

**Oracle® Insurance Policy
Administration**

**Rules Palette
Environment Connection**

User Installation Instructions – Step 4

Version 9.4.0.0

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OVERVIEW

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

The Rules Palette can be downloaded from the Rules Palette Web Application Utility. Your build manager will send the hostname and port of the Web Application Utility, which you will type into the URL as explained 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.

Customer Support

If you have any questions about the installation or use of our products, please visit the My Oracle Support website: <https://support.oracle.com>, or call (800) 223-1711.

Prerequisites

- OIPA deployed on a server of your choice (step two of installation process)
- Web Application Utility deployed on a server of your choice (step two of installation process)
- Database of your choice (step one of installation process)
- Microsoft Windows 2000 or later
- Rules Palette uploaded on Web Application Utility (step three of installation process)
- Hostname and port for the Rules Palette Web Application Utility. This will come from your build manager.
- Rules Palette log-in user name and password. This will come from your build manager.
- Database user name and password. This will come from your build manager.
- IVS database user name and password. This will come from your build manager. This database information is only necessary if you are using an IVS environment.
- Location of the database driver. Each type of database requires a specific driver(s). You will need to point to the location of the driver(s) during the environment creation. This will come from the build manager.

DOWNLOAD RULES PALETTE

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

Steps to Download the Rules Palette from the Web Application Utility

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

Note: You do not need to enter a user name and password.



Web Application Utility Download link

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



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.

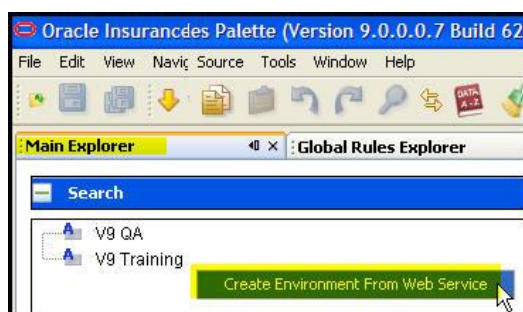
6. Launch the Rules Palette via the executable file **asgraphicruleside.exe**. This file will run the Rules Palette. To launch the application, double-click on the executable file. This executable file can be found in the following directory:
C:\Program Files\Oracle\RulesPalette\bin
7. Create a shortcut on your Desktop. This will make it easier to access the Rules Palette. To create a shortcut, right-click on the asgraphicruleside.exe file (C:\Program Files\Oracle\RulesPalette\bin) and select **Create Shortcut**. Once the short-cut appears, drag it out onto your desktop.

CREATE ENVIRONMENT CONNECTION

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

Steps to Create an Environment Connection

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



Rules Palette Right-Click Menu Option for Environment Creation

4. Type an **Environment Alias**. This should be a descriptive name for the environment that will allow you to distinguish between the environments you create. Only alphabet characters are allowed in the name. Numbers and special characters are not supported.
5. Type the **Configuration Server** information provided by the build manager.
6. Type the **Configuration Port** information provided by the build manager.
7. Type the **Palette User name** provided by your build manager.
8. Type the **Palette Password** provided by your build manager.

9. Check the automatic log in box if you want the application to automatically log you on after environment creation is complete. This is not necessary. It is only for convenience.
10. Click **Test Configuration Server** to test your environment connection. If the connection is successful, click **Next** and advance to step 11. If your connection fails, contact your build manager.

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

The screenshot shows a Windows-style dialog box titled "Create new Oracle InsurancePalette environment". On the left, a "Steps" pane lists two steps: "1. Assign environment alias" (which is selected) and "2. Confirm Database Credentials". The main area is titled "Assign environment alias (1. of 2)". It contains a descriptive text: "This wizard will guide you through the steps to setup the Oracle Insurance rules Palette environment." Below this are five input fields: "Environment Alias:", "Configuration Server:", "Configuration Port:", "Palette Username:", and "Palette Password:". A checkbox labeled "Login Automatically on Creating the Environment" is checked. Below the checkbox is a "Test Configuration Server" button. At the bottom are four navigation buttons: "< Back", "Next >", "Finish", and "Cancel".

Step 1 of Environment Creation Wizard

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

Steps

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

Confirm Database Credentials (2. of 2)

Environment : V9 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 :

Step 2 of the Environment Creation Wizard

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

LOG ON THE RULES PALETTE

If you did not choose to automatically log on after environment creation, you will need to do so now.

Steps to Log on the Rules Palette

1. Right-click on the new environment node you created and select **Log on**.
2. Type your Rules Palette user name in the **Client ID** field. This is the same user name you used in step one of the Environment Creation Wizard.
3. Type your password in the **Password** field. This is the same password you used in step one of the Environment Creation Wizard.
4. Click **Finish**.

Log on Window

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

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