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Oracle Insurance

Insbridge Enterprise Rating

IBER Upgrade Guide

Release 4.8

August 2014

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PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating IBER Upgrade 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. The purpose of this guide is to assist with the upgrading of the Insbridge Enterprise Rating System.

There are different types of upgrades available to the 04.08.00 release of the IBER system:

- RateManager/IBFA

- SoftRater for Windows

- SoftRater for WebLogic

- SoftRater for WebSphere

- SoftRater for JBoss

This document focuses on upgrading RateManager/IBFA and SoftRater for Windows. Also included are the steps for upgrading SoftRater for WebLogic, WebSphere, and JBoss.

AUDIENCE

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

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 describes Upgrading an existing environment.

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

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-788-01		May 2011	Initial Release
2nd Edition	P01-788-02	R 4.5.1	September 2011	Update
3rd Edition	P01-788-03	R 4.6	May 2012	Update
4th Edition	P01-788-04	R 4.6.1	November 2012	Update
5th Edition	P01-788-05	R 4.7.0	September 2013	Update
6th Edition	P01-788-06	R 4.7.1	November 2013	Update
7th Edition	P01-788-07	R 4.8	August 2014	Update

SYSTEM UPGRADE REQUIREMENTS

Prior to upgrading an IBER system, please have ready:

- The Insbridge User Account information.

- The location of the current IBER installation.

- The Insbridge User has administrative rights or proper permissions to run an installation and start the Insbridge Message Service and the Insbridge Task Manager Service.

- You must run as Administrator for a Windows 2008 Server upgrade.

- Administrator User name and password for RateManager.

  OR

- Access to the IBER databases. Updates are run against the IBRM and the IB_CLIENT databases. SoftRater databases may not require an update.

NOTE: *Upgrades are performed the same way for either a 32-bit machine or a 64-bit machine. The same permissions and requirements are needed and should already be set up.*

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 Insurance 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
      - o DDLs
      - o Update: usp_IBSR_v04.07.00.db2
  - ♦ Oracle
    - SoftRater**:** IBSR
      - o DDL
      - o Update: usp_IBSR_v04.07.00.oracle
  - ♦ SQL Server
    - RateManager**:** IBRM
      - o Latin1_General_BIN
        - ▪ DATABASE_BACKUP_IBRM_TEMPLATE_CASE_SENSITIVE.bak
      - o SQL_Latin1_General_CP1_CI_AS
        - ▪ DATABASE_BACKUP_IBRM_TEMPLATE.bak
    - Security**:** IB_CLIENT
      - o SQL_Latin1_General_CP1_CI_AS
        - ▪ DATABASE_BACKUP_IB_CLIENT_TEMPLATE.bak
    - SoftRater**:** IBSR
      - o Latin1_General_BIN
        - ▪ DATABASE_BACKUP_IBSR_TEMPLATE_CASE_SENSITIVE.bak
      - o SQL_Latin1_General_CP1_CI_AS
        - ▪ DATABASE_BACKUP_IBSR_TEMPLATE.bak
      - o Update: usp_IBSR_v04.05.01.sql
      - o Update: usp_IBSR_v04.06.00.01.sql
      - o 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**

The 04.08.00-Insbridge-jboss folder contents:

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

The 04.08.00-Insbridge-was folder contents:

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

The 04.08.00-Insbridge-wbl folder contents:

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

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

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. Be aware that re-installing the application may also reset security settings in IBFA.

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.

Application Server Permissions

WebLogic, WebSphere, and WebLogic require read/write permissions on the server and the application to create Insbridge specific folders, edit configuration files, and write log files.

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.*

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.

Recommended SoftRater Permissions:

The recommended permissions are required for new tables to be created in the SoftRater (IBSR) database dynamically when or if a new line of business SRP (SoftRater Package) is loaded to the SoftRater system. If the recommended permissions are not possible, manual steps will need to be performed that will allow for packages to be loaded.

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

- **Insbridge SoftRater SQL Server Database**.

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

- **Insbridge SoftRater Oracle Database**.

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

- **Insbridge SoftRater DB2 Database**.

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

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

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

Microsoft SQL Server

JDBC Driver Class

"com.microsoft.jdbc.sqlserver.SQLServerDriver"

Supported Versions – 2005 SP/2 and 2008 R2

User Account Requirements

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

Oracle

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

JDBC Driver Class

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

Supported Versions – 10g, 11g

User Account Requirements

Create Table
Create Index
Query access to "SYS.OBJ$"

IBM DB2

SoftRater database schema is supported on version 9.5.

JDBC Driver Class

"com.ibm.db2.jcc.DB2Driver"
For Native AS400 – "com.ibm.as400.access.AS400JDBCDriver"

Supported Version – 9.5

User Account Requirements

Connect to database
Create Table
Create Packages
Query access to "SYSIBM.SYSTABLES"

Configuration Settings

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

Recommended

The query dynamics of the SoftRater system will benefit from the following modification to Configuration settings.

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

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

UPGRADING RATEMANAGER, IBFA AND SR-WIN

The machine where Insbridge is located needs to be rebooted prior to upgrading. Rebooting is necessary to assure that com+ settings are properly updated, Insbridge services are properly stopped and all users are logged off.

Windows should be up and running prior to upgrading.

This update takes RateManager and the corresponding IBFA from 4.0 or later to release 04.08.00.

Steps to Upgrade RateManager/IBFA:

Every upgrade requires:

- **Step 1:** Reboot system
- **Step 2:** Run the IBER exe to update the application.
- **Step 3:** Start Insbridge Message Service.
- **Step 4:** Login to RateManager and perform IBER database updates.
- **Step 5:** Update Preferences.

NOTE: *Updates can be performed manually, if desired. Manual updates are performed directly in SQL Server.*

Additional Step to Upgrade RateManager/IBFA:

You will need to run this step if you are currently running release 4.7.0 or previous:

This step updates the OBI Publisher in RateManager and the corresponding IBFA from 4.7.0 or previous to release 04.08.00 and assures that OBI is available to users.

- **Step 1:** Enter OBI Security Information

Additional Step to Upgrade RateManager/IBFA:

You also will need to run this step if you are currently running release 3.13.7 or previous:

This procedure takes RateManager and the corresponding IBFA from 3.13.7 or previous to release 04.08.00 and assures that previous workfiles are available to users.

- **Step 1:** Migrate Workfiles.

Steps to Upgrade SoftRater for Windows from a Previous Release:

This procedure takes a SoftRater for Windows node from a previous version to release 04.08.00. This setup must utilize SQL Server.

- **Step 1:** Reboot system
- **Step 2:** Run the IBER exe to update the application.
- **Step 3:** Start Insbridge Message Service.
- **Step 4:** Run the required SQL script manually on the SQL Server database. SoftRater database updates are not available from RateManager.
- **Step 5:** Update Preferences. Make any updates to Preferences at this time.

Additional Step to Upgrade SoftRater for Windows from a Previous Release:

You will need to run this step if you are currently running release 4.7.0 or previous:

This step updates the OBI Publisher in SoftRater for Windows node from 4.7.0 or previous to release 04.08.00 and assures that OBI is available to users.

- **Step 1:** Enter OBI Security Information

UPDATING AN INSBRIDGE APPLICATION

Every upgrade requires:

- **Step 1:** Reboot system
- **Step 2:** Run the IBER exe.
- **Step 3:** Start Insbridge Message Service.
- **Step 4:** Login to RateManager and perform IBER database updates.
- **Step 5:** Update Preferences.

NOTE: *Updates can be performed manually, if desired. Manual updates are performed directly in SQL Server.*

This procedure takes RateManager and the corresponding IBFA from 4.0 or later to release 04.08.00.

STEP 1 – REBOOT SYSTEM

The machine where Insbridge is located needs to be rebooted prior to upgrading. Rebooting is necessary to assure that com+ settings are properly updated, Insbridge services are properly stopped and all users are logged off.

Windows should be up and running prior to upgrading.

If the Insbridge Message Service is set to automatic, you must stop the service prior to running the install. Failure to stop the Insbridge Message Service may result in the upgrade not completing properly.

Failure to Shut Down Com + Services:

Failure to shut down Com + Services may result in a configured identity error message when users access RateManager. Users may receive an error message that an incorrect username and password are being used or remote access is not allowed.

To correct reboot the server where the IBER System was installed. When Windows is up and running, run the IBER executable to remove the IBER system. Rerun the IBER executable again to re-install.

To verify Com+ was updated, enter Com+ and verify the Identity of each of the Insbridge Com+ Services is the Insbridge user. The Identity can be found on Properties->Identity.

NOTE: *The Insbridge Com plus services are started when users access the system.*

Failure to Shut Down Insbridge Message Service:

Failure to shut down the Insbridge Message Service may result in an error message being displayed during installation and failure to completely install the required Insbridge executable. The best way to ensure the Insbridge Message Service has completely shutdown is to reboot the system.
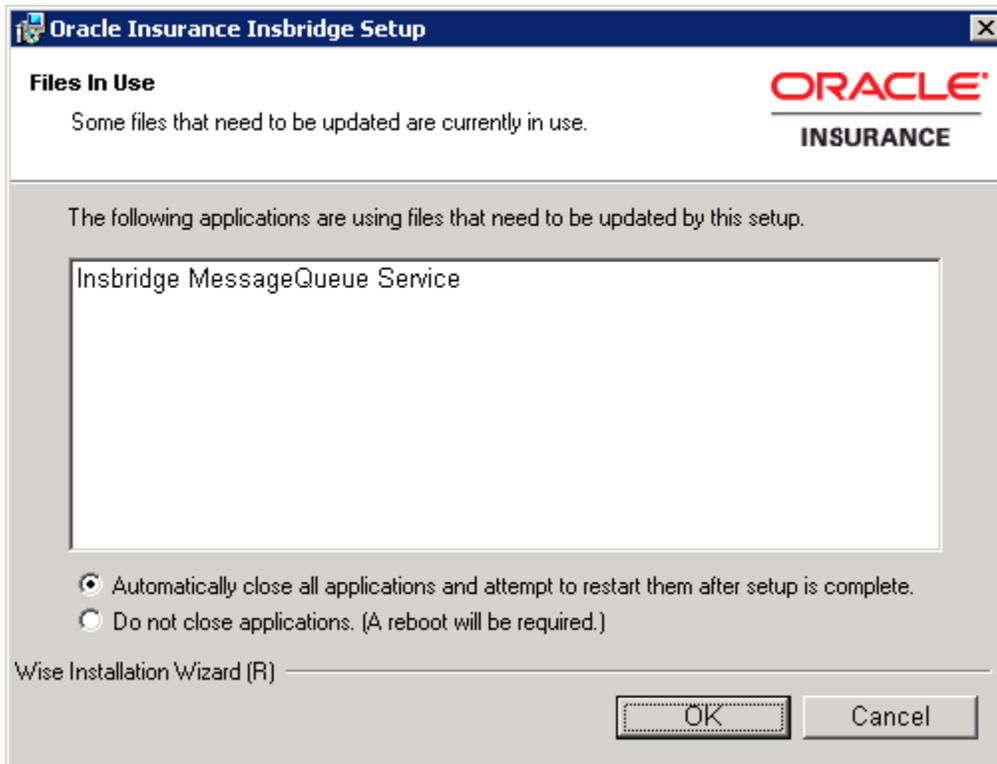
Figure 1 Insbridge Message Service Running During Update

Failure to Use Correct Install Package:

Failure to run the correct installation package will result in an error message. To correct, download the installation package for the machine you have.
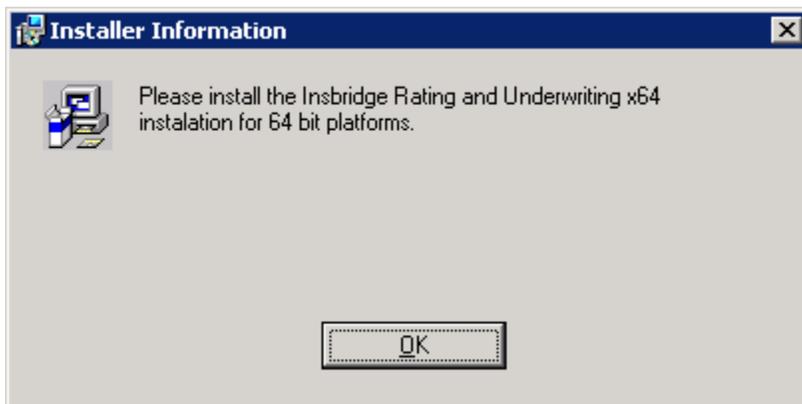
Figure 2 Failure to User Correct Install Package

STEP 2 – RUNNING THE IBER APPLICATION

An update to the IBER system is run from the **Oracle Insurance – Insbridge Enterprise Rating.exe**. Unzip the IBER folder on the machine where the IBER system (IBFA and RateManager) is currently installed.

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

2. Open the Oracle Insurance – Insbridge Enterprise Rating file. A Welcome screen is displayed.
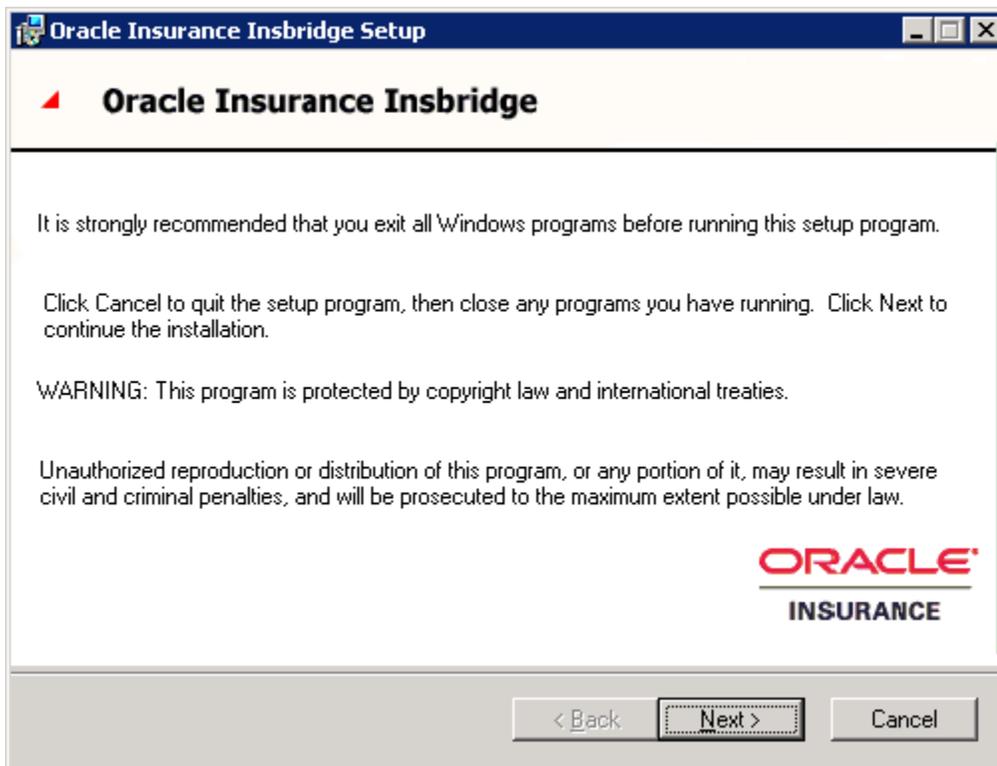
Figure 3 Installing Insbridge

3. Click on **Next** to continue.
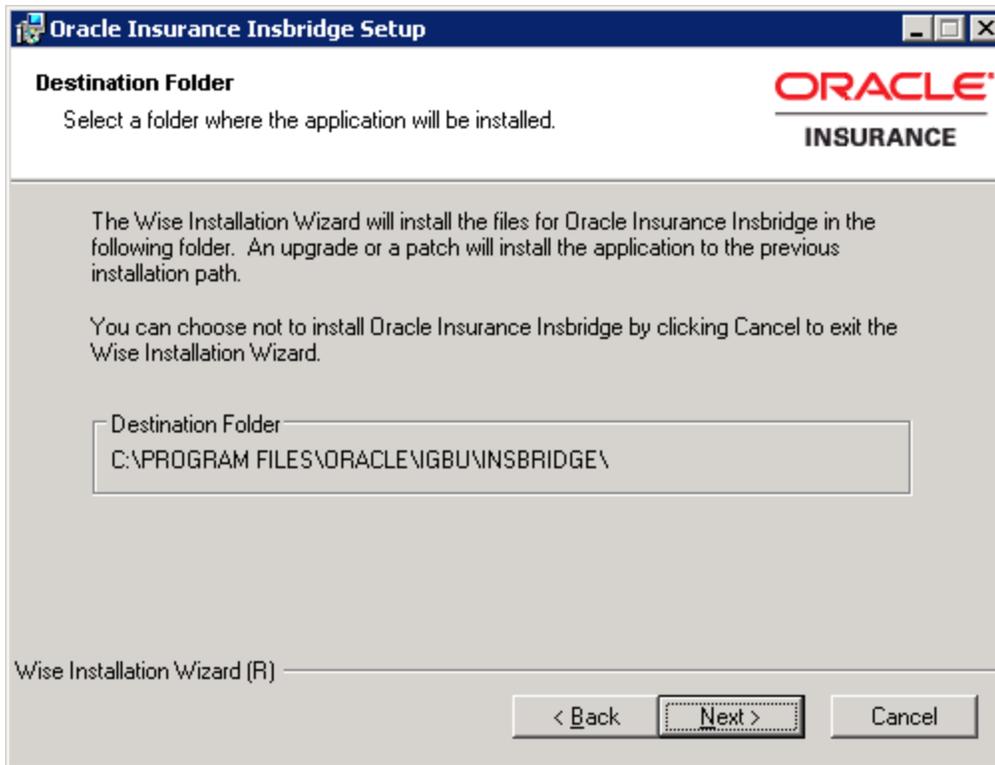
Figure 4 Destination Location for Update

4. The destination path is displayed next. This is an information only screen. No changes are allowed. Click **Nex**t.
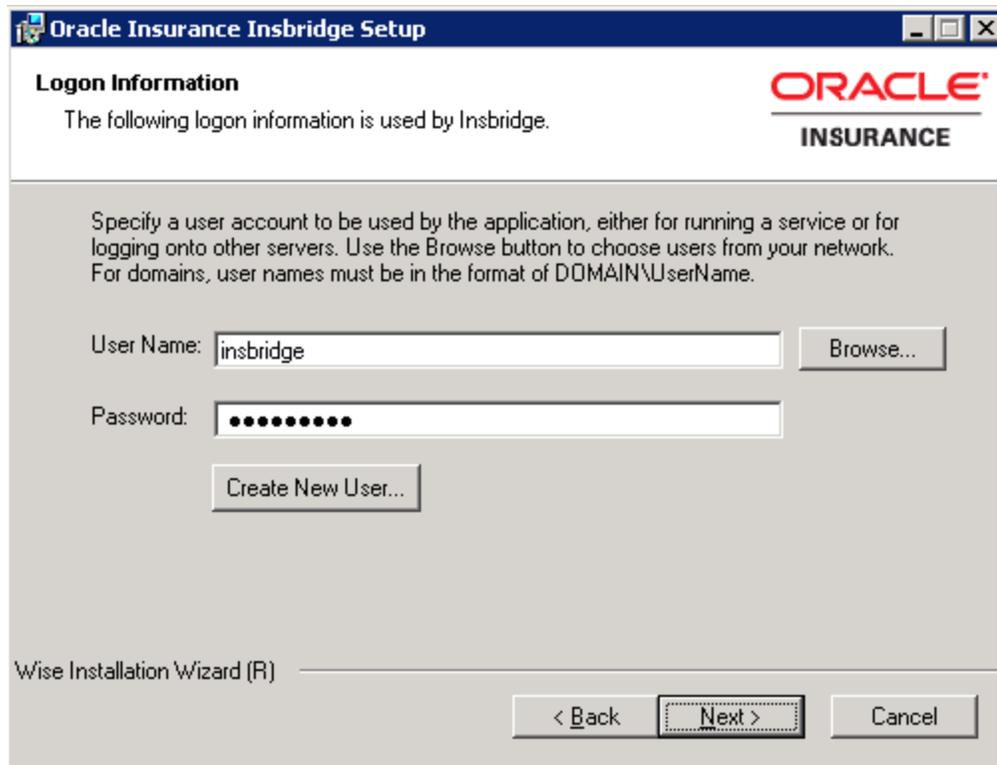
Figure 5 Entering User Information for Insbridge

5.   The next screen is the Logon Information screen. Please use the Insbridge user account information that you set up for the initial installation. Click **Next** to continue.
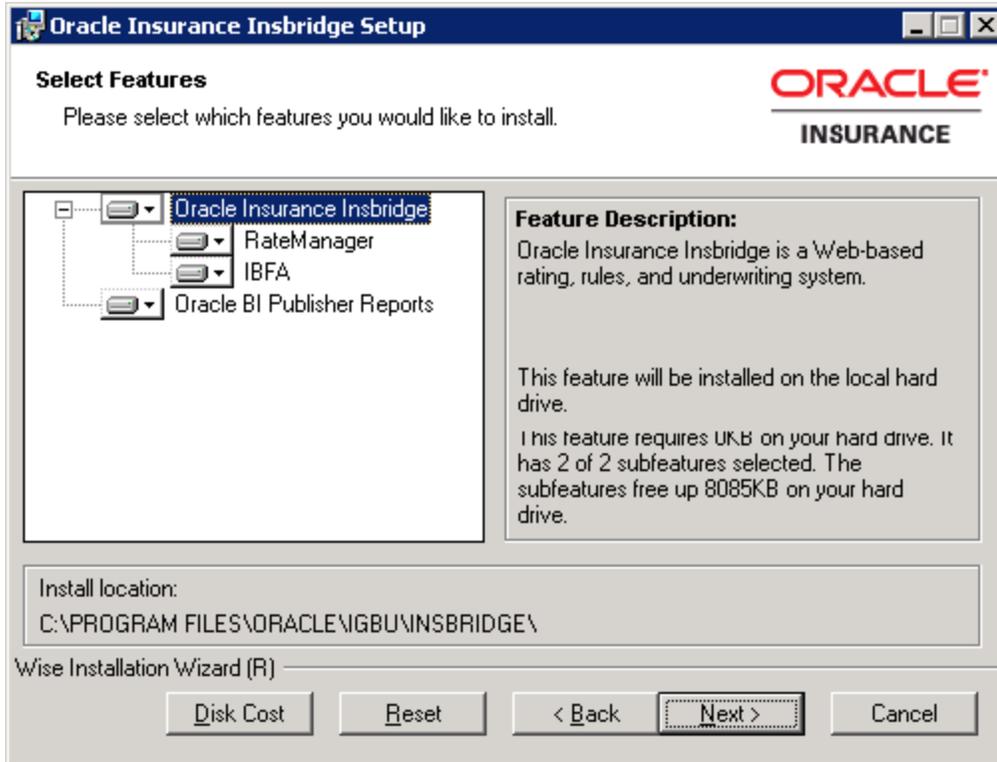
Figure 6 Selecting Features to Install

6. 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**.

Options are:

- **Oracle Insurance Insbridge**:
  - 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.

NOTE: Do not install this option for SoftRater for Windows (SoftRater Node) updates.

- **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.
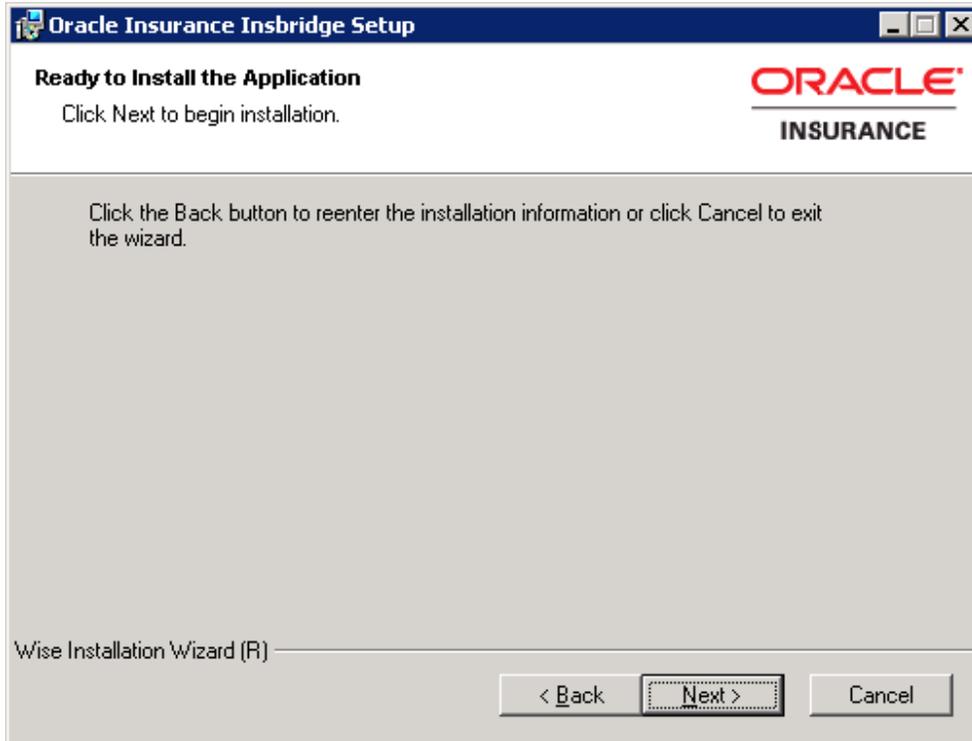
Figure 7 Ready to Install

7. A Ready to Install screen is displayed. If you are ready, click **Next**. Otherwise click Back to check the options you want to install. A progress screen displays your progress.
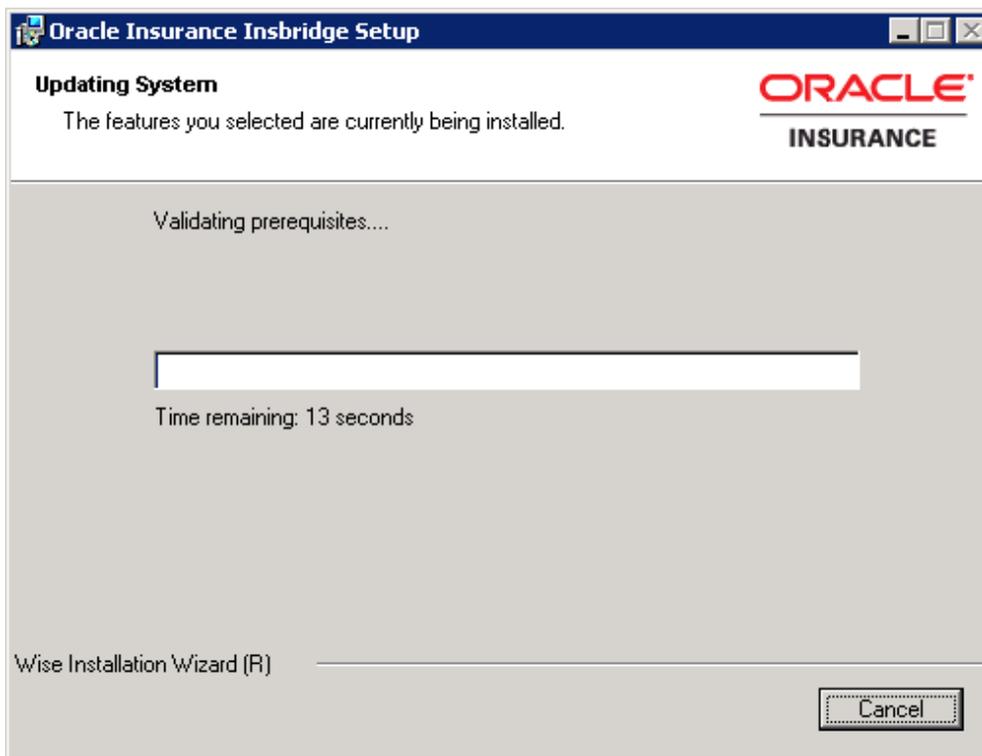
NOTE: *If you receive a message that the system will need to be rebooted after the installation, **STOP THE INSTALLATION**. This message means that the Insbridge Com + services are running. If you get this message:*

1. Stop the Installation.

2. Reboot the server.

3. Start the Installation over.

4. If the Insbridge Message Service is set to automatic, you must stop the service prior to running the install.

8.   When complete, a ReadMe Information screen is displayed.
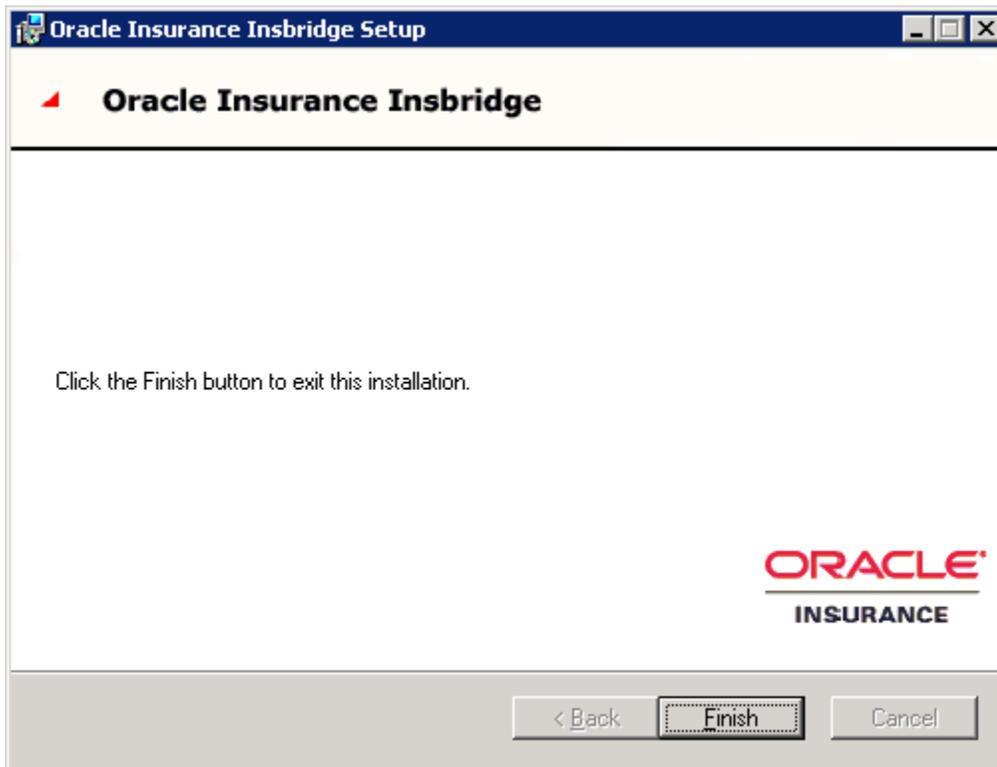
Figure 8 Completed Installation

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

STEP 3 – STARTING INSBRIDGE SERVICES

The Insbridge Message Service can be started on the server where Insbridge is installed or from the Services screen in IBFA.

To start on the server go to Services and select to start Insbridge Message Service.

To Start in IBFA:

Insbridge Message Service Start Stop

The Insbridge Message Service is a Message Queue Listener that will route all batched messages to an assembly (process) for execution. These processes may take resources and time to execute. Please consult with you system admin before configuring the number of listeners per process.

Message Process

| Batch Rating | View Messages | Edit Process Configuration | Purge All |

If you see this message, you have not requested a listing from the selected spoke client. Clicking View Messages will provide you with a list view of the first in - first out messages that are waiting to execute.

Insbridge Task Manager Start Stop

The Insbridge Task Manager gives you the ability to execute daily, weekly, hourly, or by the minute.

View Tasks   (This process may take a while to execute)

| TASK | LAST RUN-DATE | START-TIME | STATUS |

Figure 9 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.

It is recommended that you also start the Insbridge Task Manager. 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.

NOTE: *A login screen is displayed on IBFA for new installs. An upgrade does not reset the current security setting. For example, if a login was not required for IBFA, upgrading to release 04.08.00 will not change that.*

STEP 4 – UPDATING DATABASES

Database updates can be performed in RateManager for the IBRM and IB_Client databases. This is the recommended way to update these databases. If this is not possible, the SoftRater database can be updated manually on the machine where they are located.

The SoftRater database needs to be updated manually on the machine where it is located.

To update the RM and IB_Client databases, log into RateManager.

NOTE: *You must be a DB Owner to run the update scripts in RateManager.*

NOTE: *SoftRater update scripts must be run manually. See Manual Updates to the IBER Databases for more information.*

Updating Databases in RateManager

The URL for RateManager will be http://INSTALLATIONSERVERNAME/RM. Where Installation server is the server where RateManager was installed. This places you on the RateManager login screen.

If you log into RateManager and Tools is the only option, you must perform a database update.
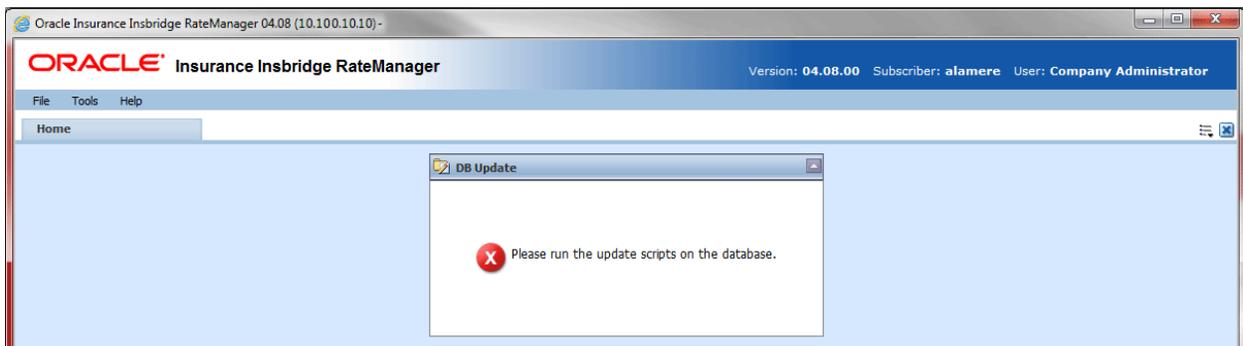
Figure 10 Tool Mandatory Update

1. Enter your username and password.

2. Navigate to the **Tools→Database→Updates**.

   On the DB Updates screen, the current version is highlighted and the status is *Current*. The updates below the current version are grayed out. These updates cannot be run again. 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.

   Updates have to be installed sequentially, meaning if you are on Version 03.13, you must run the 04.00 update, the 04.01 update, the next, and finally the 04.08.00 update. If you attempt to run an update that is more than one level above the current version, you will receive an error message.

3. 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 are listed. The last column, the **Status** column, shows you which update is the **Current** one installed.
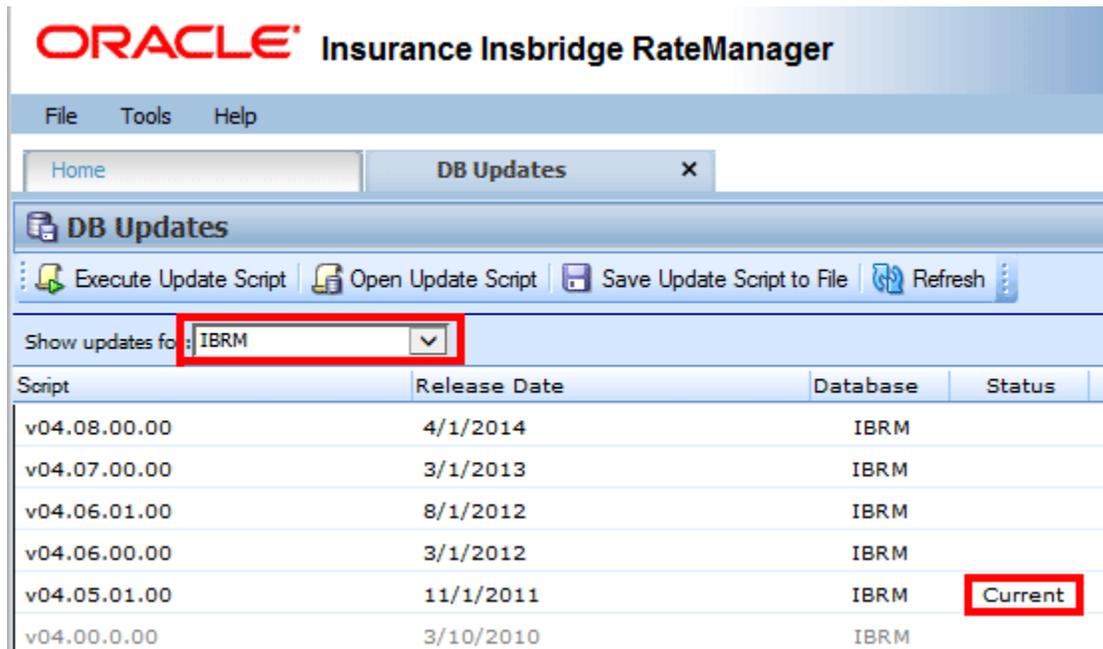
Figure 11 Available Updates

4. 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 has 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.
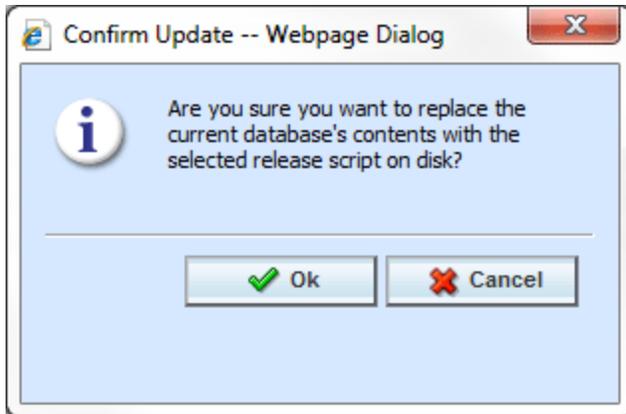
Figure 12 Updating Scripts in RateManager

6. Click File→Reload to refresh the system

In SQL Server

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

After you perform the database updates, to view all menu options, click File→Reload.

Updating a SoftRater for Windows Database

For release 04.08.00 SoftRater for Windows requires an update. The SQL database update file is located in the IBER download→Database→SQL Server→SoftRater – IBSR→Update folder. There are three updates scripts.

- Upgrading from release 04.07.00 requires one update script be run, usp_IBSR_v04.08.00.00.sql.
- Upgrading from release 04.05.01 or later, requires two update scripts; usp_IBSR_v04.06.00.01.sql, and usp_IBSR_v04.08.00.00.sql.
- Upgrading from release 04.05 or previous, requires three update scripts; usp_IBSR_v04.05.01.sql, usp_IBSR_v04.06.00.01.sql, and usp_IBSR_v04.08.00.00.sql.

Update scripts need to be run manually by the DBA against the SoftRater database. No other steps are needed.

STEP 5 – UPDATING PREFERENCES

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

To Change Settings

1. Select Tools→Preferences.

2. This opens the **Preferences** window. Select **Web Settings**.
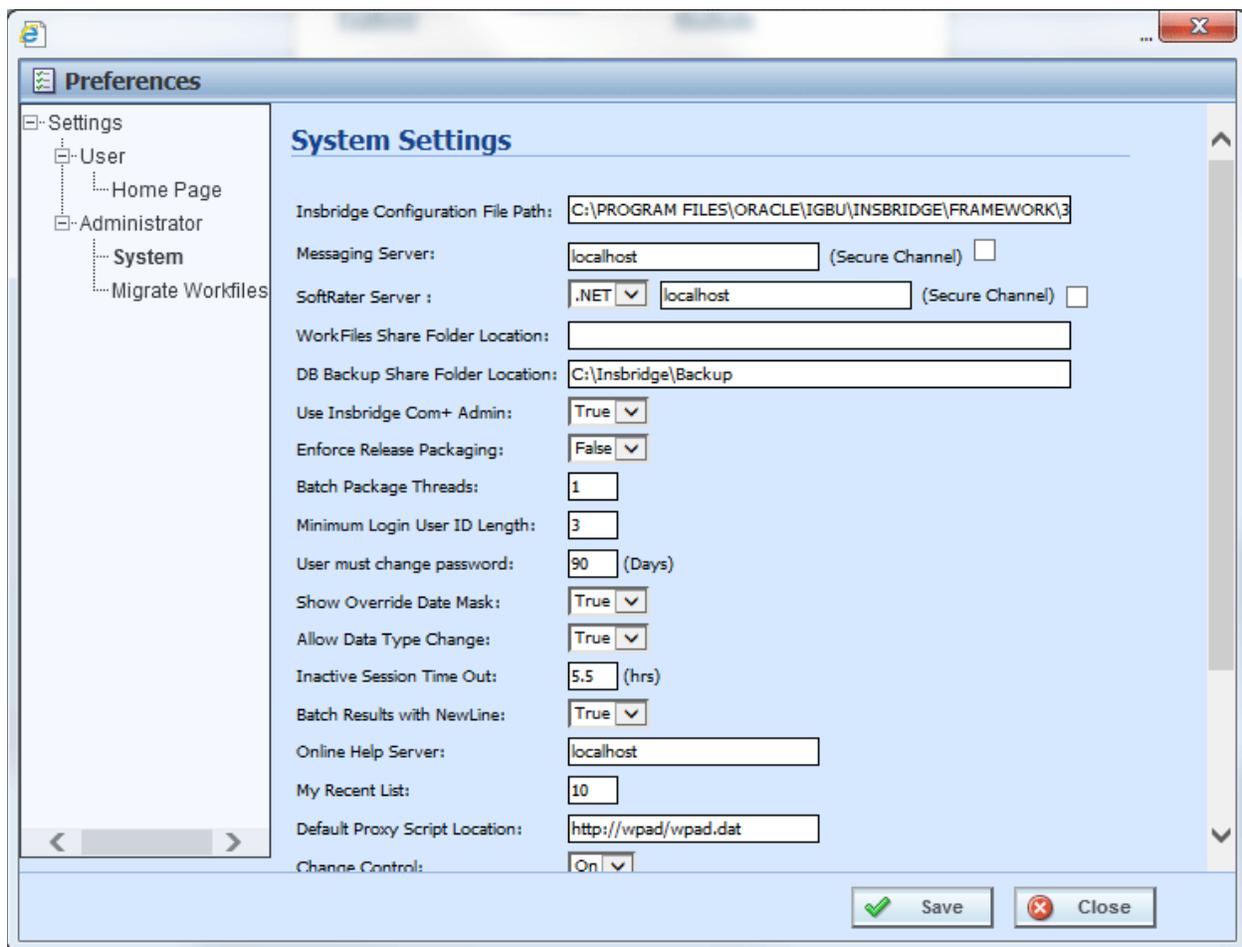
Figure 13 Preferences Settings

3. Make any necessary changes. If you do not know all the settings, you can come back and edit lat a later time. It is recommended that you update the **ONLINE HELP Server** immediately.

4. When you are finished, click **SAVE** to update your settings.

Web Settings

Insbridge 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.

OPTIONAL STEPS

There are optional steps that can be performed for a RateManager/IBFA update.

OBI Publisher

- **Step 1:** Enter OBI Security Information

Migrating Files

- **Step 1:** Migrate Files

These steps may not be required, depending upon the actions you want to take.

OBI PUBLISHER UPDATES

You will need to run this step if you are currently running release 4.7.0 or previous:

This step updates the OBI Publisher in RateManager and the corresponding IBFA from 4.7.0 or previous to release 04.08.00 and assures that OBI is available to users.

- **Step 1:** Enter OBI Security Information

STEP 1 – 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 14 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.
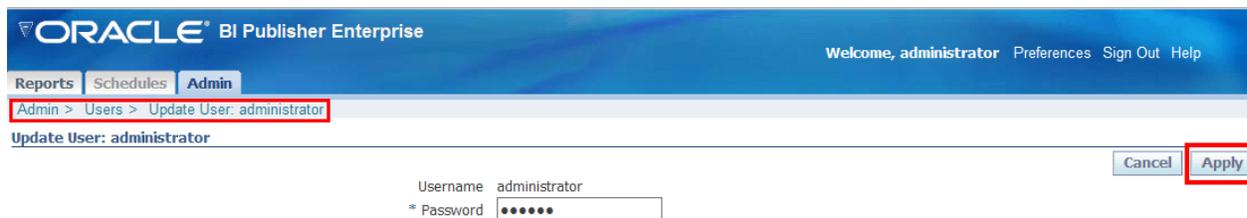
Figure 15 Updating the OBI Publisher Password

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 does not reset the current security setting. For example, if a login was not required for IBFA, upgrading to release 04.08.00 will not change that.*

MIGRATE WORK FILES

This option migrates workfiles from previous versions of RateManager. This procedure is for updates from release 13.7 or previous or if you are updating to a new machine. If you are updating from release 4.0 or later and staying on the same machine, you do not need to migrate workfiles.

STEP 1 – MIGRATE WORK FILES

Migrating workfiles assures that previous workfiles are available to users. Workfiles are rating, pricing, mapping and template files used in various areas of RateManager such as Impact Analysis, Library, and Testing. Migrating files allows users to access work files that were available in previous releases of RateManager. If you do not migrate work files from previous versions, users will not have access to them.

Work files should be migrated after the upgrade has been run.
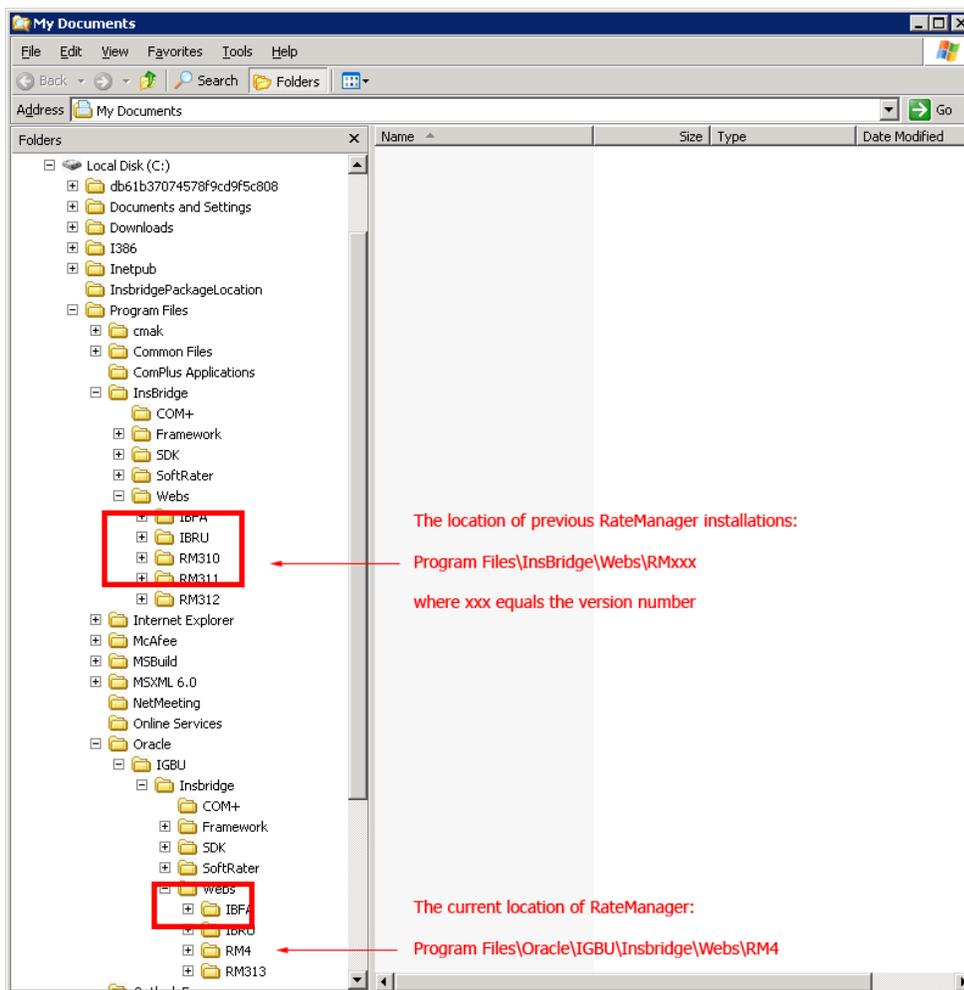
Figure 16 Location of WorkFiles

Prior to migrating files, please create backup copies of the files to be migrated. This requires access to the server were RateManager has been installed.

File Location:

The location of the files to be migrated and the exact file name will depend upon what version of RateManager you want to migrate. There are two possible locations.

For Release 3.12 and earlier:

- **File Name:** WorkFiles
- **Location:** \Program Files\InsBridge\Webs\RM*xxx*\WorkFiles

     Where *xxx* is the version number, i.e. 310, 311, 312

For Release 3.13:

- **File Name:** Workfiles
- **Location:** \Program Files\Oracle\IGBU\Insbridge\Webs\RM313\Workfiles

Copy all work files for every version to be migrated and store in a safe location. In the unlikely event that an error with the migration occurs, you will have backup files that you can place directly in the RateManager (RM4) Workfiles location or restore to the previous version.

Performing the Migration in RateManager

This migration process moves rating, pricing, mapping, and template files from a previous version of RateManager to the current RateManager version. You can select one version that you want to migrate. If you have more than one version to migrate, you must perform the migration manually. Please refer to the Installation and Upgrading Guide for instructions.

1. Select **Tools→Preferences→Administrator→Migrate Workfiles**.
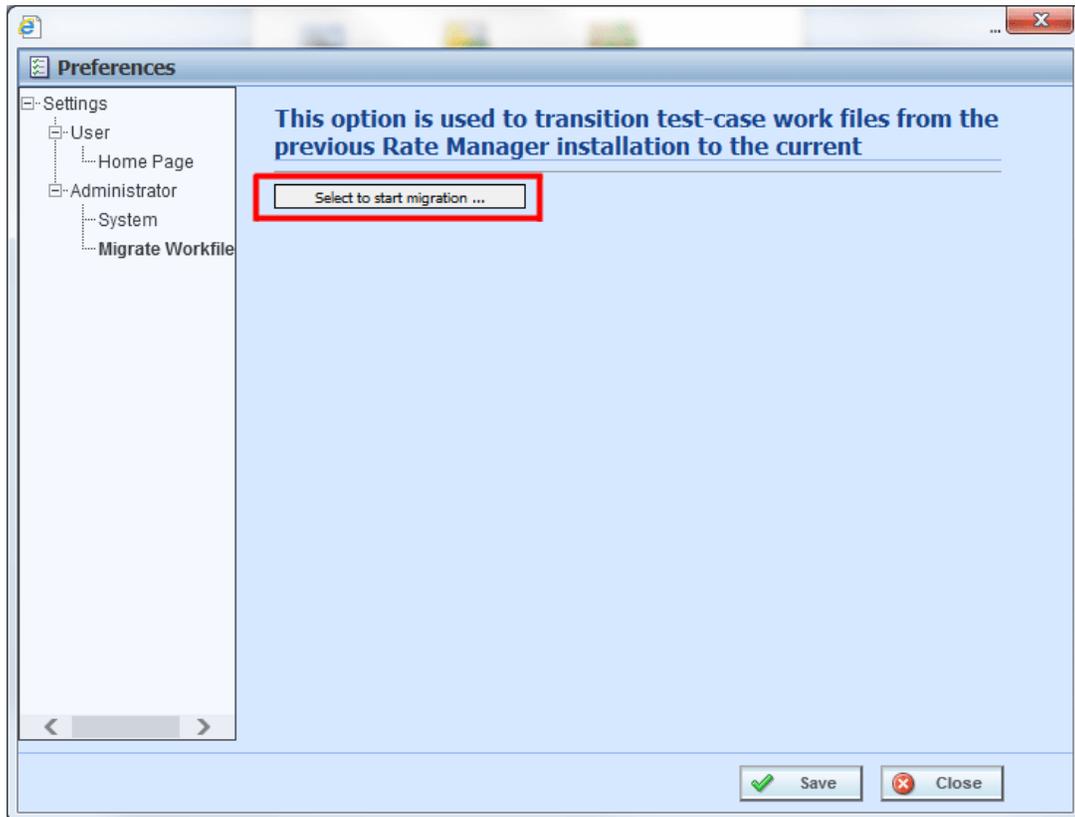
Figure 17 Migrating Work Files

2. Click the Select to start migration button. A separate screen is displayed.

3. RateManager determines the possible version to migrate. **Select** the version you want to migrate. Only work files from the selected version will be migrated.
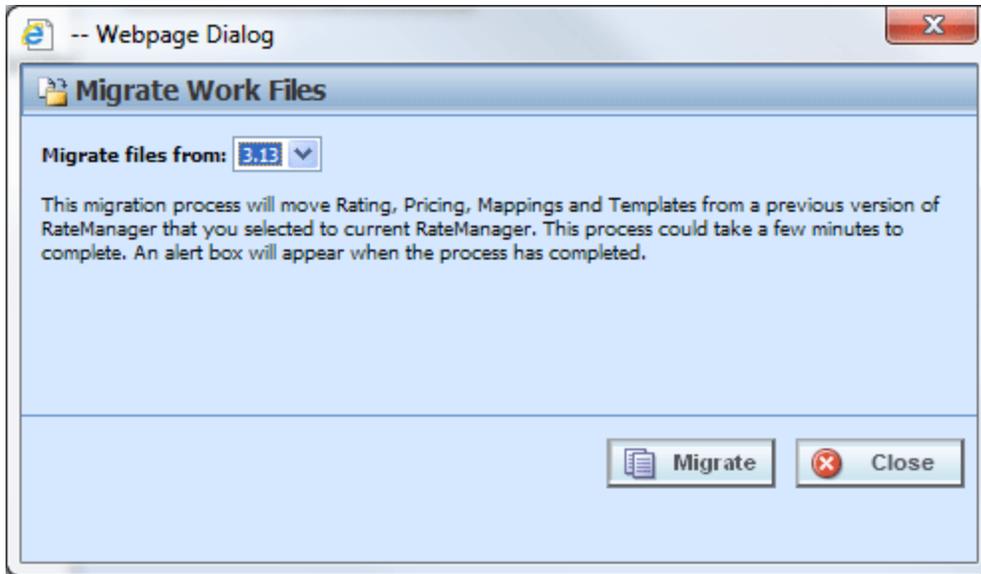
Figure 18 Selecting Workfiles to Migrate

4. Click **Migrate**.
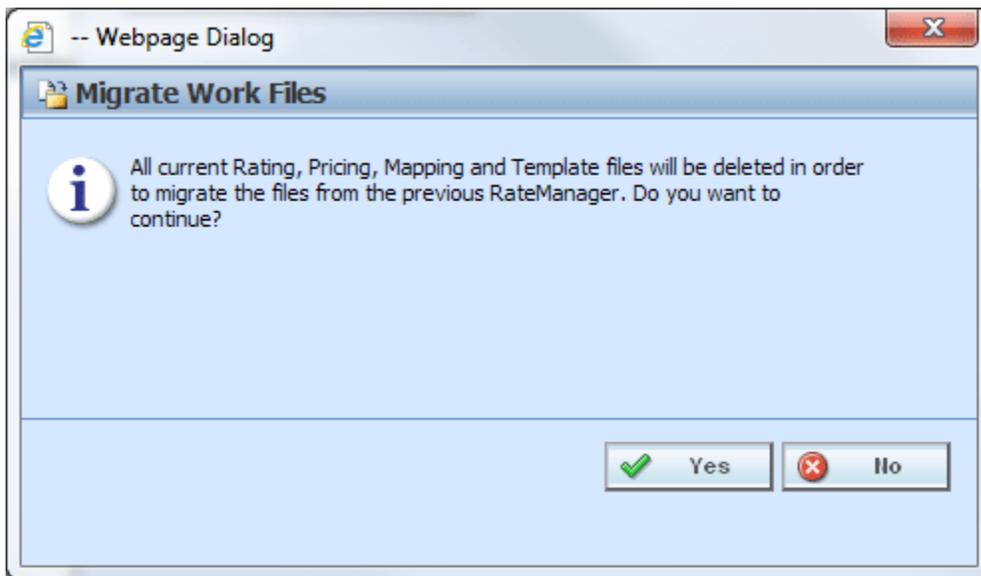
Figure 19 Confirming a Migration

5. Click **Yes** to migrate. If you are unsure about the action you want to take, click No to stop the migration process.

6. The migration will begin. This process could take a few minutes to complete. When all files have been migrated, an information notice will be displayed.
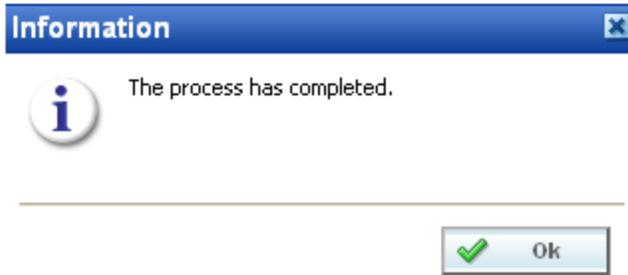
Figure 20 Successful Migration

7. Click OK to close the screen.

Verifying Migrated Files in RateManager

Migrated files are available in the same areas.
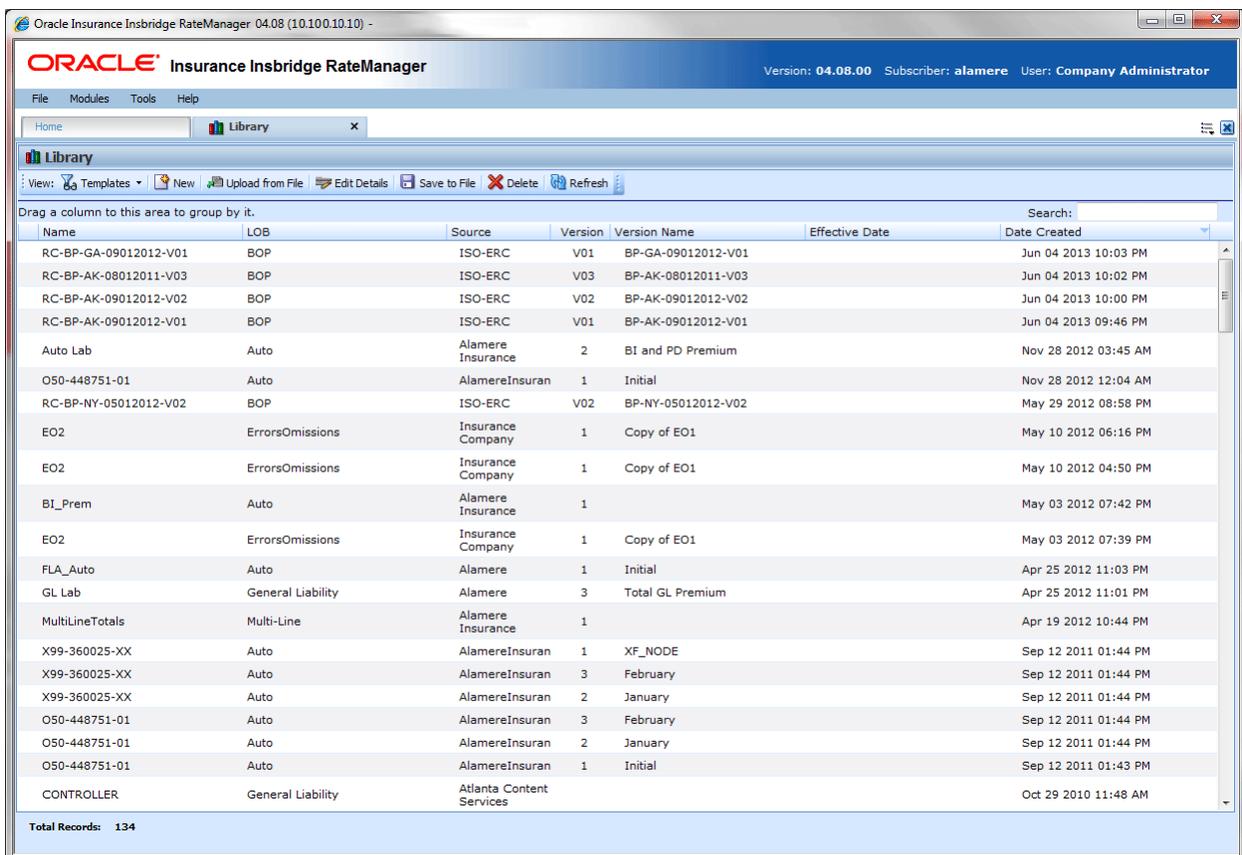
Figure 21 Verifying File Migration in RateManager

To verify that work files from a previous version have been migrated, enter an area where these files would be used, such as the Library tab.

The tab refreshes with all available files. Your files from previous versions will be listed.

NOTE: *Previous export files will not be migrated. Previous export files are not recognized in current releases of RateManager.*

Manual Migration

A manual migration must be performed under select circumstances. All versions must be on the same server. If you are working with two separate machines, you must perform the migration manually. A RateManager migration will perform a copy and paste of the WorkFiles on the server then the previous versions WorkFiles will be deleted. This means that the version you select to be migrated will have the WorkFiles deleted from the server. This cannot be reversed. Make sure this is the action you want to take.

If you have more than one version where you want to migrate files, you will have to perform the migration on the server. **DO NOT USE RATEMANAGER TO MIGRATE MULTIPLE VERSIONS.** Only one version can be migrated. If you attempt to migrate more than one version, you will write over any data with the version that you are migrating. For example, if you migrate version 3.12 and then migrate 3.13, any information from 3.12 will be written over with the information from 3.13. If you have more than one version to migrate, you must perform the migration directly on the server.

Verifying the File Migration in the Server

Migrated files will be moved from previous releases into the updated RM4 Workfiles location.

Figure 22 Verifying File Migration at Server Level

You can verify that files have been moved by looking in the
\Program Files\Oracle\IGBU\Insbridge\Webs\RM4\Workfiles folder.

You also can verify that previous WorkFiles have been removed by looking in the prior WorkFile location on the server.

Workfiles only need to migrated one time.
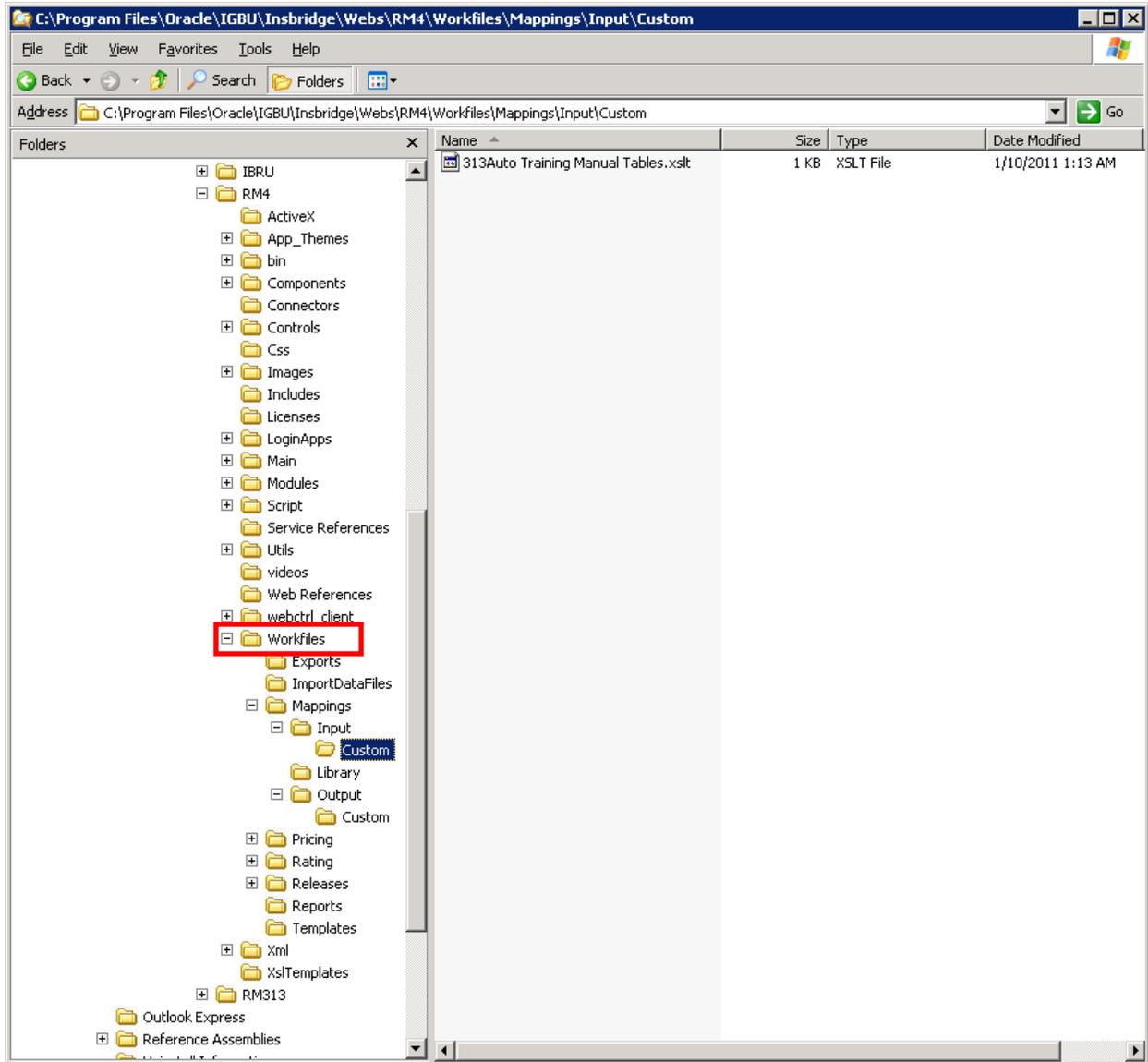
UPGRADING TO A NEW MACHINE

If you are upgrading RateManager/IBFA from any previous release **AND** moving to a different machine you will need to perform these steps. These steps will allow any packages loaded to the old machine to be loaded and used by the new machine. If you do not perform these steps, old packages may not rate properly or even be available to users.

NOTE: *These steps need to be done **only** when you are migrating your RateManager/IBFA instance from an old machine to a new machine.*

- **Step 1:** Install RateManager/IBFA

- **Step 2:** Export the Insbridge Registry Key from the old Machine

- **Step 3:** Import the registry key from the old machine to the new machine

- **Step 4:** Copy the Insbridge XML file from the old machine.

- **Step 5:** Paste the Insbridge XML file in the new machine.

- **Step 6:** Finish the Installation

- **Step 7:** Run any needed Database Client – Optional

- **Step 8:** Manually Migrate Workfiles

After these steps, your RateManager/IBFA should be ready for use.

Step 1: Install RateManager/IBFA

A RateManager/IBFA upgrade that involves moving to a new machine is considered a new install. Please follow the instructions for installing RateManager/IBFA in the *RateManager Installation Guide*.

STOP At Step 6 – Configuring Insbridge Framework Administrator.

Do not create a subscriber or environments.

Step 2: Export the Insbridge Registry Key

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).

When RateManager/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 on the old machine. In order to load packages to the new machine, you will need to restore the previous registry key.

---

1. On the old machine, enter Registry Editor. Run→regedt32.

2. Select the Insbridge key: HKEY_LOCAL_MACHINE→SOFTWARE→Insbridge.

3. Right click and select **Export**.

4. Select a storage location for the file and **Save**.

5. Close out of Registry Editor.

Step 3: Importing the Registry Key

The old registry key needs to be imported in to the new machine.

1. **Save the Exported Registry Key** to a location you can easily access.

2. **Double click the Exported Registry Key**. The key will be loaded.

3. Store the Exported Registry Key in a safe location.

Step 4: Copy the Insbridge.XML File

You can copy and paste the Insbridge XML file from the old machine to the new machine. This will allow the environments and subscriber created in the old machine to be populated in the new machine.

NOTE: *If you want to re-enter or re-create your environments, you can skip Step 4 and Step 5. After you import the registry key, you will need to continue the RateManager/IBFA installation at Step 6 – Configuring Insbridge Framework Administrator.*

File Location:

The location of the Insbridge.XML file to be copied will depend upon what version of RateManager the old machine is running. There are two possible locations.

For Release 3.12 and earlier:

- **File Name:** InsBridge.XML
- **Location: D:\ProgramFiles\InsBridge\Framework\2.0.2\InsBridge.Xml**.
  OR   C:\Program Files\Oracle\Insbridge\Framework\2.0.0\Insbridge.Xml

For Release 3.13 and later:

- **File Name:** InsBridge.XML
- **Location: C:\Program Files\Oracle\IGBU\Insbridge\Framework\3.5.0\Insbridge.Xml**

Copy the Insbridge.XML file to a location you can easily access.

NOTE: *If you are changing databases, you can copy and paste the Insbridge XML file, however you will need to update your environments with the new database information.*

Step 5: Paste the Insbridge.XML File

Before pasting the Insbridge.XML file into the new location, make a copy of the blank Insbridge.XML file and store in a safe location. In the unlikely event that an error occurs, you will have a backup file that you can use.

The Insbridge.XML file in the New Machine is located:

C:\Program Files\Oracle\IGBU\Insbridge\Framework\3.5.0\Insbridge.Xml

1. Make a copy of the blank Insbridge.XML file on the new machine and store in a safe location.

2. Paste the Insbridge.XML file from the old machine in to the new machine in the same location.

3. Open an Internet Explorer web browser either remotely on the local IBER web server and browse to IBFA location on the new machine: http://SERVERNAME/ibfa/

4. Subscribers and Environments should be available in IBFA on the new machine. Verify your entries.

Step 6: Complete the RateManager/IBFA Installation

Complete the instructions for installing RateManager/IBFA. Please see the *RateManager Installation Guide* for detailed instructions.

Continue at Step 7 – Verifying the Component Services. You will need to complete the rest of the installation.

Step 7: Run Database Clients – Optional

This step is optional. You will need to run the Oracle Client or the DB2 Client if you are utilizing a Java SoftRater, i.e. SoftRater for WebLogic, SoftRater for WebSphere or SoftRater for JBoss. The Oracle Client is located in the Oracle Cloud Delivery package. The DB2 client is not included and must be downloaded. For instructions on running the Oracle Client or the DB2 Client, please see the corresponding SoftRater Installation Guide, i.e. *SoftRater for WebLogic Installation Guide*, *SoftRater for WebSphere Installation Guide* or *SoftRater for JBoss Installation Guide*.

If you are running 64-bit, please make sure you use the 64-bit client.

Step 8: Manually Migrate Workfiles

After the installation has been completed, you will need to migrate workfiles. Follow the instructions for Manually Migrating Workfiles, see page 36.

The RateManager system is ready for use.

NOTE: *If users experience any difficulties with migrated packages, please verify that the database usernames and passwords are entered for any SoftRater environment.*

IMPORTING REGISTRY KEY AFTER INSTALLATION

The registry key can be imported at any time after the initial RateManager/IBFA install and subscriber creation. If the registry key needs to be imported after you have completed the installation and set up your SoftRater environments, you will need to re-enter Database Username and Passwords for the SoftRater Environments.

This procedure is only required if you have configured your environments. If you have not configured your environments, you should not have to re-enter usernames and passwords for your environments.

Prior to starting, IBFA should be up and running on the new machine.

Step 1: Export the Insbridge Registry Key

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).

When RateManager/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 on the old machine. In order to load packages to the new machine, you will need to restore the previous registry key.

1. On the old machine, enter Registry Editor. Run→regedt32.

2. Select the Insbridge key: HKEY_LOCAL_MACHINE→SOFTWARE→Insbridge.

3. Right click and select **Export**.

4. Select a storage location for the file and **Save**.

5. Close out of Registry Editor.

Step 2: Importing the Registry Key

The old registry key needs to be imported in to the new machine.

1. **Save the Exported Registry Key** to a location you can easily access.

2. **Double click the Exported Registry Key**. The key will be loaded.

3. Store the Exported Registry Key in a safe location.

Step 3: Re-enter Username and Password

1. Enter the new IBFA instance.

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

3. Select the **Environments** link under the Configuration header on the left hand side.

4. You will notice that the database username and password entries will be blank. Please re-enter the username and password. Test connections for any SoftRater environments.

5. Save your entries and close out of environments.

Upgrading the Database Machine

If you are upgrading your database machine, the new database information will need to be entered in IBFA→Environments.

MANUAL UPDATES TO THE IBER DATABASES

The preferred method of updating the IBRM and IB_CLIENT databases is to go into RateManager. If the administrator has DB User privileges and is the DB Owner of the database as well as the disk administrator, database updates can be done on the **Tools→Database→Updates** tab. If these privileges are not in place, an error message will be displayed. See Step 4 – Updating Databases for more information.

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. First, you will need to get the scripts you need 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 release 03.13 to 04.08.00, 3.13 should be "current". Open 3.13 first.
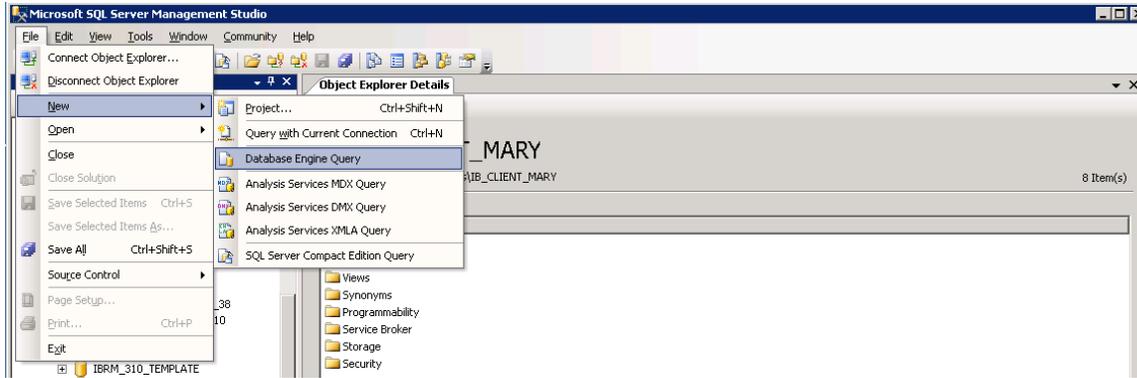
Figure 23 Updating Database

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**. Thehe update script will be displayed in a separate screen.*
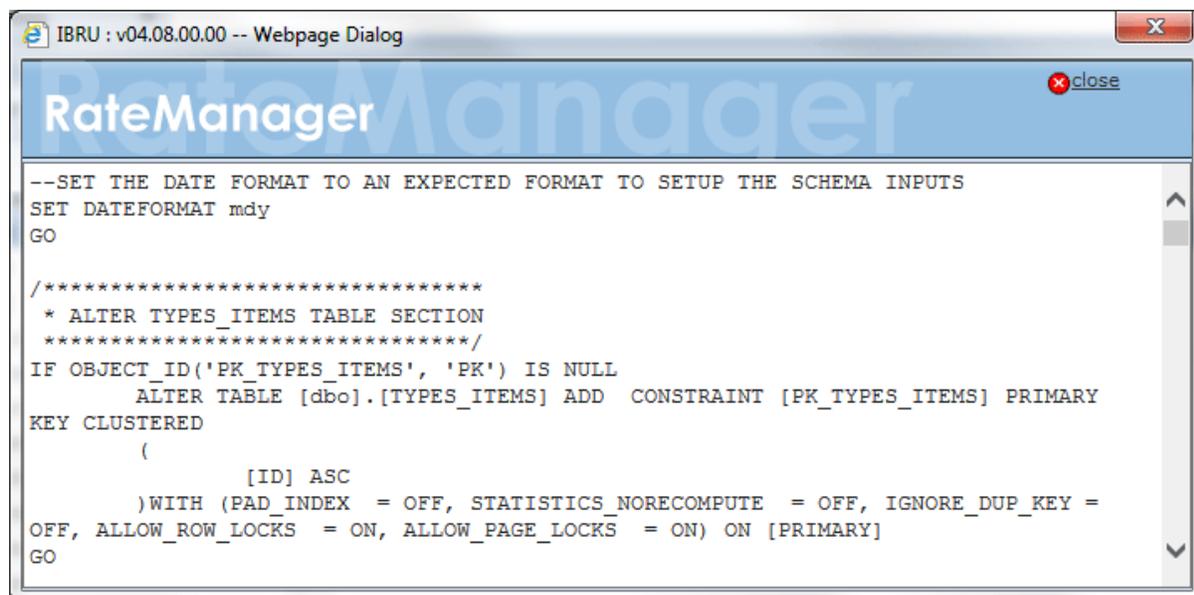

Figure 24 Script Viewer

Updating a SoftRater for Windows Database

For release 04.08.00 SoftRater for Windows requires an update. The SQL database update file is located in the IBER download→Database→SQL Server→SoftRater – IBSR→Update folder. There are three updates scripts.

- Upgrading from release 04.07.00 requires one update script be run, usp_IBSR_v04.08.00.00.sql.
- Upgrading from release 04.05.01 or later, requires two update scripts; usp_IBSR_v04.06.00.01.sql, and usp_IBSR_v04.08.00.00.sql.
- Upgrading from release 04.05 or previous, requires three update scripts; usp_IBSR_v04.05.01.sql, usp_IBSR_v04.06.00.01.sql, and usp_IBSR_v04.08.00.00.sql.

Update scripts need to be run manually by the DBA against the SoftRater database. No other steps are needed.

UPGRADING SOFTRATER FOR JAVA

How you upgrade SoftRater for Java depends upon what IBER release you are starting from:

- Upgrading from Oracle Insurance Insbridge Enterprise Rating Release 3.13.4 or previous to release 04.08.00 requires that the previous .EAR and config files be removed. The new .EAR file then can be deployed. The application starting file must be updated as well.

- If you are upgrading from release 3.13.5 or later, you need to redeploy the .EAR file and update the application starting file. You do not need to redeploy the config file.

- An update script must be run against the database being utilizing.

- If you are upgrading from release 3.12 or previous you should check for SOAP changes. Updated WSDL documents will need to be incorporated into any client calling application that communicates with SoftRater. If upgrades are done to the SoftRater for Java engines without updating the calling applications, the calling application will fail.

NOTE: **UPGRADE YOUR TEST ENVIRONMENT PRIOR TO PRODUCTION. Validate in test prior to implementing in production.**

Steps to Upgrade SoftRater for Java:

Every upgrade requires:

1. **Update the application server.** Please follow the instruction for the release your application server is currently running.

    - For Release 3.13.4 and Prior, delete the .EAR file and config file.
    - For Release 3.13.5 and Later, delete the .EAR file only.

2. **Deploy the new .EAR file**.

3. **Update the application starting file**. Every SoftRater for Java requires a new property in the start file of the application server.

4. **Update the associated database.** All database updates should be performed by your DBA or qualified system administrator. This takes the SoftRater databases to release 04.08.00.

NOTE: *Updates are performed manually on the database server.*

5. **OPTIONAL:** Update the WSDL documents. You need to perform this step if you are currently running release 3.12 or previous **and** incorporating a calling application. This allows your calling application to function in the upgraded SoftRater. If you are not incorporating a calling application, you will not need to do this step.

SOFTRATER UPDATES

There are three SoftRater for Java engines:

- SoftRater for WebLogic

- SoftRater for WebSphere

- SoftRater for JBoss

The upgrade procedures to the application are similar and the upgrade procedure for the associated databases is the same.

SOAP NOTICE

This notice is for customers currently running a SoftRater for Java engine:

- **SoftRater for WebLogic**

- **SoftRater for WebSphere**

- **SoftRater for JBoss**

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

- **SoftRater for WebSphere uses SOAP version 1.1**.

- **SoftRater for WebLogic uses SOAP version 1.1**.

- **SoftRater for JBoss uses SOAP version 1.1**.

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

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

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

These updates are for the SoftRater for Java engines only.

UPGRADING WEBLOGIC

SoftRater for WebLogic can be upgraded any time after the IBER system. Prior to upgrading, download the SoftRater for WebLogic Engine Setup zip file from the Oracle Software Delivery Cloud https://edelivery.oracle.com. Unzip the file and place the contents for Release 04.08.00 in a location you can easily access. File contents include:

- **IBSS.ear**

- **Insbridge.net.softraterconfig.xml**

NOTE: *If you are using a DB2 database, a system property must be added to the startWebLogic file. Please see the SoftRater for WebLogic Installation Guide for complete instructions when utilizing a DB2 database.*

Upgrading from Release 4.7.x

This method removes the previous .EAR but leaves the config files. This upgrade does not require the creation of an Instance folder. The configuration information will remain and does not need to be re-entered in IBSS.

1. With WebLogic running, enter the console and delete the old IBSS.EAR file.

2. Stop the WebLogic Service.

3. On the server where WebLogic is installed, locate the configuration folder used in the previous SoftRater for WebLogic installation. For example:

   - In a Windows environment, C:\Insbridge\config

   - In a Linux environment, `home/Insbridge/config`

   This same folder should be used for the update.

4. Delete the old .EAR file. Leave the config.xml file in place. You also can leave the log file and the .jar file, if present.

5. Place the new IBSS.EAR file in the config folder. Once this file is in place, do not move.

6. Start the WebLogic server.

7. Enter WebLogic and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for WebLogic Installation Guide.

8. Enter IBSS. All config information should be present. You will not need to re-enter the config information.

9. Verify your entry and connections in IBFA.

10. Test your configuration and updated calling applications before deploying to production.

Upgrading from Release 3.13.5 to 4.6.x

This method removes the previous .EAR but leaves the config files. This upgrade is for SoftRater for WebLogics instances that do not have an Instance file. The configuration information will remain and does not need to be re-entered in IBSS.

1. With WebLogic running, enter the console and delete the old IBSS_WL.EAR file.

2. Stop the WebLogic Service.

3. On the server where WebLogic is installed, locate the configuration folder used in the previous SoftRater for WebLogic installation. For example:

    *   In a Windows environment, C:\Insbridge\config

    *   In a Linux environment, `home/Insbridge/config`

    This same folder should be used for the update.

4. Delete the old .EAR file. Leave the config.xml file in place. You also can leave the log file and the .jar file, if present.

5. Place the new IBSS.EAR file in the config folder. Once this file is in place, do not move.

6. A new folder needs to be created under the config folder. This new folder is an instance folder. We suggest creating an Insbridge config instance folder but you may use any folder name you want and the folder must be under the config folder. Take note of the location and make sure you have created this folder prior to deploying the .EAR file. This location serves as the instance application directory.

    *   For a Windows environment, C:\Insbridge\config\instance

    *   For a Linux environment, `home/Insbridge/config/instance`

7. A new system property must be added to the startWebLogic file. An Instance property is required. Place this property after the `-DINSBRIDGE_APP_DIR=` property.

    *   `-DINSBRIDGE_INSTANCE_APP_DIR="`C:\Insbridge\Config|Instance`". If you copy, please verify valid characters have been entered.`

        In this declaration, add a system property for the instance application directory to the Java Virtual Machine using the "**-D**" parameter, then specify "**INSBRIDGE_INSTANCE_APP_DIR**" as the name of the new variable.

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

    For Linux `-DINSBRIDGE_INSTANCE_APP_DIR="/home/INSTALLDIR/Insbridge/Config/ Instance"`

NOTE: *Please see the SoftRater for WebLogic Installation Guide for assistance with editing the startWebLogic file.*

---

8. Start the WebLogic server.

---

9. Enter WebLogic and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for WebLogic Installation Guide.

10. Enter IBSS. All config information should be present. You will not need to re-enter the config information.

11. Verify your entry and connections in IBFA.

12. Test your configuration and updated calling applications before deploying to production.

Upgrading from Release 3.13.4 or Previous

This method removes the previous .EAR and config files. The configuration information needs to be re-entered in IBSS and validated in IBFA.

If you are using SQL Server, please see Preserving Environments for a SQL Server Upgrade on page 70. The Preserving Environments for SQL Server Upgrade information allows you to keep your existing environments by editing the config file.

1. With WebLogic running, enter the console and delete the old IBSS_WL.EAR file.

2. Stop the WebLogic Service.

3. On the server where WebLogic is installed, locate the configuration folder used in the previous SoftRater for WebLogic installation. For example:

   - In a Windows environment, C:\Insbridge\config

   - In a Linux environment, `home/Insbridge/config`

   This same folder should be used for the update.

4. Within the configuration folder, locate the current **Insbridge.net.softraterconfig.xml** file and make a back-up copy. The configuration information needs to be re-entered in IBSS. The updated config file will not contain this information. This information cannot be directly imported but a copy of the original file may be helpful when re-entering.

5. Delete the old config file, and the old .EAR file. You can leave the log file and the .jar file, if present.

6. Place the new IBSS.EAR file and the new Insbridge.net.softraterconfig.xml in the config folder. Once these files are in place, do not move.

7. A new folder needs to be created under the config folder. This new folder is an instance folder. We suggest creating an Insbridge config instance folder but you may use any folder name you want and the folder must be under the config folder. Take note of the location and make sure you have created this folder prior to deploying the .EAR file. This location serves as the instance application directory.

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

   - For a Linux environment, home/Insbridge/config/instance

8. A new system property must be added to the startWebLogic file. An Instance property is required. Place this property after the -DINSBRIDGE_APP_DIR= property.

- -DINSBRIDGE_INSTANCE_APP_DIR="C:\Insbridge\Config|Instance". If you copy, please verify valid characters have been entered.

  In this declaration, add a system property for the instance application directory to the Java Virtual Machine using the "**-D**" parameter, then specify "**INSBRIDGE_INSTANCE_APP_DIR**" as the name of the new variable.

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

  For Linux -DINSBRIDGE_INSTANCE_APP_DIR="/home/INSTALLDIR/Insbridge/Config/ Instance"

NOTE: *Please see the SoftRater for WebLogic Installation Guide for assistance with editing the startWebLogic file.*

9. Start the WebLogic server.

10. Enter WebLogic and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for WebLogic Installation Guide.

11. Enter IBSS. The previous entries will not be listed. You will need to re-enter the config information. To verify the information, open the previous config file. Scroll to find SoftLibrary information <lib_ref> and Environment information <connection name=>.

Figure 25 Locating Information from Insbridge.XML File

12. Verify your entry and connections in IBFA.

13. If necessary, obtain any WSDL information from IBSS and update any calling application.

14. Test your configuration and updated calling applications before deploying to production.

UPGRADING WEBSPHERE

SoftRater for WebSphere can be upgraded any time after the IBER system. Prior to upgrading, download the SoftRater for WebSphere Engine Setup zip file for your version of WebSphere from the Oracle Software Delivery Cloud https://edelivery.oracle.com. Unzip the file and place the contents for Release 04.08.00 in a location you can easily access. File contents include:

- **IBSS.ear**

- **Insbridge.net.softraterconfig.xml**

NOTE: *If you are using a DB2 database, you will need to reconnect the DB2.jar to the ins.ru.ear file and the Archetype Created Web Application using the Shared Library Reference section in WebSphere. This connection is broken when the previous .jar file is deleted.*

Upgrading from Release 4.7.x

This method removes the previous .EAR but leaves the config files. This upgrade does not require the creation of an Instance folder. The configuration information will remain and does not need to be re-entered in IBSS.

1. With WebSphere running, enter the console and delete the old IBSS_WS.EAR file.

2. Stop the WebSphere Service.

3. On the server where WebSphere is installed, locate the configuration folder used in the previous SoftRater for WebSphere installation. For example:

   - In a Windows environment, C:\Insbridge\config

   - In a Linux environment, `home/Insbridge/config`

   This same folder should be used for the update.

4. Delete the old .EAR file. Leave the config.xml file in place. You also can leave the log file, if present.

5. Place the new IBSS.EAR file in the config folder. Once this file is in place, do not move.

6. Start the WebSphere server.

7. Enter WebSphere and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for WebSphere Installation Guide.

8. Enter IBSS. All config information should be present. You will not need to re-enter the config information.

9. Verify your entry and connections in IBFA.

10. Test your configuration and updated calling applications before deploying to production.

Upgrading from Release 3.13.5 to 4.6.x

This method removes the previous .EAR but leaves the config files. This upgrade is for SoftRater for WebLogics instances that do not have an Instance file. The configuration information will remain and does not need to be re-entered in IBSS.

1. With WebSphere running, enter the console and delete the old IBSS_WS.EAR file.

2. Stop the WebSphere Service.

3. On the server where WebSphere is installed, locate the configuration folder used in the previous SoftRater for WebSphere installation. For example:

   - In a Windows environment, C:\Insbridge\config

   - In a Linux environment, `home/Insbridge/config`

   This same folder should be used for the update.

4. Delete the old .EAR file. Leave the config.xml file in place. You also can leave the log file, if present.

5. Place the new IBSS.EAR file in the config folder. Once this file is in place, do not move.

6. A new folder needs to be created under the config folder. This new folder is an instance folder. We suggest creating an Insbridge config instance folder but you may use any folder name you want and the folder must be under the config folder. Take note of the location and make sure you have created this folder prior to deploying the .EAR file. This location serves as the instance application directory.

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

   - For a Linux environment, `home/Insbridge/config/instance`

7. Start the WebSphere server.

8. A new system property must be added to the Name Space Bindings. INSBRIDGE_INSTANCE_APP_DIR. from the WebSphere Admin console, browse to the following location:

   Environment → Naming → Name Space Bindings

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

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

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

12. Create a Name Space Binding and Binding Identifier at the server level called INSBRIDGE_INSTANCE_APP_DIR. The actual string value is the directory path location where the Instance file was placed for example, C:\Insbridge\config\instance

13. Then select **Next**

14. Click **Finish**.

15. After creating both the Name Space Bindings, Save to the master configuration.

NOTE: *Please see the SoftRater for WebSphere Installation Guide for assistance with creatingName Space Bindings.*

---

16. Enter WebSphere and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for WebSphere Installation Guide.

17. Enter IBSS. All config information should be present. You will not need to re-enter the config information.

18. Verify your entry and connections in IBFA.

19. Test your configuration and updated calling applications before deploying to production.

Upgrading from Release 3.13.4 or Previous

This method removes the previous .EAR and config files. The configuration information needs to be re-entered in IBSS and validated in IBFA.

If you are using SQL Server, please see Preserving Environments for a SQL Server Upgrade on page 70. The Preserving Environments for SQL Server Upgrade information allows you to keep your existing environments by editing the config file.

1. With WebSphere running, enter the console and delete the old IBSS_WS.EAR file.

2. Stop the WebSphere Service.

3. On the server where WebSphere is installed, locate the configuration folder used in the previous SoftRater for WebSphere installation. For example:

   - In a Windows environment, C:\Insbridge\config

   - In a Linux environment, `home/Insbridge/config`

   This same folder should be used for the update.

4. Within the configuration folder, locate the current **Insbridge.net.softraterconfig.xml** file and make a back-up copy. The configuration information needs to be re-entered in IBSS. The updated config file will not contain this information. This information cannot be directly imported but a copy of the original file may be helpful when re-entering.

5. Delete the old config file, and the old .EAR file. You can leave the log file, if present.

6. Place the new IBSS.EAR file and the new Insbridge.net.softraterconfig.xml in the config folder. Once these files are in place, do not move.

7. A new folder needs to be created under the config folder. This new folder is an instance folder. We suggest creating an Insbridge config instance folder but you may use any folder name you want and the folder must be under the config folder. Take note of the location and make sure you have created this folder prior to deploying the .EAR file. This location serves as the instance application directory.

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

- For a Linux environment, `home/Insbridge/config/instance`

8. Start the WebSphere server.

9. A new system property must be added to the Name Space Bindings. INSBRIDGE_INSTANCE_APP_DIR. from the WebSphere Admin console, browse to the following location:

   Environment → Naming → Name Space Bindings

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

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

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

13. Create a Name Space Binding and Binding Identifier at the server level called INSBRIDGE_INSTANCE_APP_DIR. The actual string value is the directory path location where the Instance file was placed for example, C:\Insbridge\config\instance

14. Then select **Next**

15. Click **Finish**.

16. After creating both the Name Space Bindings, Save to the master configuration.

NOTE: *Please see the SoftRater for WebSphere Installation Guide for assistance with creatingName Space Bindings.*

17. Enter WebSphere and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for WebSphere Installation Guide.

18. Enter IBSS. The previous entries will not be listed. You will need to re-enter the config information. To verify the information, open the previous config file. Scroll to find SoftLibrary information <lib_ref> and Environment information <connection name=>.

```
124
125        ***********************************************************-->
126   <lib_ref>
127
128   <lib n="OIPAStubAdaptor" cls="oracle.insurance.pas.OIPALifeAdaptor" l="" d="2012-07-30 02:23:43 AM" s="a" t="2">
129     <arguments v="args">
130       <arg n="strip-crlf" v="true" />
131       <arg n="stub-mode" v="true" />
132       <arg n="html-reprt" v="true" />
133     </arguments>
134   </lib>
135
136   <lib n="LOVTestSoftData" cls="com.oracle.igbu.activity.ListOfValuesIbfaSoftDataImpl" l="" d="2012-10-05 07:13:45 AM" s="a" t="2">
137     <arguments v="args">
138       <arg n="wsdl-uri" v="http://10.100.10.100/ibfa/connectors/softdata.asmx?WSDL" />
139     </arguments>
140   </lib>
141   |
142   <lib n="GetUsersActivityAdaptor" cls="com.oracle.igbu.activity.GetUsersMockImpl" l="" d="2012-12-12 09:27:58 AM" s="a" t="2" />
143
144   <lib n="PolicySubmitMockImpl" cls="com.oracle.igbu.activity.SubmitPolicyMockImpl" l="" d="2012-07-30 02:23:34 AM" s="a" t="2">
145     <arguments v="args" />
146   </lib>
147
148   <lib n="Credit" cls="CREDIT.jar" l="checked" d="2011-07-18 11:53:08 AM" s="a" t="2" /><lib n="Property" cls="Property.jar" l="" d=
      "2011-07-18 11:53:21 AM" s="d" t="2" />
149
150   </lib_ref>                                                  SoftLibrary Information
151
152   <connection name="SR_PROD_WL_1" id="-99" provider="1" dbtype="R" uid="XXXX" pwd="xxxxxxxxxxxxx" dataServer="WINAPP007" dataSource=
      "IBSR_Alamere" port="1433" DataDir="C:\Insbridge\SR_Packages\" default="false" sql_block_cnt="" dataSchema="" xdb_p1="1" />
153
154   <connection name="SR_PROD_WL_2" id="-99" provider="2" dbtype="R" uid="XXXX" pwd="xxxxxxxxxxxxx" dataServer="linapp001.example.com"
      dataSource="IBSR__ALAMERE_2" port="47479" DataDir="/home/Insbridge_Package\" default="false" sql_block_cnt="" dataSchema="Insbridge"
      xdb_p1="1" />
155
156   <connection name="SR_PROD_WL_3" id="-99" provider="0" dbtype="R" uid="XXXX" pwd="xxxxxxxxxxxxx" dataServer="10.100.10.100" dataSource=
      "IBSR_ALAMERE_3" port="50000" DataDir="C:\insbridge\sr_packages_Alamere\" default="false" sql_block_cnt="5" dataSchema="Insbridge"
      xdb_p1="1" /></config>
157                                                              Environment Information
158   </softrater>
```

Figure 26 Locating Information from Insbridge.XML File

19. Verify your entry and connections in IBFA.

20. If necessary, obtain any WSDL information from IBSS and update any calling application.

21. Test your configuration and updated calling applications before deploying to production.

UPGRADING JBOSS

SoftRater for JBoss can be upgraded any time after the IBER system. Prior to upgrading, download the SoftRater for JBoss Engine Setup zip file from the Oracle Software Delivery Cloud https://edelivery.oracle.com. Unzip the file and place the contents for Release 04.08.00 in a location you can easily access. File contents include:

- **IBSS.ear**

- **Insbridge.net.softraterconfig.xml**

NOTE: *If you are using a DB2 database, a system property must be added to the server classpath. Please see the SoftRater for JBoss Installation Guide for complete instructions when utilizing a DB2 database.*

Upgrading from Release 4.7.x

This method removes the previous .EAR but leaves the config files. This upgrade does not require the creation of an Instance folder. The configuration information will remain and does not need to be re-entered in IBSS.

1. With JBoss running, enter the console and delete the old IBSS_JB.EAR file.

2. Stop the JBoss Service.

3. On the server where JBoss is installed, locate the configuration folder used in the previous SoftRater for JBoss installation. For example:

    - In a Windows environment, C:\Insbridge\config

    - In a Linux environment, home/Insbridge/config

    This same folder should be used for the update.

4. Delete the old .EAR file. Leave the config.xml file in place. You also can leave the log file, if present.

5. Delete the old config file, the old .EAR file, and IBSS.EAR.deploy file. You can leave the log file or README.txt file, if present.

6. Start the JBoss server.

7. Enter JBoss and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for JBoss Installation Guide.

8. Enter IBSS. All config information should be present. You will not need to re-enter the config information.

9. Verify your entry and connections in IBFA.

10. Test your configuration and updated calling applications before deploying to production.

Upgrading from Release 3.13.5 to 4.6.x

This method removes the previous .EAR but leaves the config files. This upgrade is for SoftRater for WebLogics instances that do not have an Instance file. The configuration information will remain and does not need to be re-entered in IBSS.

1. With JBoss running, enter the console and delete the old IBSS_JB.EAR file.

2. Stop the JBoss Service.

3. On the server where JBoss is installed, locate the configuration folder used in the previous SoftRater for JBoss installation. For example:

    - In a Windows environment, C:\Insbridge\config

    - In a Linux environment, `home/Insbridge/config`

    This same folder should be used for the update.

4. Delete the old .EAR file. Leave the config.xml file in place. You also can leave the log file, if present.

5. Delete the old config file, the old .EAR file, and IBSS.EAR.deploy file. You can leave the log file or README.txt file, if present.

6. A new folder needs to be created under the config folder. This new folder is an instance folder. We suggest creating an Insbridge config instance folder but you may use any folder name you want and the folder must be under the config folder. Take note of the location and make sure you have created this folder prior to deploying the .EAR file. This location serves as the instance application directory.

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

    - For a Linux environment, `home/Insbridge/config/instance`

7. A new system property must be added to the startJBoss file. An Instance property is required. Place this property after the `–DINSBRIDGE_APP_DIR=` property.

    - `–DINSBRIDGE_INSTANCE_APP_DIR="`C:\Insbridge\Config|Instance`"`. If you copy, please verify valid characters have been entered.

      In this declaration, add a system property for the instance application directory to the Java Virtual Machine using the "**-D**" parameter, then specify "**INSBRIDGE_INSTANCE_APP_DIR**" as the name of the new variable.

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

    For Linux `–DINSBRIDGE_INSTANCE_APP_DIR="/home/INSTALLDIR/Insbridge/Config/Instance"`

8. Start the JBoss server.

9. Enter JBoss and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for JBoss Installation Guide.

10. Enter IBSS. All config information should be present. You will not need to re-enter the config information.

11. Verify your entry and connections in IBFA.

12. Test your configuration and updated calling applications before deploying to production.

Upgrading from Release 3.13.4 or Previous

This method removes the previous .EAR and config files. The configuration information needs to be re-entered in IBSS and validated in IBFA.

If you are using SQL Server, please see Preserving Environments for a SQL Server Upgrade on page 70. The Preserving Environments for SQL Server Upgrade information allows you to keep your existing environments by editing the config file.

1. With JBoss running, enter the console and delete the old IBSS_JB.EAR file. If you do not use the JBoss console, you can delete the old IBSS file after the service has stopped.

2. Stop the JBoss Service.

3. On the server where JBoss is installed, locate the configuration folder used in the previous SoftRater for JBoss installation. For example:

   - In a Windows environment, C:\Insbridge\config

   - In a Linux environment, `home/Insbridge/config`

   This same folder should be used for the update.

4. Within the configuration folder, locate the current **Insbridge.net.softraterconfig.xml** file and make a back-up copy. The configuration information needs to be re-entered in IBSS. The updated config file will not contain this information. This information cannot be directly imported but a copy of the original file may be helpful when re-entering.

5. Delete the old config file, the old .EAR file, and IBSS.EAR.deploy file. You can leave the log file or README.txt file, if present.

6. Place the new IBSS.EAR file and the new Insbridge.net.softraterconfig.xml in the config folder. Once these files are in place, do not move.

7. A new folder needs to be created under the config folder. This new folder is an instance folder. We suggest creating an Insbridge config instance folder but you may use any folder name you want and the folder must be under the config folder. Take note of the location and make sure you

have created this folder prior to deploying the .EAR file. This location serves as the instance application directory.

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

- For a Linux environment, `home/Insbridge/config/instance`

8. A new system property must be added to the startJBoss file. An Instance property is required. Place this property after the -DINSBRIDGE_APP_DIR= property.

- `-DINSBRIDGE_INSTANCE_APP_DIR="`C:\Insbridge\Config|Instance`".` If you copy, please verify valid characters have been entered.

    In this declaration, add a system property for the instance application directory to the Java Virtual Machine using the "**-D**" parameter, then specify "**INSBRIDGE_INSTANCE_APP_DIR**" as the name of the new variable.

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

For Linux `-DINSBRIDGE_INSTANCE_APP_DIR="/home/INSTALLDIR/Insbridge/Config/Instance"`

NOTE: *Please see the SoftRater for JBoss Installation Guide for assistance with editing the startJBoss file.*

9. Start the JBoss server.

10. Enter JBoss and deploy the new .EAR file. For help with installing the .EAR file, please see the SoftRater for JBoss Installation Guide. If you do not use the JBoss console, the .EAR file should deploy when starting.

11. Enter IBSS. The previous entries will not be listed. You will need to re-enter the config information. To verify the information, open the previous config file. Scroll to find SoftLibrary information <lib_ref> and Environment information <connection name=>.

```
124
125          *****************************************************-->
126  <lib_ref>
127
128  <lib n="OIPAStubAdaptor" cls="oracle.insurance.pas.OIPALifeAdaptor" l="" d="2012-07-30 02:23:43 AM" s="a" t="2">
129    <arguments v="args">
130      <arg n="strip-crlf" v="true" />
131      <arg n="stub-mode" v="true" />
132      <arg n="html-reprt" v="true" />
133    </arguments>
134  </lib>
135
136  <lib n="LOVTestSoftData" cls="com.oracle.igbu.activity.ListOfValuesIbfaSoftDataImpl" l="" d="2012-10-05 07:13:45 AM" s="a" t="2">
137    <arguments v="args">
138      <arg n="wsdl-uri" v="http://10.100.10.100/ibfa/connectors/softdata.asmx?WSDL" />
139    </arguments>
140  </lib>
141  |
142  <lib n="GetUsersActivityAdaptor" cls="com.oracle.igbu.activity.GetUsersMockImpl" l="" d="2012-12-12 09:27:58 AM" s="a" t="2" />
143
144  <lib n="PolicySubmitMockImpl" cls="com.oracle.igbu.activity.SubmitPolicyMockImpl" l="" d="2012-07-30 02:23:34 AM" s="a" t="2">
145    <arguments v="args" />
146  </lib>
147
148  <lib n="Credit" cls="CREDIT.jar" l="checked" d="2011-07-18 11:53:08 AM" s="a" t="2" /><lib n="Property" cls="Property.jar" l="" d=
       "2011-07-18 11:53:21 AM" s="d" t="2" />
149
150  </lib_ref>                                              SoftLibrary Information
151
152  <connection name="SR_PROD_WL_1" id="-99" provider="1" dbtype="R" uid="XXXX" pwd="xxxxxxxxxxxxx" dataServer="WINAPP007" dataSource=
       "IBSR_Alamere" port="1433" DataDir="C:\Insbridge\SR_Packages\" default="false" sql_block_cnt="" dataSchema="" xdb_p1="1" />
153
154  <connection name="SR_PROD_WL_2" id="-99" provider="2" dbtype="R" uid="XXXX" pwd="xxxxxxxxxxxxx" dataServer="linapp001.example.com"
       dataSource="IBSR__ALAMERE_2" port="47479" DataDir="/home/Insbridge_Package\" default="false" sql_block_cnt="" dataSchema="Insbridge"
       xdb_p1="1" />
155
156  <connection name="SR_PROD_WL_3" id="-99" provider="0" dbtype="R" uid="XXXX" pwd="xxxxxxxxxxxxx" dataServer="10.100.10.100" dataSource=
       "IBSR_ALAMERE_3" port="50000" DataDir="C:\insbridge\sr_packages_Alamere\" default="false" sql_block_cnt="5" dataSchema="Insbridge"
       xdb_p1="1" /></config>
157                                                          Environment Information
158  </softrater>
```

Figure 27 Locating Information from Insbridge.XML File

12. Verify your entry and connections in IBFA.

13. If necessary, obtain any WSDL information from IBSS and update any calling application.

14. Test your configuration and updated calling applications before deploying to production.

Common Errors

If you experience any deployment issues, look for a deploy fail file in the deployments folder. Delete the deploy fail file and try again.

Preserving Environments for a SQL Server Upgrade

NOTE: *You do not need to do perform this action if you are running release 3.13.5, or later. These steps are not necessary if you do not want to keep your existing environments.*

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

1. Deploy the new .EAR file.

2. Open the insbridge.net.softraterconfig.xml. The insbridge.net.softraterconfig.xml file will be located in the folder you setup when you initially installed SoftRater for WebLogic. For example, C:\Insbridge\config.

3. Make a back-up copy of this file.

4. In the insbridge.net.softraterconfig.xml file, find this section:

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

And replace it with this:

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

5. Restart the Application Server.

UPDATING SOFTRATER FOR JAVA DATABASES

After the application servers have been updated, you may need to update the database servers. All database updates for SoftRater engines must be performed manually. Upgrading from release 04.07.00 does not require an update.

SQL Server Update

SoftRater for Java utilizing a SQL Server database requires an update script be run against the SQL Server database.

The SQL database update file is located in the IBER download→Database→SQL Server→SoftRater – IBSR→Update folder. There are three updates scripts.

- Upgrading from release 04.07.00 requires one update script be run, usp_IBSR_v04.08.00.00.sql.
- Upgrading from release 04.05.01 or later, requires two update scripts; usp_IBSR_v04.06.00.01.sql, and usp_IBSR_v04.08.00.00.sql.
- Upgrading from release 04.05 or previous, requires three update scripts; usp_IBSR_v04.05.01.sql, usp_IBSR_v04.06.00.01.sql, and usp_IBSR_v04.08.00.00.sql.

Update scripts need to be run manually by the DBA against the SoftRater database. No other steps are needed.

Oracle Database Update

SoftRater for Java utilizing an Oracle database may require an update script be run against the Oracle database. Upgrading from release 04.07.00 does not require an update.

The Oracle database update file is located in the Database→Oracle→SoftRater - IBSR→Update folder. The file name is usp_IBSR_v04.07.00.oracle. Run the script against the database to update. No other steps are needed.

DB2 Database Update

SoftRater for Java utilizing a DB2 database may require an update script to be run against the DB2 database. Upgrading from release 04.07.00 does not require an update.

The DB2 database update file is located in the IBER download→Database→DB2→SoftRater – IBSR→Update folder. The file name is usp_IBSR_v04.07.00.db2. Run the script against the database to update. No other steps are needed.

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.

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