

**Oracle Insurance**

**Insbridge Enterprise  
Rating**

**Implementing a  
Shared Workfiles  
Location Guide**

Release 4.8

August 2014

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Oracle Insurance Insbridge Enterprise Rating Implementing a Shared Workfiles Location Guide

Release 4.8.x

Part # E54871-01

Library # E54888-01

August 2014

Primary Authors: Mary Elizabeth Wiger

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## PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating Implementing a Shared WorkFiles Location Guide*. The Insbridge Enterprise Rating (IBER) System is a browser-based, multiplatform insurance rating and underwriting technology solution that provides integrated management for every aspect of the rate definition and modification process. This guide assists with the migration and placement of the Insbridge WorkFiles on a network share location.

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**NOTE:** *RateManager and IBFA have been tested on MS Windows 2008 64-bit.*

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## AUDIENCE

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

## RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

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

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

## CONVENTIONS

The following text conventions are used in this document:

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

## Manual History

New editions incorporate any updates issued since the previous edition.

<b>Edition</b>	<b>Publication Number</b>	<b>Product Version</b>	<b>Publication Date</b>	<b>Comment</b>
1 <sup>st</sup> Edition	P01-794-01	R 4.6.1	November 2012	Introduced for release 4.6.1
2 <sup>nd</sup> Edition	P01-794-02	R 4.7	September 2013	Update release
3 <sup>rd</sup> Edition	P01-794-03	R 4.8	August 2014	Update Release

## QUICK VIEW

### IMPLEMENTING A SHARED WORKFILES 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.

Workfiles are rating, pricing, mapping and template files used in various areas of RateManager such as Impact Analysis, Library and Testing.

Workfiles can be moved back to the original location if necessary.

#### Installation Procedures:

**Step 1:** Enter the server where the IBER system has been installed and create a new application pool.

**Step 2:** Assign the Insbridge sites to new application pool.

**Step 3:** Verify that application pool, Insbridge com+ settings, and the Insbridge message service all are set to the Insbridge user.

**Step 4:** On the share server, create a new Workfiles folder. Give the Insbridge user full permission to the new WorkFiles folder.

**Step 5:** Enter the RateManager instance where you want to use the new Workfiles location and update the Preferences screen with the new location. In the network share path that is entered, be sure to include WorkFiles as that last folder in the path.

#### For Previous Installations

This step needs to be performed only if previous Workfiles need to be moved and made valuable to users. If this is a new installation or previous Workfiles are not needed, this step does not need to be performed.

**Step 1:** Copy the previous Workfiles on the server where the IBER system was installed.

**Step 2:** Paste the Workfiles in the new location.

## **SYSTEM REQUIREMENTS**

Administrators should be familiar with managing a Windows server and working with Domains.

- **Access to the server where IBER has been installed**
- **The Insbridge User Account. This is the user used to install Insbridge.**
- **Access to the server where Workfiles will be moved to.**



## STEP 1: CREATING AN INSBRIDGE APPLICATION POOL

Insbridge currently uses the default application pool and requires .NET framework setting of v2.0. Make sure that Static Content is enabled in the Server Manager Roles.

For security reasons, it is recommended that you create a separate Insbridge Application Pool.

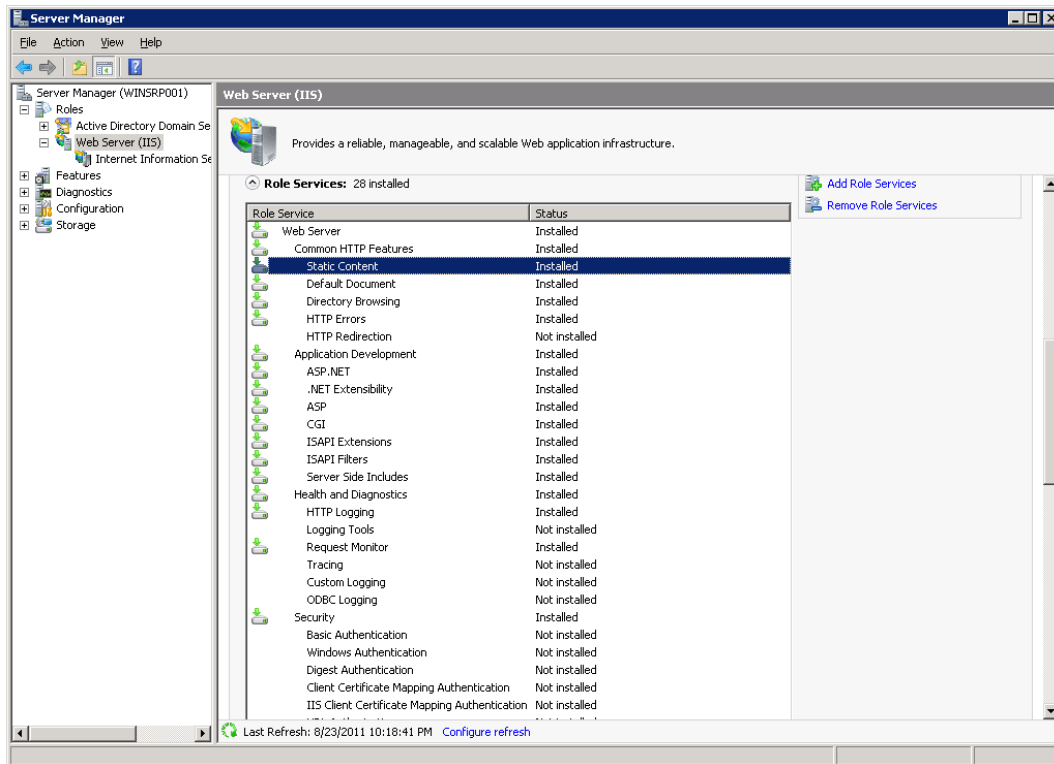


Figure 1 Step 1: Enabling Static Content

**The Insbridge installation must be complete prior to creating an application pool.**

1. Click **Start** → Administrative Tools → select **IIS Manager**.
2. Expand the **Local Computer** and select **Application Pools**. Right click and select **Add Application Pool**.

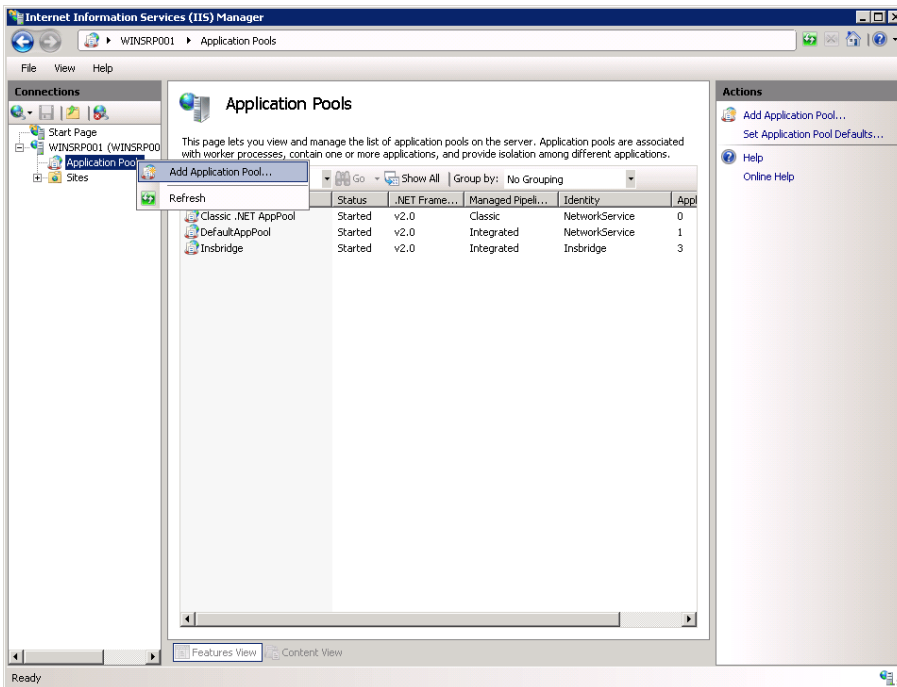


Figure 2 Navigating to Application Pool

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

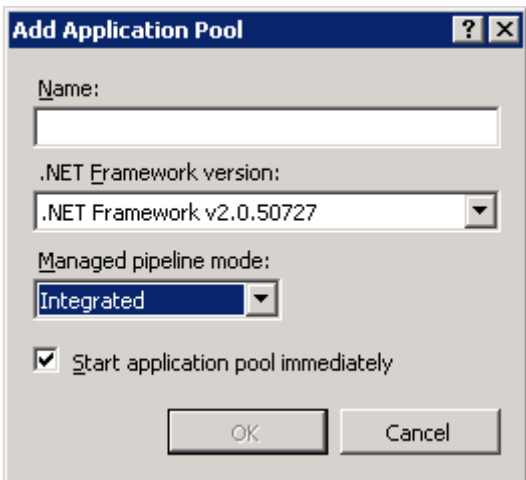


Figure 3 Creating a New Application Pool

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

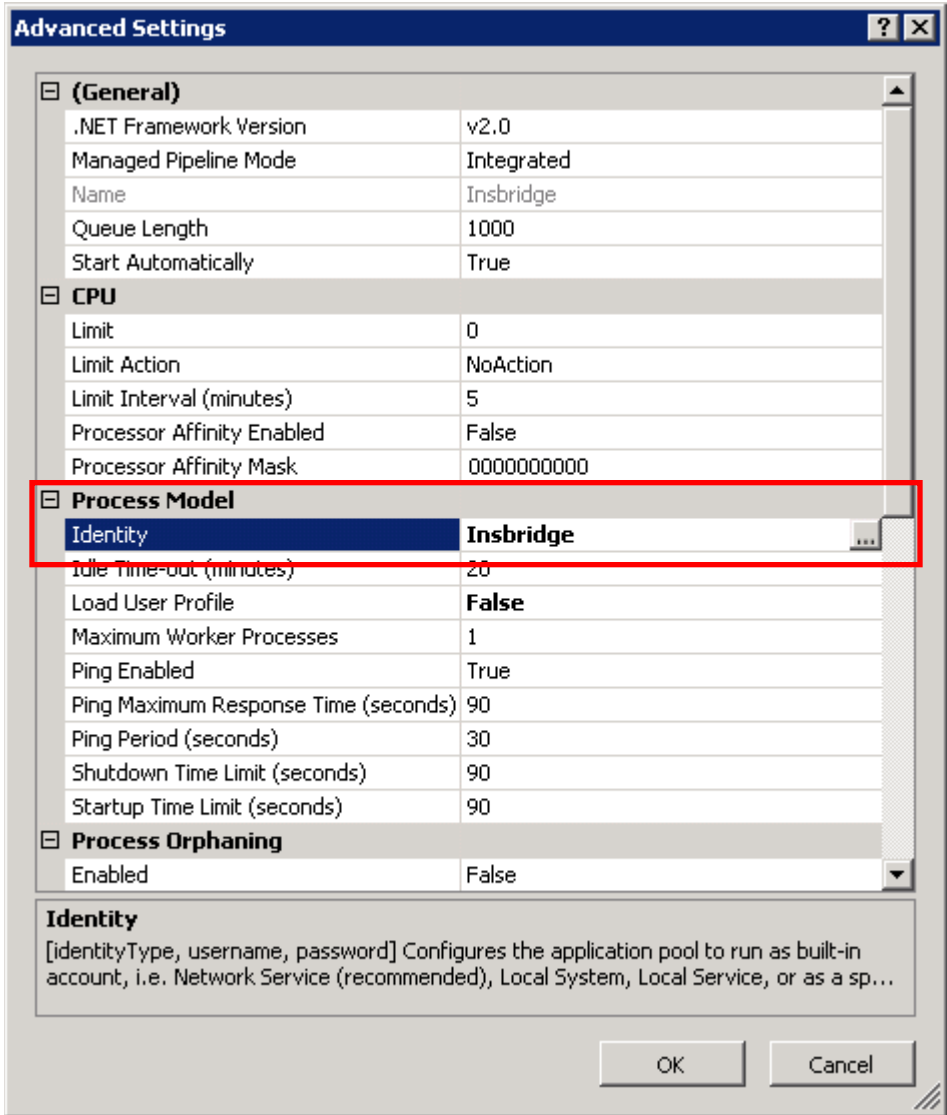


Figure 4 Selecting Application Pool Properties

5. Verify that the .NET Framework Version is v2.0.
6. For the Identity **choose to use custom account and enter the same user that was used to install IBER.**
7. Click **OK** to save your changes.

## STEP 2: ASSOCIATE THE WEB APPLICATIONS WITH THE INSRIDGE APPLICATION POOL

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

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

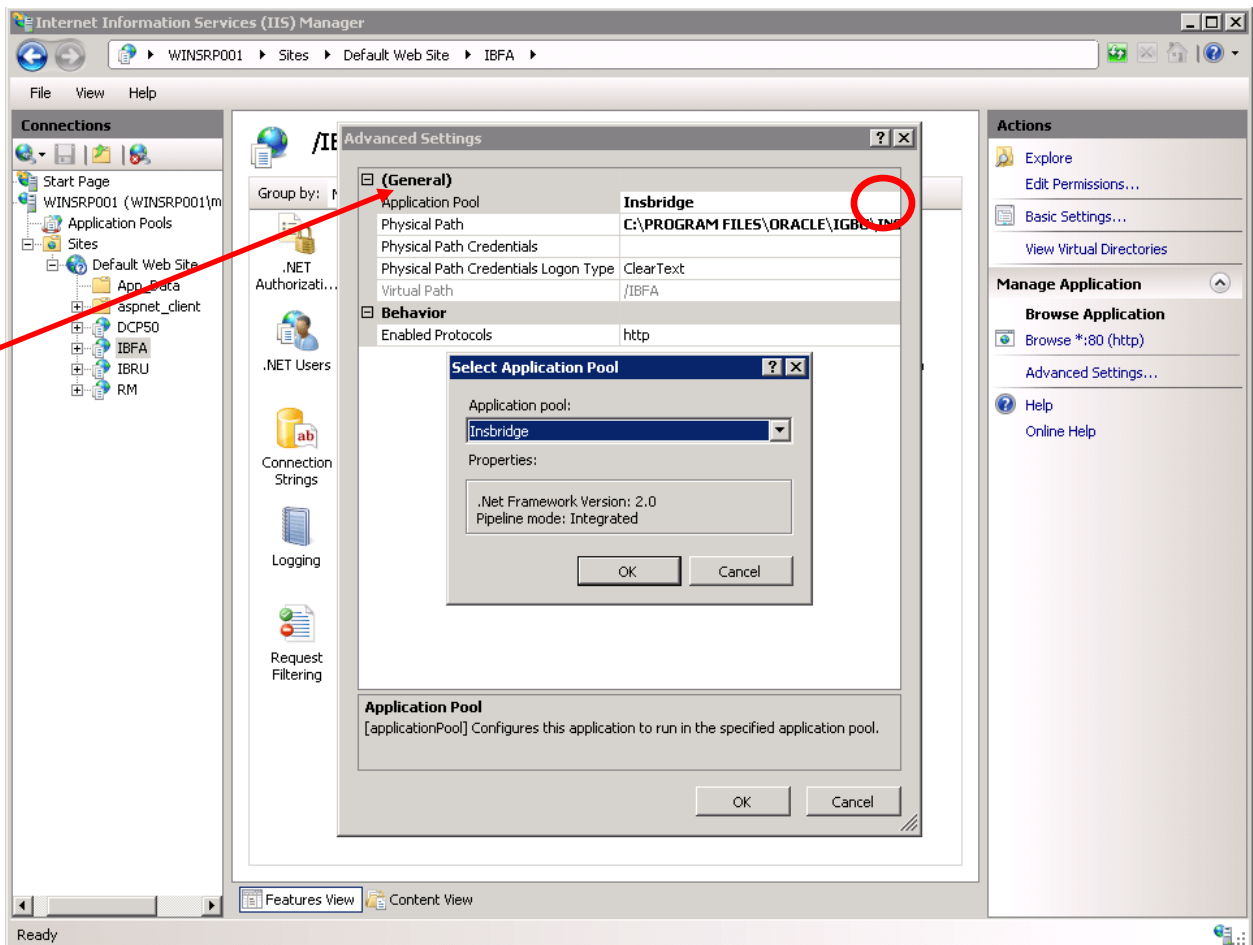


Figure 5 Associating the Virtual Directories with the Insbridge Application Pool

2. Under the General Settings → Application Pool, click the Application Pool entry field to see the ellipsis (...). button.
3. Click the ellipsis button. A separate window is displayed.
4. Select the **Insbridge Application Pool**.

5. Click **OK**. Click **OK** again to close the Advanced Settings window.
6. Repeat for RM, IBRU, and any other SoftLibraries that have been created.
7. Verify that the Insbridge application pool has at least three sites. Select Local Server-> Application Pools.
8. Right click to View Applications. The three Insbridge applications should be listed.
9. Restart IIS. On the IIS screen, **Actions-> Restart IIS**.

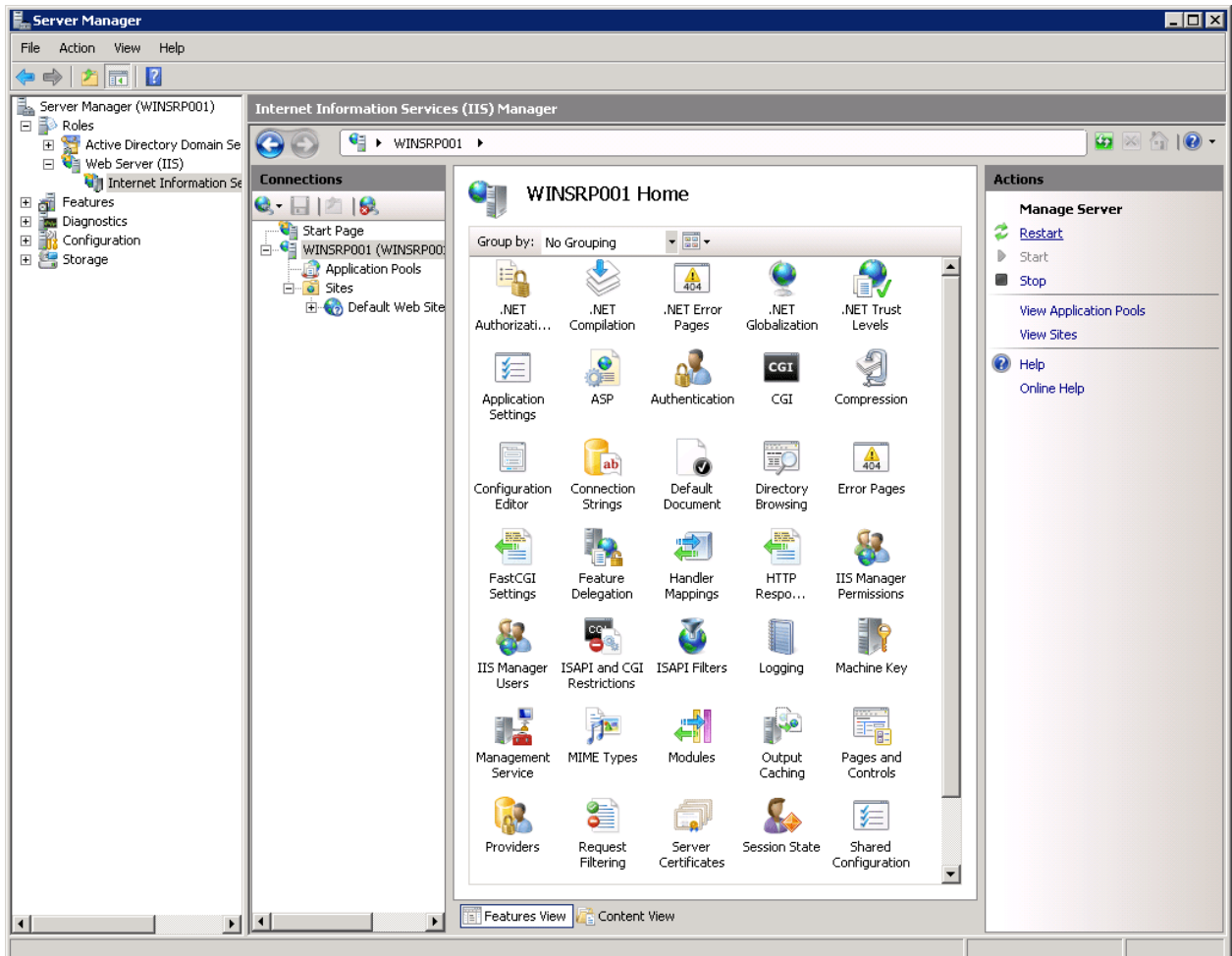


Figure 6 Restarting IIS

## STEP 3: VERIFY INSBRIDGE PERMISSIONS

Verify that application pool, Insbridge com+ settings, and the Insbridge message service all are set to the Insbridge user.

### Application Pool:

1. Select **Start->Administrative Tools-> IIS Manager**.
2. Expand the **Local Computer** and select **Application Pools**. Select the **Insbridge** Application Pool.
3. Right click and select **Advanced Settings**.
4. Make sure the Identity is **the user used to install IBER**.

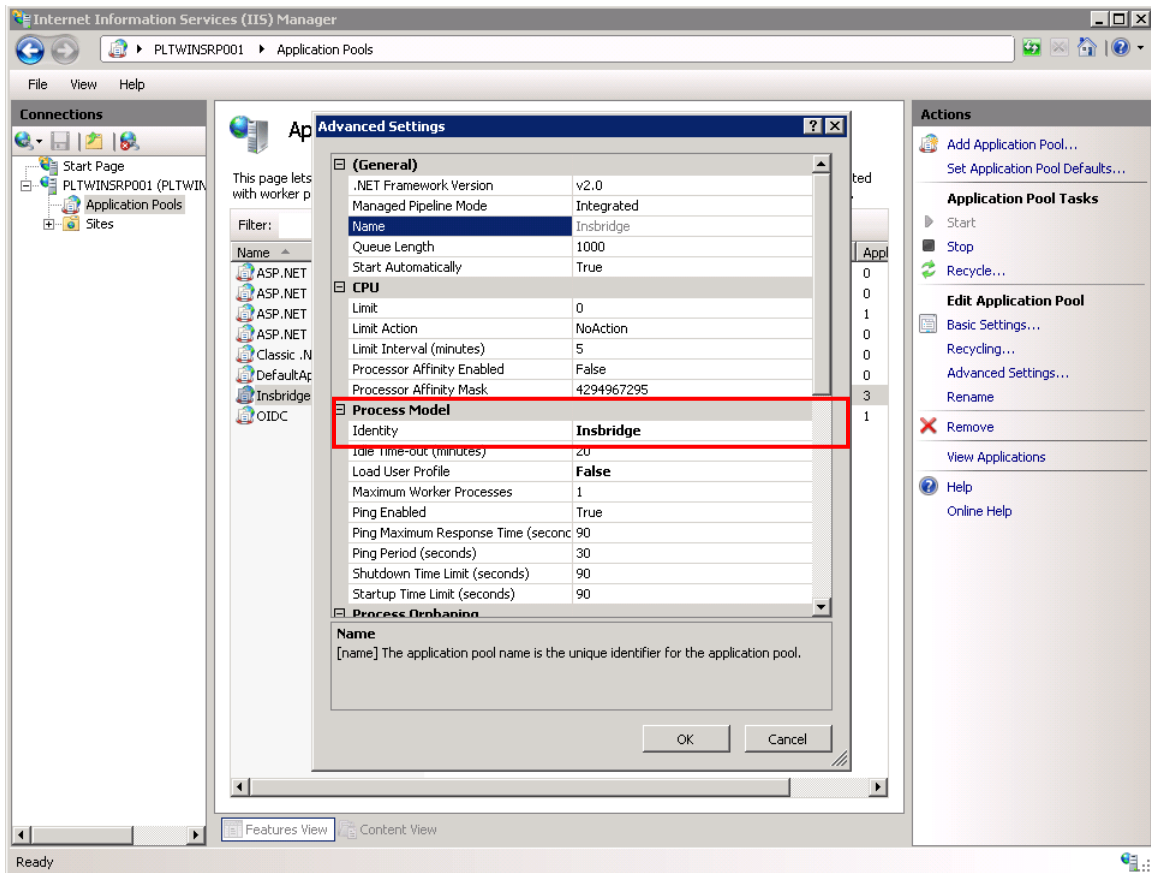


Figure 7 Verifying Ap Pool Identity

## Com + Settings:

1. Select **Start->Administrative Tools-> Component Services**.
2. Expand the **Components Services-> Computers->My Computer->COM + Applications**.
3. Select **Insbridge Com + Administrator 3.5**.
4. Right click and select **Properties**.
5. Select the **Identity** tab.
6. Make sure the Identify is **the user used to install IBER**.

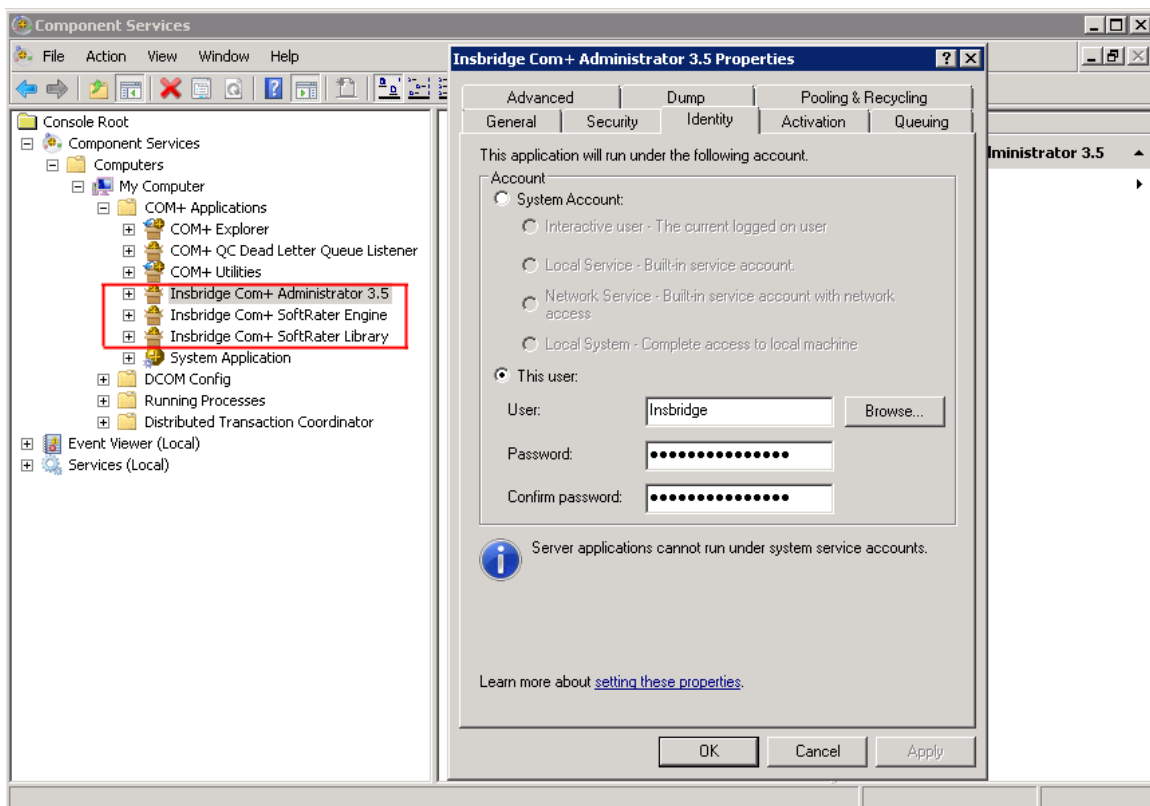


Figure 8 Verifying Com + User

Perform the same steps for **Insbridge Com + SoftRater Engine** and **Insbridge Com + SoftRater Library**.

## Insbridge Message Service:

1. Select **Start->Administrative Tools-> Services**.
2. Select Insbridge MessageQueue Service.
3. Right click and select **Properties**.
4. Select the Log On tab.
5. Make sure the Identity for this account is the user used to install IBER.

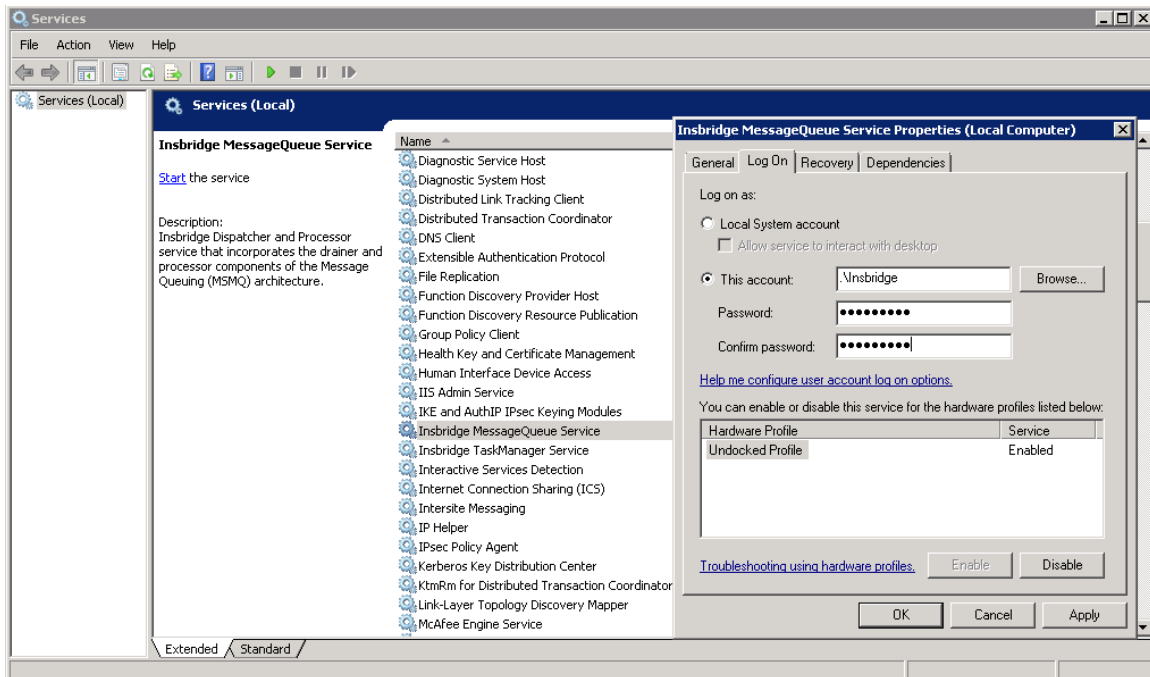


Figure 9 Verifying Insbridge Message Service

If changes were made you will need to stop and start the Insbridge Message service.



## STEP 4: CREATE A NEW WORKFILES LOCATION

On the share server, create a new Workfiles location. This location can be anywhere on the network as long as it is accessible by the Insbridge user.

1. The file must be named Workfiles. You do not have to create any other folders. The other folders will be created when an action is performed in RateManager. The entry is not case sensitive but must match exactly with the entry made in RateManager.
2. Give the Insbridge user full permission to the new WorkFiles location.

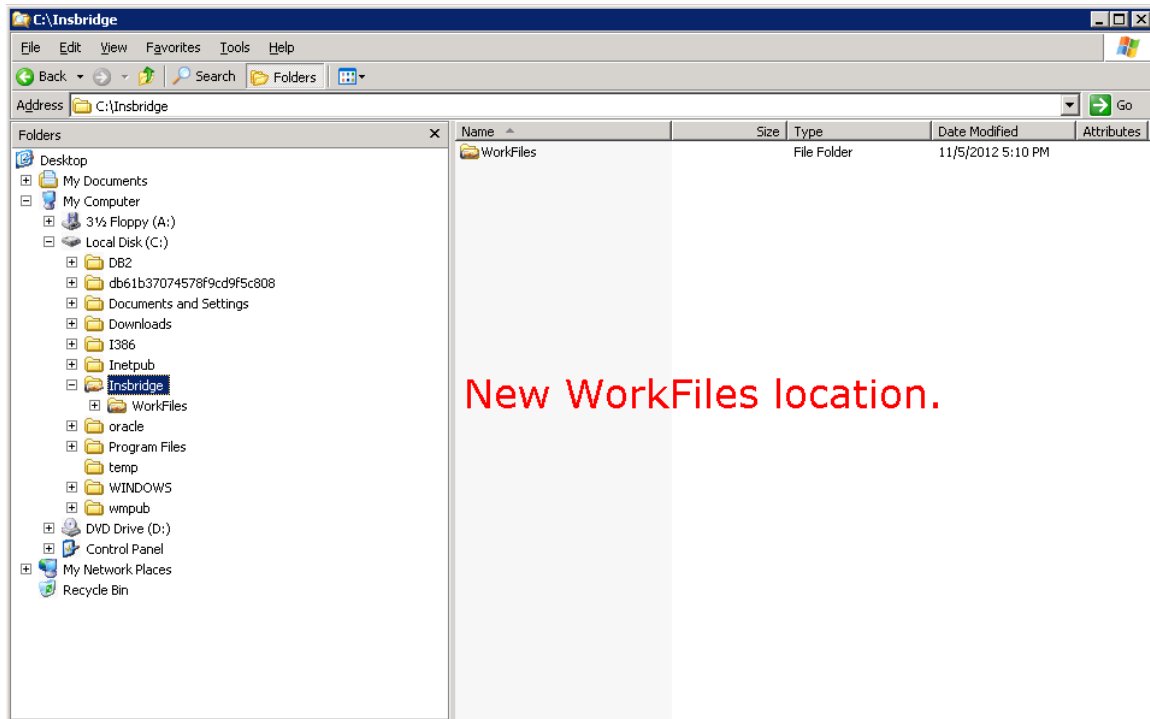


Figure 10 Creating a New Workfiles Location

You also can copy and paste the entire Workfiles folder from the source location and copy it in to the new Workfiles location. The Insbridge user will need full permissions.

## STEP 5 – UPDATING PREFERENCES

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

### To Change Settings

1. Select Tools→Preferences. Select **Web Settings**.

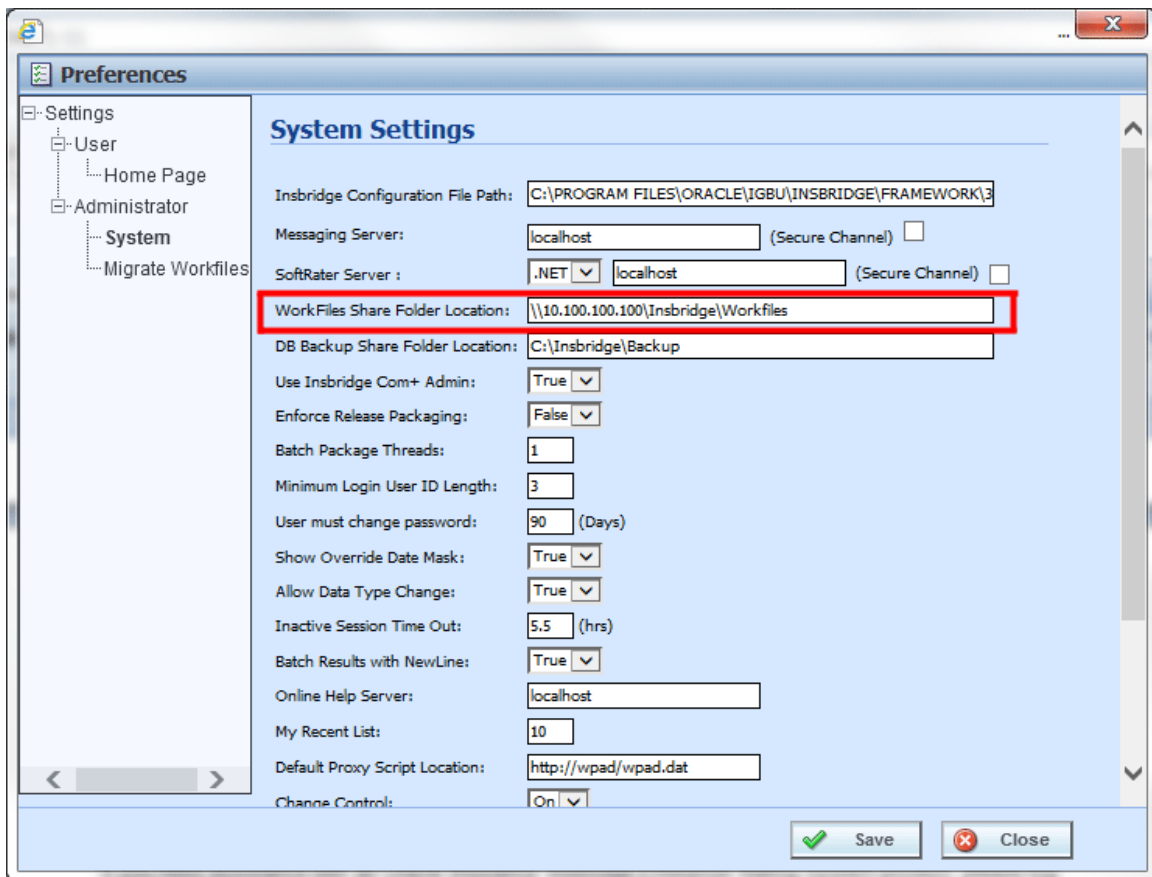


Figure 11 Preferences Settings

2. Enter the location of the new Workfiles in the Work Files Share Folder.
3. When you are finished, click **SAVE** to update your settings.

The location is now available for users.

## OPTIONAL STEP

This step may not be required, depending upon the actions you want to take. If there are existing Workfiles that users require the files will have to be moved to the newly created location.

Copy and pasting files allows users to access work files that were available in previous releases of RateManager. If you do not move work files from previous versions, users will not have access to them.

Work files are rating, pricing, mapping and template files used in various areas of RateManager such as Impact Analysis, Library and Testing.

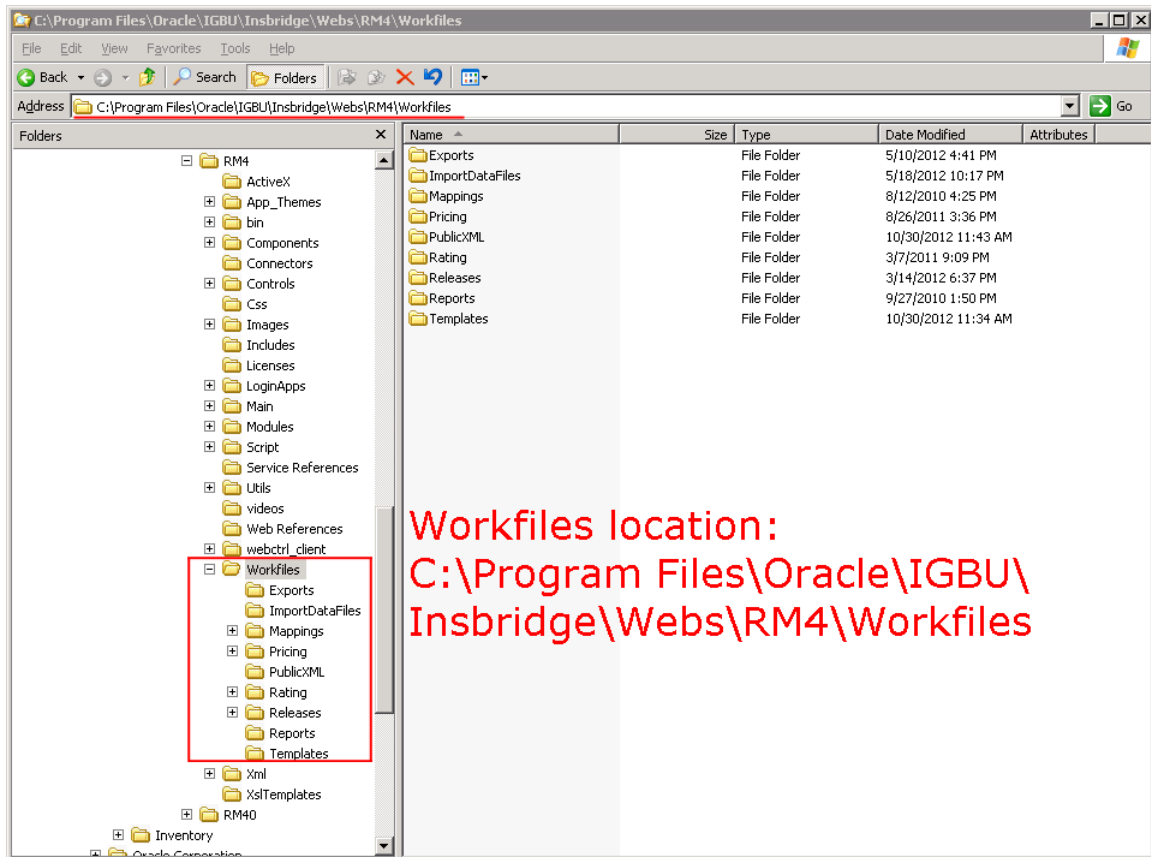


Figure 12 Location of WorkFiles

### File Location:

The location of the files to be copied and pasted and the exact file name will depend upon what version of RateManager you are using. There are three possible locations.

#### For Release 3.12 and earlier:

- **File Name:** WorkFiles
- **Location:** [DRIVE]:\Program Files\InsBridge\Webs\RMxxx\WorkFiles

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

**For Release 3.13:**

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

**For Release 4.0 and after:**

- **File Name:** Workfiles
- **Location:** [DRIVE]:\Program Files\Oracle\IGBU\Insbridge\Webs\RM4\Workfiles

If there are more than one set of Workfiles to be moved, you will have to do multiple copy and paste moves. Make backup copies of any files and store in a safe location. In the unlikely event that an error with the move occurs, you will have backup files that you can place directly in the new Workfiles location or restore to the previous version.

**To Move Workfiles:**

1. Copy the files you want to move.
2. Paste the files into the new Workfiles location.
3. You also can copy the entire Workfiles folder and paste into the new Workfiles location. The permission will need to be updated to allow the Insbridge user full access.

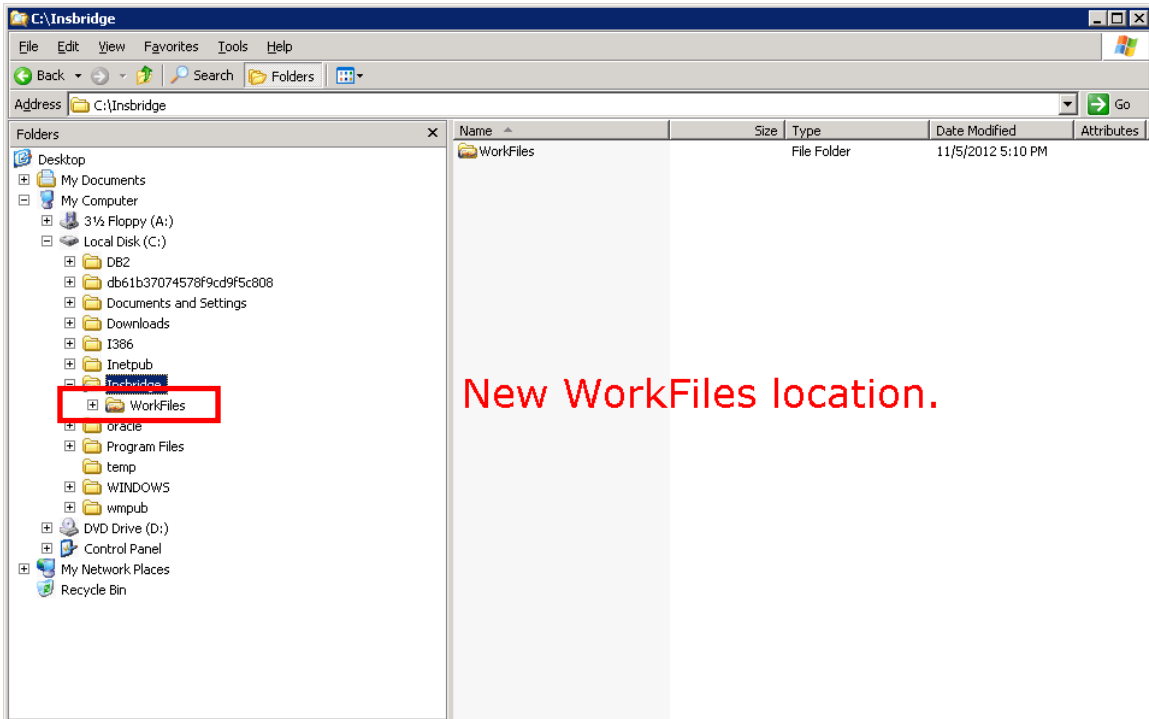


Figure 13 Copying Workfiles

Workfiles in the previous location do not need to be deleted. It is recommended that the files stay in the old location for backup purposes.

## CONTACTING SUPPORT

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

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

**Address any additional inquiries to:**

**Oracle Corporation**  
World Headquarters  
500 Oracle Parkway  
Redwood Shores, CA 94065  
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Worldwide Inquiries:  
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