

**Oracle® Insurance Rules
Palette**

**Installation
Instructions**

Rules Palette Users

Version 9.1.0.0.0

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Introduction

The Rules Palette can be downloaded from the Rules Palette Web Application Utility. Your build manager will send the servername and port of the Web Application Utility, which you will type into the URL given in the instructions below. You will also receive three sets of user IDs and passwords. You will need this information when you create an environment connection in the Rules Palette.

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

Prerequisites

- Servername and port for the Rules Palette Web Application Utility. This will come from your build manager.
- Rules Palette log-in user ID and password. This will come from your build manager.
- Database user ID and password. This will come from your build manager.
- IVS database user ID and password. This will come from your build manager. This database information is only necessary if you are using an IVS environment.
- Location of the database driver. Each type of database requires a specific driver(s). You will need to point to the location of the driver(s) during the environment creation.

Installation

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

Steps to Download the Rules Palette

1. In your browser, go to `http://servername:portnumber/PaletteConfig/` replacing the **servername** and **portnumber** with the correct information from your build manager.
2. Click **Download Palette Version**.



Figure 1: Web Application Utility Download link

3. Click **Download** next to the version of the Rules Palette that you want to download.



Figure 2: Web Application Utility Download list

4. Click **Open** from the File Download window when it asks what you want to do with the file. It will take a few minutes for the file to download. Once the file has been downloaded, it should automatically open with the compression software that is available on your system. If you do not have compression software, contact your IT department.
5. Extract the files using your compression software and save the files to your local computer in the following folder:

C:/Program files/Oracle/RulesPalette

Note: You may need to create a folder called Rules Palette within C:/Program Files/Oracle if one does not already exist.

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

C:\Program Files\Oracle\RulesPalette\bin

8. Create a shortcut on the Windows XP. You should create a shortcut on your desktop to the executable file so that it is easier to access the Rules Palette. To create a shortcut, right-click on the asgraphiculeside.exe file (*C:/Program Files/Oracle/RulesPalette/bin*) and select **Create Shortcut**. Once the short-cut appears, drag it out onto your desktop.

Steps to Create an Environment Connection

1. Double-click the Rules Palette short-cut icon you created on your desktop.
2. Click the **Main Explorer** tab.
3. Right-click anywhere in the tab and select **Create Environment from Web Service**. The environment creation wizard will open.

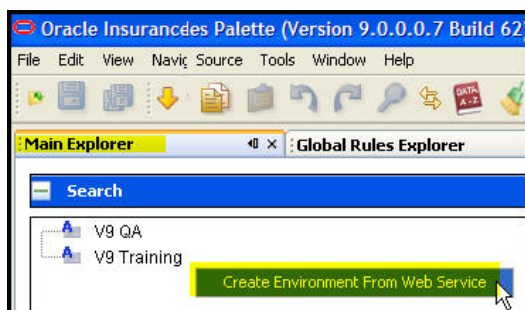


Figure 3: Rules Palette Right-Click Menu Option for Environment Creation

4. Enter an Environment Alias. This should be a descriptive name for the environment that will allow you to distinguish between the various environments you create.
5. Enter the Configuration Server information provided by the Build Manager.
6. Enter the Configuration Port information provided by the Build Manager.
7. Enter the Palette user name provided by your Build Manager.
8. Enter the Palette password provided by your Build Manager.
9. Check the auto log-in box if you want the application to automatically log you on after environment creation is complete.
10. Click **Test Configuration Server** to test your environment connection. If the connection is successful, click **Next**.

Note: If you receive an error message that says your username and password are incorrect, check your configuration server and port information as well. There are instances where errors in these fields also trigger the username and password error.

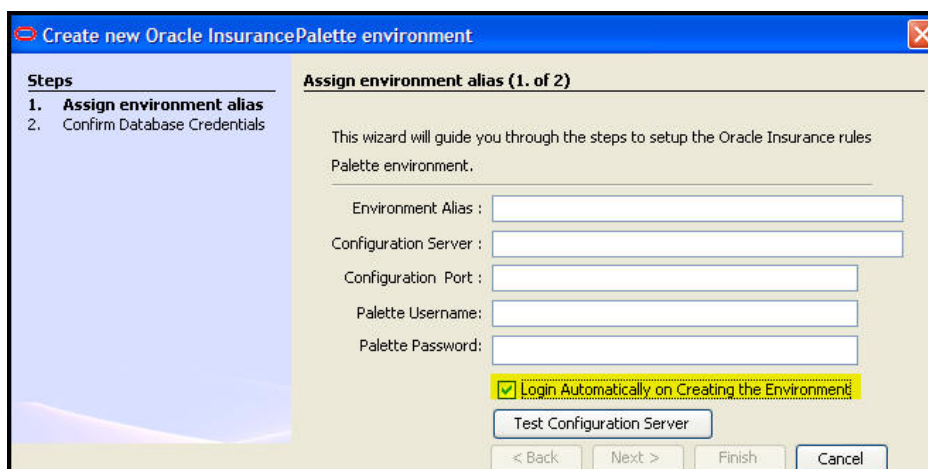


Figure 4: Step 1 of Environment Creation Wizard

11. Browse to the location of the jdbc driver files. MS SQL Server uses the **jtds.jar**. Oracle uses the **ojdbc14.jar**. DB2 uses three files and all three should be highlighted at the same time when you select a driver in the Browse window (**db2jcc**, **db2jcc_license_cisuz**, and **db2jcc_license_cu**)

Note: You will only need to specify the .jar file location the first time you set-up an environment. If you create additional environments, this Browse field will not display.

12. Enter the **User ID** and **password** for the OIPA database. The build manager will send this information to you. This is different from the user ID and password you will use to log-on to the Rules Palette.
13. Enter the **User ID** and **password** for the IVS database. The build manager will send this information to you. This is different from the user ID and password you will use to log-on to the Rules Palette.

Steps

1. Assign environment alias
2. **Confirm Database Credentials**

Confirm Database Credentials (2. of 2)

Environment : Y9 Training Environment

Type :

Debug WebService :

OIPA Database : SQLServer2005

Enter the location for the SQLServer2005 JDBC .jar file above

Host :

Database Name :

User ID :

Password :

IVS Database

Host :

IVS Database Name :

Environment Name : Track :

User ID :

Password :

Figure 5: Step 2 of the Environment Creation Wizard

14. Click **Test Connection** to test your connection. Once both connections are successful, click **Finish**.

If you did not choose to automatically log-on after environment creation, you can do so now by right-clicking on the new environment node you just created. Select **Log-on** and enter your Rules Palette user ID and password, which are provided by the build manager.

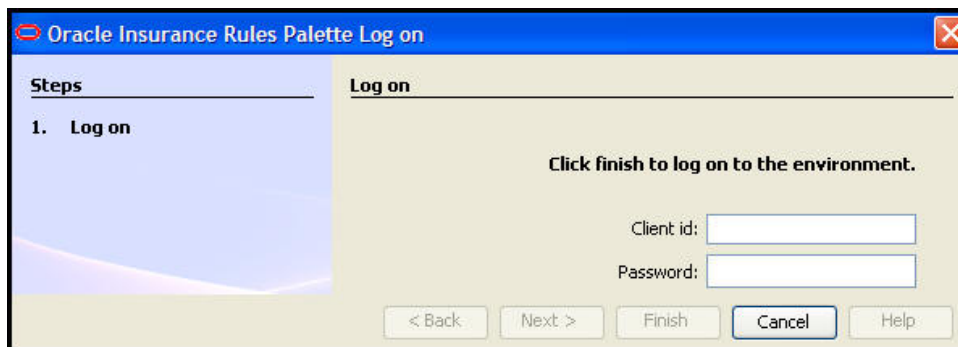


Figure 6: Log-on Window

Note: Refer to the Rules Palette help system to learn how to use the Rules Palette application. The help system can be accessed from inside the Rules Palette application.