

# Oracle® Policy Modeling

Installation Guide

Release 10.4.1

**E36314-01**

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The Oracle Policy Modeling Installation Guide contains information relating to the system requirements, installation, deployment and ongoing management of the Oracle Policy Modeling software.

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# System Requirements

This section describes the system requirements for Oracle Policy Modeling (OPM) provided for the Microsoft Windows platform.

## Oracle Policy Modeling Requirements

The following are the minimum requirements for the Oracle Policy Modeling application.

**Note:** The minimum recommended screen resolution for Oracle Policy Modeling is 1024 by 768 pixels.

Requirement	Versions Supported	CPU
Operating System	<ul style="list-style-type: none"> <li>▪ Microsoft Windows XP SP3</li> <li>▪ Microsoft Windows Vista SP1 or later</li> <li>▪ Microsoft Windows 7</li> </ul>	<p>32-bit (x86) only</p> <p>32-bit (x86) or 64-bit (x64)</p>
Productivity Suite	<ul style="list-style-type: none"> <li>▪ Microsoft Word 2003*, 2007</li> <li>▪ Microsoft Excel 2003*, 2007</li> <li>▪ Microsoft Word 2010</li> <li>▪ Microsoft Excel 2010</li> </ul>	<p>32-bit (x86)</p> <p>32-bit (x86) or 64-bit (x64)</p>
Version Control Integration	<ul style="list-style-type: none"> <li>▪ Subversion 1.6 via pre-installed adapter</li> <li>▪ Subversion 1.5, 1.6 via PushOK MS SCC API adapter</li> <li>▪ Microsoft Visual SourceSafe 2005 and 2008</li> <li>▪ Microsoft Team Foundation Server 2005, 2008 and 2010</li> <li>▪ IBM Rational ClearCase 7.0 and 7.1</li> </ul>	
Java Runtime	<ul style="list-style-type: none"> <li>▪ Oracle Java 2 Standard Edition 5 or 6</li> </ul>	
.NET Framework	<ul style="list-style-type: none"> <li>▪ Microsoft .NET Framework 2.0 SP2, 3.0 SP2, or 3.5 SP1</li> </ul>	

**\*Notes:**

What-if Analysis in Excel requires Office 2007 or later

Support for Microsoft Office 2003 will cease no later than Oracle Policy Modeling version 11.0.

## Subversion

An integrated command line instance of Subversion 1.6 may be installed as part of the Oracle Policy Modeling installation. Alternatively, if you wish to use a different Subversion installation, several options can be found at <http://subversion.apache.org/packages.html#windows>. Note that if you do wish to use your own command line Subversion installation, it must be on the system path to integrate correctly with Oracle Policy Modeling.

# Install Oracle Policy Modeling

Before commencing the installation, first verify that the target computer meets the [Oracle Policy Modeling System Requirements](#).

## Components

The following components will be installed when you run the Oracle Policy Modeling installation wizard:

- Oracle Policy Modeling
- Oracle Policy Modeling Standalone Debugger
- Oracle Policy Modeling Standalone Regression Tester
- Oracle Policy Modeling Rapid Language Support Tool

The following components are optional, but will be installed by default:

- Oracle Policy Modeling User's Guide (US-English)
- Oracle Policy Automation Developer's Guide (US-English)
- Subversion client command line utility

The following components are optional, and will only be installed if selected during installation:

- Oracle Policy Modeling User's Guide (Brazilian Portuguese)
- Oracle Policy Modeling User's Guide (French)
- Oracle Policy Modeling User's Guide (Italian)
- Oracle Policy Modeling User's Guide (Simplified Chinese)
- Oracle Policy Modeling User's Guide (Spanish)

## Structure

Path	Purpose
Program Files\Oracle\Policy Modeling	This is the default install folder.  Policy Automation Release Notes and Policy Modeling Installation Guide will be installed in this folder.
<root>\bin	ALL binaries and dependencies, includes jar and dll of previously separate folders
<root>\bin\registry	Policy Modeling user settings registry template file
<root>\bin\subversion	Integrated Subversion installation, if selected during Oracle Policy Modeling installation
<root>\bin\welcome	Default welcome page used by the Policy Modeling Debugger
<root>\EmbeddedTomcat	Embedded version of Apache Tomcat v5.5.34
<root>\examples	Example rulebase projects
<root>\help\api	API documentation
<root>\help\opm\help_<languageCode>	Oracle Policy Modeling User's Guide. Each sub-directory relates to the languages chosen during installation.
<root>\help\run	English (US) version of Oracle Policy Automation Developer's Guide

Path	Purpose
<root>\language\Bundles	Language support files for Microsoft Word and Excel localization
<root>\language\<languageName>	Language parser for <languageName>. May be either a fully productized syntactic parser or an RLS non-syntactic parser. For OPA 10.4 the syntactic parsers include English, Brazilian Portuguese, Danish, Dutch, European Portuguese, Finnish, French, German, Hebrew, Italian, Japanese, Korean, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese and Turkish.
<root>\licenses	Relevant licenses associated with Oracle Policy Modeling and related packages
<root>\templates	All templates used by the Policy Modeling application
<root>\templates\determinations-server	Template files for Oracle Determinations Server (both Java and .NET)
<root>\templates\document-generation-server	Template file for the shared document generation server used by Oracle Determinations Server and Oracle Web Determinations
<root>\templates\plugins	Plugins for optional functionality, such as the legacy document generation plugin for Oracle Web Determinations
<root>\templates\RLS	Template files for Rapid Language Support (RLS)
<root>\templates\web-determinations	Template files for Oracle Web Determinations (both Java and .NET)

**Note:**

The user account under which the installation program is being run must have administrative privileges on the target machine.

Installation of Oracle Policy Modeling is done as follows:

- [Step 1 - Download the Oracle Policy Modeling Software](#)
- [Step 2 - Prepare to install Oracle Policy Modeling](#)
- [Step 3 - Install Oracle Policy Modeling](#)
- [Step 4 - Installation verification](#)
- [Post Installation Troubleshooting](#), if required

## Step 1 – Download the Oracle Policy Modeling Software

1. Go to <http://edelivery.oracle.com/>
2. Choose *English* (if not already selected) and click **Continue**.
3. Enter your name, company, email and country and agree to the Trial License Terms and Export Conditions.
4. Under Media Pack Search, choose *Oracle Policy Automation* and the required platform (this list will change when the product pack is changed). Click **Go**.
5. Depending on the search, either the results will appear or you will proceed directly to the next step if there is a single match only. Select the media pack you wish to download and click **Continue**.

Select a Product Pack:  ▼ ⓘ

Platform:  ▼

**Results**

Select	Description	Release ▼	Part Number	Updated	# Parts / Size
<input type="radio"/>	<a href="#">Oracle Policy Automation Connector for Siebel (v10.2) Media Pack for Microsoft Windows (32-bit)</a>	10.2.0.1010.0	B62214-01	JAN-26-2011	1 / 69M
<input checked="" type="radio"/>	<a href="#">Oracle Policy Modeling (v10.2) Media Pack for Microsoft Windows</a>	10.2.0.110.0	B61505-01	DEC-06-2010	1 / 173M
<input type="radio"/>	<a href="#">Oracle Policy Automation for Java (v10.2) Media Pack</a>	10.2.0.110.0	B61507-01	DEC-06-2010	1 / 44M
<input type="radio"/>	<a href="#">Oracle Policy Automation for .NET (v10.2) Media Pack for Microsoft Windows</a>	10.2.0.110.0	B61509-01	DEC-06-2010	1 / 48M
<input type="radio"/>	<a href="#">Oracle Policy Automation Connector for Siebel (v10.1) Media Pack for Microsoft Windows (32-bit)</a>	10.1.2.1001.0	B59090-03	OCT-19-2010	1 / 65M
<input type="radio"/>	<a href="#">Oracle Policy Automation for Java (v10.1) Media Pack</a>	10.1.0.27.0	B61576-01	DEC-09-2010	1 / 33M
<input type="radio"/>	<a href="#">Oracle Policy Automation for .NET (v10.1) Media Pack</a>	10.1.0.27.0	B61578-01	DEC-09-2010	1 / 42M
<input type="radio"/>	<a href="#">Oracle Policy Modeling (v10.1) Media Pack for Microsoft Windows (32-bit)</a>	10.1.0.27.0	B61595-01	DEC-09-2010	1 / 158M
<input type="radio"/>	<a href="#">Oracle Policy Automation Connectors for Siebel (v9.4) Media Pack for Microsoft Windows (32-bit)</a>	9.4.2.0.0	B53457-03	JUL-13-2009	2 / 18M
<input type="radio"/>	<a href="#">Oracle Policy Modeling (v9.4) Media Pack for Microsoft Windows (32-bit)</a>	9.4.1.0.0	B53455-02	APR-13-2009	2 / 240M
<input type="radio"/>	<a href="#">Oracle Policy Automation (v9.4) Media Pack</a>	9.4.1.0.0	B53456-02	JUL-08-2009	2 / 48M
<b>Total: 11</b>					

- Once a media pack is selected, you will be shown a list of parts available for download.



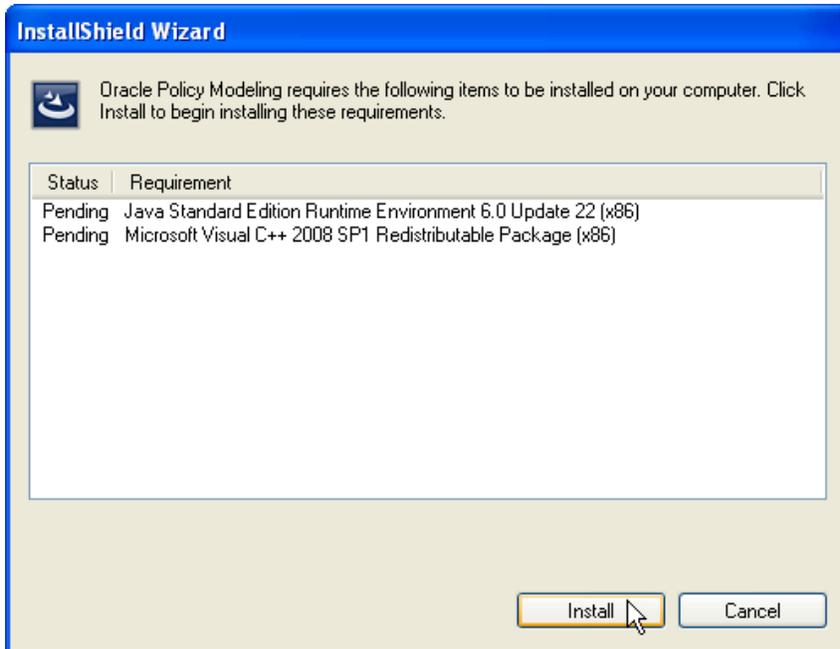
The screenshot shows a web interface for downloading Oracle Policy Modeling (v10.2) Media Pack v1 for Microsoft Windows. At the top, there are two buttons: 'Readme' and 'View Digest'. Below these is a table with columns for 'Select', 'Name', 'Part Number', and 'Size (Bytes)'. A single row is visible with a 'Download' button in the 'Select' column, the name 'Oracle Policy Modeling v10.2.0.110.0', part number 'V23889-01', and size '173M'. At the bottom of the table, a summary row indicates 'Total: 1'.

Select	Name	Part Number	Size (Bytes)
<input type="button" value="Download"/>	Oracle Policy Modeling v10.2.0.110.0	V23889-01	173M
<b>Total: 1</b>			

- Click the **Download** button to the left of the part you wish to download.
- Select either *Open* or *Save* on the presented dialog.

## Step 2 – Prepare to Install Oracle Policy Modeling

Run the **setup.exe** file. If any of the pre-requisites are not currently installed, you will be prompted to begin installation for each missing component:

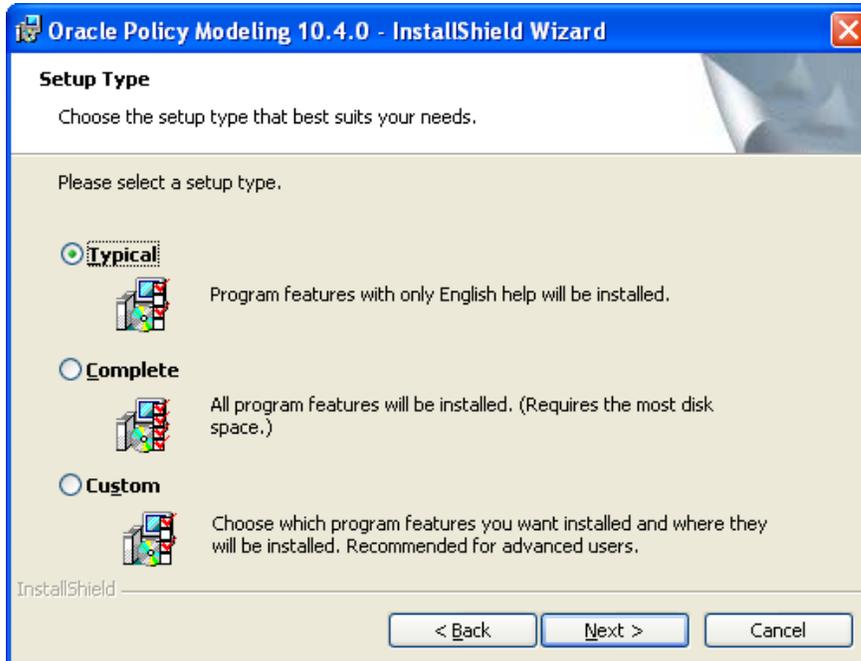


Once all pre-requisites are installed, the *Welcome* page is displayed:

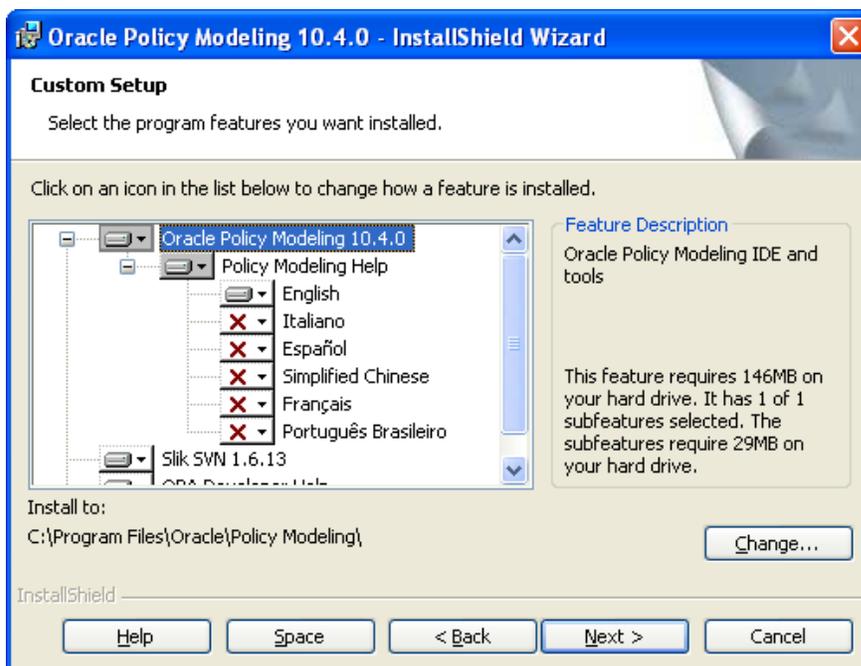


## Step 3 – Install Oracle Policy Modeling

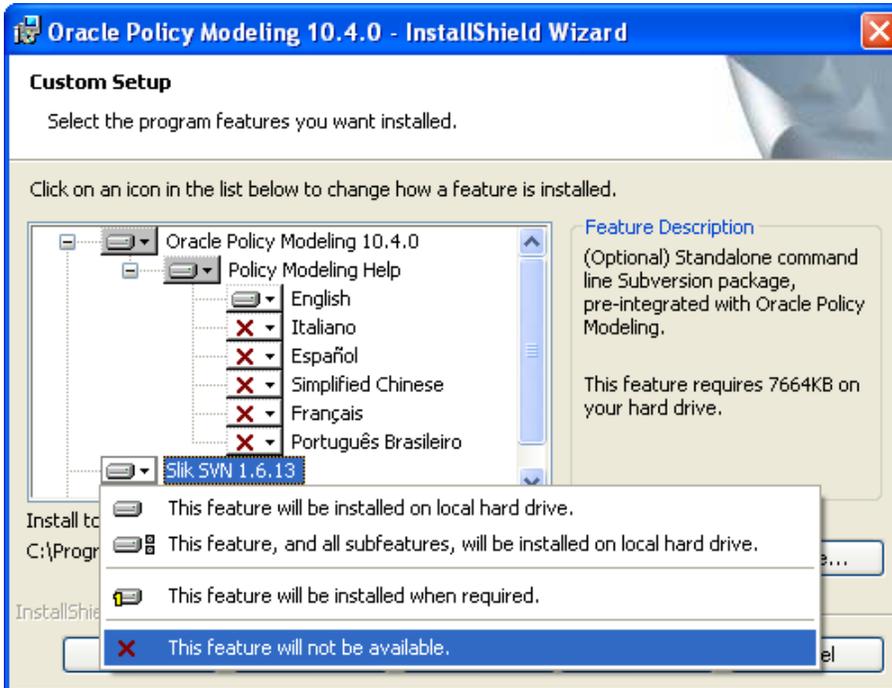
1. Click **Next** on the *Welcome* page to progress to the *Setup Type* page:



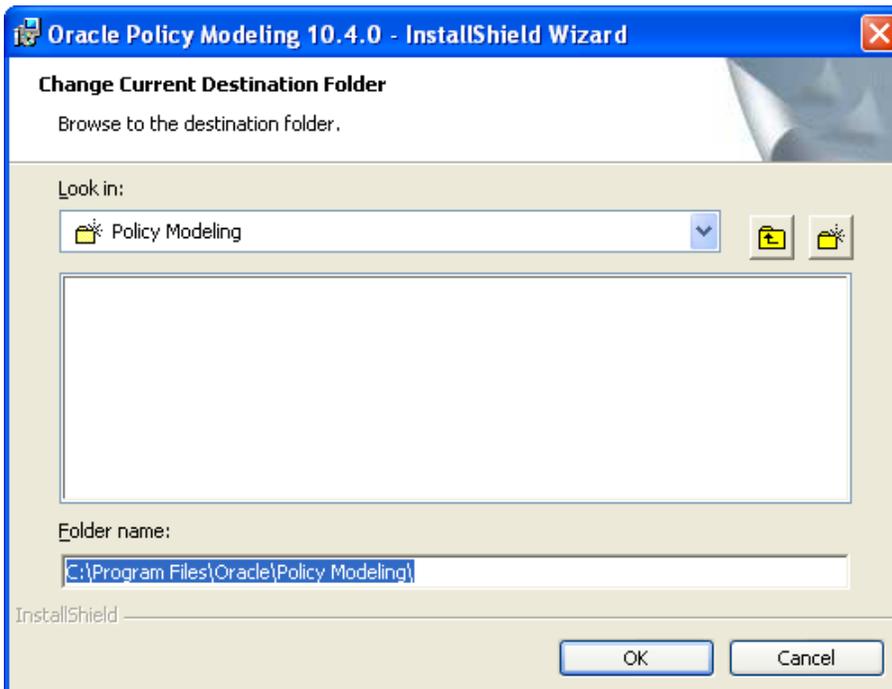
2. Choose from the default Setup Type of **Typical** to install Oracle Policy Modeling with English-only user help, **Complete** to install Oracle Policy Modeling with all localized user help, or **Custom** if you wish to change the location or components of your install from the default. If Custom is chosen, click **Next** to display the *Custom Setup* page:



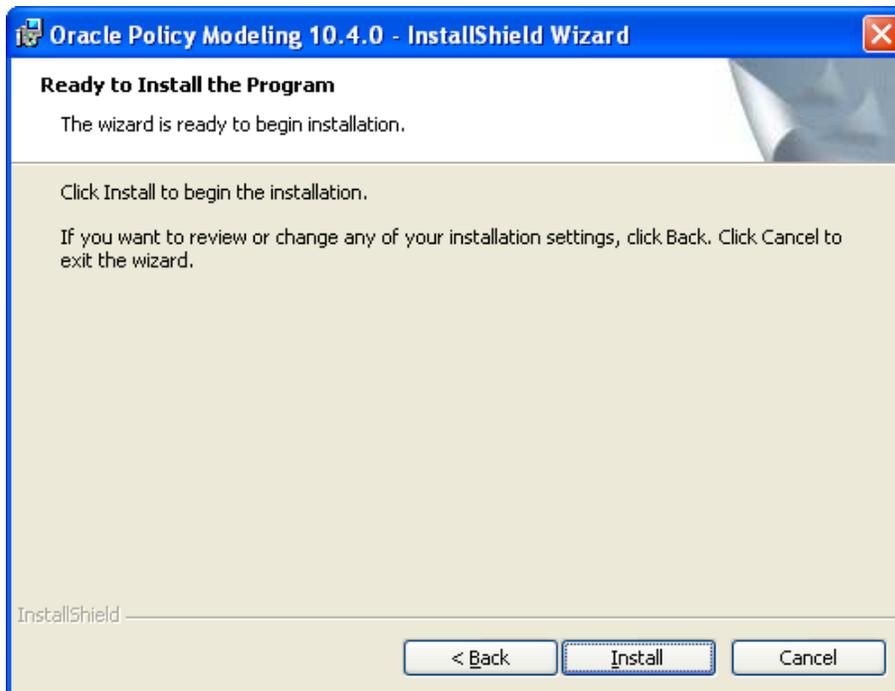
- To change the components installed, select the appropriate option next to the relevant component. For example, if you do not wish to install the integrated command line Subversion component (*Slik SVN 1.6.13*) with Oracle Policy Modeling, click the arrow beside this component and select **This feature will not be available**:



- To change the installation location, click the **Change...** button to set a different *Install to:* address:



5. Change the folder name and click **OK**.
6. Click **Next**; you are now presented with the *Ready to Install the Program* confirmation page:



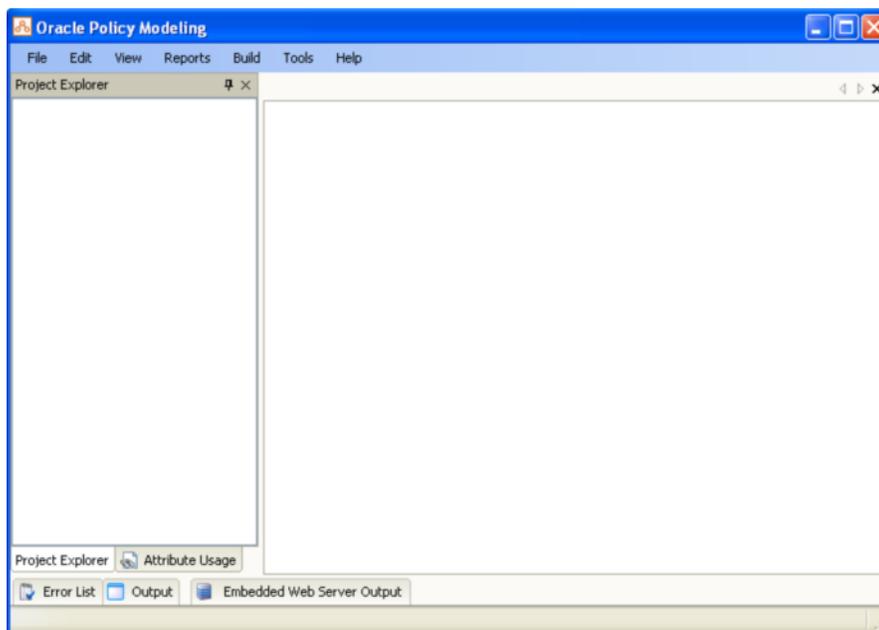
7. If you wish to change anything in your install settings, click **Back** to return to the previous pages, otherwise click **Install** to commence the installation.

## Step 4 – Installation Verification

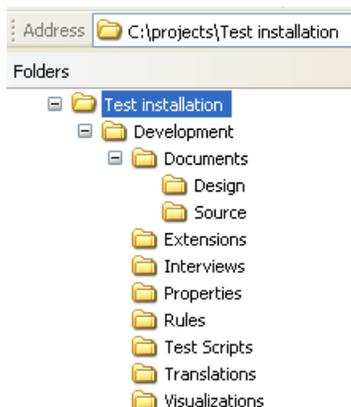
The following steps will take you through a basic verification process to ensure your Oracle Policy Modeling installation is functioning correctly.

Further information on any of the steps is available from the Oracle Policy Modeling User's Guide, which can be accessed from the **Help | Oracle Policy Modeling User's Guide** option within Oracle Policy Modeling, or from the Start menu at **Start | All Programs | Oracle Policy Modeling | Oracle Policy Modeling User's Guide**.

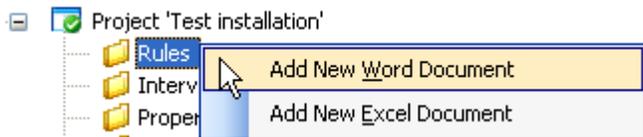
1. Select **Start | All Programs | Oracle Policy Modeling | Oracle Policy Modeling 10** to run Oracle Policy Modeling. Verify that Oracle Policy Modeling opens.



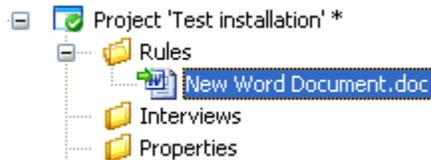
2. Select **File | New Project** to create a new project (see the User's Guide topic *Create, modify or delete a project* for further information). Verify that a project folder and project files are created in the specified location on the hard drive.



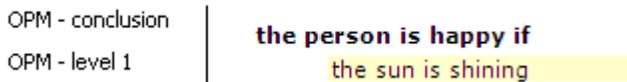
3. Add a new Word rule document in the Rules folder (see the User's Guide topic *Add, rename or remove a rule document* for further information).



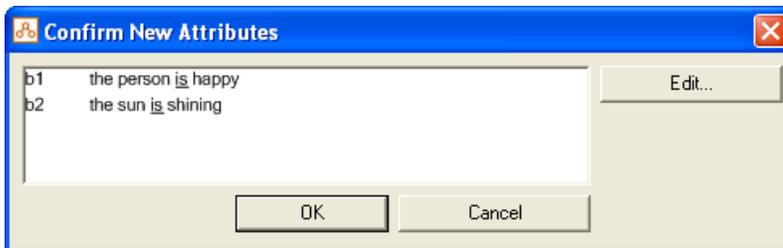
Verify that the document has been added to the project.



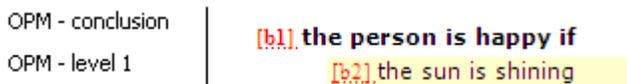
4. Open the Word rule document in Microsoft Word by double-clicking the document in the Project Explorer. Create a simple rule structure (see the User's Guide topics *Edit a rule document* and *Write rules in Word* for further information). Verify that Oracle Policy Modeling styles (eg Conclusion and Level 1 styles) can be applied using the Oracle Policy Modeling tab/toolbar.



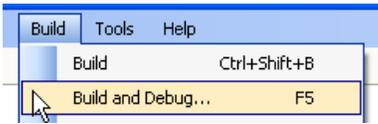
5. Compile the rules by clicking the **Compile** button on the Oracle Policy Modeling tab/toolbar (see the User's Guide topic *Compile rules and correct errors* for further information). Verify that the **Confirm New Attributes** dialog box opens.



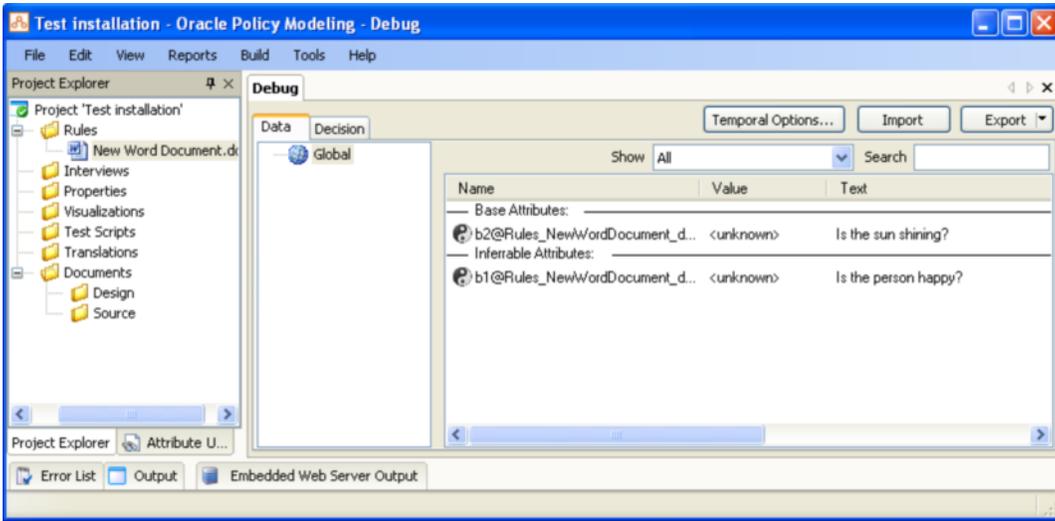
Click **OK**. Verify that attribute IDs have been assigned to the attributes.



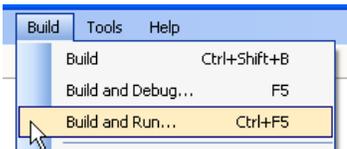
6. Select **Build | Build and Debug** in Oracle Policy Modeling to debug the compiled rules.



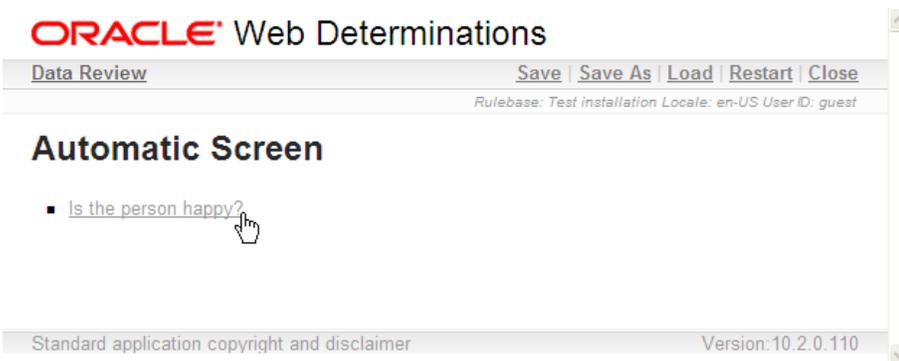
Select the option to build **Without Screens**, and click **OK** (see the User's Guide topic *Debug a rulebase* for further information).  
Verify that the debugger opens in the **Debug** tab of the main window.



7. Select **Build | Build and Run** in Oracle Policy Modeling to run the rules in Oracle Web Determinations.



Select the **Run with Oracle Web Determinations** option and click **Run** (see the User's Guide topic *Test an interview or screen flow* for further information).  
Verify that Oracle Web Determinations opens in a browser window.



Installation verification is now complete.

# Post Installation Troubleshooting

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If you experience problems with the Oracle Policy Modeling installation, or errors following installation, please firstly ensure the following:

- That you are installing Oracle Policy Modeling using an account with local administrator access,
- That your system meets the Oracle Policy Modeling [System Requirements](#), and
- That all [pre-requisites](#) have been correctly installed.

Some issues commonly encountered are listed below. If you are experiencing a problem not covered here, for further information and support please see the following:

- The **Oracle Policy Automation knowledge base** at [support.oracle.com](http://support.oracle.com). You will require Oracle customer details to access this area. Select the Knowledge area in the top menu, browse in the product list to *More Applications | Oracle Haley | Policy Automation*, and select *Oracle Policy Modeling* or the appropriate program. From here you can browse or search on knowledge base articles, including technical 'how to' instructions, known issues and their workarounds, and product announcements.
- The **Oracle Policy Automation Discussion Forum** at <http://forums.oracle.com/forums/forum.jspa?forumID=828>

## Issue:

### **Error displayed when Oracle Policy Modeling starts and Office Add-ins fail to work**

#### Problem Description

Whenever a user starts Oracle Policy Modeling they are presented with either of the following error messages:

*"Oracle Policy Modeling has detected access issues that prevents Microsoft Word and Microsoft Excel add-ins from functioning correctly.*

*Please start Oracle Policy Modeling with administrator privileges to allow this problem to be automatically resolved."*

*"Oracle Policy Modeling has detected security issues that prevents Microsoft Word and Microsoft Excel add-ins from functioning correctly.*

*Please start Oracle Policy Modeling with administrator privileges to allow this problem to be automatically resolved."*

Then the Oracle Policy Modeling Microsoft Word and Microsoft Office add-ins are either not present or fail to function correctly.

#### Cause

This issue is caused by a Microsoft bug which manifests if the Microsoft .NET Framework version 2.0 is installed subsequent to Microsoft Office. Essentially, in these circumstances Microsoft Word and Microsoft Excel are placed on a 'lockback' list which prevents .NET 2.0 add-ins from being used until that lockback is removed. For more information see:

<http://msdn.microsoft.com/msdnmag/issues/06/03/clrinsideout/default.aspx?loc=&side=true>  
<http://support.microsoft.com/kb/907417>

Oracle Policy Modeling attempts to rectify this problem by automatically detecting and removing the lockback, thereby allowing the Oracle addins to function correctly. However, certain user profiles do not have enough permissions to remove the lockback and hence the error message that is displayed.

## Solution

### For Users of Microsoft Windows Vista or Microsoft Windows 7

This issue can be resolved by choosing to start Oracle Policy Modeling with administrator rights.

### For Users of Microsoft Office 2003

This issue can be resolved by installing the Microsoft Office 2003 updated KB907417. To do this, go to <http://support.microsoft.com/kb/907417> and follow the instructions set out there.

### For Users of Microsoft Office 2002 (XP)

Unfortunately, Microsoft has not issued a patch for Office 2002 to correct this issue. However this issue can be corrected by running Oracle Policy Modeling with elevated permissions and allowing it to remove Word and Excel from the lockback list. To do this:

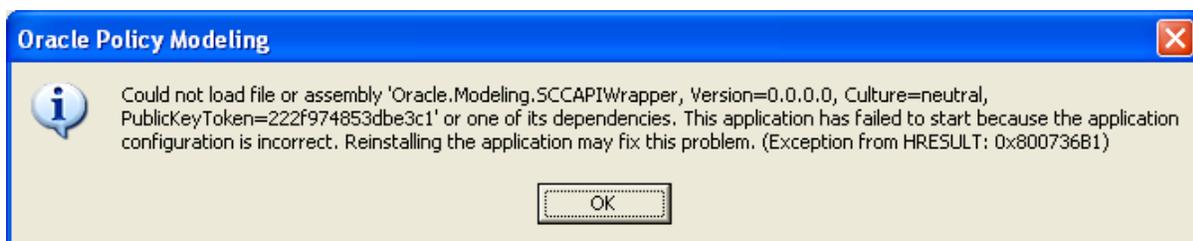
1. Log into the machine with Oracle Policy Modeling installed using an account which has either Power User or Administrator privileges on that machine.
2. Start Oracle Policy Modeling. Office Rules should start without displaying the error message.
3. Once Oracle Policy Modeling has fully started, it should have detected and removed the lockback and is now ready for use by users with restricted permissions.

## Issue:

**Could not load file or assembly 'Oracle.Modeling.SCCAPIWrapper, Version=0.0.0.0, Culture=neutral, PublicKeyToken=222f974853dbe3c1' or one of its dependencies.**

## Problem Description

Whenever a user opens Oracle Policy Modeling they are presented with the following error message:  
*"Could not load file or assembly 'Oracle.Modeling.SCCAPIWrapper, Version=0.0.0.0, Culture=neutral, PublicKeyToken=222f974853dbe3c1' or one of its dependencies. This application has failed to start because the application configuration is incorrect. Reinstalling the application may fix this problem. (Exception from HRESULT: 0x800736B1)"*



Then Oracle Policy Modeling appears without any menu items. Closing the window raises a similar error message and prevents the application exiting.

## Cause

This is due to the pre-requisite C++ runtime not being installed.

Oracle Policy Modeling requires system files that are not part of the operating system. These files are freely distributed by Microsoft as "Microsoft Visual C++ 2008 Redistributable Package".

## Solution

Ensure that when you install Oracle Policy Modeling that you agree to install any missing pre-requisites when prompted.

The installer for "Microsoft Visual C++ 2008 Redistributable Package" can be found in the Oracle Policy Modeling installation file set. Look in the directory "ISSetupPrerequisites\vc redistrib\_x86" and run the file "vc redistrib\_x86.exe".

## Issue:

**Error when creating or editing RLS parsers – Access to the path '<filename>' is denied.**

## Problem Description

For a user using the Oracle Policy Modeling RLS Tool:

1. When the user attempts to create a new RLS parser, upon choosing the "Create" button they are presented with the following error message:

*"An RLS configuration could not be created. Access to the path '<filename>' is denied.*

2. When the user edits an existing RLS parser, upon choosing the "Save" button they are presented with the following error message:

*"Access to the path '<filename>' is denied.*

In either scenario, **<filename>** refers to the path to an RLS file on the user's local machine.

Additional error messages may be displayed when exiting Oracle Policy Modeling RLS Tool.

## Cause

Languages parsers are by default installed under the "C:\Program Files\Oracle\Policy Modeling\language" folder. Access to the "C:\Program Files" directory may be limited by group policies enforced by the corporate IT department, to protect users from inadvertently modifying the applications installed to their local machine.

When the Oracle Policy Modeling RLS Tool attempts to add or modify files for a language parser, the system will consider this to be an attempt to modify program data, and prevent this change from occurring.

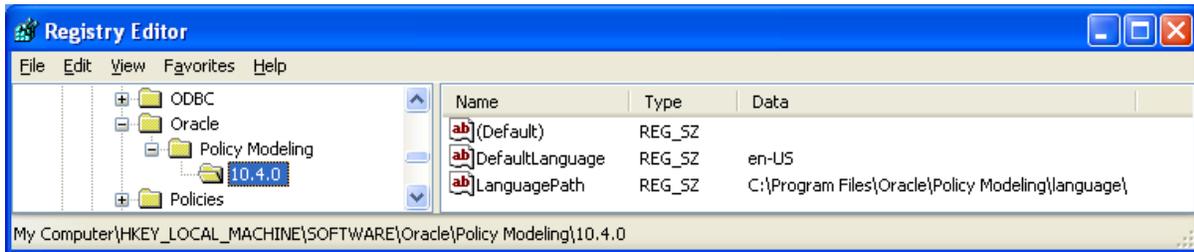
## Solution

Since this issue will only occur if restrictions are placed on modifying files under the Program Files directory, you must log onto the machine as an administrator to resolve this problem.

The language folder may be moved to a location that is not restricted by group policies; for example, "C:\Oracle\Policy Modeling\language".

Ensure Oracle Policy Modeling is not currently active before moving the "language" folder. To allow Oracle Policy Modeling to find the "language" folder, you must update the file path specified for the entry "LanguagePath" in the registry:

HKEY\_LOCAL\_MACHINE\SOFTWARE\Oracle\Policy Modeling\10.4.0



An alternative solution is to re-install Oracle Policy Modeling to a location that is not restricted by group policies; for example, "C:\Oracle\Policy Modeling".

## Issue:

**Error when upgrading an existing project in Oracle Policy Modeling – The server encountered an internal error () that prevented it from fulfilling this request. Could not load rulebase <name>. Unexpected schema version in screens file**

## Problem Description

This error occurs when upgrading an existing project in Oracle Policy Modeling and an old version of Oracle Web Determinations is being used.

## Solution

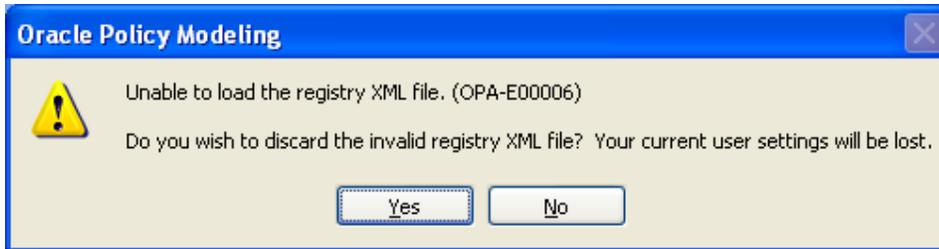
Upgrade the Oracle Web Determinations deployment.

Issue:

**Error when starting Oracle Policy Modeling after it had previously terminated “ungracefully”.**

Problem Description

Following an ungraceful termination of Oracle Policy Modeling, the next time it is started, the message shown below is displayed.



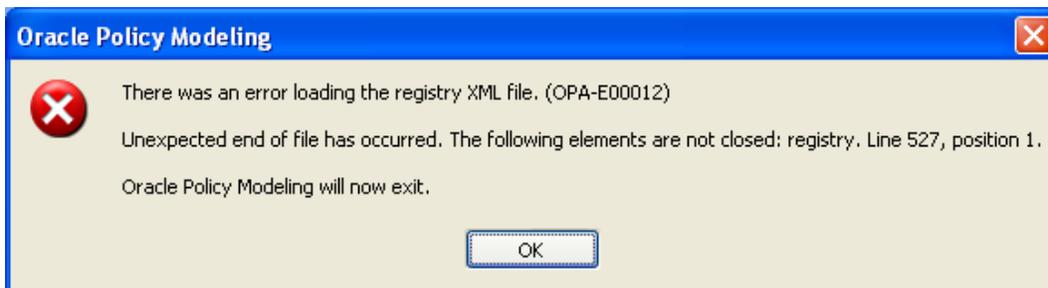
Cause

The previous time Oracle Policy Modeling was used, it terminated “ungracefully” resulting in a corruption of the registry XML file.

Solution

If Oracle Policy Modeling starts and the message shown above is displayed, this indicates that the registry XML file has been corrupted. Click on the **Yes** button to continue opening the application, noting that the corrupt file will be removed and a new “clean” registry file generated; this means that all previous user settings will be ignored and you will see the default look and feel, in US English, without any history of the previously opened project. Additionally, all of the settings that appear under **Tools -> Options** will be reset to their default values.

If you click on the **No** button, then the error below will be displayed (the actual error details may be different) and Oracle Policy Modeling will be terminated.

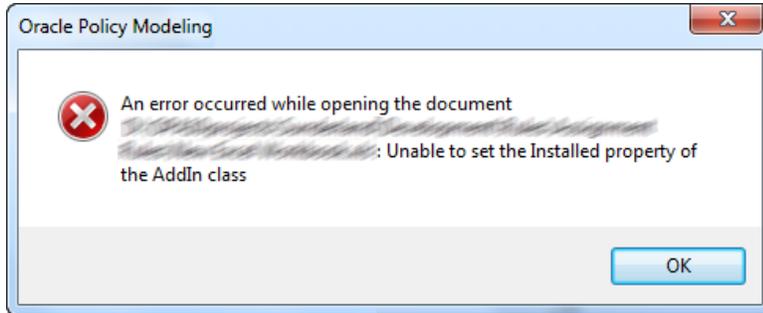


## Issue:

**Opening a workbook in Microsoft Excel 2007 from within Oracle Policy Modeling returns the error “Unable to set the Installed property of the Addin class”**

## Problem Description

When a rule project inside Oracle Policy Modeling contains an Excel workbook, attempting to open that workbook results in the following error:



## Cause

Excel has rejected the request from Oracle Policy Modeling to activate the Oracle Policy Modeling AddIn for Excel.

## Solution

The following is a possible workaround that will enable you to manually activate the Oracle Policy Modeling AddIn for Excel:

- 1) Open the Excel document outside Oracle Policy Modeling.
- 2) Select *Excel Options* from the Office Menu (circle at top left). Select *Add-Ins*, then find *Manage: Excel Add-Ins*, and click on **Go...**
- 3) Place a tick in the Oracle Policy Modeling Excel 2007 check box (if it is already ticked, try un-ticking, clicking **OK**, and ticking it again).
- 4) Click on the **OK** button.
- 5) Try opening the workbook again in Oracle Policy Modeling.

If the Oracle Policy Modeling AddIn for Excel does not appear in step 3, you should be able to locate it in the *templates* directory of the Oracle Policy Modeling installation. The default location is:

C:\Program Files\Oracle\Policy Modeling\templates\Oracle Policy Modeling Excel 2007.xlam

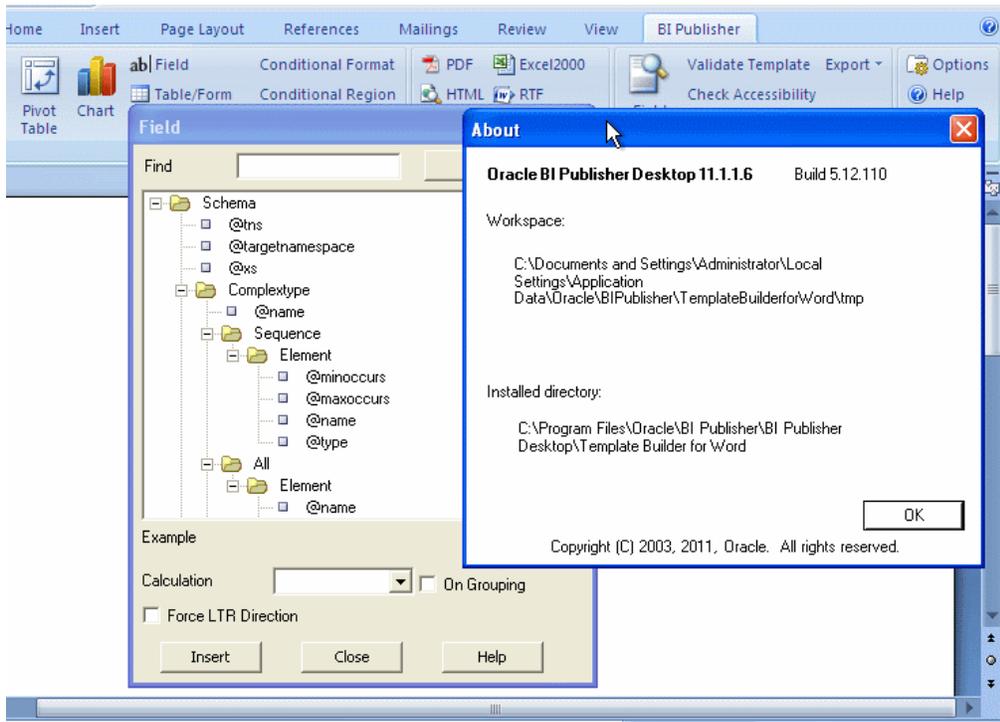
Issue:

**When designing an RTF template using xml schema as data source, the data is loaded successfully but the resulting structure is incorrect.**

Problem Description

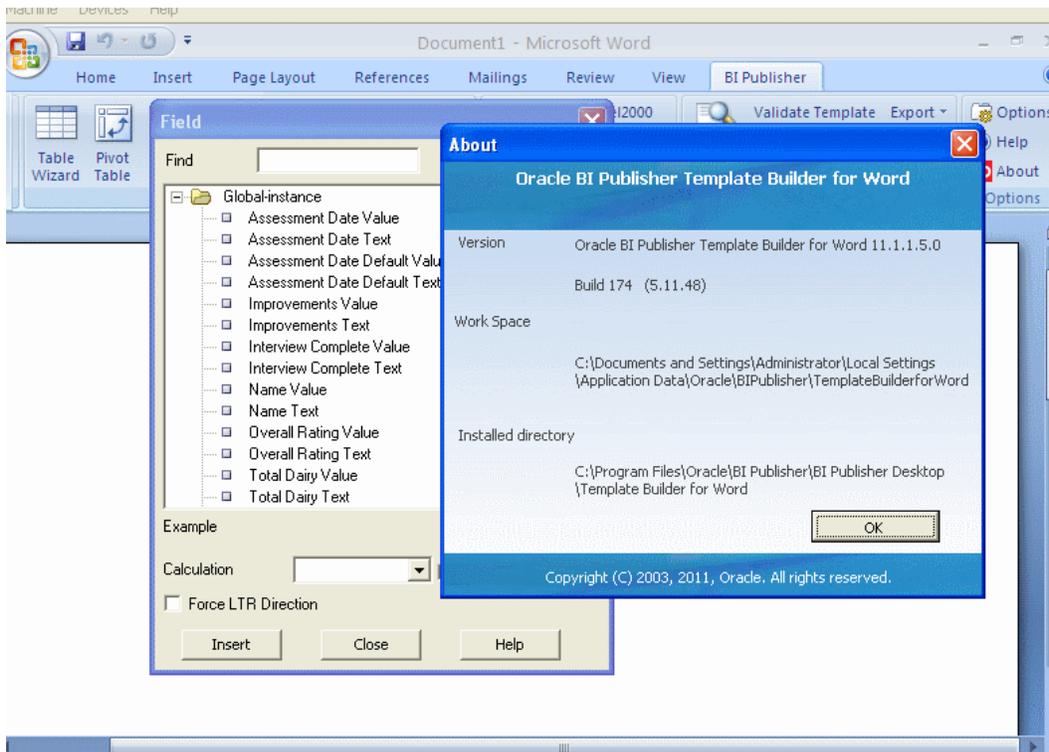
Load the *Interview Summary Schema.xsd* (see the *HealthyEating* rulebase in the examples folder) and open the *Insert Field* dialog.

The following is being displayed in BI Publisher Template Builder for Word version 11.1.1.6.0:

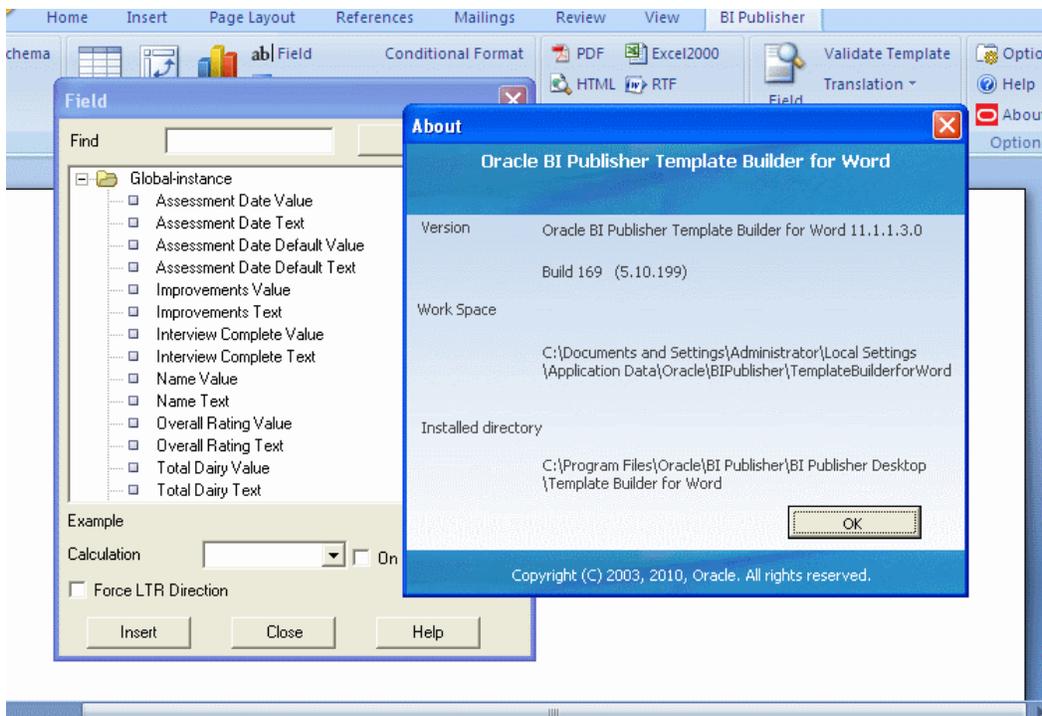


However, the expected output is as follows:

**Insert Field dialog in v11.1.1.5.0:**



**Insert Field dialog in v11.1.1.3.0:**



## Cause

Incompatibility with Oracle BI Publisher Template Builder for Word version 11.1.1.6.0.

## Solution

It is recommended that you use either Oracle BI Publisher Template Builder for Word version 11.1.1.3.0 or version 11.1.1.5.0 with Oracle Policy Modeling.

For those using BI Publisher Template Builder 11.1.1.6.0, a workaround is to load sample xml data generated by Oracle Web Determinations. For more details, please refer to the *Generate the sample data* topic in the *Oracle Policy Modeling Help*.