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Introduction

Overview

The Oracle Insurance Policy Administration (OIPA) application and the Rules Palette application together form a complete solution. A four step installation process is required in order to install and set-up both applications. These instructions represent step four of that process. Refer to the documentation library included with this release for the other three steps of installation.

The Rules Palette can be downloaded from the Rules Palette Web Application Utility. Your build manager will send the URL of the Web Application Utility. You will also receive two or three sets of user IDs and passwords. You will need this information when you create an environment connection in the Rules Palette.

After you have downloaded the Rules Palette and configured the environment connections, you will be able to begin working in the application.

Customer Support

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Prerequisites

- Database of your choice (step one of installation process)
- OIPA deployed on a server of your choice (step two of installation process)
- Web Application Utility deployed on a server of your choice (step two of installation process)
- Microsoft Windows XP or later
- Rules Palette uploaded on Web Application Utility (step three of installation process)
- URL for the Rules Palette Web Application Utility. This will come from your build manager.
- A Web Application Utility username and password. This will come from your build manager
- Rules Palette username and password. This will come from your build manager.
- Database username and password. This will come from your build manager.
- IVS database username and password. This will come from your build manager. This database information is only necessary if you are using an IVS environment.
- Location of the database driver. Each type of database requires a specific driver(s). You will need to point to the location of the driver(s) during the environment creation. This will come from the build manager.

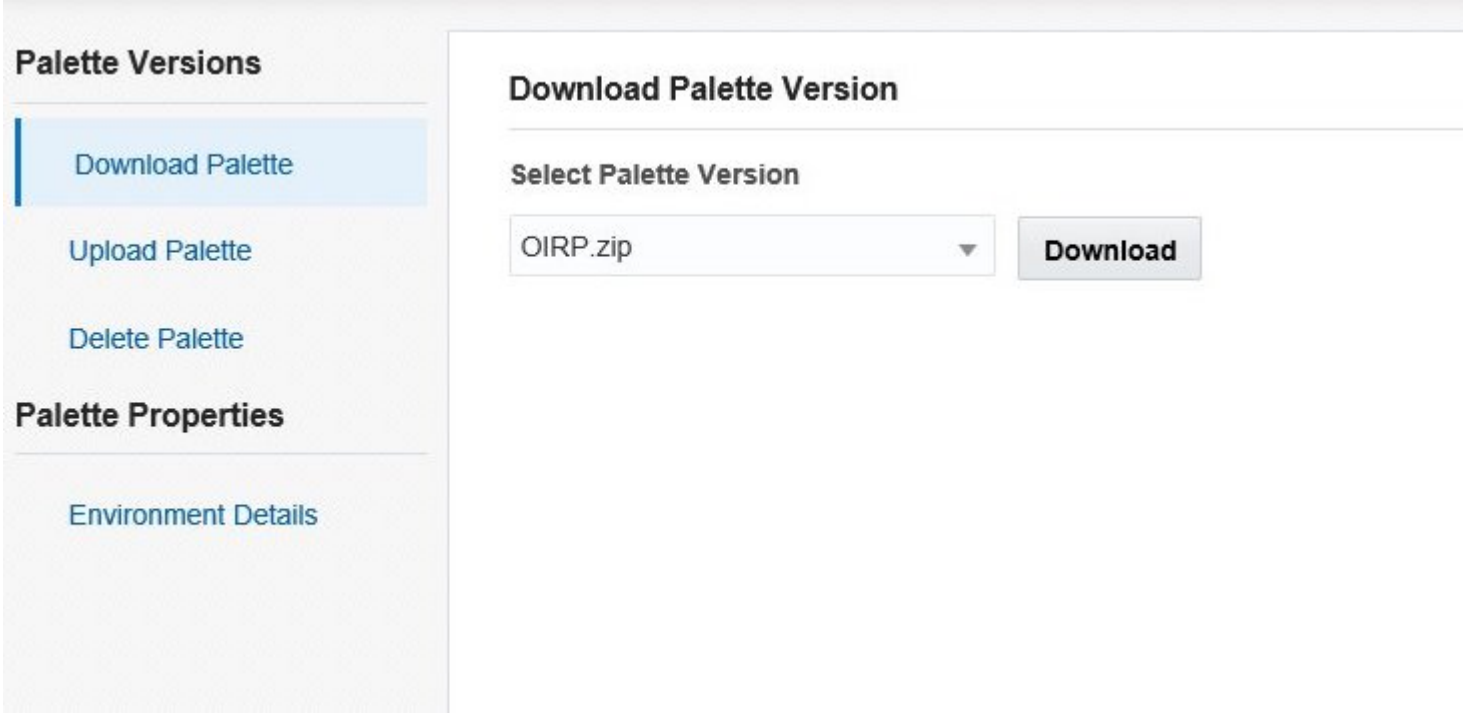
Download Rules Palette

The following steps describe the procedure for downloading the Rules Palette from the Rules Palette Web Application Utility.

> **Note:** If you are accessing the Rules Palette through a remote desktop then contact your build manager for connection instructions.

Steps to Download the Rules Palette from the Web Application Utility

1. In your browser, go to the URL of the Web Application Utility as provided by your build manager.
2. Log in to the Web Application Utility using login credentials provided by your build manager.
3. Click **Download Palette**, the Rules Palette that you want to download.



Web Application Utility Download list

1. Click Open from the File Download window when it asks what you want to do with the file. It will take a few minutes for the file to download. Once the file has been downloaded, it should automatically open with the compression software that is available on your system. If you do not have compression software, contact your IT department.
2. Extract the files using your compression software and save the files to your local computer in the %USERPROFILE% directory (e.g - C:\Users\Username). This is recommended to meet the security compliance.

> **Note:** Note:You may need to create a folder called Rules Palette within %USERPROFILE% \Oracle, if one does not already exist.

3. Launch the Rules Palette via the executable file asgraphicruleside.exe. This file will run the Rules Palette. To launch the application, double-click on the executable file. This executable file can be found in the following directory:

```
%USERPROFILE% \Oracle\RulesPalette\bin
```

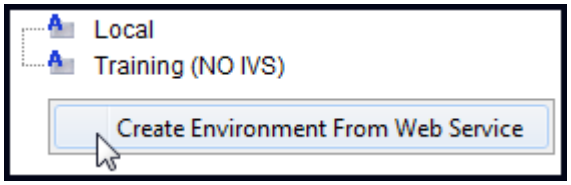
4. Create a shortcut on your Desktop. This will make it easier to access the Rules Palette. To create a shortcut, right-click on the asgraphiculeside.exe file (%USERPROFILE% \Oracle\RulesPalette\bin) and select **Create Shortcut**. Once the short-cut appears, drag it out onto your desktop.

Create Environment Connection

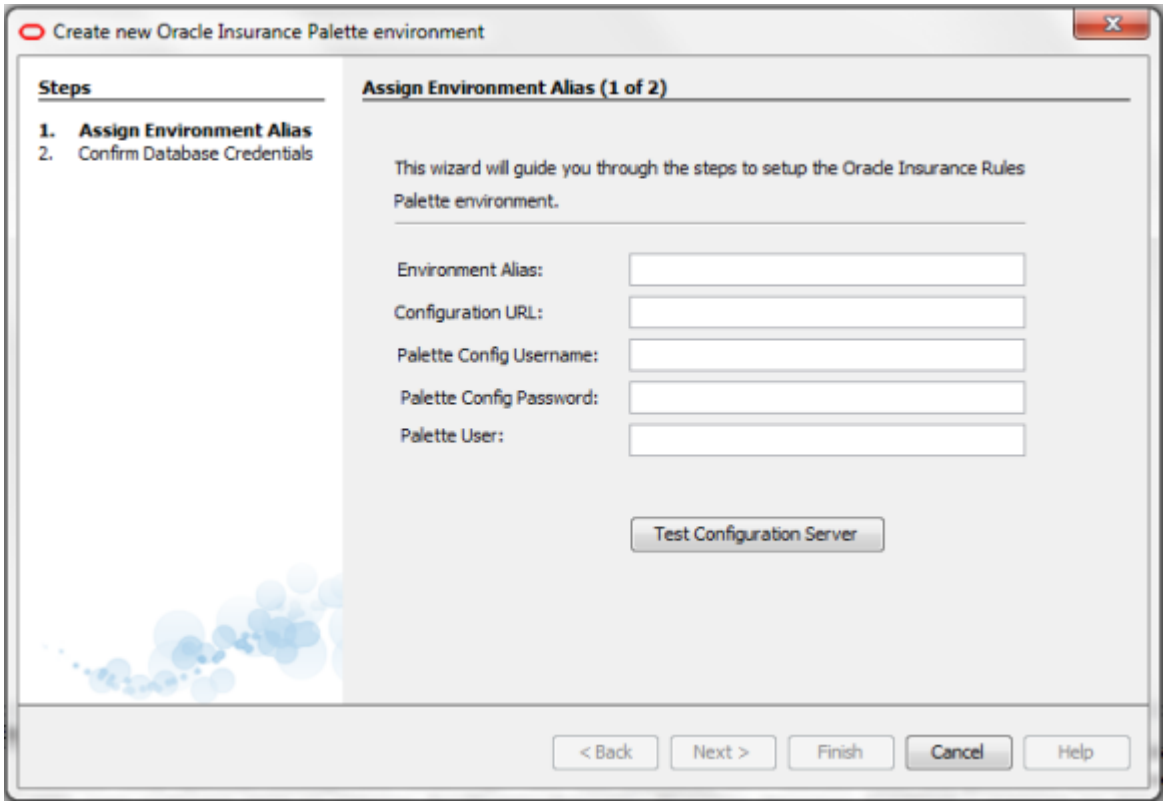
After the Rules Palette has been downloaded, you need to open the application and create an environment connection. All of the environment connection information will automatically populate once you enter the appropriate user names and passwords. User names and passwords can be obtained from your build manager.

Steps to Create an Environment Connection

1. Double-click the Rules Palette short-cut icon you created on your desktop.
2. Click the **Main Explorer** tab.
3. Right-click inside the tab and select **Create Environment from Web Service**.



Rules Palette Right-Click Menu Option for Environment Creation



4. The environment creation wizard screen appears.

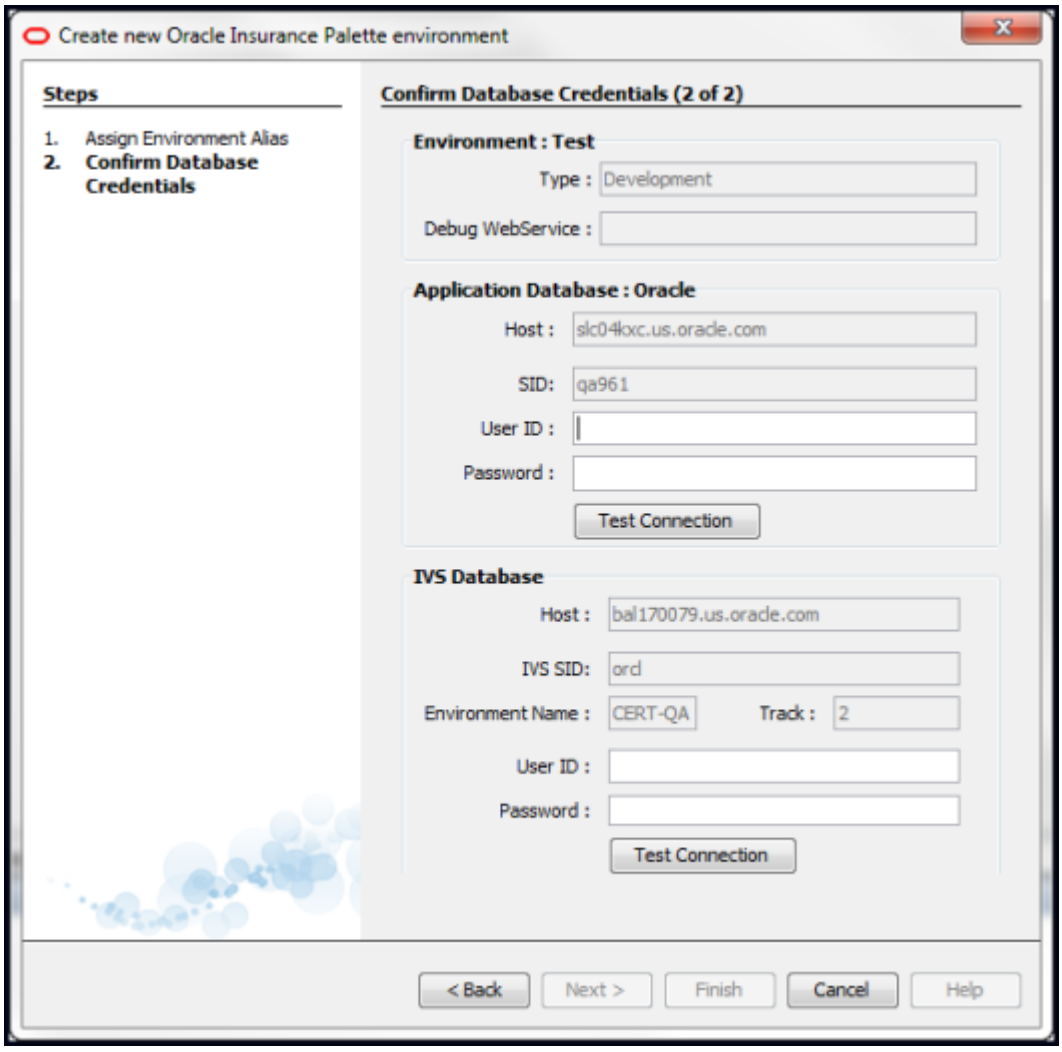
Step 1 of environment creation wizard

1. Enter an **Environment Alias**. This should be a descriptive name for the environment that will allow you to distinguish between the environments you create.
2. Enter the **Configuration URL** information provided by the build manager.

3. Enter the **Palette Config Username**. This is a username used to log in to the Web Application Utility.
4. Enter the **Palette Config Password** for the username used in the previous step.
5. Enter the **Palette User** provided by the build manager which was created while configuring Palette Config fresh Environment.
6. Click **Test Configuration Server** to test your environment connection. If the connection is successful, click **Next** and advance to next screen i.e., Confirm Database Credentials wizard. If your connection fails, contact your build manager.

   > **Note:** If you receive an error message that says your user name and password are incorrect, check your configuration URL as well. There are instances where errors in these fields also trigger the user name and password error.

7. Browse to the location of the jdbc driver files. The location should be in the Rules Palette .zip file in the database driver folder. (SqlServer uses a jtds-jar and DB2 uses two jar files beginning with db2_***.jar.) You will only need to specify the jar file location the first time you set-up an environment. If you create additional environments, then this Browse field will not display.
8. Type the **User name** and **password** for the OIPA database. The build manager will send this information to you. This is different from the user name and password you will use to log on to the Rules Palette.
9. Type the **User name** and **password** for the IVS database (if the environment uses IVS). The build manager will send this information to you. This is different from the user name and password you will use to log on to the Rules Palette.

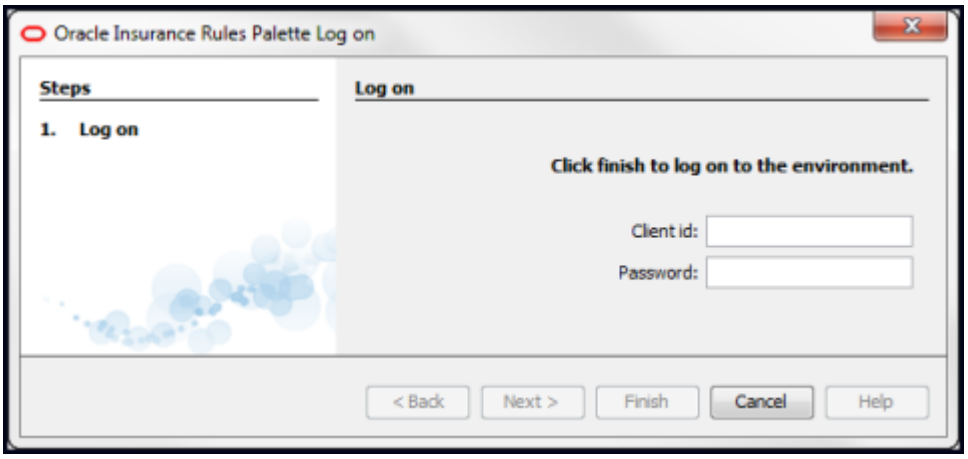


Step 2 of the Environment Creation Wizard

1. Click Test Connection to test your connection. After both database connections are successful, click **Finish**.

Log on the Rules Palette

1. Right-click on the new environment node you created and select **Log on**.
2. Type your Rules Palette user name in the **Client ID** field.
3. Type your password in the **Password** field.
4. Click **Finish**.



Log on Window

After you log on, the Rules Palette will begin loading business rules. The bottom right corner of the application window will show the progress. If the rules have not finished loading completely, then you may not be able to open some of the folders in the Explorer tabs. Wait until the loading progress bar disappears before trying to open any folders.

> **Note:** Refer to the Rules Palette help system to learn how to use the Rules Palette application. The help system can be accessed from inside the Rules Palette application. Click **Help** on the Main Menu bar.