Oracle Insurance

Insbridge Enterprise Rating

RateManager End User Setup Document

Release 4.8

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ORACLE®

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.
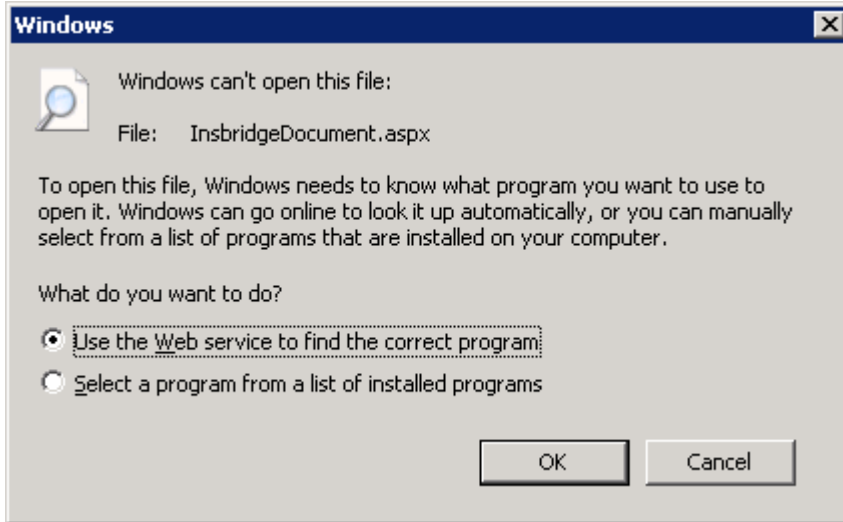

You also may have the Adobe Acrobat Reader icon on your desktop.

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.

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

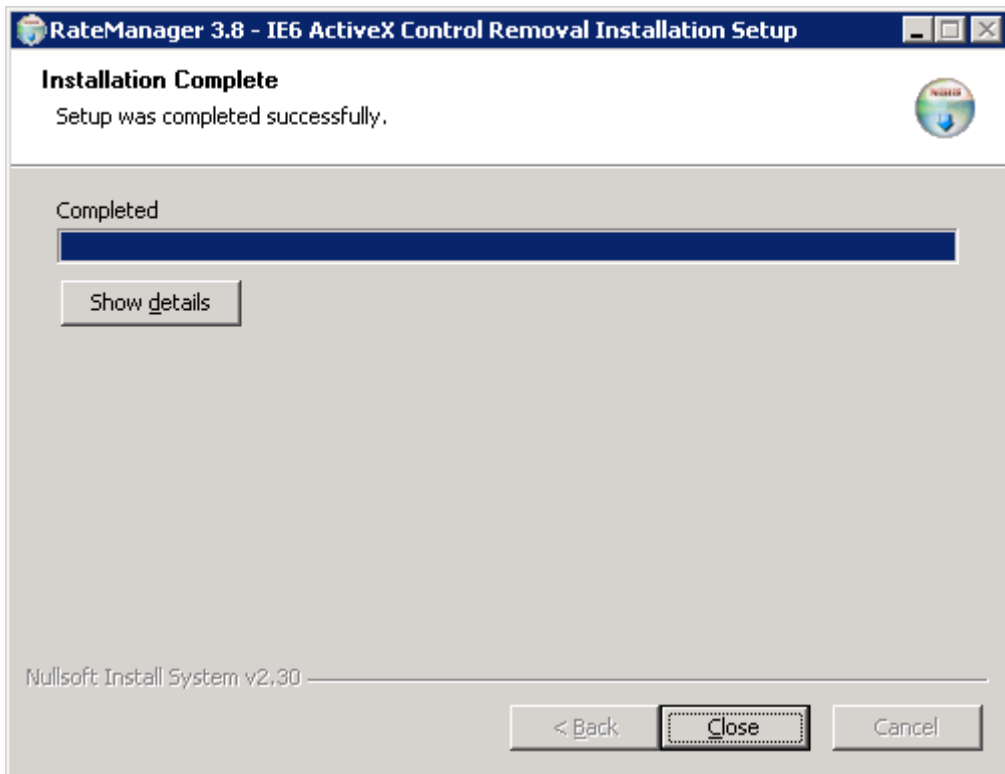## Step 1: Placing the Active X Controller

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 https://support.oracle.com/.

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.
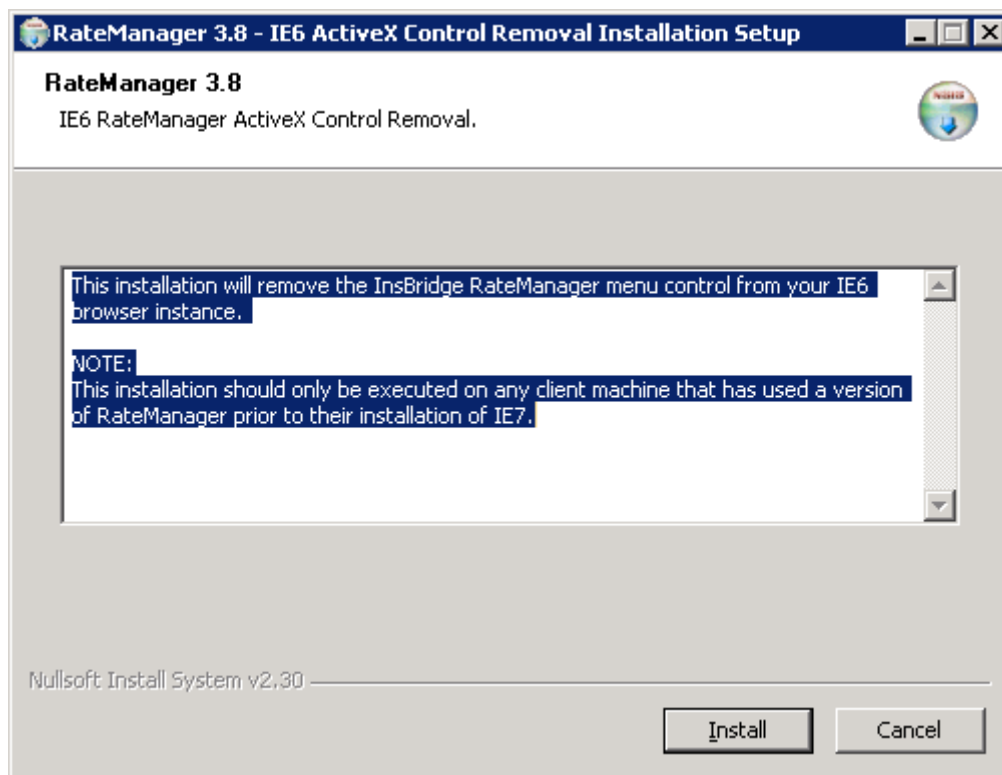
3. Click Install.

4. A success screen is displayed.

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.
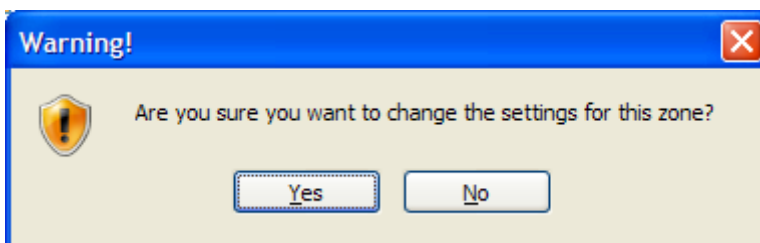
3. Select the Security tab.
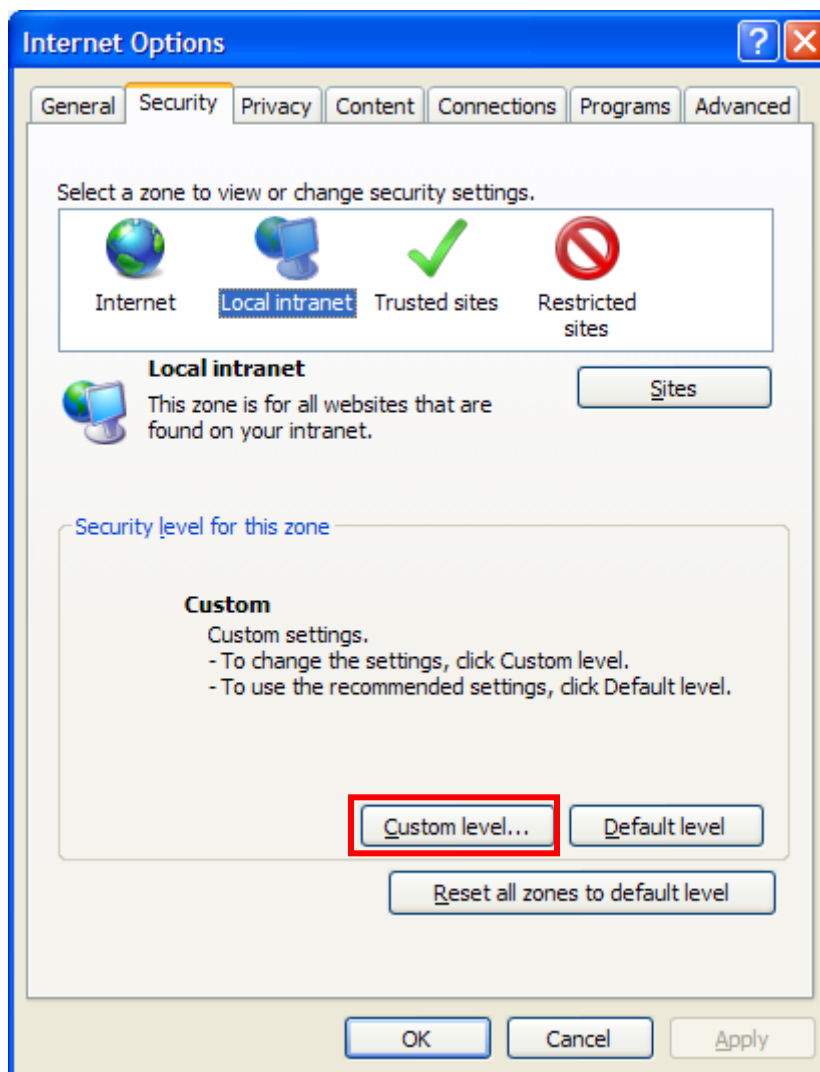
4. Select Local Intranet.

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.
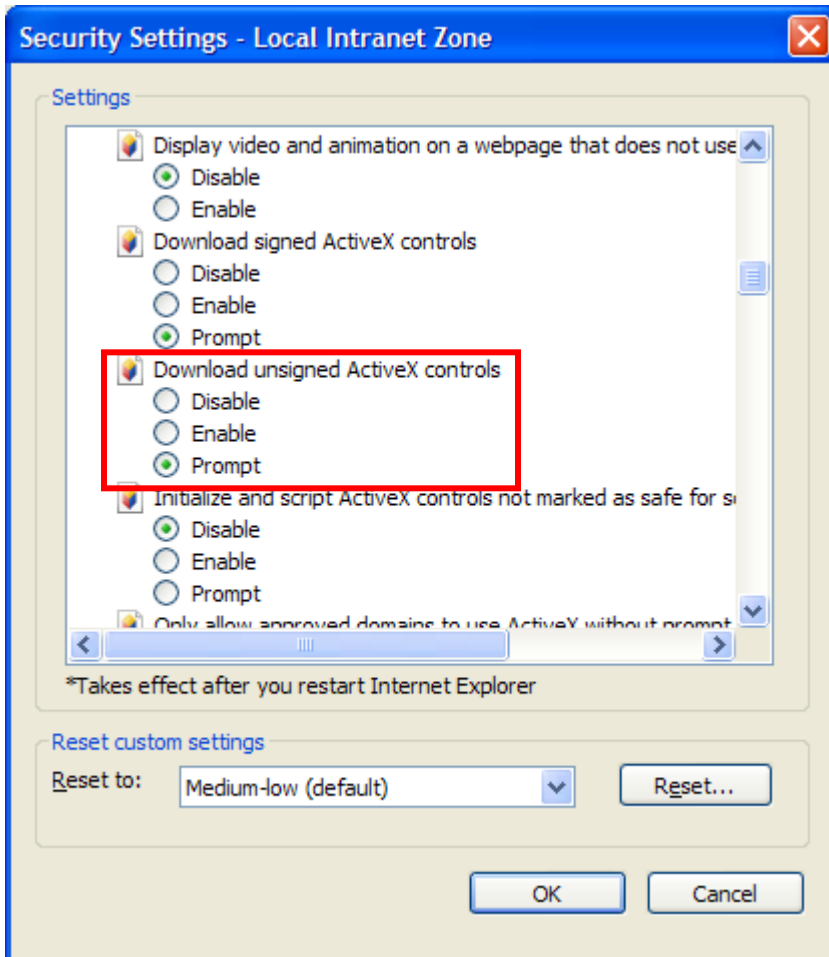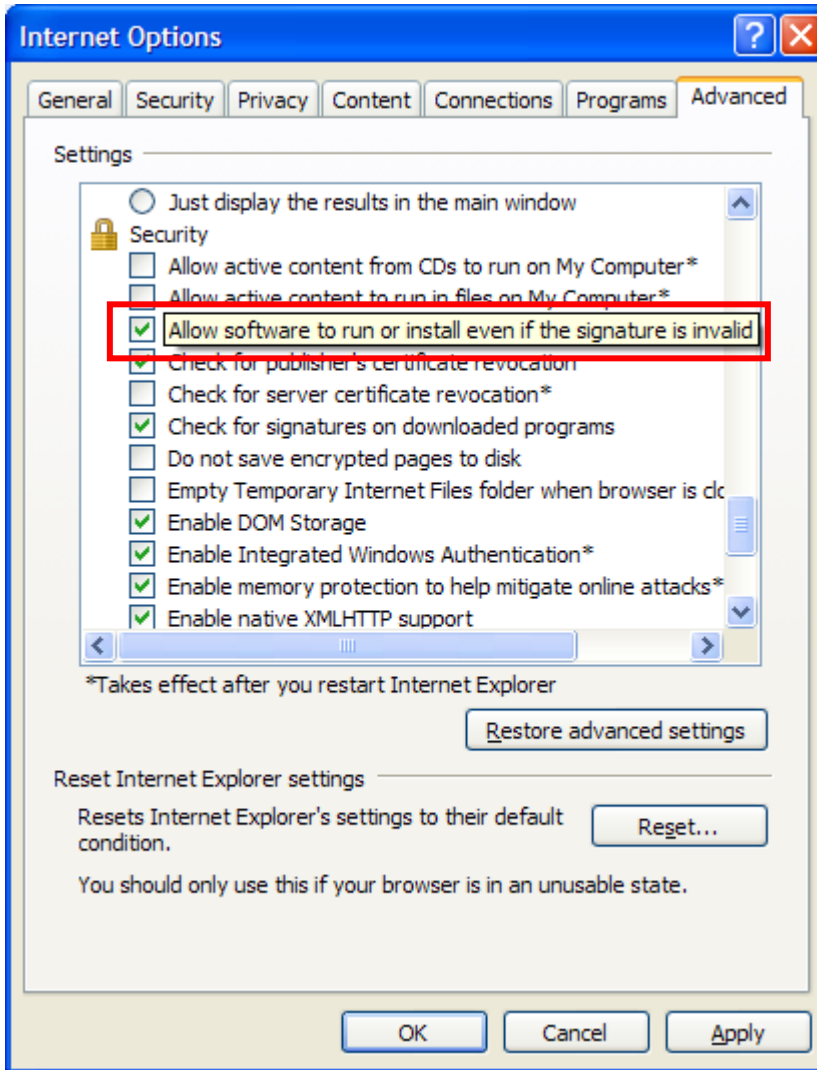

8. Click OK to close.

9. A warning message may be displayed.

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."

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.
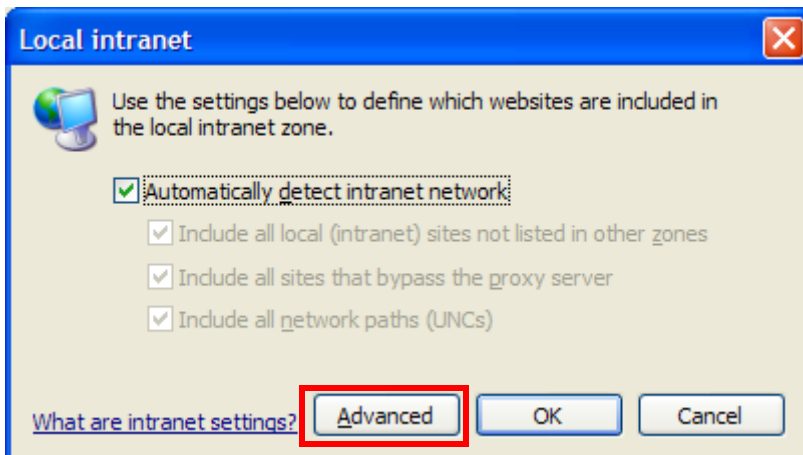
Adding RateManager to Intranet and/or Trusted Sites.

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.
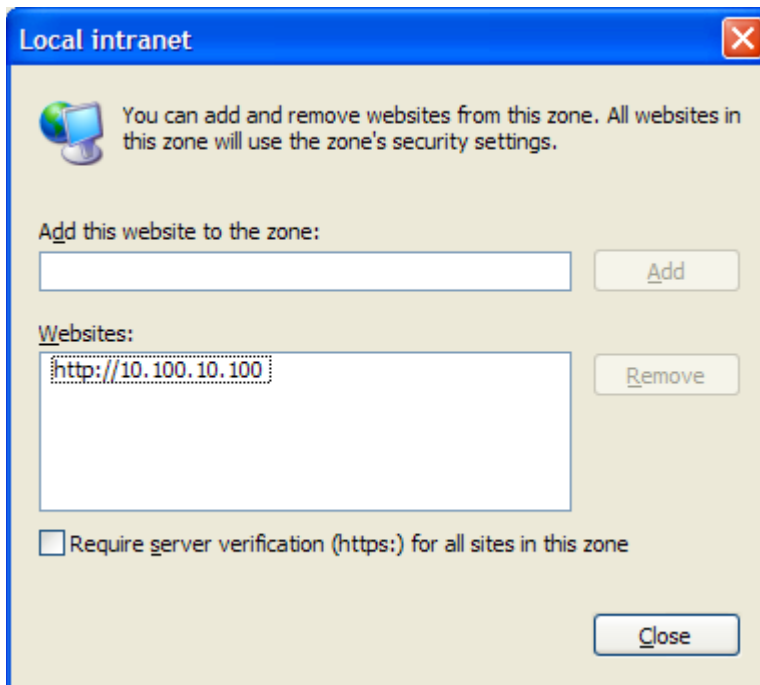
3. Select the Security tab.
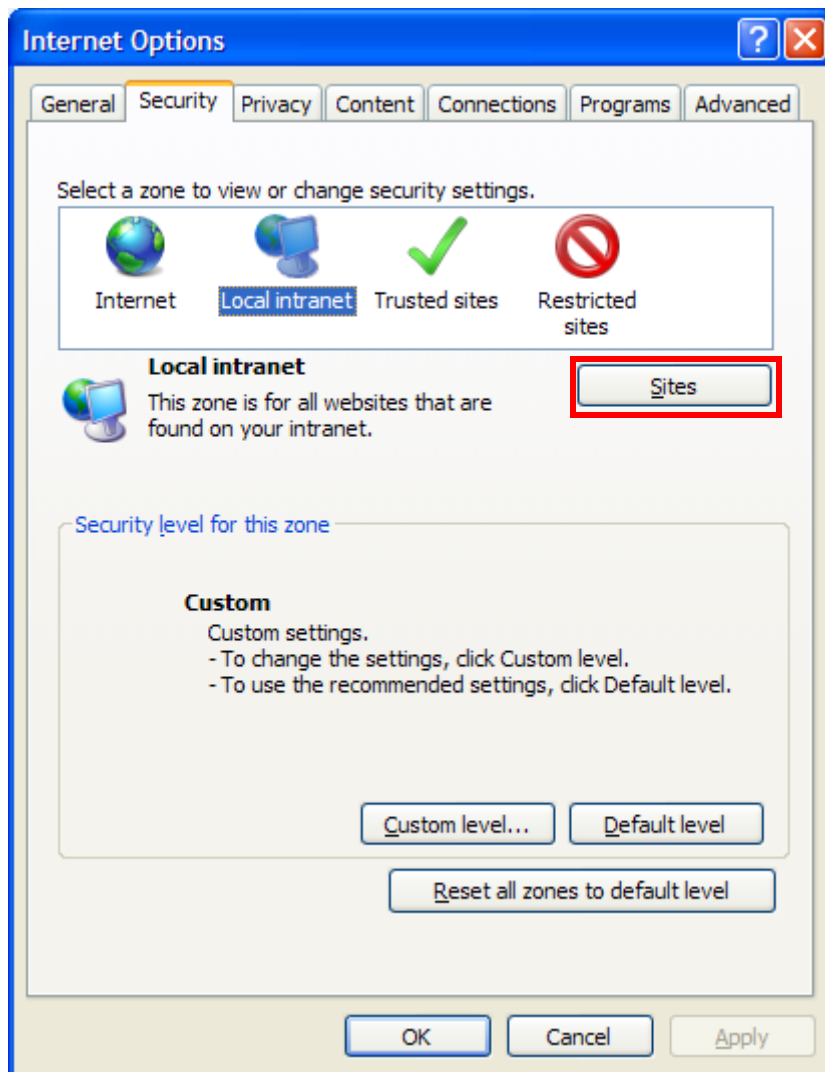
4. Select Sites.

5. Click Advanced to view the local intranet sites.

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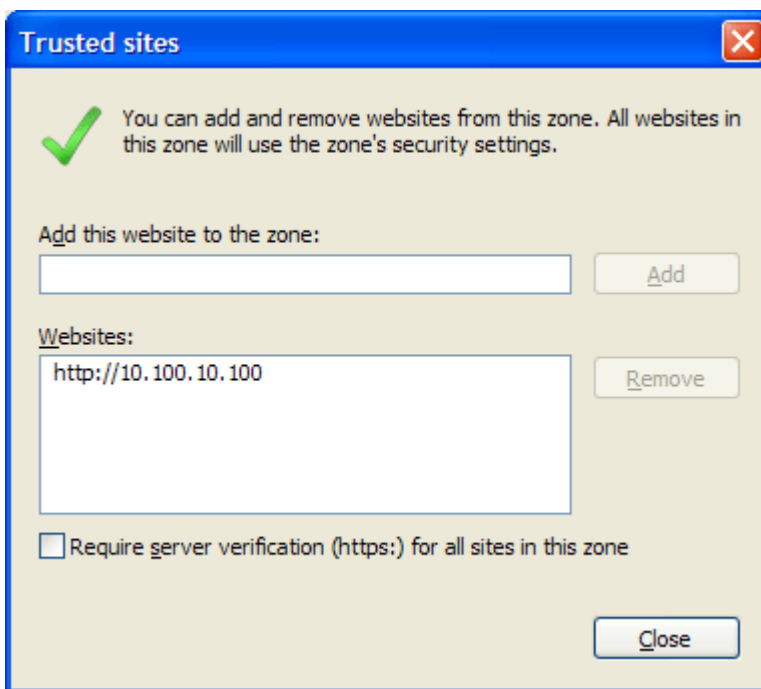
7. Close the screen.

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.

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.
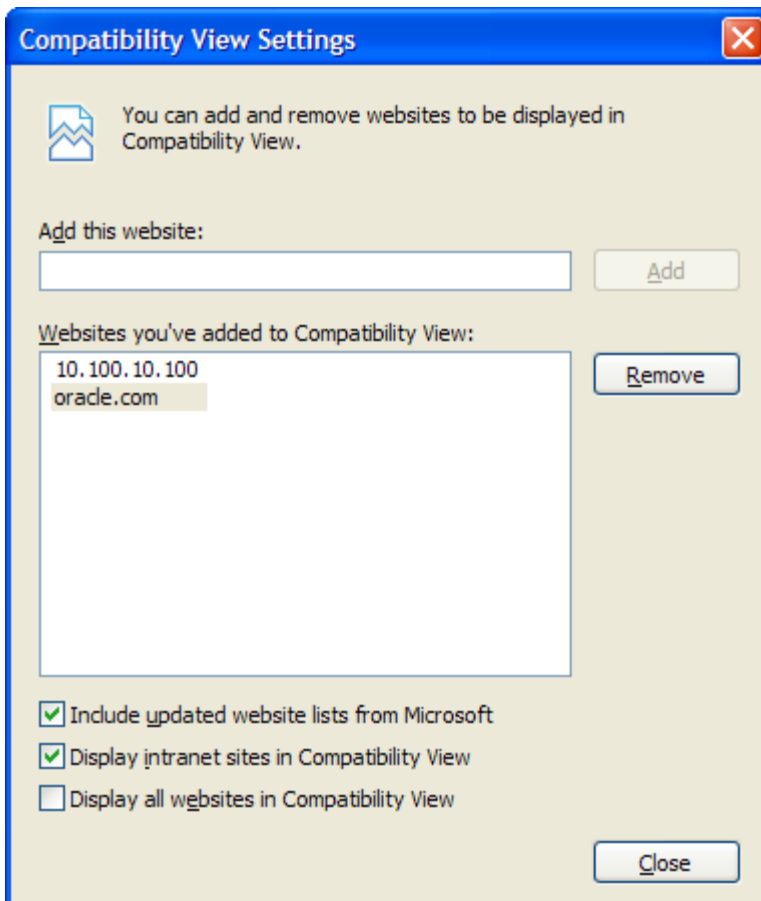
3. Click Close.

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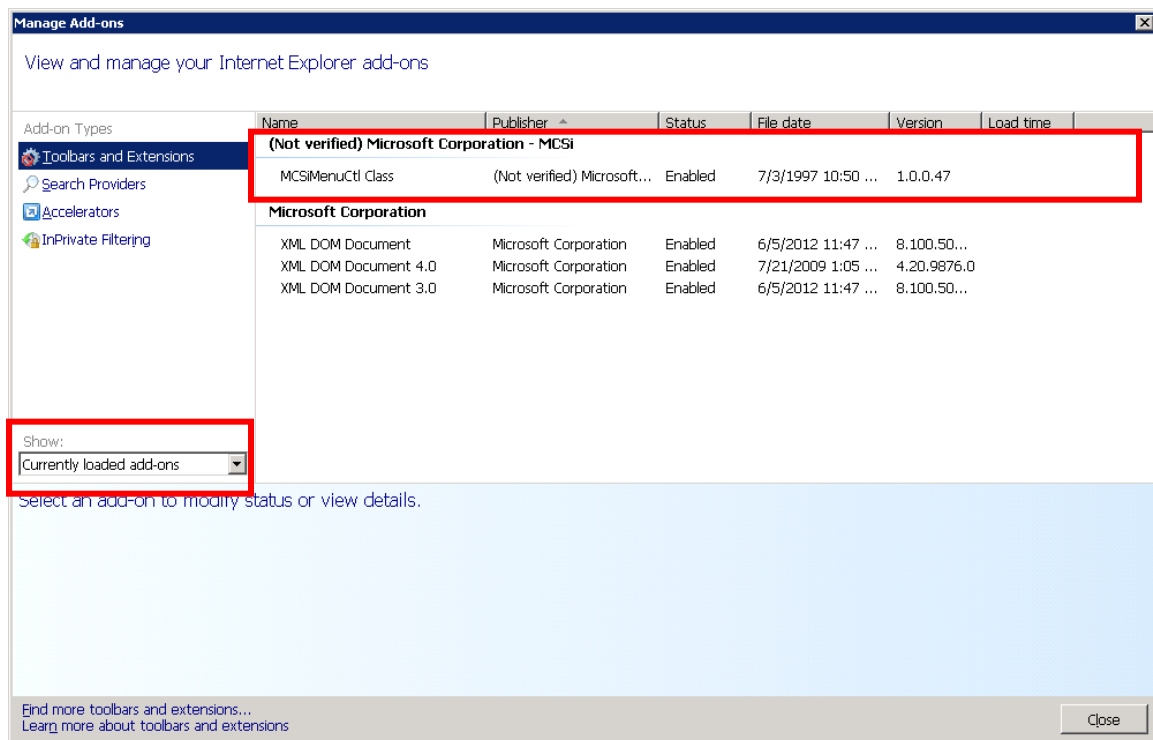
3. Click Install.
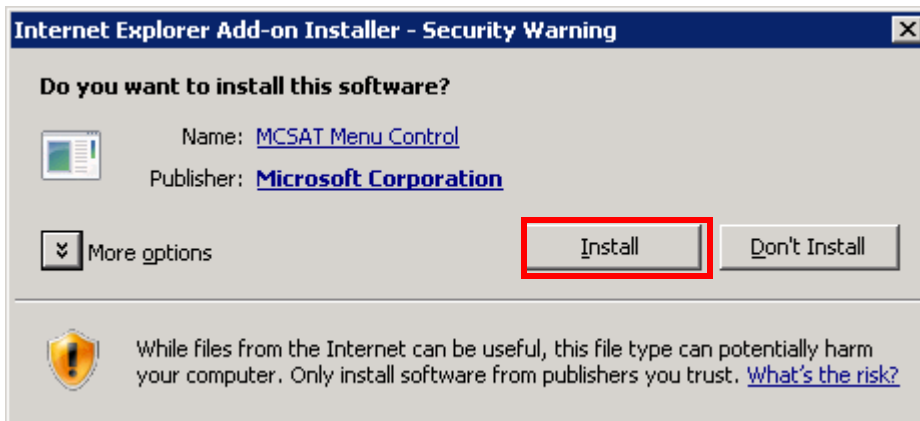
4. The ActiveX Controller is installed when the progress bar at the bottom of the screen is complete.

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.

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.
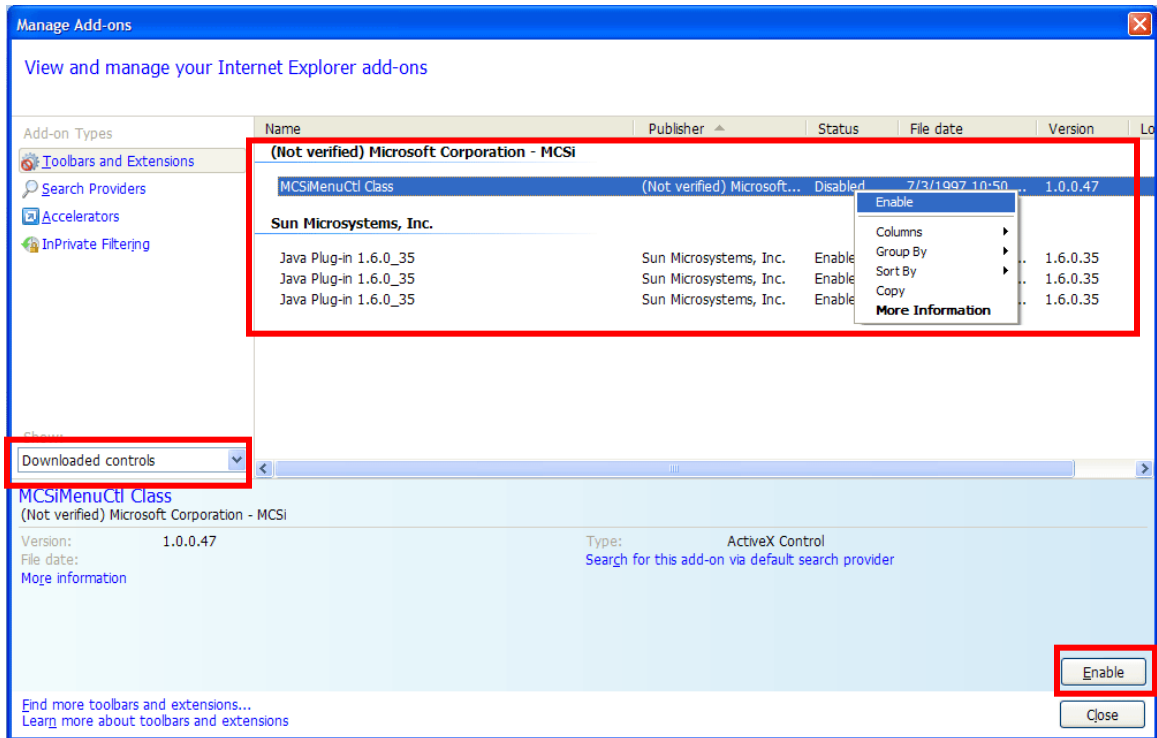
5. Verify that MCSiMenuCtl Class is enabled.

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.*
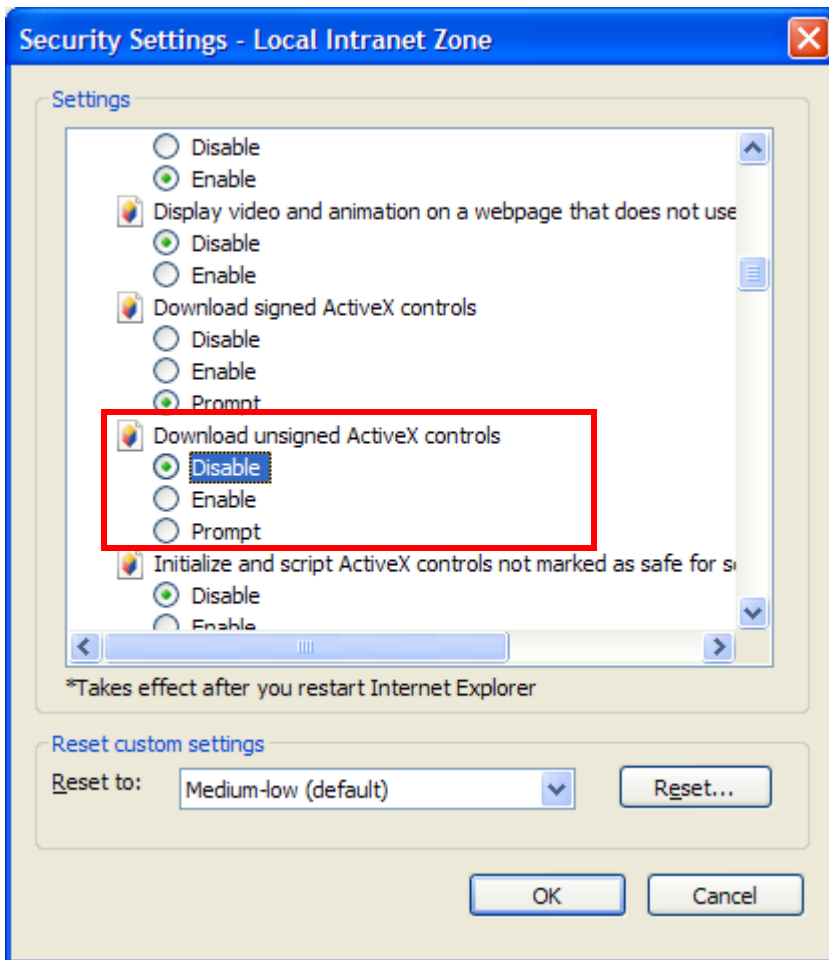
Updating IE to Original Settings

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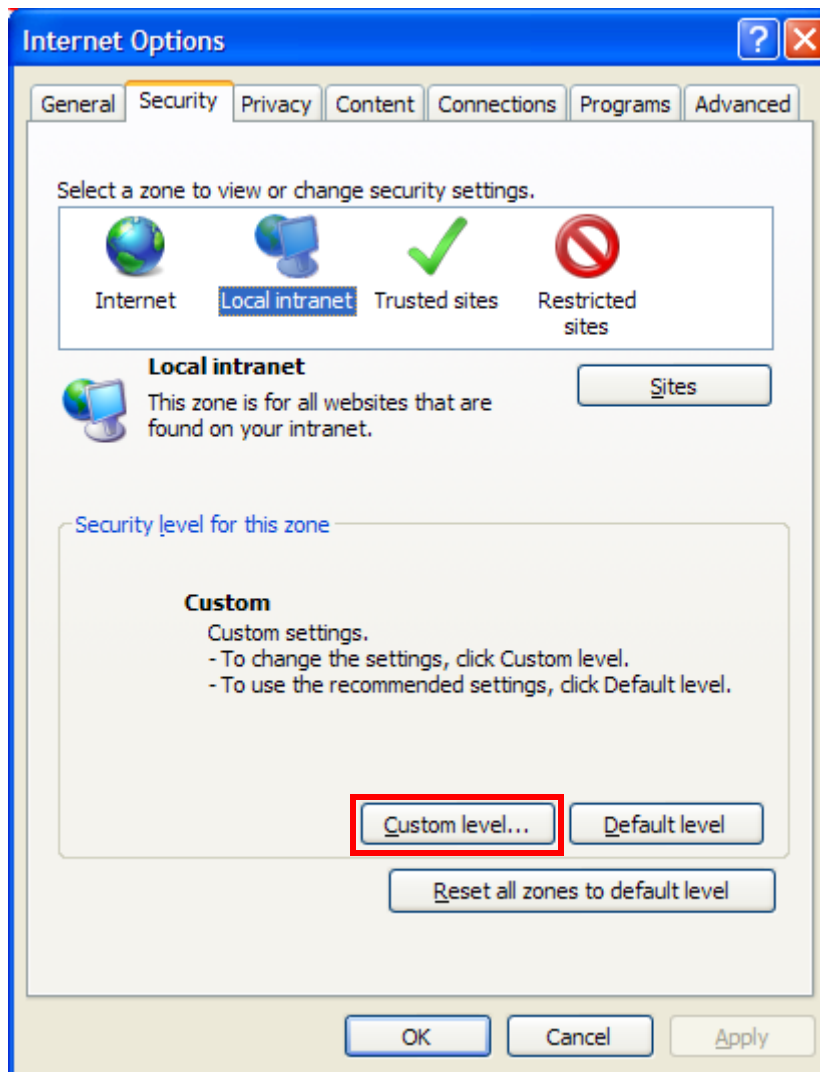
5. Under ActiveX controls and plug-ins, locate "Download unsigned ActiveX controls."

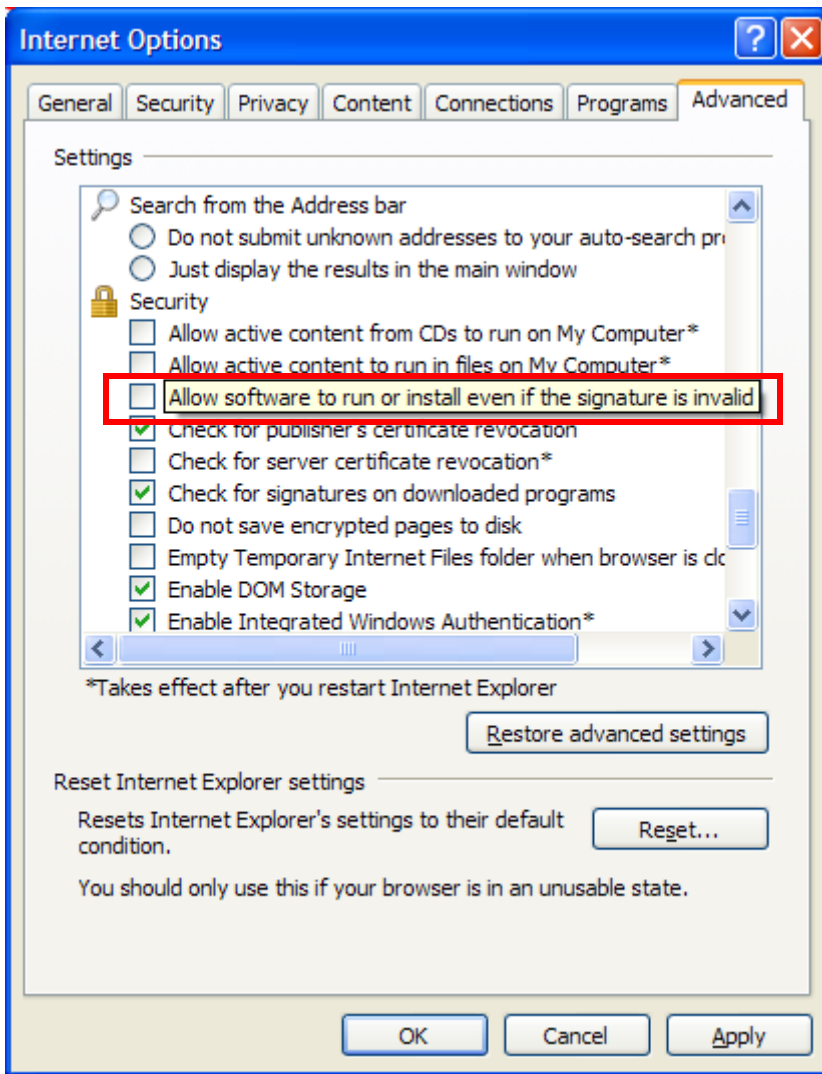6. Select Disable. This returns the option to the original setting.

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.
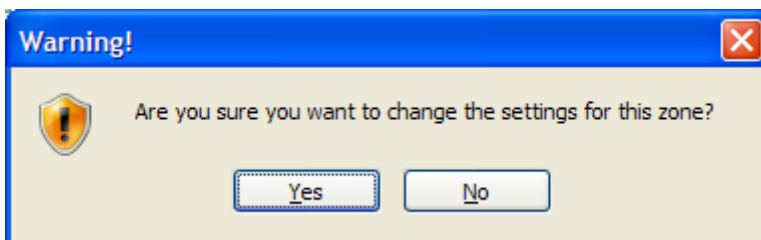
9. Stay on the Internet Options screen.

10. Select the Advanced tab.

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.
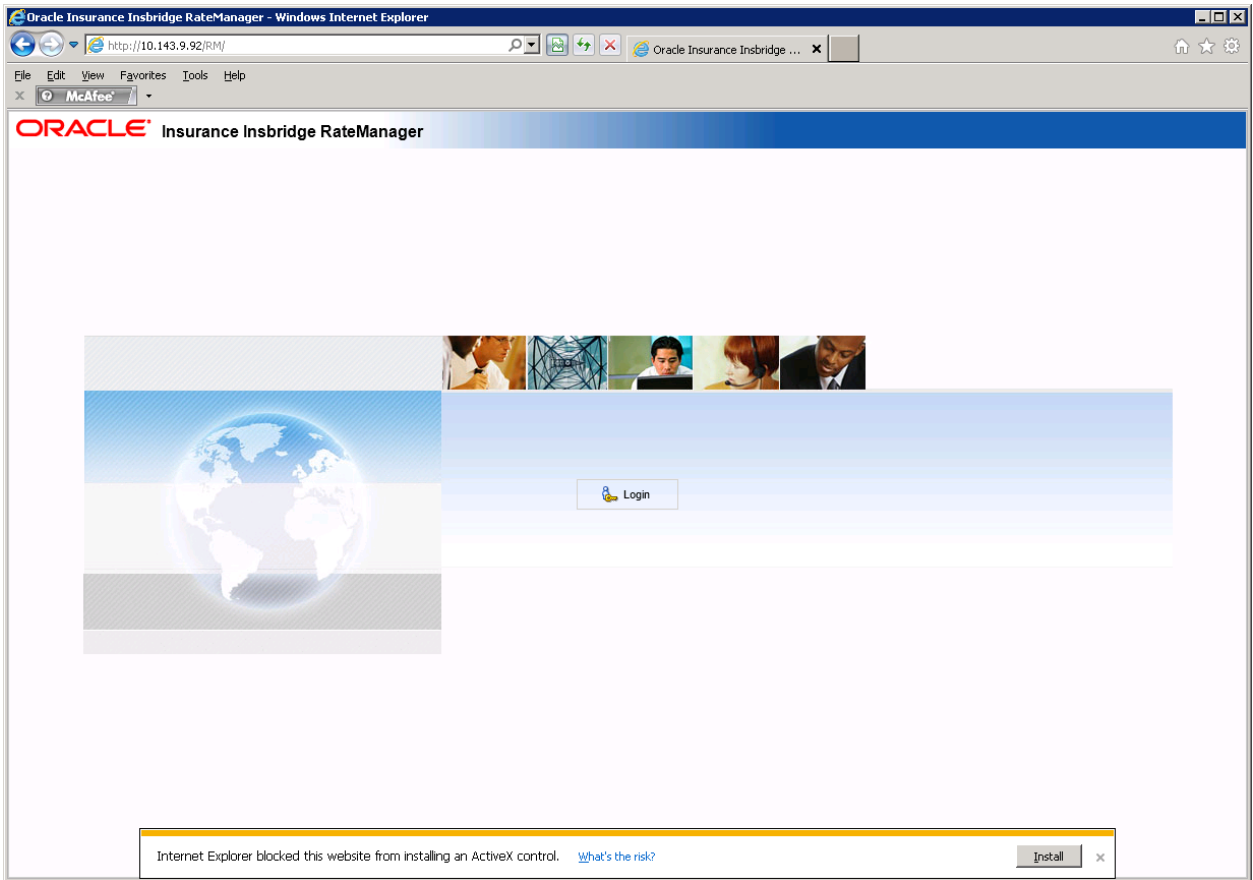
If you do not allow the "Allow software to run or install even if signature is invalid," the ActiveX Controller may not be installed. This means you may still experience issues with some pop-ups and right click menus. You may receive a message that IE found a problem with this file and blocked the installation of the file.
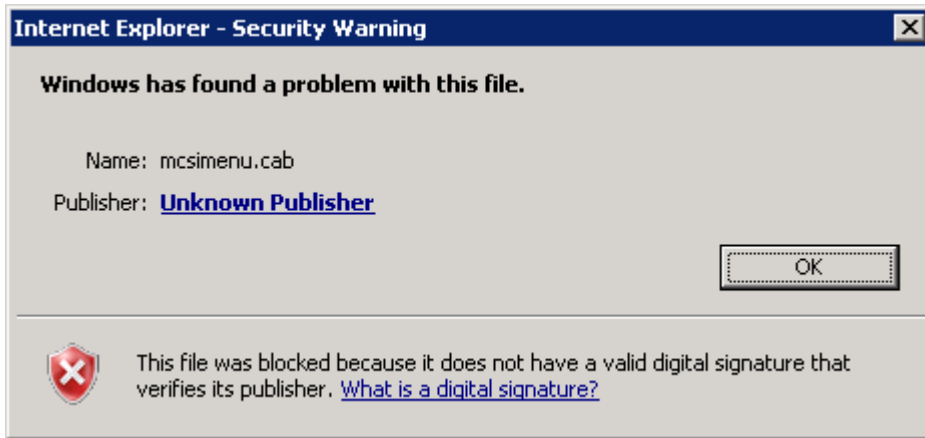
Inside RateManager, if you receive a message that the ActiveX controls could not be displayed, the ActiveX Controller did not install properly. Try installing again. If you continue to experience issues, please contact Support.
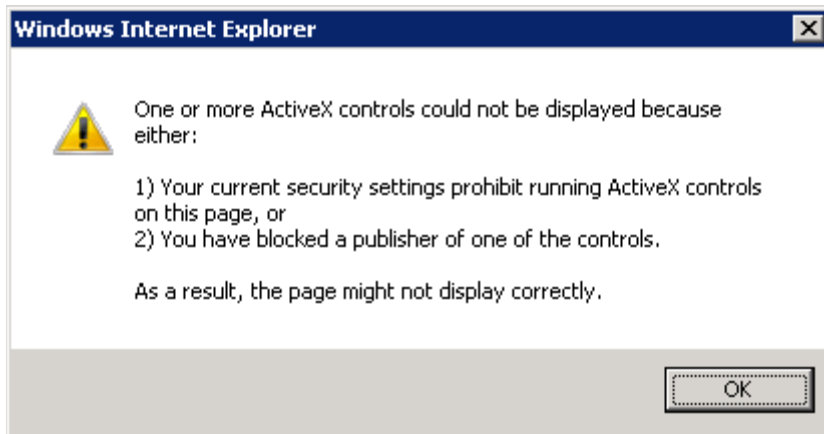
CONTACTING SUPPORT

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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