

Oracle Insurance

Insbridge Enterprise Rating Upgrade Guide

Release 5.6.1

July 2020

Copyright © 2005, 2020, Oracle and/or its affiliates. All rights reserved.

Oracle Insurance Insbridge Enterprise Rating Insbridge Upgrade Guide

Release 5.6.1

July 2020

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

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

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

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

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

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

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

CONTENTS

| | |
|--|-----------|
| PREFACE | 1 |
| AUDIENCE | 1 |
| TYPES OF INSTALLATION | 1 |
| RateManager Installation | 1 |
| SoftRater Installation | 1 |
| Upgrading a Current Installation..... | 1 |
| <i>Definitions.....</i> | <i>1</i> |
| <i>Related Documents</i> | <i>2</i> |
| <i>Manual History.....</i> | <i>2</i> |
| SYSTEM UPGRADE REQUIREMENTS | 3 |
| INSBRIDGE 5.6.1 CONTENT | 3 |
| The Insbridge-Windows folder contents:..... | 3 |
| The Insbridge-TomEE-eng folder contents: | 3 |
| Internet Explorer | 3 |
| ADMINISTRATIVE USERACCOUNTS | 4 |
| <i>File Permissions.....</i> | <i>4</i> |
| <i>Extended Permission Required by the Insbridge User</i> | <i>4</i> |
| <i>Insbridge User Password</i> | <i>4</i> |
| <i>Installer Permissions.....</i> | <i>4</i> |
| <i>Application Server Permissions.....</i> | <i>5</i> |
| DATABASE USER ROLES AND PERMISSIONS..... | 5 |
| Recommended RateManager Permissions: | 5 |
| <i>IB_CLIENT and IBRM Database File Location</i> | <i>5</i> |
| Recommended SoftRater Permissions:..... | 5 |
| <i>SoftRater Database File Location</i> | <i>5</i> |
| <i>Creating Tables</i> | <i>7</i> |
| <i>Oracle.....</i> | <i>7</i> |
| JDBC Driver Class | 7 |
| Supported Versions – 11g, 12c, 19c | 7 |
| User Account Requirements | 7 |
| <i>IBM DB2</i> | <i>8</i> |
| JDBC Driver Class | 8 |
| Supported Version – 9.7 | 8 |
| Configuration Settings | 8 |
| Required | 8 |
| Recommended | 8 |
| <i>Steps to Upgrade RateManager/IBFA</i> | <i>9</i> |
| Upgrading from Release 4.8.X or previous to release 5.6.1 requires: | 9 |
| Additional Step to Upgrade RateManager/IBFA:..... | 9 |
| Upgrading from Release 4.9.X to release 5.6.1 requires: | 10 |
| <i>Steps to Upgrade SoftRater for Windows from a Previous Release.....</i> | <i>11</i> |
| Upgrading from Release 4.8.X or previous to release 5.6.1 requires | 11 |
| Upgrading from Release 4.9.X to release 5.6.1 requires | 11 |
| UPDATING AN INSBRIDGE APPLICATION | 12 |
| Upgrading from Release 4.8.X or previous to release 5.6.1 requires: | 12 |
| Upgrading from Release 4.9.X to release 5.6.1 requires: | 12 |
| STEP 1—VERIFY OR INSTALL .NET 4.5.2 | 13 |
| Troubleshooting..... | 14 |
| STEP 2—REBOOT SYSTEM | 15 |

| | |
|---|----|
| Failure to Shut Down Com + Services:..... | 15 |
| Failure to Shut Down Insbridge Message Service:..... | 15 |
| STEP 3—RUNNING THE INSBRIDGE APPLICATION..... | 17 |
| STEP 4—CONFIGURING INSBRIDGE FRAMEWORK ADMINISTRATOR..... | 22 |
| <i>USING PREVIOUS CONFIG.XML FILES</i> | 22 |
| <i>Step 1: Copy the Previous Insbridge.XML File</i> | 22 |
| File Location:..... | 22 |
| <i>Step 2: Paste the Insbridge.XML File</i> | 23 |
| <i>Logging in to IBFA</i> | 25 |
| Troubleshooting..... | 26 |
| <i>Updating IBFA Security</i> | 27 |
| <i>Entering Company Information</i> | 28 |
| Step 2: Adding a Global Database Connection:..... | 31 |
| Step 3: Adding a Security Database Connection:..... | 32 |
| Step 4: Adding an rm Database Connection:..... | 33 |
| Creating Logical Environments:..... | 34 |
| Step 5: Creating a RateManager Environment:..... | 35 |
| <i>Optional Setting: Threads</i> | 38 |
| <i>OBI Security</i> | 40 |
| <i>Updating OBI Publisher Password</i> | 41 |
| To Start in IBFA:..... | 42 |
| <i>Updating Databases in RateManager</i> | 43 |
| To Change Settings..... | 46 |
| <i>System Setting Options</i> | 47 |
| Insbridge Configuration File Path..... | 47 |
| SoftRater Server..... | 47 |
| Table Management Messaging Server (JAVA ONLY):..... | 47 |
| Work Files Share Folder Location..... | 47 |
| DB Backup Share Folder Location..... | 48 |
| Table Management Export Include Asterisk for Wildcard..... | 48 |
| Table Management Import Excel Preview Rows..... | 48 |
| Use Insbridge Com + Admin..... | 48 |
| Enforce Release Packaging..... | 48 |
| Batch Package Threads..... | 48 |
| User must change password..... | 49 |
| Show Override Date Mask..... | 49 |
| Allow Data Type Change..... | 49 |
| Inactive Session Time Out..... | 49 |
| Batch Results with New Line..... | 49 |
| Online Help Server..... | 49 |
| My Recent List..... | 50 |
| Default Proxy Script Location..... | 50 |
| Change Control..... | 50 |
| Maximum Amount of Simultaneously Opened Tabs..... | 50 |
| Debug Report Format..... | 50 |
| Default Naming Standard..... | 50 |
| Enable Worksheet for Test Case Editor..... | 50 |
| Product Configuration Server..... | 50 |
| Enforce Product Configuration..... | 51 |
| Reporting Threads..... | 51 |
| Global Versions Report Threads..... | 51 |
| To Update Rights..... | 52 |
| <i>Upgrading from Previous RateManager Release</i> | 54 |
| OPTIONAL STEPS..... | 55 |
| <i>Migrating Files</i> | 55 |
| <i>MIGRATE WORK FILES</i> | 55 |
| STEP 1—MIGRATE WORK FILES..... | 56 |
| MIGRATING FILES IS A TWO-STEP PROCESS..... | 57 |
| <i>Step 1: Locate the previous workfiles to be migrated.</i> | 57 |

| | |
|---|----|
| For Release 3.12 and earlier: | 57 |
| For Release 3.13: | 57 |
| For Release 4.0 To 4.8: | 57 |
| For Release 4.9: | 57 |
| Step 2: Place copies in the new workfiles location | 57 |
| New File Location | 57 |
| Manual Migration | 57 |
| Verifying the File Migration in the Server | 57 |
| Verifying Migrated Files in RateManager | 58 |
| UPDATE PORTAL URL | 59 |
| To Update | 59 |
| Step 1: Locate previous portal settings. | 60 |
| For Release 3.12 and earlier | 60 |
| For Release 3.13 to 4.8.X | 60 |
| For Release 4.9.X | 60 |
| Step 2: Copy from previous portal to new portal. | 60 |
| New File Location: | 60 |
| Step 3: Update URL to insbridge to reflect the application name of insbridge. | 60 |
| Portal Access | 60 |
| UPGRADING TO A NEW MACHINE | 61 |
| STEP 1: INSTALL RATEMANAGER/IBFA | 61 |
| STEP 2: EXPORT THE INSBRIDGE REGISTRY KEY | 61 |
| STEP 3: IMPORTING THE REGISTRY KEY | 61 |
| Step 4: Copy the Previous Insbridge.XML File | 61 |
| File Location | 62 |
| For Release 3.12 and earlier: | 62 |
| For Release 3.13 to 4.8.X: | 62 |
| For Release 4.9.X: | 62 |
| Step 5: Paste the Insbridge.XML File | 62 |
| Step 6: Complete the RateManager/IBFA Installation | 63 |
| Step 7: Run Database Clients – Optional | 63 |
| Step 8: Manually Migrate Workfiles | 64 |
| Step 9: Update Portal Settings | 64 |
| Step 10: Send Notice to RM Users to Clear IE | 64 |
| Display Issues When Upgrading from Previous RateManager Release | 64 |
| IMPORTING REGISTRY KEY AFTER INSTALLATION | 65 |
| Step 1: Export the Insbridge Registry Key | 65 |
| Step 2: Importing the Registry Key | 65 |
| Step 3: Re-enter Username and Password | 65 |
| Upgrading the Database Machine | 65 |
| MANUAL UPDATES TO THE INSBRIDGE DATABASES | 66 |
| UPGRADING SOFTRATER FOR JAVA | 69 |
| Upgrading from Release 3.13.4 or previous to release 5.6.1 requires: | 69 |
| Upgrading from release 3.13.5 to release 4.6.X to release 5.6.1 requires: | 69 |
| Upgrading from release 4.7.X to release 5.6.1 requires: | 69 |
| Upgrading from release 5.0.1 to release 5.6.1 requires: | 69 |
| SOFTRATER UPDATE NOTICE | 70 |
| SoftRater Machine Update | 70 |
| Upgrading from Release 3.13.4 or previous to release 5.6.1 and moving to a new machine: | 70 |
| SOFTRATER UPDATES | 71 |
| SoftRater Update Notice | 71 |
| SOAP Notice | 71 |
| SOFTRATER FOR APACHE TOME | 72 |

| | |
|--|-----------|
| UPGRADING TO 5.6.1..... | 72 |
| SOFRATER UPDATE NOTICE | 73 |
| DATABASE USER ROLES AND PERMISSIONS | 73 |
| Recommended SoftRater Permissions:..... | 73 |
| <i>Updating a SoftRater Database</i> | <i>73</i> |
| <i>Oracle.....</i> | <i>76</i> |
| JDBC Driver Class | 76 |
| Supported Versions – 11g, 12c, 19c | 76 |
| User Account Requirements..... | 76 |
| Configuration Settings | 76 |
| <i>UNIX Environment</i> | <i>76</i> |
| <i>Windows Environment.....</i> | <i>76</i> |
| APPENDIX A..... | 77 |
| CREATING AN APPLICATION POOL | 77 |
| <i>Step 1: Create or Verify an Insbridge Application Pool</i> | <i>77</i> |
| <i>Step 2: Update Settings.....</i> | <i>78</i> |
| <i>Step 3: Associate the web applications with the Insbridge Application Pool.....</i> | <i>79</i> |
| Application Pool Error | 81 |
| APPENDIX B..... | 82 |
| TROUBLESHOOTING | 82 |
| VERIFYING THE INSBRIDGE APPLICATION POOL | 82 |
| <i>VERIFYING THE COMPONENT SERVICES</i> | <i>83</i> |
| SUPPORT | 85 |
| CONTACTING SUPPORT | 85 |

PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating Insbridge Upgrade 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. The purpose of this guide is to assist with the upgrading of the Insbridge Enterprise Rating System.

There are different types of upgrades available to the 5.6.1 release of the Insbridge system:

- RateManager/IBFA
- SoftRater for Windows
- SoftRater for Apache TomEE

This document focuses on upgrading RateManager/IBFA and SoftRater for Windows. Also included are the steps for upgrading SoftRater for Apache TomEE.

Note: *You may have done many of these steps as part of your 5.6.0 installation, you can skip them if not needed.*

AUDIENCE

This guide is intended for system administrators, installers, database administrators and others tasked with installing and configuring the Insbridge system and associated databases.

TYPES OF INSTALLATION

There are various types of installations:

RateManager Installation

- **RateManager for Windows** – Installs RateManager and the Insbridge Framework Administrator (IBFA) in a Windows environment and utilizes IBFA for local rating. This Windows only environment uses a SQL Server database.

SoftRater Installation

- **SoftRater for Java Installation** – Deploys Insbridge SoftRater Server (IBSS) to Apache TomEE.
- **SoftRater for Windows Node** – This installation is for existing environments that want to add a SoftRater for Windows node to an environment. This is for a Windows only environment using a SQL Server database.

Upgrading a Current Installation

- **Upgrade** – Upgrades existing customers from their current version of Insbridge up to version 5.6.1.

This guide describes upgrading an existing environment.

Definitions

Some commonly used terms when installing or using the Oracle Insurance Insbridge Enterprise Rating system:

- **IBER:** Insbridge Enterprise Rating System. Most often referred to as Insbridge. This is the entire system.
- **IBFA:** Insbridge Framework Administrator. IBFA is an administrative tool used to configure Insbridge applications and setup RateManager database connections. IBFA will be located on a Windows Server machine. IBFA/SR-WIN is an Insbridge Framework Administrator/SoftRater for Windows.
- **IBSS:** Insbridge SoftRater Server. IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within Insbridge that executes the rules, rating and underwriting instructions as defined by the user in RateManager. IBSS is usually located on a Java machine. IBSS/SR-JAVA is an Insbridge SoftRater Server/SoftRater for Java.
- **SoftRater Node:** A SoftRater node is either an IBFA (without RateManager) or IBSS instance on

a physical environment.

- **RM:** RateManager. RateManager is a component within Insbridge that enables users to manage the product definition and modification process, including rating and underwriting logic.
- **SR:** SoftRater. The engine that executes the rating, rules and underwriting instructions defined within RateManager. The rating environment for runtime execution and processing of business content. SoftRater can be further defined by the operating system where it has been loaded.
- **SR-WIN:** SoftRater for Windows. This is also another name for IBFA.
- **SR-JAVA:** SoftRater for Java. This is also another name for IBSS.
- **SRP:** SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.
- **VFS:** Virtual File Servers. Virtual file server management allows you to access environments that are located on other machines in different locations where packages can be downloaded.
- **Package Location:** A pointer to a location where SoftRater Packages (SRP's) are stored.
- **Physical Environment:** A physical environment is generally referred to as a physical machine.
- **Authoring Environment:** The physical machine where RateManager is installed.
- **Rating Environment:** The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
- **Logical Environment:** An environment created for a subscriber in IBFA. It defines package location, engine location and database location in addition to several other supporting data items. This environment is used for rating and/or SRP management. Each database connection will have a logical environment.

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:
<https://docs.oracle.com/en/industries/insurance/index.html>

Manual History

New editions incorporate any updates issued since the previous edition.

| Edition | Publication Number | Product Version | Publication Date | Comment |
|--------------------------|--------------------|-----------------|------------------|-----------------|
| 1 st Edition | P01-788-01 | | May 2011 | Initial Release |
| 2 nd Edition | P01-788-02 | R 4.5.1 | September 2011 | Update |
| 3 rd Edition | P01-788-03 | R 4.6 | May 2012 | Update |
| 4 th Edition | P01-788-04 | R 4.6.1 | November 2012 | Update |
| 5 th Edition | P01-788-05 | R 4.7.0 | September 2013 | Update |
| 6 th Edition | P01-788-06 | R 4.7.1 | November 2013 | Update |
| 7 th Edition | P01-788-07 | R 4.8 | August 2014 | Update |
| 8 th Edition | P01-788-08 | R 4.9 | December 2014 | Update |
| 9 th Edition | P01-788-09 | R 5.0 | June 2015 | Update |
| 10 th Edition | P01-788-10 | R 5.0.1 | August 2015 | Update |
| 11 th Edition | P01-788-11 | R 5.1 | December 2015 | Update |
| 12 th Edition | P01-788-12 | R 5.2 | July 2016 | Update |
| 13 th Edition | P01-788-13 | R 5.3 | October 2016 | Update |
| 14 th Edition | P01-788-14 | R 5.4 | January 2017 | Update |
| 15 th Edition | P01-788-15 | R 5.5 | September 2017 | Update |
| 16 th Edition | P01-788-16 | R 5.6 | August 2018 | Update |
| 17 th Edition | N/A | R 5.6.1 | July 2020 | Update |

SYSTEM UPGRADE REQUIREMENTS

Prior to upgrading an Insbridge system, please have the following ready:

- The Insbridge User Account information.
- The location of the current Insbridge installation.
- The Insbridge User has administrative rights or proper permissions to run an installation and start the Insbridge Message Service and the Insbridge Task Manager Service.
- You must run as Administrator for any upgrade.
- Administrator User name and password for RateManager.
OR
- Access to the Insbridge databases. Updates are run against the IBRM, the IB_CLIENT database and the IBSR SoftRater database.
- Subscriber, database, and environment information.

Important: You must be on Insbridge release 5.6.0 before you attempt an upgrade to 5.6.1

Insbridge 5.6.1 content

Prior to installation, please make sure the source machine(s) where Insbridge will be loaded has an unzip utility. An unzip utility for most platforms is available on the Oracle Software Delivery Cloud download page.

Documentation is in PDF format. Prior to installation, ensure the source machine(s) where Insbridge documentation will be loaded has a PDF reader.

The installation downloads contains:

- **Insbridge-Windows** – Required for all RateManager installations. The Insbridge installation is for a 64-bit system.
- **Insbridge-TomEE-eng** – Required if you are using Apache TomEE
- **Documentation:** It is recommended that you download the documentation. Installation guides are located here.

The Insbridge-Windows folder contents:

- **Databases**
 - Oracle
- **SoftRater – IBSR**
 - Batch
 - IBSS561IA20.1.zip

Oracle Insurance - Insbridge Enterprise Rating.exe

The Insbridge-TomEE-eng folder contents:

- IBSS.ear
- Docker
 - Docker.dat

SoftRater can be installed any time after the Insbridge Framework Administrator and RateManager have been installed. SoftRater must be installed prior to any users creating packages. All the folders and files may not be needed, depending upon the installation.

Internet Explorer

IBSS and IBFA are accessed via web browser. Verify that you are using Internet Explorer 11.

ADMINISTRATIVE USER ACCOUNTS

No administrative account is created when Insbridge is installed. An administrative user account must be created on the server where the Insbridge system is going to be installed. This required account is the Insbridge Local User Account.

The Insbridge Local User needs to be a member of the User group and requires certain privileges in order to fully control the entire Insbridge environment. For ease of installation and if the server is dedicated to the Insbridge Enterprise Rating System, this user can be added to the local machine Administrators group.

File Permissions

The Insbridge User requires read/write permissions on:

- The Windows Temp Folder. This is necessary for MSMQ.
- The Insbridge Application Pool Identity
- The Insbridge Folder

The Insbridge user must also be given **full control** over the following registry key:

- HKEY_LOCAL_MACHINE/SOFTWARE/Insbridge

It is recommended that the databases be on separate machines from the applications due to performance and security issues. The Insbridge applications and databases can be tenants in an already existing setup. IBFA uses port 80 by default. Please check with your system administrator for port conflicts with the existing setup. The ports used by SoftRater for Java can be changed from the default to a fixed port if needed.

Extended Permission Required by the Insbridge User

In order to start the Insbridge services from IBFA, the Insbridge user must be given full access to both the Insbridge Message Service and the Insbridge Task Manager Service. If the Insbridge user account will not have full administrative permissions on the server where the Insbridge Framework is installed, then certain operations from IBFA will not be available. A system administrator may be required to start the Insbridge services from the server.

Insbridge User Password

The password can be set to any password that meets your company standards. The Insbridge administrator must make note of the password for future configuration.

For ease of maintenance, the Insbridge user should not have to change the password and the password should never expire.

The installation automatically applies the Insbridge user name and password to the necessary libraries, virtual directories and, if used, Internet Proxy settings in IBFA. If you change the Insbridge user password, you will have to change the password in all three of the Insbridge Com+ libraries, all three of the Insbridge virtual directories and, if you are using it, the Internet Proxy settings in IBFA.

NOTE: Please note that if your company requires passwords to be re-set, you will have to make changes to the COM+ Application libraries, virtual directories and if you are using it, the Internet Proxy settings in IBFA after you change your password. You also may re-install the application. This recreates the COM+ applications, virtual directories and IBFA instance with the updated Insbridge user password. Be aware that re-installing the application may also reset security settings in IBFA.

Installer Permissions

The installation program requires that the installer have administrator rights on the machine where the install is occurring. The install must be run as administrator.

NOTE: *If the Installer has permissions, an Insbridge User account can be created from within the install. If you create an Insbridge user from the install, you may not be able to set the permissions you need. Please be sure to verify the proper permissions are in place before continuing.*

Application Server Permissions

The SoftRater Server (IBSS) application servers Apache TomEE require read/write permissions on the `Insbridge.net.softraterconfig.xml` that resides in the shared directory for all nodes. Also required is full control on the SoftRater node instance directory creates the config files and log files for that JVM.

DATABASE USER ROLES AND PERMISSIONS

If a more granular approach is required for management of security of the Insbridge databases, then the following guidelines can be used to set permissions.

NOTE: *These are only guidelines. If not properly configured, certain processes within the Insbridge Enterprise Rating System will fail. An experienced database administrator's expertise is highly recommended before making any security changes.*

Recommended RateManager Permissions:

It is recommended that the IBRM and IB_CLIENT database user have:

- **A database owner (db_owner) role.** db_owner access is needed to execute the Insbridge stored procedures and have full access to the Insbridge schema.
- **Disk Admin permissions** are also recommended in order to create backups within RateManager.

For the IBRM and IB_CLIENT databases, if db_owner permissions are not possible, the database will need to be updated manually. If disk admin permissions are not allowed, backups will have to be done outside of RateManager.

IB_CLIENT and IBRM Database File Location

UPGRADING IB_CLIENT and IBRM – The preferred method of updating the IBRM and IB_CLIENT databases is to run them through RateManager. If the RM administrator has DB User privileges and is the DB Owner of the database as well as the disk administrator, database updates can be done on the Tools→Database→Updates tab. If these privileges are not in place, an error message is displayed.

IB_CLIENT and IBRM databases can be updated manually by downloading the scripts from RateManager Tools→Database→Updates tab and running them directly in SQL Server. Scripts must be run in sequential order. You must have SQL SERVER permissions to run update scripts. You must have RateManager admin permissions to access the Tools→Database→Updates tab.

If needed, new IB_CLIENT, and IBRM files are located in the download file available from Oracle Software Delivery Cloud. You might have received this as part of the 5.6.0 distribution.

Recommended SoftRater Permissions:

The recommended permissions are required for new tables to be created in the SoftRater (IBSR) database dynamically when an SRP (SoftRater Package) is loaded to the SoftRater system. If the recommended permissions are not possible, manual steps will need to be performed that will allow for packages to be loaded.

SoftRater utilize Oracle database.

- **Insbridge SoftRater Oracle Database.**
It is recommended that the Insbridge user be granted, as defaults, the “CONNECT” and “RESOURCE” Roles.

SoftRater Database File Location

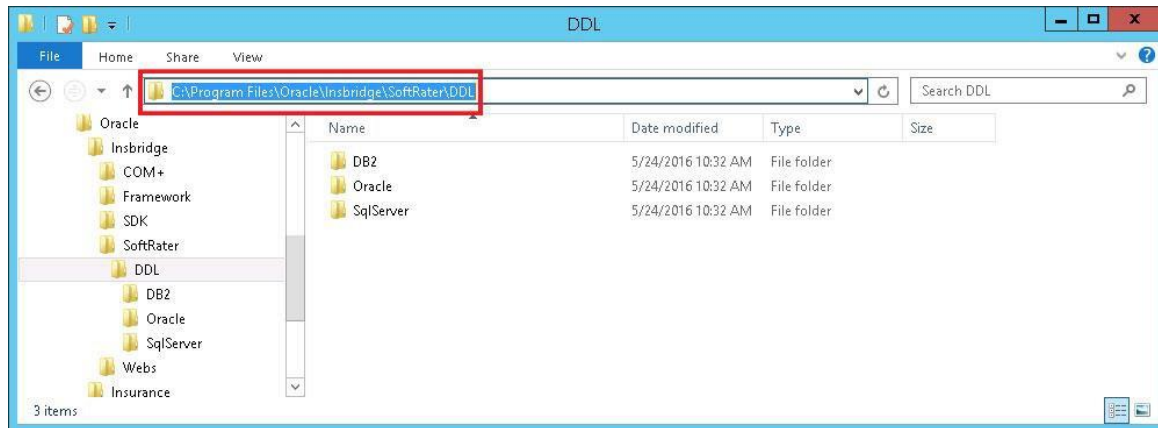
In the event that db_owner permissions are not possible, scripts will have to be run to create the necessary tables. Tables are required for each Project and or Product. If the tables are not created, the packages cannot be loaded.

NEW IBSR – New Oracle and DB2 DDLS are located in the SoftRater file on the Insbridge installation

server ONLY.

DDL scripts can be found on the server where Insbridge was installed in the ...\\Oracle\\Insbridge\\SoftRater folder.

For example: C:\\Program Files\\Oracle\\Insbridge\\SoftRater\\DDL



For SQL Server, new backup files are included in the Insbridge download in the Windows folder under databases. If the IBSR backup files cannot be used and DDL scripts are needed, SQL Server DDL scripts can be found on the server where Insbridge was installed in the ...\\Oracle\\Insbridge\\SoftRater folder.

UPGRADING IBSR – An Upgrade folder is located inside each of the database types with one upgrade script and Instructions for running the update. When upgrading from a release prior to release 5.0. users must create new and re-load packages.

Only one update script is available per database type. This script covers all updates from the last schema change. This reduces the number of potential upgrade scripts users must run and assures that the scripts are run in the correct order. Any script that has already been run will be skipped. This change allows for easier management of IBSR update scripts.

Creating Tables

When creating tables for a SoftRater database: The template name must be edited to create the proper tables. A table must be created for each product in each project.

1. The SoftRater data table template name should follow the pattern:

DT+PROJECT+ _ +PRODUCT+ _ +SUBSCRIBER

For example: FOR PROJECT #1 AND SUBSCRIBER #206 AND PRODUCT #1 use:

DT1_1_206 and PK_DT1_1_206 for the template holder

CREATE TABLE [DT1_1_206]

Or

CREATE TABLE [dbo].[DT1_1_206] (

2. Run tables in order found in the file: For example, in the Oracle file you would start with oracle.create.dt.template.sql, then oracle.create.packages.sql, and so on.
3. Run the update script last.

Oracle

SoftRater database schema is supported by all available ORACLE database platforms.

JDBC Driver Class

"oracle.jdbc.driver.OracleDriver"

Using prefix jdbc:oracle:thin:

Supported Versions – 11g, 12c, 19c User Account Requirements

Create Table

Create Index

Query access to "SYS.OBJ\$"

NOTE: Performance may be impacted if using the default **optimizer_features_enable** setting on Oracle 12c. For optimal performance, Insbridge recommends setting the **optimizer_features_enable** parameter to 11.2.0.4.

The command to set optimizer feature enabled on Oracle 12c is:

alter system set optimizer_features_enable = '11.2.0.4';

Ref Url: <https://docs.oracle.com/database/121/REFRN/GUID-E193EC9E-B642-4C01-99EC-24E04AEA1A2C.htm#REFRN10141>

IBM DB2

SoftRater database schema is supported on version 9.7.

JDBC Driver Class

“com.ibm.db2.jcc.DB2Driver”

For Native AS400 – “com.ibm.as400.access.AS400JDBCdriver”

Supported Version – 9.7

User Account Requirements

Connect to database

Create Table

Create Packages

Query access to “SYSIBM.SYSTABLES”

Configuration Settings

Required

The query dynamics of the SoftRater system requires some modification to Configuration settings. The following Performance Configurations parameters required to the target SoftRater database.

Instance Level – ASLHEAPSZ >= 1024

Instance Level – QUERY_HEAP_SZ => 10240

Database Level – APPLHEAPSZ >= 1024

Recommended

The query dynamics of the SoftRater system will benefit from the following modification to Configuration settings.

Instance Level – INTRA_PARRALLEL (Yes) – For Symmetrical Processing Machines (CPU >=2)

Database Level – DFT_DEGREE (-1) – For Symmetrical Processing Machines (CPU >=2). Allow the optimizer to determine the degree of intra-partition parallelism based on the number of processors and the type of query.

UPGRADING RATEMANAGER, IBFA AND SR-WIN

NOTICE: The machine where Insbridge is located needs to be rebooted prior to upgrading. Rebooting is necessary to assure that com+ settings are properly updated, Insbridge services are properly stopped and all users are logged off.

Windows should be up and running prior to upgrading.
This update takes RateManager and the corresponding IBFA to release 5.6.1.

Steps to Upgrade RateManager/IBFA

The steps to follow for upgrading RateManager/IBFA depend upon what Insbridge release you are starting from:

Upgrading from Release 4.8.X or previous to release 5.6.1 requires:

A new system requirement and a new file structure have been introduced and affect any 4.8.X or previous release. Insbridge files are now placed in a different location on the server from previous releases. This change requires subscriber, database, and environment information to be re-entered either manually or by copying and placing previous config.xml files to a new location.

A new application pool also is created. This may require updates to any service or web site that calls the Insbridge application. If the Insbridge portal is being used, updates need to be made there as well.

- **OPTIONAL:** For reference, make a copy of the Insbridge config.xml file. Set aside.
- **Step 1:** Verify or Install .NET 4.5.2.
- **Step 2:** Reboot system.
- **Step 3:** Run the Insbridge exe to update the application.
- **Step 4:** Enter IBFA and Configure:
 - Subscriber
 - Database connections
 - Environment
- **Step 5:** Installing the OBI Publisher.
- **Step 6:** Start Insbridge Message Service.
- **Step 7:** Run the required IB_Client, IBRM and Reporting database updates.
- **Step 8:** Update Preferences.
- **Step 9:** Update Group Rights
- **Step 10:** Send notice to RM users to completely clear cache, including Preserve Favorites website data.

NOTE: Updates to the databases can be performed manually, if desired. Manual updates are performed directly in SQL Server.

Additional Step to Upgrade RateManager/IBFA:

You also will need to run these steps if you want to make previous workfiles available to users

This procedure takes RateManager and the corresponding IBFA to release 5.6.1 and assures that previous workfiles are available to users.

- **Step 1:** Migrate Workfiles.
- **Step 2:** Update Portal URL and security.

Upgrading from Release 4.9.X to release 5.6.1 requires:

- **Step 1:** Verify or Install .NET 4.5.2.
- **Step 2:** Reboot system.
- **Step 3:** Run the Insbridge exe to update the application.
- **Step 4:** Start Insbridge Message Service.
- **Step 5:** Login to RateManager and perform IB_Client, IBRM and Reporting database updates.
- **Step 6:** Update Preferences.
- **Step 7:** Update Group Rights
- **Step 8:** Send notice to RM users to completely clear cache, including Preserve Favorites website data.

Steps to Upgrade SoftRater for Windows from a Previous Release

The steps to follow for upgrading SoftRater for Windows depend upon what Insbridge release you are starting from:

Upgrading from Release 4.8.X or previous to release 5.6.1 requires

A new system requirement and a new file structure have been introduced and affect any 4.8.X or previous release. Insbridge files are now placed in a different location on the server from previous releases. This change requires subscriber, database, and environment information to be re-entered either manually or by copying and placing previous config.xml files to a new location.

A new application pool will also be created. This may require updates to any service or web site that calls the Insbridge application. If the Insbridge portal is being used, updates will need to be made there as well.

This setup must utilize SQL Server.

- **OPTIONAL:** For reference, make a copy of the Insbridge config.xml file. Set aside.
- **Step 1:** Verify or Install .NET 4.5.2.
- **Step 2:** Reboot system.
- **Step 3:** Run the Insbridge exe to update the application.
- **Step 4:** Enter IBFA and Configure:
 - Subscriber
 - Database connections
 - Environment
- **Step 5:** Installing the OBI Publisher.
- **Step 6:** Start Insbridge Message Service.
- **Step 7:** Restore new SoftRater database.
- **Step 8:** Update Preferences.
- **Step 9:** Update group rights.
- **Step 10:** Re-load packages.
- **Step 11:** Send notice to RM users to completely clear cache, including Preserve Favorites website data.

Upgrading from Release 4.9.X to release 5.6.1 requires

- **Step 1:** Verify or Install .NET 4.5.2.
- **Step 2:** Reboot system.
- **Step 3:** Run the Insbridge exe to update the application.
- **Step 4:** Start Insbridge Message Service.
- **Step 5:** Restore new SoftRater database.
- **Step 6:** Update Preferences.
- **Step 7:** Update group rights.
- **Step 8:** Re-load packages.
- **Step 9:** Send notice to RM users to completely clear cache, including Preserve Favorites website data.

UPDATING AN INSBRIDGE APPLICATION

Upgrading from Release 4.8.X or previous to release 5.6.1 requires:

A new system requirement and a new file structure have been introduced and affect any 4.8.X or previous release. Insbridge files are now placed in a different location on the server from previous releases. This change requires subscriber, database, and environment information to be re-entered either manually or by copying and placing previous config.xml files to a new location.

A new application pool will also be created. This may require updates to any service or web site that calls the Insbridge application. If the Insbridge portal is being used, updates will need to be made there as well.

This procedure takes RateManager and the corresponding IBFA to release 5.6.1.

- **Step 1:** Verify or Install .NET 4.5.2.
- **Step 2:** Reboot system.
- **Step 3:** Run the Insbridge exe to update the application.
- **Step 4:** Enter IBFA and Configure:
 - Subscriber
 - Database connections
 - Environment
- **Step 5:** Installing the OBI Publisher.
- **Step 6:** Start Insbridge Message Service.
- **Step 7:** Run the required IB_Client, IBRM and Reporting database updates.
- **Step 8:** Update Preferences.
- **Step 9:** Update group rights.
- **Step 10:** Send notice to RM users to completely clear cache, including Preserve Favorites website data.

NOTE: Updates to the database can be performed manually, if desired. Manual updates are performed directly in SQL Server.

Upgrading from Release 4.9.X to release 5.6.1 requires:

- **Step 1:** Verify or Install .NET 4.5.2.
- **Step 2:** Reboot system.
- **Step 3:** Run the Insbridge exe to update the application.
- **Step 4:** Start Insbridge Message Service.
- **Step 5:** Login to RateManager and perform IB_Client, IBRM and Reporting database updates.
- **Step 6:** Update Preferences.
- **Step 7:** Update group rights.
- **Step 8:** Send notice to RM users to completely clear cache, including Preserve Favorites website data.

STEP 1 – VERIFY OR INSTALL .NET 4.5.2

STOP: *.NET 4.5.2 is REQUIRED. DO NOT RUN the Insbridge executable prior to verifying .NET4.5.2 is installed.*

.NET 4.5.2 is not included with the Insbridge installation. The .NET 4.5.2 download can be obtained from Microsoft.

NOTE: *If you are updating from release 4.9, you can skip this step.*

.NET 4.5.2 requires .NET 3.5.1 features to be installed prior to installing .NET 4.5.2. Failure to use .NET 4.5.2 results in errors when accessing IBFA.

1. To verify .Net 4.5.2, select Run from the Start Menu.
2. Type regedt32. Click OK. The Registry Editor will open.
3. Browse to **HKEY_LOCAL_MACHINE→SOFTWARE→Microsoft→NET Framework Setup→NDP→v4→Full**.

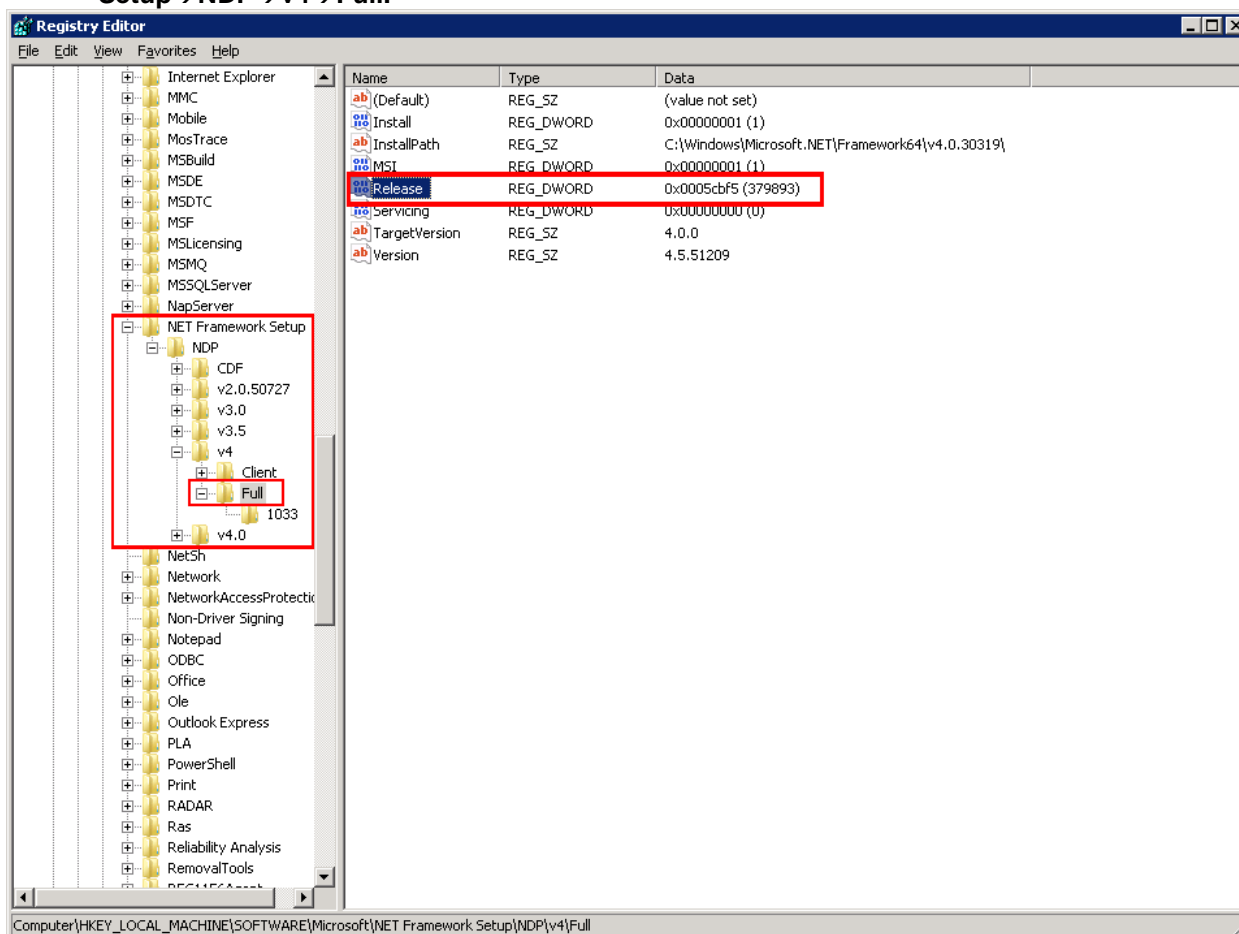


Figure 1 Verifying .NET 4.5.2 in Registry

4. The release number should read 379893. If the number is smaller or the **Full** folder is not present, .NET 4.5.2 has not been installed. **Make sure to look at the v4 folder. DO NOT look at v4.0.**
5. If .NET 4.5.2 is installed, close out the registry and continue.
6. If .NET 4.5.2 is not installed, you must install before you can continue. .NET 4.5.2 must be installed prior to running the Insbridge installation. .NET 4.5.2 requires .NET 3.5.1 features to be installed prior to installing .NET 4.5.2. Make sure .NET 3.5.1 is installed prior to installing .NET 4.5.2.

NOTE: *.NET 4.5.2 is not included with the Insbridge installation. The .NET 4.5.2 download can be obtained from Microsoft.*

Troubleshooting

If you receive an error when accessing IBFA:

```
Could not load type 'System.ServiceModel.Activation.HttpModule' from  
assembly 'System.ServiceModel, Version=3.0.0.0, Culture=neutral,  
PublicKeyToken=b77a5c561934e089'
```

This error may happen when there are multiple versions of .NET Framework on a machine that is running IIS and did not get registered properly.


Please see [http://msdn.microsoft.com/en-us/library/hh169179\(v=nav.71\).aspx](http://msdn.microsoft.com/en-us/library/hh169179(v=nav.71).aspx) for more information.

STEP 2 – REBOOT SYSTEM

The machine where Insbridge is located needs to be rebooted prior to upgrading. Rebooting is necessary to assure that com+ settings are properly updated, Insbridge services are properly stopped and all users are logged off.

Windows should be up and running prior to upgrading.

If the Insbridge Message Service is set to automatic, you must stop the service prior to running the install. Failure to stop the Insbridge Message Service may result in the upgrade not completing properly.

| | | | |
|--|--------------------|-------------|----------|
|  IBRU_05.00.01.09_X64.exe | 8/19/2015 12:01 AM | Application | 1,847 KB |
|--|--------------------|-------------|----------|

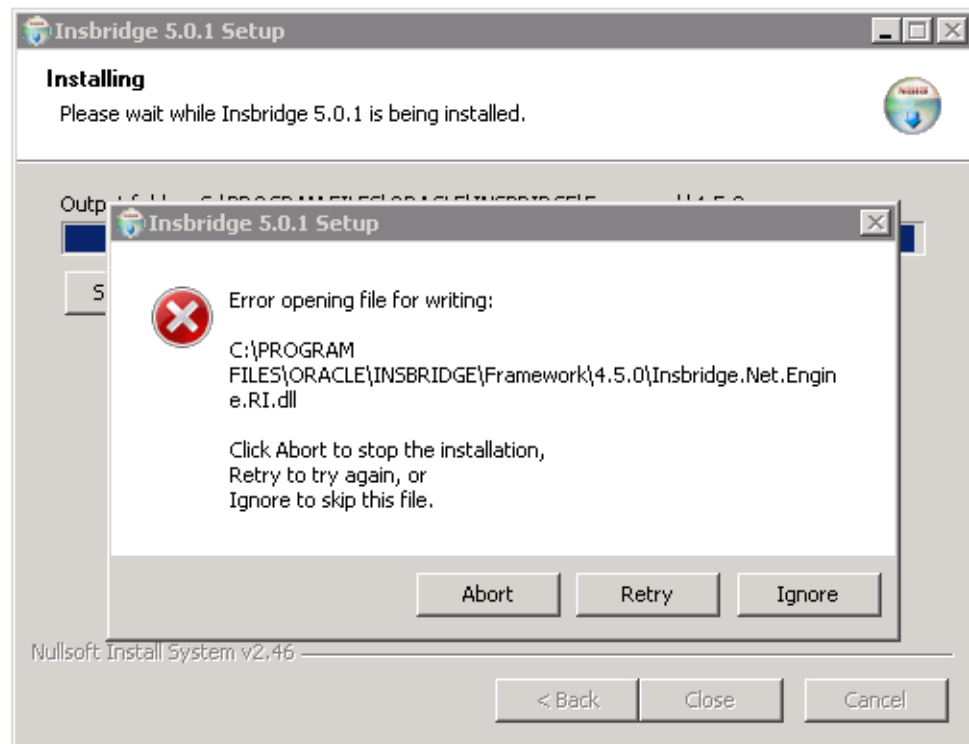


Figure 2 Failure to Reboot Server Error Message

Failure to reboot may cause the update to fail.

Failure to Shut Down Com + Services:

Failure to shut down Com + Services may result in a configured identity error message when users access RateManager. Users may receive an error message that an incorrect username and password are being used or remote access is not allowed.

To correct reboot the server where the Insbridge System was installed. When Windows is up and running, run the Insbridge executable to remove the Insbridge system. Rerun the Insbridge executable again to re-install.

To verify Com+ was updated, enter Com+ and verify the Identity of each of the Insbridge Com+ Services is the Insbridge user. The Identity can be found on Properties->Identity.

NOTE: *The Insbridge Com plus services are started when users access the system.*

Failure to Shut Down Insbridge Message Service:

Failure to shut down the Insbridge Message Service may result in an error message being displayed

during installation and failure to completely install the required Insbridge executable. The best way to ensure the Insbridge Message Service has completely shutdown is to reboot the system.

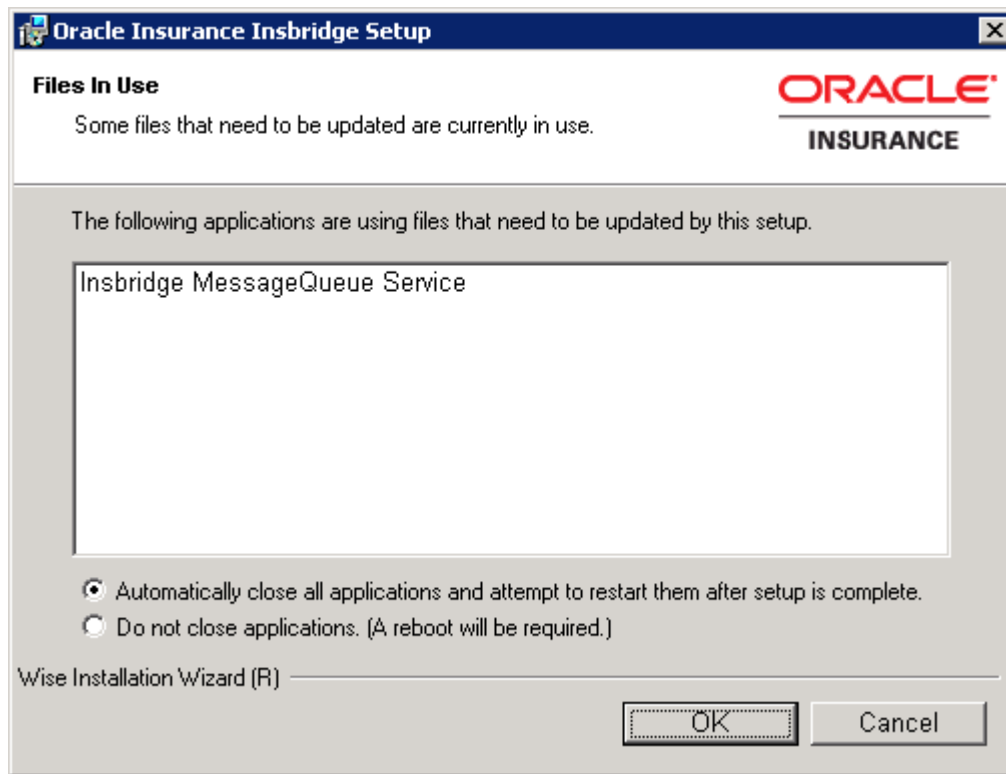


Figure 3 Insbridge Message Service Running During Update

STEP 3 – RUNNING THE INSBRIDGE APPLICATION

An update to the Insbridge system is run from the **Oracle Insurance – Insbridge Enterprise Rating.exe**. Unzip the Insbridge-Windows folder on the machine where the Insbridge system (IBFA and RateManager) is currently installed.

NOTE: The installation program requires that the installer have administrator rights on the machine where the install is occurring.

NOTE: Please close all open applications before running the Oracle Insurance - Insbridge Enterprise Rating file.

1. Begin with the **Oracle Insurance - Insbridge Enterprise Rating Install file**. You must run as administrator.
2. Open the Oracle Insurance – Insbridge Enterprise Rating file. A Welcome screen is displayed.



Figure 4 Installing Insbridge

3. Click on **Next** to continue.

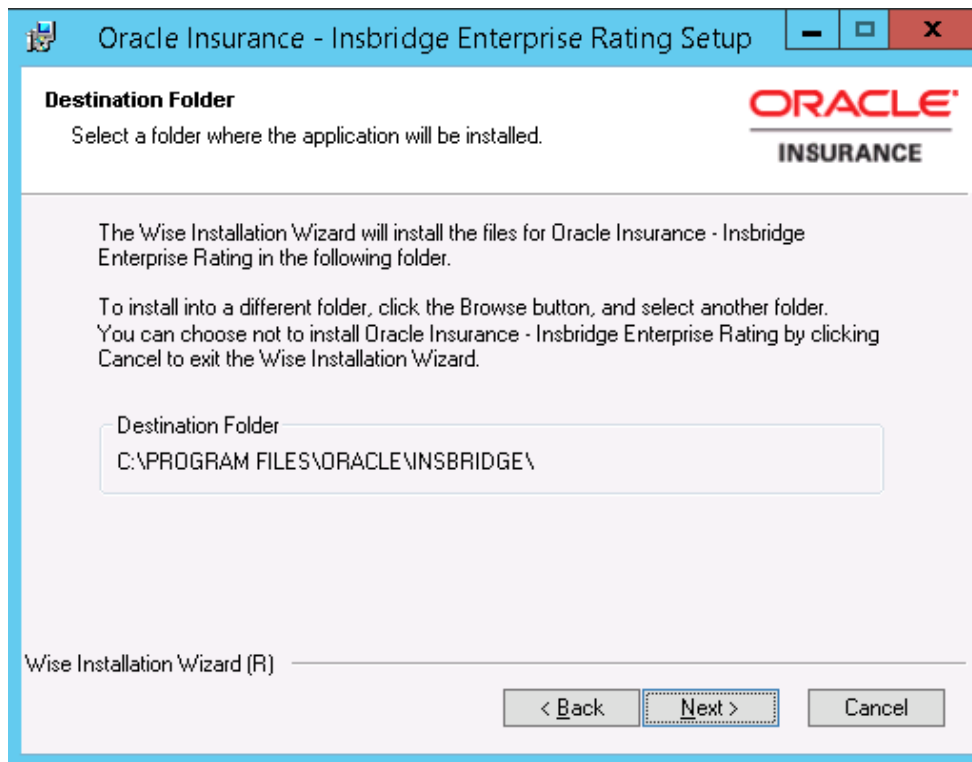


Figure 5 Destination Location for Update

4. The destination path is displayed next. This is an information only screen. Click **Next**.

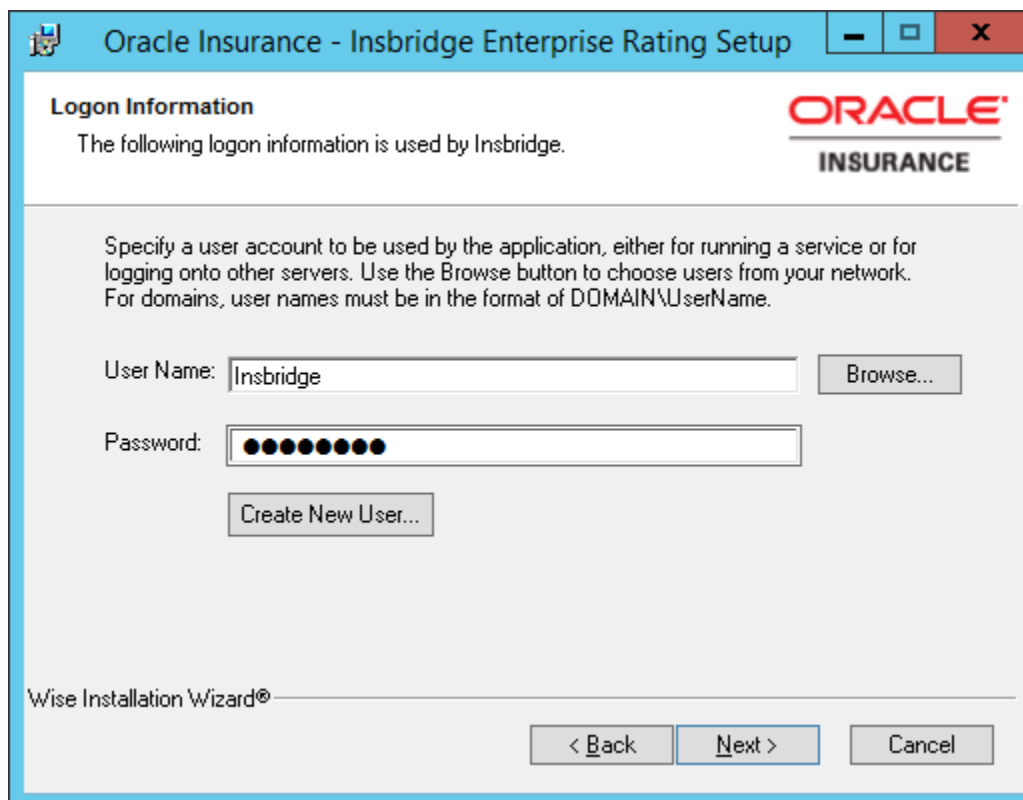


Figure 6 Entering User Information for Insbridge

5. The next screen is the Logon Information screen. Please use the Insbridge user account information that you set up for the initial installation. Click **Next** to continue.

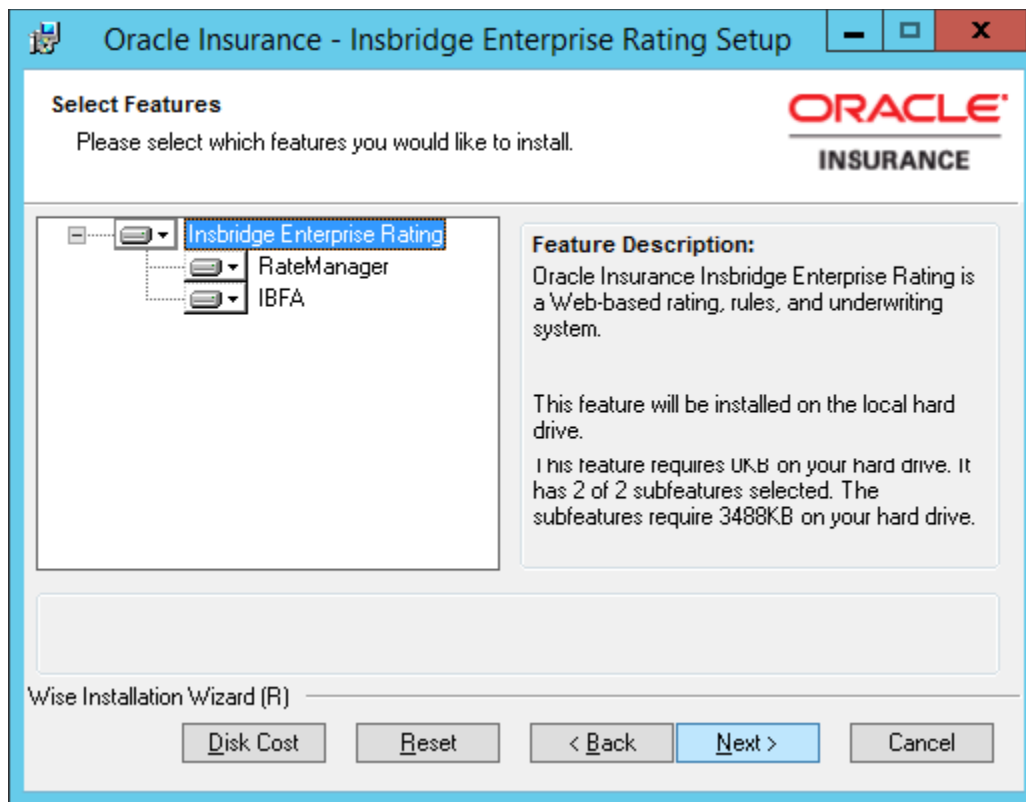


Figure 7 Selecting Features to Install

6. The next screen lists the applications to be installed. To expand the options and view details, click on the downward arrow. All features are checked for installation. RateManager is the only one that you will be allowed to not install. Click **Next**.

Options are:

- **Insbridge Enterprise Rating:**
 - The default option is: Entire feature will be installed on local hard drive.
 - You will not be able to opt out of this selection.
- **RateManager:**
 - The default option is: Entire feature will be installed on local hard drive.
 - You will be able to opt out of this option. Select Entire Feature will be unavailable. RateManager will not be installed.

NOTE: Do not install the RateManager option for SoftRater for Windows (SoftRater Node) updates.

- **IBFA:**
 - The default option is: Entire feature will be installed on local hard drive.
 - You will not be able to opt out of this selection.

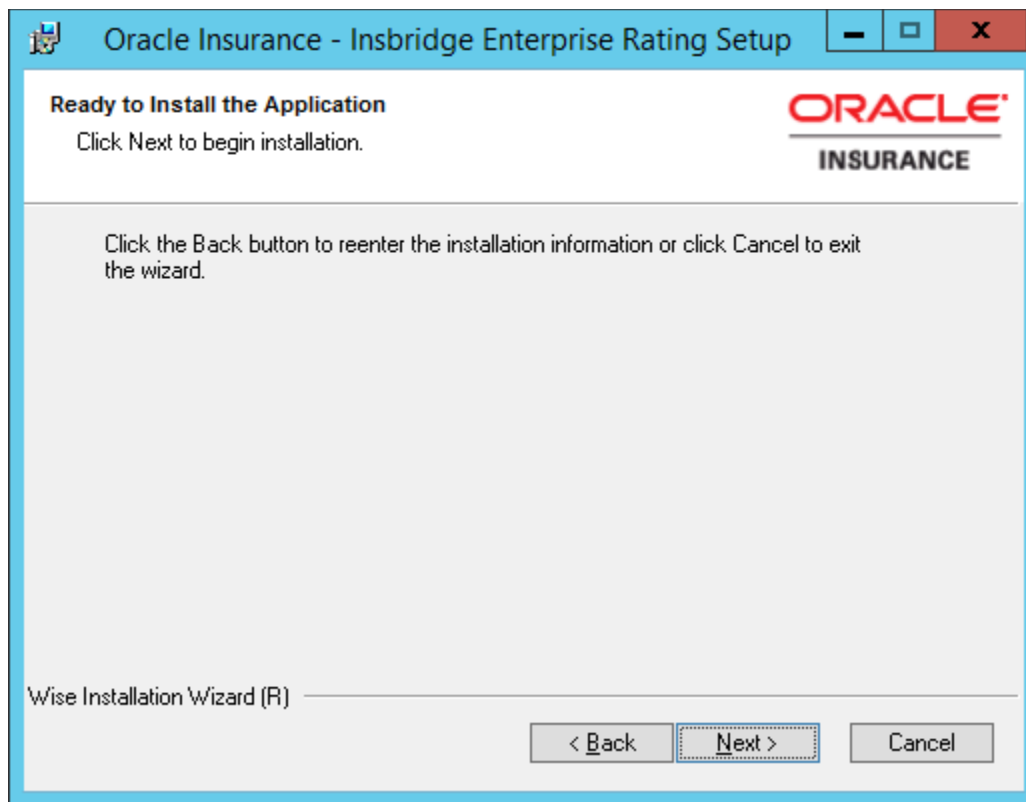


Figure 8 Ready to Install

7. A Ready to Install screen is displayed. If you are ready, click **Next**. Otherwise click Back to check the options you want to install. A progress screen displays your progress.

NOTE: *If you receive a message that the system will need to be rebooted after the installation, **STOP THE INSTALLATION**. This message means that the Insbridge Com + services are running. If you get this message:*

1. *Stop the Installation.*
 2. *Reboot the server.*
 3. *Start the Installation over.*
 4. *If the Insbridge Message Service is set to automatic, you must stop the service prior to running the install.*
-

8. When complete, a ReadMe Information screen is displayed.

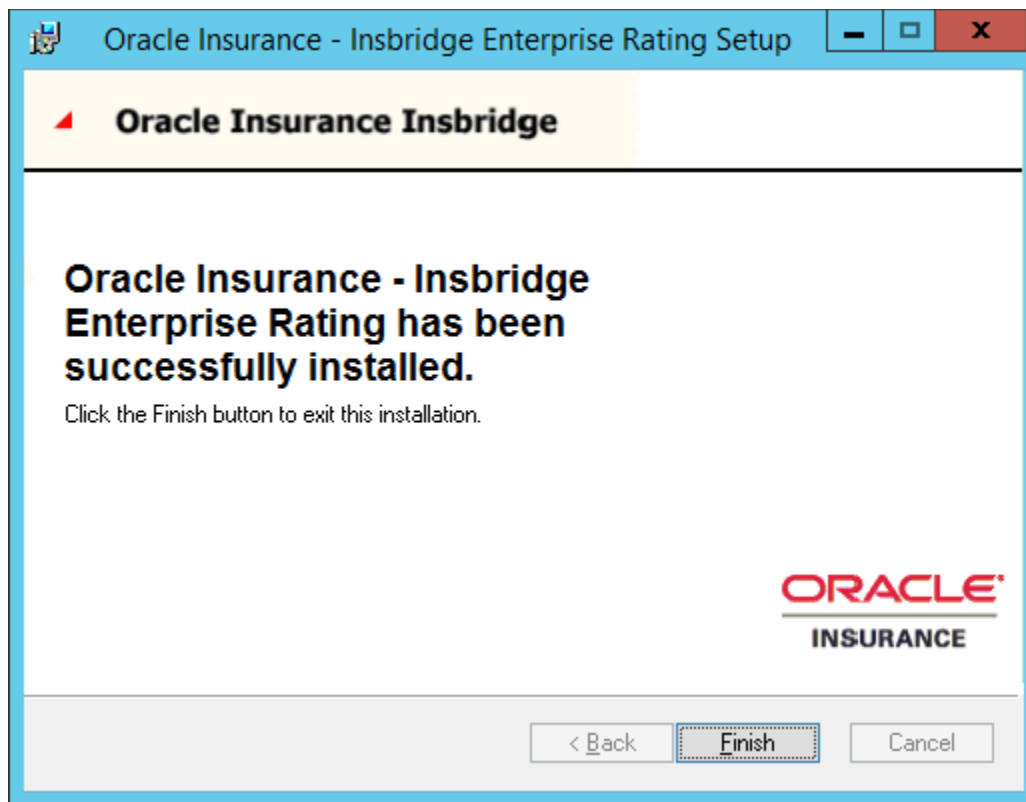


Figure 9 Completed Installation

9. Click **Finish** to finish the installation. The installation should complete successfully.

STEP 4 – CONFIGURING INSBRIDGE FRAMEWORK ADMINISTRATOR

A new system requirement and a new file structure have been introduced and will affect any 4.8.X or previous release. Insbridge files are now placed in a different location on the server from previous releases. This change requires subscriber, database, and environment information to be re-entered either manually or by copying and placing previous config.xml files to a new location.

NOTE: *If you are updating from release 4.9 or later, you can skip this step.*

USING PREVIOUS CONFIG.XML FILES

If you do not want to re-enter IBFA information, you can copy and paste the previous config.xml file from the old location to the new location.

Step 1: Copy the Previous Insbridge.XML File

You can copy and paste the Insbridge XML file from the old machine to the new machine. This will allow the environments and subscriber created in the old machine to be populated in the new machine.

NOTE: *If you want to re-enter or re-create your environments, you can skip Step 4 and Step 5. After you import the registry key, you will need to continue the RateManager/IBFA installation at Step 7 – Configuring Insbridge Framework Administrator.*

File Location:

The location of the Insbridge.XML file to be copied will depend upon what version of RateManager the old machine is running. There are two possible locations.

For Release 3.12 and earlier:

- **File Name:** InsBridge.XML
- **Location:** D:\ProgramFiles\InsBridge\Framework\2.0.2\InsBridge.Xml.
OR C:\Program Files\Oracle\Insbridge\Framework\2.0.0\Insbridge.Xml

For Release 3.13 to 4.8.x:

- **File Name:** InsBridge.XML
- **Location:** C:\Program Files\Oracle\IGBU\Insbridge\Framework\3.5.0\Insbridge.Xml

Copy the Insbridge.XML file to a location you can easily access.

NOTE: *If you are changing databases, you can copy and paste the Insbridge XML file, however you will need to update your environments with the new database information.*

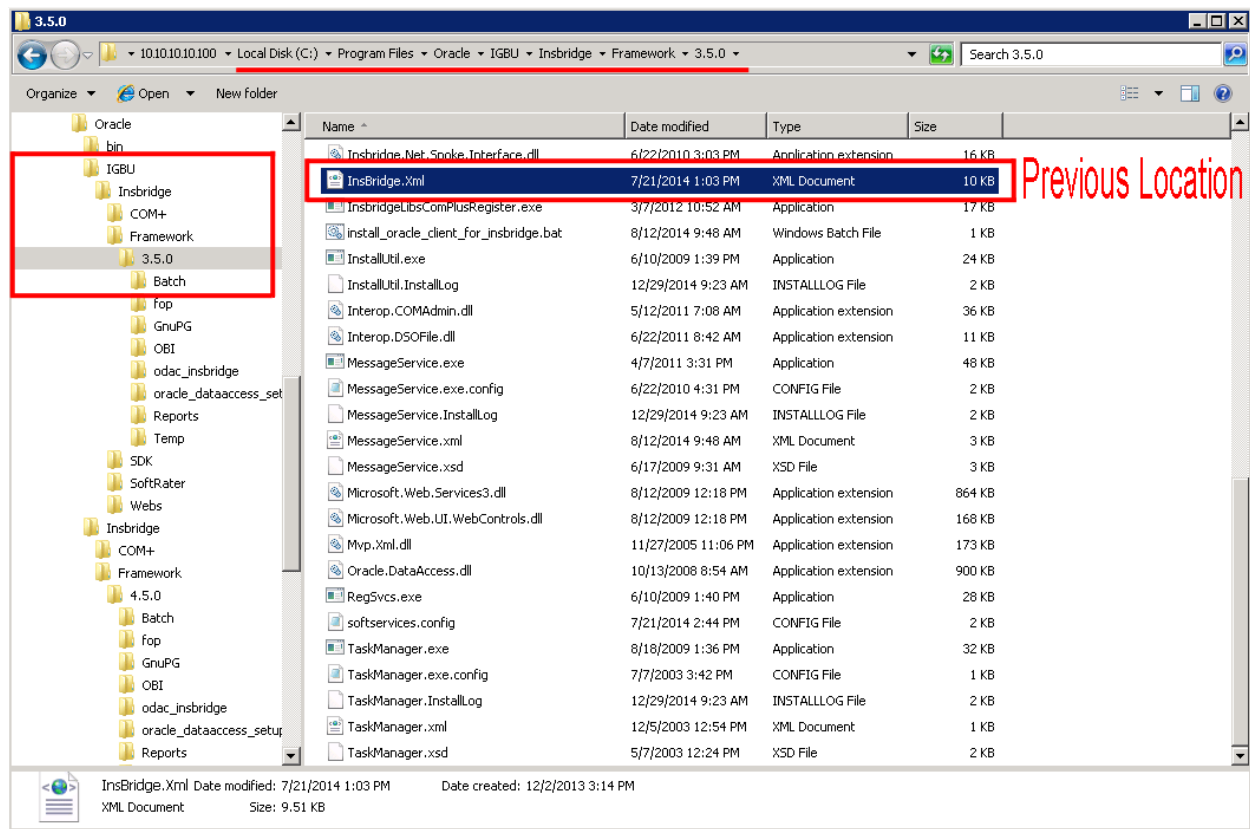


Figure 10 Previous Config.xml file Location

Step 2: Paste the Insbridge.XML File

Before pasting the Insbridge.XML file into the new location, make a copy of the blank Insbridge.XML file and store in a safe location. In the unlikely event that an error occurs, you will have a backup file that you can use.

The Insbridge.XML file in the New Machine is located:

C:\Program Files\Oracle\Insbridge\Framework\4.5.0\Insbridge.Xml

1. Make a copy of the blank Insbridge.XML file on the new machine and store in a safe location.
2. Paste the Insbridge.XML file from the old machine in to the new machine in the same location.
3. Open an Internet Explorer web browser either remotely on the local Insbridge web server and browse to IBFA location on the new machine: <http://SERVERNAME/ibfa/>
4. Subscribers and Environments should be available in IBFA on the new machine. Verify your entries.

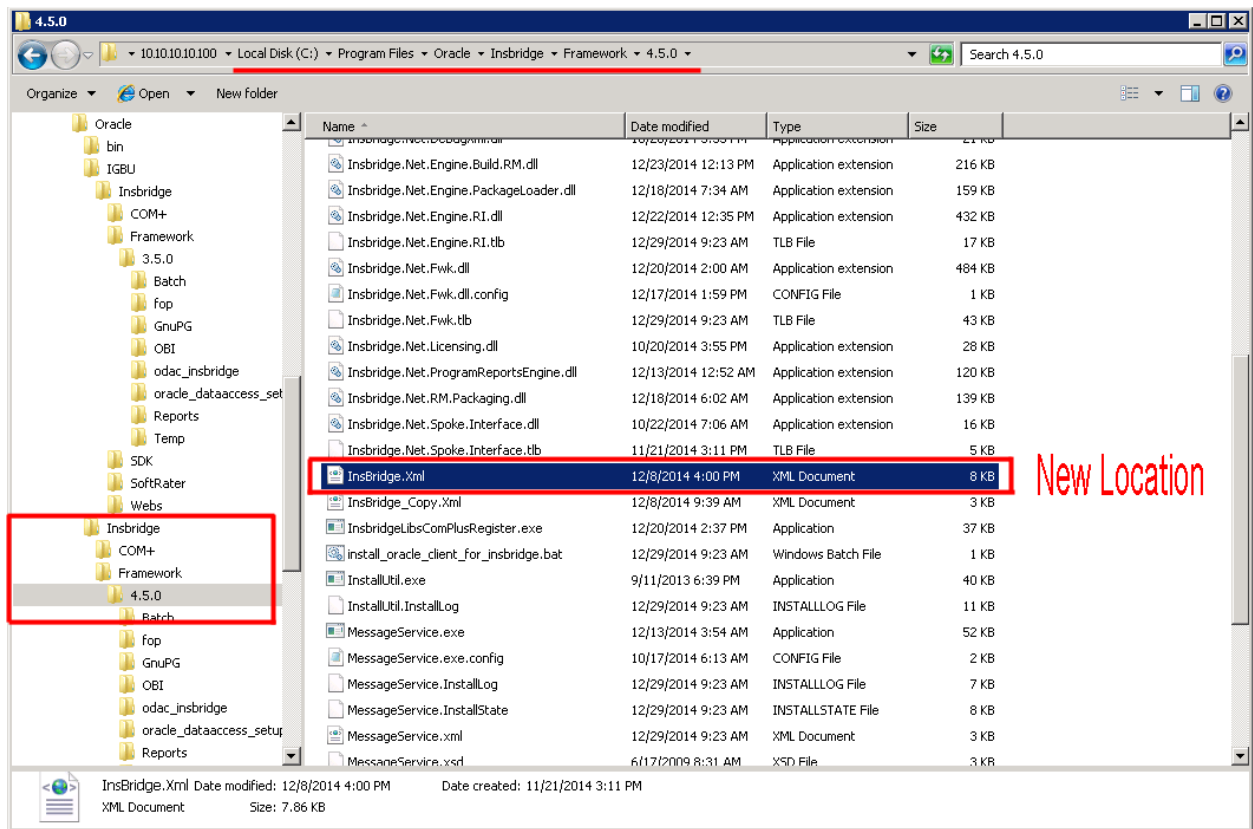


Figure 11 New Config.xml File Location

Logging in to IBFA

If you have elected to re-use an existing config.xml file, IBFA should be populated with the same information as the previous Insbridge instance.

If you want to re-enter the information, IBFA will be blank.

Open an Internet Explorer web browser and browse to the following location, replacing SERVERNAME with the actual server name:

<http://SERVERNAME/IBFA>

The default security setting for a new installation is Custom and requires a login to access.

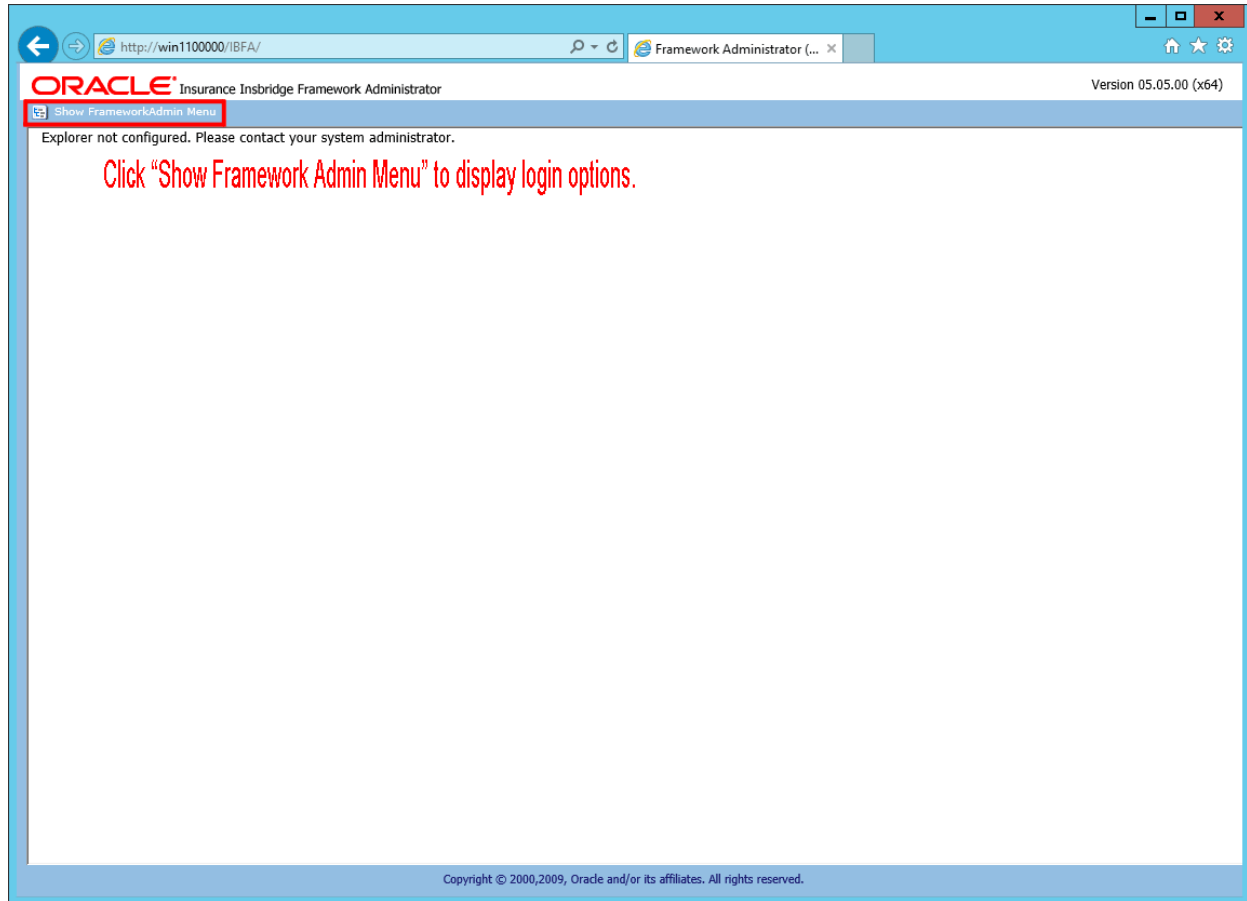


Figure 12 IBFA Landing Page

1. IBFA requires a login to access. Click the Show FrameworkAdmin Menu link to display the login.

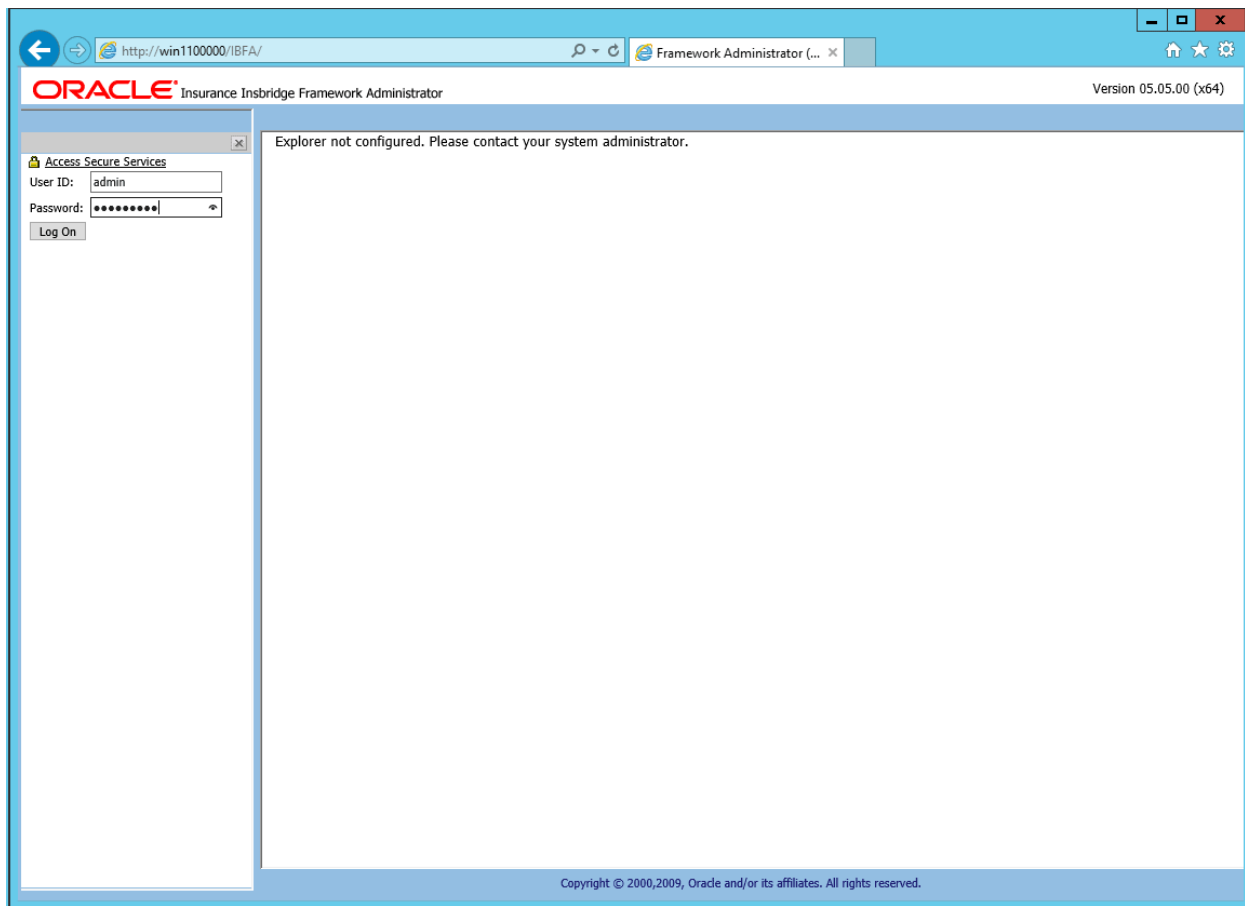


Figure 13 IBFA Login Screen

2. Enter the default User ID and password:

User ID: admin

Password: insbridge

3. The IBFA home page is displayed.

Troubleshooting

For MS Windows 2012 R2 installations, you may receive an error when accessing IBFA for the first time:

The data protection operation was unsuccessful. This may have been caused by not having the user profile for the current thread's user context, which may be the case when the thread is impersonating.

If this error is presented, locate the Insbridge Application Pool on the server where Insbridge was installed. Administrative Tools → IIS Manager → ORACLE_FSGBU_INSBRIDGE, right click, and select Advanced Settings. Change the Load User profile to True.

Updating IBFA Security

1. It is recommended that you change the login password immediately. You do not have to change the password.
2. On the left side menu, select Security → Change Password.

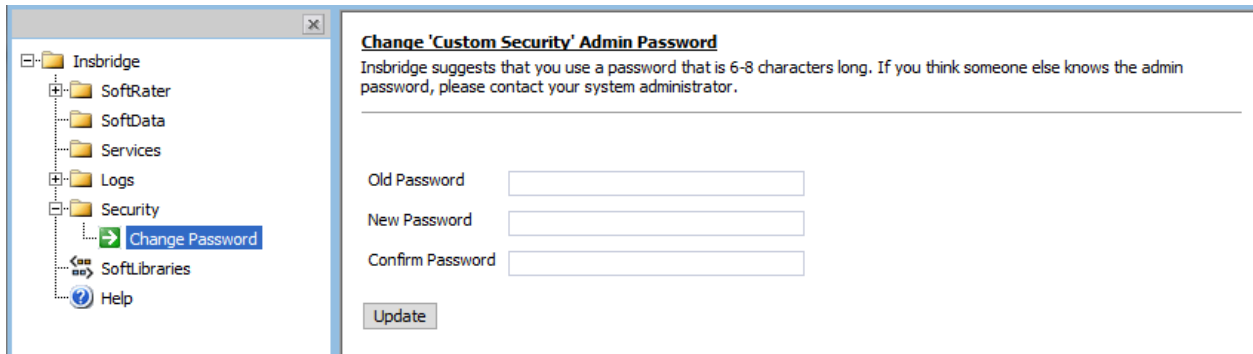


Figure 14 Updating the Default Password

3. Enter in the default password for the old password and enter in the new password of your choice. Confirm the new password and click Update. A success message is displayed when the admin password is updated. If an error message is displayed, make corrections and try again.
4. If you do not want to require a login, you can change the security to None. This changes the default landing page to the IBFA home page and removes any login requirements.

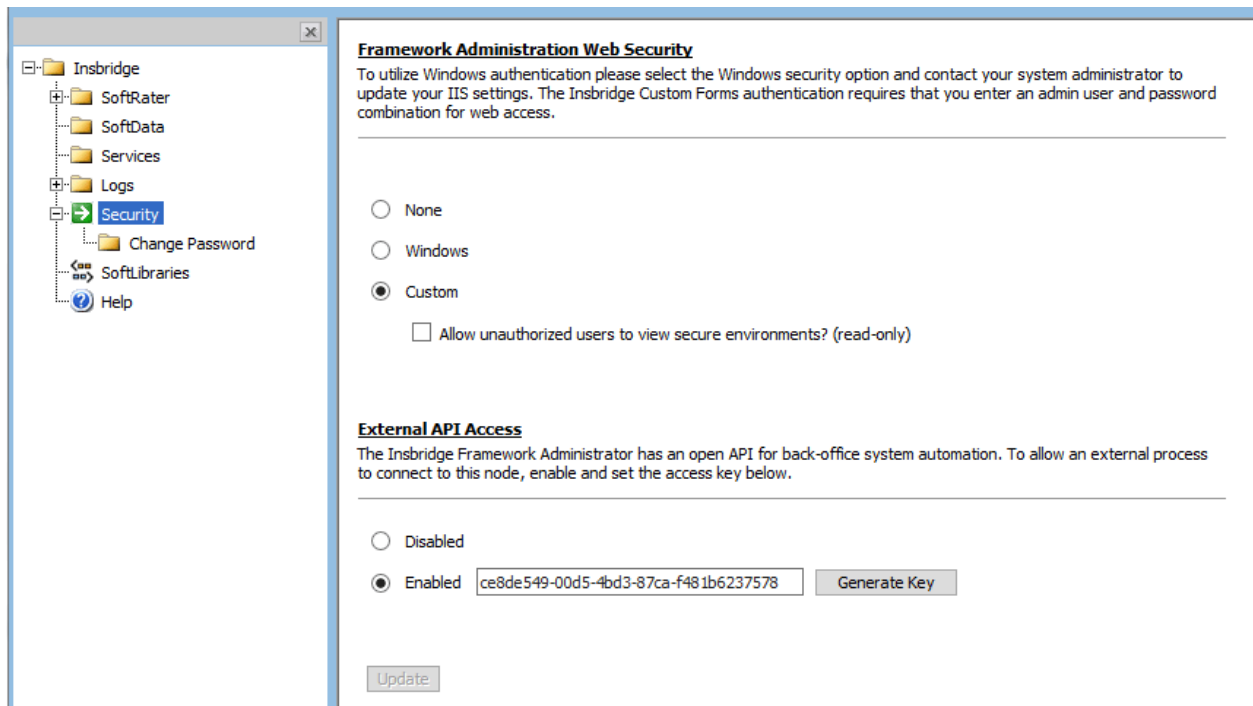


Figure 15 Selecting Security for IBFA

5. On the left side menu, select Security.
6. Select None for Framework Administration Web Security for no security. The landing page will be updated the IBFA home page and no login will be required.

NOTE: You also can select to use Windows security. Please see the IBFA user guide for more information on setting up Windows security.

Entering Company Information

If you have elected to re-use a previous config.xml file, you may skip to the next step.

Prior to users entering RateManager, the Insbridge Framework Administrator must be configured for your company.

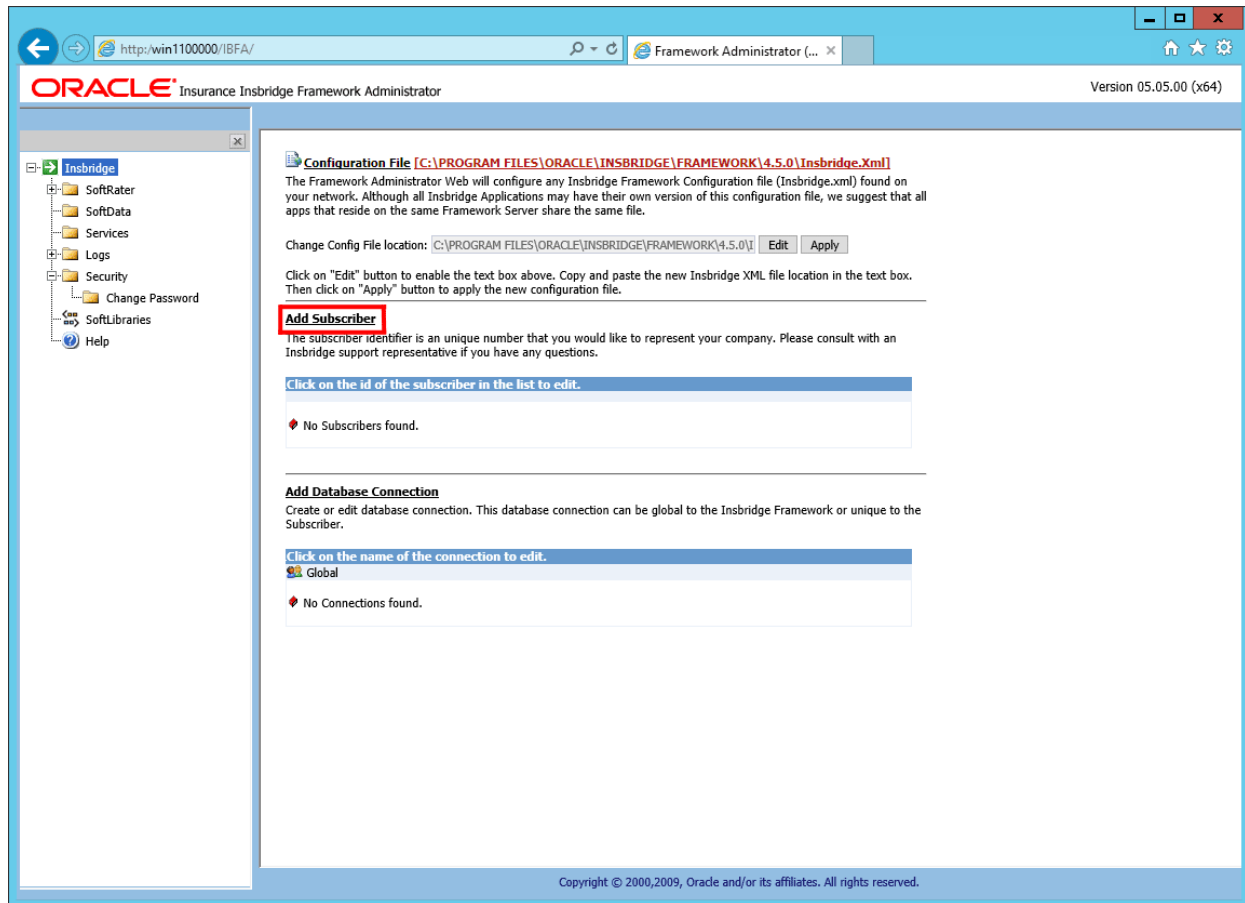


Figure 16 IBFA Home

NOTE: *If you receive an access denied error message, please verify that you have given the Insbridge user full control of the Insbridge folder.*

NOTE: *If you receive an IDNX denied error message, please verify that the Insbridge user has full control over the Insbridge directory. Regedt->Insbridge Directory-> Security.*

There are five steps that need to be done in IBFA:

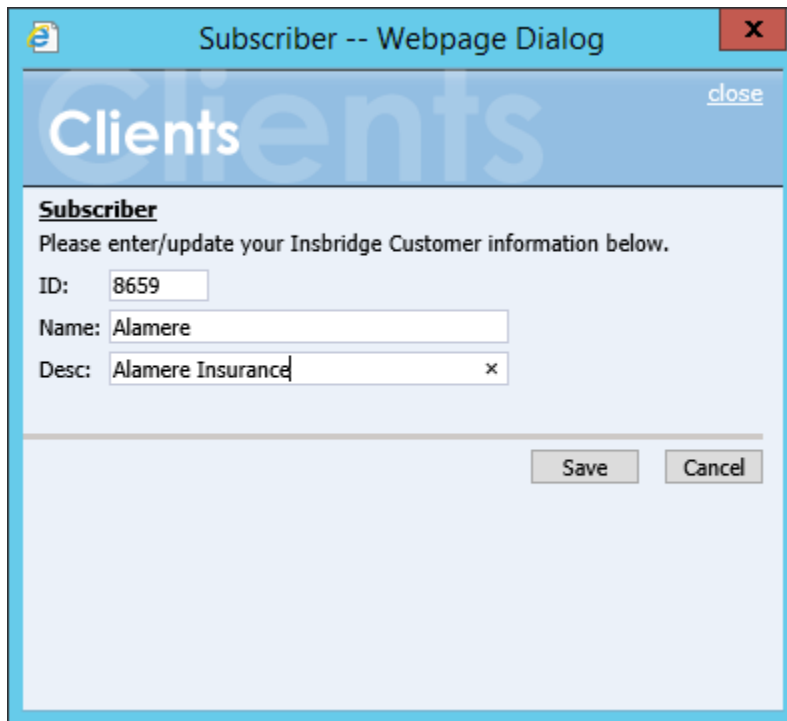
- **Step 1: Creating a New Subscriber**
- **Step 2: Adding a Global Database Connection**
- **Step 3: Adding a Security Database Connection**
- **Step 4: Adding an RM security Database Connection**
- **Step 5: Creating a RateManager Environment**

Step 1: Creating a Subscriber:

A *subscriber* is a group or collective of users and environments under a single identity. This identity is used to manage and configure the group's activities and databases. A subscriber may be a single company, a group within a company, or a single person.

The ID, Name and Description are selected by you. The ID and Name are fixed after the first time you save. These entries cannot be edited. Only the description can be edited.

1. Click on **Add Subscriber** on the Main IBFA screen. A separate screen is displayed.
2. Enter the **ID**, **Name** and **Description** for your subscriber.
3. When you finish entering the information, click **Save**. The new subscriber will now be displayed in the list of subscribers.



Subscriber -- Webpage Dialog

close

Clients

Subscriber

Please enter/update your Insbridge Customer information below.

ID: 8659

Name: Alamere

Desc: Alamere Insurance x

Save Cancel

Figure 17 Enter ID

NOTE: Make note of the subscriber ID number. You may need to enter this on another IBFA or IBSS environment.

The Subscriber ID can be a 1-5 digit number and must be unique for each subscriber. For example, if you have an instance of IBFA on machine A, you can create a subscriber with an ID of 100. On machine A, if you create another subscriber, you must give that subscriber a different ID number, say 200. If you also have an instance of IBFA on a different machine, B for example, you should duplicate the same subscribers with the same ID numbers on machine B.

If you require assistance or are unsure of what action to take, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.

Next Step: Add Database Connections:

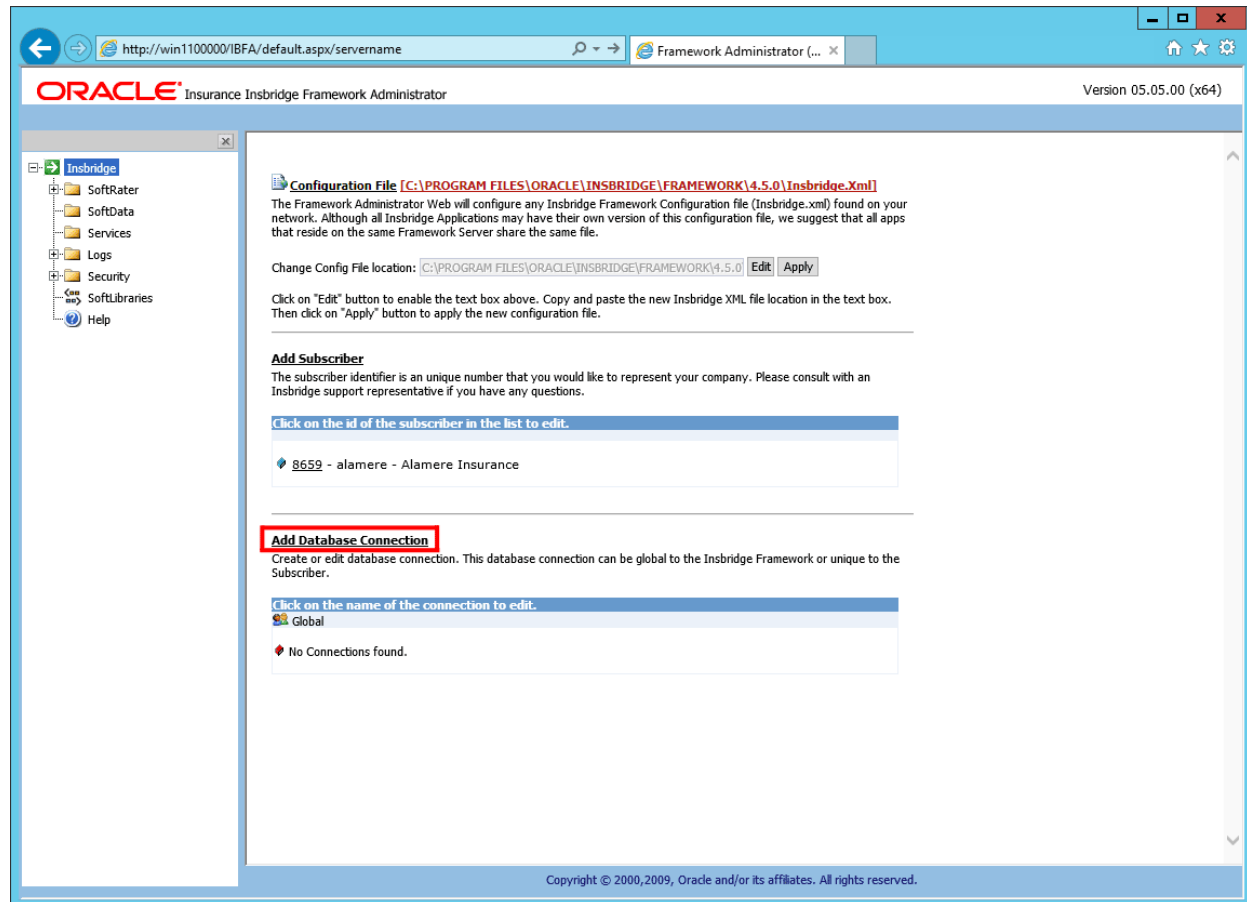


Figure 18 Adding Database Connections

Stay on the Main IBFA screen. Three databases must be added to IBFA:

- Subscriber: **Global** with Name: **controller**. This is a global database and is required for logging in to the Inbridge system. This is not unique to the subscriber.
- Subscriber: (**Your Subscriber Name**) with Name: **security**. This is a subscriber specific database and is required for subscriber security information.
- Subscriber: (**Your Subscriber Name**) with Name: **RM**. This is a subscriber specific database and is required for RateManager. This information will also be used when creating the RateManager environment.

The setups are similar for all three databases. The description information following the first example will be the same for the other two databases.

NOTE: *If you have renamed the databases, please make note of the new names.*

To continue, you will need to exact names of the databases you restored in Step 5, IBRM_xxxx, and IB_CLIENT databases.

Step 2: Adding a Global Database Connection:

Begin by filling out connection information for the IB_CLIENT database using the Global subscriber.

1. From the Insbridge page, click the **Add Database Connection** link. This opens the Connection screen.

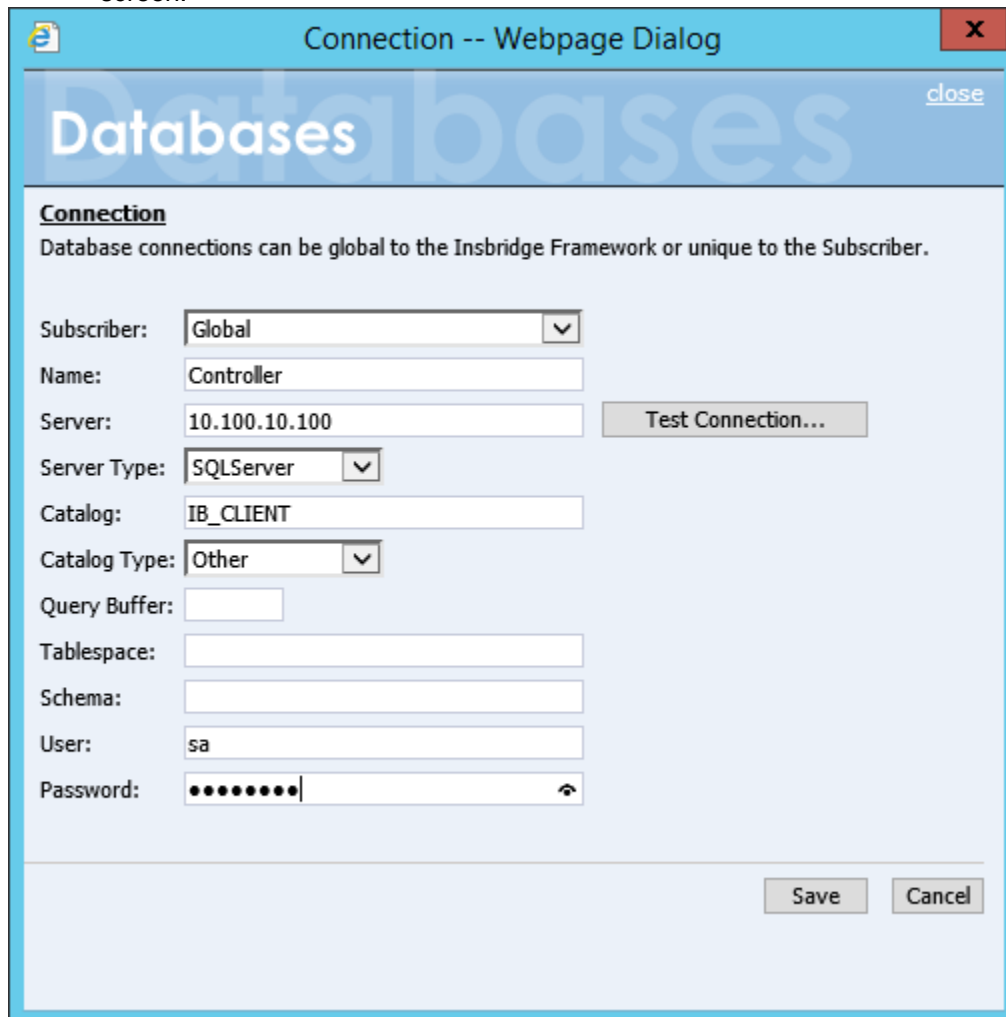


Figure 19 Setting up the Global Database Connection

2. **Select Global for the Subscriber.**
3. Enter **Controller** for the Database **Name**. The name must be Controller. This cannot be changed once you have saved it.
4. The **Server** is the database server name or IP address whichever is resolvable by the Insbridge web server. You also can test the connection and make sure it is valid at the time of entry.
5. The **DB Server Type** is the type of server that houses the database. The controller, security and rm databases are all SQL Server.
6. Enter **IB_CLIENT** for the **Catalog**. This is the IB_CLIENT database you restored in step 5.
7. Select the **Catalog Type**. The types available are: RateManager, SoftRater and Other. The controller and security databases will both be type OTHER. The rm database will be type RateManager.
8. Query Buffer, Tablespace and Schema are not required for the controller, security and rm databases.
9. The **User** and **Password** is for the SQL Server user (for example, insbridge) assigned as database owner.
10. Click **SAVE** to save your work. You will be returned to the main Insbridge page. The controller database will be listed.

Step 3: Adding a Security Database Connection:

1. Next, add the security database. Select the **Add Database Connection** link again.
2. **Select Your Subscriber**. The security database is unique to the subscriber.

The screenshot shows a web-based configuration window titled "Connection -- Webpage Dialog". The main heading is "Databases". Below it, the "Connection" section explains that database connections can be global to the Insbridge Framework or unique to the Subscriber. The form includes the following fields and controls:

- Subscriber:** A dropdown menu with "Alamere Insurance" selected.
- Name:** A text input field containing "Security".
- Server:** A text input field containing "10.100..10.100". To its right is a "Test Connection..." button.
- Server Type:** A dropdown menu with "SQLServer" selected.
- Catalog:** A text input field containing "IB_CLIENT".
- Catalog Type:** A dropdown menu with "Other" selected.
- Query Buffer:** An empty text input field.
- Tablespace:** An empty text input field.
- Schema:** An empty text input field.
- User:** A text input field containing "sa".
- Password:** A text input field with masked characters (dots) and a toggle icon.

At the bottom right of the dialog are "Save" and "Cancel" buttons.

Figure 20 Setting up the Security Database Connection

3. Enter **Security** for the Database **Name**. The name must be Security. This cannot be changed once you have saved it.
4. The **Server** is the database server name or IP address whichever is resolvable by the Insbridge web server. You also can test the connection and make sure it is valid at the time of entry.
5. The **DB Server Type** is the type of server that houses the database. The controller, security and rm databases will all be SQL Server.
6. Enter **IB_CLIENT** for the **Catalog**. This is the IB_CLIENT database you restored in step 5.
7. Select the **Catalog Type**. The types available are: RateManager, SoftRater and Other. The controller and security databases will both be type OTHER. The rm database will be type RateManager.
8. Query Buffer, Tablespace and Schema are not required for the controller, security and rm databases.
9. The **User** and **Password** is for the SQL Server user (for example, insbridge) assigned as database owner.
10. Click **SAVE** to save your work. You will be returned to the main Insbridge page. The controller database will be listed

Step 4: Adding an rm Database Connection:

1. Next, add the rm database. Select the **Add Database Connection** link again.
2. **Select Your Subscriber**. The rm database is unique to the subscriber.
3. Enter **rm** for the Database **Name**. This cannot be changed once you have saved it.
4. The **Server** is the database server name or IP address whichever is resolvable by the Insbridge web server. You also can test the connection and make sure it is valid at the time of entry.
5. The **DB Server Type** is the type of server that houses the database. The controller, security and rm databases will all be SQL Server.
6. Enter **IBRM_xxxx** for the **Catalog**. This is the RM database you restored in step 5.
7. Select the **Catalog Type**. The types available are: RateManager, SoftRater and Other. The controller and security databases will both be type OTHER. The rm database will be type RateManager.
8. Query Buffer, Tablespace and Schema are not required for the controller, security and rm databases.
9. The **User** and **Password** is for the SQL Server user (for example, insbridge) assigned as database owner.
10. Click **SAVE** to save your work. You will be returned to the main Insbridge page. The controller database will be listed

Figure 21 Setting up the RateManager Database Connection

NOTE: The **Catalog Type** must be set to **RateManager** when you are creating the Connection from RateManager. If you leave it set to Other, you will receive an error.

Creating Logical Environments:

Next, create the default rating environment for the RateManager system.

For a new installation it is recommended that you create one logical environment:

- RM: to handle rating and testing.

You can create additional environments at this time if necessary or you can add them in at a later time.

Step 5: Creating a RateManager Environment:

It is recommended that only one RateManager environment be created.

1. Browse to **SoftRater**→**Explorer**→**Subscriber name**.

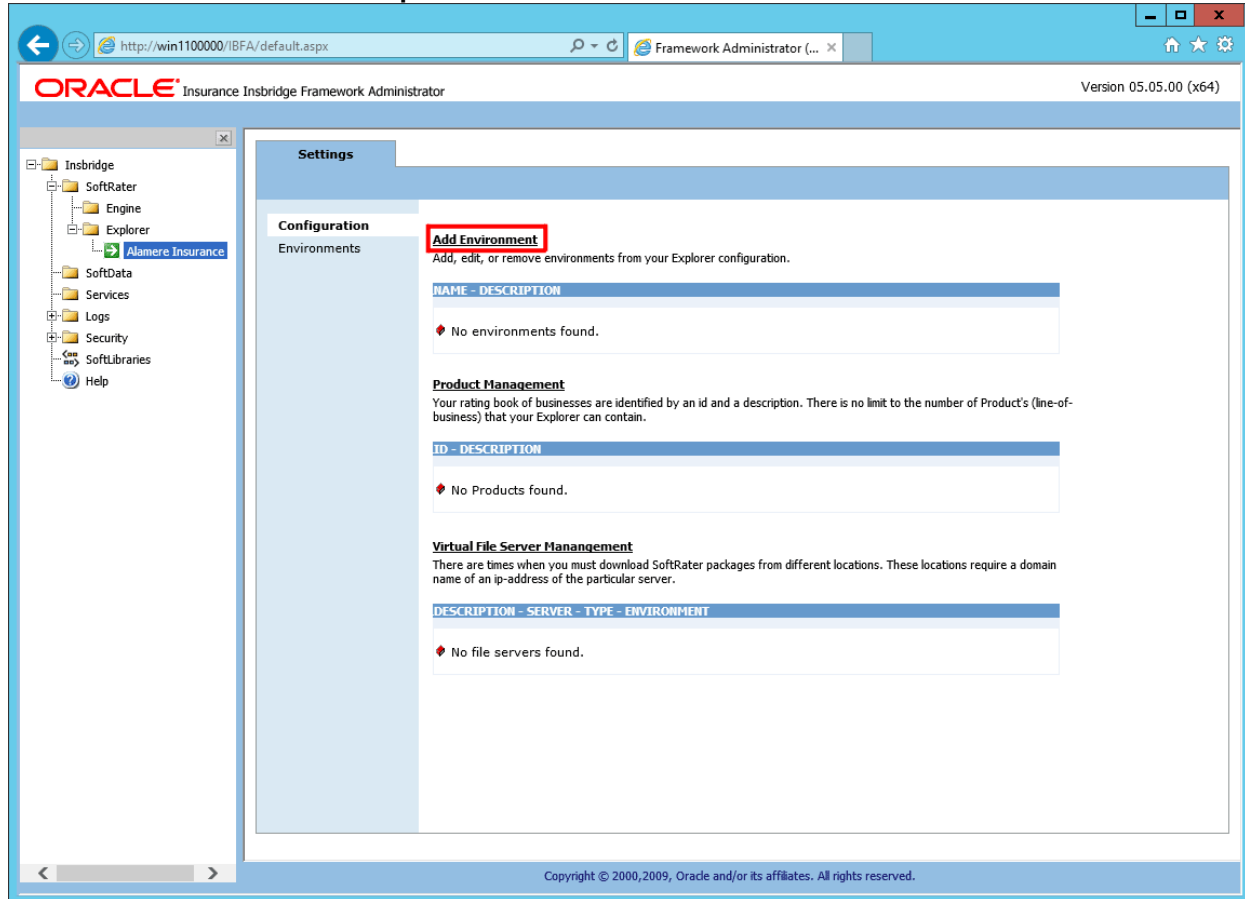


Figure 22 Create a Rating Environment

2. Click on **Add Environment**.

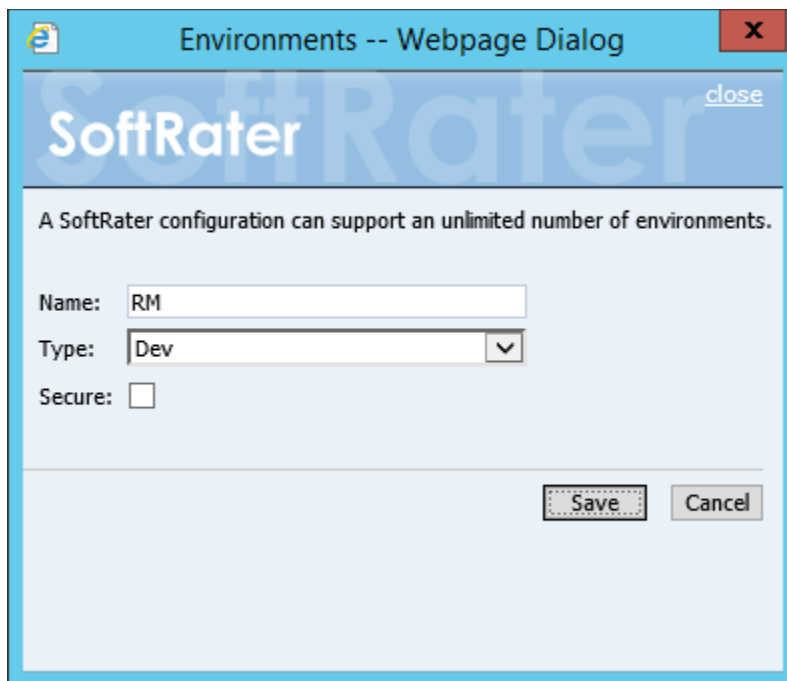


Figure 23 Entering Name and Environment

3. Enter a Name and select a Type. The name and type are totally dependent on how your Insbridge system is designed.

There are three types of Logical Environments:

- **Development**
- **Quality Assurance**
- **Production**

After you have entered your logical environment, you must define it.

Defining the Logical Environment

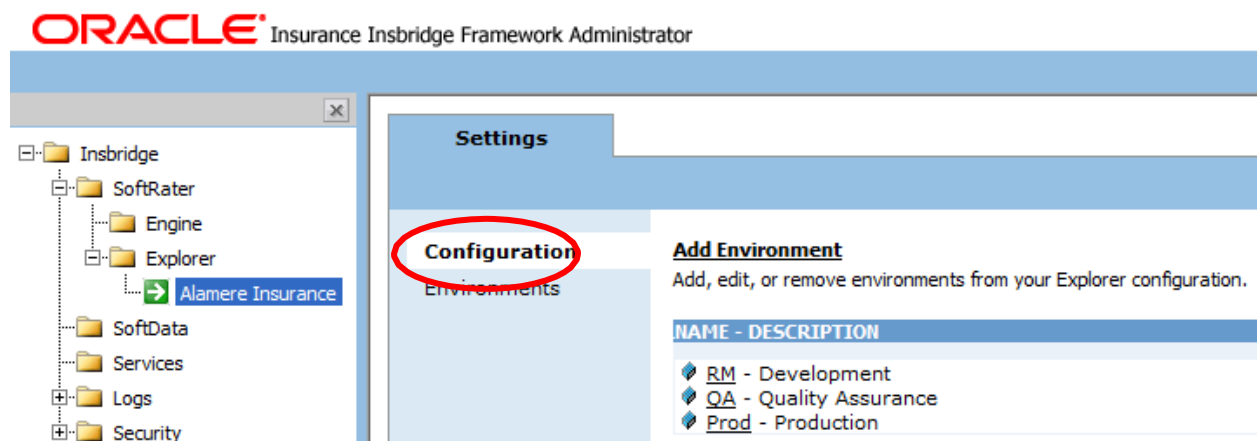


Figure 24 Obtaining Environment Information

1. Select the **Environments** link under the Configuration header on the left hand side to enter the configuration information for the newly created logical environment. You will be placed on the Environments screen. The environments you previously setup will be listed. If an environment is missing, you must return to the Configuration subtab and add it.

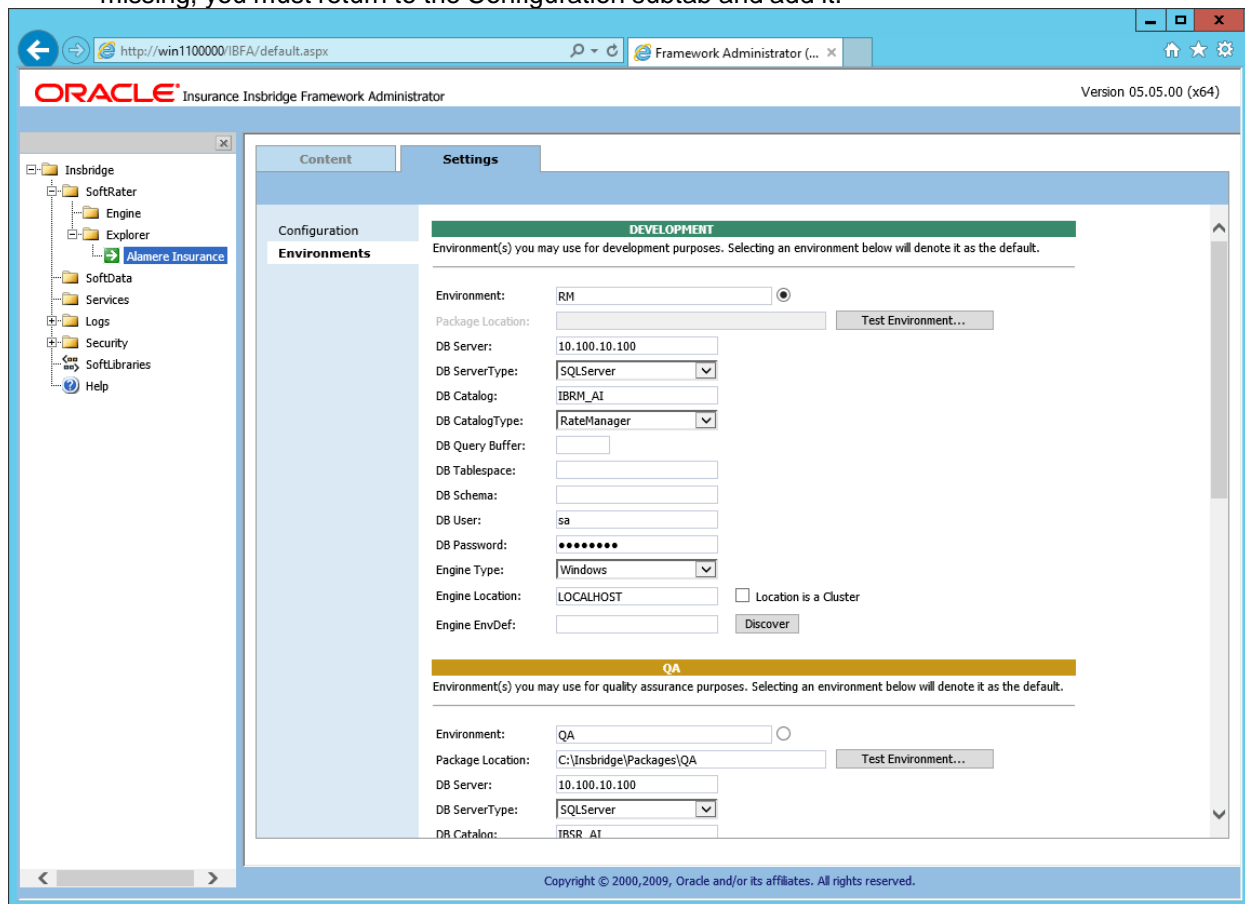


Figure 25 Editing Environment

2. The **Environment Name** will be complete. No changes are needed.
3. RateManager environments will not have a **Package Location**. No entry will be allowed.
4. Enter in the **DBServer** name or IP address. This is the database server where the RateManager database was restored. For DB2 servers, this is the DB2 Registered Alias Name. For Oracle servers, this is the server name; either IP or DNS will work. The default port used is 1521. The Database listener port number can be appended to the server name if it is something other than the default port. The format for this is: [SERVER NAME]:[PORT NUMBER]

NOTE: If a specific instance of SQL Server is required, for example if a shared MS SQL Server is being utilized, the format for this is: [SERVER NAME\INSTANCE NAME]:[PORT NUMBER]

5. The **DB Server Type** will be **SQL Server**.
6. The **DB Catalog** is the name of the RateManager database restored in SQL Server.
7. The **DB Catalog Type** is **RateManager**.
8. **DB Query Buffer**, **DB Tablespace** and **DB Schema** are not required for a RateManager environment.
9. Enter the **DB User** name and **Password**.
10. The **Engine Type** is **Windows**.
11. The **Engine Location** default is **LOCALHOST**. Most RateManager installations have a local engine location. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located. Do not change LOCALHOST to the name or IP address of the local machine.
12. The **Engine EnvDef** default is a blank field. Most RateManager installations do not require an

entry in this field. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located.

13. Click **Save** to save your entries. After you have saved your settings, a new tab will be displayed, Content. This tab will not be needed for a new installation.

No further entries are required at this time. If you want to make additional entries you can.

Additional environments can be added at any time.

If you are running a Windows only environment you can set up your SoftRater databases at this time. Follow the same procedure of restoring the database, then entering in IBFA.

Optional Setting: Threads

If you know the number of Web Rate Threads you need, you can enter this information now. If you do not know, you can enter this information later. For more information on threads, please see the IBFA User Guide.

WARNING: Before changing the number of threads, you should consult with your system administrator. Setting the number too high can result in poor performance or even a system crash. If you are unsure of how many threads to use, set the number to 1. For single processor systems, Insbridge recommends a maximum of 2 threads.

There are three thread settings in the Insbridge system:

- **Batch Packing Thread:** Found on the Preferences screen of RateManager. This setting is the maximum number of threads to be used for RateManager Batch Packaging. Batch packaging is building of packages inside RateManager. This thread setting will not affect rating or any other process in IBFA.
- **IBFA Web Threads:** Found on the SoftRater Engine page in IBFA. This setting is the maximum number of threads to be used for rating that is sent through the SoftRater web services. If you want responses to be returned in the order submitted, this thread setting must be higher than the maximum number of rate requests contained within a single XML request.
- **IBFA Message Services Threads:** Found on the Message Services page in IBFA. Individual thread usage can be set for Batch Rating, Batch Scenario and SoftRater-Package.

- **Packaging (Table Variable) Threads:** Found on the SoftRater Engine page in IBFA. This setting is the maximum number of threads to be used when packaging table data. If you want responses to be returned in the order submitted, this thread setting must be higher than the maximum number of rate requests contained within a single XML request.

STEP 5 – INSTALLING THE OBI PUBLISHER

OBI Publisher is necessary for reports. If you do not plan on using reports in RateManager or IBFA, you do not need to install this program. If you are updating from release 4.9, you do not need to re-install OBI Publisher.

STOP: *If you are updating from release 4.8 or earlier, OBI Publisher must be re-installed. Previous instances of OBI will not work with any release after 5.0.1.*

NOTE: *If you are updating from release 4.9 or later, you can skip this step.*

1. Unzip the OBI_PUBLISHER

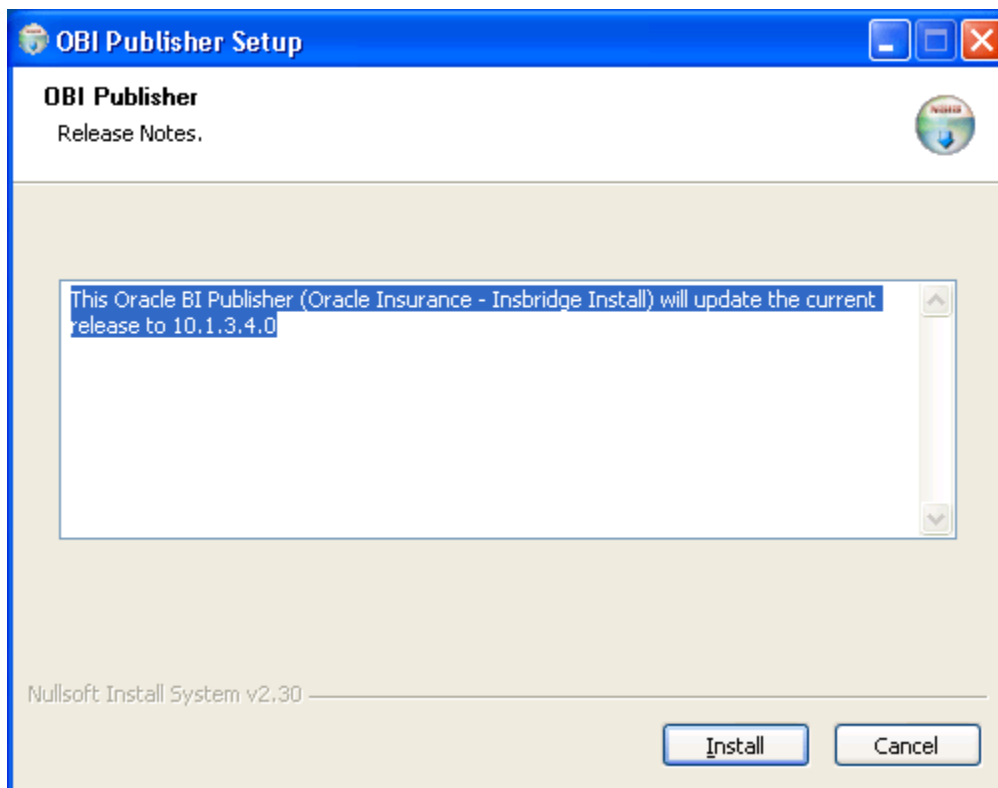


Figure 26 Installing OBI Publisher

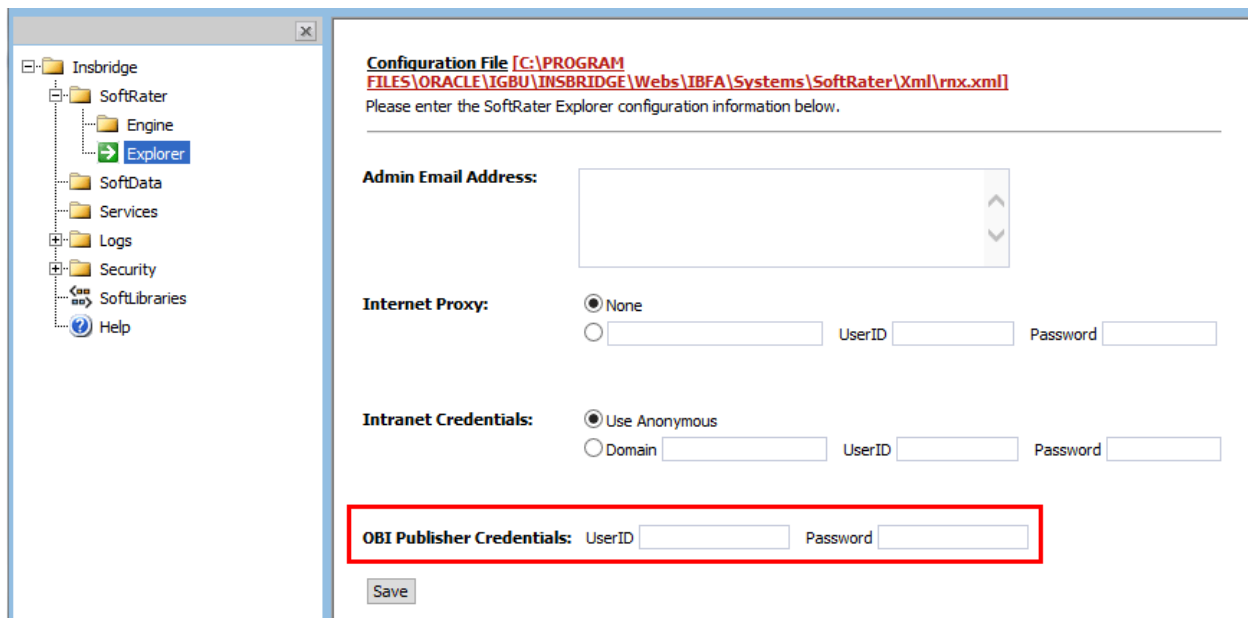
2. Click **Install**. A progress screen will be displayed.
3. When complete, click **Close**.

4. In order for OBI Publisher to be available to users, you must start the **Insbridge Message Service**. The Insbridge Message Service can be started from IBFA or from Server Manager on the server where installed.

NOTE: The location and port for OBI Publisher is <http://localhost:9704/xmlpserver/>. This information may be needed if you have to make a request to your company's infrastructure and request the security team to open the ports used by Publisher.

OBI Security

The OBI Publisher requires a default User ID and password to be entered in IBFA. OBI is required to create certain reports in RateManager. Users will receive error messages if the OBI Publisher Credentials are not completed.



The screenshot shows the 'Insbridge Explorer' configuration window. On the left is a tree view with folders: Insbridge, SoftRater, Engine, Explorer (selected), SoftData, Services, Logs, Security, SoftLibraries, and Help. The main area is titled 'Configuration File [C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\Web\IBFA\System\SoftRater\Xml\rnx.xml]'. Below this is a text area for 'Admin Email Address'. Then, 'Internet Proxy' is set to 'None'. 'Intranet Credentials' are set to 'Use Anonymous'. At the bottom, the 'OBI Publisher Credentials' section is highlighted with a red box, containing 'UserID' and 'Password' input fields. A 'Save' button is at the bottom left.

Figure 27 OBI Publisher Credentials

1. On the left side menu, select SoftRater-> Explorer.
2. Locate the OBI Publisher Credentials.
3. Enter the default user name and password.

User ID: Administrator
Password: Administrator
4. Click Save to save your entry. You must click Save prior to exiting the page.

Updating OBI Publisher Password

You can immediately update the OBI Publisher password if you want. The password must be updated in OBI Publisher and then in IBFA.

1. Enter the OBI Publisher console. <http://localhost:9704/xmlpserver> where localhost is the machine where IBFA/RM is installed.
2. Select the Admin tab.
3. Under Security Center, select Users.
4. Select the administrator Username.

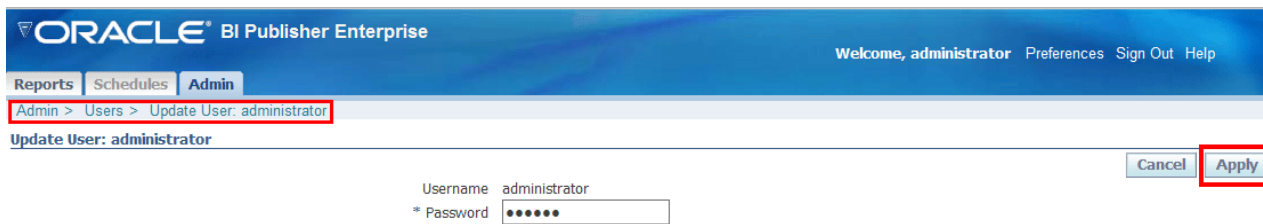


Figure 28 Updating the OBI Publisher Password

5. Enter in a new password and click Apply. This updates the Administrators password.
6. Sign out of OBI Publisher.
7. Enter IBFA.
8. Open the SoftRater Explorer Configuration window. Enter the same password in the OBI Publisher Credentials.
9. Click Save. The password has been updated.

STEP 6 – STARTING INSBRIDGE SERVICES

The Insbridge Message Service can be started on the server where Insbridge is installed or from the Services screen in IBFA.

To start on the server go to Services and select to start Insbridge Message Service.

To Start in IBFA:

Insbridge Message Service

The Insbridge Message Service is a Message Queue Listener that will route all batched messages to an assembly (process) for execution. These processes may take resources and time to execute. Please consult with you system admin before configuring the number of listeners per process.

Message Process

Batch Rating

If you see this message, you have not requested a listing from the selected spoke client. Clicking View Messages will provide you with a list view of the first in - first out messages that are waiting to execute.

Insbridge Task Manager

The Insbridge Task Manager gives you the ability to execute daily, weekly, hourly, or by the minute.

(This process may take a while to execute)

| TASK | LAST RUN-DATE | START-TIME | STATUS |
|------|---------------|------------|--------|
|------|---------------|------------|--------|

Figure 29 Insbridge Services Screen

1. In **IBFA**, navigate to the **Services** page.
2. Next to Insbridge Message Service, click **Start**. After a few seconds, the buttons will refresh to indicate that the service is started.
3. Next to Insbridge Task Manager, click **Start**. After a few seconds, the buttons will refresh to indicate that the service is started.

It is recommended that you also start the Insbridge Task Manager. The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status.

NOTE: A login screen is displayed on IBFA for new installs. An upgrade does not reset the current security setting. For example, if a login was not required for IBFA, upgrading to release 05.01.00 will not change that.

STEP 7 – UPDATING DATABASES

Database updates can be performed in RateManager for the IBRM, IB_Client and Reporting databases. This is the recommended way to update these databases. If this is not possible, the databases can be updated manually on the machine where they are located.

The SoftRater database needs to be updated manually on the machine where it is located.

To update the IB_Client, IBRM and Reporting databases, log into RateManager.

NOTE: *You must be a DB Owner to run the update scripts in RateManager.*

Updating Databases in RateManager

The URL for RateManager will be <http://INSTALLATIONSERVERNAME/RM>. Where Installation server is the server where RateManager was installed. This places you on the RateManager login screen.

If you log into RateManager and Tools is the only option, you must perform a database update.

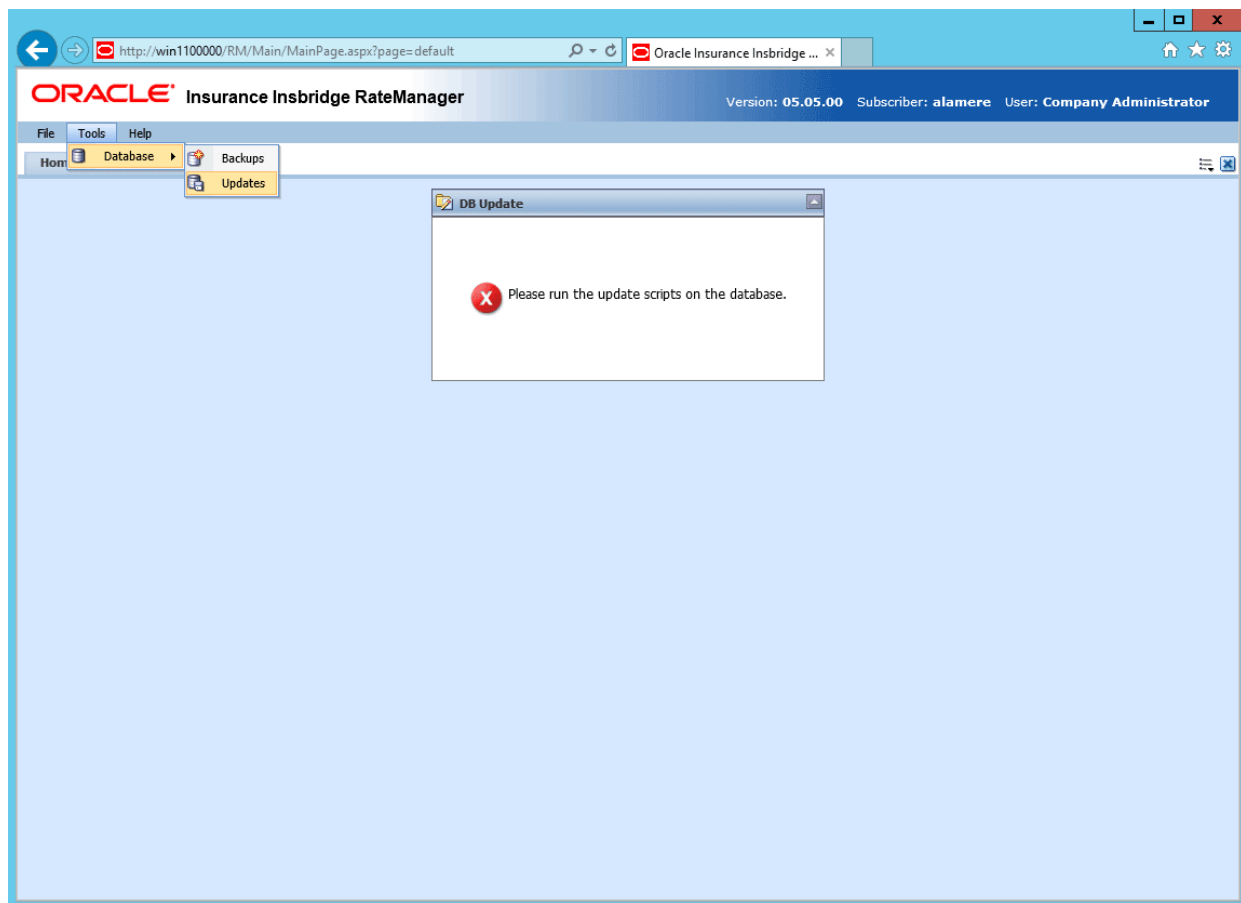


Figure 30 Tool Mandatory Update

1. Enter your username and password.
2. Navigate to the **Tools→Database→Updates**.

On the DB Updates screen, the current version is highlighted and the status is *Current*. The updates below the current version are grayed out. These updates cannot be run again. You will receive an error message if you attempt to run a lower version update. Any version update above the current version will also be grayed out but will be available for executing.

Updates have to be installed sequentially, meaning if you are on Version 03.13, you must run the 04.00 update, the 04.01 update, the next, and finally the 05.01.00 update. If you attempt to run an update that is more than one level above the current version, you will receive an error message.

3. The **Updates** tab is displayed. Select the database you want to view from the **Show updates for** drop down. The database updates for your selection are listed. The last column, the **Status** column, shows you which update is the **Current** one installed.

ORACLE Insurance Insbridge RateManager

File Modules Tools Help

Home DB Updates x

DB Updates

Execute Update Script Open Update Script Save Update Script to File Refresh

Show updates for: IBRM

| Script | Release Date | Database | Status |
|--------------|--------------|----------|----------------|
| v05.05.00.00 | 6/1/2017 | IBRM | |
| v05.04.00.00 | 12/31/2016 | IBRM | Current |
| v05.03.00.00 | 10/31/2016 | IBRM | |
| v05.02.00.00 | 6/1/2016 | IBRM | |
| v05.01.00.00 | 12/15/2015 | IBRM | |
| v05.00.00.00 | 4/1/2015 | IBRM | |
| v04.09.00.00 | 11/1/2014 | IBRM | |
| v04.08.00.00 | 4/1/2014 | IBRM | |
| v04.07.00.00 | 3/1/2013 | IBRM | |

Figure 31 Available Updates

4. There are two ways to execute an update:
 - a. **Directly in RateManager**
 - b. **In SQL Server**

Directly in RateManager

This is recommended way to update a database. It is recommended that you start by selecting the update showing Current. This assures that the database showing as Current has all possible updates.

Database scripts must be run in this order: IB_CLIENT, IBRM and Reporting, Reporting must be last.

1. Highlight the update you want to run.
2. Click **EXECUTE UPDATE SCRIPT**. A warning message is displayed.
3. Click **OK** to run the update or **Cancel** to return to the previous screen.
4. Run all script in consecutive order until the 5.6.1 script is showing as current.
5. Run scripts in this order: IB_CLIENT, IBRM and Reporting. **Reporting must be the last script run.** Do this for all database update scripts.

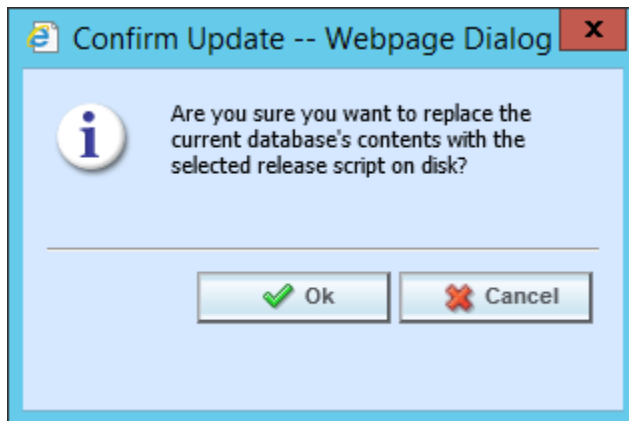


Figure 32 Updating Scripts in RateManager

6. Click File→Reload to refresh the system

In SQL Server

This method should be performed by a database administrator. No warning messages are displayed if you execute scripts in the wrong order. You must know the name of the databases you are updating. Please see **Manual Updates to the Insbridge Database**.

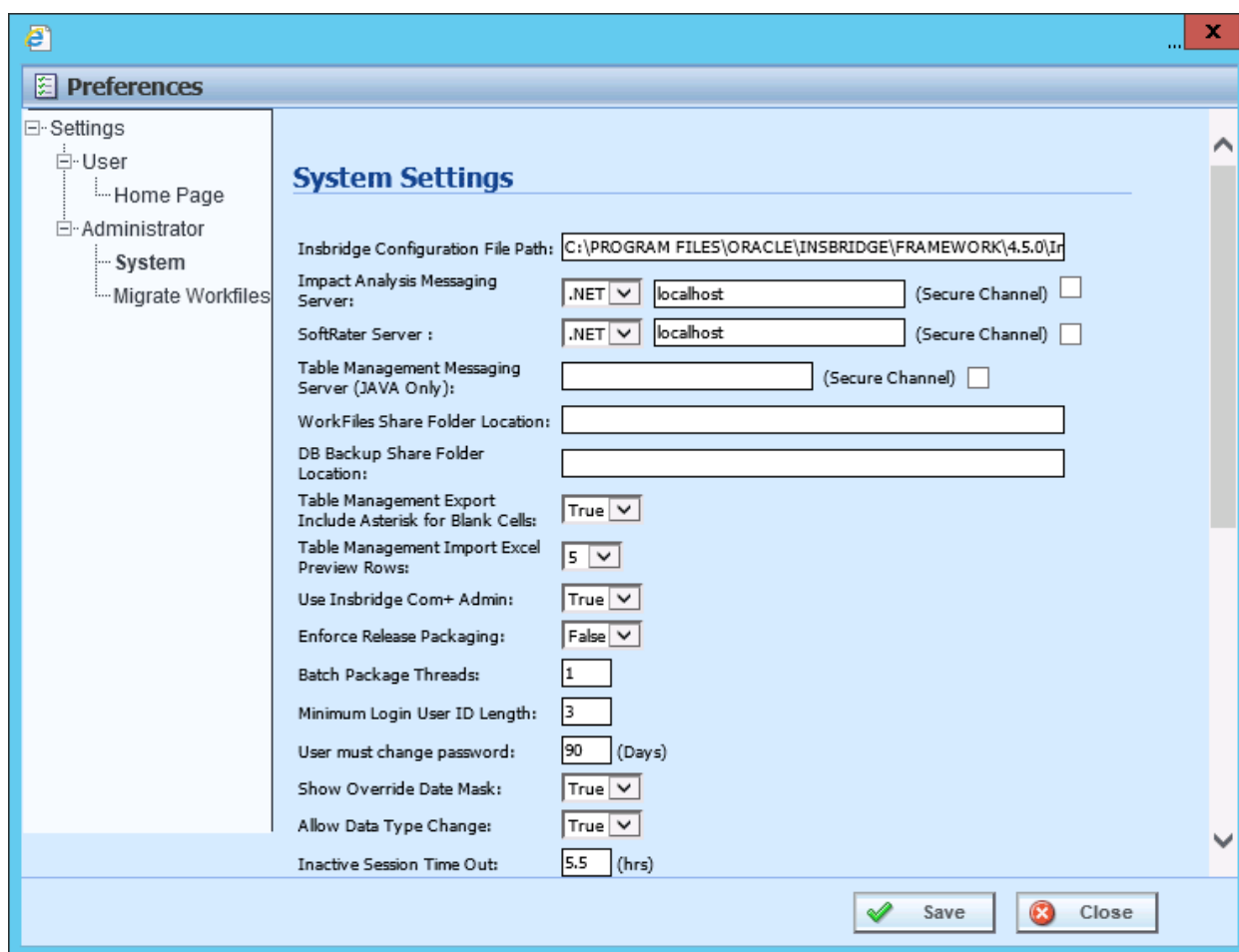
After you perform the database updates, to view all menu options, click File→Reload.

STEP 8 – UPDATING PREFERENCES

Administrators can edit web settings at any time from the Preferences option in RateManager. Changes will 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. Prior to users accessing RateManager for the first time, it is recommended that Preferences be set.

To Change Settings

1. Select Tools→Preferences. This opens the **Preferences** window.
2. Select **System**. This option is displayed only if you are an administrator.



The screenshot shows the 'Preferences' window with the 'System Settings' tab selected. The left sidebar contains a tree view with 'Settings' expanded, showing 'User', 'Administrator', and 'System' (which is highlighted). Below 'System' is 'Migrate Workfiles'. The main area is titled 'System Settings' and contains various configuration options:

- Insbridge Configuration File Path: C:\PROGRAM FILES\ORACLE\INSBRIDGE\FRAMEWORK\4.5.0\Ir
- Impact Analysis Messaging Server: .NET (dropdown), localhost (text), (Secure Channel) checkbox
- SoftRater Server: .NET (dropdown), localhost (text), (Secure Channel) checkbox
- Table Management Messaging Server (JAVA Only): (text), (Secure Channel) checkbox
- WorkFiles Share Folder Location: (text)
- DB Backup Share Folder Location: (text)
- Table Management Export Include Asterisk for Blank Cells: True (dropdown)
- Table Management Import Excel Preview Rows: 5 (dropdown)
- Use Insbridge Com+ Admin: True (dropdown)
- Enforce Release Packaging: False (dropdown)
- Batch Package Threads: 1 (text)
- Minimum Login User ID Length: 3 (text)
- User must change password: 90 (Days) (text)
- Show Override Date Mask: True (dropdown)
- Allow Data Type Change: True (dropdown)
- Inactive Session Time Out: 5.5 (hrs) (text)

At the bottom right are 'Save' and 'Close' buttons.

Figure 33 Preferences Settings

3. Make any necessary changes. If you do not know all the settings, you can come back and edit at a later time. It is recommended that you update the **ONLINE HELP Server** immediately.
4. When you are finished, click **SAVE** to update your settings. If you want to changes to take place immediately, you may have to end all user sessions.

System Setting Options

Insbridge Configuration File Path

The path of the configuration file found in IBFA. This pathway must match the IBFA path. You may need to change this path if you have changed the path in IBFA. Please contact Insbridge support for further information.

It is strongly recommended that you leave the default.

Impact Analysis Messaging Server

Impact Analysis is set up to run on the same server where RateManager is located. The Impact Analysis Messaging Server setting allows for select SoftRater instances to be used when running scenarios through Impact Analysis. Only an Insbridge SoftRater Server (IBSS) utilizing an Oracle database can be entered. When an IBSS instance utilizing an Oracle database is entered, the environments on the instance will populate Impact Analysis and Impact Analysis will query against the Oracle database. If an IBSS utilizing another database type is entered, no environments will be populated.

To use an IBSS instance with an Oracle database, select the server type Java (For SoftRater for Apache TomEE) and enter the IBSS URL.

If localhost is used, Impact Analysis runs queries against the disk where batch files are stored. The server type must remain .NET. The default value is to remain on the RateManager server.

SoftRater Server

If you need to rate on another server, you will have to change server locations here. It is strongly recommended that you leave the default.

Table Management Messaging Server (JAVA ONLY):

Table exports require a Java instance. If you want to use the Table Management feature, you must enter an Insbridge Java server location. Format requires the port number being used but does not require preceding slashes. DNSname:port or IPAddress:port

If you do not enter a valid Insbridge Java server location, table exports will not work.

Work Files Share Folder Location

A shared Workfiles location allows for multiple instances of RateManager to share the same Workfiles. The Insbridge server and the shared location must be on the same domain. The Insbridge user must be on the domain also.

For instructions on setting up a WorkFiles Share Location, please see the Insbridge WorkFiles Installation Guide on the <https://docs.oracle.com/en/industries/insurance/index.html>

DB Backup Share Folder Location

When you make backups of the RateManager database, you can specify the location of the backup file. If the location is local, use a local path. If the location is not local, you must be a disk admin to change.

If the database is on a remote server, a share is needed for the backup location. The Insbridge user must have write access to this location as well.

Table Management Export Include Asterisk for Wildcard

When the Table Management Export Include Asterisk for Wildcard option is set to True, an asterisk is inserted for wildcard null values. This is automatic in tab-delimited exports. For Excel exports, the option is activated but can be overridden.

Table Management Import Excel Preview Rows

Select the number of rows available for preview when importing table data from MS Excel. Available in increments of 5, 10 or 20 rows.

Use Insbridge Com + Admin

This setting must always be true. If there is a conflict, please contact Oracle Insurance support.

Enforce Release Packaging

When set to **False**, a release is not required in order for users to create a SoftRater (full) package. False is the default setting.

If set to **True**, a release is required in order for a SoftRater (full) package to be created. If a user wants to create a SoftRater (full) package in the Program Explorer module, a release must be created in the Releases area first. This release must have the program added to it and be unlocked. When the user creates the SoftRater package in Program Explorer, they will have the option to select the Release they want this package to be placed into. If there is no release, or no release that contains that program and is unlocked, then the user will be able to do RateManager (local) packages only.

Batch Package Threads

RateManager allows you to change how many threads are used. Threading enables a process to finish faster by splitting the process into smaller processes that run quasi-simultaneously. On multiprocessor systems, using multiple threads enables the operating system to assign the threads to different processors.

In addition, the Framework Administrator also enables you to change the administrator email address for each client. When a process fails, an email will be sent to the person who initiated the process, as well as to the administrator email addresses listed for the client of that process.

NOTE: *Before changing the number of threads, you should consult with your system administrator. Setting the number too high can result in poor performance or even a system crash. If you are unsure of how many threads to use, set the number to 1. For single processor systems, Oracle Insurance recommends a maximum of 2 threads.*

Minimum Login User ID Length

This is the minimum number of characters required for a user ID.

User must change password

This where you set the number of days before a user is required to change his/her password. This setting will only be active when you elect to have users change their password on the user setup screen.

Show Override Date Mask

If enabled, a date mask for 'Date' data types will be displayed when importing a table. If not enabled, this field will not be visible.

Allow Data Type Change

The type of data associated with a parameter. RateManager supports three (decimal, integer and string) data types for variables and inputs and a fourth (date) for inputs and result variables only.

Setting this option to True allows RateManager users change the data type of a variable or input. Setting this option to False does not allow users to change data types.

Inactive Session Time Out

This is the amount of time that a user sits inactive before being automatically logged out of the system.

Batch Results with New Line

Allows batch results to go to a new line instead of forming one continuous string. A True setting places a carriage return between result files. A False setting results in one continuous string without a break.

Online Help Server

Online help is installed with RateManager. This setting is the default server name where RateManager currently resides. Either a server name or an IP address can be entered here. If needed, you can change the name of the server. For example, if the machine name is not the same as the host name, you may need to change the name in order for online help to function.

My Recent List

My Recent List is a snap setting. Snaps are modules that contain information or links to elements that the user recently worked on. You can set the maximum number of elements to display in a snap. The default is for the snap list to be limited to 10.

Default Proxy Script Location

The Default Proxy Script Location setting may be needed if you elect to use the Oracle Insurance Blog Feed snap. This setting can be used for RSS feeds.

Change Control

If change control is on, it is mandatory for users to enter a change control entry and justification to any element or program when it is revisioned. If change control is off, the option is not presented.

Maximum Amount of Simultaneously Opened Tabs

Use the maximum amount of simultaneously opened tabs setting to set the maximum number of tabs you allow users to have opened in RateManager. The default is 15.

Debug Report Format

Select the debug report format to be used in the Test Program section of RateManager. Debug reports can be a single report format, where the entire report is listed out or in a summary report format where information is contained in sections that can be expanded and collapsed. Summary report format may be useful if large programs are to be run. This setting can be updated at a later time.

Default Naming Standard

Select the Naming Standard to be applied system. If a Naming Standard is not needed system wide, clear the field. The default is for the system default to be used. Please see Naming Standards for more information.

Enable Worksheet for Test Case Editor

Select true to have the option to create a rating or calculations worksheets in Test Case Editor. Select false and the option to create a worksheet in Test Case Editor is not presented. Please see Worksheets for more information.

Product Configuration Server

Enter in the location of Product Configuration. Product Configuration (PC) is a business modeling tool that allows you to create a reusable hierarchical schema that defines your insurance products. An entry in

this field enables the PC domain type and allows for updates to be brought in to RateManager. Leaving the field blank disables the PC domain type.

Enforce Product Configuration

This option mandates that all content come from Product Configuration. Product Configuration (PC) is a business modeling tool that allows you to create a reusable hierarchical schema that defines your insurance products. When set to true, only the PC domain type is available, The RateManager or Other domain types cannot be used.

Reporting Threads

Enter the number of threads to be used for reporting. The field is initially blank and the system will default to a single thread. Entering a value higher than the default may result in better system performance. Reports may run faster as you approach an optimal thread count. The thread count is based on the hardware capabilities (number of CPU cores and memory) of the server. A high thread number does not necessarily warrant a faster performance. You should analyze how much data you need to process and the capabilities of your server to get to an optimal number. A value does not have to be set.

Global Versions Report Threads

Enter the number of threads to be used for global version reports. The field is initially blank and the system will default to a single thread. Entering a value higher than the default may result in better system performance. Reports may run faster as you approach an optimal thread count. The thread count is based on the hardware capabilities (number of CPU cores and memory) of the server. A high thread number does not necessarily warrant a faster performance. You should analyze how much data you need to process and the capabilities of your server to get to an optimal number. A value does not have to be set.

STEP 9 – UPDATING GROUP RIGHTS

If you are upgrading from a release prior to 05.00.01, you will need to update permissions. A new schema was introduced in 05.00.00. It contains new levels within RateManager and changes to permissions. Previous settings will be carried over but new levels require that administrators update permissions.

New features have also been added that require permissions to be set. Administrators will have permissions automatically assigned.

To Update Rights

1. Navigate to the Tools→Security→Group Management tab and select the group whose rights you want to edit. Click **Rights**.
2. The Group Rights window is displayed.

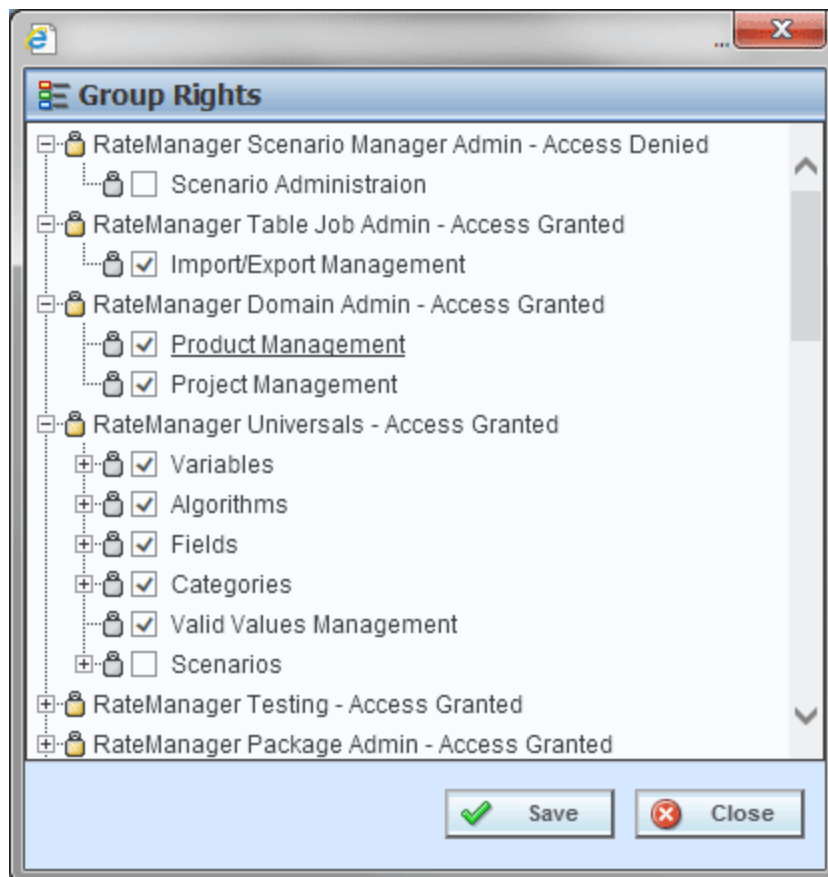


Figure 34 Assigning Group Rights

3. Changes to rights:

- a. Universals is a new level in RateManager. Universal rights allows users to manage elements for the project level. Also at this level is categories and field inputs. Without universal rights, users will not be able to create field inputs or manage categories.
- b. Domain admin rights have updated rights. To select products for projects, users must have both project and product level permissions. Users may have these rights if they previously had line and subline rights.
- c. Table Job Admin is a new feature that allows users to export table data into an Excel workbook. Permissions must be granted to allow users access to Table Job Management, to edit, delete and start jobs.
- d. Valid Values Management is a new feature in Universals that allows users to create, edit and delete validations in any domain.
- e. Valid Values Revision Selection is a new feature in the product permissions that allows users to select the active revision of a validation.
- f. Scenario Managers is a new feature that allows users to create, edit, and delete scenarios. Scenarios hold selected tables from selected programs. Scenario Managers also need permissions in the products that are to be added to scenarios.
- g. Scenario Users is a new feature in the product permissions that allows the user to edit the tables that have been added to a scenario.
- h. Users with releases rights now require product rights as well. Programs cannot be selected for a release unless the user has rights to the product where the program resides.

For more details on rights, please see the RateManager User Guides Tools Menu.

- 4. Assign rights to the group as needed. Expand the appropriate section and place a check next to an item to give the group access to that section.
- 5. Scroll through the rights and verify that the group has the rights that are required.
- 6. When you are finished making changes, click Save.

STEP 10 – SEND NOTICE TO RM USERS TO CLEAR IE

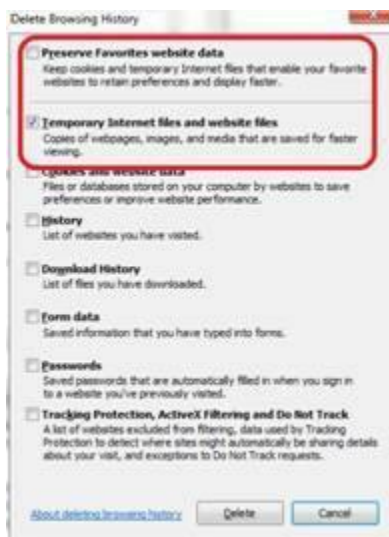
Some users may experience issues with RateManager after an upgrade. This may be due to temporary internet files remaining in cache. These files are called and since they are not compatible with the newer version of RateManager, an error message is displayed.

This issue may be a more prevalent with users upgrading from a 4.9 release or earlier.

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.

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.

OPTIONAL STEPS

There are optional steps that can be performed for a RateManager/IBFA update.

Migrating Files

- **Step 1:** Migrate Files
- **Step 2:** Update Portal URL

These steps may not be required, depending upon the actions you want to take.

MIGRATE WORK FILES

This option migrates workfiles from previous versions of RateManager. This procedure is for updates from release 4.8 or previous or if you are updating to a new machine.

STEP 1 – MIGRATE WORK FILES

Migrating workfiles assures that previous workfiles are available to users. Workfiles are rating, pricing, mapping and template files used in various areas of RateManager such as Impact Analysis, Library, and Testing. Migrating files allows users to access work files that were available in previous releases of RateManager. If you do not migrate work files from previous versions, users will not have access to them.

Work files should be migrated after the upgrade has been run.

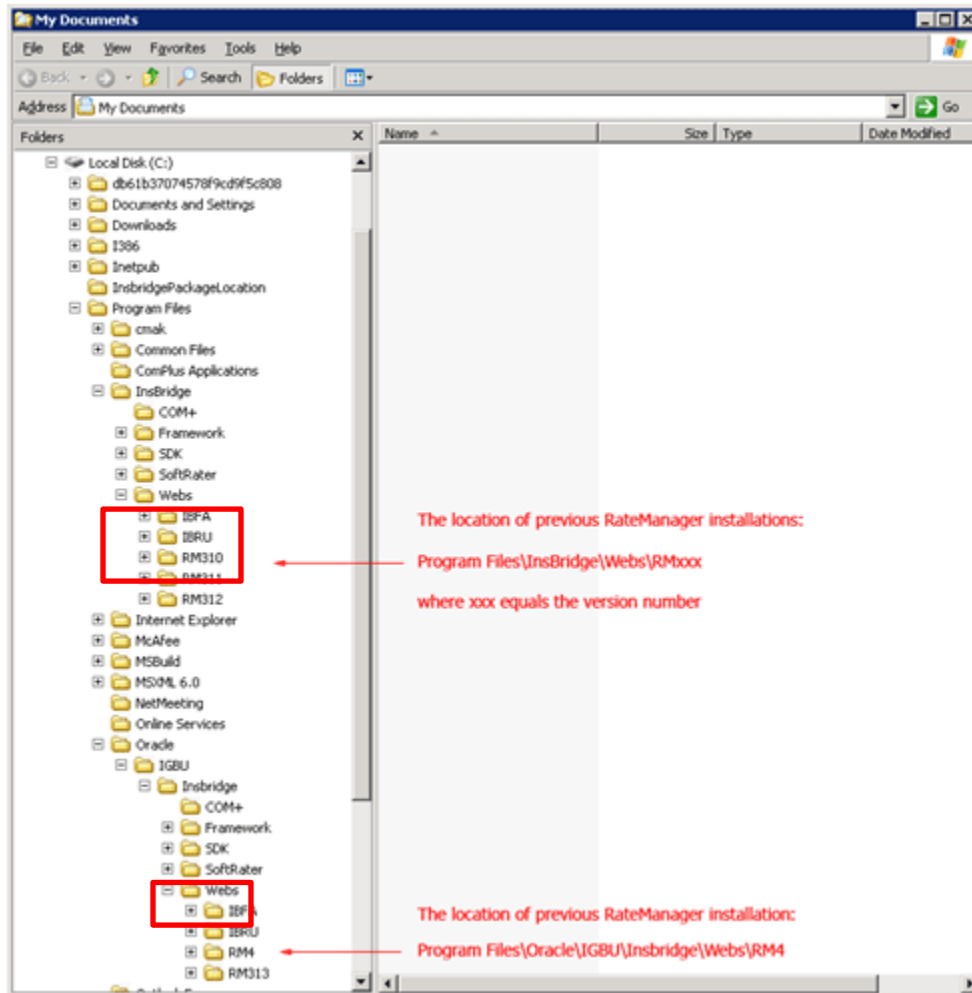


Figure 35 Location of WorkFiles

Prior to migrating files, please create backup copies of the files to be migrated. This requires access to the server where RateManager has been installed.

Migrating files is a two-step process.

Step 1: Locate the previous workfiles to be migrated.

The location of the files to be migrated and the exact file name will depend upon what version of RateManager you want to migrate. There are four possible locations.

For Release 3.12 and earlier:

- **File Name:** WorkFiles
- **Location:** \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:** \Program Files\Oracle\IGBU\Insbridge\Webs\RM313\Workfiles

For Release 4.0 To 4.8:

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

For Release 4.9:

Use only if moving to new server.

- **File Name:** Workfiles
- **Location:** \Program Files\Oracle\Insbridge\Webs\RM4\Workfiles

Copy all work files for every version to be migrated and store in a safe location. In the unlikely event that an error with the migration occurs, you will have backup files that you can place directly in the RateManager (RM4) Workfiles location or restore to the previous version.

Step 2: Place copies in the new workfiles location.

New File Location

- **File Name:** Workfiles
- **Location:** \Program Files\Oracle\Insbridge\Webs\RM4\Workfiles

Manual Migration

Migrations must be performed manually. If you are working with two separate machines, you must perform the migration manually. If you have more than one version where you want to migrate files, you will have to perform the migration manually.

DO NOT USE RATEMANAGER TO MIGRATE MULTIPLE VERSIONS. Only one version can be migrated. If you attempt to migrate more than one version, you will write over any data with the version that you are migrating. For example, if you migrate version 3.12 and then migrate 3.13, any information from 3.12 will be written over with the information from 3.13. If you have more than one version to migrate, you must perform the migration directly on the server.

Verifying the File Migration in the Server

Migrated files will be moved from previous releases into the updated location - \\Program Files\Oracle\Insbridge\Webs\RM4\Workfiles.

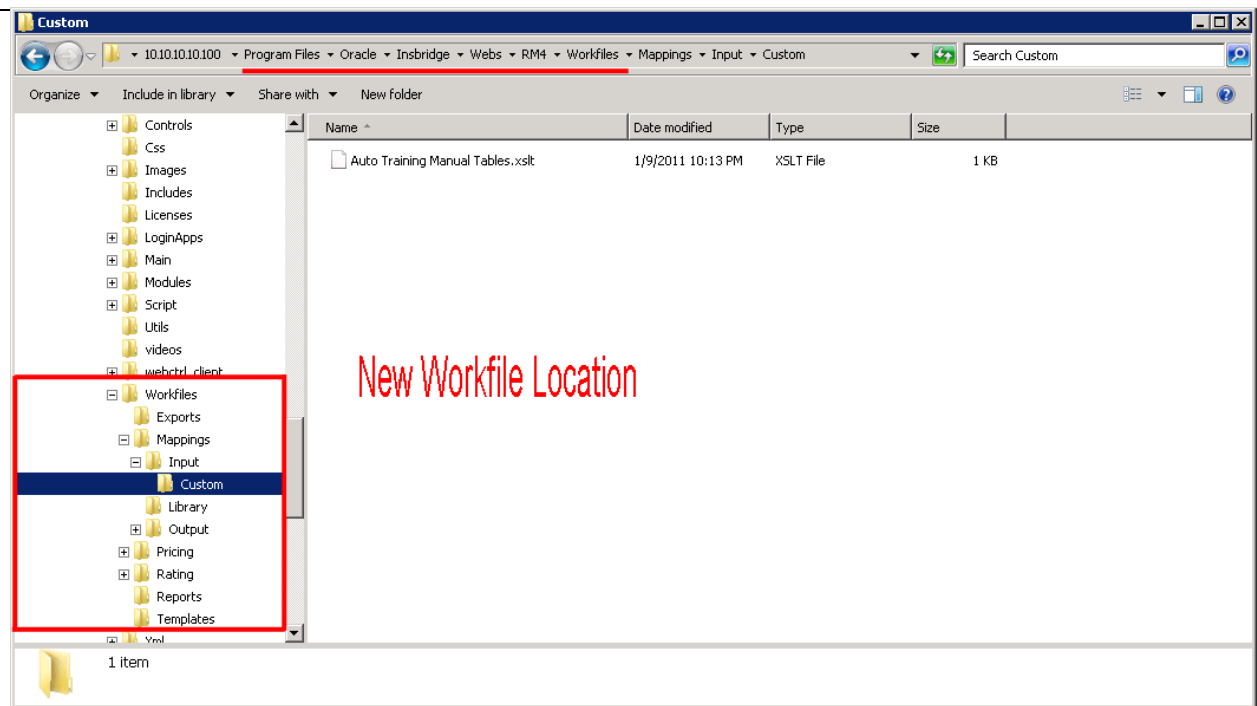


Figure 36 Verifying File Migration at Server Level

You can verify that files have been moved by looking in the
 \Program Files\Oracle\Insbridge\Webs\RM4\Workfiles folder.

You also can verify that previous WorkFiles have been removed by looking in the prior WorkFiles location on the server. Workfiles only need to migrated one time.

Verifying Migrated Files in RateManager

Migrated files are available in the same areas.

To verify that work files from a previous version have been migrated, enter an area where these files would be used, such as the Library tab.

The tab refreshes with all available files. Your files from previous versions will be listed.

NOTE: Previous export files should not be migrated. Previous export files are not recognized in current releases of RateManager.

UPDATE PORTAL URL

The Oracle Insurance Insbridge Enterprise Rating Portal (Portal) is a single point of access to the Oracle Insurance Insbridge Enterprise Rating (Insbridge) system. If you are using a portal, the URL must be updated to reflect to new application pool settings. The previous extension of IBRU will not work.

The portal can now be accessed from `http://LOCALHOST/insbridge`

Where: LOCALHOST is the server where the Insbridge system is installed.

To Update

Step 1: Locate previous portal settings.

Step 2: Copy from previous portal to new portal.

Step 3: Update URL to insbridge

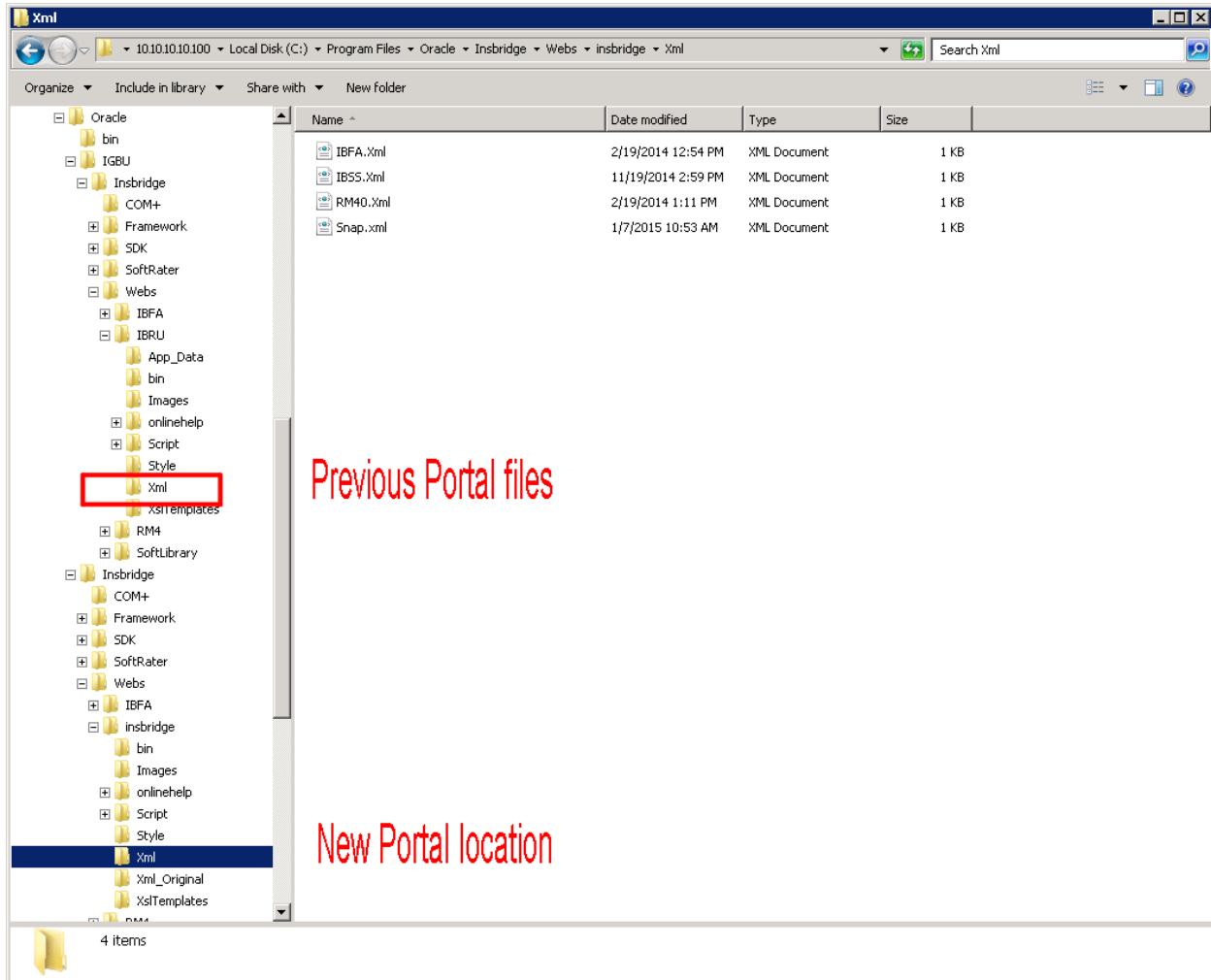


Figure 37 Portal Locations

Step 1: Locate previous portal settings.

The location of the files to be copied and the exact file name will depend upon what version of RateManager you want to copy. There are three possible locations.

For Release 3.12 and earlier

- **File Name:** Xml
- **Location:** \Program Files\InsBridge\Webs\IBRU\Xml

For Release 3.13 to 4.8.X

- **File Name:** Xml
- **Location:** \Program Files\Oracle\IGBU\Insbridge\Webs\IBRU\Xml

For Release 4.9.X

Use only if moving to new server.

- **File Name:** Xml
- **Location:** \Program Files\Oracle\Insbridge\Webs\IBRU\Xml

Copy all four XML files and store in a safe location. In the unlikely event that an error occurs, you will have backup files that you can work with.

Step 2: Copy from previous portal to new portal.

New File Location:

- **File Name:** Xml
- **Location:** \Program Files\Oracle\Insbridge\Webs\insbridge\Xml

Step 3: Update URL to insbridge to reflect the application name of insbridge.

Portal Security

Security has been added to the Insbridge webs. A valid username and password will be required to access the portal unless Windows Authentication has been turned off. If Windows Authentication has been turned off, users will be required to log in to RateManager with their username and password. To allow access to the portal without requiring a login, users must be network users on the machine where Insbridge is installed.

Portal Access

The portal can be accessed from <http://LOCALHOST/insbridge>

If you wish to re-create the portal or want more information, please see the *Insbridge Enterprise Rating Portal Configuration Guide*.

UPGRADING TO A NEW MACHINE

If you are upgrading RateManager/IBFA from any previous release **AND** moving to a different machine you will need to perform these steps. These steps will allow any packages loaded to the old machine to be loaded and used by the new machine. If you do not perform these steps, old packages may not rate properly or even be available to users.

NOTE: *These steps need to be done **only** when you are migrating your RateManager/IBFA instance from an old machine to a new machine.*

- **Step 1:** Install RateManager/IBFA
- **Step 2:** Export the Insbridge Registry Key from the old Machine
- **Step 3:** Import the registry key from the old machine to the new machine
- **Step 4:** Copy the Insbridge XML file from the old machine.
- **Step 5:** Paste the Insbridge XML file in the new machine.
- **Step 6:** Finish the Installation
- **Step 7:** Run any needed Database Client – Optional
- **Step 8:** Manually Migrate Workfiles
- **Step 9:** Update Portal if necessary
- **Step 10:** Send notice to RM users to completely clear cache, including Preserve Favorites website data.

After these steps, your RateManager/IBFA should be ready for use.

Step 1: Install RateManager/IBFA

A RateManager/IBFA upgrade that involves moving to a new machine is considered a new install. Please follow the instructions for installing RateManager/IBFA in the *RateManager Installation Guide*.

STOP At Step 7 – Configuring Insbridge Framework Administrator.

Do not create a subscriber or environments.

Step 2: Export the Insbridge Registry Key

The Insbridge registry key located in HKEY_LOCAL_MACHINE\SOFTWARE\Insbridge is used to store all information for proper encryption of the SoftRater Packages (SRPs).

When RateManager/IBFA is re-installed on a new server, a new registry key will be created. The new registry key will not match the registry key associated with any packages that have been created on the old machine. In order to load packages to the new machine, you will need to restore the previous registry key.

1. On the old machine, enter Registry Editor. Run→regedt32.
2. Select the Insbridge key: HKEY_LOCAL_MACHINE→SOFTWARE→Insbridge.
3. Right click and select **Export**.
4. Select a storage location for the file and **Save**.
5. Close out of Registry Editor.

Step 3: Importing the Registry Key

The old registry key needs to be imported in to the new machine.

1. **Save the Exported Registry Key** to a location you can easily access.
2. **Double click the Exported Registry Key.** The key will be loaded.
3. Store the Exported Registry Key in a safe location.

Step 4: Copy the Previous Insbridge.XML File

You can copy and paste the Insbridge XML file from the old machine to the new machine. This will allow the environments and subscriber created in the old machine to be populated in the new machine.

NOTE: If you want to re-enter or re-create your environments, you can skip Step 4 and Step 5. After you import the registry key, you will need to continue the RateManager/IBFA installation at Step 7 – Configuring Insbridge Framework Administrator.

File Location

The location of the Insbridge.XML file to be copied will depend upon what version of RateManager the old machine is running. There are three possible locations.

For Release 3.12 and earlier:

- **File Name:** InsBridge.XML
- **Location:** D:\ProgramFiles\InsBridge\Framework\2.0.2\InsBridge.Xml.
OR C:\Program Files\Oracle\Insbridge\Framework\2.0.0\Insbridge.Xml

For Release 3.13 to 4.8.X:

- **File Name:** InsBridge.XML
- **Location:** C:\Program Files\Oracle\IGBU\Insbridge\Framework\3.5.0\Insbridge.Xml

For Release 4.9.X:

- **File Name:** InsBridge.XML
- **Location:** C:\Program Files\Oracle\Insbridge\Framework\4.5.0\Insbridge.Xml

Copy the Insbridge.XML file to a location you can easily access.

NOTE: If you are changing databases, you can copy and paste the Insbridge XML file, however you will need to update your environments with the new database information.

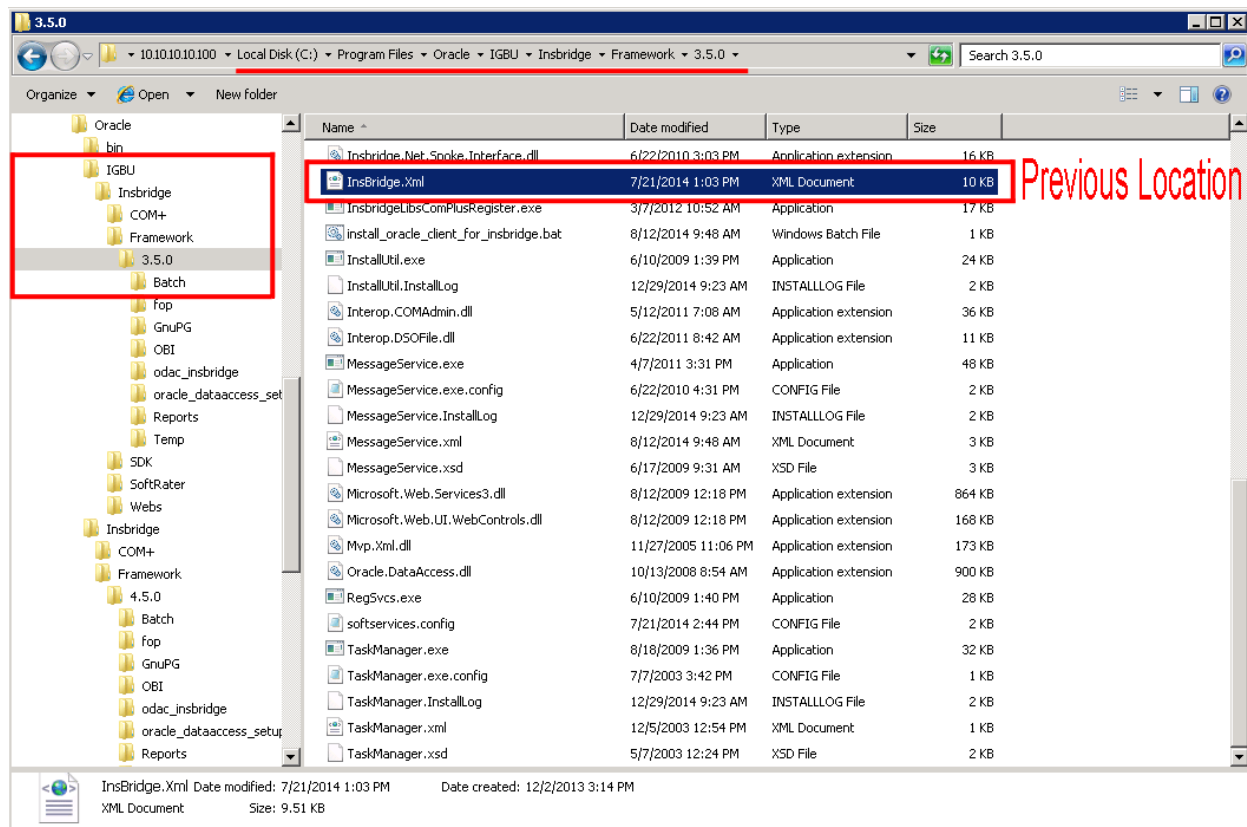


Figure 38 Previous Config.xml file Location

Step 5: Paste the Insbridge.XML File

Before pasting the Insbridge.XML file into the new location, make a copy of the blank Insbridge.XML file

Upgrade Guide

and store in a safe location. In the unlikely event that an error occurs, you will have a backup file that you can use.

The Insbridge.XML file in the New Machine is located:

C:\Program Files\Oracle\Insbridge\Framework\4.5.0\Insbridge.Xml

1. Make a copy of the blank Insbridge.XML file on the new machine and store in a safe location.
2. Paste the Insbridge.XML file from the old machine in to the new machine in the same location.
3. Open an Internet Explorer web browser either remotely on the local Insbridge web server and browse to IBFA location on the new machine: <http://SERVERNAME/ibfa/>
4. Subscribers and Environments should be available in IBFA on the new machine. Verify your entries.

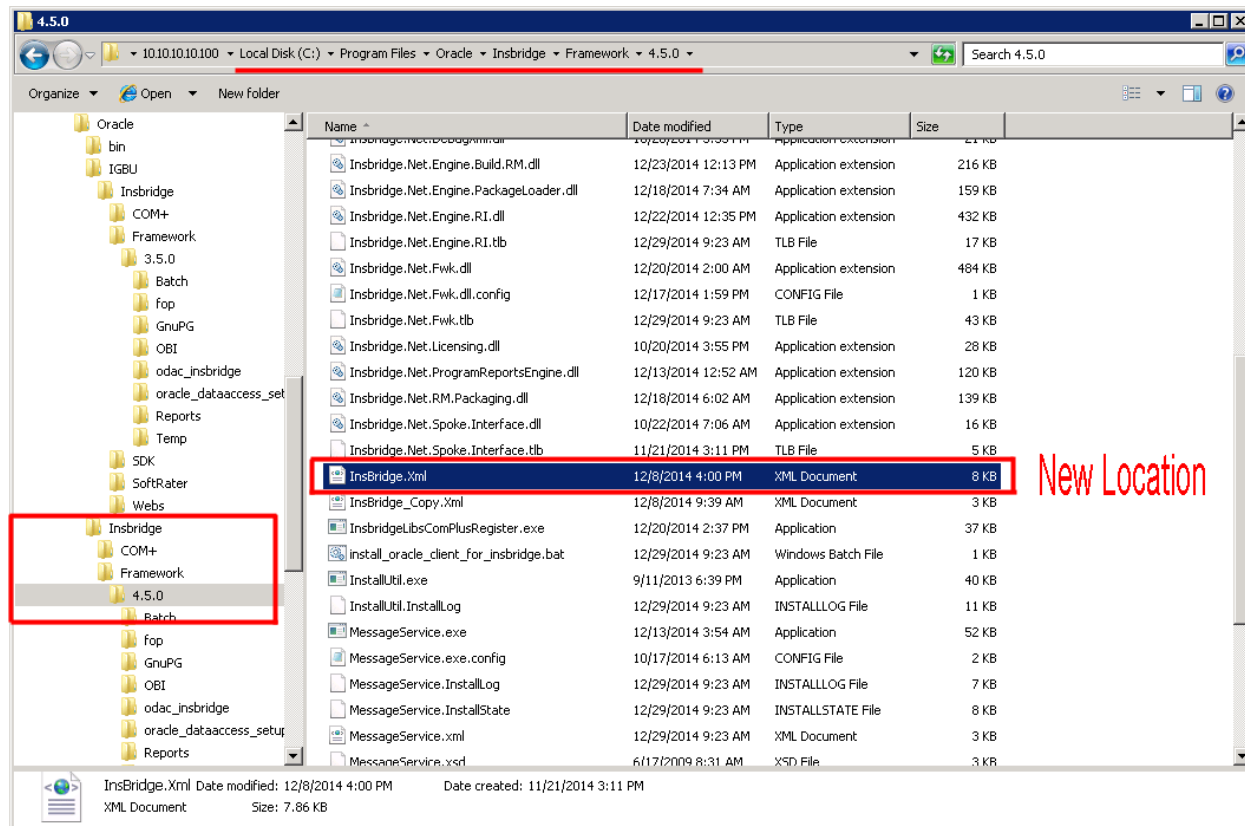


Figure 39 New Config.xml File Location

Step 6: Complete the RateManager/IBFA Installation

Complete the instructions for installing RateManager/IBFA. Please see the *RateManager Installation Guide* for detailed instructions.

Continue at Step 8 – Verifying the Component Services. You will need to complete the rest of the installation.

Step 7: Run Database Clients – Optional

This step is optional. You will need to run the Oracle Client if you are utilizing a Java SoftRater, i.e. SoftRater for Apache TomEE. The Oracle Client is located in the Oracle Cloud Delivery package for 5.6.0. For instructions on running the Oracle Client, please see the corresponding SoftRater Installation Guide, i.e. SoftRater for Apache TomEE Installation Guide. Please make sure you use the 64-bit client.

Step 8: Manually Migrate Workfiles

After the installation has been completed, you will need to migrate workfiles. Follow the instructions for Manually Migrating Workfiles, see page 73.

Step 9: Update Portal Settings

If an Insbridge portal is being used, the URL and security settings may need to be updated. Follow the instructions for Updating a Portal, see page 76.

The RateManager system is ready for use.

NOTE: *If users experience any difficulties with migrated packages, please verify that the database usernames and passwords are entered for any SoftRater environment.*

Step 10: Send Notice to RM Users to Clear IE

Some users may experience issues with RateManager after an upgrade. This may be due to temporary internet files remaining in cache. These files are called and since they are not compatible with the newer version of RateManager, an error message is displayed.

This issue may be a more prevalent with users upgrading from a 4.9 release or earlier.

Display Issues When Upgrading from Previous RateManager Release

If users 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.

IMPORTING REGISTRY KEY AFTER INSTALLATION

The registry key can be imported at any time after the initial RateManager/IBFA install and subscriber creation. If the registry key needs to be imported after you have completed the installation and set up your SoftRater environments, you will need to re-enter Database Username and Passwords for the SoftRater Environments.

This procedure is only required if you have configured your environments. If you have not configured your environments, you should not have to re-enter usernames and passwords for your environments.

Prior to starting, IBFA should be up and running on the new machine.

Step 1: Export the Insbridge Registry Key

The Insbridge registry key located in HKEY_LOCAL_MACHINE→SOFTWARE→Insbridge is used to store all information for proper encryption of the SoftRater Packages (SRPs).

When RateManager/IBFA is re-installed on a new server, a new registry key will be created. The new registry key will not match the registry key associated with any packages that have been created on the old machine. In order to load packages to the new machine, you will need to restore the previous registry key.

1. On the old machine, enter Registry Editor. Run→regedt32.
2. Select the Insbridge key: HKEY_LOCAL_MACHINE→SOFTWARE→Insbridge.
3. Right click and select **Export**.
4. Select a storage location for the file and **Save**.
5. Close out of Registry Editor.

Step 2: Importing the Registry Key

The old registry key needs to be imported in to the new machine. The registry can be imported using IBFA.

1. **Save the Exported Registry Key** to a location you can easily access.
2. **Double click the Exported Registry Key**. The key will be loaded.
3. Store the Exported Registry Key in a safe location.

Step 3: Re-enter Username and Password

1. Enter the new IBFA instance.
2. Browse to **SoftRater→Explorer→Subscriber name**.
3. Select the **Environments** link under the Configuration header on the left hand side.
4. You will notice that the database username and password entries will be blank. Please re-enter the username and password. Test connections for any SoftRater environments.
5. Save your entries and close out of environments.

Upgrading the Database Machine

If you are upgrading your database machine, the new database information will need to be entered in IBFA→Environments.

MANUAL UPDATES TO THE INSBRIDGE DATABASES

The preferred method of updating the ibrm, and ib_client databases is run them through ratemanager. If the administrator has db user privileges and is the db owner of the database as well as the disk administrator, database updates can be done on the tools → database → updates tab. If these privileges are not in place, an error message is displayed. See

Step 7 – Updating Databases for more information.

NOTE: *If you need to go from an older version, such as 5.0.1, it is strongly recommended that you enter RateManager and run the script successively starting with 05.02.00, 05.03.00, and so on until you reach the 5.6.1 script. Failure to run scripts in order may result in errors.*

To manually update a SQL Server database, you will be required to save off each update and run them in sequential order in SQL Server. A DBA or a person with the proper permissions will need to apply the database updates in SQL Server using Query Analyzer.

1. In RateManager, go to Tools->Database->Updates.
2. Select the update you need. Begin with the version that is listed as Current. If you are going from a much lower version of RateManager, you will have to save multiple files.
3. Click **Save Update Script to File**. Your computers dialog box is displayed. **Save** the file to a location of your choice. For IBRM scripts, it is recommended that you rename the file to usp_IBRM_R0(version number).sql. For example the release 5.6.1 update would be: usp_IBRM_R05.06.01.sql. For IB_CLIENT scripts, it is recommended that you rename the file to usp_IB_CLIENT_R0(version number).sql. For example the release 5.6.1 update would be: usp_IB_CLIENT_R05.06.01.sql.
4. Verify that you have saved all the necessary scripts from “current” to release 5.6.1. You must save off update scripts for both the IBRM and the IB_CLIENT databases.
5. Next, enter SQL Server.

NOTE: *If you do not have database permissions, you will not be able to perform the following database queries.*

NOTE: *When using Database Engine Query, the SQL scripts must run on each individual database.*

6. Begin with the current version of either the IBRM database or the IB_CLIENT database. Open

Query Analyzer

7. **Open up the DB script updates** from the download file. You can open in any program you want, such as Notepad. Begin with the “current” script. For example, if you are going from release 5.0.1 to 5.6.1, 05.01.00 should be “current”. Open 05.02.00 first.

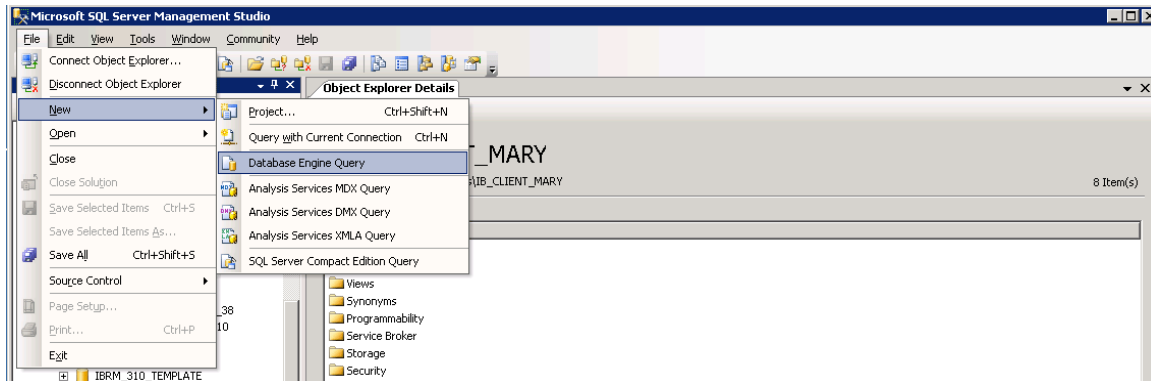
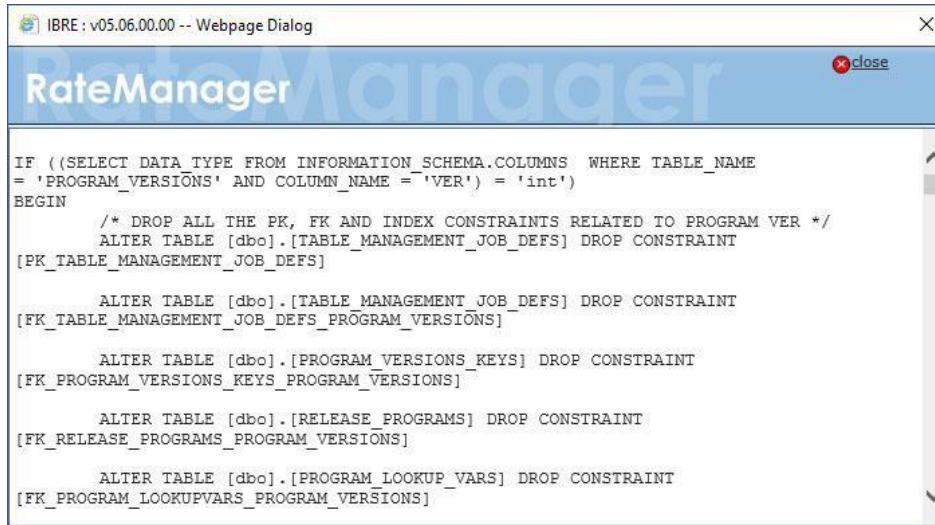


Figure 40 Updating Database

8. Select the database you want to update. In SQL Server Management Studio, create a new Database Engine Query, **File→New→Database Engine Query**.
9. Copy the first update from Notepad and paste onto the query screen.
10. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen. You must run the updates in sequential order. Run each update until you run the 5.6.1 update.
11. When you have finished updating one database, update the remaining database. Make sure you do both the IBRM and IB_CLIENT databases.
12. After the scripts have been run, return to RateManager. Click **Refresh Listing**. The status should show current and the full RateManager menu should be displayed. The updates are now properly applied and users can log back in to the system.

NOTE: You can view the update script in RateManager. Select the update you want to view. Click **Open Update Script**. The update script will be displayed in a separate screen.



The screenshot shows a web browser window titled "IBRE : v05.06.00.00 -- Webpage Dialog". The main content area is titled "RateManager" and contains a SQL script. The script is as follows:

```
IF ((SELECT DATA TYPE FROM INFORMATION_SCHEMA.COLUMNS WHERE TABLE_NAME
= 'PROGRAM_VERSIONS' AND COLUMN_NAME = 'VER') = 'int')
BEGIN
    /* DROP ALL THE PK, FK AND INDEX CONSTRAINTS RELATED TO PROGRAM VER */
    ALTER TABLE [dbo].[TABLE_MANAGEMENT_JOB_DEFS] DROP CONSTRAINT
    [PK_TABLE_MANAGEMENT_JOB_DEFS]

    ALTER TABLE [dbo].[TABLE_MANAGEMENT_JOB_DEFS] DROP CONSTRAINT
    [FK_TABLE_MANAGEMENT_JOB_DEFS_PROGRAM_VERSIONS]

    ALTER TABLE [dbo].[PROGRAM_VERSIONS_KEYS] DROP CONSTRAINT
    [FK_PROGRAM_VERSIONS_KEYS_PROGRAM_VERSIONS]

    ALTER TABLE [dbo].[RELEASE_PROGRAMS] DROP CONSTRAINT
    [FK_RELEASE_PROGRAMS_PROGRAM_VERSIONS]

    ALTER TABLE [dbo].[PROGRAM_LOOKUP_VARS] DROP CONSTRAINT
    [FK_PROGRAM_LOOKUP_VARS_PROGRAM_VERSIONS]
```

Figure 41 Script Viewer

UPGRADING SOFTRATER FOR JAVA

The steps to follow for upgrading SoftRater for Java depends upon what Insbridge release you are starting from:

Upgrading from Release 3.13.4 or previous to release 5.6.1 requires:

- Removal of the previous .EAR and config files
- Deploying the new .EAR file
- The application starting file must be updated
- A New SoftRater database be created
- Run database upgrade script
- Packages must be re-loaded

Upgrading from release 3.13.5 to release 4.6.X to release 5.6.1 requires:

- Removal of the previous .EAR file
- Deploying the new .EAR file
- The application starting file must be updated
- A New SoftRater database be created
- Run database upgrade script
- Packages must be re-loaded

Upgrading from release 4.7.X to release 5.6.1 requires:

- Removal of the previous .EAR file
- Deploying the new .EAR file
- A New SoftRater database be created
- Run database upgrade scripts
- Packages must be re-loaded

Upgrading from release 5.0.1 to release 5.6.1 requires

- Removal of the previous .EAR file
- Deploying the new .EAR file
- Run database upgrade script

If you are upgrading from release 3.12 or previous you should check for SOAP changes. Updated WSDL documents will need to be incorporated into any client calling application that communicates with SoftRater. If upgrades are done to the SoftRater for Java engines without updating the calling applications, the calling application will fail.

NOTE: UPGRADE YOUR TEST ENVIRONMENT PRIOR TO PRODUCTION. Validate in test prior to implementing in production.

SoftRater Update Notice

If you are updating from release 5.0 or earlier, the SoftRater database has updated requirements:

Due to schema changes, all SoftRater databases for releases 5.0 and earlier must be created new.

For customers who are upgrading a SoftRater instance, new databases must be created for any upgrade from release 5.0 and earlier. For new database upgrades, packages will have to be re-loaded to the new database. Packages will still be available on disk.

UPGRADING IBSR – An Upgrade folder is located inside each of the database types with one upgrade script and Instructions for running the update. When upgrading from a release prior to release 5.0. users must create new and re-load packages.

Only one update script is available per database type. This script covers all updates from the last schema change. This reduces the number of potential upgrade scripts users must run and assures that the scripts are run in the correct order. Any script that has already been run will be skipped. This change allows for easier management of IBSR update scripts.

SoftRater Machine Update

If you are updating SoftRater to a new machine, the process is a combination of a new install and an upgrade.

- The old .EAR files do not have to be deleted. If the machine is decommissioned or is not accessible, then the .EAR file is not available to users and does not need to be deleted. If the machine is available, it is a good practice to delete the old .EAR file so users no longer can access it.
- A new folder to hold the .EAR file, config file, and Instance directory must be created on the new machine.
- The old config.xml file should be copied from the previous machine to the new machine. If you use a new config.xml file, all the previous setup information will need to be re-entered in IBSS.
- On the new machine, the start files must be updated to allow for the APP_DIR and INSTANCE_APP_DIR directories to be added.
- The same databases can be used. If upgrading from a release prior to 5.0.0, a new data base will need to be created and update scripts will need to be run. Update IBSS with the new database information. Packages will also have to be re-loaded. If you are upgrading from release 5.0.1 or later, you do not need to do this.
- The updated server information needs to be entered in to IBFA.

For example, if you are upgrading from a 3.13 release to the latest and going to a new machine:

Upgrading from Release 3.13.4 or previous to release 5.6.1 and moving to a new machine:

- If possible, removal of the previous .EAR and config files
- Create a folder for the .EAR file, config.xml file, and Instance directory
- Copy the previous config.xml file to the new machine
- The application starting file must be updated
- In the new machine, deploy the new .EAR file
- A New SoftRater database must be created
- Run database upgrade script
- Packages must be re-loaded
- New machine information must be entered in IBFA

SOFTRATER UPDATES

The SoftRater for Java engines is Apache TomEE

The upgrade procedures to the application are similar and the upgrade procedure for the associated databases is the same.

SoftRater Update Notice

If you are updating from release 5.0 or earlier, the SoftRater database has updated requirements:

Due to schema changes, all SoftRater databases for releases 5.0 and earlier must be created new.

For customers who are upgrading a SoftRater instance, new databases must be created for any upgrade from release 5.0 and earlier. For new database upgrades, packages will have to be re-loaded to the new database. Packages will still be available on disk.

UPGRADING IBSR – An Upgrade folder is located inside each of the database types with one upgrade script and Instructions for running the update. When upgrading from a release prior to release 5.0 users must create new and re-load packages.

Only one update script is available per database type. This script covers all updates from the last schema change. This reduces the number of potential upgrade scripts users must run and assures that the scripts are run in the correct order. Any script that has already been run will be skipped. This change allows for easier management of IBSR update scripts.

SOAP Notice

This notice is for customers currently running a SoftRater for Java engine. Necessary updates have been made to the SoftRater for Java engines:

- **SoftRater for Apache TomEE uses SOAP version 1.1.**

These changes mean that the WSDLs for the SoftRater for Java engines may have been modified since the last installation of SoftRater for Java. Updated WSDL documents may need to be incorporated into any client calling application that communicates with SoftRater. If upgrades are done to the SoftRater for Java engines without updating the calling applications, the calling application will fail.

Please update a test environment prior to deploying to production. Install the .EAR file in a test environment to obtain the WSDL. Update your calling application and then test again. When testing is complete, you can upgrade your other environments.

NOTE: *Customers running a Windows only environment, without a Java component, will not be affected.*

These updates are for the SoftRater for Java engines only.

SOFTRATER FOR APACHE TOMEE

SoftRater for Apache TomEE can be upgraded any time after the Insbridge system. Prior to upgrading, download the SoftRater for Apache TomEE Engine Setup file.

Place the contents for the release 5.6.1 in a location you can easily access.

The file content include:

- IBSS.ear
- Insbridge.net.softmaterconfig.xml

Upgrading to 5.6.1

This upgrade requires the creation of an Instance folder. The Apache TomEE configuration information need to be updated for new SoftRater information. However, the softmater insbridge.net.softmaterconfig.xml need not be re-entered in IBSS.

To upgrade to the latest version, follow the Insbridge Enterprise Rating Using Batch Rating guide to perform the following:

- Setting up Apache TomEE
- Copy new or upgrade (Existing insbridge.net.softmaterconfig.xml) file to configured directory.
- Configuring HTTPS for secured protocol usage
- Set up Clustering if required.
- Soft Libraries re-configuration in the new Apache TomEE instance
- Configuring JMS Queues

SOFRATER UPDATE NOTICE

If you are updating from release 5.0 or earlier, the SoftRater database has updated requirements:

Due to schema changes, all SoftRater databases for releases 5.0 and earlier must be created new.

For customers who are upgrading a SoftRater instance, new databases must be created for any upgrade from release 5.0 and earlier. For new database upgrades, packages will have to be re-loaded to the new database. Packages will still be available on disk.

Database User Roles and Permissions

If a more granular approach is required for management of security of the Insbridge databases, then the following guidelines can be used to set permissions.

NOTE: *These are only guidelines. If not properly configured, certain processes within the Insbridge Enterprise Rating System will fail. An experienced database administrator's expertise is highly recommended before making any security changes.*

Recommended SoftRater Permissions:

The recommended permissions are required for new tables to be created in the SoftRater (IBSR) database dynamically when an SRP (SoftRater Package) is loaded to the SoftRater system. If the recommended permissions are not possible, manual steps will need to be performed that will allow for packages to be loaded.

Insbridge SoftRater can utilize Oracle database. It is recommended that the Insbridge user be granted, as defaults, the "CONNECT" and "RESOURCE" Roles.

Updating a SoftRater Database

All SoftRater databases can be checked for updates in IBFA.

1. SoftRater->Explorer->Subscriber->Settings->Environments.
2. Select the SoftRater environment with the database where you want to check for updates.
3. Click Test Environment.

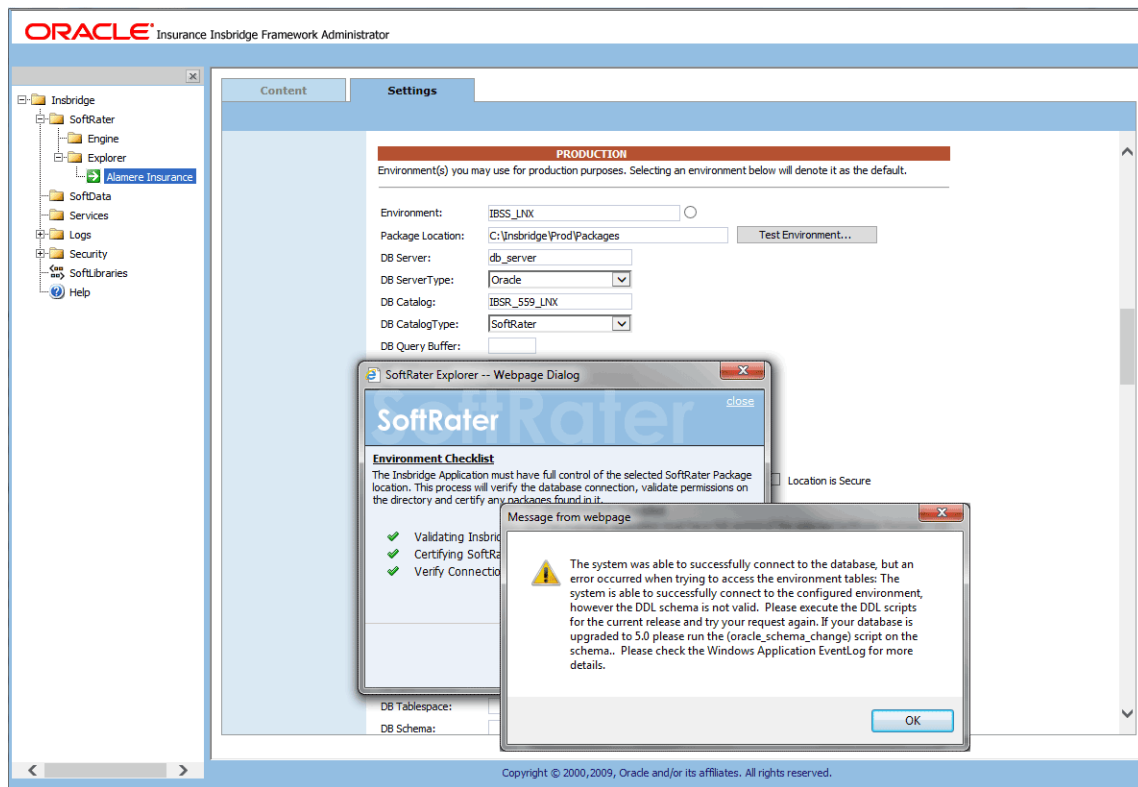


Figure 45 Checking for Database Updates

When the database is being validated, either a green checkmark is presented or an error message. The error message will indicate if an update must be run. For example, when validating an Oracle environment:

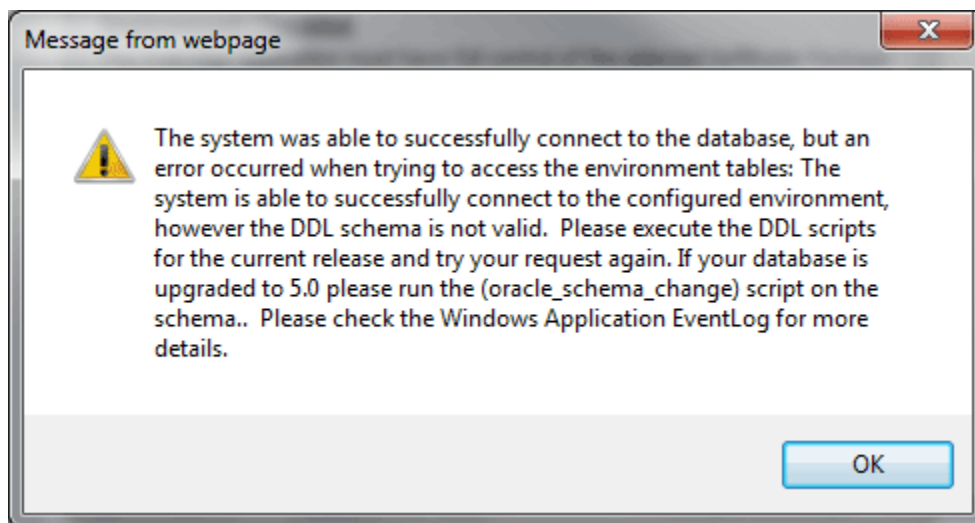


Figure 46 Oracle Database Update Required Message

DDL scripts for updates also can be found on the server where Inbridge was installed in the ...\\Oracle\\Inbridge\\SoftRater\\DDL folder.

For example: C:\Program Files\Oracle\Inbridge\SoftRater\DDL\Oracle\Update

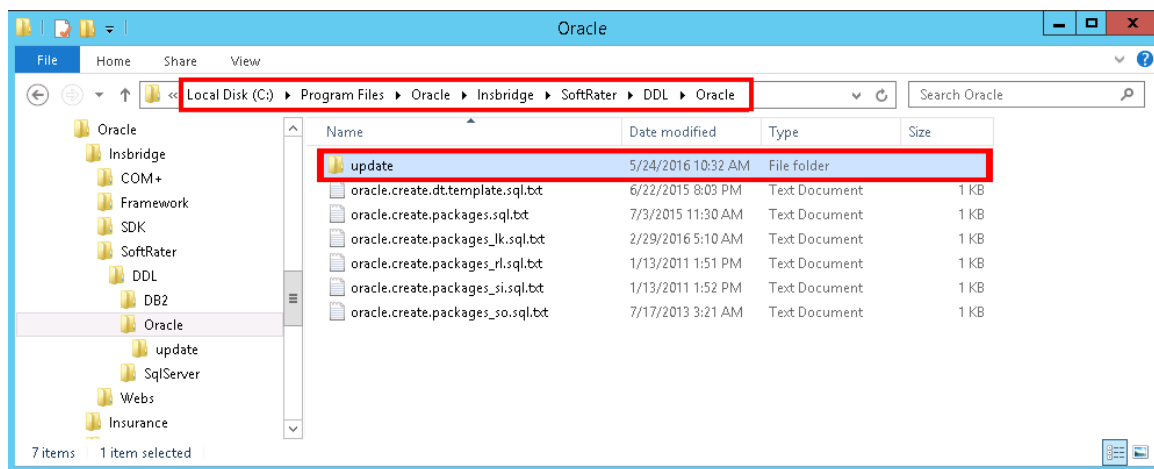


Figure 47 Location of Database Update Scripts

For SQL Server, backup files are included in the Insbridge-Windows folder under databases.

If backup files cannot be used and DDL scripts are needed, SQL Server DDL scripts can be found on the server where Insbridge was installed in the ...\\Oracle\\Insbridge\\SoftRater\\DDL\\SQL folder. For example: C:\\Program Files\\Oracle\\Insbridge\\SoftRater\\DDL\\SQL

SQL Server DDLs are not included in the Insbridge-Windows folder.

Oracle

SoftRater database schema is supported by all available ORACLE database platforms.

JDBC Driver Class

"oracle.jdbc.driver.OracleDriver" Using
prefix jdbc:oracle:thin:

Supported Versions – 11g, 12c, 19c User Account Requirements

Create Table Create
Index
Query access to "SYS.OBJ\$"

Configuration Settings

- **Required**
The query dynamics of the SoftRater system requires some modification to Configuration settings. The following Performance Configurations parameters required to the target SoftRater database.
Instance Level – ASLHEAPSZ >= 1024 Instance
Level – QUERY_HEAP_SZ => 10240 Database
Level – APPLHEAPSZ >= 1024
- **Recommended**
The query dynamics of the SoftRater system will benefit from the following modification to Configuration settings.
Instance Level – INTRA_PARRALLEL (Yes) – For Symmetrical Processing Machines (CPU >=2)
Database Level – DFT_DEGREE (-1) – For Symmetrical Processing Machines (CPU >=2). Allow the optimizer to determine the degree of intra-partition parallelism based on the number of processors and the type of query.

UNIX Environment

1. Create a new script file called **setenv.sh** under the \$CATALINA_HOME/bin directory with the following contents:

```
setenv.sh
export JAVA_OPTS="-Dfile.encoding=UTF-8 -Xms256m -Xmx2048m -
XX:PermSize=256m -XX:MaxPermSize=1024m"
```

 - Xms: This is the initial and minimum Java heap size in megabytes. By default, there is no value specified for this field. The heap is basically the memory space which holds all the objects created by your application.
 - Xmx: The maximum Java heap size in megabytes. By default, the maximum heap size value is 256 MB.
 - XX:PermSize: This is the initial size for permanent generation (or perm gen). It is the place where Apache TomEE caches classes and other resources in the memory.
 - XX:MaxPermSize: The maximum permanent generation size.
2. Save the file and then restart the Apache TomEE server to apply the changes.

Windows Environment

1. Create a new script file called **setenv.bat** under \$CATALINA_HOME/bin directory with the following contents:

```
setenv.bat
export JAVA_OPTS="-Dfile.encoding=UTF-8 -Xms256m -Xmx2048m -
XX:PermSize=256m -XX:MaxPermSize=1024m"
```
2. Once the file is created successfully, restart the Apache TomEE server to apply the changes.

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

Step 1: Create or Verify an Insbridge Application Pool

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

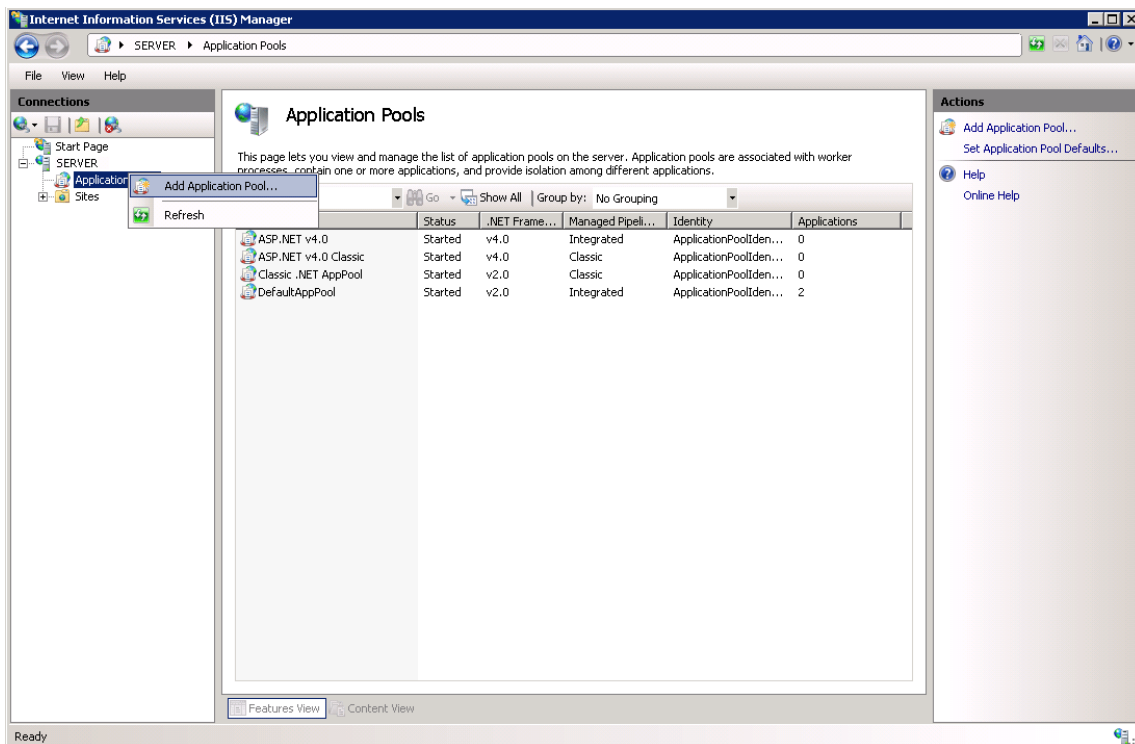


Figure 48 Navigating to Application Pool

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.

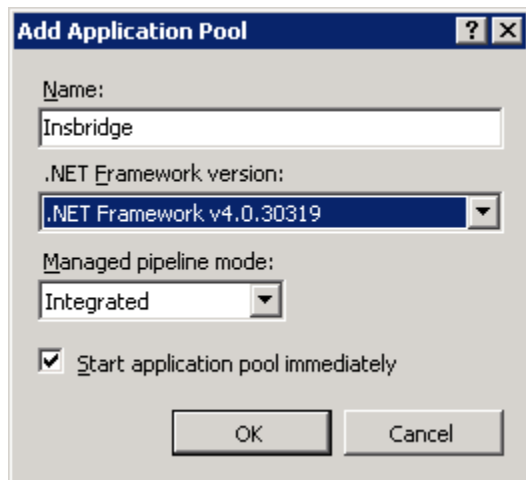


Figure 49 Creating a New Application Pool

Step 2: Update Settings

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

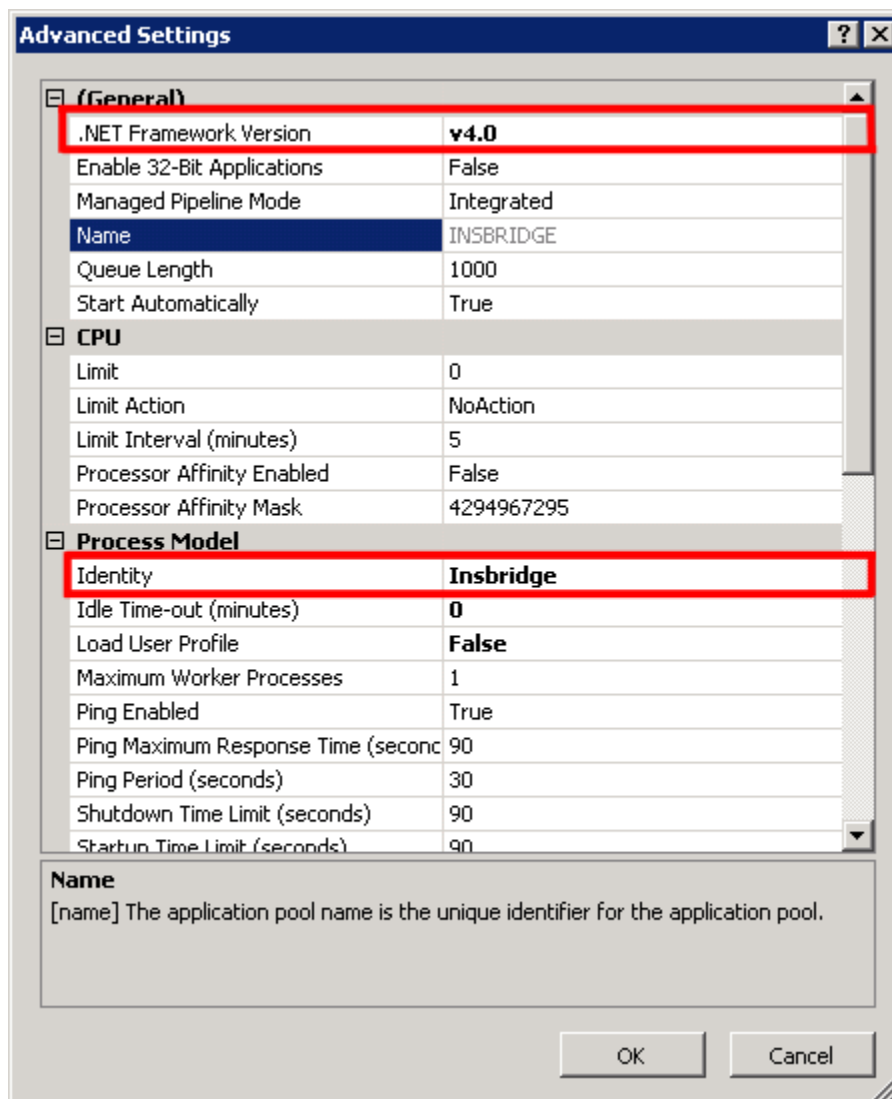


Figure 50 Selecting Application Pool Properties

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**.

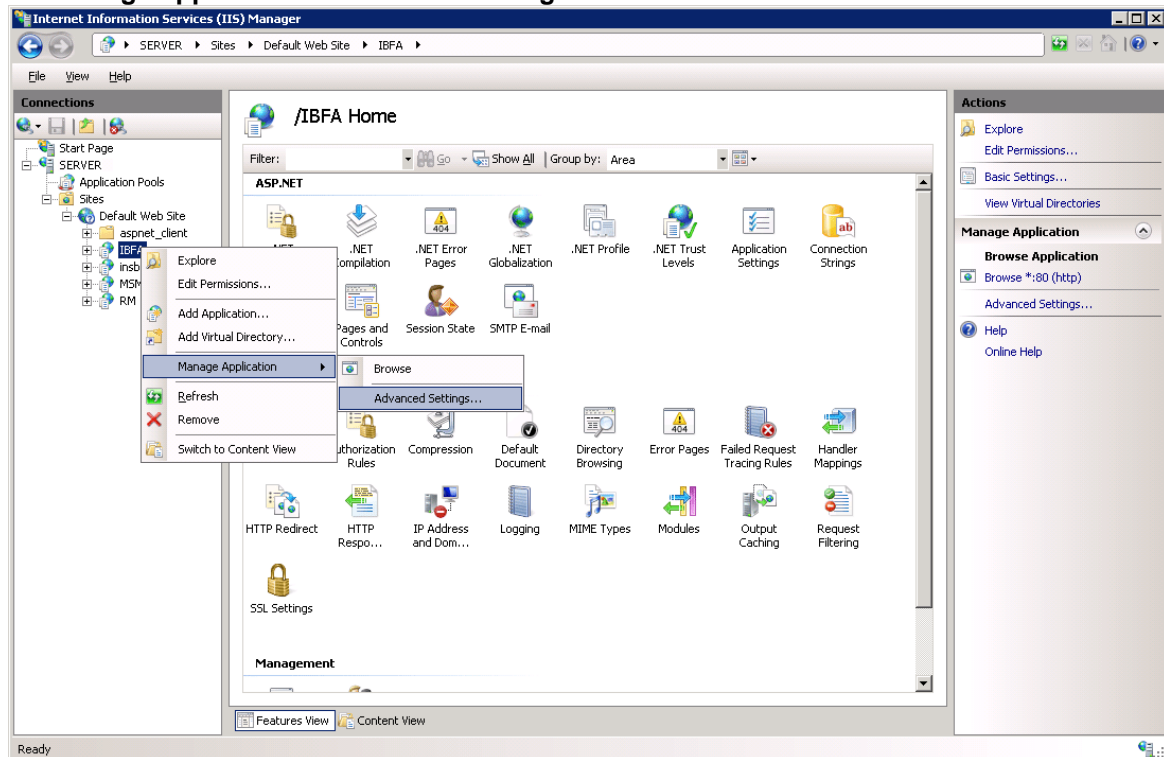


Figure 51 Associating the Virtual Directories with the Insbridge Application Pool

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

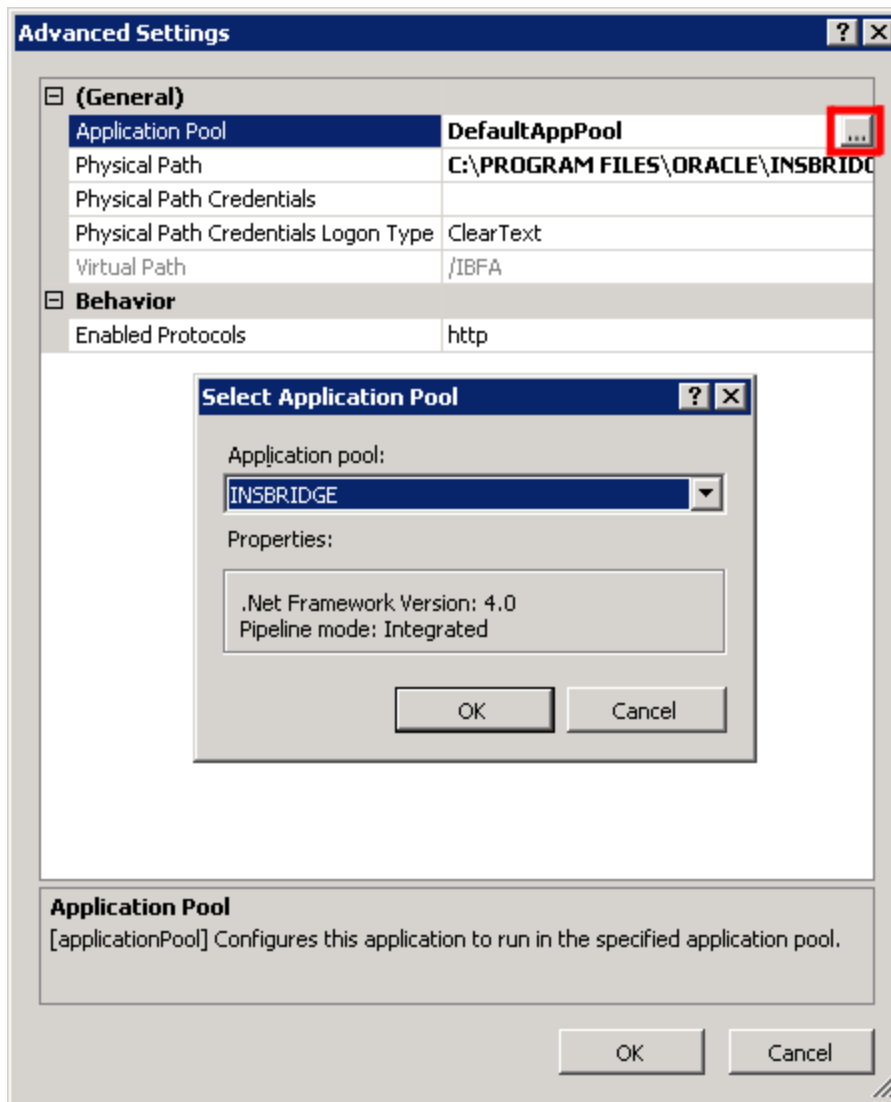


Figure 52 Adding Application to Application Pool

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**.

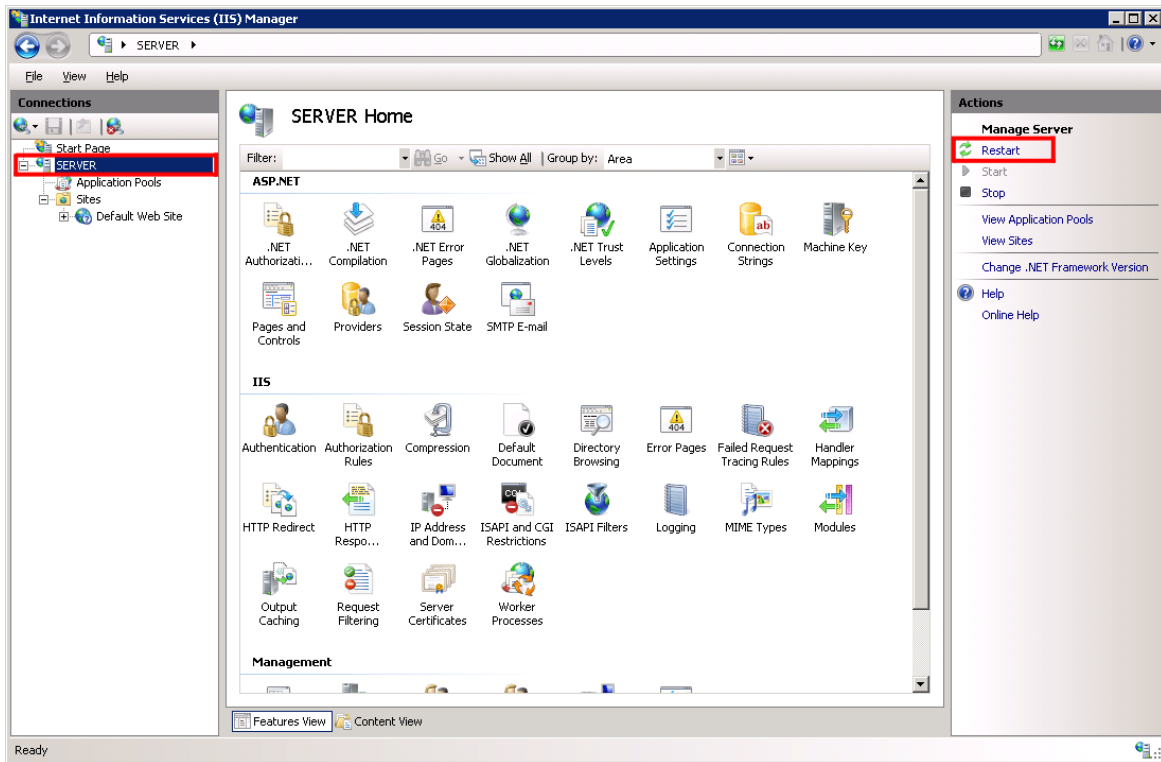


Figure 53 Restarting IIS

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\v2.0.50727\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.

TROUBLESHOOTING

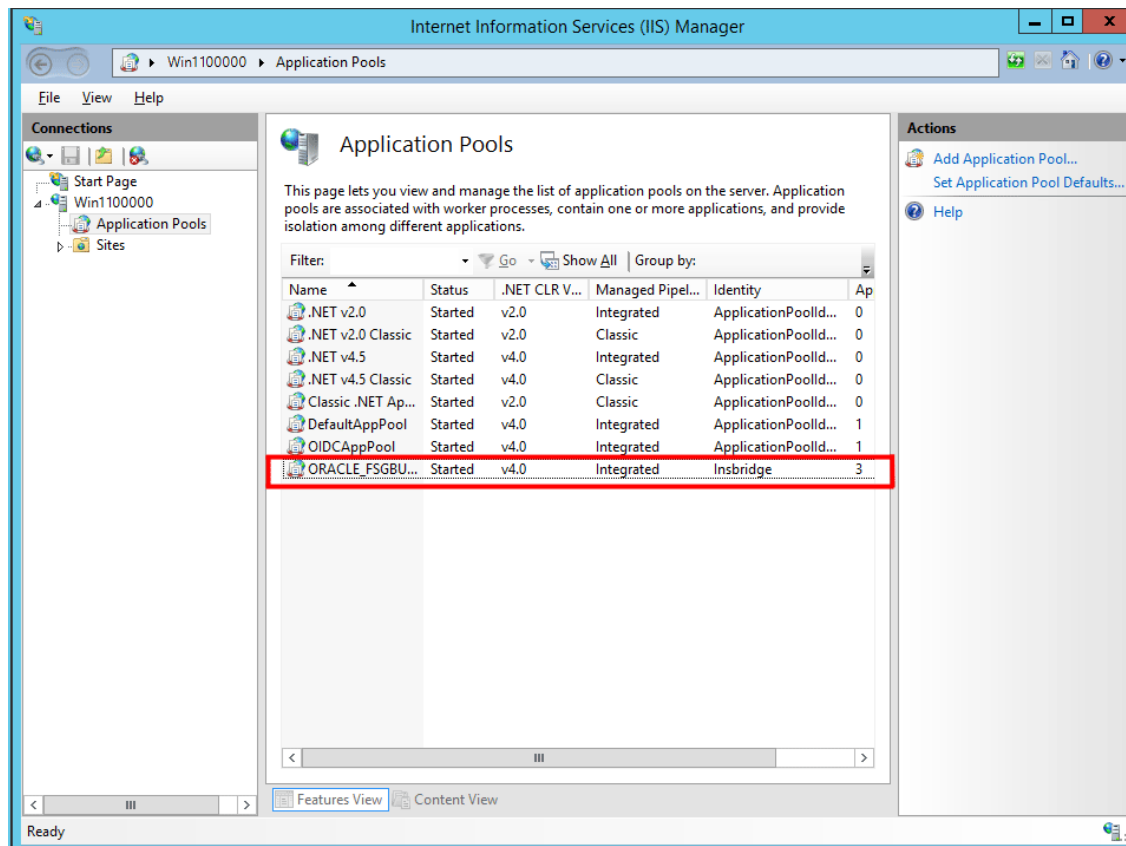
In the event that RateManager or IBFA fails to launch, please check the application pool and Com +.

VERIFYING THE INSBRIDGE APPLICATION POOL

Insbridge requires .NET framework setting of v4.5.2. This may present conflicts with other applications in the default application pool that require a different setting. To avoid conflict and improve performance, a separate Insbridge Application Pool must be used.

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.

Any previous Insbridge application should not be used.

VERIFYING THE COMPONENT SERVICES

Next, you should verify the component services.

1. Click **Start→Server Manager→Tools→Component Services**.
2. Expand the **Component Services** 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.

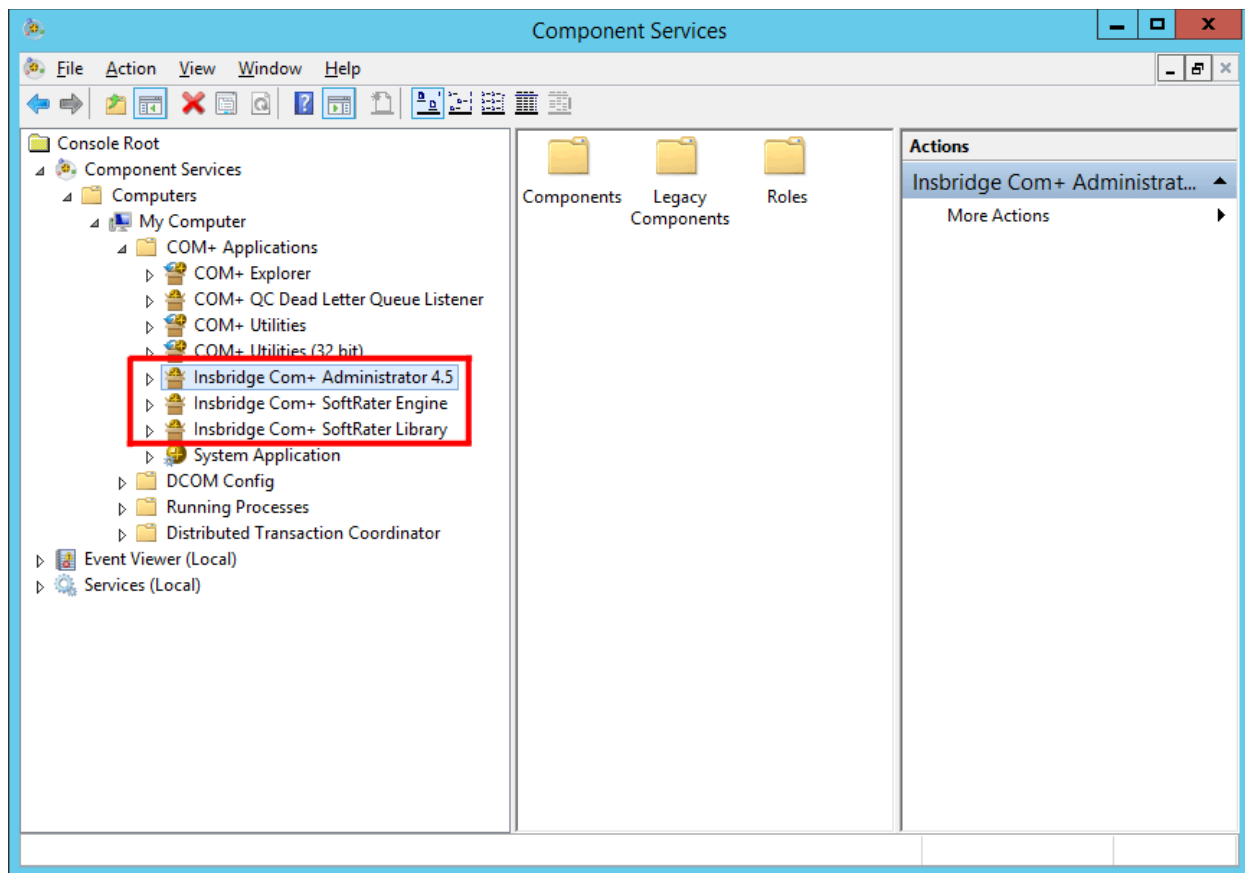


Figure 54 Component Services

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.

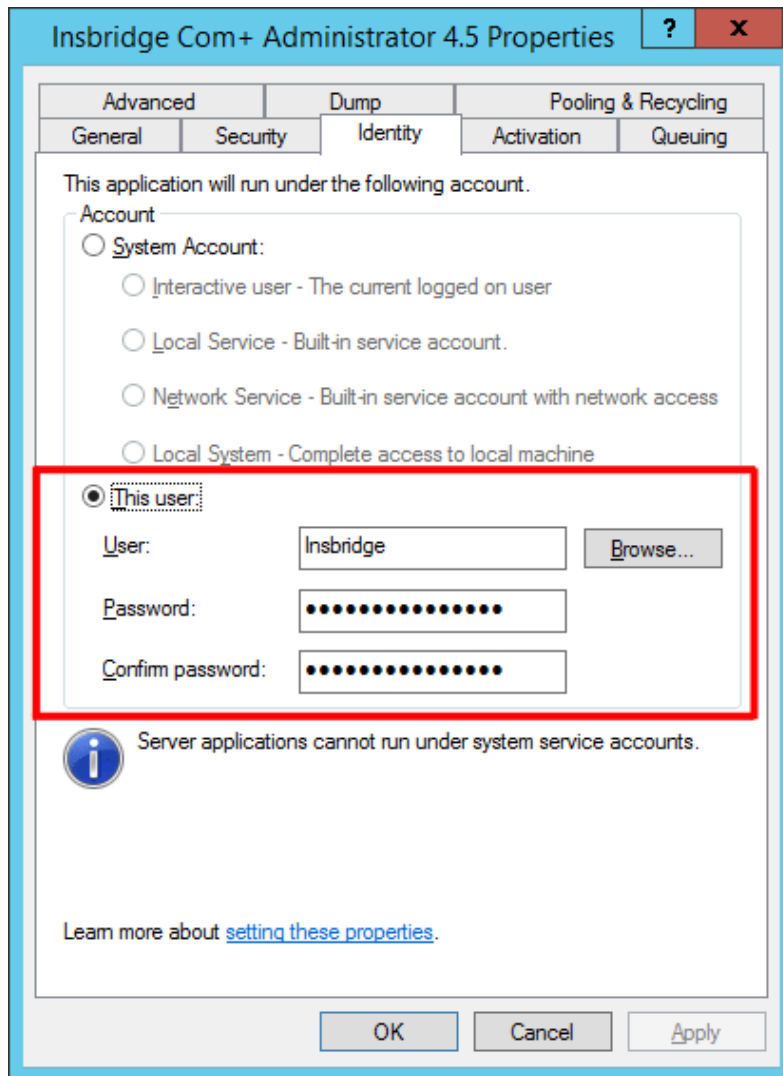


Figure 55 Updating Com Plus to the Insbridge User

5. Repeat for the other com+ services.

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