

Oracle Insurance IBRU Full Installation Guide

Version 3.11

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Insbridge Rating and Underwriting Full Installation Guide Edition

Version 3.11

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Oracle Insurance Insbridge Rating and Underwriting Full Installation Guide

Preface

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting Full Installation Guide*. The Insbridge Rating and Underwriting (IBRU) 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 Insbridge Rating and Underwriting system is a web-based application with a database backend that can be configured to utilize many different and complex configurations. This document is meant to help with a new installation of the Insbridge Rating and Underwriting System. Information regarding updates can also be found inside this guide.

Audience

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

SoftRater Node Installation

There are various methods used to deploy IBRU. It is recommended that at least two environments be setup, one for development and testing and one for production. A preferred setup is to have three environments, one for development, one for testing and one for production.

Each environment can have its own configuration and database structure. For example, it is required that you have RateManager and Insbridge Framework Administrator (IBFA) on the same Windows machine in development. However, when you move in to production you may want have IBFA on a separate machine with an Oracle database.

To allow for packages to be moved from environment to environment, it is necessary to have a SoftRater Node install. A SoftRater Node installation is required when you have IBFA and RateManager on separate machines and you want to load packages from one environment to another. The SoftRater node is installed on the receiving IBFA.

If performing a SoftRater node install, the following document also can be used.

Steps that don't need to be performed for a SoftRater node installation are marked as not required and colored red.

E-Delivery

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

New editions incorporate any updates issued since the previous edition.

| Edition | Publication Number | Product Version | Publication Date | Comment |
|--------------------------|---------------------------|------------------------|-------------------------|---|
| 1 st Edition | P01-701-01 | | 03/28/2005 | Updated for new layout / Windows 2003 |
| 2 nd Edition | P01-701-02 | | 04/14/2005 | New layout, updated ASPNET user permissions req |
| 3 rd Edition | P01-701-03 | V 3.6 | 03/14/2006 | Update |
| 4 th Edition | P01-701-04 | V 3.7 | 09/28/2006 | Update |
| 5 th Edition | P01-701-05 | V 3.8 | July 2007 | Update |
| 6 th Edition | P01-701-06 | V 3.8.3 | October 2007 | Update |
| 7 th Edition | P01-701-07 | V 3.8.5 | November 2007 | Update |
| 8 th Edition | P01-701-08 | V 3.8.7 | January 2008 | Update |
| 9 th Edition | P01-701-09 | V 3.8.8 | March 2008 | Update |
| 10 th Edition | P01-701-10 | V 3.9 | May 2008 | Update |
| 11 th Edition | P01-701-11 | V 3.10 | September 2008 | Update |
| 12 th Edition | P01-701-12 | V 3.11 | December 2008 | Update |

Checklist of Requirements and Procedures

The following checklist can be used to help in installing and configuring a SoftRater node.

- ☐ **Check Web Server for needed dependencies**
 - ☐ IIS Installed
 - ☐ MSMQ
 - ☐ Microsoft .NET Framework version 2.0
- ☐ **Check Database Server for needed requirements**
 - ☐ Proper Network Connection to Database Server
 - ☐ Mixed Mode Authentication
 - ☐ Not using NT Fibers
 - ☐ Collation and Sort Order Supported
- ☐ **Create Insbridge Local User Account**
 - ☐ Insbridge User Account Name: _____
 - ☐ Insbridge User Account Password: _____
- ☐ **Install Insbridge Framework**
 - ☐ Set full permissions for the Insbridge user Registry Access
 - ☐ Set full permissions for the Insbridge user Temp Folder for MSMQ
 - ☐ Set full permissions for the Insbridge user to the Insbridge folder
- ☐ **Attach IBSR and IB_CLIENT database on the SQL Server**
 - ☐ Insbridge SoftRater Database Name: _____
 - ☐ Insbridge IB_CLIENT Database Name: _____
 - ☐ Databases Owner User Account: _____
 - ☐ Databases Owner User Password: _____
 - ☐ Assign Database User Account as db_owner to IBSR database
- ☐ **Configure IBFA**
 - ☐ Add Subscriber ID
 - ☐ Add Database Connection for **controller** pointing to the IB_CLIENT database
 - ☐ Add Database Connection for **security** pointing to the IB_CLIENT database
 - ☐ Add SoftRater Environments for loading of SRPs and rating
- ☐ **Apply IBFA Patch**
 - ☐ Update component services
- ☐ **Import the registry key from RateManager server**

The following checklist can be used to help in installing and configuring the IBRU system.

- ☐ **Check Web Server for needed dependencies**
 - ☐ IIS Installed
 - ☐ MSMQ
 - ☐ Microsoft .NET Framework version 2.0
 - ☐ JRE
- ☐ **Check Database Server for needed requirements**
 - ☐ Proper Network Connection to Database Server
 - ☐ Mixed Mode Authentication
 - ☐ Not using NT Fibers
 - ☐ Collation and Sort Order Supported
- ☐ **Create Insbridge Local User Account**
 - ☐ Insbridge User Account Name: _____
 - ☐ Insbridge User Account Password: _____
- ☐ **Install Insbridge Framework**
 - ☐ Set full permissions for the Insbridge user Registry Access
 - ☐ Set full permissions for the Insbridge user Temp Folder for MSMQ
 - ☐ Set full permissions for the Insbridge user to the Insbridge folder
- ☐ **Install RateManager Application**
- ☐ **Attach IBRM, IBSR and IB_CLIENT database on the SQL Server**
 - ☐ Insbridge RateManager Database Name: _____
 - ☐ Insbridge IBSR Database Name: _____
 - ☐ Insbridge IB_CLIENT Database Name: _____
 - ☐ Databases Owner User Account: _____
 - ☐ Databases Owner User Password: _____
- ☐ **Configure IBFA**
 - ☐ Add Subscriber ID
 - ☐ Add Database Connection for **controller** pointing to the IB_CLIENT database
 - ☐ Add Database Connection for **security** pointing to the IB_CLIENT database
 - ☐ Add Database Connection for **rm** pointing to the IBRM_xxxx database
 - ☐ Add Default RateManager Environment for Rating in Scenario Manager
 - ☐ Configure the Default RateManager Environment
- ☐ **Apply IBFA Patch**
 - ☐ Update component services
- ☐ **Apply RM Patch**
- ☐ **Perform IBRU database updates**
- ☐ **Export and backup Insbridge registry key for safe storage**
- ☐ **Login to RateManager using USERNAME and PASSWORD**

Requirements

Server Requirements

A full installation of Microsoft Windows 2000 (either Server or Advanced Server) or Windows Server 2003 is required. The following configuration assumes that the administrator of the server to be generally familiar with managing a Windows 200x server.

Required Components

All Windows Server components are available for installation from the Control Panel, Add/Remove Programs applet by selecting Add/Remove Windows Components. In order to install these Windows Components, you may be required to have the Windows Installation files available. The following components are required:

- **IIS – Internet Information Services**
 - Version 5.0 for Windows 2000
 - Version 6.0 for Windows 2003
- **MSMQ – Microsoft Message Queuing Services**
- **Microsoft .NET Framework, version 2.0**
- **JRE – Java Runtime Environment** (not required for a SoftRater only install)

Internet Information Services (IIS) 5.0

Required for Windows 2000. The Insbridge Rating and Underwriting System is a web based application and requires IIS to be installed before the Insbridge Rating and Underwriting System installation to facilitate the default web virtual directories creations.

The subcomponents of IIS needed by the Insbridge Rating and Underwriting System:

- Common Files
- Documentation
- Internet Information Services Snap-In
- SMTP Service – Although not required, the SMTP service will allow the Insbridge Rating and Underwriting System to notify users via email when extended jobs have been completed. If the SMTP service is located on a corporate network, then the service must be properly configured for authorization to relay mail internally to a smart host. Please check with your information services support group for proper configuration.
- World Wide Web Server

Internet Information Services (IIS) 6.0

Required for Windows 2003. The Insbridge Rating and Underwriting System is a web based application and requires IIS to be installed before the Insbridge Rating and Underwriting System installation to facilitate the default web virtual directories creations.

The subcomponents of Application Server needed by the Insbridge Rating and Underwriting System:

- Application Server Console
 - ASP.NET
 - Enable network COM+ access
 - Internet Information Services (IIS)
 - Common Files (default)
 - SMTP Service – Although not required, the SMTP service will allow the Insbridge Rating and Underwriting System to notify users via email when extended jobs have been completed. If the SMTP service is located on a corporate network, then the service must be properly configured for authorization to relay mail internally to a smart host. Please check with your information services support group for proper configuration.
 - World Wide Web Service
 - Active Server Pages
 - World Wide Web Service
- Message Queuing
- Active Directory Integration (default)
- Common (default)

After installing IIS, Active Server Pages and ASP.NET v2.0.xxxx must be enabled in order for the IBRU applications to work.

1. Open Internet Information Services (IIS) Manager in the administration tools.
2. Select the Web Service Extensions on the left hand side and make sure they are **Allowed** as shown below:

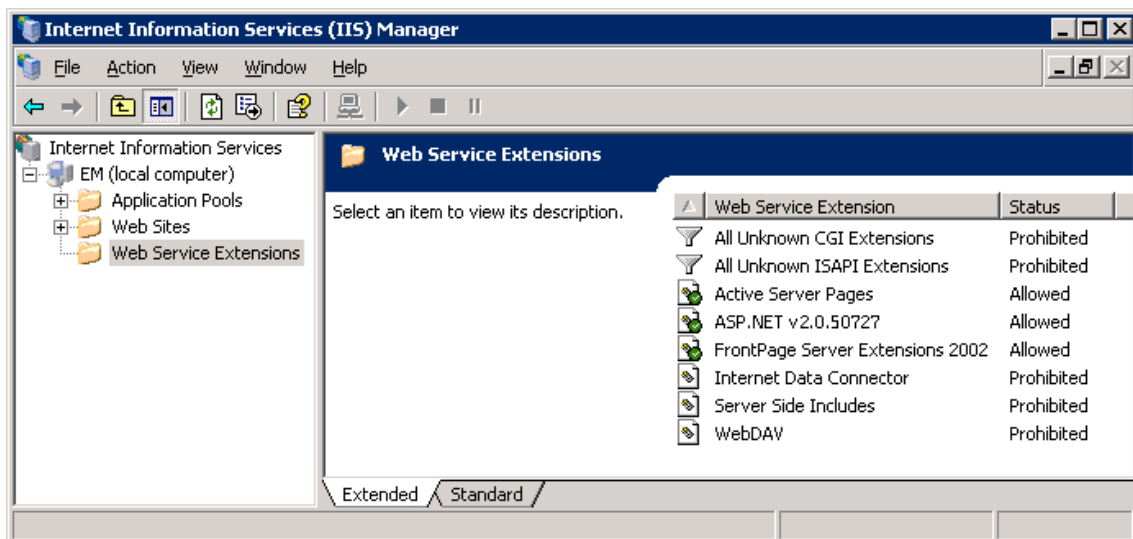


Figure 1 Enabling Active Server Pages and ASP.NET v2.0

Message Queuing Services

Required for Windows 2000 and Windows 2003. The Insbridge Rating and Underwriting system utilizes the Microsoft Message Queuing Service (MSMQ) for batching jobs and other types of extended functions. The Microsoft Messaging Queuing Service can be configured for stand-alone operation without need to access any Active Directory unless specified by your information support services. The Insbridge Rating and Underwriting System utilizes by default private message queues that have no need for routing.

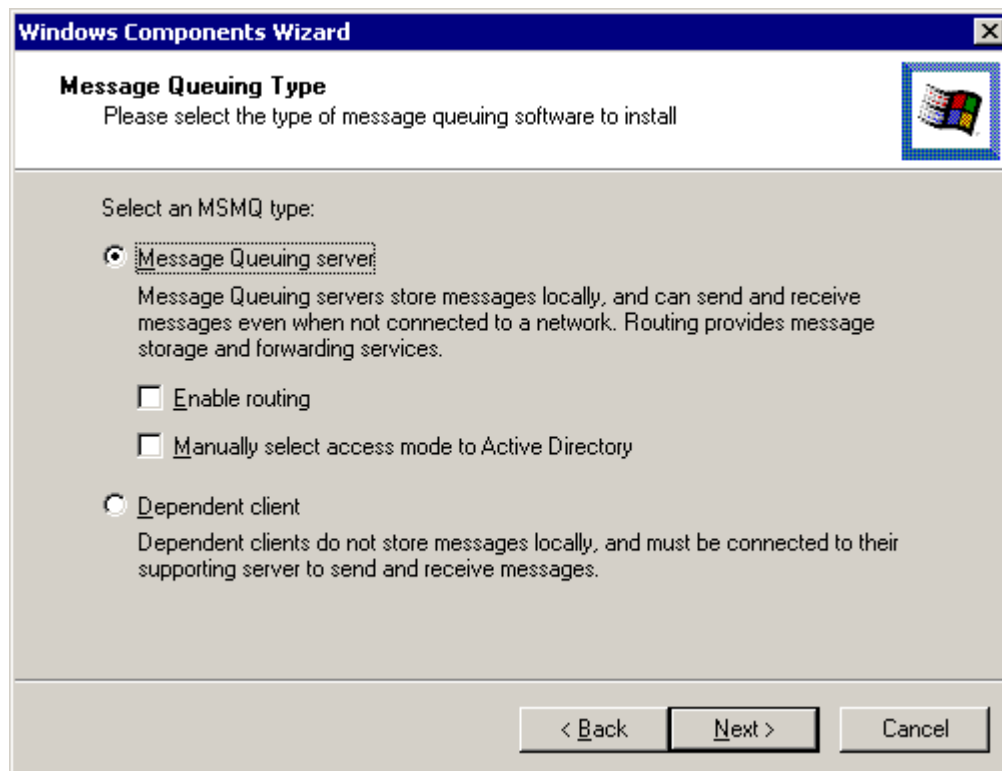


Figure 2 Message Queuing Type

Microsoft .NET Framework

Required for Windows 2000 and Windows 2003. The installation application attempts to install all necessary dependencies that may be missing on the IBRU web host and will attempt to install the Microsoft .NET 2.0 Framework from the web. In some corporate environments, external access to download the Framework may not be allowed. Therefore, we would suggest installing the Microsoft .NET Framework version 2.0 prior to starting the Insbridge Rating and Underwriting System install. This can be obtained from Microsoft's website or from using Microsoft's Windows Update.

We also highly recommend installing the .NET Framework after installing IIS in order to update all the web applications to utilize the ASPNET system. This can be double checked by opening Internet Service Manager and right clicking the Default Web Site, selecting properties, then select the Home Directory tab. Press the Configuration... button and scroll down to the bottom.

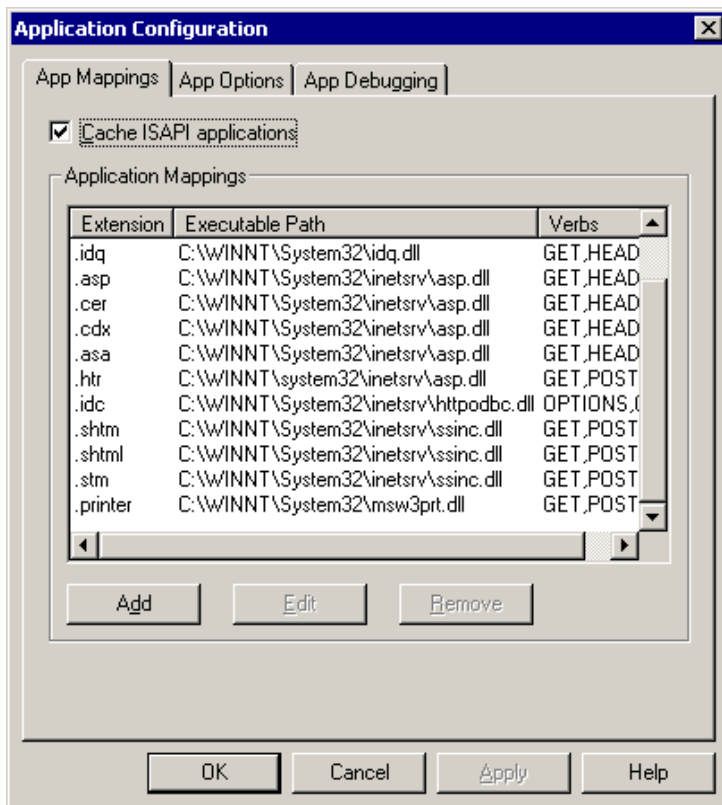


Figure 3 Installing .NET Framework

If you don't see any of the ASPNET extensions (.asax, aspx, .asmx, etc.) pointing to %WINDIR%\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll, then the .NET framework was probably installed prior to installation of IIS.

In order to install the ASPNET ISAPI extensions use the aspnet_regiis.exe located in the Framework\v2.0.50727 folder. If you want to upgrade all default web applications under IIS to use the 2.0 framework ASPNET ISAPI, use the following syntax:

```
C:\WINNT\Microsoft.NET\Framework\v2.0.50727>aspnet_regiis.exe -i
```

- i - Install this version of ASP.NET and update script maps at the IIS metabase root and for all script maps below the root. Existing script maps of lower version are upgraded to this version.

Please see page 71 in regards to the permissions required by the local ASPNET user account.

Installing Java Runtime Environment for PDF creation

This dependency is not required for a SoftRater node installation.

Required for Windows 2000 and Windows 2003. However, in order to create reports as PDF files from the RateManager web interface, the Java Runtime Environment version 1.4 or above must be installed on the web server. The JRE can be downloaded from the

<http://www.java.com/en/download/>

Special Considerations for Windows Server 2003

Microsoft has identified some known issues with Windows Server 2003. Oracle Insurance is aware that these issues may surface during the installation of Insbridge Rating and Underwriting System, depending upon your network setup and choice of operating system. Oracle Insurance offers the following solutions for known issues. Please discuss and involve your System Administration Group or IT Department prior to making any change. The suggestions listed below will allow the Insbridge Rating and Underwriting System to function in most environments. Oracle Insurance makes no claim to knowing what effects these changes may have on other areas of your network.

Prior to making any changes, please consult with your System Administration Group or IT Department and Insbridge support.

FIPS Encryption

PROBLEM: A Windows Server 2003 server with an encryption level set to FIPS Compliant will not allow Remote Assistance connections from a Windows XP box. When you try to connect, you will receive an error message.

SUGGESTED SOLUTION: Disable the FIPS encryption.

There are two ways to enable the FIPS encryption level. If you have to disable the FIPS encryption level for Terminal Services, you must do this by using the same method that you originally used to enable the FIPS encryption level. ¹

Method 1

To disable the FIPS encryption level by changing the **Encryption level** setting in the **RDP-Tcp Properties** dialog box, follow these steps:

1. Click **Start**, click **Run**, type **tscc.msc** in the **Open** box, and then click **OK**.
2. Click **Connections**, and then double-click **RDP-Tcp** in the right pane.
3. In the **Encryption level** box, click to select a level of encryption other than **FIPS Compliant**.

Note If the **Encryption level** setting is disabled when you try to change it, the system-wide setting for **System cryptography: Use FIPS compliant algorithms for encryption, hashing, and signing** has been enabled, and you must disable this system-wide setting by using method 2.

¹ From Microsoft Knowledge Base Article #811770.

Method 2

To use the Group Policy Object to disable FIPS data encryption system-wide, follow these steps:

1. Click **Start**, click **Run**, type **gpedit.msc** in the **Open** box, and then click **OK**.
2. Expand **Computer Configuration**, expand **Windows Settings**, expand **Security Settings**, expand **Local Policies**, and then click **Security Options**.
3. In the right pane, double-click **System cryptography: Use FIPS compliant algorithms for encryption, hashing, and signing**, click **Disable**, and then click **OK**.

Note Encryption level settings in Terminal Server are unavailable when FIPS is enabled.

For more information, please visit <http://support.microsoft.com/kb/811770>.

Distributed Transaction Coordinator (DTC)

PROBLEM: Network DTC access is disabled by default in Windows Server 2003 server. If network DTC access is not enabled, applications can only use transactions that are located on the same box. If you want a client to access the server, you will receive an error message.

SUGGESTED SOLUTION: Enable DTC Access.

Please note that you must restart the server. ²

Steps to enable network DTC access

1. Click **Start**, point to **Control Panel**, and then click **Add or Remove Programs**.
2. Click **Add/Remove Windows Components**.
3. Select **Application Server**, and then click **Details**.
4. Select **Enable network DTC access**, and then click **OK**.
5. Click **Next**.
6. Click **Finish**.
7. Restart the computer.

If you are running Windows Server 2003 SP1, there are additional steps that must be taken. Please see <http://support.microsoft.com/kb/817064/en-us> for more information.

² From Microsoft Knowledge Base Article #817064.

Microsoft SQL Server 2000 or 2005

Microsoft SQL Server does not need to be installed on the same machine where the Insbridge web applications reside. If the SQL Server resides on a separate host from the IBRU web front end, a properly configured network connection from the web server front end to SQL Server must exist. Testing can be performed by using the Data Sources application in Administrative Tools to make a default connection to the database server.

NOTE

We recommend running your IBRU databases on a SQL Server 2005 instance.

Compatibility level:

IBRM_xxxx = SQL Server 2000

IB_CLIENT = SQL Server 2000

IBSR = SQL Server 2000

NOTE

All these settings are available during installation of SQL Server or by using SQL Server Enterprise Manager, and right clicking the server and selecting properties.

If any of these settings conflict with existing application's databases residing on the SQL Server, then a separate instance is required.

Depending on the load expected on the web server, the database can be placed on a separate SQL Server that can either be independent or shared as long as the following conditions are met. All settings are relevant on both SQL Server 2000 and 2005 instances:

- SQL Server must use **Mixed Mode Authentication**.

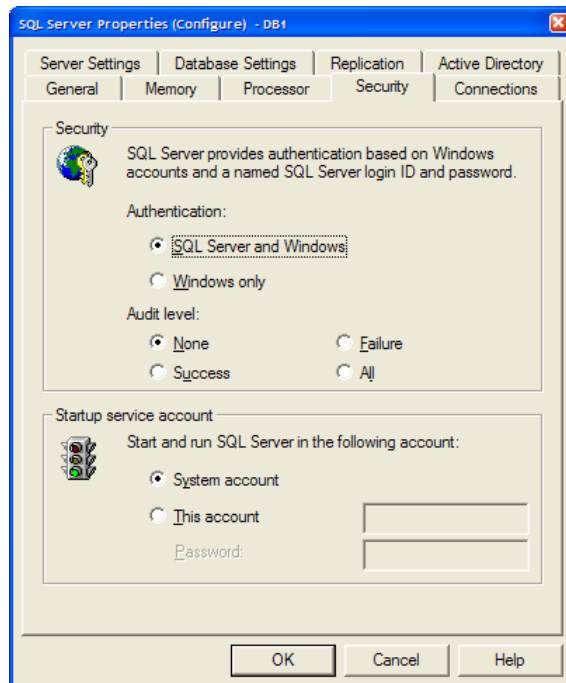


Figure 4 Setting SQL Server

- **NT Fibers** must **not** be enabled (not enabled by default).

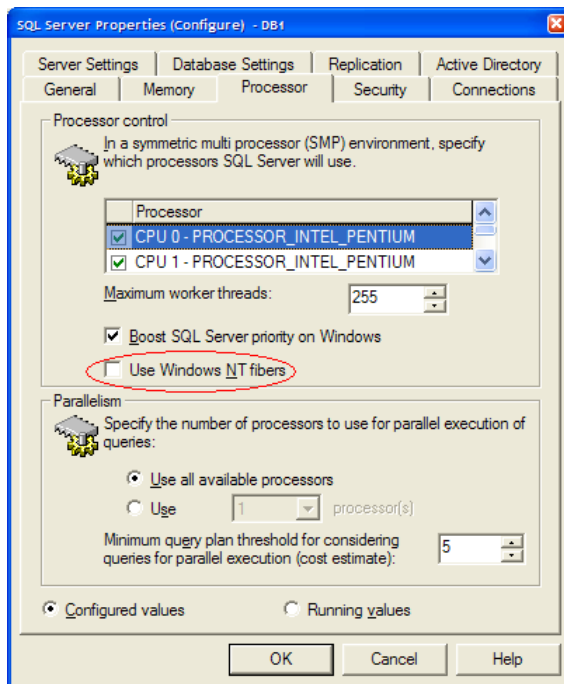


Figure 5 Disabling Windows NT Fibers

- **Collation and Sort Order:** Currently supported are the default SQL Server collation and sort order plus case sensitivity using Latin1_General_BIN as the server collation. Check with Insbridge for any questions regarding database server sort orders or collations.

NOTE

For SQL Server 2005, please make sure the SQL Server Client is installed.

MDAC 2.8

If the Insbridge Rating and Underwriting application is split between a web server and a database server, then Microsoft's Data access component version 2.8 needs to be installed on the web front-end server.

NOTE

MDAC version 2.8 or greater is required for the IBFA for SQL Server 2000.

MDAC version 2.8 is included with Windows Server 2003.

To check to see if MDAC is installed, go to: Start>Control Panel>Add or Remove Programs and scroll through the list. If it is not installed, you can download it from Microsoft's web site.

Insbridge Local User Account Setup

Before starting the installation, create a local user account where the Insbridge Framework is being installed. This user needs to be a member of the Users group and requires certain privileges in order to fully control the entire IBRU environment. For ease of installation and if the server is dedicated to the Insbridge Rating and Underwriting System, we suggest adding this user to the local machine Administrators group.

To create a new user:

1. Right click the My Computer icon on the desktop.
2. Select Manage from the drop down list.
3. Select Local Users and Groups.
4. Select Users.
5. Right click on the right side of the screen.
6. Select New User.

NOTE

There are some slight variations between Windows 2000 Server and Windows Server 2003. These variations will be pointed out as they occur.

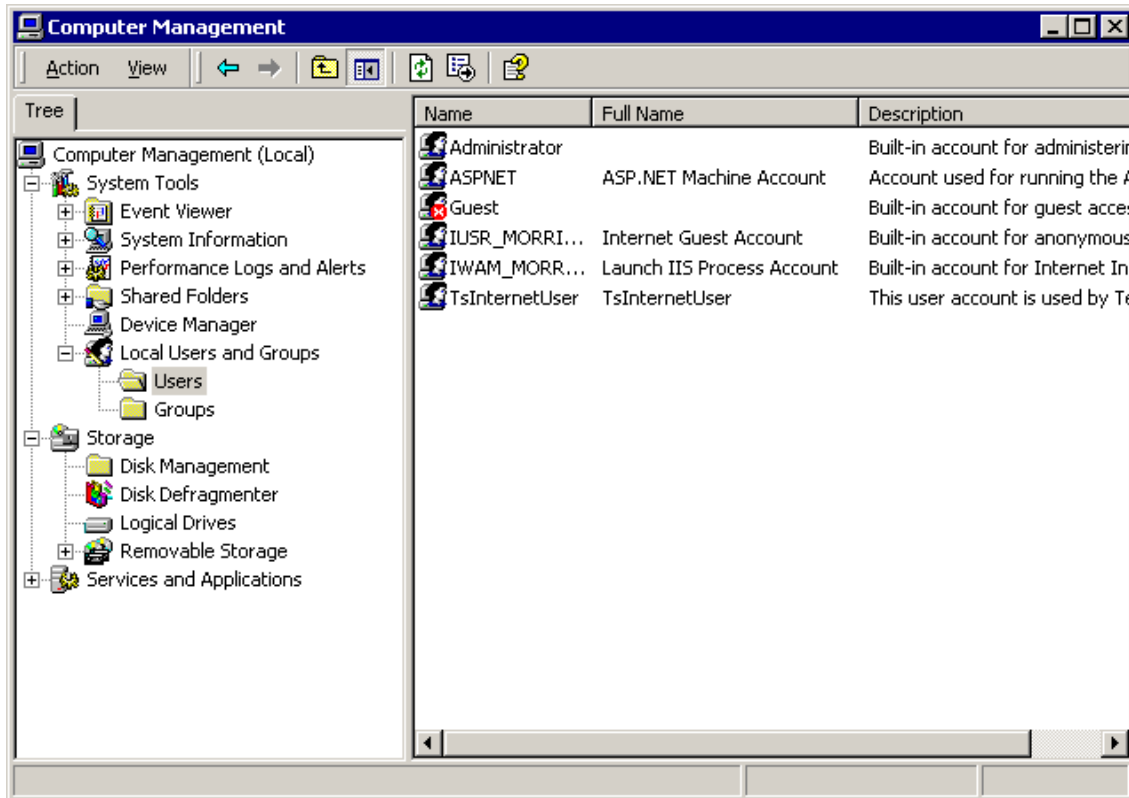
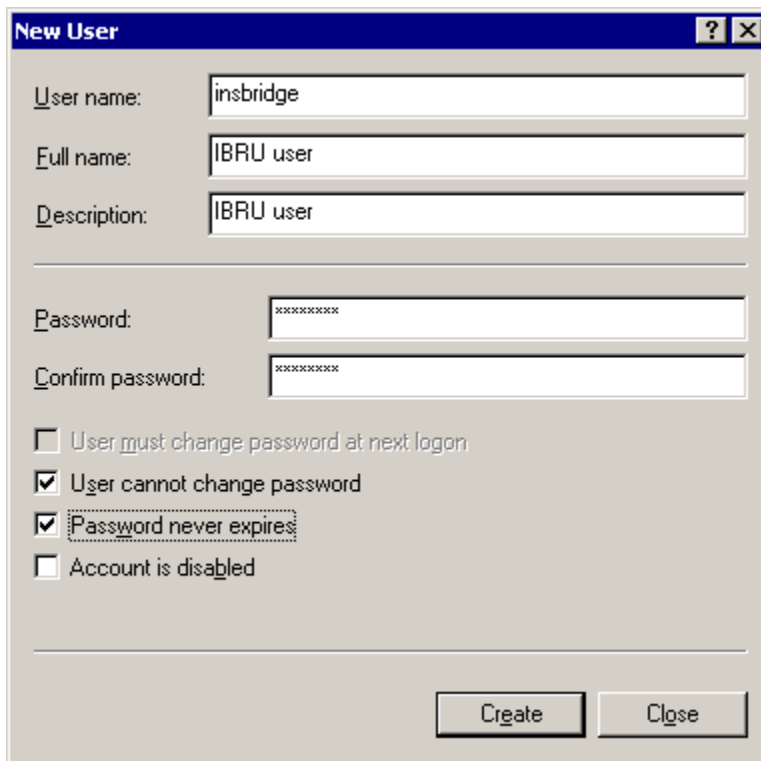


Figure 6 Creating New User

Add a new user using the following information:



The screenshot shows a 'New User' dialog box. The 'User name' field is filled with 'insbridge'. The 'Full name' field is filled with 'IBRU user'. The 'Description' field is filled with 'IBRU user'. The 'Password' and 'Confirm password' fields are masked with 'x'. The 'User cannot change password' and 'Password never expires' checkboxes are checked. The 'Create' and 'Close' buttons are at the bottom right.

Figure 7 Adding User information

The password can be set to any password and the administrator of the Insbridge Rating and Underwriting System must make note of the password for future configuration. For future reference, a space is provided below to store the password.

INSBRIDGE USER PASSWORD: _____

For ease of maintenance of the Insbridge Rating and Underwriting System, this user should not have to change the password and the password should never expire. After this user is created, the user will be assigned to the local Users group. Double check the Users group to make sure the Insbridge user was added. If the Insbridge user is not listed in the Users group, add them at this time. The Insbridge user also can be added to the local Administrators group at this time.

If the Insbridge Rating and Underwriting System is shared and this user cannot be a part of the local administrators groups, additional installation steps must be performed. See page 72.

Please note that if your company requires passwords to be re-set, you will have to make changes to the COM+ Application libraries after you change your password. The installation will automatically apply the Insbridge user name and password 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.

Installation Procedures

The installation must be performed in the following order:

- Start with the Insbridge Framework Administrator installation.
- There are three permissions you must assign before you can continue.
 - Registry Access
 - Temp Folder for MSMQ
 - Insbridge Folder
- Then perform the RateManager installation.
- Creation of the IBRU databases is next. There are three databases that must be in place
 - IB_Client
 - IBRM
 - IBSR
- Configuring the IBFA.
 - Adding your subscriber information.
 - Adding database connections.
 - Adding and defining your environment.
- Applying the IBFA patch.
- Updating Component Services.
- Applying the RateManager patch.
- Performing IBRU database updates.
- Exporting Registry Key.
- Applying advance settings.

It is important to note that RateManager cannot be installed unless the Insbridge Framework Administrator is installed first.

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 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 will be located. The RateManager zip file will contain DB folder, IE7 Users, an Install folder and a Patch folder. Open the Installs folder first.

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

Insbridge Framework Installation

Open the Framework Administrator Installs folder.

During the installation, the installation program requires the installer have administrator rights on the machine where the install is occurring. Please close all open applications and run the InsbridgeApplicationFramework.msi.

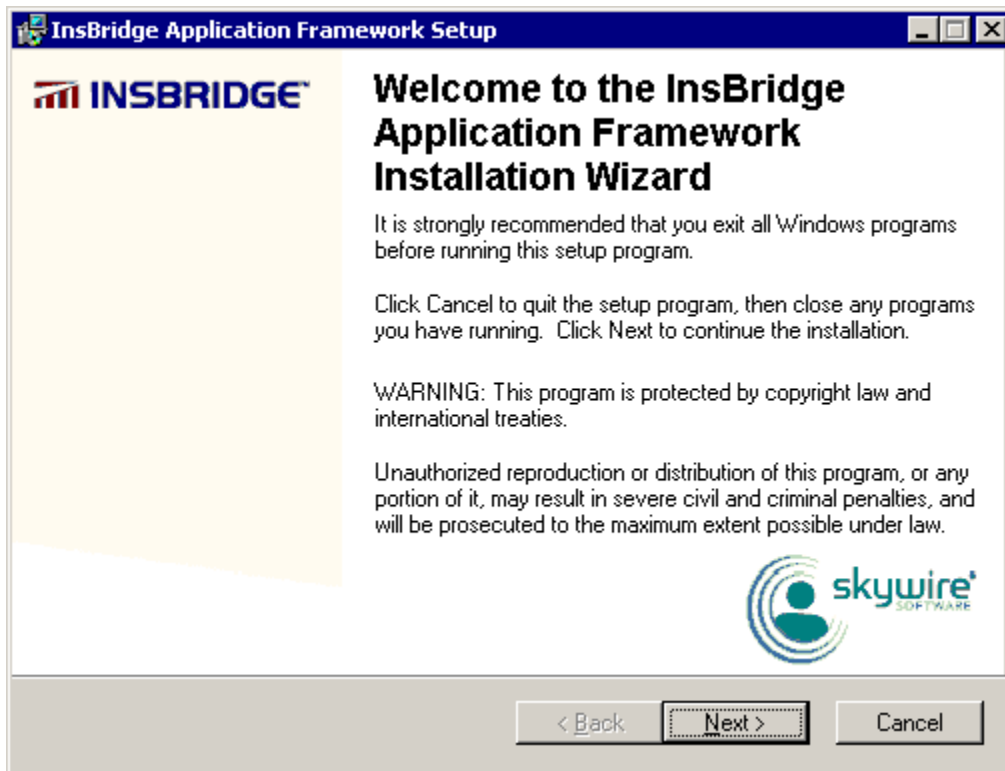
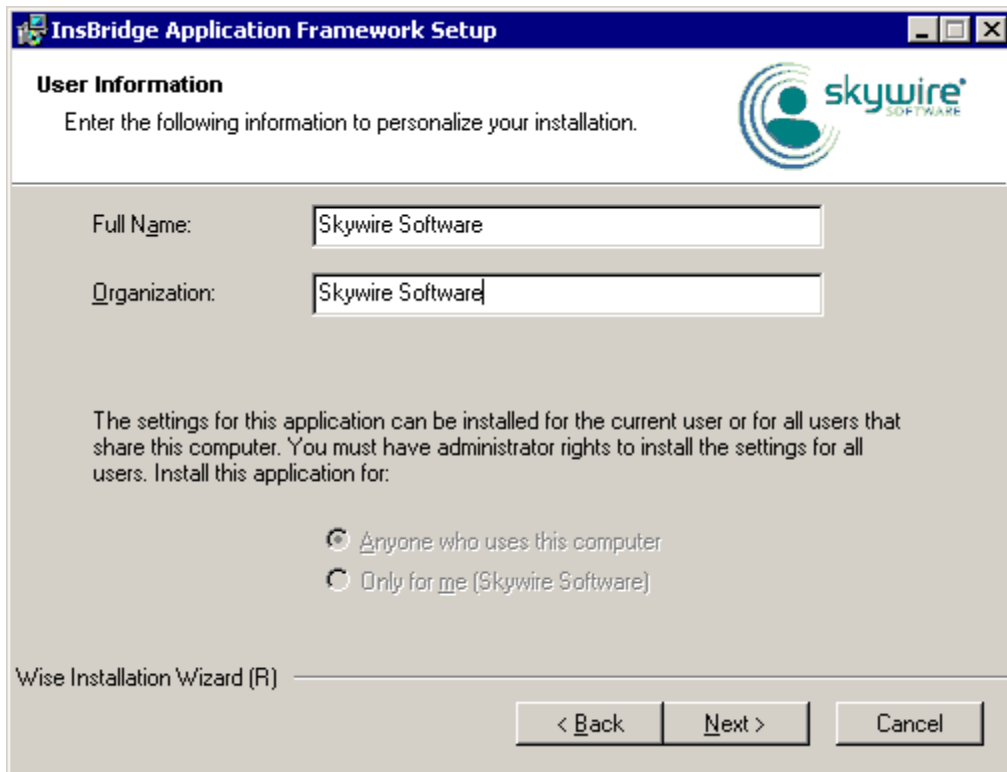


Figure 8 Installing Insbridge

Click on **Next** to continue.

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. These instructions may be followed when performing the Configuration of the Insbridge Framework Components, see page 26. Click **Next** to continue.



InsBridge Application Framework Setup

User Information
Enter the following information to personalize your installation.

Full Name: Skywire Software

Organization: Skywire Software

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

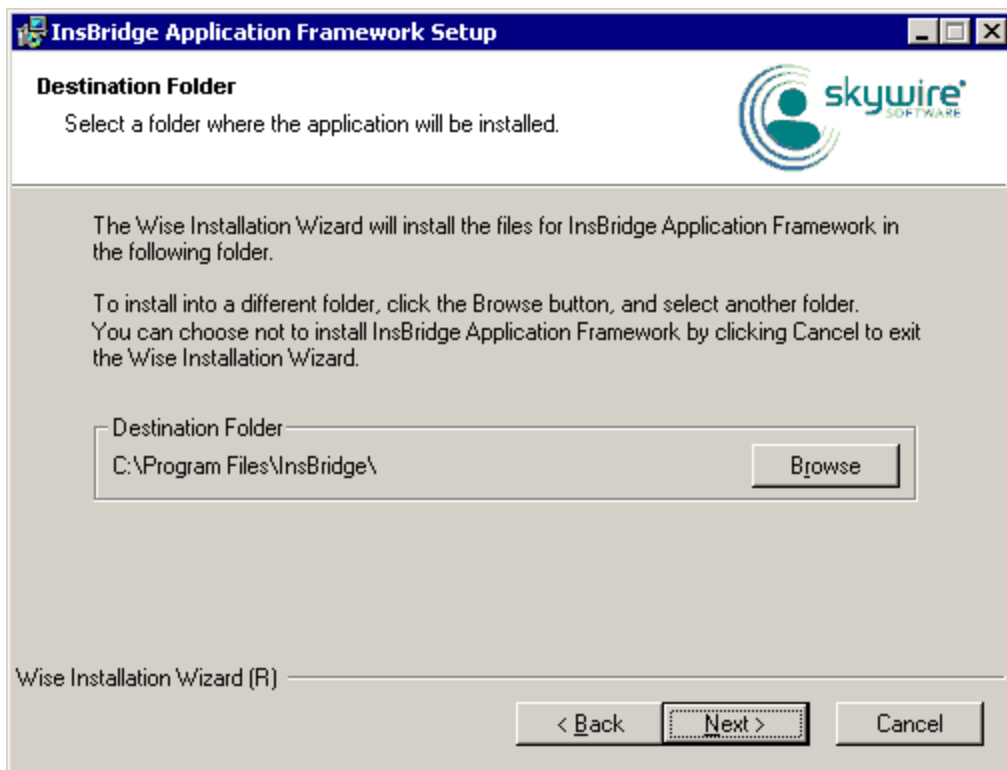
☐ Only for me (Skywire Software)

Wise Installation Wizard (R)

< Back Next > Cancel

Figure 9 Entering User Information for Insbridge

Click **Next** to continue.



InsBridge Application Framework Setup

Destination Folder
Select a folder where the application will be installed.

The Wise Installation Wizard will install the files for InsBridge Application Framework in the following folder.

To install into a different folder, click the Browse button, and select another folder. You can choose not to install InsBridge Application Framework by clicking Cancel to exit the Wise Installation Wizard.

Destination Folder
C:\Program Files\InsBridge\ Browse

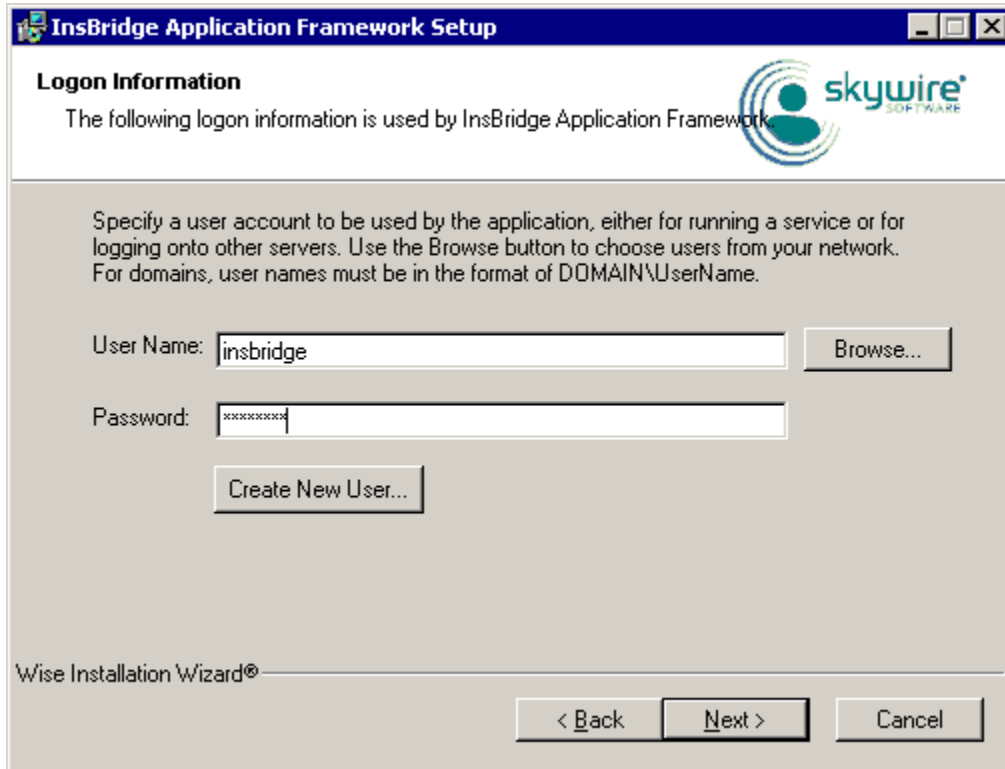
Wise Installation Wizard (R)

< Back Next > Cancel

Figure 10 Entering the Destination Folder for Insbridge

Choose the location where the Insbridge installation will be located. This will be the location for all future installations for Insbridge applications and may be referred as the IBRU_INSTALL_DIR. Click **Next** to continue.

The logon information screen will be displayed. You must specify a user account to be used by the application. You can use the Browse button to select a user or you can create a new user.



The screenshot shows a Windows-style installation window titled "InsBridge Application Framework Setup". The window has a blue header bar with the title and standard window controls. Below the header, the text "Logon Information" is displayed in bold, followed by a sub-header "The following logon information is used by InsBridge Application Framework" and the Skywire Software logo. The main area contains instructions: "Specify a user account to be used by the application, either for running a service or for logging onto other servers. Use the Browse button to choose users from your network. For domains, user names must be in the format of DOMAIN\UserName." Below this, there are two input fields: "User Name:" with the text "insbridge" and a "Browse..." button to its right; and "Password:" with a masked password "xxxxxxxxxx" and an empty space for a second password. A "Create New User..." button is positioned below the password fields. At the bottom of the window, the text "Wise Installation Wizard®" is on the left, and three buttons "< Back", "Next >", and "Cancel" are on the right.

Figure 11 Logon Information

1. Enter the user name and password for the local user account you set up earlier.
2. Click **Next**.
3. The installation will begin. Click **Next** to continue. The screen will let you know the progress as the system is updated.

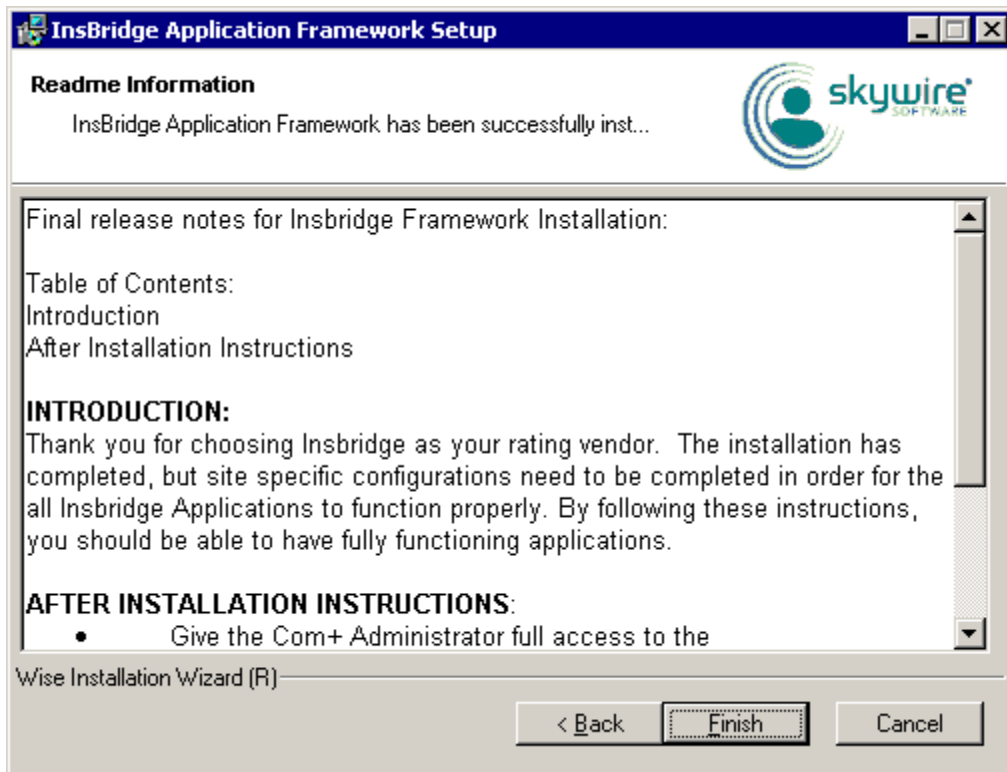


Figure 12 Install ReadMe Screen

4. 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.
5. Click **Finish** to finish the installation. The update should complete successfully.

Configuration of the Insbridge Framework Components

Configure Registry Access for Windows 2000 Server

WARNING

If you use Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Insbridge cannot guarantee that you can solve problems that result from using Registry Editor incorrectly.

By default, only administrative and power user accounts have full permissions over this key. The Insbridge user must also be given **full control** over the following registry key:

HKEY_LOCAL_MACHINE/SOFTWARE/Insbridge

You can perform this by:

1. Select Run from the Start Menu.
2. Type **regedt32**. Click OK. The Registry Editor will open.
3. Browse to HKEY_LOCAL_MACHINE. Select SOFTWARE➤Insbridge.

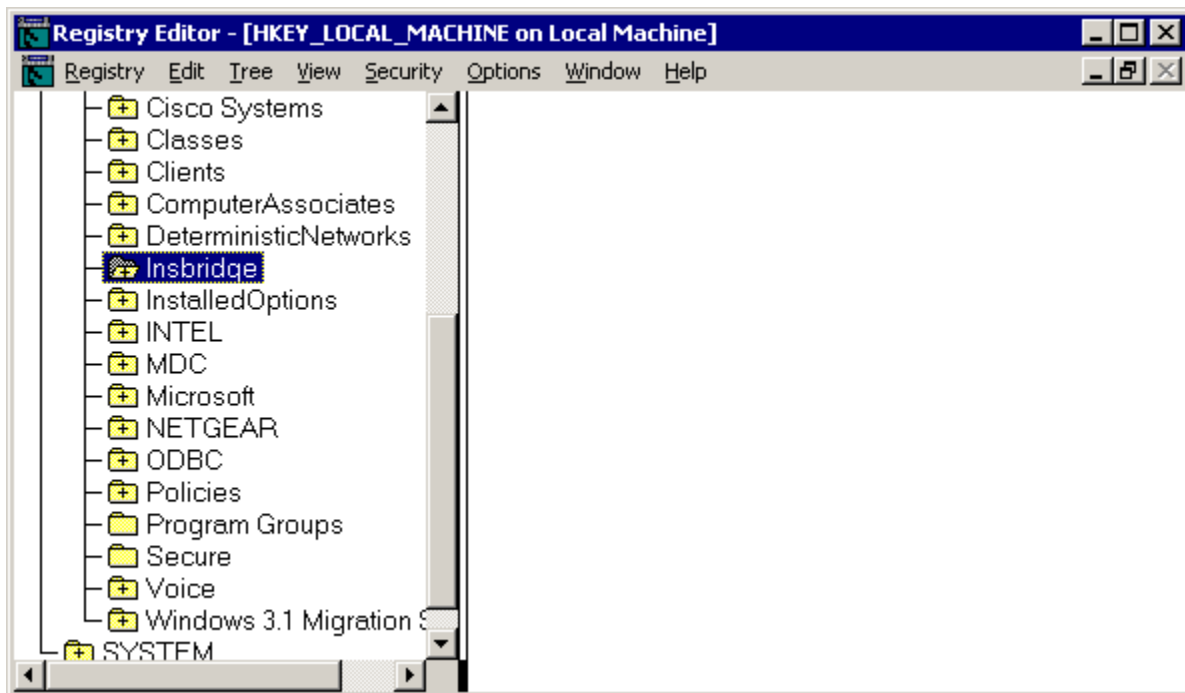


Figure 13 Configure Registry Access Windows 2000 Server

4. Select **Security** from the Registry Editor top bar menu.
5. Select **Permissions**.
6. Click **Add**.
7. On the Select Users or Groups popup, select the directory you need to **Look in**.

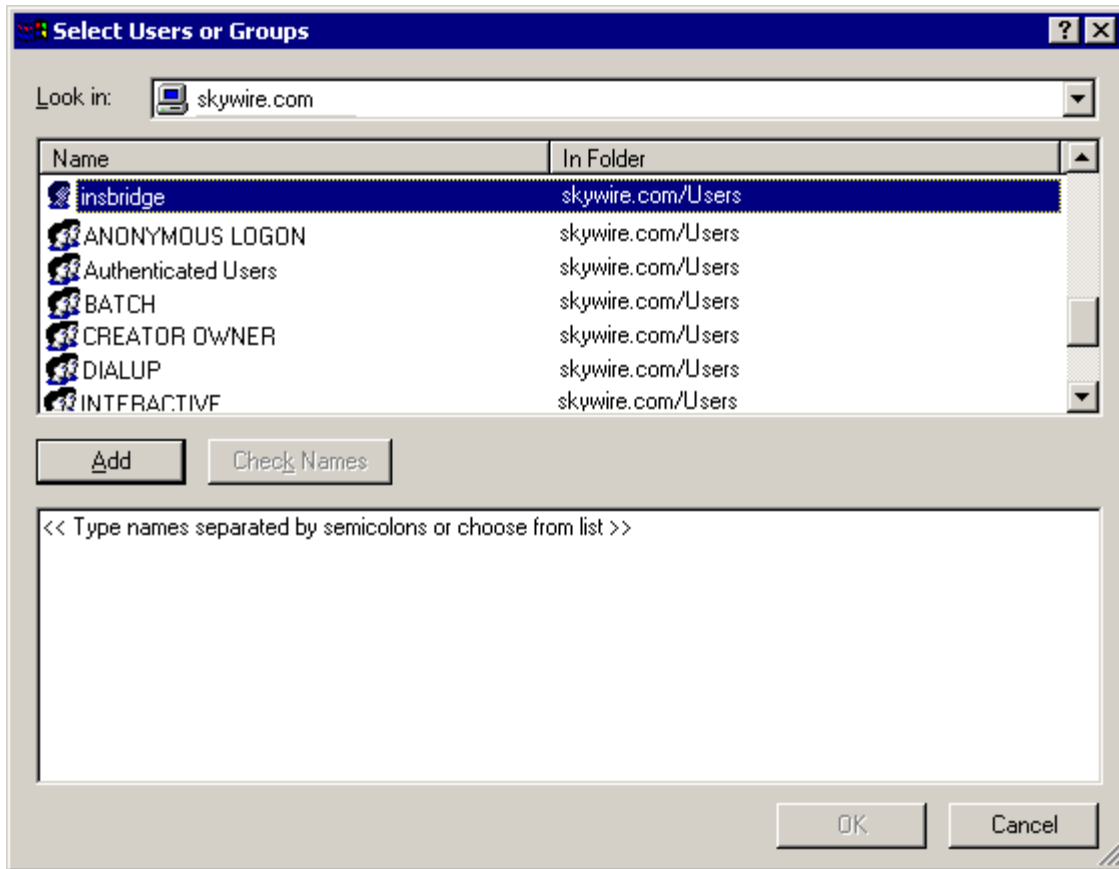


Figure 14 Selecting the insbridge user

8. Scroll until you find the **insbridge** user. Click **Add** and then **OK**.

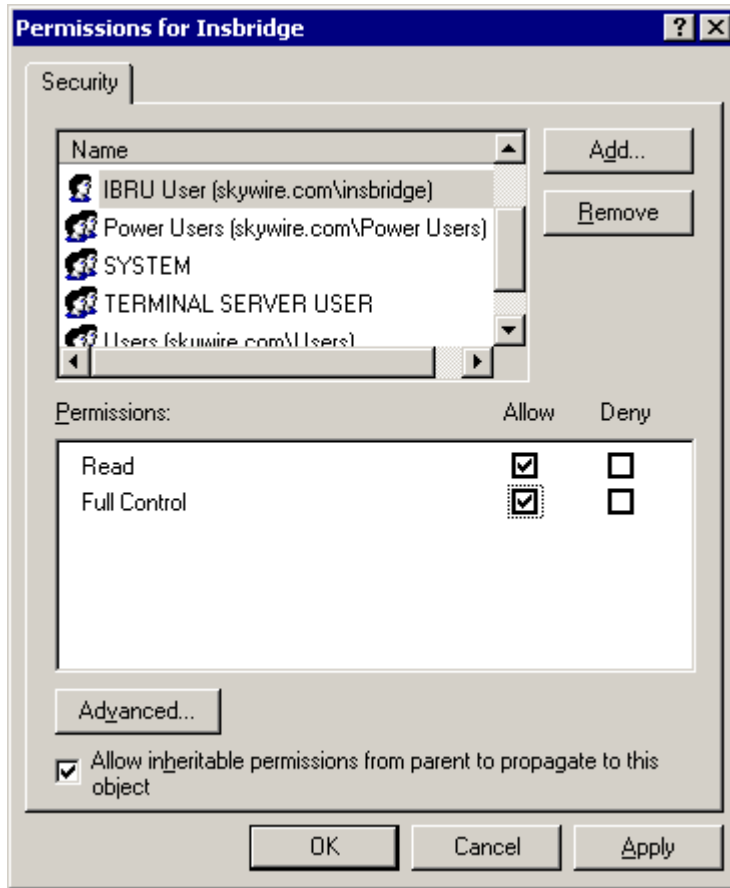


Figure 15 Setting Permissions

9. On the Permissions screen, make sure the insbridge user is highlighted and check to give **Full Control** to the entire Insbridge key.
10. Click **OK**. You can close out the Registry Editor.

Configure Registry Access for Windows Server 2003

WARNING

If you use Registry Editor incorrectly, you may cause serious problems to the operating system. These problems may require you to reinstall your operating system. Insbridge cannot guarantee that you can solve problems that result from using Registry Editor incorrectly.

By default, only administrative and power user accounts have full permissions over this key. The insbridge user must also be given **full control** over the following registry key:

HKEY_LOCAL_MACHINE/SOFTWARE/Insbridge

You can perform this by:

1. Selecting Run from the Start Menu.
2. Type **regedt32**. Click **OK**. The Registry Editor will open.
3. Browse to HKEY_LOCAL_MACHINE. Select SOFTWARE>Insbridge.

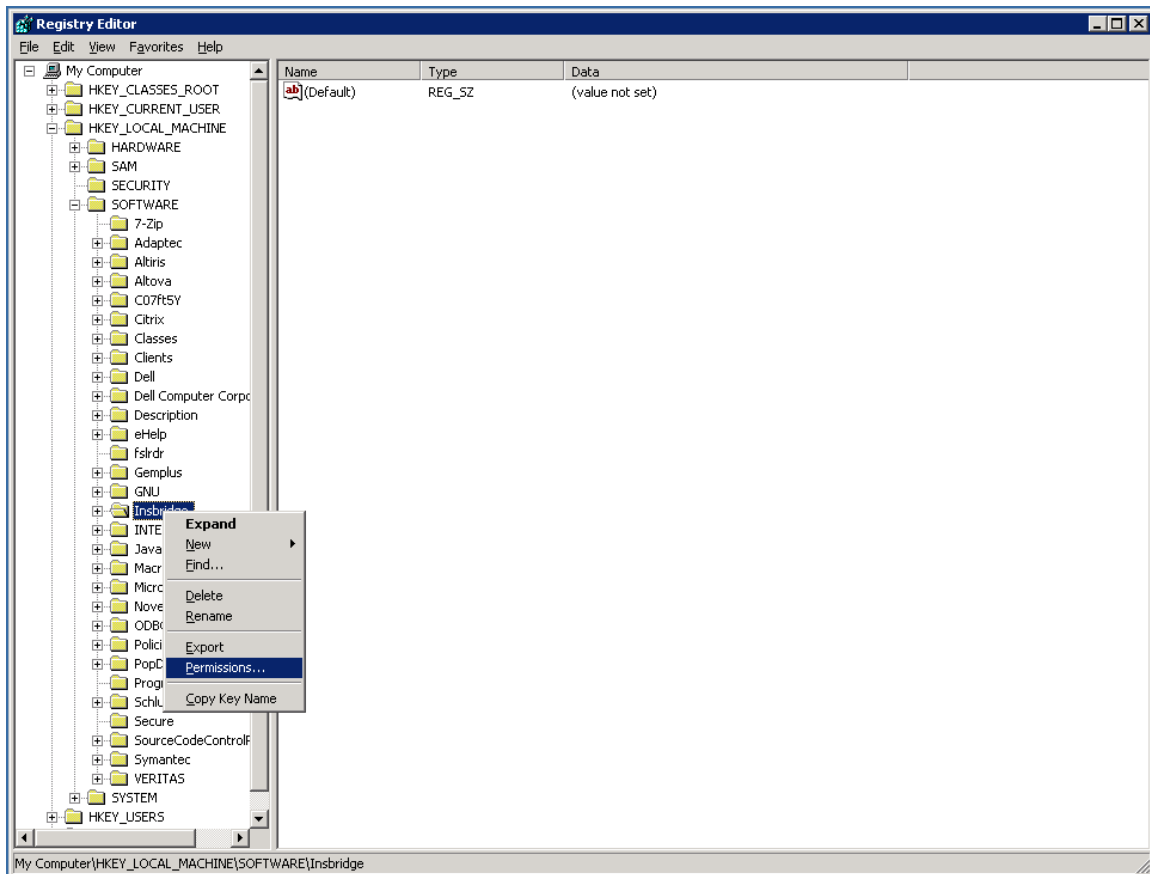


Figure 16 Configure Registry Access Windows Server 2003

4. Right click and select **Permissions**.
5. Click **Add**.
6. On the Select Users or Groups popup, select the **Object Types** and **Locations**.

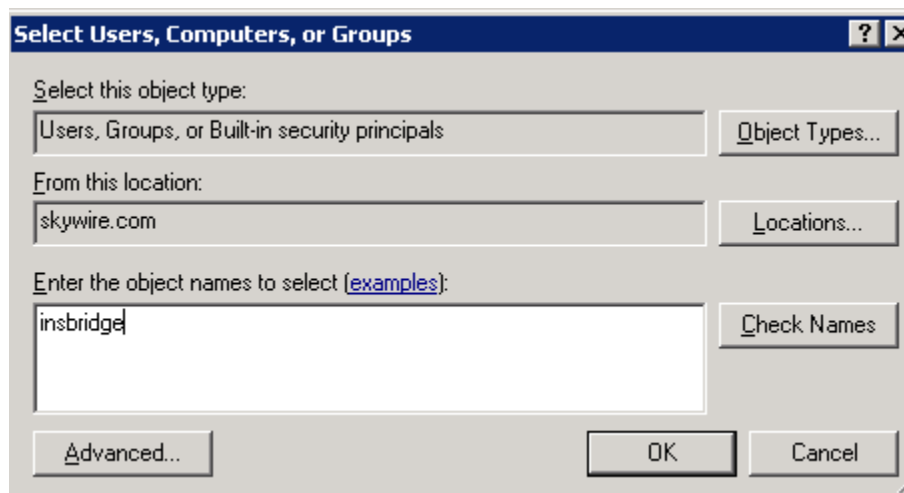


Figure 17 Entering the User

7. Enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, an error screen will be displayed. Cancel out and return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
8. Once the name is listed, click **OK**.

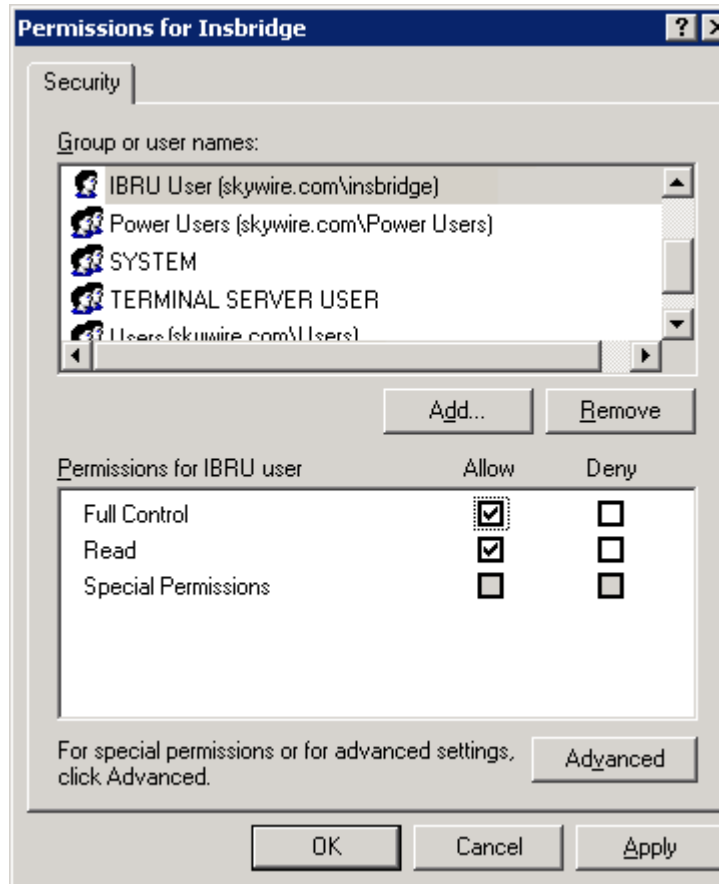


Figure 18 Applying Permissions for 2003 User

9. On the Permissions screen, make sure the insbridge user is highlighted and check to give **Full Control** to the entire Insbridge key.
10. Click **OK**. You can close out the Registry Editor.

Windows Temp Folder for MSMQ

Microsoft .NET requires that the user sending messages using Microsoft Message Queue (MSMQ) have full access to the WINNT\Temp folder (on 2000) or the WINDOWS\Temp folder (on 2003). The insbridge user created on page 19 should be given full permissions.

The basic pathway is the same for both 2000 and 2003. The screens involved are similar to the ones pictured in Configuring Registry Access.

For 2000, this can be performed by going to your system setup drive (most likely the C drive):

1. Open Windows Explorer. Find the WINNT folder, most likely on your C drive.

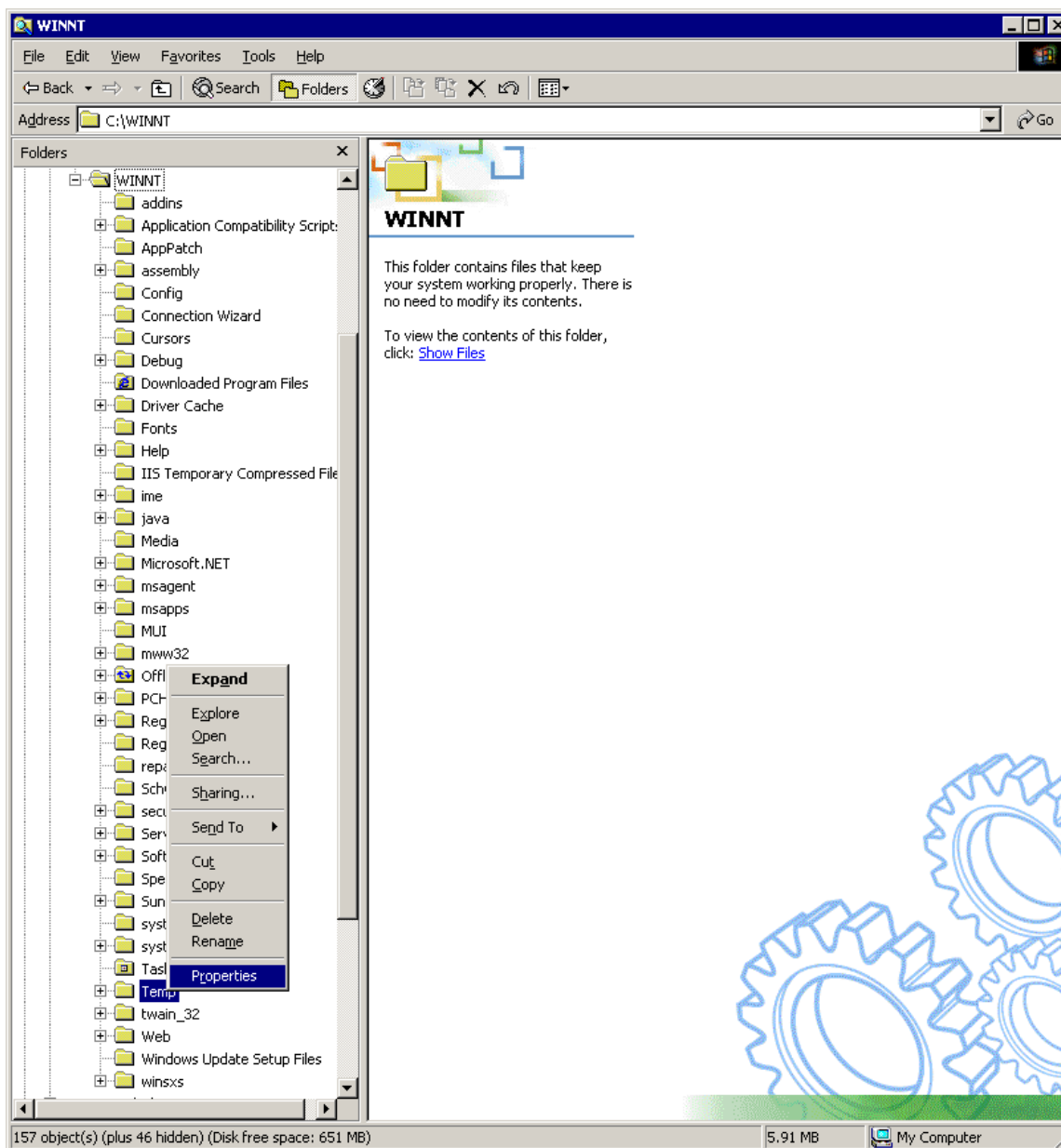


Figure 19 Windows Explorer WINNT 2000 Properties

2. Right click the **WINNT\Temp** folder.
3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users, Computers or Groups popup, select the directory you need to **Look in**.
7. Scroll until you find the insbridge user. Click **Add** and then **OK**.
8. On the Temp Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.
9. Click **OK**.

For Windows 2003, the procedure is similar.

1. Open Windows Explorer. Find the WINDOWS folder, most likely on your C drive.
2. Right click the **Windows>Temp** folder.

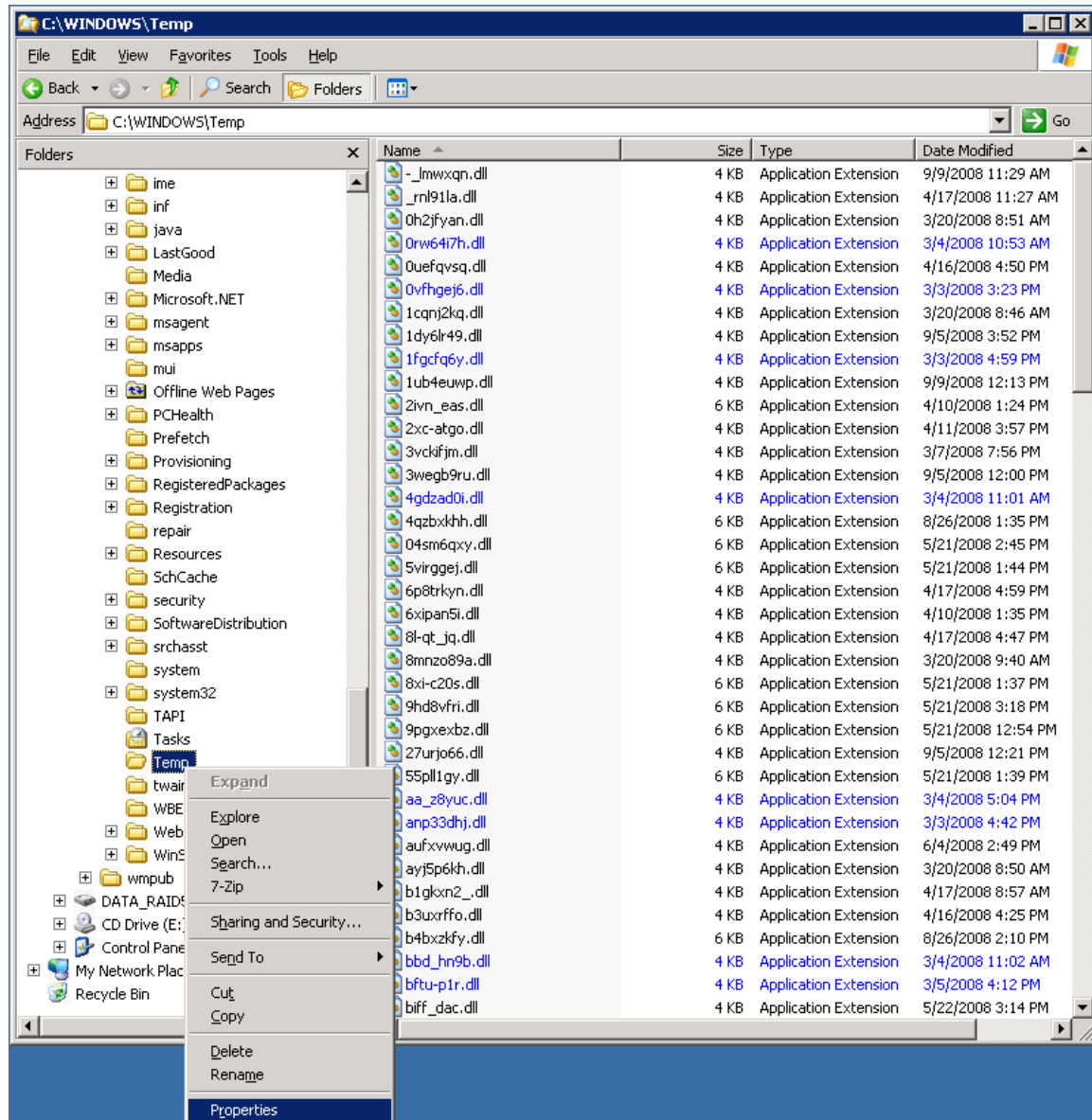


Figure 20 Windows Explorer WINNT 2000 Properties

3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users or Groups popup, select the **Object Types** and **Locations**.
7. Enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, and error screen will be displayed. Cancel out and to return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need.

- If the user name is not listed, return to User Accounts and verify the user name was created.
8. Once the name is listed, click **OK**.
 9. On the Temp Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.
 10. Click **OK**.

Permissions for Insbridge Folder Location

Full access also must be given to the Insbridge user created on page 19 to the installation location for the Insbridge folder. This is the location you selected to install the IBFA, most likely C:\Program Files\Insbridge.

By default administrators are given full permissions to the local server file system. If the Insbridge user was not given Administrative permissions then they must be given full control over the Insbridge folder.

For 2000:

1. Open Windows Explorer. Find the Programs folder. Select the Insbridge folder.

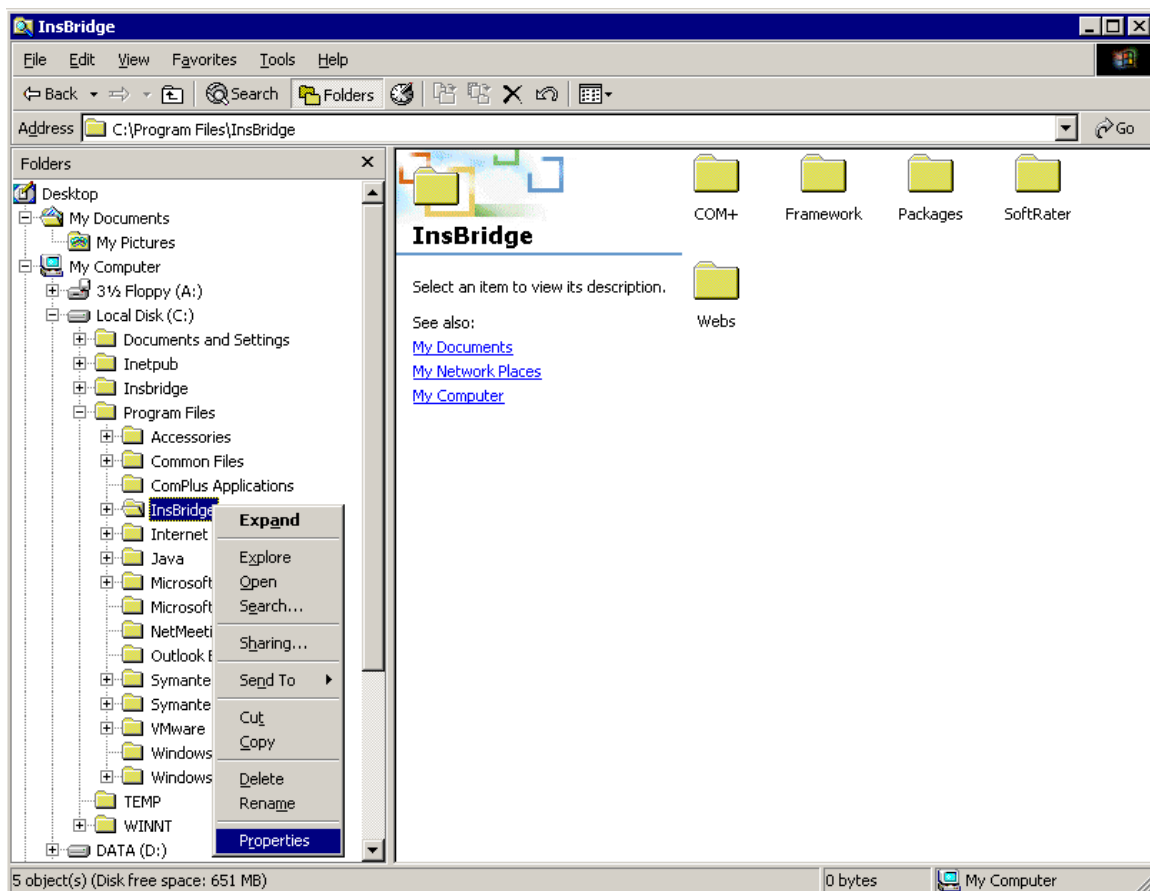


Figure 21 Insbridge Folder Properties

2. Right click the **Insbridge** folder.

3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users, Computers or Groups popup, select the directory you need to **Look in**.
7. Scroll until you find the insbridge user. Click **Add** and then **OK**.
8. On the Insbridge Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.

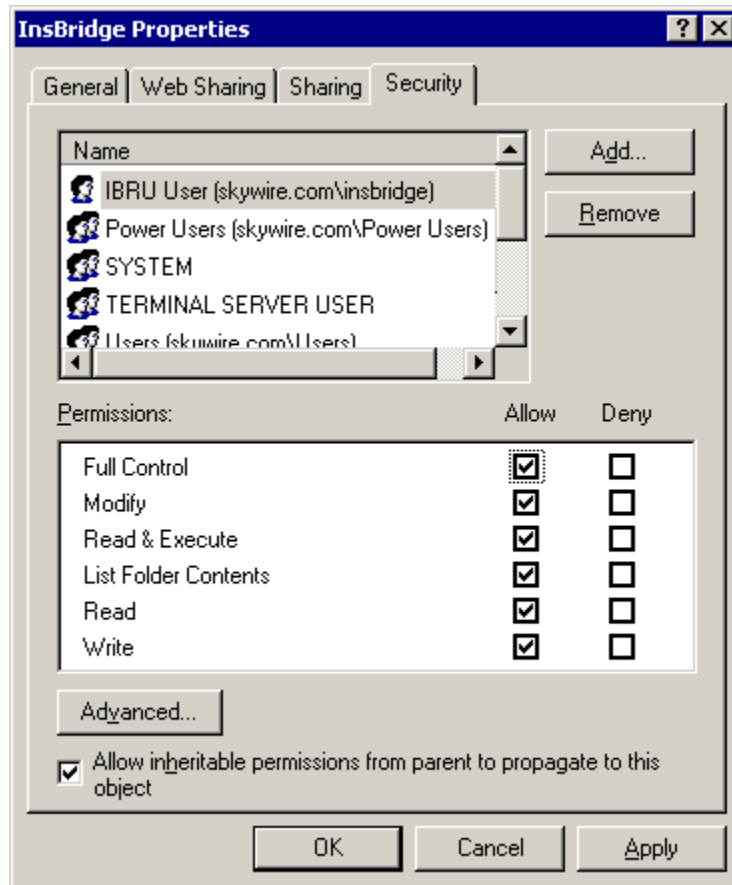


Figure 22 Setting Permission for Insbridge Folder

9. Click **OK**. You can close out Windows Explorer.

For 2003 the procedure is similar:

1. Open Windows Explorer. Find the Programs folder. Select the Insbridge folder.
2. Right click the **Insbridge** folder.
3. Select **Properties**.
4. Change to the **Security** tab.
5. Click **Add**.
6. On the Select Users or Groups popup, select the **Object Types** and **Locations**.
7. Enter in the user name (insbridge) and click **Check Names**. If the user name is found, it will be listed. If the name is not found, and error screen will be displayed. Cancel out and

- to return to the Select Users or Groups popup. Click **Advanced** to search. To search the directory, click Find Now and scroll through the list until you find the user name you need. If the user name is not listed, return to User Accounts and verify the user name was created.
8. Once the name is listed, click **OK**.
 9. On the Insbridge Properties screen, make sure the insbridge user is highlighted and check to give **Full Control**.

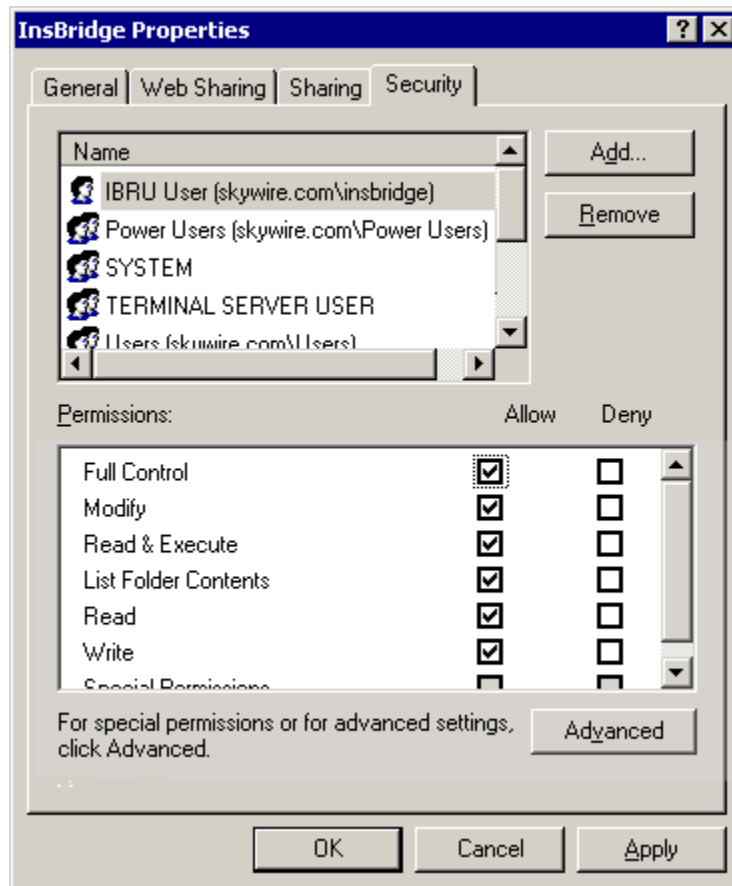


Figure 23 Setting Permission for Insbridge Folder

10. Click **OK**. You can close out Windows Explorer.

Insbridge RateManager Installation

If you are performing just a SoftRater node installation (i.e.: on a production SoftRater server), the following does not need to be performed.

Once the Insbridge Framework is installed, the RateManager system installation now can be performed. RateManager.msi is located in the Install folder on the zip file you received. There are no configurations to set for the RateManager installation since it gathers all required information from the Insbridge Framework install.

The RateManager zip file will contain DB folder, IE7 Users, an Install folder and a Patch folder.

Open the Installs folder first.

NOTE

The RateManager Application will not install on a system without the Insbridge Framework being installed first.

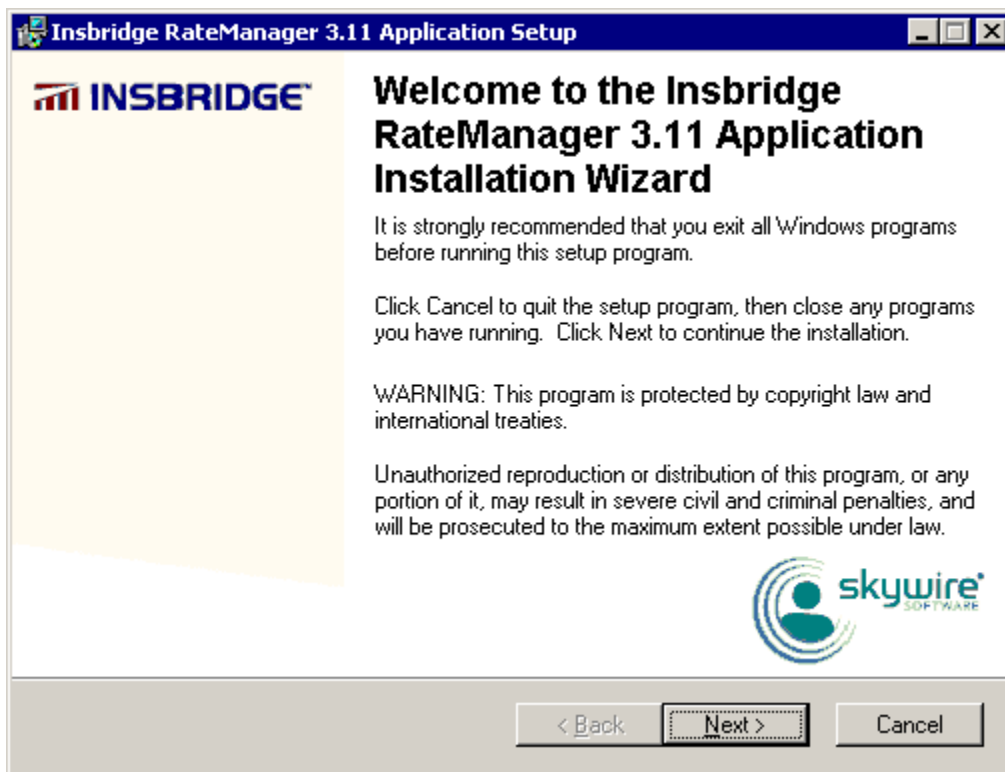


Figure 24 Installing RateManager

Click **Next** to continue.

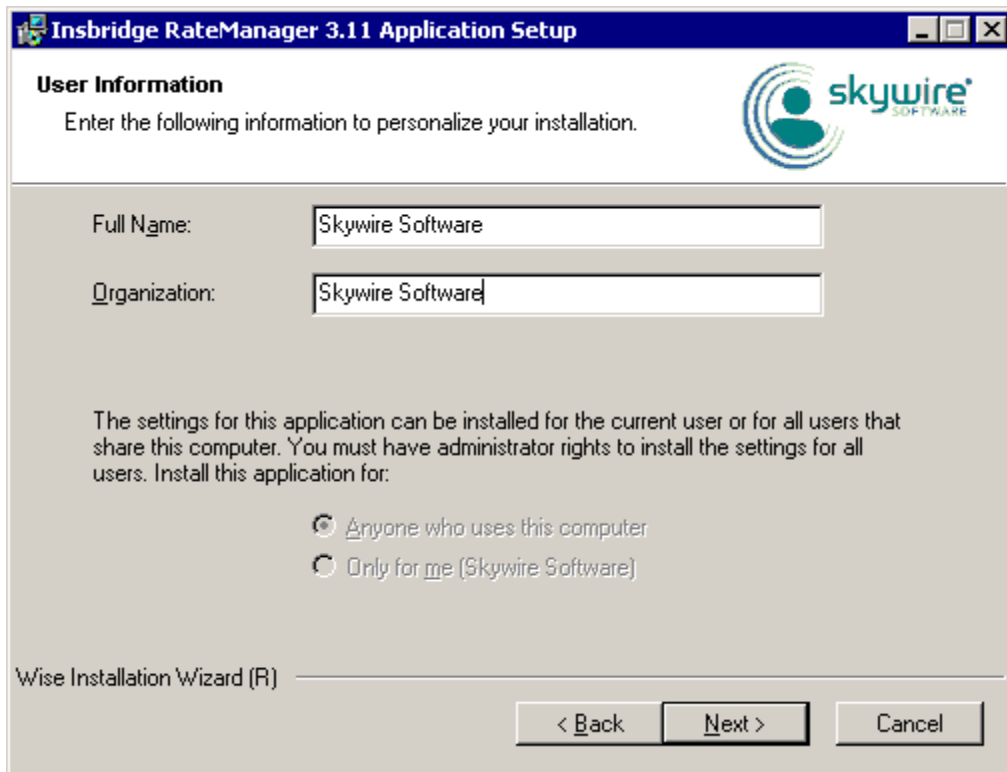


Figure 25 Entering User Information

Click **Next** to continue.

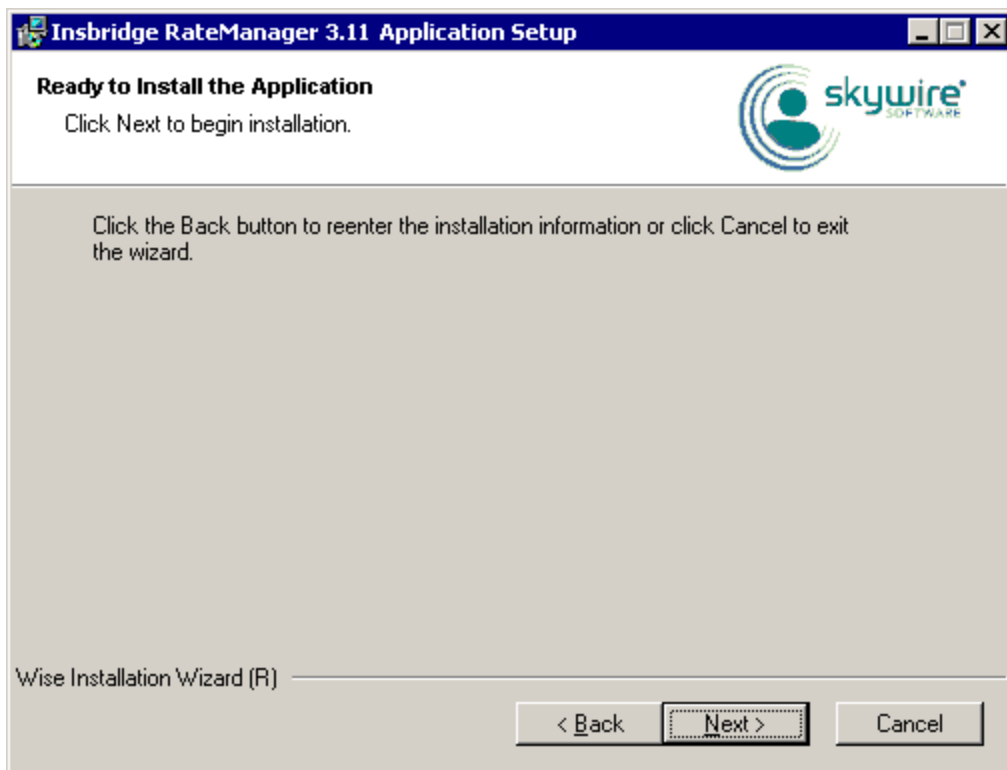


Figure 26 Installing RateManager

The installation will begin. Click **Next** to continue. The screen will let you know the progress as the system is updated.

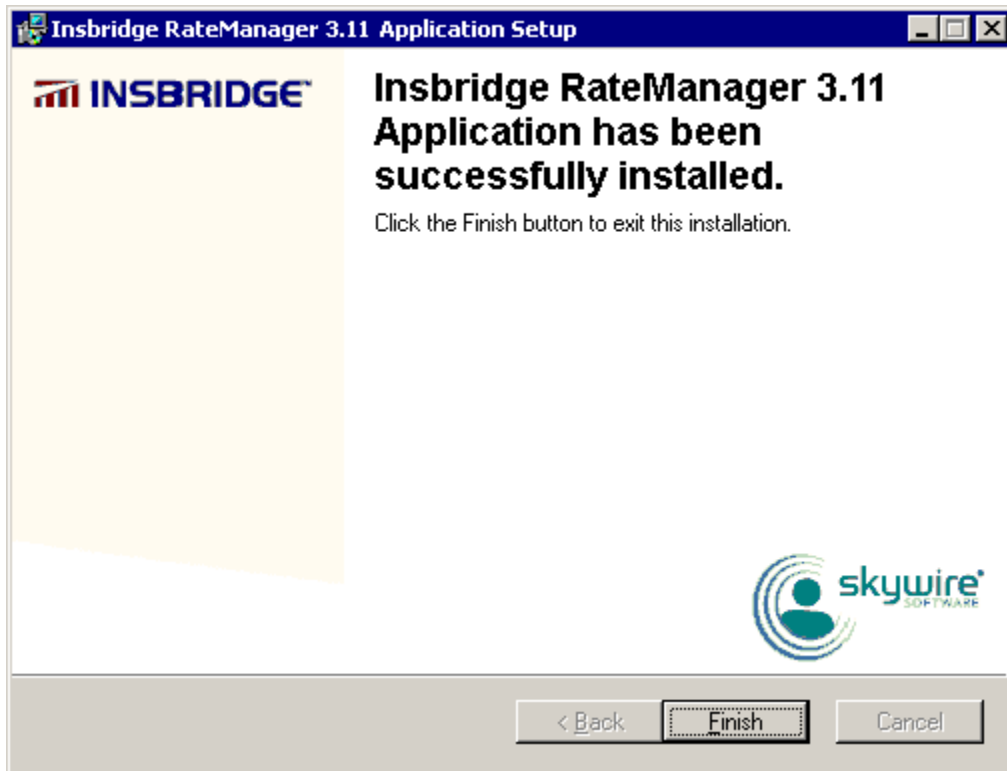


Figure 27 Completed RateManager Installation

When the installation is complete, click **Finish**. The wizard will close.

IBRU Database Creation and Installation

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.

Before attaching the databases:

1. **Create a SQL Server account** called ibru with a password that meets your company standards.
2. **Framework Administrator templates.** The database template file IBSR_TEMPLATE.mdf is used to update the SoftRater database. This file must be run in SQL Server when the installation is complete. This file is not version specific and is the only update file for SoftRater, even if you are going from a version lower than 3.10.
3. **RateManager templates.** The database template files IB_CLIENT_TEMPLATE.mdf and IBRM_TEMPLATE.mdf are used to update the RateManager database. These files are version specific and must be run sequentially when the installation is complete. The database update scripts in the RateManager folder will take you from a 3.10 version to a 3.11 version only.

NOTE

If you need to go from a lesser version, such as 3.9, you will have to enter RateManager and run the IBRM and IB_CLIENT update scripts in sequential order from there. You must be a DB Owner to run the update scripts in RateManager.

Be sure to run the scripts in sequential order.

See Converting from RateManager 3.x to RateManager 3.11 and IBRU Database Updates for more information.

Databases and User Required for Each Installation Type

The table below shows which databases and database users are required for each type of installation.

| | Installation Type | |
|-----------|-------------------|-----------|
| | RateManager | SoftRater |
| Database | | |
| IB_CLIENT | Yes | Yes |
| IBRM_xxxx | Yes | No |
| IBSR | No | Yes |

If performing just a SoftRater node installation, you do not have to retrieve IBRM_TEMPLATE.mdf.

For SQL Server 2000

Because many corporate environments have a separation between the system administrator and the database administrator, the following process may require both administrators' access and permissions. Make sure you have a SQL Server account called **ibru**.

NOTE

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

If you are unsure how to perform a database restore, please consult with your database administrator.

1. **Copy files.** The **IBRM_TEMPLATE** and **IB_CLIENT_TEMPLATE** database files are located in the RateManager installation download in the DBs>Databases folder. The **IBSR_TEMPLATE** file is located in the Framework download in the DBs>Databases folder. Copy all three files to an appropriate database folder on the machine where SQL Server is installed. For example, [Drive]:\Program Files\Insbridge\Databases. If you are unsure of a location, please contact your database administrator.

NOTE

If performing just a SoftRater 3.11 installation then the only databases needed are the **IB_CLIENT_TEMPLATE** and **IBSR_TEMPLATE**.

2. **Rename files.** It is not required but it is strongly suggested that the database file names be changed from **TEMPLATE** to something that defines the databases more accurately. At a minimum, it is recommended that you remove “_TEMPLATE” from the name. You can change the names after they have been attached also.
3. **Open the SQL Server Enterprise Manager** either on the server or remotely using either an administrative account with sa privileges or as the sa account.
4. **Browse** under the DBServer to the Databases.

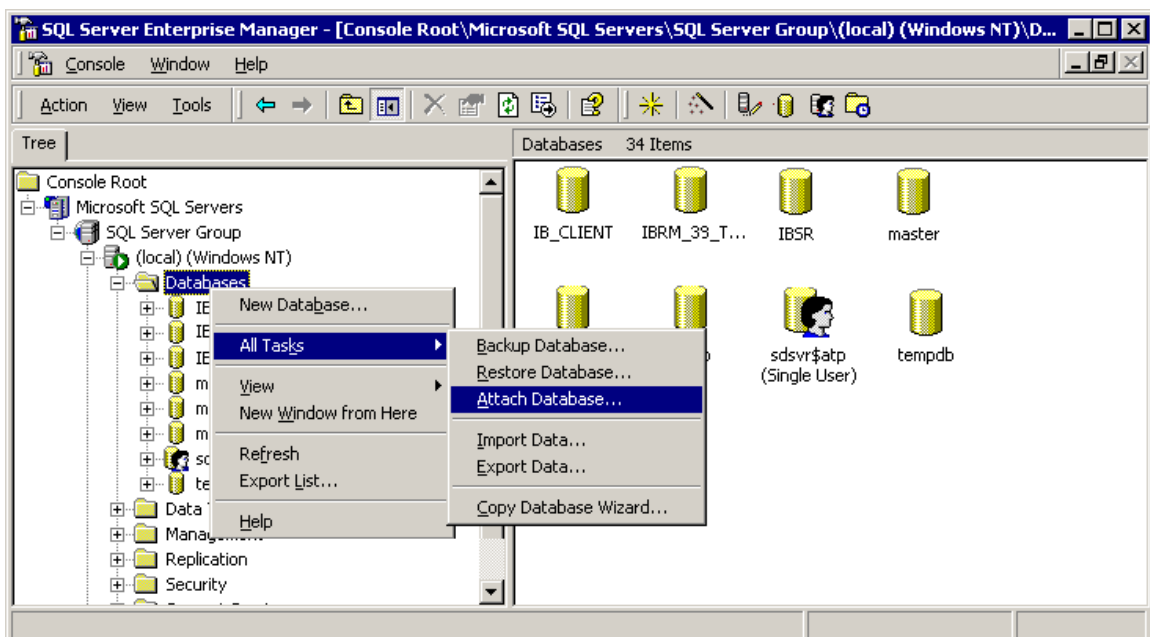


Figure 28 Setting up a SQL Server 2000 Database

5. Right click on **Databases**.
6. Select **All Tasks**.
7. Select **Attach Database...** A separate screen will be displayed.

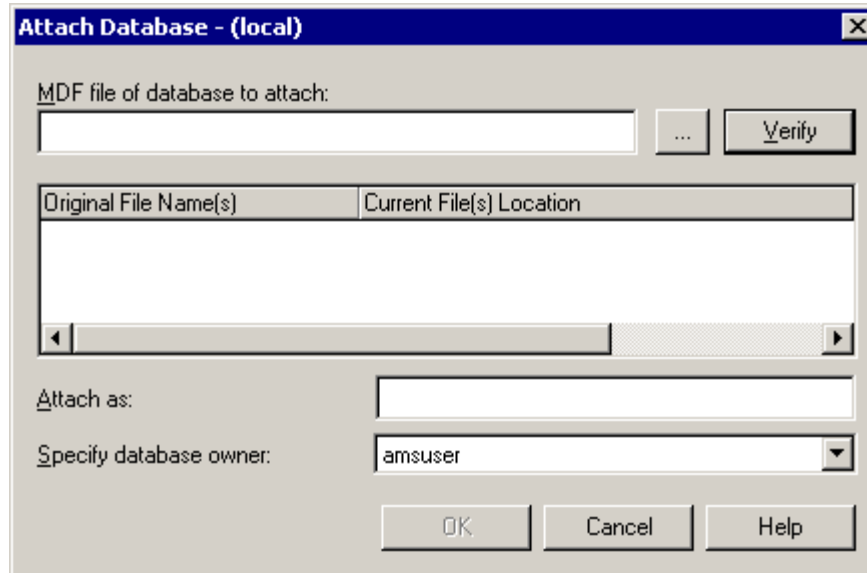



Figure 29 Attaching a Database

8. Click the search button  and browse to the location where the database files reside.
9. Attach database **IB_CLIENT_xxxx.MDF**, where **xxxx** equals the renamed file from step 2.

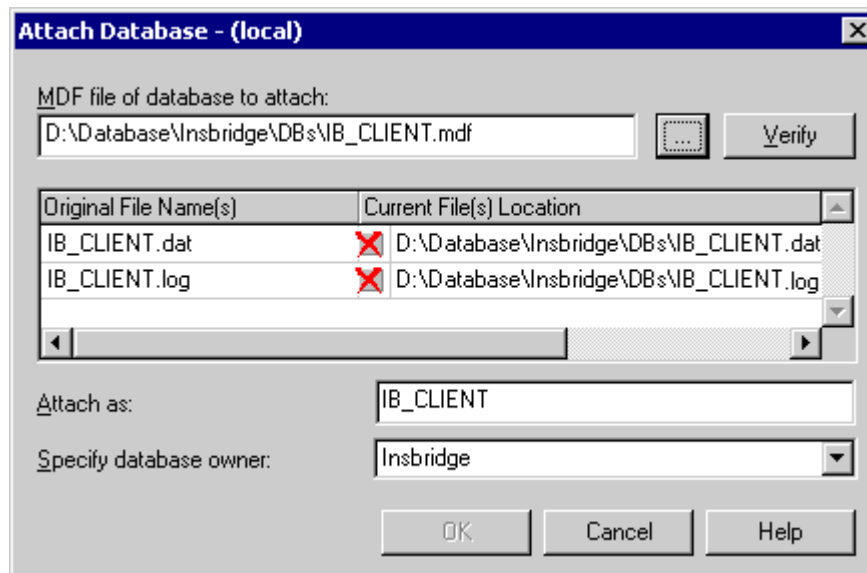


Figure 30 IB_CLIENT_xxxx Attached

10. **Delete the log file.** The log file must be deleted to prevent an error. For SQL Server 2000, erase the Current File Location for the log file.
11. If necessary, **rename the IB_CLIENT_ xxxx.dat** file to **IB_CLIENT_ xxxx.mdf**.
12. Change the **Attach as:** file name to the file name you assigned in step 2.

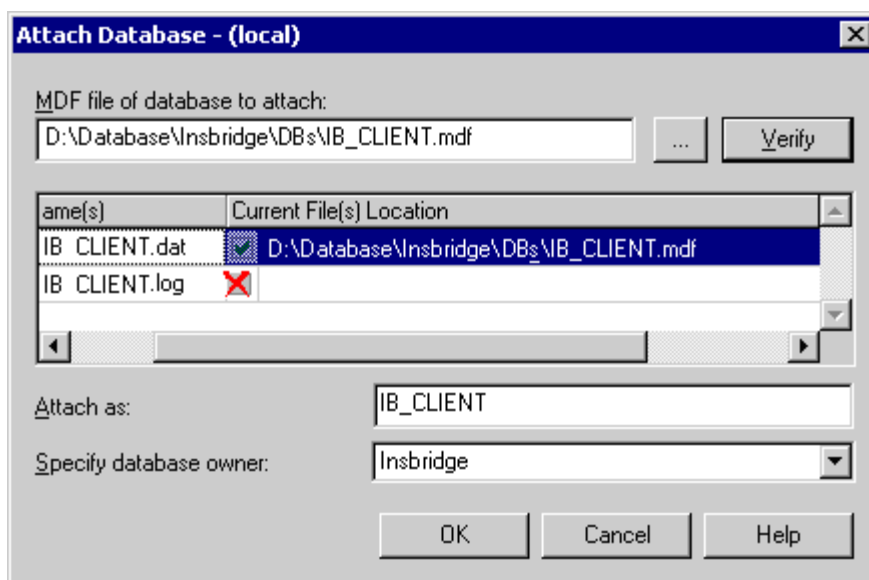
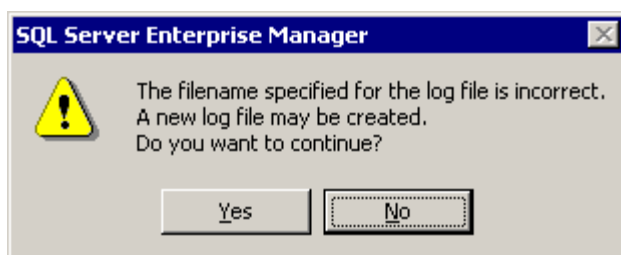
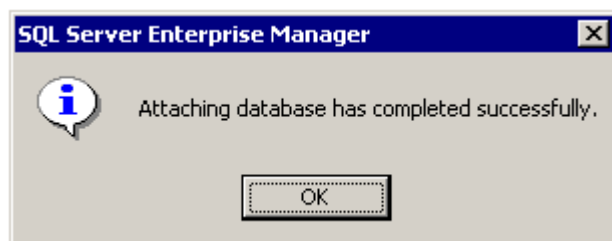


Figure 31 Editing the Database before Attaching

13. After you have made your edits, click **OK**.
14. The system will create a new log file for this data base, click **Yes**.



15. If the database was attached successfully, a success message will be displayed. If not, please correct any errors and try again.



Do the same for the IBRM_ xxxx and IBSR databases depending on your installation type.

Once the databases are attached to SQL Server, you will need to create or assign a SQL Server user account for the application. This user will be used for the connection to the databases when setting up the connections from the Insbridge Framework Administrator.

If backups are to be allowed from the RateManager application (see page 38 for more details), then the ibru SQL server user account must have the **Disk Administrators SQL Server role**.

For ease of administration, the database user should have **db_owner** permissions on the IBRM_XXXX , IB_CLIENT, and IBSR database. See page 71 for further details on tightening user permissions.

For SQL Server 2005

Because many corporate environments have a separation between the system administrator and the database administrator, the following process may require both administrators' access and permissions. Make sure you have a SQL Server account called **ibru**.

NOTE

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

If you are unsure how to perform a database restore, please consult with your database administrator.

1. **Copy files.** The **IBRM_TEMPLATE** and **IB_CLIENT_TEMPLATE** database files are located in the RateManager installation download in the DBs>Databases folder. The **IBSR_TEMPLATE** file is located in the Framework download in the DBs>Databases folder. Copy all three files to an appropriate database folder on the machine where SQL Server is installed. For example, [Drive]:\Program Files\Insbridge\Databases. If you are unsure of a location, please contact your database administrator.

NOTE

If performing just a SoftRater 3.11 installation then the only databases needed are the IB_CLIENT_TEMPLATE and IBSR_TEMPLATE.

2. **Rename files.** It is not required but it is strongly suggested that the database file names be changed from TEMPLATE to something that defines the databases more accurately. At a minimum, it is recommended that you remove “_TEMPLATE” from the name. You can change the names after they have been attached also.
3. **Open the SQL Server Management Studio** either on the server or remotely using either an administrative account with sa privileges or as the sa account.

NOTE

If you do not have SQL Server Management Studio, check to see that the SQL Server Client has been installed. For a SQL Server 2005 install, you must have the SQL Server Client installed.

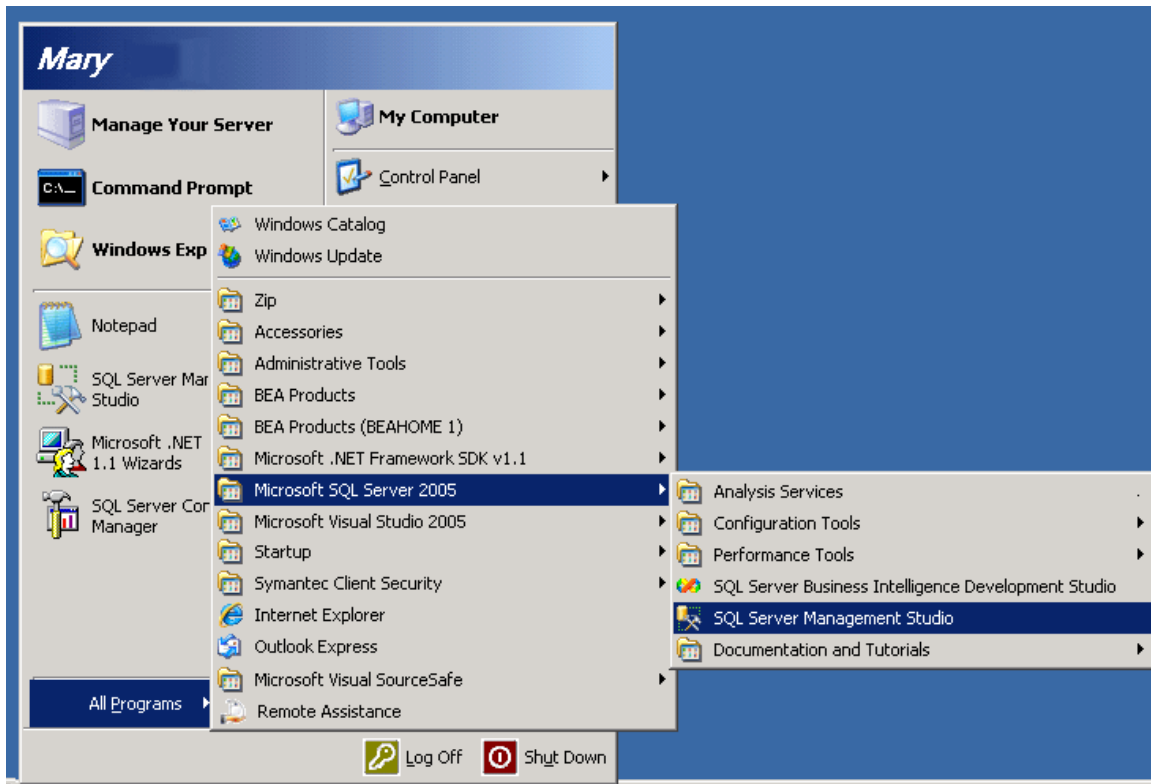


Figure 32 Attaching a Database to SQL Server 2005

4. Go to **Databases**.

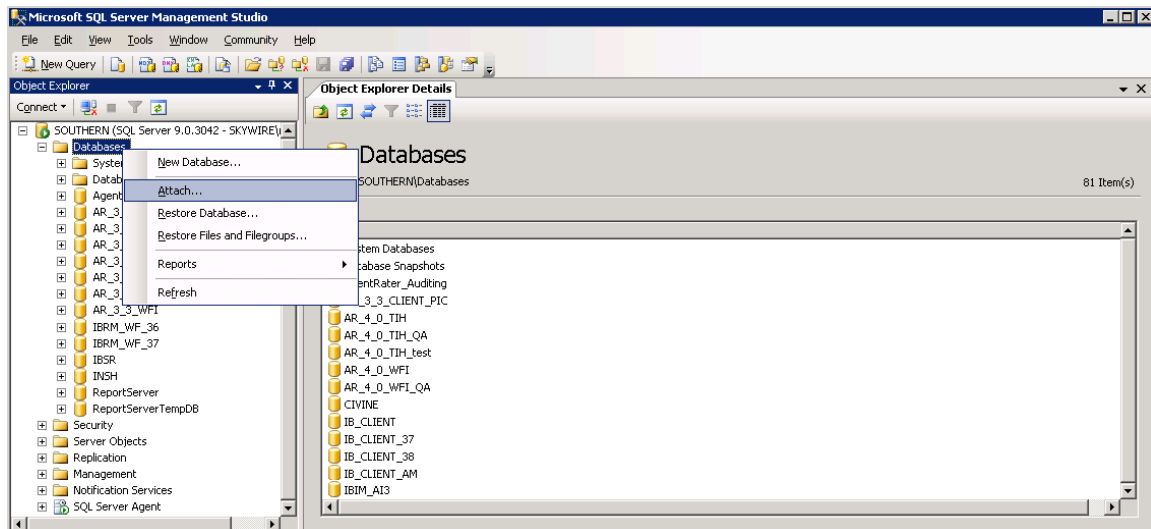


Figure 33 Right Click to Attach Database

5. Right click on **Databases**.

6. Select **Attach...** A separate screen will be displayed.

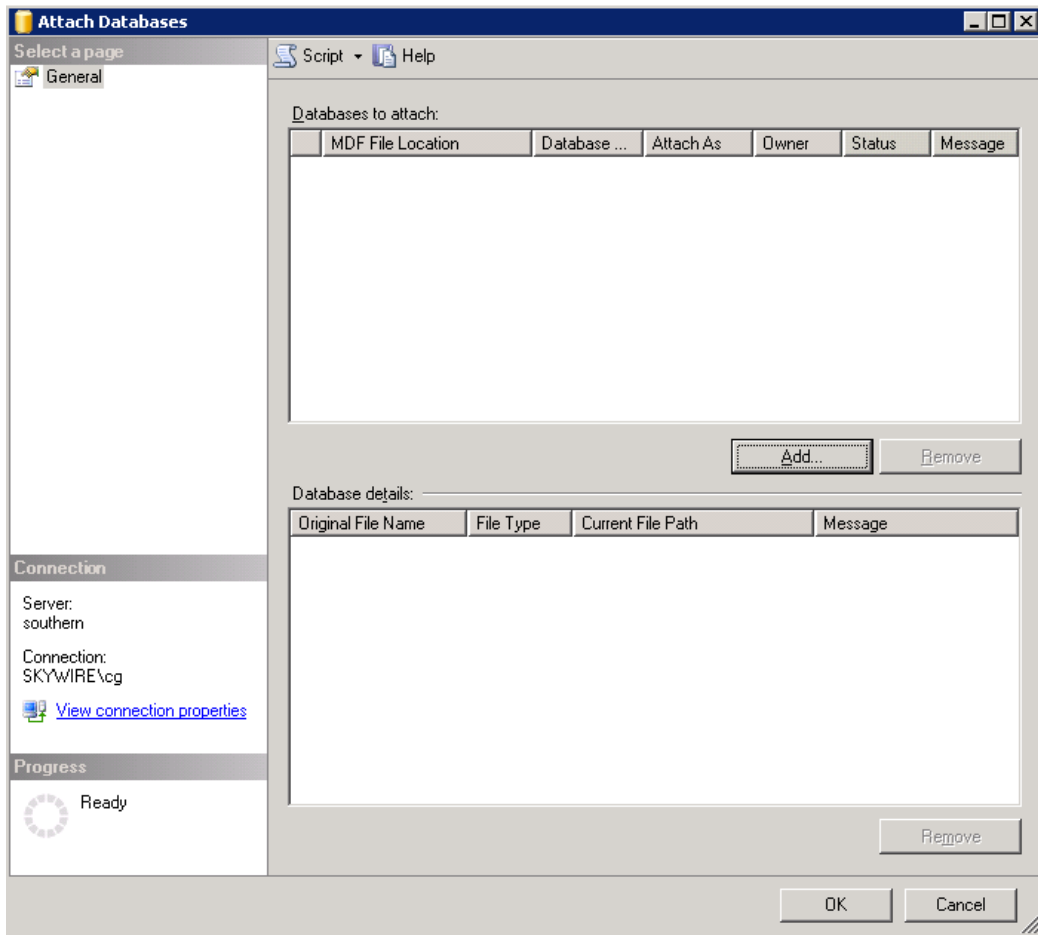


Figure 34 Attaching a Database

7. Click the **Add** button and browse to the location where the database files were placed in step 1.
8. Attach database **IB_CLIENT_ xxxx.MDF**, where **xxxx** equals the renamed file from step 2.

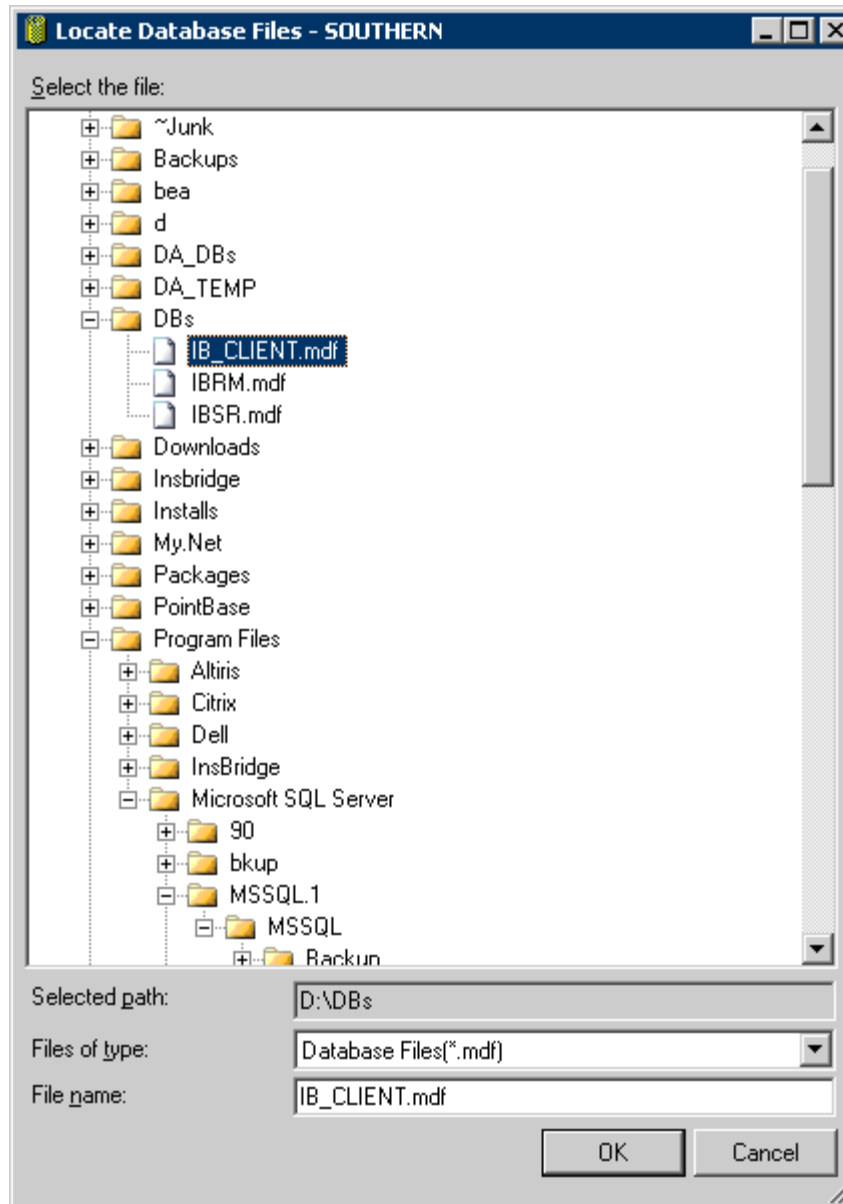


Figure 35 IB_CLIENT_xxxx Attached

9. Click **OK**.

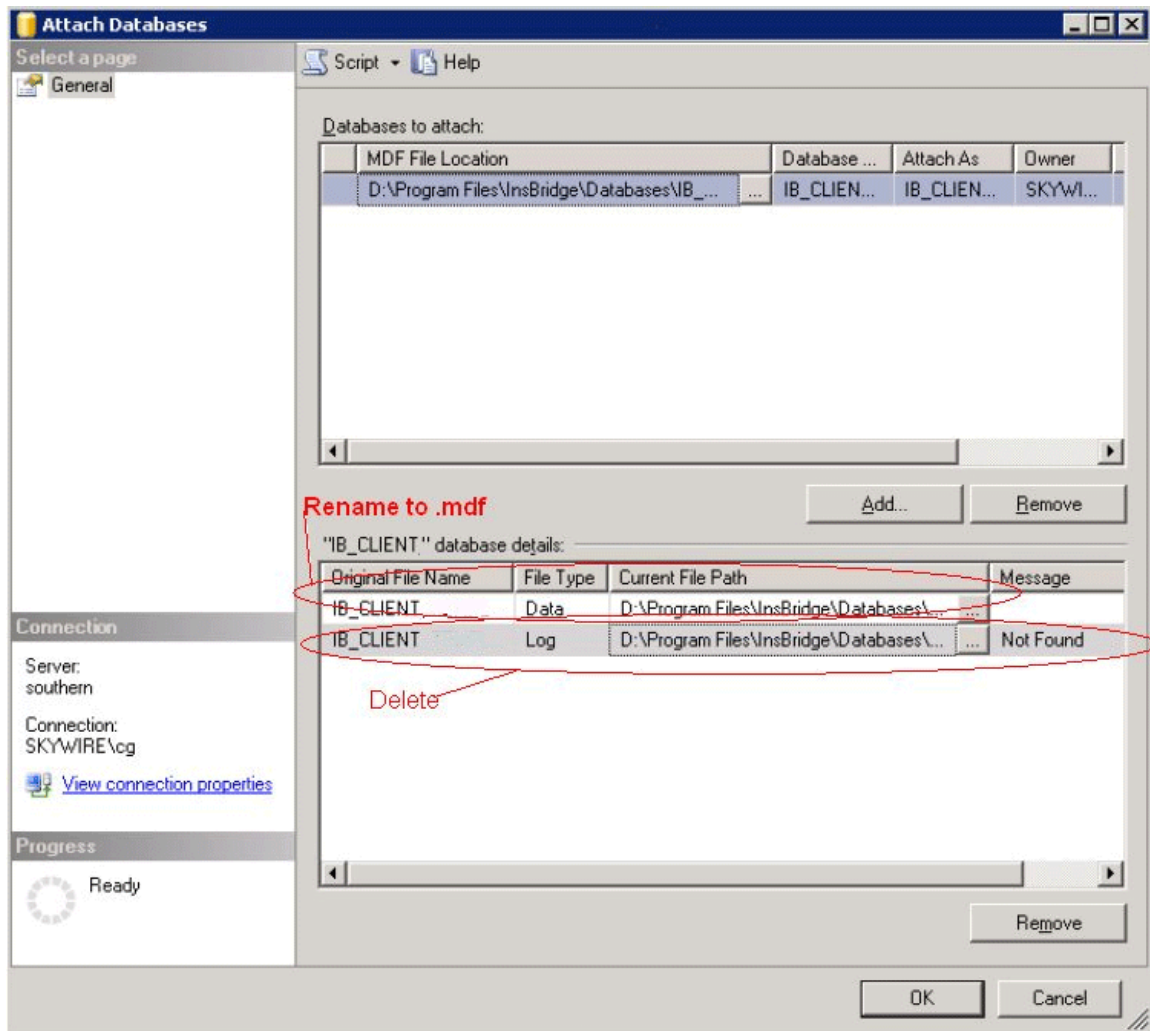


Figure 36 Editing the Database before Attaching

10. **Delete the log file.** The log file must be deleted to prevent an error. For SQL Server 2005, highlight the log file in the Current File Path area and click the **Remove** button.
11. Make sure the original file name has an **.mdf** extension and not a **.dat** extension. If the file is **IB_CLIENT_ xxxx.mdf** and not **IB_CLIENT_ xxxx.dat**, the file has the wrong extension and you will have to rename it.
12. Make sure the current file path of **IB_CLIENT_ xxxx.mdf**, where **xxxx** equals the renamed file from step 2, is pointing to the correct location. If it is not, you will have to change it.
13. Change the **Attach as:** file name to the file name you assigned in step 2.
14. After you have made your edits, click **OK**.
15. If the database was attached successfully, it will be displayed in the database folder. If not, please correct any errors and try again.

Do the same for the IBRM_xxxx and IBSR databases depending on your installation type.

Once the databases are attached to the SQL Server, you will need to create or assign a SQL Server user account for the application. This user will be used for the connection to the databases when setting up the connections from the Insbridge Framework Administrator.

If backups are to be allowed from the RateManager application (see page 38 for more details), then the ibru SQL server user account must have the **Disk Administrators SQL Server role**.

For ease of administration, the database user should have **db_owner** permissions on the IBRM_xxxx , IB_CLIENT, and IBSR database. See page 71 for further details on tightening user permissions.

Final Configuration Using Insbridge Framework Administrator

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

<http://SERVERNAME/ibfa/>

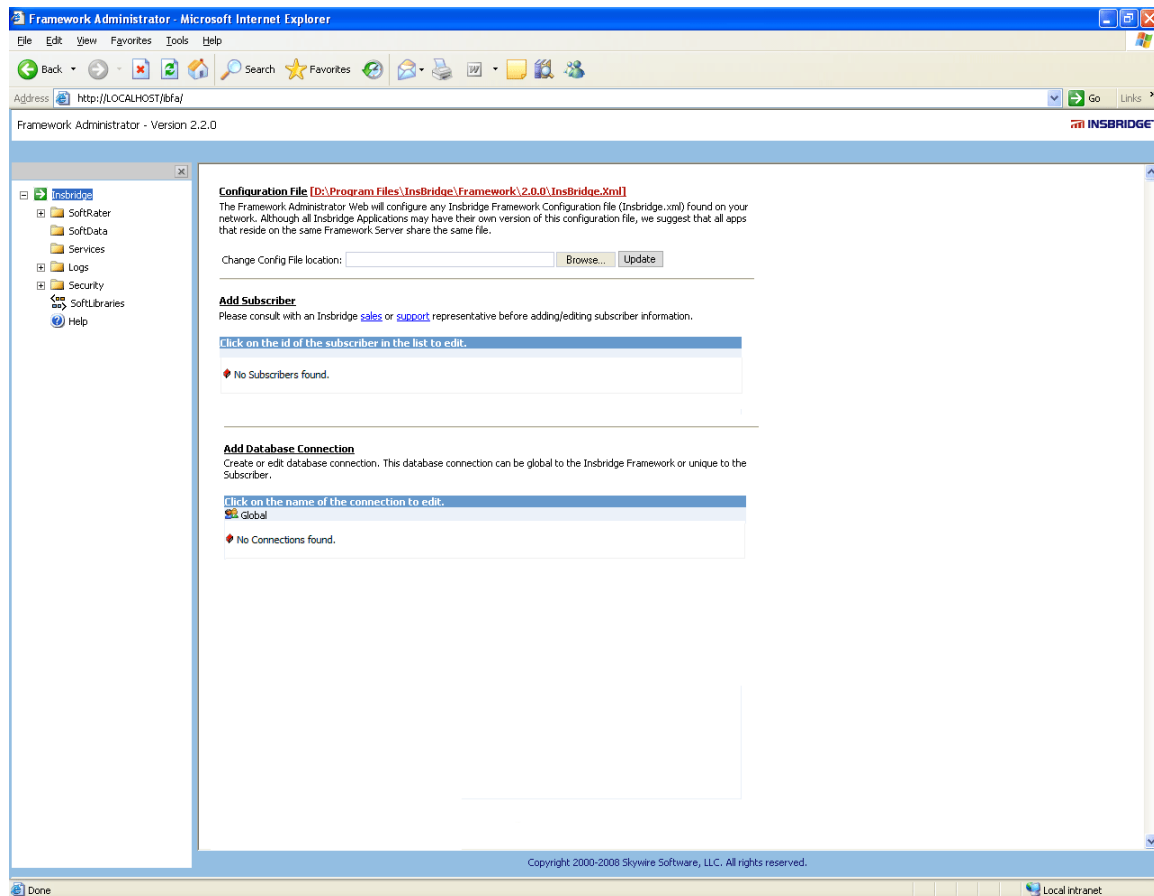


Figure 37 IBFA Home

NOTE

Please refer to the IBFA guide for managing and editing IBFA components.

Click on **Add Subscriber** and in the next dialog, **type in your ID and name as provided by Oracle Insurance**.

The ID and Name listed below is only an example and not your real ID and subscriber name. If this information was not provided with the installation, please contact support-skywire_ww@oracle.com before continuing.

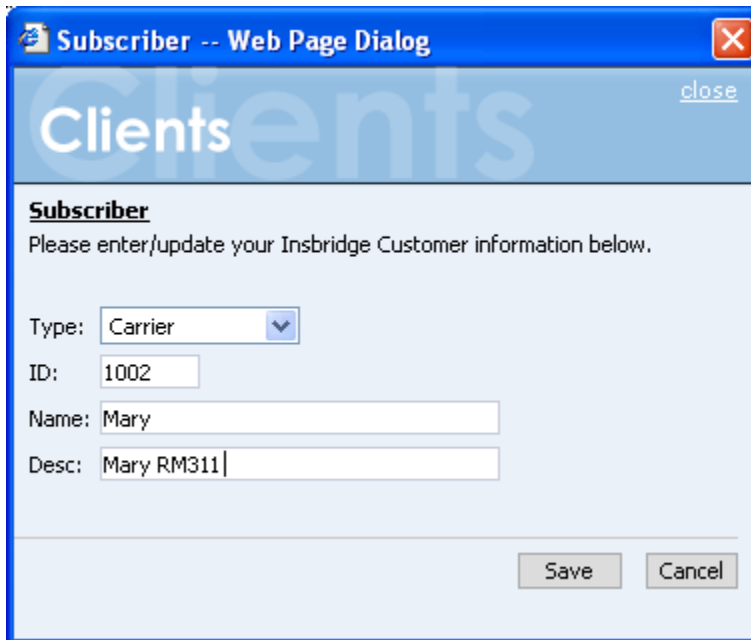


Figure 38 Enter ID

Next select the **Add Database Connection** link. The three databases must be added to IBFA:

- Subscriber: **Global** with Name: **controller**
- Subscriber: **(Your Subscriber Name)** with Name: **security**
- Subscriber: **(Your Subscriber Name)** with Name: **RM**

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

In the next popup dialog, fill out connection information for the IB_CLIENT database using the Global subscriber.

NOTE

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

Connection -- Web Page Dialog

Databases

Connection

Database connections can be global to the Insbridge Framework or unique to the Subscriber.

Subscriber: Global

Name: controller

Server: LOCALHOST

Server Type: SQLServer

Catalog: IB_CLIENT_MARY

Catalog Type: Other

Query Buffer:

Tablespace:

Schema:

User:

Password:

Save Cancel

Figure 39 Setting up the Global Database Connection

Select Global for the Subscriber. The IB_CLIENT database is a global database and is not unique to the subscriber. This information cannot be changed once you have saved it.

The Database **Name** cannot be changed once you have saved it.

The **Server** is the database server name or IP address which ever is resolvable by the IBRU web server.

The **DB Server Type** is the type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2.

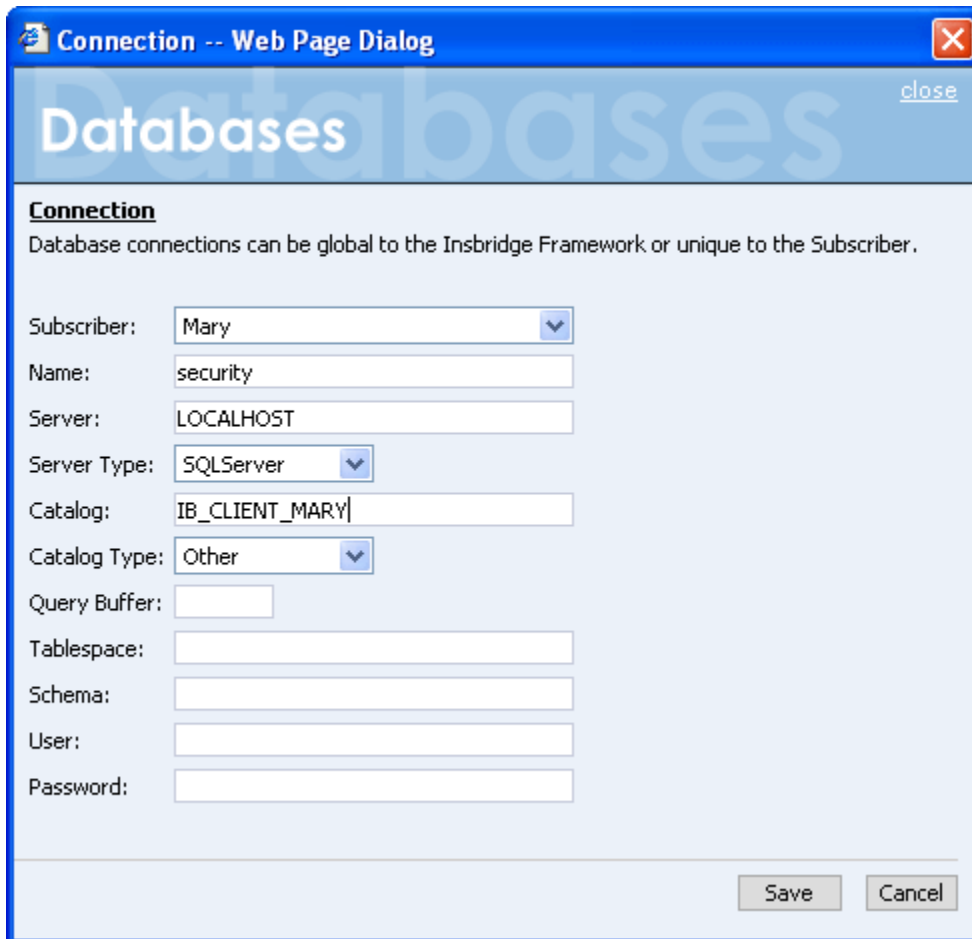
The **Catalog** is the name of the catalog in the database. For DB2 servers, this is the System DSN Name.

The **Catalog Type** is the type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater.

Tablespace and Schema are not required for this connection. The User is the SQL Server user (ibru) assigned as database owner on page 36, if needed.

Add the next database. Select the **Add Database Connection** link again.

In the next popup dialog, fill out connection information for the IB_CLIENT database using your subscriber ID. Name this one security.



The screenshot shows a web-based dialog box titled "Connection -- Web Page Dialog". The main heading is "Databases". Below this, there is a section titled "Connection" with the text: "Database connections can be global to the Insbridge Framework or unique to the Subscriber." The form contains the following fields and values:

- Subscriber: Mary (dropdown menu)
- Name: security (text input)
- Server: LOCALHOST (text input)
- Server Type: SQLServer (dropdown menu)
- Catalog: IB_CLIENT_MARY (text input)
- Catalog Type: Other (dropdown menu)
- Query Buffer: (empty text input)
- Tablespace: (empty text input)
- Schema: (empty text input)
- User: (empty text input)
- Password: (empty text input)

At the bottom right, there are "Save" and "Cancel" buttons.

Figure 40 Setting up the Security Database Connection

If performing just a SoftRater node installation, then this next step can be skipped.

Create a connection for RateManager using your subscriber id. Name this one rm.

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.

The screenshot shows a web-based dialog box titled "Connection -- Web Page Dialog". The main heading is "Databases". Below this, the "Connection" section explains that database connections can be global to the Insbridge Framework or unique to the Subscriber. The form contains the following fields and values:

- Subscriber: Mary (dropdown menu)
- Name: rm (text input)
- Server: LOCALHOST (text input)
- Server Type: SQLServer (dropdown menu)
- Catalog: IBRM_MARY (text input)
- Catalog Type: RateManager (dropdown menu)
- Query Buffer: (empty text input)
- Tablespace: (empty text input)
- Schema: (empty text input)
- User: (empty text input)
- Password: (empty text input)

At the bottom right, there are "Save" and "Cancel" buttons.

Figure 41 Setting up the RateManager Database Connection

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

Browse to **SoftRater>Explorer>Subscriber name**.

NOTE

This default environment is not required if performing a SoftRater node installation. Other environments will still need to be created to load SRPs to the IBSR databases. More details are provided in the online help on how to set up your SoftRater environments.

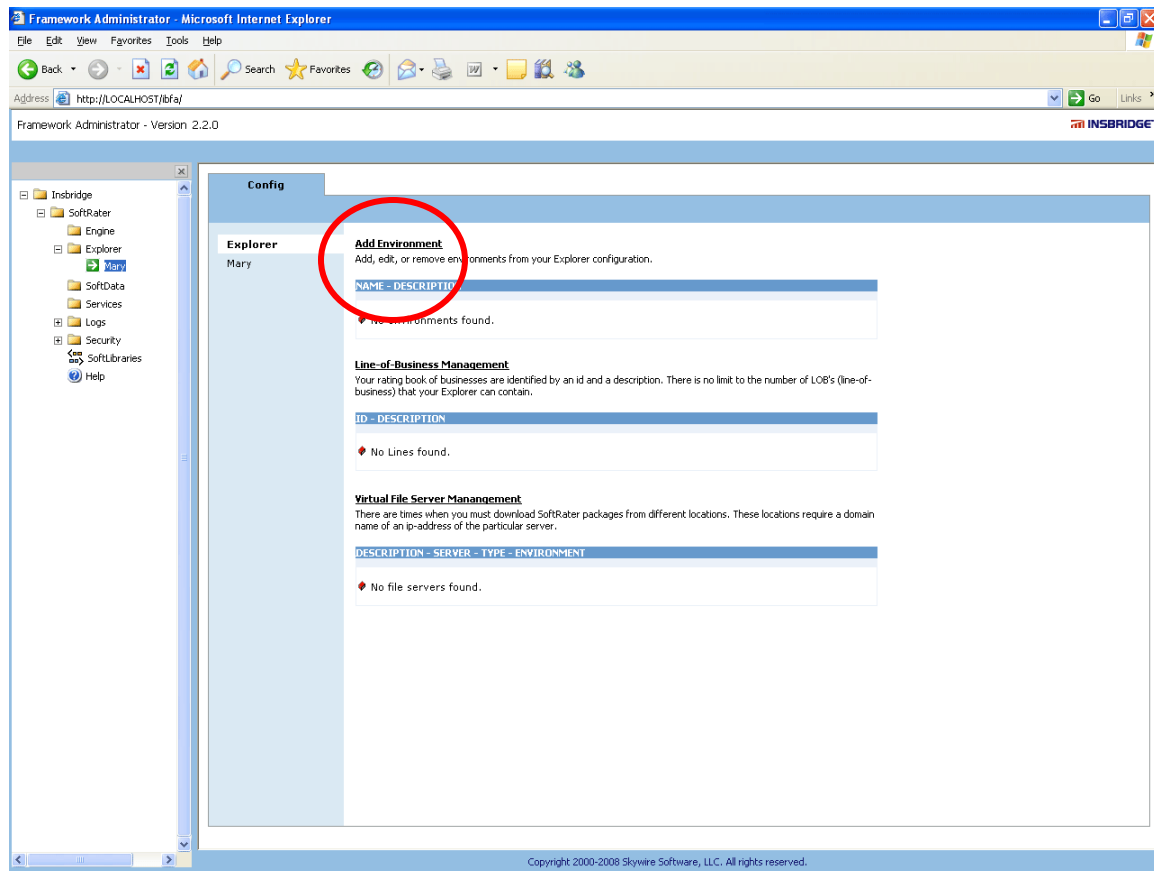


Figure 42 Create a Rating Environment

Click on **Add Environment**.

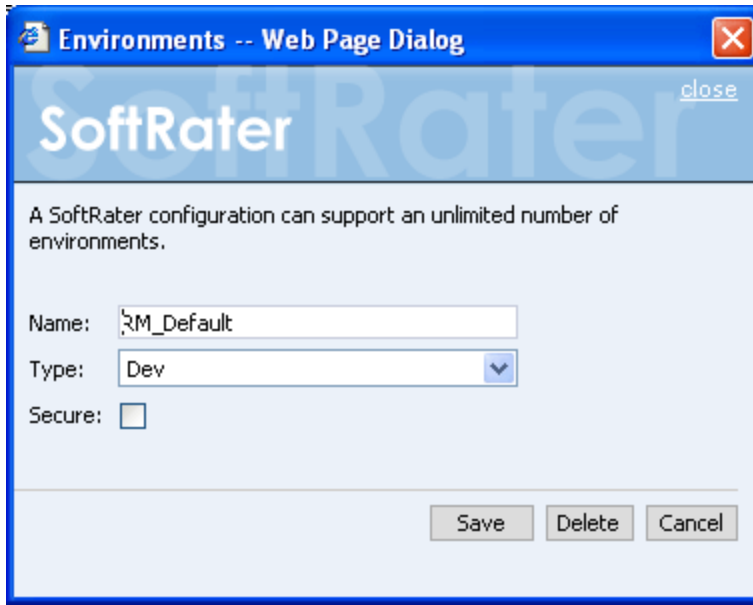


Figure 43 Entering Name and Environment

The name and type are totally dependent on how your particular environment is designed.

There are three types of Environments:

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

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

Defining the Environment

Select your company name underneath Config on the left hand side to see the configuration for the new environment created.

Framework Administrator - Version 2.2.0

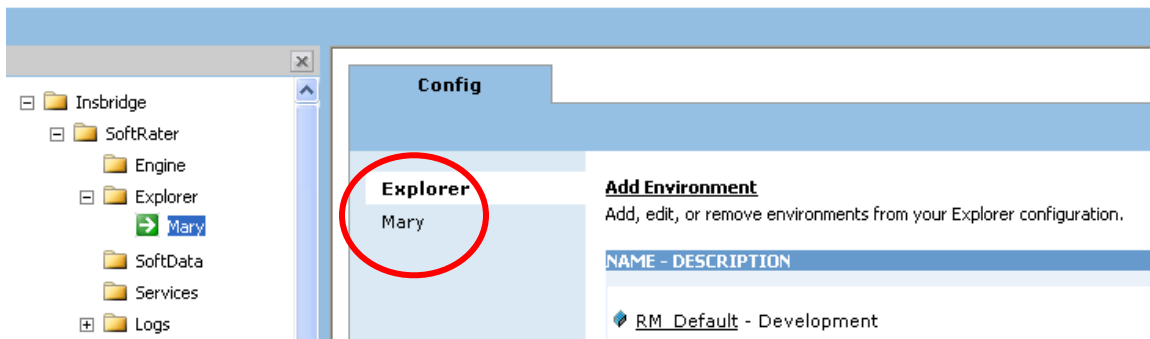


Figure 44 Obtaining Environment Information

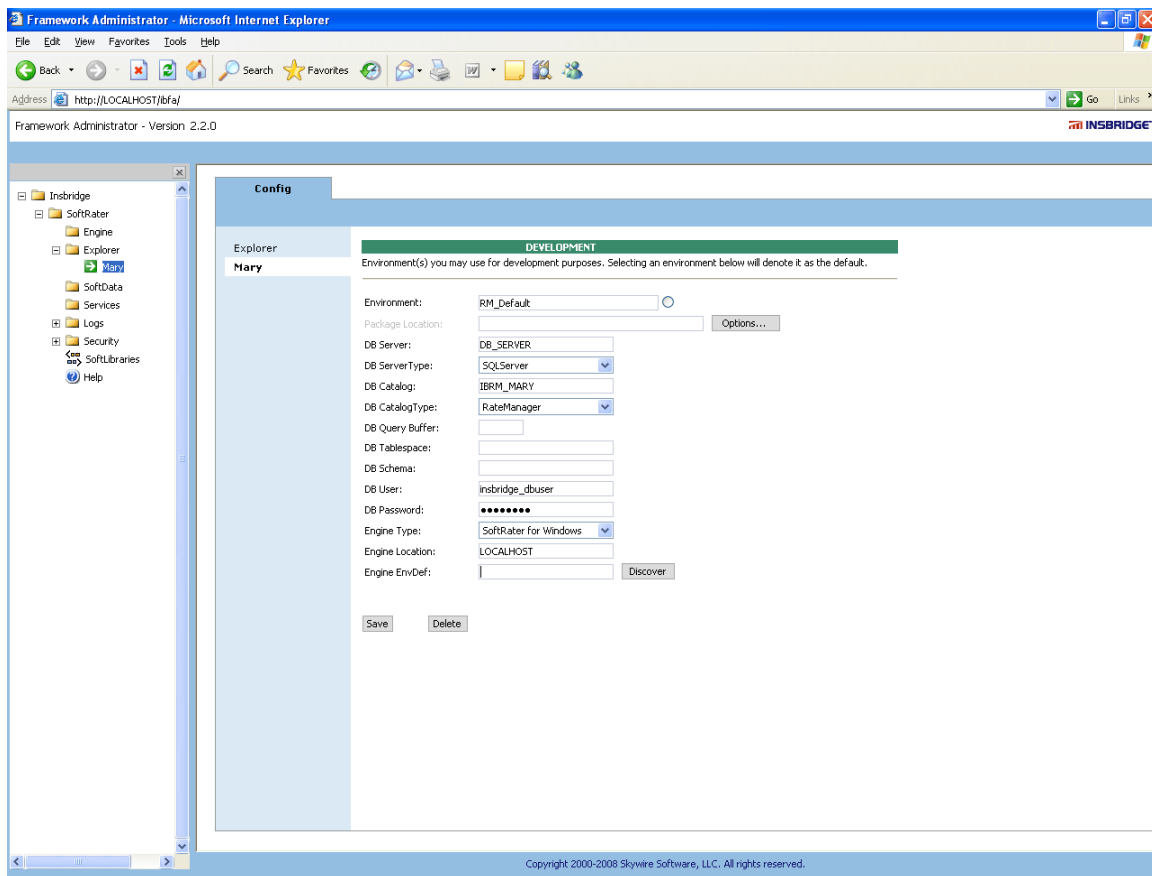


Figure 45 Editing Environment

Enter in the DB_SERVER name with the real name of the SQL Server where the IBRM database resides.

Only the information shown above is required for this connection; Environment, DB Server, DB Server Type, DB Catalog, DB Catalog Type, DB User, DB Password, Engine Type and Engine Location. The Package Location, DB Query Buffer, DB Tablespace, DB Schema, and Engine EnvDef can remain blank or filled out as needed. The user account should be the database owner (ibru).

For each environment, you can set up the following information:

Environment: The name of the environment. Selecting the radio button next to an environment's name will set it up as the default environment.

Package Location: Physical location of where the packages should be stored. Click **Options...** to run a process to validate the permissions on the directory and certify any packages in the directory. In order for the Framework Administrator to successfully manipulate packages in the location, it must have full control of the directory.

DB Server: The name of the server that houses the database that packages will be loaded to.

DB Server Type: The type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2.

DB Catalog: The name of the catalog in the database.

DB Catalog Type: The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater.

***DB Query Buffer:** For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.

***DB Tablespace:** The name of the table space in the database.

***DB Schema:** The name of the schema that defines the structure of the database.

DB User: Username to access the database.

DB Password: Password to access the database.

Engine Type: The type of SoftRater engine that is used. The available options are: SoftRater for Windows, SoftRater for WebSphere, SoftRater for WebLogic, or SoftRater for JBoss.

Engine Location: The location of the SoftRater engine. If the engine is local to the Framework Administrator (i.e. located on the same server), leave this field as LOCALHOST. If the engine is located on a different server, enter the name in the box.

Engine EnvDef: This field should remain blank, unless the engine is located on a different server. If the **Engine Location** is set to LOCALHOST, leave this field blank. If the **Engine Location** is not LOCALHOST, this should match the name of the environment on the remote server.

NOTE

If you are using an Oracle or DB2 server, the options and requirement will be different. Please see the IBFA guide for more information.

The next step is to install the IBRU Patches.

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 serve as an update to the installation. Rather than having you uninstall and reinstall the system, updates are added to a patch. Patches must be installed after the system installations to bring the system to the latest version.

Open the patches on the server where you installed the Framework Administrator and RateManager. The patches need to be run from the same server as the previous installation.

Start with the Framework Administrator patch.

1. Install the framework update by double-clicking the framework patch MSI. You will be placed on Figure 46.

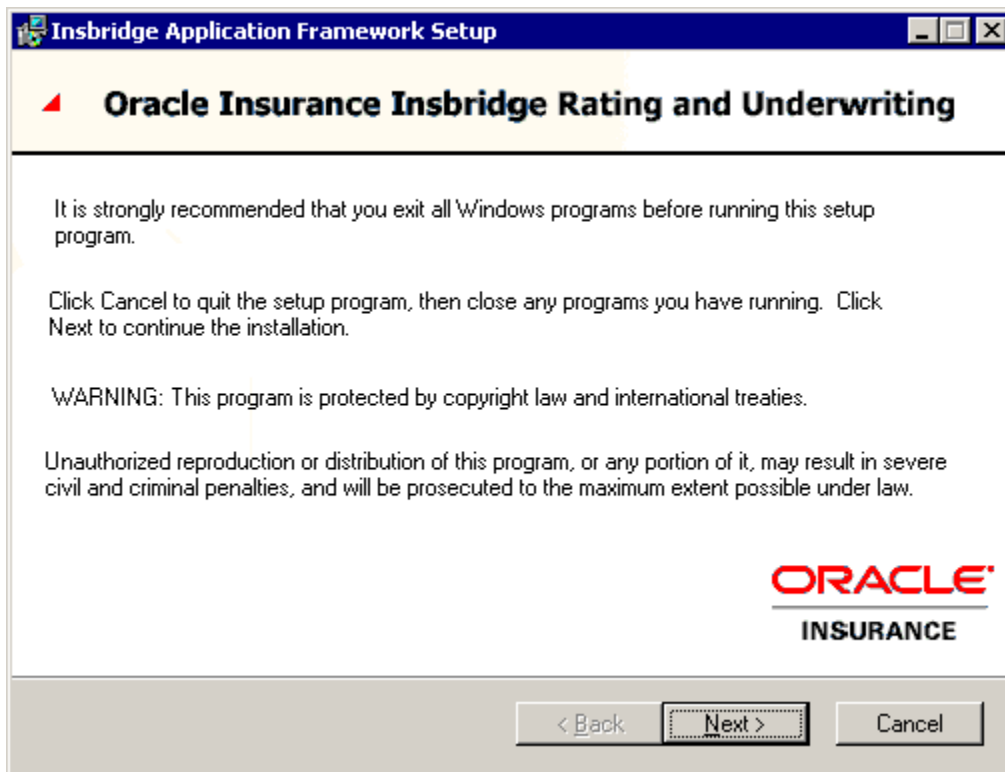


Figure 46 Setup Screen

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
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 47 User Information

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

Click **Next** to continue.

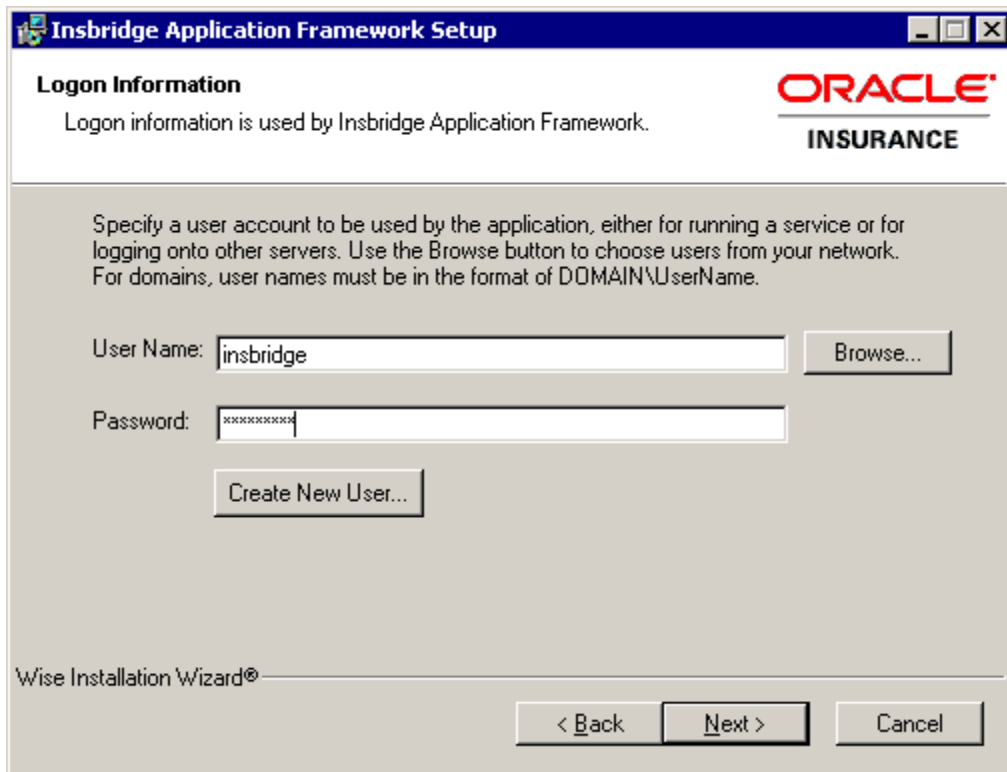


Figure 48 Logon Information

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 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.

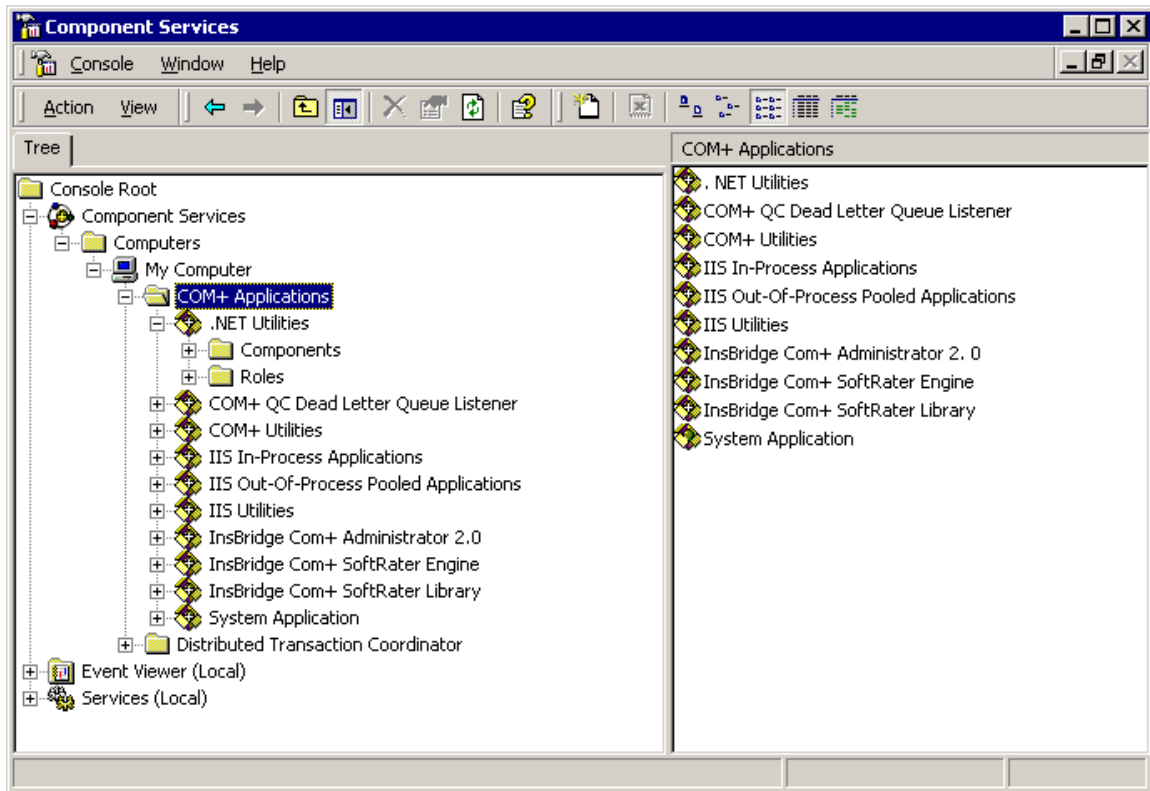


Figure 49 Component Services

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.

RateManager Patch Installation

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

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

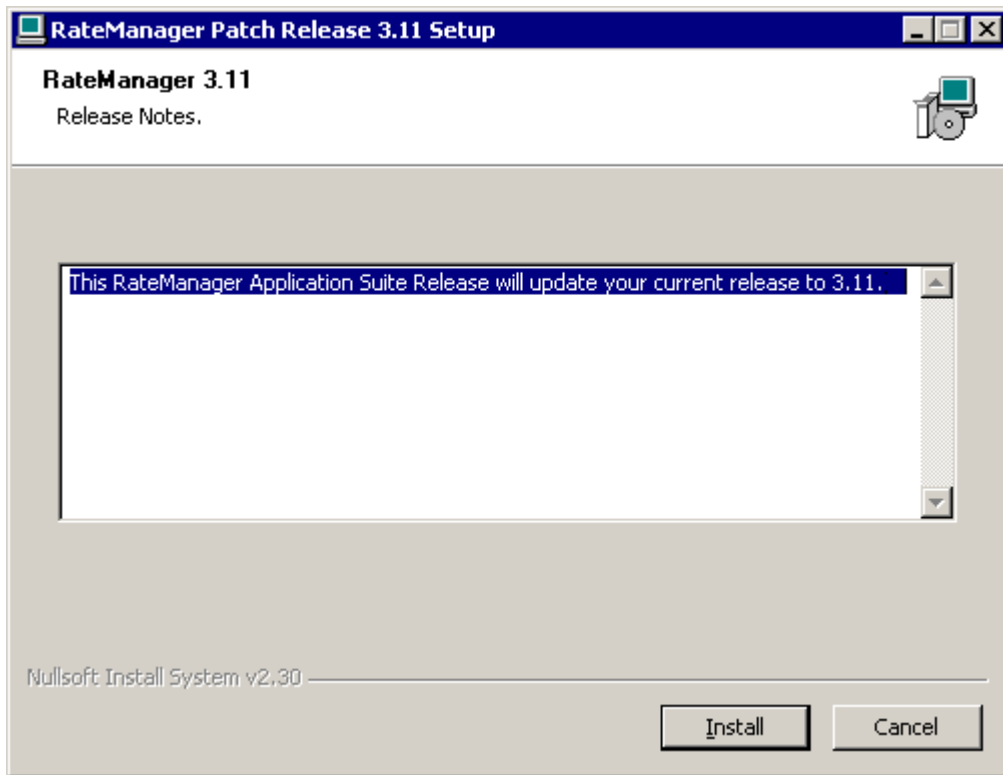


Figure 50 Verifying RateManager Patch

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.

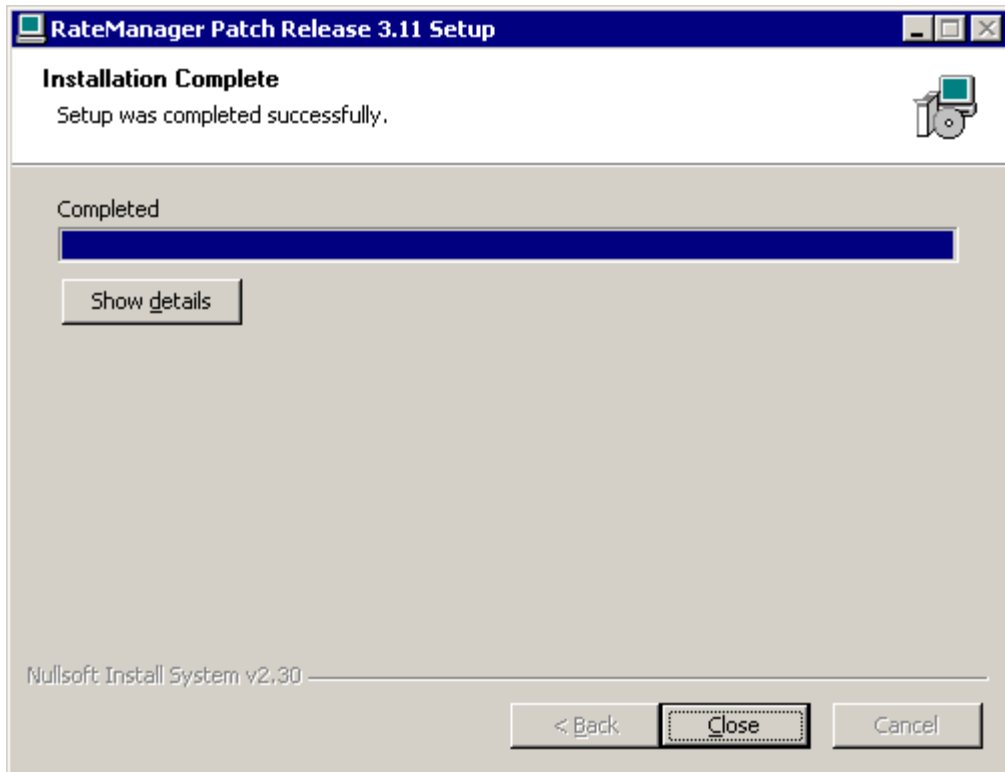


Figure 51 Completed RateManager Patch Installation

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

If any errors are reported, please notify support-skywire_ww@oracle.com immediately.

NOTE

Any Insbridge services will be stopped during the update.

IBRU Database Updates

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.

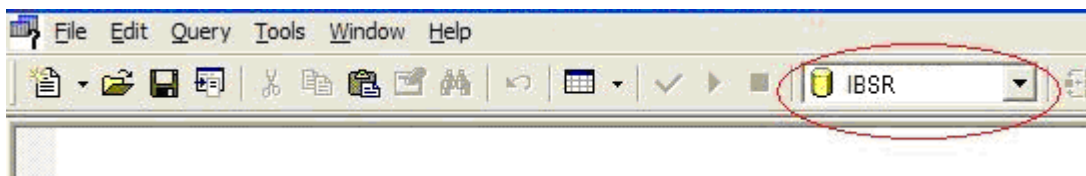


Figure 52 Updating Database

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.

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.

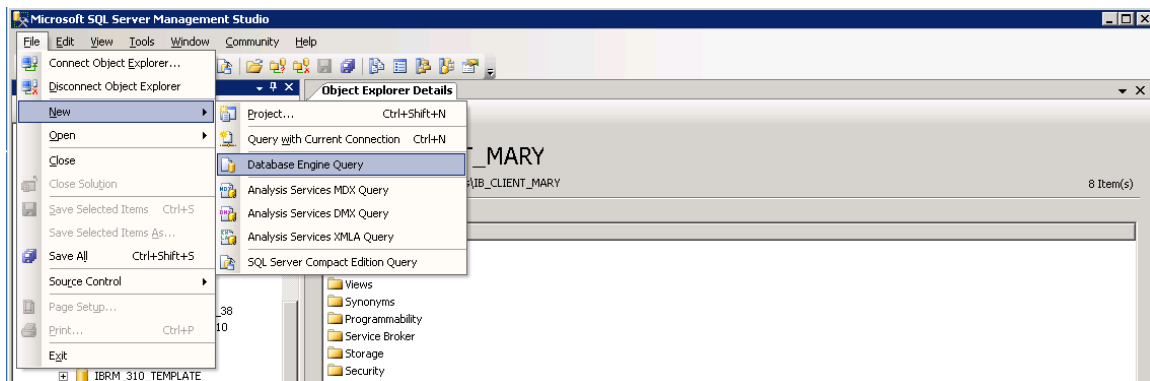


Figure 53 Updating Database

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.

Location of DDL Directory

This is for information only. No action needs to be performed unless a new table needs to be created.

If a database table needs to be added in the SoftRater for Oracle or the SoftRater for DB2 at installation or any time later, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDL folder. I.e. [INSTALL_DIR]/Insbridge/SoftRater/DDL.

Export Insbridge Registry Key for Backup

If performing just a SoftRater node installation, this step can be skipped.

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). This registry key should be exported using **regedit** to a text file and stored in a safe location off the server and/or sent to Insbridge in the event of a catastrophic server failure and the IBRU system needs to be reinstalled.

Export and Import Subscriber Registry Key for SoftRater Node Installation

If performing a SoftRater Node installation, then the encryption stored in the registry key on the server where the RateManager application resides will need to be exported and then imported on the SoftRater Node.

1. On the server where RateManager is installed, open regedit, then navigate to the HKEY_LOCAL_MACHINE>SOFTWARE>Insbridge>Subscribers>SUBSCRIBER_NAME where SUBSCRIBER_NAME equals the name as entered on page 38 and given to you by Insbridge.
2. Select the Registry menu option and select export.

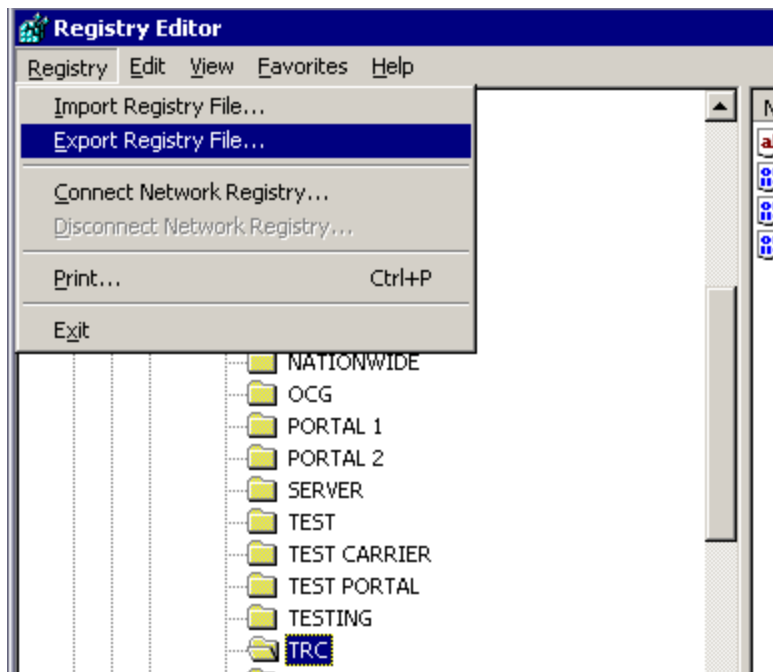


Figure 54 SoftRater Node Installation

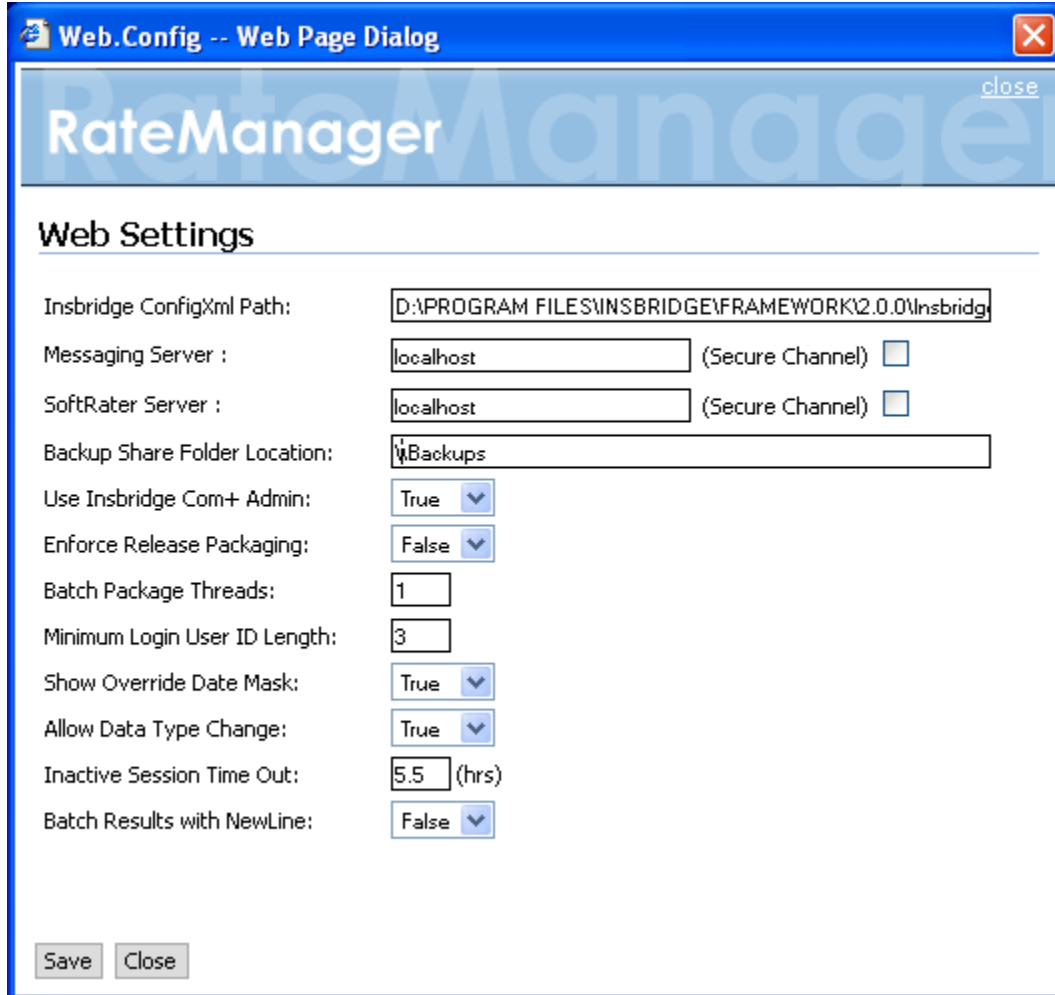
3. Enter the key file name and save this to the desktop.
4. Copy this file to the SoftRater Node on the receiving IBFA.
5. Double-click this file. You will be asked if you wish to continue to import this data into the registry. Select **Yes**.
6. If the import was successful, then you will receive a report that it was successfully installed. If the import fails, please correct the error and try again.

Now the encryption on the RateManager server where the SRPs are created and the SoftRater Node where the SRPs are loaded match.

Advanced Settings for RateManager

If performing just a SoftRater node installation, this step can be skipped.

The RateManager application can be extended to suit many different types of distributed environments. Most of this customization should be performed only with the help of an Insbridge Application Engineer. To access these settings, open the RateManager application in a web browser `http://SERVERNAME/RM/` and at the login screen, **press and hold the left Control and Shift keys and then press S**. This should bring up the following dialog:



The screenshot shows a web browser window titled "Web.Config -- Web Page Dialog" with a "close" button in the top right corner. The main content area has a blue header with the "RateManager" logo. Below the header, the section "Web Settings" is displayed. The settings are as follows:

| Setting | Value |
|-------------------------------|--|
| Insbridge ConfigXml Path: | D:\PROGRAM FILES\INSBRIDGE\FRAMEWORK\2.0.0\Insbridge |
| Messaging Server : | localhost (Secure Channel) <input type="checkbox"/> |
| SoftRater Server : | localhost (Secure Channel) <input type="checkbox"/> |
| Backup Share Folder Location: | \\Backups |
| Use Insbridge Com+ Admin: | True |
| Enforce Release Packaging: | False |
| Batch Package Threads: | 1 |
| Minimum Login User ID Length: | 3 |
| Show Override Date Mask: | True |
| Allow Data Type Change: | True |
| Inactive Session Time Out: | 5.5 (hrs) |
| Batch Results with NewLine: | False |

At the bottom left, there are "Save" and "Close" buttons.

Figure 55 Configuring Advanced Settings

By default these settings should be OK to start when deploying a standard RateManager application. One item that can be configured is the location for the backup files. RateManager has the ability, if the server administrator and database administrator agree to allow it, to perform a database backup of the IBRM_xxxx database and then the zip it up to be sent to Oracle Insurance Support.

This means that business users of RateManager require the assistance of either the server administrator or the database administrator in the event that Oracle Insurance Support requests a

database snapshot. This configuration is totally dependent on the corporate environment where IBRU is installed and whether permissions will be granted to the business users to perform this action. The default is turned off.

Working with RateManager for the First Time

The URL for RateManager will be <http://INSTALLATIONSERVERNAME/RM>. Where Installation server is the server where RateManager was installed.

This will place you on the RateManager login screen.

1. To login for the first time, select your company from the drop down menu.
2. The user name will be demo.
3. The password will be password.

To change your password, go to Administration ➤ Change Password.

For more on user management, please see the RateManager User Guide.

NOTE

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

NOTE

If you are having difficulties logging into RateManager, please check the error logs in IBFA.

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.

Permission Notes

Permissions Required by the ASPNET Microsoft .NET User Account

These are the permissions required by the ASPNET local user account as set forth by Microsoft in order for ASP.NET based applications to run properly.

Read / Write Access is required for:

- The %installroot%\ASP.NET Temporary Files directory. Subdirectories beneath this root are used for dynamically compiled output. Usually located in %WINDIR%\Microsoft.NET\Framework\v2.0.50727.
- %temp% directory, which is used by the compilers during dynamic compilation.

Read Access is required for:

- The application directory (e.g.: the location where you installed the Insbridge applications).
- The %installroot% hierarchy to make it possible to access to system assemblies.
- The web site root directory (e.g.: the path at which the “Default Web Site” points, typically %systemdrive%\inetpub\wwwroot.
- The Global Assembly Cache, %windir%\assembly.

Default SQL Server Database User Roles and Permissions Required

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

NOTE

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

- **IBSR Database User** – Account requires dbo access to the IBSR databases because it creates new tables in the SoftRater (IBSR) database dynamically when or if a new line of business SRP (SoftRater Package) is loaded to the SoftRater system.
- **IBRM_xxxx and IB_CLIENT Database User** – Account requires execute access against the Insbridge stored procedures and full access to the Insbridge schema.

Extended Permission Required by the Insbridge User

If the Insbridge user account will not have full administrative permissions on the server where the Insbridge Framework is installed, then certain operations from the Insbridge Framework Administrator will not be available.

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. There are a number of ways to perform this and more details can be obtained from Microsoft at <http://support.microsoft.com/?kbid=288129>. This article describes several methods for granting users the rights to manage services in Windows 2000 Server. By default in Windows 2000 Server, only Administrators and Power Users can start, stop, or pause services. This article describes techniques for granting these rights to other users and groups.

The following is one of the methods outlined in the above-mentioned KB Article:

1. Click **Start**, click **Run**, and then type MMC.
2. On the **Console** menu, click **Add/Remove Snap-in**.
3. Click **Add**.
4. Select the **Security Configuration and Analysis** snap-in, and then click **Add**.
5. Click **Close**, and then click **OK**.
6. In the MMC, right click the **Security Configuration and Analysis** item, and then click **Open Database**.
7. Give a name for the database, and then browse to where you would like to store it.
8. When prompted, select a Security Template to import. For example, the "basicwk.inf" contains values for the standard settings found on a Windows 2000 Professional computer.
9. In the MMC, right click the **Security Configuration and Analysis** item and then click the **Analyze Computer now** option. Choose a location for the log file, when prompted.
10. After analysis is complete, configure the service permissions as follows:
 - a. Double-click the **System Services** branch in the MMC.
 - b. Right click the service that you want to change, and then click **Security**.
 - c. Click **Edit Security**.
 - d. Add user accounts as required, and configure the permissions for each account. By default, the user will be granted "Start, stop and pause" permissions.
11. To apply the new settings to the local computer, simply right click the **Security Configuration and Analysis** item, and then click the **Configure Computer Now** option.

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.

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.

Database Migrations in RateManager

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 System you receive an error or need a question answered, please contact Insbridge Support at support-skywire_ww@oracle.com.

Address any additional inquiries to:

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