

Oracle Insurance IBRU Installation and Upgrade Guide

Version 3.12

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Oracle Insurance Insbridge Rating and Underwriting Installation and Upgrade Guide

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Contents

FIGURES	. 5
PREFACE	. 6
Audience SoftRater Node Installation E-Delivery Manual History	. 6 . 6 . 7 . 7
CHAPTER 1	. 8
CHECKLIST OF REQUIREMENTS AND PROCEDURES	. 8
CHAPTER 2	10
REQUIREMENTS	10 10 10 11 12 12 13 14 16 17 18
CHAPTER 3	20
FULL INSTALLATION PROCEDURES Insbridge Rating and Underwriting Installation Configuration of the Insbridge Framework Components Configure Registry Access for Windows 2000 Server Configure Registry Access for Windows Server 2003 Windows Temp Folder for MSMQ Permissions for Insbridge Folder Location IBRU Database Creation and Installation in SQL Server SoftRater Database Creation and Installation in Oracle Configuring Insbridge Framework Administrator Updating the Component Services Export Insbridge Registry Key for Backup Export and Import Subscriber Registry Key for SoftRater Node Installation	20 21 27 29 31 34 37 46 47 55 57 57
CHAPTER 4	59
INSTALLING THE OBI PUBLISHER	59
CHAPTER 5	61
UPDATES TO THE INSBRIDGE APPLICATION	61
CHAPTER 6	66
DATABASE UPDATES Working with RateManager for the First Time Running Database Updates in RateManager Oracle Database Setup and Update Instructions	66 66 66 68

Location of DDL Directory	69
CHAPTER 7	70
MANUAL UPDATES TO THE IBRU DATABASES Updating the SoftRater Database from a Lower Version	70 74
CHAPTER 8	75
ADVANCED SETTINGS AND PERMISSION NOTES Advanced Settings for RateManager Permissions Required by the ASPNET Microsoft .NET User Account Default SQL Server Database User Roles and Permissions Required Extended Permission Required by the Insbridge User	75 75 76 76 77
CHAPTER 9	78
SUPPORT	78
INDEX	79

Figures

Figure 1 E	Enabling Active Server Pages and ASP.NET v2.0	11
Figure 2 N	Aessage Queuing Type	12
Figure 3 li	nstalling NET Framework.	13
Figure 4 S	Setting SQL Server	16
Figure 5 [Disabling Windows NT Fibers	17
Figure 6 (Creating New User	18
Figure 7 A	Adding User information	19
Figure 8 li	nstalling Inshridge	21
Figure 9 F	Intering the Destination Folder for Insbridge	22
Figure 10	Logon Information	23
Figure 11	Install ReadMe Screen	26
Figure 12	Configure Registry Access Windows 2000 Server	27
Figure 13	Selecting the inshridge user	28
Figure 14	Setting Permissions	20
Figure 15	Configure Percistry Access Windows Server 2003	20
Eiguro 16	Entering the Licer	30
Figure 10	Applying Dermissions for 2003 Lloor	21
Figure 10	Windows Evolorer WINNT 2000 Deportion	ວາ ວາ
Figure 10	Windows Explorer WINNT 2000 Properties	ວ∠ ^^
Figure 19	Indows Explorer WINNT 2000 Properties	33 24
Figure 20	Inspirage Folder Properties	34 25
Figure 21	Setting Permission for Inspridge Folder	35
Figure 22	Setting Permission for Inspridge Folder	30
Figure 23	Setting up a SQL Server 2000 Database	38
Figure 24	Attaching a Database	39
Figure 25	IB_CLIEN I_xxxx Attached	39
Figure 26	Editing the Database before Attaching	40
Figure 27	Attaching a Database to SQL Server 2005	42
Figure 28	Right Click to Attach Database	42
Figure 29	Attaching a Database	43
Figure 30	IB_CLIENT_xxxx Attached	44
Figure 31	Editing the Database before Attaching	45
Figure 32	IBFA Home	47
Figure 33	Enter ID	48
Figure 34	Setting up the Global Database Connection	49
Figure 35	Setting up the Security Database Connection	50
Figure 36	Setting up the RateManager Database Connection	51
Figure 37	Create a Rating Environment	52
Figure 38	Entering Name and Environment	53
Figure 39	Obtaining Environment Information	53
Figure 40	Editing Environment	54
Figure 47	Component Services	56
Figure 41	SoftRater Node Installation	57
Figure 48	Installing OBI Publisher	59
Figure 49	Insbridge Services Screen	60
Figure 45	Installing Insbridge	61
Figure 46	Entering User Information for Insbridge	62
Figure 43	Available Updates	67
Figure 44	Script Viewer	71
Figure 50	Updating Database	72
Figure 51	Updating Database.	73
Figure 42	Configuring Advanced Settings	75
J		-

Oracle Insurance Insbridge Rating and Underwriting Installation and Upgrade Guide

Preface

Welcome to the Oracle Insurance Insbridge Rating and Underwriting Installation and Upgrade 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 the installation of the Insbridge Rating and Underwriting System.

Audience

This guide is intended for system administrators, installers, database administrators 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 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. You may be asked to provide the part numbers or the filename if you contact Oracle Insurance Support.

The installation downloads you can select are:

- Insbridge IBRU 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.

Manual History

Publication Product Edition Publication Date Comment Number Version 1st Edition P01-701-01 03/28/2005 Updated for new lavout / Windows 2003 2nd Edition P01-701-02 04/14/2005 New layout, updated ASPNET user permissions reg 3rd Edition P01-701-03 V 3.6 Update 03/14/2006 4th Edition P01-701-04 V 3.7 09/28/2006 Update 5th Edition P01-701-05 V 3.8 July 2007 Update 6th Edition P01-701-06 October 2007 V 3.8.3 Update 7th Edition P01-701-07 V 3.8.5 November 2007 Update 8th Edition P01-701-08 V 3.8.7 January 2008 Update 9th Edition P01-701-09 V 3.8.8 March 2008 Update May 2008 10th Edition P01-701-10 V 3.9 Update 11th Edition P01-701-11 V 3.10 Update September 2008 12th Edition P01-701-12 V 3.11 December 2008 Update P01-701-13 13th Edition V 3.12 July 2009 Update

New editions incorporate any updates issued since the previous edition.

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 or 3.5

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

- □ Insbridge IBSR 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

Install OBI Publisher

□ Start Message Service

Import the registry key from RateManager server

1

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 or 3.5
- □ 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 the IBRU System

- 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 IBRM and IB_CLIENT database, and IBSR database

- Insbridge IBRM Database Name: ______
- Insbridge IBSR 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 Database Connection for **rm** pointing to the IBRM_xxxx database
- □ Add Default RateManager Environment for Rating in Scenario Manager
- Configure the Default RateManager Environment
- □ Add SoftRater Environments for loading of SRPs and rating

Install OBI Publisher

□ Start Message Service

Update component services

- **Export and backup Insbridge registry key for safe storage**
- Login to RateManager using USERNAME and PASSWORD
 - Perform IBRU database updates

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 or version 3.5
- JRE Java Runtime Environment (not required for a SoftRater Node 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:

🐚 Internet Information Services	s (IIS) Manager		_ 🗆 🗡
🐚 <u>F</u> ile <u>A</u> ction <u>V</u> iew <u>W</u> indow	Help		_ 8 ×
← → 🗈 🖬 🖗 🚱			
Internet Information Services	🃁 Web Service Extensions	-	
Application Pools	Select an item to view its description.	A Web Service Extension	Status
Web Service Extensions		🍸 All Unknown CGI Extensions	Prohibited
		🍸 All Unknown ISAPI Extensions	Prohibited
		😼 Active Server Pages	Allowed
		NET v2.0.50727	Allowed
		😼 FrontPage Server Extensions 2002	Allowed
		🔊 Internet Data Connector	Prohibited
		🔊 Server Side Includes	Prohibited
		🔊 WebDAV	Prohibited
	Extended Standard		

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.

Windows Components Wizard	×
Message Queuing Type Please select the type of message queuing software to install	
 Select an MSMQ type: Message Queuing server Message Queuing servers store messages locally, and can send and receive messages even when not connected to a network. Routing provides message storage and forwarding services. Enable routing Manually select access mode to Active Directory Dependent client Dependent clients do not store messages locally, and must be connected to the supporting server to send and receive messages. 	ir
< <u>B</u> ack <u>N</u> ext > (Cancel

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 doubled 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.

Appl	lication Cor	nfiguration	×
Ap	p Mappings	App Options App Debugging	
Ŀ	Z Cache IS/	APL applications	
	-Application	Mannings	
	Eutonoion	Europhilip Dath	
	Extension		
	.idq	C:\\v(INNT\System32\idq.dll GET,HEAD	
	.asp .cer	C. WINNELSystem32\ineterv\asp.dl GET.HEAD	
	.cdx	C:\WINNT\System32\inetsrv\asp.dl GET.HEAD	
	asa	C:\WINNT\System32\inetsry\asp.dl GET.HEAD	
	htr	C:\WINNT\system32\inetsry\asp.dll GET.POST	
	.idc	C:\WINNT\System32\inetsrv\httpodbc.dll OPTIONS.(
	.shtm	C:\WINNT\System32\inetsrv\ssinc.dll GET,POST	
	.shtml	C:\WINNT\System32\inetsrv\ssinc.dll GET,POST	
	.stm	C:\WINNT\System32\inetsrv\ssinc.dll GET,POST	
	.printer	C:\WINNT\System32\msw3prt.dll GET,POST	
	1		
	Add	Edit Bemove	
_			
	Г	OK Cancel Apply Help	

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_regiss.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 76 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 <u>http://www.java.com/en/download/</u>

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 <u>http://support.microsoft.com/kb/811770</u>.

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 <u>http://support.microsoft.com/kb/817064/en-us</u> 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.

QL Server Properties (Configure) - DB1				
Server Settings Database Settings Replication Active Directory General Memory Processor Security Connections				
Security SQL Server provides authentication based on Windows accounts and a named SQL Server login ID and password.				
Authentication:				
C <u>Wi</u> ndows only Audit level:				
© <u>N</u> one C <u>F</u> ailure C S <u>u</u> ccess C All				
Startup service account Start and run SQL Server in the following account:				
C Inis account				
OK Cancel Help				

Figure 4 Setting SQL Server

• NT Fibers must not be enabled (not enabled by default).

SQL Server Properties (Configure) - DB1				
Server Settings Database Settings Replication Active Directory General Memory Processor Security Connections				
Processor control In a symmetric multi processor (SMP) environment, specify which processors SQL Server will use.				
Processor				
Maximum worker threads: 255 ÷ ✓ Boost SQL Server priority on Windows Use Windows NT fibers				
Parallelism Specify the number of processors to use for parallel execution of queries:				
Uge 1 processor(s) Minimum query plan threshold for considering queries for parallel execution (cost estimate): 5				
<u>Configured values</u> <u>C</u> Running <u>values</u>				
OK Cancel Help				

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.

🗏 Computer Management				
Eile Action View Window H	elp			
Computer Management (Local) Computer Management (Local) System Tools Computer Management (Local) System Tools Computer Management Computer Management Computer Manager Computer Manager Computer Manager Computer Manager Computer Manager Computer Manager Computer Management Computer Manageme	Name Administrator ASPNET Guest HelpAssistant IUSR_PLQAD IWAM_PLQA Mary SUPPORT_38	Full Name ASP.NET Machine Account Remote Desktop Help Assi Internet Guest Account Launch IIS Process Account CN=Microsoft Corporation	Description Built-in account for administering the Account used for running the ASP.N Built-in account for guest access to t Account for Providing Remote Assist Built-in account for anonymous acce Built-in account for Internet Informa This is a vendor's account for the He	

Figure 6 Creating New User

Add a new user using the following information:

New User		? 🛛		
<u>U</u> ser name:	Insbri	dge		
<u>F</u> ull name:	IBRU	User		
Description:	IBRU	User		
<u>P</u> assword:		•••••		
<u>C</u> onfirm password:	Confirm password:			
User <u>m</u> ust change password at next logon				
✓ User cannot change password				
Pass <u>w</u> ord never expires				
Account is disa <u>b</u> led				
		Cr <u>e</u> ate Cl <u>o</u> se		

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 77.

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.

Full Installation Procedures

The installation must be performed in the following order:

- Install IBRU
- There are three permissions you must assign before you can continue.
 - Registry Access
 - Temp Folder for MSMQ
 - Insbridge Folder
- 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.
- Updating Component Services.
- Exporting Registry Key.
- Installing OIB Publisher.

The download files you receive will be zip files. Unzip the file to the machine where RateManager and Insbridge Framework will be located.

For this part of the install, you will need the 3.12.0 Insbridge IBRU folder. Folder includes:

1. 3.12.0-Insbridge-IBRU folder

- Databases

- Oracle folder
 - SoftRater IBSR
 - Usp_IBSR_v03.12.0.oracle
 - SQL Server
 - RateManager IBRM
 - IBRM_TEMPLATE.mdf
 - Security IB_CLIENT
 - IB_CLIENT_TEMPLATE.mdf
 - SoftRater IBSR
 - IBSR_TEMPALTE.MDF
 - o Usp_IBSR_v03.12.0
- IE7 Users

Insbridge IE7 Active X Registration PDF RateManager IE7

- Oracle Bl Publisher
 - OBI_PUBLISHER
- Oracle Client
- Oracle Insurance Insbridge Rating and Underwriting Install file

Insbridge Rating and Underwriting Installation

Begin with Oracle Insurance - Insbridge Rating and Underwriting Install file.

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 Oracle Insurance – Insbridge Rating and Underwriting file.

A Welcome screen will be displayed.

🛱 Oracle Insurance - Insbridge Rating and Underwriting 3.12.0 S 🔳 🗖 🔀
4 Oracle Insurance Insbridge Rating and Underwriting
It is strongly recommended that you exit all Windows programs before running this setup program.
Click Cancel to quit the setup program, then close any programs you have running. Click Next to continue the installation.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
< <u>B</u> ack <u>Next</u> Cancel

Figure 8 Installing Insbridge

1. Click **Next** to continue.

🔀 Oracle Insurance - Insbridge Rating and Underwriting 3.	12.0 S 💶 🗖 🔀
Destination Folder Select a folder where the application will be installed.	
The Wise Installation Wizard will install the files for Oracle Insurance - and Underwriting in the following folder. To install into a different folder, click the Browse button, and select an You can choose not to install Oracle Insurance - Insbridge Rating and clicking Cancel to exit the Wise Installation Wizard.	Insbridge Rating other folder. Underwriting by
C:\Program Files\Oracle\IGBU\Insbridge\	Browse
Wise Installation Wizard (R) < <u>B</u> ack <u>N</u> ext	> Cancel

Figure 9 Entering the Destination Folder for Insbridge

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

🔂 Oracle Insura	nce - Insbridge Rating	and Underwriting 3.1	2.0 S 💶 🗖 🔀
Logon Information The following log	on gon information is used by Insb	oridge.	
Specify a use logging onto (For domains,	er account to be used by the a other servers. Use the Browse user names must be in the for	pplication, either for running a button to choose users from mat of DOMAIN\UserName.	a service or for your network.
User Name:	Insbridge		Browse
Password:	xxxxxxxx Create New User		-
Wise Installation Wiza	ard (R)	< <u>B</u> ack Next≻	Cancel

Figure 10 Logon Information

The logon information screen will be displayed. You must specify a user account to be used by the application. Please use the Insbridge user account that you set up earlier.

It is not recommended to Create a New user at this point. Specific permissions must be held by this user. You may not be able to create a new user with those permissions at this point.

- 3. Enter the Insbridge user name and password for the local user account you set up earlier.
- 4. Click **Next** to continue.

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.

🙀 Oracle Insurance - Insbridge Rating and Underwriting 3.12	.0 S 🔳 🗖 🔀
Select Features Please select which features you would like to install.	
Insbridge Rating & Underwriting Insbridge Rating & Underwriting RateManager BateManager Will be installed on local hard drive. Entire feature will be installed on local hard drive. Feature will be installed when required.	ss users to create, x rates and rules iting engine in an on the local hard
	on your hard drive.
Current location: C:\Program Files\Oracle\IGBU\Insbridge\	
Wise Installation Wizard (R) Disk Cost Reset < Back	Cancel

5. Click **Next** to continue.

Options are:

- Insbridge Rating and Underwriting:
 - The default option is: Entire feature will be installed on local hard drive.
 - 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. You do not need to install RateManager when you are installing a SoftRater node only.

• 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.

🔀 Oracle Insurance - Insbridge Rating and Underwriting 3.	12.0 S 🔳 🗖 🔀
Ready to Install the Application Click Next to begin installation.	
Click the Back button to reenter the installation information or click Car the wizard.	ncel to exit
Wise Installation Wizard (R) < <u>B</u> ack <u>N</u> ext	> Cancel

6. 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.

🛃 Oracle Insurance - Insbridge Rating and Underwriting Setup	
Updating System Image: Constant of the features you selected are currently being installed. Instant Image: Constant of the features you selected are currently being installed.	
Copying new files File: Diff_Report.rtf Directory: C:\Program Files\Oracle\IGBU\Insbridge\Framework\2.0.0\\ Size: 722323	`
Wise Installation Wizard (R)	Cancel

🙀 Oracle Insurance - Insbridge Rating and Underwriting 3	.12.0 S 🔳 🗖 🔀
Readme Information Insbridge has been successfully installed.	
Microsoft Windows 2000/2003 Server A full installation of Microsoft Windows 2000 (either Server or A or Microsoft Server 2003 is required. The following configuration the administrator of the server to be generally familiar with mar server.	Advanced Server) n assumes that naging a Windows
Components of Windows 2000/2003 Server All Windows Server components are available for installation fr Panel, Add/Remove Programs applet by selecting Add/Remov Components. In order to install these Windows Components, y required to have the Windows Installation CDROM available.	om the Control e Windows you may be
Internet Information Services (IIS) The InsBridge Rating and Underwriting System is a web based	l application and 💌
Wise Installation Wizard® < <u>B</u> ack	sh Cancel

Figure 11 Install ReadMe Screen

7. 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 12 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.

👯 Select Users or Groups			? ×
Look in: 📃 skywire.com			•
Name	In Folder		
🕵 insbridge	skywire.com/Users		
🕵 ANONYMOUS LOGON	skywire.com/Users		
Authenticated Users	skywire.com/Users		
BATCH	skywire.com/Users		
CREATOR OWNER	skywire.com/Users		
	skywire.com/Users		-1
I SIZINTE BALTIVE	skywire.com/Users		
Add Check Names			
<< Type names separated by semicolons or choose	irom list >>		
		OK Cance	:I
	-		<u> </u>

Figure 13 Selecting the insbridge user

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

rmissions for Insbridge Security		?)
Name IBRU User (skywire.com\insbridge) Power Users (skywire.com\Power Users) SYSTEM TERMINAL SERVER USER Users (skywire.com\Users) Isers (skywire.com\Users)	sers)	A <u>d</u> d <u>R</u> emove
Permissions: Read Full Control		Deny
Advanced Allow inheritable permissions from pare object	ent to propa	gate to this
ОК	Cancel	Apply

Figure 14 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.

💣 Registry Editor				
File Edit View Favorites Help				
🖃 💻 My Computer	Name	Туре	Data	
HKEY_CLASSES_ROOT HKEY_CLASSES_ROOT HKEY_CLASSES_ROOT HKEY_CLASSES_ROOT HKEY_LOCAL_MACHINE HKEY_LOCAL_MACHINE SAM SAM SAM SAM SOFTWARE GENPLUS GENPLUS GENPLUS GENPLUS GENPLUS GENPLUS COPKEYN HKEY_CURRENT_CONFIG HKEY_CURRENT_CONFIG	ame	REG_SZ	(value not set)	
My Computer/HKEY LOCAL MACHINE/SOFT	WARE\Tochridge			
MA COMPUTER HYER TOCAL MACHINE (2014)	WAKE (LIISUNDGe			

Figure 15 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**.

Select Users or Groups		? 🛛
<u>S</u> elect this object type:		
Users, Groups, or Built-in security principals		Object Types
<u>F</u> rom this location:		
PLQAD0C01		Locations
Enter the object names to select (<u>examples)</u> :		
insbridge		Check Names
Advanced	ОК	Cancel

Figure 16 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, 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.
 - ? > Permissions for Insbridge Security Group or user names: 🕵 Administrators (PLQADOC01\Administrators) **CREATOR OWNER** 🕵 Insbridge (PLQADOC01\Insbridge) 🕵 Mary (PLQADOC01\Mary) Rever Lloors (PLOADOC01) Power Lloors) > < Add... Remove Permissions for Insbridge Allow Denv Full Control **~** Read Special Permissions For special permissions or for advanced settings, Advanced click Advanced. 0K Cancel Apply
- 8. Once the name is listed, click **OK**.

Figure 17 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 18 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 18 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 19 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 18 to the installation location for the Insbridge folder. This is the location you selected to install the IBFA, most likely C:\Program Files\Oracle\IGBU\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 Oracle folder. Select the IGBU folder. Select the Insbridge folder.



Figure 20 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 21 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**.

InsBridge Properties		? ×
General Web Sharing Sharing Security]	
Name IBRU User (skywire.com\insbridge) Power Users (skywire.com\Power User SYSTEM TERMINAL SERVER USER Hsers (skywire.com\Users)	▲ <u>Add</u> rs) <u> </u>	
Permissions:	Allow Dei	ny
Full Control Modify Read & Execute List Folder Contents Read Write Special Permissions For special permissions or for advanced sett click Advanced.		▲ ▼ ced
	ancel () polu
		3660

Figure 22 Setting Permission for Insbridge Folder

10. Click **OK**. You can close out Windows Explorer.
IBRU Database Creation and Installation in SQL Server

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 IMPORTANT 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.
- 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 3.11.
- 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 3.11 version to a 3.12 version only.



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				
Database	RateManager	SoftRater			
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

NOTE

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**.

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.

 Copy files. The IBRM_TEMPLATE is located in the Databases>Sql Server>RateManager folder and the IB_CLIENT_TEMPLATE database file is located in the Databases>Sql Server>Security folder. The IBSR_TEMPLATE file is located in the Databases>Sql Server>SoftRater 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 3.12 installation then the only databases needed are the IB_CLIENT_TEMPLATE and IBSR_TEMPLATE.

- 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 23 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.

Attach Database - (local)	×
MDF file of database to attach:	… ⊻erify
Original File Name(s)	Current File(s) Location
•	>
<u>A</u> ttach as:	
Specify database owner:	Insbridge 💌
	OK Cancel Help

Figure 24 Attaching a Database

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

Attach Database - (local)	×
MDF file of database to attach: D:\Database\Insbridge\DBs\I	B_CLIENT.mdf
Original File Name(s)	Current File(s) Location
IB_CLIENT.dat	X D:\Database\Insbridge\DBs\IB_CLIENT.dat
IB_CLIENT.log	X D:\Database\Insbridge\DBs\IB_CLIENT.log
<u>A</u> ttach as:	IB_CLIENT
Specify database owner:	Insbridge 💌
	OK Cancel Help

Figure 25 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.

Attach Database	- (local)					×
<u>M</u> DF file of databa D:\Database\Ins	se to attach: bridge\DBs\IB_C	LIENT.mdf				⊻erify
ame(s)	Current File(s) L	Location				_
IB CLIENT.dat	🖉 D:\Databa	se\Insbridge\I	DB <u>s</u> MB,	_CLIENT.mc	lf	
IB CLIENT.log	×					
•						▼
<u>A</u> ttach as:		IB_CLIENT				
Specify database (owner:	Insbridge				•
		ОК		Cancel		Help

Figure 26 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.

SQL Serve	er Enterprise Manager 🛛 🔀
⚠	The filename specified for the log file is incorrect. A new log file may be created. Do you want to continue?
	Yes No

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

SQL Serve	er Enterprise Manager 🛛 🗙
٩	Attaching database has completed successfully.
	OK

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 36 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 76 for further details on tightening user permissions.

For SQL Server 2005

NOTE

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**.

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.

 Copy files. The IBRM_TEMPLATE is located in the Databases>Sql Server>RateManager folder and the IB_CLIENT_TEMPLATE database file is located in the Databases>Sql Server>Security folder. The IBSR_TEMPLATE file is located in the Databases>Sql Server>SoftRater 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 3.12 installation then the only databases needed are the IB_CLIENT_TEMPLATE and IBSR_TEMPLATE.

- 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.

Mary						
Manage Your	Server	😏 My Computer				
CAL Command Pro	ompt	📴 Control Panel	•	_		
C 2.	🥸 Windows	Catalog				
Windows Exp	🍓 Windows	Update				
	🕅 Zip		•			
Notepad	Accessor	ies	•			
	🛅 Administr	ative Tools	•			
Studio	🛅 BEA Prod	ucts	•			
Microsoft .NET	🛅 BEA Prod	ucts (BEAHOME 1)	•			
1.1 Wizards	icrosoft	NET Framework SDK v1.1	•			
😪 SQL Server Cor	💼 Microsoft	SQL Server 2005	•	D	Analysis Services	
Manager	Microsoft	Visual Studio 2005	•		Configuration Tools	•
	C Startup				Performance Tools	×
	Symante	c Client Security	•		SQL Server Business Intelligence Development Studio)
	C Internet	Explorer -			SQL Server Management Studio	
		xpress			Documentation and Tutorials	<u> </u>
All Programs	Microsoft	Visual SourceSate	•			
	Remote	Assistance	_			
		🖉 Log Off 🛛 🚺 Shut Dov	vn			

Figure 27 Attaching a Database to SQL Server 2005

4. Go to Databases.

Microsoft SQL Server Management Studio	
<u>E</u> ile <u>E</u> dit <u>Y</u> iew <u>T</u> ools <u>W</u> indow <u>C</u> ommunity <u>H</u> elp	
🕴 🎦 New Query 🔓 📸 📸 🖓 🔯 💕 🔩 🖬 🕯	
Object Explorer - 🗣 🗙 Obje	ect Explorer Details
Connect • 🛃 🔳 🍸 🛃	
E SOUTHERN (SQL Server 9.0.3042 - SKYWIRE)	
🖃 🚞 Databases	
Attach	SOUTHERN/Databases 81 Item(s)
Agento Agento Agento Agento Agento Agento Agento Agen	
AR_3 AR_3	tem Databases
	cabase Snapshots
AR_3	entRater_Auditing
AR_3 Keiresii	_3_3_CLIENT_PIC
E BRM WE 36	AR_4_0_TIH
IBRM WF 37	AR_4_0_TIH_QA
I IBSR	AR_4_0_TIH_test
🗉 🖬 INSH	AR_4_0_WFI
🕀 📔 ReportServer	AR_4_0_WFI_QA
🗉 🧻 ReportServerTempDB	CIVINE
🗉 📄 Security 🔰 🔰	IB_CLIENT
🕀 🤖 Server Objects	IB_CLIENT_37
🖅 🚞 Replication 🧾 🔰	IB_CLIENT_38
🕀 📄 Management 🛛 🚺	IB_CLIENT_AM
🛛 🕀 📴 Notification Services	IBIM_AI3
🗉 📆 SQL Server Agent 📃 🔳	

Figure 28 Right Click to Attach Database

- 5. Right click on **Databases**.
- 6. Select Attach... A separate screen will be displayed.

🧃 Attach Databases						
Select a page	🔄 Script 👻 📑 Help					
🚰 General	Databases to attach:					
	MDF File Locat	ion Database	Attach As	Owner	Status	Message
			, 	<u>A</u> dd		<u>R</u> emove
					,	
	Uriginal File Name	File Type Curre	ent File Path	N	lessage	
Connection						
Server: southern						
Connection: SKYWIRE\cg						
View connection properties						
Progress						
						Re <u>m</u> ove
				C	ж	Cancel

Figure 29 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.

じ Locate Database File	s - SOUTHERN		_ 🗆 ×
Select the file:			
	T.mdf		
Borning Downloads Downloads Insbridge My.Net Packages PointBase Program Files Downloads			
	SQL Server L.1 SSQL Backup		T
Selected <u>p</u> ath:	D:\DBs		
Files of <u>type:</u> File <u>n</u> ame:	Database Files(*.mdf) IB_CLIENT.mdf		•
-		ОК	Cancel

Figure 30 IB_CLIENT_xxxx Attached

9. Click OK.

ect a nage	Covint - Collabo						
General	🔄 Script 🔹 🚺 Help						
deneral							
	Databases to attach:						
	MDF File Locatio	on		Database	Attach As	Owner	
	D:\Program Files	s\InsBridge\Da	atabases\IB	IB_CLIEN	IB_CLIEN	SKYWI	
	4				1		
	Rename to .mdf			Ad	d	<u>R</u> emove	
	"IB_CLIENT" databas	se details:					
	Original File Name	File Tune	Current File Path			essage	
c	Original File Name	File Type	Current File Path	\losBridge\D atab	1	dessage	
onnection	Original File Name	File Type Data	Current File Path D:\Program Files	\InsBridge\Datab	asest	Message	
prinection	Original File Name IB_CLIENT IB_CLIENT	File Type Data Log	Current File Path D:\Program Files D:\Program Files	<u>\InsBridge\Datab</u> \InsBridge\Datab	ases\	Vessage Not Found	
onnection jerver: ;outhern	Original File Name 18_CLIENI 18_CLIENT	File Type Data Log	Current File Path D:\Program Files D:\Program Files	<u>\InsBridge\Datab</u> \InsBridge\Datab	ases\	Vessage Not Found	
onnection Server: Jouthern Connection:	Original File Name IB_CLIENI IB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files D:\Program Files	<u>\InsBridge\Datab</u> \InsBridge\Datab	ases\	Message Not Found	
onnection Server: Jouthern Connection: SKYWIRE\cg	Original File Name ID-CLIENI IB-CLIENT Delete	File Type Data Log	Current File Path D:\Program Files D:\Program Files	<u>\InsBridge\Datab</u> \InsBridge\Datab	ases\	Message Not Found	
onnection Server: southern Connection: SKYWIRE\cg	Original File Name HO-GLIENI TB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files	<u>\InsBridge\Datab</u> \InsBridge\Datab	ases\	Not Found	
onnection Server: outhern Connection: SKYWIRE\cg	Original File Name IB_CLIENT IB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files	\ <u>InsBridge\Datab</u> \InsBridge\Datab	ases\	Not Found	
onnection Server: southern Connection: SKYWIRE\cg View connection properties rogress	Original File Name IB_CLIENI IB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files D:\Program Files	<u>\InsBridge\Datab</u> \InsBridge\Datab	ases\	Not Found	
onnection Server: Southern Connection: SKYWIRE\cg View connection properties rogress Readu	Original File Name IB_GLIENI IB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files D:\Program Files	<u>\InsBridge\Datab</u>	ases\ 1	Not Found	
onnection Server: southern Connection: SKYWIRE\cg View connection properties rogress Ready	Original File Name IB_CLIENT IB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files	<u>\InsBridge\Datab</u>	ases\ 1	Not Found	
onnection ierver: outhern ionnection: KYWIRE\cg View connection properties ogress Ready	Original File Name IB_CLIENT IB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files	<u>\InsBridge\Datab</u>	ases\ I	Not Found	
onnection erver: outhern connection: KYWIRE\cg View connection properties ogress Ready	Original File Name IB_CLIENI IB_CLIENT Delete	File Type Data Log	Current File Path D:\Program Files	<u>\InsBridge\Datab</u>	ases\ I	Not Found Not Found	

Figure 31 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 36 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 76 for further details on tightening user permissions.

SoftRater Database Creation and Installation in Oracle

Oracle database files are packaged in the install. The file is located in the Databases >Oracle >SoftRater folder. The file name is usp_IBSSR_v03.12.0.oracle.

Please see Oracle Database Setup and Update Instructions for further instructions.

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.
-----------	--

Configuring 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/







1. Click on Add Subscriber and in the next dialog.

The Type, ID and Name information for the new subscriber is chosen by you. The Type, ID and Name are fixed after the first time you save. These entries cannot be edited. Only the description can be edited.

NOTE

If you have more than one instance of IBFA, it is strongly suggested that you create the identical Subscriber, Type, ID and Name in every instance.

The Subscriber ID can be a 3 or 4 digit number and must unique for each subscriber per instance of IBFA. For example, if you have an instance of IBFA on machine A, you can create a subscriber with an ID of 100. On machine A, if you create another subscriber, you must give that subscriber a different ID number, say 200. If you also have an instance of IBFA on a different machine, B for example, you should duplicate the same subscribers with the same ID numbers on machine B.

If you require assistance or are unsure of what action to take, please log a Service Request using My Oracle Support at <u>http://metalink.oracle.com</u>.

🗿 Subscriber Web Page Dialog 🛛 🛛 🔀	
Clients nts	
Subscriber	
Please enter/update your Insbridge Customer information below.	
ID: 1002	
Name: Mary	
Desc: MARY RM	
Save Cancel	

Figure 33 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
- If you are using a SQL Server **SoftRater** database, you can add and configure the SoftRater database through IBFA. If you are using another database platform, Oracle for example, you will need to configure the SoftRater database there.

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.



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

🖉 Connecti	on Webpage Dialog	
Data	ıbases	Ses
Connection Database conr	nections can be global to the Insbridge Fran	nework or unique to the Subscriber.
Subscriber:	Global	
Name:	controller	
Server:	LOCALHOST	Test Connection
Server Type:	SQLServer 💌	
Catalog:	IB_CLIENT_MARY	
Catalog Type:	Other 🖌	
Query Buffer:		
Tablespace:		
Schema:		
User:	sa	
Password:	•••••	
		Save Cancel

Figure 34 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. You also can test the connection and make sure it is valid at the time of entry.

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. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.

Tablespace and Schema are not required for this connection. The User is the SQL Server user (ibru) assigned as database owner on page **Error! Bookmark not defined.**, 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.

🙋 Connecti	on Webpage Dialog	X
Data	ıbases	ISES dose
Connection Database conr	ections can be global to the Insbridge Fran	nework or unique to the Subscriber.
Subscriber:	MaryRM 🗸	
Name:	security	
Server:	LOCALHOST	Test Connection
Server Type:	SQLServer 💙	
Catalog:	IB_CLIENT_MARY	
Catalog Type:	Other 🗸	
Query Buffer:		
Tablespace:		
Schema:		
User:	sa	
Password:	•••••	
		Save Cancel

Figure 35 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.

🙆 Connecti	on Webpage Dialog	X
Data	ıbases	Ses
Connection Database conr	ections can be global to the Insbridge Fran	nework or unique to the Subscriber.
Subscriber:	MaryRM 💙	
Name:	rm	
Server:	LOCALHOST	Test Connection
Server Type:	SQLServer 🗸	
Catalog:	IBRM_MARY	
Catalog Type:	RateManager 💙	
Query Buffer:		
Tablespace:		
Schema:		
User:	sa	
Password:	•••••	
		Save Cancel

Figure 36 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.

Image: Section 1 Image: Section 1 Image: Section 1 Image: Section 1 Image: Section 1 Image: Section 1 Image: Section 1 <th>🖉 Framework Administrator (PLQ</th> <th>ADOCO1) - Windows Intern</th> <th>net Explorer</th> <th></th> <th></th>	🖉 Framework Administrator (PLQ	ADOCO1) - Windows Intern	net Explorer		
Image: Big is provide into the provide into th	🔆 💽 🗸 🙋 http://00.100.0.00/ibf	a/		🖌 🔶 🗙 Live Search	- Q
	Ele Edit View Favorites Iools	Help			
<text></text>	🚖 🕸 🌈 Framework Administrator (PLQADOC01)		🟠 • 🖾 - 🖶 • 🔂 Bage •	Tools
Image: solid star Image: solid so	Framework Administrator - Version 2.	3.2		त्व	INSBRIDGE
Config <p< td=""><td></td><td></td><td></td><td></td><td></td></p<>					
Copyright © 2000,2009, Orade and/or its affiliates. All rights reserved.	 Inderidge Softbater Engine Softbata Softbata Softbata Softbata Softbata Softbata Softbata Softbata Weightbata Softbata Weightbata Weightbata Weightbata Weightbata Weightbata Weightbata Softbata Softbat	Config Explorer MARY	Add, odi, or remove en jonnents from your Explorer configuration. NMEE DESCRIPTION Inc.of.Buscher Management Your risking block of businesses are identified by an id and a description. There is no limit to the number of LOB's (ine-of-business) that your Explorer can contain. IDE-DESCRIPTION IDE-DESCRIPTION IN these stress when you must download SoftRater packages from different locations. These locations require a domain and of a packages of the particular server. DESCRIPTION - SERVER - TYPE - ENVIRONMENT No file servers found.		
			Copyright © 2000,2009, Oracle and/or its affiliates. All rights reserved.		

Figure 37 Create a Rating Environment

Click on Add Environment.

🗿 Envi	ronments Web Page Dialog	
Sof	ftRater	
A SoftRa environm	ter configuration can support an unlimited ents.	I number of
Name:	RM_Default]
Type:	Dev 🗸]
Secure:		
	Save	Delete Cancel

Figure 38 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 - V	ersion 2.3	.2	
	×		
🖃 🚞 Insbridge		Contig	
🖂 🚞 SoftRater			
🚞 Engine		\sim	
🖃 🚞 Explorer		Explorer	Add Environment
→ MARY	(MARY	Add, edit, or remove environments from your Explorer configuration.
🚞 SoftData			NAME - DESCRIPTION
🚞 Services			🖉 RM. Default - Development
🕀 🛄 Logs		\sim	
🕀 🚞 Security			Production - Production



🌈 Framework Administrator (PLQ)	ADOCO1) - Windows Inte	rnet Explorer					
📀 🗸 🖉 http://10.100.00//bf	a/default.asp×					🔽 😽 🗙 Live Search	₽ -
Ele Edit View Favorites Tools	Help						
🚖 🏟 🌈 Framework Administrator (PLQADOC01)					🐴 • 📾 • 🖶 • 🕞	Page • 🍈 Tools • »
Framework Administrator - Version 2.3	3.2						
X							
🖂 🦳 Insbridae	Config						
🖂 🦳 SoftRater							
Ca Engine							^
E 🔁 Explorer	Explorer	Environment(c) you u	DEVELOPMENT	Selection an environ	ment helow will denote it as the defau		
MARY	MARY	Environment(s) your	nay ase for development parposes.	Selecting an environ	inche below will denote it as the denad		
SoftData		Environment:	DM Default	۲			
E logr		Rackage Location:	NN_DOIGUR		Test Environment		
E Security		DB Server:	DR Sarvar				
SoftLibraries		DB ServerTures	SOI Server				
 Help 		DB Server type:					=
		DD Catalog.	DRIN_MARKI				
		DB Querry Bufferry	Racemanager				
		DB Query Burrer:					
		DP Schempt					
		DB Licovi	0				
		DB Pacewords	50				
		Engine Turney	Wedeus				
		Engine Type:					
		Engine Eocación.	Locathosi	Discover			
		Engine Enviren:		Discover			
			QA				
		Environment(s) you i	nay use for quality assurance purp	uses. Selecting an en	vironment below will denote it as the d	efault.	
		Environment:	0A	0			
		Package Location:	ş.,		Test Environment		
		DB Server:					
		DB ServerType	SOI Server				
		DB Catalon:					
		DB CatalogType:	Other 🗸				
		DB Query Buffer:					
		DD Tablasson					~
			Copyright © 2000,	2009, Oracle and/or i	ts affiliates. All rights reserved.		

Figure 40 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 Insbridge IBFA User Manual (Located in the User Guides directory) for more information.

Updating the Component Services

Next, you will need to update the component services.

- 1. Click Start ▶ Programs ▶ Administrative Tools ▶ Component Services.
- 2. Expand the Component Services option under console Root.
- 3. Expand Computer>>My Computer>COM+ Applications.
- 4. Expand each Insbridge **COM+ library** to make sure there are components listed underneath each compartment.

Scomponent Services		
🚱 Eile <u>A</u> ction <u>V</u> iew <u>W</u> indow <u>H</u> elp	And a second	_ & ×
← → 🗈 📧 × 🐨 🖸 😫 🖬 🎽 🏝 🗄 🕮	i # 😐	
Console Root Component Services Computers My Computer COM+ Applications COM+ Applications COM+ Q Dead Letter Queue Listener COM+ Utilities COM+ Utilities IIS In-Process Applications IIS Out-Of-Process Pooled Applications IIS Utilities IIS Utilities IIS Utilities IIS Dut-Of-Process Pooled Applications IIS Utilities IIS Utilities IIS Bridge Com+ Administrator 2.0 InsBridge Com+ SoftRater Engine IISBridge Com+ SoftRater Library MQTriggersApp IIS Software Shadow Copy Provider System Application DCOM Config DOCM Config Event Viewer (Local) Services (Local)	InsBridge Com+ Administrator 2.0	3 object(s)

Figure 41 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	

<u>If any COM+ library is missing</u>, run the IBRU install again from the msi file and choose uninstall. Then rerun the IBFA install. Uncheck the RateManager Install. Then check again to see if all the libraries are listed. If they are still not listed, please log a Service Request using My Oracle Support at <u>http://metalink.oracle.com</u>.

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.

- On the server where RateManager is installed, open regedit, then navigate to the HKEY_LOCAL_MACHINE≻SOFTWARE>Insbridge>Subscribers>SUBSCRIBER_NAM E where SUBSCRIBER_NAME equals the name as entered on page 36 and given to you by Insbridge.
- 2. Select the Registry menu option and select export.



Figure 42 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.

Installing the OBI Publisher

OBI Publisher is necessary for reports. If you do not plan on using reports in RateManager, you do not need to install this program.

This step can be skipped for a SoftRater Node install only.

1. Unzip the OBI_PUBLISHER

🦁 OBI Publisher Setup	
OBI Publisher Release Notes.	
This Oracle BI Publisher (Oracle Insurance - Insbridge Install) will update the curren release to 10.1.3.4.0	
Nullsoft Install System v2.30	Cancel

Figure 43 Installing OBI Publisher

2. Click **Install**. A progress screen will be displayed.

🤯 OBI Publisher Setup	
Installation Complete Setup was completed successfully.	
Completed Show <u>d</u> etails	
Nullsoft Install System v2.30	Cancel

- 3. When complete, click **Close**.
- 4. In order for OBI Publisher to be available to users, you must start the **Insbridge Message Service**. In **IBFA**, navigate to the **Services** page.

 Insbridge Message Service
 Stop

 The Insbridge Message Service is a Message Queue Listener that will route all batched messages to an assembly (process) for execution. These processes may take resources and time to execute. Please consult with you system admin before configuring the number of listeners per process.

Message Process				
Batch Rating	View Messages	Edit Process Co	onfiguration	Purge All
If you see this message, you have not requested a listing from the selected spoke client. Clicking View Messages will provide you with a list view of the first in - first out messages that are waiting to execute.				
Insbridge Task Manager Start Stop				
The Insbridge Task Manager gives you the ability to execute daily, weekly, hourly, or by the minute.				
View Tasks (This process may take a while to execute)				
TASK	LAST RUN-DATE	START-TIME	STATUS	

Figure 44 Insbridge Services Screen

5. Next to Insbridge Message Service, click Start. After a few seconds, the buttons will refresh to indicate that the service is started.

Updates to the Insbridge Application

An update to the system can be run from the same installer. Unzip the IBRU folder on the machine where the IBRU system (IBFA and RateManager) is currently installed. Click the installer.

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 Oracle Insurance – Insbridge Rating and Underwriting file.

A Welcome screen will be displayed.

🛃 Oracle Insurance - Insbridge Rating and Underwriting 3.12.0 S 🔳 🗖 🔀		
 Oracle Insurance Insbridge Rating and Underwriting 		
It is strongly recommended that you exit all Windows programs before running this setup program.		
Click Cancel to quit the setup program, then close any programs you have running. Click Next to continue the installation.		
WARNING: This program is protected by copyright law and international treaties.		
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.		
< <u>B</u> ack <u>Next</u> > Cancel		

Figure 45 Installing Insbridge

1. Click on **Next** to continue.

2. The next screen is the Logon Information screen. Please use the Insbridge user account information that you set up earlier.

Logon Information ORACLE The following logon information is used by Insbridge. INSURANCE
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.
User Name: Insbridge Browse
Password: XXXXXXXX
Create New User
Wise Installation Wizard (R)

Figure 46 Entering User Information for Insbridge

3. Click Next to continue.

4. 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.

讨 Oracle Insurance - Insbridge Rating and Underwriting 3.12.0 S 🔳 🗖 🔀			
Select Features Please select which features you would like to			
Insbridge Rating & Underwriting RateManager IBFA ↓ Oracle BI Publisher	Feature Description: Oracle Insurance Insbridge Rating and Underwriting is a Web-based rating, rules, and underwriting system. This feature will be installed on the local hard drive. This feature requires 0KB on your hard drive. It has 2 of 2 subfeatures selected. The subfeat		
Current location: C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\			
<u>Disk Cost</u> <u>R</u> eset < <u>B</u> ack <u>N</u> ext > Cancel			

5. Click **Next** to continue.

🕏 Oracle Insurance - Insbridge Rating and Underwriting 3.12.0 S 🔳 🗖 🔀		
Ready to Install the Application Click Next to begin installation.		
Click the Back button to reenter the installation information or click Car the wizard.	icel to exit	
Wise Installation Wizard (R) < <u>B</u> ack <u>N</u> ext	Cancel	

6. 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. A progress screen will display your progress.

🥵 Oracle Insurance - Insbridge Rating and Underwriting 3.12.0 S 🔳 🗖 🔀		
Updating System The features you selected are currently being installed.		
Validating install		
Wise Installation Wizard (R)	Cancel	

7. When complete, a ReadMe Information screen will be displayed.

j	🛃 Oracle Insurance - Insbridge Rating and Underwriting 3.12.0 S 🔳 🗖 🔀		
	Readme Information Insbridge has been successfully installed. Insbridge has been successfully installed. INSURANCE		
	Microsoft Windows 2000/2003 Server A full installation of Microsoft Windows 2000 (either Server or Advanced Server) or Microsoft Server 2003 is required. The following configuration assumes that the administrator of the server to be generally familiar with managing a Windows server.		
	Components of Windows 2000/2003 Server 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 CDROM available.		
	Internet Information Services (IIS) The InsBridge Rating and Underwriting System is a web based application and 💌		
1	Vise Installation Wizard® < <u>B</u> ack <u>Finish</u> Cancel		

8. Click Finish.

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

Database Updates

Database updates can be performed in RateManager for the RM and IB_Client databases. This is the recommended way to update these databases. The SoftRater database will need to be updated on the machine where it is located.

To update the RM and IB_Client databases, log into RateManager.

Working with RateManager for the First Time

The URL for RateManager will be <u>http://INSTALLATIONSERVERNAME/RM</u>. 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.

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

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

Running Database Updates in RateManager

Database updates can be done on the IB_CLIENT database and the IBRM database. SoftRater database updates must be performed on the machine where the SoftRater database is located. No SoftRater updates are required for a new installation.

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

On the Updates screen, the current version will be highlighted and the status will be *Current*. The updates below the current version will be grayed out. These updates cannot be run again. You will receive an error message if you attempt to run a lower version update. Any version update above the current version will also be grayed out but will be available for executing.

Updates have to be installed sequentially, meaning if you are on Version 3.9, you must run the 3.10 update, then the 3.11 update and finally the 3.12 update. If you attempt to run an update that is more than one level above the current version, you will receive an error message.

- 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.

Backup	Updates		
🚯 Refresh Listing	😝 Execute Update Script 🛛 🕮 Open Update Script	🔁 Save to File	
Show updates for:	IBRM 🗸		
Script	Release Date	Database	Status
v03.12.0.00	4/30/2009	IBRM	
v03.11.0.00	11/30/2008	IBRM	Current
v03.10.0.00	8/31/2008	IBRM	
v03.9.0.00	5/19/2008	IBRM	
v03.8.0.00	6/7/2007	IBRM	
v03.7.0.00	7/6/2006	IBRM	

Figure 47 Available Updates

3. There are two ways to execute an update:

a. Directly in RateManager: This is recommended way to update a database.

- Highlight the update you want to run. Begin with the lowest update. For example, if you are going from version 3.9, you must run the version 3.10 update first. Click <u>Execute Update Script</u>. A warning message will be displayed.
- ii. Click **OK** to run the update or **Cancel** to return to the previous screen.
- iii. Do this for both the IBRM database and the IB_CLIENT database.
- b. **Use Query Analyzer:** This method should be performed by a database administrator. No warning message will be displayed if you execute scripts in the wrong order. You must know the name of the databases you are updating. Please see **Manual Updates to the IBRU Database**.

Oracle Database Setup and Update Instructions

Oracle database files are packaged in the install. The **IBSR_TEMPLATE** file is located in the Databases>Oracle>SoftRater folder. The file name is usp_IBSSR_v03.12.0.oracle.

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.

These instructions are high level and require that the setup person be a DBA.

- 1. You will need to **create the database**. Oracle Insurance does not have specific requirements, whatever requirements are deemed necessary by your company's internal standards will work. It is recommended that you included the version number or environment name if you are planning on creating more than one instance.
 - a) Create default tablespace for the Soft Rater database.
 - b) Create user IBSR & assign basic connect & resource grants.

This is next section 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 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.

Have this information ready:

- The LOBs that your company uses. You will need the ID number for each LOB.
- Your customer number.
- Location of the Insbridge files.
- Insbridge ODBC document.
- Insbridge IBFA Guide.
- Insbridge IBSS Guide.

- 1. Create the tables.
 - If a database table needs to be added, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDL folder. I.e. [INSTALL_DIR]/Insbridge/SoftRater/DDL.
 - You will have to replace the TABLESPACE name in the scripts with the tablespace name you used when you created the database.
 - On the DT tables, you will need to create one for every LOB. An example of the format is in the comments of the script. It requires the LOB ID number and the customer number.
- 2. Run the client. Use the ODBC document.
- 3. **Create the database connections to IBFA**. These instructions start on page 17 of the IBFA Guide. This is assuming that a subscriber is already in place.
- 4. Create and configure an environment in IBFA. These instructions start on page 35 of the IBFA Guide. Or if you have the environment setup already, you would only need to configure it. Be sure to test the environment.
- 5. A final test would be for a user to create a full package in RateManager. Make sure the environment you used for your new database is displayed in the drop down and the SRP is loaded.
- 6. If you are rating in WebSphere, WebLogic or JBoss using IBSS, you will need to **create and configure an environment in IBSS**. These instructions start on page 14 of the IBSS Guide. Be sure to test the environment.



If you cannot locate the DDL files or the [INSTALL_DIR]/Insbridge/SoftRater/DDL file, please contact Support for further assistance.

Location of DDL Directory

If a database table needs to be added in SoftRater for Oracle or SoftRater for DB2, the DDLs are located in the IBFA Installation Directory under the SoftRater/DDL folder. I.e. [INSTALL_DIR]/Insbridge/SoftRater/DDL. This information may be needed if you are attempting to add an LOB and receive missing table errors. Creating tables in Oracle or DB2 should be performed by a qualified DBA.

Manual Updates to the IBRU Databases

When running an update, you may be required to update the database. In the RateManager, Security, and SoftRater Database folders you will find the current database scripts. The RateManager and Security database update script will take previous IBRM and IB_CLIENT databases from version 3.11 to version 3.12 only. To go from a lower version up to 3.12, you must enter RateManager.

The IBSR database update will need to be run once, regardless of version, in the corresponding database.

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, 3.11 and 3.12 update scripts successively from there.

Manual Database Updates

Database updates are available in RateManager on the Tools > DataBase > Updates screen. To manually update a SQL Server database, you will be required to save off each update and run them in sequential order in SQL Server.

- 1. In RateManager, highlight the update you want to run. If you are going from a much lower version of RateManager, you may have to save multiple files for each database.
- Click Save to File. Your computers dialogue box will be displayed. Save the file to a location of your choice. For IBRM scripts, it is recommended that you rename the file to usp_IBRM_R0(version number).sql. For example the V3.10 update would be: usp_IBRM_R0310.00.sql. For IB_CLIENT scripts, it is recommended that you rename the file to usp_IB_CLIENT_R0(version number).sql. For example the V3.10 update would be: usp_IB_CLIENT_R0(version number).sql. For example the V3.10 update would be: usp_IB_CLIENT_R0(version number).sql.
- 3. Open Query Analyzer in SQL Server.



Figure 48 Script Viewer

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_v03.12.xx.sql is applied to the IBRM database whereas usp_IBSR_v03.12.xx.sql would be applied to your IBSR_ database.

If you prefer to manually update your databases, you can use this method to update the IBRM and IB_CLIENT databases. You must use this method to update the IBSR database.

	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 databa administrator.	ise		
NOTE When using Query Analyzer, the SQL scripts must run on each individual data as shown below.	ıbase		

1. **Open up the DB script updates** that you downloaded in RateManager. You can open in any program you want, such as Notepad. Begin with the next sequential update. For example, if you are going from V3.9 to 3.12, open 3.10 first.



Figure 49 Updating Database

- 2. Select the database you want 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 first update 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. You must run the updates in sequential order. Run each update until you run the 3.12 update. Then continue on to the next database.

NOTE The IBSR database update for 3.12 is the only update that will need to be run for the SoftRater database.

- For example, 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 first update 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. Run each update until you run the 3.12 update. Then continue on to the next database.
- 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 first update 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. Run each update until you run the 3.12 update. Then continue on to the next database.
- 14. After the scripts have been run, return to RateManager. Click **Refresh Listing**. The status should show current and the full RateManager menu should be displayed.

The updates are now properly applied and users can log back in to the system.

NOTE

NO warning messages will be displayed if you run updates in SQL Server in the wrong order. Running updates in the wrong order can cause irreparable damage to your database.
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_v03.12.xx.sql is applied to the IBRM database whereas usp_IBSR_v03.12.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 3.11 to IBRU 3.12 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. Begin with the next sequential update. For example, if you are going from V3.9 to 3.12, open 3.10 first.



Figure 50 Updating Database

- 2. Select the database you want. 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 first update from Notepad and paste onto the query screen.

NOTE The IBSR database update for 3.12 is the only update that will need to be run to SoftRater database.	or the
--	--------

5. Click **Execute**. The script will execute. Any messages will be displayed in the lower portion of the screen. You must run the updates in sequential order. Run each update until you run the 3.12 update. Then continue on to the next database.

- For example, 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 first update 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. Run each update until you run the 3.12 update. Then continue on to the next database.
- 10. For example, 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 first update 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. Run each update until you run the 3.12 update. Then continue on to the next database.
- 14. After the scripts have been run, return to RateManager. Click **Refresh Listing**. The status should show current and the full RateManager menu should be displayed

The updates are now properly applied and users can log back in to the system.

Updating the SoftRater Database from a Lower Version

For SQL Server Only: 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_v03.12.sql available in the install download. If the script is not included, then it has been run.

For an Oracle Database: Run the corresponding Oracle file.

Advanced Settings and Permission Notes

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 perform 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:

Insbridge ConfigXml Path:	D:\PROGRAM FILES\INSBRIDGE\FRAMEWORK\2.0.0\Insbridge
Messaging Server :	localhost (Secure Channel) 📃
SoftRater Server :	localhost (Secure Channel) 📃
Backup Share Folder Location:	C:\Databases
Use Insbridge Com+ Admin:	True 💌
Enforce Release Packaging:	False 💙
Batch Package Threads:	1
Minimum Login User ID Length:	3
User must change password:	90 (Days)
Show Override Date Mask:	True 💌
Allow Data Type Change:	True 💌
Inactive Session Time Out:	5.5 (hrs)
Batch Results with NewLine:	False 💙
Online Help Server:	SOUTHERN
Change Control:	On 💌

Update

Figure 51 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.

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.

Support

9

If you need assistance with an Oracle Insurance Insbridge Rating and Underwriting System product, please log a Service Request using My Oracle Support at <u>http://metalink.oracle.com</u>.

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

Index

A

Access
RateManager Settings75
Active Server Pages
Enabling11
Adding
Local Machine Administrators Group18, 19
Stored Procedures74
Administrative Permissions77
Advance Settings
RateManager75
Application Server
Subcomponents11
ASP.NET v2.0.xxxx
Enabling11
ASPNET
Permissions Required76
ASPNET Extensions
Microsoft .NET 2.0 Framework
ASPNET ISAPI Extensions
Microsoft .NET 2.0 Framework

B

Backup	
Database RateManager	75
Registry Key	57

С

Certifying
Packages in Directory54
Checklist
RateManager Installation9
SoftRater Node Installation8
Collation and Sort Order
SQL Server17
COM+ Library56
Configuring
Insbridge Framework Administrator47
Registry Editor27, 29
Converting to 3.12
From Previous Version of SoftRater74
Creating
Connection fro RateManager51
Default Rating Environment
insbridge user19
Converting to 3.12 From Previous Version of SoftRater74 Creating Connection fro RateManager51 Default Rating Environment

Local User Account	18
Customization	
RateManager	75

D

Database	
Adding Stored Procedures	74
Backup of RateManager	75
IB CLIENT	47, 48
IBRM	76
IBSR	48, 76
IBSR Permissions	41.46
Permissions	76
Requirements	37
Security	76
Server Name	49
Server MDAC	17
Undating	71 73
Users	,
DB Catalog	
DB2	55
Environment	55
Oracle	55
DB Catalog Type	00
Environment	55
DB Password	00
Environment	55
DB Schema	00
Environment	55
DR Server	00
Environment	54
DB Server Type	
Environment	54
DB Tablespace	
Environment	55
DB User	
Environment	55
db owner Permissions	41.46
DB SERVERNAME	, 54
DB2	
Supported Database	54
Default Rating Environment	
Creating	52
Definition	02
SoftRater Node	6
Directory	
Options for Environment	54
Disk Administrators SOL Server role	
Liser Account	41 46
	ч, т 0

E

E-Delivery	
IBRU	7
Required Programs	7
Edition Notice	2
Encryption	
Registry Key	.57
SoftRater Package	.57
Engine EnvDef	
Environment	.55
Engine Location	
Environment	.55
Engine Type	
Environment	.55
Environment	
DB Catalog	.55
DB Catalog Type	.55
DB Password	.55
DB Schema	.55
DB Server	.54
DB Server Type	.54
DB Habiespace	.55
DB User	.55
	.55
	.55
Engine Type	.55
Name	.54
Options	.54
SoftDatar Nada Installation	.04
	.02 52
Environment	.03
SoftPater Node Lisage	6
Sull Alei Noue Usaye	0 67
Execute Opuale Script	.07
Registry Key	57
Fytonsions	.57
	12
	12
	. 13

F

3
4
4

Η

HKEY_LOCAL_MACHINE/SOFTWARE/Ins bridge27, 29, 57 http://SERVERNAME/ibfa/......47

Ι

IB_CLIENT	
Database	50
IBFA	
Rerun	56
Start Insbridge	77
Uninstall	56
IBRM Database	54
IBRM_xxxx	
db_owner Permissions 41,	46
ibru	
SQL Server Account 37,	38
IBRU6	, 7
E-Delivery	. 7
Installing .NET 2.0 Framework Prior	12
IBRU Web Server	
SERVERNAME	47
IBRU_INSTALL_DIR	22
IBSR	76
Database 38, 41, 47,	48
IBSR Database	
db_owner Permissions 41,	46
IBSR Databases	
Loading SRPs	52
llS	
Enabling	11
Installing Microsoft .NET 2.0 Framework	(
After	12
Required10,	11
Subcomponents	10
Insbridge	
Split over Servers	17
Insbridge Framework	
Installing 18, 21,	61
Local User Account	18
Insbridge Framework Administrator	
Configuring	47
Extended Permission	77
Insbridge Inc. Com+ Administrator	
Permission on WINNT\Temp Folder	31
Insbridge Key	32
Insbridge Message Service 60,	77
Insbridge Permissions	35
Insbridge Properties	33
Insbridge RateManager	
Supported Databases	54
Insbridge Services	
Stopped	65
Insbridge SoftRater	_
Supported Databases	54
Insbridge Task Manager Service	77
insbridge user	

Permissions	34
Registry Key27	, 29
Setup	19
Installation	
RateManager Checklist	9
SoftRater Checklist	8
SoftRater Node	57
Starting	22
Installation Order	20
Installation Program	
Requirements21	, 61
Installation Requirements	
Databases	37
Installer	
Admin Rights for Installation21	, 61
Installing	
Insbridge Framework18, 21	, 61
Microsoft .NET 2.0 Framework	12

J

Java Runtime Environment	13
JRE	13

K

Known Issues	
Windows 2003 Serve	er14

L

Local Machine Administrators Group	
Adding User18, 1	9
Local User Account	
Insbridge Framework1	8
LOCALHOST	
Engine Location5	55

M

Microsoft .NET 2.0 Framework	12
Microsoft Message Queue	31
Microsoft Message Queuing Service	12
Microsoft SQL Server	16
Microsoft Windows 2000	10
Missing	
COM+ Library	56
Mixed Mode Authentication	
Sql Server	16
MSMQ	31

N

Name	
Environment	54
Network DTC	
Windows 2003 Server Issues	15
Node Installation	
SoftRater	57
NT Fibers	
SQL Server	17

0

. 71
. 54
. 54
. 55

Р

Package Location	
Environment	54
Part Numbers	
E-Delivery	7
Password	
Errors to COM+ Apps	
Local User Account	
PDF Files	
Creating	13
PDF Reader	
E-Delivery	7
Permissions	
db_owner	41, 46
Extended	
Insbridge Key	
Required ASPNET	
Validating on Directory.	54
db_owner Extended Insbridge Key Required ASPNET Validating on Directory .	

Q

Query Analyzer		
Updating Database	71,	73

R

RateManager	
Accessing Adavance Settings	75
Advance Settings	75
Checklist for Installation	9
Creating a Connection	51

Default Rating Environment5 Disk Administrators SQL Server role4	52 1,
	2
PDF Files	3
Registry Key)/
Read / Write Access	
ASPNE17	6
Read Access	
ASPNET7	'6
regedit5	57
Registry Editor	
Configuring27, 2	29
Registry Key5	57
Import5	57
insbridge user27, 2	29
Requirements	
Installation Program21, 6	51
Internet Information Services	1
Microsoft Message Queuing Service1	2
Microsoft Windows 20001	0
Permissions ASPNET7	'6
Windows Server1	0
Rerun	-
IBFA 5	6
Running	
Database Undates 6	37
Balabaoo opaaloo	

S

sa account
SQL Server Enterprise Manager38, 41
Script
Executing Update67
Viewing Update71
Security
Database76
Server
Admin Permissions77
Insbridge Framework Name49
SERVERNAME
Replacing47
Servers
Insbridge Split Over17
Service
Insbridge Task Manager77
Settings
SQL Server16
Shared
IBRU System19
SMTP Service
IIS Requirement10, 11
SoftRater
Checklist for Installation
Converting to 3.1274
IBSR

SoftRater Node Definition SoftRater Node Installation Environments SoftRater Package Encryption	6 57 52 57
SQL Scripts Query Analyzer	73
SQL Server Collation and Sort Order Mixed Mode Authentication NT Fibers Replacing Name Requirements Residing on Separate Host Supported Database User Accounts	17 16 17 54 16 16 54 46
SQL Server Enterprise Manager sa Privileges	41
Subscriber Information for Database Supported Databases Supported Databases Insbridge RateManager Insbridge SoftRater System DSN Name	49 54 54 54
	54

T

Types	
Environment	53

U

Uninstall	
IBFA	56
Unzip Utility	
E-Delivery	7
Updates	
Running	67
Viewing	67
Updating Database	. 71, 73
User	
Access to Services	77
Local User Account	18
Windows Temp Folder Access	31
User Accounts	
SQL Server	. 41, 46
Users	
Database Requirements	37

Local, ASPNET		;
Permissions for	Insbridge Folder Location	
		ŀ

V

Validating	
COM+ Library	55
Viewing	
Database Updates	67

W

Web Server	
IBRU	49
Java Runtime Environment	13
MDAC	17
Windows 2003 Server Known Issues.	14
Windows Server	
Components	10
WINNT\Temp Folder	
MSMQ	31