

Oracle Insurance

Data Capture Installation & Upgrade Guide

Release 4.5

February 2011

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Oracle Insurance Data Capture Installation & Upgrade Guide

Release 4.5

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Primary Authors: Mary Elizabeth Wiger

Contributing Authors:

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PREFACE

Welcome to the *Oracle Insurance Data Capture Installation and Upgrade Guide*. Oracle Insurance Data Capture (OIDC) is a Web-based software application that streamlines data capture by allowing insurers to create and configure questions and rules through an intelligent front-end data capture web application.

If you are updating from a previous release, you may notice component names have been updated. Designer is now Palette and Questionnaire is now Worksite.

AUDIENCE

This guide is intended for system administrators, installers, database administrators and others tasked with installing and configuring the Oracle Insurance Data Capture (OIDC) system and associated databases.

E-DELIVERY

Oracle Insurance Data Capture 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 OIDC 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 OIDC 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. You may be asked to provide the part numbers or the filename if you contact Oracle Insurance Support.

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance web site:
<http://www.oracle.com/industries/insurance/index.html>
- If you need assistance with an Oracle Insurance Data Capture, please log a Service Request using My Oracle Support at:
<https://support.oracle.com/>.

CHECKLIST OF REQUIREMENTS AND PROCEDURES

New Installation Checklist

The following checklist can be used to help in a **NEW** installation of OIDC.

- ☐ **Check Web Server for needed dependencies**
 - ☐ IIS Installed
 - ☐ MSMQ
 - ☐ MDAC 2.8
 - ☐ Microsoft .NET Framework version 4.0
 - ☐ MSDTC
 - ☐ IBFA Version 4.1.0 installed. Version 4.1.0 is found in Oracle Insurance Insbridge Rating and Underwriting Release 04.01.00. Please request this version from Oracle Support.
- ☐ **Check Database Server for needed requirements**
 - ☐ Proper Network Connection to Database Server
 - ☐ MS SQL Server 2005 SP2 with SQL Server Management Studio **OR**
MS SQL Server 2005 Express with SQL Server Management Studio
- ☐ **Install OIDC Database**
 - ☐ Restore System database
 - ☐ Restore Client database
 - ☐ Restore Log database
- ☐ **Install Worksite**
- ☐ **Install Palette**
- ☐ **Application Pool**
- ☐ **Virtual Directory Update**
- ☐ **Configure OIDC**
 - ☐ Change sysadmin password
 - ☐ Verify entries on Administration page

Update Checklist

The following checklist can be used to help with an **UPGRADE** of OIDC.

- ☐ **Upzip the DBUpdater.zip file and park DBUpdate folder**
- ☐ **Run the DBUpdaterInstall.msi**
- ☐ **Uninstall previous version – Questionnaire or Engine**
- ☐ **Run 4.5 Worksite Setup.exe**
- ☐ **Uninstall previous version – Designer or Palette**
- ☐ **Run 4.5 Palette Setup.exe**

REQUIREMENTS

SERVER REQUIREMENTS

A full installation of Windows Server 2003 is required. The following configuration assumes that the administrator of the server to be generally familiar with managing a Windows 2003 server.

Most 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 6.0**
- **MSMQ – Microsoft Message Queuing Services**
- **MDAC 2.8**
- **Microsoft .NET Framework, version 4.0**
- **MSDTC**

Internet Information Services (IIS) 6.0

Oracle Insurance Data Capture (OIDC) is a web based application and requires IIS to be installed before the OIDC installation to facilitate the default web virtual directories creations.

The subcomponents of Application Server needed by OIDC are:

- 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 OIDC 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, ASP.NET v4.0 must be enabled in order for OIDC 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:

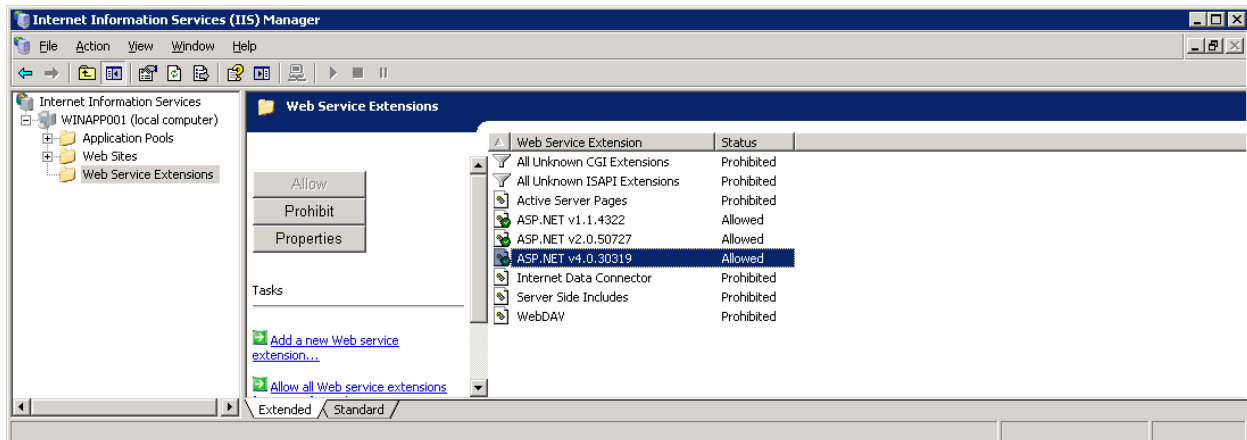


Figure 1 Enabling Active Server Pages and ASP.NET

NOTE: The OIDC installer will check for ASP.NET 4.0. If 4.0 cannot be found, you will need to install it in order to continue. After installing 4.0, please verify that ASP.NET 4.0 is enabled.

Message Queuing Services

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 needing to access any Active Directory unless specified by your information support services. OI DC utilizes by default private message queues that have no need for routing.

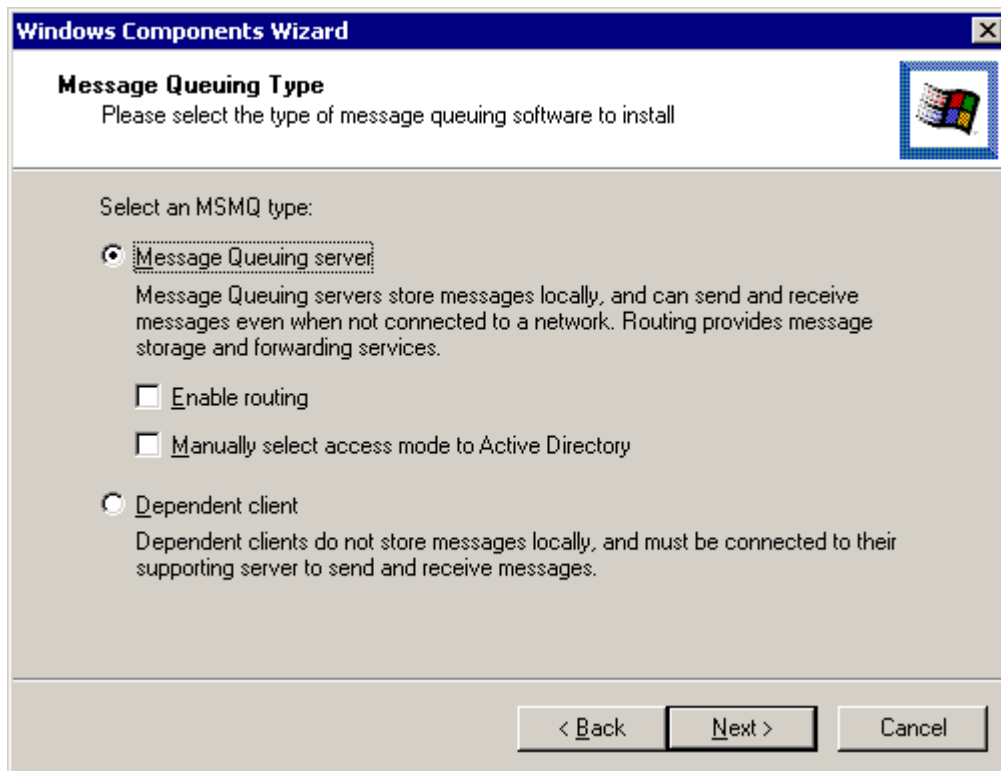


Figure 2 Message Queuing Type

MDAC 2.8

If OI DC 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.

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.

Microsoft .NET Framework

The OIDC installation will check for .NET 4.0 Framework. If .NET 4.0 Framework cannot be found, you will need to install it.

It is highly recommend that you install the .NET Framework after installing IIS in order to update all the web applications to utilize the ASPNET system. This can be doubled checked by opening Internet Service Manager and right clicking the Default Web Site, selecting properties, then select the Home Directory tab. Click the Configuration... button and scroll down.

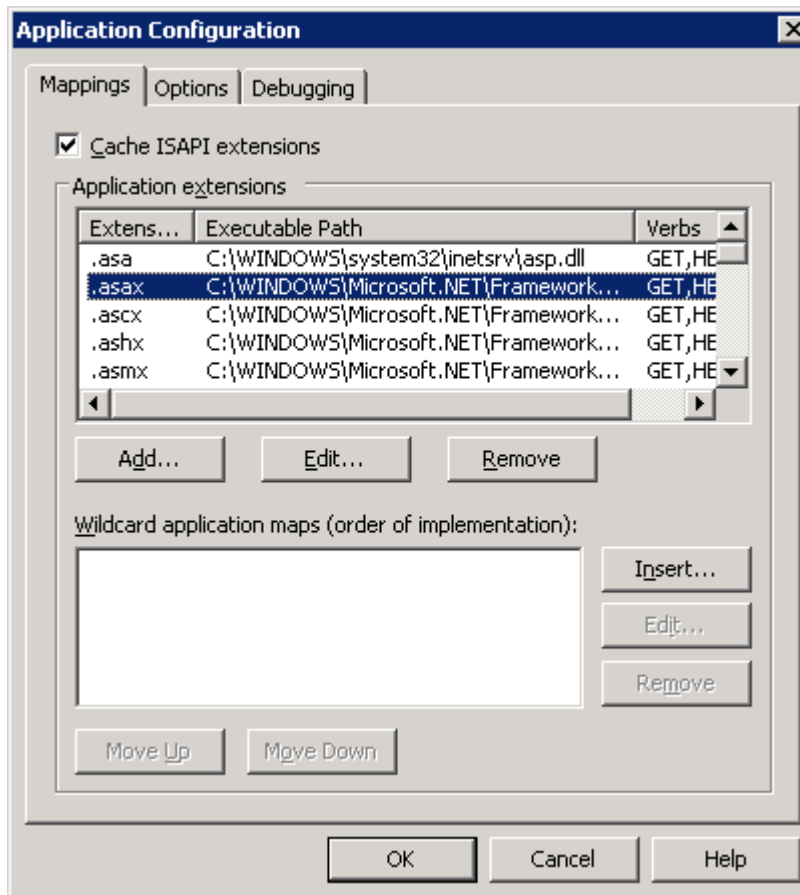


Figure 3 Installing .NET Framework

The ASPNET extensions (.aspx, .asmx, etc.) need to point to %WINDIR%\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll.

MSDTC

Prior to installing OIDC, please check MSDTC availability.

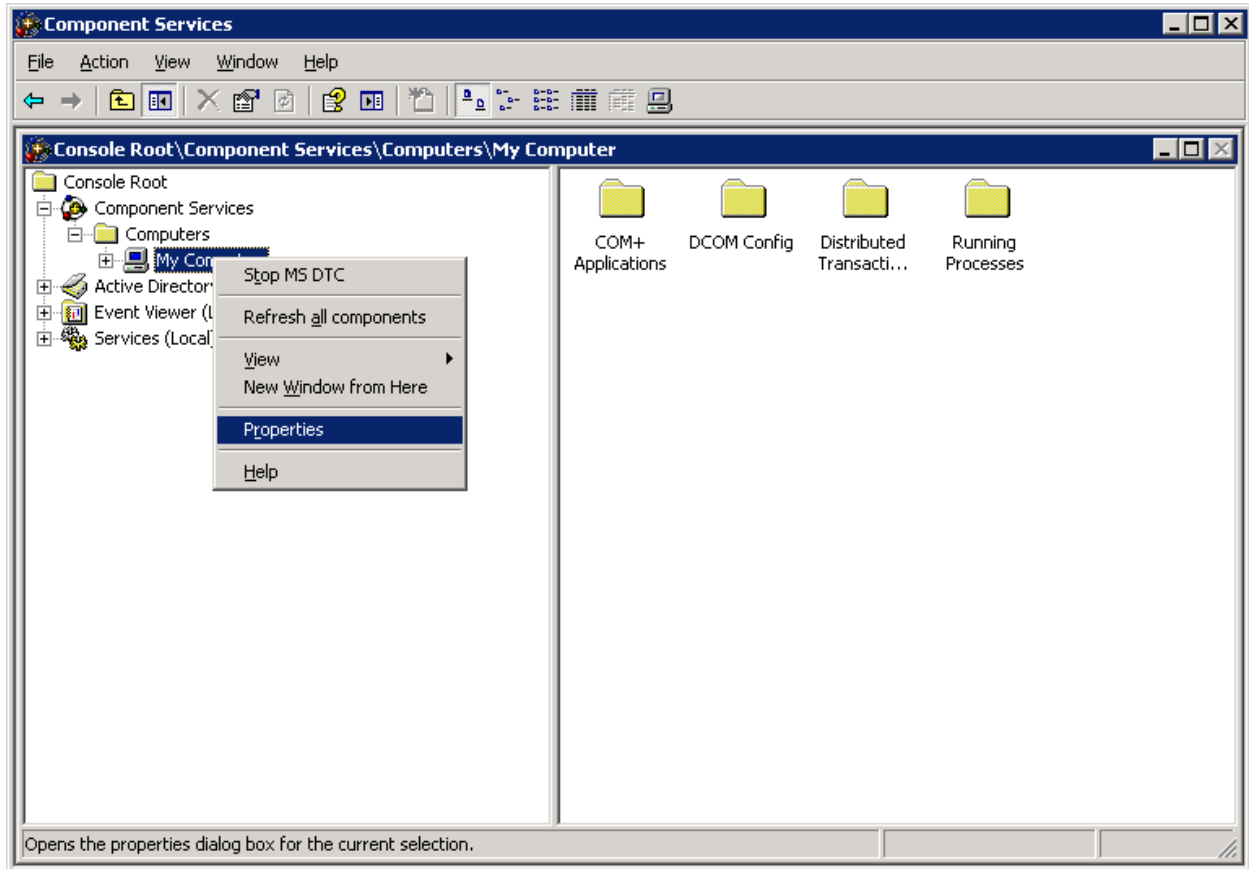


Figure 4 Checking MSDTC

1. Administration Tools → Component Services.
2. Right click on My Computer → Properties.

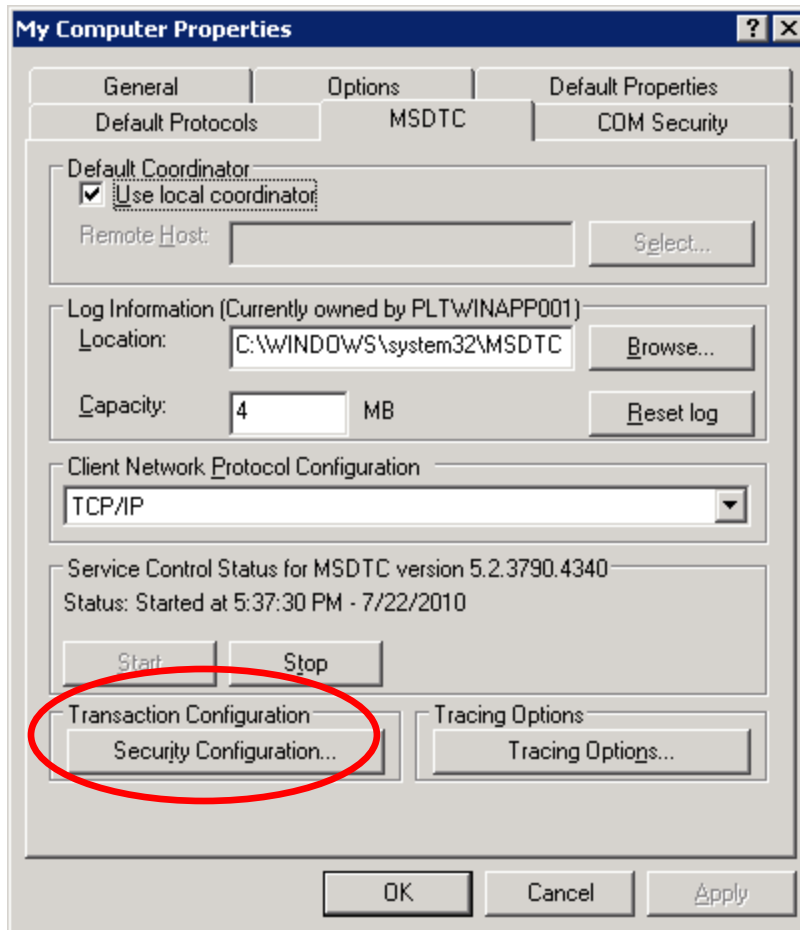


Figure 5 My Computer Properties

3. On the MSDTC tab, make sure of the following:
 - a. **Use local coordinator** in Default Coordinator panel is checked.
 - b. **Start button** in Service Control Status is accessed (the button is grayed out).

4. Click on **Security Configuration...** on Transaction Configuration panel.

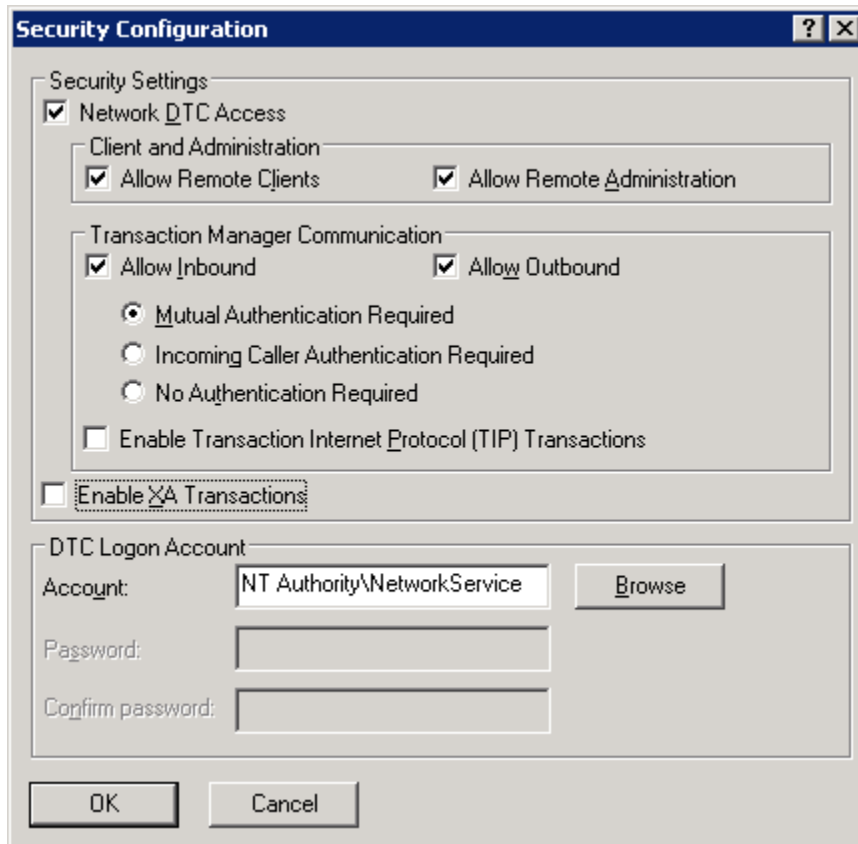


Figure 6 Security Configuration

5. On Security Configuration window, check:
 - a. **Network DTC Access.**
 - b. **Allow Remote Clients.**
 - c. **Allow Remote Administration.**
 - d. **Allow Inbound.**
 - e. **Allow Outbound.**

Mutual Authentication Required is the recommended setting. However, in some environments the No Authentication option may be used.

6. Click **OK** to save. A DTC Console message will be displayed.

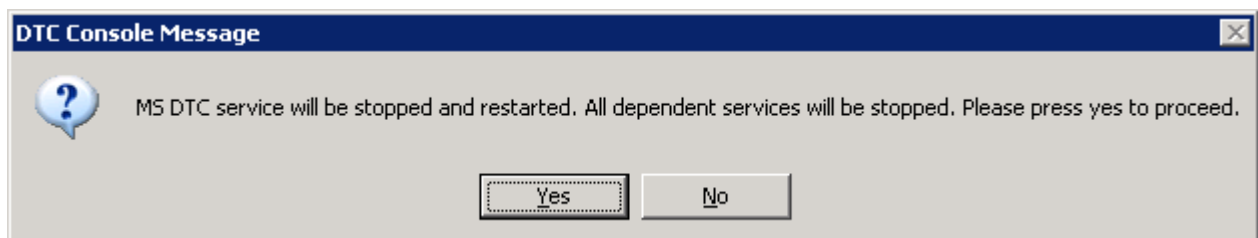


Figure 7 DTC Console Message

7. Click **Yes** on the DTC Console Message. A confirmation message will be displayed.



Figure 8 Restart Message

8. Click **OK** on DTC Console Message.
9. Click **OK** to save.

INSBRIDGE FRAMEWORK ADMINISTRATOR

The Insbridge Framework Administrator (IBFA) is an administrative tool that OIDC uses. OIDC requires that IBFA be installed on the same machine as Palette and Worksite.

NOTE: An instance of Oracle Insurance Insbridge Rating and Underwriting Framework Administration (IBFA) Version 4.1.0 must be in place or installed prior to installing OIDC. IBFA Version 4.1.0 is found in Oracle Insurance Insbridge Rating and Underwriting Release 04.01.00.

NOTE: If you are planning on doing a complete installation of Insbridge Rating and Underwriting, please do the full installation found in the Insbridge Installation Guide. The IBFA installation in this guide is not be a complete installation of the Insbridge Rating and Underwriting System.

Installing IBFA

IBFA is in the Insbridge Rating and Underwriting (IBRU) System download, available 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.

You will only need the **Oracle Insurance - Insbridge Rating and Underwriting Install file**.

1. Open the **Oracle Insurance - Insbridge Rating and Underwriting Install file**.

NOTE: The installation program requires that the installer have administrator rights on the machine where the install is occurring.

NOTE: Please close all open applications before running the Oracle Insurance – Insbridge Rating and Underwriting file.

2. Open the Oracle Insurance – Insbridge Rating and Underwriting file. A Welcome screen will be displayed.

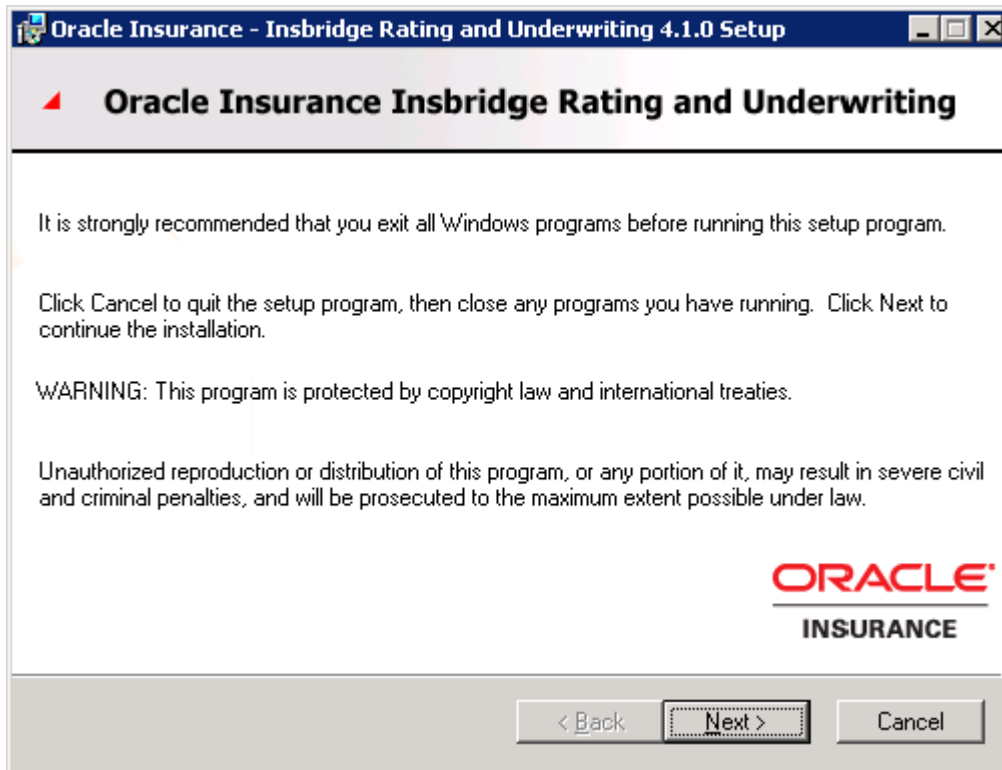


Figure 9 Installing Insbridge

3. Click **Next** to continue.

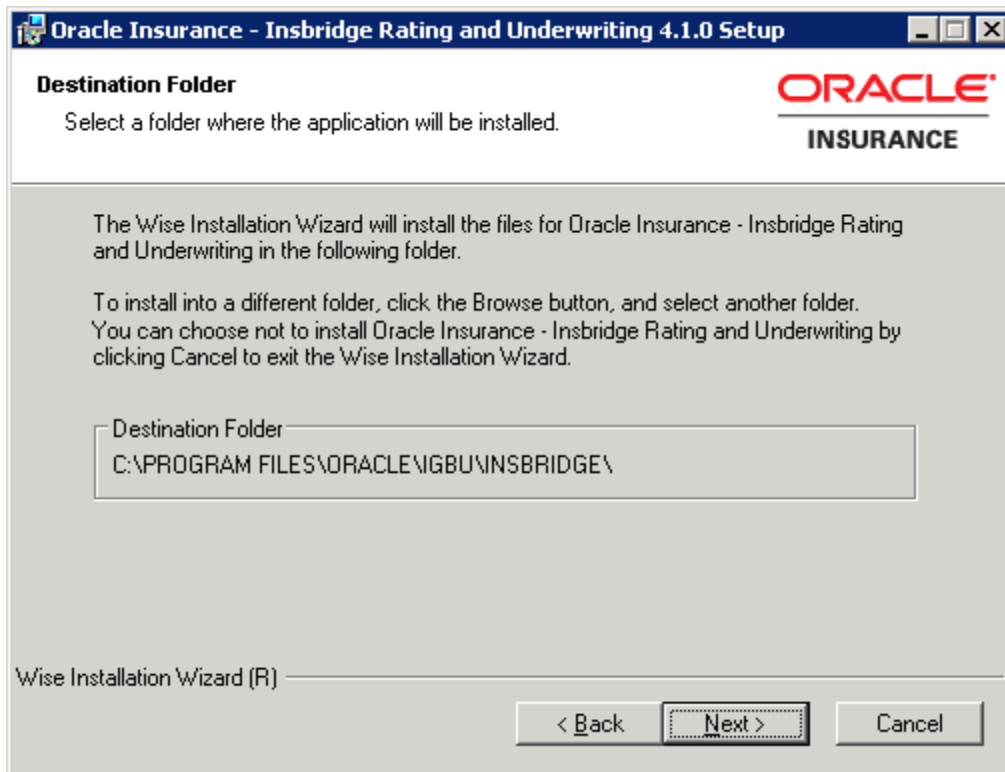


Figure 10 Entering the Destination Folder for Insbridge

4. Choose the location where the Insbridge installation will be located. This will be the location for all future installations for OIDC and Insbridge applications. Click **Next** to continue.

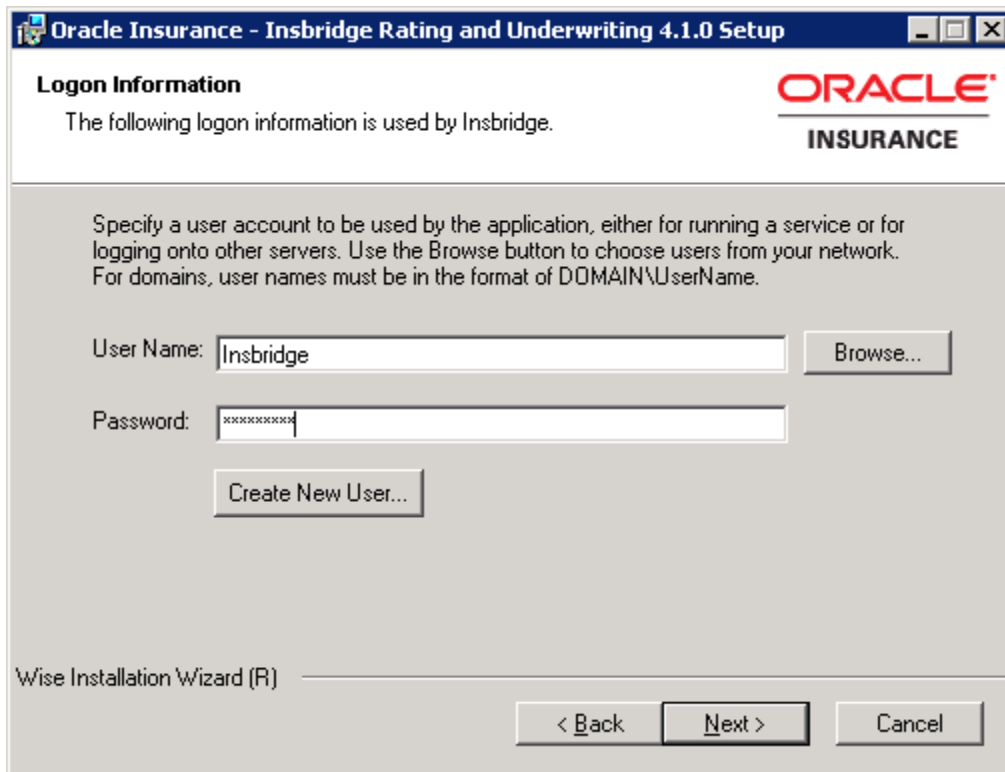


Figure 11 Logon Information

5. The logon information screen will be displayed. Enter a **User Name and Password** for a user with rights to the machine.

NOTE: You can use any user with admin rights to the machine or you can create a user specifically for this installation.

6. Click **Next** to continue.

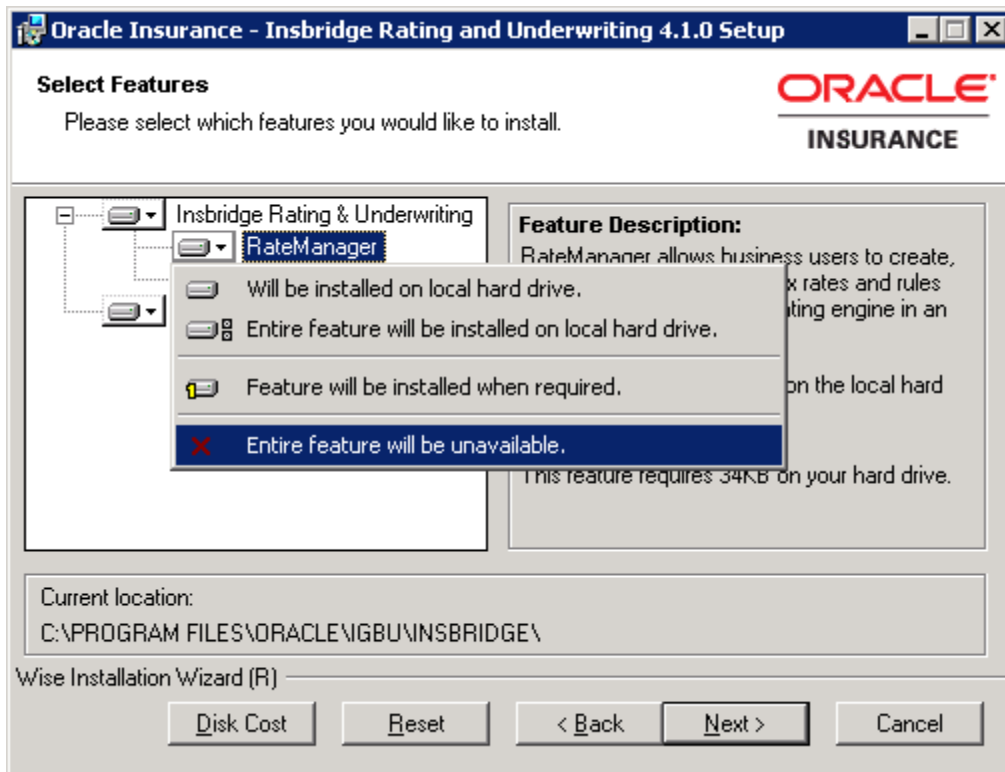


Figure 12 Selecting Features for Installation

7. The next screen will list the applications to be installed. To expand the options and view details, click on the downward arrow. All features are checked for installation. RateManager is the only one that you will be allowed to not install. Check **Entire feature will be unavailable**. Click **Next** to continue.

Options are:

- **Insbridge Rating and Underwriting:**
 - The default option is: Entire feature will be installed on local hard drive. This includes IBFA.
 - You will not be able to opt out of this selection.
- **RateManager:**
 - The default option is: Entire feature will be installed on local hard drive.
 - You will be able to opt out of this option. **Select Entire Feature will be unavailable.** RateManager will not be installed.
- **IBFA:**
 - The default option is: Entire feature will be installed on local hard drive.
 - You will not be able to opt out of this selection.
- **Oracle BI Publisher:**
 - The default option is: Entire feature will be installed on local hard drive.
 - You will not be able to opt out of this selection.
 - This option does **not** install the OBI Publisher. Only the templates required by the IBRU application will be installed on local hard drive.

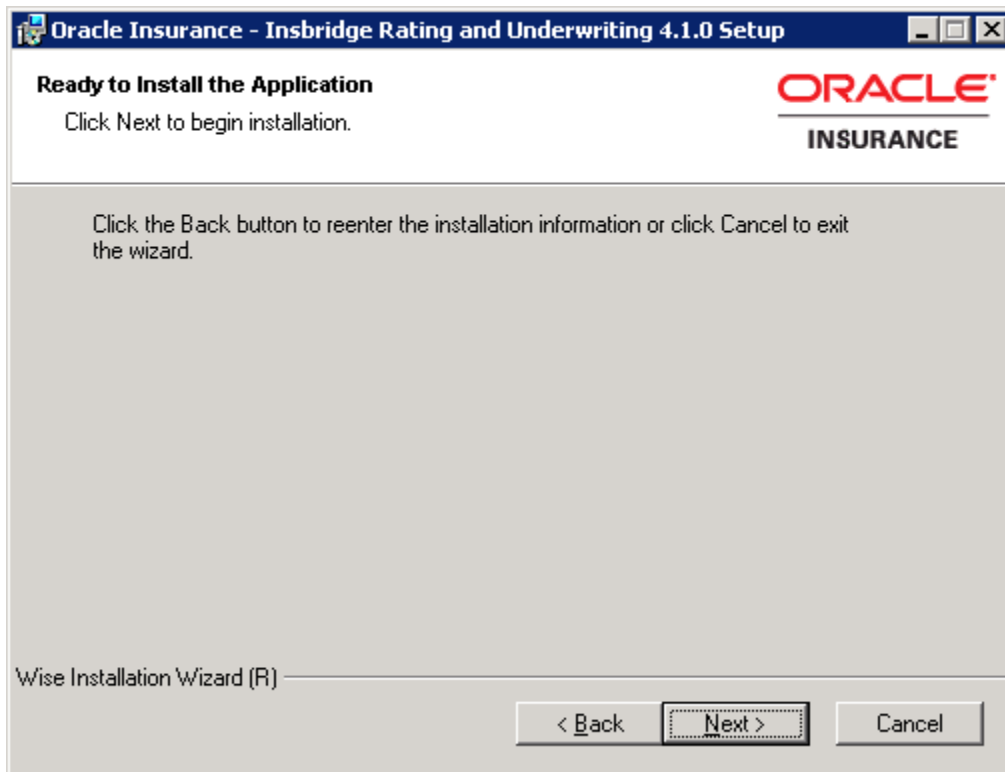
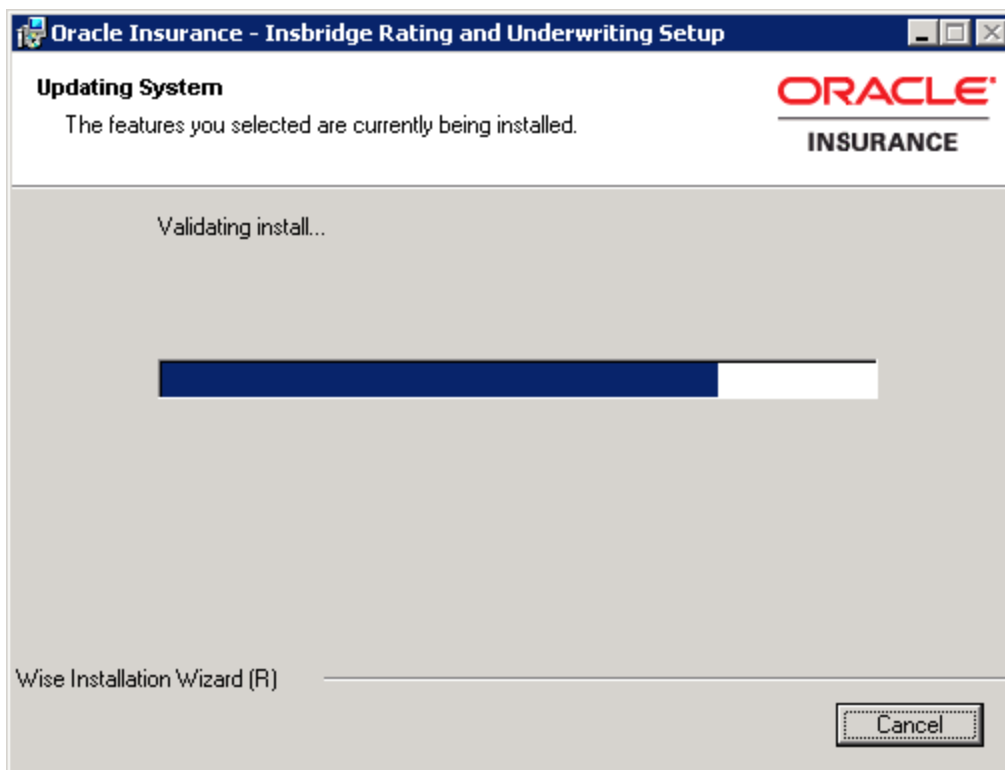


Figure 13 Ready to Install

8. A Ready to Install screen will be displayed. If you are ready, click **Next**. Otherwise click Back to check the options you want to install.



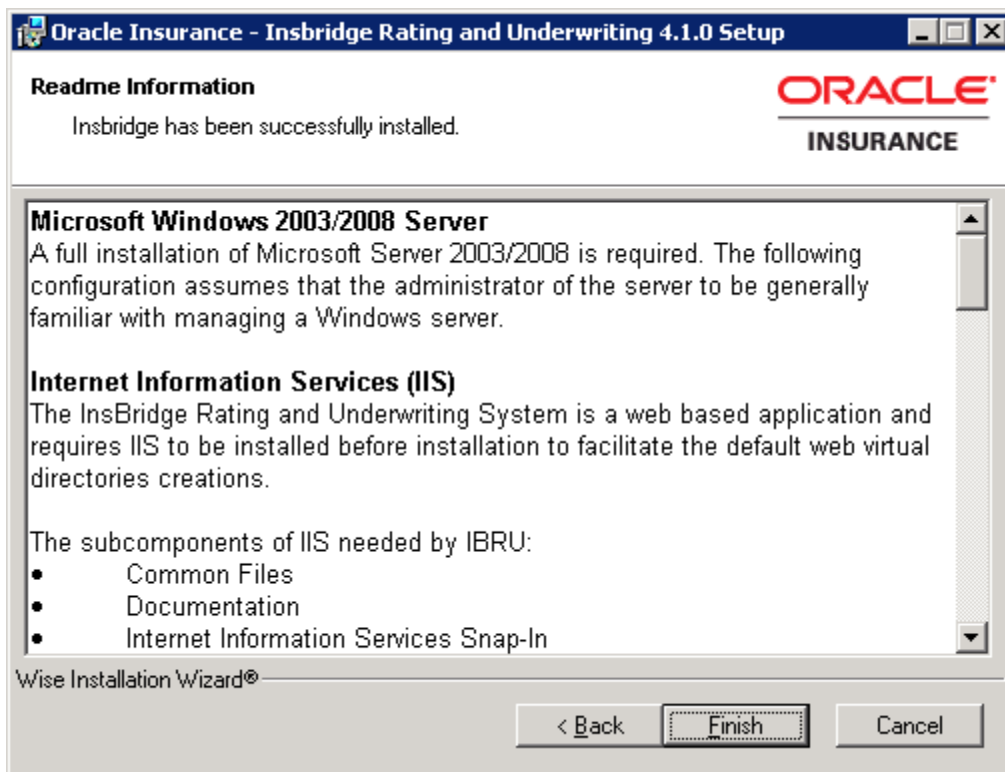


Figure 14 Install ReadMe Screen

9. Click **Finish** to finish the installation. The installation should complete successfully.

MICROSOFT SQL SERVER 2005

OIDC requires SQL Server 2005 SP3. Microsoft SQL Server can be installed on the same machine where OIDC resides, however for security and performance reasons, it is not recommended. If SQL Server resides on a separate host from the OIDC 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.

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.

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

- **Server Authentication** should be set to SQL Server and Windows Authentication mode.
- **Collation and Sort Order:** Currently supported are the default SQL Server collation and sort order plus case sensitivity using SQL_Latin1_General_CP1_CI_AS as the server collation. Check with Oracle Insurance for any questions regarding database server sort orders or collations.

NEW INSTALLATION

The download from E-Delivery has four files:

- OIDC_450_Database – Holds the databases and updates for the application.
- OIDC_450_Palette – Installs the Palette portion of the application.
- OIDC_450_Worksite – Installs the Worksite portion of the application.
- OIDC_450_Documentation – Contains the Installation Guide and Release Notes for the application.

The download files you receive will be zip files.

- For a new install, you will need the OIDC_450_Database.zip. This file contains the blank databases that will need to be restored. Unzip the OIDC_450_Database.zip on the machine where the database will be installed.
- Unzip the Worksite and Palette zip files on the machine where the application will be installed. These files will contain the executables that need to be run.
- Park the Worksite file in a location you can access.
- Park the Palette file in a location you can access.
- Unzip the documentation file to a machine where you can easily access it.

The installation must be performed in the following order:

- Make sure the Oracle Insurance Insbridge Framework Administrator (IBFA) is installed.
- Restore the Databases first. There are three databases that must be in place.
 - OIDC_Client – Holds the login and user information.
 - OIDC_System – Holds the contents and logic of questionnaires created in Palette.
 - OIDC_Logs – Logging is optional, but recommended. Oracle Support may request information from this database if you run into an issue with OIDC
- Install the Worksite application on the same server as IBFA.
- Install the Palette application on the same server as IBFA.
- Update the application pool.
- Log in to the Worksite application.
 - Create new user
 - Change sysadmin password

NOTE: *It is important to note that OIDC cannot be installed unless the Insbridge Framework Administrator is installed first.*

NOTE: *If you encounter any errors when running the database scripts, a message window will be displayed. Additional information will be in a log file that will be created only when script errors are present. This log file will contain the files that are by causing the error, listed by the creation date. These files will still be present after the application is uninstalled.*

RESTORE THE OIDC DATABASES

A New OIDC installation begins with the database restore. Unzip the OIDC_450_Database.zip on the machine where the database will be restored. The zip will contain:

- A Database Backups folder
- A DBUpdate folder
- An msi installer

Select the Database Backups folder. There will be three backup files located inside of the Database Backups folder:

- OIDC_450_BLANK_SQL2005_CLIENT.bak
- OIDC_450_BLANK_SQL2005_SYSTEM.bak
- OIDC_450_BLANK_SQL2005_LOG.bak

Park the backups in a location where you can access them.

You can leave the default names or change them to whatever name you want. It is not required but it is strongly suggested that the database file names be changed to something that defines the databases more accurately.

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.*

The database installer should have administrator rights on the machine where the database will be restored. SQL Server Management Studio must be installed.

1. Restore the OIDC_450_BLANK_SQL2005_CLIENT.bak database.
2. Restore the OIDC_450_BLANK_SQL2005_SYSTEM.bak database.
3. Restore the OIDC_450_BLANK_SQL2005_LOG.bak database.
4. Palette and Worksite can be installed once the databases are restored. The installation of Palette and Worksite will require:
 - Database server name or URL
 - Database name
 - Login
 - Password

NOTE: *The DBUpdate folder and the DBUpdaterInstall.msi file will not be needed for a new installation.*

OIDC WORKSITE INSTALLATION

Open the OIDC Worksite 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 setup.exe file located in the Worksite file on the same machine as the IBFA.

NOTE: *Worksite and Palette should be on the same machine as IBFA. Palette can be installed on a separate machine if necessary. Worksite must be on the same machine as IBFA. If Insbridge is not installed, OIDC will not be able to be installed.*

NOTE: *The default directory structure of a NEW OIDC installation will be:
C:\Program Files\Oracle\IGBU\DataCapture. Previous installs, including updates, may be located under the Insbridge\Webs folder.
A different default directory structure can be selected by the installer.*

A check of system requirements will be performed. Any missing component will result in an error message. For example, if the installation does not find .NET 4.0, a message will be displayed instructing you to install this prior to installing OIDC.

1. Please close all open applications and run the **setup.exe** in the Worksite file. If all requirements have been met, a Welcome screen will be displayed.

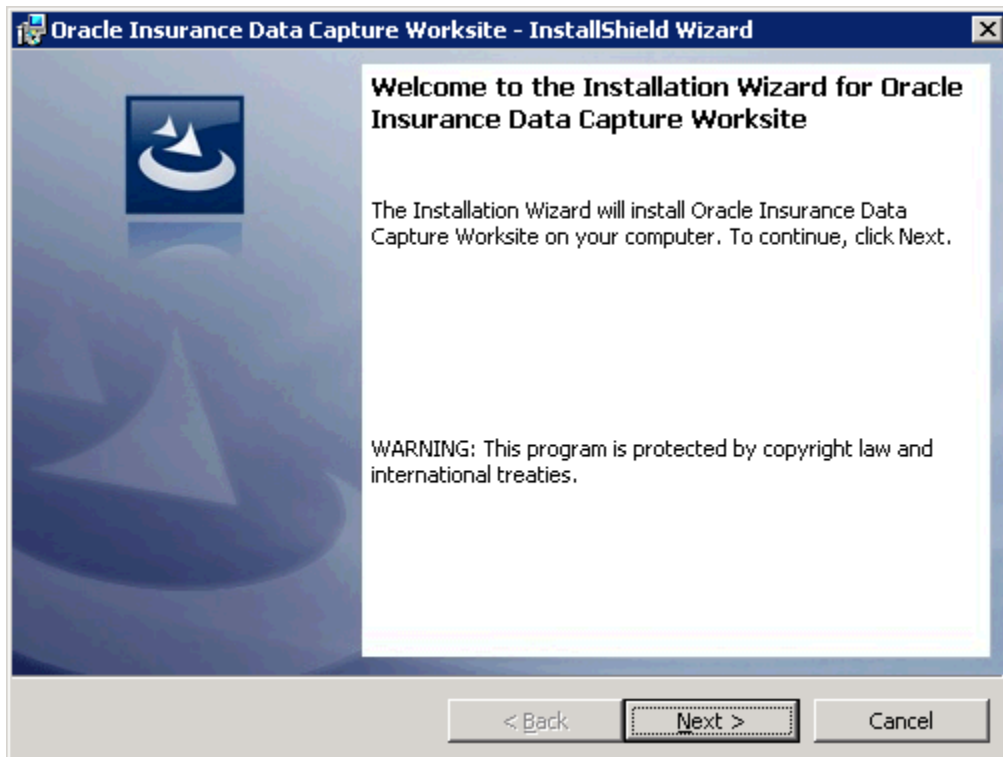


Figure 15 Welcome to Installing OIDC

2. Click on **Next** to continue.

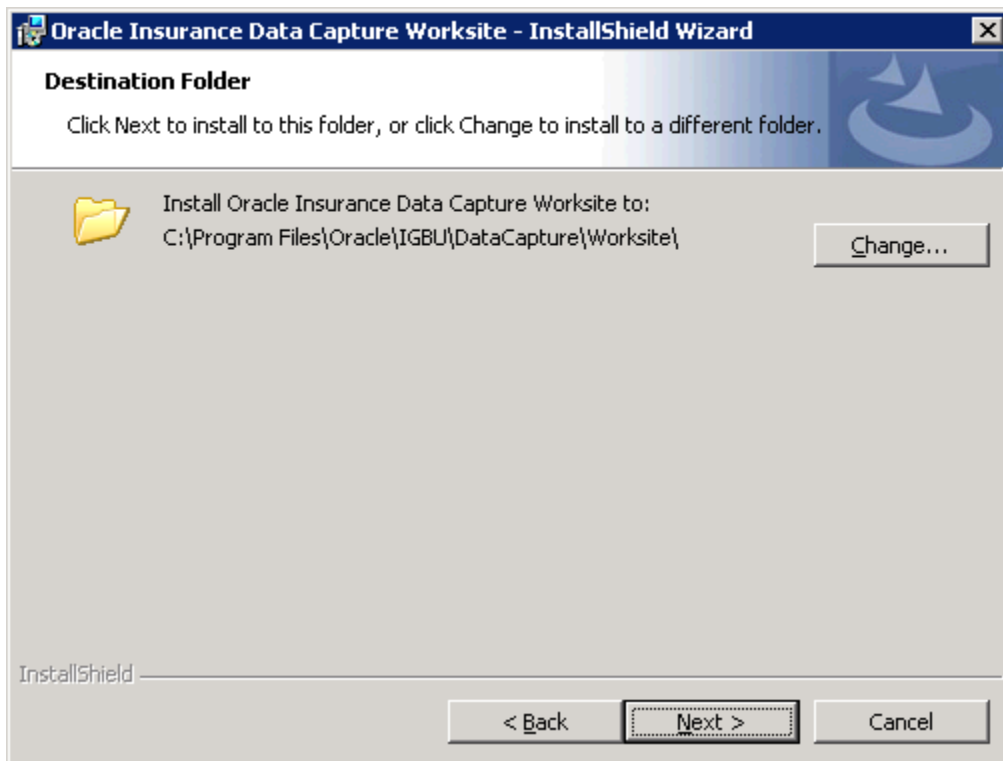


Figure 16 Selecting Installation Path

3. You have the option to select another installation directory. If you want another destination directory, browse for the directory you want to use. If the default installation directory is acceptable, Click **Next**.

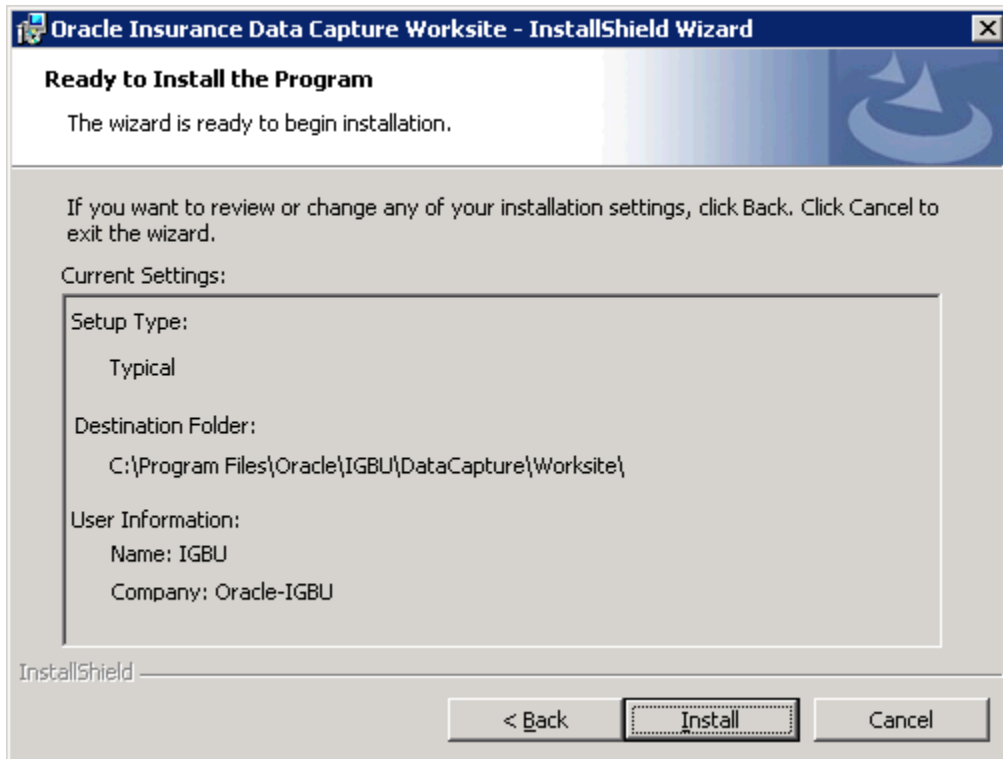


Figure 17 Ready to Install

4. An information screen will be presented. If the information is correct, click **Install**. A progress screen will be displayed.

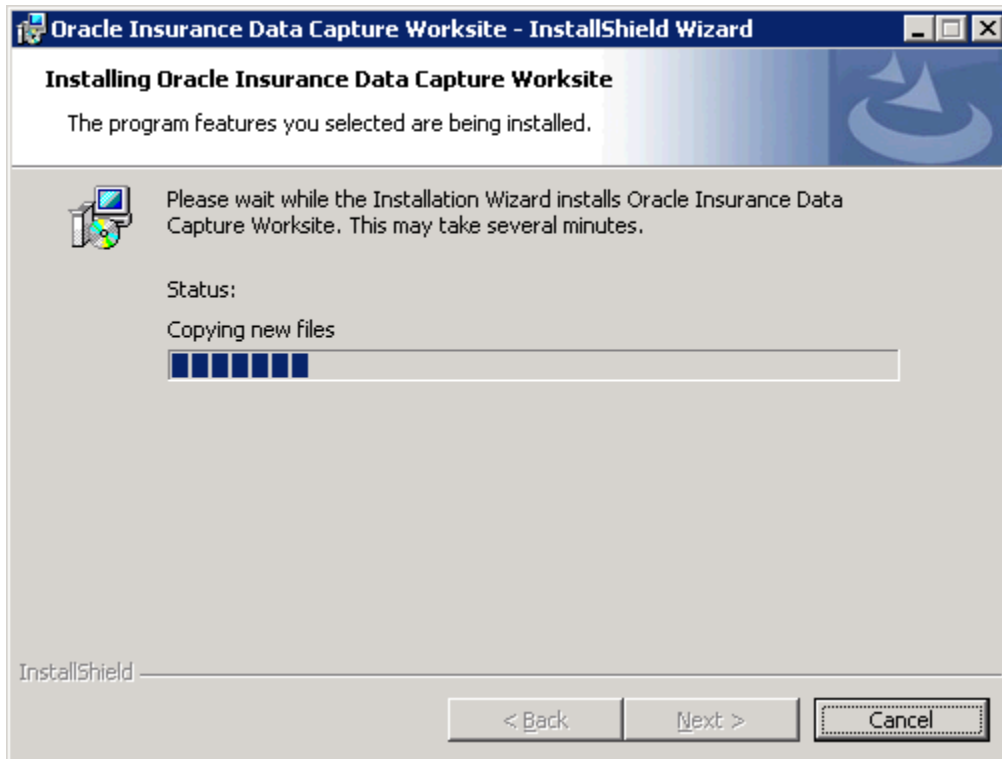


Figure 18 Worksite Installation Progress

If the information is not correct, click **Back** to return to the previous screen. Make your changes and then install when you are ready

5. Enter in the database information. There will be three sections; one for System one for Client and one for Logs. Please complete all three.

Database Settings

Enter Database connection information here. Please note: It may take a while for the connection tests to finish if the servers are not accessible.

System Database

Server: SQL Server
Name: SystemDB
User: sa
Password: Test Connection

Client Database

Server: SQL Server
Name: ClientDB
User: sa
Password: Test Connection

Log Database

Server: SQL Server
Name: LOGDB
User: sa
Password: Test Connection

Continue

Figure 19 Entering Database Information

NOTE: Database connection information is validated at this point. If there is a problem, you can correct it and then continue or you can continue without correcting. If you do not correct, you can enter the information manually. Please see *Manually Updating Web.Config File*.

6. When you are finished, click **Continue**.

7. When the installation is complete, click **Finish** to close the installer.

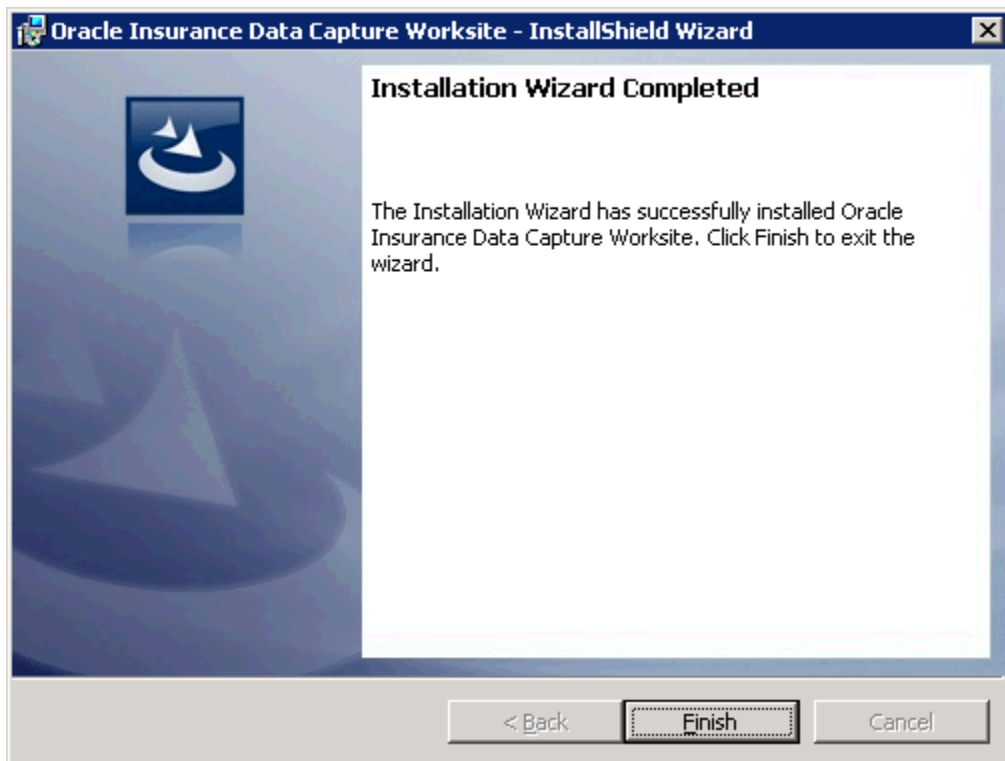


Figure 20 Completed Worksite Installation

OIDC PALETTE INSTALLATION

Open the OIDC Palette 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 setup.exe file located in the Palette file on the same machine as the IBFA.

NOTE: *Worksite and Palette should be on the same machine as IBFA. Palette can be installed on a separate machine if necessary. Worksite must be on the same machine as IBFA. If Insbridge is not installed, OIDC will not be able to be installed.*

NOTE: *The default directory structure of a NEW OIDC installation will be:
C:\Program Files\Oracle\IGBU\DataCapture. Previous installs, including updates, may be located under the Insbridge\Webs folder.
A different default directory structure can be selected by the installer.*

A check of system requirements will be performed. Any missing component will result in an error message. For example, if the installation does not find .NET 4.0, a message will be displayed instructing you to install this prior to installing OIDC.

1. Please close all open applications and run the **setup.exe** in the Palette file. If all requirements have been met, a Welcome screen will be displayed.



Figure 21 Welcome to Installing OIDC

2. Click on **Next** to continue.

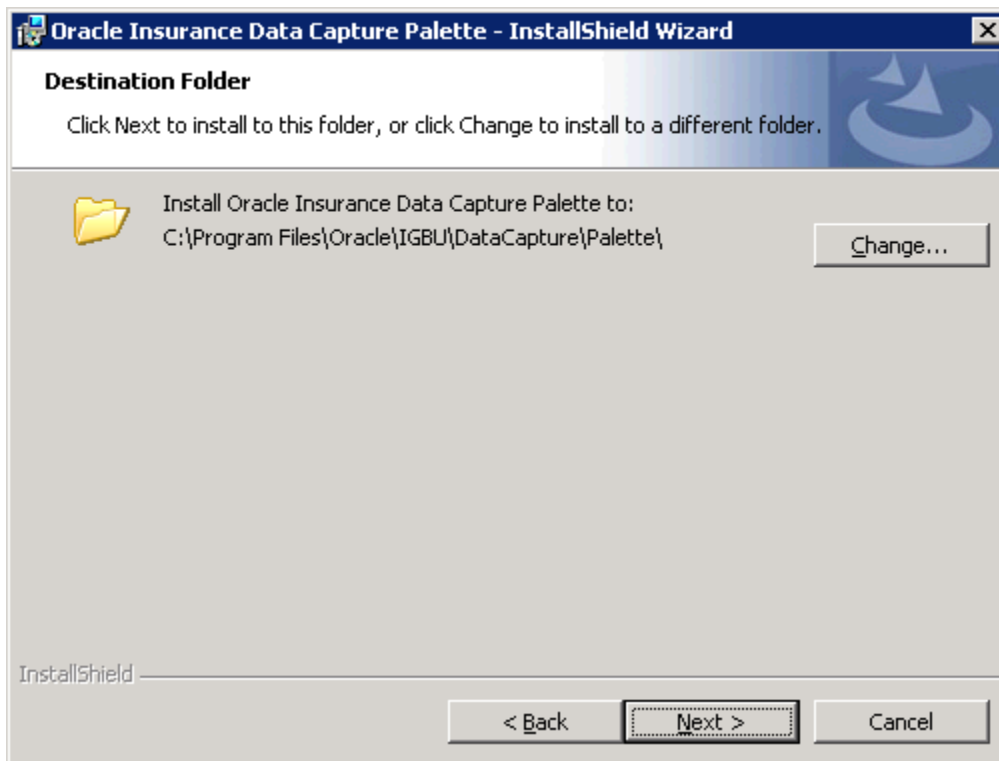


Figure 22 Selecting the Destination Folder

3. You have the option to select another installation directory. If you want another destination directory, browse for the directory you want to use. If the default installation directory is acceptable, Click **Next**.

4. An information screen will be presented. If the information is correct, click **Install**.

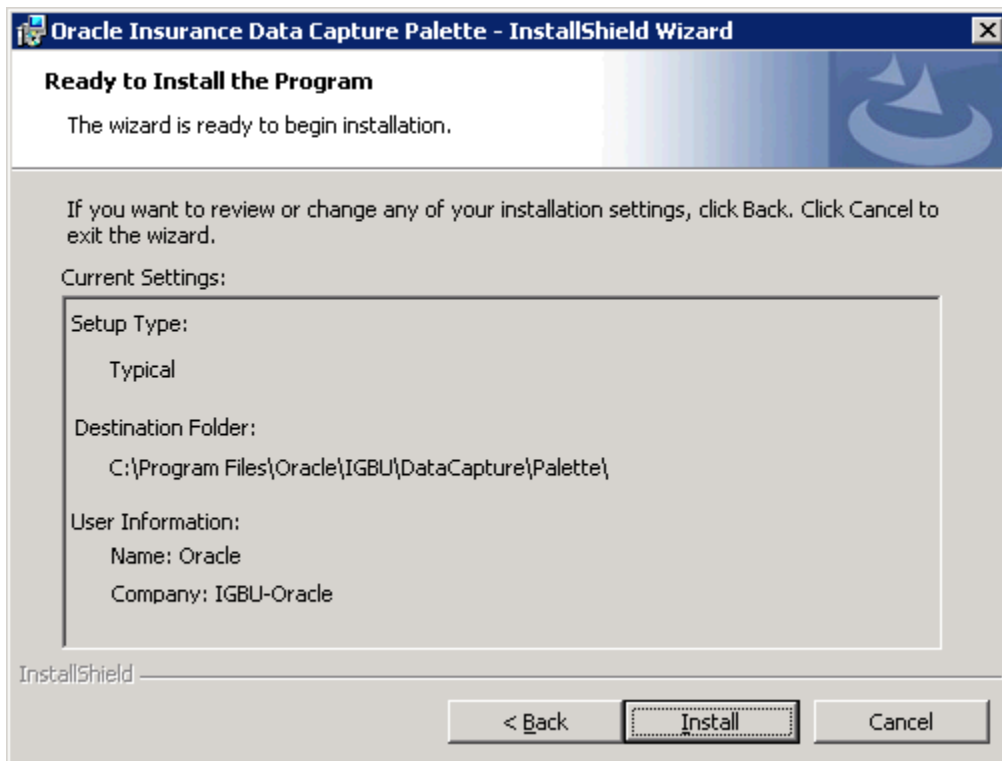


Figure 23 Ready to Install

If the information is not correct, click **Back** to return to the previous screen. Make your changes and then install when you are ready.

5. A progress screen will be displayed.

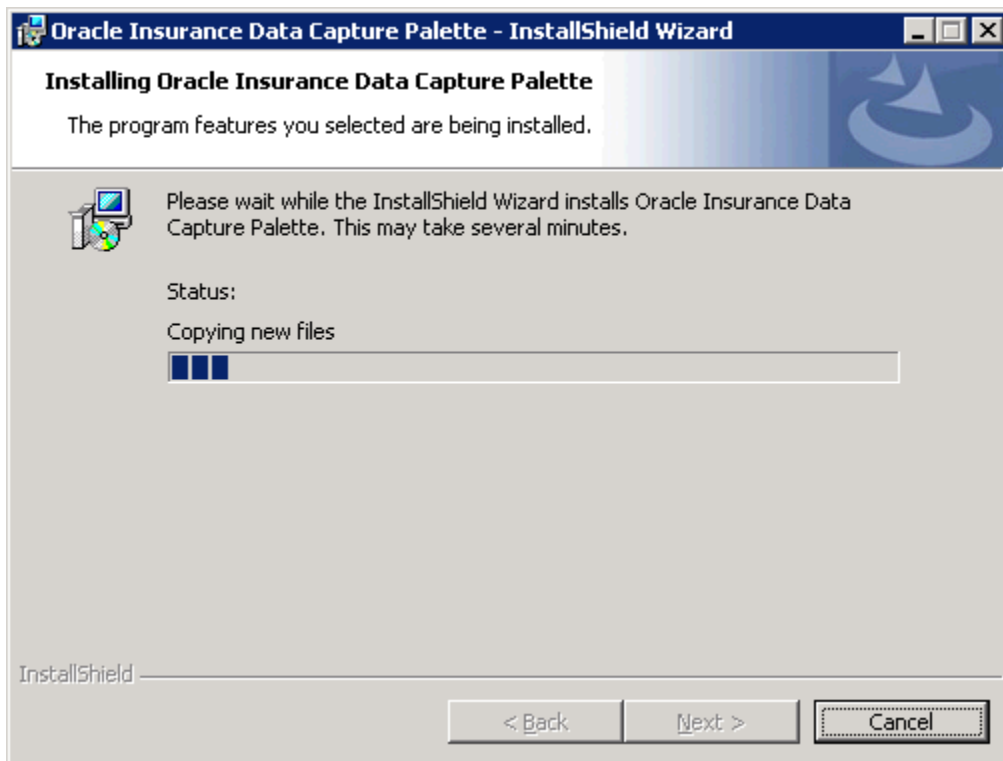


Figure 24 Worksite Installation Progress

6. Enter in the System database information.

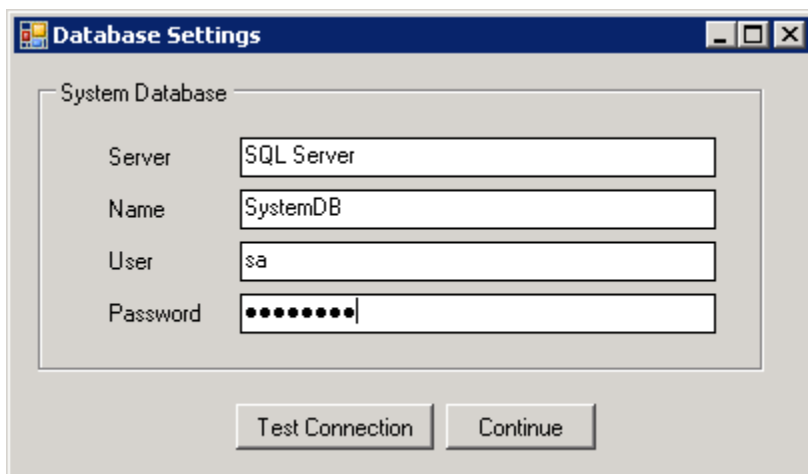


Figure 25 Entering Database Information

NOTE: Database connection information is validated at this point. If there is a problem, you can correct it and then continue or you can continue without correcting. If you do not correct, you can enter the information manually. Please see *Manually Updating Web.Config File*.

7. When you are finished, click **Continue**.

8. Click **Finish** to finish the install.

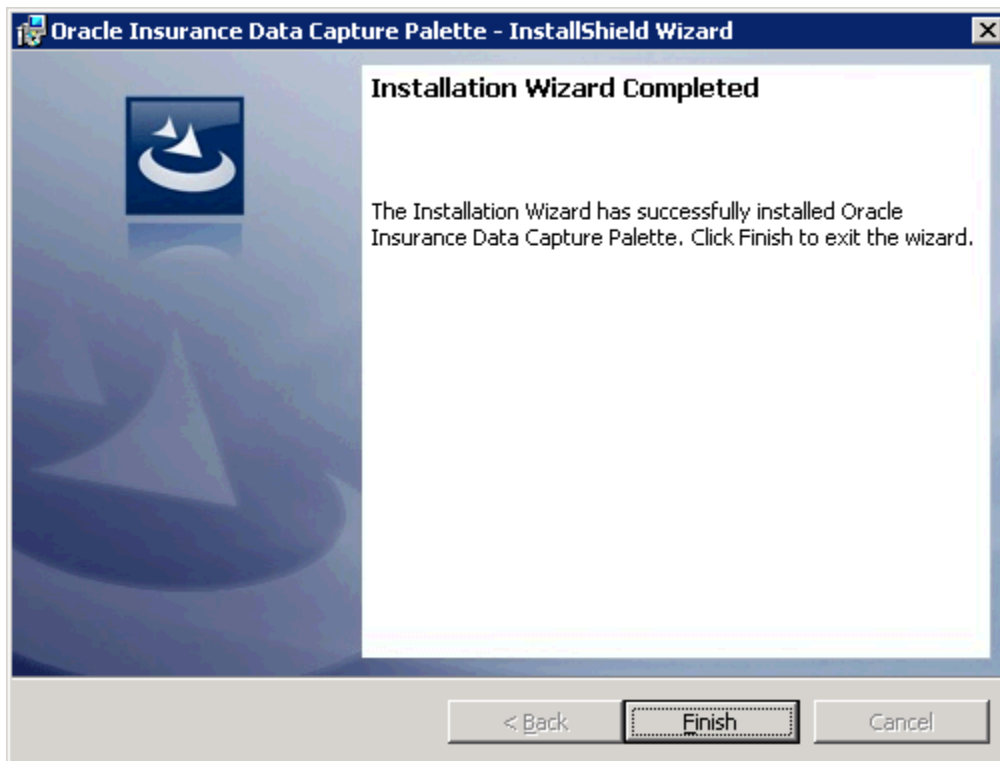


Figure 26 Completed Palette Install

SERVER CONFIGURATIONS FOR OIDC

An unstable session state may cause errors. To reduce the possibility of session state errors, you should create a separate OIDC application pool and then assign DCP45 and DCW45 to operate under this application pool.

To allow for quicker server response times you will need to enable compression.

Updating the OIDC Application Pool

The application pool should be created first.

1. Click **Start** → **Administrative Tools** → select **IIS Manager**.
2. Expand the **Local Computer** and select **Application Pools**. Right click and select **New** → **Application Pool**.

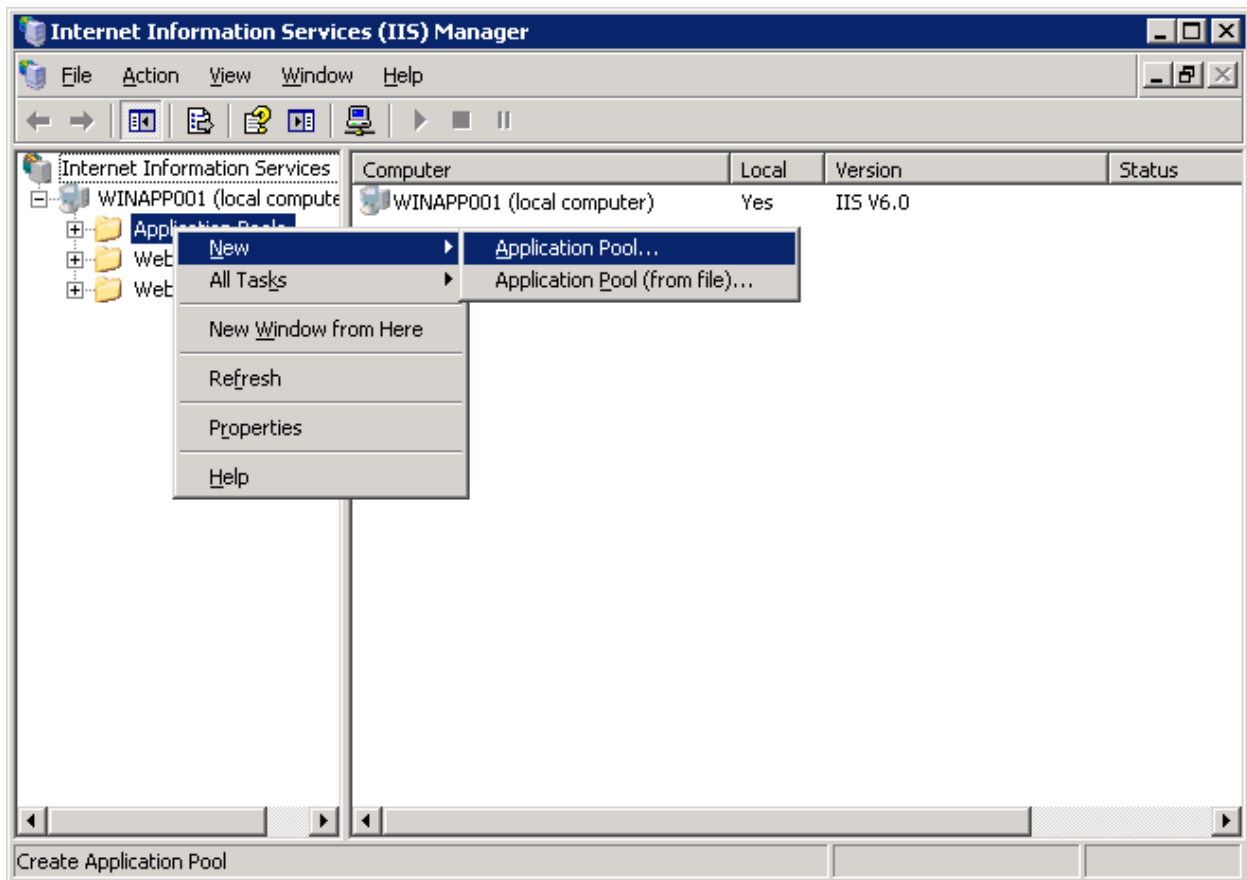


Figure 27 Navigating to Application Pool

3. Enter “**OIDC**” for the Application pool ID and click **OK**. You will be returned to the IIS screen. Your new application pool will be listed.

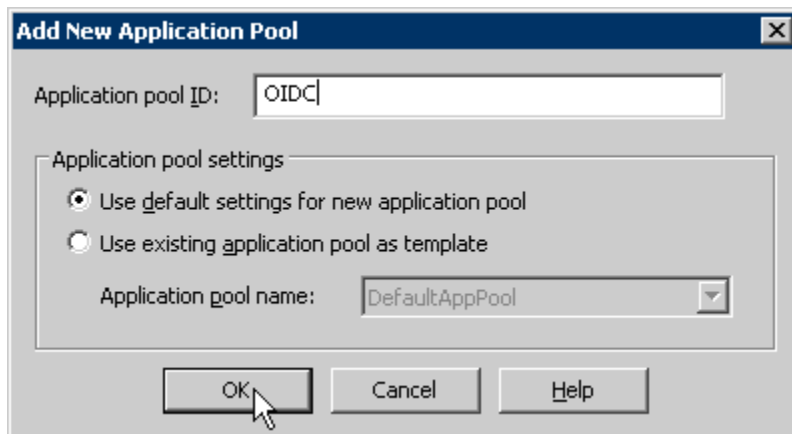


Figure 28 Creating a New Application Pool

4. Right click the OIDC Application Pool you created and select **Properties**.

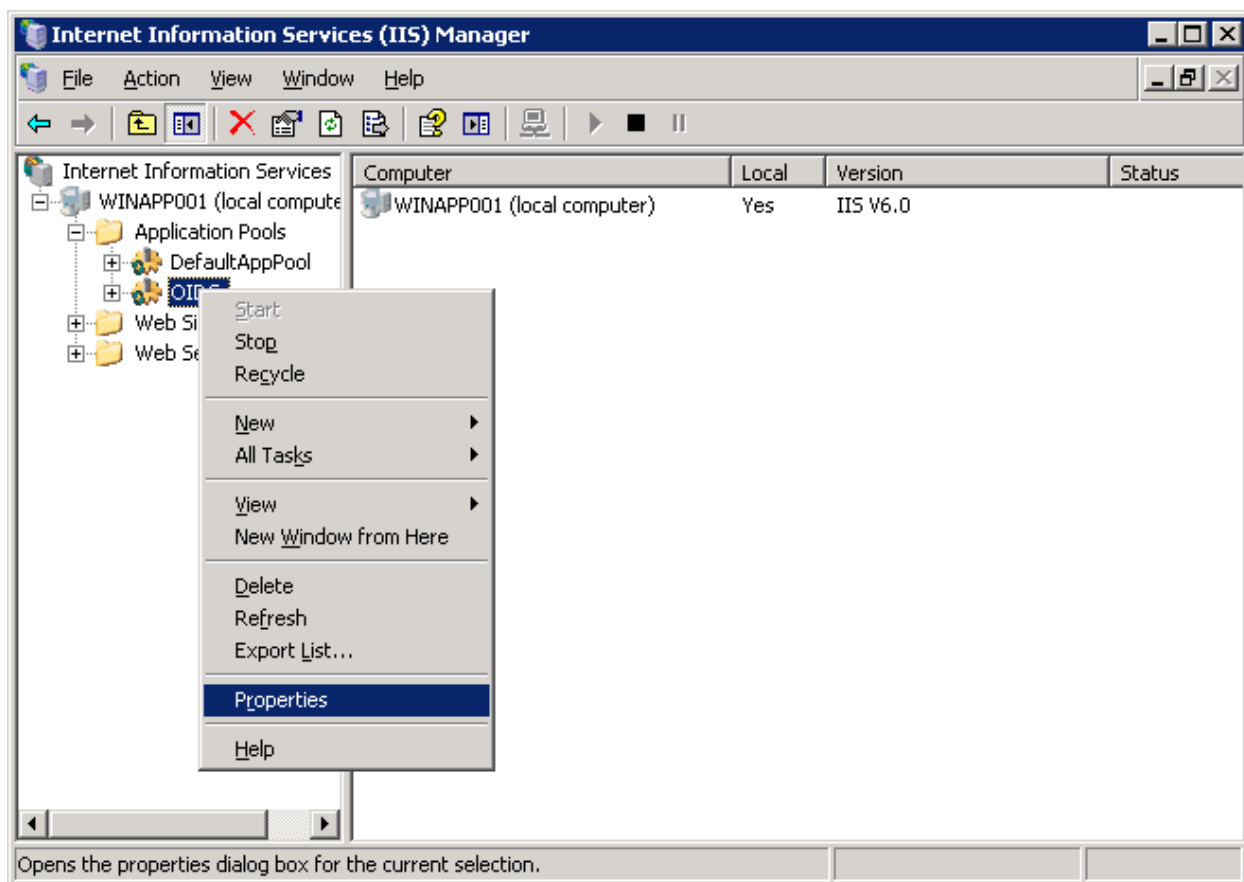


Figure 29 Selecting Application Pool Properties

5. Click the Performance tab and verify that **Idle Timeout** and **Request queue limit** are unchecked. Click **Apply**, and then **OK**. You will be returned to the IIS screen.

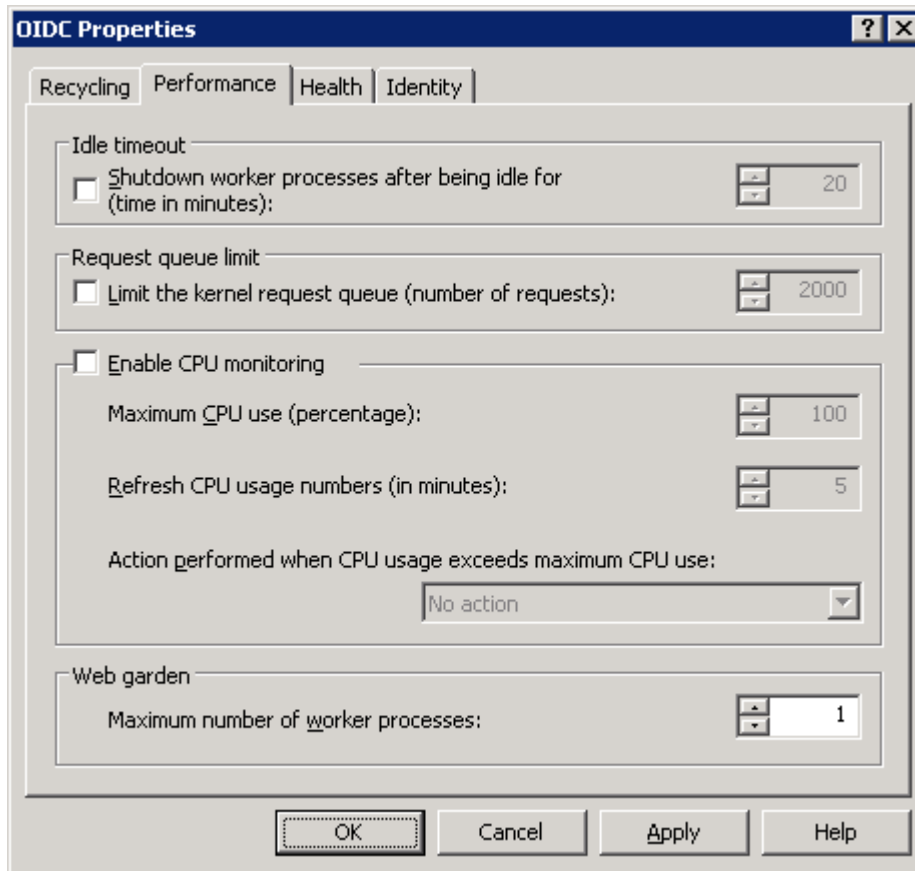


Figure 30 Setting Performance Options

After you have created the new Application Pool, you will need to assign Virtual Directories to it.

1. Stay in IIS Manager. Under **Local Server → Web Sites → Default Web Site**, select **DCP45**. Right click and select **Properties**.

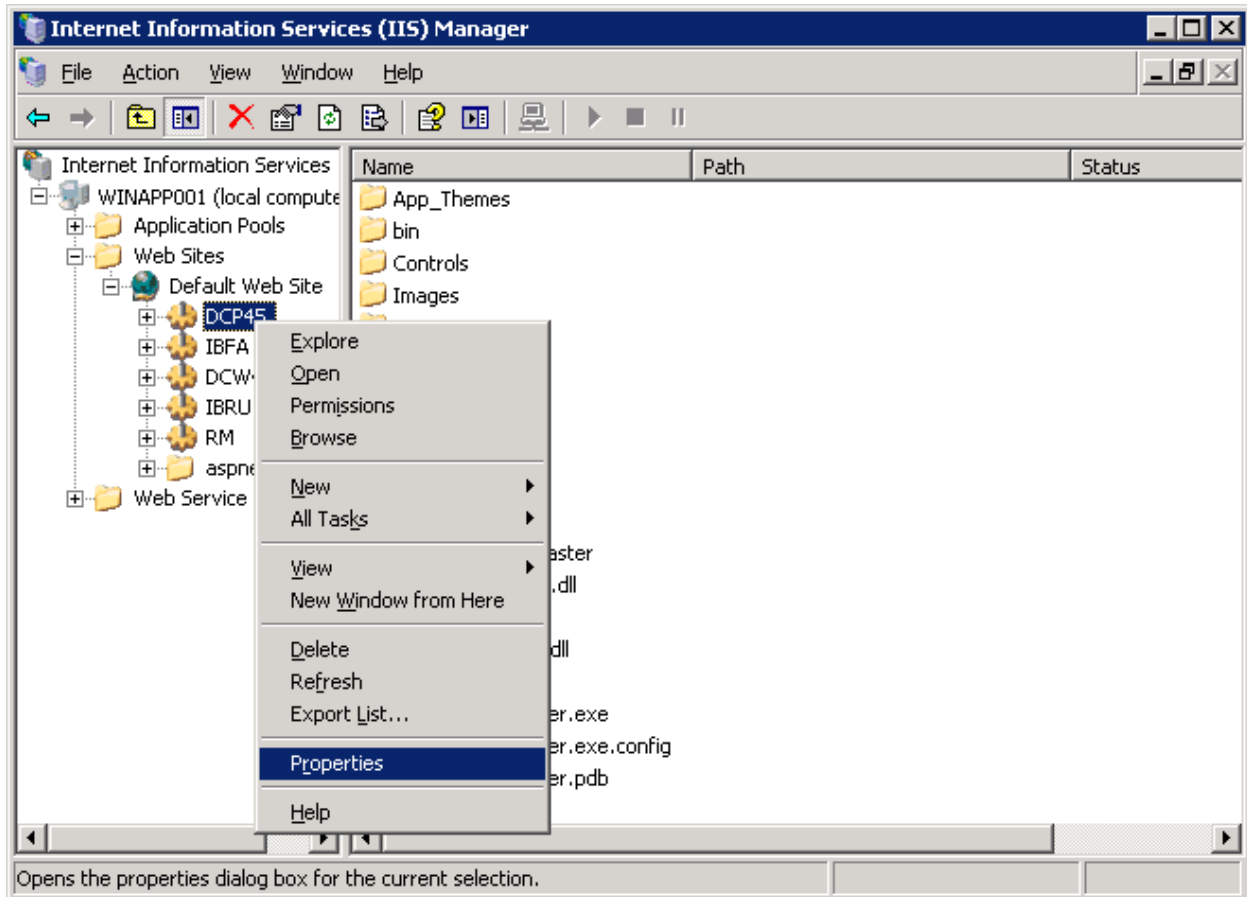


Figure 31 Selecting Virtual Directory Properties

A separate window will be displayed.

2. On the Virtual Directory tab, select the **OIDC Application Pool**.

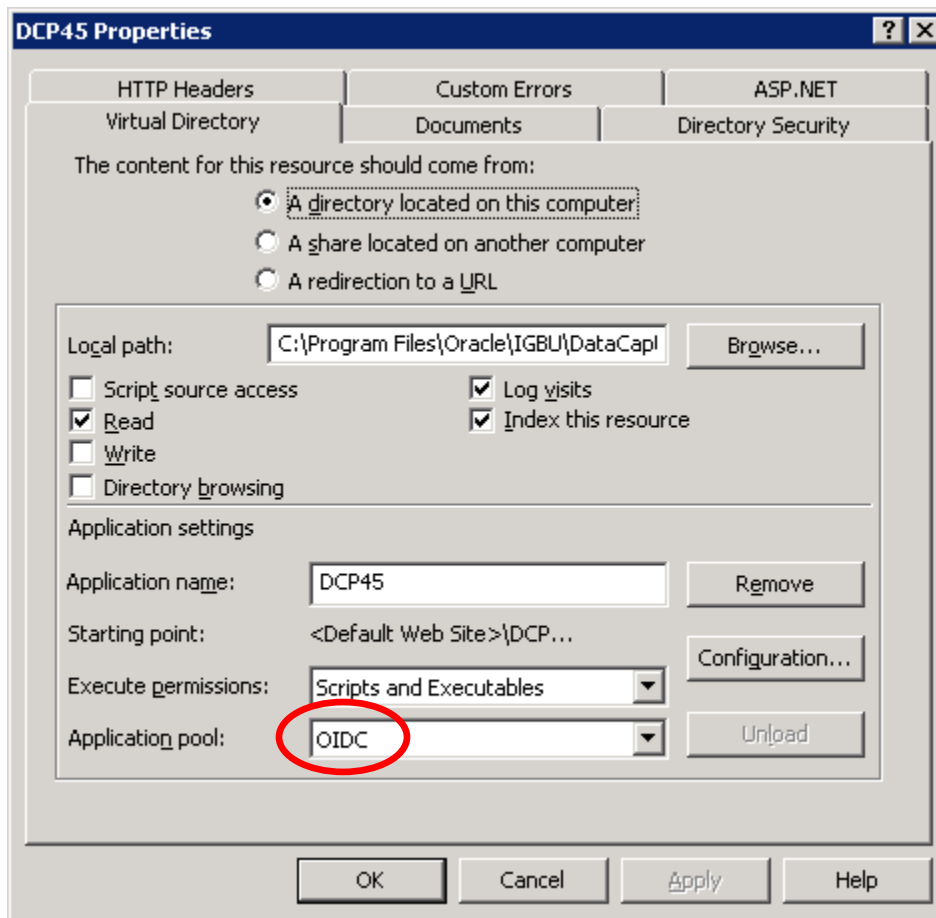


Figure 32 Selecting the OIDC Application Pool

3. On the Documentation tab, make sure that **default.aspx** is listed. It is recommended that you delete the other default content pages, but it is not required.

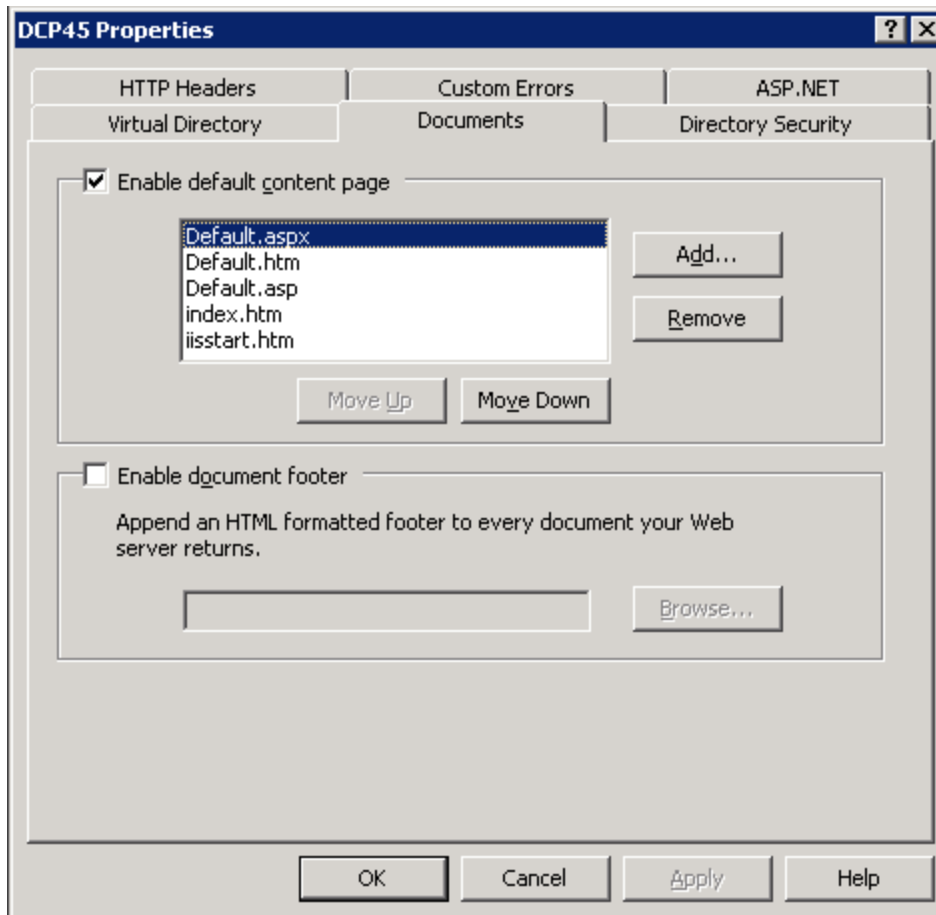


Figure 33 Setting the Default Content Page

4. On the Directory Security tab, click Edit to open the Authentication Methods. Verify that Enable anonymous access is checked.

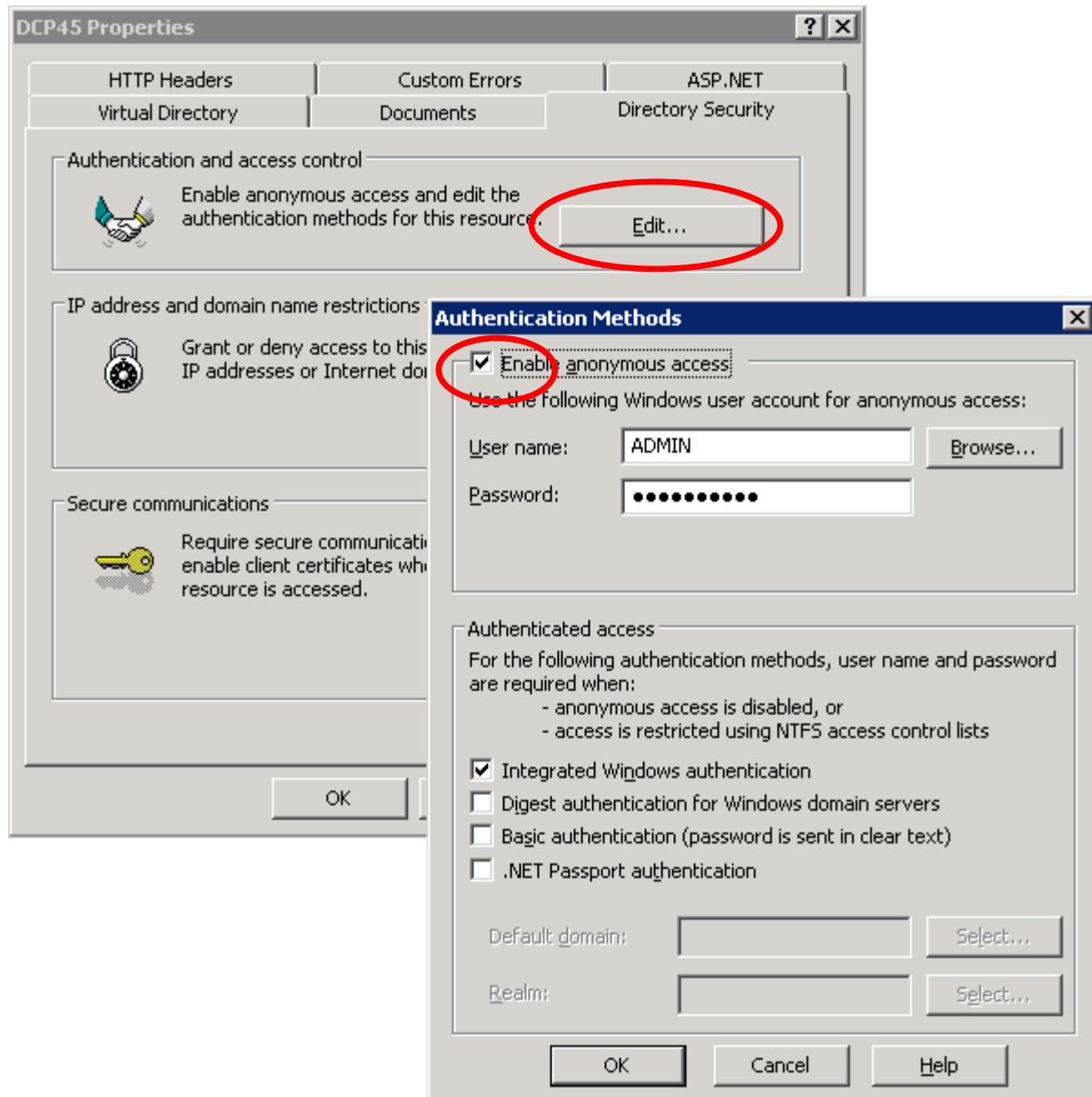


Figure 34 Verifying Anonymous Access

5. On the ASP.NET tab, select ASP 4.0.

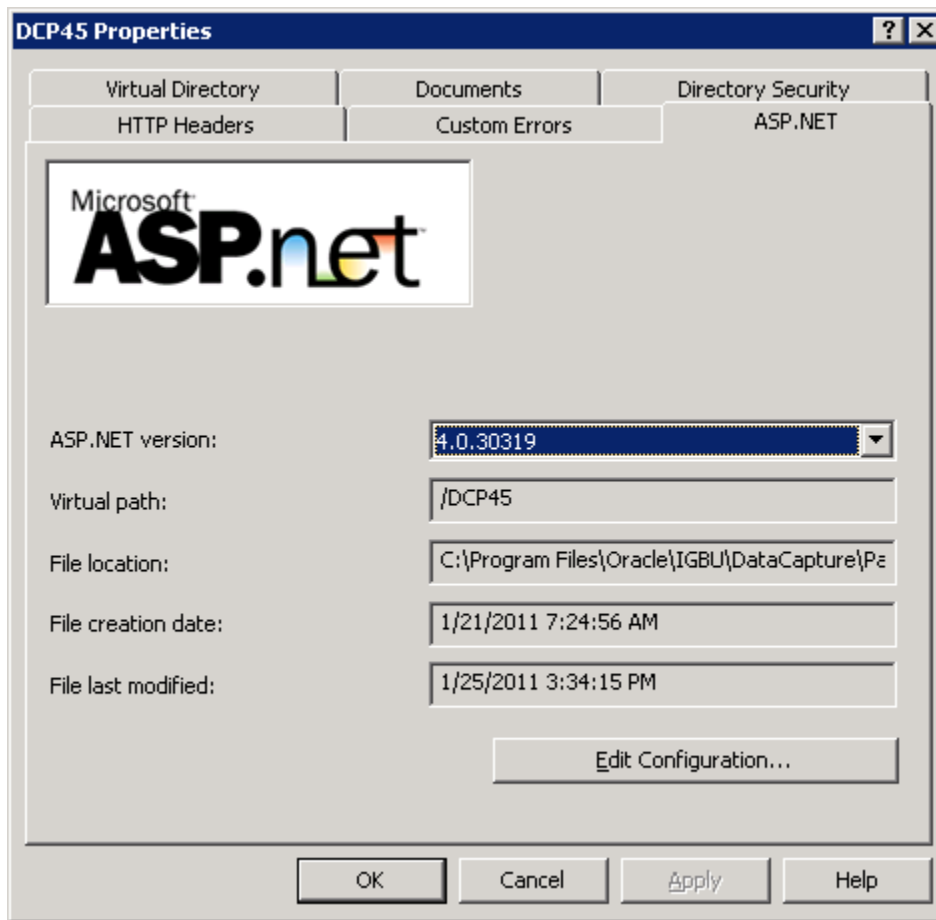


Figure 35 Selecting ASP.NET 4.0

6. Click **OK** to save your selections.

7. Apply the same application pool and setting to the **DCW45** Virtual Directory.
8. After both Virtual Directories have been assigned, open Internet Information Services (IIS) Manager in the administration tools.

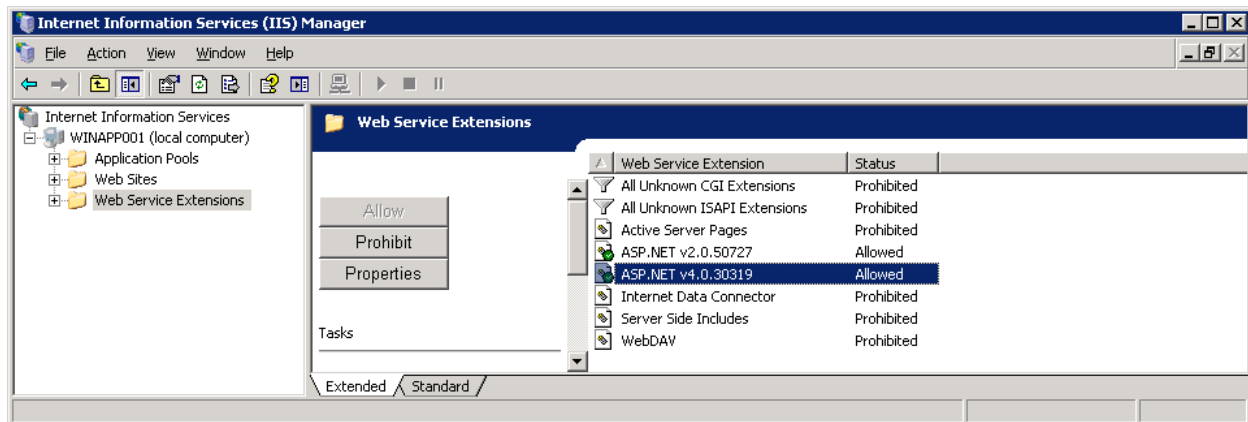


Figure 36 Allowing ASP.NET 4.0

9. Verify that **ASP.NET 4.0** is allowed.

Settings for Compression

The last item to update is compression settings.

The Virtual Directory should be deleted and re-created.

1. Click **Start** → **Administrative Tools** → select **IIS Manager**.
2. Expand the **Local Server** and select **Web Sites**.
3. Right click and select **Properties**.

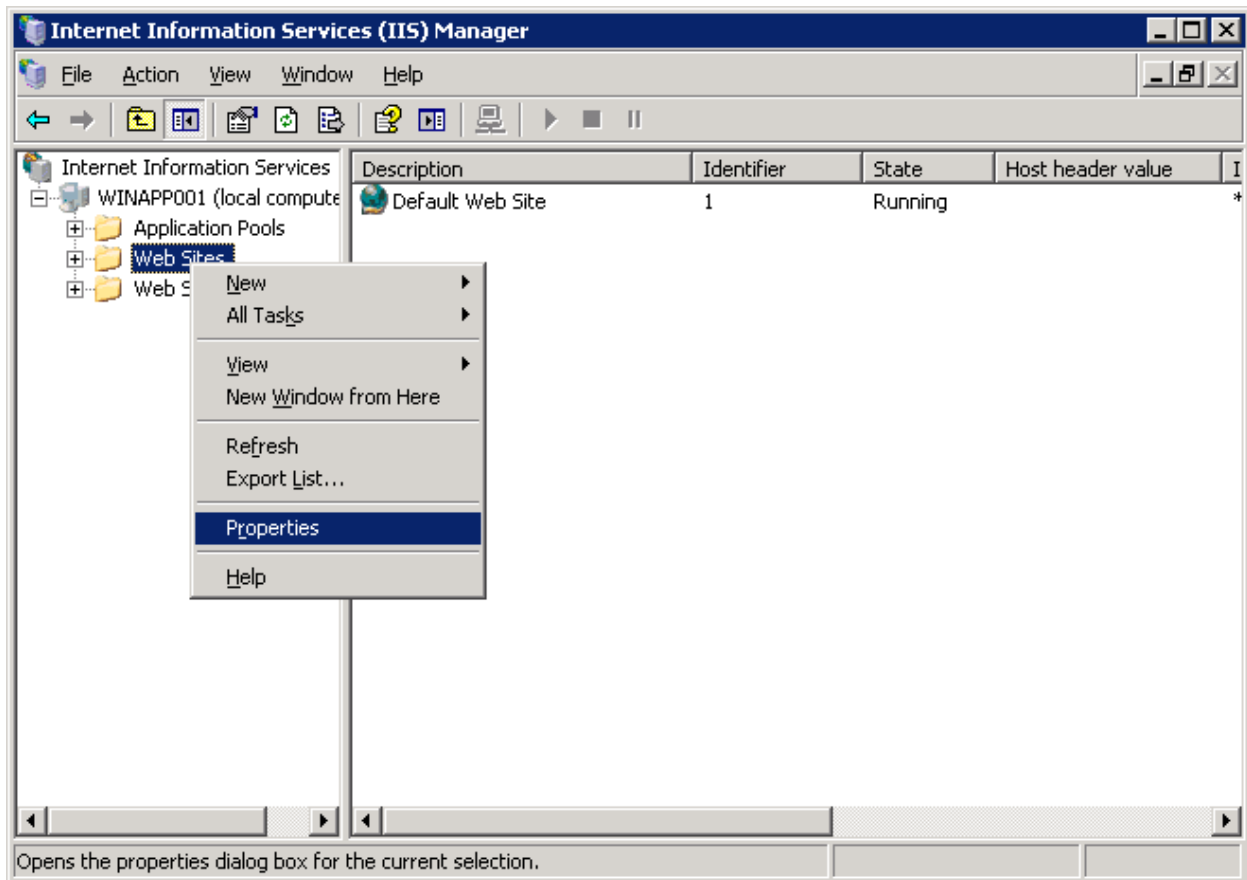
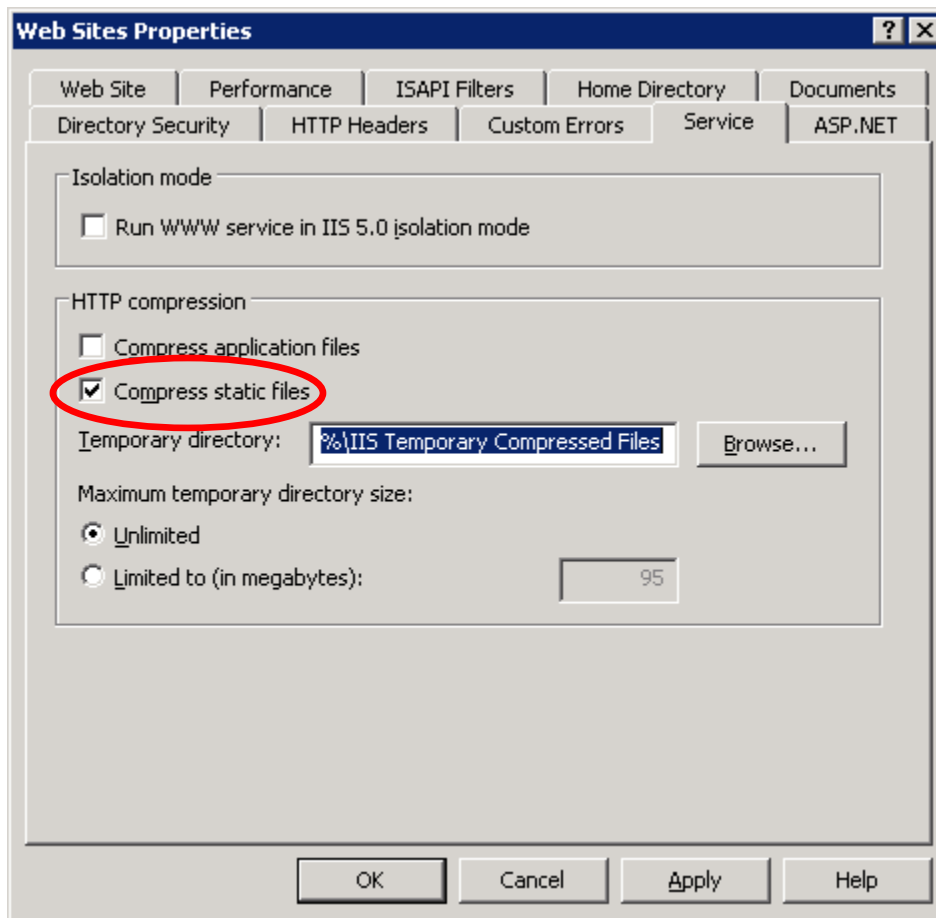


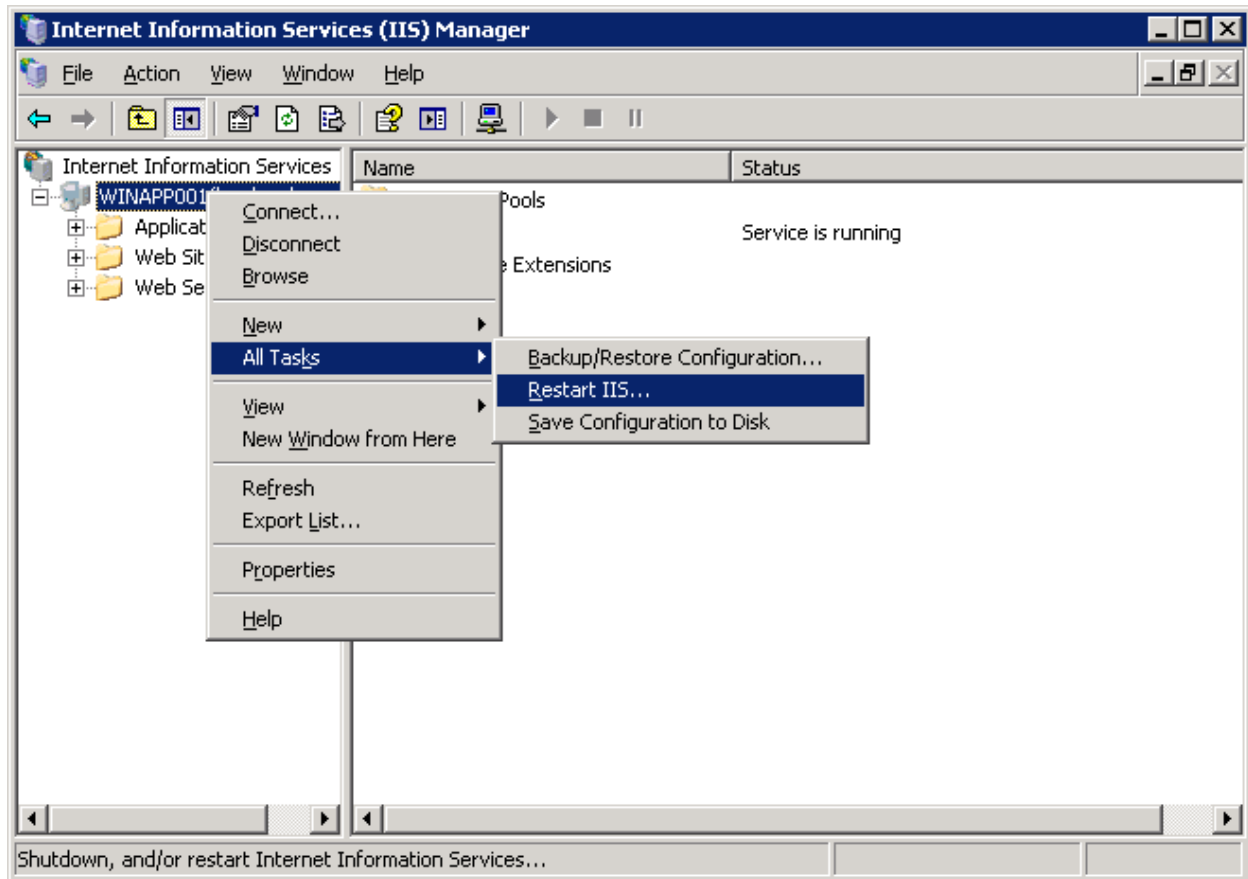
Figure 37 Selecting Properties

4. On the Properties screen. Select the **Service** tab.



5. Check **Compress static files**.
6. Click **Apply**.
7. Click **OK** to close the window.

8. After you have created an OIDC Application Pool, deleted and created virtual directories, and set compression, you should restart IIS. On the IIS screen, right click **All Tasks** → **Restart IIS**.



9. Click **OK** to restart.

MANUALLY UPDATING WEB.CONFIG FILE

You can manually update the connection string information in the web.config file. If you were able to complete the connection string information in the installation, you do not need to perform this step. If you are experiencing trouble with the application, you can manually check and update the connection string information.

NOTE: *It is strongly recommended that you make a copy of the current web.config file before you make any changes. In the event you need to do a rollback, you will have a working copy to restore.*

1. Once the databases have been restored, return to the server where Worksite and Palette were installed. Follow the local path to the location of Worksite. The local path will default to the initial installation path or a path selected by the installer. Two common paths are:

C:\Program Files\Oracle\IGBU\DataCapture\Engine

C:\Program Files\InsBridge\Webs\OIDC\iQuestionnaire (for older installations)

2. Open the **web.config** file in Notepad.
3. Go down to the **connectionStrings** section. You will have to manually enter in the connection string information. There are four fields in each of the four connection strings that must be completed.

The highlighted fields in the example below demonstrate where you will need to make an entry.

```
<connectionStrings>
  <add name="AgentRaterSystemDatabase" connectionString="Data
Source=WINAPP001;Initial Catalog=OIDC_SYSTEM;Persist Security Info=True;User
ID=sa;Password=Password;Enlist=False" providerName="System.Data.SqlClient" />
  <add name="AgentRaterClientDatabase" connectionString="Data
Source=WINAPP001;Initial Catalog=OIDC_CLIENT;Persist Security Info=True;User
ID=sa;Password=Password;Enlist=False" providerName="System.Data.SqlClient" />
  <add name="AgentRaterLoggingDatabase" connectionString="Data
Source=WINAPP001;Initial Catalog=OIDC_LOG;Persist Security Info=True;User
ID=sa;Password=Password;Enlist=False" providerName="System.Data.SqlClient" />
</connectionStrings>
```

- **Password** is the password for the database user.
- **UserID** is the user ID for the database. It is recommended that you use the sa login and password.
- **Catalog** is the name of the database. This name can be any name you chose.
- **DataSource** is the name or IP address of the server where the database is located.

4. **Save** your changes. No error message will be thrown for incorrect entries.

To test your entries, try accessing the application. If you cannot access the application, please re-check your entries.

Chapter 6

CONFIGURING OIDC

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

<http://SERVERNAME/DCW45/>

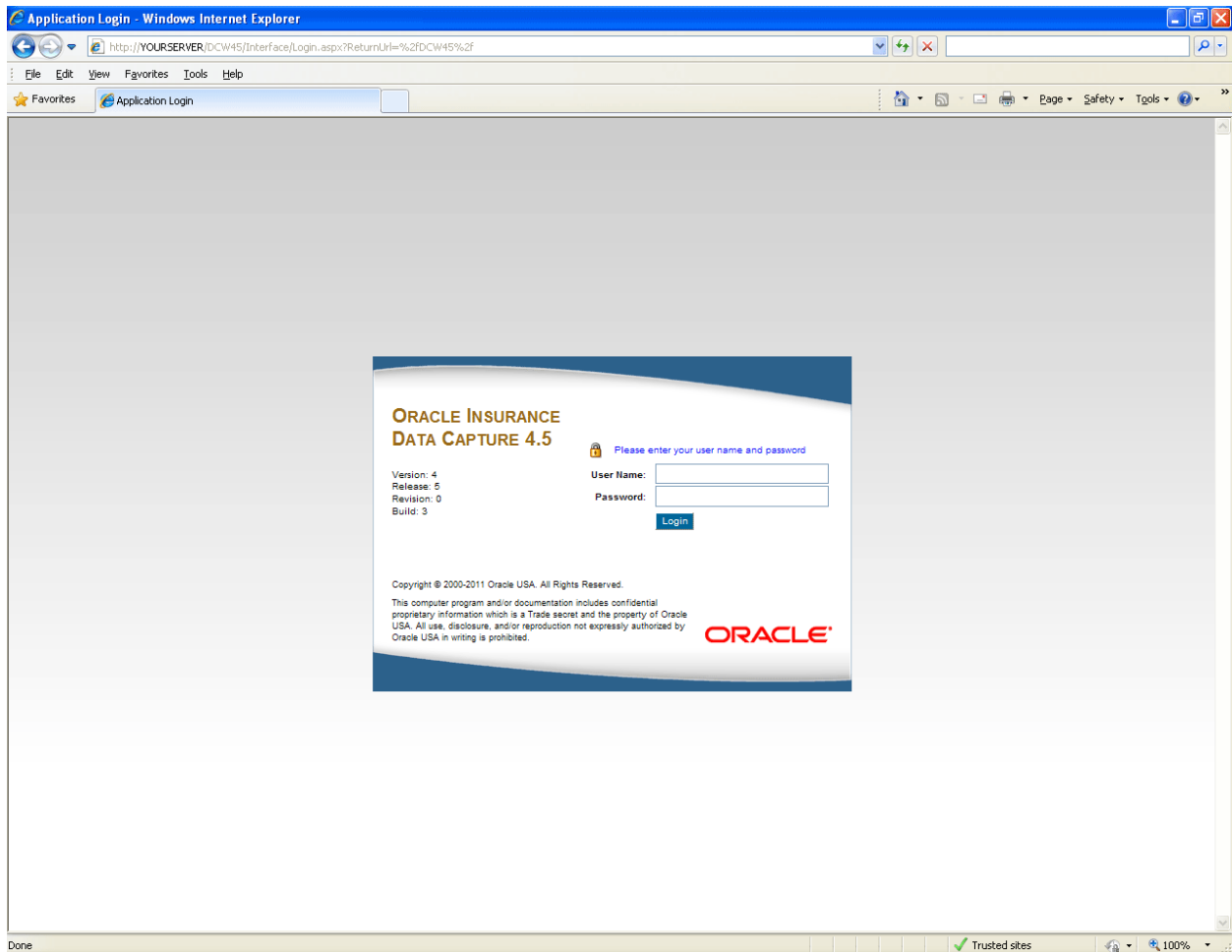


Figure 38 OIDC Home

Default user login is sysadmin with a password of password.

Oracle Insurance Data Capture 4.5 - Windows Internet Explorer

http://YOURSERVER:DCW45/Interface/AGENT_WORKBENCH/Application.aspx

File Edit View Favorites Tools Help

Oracle Insurance Data Capture 4.5

ORACLE Insurance Data Capture

Version: 04.05.00 Domain: System User: sysadmin log out

Workbench Customers Quotes Administration Security My Profile Help

Administration

Variables Rating Services Local IBFA Localhost: LOCAL01

General Settings

Subscriber (Extension) ID: Default

Line of Business: [dropdown]

Customer List View: ☒ Enable

Lead ID Prefix: IQ

Service Interfaces

IBFA Connector Interface URL: http://localhost/ibfa/connectors/sofrater.asmx

Rating Environment

Environment Name: [text box]

Fulfillment Queue: FormatName:DIR=C:\OS\SMU\private\ungage

Rate Request Queue: .private\$\insbridge-broker request queue

Rate Response Queue: .private\$\insbridge-broker response queue

Database Connections

System DB Server Name: YOURSEVERSQL

System DB Database Name: ODC_450_SYSTEM

System DB User Name: sa

System DB Password (Leave blank if not changing connection): [text box]

Client DB Server Name: YOURSEVERSQL

Client DB Database Name: ODC_450_CLIENT

Client DB User Name: sa

Client DB Password (Leave blank if not changing connection): [text box]

Web Directories

Agent Interface Root Directory: /DCE45

InsBridge WebApp Base Directory: /WebBase/IBWebBase/v1.0

QuoteTools WebApp Base Directory: /WebBase/QuoteToolsWebBase

Refresh Search Data Apply Cancel

Figure 39 OIDC Admin

After you enter the application, click the Administration link.

Verify that the information on the Administration page is the correct information. If not, please make any adjustments and click **Apply**.

Updating SysAdmin Password

To update the SysAdmin password, click on the **My Profile** link. The SysAdmin information will be displayed. Update your password and Save.

Please change the default sysadmin password or go to security and create your own user login and password.

UPGRADE INSTALLATION

To update an existing OIDC application you will need these files from E-Delivery:

- **OIDC_450_Database.zip**. The zip file will contain:
 - Database Backups folder
 - DBUpdate folder
 - DBUpdaterInstall.msi
- **OIDC_450_Palette.zip**
- **OIDC_450_Worksite.zip**

Upgrading to 4.5 from 4.2, 4.3, or 4.4

The first step when updating the OIDC application is to remove the previous database updater using the Add/Remove programs. Then run the database updates. The database installation program requires the installer have administrator rights on the machine where the databases are located. SQL Server Management Studio must also be installed.

NOTE: *It is recommended that you make a copy of the current databases before you make any changes. In the event you need to do a rollback, you will have a working copy to restore.*

1. On the server where OIDC is installed, **Start → Control Panel → Add or Remove Programs**.
2. Locate the **OIDC DBUpdater** and remove the program. If you want, you can delete the previous updater file out of Program Files. The location will be the initial installation path, for example C:\Program Files\Oracle\OIDC DBUpdater.
3. Make a backup copy of the web.config from the server where Questionnaire (Or Engine) and Designer (Or Palette) originally were installed. Follow the local path to the location of Questionnaire (Or Engine). The local path will default to the initial installation path or a path selected by the installer. Some common paths are:

C:\Program Files\Oracle\IGBU\DataCapture\Engine

C:\Program Files\Oracle\IGBU\DataCapture\Questionnaire

C:\Program Files\InsBridge\Webs\OIDC\iQuestionnaire

This file will need to be restored at the end of the upgrade.

4. Prior to running the database updates, please have the following information ready:
 - Database server name or URL
 - Database name
 - Login
 - Password
5. Unzip the OIDC_450_Database.zip on the machine where the database will be restored. The zip will contain:

- A Database Backups folder
- A DBUpdate folder
- An DBUpdaterInstall.msi

Select the DBUpdate folder and the msi installer. In the DBUpdate folder, there will be three backup folders and a separate SQL script.

- ClientDB
- LogDB
- SystemDB
- PopulateQuestionnaireID.sql

The Database Backups folder will not be needed for an upgrade.

6. Place the DBUpdate folder to a location that you can access. This file will be used to update the databases on the SQL Server machine. Make note of the location. You will need this information later on.
7. Run the DBUpdaterInstall.msi. It is recommended that you run this installation on the same machine as OIDC however, you can run this installation on any machine.

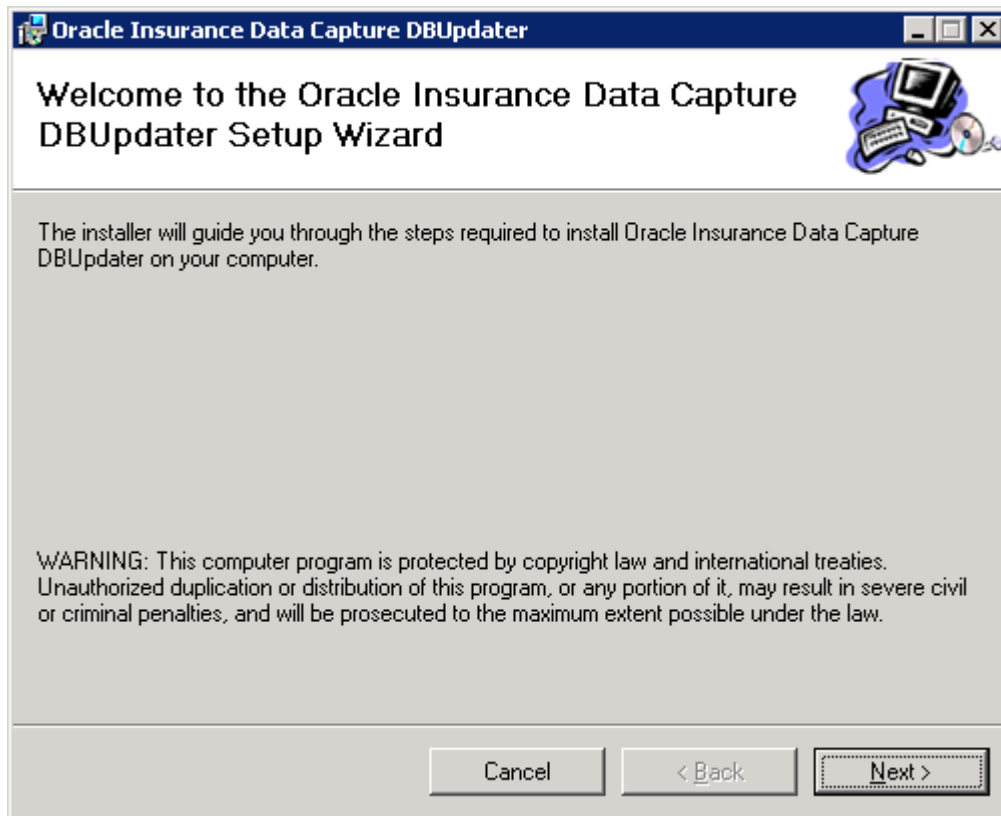


Figure 40 Database Welcome

5. Click **Next** to continue.

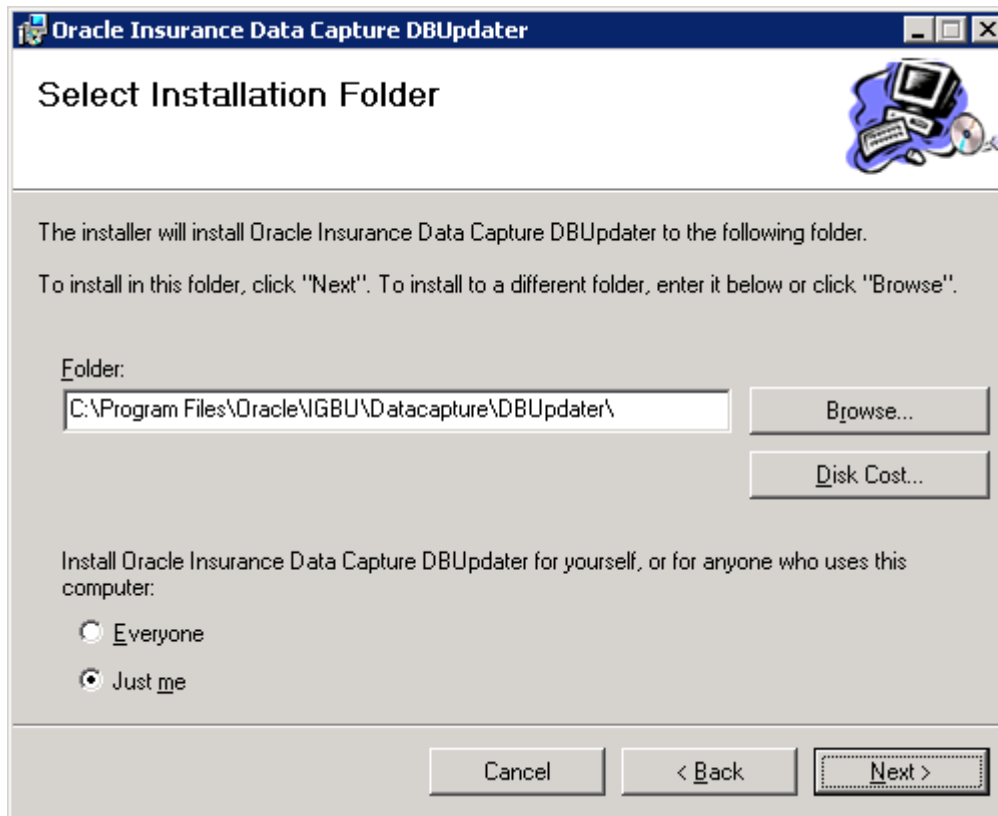
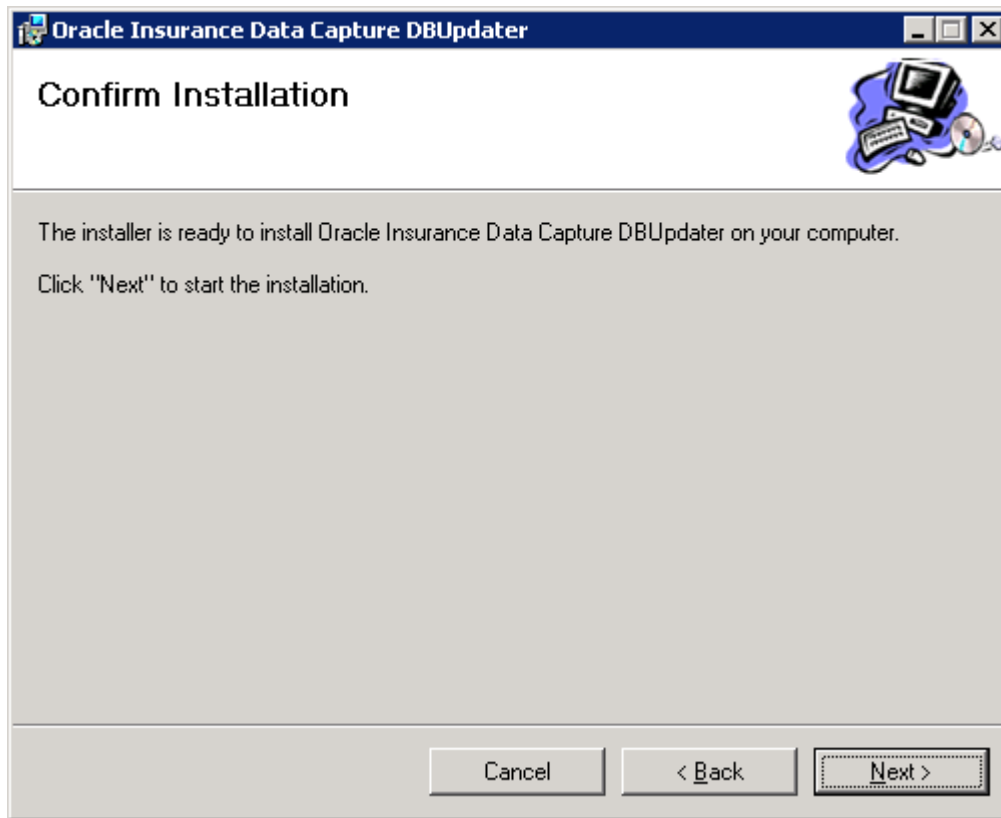


Figure 41 Selecting an Installation Folder

6. You have the option to select another installation directory. If you want another destination directory, browse for the directory you want to use. If the default installation directory is acceptable, Click **Next**. A Confirmation screen will be displayed next.



7. Click **Next** to continue. A progress screen will be displayed.

NOTE: *If there are any problems with the database msi, the installer will stop, and an error message will be displayed. The update will not be saved or completed. You will have to correct the error and begin again.*

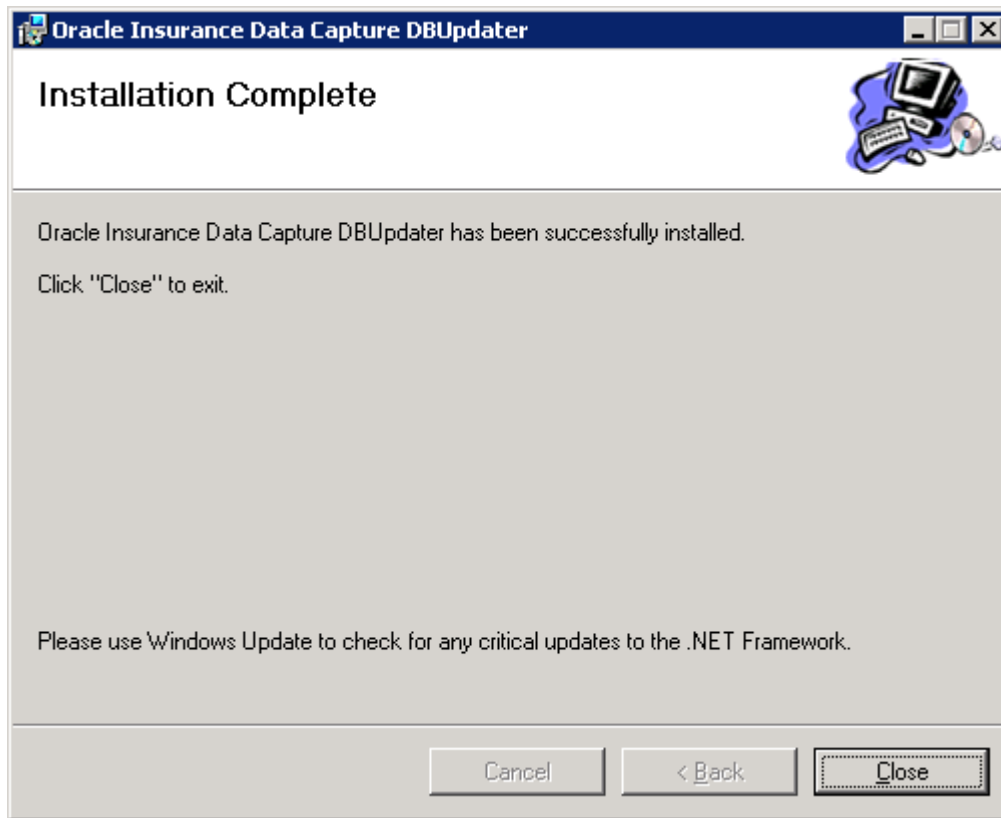


Figure 42 Completed Database Installation

8. When the update is complete, you will receive a success message. Click **Close** to close the installer. A folder should have been created under C:\Program Files\Oracle\IGBU\Datacapture\DBUpdater. This folder contains an executable that will need to be run.
9. Next, enter the C:\Program Files\Oracle\IGBU\DataCapture DBUpdater folder. Run the **DBUpdater.exe**.

OIDC Database Updater

DB Update Script Folder

C:\Program Files\Oracle\OIDC DBUpdater\DBUpdate

Enter connection information for the OIDC databases. Leave the fields blank to skip updating the individual database.

System Database

Server:

Database Name:

☐ Use Windows Authentication

User:

Password:

Client Database

Server:

Database Name:

☐ Use Windows Authentication

User:

Password:

Log Database

Server:

Database Name:

☐ Use Windows Authentication

User:

Password:

Figure 43 DBUpdater

10. Browse for the location of the DBUpdater file that you unzipped in step 6.
11. Enter in the database information for each database.
12. Click **Start Update**. When the updates are complete you will receive a message.
13. When the update is complete, **Exit** out.

Running the Populate QuestionnaireID.SQL Script

For release 4.5, the ibimQuoteProjects table in the client database has a new questionnaireID column. This column needs to be populated with the ID from the ibrlInterfaces table in the system database.

Each customer Questionnaire will have a unique ID. This ID cannot be hard-coded in the database migration script. To populate this column, the PopulateQuestionnaireID script will need to be updated with the correct ID number before being applied.

This task should be performed by a SQL Server DBA or other qualified user who has query access to both the system and the client database.

14. Run a select query against the ibrlInterfaces table in the system database to get all the rows. Write down the 'id' value of the row where the lobid is **NOT 0**.
15. Edit the 'PopulateQuestionnaireID.sql' script file using SQL Server Management Studio or a text editor. Modify the 'update ibimQuoteProjects set QuestionnaireID = X' statement where X is replaced by the ID value obtained in the previous step. Save the 'PopulateQuestionnaireID.sql' script file.
16. Apply this script to the OIDC client database.

Worksite and Palette Updates

Worksite (formerly Questionnaire or Engine) and Palette (formerly Designer) will need to be updated next. For release 4.5 you do not have to remove the previous instances of Engine (or Questionnaire or iQuestionnaire) and Palette (or Designer or iDesigner), but you can if you want.

17. If desired, remove the 4.4, 4.3, or 4.2 Engine or Questionnaire. Please see **Removing OIDC**.
18. If desired, remove the 4.4, 4.3, or 4.2 Palette or Designer. Please see **Removing OIDC**.
19. Run the new 4.5 Worksite setup.exe. Please see **OIDC Worksite Installation**.
20. Run the new 4.5 Palette setup.exe. Please see **OIDC Palette Installation**.
21. The final step is to restore the backup web.config file you created in step 1.
22. Follow the local path to the location of the Worksite (formerly Questionnaire or Engine). The local path will default to the initial installation path or a path selected by the installer. Some common paths are:

C:\Program Files\Oracle\IGBU\DataCapture\Engine

C:\Program Files\Oracle\IGBU\DataCapture\Questionnaire

C:\Program Files\InsBridge\Webs\OIDC\iQuestionnaire

23. Replace the existing web.config file with the one you created in step 1.
24. Enter the Worksite (formerly Questionnaire or Engine) application, click the Administration link. Verify that the information on the Administration page is the correct information. If not, please make any adjustments and click **Apply**.

The system is ready to use.

REMOVING OIDC

OIDC can be removed at any time. If you remove the Worksite or Palette files, be aware that other users will not be able to access the application. The process is the same for both Worksite and Palette.

Each file must be removed or repaired separately. If you only want to remove Worksite, you can do that. Any file that you remove will have to be re-installed.

1. To remove or repair OI DC, click the **Setup.exe** of the program you want to remove or repair. A Repair or Remove screen will be displayed for the desired program. If there is not enough room on the hard drive, the installation will close down. In that case, you must go to the Add/Remove programs on Control Panel.

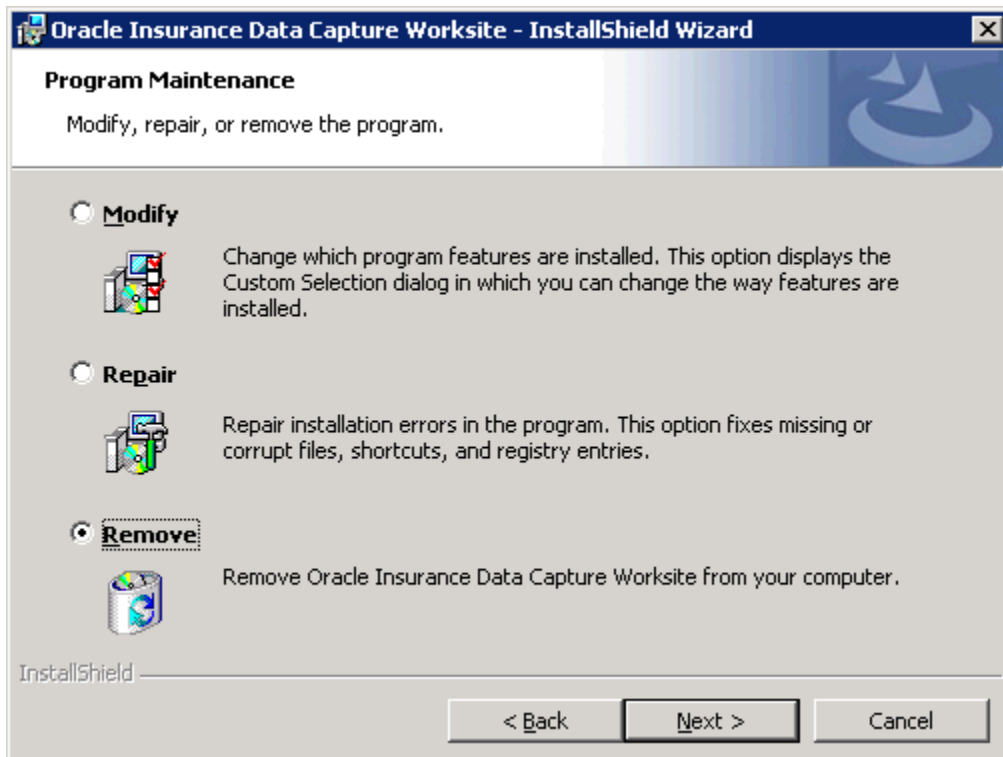
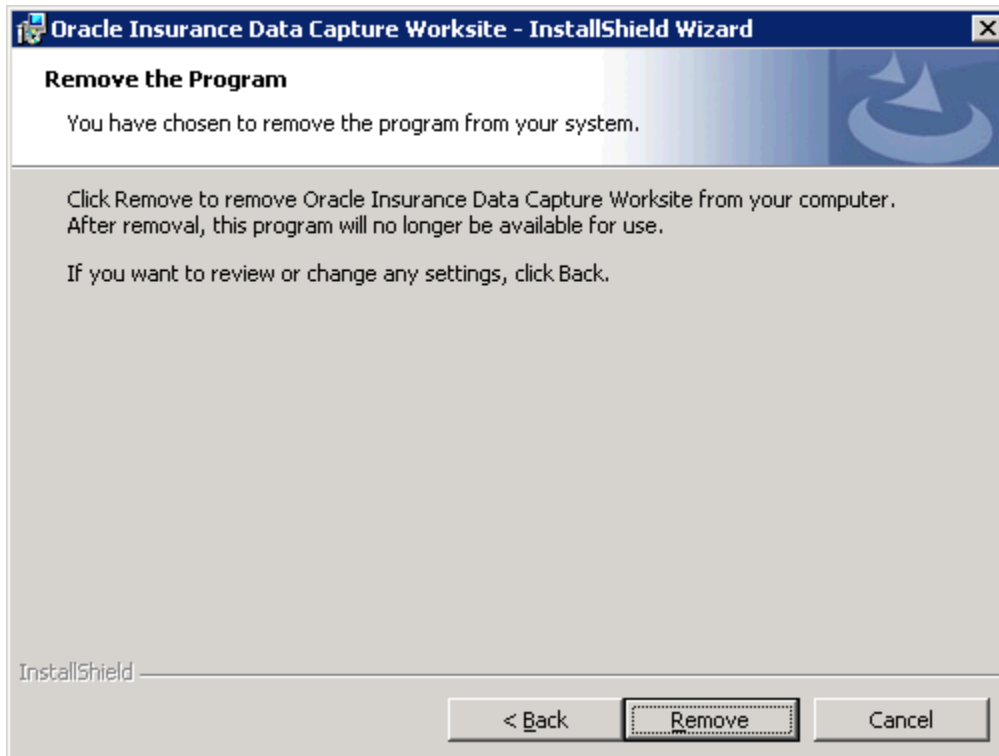


Figure 44 Removing/Repairing OI DC

2. Choose the option you need.
 - a. Modify will re-load the application.
 - b. **Repair** will re-load the application.
 - c. **Remove** will remove the application.
3. If you are removing the file, select **Remove**.
4. Click **Next**.



5. NO warning message will be displayed. The removal begins immediately. The status will be displayed as it progresses.

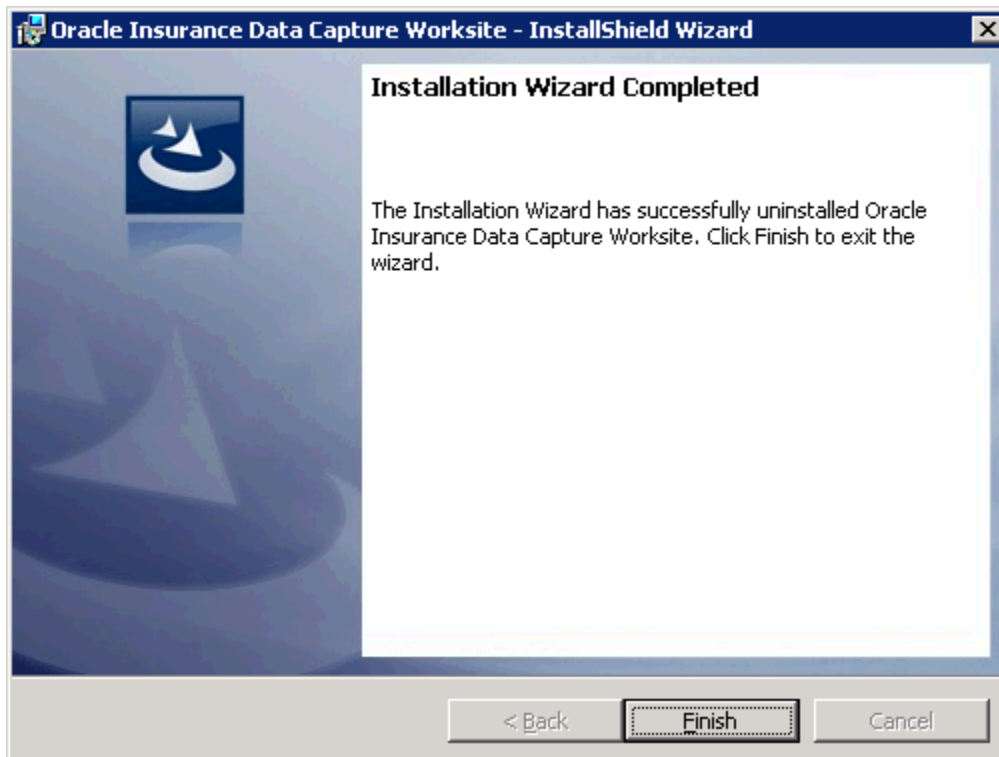


Figure 45 Remove Complete

6. When the program has been removed, a completion screen will be displayed. Click **Finish**.

The program will be removed. You may need to clear the temp files by running a Disk Cleanup program.

Removing OIDC Databases

Removing the OIDC database scripts from the directory created during the last installation. (i.e. C:\Program Files\OIDC\4.2.1\Database) will not remove the databases from SQL Server. Removing the previous database scripts will reduce the chance of an incorrect database script being run.

To Remove Database Scripts

To remove the database scripts, proceed to the location of the database scripts, for example, C:\Program Files\OIDC\4.2.1\Database and delete the files. The files will be removed to the Recycle Bin on your machine.

To Remove Databases from SQL Server

Please consult your MS SQL Sever guide for the recommended method of removing OIDC databases from your SQL Server.

SUPPORT

If you need assistance with an Oracle Insurance Data Capture, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.

Address any additional inquiries to:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

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Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

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