

Oracle Insurance

**Insbridge Enterprise
Rating**

**RateManager Client
Setup Document**

Release 5.6

November 2018

INTRODUCTION

RateManager is a component within the Oracle Insurance Insbridge Enterprise Rating (Insbridge) System that enables users to manage the product definition and modification process, including premium calculation and underwriting rules management.

Prior to using RateManager, users should verify that their computer has:

- Adobe Acrobat Reader v9.0 or higher. Adobe Acrobat reader is required to open certain reports from RateManager.

Two options are recommended for RateManager users:

- Adding the RateManager URL to either Intranet sites or Trusted sites.
- Adding the RateManager URL to the Compatibility View Settings to allow pop-ups to display properly.

ADOBE ACROBAT READER

Adobe Acrobat Reader is required to view select reports in RateManager.

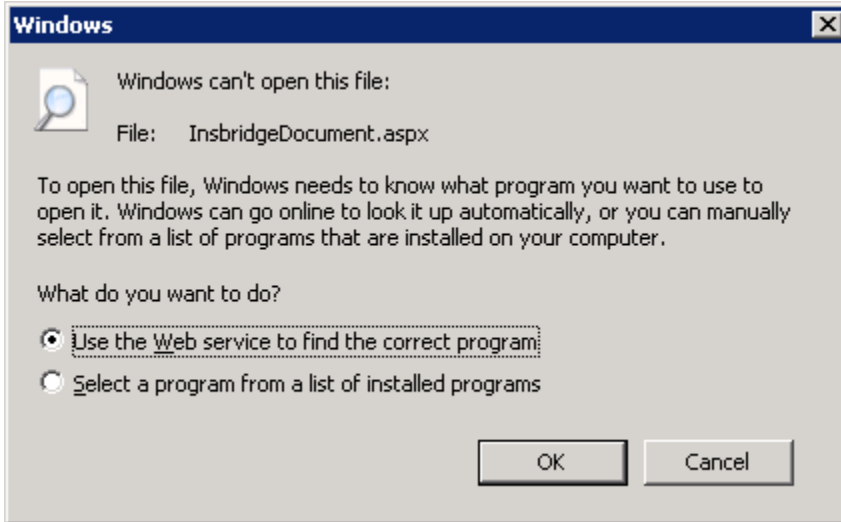
To verify Adobe Acrobat Reader, click Search Windows on your computers taskbar. Type in Adobe Acrobat Reader. If the program is not found, you must download and install. Acrobat Reader is available from <http://adobe.com/products/reader.html>.



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

No Adobe Acrobat Reader

If you do not have Adobe Acrobat Reader, a message is displayed when you attempt to open a report. The InsbridgeDocument.aspx file can be opened with Adobe Acrobat Reader only.



INTERNET OPTIONS

In many cases, RateManager displays and functions without a problem. However, there may be times when popups or elements on the page are not displaying correctly. This may be due to an older browser, newer browser or some other compatibility issue.

Many times these issues can be corrected by adding RateManager to you Intranet or Trusted site list and turning on compatibility mode.

Option 1: Adding RateManager to Intranet or Trusted Sites.

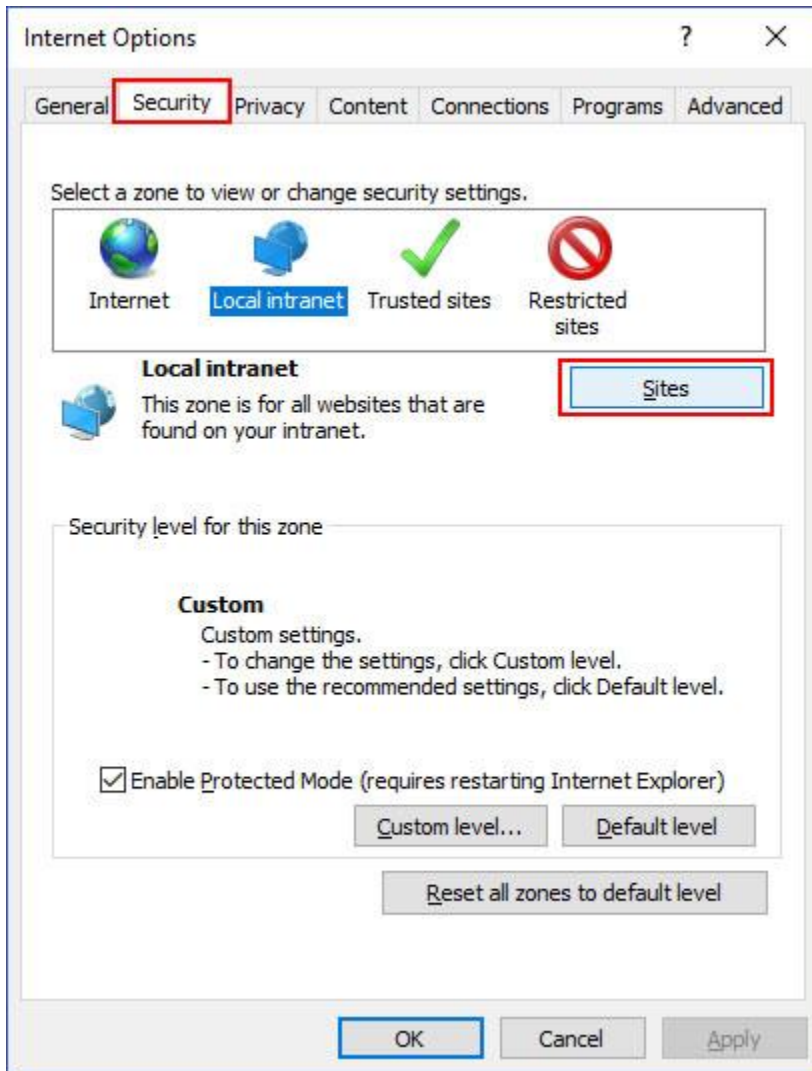
Option 2: Turning on Compatibility Mode for RateManager

Recommended Steps

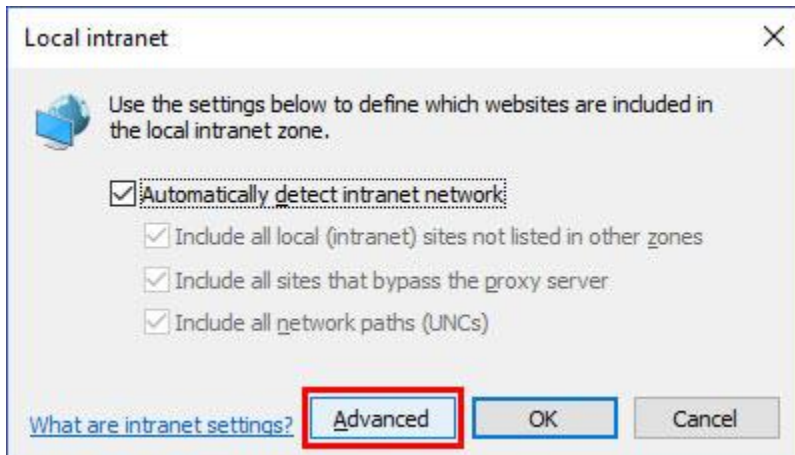
Add the RateManager URL to either Intranet sites or Trusted sites. If you receive a blank popup when importing or exporting table data, add the RateManager URL to your Intranet sites. Adding the RateManager URL to Trusted sites removes the URL address bars from the screen. This allows RateManager to utilize the entire screen. These steps can be performed at any time. You cannot add the RateManager URL to both Intranet and Trusted sites.

Adding RateManager to Intranet Sites

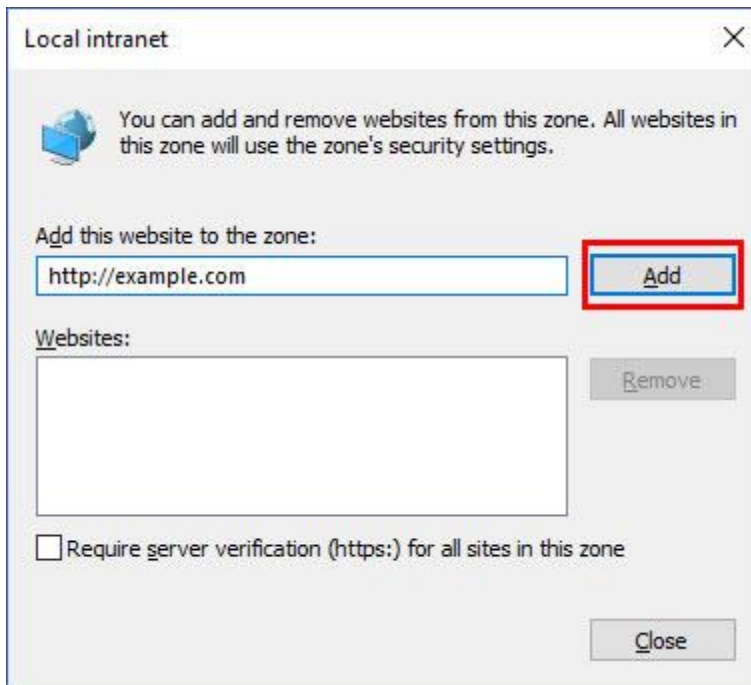
1. Open up IE. Please ensure that you do not have any other windows or tabs open.
2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
3. Select the Security tab.



- To add to Intranet, select Local Intranet and then click Sites.
- Click Advanced to view the local intranet sites.



- Enter the RateManager URL address. This adds RateManager to the List of Intranet sites.



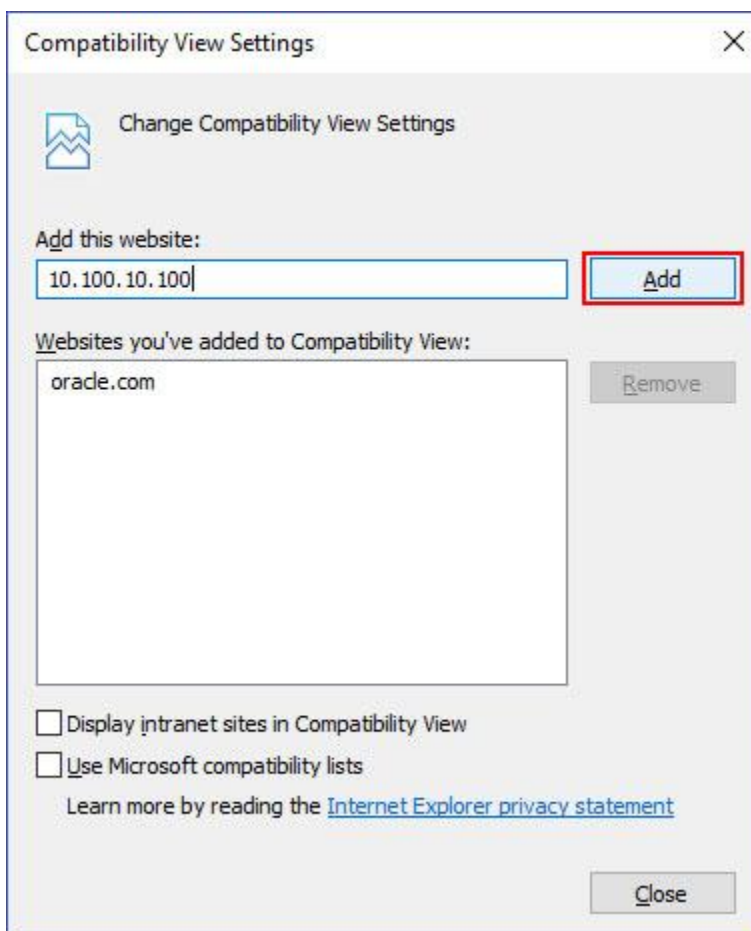
- Close the screen.
- Click OK to close.

NOTE: If the RateManager URL is not https, you will need to uncheck the https requirement. Close the screen.

Adding to Trusted Sites

Or you can add the RateManager URL to the Trusted sites listing. This may be helpful if you are accessing RateManager outside of the company network.

1. Open up IE. Please ensure that you do not have any other windows or tabs open.
2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
3. Select the Security tab.
4. Select Trusted sites.
5. Click Sites.



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

NOTE: If the RateManager URL is not https, you will need to uncheck the https requirement. Close the screen.

Removing the URL Bar on RateManager

If the URL is displaying in your screen and you would like to remove it, you may want to add your IBRU site as trusted site and then enable the option to allow script initiated windows.

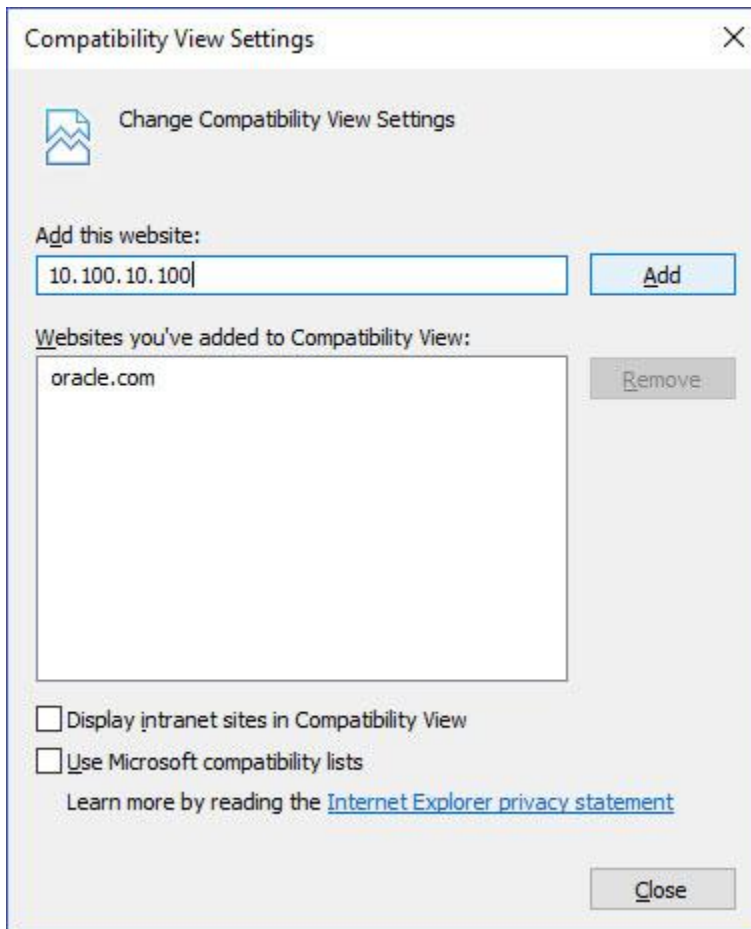
Please note that the RateManager URL cannot be both a Trusted site and an Intranet site.

1. Open up IE. Please ensure that you do not have any other windows or tabs open
2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
3. Select the Security tab
4. Select Trusted Sites.
5. Click Sites. A separate screen will be displayed.
6. Add your IBRU site as a trusted site. You may need to uncheck the "Require server verification (https:) for all sites in this zone" option.
7. Click Close.
8. Back on the Security tab, select Custom Level. This opens a separate screen.
9. Scroll down to the Miscellaneous section.
10. Enable the option to *Allow script-initiated windows without size or position constraints*.
11. Click OK to save your changes here and then Click OK to save all your changes.

Turning on Compatibility Mode for RateManager

It is recommended that the RateManager URL be added to the Compatibility View Settings. Adding RateManager to the Compatibility View Settings will help if popups or other screens fail to display properly.

1. Navigate to Tools->Compatibility View Settings.
2. Add the RateManager URL.

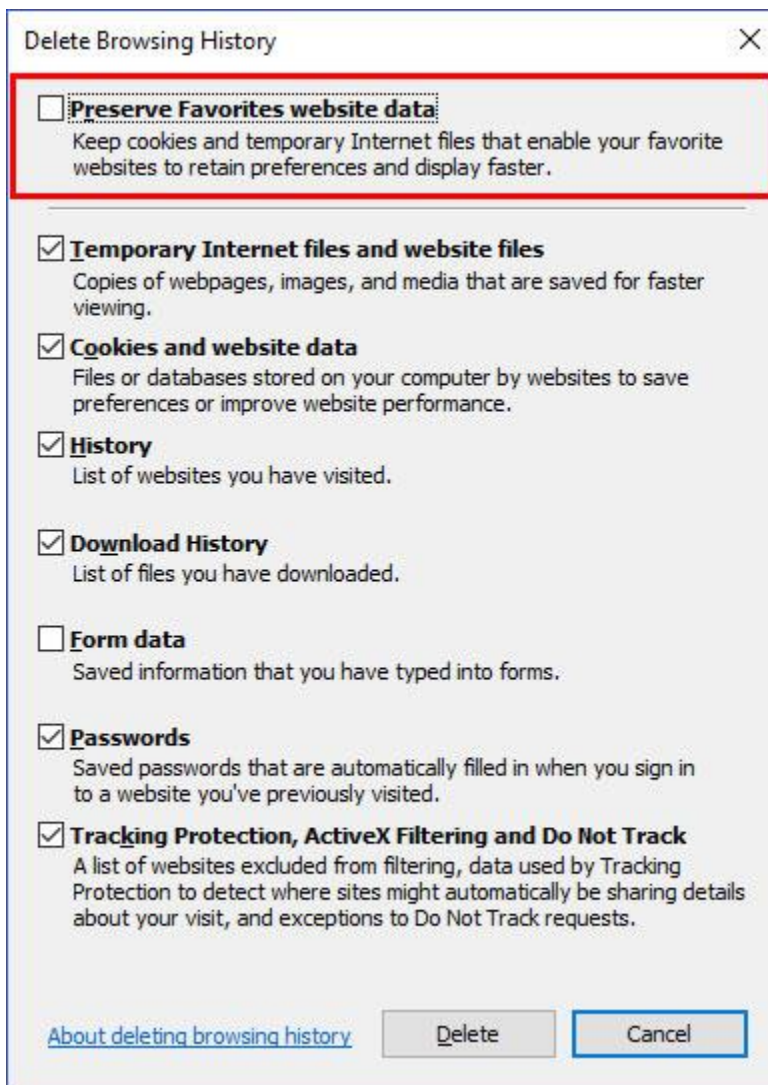


3. Click Close.

Upgrading from Previous RateManager Release

If you experience issues where RateManager is not functioning properly, temporary RateManager files being held in Internet Explorer may be the cause. This issue may be presented for users who are upgrading to Insbridge 5.x from earlier versions. In this case, it may be necessary to delete the temporary internet files in Internet Explorer. Removing temporary RateManager files will clear all cached files and assures that only the latest RateManager files are used.

1. Add the RateManager URL to the Favorite web address.
2. Delete browsing history and uncheck the option to Preserve Favorite website data.

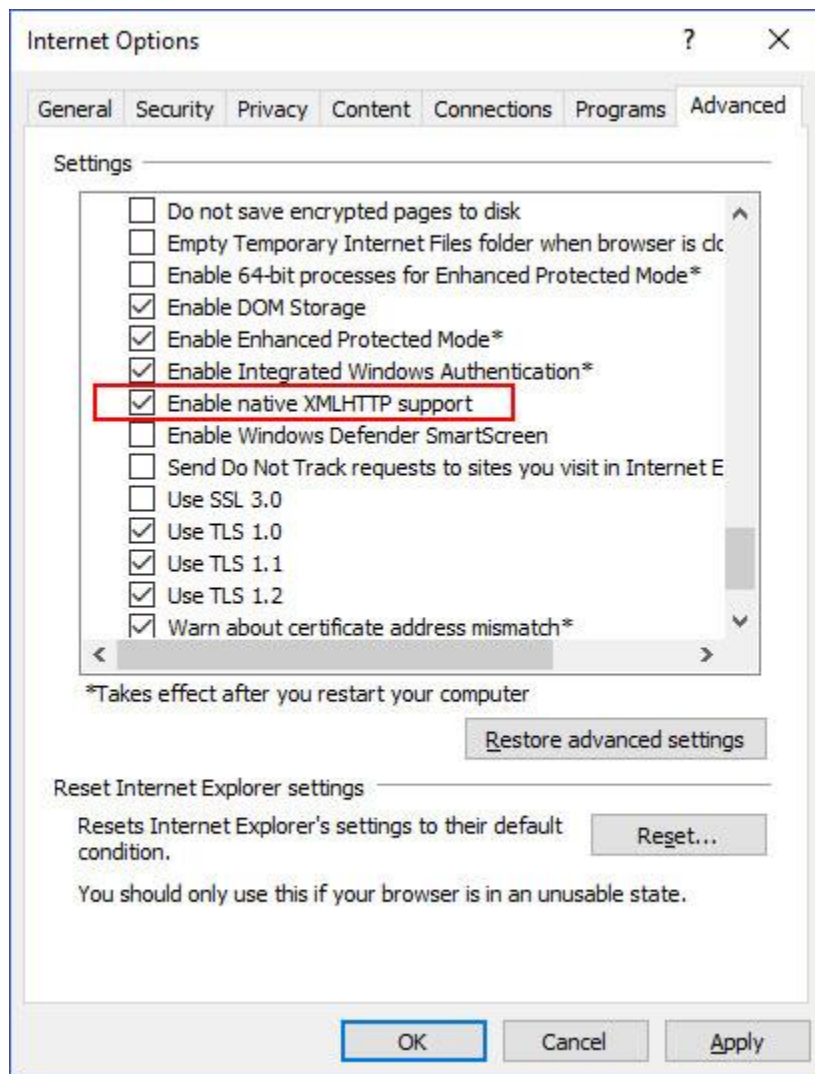


Make sure that "Preserve Favorites website data" is ***not*** selected when deleting the temp internet files. If the RateManager website has been added as a Favorite, then the temporary internet files for RM are not deleted.

RM IIS Login Error

If an error is presented when accessing RM, check the “Enable XMLHTTP” option on Advances security settings for Internet options may resolve the issue.

1. Open up IE. Please ensure that you do not have any other windows or tabs open
2. Browse to Tools-> Internet Options. This opens the Internet Options screen.
3. Select the Advanced tab
4. Scroll down to the Security section.
5. Check Enable native XMLHTTP support.



6. Click Apply and the OK.

Contacting Support

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

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

Address any additional inquiries to:

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