ORACLE
INSURANCE

Oracle Insurance

Data Capture Installation Guide

WebLogic

Release 5.2

October 2014

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Oracle Insurance Data Capture Installation Guide

Release 5.2

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PREFACE

Welcome to the *Oracle Insurance Data Capture Installation Guide, WebLogic*. Oracle Insurance Data Capture (OIDC) is a Web-based software application that streamlines data captured by insurers by allowing insurers to create and configure questions and rules through an intelligent front-end data capture web application.

This guide is for new installations and lists requirements and instructions for installing OIDC and associated databases utilizing Oracle WebLogic Application Server (WebLogic). If you have questions or experience an issue with the installation, please contact My Oracle Support for assistance.

Audience

This guide is intended for system administrators, installers, database administrators and others tasked with installing and configuring the Oracle Insurance Data Capture (OIDC) system and associated databases.

Oracle Software Delivery Cloud

Prior to installation, please make sure the source machine(s) where Oracle Insurance Data Capture 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 Oracle Insurance Data Capture 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 My Oracle Support.

Related Documents

For more information, refer to the following Oracle resources:

- The Oracle Insurance web site:

  http://www.oracle.com/industries/insurance/index.html

- If you need assistance with an Oracle Insurance Data Capture, please log a Service Request using My Oracle Support at:

  https://support.oracle.com/

CHECKLIST OF REQUIREMENTS AND PROCEDURES

The following checklist can be used to help in a **NEW** installation of OIDC utilizing WebLogic.

- ❑ **Oracle database requirements**
  - ❑ Proper Network Connection to Database Server
  - ❑ Oracle Database 12c Release 2 (12.1.0.2). The suggested Table Space storage requirement is 1 Gig
- ❑ **SQL Server database requirements**
  - ❑ Proper Network Connection to Database Server
  - ❑ MS SQL Server 2012 (11.0.2100.60) or MS SQL Server Express 2012 with Microsoft SQL Server Management Studio
- ❑ **Worksite requirements**
  - ❑ WebLogic 12c release 12.1.2.0.0 non-root user
  - ❑ Fusion Middleware 12c (12.1.2)
  - ❑ ADF 12c (12.1.2)
  - ❑ JSF 2.0 (Coincides with 1.2)
  - ❑ Java Runtime 1.7
- ❑ **Palette requirements**
  - ❑ Microsoft Windows Server 2012 R2 64-bit
  - ❑ MSXML 4 or above
  - ❑ Microsoft IIS 7.0 or 7.5
  - ❑ Microsoft .NET Framework version 4.0
- ❑ **IBSS for WebLogic Release 4.7.2 installed.** WORKSITE ONLY

Installation Procedures

❑ **Create Oracle Database Schemas**	**Chapter 2**
❑ **Restore SQL Server Database**	**Chapter 3**
❑ **Deploying Applications to WebLogic**	**Chapter 5**
❑ Create a WebLogic OIDC domain	
❑ Deploy Worksite	
❑ **Configuring WebLogic**	**Chapter 6**
❑ Worksite Groups and Users	
❑ **Install Palette**	**Chapter 9**
❑ Update Application Pool	
❑ Update Virtual Directory	
❑ **Launch URLs**	**Chapter 10**

IBSS

IBSS is required for OIDC. Only the deployment of the IBSS.EAR file is required. Connection to an IBFA instance is not needed or used by OIDC, nor is Subscriber IDs and nodes but these items can be setup if desired.

NOTE: *The IBSS instance must be standalone. Clustered environments cannot be used.*

Setting up and Deploying in WebLogic

WebLogic 12c should be up and running prior to deploying the .EAR file. There are five required steps for setting up IBSS in WebLogic and one optional step.

Step 1: IBSS requires a separate domain from OIDC. This is a required step.

When creating a separate domain, **DO NOT** select the Select Oracle JRF - 11.1.1.0 [oracle_common]. *IBSS does NOT require this product.*

While not required, it is recommended that IBSS be on a port separate from OIDC. To create a dedicated port for Insbridge, select Administration Server and set the port that you want to use. Make note of the port number you choose. The port number will be required for further installation instructions.

Do not start the server.

Step 2: The Configuration Files must be placed in a static location. This is a required step.

Create separate config and instance folders. You can place the folders any where you want. These folders hold the necessary files for the SoftRater for WebLogic installation. Take note of the location and make sure you have created these folders prior to deploying the .EAR files. For example:

- For a Windows environment, C:\Insbridge\config
- For a Linux environment, `home/Insbridge/config`

NOTE: *For the purposes of this guide, the location will be referred to as C:\Insbridge\config.*

An instance folder also must be in place. 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`

NOTE: *For the purposes of this guide, the location will be referred to as C:\Insbridge\config\instance.*

The SoftRater for WebLogic zip file should be downloaded to the WebLogic server prior to configuration. Unzip the file. There will be an XML file and an .EAR file inside.

- **IBSS_WL.ear**
- **Insbridge.net.softraterconfig.xml**

Place these files in the C:\Insbridge\config folder.

NOTE: *It is important that the configuration path specified in the Adding a System Property to WL Server section of this document contain both the application and configuration files. These files need to be placed where you specify in the startWebLogic.cmd file.*

Once you have these files in place, do not move them.

Step 3: A System Property must be added to the WebLogic Server. This is a required step.

1. In a Windows Explorer window, enter the server domain location, i.e. %Domain=Home%.
2. In the "**bin**" folder locate the "**startWebLogic.cmd**" file. Make a backup of the "**startWebLogic.cmd**" file.
3. Open the "**startWebLogic.cmd**" file and right click to **Edit**. Scroll to the JAVA_OPTIONS portion of the file.

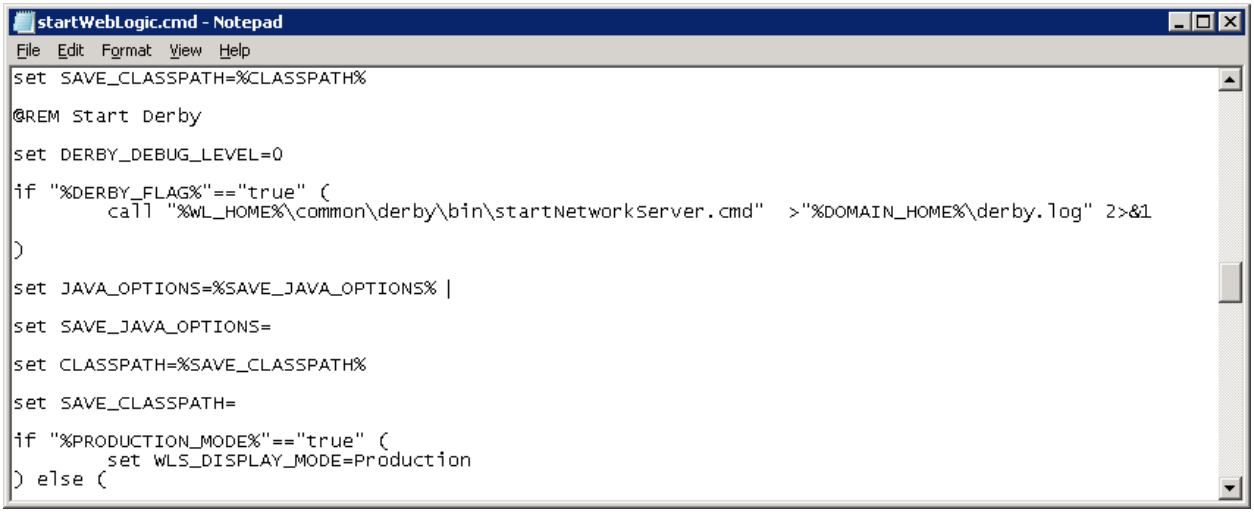


Figure 1 – Editing startWebLogic.cmd File

4. Locate the **set SAVE_JAVA_OPTIONS** instruction that looks similar to the one in Figure 1. Your exact file may have slight variations.
5. Immediately before the "set SAVE_JAVA_OPTIONS" line, insert the following (all on one line):

```
set JAVA_OPTIONS=%JAVA_OPTIONS%
-DINSBRIDGE_APP_DIR="c:\Oracle\Insbridge\config"
-DINSBRIDGE_INSTANCE_APP_DIR="C:\Oracle\Insbridge\config\instance"
```

Please leave a single space between statements. Do not use line breaks.

NOTE: *If WebLogic does not enter running mode, please check the start dialogue. If your system property is not recognized, please verify that valid characters have been entered.*

6. **Save** your changes.

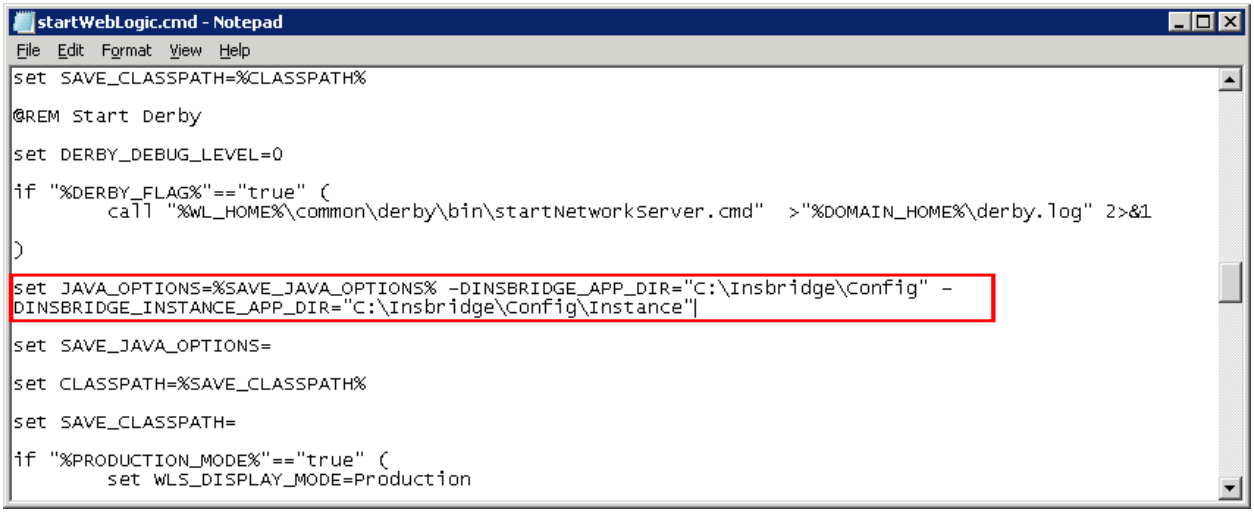


Figure 2 – Edited startWebLogic.cmd File

7. The variables will be added to the Server the next time it is started.

Adding to the WebLogic Server – Linux

The procedure is similar in Linux. Locate the "**startWebLogic.sh**" file. In many instances, the file will be located in: `../Oracle/Middleware/user_projects/domains/insbridge/bin`. Open the file and right click to **Edit**. Scroll to the JAVA_OPTIONS portion of the file and make the necessary changes, for example:

```
-DINSBRIDGE_APP_DIR="/home/INSTALLDIR/Insbridge/Config"

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

NOTE: *If the server domain was running during these modifications, you will need to restart the server before proceeding.*

Step 4: Starting the WebLogic Server. This is a required step.

Start the WebLogic server.

You will need the administrator username and password for the server domain where you want to install SoftRater.

Step 5: Installation of the .EAR File. This is a required step.

1. From the Summary of Deployments Page, click the **Install** button. The screen will refresh to the Install Application Assistant page.
2. The list of Locations will be displayed. Click the location you need to reach the .EAR file.
3. Select the **.EAR** file.

Figure 3 Select the Application .EAR

4. Click **Next**.
5. On the **Install Application Assistant** page, select to **Install this deployment as an application**. Click **Next**.
6. On the **Optional Settings** page, it is recommended that you keep the default values. The deployment name should appear as IBSS.
7. Click **Finish**.
8. After the .EAR File has been added, you will be placed on the Summary of Deployments page. The .EAR File you added will be listed. Read the messages at the top of the screen and correct any error messages.

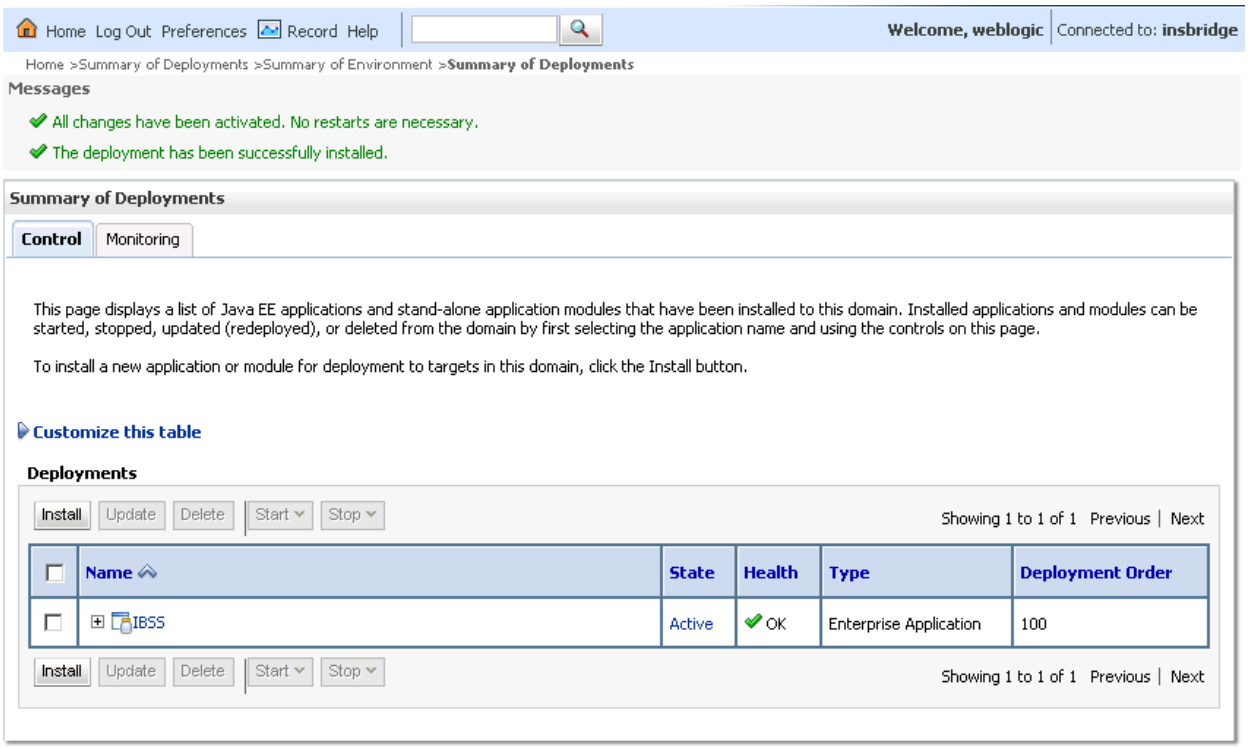


Figure 4 – Successful Installation

Test the application on URL: http://<ServerName>:7001/IBSS.

Where: ServerName is the name of the server where WebLogic resides.

The port can be changed, please verify the port number if the application fails to launch.

NOTE: *Port 7001 is the most commonly used port. The port number may have been changed when the instance was created.*

If the application fails to launch and the port and server name are correct, you may need to stop and start WebLogic.

Step 6: Setting up a SoftLibrary in IBSS. This is an optional step and can be performed at a later time. This is optional.

Please see the IBSS for SoftRater Installation Guide for instructions on a full deployment of IBSS.

OVERVIEW

OIDC on a WebLogic platform is composed of three components that are typically installed on separate machines:

- Worksite utilizing an Oracle 12c database.
- Palette utilizing an MS SQL Server 2012 (11.0.2100.60) database or a SQL Server Express 2012 database.

Deployment Architecture

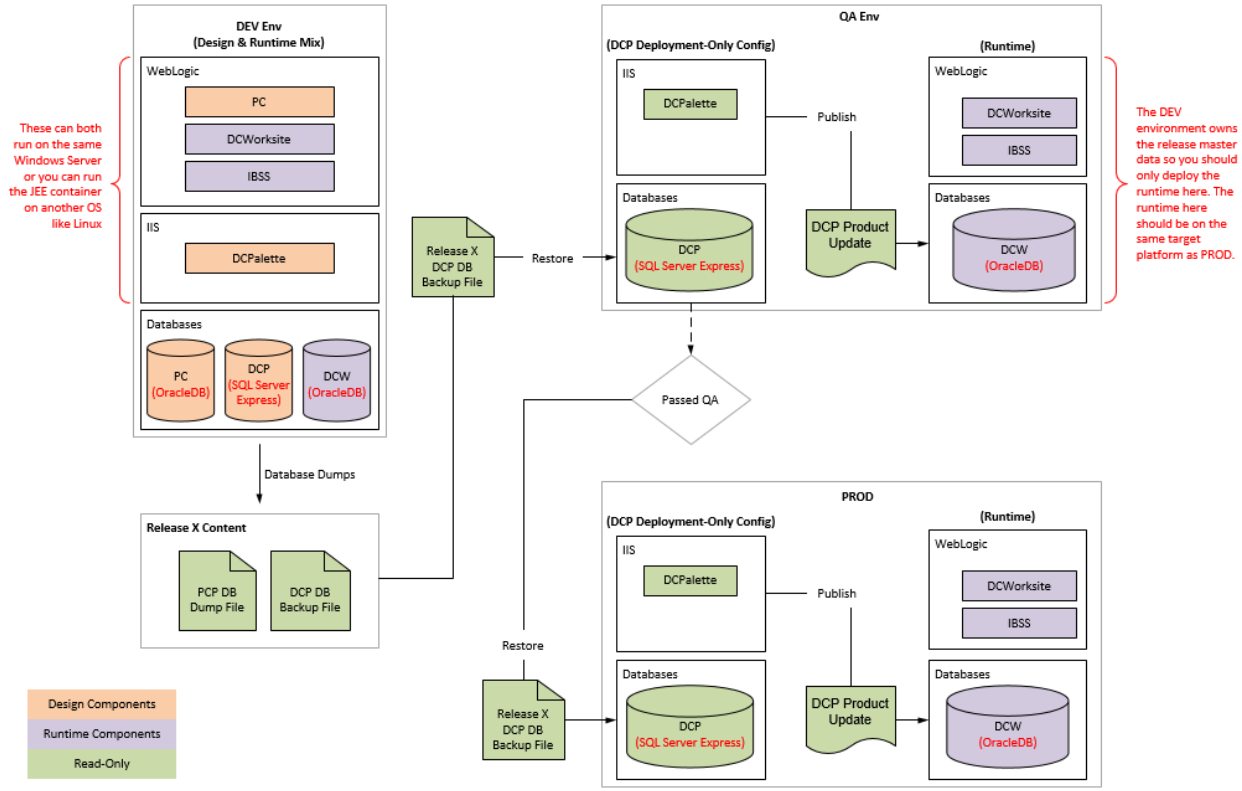


Figure 5 Deployment Architecture

It is recommended that the databases be on separate machines from the applications due to performance and security issues. Palette can be a tenant in a larger machine setup. Palette uses the default IIS port. If this presents a conflict, an alternate port can be assigned. The Worksite database can be a tenant in a larger setup.

DOWNLOAD AND INSTALLATION FILES

The download from the Oracle Software Delivery Cloud consists of:

- 05.02.00-oidc-integration.zip – Contains the DCIntegration folder which holds the OIDC callout and integration examples along with .JAR libraries that can be used to build integration adaptors.
- 05.02.00-oidc-palette.zip – Contains the DCPalette folder which holds the installation files for the OIDC Palette application and the SQL Server database for new installs.
- 05.02.00-oidc-samples.zip – Contains the SampleContent folder which holds PC and Palette pre-filled databases, a .JAR file for pre-built sample integration adaptors, and an XML IBSS registry file for the pre-built adaptors. These are designed to demonstrate OIDC features.
- 05.02.00-oidc-worksite.zip – Contains the DCWorksite folder which holds the WebLogic .EAR file for the OIDC Worksite application and the Oracle database for new installs.

Chapter 2

ORACLE DATABASE SCHEMAS

This guide is for new installations where no OIDC schemas are present.

IMPORTANT: ***It is strongly recommended that any database modification be performed by a qualified database administrator (DBA). The database setup procedures and tasks require the skill set of a database administrator. If you are not a database administrator, please stop. Improper setup may result in unwelcome changes to the database. Please consult with a qualified database administrator before proceeding***.

The database installer should have administrator rights on the machine where the database schemas will be created.

NOTE: *To utilize Sample content, please see* Utilizing Sample Content *on page 16.*

NEW SCHEMA INSTALLATION

Create the databases in accordance with your company's standards. Your entries may differ from the examples given.

Do not run these scripts on an existing database.

Create Schema Owners (Database Users)

A new Worksite installation begins with creating an Oracle database schema.

You will need to create schema owners (database users) for the Worksite schemas.

1. Create the Oracle Database users. For example: DC_52_WORKSITE
2. Grant the necessary privileges and quotas to the new users just created.

Create Worksite Tables

1. Locate the DC_52_WORKSITE_NEW.sql file from the installation download.
2. The script must be run under the schema owner.
3. Log in as the Worksite schema owner.
4. Apply the script to create the database tables.

Chapter 3

THE SQL SERVER DATABASE

This guide is for new installations where there is no OIDC database present.

IMPORTANT: ***It is strongly recommended that any database modification be performed by a qualified database administrator (DBA). The database setup procedures and tasks require the skill set of a database administrator. If you are not a database administrator, please stop. Improper setup may result in unwelcome changes to the database. Please consult with a qualified database administrator before proceeding***.

The database installer should have administrator rights on the machine where the database will be restored. Microsoft SQL Server Management Studio must be installed.

NOTE: *To utilize Sample content, please see Utilizing Sample Content on page 16.*

NEW INSTALLATION

Create the database in accordance with your company's standards. Your entries may differ from the examples given.

Create Palette Database

1. From the installation download, select Palette→Database→SQLServerDB→NewInstall.
2. Locate the DC_52_PALETTE_NEW.bak file.
3. Park the file in a location where the MS SQL Server has access. Typically it should be on the same machine where the MS SQL Server instance resides.
4. Use the Microsoft SQL Server Management Studio to restore the backup file. It is strongly suggested that the database name be changed to something that defines the database more accurately in your environment.

Take Note:

The Palette Installation allows you to enter the database connection information. Make note of:

1. The database server name or IP address
2. The database name
3. User name
4. Password

Chapter 4

UTILIZING SAMPLE CONTENT

Sample Content is a separate set of database backups and integration adaptors consisting of a PC .dmp file, a Palette SQL .bak file, and a .jar file containing the activity adaptors. The sample content is not suitable for re-use in the 'real world', but demonstrates - and provides examples of - the features of Data Capture.

A Sample Content file for the Worksite is not included. The contents of Worksite are populated by publishing from the Palette.

Prior to restoring sample content, you will need to know the new and old schema owner names.

Loading the Sample Content Oracle Database for Product Configuration

1. From the installation download, select the SampleContent folder. Locate the PC_10_SAMPLE.dmp file.
2. Locate the PC Sample Import Instructions.txt file for detailed instructions.

Loading the Sample Content MSSQL Database for Palette

Prerequisite: The production configuration sample content must be used.

1. From the installation download, select the SampleContent folder. Locate the DC_52_PALETTE_SAMPLE.bak file.
2. Park the .bak file in a location where the MS SQL Server has access. Typically it should be on the same machine where the MS SQL Server instance resides.
3. Restore the backup file. It is strongly suggested that the database name be changed to something that defines the database more accurately in your environment.

Deploying the Sample Content Activity Adaptors

1. IBSS should be deployed prior to loading the sample adaptors. Please see Setting up and Deploying in WebLogic or the SoftRater for WebLogic Installation Guide for instructions on deploying the IBSS.EAR file.
2. From the installation download, open the SampleContent directory.
3. Locate and copy the ActivitiesImpl-SampleContent.jar file to the WebLogic library: [MW_HOME]\user_projects\domains\[YOUR_DOMAIN]\lib.

   For more information, please see the Insbridge IBSS User Guide. Please see http://www.oracle.com/technetwork/documentation/insurance-097481.html#Insbridge for documentation.
4. From the OIDC installation download, locate the JAR files, ActivityServiceSDK.jar, IBSoftService.jar, and libIntgUtil.jar, in DCIntegration\IBSS_472_compatible\oidc-integration-

shared.zip. Extract and copy to the WebLogic library [MW_HOME]\user_projects\domains\[YOUR_DOMAIN]\lib folder as well.

Where [MW_HOME] is the relative path to the app server installation location

5. The SampleContent oidc-sample-lib-regs.xml requires arguments to be configured. Open oidc-sample-lib-regs.xml in Notepad and copy the contents to the Windows clipboard.
6. Navigate to the Insbridge application directory where contents of the IBSS installation have been placed.
7. Open insbridge.net.softraterconfig.xml using Wordpad (it correctly interprets UNIX-style line breaks, so the contents will be easier to read) and paste the contents of the clipboard between the start and end <lib_ref> tags. Save the file and close.

```
- <lib_ref>
  - <lib n="PolicySubmitMockImpl" cls="com.oracle.igbu.activity.SubmitPolicyMockImpl" l=""
    d="2012-07-30 02:23:34 AM" s="a" t="2" />
  - <lib n="LOVTestSoftData" cls="com.oracle.igbu.activity.ListOfValuesSampleXmlImpl" l=""
    d="2013-04-19 07:57:37 AM" s="a" t="2" />
  <lib_ref>
```

Figure 6 Sample

8. Restart the WebLogic server on which your IBSS runs.

Testing with Supplemental Data

Included in the Sample Content folder is a Sample Content – Supplemental Data Callout Records_v1.0.1.xlsx file. The Sample Content excel file contains a list of valid insured first name, last names and DOB required to get a valid response from supplemental data callout and can be used to verify the calculations in the sample questionnaire two.

Chapter 5

WORKSITE REQUIREMENTS

The following configuration assumes that the administrator of the server is generally familiar with managing WebLogic and the server where WebLogic resides. Worksite requires:

- ADF Runtime 12c (12.1.2)
- An OIDC domain in WebLogic
- An Oracle 12c database – schema name, location and password, for Worksite
- In a Windows environment, you will need 7-zip or win-zip to extract the .EAR files.

Worksite requires an OIDC domain in WebLogic. WebLogic should not be installed as root. Root will not allow for access to the ADF Runtime required by OIDC. If WebLogic has been installed as root, you will need to allow for ADF Runtime access or you can uninstall WebLogic and then reinstall as a non-root user, for example as the OIDC installer.

ADF Requirements

Prior to creating any domains, verify that ADF Runtime 12c is installed. If you need to run ADF Runtime, please have this information ready prior to installing.

NOTE: *If the WebLogic Server option is not available during the ADF install, check that you have a compatible version of WebLogic installed. You may need to upgrade your WebLogic.*

High Level ADF Instructions

1. Verify a complete WebLogic 12c install.
2. Install the 12.1.2 Oracle Fusion Middleware. The Oracle installation guide for installing the 12.1.2. Oracle Fusion Middleware is available at:
3. http://docs.oracle.com/middleware/1212/core/INFIN/install_gui.htm

ADF Runtime Download Location

ADF Runtime needs to be installed prior to creating any domain. You can download ADF Runtime from: http://www.oracle.com/technetwork/developer-tools/adf/downloads/index.html.

The Oracle installation guide for installing the 12.1.2 Application Developer Runtime can be found at: http://docs.oracle.com/middleware/1212/core/INFIN/index.html

My Oracle Account

The ADF installer may require that an update be run during the install. If you would like to run any updates, please have your *My Oracle* account information ready. You can get an account at:

https://support.oracle.com/CSP/ui/flash.html

A Location for JRE/JDK

The installer requires the full path to the location of a Java Runtime Environment (JRE) on your system. If you do not use this location during the ADF install you may have to specify the JRE/JDK location for WebLogic, for example:

```
C:\Oracle\Middleware\jrockit_160_29_D1.2.0-10\jre
or
/root/jrockit-jdk1.6.0_24_D1.1.2-4.0.1/jre
```

Verifying JSF Libraries in WebLogic

Prior to installing any application .EAR file, please verify that there are two JSF libraries in WebLogic.

On the deployment page, scroll down to find:

- jsf(1.2,1.2.9.0)
- jsf(2.1,2.1.7-01-)

Name	State	Health	Type	Targets	Deployment Order
adf.oracle.businesseditor(1.0,12.1.2.0.0)	Active		Library	AdminServer	100
adf.oracle.domain(1.0,12.1.2.0.0)	Active		Library	AdminServer	100
adf.oracle.domain.webapp(1.0,12.1.2.0.0)	Active		Library	AdminServer	100
coherence-transaction-rar	Active	OK	Resource Adapter	AdminServer	100
DCW_WLS	Active	OK	Enterprise Application	AdminServer	100
DMS Application (11.1.1.1.0)	Active	OK	Web Application	AdminServer	5
jsf(1.2,1.2.9.0)	Active		Library	AdminServer	100
jsf(2.1,2.1.7-01-)	Active		Library	AdminServer	100
jstl(1.2,1.2.0.1)	Active		Library	AdminServer	100
odl.clickhistory(1.0,12.1.2)	Active		Library	AdminServer	100

Figure 7 JSF Verification

jsf(1.2,1.2.9.0) can be found at:

WINDOWS: Oracle\Middleware\wlserver_12.1\common\deployable-libraries\jsf-1.2.war

or

LINUX: /Oracle/Middleware/wlserver_12.1/common/deployable-libraries/jsf-1.2.war

jsf(2.1,2.1.7-01-) can be found at:

WINDOWS: Oracle\Middleware\oracle_common\modules\oracle.jsf_2.0\jsf-ri-20.war

or

LINUX: /Oracle/Middleware/oracle_common/modules/oracle.jsf_2.0/jsf-ri-20.war

If a library is missing, please deploy as a library before deploying any application .EAR files.

A missing library may result in errors when deploying the Worksite .EAR files.

Chapter 6

CONFIGURING WEBLOGIC

After setting the ADF environment need to modify WebLogic startup file to set app directory path.

WEBLOGIC STARTUP OPTIONS

The startup script needs to have two commands added; one to set the location where the oidc_config.xml file will be created and maintained and one for the proper functioning of callout adapters.

1. Locate the startup script for the OIDC domain on the server where WebLogic is installed:

   This script can be found at:

   [%MW_HOME%]\user_projects\domains\[%DC_DOMAIN]\bin\,

   Where: %MW_HOME% is the Fusion Middleware home where WebLogic is installed

   And: %DC_DOMAIN% is the name of the domain where OIDC is deployed.

   For example:

   C:\Oracle\Middleware\user_projects\domains**[OIDC_DOMAIN]**\bin\startWebLogic.cmd

   Or

   Oracle/Middleware/user_projects/domains/**[OIDC_DOMAIN]/**bin/startWeblogic.sh

   Where: [OIDC_DOMAIN] is the name used for the OIDC Domain

2. Make a copy of the script and give it a name of your choosing.

NOTE: *Startup scripts are generated by the WebLogic configuration wizard and changes will be overwritten if you later extend the domain, so make modifications to the renamed new copy.*

3. To edit the script, open the start file in a text editor.

4. Near the end of the script, find the server startup commands. Right before these calls, add the following Java properties to %JAVA_OPTIONS%:

   set JAVA_OPTIONS=%JAVA_OPTIONS% **-Doracle.insurance.dc.appDirectory="** *C:\Oracle\Insurance\DC\DCW***"**

   set JAVA_OPTIONS=%JAVA_OPTIONS% **-Dweblogic.wsee.workarea.skipWorkAreaHeader=true**

   Where: *C:\Oracle\Insurance\DC\DCW* is the location where Worksite has been installed.

```
echo *  server administration, use the WebLogic Server *

echo *  console at http:\\hostname:port\console       *

echo ***************************************************

@REM CLASS CACHING

if "%CLASS_CACHE%"=="true" (
    CALL :classCaching
)

@REM START WEBLOGIC

echo starting weblogic with Java version:

%JAVA_HOME%\bin\java %JAVA_VM% -version

@REM Set the OIDC application directory
set JAVA_OPTIONS=%JAVA_OPTIONS% -Doracle.insurance.dc.appDirectory=C:\Oracle\Insurance\DC\DCW
@REM Set the PCP application directory
set JAVA_OPTIONS=%JAVA_OPTIONS% -Doracle.insurance.pc.appDirectory=C:\Oracle\Insurance\DC\PC

@REM Disable WorkArea header transmission
set JAVA_OPTIONS=%JAVA_OPTIONS% -Dweblogic.wsee.workarea.skipWorkAreaHeader=true

if "%WLS_REDIRECT_LOG%"=="" (
    echo Starting WLS with line:
    echo %JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% -Dweblogic.Name=%SERVER_NAME% -Djava.security.policy=%WLS_POLICY_FILE% (
    %JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% -Dweblogic.Name=%SERVER_NAME% -Djava.security.policy=%WLS_POLICY_FILE% %JAVA_
) else (
    echo Redirecting output from WLS window to %WLS_REDIRECT_LOG%
    %JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% -Dweblogic.Name=%SERVER_NAME% -Djava.security.policy=%WLS_POLICY_FILE% %JAVA_
```

Figure 8 Updating the startWebLogic Script

5. When you are finished with your edits, save the file.

If you are running OIDC on a managed server, you would make similar modifications to startManagedWeblogic.cmd (or startManagedWeblogic.sh), again making your own copy of the provided script.

You could set both properties together on one line, or add them individually to the startup instructions, or set them in setDomainEnv.cmd (or setDomainEnv.sh, for Linux), which is called by setWebLogic.cmd (or startWebLogic.sh). It doesn't matter where, as long as these settings are passed at startup.

CONFIGURING DATA SOURCE IN WEBLOGIC APP SERVER

1. Log in to WebLogic Console and select Services-> Data Sources in Domain Structure panel. Click New and select the Generic Data Source option.

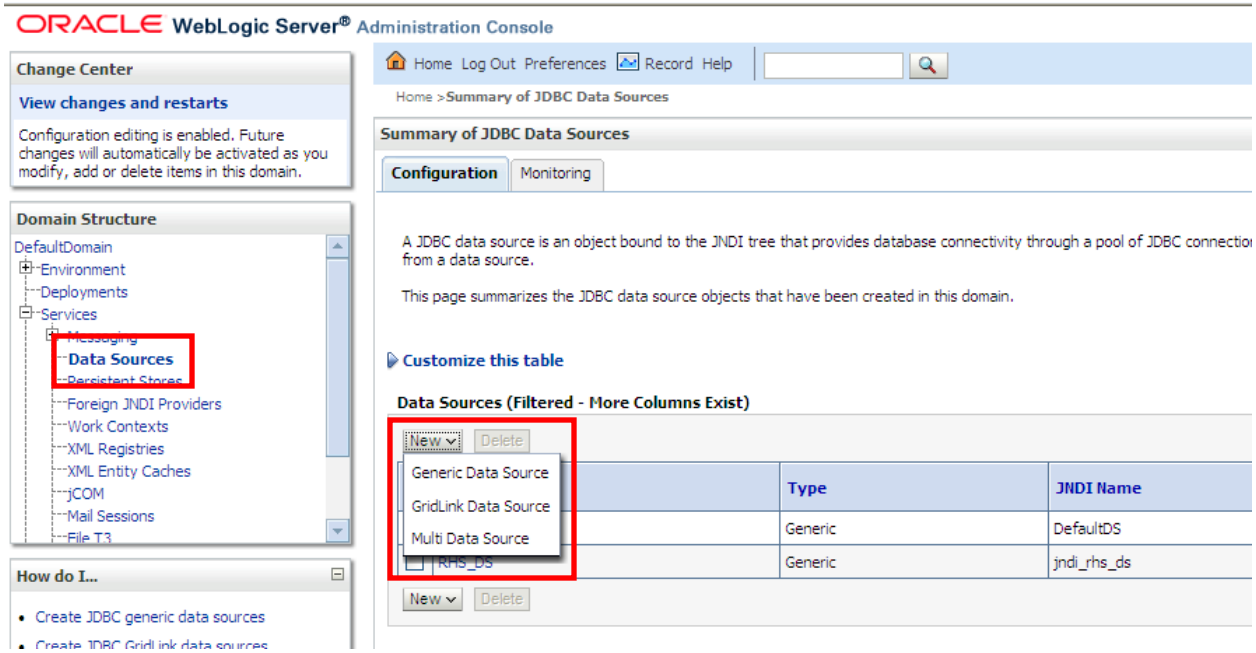


Figure 9 Selecting Data Sources

2. Enter the data source name and JNDI Name:
    a. Data Source Name: OIDC_DS
    b. JNDI Name: jdbc/OidcConnDS
3. Click Next.

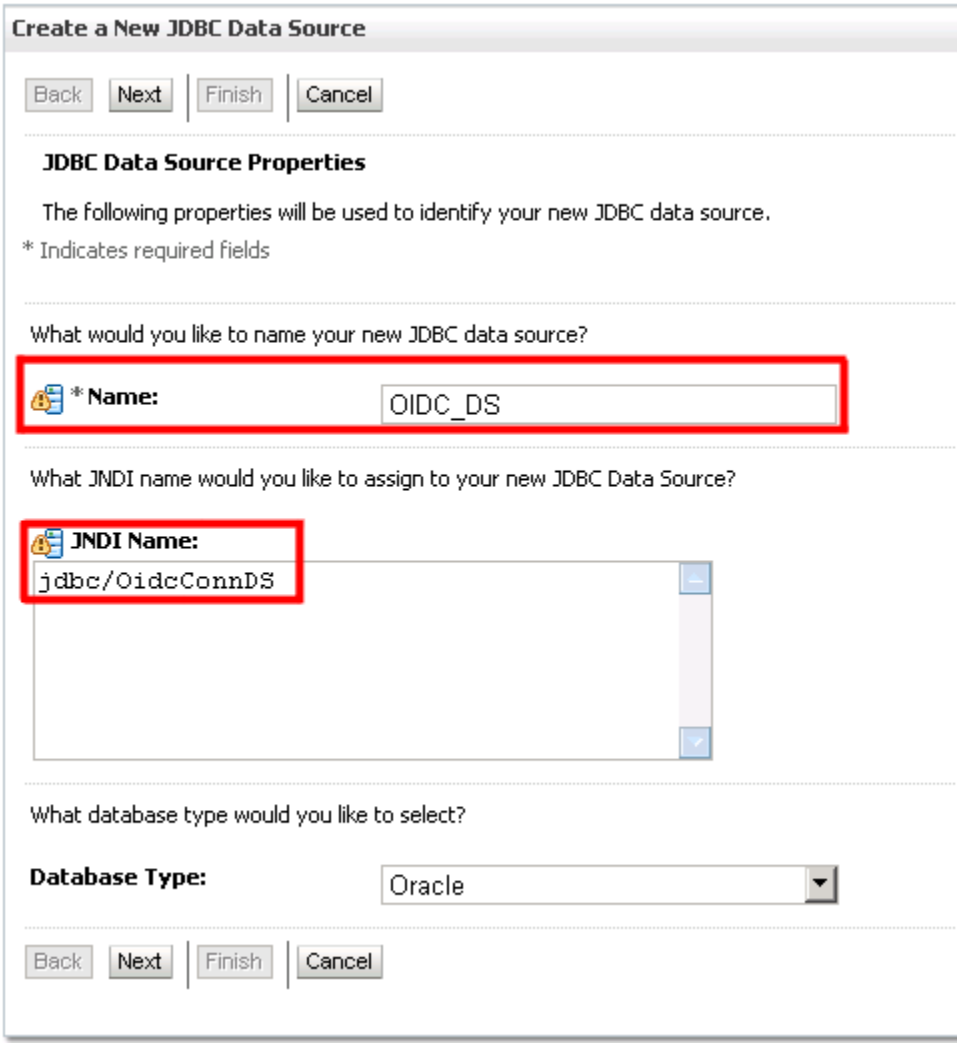


Figure 10 Creating a New JDBC Data Source

The data source name can be any name you choose.

The JNDI name in the WebLogic data source must match the setting in the 'non-jta-data-source' section of the persistence.xml. Uniform naming reduces errors because the same name must be defined in multiple places in Worksite and allows for multiple instances to be installed on the same server.

Please only use this JNDI Name:

- jdbc/OidcConnDS – for Worksite

4. Select the appropriate JDBC Driver from the options available.

5. Click Next.

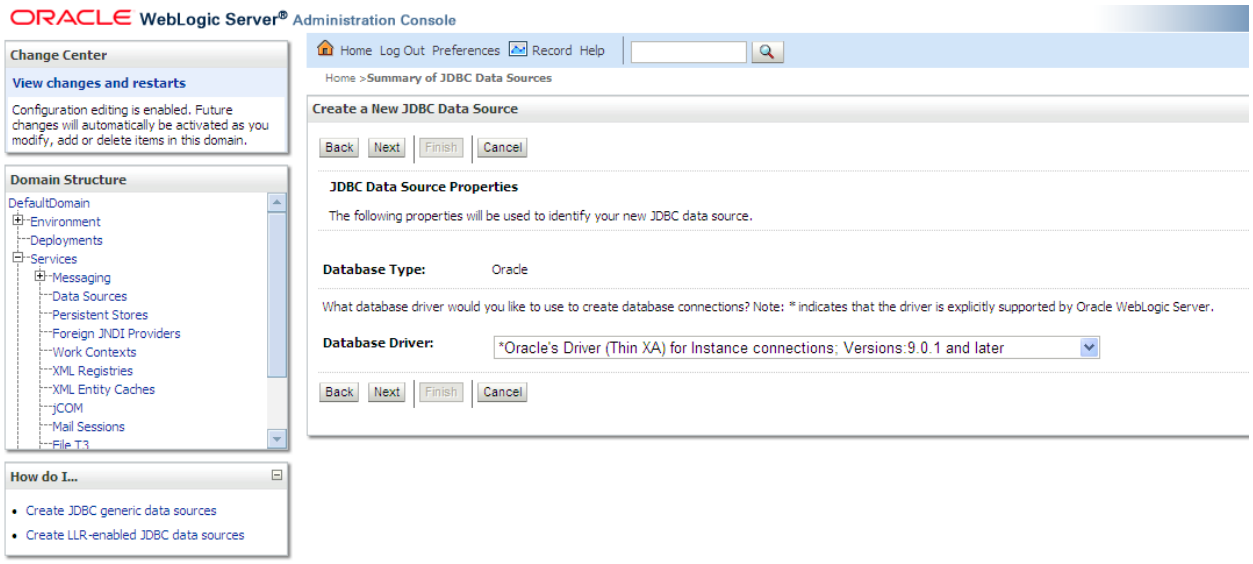


Figure 11 Selecting the JDBC Driver

6. No changes are needed on the next screen. Click Next.

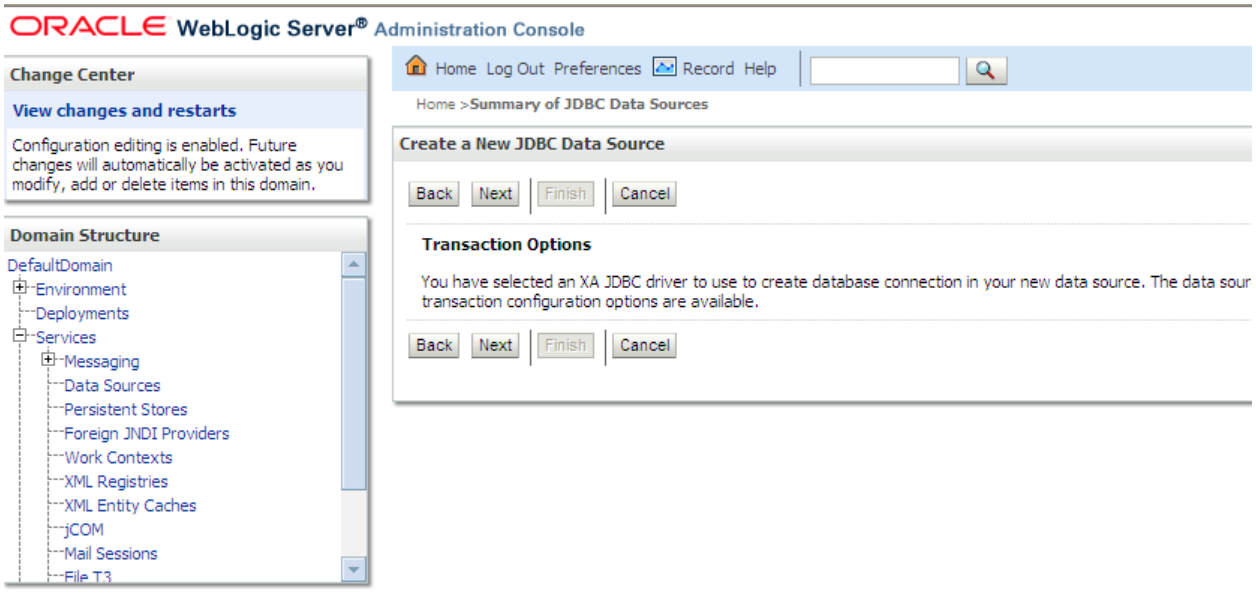


Figure 12 Creating a New JDBC Data Source

7. Enter the Database details. You will need the database name, server name, port, database user and password.

8. Click Next.

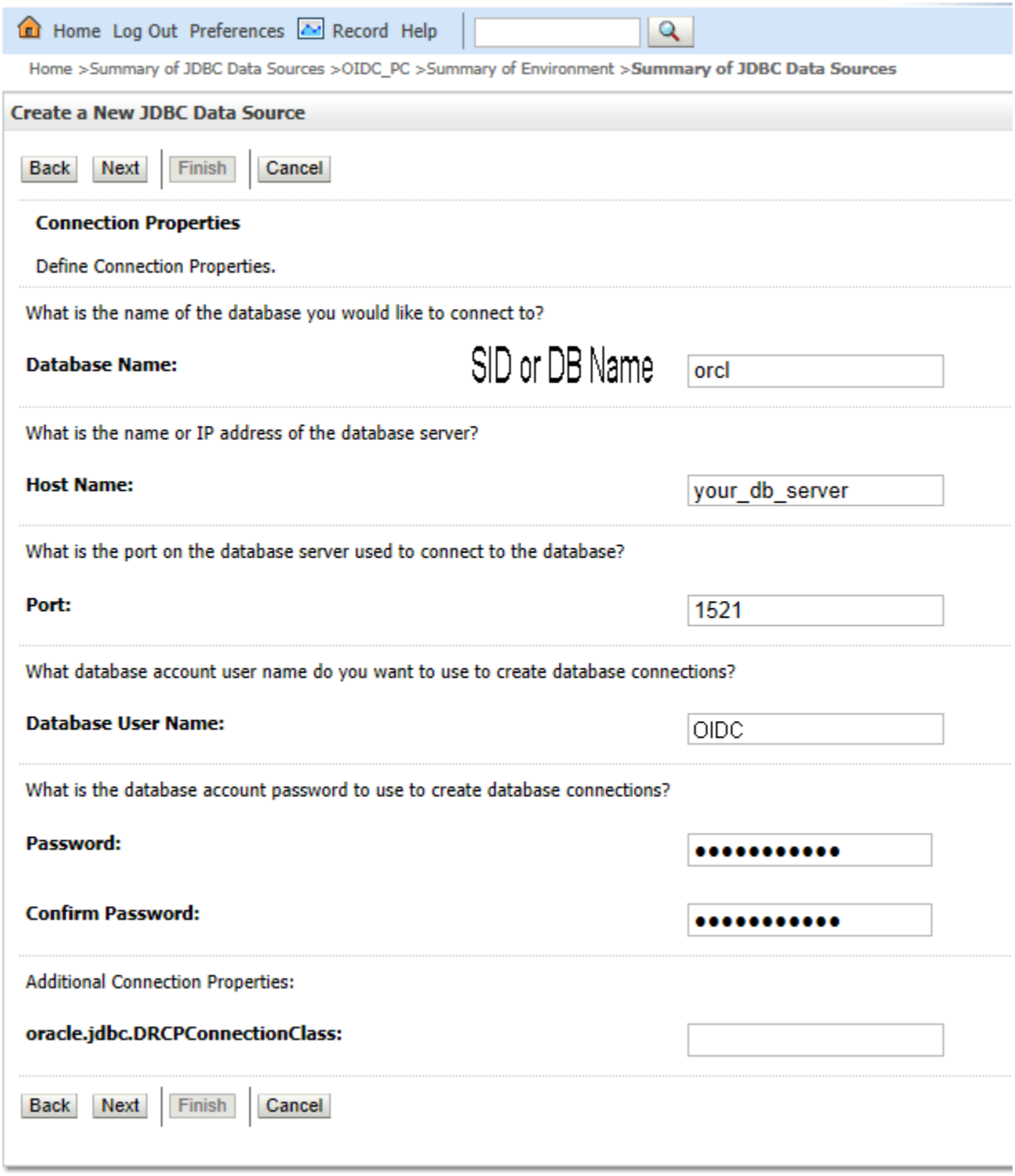


Figure 13 Entering Database Details

9. Click on Test Configuration to validate the Database details. A successful connection displays a “success” message. If a fail message is displayed, please verify your entry and try again.

10. Click Next.

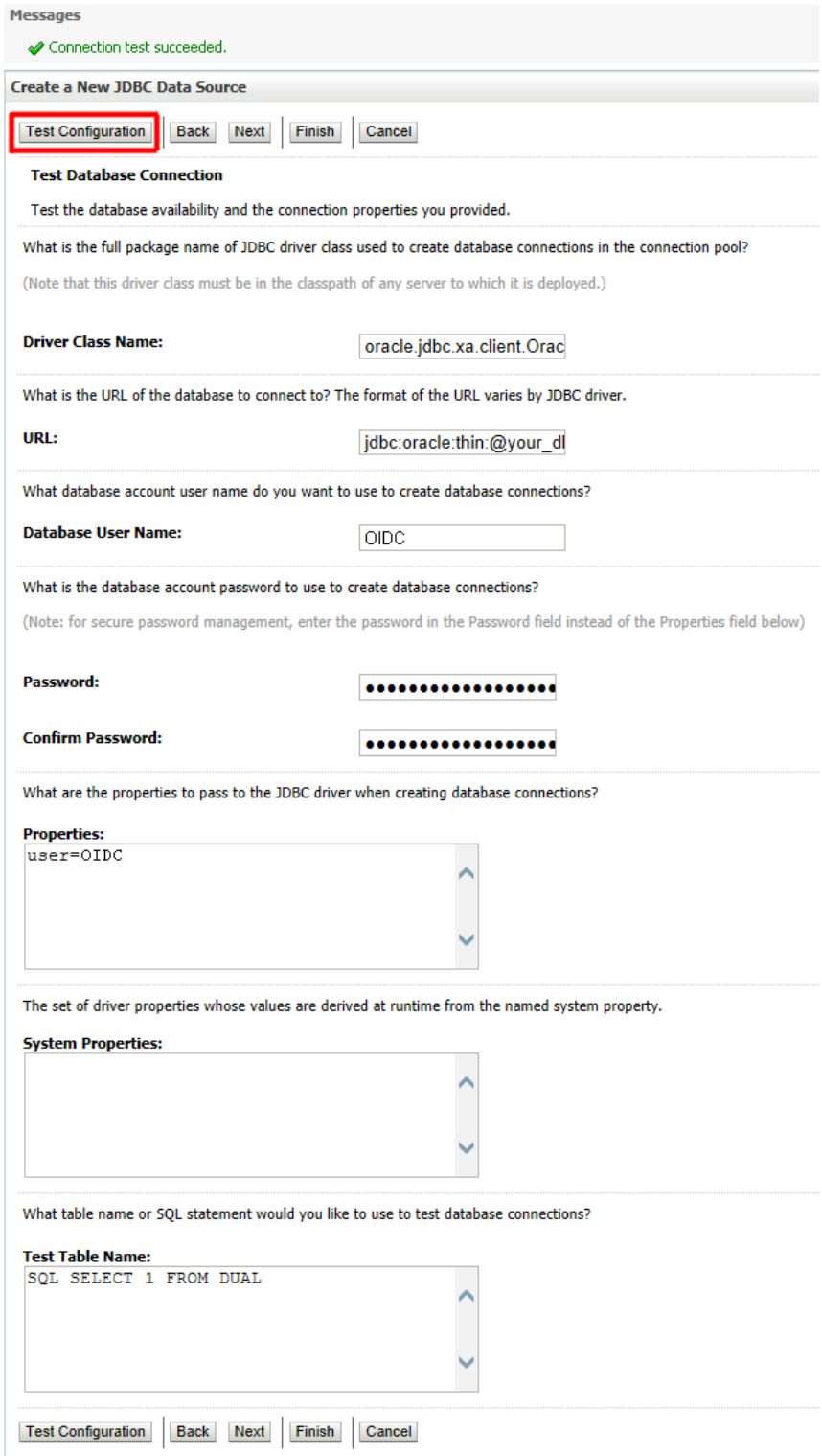


Figure 14 Testing Configuration

11. Select the target server and click Finish. A successful creation displays a “success” message. If there are any errors, please correct and try again.

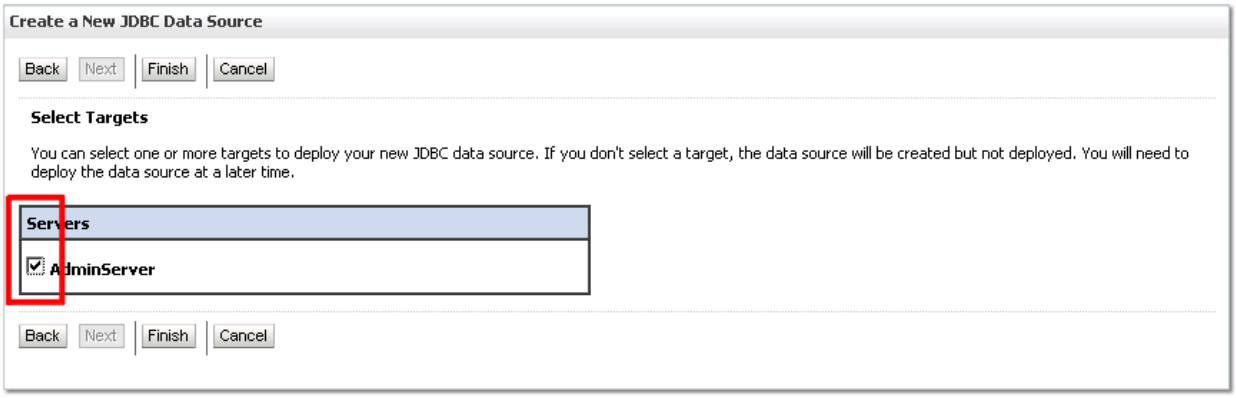


Figure 15 Selecting the Target Server

SECURITY SETTINGS

OIDC implements security by Users and Groups. It has a predefined security group hierarchy for each of the applications. The “BASE” security group will have “ROLES” and “TEAMS” as its sub-groups. The “TEAMS” security group represents a business organization that users belong who would be expected to be able to see and share data that its members have created in OIDC. Any team created for OIDC must be a part of its “TEAMS” group. The “ROLES” security group represents the supported application roles. Currently we have only one security group under “ROLES” as we support only one role. A user must belong to a TEAM and must have at least one role.

Worksite: The Security Groups, Teams and Roles for DCWorskite are described as under.

- **DCBASE**_ This is a security group that serves as the root level for all other groups.
- **DCROLES**_ This is a security group that will hold the available roles. DCROLES_ is a member of DCBASE_.
- **DCTEAMS**_ This is a security group that will serve as the root for all your OIDC user teams. DCTEAMS_ is a member of DCBASE_.
- **DCDataAdministrators**_ This is a security group for Data Capture Administrators. DCDataAdministrators_ is a member of DCROLES_. If a user requires admin role, the user must be a member of this role. The admin user also has view, create, edit and delete rights.
- **MyDCTeam -** This represents a team in your organization. This team can be any name you choose. You can create additional teams and team hierarchies if you wish. This team will be a member of DCTEAMS_.

The security hierarchy can be created either in WebLogic server or in LDAP server.

CREATING USERS AND GROUPS IN WEBLOGIC

Creating a Group in WebLogic Console

1. Log in to the WebLogic Admin Console and click on Security Realms.

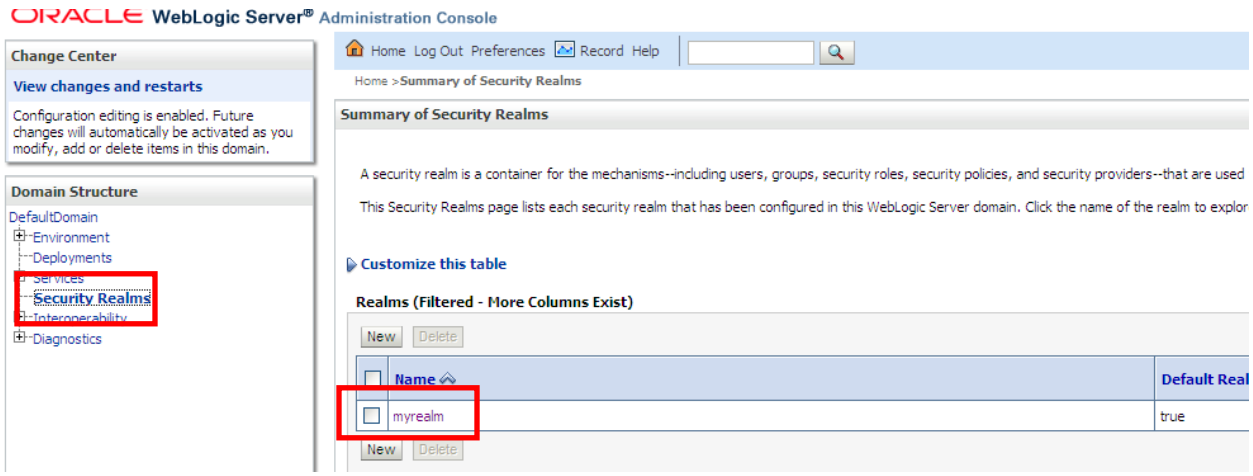


Figure 16 Security Realms in WebLogic

2. Click myrealm.
3. Click Users and Groups.
4. Select Groups.
5. Click New to create a new Group.

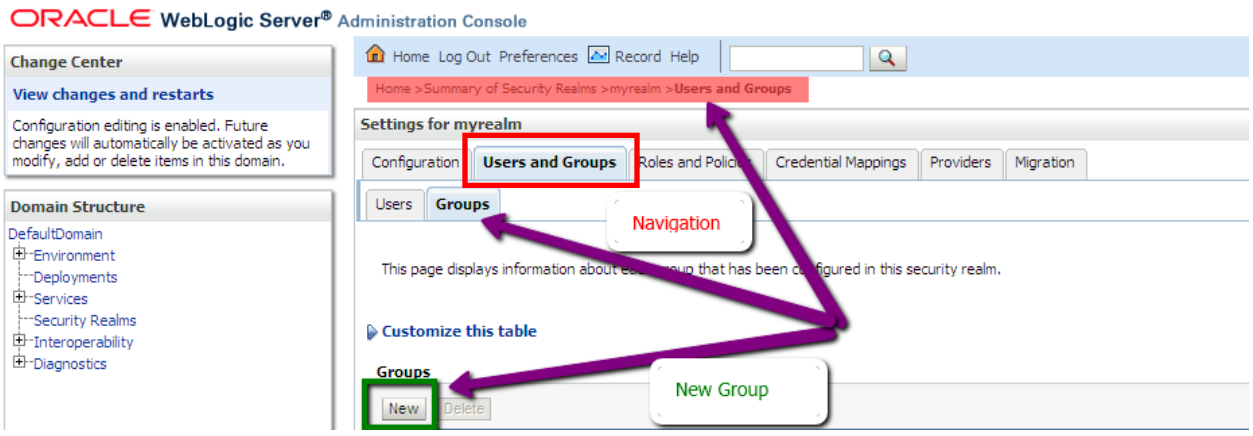


Figure 17 Creating Groups in WebLogic

6. There are 5 groups that need to be created. For each group, enter the Name and Description of the new group and click OK. The description can be the same as the name.
   - **DCBASE_**
   - **DCROLES_**
   - **DCTEAMS_**
   - **DCDataAdministrators_**
   - **MyDCTeam**

NOTE: *Do not change the provider.*

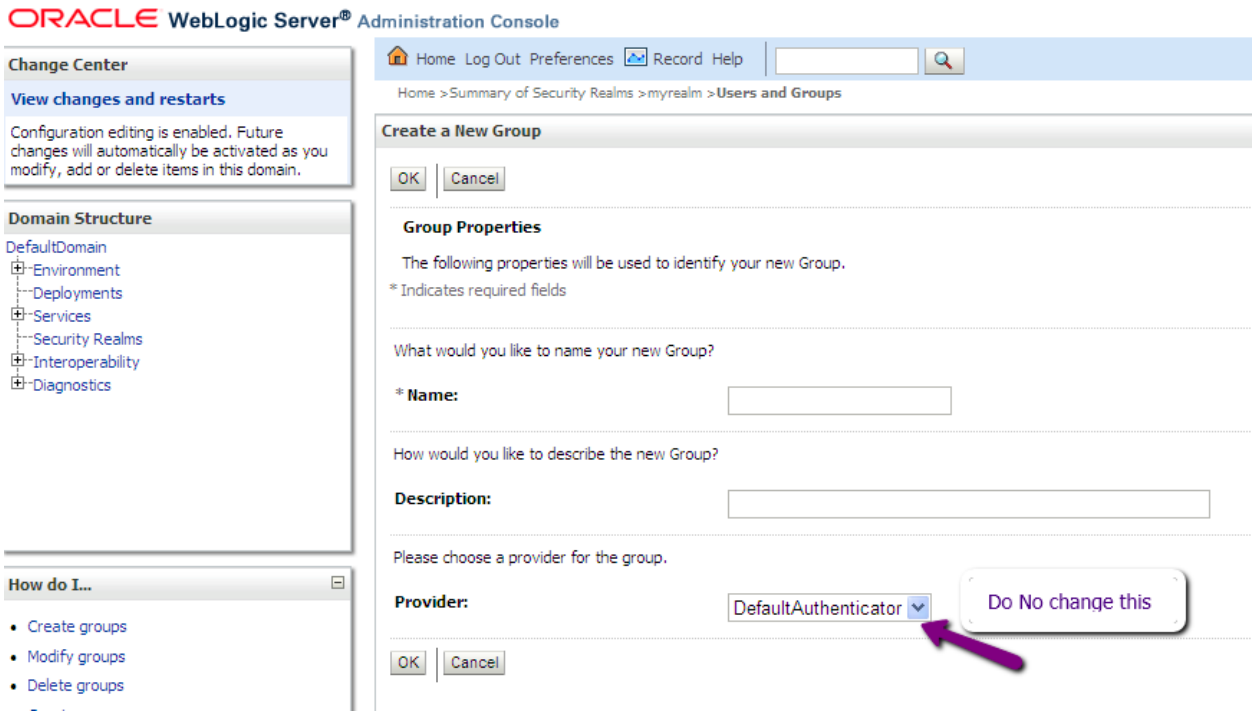


Figure 18 Entering Group Information in WebLogic

Groups, Teams, and Roles

Groups, teams, and roles are all created the same way. The relationship between them is defined in the membership tab. The relationship structure is:

Groups
    Teams
    Roles

- **DCBASE_** This is a security group that serves as the root level for all other groups.
- **DCROLES_** This is a security group that will hold the supported security groups each of which representing a role. DCROLES_ is a member of DCBASE_.

- **DCTEAMS_** This is a security group that will serve as the root for all your OIDC user teams. DCTEAMS_ is a member of DCBASE_.
- **DCDataAdministrators_** This is a security group for Data Capture Administrators. DCDataAdministrators is a member of DCROLES_. If a user requires admin role, the user must be a member of this group. The admin user also has view, create, edit and delete rights.
- **MyDCTeam -** This represents a team in your organization. This team can be any name you choose. You can create additional teams and team hierarchies if you wish. This team will be a member of DCTEAMS_.

7. Verify all the Groups have been created.

8. Click on the **DCBASE_** group and select the Membership tab.

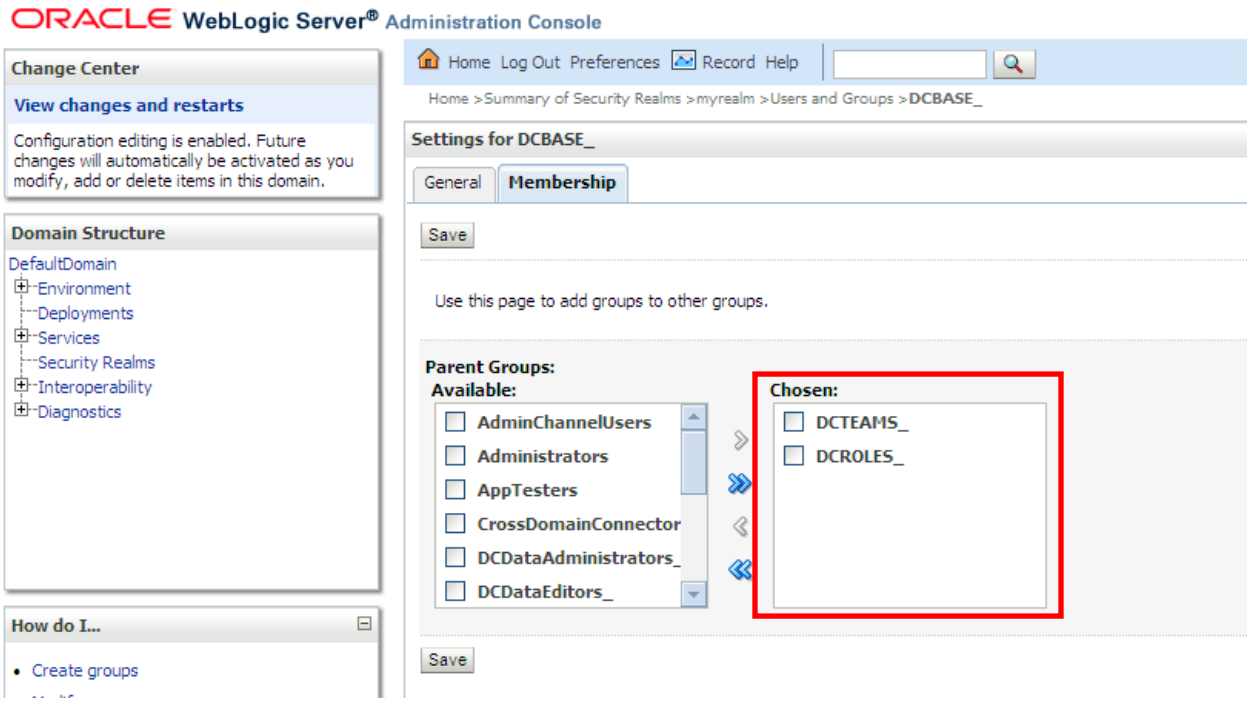


Figure 19 Selecting Membership for DCBase

9. Select DCTEAMS_ and DCROLES_ from the Parent Groups Available, located on the left and move to Chosen, on the right. This makes the DCTeams_ and DCRoles_ groups members of the DCBase_ group.

10. Click Save.

11. Return to the Users and Groups page (you can navigate using the locater links at the top of the screen). Select the DCROLES_ group and select the Membership tab.

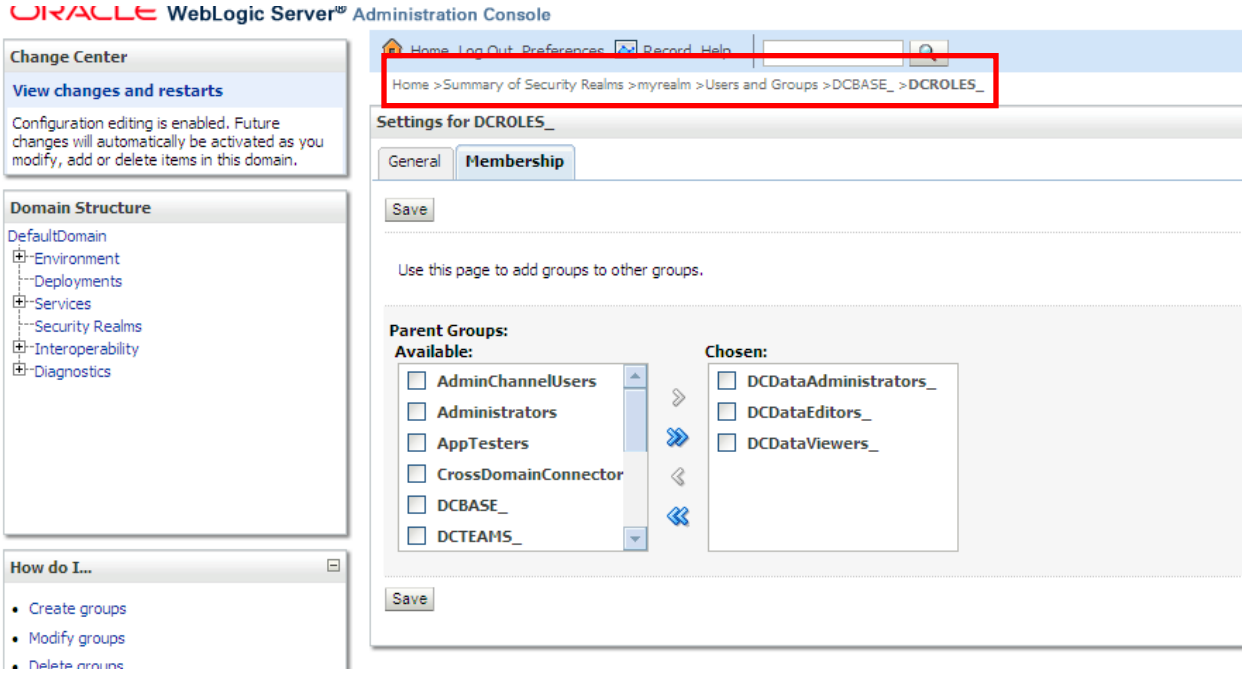


Figure 20 Selecting Members for the DCRoles Group

12. Move DCDataAdministrators_from Parent groups Available to Chosen. This makes the DCDataAdministrators_ group a member of the DCROLES_ group.

13. Click Save.

14. Return to the Users and Groups page (you can navigate using the locater links at the top of the screen). Select the DCTeams team and select the Membership tab.

15. Move MyDCTeam team from Available to Chosen. This makes MyDCTeam a member of the DCTEAMS_ group.

16. Click Save.

NOTE: *Any new Team created should be added to DCTEAMS_ to interact with DC Worksite.*

Creating Users in the WebLogic Console

Users must be a member of a team and have a role assigned.

17. Return to Users and Groups and click on the Users tab.

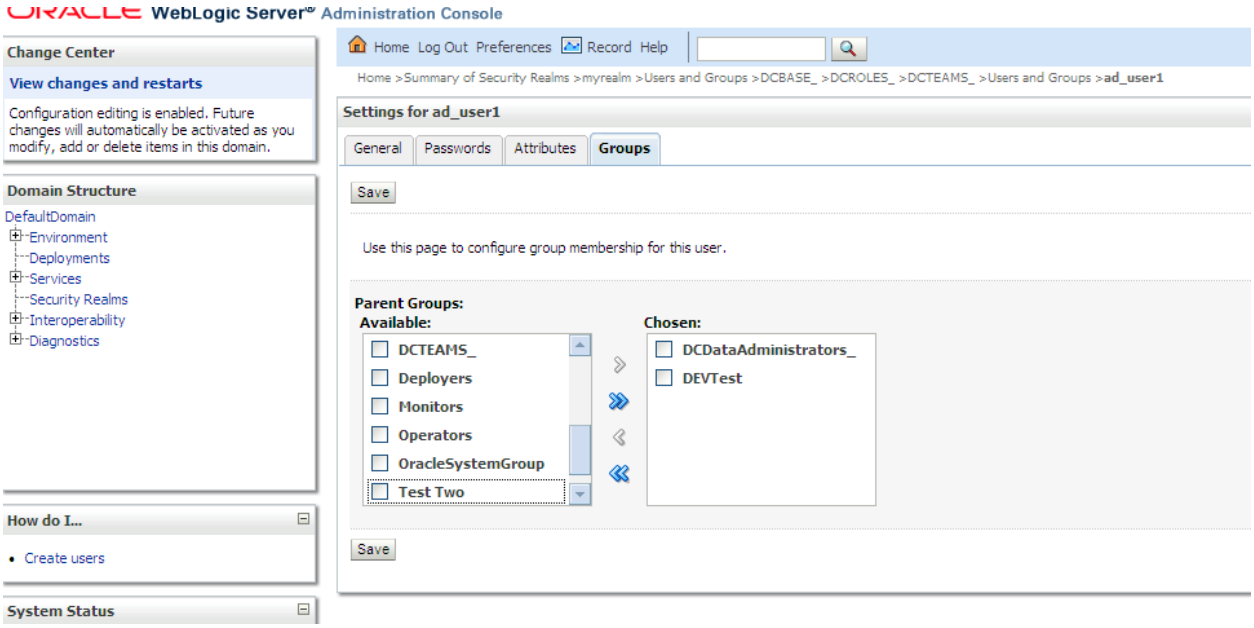


Figure 21 Creating Users for Worksite

18. Click New to create user ad_user1, for example.

NOTE: *Make note of the password. This information needs to be passed on to the user.*

19. Select the ad_user1. This opens the edit screen.
20. Select the groups tab. This allows you to select the roles and teams this user will belong to.
21. Select two: **DCDataAdministrators_*** and **MyDCTeam.** Move from Available to Chosen. This makes the ad_user1 a member of the MyDCTeam team and assigns ad_user1 the role of admin.

NOTE: * *Currently, OIDC only supports the DCDataAdministrators_ role.*

22. Click Save.

Chapter 7

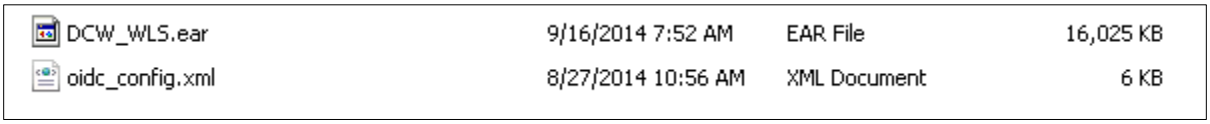
OIDC CONFIG XML FILE

With the OIDC Worksite 5.2 release, a user-maintainable configuration files, “oidc_config.xml” is used. The purpose of this file is to provide a place outside the application hierarchy (open directory or EAR) where settings for active skin, application title, callout environments, etc. can be maintained and not overwritten when the application is redeployed.

A template OIDC configuration file called “tmpl_wls_oidc_config.xml” can be found in the 05.02.00-oidc-worksite.zip file. You will have to replace the place-holder server names, IP addresses, and port numbers in this file with real values needed for your deployment environment.

OVERVIEW

The new oidc_config.xml file holds custom deployment configuration settings. This file exists outside of the EAR and resides as a sibling file to EAR file. This prevents subsequent deployments from overwriting the config settings.



Where does it go?

You have to place the oidc_config.xml in the location specified by “oracle.insurance.dc.appDirectory” in the WebLogic startup options. Please see WebLogic Startup Options on page 21.

For example

Oidc_config.xml :

You can create a designated folder where the oidc_config.xml can be placed.

Figure 22 Location of the oidc_config.xml File

Chapter 8

DEPLOYING APPLICATIONS TO WEBLOGIC

Installation procedure:

- Create an OIDC domain in WebLogic – Chapter 6
- Edit the deployment files – Chapter 6
- Download and place the Worksite file in location you can access – Chapter 7
- Deploy Worksite in WebLogic

Deploying in WebLogic Application Server

1. Prior to deploying, WebLogic must be started and running.
2. If the holding folder that you just edited is on a different machine, copy it to the machine where WebLogic is running.
3. Log in to the WebLogic Admin console. You can log in either remotely or on the machine where WebLogic is located. For example, http://HostName:7001/console

NOTE: *Where HostName is the name or IP of the server where WebLogic is installed.*
7001 is the most commonly used port for WebLogic. The port may have been changed when you created the OIDC domain. If WebLogic fails to display, check to make sure WebLogic has been started. If WebLogic has been started verify the host name and the port.

4. Click on the Deployments link on the left side of the screen.
5. Click Install.

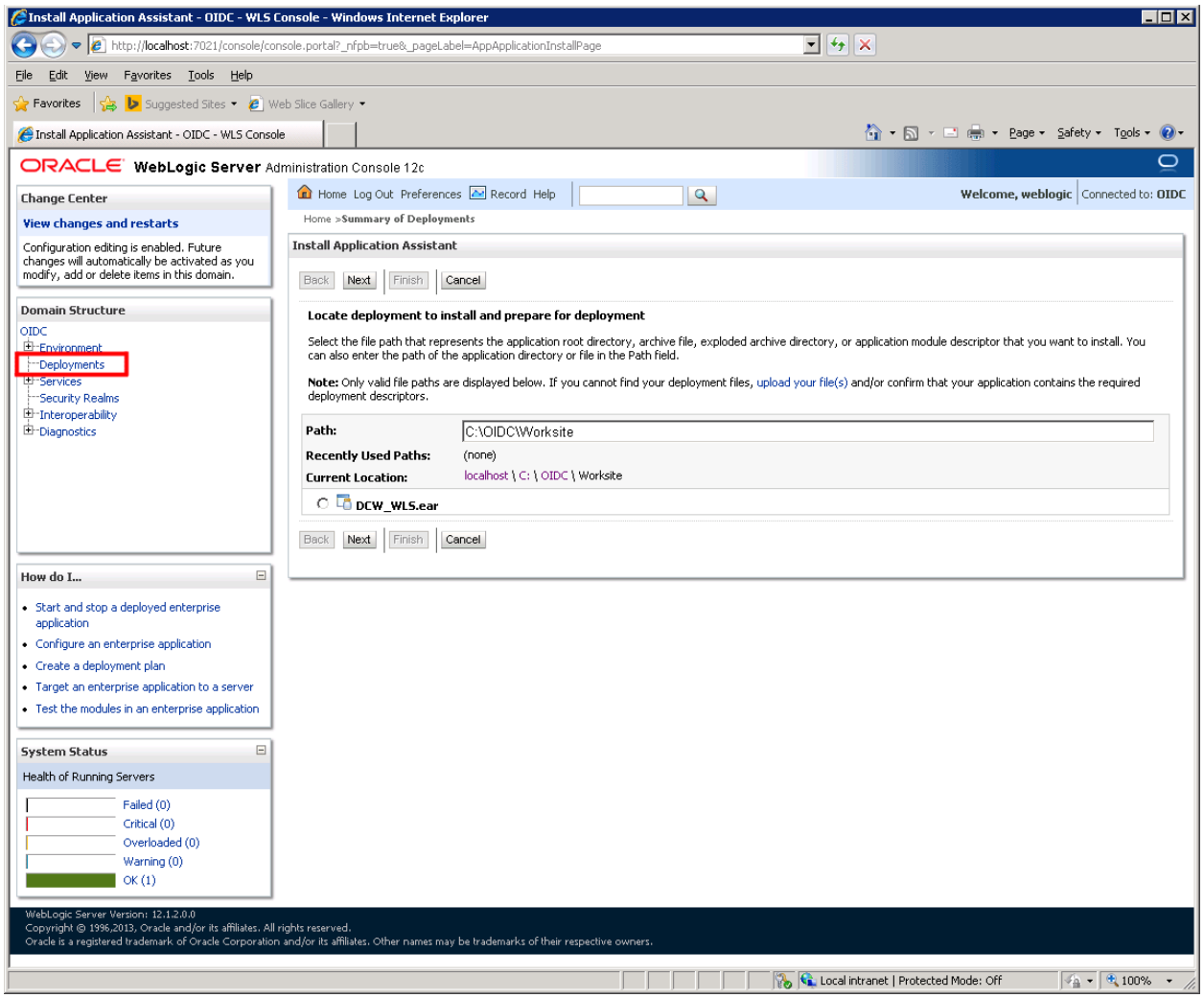


Figure 23 Selecting the DCW_WLS.ear File

6. You can enter in the path of the holding folder. Or you can navigate to it by selecting the available folders in the Current Location area. When you have reached the location of the holding folder, available directories will be listed.

7. Select DCW_WLS.ear. Click Next.

8. On the Install Application Assistant page, select to Install this deployment as an application. Click Next.

9. On the Optional Settings page, it is recommended that you keep the default values. You can re-name the deployment if you want. The name is for the deployment listing in WebLogic only. Click Finish.

10. After the deployment has been added, you will be placed on the Summary of Deployments page. The deployment you added will be listed. Read the messages at the top of the screen and correct any error messages.

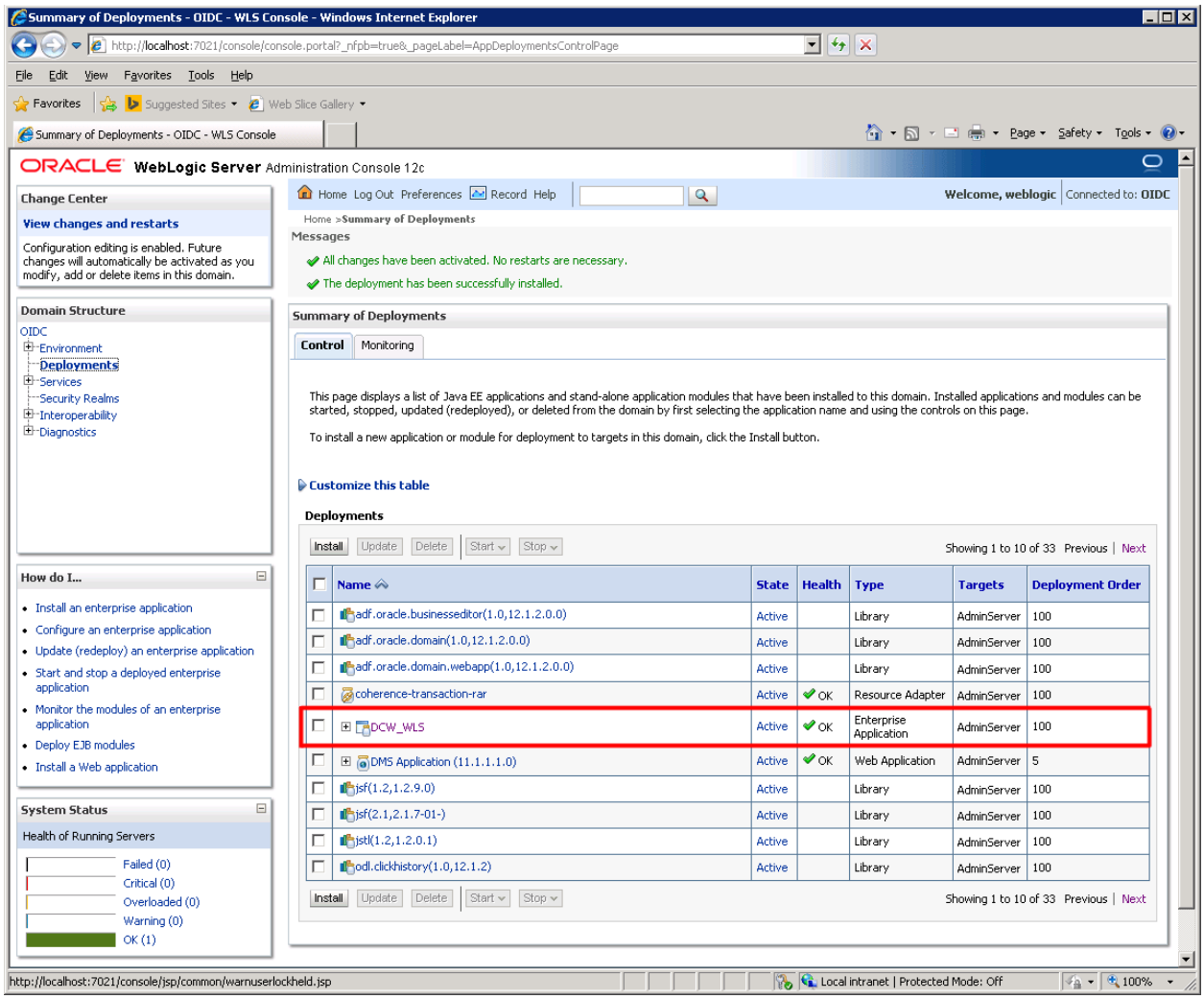


Figure 24 Completed Worksite Deployment

Chapter 9

OIDC PALETTE INSTALLATION

Installation procedure:

- Download and place Palette files in a location you can access
- Update Security Settings to allow for database information to be entered.
- Run the Palette Installation.
    - For Windows Server 2012 64-bit, you must run as administrator and allow the default application pool to run 32.
    - Have this information ready prior to installing Palette: The database server IP address, database name, user name, and password for the Palette database. This information is entered during the installation.
    - The database information also can be entered at a later time. Entering database information at a later time requires manual updates to the web.config file.
    - If you already have an Oracle Insurance Product Configuration (PC) instance, launch and deployment details can be entered, If you do not have this information, you can enter at a later time.
- Update the Application Pool.

NOTE: *The default directory structure of a NEW OIDC installation will be:*

C:\Program Files\Oracle\IGBU\DataCapture\5.2\Palette

Or

C:\Program Files (86)\Oracle\IGBU\DataCapture\5.2\Palette

A different default directory structure can be selected by the installer.

Update Security Policy

The security policy needs to be updated for this installation. This allows for database information to be entered directly at installation time. The updated security policy only needs to be in place for the install. After installation, the policy change can be reversed.

1. Start→Administrative Tools→Local Security Policy. A separate screen will open.

2. Select Local Policies→Security Options.

3. Scroll down to User Account Control: Behavior of the elevation prompt for administrators in Admin Approval Mode. Open this option.

4. Select to Elevate without prompting.

5. Click OK to save your changes.

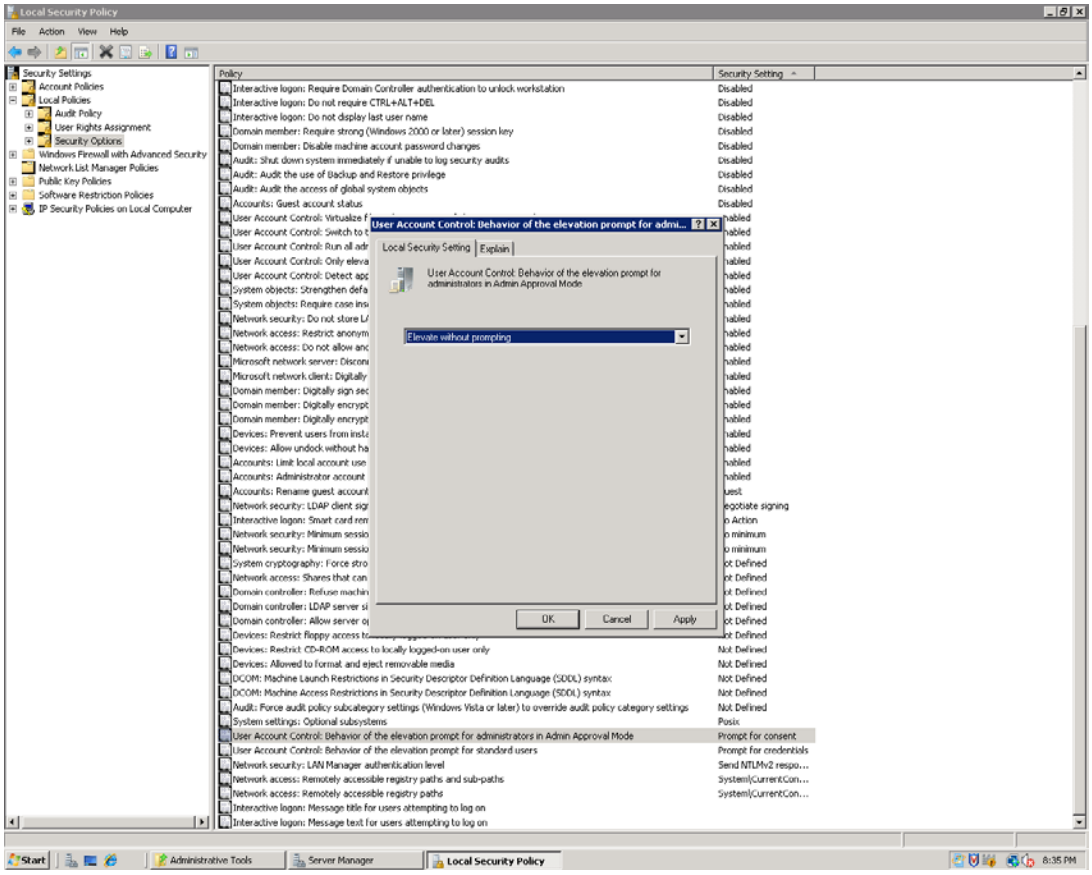


Figure 25 Security Settings

SERVER UPDATE – 64-BIT MACHINES ONLY

Prior to installing Palette, you will need to allow for 32-bit in the default application pool. If you do not, you may receive an error and Palette will fail to install. No error message will be displayed, the install will rollback without allowing for database information to be entered. No files will be created.

Updating the Default Application Pool

1. Click Start → Administrative Tools → select IIS Manager.

2. Expand the Local Computer and select Application Pools.

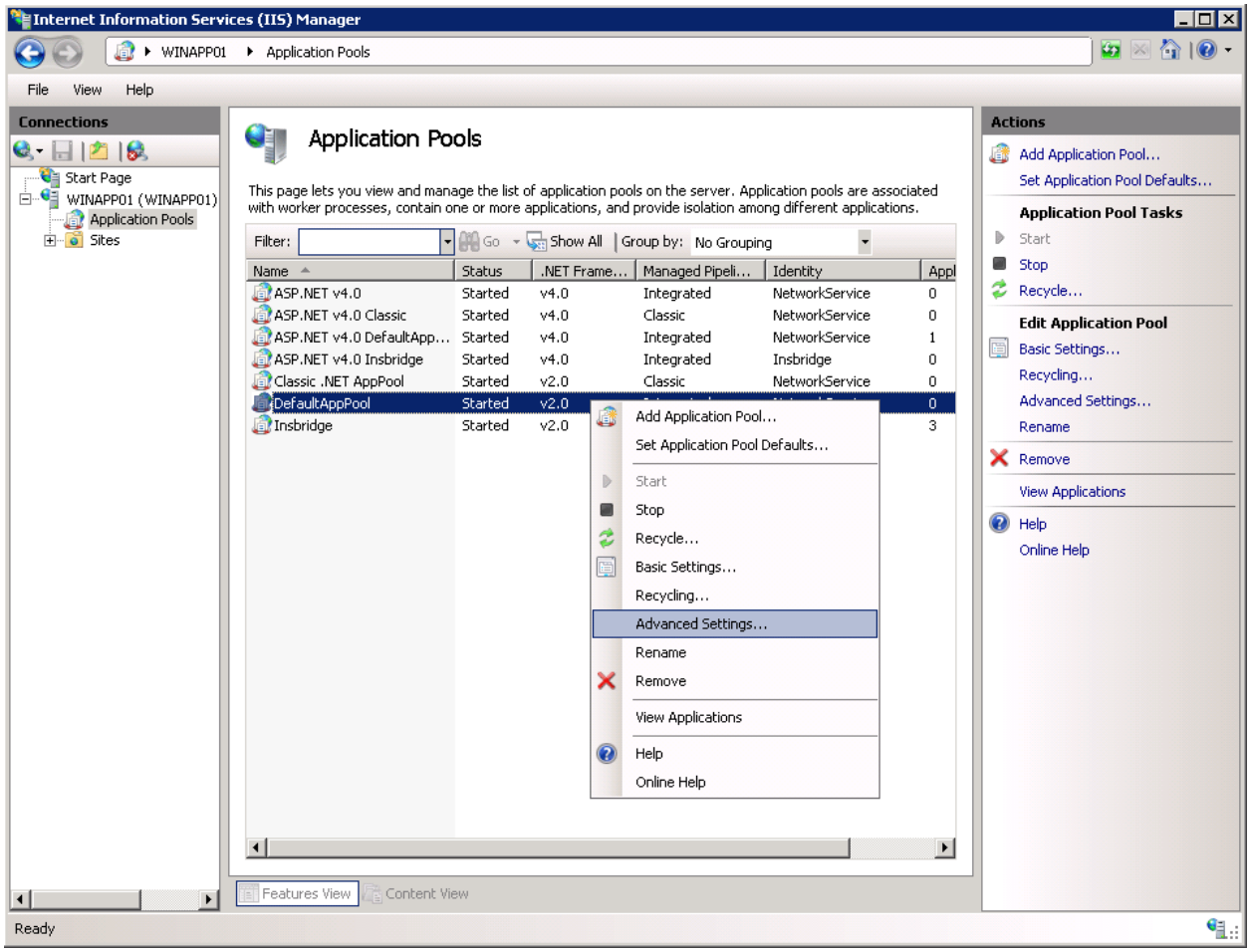


Figure 26 Navigating to Application Pool

3. Select the DefaultAppPool. Right click and select Advanced Settings. Check to ALLOW 32 bit. This option will be present in 64-bit machines only.

4. Click OK to save your changes.

5. Close Internet Information Services (IIS) Manager.

NOTE: *After the installation, you may reset the DefaultAppPool if needed.*

Running the Palette Installer

During the installation, the installation program requires the installer have administrator rights on the machine where the install is occurring. Please close all open applications and run the setup.exe file located in the Palette file.

1. Please close all open applications and run the **setup.exe** in the Palette file **as administrator**. A Welcome screen will be displayed.

   Right click the executable and select Run as administrator. You may be required to enter administrator credentials. If you do not run as administrator, the database entry screen will not be displayed and the application may not install properly.

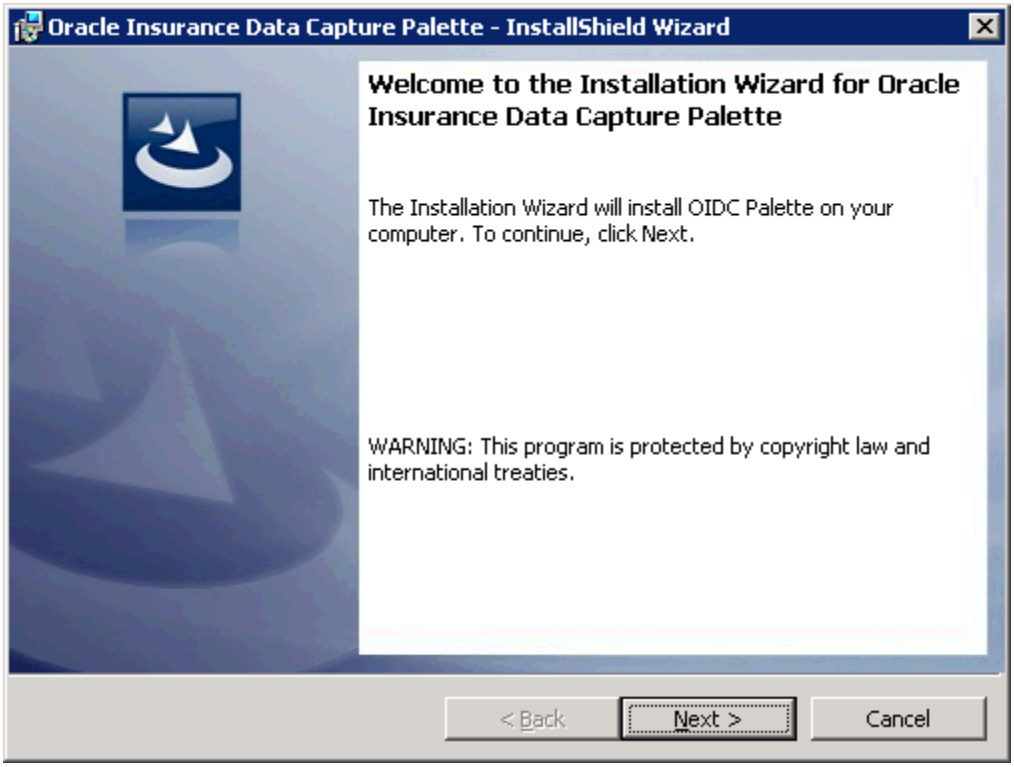


Figure 27 Welcome to Installing OIDC

2. Click on Next to continue.

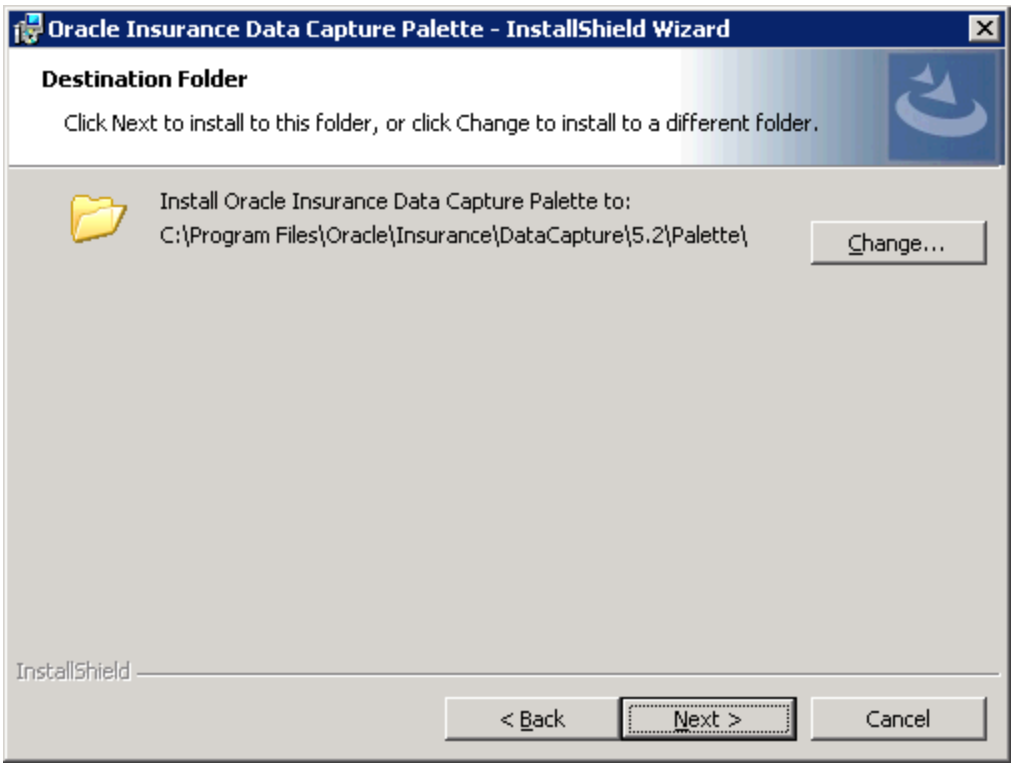


Figure 28 Selecting the Destination Folder

3. You have the option to select another installation directory. If you want another destination directory, browse for the directory you want to use. If the default installation directory is acceptable, Click Next.

4. An information screen will be presented. If the information is correct, click Install.

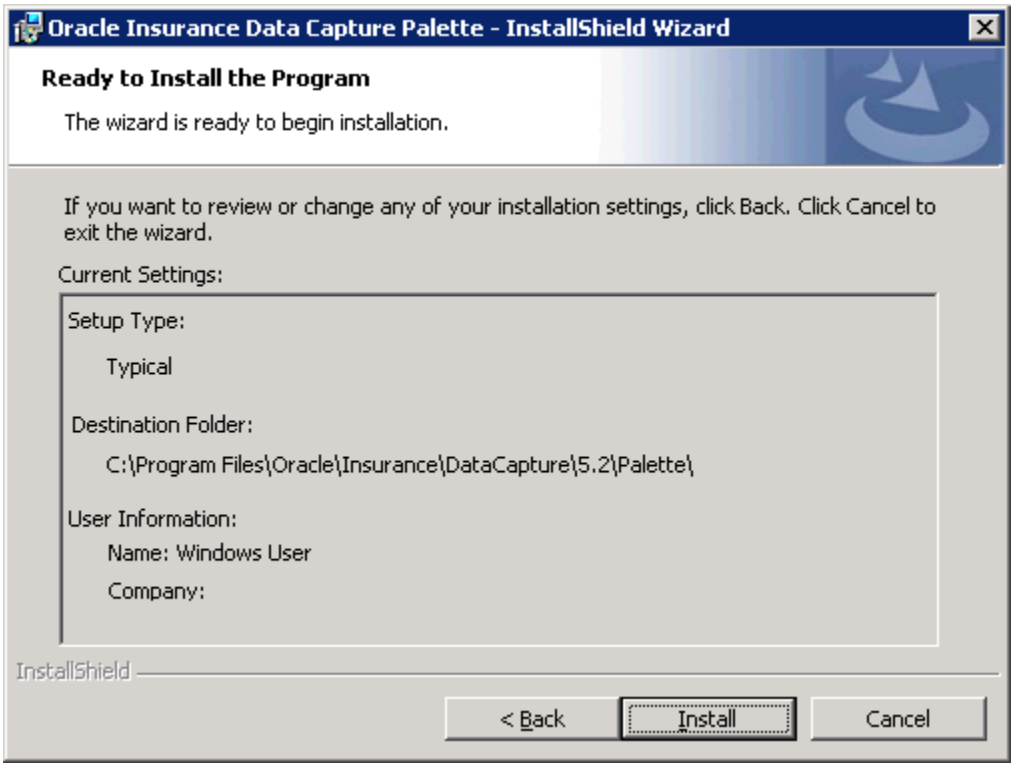


Figure 29 Ready to Install

If the information is not correct, click Back to return to the previous screen. Make your changes and then install when you are ready.

5. A progress screen will be displayed.

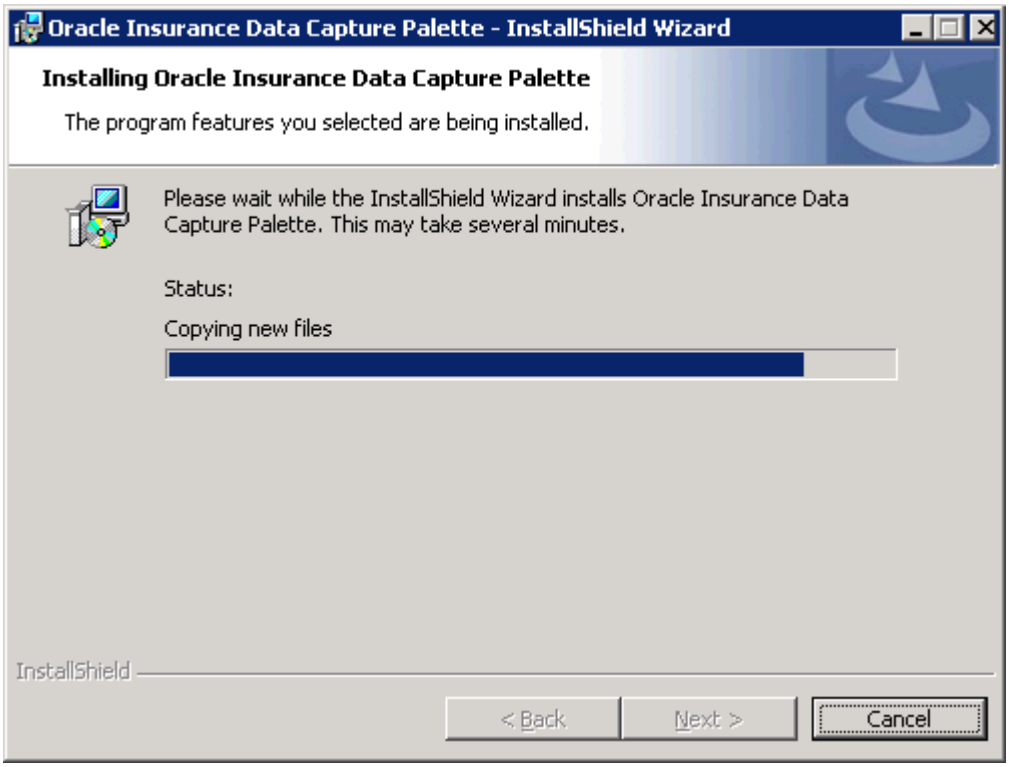


Figure 30 Palette Installation Progress

If the installation does not show any progress beyond this point, please verify that you are running as an administrator. Closing out the install at this point may result in the application not being installed properly.

If the application finishes without the database entry screen being displayed, you will have to manually enter the information. Please see Manually Updating Palette Web.Config File.

You also may uninstall the application and then run the installation again.

6. Enter in the System database information.

For Palette: The **Server** is the database server name or IP address, whichever is resolvable by the Palette web server, for the Palette database. The **Name** is the database name. The **User** is the database user name and **Password** is the password for the database user.

Test Connection: Test Connection is used to test the database connections. After you have made your entries, click **Test Connection**. A success or failure message will be returned. If you cannot resolve a connection issue, you can click Continue to complete the installation without correcting any errors. The entries will need to be corrected manually.

NOTE: *Database information can be entered manually if you do not have it at this time. Leave the fields blank and click Continue. Please see Manually Updating Palette Web.Config File.*

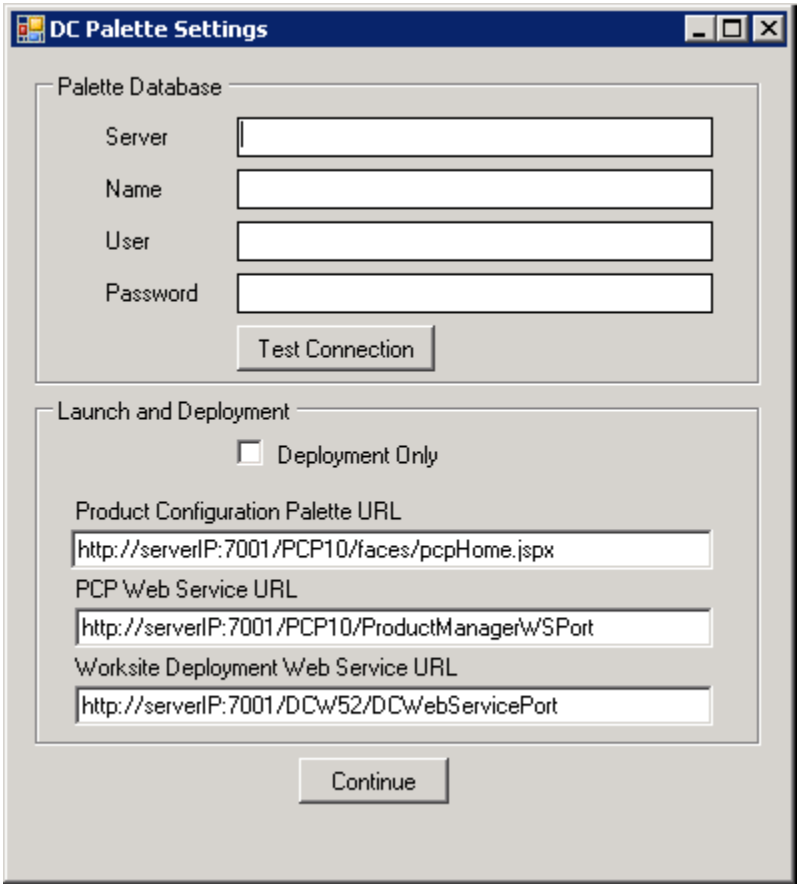


Figure 31 Entering Database Information

Launch and Deployment Settings

Launch and Deployment settings are the settings that are used to launch the Worksite application. These settings must be a URL that consists of server IP address, port number, and destination path. These settings can be updated manually if needed.

- Product Configuration Palette URL is the URL, including port, for the Product Configuration Palette component. Localhost must NOT be used in this URL.

- PCP Web Service URL is the URL for PC product management webservice hosted by PC.
- Worksite Deployment Web Service URL is the URL for the product management webservice hosted by PC.

When updating, only change the *localhost:7001* portion of the URL.

If these settings are not completed, they may be entered into the web.config manually.

Deployment Only: By default Palette can be launched only from PC. Enabling Deployment Only mode allows Palette to be launched directly but in a restricted read-only mode. This is the desired mode for Production environments where Data Capture content needs to be deployed but should not be edited. Users will not be allowed to create, edit, or work on questionnaires. Only deployments to the Worksite runtime will be allowed.

If you enable Deployment Only mode, no PC URL setting is required. If Deployment Only is not enabled, please provide users with the PC URL. This is used to re-direct users to the PC for proper launch of Palette if they attempt to launch it directly.

7. When you are finished with the entries, click Continue.

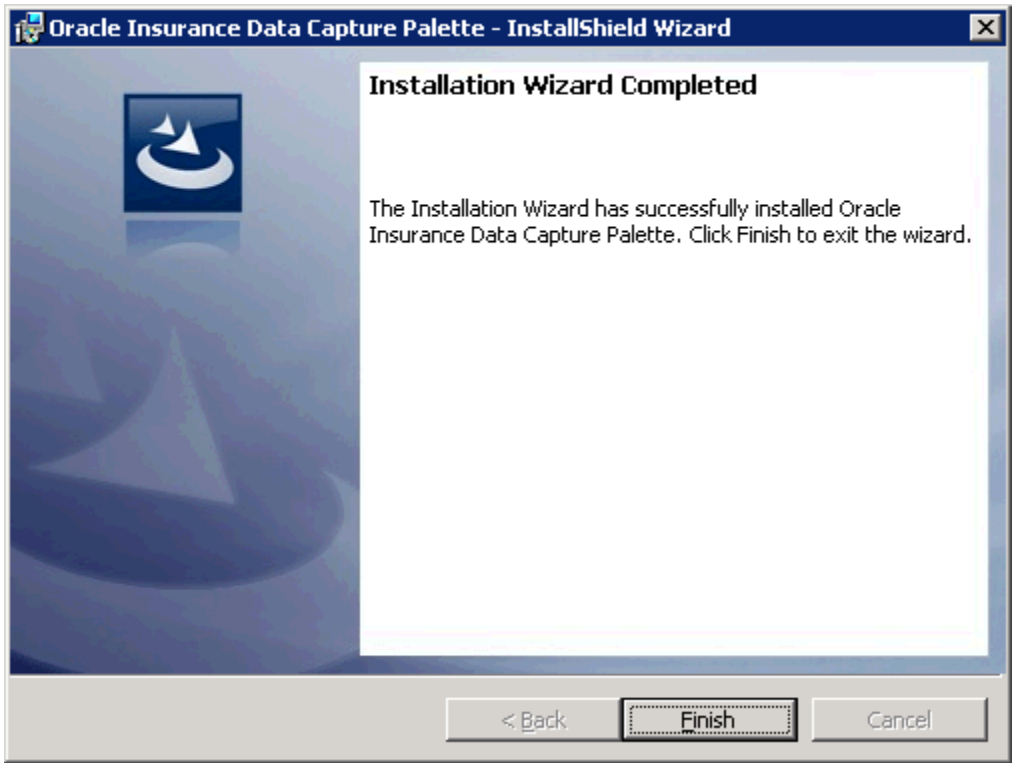


Figure 32 Completed Palette Install

8. Click Finish to finish the install.

SERVER UPDATES

An unstable session state may cause errors. To reduce the possibility of session state errors, you should create a separate OIDC application pool and then assign DCP51 to operate under this application pool.

To allow for quicker server response times you will need to enable compression.

Updating the OIDC Application Pool

The application pool should be created first.

1. Click Start → Administrative Tools → select IIS Manager.

2. Expand the Local Computer and select Application Pools. Select the OIDCAppPool.

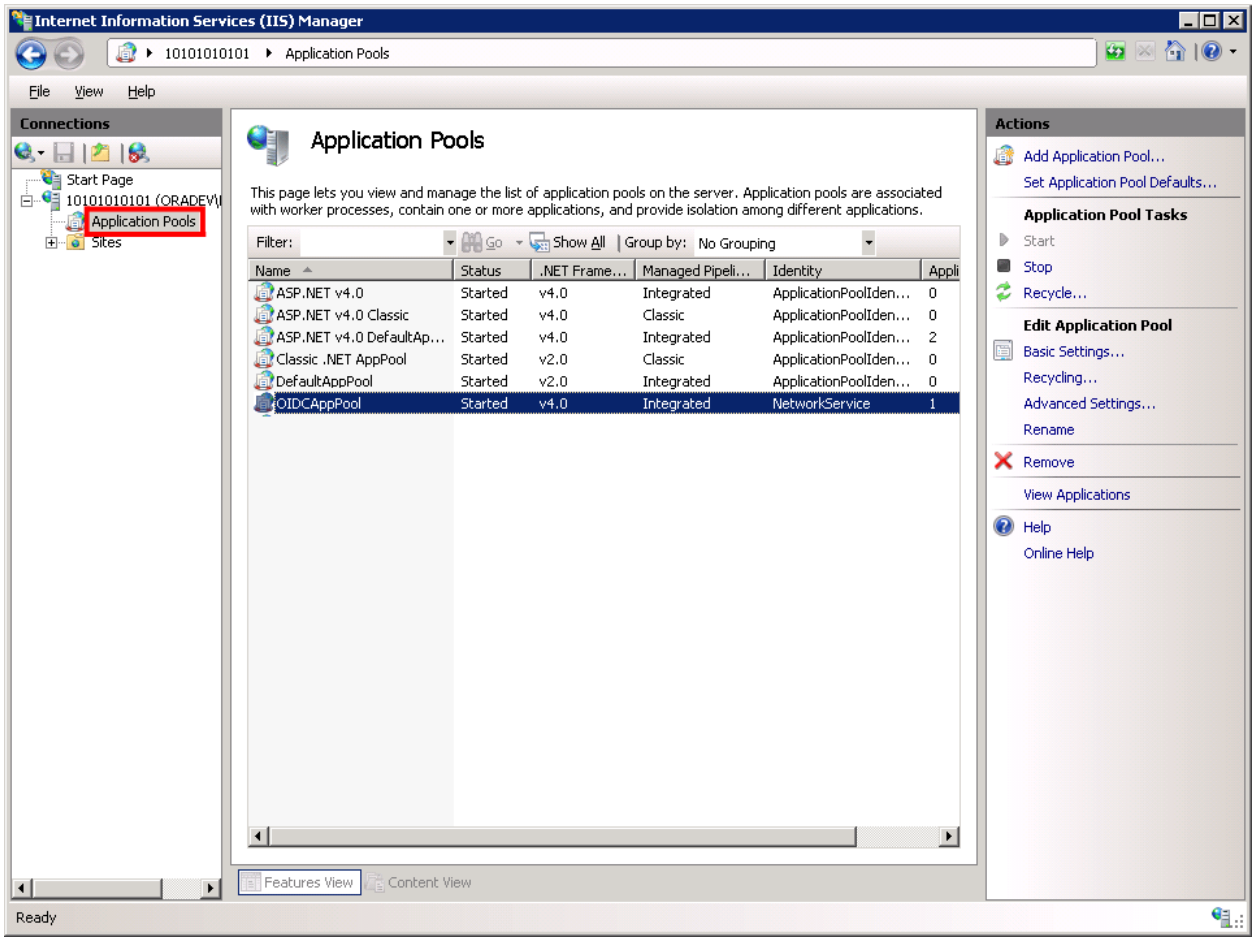


Figure 33 Navigating to Application Pool

3. Right click and select Advanced Settings. Update the Enable 32-bit Application to TRUE. This allows 32 bit. This option will be present in 64-bit machines only.

4. Select Idle Time-out (minutes) and change the value to 0.

5. Click OK to save your changes.
6. Stay in Internet Information Services (IIS) Manager → Application Pools.
7. Verify that ASP.NET 4.0 is started.

Chapter 10

LAUNCHING OIDC

Each of the three applications has a launch page. The launch page acts as a default home page for the application. To view and verify each application, open an Internet Explorer web browser to:

http://<*host-name* ***or*** *host-ip*>**:**<*port_number*>**/**<*context-root*>

Where:

- *host name* is the name of the server where Worksite was deployed
- *host-ip* is the IP address of the server where Worksite was deployed
- *port number* is the port used by the OIDC WebLogic domain. This is not needed for Palette.
- *context-root* is the name used by the application. There are three URL contexts for OIDC.

  - Palette – DCP52
  - Worksite – DCW52/faces/LoginPage.jspx

NOTE: *The default context-root value may be changed. Please make note of the exact value for the context-root. Context-root is case sensitive.*

URL Examples

- Palette may be launched directly from PC or have direct URL access. Direct access must be allowed at setup. Palette will not have a port number. If allowed at setup.

  For example: http://Server/DCP52

- Worksite can be launched at any time from a URL.

  For example: http://Server:7001/DCW52/faces/LoginPage.jspx

The URL information should be sent to the users along with the login name and password.

PALETTE LAUNCH URL

Palette can be launched directly from a URL if the Deployment Only option has been checked however it will operate in a read-only state. This is intended for Production environments where no questionnaire editing is desired but deployment to the Worksite runtime is needed.

In normal mode, if an attempt is made to launch Palette directly, users will receive a message directing them to launch Palette from PC.

Figure 34 OIDC Palette

Deployment Only Mode

Enabling Deployment Only mode allows Palette to be launched directly but in a restricted read-only mode. This is the desired mode for Production environments where Data Capture content needs to be deployed but should not be edited. Users will not be allowed to create, edit, or work on questionnaires. Only deployments to the Worksite runtime will be allowed.

Setting Up Deployment Only Mode:

To turn on the Deployment Only Mode, put “DEPLOY” inside the LaunchMode setting under:

```
<applicationSettings><OIDCPalette.Properties.Settings>

    <setting name="LaunchMode" serializeAs="String">
        <value>DEPLOY</value>
    </setting>
```

To Launch in Deployment Only Mode:

Open an Internet Explorer web browser either remotely on the local OIDC web server and browse to:

http://<*host-name or host-ip*>**/**<*context-root*>

NOTE: *The default context-root is DCP52. Please make note of the exact value for the context-root. Context-root is not case sensitive for DC Palette.*

Chapter 11

MANUALLY UPDATING PALETTE WEB.CONFIG FILE

You can manually update the connection string information in the web.config file. If you were able to complete the connection string information in the installation, you do not need to perform this step. If you are experiencing trouble with the application, you can manually check and update the connection string information.

NOTE: *It is strongly recommended that you make a copy of the current web.config file before you make any changes. In the event you need to do a rollback, you will have a working copy to restore.*

1. Make sure the Palette database has been restored, and the Worksite database has been created. Return to the server where Palette is installed. Follow the local path to the location of Palette. The local path will default to the initial installation path or a path selected by the installer. A common path is:

   C:\Program Files (x86)\Oracle\IGBU\DataCapture\5.2\Palette

2. Open the **web.config** file in Notepad.

3. Go down to the **connectionStrings** section. You will have to manually enter in the connection string information. There are four fields in each of the four connection strings that must be completed.

   The highlighted fields in the example below demonstrate where you will need to make an entry.

No Entries:

```
<connectionStrings>
        <add name="QuestionnaireDB" connectionString="" providerName="System.Data.SqlClient" />
        <add name="OracleDatabase" connectionString="" providerName="Oracle.DataAccess.Client" />
</connectionStrings>
```

Update Entries:

```
<connectionStrings>
   <add name="QuestionnaireDB" connectionString="Data Source=10.100.10.10\SQL;Initial
Catalog=OIDC_5.2;Persist Security Info=True;User ID=sa;Password=password;Enlist=False"
providerName="System.Data.SqlClient" />
   <add name="OracleDatabase" connectionString="USER ID=DCW_52;PASSWORD=password;DATA
SOURCE=DB002" providerName="Oracle.DataAccess.Client" />
</connectionStrings>
```

For QuestionnaireDB:

- **Password** is the password for the SQL Server database user.
- **UserID** is the user ID for the database. It is recommended that you use the sa login and password.
- **Initial Catalog** is the name of the database.
- **Data Source** is the name or IP address of the server where the database is located.

For OracleDatabase:

- **Password** is the password for the Oracle database user.
- **UserID** is the name of the schema owner.
- **Data Source** is the name or IP address of the server where the database is located and the instance ID.

4. **Save** your changes. No error message will be thrown for incorrect entries.

To test your entries, try accessing the application. If you cannot access the application, please re-check your entries.

Updating the Launch URLS

Launch URLs that were not entered at setup or need to be adjusted can be updated in the web.config file found on the server where Palette was installed. The default setting is localhost:7001.

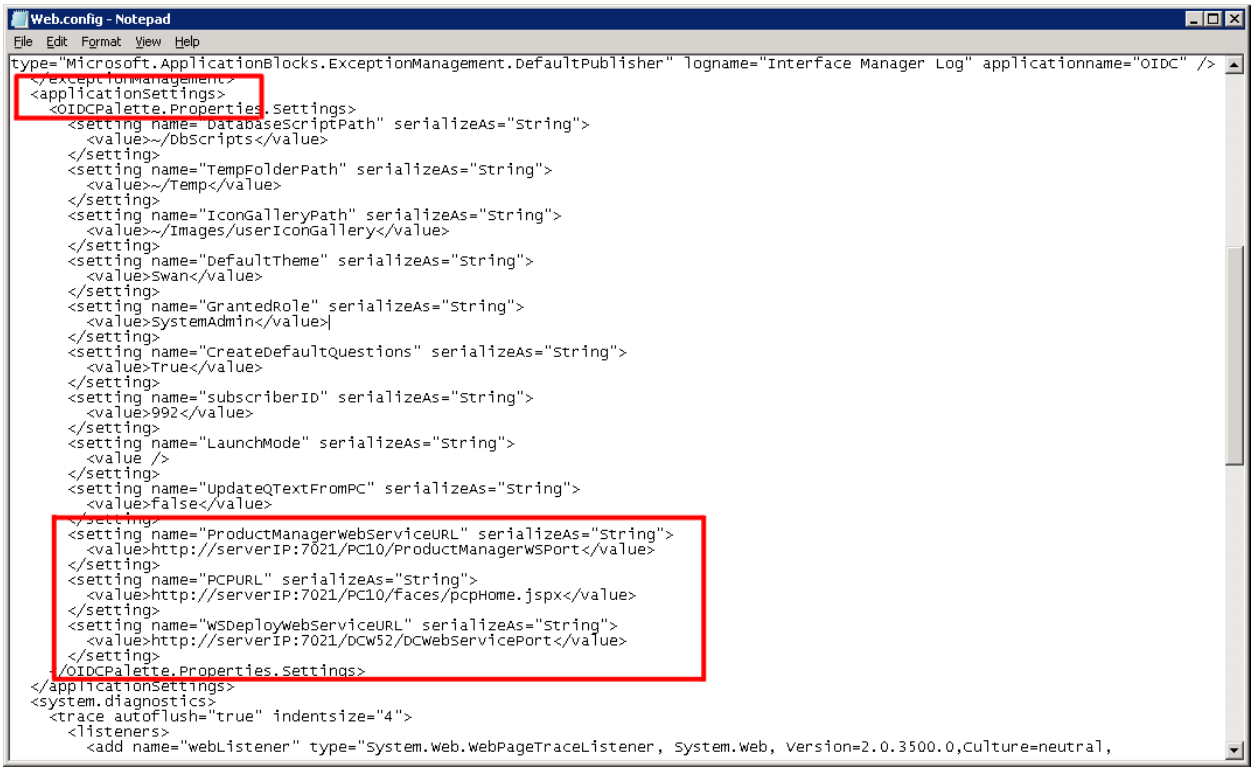


Figure 35 Updating the WebLogic Location

1. Return to the server where Palette is installed. Follow the local path to the location of Palette. The local path will default to the initial installation path or a path selected by the installer. A common path is:

   C:\Program Files (x86)\Oracle\IGBU\DataCapture\5.2\Palette

2. Open the **web.config** file in Notepad.

3. Go down to the **applicationSettings** section. You will have to manually update launch information. There is one field in each of the two launch settings that can be updated.

   The highlighted fields in the example below demonstrate where you will need to make an entry.

No Entries:

```
<applicationSettings>
        <OIPalette.Properties.Settings>
          <setting name="DatabaseScriptPath" serializeAs="String">
                <value>~/DbScripts</value>
          </setting>
          <setting name="TempFolderPath" serializeAs="String">
                <value>~/Temp</value>
          </setting>
          <setting name="IconGalleryPath" serializeAs="String">
                <value>~/Images/userIconGallery</value>
          </setting>
          <setting name="DefaultTheme" serializeAs="String">
                <value>Swan</value>
          </setting>
          <setting name="GrantedRole" serializeAs="String">
                <value>SystemAdmin</value>
          </setting>
          <setting name="CreateDefaultQuestions" serializeAs="String">
                <value>True</value>
          </setting>
          <setting name="LaunchMode" serializeAs="String">
                <value></value>
          </setting>
          <setting name="ProductManagerWebServiceURL" serializeAs="String">
                <value>http://localhost:7001/PC10/ProductManagerWebPort</value> WSPort?
          </setting>
          <setting name="PCPURL" serializeAs="String">
                <value>http://localhost:7001/PC10/faces/pcpHome.jspx</value>
          </setting>
          <setting name="WSDeployWebServiceURL" serializeAs="String">
                <value>http://localhost:7001/DCW52/DCWebServicePort</value>
          </setting>

        </OIPalette.Properties.Settings>
  </applicationSettings>
```

Update Entries:

```
<applicationSettings>
   <OIPalette.Properties.Settings>
     <setting name="DatabaseScriptPath" serializeAs="String">
       <value>~/DbScripts</value>
     </setting>
     <setting name="TempFolderPath" serializeAs="String">
       <value>~/Temp</value>
     </setting>
     <setting name="IconGalleryPath" serializeAs="String">
```

```
      <value>~/Images/userIconGallery</value>
    </setting>
    <setting name="DefaultTheme" serializeAs="String">
      <value>Swan</value>
    </setting>
    <setting name="GrantedRole" serializeAs="String">
      <value>SystemAdmin</value>
    </setting>
    <setting name="CreateDefaultQuestions" serializeAs="String">
      <value>True</value>
    </setting>
    <setting name="LaunchMode" serializeAs="String">
      <value>DEPLOY</value>
    </setting>
    <setting name="ProductManagerWebServiceURL" serializeAs="String">
      <value>http://appserver001:7021/PC10/ProductManagerWSPort</value>
    </setting>
    <setting name="PCPURL" serializeAs="String">
      <value>http://appserver001:7021/PC10/faces/pcpHome.jspx</value>
    </setting>
   <setting name="WSDeployWebServiceURL" serializeAs="String">
      <value>http://appserver001:7021/DCW52/DCWebServicePort</value>
    </setting>

  </OIPalette.Properties.Settings>
</applicationSettings>
```

For ProductManagerWebServiceURL:

- **Localhost** is the server where PC has been deployed.
- **7001** is the default port number for WebLogic. Update to the port number where PC has been deployed.

For PCURL:

- **Localhost** is the server where PC has been deployed.
- **7001** is the default port number for WebLogic. Update to the port number where PC has been deployed.

NOTE: *LaunchMode determines the general operational behavior for Palette. DEPLOY indicates that Palette will work in a deployment only mode and no editing of content will be allowed. This is desirable when Palette is being used in a Test or Production environment and you want to prevent any changes from being made to your questionnaire content. If the field is blank, Palette will allow access to all of its functionality.*

4. Verify your entries and **Save** your changes. No error message will be thrown for incorrect entries.

To test your entries, try accessing the application. If you cannot access the application or receive a "*configuration file is not well-formed XML*" error message, please re-check your entries.

CONTACTING MY ORACLE 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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