

# Oracle Insurance IBRU Patch Upgrade Installation Guide

Version 3.11

December 2008

## *Insbridge IBRU Patch Upgrade Installation Guide*

*Version 3.11*

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*December 2008*

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# Preface

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Welcome to *Oracle Insurance Patch Upgrade Installation Guide*. This document provides general guidelines for applying the IBRU patch to upgrade a 3.10 IBRU system to 3.11. This patch is designed for servers that already have RateManager installed. It is not for new instances of RateManager. Please see the Insbridge Full Installation Guide. This guide does not include instructions on how to install IBRU.

## Audience

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This document is intended for technical personal that are involved in the development, maintenance, version control, QA and Deployment of Oracle Insurance applications.

## Additional Information

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For more information, see these Oracle Insurance resources:

- Oracle Insurance IBSS User Guide
- Oracle Insurance Full Installation Guide
- Oracle Insurance IBFA User Guide

## Notational Conventions

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This section explains the conventions used in this book:

- Menu selections are shown with arrows. For example, the command to select the **Print** choice from the **File** menu looks as follows:

Select **File**►**Print**

- File names, path names and actions to be taken are shown in **bold**.
- New or emphasized terms are shown in *italics*.
- `Monospace` type indicates code that appears on the screen or that you must enter.

## E-Delivery

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The Insbridge Rating and Underwriting (IBRU) System is available as a download from the Oracle E-Delivery system. Downloaded files are zipped. Prior to installation, please make sure the source machine(s) where IBRU will be loaded has an unzip utility.

An unzip utility for most platforms is available on the E-Delivery download page.

Documentation from E-Delivery is in PDF format. Prior to installation, please make sure the source machine(s) where IBRU documentation will be loaded has a PDF reader.

Files are downloaded with part numbers as file names. Please make note of the part numbers you have downloaded and the corresponding file name. For example, the RateManager 3.11 installation file is part # 15141-01 and file name V15141-01. This information may be required if you need to contact Oracle Insurance Support.

## Manual History

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New editions incorporate any updates issued since the previous edition.

<b>Edition</b>	<b>Publication Number</b>	<b>Product Version</b>	<b>Publication Date</b>	<b>Comment</b>
1 <sup>st</sup> Edition	P01-738-01		9/24/2004	Initial Version
2 <sup>nd</sup> Edition	P01-738-02		2/24/2004	Include identity in the IBFA patch
3 <sup>rd</sup> Edition	P01-738-03	V 3.5	03/28/2004	Update
4 <sup>th</sup> Edition	P01-738-04	V 3.6	11/11/2005	Updated for 3.6
5 <sup>th</sup> Edition	P01-738-05	V 3.6	10/04/2006	Update
6 <sup>th</sup> Edition	P01-738-06	V 3.7	10/04/2006	Updated for 3.7
7 <sup>th</sup> Edition	P01-738-07	V 3.8	7/19/2007	Updated for 3.8
8 <sup>th</sup> Edition	P01-738-08	V 3.8.3	10/03/2007	Updated for 3.8.3
9 <sup>th</sup> Edition	P01-738-09	V 3.8.5	November 2007	Updated for 3.8.5
10 <sup>th</sup> Edition	P01-738-10	V 3.8.7	January 2008	Update for 3.8.7
11 <sup>th</sup> Edition	P01-738-11	V 3.8.8	March 2008	Update for 3.8.8
12 <sup>th</sup> Edition	P01-738-12	V 3.9	May 2008	Update for 3.9.0
13 <sup>th</sup> Edition	P01-738-13	V 3.10	September 2008	Update for 3.10
14 <sup>th</sup> Edition	P01-738-14	V 3.11	December 2008	Update for 3.11

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## System Requirements

The patch can be applied only to a system that is configured with the previous version of the IBRU system.

Before performing the update, write down the configured identity of the COM+ applications. The identity will need to be reset after the Framework update and you will need to supply the COM+ identity's password. If you do not know the currently configured identity of the COM+ applications, check with the person who performed the original installation of the IBRU system for the correct password.

Oracle Insurance Support will not know the user identity or the password used at your location.

COM+ Identity Username: \_\_\_\_\_

COM+ Identity Password: \_\_\_\_\_

### Downloading from E-Delivery

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The installation downloads you can select are:

- RateManager Install – This is required for a RateManager Installation
- Framework Administrator Install – This is required for all installations
- SoftRater for WebSphere – This is required if you are using WebSphere
- SoftRater for WebLogic – This is required if you are using WebLogic
- SoftRater for JBoss – This is required if you are using JBoss
- Documentation – It is recommended that you download the documentation. Installation guides and updated user guides are located here.

SoftRater downloads are not required if you are running in Windows only.

The download files you receive will be zip files. Unzip the file to the machine where RateManager and Insbridge Framework are located. The RateManager zip file contains DB folder, IE7 Users, an Install folder and a Patch folder. Once unzipped, the file will be organized as follows:

The Framework Administrator zip file contains DB folder, an Install folder and a Patch folder. Open the Framework Administrator Patch folder first.

**NOTE**

Make sure every one is logged out of the IBRU system before starting the update.

## Installation Procedures

### Updates to the Insbridge Application Framework & RateManager

In both the RateManager install download and the Framework Administrator install download there will be a Patch folder. In the patch folders you will find:

- Insbridge Application Framework Patch
- RateManager\_3.11 Patch

The patches update the most recent installation. Rather than having you uninstall and reinstall the system, updates are added to a patch. Patches must be installed to bring the system to the latest version.

Open the patches on the server where Framework Administrator and RateManager are located. The patches need to be run from the same server.

Start with the Framework Administrator patch.

1. Install the framework update by double-clicking the framework patch MSI. You will be placed on Figure 1.

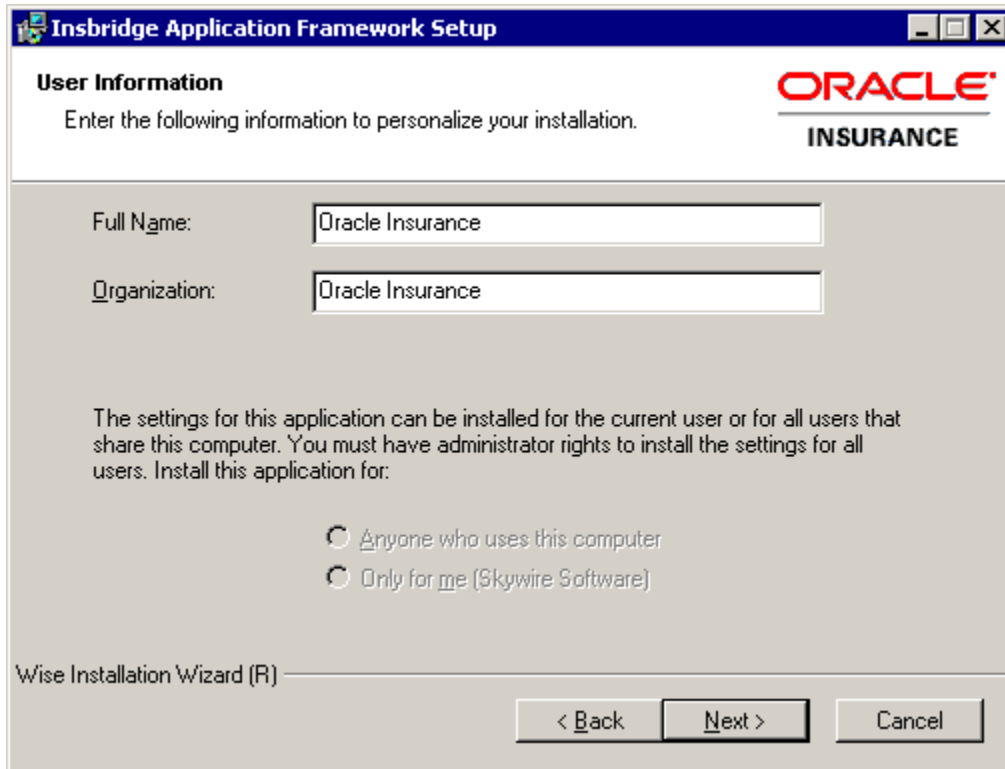


Figure 1 Setup Screen



2. Click **Next**.

The next screen is a ReadMe Information screen about the installation. Important information regarding the proper configuration of the Insbridge Rating and Underwriting System will be described. Click **Next** to continue.



**Insbridge Application Framework Setup**

**User Information**  
Enter the following information to personalize your installation.

**ORACLE<sup>®</sup>**  
**INSURANCE**

Full Name:

Organization:

The settings for this application can be installed for the current user or for all users that share this computer. You must have administrator rights to install the settings for all users. Install this application for:

☒ Anyone who uses this computer

☐ Only for me (Skywire Software)

Wise Installation Wizard (R)

< Back   Next >   Cancel

Figure 2 User Information

The **User Information** screen is next. Here you will enter a Name and the Organization.

Click **Next** to continue.

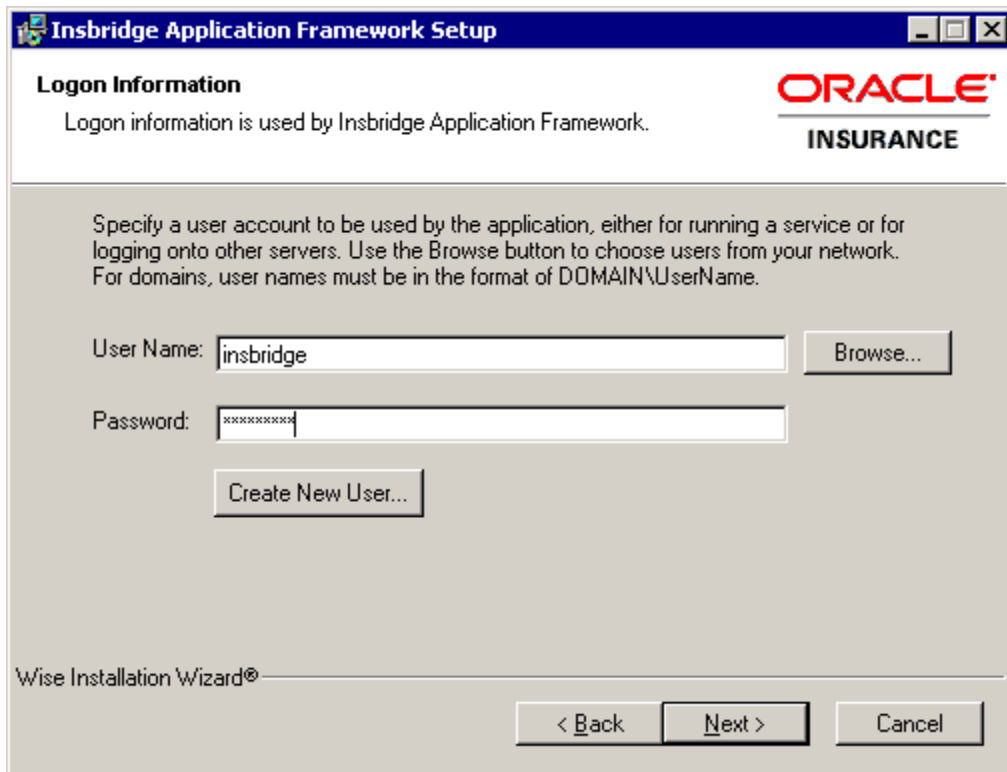


Figure 3 Logon Information

3. Enter the insbridge user name and password.
4. Click **Next**. An information screen will be displayed. Click **Next** to begin the installation. The update will begin modifying the application. A progress screen will be displayed.
5. A second ReadMe screen will be displayed. Some of the After Installation Instruction may not be required. It is recommended that you follow the Installation Guide. Click **Finish** to complete the installation.

If any errors are reported, please notify [support-skywire\\_ww@oracle.com](mailto:support-skywire_ww@oracle.com) immediately.

#### NOTE

Any Insbridge services will be stopped during the update.

## Updating the Component Services

Before installing the RateManager patch, you should update the component services.

1. Click **Start>Programs>Administrative 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.

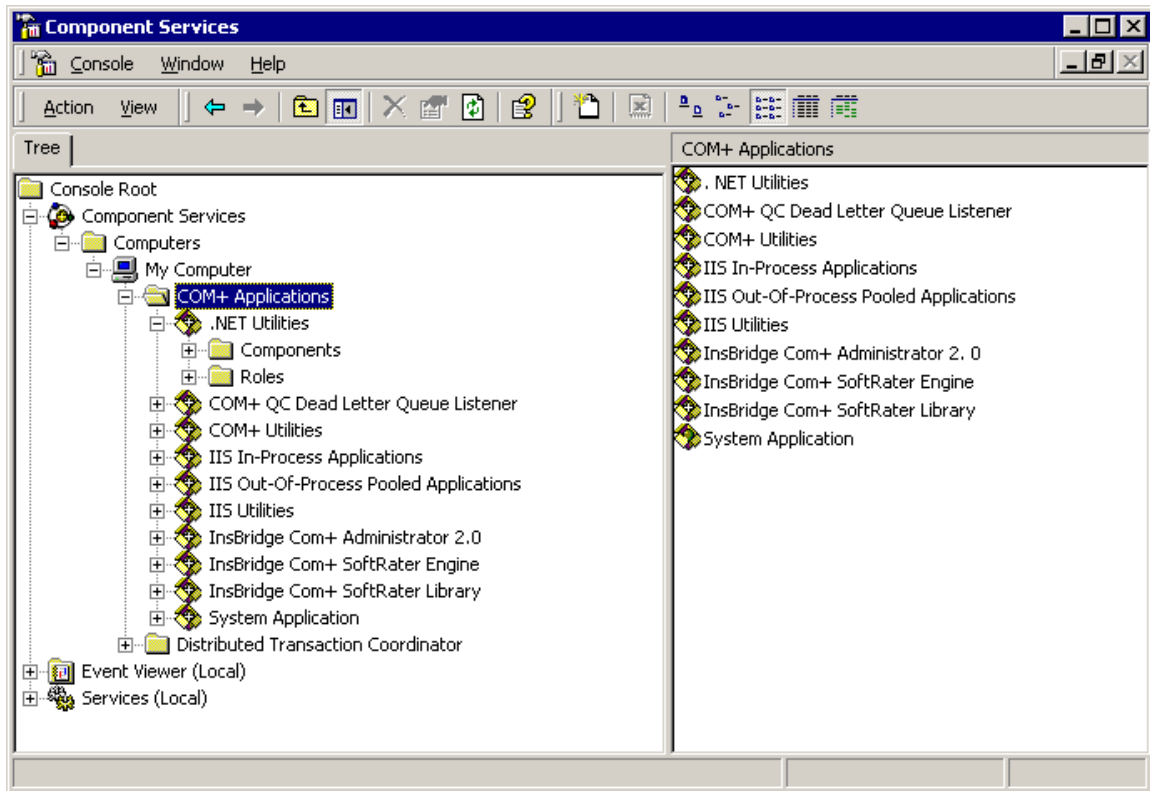


Figure 4 Component Services

There should be 3 Insbridge Com+ Applications libraries:

- Insbridge Com+ Administrator 2.0
- Insbridge Com+ SoftRater Engine
- Insbridge Com+ SoftRater Library

Please note that you will 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. If you change the password, you will have to change the password in all three of the Insbridge Com+ libraries. On each library, right click, select Properties, select the Identity tab, enter in the new password.

**NOTE**

If any COM+ library is missing, run the IBFA patch install again from the msi file and choose uninstall. Then rerun the IBFA patch install and then check again to see if all the libraries are listed. If they are still not listed, notify [support-skywire\\_ww@oracle.com](mailto:support-skywire_ww@oracle.com).

## RateManager Patch Installation

---

The next step is to run the RateManager Patch. Patches need to be run from the server where the IBFA is located.

1. Install the RateManager patch by double-clicking the RateManager patch MSI.

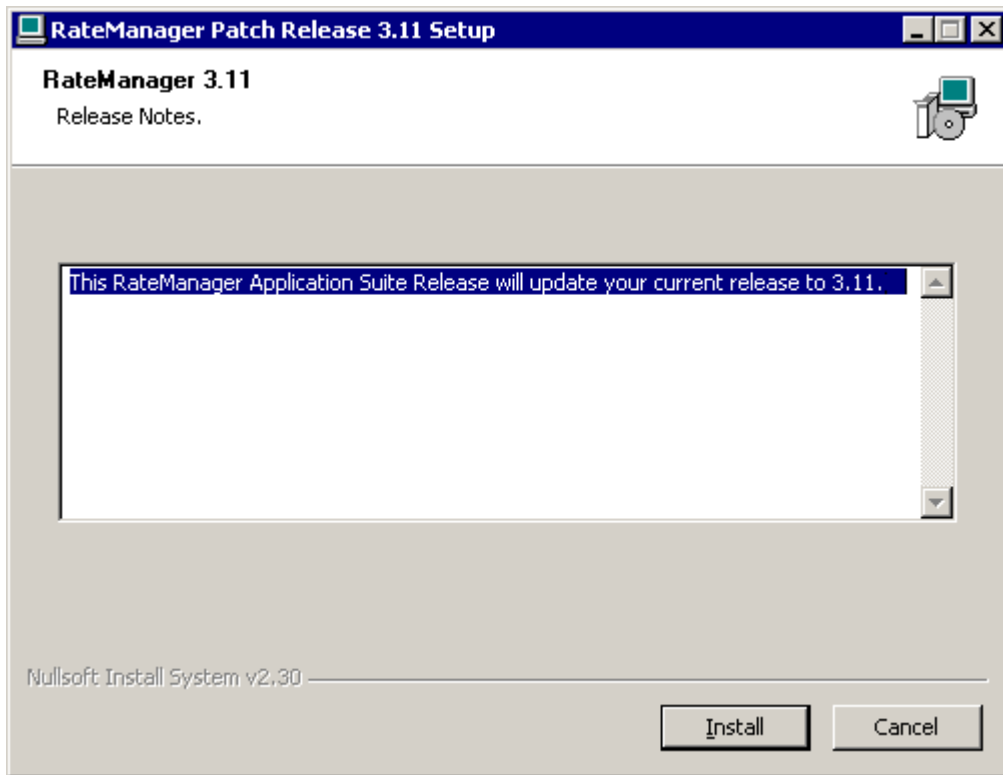


Figure 5 Verifying RateManager Patch

2. A verification screen will be displayed. If this information is correct, click **Install** to continue. If the information is incorrect, please contact support.
3. An information screen will be displayed. The update will begin modifying the application. A progress screen will be displayed.

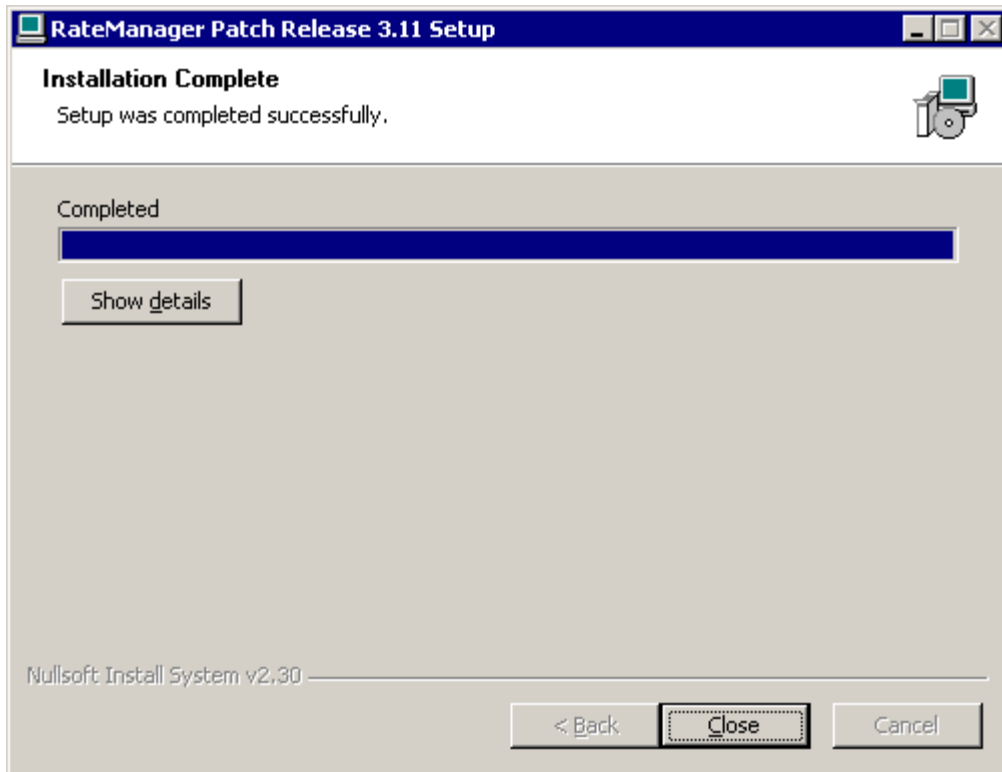


Figure 6 Completed RateManager Patch Installation

4. Click **Close**. The update should complete successfully.

If any errors are reported, please notify [support-skywire\\_ww@oracle.com](mailto:support-skywire_ww@oracle.com) immediately.

**NOTE** Any Insbridge services will be stopped during the update.

The next step is database updates.

**IMPORTANT**

It is strongly recommended that any database modification be performed by a qualified database administrator (DBA). The database setup procedures and tasks require the skill set of a database administrator. If you are not a database administrator, please stop. Improper setup may result in unwelcome changes to the database. Please consult with a qualified database administrator before proceeding.

## IBRU Database Updates

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In the Framework Administrator and RateManager DBs folders you will find database update scripts. These scripts should be run after the patch installation.

- **Framework Administrator update scripts.** In the Framework Administrator download files, retrieve the database update scripts `usp_IBSR_v03.11.xx` OR, if using an Oracle database, `usp_IBSR_v03.11.xx.oracle` from the DBs folder. Where `xx` is the latest release number. The IBSR database update will need to be run once, regardless of version, in the corresponding database.
- **RateManager update scripts.** In the RateManager download files, retrieve the database update scripts `usp_IBRM_v03.11.xx` and `usp_IB_CLIENT_v03.11.xx`. Where `xx` is the latest release number. The RateManager database update scripts will take previous IBRM and IB\_CLIENT databases from **version 3.10 to version 3.11 only**.

### NOTE

Oracle database updates must be performed directly on the Oracle database by an Oracle DBA. Improper scripts updates can result in database failures. Oracle database updates are not available on RateManager.

### To Perform Database Updates from RateManager

The preferred method of updating the IBRM and IB\_CLIENT databases is to go into 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 screen. If these privileges are not in place, an error message will be displayed. See Running Database Updates in RateManager for instructions.

### NOTE

If you need to go from a lesser version, such as 3.9, you will have to enter RateManager and run the 3.10 and 3.11 update scripts successively from there.

### For SQL 2000:

The DBA or a person with the proper permissions will need to apply the database update using Query Analyzer to the database listed in the SQL script name. For example: `usp_IBRM_v03.11.xx.sql` is applied to the IBRM database whereas `usp_IBSR_v03.11.xx.sql` would be applied to your IBSR\_ database.

You can use this method if you are updating the IBRM and IB\_CLIENT databases from IBRU 3.10 to IBRU 3.11 only. You must use this method to update the IBSR database.

### NOTE

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

If you are unsure how to work with databases, please consult with your database administrator.

### NOTE

When using Query Analyzer, the SQL scripts must run on each individual database as shown below.

1. **Open up the DB script updates** from the download file. You can open in any program you want, such as Notepad.

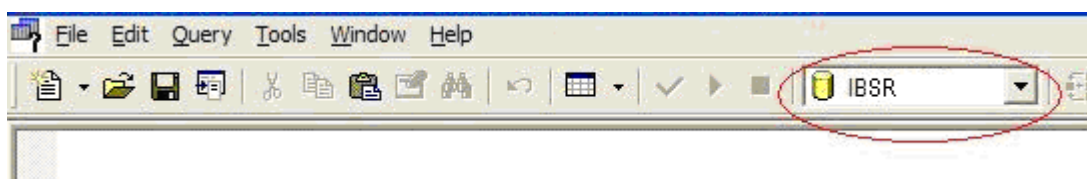


Figure 7 Updating Database

2. Select the IBSR database from the drop down menu. In SQL Server, create a new query with Query Analyzer.
3. The query screen will be displayed.
4. Copy the usp\_IBSR\_v03.11.xx.sql from Notepad and paste onto the query screen.
5. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen.
6. If you want to update the IBRM database in SQL Server, select the IBRM\_ database from the drop down menu. In SQL Server, create a new query with Query Analyzer.
7. The query screen will be displayed.
8. Copy the usp\_IBRM\_v03.11.xx.sql from Notepad and paste onto the query screen.
9. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen.
10. If you want to update the IB\_CLIENT database in SQL Server, select the IB\_CLIENT database from the drop down menu. In SQL Server, create a new query with Query Analyzer.
11. The query screen will be displayed.
12. Copy the usp\_IB\_CLIENT\_v03.11.xx.sql from Notepad and paste onto the query screen.
13. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen.

The patch is now properly applied and users can log back in to the system.

#### NOTE

If you receive errors after running the patch, try uninstalling the IBFA patch (from the msi file) and then rerun the IBFA patch install to see if that solves the problem. If it doesn't, please contact [support-skywire\\_ww@oracle.com](mailto:support-skywire_ww@oracle.com).

If you are updating from a lesser version, such as 3.9, you must enter RateManager to perform the updates.

### For SQL 2005:

The DBA or a person with the proper permissions will need to apply the database update using Query Analyzer to the database listed in the SQL script name. For example: usp\_IBRM\_v03.11.xx.sql is applied to the IBRM database whereas usp\_IBSR\_v03.11.xx.sql would be applied to your IBSR\_ database.

You can use this method if you are updating the IBRM and IB\_CLIENT databases from IBRU 3.10 to IBRU 3.11 only. You must use this method to update the IBSR database.

#### NOTE

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

If you are unsure how to work with databases, please consult with your database administrator.

#### NOTE

When using Database Engine Query, the SQL scripts must run on each individual database as shown below.

1. **Open up the DB script updates** from the download file. You can open in any program you want, such as Notepad.

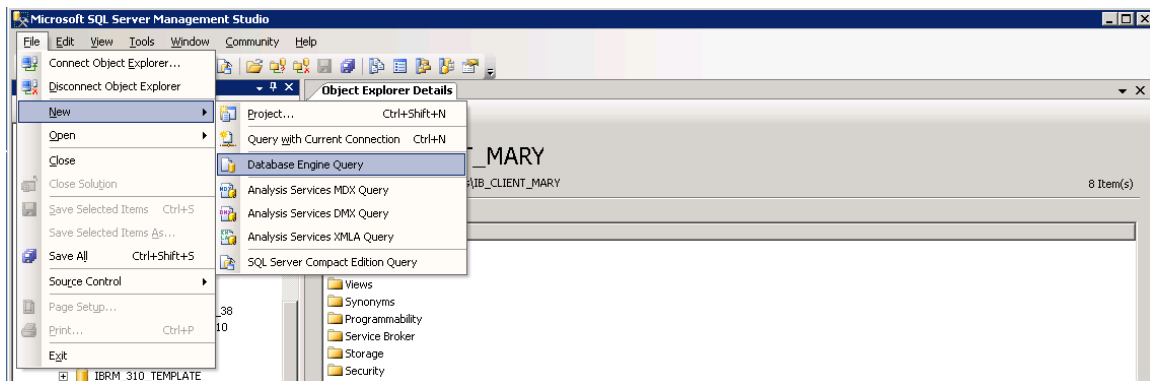


Figure 8 Updating Database

2. Select the IBSR database. In SQL Server Management Studio, create a new Database Engine Query, **File>New>Database Engine Query**.
3. The query screen will be displayed on the right hand side.
4. Copy the usp\_IBSR\_v03.11.xx.sql from Notepad and paste onto the query screen.
5. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen.
6. If you want to update the IBRM database in SQL Server, select the IBRM\_ database. In SQL Server Management Studio, create a new Database Engine Query, **File>New>Database Engine Query**.
7. The query screen will be displayed on the right hand side.
8. Copy the usp\_IBRM\_v03.11.xx.sql from Notepad and paste onto the query screen.



9. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen.
10. If you want to update the IB\_CLIENT database in SQL Server, select the IB\_CLIENT database. In SQL Server Management Studio, create a new Database Engine Query, **File>New>Database Engine Query**.
11. The query screen will be displayed on the right hand side.
12. Copy the usp\_IB\_CLIENT\_v03.11.xx.sql from Notepad and paste onto the query screen.
13. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen.

The patch is now properly applied and users can log back in to the system.

## NOTE

If you receive errors after running the patch, try uninstalling the IBFA patch (from the msi file) and then rerun the IBFA patch install to see if that solves the problem. If it doesn't, please contact [support-skywire\\_ww@oracle.com](mailto:support-skywire_ww@oracle.com).

## Running Database Updates in RateManager



The preferred method of updating the IB\_CLIENT and IBRM databases is to go into RateManager and run them from there.

The Updates tab lists all the available database updates for this version of RateManager. From this tab you can view the update script or execute the update. Updates cannot be deleted. Updates have to be installed sequentially, meaning if you are on Version 3.8, you must run the 3.9 update, then the 3.10 update and finally the 3.11 update.

1. Navigate to the **Backups** tab.
2. Click the **Updates** tab. Select the database you want to view from the **Show updates for** drop down. The database updates will be listed. The last column, the **Status** column, will show you which update is the **Current** one installed.

Backups		Updates		
Refresh Listing		Execute Update Script	Open Update Script	
Show updates for:		IBRM		
Script	Release Date	Database	Status	
v03.10.2.00	10/30/2008	IBRM	Current	
v03.10.0.00	8/31/2008	IBRM		
v03.9.0.00	5/19/2008	IBRM		
v03.8.0.00	6/7/2007	IBRM		
v03.7.0.00	7/28/2006	IBRM		

Figure 9 Available Updates

- To execute an update, highlight the update you want to run. Click  **Execute Update Script**. A warning message will be displayed. Click **OK** to run the update or **Cancel** to return to the previous screen.
- To view the update script prior to execution, highlight the update you want to view. Click  **Open Update Script**. The update script will be displayed in a separate screen.

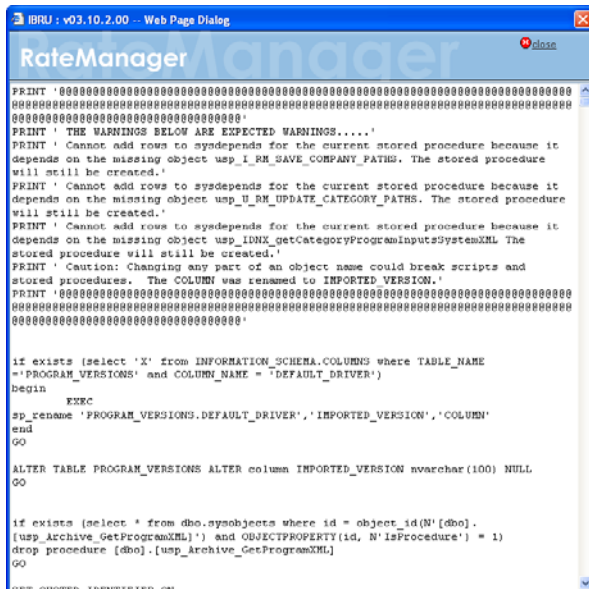


Figure 10 Script Viewer

Some warning messages may be displayed, i.e.: "Cannot add rows to sysdepends for the current stored procedure" This is normal and can be disregarded.

## Converting from SoftRater 3.x to SoftRater 3.11

The only upgrade needed to perform for SoftRater is adding the new stored procedures on all of the IBSR databases. This can be accomplished by opening Query Analyzer and connecting to the IBSR database. Then run the included SQL script `usp_IBSR_v03.11.sql` available in the install download. If the script is not included, then it has been run.

## Converting from RateManager 3.x to RateManager 3.11

If you are converting from RM3.x (version 6, 7, or 8) to RM311, the IBRU system does not utilize any of the same components or webs as the previous released version. Therefore, the only part of RM3.x that needs to be converted is the IBRM xxxx database.

Before performing the conversion, please ensure that a good backup of the IBRM\_xxxx database exists and is available in the event that the conversion utility fails.

## Steps to Perform an Upgrade

---

1. Backup and move off the server a good backup of the IBRM\_XXXX database for safekeeping.
2. Perform the installation as described above for RM311. Since RM3.x was installed previously, all of the dependencies for RM311 should already be installed.

### NOTE

Install the new Framework into a different location than the old location of the Framework. I.e.: If the old Framework was installed to C:\Insbridge\Framework, then use C:\Program Files\Insbridge as the new location of the Framework and RM311 or vice versa.

3. During the database installation, you will not need to attach the IBRM\_XXXX database, but you will need to attach the IB\_CLIENT database and assign the proper users as described above.
4. Set up your connections as described above using IBFA.
5. Return to RateManager. Database updates must be performed in RateManager on the Tools>DataBase>Updates screen. The Updates tab lists all the available database updates for this version of RateManager. From this tab you can view the update script or execute the update. Updates cannot be deleted. Updates have to be installed sequentially, meaning if you are on Version 3.8, you must run the 3.9 update, then the 3.10 update and finally the 3.11 update
6. If updating from RateManager version 3.6, you will begin with the 3.7.update to add all the new stored procedures. Then proceed with 3.8 update and so on until you reach 3.11.
7. You should now be able to login to RM311.

### NOTE

Some warning messages may be displayed, i.e.: "Cannot add rows to sysdepends for the current stored procedure" This is normal and can be disregarded.

## Database Migrations in RateManager

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Database migrations can be performed in RateManager at any time. It is strongly recommended that migrations be performed by a qualified DBA. If you are unsure about migrating a database, please be sure to create a full backup first. Next, remember that you will have to delete the users and then re-create them in the new location after you restore.

If during the installation or configuration of the Insbridge Rating and Underwriting Solution you receive an error or need a question answered, please contact Support at [support-skywire\\_ww@oracle.com](mailto:support-skywire_ww@oracle.com).

**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](http://oracle.com)

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