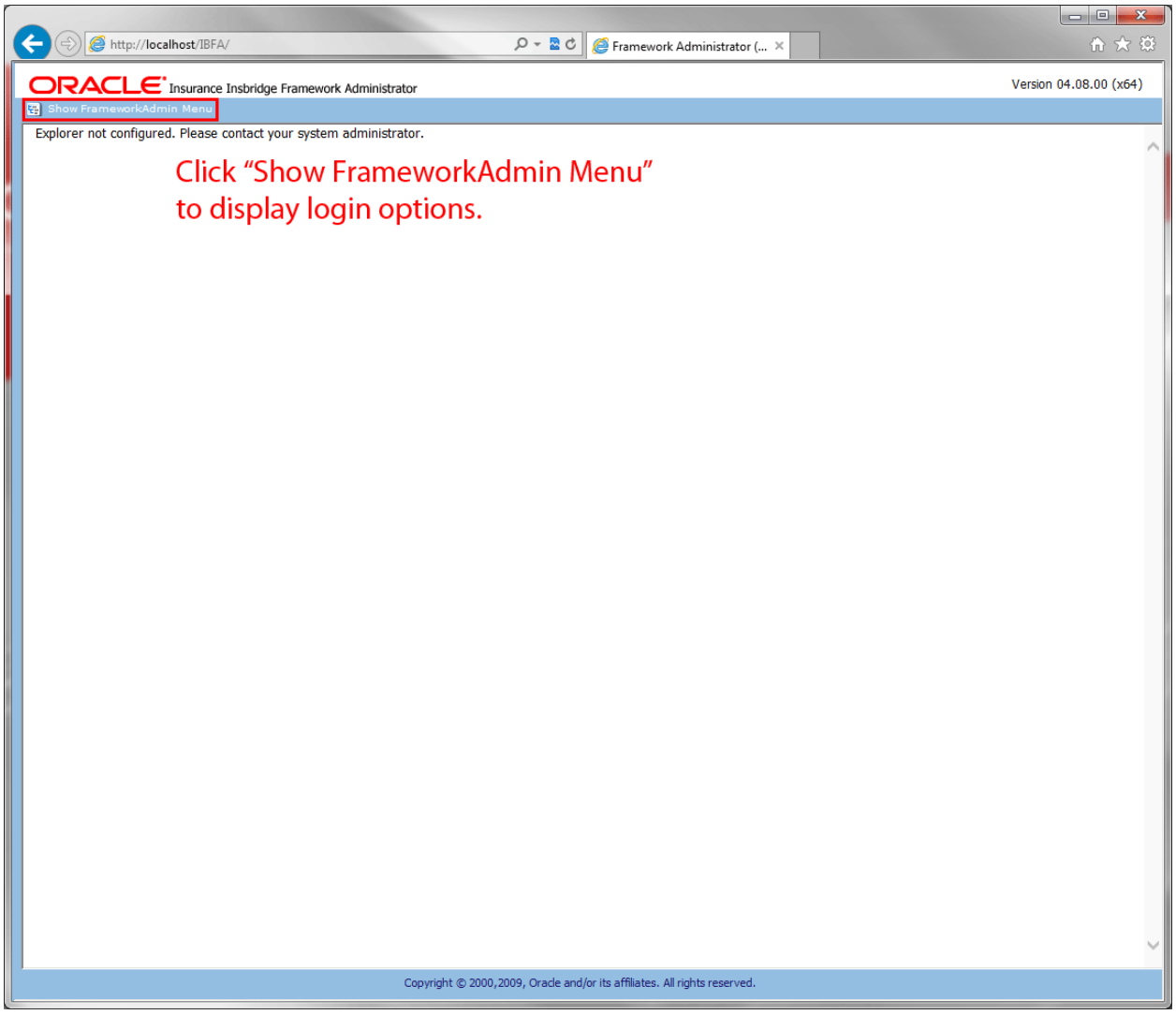


Figure 28 IBFA Landing Page

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

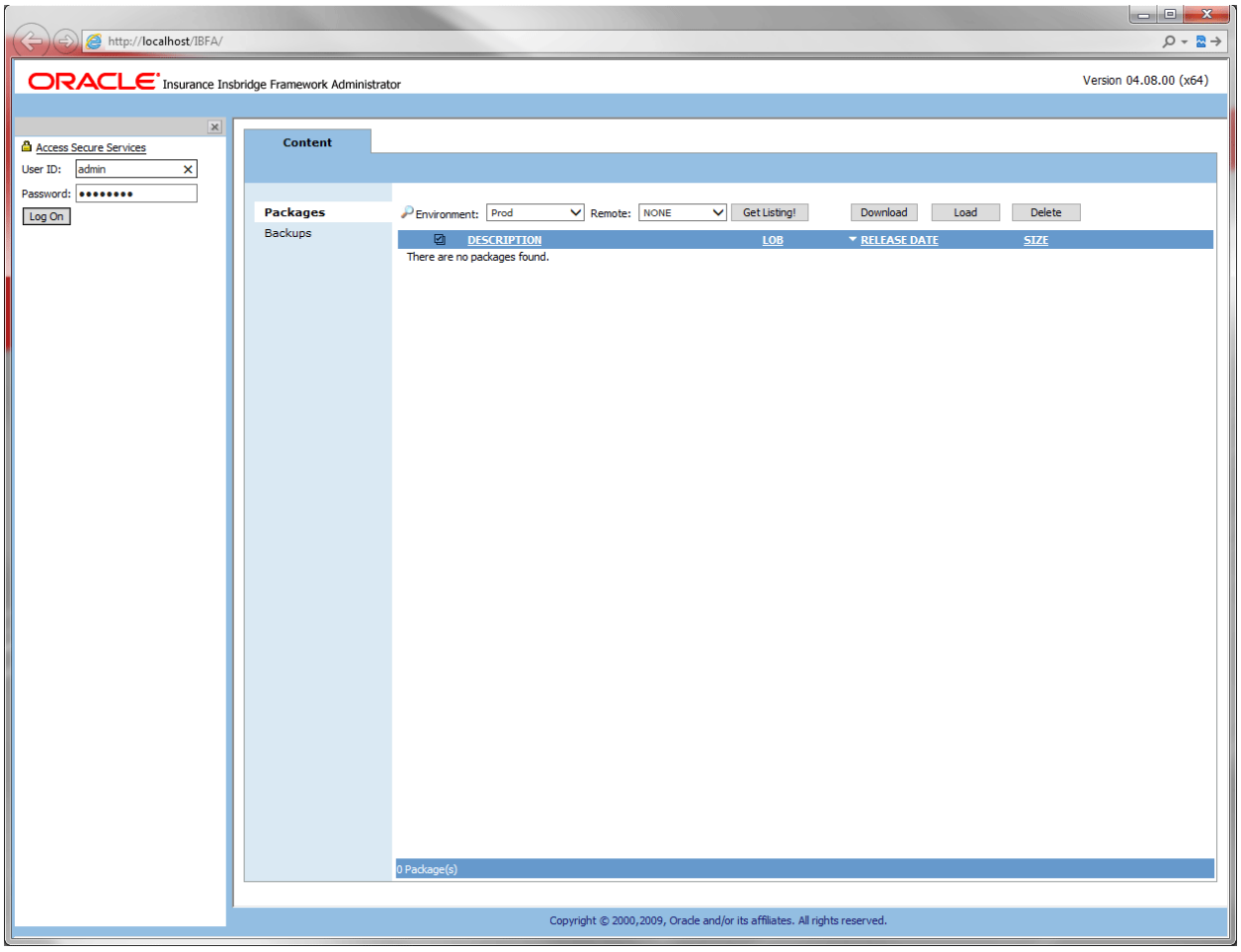


Figure 29 IBFA Login Screen

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.

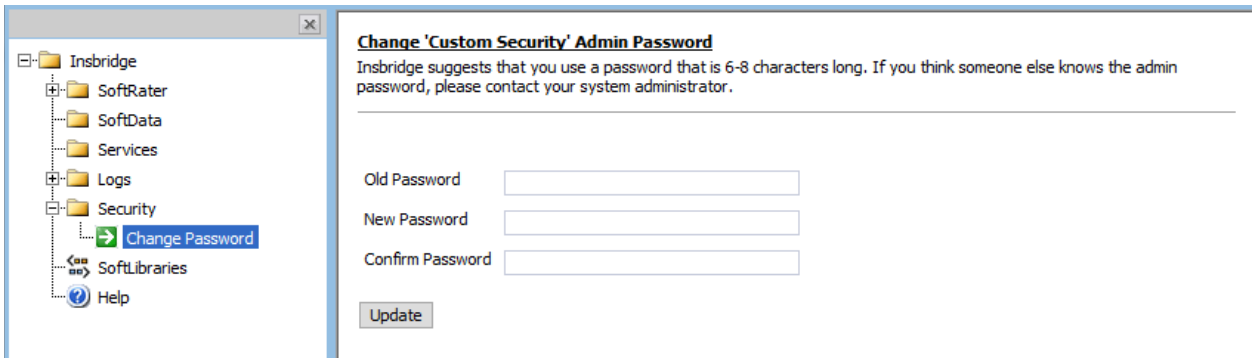


Figure 30 Updating the Default Password

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.

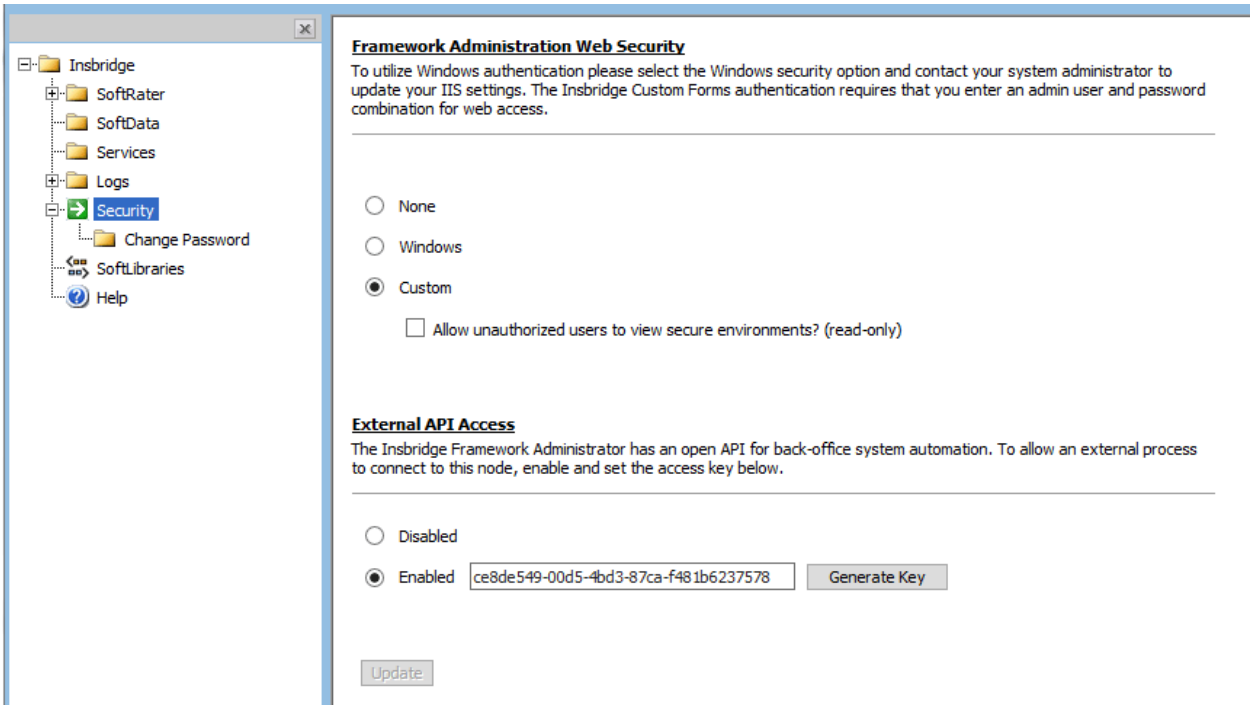


Figure 31 Selecting Security for IBFA

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.

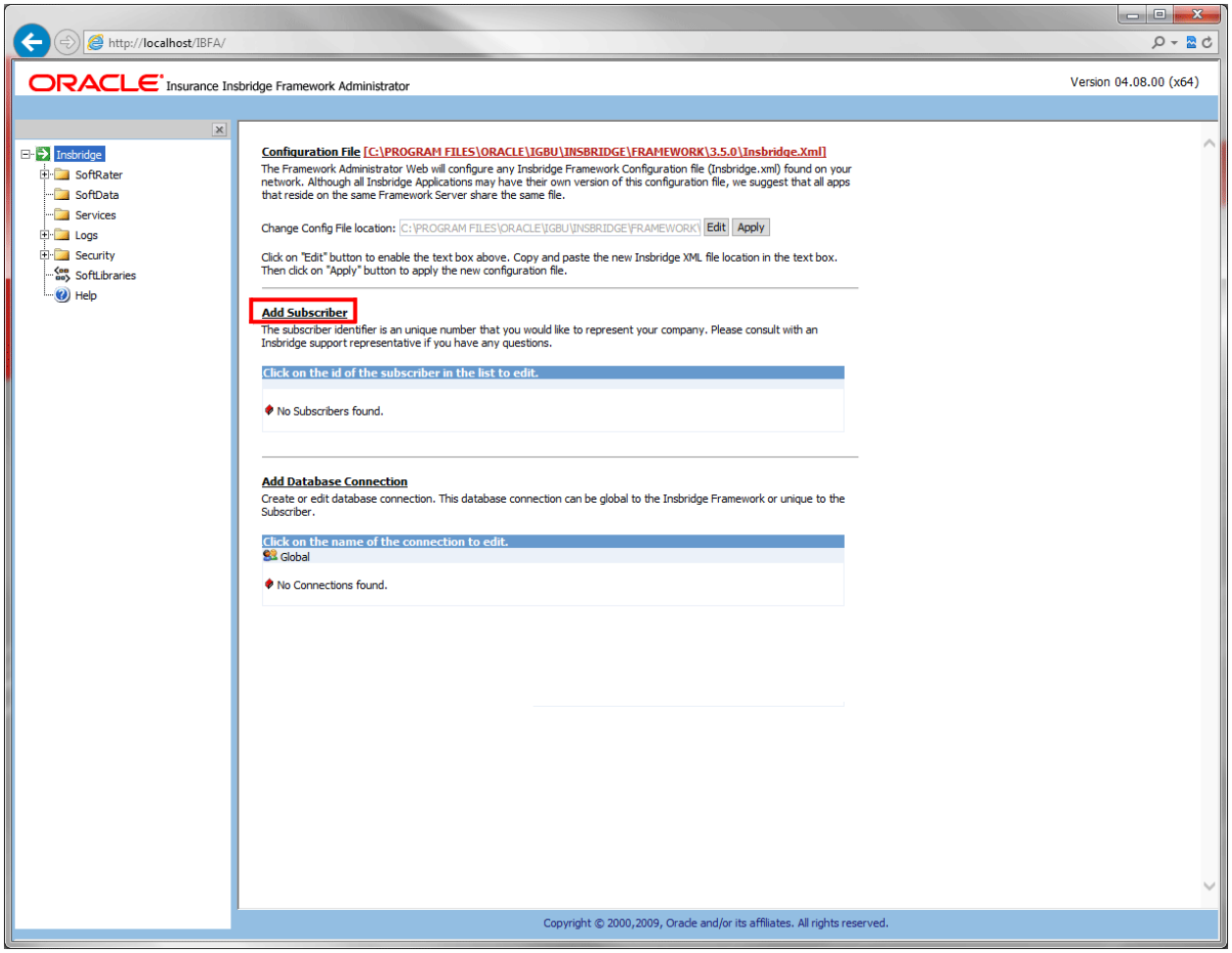


Figure 32 IBFA Home

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 Explorer 8.0 or 9.0 (32-bit). Release 04.08.xx does not support Internet Explorer 8.0 or 9.0 (64-bit).*

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

- **Step 1: Creating a New Subscriber**
- **Step 2: Adding a Global Database Connection**

- **Step 3: Adding a Security Database Connection**
- **Step 4: Adding an RM security Database Connection**
- **Step 5: Creating a RateManager Environment**

Step 1: Creating a Subscriber:

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

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

1. Click on **Add Subscriber** on the Main IBFA screen. A separate screen is 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.

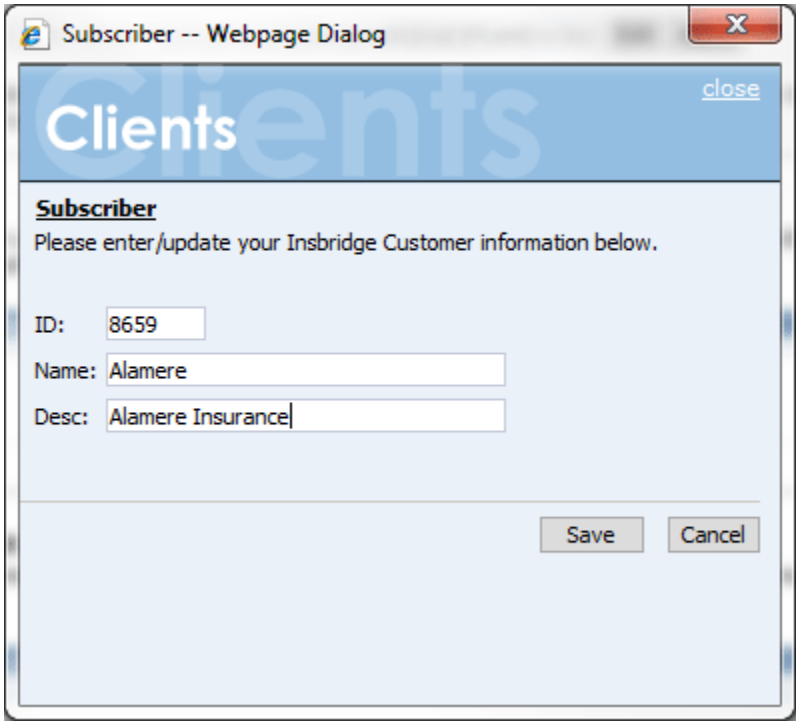


Figure 33 Enter ID

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

The Subscriber ID can be a 1-5 digit number and must unique for each subscriber. For example, if you have an instance of IBFA on machine A, you can create a subscriber with an ID of 100. On machine A, if you create another subscriber, you must give that subscriber a different ID number, say 200. If you also have an instance of IBFA on a different machine, B for example, you should duplicate the same subscribers with the same ID numbers on machine B.

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

Troubleshooting Subscriber Entries:

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

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

Add Database Connections:

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

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

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

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

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

Step 2: Adding a Global Database Connection:

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

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

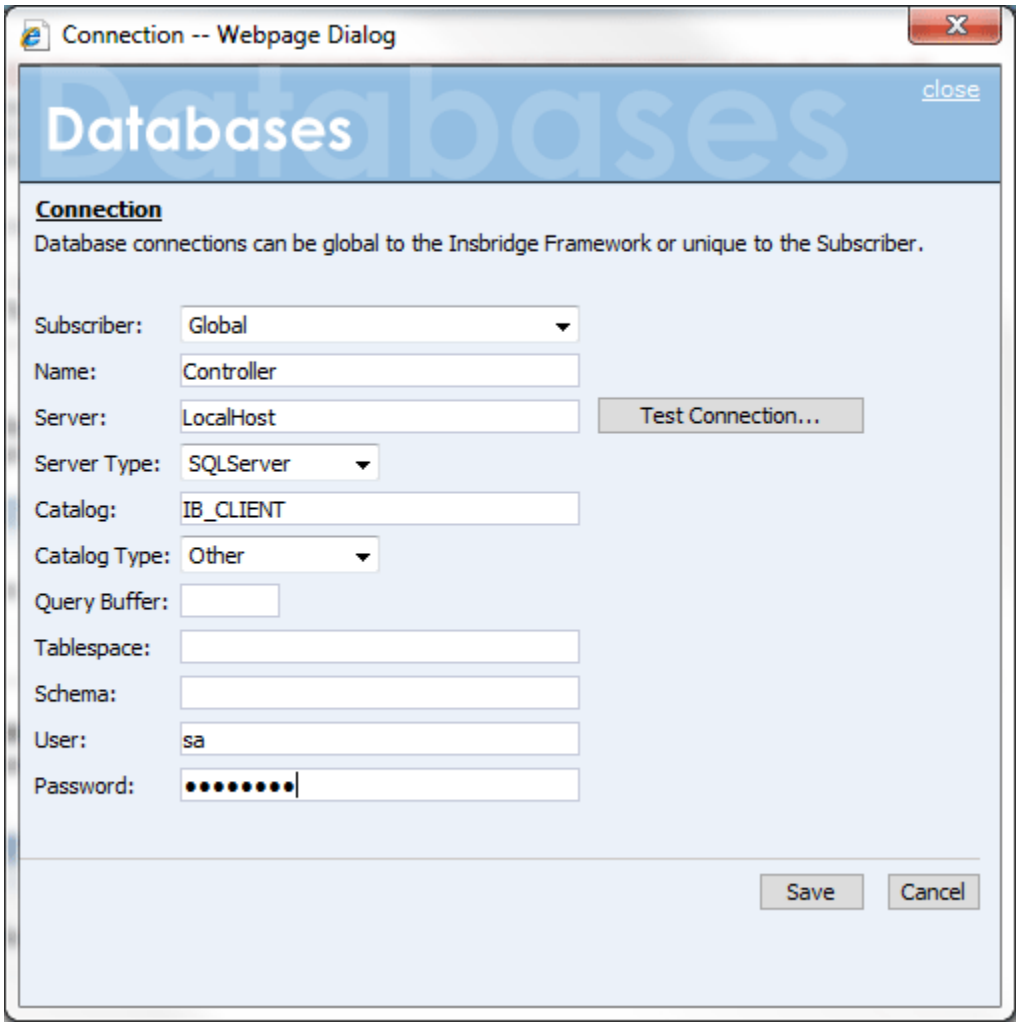


Figure 34 Setting up the Global Database Connection

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

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

4. The **Server** is the database server name or IP address whichever is resolvable by the IBER web server. You also can test the connection and make sure it is valid at the time of entry.

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

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

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

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

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

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

Step 3: Adding a Security Database Connection:

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

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

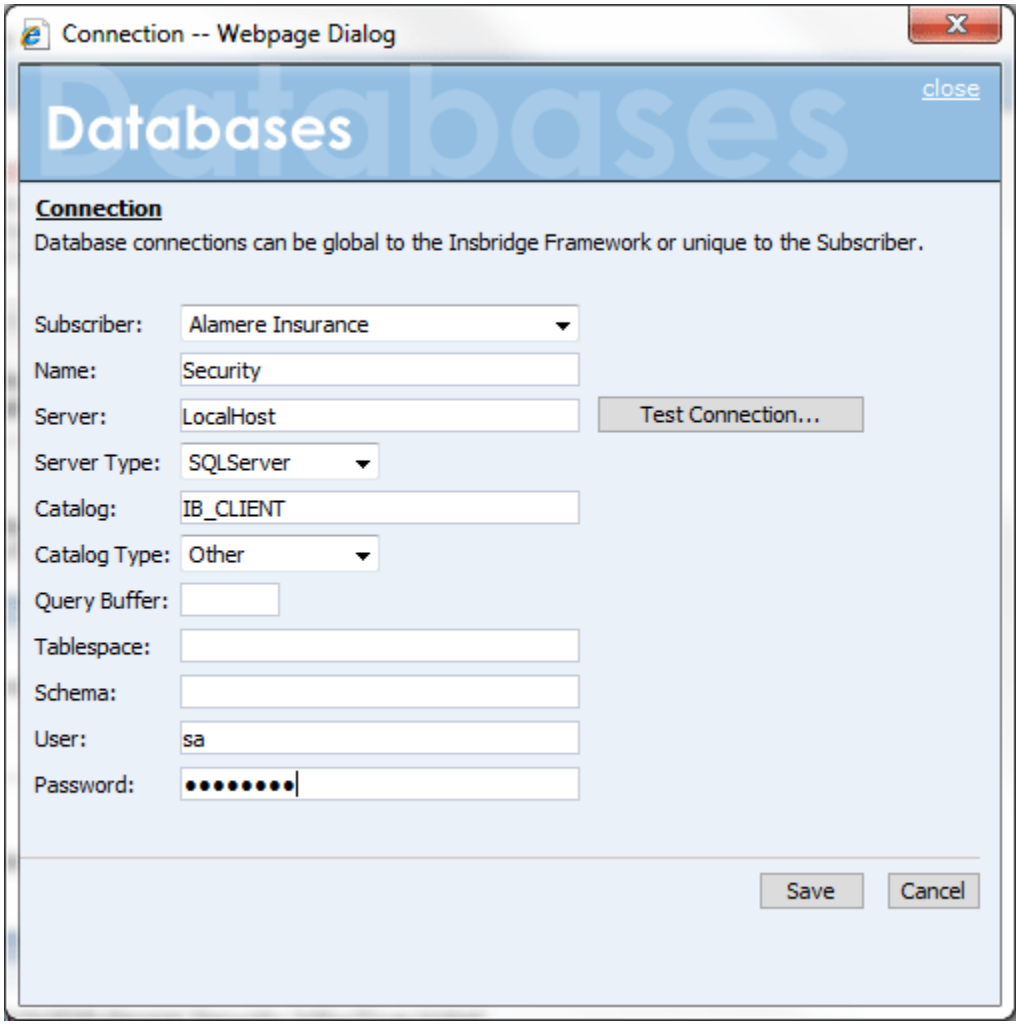


Figure 35 Setting up the Security Database Connection

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

4. The **Server** is the database server name or IP address whichever is resolvable by the IBER web server. You also can test the connection and make sure it is valid at the time of entry.

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

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

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

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

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

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

Step 4: Adding an rm Database Connection:

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

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

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

4. The **Server** is the database server name or IP address whichever is resolvable by the IBER web server. You also can test the connection and make sure it is valid at the time of entry.

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

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

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

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

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

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

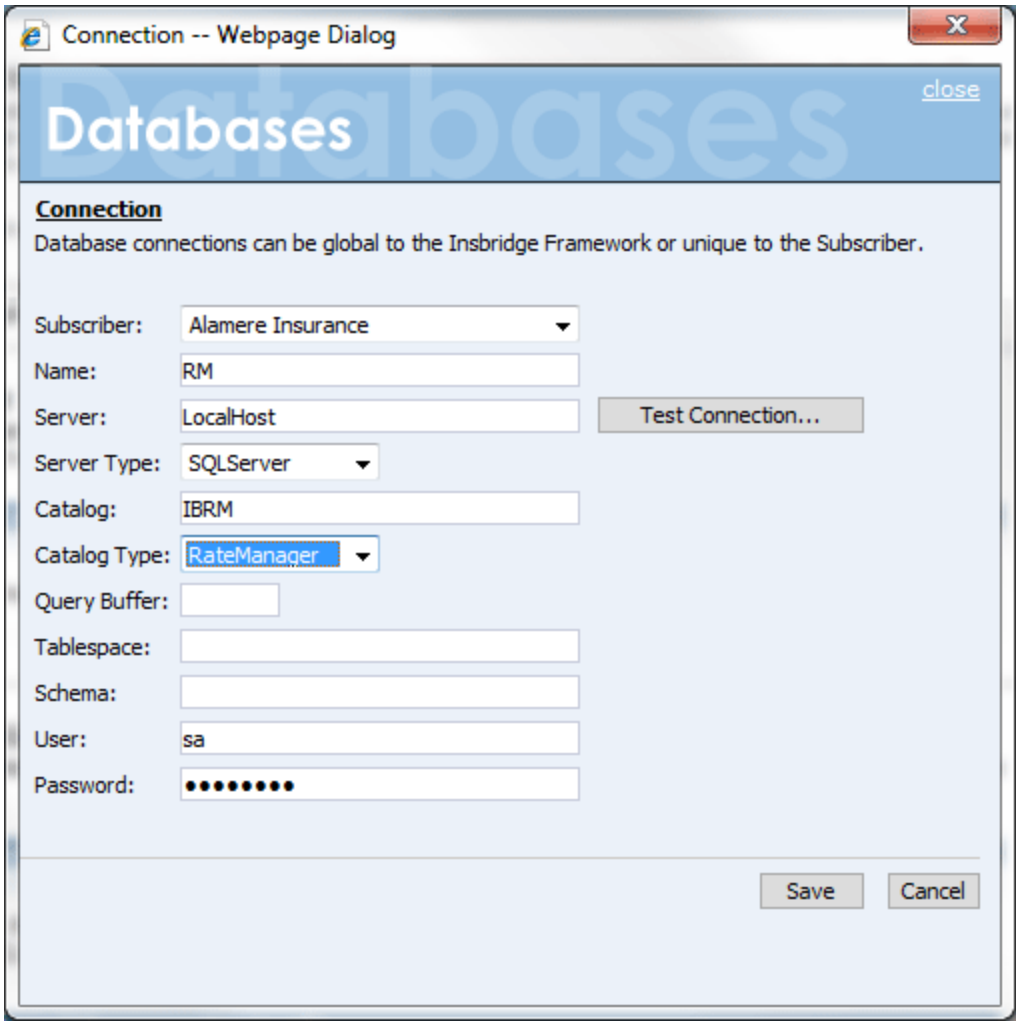


Figure 36 Setting up the RateManager Database Connection

NOTE: *The **Catalog Type** must be set to **RateManager** when you are creating the Connection from RateManager. If you leave it set to Other, you will receive an error.*

Creating Logical Environments:

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

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

- RM: to handle rating and testing.

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

Step 5: Creating a RateManager Environment:

It is recommended that only one RateManager environment be created.

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

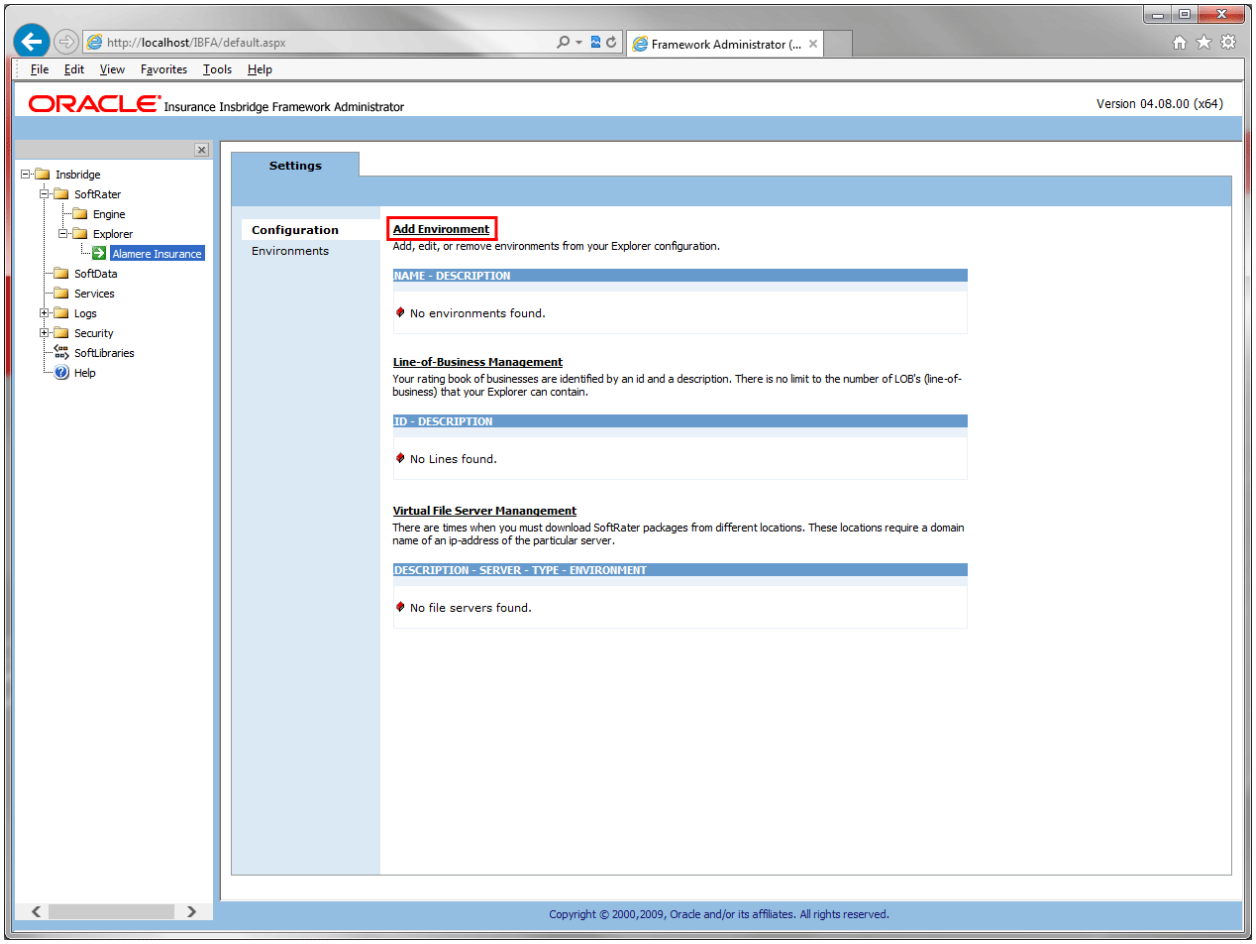


Figure 37 Create a Rating Environment

2. Click on **Add Environment**.

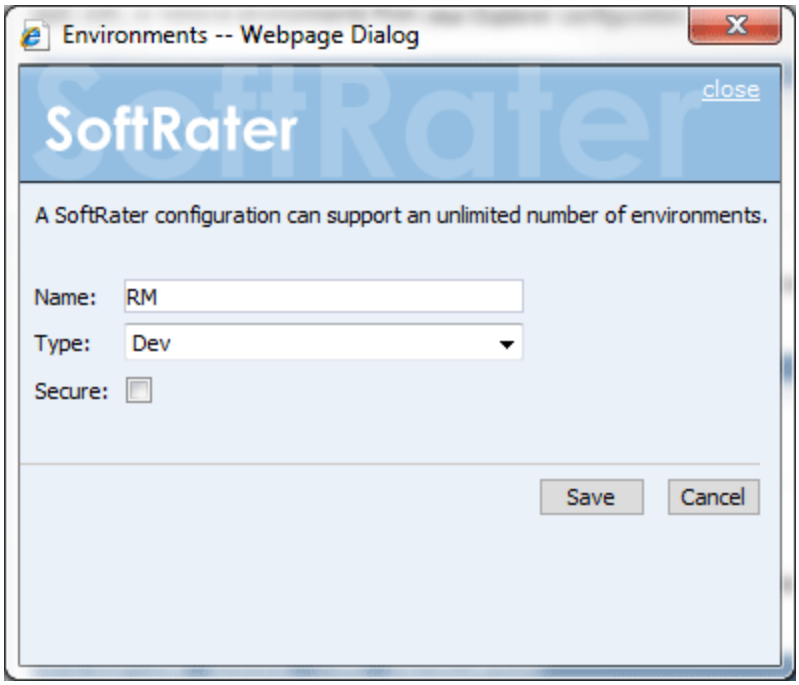


Figure 38 Entering Name and Environment

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

   There are three types of Logical Environments:

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

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

Defining the Logical Environment

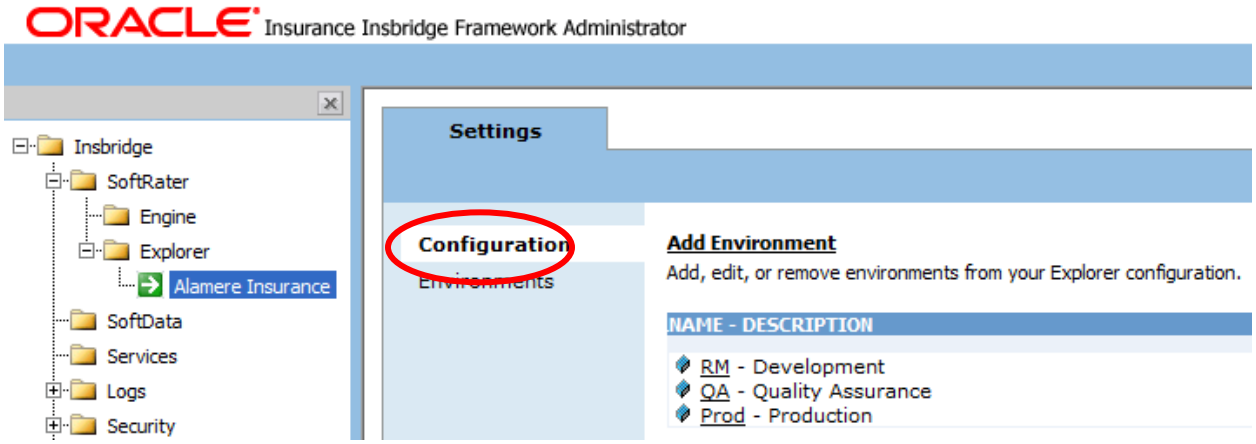


Figure 39 Obtaining Environment Information

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

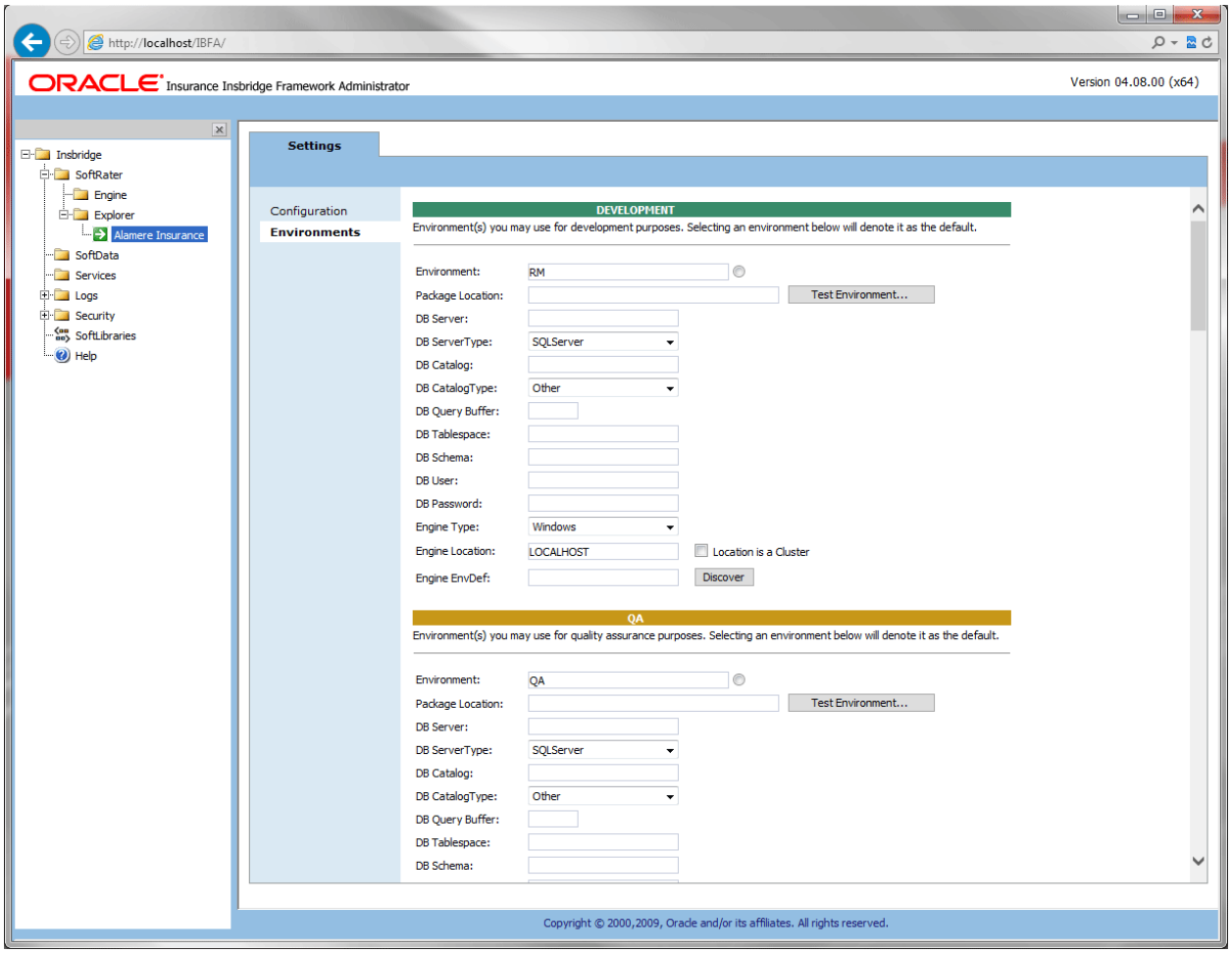


Figure 40 Editing Environment

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

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

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

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

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

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

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

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

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

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

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

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

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

    If you are running a Windows only environment you can set up your SoftRater databases at this time. Follow the same procedure of restoring the database, then entering in IBFA.

Optional Setting: Threads

If you know the number of Web Rate Threads you need, you can enter this information now. If you do not know, you can enter this information later. For more information on threads, please see the IBFA User Guide.

WARNING: Before changing the number of threads, you should consult with your system administrator. Setting the number too high can result in poor performance or even a system crash. If you are unsure of how many threads to use, set the number to 1. For single processor systems, Insbridge recommends a maximum of 2 threads.

There are three thread settings in the IBER system:

- **Batch Packing Thread:** Found on the Preferences screen of RateManager. This setting is the maximum number of threads to be used for RateManager Batch Packaging. Batch packaging is building of packages inside RateManager. This thread setting will not affect rating or any other process in IBFA.

- **IBFA Web Threads:** Found on the SoftRater Engine page in IBFA. This setting is the maximum number of threads to be used for rating that is sent through the SoftRater web services. If you want responses to be returned in the order submitted, this thread setting must be higher than the maximum number of rate requests contained within a single XML request.

- **IBFA Message Services Threads:** Found on the Message Services page in IBFA. Individual thread usage can be set for Batch Rating, Batch Scenario and SoftRater-Package.

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.

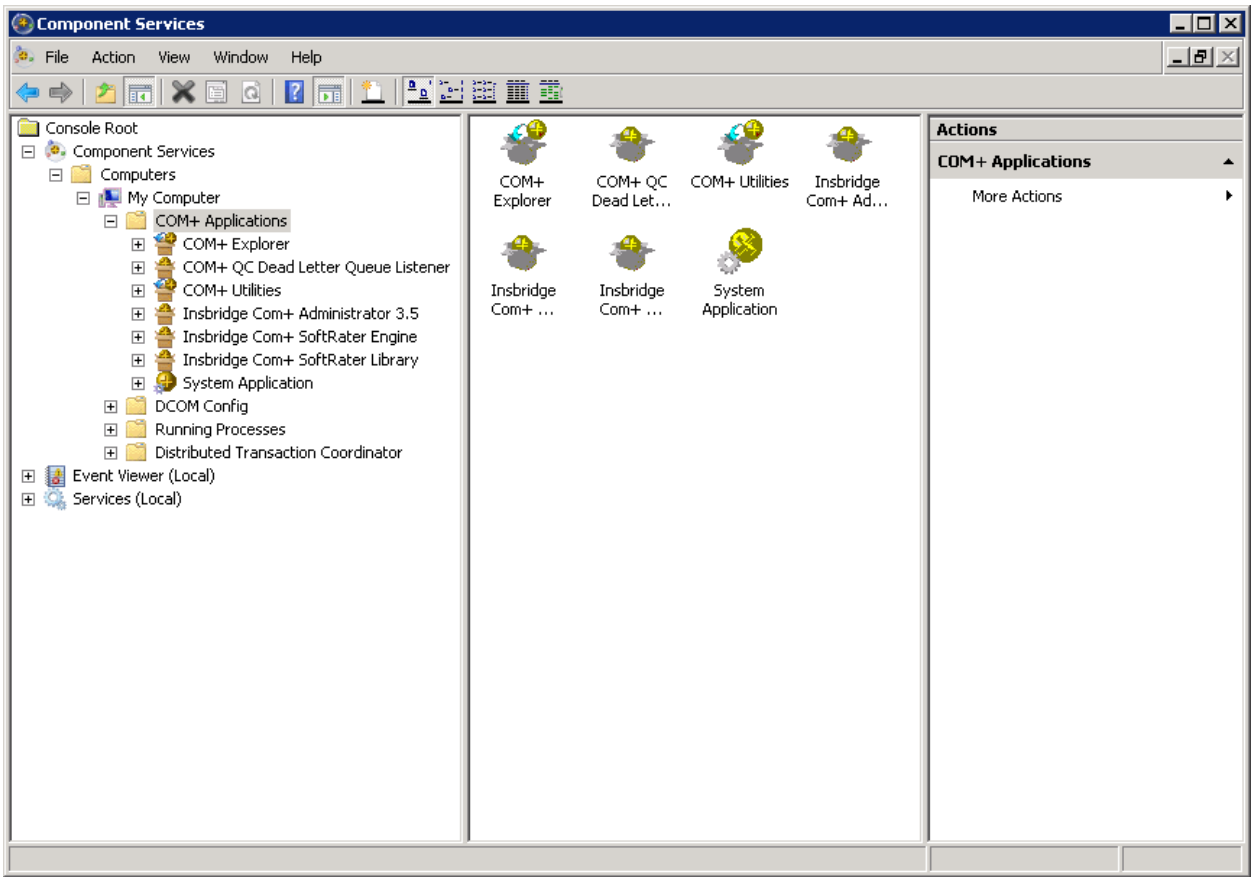


Figure 41 Component Services

There should be 3 Insbridge Com+ Applications libraries:

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

NOTE: *If any COM+ library is missing, run the IBER 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 with Support.*

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.

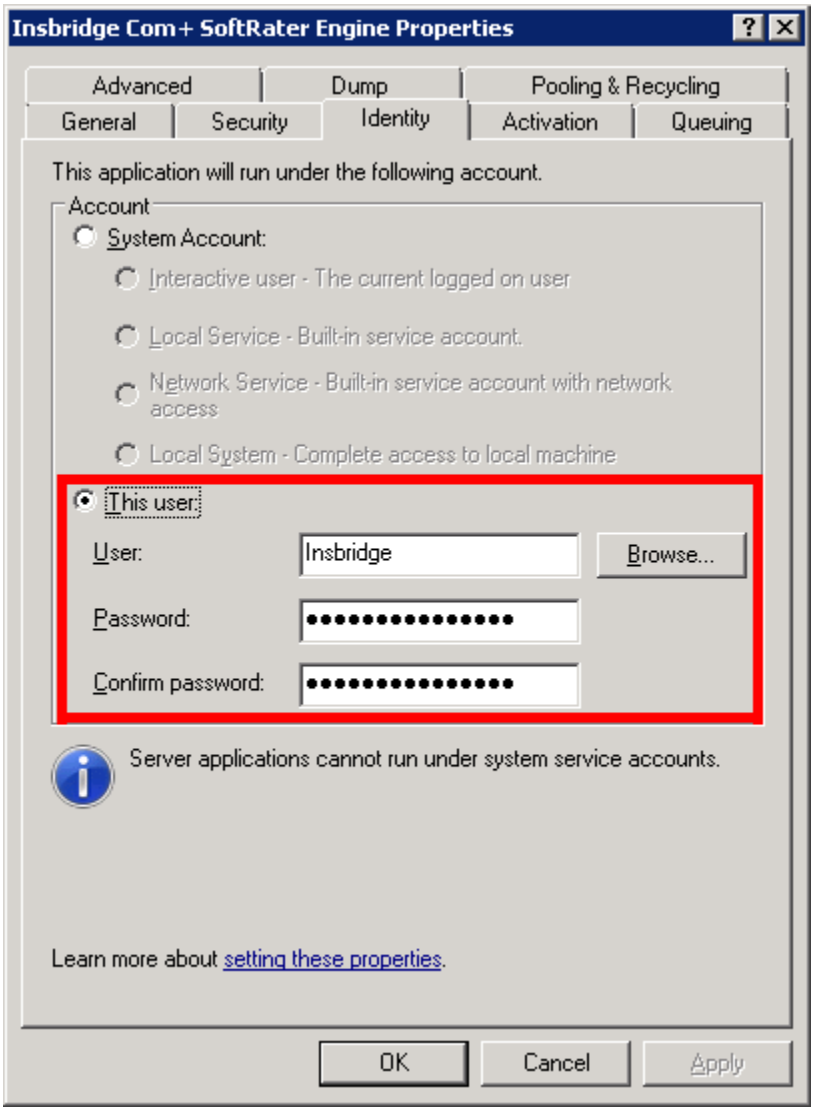


Figure 42 Updating Com Plus to the Insbridge User

5. Repeat for the other com+ services.

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.

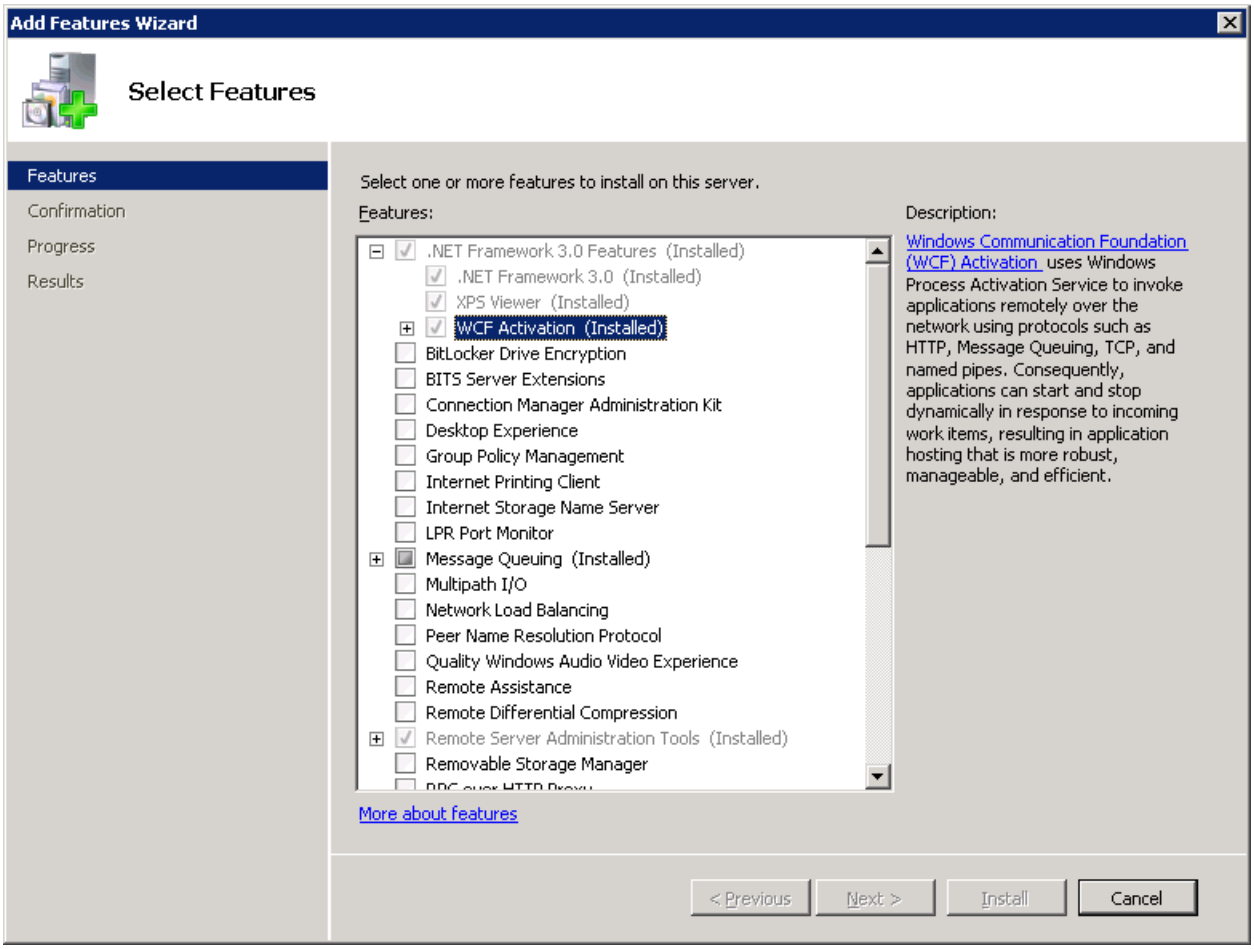


Figure 43 Selecting WCF Activation

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 RateManager or IBFA, you do not need to install this program.

1. Unzip the OBI_PUBLISHER

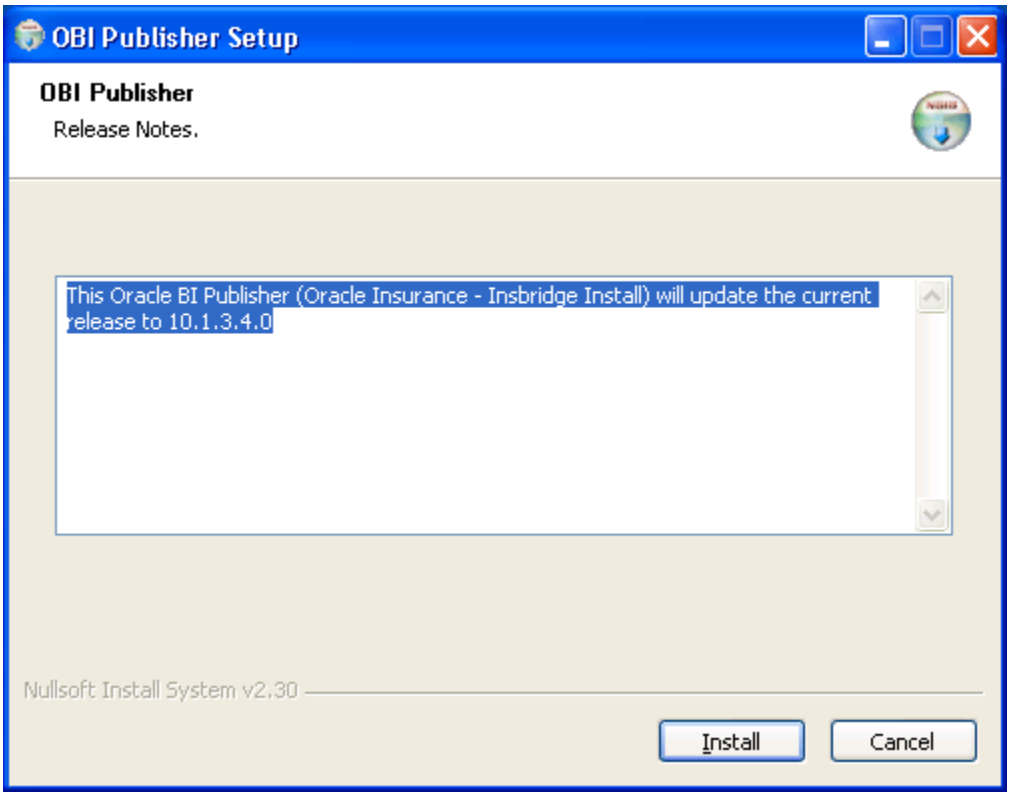


Figure 44 Installing OBI Publisher

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 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.

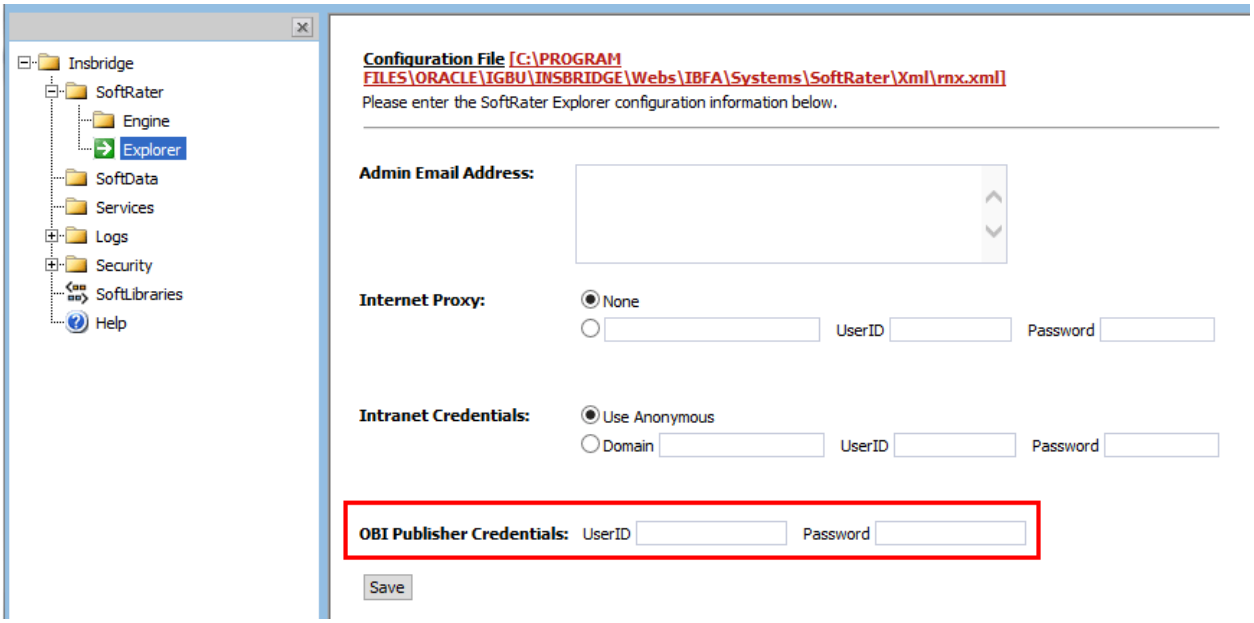


Figure 45 OBI Publisher Credentials

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:9704/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.

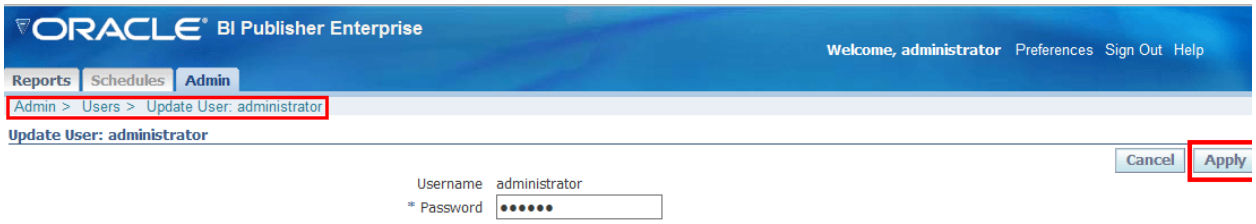


Figure 46 Updating the OBI Publisher Password

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: *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 04.08.xx 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.

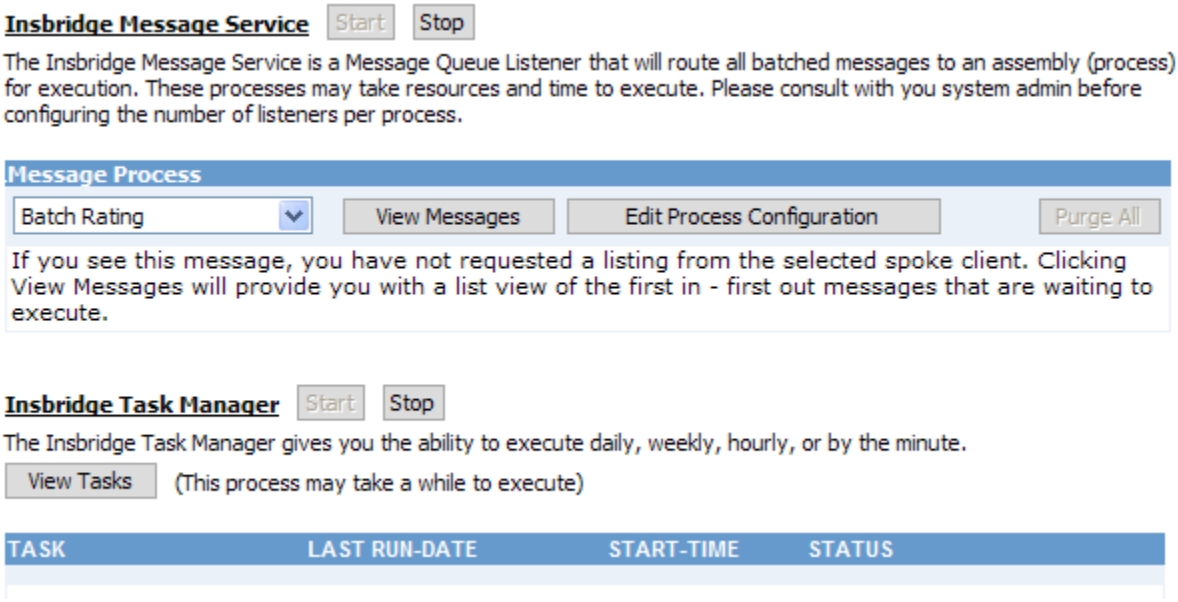


Figure 47 Insbridge Services Screen

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.

STEP 12: PERFORMING UPDATES IN RATEMANAGER

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

- **Step 1:** Running Database Updates
- **Step 2:** Updating Preferences

Entering RateManager:

The URL for RateManager will be http://SERVERNAME/RM. Where the **SERVERNAME** is the server where RateManager was installed.

This places you on the RateManager login screen.

1. To login for the first time, select your company from the drop down menu. If you have created only one company, a drop down menu will not be presented.
2. The user name is demo.
3. The password is password.

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

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

NOTE: *If you are having difficulties logging into RateManager, please check the error logs in IBFA.*

Step 1: Running Database Updates

If you log into RateManager and Tools is the only option, you must perform a database update. After you perform the database updates, to view all menu options, click File→Reload.

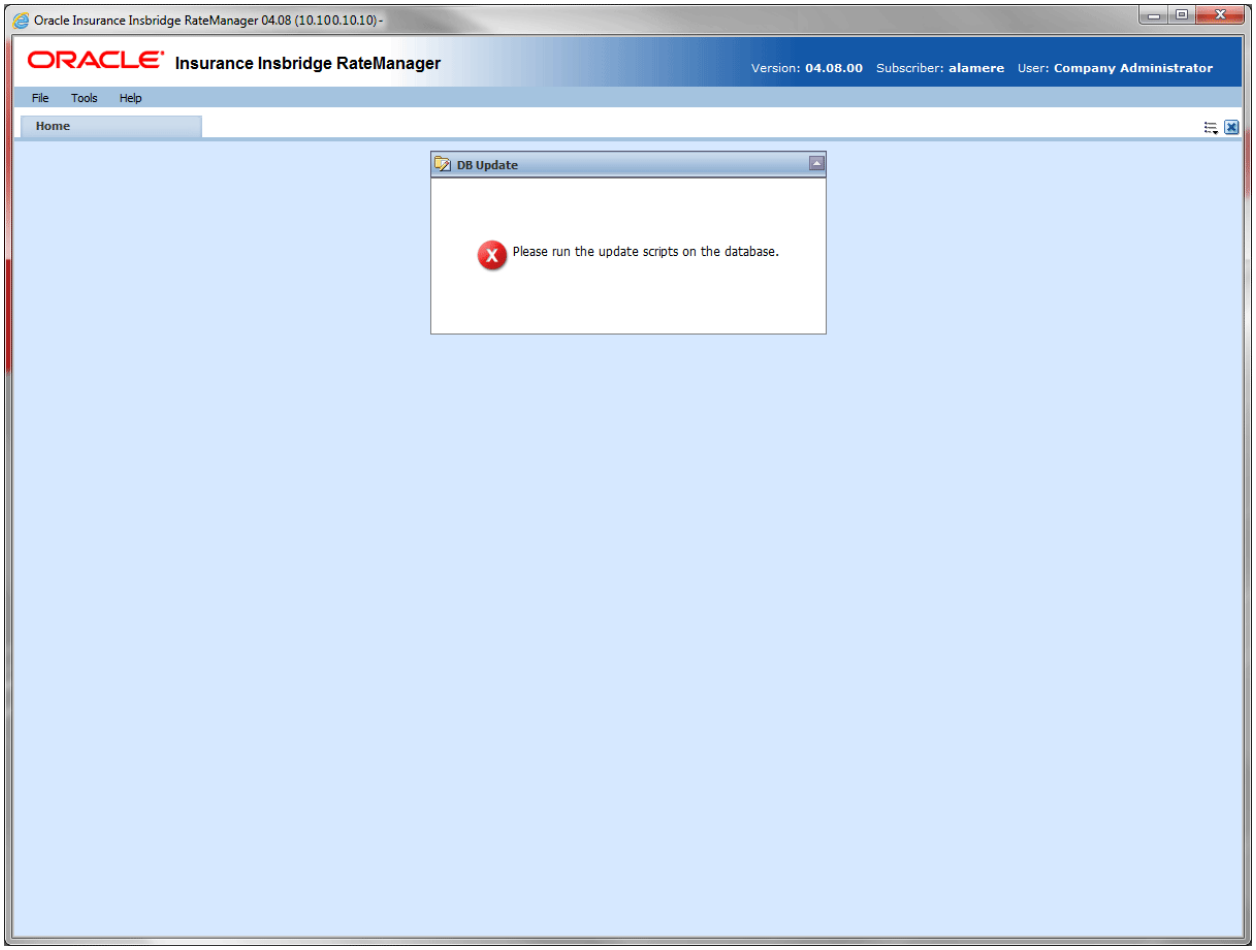


Figure 48 Tool Mandatory Update

NOTE: *If you log into RateManager and Tools is the only option, you must perform a database update.*

On the DB Updates screen, the current version will be highlighted and the status will be *Current*. The updates below the current version will be grayed out. These updates cannot be run again. Current updates can be re-run if necessary. You will receive an error message if you attempt to run a lower version update. Any version update above the current version will also be grayed out but will be available for executing.

New installations may show 04.08.00 as current but still have only the Tools option available. You may have to run the current script again. To see if you have complete access, click File→Reload to refresh the system.

Navigate to the Tools→Database→Updates.

1. The **Updates** tab is displayed. Select the database you want to view from the **Show updates for**

drop down. The database updates for your selection is listed. The last column, the **Status** column, shows you which update is the **Current** one installed.

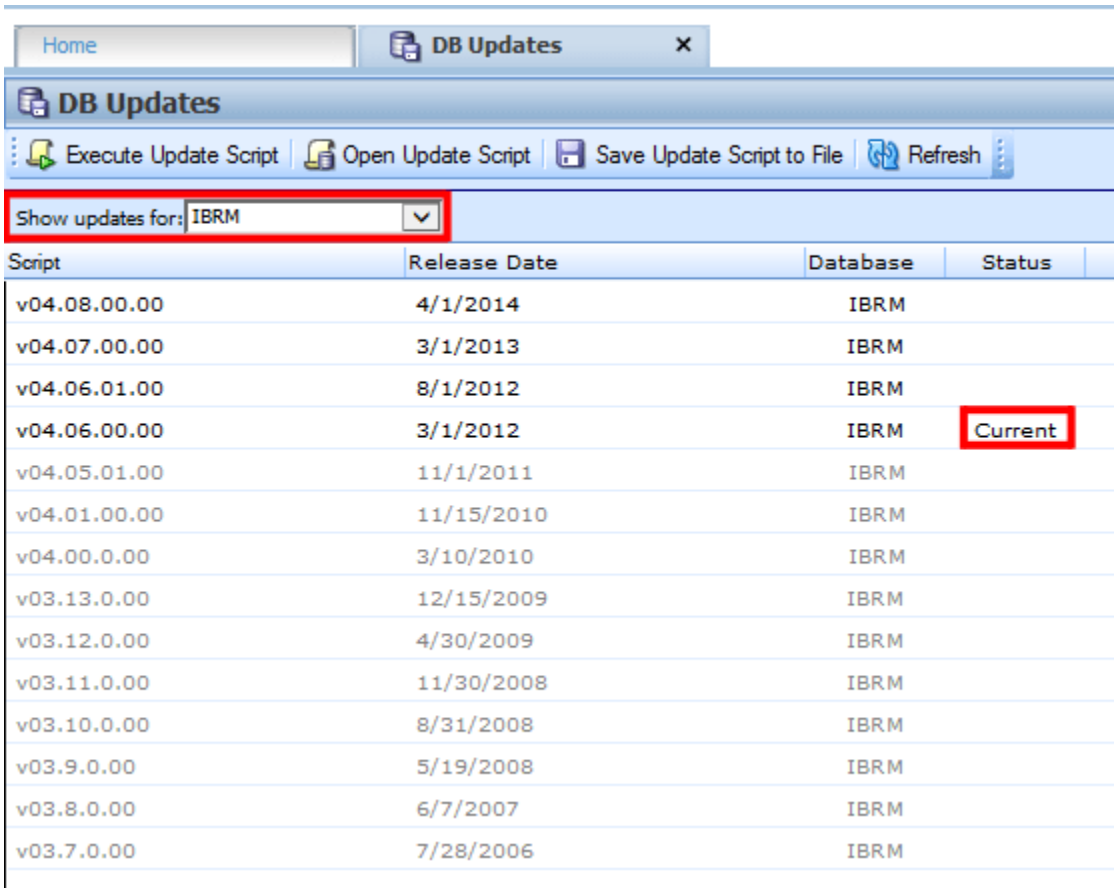


Figure 49 Available Updates

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

Directly in RateManager

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

1. Highlight the update you want to run.
2. Click **EXECUTE UPDATE SCRIPT**. A warning message is displayed.
3. Click **OK** to run the update or **Cancel** to return to the previous screen.
4. Run all script in consecutive order until the 04.08.00 script is showing as current.

5. Do this for both the IBRM database and the IB_CLIENT database.
6. Click File→Reload to refresh the system.

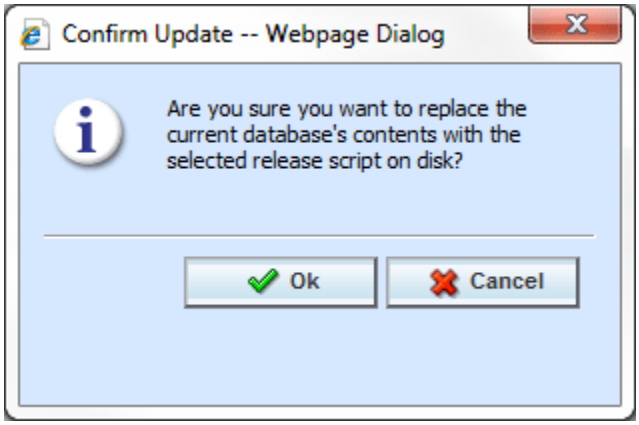


Figure 50 Updating Scripts in RateManager

In SQL Server

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

Step 2: Updating Preferences

Administrators can edit system settings at any time from the Preferences option in RateManager. Changes take place after the user sessions have been ended. If web settings are changed while the users are inside the module, the changes will not be visible to them. Prior to users accessing RateManager for the first time, it is recommended that Preferences be set.

NOTE: *If you receive an error regarding MCSiMenuCtl, please verify that you are using Internet Explorer 8.0 or 9.0 (32-bit). Release 04.08.xx does not support Internet Explorer 8.0 or 9.0 (64-bit).*

Changing System Settings

1. Select Tools→Preferences. This opens the **Preferences** window.
2. Select **System**. This option is displayed only if you are an administrator.

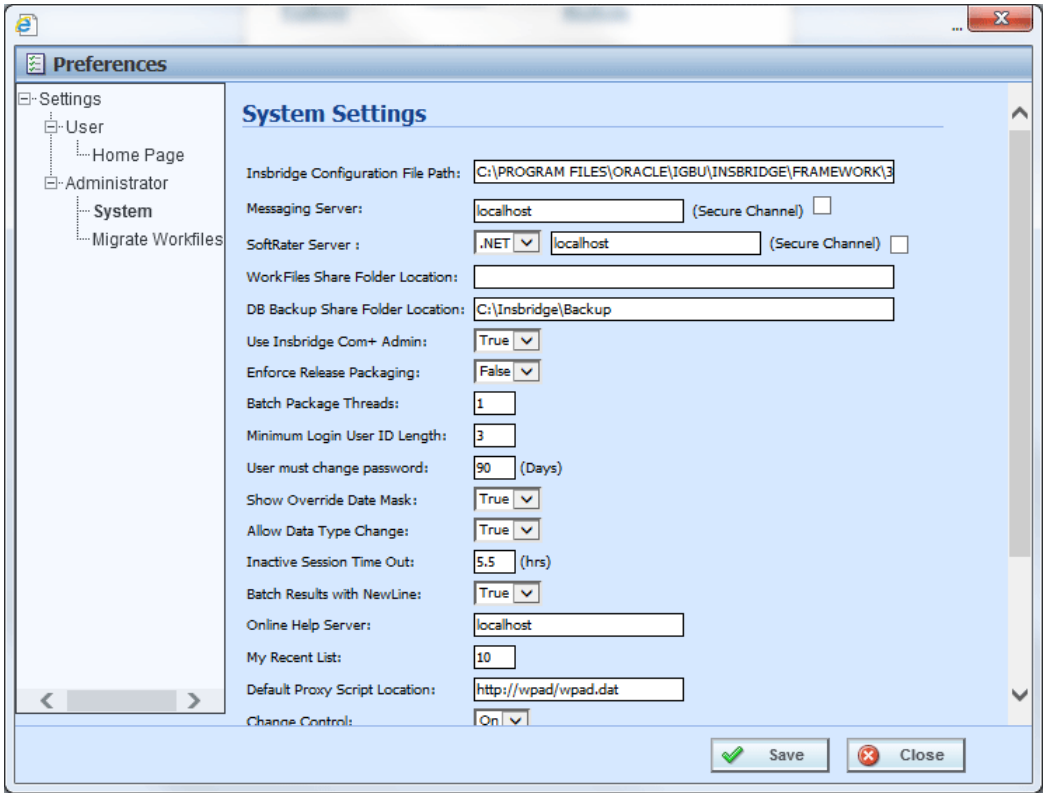


Figure 51 Preferences Settings

3. Make any necessary changes.
4. When you are finished, click **Save** to update your settings. If you want to changes to take place immediately, you may have to end all user sessions.

System Setting Options

Insbridge Configuration File Path

The path of the configuration file found in IBFA. This pathway must match the IBFA path. You may need to change this path if you have changed the path in IBFA. Please contact Insbridge support for further information.

It is strongly recommended that you leave the default.

Messaging Server

RateManager is set up to run batches on the same server that RateManager is located on. If you have an especially large batch to run and you want to batch to a different server, you will have to change server locations here. Unless necessary, it is strongly recommended that you leave the default.

SoftRater Server

If you need to rate on another server, you will have to change server locations here. It is strongly recommended that you leave the default.

Work Files Share Folder Location

A shared Workfiles location allows for multiple instances of RateManager to share the same Workfiles. The IBER server and the shared location must be on the same domain. The Insbridge user must be on the domain also.

For instructions on setting up a WorkFiles Share Location, please see the Insbridge WorkFiles Installation Guide on the http://www.oracle.com/technetwork/documentation/insurance-097481.html

DB Backup Share Folder Location

When you make backups of the RateManager database, you can specify the location of the backup file. If the location is local, use a local path. If the location is not local, you must be a disk admin to change.

If the database is on a remote server, a share is needed for the backup location. The Insbridge user must have write access to this location as well.

Use Insbridge Com + Admin

This setting must always be true. If there is a conflict, please contact Oracle Insurance support.

Enforce Release Packaging

When set to **False**, a release is not required in order for users to create a SoftRater (full) package. False is the default setting.

If set to **True**, a release is required in order for a SoftRater (full) package to be created. If a user wants to create a SoftRater (full) package in the Program Explorer module, a release must be created in the Releases area first. This release must have the program added to it and be unlocked. When the user creates the SoftRater package in Program Explorer, they will have the option to select the Release they want this package to be placed into. If there is no release, or no release that contains that program and is unlocked, then the user will be able to do RateManager (local) packages only.

Batch Package Threads

RateManager allows you to change how many threads are used. Threading enables a process to finish faster by splitting the process into smaller processes that run quasi-simultaneously. On multiprocessor systems, using multiple threads enables the operating system to assign the threads to different processors.

In addition, the Framework Administrator also enables you to change the administrator email address for each client. When a process fails, an email will be sent to the person who initiated the process, as well as to the administrator email addresses listed for the client of that process.

NOTE: ***Before changing the number of threads, you should consult with your system administrator. Setting the number too high can result in poor performance or even a system crash. If you are unsure of how many threads to use, set the number to 1. For single processor systems, Oracle Insurance recommends a maximum of 2 threads.***

Minimum Login User ID Length

This is the minimum number of characters required for a user ID.

User must change password

This where you set the number of days before a user is required to change his/her password. This setting will only be active when you elect to have users change their password on the user setup screen.

Show Override Date Mask

If enabled, a date mask for ‘Date’ data types will be displayed when importing a table. If not enabled, this field will not be visible.

Allow Data Type Change

The type of data associated with a parameter. RateManager supports three (decimal, integer and string) data types for variables and inputs and a fourth (date) for inputs and result variables only.

Setting this option to True allows RateManager users change the data type of a variable or input. Setting this option to False does not allow users to change data types.

Inactive Session Time Out

This is the amount of time that a user sits inactive before being automatically logged out of the system.

Batch Results with New Line

Allows batch results to go to a new line instead of forming one continuous string. A True setting places a carriage return between result files. A False setting results in one continuous string without a break.

Online Help Server

Online help is installed with RateManager. This setting is the default server name where RateManager currently resides. Either a server name or an IP address can be entered here. If needed, you can change the name of the server. For example, if the machine name is not the same as the host name, you may need to change the name in order for online help to function.

My Recent List

My Recent List is a snap setting. Snaps are modules that contain information or links to elements that the user recently worked on. You can set the maximum number of elements to display in a snap. The default is for the snap list to be limited to 10.

Default Proxy Script Location

The Default Proxy Script Location setting may be needed if you elect to use the Oracle Insurance Blog Feed snap. This setting can be used for RSS feeds.

Change Control

If change control is on, it is mandatory for users to enter a change control entry and justification to any element or program when it is revisioned. If change control is off, the option is not presented.

Maximum Amount of Simultaneously Opened Tabs

Use the maximum amount of simultaneously opened tabs setting to set the maximum number of tabs you allow users to have opened in RateManager. The default is 15.

Default Naming Standard

Select the Naming Standard to be applied system. If a Naming Standard is not needed system wide, clear the field. The default is for the system default to be used. Please see Naming Standards for more information.

Enable Worksheet for Test Case Editor

Select true to have the option to create a rating or calculations worksheets in Test Case Editor. Select false and the option to create a worksheet in Test Case Editor is not presented. Please see Worksheets for more information.

STEP 13: EXPORT INSBRIDGE REGISTRY KEY FOR BACKUP

The Insbridge registry key located in HKEY_LOCAL_MACHINE→SOFTWARE→Insbridge is used to store all information for proper encryption of the SoftRater Packages (SRPs). This registry key should be exported to a text file and stored in a safe location off the server.

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

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

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

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

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

Suggested Next Steps

When the IBER system is ready for users, you can begin to create lines of business and create users. End users will need to perform setup on their computers in order view and properly work in RateManager. There is an IE folder in the installation download. In the folder are the executable and the setup guide that users will need.

- **IE7_IE8 Users**
  - Insbridge RateManager Setup Document PDF
  - RateManager_IE7_IE8.exe

After user logins have been created, it is suggested that the contents of the IE folder be sent to users along with their login information.

Chapter 4

MANUAL UPDATES TO THE IBER DATABASES

The preferred method of updating the IBRM and IB_CLIENT databases is to go into RateManager and run the updates there. If the administrator has DB User privileges and is the DB Owner of the database as well as the disk administrator, database updates can be done on the **Tools→Database→Updates** tab. If these privileges are not in place, an error message will be displayed. See Step 1: Running Database Updates for instructions.

NOTE: *If you need to go from an older version, such as 03.13, it is strongly recommended that you enter RateManager and run the script successively starting with 04.00, 04.01, and so on until you reach the 04.08 script. Failure to run scripts in order may result in errors.*

To manually update a SQL Server database, you will be required to save off each update and run them in sequential order in SQL Server. A DBA or a person with the proper permissions will need to apply the database updates in SQL Server using Query Analyzer.

1. Download the update scripts from RateManager.

2. In RateManager, highlight the update you need. Begin with the version that is listed as "current". If you are going from a much lower version of RateManager, you will have to save multiple files.

3. Click **Save Update Script to File**. Your computers dialog box is displayed. **Save** the file to a location of your choice. For IBRM scripts, it is recommended that you rename the file to usp_IBRM_R(version number).sql. For example the Release 04.08.00 update would be: usp_IBRM_R04.08.00.sql. For IB_CLIENT scripts, it is recommended that you rename the file to usp_IB_CLIENT_R0(version number).sql. For example the Release 04.08.00 update would be: usp_IB_CLIENT_R04.08.00.sql.

4. Verify that you have saved all the necessary scripts from "current" to release 04.08.00. You must save off update scripts for both the IBRM and the IB_CLIENT databases.

5. Next, enter SQL Server.

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

NOTE: *When using Database Engine Query, the SQL scripts must run on each individual database.*

6. Begin with the current version of either the IBRM database or the IB_CLIENT database. Open **Query Analyzer**.

7. **Open up the DB script updates** from the download file. You can open in any program you want, such as Notepad. Begin with the "current" script. For example, if you are going from R03.13 to 04.08.00, 3.13 should be "current". Open 3.13 first.

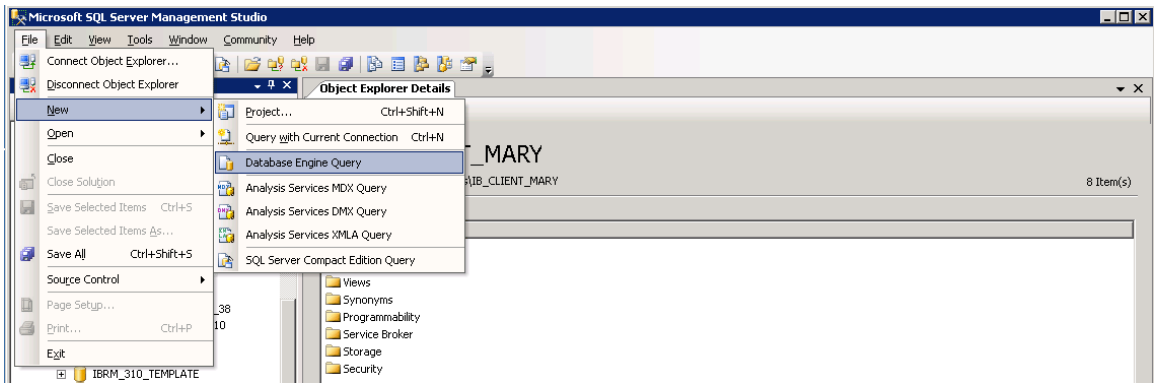


Figure 52 Updating Database

8. Select the database you want to update. In SQL Server Management Studio, create a new Database Engine Query, **File→New→Database Engine Query**.

9. Copy the first update from Notepad and paste onto the query screen.

10. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen. You must run the updates in sequential order. Run each update until you run the 04.08.00 update.

11. When you have finished updating one database, update the remaining database. Make sure you do both the IBRM and IB_CLIENT databases.

12. After the scripts have been run, return to RateManager. Click **Refresh Listing**. The status should show current and the full RateManager menu should be displayed. The updates are now properly applied and users can log back in to the system.

NOTE: *You can view the update script in RateManager. Select the update you want to view. Click **Open Update Script**. The update script will be displayed in a separate screen.*

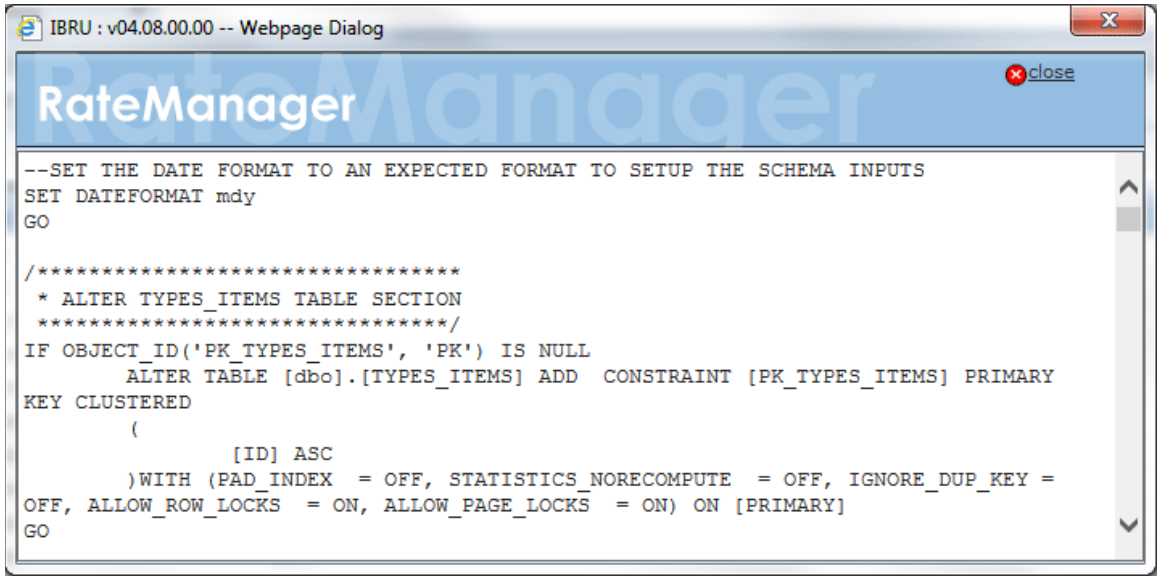


Figure 53 Script Viewer

CONTACTING SUPPORT

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

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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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