

Oracle Insurance IBRU PricingManager Guide

Version 3.12

July 2009

Oracle Insurance Insbridge Rating and Underwriting PricingManager User Manual

Version 3.12

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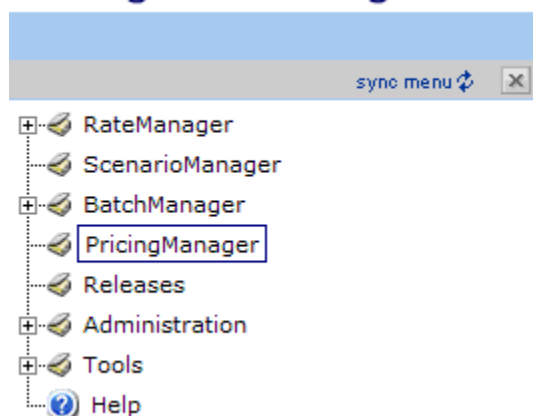
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Preface

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting PricingManager Guide*. This guide describes the features and functionality of Oracle Insurance Insbridge Rating and Underwriting PricingManager (PricingManager). PricingManager is a feature of Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager) that serves as a data analysis tool. PricingManager allows a user to compare the effects of a program change against existing rates. Users can compare two complete sets of data, such as a data set containing current rates and another containing a proposed rate change. PricingManager is available from the RateManager **Menu Tree**.

Insbridge™ RateManager



Audience

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

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

PricingManager, 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

PricingManager 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.

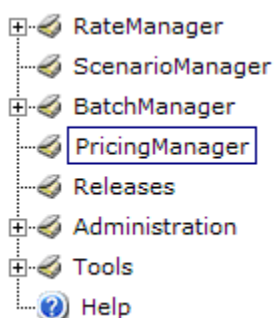
Edition	Publication Number	Product Version	Publication Date	Comment
1 st Edition	P01-730-01	V 3.5	November 2005	
2 nd Edition	P01-730-02	V 3.5	June 2006	Update
3 rd Edition	P01-730-03	V 3.6	June 2006	Update Version
4 th Edition	P01-730-04	V 3.7	December 2006	Update Version
5 th Edition	P01-730-05	V 3.8	July 2007	Update Version
6 th Edition	P01-730-06	V 3.8.3	October 2007	Update Version
7 th Edition	P01-730-07	V 3.8.5	November 2007	Update Version
8 th Edition	P01-730-08	V 3.8.7	January 2008	Update Version
9 th Edition	P01-730-09	V 3.8.8	March 2008	Update Version
10 th Edition	P01-730-10	V 3.9	May 2008	Update Version
11 th Edition	P01-730-11	V 3.10	October 2008	Update Version
12 th Edition	P01-730-12	V 3.11	December 2008	Update Version
13 th Edition	P01-730-13	V 3.12	July 2009	Update Version

Introduction to PricingManager

PricingManager is a data analysis tool that allows you to compare the effects of a program change against existing rates. You may run a book of business through the rating system and then compare two rate changes or two programs to analyze the true impact of a change.

To Navigate to PricingManager

1. Using the menu tree, click **PricingManager**.



2. This will open the PricingManager **Scenario Listing** screen.

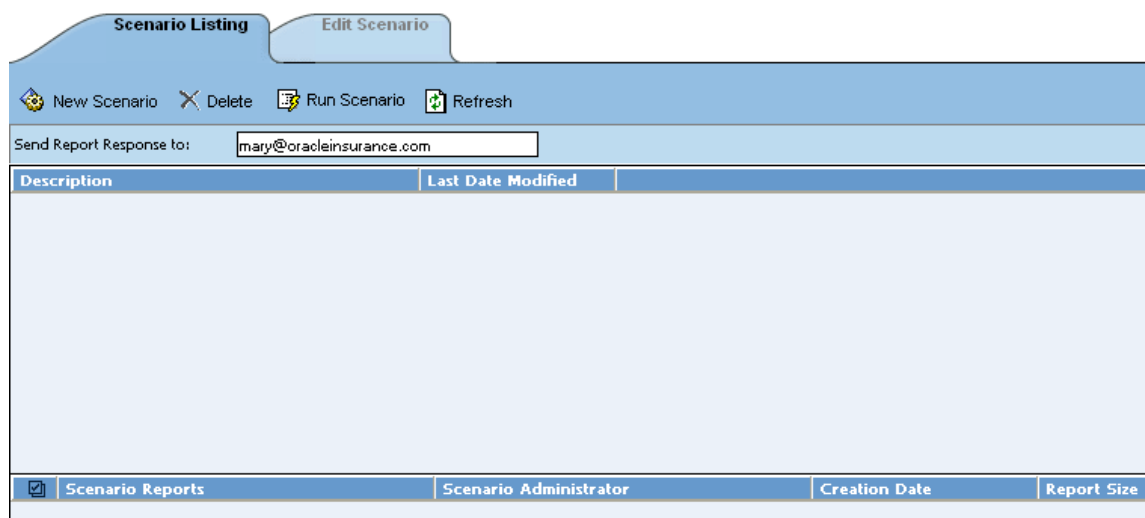


Figure 1 PricingManager Scenario Listing Screen

Navigation Bar

Edit Scenario Tab: Navigates to the Edit Scenario screen for the currently selected scenario.

New Scenario: Begins the process of creating a new scenario.


Delete: Removes the selected scenario or the selected report(s) from PricingManager.

Run Scenario: Submits the selected scenario for processing.

Refresh: Refreshes the listing of scenarios and reports.

Send Report Response to: Enter in an email address for the person to be notified when the report is ready for viewing. This is a required field.

Scenario Listing

Description: Shows a listing of scenarios that have been created. Double-click a scenario to edit it. To run a scenario, select it and click  Run Scenario.

Last Date Modified: Displays the date of the last modification.

Scenario Reports Listing

Shows a listing of reports generated, sorted newest to oldest. Double-click a report to open it.

Check Box: Used to select multiple reports to delete.

Scenario Reports: Name of the report.

Scenario Administrator: Email address of the user that ran the report.

Creation Date: Time stamp of when the report was generated.

Report Size: Size of the report.

PricingManager Preparation

Batch files are required when working with PricingManager. 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.

There are two types of batch inputs files:

- **Individual File** – An individual batch input file consists of multiple XML input files surrounded by a batch header. Since the batch file consists of many input files, it is recommended that 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. Files will retain their original name.
- **Group Folder** – A group of batch input files under one folder. Each input file will have the same header information and all the files will be contained within one folder. Groups folder are designated with a *.xml extension. The file name will not remain the same as the folder. 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.

Batch files that are run with the debug option will not be available for use by PricingManager.

Before running a PricingManager report, you must first identify the two programs or program versions to compare. These programs will come from BatchManager and should be in the same line of business.

When creating a PricingManager report, you will have the option to choose multiple items to show in the report. In order for these items to be available for a PricingManager report, they must first be added to the result mapping for both programs. The result IDs between these programs should also be identical. For more information, see Introduction to Result Mapping in the RateManager User Guide.

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.

NOTE

Once you have finished modifying the programs, a local package should be created for both programs before batch rating.

Creating a New PricingManager Scenario

Before creating a new scenario, batch result files should be available. If batch result files are not listed, you must create them. For more information, see Introduction to BatchManager.

To Create a New Scenario

1. Navigate to PricingManager.

Figure 2 PricingManager Screen

2. Click **New Scenario**. This will open the **Edit Scenario** screen for the new scenario.

BL	CMP	Results File	Last Date Modified	Policies / Quotes
<input checked="" type="radio"/>	<input type="radio"/>	New-2drv1PPhighKarenOR_20070404_083316_...	1/28/2009 8:33:26 AM	120
<input type="radio"/>	<input checked="" type="radio"/>	New-2drv1PPhighKarenOR_20070404_083616_...	1/28/2009 8:36:20 AM	100

Figure 3 Creating a New Scenario

3. Enter a name for the new scenario and choose the baseline and comparison files from the list of BatchManager result files. When finished, click **Save**. For more information on editing, see Editing a PricingManager Scenario.

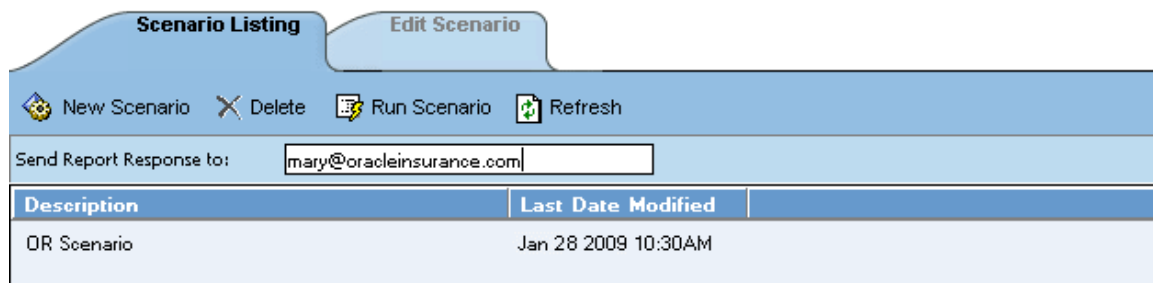
Editing a PricingManager Scenario

You can edit a scenario if changes need to be made to an existing scenario or a new scenario needs to be set up.

To Edit a Scenario

If editing a new scenario, skip to step 3.

1. Navigate to PricingManager.

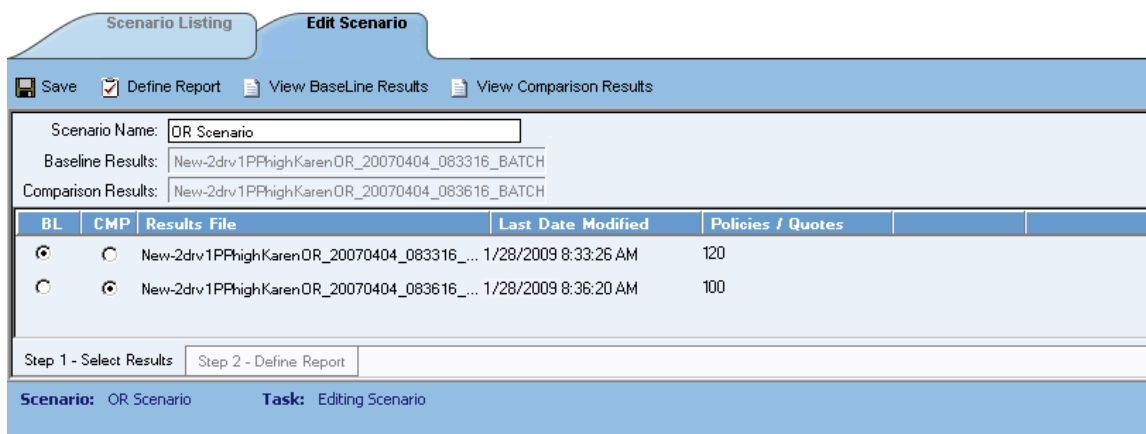


The screenshot shows the 'Scenario Listing' screen. At the top, there are two tabs: 'Scenario Listing' (active) and 'Edit Scenario'. Below the tabs is a toolbar with icons for 'New Scenario', 'Delete', 'Run Scenario', and 'Refresh'. A text field labeled 'Send Report Response to:' contains the email address 'mary@oracleinsurance.com'. Below this is a table with two columns: 'Description' and 'Last Date Modified'.

Description	Last Date Modified
OR Scenario	Jan 28 2009 10:30AM

Figure 4 PricingManager Scenario Listing Screen

2. Select a scenario to edit and then click the **Edit Scenario** tab. A scenario can also be opened for editing by double-clicking the name.
3. This will open **Step 1 - Select Results** of the **Edit Scenario** screen.





The screenshot shows the 'Edit Scenario' screen. At the top, there are two tabs: 'Scenario Listing' and 'Edit Scenario' (active). Below the tabs is a toolbar with icons for 'Save', 'Define Report', 'View BaseLine Results', and 'View Comparison Results'. The main area contains three text fields: 'Scenario Name:' (containing 'OR Scenario'), 'Baseline Results:' (containing 'New-2drv1PPhighKarenOR_20070404_083316_BATCH'), and 'Comparison Results:' (containing 'New-2drv1PPhighKarenOR_20070404_083616_BATCH'). Below these fields is a table with five columns: 'BL', 'CMP', 'Results File', 'Last Date Modified', and 'Policies / Quotes'.

BL	CMP	Results File	Last Date Modified	Policies / Quotes
<input checked="" type="radio"/>	<input type="radio"/>	New-2drv1PPhighKarenOR_20070404_083316_...	1/28/2009 8:33:26 AM	120
<input type="radio"/>	<input checked="" type="radio"/>	New-2drv1PPhighKarenOR_20070404_083616_...	1/28/2009 8:36:20 AM	100

At the bottom, there are two tabs: 'Step 1 - Select Results' (active) and 'Step 2 - Define Report'. Below the tabs, it says 'Scenario: OR Scenario' and 'Task: Editing Scenario'.

Figure 5 Edit Scenario

4. You can edit the name of the scenario or the baseline and comparison files if needed. When finished, click  **Save**.
5. To set filters for the scenario, or choose the results to be displayed, click  **Define Report** or click the bottom tab **Step 2 - Define Report**.
6. This will open **Step 2 - Define Report** of the **Edit Scenario** screen.

Scenario Listing
Edit Scenario

Save
☒ +/- Report Flag
☐ Edit Filter
☐ Remove Filter

Scenario Name:

Baseline Results:

Comparison Results:

Program Name:	Oregon	Program ID:	10
Line Of Bus:	Auto	Parent ID:	750

- Policy results:

result code ="TOTAL_POLICY_PREMIUM_NO_SDIP" description ="Total Policy Premium without SDIP"

result code ="TOTAL_POLICY_SDIP" description ="Total Policy SDIP Credit-Surcharge"

result code ="TOTAL_POLICY_PREMIUM_SDIP" description ="Total Policy Premium with SDIP"

result code ="PIP_DEDUCTIBLE" description ="PIPDeductible"

- Driver results:

result code ="SDIP_DRIVER_POINTS" description ="SDIPPoints"

- Vehicle results:

result code ="UW_VERIFY_TERRITORY" description ="UW - Verify Territory Info"

result code ="UW_INVALID_STATISTICAL_CLASS_CODE" description ="UW - Invalid Statistical Class Code"

result code ="BI_PREMIUM" description ="BI Premium"

result code ="PIP_PREMIUM" description ="PIP Premium"

result code ="UMBI_PREMIUM" description ="UMBI Premium"

result code ="PD_PREMIUM" description ="PD Premium"

result code ="OPTIONAL_BI_PREMIUM" description ="Optional BI Premium"

result code ="MP_PREMIUM" description ="MP Premium"

result code ="COLL_PREMIUM" description ="Coll Premium"

result code ="LIMITED_COLL_PREMIUM" description ="Limited Coll Premium"

result code ="COMP_PREMIUM" description ="Comp Premium"

result code ="SUBSTITUTE_TRANSPORTATION_PREMIUM" description ="Substitute Transportation Premium"

result code ="TOWING_LABOR_PREMIUM" description ="Towing and Labor Premium"

result code ="UMBI_PREMIUM" description ="UMBI Premium"

result code ="EXCESS_ELEC_EQUIP_PREMIUM" description ="Excess Electronic Equipment Premium"

result code ="SDIP_BI" description ="SDIP BI"

result code ="SDIP_PIP" description ="SDIP PIP"

result code ="SDIP_PD" description ="SDIP PD"

result code ="SDIP_COLL" description ="SDIP Coll"

result code ="TOTAL_VEHICLE_PREMIUM_NO_SDIP" description ="Total Vehicle Premium without SDIP"

result code ="TOTAL_VEHICLE_SDIP" description ="Total Vehicle SDIP Credit-Surcharge"

result code ="TOTAL_VEHICLE_PREMIUM_SDIP" description ="Total Vehicle Premium with SDIP"

result code ="VEHICLEID" description ="VehicleID"

result code ="TERRITORY_CODE" description ="Territory Code"

result code ="CITY_CODE" description ="City Code"

result code ="PD_LIMIT" description ="PDLimit"

result code ="MP_LIMIT" description ="MPLimit"

result code ="COLL_DEDUCTIBLE" description ="CollDeductible"

Step 1 - Select Results
Step 2 - Define Report

Scenario: OR_Scenario
Task: Editing Scenario
Status: Saved
Last Saved: 6:19:55 P.M.

Figure 6 Define Report – Edit Scenario

- Set filters and flags for the results. For more information on using this screen, see Editing a Scenario: Step 2 - Define Report.
- When you are finished making changes, click Save.

Editing a Scenario: Step 1 - Select Results

The first step in editing a scenario, or setting up a new scenario, is to name the scenario and select the result files to be compared. This is done via step 1 of the **Edit Scenario** tab. The information below describes the various parts of step 1. For more information on editing scenarios, see Editing a PricingManager Scenario and Editing a Scenario: Step 2 - Define Report.

Scenario Listing Edit Scenario

Save Define Report View BaseLine Results View Comparison Results

Scenario Name:

Baseline Results:

Comparison Results:

BL	CMP	Results File	Last Date Modified	Policies / Quotes
<input checked="" type="radio"/>	<input type="radio"/>	New-2drv1PPhighKarenOR_20070404_083316_...	1/28/2009 8:33:26 AM	120
<input type="radio"/>	<input checked="" type="radio"/>	New-2drv1PPhighKarenOR_20070404_083616_...	1/28/2009 8:36:20 AM	100

Step 1 - Select Results Step 2 - Define Report

Scenario: OR Scenario Task: Editing Scenario

Figure 7 Step 1 – Select Results

Navigation Bar

Scenario Listing Tab: Returns you to the listing of scenarios and results.

Save: Saves changes to the current scenario. If you choose a different baseline or comparison file, the scenario should be saved before defining the report.

Define Report: Opens Step 2 of the **Edit Scenario** screen, where you can choose results to filter on and which results to display. If you choose a different baseline or comparison file, the scenario should be saved before defining the report. This works the same as the bottom tab, **Step 2 - Define Report**.

View Baseline Results: Allows you to view the Batch Rating Summary report of the selected baseline file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. For more information, see Viewing Baseline and Comparison Files.

View Comparison Results: Allows you to view the Batch Rating Summary report of the selected comparison file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. For more information, see Viewing Baseline and Comparison Files.

Scenario Information

Scenario Name: Enter a name for the scenario.

Baseline Results: The result file that contains the original results. This field is not directly editable. It updates when a new baseline file is chosen from the results file listing.

Comparison Results: The result file that will be compared to the baseline file. This field is not directly editable. It updates when a new comparison file is chosen from the results file listing.

Results File Listing

Shows a listing of all result files from BatchManager and allows you to specify the baseline and comparison files.

BL: Column, with radio buttons, that allows the user to choose the baseline file. Select the radio button next to the file to set it as the baseline. Only one baseline file can be chosen.

CMP: Column, with radio buttons, that allows you to choose the comparison file. Select the radio button next to the file to set it as the comparison. Only one comparison file can be chosen.

Results File: Name of the results file.

Last Date Modified: Time stamp of when the results file was created.

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

Bottom Tabs

Step 1 - Select Results: The current screen.

Step 2 - Define Report: Opens Step 2 of the **Edit Scenario** screen, where you can choose which results to filter on and which results to display. If you choose a different baseline or comparison file, the scenario should be saved before defining the report. Works the same as the **Define Report** button.

File Names

When selecting baseline and comparison files, please take note of the file names. Individual files will retain their file names. Group files will return with an ALL_DIR_FILES batch file name. This may make locating a group file confusing because the folder name will not be listed. To locate the exact group file you need, please refer back to the batch process email you received. This will have the name of the batch file return result.

The screenshot shows the 'Edit Scenario' window with the following fields:

- Scenario Name:
- Baseline Results:
- Comparison Results:

Below these fields is a table with columns: BL, CMP, Results File, Last Date Modified, and Policies / Quotes.

BL	CMP	Results File	Last Date Modified	Policies / Quotes
<input checked="" type="radio"/>	<input type="radio"/>	TC01_20090130_023823_BATCH.xml	1/30/2009 2:38:25 PM	1
<input type="radio"/>	<input checked="" type="radio"/>	ALL_DIR_FILES_20090130_023427_BATCH.xml	1/30/2009 2:35:47 PM	99

Two red arrows point from text boxes to the table rows:

- An arrow points from the first row to a box labeled "Example of an Individual file name."
- An arrow points from the second row to a box labeled "Example of a group file name."

Figure 8 File Name Example

Editing a Scenario: Step 2 - Define Report

The second step in editing a scenario, or setting up a new scenario, is choosing the results to filter on and the results to show on the report. This is done via step 2 of the **Edit Scenario** tab. The information below describes the various parts of step 2. For more information on editing scenarios, see Editing a PricingManager Scenario and Editing a Scenario: Step 1 - Select Results.

Scenario Listing Edit Scenario

Save +/- Report Flag Edit Filter Remove Filter

Scenario Name:

Baseline Results:

Comparison Results:

Program Name:	Oregon	Program ID:	10
Line Of Bus:	Auto	Parent ID:	750

-Policy results:

- result code="TOTAL_POLICY_PREMIUM_NO_SDIP" description="Total Policy Premium without SDIP"
- result code="TOTAL_POLICY_SDIP" description="Total Policy SDIP Credit-Surcharge"
- result code="TOTAL_POLICY_PREMIUM_SDIP" description="Total Policy Premium with SDIP"
- result code="PIP_DEDUCTIBLE" description="PIPDeductible"

-Driver results:

- result code="SDIP_DRIVER_POINTS" description="SDIPPoints"

-Vehicle results:

- result code="UW_VERIFY_TERRITORY" description="UW - Verify Territory Info"
- result code="UW_INVALID_STATISTICAL_CLASS_CODE" description="UW - Invalid Statistical Class Code"
- result code="BI_PREMIUM" description="BI Premium"
- result code="PIP_PREMIUM" description="PIP Premium"
- result code="UMBI_PREMIUM" description="UMBI Premium"
- result code="PD_PREMIUM" description="PD Premium"
- result code="OPTIONAL_BI_PREMIUM" description="Optional BI Premium"
- result code="MP_PREMIUM" description="MP Premium"
- result code="COLL_PREMIUM" description="Coll Premium"
- result code="LIMITED_COLL_PREMIUM" description="Limited Coll Premium"
- result code="COMP_PREMIUM" description="Comp Premium"
- result code="SUBSTITUTE_TRANSPORTATION_PREMIUM" description="Substitute Transportation Premium"
- result code="TOWING_LABOR_PREMIUM" description="Towing and Labor Premium"
- result code="UIMBI_PREMIUM" description="UIMBI Premium"
- result code="EXCESS_ELEC_EQUIP_PREMIUM" description="Excess Electronic Equipment Premium"
- result code="SDIP_BI" description="SDIP BI"
- result code="SDIP_PIP" description="SDIP PIP"
- result code="SDIP_PD" description="SDIP PD"
- result code="SDIP_COLL" description="SDIP Coll"
- result code="TOTAL_VEHICLE_PREMIUM_NO_SDIP" description="Total Vehicle Premium without SDIP"
- result code="TOTAL_VEHICLE_SDIP" description="Total Vehicle SDIP Credit-Surcharge"
- result code="TOTAL_VEHICLE_PREMIUM_SDIP" description="Total Vehicle Premium with SDIP"
- result code="VEHICLEID" description="VehicleID"
- result code="TERRITORY_CODE" description="Territory Code"
- result code="CITY_CODE" description="City Code"
- result code="PD_LIMIT" description="PDLimit"
- result code="MP_LIMIT" description="MPLimit"
- result code="COLL_DEDUCTIBLE" description="CollDeductible"

Step 1 - Select Results Step 2 - Define Report

Scenario: OR_Scenario Task: Editing Scenario Status: Saved Last Saved: 6:19:55 P.M.

Figure 9 Step 2 – Define Report

Navigation Bar

Save: Saves changes to the current scenario.

+/- Report Flag: Adds or removes the report flag from the selected result. A report flag also can be added or removed by double-clicking a result. For more information, see **Report Flags**.

Edit Filter: Opens the edit filter popup that allows you to specify how the result is filtered. For more information, see **Report Filters**.

Remove Filter: Removes all filters from the selected result.

Program Information



Program Name: Shows the name of the program for the baseline file.

Line of Bus: Line of business the programs are for.

Program ID: Shows the program ID of the program for the baseline file.

Parent ID: Parent ID (i.e. Subscriber) of the programs.

Results

Shows a listing of the results the baseline and comparison files have in common, arranged by category. A  indicates that the report flag has been set, thus the result will be shown in the report. A  indicates that a filter has been set for the result.

Bottom Tabs

Step 1 - Select Results: Opens Step 1 of the **Edit Scenario** screen, where you can enter a name for the scenario and choose which files will be compared.

Step 2 - Define Report: The current screen.

Stop and Start Times


Start and stop times can be listed at the top of the result if needed. Start and stop times are set in the Insbridge SoftRater Server (IBSS) on the Edit Options page. Allowing for start and stop times to be displayed will return start and stop times on all XML documents that IBSS processes. An administrator may have to make the changes.


Information on Baseline & Comparison Files

When PricingManager compares the baseline file to the comparison file, it does so by taking the value in the comparison file and subtracting the value in the baseline file. For example, suppose for Policy 1, the baseline file has a value of 1000 for the **Total Policy Premium**, while the result file has a value of 1250. Then, when PricingManager compares the two values, it will take the value in the comparison file (1250) and subtract the value in the baseline file (1000) and come up with a result of 250. Thus, if the filter, where the diff is > 200, is set up on the **Total Policy Premium**, Policy 1 would show in the **Filtered Policy Details** section.

However, if the situation were reversed, such that the baseline file had a value of 1250 and the comparison file had a value of 1000, Policy 1 would not meet the filter because the difference would be -250. Therefore, Policy 1 would not be shown in the **Filtered Policy Details** section. To cover both positive and negative differences, the user would need to set up two filters. One that says where the diff is > 200 and one that says where the diff is < -200.

Viewing Baseline and Comparison Files

Clicking the  **View BaseLine Results** button allows you to view the Batch Rating Summary report of the selected baseline file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file.

Clicking the  **View Comparison Results** button allows you to view the Batch Rating Summary report of the selected comparison file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file.

To View a Baseline or a Comparison File

1. Navigate to PricingManager.

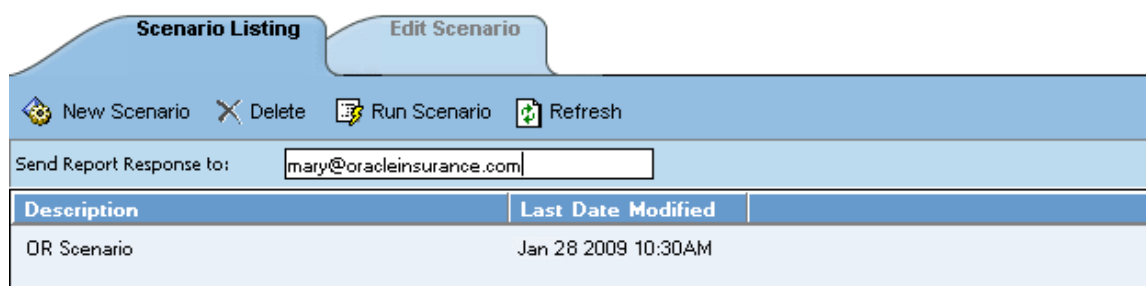


Figure 10 PricingManager Scenario Listing Screen

- Scenario Listing

Edit Scenario

Save
 Define Report
 View BaseLine Results
 View Comparison Results

Scenario Name:



Baseline Results:

Comparison Results:

BL	CMP	Results File	Last Date Modified	Policies / Quotes	
<input checked="" type="radio"/>	<input type="radio"/>	New-2drv1PPhighKarenOR_20070404_083316_...	1/28/2009 8:33:26 AM	120	
<input type="radio"/>	<input checked="" type="radio"/>	New-2drv1PPhighKarenOR_20070404_083616_...	1/28/2009 8:36:20 AM	100	

Step 1 - Select Results

Scenario: OR Scenario
 Task: Editing Scenario

4. If you are creating a new scenario, select the file you need. Otherwise, click the  View BaseLine Results button or the  View Comparison Results button to view the appropriate file. A separate screen will be displayed.



Program Information

Program Name: Shows the name of the program for the baseline file. If the program has more than one file, a drop down menu will be displayed which will allow you to select the program you want to view. The first 200 programs will be listed.

Program Version: Shows the version of the program for the baseline file.

Line of Bus: Which line of business the program is for.

Rate Location: Displays where the rate information is located.

Package Date: The last date and time the package was created.

File Rated: Name of the file rated.

Result File: The XML file name. Use this to verify that you have selected the right file.

Program ID: Shows the program ID of the program for the baseline file.



Rate Status: The results of the rating request.

Parent ID: Parent ID (i.e. Subscriber) of the programs.

Rate Environment: The name of the environment the rated package is loaded to.

From Cache: A True or False result. True indicates that the file was rated from cache. False, the file was not rated from cache.

Search

Allows you to search for a particular word or phrase. Enter or paste the phrase you are looking for and then press **Enter** or click  **Find**. By default, the search will start at the current location and proceed down (forward). To proceed up (backward), select the radio button next to **Up**. To find the next instance of the word or phrase, press **Enter** or click  **Find** again.

Print

Opens a printer-friendly version of the Rating Summary report.

Close Window

Closes the current Rating Summary report.

Results

Shows the selected results, sorted by category, in an easy to read table format.

- **ID:** The Result ID entered on the Edit Group screen in Result Mapping.
- **Item Description:** The name of the element (result, variable or input).
- **Values:** The value for the element. If multiple instances of the category exist, then there will be a **Value** column for each instance.

Report Flags

In order for a result to show on a PricingManager report, it must be flagged. If a result appears multiple times for the same policy, all instances of the result will be shown in the **Filtered Policy Details** section. For example, in the example below, a report flag has been added to the **Policy** result **TOTAL_POLICY_SDIP**. For each vehicle on the policy, a **TOTAL_POLICY_SDIP** will be shown. For more information on how results are displayed, see Viewing a PricingManager Report.

To Flag or Un-flag a Result

1. Navigate to **Step 2 - Define Report** on the Edit Scenario screen.

Scenario Listing Edit Scenario

Save +/- Report Flag Edit Filter Remove Filter

Scenario Name: OR_Scenario

Baseline Results: New-2drv1PPHighKarenOR_20070404_083316_BATCH

Comparison Results: New-2drv1PPHighKarenOR_20070404_083616_BATCH

Program Name: Oregon Program ID: 10

Line Of Bus: Auto Parent ID: 750

-Policy results:

- result code="TOTAL_POLICY_PREMIUM_NO_SDIP" description="Total Policy Premium without SDIP"
- ☒ result code="TOTAL_POLICY_SDIP" description="Total Policy SDIP Credit-Surcharge"
- result code="TOTAL_POLICY_PREMIUM_SDIP" description="Total Policy Premium with SDIP"
- result code="PIP_DEDUCTIBLE" description="PIPDeductible"

-Driver results:

- result code="SDIP_DRIVER_POINTS" description="SDIPPoints"

-Vehicle results:

- result code="UW_VERIFY_TERRITORY" description="UW - Verify Territory Info"
- result code="UW_INVALID_STATISTICAL_CLASS_CODE" description="UW - Invalid Statistical Class Code"
- result code="BI_PREMIUM" description="BI Premium"
- result code="PIP_PREMIUM" description="PIP Premium"
- result code="UMBI_PREMIUM" description="UMBI Premium"
- result code="PD_PREMIUM" description="PD Premium"
- result code="OPTIONAL_BI_PREMIUM" description="Optional BI Premium"
- result code="MP_PREMIUM" description="MP Premium"
- result code="COLL_PREMIUM" description="Coll Premium"
- result code="LIMITED_COLL_PREMIUM" description="Limited Coll Premium"
- result code="COMP_PREMIUM" description="Comp Premium"
- result code="SUBSTITUTE_TRANSPORTATION_PREMIUM" description="Substitute Transportation Premium"
- result code="TOWING_LABOR_PREMIUM" description="Towing and Labor Premium"
- result code="UIMBI_PREMIUM" description="UIMBI Premium"
- result code="EXCESS_ELEC_EQUIP_PREMIUM" description="Excess Electronic Equipment Premium"
- result code="SDIP_BI" description="SDIP BI"
- result code="SDIP_PIP" description="SDIP PIP"
- result code="SDIP_PD" description="SDIP PD"
- result code="SDIP_COLL" description="SDIP Coll"
- result code="TOTAL_VEHICLE_PREMIUM_NO_SDIP" description="Total Vehicle Premium without SDIP"
- result code="TOTAL_VEHICLE_SDIP" description="Total Vehicle SDIP Credit-Surcharge"
- result code="TOTAL_VEHICLE_PREMIUM_SDIP" description="Total Vehicle Premium with SDIP"
- result code="VEHICLEID" description="VehicleID"
- result code="TERRITORY_CODE" description="Territory Code"
- result code="CITY_CODE" description="City Code"
- result code="PD_LIMIT" description="PDLimit"
- result code="MP_LIMIT" description="MPLimit"
- result code="COLL_DEDUCTIBLE" description="CollDeductible"

Step 1 - Select Results Step 2 - Define Report

Scenario: OR_Scenario Task: Editing Scenario Status: Saved Last Saved: 6:19:55 P.M.

Figure 13 Flagging or Un-Flagging a Result

2. Select the result you wish to flag or un-flag and then click **+/- Report Flag**. A flag can also be added or removed by double-clicking the result or by right clicking it and selecting **Add/Remove Report Flag** from the popup menu.

3. If you added a flag, a check icon (✓) will show next to the result. If you removed a flag, the check icon will be removed.

NOTE

There is no limit to the number of results that can be flagged, however, the more results that are flagged, the larger the report will be.

Report Filters

A filter is used when you wish to view details on all policies that meet certain criteria. For example, if you only wanted to see those policies whose **BI_Premium** increased by more than \$100, you would set a filter on the **BI_Premium**. Filters can be set for multiple results and/or multiple filters can be set for a single result. There is no limit to the number of filters that can be set.

To Add/Edit a Filter

1. Navigate to **Step 2 - Define Report** on the Edit Scenario screen.

Scenario Listing Edit Scenario

Save +/- Report Flag Edit Filter Remove Filter

Scenario Name: OR_Scenario

Baseline Results: New-2drv1PPHighKarenOR_20070404_083316_BATCH

Comparison Results: New-2drv1PPHighKarenOR_20070404_083616_BATCH

Program Name:	Oregon	Program ID:	10
Line Of Bus:	Auto	Parent ID:	750

-Policy results:

- result code = "TOTAL_POLICY_PREMIUM_NO_SDIP" description = "Total Policy Premium without SDIP"
- ☒ result code = "TOTAL_POLICY_SDIP" description = "Total Policy SDIP Credit-Surcharge"
- result code = "TOTAL_POLICY_PREMIUM_SDIP" description = "Total Policy Premium with SDIP"
- result code = "PIP_DEDUCTIBLE" description = "PIPDeductible"

-Driver results:

- result code = "SDIP_DRIVER_POINTS" description = "SDIPPoints"


-Vehicle results:

- result code = "UW_VERIFY_TERRITORY" description = "UW - Verify Territory Info"
- result code = "UW_INVALID_STATISTICAL_CLASS_CODE" description = "UW - Invalid Statistical Class Code"
- result code = "BI_PREMIUM" description = "BI Premium"
- result code = "PIP_PREMIUM" description = "PIP Premium"
- result code = "UMBI_PREMIUM" description = "UMBI Premium"
- result code = "PD_PREMIUM" description = "PD Premium"
- result code = "OPTIONAL_BI_PREMIUM" description = "Optional BI Premium"
- result code = "MP_PREMIUM" description = "MP Premium"
- result code = "COLL_PREMIUM" description = "Coll Premium"
- result code = "LIMITED_COLL_PREMIUM" description = "Limited Coll Premium"
- result code = "COMP_PREMIUM" description = "Comp Premium"
- result code = "SUBSTITUTE_TRANSPORTATION_PREMIUM" description = "Substitute Transportation Premium"
- result code = "TOWING_LABOR_PREMIUM" description = "Towing and Labor Premium"
- result code = "UIMBI_PREMIUM" description = "UIMBI Premium"
- result code = "EXCESS_ELEC_EQUIP_PREMIUM" description = "Excess Electronic Equipment Premium"
- result code = "SDIP_BI" description = "SDIP BI"
- result code = "SDIP_PIP" description = "SDIP PIP"
- result code = "SDIP_PD" description = "SDIP PD"
- result code = "SDIP_COLL" description = "SDIP Coll"
- result code = "TOTAL_VEHICLE_PREMIUM_NO_SDIP" description = "Total Vehicle Premium without SDIP"
- result code = "TOTAL_VEHICLE_SDIP" description = "Total Vehicle SDIP Credit-Surcharge"
- result code = "TOTAL_VEHICLE_PREMIUM_SDIP" description = "Total Vehicle Premium with SDIP"
- result code = "VEHICLEID" description = "VehicleID"
- result code = "TERRITORY_CODE" description = "Territory Code"
- result code = "CITY_CODE" description = "City Code"
- result code = "PD_LIMIT" description = "PDLimit"
- result code = "MP_LIMIT" description = "MPLimit"
- result code = "COLL_DEDUCTIBLE" description = "CollDeductible"

Step 1 - Select Results Step 2 - Define Report

Scenario: OR_Scenario Task: Editing Scenario Status: Saved Last Saved: 6:19:55 P.M.

Figure 14 Add or Edit a Filter

2. Select the result you wish to add or edit a filter for and then click  **Edit Filter**. You can also add or edit a filter by right clicking the result and selecting **Edit Filter** from the popup menu.
3. This will open the **Filter Options** window where you can set the options for the filter.

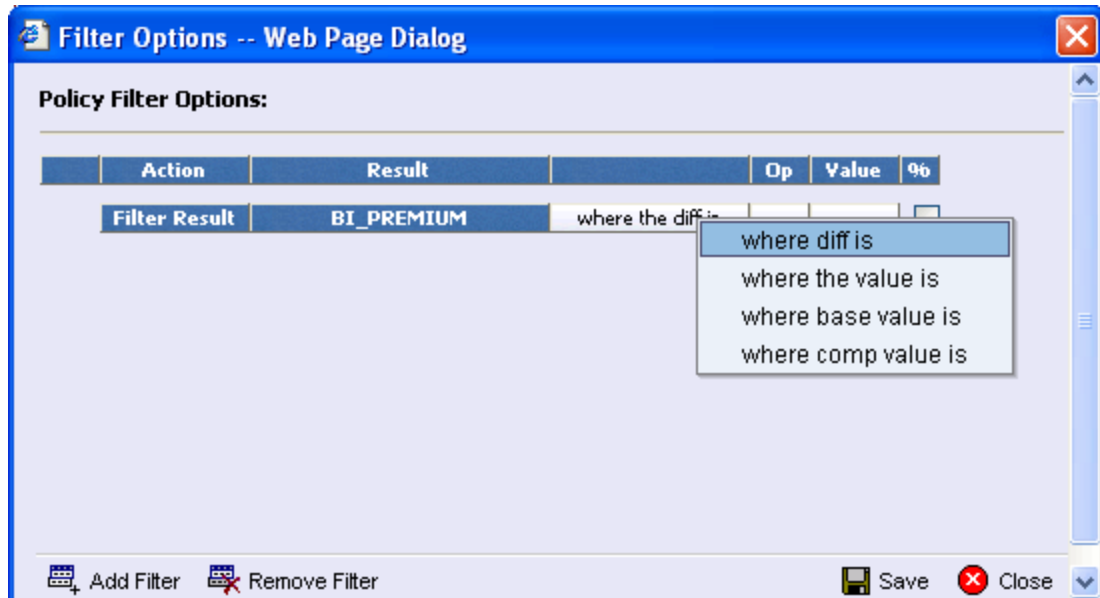


Figure 15 Policy Filter Options

4. The action and result fields are determined by the result you selected. If you want to change these fields, close this window and select the correct result.
5. Select the type of filter you want to use by clicking the appropriate cell in the filter type column and selecting one of the available options from the popup menu. In Figure 15, you would click **where diff is**.

PricingManager provides four types of filters:

- **Where the diff is:** This option takes the difference of the result in the baseline file and the result in the comparison file. It then compares the difference against the value entered, using the chosen operator. Since subtraction is only defined for numbers, this filter does not make sense for strings or dates.
 - **Where the value is:** This option compares the value entered against the value in the file.
 - **Where base value is:** This option compares the value entered against the baseline value. This filter looks for matches against the baseline value. Percentages are not allowed.
 - **Where comp value is:** This option compares the value entered against the comparison value. This filter looks for matches against the comparison value. Percentages are not allowed.
6. Select the operator to be used by clicking the appropriate cell in the **Op** column and selecting one of the available options from the popup menu.

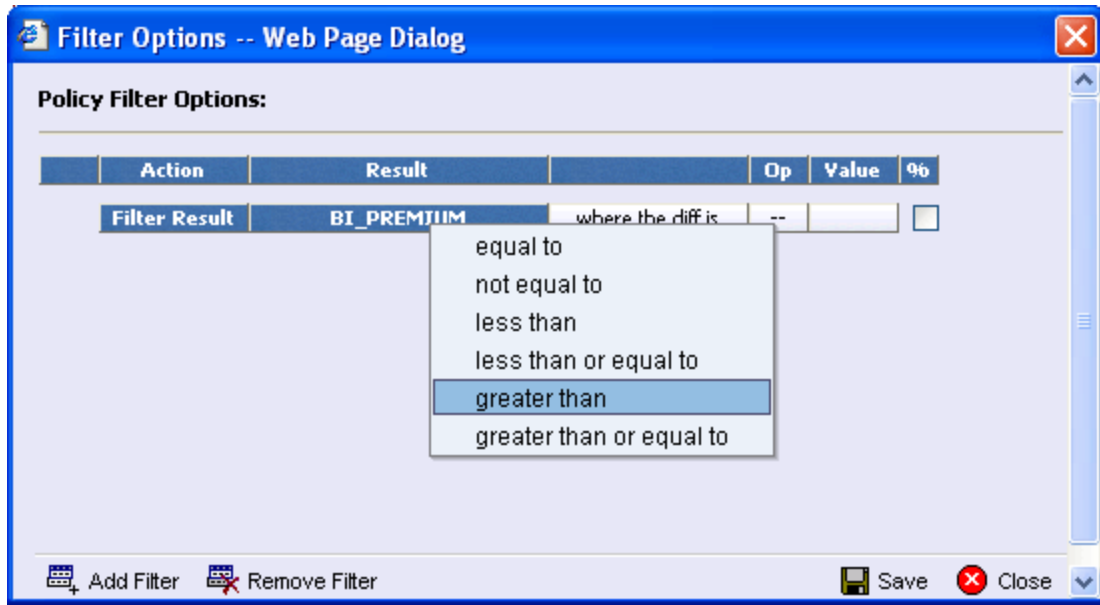


Figure 16 Filter Options Selecting an Operator

In the example above, you would select **greater than**. Comparisons such as greater than and less than are only defined for numbers. Thus, for string and date values, only the comparisons of equals and not equals make sense.

7. Enter the value you wish to compare against by clicking the appropriate cell in the **Value** column and entering a numeric or alphanumeric value, depending on the data type.

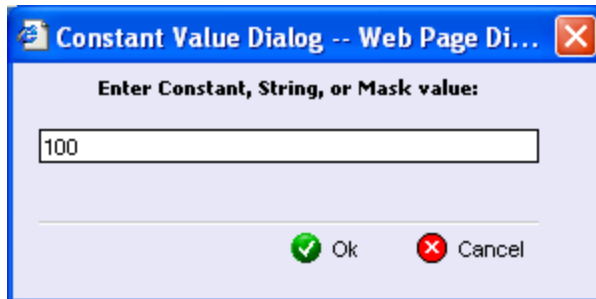



Figure 17 Entering a Constant Value

In Figure 17 , you would enter in **100**.

NOTE





The filter in Figure 15 is set on the **Total Policy Premium**. The filter will be met for all policies in which the **Total Policy Premium** increased by more than \$100, i.e. the comparison file **Total Policy Premium** minus the baseline file **Total Policy Premium** is greater than 100.

8. If you are using the **where the diff is** filter option, you can select the checkbox in the % column to filter based on the percent difference instead of the dollar difference. Make sure the value you enter into the **Value** column is the actual percentage difference you wish to compare against, i.e. for 8%, you would enter 8.

9. If you wish to add additional filters for the current result, click  Add Filter and repeat steps 4 through 8.

NOTE

Multiple filters may be created for a PricingManager report. As new filters are added, each filter must be met in order for a policy to show in the **Filtered Policy Details** section.

10. To remove one of the filters, select the radio button next to the one you wish to delete and click  Remove Filter. The first filter listed cannot be removed from this window. Use the  Remove Filter button available on **Step 2 - Define Report** of the **Edit Scenario** screen to remove all filters from a result.
11. When you are finished making changes, click  Save to close the Filter Options window and refresh the Define Report screen. A funnel icon () will appear next to the result you added a filter for.

Running a PricingManager Scenario

Once you have finished editing your scenario, you can run it to produce a PricingManager report. The report will show data based upon the report flags and filters you defined.

To Run a PricingManager Scenario

1. Navigate to PricingManager.

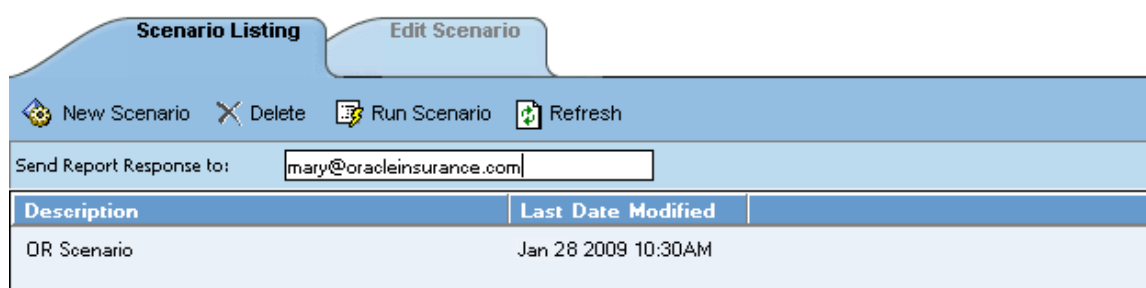


Figure 18 PricingManager Scenario Listing Screen

2. Enter an email address into the **Send Report Response to** text box. When the report is ready, an email will be sent to this address. A scenario cannot be run without an email address.
3. Select the scenario you wish to run and then click **Run Scenario**.
4. A popup message will appear that your request has been submitted for processing. If a different message is received, see step 6.

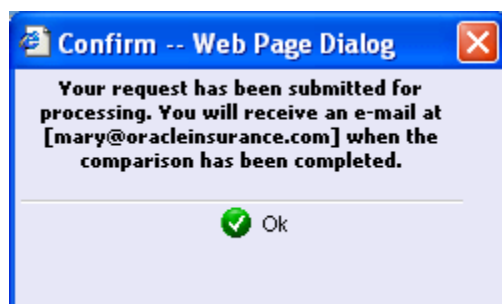


Figure 19 Confirmation Message for Running a PricingManager Scenario

5. When the report is ready, an email will be sent to the address entered. Return to PricingManager and double-click the report to view it. If the report is not shown, click **Refresh**. For more information, see Viewing a PricingManager Report.

- If you run a scenario 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.

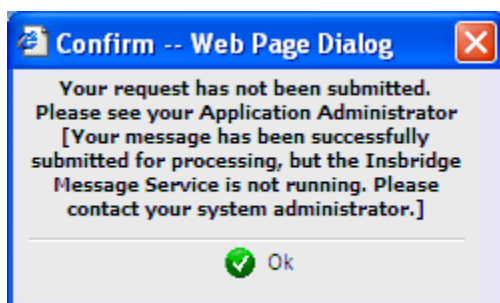


Figure 20 Error Message for Running a PricingManager Scenario

Viewing a PricingManager Report

Depending on the complexity of your scenario and the number of policies, when your report is ready, you will receive an email that it is available for viewing. You can then return to PricingManager, or refresh the screen if it is already open, to view your report.

To View a PricingManager Report

- Navigate to PricingManager.

Description	Last Date Modified
OK_REG234_Scenario	Dec 8 2003 4:57PM
OR_Scenario	Feb 3 2009 6:20PM
SW_Scenario3	Jan 10 2004 7:02PM
TX_GD_OV25 Scenario	Apr 28 2008 10:44AM

Scenario Reports	Scenario Administrator	Creation Date	Report Size
<input type="checkbox"/> OR Scenario_1176914707937.xml	mary@oracleinsurance.com	2/3/2009 2:20:04 PM	25 KB

Figure 21 Viewing a PricingManager Report

- Locate the report you wish to view in the listing and double-click it. The report will open in a new window.

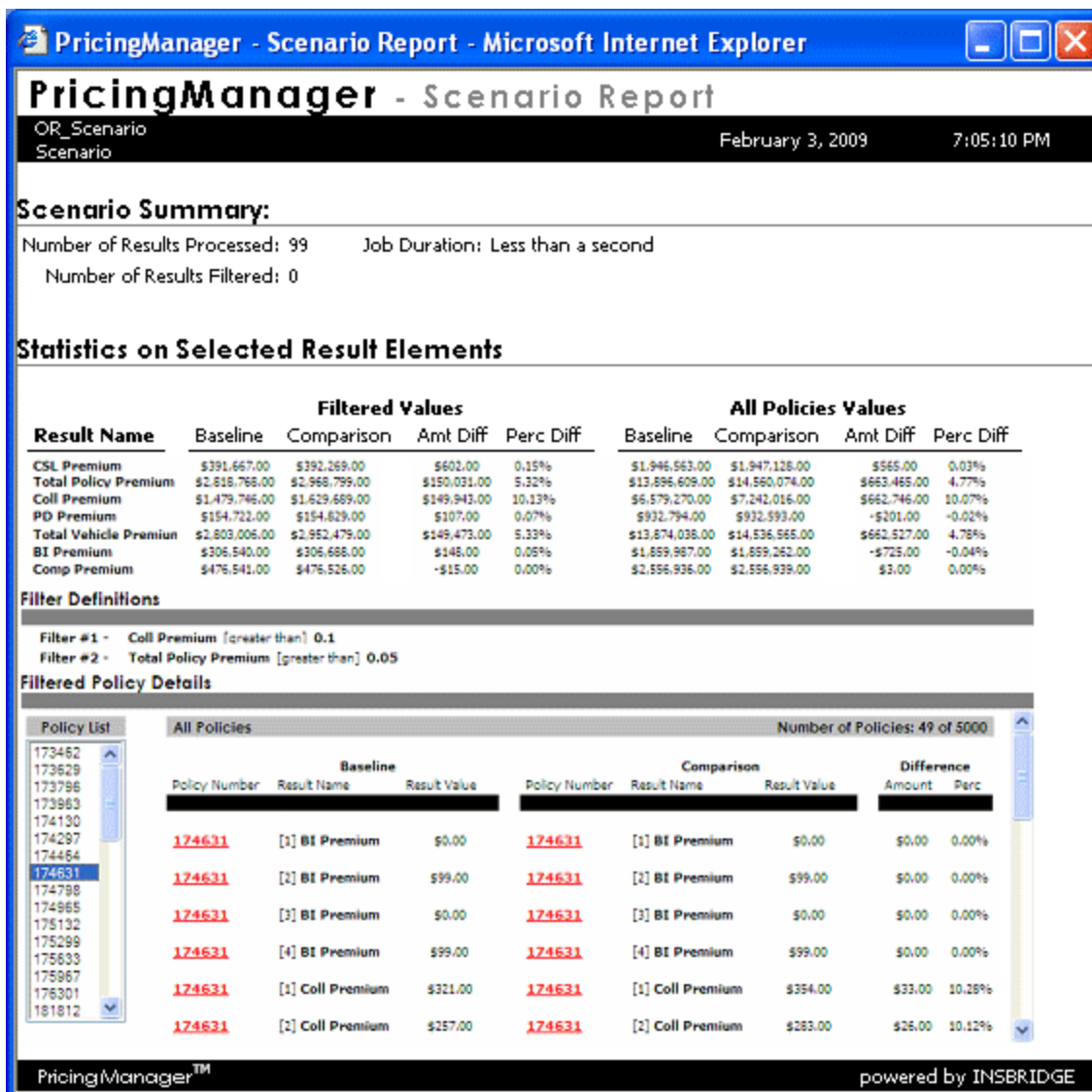


Figure 22 PricingManager Scenario Report

Scenario Summary

Number of Results Processed: The total number of policies.

Number of Results Filtered: The total number of policies that met the filter.

Job Duration: Total time taken for the report to be generated.

Statistics on Selected Result Elements

Displays all results that have been flagged, as well as statistical information about the result.

Result Name: The name of the result the information is for.

Filtered Values

- **Baseline:** The total, for the specified result, of all policies that met the filter(s), based on the value in the baseline file.
- **Comparison:** The total, for the specified result, of all policies that met the filter(s), based on the value in the comparison file.
- **Amt Diff:** The dollar difference between the value listed in the **Comparison** column and the value listed in the **Baseline** column, i.e. **Comparison** minus **Baseline**.
- **Perc Diff:** The percent difference between the value listed in the **Comparison** column and the value listed in the **Baseline** column, i.e. **Amt Diff** divided by **Baseline**.

All Policy Values

- **Baseline:** The total, for the specified result, of all policies, based on the value in the baseline file.
- **Comparison:** The total, for the specified result, of all policies, based on the value in the comparison file.
- **Amt Diff:** The dollar difference between the value listed in the **Comparison** column and the value listed in the **Baseline** column, i.e. **Comparison** minus **Baseline**.
- **Perc Diff:** The percent difference between the value listed in the **Comparison** column and the value listed in the **Baseline** column, i.e. **Amt Diff** divided by **Baseline**.

Filter Definitions

A listing of all filters used for the current report.

Filtered Policy Details

Provides a place for you to select and view details about all policies that met the filter. Only the first 150 policies that met the filter will be shown.

Policy List: Shows a list of all policies that met the filter. Choose a policy in the list to view detailed information about each result flagged for that policy.

Baseline

- **Policy Number:** Shows the policy number the results are for. Click the policy number to open the baseline result XML for that policy.
- **Result Name:** The name of the result the information is for. The number in parenthesis denotes the instance number of the result. For example, a [4] next to BI Premium indicates the result is for the fourth vehicle on the policy.
- **Result Value:** The value in the baseline file for the result.

Comparison

- **Policy Number:** Shows the policy number the results are for. Click the policy number to open the comparison result XML for that policy.
- **Result Name:** The name of the result the information is for. The number in parenthesis denotes the instance number of the result. For example, a [4] next to

- BI Premium indicates the result is for the fourth vehicle on the policy.
- **Result Value:** The value in the comparison file for the result.

Difference

- **Amount:** The dollar difference for the result between the value in the comparison file and the value in the baseline file, i.e. **Comparison Result Value** minus **Baseline Result Value**.
- **Perc:** The percent difference, for the specified result, between the value in the comparison file and the value in the baseline file, i.e. **Amount Difference** divided by **Baseline Result Value**.

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.

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