

**Oracle Insurance** 

# Insbridge Enterprise Rating Implementing a Shared Workfiles Location Guide

Release 5.6

November 2018



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Oracle Insurance Insbridge Enterprise Rating Implementing a Shared Workfiles Location Guide

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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.

If you need to create a shared workfiles for table management, please the SoftRater Batch Guide.

## 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**

Edition	Publication Number	Product Version	Publication Date	Comment
1 <sup>st</sup> Edition	P01-794-01	R 4.6.1	November 2012	Introduced for release 4.6.1
2 <sup>nd</sup> Edition	P01-794-02	R 4.7	September 2013	Update release
3 <sup>rd</sup> Edition	P01-794-03	R 4.8	August 2014	Update Release
4 <sup>th</sup> Edition	P01-794-04	R 4.9	December 2014	Update Release
5 <sup>th</sup> Edition	P01-794-05	R 5.0.1	August 2015	Update Release
6 <sup>th</sup> Edition	P01-794-06	R 5.1	December 2015	Update Release
7 <sup>th</sup> Edition	P01-794-07	R 5.2	July 2016	Update Release
8 <sup>th</sup> Edition	P01-794-08	R 5.4	January 2017	Update Release
9 <sup>th</sup> Edition	P01-794-09	R 5.5	September 2017	Update Release
10 <sup>th</sup> Edition	P01-794-10	R 5.6	August 2018	Update Release

New editions incorporate any updates issued since the previous edition.

# **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.

If the share is to be used by an IBSS instance for example, when importing or exporting table data. The application user from the machine where IBSS was deployed must also be added to the share. The share must be accessible by the IBSS user and on the same domain

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  $\rightarrow$  Administrative Tools  $\rightarrow$  select IIS Manager.
- 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.

📲 Internet Information Services (IIS) Manager					
🚱 💿 🔝 > SERVER > Application Pools					
Eile <u>V</u> iew <u>H</u> elp					
Connections		Actions			
Start Page         Start Page	Application Pools This page lets you view and manage the list of application pools on the server. Application pools are associated with worker processes, contain one or more applications, and provide isolation among different applications. Net Frame Managed Pipel Identity Applications ASP.NET v4.0 Classic Started v4.0 Classic ApplicationPooltden 0 Classic .NET AppPool Started v2.0 Classic ApplicationPooltden 2 CORACLE_FSGBU_INSERIDGE Started v4.0 Integrated ApplicationPooltden 2 CORACLE_FSGBU_INSERIDGE Started v4.0 Integrated Insbridge 3	Actions         Add Application Pool         Set Application Pool Tasks         > Start         Start         Start         Basic Settings         Recycle         Edit Application Pool         Basic Settings         Recycling         Advanced Settings         Rename         View Applications         View Applications         Place			
Ready	Features View	91:			

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.

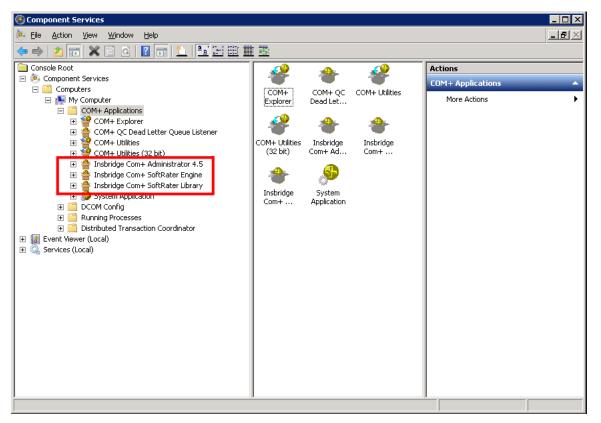


Figure 1 Component Services

There should be 3 Insbridge Com+ Applications libraries:

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

**NOTE:** <u>If any COM+ library is missing</u>, 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.

bridge Com+ 9 Advanced General	Í Security	Dump   Identity		Recycling	
This application Account		r the following a	account.		
		he current logg	ged on user		
	ork Service -	ilt-in service ac Built-in service	count. account with n	etwork.	
C Local		mplete access	io local machine	:	
	In	sbridge		<u>B</u> rowse	
<u>P</u> assword:	•	•••••	••••		
<u>C</u> onfirm pas	sword: 🕒	•••••	••••		
Server applications cannot run under system service accounts.					
Learn more about setting these properties.					
Learn more abol	at <u>setting the</u>	se propercies.			
		OK	Cancel	Apply	

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.

Q, Services					
File Action Vi	ew Help				
Services (Local	) 🔅 Services (Local)				
	Insbridge MessageQueue Service	Name 🔺	Insbridge MessageQueue Service Properties (Local Computer)		
	Start the service	Diagnostic Service Host	General Log On Recovery Dependencies		
		Distributed Link Tracking Client	Log on as:		
	Description: Insbridge Dispatcher and Processor	Coordinator	Local System account     Allow service to interact with desktop		
	service that incorporates the drainer and processor components of the Message Queuing (MSMO) architecture.	Cale Authentication Protocol	This account:		
		Contraction Discovery Provider Host	Password:		
		🤹 Group Policy Client 🤹 Health Key and Certificate Management	Confirm password:		
		Human Interface Device Access IIS Admin Service	Help me configure user account log on options,		
		🤹 IKE and AuthIP IPsec Keying Modules	You can enable or disable this service for the hardware profiles listed below:		
		🎑 Insbridge MessageQueue Service	Hardware Profile Service		
		Service TaskManager Service	Undocked Profile Enabled		
		Services Detection			
		Internet Connection Sharing (ICS)			
		Intersite Messaging			
		IP Helper			
		Q IPsec Policy Agent	Troubleshooting using hardware profiles. Enable Disable		
		Kerberos Key Distribution Center			
		KtmRm for Distributed Transaction Coordinator			
		🧠 Link-Layer Topology Discovery Mapper 🎑 McAfee Engine Service	OK Cancel Apply		
	Extended Standard				

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.
- 3. If the share is to be used by an IBSS instance for example, when importing or exporting table data. The application user from the machine where IBSS was deployed must also be added to the share. The share must be accessible by the IBSS user and on the same domain.

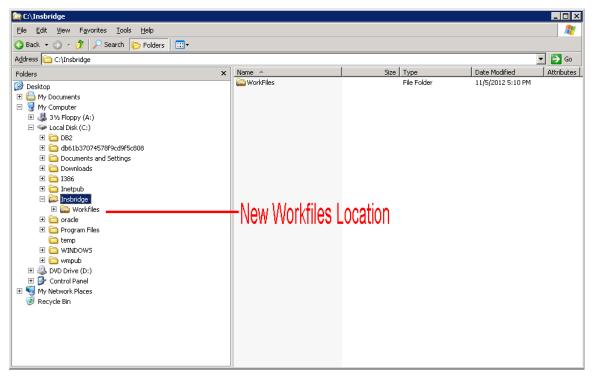


Figure 4 Creating a New Workfiles Location

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

ē			X
Preferences			_
⊡-Settings i-User i-Home Page i-Administrator i-System i-Migrate Workfiles	Impact Analysis Messaging Server: SoftRater Server : Table Management Messaging Server (JAVA Only): WorkFiles Share Folder Location: DB Backup Share Folder Location: Table Management Export Include Asterisk for Blank Cells: Table Management Import Excel Preview Rows: Use Insbridge Com+ Admin: Enforce Release Packaging: Batch Package Threads: Minimum Login User ID Length: User must change password: Show Override Date Mask:	C:\PROGRAM FILES\ORACLE\INSBRIDGE\FRAMEWORK\4.5.0\Ir Java V APPSERVER:7020 (Secure Channel) .NET localhost (Secure Channel) APPSERVER:7020 Test (Secure Channel) \\SHARE\Insbridge\Workfiles C:\Insbridge\Backup True V 5 V False V 1 3 90 (Days)	^
	Allow Data Type Change: Inactive Session Time Out:	True V 5.5 (hrs)	~
		Save 🔇 Close	

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 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.

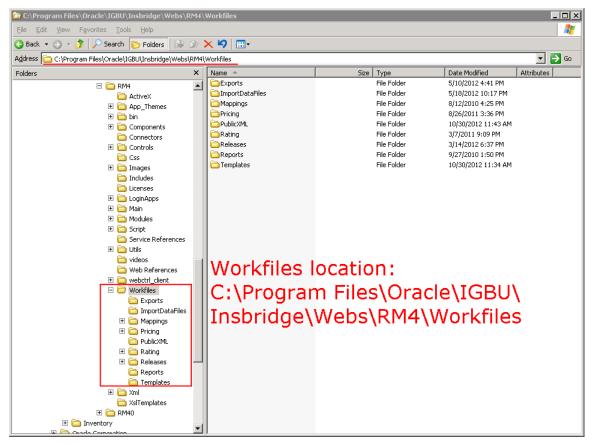


Figure 6 Location of WorkFiles

#### 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\RMxxx\WorkFiles

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

#### For Release 3.13:

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

#### For Release 4.0 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.

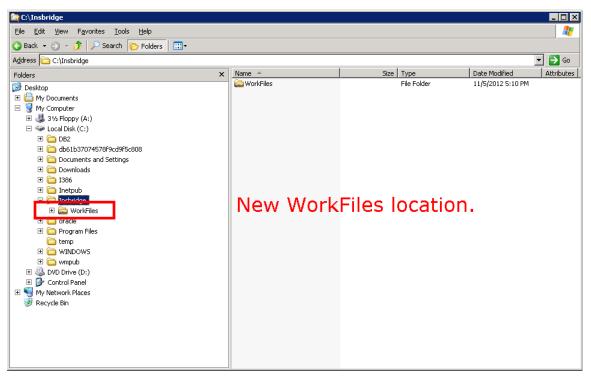


Figure 7 Copying Workfiles

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.

# **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  $\rightarrow$  Administrative Tools  $\rightarrow$  select IIS Manager.
- 2. Expand the Local Computer and select Application Pools. Right click and select Add Application Pool.

SERVER      Application Pools     Server     Application Pools     Servers     Application Pools     Servers     Application Pools     Servers     Application ore or more applications, and provide isolation among different applications.     Servers     Application ore or more applications, and provide isolation among different applications.     Servers     Application Pool     Servers     Add Application Pool     Servers     Add Application Pool     Servers     Add Application Pool     Servers     Add Application ore or more applications, and provide isolation among different applications.     Servers     Add Application Pool     Servers	) I 🕜 🕶
Connections       Application Pools         Start Page       This page lets you view and manage the list of application pools on the server. Application pools are associated with worker processes contain one or more applications, and provide isolation among different applications.       Add Application Pool       Set Application Pool	
Application Pools This page lets you view and manage the list of application pools on the server. Application pools are associated with worker processes contain one or more applications, and provide isolation among different applications. SERVER Add Application Pool Set Application Pool Set Application Pool Set Application Pool Refresh ASP.NET V4.0 ASP.NET V4.0 ASP.NET V4.0 Classic ApplicationPoolIden 0 Classic ApplicationPoolIden 0	
British Concessions       concessio	ults
Beild     Sites     Image: Constraint of the second	
Construction     Construction     Construction     Construction     Construction	
ASP.NET v4.0 Classic         Started         v4.0         Classic         ApplicationPoolIden         0           Classic         NET AppPool         Started         v2.0         Classic         ApplicationPoolIden         0	
Classic .NET AppPool Started v2.0 Classic ApplicationPoolIden 0	
GraditAppPool Started v2.0 Integrated ApplicationPoolIden 2	
Features View	
Ready	¶.

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.

Add Application Pool	? ×
<u>N</u> ame:	
Insbridge	
.NET Framework version:	
.NET Framework v4.0.30319	•
Managed pipeline mode:	
Integrated 💌	
Start application pool immediately	
OK Cano	el

Figure 9 Creating a New Application Pool

#### Step 2: Update Settings

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

E	NET Framework Version	
		¥4.0
P	Enable 32-Bit Applications	False
	Managed Pipeline Mode	Integrated
N	Vame	INSBRIDGE
C	Queue Length	1000
9	Start Automatically	True
3 0	EPU	
L	_imit	0
L	imit Action	NoAction
L	imit Interval (minutes)	5
F	Processor Affinity Enabled	False -
	Processor Affinity Mask	4294967295
F	rocossor rarancy rasis	
	Process Model	- <u>-</u>
3 F	•	Insbridge
	Process Model (dentity (dle Time-out (minutes)	
	Process Model Identity	Insbridge
I I L	Process Model (dentity (dle Time-out (minutes)	Insbridge 0
I I L	Process Model (dentity (dle Time-out (minutes) .oad User Profile	Insbridge 0 False
I I L F	Process Model Identity Idle Time-out (minutes) Load User Profile Maximum Worker Processes	Insbridge 0 False 1 True
I I L F	Process Model (dentity (dle Time-out (minutes) Load User Profile Maximum Worker Processes Ping Enabled	Insbridge 0 False 1 True
I I I F F	Process Model Identity Idle Time-out (minutes) Load User Profile Maximum Worker Processes Ping Enabled Ping Maximum Response Time (secon	Insbridge       0       False       1       True       90

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.

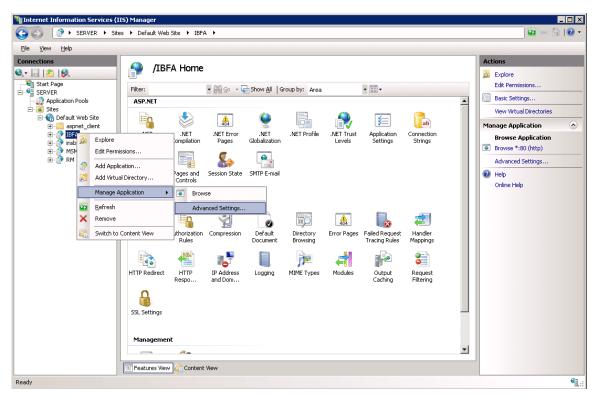


Figure 11 Associating the Virtual Directories with the Insbridge Application Pool

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

Adv	Advanced Settings ? 🗙				
F	_	(a ))			
		(General)	p-faulta-sp-st		
	ľ	Application Pool	DefaultAppPool		
		Physical Path	C:\PROGRAM FILES\ORACLE\INSBRIDO		
		Physical Path Credentials			
		Physical Path Credentials Logon Type			
	_	Virtual Path	/IBFA		
E	-	Behavior			
		Enabled Protocols	http		
		Application pool: INSBRIDGE Properties: .Net Framework Vers Pipeline mode: Integr			
	<b>Application Pool</b> [applicationPool] Configures this application to run in the specified application pool.				
			OK Cancel		

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.

Internet Information Services (II)	5) Manager									× • • • • • • • • • • • • • • • • • • •
File View Help										
Connections           Q. • Lat.         200           Q. • Lat.         201           Q	SER	VER Hon		Show All   Gr	oup by: Area		• ••• •			Actions Manage Server
	ASP.NET								-	Start Stop
⊟- 🗟 Sites ④ 🌚 Default Web Site	.NET Authorizati Pages and Controls	.NET Compilation	.NET Error Pages Session State	.NET Globalization	.NET Trust Levels	Application Settings	Connection Strings	Machine Key		View Application Pools View Stes Change .NET Framework Version
	115									
	Authentication	Authorization Rules	2 Compression	Default Document	Directory Browsing	A04 Error Pages	Failed Request Tracing Rules	Handler Mappings		
	HTTP Redirect	HTTP Respo	IP Address and Dom	ISAPI and CGI Restrictions	لی ISAPI Filters	Logging	MIME Types	Modules		
	Output Caching	Sequest Filtering	Server Certificates	Worker Processes						
	Managemer	nt 600	en.	đa,					T	
	Features View	/ 💦 Content	View							
Ready										•1.:

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.

### Support

# **CONTACTING SUPPORT**

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

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

#### Address any additional inquiries to:

Oracle Corporation World Headquarters 500 Oracle Parkway Redwood Shores, CA 94065 U.S.A.

Worldwide Inquiries: Phone: +1.650.506.7000 Fax: +1.650.506.7200 oracle.com

#### A

Application Pool	
ID	
Updating	17

### С

СОМ+	Library	 	 	1	1
COM+	Library	 	 	1	•

### E

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### Ι

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COM+ Library	.11

### R

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IBFA	 	 	 . 11

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IBFA	11
Update	
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Application Pool	17

#### V

Validating		
COM+ Library	/	10

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