

**Oracle® Insurance Policy  
Administration**

**Rules Palette  
Environment Connection**

**Installation Instructions – Step 4**

Version 10.1.0.0

Documentation Part Number: E55027-01

June, 2014

Copyright © 2009, 2014, Oracle and/or its affiliates. All rights reserved.

#### Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

#### License Restrictions

##### Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

##### Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

##### Restricted Rights Notice

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

##### Hazardous Applications Notice

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

##### Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

# Table of Contents

<b>OVERVIEW</b> .....	<b>4</b>
Customer Support .....	4
Prerequisites .....	4
<b>DOWNLOAD RULES PALETTE</b> .....	<b>5</b>
Steps to Download the Rules Palette from the Web Application Utility .....	5
<b>CREATE ENVIRONMENT CONNECTION</b> .....	<b>7</b>
Steps to Create an Environment Connection.....	7
<b>LOG ON THE RULES PALETTE</b> .....	<b>10</b>
Steps to Log on the Rules Palette .....	10

## OVERVIEW

The Oracle Insurance Policy Administration (OIPA) application and the Rules Palette application together form a complete solution. A four step installation process is required in order to install and set-up both applications. These instructions represent step four of that process. Refer to the documentation library included with this release for the other three steps of installation.

The Rules Palette can be downloaded from the Rules Palette Web Application Utility. Your build manager will send the URL of the Web Application Utility. You will also receive two or three sets of user IDs and passwords. You will need this information when you create an environment connection in the Rules Palette.

After you have downloaded the Rules Palette and configured the environment connections, you will be able to begin working in the application.

## Customer Support

If you have any questions about the installation or use of our products, please visit the My Oracle Support website: <https://support.oracle.com>, or call (800) 223-1711.

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.

## Prerequisites

- Database of your choice (step one of installation process)
- OIPA deployed on a server of your choice (step two of installation process)
- Web Application Utility deployed on a server of your choice (step two of installation process)
- Microsoft Windows XP or later
- Rules Palette uploaded on Web Application Utility (step three of installation process)
- URL for the Rules Palette Web Application Utility. This will come from your build manager.
- A Web Application Utility username and password. This will come from your build manager
- Rules Palette username and password. This will come from your build manager.
- Database username and password. This will come from your build manager.
- IVS database username and password. This will come from your build manager. This database information is only necessary if you are using an IVS environment.
- Location of the database driver. Each type of database requires a specific driver(s). You will need to point to the location of the driver(s) during the environment creation. This will come from the build manager.

## DOWNLOAD RULES PALETTE

The following steps describe the procedure for downloading the Rules Palette from the Rules Palette Web Application Utility.

---

**Note:** If you are accessing the Rules Palette through a remote desktop then contact your build manager for connection instructions.

---

### Steps to Download the Rules Palette from the Web Application Utility

1. In your browser, go to the URL of the Web Application Utility as provided by your build manager.
2. Log in to the Web Application Utility using login credentials provided by your build manager.
3. Navigate to **Palette Versions > Download**.
4. Click **Download** next to the version of the Rules Palette that you want to download.



Web Application Utility Download list

5. Click **Open** from the File Download window when it asks what you want to do with the file. It will take a few minutes for the file to download. Once the file has been downloaded, it should automatically open with the compression software that is available on your system. If you do not have compression software, contact your IT department.
6. Extract the files using your compression software and save the files to your local computer in the following folder:

C:\Program files\Oracle\RulesPalette

---

**Note:** You may need to create a folder called Rules Palette within C:\Program Files\Oracle if one does not already exist.

---

7. Launch the Rules Palette via the executable file **asgraphicruleside.exe**. This file will run the Rules Palette. To launch the application, double-click on the executable file. This executable file can be found in the following directory:

C:\Program Files\Oracle\RulesPalette\bin

8. Create a shortcut on your Desktop. This will make it easier to access the Rules Palette. To create a shortcut, right-click on the *asgraphicruleside.exe* file (*C:\Program Files\Oracle\RulesPalette\bin*) and select **Create Shortcut**. Once the short-cut appears, drag it out onto your desktop.

## CREATE ENVIRONMENT CONNECTION

After the Rules Palette has been downloaded, you need to open the application and create an environment connection. All of the environment connection information will automatically populate once you enter the appropriate user names and passwords. User names and passwords can be obtained from your build manager.

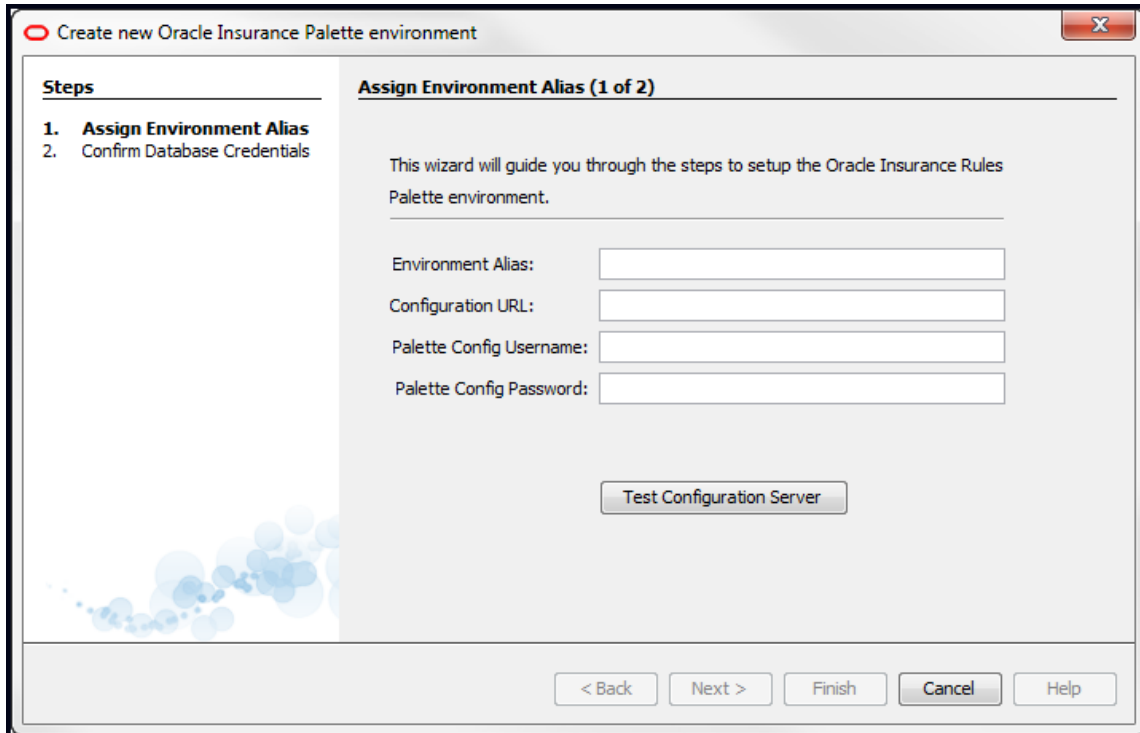
### Steps to Create an Environment Connection

1. Double-click the Rules Palette short-cut icon you created on your desktop.
2. Click the **Main Explorer** tab.
3. Right-click inside the tab and select **Create Environment from Web Service**.



Rules Palette Right-Click Menu Option for Environment Creation

The environment creation wizard screen appears.



Step 1 of environment creation wizard

4. Enter an **Environment Alias**. This should be a descriptive name for the environment that will allow you to distinguish between the environments you create. Only alphabet characters are allowed in the name. Numbers and special characters are not supported.
5. Enter the **Configuration URL** information provided by the build manager.
6. Enter the **Palette Config Username**. This is a username used to log in to the Web Application Utility.
7. Enter the **Palette Config Password** for the username used in the previous step.
8. Click **Test Configuration Server** to test your environment connection. If the connection is successful, click **Next** and advance to step 11. If your connection fails, contact your build manager.

---

**Note:** If you receive an error message that says your user name and password are incorrect, check your configuration URL as well. There are instances where errors in these fields also trigger the user name and password error.

---

9. Browse to the location of the jdbc driver files. The location should be in the Rules Palette .zip file in the database driver folder. (SqlServer uses a jtds-jar and DB2 uses two jar files beginning with db2\_\*\*\*.jar.) You will only need to specify the jar file location the first time you set-up an environment. If you create additional environments, then this Browse field will not display.
10. Type the **User name** and **password** for the OIPA database. The build manager will send this information to you. This is different from the user name and password you will use to log on to the Rules Palette.



11. Type the **User name** and **password** for the IVS database (if the environment uses IVS). The build manager will send this information to you. This is different from the user name and password you will use to log on to the Rules Palette.

**Steps**

1. Assign Environment Alias
2. **Confirm Database Credentials**

**Confirm Database Credentials (2 of 2)**

**Environment : Test**

Type :

Debug Webservice :

**Application Database : Oracle**

Host :

SID:

User ID :

Password :

**IVS Database**

Host :

IVS SID:

Environment Name :  Track :

User ID :

Password :

< Back   Next >   Finish   Cancel   Help

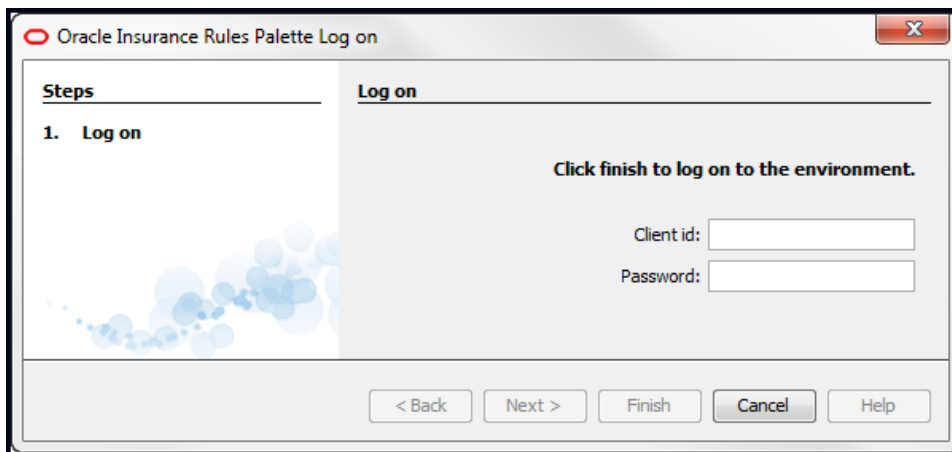
Step 2 of the Environment Creation Wizard

12. Click **Test Connection** to test your connection. After both database connections are successful, click **Finish**.

## LOG ON THE RULES PALETTE

### Steps to Log on the Rules Palette

1. Right-click on the new environment node you created and select **Log on**.
2. Type your Rules Palette user name in the **Client ID** field.
3. Type your password in the **Password** field.
4. Click **Finish**.



Log on Window

After you log on, the Rules Palette will begin loading business rules. The bottom right corner of the application window will show the progress. If the rules have not finished loading completely, then you may not be able to open some of the folders in the Explorer tabs. Wait until the loading progress bar disappears before trying to open any folders.

---

**Note:** Refer to the Rules Palette help system to learn how to use the Rules Palette application. The help system can be accessed from inside the Rules Palette application. Click **Help** on the Main Menu bar.

---