

Oracle Insurance IBRU BatchManager Guide

Version 3.12

July 2009

Oracle Insurance Insbridge Rating and Underwriting BatchManager User Guide

Version 3.12

Part #E15003-01

Library #E15014-01

Formerly P01-719-13

July 2009

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Contents

FIGURES.....	4
PREFACE.....	5
<i>Audience.....</i>	<i>5</i>
<i>Notational Conventions</i>	<i>5</i>
<i>Navigating BatchManager.....</i>	<i>6</i>
<i>Basic Safety Precautions</i>	<i>6</i>
<i>Inactivity/ Timeout</i>	<i>6</i>
<i>Internet Explorer Settings.....</i>	<i>6</i>
<i>Clearing Temporary Files.....</i>	<i>6</i>
<i>Additional Information.....</i>	<i>7</i>
<i>Manual History</i>	<i>7</i>
CHAPTER 1	8
INTRODUCTION TO BATCHMANAGER.....	8
CHAPTER 2	9
BATCHMANAGER RATING	9
<i>Navigate to Rating</i>	<i>9</i>
<i>Preparing a Batch Input File.....</i>	<i>12</i>
<i>Rating a Batch File.....</i>	<i>14</i>
<i>Deleting a Batch File</i>	<i>18</i>
CHAPTER 3	19
BATCHMANAGER PACKAGING	19
<i>Navigating to Packaging</i>	<i>19</i>
<i>Creating a Packaging Job.....</i>	<i>21</i>
<i>Editing a Packaging Job.....</i>	<i>22</i>
<i>Start a Packaging Job</i>	<i>23</i>
<i>Stop a Packaging Job</i>	<i>24</i>
<i>Delete a Packaging Job</i>	<i>25</i>
<i>Programs Tab.....</i>	<i>26</i>
CHAPTER 4	31
SUPPORT.....	31
GLOSSARY.....	32
INDEX.....	36

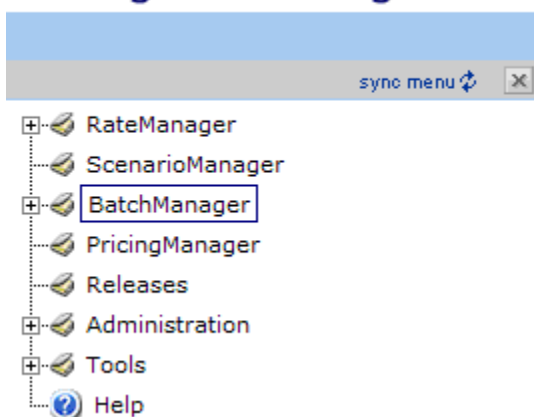
Figures

Figure 1 Batch Rating Screen	9
Figure 2 Example of a Batch XML File	12
Figure 3 Batch Rating Screen	14
Figure 4 Entering a Batch File Name	14
Figure 5 Confirmation Message for Batch Rate Request.....	15
Figure 6 Error Message for Batch Rate.....	15
Figure 7 New Rate Custom Batch File Dialogue Box.....	16
Figure 8 Example Custom Batch File	17
Figure 9 Confirmation Message for Batch Rate Request.....	17
Figure 10 Error Message for Batch Rate.....	18
Figure 11 Delete Input File Message.....	18
Figure 12 Packaging Jobs Screen.....	19
Figure 13 Creating New Job	21
Figure 14 Edit Job Options	22
Figure 15 Starting a Batch.....	23
Figure 16 Stopped Packaging	24
Figure 17 Stopped Packaging	25
Figure 18 Programs Tab.....	26
Figure 19 Adding Programs to a Packaging Job.....	27
Figure 20 Deleting Programs.....	28
Figure 21 Editing Program Packaging Options Allowing for Override.....	28
Figure 22 Editing Program Packaging Options Not Allowing for Override	30

Preface

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting BatchManager Guide*. This guide describes the features and functionality of Oracle Insurance Insbridge Rating and Underwriting BatchManager (BatchManager). BatchManager is an optional feature of Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager) that allows you to rate a group of policies in a batch rather than individually. BatchManager is available from the RateManager **Menu Tree**.

Insbridge™ RateManager



Audience

This guide is intended for RateManager users and system administrators who are tasked with batching. A fundamental knowledge of RateManager is required.

Notational Conventions

This section explains the conventions used in this guide:

- Menu selections are shown with arrows. For example, the command to select the **Print** choice from the **File** menu looks as follows:

Select **File** ► **Print**

- File names and path names are shown in **bold**.
- New or emphasized terms are shown in *italics*.

Navigating BatchManager

Navigate through BatchManager using the top and side bar menus. Your browser's tool bars will not be displayed.

If you need to visit another web site, open another window. It is a good practice to save your work before you visit another web site or leave your desk.

NOTE

Netscape® and Mac® OS browsers are unable to fully support Insbridge Applications.

NOTE

If you have a popup blocker installed, you will need to disable it for Insbridge Applications to work properly.

Basic Safety Precautions

It is recommended that you secure your computer when you need to step away. This prevents any unintentional deletions or entries and protects the integrity of your work.

Inactivity/ Timeout

BatchManager, a web-based application, will log you out without saving your work if you are inactive for a length of time. Your system administrator establishes the specified time. The default setting is **5 hours**. If timeout does occur, log back onto the system and continue to work.

Internet Explorer Settings

BatchManager is a web application that requires certain permissions and controls in order to properly interact with an end user's desktop and file system. For more information on changing Internet Explorer Settings, see the RateManager User Manual or the Insbridge Rating and Underwriting User Manual.

Clearing Temporary Files

Because Insbridge applications are web-based, you may need to clear out your browser's temporary file periodically.

Keeping the temporary file clear may improve performance by clearing off space from your hard drive.

For more information on clearing Temporary Files, see the RateManager User Manual or the Insbridge Rating and Underwriting User Manual.

Additional Information

For more information, see these Oracle Insurance resources:

- Oracle Insurance IBRU RateManager User Guide
- Oracle Insurance IBRU User Guide

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1 st Edition	P01-719-01	V 3.5	November 2005	
2 nd Edition	P01-719-02	V 3.5	June 2006	Update
3 rd Edition	P01-719-03	V 3.6	June 2006	Update Version
4 th Edition	P01-719-04	V 3.7	December 2006	Update Version
5 th Edition	P01-719-05	V 3.8	July 2007	Update Version
6 th Edition	P01-719-06	V 3.8.3	October 2007	Update Version
7 th Edition	P01-719-07	V 3.8.5	November 2007	Update Version
8 th Edition	P01-719-08	V 3.8.7	January 2008	Update Version
9 th Edition	P01-719-09	V 3.8.8	March 2008	Update Version
10 th Edition	P01-719-10	V 3.9.0	May 2008	Update Version
11 th Edition	P01-719-11	V 3.10.01	October 2008	Update Version
12 th Edition	P01-719-12	V 3.11	December 2008	Update Version
13 th Edition	P01-719-13	V 3.12	July 2009	Update Version

Introduction to BatchManager

BatchManager is used to rate multiple XML files at one time. Rates are returned in a result report. Result reports can be displayed in XML format or report format and can contain debug information if needed. The BatchManager screen also has a batch-packaging tool that gives you the ability to create multiple packages simultaneously and asynchronously.

Files can be batched individually or by folder. You have the option to create and batch rate one XML input file or create a folder with multiple XML input files that can be batch rated.

If you are only batch rating files, it is possible to batch various lines of business together. If you are creating batch files for other purposes, it is recommended that you batch lines of business together.

NOTE

When using custom XML in PricingManager and BatchManager, you must map the System Category – rate and category input pricing_manager_policy_id. This input requires a unique policy identifier and is used in the batch and pricing manager process. Please see the Oracle Insurance Insbridge Rating and Underwriting RateManager Guide for more information.

Working with PricingManager

Batch files are required when working with PricingManager. PricingManager compares the effects of a program change against existing rates. You can compare two complete sets of data, such as a data set containing current rates and another containing a proposed rate change. When creating a batch file for use in a PricingManager scenario, it is recommended that you keep lines of business together. This will allow for a more accurate and relative comparison.

Batch files that are run with the debug option will not be available for use by PricingManager. This allows you to run and debug files multiple times without being displayed in PricingManager.

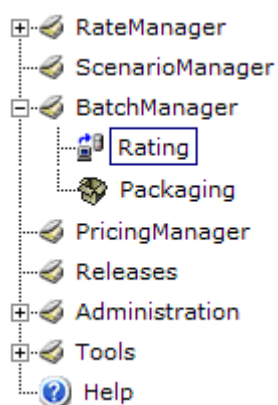
BatchManager has two options:

- **Rating**
- **Packaging**

BatchManager Rating

Navigate to Rating

1. Using the menu tree, select **BatchManager**, and then select **Rating**.



2. This will open the **Batch Rating** screen.

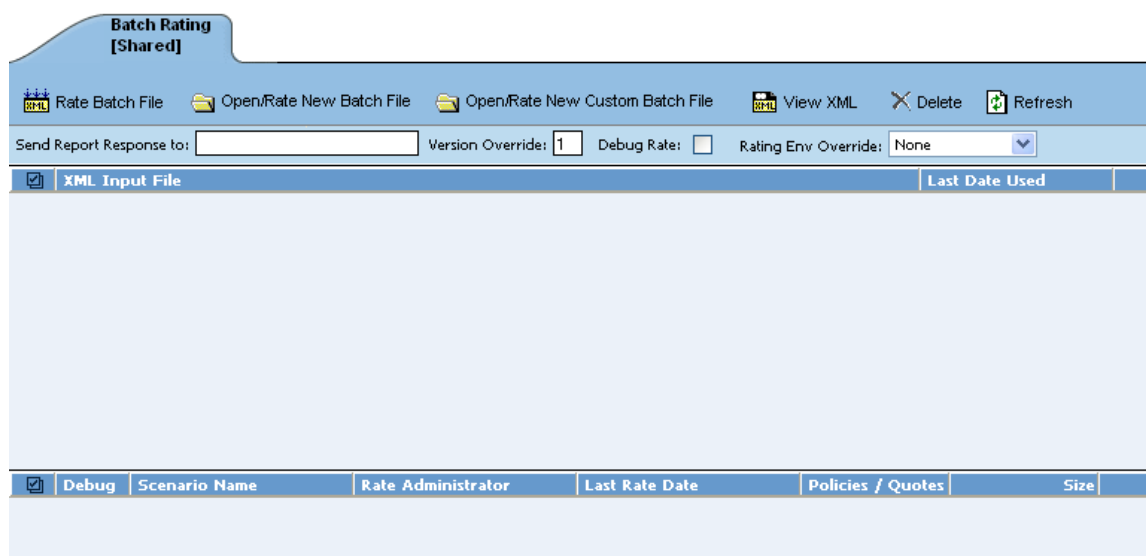


Figure 1 Batch Rating Screen

Navigation Bar

The **Navigation Bar** is available at the top of the **Main Frame** for all pages in the system.

Rate Batch File: Rates an existing/displayed input file. To use, highlight the file you want to rate or place a check in the box next to the name and select this option.

NOTE

You can also rate an existing/displayed input file by double clicking it.

Open/Rate New Batch File: Opens a browser window where you can select an input file to rate. The file must be in Insbridge.XML format.

Open/Rate New Custom Batch File: Opens a browser window where you can select a custom input file to rate. A separate screen will be displayed that allows you to define the file parameters and specify a mapping to use that will transform the input file into an Insbridge.XML format.

View XML: Allows you to view the selected XML file.

Delete: Removes the selected file(s).

NOTE

For input files, this does not delete the actual XML file.

Refresh: Refreshes the listing of input and result files.

Options

Send Report Response to: Provides a place where you can enter an email address that will receive notification when the rating is complete. This is a required field.

Version Override: If you want to override the version of the program that would normally be rated, enter the version number in this box. If you want to use the version specified in the input file (or determined by automatic version selection), clear this box.

Debug Rate: Checking this option sends the batch rate through debug. You must check this prior to rating a batch file. Debug files are local to BatchManager. If you want to use a batch file in PricingManager, do not select to debug the file.

Rating Env Override: Choose this option if you want to override the rating environment.

- **None** – no override will be in place. You also can use this option when you want to use the defined environment in your ratings.
- **Default** – selects the default environment.
- **Another Environment** – if other environments have been entered, you may select one of those.

NOTE

If you select Default or another environment, any defined environments in your ratings will be ignored.

XML Input File Listing

Shows a listing of input files, sorted newest to oldest by the last date used time stamp.

Check Box: Used to select multiple files to delete or a single file to rate. Can also be used with the View XML button to view a file's XML.

XML Input File: Displays the pathway of the input file.

Last Date Used: Time stamp of when the input file was last used.

Result File Listing

Shows a listing of result files, sorted newest to oldest by the last rate date time stamp. To open a result file, double-click it.

Check Box: Used to select multiple files to delete. Can also be used with the View XML button to view a file's XML.

Debug: A checkmark indicates the result file is a full debug report.

Scenario Name: The name of the result file.

Rate Administrator: The user that rated the file.

Last Rate Date: Time stamp of when the result file was produced.

Policies/Quotes: The total number of policies the result file is for.

Size: The size of the result file.

Preparing a Batch Input File

BatchManager can rate multiple XML files at one time either as a combined single file or as a group of XML files bundled together under one folder. The result files can then be used in a PricingManager scenario. The first step is to create a batch input file or folder.

There are two types of batch inputs files:

- **Individual File** – this is a combined, single XML file.
- **Group Folder** – this is a group of XML files under one folder.

NOTE

Only files located on a network share can be batch rated, i.e. the file path must be of the form "[\\server\\folder\\file.xml](#)". Files located on your local machine or on a mapped network drive are not available.

The network share must be accessible to both the BatchManager user and the user account used to run Insbridge, i.e. the account specified for the IBRU installation. If this account is a local account on the Insbridge server, then the network share must be established on a local drive on the Insbridge server itself.

Individual File

Batch files can be created in an XML editor. An individual batch input file consists of multiple XML input files surrounded by a batch header. You can create this file by assembling multiple input files and appending them together in one large batch XML file. An XML wrapper must be added to both the beginning and end of the document in order for the file to be valid XML.

An example single batch XML input file is shown below (<ibdoc> is used as the XML wrapper):

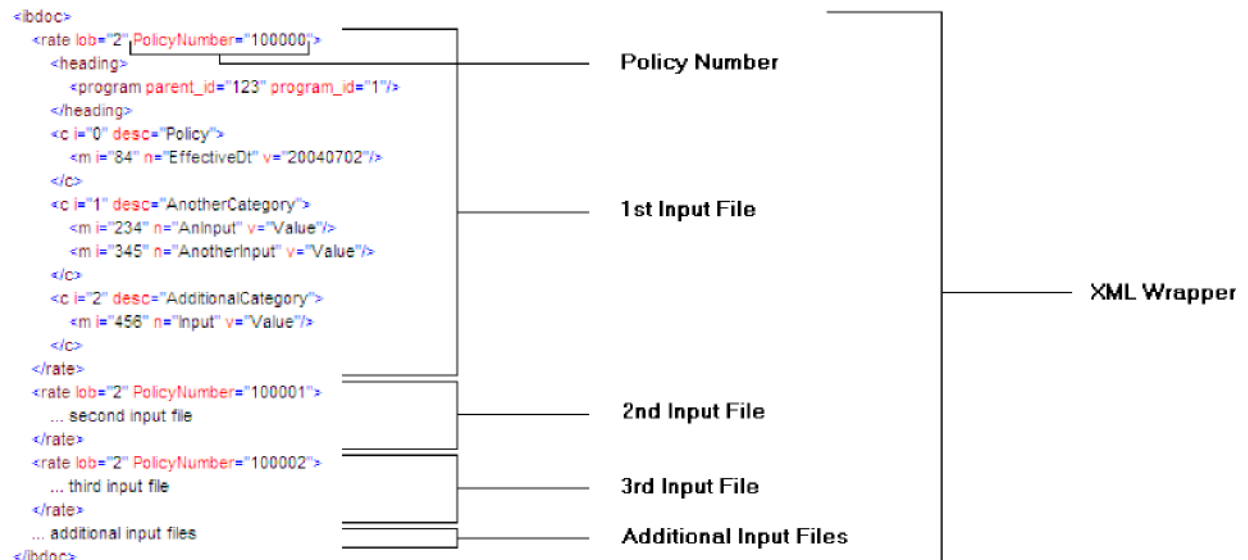


Figure 2 Example of a Batch XML File

Since the batch file consists of many input files, an additional element (PolicyNumber) is added to the rate node for each file. Although not required, this element lets you distinguish between the files when viewing a PricingManager result report.

Group Folders

Use a group folder when you want to group together multiple rate files. For example, you may have 500 auto policies that you want to rate. Rather than merge all of these files into one large batch XML file, you can place them all in a folder and rate the folder.

To create a group folder, place your Insbridge XML inputs into a folder. Folder names should not contain spaces or special characters. Groups folder are designated with a *.xml extension. Your file name will be similar to: [\\\(yourserver\)\BatchFiles\Group1*.XML](#). Do not place any other file type in the folder. This will cause an error and the folder will not batch.

It is possible to batch a group custom folder. When using custom files, each input file must have the same XSLT information to get Insbridge XML.

If you want to use a group folder result, make sure you save the confirmation email from any group folder batch. The result file name will be listed on the email. When you enter PricingManager, the baseline and comparison files names will be the result file name on the email and not necessarily the folder name.

Batch Results with New Line

In BatchManager, the results are set to form one continuous string. If you want to add a break between results, you must go to RateManager.

In RateManager, if the “Batch Results with a New Line” setting is set to true, batch results will go to a new line instead of forming one continuous string. A True setting places a carriage return between result files. A False setting will result in one continuous string without a break. Please see the RateManager guide for more information.

Rating a Batch File

1. Navigate to the **Batch Rating** screen.

Batch Rating [Shared]

Rate Batch File Open/Rate New Batch File Open/Rate New Custom Batch File View XML Delete Refresh

Send Report Response to: Version Override: 1 Debug Rate: Rating Env Override: None

XML Input File	Last Date Used
----------------	----------------

Debug	Scenario Name	Rate Administrator	Last Rate Date	Policies / Quotes	Size
-------	---------------	--------------------	----------------	-------------------	------

Figure 3 Batch Rating Screen

2. Enter an email address into the **Send Report Response to** text box. When the batch file is finished rating, an email will be sent to this address. A batch file cannot be rated without an email address.
3. To override the version of the program that would normally be rated, enter the version number in the **Version Override** box. To use the version specified in the input file (or determined by automatic version selection), clear this box.
4. If you want to debug this batch, check the **Debug Rate** box.
5. If the file to be rated is already listed in the input file listing, it can be rated by selecting it and clicking **Rate Batch File** or by double-clicking the file. If not, click **Open/Rate New Batch File**. A browse box will open for you to select the file to rate.

Batch New File -- Web Page Dialog

Browse...

Rate Close

Figure 4 Entering a Batch File Name

NOTE

If a file is moved to a different location, you will have to browse to find the file again before rating. If a change is made to an existing file, but the file is not moved, there is no need to browse to find the file. Just double-click the file to re-rate.


6. If the path to the input file is known, it can be typed in the box, otherwise, click the Browse... button to find a file to rate. When you are finished, click the  Rate button.
7. A popup message will appear that your request has been submitted for processing. If a different message is received, see step 9.



Figure 5 Confirmation Message for Batch Rate Request

8. You will receive an email when the file is finished rating. The result file can now be used in a PricingManager scenario or the result XML can be viewed by double-clicking the result file in BatchManager. See Introduction to PricingManager for more information.
9. If you rate a batch file and receive the following message, it means that an administrator needs to start the Insbridge Message Service using the Insbridge Framework Administrator. Once the service is started, the request will be submitted and processed.

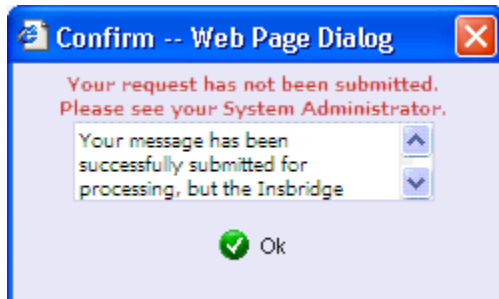

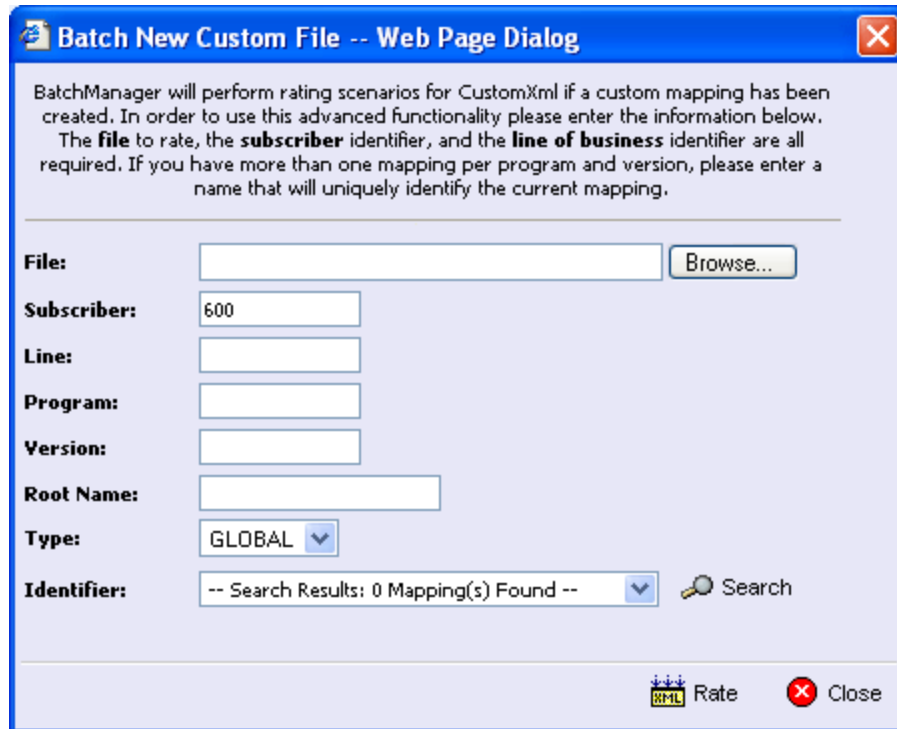


Figure 6 Error Message for Batch Rate

Open/Rate New Custom Batch File


Input files that are custom XML can be rated using the  Open/Rate New Custom Batch File button. A dialogue box will open where you can select the file to rate, and enter any other information needed.



The dialog box is titled "Batch New Custom File -- Web Page Dialog". It contains the following fields and controls:

- File:** A text input field with a "Browse..." button next to it.
- Subscriber:** A text input field containing the value "600".
- Line:** A text input field.
- Program:** A text input field.
- Version:** A text input field.
- Root Name:** A text input field.
- Type:** A dropdown menu currently showing "GLOBAL".
- Identifier:** A dropdown menu showing "-- Search Results: 0 Mapping(s) Found --" with a search icon and the text "Search".
- Buttons:** At the bottom right, there are two buttons: "Rate" (with a small icon) and "Close" (with a red X icon).

Figure 7 New Rate Custom Batch File Dialogue Box

1. If you know the path to the file you want to rate, type it in the box, otherwise, click  to find a file to rate.
2. Enter in the **Line**, **Program** and **Version** numbers. The Subscriber number will default to your current number.
3. Enter in the **Root Name**. This is the prefix file name or number for the files that you want to rate.

For example, if your file consists of multiple files, you may choose to rate only the files that are labeled nsO. When you enter nsO into the Root Name, the system will only return with the files that have nsO in the identifier field.

If no entry is made, no files will be returned.

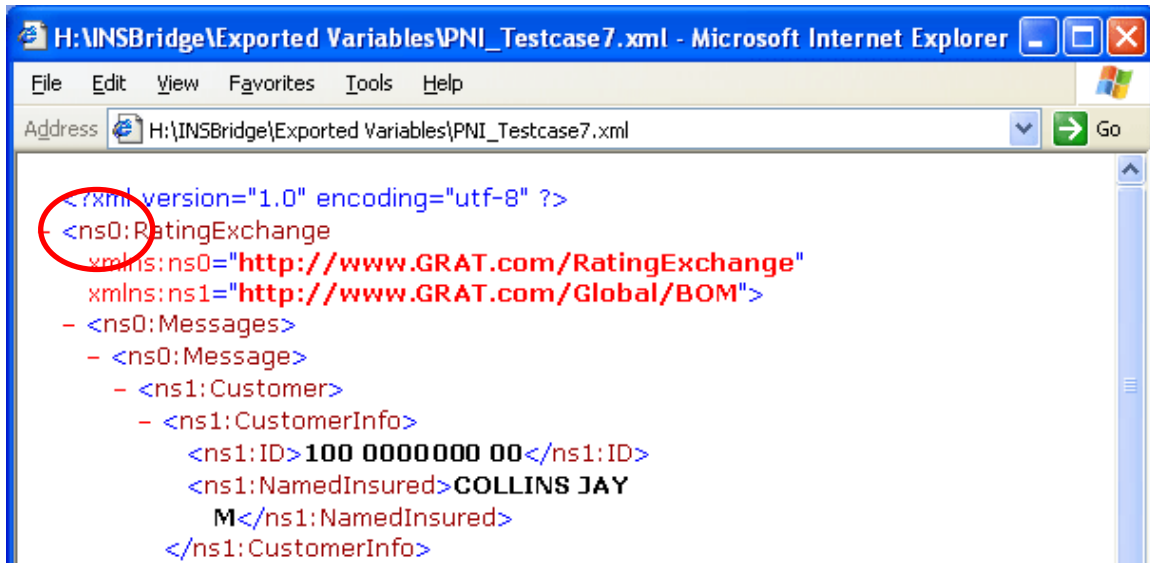


Figure 8 Example Custom Batch File


4. Select the **Type** from the drop down menu. There are three options; Global, Local and Custom.
5. Any mapping needed to transform the input file into the Insbridge.XML format will be in the **Identifier** field. Select the Identifier to be used for this rating. The options will be filled in after you select the File at the top of the popup. You can use the search button to find the file you need.
6. When finished, click  Rate. Your file will be rated and the result file will show in the result file listing.
7. A popup message will appear that your request has been submitted for processing. If a different message is received, see step 9.



Figure 9 Confirmation Message for Batch Rate Request

8. You will receive an email when the file is finished rating. The result file can now be used in a PricingManager scenario or the result XML can be viewed by double-clicking the result file in BatchManager. See Introduction to PricingManager for more information.
9. If you rate a batch file and receive the following message, it means that an administrator needs to start the Insbridge Message Service using the Insbridge Framework Administrator. Once the service is started, the request will be submitted and processed.

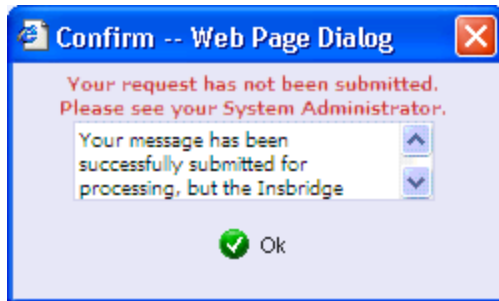



Figure 10 Error Message for Batch Rate

Deleting a Batch File

If an input file is no longer needed, it can be deleted.

To Delete an Input File

1. Navigate to the **Batch Rating screen**.
2. Select the input file you wish to delete and click  **Delete**.
3. You will be asked to confirm deletion of the input file.

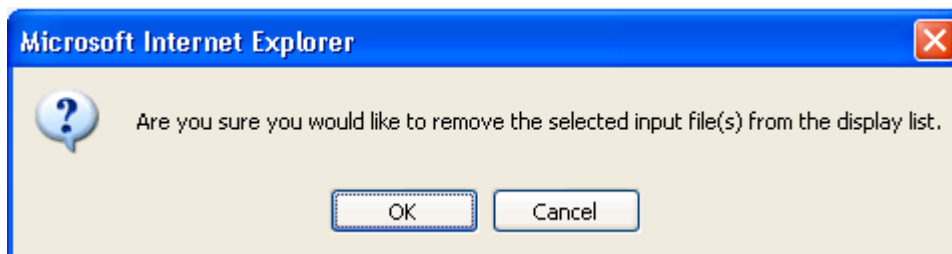


Figure 11 Delete Input File Message

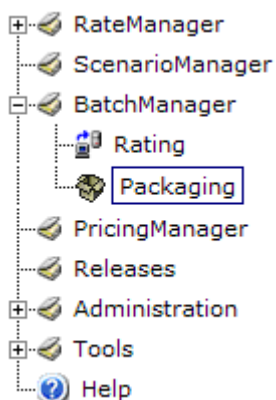
Click **OK** to delete the input file. Click **Cancel** to return to the batch rating screen without deleting the input file.

BatchManager Packaging

Navigating to Packaging

BatchManager has a batch-packaging tool. The batch packaging functionality gives you the ability to create multiple packages simultaneously and asynchronously. When creating packages asynchronously, you will be able to continue other RateManager operations while the system is packaging. You will be notified by email when the batch packaging process is completed.

1. Using the menu tree, select **BatchManager**, and then select **Packaging**.



2. This will open the **Packaging Jobs** screen.

Packaging Jobs					
Programs					
<div> New Edit Job Options Start Stop Delete Refresh </div> <div>Send Report Response to: <input type="text"/></div>					
Name	Programs	Executing	Last Run Date	Override Pack Options	
New Job Can delete	3		Jan 23 2009 2:48PM		
Testing Max Program_2003	108		Jan 23 2009 2:03AM	✓	
WF Load	4		Mar 2 2008 12:39PM	✓	
HIO_Packages	2		Jul 12 2008 1:36PM	✓	
BatchJob_Sar	10		Jul 18 2008 5:24PM	✓	
Test	1		Aug 8 2008 10:33AM		

Figure 12 Packaging Jobs Screen

Navigation Bar

The **Navigation Bar** is available at the top of the **Main Frame** for all pages in the system.

Programs Tab: Contains a listing of all the programs included in the packaging job.

New: Used to create a new packaging job. See Creating a Packaging Job for more information.

Edit Job Options: Used to edit packaging job name and details.

Start: Starts the packaging request. See Start Packaging for more information.

Stop: Stops the packaging request. See Stop Packaging for more information.

Delete: Removes the selected packaging job.

Refresh: Refreshes the listing of packaging jobs.

Options

Send Report Response to: Enter the email address of the person to be notified when the packaging job is complete. This is a required field.

Result File Listing

Shows a listing of packaging jobs, sorted oldest to newest by the last run date time stamp. To open a packaging job, double-click it.

Name: The name of the package job.

Programs: The number of programs that packaging job contains.

Executing: A checkmark indicates this packaging job is currently running. No checkmark indicates the packaging job is finished.


Last Run Date: Time stamp of when the packaging job was run.

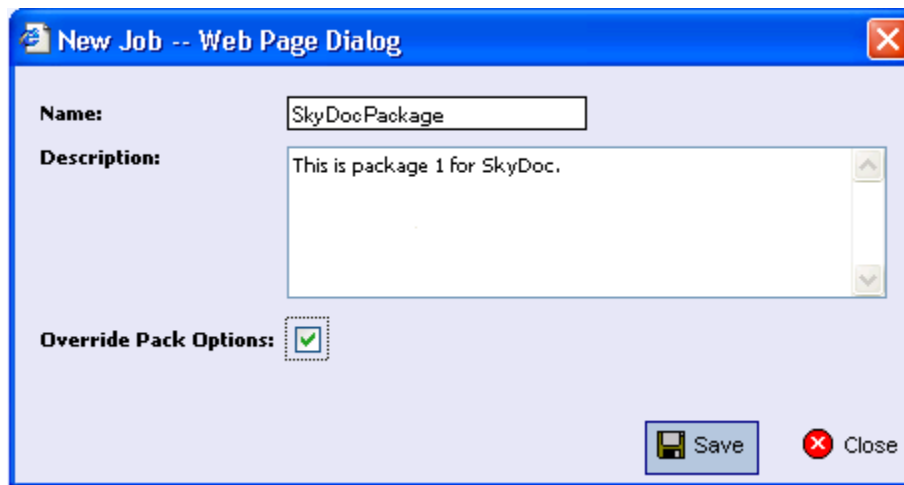
Override Pack Options: A checkmark indicates this packaging job has overridden packaging options. No checkmark indicates the packaging job is using current packaging options.

Creating a Packaging Job

A packaging job can be created at any time.


To Create a New Packaging Job

1. Navigate to the **Packaging Jobs** screen.
2. Select  **New** from the menu bar. This will open the **New Job** window.



The image shows a web-based dialog box titled "New Job -- Web Page Dialog". It has a blue header bar with a close button (X) in the top right corner. The main area is light blue and contains three fields: "Name:" with a text input field containing "SkyDocPackage", "Description:" with a text area containing "This is package 1 for SkyDoc.", and "Override Pack Options:" with a checked checkbox. At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Close" (with a red X icon).


Figure 13 Creating New Job

3. Enter a name, description and select if you want to override pack options.
4. Click  **Save** to save the job.

Editing a Packaging Job

A packaging job can be edited at any time.

To Edit a Packaging Job

1. Navigate to the **Packaging Jobs** screen.
2. Select  **Edit Job Options** from the menu bar. This will open the **Edit Job** window.

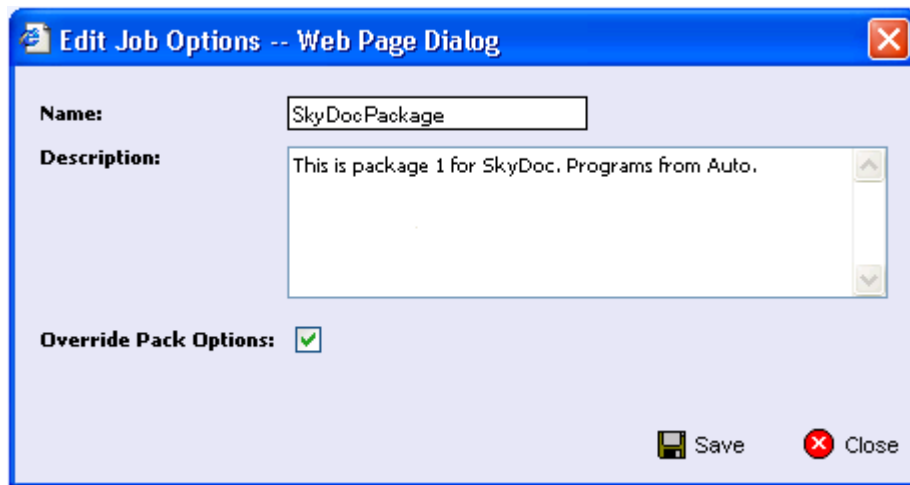



Figure 14 Edit Job Options

3. Make any changes and click  **Save** to save the job.

Start a Packaging Job

Once you have created your packaging job, you can start running it. Only one job can be run at a time.

To Start a Packaging Job

1. Navigate to the **Packaging Jobs** screen.
2. Select the packaging job you want to run.
3. Click the  **Start** button. You should receive a message that the batch package request was started successfully.

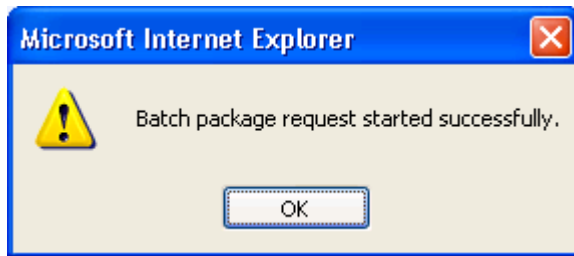


Figure 15 Starting a Batch

Click **OK**. On the packaging jobs screen, a checkmark will be placed in the executing column.

An email will be sent to the **send report response** recipient when the packaging finishes or fails.


NOTE

On packaging jobs where you have selected to override the pack options, you will have to select the packing options before the job will start.

Stop a Packaging Job

Any executing packaging job can be stopped prior to completion or failure.

To Stop a Packaging Job

1. On the **Packaging Jobs** screen, select the packaging job you want to stop.
2. Click the  **Stop** button. You should receive a message that the batch package request was stopped successfully.

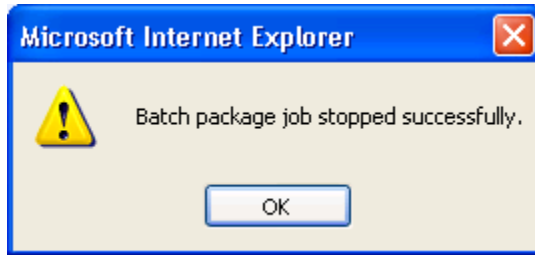


Figure 16 Stopped Packaging


Click **OK** to close the message.

An email will be sent to the **send report response** recipient that the packaging was stopped.

Delete a Packaging Job

Any packaging job that is no longer needed can be deleted at any time.

To Delete a Packaging Job

1. On the **Packaging Jobs** screen, select the packaging job you want to delete.
2. Click the  **Delete** button. You should receive a message that the batch package request was stopped successfully.

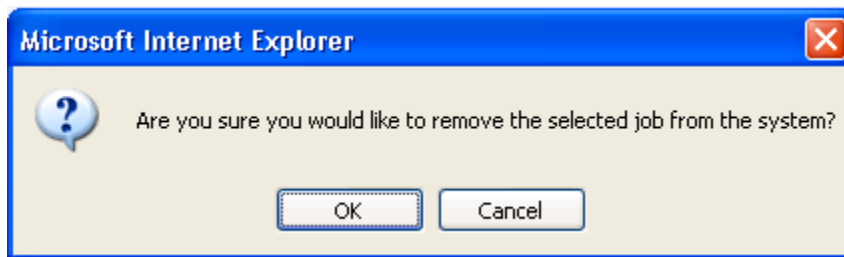


Figure 17 Stopped Packaging

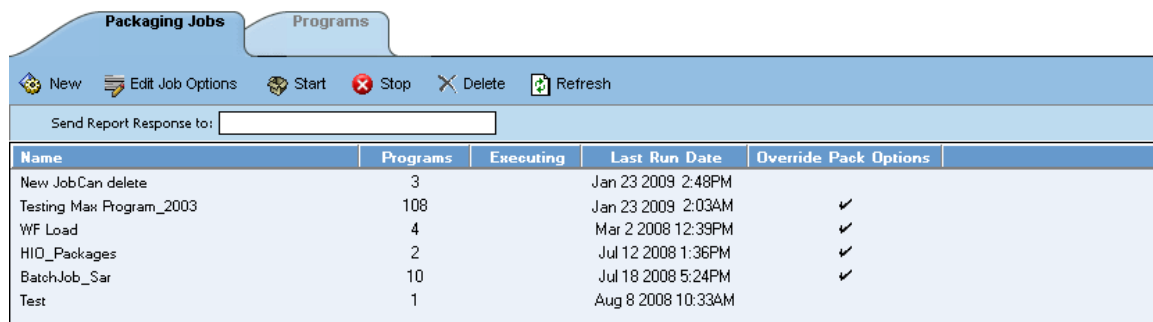
Click **OK** to delete the job or **Cancel** to cancel the request and return to the previous screen.

Programs Tab

The Program tab contains a listing of all the programs included in a selected packaging job.

Navigating to the Programs Tab

1. Navigate to the **Packaging Jobs** screen.
2. Select a packaging job. You can double click the packaging job or you can highlight the packaging job and click the programs tab.



The screenshot shows the 'Programs' tab selected within the 'Packaging Jobs' window. The interface includes a toolbar with icons for 'New', 'Edit Job Options', 'Start', 'Stop', 'Delete', and 'Refresh'. Below the toolbar is a 'Send Report Response to:' field. The main area contains a table with the following data:

Name	Programs	Executing	Last Run Date	Override Pack Options
New Job Can delete	3		Jan 23 2009 2:48PM	
Testing Max Program_2003	108		Jan 23 2009 2:03AM	✓
WF Load	4		Mar 2 2008 12:39PM	✓
HIO_Packages	2		Jul 12 2008 1:36PM	✓
BatchJob_Sar	10		Jul 18 2008 5:24PM	✓
Test	1		Aug 8 2008 10:33AM	

Figure 18 Programs Tab

Navigation Bar

Refresh: Refreshes the Content window.

Add Programs: Opens the Add Program window.

Remove Programs: Removes the selected programs from the release.

Edit Pack Options: Allows for changes to the packaging options.

Release Content Listing

Program Desc: The name of the program.

Line: The line of business for a specific program.


ProgID: The unique ID for a specific program.

ProgVer: The version number for a specific program.

Executing: A checkmark indicates this packaging job is currently running. No checkmark indicates the packaging job is finished.

Adding Programs to a Packaging Job

Multiple programs and program versions from different lines of business may be added to a packaging job. A packaging job cannot be run until programs have been added to it.

1. To Add a Program to a packaging job, click the  Add Program(s) button. The Add Programs screen will be displayed.

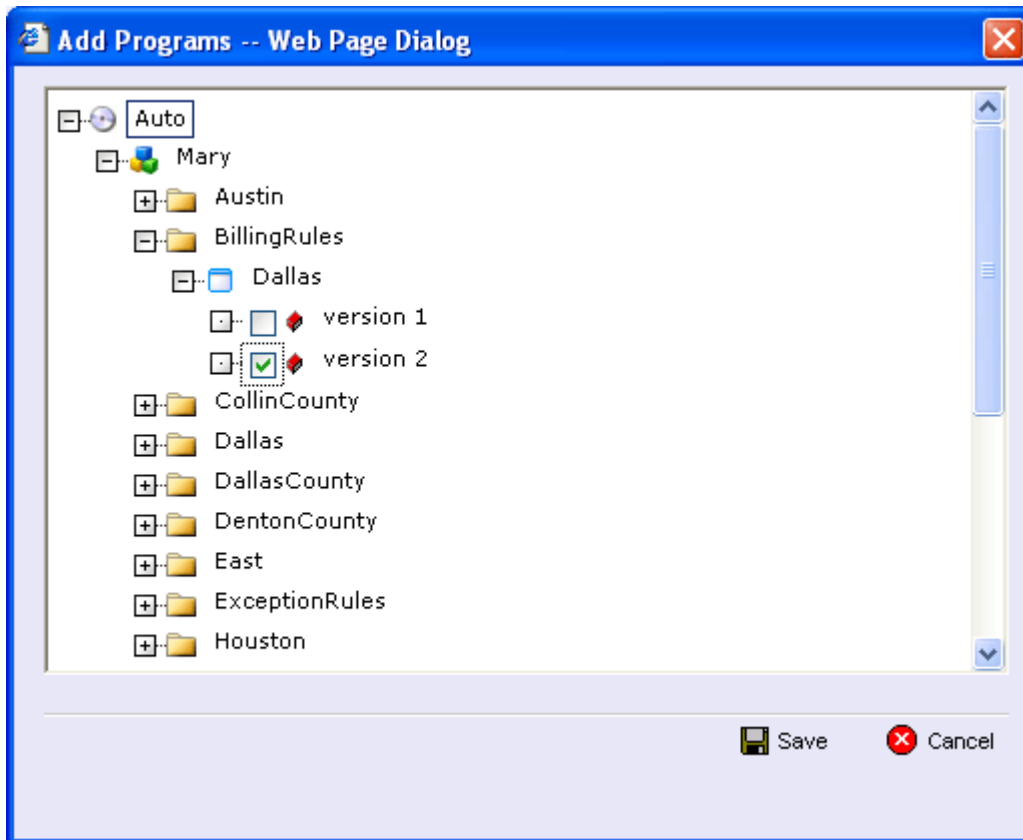



Figure 19 Adding Programs to a Packaging Job

2. Expand the line of business you would like. Select the folder(s) you want to add. Choose the program and place a checkmark next to the version or versions you want to add to your program.
3. Click  Save. You will be returned to the programs screen. Your selected versions will be listed.
4. When you are finished adding programs, click back over to the Packaging Jobs tab. Your job can be packaged now.

Removing a Program

To remove a program, place a checkmark in front of the program you do not want and click

 Remove Program(s).

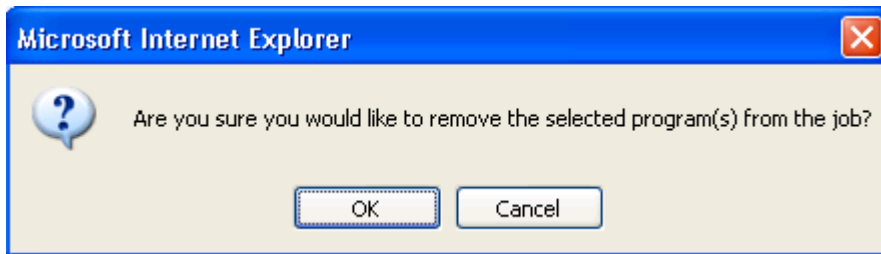



Figure 20 Deleting Programs

A warning message will confirm your action. Click **OK** to remove the program or click **Cancel** to cancel the action.

Editing Pack Options – Allowing for Override

If “**Enforce Release Packaging**” is enabled in the **Application Settings** screen, the following popup window will open, allowing you to set testing options for the package.

1. Select the program you want to edit and click  Edit Pack Options.

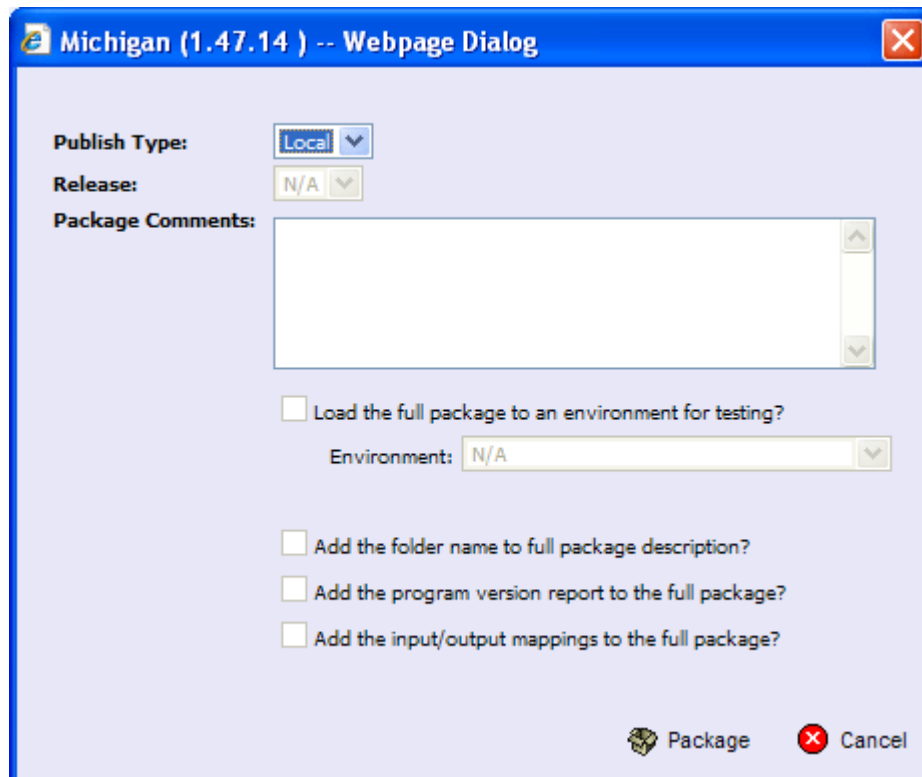


Figure 21 Editing Program Packaging Options Allowing for Override

Screen Options

If “**Enforce Release Packaging**” is enabled in the **Application Settings** screen, you will have the ability to set a location for testing.

Publish Type: Allows you to select the type of package to be created:

- Local
- Full

Environment: If you are creating a full package, this allows you to set the environment the package will initially be placed on. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created

Package Comments: If you are creating a full package, this allows you to enter comments about the package. The comments are viewable from the SoftRater Explorer.


Load full package to an environment for testing: Check for Yes, leave blank for No.

Environment: Select the environment where you want to load the package for testing.

Add the folder name to full package description? If you are creating a full package, check this box to add the folder name to the full package description. This feature allows IBFA Administrators to differentiate packages.

Add the program version report to the full package? Adds a program version report to the package. A program version report provides the details of a program version.

Add the input/output mappings to the full package? Adds the input/output mappings to the full package. If no input/output mappings exist, this option will not be displayed.

2. When you have finished setting the packaging options, click  **Save**. When you are finished editing programs, click back over to the Packaging Jobs tab. Your job can be packaged now.

If this is not the screen you want, click Cancel to close the window and return to the previous screen.

Editing Pack Options – Not Allowing for Override

System administrators set override options. If the system does not allow for overrides, the editing pack options screen will have a different look. You will not be able to select the release. If **“Enforce Release Packaging” is disabled in the Application Settings screen**, you will not be able to select an environment to load a package for testing.

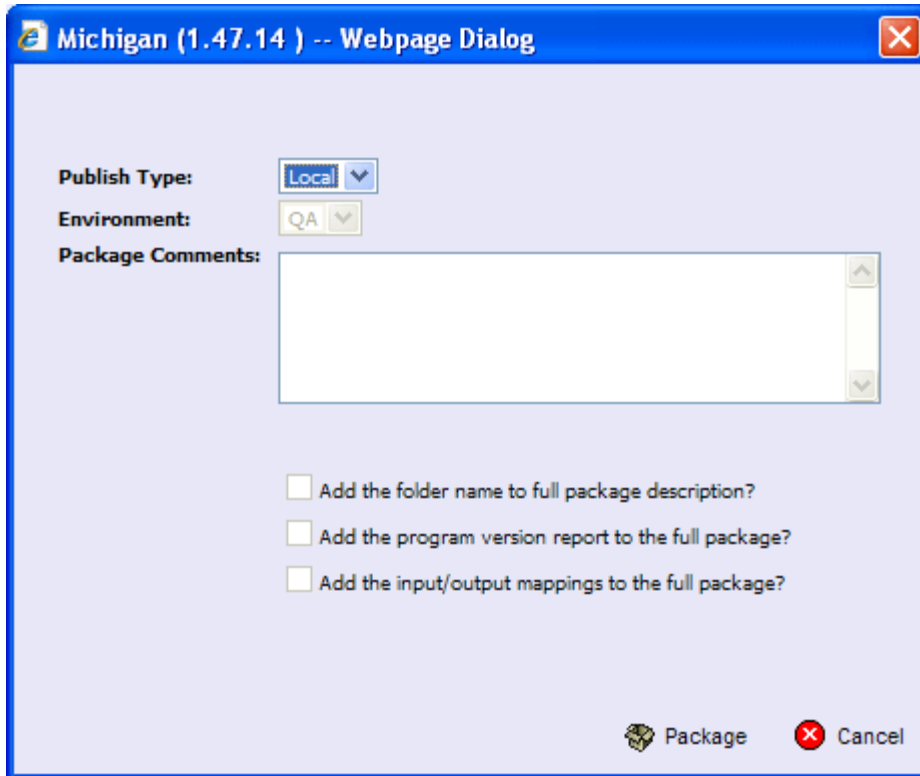


Figure 22 Editing Program Packaging Options Not Allowing for Override

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

Address any additional inquiries to:

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

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

Glossary

A	
Administrator:	The person designated by your company who has the authority to create and change groups, usernames, passwords and restrictions.
Algorithm:	A sequence of steps used to perform a calculation.
Assigned Driver:	A driver who has been assigned to a vehicle.
Assigned Vehicle:	A vehicle that has been assigned a driver.
C	
Calculated Variable:	Calculated Variables are used when a result cannot best be derived from simple data mapping in a table. For example, if age is not passed as an input, but is a criteria needed in determining other factors, you would use a Calculated Variable to calculate driver age from the inputs of effective date and driver date of birth. Calculated Variables look at every node (driver, vehicle, location, etc.) independently and create a result for each. Once a calculated variable is created, the result can be used in any other variable.
Callouts	A set of a single or multiple programs and/or SoftLibraries that allows users to call needed operations at a specific time from either inside the system or outside the system.
Category:	A user defined group of information that defines inputs, variables, algorithms and the overall structure of the program.
Criteria:	An input or variable used in a mapped variable to determine which value to return. Any input or variable can be used as a criteria.
D	
Data Type:	The type of data associated with a parameter. RateManager supports three (decimal, integer and string) data types for variables and inputs and a fourth (date) for inputs and result variables only.
Date:	A data type supported for inputs and result variables only. For more information, see Dates in the Contents section.
Decimal:	A data type supported for all types of variables and inputs. Examples of decimal values are 3.1415, 18 and 0.995.
Default Value:	Used by a mapped variable if no match is found based on the criteria.
Dependency:	When copying a variable, algorithm or driver assignment, any element that requires another element to be present or defined will be listed. All dependencies must be resolved.
Driver Assignment:	Driver assignment is an auto insurance specific method of assigning a particular driver to a particular vehicle on a policy, based on certain criteria. Criteria often differ on a carrier basis, and sometimes even on a program level.
Driver Assignment Scenario:	A driver assignment scenario is a list of instructions that define the main sequence of operations to properly define the driver assignment logic for a carrier. A scenario is based upon the same algorithm principle used throughout the RateManager software.

E	
Export:	Exports allow users to export all elements of a program from one database to another database or within the same database. Or to export data in tab-delimited form, from a RateManager table to an outside location.
F	
Flag:	A variable that holds a 1 for true and a 0 for false.
Flag Driver Algorithm:	An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.
Flag Driver Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Driver Algorithm.
Flag Vehicle Algorithm:	An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.
Flag Vehicle Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Vehicle Algorithm.
G	
Global:	An input or variable that is available to all programs under a specific subline.
Global Input:	A value that is passed into the rating system.
Global Result:	A value that is passed out of the system after rating.
Group:	A set of users that have the same access rights.
I	
If:	A step type available for use in calculated variables and algorithms. For more information, see If in the contents section.
Import:	Import allows users to bring in programs from an outside location into RateManager. Or to import data in tab-delimited form, into a RateManager table.
Input:	A value that is passed into the rating system.
Integer:	A data type supported for all types of variables and inputs. Examples of integer values are 3, 1859865 and -47.
Interpolation:	An estimated value derived from two known values.
L	
Library:	The Library is where templates are stored and managed.
Linked Variables:	Two or more mapped variables that have been associated with one another because they use the same criteria.
Lock:	A lock will close all associated Variables, Algorithms, Driver Assignments, Sequencing and Result Mappings in a program version from deletions and edits.
M	
Mapped Variable:	A variable that uses other variables and inputs as criteria in determining the appropriate value. See Mapped Variables in the Contents section for more information.

Mask:	A feature that allows the customer to determine how data should be interpreted. See Masking in the Contents section for more information.
N	
Normal Rating Algorithm:	<p>The most common type of algorithm. Examples of what it can be used for are:</p> <ul style="list-style-type: none"> • Determine premiums • Calculate differences in limits being passed into the system vs. limits being rated by the system • Assign tiers
O	
Operator:	A built-in mathematical function used in calculations and comparisons.
P	
Package:	A small file that holds all the RateManager logic for a specific program and version.
Program:	A planned group of procedures executed in a specific order to return a rating. Programs in RateManager typically correspond to rate manuals. Programs can be either created by the users or imported.
Program Date Mask:	Specifies how SoftRater interprets dates being passed into an input file.
Program Folders:	A RateManager file management system that functions in much the same way as Microsoft Windows Explorer. This multi level setup allows for an unlimited number of program folders and subfolders to be placed underneath a subline.
R	
Rank Driver Algorithm:	An algorithm used by a Rank Driver Function to rate drivers based on certain criteria.
Rank Driver Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rank Driver Algorithm.
Rank Vehicle Algorithm:	An algorithm used by a Rank Vehicle Function to rate vehicles based on certain criteria.
Rank Vehicle Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rate Vehicle Algorithm.
Reconcile	A comparison feature that compares one program version against another version in the same program and generate a report of the differences.
Restrictions:	Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator.
Result Mapping:	A defined set of results, inputs and variables displayed in the output file.
Revision:	A variable specific type of versioning. See Versioning in the Contents section for more information.
S	
Sequence:	The order in which algorithms run. See Sequencing in the Contents section for more information.

SoftLibrary:	A SoftLibrary is a specially developed program that performs a specific task. SoftLibraries may run their own code or call upon other systems to obtain information outside of RateManager, for example, obtaining a credit score
Source:	The source is the creator of a template and will also be the name of the new subline.
String:	A data type supported for all types of variables and inputs. Examples of string values are "2.718", "The quick brown fox jumps over the lazy dog." and "001".
Subline:	Sublines are classifications that fall in between lines of business and program folders. Sublines allow for the separation of programs by source.
T	
Tab-delimited:	A type of text file in which columns are separated by tabs. This is the required format for importing tables into RateManager.
Template:	Templates are exact copies of existing programs within a line of business that can be from within your own user group, any other user group within the company or even from an outside company.
U	
Unassigned Driver:	A driver who has not been assigned to a vehicle.
Unassigned Vehicle:	A vehicle that has not been assigned a driver.
Underwriting Algorithm:	A type of algorithm used to determine if a policy meets the requirements of the company.
Universal:	A collection of programs from all lines of business combined with result group mappings and assigned to execute in sequence that returns a single or multiple results.
V	
Variable:	A name used to represent a value that can change. See Variables in the Contents section for more information.
Version:	One of a sequence of copies of a program, each incorporating new modifications. See Versioning in the Contents section for more information.
W	
Wildcard:	An option available for mapped variables that tells RateManager that one or more rows ignore the value passed in for the criteria. See Variables in the Contents section for more information.
Workflow:	A workflow is a type of program that allows you to call multiple programs from different lines of business together under one universal program.
Working Category:	A classification used to define how elements should run. See Categories in the Contents section for more information.
X	
XML ID:	A number automatically assigned by RateManager to identify inputs and categories.

Index

A

Add Programs BatchManager	
Programs Tab	26
Adding	
Programs to Packaging Job	27

B

Batch File	
Deleting	18
Network Share	12
Batch Header	
Input Files	12
Batch Input File	
Creating	12
Batch Package Request	23
BatchManager	
Custom XML Files	16
Delete	10
Identifier	17
Input File Listing	11
Navigating	6
Navigating to Packaging	19
Navigating to Rating	9
Navigation Bar	10
Open/Rate New Batch File	10
Open/Rate New Custom Files	16
Options	10, 20
Overview	8
Packaging Navigation Bar	20
Programs Tab	26
Rate Batch File	10
Refresh	10
Result File Listing	11, 20
Root Name	16
View XML	10
BatchManager Definition	5
BatchManager Packaging Jobs Screen	
Delete	20
New	20
Refresh	20
Report	20
Start	20
Stop	20
BatchManager Programs Tab	
Add Programs	26
Edit Pack Options	26
Navigation Bar	26
Refresh	26

Remove Programs	26
BatchManager Screen	
Open/Rate Custom File	10
BatchResults	
New Line	13
Browser	
Compatibility	6

C

Changing	
Internet Explorer Settings	6
Check Box	
BatchManager	11
Result File Listing	11
Clearing	
Temporary Files	6
Creating	
Batch Input File	12
Full Package	29
Local Package	29
New Packaging Job	21
Custom XML Files	
BatchManager	16
ScenarioManager	23

D

Debug	
Result File, BatchManager	11
Default	
Rating Env Override	10
Definition BatchManager	5
Delete	
Batch File	18
BatchManager	10
BatchManager Packaging Jobs Screen	20
Packaging Job	25
Deployment Notes	
Global Versioning Package	29

E

Edit Job Options	22
Edit Pack Options	
BatchManager Programs Tab	26
Packaging Job	28
Editing	
Pack Options Override	30
Packaging Job	22

<i>Edition Notice</i>	2
Environment	
Package Screen Options	29
Errors	
Message for BatchManager.....	15, 17
Example	
XML Input File	12
Executing	
BatchManager Result File Listing	20
Release Content Listing.....	26

F

Files	
Re-locating for a Batch	15
Full	
Publish Type	29
Full Package	29
Environment.....	29

G

Global Versioning Package	
Deployment Notes	29
Publish Type	29

I

Identifier	
BatchManager.....	17
Inactivity.....	6
Input File	
Batch Header	12
Deleting BatchManager	10
Input File Listing	
BatchManager.....	11
Check Box.....	11
Last Date Used	11
XML Input File.....	11
Input Files	
Preparing.....	12
Internet Explorer Settings	
Changing.....	6

L

Last Date Used	
BatchManager.....	11
Last Rate Date	
BatchManager.....	11
Last Run Date	
BatchManager Result File Listing	20
Line	

Release Content Listing	26
Local	
Publish Type.....	29
Local Package	29

N

Name	
BatchManager Result File Listing	20
Navigating	
BatchManager.....	6
Packaging in BatchManager	19
Rating in BatchManager.....	9
Navigation Bar	
BatchManager.....	10
BatchManager Programs Tab.....	26
Packaging in BatchManager	20
Network Share	
Batch Files.....	12
New	
BatchManager Packaging Jobs Screen	20
New Job	
Creating in BatchManager	21
None	
Rating Env Override.....	10
Notational Conventions.....	5

O

Open/Rate Custom File	
BatchManager Screen	10
Open/Rate New Batch File	
BatchManager.....	10
Open/Rate New Custom Files	
BatchManager.....	16
Options	
BatchManager.....	10, 20
Package	28
Send Batch responses to	10
Send Batch Responses to.....	20
Version Override	10
Override	
Editing Pack Options.....	30
Override Pack Options	
BatchManager Result File Listing	20
Override Rating Env	10
Overview	
BatchManager.....	8

P

Package	
Creating Full	29
Creating Local	29

Environment.....	29
Full	29
Local.....	29
Options.....	28
Screen Options	29
Packaging Job	
Adding Programs	27
Creating New	21
Deleting	25
Edit Pack Options	28
Editing in BatchManager.....	22
Removing Programs	28
Starting.....	23
Stopping	24
Policies/Quotes	
BatchManager.....	11
Popup Blocker	6
Preparing Input Files	12
ProgID	
Release Content Listing.....	26
Program Desc	
Release Content Listing.....	26
Programs	
Adding to Packaging Job	27
BatchManager Result File Listing	20
Programs Tab	
BatchManager.....	26
ProgVer	
Release Content Listing.....	26
Publish Type	
Full	29
Global Versioning Package.....	29
Local.....	29

R

Rate Administrator	
BatchManager.....	11
Rate Batch File	
BatchManager.....	10
Rating	
Multiple XML Files.....	8, 12
Rating Env Override	10
Refresh	
BatchManager.....	10
BatchManager Packaging Jobs Screen.....	20
BatchManager Programs Tab.....	26
Release Content Listing	
Executing	26
Line	26
ProgID	26
Program Desc	26
ProgVer	26
Remove Programs.....	28
BatchManager Programs Tab.....	26

Report	
BatchManager Packaging Jobs Screen	20
Result File Listing	
BatchManager	11, 20
Check Box	11
Debug.....	11
Executing.....	20
Last Rate Date	11
Last Run Date	20
Name	20
Override Pack Options	20
Policies/Quotes	11
Programs.....	20
Rate Administrator	11
Scenario Name.....	11
Size	11
Result Files	
New Line Breaks	13
Root Name	
BatchManager	16

S

Scenario Name	
BatchManager.....	11
ScenarioManager	
Custom XML Files	23
Screen Options	
Environment	29
Package	29
Send Batch Responses to	14
BatchManager	10, 20
Size	
Result File, BatchManager.....	11
Start	
BatchManager Packaging Jobs Screen	20
Starting	
Packaging Job.....	23
Stop	
BatchManager Packaging Jobs Screen	20
Stopping	
Packaging Job.....	24

T

Temporary Files	6
Timeout	6

V

Version Override	
BatchManager	10, 14
View XML	
BatchManager	10

X

XML Files

Creating Batch	12
Deleting from BatchManager	10
Rating Multiple	8, 12

XML Input File

BatchManager	11
Example	12
XML Wrapper	
Added to Batch.....	12