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Insbridge Enterprise Rating

Implementing a Shared Workfiles Location Guide

Release 5.2.x

July 2016

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Oracle Insurance Insbridge Enterprise Rating Implementing a Shared Workfiles Location Guide

Release 05.02.xx

Part # E76658-01

Library # E76672-01

July2016

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PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating Implementing a Shared WorkFiles Location Guide*. The Insbridge Enterprise Rating (Insbridge) 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.

AUDIENCE

This guide is intended for system administrators, and others tasked with installing and configuring the Insbridge 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
bold	Boldface type indicates graphical user interface elements associated with an action.
italic	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.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-794-01	R 4.6.1	November 2012	Introduced for release 4.6.1
2nd Edition	P01-794-02	R 4.7	September 2013	Update release
3rd Edition	P01-794-03	R 4.8	August 2014	Update Release
4th Edition	P01-794-04	R 4.9	December 2014	Update Release
5th Edition	P01-794-05	R 5.0.1	August 2015	Update Release
6th Edition	P01-794-06	R 5.1	December 2015	Update Release
7th Edition	P01-794-07	R 5.2	July 2016	Update Release

QUICK VIEW

IMPLEMENTING A SHARED WORKFILES LOCATION

A shared Workfiles location allows for multiple instances of RateManager to share the same Workfiles. A shared workfiles location is required for Table Job exports. The Insbridge server and the shared location must be on the same domain. The Insbridge user from the RateManager instance must be a user on the share domain also. If the Insbridge user is not, users will not be able to write files to the share.

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

Workfiles from previous a location can be copied over to the shared location if needed,

Installation Procedures:

Step 1: Verify the Insbridge application pool on the server where the Insbridge system has been installed. Verify the Insbridge sites have been assigned to the Insbridge application pool.

Step 2: Verify that the Insbridge com+ settings, and the Insbridge message service all are set to the Insbridge user.

Step 3: On the share server, create a new Workfiles folder. Give the Insbridge user full permission to the new Workfiles folder. Copy Workfiles from previous location if necessary.

Step 4: 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 Insbridge 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.

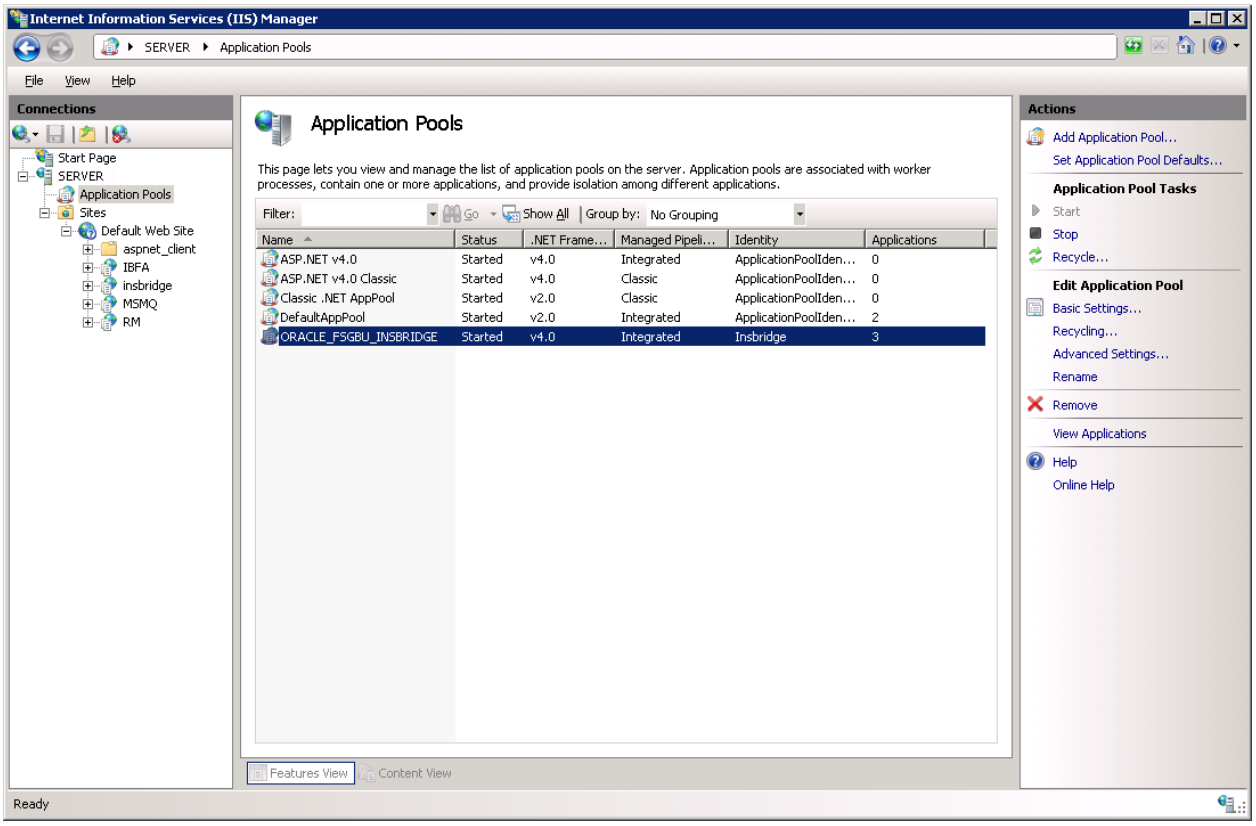
- **Access to the server where Insbridge has been installed**
- **The Insbridge User Account. This is the user used to install Insbridge.**
- **Access to the server where Workfiles will be moved to.**

STEP 1: VERIFY THE INSBRIDGE APPLICATION POOL

A default Insbridge Application Pool is created at installation. This pool ORACLE_FSGBU_INSBRIDGE should be used for the Oracle applications. Please verify that the Insbridge web applications are associated with the new Insbridge application pool.

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

2. Expand the **Local Computer** and select **Application Pools**. Verify the ORACLE_FSGBU_INSBRIDGE application pool, the Identity is Insbridge and that there are 3 applications associated. If the pool is correct, proceed to the next step.



If the ORACLE_FSGBU_INSBRIDGE has not been created, you will have to create one. Please see Appendix A, Creating an Application Pool.

STEP 2: VERIFY SETTINGS FOR INSBRIDGE USER

Next, you should verify the component services and Insbridge message service.

1. Click **Start→Administrative Tools→Component Services**.
2. Expand the **Component Service**s option under console Root.
3. Expand **Computers→My Computer→COM+ Applications**.
4. Expand each Insbridge **COM+ library** to make sure there are components listed underneath each compartment.

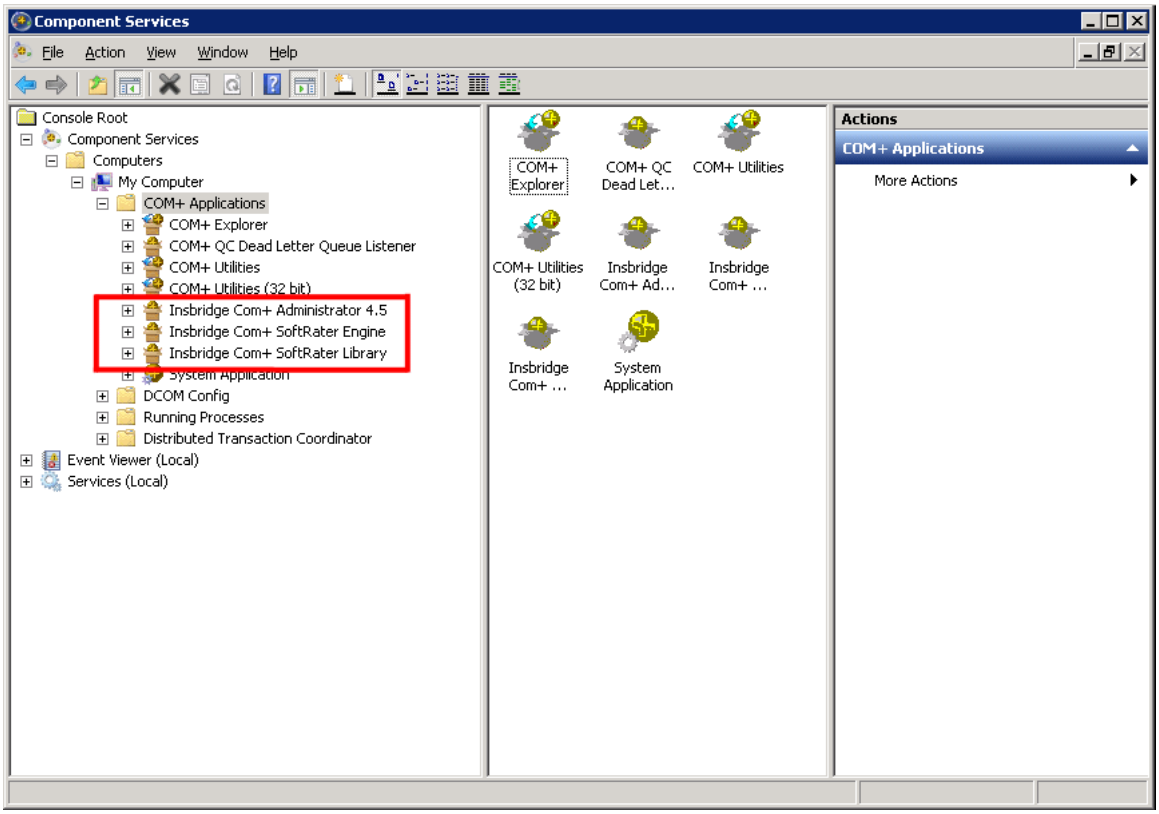


Figure 1 Component Services

There should be 3 Insbridge Com+ Applications libraries:

- Insbridge Com+ Administrator 4.5
- Insbridge Com+ SoftRater Engine
- Insbridge Com+ SoftRater Library

NOTE: *If any COM+ library is missing, run the Insbridge install again from the msi file and choose uninstall. Then rerun the IBFA install. Uncheck the RateManager Install. Then check again to see if all the libraries are listed. If they are still not listed, please log a Service Request with Support.*

Verify the Identity of the Com+ Applications Libraries

Please note that you should not have to make any changes to any COM+ Application library. The installation will automatically apply the Insbridge user name and password that you created earlier to the necessary libraries.

1. Select the Insbridge Com+ Administrator 4.5.
2. Right click and select Properties.
3. Select the Identity tab.
4. Verify that the User is Insbridge. If the user is System Account or is not set to the Insbridge user, change to the Insbridge user set up earlier.

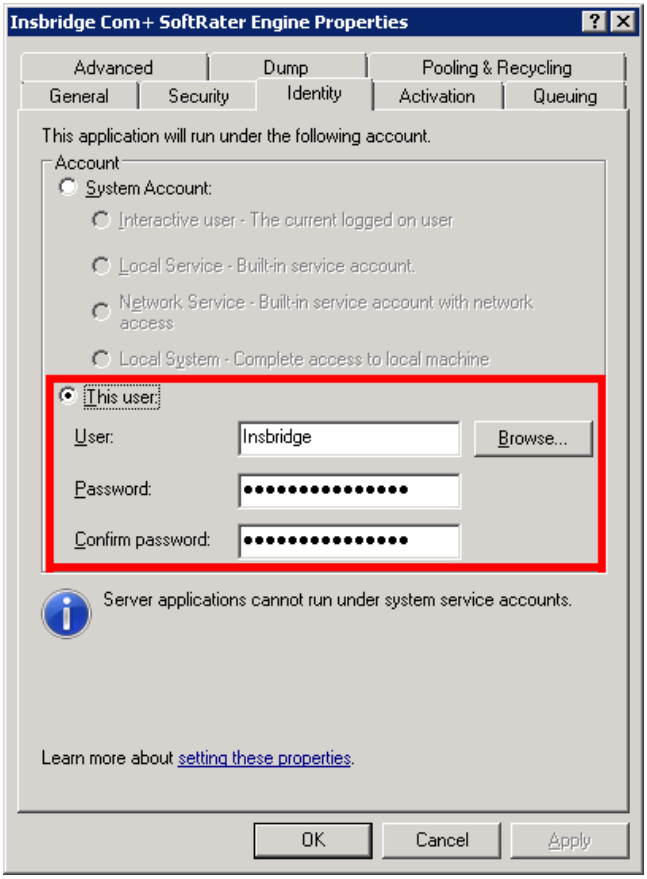


Figure 2 Updating Com Plus to the Insbridge User

5. Repeat for the other com+ services.

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 Insbridge**.

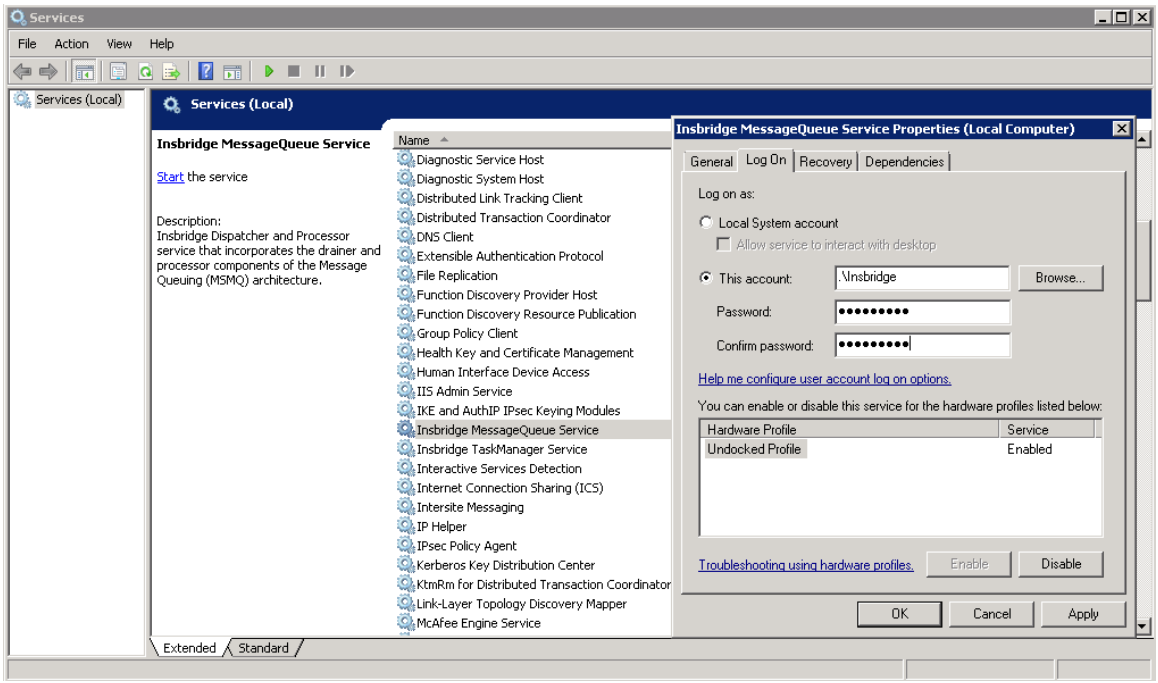


Figure 3 Verifying Insbridge Message Service

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

STEP 3: 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 from the instance where RateManager was installed full permission to the new WorkFiles location.

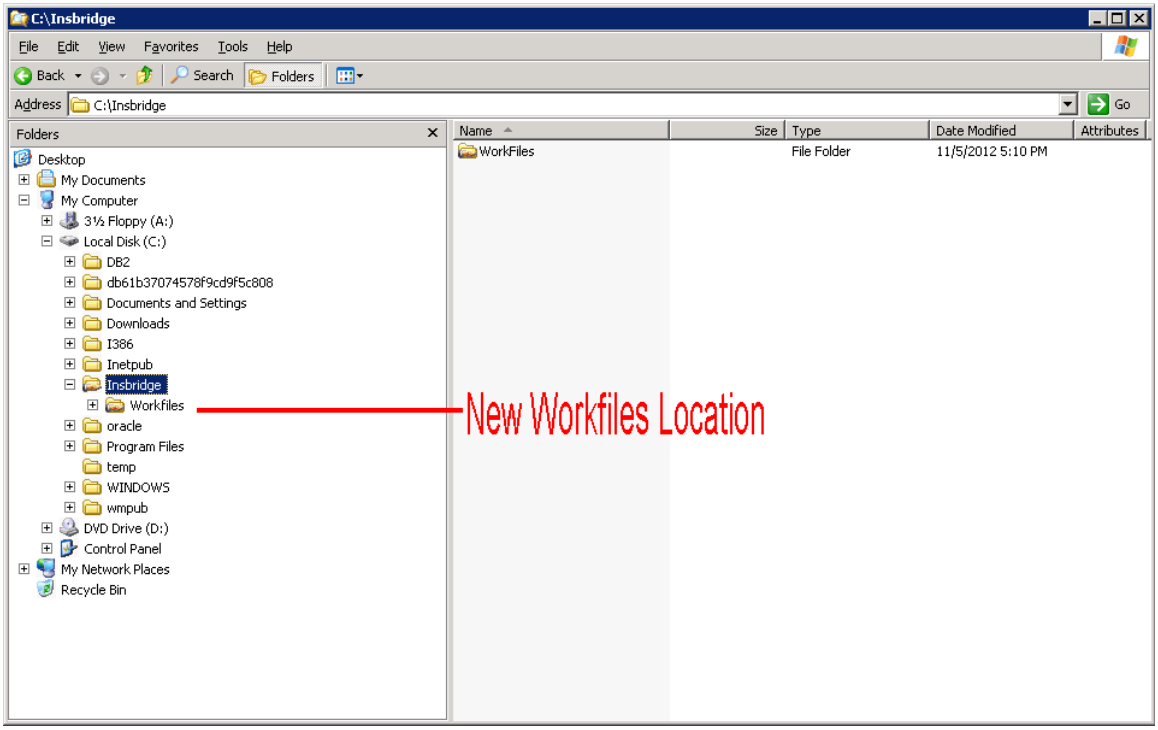


Figure 4 Creating a New Workfiles Location

Moving Previous Workfiles

It is not necessary to move any previous Workfiles unless users need access. Please see Optional Step.

You 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.

NOTE: *Workfiles may be contain thousands of file and be large in size. Selected files in Workfiles can be moved if necessary.*

STEP 4: 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**.

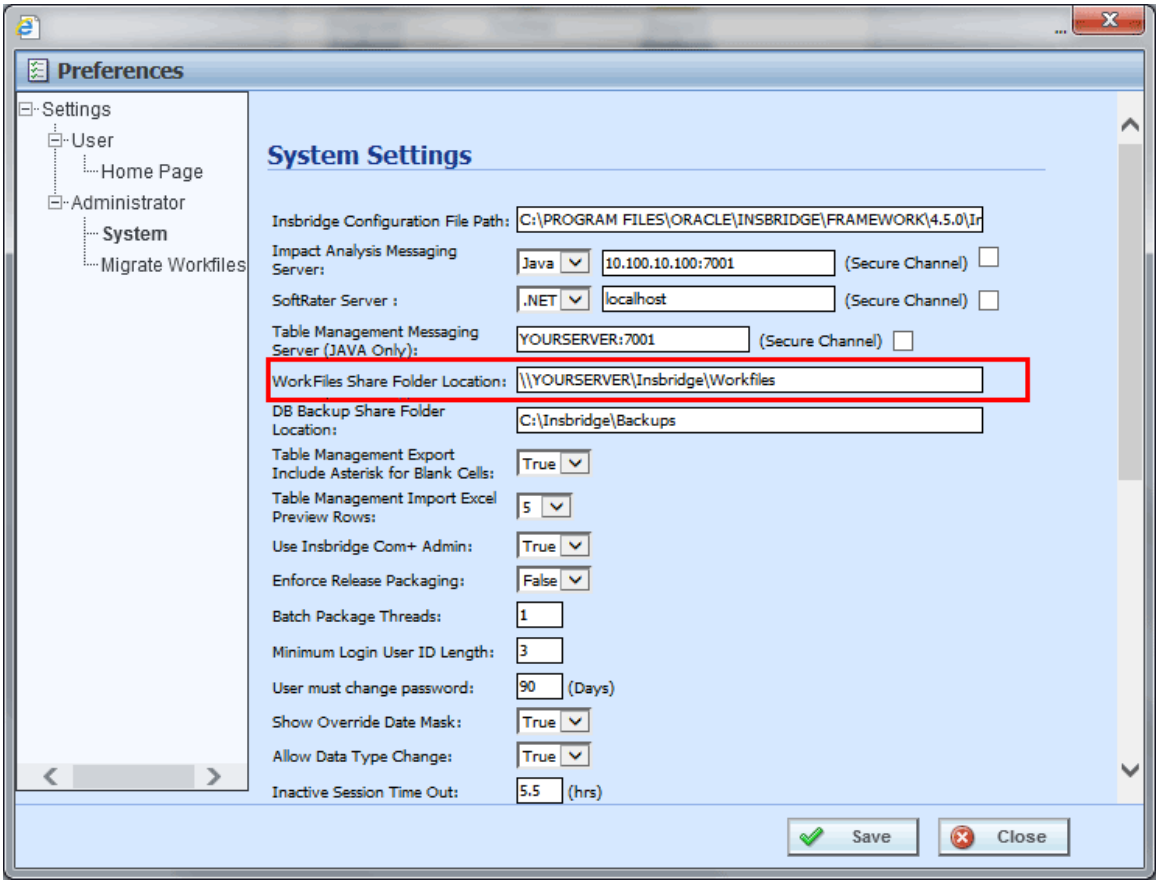


Figure 5 Preferences Settings

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.

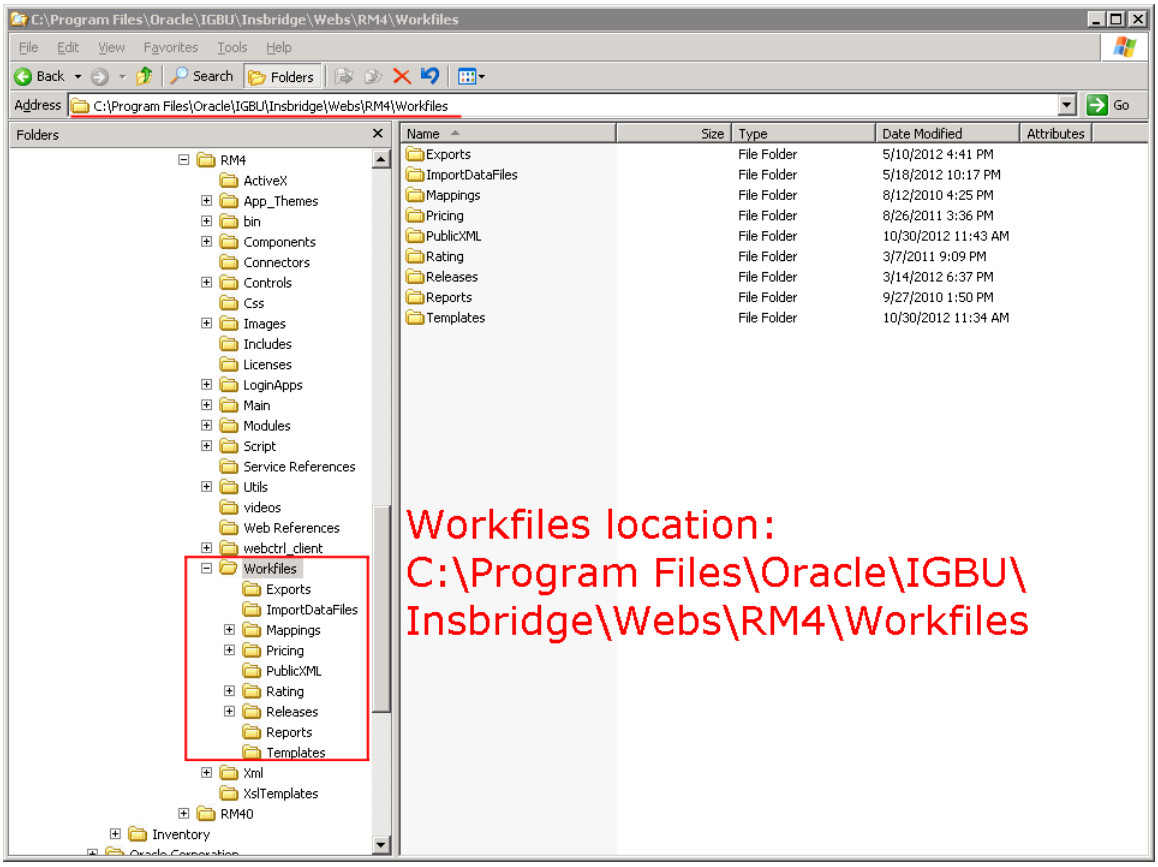


Figure 6 Location of WorkFiles

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\RM*xxx*\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 to 4.8:

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

For Release 4.9 to current:

- **File Name:** Workfiles
- **Location:** [DRIVE]:\Program Files\Oracle\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.

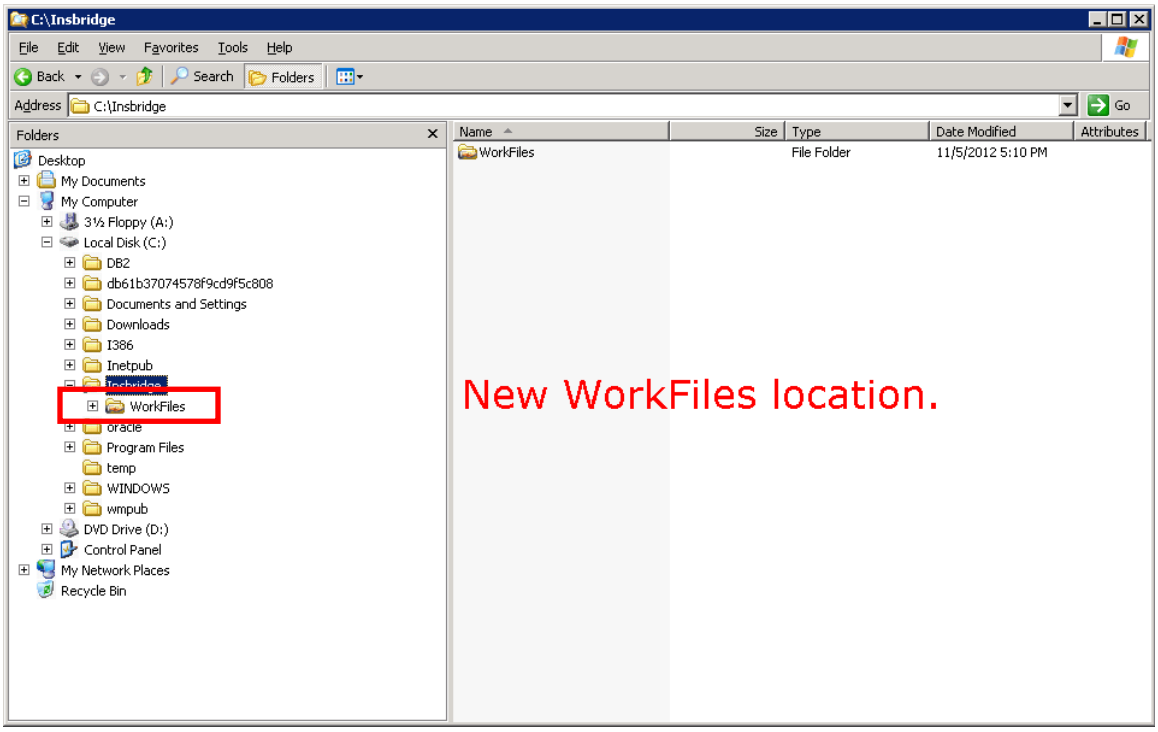


Figure 7 Copying Workfiles

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.

Appendix A

CREATING AN APPLICATION POOL

If the Insbridge application pool needs to be created, you can create one. The Insbridge installation must be complete prior to creating an application pool. Make sure that Static Content is enabled in the Server Manager Roles.

There are three steps to creating an Insbridge application pool and then assigning the virtual directories.

- **Step 1:** Create or Verify an Insbridge Application Pool.
- **Step 2:** Verify settings.
- **Step 3:** Associate the Insbridge application pool with virtual directories IBFA, insbridge, RM

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

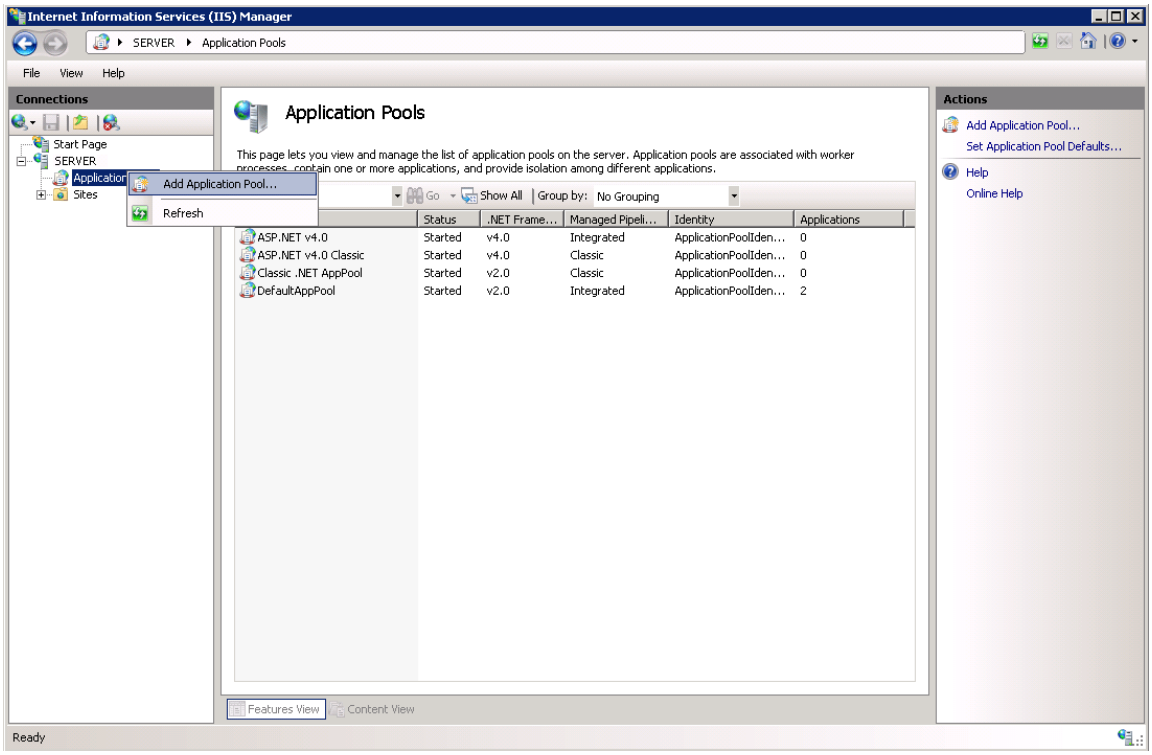


Figure 8 Navigating to Application Pool

3. Enter “**Insbridge**” for the Application pool Name. Select the **v4.0 for the .NET Framework version**. Click **OK**. You will be returned to the IIS screen. Your new application pool is listed.

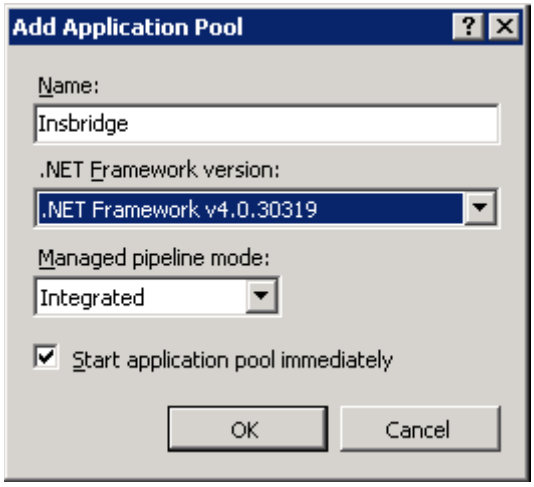


Figure 9 Creating a New Application Pool

Step 2: Update Settings

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

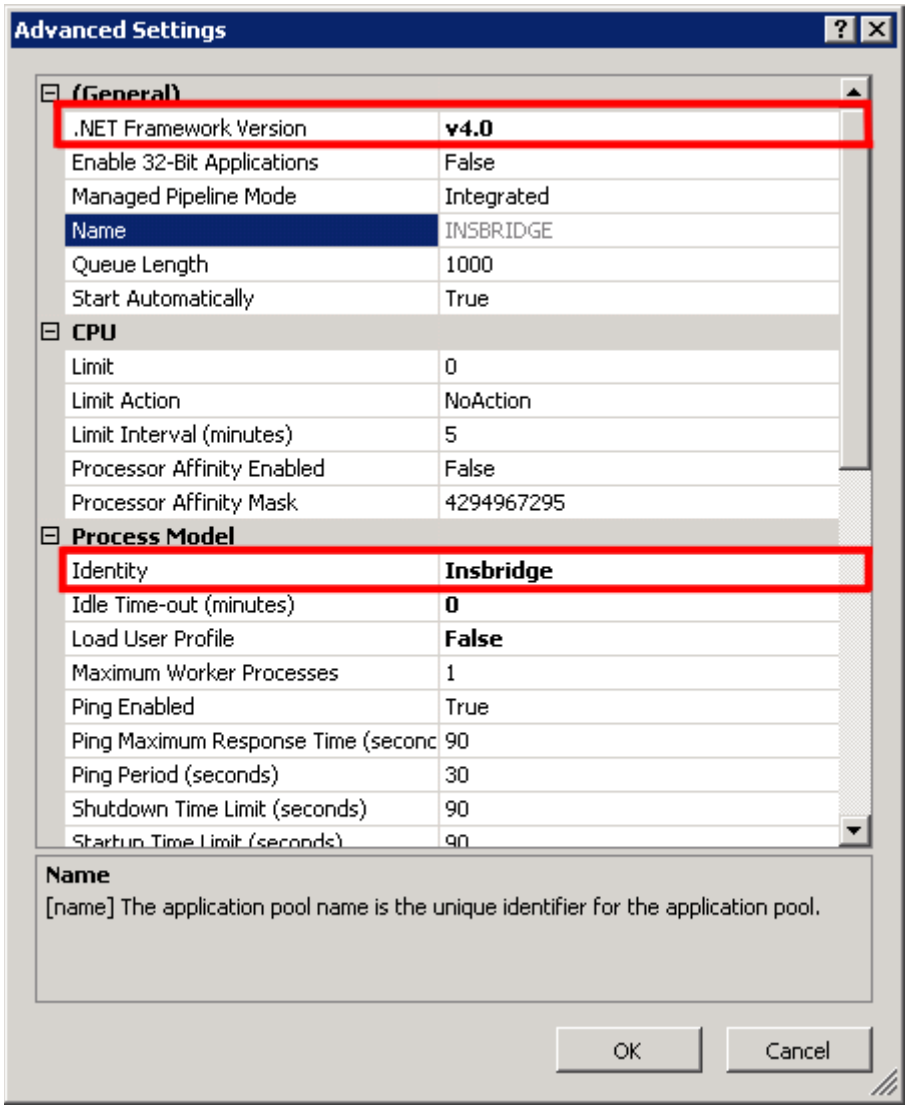


Figure 10 Selecting Application Pool Properties

2. Verify that the .NET Framework Version is v4.0.

3. Verify the identity is Insbridge. If the identity is not Insbridge, you can update it. For the Identity **choose to use custom account and enter the same user that was used to install Insbridge**.

4. Click **OK** to save your changes.

Step 3: Associate the web applications with the Insbridge Application Pool

Next, you will need verify or associate 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**.

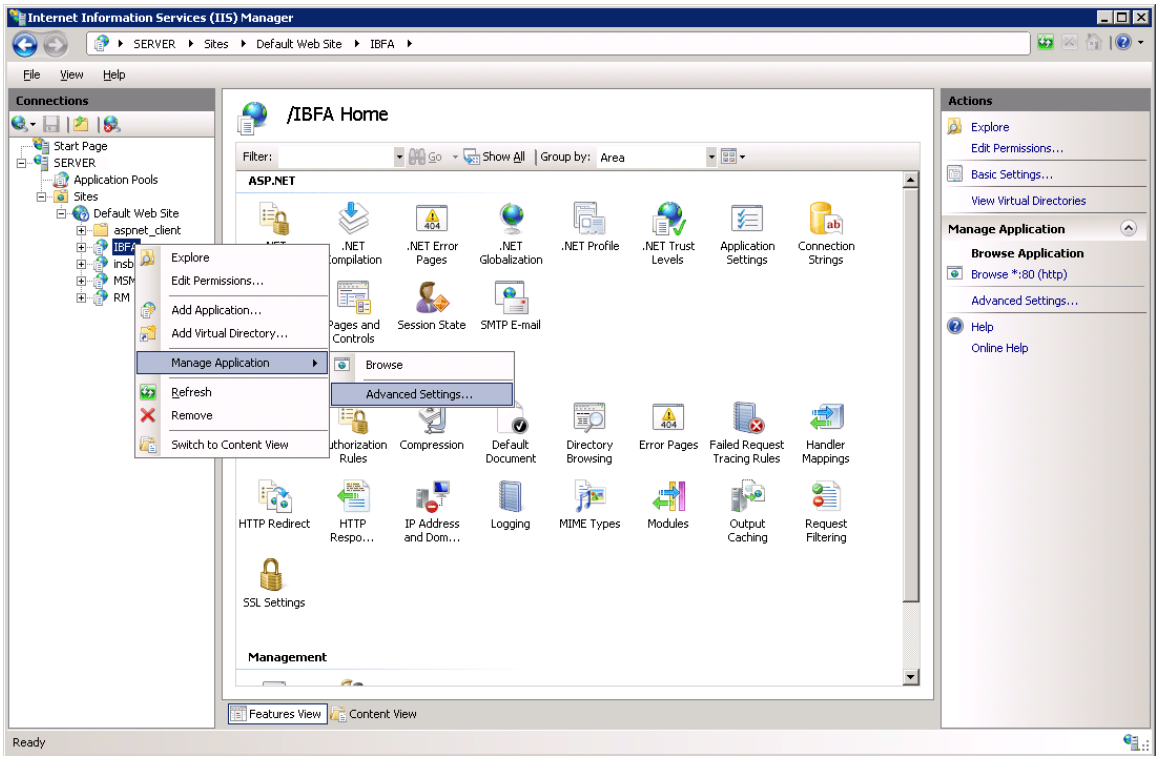


Figure 11 Associating the Virtual Directories with the Insbridge Application Pool

2. Under the General Settings → Application Pool, click the Application Pool entry field to see the ellipsis (…) button.

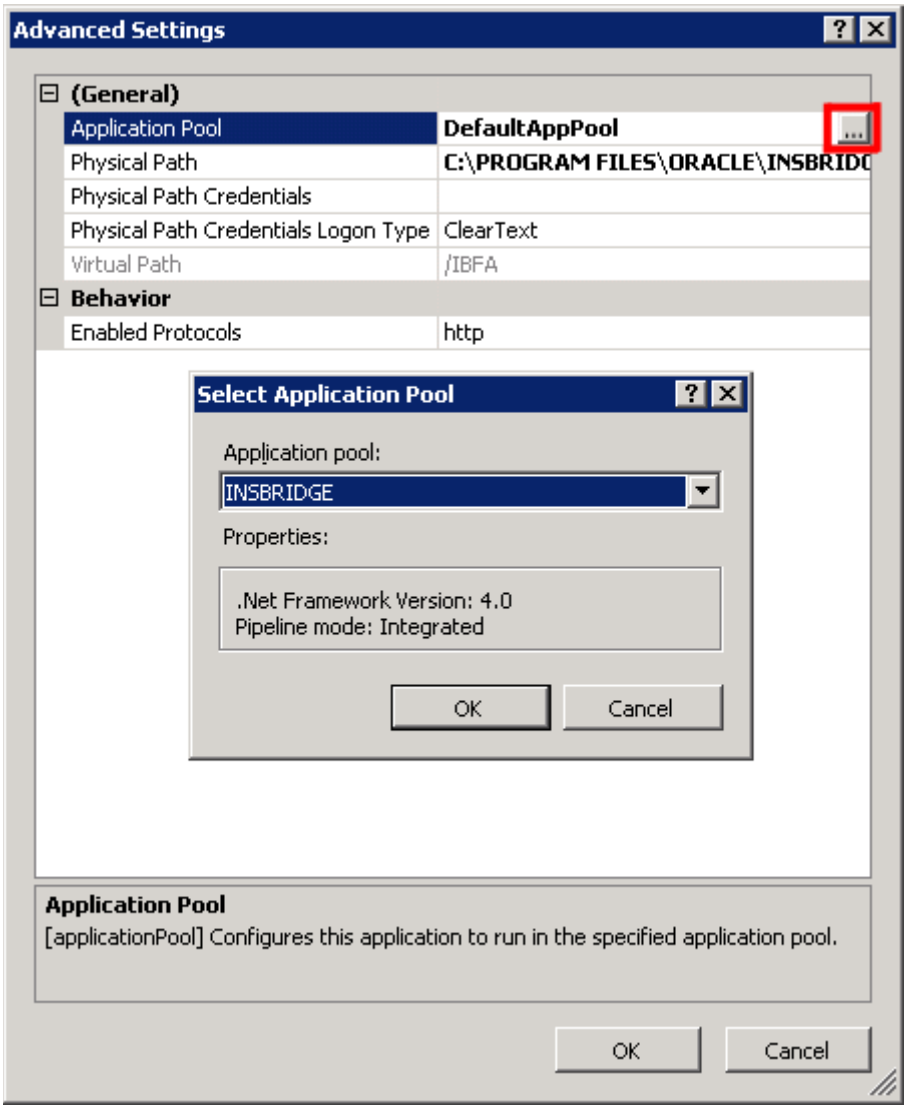


Figure 12 Adding Application to Application Pool

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, and Insbridge.
7. Return to the Insbridge application pool. Right click and select to view the applications.
8. Right click to View Applications. The three Insbridge applications should be listed.
9. Select the server level above the application pools and restart IIS. On the IIS screen, **Actions→Restart IIS**.

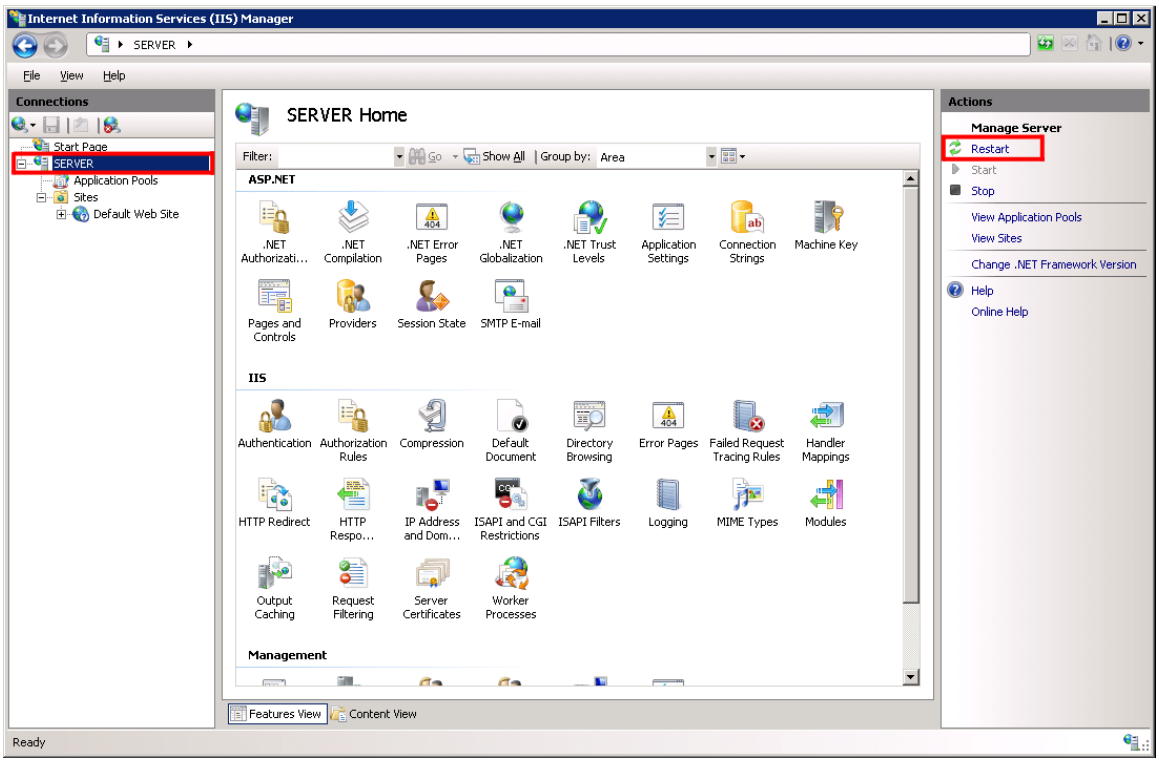


Figure 13 Restarting IIS

Application Pool Error

If you choose not to create an Insbridge Application Pool, the Insbridge application will use the default application pool. If you receive an error when accessing IBFA for the first time after a new install:

> CS0016: Could not write to output file 'c:\Windows\Microsoft.NET\Framework64\v4.0.50727\Temporary ASP.NET Files\ibfa\783d6267\bcca0b3e\App_global.asax.zf-kqiii.dll': 'Access is denied. '

You may have to create a separate Insbridge Application Pool.

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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