

Oracle Insurance

Insbridge Enterprise Rating RateManager End User Setup Document

Release 4.8

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INTRODUCTION

RateManager is a component within the Oracle Insurance Insbridge Enterprise Rating (IBER) System that enables users to manage the product definition and modification process, including premium calculation and underwriting rules management.

Prior to using RateManager, users should verify that their computer has:

• Adobe Acrobat Reader v9.0 or higher. Adobe Acrobat reader is required to open certain reports from RateManager.

Users also may need to install:

 An ActiveX Controller to allow certain screens to display properly. Installing the ActiveX Controller requires that temporarily modification be made to browser settings. This is necessary to allow IE to display the install prompt and to add the ActiveX Controller to the browser Add-Ins.

There are two other options that may assist in RateManager users:

- Adding the RateManager URL to their trusted sites to remove URL address bars from the screen.
- Adding RateManager to the Compatibility mode to allow pop-ups to display properly.

ADOBE ACROBAT READER

Adobe Acrobat Reader is required to view select reports in RateManager.

To verify Adobe Acrobat Reader, Click Start->All Programs. Adobe Acrobat Reader should be listed as an available program.





You also may have the Adobe Acrobat Reader icon on your desktop.

Acrobat Reader is available from http://adobe.com/products/reader.html.

No Adobe Acrobat Reader

If you do not have Adobe Acrobat Reader, a message is displayed when you attempt to open the report. The InsbridgeDocument.aspx file can be opened with Adobe Acrobat Reader only.

Windows	5 X]			
0	Windows can't open this file:				
\mathbb{Z}	File: InsbridgeDocument.aspx				
To open this file, Windows needs to know what program you want to use to open it. Windows can go online to look it up automatically, or you can manually select from a list of programs that are installed on your computer.					
(ilce	the Web service to find the correct program				
10 <u>D</u> ele	ect a program nom a list of installed programs				
	OK Cancel				

ACTIVEX CONTROLLER

RateManager requires an ActiveX controller to properly display select menus. The ActiveX controller must be installed on the end user system. You may be prompted to install this controller when you begin to use RateManager.

Installing the Active X Controller is a multi-step process.

- Step 1: The Active X Control must be placed on the end user's computer using the RateManager IE executable.
- Step 2: Internet Explorer settings must be adjusted to allow the Active X Controller to be installed.
- Step 3: The end user must enter RateManager to allow RateManager to install the Active X Controller.
- Step 4: Internet Explorer settings must be returned to the original settings.

Also included are the optional steps:

Option 1: Adding RateManager to Intranet and/or Trusted Sites.

Option 2: Turning on Compatibility Mode for RateManager

Step 1: Placing the Active X Controller

The Active X Control must be placed on the end user's computer using the RateManager IE executable.

The RateManager_IE7_IE8 file is part of the IBRU download and should be distributed by the system administrator. If the file has not been distributed, please log a Service Request using My Oracle Support at <u>https://support.oracle.com/</u>.

- 1. Park the RateManager_IE7_IE8.exe file in a location on your local hard drive.
- 2. Double click the RateManager_IE7_IE8.exe file to run.

🌍 RateManager 3.8 - IE6 ActiveX Control Removal Installation Setup	_ 🗆 🗙
RateManager 3.8 IE6 RateManager ActiveX Control Removal.	
This installation will remove the InsBridge RateManager menu control from your IE6 browser instance. NOTE: This installation should only be executed on any client machine that has used a version of RateManager prior to their installation of IE7.	
Nullsoft Install System v2,30	ncel

- 3. Click Install.
- 4. A success screen is displayed.

🎲 RateManager 3.8 - IE6 ActiveX Control Removal Installation Setup	
Installation Complete Setup was completed successfully.	
Completed	
Show <u>d</u> etails	
Nullsoft Install System v2.30	
< Back	Cancel

5. Close the screen.

Step 2: Adjust IE Settings

Internet Explorer (IE) settings must be adjusted to allow the Active X Controller to be installed. The process is similar for IE8 and IE9. The screens may vary in appearance.

Changing Settings in IE

- 1. Open up IE. Please ensure that you do not have any other windows or tabs open.
- 2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
- 3. Select the Security tab.



4. Select Local Intranet.

- 5. Click the Custom Level option.
- 6. Under ActiveX controls and plug-ins, locate "Download unsigned ActiveX controls."
- 7. Select Prompt. This allows IE to display the install option for the RateManager ActiveX control.

Security Settings - Local Intranet Zone
Settings
 Display video and animation on a webpage that does not use Disable Enable Download signed ActiveX controls Disable Enable Prompt Download unsigned ActiveX controls Disable Disable Frankle
Enable Prompt
 Initialize and script ActiveX controls not marked as safe for s Disable Enable Prompt
Colv allow approved domains to use ActiveY without promot
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to: Medium-low (default)
OK Cancel

- 8. Click OK to close.
- 9. A warning message may be displayed.

Warning	g! 🛛 🔀
۲	Are you sure you want to change the settings for this zone?
	Yes No

10. Click Yes to keep the updates. Once the ActiveX Controller is installed, the option can be returned to the original setting.

- 11. Stay on the Internet Options screen.
- 12. Select the Advanced tab.
- 13. Under Security, check "Allow software to run or install even if signature is invalid."

Internet Options					
General Security Privacy Content Connections Programs Advanced					
Settings Just display the results in the main window Security Allow active content from CDs to run on My Computer* Allow active content to run in files on My Computer* Allow software to run or install even if the signature is invalid Check for publisher's certificate revocation* Check for signatures on downloaded programs Do not save encrypted pages to disk Empty Temporary Internet Files folder when browser is ck Enable DOM Storage Enable Integrated Windows Authentication* Enable memory protection to help mitigate online attacks*					
*Takes effect after you restart Internet Explorer Reset Internet Explorer settings Resets Internet Explorer's settings to their default Resets Internet Explorer's settings to their default You should only use this if your browser is in an unusable state.					
OK Cancel Apply					

- 14. Click Apply.
- 15. Click OK to close the Internet Options screen.

Optional Steps

Adding the RateManager URL to trusted sites removes the URL address bars from the screen. This allows RateManager to utilize the entire screen. These steps can be performed at any time.

Adding RateManager to Intranet and/or Trusted Sites.

- 1. Open up IE. Please ensure that you do not have any other windows or tabs open.
- 2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
- 3. Select the Security tab.

Internet Options					
General Security Privacy Content Connections Programs Advanced					
Select a zone to view or change security settings.					
🛛 🔮 📲 🗸 🚫					
Internet Local intranet Trusted sites Restricted sites					
Local intranet					
This zone is for all websites that are found on your intranet.					
Security level for this zone					
Custom Custom settings. - To change the settings, click Custom level. - To use the recommended settings, click Default level.					
Qustom level Default level					
Reset all zones to default level					
OK Cancel Apply					

4. Select Sites.

5. Click Advanced to view the local intranet sites.



6. Enter the RateManager URL address. This adds RateManager to the List of Intranet sites.

Local intranet	X			
You can add and remove websites from this zon this zone will use the zone's security settings.	ne. All websites in			
Add this website to the zone:				
	Add			
Websites:				
http://10.100.10.100	Remove			
Require server verification (https:) for all sites in this zone				
	Close			

- 7. Close the screen.
- 8. Click OK to close the Local Intranet sites screen.

Adding to Trusted Sites

You can also add the RateManager URL to the Trusted sites listing. This may be helpful if you are accessing RateManager outside of the company network.

- 1. Open up IE. Please ensure that you do not have any other windows or tabs open.
- 2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
- 3. Select the Security tab.
- 4. Select Trusted sites.
- 5. Click the Sites button.

Trusted sites					
You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.					
Add this website to the zone:					
	Add				
Websites:					
http://10.100.10.100	Remove				
Require server verification (https:) for all sites in this zone					

- 6. Enter the RateManager URL address. This adds RateManager to the List of Intranet sites.
- 7. Close the screen.
- 8. Click OK to close the Local Intranet sites screen.

NOTE: If the RateManager URL is not https, you will need to uncheck the https requirement. Close the screen.

Removing the URL Bar on RateManager

If the URL is displaying in your screen and you would like to remove it, you may want to add your IBRU site as trusted site and then enable the option to allow script initiated windows.

- 1. Open up IE. Please ensure that you do not have any other windows or tabs open
- 2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
- 3. Select the Security tab
- 4. Select Trusted Sites.
- 5. Click Sites. A separate screen will be displayed.
- 6. Add your IBRU site as a trusted site. You may need to uncheck the "Require server verification (https:) for all sites in this zone" option.
- 7. Click Close.
- 8. Back on the Security tab, select Custom Level. This opens a separate screen.
- 9. Scroll down to the Miscellaneous section.
- 10. Enable the option to Allow script-initiated windows without size or position constraints.
- 11. Click OK to save your changes here and then Click OK to save all your changes.

IE 8

Internet Explorer 8 uses HTML5, which contains a file upload control that should not reveal the real local path to the file you have selected if you manipulate its value string with JavaScript. Instead, the string that is returned by the script, which handles the file information is c:\fakepath.

In Internet Explorer 8, the real path to the file will be shown only if the page that contains the control is added to the trusted sites collection of the browser.

This means that when using IE8, RateManager users who try to rate a file in the Testing Module, the Releases Module and the Impact Analysis Module may see the file path as C:\fakepath in the XML Input section of the page.

This may be resolved by adding Insbridge as a Trusted Site.

Turning on Compatibility Mode for RateManager

Adding RateManager to the Compatibility list is optional. It may be beneficial to IE9 users to turn on compatibility mode.

- 1. Navigate to Tools->Compatibility View Settings.
- 2. Add the RateManager URL.

Compatibility View Settings	
You can add and remove websites to be display Compatibility View.	yed in
Add this website:	
	Add
Websites you've added to Compatibility View: 10.100.10.100 oracle.com	Remove
☑ Include updated website lists from Microsoft	
Display intranet sites in Compatibility View	
Display all websites in Compatibility View	
	Close

- 3. Click Close.
- **NOTE:** AlthoughIE8 and IE9 64-bit are not supported; the manual enabling of the MCSiMenuCtl Class add-on may be required along with adding RateManager to the compatibility listing to properly view the RateManager screens in 64-bit versions of these browsers.

Step 3: Entering RateManager

The ActiveX Controller can only be installed by accessing RateManager.

- 1. On the IE browser, enter the RateManager URL. The login screen is displayed.
- 2. The Add-on Installer option should be displayed on the login screen. If you receive any other message, please verify that you have updated the IE settings.
- 3. Click Install.

Internet Explorer Add-on Installer - Security Warning				×		
Do you want to install this software?						
	Name: <u>MCSAT Menu Control</u> Publisher: <u>Microsoft Corporation</u>					
× Mor	e options	Install	<u>D</u> on't Install			
1	While files from the Internet can be useful your computer. Only install software from	l, this file type can publishers you tru	potentially harm st. <u>What's the risk</u>	2		

4. The ActiveX Controller is installed when the progress bar at the bottom of the screen is complete.

Step 4: Returning to IE

The setting options required to install the ActiveX Controller are not needed for any other RateManager function. It is strongly recommended that these options be returned to the original settings.

Verifying the ActiveX Controller is Installed and Enabled

- 1. Select Tools->Manage Add-ons. A separate screen is displayed. This is a view only screen.
- 2. Under the Show option, select currently loaded add-ons.
- 3. Verify the ActiveX Controller that RateManager requires, MCSiMenuCtl Class, is listed and enabled.

Manage Add-ons							
View and manage your Internet Explorer add-ons							
Add-on Types	Name	Publisher 🔺	Status	File date	Version	Load time	
📸 Toolbars and Extensions	(Not verified) Microsoft Corp	oration - MCSi					
Search Providers	MCSiMenuCtl Class	(Not verified) Microsoft	Enabled	7/3/1997 10:50	1.0.0.47		
<u>A</u> ccelerators	Microsoft Corporation						
Ma InPrivate Filtering Show: Currently loaded add-ons	XML DOM Document XML DOM Document 4.0 XML DOM Document 3.0	Microsoft Corporation Microsoft Corporation Microsoft Corporation	Enabled Enabled Enabled	6/5/2012 11:47 7/21/2009 1:05 6/5/2012 11:47	8.100.50 4.20.9876.0 8.100.50		
Select an add-on to modify s	tatus or view details.						
Eind more toolbars and extensions Learn more about toolbars and exter	nsions						Close

4. Click Close to close the option.

NOTE: If the add-on is installed correctly, continue updating the IE setting options. If the add-on is not listed, please verify that updates to the IE have been allowed and try installing again.

Failure to Enable

If the add-on is not listed, it may not be enabled. You can manually enable the add-on.

- 1. Select Tools->Manage Add-ons. A separate screen is displayed.
- 2. Under the Show option, select Downloaded controls.
- 3. Verify the ActiveX Controller that RateManager requires, MCSiMenuCtl Class, is listed.
- 4. To enable, right click and select Enable or select the MCSiMenuCtl Class add-on and click the Enable button.

Manage Add-ons											×
View and man	age your Inte	ernet Explorer add-o	ons								
Add-on Types		Name			Publisher 🔺		Status	File date		Version	Lo
St Toolbars and Ex	tensions	(Not verified) Micro	soft Corporation - M	CSi							
Search Provider	s	MCSiMenuCtl Class			(Not verified) Mi	icrosoft	Disabled	7/3/1997	10.50	1.0.0.47	
Accelerators	ng	Sun Microsystems, Java Plug-in 1.6.0_3 Java Plug-in 1.6.0_3 Java Plug-in 1.6.0_3	Inc. 15 15 15		Sun Microsysten Sun Microsysten Sun Microsysten	ns, Inc. ns, Inc. ns, Inc.	Enable Enable Enable	Enable Columns Group By Sort By Copy More Informat)) ion	1.6.0.35 1.6.0.35 1.6.0.35	
Chown Downloaded contro	ols 🗸	<									>
MCSiMenuCtl C (Not verified) Micro	Class pooft Corporation	- MCSi									
Version: File date: Mo <u>r</u> e information	1.0.0.47			Type: Sear <u>c</u> h fo	Ac r this add-on via	tiveX Con a default s	ntrol search pro	vider		Enal	ble
<u>F</u> ind more toolbars Lear <u>n</u> more about	and extensions toolbars and exte	Insions								Cļos	je

- 5. Verify that MCSiMenuCtl Class is enabled.
- 6. Click Close to close the option.

NOTE: AlthoughIE8 and IE9 64-bit are not supported; the manual enabling of the MCSiMenuCtl Class add-on may be required along with adding RateManager to the compatibility listing to properly view the RateManager screens in 64-bit versions of these browsers.

Updating IE to Original Settings

It is strongly recommended that two of the options required to install the ActiveX Controller be returned to the original settings.

- 1. Browse to Tools-> Internet Options.
- 2. Select the Security tab.
- 3. Select Local Intranet.
- 4. Select Custom Level.



5. Under ActiveX controls and plug-ins, locate "Download unsigned ActiveX controls."

Security Settings - Local Intranet Zone	×
Settings	
 Disable Enable Display video and animation on a webpage that does not use Disable Enable Download signed ActiveX controls Disable Enable Enable Prompt Download unsigned ActiveX controls Disable Enable Prompt Enable Prompt 	
 Disable Enable 	
*Takes effect after you restart Internet Explorer	
Reset custom settings Reset to: Medium-low (default) Reset to: Reset	
OK Cancel	

6. Select Disable. This returns the option to the original setting.

WARNING: Leaving Download unsigned ActiveX Controls checked is a security risk. It is strongly recommended that this option be unchecked.

- 7. Click OK to close.
- 8. A warning message may be displayed. Click Yes to update the option.

Warning	g! 🔀
	Are you sure you want to change the settings for this zone?
	Yes No

9. Stay on the Internet Options screen.

10. Select the Advanced tab.

Internet Options					
General Security Privacy Content Connections Programs Advanced					
Settings					
 Search from the Address bar Do not submit unknown addresses to your auto-search pro Just divelop the regular in the main window 					
Security Allow active content from CDs to run on My Computer*					
Allow active content to run in files on My Computer* Allow software to run or install even if the signature is invalid					
Check for publisher's certificate revocation Check for server certificate revocation* Check for signatures on downloaded programs					
Do not save encrypted pages to disk Empty Temporary Internet Files folder when browser is dc					
Chable Dorn Storage Enable Integrated Windows Authentication*					
*Takes effect after you restart Internet Explorer					
Restore advanced settings					
Reset Internet Explorer settings					
Resets Internet Explorer's settings to their default Re <u>s</u> et					
You should only use this if your browser is in an unusable state.					
OK Cancel Apply					

- 11. Under Security, uncheck "Allow software to run or install even if signature is invalid." This returns the option to the original setting.
- 12. Click Apply to accept changes.
- 13. Click OK to close the Internet Options screen.

RateManager is ready for usage.

Failure to Install ActiveX Controller

If you do not install the ActiveX Controller, some pop-ups and right click menus may not be displayed properly. This means that some functions in RateManager will be unavailable or not function as expected.

If you do not allow the "Download unsigned ActiveX controls" option, you will not see the" install Active X" message. This means that you will not be able to install the ActiveX Controller. You may receive a notice that IE blocked the website from installing an ActiveX Controller.



If you do not allow the "Allow software to run or install even if signature is invalid," the ActiveX Controller may not be installed. This means you may still experience issues with some pop-ups and right click menus. You may receive a message that IE found a problem with this file and blocked the installation of the file.

Internet	Explorer - Security Warning 🛛 🛛 🔀
Window	ws has found a problem with this file.
Nar	ne: mcsimenu.cab
Publish	er: <u>Unknown Publisher</u>
	ОК
8	This file was blocked because it does not have a valid digital signature that verifies its publisher. What is a digital signature?

Inside RateManager, if you receive a message that the ActiveX controls could not be displayed, the ActiveX Controller did not install properly. Try installing again. If you continue to experience issues, please contact Support.

Windows 3	Internet Explorer 🛛 🗙
<u>^</u>	One or more ActiveX controls could not be displayed because either: 1) Your current security settings prohibit running ActiveX controls on this page, or 2) You have blocked a publisher of one of the controls. As a result, the page might not display correctly.
	OK

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 <u>http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info</u> or visit <u>http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs</u> if you are hearing impaired.

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