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Preface

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting RateManager User Guide* This guide describes the features and functionality of Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager). RateManager is a component within the Oracle Insurance Insbridge Rating and Underwriting (IBRU) System that enables users to manage the product definition and modification process, including rating and underwriting logic.

Audience

This guide is intended for RateManager users and system administrators who are tasked with creating rating and underwriting logic and managing system features. Users should be familiar with their company's practices and terminology. Advanced users may benefit from having knowledge of their company's current working rate manual.

Notational Conventions

This section explains the conventions used in this book:

- 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*.

NOTE	*For the purposes of this manual, a category will be shown like this: Category*

NOTE	*For the purposes of this manual, a mapped variable will be shown like this: Mapped Variable*

NOTE	*For the purposes of this manual, a calculated variable will be shown like this: Calculated Variable*

NOTE	*For the purposes of this manual, an algorithm will be shown like this: Algorithm*

NOTE	*For the purposes of this manual, an input will be shown like this: Input*

Navigating RateManager

Navigate through Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager) using the top and side bar menus as well as right click menus, which will be pointed out as they occur. 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 RateManager.

NOTE	If you have a popup blocker installed, you will need to disable it for RateManager to work properly. See Appendix A for enabling popups.

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

RateManager, 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

RateManager is a web application that requires certain permissions and controls in order to properly interact with some desktop and file systems. See Appendix A Changing Your Internet Explorer Settings for more information.

NOTE	If you use RateManager 3.x and are upgrading to Internet Explorer 7, the ActiveX Control will need to be registered for the new Internet Explorer 7 browser. Please request the Insbridge Internet Explorer 7 Active X registration executable, **RateManager_IE7.exe,** from Oracle Insurance Support. See IE7 RateManager ActiveX Control Updates for manual update instructions.

Additional Information

For more information, see these Oracle Insurance resources:

- Oracle Insurance IBFA User Guide
- Oracle Insurance IBRU PricingManager User Guide
- Oracle Insurance IBRU BatchManager User Guide

Manual History

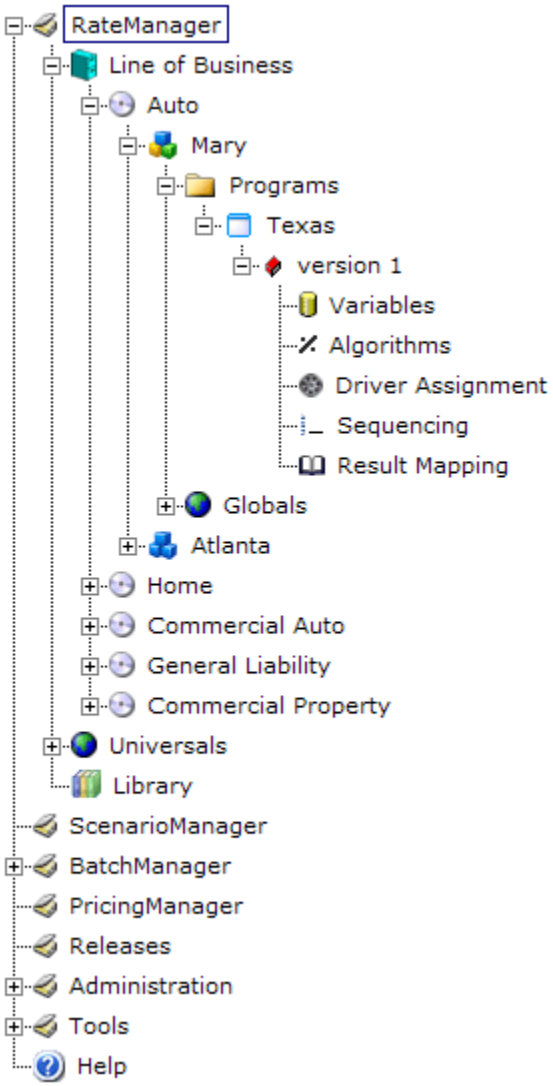
New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-740-01	V 3.5	November 2005	
2nd Edition	P01-740-02	V 3.5	June 2006	Update
3rd Edition	P01-740-03	V 3.6	September 2006	Update Version
4th Edition	P01-740-04	V 3.7	December 2006	Update Version
5th Edition	P01-740-05	V 3.8	July 2007	Update Version
6th Edition	P01-740-06	V 3.8.3	October 2007	Update Version
7Th Edition	P01-740-07	V 3.8.5	November 2007	Update Version
8th Edition	P01-740-08	V 3.8.7	January 2008	Update Version
9th Edition	P01-740-09	V 3.8.8	March 2008	Update Version
10th Edition	P01-740-10	V 3.9	May 2008	Update Version
11th Edition	P01-740-11	V 3.10	September 2008	Update Version
12th Edition	P01-740-12	V 3.11	December 2008	Update Version
13th Edition	P01-740-13	V 3.12	July 2009	Update Version

1

RateManager Overview

RateManager allows users to manage rate programs through the definition of variables, algorithms and underwriting rules. The RateManager system uses the same overall structure for any rate program. Within each line of business (Auto, Home, Fire, etc.), you can have an unlimited number of programs under an unlimited number of folders. Within each program, the system uses inputs and translates those into variables both mapped and calculated. These inputs and variables are then used in algorithms and underwriting rules, producing specific results.



Access to your company's products and programs is gained through a login screen. Your system administrator supplies login names and passwords. The RateManager home page displays the user's registered name and the subscriber and programs they are authorized to use.

Access to the pages you are authorized to view or change is gained by clicking once on the RateManager title from the menu tree located at the left of the screen. Under RateManager, each line of business for which you have access is displayed. If you have been granted edit privileges, you can add or change information.

Select a program by clicking on the subline, folder and then clicking on the program name from the menu tree. You will notice a version number under the program name. Multiple versions may be stored and maintained for each program created. Clicking on the version number will allow you to modify elements within that specific version.

RateManager can be accessed by going to http://<yourserver>/rm, where <yourserver> is the name of the server that RateManager is installed on. If you do not know this information, contact your system administrator.

Getting Started - Data Preparation

Data preparation is a crucial element in minimizing the amount of time it will take to load a program, as well as determining how easily the program can be maintained. The following steps will help you organize what variables need to be created. They also will show you how to set up tables that will assist the program in running at optimal efficiency.

1. Review manual documentation, highlighting all data elements that need to be loaded into the program.

2. List all data that can be grouped together in a single table. Examples would be base rates, violations and factors based on the same inputs, such as model year factors. Mapped variables can be linked together to share a single table (linked variables). This has the following benefits:

    a. A single table needs to be built and imported one time into RateManager.
    b. As changes are made to the program, only one table requires alteration for all variables linked to it.
    c. Decreases rating time because the program has to access the database less.

3. Outline all algorithms that will be needed to produce rates for the program.

4. Review the algorithms for factors that need to be calculated and are not passed as an input. A class factor is usually determined by several other inputs. Listing out ahead of time all elements needed to create this variable, will insure all calculated variables are completed prior to moving on to the algorithm section.

5. Create your excel data tables. Each table must be implemented in a separate **tab-delimited** workbook. The data columns need to be entered so that a result is created. In the example below, the last column, **Territory,** determines the result value in the first column, **BI.** For example, if **Territory** is 1, then **BI** would be 95.

Example Excel Table

BI	Territory
95	1
103	2
131	3
121	4

Restrictions

While RateManager is flexible and accommodating, there are a few restrictions.

1. Names of variables, algorithms, inputs, etc. are limited to 40 characters and cannot contain special characters.

Special Characters

Name	Character
Ampersand	&
Apostrophe	'
Asterisk	*
At Sign	@
Backslash	\
Dollar Sign	$
Equals Sign	=
Exclamation Mark	!
Greater-Than Sign	>
Less-Than Sign	<
Percent Sign	%
Plus Sign	+
Question Mark	?
Quotation Mark	"
Semicolon	;
Tick	`

Figure 1 Special Characters Table

2. Within a program, no two variables can have the same name.

3. Within a program, you cannot have an algorithm and variable with the same name.

4. Mapped variables cannot contain the following characters as part of their default value, data value or criteria value (as indicated): ~, |H, |L, |h, |l.

   The table below indicates which characters can be used where (a Yes indicates it is allowed, while a No indicates it is not allowed):

Name	Character	Default Value	Data Value	Criteria Value
Tilde	~	No	No	No
Bar-H	|H	Yes	No	No
Bar-L	|L	Yes	No	No
Bar-h	|h	Yes	No	No
Bar-l	|l	Yes	No	No

Figure 2 Allowable Special Characters Placement Table

5. Result ID's are limited to 255 characters.

6. Set String/Message steps are limited to approximately 4000 characters and cannot contain special characters.

7. Users are not allowed to remove the last step from any algorithm or calculated variable.

8. Users are not allowed to remove the last algorithm from a sequence.

9. Users are not allowed to package a program that does not have any results mapped.

10. Users are not allowed to package a program that does not have any algorithms in the sequence.

11. Arithmetic comparison operations, such as < (less-than) and > (greater-than), cannot be used on string values. Only the operators of = (equals) and <> (not equals) are allowed with strings.

12. At least one input must be used in the program for each category in the sequence.

Date Masks

The date mask specifies how SoftRater interprets dates being passed into an input file. This allows RateManager and SoftRater to be easily integrated with your existing architecture. The date mask does not affect how dates are entered for mapped variables. Date masks are used when creating programs and lines of business. Date masks may be enabled by the system administrator for imported tables used by mapped variables.

The date mask must contain three things:

- **DD** to represent the two digit day
- **MM** to represent the two digit month
- **YY** to represent the two digit year OR **YYYY** to represent the four digit year

All other characters will be ignored by SoftRater.

Examples

The following examples demonstrate possible values for the date mask, based on the different representations of a date. For example purposes, we will use the date June 13th, 2008.

Date Representation	Possible Date Mask
06/13/2008	MM/DD/YYYY
2008/06/13	YYYY/MM/DD
061308	MMDDYY
1:30 PM 06/13/08	x:xx xx MM/DD/YY

2

Line of Business Management

The Line of Business (LOB) screen gives you a snapshot of all active and inactive lines of business.

NOTE	The line of business screen is available to system administrators only. If you do not have this role, you will not be able to perform these actions.

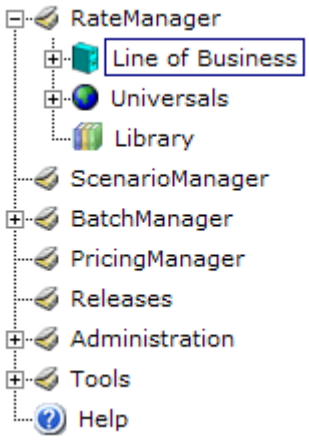
The Line of Business screen allows you to do the following:

- Create a New Line of Business
- Edit a Line of Business
- Activate and Deactivate a Line of Business
- Remove All Programs from a Line of Business

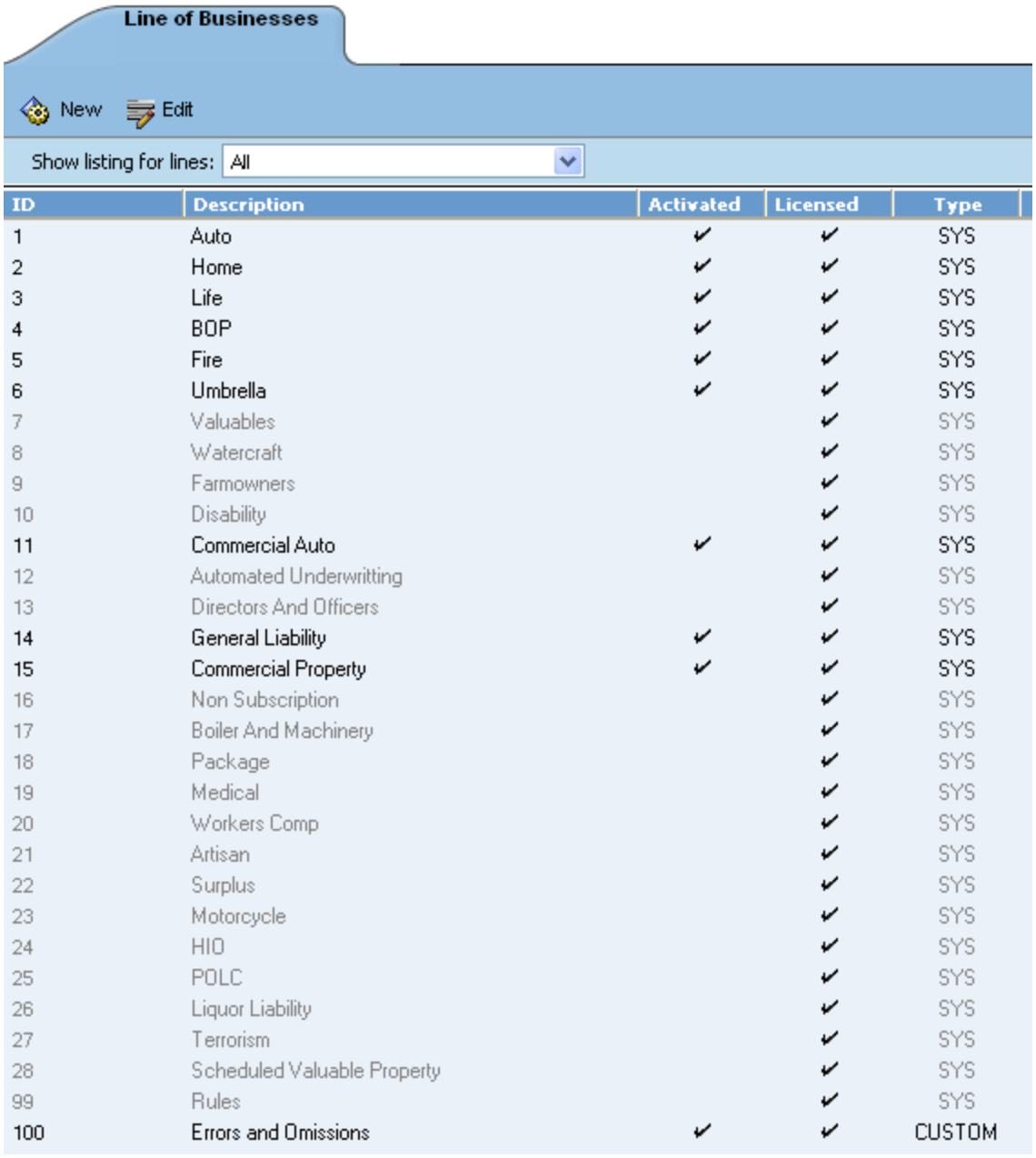
NOTE	Lines of business cannot be deleted. If there is a line of business you no longer need, you can deactivate it. This will stop the line from being listed and being available.

Navigating to the Line of Business Screen

1. From the menu tree, expand **RateManager** and select **Line of Business**.



2. This will display the **Line of Business Screen**.



ID	Description	Activated	Licensed	Type
1	Auto	✔	✔	SYS
2	Home	✔	✔	SYS
3	Life	✔	✔	SYS
4	BOP	✔	✔	SYS
5	Fire	✔	✔	SYS
6	Umbrella	✔	✔	SYS
7	Valuables		✔	SYS
8	Watercraft		✔	SYS
9	Farmowners		✔	SYS
10	Disability		✔	SYS
11	Commercial Auto	✔	✔	SYS
12	Automated Underwritting		✔	SYS
13	Directors And Officers		✔	SYS
14	General Liability	✔	✔	SYS
15	Commercial Property	✔	✔	SYS
16	Non Subscription		✔	SYS
17	Boiler And Machinery		✔	SYS
18	Package		✔	SYS
19	Medical		✔	SYS
20	Workers Comp		✔	SYS
21	Artisan		✔	SYS
22	Surplus		✔	SYS
23	Motorcycle		✔	SYS
24	HIO		✔	SYS
25	POLC		✔	SYS
26	Liquor Liability		✔	SYS
27	Terrorism		✔	SYS
28	Scheduled Valuable Property		✔	SYS
99	Rules		✔	SYS
100	Errors and Omissions	✔	✔	CUSTOM

Figure 3 Line of Business Screen

Navigation Bar

New: Starts the process of creating a new line of business. See Creating a New Line of Business for more information.

Edit: Edits the currently selected line of business.

Show listing for lines: Allows you to view LOBs by activation status. Select the status you want to view from the drop down menu. The screen will refresh with your choice.

Line of Business Listing

ID: The unique identifier assigned to each line of business. Once assigned, these numbers cannot be changed.

Description: The name of the line of business.

Activated: A check in this column indicates that the line of business has been activated and is ready for use. Any line of business that is grayed out is not currently activated.

Licensed: A check in this column shows that the line of business is ready for use.

Type: Shows whether the line is:

- **System** built. System built lines of business are the standard lines that were included in the original download of the system.
- **Custom** built. Custom built lines of business are lines that were added later.

Creating a New Line of Business

Custom lines may be added at any time by a RateManager administrator. LOB ID numbers can be entered manually. This allows you to match any LOB that may be Custom from the Library. LOB ID numbers must fall between 100-250.

To Create a New Line of Business

1. Navigate to the **Line of Business** screen.
2. Click New.
3. In the new line of business popup box, enter an ID number. The number must be an unused number between 100 – 250. If the number is out of range or being used, you will receive an error message. This number cannot be changed after you save.
4. Enter a name. The name may consist of up to 50 characters.

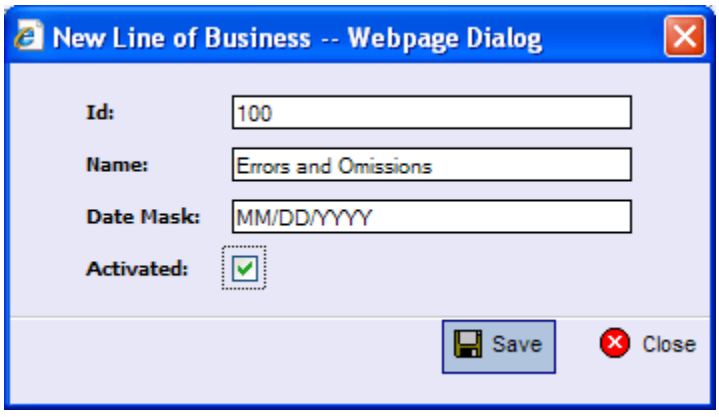


Figure 4 Entering a New Line of Business

5. If needed, enter a date mask. This date format will be used as the default for all programs created within that line of business.

6. By clicking the Activated checkbox, the line of business will be automatically activated after saving.

7. Click Save. The line of business, if activated, should show in the RateManager navigation bar. If it does not appear, click the “Sync Menu” button in the upper portion of the navigation bar.

8. Next, you will need to navigate to **Administration➢Security➢Group Management** to allow variables, algorithms and other program options to be viewed by users.

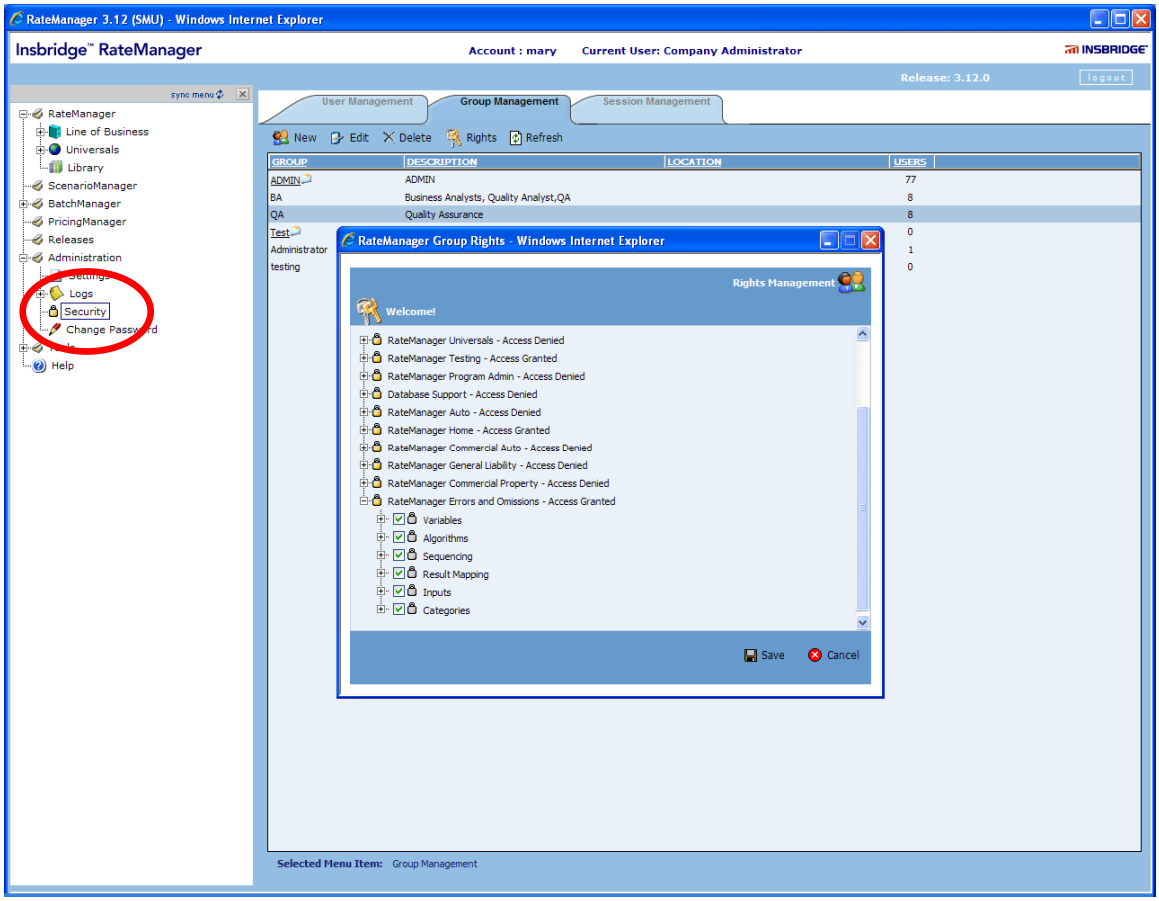


Figure 5 Setting Security for New Lines of Businesses

9. All groups will be denied access to any new line of business. You must allow the groups access before any program options will be available to them. Select the group that will need access to the new line of business.

10. Click on **Rights**. A Rights screen will be displayed. Expand out the new line of business.

11. Place a check in all the boxes where the group will require access. Click **Save**. Users in that group will now be able to view and use the selected options. For more on user groups and rights, see Introduction to Group Management on page 412.

Editing a Line of Business

Any line of business may be edited at any time.

1. Navigate to the **Line of Business** that you want to edit.

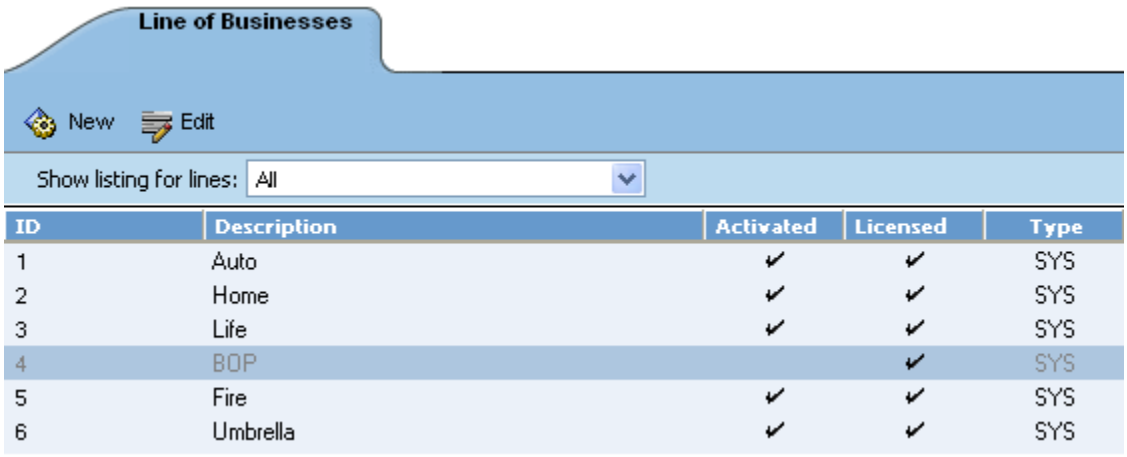


Figure 6 Selecting a LOB to Edit

2. You can double-click the line of business you want to edit or select it and click Edit. You also can right click and select Edit from the menu. The **Edit LOB** popup box will open, allowing you to edit the line of business.

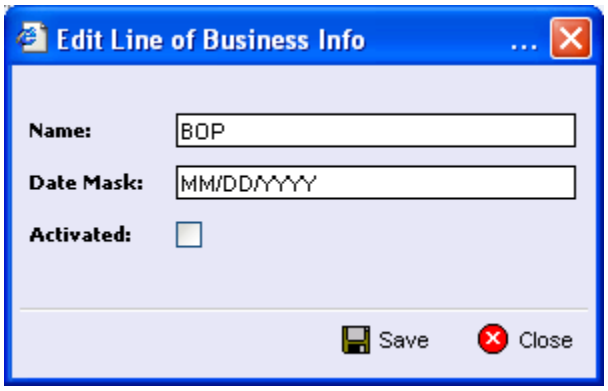


Figure 7 Editing an LOB

3. The Name, Date Mask and Activation status can all be edited. When you are finished, click Save. The line of business will refresh with the changes you made. Click Close to go back to the line of business screen without saving any changes.

Activating and Deactivating a Line of Business

Any line of business may be activated or deactivated at any time. Activating a line of business will display the line and all associated programs on the RateManager menu. Deactivating a line of business will remove the line and all associated programs from the RateManager menu.

1. Navigate to the **Line of Business** that you want to edit.

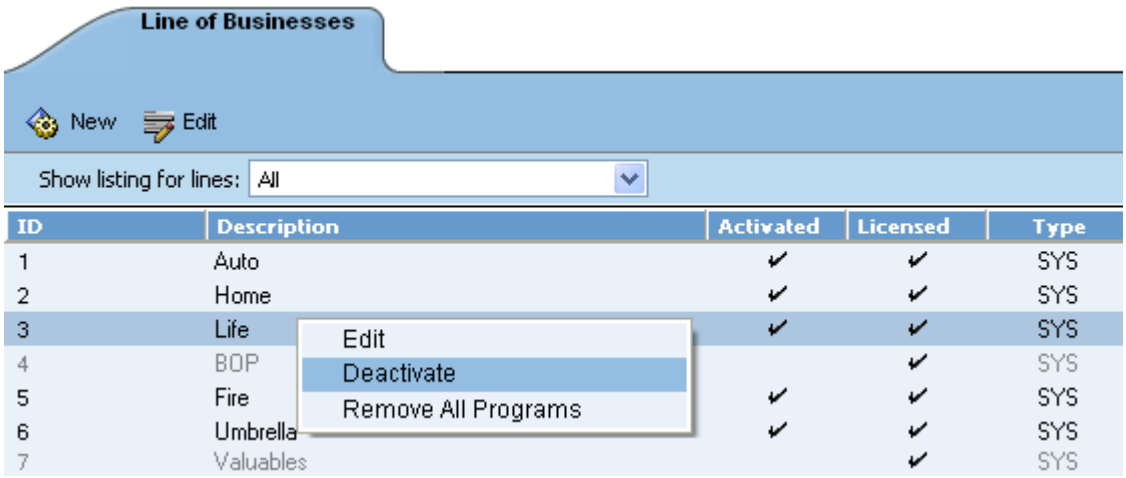


Figure 8 Selecting a LOB to Deactivate

2. **Right click** to get the menu. An Activation will have two menu options; a Deactivation will have three menu options.

3. To activate: Click **Activate**. The screen will refresh and the line of business that you activated will now be displayed on the RateManager menu. You also can activate a line of business by entering the edit screen and selecting Activated.

4. To deactivate: Click **Deactivate**. The screen will refresh and the line of business that you deactivated will not be displayed on the RateManager menu. On the Line of Business screen, the line you deactivated will be grayed out.

Removing All Programs from Line of Business

Any line of business can have all programs removed. Proceed with care, this action cannot be undone and will remove all programs under that line. The sublines will remain in place and all globals under each subline will remain. If you are unsure, you can deactivate a line of business. This will remove the programs from usage but not from the system.

1. Navigate to the **Line of Business** where you want to remove all programs.

2. **Right click** to get the menu.

3. Click **Remove All Programs**. A warning message will be displayed. Click **Yes** to remove all programs. Click **No** to cancel the action.

3

Sublines of Business

Lines of business are separated into *sublines*. Sublines are classifications that fall in between lines of business and program folders. Sublines will allow you to distinguish program sources and also keeps the globals unique within that subline. Globals are subline specific and are not shared across sublines. There are two types of sublines, default and template generated.

- Indicates the **Default** subline
- Indicates **Template** generated sublines

Each line of business will automatically have one default subline placed underneath it. This subline will be named with your subscriber description. The subscriber description was entered by the system administrator when your user account was set up. If your subscriber description is Mary, then underneath every line of business will be a subline named Mary.

NOTE	If you want to change the default subline name, please contact your system administrator and ask to have your subscriber description changed.

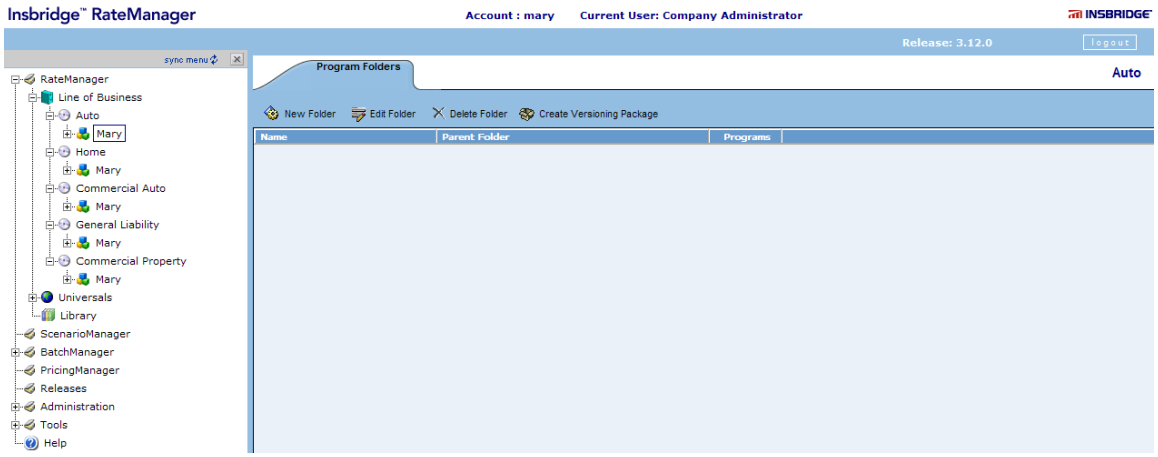


Figure 9 Default Sublines under Each Line of Business

Until you have applied a *template*, any programs that you create will be placed under the default subline. Templates are programs that have been uploaded into the RateManager Library. For more on templates and libraries, please see Library on page 44.

When a template is applied, a new subline will be created for each template *source*. The source is the creator of the template and will also be the name of the new subline. For example, if a template created by the Content Services group is brought into the Auto LOB, a new subline called Content Services will be placed underneath the Auto LOB. Each line of business can have multiple template generated sublines. Sublines cannot be deleted, edited or moved.

When you click on a subline, you will be placed on the *Program Folders* screen. Each subline will have a program folder screen where you can manage the programs and folders for that subline.

Program Folders

The RateManager file management system uses multiple program folders and subfolders (similar to Microsoft Windows Explorer). This is a multi level setup that allows you to place an unlimited number of program folders and subfolders underneath a subline. Using program folders will give you a tree structure that can make it easier to locate a single program when there are a large number of programs to choose from.

RateManager supports an unlimited number of program folders and all program folders are subline specific. Each program folder can contain multiple subfolders and/or multiple programs.

Program Folders Screen

Program Folders allow you to classify and link programs together. This means you can group related programs underneath a major category and then continue to further define the structure until you reach the level where it no longer makes sense to subdivide.

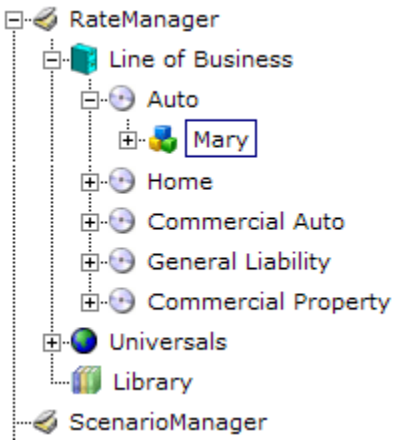
For example, if you have programs that apply to a certain geographical area, you could create one top tier folder for all these programs. Within this folder you may want to create a subgroup that applies only to a specific region within this geographical area. Within the subgroup you may want to create a smaller subgroup that only applies to certain cities within this specific region. You can create as many folders and subfolders as you want and all these folders will be linked together. There is no limit to the number of folders and subfolders you can create.

The Program Folder screen allows you to do the following:

- Create a New Folder
- Edit a Folder
- Move a Folder
- Delete a Folder
- Create a Global Versioning Package

Navigating to Program Folder Listing

1. From the menu tree, select the **line of business**, and then select the **subline** you need.



2. The **Program Folders** listing screen will open.

Figure 10 Navigating to Program Folders Listing

Navigation Bar

New Folder: Begins the process of creating a new folder.

Edit Folder: Allows you to edit the folder name and allows you to move the folder.

Delete Folder: Deletes the currently selected folder.

Create Versioning Package: Creates a global versioning package that is used by SoftRater for automatic version selection. See Creating a Global Versioning Package.

Program Folder Listing

Displays a listing of all program folders under the current subline in alphabetical order.

Name: Name of the folder.

Parent Folder: Displays the pathway for this folder. If the parent folder is the line of business, this is a top tier folder for this subline.

Programs: Shows number of programs contained in the folder.

Creating a New Folder

1. Select the line of business and navigate to the **Program Folders** listing for the subline where you will create the new folder.

2. Click on the New Folder button and a popup box will be displayed. If no folders have been created, the Parent folder will be the line of business. The subline will be directly underneath. The first folder created must fall under the line of business parent folder. For any other folder, you will be able to select the folder pathway. The pathway will be displayed in the Parent Folder field. On the tree view, the final destination where the new folder will be placed will have a box around it.

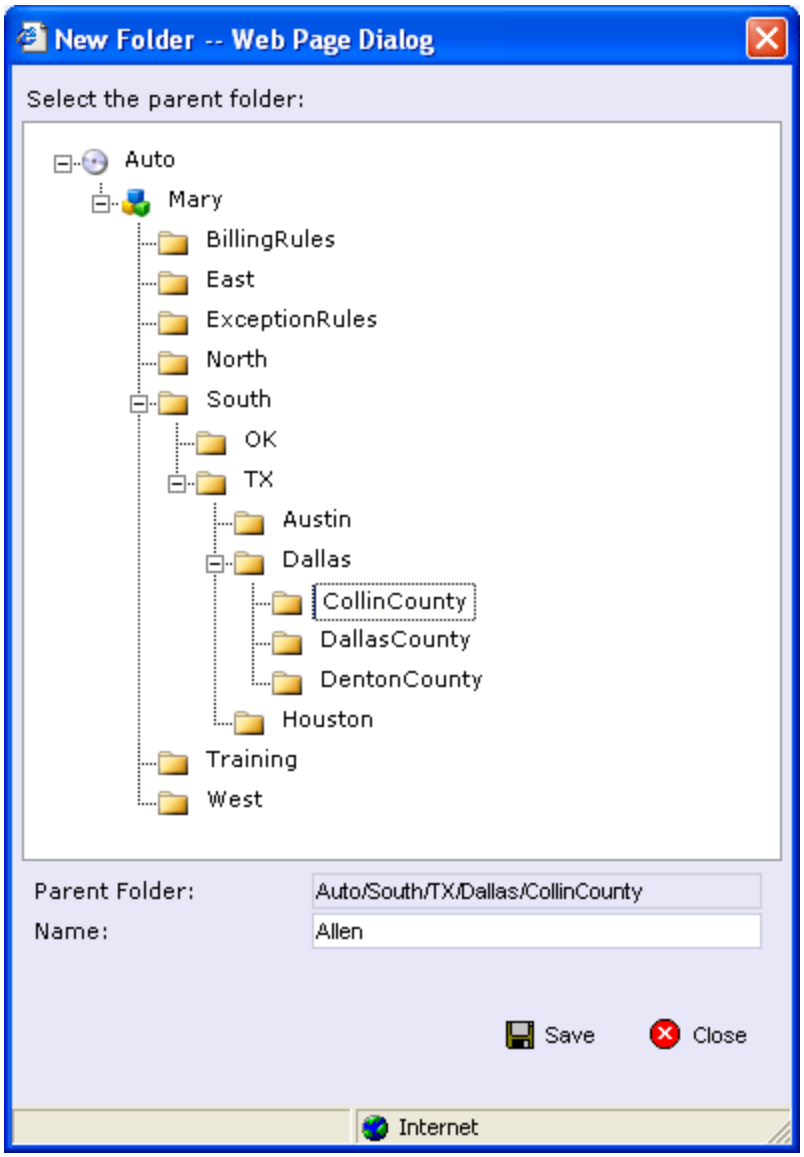


Figure 11 Creating New Folder

3. Enter in a **Name**. Click Save to save your folder. The screen will refresh and the new folder will be displayed in the Program Folders screen.

NOTE	Oracle Insurance recommends that the Folder Name not contain any spaces and that the Folder Names be unique, regardless of the pathway. For example, in Figure 11, no other folder under the Auto line of business, regardless of subline, should be called Allen, the name of the newly entered folder.

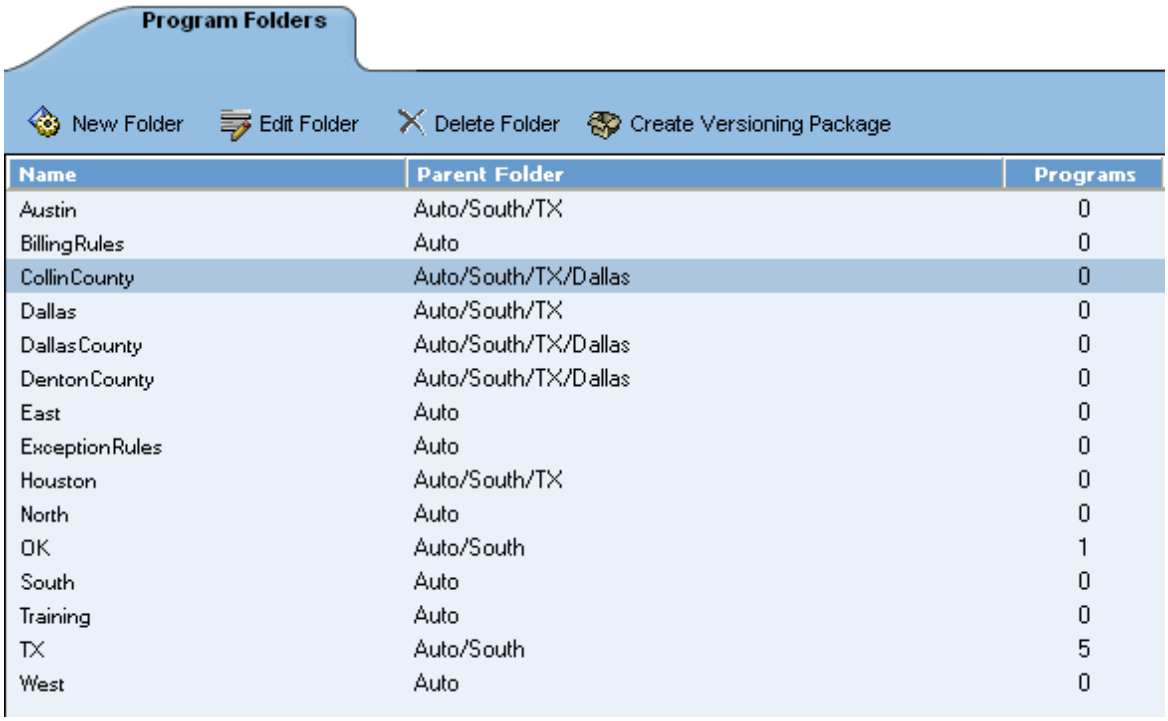
Editing a Folder

Editing a folder allows you to change the folder name and move the folder to a different location within the same subline. You cannot move a folder outside of the subline where it was created. When you change the pathway of any folder, the folders underneath will be changed as well.

NOTE	You can also edit a folder by right clicking any existing folder on the Program Folders listing. This will bring up a menu that will allow you to add, edit or delete.

To Edit a Folder Name

1. Select the line of business, and navigate to the **Program Folders** listing for the subline that contains the folder you want to edit.



Name	Parent Folder	Programs
Austin	Auto/South/TX	0
BillingRules	Auto	0
CollinCounty	Auto/South/TX/Dallas	0
Dallas	Auto/South/TX	0
DallasCounty	Auto/South/TX/Dallas	0
DentonCounty	Auto/South/TX/Dallas	0
East	Auto	0
ExceptionRules	Auto	0
Houston	Auto/South/TX	0
North	Auto	0
OK	Auto/South	1
South	Auto	0
Training	Auto	0
TX	Auto/South	5
West	Auto	0

Figure 12 Selecting a Folder to Edit

2. Either double click the folder you want or select it and click Edit Folder. The **Edit Folder** popup box will open.

3. If you have a name change, make your changes and click Save. The Program Folders listing will refresh with the changes you made. Click Close to go back to the Program Folders listing without saving changes.

Moving a Folder

Moving a folder allows you to change the folder location within the same subline. You can move any folder either up or down the folder structure. When you move a folder, all associated programs and subfolders are moved as well. There is no limit to the number of times a folder can be moved. Moving is performed on the Edit Folder window.

To Move a Folder

1. Select the line of business and navigate to the **Program Folders** listing for the subline that contains the folder you want to move.

2. Either double click the folder you want or select it and click Edit Folder. The **Edit Folder** popup box will open.

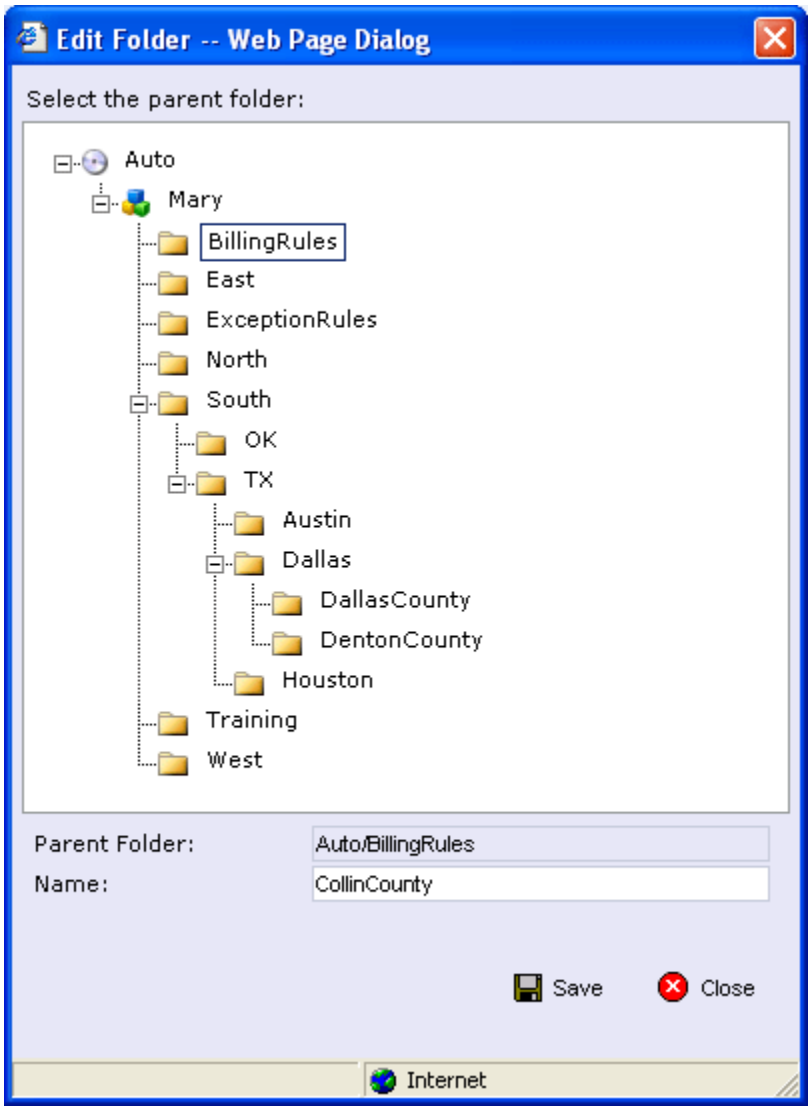


Figure 13 Moving a Folder

3. The folder you have selected to move will be displayed in the Name field but will not be displayed in the tree structure. Double click the folder where you want to move. The Parent Folder field will reflect the new path for the folder. Click Save. The Program Folders listing will refresh with the changes you made. Click Close to go back to the Program Folders listing without saving changes. Any subfolders will be moved as well.

NOTE	You can also open the Edit Folder window by right clicking the folder you want to move. This will bring up a menu that will allow you to add, edit or delete.

Deleting a Folder

If a folder is no longer needed, it can be deleted. Make absolutely sure that the programs for the folder are no longer needed. Deleting a folder deletes all programs under that folder only. Subfolders and any programs in the subfolders will not be deleted but will now be unlinked. Folders that are unlinked are no longer accessible or visible on the left hand side menu. Unlinked folders can be viewed in the Program Folders listing screen. Unlinked folders are grayed out.

To access a subfolder whose parent folder has been deleted, you will have to move the subfolder to a visible folder. All visible parent folders will be located on the left hand side of the RateManager window. Any subfolders underneath will be moved as well. It is recommended that any subfolders either be moved or deleted prior to deleting the parent folder. You also can delete a top tier folder to unlink all subfolders rather than deleting folders.

To Delete a Folder

1. Select the line of business and navigate to the **Program Folders** listing screen for the subline where you want to delete a folder.
2. Select the folder you want to delete and click Delete Folder.
3. You will be asked to confirm deletion of the folder.

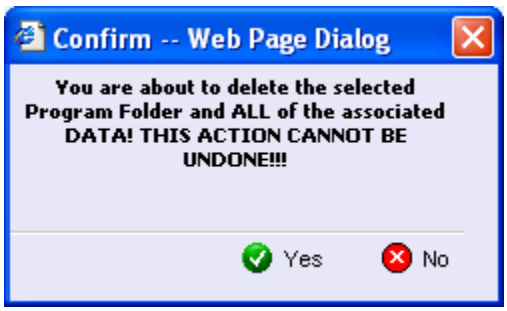


Figure 14 Deleting a Folder

4. Select **Yes** to confirm deletion or **No** to return to the Program Folders listing without deleting the folder.
5. You will be asked again to confirm deletion of the folder.

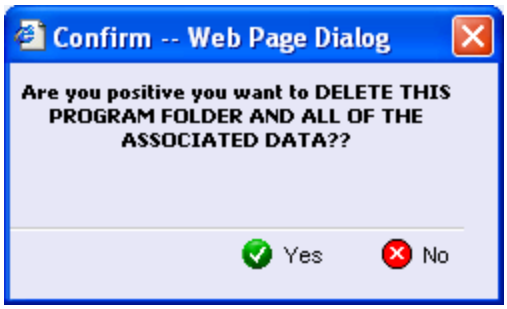


Figure 15 Confirming a Folder Delete

6. Again, select **Yes** to confirm deletion. The folder and all associated programs will be deleted. Click **No** to return to the Program Folders listing without deleting the folder.

Creating a New Subline

There will only be one default subline. New default sublines cannot be created. A new template generated subline cannot be created from the Program Listing screen. A new subline is created when a template is applied from the Library. The new subline will be displayed underneath the corresponding line of business. For example, if you brought in an auto template, a new subline will be created under the auto line of business. The new subline will be named after the source.

For more on templates and libraries, please see Library on page 44.

Creating a Global Versioning Package

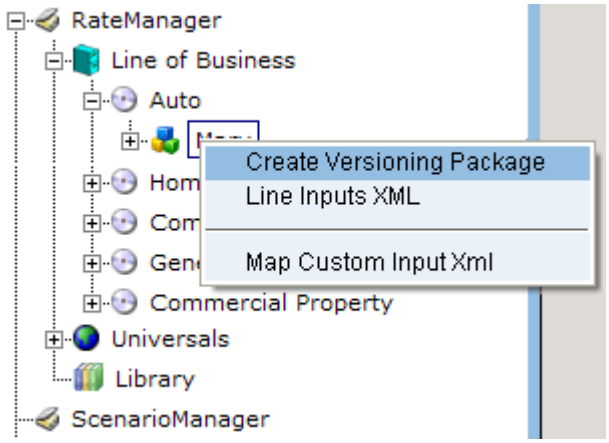
In order for SoftRater to automatically choose the version of a program to rate, a global versioning package (or versioning package) must be created. A versioning package is global to all programs under a particular subline. Only one versioning package needs to be created for each subline. Create a new versioning package anytime you make changes to the way program versions are selected for a program.

Versioning packages are created the same way program packages are created, except they are created from the subline Programs Folders screen. For more information on versioning, see Introduction to Versioning.

To Create a Global Versioning Package - Allowing for Override

There are two ways to create a versioning package.

The **first** way is to right click any subline and select Create Versioning Package.



This will pull up the global versioning package popup screen and allow you to create a versioning package for that subline. This feature can be used at any time and does not require you to leave the screen you are currently working in.

The **second** way is to:

1. Select the line of business and navigate to the **Program Folders** for the subline where you want to create a versioning package.

2. Click Create Versioning Package. The following popup window will open, allowing you to set options for the package.

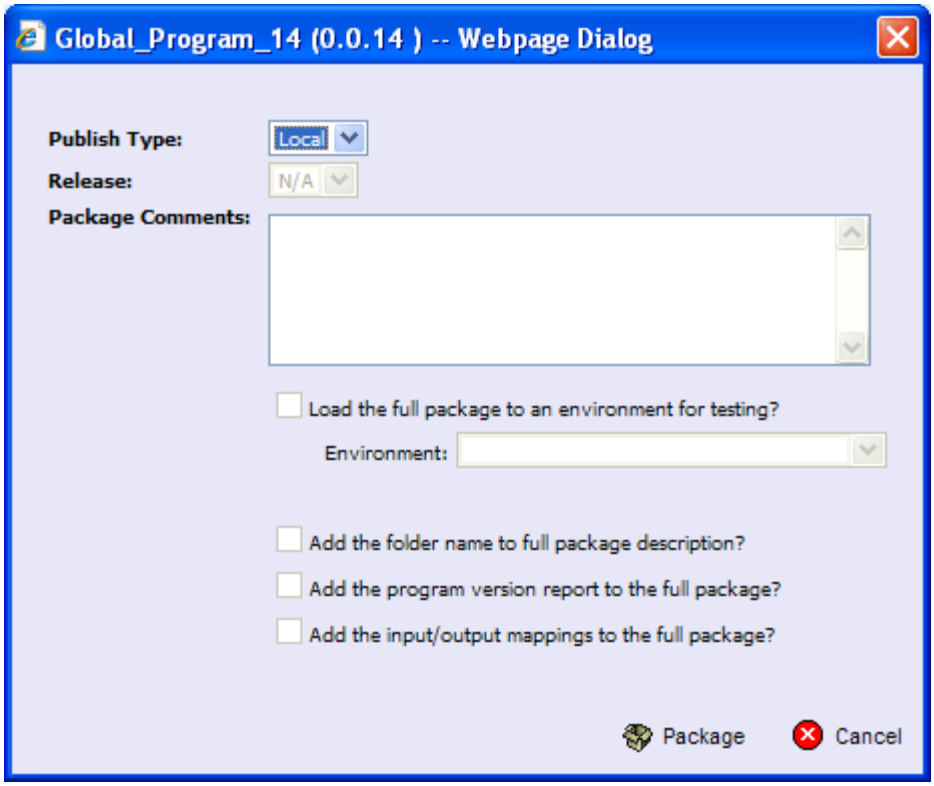


Figure 16 Creating a Global Versioning Package

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 in. 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 a 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. This option will be available if the system has been setup to allow release override.

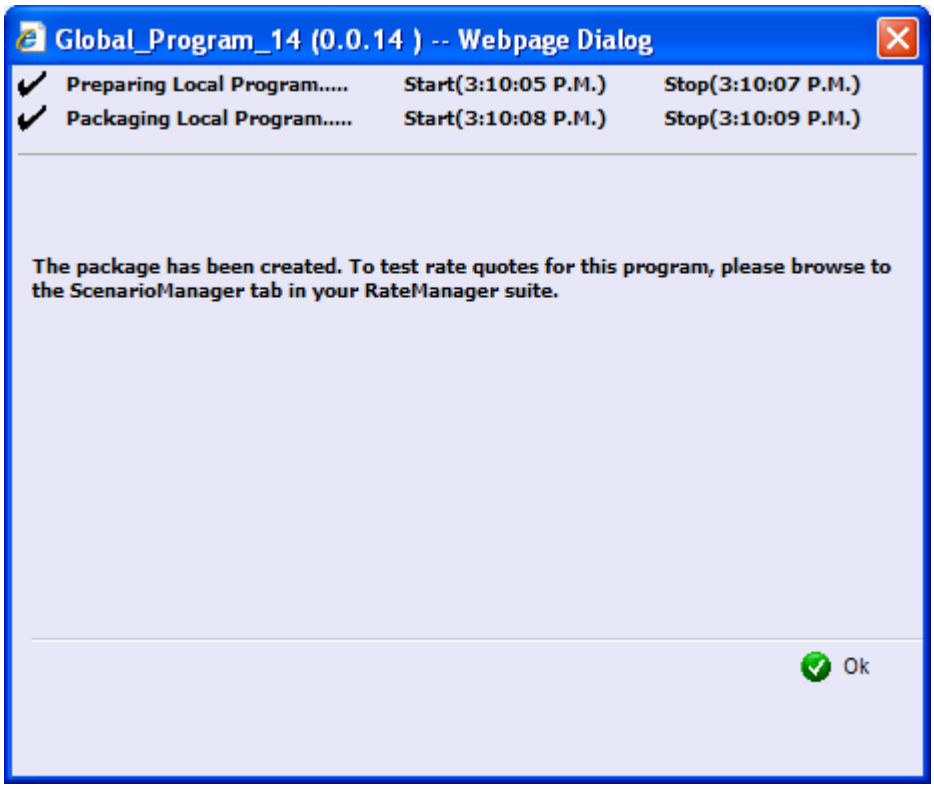
Environment: You can select the environment that the testing package will be loaded to. This option will be available if the system has been setup to allow release override.

Add the folder name to full package description? Check if you would like to add the folder name to the full package description.

Add the program version report to the full package? Check if you would like to add the program version report to the full package. See Program Version Report.

Add the input/output mappings to the full package? Check if you would like to add the input/output mappings. If no mapping exists, this option will not be displayed.

3. When you have finished setting the package options, click Package. The packaging process will start and the progress will be shown. A summary will be shown when packaging is finished.



4. If you created a local package, you can navigate to ScenarioManager to rate input files and test version selection. If you created a full package, you can navigate to the SoftRater Explorer to load the package.

Creating a Global Versioning Package – Not Allowing for Override

System administrators set override options. If the system does not allow for overrides, the create global versioning package options screen will have a different look. You will not be able to select the release. All other options will be available.

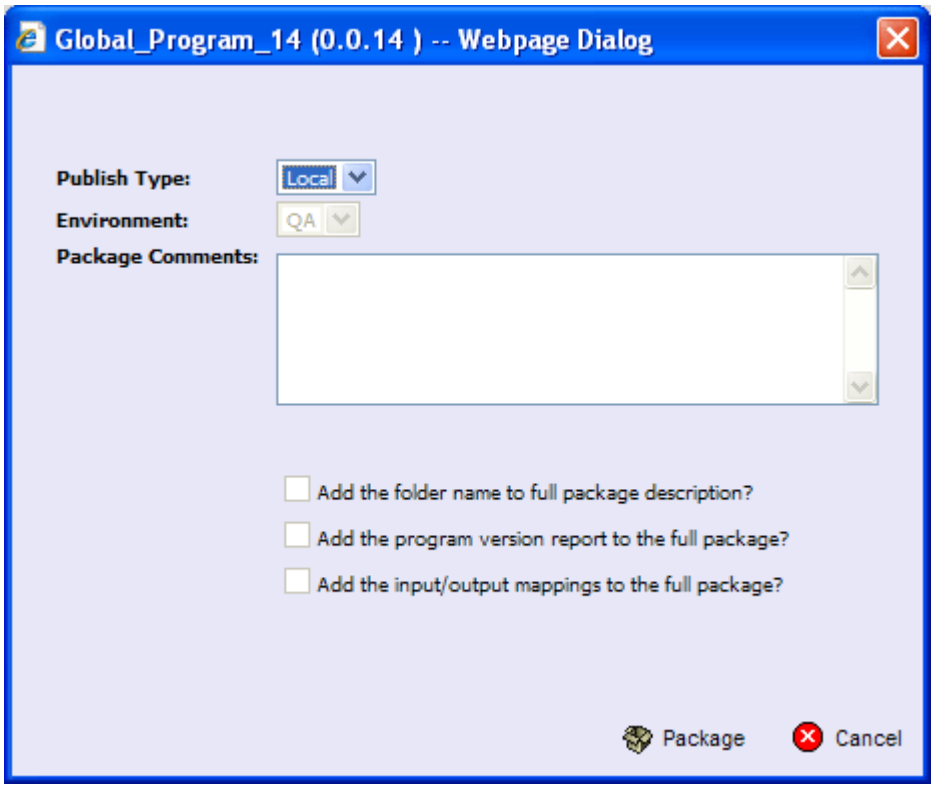
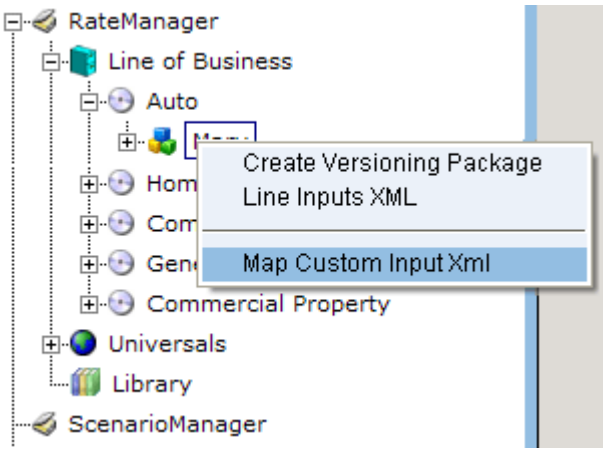


Figure 17 Creating Global Versioning Package Options Not Allowing for Override

Right Click Menu Options

On any individual subline, a right click menu will be available. The selections are:

- **Create Versioning Package –** Allows you to create a package from this version. See Creating a Global Versioning Package.
- **Line Inputs XML** – Clicking this option will bring up the XML screen for this subline. This screen allows you to view, print or copy the XML.
- **Map Custom Input XML** – Clicking this option will bring up the Map Custom Input XML for this subline. See Creating a New Input Mapping.



Selecting any option will pull up the popup screen for that option. These features can be used at any time and do not require you to leave the screen you are currently working in.

Line Inputs XML

Clicking the **Line Inputs XML** menu option will pull up the line inputs XML popup screen and allow you to view, copy or print the line inputs XML for that subline. This feature can be used at any time and does not require you to leave the screen you are currently working in.

To View Line Inputs XML

1. Right click any subline and select **Line Inputs XML**.
2. A popup box will open that allows you to view, copy or print the XML for this subline.

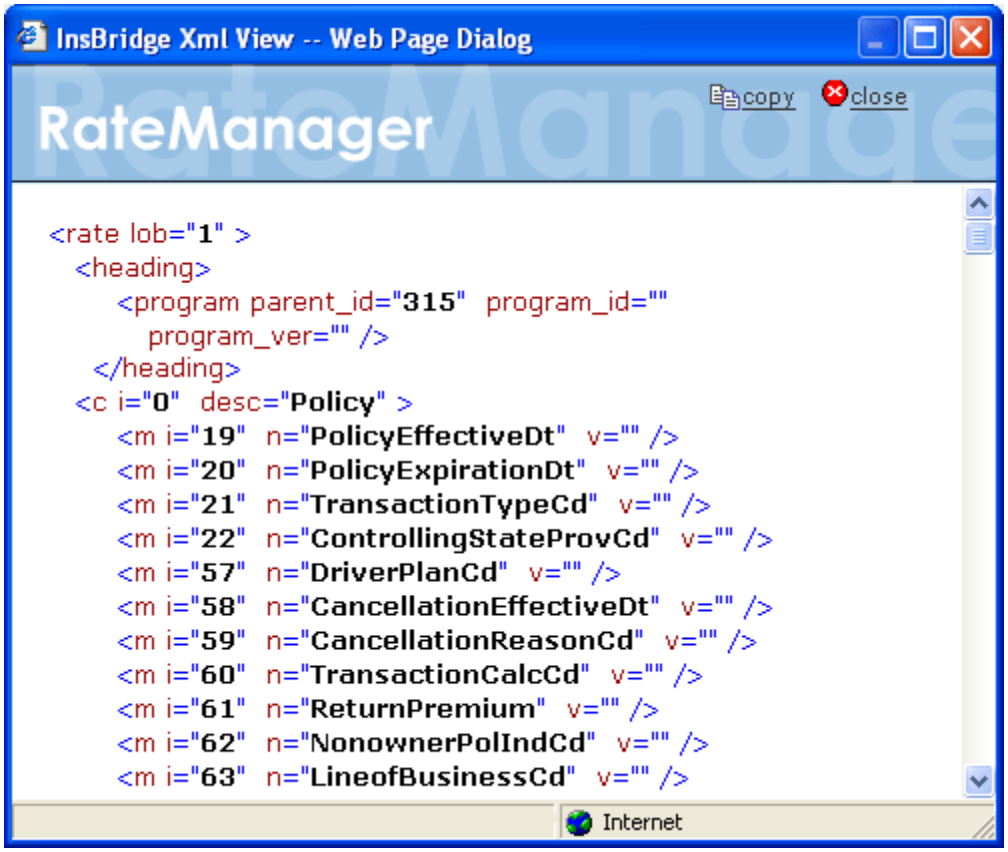


Figure 18 Line Inputs XML

3. Click **close** to close the popup when you are finished.

4

Library

The Library is where templates are stored and managed. 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. Templates can serve as base programs that can be customized to suit your needs.

You can either create templates that other users will import or you can import templates that other users have created. You cannot import a template that you have created back into your subline. This would cause a conflict and result in an error.

Templates are not tied to the original program that they were created from. This means that if the original program is altered, changes will not be brought into the template. If changes are made to the original program, a second version of the template can be created and brought into the library. The template version of variables and algorithms are locked and cannot be edited or deleted however, new versions of the variables and algorithms can be added.

Templates can be imported by users within the group. The system administrators may bring in templates created from other user groups within the company or from outside the company.

NOTE	Library usage depends upon your group rights. If your group has the rights to program import, you will have the right to import templates. If your group has the rights to program export, you will be able to export templates.

Library Screen

The Library Listing screen shows a listing of all templates that have been brought into the library. It also provides the ability to:

- Create a New Template
- Edit a Template
- Save a Template
- Download a Template
- Delete a Template

  Apply a New Template

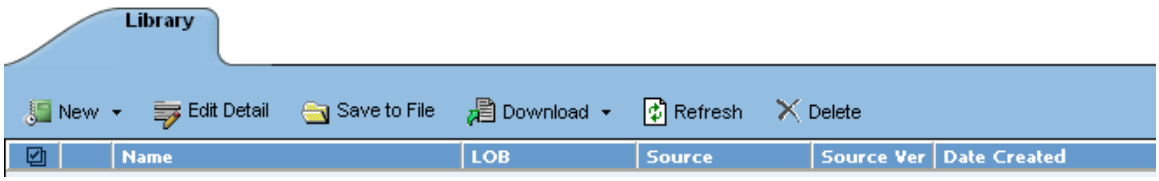


Figure 19 Library Screen

Navigation Bar

The Library screen contains:

New: Begins the process of creating a new program template.

Edit Detail: Allows you to edit the templates that you have created.

Save to File: Saves a copy of the template to your local drive or network.

Download: Allows you to download a template into the library from your local drive or network.

Refresh: Refreshes the screen. You may need to use this when creating new templates.

Delete: Deletes the selected program template.

Program Listing

Shows a listing of all program templates.

Check box: Allows you to check if this is the template to be worked on.

Name: The name of the program template.

LOB: The Line of Business for the program template.

Source: The creator of the program template.

Source Ver: The version of the program the template was created from.

Date Created: The date the program template was created.

Creating a New Template

New templates can be added at any time. There is no limit to the number of templates you can create. You will only be able to create templates out of standard programs. You cannot create a template from a template program.

NOTE	If your group has the rights to import a program, you will have the right to create templates. Only the system administrator can modify these rights. If you cannot create or edit a template, please contact your system administrator.

1. Navigate to the **Library** screen.
2. Click on the **New** button and select **Program Template**. The following popup box will open, allowing you to select the program version you want.

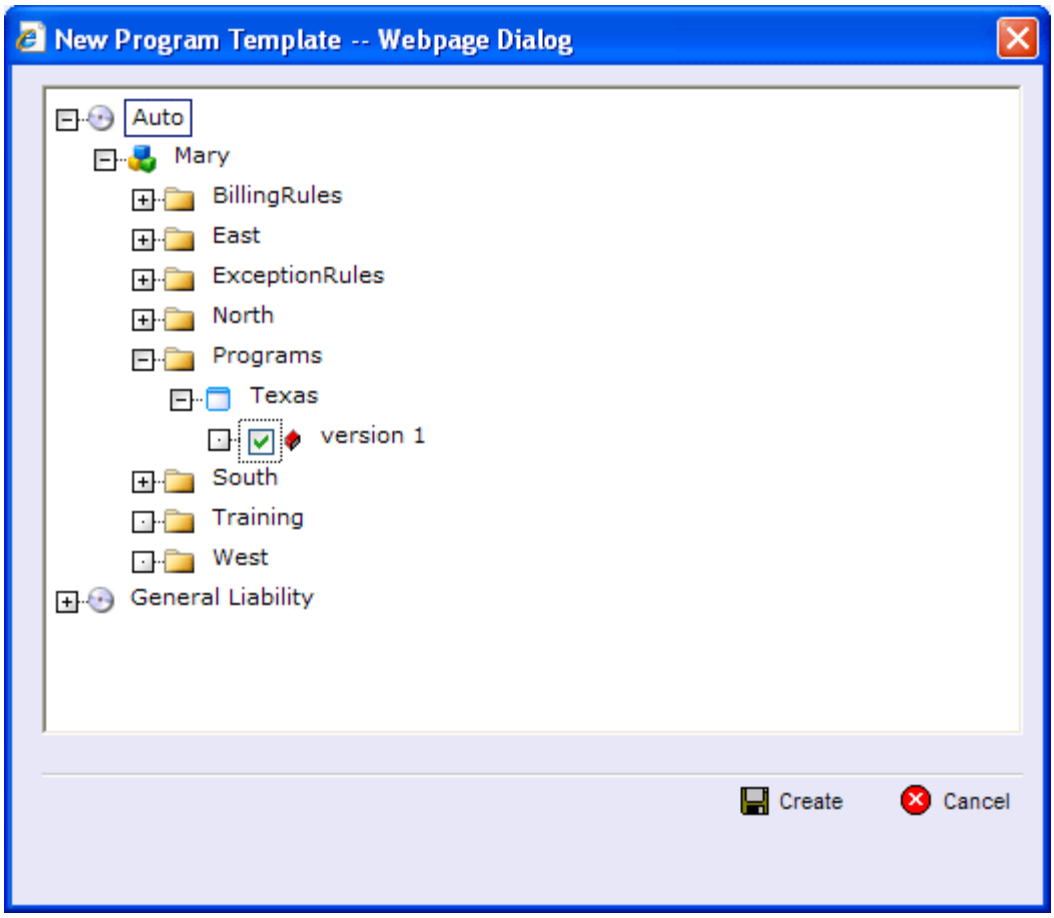


Figure 20 Selecting Program Version for Template

3. Select the **Program Version** you want to use as a template and place a check in the box. You must check the box. Highlighting the version or just a program will not create a template.

NOTE	You can select multiple program versions. Each program version will result in an individual template.

4. Click **Create**. The popup will close and the screen will refresh. Your templates will be listed.

There are two icons that may appear on the library screen:

This icon indicates that the creation process is occurring. If the icon continues, please click the refresh button to refresh the screen.

This icon indicates that there was a problem creating the template. Hover your cursor over the icon to see what the issues are.

NOTE	Packages are not brought in as part of the program. If a program has been packaged, you will need to package again when applied.

Editing a Template

Templates that you have created can be edited at any time. Templates brought in from other sources cannot be edited. If the Save button is not on the Edit Template popup, you will not be able to edit the template. Templates must be edited one at a time.

1. Click on the **Template** you want to edit. A green check mark will be placed in the check box at the front of the row.

2. Click the **Edit Detail** button. A popup will be displayed.

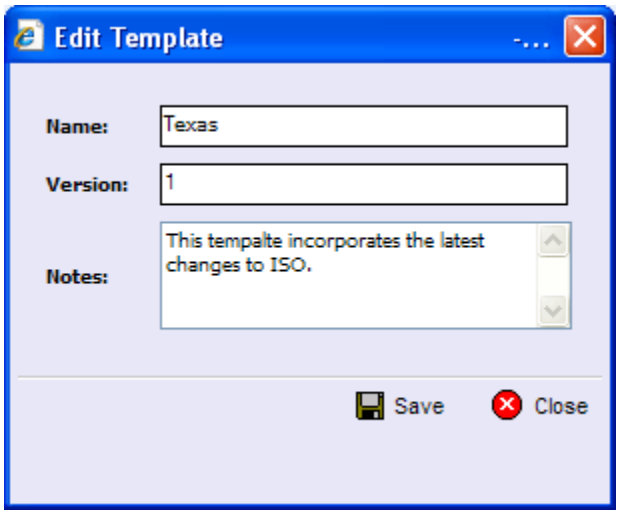


Figure 21 Editing a Template

3. You can change the **Name**, **Version** and enter in **Notes**.

4. When finished, click **Save** to save your entry and close the popup.

Save to File

Save to File allows you to save a template to a local drive or network. Saved templates can then be emailed or shared with other users. Templates must be saved one at a time.

Saving a File

1. Click on the **Template** you want to save. A green check mark will be placed in the check box at the front of the row.

2. Click the **Save to File** button. A separate popup window will be displayed. Select **Save** to save your file. Click **Cancel** if this not the option you want.

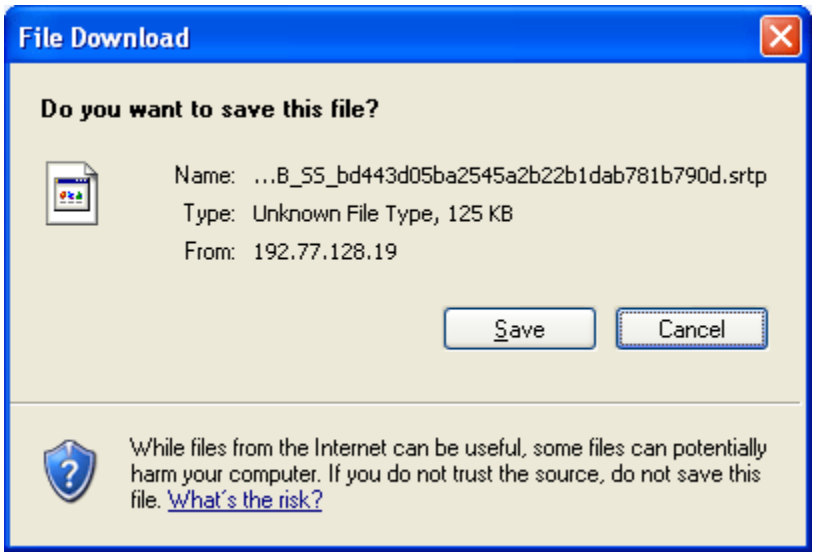


Figure 22 Saving a File

3. Your computers dialogue box will be displayed. Select the location where you want to save the template. Click **Save**.

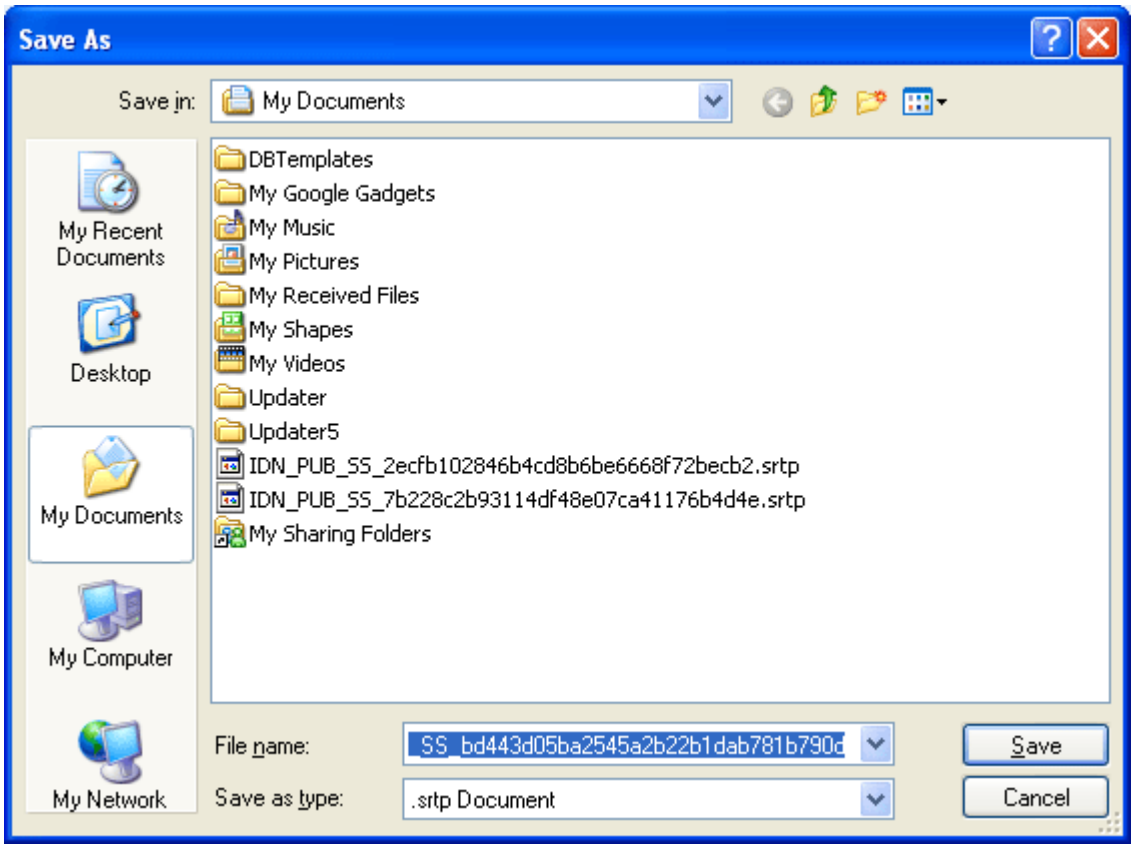


Figure 23 Selecting a Save Location

The name of the template file will be taken from the database, not from the library name. For example, you may have selected the "Dallas" template but when the File Download box is displayed, the Name is displayed as IDN-PUB-SS_bd443d05ba2545a2b22bb1dab781b90d.srtp.

You can change the template file name at the time you are selecting the location to save your template. Highlight the file name and type in the name that you want. This is recommended if you are saving more than one template. It will help you distinguish between templates. Do not change the file extension (.srtp).

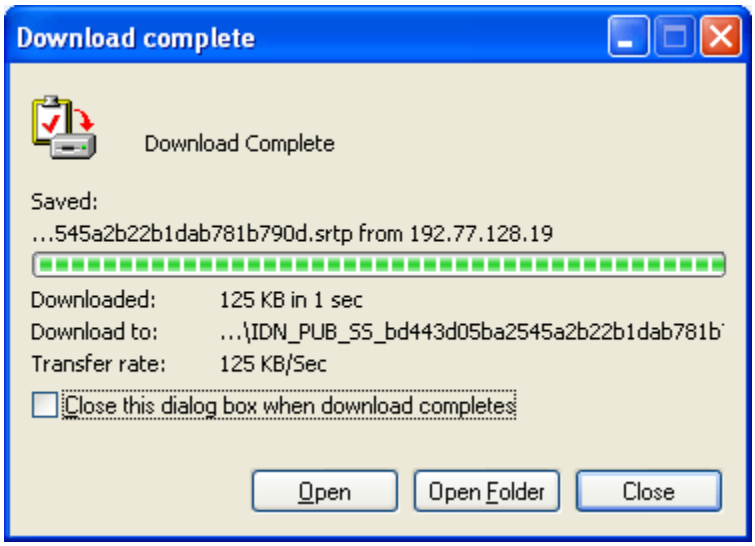


Figure 24 Download Complete

4. When the download is complete you will have the option to Open, Open Folder or Close. Select **Close**. The template file will be on your local drive or network.

NOTE	On most systems, selecting Open will result in an error message and Open Folder will open your computers explorer window.

Be aware that when the file is downloaded into another library, the template name will revert back to the original library name.

For example: You have a template in your library called “Dallas” that another user in another group could utilize. You saved this template to your local hard drive as IDN-PUB-SS_bd443d05ba2545a2b22bb1dab781b90d.srtp. You emailed this template file to the other RateManager user in the other group. This other user saves the file to their local hard drive as IDN-PUB-SS_bd443d05ba2545a2b22bb1dab781b90d.srtp. They then download the file to their library. The file will be displayed in their library as “Dallas”, exactly how it was displayed in your library.

OR: You have a template in your library called “Dallas” that another user in another group could utilize. You changed the template file name and saved it to your local hard drive as Dallas-Version3-8-2008.srtp. You emailed this template file to the other RateManager user in the other group. This other user saves the file to their local hard drive as Dallas-Version3-8-2008.srtp. They then download the file to their library. The file will be displayed in their library as “Dallas”, exactly how it was displayed in your library.

The database generated name or any name you may have given the file will not be displayed. Once the template file is in the library, use the Edit Detail button to change the name to what you need.

Download

Download allows you to bring a template that you have saved on your local drive or network into the library. Downloaded templates may have been sent to you from other users via email or parked on a shared drive by system administrators or other users. Downloads must be done one at a time.

Downloading a File

1. Click on **Download** and select **From File**. A separate popup window will be displayed.

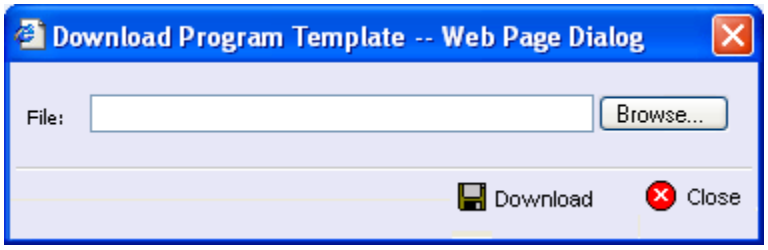


Figure 25 Downloading a Template

2. Click the **Browse…** button, this will pull up your computers dialogue box.

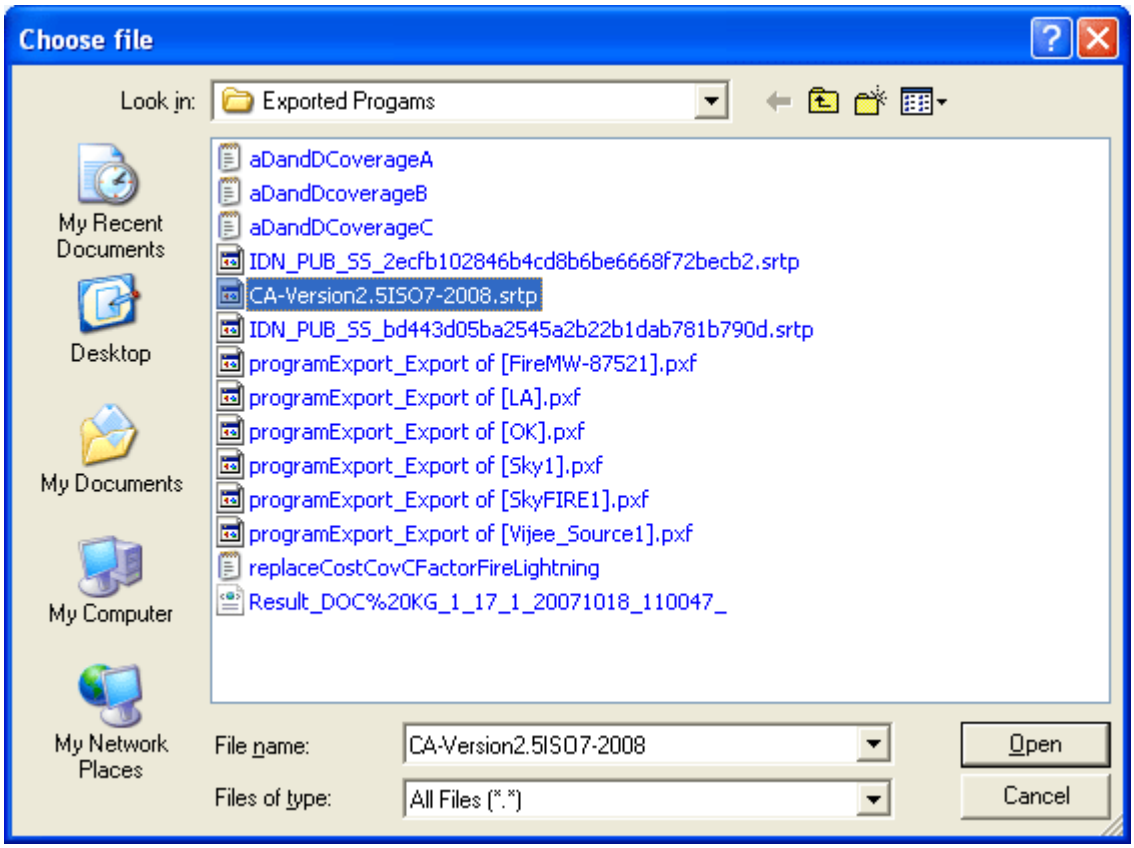


Figure 26 Selecting a Template File to Download

3. Find your file and click **Open**. This will close the dialogue box and return you to the previous popup.

NOTE	Only .srtp file extension types will be allowed. Any other file type will not be accepted.

4. Click **Download** to download the file into your library. If this is not the action you want to take, click **Close**. The file will be displayed in the library with the original file name.

Be aware, the template file name that you download may not be the same when the template is populated into the library. When a template file is saved to a disk or drive, the name used by the file is from the database, not from the library. The template file name may have been changed by the user when the file was saved. It is not mandatory to change file names but it can be helpful to the user to do so. When the template is downloaded into your library, the name will revert back to the original file name. Please check the date created by to verify your template is in the library. Templates in the Library can only have the Name, Version or Notes information changed by the source of the template.

For more on template file naming, see Saving a File on page 47.

Deleting a Template

Templates can be deleted at any time. Deleting a template from the library does not remove the template from the subline. You can select and delete multiple templates.

1. Click on the **Template(s)** you want to delete. A green check mark will be placed in the check box(es) at the front of the row.

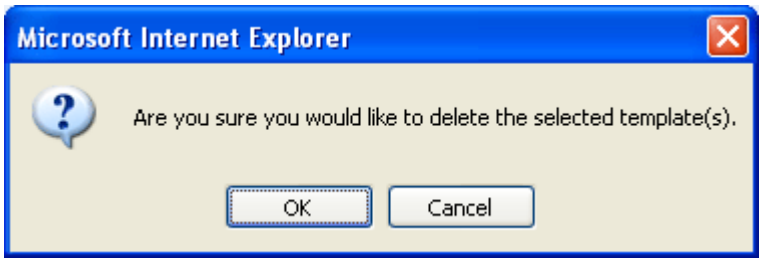


Figure 27 Deleting a Template

2. Click the **Delete** button. A separate popup window will be displayed. Select **OK** to delete the templates. Click **Cancel** if this not the option you want.

Applying a Template

Once a template has been brought into the library, it can be applied. Templates can only be brought in under the line of business they were created in; meaning that a General Liability template cannot be brought in under the Auto line of business. Templates must be applied one at a time.

There are two different methods of applying templates, *New Program* and *Existing Program*. The new program method will create the subline and the programs folder. Most often you will use the new program method when the source is new to the line of business or the template is new to the subline. You also can use the new program method when you want to bring a template in under a different name instead of as a new version under an existing template program.

The existing program method will bring a template into an existing subline and program. Use the existing program method when the subline and the program folder are already established.

For example, the template Collin from source Mary is in the library. If you do not have a Mary subline, you will need to bring it in with the New Program method. When you apply the template to the LOB, the subline Mary will be created and the Programs folder will be created. The program Collin will be placed under the Programs folder as version 1. Any other versions of the template Collin can be brought in with the Existing Program method.

If you wanted to bring the template Collin in again under a different name, you could once again use the new program method. You would have to rename the program when you select the Programs folder location. Renaming the program will create a new program. The version will still be placed in the same subline but as version one of a different Program name.

NOTE	If your group has the rights to import a program, you will have the right to apply templates. Only the system administrator can modify these rights. If you cannot create or edit a template, please contact your system administrator.

Applying a Template – New Program

1. Click on the **Template** you want to apply. A green check mark will be placed in the check box at the front of the row.

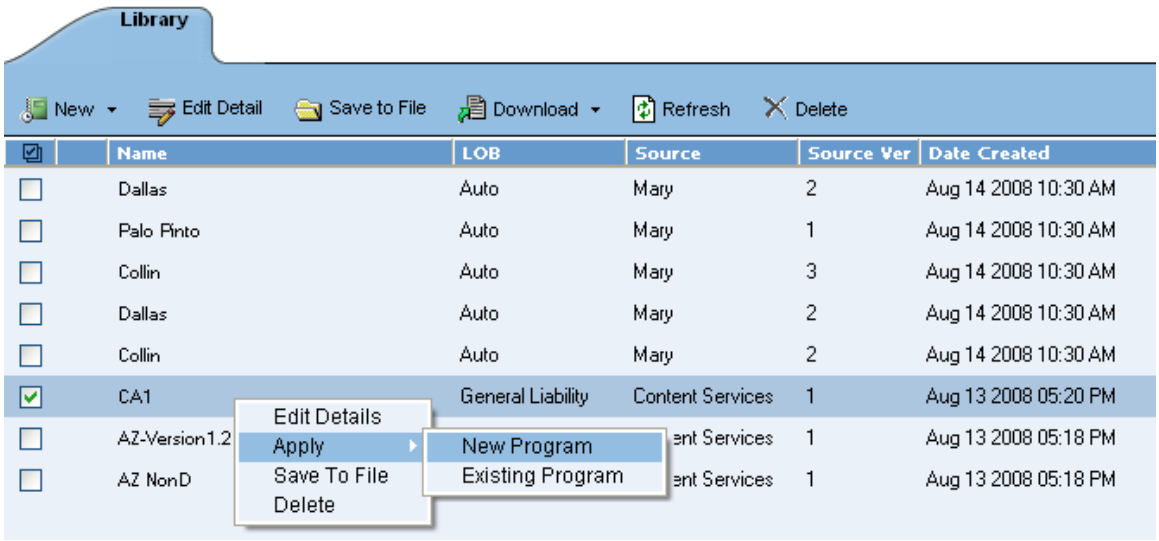


Figure 28 Applying a Template

2. Right click to get the menu. Select **Apply➢New Program**. A separate popup window will be displayed.

   The first time a template is applied by this source under this line of business two items will be created automatically, the subline and a programs folder. The subline will be

placed under the line of business, named the same as the Source that created the template. Directly underneath this subline will be a folder called Programs. For example, if you bring in a general liability template created by Content Services, it will be placed in the general liability line of business, under the subline of Content Services, in the Programs folder.

If the subline and program folder already exist, no additional items will be created.

Source information is taken from the Subscriber ID. It is possible to change the name of the subscriber without changing subscriber ID. If this happens, a new subline will not be created. The template will be populated under the previous subscriber ID name. The new subscriber ID name will not be listed as a subline.

For example, Subscriber ID 461 is originally named Content Services. You have imported templates from Content Services and that created a subline for Content Services in RateManager. Content Services has their name changed to The Template Creation Group. Their subscriber ID has not changed but their name has. In the library, any new templates will now show The Template Creation Group as the source. When you go to import one of these templates, it will be placed in the Content Services subline - the original name. You will not have a new subline created.

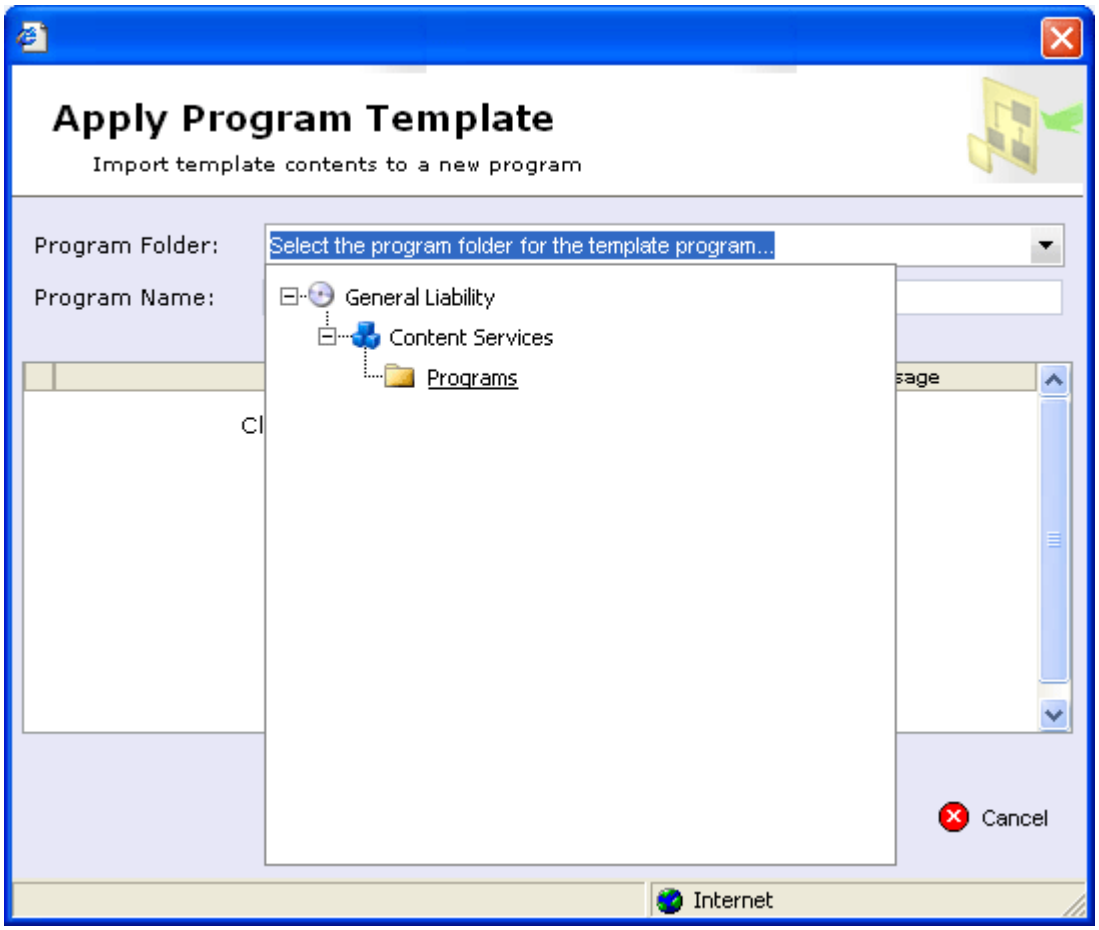


Figure 29 Selecting a Program Folder

3. Select the **Program** folder location from the drop down menu.

NOTE	If this is a new subline, Programs will be the only option. After you apply the template, you can create additional folders but the subline must be established.

4. If you want to change the name of the template, enter in a **Program Name**.

NOTE	Be aware, if the subline and programs folder have already been created, that renaming the template may create another program folder and your template may not be recognized as another version in an existing program folder but as a new program folder.

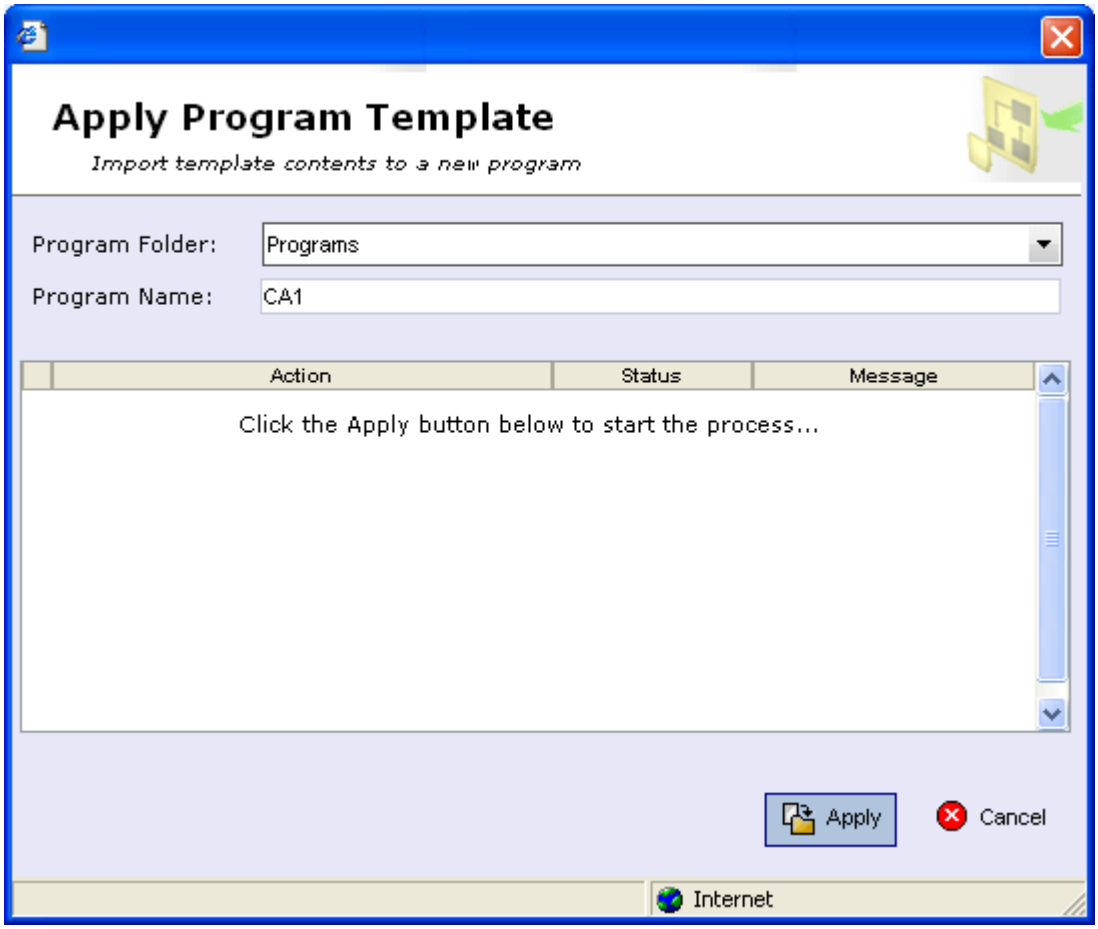


Figure 30 Applying the Template

5. Click

. The screen will list the actions taken and success or failure.

   If the template is successful, the subline and program folder along with the template will be displayed under the correct line of business.

   If the template failed, a failed message will be listed. The Subline and the Program Folder will be created but no template will be listed underneath. If one item fails, the template will not be created. All items must pass.

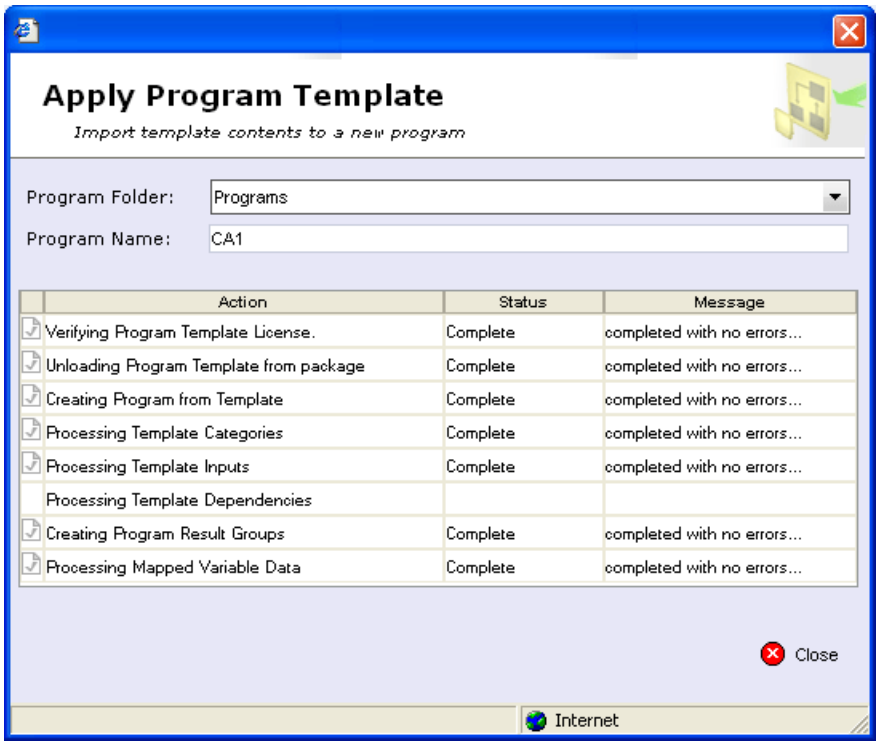


Figure 31 Successful Template

- A **check mark** and a **Complete** status indicate **success**.
- An **X** and a **Failed** status indicate **failure**.
- A blank indicates that this action was not needed.

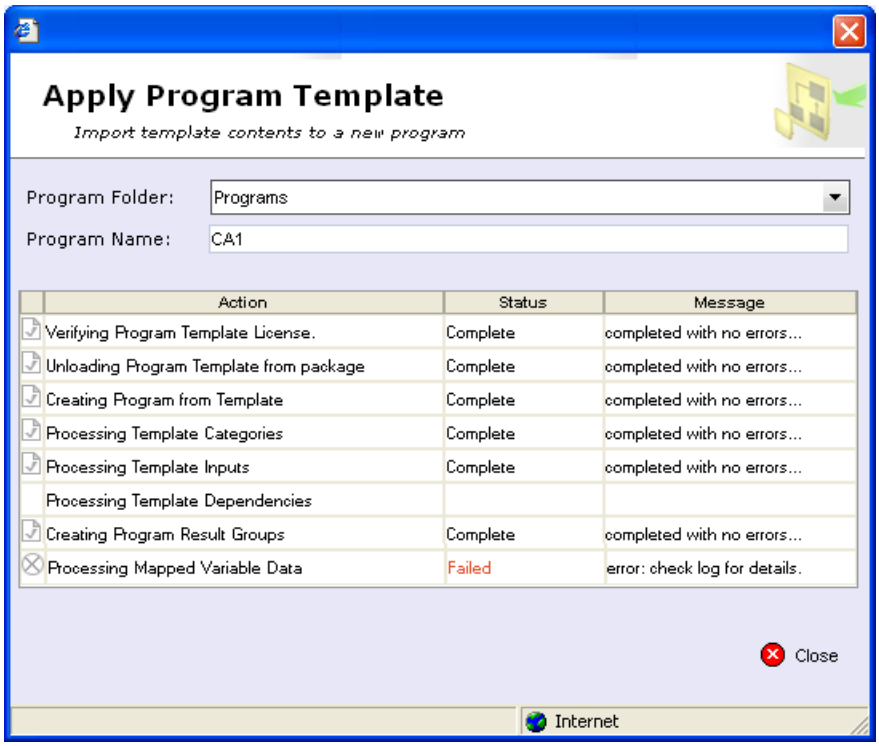


Figure 32 Failed Template

Applying a Template – Existing Program

Use the Existing Program method when applying a template to an already existing subline and programs folder. The new template will be placed as the next available version.

NOTE	If your group has the rights to import a program, you will have the right to apply templates. Only the system administrator can modify these rights. If you cannot create or edit a template, please contact your system administrator.

1. Click on the **Template** you want to apply. A green check mark will be placed in the check box at the front of the row.

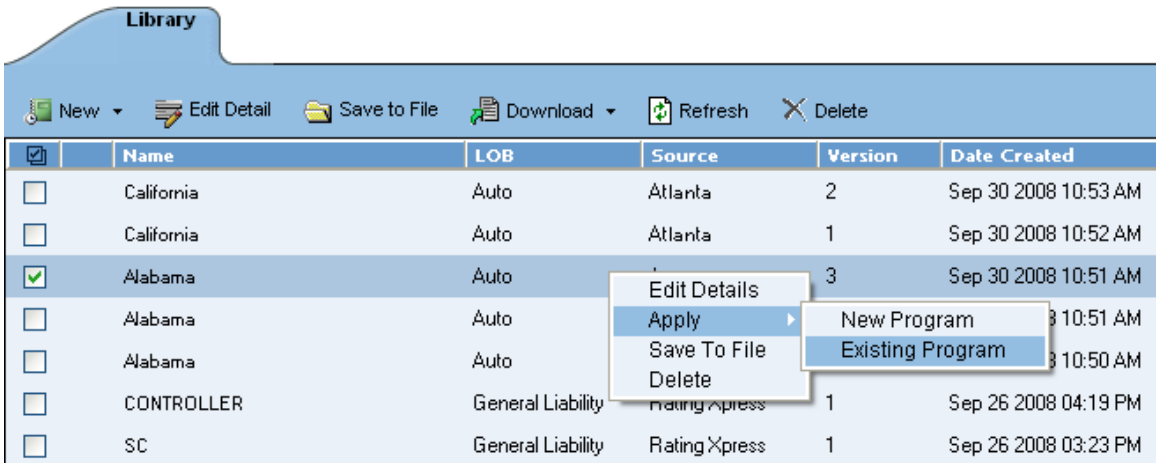


Figure 33 Applying a Template

2. Right click to get the menu. Select **Apply➢Existing Program**. A separate popup window will be displayed.

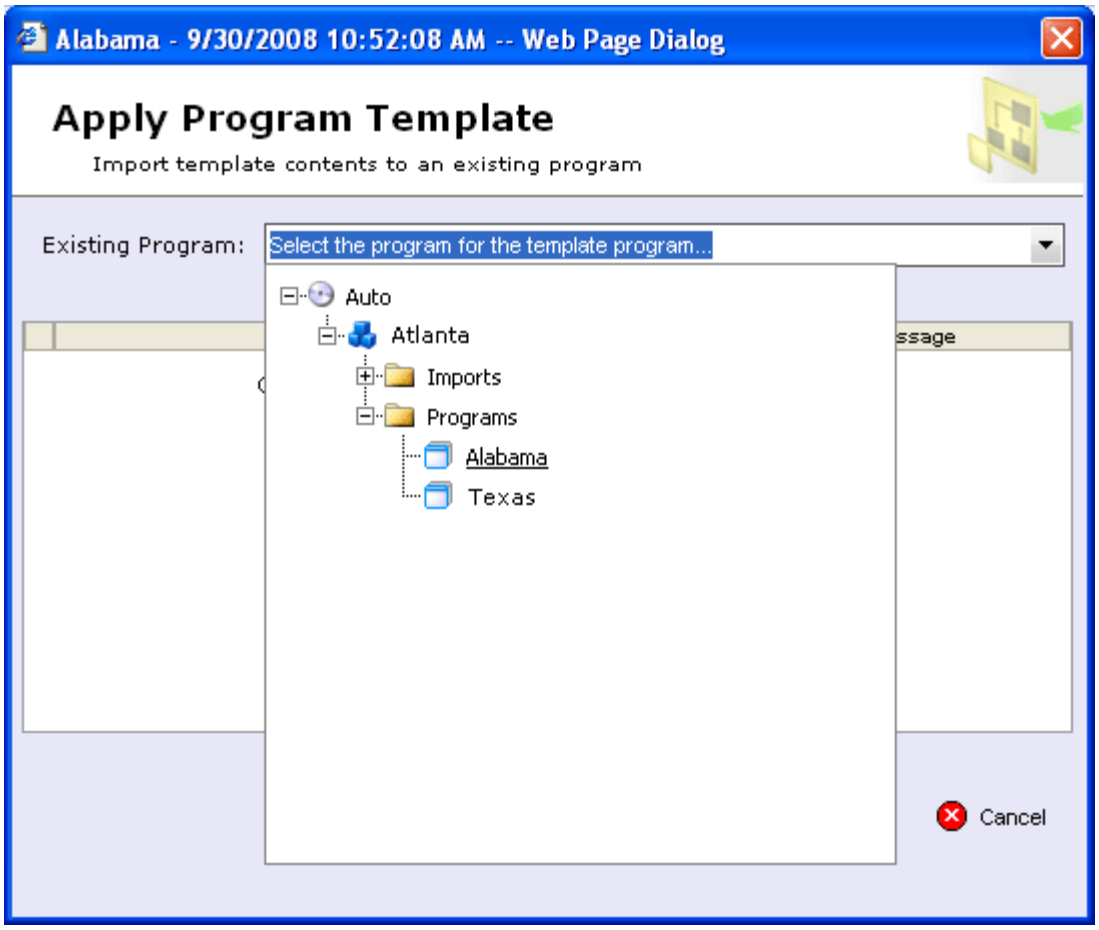


Figure 34 Selecting a Program Folder

3. Select the **Program Folder** location you want from the drop down menu. Then select the final Program where you want to place the new version.

NOTE	You will not be able to change the name of the template. If you want to change the name of the template, you must use the New Program method.

4. Click

. The screen will list the actions taken and success or failure.

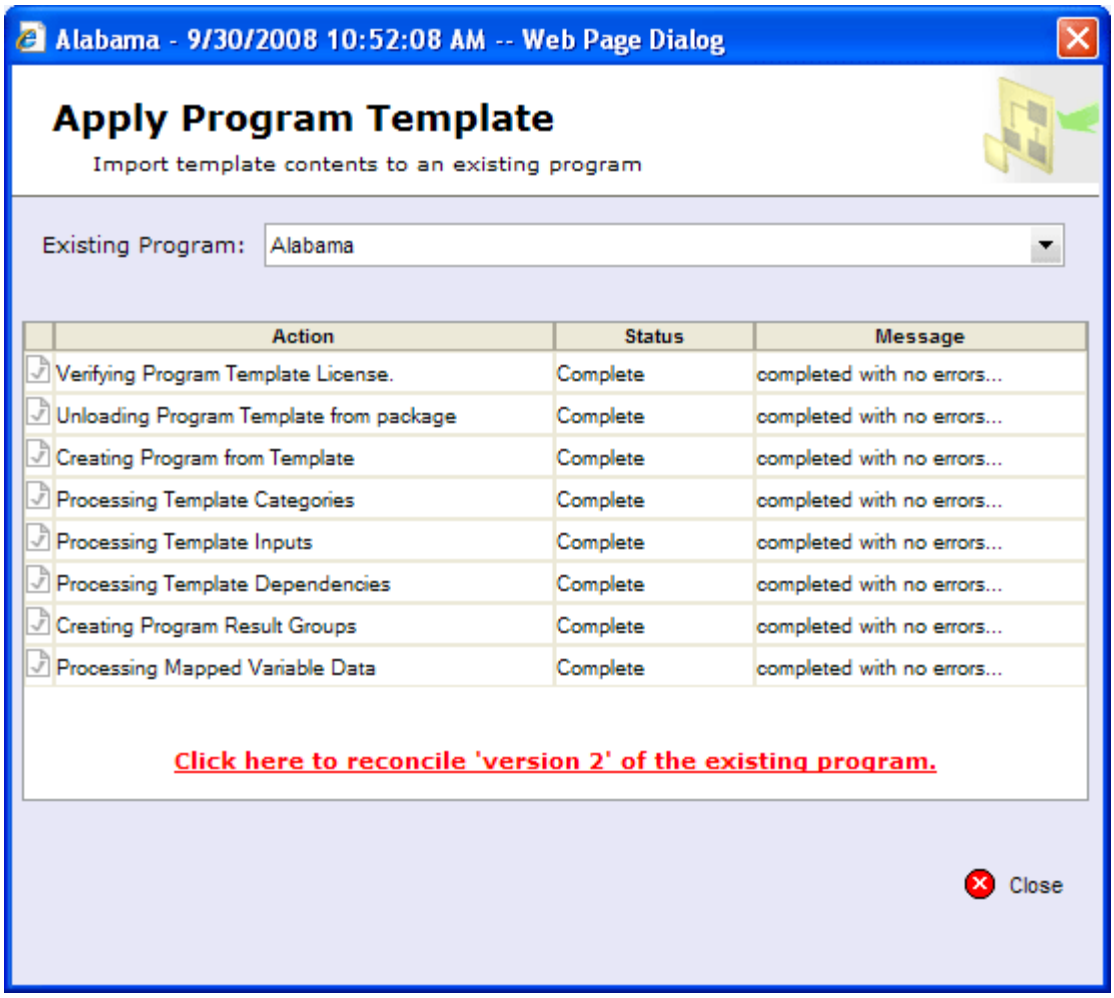


Figure 35 Applied Template Success

If the template is successful, the subline and program folder along with the template will be displayed under the correct line of business.

If the template failed, a failed message will be listed. The Subline and the Program Folder will be created but no template will be listed underneath. If one item fails, the template will not be created. All items must pass.

A link will be at the bottom of the screen that will take you to the Reconciliation page. This will allow you to see the differences between this version and the previously applied version. See Reconcile for more information.

Completed Template

The library screen will not change when the template creation is complete. There will be changes in the left hand side menu, under the line of business you just added the template to.

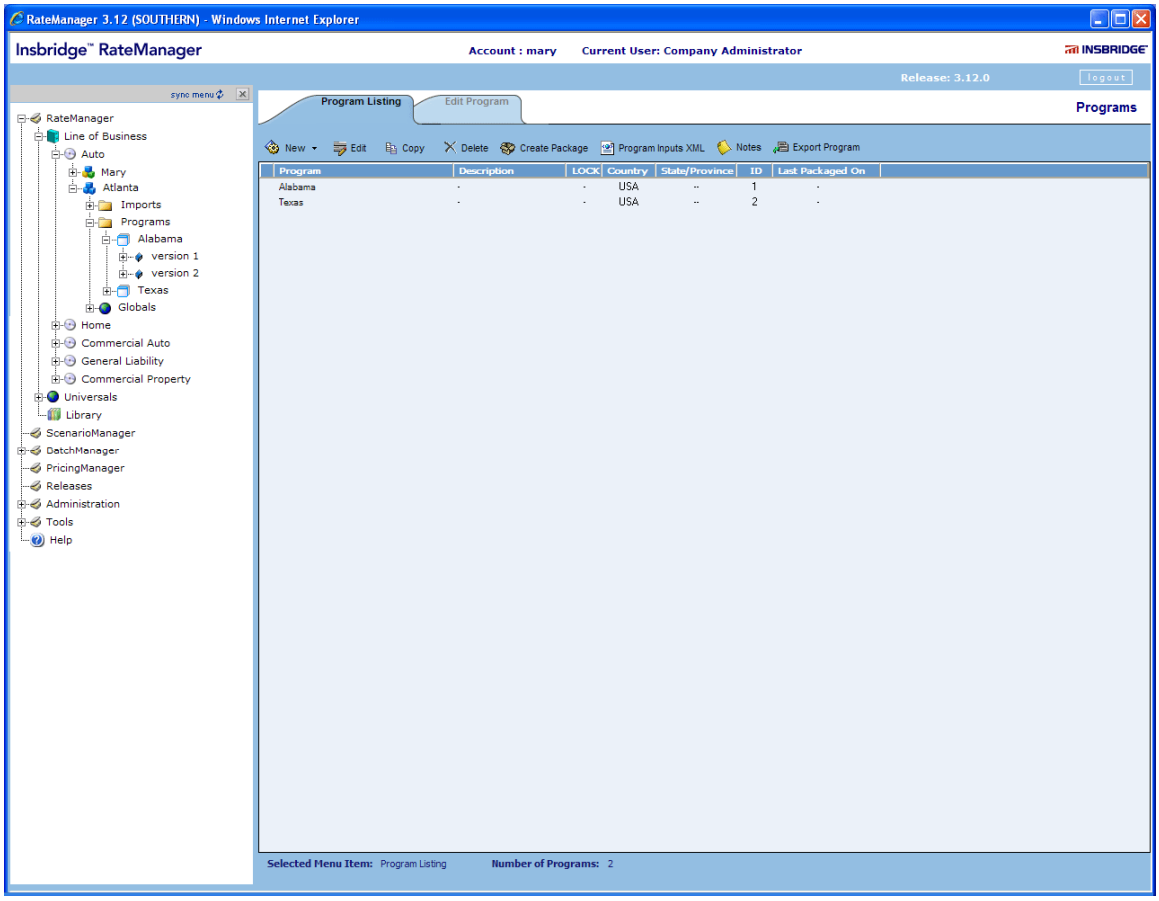


Figure 36 Completed Template

Under the line of business for the template, a new subline will be listed. Under this subline is a program folder, with the templates under that.

There are two types of programs:

Standard Programs – These are programs that you created. Unless locked, you will be able to add, edit or delete any item from this program.

Template Programs – These are programs that were created from a template. Template programs automatically have variables, algorithms and driver assignments locked. These items cannot be edited or deleted. You will be able to add items and create revisions. Any globals associated with a template will be locked as well.

5

Program Management

Programs in RateManager typically correspond to rate manuals. For example, if you had rate manuals for Texas and Florida auto, then you would probably have RateManager programs for Texas and Florida under the auto line of business. When a rate change occurred for one of the states, you would create a new version of the appropriate program.

RateManager supports an unlimited number of programs and all programs are subline specific. For example, creating **Program 1** for **Carrier A** under the Mary subline does not create **Program 1** for **Carrier A** under the Content Services subline.

There are two types of programs:

Standard Programs – These are programs that you created. Unless locked, you will be able to add, edit or delete any item from this program.

Template Programs – These are programs that were created from a template. Template programs automatically have variables, algorithms and driver assignments locked. These items cannot be edited or deleted. You will be able to add items and create revisions. Any globals associated with a template will be locked as well.

Sublines can contain both standard and template type programs, except for the default subline. The default subline will only contain standard programs. You will not be allowed to apply any template programs into your default subline.

Program Listing Screen

The Program Listing screen shows a listing of all programs under a particular line of business, subline and folder. Only programs will be displayed. To view subfolders, expand the folder view on the left hand menu. The Program Listing screen is where you can:

- Create a New Program
- Create a New Program Version
- Edit a Program
- Edit a Program Version
- Copy a Program
- Move a Program
- Delete a Program

  Delete a Program Version

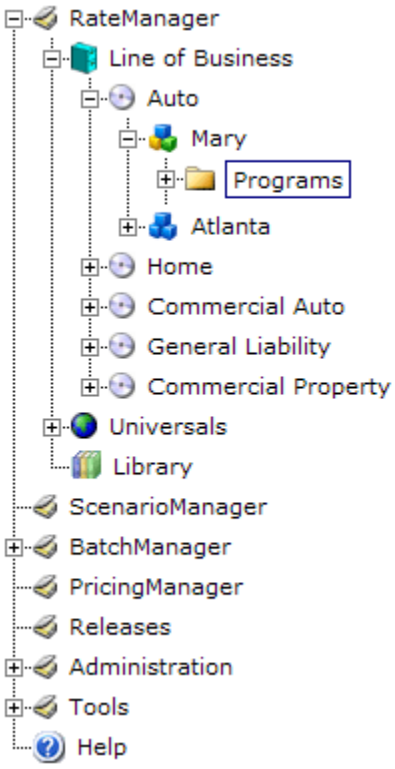
  Create a Package – See Introduction to Packaging

  Locking a Program Version, Template or Element

View Program Inputs XML
Enter A Note
Export a Program
View Program Version Report
View a Program Difference Report

Navigating to the Program Listing Screen

1. From the menu tree, select the line of business, subline, and folder where you want to see the **Program Listing**.



2. This will open the **Program Listing** screen.

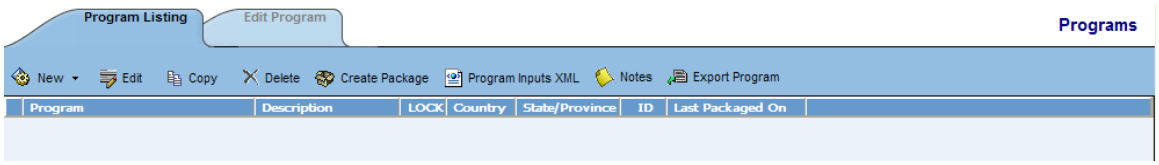


Figure 37 Navigating to Program Listing

Navigation Bar

The **Edit Program** Tab opens the Edit Program screen for the selected program.

New: Begins the process of creating a new program or program version.

Edit: Allows you to edit:

- **Program** – allows you to edit program name, date mask, country, state/province and variables to be used for version selection.
- **Version** – allows you to edit description and program versioning data.

Copy: Creates a copy of the selected program version.

Delete: Deletes the selected program or program version.

Create Package: Packages the selected program version for rating and testing. See Introduction to Packaging for more information.

Program Inputs XML: Shows a listing of inputs used by the selected program version.

NOTE	You also can view, copy or print the Program Inputs XML by right clicking the version on the left hand side of the screen. This will pull up the program inputs XML popup. This feature can be used at any time and does not require you to leave the screen you are currently working in.

Notes: Allows you to enter, edit and view notes to the program version.

Export Program: Allows you to export all elements of a program from one database to another database or within the same database. See Exporting a Program.

Program Listing

The Program Listing screen displays a listing of all programs contained within this folder. If there are no programs, the screen will be blank. Double-click a program to show the versions.

Program: The name of the program.

Description: Description of the program version.

LOCK: Allows an administrator to lock a program to prevent it from being changed or deleted.

Country: The country the program is for.

State/Province: The state or province the program is for.

ID: The XML ID that is used to call the program.

Last Packaged On: The date and time the last local package was created for the version.

Creating a New Program

New programs can be added at any time to any folder. Template created sublines can have standard programs added to them. There is no limit to the number of programs you can enter.

1. Navigate to the **Program Listing** screen for the subline and folder where you want to create a new program.

2. Click once on the New button and select **New Program**. The following popup box will open, allowing you to enter the program name, date mask and select a country and state/province.

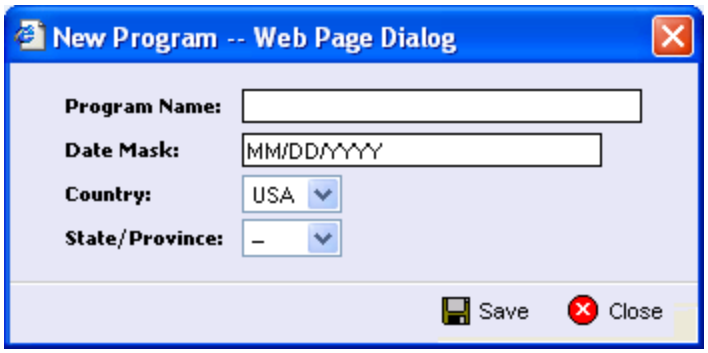


Figure 38 Creating a New Program

3. Selecting Save will refresh your screen with the program information you entered. An XML ID number also will be assigned to the program. If you double-click on the new program name, you will see that **Version 1** has been created for you.

Program Versions

When you create a program, version 1 will be created at the same time. Under a program, all versions will contain the same variables, algorithms, sequencing, mappings and globals. Versions will differ when you select different versions of these elements. For example, under Program A, you have two program versions. In version 2, you have changed a mapped variable to use version 2 of that mapped variable and you changed an algorithm to use version 4 of that algorithm. Only program version 2 will change. The version 1 will continue to use the versions they were using. These same variables and algorithms are in both program versions, but by selecting different versions of these elements, you have changed program version 2. For more on versioning, please see Introduction to Versioning.

Program versions can be created by you under a standard program or under a template generated program. Program versions can also be brought in under a template generated program. Different color icons will help you to visually identify the program versions that were applied from a template from the ones that you created.

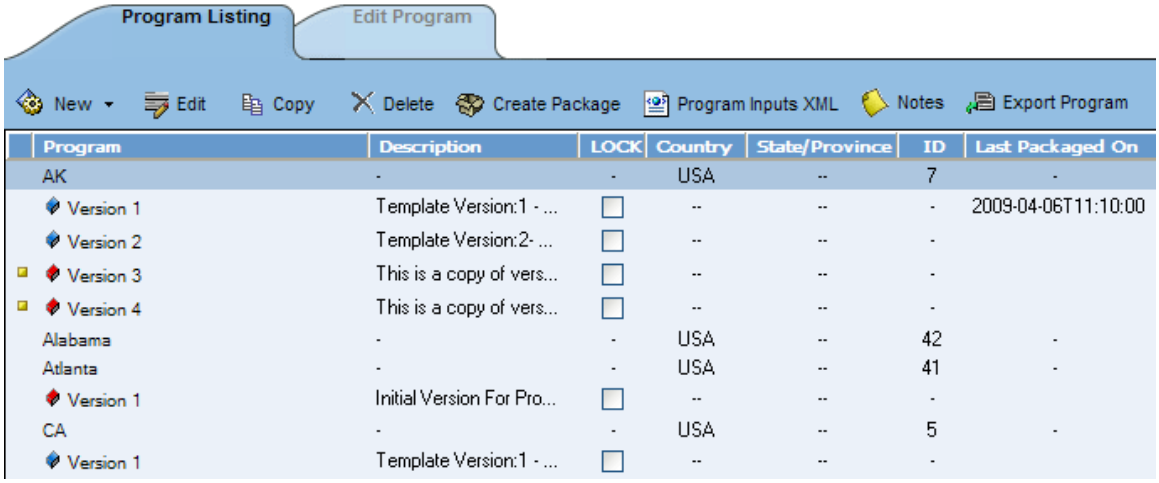
- **User Created** – Designates a program version that was created by you. User created program versions can be created by you or revisioned from a template program version. Most often, user created program versions will be displayed in the default subline, but may be present if you create a new program version in a template generate program.

- **Template Created** – Designates a program version that came from a template. Template created program versions also will be displayed underneath copied template generated programs. Template created program versions will be displayed in template generated sublines.

When you copy a template generated program, version 1 will be displayed with a template created icon. This is to designate that the program and version 1 were created from a template. A copied template generated program can accept additional versions of the program that may be entered in the library. You can create a new program version underneath that will be displayed with a user created icon. You also can apply another template version from the library, which will be displayed with the template created icon.

Copied template program versions will be displayed with a user created icon. This is to designate that the program version was not applied from a template but user created. Even though this program version is user created, template rules will still apply. Template created program versions automatically have variables, algorithms and driver assignments locked. These items cannot be edited or deleted. Any globals associated with a template will be locked as well. You will be able to add items and create additional versions. User created program versions that were built by you will be open for editing, deletion or moving, unless locked.

Template generated sublines can contain both user created and template created program versions. Default sublines can only contain user created program versions.



Program	Description	LOCK	Country	State/Province	ID	Last Packaged On
AK	-	-	USA	--	7	-
Version 1	Template Version:1 - ...	☐	--	--	-	2009-04-06T11:10:00
Version 2	Template Version:2- ...	☐	--	--	-	
Version 3	This is a copy of vers...	☐	--	--	-	
Version 4	This is a copy of vers...	☐	--	--	-	
Alabama	-	-	USA	--	42	-
Atlanta	-	-	USA	--	41	-
Version 1	Initial Version For Pro...	☐	--	--	-	
CA	-	-	USA	--	5	-
Version 1	Template Version:1 - ...	☐	--	--	-	

Figure 39 Program Versions Created by User and Outside

Creating a New Program Version

New program versions can be added at any time. There is no limit to the numbers of program versions you can enter.

1. Navigate to the **Program Listing** screen for the subline and folder that contains the program where you want to create a new version.

2. Double-click the program you want. This will expand the program and show all of the versions. For newly created programs, there will be only one version.

Figure 40 Adding a New Version

3. Select the version you want the new version based on. Either click the New button and select **New Program Version** or right click the version and select **New Version**. The version will be copied as the next available version number and the screen will refresh.

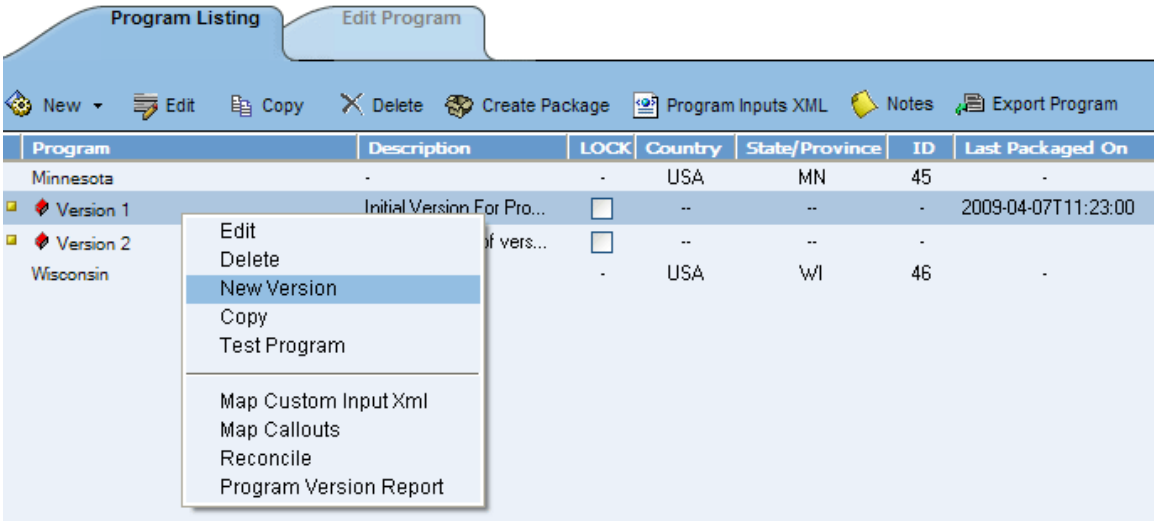


Figure 41 Adding a New Version

NOTE	When a new version of a program is created it is initially a pointer to all elements in the last version of the program. When a change is made to an element in that version, it can be made version specific or applied to multiple versions. See Introduction to Versioning for more information.

Editing a Program

Editing a program is used when you want to change the name, date mask, country or state/province of a program or select which inputs are used for version selection.

1. Navigate to the **Program Listing** screen for the subline and folder that contains the program you want to edit.

2. Select the program you want to edit and either click Edit or right click the program and select **Edit** from the popup menu.

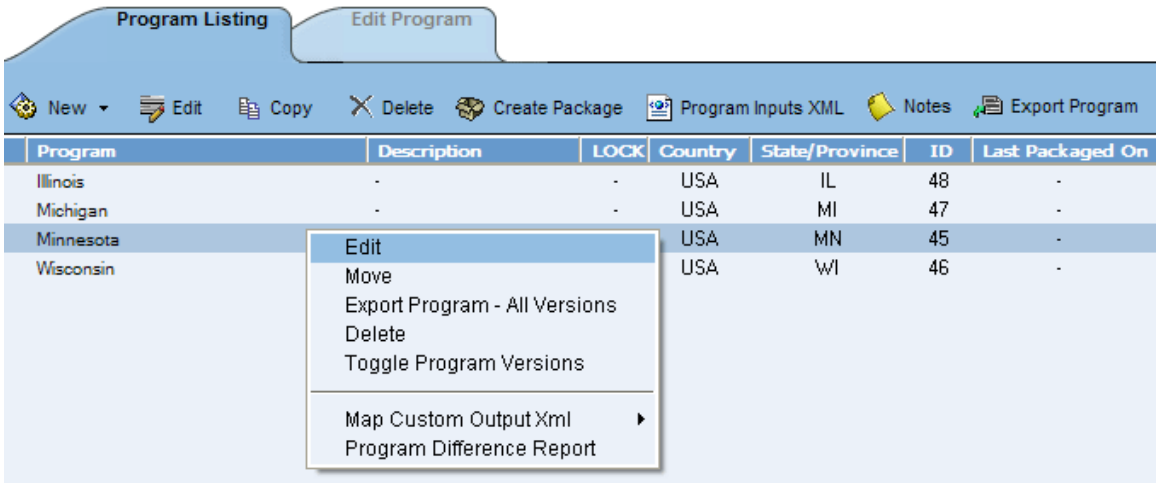


Figure 42 Selecting a Program to Edit

3. This will open the **Edit Program** screen, where you can change the program name, date mask, country, state/province and variables used for version selection.

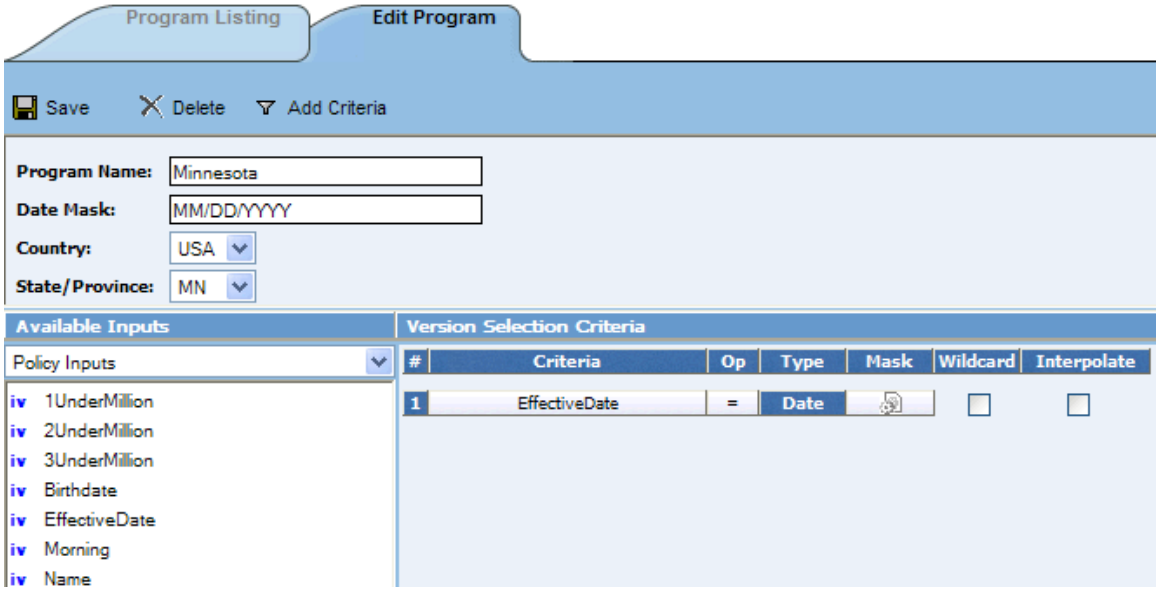


Figure 43 Editing a Program

In the above example, the EffectiveDate of the policy is going to be used to determine which version to use.

- To remove an input as a criteria, click on the name in the **Version Selection Criteria** listing and select Delete from the menu bar or right click the criteria and select **Delete** from the popup menu.
- To add additional criteria, find it in the listing of **Available Inputs** and either select it and click Add Criteria or double-click the input.
- To change the comparison operator used when interpreting data, click the box in the **Op** column (In the above example it is an equals sign, =). See Comparison Operators for more information.
- To set a mask to be used when interpreting string inputs, click the box in the **Mask** column. See Masking for more information.
- To inform the system that exact matches are not required, click the checkbox in the **Wildcard** column. See Wildcard for more information.

NOTE	Only Policy level inputs can be used as Version Selection Criteria.

4. When you have finished making changes, select **Save** to save your changes and click the **Program Listing** tab to return to the list of programs.

Editing a Program Version

Editing a program version is used when you want to change the description of a version, add notes to a version or enter data used for version selection.

To Edit a Program Version

1. Navigate to the **Program Listing** for the subline and folder that contains the program whose version you want to edit.
2. Double-click the program that contains the version you want to edit. This will expand the program and show all the versions. You can also right click the program and select **Toggle Program Versions** to display all the versions for that program.

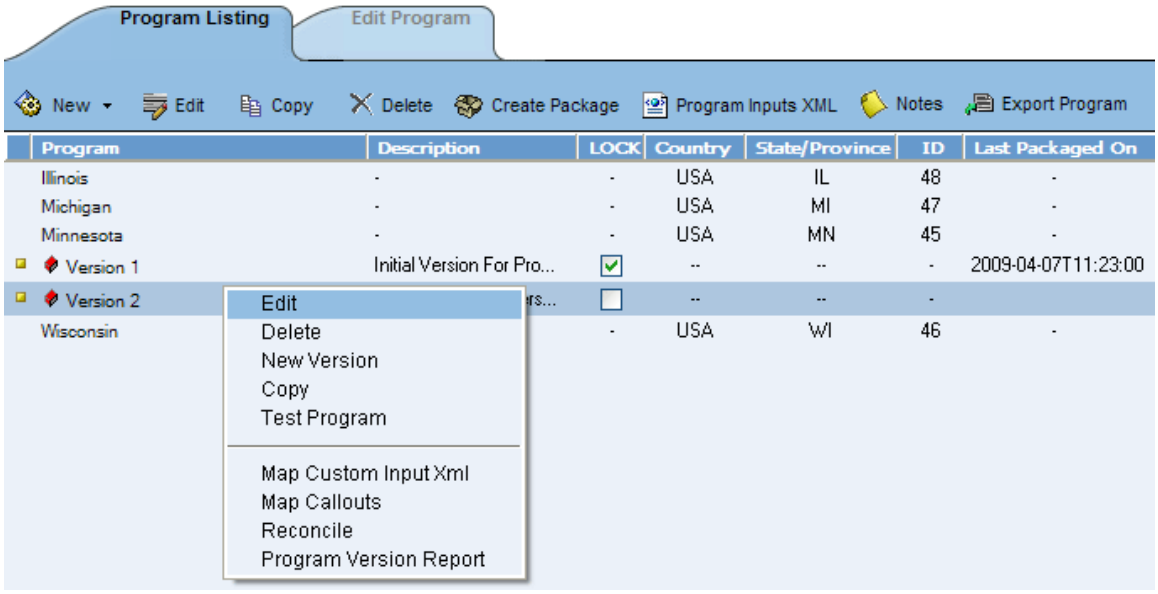


Figure 44 Selecting the Program Version to Edit

3. Select the version you want to edit and either click Edit or right click and select **Edit** or double-click the version. This will open the **Edit Program Version** box.

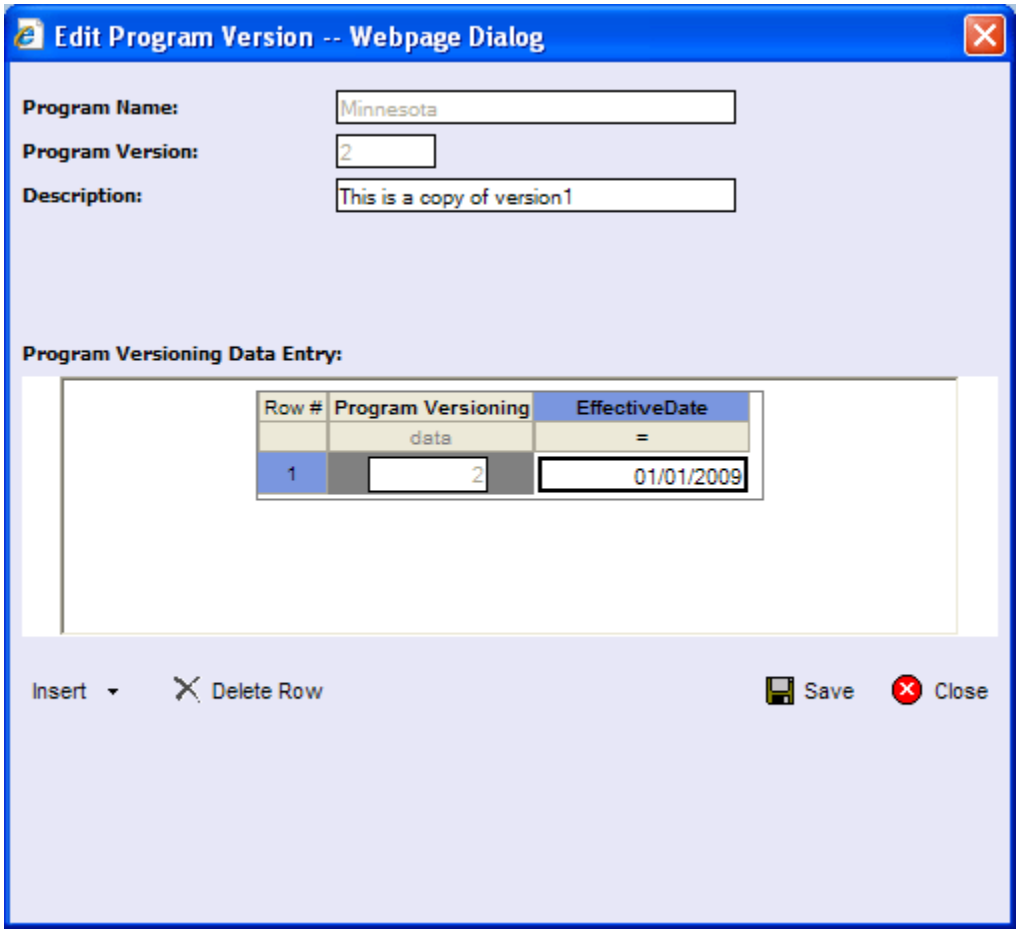


Figure 45 Editing a Program Version

Program Name: The name of the program the version is for. This can only be edited from the Edit Program screen.

Program Version: Version number of the current version. RateManager automatically assigns this when a new version is created and cannot be edited.

Description: Provides a place for you to enter a description for the current version.

Data Table: Shows the data that will be used during version selection.

Insert: Inserts a new row into the table, either above or below the currently selected row. If no row is selected, the new row will be added to the end of the table.

Delete Row: Deletes the currently selected row.

Save: Saves changes made to the description or notes and then closes the box. Changes made in the table are saved immediately.

Close: Closes the box without saving changes to the description or notes.

4. For the data table, enter the valid values that can be used to call the version of the program that you are editing. For example, the above data table is for Version 2 of the program ***Minnesota***. In this data table, you would only enter information for selecting Version 2 of the program. If you wanted to enter information for selecting Version 1 of the program, then you would edit program Version 1. The Program Versioning column in the data table will always be the number of the current version that is being edited. For example, if there were ten rows in the above table, the Program Versioning column would always be 2 because that is the version the table is for.

Copying a Program

To copy a program, you must select the program version you want to copy. You can copy a program to any folder under the subline where the program is located.

To Copy a Program

1. Navigate to the **Program Listing** screen for the subline and folder that contains the program you want to copy.

2. Double-click the program you want to copy. This will expand the program and show all of the versions.

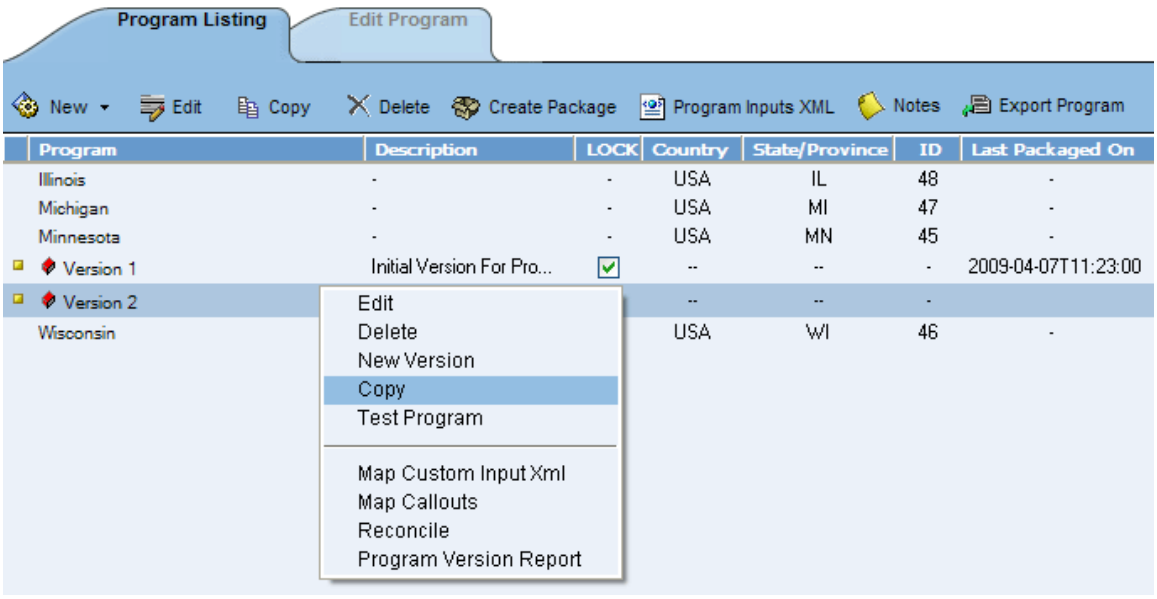


Figure 46 Selecting a Program to Copy

3. Select the version you want to copy.
4. Either click the Copy button in the menu bar or right click the version and select **Copy**.
5. The following popup box will open, allowing you to enter the new program name and select the folder you want the new program copied to. You are also given a choice to either copy only the definitions or the definitions and all data.

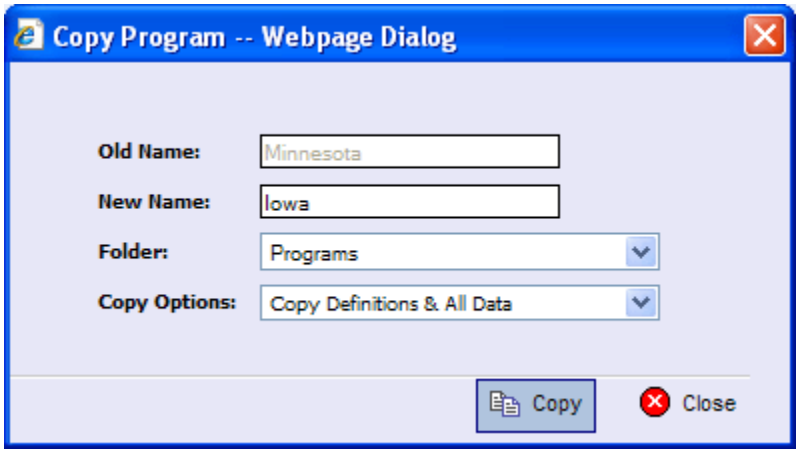


Figure 47 Copying a Program

Copy Definitions Only: This option will copy all elements of the program with the exception of the data contained in mapped variables. This is a good option to choose if you are loading a new program that uses the same or similar logic as an existing program, but different data values.

Copy Definitions & All Data: This option will copy all elements of the program, including the data contained in mapped variables. This is a good option to choose if you are making a backup of a program or you want to see how a logic change affects your book of business.

6. Selecting Copy will refresh your screen with the program information you entered.

NOTE	When you copy a program, the version description is copied also. Be sure to make any changes to the version description to ensure the correct program information is displayed on generated reports.

Moving a Program

You can move a program to any folder under the same subline where the program is located. Moving will allow you to move the program and all versions.

To Move a Program

1. Navigate to the **Program Listing** screen for the subline and folder where you want to move a program.

2. Highlight the program you want to move. Right click for the menu.

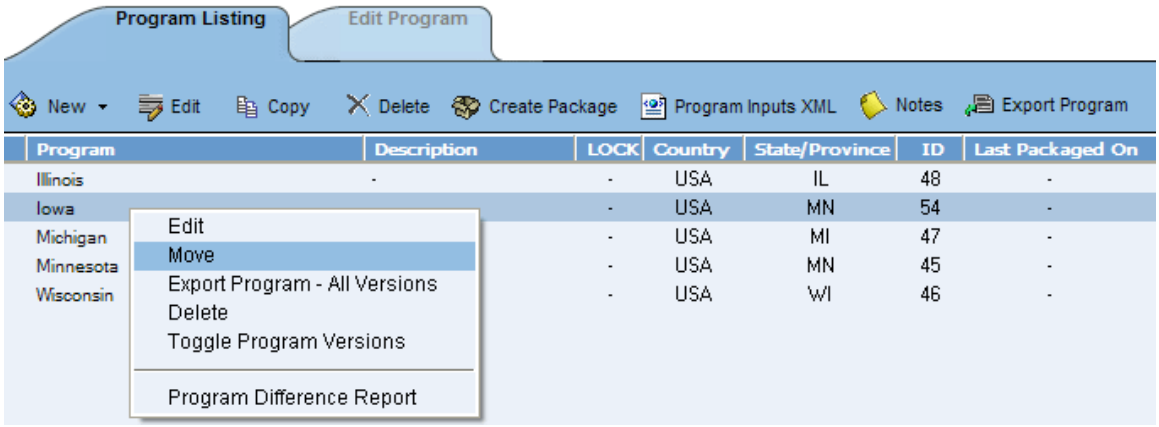


Figure 48 Moving a Program

3. Select **Move**. A **Move Program** screen will be displayed.

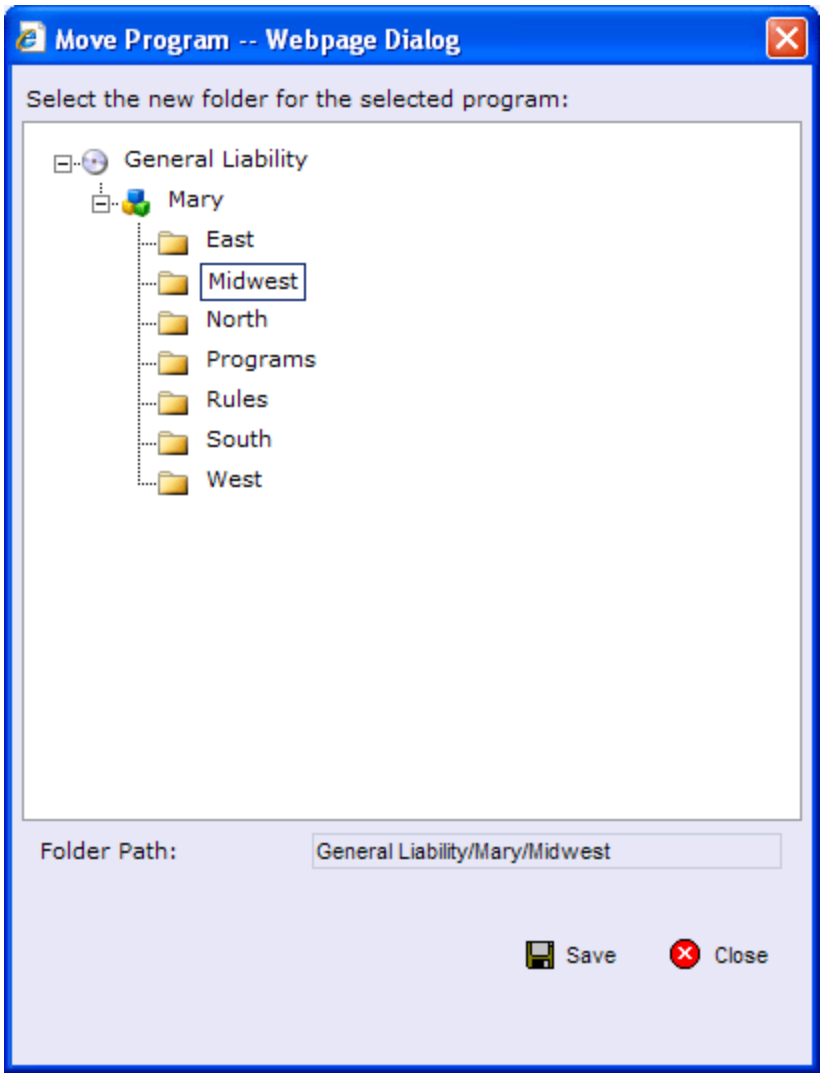


Figure 49 Selecting Destination for Moving a Program

4. The Folder Path at the bottom of the popup will display the current location of the program. Click the folder where you want to move the program to. The Folder Path will reflect the final destination for the folder.

5. When you have the program in the correct folder, click Save. The screen will refresh and the program will be moved.

Deleting a Program

If a program is no longer needed it can be deleted. Make absolutely sure a program is no longer needed before deleting it. When a program is deleted, all data (variables, algorithms, sequencing, result groups and, if an auto program, driver assignment scenarios) and versions are deleted.

NOTE	Program deletion cannot be undone.

To Delete a Program

1. Navigate to the **Program Listing** screen for the subline and folder where the program you want to delete is located.

2. Select the program you want to delete and either click Delete or right click it and select **Delete** from the popup menu.

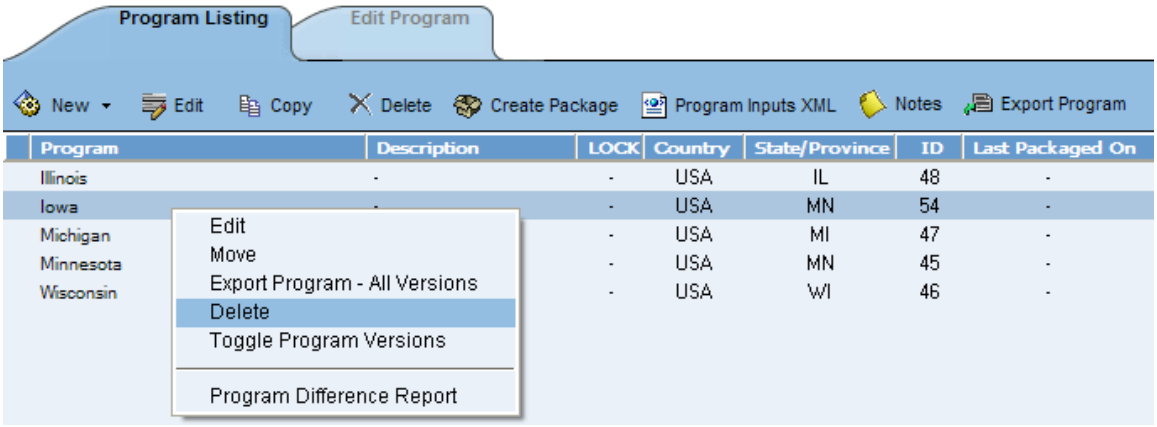


Figure 50 Selecting a Program to Delete

3. You will be asked to confirm deletion of the program.

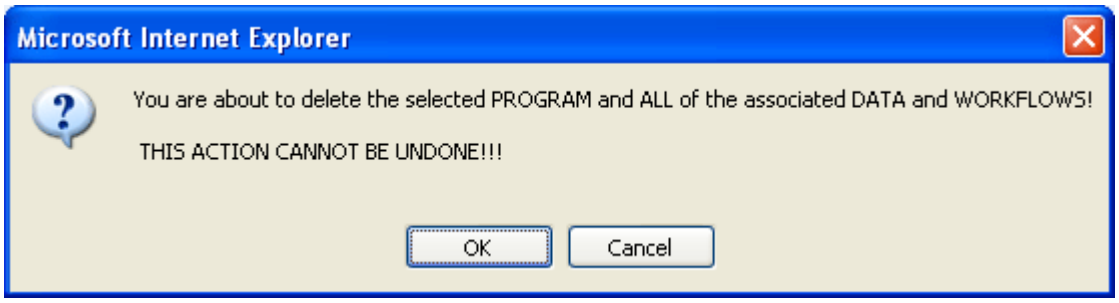


Figure 51 Delete Warning Message

4. Select **OK** to confirm deletion or Cancel to return to the program listing without deleting the program.

5. You will be asked again to confirm deletion of the program.

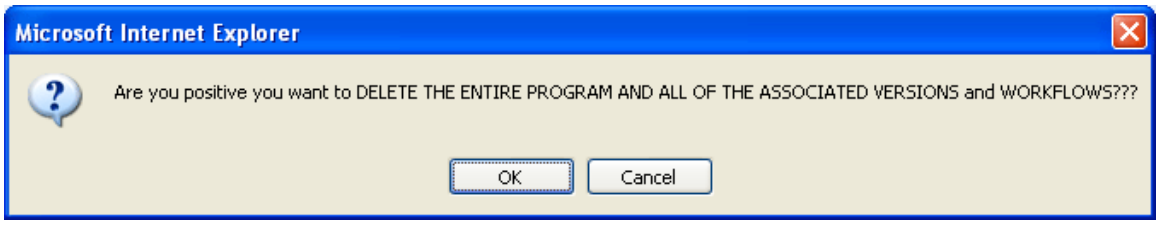


Figure 52 Confirming Delete

6. Again, select **OK** to confirm deletion. The program and all associated versions will be deleted. Click Cancel to return to the program listing without deleting the program.

Deleting a Program Version

If a program version is no longer needed, it can be deleted. Unless you delete the last version of a program, deleting a version does not delete algorithms, variables or driver assignment scenarios, but it does delete the sequence and any result groups. Deleting the last version of a program is the same as deleting a program.

To Delete a Program Version

1. Navigate to the **Program Listing** screen for the subline and folder where the program version you want to delete is located.

2. Double-click the program that contains the version you want to delete. This will expand the program and show all the versions.

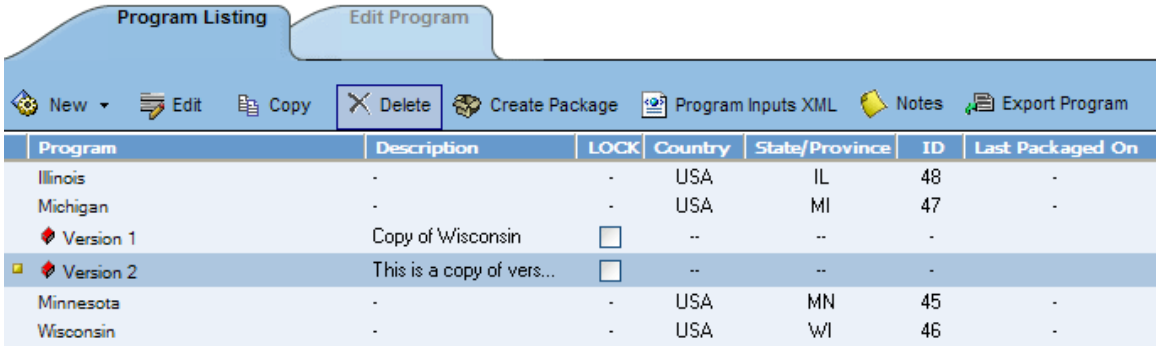


Figure 53 Selecting a Program Version to Delete

3. Select the version you want to delete and either click Delete or right click it and select **Delete** from the popup menu.

NOTE	Program Version deletion cannot be undone.

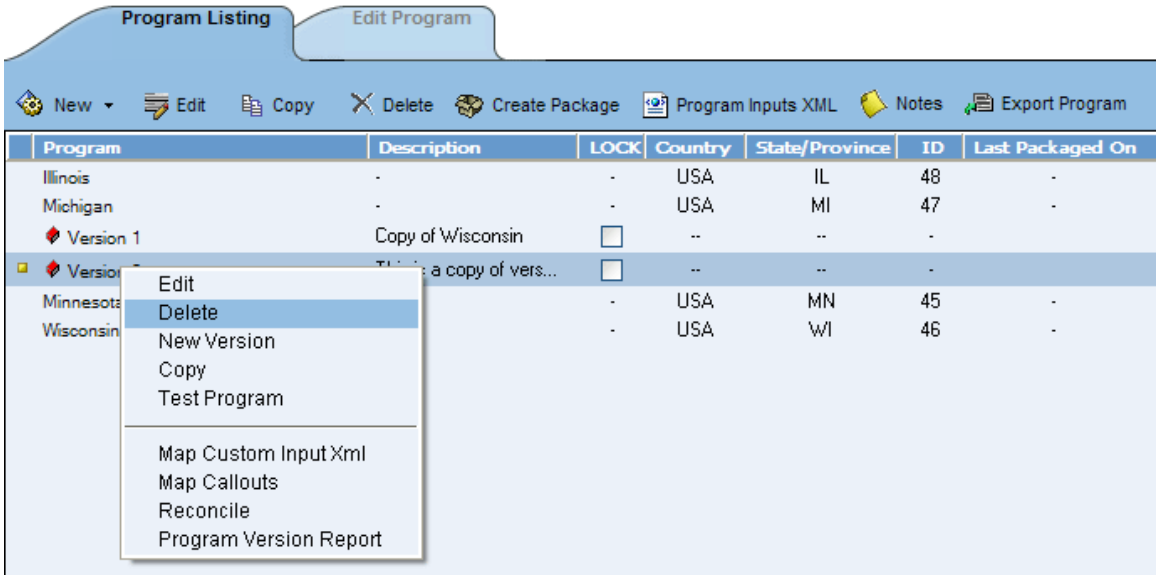


Figure 54 Deleting a Version

4. You will be asked to confirm deletion of the version.

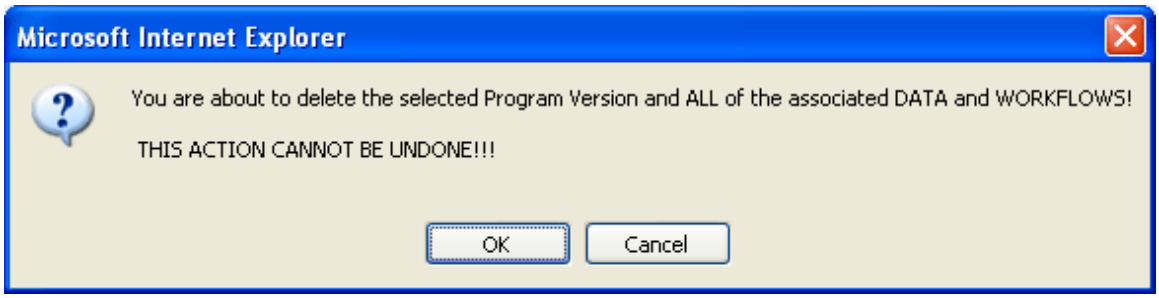


Figure 55 Delete Warning Message

5. Select **OK** to confirm deletion or Cancel without deleting the version.

6. You will be asked again to confirm deletion of the program version. If you are deleting the last version, you will be asked to confirm deletion of the program.

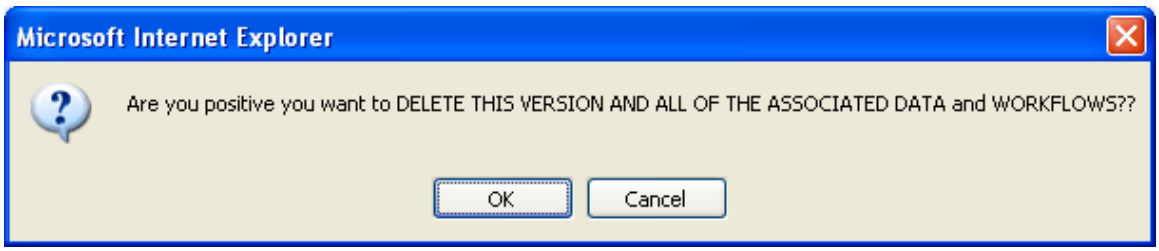


Figure 56 Confirming Delete

7. Again, select **OK** to confirm deletion. The version will be deleted. Click Cancel to return to the program listing without deleting the version.

Locking

Locking can help to protect the integrity of your work and prevent other users from editing elements that you are currently working on. Locking also keeps templates from being altered. This will ensure that the original form of the template remains intact.

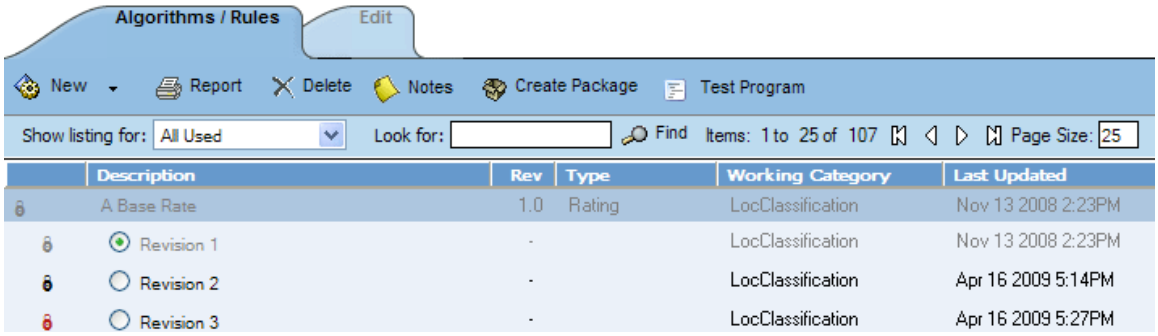


Figure 57 Locking

There are three types of locks in RateManager:

- Indicates an **element lock**. The element is locked because another user is currently editing this element.
- Indicates a **program version lock**. The program version is locked and all elements contained within this program version are locked.
- Indicates a **template version lock**. This program version was created from a template. All elements contained within this template version are locked by default.

Different locks have different properties. A program version lock will close the program version and all associated elements to any changes, additions or deletions. New program revisions can be created, copied, and exported regardless of locking.

A template lock will not allow changes to the element versions that are being used, but new elements and new element versions can be created, changed and deleted.

Only one type of lock icon will be displayed even though more than one kind of lock may be used. A template program can be locked at the program version level. This combination will use the gray template lock icon with the Version Locked watermark.

Notes can be added to any locked element or locked program version at any time.

Element Locks

Element locks are temporary locks put on an element to indicate that another user is currently editing this element. Element locks will lock out other users while you are editing the element. This prevents other users from making changes that you may not be aware of or that do not need to be made.

An element will be locked automatically when you enter the edit screen. The element will be unlocked when you exit the edit screen, not when you save.

An element will display the lock icon of the active revision. For example, if you have a variable with two revisions and revision 2 is the active revision. When you edit the active revision – revision 2, the red element lock icon will be displayed by the variable name and the revision you are editing. If you edit the non-active revision, a lock icon will be displayed next to the revision you are editing and not next to the variable name.

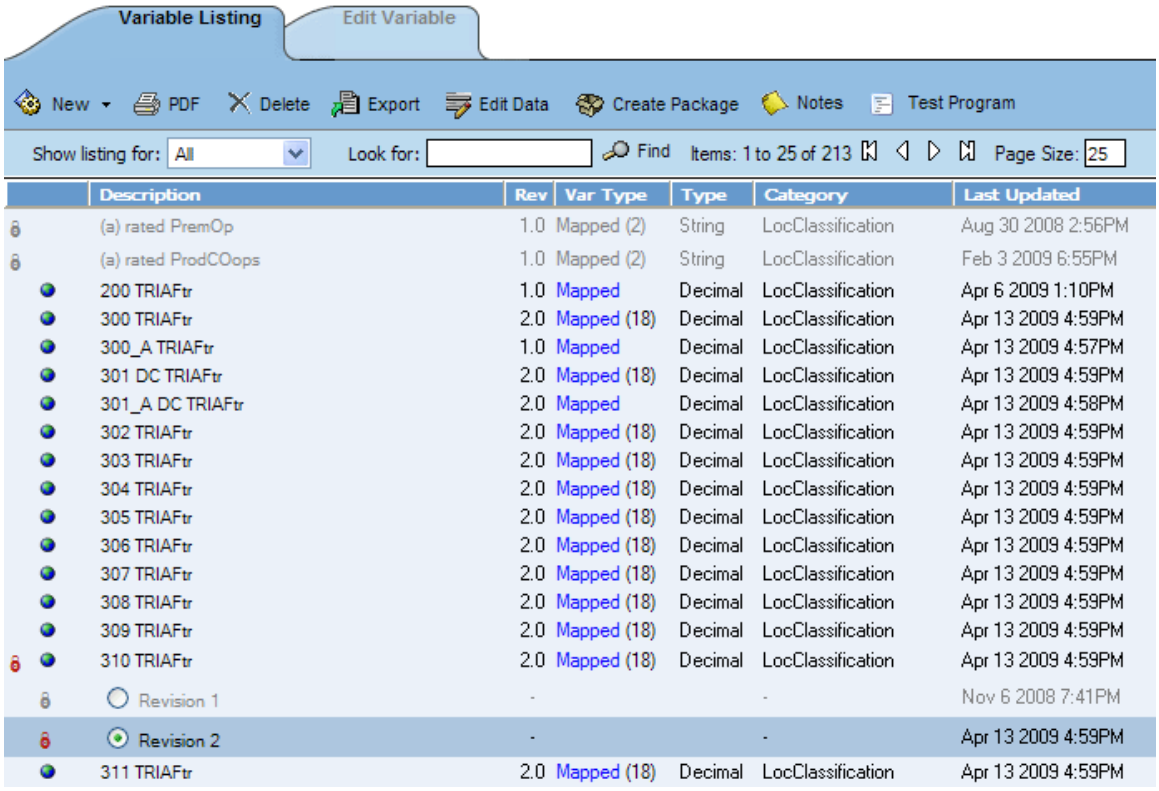


Figure 58 Element Locking of Active Revision

Single elements such as categories, input variables, result variables, program sequencing, and result mapping will be closed to editing when a lock is in place. Revisioned elements, such as mapped variables, calculated variables and algorithms will have the selected revision closed to editing when a lock is in place. This means that if revision 1 is locked, revision 2 may be open for editing. If only one revision exists, the element is locked from any further editing, deletion or copying.

Any open element can have an element lock placed on it when a user goes to edit it. Elements that are locked by a program lock or a template lock will not be open for editing.

Releasing a Locked Element

Hover your cursor over the element lock icon to identify the user who is editing this element and how long they have been editing it.

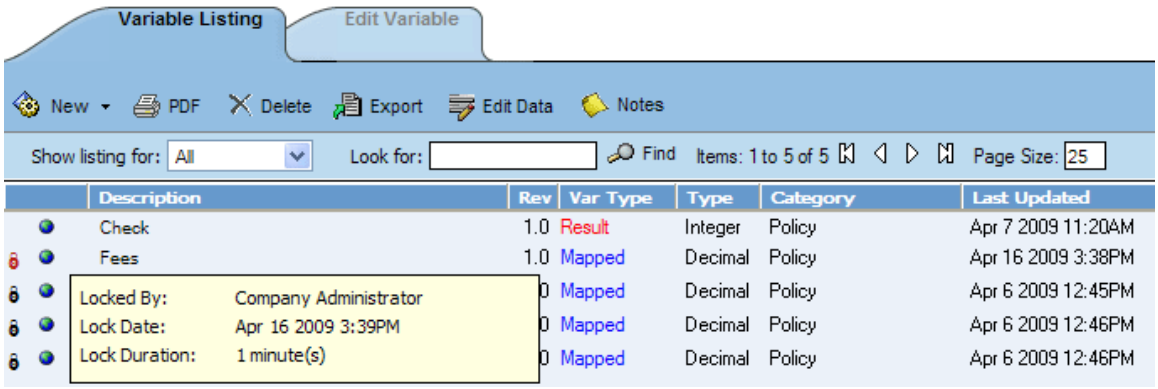


Figure 59 Displaying Element Lock Details

If you attempt to open a locked element, a message will be displayed. The message will let you know who is editing the element and how long the element has been locked.

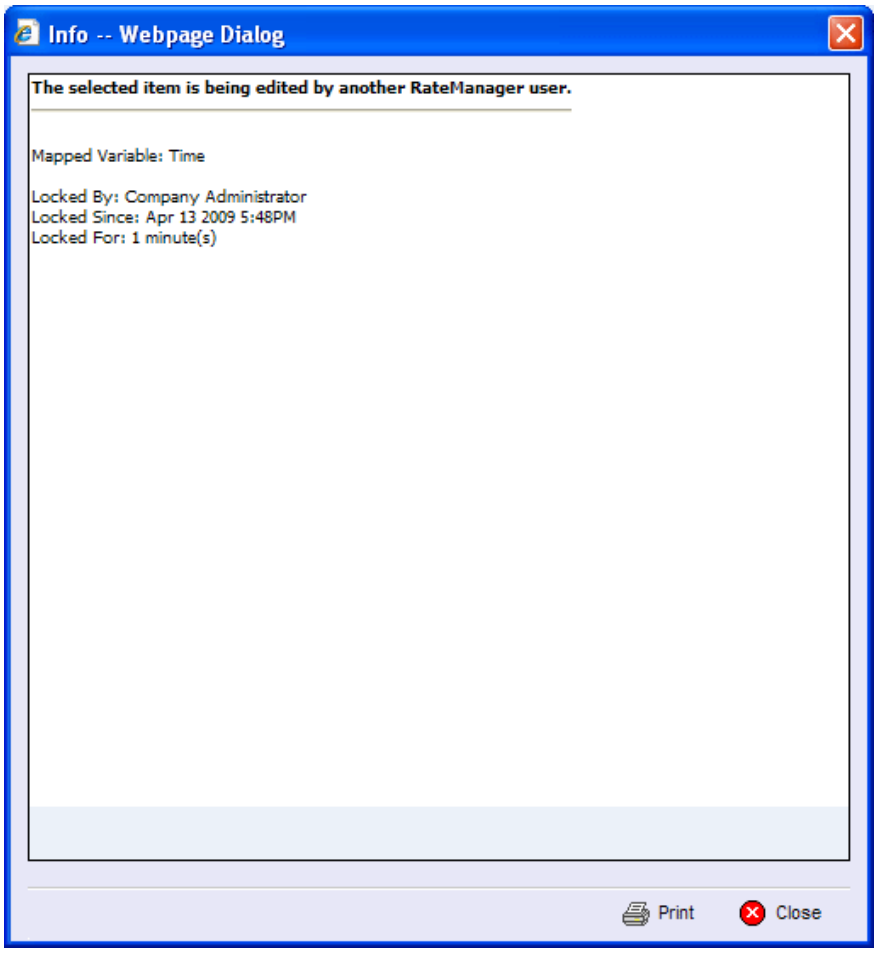


Figure 60 Locked Program Message

If an element has been locked for an extended period of time, please contact your system administrator. The system administrator can release the element from the user who is editing by ending their session.

Program Version Locks

An administrator can lock a program version to prevent it from being changed or deleted. This will lock all the selected versions of the Variables, Algorithms, and Driver Assignments elements plus the Sequencing and Result Mappings used in this program version. The element versions will be locked throughout the subline based on the last packaged date. Changes to these element versions in this subline will not be allowed, regardless of what folder or program version you are working in. Locking a version will not affect other sublines.

For example, you have an auto program with three versions. Program version 1 uses version 1 variables, algorithms and driver assignments. Program version 2 uses version 2 variables, algorithms and driver assignments. Program version 3 uses version 3 variables, algorithms and driver assignments. If you lock program version 2, all version 2 variables, algorithms and driver assignments will be locked in all three program versions. You will not be able to edit or delete any of these element versions in any program in the subline. Elements in program versions outside of the version that has the lock applied will be open for copying. Elements that are locked in version 2 will not be open for copying. The same elements in version 3 will be open for copying.

There will be a program lock icon , indicating which items are locked at the program version level. Locking a program version will also lock the associated Global Categories, Inputs, Variables, Algorithms, and Driver Assignments throughout the subline.

When you go into the program version that you locked, a **VERSION LOCKED** watermark will be on the screen. Other versions in that subline will not have the watermark but will have the lock icons indicating the locked items.

Locking a Program Version

1. Navigate to the **Program Listing** screen for the subline and folder that contains the program version you want to lock.

2. Double click the program you want. This will expand the program and show all of the versions. Place a check in the **LOCK** checkbox for the version you want to lock.

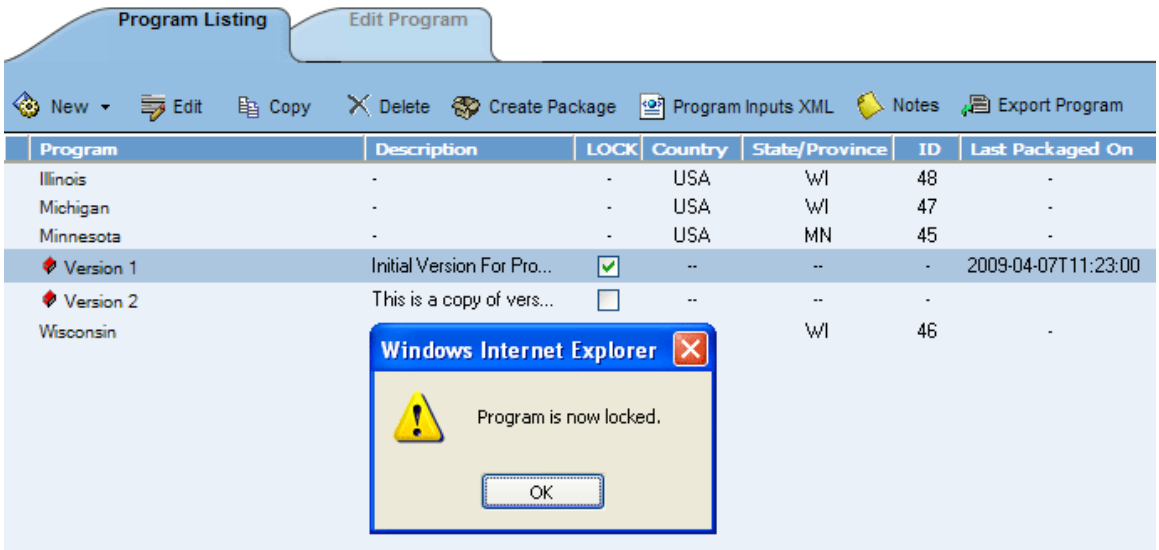


Figure 61 Locking a Version

3. A message will be displayed. Click **OK**. This version is now locked.

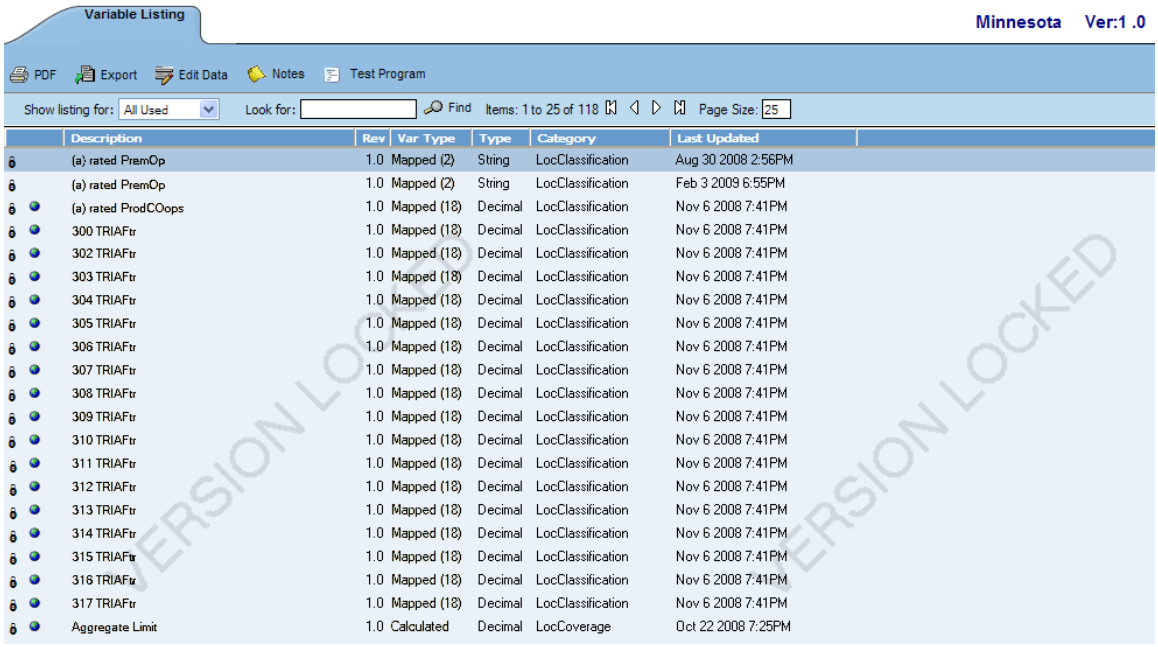


Figure 62 Locked Version

You will not be able to make any changes to the version or to any associated items while it is locked. If you try to edit, a message will be displayed telling you the item is locked.

Only program versions that have been packaged can be locked. If you have made changes to the program or if you packaged the program a while ago, you should package before locking.

Your screen and right click menu options will change when a program lock is put in place.

- The New, Delete, and Create Package buttons along with the Copy, Show/Hide Revisions and Delete options will be removed from the right click menu of the program elements.
- Result groups will have the New Group and Copy Group buttons removed. Edit Groups will have the Save option removed.
- Program Sequencing will have the Save Sequencing and Change Sequence Order removed.
- Notes can still be added to a locked program version.

Unlocking a Version

To unlock a version, navigate to the program listing for the subline and folder that contains the program version you want to unlock. Uncheck the **LOCK** checkbox. A message will be displayed that the version is unlocked. This will free up all items for editing and deletion.

- You must unlock a program before you can package it or reconcile.

Template Locks

Template locks are automatically applied to any template brought into RateManager from either the Library or by import. A template lock will lock all elements of the program from any changes. A template lock does not prevent the program from being packaged or reconciled. A template lock cannot be removed.

Single elements such as categories, input variables, result variables, program sequencing, and result mapping will be closed to editing or deletion by a template lock. Revisioned elements, such as mapped variables, calculated variables and algorithms will have the selected revision closed to editing or deletion by a template lock. There will be a template lock icon, indicating which revisions are locked. If the active revision is locked by a template lock, the element name will have a template lock icon also.

Even if the active revision changes, the template locked revision cannot be edited or deleted. You will be able to add new elements. The new elements will not have a template lock. You will be able to edit or delete as needed.

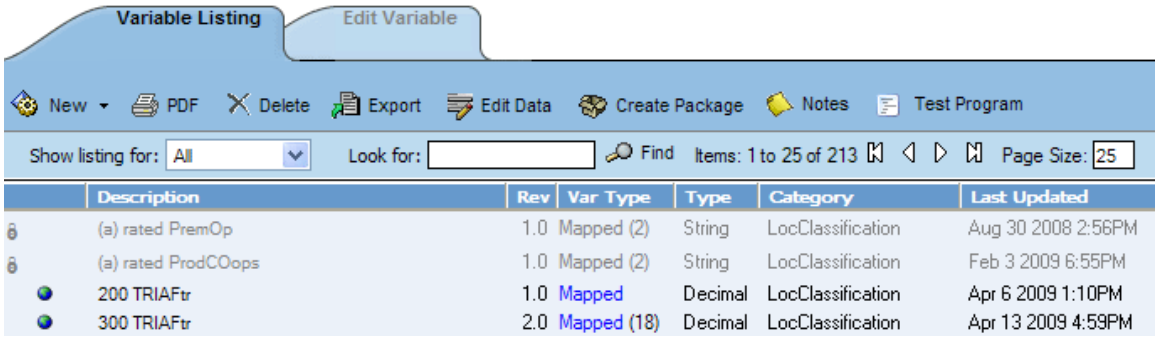


Figure 63 Program Elements Locked by Template

Notes can be added to a template locked element at any time.

To prevent any additions to a template program, you can lock the program. The Version Locked watermark will be displayed on any template program that is locked.

Program Inputs XML

Clicking the **Program Inputs XML** button will bring up a popup that shows a listing of inputs used by the selected program version.

Viewing Program Inputs XML

1. Navigate to the **Program Listing** screen under the subline and folder that contains the program version where you want to view program inputs XML.

2. Double-click the program that contains the version you want. This will expand the program to show all the versions.

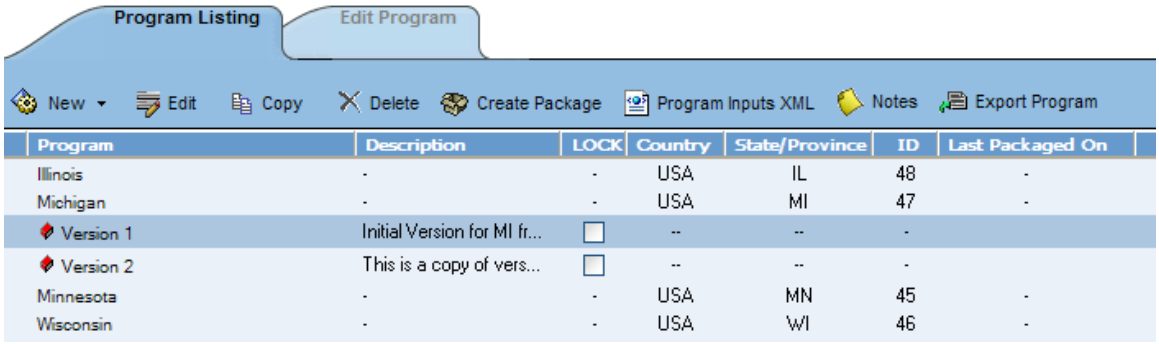


Figure 64 Program Inputs XML Select

3. Select the version you want. Click the Program Inputs XML button in the menu bar.

4. A popup box will open that allows you to view, copy or print the XML for this version.

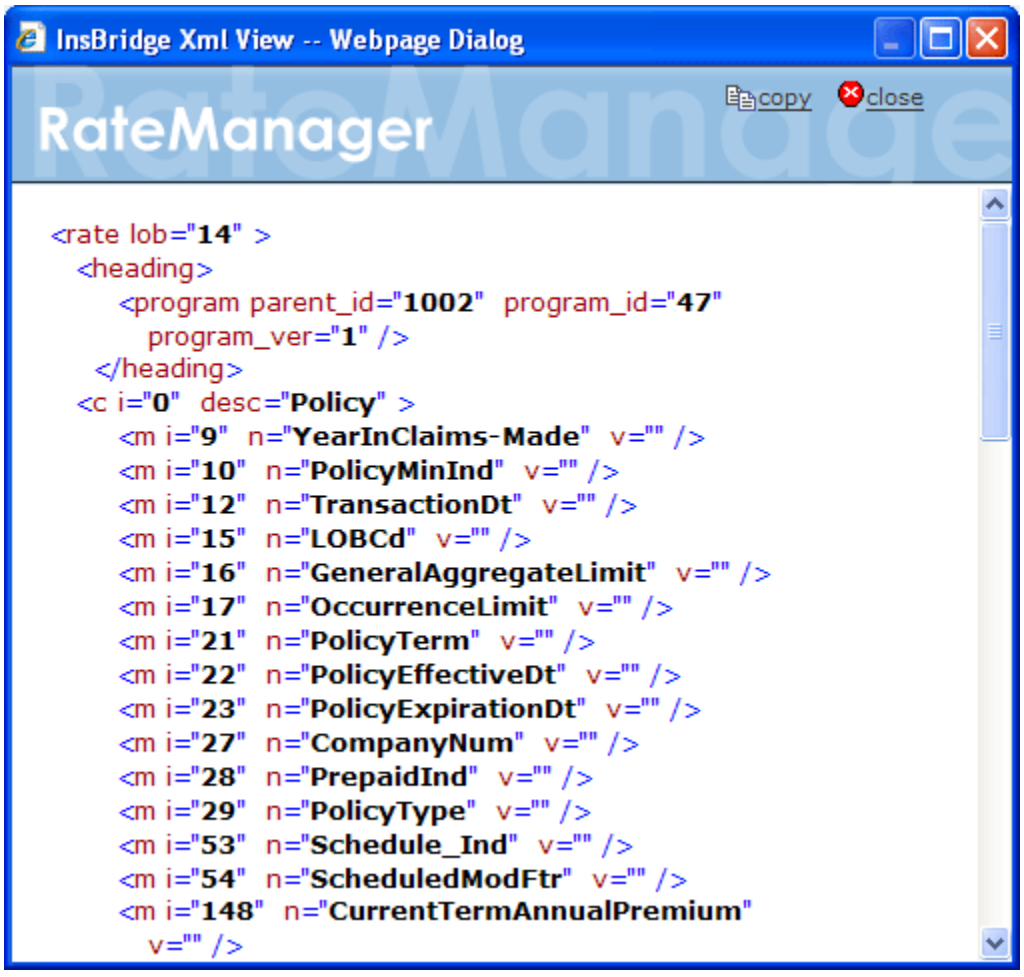


Figure 65 Program Inputs XML

5. Click **close** to close the popup when you are finished

Notes

Notes allow for explanations or comments to be added to an element or a program version. These are optional entries that can be added to program versions, variable revisions, algorithm revisions, sequencing, result mapping, categories, and inputs. Notes can be added from many screens throughout RateManager.

From the main notes screen, you can add, edit, or delete a note. You can enter as many notes as you need at any time you want. On the active elements of a program locked version, notes can be added, edited or deleted.

When an element or program version has a note, the notes icon ▪ will be displayed in front of the program version or element. The notes icon will not be placed at the program level, only at the version level. The notes icon will be displayed at the element level, but only if the active revision has a note. If only a non-active revision of an element contains a note, the notes icon will not be displayed at the element level.

To view the note, highlight the element and click the Notes button. Your note will be displayed in a separate screen.

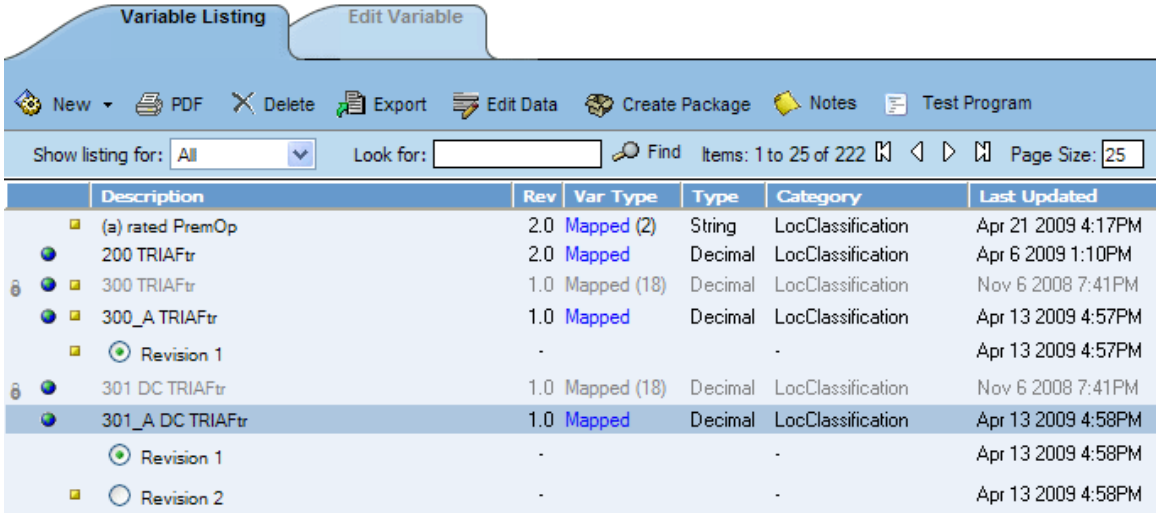


Figure 66 Notes Icons on a Variable Listing

- Notes placed on global elements and linked variables will be carried through to all instances of the element revision or linked variable revision. This means that if you enter a note on revision 1 of a variable that is linked to 10 others, the note will be displayed on revision 1 of each of the linked variables. Likewise a note entered on a global variable will be displayed on that variable throughout the subline.

- Program versions must be selected for a note. You will not be able to enter a note at the program level. You must select the version where you want the note placed.

- Elements do not have to have a specific version selected. Elements will default to the active revision. If you select a variable, but not a specific version, the note will be placed on the active revision. If you want to place a note on a specific revision, you must select the revision and add the note there.

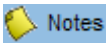
- Notes entered on revision one of an element will not be displayed on revision 3 of the same element. If the same information needs to be on all revisions, you will have to enter a note on all revisions.

NOTE	Notes are not carried through to packages, copies or new revisions.

Adding Notes

Notes can be added at any time. A note can contain up to 200 characters including spaces. Alpha/numeric characters as well as periods (.) and underscores (_) are allowed. No other punctuation or special characters are allowed.

When you enter your note, you will be able to type a note in directly or you can paste a note in from an outside source. Be aware that you may type or paste in more than 200 characters, but the note will only save the first two hundred. Any extra characters will be cut off. You cannot save a blank note.

1. Click the Notes button. 

The main notes screen will be displayed.

Figure 67 Adding a Note to the Main Notes Screen

2. The *Main Notes Screen* holds all the notes and change controls entries that have been made on this element or program version. Notes are listed in date order of newest to oldest with the newest note first. If no notes have been entered, the screen will have the option to enter a new note. You can click the hyperlinked here or click the new button. The notes details screen will be displayed.

3. The *Notes Detail Screen* contains the details of the note and/or any attachments. Enter your **Note** and/or attachment.

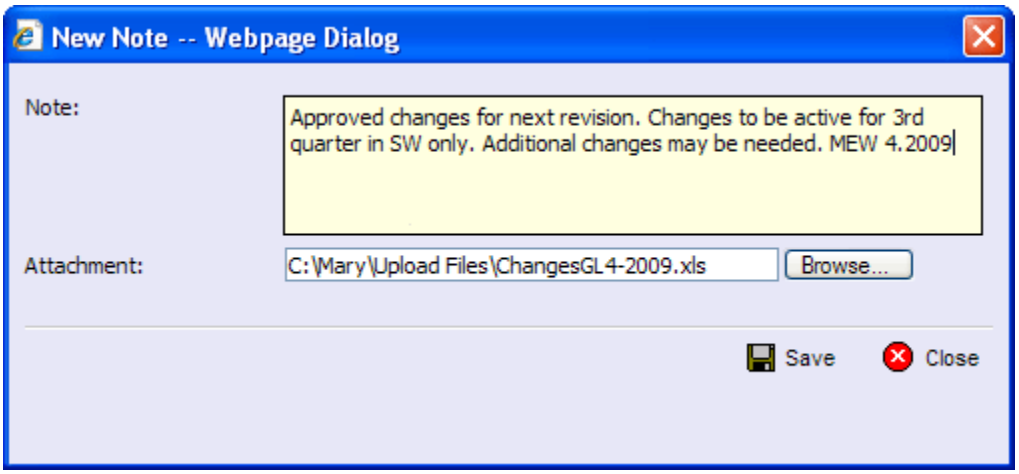


Figure 68 Completing the Notes Detail Screen

4. Click **Save**. The notes detail screen will close and you will be returned to the main notes screen. Your note will be listed.

NOTE	You must click Save if you want to save the note. Clicking close on both the Main Notes screen and the Notes Detail screen will close the screen without saving the note.

5. Enter any additional notes, if needed.

6. When you are finished, click **Close** to close the screen.

Keyboard Shortcuts

You cannot use your mouse right click features to cut and paste however, you can use your keyboard controls. Highlight the text you wish to cut or copy. Use the Control Key plus the letter key to either ”C” copy or “X” cut. Position your cursor where you want your text to be placed. Use the Control Key plus the letter key “V” to paste.

- **Control + X** will cut text.
- **Control + C** will copy text.
- **Control + V** will paste text.

Attaching Files

You can place attachments on a note. Attachments can be MS Word documents, MS Excel spread sheets or Adobe Acrobat PDF files. Other files types will result in an error message being displayed. File names are limited to 25 characters. If your file name has more than that, any extra characters will be cut off.

NOTE	You can attach one file per note. If you need to attach more than one document, you will need to create a new note for each document you need to attach.

1. To attach a file, on the notes detail screen, click the **Browse…** button, this will pull up your computers dialogue box.

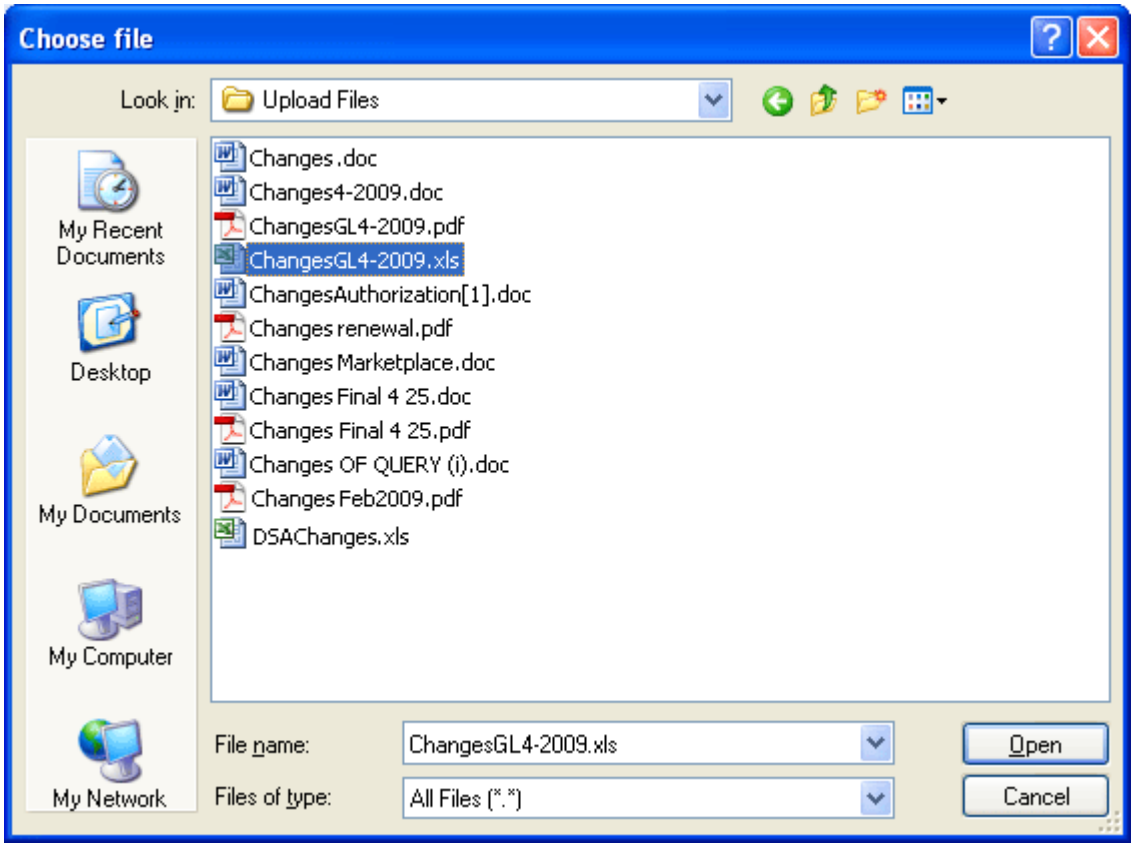


Figure 69 Dialogue Box

2. Find your file and click **Open**. This will close the dialogue box and return you to the notes detail screen.

3. Your file will be displayed in the Attachment field. Attachment file size is limited to 10MG per file. Each note will hold one attachment. There is no limit on how many files you place in the notes area.

4. Attachments must have an entry in the **Note** area.

5. When you are finished, click **Save**. The notes detail screen will close and you will be returned to the main notes screen. Your note and attachment will be listed.

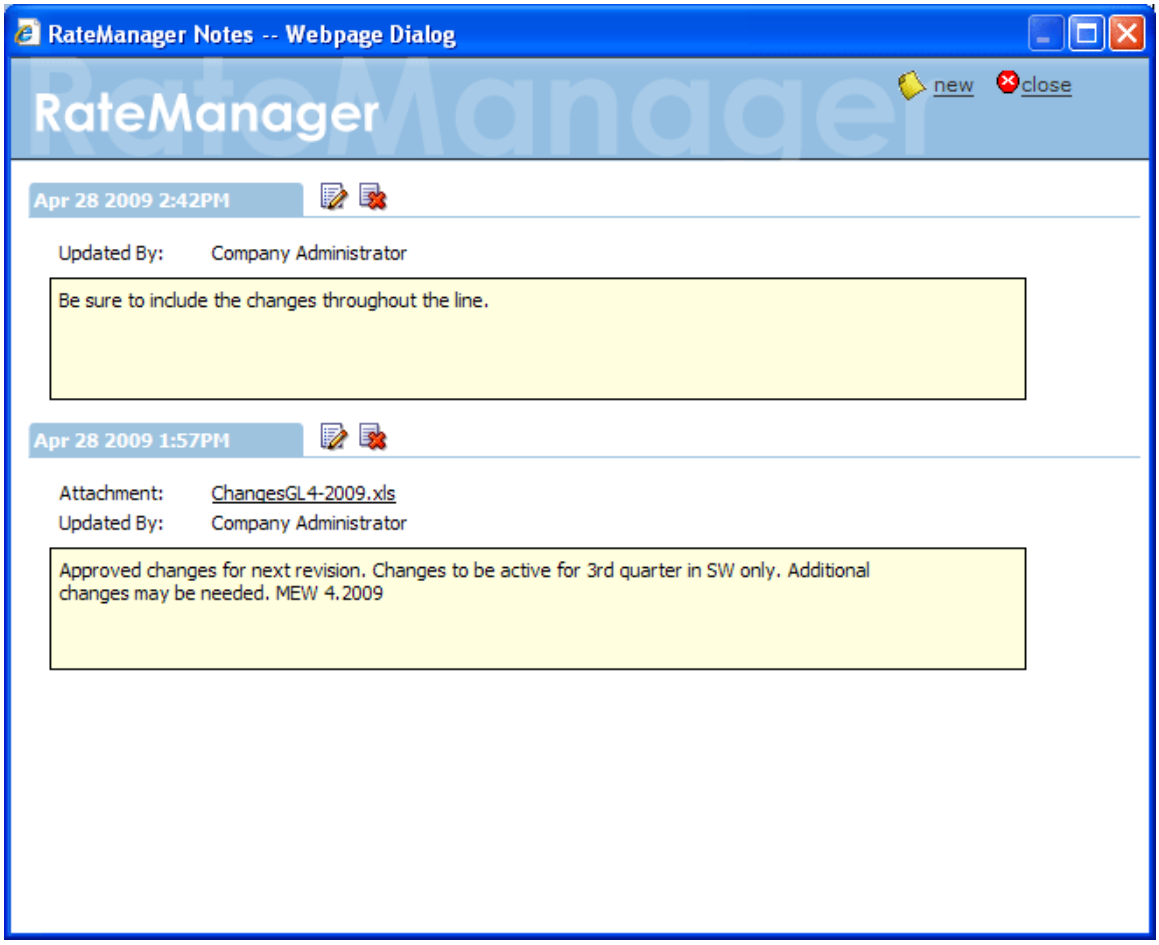


Figure 70 Completed Notes Screen

6. Enter any additional notes, if needed.

7. When you are finished, click **Close** to close the screen.

NOTE	Certain file types will be denied, such as exe, com, vbs, or dll. If you try to attach a document with this file extension, the command will be denied.

Viewing Attachment Files

After you have saved the note, you will be able to view the attachment. Click the attachment file you want to view. Your attachment will be displayed in a separate window, depending upon file type. Word documents will be displayed in MS Word, excel documents will be displayed in MS Excel, and PDF documents will be displayed in the Insbridge document viewer. These documents are read-only. You may be able to do a “Save-As” copy to your local hard drive but any changes you make will not be made to the attachment on the note.

If the attachment needs to be edited, you will need to go to the original source and edit there. For example, if you have uploaded a Word document, you will need to open the original file in Word, make your changes there and save the file. Then you can return to your note and reattach the updated file.

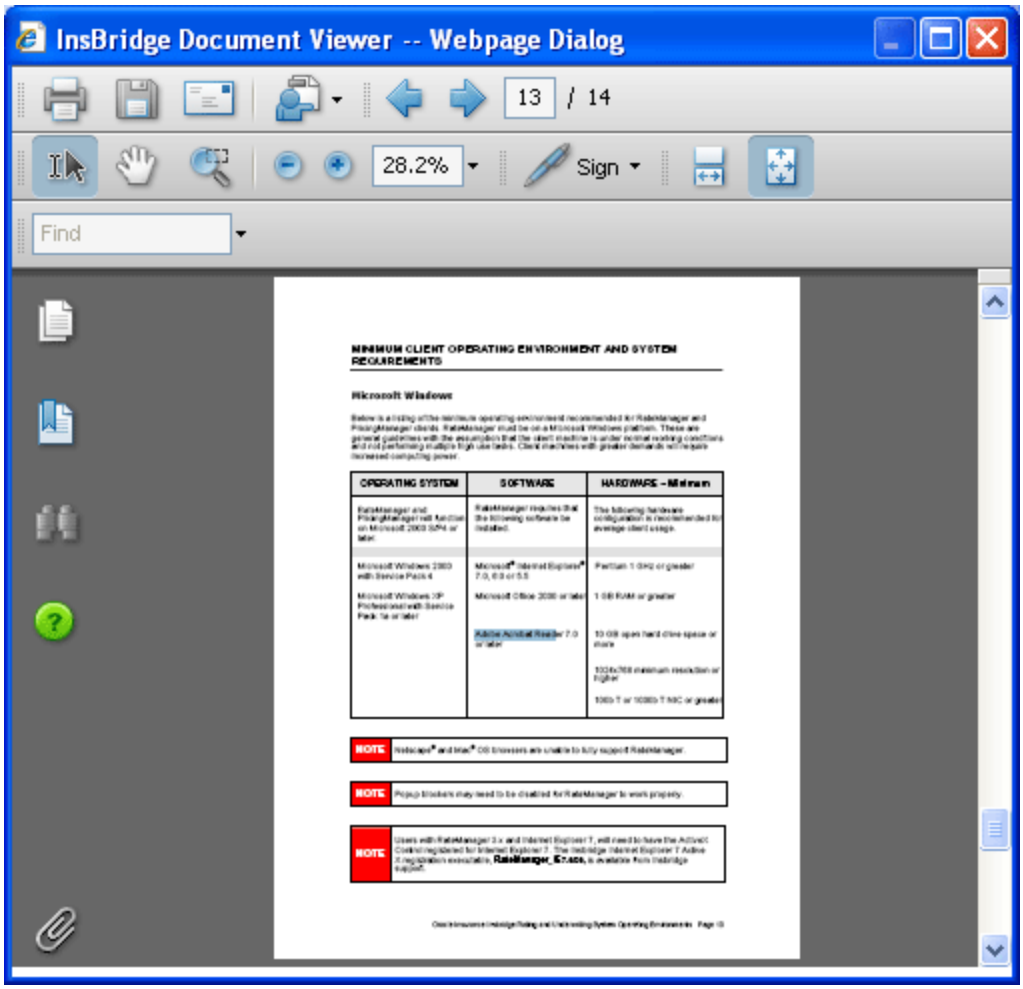


Figure 71 PDF File in the Insbridge Document Viewer

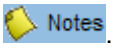
NOTE	When you do a “Save As” from the Insbridge Document Viewer, you should rename the file. By default, when you go to save a file in the Insbridge Document Viewer, everything will be named “InsbridgeDocument”. It is recommended that you re-name the file.

Remove Attached Files

Attachments cannot be deleted. To remove an attachment, you can delete the entire note. If you would like to replace the attachment, you can edit the note and select another file. This will replace the first attachment.

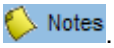
Editing Notes

Notes can be edited at any time.

1. Highlight the program version or element that contains the note you want to edit.
2. Click the Notes button  . The main notes screen will be displayed.
3. Click the Edit button on the note you want to edit. The notes detail screen for that note will be displayed.
4. Make your changes.
5. Click **Save** to save your entry and return to the main notes page.
6. When you are finished, click **Close** to close the screen.

Deleting Notes

Notes can be deleted at any time. If you delete the last note, the notes icon will not be displayed in front of the program version or element.

1. Highlight the program version or element that contains the note you want to delete.
2. Click the Notes button  . The main notes screen will be displayed.
3. Click the Delete button on the note you want to delete.
4. A warning message will be displayed. Click **OK** if you want to delete the note. Cancel will return you to the notes detail screen without any changes being made.
5. Click **Close** to close the screen.

NOTE	Please take care when deleting notes. This action cannot be undone.

Change Control

Change control allows for a tracking identifier and justification to be added to an element revision or a program revision. If change control has been activated, it will be mandatory to make an entry to any element or program when it is revisioned. If change control is not activated, the option will not be presented. Any program, mapped, linked or calculated variable, and algorithm that can be revisioned can require a change control entry. Change control will only be required at the time the program or element is revisioned.

- Change control uses the same screen as the notes feature. From the main notes screen, you can delete a change control. No additional change controls can be added.
- Change controls cannot be edited.
- Only one change control per revision is allowed.

- When an element or program revision has a change control, the notes icon will be displayed in front of the program or element revision. The notes icon will not be placed at the program level, only at the version level. The notes icon will be displayed at the element level, but only if the active revision has the change control. If only a non-active revision of an element contains a change control, the notes icon will not be displayed at the element level.

- Change controls entered on global elements and linked variables will be carried through to all instances of the element revision or linked variable revision. This means that if you enter a change control on revision 3 of a variable that is linked to 10 others, the note will be displayed on revision 3 of each of the linked variables. Likewise a change control entered on a global variable will be displayed on that variable throughout the subline.

- To view the change control, highlight the element and click the Notes button. Your note will be displayed in a separate screen.

NOTE	Change controls are not carried through to packages, copies or new revisions.

Adding Change Control

A change control will be added at the time the revision is created if required. The change control option must be turned on by an administrator. When activated, change control entries are mandatory. If the option is deactivated, no change control option will be presented.

1. Click the element or program where you want to create a new revision.

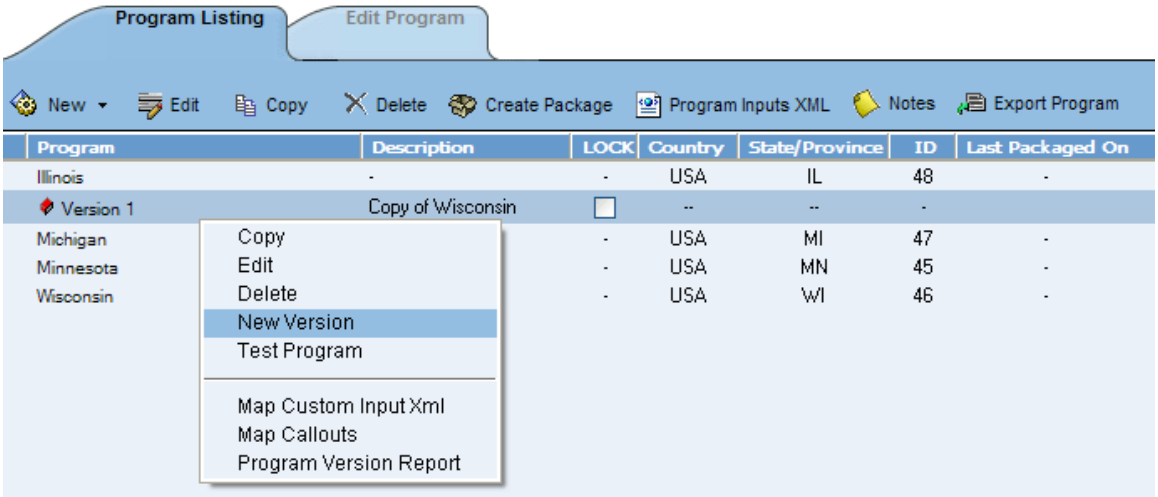


Figure 72 Adding a New Revision

2. If change control is required, a separate screen will be displayed.

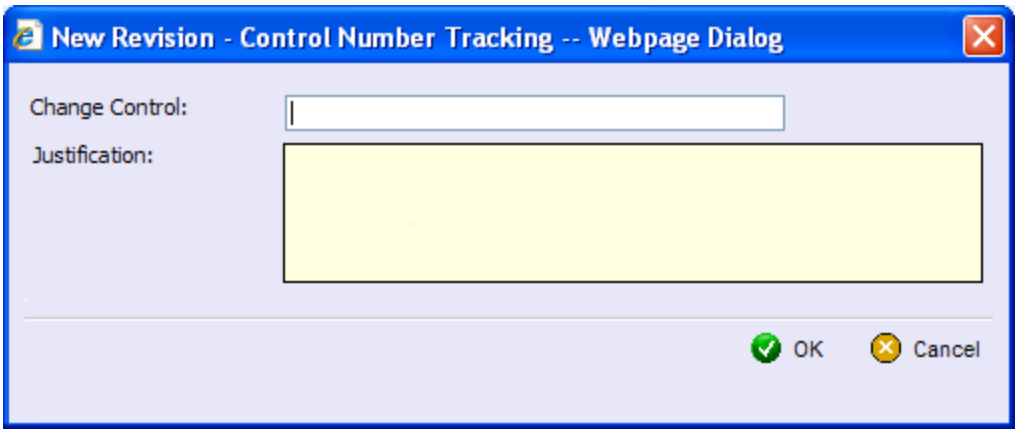


Figure 73 Completing the Change Control Screen

3. Enter the change **control tracking ID** and the **justification**.

   A change control justification can contain up to 200 characters including spaces. Alpha/numeric characters as well as periods (.) and underscores (_) are allowed. No other punctuation or special characters are allowed.

   When you enter your change control, you will be able to type the justification directly in or you can paste a justification from an outside source. Be aware that you may type or paste in more than 200 characters, but the justification field will only save the first two hundred. Any extra characters will be cut off. You must make an entry. Blank change controls are not allowed.

NOTE	Verify your entry before saving. Change controls cannot be edited.

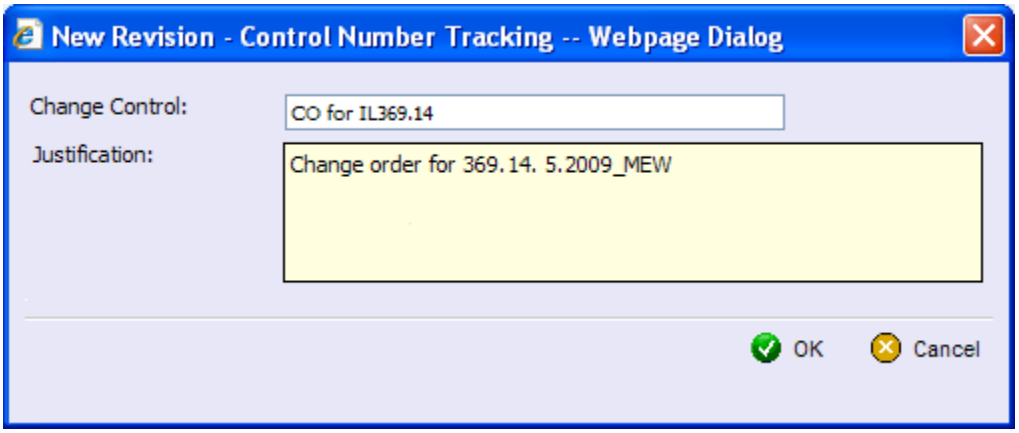


Figure 74 Completed Change Control

4. Click **OK**. The change control screen will close and you will be placed on the revision details screen for the element or program version.

5. When you complete your revision, your change control will be listed on the notes screen for that revision. Notes may be added after the revision has been created. Notes are listed in date order of newest to oldest with the newest note first. The change order will be the oldest item on the notes screen.

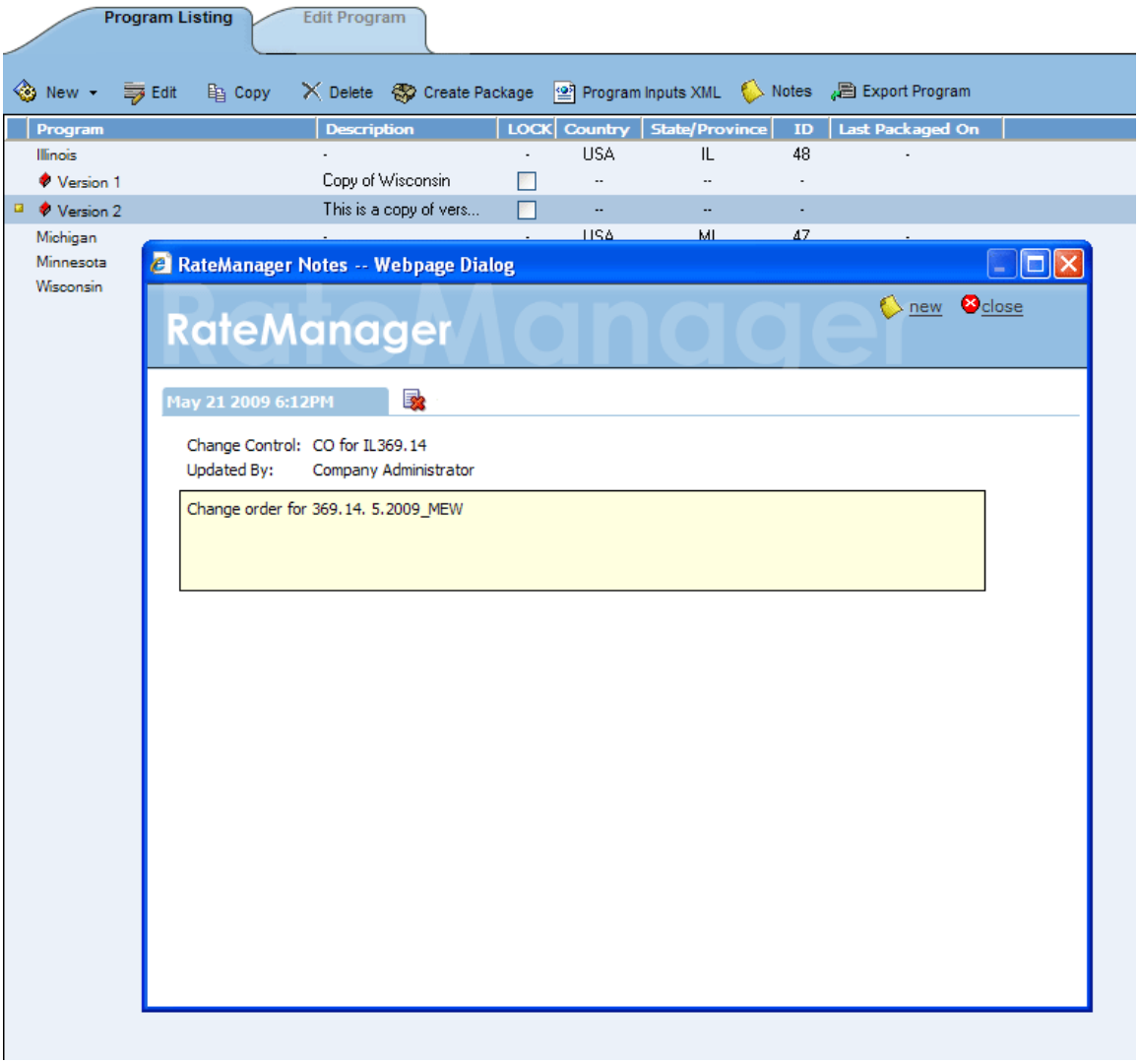


Figure 75 Completed Revision with Change Control

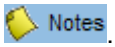
Keyboard Shortcuts

You cannot use your mouse right click features to cut and paste however, you can use your keyboard controls. Highlight the text you wish to cut or copy. Use the Control Key plus the letter key to either ”C” copy or “X” cut. Position your cursor where you want your text to be placed. Use the Control Key plus the letter key “V” to paste.

- **Control + X** will cut text.
- **Control + C** will copy text.
- **Control + V** will paste text.

Deleting Change Control

Change controls can be deleted at any time. If the change control is the only item on the notes screen and you delete it, the notes icon will not be displayed in front of the program version or element.

1. Highlight the program revision or element revision that contains the change control you want to delete.
2. Click the Notes button 

. The main notes screen will be displayed.
3. Click the Delete button on the change control you want to delete.
4. A warning message will be displayed. Click **OK** if you want to delete the change control. Cancel will return you to the notes detail screen without any changes being made.
5. Click **Close** to close the screen.

NOTE	Please take care when deleting change controls. This action cannot be undone.

Exporting a Program

RateManager export feature provides users with the ability to export all elements of a program from one database to another database or within the same database. This feature is available to user generated programs only. Template generated programs cannot be exported, even if they contain user created versions. All versions of a program will be exported. Individual versions cannot be exported. The functionality is accomplished through a wizard.

- All elements related to a program will be exported including:
  - Global Input Variables
  - Global Result Variables
  - Local and Global Mapped Variables
  - Local and Global Calculated Variables
  - Local and Global Algorithms
  - Sequencing
  - Program Versioning
  - Categories
- The export will include all revisions of local variables and algorithms.
- Notes will not be included.

NOTE	You must have the RateManager Program Admin rights to export a program. If this option is not displayed, you do not have the rights to export. Please contact your system administrator if you need to export a program.

To Export a Program

1. Navigate to the **Program Listing** screen for the subline and folder that contains the program you want to export.
2. Select the program you want to export and either click Export Program or right click it and select **Export Program – All Versions** from the popup menu.

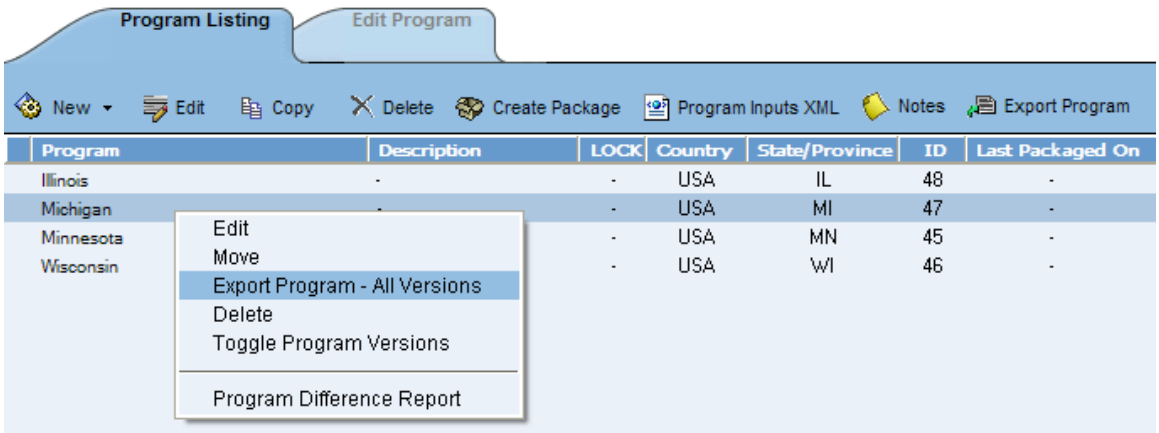


Figure 76 Selecting a Program for Export

3. The Export Wizard will be displayed.

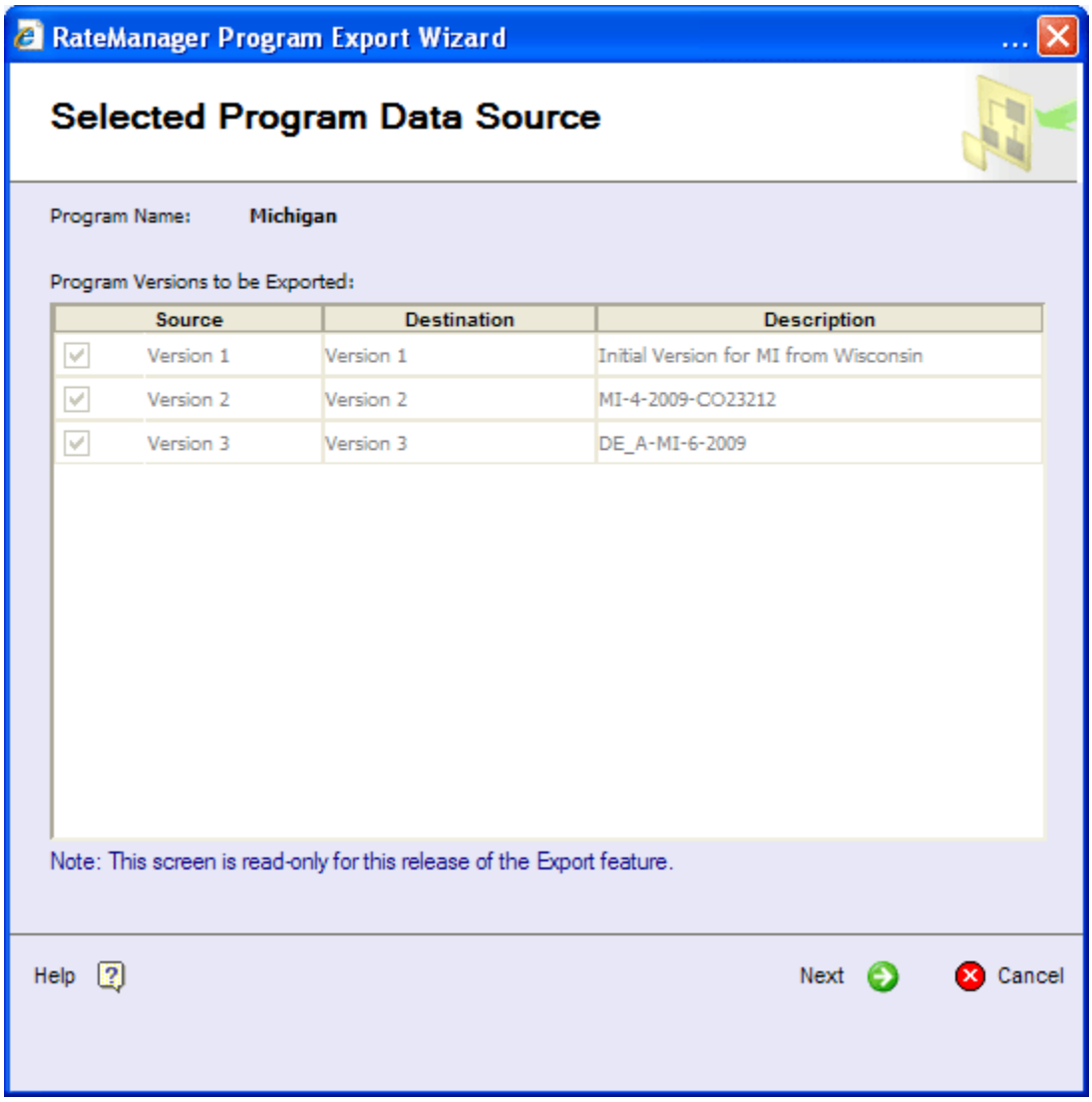


Figure 77 Select Program Data Source

4. The Selected Program Data Source shows the current program selected and all versions pertaining to that program. Verify that this is the program you want to export. To select another program, click Cancel to close the wizard and return to the program listing screen. If this is the correct program, click **Next** to continue.

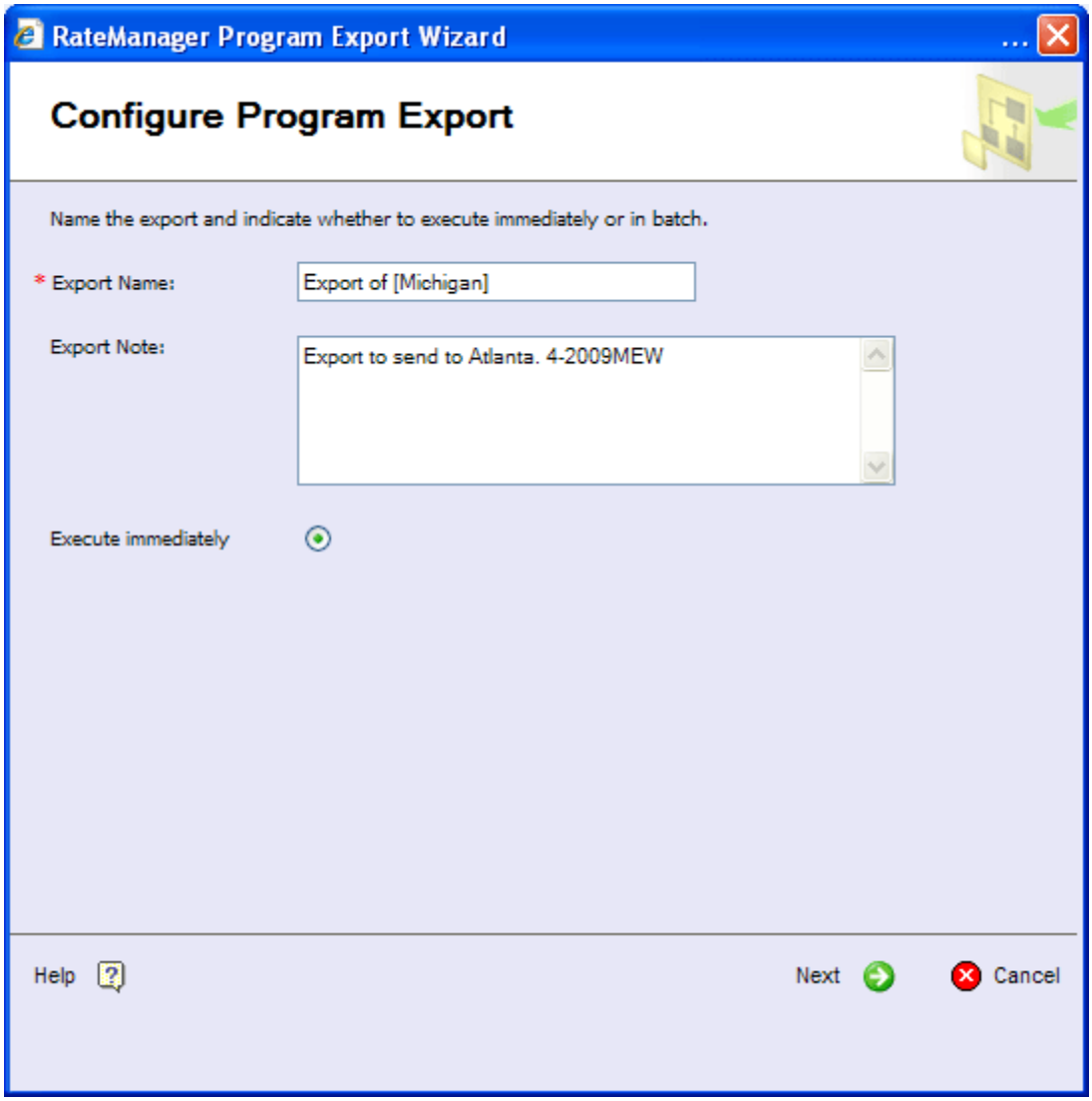


Figure 78 Configure Program Export

5. The Configure Program Export screen allows you define the export and select the processing option.

   - **Export Name:** Enter a name for the export file. The default name that will appear is Export of [*name of program being exported*]. This field is mandatory.
   - **Export Note:** You can add notes to the export file. The notes can be displayed on the Import listing screen and when you select “Get Summary” from the import listing screen.
   - **Execute immediately:** The export will be processed immediately. You will have to wait for the process to finish before you can return to RateManager.

   After you have entered your information, click **Next** to continue. For this example, we will select immediately.

6. The next screen will display a summary of the choices you have made. If everything is correct, click **Next** to continue. If you'd like to make changes, click Cancel to close the wizard and begin again.

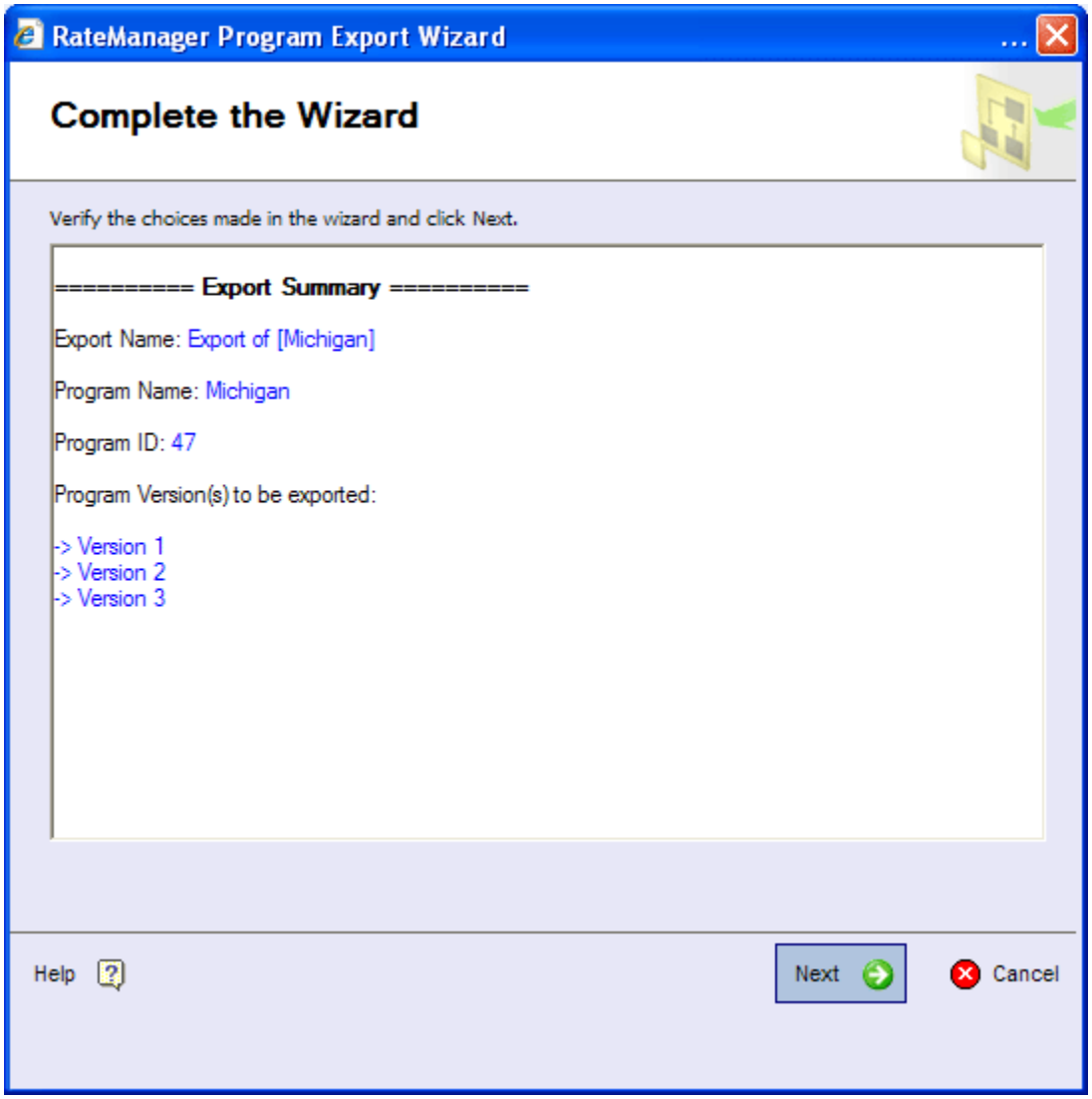


Figure 79 Export Summary

7. The Exporting Program Data screen will display the progress bar of the overall export at the top. The body of the screen will display a list of elements being exported and the steps of the import process.

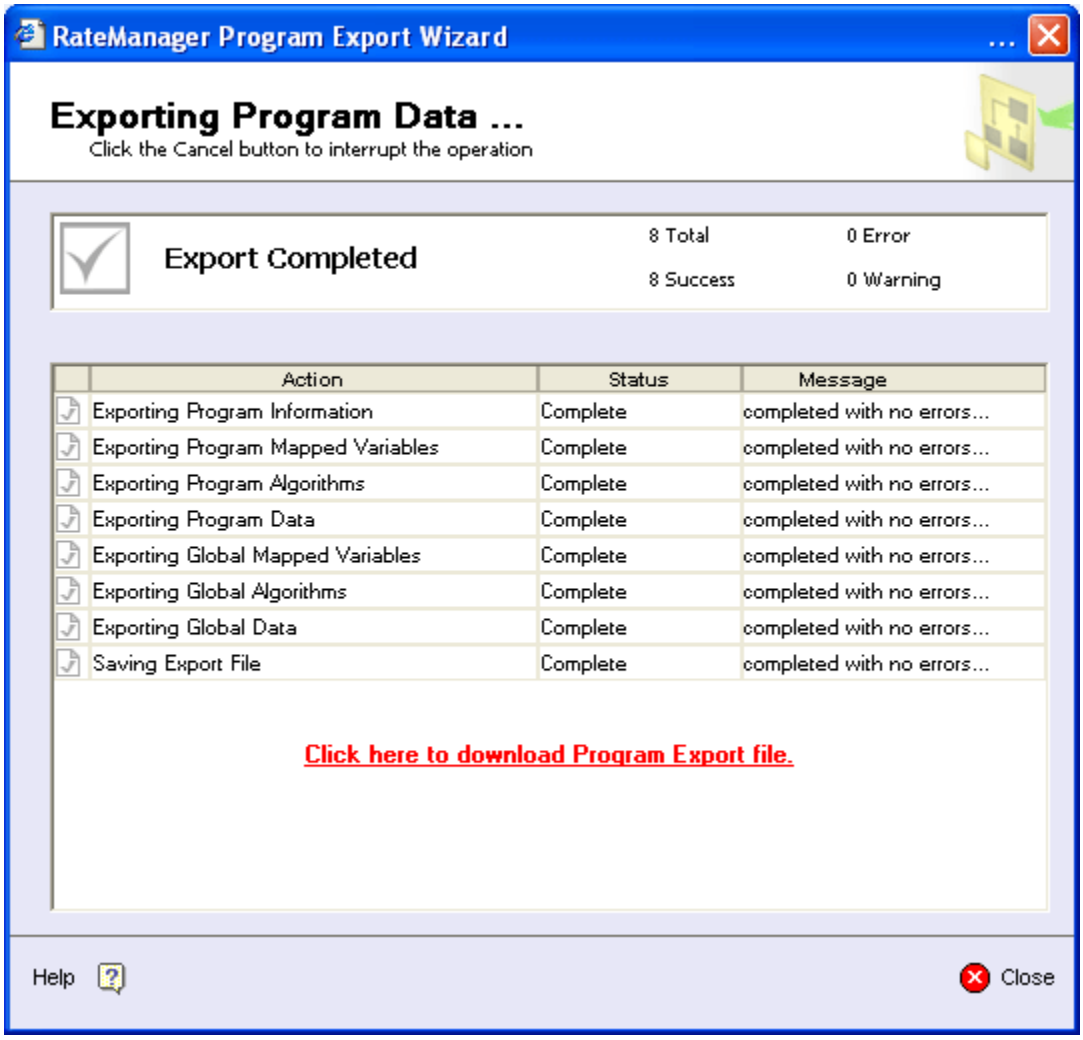


Figure 80 Exporting Program Data Screen

When the export is finished, you will receive a success or failure message.

Once export is complete, a red hyperlink will be displayed. Click here to download Program Export file. Click this link to download the file.

Export File Rules

- All exported files will have an extension of .pxf (Program Export File)
- All exported files will have a default prefix of “programExport_”,
- You can change the default name by clicking on the “Save” button on the popup above.

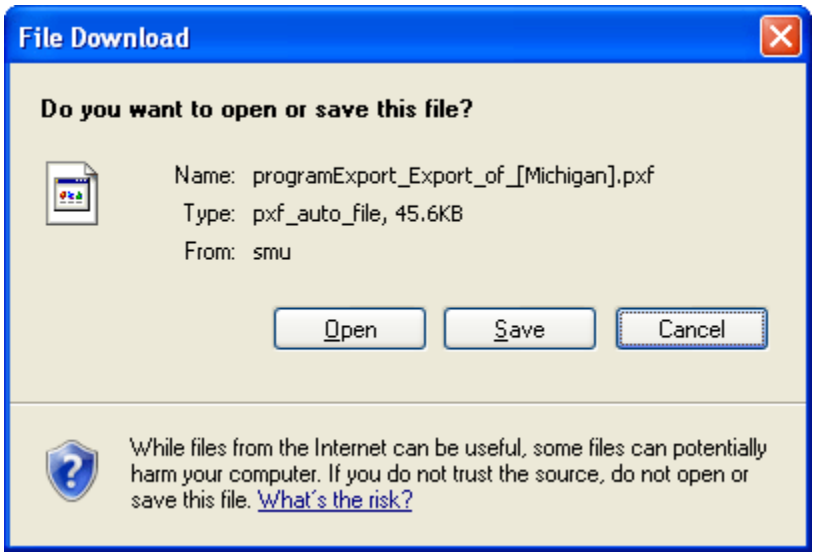


Figure 81 Save Export

Click **Save** to save the program to your local drive or network. Your computers dialogue box will be displayed. Select the location for the export and click **Save**. When the file is finished, you will have the option to Open, Open Folder or Close. Select **Close**.

After you have saved the export, close the wizard.

Right Click Menu Options

On any individual program version, a right click menu will be available on both the Program Listing screen and on the navigation menu on the left.

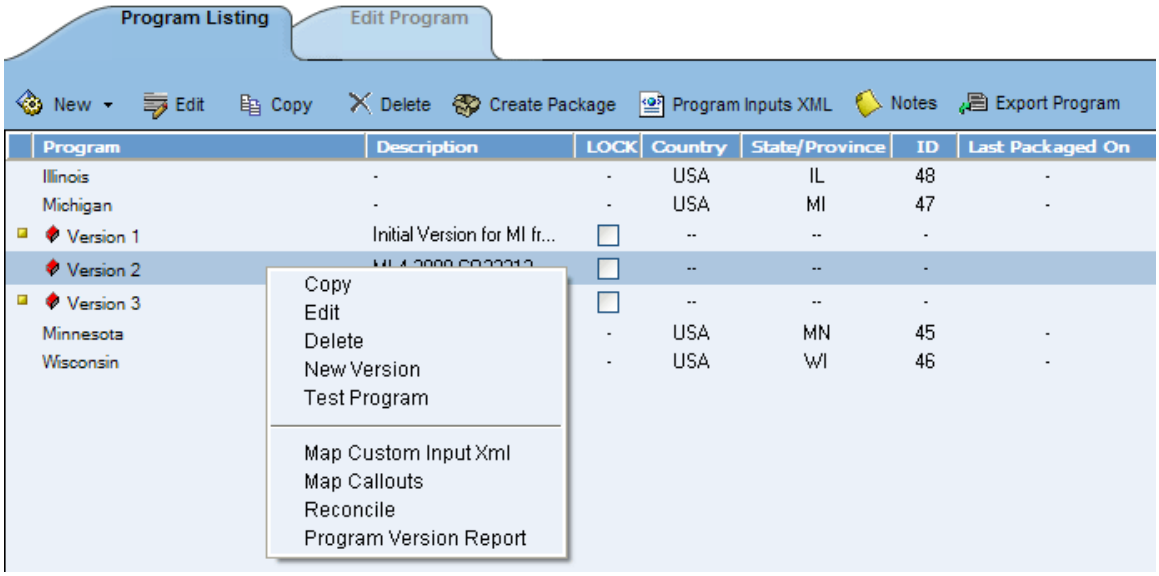
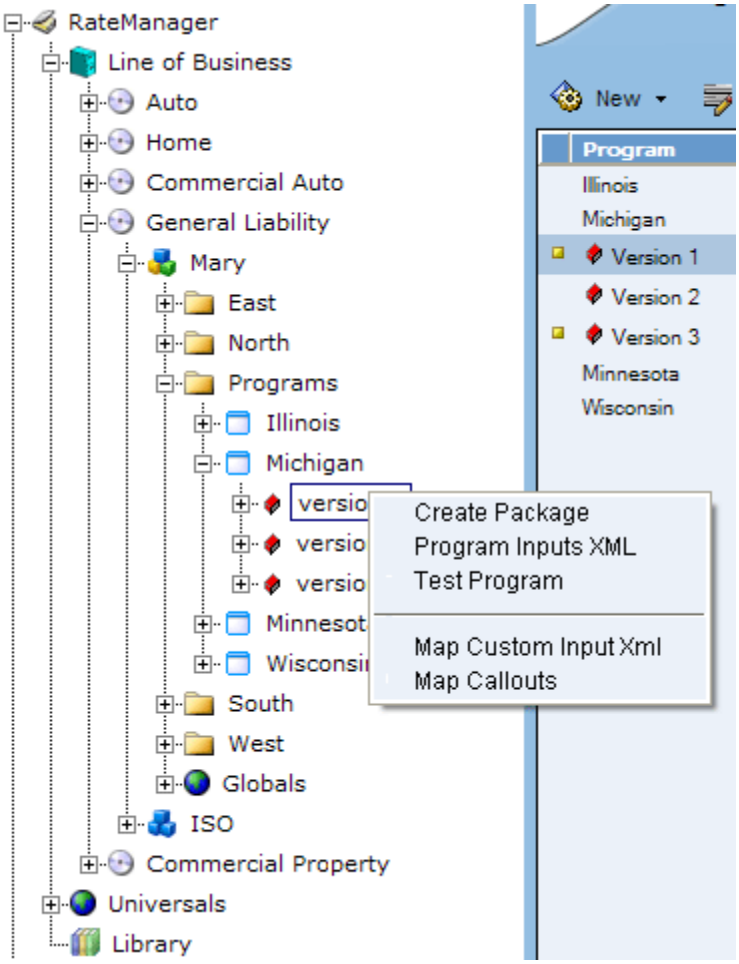


Figure 82 Right Click Menu for Program Listing

The selections are:

- **Copy** – Copies the selected program version. See Copying a Program.
- **Edit –** Allows for editing of a program version. Editing a Program Version.
- **Delete** – Deletes the selected version. See Deleting a Program Version.
- **New Version** – Creates a new program version from the selected program version. See Creating a New Program Version.
- **Test Program** – Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.
- **Map Custom Input XML** – Clicking this option will bring up the Input Variable Mapping screen for this program version. This screen allows you to enter, view, import or upload input mappings. See Introduction to Input and Output Mapping.
- **Map Callouts** – Clicking this option will allow you to map this program version to callout to other programs or libraries. See Callouts.
- **Reconcile** – This option will only be displayed if there is more than one version of a program. Clicking this will allow you to run a comparison between the selected program and a later version. See Reconcile.
- **Program Version Report** – Displays the program version report. See Program Version Report.

To view the right click menu option for the navigation window on the left, select the program version you need and right click. The available menu choices will be displayed.



The selections are:

- **Create Package** – Packages the selected program version for rating and testing. See Introduction to Packaging for more information.
- **Program Inputs XML** – Clicking this will bring up a popup that shows a listing of inputs used by the selected program version.
- **Test Program** – Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.
- **Map Custom Input XML** – Clicking this option will bring up the Input Variable Mapping screen for this program version. This screen allows you to enter, view, import or upload input mappings. See Introduction to Input and Output Mapping.
- **Map Callouts** – Clicking this option will allow you to map this program version to callout to other programs or SoftLibraries.

Callouts

Callouts are programs and/or SoftLibraries that are used by the initiating program to run another program or call to an outside party. The callout program and/or SoftLibrary is a step in an algorithm. When the algorithm is executed, the callout will run the selected program and/or SoftLibrary and return with results that can be carried further into the rating.

Programs are the programs that are available within the subline where you are currently working. When a program makes a callout to another program that may be referred to as a P2P – a program to program call. 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. When a program makes a callout to a library that may be referred to as a P2L – a program to library call.

NOTE	SoftLibraries are loaded into the IBFA by a system administrator. SoftLibraries will be displayed in RateManager only after they have been loaded into IBFA. If a SoftLibrary you need is not available, please contact your system administrator to have it added.

When creating an algorithm, you can have a single program callout or multiple program callouts, a single SoftLibrary callout or multiple SoftLibrary callouts or any combination of programs and SoftLibraries within the algorithm.

If you choose to have multiple programs in an algorithm, please be aware that a program cannot make a callout back to the initiating program. This is circular logic and will result in an error.

You create Callouts by selecting the program or library that you want to run and then mapping the input, output and result variables. At this time, the driver/vehicle category found in Drivers Assignments cannot be mapped.

There is no limit to the number of callouts you can create.

You can map Callouts outside of the Callout creation window. The Mapping Callouts option is available on the **Program Listing** screen and version right click menu.

Navigating to Callouts

1. Navigate to the **Program Listing** screen for the subline and folder where the program version you want to map a callout is located.

2. After you select the version you want, right click it and select **Map Callouts** from the popup menu.

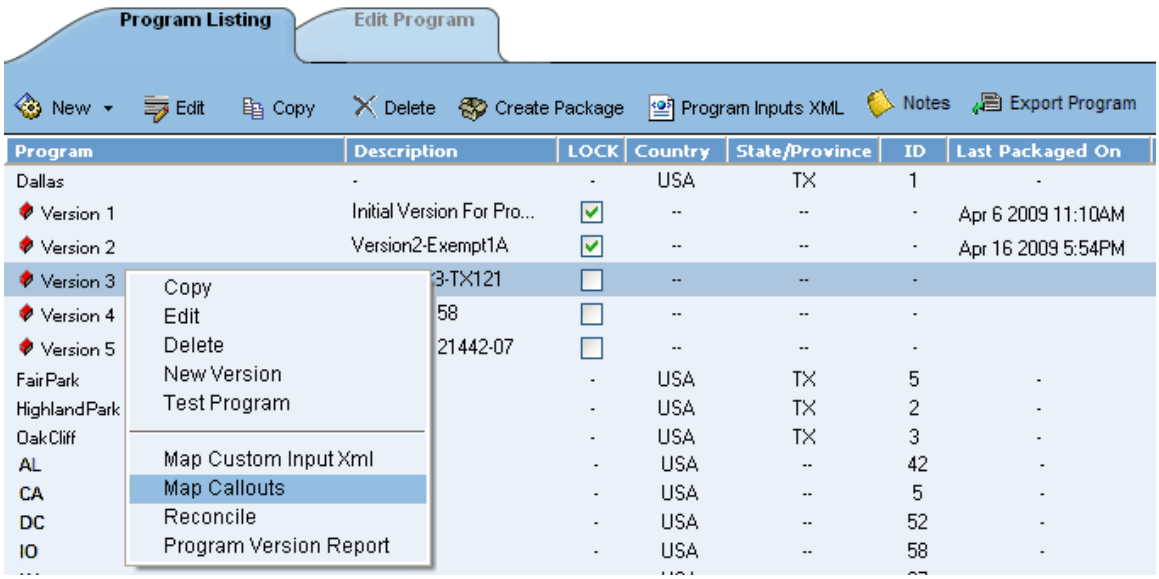


Figure 83 Navigating to Callouts

3. The Map Callouts screen will be displayed. If any callouts have been used, they will be listed.

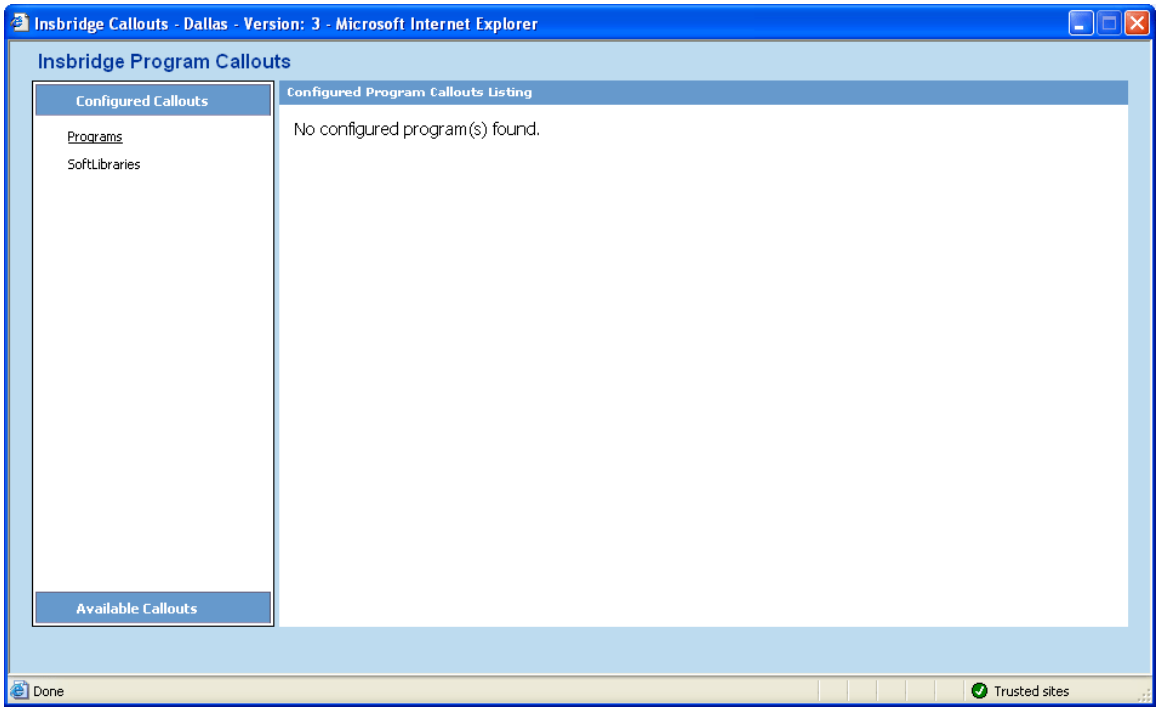


Figure 84 Map Callouts

Navigation Bar

The Map Callouts screen for the selected program version contains two main menus, each with submenus.

Configured Callouts: A list of the currently used callouts for this program version:

- **Programs:** This screen lists all configured programs that have been configured through the map callout screen.
- **SoftLibraries:** This screen lists all configured SoftLibraries that have been configured through the map callout screen.

Available Callouts: A list of available callouts for this program version.

- **Programs:** This screen lists all available programs that are in the subline of the selected line of business.
- **SoftLibraries:** This screen lists all configured SoftLibraries that have been made available for RateManager from within IBFA (Insbridge Framework Administrator).

Creating a New Callout

1. Begin creating a callout by selecting the **Available Callouts** tab.

2. Select the **Programs** link. The available programs for that subline will be listed in the description area to the right.

NOTE	The Program Version you are currently working from will not be listed.

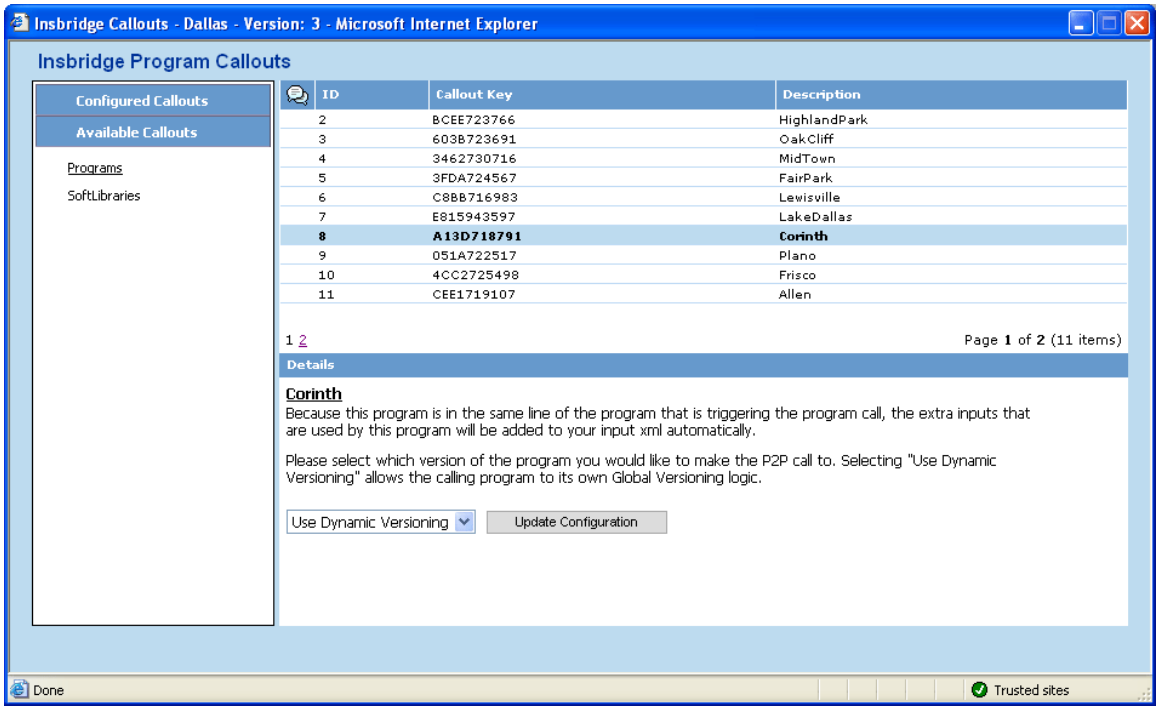


Figure 85 Selecting the Callout Key

3. Double click the **Program** you want to add to the callout. The details of the program will be listed in the **Details** area underneath.

4. The default versioning is Use Dynamic Versioning. This allows the calling program to use Global Versioning logic. If you want to use another version of the program, select it from the drop down menu in the **Details** area.

5. To add the program, click the Update Configuration button. The screen will refresh with the correct information.

NOTE	If the Update Configuration button is grayed out, the program has been added to the callout. Anytime you update the version, the Update Configuration button will be visible and you must run the update to add the selected version to the callout.

6. Add in as many programs as you need.

NOTE	A program that is selected for the callout will have a ✔ symbol in front of it. Programs can be removed from the Configured Callouts tab only.

Selecting SoftLibraries

The next steps in creating a new callout are adding in SoftLibraries. If you do not have any SoftLibraries to add in, you can proceed directly to mapping the inputs and outputs. See Mapping Callout Inputs and Outputs.

7. From the **Available Callouts** tab, select the **SoftLibraries** link. The available SoftLibraries will be listed in the description area to the right.

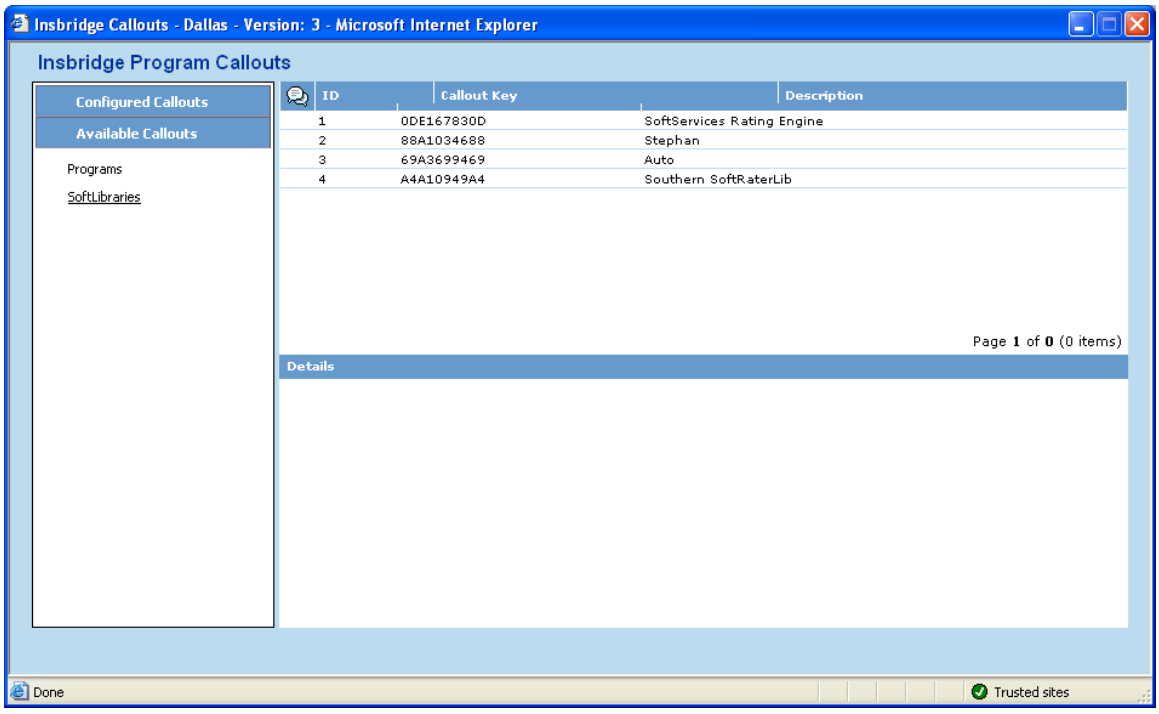


Figure 86 Verifying Callouts

8. From the **Available Callouts** tab, select the **SoftLibraries** link. The available SoftLibraries will be listed in the description area to the right.

9. To add the SoftLibrary, scroll to the bottom of the detail screen and click the

button. The screen will refresh with a ✔ next to the SoftLibrary you just added.

10. Add in as many SoftLibraries as you need.

Verifying your Selections

Before mapping, you should verify your selections. Programs can be added, removed or have version changes, SoftLibraries can be either added or removed.

11. Click the **Configured Callouts** tab. Select the **Programs** link. The programs you have selected will be listed in the description area to the right. Check to make sure you have the correct version. If you want to remove a program, click the **Remove** link. The program will be removed.

12. Next, select the **SoftLibraries** link. The SoftLibraries you have selected will be listed in the description area to the right. If you want to remove a SoftLibrary, click the **Remove** link. The SoftLibrary will be removed.

For more on deleting programs and SoftLibraries, see Removing a Program or SoftLibrary.

Editing a Program

If you need to select another version of a program, click the Available Callouts tab. Click the Programs link. Your selected programs will be displayed to the right. Double click the program you want to change. The details will be displayed below. Select the version you want and click Update Configuration to add this program version to the callout.

Mapping Callout Inputs and Outputs

Mapping must be performed for the callout to run successfully. At this time, the driver/vehicle category found in Drivers Assignments cannot be mapped.

13. You must set the Input and Output mappings for each program and each SoftLibrary selected.

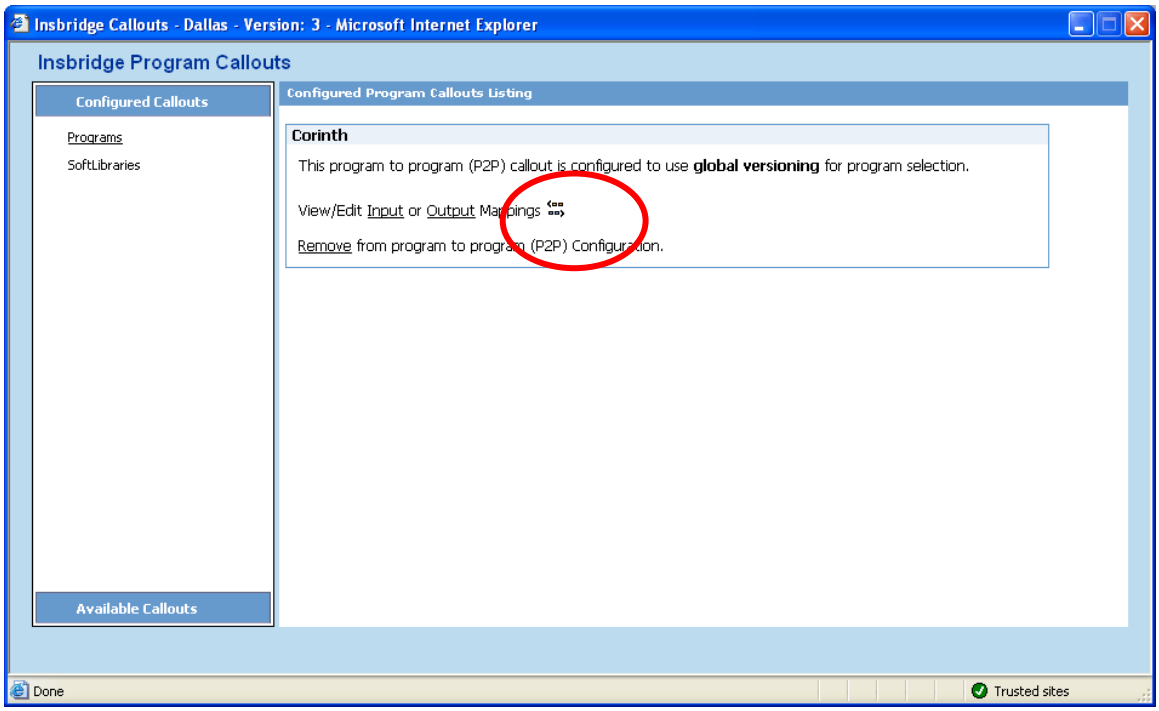


Figure 87 Mapping Callout Selections

14. From the Configured Callouts tab, click the Mapping link . A separate screen will be displayed. You will be placed on the Input Mapping screen first.

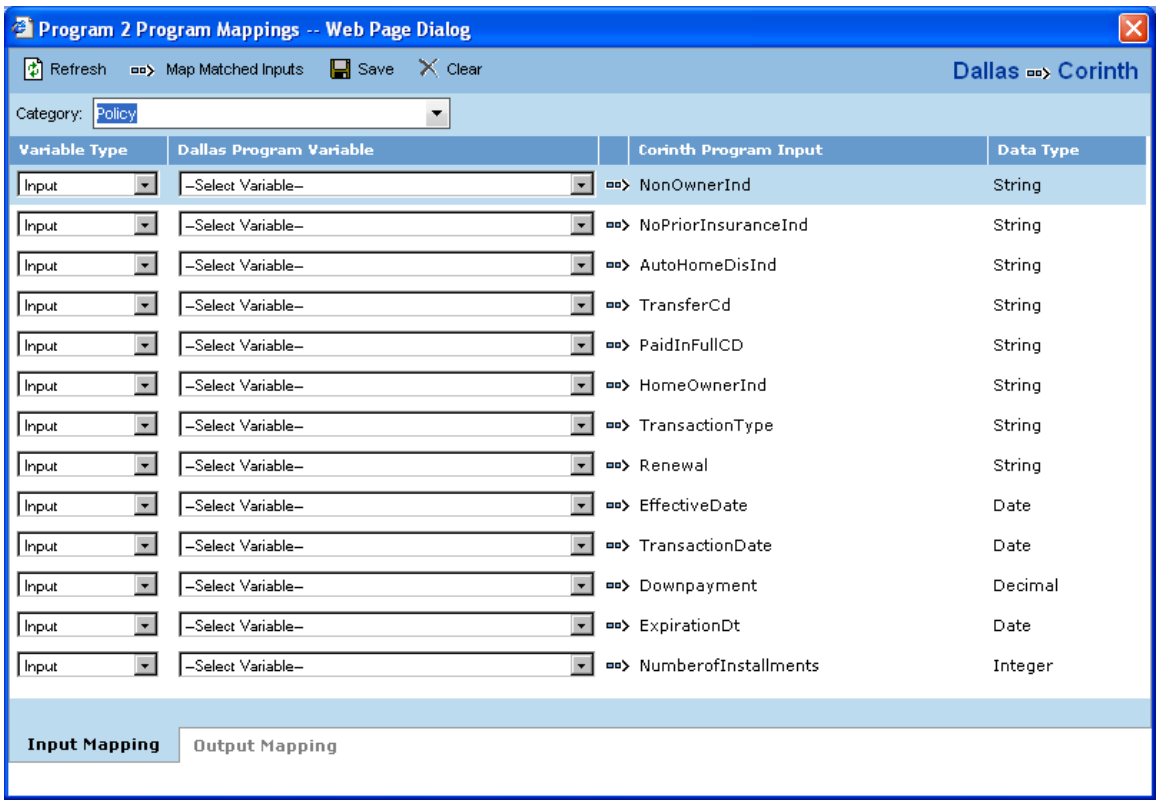


Figure 88 Mapping Inputs

15. There are two ways to map inputs.

    a. First select the category you want to map from the drop down menu at the top. Next, select the variable type and corresponding program variable from the drop down menus. After you have made your selections, you can view your entries by clicking the Refresh button.

    b. You can click the Map Matched Inputs button to automatically map the matching inputs.

NOTE	While it is not required, it is recommended that the policy category be mapped first. Mapping policy variables to program equivalents before you map other categories assures that your policy inputs have the closest possible match.

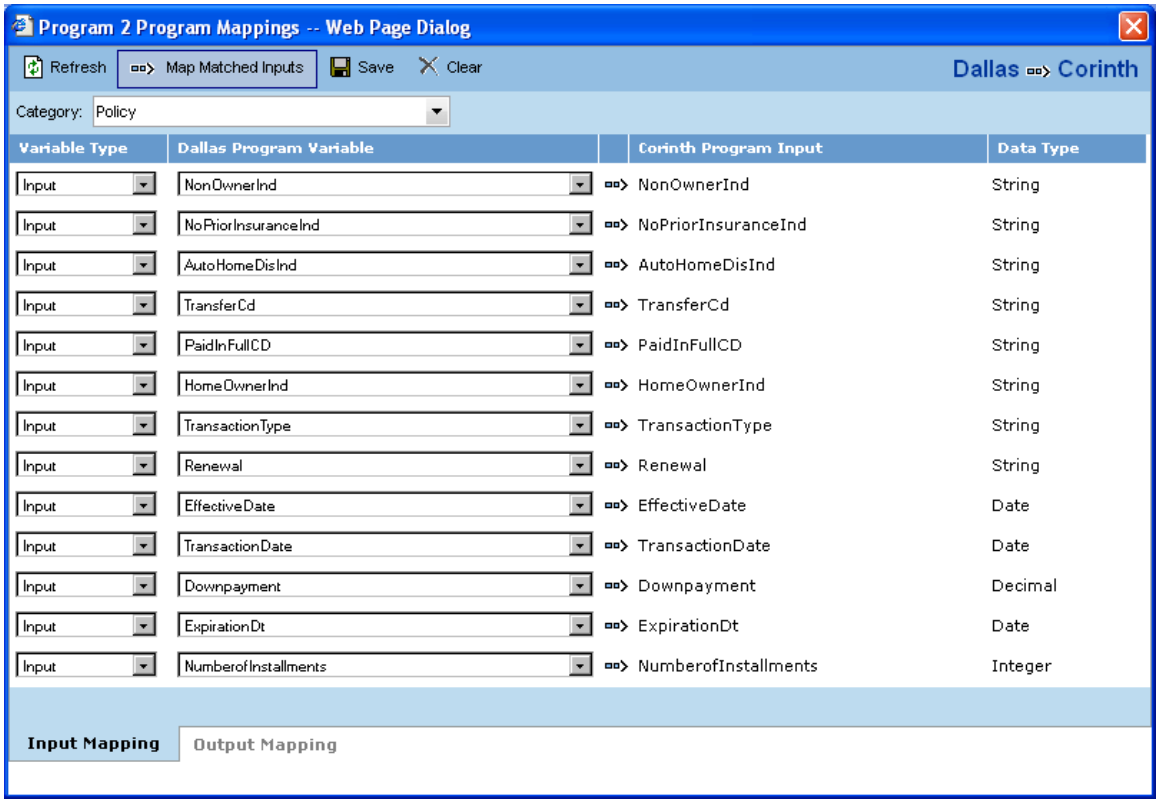


Figure 89 Mapping Inputs

NOTE	At any time you can clear all mappings by clicking the Clear button. This action cannot be undone. Make sure this is the action you want to take.

16. Verify your mappings. If they are correct, click the Save button to save your entries.

17. Select the **Output Mapping** tab at the bottom of the screen. This will open up the output mapping screen where you can map variables to results that are used.

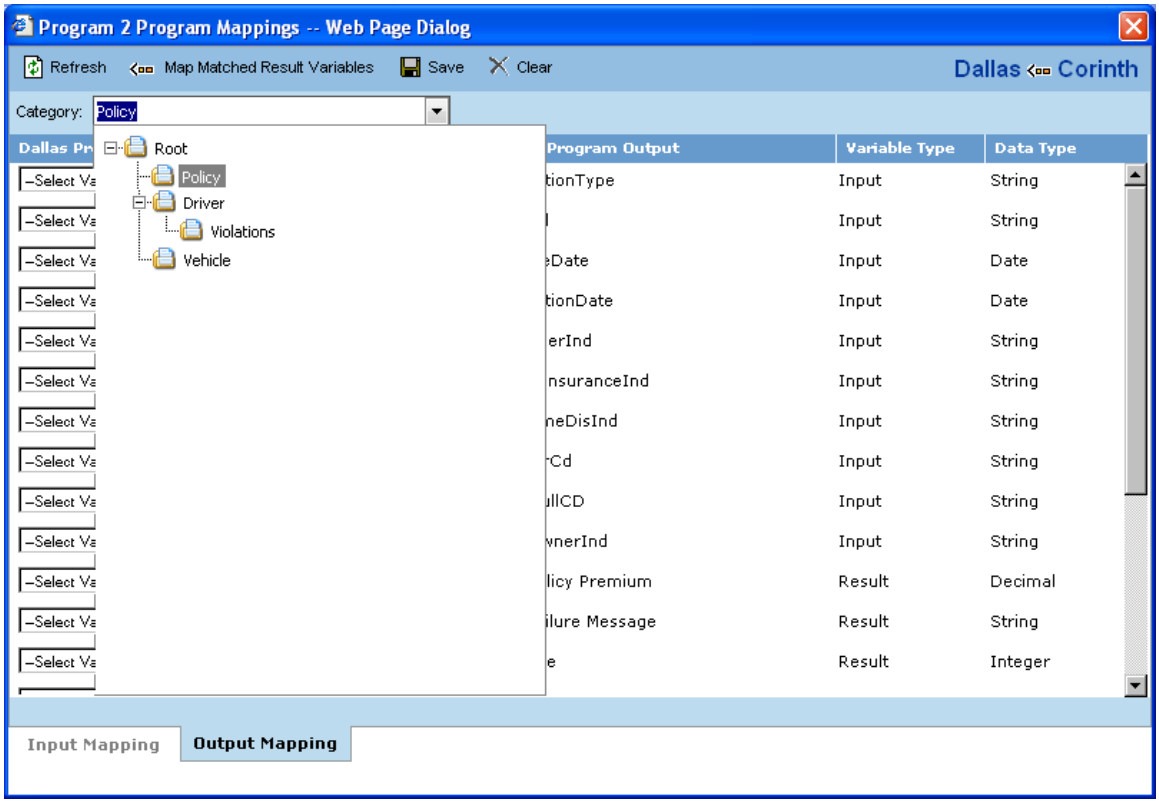


Figure 90 Mapping Outputs

18. There are two ways to map result variables.

    a. First select the category you want to map from the drop down menu at the top. Next, select the result variable from the drop down menus. After you have made your selections, you can view your entries by clicking the Refresh button.

    b. You can click the Map Matched Result Variables button to automatically map the matching results variables.

19. Do this for all result variables that you need mapped in every category.

20. Click the Save button to save your entries.

21. Close the Mappings screen. You will be returned to the Callouts screen. Your mappings will be in place.

NOTE	At any time you can clear all mappings by clicking the Clear button. This action cannot be undone. Make sure this is the action you want to take.

Creating a New Result Variable

You can create a new result variable at any time. Select **New Result Variable** from the drop down menu options.

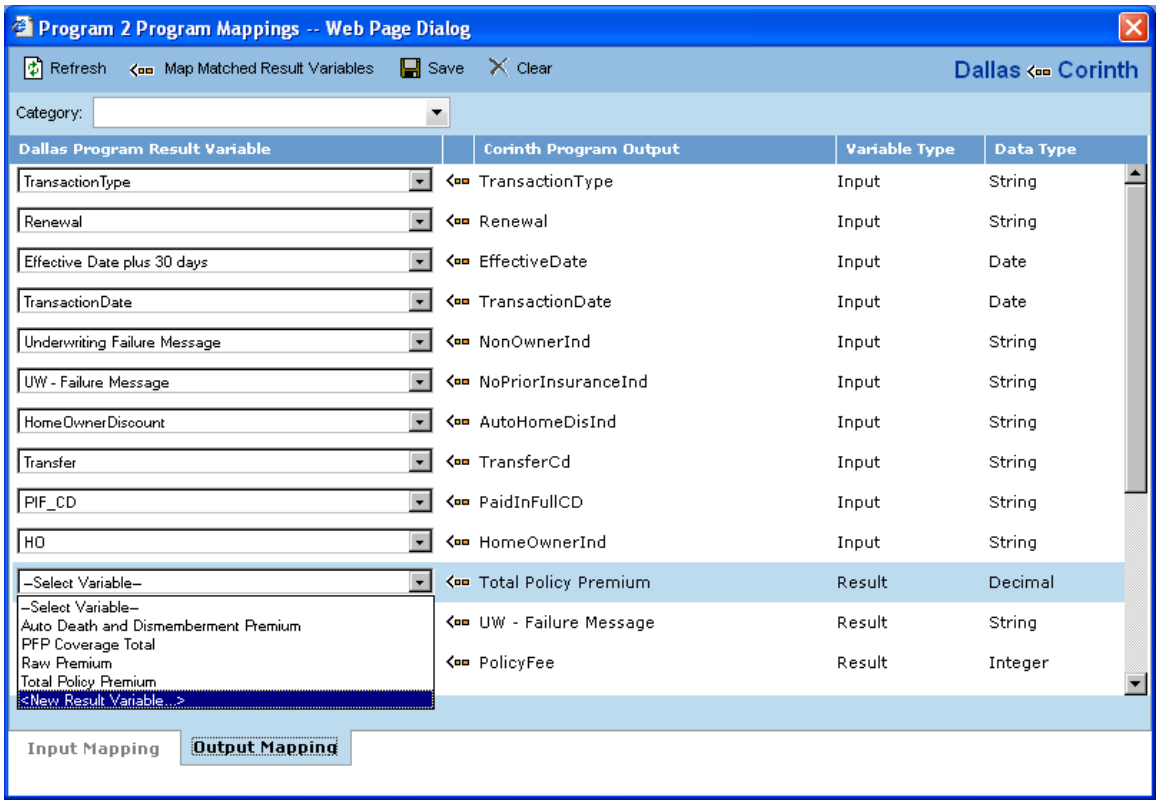


Figure 91 Creating New Result Variable

A separate screen will be displayed.

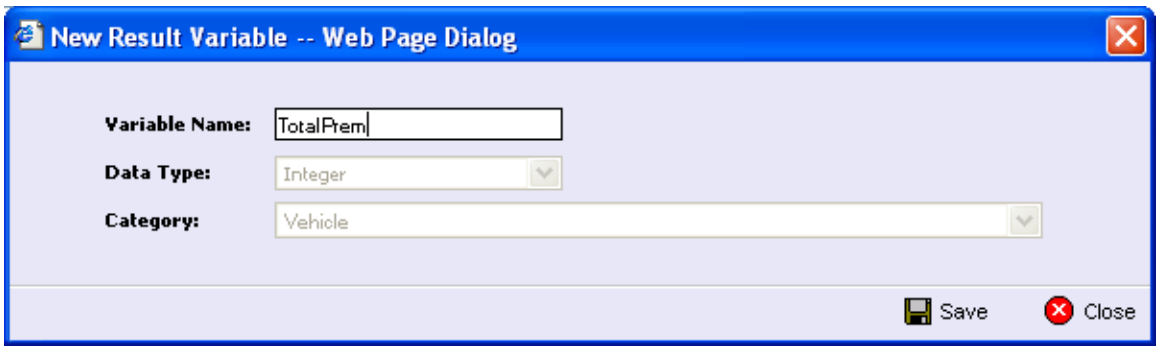


Figure 92 New Result Variable

Enter in the variable name and click **Save**.

You will be returned to the output mapping screen and your new variable will be listed.

Mapping SoftLibraries

After you have mapped your programs, you must map your SoftLibraries. It is recommended that you begin at the policy level.

22. From the Configured Callouts tab, select the **SoftLibraries** link. Click the Mapping link . A separate screen will be displayed. You will be placed on the Input Mapping screen first.

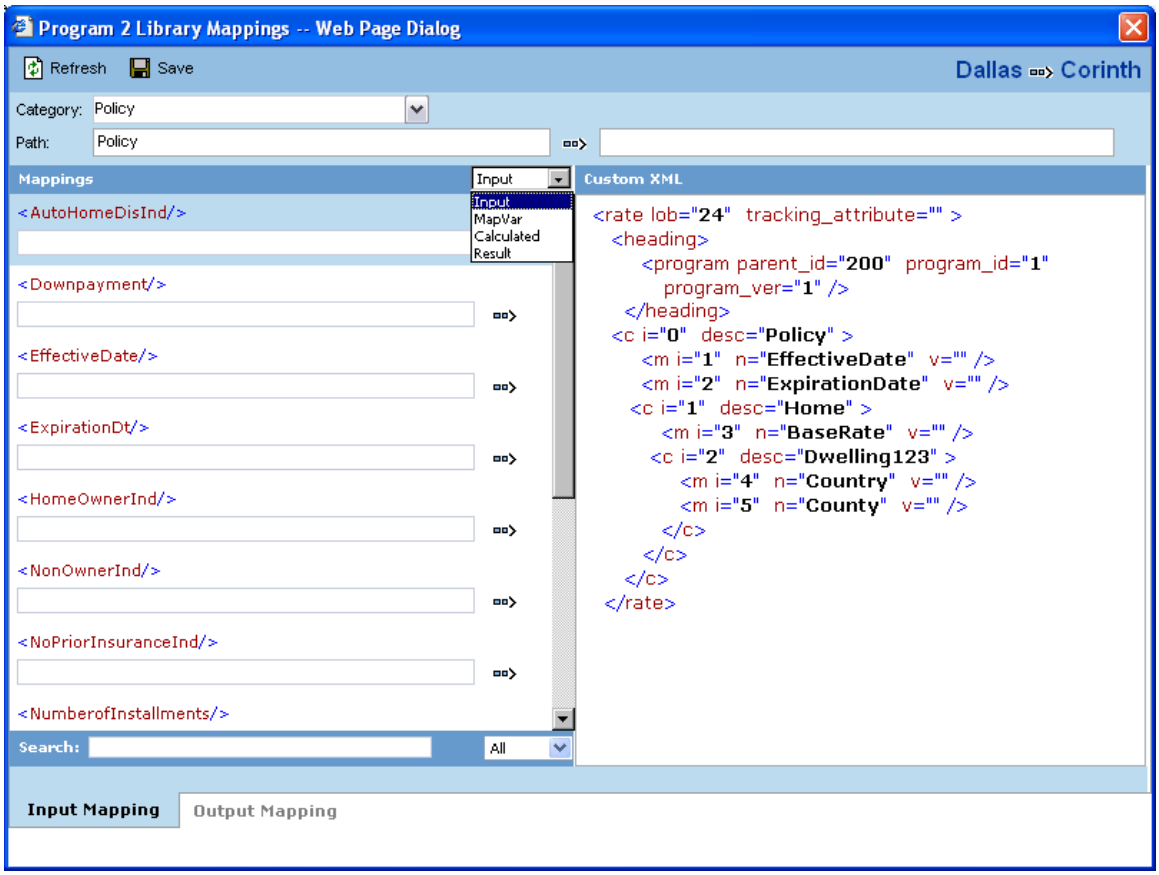


Figure 93 Mapping SoftLibraries Inputs

23. Select the category from the drop down menu at the top of the screen.
24. Enter in the corresponding input mapping path.
25. Select the variable type from the drop down menu.
26. Enter in the mapping. If your results do not populate the screen immediately, you can view your entries by clicking the Refresh button.
27. Do this for all result variables that you need mapped in every category.
28. Verify your mappings. If they are correct, click the Save button to save your entries.
29. Select the **Output Mapping** tab at the bottom of the screen. This will open up the output mapping screen where you can map variable to results that are used.

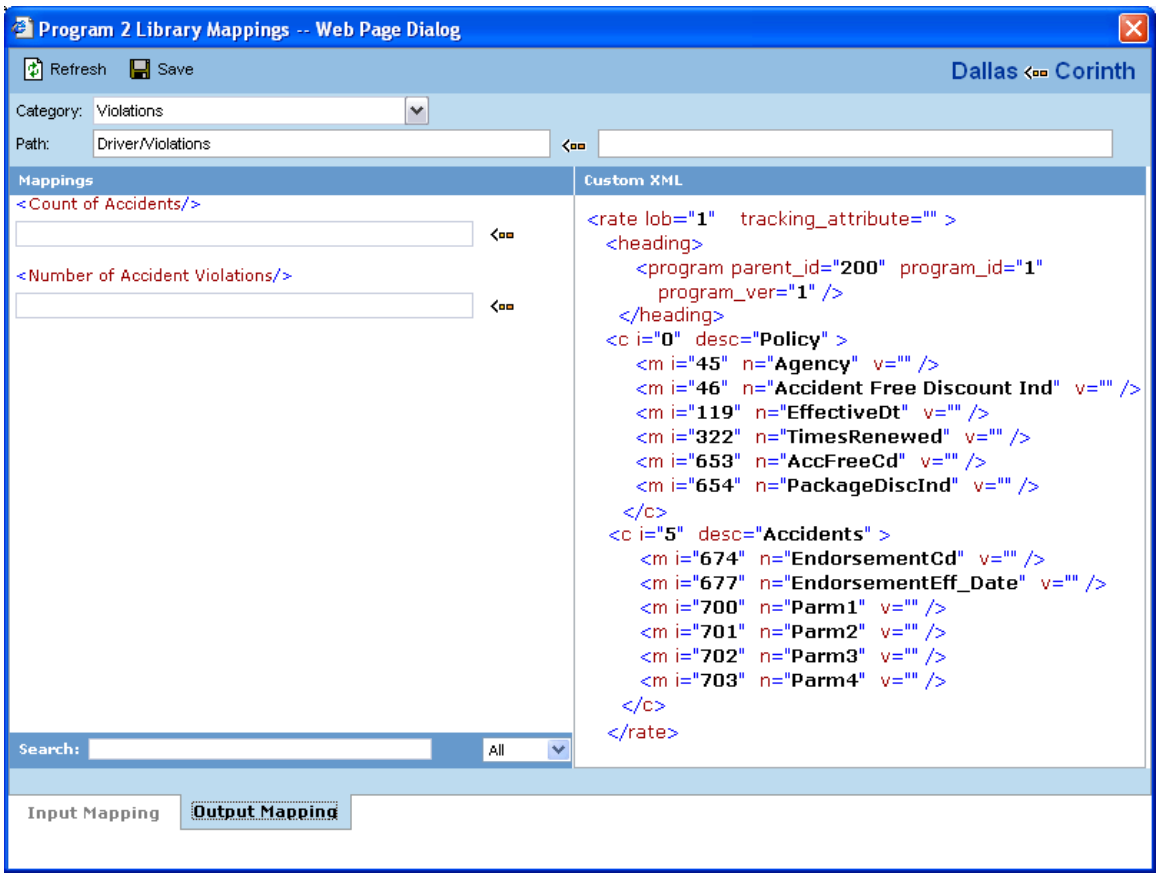


Figure 94 SoftLibrary Output Mappings

30. Select the category from the drop down menu at the top of the screen.
31. Enter in the corresponding output mapping path.
32. Enter in the mapping. If your results do not populate the screen immediately, you can view your entries by clicking the Refresh button.
33. Do this for all result variables that you need mapped in every category.
34. Verify your mappings. If they are correct, click the Save button to save your entries.
35. Close the Mappings screen. You will be returned to the Callouts screen. Your mappings will be in place.
36. Close the callout screen to return to the **Program Listing.**

Your callout is now ready to use.

Searching on the SoftLibrary Mapping Screen

You can search for result variables on the SoftLibrary mapping screens.

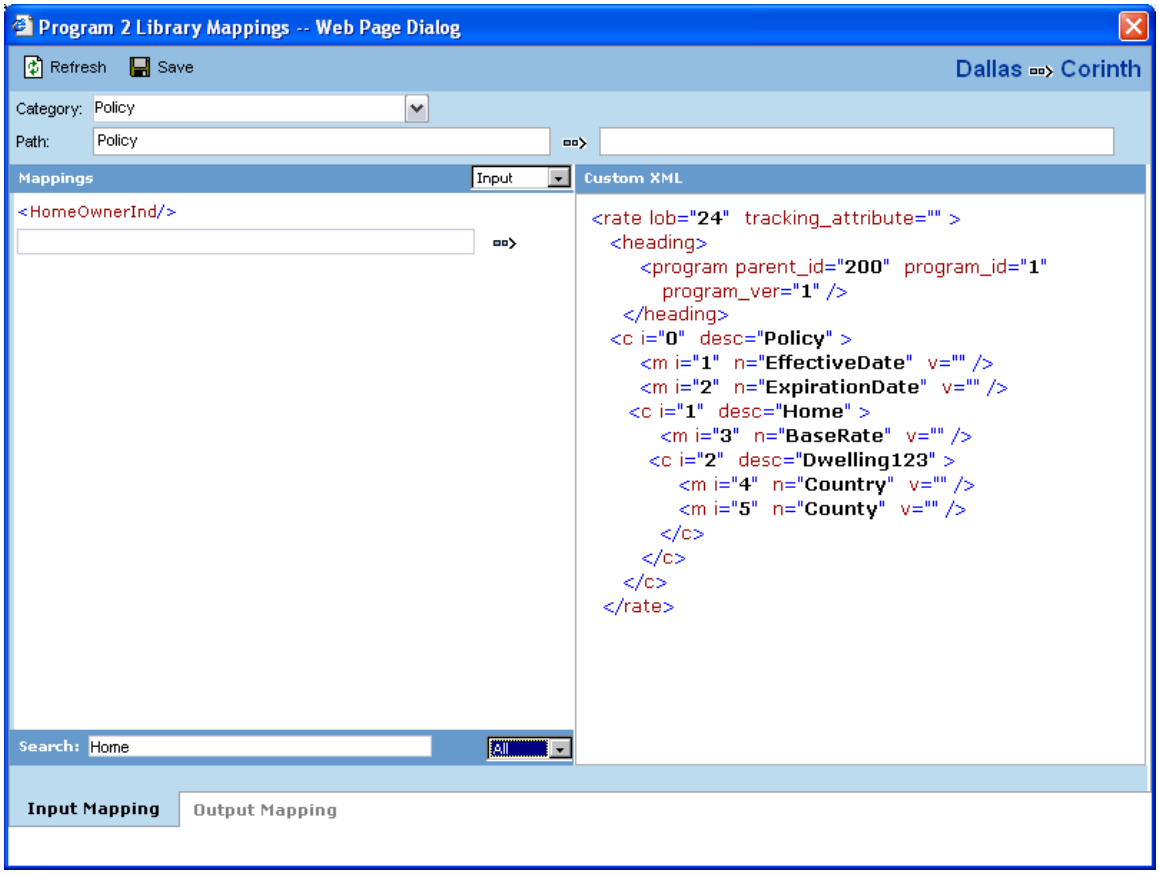


Figure 95 Completed Mapped Callouts Screen

Enter in your search criteria in the search window. Select if you want to search all variables or only mapped variables.

Results will be displayed in the left hand side of the screen.

Removing a Program or SoftLibrary

Programs and SoftLibraries can be deleted from a callout at any time. If you remove a program or SoftLibrary you are removing all associated mappings as well.

1. Navigate to the callouts screen.

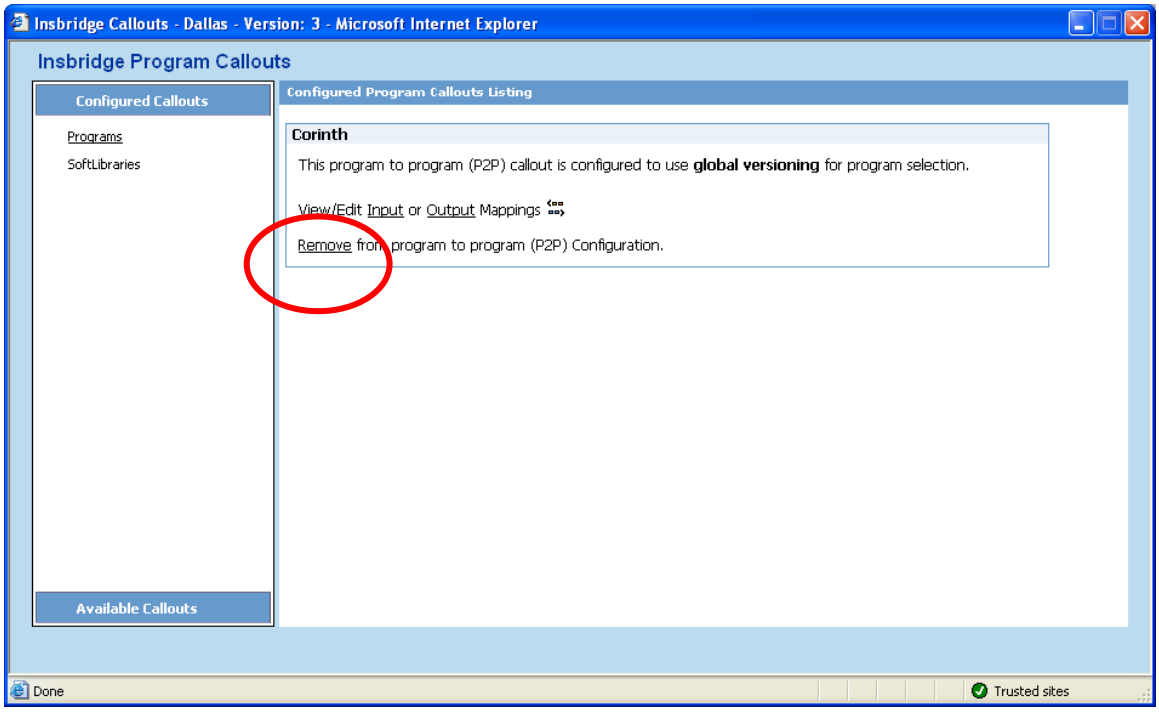


Figure 96 Deleting a Callout

2. Select the program or SoftLibrary you want to remove.

3. Click the **Remove** link. A warning message will be displayed. Select **OK** to remove the callout, click **Cancel** to return to the previous screen without deleting the callout.

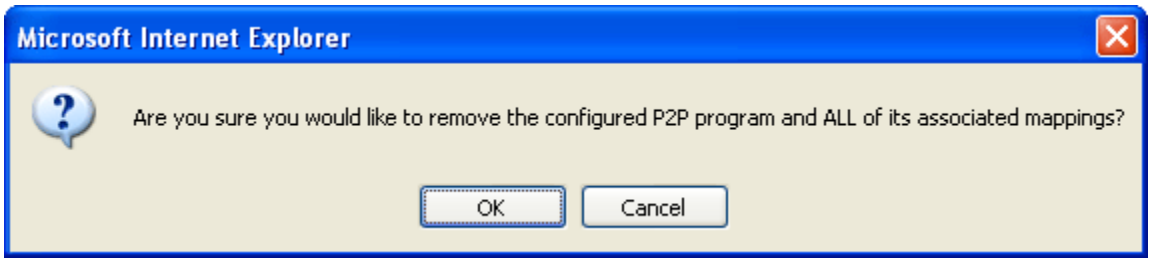


Figure 97 Deleting Callout Warning Message

Implementing Callouts

After creating a callout, you can select it when creating or editing steps for algorithms. Callouts are useful when you need to call an external data provider, such as the motor vehicle office, replacement costs calculators or credit reports. For example, you can place a callout in an algorithm so that the call is placed only after certain criteria have been met. This assures that the call is made against a risk that is more likely to qualify instead of a risk that may not meet the requirements.

You can also use a callout to access an internal database or internal process. Some insurers have central repository of data or applications that are shared company wide. Instead of loading this information into RateManager, a callout can be made from RateManager to obtain the information.

Callouts will be listed under Functions – Program Callouts or Functions – Library Callouts. Choose the type of callout you want. The available programs or SoftLibraries will be populated underneath. Select the callout you want.

For subline specific callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made.

Callout selections will be available under the subline they were created in.

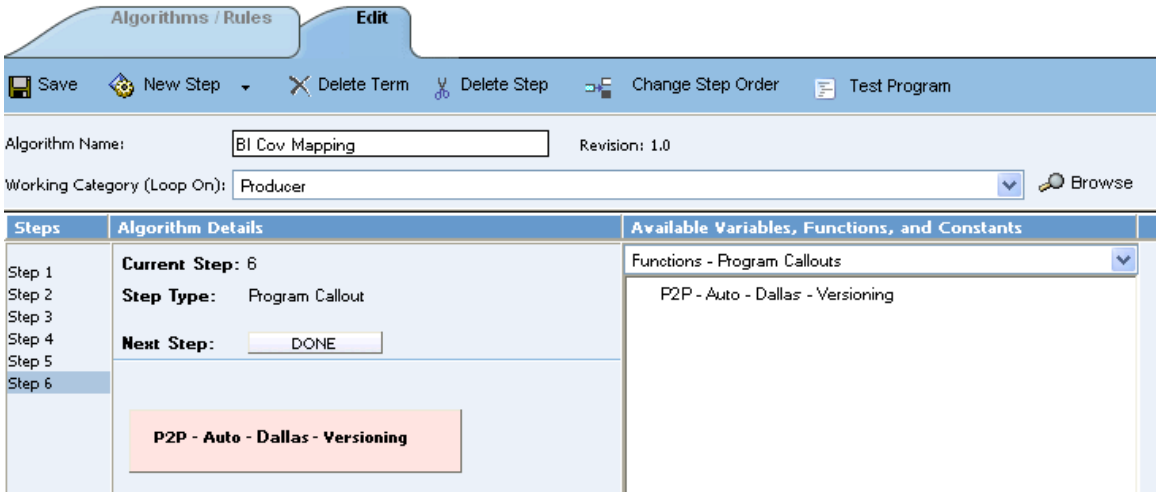


Figure 98 Implementing a Callout

Reconcile

The Reconcile option allows you to reconcile one program version against another. For example, when a new template is imported into a subline, you can check the new template against an existing template to see what the differences are. The differences that will be recognized are additions and changes to existing mapped and calculated variables and algorithms. No deletions will be noted. Sequencing, result mapping and driver assignments will not be compared.

The first program version you chose will act as the “base” version. This version is static. The second version will be compared to the first one. Any additions or changes will be against the second version. As the versions reconcile, you may accept or reject differences as you want. The acceptance or rejections will be placed on the second program version you choose. No alterations will be made to the first version.

This option is available to all unlocked programs and will be displayed when 2 or more versions of the program are listed. Program versions must be packaged. Locked versions cannot be reconciled.

If you want to compare template or imported versions, make sure the versions have both been brought into the subline and are packaged. If a version you want is not in the subline, please return to library to apply or to import.

NOTE	Use the Program Version Report to compare two versions of a program in your default subline.

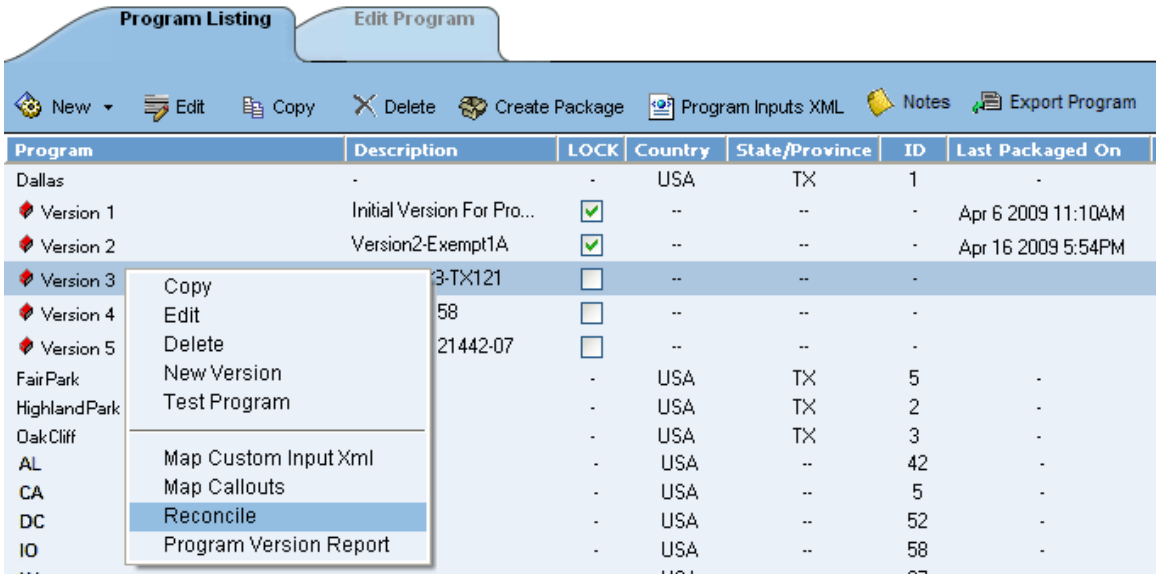


Figure 99 Selecting the First Version for Reconciliation

1. Begin by selecting the base version. This version will be the standard that the other version is compared against. No changes will be made to this version.

2. Right click and select **Reconcile** from the menu. A separate screen will be displayed.

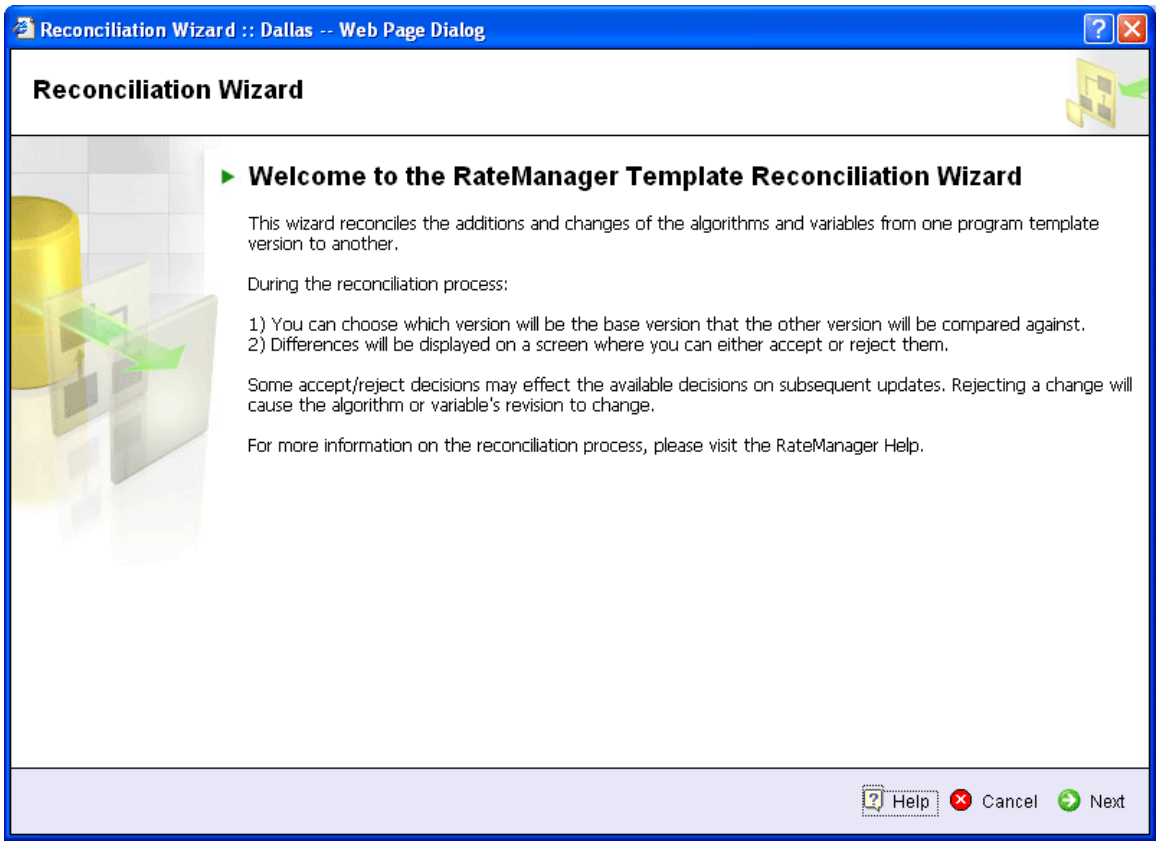


Figure 100 Reconciliation Wizard

3. Click **Next** to continue. If this is not the screen you need, click Cancel to close the wizard and return to the program screen.

NOTE	The program name will be listed at the top of the window.

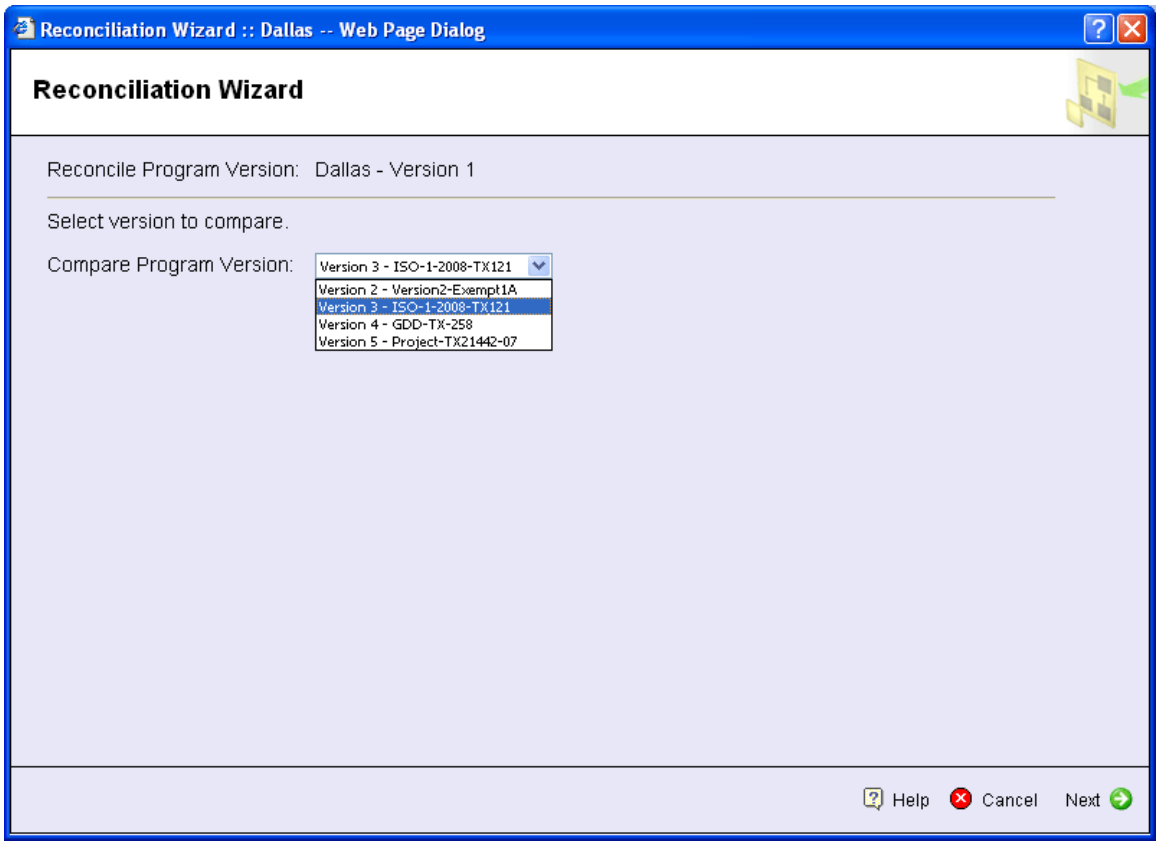


Figure 101 Selecting a Version for Comparison

4. **Select the version** you want to compare against the base. This can be a newer version of the program or it can be an older version. This version will have differences noted. If you reject a change, this version will be updated to reflect your refusal. For example, if the comparison version has three new variables added, you can choose to not keep those additions.

   It is automatically assumed that changes will be accepted. If you want to accept the changes, you do not need to check anything.

5. Click **Next** to continue. If this is not the screen you need, click Cancel to close the wizard and return to the program screen.

   The reconciliation will begin.

NOTE	If you reject changes and later find you want these changes reinstated, you can return to the library screen and re-import the template. It will come into the subline as the next available version number.

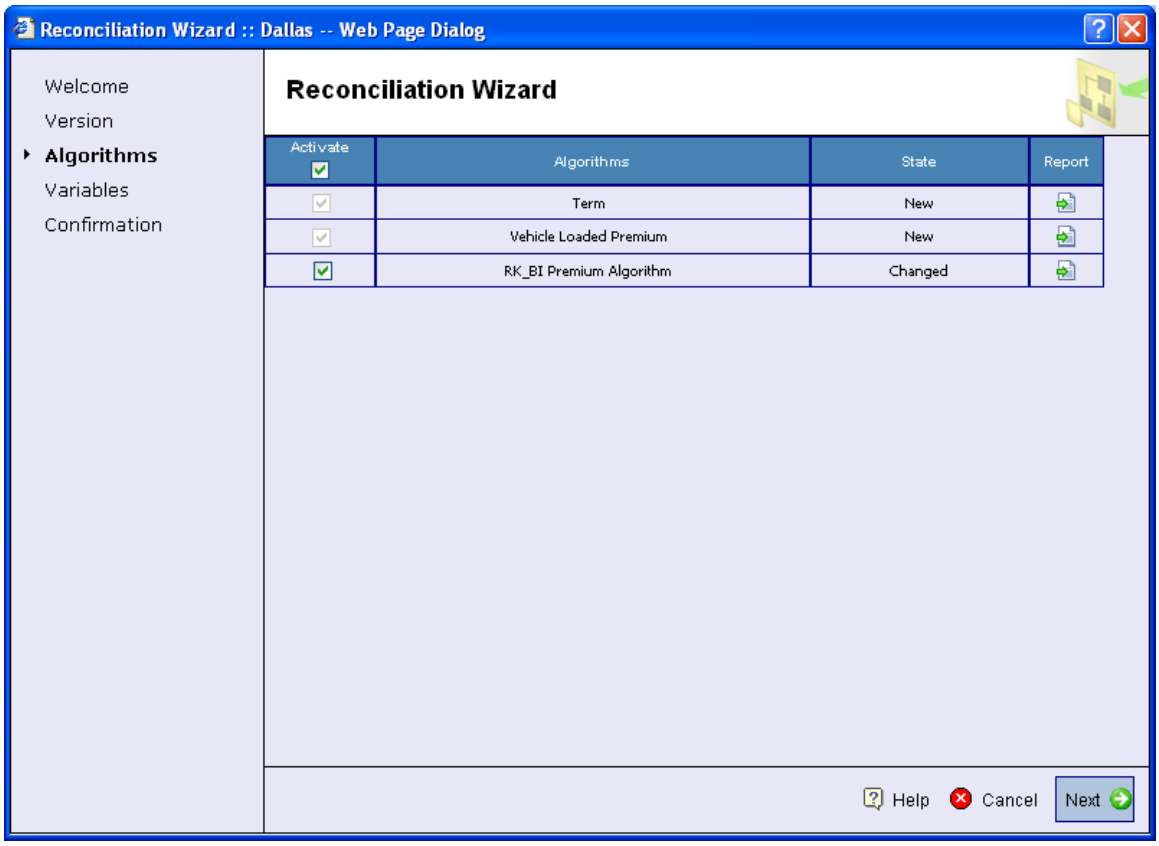


Figure 102 Algorithm Reconciliation

6. Algorithms are done first. If there are any new or changed algorithms, they will be displayed in the list. Algorithms that are grayed out are new and will automatically be included. To reject any changed algorithms, uncheck the **Activate** box in front of the algorithm that you do not want to accept. You can reject one or all changed algorithms. To reject all, uncheck the Activate box at the top of the screen. This will reject all changes.

   If algorithms do not have any changes or additions, the screen will display a “No algorithms to process. Continue to next step” message. There will not be a checkmark in the activate box or any reports to view.

7. When you are finished, click **Next** to go to the next screen.

NOTE	At any time, if you mistakenly reject a change you can click Cancel to cancel out of the reconciliation. No rejections will be made until the final screen. Once Finished is clicked, rejections will be permanent.

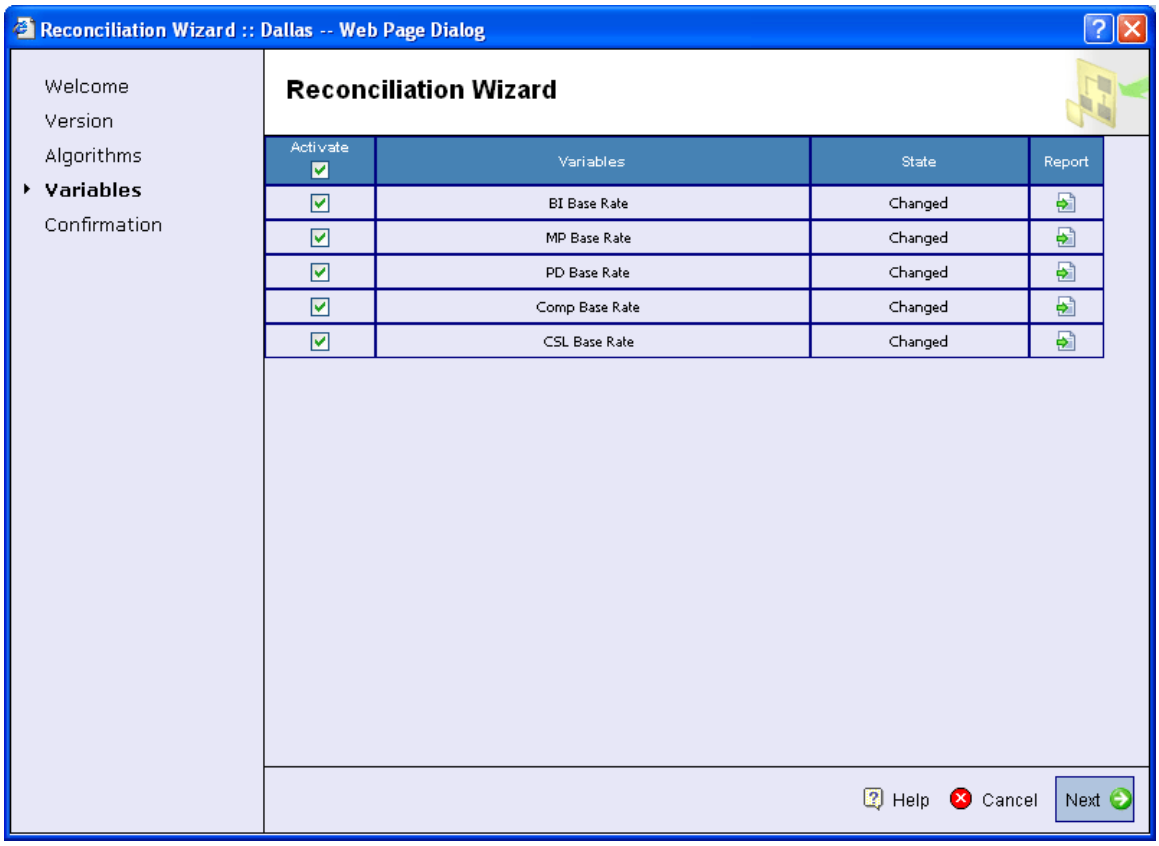


Figure 103 Variable Reconciliation

8. Variables are done next. If there are any new or changed variables, they will be displayed in the list. To reject the new or changed variables, uncheck the **Activate** box in front of the variable that you do not want to accept. You can reject one or all changed or added variables. To reject all, uncheck the Activate box at the top of the screen. This will reject all changes and additions.

   If you reject a change on the algorithm screen, the variables involved will be listed here. If you reject a change or addition, the system will re-evaluate the relationships between the variable and the other variables or algorithms where it was used. Any other variables that are affected by this rejection will be listed. The screen will refresh with the next level of variables in the relationship. They will be grayed out. Click **Next** to continue until all levels have been displayed.

   If variables do not have any changes or additions, the screen will display a “No variables to process. Continue to next step” message. There will not be a checkmark in the activate box or any reports to view.

9. When you are finished, click **Next** to go to the next screen.

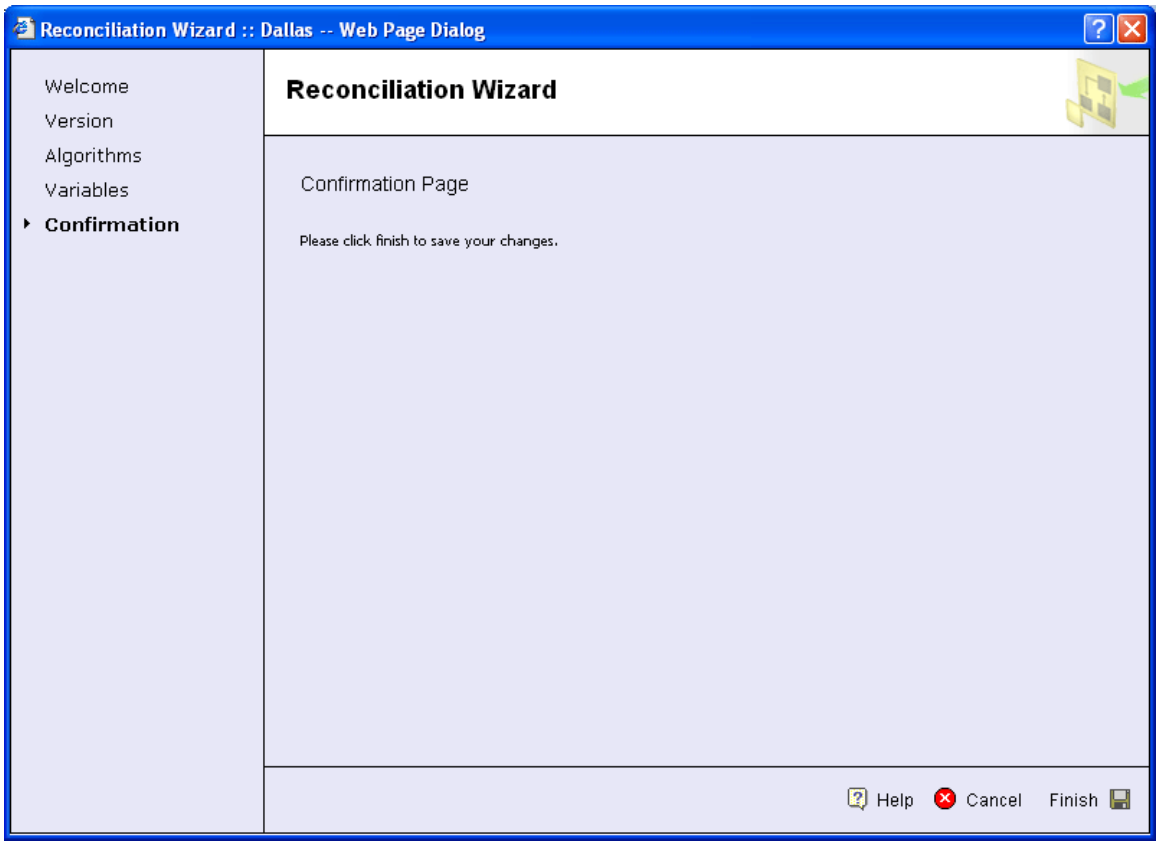


Figure 104 Reconcile Wizard Finish

10. On the Confirmation page, click **Finish** to accept or reject the changes and additions.

    If you are not sure that you want to make any changes, click Cancel to exit the wizard without making any changes.

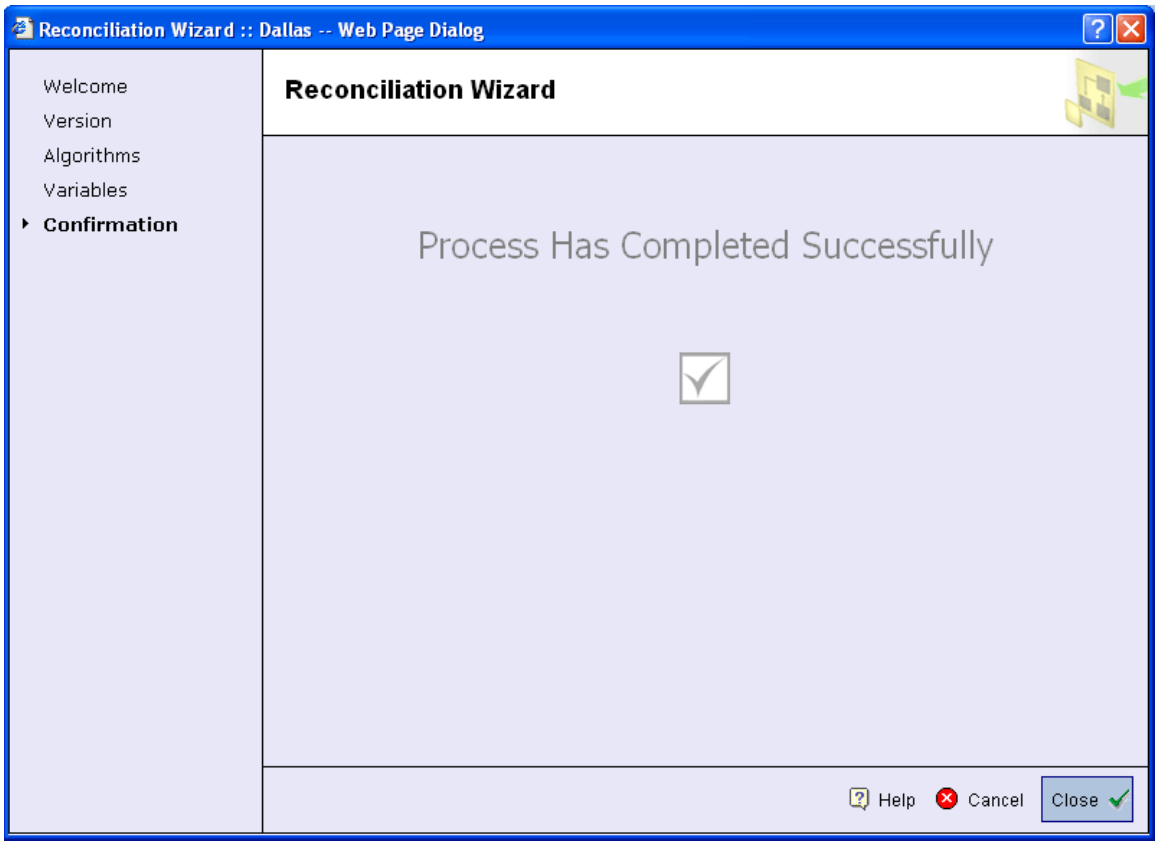


Figure 105 Successful Reconciliation

A confirmation screen will be displayed when the reconciliation is complete. Click **Close** to close the reconciliation.

If you have made any rejections to the changes found in the version you compared, the version will now reflect those changes.

Viewing Reports

To view the details of the changes or additions, click the report icon at the end of the row. A separate screen will be displayed with the details of the algorithm or variable.

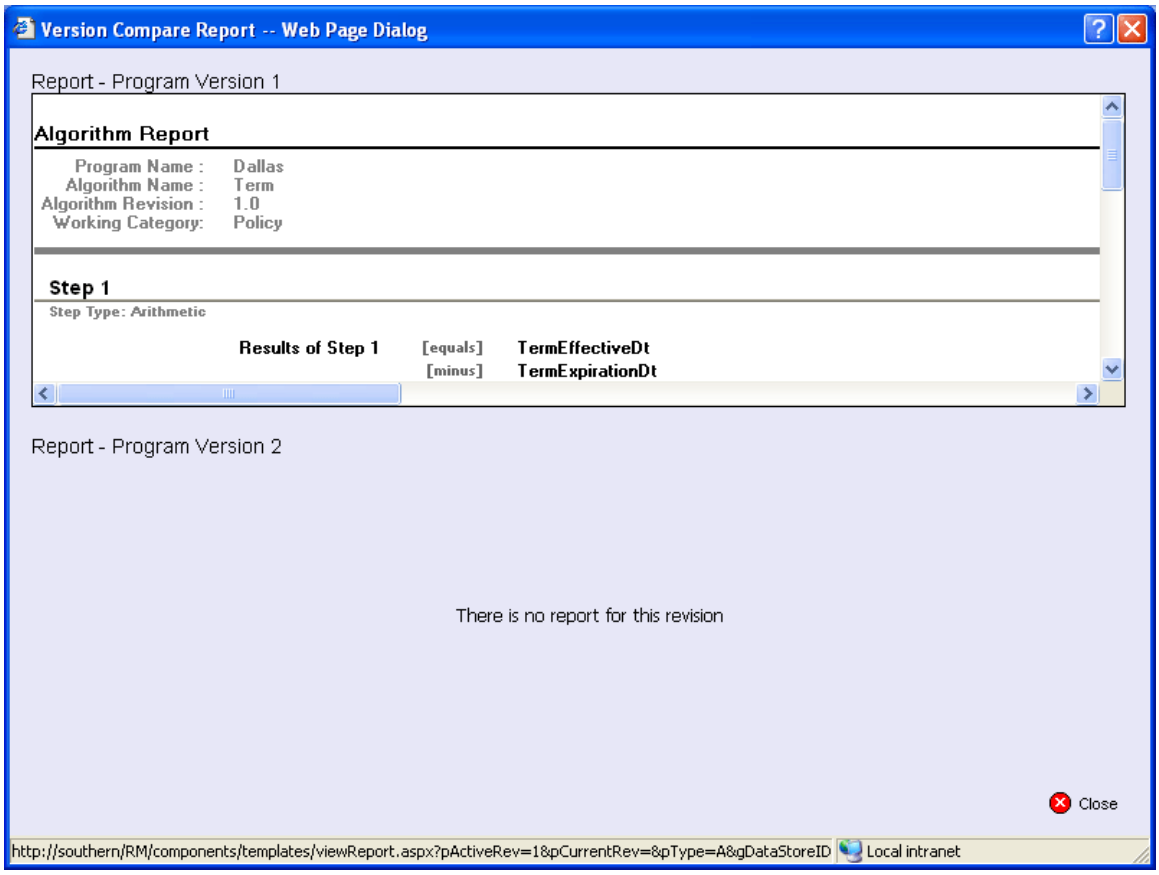


Figure 106 Detailed Report of Changes or Additions

No action can be taken from this screen. If you want to reject the changes, close the screen to return to the previous screen.

Program Difference and Program Version Reports

There are two reports that can be created from the Program Listing screen:

Program Difference Report
Program Version Report

Program Difference Report

Program Difference Report compares two versions or packages from the same program and shows the differences between the two. When running a Program Difference Report:

- The versions and/or packages are from the same program. You will not be allowed to compare version 1 from program 1 to version 2 from program 2.
- If comparing two versions, the versions must be different. You cannot compare version 1 to version 1.
- Versions are current. The version you select will be the version currently in the system.
- Versions can be compared to a package. The package and the version can be from the same version. You can compare a version 1 package to the current version 1.
- Packages must be created in RateManager 3.12. Lower versions of RateManager will not have this feature.
- Packages can be compared either to another package or to a current version.
- If comparing two packages, the packages must be different.
- Either local or full packages can be used.
- If the option to select a package is grayed out, you have not created the package in RateManager 3.12. If you want to compare a package, please exit the report and create either a local or full package.

The differences that will be recognized are:

- Elements that are used in one version or package but not used in the other.
- Changes to categories, inputs, variables, algorithms, sequences and result groups.

The comparisons are against elements that are used in the version or package. For example, if version 1 used revision 1 of an element and version 2 used revision 2, then the report would list that the element was used in both versions but with different revisions. Elements that are not used will not be listed on the report. For example, if an element was deleted and is no longer used by either version, the difference will not be noted.

This option is available on all programs in all sublines. To create a Program Difference Report, you must have either two versions, or one version and one package. If you have one version and no package, you will not be able to create a Program Difference Report.

Reports will be displayed in the Insbridge Document Viewer. Reports can be saved to your local drive or network or printed. No editing can be done on the Insbridge Document Viewer.

NOTE	*OBI Publisher must be installed and running in order for Program and Program Version Reports to be displayed. If you receive an OBI Publisher error, please contact your system administrator.*

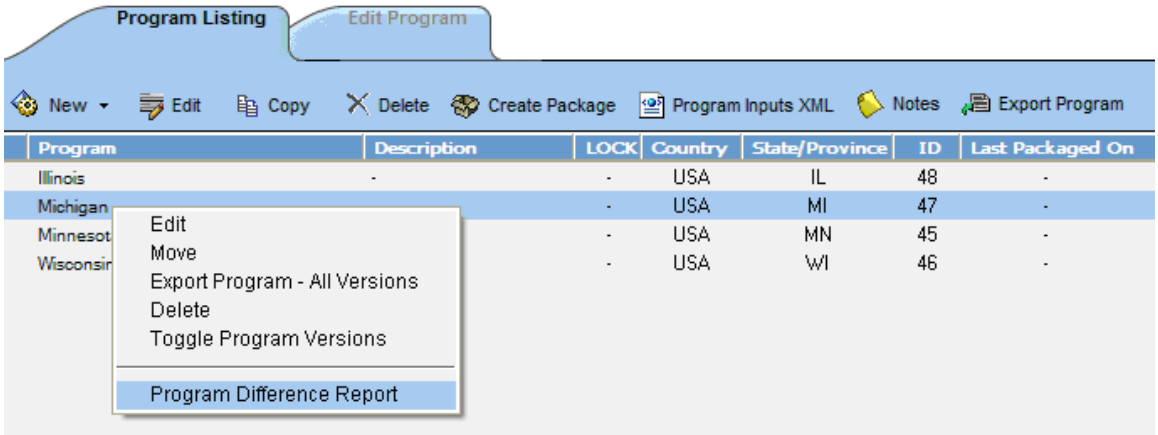


Figure 107 Program Difference Report

Running a Program Difference Report:

1. From the Program Listing screen, right click on the program where you want to run a Program Difference Report.

2. Select **Program Difference Report** from the right click menu. A wizard will be displayed.

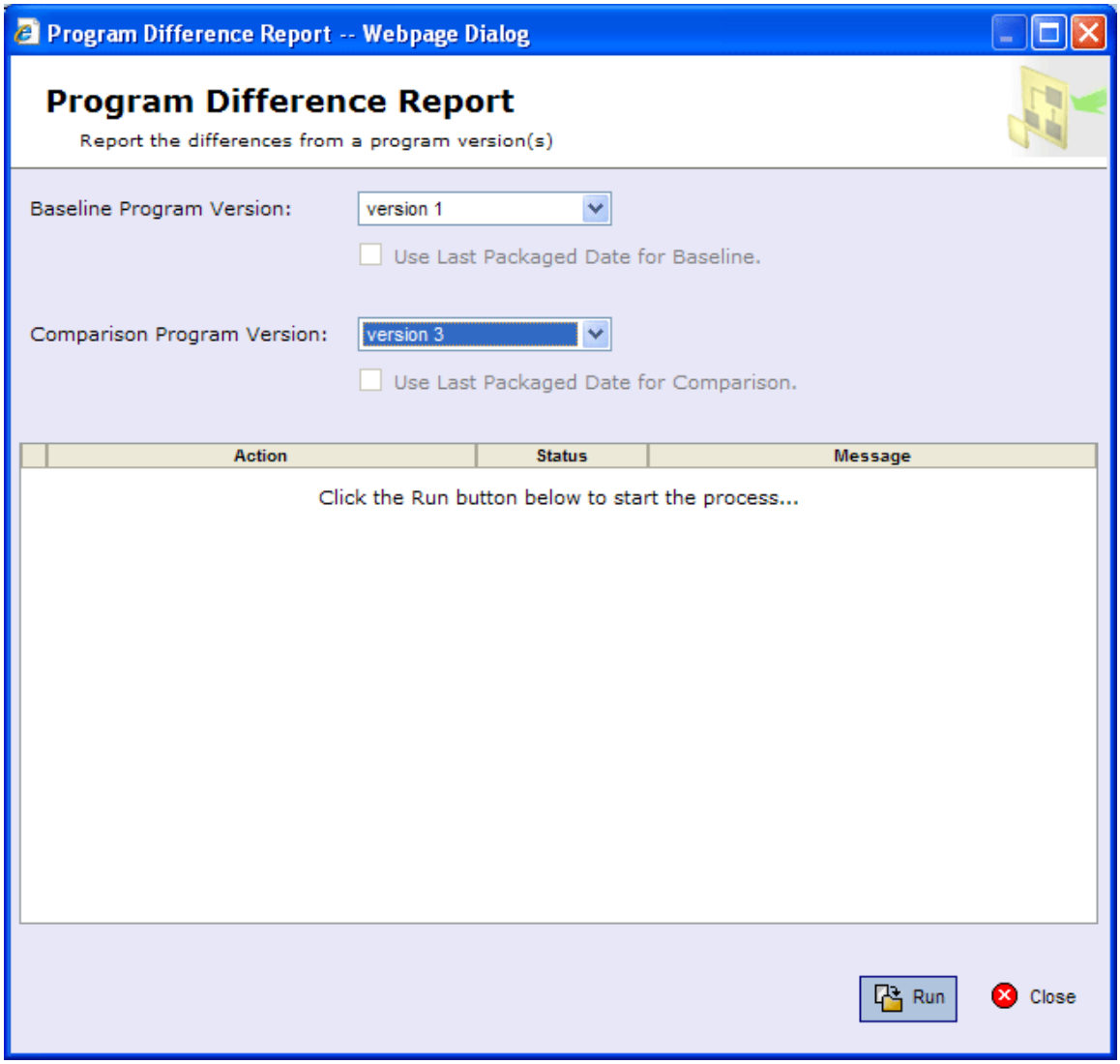


Figure 108 Program Difference Report Wizard Select Screen

3. Select the **Baseline Program Version**. All versions will be listed. This version will be the standard that the other version is compared against.

4. If the selected version has a package created in RateManager 3.12, you will have the option to check if you want to **use the last package** for this version. If the option is grayed out, no package created in RateManager 3.12 exists.

5. Select the **Comparison Program Version**. All versions will be listed. This can be any other version in the program, either newer or older.

6. If the selected version has a package created in RateManager 3.12, you will have the option to check if you want to **use the last package** for this version. If the option is grayed out, no package created in RateManager 3.12 exists.

7. Click **Run** to start the report. The progress will be displayed as the report runs.

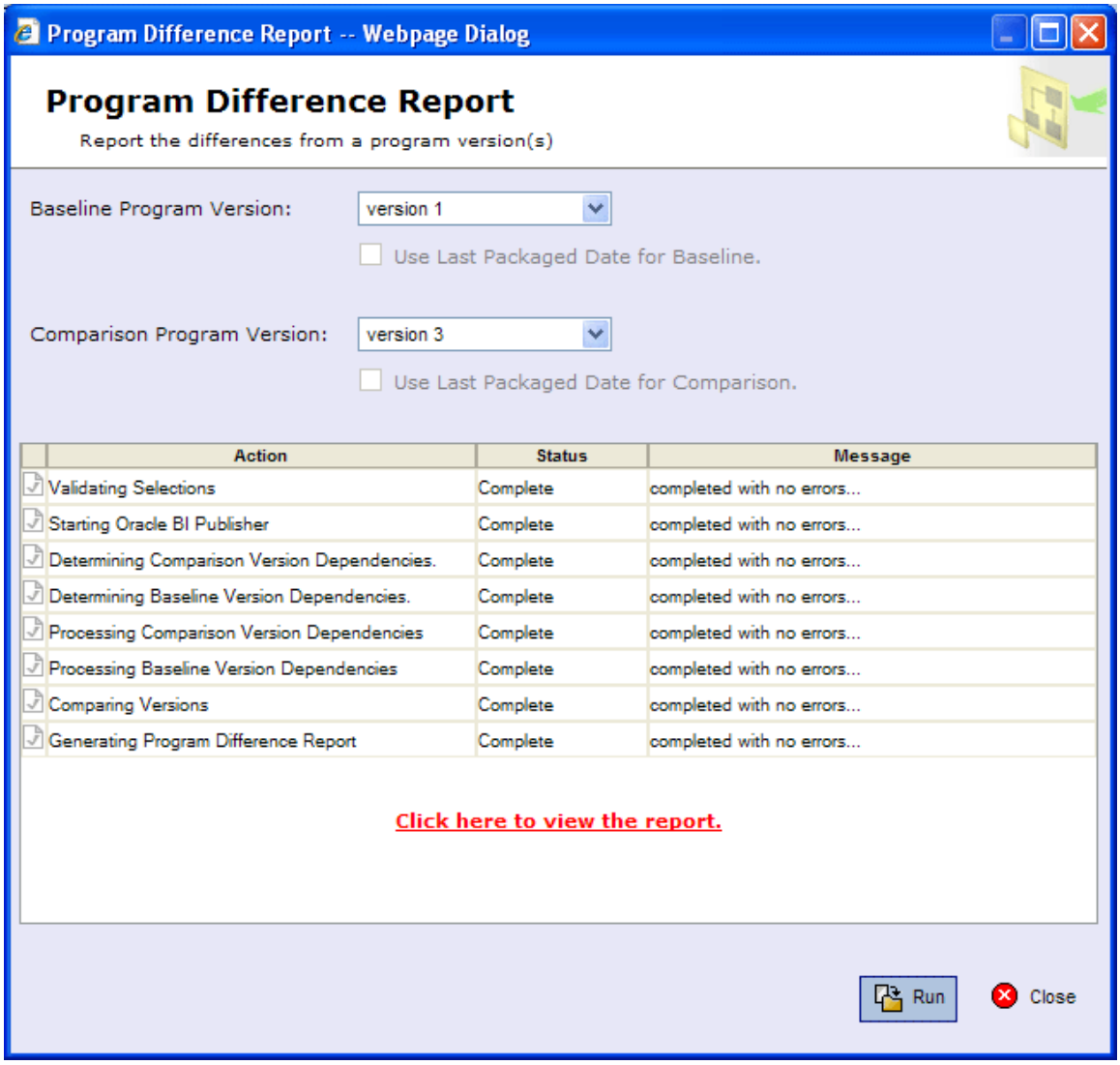


Figure 109 Completed Program Difference Report Wizard

8. Click on the "**Click here to view the report**" link. The report will be displayed in the Insbridge Document Viewer.

   If any errors occurred while running the report or displaying the report, please contact your system administrator.

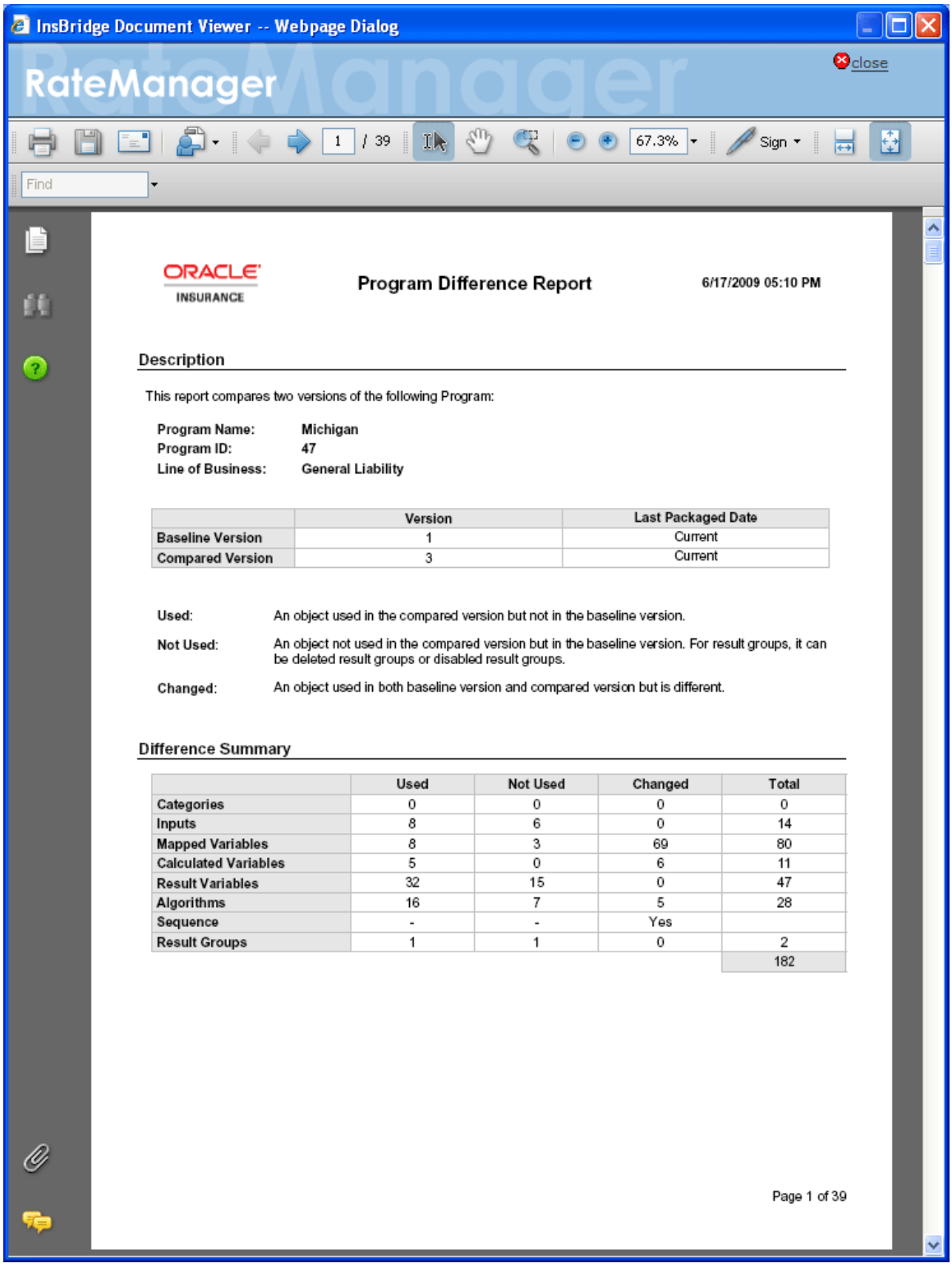


Figure 110 Program Difference Report

Reports will be displayed in the Insbridge Document Viewer. These documents are read-only. Reports can be saved to your local hard drive or network or printed. No editing can be done on the Insbridge Document Viewer.

NOTE	When you do a “Save As” from the Insbridge Document Viewer, you should rename the file. By default, when you go to save a file in the Insbridge Document Viewer, everything will be named “InsbridgeDocument”. It is recommended that you re-name the file.

Report Details

The report will have a description at the top, identifying the program, program ID and LOB. The Baseline and Compared versions will be listed next. If the Last Packaged Date is **Current**, the program version was used. If there is a date listed, the last package for this version was used.

Definitions

- **Used:** an element that is used in one version but not in the other version. Used elements will be listed underneath the version where they are found.
- **Not Used:** an object that is not used in one version but is in the other version. Not Used elements are represented by blank fields underneath the version where they are not found.
- **Changed:** an element that is used in both the baseline version and the compared version but has been changed in some way. Changes will be displayed below the Not Used//Used section.

The following elements will be shown in Used /Not Used section if they meet Used/Not Used criteria:

- **Inputs**
- **Categories**
- **Global Result Variables**
- **Mapped Variables**
- **Calculated Variables**
- **Algorithms:** if the name is different, it will show in the Not Used/Used section.
- **Result Groups:** deleted and disabled result groups will be counted as Not Used.

The following objects will be shown in Changed section if any of the elements listed changes:

- **Inputs:** Data Type or Category changes.
- **Categories:** Parent Category changes.
- **Global Result Variables:** Data Type or Category changes.
- **Mapped Variables:** Data Type, Category, Default Value, Qualifiers or Data changes. Data changes will list the dates of the last time the data was modified. The first date is for the baseline and the second is for the comparison. A change(s) was made some time between the two dates.
- **Calculated Variables:** Data Type, Category or Instructions changes.
- **Algorithms:** Category or Instructions changes. The step details will be listed out.
- **Result Groups:** The combination of Description and Result_ID changes or Category or Enabled changes.
- **Sequence:** The order of Algorithms changes or one or more algorithm(s) used/not used.

Only one report can be displayed in the Insbridge Document Viewer. You must close out the Insbridge Document Viewer to return to the report wizard. You can change the baseline or comparison program versions and run the report again. To return to RateManager, close the report wizard.

Program Version Report

A program version report provides the details of a program version.

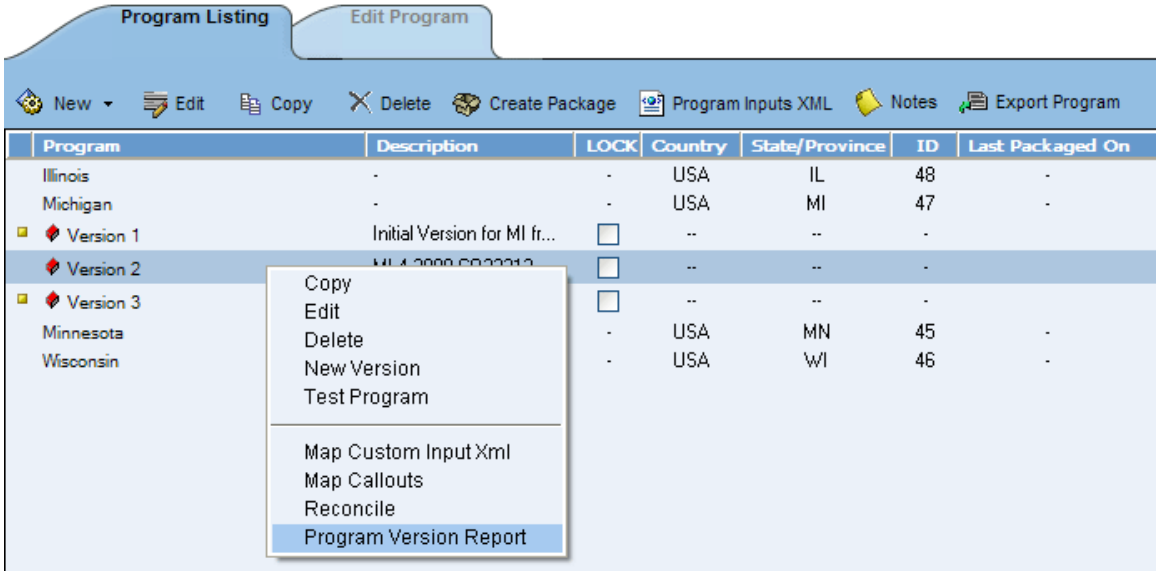


Figure 111 Program Version Report

1. From the Program Listing screen, right click on the program version where you want to run a Program Version Report.

2. Select **Program Version Report** from the right click menu. The Insbridge Document Viewer will be displayed. Your report will be generated in a moment.

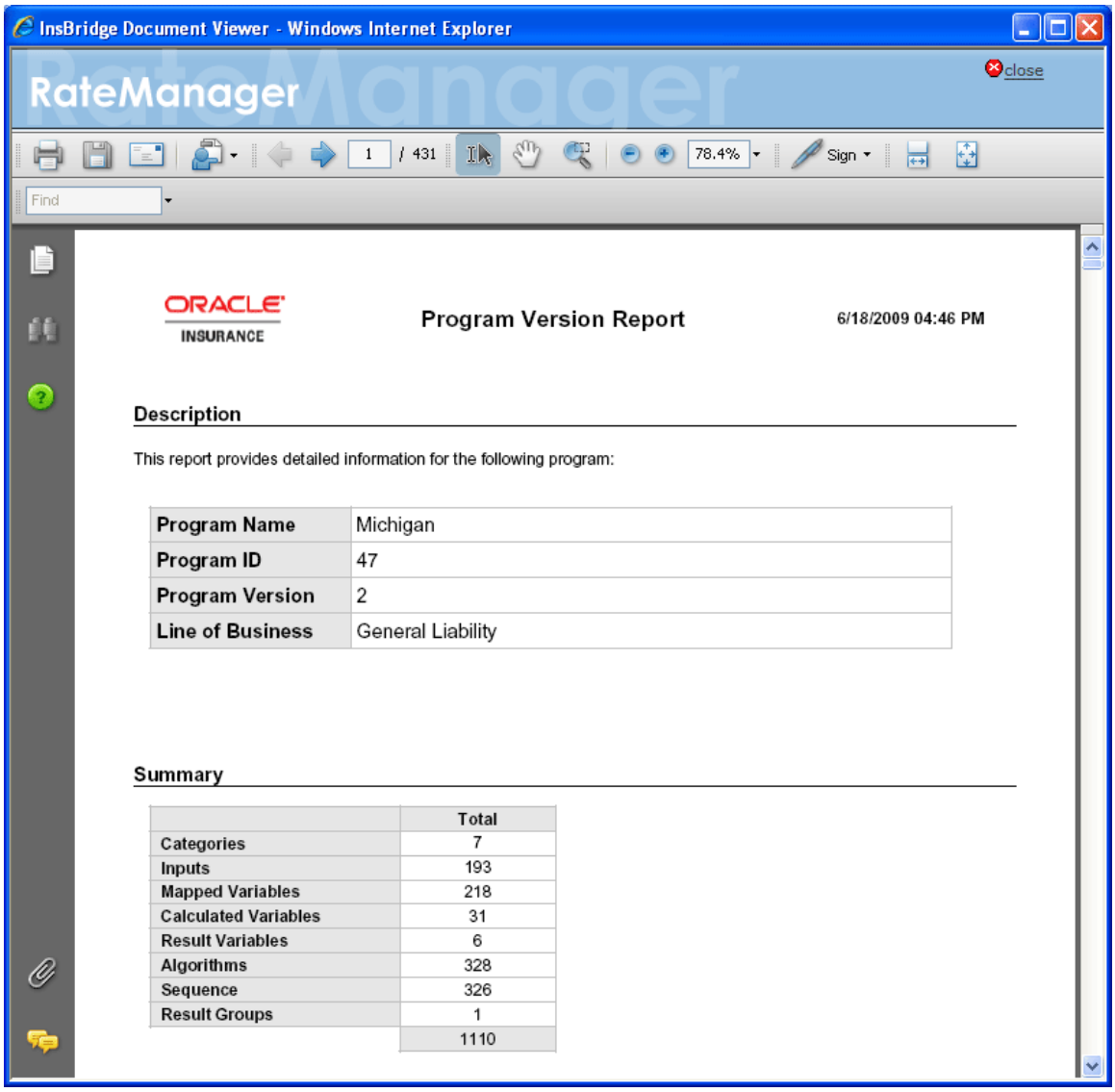


Figure 112 Program Version Report

Reports will be displayed in the Insbridge Document Viewer. These documents are read-only. Reports can be saved to your local hard drive or network or printed. No editing can be done on the Insbridge Document Viewer.

NOTE	When you do a “Save As” from the Insbridge Document Viewer, you should rename the file. By default, when you go to save a file in the Insbridge Document Viewer, everything will be named “InsbridgeDocument”. It is recommended that you re-name the file.

Report Details

The report will have a description at the top, identifying the program, program ID, program version and LOB. The Summary list will be next. The Summary will list out the total number of elements found in the program version. The pages following will detail all of the elements.

6

Introduction to Working Categories

The category concept is central to program loading in RateManager. Categories define inputs, variables, algorithms and the overall structure of a program.

A category is a group of information that is specific to an item. For example, an auto policy would have categories of Policy, Driver and Vehicle. A home policy would have a Policy and Dwelling category.

When categories are defined in RateManager, their relationship to existing categories is also defined. In our auto example, we would define Driver and Vehicle as belonging to Policy. In other words, Policy is the parent category of the Driver and Vehicle categories.

When variables and algorithms are created within RateManager, they are always assigned a category. The purpose of the category is to define the number of iterations the variable or algorithm should run. In the auto example, a Driver level category variable would run once for every driver on the policy. In the home example, a Dwelling level variable would run once for every dwelling on the policy.

Categories that are locked cannot be edited or deleted. Locked categories will have a lock icon.

NOTE	*For the purposes of this manual, a category will be shown like this: Category*

NOTE	*The Policy category (XML ID 0) always exists. It cannot be edited or deleted.*

NOTE	*In the auto line of business, your initial working category options are Policy, Driver, Vehicle and Driver-Vehicle. To create a variable that used both driver and vehicle inputs, you would need to define this variable in a Driver-Vehicle working category. The Driver, Vehicle and Driver-Vehicle categories cannot be deleted.*

When to Use a Category

Use a category to group a set of inputs together, so that the set will run for every instance of the group. For example, in calculating Driver Accident Points with an input of ViolationCode, you need to run a variable for every instance of ViolationCode for every driver. In this case, you could make a category of Violations whose parent category is Driver. In the Violations category, you would create an input of ViolationCode. When you create a variable like Accident Type, which is based on ViolationCode, the rating engine would look up an Accident Type for each ViolationCode passed into the system.

The following excerpt from an input file would represent a single driver with two accidents:

```
<ci="1" desc="Driver">
   <mi="23" d="BirthDate" v="09/13/1980"/>
   <mi="25" d="Gender" v="M"/>
   <ci="6" desc="Violations">
      <mi="102" d="ViolationCode" v="12"/>
   </c>
   <ci="6" desc="Violations">
     <mi="102" desc="ViolationCode" v="34"/>
   </c>
</c>
```

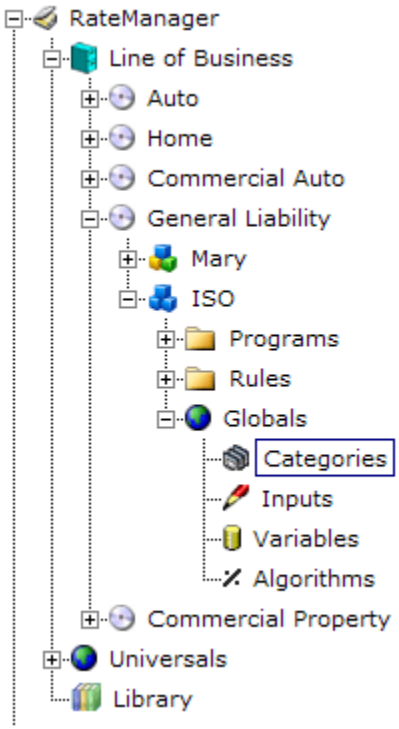
Category Listing Screen

The category listing shows all categories that have been created for a subline. In addition, it shows the XML ID and parent category for the categories. It also allows you to:

- Create a New Category
- Edit a Category
- Delete a Category
- View, copy or print the Line Inputs XML – See Line Inputs XML
- View History
- Create, edit and delete Notes – See Notes.

Navigate to the Category Listing Screen

1. From the menu tree, select the line of business, the subline you want, click **Globals** to expand it and then click **Categories.**



2. This will open the **Input Categories Listing**.

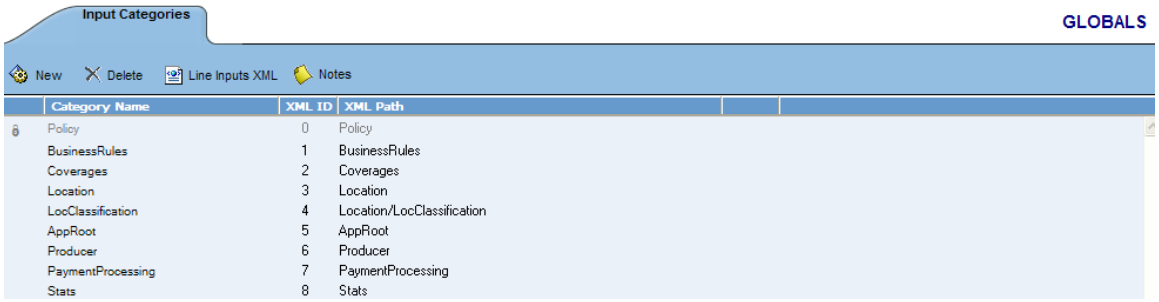


Figure 113 Input Categories Listing

Navigation Bar

New: Begins the process of creating a new category.

Delete: Deletes the selected category.

Line Inputs XML: View XML for the Line Input.

Notes: Lets you add, edit or delete notes for the category.

Column Sorting: You can sort categories by individual column headers. The default view is numerically (lowest to highest) by XML ID. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want. Sorting does not filter results. It only rearranges the order in which they are displayed.

Category Listing

Category Name: Lists the name of the category.

XML ID: The number RateManager uses to distinguish between categories when rating. This number is automatically assigned by RateManager at the time of creation. XML ID numbers cannot be changed.

XML Path: Shows the parent category of the category. Some categories, such as Producer in Figure 113, do not have a parent category. Other categories, such as LocClassification in Figure 113, have a parent category. It is also possible for a category to have a parent category that also has a parent category.

NOTE	The category Policy cannot be edited or deleted. The XML ID for the Policy category is 0. In the Auto LOB, the categories Driver, Vehicle and Driver-Vehicle cannot be deleted or moved. The XML IDs for these categories cannot be changed and will always be the same regardless of RateManager version, subline or program version. The XML ID for the Driver category is 1, the Vehicle category is 2 and for the Driver-Vehicle category is 3. The Driver and Vehicle categories will allow for the name to be edited. The Driver-Vehicle category cannot have any other category underneath it. The Driver, Vehicle and Driver-Vehicle categories will always be a parent category.

Creating a New Category

RateManager automatically sets up a Policy category for each subline. For some sublines, RateManager will also set up additional categories. In auto, for example, RateManager automatically sets up the categories of Driver, Vehicle and Driver-Vehicle. The Driver-Vehicle category cannot have a category created underneath it. Additional categories can be created as needed.

To Create a New Category

1. Navigate to the **Category Listing** for the subline where you want to create a new category.

2. Click the New button. You also can highlight any existing category and right click. Select **New** from the menu.

3. A **New Category** popup box will be displayed.

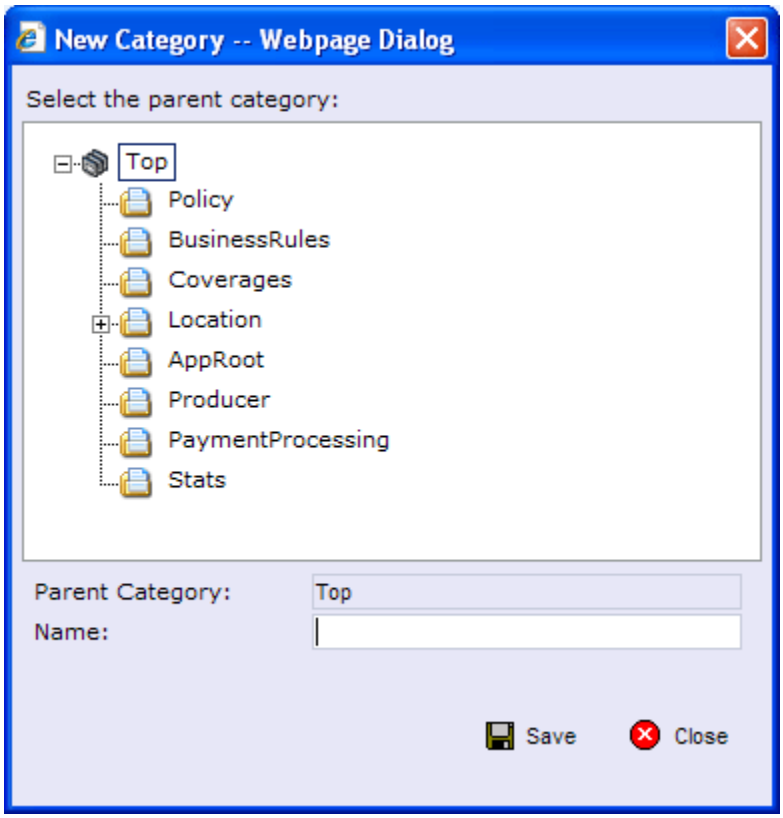


Figure 114 Creating New Category

4. Top is the top-level parent category. If no categories are displayed, the first category created must fall under Top. Once other categories have been created, you will be able to select the category pathway. The pathway will be displayed in the Parent Category field. On the tree view, the final destination where the new category will be placed will have a box around it.

5. Enter in a **Name**. Click Save to save your category. The screen will refresh and the new category will be displayed in the Categories screen.

NOTE	Oracle Insurance recommends that the Category Name not contain any spaces and that the Category Names be unique, regardless of the pathway.

NOTE	Once you have created a new category, it will be available from the working category drop down boxes in the variable and algorithm screens.

Editing a Category

Editing a category allows you to change the category's name or change the parent category.

Changing a parent category allows you to change the category location within the same subline. When you move a category, all associated subcategories are moved as well. There is no limit to the number of times a category can be moved. The Policy, Driver, Vehicle and Driver-Vehicle categories will always be a top level category and cannot be moved underneath another category. Moving is performed on the Edit Category window.

WARNING	***If you have already started creating your program, changing the parent category is not recommended.*** ***This is especially true for templates. Changing a category on an updated template may cause it to be rejected by the user who is trying to apply it.***

1. Navigate to the **Category Listing** for the subline that contains the category you want to edit.

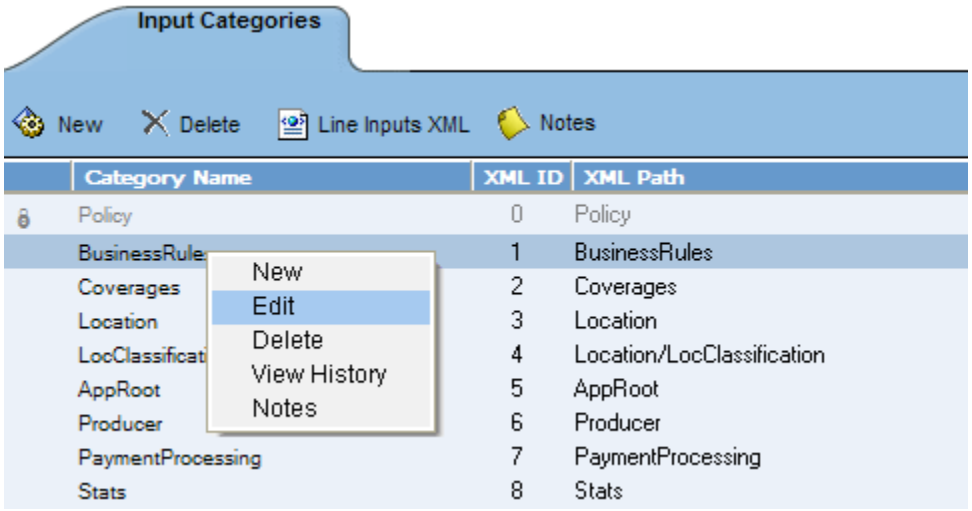


Figure 115 Edit Category Selection

2. Select the category you want to edit or move and either double-click it or right click it and select **Edit** from the popup menu.

3. The **Edit Category** popup box will be displayed.

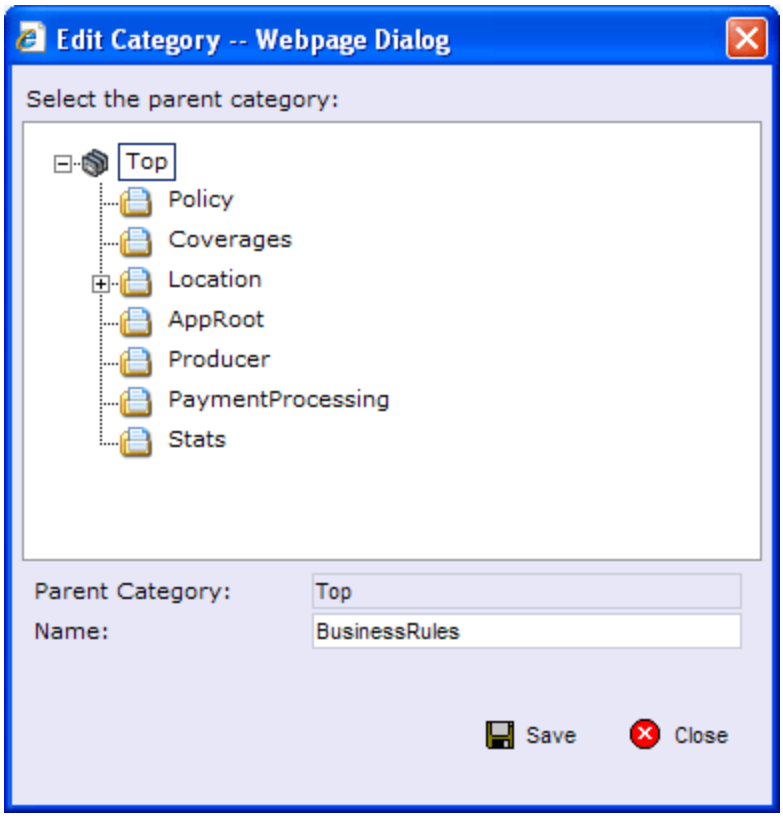


Figure 116 Editing a Category

4. To change file location, choose a new parent category. The folder you have selected to move will be displayed in the Name field but will not be displayed in the tree structure. Double click the folder where you want to move to. The Parent Category field will reflect the new path for the category.

5. Make any needed **Name** changes.

6. Click Save when you are finished to refresh the category listing.

Click Close to go back to the Category screen without saving changes.

NOTE	You cannot change the XML ID of a category. RateManager automatically assigns the XML ID when the category is created. Categories that are grayed out cannot be moved. Name changes may be allowed. Categories that are locked are not editable.

Deleting a Category

If you no longer require a category, you can delete it. When you delete a category, the reference to the XML ID also is deleted and will be available to be assigned to a new category.

In the Auto LOB, the categories Driver, Vehicle and Driver-Vehicle cannot be deleted.

1. Navigate to the Category Listing for the subline that contains the category you want to delete.

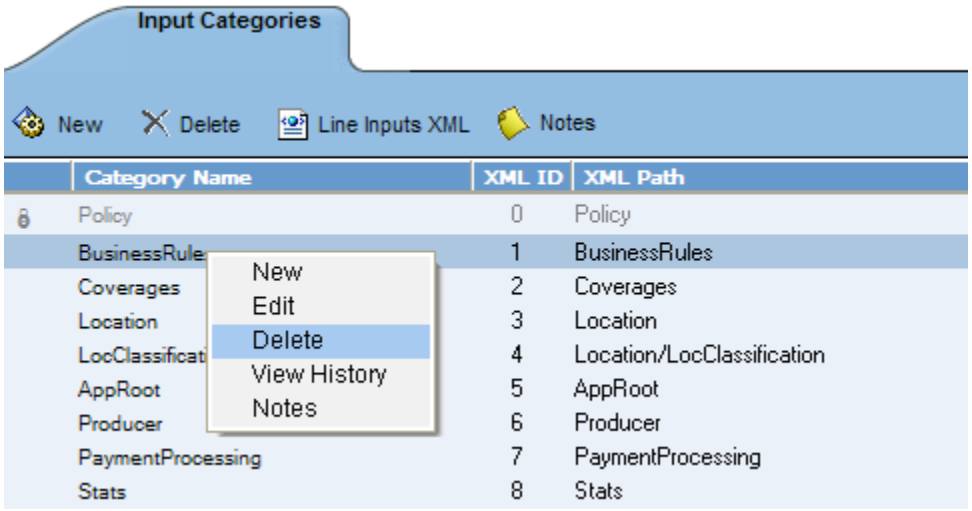


Figure 117 Deleting a Category

2. Select the category you want to delete and either click Delete or right click and select **Delete** from the popup menu.

3. The category will be deleted and the category listing will be refreshed. If the category is still being used by an element, you will receive an error message.

NOTE	Categories being used by an element cannot be deleted. Categories that are grayed out or have a lock icon cannot be deleted.

7

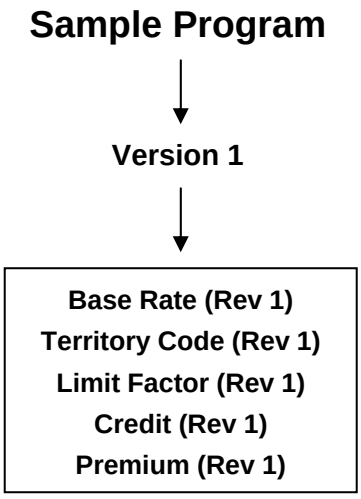
Introduction to Versioning

RateManager supports two levels of versioning to allow you to implement rate changes quickly and easily. These levels are:

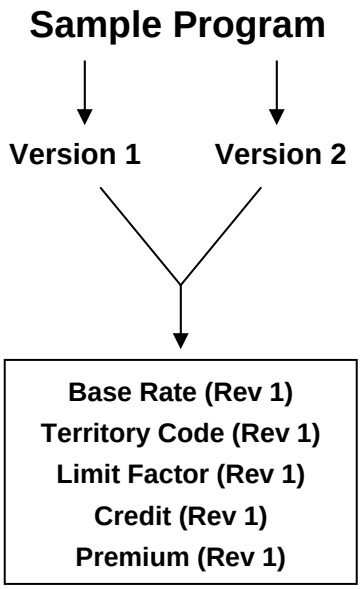
- **Program Versioning**
- **Program Element Revisions**

Program versions and element revisions can be performed on both standard programs and templates programs and are closely related. When a new version of a program is created, it is not a copy of the version it was based on. Instead, the new version is more like a pointer to the original version and all items that exist in that version.

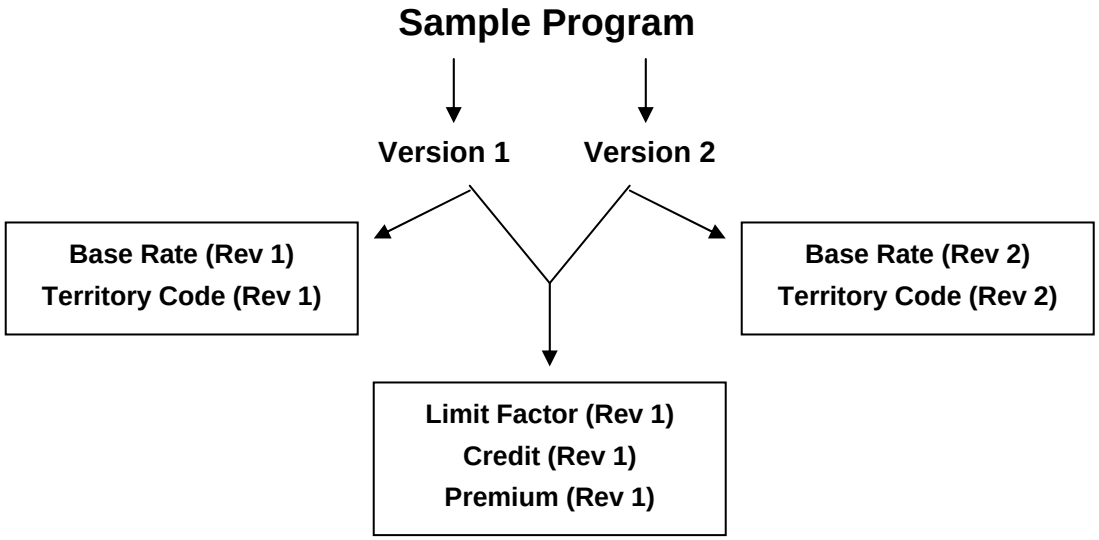
The picture below represents an initial program before any new versions have been created.



When a second version is created, it initially points to all the same variables and algorithms as the first version.



In order to load the rate change, you will create a second revision of all the variables and algorithms that change. In this example, if the Base Rate variable and the Territory Code variable change, you would make a second revision for both of variables. Version 1 would still use revision 1 of all variables. Version 2 would use revision 2 of the Base Rate variable and Territory Code variable, but would still use revision 1 of all the other variables and algorithms.



Program Versioning

Versioning can be handled at the program/product level. When a new version of a program is created it is initially a pointer to all elements in the last version of the program. When a change is made to an element in that version, it can be made version specific or applied to multiple versions.

Each program created in RateManager automatically starts at Version 1. Users have the ability to create a new version of a specific program at any time. Usually new program versions are created to correspond to a rate change. See Creating a New Program Version for more information.

Program Element Revisions

All elements of a program can be versioned individually. Below is an example of revisions for a specific variable, shown by using the **Show/Hide Revisions** option that is available by right clicking on a variable name.

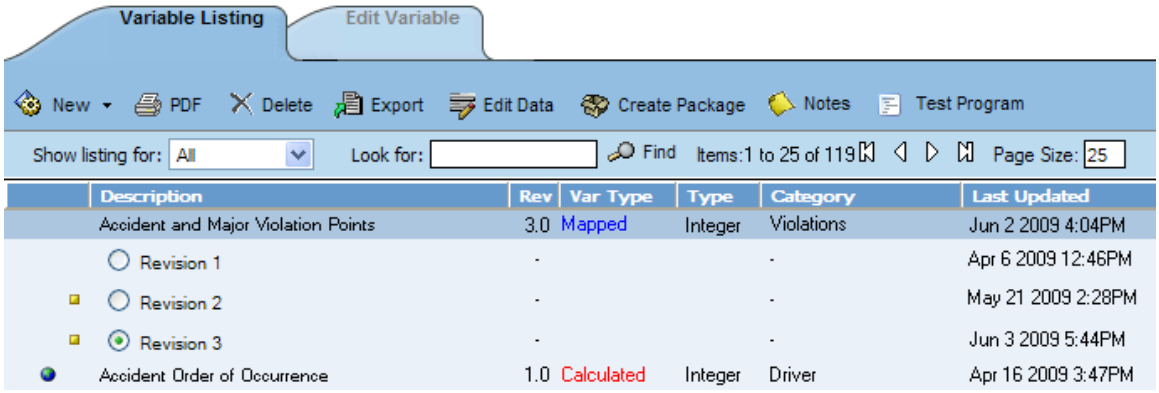


Figure 118 Program Element Revisions

If you wanted Accident and Major Violations Points to use Revision 3, you would select the radio button next to Revision 3.

For more information on program element revisions, see Creating a New Algorithm Revision.

NOTE	*All variables, algorithms, and underwriting rules can be versioned – including any global instances of these elements.*

SoftRater Automatic Version Selection

SoftRater can automatically determine what program version to use, based on the versioning criteria that were selected in RateManager. Your input XML should not specify a version, unless you want to override automatic versioning. Shown below is an example input file.

```
<rate rateId=”99” policyId=”10418124”>
   <heading>
  <program parent_id=”100” program_id=”28”>
    <m i=”119” n=”EffectiveDate” v=”02012009”/>
  </program>
  <program parent_id=”100” program_id=”29”>
    <m i=”119” n=”EffectiveDate” v=”05012010”/>
  </program>
  <program parent_id=”200” program_id=”29” program_ver=”3”>
    <m i=”119” n=”EffectiveDate” v=”03012009”/>
  </program>
    </heading>
    <c i=”1” desc=”Vehicle”>
  <m i=”386” n=”VehicleId” v=”1”/>
  <m i=”182” n=”Model Year” v=”2006”/>
    </c>
    <c i=”2” desc=”Driver”>
  <m i=”367” n=”DriverNum” v=”1”/>
  <m i=”37” n=”Violations” v=”0”/>
    </c>
    <c i=”2” desc=”Driver”>
  <m i=”367” n=”DriverNum” v=”2”/>
  <m i=”37” n=”Violations” v=”0”/>
    </c>
</rate>
```

The above input XML calls 3 programs:

- The 1st program call is parent_id = 100, program_id = 28, with no specific version. When a version is not specified, automatic version selection is triggered. In this case, there is logic in Program 28 that will tell SoftRater the correct version based on the EffectiveDate.
- The 2nd program is identical in nature to the 1st, but it calls program_id 29 instead.
- The 3rd program call is parent_id = 200, program_id = 29, and program_ver = 3. In this case, automatic versioning is overridden with a specific version call.

To enable SoftRater to automatically select a version of a program to rate, follow these steps:

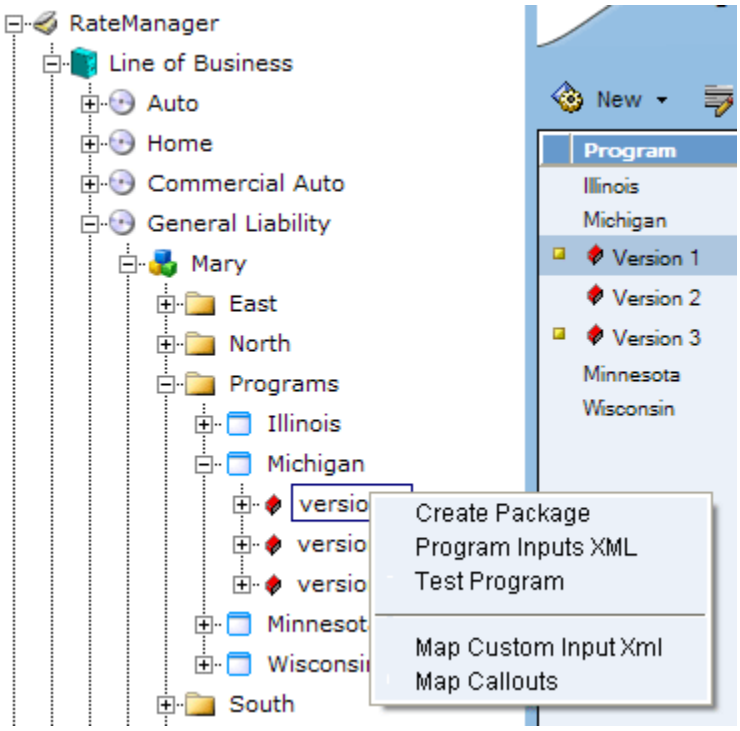
1. Select which Policy inputs will be used to select a program version – see Editing a Program.
2. Specify the input values to be used by each program version – see Editing a Program.

3. Create a Global Versioning Package.
4. Rate an input file without specifying a program version.

Right Click Menu Options

On any individual program version, a right click menu will be available. The selections are:

- **Create Package** – Allows you to create a package from this program version. See Creating a Global Versioning Package.
- **Program Inputs XML** – Clicking this option will bring up the XML screen for this program version. This screen allows you to view, print or copy the XML. See Program Inputs XML.
- **Test Program** – Opens the Test Case Editor, which allows you to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.
- **Map Custom Input XML** – Clicking this option will bring up the Input Variable Mapping screen for this program version. This screen allows you to enter, view, import or upload input mappings. See Introduction to Input and Output Mapping.
- **Map Callouts** – Clicking this option will bring up the Callout screen where you can select and map programs or SoftLibraries. See Callouts.



Selecting any option will pull up the popup screen for that option. This feature can be used at any time and does not require you to leave the screen you are currently working in.

8

Introduction to Variables

Variables are placeholders that get filled in during rating, based on inputs and other criteria. RateManager supports two types of variables:

- **Mapped Variables**
- **Calculated Variables**

Each variable type serves a distinct purpose and each has options and features that apply only to that variable type.

Mapped Variables:

- Create a Mapped Variable including:
- Masking
- Wildcards
- Interpolate
- Edit a Mapped Variable
- Creating and Editing Import Files
- Importing a Table
- Editing Data in a Table
- Exporting a Table
- Create a PDF of a Mapped Variable

Calculated Variables:

- Create a Calculated Variable
- Edit a Calculated Variable
- Create a Custom Value

Mapped and calculated variables share some common features.

- Copy a Variable
- Create a Variable Revision
- Changing the Active Revision of a Variable
- Delete a Variable
- Delete a Variable Revision
- Create a Package – See Introduction to Packaging
- Test a Program – See Introduction to Test Case Editor
- View Quick Report
- Display Where Used
- View Dependency Report
- View History
- Notes – See Notes

Variables, regardless of type, can be created by the user or brought in from a template. Variables that are user created will be open for editing, copying, creating new revisions and deletion if they are not locked. Variables that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New variables can be added to a template and new revisions can be created. These new variables will be open for editing, copying or deletion, unless the program version is locked.

Variable Listing Screen

The **Variable Listing Screen** shows all variables, either mapped or calculated, that have been created for a program. In addition, the **Variable Listing Screen** shows the revision number, variable type, data type and working category of the variables.

Navigate to the Variable Listing

1. From the menu tree, select the line of business, subline, folder, program and version that contains the variables you want to see and click **Variables**.

2. This will open the **Variable Listing**.

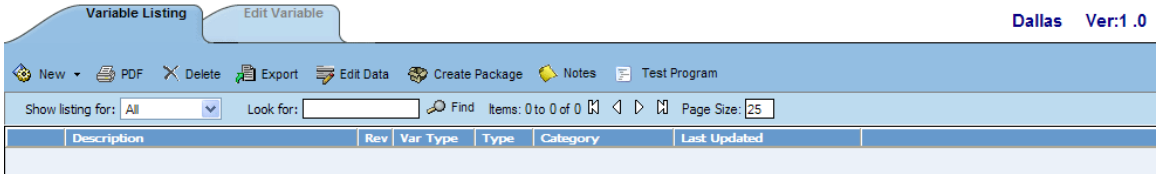


Figure 119 Variable Listing

Navigation Bar

Edit Variable Tab: Used to navigate to the edit variable screen for the currently selected variable. You also can double-click a variable to edit it. See Editing a Mapped Variable or Editing a Calculated Variable for more information.

New: Begins the process of creating a new variable, either mapped or calculated.

PDF: Generates a PDF of the data table for the currently selected mapped variable.

Delete: Removes the selected variable from the program. If the variable is being used in an algorithm, variable or result group, you will receive an error message.

Export: Allows the user to export the contents of the currently selected mapped variable, and any variables linked to it, to a tab-delimited file. See Exporting a Table for more information.

Edit Data: Shows the data table for the current mapped variable. The data table can be used for verification and quick editing purposes. Data can be changed and rows added or deleted from this screen. See Editing Data in a Table for more information.

Create Package: Packages the program for rating and testing. See Introduction to Packaging for more information.

Notes: Allows the user to enter, view or delete notes and to view or delete change controls. See Notes for more information.

Test Program: Opens the Test Case Editor, which allows you to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.

Show Listing For: Allows you to filter the type of variables shown.

- **All** will show all variables.
- **All Used** will show all variables that are currently being used in an algorithm, variable or result group.
- **Mapped Vars** will show all mapped variables.
- **Calc Vars** will show all calculated variables.

Look For: Allows you to narrow the list of variables. To do this, type in part or all of, the name you are looking for and click Find. To re-show all the variables, clear this box and select Find.

Page Settings: Allows you to customize the number of variables displayed per page and move back and forth between pages. Also displays the total number of variables that match the criteria in both the Show Listing For box and the Look For box.

	Move to the first page
	Move back one page
	Move forward one page
	Move to the last page

Column Sorting: You can sort variables by individual column headers. The default view is alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Variable Listing

A list of all variables in the program, sorted alphabetically. A icon indicates the variable is a global variable. See Creating a New Global Variable for more information.

Description: Name of the variable.

Rev: Shows which revision of the variable is used by the current program version.

Var Type: Shows whether the variable is a mapped or calculated variable. If a number in parenthesis follows the variable type, it indicates the total number of variables, including this one, that are linked together.

Type: Displays the data type of the variable, i.e. Integer, Decimal, Date or String.

Category: Displays the working category of the variable.

Last Updated: Time stamp of the last time the variable was saved. In the case of mapped variables, editing the data table will also update the time stamp.

Introduction to Mapped Variables

In RateManager, a mapped variable is a table based, or look-up variable. Any data that can be quantified in a table can be loaded into RateManager as a mapped variable. Common tables in a manual include territory codes, deductible factors and base rates.

Also, rating data, such as credits and surcharges, can be defined in a table. It is usually advantageous to have as much rating data in a table as possible. Tables can be maintained and updated relatively quickly.

Mapped variables can be template generated or created by you. Template generated mapped variables will be grayed out and locked. They are not open for editing but can be copied.

NOTE	*For the purposes of this manual, a mapped variable will be shown like this: Mapped Variable.*

Creating a Mapped Variable

When you create a new mapped variable, it gets created in all versions of a program. Mapped variables can be added to both standard and templates programs.

NOTE	There is no limit to the number of variables that can be created for a program.

Creating a Mapped Variable

1. Navigate to the **Variable Listing** screen for the program you want to create a new mapped variable for.

2. Select New from the menu bar and then select **Mapped Variable** for the type of variable you would like to create.

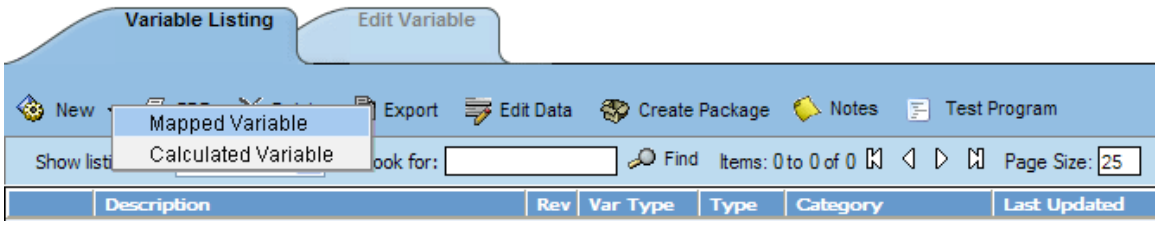


Figure 120 Creating a New Mapped Variable

3. This will open the **Edit Variable** screen for the new variable where you can enter or select the variable elements you need.

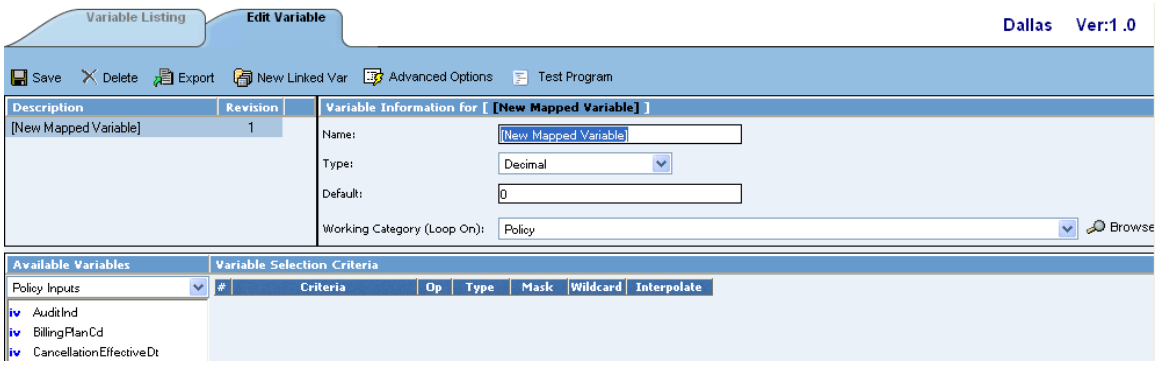


Figure 121 Editing a New Mapped Variable

Navigation Bar

Variable Listing Tab: Used to go back to the Variable Listing screen.

Save: Saves the mapped variable.

Delete: Either removes the selected criteria from the mapped variable or deletes the selected linked variable from the program. If the variable is still being used in the program, you will receive an error message.

Export: Allows the user to export the contents of the current mapped variable or linked variables to a tab-delimited file. See Exporting a Table for more information.

New Linked Var: Creates a new mapped variable that is based on the same criteria as the currently selected mapped variable. The new variable will be "linked" with the current mapped variable and data can be updated simultaneously.

Advanced Options: Allows you to change how RateManager handles fields that are NULLs/Wildcards. By default, RateManager attempts to make an exact match and in the absence of an exact match, RateManager will choose the row that has the most matches. Activate this option if you want RateManager to choose the first possible row, even if a better match exists later in the table.

NOTE	An advanced option is only available if at least one of the criteria has the wildcard option selected.

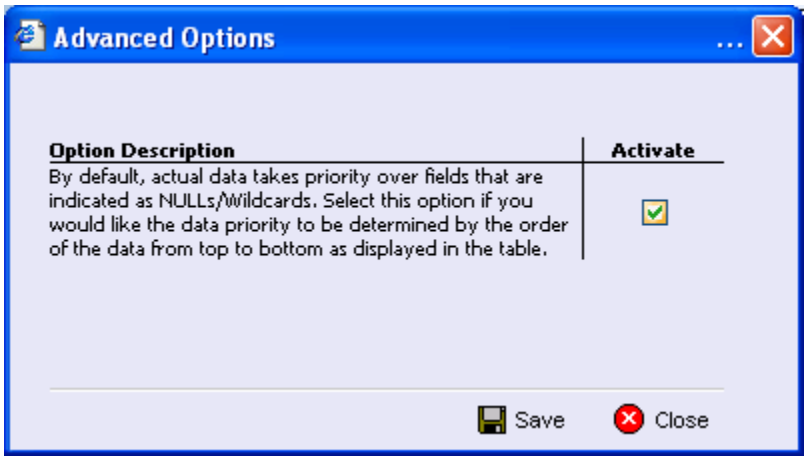


Figure 122 Advanced Options Mapped Variable

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.

Linked Variables Listing

Description: Displays the name of the current mapped variable and any linked variables.

Revision: Displays the version number of the current mapped variable and any linked variables.

Variable Information

Name: Entry for what you want the variable to be called. Alphanumeric characters are permitted, but no special symbols (ex: &, *, ", +, @, etc) are allowed. In the case of linked variables, each variable has its own name.

Default: Sets the default value of the variable. In the case of linked variables, a different default may be set for each.

Type: Type of data associated with the variable. Options are:

- **Decimal**
- **String**
- **Integer**
- **Date**

In the case of linked variables, a different data type may be set for each. If disabled by the system administrator in the configuration file, the data type cannot be changed for any existing variables.

Working Category: Sets the category type for the variable.

NOTE	If the category is not fully visible in the text box, you can hover your cursor over the text box and the complete category name will be displayed in an information box.

Available Variables

Drop down selection of available inputs, variables and results, sorted by category that can be used as criteria. To add an element as a criteria, locate it in the list and double-click it. On Policy Inputs, you will be able to add a new input variable without leaving the Edit screen. For the auto line of business, you will be able to add violation inputs and driver inputs as well.

Variable Selection Criteria

#: Sequential order of criteria selected from **Available Variables**.

Criteria: Displays the name of each input or variable selected as a criteria for this mapped variable.

Op (operator): Determines how the data in the table is used. If an operator of <= (less than or equal to) is used and the data table has a value of 5, the program will match on any input 5 or less. To change the operator, select the operator icon (default is =) and choose a new operator. See Comparison Operators for more details.

NOTE	Arithmetic comparison functions such as < and > cannot be used on string values. Only the operators of equal and not equal are available for string variables.

Type: Shows the data type of the criteria. The type of data in the mapped variable's table must match that of the criteria or an error will occur.

Mask: Determines how the data being passed into the program should be interpreted by allowing you to hold, remove or replace characters being passed. (Example: If you only wanted to accept the first, second and third characters of a VIN number being passed, this feature adds the ability to hold these characters and disregard the rest.) Click the icon to set the mask. See Masking for more information.

Wildcard: A check in this field tells the system that one or more rows in the table for this mapped variable will accept any value passed for this criteria. See Wildcard for more information.

Interpolate: A check in this field instructs RateManager to use interpolation to determine the correct value for the mapped variable. See Interpolation for more information.

NOTE	When creating templates, do not use a mapped variable as criteria for itself. This may result in an error.

Masking

Masking is a feature that allows you to determine how the data being passed into the program should be interpreted. For example, if only the first five digits of the VIN number passed in are needed, you can use the masking function to read only the first five characters of the value.

To Set a Mask

1. Click the mask icon . This will bring up the **Mask Value** popup.

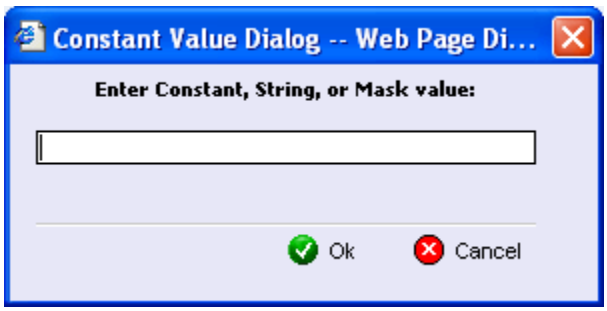


Figure 123 Mask Value Dialogue Box

2. Enter in the **Mask Value**.

3. Click **OK** to save the entry. You will be returned to the Edit Variable screen. The mask icon will now reflect that a mask has been set with a change in color .

Available Mask Options

Function	Definition	Keystroke(s)
Hold	Holds a character, i.e. keeps the character	~
Remove	Removes a character	|
Replace	Replaces a character with another character	Any character
Insert	Adds a character	^ + Any character

Examples

Function	Input	Mask	Result
Hold	GA263SX4597	~~~~~	GA263
Remove	VEH01	|||~~	01
Replace	Insbridge	~~~urance	Insurance
Insert	Cat	~^h~^r~	Chart

Wildcard

Wildcard is a function used when certain data in your table is only relevant in specific cases. For example, if Territory Code is determined by GaragingZip and, in some cases, ResidenceType, a value or an empty field could be used in the ResidenceType column.

The empty field signifies that anything being passed in this field is an acceptable match, as long as the wildcard option has been selected for that field. A specific value will only assign that territory if an exact match is made.

Wildcard Table

Territory Code	GaragingZip	ResidenceType
1	65478	2
2	65478	
3	65435	
4	65471	

If the table above is used, only the exact input values of GaragingZip 65478, and ResidenceType 2 would produce a Territory Code of 1. GaragingZip of 65478 with any other ResidenceType will produce a Territory Code of 2.

WARNING	***The wildcard function MUST be checked on the mapped variable screen if empty fields are used within the table. Otherwise, an incorrect match and error will occur.***

NOTE	When importing data for a mapped variable, use an asterisk to signify a field that is wild carded. Asterisks help insure the data gets imported properly into RateManager.

Interpolation

To interpolate means to estimate a value between two known values. For example, if you know that the Key Factor for a DwellingLimit of 10,000 is 2.00 and the Key Factor for a DwellingLimit of 20,000 is 3.00, you can use interpolation to figure out that the Key Factor for a DwellingLimit of 15,000 is 2.50. But what is the Key Factor for a DwellingLimit of 13,500? To find the Key Factor, input your table with the known values and select the checkmark under **Interpolate** next to the criterion you want to interpolate.

So, in our example above, we would interpolate on the DwellingLimit. Listed below are the steps used to calculate the Key Factor for a DwellingLimit of 13,500 from the example above.

Calculate the difference between the known Key Factor's to get a factor per 10,000 (since the difference between 10,000 and 20,000 is 10,000)	3.00 - 2.00 = 1.00
Divide the factor per 10,000 by 100 to get a factor per 100	1.00 / 100 = 0.01
Determine the number of 100's between 13,500 and 10,000	13,500 - 10,000 = 3,500 / 100 = 35
Multiply the factor per 100 by the number of 100's	0.01 x 35 = 0.35
Add the increased factor to the Key Factor for 10,000	0.35 + 2.00 = 2.35
So, the Key Factor for a DwellingLimit of 13,500	2.35

Interpolate should not be used in combination with wildcard. Conflicts may arise when combining a wildcard with an interpolated value.

Editing a Mapped Variable

The **Edit Variable** screen for mapped variables allows you to change information about the variable such as the name, data type, default value, working category and variables used as selection criteria. It also allows you to edit the data table, import a table, export the table and create new linked variables.

Variables that are grayed out or locked cannot be edited. Template generated variables that are using revision 1 are not open for editing. If you want to edit a template generated mapped variable, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed.

Navigate to the Edit Mapped Variable Screen

NOTE	A maximum of ten criteria can be added to a mapped variable.

1. Navigate to the Variable Listing for the program that contains the variable you want to edit.

2. Find the variable you want to edit and either double-click it or select it and click the **Edit Variable** tab. This will open the **Edit Variable** screen.

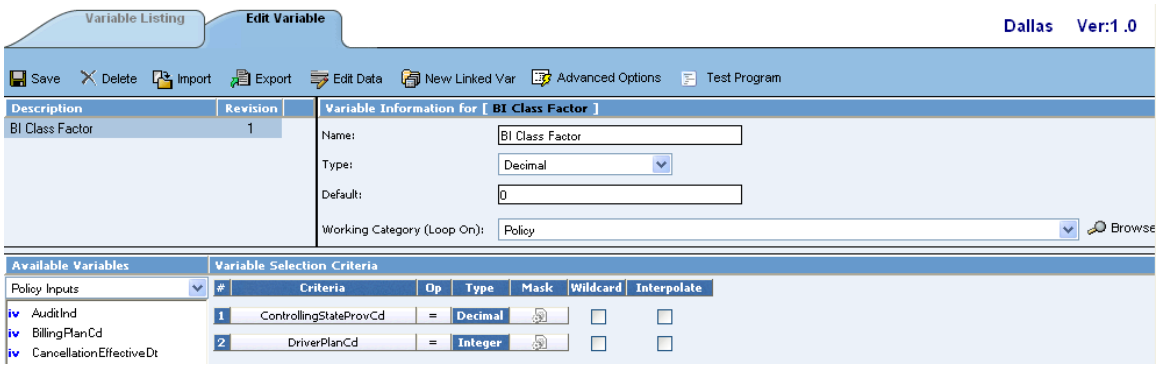


Figure 124 Editing a Mapped Variable

3. Enter in a **name**. Alphanumeric characters are permitted, but no special symbols (ex: &, *, ", +, @, etc) are allowed. In the case of linked variables, each variable will have a unique name.

4. Select the **type** of data associated with the variable. Options are:

   Decimal
   String
   Integer
   Date

   In the case of linked variables, a different data type may be set for each. If disabled by the system administrator in the configuration file, the data type cannot be changed for any existing variables.

5. Set the **default value** of the variable. A default value is the value assigned to the variable if a match is not found in the variable table. If your table is built in such a way that there should ***always*** (under valid circumstances) be a match in the table, then set the default value to either a very low number (0) or a very high number (999). By setting the default value to an extreme number, you will be aware immediately during the testing process if the table has not received a match. In some instances, it is advantageous to set the default value to a valid value. For example, if all cities in a state get a territory code of 1, except for a few, then you could set the default value to 1, and only have entries in the table for the exceptions. In the case of linked variables, a different default may be set for each one.

6. Select the **working category**. You can select the working category from the drop down menu or you can browse for a working category by clicking the Browse button. This will bring up the Browse Category popup.

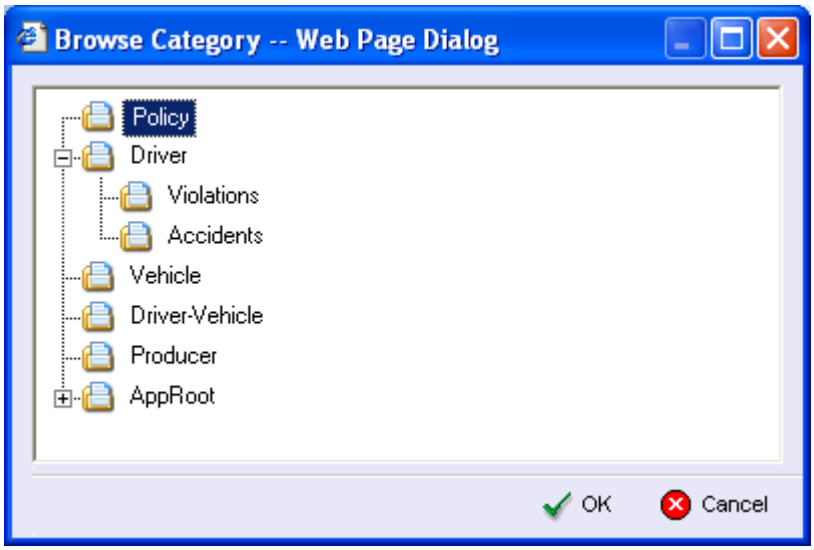


Figure 125 Browse Category

From here you can navigate to the Category you want. Once you have selected the category, click **OK**. The category will auto fill in the working category section.

7. Next, the criteria for the variable needs to be defined. The criteria determine whether or not this variable is used. Select an **available variable** from the drop down menu and double-click it. This will add it to the variable selection criteria screen. On Policy Inputs, you will be able to add a new input variable. For the auto line of business, you will be able to add violation inputs and driver inputs as well.

8. The order number, criteria, operator, and type will be populated with your selection. You cannot change the order number or the type. You can view information for the criteria.

   The right click menu options for **criteria** are:

   - **View Report** – You can view the mapped variable report.
   - **Where Used** – Displays where this variable is used.
   - **Delete** – Deletes the variable.

9. The **operator** can be changed if needed. The operators **equals** and **not equals** are available for all data types, but only numeric criteria will have **greater than**, **less than**, **greater than or equal to** and **less than or equal to** as options. To see the available options, right click and select the operator you want.

10. If you want to apply a **mask**, click the mask icon. See Masking for more information.

11. Check the **wildcard** box for any variable where you want the system to accept any passed criteria. See Wildcard for more information.

12. Check the **interpolate** box if you want to use interpolation to determine the correct value for the mapped variable. See Interpolation for more information.

13. Click **Save** to save your work.

Adding an Input Variable

A new input variable can be created while entering or editing a mapped or calculated variable, without leaving the Edit Variable screen. The category of the new variable cannot be changed here but can be edited on the Input Variables screen, if needed. If the new input variable needs to be in another category, you must leave the Edit Variable screen and create it in the Input Variable screen. For the auto line of business, you will be able to add violation inputs and driver inputs as well.

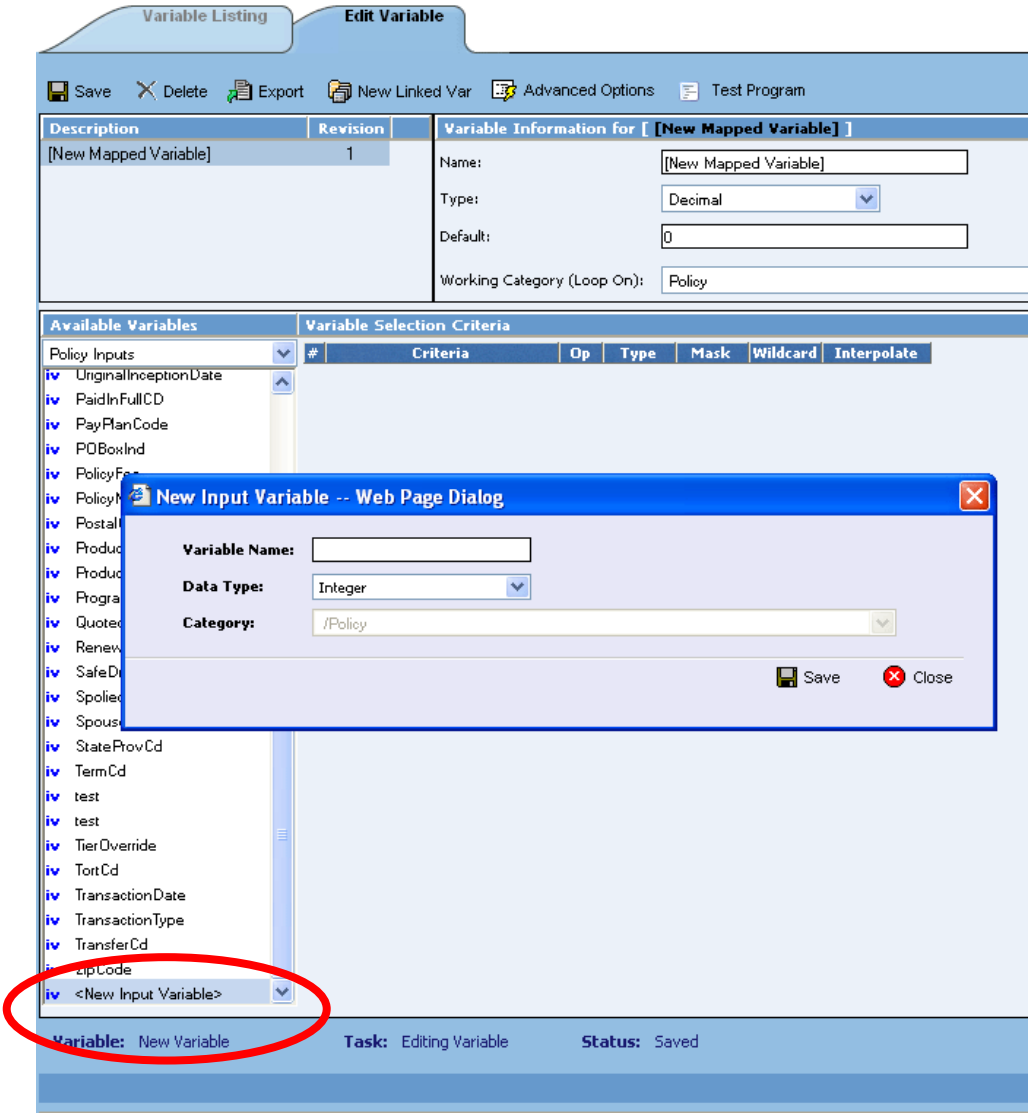


Figure 126 Adding an Input Variable

1. To create a new input variable, scroll down to the bottom of the policy inputs list. Select **<New Input Variable>**. The New Input Variable popup will be displayed.
2. Enter in a **Variable Name**.
3. Select the **Data Type**.
4. Click **Save** to save your entry. The popup window will close. Your new input variable will be available for selection.

Linked Variables

Linked variables are a group of mapped variables based on the same criteria. For example, if two different base rates were both based off the same table of territory codes, these two variables could be linked. RateManager supports a maximum of 100 variables associated with one single table. This means that a linked variable can have itself and 99 other variables.

Creating a Linked Variable

1. Find the variable you want to edit and either double-click it or select it and click the **Edit Variable** tab. This will open the **Edit Variable** screen.

2. Click the New Linked Variable button

. The variable information area at the top right hand portion of the screen will refresh. Another variable in the linked variable listing at the top left hand portion of the page will be added.

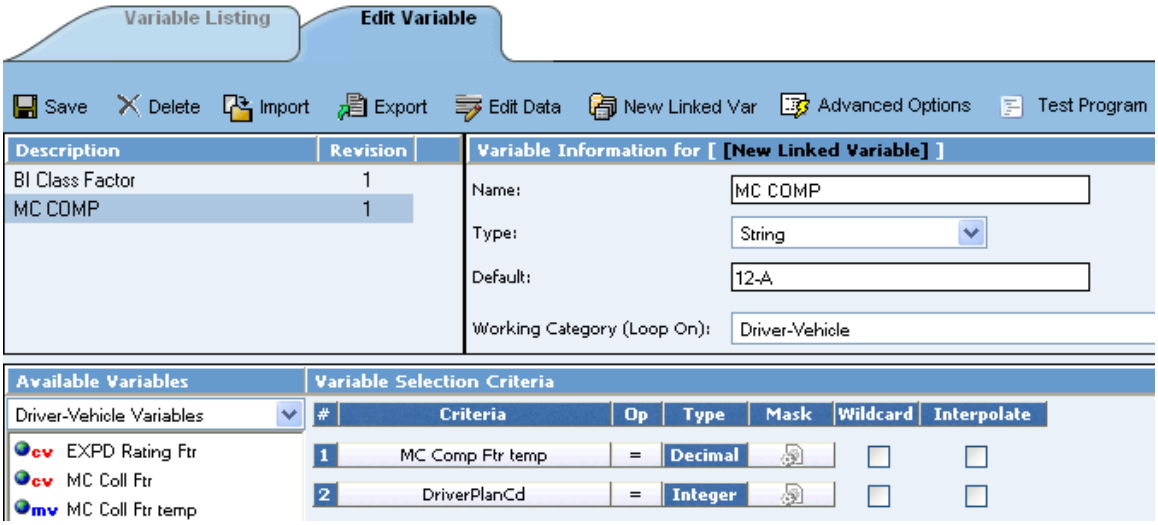


Figure 127 Creating a New Linked Variable

3. Enter in a name, select the type, a default, and the working category.

4. Click **Save** to save your work.

Additional Menu Options

The **Edit Variable** screen navigation menu will have two additional options when you are editing a mapped variable:

Import: Allows the user to import a tab-delimited data file. See Importing a Table for more information.

Edit Data: Shows the data table for the current mapped variable. The data table can be used for verification and quick editing purposes. Data can be changed and rows added or deleted from this screen. See Editing Data in a Table for more information.

Copy a Mapped Variable

Mapped Variables may be copied within any program. In your default subline you can copy a mapped variable to another program within the subline. Template sublines will allow you to copy within the same program only. When copying a mapped variable, there are four copy options:

Current Program – Copy Definition Only: Only the variable definition, the structure of the mapped variable (including the data type, default value, working category and criteria definitions) will be copied, but not the data, within the current program.

Current Program – Copy Definition & All Data: The mapped variable and all associated table data will be copied to the new variable within the current program.

Other Program – Copy Definition Only: Only the variable definition, the structure of the mapped variable (including the data type, default value, working category and criteria definitions) will be copied, but not the data, into another program within the same subline that you chose. This option is only for mapped variables within your default subline.

Other Program – Copy Definition & All Data: The mapped variable and all associated table data will be copied to the new variable into another program within the same subline that you choose. This option is only for mapped variables within your default subline.

All linked variables associated with the variable may be copied by checking the **Copy linked variables** check box on the copy variable popup box. If you do not choose to copy all linked variables, the system will only copy the linked variable that is being used in the variable you are copying. All other associated variables will not be copied.

Copying a Mapped Variable

1. Select the variable you want to copy and right click it. Select **Copy Variable** from the popup menu.

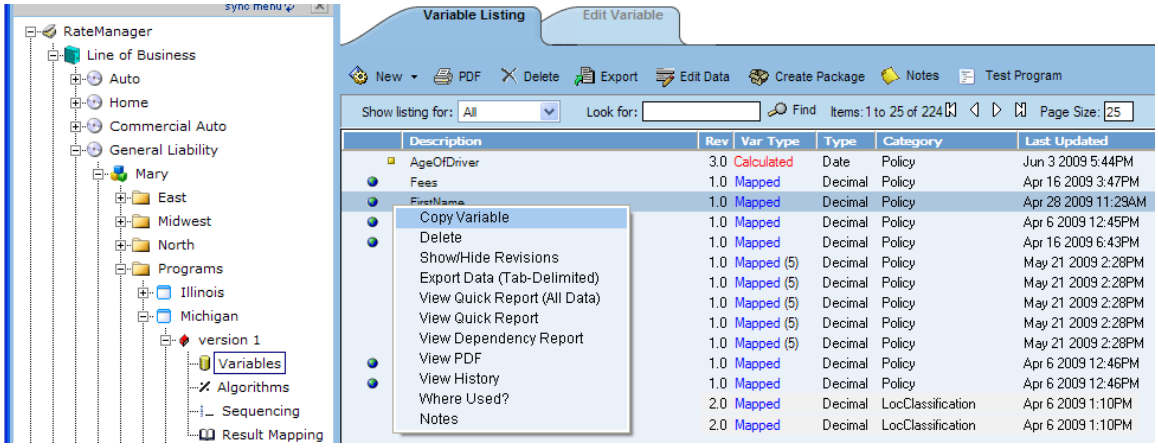


Figure 128 Copy Variable Menu

2. A separate popup window will be displayed.

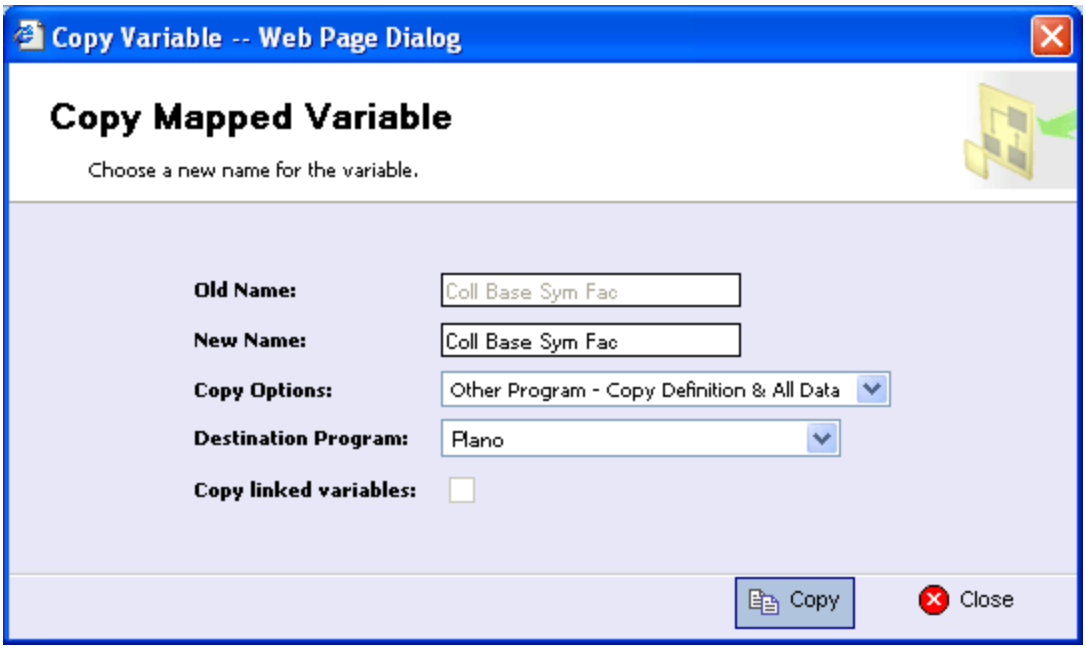


Figure 129 Copy Mapped Variable Popup

3. Enter in a **New Name**.

4. Select the **Copy Options**.

5. If you are copying a mapped variable within your default subline, you can select to copy the variable to another program within the same subline. Select the **Destination Program** from the drop down menu.

   If you are in a template generated subline, this option will be grayed out.

6. If there are linked variables and you want to copy them all, check the **Copy Linked Variables** box. If this option is grayed out, no linked variables are available to copy.

7. Click **Copy** to copy the variable. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.

8. If the copy was successful, you will be returned to the previous screen. Your variables will have been copied. The last updated date will be the date the copy was made.

Creating and Editing Import Files

In order to import data into RateManager, you need an import file. Import files are tab-delimited text documents, i.e. columns are delimited (separated) by a tab character. Tab-delimited files can be created using a spreadsheet such as Microsoft Excel or a text editor such as Notepad.

An import file holds the data for a mapped variable. It is important that the structure of the import table match the structure of the mapped variable. A few rules should be followed when creating

an import file:

- The file must be saved in tab-delimited format.
- Each result, or look-up, in the file must be in a row of its own.
- The first row in the file must contain column headings.
- Each column heading must be unique.

NOTE	The columns of data do not have to be in any particular order. During the import process, you will be able to match the columns in the input file with the variables and criteria in RateManager.

Importing a Table

1. Navigate to the **Edit Variable** screen for the mapped variable where you want to import a table.

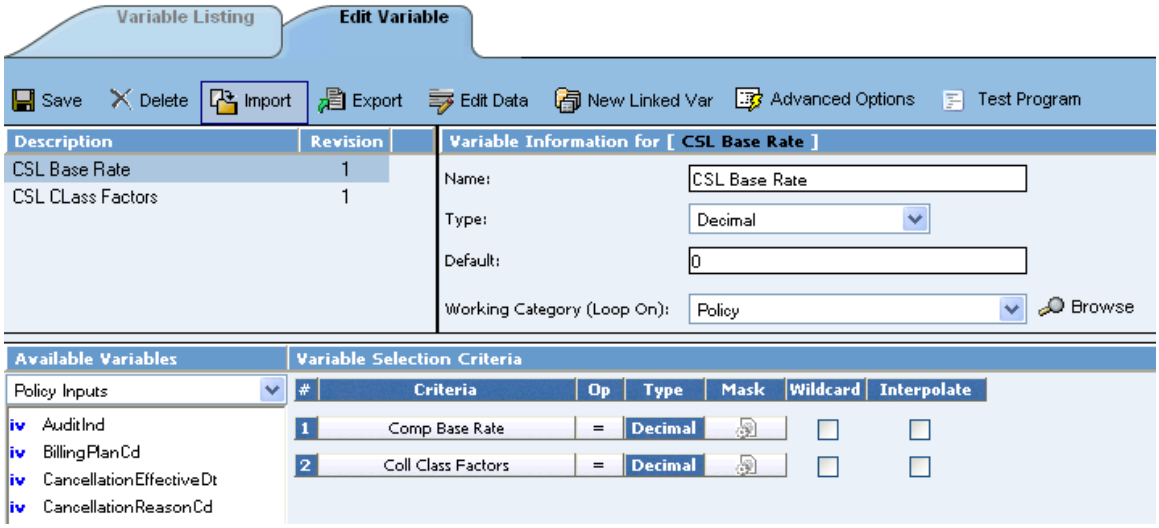


Figure 130 Importing a Table

2. Click the Import button on the navigation bar. This will open the following popup box.

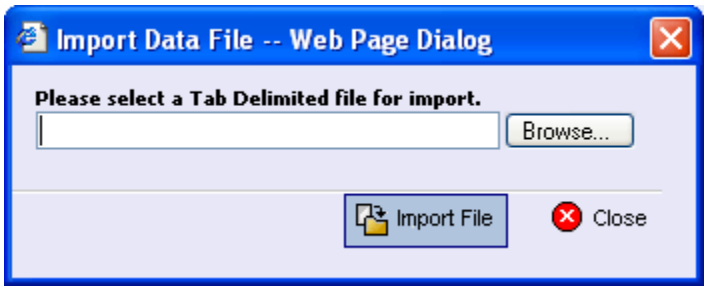


Figure 131 Selecting Data File

3. If you know the name and location of the file, you can type it into the text box. Otherwise click the **Browse** button to locate your file. Once the data file has been selected, click Import File.

   The file will be uploaded. An importing icon will be displayed while the file is uploading.

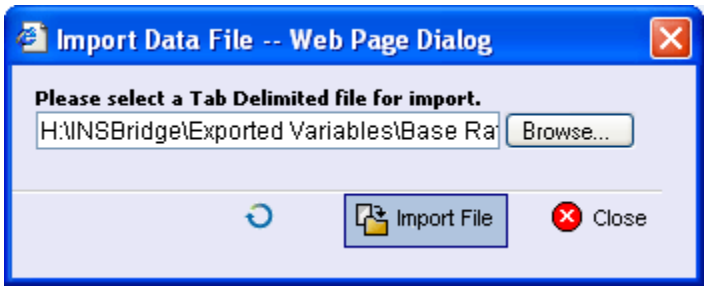


Figure 132 Importing a Mapped Variable

4. You will be asked if you would like to preview your data.

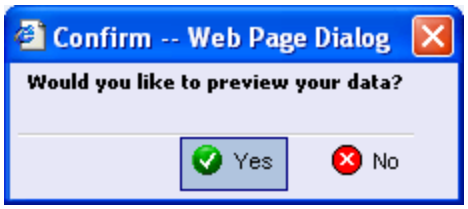


Figure 133 Confirming Preview of Data

5. Clicking **Yes** will allow you to see your import file. This view allows you to match the column headings to your variable(s) and variable criteria. The row count will be at the top of the screen.

   The import popup box is split into two parts. The top portion displays the import file as you created it. The bottom half lists the criteria and variable you created within RateManager with a drop down box where you can match up each element with the correct column in the import file.

   If the table contains multiple rows, you can use the Next 50 and the Previous 50 buttons to navigate through the table. You also can go directly to a row by entering the row number in the box Go To: and clicking anywhere outside the box.

   If enabled, a date mask for 'Date' data types will be displayed. If the system administrators have not enabled this feature, this field will not be visible.

   You will be able to highlight a row during column name selection.

NOTE	The "*" in the import file is stripped out during the import process in RateManager, so you will not see it in the edit data box. Likewise, if you manually enter your data into the edit data box, there is no need to put an "*" in the wildcard field. Simply leave the field blank.

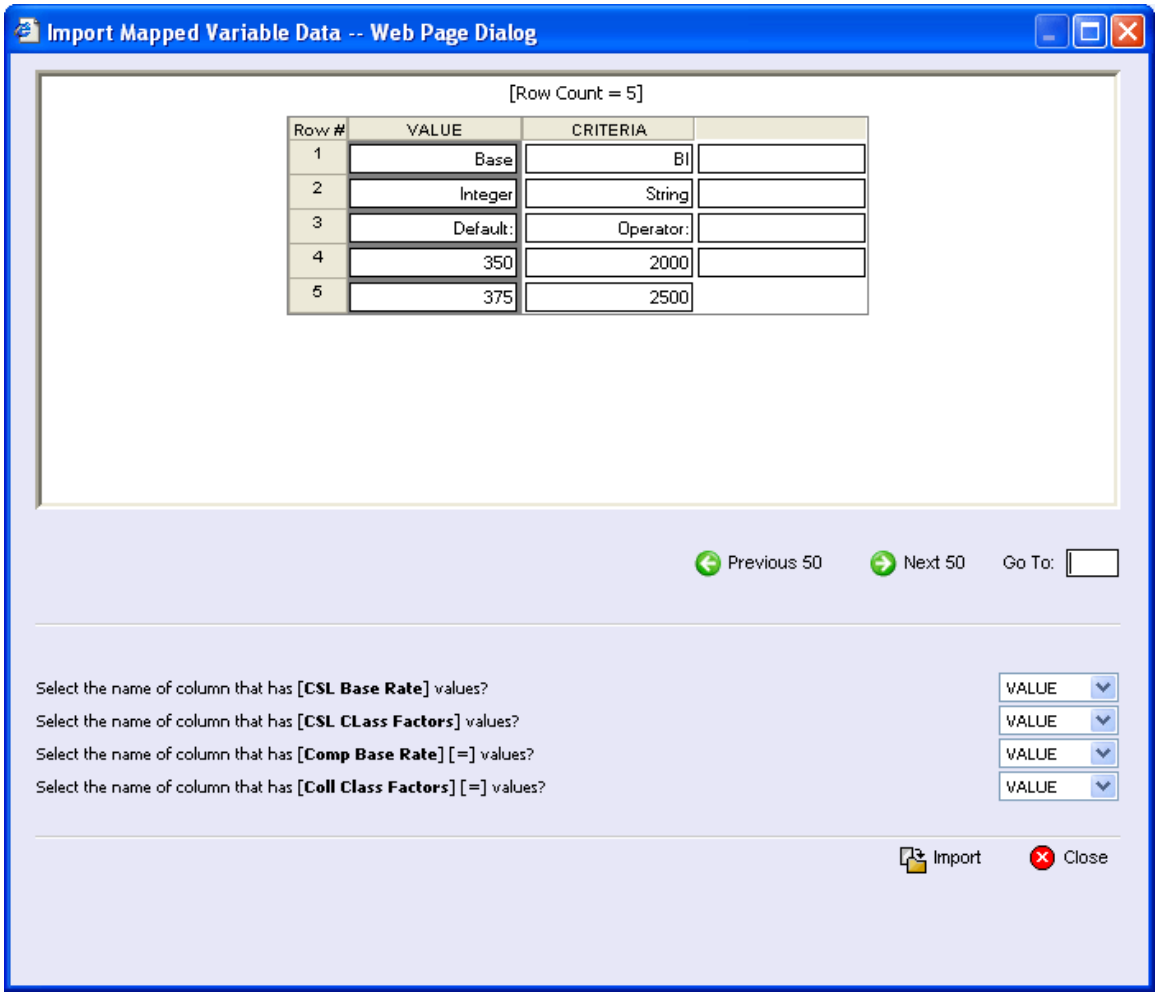


Figure 134 Previewing Data File

6. Clicking **No** allows you to match the column headings to your variable(s) and variable criteria without viewing the import file. This saves time when trying to import a large table.

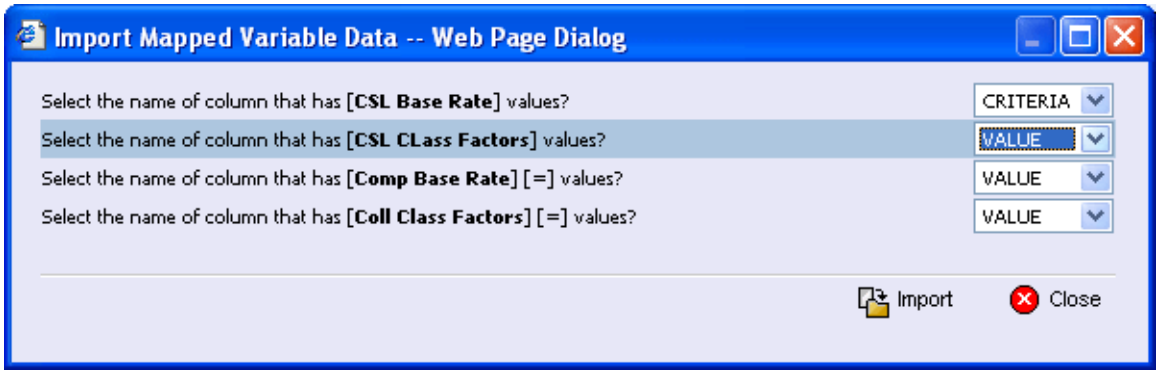


Figure 135 Not Previewing Data File

7. Select the drop down next to a variable or criteria to choose the column from the import file that contains data for that item. When you are finished matching columns, select Import.

8. If the mapped variable already contains data, you will be asked if you would like to delete the data first.

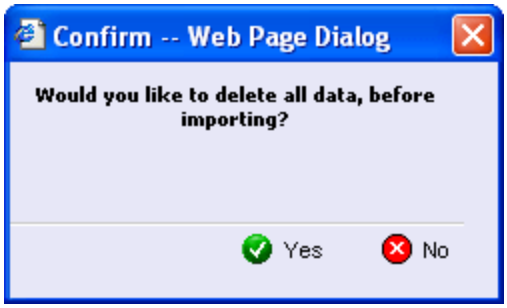


Figure 136 Confirming Delete All Data

9. Select **Yes** to have existing data in the mapped variable deleted before the new data is imported. Select **No** to leave the existing data in the mapped variable and have the new data added at the end of the table.

10. When importing is finished, a confirmation box will display, telling you how many rows were imported.

Figure 137 Successful Import Message

Editing Data in a Table

Edit data in a table when you want to add, delete or change the value for a row. For variables that are locked or grayed out, such as template generated variables, you will be able to view the data but not make any changes. If you need to make changes to a locked variable, you will have to create a new revision. The new revision will be open for editing.

If you need to make a lot of changes to the table, you may want to Export the table, edit it, and then re-import the table.

To Edit Data in a Table

1. Navigate to the **Variable Listing**.

2. Select the variable you want to edit and then click Edit Data. If you are on the Edit Variable screen, you can click Edit Data from there.

NOTE	If you are on the **Edit Variable** screen and you have changed the criteria information or added/deleted linked variables, remember to save your variable before editing the data.

3. This will open the **Edit Data** window. This screen displays the table data and lists the row count at the top of the screen.

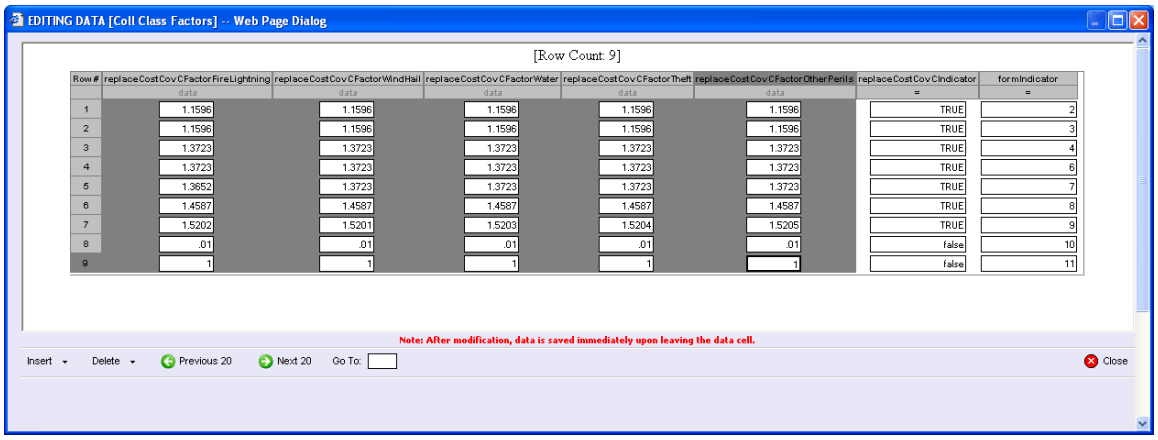


Figure 138 Editing Table Data

4. If the table contains more than twenty rows, you can use the Next 20 and the Previous 20 buttons to navigate through the table. You also can go directly to a row by entering the row number in the box Go To: and clicking anywhere outside the box.

5. To edit a cell, first select it by either tabbing to it or using your mouse to select it and then entering the new data.

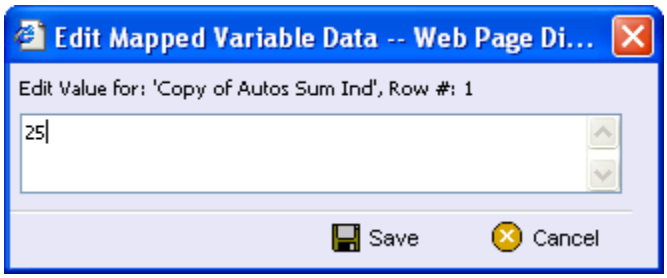


Figure 139 Edit Mapped Variable Data

NOTE	When you make a change to a cell in the data table, it is immediately updated in the database. Therefore, you cannot undo changes to the data table by clicking Close on the Edit Data screen. You must re-enter the data if you inadvertently change a value.

6. To insert a new row into the table, select a cell in the table where you want the new row to be inserted. Click Insert and then select either **Above Row** or **Below Row** to insert the new row either above or below the current row. If no cell is selected, the new row will be added to the end of the table.

7. To delete a row from the table, select a cell in the row you want to delete. Click Delete and then select **Current Row**. RateManager will not prompt for confirmation before deleting a single row.

8. To delete all rows from the table, click Delete and then select **All Rows**. RateManager will ask you to confirm deleting all rows.

Figure 140 Confirming All Rows Delete

9. Select **Yes** to delete all rows and return to the Edit Data window or **No** to return to the Edit Data window.

10. When you are finished editing the data, click **Close** to return the **Variable Listing** or **Edit Variable** screen. If you changed any of the data, the time stamp on the **Variable Listing** screen will be updated.

Exporting a Table

Exporting a table places all the data from a mapped variables data table into a tab-delimited text file. You can then make changes to the file and import the data into the same variable or a different variable.

To Export a Table

1. Navigate to the Variable Listing.

2. Select the mapped variable you want to export and click Export. You also can export the variable by right clicking it and select **Export Data (Tab-Delimited)** from the popup menu. The Export button is available from the Edit Variable screen.

3. You will be prompted by your browser to confirm downloading the file.

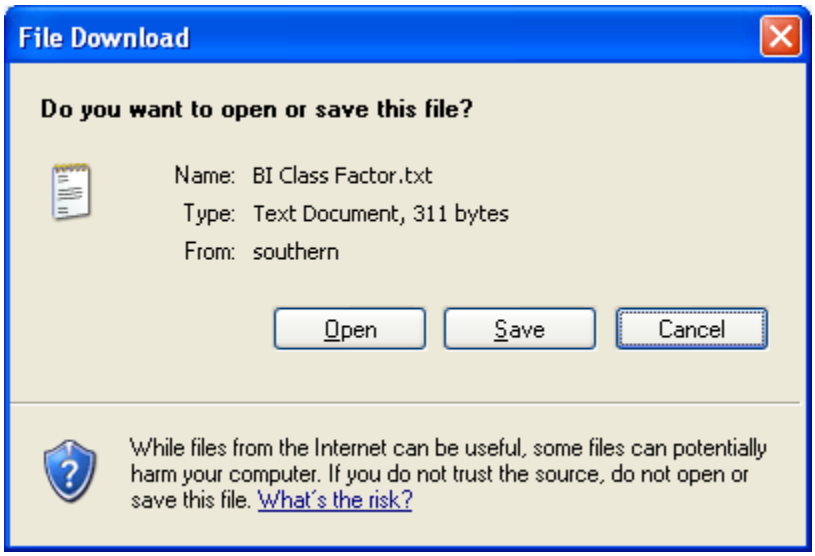


Figure 141 Exporting a Table

4. Click **Save** to save the file to your hard drive or **Open** to open the file with your default text editor.

5. If you chose to save the file, you will be asked to choose a location to save the file to.

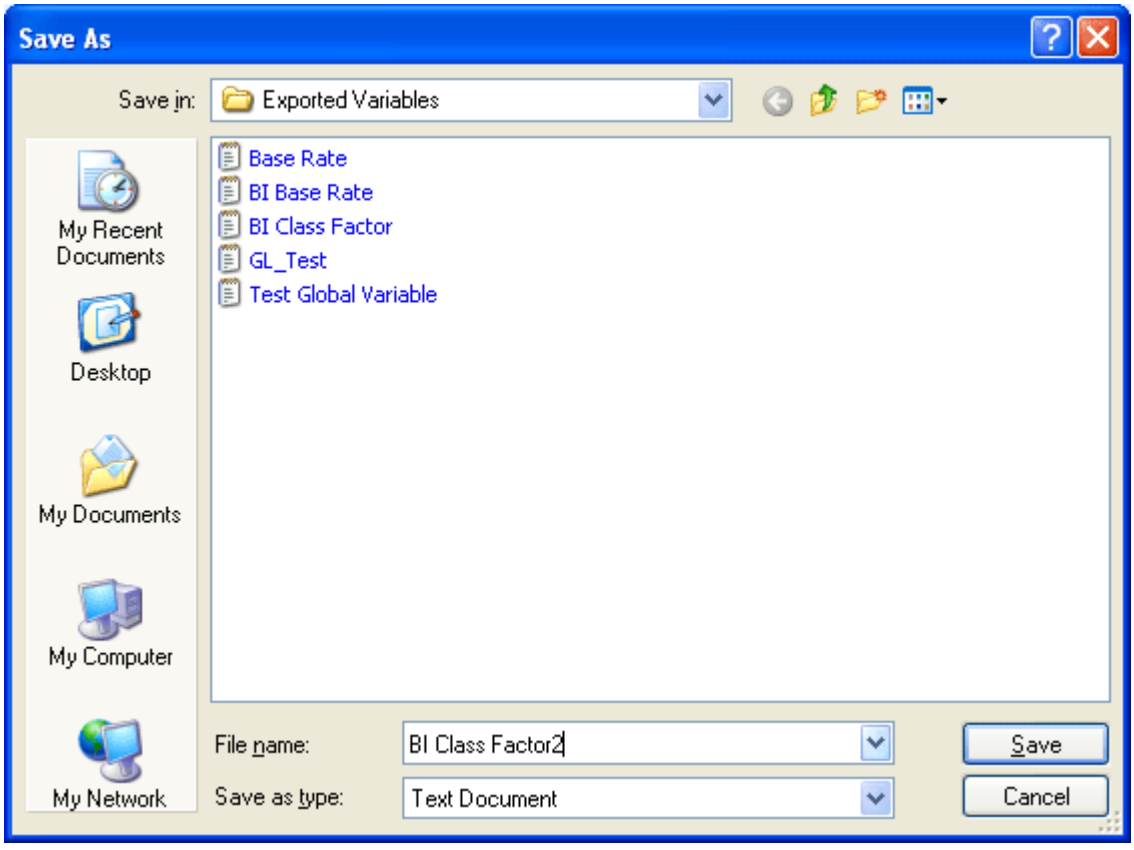


Figure 142 Saving a Table

6. Select the folder where you want to save the file and enter in a name for the file. By default, the file will be saved as the variable name. Click **Save**, the file will be saved to the location you specified. When the file has finished downloading, you will have the option to:

    a. **OPEN** – this opens the file in your default text editor.
    b. **OPEN FOLDER** – this will open your computers explorer.
    c. **CLOSE** – this will close the dialogue box.

    You can now edit the file with the text editor of your choice.

Creating a PDF

Any mapped variable can have a PDF of the data table created.

NOTE	PDF viewing software such as Acrobat Reader® is required to view PDF files.

To Create a PDF

1. Navigate to the Variable Listing.
2. Select the mapped variable you want to PDF and click PDF.
3. The PDF will open in a separate window. You can Print or Save to your local machine or network if needed.

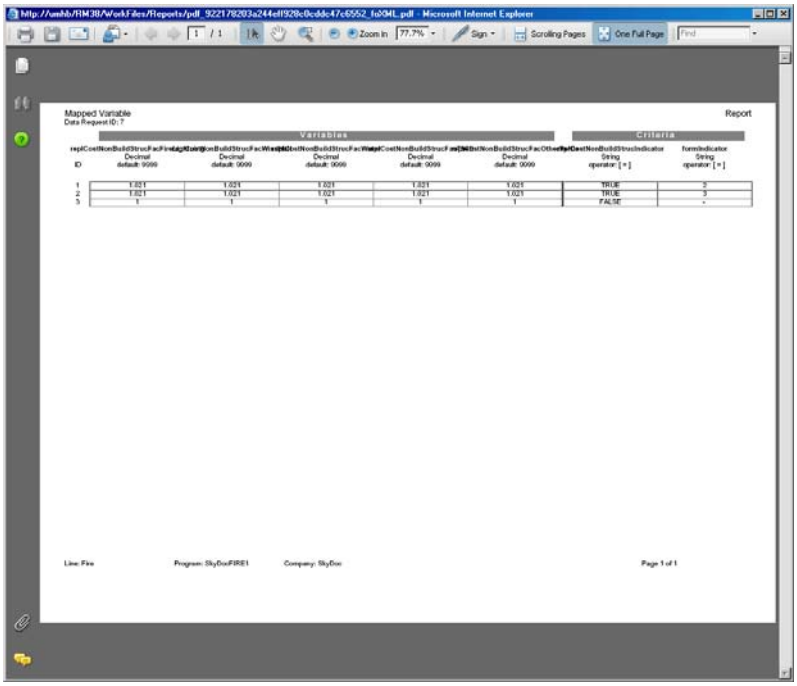


Figure 143 Creating a Mapped Variable PDF

Introduction to Calculated Variables

Calculated variables are used when a result cannot be derived from simple data mapping in a table. For example, if driver 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 inputs of effective date and driver date of birth.

A calculated variable supports advanced logic, such as arithmetic and if/then functions. Logic and functions within a calculated variable are created as steps. These steps are then added together to form a sequence of calculation.

NOTE	For the purposes of this manual, a calculated variable will be shown like this: Calculated Variable.

Calculated variables can be template generated or created by you. Template generated calculated variables will be grayed out and locked. They are not open for editing but can be copied.

Creating a Calculated Variable

Calculated variables will be displayed only in the program where you created it. Calculated variables can be added to both standard programs and template generated programs.

Creating a Calculated Variable

1. Navigate to the **Variable Listing** screen for the program you want to create a new calculated variable for.

2. Select New from the menu bar and then select **Calculated Variable** for the type of variable you would like to create.

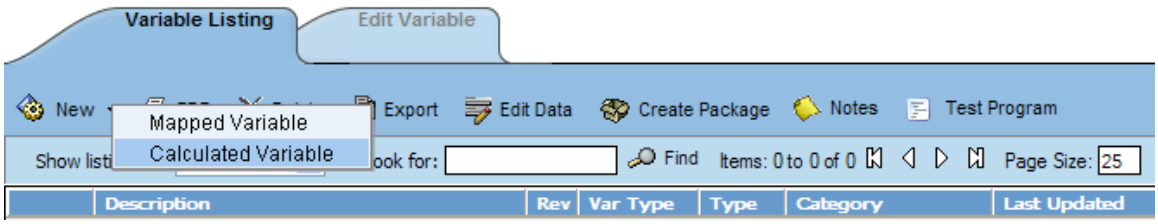


Figure 144 Creating a New Calculated Variable

3. This will open the **Edit Variable** screen for the new variable where you can enter or select the variable elements you need.

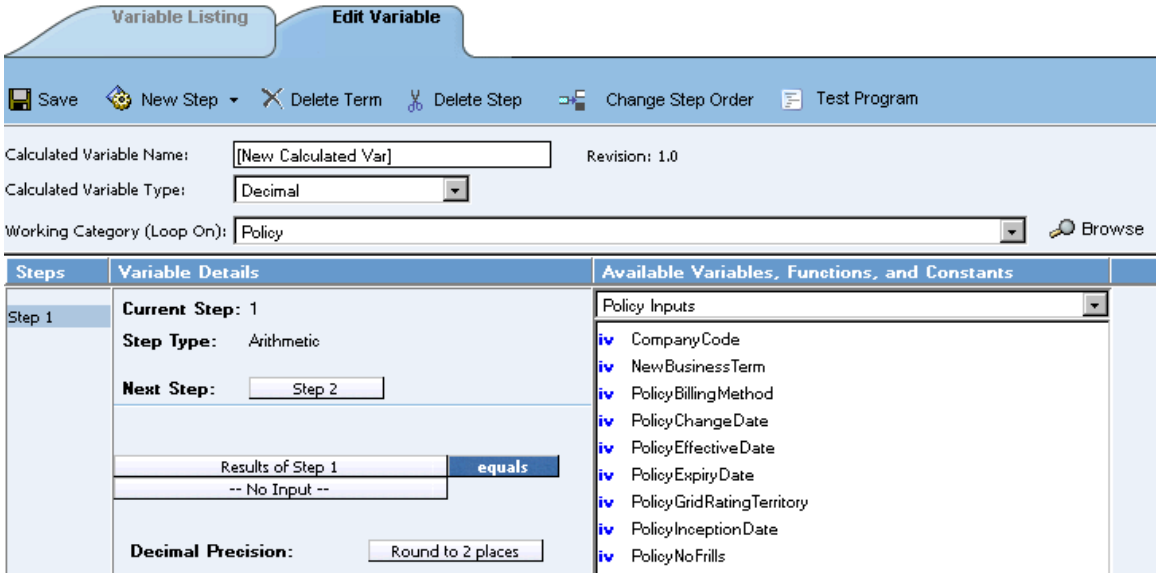


Figure 145 Editing a New Calculated Variable

Navigation Bar

Variable Listing Tab: Used to go back to the Variable Listing screen.

Save: Saves the current calculated variable.

New Step: Creates a new step in the calculated variable. For more information, see Step Types.

Delete Term: Deletes the currently selected term from a step in the calculated variable.

Delete Step: Deletes the currently selected step. You cannot delete the last step of a calculated variable.

Change Step Order: Allows users to change the order of the steps without using the drop and drag feature.

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.

Variable Name, Type & Category

Calculated Variable Name: Entry for what you want the calculated variable to be called. Alphanumeric characters are permitted, but no special symbols (ex: &, *, ", +, @, etc) are allowed.

Calculated Variable Type: Type of data associated with the variable. Options of decimal, string, integer or date are permitted.

Working Category: The working category of the variable.

Variable Details

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Variable Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set via a drop down listing by clicking on the text box next to **Rounding Precision**. You can select a rounding precision from 0 to 5 digits.

Available Variables, Functions and Constants Selection Box: Drop down selection of available inputs, variables, results and constants sorted by category. For the auto line of business, you will be able to add violation inputs and driver inputs as well. On Policy Inputs, you will be able to add a new input variable without leaving the Edit screen.

Editing a Calculated Variable

The **Edit Variable** screen for calculated variables allows you to change information about the variable such as name, data type, working category and steps. If the variable is locked, no changes will be allowed.

A new calculated variable always begins with an arithmetic step as **Step 1**. If you do not want an arithmetic step as your first step, add the desired step and then delete the arithmetic step. To do so, highlight **Step 1** and click the **Delete Step** button in the menu bar at the top of the page.

Variables that are grayed out or locked cannot be edited. Template generated variables that are using revision 1 are not open for editing. If you want to edit a template generated calculated variable, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed.

To Navigate to the Edit Calculated Variable Screen

1. Navigate to the Variable Listing screen for the program that contains the variable you want to edit.

2. Find the variable you want to edit and either double-click it or select it and click the **Edit Variable** tab. This will open the **Edit Variable** screen.

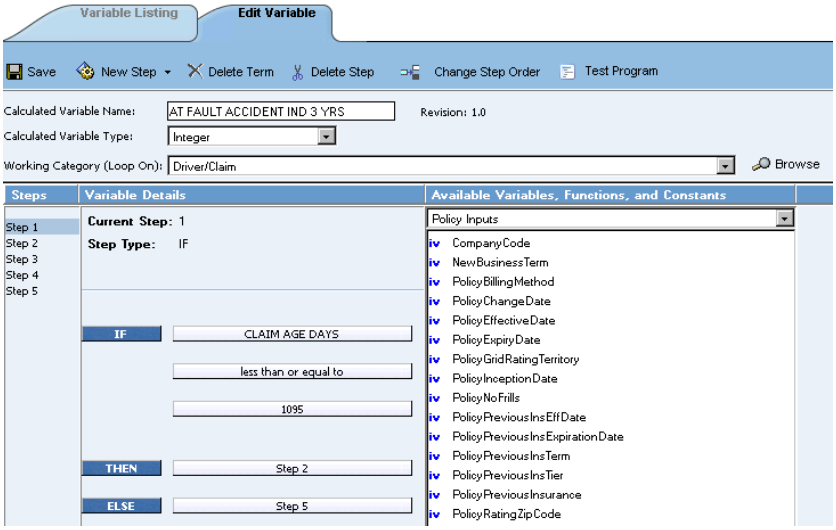


Figure 146 Editing a Calculated Variable

3. Enter a name for the calculated variable, select a data type (decimal, integer or string) and choose a working category.

NOTE	If the category is not fully visible in the text box, hover your cursor over the text box and the complete category name will be displayed in an information box.

You can select the working category from the drop down menu or you can browse for a working category by clicking the Browse button. This will bring up the Browse Category popup.

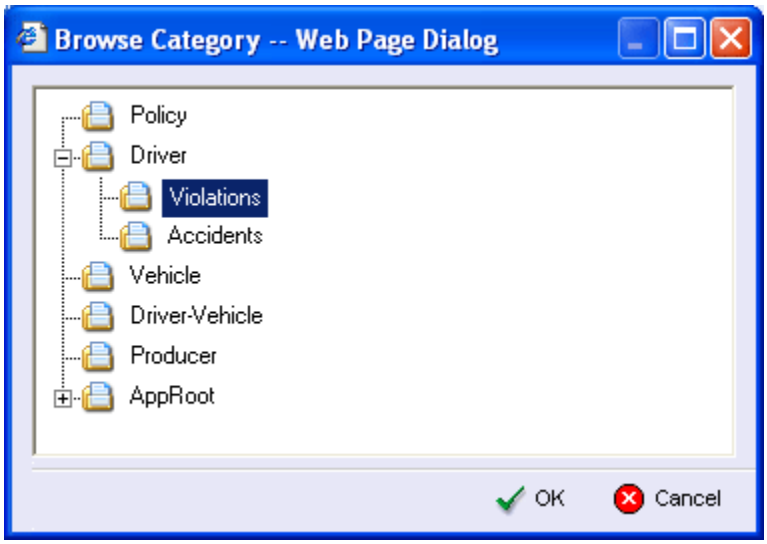


Figure 147 Browse Category

From here you can navigate to the Category you want. Once you have selected the category, click **OK**. The category will auto fill in the working category section.

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

NOTE	Always save a calculated variable after defining the variable name, data type, and working category. The calculated variable will not be available to be used within a step until the variable has been saved.

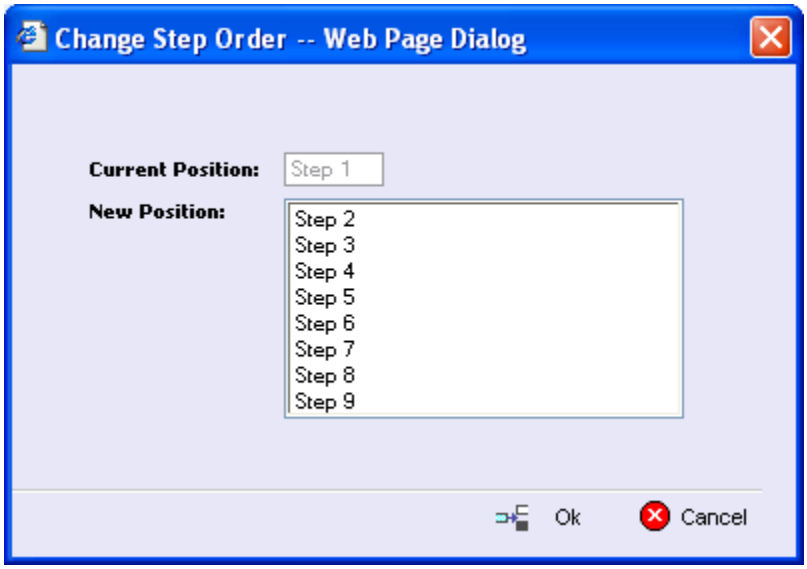
4. To add a new step to the calculated variable, click New Step and select the type of step you want to add. For more information on the types of steps, see Step Types.

5. The screen will refresh with the new step parameters. Depending upon the step type, you will have to select the appropriate variables, functions, constants or inputs. The value you need to select will be listed on the step. For example, if the step has an “Enter Variable” box, you must choose the variable type from the drop down menu on the right hand side of the screen. The options will be populated underneath. Click the “Enter Variable” box and then double-click the corresponding variable you want. The box will refresh with your selected value.

6. Continue entering steps until complete.

7. To change the step order, you have two options:

    a. Select a step in the **Steps** column, drag it to a new location in the list and drop it.
    b. Select the step you want to move and click the Change Step Order button. A separate screen will be displayed.



    c. The current step position will be displayed at the top of the screen. Select where you want the step to be placed.
    d. Click **OK**. You will be returned to the edit variable screen. Your step should be placed where you chose.

8. To delete a step, select the step in the **Steps** column and then click Delete Step. You cannot delete the last step from a calculated variable.

9. When you are finished making your entries, click **Save**.

Adding a Custom Value Constant

A new custom value constant can be created while entering or editing a calculated variable, without leaving the Edit Variable screen. The custom value created will be for this step only. It will not be displayed with other constant values. If you want to use this value again, you will have to enter it in again or create a variable using that constant.

There are two ways to enter in a custom value constant:

- Right click menu on an input.
- Select **Custom Value** from the Constants menu drop down.

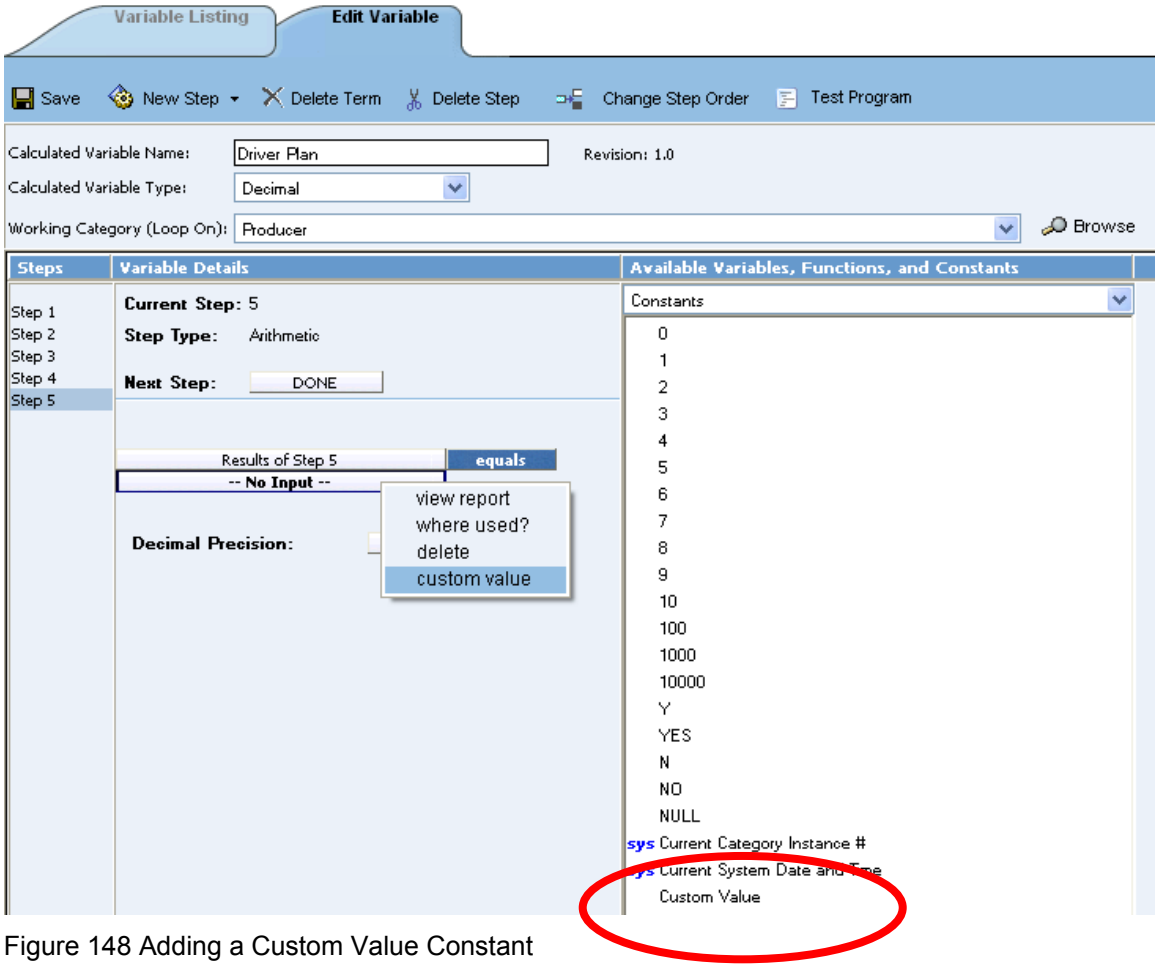


Figure 148 Adding a Custom Value Constant

1. To create a custom value constant:

    a. Scroll down to the bottom of the constants menu options. Select **Custom Value**. The Custom Value popup will be displayed.
    b. Right click on the input. Select **Custom Value**. The Custom Value popup will be displayed.

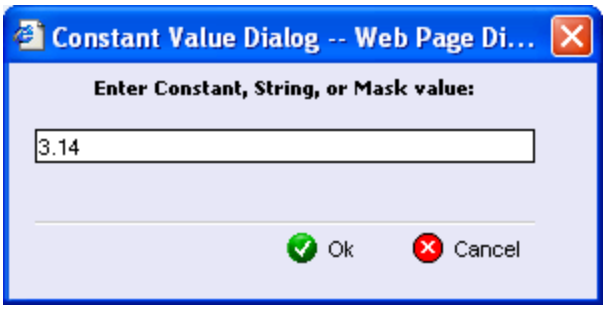


Figure 149 Custom Value Popup

2. Enter in a **Value**.
3. Click **Ok** to save your entry. The popup window will close. Your new custom value will be populated in the input.

Copy a Calculated Variable

Calculated variables may be copied within any program. In your default subline, you can copy calculated variables to another program within the same subline. Template sublines will allow you to copy within the same program only. When copying a calculated variable, there are two copy options:

Existing Program – Copy the variable into the existing program under another name.

Other Program – Copy the variable into another program within the same subline. This option is for calculated variables within your default subline.

Copying a Calculated Variable

1. Select the variable you want to copy and right click it. Select **Copy Variable** from the popup menu.

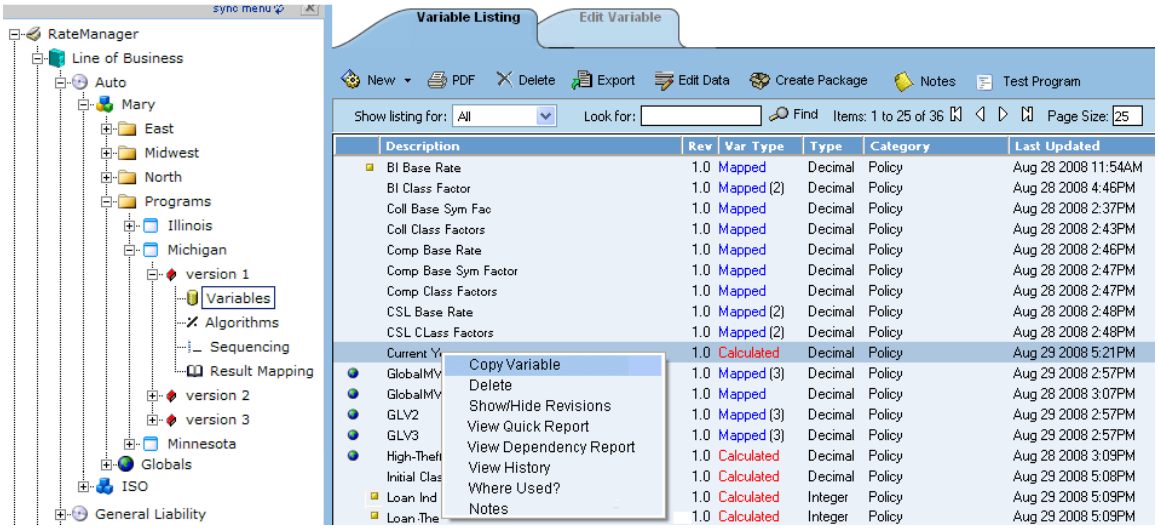


Figure 150 Copy Variable Menu

2. A separate popup window will be displayed.

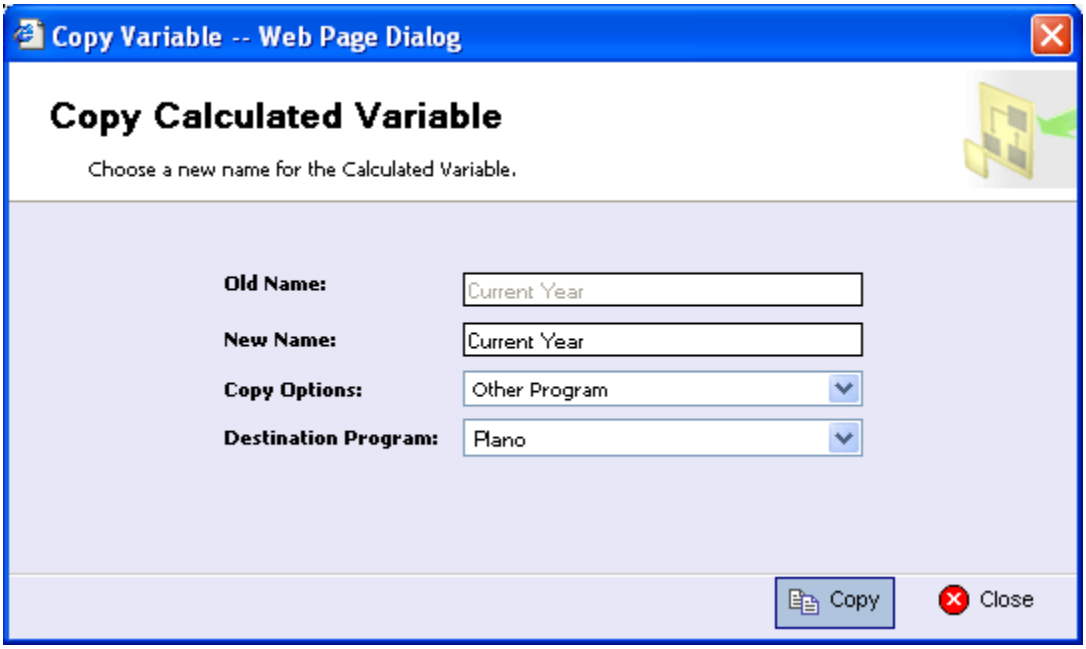


Figure 151 Copy Calculated Variable Popup

3. Enter in a **New Name**.
4. Select the **Copy Options**.
5. If you are copying a calculated variable within your default subline, you can select to copy the variable to another program within the same subline. Select the **Destination Program** from the drop down menu.
6. Click **Copy** to copy the variable. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.
7. If the copy was successful, you will be returned to the previous screen. Your variable will have been copied. The last updated date will be the date the copy was made.

Resolving Dependencies

Dependencies may arise when you copy a variable, algorithm or driver assignment. Some dependencies may involve naming issues or may require you to create new variable. All dependencies will be listed. The options that you will have to choose from will not create further dependencies. For driver assignment, only available driver assignment functions will be shown.

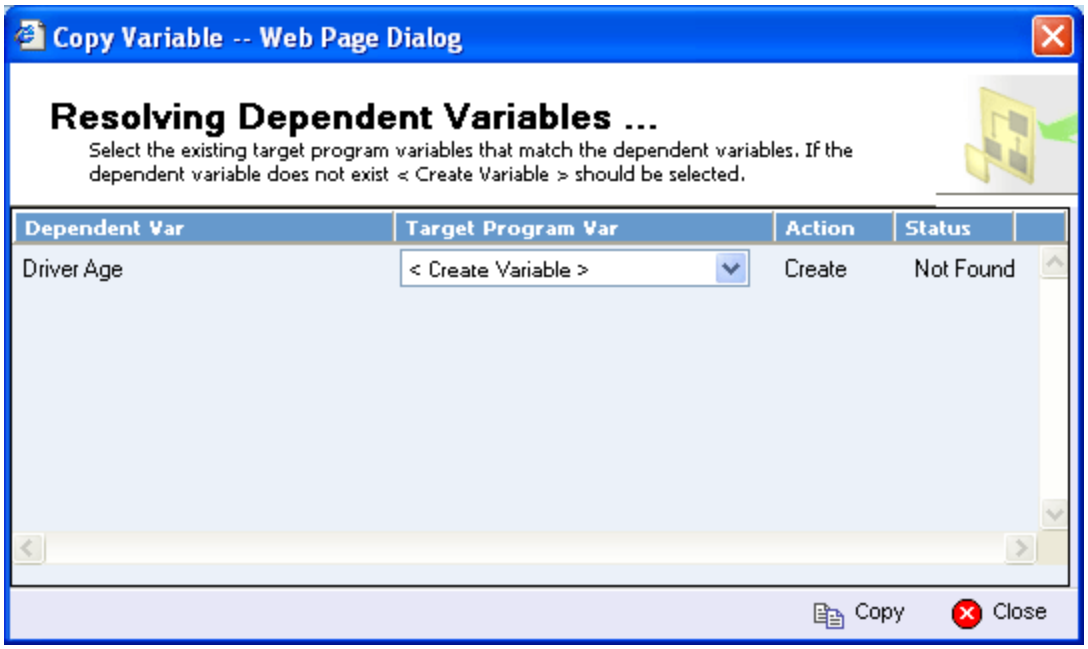


Figure 152 Resolving Dependent Variables Creating Variable

The action column can contain three options:

- **Create** – This will create a new variable.
- **No-Action** – The variable in the Target Program Var field will be used.
- **Replace** – A new variable has been selected.

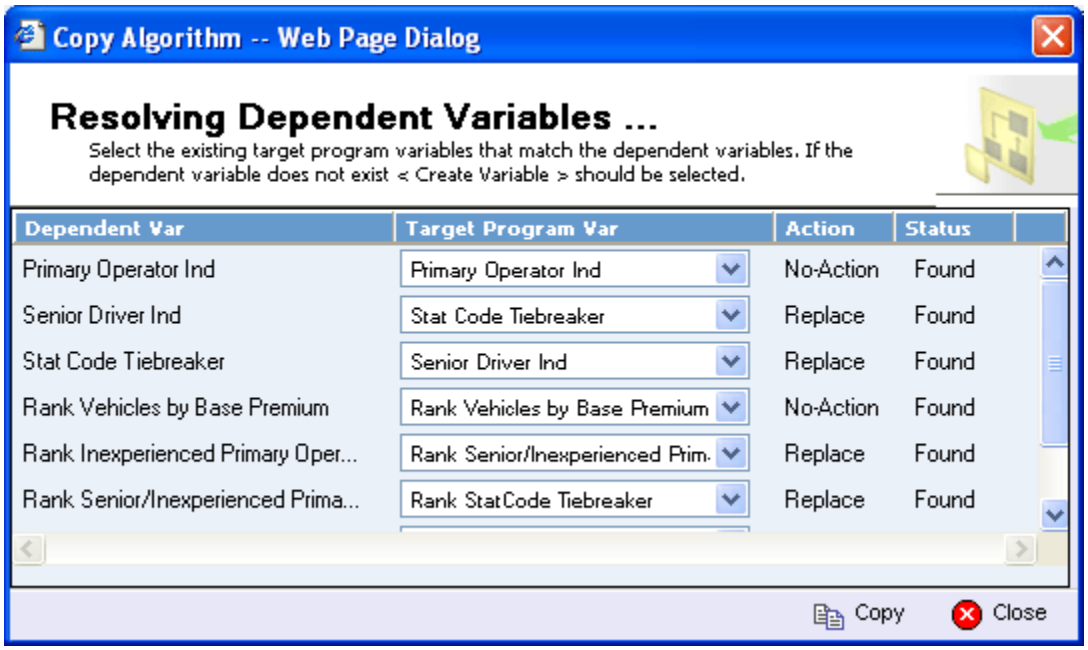


Figure 153 Resolving Dependent Variables

1. Select the **Target Program Var** you want from the drop down menu.

2. Click **Copy**. The dependencies will be resolved and you will be returned to the previous screen. Your variable will have been copied. The last updated date will be the date the copy was made.

Creating a Variable Revision

Variable revisions can be created in both standard programs and in template generated programs, unless locked. In standard program revisions, all elements will be open for editing. In template generated program revisions, the name will not be open for editing. All other items can be edited as needed.

When you create a new variable revision, it gets created in all versions of the program. For more information on variable revisions and versioning, see Introduction to Versioning.

To Create a Variable Revision

1. Navigate to the **Variable Listing** screen for the program that contains the variable where you want to create a new revision.
2. Select the variable you would like to create a new revision for and right click it. Select **Show/Hide Revisions** from the popup menu.

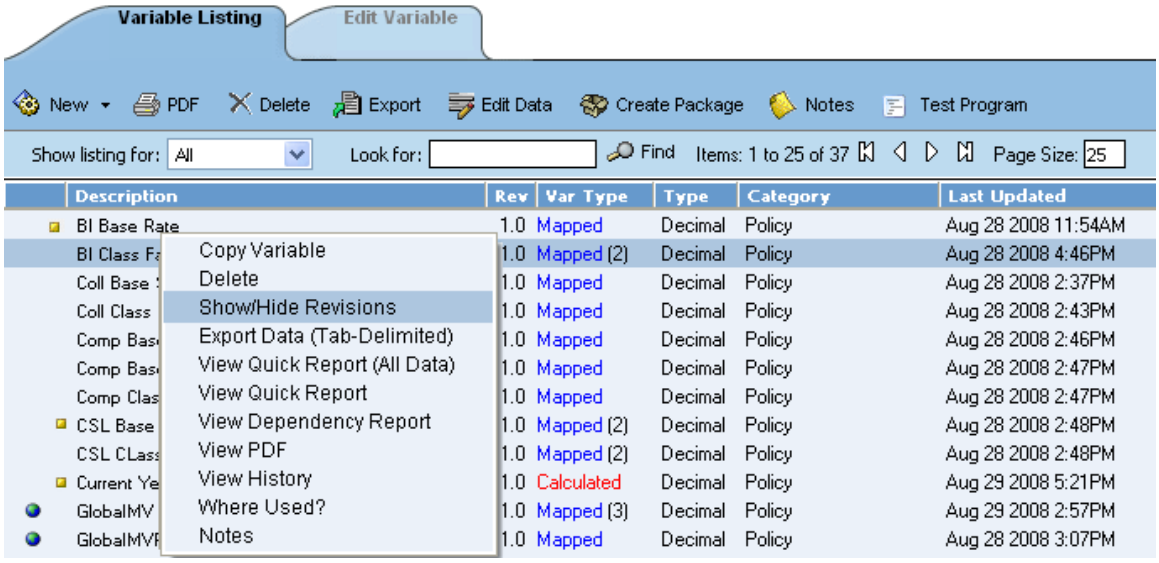


Figure 154 Selecting a Variable to Revise

3. Select the revision you would like the new revision based on and right click it. Select **New Revision** from the popup menu.

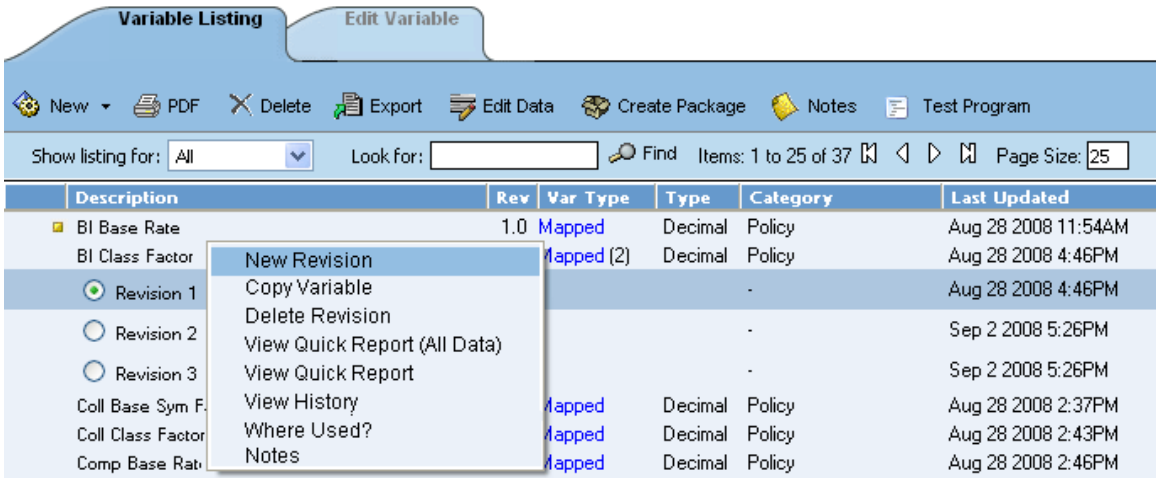


Figure 155 Revising a Variable

4. The new revision will be created as the next available revision number and the listing will refresh. However, the program will not use the new revision until it is set as the active revision. See Changing the Active Revision of a Mapped Variable.

Changing the Active Revision of a Variable

Once you have created a new revision, you can set it as the revision of the variable that will be used during rating. Changing the active revision in one version of a program does not set it as the active revision for other versions of the program.

The active revision can be changed on both unlocked standard programs and unlocked template generated programs. On a template generated program, if you change the revision from a template generated revision to a revision that you created, the variable will be open for editing. If you change back to the template generated revision, the variable will be locked and no longer open for editing.

To Change the Active Revision of a Variable

1. Navigate to the **Variable Listing** screen for the program and version that contains the variable where you want to change the active revision.

2. Select the variable you would like to change the active revision for and right click it. Select **Show/Hide Revisions** from the popup menu.

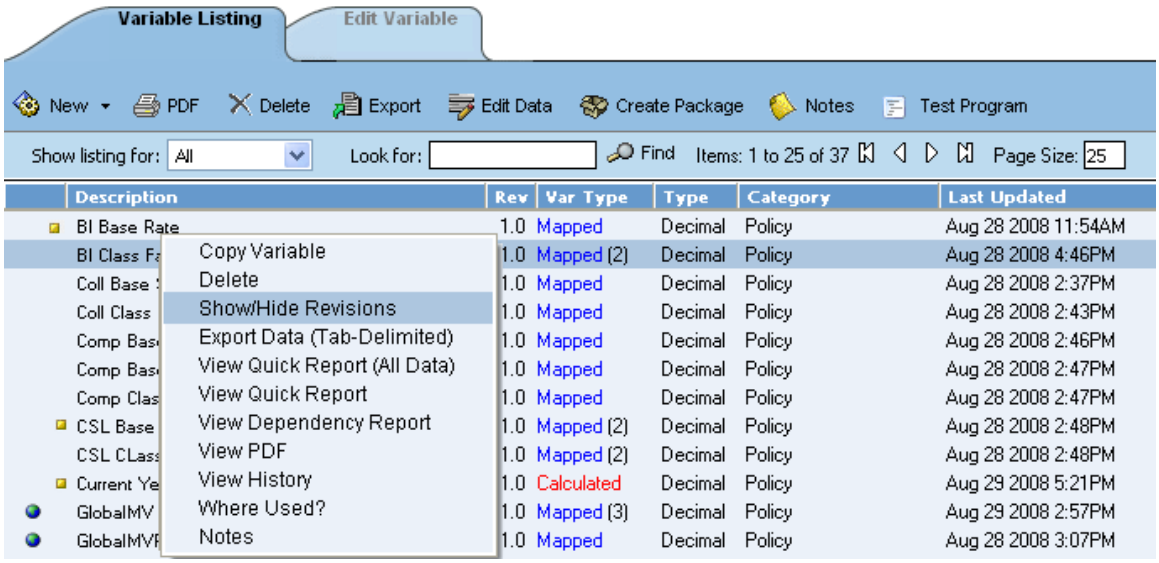


Figure 156 Selecting an Active Revision to Change

3. Select the radio button next to the revision you would like to make active.

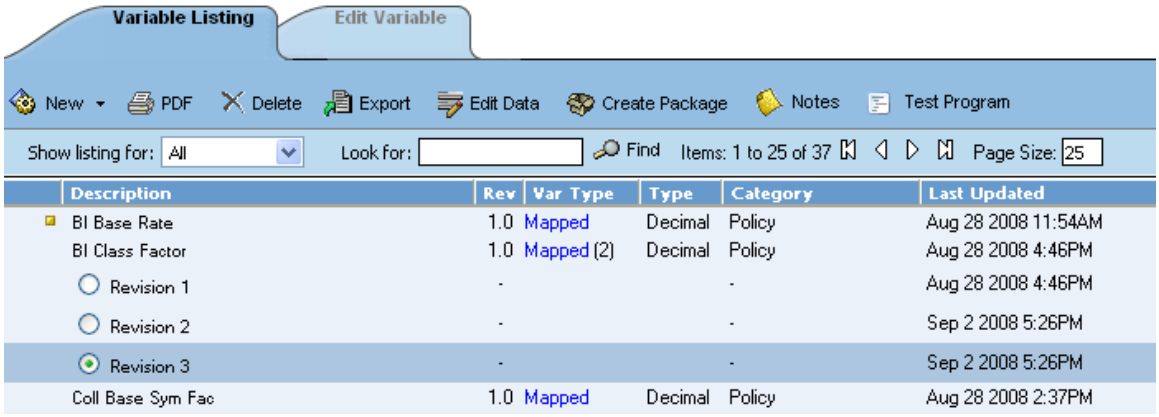


Figure 157 Changing the Active Revision of a Variable

4. You will be asked to confirm changing the active revision.

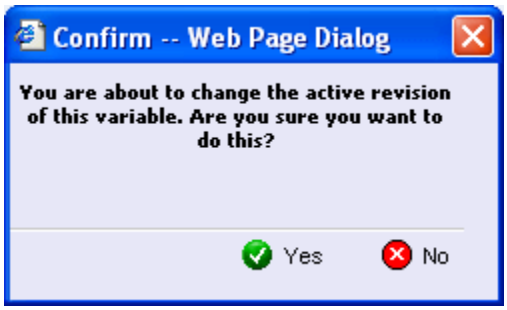


Figure 158 Confirmation Message

5. Select **Yes** to change the active revision and refresh the variable listing. Select **No** to return to the variable listing.

Deleting a Variable

When a variable is no longer needed, it can either be left in RateManager or deleted. When you delete a variable, it gets deleted from all versions of the program. Also, all revisions of that variable get deleted. If you are uncertain as to whether the variable will be used again, simply leave it in RateManager. This will save time if the variable is needed and won't slow down rating.

Deleting a Variable

1. Navigate to the Variable Listing screen for the program that contains the variable you want to delete.

2. Select the variable you want to delete and either right click it and select **Delete** from the popup menu or click the Delete button.

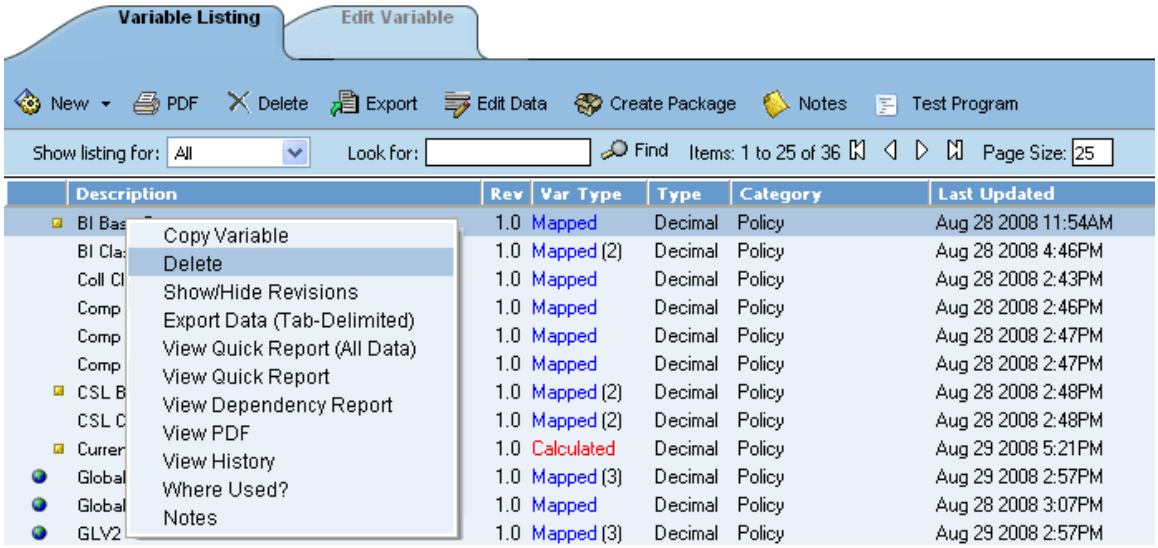


Figure 159 Deleting a Variable

3. You will be asked to confirm the deletion of the variable.

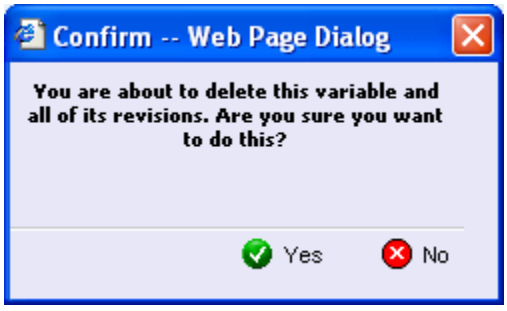


Figure 160 Confirmation Message for Delete

4. Select **Yes** to delete the variable and refresh the variable listing. Select **No** to return to the variable listing.

If you try to delete a variable that is still being used by an algorithm, a result group or another variable, you will receive an error. Variables that are locked or that are template generated cannot be deleted.

NOTE	Variables that are in use by an algorithm cannot be deleted.

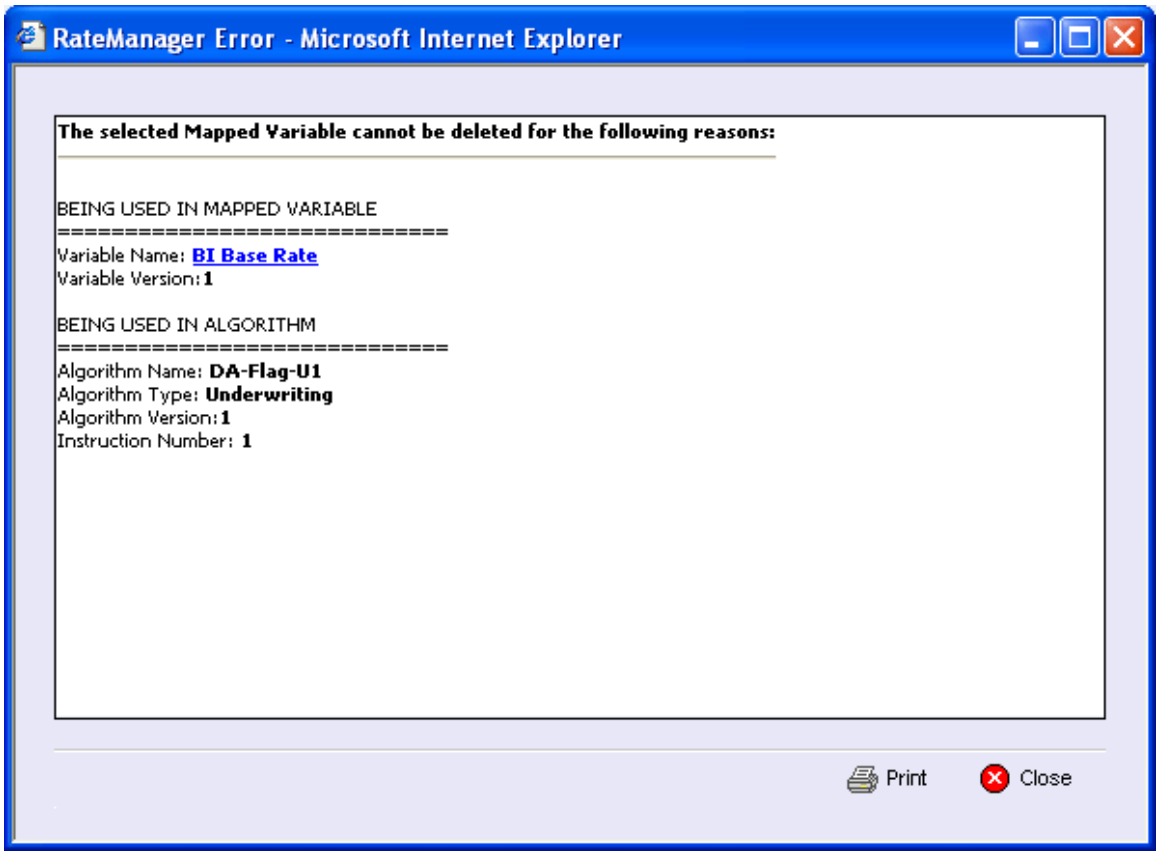


Figure 161 Error Message for Deleting a Variable

Deleting a Variable Revision

When a variable revision is no longer needed, it can either be left in RateManager or deleted. Linked variables, active revisions and template generated revisions cannot be deleted. When you delete a revision, it gets deleted from all versions of the program. If you are uncertain as to whether the revision will be used again, you can leave it in. This will save time if the revision is needed and won't slow down rating.

To Delete a Variable Revision

1. Navigate to the **Variable Listing** screen for the program that contains the variable revision you want to delete.

2. Select the variable that contains the revision you would like to delete and right click it. Select **Show/Hide Revisions** from the popup menu.

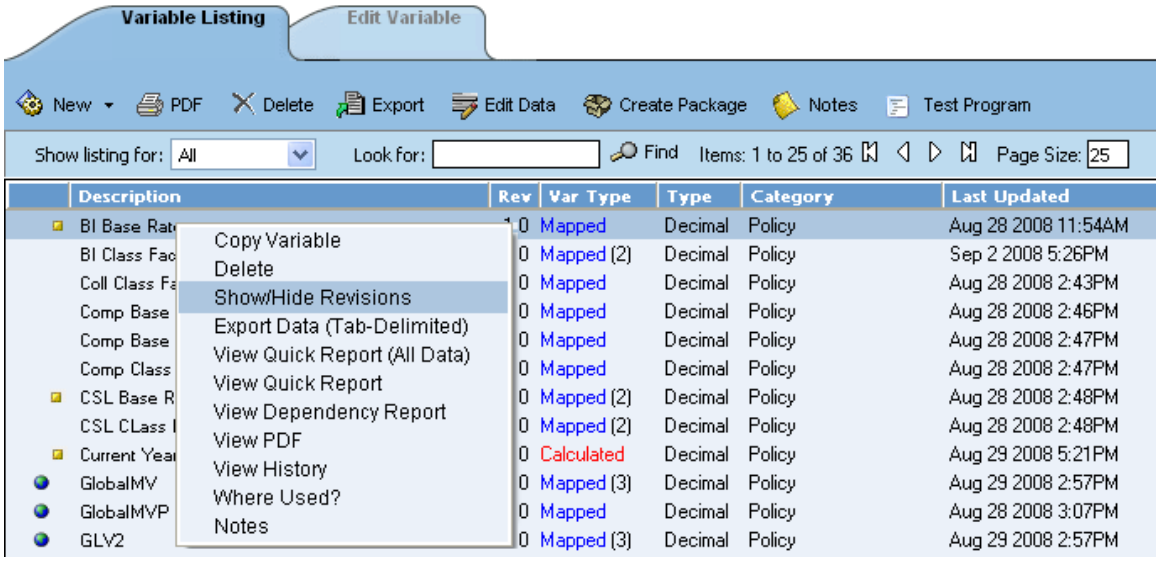


Figure 162 Selecting a Variable Revision to Delete

3. Select the revision you would like to delete and right click it. Select **Delete Revision** from the popup menu.

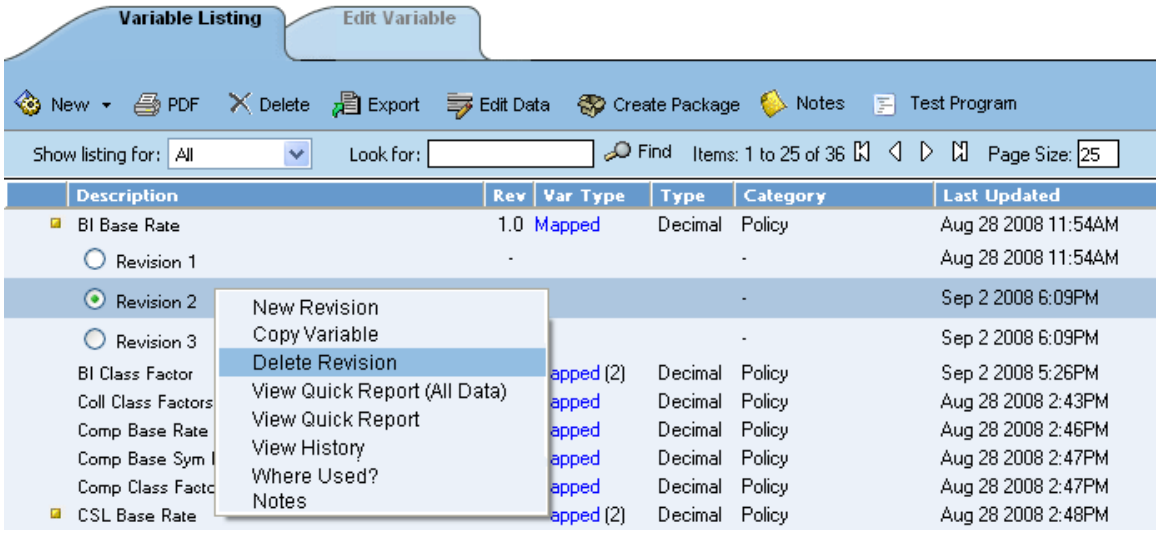
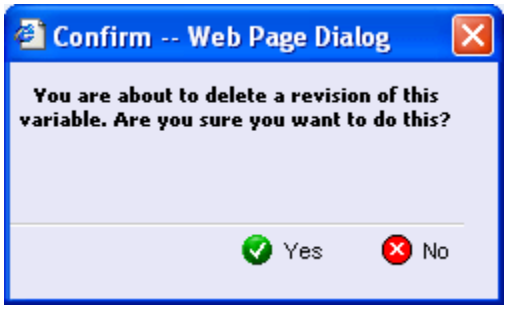


Figure 163 Deleting a Revision

4. You will be asked to confirm the deletion of the variable revision.



5. Select **Yes** to delete the variable revision and refresh the variable listing. Select **No** to return to the variable listing.

   If you try to delete the activated revision for the current program version, you will receive an error message instructing you to activate another revision and try again.

   If you try to delete a linked variable, you will receive an error message informing you that linked variables cannot be deleted. You can delete the entire variable if necessary.

View Report – Result Variables, Input Variables

When you are in Edit mode, you can view the pertinent information for a result variable or an input variable by right clicking the variable. A popup will be displayed with the information you need, including Type and Category, allowing you to stay in Edit mode.

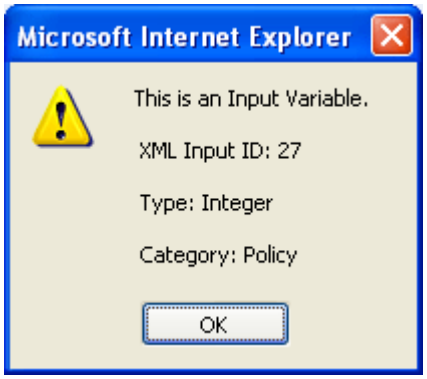


Figure 164 View Report for an Input Variable

View Quick Report

Reports give a detailed view of a variable, algorithm or scenario showing either all of the steps or all of the table data, depending on type.

Reports are useful when reviewing because it eliminates the need to click through each step. Additionally, viewing a Report when in Edit Mode reduces the need to search for and review the variable, algorithm or scenario outside of Edit Mode.

Quick Reports can be accessed from the right click menu:

- **View Quick Report (All Data)** – This option is only available on mapped variables and shows all table data associated with the variable.
- **View Quick Report** – This option is for mapped and calculated variables, algorithms or scenarios. For calculated variables, algorithms, and scenarios, you will get a breakdown of steps and the variables used. For Mapped variables, the variables used and criteria will be displayed.

Viewing a Report

There are two ways to view a report. The first is to use the **Preview Window** at the bottom portion of the screen. The preview window can be either shown or hidden. When shown, the preview window will update to show the currently selected variable, algorithm or scenario. To hide the preview window, click the Hide Preview Window button.

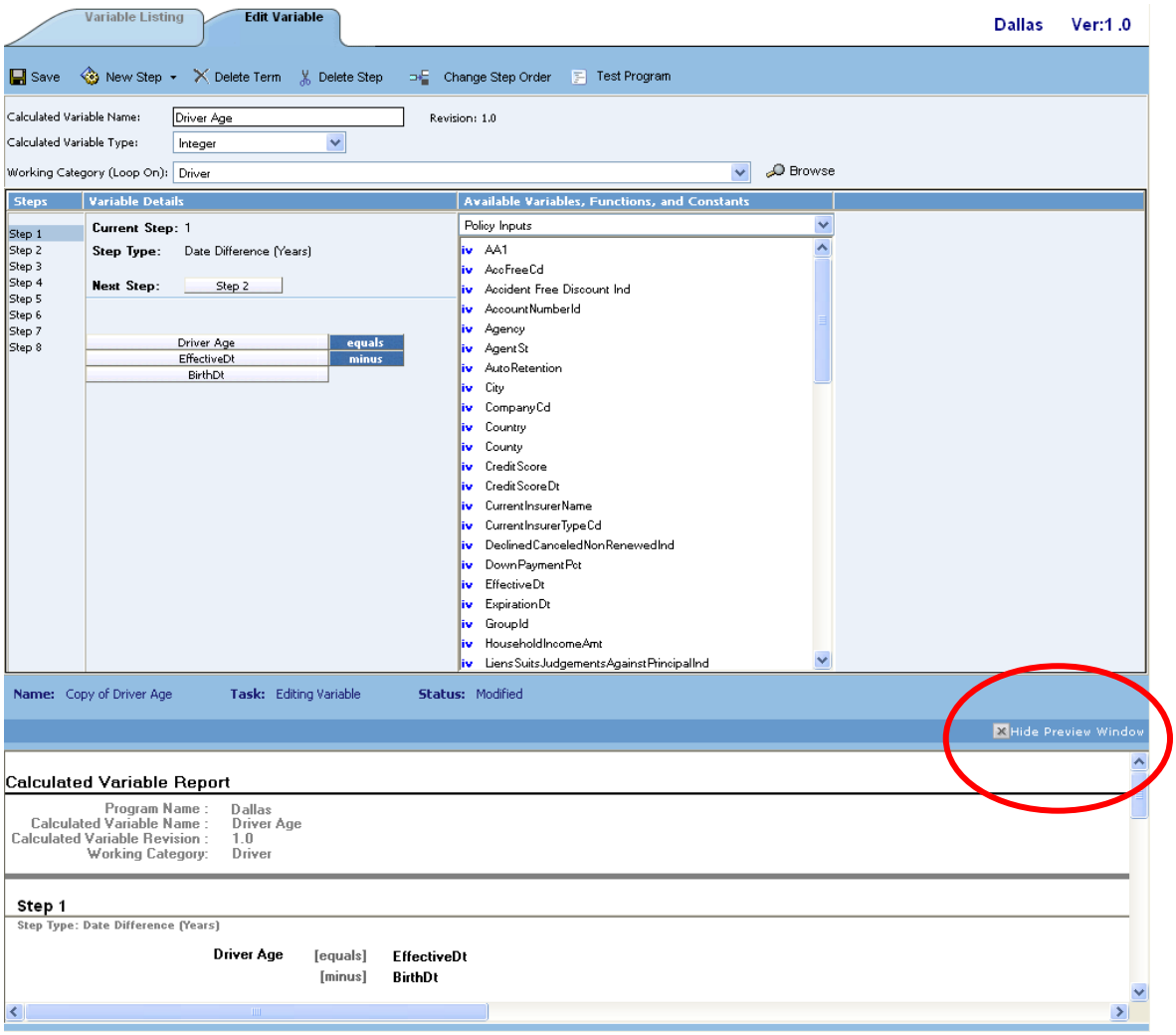


Figure 165 Reports in the Preview Window

The other option is to right click a variable, algorithm or scenario and select **View Quick Report** from the menu.

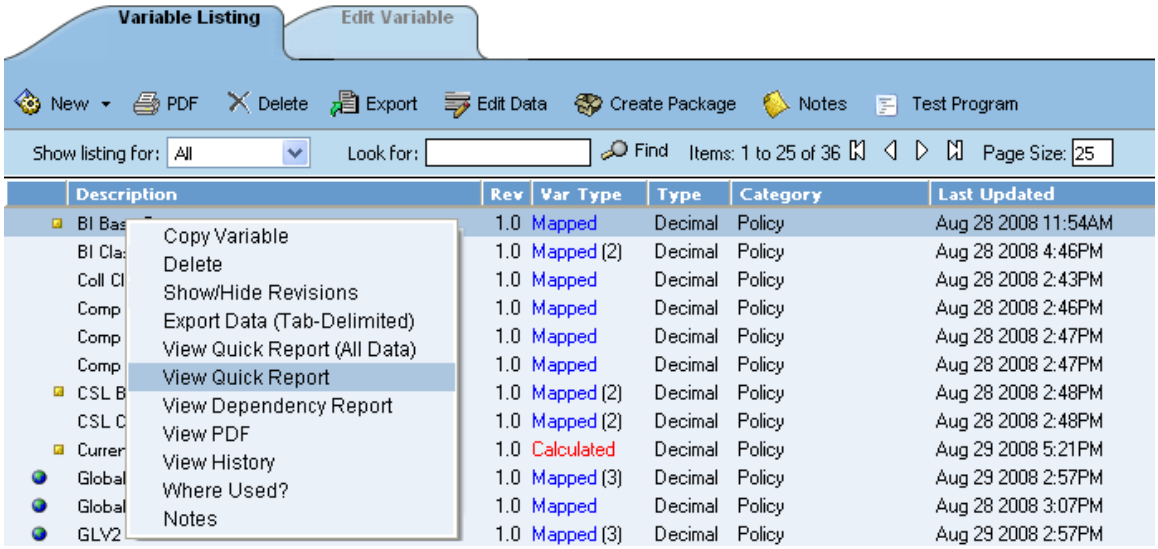


Figure 166 View Report Menu

The report will load in a popup box and may be viewed or printed.

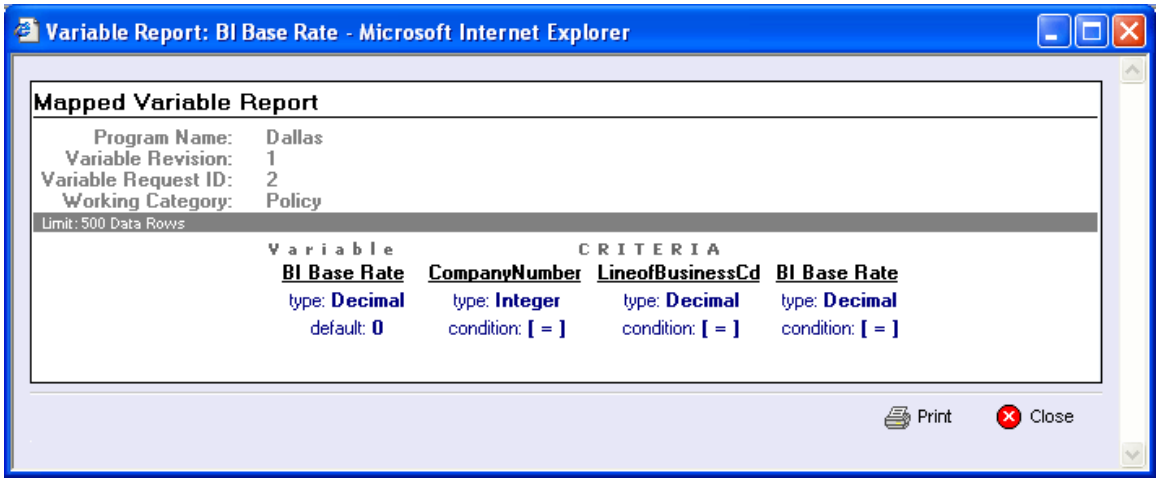


Figure 167 View Report

Where Used

Where Used allows you to see if and where a variable or input is used in a program. The Where Used Report will show all occurrences of the variable or input in other variables, algorithms, or result mapping, in all programs across the subline. You also can click through to further see where the variable or input is used in calculated variables or algorithms. The report will load in a popup window and may be viewed or printed.

Where Used Reports are not available on algorithms or constants.

Viewing a Where Used Report

Where Used is available when you right click a variable and select **Where Used?** from the menu.

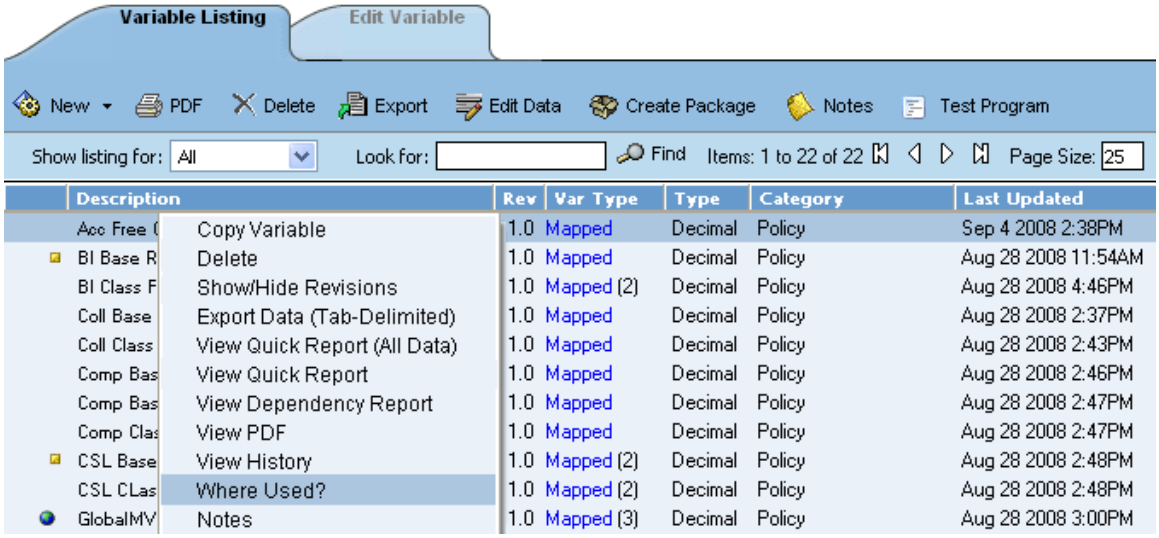


Figure 168 Where Used Menu

Click on any hyperlinked variable or algorithm to see the details. The pathway at the top of the screen displays your current location. Click any link in the pathway to return to that item.

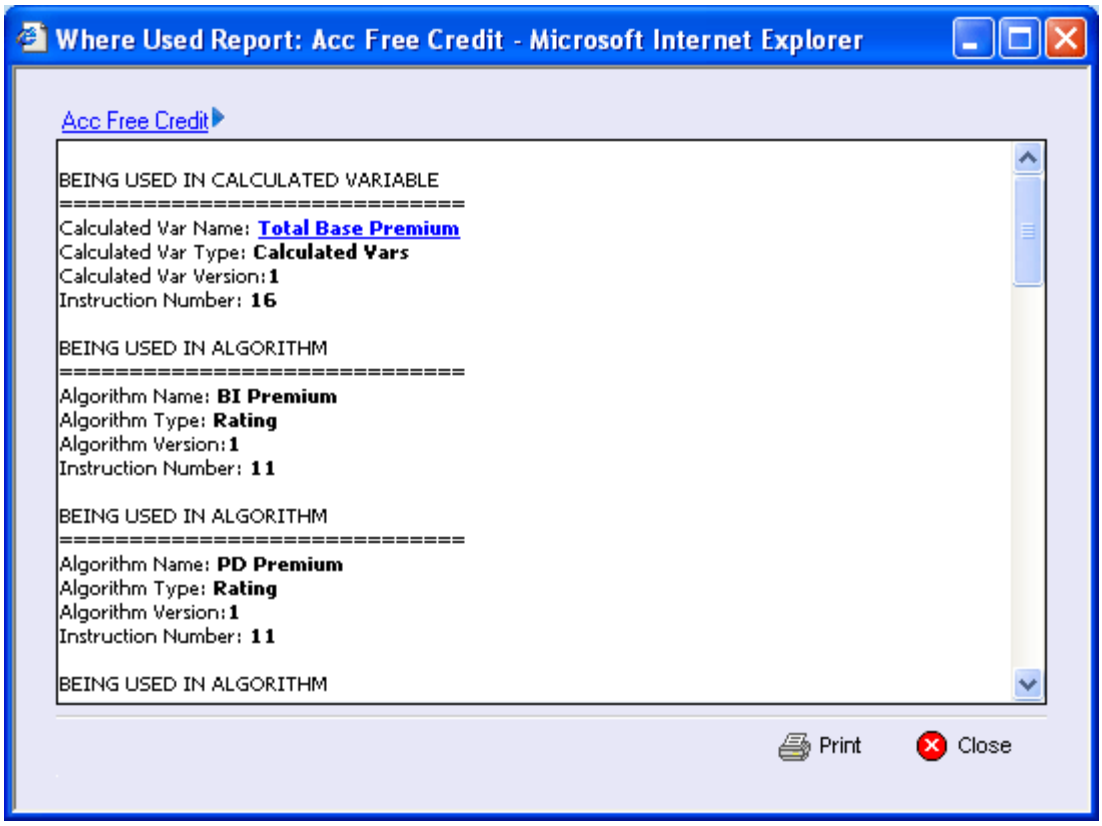


Figure 169 Where Used

View Dependency Report

A dependency report will give you a tree view of all the associated variables and how they relate to one another. Items can be expanded out by clicking the plus sign at the front of the variable. The item you selected will have a quick view report in the lower portion of the screen. This screen will contain the program name, revision and working category. Input variables and result variables will not produce a quick view report. Clicking on an algorithm will produce a report that lists the steps involved.

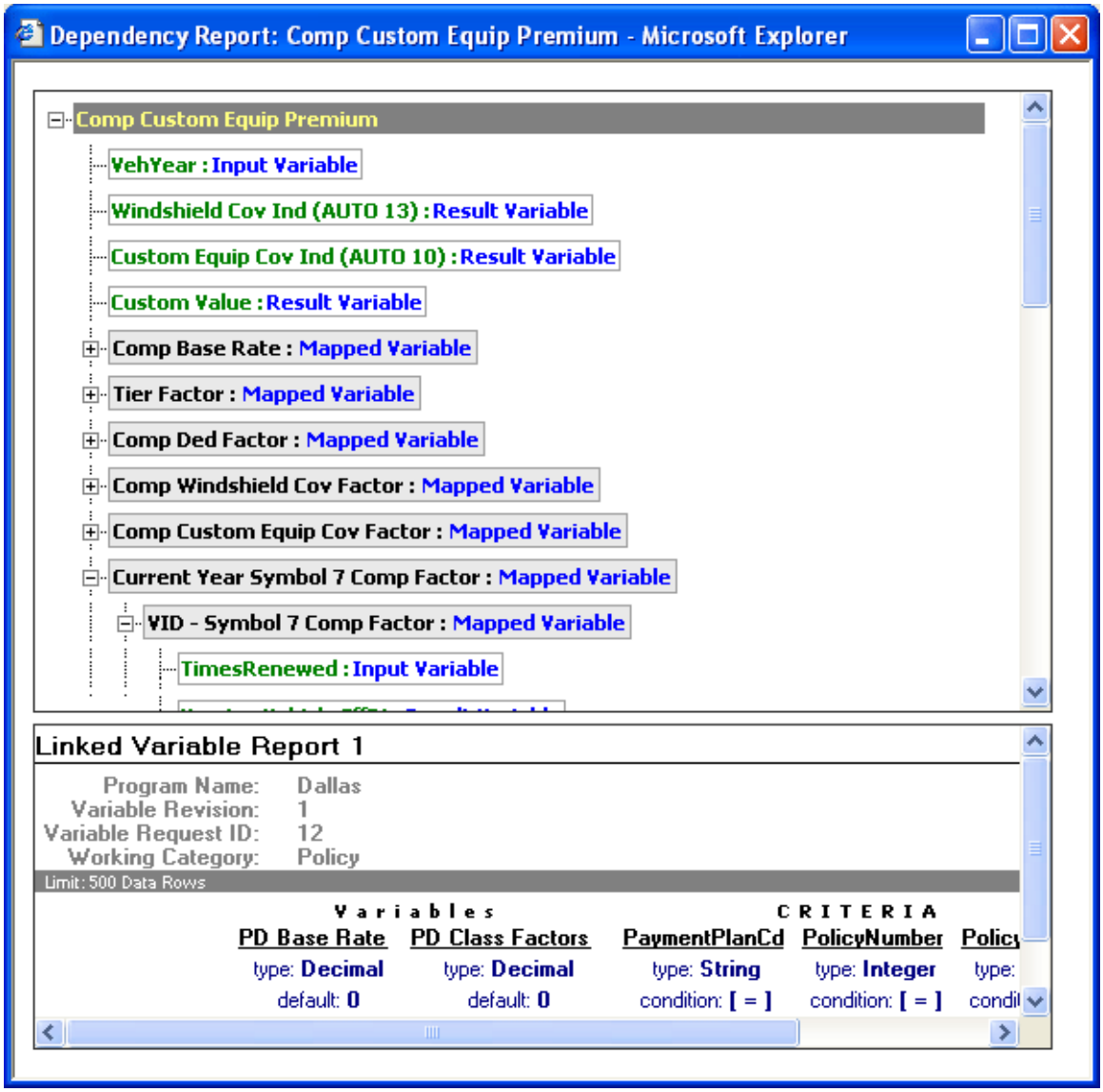


Figure 170 Dependency Report

Yellow text indicates an algorithm. Green text indicates a result or input variable. Variables that are boxed in dark gray indicate a global variable and light gray boxes indicate a local variable.

Dependency reports are available on mapped variables, calculated variables, algorithms and scenarios from the right click menu.

View History

View History will display a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. The top portion of the screen will list the actions taken with the most current listed at the top. To view the details of the action, click the Show Preview Window in the lower right hand corner of the screen and then click on an action you want to view. The details will be displayed in the lower portion of the screen.

If you do not want to view details, click Hide Preview Window to remove the preview window.

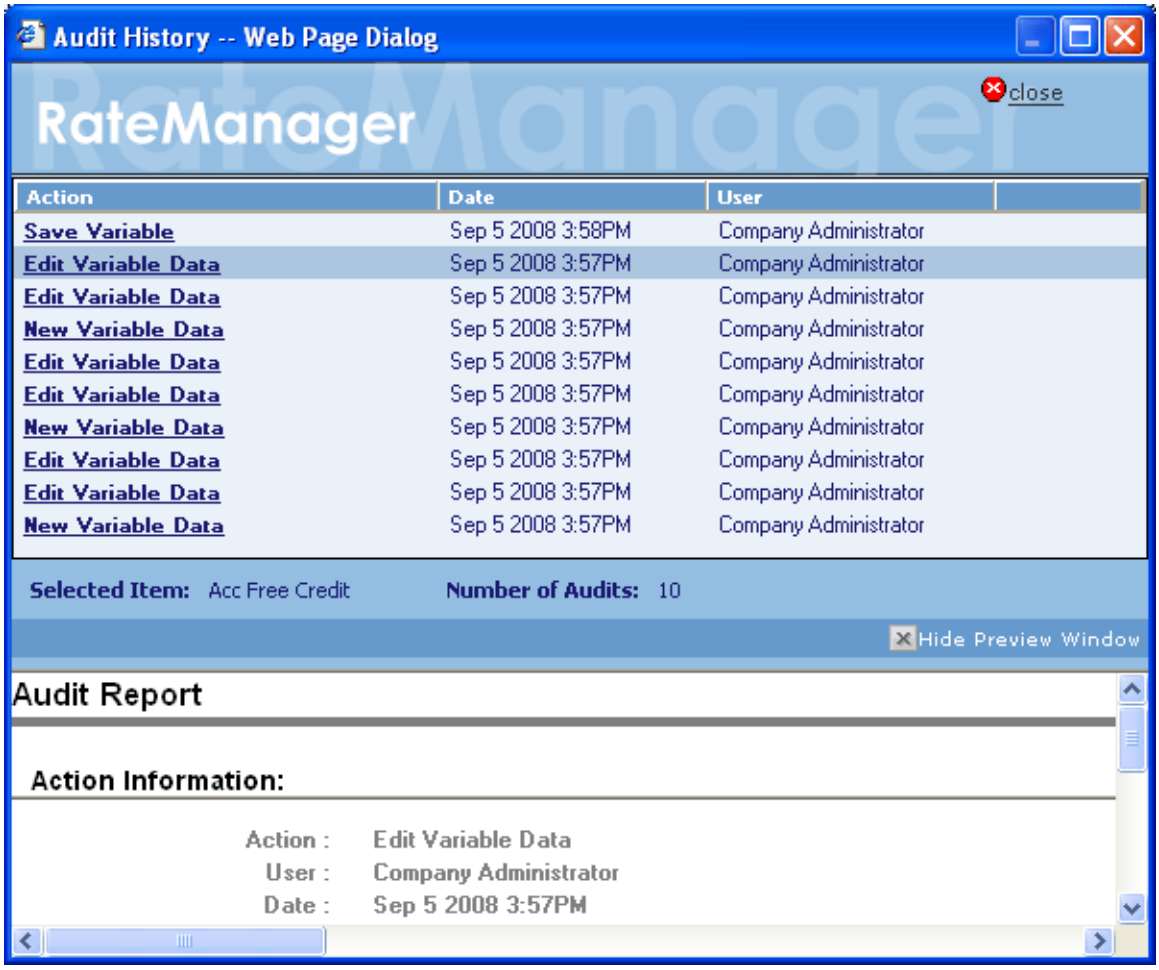


Figure 171 Audit History

View History is an optional feature that must be enabled by the system administrator.

View History is available on mapped and calculated variables, algorithms and scenarios from the right click menu.

9

Step Types

The following step types are available for use in any algorithm, calculated variable, driver assignment algorithm or driver assignment scenario:

- Arithmetic
- DataType Functions:
    - IsNumeric
    - IsAlpha
    - IsDate
- Category Items:
    - Get Category Item
    - Set Category Item
    - Get Ranked Category Item
    - Set Ranked Category Item
- Count Across
- Date Functions:
    - Date Addition
    - Date Difference
- Get Absolute Value
- Get String Length
- If Statement
- Mask
- Ranking:
    - Clear Ranking
    - Rank Across Category
- Sum Across
- Set String/Message
- String Addition

The following step types are available only for use in underwriting algorithms:

- Set Underwriting to Fail

The following step types are available only for use in driver assignment scenarios:

- Re-calculate Vehicle Usage
- Set Principal Operator Variable

For all steps, you can set the next step to be executed. See Setting the Next Step for more information.

Entering in a New Step

New steps can be entered for any unlocked calculated variable, algorithm or driver assignment in a standard program. In a template generated program, any calculated variable, algorithm or driver assignment that is open for editing can have steps added. Whether you are editing an existing program or creating a new one, the process is the same. In the example below, we will add a step to an already existing calculated variable.

Navigate to the Edit Variable Screen

If you are creating a new algorithm or driver assignment, you will navigate to the edit screen.

1. Navigate to the Listing screen for the program that contains the variable you want to add a step to and either double click the variable or select it and click the **Edit Variable** tab. This will open the **Edit Variable** screen.

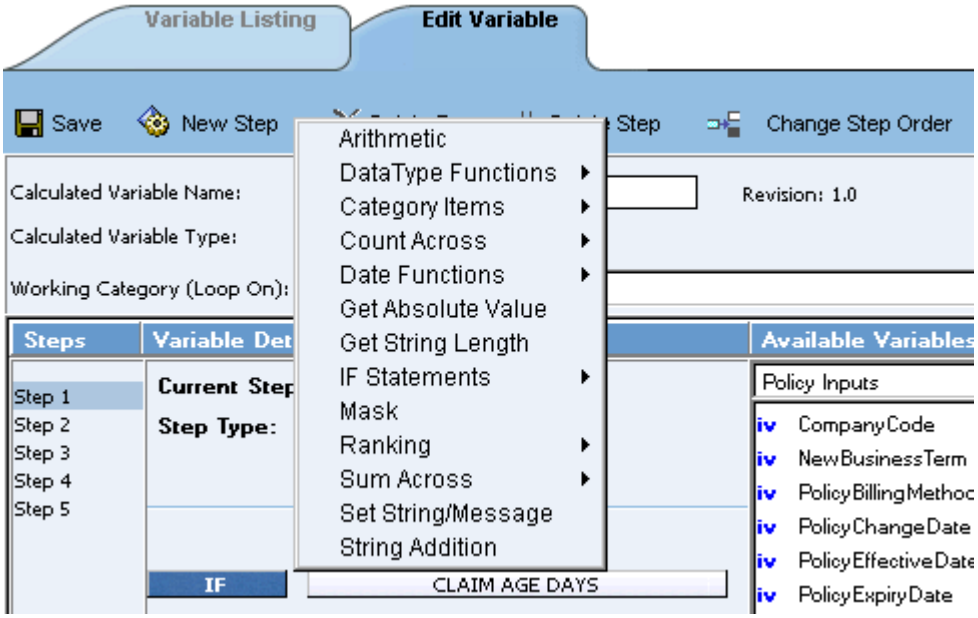


Figure 172 Entering a New Step

2. To add a new step, click New Step and select the type of step you want to add from the drop down menu.

3. The screen below will refresh with the new step parameters. Depending upon the step type, you will have to select the appropriate variables, constants, inputs or for algorithms and drivers assignments, callouts and functions. The value you need to select will be listed on the step. For example, if the step has an “Enter Variable” box, you must choose the variable type from the drop down menu on the right hand side of the screen. The options will be populated underneath. Click the “Enter Variable” box and then double click the corresponding variable you want. The box will refresh with your selected value.

NOTE	For callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made.

4. Continue entering steps until complete.

5. To change the step order, select a step in the **Steps** column, drag it to a new location in the list and drop it.

6. To delete a step, select the step in the **Steps** column and then click Delete Step. You cannot delete the last step from a calculated variable.

7. When you are finished making your entries, click **Save**.

Setting the Next Step

For all steps, you have the ability to set the next step to be executed. This is done by clicking the numbered step box next to **Next Step** and selecting the appropriate step from the popup menu.

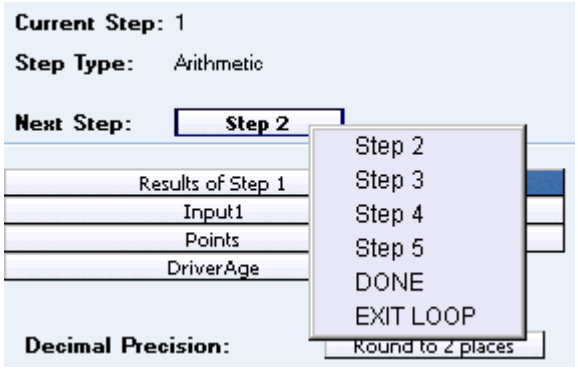


Figure 173 Setting the Next Step

NOTE	In the information below, the word algorithm is used as a generalization. The information applies to all algorithms, calculated variables, driver assignment algorithms and driver assignment scenarios.

Selecting one of the steps (e.g. **Step 3**) will set it as the next step. Selecting **DONE** will exit the algorithm after the step is finished. Selecting **EXIT LOOP** will exit the algorithm after the step is finished and prevent any further iterations of the algorithm from executing.

For IF statements, there are two **Next Step** boxes, labeled as **THEN** and **ELSE**. THEN is used to set the next step to execute if the statement evaluates to TRUE and ELSE is used to set the next step to execute if the statement evaluates to FALSE.

Arithmetic Step

An arithmetic step is used to perform basic arithmetic, addition, subtraction, multiplication and division. It also can be used to perform bitwise OR and bitwise AND operations. For more information, see Arithmetic Operators.

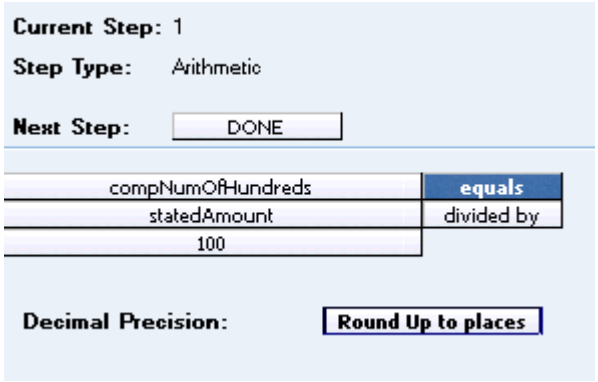


Figure 174 Arithmetic Step

Order of Operations

RateManager does not use the standard arithmetic order of operations to perform calculations. Instead, RateManager performs calculations left-to-right or top-to-bottom.

For example, here is how the standard equation 5 + 2 x 3 would be evaluated using the standard order of operations, versus how it would be evaluated in RateManager:

Standard Order of Operations: 5 + (2 x 3) = 5 + 6 = **11**

RateManager: (5 + 2) x 3 = 7 x 3 = **21**

Adding a New Element

To add a new element, a variable, input, result or constant, to the step, find the item you would like to add from the listing of **Available Variables, Functions and Constants.** Once you have located the correct item, double-click it to add it as the next operand.

You also can replace an existing operand by clicking it once and then double clicking the item you would like to replace it with. This applies to the results of the arithmetic step too.

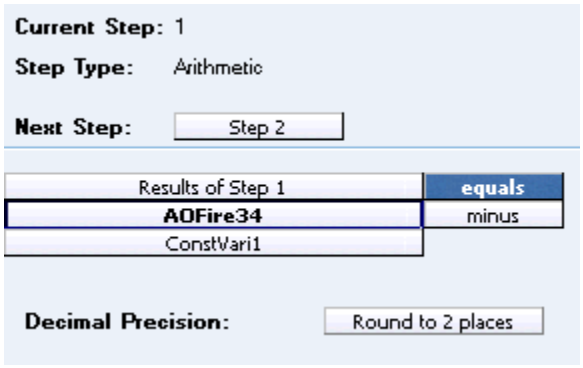


Figure 175 Setting an Arithmetic Step 1

To set the arithmetic operator to be used, click the box next to the item name and select the appropriate operator from the popup menu.

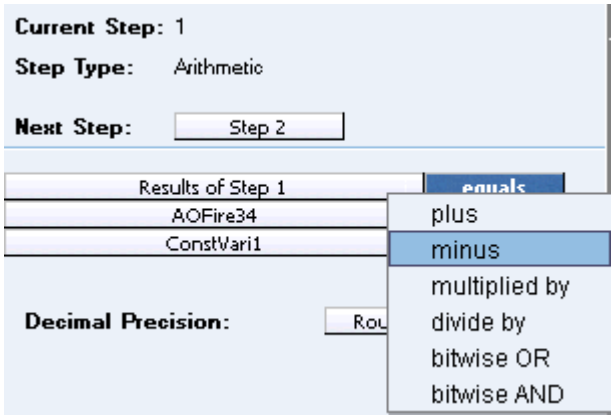


Figure 176 Setting an Arithmetic Step 2

To set the rounding to be used at the end of the step, click the box next to **Decimal Precision** and select the appropriate rounding from the popup menu.

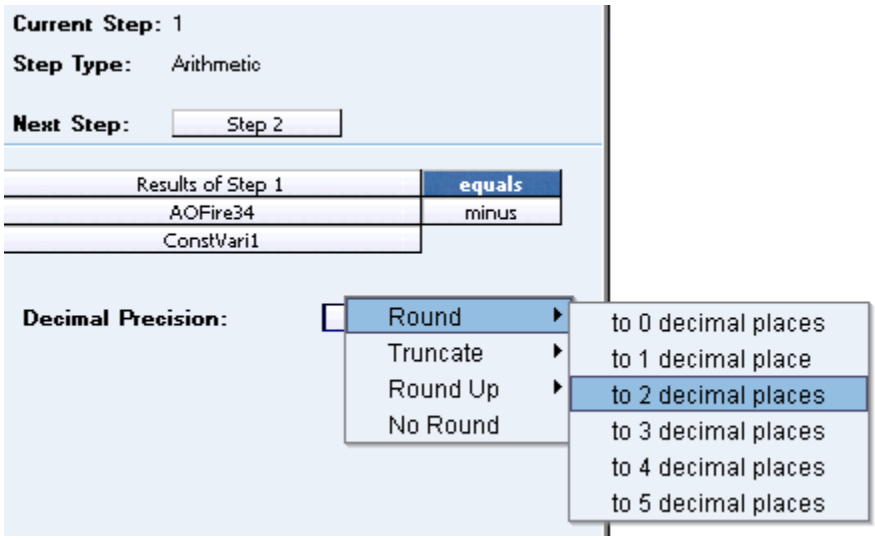


Figure 177 Setting the Rounding

Arithmetic Operators

Arithmetic operators are used in arithmetic steps. The available arithmetic operators are:

+	Plus - Performs a basic addition operation. i.e. 2 + 3 = 5.
-	Minus - Performs a basic subtraction operation, i.e. 5 - 3 = 2.
x	Multiply By - Performs a basic multiplication operation, i.e. 2 x 3 = 6.
/	Divide By - Performs a basic division operation, i.e. 6 / 3 = 2.
|	Bitwise OR - Performs a bitwise OR operation, i.e. 5 | 12 = 13.

Bitwise OR is determined by converting each number to binary form and then performing an OR, bit by bit, as shown below.

5 in binary is:	00000101
12 in binary is:	00001100
So the result is:	00001101 or 13.

Any column that has a 1 in either row has a 1 in the result row.

&	Bitwise AND - Performs a bitwise AND operation, i.e. 5 & 12 = 4.

Bitwise AND is determined by converting each numbers to binary form and then performing an AND, bit by bit, as shown below.

5 in binary is:	00000101
12 in binary is:	00001100
So the result is:	00000100 or 4.

Any column that has a 1 in each row will have a 1 in the result row.

Decimal Precision

At the end of each arithmetic step, the user can set the rounding parameters.

- **Round**: Rounds the number using standard rounding rules. Rounding can be set anywhere between 0 and 5 digits.
- **Truncate**: All or a portion of the decimal will be dropped. Can be set between 0 and 5 digits.
- **Round Up**: Will round the number, or a portion of it, to the next higher number. Can be set between 0 and 5 digits.
- **No Round**: No rounding will occur on the step.

Data Type Functions

Data Type function are an If step that checks if a value is numeric, alphabetic, or a date. There are three available in RateManager:

- IsNumeric
- IsAlpha
- IsDate

IsNumeric Step

The IsNumeric step allows you to check if a variable holds a numeric value.

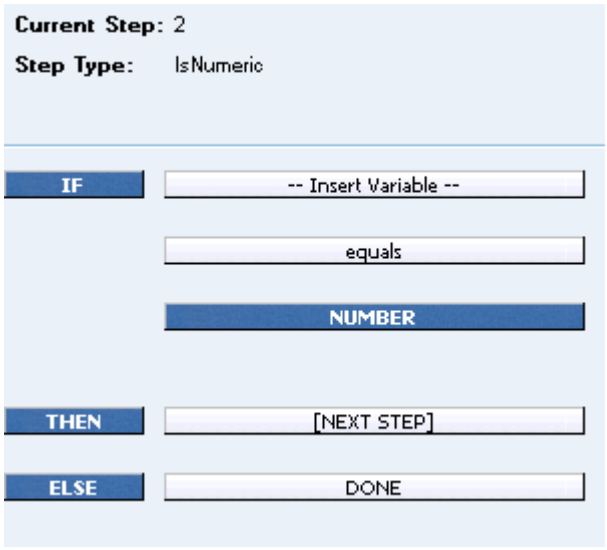


Figure 178 IsNumeric Step

IsAlpha Step

The IsAlpha step allows you to check if a variable holds an alpha character value.

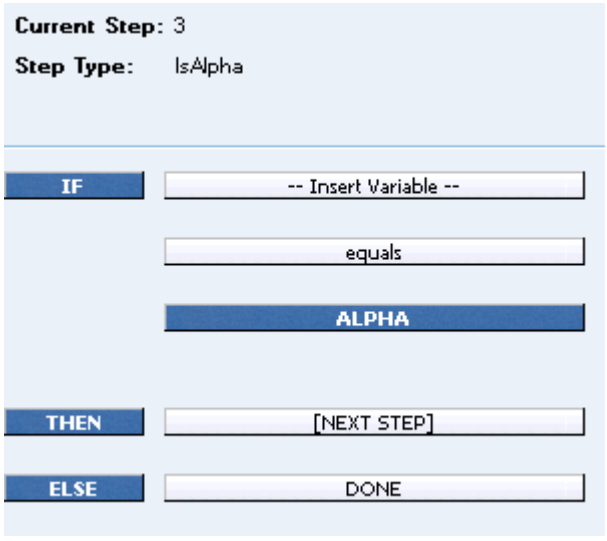


Figure 179 IsAlpha Step

IsDate Step

The IsDate step allows you to check if a variable holds a date value.

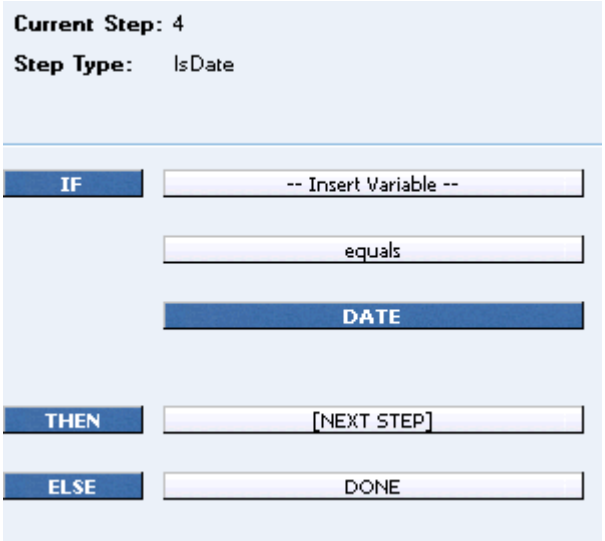


Figure 180 IsDate Step

Category Items

Category Items are used to get or set a specific instance of a variable. There are six Get/Set Category Items:

- Get Category Item (Use Current Path)
- Set Category Item (Use Current Path)
- Get Category Item (All Available)
- Set Category Item (All Available)
- Get Ranked Category Item
- Set Ranked Category Item

Get Category Item Step

A get category item step is used to get a specific instance of a variable. For example, a get category item step could be used to get the first endorsement for each vehicle on an auto policy.

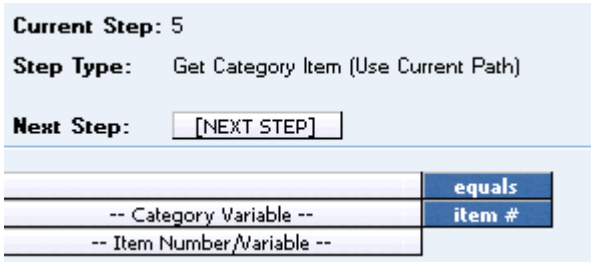


Figure 181 Get Category Step

RateManager provides two types of the get category item step.

- **Get Category Item (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2000
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2002
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/1998
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal

Violation Date: 12/02/2000
Violation Points: 1
</Violation>
<Violation>
Violation Type: Speeding
Violation Date: 01/21/2001
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2003
Violation Points: 2
</Violation>
</Driver>

If a **Get Category Item (Use Current Path)** step, used at the Driver level, is used to get the 2nd violation for each driver.

Driver Second Violation Type [=] Violation Type [Item #] 2

The Driver Second Violation Type would equal "Driving without a license" for Driver #1. For Driver #2, Driver Second Violation Type would be blank, because Driver #2 does not have a second violation. For Driver #3, Driver Second Violation Type would equal "Speeding".

- **Get Category Item (All Available):** Items in a subcategory of the current category are looked at as a whole.

Example

Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

<Driver>
Driver #1
<Violation>
Violation Type: Speeding
Violation Date: 01/04/2000
Violation Points: 2
</Violation>
<Violation>
Violation Type: Driving without a license
Violation Date: 05/30/2002
Violation Points: 1
</Violation>
</Driver>

<Driver>
Driver #2
<Violation>
Violation Type: At fault accident
Violation Date: 09/19/1998
Violation Points: 5
</Violation>
</Driver>

<Driver>
Driver #3
<Violation>
Violation Type: Failure to signal
Violation Date: 12/02/2000
Violation Points: 1
</Violation>
<Violation>
Violation Type: Speeding
Violation Date: 01/21/2001
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2003
Violation Points: 2
</Violation>
</Driver>

If a **Get Category Item (All Available)** step, used at the Policy level, is used to get the 4th violation on the policy.

Policy Fourth Violation Type [=] Violation Type [Item #] 4

The Policy Fourth Violation Type would equal "Failure to signal", because that is the fourth violation on the policy.

Set Category Item Step

A set category item step is used to set a specific instance of a variable. For example, a set category item step could be used to set the first accident type for each driver on an auto policy.

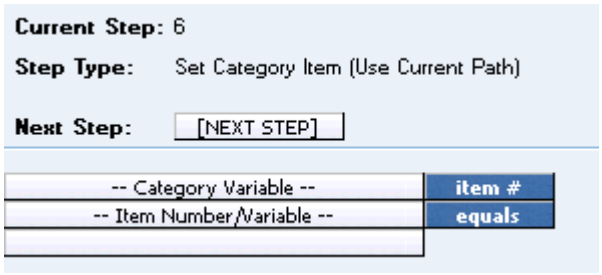


Figure 182 Set Category Item Step

RateManager provides two types of the set category item step.

- **Set Category Item (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

Example

Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

<Driver>
  Driver #1
    <Violation>
      Violation Type: Speeding
      Violation Date: 01/04/2000
      Violation Points: 2
    </Violation>
    <Violation>
      Violation Type: Driving without a license
      Violation Date: 05/30/2002
      Violation Points: 1
    </Violation>
</Driver>

<Driver>
  Driver #2
    <Violation>
      Violation Type: At fault accident
      Violation Date: 09/19/1998
      Violation Points: 5
    </Violation>
</Driver>

<Driver>
  Driver #3
    <Violation>
      Violation Type: Failure to signal
      Violation Date: 12/02/2000
      Violation Points: 1
    </Violation>
    <Violation>
      Violation Type: Speeding
      Violation Date: 01/21/2001
      Violation Points: 2
    </Violation>
    <Violation>
      Violation Type: Running a stop sign
      Violation Date: 11/14/2003
      Violation Points: 2
    </Violation>
</Driver>

If a **Set Category Item (Use Current Path)** step, used at the Driver level, is used to set the points for the 1st violation for each driver.

Violation Points [Item #] 1 [=] 5

The Violation Points would equal 5 for each driver's 1st violation.

- **Set Category Item (All Available):** Items in a subcategory of the current category are looked at as a whole.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2000
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2002
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/1998
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal
  Violation Date: 12/02/2000
  Violation Points: 1
  </Violation>
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/21/2001
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Running a stop sign
  Violation Date: 11/14/2003
  Violation Points: 2
  </Violation>
  </Driver>

  If a **Set Category Item (All Available)** step, used at the Policy level, is used to set the points for the 4th violation on the policy.

  Violation Points [Item #] 4 [=] 5

  Thus, Violation Points would equal 5 for Driver #3's 1st violation, because it is the 4th violation on the policy.

Get Ranked Category Item Step

A get ranked category item step is used to get a specific instance of a variable after the variable has been ranked. For example, if driver accidents have been ranked by accident date, high to low, then a get ranked category item step could be used to get the accident date of the most recent accident for each driver.

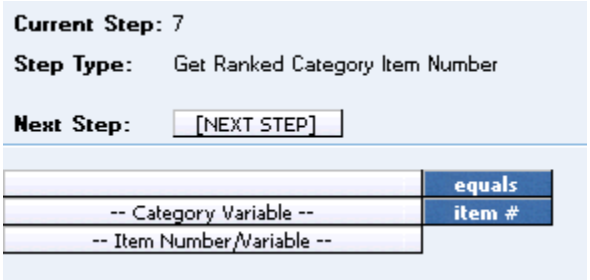


Figure 183 Get Ranked Category

Set Ranked Category Item Step

A set ranked category item step is used to set a specific instance of a variable after the variable has been ranked. For example, if driver accidents have been ranked by claim points, high to low, then a set ranked category item step could be used to set the points for each driver's highest ranked accident to a certain number.

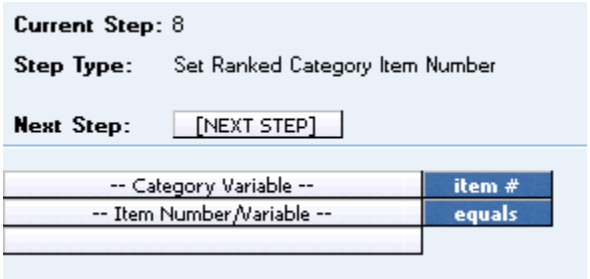


Figure 184 Setting Ranked Category Item

Count Across Category Step

A count across category step is used to determine how many instances of a specific item exist. For example, if you wanted to know how many dwellings were on a policy, you could use a count across step to count the total number of instances of a specific dwelling element (input, variable, result).

There are two available in RateManager:

- Count Across Category (All Available)
- Count Across Category (Use Current Path)

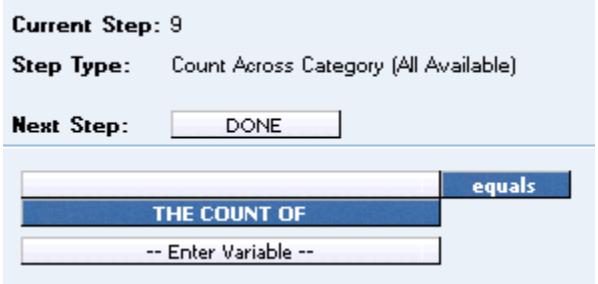


Figure 185 Count Across Category Step

- **Count Across Category (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2000
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2002
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/1998
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal
  Violation Date: 12/02/2000
  Violation Points: 1
  </Violation>
  <Violation>
  Violation Type: Speeding

Violation Date: 01/21/2001
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2003
Violation Points: 2
</Violation>
</Driver>

If a **Count Across Category (Use Current Path)** step, used at the Driver level, is used to determine the number of violations for each driver.

Total Driver Violations [=] The Count (Using Current Path) of Violation Type

The Total Driver Violations would equal 2 for Driver #1, 1 for Driver #2 and 3 for Driver #3.

- **Count Across Category (All Available):** Items in a subcategory of the current category are looked at as a whole.

Example

Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

<Driver>
Driver #1
<Violation>
Violation Type: Speeding
Violation Date: 01/04/2000
Violation Points: 2
</Violation>
<Violation>
Violation Type: Driving without a license
Violation Date: 05/30/2002
Violation Points: 1
</Violation>
</Driver>

<Driver>
Driver #2
<Violation>
Violation Type: At fault accident
Violation Date: 09/19/1998
Violation Points: 5
</Violation>
</Driver>

<Driver>
Driver #3
<Violation>
Violation Type: Failure to signal
Violation Date: 12/02/2000
Violation Points: 1
</Violation>

<Violation>
Violation Type: Speeding
Violation Date: 01/21/2001
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2003
Violation Points: 2
</Violation>
</Driver>

If a **Count Across Category (All Available)** step, used at the Policy level, is used to determine the total number of violations on the policy.

Total Policy Violations [=] The Count (Across All) of Violation Type

Thus, Total Policy Violations would equal 6, because there are six violations on the policy.

Date Functions

A Date Function step is a special date calculation that calculates the difference between two dates in days, months or years, or adds to a date. There are two types of date functions in RateManager:

- Date Addition
- Date Difference
  - Days
  - Months
  - Years

Date Addition Step

A date addition step is used to add a specific number of days, months or years to an existing date.

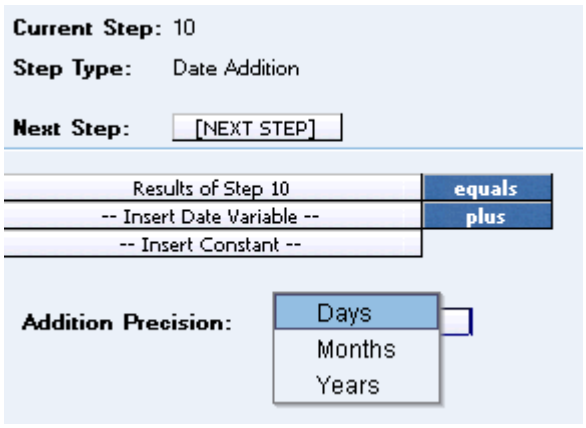


Figure 186 Date Addition

To change the precision used in the addition, click the box next to **Addition Precision** and select the appropriate precision from the popup menu.

Date Difference Step

A date difference step is used to determine the difference between two dates. For example, if you wanted to determine a driver's age, you would use a date difference step and subtract the driver's birth date from the policy effective date.

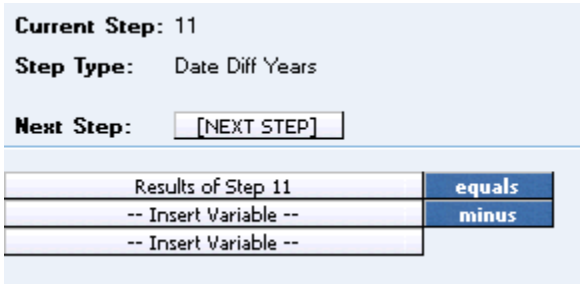


Figure 187 Date Difference

RateManager provides three types of the date difference step.

- **Date Difference (days):** The difference is calculated in terms of how many days have elapsed between the two dates, including leap days. For example, 8/12/2003 - 10/15/1999 would result in 1397, because 1397 days have elapsed between these two dates, including the leap day on 2/29/2000.
- **Date Difference (months):** The difference is calculated in terms of how many whole months have elapsed between the two dates. For example, 8/12/2003 - 10/15/1999 would result in 46, because only 46 whole months have elapsed between these two dates.
- **Date Difference (years):** The difference is calculated in terms of how many whole years have elapsed between the two dates. For example, 8/12/2003 - 10/15/1999 would result in 3, because only 3 whole years have elapsed between these two dates.

Get Absolute Value Step

A get absolute value step gets the absolute value of the selected variable. The absolute value of a number x, commonly written as |x|, is the number x without regard to sign. For example, the absolute value of -8 (negative 8) is 8.

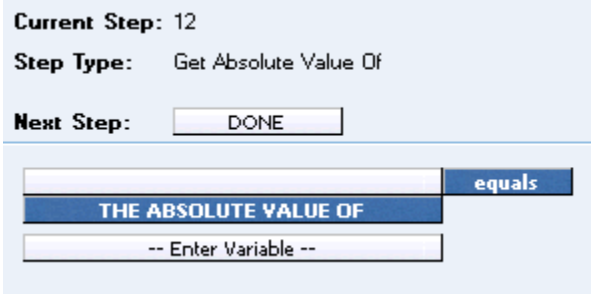


Figure 188 Get Absolute Value Step

Get String Length Step

A Get String Length step gets the number of characters in a specified string. You can use the Get String Length function for any string variable. In Figure 189, the **Results of Step 1** will equal 5, since the constant value of "10000" is 5 characters.

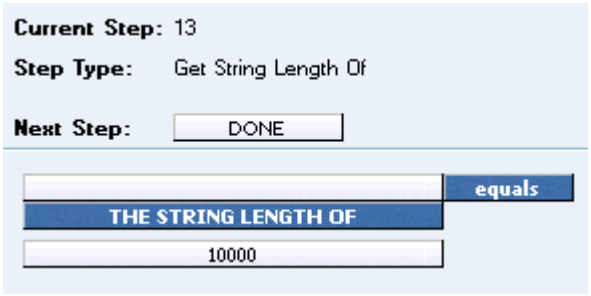


Figure 189 Get String Length Step

If Statements

If statements are used to test criteria and execute certain steps based on whether the statement evaluates to true or false. If Statements can consist of more than one statement. This is called a **Multiple If Statement**. A multiple If Statement allows you to enter a string of statements that either:

- **Contains at least one true statement – OR Condition**
- **Contains all true statements – AND Condition**

OR Condition

A multiple If Statement that contains at least one true statement is done using an **OR** condition. An OR condition will go through the statements until it finds one that is true. When at least one true statement is met, the THEN condition will be processed. If there are no true statements, the ELSE condition will be processed.

For example: If you wanted to execute a statement where Variable A is greater than zero, OR Variable B is less than 1000, OR Variable C [=] 100, then continue, otherwise stop.

IF Variable A [>] O
OR
IF Variable B [<] 1000
OR
IF Variable C [=] 100

(If **any** of these conditions are **true**) THEN Step 2

(If **none** of these conditions are **true**) ELSE Done

AND Condition

A multiple If Statement that contains all true statements is done using an **AND** condition. An AND condition will go through all the statements. If all the statements are true, the THEN condition will be processed. If there are any statements that are not true, the ELSE condition will be processed.

For example: If you wanted to execute a statement where Variable D is greater than zero, AND Variable E is less than 1000, AND Variable F [=] 100, then continue, otherwise stop.

IF Variable D [>] O
AND
IF Variable E [<] 1000
AND
IF Variable F [=] 100

(If **all** of these conditions are **true**) THEN Step 3

(If **any** of these conditions are **NOT true**) ELSE Done

Multiple If Statements must be all OR Conditions or all AND conditions. If you want to run an OR/AND combination, you would have to run an OR Condition step, then an AND Condition step and then use a regular IF Statement.

For example, if you wanted to execute a statement where the RESULT of Step 1 (Variable A is greater than zero, Variable B is greater than 1000 or Variable C is equal to 100), is greater than the RESULT of Step 2 (Variable D is greater than zero, Variable E is greater than 1000 AND Variable F is equal to 100), then you would use the following:

Step 3 would be:

IF Result Step 1 [>] Result Step 2
THEN Step 4
ELSE Done

The assumption is made that Step 1 and Step 2 both completed successfully. If either step failed, the process would have ended and Step 3 would not have executed.

If Statements do not have to be multiple. Multiple IF Statements can be used in Calculated Variables and Algorithms.

There are seven types of If Statements available in RateManager:

- **IF (Normal):** Evaluates to TRUE if the statement is true for the current instance of the element and FALSE otherwise. Can be used for an element in the current category and the current category's parent categories.
- **IF All (All Available):** Evaluates to TRUE if the statement is true for all instances of the element and FALSE otherwise. Can be used for an element in any category.
- **IF No (All Available):** Evaluates to TRUE if the statement is not true for all instances of the element and FALSE otherwise. Can be used for an element in any category.
- **IF Any (All Available):** Evaluates to TRUE if the statement is true for any instance of the element and FALSE otherwise. Can be used for an element in any category.
- **IF All (Use Current Path):** Evaluates to TRUE if the statement is true for all instances of the element and FALSE otherwise. Can be used for an element in the current category, the current category's child categories and the current category's parent categories.
- **IF No (Use Current Path):** Evaluates to TRUE if the statement is not true for all instances of the element and FALSE otherwise. Can be used for an element in the current category, the current category's child categories and the current category's parent categories.
- **IF Any (Use Current Path):** Evaluates to TRUE if the statement is true for any instance of the element and FALSE otherwise. Can be used for an element in the current category, the current category's child categories and the current category's parent categories.

Entering a Multiple IF Statement

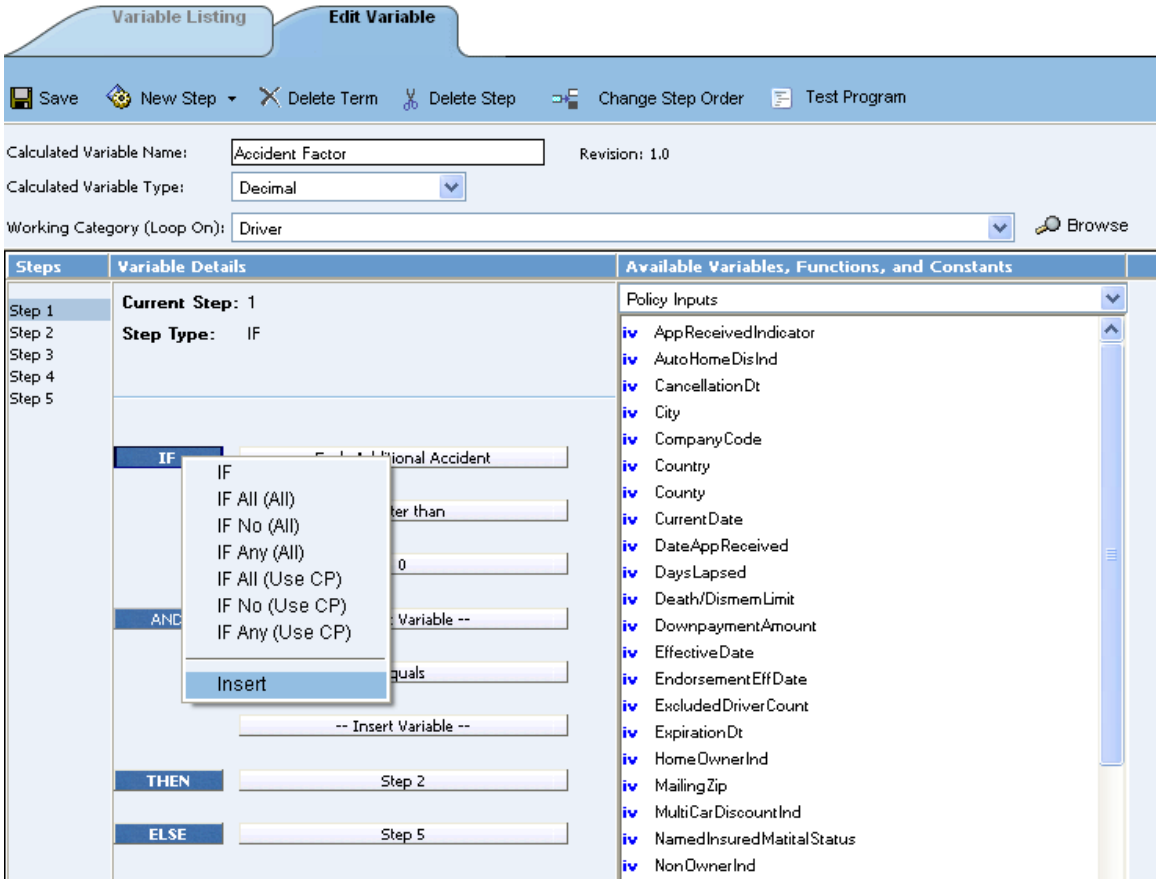


Figure 190 Creating a Multiple If Step

1. Select your New **IF Step Type** from the drop down menu at the top of the screen. The screen will refresh with a standard if statement. Enter in your criteria.

2. Right click on the IF button. A popup menu will be displayed. Click **Insert** to insert another statement. The screen will refresh with another if statement directly underneath the first one. Enter in your criteria.

3. Continue until you have all your statements entered. Complete the THEN and ELSE statements.

Editing a Multiple IF Statement

You can change the comparison commands to either all ANDs or all ORs. To change, right click on the AND or the OR blue box. A popup menu will be displayed. Select the comparison command you want. All comparison commands will be changed to the same type.

The IF statement type at the top of the list will apply to all statements listed. An IF statement can be changed to a different type of IF Statement by clicking the blue IF box IF and selecting a different IF Statement from the popup menu. Whatever you select will apply to all statements listed.

Right clicking the comparison command will also allow you to enter a new statement directly below the selected statement. Right click on the AND or the OR blue box. A popup menu will be displayed. Click **Insert** to insert another statement.

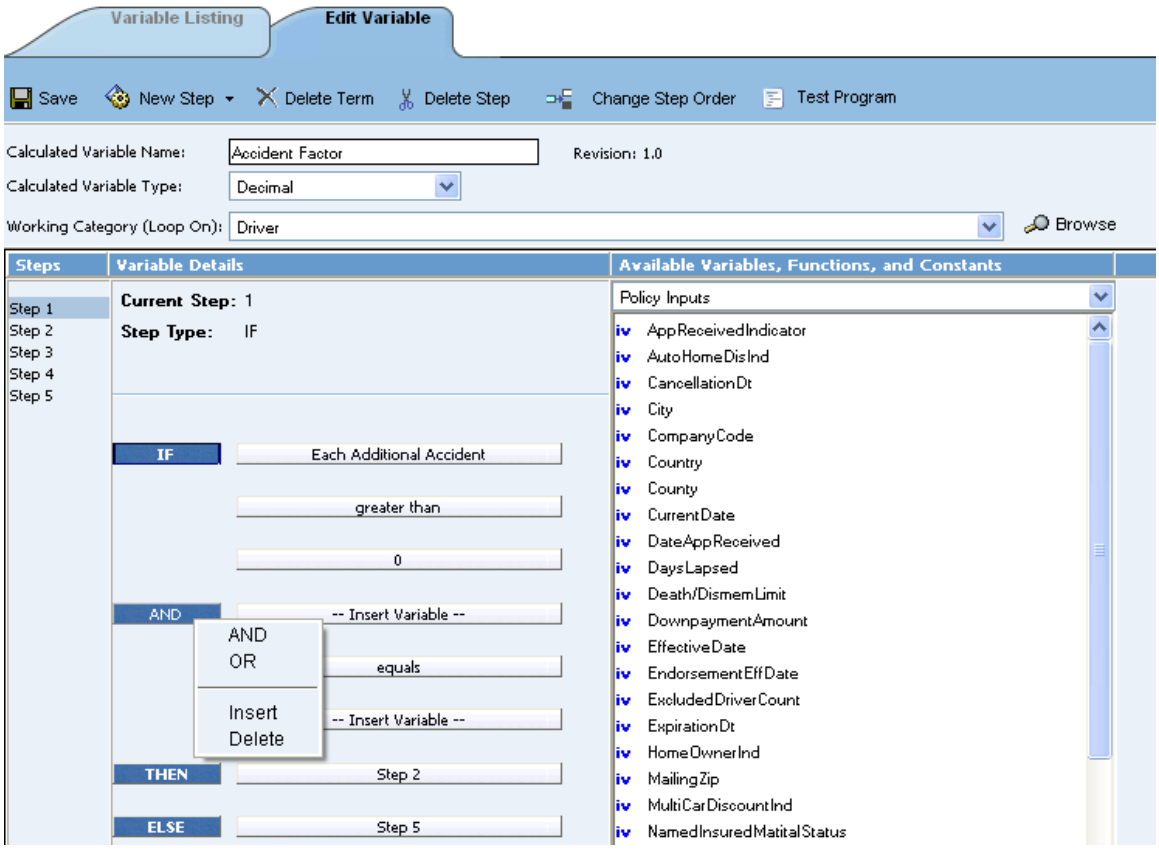


Figure 191 Editing a Multiple If Statement

Deleting a Multiple IF Statement

You can delete a statement you do not need. Right click on the AND or the OR blue box of the statement you want to delete. A popup menu will be displayed. Click **Delete**. The screen will refresh and the statement will be removed.

Comparison Operators

Comparison operators are used in IF steps. The available comparison operators are:

=	Equals
<>	Not Equals
<	Less Than
<=	Less Than Or Equal To
>	Greater Than
>=	Greater Than Or Equal To

Figure 192 Comparison Operators Table

As arithmetic comparisons only can be performed on numbers (integers and decimals), RateManager will limit your options for comparing strings to only those of Equals and Not Equals. An operator may be used to specify a range of numbers by setting the first criteria as Greater Than and the second criteria as Less Than, or to specify an exact match by setting the operator to Equal.

Mask Step

A mask step is used when you want to use a part of a string. For example, if a vehicle's ID number is passed into the system as VEH01, but you only wanted the last two digits, you could use a mask step to store those digits in another element.

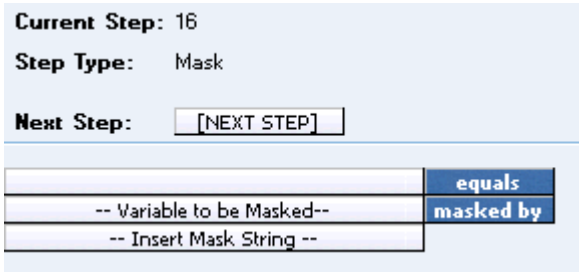


Figure 193 Mask Step

Available Mask Options

Function	Definition	Keystroke(s)
Hold	Holds a character, i.e. keeps the character	~
Remove	Replaces a character with another character	|
Replace	Removes a character Insert adds a character	any character
Insert	Adds a character.	^ + any character

Figure 194 Available Mask Options Table

Examples

Function	Input	Mask	Result
Hold	GA263SX4597	~~~~~	GA263
Remove	VEH01	|||~~	01
Replace	Insbridge	~~~urance	Insurance
Insert	Cat	~^h~^r~	Chart

Figure 195 Mask Option Examples Table

Ranking

A Rank Across category step allows you to rank all instances of a specific element, either highest to lowest or lowest to highest.

There are two types of Ranking Steps:

- **Clear Ranking**
- **Rank Across Category**

RateManager provides four types of the Rank Across Category Step.

- **Rank Across Category (All Available) (Low-to-High):** Allows you to rank elements in any category, lowest to highest.
- **Rank Across Category (High-to-Low):** Allows you to rank elements in the current category, the current category's child categories and the current category's parent categories, highest to lowest.
- **Rank Across Category (Low-to-High):** Allows you to rank elements in the current category, the current category's child categories and the current category's parent categories, lowest to highest.
- **Rank Across Category (All Available) (Low-to-High):** Allows you to rank elements in any category, highest to lowest.

Clear Ranking Step

When ranking a Ranking Step, the system allows for cascading ranking operations. This step breaks the cascading ranking that is inherent when using back-to-back ranking operations. This step should always be used after a ranking step, when cascading is not desired.

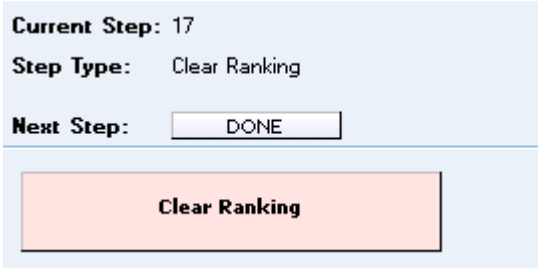


Figure 196 Clear Ranking Step

Rank Across Category Step

A rank across category step allows you to rank all instances of a specific element, either highest to lowest or lowest to highest.

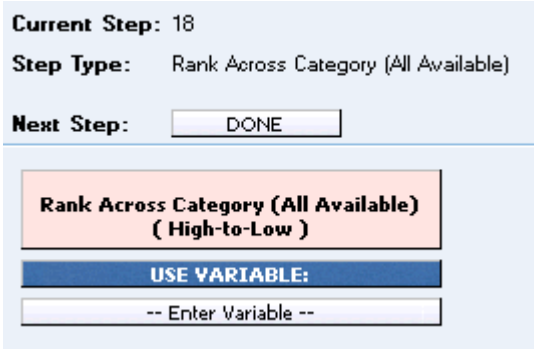


Figure 197 Rank Across Category Step

Sum Across Category Step

A sum across category step is used to determine the sum of all instances of a specific element (input, variable, result). For example, if you had a Total Vehicle Premium for each vehicle on an auto policy, and you wanted to know the total policy premium, you would sum across the Total Vehicle Premium.

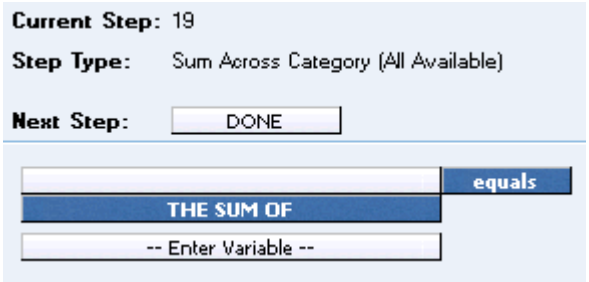


Figure 198 Sum Across Category Step

RateManager provides two types of the Sum Across Category Step.

- **Sum Across Category (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>

Violation Type: Speeding
Violation Date: 01/04/2000
Violation Points: 2
</Violation>
<Violation>
Violation Type: Driving without a license
Violation Date: 05/30/2002
Violation Points: 1
</Violation>
</Driver>

<Driver>
Driver #2
<Violation>
Violation Type: At fault accident
Violation Date: 09/19/1998
Violation Points: 5
</Violation>
</Driver>

<Driver>
Driver #3
<Violation>
Violation Type: Failure to signal
Violation Date: 12/02/2000
Violation Points: 1
</Violation>
<Violation>
Violation Type: Speeding
Violation Date: 01/21/2001
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2003
Violation Points: 2
</Violation>
</Driver>

If a **Sum Across Category (Use Current Path)** step, used at the Driver level, is used to determine the number of violation points for each driver.

Total Driver Violation Points [=] The Sum (Using Current Path) of Violation Points

The Total Driver Violation Points would equal 3 for Driver #1, 5 for Driver #2 and 5 for Driver #3.

- **Sum Across Category (All Available):** Items in a subcategory of the current category are looked at as a whole.

Example

Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

<Driver>
Driver #1
<Violation>
Violation Type: Speeding
Violation Date: 01/04/2000
Violation Points: 2
</Violation>
<Violation>
Violation Type: Driving without a license
Violation Date: 05/30/2002
Violation Points: 1
</Violation>
</Driver>

<Driver>
Driver #2
<Violation>
Violation Type: At fault accident
Violation Date: 09/19/1998
Violation Points: 5
</Violation>
</Driver>

<Driver>
Driver #3
<Violation>
Violation Type: Failure to signal
Violation Date: 12/02/2000
Violation Points: 1
</Violation>
<Violation>
Violation Type: Speeding
Violation Date: 01/21/2001
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2003
Violation Points: 2
</Violation>
</Driver>

If a **Sum Across Category (All Available)** step, used at the Policy level, is used to determine the total number of violation points on the policy.

Total Policy Violation Points [=] The Sum (Across All) of Violation Points

The Total Policy Violation Points would equal 13.

Set String/Message Step

A set string/message step is used when you want a specific message stored in a string. For example, if you wanted to output the message "Too many claims in last three years." if a policy fails a specific underwriting rule, you would use a set string/message step.

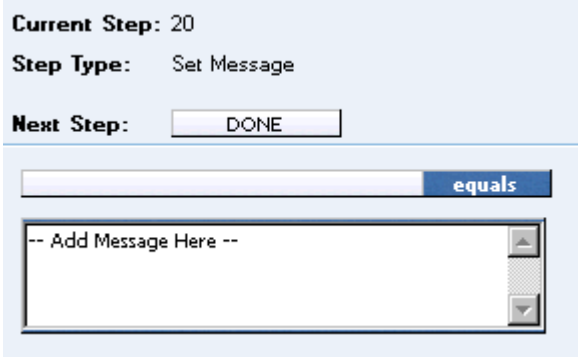


Figure 199 Set String/Message Step

The message can contain up to 4000 characters but no special characters. See Restrictions for more information.

String Addition Step

A string addition step is used to concatenate two or more strings or character together. For example, using string addition, the string "Ins" plus the string "bridge" would result in "Insbridge".

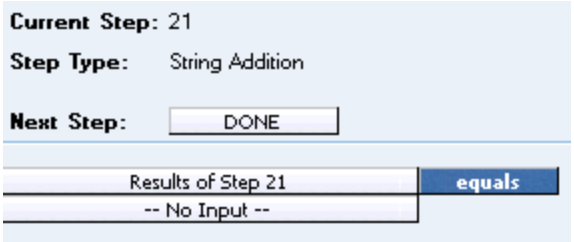


Figure 200 String Addition Step

Set Underwriting to Fail Step

A set underwriting to fail step is used in an algorithm when you want to halt rating because a policy does not meet an underwriting requirement.

For example, if, in the home line of business, you do not insure homes that are valued at more than $500,000, you could use an underwriting algorithm to check the value of the home and set underwriting to fail if it is greater than 500000. The algorithm could be placed at the beginning of the program sequence and, if it fails, processing time isn't wasted calculating premiums for a policy that won't be written.

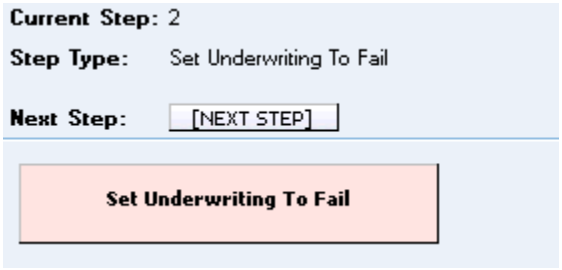


Figure 201 Setting Underwriting to Fail Step

Set Principal Operator Variable

A set principal operator variable needs to be called prior to using selected assignment functions, **Assign All Vehs by Princ Op (Drvs NONEXCLUSIVE)** and **Assign Unassigned Vehs by Princ Op (Drvs EXCLUSIVE)**. This step will set the principal operator indicator needed by the functions.

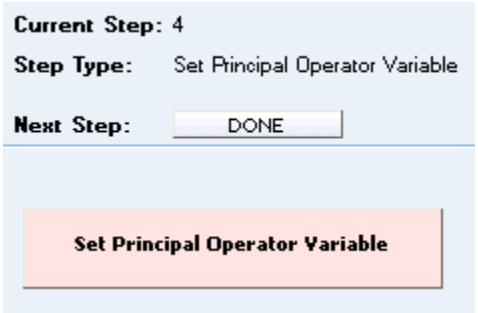


Figure 202 Set Principal Operator Variable

Re-calculate Vehicle Usage Step

The re-calculate vehicle usage step is used when you want change the vehicle usage option for a driver assignment scenario.

For example, suppose that at the beginning of a driver assignment scenario you need the vehicle usage option set to Vehicle Usage on Drivers, but at the end you need it set to Driver Usage on Vehicles. You would set the vehicle usage option for the scenario to Vehicle Usage on Drivers. When you need the vehicle usage option changed to Driver Usage on Vehicles, you would use the re-calculate vehicle usage step.

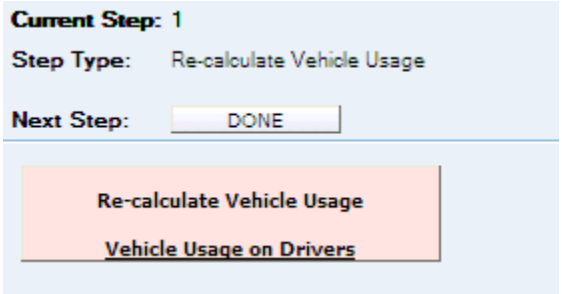


Figure 203 Re-calculate Vehicle Usage Step

RateManager provides four types of the re-calculate vehicle usage step. For more specific information on these options, see the driver assignment topic Vehicle Usage Options.

- **Vehicle Usage by Vehicle Order (Input: 299):** Vehicle usage is designated as the actual vehicle a driver principally operates.
- **Vehicle Usage on Drivers:** Vehicle usage is designated as a percentage a driver operates each vehicle.
- **Driver Usage on Vehicles:** Vehicle usage is designated as a percentage a vehicle is operated by each driver.
- **Vehicle Usage by VehicleID (Inputs: 299/368):** Vehicle usage is designated as the actual vehicle a driver principally operates, based on the vehicle number specified in the input file.

10

Introduction to Algorithms

Algorithms in RateManager are similar to calculated variables in that they allow multiple steps to be used in determining a value. Algorithms are different, however, in that the user has the ability to sequence algorithms to run in the order desired. Variables are automatically sequenced by the system to run when needed. Algorithms are most commonly used in determining a premium or checking an underwriting condition. RateManager allows you to create two different kinds of algorithms, Normal Rating Algorithms and Underwriting Algorithms.

- **Normal Rating Algorithms** are mainly used for determining premiums, but with RateManager's ability to set the sequence in which the algorithms are run, they can be utilized to create a result for differences in limits being passed vs. rated, tier assignments, etc.

- **Underwriting Algorithms** are used to ensure underwriting rules have been met, prior to rating a policy, thus saving valuable execution time. Underwriting algorithms are flexible and can be implemented separately per tier or combined using a tiered structure. Messages can be set to output as a result, with or without the policy being set to fail on the rule. Underwriting can be designed to fail on the first rule or fail on all that may be applicable, allowing you to see all of the messages associated with that applicant.

NOTE	For the purposes of this manual, an algorithm will be shown like this: Algorithm.

Algorithms can be created by the user or brought in from a template. Algorithms that are user created will be open for editing, copying, creating new revisions and deletion if they are not locked. Algorithms that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New algorithms can be added to a template and new revisions can be created. These new algorithms will be open for editing, copying, creating new revisions or deletion, unless the program version is locked.

Algorithm Listing Screen

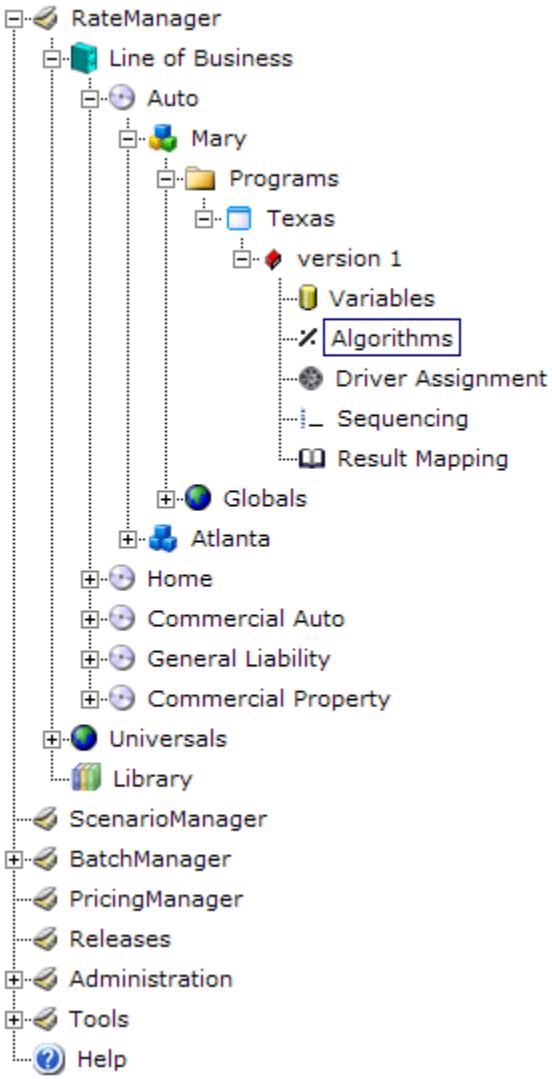
The **Algorithm Listing** shows all algorithms, either normal rating or underwriting, that have been created for a program. In addition, the **Algorithm Listing** shows the revision number, type and working category of the algorithms. It also allows you to:

- Create a new algorithm
- Editing an algorithm
- Create a new algorithm revision
- Change the active revision of an algorithm
- Copy an algorithm

- Delete an algorithm
- Delete an algorithm revision
- Create a Package – See Introduction to Packaging
- Test a Program – See Introduction to Test Case Editor
- View a Quick Report – See View Quick Report
- View Dependency Report – See View Dependency Report
- View History – See View History
- Enter a Note – See Notes

Navigate to the Algorithm Listing

1. From the menu tree, select the line of business, subline, program and version that contains the algorithms you want to see and then click **Algorithms**.



2. This will open the **Algorithm Listing**.

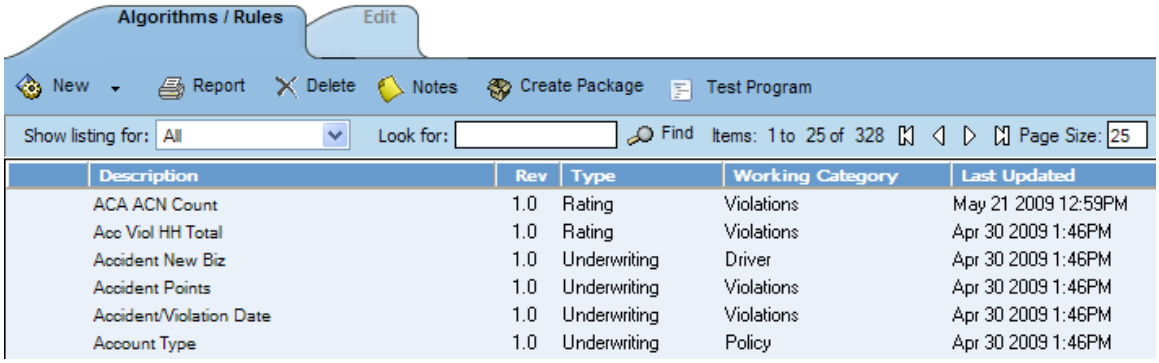


Figure 204 Algorithm Listing Screen

Navigation Bar

Edit Tab: Used to navigate to the Edit Algorithm screen for the currently selected algorithm. You can also double-click an algorithm to edit it.

New: Used to create a new algorithm.

Report: Generates a Quick Report showing all the steps in the algorithm. See View Quick Report for more information.

Delete: Removes the selected algorithm from the program. If the algorithm is being used in the Sequence, you will receive an error message.

Notes: Allows you to enter, edit and view notes to the algorithm.

Create Package: Packages the program for rating and testing. See Introduction to Packaging for more information.

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.

Show Listing For: Allows you to filter the type of algorithms shown.

- **All** will show all algorithms.
- **All Used** will show all algorithms that are currently being used in the Sequence.
- **Normal Rating** will show all normal rating algorithms.
- **Underwriting Rule** will show all underwriting algorithms.

Look For: Allows you to narrow the list of algorithms. To do this, type in a part or the entire name you are looking for and click Find. To re-show all the algorithms, clear this box and select Find.

Page Size: Allows the user to customize the number of algorithms displayed per page and move back and forth between pages. Also displays the total number of algorithms that match the criteria in both the Show Listing For box and the Look For box.

	Move to the first page
	Move back one page
	Move forward one page
	Move to the last page

Column Sorting: You can sort algorithms by individual column headers. The default view is alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Algorithm Listing

The Algorithm Listing contains a list of all algorithms in the program, sorted alphabetically. A globe icon indicates the algorithm is a global algorithm. See Global Algorithms for more information.

Description: Name of the algorithm.

Rev: Shows which revision of the algorithm is used by the current program version.

Type: Displays the type of algorithm. i.e. Rating or Underwriting.

Working Category: Displays the working category of the algorithm.

Last Updated: Time stamp of the last time the algorithm was saved.

Creating a New Algorithm

Algorithms can be template generated or created by you. Template generated algorithms will be grayed out and locked. They are not open for editing but can be copied.

1. Navigate to the **Algorithm Listing** screen for the program you want to create a new algorithm.
2. Select New from the menu bar and then select the type of algorithm you would like to create, either **Normal Rating** or **Underwriting**. This will place you on the Edit Algorithm screen.

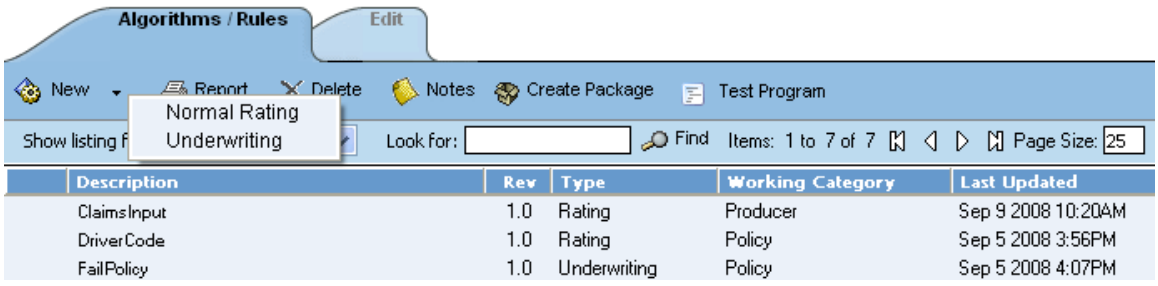


Figure 205 Creating a New Algorithm

The same functionality available when creating rating algorithms is available when creating underwriting algorithms. Underwriting algorithms have one additional step type available; **Set Underwriting to Fail**. During run time, if the policy hits this step in the underwriting algorithm, rating will stop for that specific policy. The remainder of the current algorithm will be processed, but no other algorithms or premiums will be calculated.

The advantage of using the **Set Underwriting to Fail** step is when there are some “hard and fast” underwriting rules that, if failed, will cause the policy to not be written under any circumstances. The user has the ability to have these underwriting rules run at the very beginning of the program. Thus, if the rule does fail, processing time is not wasted in calculating premiums for a policy that will not be written.

Results from Algorithms

Algorithms set the value of result variables. Result variables are a special type of global variable, and are available across the subline. Unlike global calculated and mapped variables, result variables can be used in local algorithms. Result variables are typically premium totals and underwriting messages that are specified as output in the Result Mapping. Result variables are not instantiated, so if their value is not set by an algorithm, it will remain null. Two reasons to use algorithms set result variables include:

Example 1: Multiple result variables from a single algorithm

BI Premium can be set and Monthly BI Premium can be set, which would divide the BI Premium by Term Duration.

Example 2: Multiple algorithms setting a single result variable

BI Premium can be set by both Private Passenger BI Algorithm and Motorcycle BI Algorithm, depending on vehicle type.

Edit Algorithm Screen

The **Edit Algorithm** screen allows you to change information about an algorithm such as the name, working category and steps.

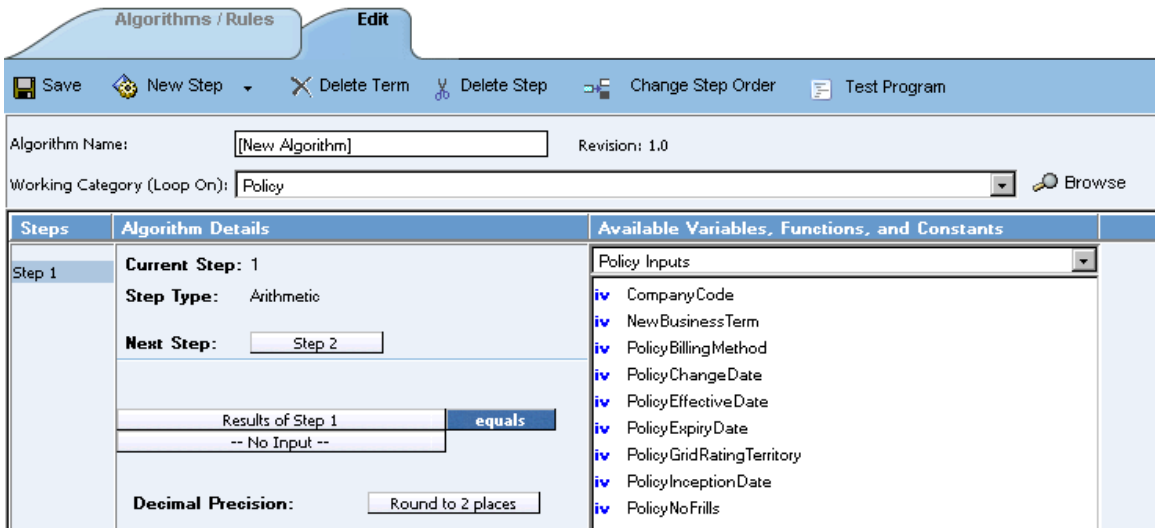


Figure 206 Editing an Algorithm

Navigation Bar

Algorithms/Rules Tab: Used to go back to the Algorithm Listing screen.

Save: Saves the current algorithm.

New Step: Creates a new step in the algorithm. For more information, see Step Types.

Delete Term: Deletes the currently selected term from a step in an algorithm.

Delete Step: Deletes the currently selected step. You cannot delete the last step in an algorithm.

Change Step Order: Allows users to change the order of the steps without using the drop and drag feature.

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.

Algorithm Name & Category

Algorithm Name: Entry for what you want the algorithm to be called. Alphanumeric characters are permitted, but no special symbols (ex: &, *, ", +, @, etc).

Working Category: The working category of the algorithm.

Algorithm Details

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Algorithm Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set via a drop down listing by clicking on the text box next to **Decimal Precision**. You can select a decimal precision from 0 to 5 digits.

Available Variables, Functions and Constants Selection Box: Drop down selection of available inputs, variables, results, constants and callouts sorted by category. On Policy inputs, you will be able to add a new input variable without leaving the Edit screen. On Result inputs, you will be able to add a new result variable without leaving the Edit screen. On Constants, you will be able to enter in a custom value constant without leaving the edit screen.

Editing an Algorithm

Editing an algorithm allows you to change information about the algorithm such as name, working category and steps. Algorithms that are grayed out or locked cannot be edited. Template generated algorithms that are using revision 1 are not open for editing. If you want to edit a template generated algorithm, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed.

To Edit an Algorithm

1. Navigate to the **Edit Algorithm** screen for the program that contains the algorithm you want to edit.

2. Find the algorithm you want to edit and either double-click it or select it and click the **Edit** tab. This will open the **Edit Algorithm** screen.

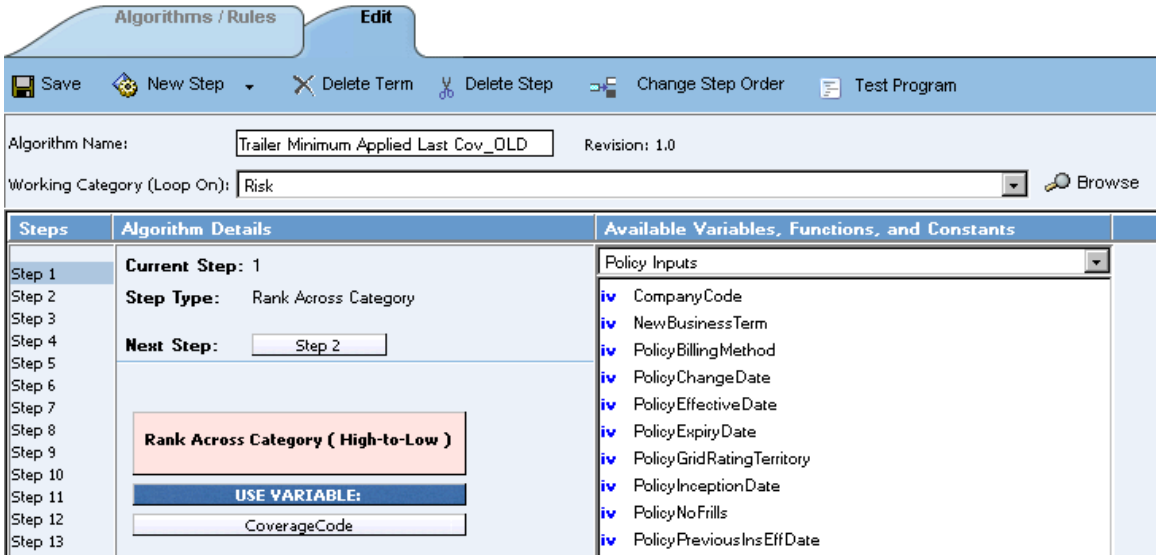
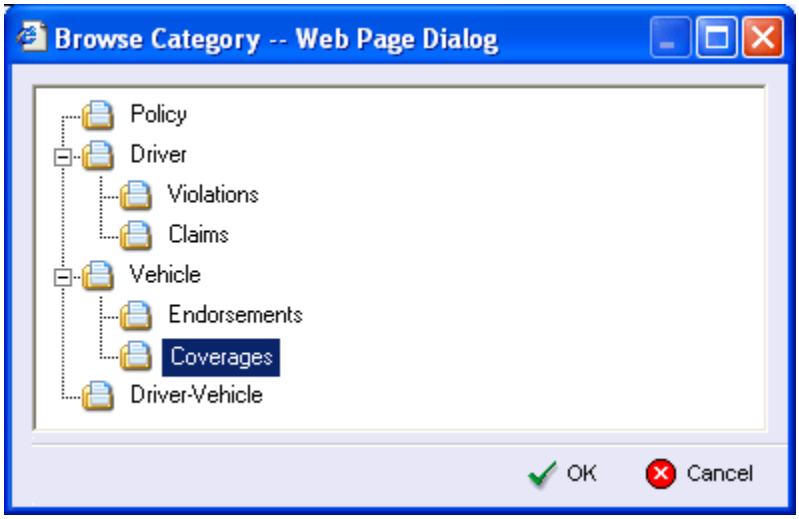


Figure 207 Editing an Algorithm

3. Enter a name for the algorithm and choose a working category.

NOTE	If the category is not fully visible in the text box, hover your cursor over the text box and the complete category name will be displayed in an information box.

You can select the working category from the drop down menu or you can browse for a working category by clicking the Browse button. This will bring up the Browse Category popup.



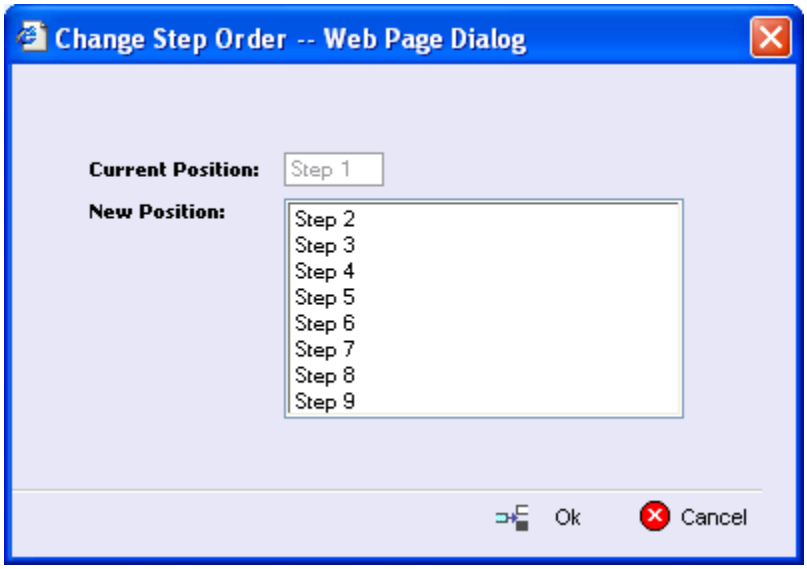
From here you can navigate to the Category you want. Once you have selected the category, click **OK**. The category will auto fill in the working category section.

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

4. To add a new step to the algorithm, click New Step and select the type of step you want to add. The screen below will refresh with the new step parameters. Depending upon the step type, you will have to select the appropriate variables, functions, constants or inputs. The value you need to select will be listed on the step. For example, if the step has an “Enter Variable” box, you must choose the variable type from the drop down menu on the right hand side of the screen. The options will be populated underneath. Click the “Enter Variable” box and then double-click the corresponding variable you want. The box will refresh with your selected value. For more information on the types of steps, see Step Types.

5. To change the step order, you have two options:

    a. Select a step in the **Steps** column, drag it to a new location in the list and drop it.
    b. Select the step you want to move and click the Change Step Order button. A separate screen will be displayed.



    c. The current step position will be displayed at the top of the screen. Select where you want the step to be placed.
    d. Click **OK**. You will be returned to the edit algorithm screen. Your step should be placed where you chose.

6. To delete a step, select the step in the **Steps** column and then click Delete Step. You cannot delete the last step from an algorithm.

7. When you are finished making changes, click Save.

Adding an Input Variable, a Result Variable or a Custom Value Constant

A new input variable, result variable or custom value constant can be created while entering or editing an algorithm, without leaving the Edit screen.

- To add an **Input Variable** – See Adding an Input Variable
- To add a **Custom Value Constant** – See Adding a Custom Value Constant
- To add a **Result Variable** – See Adding a Result Variable

Adding a Result Variable

A new result variable can be created while entering or editing an algorithm without leaving the Edit screen. The category of the new variable cannot be changed here but can be edited on the Global Variable Listing screen, if needed. If the new variable needs to be in another category, you must leave the Edit screen and create it in the Global Variable Listing screen. For the auto line of business, you will be able to add violation inputs and driver inputs as well.

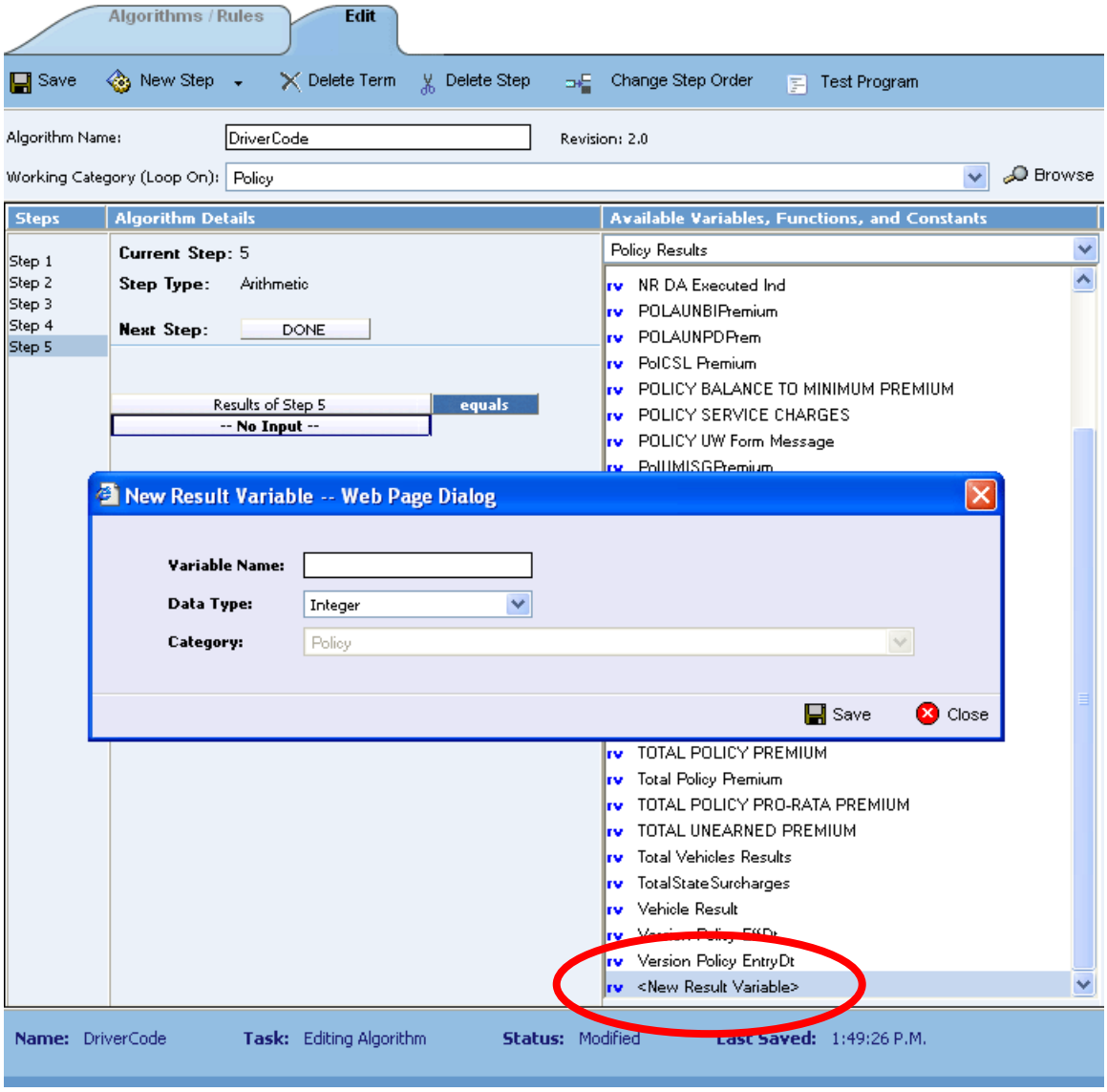


Figure 208 Adding a Result Variable

1. To create a new result variable, scroll down to the bottom of the policy results list. Select **<New Result Variable>**. The New Result Variable popup will be displayed.

2. Enter in a **Variable Name**.

3. Select the **Data Type**.

4. Click **Save** to save your entry. The popup window will close. Your new result variable will be available for selection.

Using "Results of Step" Logic to Create a Premium Algorithm

When calculating premiums, it is sometimes necessary to separate each calculation into individual steps. For example, refer to the following sample algorithm, as it might be shown in a manual:

Premium = Base Rate x Territory Factor x Limit Factor x Credit A x Credit B
** Round to 0 places after each step*

In RateManager, we would want to break this algorithm into several arithmetic steps so we can round properly.

Within an algorithm or calculated variable, we can use a **Results of Step** term to incrementally save the end calculation from a step in order to use it in subsequent steps. The result from the step is only available in the current algorithm and will be lost once the algorithm completes processing. Refer to the example below. All the **Results of Step** terms are highlighted.

Step 1*: Results of Step 1 = Base Rate x Territory Factor*
Step 2*: Results of Step 2 = Results of Step 1 x Limit Factor*
Step 3*: Results of Step 3 = Results of Step 2 x Credit A*

NOTE	Results of Step variables are available in the available variables drop down list box under **Step Variables**.

Creating a New Algorithm Revision

Algorithm revisions can be created in both standard programs and in template generated programs, unless locked. In standard program revisions, all elements will be open for editing. In template generated program revisions, the name will not be open for editing. All other items can be edited as needed.

1. Navigate to the Algorithm Listing screen for the program that contains the algorithm where you want to create a new revision.

2. Select the algorithm you would like to create a new revision for and right click it. Select **Show/Hide Revisions** from the popup menu.

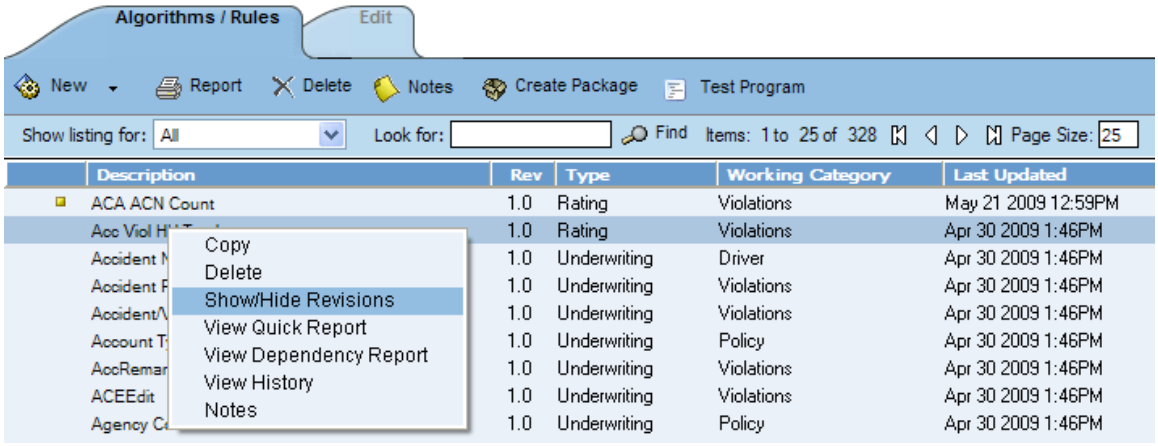


Figure 209 Selecting a New Algorithm Revision

3. Select the revision you would like the new revision based on and right click it. Select **New Revision** from the popup menu.

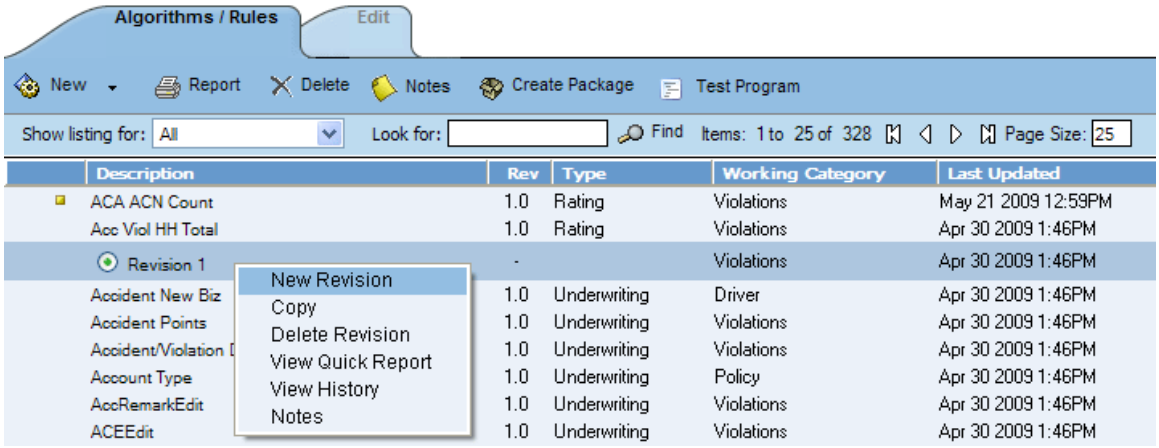


Figure 210 Creating a New Revision

4. The new revision will be created as the next available revision number and the listing will refresh. See Changing the Active Revision of an Algorithm for more information.

Changing the Active Revision of an Algorithm

The active revision can be changed on both unlocked standard programs and unlocked template generated programs. On a template generated program, if you change the revision from a template generated revision to a revision that you created, the algorithm will be open for editing. If you change back to the template generated revision, the algorithm will be locked and no longer open for editing.

1. Navigate to the Algorithm Listing screen for the program that contains the algorithm you want to change the active revision for.

2. Select the algorithm where you want to change the active revision and right click. Select **Show/Hide Revisions** from the popup menu.

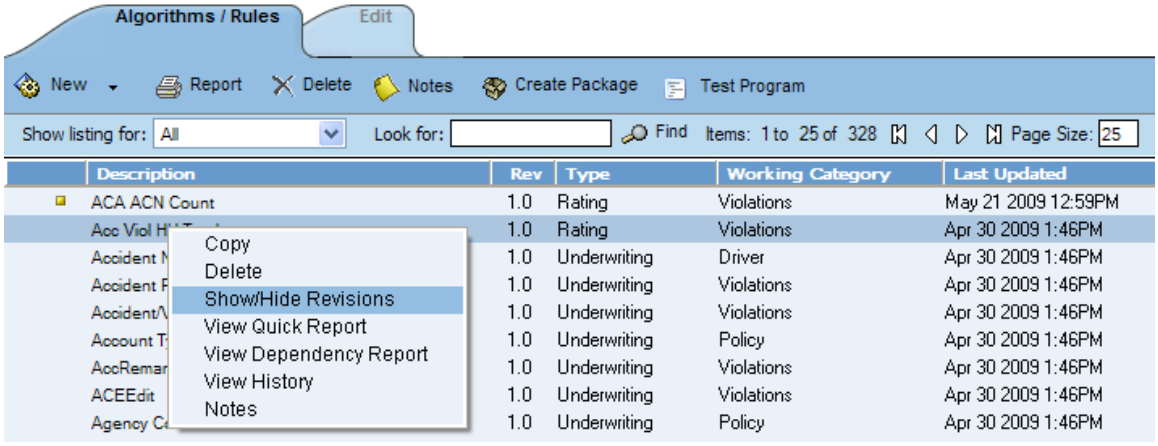


Figure 211 Changing an Active Revision

3. Select the radio button next to the revision you would like to make active.

4. You will be asked to confirm changing the active revision.

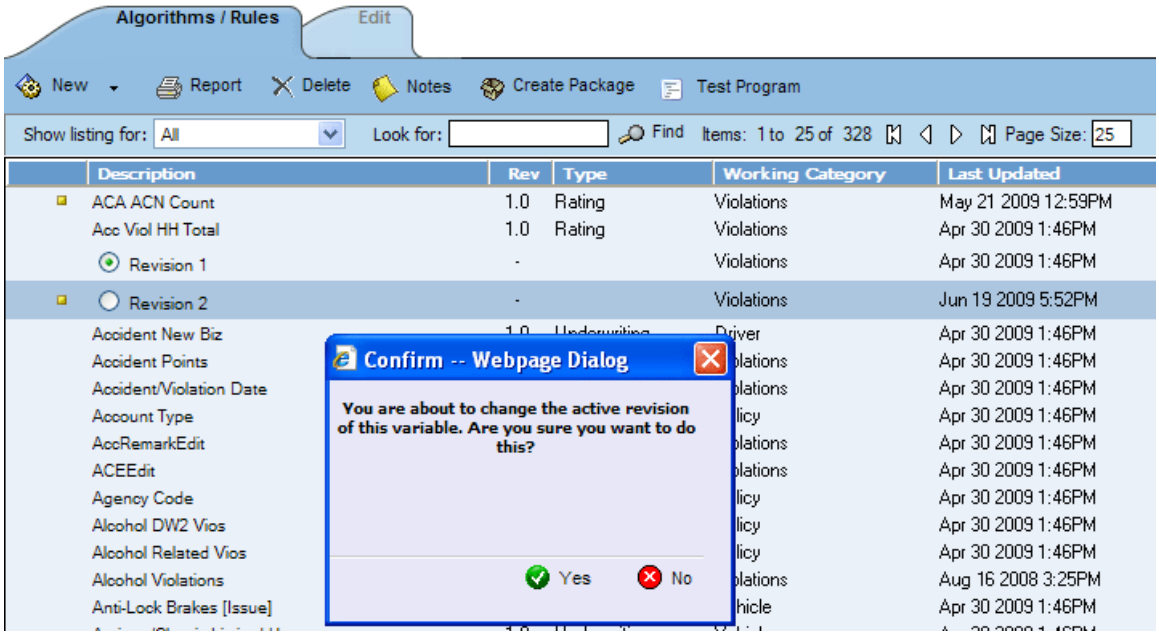


Figure 212 Selecting the Active Revision

5. Select **Yes** to change the active revision and refresh the algorithm listing. Select **No** to return to the algorithm listing.

6. The screen will refresh. The active revision has been made.

Copy an Algorithm

Algorithms may be copied within any program. In your default subline, you can copy an algorithm to another program with in the same subline. Template generated program will allow you to copy algorithms only within the same program. When copying an algorithm, the structure of the algorithm (including the working category and steps) is copied. Only the active revision is copied. If you have an algorithm with 10 revisions, and you copy the algorithm, only the active revision will be copied into the new algorithm. The other 9 revisions will not be copied.

There are two copy options:

- **Existing Program** – Copy the algorithm into the existing program under another name.
- **Other Program** – Copy the algorithm into another program within the same subline. This option is for algorithms within your default subline.

Copying an Algorithm

1. Select the algorithm you would like to copy and right click it. Select **Copy** from the popup menu.

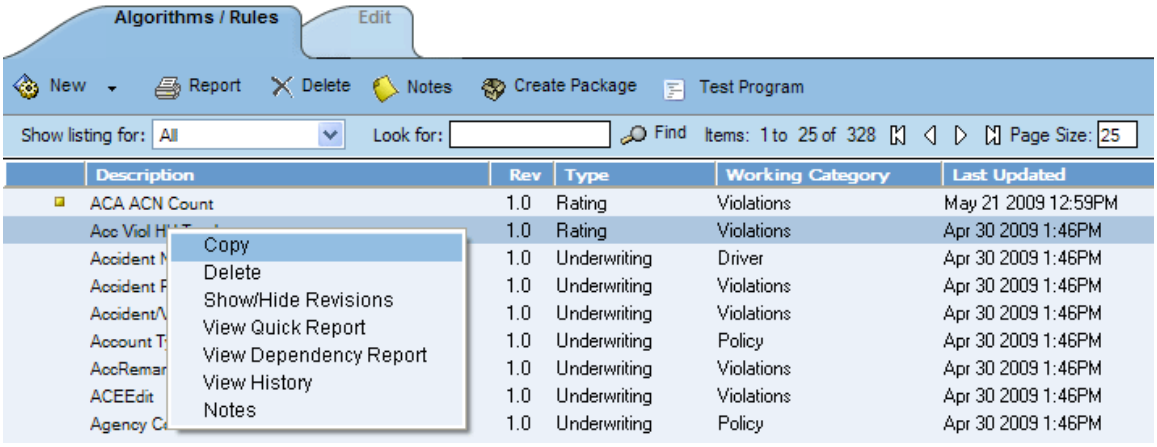


Figure 213 Copy Algorithm Menu

2. A separate popup window will be displayed.

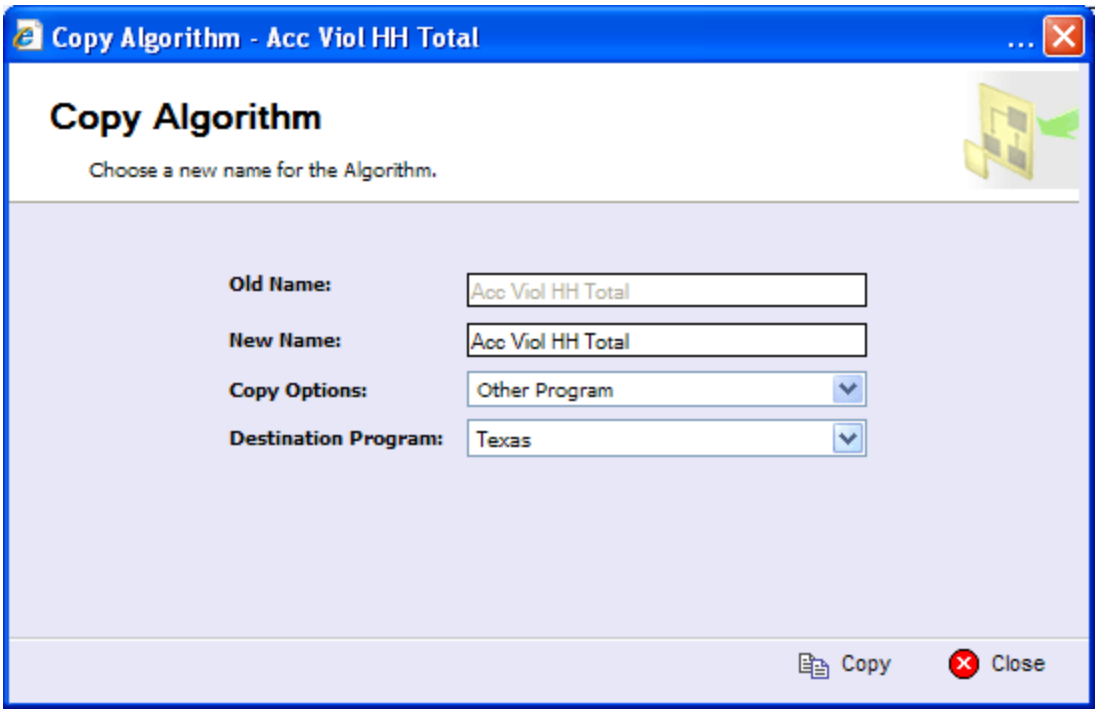


Figure 214 Copy Algorithm Popup

3. Enter in a **New Name**.
4. Select the **Copy Options**.
5. If you are copying an algorithm within your default subline, you can select to copy the algorithm to another program within the same subline. Select the **Destination Program** from the drop down menu.
6. Click **Copy** to copy the algorithm. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.
7. If the copy was successful, you will be returned to the previous screen. Your algorithm will have been copied. The last updated date will be the date the copy was made.

Deleting an Algorithm

When an algorithm is no longer needed, it can either be left in RateManager or deleted. When you delete an algorithm:

- The algorithm gets deleted from all versions of the program.
- All revisions of that algorithm get deleted as well.

If you are uncertain as to whether the algorithm will be used again, leave it in RateManager. This will save time if the algorithm is needed again and leaving it in RateManager won't slow down rating.

If you try to delete an algorithm that is still being used by a result group or another algorithm, you will receive an error. Algorithms that are locked or that are template generated cannot be deleted.

NOTE	Algorithms that are in use cannot be deleted.

To Delete an Algorithm

1. Navigate to the **Algorithm Listing** screen for the program that contains the algorithm you want to delete.

2. Select the algorithm you want to delete and either right click it and select **Delete** from the popup menu or click the Delete button.

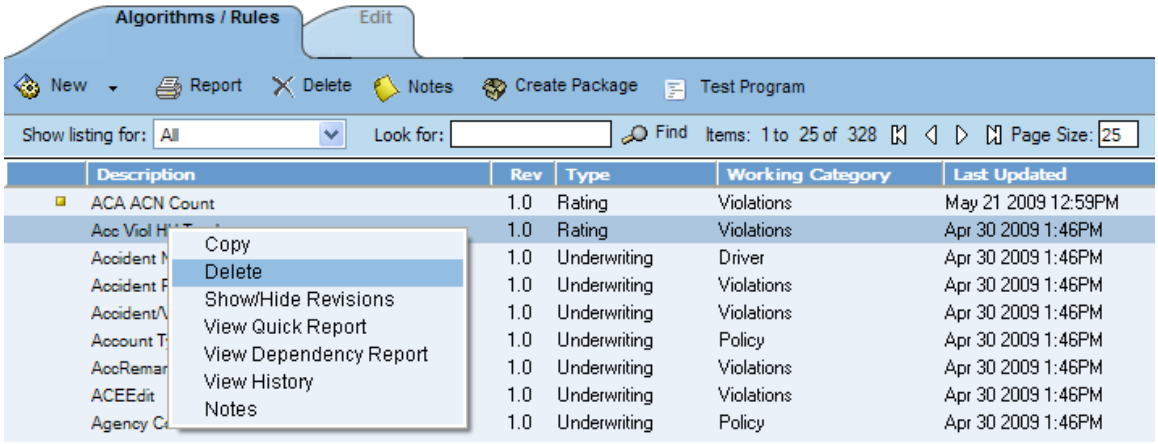


Figure 215 Deleting an Algorithm

3. You will be asked to confirm the deletion of the algorithm.

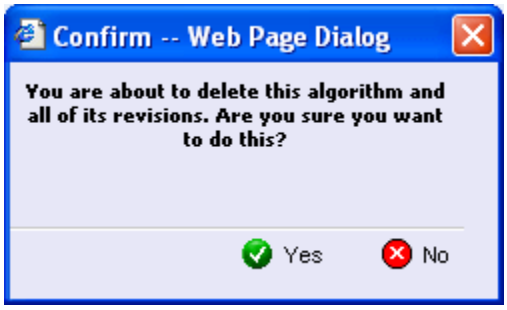


Figure 216 Confirm Delete

4. Select **Yes** to delete the algorithm and refresh the algorithm listing. Select **No** to return to the algorithm listing. If you try to delete an algorithm that is still being used in the Sequencing by any program version, you will receive an error message telling you where the algorithm is being used.

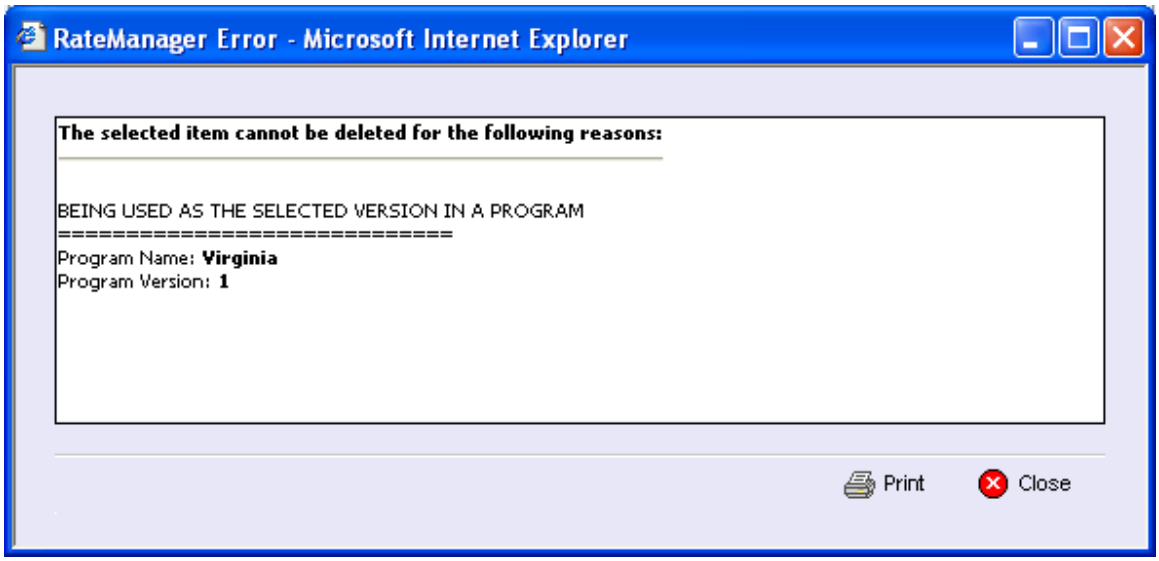


Figure 217 Algorithm Delete Error Message

Deleting an Algorithm Revision

When an algorithm revision is no longer needed, it can either be left in RateManager or deleted. Locked algorithms, active revisions and template generated revisions cannot be deleted. When you delete a revision, it gets deleted from all versions of the program. If you are uncertain as to whether the revision will be used again, simply leave it in RateManager. This will save time if the revision is needed and won't slow down rating.

To Delete an Algorithm Revision

1. Navigate to the Algorithm Listing screen for the program that contains the algorithm revision you want to delete.
2. Select the algorithm you would like to delete a revision for and right click it. Select **Show/Hide Revisions** from the popup menu.

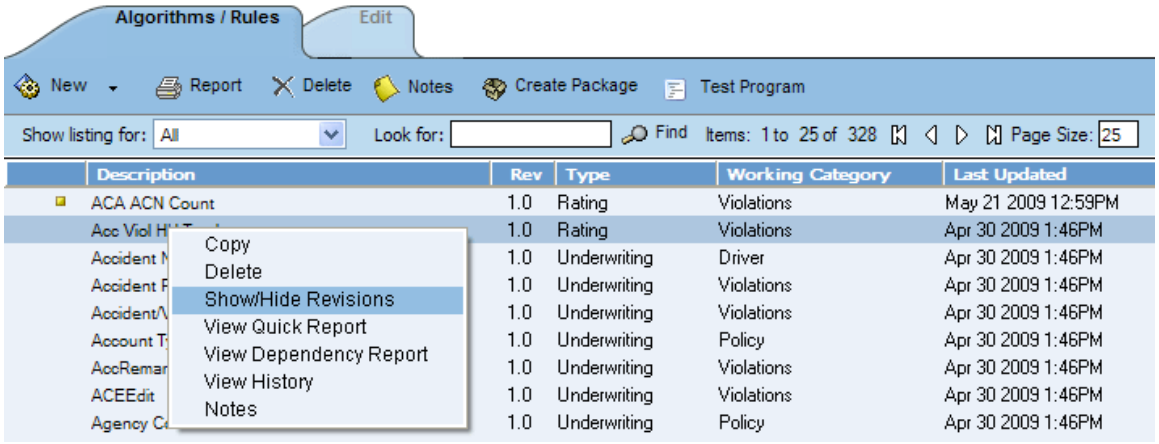


Figure 218 Selecting an Algorithm for Deleting

3. Select the revision you would like to delete and right click it. Select **Delete Revision** from the popup menu.

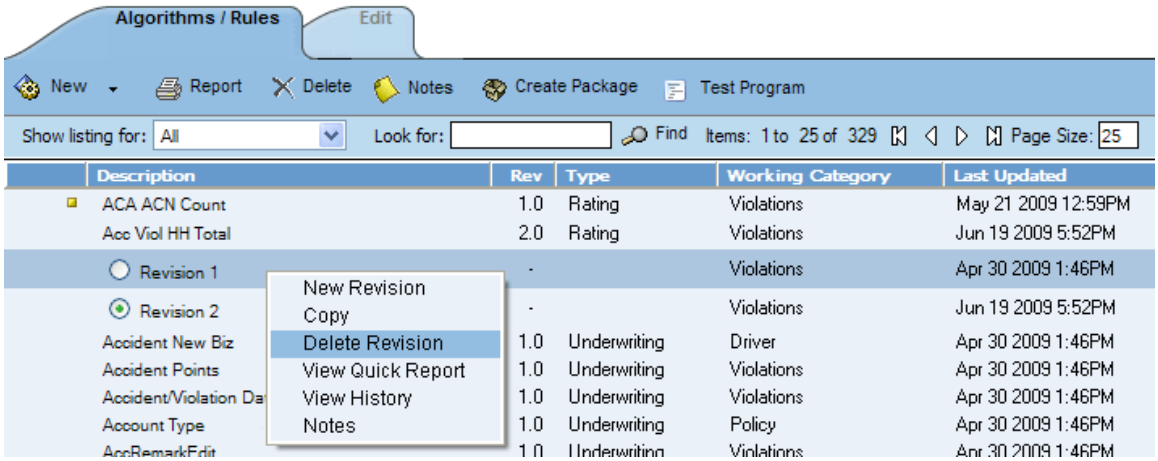


Figure 219 Deleting a Revision

4. You will be asked to confirm the deletion of the algorithm revision.

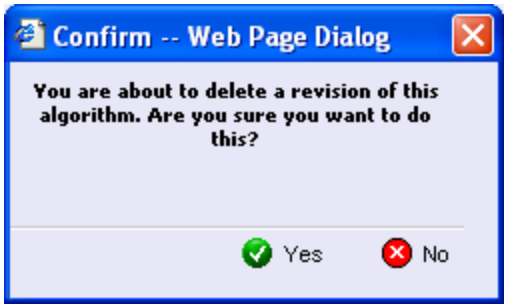


Figure 220 Confirming Delete

5. Select **Yes** to delete the algorithm revision and refresh the algorithm listing. Select **No** to return to the algorithm listing.

   If you try to delete the activated revision for the current program version, you will receive an error message.

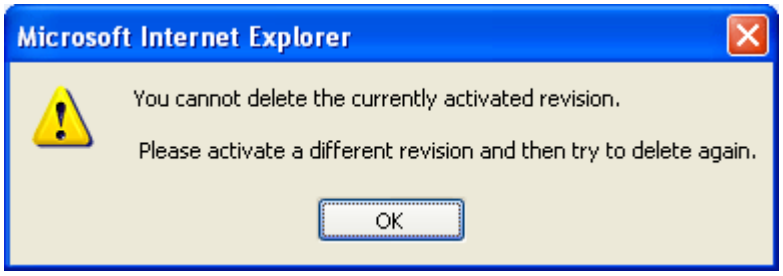


Figure 221 Deleting Revision Error Message

6. Trying to delete a revision that is set as the active revision for one of the other versions of the program will also result in an error message.

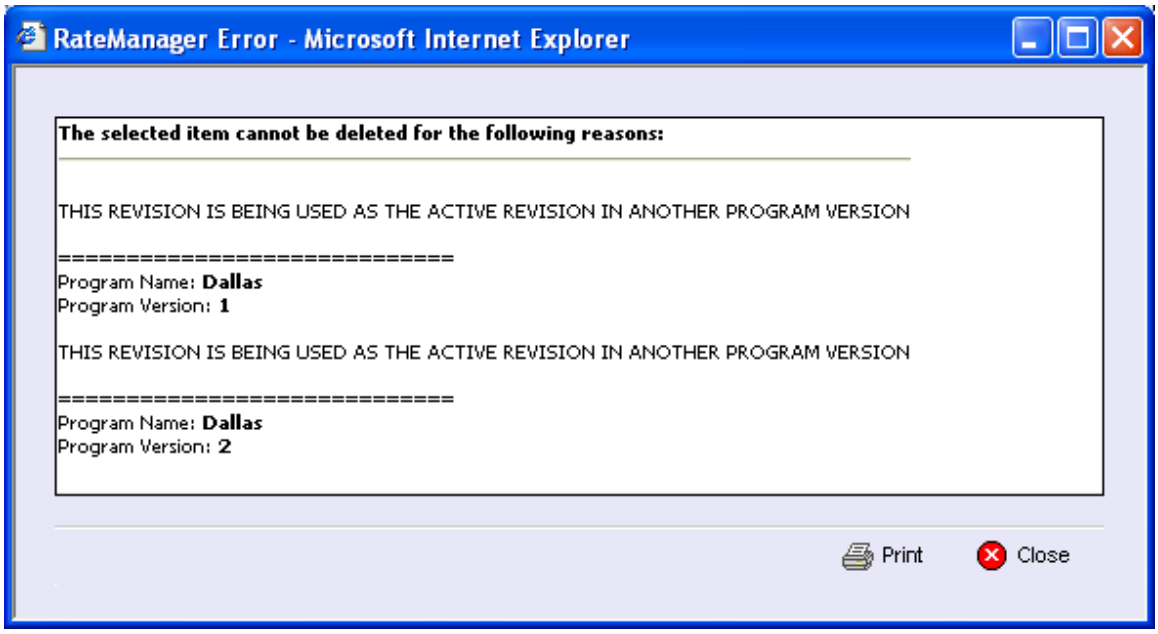


Figure 222 Deleting an Active Revision Error Message

11

Driver Assignment

Driver assignment is an auto insurance specific method of assigning a specific driver to a specific vehicle on a policy, based on certain criteria. Criteria often differ by carrier basis and sometimes even by program level.

There are two kinds of driver assignments:

- **Scenarios** – Created under the DA scenario option using *vehicle usage options*. Vehicle usage options are specific usage sets within RateManager that allow you to build a sequence of events within a defined scenario to obtain a desired result. See Vehicle Usage Options for detailed explanations. You will not be able to use categories in a scenario. There are four vehicle usage options that you can use:
  - Vehicle Usage by Vehicle Order (Input:299)
  - Vehicle Usage on Drivers
  - Driver Usage on Vehicle
  - Vehicle Usage by Vehicle ID (Input:299/368)

- **Algorithms** – These algorithms work exactly the same way as any other algorithm in RateManager and allow you to create a set of rules to be executed in sequence that will obtain a desired result. Algorithms use categories and not vehicle usage options. There are four algorithm options:
  - Flag Driver
  - Flag Vehicle
  - Rank Driver
  - Rank Vehicle

Driver assignments can be created by the user or brought in from a template. Driver assignments that are user created will be open for editing, copying, creating new revisions and deletion if they are not locked. Driver assignments that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New driver assignments can be added to a template and new revisions can be created. These new driver assignments will be open for editing, copying, creating new revisions or deletion, unless the program version is locked.

Driver Assignment Scenarios/Algorithms Screen

The **Driver Assignment Scenarios/Algorithms Screen** shows all driver assignment scenarios, flag driver, flag vehicle, rank driver and rank vehicle algorithms that have been created. In addition, the **Driver Assignment Scenarios/Algorithms Screen** shows the revision number, type and working category of the scenarios and algorithms. It allows you to:

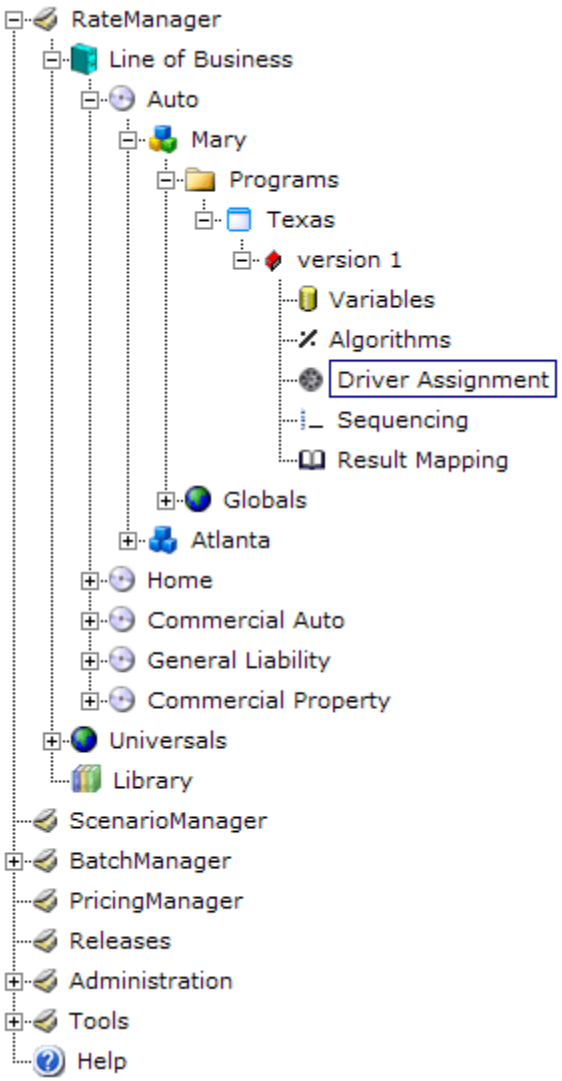
- Create, edit, copy and delete driver assignment scenarios
- Create, edit, copy and delete driver assignment algorithms
- Create, edit, copy and delete revisions for driver assignment scenarios and algorithms

- View reports on driver assignment scenarios and algorithms – See View Quick Report
- Create a package – See Introduction to Packaging
- Test a Program – See Introduction to Test Case Editor
- View Dependency Report – See View Dependency Report
- View History – See View History
- Enter a Note – See Notes

You will also have the ability to create and use these elements at a program version level or global level.

Navigate to the Driver Assignment Scenarios / Algorithms Screen

1. From the menu tree, select the auto line of business. Then select the subline, program and version that you want and click **Driver Assignment**.



2. This will open the driver assignment scenarios/algorithms screen. This screen looks and works like the Algorithm Listing Screen.

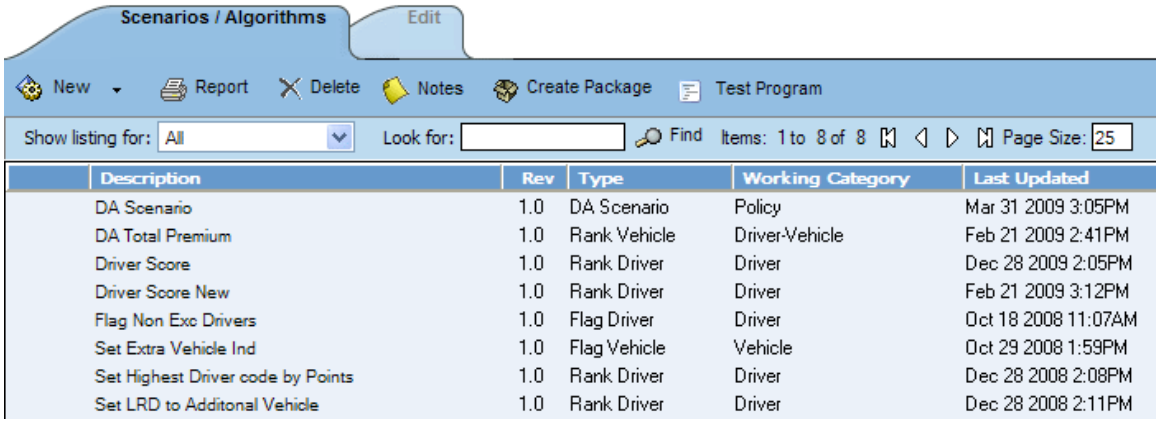


Figure 223 Driver Assignment Listing Screen

Navigation Bar

Edit Tab: Used to navigate to the Edit screen for the currently selected scenario or algorithm. You can also double-click a scenario or algorithm to edit it.

New: Used to create a new scenario or algorithm.

Report: Generates a Quick Report showing all the steps in the scenario or algorithm. See View Quick Report for more information.

Delete: Removes the selected scenario or algorithm from the program. If the scenario or algorithm is being used in the Sequence, you will receive an error message.

Notes: Allows you to enter, edit and view notes to the scenario or algorithm.

Create Package: Packages the program for rating and testing. See Introduction to Packaging for more information.

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.

Show Listing For: Allows you to filter for scenarios or algorithms.

- **All** will show all scenarios and algorithms.
- **DA Scenario** will show all DA scenarios.
- **Flag Driver** will show all flag driver algorithms.
- **Rank Driver** will show all rank driver algorithms.
- **Flag Vehicle** will show all flag vehicle algorithms.
- **Rank Vehicle** will show all rank vehicle algorithms.

Look For: Allows you to narrow the list of scenarios or algorithms. To do this, type in a part or the entire name you are looking for and click Find. To re-show all the scenarios or algorithms, clear this box and select Find.

Page Size: Allows the user to customize the number of scenarios or algorithms displayed per page and move back and forth between pages. Also displays the total number of

scenarios or algorithms that match the criteria in both the Show Listing For box and the Look For box.

	Move to the first page
	Move back one page
	Move forward one page
	Move to the last page

Column Sorting: You can sort scenarios or algorithms by individual column headers. The default view is alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Scenario/Algorithm Listing

The Scenario/Algorithm Listing contains a list of all scenarios and algorithms in the program, sorted alphabetically. A globe icon indicates the algorithm is a global scenario or algorithm. See Global Algorithms for more information.

Description: Name of the scenario or algorithm.

Rev: Shows which revision of the scenario or algorithm is used by the current program version.

Type: Displays the type of scenario or algorithm.

Working Category: Displays the working category of the scenario or algorithm. All driver assignment scenarios will be under the Policy working category. Algorithms will display the category where they were created.

Last Updated: Time stamp of the last time the scenario or algorithm was saved.

Creating a New Driver Assignment

Driver assignments can be template generated or created by you. Template generated driver assignments will be grayed out and locked. They are not open for editing but can be copied.

1. Navigate to the **Driver Assignment Scenarios/Algorithms Screen** for the program where you want to create a new driver assignment.

2. Select

from the menu bar and then select the type of driver assignment you would like to create:

   - **DA Scenario**
   - **Flag Driver**
   - **Rank Driver**
   - **Flag Vehicle**
   - **Rank Vehicle**

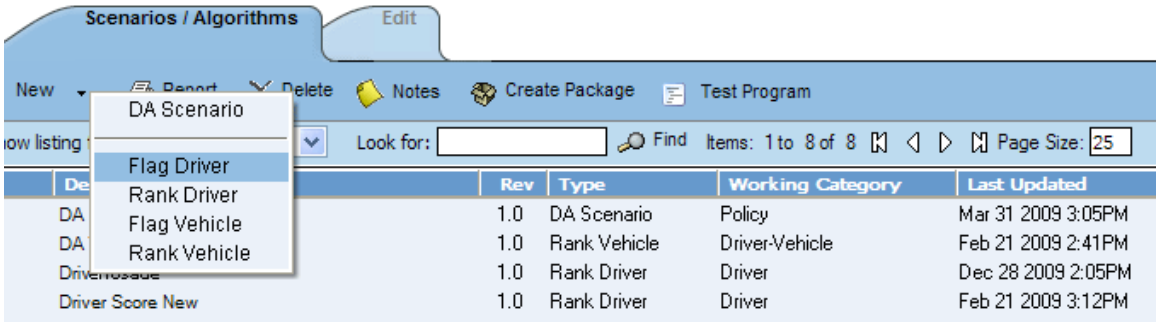


Figure 224 Creating a New Driver Assignment Algorithm

3. From here, you can enter a name, select the vehicle usage option or category and add steps. See Editing a Driver Assignment for more information.

Driver Assignment Edit Screen

The Driver Assignment **Edit** screen allows you to change information such as the scenario/algorithm name, vehicle usage option or working category and steps. Driver assignments that are grayed out or locked cannot be edited. Template generated driver assignments that are using revision 1 are not open for editing. If you want to edit a template generated driver assignment, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed.

Navigate to the Edit Screen

1. Navigate to the **Scenarios/Algorithms Screen** for the program that contains the scenario or algorithm you want to edit.
2. Find the scenario or algorithm you want to edit and either double-click it or select it and click the **Edit** tab. This will open the **Edit** screen.

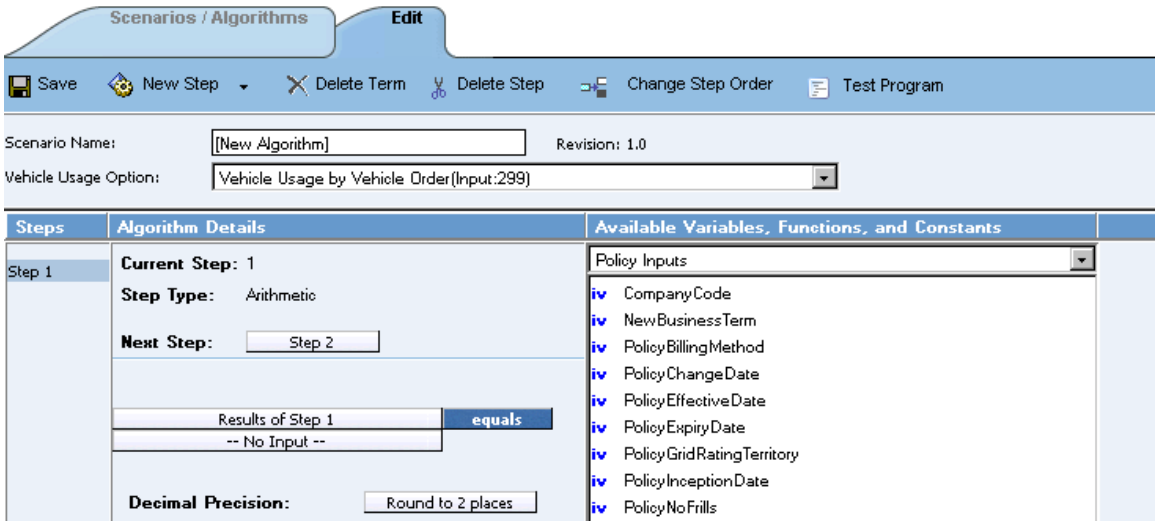


Figure 225 Editing a Driver Assignment Scenario

Navigation Bar

Scenarios/Algorithms Tab: Used to go back to the Driver Assignment Scenarios/Algorithms Screen.

Save: Saves the current driver assignment.

New Step: Creates a new step. For more information, see Step Types.

Delete Term: Deletes the currently selected term from a step in the driver assignment.

Delete Step: Deletes the currently selected step. You cannot delete the last step in either a scenario or algorithm.

Change Step Order: Allows users to change the order of the steps without using the drop and drag feature.

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to Test Case Editor for more information.

Scenario / Algorithm Name & Vehicle Usage Option / Category

Scenario Name/ Algorithm Name: Entry for what you want the driver assignment to be called. Alphanumeric characters are permitted, but no special symbols (ex: &, *, ", +, @, etc).

Vehicle Usage Option/Category: Allows you to select the vehicle usage criteria for a DA Scenario or to select the category to be used with the algorithm.

Algorithm Details

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Algorithm Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set via a drop down listing by clicking on the text box next to **Decimal Precision.** You can select a decimal precision from 0 to 5 digits.

Available Variables, Functions and Constants Selection Box: Drop down selection of available inputs, variables, results, constants and callouts sorted by category. On Policy inputs, you will be able to add a new input variable without leaving the Edit screen. On Result inputs, you will be able to add a new result variable without leaving the Edit screen. On Constants, you will be able to enter in a custom value constant without leaving the edit screen.

NOTE	When selecting Callouts for use in a drivers assignment or algorithm, the driver/vehicle category cannot be mapped.

Editing a Driver Assignment

Editing a driver assignment allows you to change information about the scenario/algorithm such as name, vehicle usage option or working category and steps. Driver assignments that are grayed out or locked cannot be edited. Template generated driver assignments that are using revision 1 are not open for editing. If you want to edit a template generated driver assignment, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed. Changes are effective immediately.

To Edit a Driver Assignment

1. Find the driver assignment you want to edit and either double-click it or select it and click the **Edit** tab. This will open the **Edit** screen.

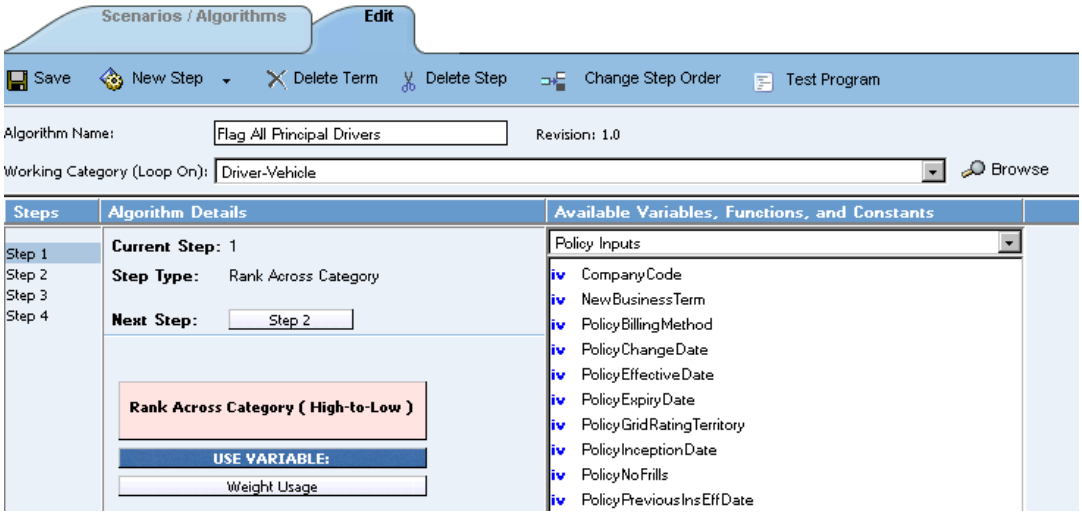


Figure 226 Editing a Driver Assignment Algorithm

2. If the name field is open, you can make changes. The vehicle usage options or category field can be changed if necessary.

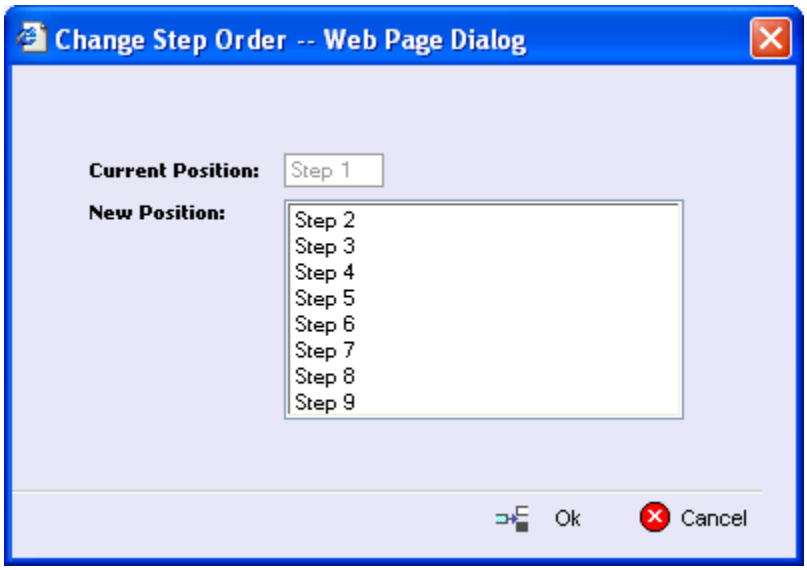
3. The screen below will refresh with the new step parameters. Depending upon the step type, you will have to select the appropriate variables, functions, constants or inputs. The value you need to select will be listed on the step. For example, if the step has an “Enter Variable” box, you must choose the variable type from the drop down menu on the right hand side of the screen. The options will be populated underneath. Click the “Enter Variable” box and then double-click the corresponding variable you want. The box will refresh with your selected value.

NOTE	For callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made.

4. To change the step order, you have two options:

   a. Select a step in the **Steps** column, drag it to a new location in the list and drop it.

b. Select the step you want to move and click the Change Step Order button. A separate screen will be displayed.



c. The current step position will be displayed at the top of the screen. Select where you want the step to be placed.
d. Click **OK**. You will be returned to the edit screen. Your step should be placed where you chose.

5. To delete a step, select the step in the **Steps** column and then click Delete Step. You cannot delete the last step from an algorithm.

6. When you are finished making changes, click Save.

Adding an Input Variable, Result Variable or Custom Value Constant

A new input variable, result variable or custom value constant can be created while entering or editing a driver assignment, without leaving the Edit screen.

- To add an **Input Variable** – See Adding an Input Variable
- To add a **Custom Value Constant** – See Adding a Custom Value Constant
- To add a **Result Variable** – See Adding a Result Variable

Creating a New Driver Assignment Revision

Driver assignment revisions can be created in both standard programs and in template generated programs, unless locked. In standard program revisions, all elements will be open for editing. In template generated program revisions, the name will not be open for editing. All other items can be edited as needed.

1. Navigate to the Driver Assignment Scenario/Algorithm screen for the program that contains the driver assignment where you want to create a new revision.

2. Select the driver assignment you would like to create a new revision for and right click it. Select **Show/Hide Revisions** from the popup menu.

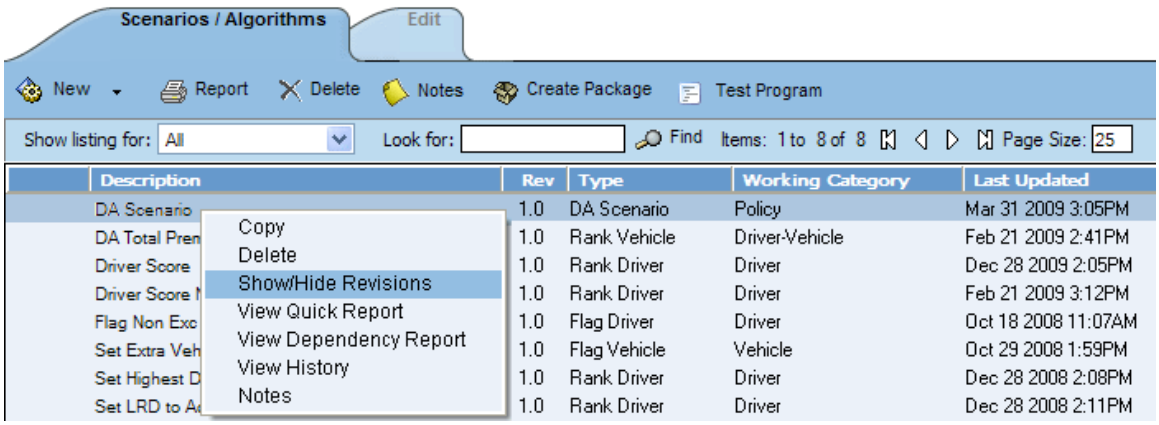


Figure 227 Creating a New Driver Assignment Revision

3. Select the revision you would like the new revision based on and right click it. Select **New Revision** from the popup menu.

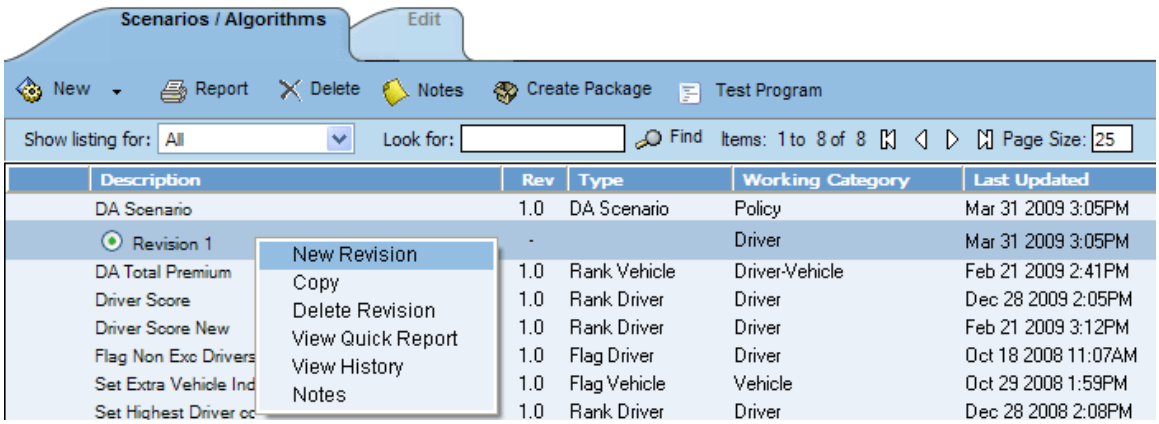


Figure 228 Selecting the Revision

4. The new revision will be created as the next available revision number and the listing will refresh. See Changing the Active Revision of a Driver Assignment for more information.

Changing the Active Revision of a Driver Assignment

The active revision can be changed on both unlocked standard programs and unlocked template generated programs. On a template generated program, if you change the revision from a template generated revision to a revision that you created, the driver assignment will be open for editing. If you change back to the template generated revision, the driver assignment will be locked and no longer open for editing.

1. Navigate to the Driver Assignment Scenario/Algorithm screen for the program that contains the driver assignment where you want to change the revision.

2. Right click and select **Show/Hide Revisions** from the popup menu.

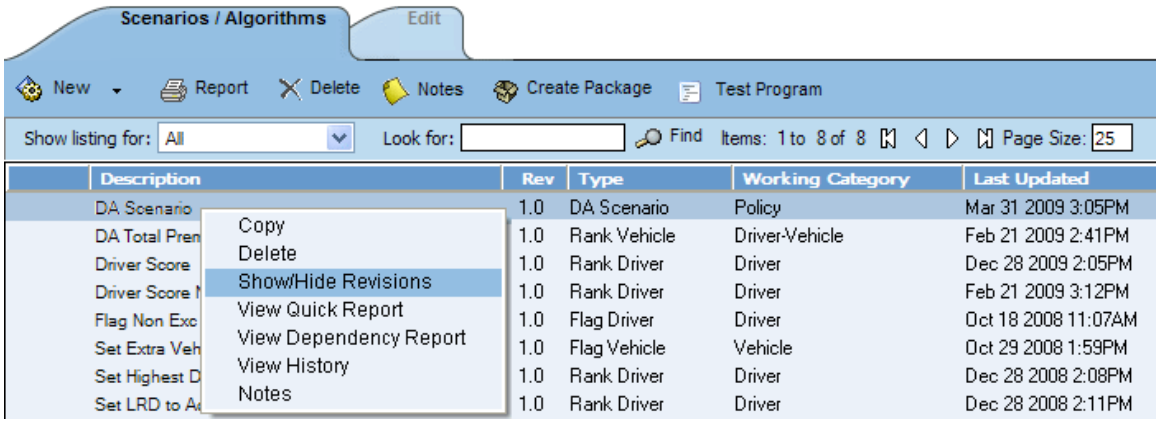


Figure 229 Changing an Active Revision

3. Select the radio button next to the revision you would like to make active.

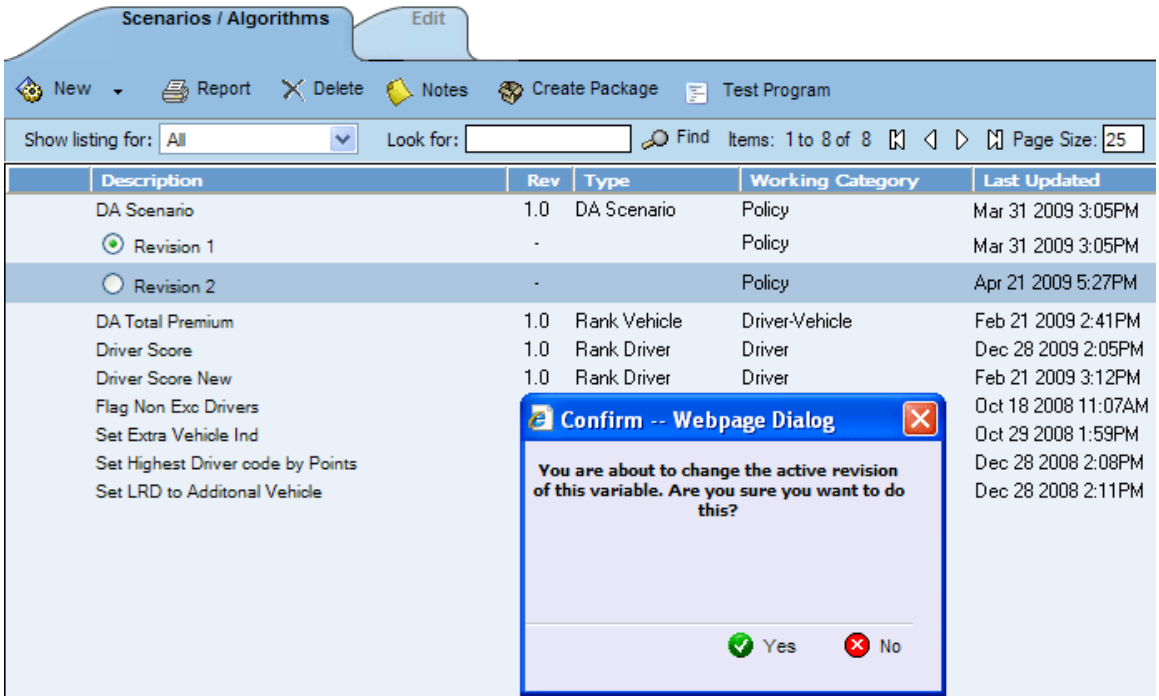


Figure 230 Selecting the Active Revision

4. You will be asked to confirm changing the active revision.

5. Select **Yes** to change the active revision and refresh the scenario/algorithm listing. Select **No** to return to the driver assignment scenario/algorithm screen.

Copying a Driver Assignment

Driver assignments may be copied within any program. In your default subline, you can copy a driver assignment to another program with in the same subline. Template generated programs will allow you to copy driver assignments only within the same program. When copying a driver assignment, the structure (including the vehicle usage options/category and steps) is copied. Only the active revision is copied. If you have a drivers assignment with 10 revisions, and you copy the drivers assignment, only the active revision will be copied into the new drivers assignment. The other 9 revisions will not be copied.

There are two copy options:

Existing Program – Copy the driver assignment into the existing program under another name.

Other Program – Copy the driver assignment into another program within the same subline. This option is for driver assignments within your default subline.

Copying a Driver Assignment

1. Select the driver assignment you would like to copy and right click it. Select **Copy** from the popup menu.

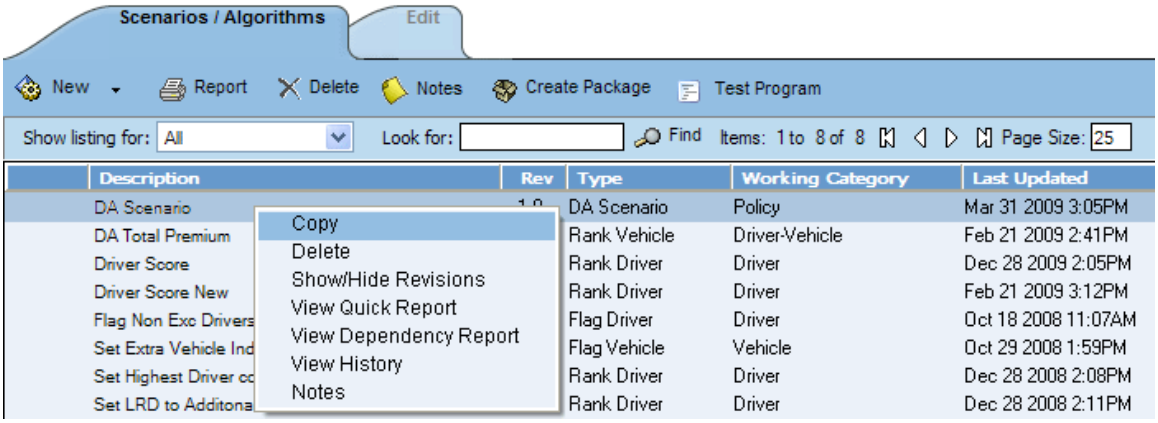


Figure 231 Copy Driver Assignment Menu

2. A separate popup window will be displayed.

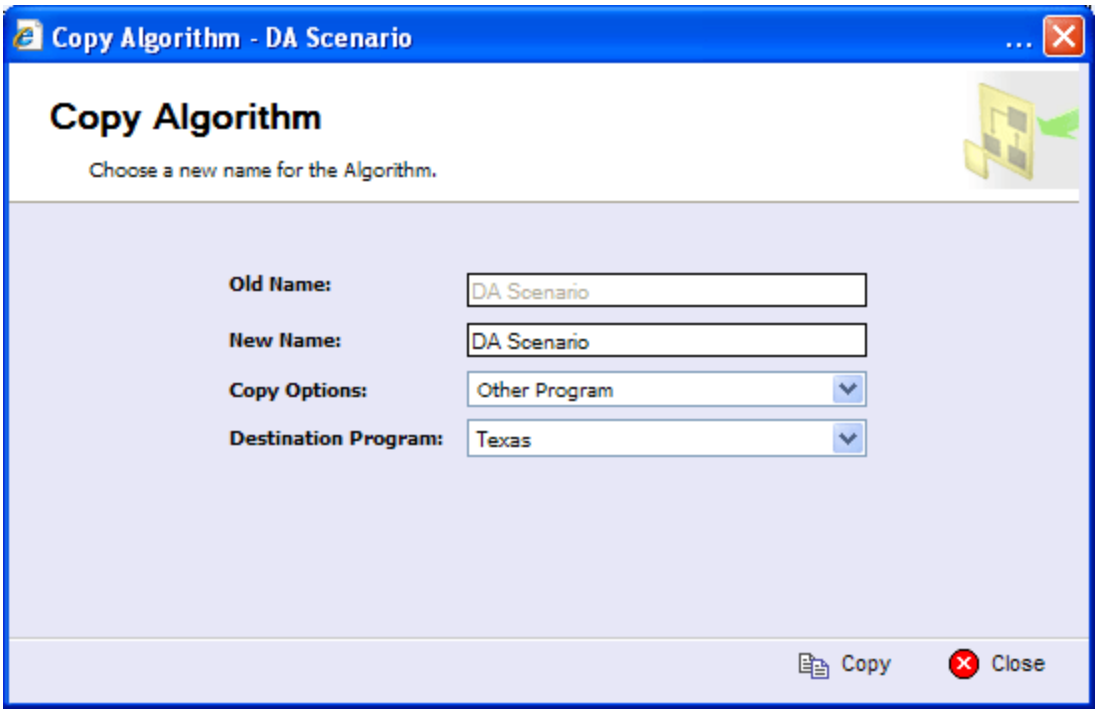


Figure 232 Copy Driver Assignment Popup

3. Enter in a **New Name**.

4. Select the **Copy Options**. If you are copying a driver assignment within your default subline, you can select to copy the driver assignment to another program within the same subline. Select the **Destination Program** from the drop down menu.

5. Click **Copy** to copy the driver assignment. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.

6. If the copy was successful, you will be returned to the previous screen. Your driver assignment will have been copied. The last updated date will be the date the copy was made.

Deleting a Driver Assignment

When a driver assignment is no longer needed, it can either be left in RateManager or deleted.

When you delete a driver assignment:

- The driver assignment gets deleted from all versions of the program.
- All revisions of that driver assignment get deleted as well.

If you are uncertain as to whether the driver assignment will be used again, leave it in RateManager. This will save time if the driver assignment is needed again and leaving it in RateManager won't slow down rating.

If you try to delete a driver assignment that is still being used, you will receive an error. Driver assignments that are locked or that are template generated cannot be deleted.

NOTE	Driver Assignments that are in use cannot be deleted.

To Delete a Driver Assignment

1. Navigate to the **Driver Assignment Scenario/Algorithm** screen for the program that contains the driver assignment you want to delete.

2. Select the driver assignment you want to delete and either right click it and select **Delete** from the popup menu or click the Delete button.

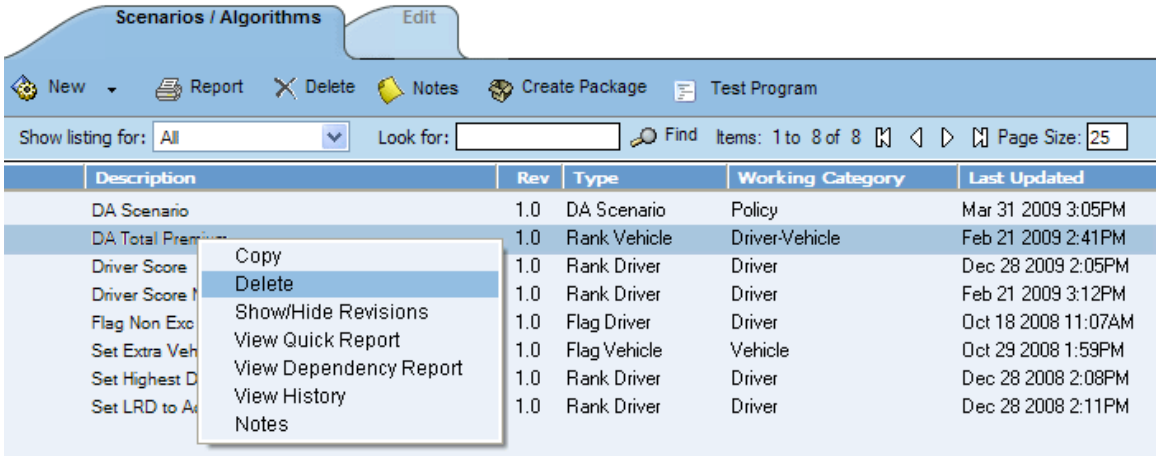


Figure 233 Deleting a Driver Assignment

3. You will be asked to confirm the deletion.

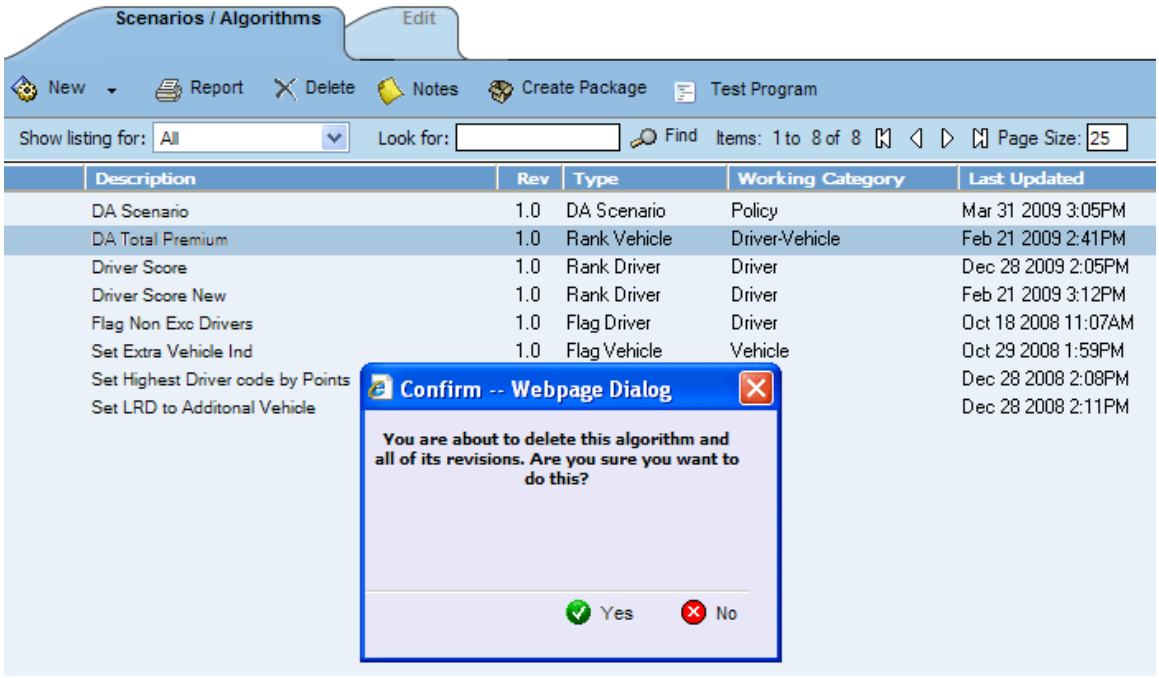


Figure 234 Confirm Delete

4. Select **Yes** to delete the driver assignment and refresh the listing. Select **No** to return to the listing. If you try to delete a driver assignment that is still being used in the Sequencing by any program version, you will receive an error message.

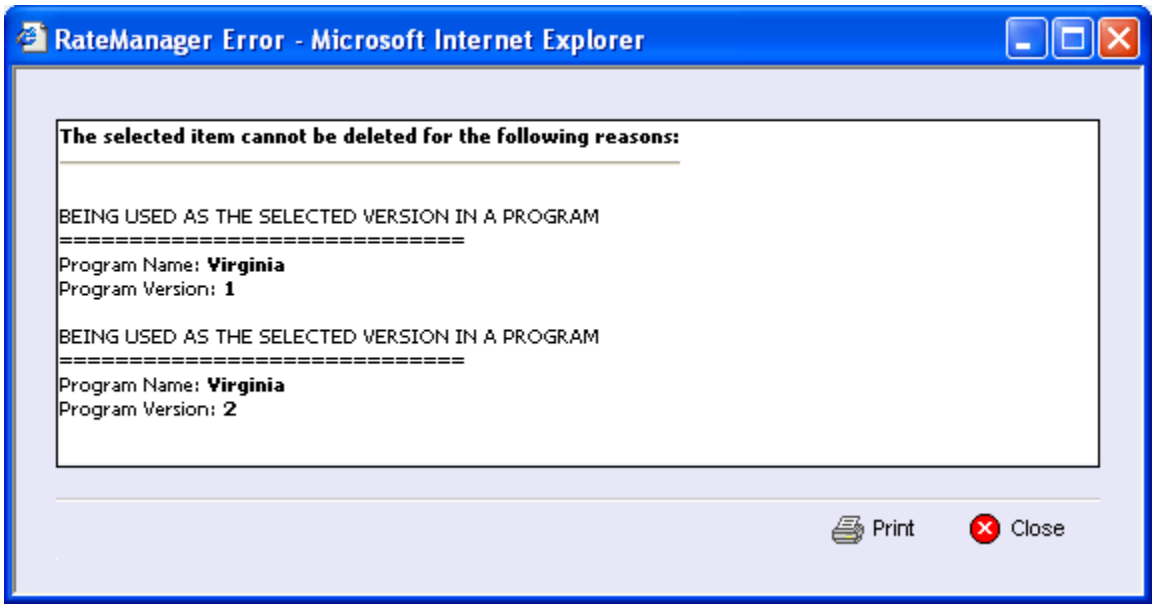


Figure 235 Algorithm Delete Error Message

Deleting a Driver Assignment Revision

When a driver assignment revision is no longer needed, it can either be left in RateManager or deleted. Locked driver assignments, active revisions and template generated revisions cannot be deleted. When you delete a revision, it gets deleted from all versions of the program. If you are uncertain as to whether the revision will be used again, simply leave it in RateManager. This will save time if the revision is needed and won't slow down rating.

To Delete a Driver Assignment Revision

1. Navigate to the **Driver Assignment Scenario/Algorithm** screen for the program that contains the driver assignment revision you want to delete.
2. Right click and select **Show/Hide Revisions** from the popup menu.

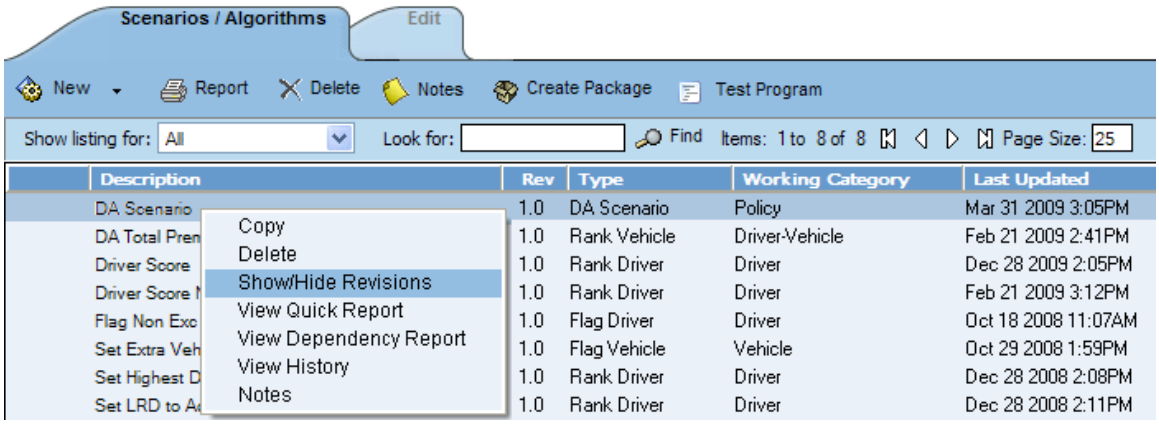


Figure 236 Selecting a Revision for Deleting

3. Select the revision you would like to delete and right click it. Select **Delete Revision** from the popup menu.

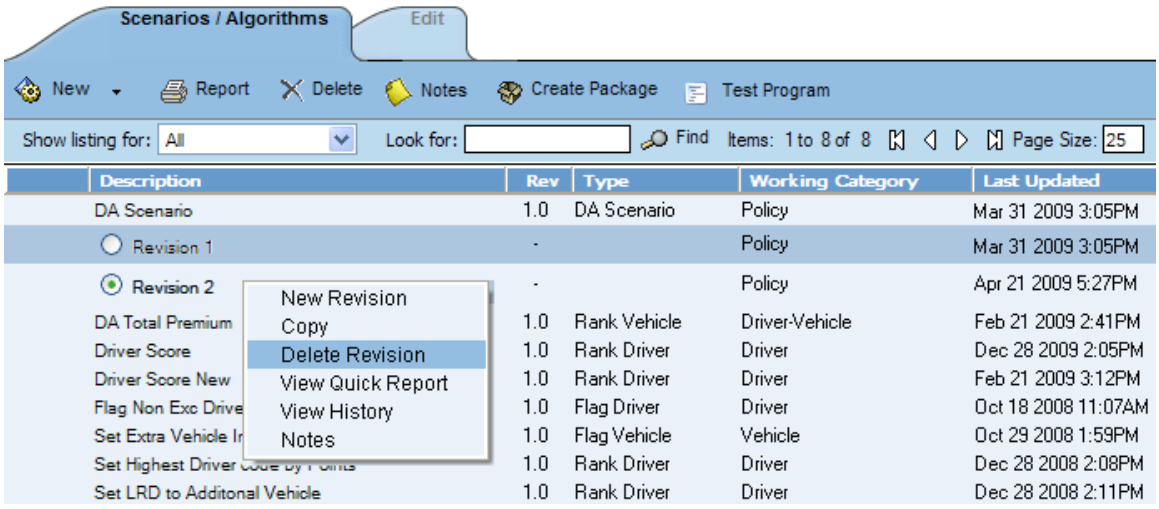


Figure 237 Deleting a Revision

4. You will be asked to confirm the deletion of the revision.

5. Select **Yes** to delete the revision and refresh the driver assignment listing. Select **No** to return to the driver assignment scenario/algorithm screen.

6. If you try to delete the activated revision for the current program version, you will receive an error message.

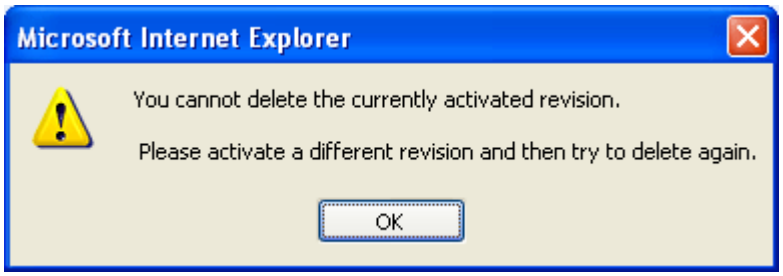


Figure 238 Deleting Revision Error Message

7. Trying to delete a revision that is set as the active revision for one of the other versions of the program will also result in an error message.

NOTE	Revisions that are in use cannot be deleted.

Vehicle Usage Options

Vehicle Usage Options are available when you create a Drivers Assignment Scenario. Many carriers make decisions in driver assignment based on vehicle usage. In RateManager, four vehicle usage options are supported:

- Vehicle Usage by Vehicle Order (Input:299)
- Vehicle Usage on Drivers
- Driver Usage on Vehicles
- Vehicle Usage by VehicleID (Inputs:299/368)

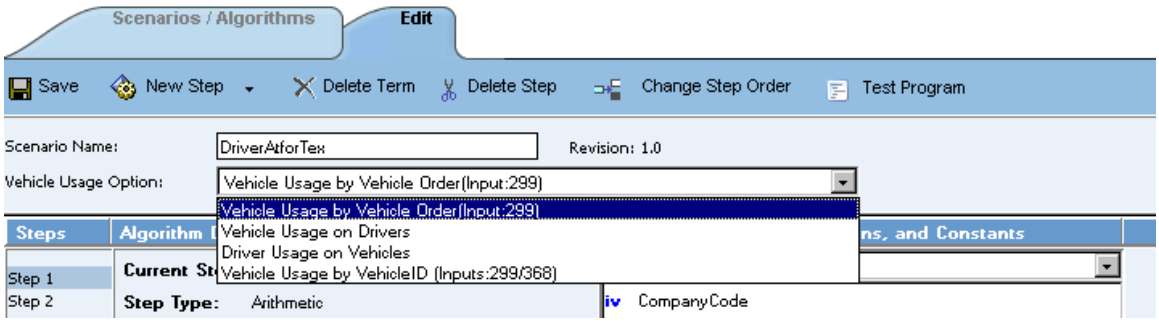


Figure 239 Vehicle Usage Options

Vehicle Usage by Vehicle Order (Input:299)

Vehicle usage is designated as the actual vehicle a driver principally operates, based on the order of the vehicles in the input file. For example, driver 1 principally operates the second vehicle on the policy. In RateManager, this is accomplished using the Driver input 299 (VehPrincipallyDriven). Specify the vehicle a driver principally operates by setting the VehPrincipallyDriven input equal to the order the vehicle appears in the input file.

Vehicle Usage on Drivers

Vehicle usage is designated as a percentage a driver operates each vehicle. For example, driver 1 operates vehicle 1 50% of the time and vehicle 2 50% of the time. In RateManager, this is accomplished using the Driver inputs 9-16 and 50 (DrvUsePctOnVehX, where X represents an integer 1-9). This method supports an unlimited number of drivers and up to nine vehicles. The percentages should add up to 100%.

Driver Usage on Vehicles

Vehicle usage is designated as a percentage a vehicle is operated by each driver. For example, vehicle 1 is driven by driver 1 50% of the time and driver 2 50% of the time. In RateManager, this is accomplished using the Vehicle inputs 1-8 and 700 (VehUsePctOnDrvX, where X represents an integer 1-9). This method supports an unlimited number of vehicles and up to nine drivers. The percentages should add up to 100%.

Vehicle Usage by VehicleID (Inputs:299/368)

Vehicle usage is designated as the actual vehicle a driver principally operates, based on the vehicle number specified in the input file. For example, driver 1 principally operates vehicle 3. In RateManager, this is accomplished using the Vehicle input 368 (VehicleID) and Driver input 299 (VehPrincipallyDriven). Specify the vehicle a driver principally operates by setting the VehPrincipallyDriven input equal to the VehicleID of the vehicle the driver principally operates.

Scenario Functions

In order to reproduce a variety of different carrier logic flows, RateManager has specific functions that are available only in a driver assignment scenario. These functions work similar to normal algorithm steps, except that the functions usually require an association with an algorithm instead of a variable. Inside a driver assignment scenario, the functions are available from the **Available Variables, Functions, and Constants** drop down.

To add one of the functions to your driver assignment scenario, double-click the one you want to add from the Available Variables, Functions, and Constants drop down menu.

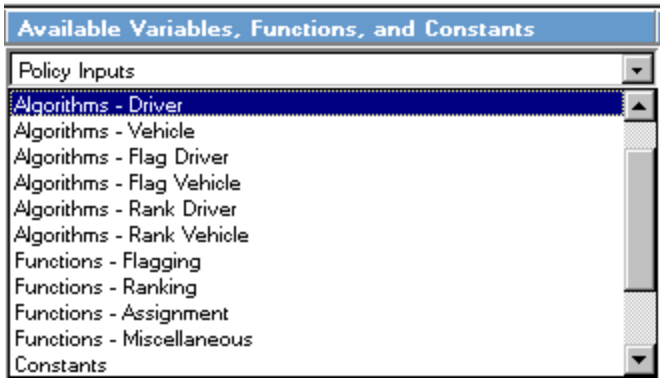


Figure 240 Functions Menu

The function categories are as follows:

- Flagging Functions
- Ranking Functions
- Assignment Functions
- Miscellaneous Functions

Flagging Functions

Before covering all flagging functions available, it is important to understand the RateManager driver assignment concept of flagging. This process can be compared to that of filtering. For example, if you would like to select all drivers under the age of 21, in driver assignment you would make the statement "Flag all drivers under the age of 21". This operation is usually performed before making a calculation or assignment determination on a specific set of drivers or vehicles.

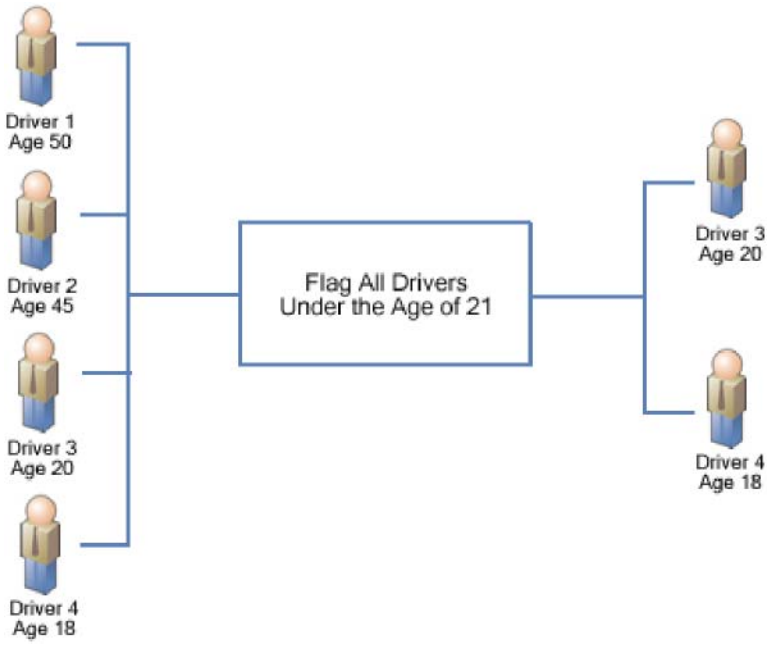


Figure 241 Flagging Functions

Most flagging functions require an association with a predefined flagging algorithm in order to determine custom criteria for the function. For more information, see Flagging Algorithms. Flagging functions are only available from within a driver assignment scenario.

To add a flagging function to your driver assignment scenario, select **Functions - Flagging** from the **Available Variables, Functions, and Constants** drop down and then double-click the flagging function you want to add. If the flagging function requires an association with a flagging algorithm, a box with an asterisk (*) will appear in the step type. Replace the asterisk box with a flagging algorithm the same way you would replace an item in a calculated variable or algorithm step.

The flagging algorithms are available from the **Available Variables, Functions, and Constants** drop down under **Algorithms - Flag Driver** and **Algorithms - Flag Vehicle.**

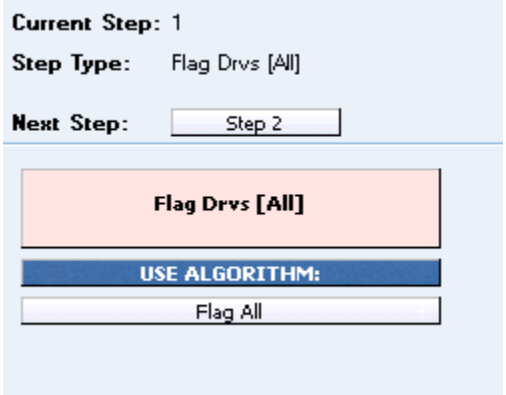


Figure 242 Adding a Flagging Function

Available Flagging Functions

Flag 1st Ranked Drv

This flagging operation should only be performed after a driver ranking function. It chooses the 1st or top ranked driver from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag 1st Ranked Veh

This flagging operation should only be performed after a vehicle ranking function. It chooses the 1st or top ranked vehicle from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag All Vehs

All vehicles are in the scope and available for flagging, therefore ignoring any previously flagged vehicles. An association with a predefined flag vehicle algorithm must be made in this function.

Flag Assigned Vehs

All assigned vehicles are in the scope and available for flagging, therefore ignoring any previously flagged vehicles. An association with a predefined flag vehicle algorithm must be made in this function.

Flag Drvs [All]

All drivers are in the scope and available for flagging, therefore ignoring any previously flagged drivers. An association with a predefined flag driver algorithm must be made in this function.

Flag Drvs [All] (Usage Set)

This flagging operation should only be used when the Vehicle Usage Option is set to Vehicle Usage on Drivers. This flagging operation creates a collection, or usage set, of

drivers for each vehicle that can then be ranked and assigned using similar Usage Set functions. Currently, this operation will function correctly only when "Weight Usage Result" is selected in the "Use Algorithm" field. The "Weight Usage Result" selection creates usage sets of drivers consisting of any driver whose DrvUsePctOnVehX input value for the corresponding vehicle is not null.

Example 1:

Driver 1
DrvUsePctOnVeh1 = 30
DrvUsePctOnVeh2 = 70
DrvUsePctOnVeh3 = NULL

Driver 2
DrvUsePctOnVeh1 = NULL
DrvUsePctOnVeh2 = 10
DrvUsePctOnVeh3 = 90

Vehicle 1's usage set of drivers will include Driver 1 only.
Vehicle 2's usage set of drivers will include both Driver 1 and Driver 2.
Vehicle 3's usage set of drivers will include Driver 2 only.

This flagging function also lets the user specify up to three vehicle-level inputs or variables that can be used in a Rank Driver or Flag Driver algorithms, where vehicle-level inputs or variables would ordinarily not be available. These variables are labeled "Usage Set Variable #1-3" and are available under the "DA Driver Results" available variable listing.

The "Weight Usage Result" system variable can also be used in a Rank Driver or Flag Driver algorithm, after the Flag Drvs [All] (Usage Set) operation has been performed. This system variable returns the value of the driver's DrvUsePctOnVehX input corresponding to the vehicle usage set that a Rank Driver or Flag Driver algorithm is operating on.

Example 2:

Using the usage sets created in Example 1, if we are ranking the drivers in Vehicle 2's usage set high-to-low based on driver use percentage, we would create a Rank Driver algorithm using the Weight Usage Result. In this case, Driver 1 would be ranked before Driver 2 because Driver 1's DrvUsePctOnVeh2 = 70 while Driver 2's DrvUsePctOnVeh2 = 10.

This flagging option will only be available on Vehicle Usage Options, Vehicle Usage on Drivers and Driver Usage on Vehicles.

Flag Drvs from Flag Drvs

This flagging operation should only be performed after a flag driver function. All previously flagged drivers are in the scope and available for further flagging. An association with a predefined flag driver algorithm must be made in this function.

Flag Drvs: Assigned

All assigned drivers are in the scope and available for flagging, therefore ignoring any previously flagged drivers. An association with a predefined flag driver algorithm must be made in this function.

Flag Drvs: Unassigned

All unassigned drivers are in the scope and available for flagging, therefore ignoring any previously flagged drivers. An association with a predefined flag driver algorithm must be made in this function.

Flag Last Ranked Drv

This flagging operation should only be performed after a driver ranking function. It chooses the last ranked driver from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag Last Ranked Veh

This flagging operation should only be performed after a vehicle ranking function. It chooses the last ranked vehicle from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag Unassigned Vehs

All unassigned vehicles are in the scope and available for flagging, therefore ignoring any previously flagged vehicles. An association with a predefined flag vehicle algorithm must be made in this function.

Flag Veh from Flagged Veh

This flagging operation should only be performed after a flag vehicle function. All previously flagged vehicles are in the scope and available for further flagging. An association with a predefined flag vehicle algorithm must be made in this function.

Flagging Algorithms

Flagging algorithms are used in flagging functions to determine which drivers or vehicles to flag. Flagging algorithms work just like calculated variables and algorithms only they are created from the Driver Assignment Listing screen.

RateManager supports two types of flagging algorithms:

- **Flag Vehicle** algorithms
- **Flag Driver** algorithms

Both work the same in that at the end of the algorithm, you set a result equal to 1 to flag the item or 0 to not flag the item. The only difference being that **Flag Vehicle** algorithms are used to flag vehicles by setting **Vehicle Result,** while **Flag Driver** algorithms are used to flag drivers by setting **Driver Result.**

Shown below is an example of a **Flag Driver** algorithm. It uses a predefined driver calculated variable, Driver Age, to determine if it should set the **Driver Result.**

Step 1: IF Driver Age [less than] 21 then [Step 2] else [Done]
Step 2: Driver Result = 1

Vehicle Result and **Driver Result** are available from the **Available Variables, Functions, and Constants** drop down under **DA Vehicle Results** and **DA Driver Results,** respectively.

Ranking Functions

A ranking function ranks the specified items based on the specified criteria. Ranking functions are usually used prior to making an assignment determination on a specific set of drivers or vehicles.

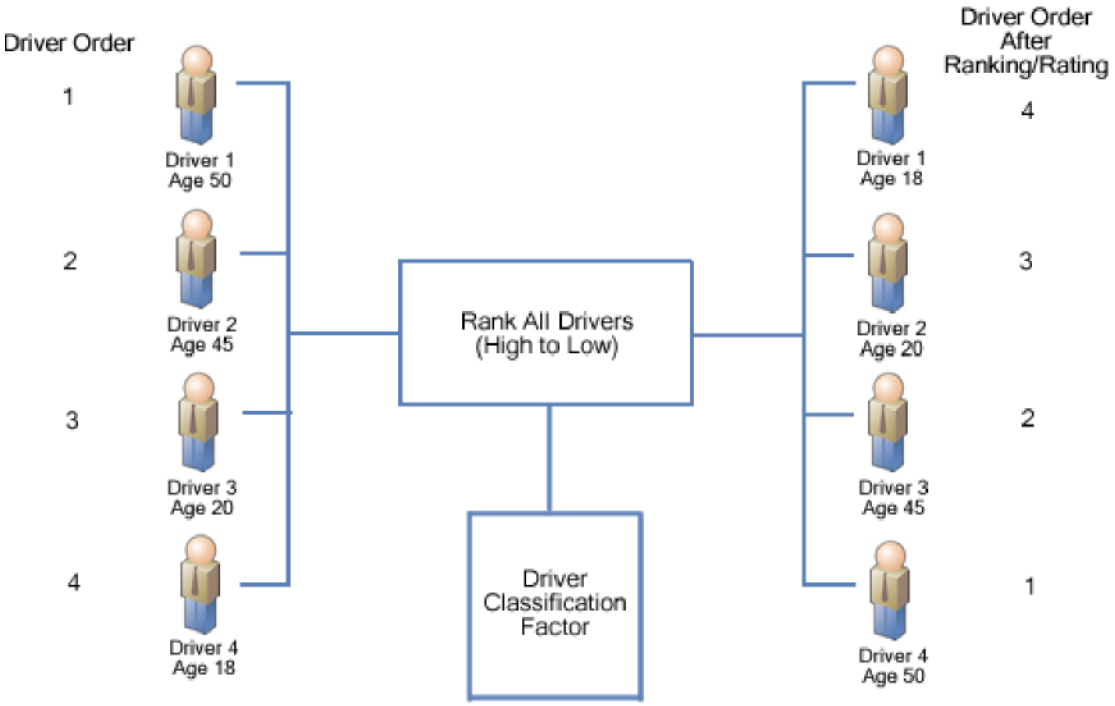


Figure 243 Ranking Functions

All ranking functions require an association with a predefined ranking algorithm, in order to determine custom criteria for ranking. For more information, see Ranking Algorithms.

Ranking functions are only available from within a driver assignment scenario.

To add a ranking function to your driver assignment scenario, select **Functions - Ranking** from the **Available Variables, Functions, and Constants** drop down and then double-click the ranking function you want to add. Since the ranking function requires an association with a ranking algorithm, a box with an asterisk (*) will appear in the step type. Replace the asterisk box with a ranking algorithm the same way you would replace an item in a calculated variable or algorithm step. The ranking algorithms are available from the **Available Variables, Functions, and Constants** drop down under **Algorithms - Rank Driver** and **Algorithms - Rank Vehicle.**

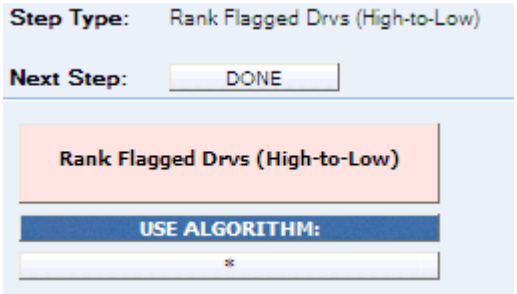


Figure 244 Adding a Ranking Function

Available Ranking Functions

Rank All Drvs (Low-to-High)

This function ranks all of the drivers, according to the specified function, in ascending order (lowest to highest).

Rank All Drivers vs. All Vehicles (Seq)

This ranking function uses the result of a Driver-Vehicle variable and ranks every possible Driver & Vehicle pair, high to low. This step should be performed prior to the 'Assign 1st Ranked Veh to 1st Ranked Driver (Seq)' assignment functions.

Rank All Drvs (High-to-Low)

This function ranks all of the drivers, according to the specified function, in descending order (highest to lowest).

Rank All Drvs (High-to-Low) (Usage Set - Conditional)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. An If step is used to test criteria in the scope of the drivers in each usage set. The drivers in each usage set are then ranked, using one of two specified functions, in descending order (highest to lowest).

Rank All Drvs (High-to-Low) (Usage Set)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. This function ranks all of the drivers in each usage set, according to the specified function, in descending order (highest to lowest). This ranking operation should be used when the Vehicle Usage Option is set to Vehicle Usage on Drivers.

Rank All Drvs (Low-to-High) (Usage Set - Conditional)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. An If step is used to test criteria in the scope of the drivers in each usage set. The drivers in each usage set are then ranked, using one of two specified functions, in ascending order (lowest to highest).

Rank All Drvs (Low-to-High) (Usage Set)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. This function ranks all of the drivers in each usage set, according to the specified function, in ascending order (lowest to highest). This ranking operation should be used when the Vehicle Usage Option is set to Vehicle Usage on Drivers.

Rank All Vehs (High-to-Low)

This function ranks all of the vehicles, according to the specified function, in descending order (highest to lowest).

Rank All Vehs (Low-to-High)

This function ranks all of the vehicles, according to the specified function, in ascending order (lowest to highest).

Rank Assigned Vehs (High-to-Low)

All assigned vehicles are in the scope and available for ranking, therefore ignoring any unassigned vehicles. Using only the current scope, it ranks all of the vehicles, according to the specified function, in descending order (highest to lowest).

Rank Assigned Vehs (Low-to-High)

All assigned vehicles are in the scope and available for ranking, therefore ignoring any unassigned vehicles. Using only the current scope, it ranks all of the vehicles, according to the specified function, in ascending order (lowest to highest).

Rank Flagged Drvs (High-to-Low)

This ranking operation should always be performed after a flag driver operation. All previously flagged drivers are in the scope and available for ranking. Using only the current scope, it ranks all of the drivers, according to the specified function, in descending order (highest to lowest).

Rank Flagged Drvs (Low-to-High)

This rating/ranking operation should always be performed after a flag driver operation. All previously flagged drivers are in the scope and available for ranking. Using only the current scope, it ranks all of the drivers, according to the specified function, in ascending order (lowest to highest).

Rank Unassigned Vehs (High-to-Low)

All unassigned vehicles are in the scope and available for ranking, therefore ignoring any assigned vehicles. Using only the current scope, it ranks the vehicles, according to the specified function, in descending order (highest to lowest).

Rank Unassigned Vehs (Low-to-High)

All unassigned vehicles are in the scope and available for ranking, therefore ignoring any assigned vehicles. Using only the current scope, it ranks the vehicles, according to the specified function, in ascending order (lowest to highest).

Ranking Algorithms

Ranking algorithms are used in ranking functions to determine how to rank drivers or vehicles. Ranking algorithms work just like calculated variables and algorithms, only they are created from the Driver Assignment Listing screen.

RateManager supports two types of ranking algorithms:

- **Rank Vehicle** algorithms
- **Rank Driver** algorithms

Both algorithms work the same in that at the end of the algorithm, you set a result equal to the value to be used for ranking. The only difference being that **Rank Vehicle** algorithms are used to rank vehicles by setting **Vehicle Result,** while **Rank Driver** algorithms are used to rank drivers by setting **Driver Result**.

Shown below is an example of a **Rank Driver** algorithm. It uses a predefined driver mapped variable, Pleasure Use Factor, to set the **Driver Result**.

Step 1: **Driver Result** = Pleasure Use Factor

Vehicle Result and **Driver Result** are available from the **Available Variables, Functions, and Constants** drop down under **DA Vehicle Results** and **DA Driver Results,** respectively.

Assignment Functions

In driver assignment, there are many ways to assign a particular driver, or set of drivers, to a particular vehicle, or set of vehicles. SoftRater assigns drivers to vehicles using assignment functions. All assignment functions are standalone, meaning they do not require an association with a predefined algorithm.

Assignment functions are only available from within a driver assignment scenario. To add an assignment function to your driver assignment scenario, select **Functions - Assignment** from the list of **Available Variables, Functions, and Constants** drop down and then double-click the assignment function you want to add.

For all assignment functions, a vehicle cannot be reassigned, e.g. if vehicle 1 was assigned to driver 1 in step 3 of the driver assignment, vehicle 1 cannot be assigned to a different driver in step 5. Also, SoftRater will not allow you to exit driver assignment without assigning a driver to each vehicle. In the event that your driver assignment scenario is finished, and vehicles remain unassigned, SoftRater will automatically assign the first driver to each of those vehicles.

Available Assignment Functions

Assign 1st Ranked Veh to 1st Ranked Drv

This assignment operation should only be performed after both a rank vehicle function and a rank driver function. It will assign the 1st or top ranked vehicle to the 1st or top ranked driver.

Assign 1st Ranked Veh to 1st Ranked Drv (Seq)

This assignment function should be performed after the 'Rank All Drivers vs. All Vehicles (Seq)' ranking function. The highest ranked Driver & Vehicle pairs are assigned until all vehicles have been assigned a driver. If the Driver & Vehicle pairs are ranked such that a driver will be assigned to more than one vehicle, this assignment function will assign the driver to multiple vehicles.

Assign 1st Ranked Veh to 1st Ranked Drv (Seq) (with Exclusion)

This assignment function should be performed after the 'Rank All Drivers vs. All Vehicles (Seq) ranking function. The highest ranked Driver & Vehicle pairs are assigned until all vehicles have been assigned a driver. If the Driver & Vehicle pairs are ranked such that a driver will be assigned to more than one vehicle, this assignment function will not assign the driver to multiple vehicles, skipping the Driver & Vehicle pair until all vehicles have been assigned unique drivers.

Assign 1st Ranked Veh to 1st Ranked Drv (Usage Set)

This assignment operation should only be performed after both a Rank Vehicle function and a Rank Drivers (Usage Set) function. It will assign the 1st or top ranked vehicle to the 1st or top ranked driver in the vehicle's usage set.

This ranking option will only be available on Vehicle Usage Options, Vehicle Usage on Drivers and Driver Usage on Vehicles.

Assign 1st Ranked Veh to 1st Ranked Drv (with Exclusion)

This assignment function should be performed after a Rank Vehicle function and a Rank Driver function. The highest ranked driver will be assigned to the highest ranked vehicle, then the second-highest ranked driver will be assigned to the second-highest ranked vehicle, and so on. Each driver will be assigned to only one vehicle in this assignment function. An additional assignment function will need to be included to handle unassigned vehicles.

Assign 1st Ranked Veh to Flag Drv

This assignment operation should only be performed after both a rank vehicle and flag driver function. It will assign the 1st or top ranked vehicle to the flagged driver. If multiple drivers are flagged, the first driver that was flagged will be assigned to the 1st ranked vehicle.

Assign All Vehs by Princ Op (Drvs NONEXCLUSIVE)

This assignment operation is performed after the **Set Principal Operator Variable** function, unless the principal operator indicator is passed as an input (input ID 253). This assignment operation assigns all drivers to the vehicle they principally drive. The assignment will be performed nonexclusively, meaning that if a driver is the principal operator on more than one vehicle, the driver will be assigned to each one.

Assign Flag Drv to all Unassigned Vehs

This assignment operation should only be performed after a flag driver function. It will assign the currently flagged driver to all unassigned vehicles. If multiple drivers are flagged, the first driver that was flagged will be assigned to all unassigned vehicles.

NOTE	This function is usually used in left over vehicle situations.

Assign Flag Drv to first Unassigned Veh

This assignment operation should only be performed after a flag driver function. It will assign the currently flagged driver to the 1st unassigned vehicle, based on vehicle order. If multiple drivers are flagged, the first driver that was flagged will be assigned to the first unassigned vehicle.

NOTE	This function is usually used in left over vehicle situations, where there are different criteria for each left over vehicle depending on the number.

Assign Unassigned Vehs by Princ Op (Drvs EXCLUSIVE)

This assignment operation is performed after the **Set Principal Operator Variable** function, unless the principal operator indicator is passed as an input (input ID 253). This assignment operation assigns all unassigned vehicles to the driver that principally operates them. The assignment will be performed exclusively, meaning that if a driver is the principal operator on more than one vehicle, the driver will be assigned to only the first vehicle they principally operate, and if that vehicle is already assigned, the driver will not be assigned in this step.

Assign Unassigned Vehs by Princ Op (Drvs NONEXCLUSIVE)

This assignment operation is performed after the **Set Principal Operator Variable** function, unless the principal operator indicator is passed as an input (input ID 253). This assignment operation assigns all unassigned vehicles to the driver that principally operates them. The assignment will be performed nonexclusively, meaning that if a driver is the principal operator on more than one vehicle, the driver will be assigned to each vehicle they principally operate.

Assign Veh Usually Driven (All) by Flag Drv

This assignment operation should only be performed after a flag driver function. It will assign the flagged drivers to the vehicle(s) they operate most frequently. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles. If multiple flagged drivers principally operate the same vehicle, the driver that appears first in the input file will be assigned to the vehicle.

Assign Veh Usually Driven (All) by Ranked Drv (All) (High-to-Low)

This assignment operation should only be performed after a rank driver function. It will assign all ranked drivers to all vehicle(s) they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles. The set of driver/vehicle usage inputs used is determined by the Vehicle Usage Option selected on the Driver Assignment Scenario.

Assign Veh Usually Driven (All) by Ranked Drv (All) (Low-to-High)

This assignment operation should only be performed after a rank driver function. It will assign all ranked drivers to all vehicle(s) they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles. The set of driver/vehicle usage inputs used is determined by the Vehicle Usage Option selected on the Driver Assignment Scenario.

Assign Veh Usually Driven (All) by Ranked Drv (High-to-Low)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle(s) they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the

same amount of time, the driver will be assigned to each of those vehicles.

Assign Veh Usually Driven (All) by Ranked Drv (Low-to-High)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle(s) they operate most frequently. Assignment will start with the lowest ranked driver and work up to the highest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles.

Assign Veh Usually Driven by Flag Drv

This assignment operation should only be performed after a flag driver function. It will assign the flagged drivers to the vehicle they operate most frequently. In the event a driver operates more than one vehicle the same amount of time, the driver will not be assigned to any vehicles. If multiple flagged drivers principally operate the same vehicle, the driver that appears first in the input file will be assigned to the vehicle.

Assign Veh Usually Driven by Ranked Drv (High-to-Low)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will not be assigned to any vehicles.

Assign Veh Usually Driven by Ranked Drv (Low-to-High)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle they operate most frequently. Assignment will start with the lowest ranked driver and work up to the highest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the lowest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will not be assigned to any vehicles.

Assign Veh Usually Driven by Unassigned Drvs

This assignment operation will assign drivers that have not been assigned, to the vehicle they operate most frequently. If multiple unassigned drivers principally operate the same vehicle, the driver that appears first in the input file will be assigned to the vehicle.

Assign Vehs by Drv Usage using Last Ranked Veh

This assignment operation should only be performed when the Vehicle Usage Option is set to **Driver Usage on Vehicles.** It also should only be performed after a rank vehicle function. It will assign vehicles, starting with the last ranked vehicle, to the driver that operates the vehicle most frequently.

Assign Vehs by Drv Usage using 1st Ranked Veh

This assignment operation should only be performed when the Vehicle Usage Option is set to **Driver Usage on Vehicles.** It also should only be performed after a rank vehicle function. It will assign vehicles, starting with the 1st ranked vehicle, to the driver that operates the vehicle most frequently.

Assign Vehs Using DA Override Inputs

This assignment operation will assign drivers to vehicles based on the information passed in the input file. It requires three inputs:

- The Vehicle input AssignmentOverride (input ID 400), which is used to signal that the vehicle's assignment can be overridden. Use a 1 to indicate that the assignment can be overridden or a 0 to indicate that the assignment cannot be overridden.

- The Driver input DriverID (input ID 367), which contains a driver number for the current driver.
- The Vehicle input AssignedDriver (input ID 17), which contains the number of the driver (based on DriverID) that should be assigned to the current vehicle.

Miscellaneous Functions

In driver assignment, there are a few functions that do not fit into a particular category. All miscellaneous functions are standalone, meaning they do not require a predefined algorithm.

Miscellaneous functions are only available from within a driver assignment scenario.

To add a miscellaneous function to your driver assignment scenario, select **Functions - Miscellaneous** from the list of **Available Variables, Functions, and Constants** drop down and then double-click the miscellaneous function you want to add.

Available Miscellaneous Functions

Clear Drv Ranking

When ranking drivers, the system allows for cascading ranking operations. This function breaks the cascading ranking that is inherent when using back-to-back ranking operations. This clear function should always be performed after a rank driver operation, when cascading is not desired.

Clear Drv Ranking (Usage Set)

When ranking drivers, the system allows for cascading ranking operations within a usage set. This function breaks the cascading ranking that is inherent when using back-to-back ranking operations. This clear function should always be performed after a Rank Driver (Usage Set) operation, when cascading is not desired.

Clear Veh Ranking

When ranking vehicles, the system allows for cascading ranking operations. This function breaks the cascading ranking that is inherent when using back-to-back ranking operations. This clear function should always be performed after a rank vehicle operation, when cascading is not desired.

Separating Driver and Vehicle Output (Auto LOB Only)

By default, once Driver-Assignment is complete, there are no longer drivers and vehicles there are only driver-vehicle pairs.

The advantages to this are:

1. You can use driver and vehicle level elements (inputs, variables and results) inside of variables and algorithms, without having to specify which driver or vehicle to use. For example, if you have a class factor that depends on the assigned driver's age, as well as the vehicles use code, you would set up the class factor as a driver-level variable. SoftRater would then automatically use the correct driver and vehicle information.

2. The result XML will show all drivers, vehicle and driver-vehicle elements together. For example, if you output the driver age, it would show up under the vehicle that driver is assigned to.

The disadvantage is that once Driver-Assignment is complete, you can no longer use any elements for drivers that did not get assigned to a vehicle. For example, if driver 3 has 3 points, but did not get assigned to a vehicle, then after Driver-Assignment, those 3 points will no longer be available. While it is possible to account for those 3 points before Driver-Assignment, it often gets messy and difficult to maintain.

To remedy this, RateManager allows the user to instruct SoftRater to separate the driver and vehicle elements, while keeping the association between them. This keeps the first advantage shown above and fixes the disadvantage. However, in doing this, the driver and vehicle elements no longer show together on the result XML. Since they do not show together, the user has no way of knowing which driver got assigned to which vehicle, unless additional information is returned. You can return that additional information by following the steps below.

How to Identify the Vehicle a Driver is Assigned to and Vice Versa

1. Start by creating result variables to hold the information. You will probably want the following results:

Result Variable Name	Working Category	Type	Description
Assigned Vehicle Number	Driver	Integer	Holds the number of the vehicle that the current driver was assigned to
Assigned Driver Number	Vehicle	String	Holds the number of the driver that was assigned to the current vehicle

2. Next, create an algorithm to set the result variables.

Algorithm Name	Working Category	Description
Get Assignment Information	Driver-Vehicle	Sets the result variables Assigned Vehicle Number and Assigned Driver Number

Step Number	Type	Step
Step 1	Arithmetic	Assigned Vehicle Number (driver result) = VehicleID (vehicle input)
Step 2	String Addition	Assigned Driver Number (vehicle result) = DriverID (driver input)

3. Finally, add the new algorithm to the Sequencing, after the Driver-Assignment scenario.

Order	Name
1	abc
2	def
…	…
n	Driver Assignment
n + 1	Get Assignment Information
…	…

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Introduction to Globals

Any variable, algorithm, underwriting rule, or driver assignment scenario can be created as a global and be used throughout all programs under a subline. In addition, inputs and result variables are defined as globals.

Globals are subline specific and should be used only if the item being created is identical across all programs in which it is used. When a global is changed, it will automatically update in every program.

For example, if your violation coding is standard and used in every program in the subline, a global mapped variable can be created and used as an established option for all of the programs in the subline. This is also optimal for maintenance.

NOTE	Globals can be an efficient way to reduce program implementation time when creating multiple programs within a single subline.

Types of globals are:

- Global Inputs
- Global Variables
  - Result
  - Mapped
  - Calculated
- Global Algorithms
- Global Driver Assignment Scenarios and Algorithms

Global inputs, variables, algorithms, and driver assignments can be created by the user or brought in from a template. Globals that are user created will be open for editing, copying, and deletion if they are not locked. Globals that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New globals can be added to a template generated subline and you will be able to create new revisions. These new globals will be open for editing, copying or deletion, unless the program version is locked.

Global Inputs

Global inputs provide a way for you to pass information into the SoftRater engine. For the auto line of business, a few inputs were created when RateManager was installed. These inputs are system inputs needed for driver assignment and they cannot be edited or deleted. For example, VehPrincipallyDriven (id=299) is a system input. On the **Global Input Listing,** system inputs are grayed out and cannot be edited, copied or deleted.

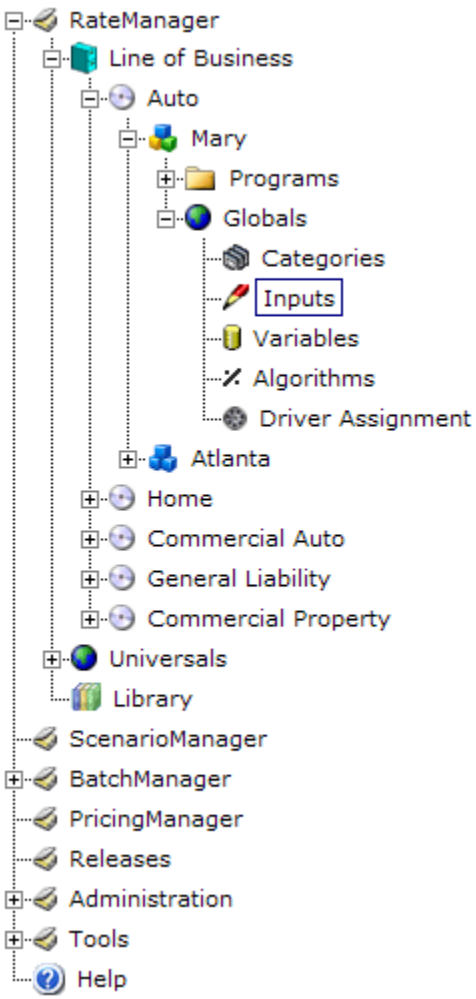
A lock icon indicates that this input is locked by either a program or a template and is not open for copying, editing or deleting. If the input is locked because the program is locked, you must return to the program and unlock it. This will unlock the input and changes can be made. If the input is locked because it came from a template, you will not be able to unlock the input. You can create a new input if necessary.

NOTE	For the purposes of this manual, an input will be shown like this: Input.

Global inputs can be created inside of a program with limited category options. These inputs will be displayed on the Global Input Listing screen. Changes can be made to these inputs from the global input screen only.

Navigating to Global Inputs

1. From the menu tree, select the subline where you want to create an input. Click **Globals** to expand it and then click **Inputs**.



2. This will open the **Global Input Listing**.

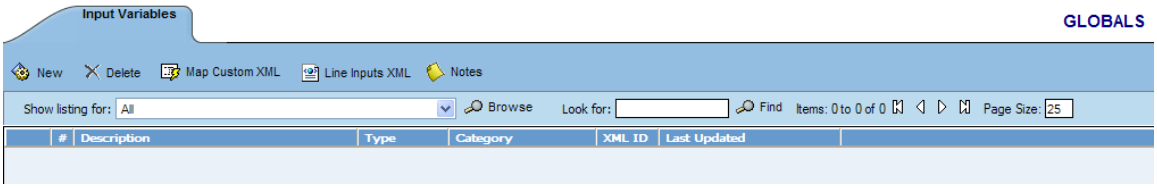


Figure 245 Global Input Listing

Navigation Bar

New: Begins the process of creating a new input.

Delete: Deletes the selected input.

Map Custom XML: Opens a window that allows a user to create a mapping that will transform the output XML. See Introduction to Input and Output Mapping for more information.

Line Inputs XML: View the XML for the input.

Notes: Allows you to enter, edit and view notes to the input.

Show Listing For: Allows you to filter the type of input variable shown. You also can browse by category by clicking the Browse button. This will bring up the Browse Category popup.

Look For: Allows you to narrow the list of inputs. To do this, type in a part or the entire name of the input you are looking for and click Find. To re-show all inputs, clear this box and select Find.

Page Size: Allows you to customize the number of inputs displayed per page and move back and forth between pages. Also displays the total number of inputs that match the criteria in both the Show Listing For box and the Look For box.

	Move to the first page
	Move back one page
	Move forward one page
	Move to the last page

Column Sorting: You can sort inputs by individual column headers. The default view is alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Input Variable Listing

The first column will indicate if the input is locked and if any notes have been added.

#: Indicates the number of the input returned for the selected criteria.

Description: The name of the input variable.

Type: The type of input variable, i.e. date, decimal, integer or string.

Category: The category of the input variable.

XML ID: The XML ID that is used to call the input.

Last Updated: The date and time of the last update.

Creating a New Global Input

In order to create a new global input, you must have your categories setup. See Introduction to Working Categories for more information. RateManager automatically sets up a Policy category for each subline. Inputs can be template generated or created by you. Template generated inputs will be grayed out and locked. They are not open for editing, copying or deletion. A new input can be added to a template generated subline if needed.

To Create a New Global Input Variable

1. Navigate to the **Global Input Variable Listing** for the subline where you want to create a new input.
2. Click New. This will open the **New Input Variable** popup.

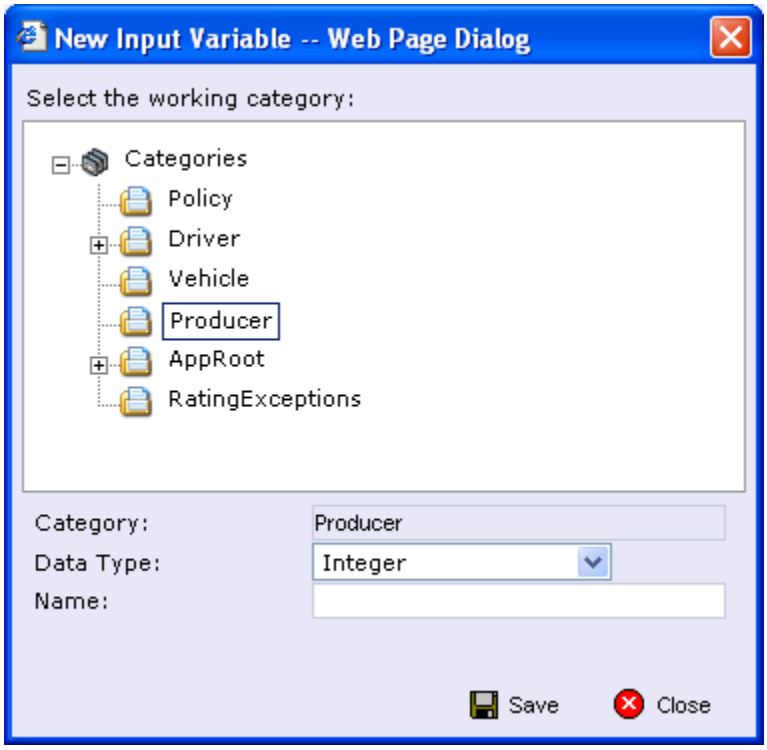


Figure 246 Global Input Variable Popup

3. Double click the category you want the new input variable to fall under. The pathway will be displayed in the Category field. If Policy is the only category, you must return to Categories and create the one you need. On the tree view, the final destination where the new input will be placed will have a box around it.

4. Select a **Data Type** from the drop down menu.

5. Enter in a **Name**. Click Save to save your input. The screen will refresh and the new input will be displayed on the Input Variables screen. An XML ID will automatically be assigned for the new input variable.

Editing a Global Input

Unlocked global input variables can be edited at any time. If the input is locked because the program is locked, you must return to the program and unlock it. Once unlocked, changes can be made. If the input is locked because it came from a template, you will not be able to unlock the input. System input variables will be grayed out and are not available for editing at any time.

To Edit a Global Input Variable

1. Navigate to the **Global Input Variable Listing** for the subline that contains the input you want to edit.

2. Either double click the input you want to edit or right click and select **Edit**. This will open the **Edit Input Variable** popup.

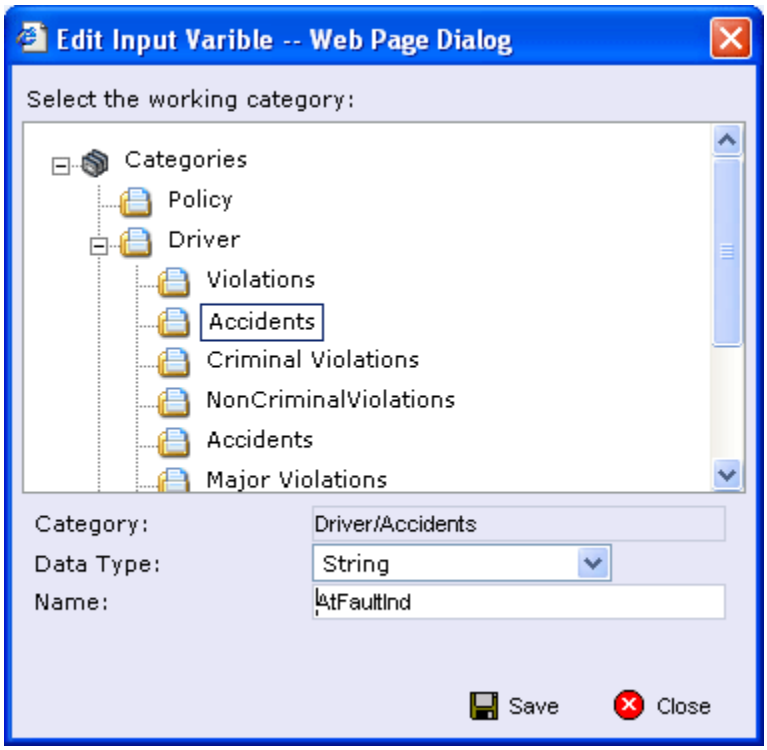


Figure 247 Editing Global Input Variable

6. To change the **Category**, double click the category you want the input to fall under. The pathway will be displayed in the Category field. On the tree view, the final destination where the input will be placed will have a box around it.

7. Make any changes to the **Data Type** and **Name**.

8. Click Save to save your changes.

Copying a Global Input

Any unlocked input variable can be copied at any time. The input will be copied with the exact same type and category. To make a change to the input, you must go into the edit screen. System generated, template generated, and locked inputs cannot be copied.

To Copy a Global Input Variable

1. Navigate to the **Global Input Variable Listing** for the subline that contains the input you want to copy.

2. Right click the input you want to copy. Select **Copy Variable.** The Copy Input Variable popup will be displayed.

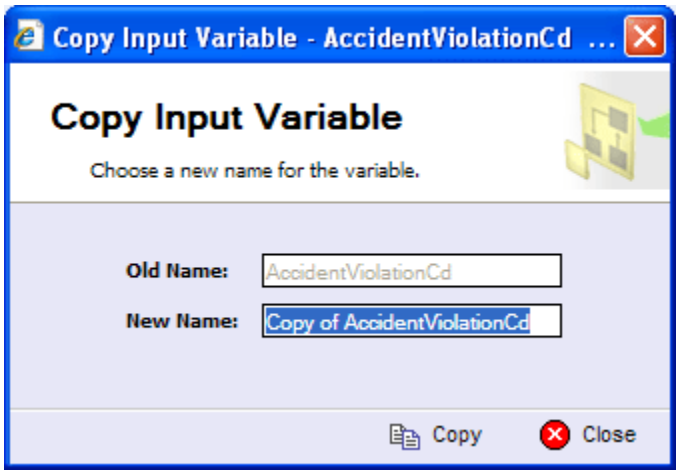


Figure 248 Copying Global Input Variable

3. Enter in a **New Name**.

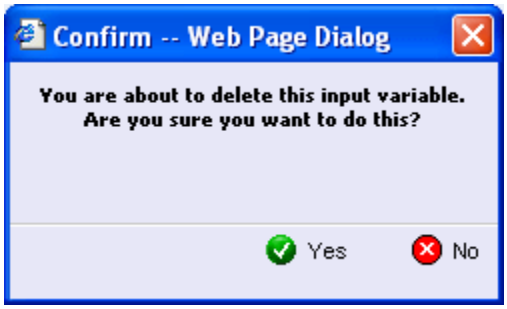
4. Click **Copy** to copy your input. The screen will refresh and the copied input will be displayed on the Input Variables screen. An XML ID will automatically be assigned for the input.

Deleting a Global Input

Any unlocked input variable that is not in use can be deleted. Inputs that are in use, locked, system generated or template generated cannot be deleted. If you try to delete an input that is unavailable for deletion, an error message will be displayed informing you where the inputs are being used. Locked, system generated, and template generated inputs will be grayed out.

NOTE	Take care when deleting Inputs, this action cannot be undone.

1. Global inputs can be deleted by right clicking the input and selecting **Delete** or by highlighting the input and clicking the delete button in the top bar menu.



2. A confirmation message will be displayed.

3. Click **Yes** to delete or **No** to cancel. If the input is being used, you will not be able to delete. A message will be displayed informing you where the input is being used.

Right Click Menu Options

To view right click menu options, highlight the input you want to view and right click.

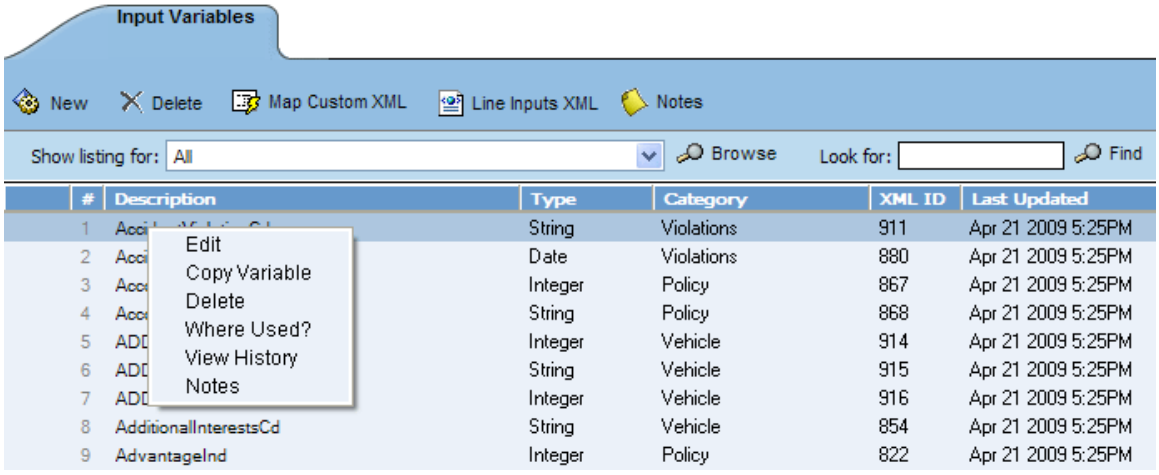


Figure 249 Global Input Variable Right Click Menu

Unlocked global input variables will have six right click menu options:

- **Edit:** Clicking Edit will bring up the edit screen for the input.
- **Copy Variable:** Clicking Copy will bring up the copy screen for the input. Enter in a new name and the input will be copied and placed in the listing.
- **Delete:** Clicking Delete will remove the input from the list. A warning message will be displayed to confirm the deletion.
- **Where Used?:** Clicking Where Used will display an information screen that details where the variable is being used. See Where Used for more information.
- **View History:** Click to view the Audit History. See View History for more information.
- **Notes:** Allows you to enter, edit and view notes for the input.

Template Locked input variables will have three options, Copy Variable, Where Used? and Notes.

Program Locked input variables will have two options, Where Used? and Notes.

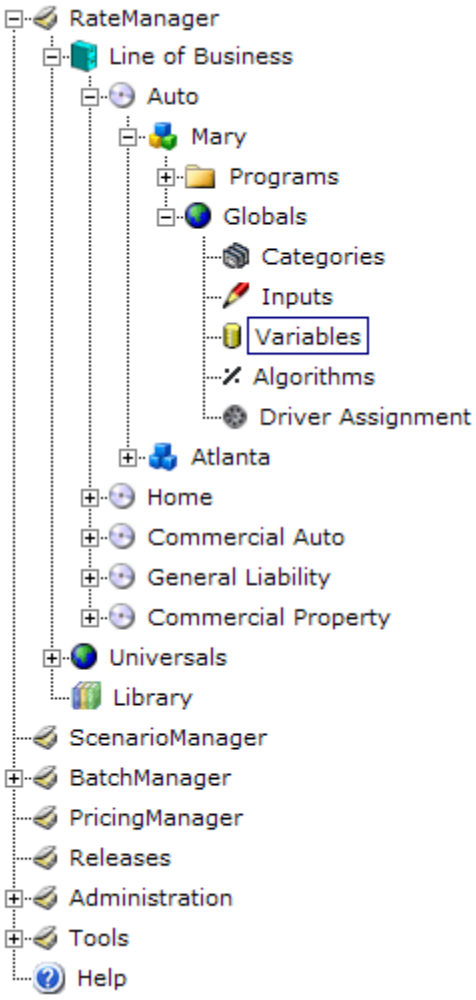
Global Variables

When a variable is created under a specific program, it is referred to as a local variable. When a variable is created that applies to all programs under the subline, it is referred to as a *global variable*. If used properly, global variables can greatly reduce the time taken to load and maintain the same tables or logic in multiple programs. Global Variables can be either result, mapped or calculated.

Variables, regardless of type, can be created by the user or brought in from a template. Variables that are user created will be open for editing, copying, and deletion if they are not locked. Variables that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New variables can be added to a template and copies can be made of locked variables. New variables and copies will be open for editing, copying or deletion.

Navigating to Global Variables

1. From the menu tree, select the subline where you want to create a variable. Click **Globals** to expand it and then click **Variables**.



2. This will open the **Global Variable Listing**, which is similar to the local Variable Listing.

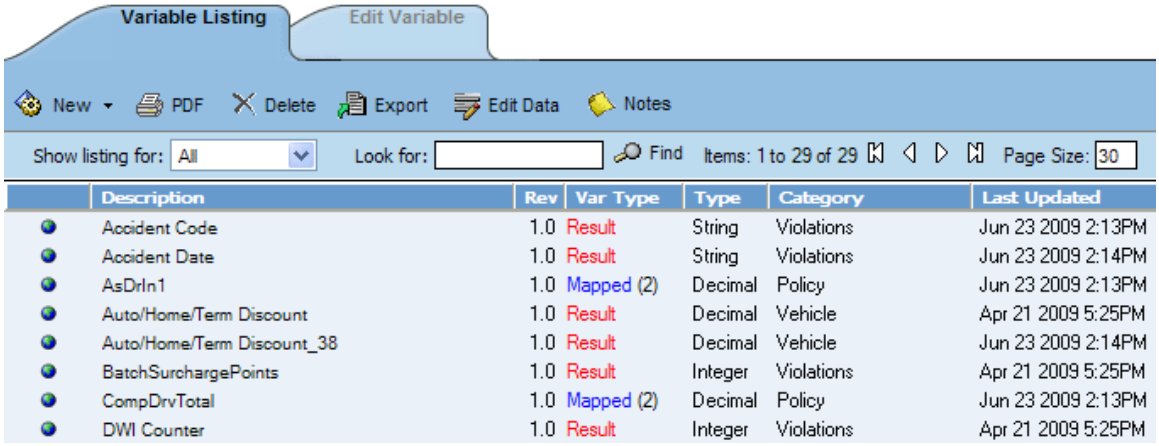


Figure 250 Global Variable Listing Screen

Navigation Bar

Edit Variable Tab: Used to navigate to the edit variable screen for the currently selected variable. You also can double-click a variable to edit it. See Editing a Mapped Variable or Editing a Calculated Variable for more information.

New: Begins the process of creating a new variable: mapped, calculated or result.

PDF: Generates a PDF of the data table for the currently selected mapped variable.

Delete: Removes the selected variable from the program. If the variable is being used in an algorithm, variable or result group, you will receive an error message.

Export: Allows you to export the contents of the currently selected mapped variable, and any variables linked to it, to a tab-delimited file. See Exporting a Table for more information.

Edit Data: Shows the data table for the current mapped variable. The data table can be used for verification and quick editing purposes. Data can be changed and rows added or deleted from this screen. See Editing Data in a Table for more information.

Notes: Allows you to enter, edit and view notes for the variable.

Show Listing For: Allows you to filter the type of variables shown.

- **All** will show all variables.
- **Mapped Vars** will show all mapped variables.
- **Calc Vars** will show all calculated variables.
- **Result Vars** will show all result variables.

Look For: Allows you to narrow the list of variables. To do this, type in part or all of, the name you are looking for and click

. To re-show all the variables, clear this box and select

.

Page Settings: Allows you to customize the number of variables displayed per page and move back and forth between pages. Also displays the total number of variables that match the criteria in both the Show Listing For box and the Look For box.

Column Sorting: You can sort variables by individual column headers. The default view is alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Variable Listing

A list of all variables available to the subline, sorted alphabetically. A icon indicates the variable is a global variable. A lock icon indicates that this variable is locked by either a program or a template.

Description: Name of the variable. If a number in parenthesis follows the variable name, it indicates the total number of variables, including this one, that are linked together.

Rev: Shows the revision.

Var Type: Shows whether the variable is a mapped, calculated or result variable.

Type: Displays the data type of the variable, i.e. Integer, Decimal, Date or String.

Category: Displays the working category of the variable.

Last Updated: Time stamp of the last time the variable was saved. In the case of mapped variables, editing the data table will also update the time stamp.

Creating a New Global Variable

A globe icon is used to indicate a global variable. Global variables are created like their local counterparts with the following exceptions:

- Only other global variables or inputs may be used. You cannot use any local variables in the creation of a global variable.
- Global variables are available for use by any of the programs under the subline where the variable is defined. Select the variable from the **Available Variables, Functions and Constants** drop down menu.
- To create a **Global Mapped Variable**, see Creating a Mapped Variable. The process is the same for a global mapped variable as it is for a local mapped variable.
- To create a **Global Calculated Variable**, see Creating a Calculated Variable. The process is the same for a global calculated variable as it is for a local calculated variable.

Creating a Global Result Variable

Result variables are used as placeholders for the end result of an algorithm. This includes premiums, underwriting rule messages and policy specific information such as tier name selected, and fees. It is recommended that result variables be created prior to building a program, so that these will be in place for selection from the drop down listings when you need them in your calculation sequence.

Global result variables can be created inside of a program with limited category options. When you create a global result variable in the global variables screen you can select the category.

1. Navigate to the **Global Variable Listing** for the subline where you want to create a new variable.
2. Select New from the menu bar and select **Result Variable** from the popup menu. This will open the **New Result Variable** window.

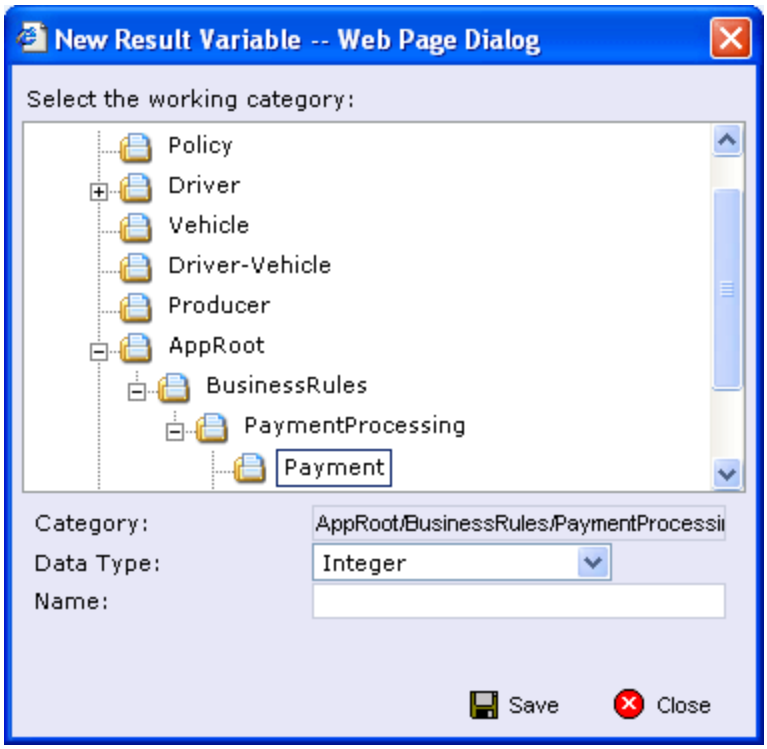


Figure 251 New Result Variable

3. Select the **Category Pathway**. The pathway will be displayed in the Category field. On the tree view, the final destination where the new variable will be placed will have a box around it.

4. Select the **Data Type** (date, decimal, integer or string) from the drop down menu.

5. Enter a **Name** for the new result variable.

6. Click Save when you are finished to update the variable listing. The result variable can now be used to hold the result of an algorithm.

Editing a Global Variable

Global variables can be edited from the global variable listing screen or from a program variable listing screen and are edited like their local counterparts. Unlocked global variables can be edited at any time. To edit a locked global variable, you must return to the locked program and unlock it. Variables that were brought in from a template will be locked at all times and cannot be unlocked. A new variable can be created if necessary.

NOTE	If a change is made to a global variable, the change affects all programs that use the global variable. If a change only needs to be made to one particular program, create a local variable in the program and have the program reference the local variable instead of the global.

- To edit a **Global Mapped Variable**, see Editing a Mapped Variable. The process is the same for a global mapped variable as it is for a local mapped variable.
- To edit a **Global Calculated Variable**, see Editing a Calculated Variable. The process is the same for a global calculated variable as it is for a local calculated variable.

To Edit a Global Result Variable

1. Navigate to the **Global Variable Listing** for the subline that contains the variable you want to edit.
2. Double click the variable you want to edit. This will open the **Edit Result Variable** popup.

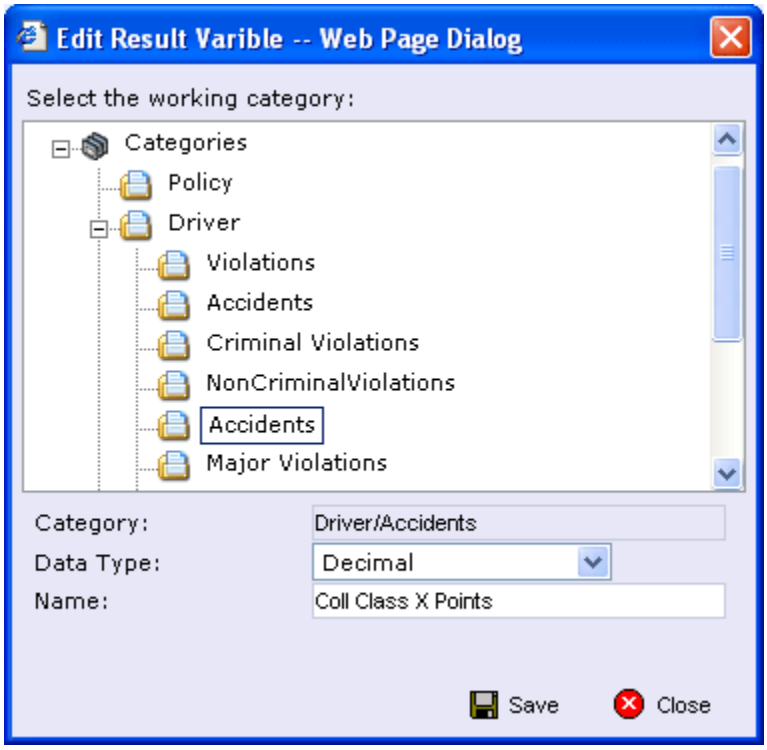


Figure 252 Editing Global Result Variable

3. To change the **Category**, double click the category you want the variable to fall under. The pathway will be displayed in the Category field. On the tree view, the final destination where the variable will be placed will have a box around it.
4. Make any changes to the **Data Type** and **Name**.
5. Click Save to save your changes.

Copy a Global Variable

Any global variable can be copied at any time. The global variable will be copied with the exact same type and category. The copied variable will be open for editing. To make a change to the variable, you must go into the edit screen.

A copied global calculated variable and a global result variable will require a new name. No other information will be required.

When copying a mapped global variable, there are three copy options:

> **Copy Definition Only** – Only the variable definition, the structure of the mapped variable (including the data type, default value, working category and criteria definitions) will be copied, but not the data, within the current program.
>
> **Copy Definition & All Data** – The mapped variable and all associated table data will be copied to the new variable within the current program.
>
> All linked variables associated with the variable may be copied by checking the **Copy linked variables** check box on the copy variable popup box. If you do not choose to copy all linked variables, the system will only copy the linked variable that is being used in the variable you are copying. All other associated variables will not be copied. If this option is grayed out, no linked variables are available to copy.

For calculated and result variables, no data options are available.

Creating a Global Variable Revision

Only unlocked mapped and calculated variables can have new revisions added. Result variables do not have revisions. If a variable is locked, you must copy it and then you can make a new revision from the copy.

To Create a Global Variable Revision

1. Navigate to the **Global Variable Listing** screen for the program that contains the variable where you want to create a new revision.
2. Select the variable you would like and right click. Select **Show/Hide Revisions** from the popup menu.

Figure 253 Selecting a Global Variable to Revise

3. Select the revision you would like the new revision based on and right click. Select **New Revision** from the menu.

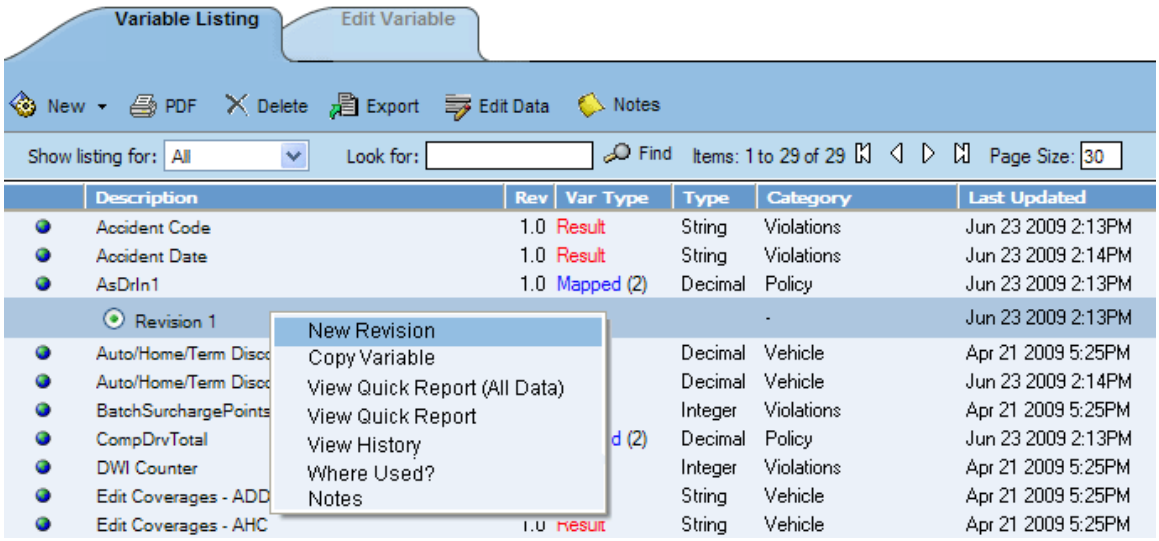


Figure 254 Revising a Global Variable

4. The new revision will be created as the next available revision number and the listing will refresh. For mapped variables you may get a confirmation box asking you if you would like to include any data found. You will have to select yes or no to continue.

Changing the Active Revision of a Global Variable

For local variables, you can set the active revision on the variable listing screen. For global variables, you set the active revision in the program. The default active revision is revision 1. If there is another revision that you want to use, go into the program and set the revision there. You cannot change the active revision in the global variable screen.

Deleting a Global Variable

Any unlocked global variable that is not in use can be deleted. Global variables that are in use, locked, or template generated cannot be deleted. If you try to delete a global variable that is unavailable for deletion, an error message will be displayed informing you where the global variable is being used. Locked and template generated variables will be grayed out.

A lock icon indicates that this variable is locked by either a program or a template and is not open for editing or deleting.

Global variables can be deleted from the global variable listing screen or from a program variable listing screen.

1. Global variables can be deleted by right clicking the variable and selecting **Delete** or highlighting the variable and clicking the delete button in the top bar menu.

2. A confirmation message will be displayed.

3. Click **Yes** to delete or **No** to cancel. If the variable is being used, you will not be able to delete. A message will be displayed informing you where the variable is being used.

NOTE	Take care when deleting global variables, this action cannot be undone.

Right Click Global Variable Menu Options

Right click menu options depend upon the type of variable, whether or not the variable is locked and what kind of lock.

- Mapped Variables – Unlocked have 11 options
- Mapped Variables – Template Locked have 10 options, Program Locked have 8 options
- Calculated Variables – Unlocked have 8 options
- Calculated Variables – Template Locked have 7 options, Program Locked have 5 options
- Result Variables – Unlocked have 5 options
- Result Variables – Template Locked have 4 options, Program Locked have 3 options

The available options are not unique, meaning that the 7 options of a template locked calculated variable can be found in the list of 11 options of an unlocked mapped variable.

Figure 255 Right Click Menu for Global Variable

Available global variable right click menu options are:

- **Copy Variable** – Clicking Copy will bring up the copy screen for the variable. Not available on program locked variables.
- **Delete** – Clicking Delete will remove the variable from the list. A warning message will be displayed to confirm the deletion. Not available on any locked variables.
- **Show/Hide Revisions** – Clicking this option will display or hide the revision for this variable. This option is not available on program locked variables.
- **Export Data (Tab-Delimited)** – This option will export a table that places all the data from a mapped variables data table into a tab-delimited text file. You can then make changes to the file and import the data into the same variable or a different variable. This option is for locked and unlocked mapped variables only.
- **View Quick Report (All Data)** – This option is only available on mapped variables and shows all table data associated with the variable. This option is for both locked and unlocked mapped variables.
- **View Quick Report** – This option is for mapped and calculated variables. For calculated variables you will get a breakdown of steps and the variables used. For Mapped variables, the variables used and criteria will be displayed. This option is for both locked and unlocked mapped and calculated variables.
- **View Dependency Report** – A dependency report will give you a tree view of all the associated variables and how they relate to one another. This option is for both locked and unlocked mapped and calculated variables.
- **View PDF** – Generates a PDF of the data table for the currently selected mapped variable. This option is for locked and unlocked mapped variables only.
- **View History** – This option will display a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. Not available on locked variables.
- **Where Used?** – Clicking where used will display an information screen that details where the variable is being used. Available to all locked and unlocked variables.
- **Notes** – Will open up the notes screen where you can add, edit, view, and delete notes for the variable. Available to all locked and unlocked variables.

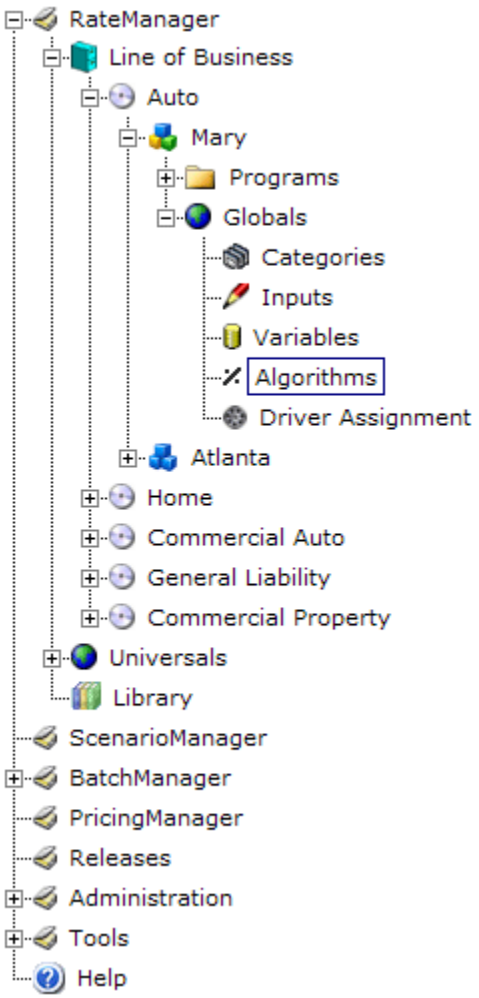
Global Algorithms

Global algorithms are like program level algorithms in the way they function and in the way they are created. In global algorithms you can create normal rating algorithms and underwriting algorithms, exactly like you can at the program level. The difference between them is that global algorithms are available to all programs within the subline while program level algorithms are available only to the program where they were created.

Global algorithms can be created by the user or brought in from a template. Global algorithms that are user created will be open for editing, copying, and deletion if they are not locked. Global algorithms that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New global algorithms can be added to a template. These new algorithms will be open for editing, copying, or deletion, unless the program version is locked.

Navigating to Global Algorithms

1. From the menu tree, select the subline where you want to create a global algorithm. Click **Globals** to expand it and then click **Algorithms**.



2. This will open the **Global Algorithms/Rules screen**, which is similar to the local Algorithm Listing. Packages cannot be created and program testing cannot be done.

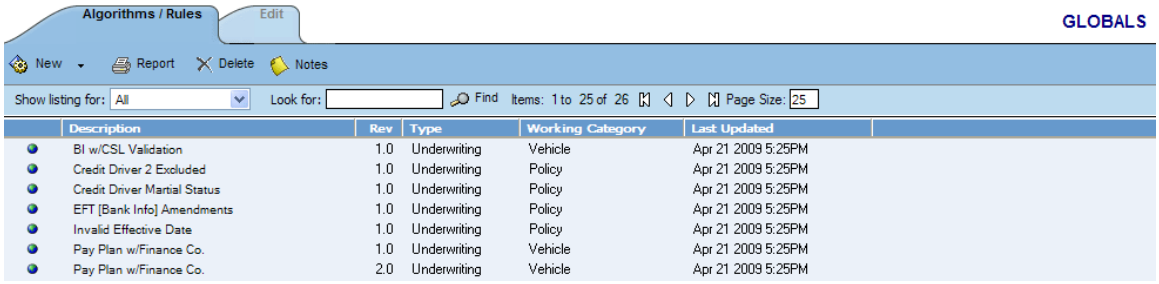


Figure 256 Global Algorithms/Rules Screen

Navigation Bar

Edit Tab: Used to navigate to the Edit Algorithm screen for the currently selected algorithm. You can also double-click an algorithm to edit it.

New: Used to create either a new normal rating algorithm or a new underwriting algorithm.

Report: Generates a Quick Report showing all the steps in the algorithm. See View Quick Report for more information.

Delete: Removes the selected algorithm from the global listing. If the algorithm is being used in any program Sequence, you will receive an error message.

Notes: Allows you to enter, edit and view notes to the algorithm.

Show Listing For: Allows you to filter the type of algorithms shown.

- **All** will show all algorithms.
- **All Used** will show all algorithms that are currently being used in any program Sequence.
- **Normal Rating** will show all normal rating algorithm.
- **Underwriting Rule** will show all underwriting algorithms.

Look For: Allows you to narrow the list of algorithms. To do this, type in a part or the entire name you are looking for and click Find. To re-show all the algorithms, clear this box and select Find.

Page Size: Allows you to customize the number of algorithms displayed per page and move back and forth between pages. Also displays the total number of algorithms that match the criteria in both the Show Listing For box and the Look For box.

Column Sorting: You can sort algorithms by individual column headers. The default view is alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Algorithm Listing

The Algorithm Listing contains a list of all algorithms available to the subline, sorted alphabetically. A globe icon indicates the algorithm is a global algorithm.

Description: Name of the algorithm.

Rev: Shows the revision of the algorithm.

Type: Displays the type of algorithm. i.e. Rating or Underwriting.

Working Category: Displays the working category of the algorithm.

Last Updated: Time stamp of the last time the algorithm was saved.

Creating a New Global Algorithm

Global algorithms are created and function in the same way as program level algorithms with the following exceptions:

- Only global variables, inputs or results may be used in a global algorithm. You cannot use any local variables.
- Global algorithms are available for use by any of the programs under the subline where the algorithm is defined.
- To create a **Global Algorithm**, see Creating a New Algorithm. The process is the same for a global algorithm as it is for a local algorithm.

Editing a Global Algorithm

Global algorithms can be edited from the global algorithm listing screen or from a program algorithm listing screen and are edited like their local counterparts. Unlocked global algorithms can be edited at any time. To edit a locked global algorithm, you must return to the locked program and unlock it. Algorithms that were brought in from a template will be locked at all times and cannot be unlocked or edited. These algorithms can have a new revision created and the new revision can be edited. A new algorithm also can be created if necessary.

- To edit a **Global Algorithm**, see Editing an Algorithm. The process is the same for a global algorithm as it is for a local algorithm.

NOTE	If a change is made to a global algorithm, the change affects all programs that use the global algorithm. If a change only needs to be made to one particular program, create a local algorithm in the program and have the program reference the local algorithm instead of the global.

Copy a Global Algorithm

Any global algorithm can be copied at any time. When copying a global algorithm, the structure of the algorithm (including the working category and steps) is copied. The copied algorithm will be open for editing. To make a change to the algorithm, you must go into the edit screen.

Unlike a program level algorithm, you will not be able to select copy options. A global algorithm will be available to all programs in the subline.

Copying a Global Algorithm

1. Select the algorithm you would like to copy and right click it. Select **Copy** from the popup menu.
2. A separate popup window will be displayed.

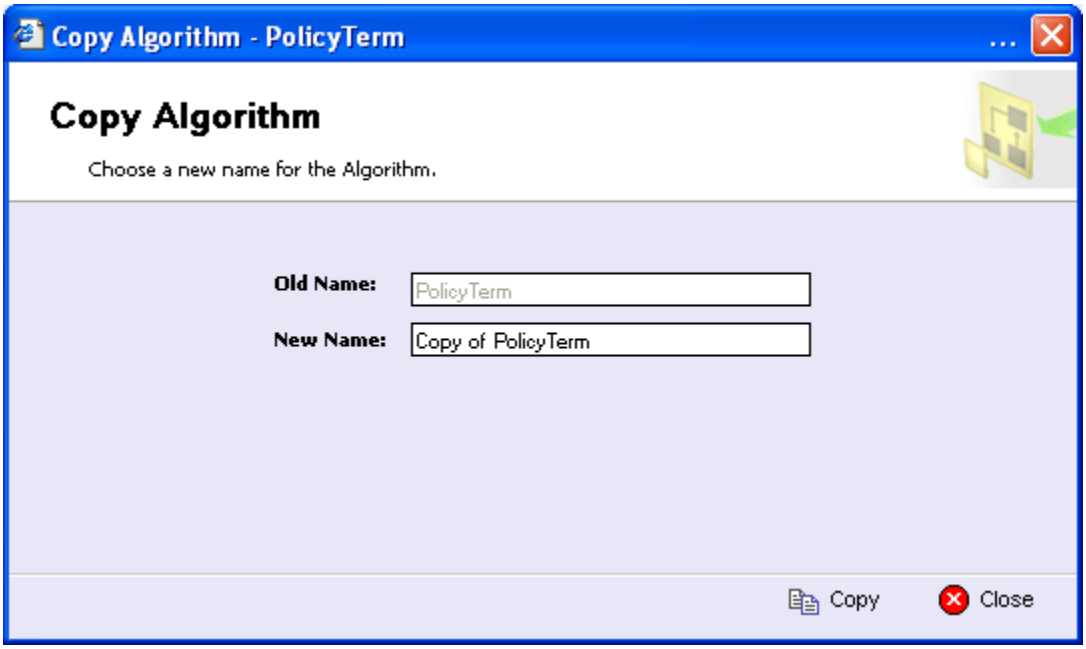


Figure 257 Copy Global Algorithm Popup

3. Enter in a **New Name**.
4. Click **Copy** to copy the algorithm. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.
5. If the copy was successful, you will be returned to the previous screen. Your algorithm will have been copied. The last updated date will be the date the copy was made.

Creating a Global Algorithm Revision

Global algorithms can have new revisions added at any time. The name on the revision will not be open for editing. All other items can be edited as needed.

- To create a **Global Algorithm Revision**, see Creating a New Algorithm Revision. The process is the same for a global algorithm as it is for a local algorithm.

Changing the Active Revision of a Global Algorithm

For local algorithms, you can set the active revision on the algorithm screen. For global algorithms, you set the active revision in the program. The default active revision is revision 1. If there is another revision that you want to use, go into the program and set the revision there. You cannot change the active revision in the global algorithm screen.

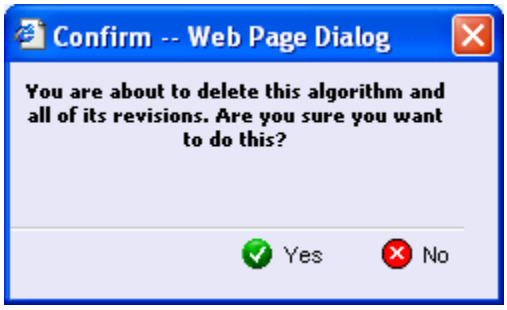
Deleting a Global Algorithm

Any unlocked global algorithm that is not in use can be deleted. Global algorithms that are in use, locked, or template generated cannot be deleted. If you try to delete a global algorithm that is unavailable for deletion, an error message will be displayed informing you where the global algorithm is being used. Locked and template generated algorithms will be grayed out.

A lock icon indicates that this algorithm is locked by either a program or a template and is not open for editing or deleting.

Global algorithms can be deleted from the global algorithm screen or from a program algorithm screen.

1. Global algorithms can be deleted by right clicking the algorithm and selecting **Delete** or highlighting the algorithm and clicking the delete button in the top bar menu.



2. A confirmation message will be displayed.

3. Click **Yes** to delete or **No** to cancel. If the algorithm is being used, you will not be able to delete. A message will be displayed informing you where the algorithm is being used.

NOTE	Take care when deleting global algorithms, this action cannot be undone.

Right Click Menu Options

The right click menu for global algorithms varies if the algorithm is locked and what kind of lock.

- Unlocked algorithms have 7 options
- Template Locked algorithms have 6 options, Program Locked algorithms have 4 options

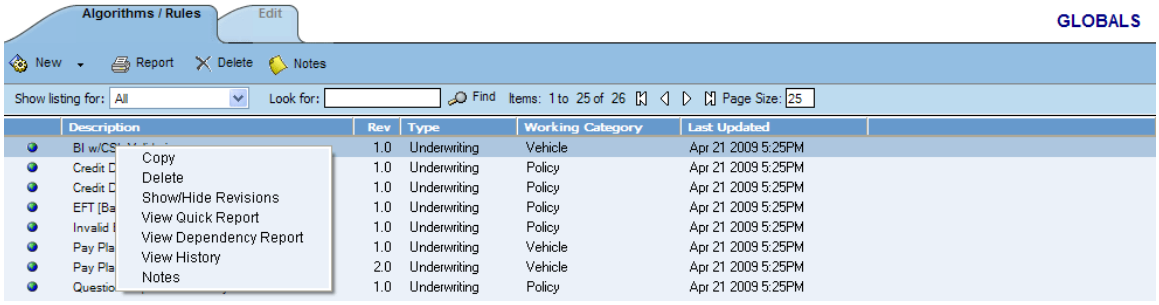


Figure 258 Right Click Menu for Global Algorithms

The available right click menu options are:

- **Copy** –Clicking Copy will bring up the copy screen for the algorithm. Enter in a new name and the algorithm will be copied and placed in the listing. Global algorithms, regardless of type, may be copied within the subline. The structure of the algorithm (including the working category and definitions) is copied. Not available on Program Locked algorithms.
- **Delete** – Clicking Delete will remove the algorithm from the list. A warning message will be displayed to confirm the deletion. Not available on any locked algorithms.
- **Show/Hide Revisions** –Clicking this option will display or hide the revision for this algorithm. Not available on Program Locked algorithms.
- **View Quick Report** –Clicking this option will display a report of the algorithm. Reports give a detailed view of the algorithm showing all of the steps and variables used. This screen will contain the program name, revision and working category.
- **View Dependency Report** – A dependency report will give you a tree view of all the associated variables and how they relate to one another within the algorithm.
- **View History** – Will display a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information.
- **Notes** – Will open up the notes screen where you can add, edit, view, and delete notes for the algorithm.

Global Driver Assignment Scenarios & Algorithms

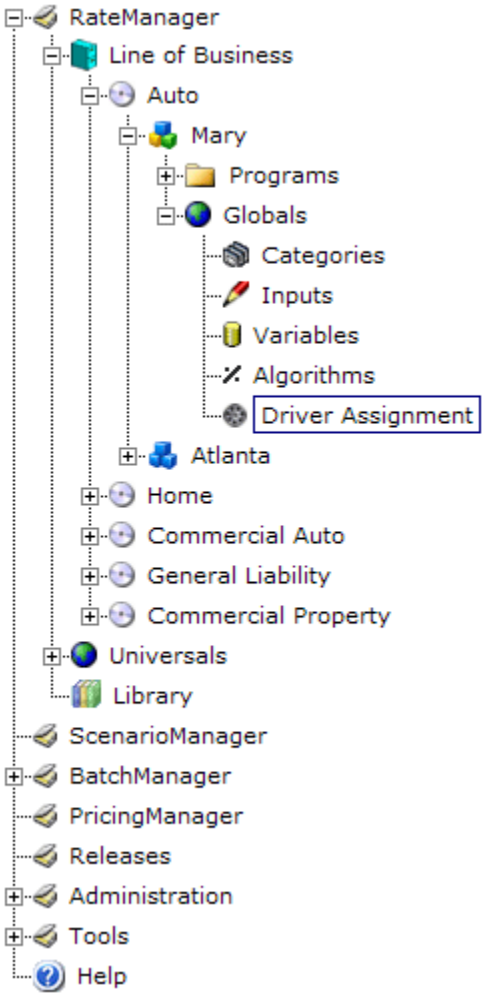
Global driver assignments are like local driver assignments in the way they function and in the way they are created. In global driver assignments you can create driver assignment scenarios and algorithms, exactly like you can at the program level. Global driver assignments are available only to programs in the auto line of business, same as the program level. The difference between them is that global driver assignments are available to all programs within the subline while program level driver assignments are available only to the program where they were created. Global driver assignments can be created by the user or brought in from a template. Global driver

assignments that are user created will be open for editing, copying, and deletion if they are not locked. Global driver assignments that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New global driver assignments can be added to a template. These new driver assignments will be open for editing, copying, or deletion, unless the program version is locked.

At the global level, packages cannot be created and program testing cannot be done.

Navigating to the Global Driver Assignment Screen

1. From the menu tree, select the auto line of business. Select the subline where you want to create a new global driver assignment. Click **Globals** to expand it and then click **Driver Assignment**.



2. This will open the **Global Driver Assignment Scenarios/Algorithm Listing**, which is similar to the local driver assignment scenarios/algorithm Listing.

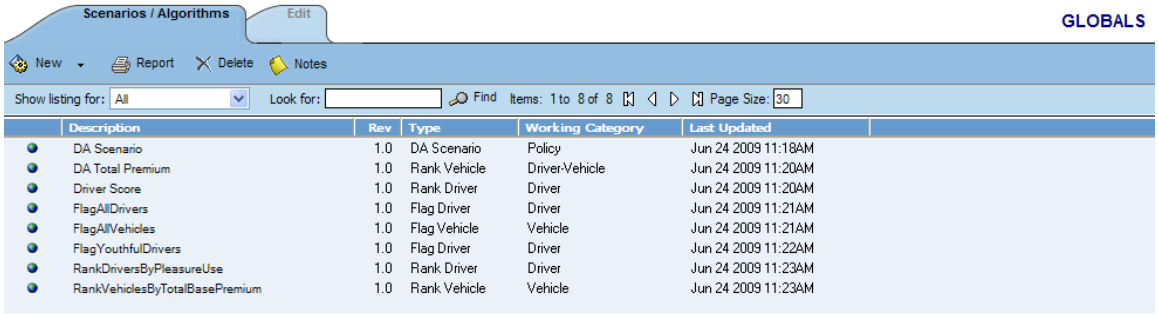


Figure 259 Global Driver Assignment Scenario/Algorithm Listing

3. Select New from the menu bar and then select a **DA Scenario** or a **Rank/Flag Driver/Vehicle Algorithm**.

4. This will open the edit driver assignment screen. See Editing a Driver Assignment for more information.

Navigation Bar

Edit Tab: Used to navigate to the Edit Driver Assignment screen for the currently selected driver assignment. You can also double-click a driver assignment to edit it.

New: Used to create a new driver assignment scenario or algorithm.

Report: Generates a Quick Report showing all the steps in the driver assignment. See View Quick Report for more information.

Delete: Removes the selected driver assignment from the global listing. If the driver assignment is being used in any program Sequence, you will receive an error message.

Notes: Allows you to enter, edit and view notes for the driver assignment scenario or algorithm.

Show Listing For: Allows you to filter for scenarios or algorithms.

- **All** will show all scenarios and algorithms.
- **DA Scenario** will show all DA scenarios.
- **Flag Driver** will show all flag driver algorithms.
- **Rank Driver** will show all rank driver algorithms.
- **Flag Vehicle** will show all flag vehicle algorithms.
- **Rank Vehicle** will show all rank vehicle algorithms.

Look For: Allows you to narrow the list of scenarios or algorithms. To do this, type in a part or the entire name you are looking for and click Find. To re-show all the scenarios or algorithms, clear this box and select Find.

Page Size: Allows you to customize the number of scenarios or algorithms displayed per page and move back and forth between pages. Also displays the total number of scenarios or algorithms that match the criteria in both the Show Listing For box and the Look For box.

Column Sorting: You can sort driver assignments by individual column headers. The default view is alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Driver Assignment Listing

The Driver Assignment Listing contains a list of all driver assignments available to the subline, sorted alphabetically. A globe icon indicates it is a global driver assignment.

Description: Name of the driver assignment.

Rev: Shows which revision of the driver assignment is used by the current program version.

Type: Displays the type of driver assignment. i.e. Scenario or Algorithm.

Working Category: Displays the working category of the driver assignment.

Last Updated: Time stamp of the last time the driver assignment was saved.

Creating a New Global Driver Assignment

Global driver assignment scenarios and algorithms are created and function in the same as program level driver assignment scenarios and algorithms with the following exceptions:

- Only global variables, inputs or results may be used in a global driver assignment scenario or global driver assignment algorithm. You cannot use any local elements.
- Global driver assignments are available for use by any of the auto programs under the subline where the driver assignment is defined.
- Only global driver assignment algorithms may be used as part of a global driver assignment function.
- To create a **Global Driver Assignment**, see Creating a New Driver Assignment. The process is the same for a global driver assignment as it is for a local driver assignment.

Editing a Global Driver Assignment

Global driver assignments can be edited from the global driver assignment scenario/algorithm listing screen or from a program driver assignment scenario/algorithm listing screen and are edited like their local counterparts. Unlocked global driver assignments can be edited at any time. To edit a locked global driver assignment, you must return to the locked program and unlock it. Driver assignments that were brought in from a template will be locked at all times and cannot be unlocked. These driver assignments cannot be edited. A new driver assignment can be created if necessary.

- To edit a **Global Driver Assignment**, see Editing a Driver Assignment. The process is the same for a global driver assignment as it is for a local driver assignment.

NOTE	If a change is made to a global driver assignment, the change affects all programs that use the global driver assignment. If a change only needs to be made to one particular program, create a local driver assignment in the program and have the program reference the local driver assignment instead of the global.

Copy a Global Driver Assignment

Any global driver assignment can be copied at any time. When copying a global driver assignment, the structure of the driver assignment (including the vehicle usage options/category and steps) is copied. The copied driver assignment will be open for editing. To make a change to the driver assignment, you must go into the edit screen.

Unlike a program level driver assignment, you will not be able to select copy options. A global driver assignment will be available to all programs in the subline.

Copying a Global Driver Assignment

1. Select the driver assignment you would like to copy and right click it. Select **Copy** from the popup menu.
2. A separate popup window will be displayed.

Figure 260 Copy Global Driver Assignment Popup

3. Enter in a **New Name**.

4. Click **Copy** to copy the driver assignment. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.

5. If the copy was successful, you will be returned to the previous screen. Your driver assignment will have been copied. The last updated date will be the date the copy was made.

Creating a Global Driver Assignment Revision

Global driver assignments can have new revisions added at any time. The name on the revision will not be open for editing. All other items can be edited as needed.

- To create a **Global Driver Assignment Revision**, see Creating a New Driver Assignment Revision. The process is the same for a global driver assignment as it is for a local driver assignment.

Changing the Active Revision of a Global Driver Assignment

For local driver assignments, you can set the active revision on the scenarios/algorithms screen. For global driver assignments, you set the active revision in the program. The default active revision is revision 1. If there is another revision that you want to use, go into the program and set the revision there. You cannot change the active revision in the global scenarios/algorithm screen.

Deleting a Global Driver Assignment

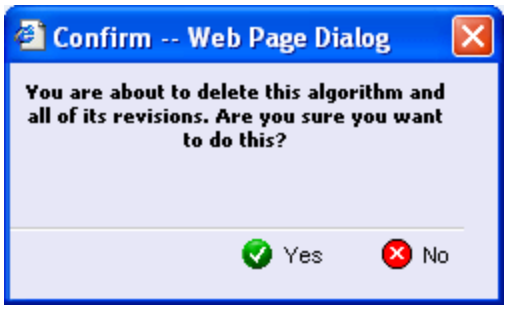
Any unlocked global driver assignment that is not in use can be deleted. Global driver assignments that are in use, locked, or template generated cannot be deleted. If you try to delete a global driver assignment that is unavailable for deletion, an error message will be displayed informing you where the global driver assignment is being used. Locked and template generated driver assignments will be grayed out.

A lock icon indicates that this driver assignment is locked by either a program or a template and is not open for editing or deleting.

Global driver assignments can be deleted from the global driver assignment scenario/algorithm screen or from a program driver assignment scenario/algorithm screen.

NOTE	Take care when deleting global driver assignments, this action cannot be undone.

1. Global driver assignments can be deleted by right clicking the driver assignment and selecting **Delete** or highlighting the driver assignment and clicking the delete button in the top bar menu.



2. A confirmation message will be displayed.

3. Click **Yes** to delete or **No** to cancel. If the driver assignment is being used, you will not be able to delete. A message will be displayed informing you where the driver assignment is being used.

Right Click Menu Options

The right click menu for global driver assignments varies if the driver assignment is locked and by what type of lock has been placed on it.

- Unlocked driver assignments have 7 options
- Template Locked driver assignments have 6 options, Program Locked driver assignments have 4 options.

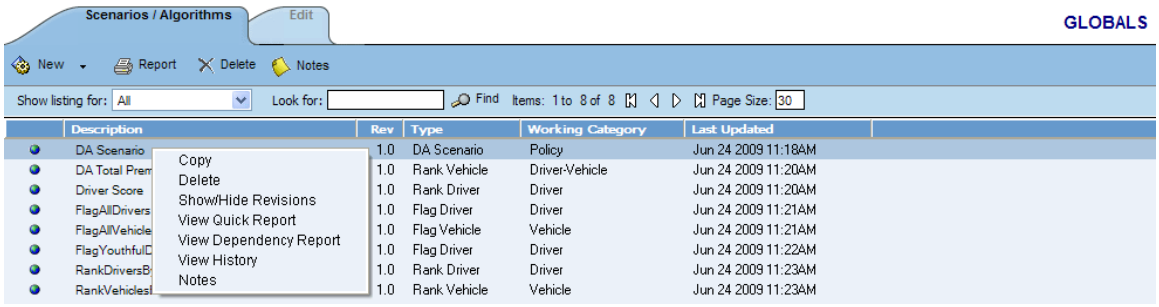


Figure 261 Right Click Menu for Global Driver Assignments

The available right click menu options are:

- **Copy** –Clicking Copy will bring up the copy screen for the driver assignment. Enter in a new name and the driver assignment will be copied and placed in the listing. Global driver assignments, regardless of type, may be copied within the subline. The structure of the driver assignment (including the vehicle usage options/category and steps) is copied. Not available on Program Locked driver assignments.
- **Delete** – Clicking Delete will remove the driver assignment from the list. A warning message will be displayed to confirm the deletion. Not available on any locked driver assignments.
- **Show/Hide Revisions** –Clicking this option will display or hide the revision for this driver assignment. Not available on Program Locked driver assignments.
- **View Quick Report** –Clicking this option will display a report of the driver assignment.

Reports give a detailed view of the driver assignment showing all of the steps and variables used. This screen will contain the program name, revision and working category.

- **View Dependency Report** – A dependency report will give you a tree view of all the associated variables and how they relate to one another for this driver assignment.
- **View History** – Will display a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information.
- **Notes** – Will open up the notes screen where you can add, edit, view, and delete notes for the driver assignment scenario or algorithm.

13

Introduction to Universals

Universals allow you to gather a collection of programs from all lines of business, create specific result group mappings and assign them to execute in an exact sequence. The outcome can be designed to return with as many results as needed. The results of one program can be used as input to another program in a different line of business. Universal inputs can be created that are specific to this area and are not used elsewhere in RateManager. Universals can draw from user generated programs or template generated programs. They are useful when trying to get a rate from multiple programs.

There are two options in Universals:

Workflows

Inputs

Workflows

A workflow is a type of program that allows you to call multiple programs from different lines of business together under one universal program. Results would be inclusive of multiple inputs. For example, if your auto program called for six drivers, the workflow would get results back to for six drivers. Unique data would be passed each time.

You can pull together an auto program, a home program and a life program and run them sequentially to return with one rate. The results from the first program can be fed into the next program and then those results can be fed into the next. This would allow you to create rates that are bundled together.

The workflow screens will allow you to:

Create, edit, copy and delete workflows.

Select the programs to be used in workflows.

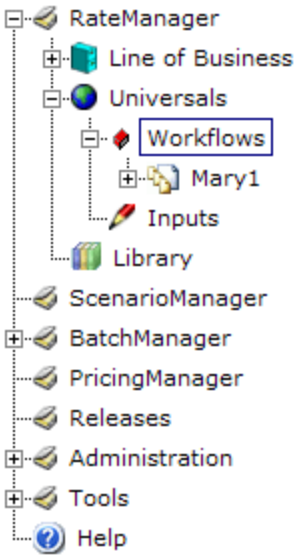
Create, edit, copy and delete the result groups that are used in the workflow.

Package the workflow and all of its dependant programs for deployment.

View workflow inputs XML.

To Navigate to Workflows

1. From the menu tree, select **Universals** and then select **Workflows**.



2. This will open the **Workflows** screen.

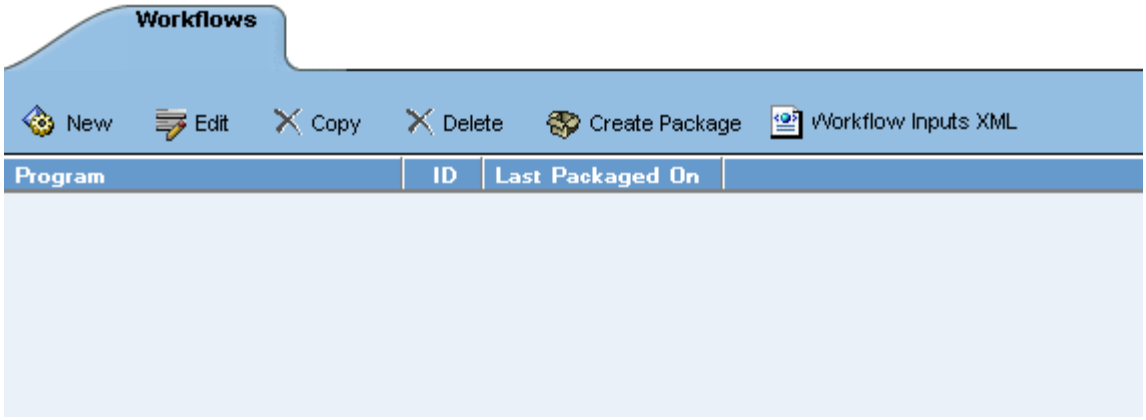


Figure 262 Workflows Screen

Navigation Bar

New: Creates a new workflow.

Edit: Allows for editing of a workflow.

Copy: Copies a workflow.

Delete: Deletes a workflow.

Create Package: Packages the programs for rating and testing. See Introduction to Packaging for more information.

Workflow Inputs XML: Shows a listing of inputs used by the selected workflow.

Workflow Listing

A list of all workflow programs, sorted alphabetically.

Program: Name of the workflow.

ID: The XML ID that is used to call the program. This number is automatically generated and cannot be changed.

Last Packaged On: The date and time the last local package was created for the version.

Creating a Workflow

New workflows can be created at any time.

1. Click the New button. The following popup box will open.

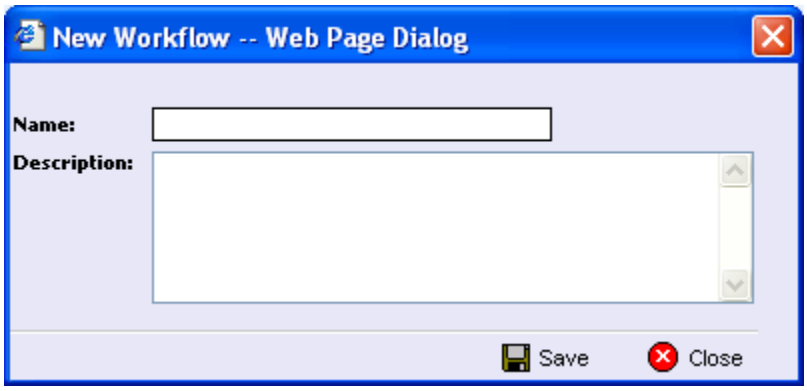


Figure 263 Creating a New Workflow

2. Enter the **workflow Name** and **Description.**
3. Click Save to save your work and close the popup.

Editing a Workflow

Editing is performed on the same screen and any information can be changed at any time.

1. To edit a workflow, select the workflow you want to change and click the Edit button. The Edit Workflow popup will be displayed.
2. Make your changes.
3. Click the Save button to save your work and close the popup.

Deleting a Workflow

Deleting a workflow will delete all associated data. There are no restrictions when deleting a workflow. Make sure this is what you want to do. Deleted workflows cannot be restored.

1. To delete a workflow, select the workflow you want to remove.
2. Click the Delete button. A warning message will be displayed.

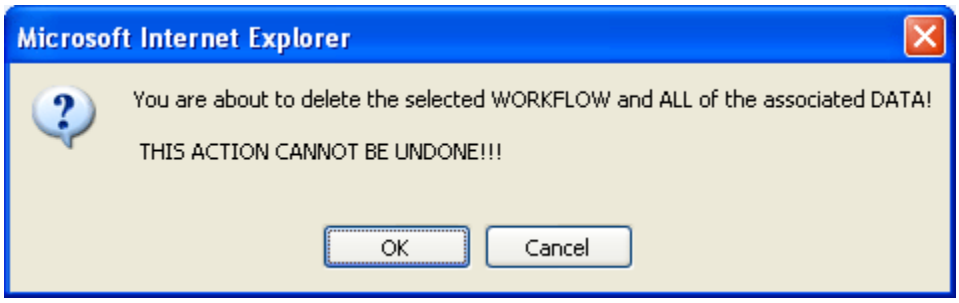


Figure 264 Deleting Workflow Error Message

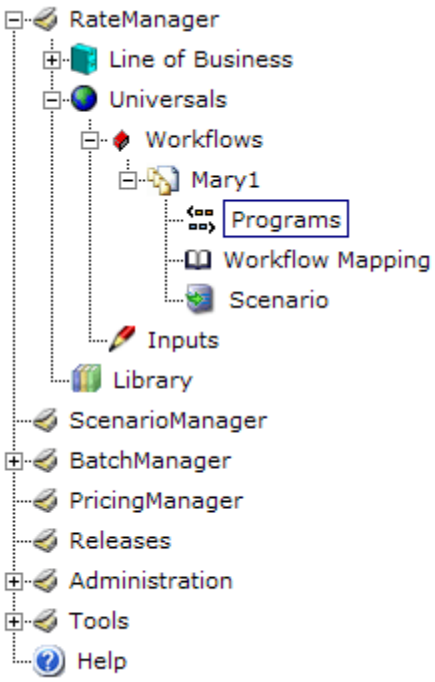
3. Click **OK** to delete or **Cancel** to cancel out of the delete.

Programs

The Program screen allows program versions to be added or removed from Workflows. Program versions can be user created or template generated, however you must select a program version. Entire programs are not allowed. Program versions can only be added or removed. If you need to edit a program version prior to adding it to a workflow, you must return to the subline where it was created. See Editing a Program Version for more information.

Navigating to Programs

1. From the menu tree, select **Universals➢Workflows**. Select the workflow you want to add a program to. Select **Programs**.



2. This will open the **Programs** screen.

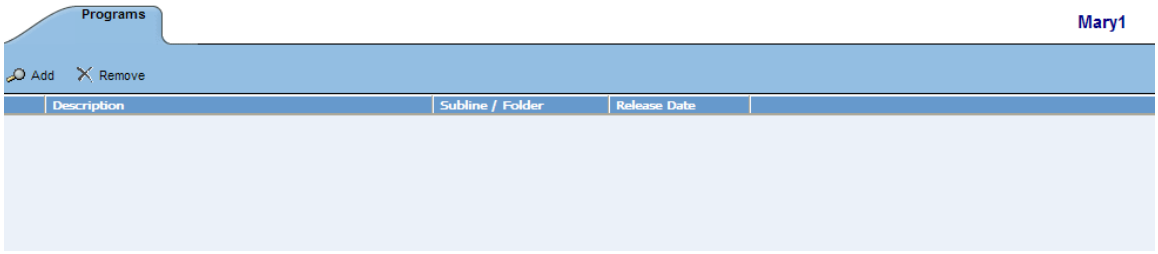


Figure 265 Workflow Programs

Navigation Bar

Add: Adds a program version to the workflow.

Remove: Removes a program version from the workflow.

Program Listing

All programs in this workflow, sorted alphabetically, will be listed.

Description: Name of the program.

Subline/Folder: The subline and folder name of where this program can be found.

Release Date: The last date of the release.

Adding Programs

Program versions can be added at any time. You can add multiple versions from the same program. There is no limit to the number of program versions that can be included.

NOTE	Program versions with callouts can be added to a Universal Workflow. However, be aware that a program cannot make a callout back to the initiating program. This is circular logic and will result in an error.

1. Click Add to bring up the Add/Remove Program popup.

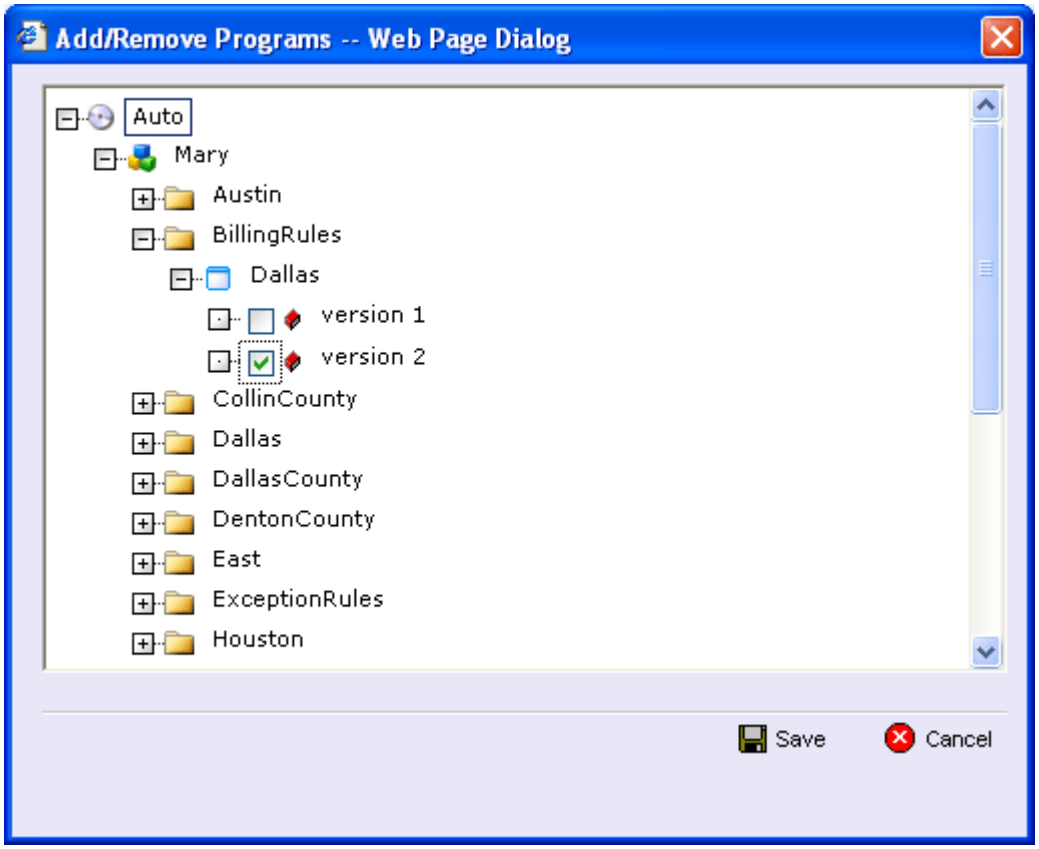


Figure 266 Adding Programs to Workflow

2. Expand the subline that holds the program version you want to add.
3. Expand the folder(s) that has the program version you want.
4. Expand the program that has the version you want to add.
5. Check the appropriate version.
6. Select as many program versions as you need. When you are finished click Save to save your work.

Removing Program/Program Versions

When you remove a program, you can remove either the entire program or just a program version. If you remove the entire program, you are removing all versions.

1. To remove a program, highlight the program.
2. Click the Remove button or right click and select remove.
3. A warning message will be displayed.

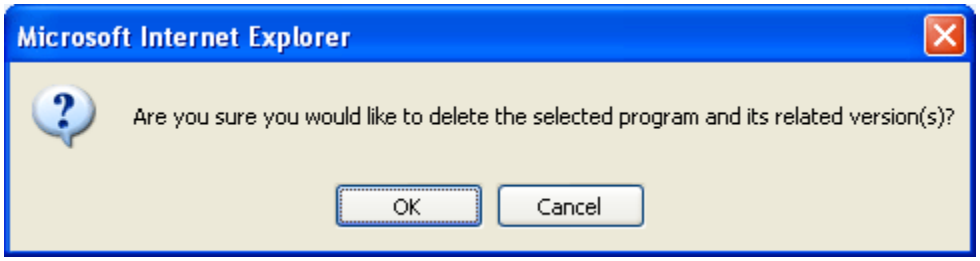


Figure 267 Delete Program/Program Version Warning Message

4. Click **OK** to remove the program or **Cancel** to cancel the action.

Program Version

1. To remove a program version, highlight the program that contains the version you want to remove.

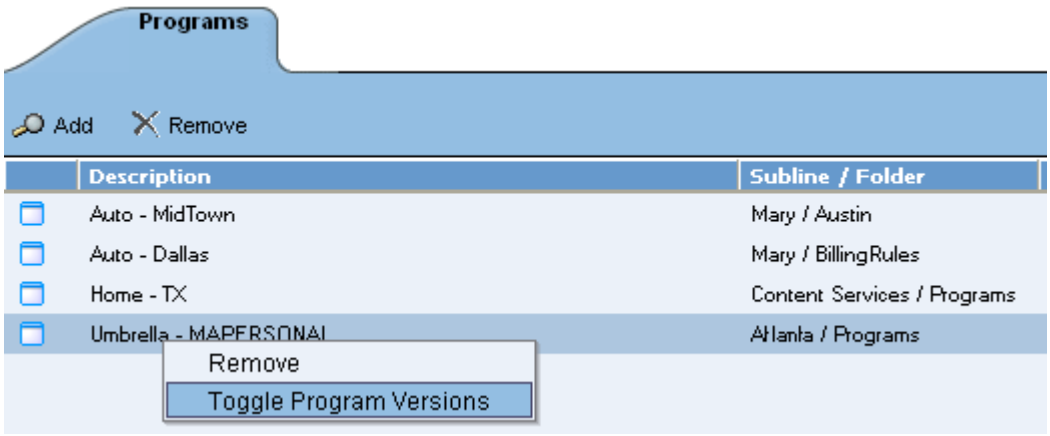


Figure 268 Deleting Program Revisions

2. Right click. Select **Toggle Program Versions**. The available versions will be listed below.
3. Select the version you want to remove and click the Remove button or right click and select remove.

4. A warning message will be displayed. Click **OK** to remove the version. Click **Cancel** to cancel the action.

Right Click Menu

Program versions have two options available on the right click menu.

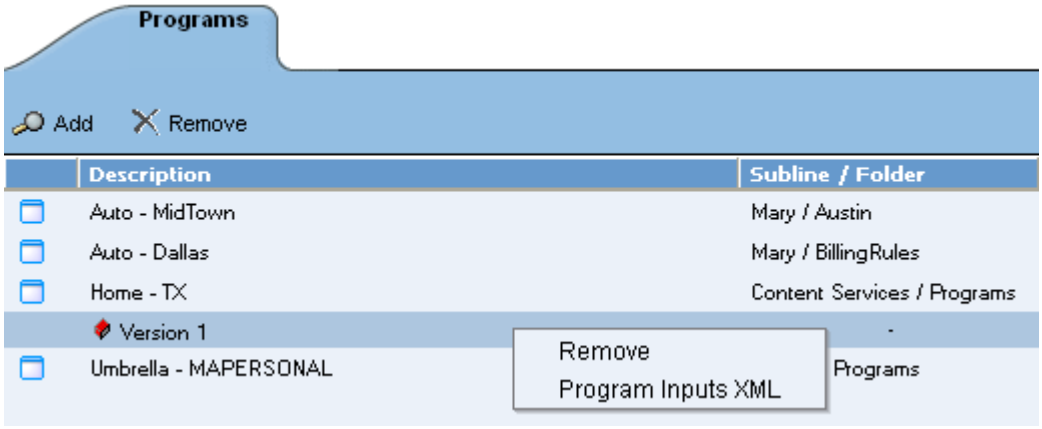


Figure 269 Program Right Click Options

- **Remove:** Removes the version from the program.
- **Program Inputs XML:** Shows a listing of inputs used by the selected program version. See Program Inputs XML.

Workflow Mapping

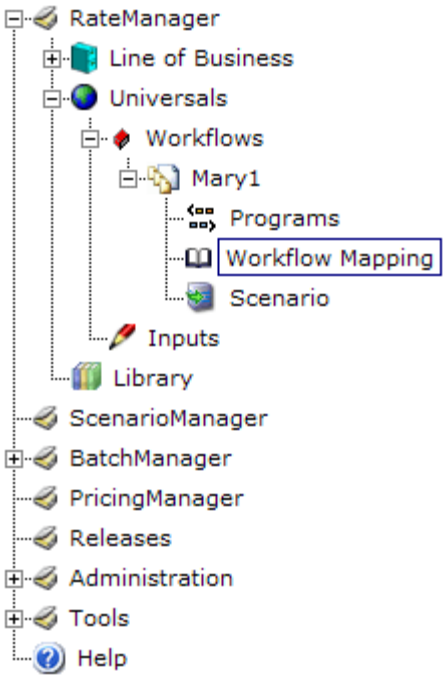
The Workflow Mapping screen allows for the mapping of program results in a workflow. The mappings are workflow specific. The Workflow Mapping screen allows you to:

- Create, edit, copy and delete a result group.
- Map source program results to inputs.

NOTE	Programs must be packaged before you can edit the group.

Navigating to Workflow Mapping

1. From the menu tree, select **Universals➢Workflows**. Select the workflow you want to add a workflow mapping to. Select **Workflow Mapping**.



2. This will open the **Workflow Mapping** screen.

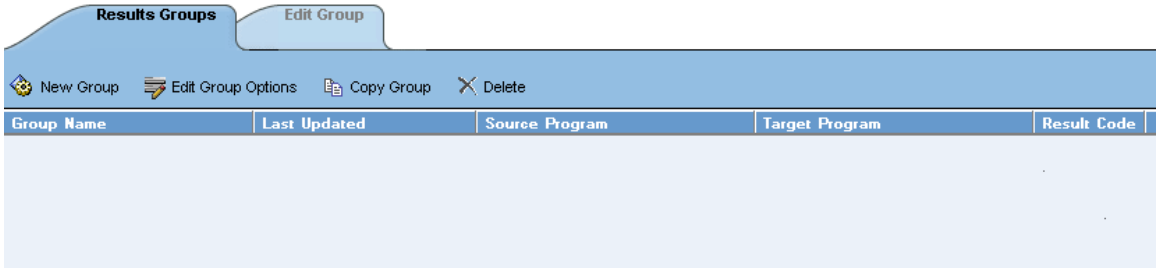


Figure 270 Workflow Mapping

Navigation Bar

New Group: Creates a new group.

Edit Group Options: Allows you to edit a group.

Copy Group: Creates a copy of the selected group.

Delete: Deletes the selected group.

Workflow Mapping Listing

All groups in this workflow, sorted alphabetically, will be listed.

Group Name: Name of the group. This is the only field open for editing.

Last Updated: The date and time of the last update for this group.

Source Program: The program that is the source of the group.

Target Program: The program that is the receiver of the group.

Result Code: The result code of the group.

Adding a New Results Group

Results Groups can be added at any time. There is no limit to the number of groups.
To enter a new results group:

1. Click New Group to bring up the New Workflow Result Group popup.

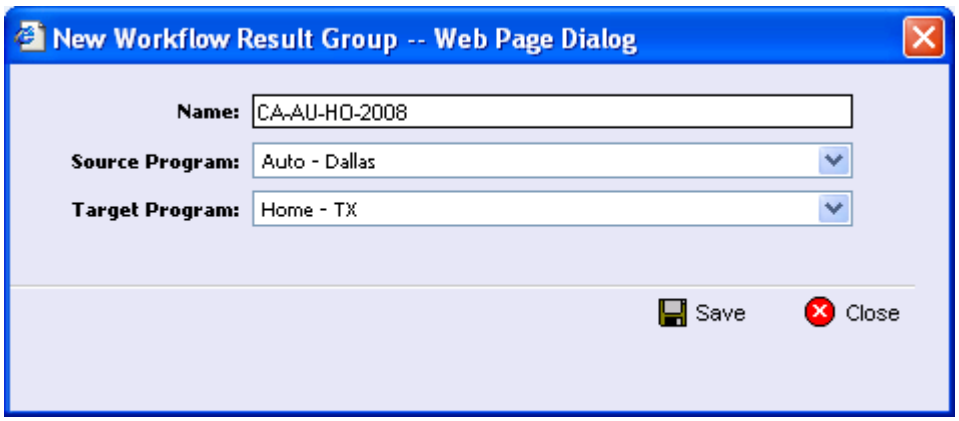


Figure 271 Adding New Result Group to a Workflow

2. Enter in a Name.
3. Select the Source Program from the drop down menu. This is the program that will contribute the inputs.
4. Select the Target Program from the drop down menu. This is the program the will receive the inputs.

NOTE	The Source program and the Target program must be different. If the Source program or the Target program you want are not listed, please return to the Programs area of workflow to select them.

5. When you are finished click Save to save your work.

Editing Result Group Options

Editing is performed on the same screen as entering a new result group. Only the name can be changed. If you need to change the source or target programs, you must delete the result group and re-enter using the correct information.

1. To edit a result group, select the group you want to change and click the Edit Group Options button. The Edit Workflow Result Group popup will be displayed. You also can right click and select Edit Group Options from the menu.
2. Make your changes.
3. Click the Save button to save your work and close the popup.

Editing Result Groups in Workflow Mapping

To edit the mappings of a result group, select the group and click the Edit Group tab.

NOTE	If the screen is blank when you go to edit, it is because the programs have not been packaged. Programs must be packaged before you can edit the group.

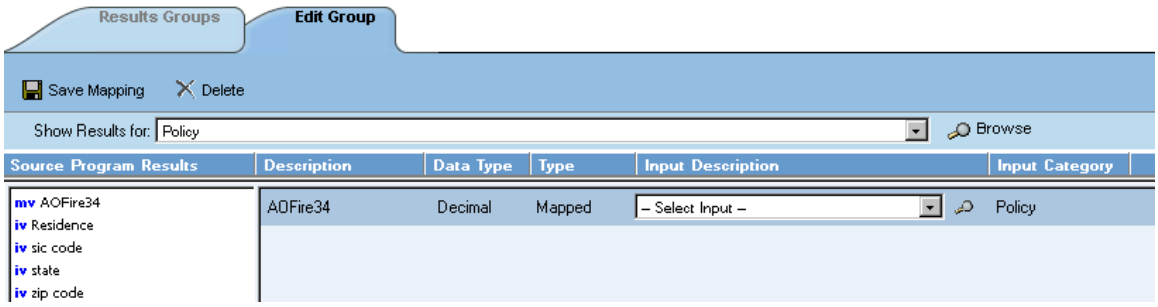


Figure 272 Editing Result Groups in Workflow Mapping

Navigation Bar

Result Groups Tab: Used to go back to the Result Groups Listing screen.

Save Mapping: Saves the mapping for the result group.

Delete: Removes the selected criteria from the mapping.

Results Listing

Show Results For: Allows you to filter the type of input variable shown.

Group Information

Source Program Results: Results for the source program will be listed here. Results will vary according the Show Results for selection.

Description: A description of the source program results.

Data Type: Type of data associated with the source program result. Options are:

- **Decimal**
- **String**
- **Integer**
- **Date**

Type: The type of result. Types include input, result calculated and mapped.

Input Description: Select the input from the drop down menu or click the Browse button to select the input you want.

Input Category: Displays the category.

Editing a Group

1. Select the category from the drop down menu or you can browse for the category you want by clicking the Browse button. This will bring up the Browse Category popup.

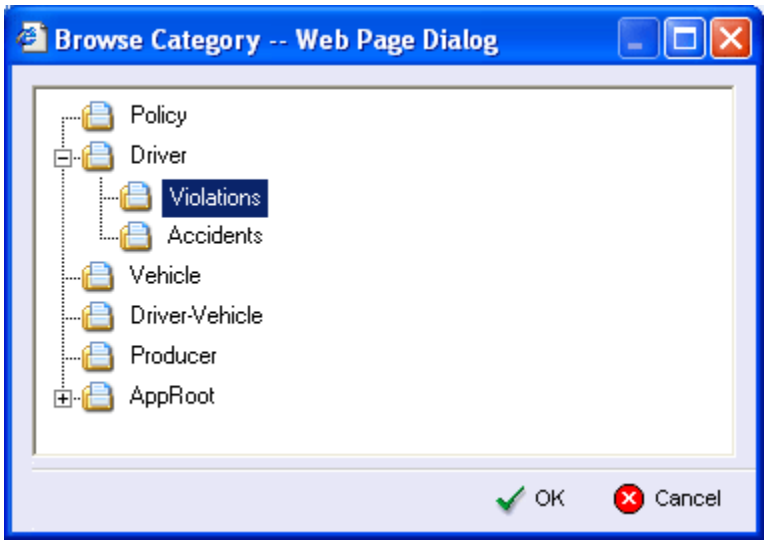


Figure 273 Browse Category

From here you can navigate to the Category you want. Once you have selected the category, click **OK**. The category will auto fill in the show results for section.

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

2. After you have selected a category, the Source program Results will be populated. Click on the result you want to map. The details will be displayed in the description area to the right.

3. Select the Input description from the drop down menu or click the Browse button to select the information you need.

4. You can select as many or as few inputs as you want.

5. Before changing categories, click the Save Mapping button to save your work.

6. After you have finished entering in the inputs, click Save Mapping and exit the screen.

Copying a Result Group

Copies can be made of any result group at any time. Use this feature when you want to keep the same target and source programs but require different result mappings.

1. To copy a workflow, select the result group you want to copy and click the Copy Group button. The Copy Workflow Result Group Box will be displayed.

2. Enter the new name.

3. Click the Copy button to save your work and close the popup.

Deleting a Result Group

A result group can be deleted at any time. When you delete a result group, you are deleting all associated mappings. There are no restrictions when deleting a result group. Be sure when you delete, this is a permanent removal.

1. To delete a result group, select the group you want to remove.

2. Click the Delete button. A warning message will be displayed.

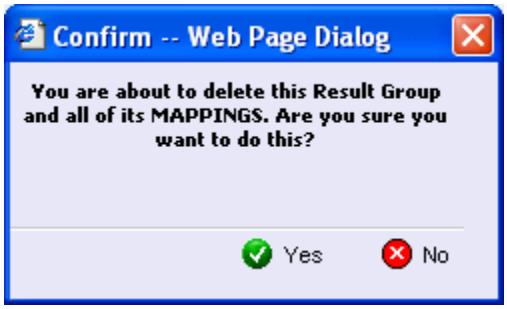


Figure 274 Deleting a Result Group Warning Message

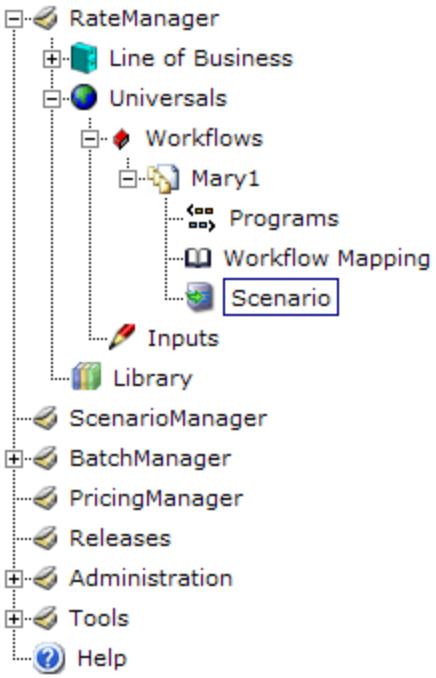
3. Click **Yes** to delete or **No** to cancel out of the delete.

Scenario

The Scenario screen allows users to specify and maintain the workflow steps and rules.

Navigating to Scenario

1. From the menu tree, select **Universals➢Workflows**. Select the workflow you want to add a scenario to. Select **Scenario**.



1. This will open the **Scenarios** screen.

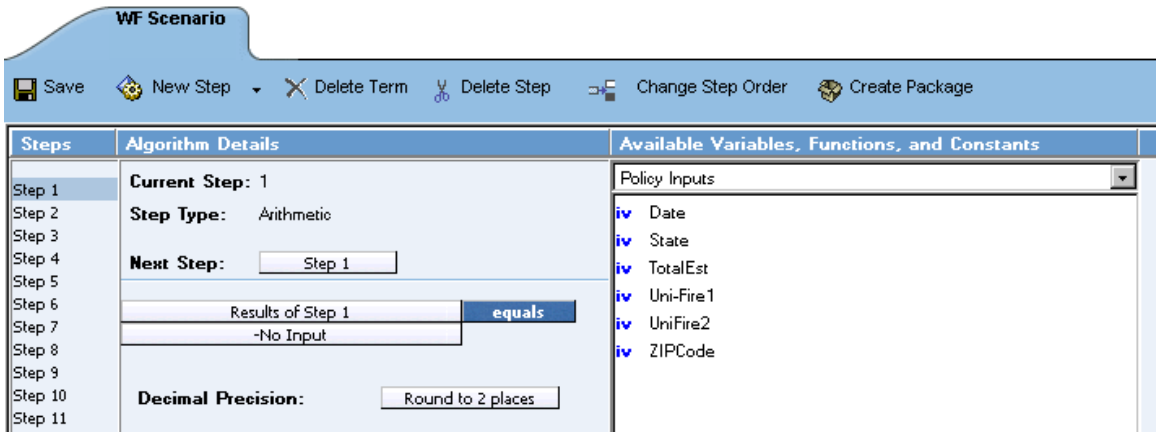


Figure 275 Workflow Scenario

Navigation Bar

Save: Saves the current scenario.

New Step: Creates a new step in the algorithm. For more information, see Step Types.

Delete Term: Deletes the currently selected term from a step in an algorithm.

Delete Step: Deletes the currently selected step. You cannot delete the last step in an algorithm.

Change Step Order: Allows users to change the order of the steps without using the drop and drag feature.

Create Package: Packages the selected program version for rating and testing. See Introduction to Packaging for more information.

Scenario Details

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Algorithm Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set via a drop down listing by clicking on the text box next to **Decimal Precision**. You can select a decimal precision from 0 to 5 digits.

Available Variables, Functions and Constants Selection Box: Drop down selection of available inputs, variables, constants and functions sorted by category.

Editing a Scenario

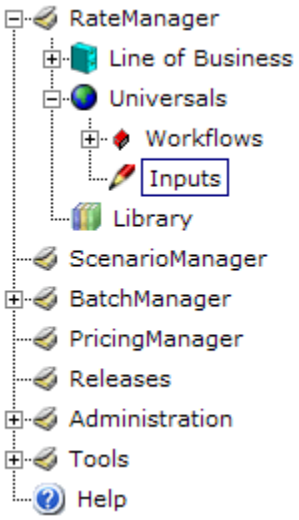
To edit a scenario, click on the step type. The algorithm details will be displayed. See Editing an Algorithm for more information.

Inputs

Universal Inputs are specific to Universals. They will not be found anywhere else in the system. Universal Inputs are entered like any other input variables in the system. See Introduction to Variables for more information.

To Navigate to Inputs

1. From the menu tree, select **Universals** and then select **Inputs**.



2. This will open the **Inputs** screen.

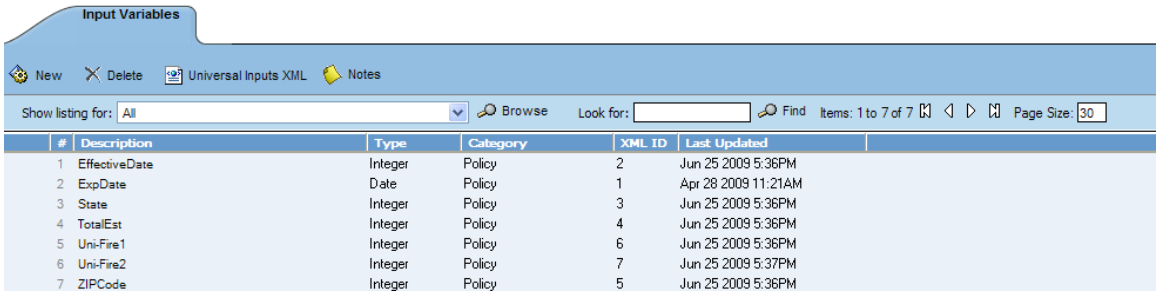


Figure 276 Universal Inputs

Navigation Bar

New: Begins the process of creating a new input.

Delete: Deletes the selected input.

Universal Inputs XML: View XML for the Universal Inputs.

Notes: Allows you to enter, edit and view notes to the input.

Show Listing For: Allows you to filter the type of input variable shown. You also can browse for a category by clicking the Browse button. This will bring up the Browse Category popup.

Look For: Allows you to narrow the list of variables. To do this, type in a part or the entire name you are looking for and click Find. To display all variables again, clear this box and select Find.

Page Size: Allows the user to customize the number of variables displayed per page and move back and forth between pages. Also displays the total number of variables that match the criteria in both the Show Listing For box and the Look For box.

Column Sorting: You can sort inputs by individual column headers. The default view is

alphabetically (A to Z) by Description. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Input Variable Listing

#: The order in which the result will be displayed.

Description: The name of the input variable.

Type: The type of input variable, i.e. date, decimal, integer or string.

Category: The category of the input variable.

XML ID: The XML ID that is used to call the program.

Last Updated: The date and time of the last update.

Creating a New Universal Variable Input

New universal variables can be added at any time. There is no limit to the number of variables you can enter. All universal inputs will be under the policy category.

1. Navigate to **Universals**.
2. Click once on the New button. The following popup box will open.

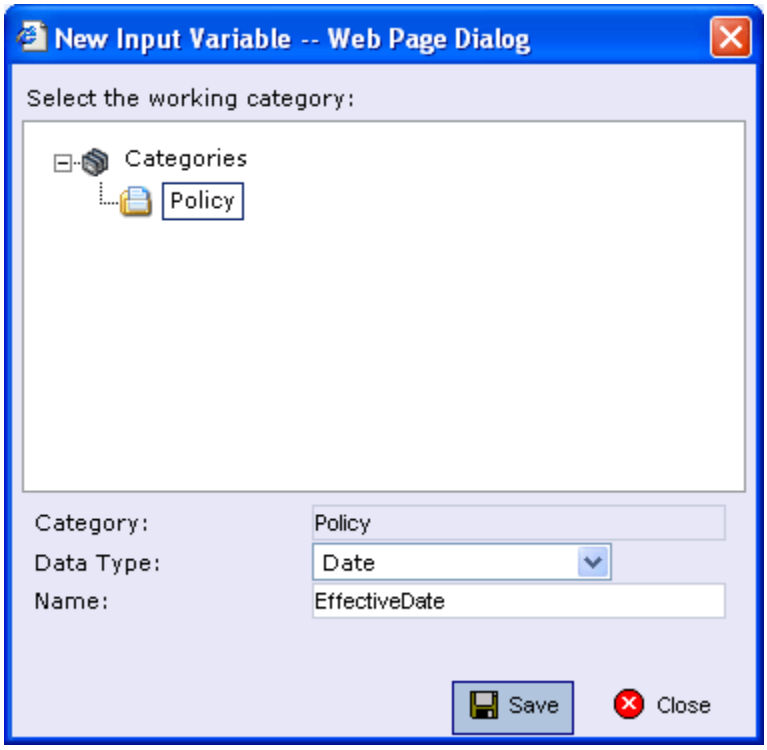


Figure 277 Creating a New Universal Input

3. Select the **Data Type** from the drop down menu.
4. Enter in an Input **Name**.
5. Click Save to save your work and close the popup.

Editing a Universal Input

Editing is performed on the same screen as entering a new universal input.

1. To edit an input, double-click the input you want to change. The Edit Input Variable popup will be displayed. You also can right click and select **Edit** from the menu.
2. Make your changes.
3. Click the Save button to save your work and close the popup.

Deleting an Input Variable

A Universal Input Variable can be deleted at any time. There are no restrictions when deleting an input variable. Be sure when you delete, this is a permanent removal.

1. To delete an input variable, select the one you want to remove.
2. Click the Delete button or you can right click and select Delete from the menu. A warning message will be displayed.

Figure 278 Deleting a Universal Input Variable Warning Message

3. Click **Yes** to delete or **No** to cancel out of the delete.

Universal Inputs XML

Clicking the **Universal Inputs XML** button will bring up a popup that shows a listing of inputs being used.

To View Universal Inputs XML

1. Navigate to the **Universals.** Select Inputs. The main Universal Inputs screen will be displayed.
2. Click the input that you want to view the XML for.

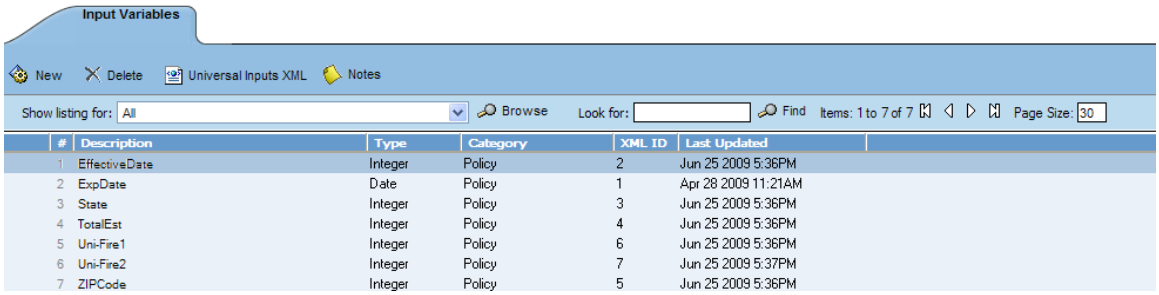


Figure 279 Universal Inputs XML

3. Click the Universal Inputs XML button in the menu bar.
4. A popup box will open that allows you to view, copy or print the XML for this input.

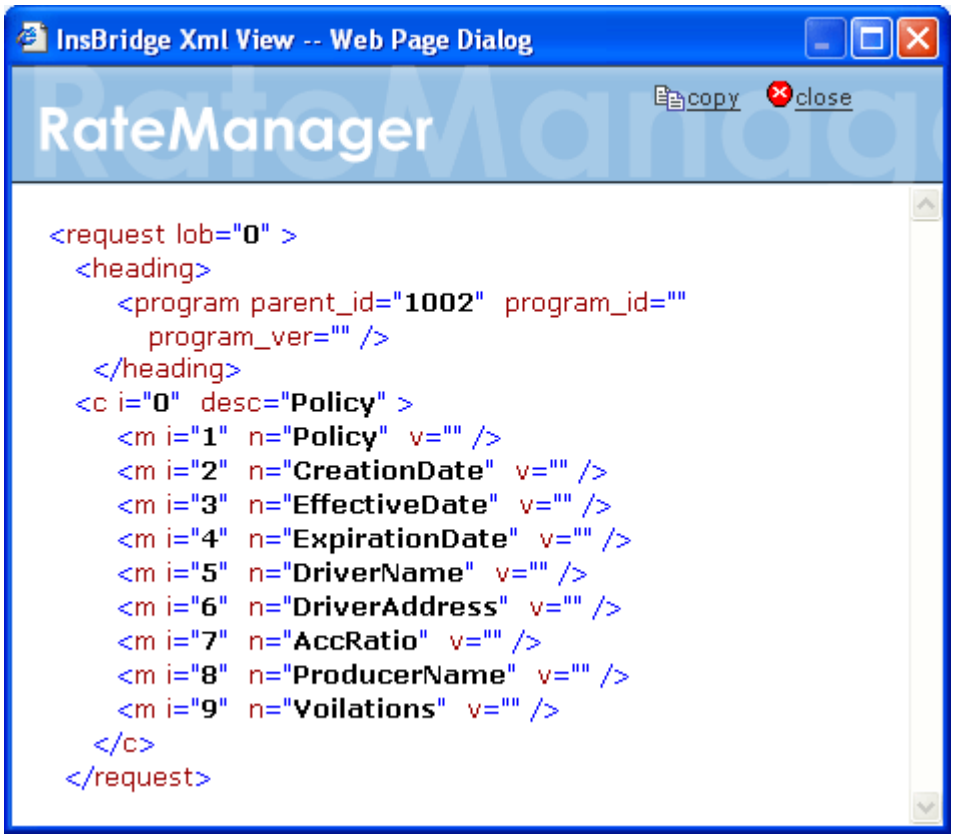


Figure 280 Universal Inputs XML

4. Click the close button to close the popup when you are finished.

Right Click Menu

Universal Inputs has a right click menu that has features not found on the menu bar.

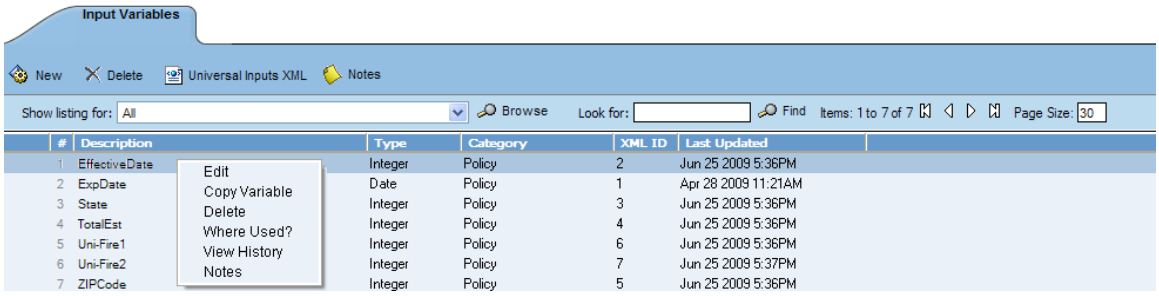


Figure 281 Right Click Menu Options for Universal Input Variables

- **Edit** – Allows you to edit the input variable.
- **Copy Variable** – Allows you to make a copy of the selected input variable.
- **Delete** – Deletes the selected input variable.
- **Where Used?** – Clicking where used will display an information screen that details where the variable is being used. Available to all locked and unlocked variables. For more information see Where Used.
- **View History** – Will display a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. For more information see View History.
- **Notes** – Will open up the notes screen where you can add, edit, view, and delete notes for the input.

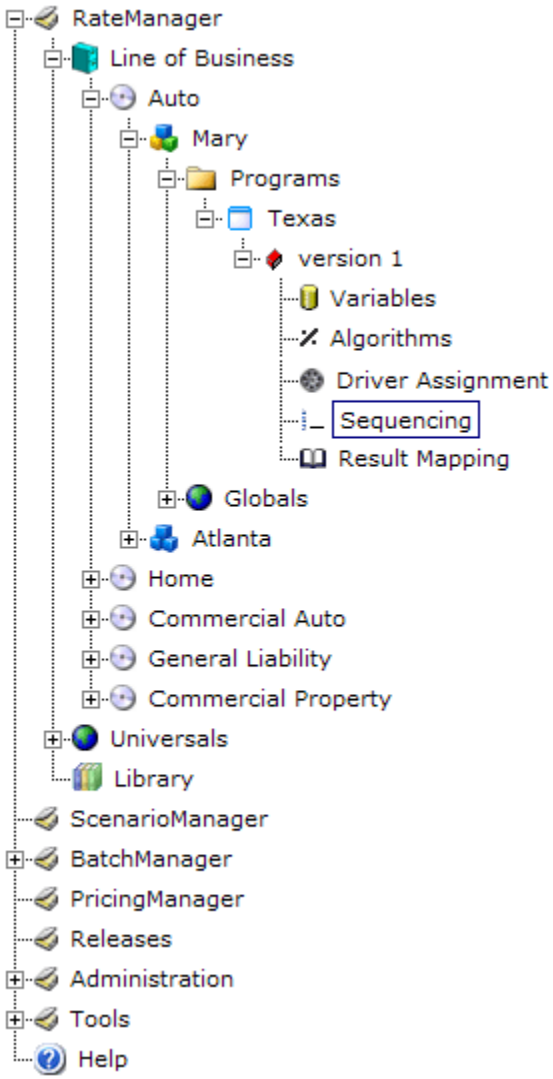
14

Introduction to Sequencing

Sequencing allows you to activate and order algorithms and underwriting rules. After creating your algorithms, you need to set the order in which they should run. For example, if you had a Total Premium algorithm that was calculated from the sum of BI Premium, PD Premium, MP Premium, Comp Premium and Coll Premium, you would want the Total Premium algorithm to run after all the other premiums had been calculated.

Navigating to Sequencing

1. From the menu tree, select the subline, folder, program and version where you want to add a sequence and then click **Sequencing**.



2. This will open the **Program Sequencing** screen.

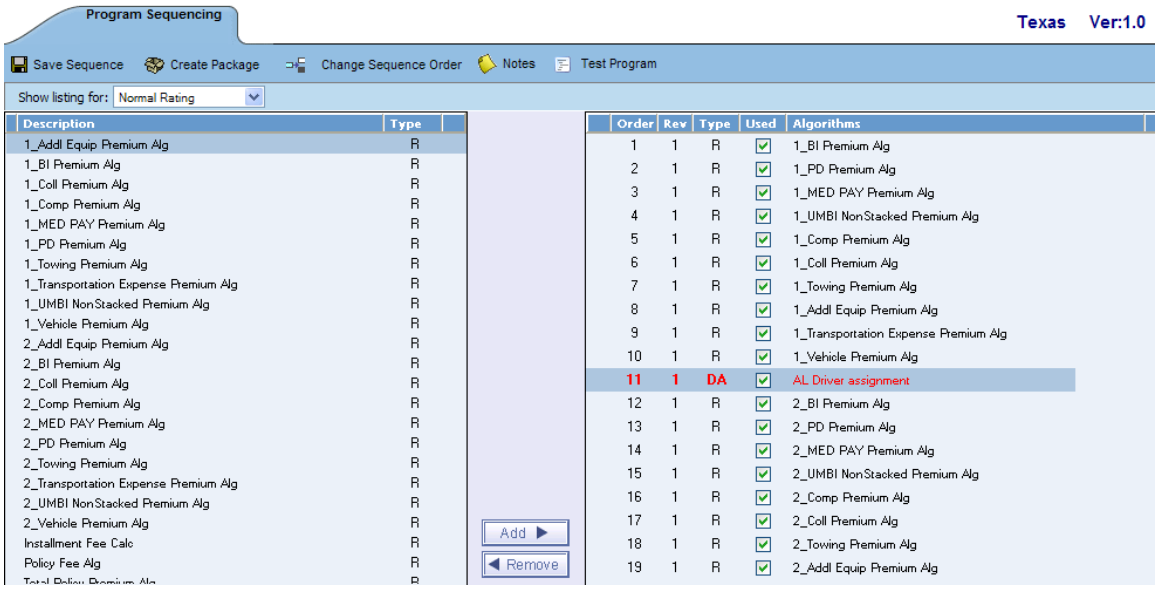


Figure 282 Program Sequencing Screen

Navigation Bar

Save Sequence: Saves the Sequence. If you make a mistake while changing the sequence, you can select **Sequencing** from the menu tree in the left navigation pane to reload the last saved sequence.

NOTE	If you have made changes to your Sequence, but haven't saved, RateManager will prompt you to save before allowing you to navigate to another page.

Create Package: Packages the program for rating and testing. See Introduction to Packaging for more information.

Change Sequence Order: Allows you to change the order of the sequences without using the drop and drag feature.

Notes: Allows you to enter, edit and view notes to the sequence.

Test Program: Opens the Test Case Editor, which allows you to test and debug a program within RateManager. See Introduction to the Test Case Editor for more information.

Show Listing For: Allows you to filter the list of available algorithms to show one of the following:

- All Algorithms
- Only Normal Rating Algorithms
- Only Underwriting Algorithms
- Only Driver Assignment Scenarios - on the Auto LOB only

Column Sorting: You can sort algorithms by order number or algorithm column headers. The default view is numeric (lowest to highest) by Order number. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Algorithm / Driver Assignment Listings

The program sequencing screen is divided into two areas with two buttons in between.

- **Available Algorithms/Driver Assignments –** The default listing on the left side of the screen shows alphabetically all rating algorithms that have been created for this program version. If you want to view the underwriting rules or driver assignments, select your choice from the Show Listing For selection box.
- **Selected Algorithms/Driver Assignments –** The listing on the right side of the screen shows all algorithms that have been added to the sequencing and the order in which they will be executed.
- **Add –** Adds the selected algorithm or driver assignment from the list of available algorithms and driver assignments to the sequence. If the algorithm or driver assignment is already in the sequence, an error message will be displayed. Each algorithm and driver assignment can be added once.
- **Remove –** Removes the selected algorithm or driver assignment from the sequence.

NOTE	You cannot remove the last algorithm from a sequence. All sequences must have at least one algorithm.

Creating a Sequence

You can add as many algorithms and driver assignments as you need. The first algorithm you add to the selected column will be the first one executed, the second one added will be the second one executed and so on. You can change the order after you have made a sequence.

All algorithms and driver assignments listed are the active revision. The revision will be displayed on the left side of the screen in the **Rev** column. If the revision you need is not brought over, you must return to the program and change the active revision. The revision will be updated in the sequence.

All algorithms and driver assignments are active when brought into the sequence column. A green checkmark will be in the **Used** column. If you want to leave an algorithm in the sequencing, but do not want it executed, then remove the check next to the algorithm name.

Once a sequence has been created, it cannot be deleted, only changed.

1. To add an algorithm or driver assignment to the sequencing, you can either highlight it and click

or double-click the algorithm or driver assignment.
2. Once the algorithms and driver assignments are activated and sequenced, click the **Save Sequence** button to save your work.

NOTE	If you have created an algorithm or driver assignment and it does not appear in the list, be sure the Show Listing For selection box is set to filter correctly.

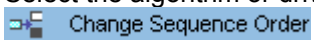
NOTE	For an auto program, any algorithm that is sequenced before the red colored driver assignment scenario will run before drivers are assigned to vehicles.

Changing Sequence Order

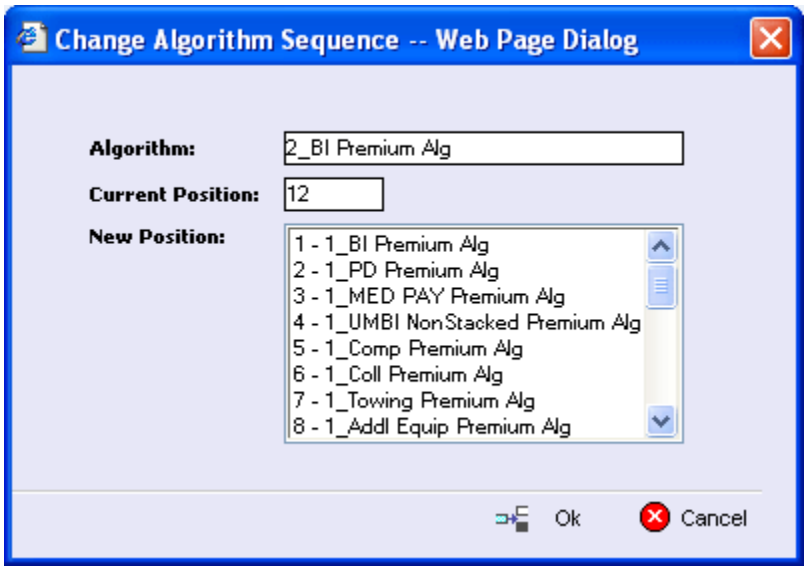
Any algorithm can be moved in the sequence order. Sequence order can be changed at any time. There are two ways to change the execution sequence: drop and drag or the Change Sequence Order button.

To use the **drop and drag** method, highlight the algorithm or driver assignment you want to move, then drag it to the new location and drop it. If you want to move an algorithm farther up than you can see or farther down than you can see, you can use the keyboard's arrow keys or you mouse wheel (if so equipped) to move the scroll bar up or down, while dragging the algorithm

To use the **Change Sequence Order** button:

1. Select the algorithm or driver assignment you want to move and click the 

button. A separate screen will be displayed.



2. The current position will be displayed at the top of the screen. Select where you want the algorithm or driver assignment to be placed.

3. Click **OK**. You will be returned to the program sequencing screen. Your algorithm or driver assignment should be placed where you chose.

WARNING	**For an auto program, algorithms that use both driver and vehicle information must be sequenced to run after driver assignment.**

15

Introduction to Result Mapping

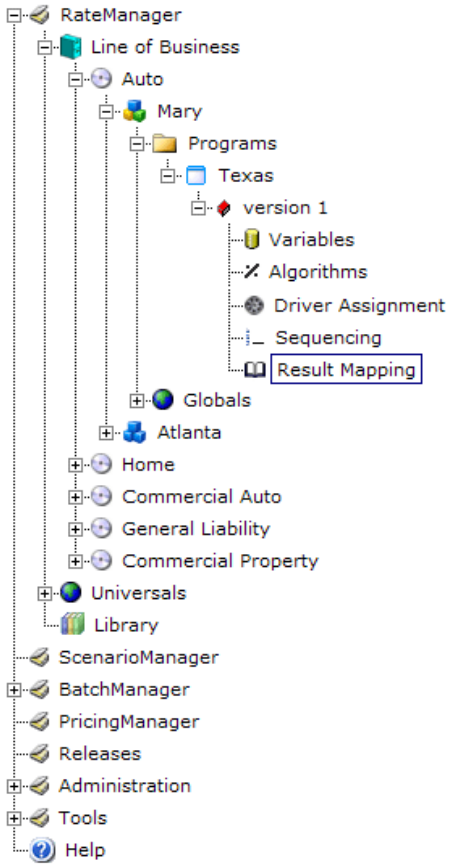
The result mapping function allows you to select the results that you want displayed in the output file. Whether it is a result, input, mapped or calculated variable, global or local, there is no limit to the type or number of results you can set. Results are mapped to the rating output file based on how you want to view the data. This might include premiums, rating factors, driver ages, etc.

Result Group Listing Screen

The Result Group Listing screen shows all the result groups that have been created for a particular program version.

Navigating to the Result Group Listing

1. From the menu tree, select the subline, folder, program and version where you want to see the result groups and then click **Result Mapping**.



2. This will open the **Result Group Listing** screen.

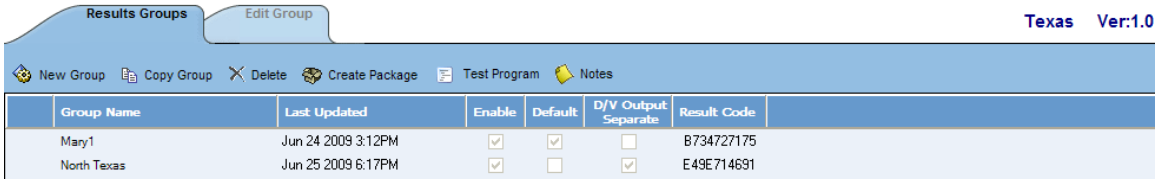


Figure 283 Results Group Listing

Navigation Bar

Edit Group Tab: Opens the Edit Group screen for the currently selected result group.

New Group: Starts the process of creating a new result group.

Copy Group: Creates a copy of the selected result group.

Delete: Removes the selected result group from the result mapping.

Create Package: Packages the program for rating and testing. See Introduction to Packaging for more information.

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to the Test Case Editor for more information.

Notes: Allows you to enter, edit and view notes to the result mapping.

Result Group Listing

Shows a listing of the result groups created.

Group Name: Name of the result group.

Last Updated: Time stamp of when the result group was last saved or the options were changed.

Enable: A check indicates that the result group will be available to use when rating.

Default: A check indicates that the result group will be the default group used when rating, unless overridden in the input XML.

D/V Output Separate (Auto LOB only): A check indicates that output for the drivers and vehicles will be listed separately in the result XML. For more information, see the driver assignment topic Separating Driver and Vehicle Output (Auto LOB Only).

Result Code: An automatically generated code that cannot be changed but can be used to override the default result group. For more information, see the SoftRater section, SoftRater Switches.

Creating a New Result Group

RateManager supports an unlimited number of result groups for any program version. Every program must have at least one result group. Each result group contains a specific set of elements that will be output when that group is used. The Results Group screen allows you to create, edit, copy and delete a result group.

NOTE	Programs must be packaged before you can edit the group.

To Create a New Result Group

1. Navigate to the Result Group Listing screen for the program and version where you want to create a result group.

2. Select New Group from the menu bar. This will open the **New Result Group** window.

Figure 284 Entering a New Result Group

NOTE	The Separate Driver and Vehicle Output option will only be available on Result Mappings in the Auto LOB.

3. Enter a name for the new result group. If this is the first result group, the **Enable** and **Default** options will get checked automatically when saved. If this is an additional result group, the **Enable** option will get checked automatically when saved. To set the new group as the default, select the **Default** option.

4. Click Save when you have finished to save the new result group and update the result group listing.

Editing a Result Group

Edit a result group when you want to change the output results or to change result IDs. The first time you enter the edit screen, it will be blank. You will need to add variables based on the categories used.

To Edit a Result Group

1. Navigate to the Result Group Listing for the program and version you want to edit.
2. Select the result group you want to edit and either double-click it or click the **Edit Group** tab.
3. This will open the **Edit Group** screen for the result group.

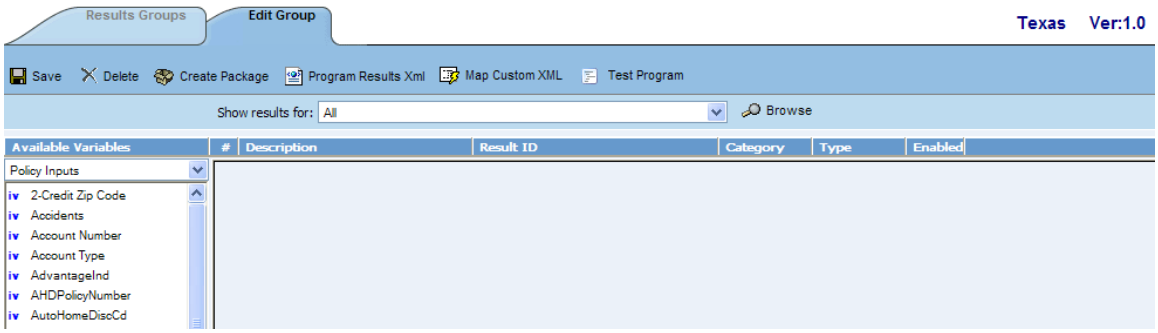


Figure 285 Editing a Result Group

Navigation Bar

Result Group Tab: Takes you back to the Result Group Listing.

Save: Saves the result group.

Delete: Removes the selected result from the result group.

Create Package: Packages the program for rating and testing. See Introduction to Packaging for more information.

Program Results Xml: Opens a window that displays the Program Results XML.

Map Custom XML: Opens a window that allows you to create a mapping that will transform the output XML. See Introduction to Input and Output Mapping for more information.

Test Program: Opens the Test Case Editor, which allows the user to test and debug a program within RateManager. See Introduction to the Introduction to Test Case Editor for more information.

Show Results For: Allows you to filter the category shown. You also can browse for a

category by clicking the button. This will bring up the Browse Category popup.

All is the default category. This will display all selected variables and the corresponding Result ID.

Available Variables

Drop down selection of available inputs, variables and results sorted by category. To add an item to the result group, find it in the listing and double-click it.

Selected Results

A listing of inputs, variables and results that have been selected. The listing shows the results in the order they will be outputted.

#: The order in which the result will be displayed.

Description: The name of the variable or input.

Result ID: The associated ID that is used for XML mapping. The ID can be up to 256 characters.

Category: The working category of the variable or input.

Type: The type of variable or input. i.e. mapped, calculated, input or result.

Enabled: A check indicates that the result will be mapped. All results are active when brought into the selected column. A green checkmark will be in the **Enabled** column. If you want to leave a result in the listing, but do not want it executed, then remove the check next to the result.

Adding Variables to a Result Mapping

On the **Edit Result Group** screen you can choose which inputs, variables, and result variables will be output in the rate result.

1. Select the category you want from the **Show result for** drop down menu.

2. Select the same category from the **Available Variables** drop down list on the left hand side of the screen. The categories must be the same. For example, if you select the Policy category up top, you will now be able to add the Policy inputs, variables and results.

3. Double-click the input, variable, or result you want to add. It will be added to the listing. You can add as many inputs, variables and results as you need. The first item you add to the selected column will be the first one listed, the second one added will be the second one listed and so on. You can change the order after you are done.

4. Once an item is added as a result, you may enter a custom **Result ID** in the text box. **Result IDs** do not affect the rating process; they only exist to ease integration efforts with a company's existing back end systems.

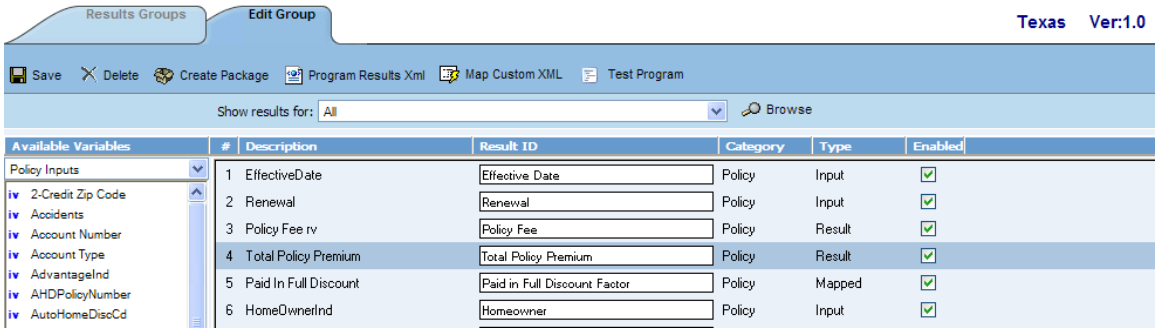


Figure 286 Adding Variables to Result Mapping

NOTE	If you receive a message saying that a specific result cannot be added because the wrong category is selected. This means that the working category of the result you are trying to add differs from the filtered working category of the result mapping. Click **Yes** to automatically switch to the appropriate category and add the item to the result mapping.

Editing Result Group Options

Editing a result group allows you to change the name of a result group, as well as, whether it is enabled and/or the default. For an auto line of business result group, you also can set the separate driver vehicle option.

To Edit Result Group Options

1. Navigate to the Result Group Listing screen for the program and version that contains the result group whose options you want to edit.

2. Select the group whose options you want to edit and then right click. Select **Edit Result Group** from the menu. This will open the Edit Group popup window.

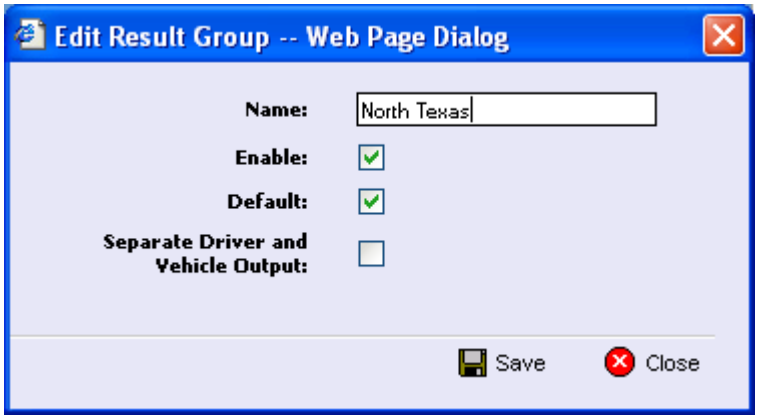


Figure 287 Edit Result Group

3. Type in a new name for the result group. To enable the result group, select the **Enable** option. To set the group as the default, select the **Default** option. Click Save when you have finished to save the new result group and update the result group listing.

4. For an Auto program, you also will have the option to **Separate Driver and Vehicle Output**. For information on this option, see the driver assignment topic Separating Driver and Vehicle Output.

Changing Result Output

To change the result order, use the **Show Results For** box to select a category. Highlight the item you want to move. Hold down the mouse button to drag and drop the results. You will know the result is ready to move when you see a blue shadow box containing the result information displayed.

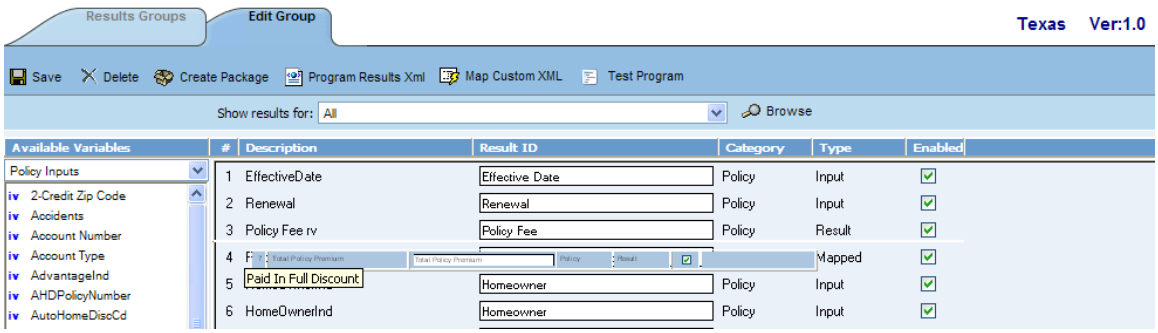


Figure 288 Moving Result Mapping

Deleting a Result Group

Result groups can be deleted at any time. It is possible to delete all result groups. However, in order to package a program, you must have at least one result group.

To Delete a Result Group

1. Navigate to the Result Group Listing screen for the program and version that contains the result group you want to delete.

2. Select the group and then click Delete. A warning message will be displayed.

3. Select yes to remove the result group. Select no to return to the Result Group Listing without deleting a result group.

Right Click Menu for Result Groups

Result Groups has a right click menu that has features not found on the menu bar.

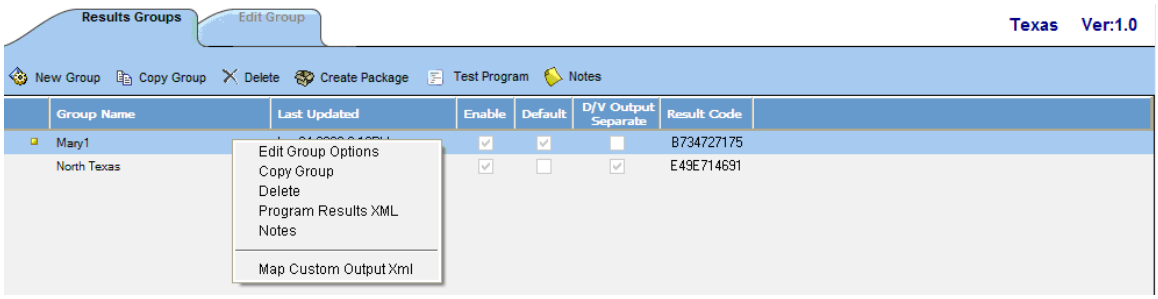


Figure 289 Right Click Menu Options for Result Groups

- **Edit Group Options** – Allows you to change information about the selected result group. This includes the name, default option, enabled option and, if an auto program, the driver vehicle separate option.
- **Copy Group** – Allows you to make a copy of the selected result group.
- **Delete** – Deletes the selected result group.
- **Program Result XML** – Opens a window that displays the Program Results XML.
- **Notes** – Will open up the notes screen where you can add, edit, view, and delete notes for the result group.
- **Map Custom Output Xml** – Opens a window that allows you to create a mapping that will transform the output XML. See Introduction to Input and Output Mapping for more information.

16

Introduction to Input and Output Mapping

SoftRater requires that input files be in a specific XML format, known as Insbridge.XML. Likewise, when SoftRater finishes rating, it returns the results in Insbridge.XML format as well. An example of an input file in the Insbridge.XML format is shown below:

```
<rate lob=”5”>
    <heading>
        <program parent_id=”123” program_id=”3” program_ver=”1”/>
    </heading>
    <c i=”0” desc=”Policy”>
        <m i=”2” n=”EffectiveDate” v=”04/11/2005”/>
        <m i=”4” n=”TerritoryCode” v=”1”/>
    </c>
    <c i=”1” desc=”Dwelling”>
        <m i=”6” n=”PerilDeductible” v=”250”/>
        <m i=”11” n=”FireAlarmInd” v=”1”/>
        <m i=”12” n=”BurgularAlarmInd” v=”1”/>
        <m i=”13” n=”OccupancyCode” v=”1”/>
        <m i=”19” n=”DwellingLimit” v=”150000”/>
        <c i=”2” desc=”Coverage”>
            <m i=”5” n=”Coverage”>
            <m i=”16” n=”CoverageCode” v=”CovA”/>
            <m i=”17” n=”CovLimit” v=”150000”/>
        </c>
        <c i=”2” desc=”Coverage”>
            <m i=”15” n=”CovInput” v=”3”/>
            <m i=”16” n=”CoverageCode” v=”CovC”/>
            <m i=”17” n=”CovLimit” v=”75000”/>
        </c>
    </c>
</rate>
```

If your organization has an existing XML format you want to use (such as ACORD® XML), then you can use RateManager to map the inputs from your organization's XML format to the Insbridge.XML format. In addition, you can also map the outputs from the Insbridge.XML format to your organization's XML format. This allows you to rate using an input file in your organization’s XML format and receive a result file in your organization's XML format. The process looks like this:

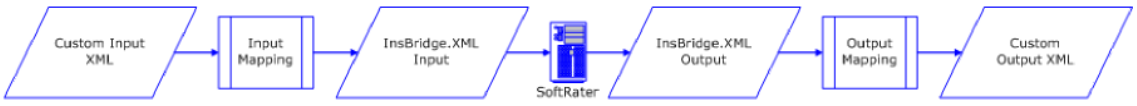


Figure 290 Using an existing XML Format

Alternatively, you can create your own style sheets and have SoftRater convert the input file before rating and convert the output file after rating.

Preparation for Mapping an Input File

Before you begin the process of mapping, you will need a sample of the custom XML file that will be used during rating. Make sure the file contains all the inputs you want to map. An example of a custom XML file for a fire program is shown below:

```
<Fire>
    <Policy>
        <EffectiveDate>03/05/2008</EffectiveDate>
        <TerritoryCode>1</TerritoryCode>
        <Dwelling>
            <PerilDeductible>250</PerilDeductible>
            <FireAlarmInd>0</FireAlarmInd>
            <BurgularAlarmInd>1</BurgularAlarmInd>
            <OccupancyCode>1</OccupancyCode>
            <DwellingValue>125000</DwellingValue>
            <Coverage>
                <CovCode>CovA</CovCode>
                <Limit>125000</Limit>
            </Coverage>
            <Coverage>
                <CovCode>CovC</CovCode>
                <Limit>125000</Limit>
            </Coverage>
        </Dwelling>
    </Policy>
</Fire>
```

In the above file, the inputs are EffectiveDate, TerritoryCode, PerilDeductible, FireAlarmInd, BurgularAlarmInd, OccupancyCode, DwellingLimit, CovCode and Limit.

Introduction to Mapping Inputs

Inputs can be mapped at either a global level or a program version level.

- If inputs are mapped at a **global level**, then the mapping will be available for all programs under that subline. This is useful if inputs are the same across all or most of the programs under that subline.
- If the inputs are mapped at a **program version level**, then the mapping will be available for that program version only.

Custom inputs cannot be mapped at a **universal level**.

Regardless of which option you choose, the process of mapping the inputs is the same, with the exception that global mappings are done from the **Global Input Listing**, while program version mappings are done from the **Program Listing** screen. Additionally, you can import a mapping from the global level to the program version level or from the program version level to the global level.

To Map Inputs at the Global Level

1. Navigate to the Global Inputs Listing for the subline where you want to map inputs.
2. On the **Global Inputs Listing** screen, click Map Custom XML.
3. This will open the **Input Mapping** screen.

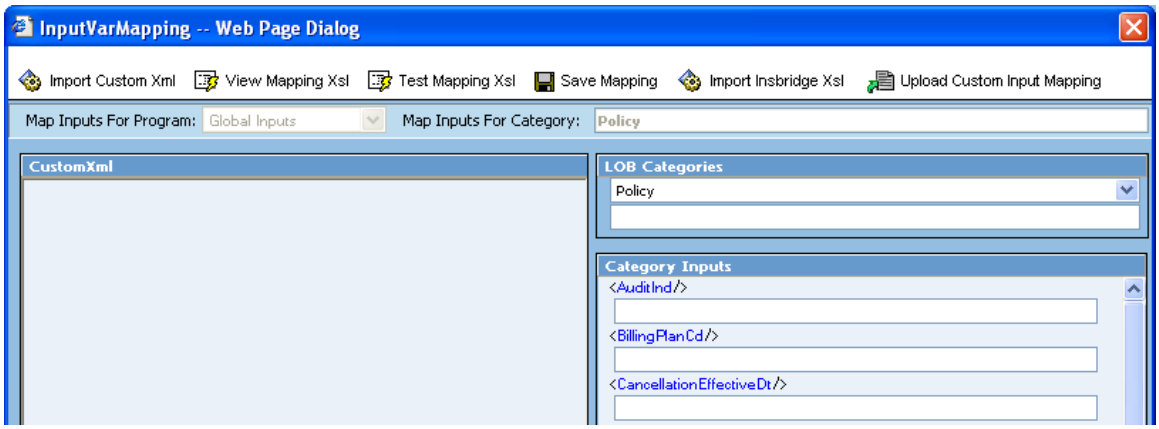


Figure 291 Global Input Mapping Screen

4. At this point, you can begin mapping your inputs. See **Creating a New Input Mapping** for more information, see page 334.

To Map Inputs at the Program Version Level

NOTE	Before creating a mapping at the program version level, create a new local package for it. You will only be able to include the inputs that were used when the last package was created in your mapping.

1. Navigate to the Program Listing screen in the folder(s) that contains the program where you want to map inputs.
2. From the **Program Listing**, double-click the program where you want to add a mapping. The program will expand to show a list of versions.
3. Select the version where you want to map inputs and then right click.
4. Select **Map Custom Input XML** from the popup menu.

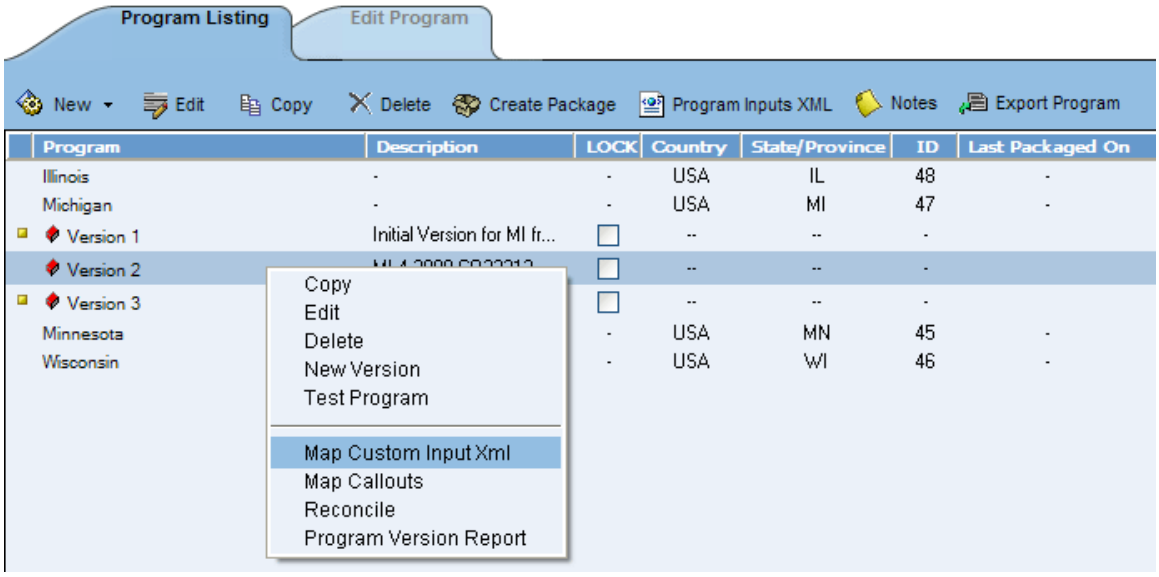


Figure 292 Mapping Inputs at Program Version Level

5. This will open the **Input Mapping** screen.

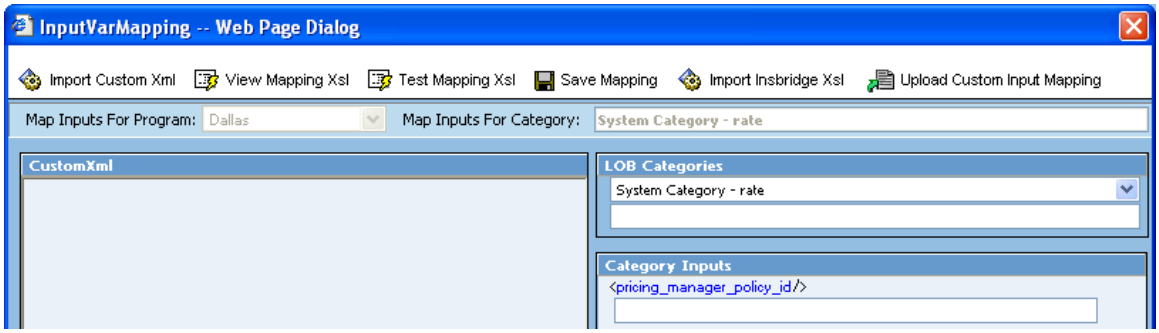


Figure 293 Program Version Mapping Screen

6. At this point, you can begin mapping your inputs. See the next section, **Creating a New Input Mapping**, for more information.

Creating a New Input Mapping

Regardless of which type of input mapping you are creating, the steps for completion are the same. You must be on an Input Mapping screen before you can proceed.

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.

Mapping Inputs

1. From the Input Mapping screen, click the Import Custom Xml button.
2. A text box will open to allow you to paste your custom XML file.

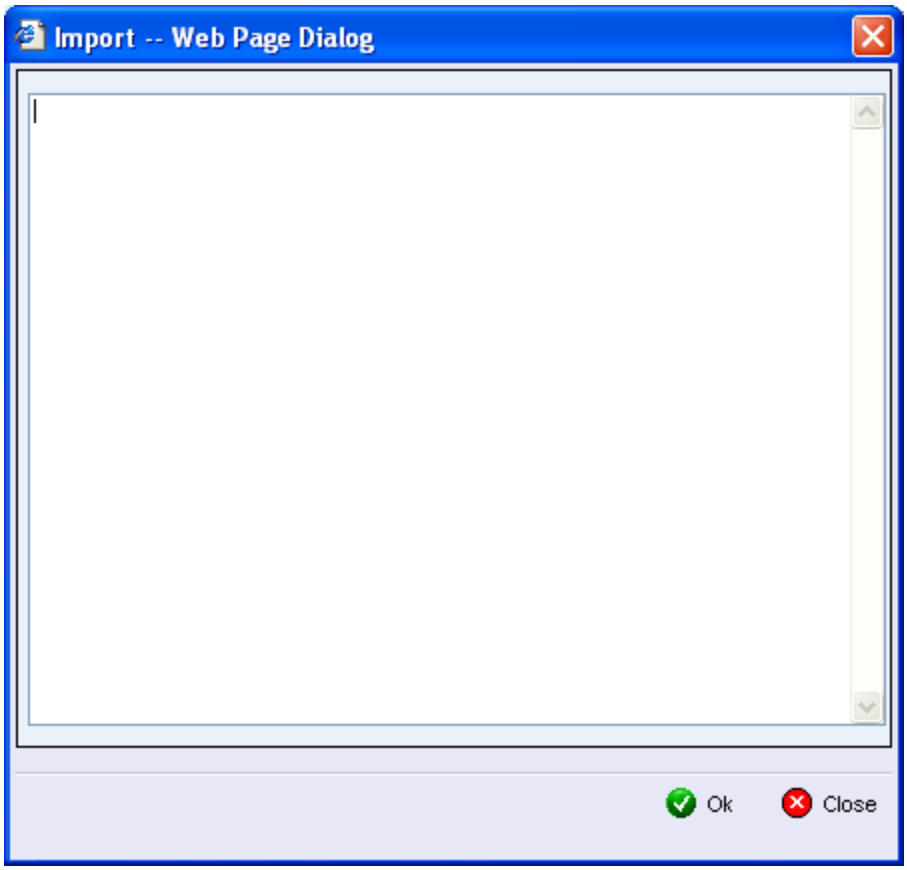


Figure 294 Import Custom XML Text Box

3. Outside of RateManager, open your custom XML file in a text editor or XML editor. Notepad is the simplest and fastest method however; you can use any XML editor you want.
4. In Notepad, select all of the text by selecting **Edit➤Select All** or by pressing **Ctrl+A**.
5. Copy the text to the clipboard by selecting **Edit➤Copy** or by pressing **Ctrl+C**.
6. Return to the text box in RateManager and paste the text by right clicking the text area and selecting **Paste** from the popup menu or by pressing **Ctrl+V**.
7. The XML will be pasted into the text box.

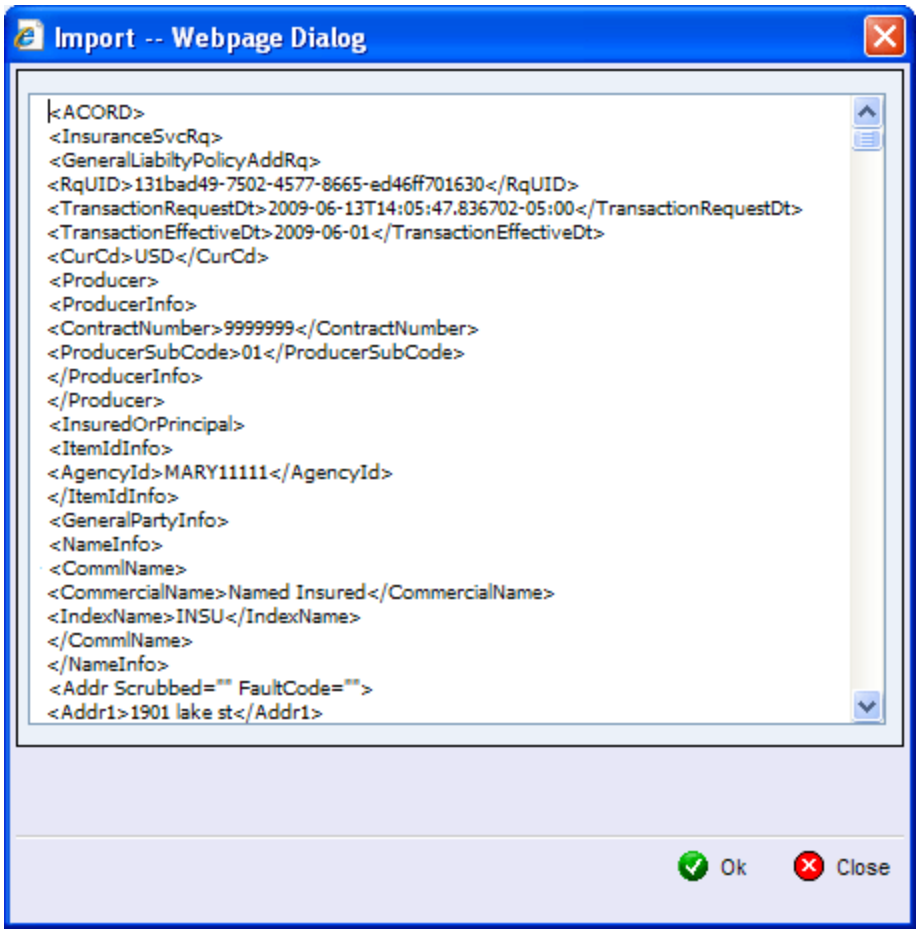


Figure 295 Pasted Custom XML

8. Click **OK**.

9. The custom XML will be imported into RateManager and the **Input Mapping** screen will refresh.

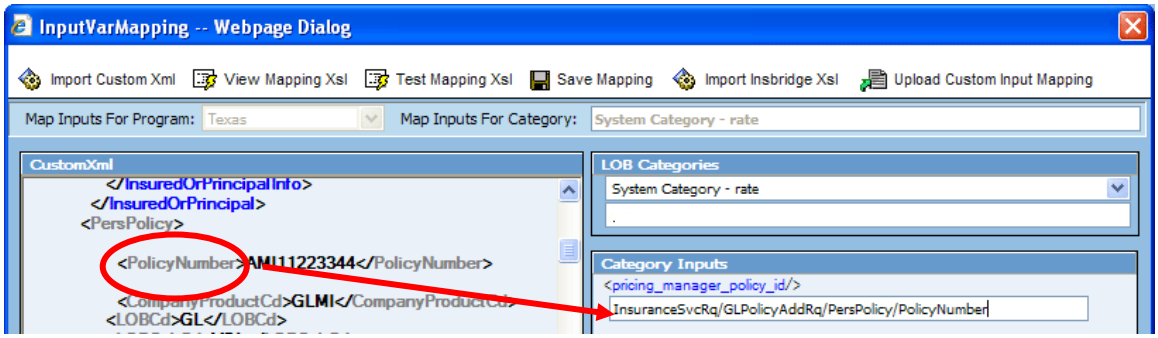


Figure 296 Imported Custom Mapping

10. Now that your custom XML is in RateManager, you need to tell RateManager which category in the custom XML file goes with which category in RateManager. This is done by dragging and dropping the category from the CustomXml area on the left to the blank text box in the LOB Categories area on the right.

11. If you are going to use PricingManager or BatchManager, you must map the System Category – rate. The only input in this category is pricing_manager_policy_id. System Category – rate can be mapped with a single dot to indicate a top level category. For the category input, use a unique identifier such as Policy Number.

12. Repeat this process for all of your RateManager categories. Make sure you map all of your RateManager categories before mapping the inputs. To switch between categories, use the drop down text box. If you are mapping at the program version level, you will only see the categories that are used in the program. If you are mapping at the global level, you will see all categories.

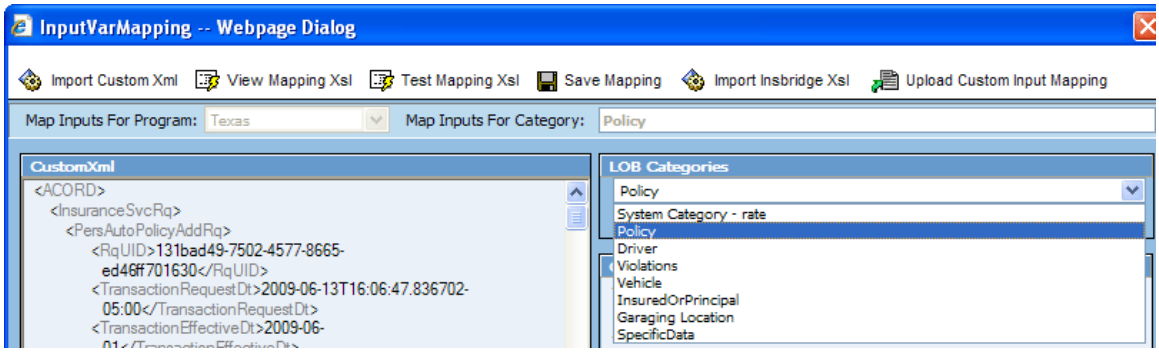


Figure 297 Dragging and Dropping Categories

13. Once you have mapped all the categories, you can begin mapping the inputs. Inputs are mapped using the same drag and drop technique used to map the categories. If you are mapping at the program version level, you will only see the inputs used by the current program. Each Input located under the Category Inputs area needs to have a value. Be sure to map all the inputs. If you are mapping at the global level, you will see all inputs for the current subline. You will only need to map the inputs that are used in the programs that will use the mapping.

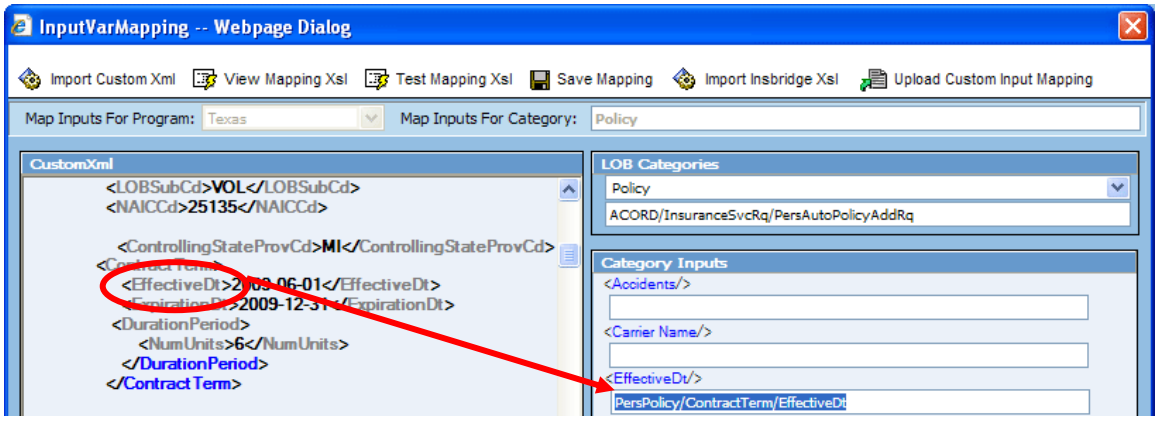


Figure 298 Dragging and Dropping Inputs

14. Once you have finished mapping the categories and inputs, you need to save the mapping. To do this, click the Save Mapping button.

Save Mapping

The save mapping screen allows you to specify a unique identifier for the mapping. Unique identifiers allow you create multiple versions. You can create as many versions as you need. Versions will be listed in the space underneath. If there's no identifier, then the default identifier has been used.

Right clicking any saved mapping allows you to:

- View the custom mapping
- Delete the mapping. Deleting does not issue a warning message.

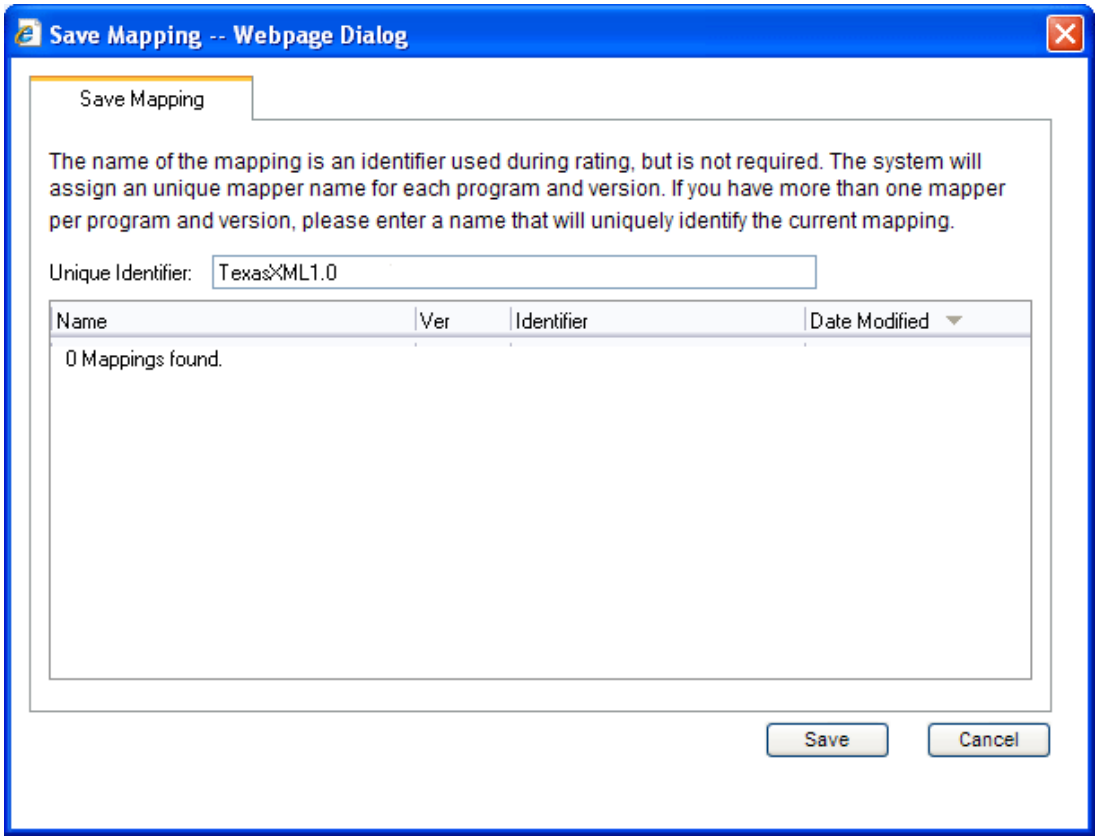


Figure 299 Saving the Custom XML Mapping

15. If you do not enter a unique identifier, the mapping will be saved using your subscriber ID, the line of business number, the program ID and the program version. For example, 123_5_6_1.xslt, which means subscriber 123, line of business 5 (fire), program 6, version 1. The screen will default to the last unique identifier or default identifier name used. If you save without changing the name, you will write over the previous version. No warning will be issued.

    For a global mapping, the mapping will be saved using only your subscriber ID and the line of business number. For example, 123_5.xslt, which means subscriber 123, line of business 5 (fire).

    If you do enter a unique identifier, the mapping will be saved using the same format, except the filename will be appended with the unique identifier you entered. For example,

if you saved the mapping as InputMapping, then it would be saved as 123_5_6_1.InputMapping.xslt at the program version level or 123_5.InputMapping.xslt at the global level.

Although you will not need the filename when rating, you will need to know your subscriber ID, the line of business number, the program ID, the program version and the unique identifier for the mapping.

16. Finally, you will need to create a new package for the program you created the mapping for. If you created a global mapping, you will need to create a new package for every program that will use the mapping.

17. For information on using the mapping while rating, see Rating a File with a Mapping.

Creating a New Output Mapping

Unlike an input mapping, an output mapping can only be created for a specific program version (program version level). This is due to the fact that result mappings are created at the program version level.

Preparation for Mapping an Output File

Before you begin the process of creating a mapping, you will need a sample of the custom XML file that you want to receive after rating. Make sure the file contains all the outputs that you will need. An example of a custom output XML file for a fire program is shown below:

```
<Fire>
    <Policy>
        <TotalPolicyPremium>250</TotalPolicyPremium>
        <Dwelling>
            <LocationNumber>1</LocationNumber>
            <Coverage>
                <CovCode>CovA</CovCode>
                <CovPremium>125</CovPremium>
            </Coverage>
            <Coverage>
                <CovCode>CovC</CovCode>
                <CovPremium>125</CovPremium>
            </Coverage>
        </Dwelling>
    </Policy>
</Fire>
```

In the above file, the outputs are TotalPolicyPremium, LocationNumber, CovCode and CovPremium.

Mapping Outputs

1. Navigate to **Result Mapping** for the program and version where you want to create a mapping. This will place you on the **Result Group Listing** screen.

2. Double-click the result group you want the output mapping based on to open it.

3. This will open the **Edit Group** screen, as shown below.

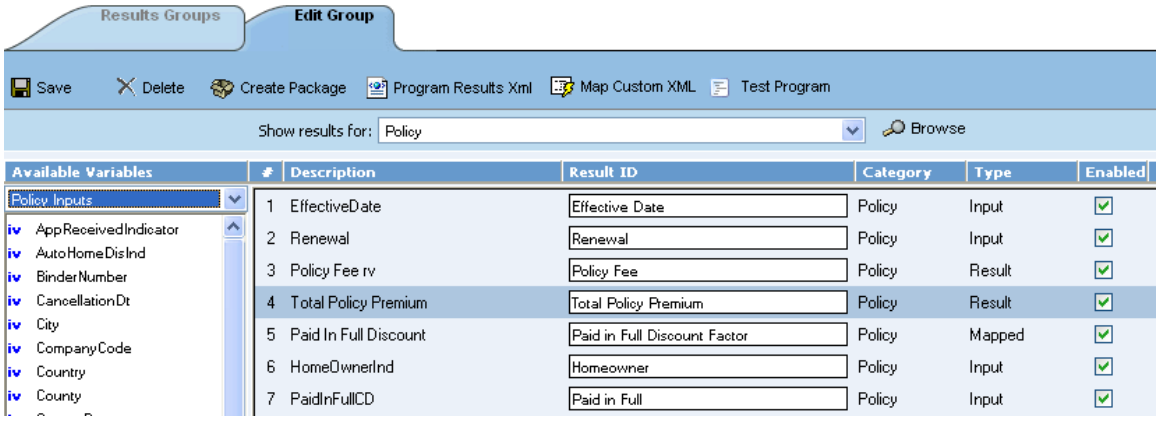
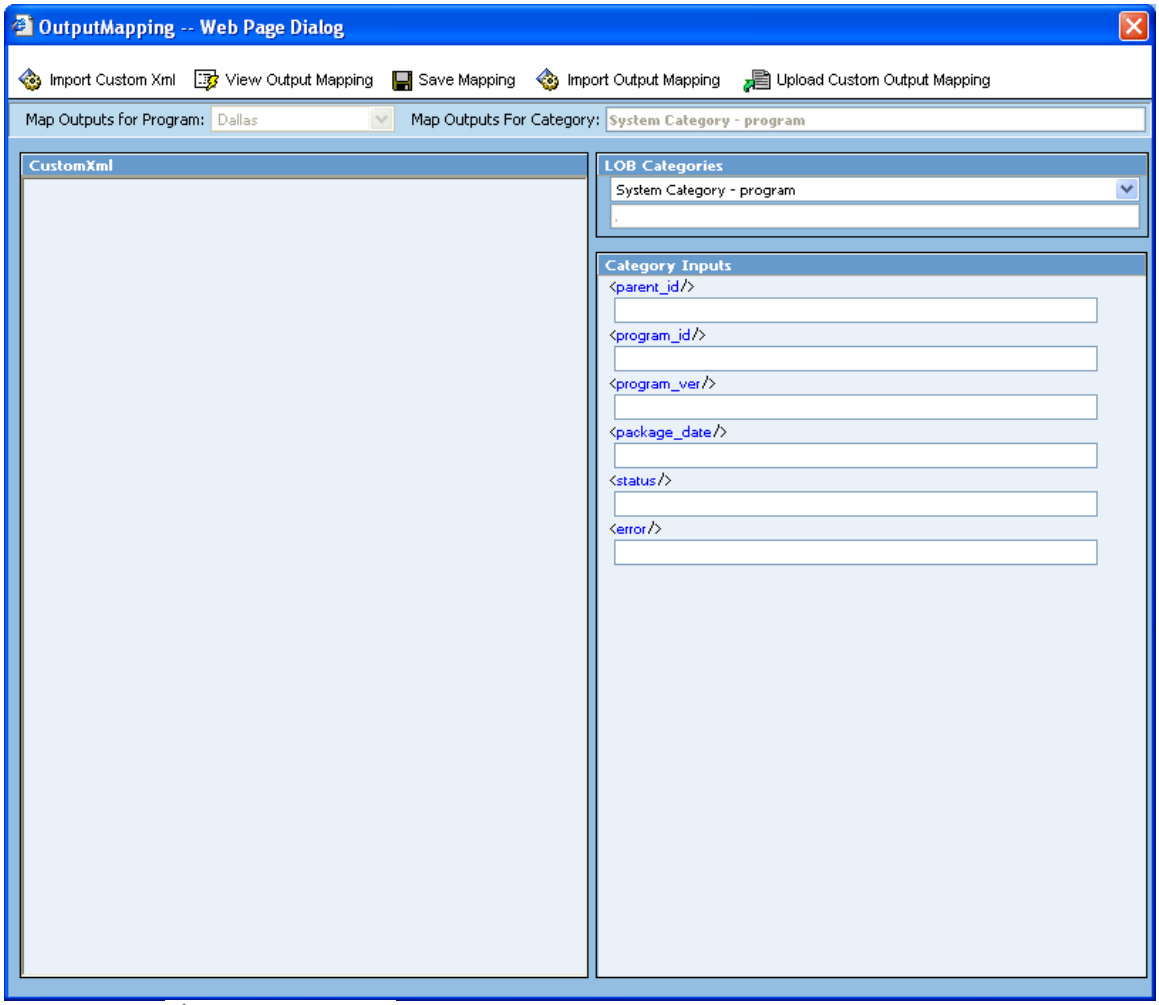


Figure 300 Edit Group for Output Mapping

4. Check that all the results you want to see in the output have been added to the group. Also make sure there is a check in the **Enabled** box at the end of the row for each result you want to see in the output. If you make any changes, be sure to save the group before creating a mapping.

5. Click

. This will open the **Output Mapping** screen.



6. Click Import Custom Xml.

7. A text box will open to allow you to paste your custom XML file.

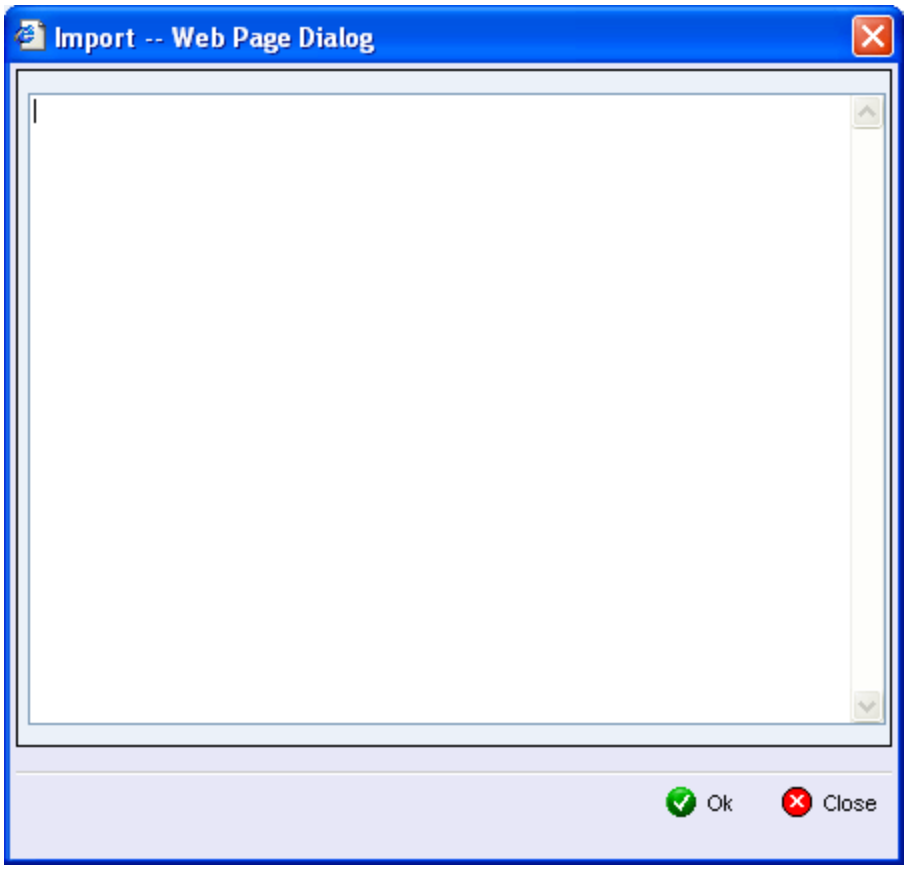


Figure 301 Import Custom XML

8. Outside of RateManager, open your custom XML file in a text editor or XML editor. Notepad is the simplest and fastest method however; you can use any XML editor you want.

9. Select all of the text by selecting **Edit➤Select All** or by pressing **Ctrl+A**.

10. Copy the text to the clipboard by selecting **Edit➤Copy** or by pressing **Ctrl+C**.

11. Return to the text box in RateManager and paste the text by right clicking the text area and selecting **Paste** from the popup menu or by pressing **Ctrl+V**.

12. The XML will be pasted into the text box.

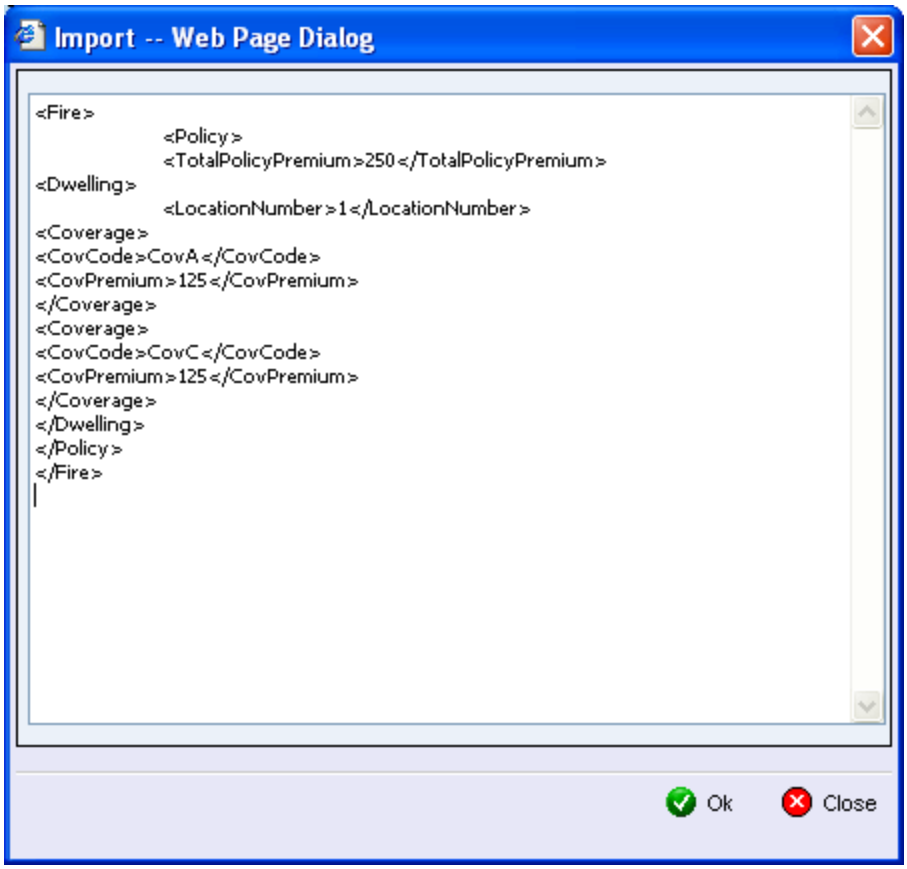


Figure 302 Pasted Custom XML

13. Click **OK**.

14. The custom XML will be imported into RateManager and the **Output Mapping** screen will refresh.

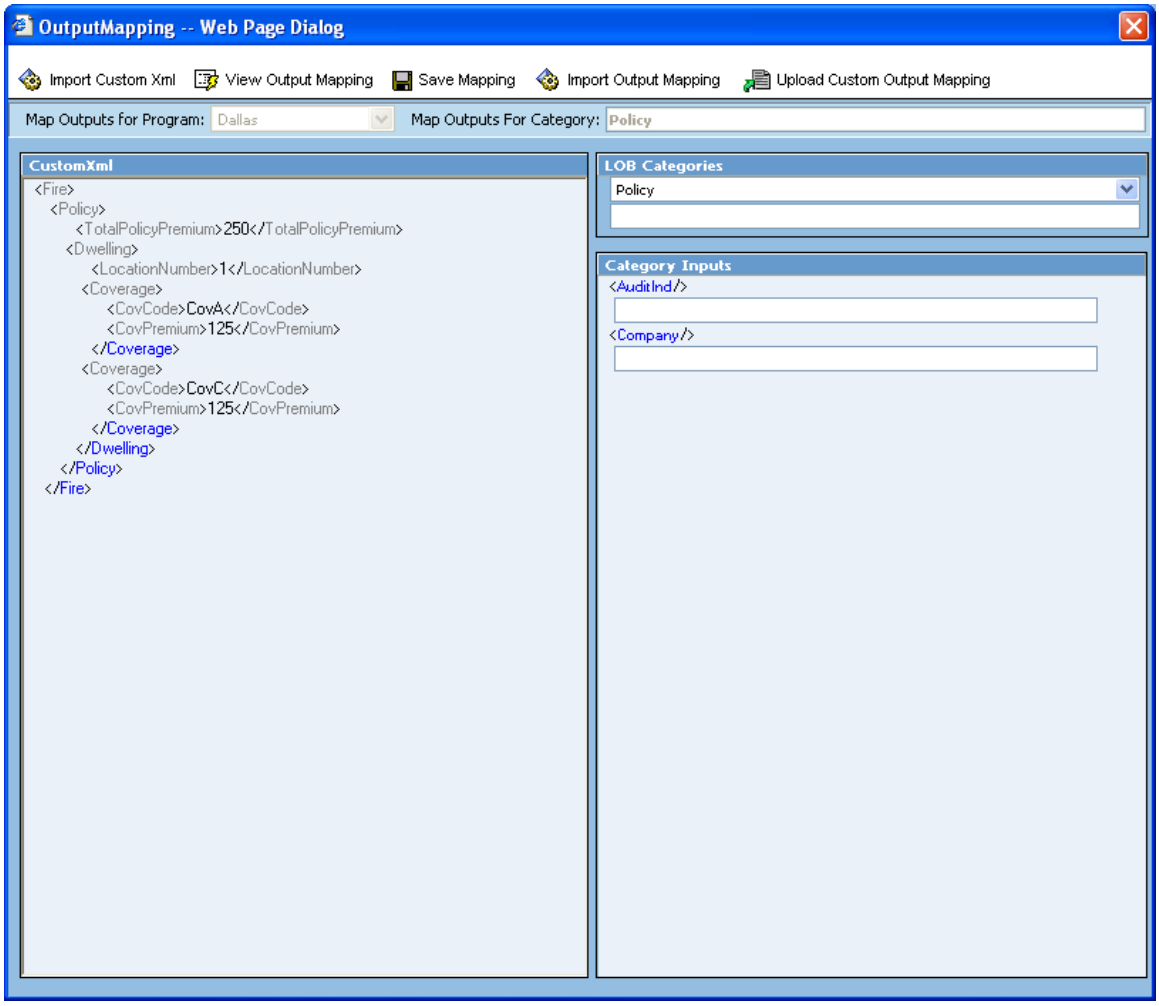


Figure 303 Output Mapping with Custom XML

15. Now that your custom XML is in RateManager, you need to tell RateManager which category in the custom XML file goes with which category in RateManager. This is done by dragging and dropping the category from the Custom Xml area on the left to the LOB Categories text box on the right.

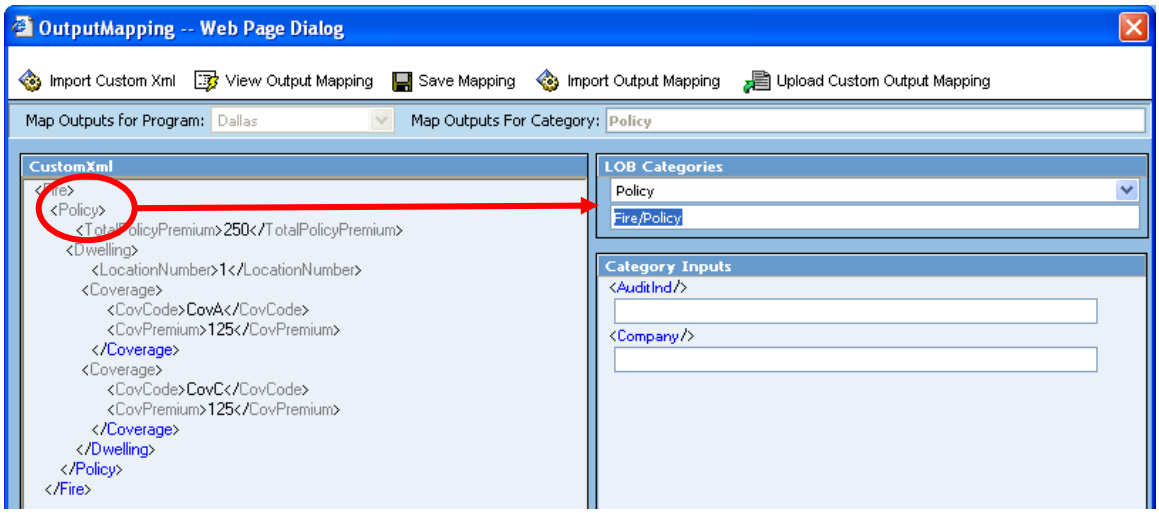


Figure 304 Mapping Categories

16. Repeat this process for all of your RateManager categories before proceeding to the outputs. To switch between categories, use the drop-down text box. You will only see the categories that are used in the current program version.

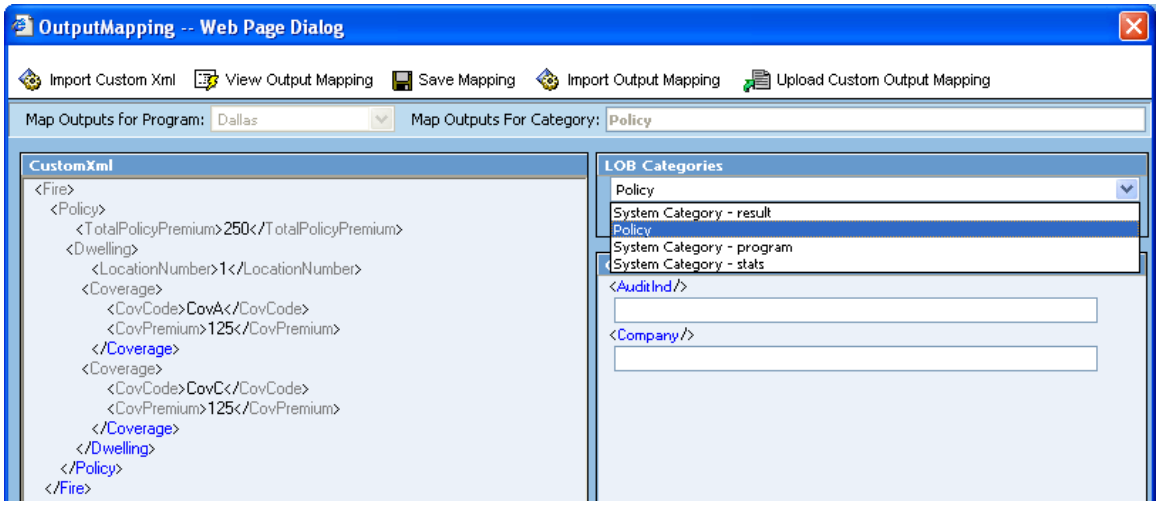


Figure 305 Selecting a Category

17. Once you have finished the categories, you can work on the outputs. Outputs are done using the same drag and drop technique used for the categories. You will only see the outputs used by the current program version. Each RateManager output on the right needs to have a value.

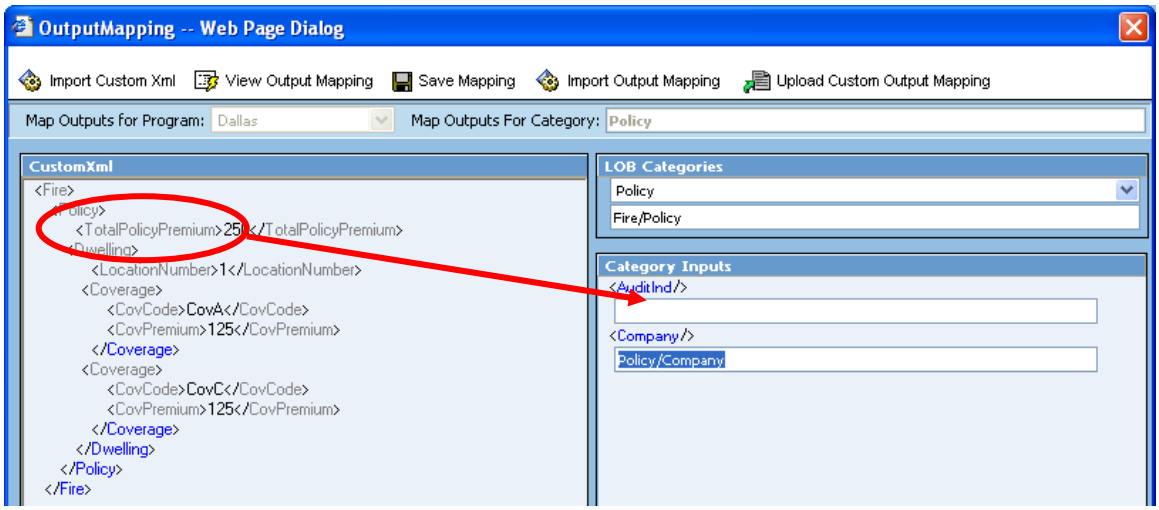


Figure 306 Mapping Inputs

18. Once you have finished the categories and outputs, you need to save the mapping. To do this, click Save Mapping .

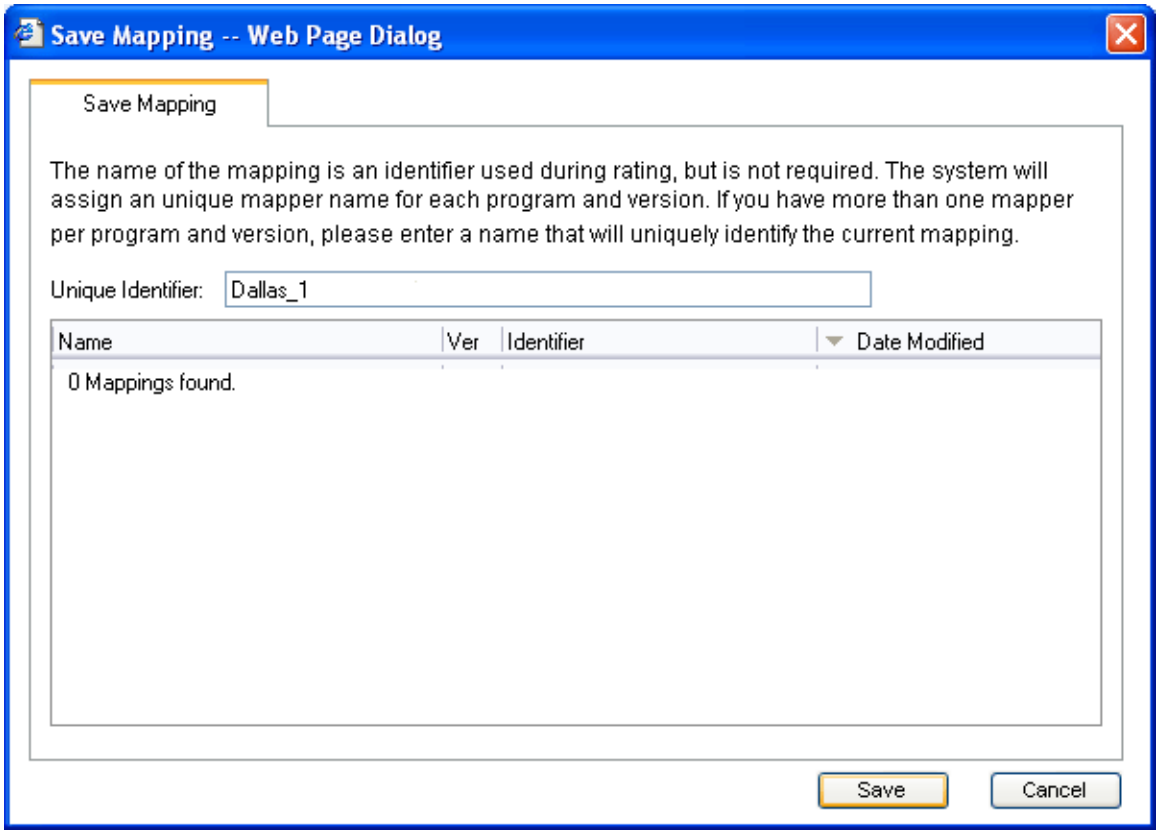


Figure 307 Save Custom XML Mapping

Save Mapping

The save mapping screen allows you to specify a unique identifier for the mapping. Unique identifiers allow you create multiple versions. You can create as many versions as you need. Versions will be listed in the space underneath. If there's no identifier, then the default identifier has been used.

Right clicking any saved mapping allows you to:

- View the custom mapping
- Delete the mapping. Deleting does not issue a warning message.

19. If you do not enter a unique identifier, the mapping will be saved using your subscriber ID, the line of business number, the program ID and the program version. For example, 123_5_6_1.xslt, which means subscriber 123, line of business 5 (fire), program 6, version 1.

    If you do enter a unique identifier, the mapping will be saved using the same format, except the filename will be appended with the unique identifier you entered. For example, if you saved the mapping as OutputMapping, then it would be saved as 123_5_6_1.OutputMapping.xslt.

    Although you will not need the filename when rating, you will need to know your subscriber ID, the line of business number, the program ID, the program version and the unique identifier for the mapping.

20. Finally, you will need to create a new package for the program you created the mapping for.

21. For information on using the mapping while rating, see Rating a File with a Mapping.

Rating a File with a Mapping

To test your mapping, you can use ScenarioManager or IBFA (Insbridge Framework Administrator). You will only be able to test input mapping in ScenarioManager. Output mapping can only be tested in the IBFA. In production, the SoftRater WSI is used to specify the mappings. For more information on this, see the SoftRater topic Sample SOAP Request.

Before starting to test, be sure you have created a package. If you are testing in IBFA, you are most likely using a SoftRater environment. If so, be sure a full package has been created and loaded to the proper environment.

Testing in ScenarioManager

1. Navigate to ScenarioManager.

2. Click

. The will open the **Rate New Custom File** window.

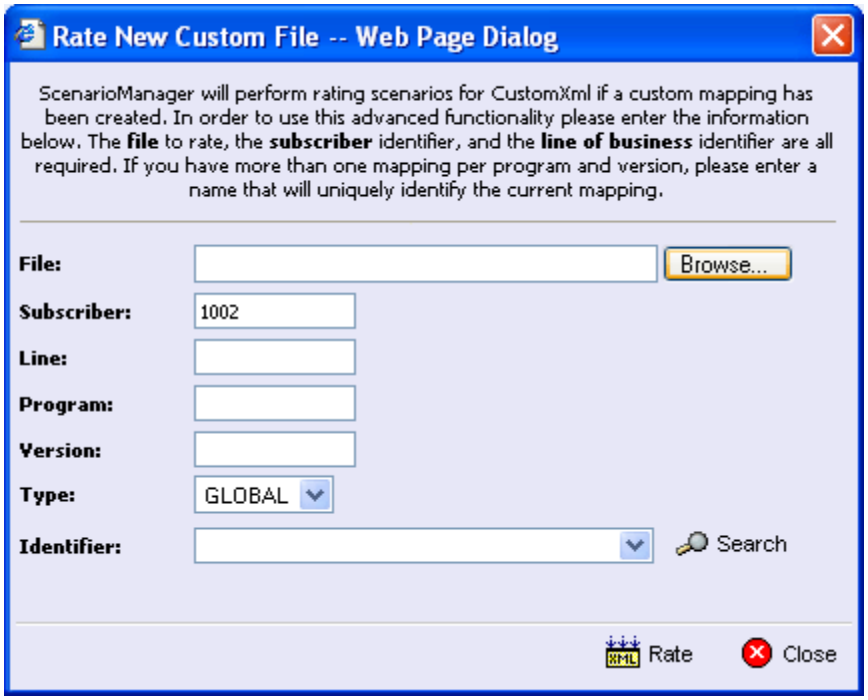


Figure 308 Testing a Mapping in ScenarioManager

3. Browse for the XML file you want to rate.
4. Enter your subscriber ID, if it is not already listed.
5. Enter the number for the line of business you are rating. For example, if you are rating a file for the fire line of business, then enter **5**.
6. Enter the program ID you are rating.
7. Enter the program version you are rating.
8. Select the type of mapping you are using, **GLOBAL, LOCAL** or **CUSTOM**.

   GLOBAL: A mapping that can be used by all programs under a specific line of business. Global mappings are created from the **Global Inputs** screen.
   LOCAL: A mapping that is specific to a particular program version. Local mappings are created from the **Program Listing** screen.
   CUSTOM: A mapping that was created outside of RateManager and then imported.

9. Select the unique Identifier from the drop down menu.

   When you select the file you want to test, the Identifier will automatically be updated with the available files for you to select.

10. The example below is for subscriber **1002,** line of business **5** (fire), program **6,** version **1**. It uses a **GLOBAL** mapping that has a unique identifier of **InputMapping**.

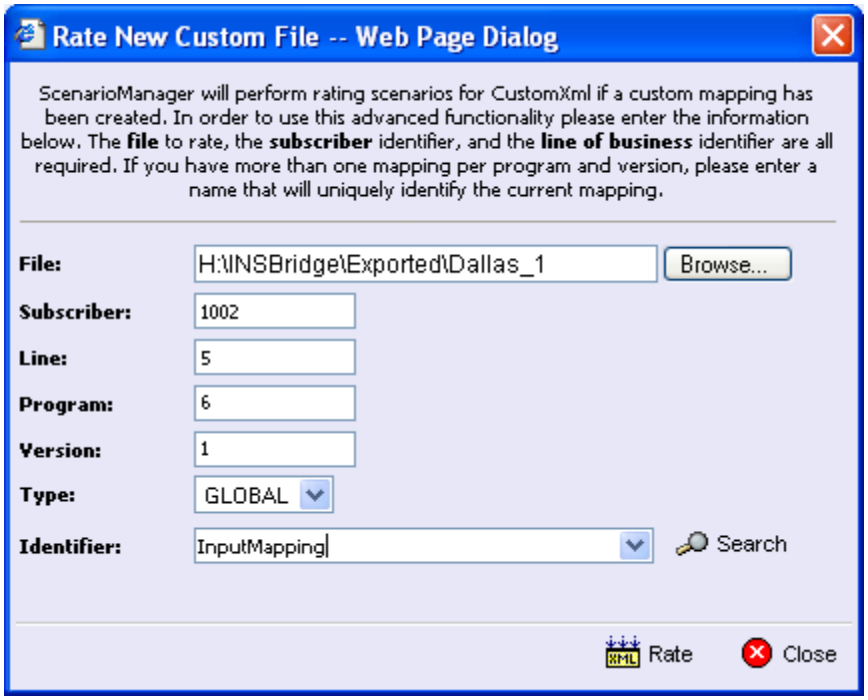


Figure 309 Completed New Custom File Testing

11. When you have finished entering the information, click Rate.
12. The file will be rated and displayed in the list of input files and the results will be in the list of result files. You can open the result file by double-clicking it, just like a standard rating report.
13. If you want to rate a custom file with debug, be sure to select the debug checkbox in the top bar menu before rating the file.
14. If you want to re-rate the file, you can either double-click it or select it and click Rate XML File. If you double-click the file, it will be re-rated with the same mapping. If you click Rate XML File, you will have the option to change the mapping used.

Testing in IBFA

1. Navigate to the **SoftRater Test Interface** located on the **SoftRater** screen.
2. Browse for the file you want to rate or enter the XML in the text box.
3. Expand the **Maprequest Operators** section by clicking .

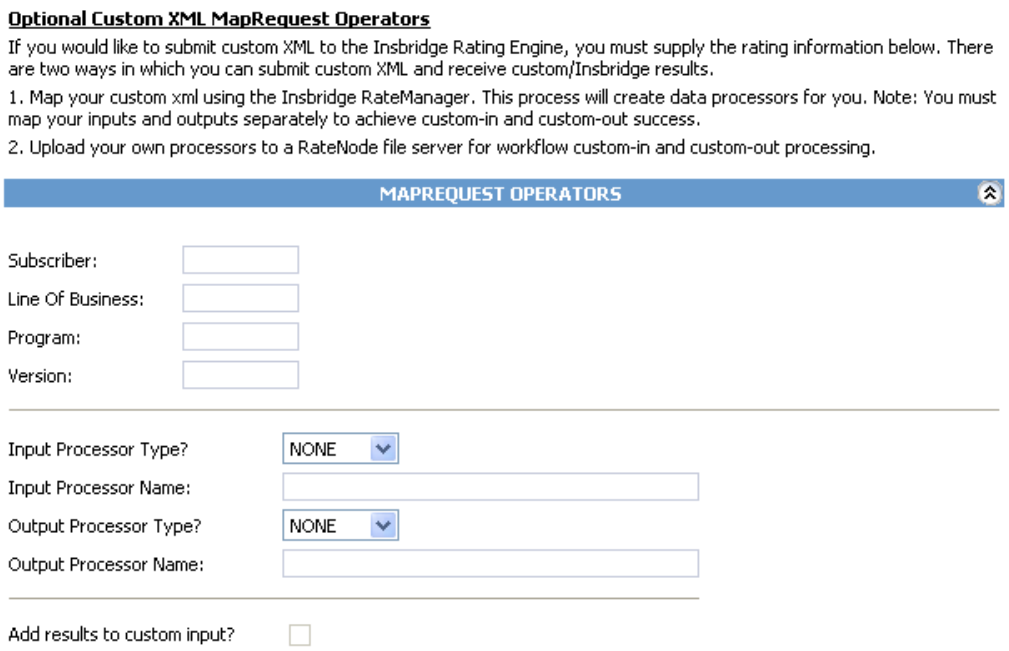


Figure 310 Testing a Mapping in IBFA

4. Enter your subscriber ID.
5. Enter the number for the line of business you are rating. For example, if you are rating a file for the fire line of business, then enter **5**.
6. Enter the program ID you are rating.
7. Enter the program version you are rating.
8. Select the type of input mapping you are using, **GLOBAL**, **LOCAL** or **CUSTOM**.
9. If you saved the input mapping with a unique identifier, enter it in the **Input Processor Name** box.
10. Select the type of output mapping, if any, you are using, **GLOBAL**, **LOCAL** or **CUSTOM**.
11. If you saved the output mapping with a unique identifier, enter it in the **Output Processor Name** box.
12. The example below is for subscriber **123,** line of business **5** (fire), program **6,** version **1**. It uses a **GLOBAL** input mapping that has a unique identifier of **InputMapping**. It uses a **LOCAL** output mapping that has a unique identifier of **OutputMapping**.

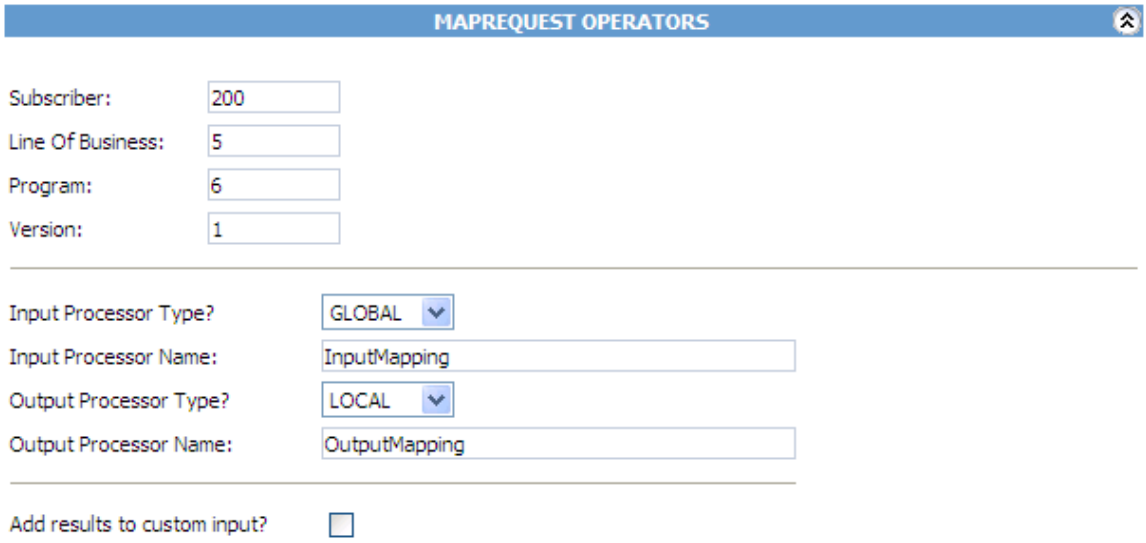


Figure 311 Completed IBFA Testing

13. If you are using both a custom input and custom output mapping and you want the results to be added to the original input file, select **Add results to custom input**.

14. Select any Rate Operators you want to use in conjunction with the Maprequest Operators. For more information, see the SoftRater Test Interface topic Optional Rate Operators.

15. Click Execute!.

16. The file will be rated and the results will be returned in the **Result Information** text box.

Using a Style Sheet Not Created in RateManager

In order for SoftRater to use an existing mapping (i.e. a mapping not created in RateManager), the mapping must be imported into RateManager. Unlike mappings created in RateManager, all custom mappings are saved at the global level regardless of whether they were imported at a program version level or at a global level. If the mapping changes, the mapping will need to be re-imported into RateManager.

To Import a Mapping into RateManager

1. Navigate to the Global Inputs Listing for the subline where you want to map inputs.

2. On the **Global Inputs Listing** screen, click Map Custom XML.

3. This will open the **Input Mapping** screen, shown below.

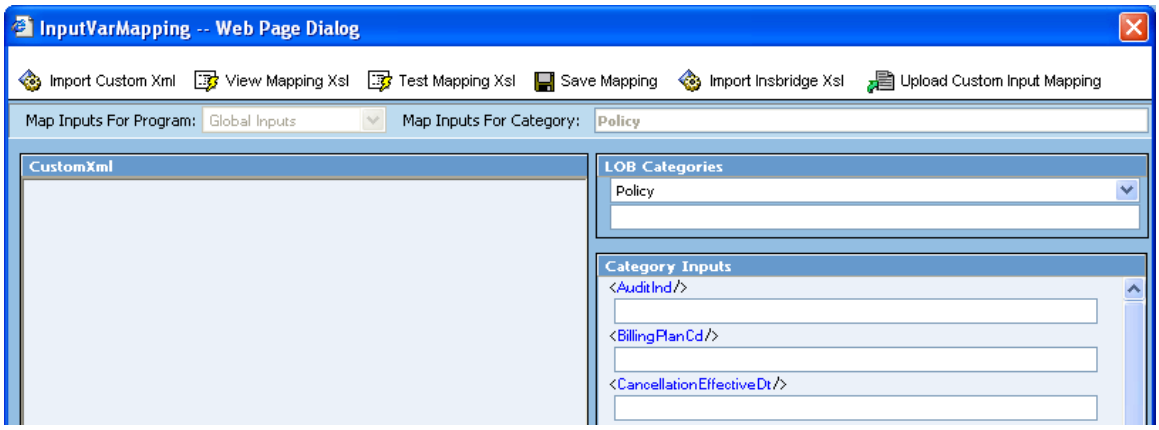


Figure 312 Input Mapping Screen

4. Click Upload Custom Input Mapping. This will open the **Upload Custom Mapping** box.

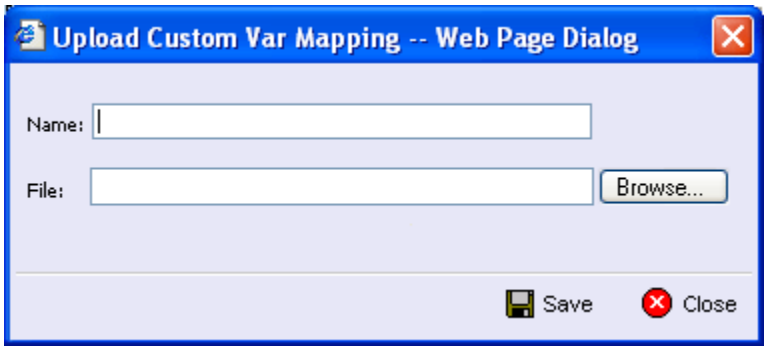


Figure 313 Uploading a Custom Mapping

5. Enter a unique name for the mapping and then enter the location to the mapping. Click Browse... to quickly locate the file. When you are finished, click Save.

6. The mapping will be imported and can now be used when rating files in ScenarioManager. It is not necessary to create a new package before using the mapping. See Rating a File with a Mapping for more information.

17

Introduction to Packaging

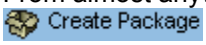
At the end of program development or when a change is made to a program, a process called creating a package must be performed to update the SoftRater rating engine with the logic and tables built in RateManager. A package is a small file that holds all the RateManager logic for a specific program and version.

RateManager supports two kinds of packages. The first is called a *local package*. A customer hardware environment may include many different SoftRaters. During the RateManager installation, one SoftRater is always designated as "local". The local SoftRater exists in the development environment and can be rated against using ScenarioManager. When a local package is created in RateManager, it is automatically loaded to the local SoftRater.

The second type of package is called a *full package*. A full package holds all the same data as a local package, but it also contains extra information that allows the package to be moved between SoftRaters. Full packages are usually created to move a program to a different environment. For example, a package may be moved from Development to QA or from QA to Production.

NOTE	Creating a full package also creates a local package.

Creating a Package

From almost anywhere in the program you can create a package by clicking on the 

button on the top navigation bar. You also can right click any version to get the Create Versioning Package option. The Program ID number is generated and assigned the first time a package is created for a program. For more information, see Introduction to Packaging.

To Create a Package

The steps below outline creating a package from the program listing screen. The same steps (excluding 1 and 2) can be followed to create a package from the following screens:

- Variable listing
- Algorithm listing
- Driver assignment scenario listing
- Sequencing
- Result group listing
- Edit result group

NOTE	You also can create a package by right clicking the version on the left hand side of the screen. This will pull up the create package popup. This feature can be used at any time and does not require you to leave the screen you are currently working in.

For these screens, click the Create Package button available from the navigation bar.

1. Navigate to the **Program Listing** screen for the subline and folder(s) that contains the program version you want to package.
2. Double-click the program where you want to create a package. This will expand the program and show the versions.

Figure 314 Creating a Package

3. Select the version you want to package and click Create Package. **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.

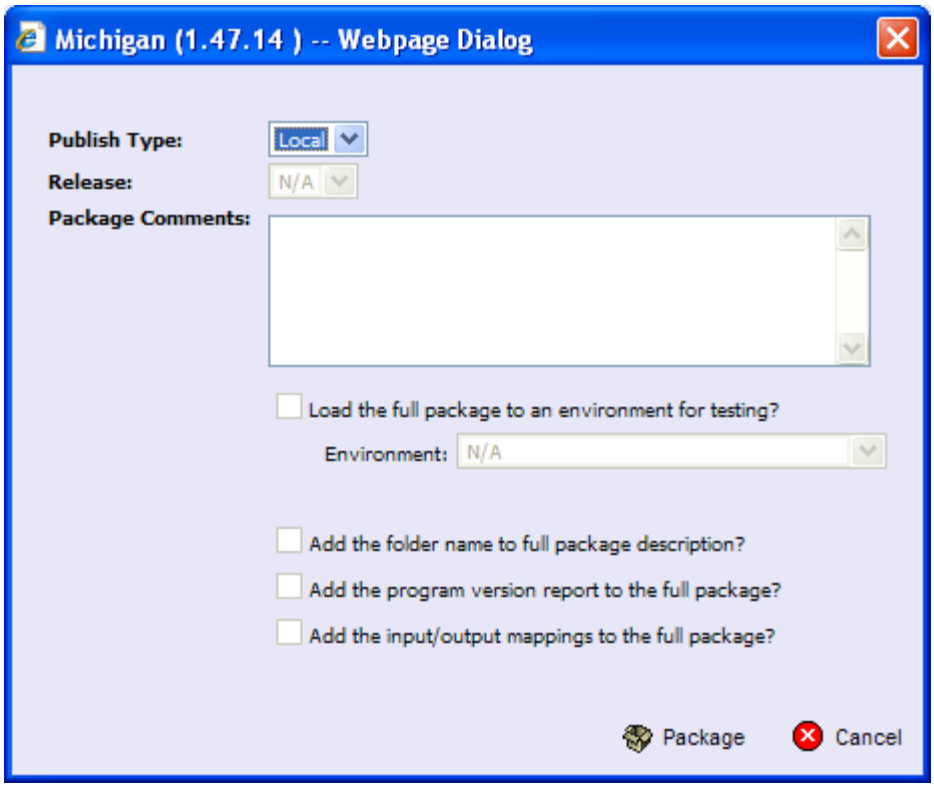


Figure 315 Selecting the Version to Package

Screen Options

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 a 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.

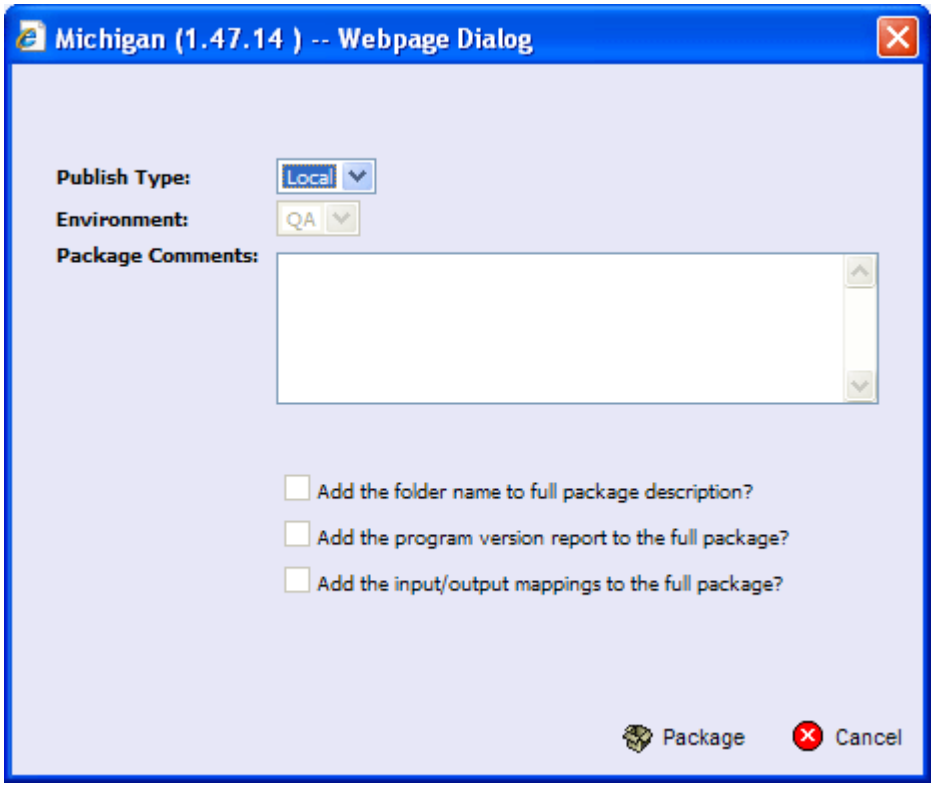
Environment: Select the environment where you want to load the package for testing.

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.

If "Enforce Release Packaging" is disabled in the Application Settings screen, this dialog will appear:



NOTE	The screen that is displayed and the options that you can select will depend upon whether or not the system administrator has enabled the “Enforce Release Packaging”.

4. When you have finished setting the package options, click Package. The packaging process will start and the progress will be shown. A summary will be shown when packaging is finished.

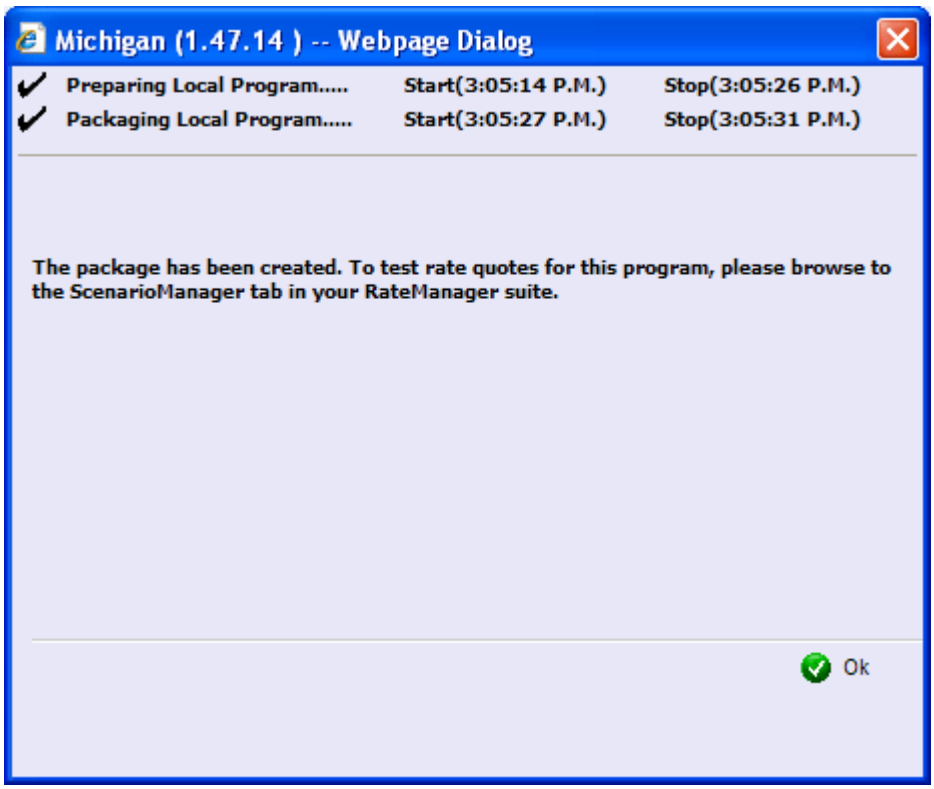


Figure 316 Packaging Summary Screen

5. If you created a local package, you can navigate to ScenarioManager to rate input files. If you created a full package, you can navigate to the SoftRater Explorer to load the package. If you encounter errors while packaging, see Resolving Packaging Errors.

NOTE	With the exception of changes to data tables for mapped variables, you must create a new package every time you make a change to a program, prior to rating. If you only make changes to the data tables for mapped variables, a new package does not need to be created prior to rating. This is **only applicable for Local Package not for** full ones.

Resolving Packaging Errors

There are many reasons why RateManager won't allow a program to be packaged. Usually, however, the reason is simple and resolution is easy. Listed below are the most common packaging errors.

1. **There are no results mapped.** RateManager requires that your program have at least one result (output). This error means you don't have any result groups defined or that there are no results in the result group that is defined. To fix this problem, create results for the program and try the package request again. See Introduction to Result Mapping for more information.

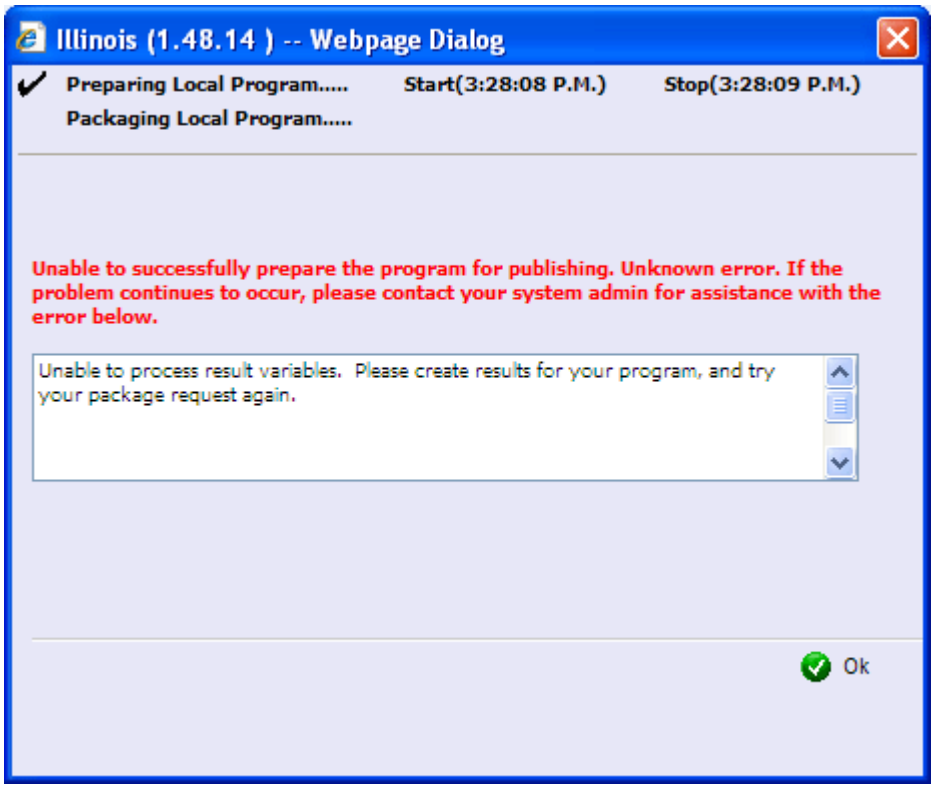


Figure 317 Packaging Errors, No Results Mapped

2. **There are no algorithms in the sequence.** RateManager uses the sequencing to determine which elements (algorithms and variables) to process and the order in which to process them. This error means that you haven't added any algorithms to the program sequencing, or that none of the algorithms in the sequencing are activated. To resolve this error, add at least one algorithm to the program sequencing or activate one of the algorithms already there. See Sequencing for more information.

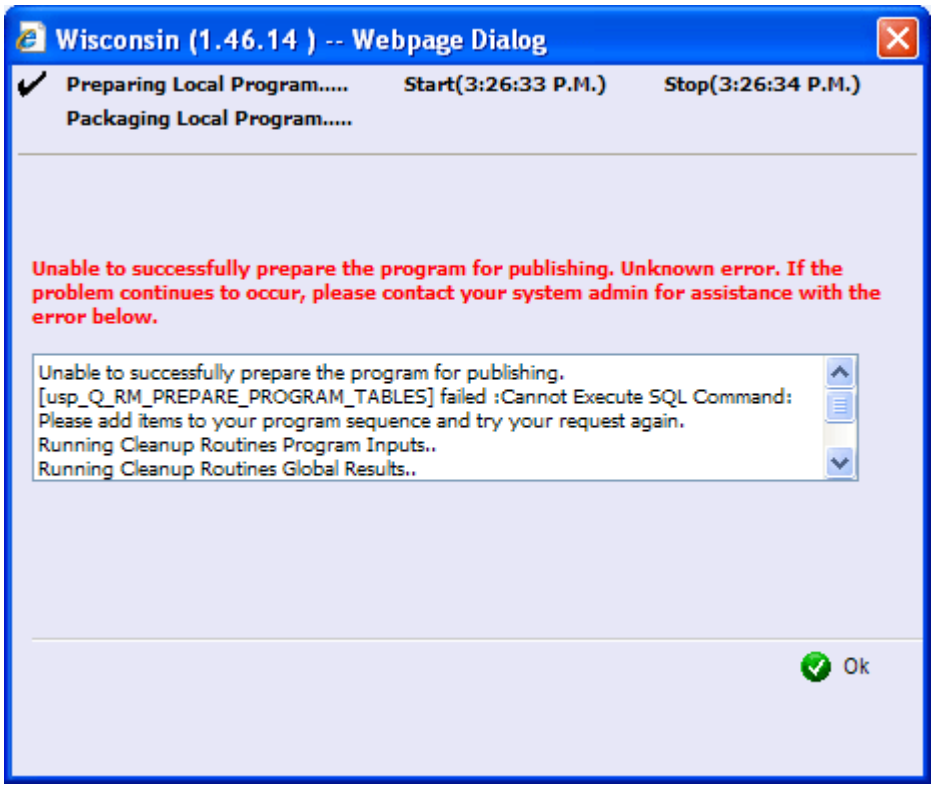


Figure 318 Packaging Errors, No Algorithms in Sequence

3. **At least one of the algorithms in the sequencing does not have an input used for the category.** SoftRater uses inputs to determine which categories need to be processed. If you receive the error below, it means that you have an algorithm in the sequence whose category does not have any inputs used.

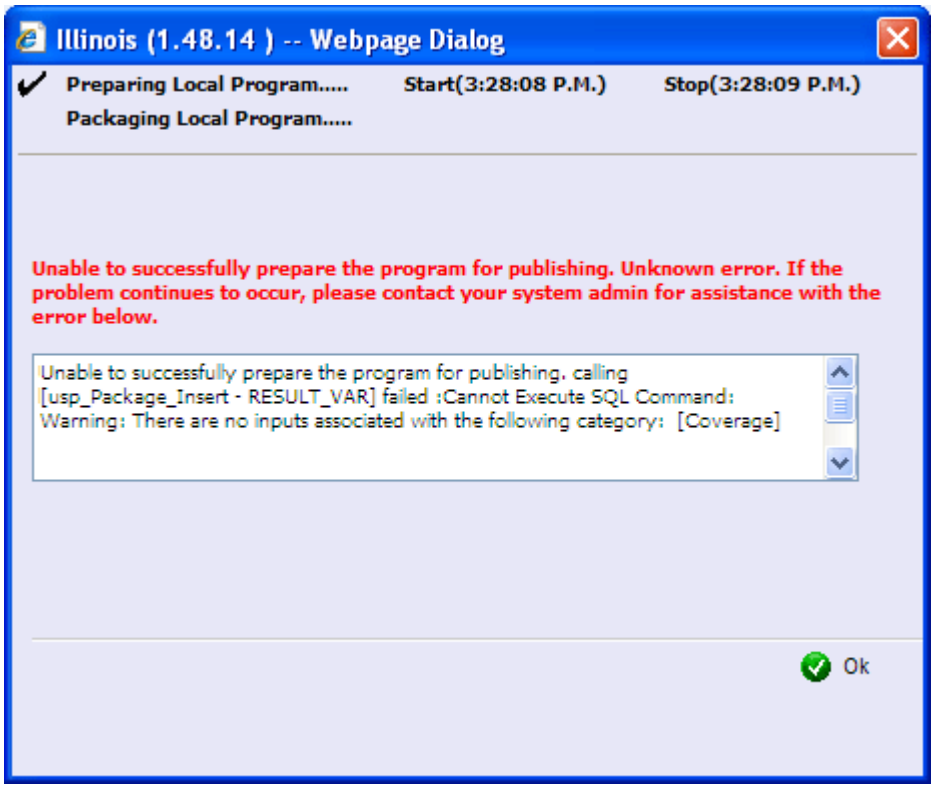


Figure 319 Packaging Errors, Algorithms in Sequence Incorrect

For example, the error in Figure 319 tells us that there are no inputs associated with the Coverage category. This means that there is a Coverage level algorithm in the program sequencing but that none of the algorithms in the sequencing uses a Coverage level input.

To resolve the issue, you can do one of two things:

1. Deactivate all algorithms in that category.

2. Use an input for the category. (An algorithm does not have to directly use an input. The input can be used in a variable that is used in another variable, etc. that is eventually used by an activated algorithm.) No inputs are required for the Driver-Vehicle category.

18

Introduction to Release Management

Release Management allows groups of rating packages to be automatically deployed and loaded to IBFA through a release. With the appropriate rights a user or RateManager Administrator will have the ability to deploy the rates directly to SoftRater without manually loading the packages through IBFA.

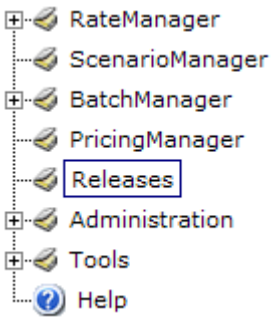
NOTE	Users must have rights to release management in order to view the Releases option in the menu tree. See *Release Management Security* for more information.

From this screen, authorized users will be able to:

- Create New Releases
- Edit Release Options
- Copy Releases
- Lock Releases
- Deploy Releases
- Edit Release Contents
- Create Packages

To Navigate to the Release Listing Screen

1. From the menu tree, click **Releases**.



2. This will show the **Release Management Screen**.

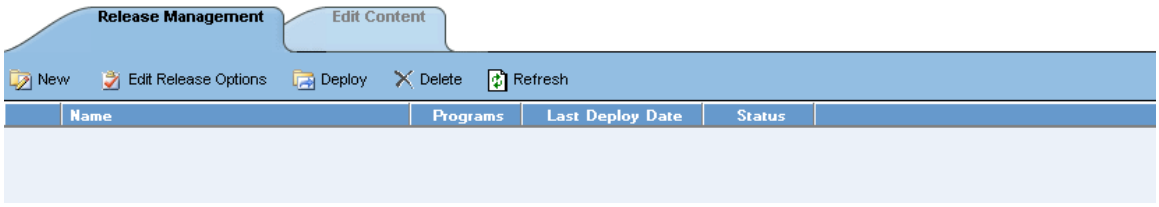


Figure 320 Release Management Screen

Navigation Bar

Edit Content: Opens the Edit Content screen for the currently selected release.

New: Starts the process of creating a new release. See Creating a New Release for more information.

Edit Release Options: Allows you to change information about the selected release. This includes the description, notes, administrator email address and the packaging option.

Deploy: Opens the Deployment Window and allows you to deploy a release to a selected environment.

Delete: Removes the selected release from the release listing.

Refresh: Refreshes the list of releases.

Release Management Listing

Shows a listing of the releases created.

If there is a lock icon in the first column, this indicates the release is locked.

Name: Name of the release.

Programs: The number of programs currently included in the release.

Last Deploy Date: The time stamp of the most recent deployment date.

Status: Shows if any activity is currently processing for the release.

Creating a New Release

RateManager supports an unlimited number of releases.

To Create a New Release

1. Navigate to the Release Management screen.
2. Select New from the menu bar. This will open the **New Release** window.

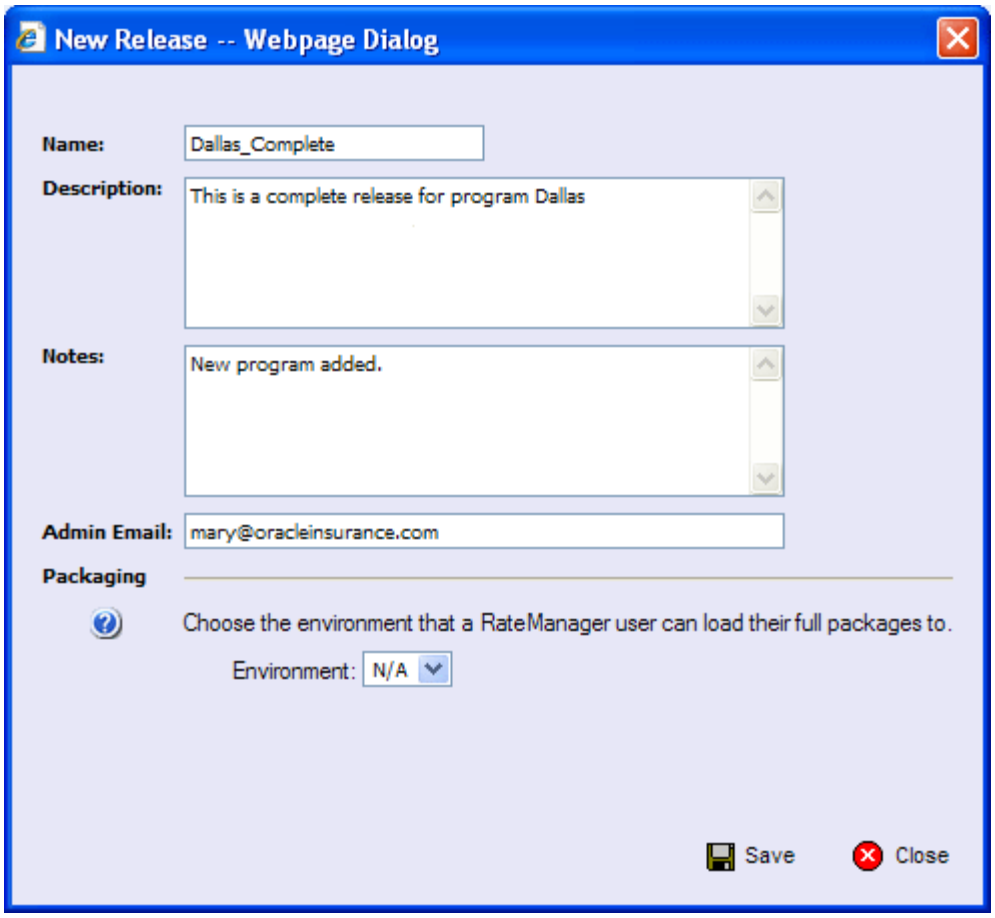


Figure 321 Creating New Release

3. Enter a name, description and any applicable notes for the new release.

4. Enter an email address. This address will be used for all system notifications regarding the release. If an email address has been provided, after deployment to IBFA, a confirmation email will be sent.

5. Choose a development environment to automatically deploy the release to. If no environment has been provided for the release (N/A) administrator users CANNOT create a full package. They will be able to create local packages only.

6. Click Save to save the release.

Edit Release Options

Unlocked releases can be edited at any time. The name will not be open for editing. If you have made a mistake with the name, you can delete and create a new release. Or you can create a copy with the name you want. All other fields are open for changes. Editing is performed in the same screen as creating a new release. Locked releases cannot be edited. You will have to unlock the release to edit.

1. Navigate to the **Release Management** Screen.
2. Select the release you want to edit and click the Edit Release Options button.
3. This will open the **Edit Release Options** screen for the release. Make your changes.
4. Click Save to save the release.

Copy Releases

Any release can be copied at any time. All programs contained within the release will be copied. The included programs will be locked. The copy function is performed from the right click menu.

1. Select the release you want to copy.
2. Right click and select **Copy** from the menu. A separate screen will be displayed.

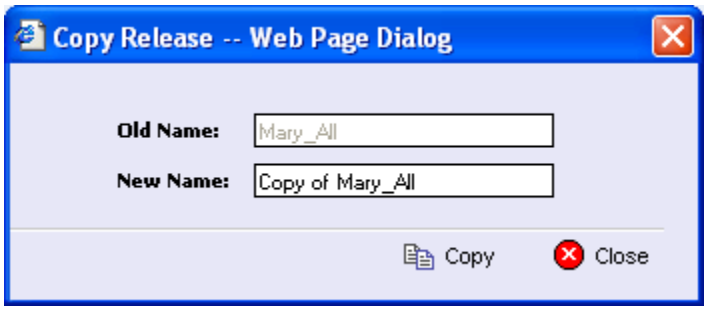


Figure 322 Copy Release

3. Enter in the **name** of the new release.
4. Click **Copy**. The release will be copied.

Locking a Release

Locking a release can be done at any time. A locked release cannot have any programs added or removed. A locked release cannot have the release options changed. If you want to change release options, you must unlock the release. A locked release can be deleted. The lock function is performed from the right click menu.

To Lock a Release

1. Navigate to the Release Management screen.
2. Select the release you want to lock and right click.
3. Select **Lock** to lock the release. On the Release Management screen, a lock icon will be placed in front of the release.

Deleting a Release

Releases can be deleted at any time. It is possible to delete locked releases. All releases can be removed from the screen.

To Delete a Release

1. Navigate to the Release Management screen.
2. Select the release you want to remove and then click Delete. A warning message will be displayed.
3. Select **OK** to remove the release. Select Cancel to return to the Release Management screen without deleting a release.

Deploying a Release

A release can be deployed at any time.

1. Navigate to the **Release Management** Screen.
2. Select the release you want to deploy and click Deploy.
3. This will open the **Deploy Release** window.

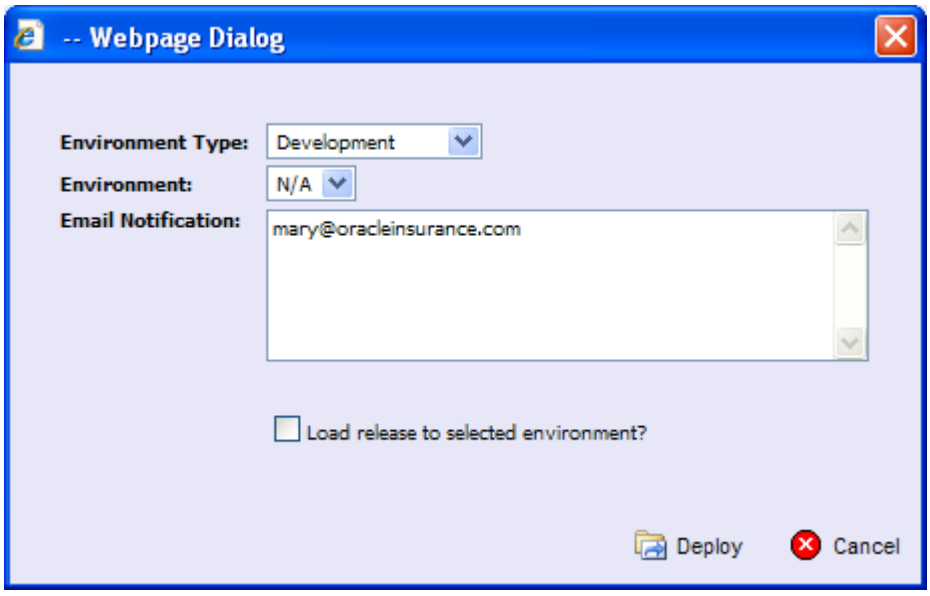


Figure 323 Deploying a Release

4. Select the Environment Type and Environment from the drop down menus. Different environments may be selected to deploy the release to.
5. Enter in the email notification information.

6. Check the “Load release to selected environment?” checkbox to automatically load the release into the selected environment. This allows the release to bypass the IBFA tool and be loaded directly into the environment that you selected.

7. Click Deploy to deploy.

If there are any problems with the deployment environments, please contact your system administrator.

Right Click Menu

Releases will have a right click menu available.

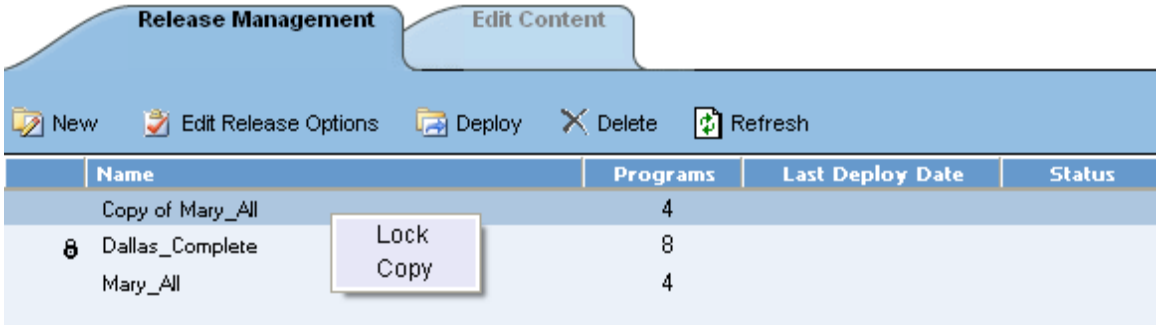


Figure 324 Edit Content Right Click Menu

- **Lock** – allows you to lock the release. The will prevent any further additions or deletions to the release and will not allow release options to be edited.
- **Copy** – allows you to copy the release and all contents.
- **Unlock** – locked packages will have the option to unlock. This will open the release up for editing.

Edit Content

The edit content screen will allow you to add or remove programs from the release. You also can create packages from this screen as well as copy and lock packages. Releases that are not locked can be edited at any time. If a release is locked, you must unlock it before you can continue.

1. Navigate to the **Release Management** Screen.

2. Select the release you want to edit and either double-click it or click the **Edit Content** tab.

3. This will open the **Edit Content** screen for the release. Make your changes.

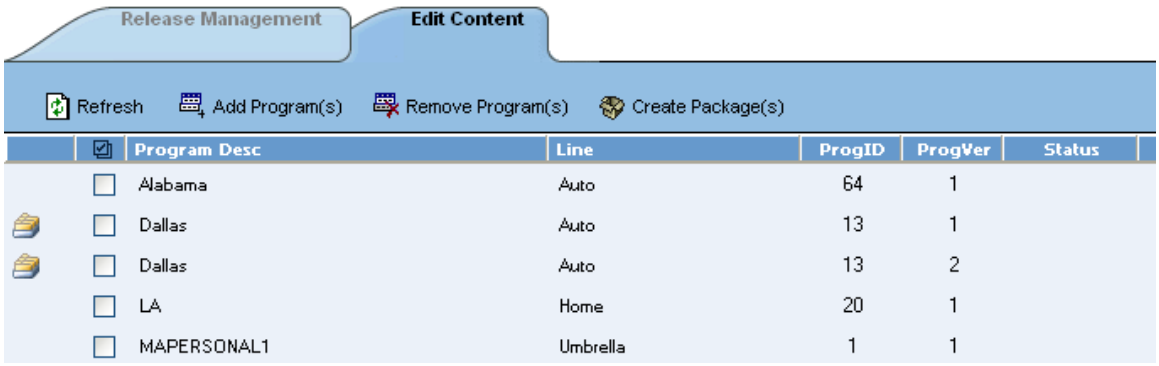


Figure 325 Edit Content for a Release

Navigation Bar

Refresh: Refreshes the Edit Content window.

Add Programs: Opens the Add Program window. This option will not be displayed on locked releases.

Remove Programs: Removes the selected programs from the release. This option will not be displayed on locked releases.

Create Package(s): Packages the selected program(s) for rating and testing. See Introduction to Packaging for more information. This option will not be displayed on locked releases.

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.

Status: Shows if any activity is currently processing for the release content.

Adding Programs to a Release

Multiple program versions from different lines of business, both user generated and template generated may be added to a release at any time.

1. To add a program to a release, click the Add Program(s) button. The **Add Programs** screen will be displayed.

2. Expand the line of business you would like. Select the folder and then choose the program. Place a checkmark next to the version or versions you want to add to your program. You also can add global versioning.

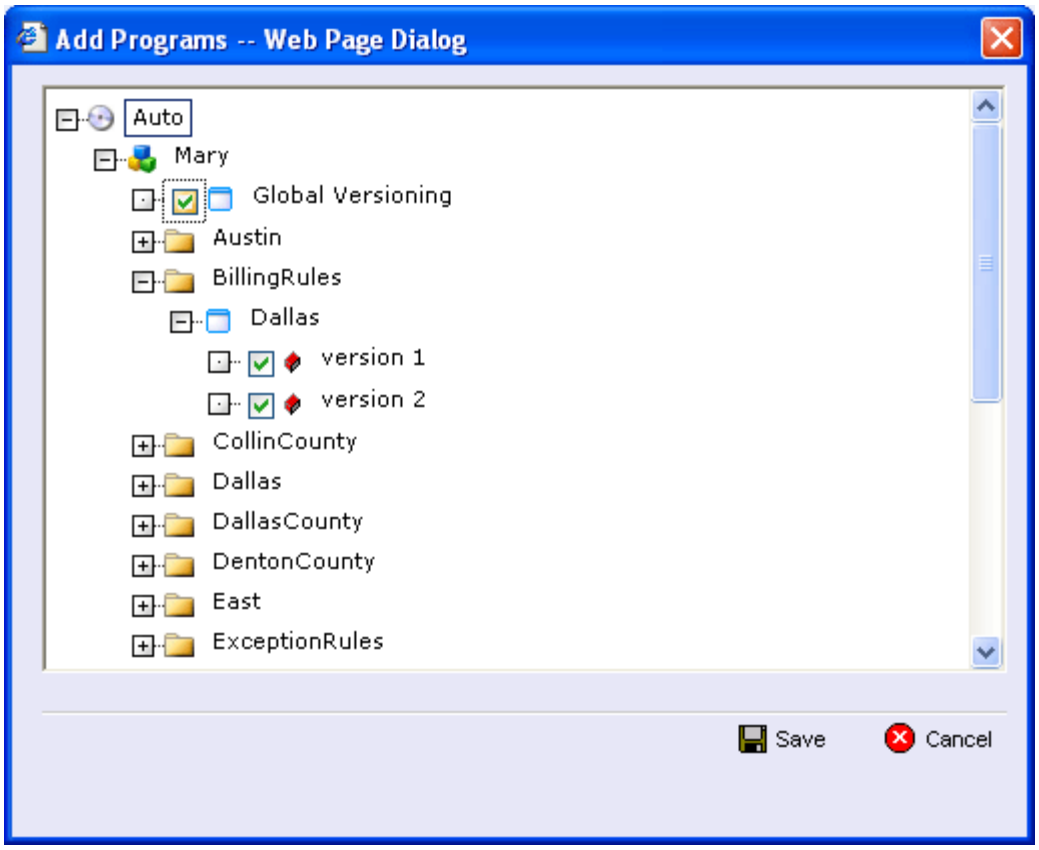


Figure 326 Selected Version to Add to Program

3. Click Save. You will be returned to the Edit Content screen. Your selected versions will be listed.

Removing a Program

To remove any unlocked program, place a checkmark in front of the program you do not want and click Remove Program(s). A warning message will confirm your action. Click **OK** to remove the program or click **Cancel** to cancel the action.

Copy Package

Unlocked, packaged programs will have the option to be copied into another release. To copy a package:

1. On the Edit Content screen, select the program version you want to copy.
2. Right click and select **Copy Package** from the menu. A separate screen will be displayed.

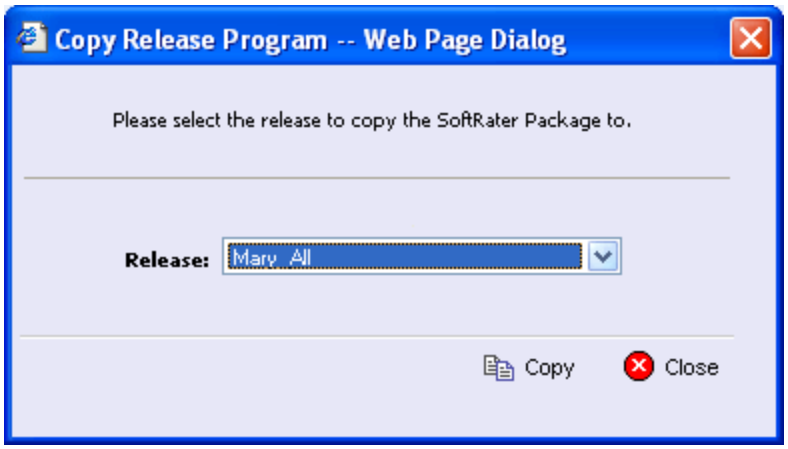


Figure 327 Copy Release Program

3. Select the **Release** you want the copy to go to.
4. Click **Copy**. The program will be copied.

Locking a Package

Packages can be locked at any time. A locked release automatically will have locked packages. Also, a copied release will have locked packages. A locked package that is not also locked by the release can be deleted. The lock function is performed from the right click menu.

To Lock a Package

1. Navigate to the Edit Content screen.
2. Select the program you want to lock and right click.
3. Select **Lock Package** to lock the program. On the Edit Content screen, a lock icon will be placed in front of the program.

Creating Program Packages within a Release

After adding programs to a release, there are 2 ways to create program packages for the release:

1. The Release Administrator may create the packages from the Edit Content tab by selecting the desired programs and clicking Create Package.
2. Non-administrator users may create full packages from the individual program's **Create Package** window. See Introduction to Packaging for more information. If a program version is not added to a release, non-administrator users will not be able to create full package.

Once the package has been created, package icons appear next to the program descriptions.

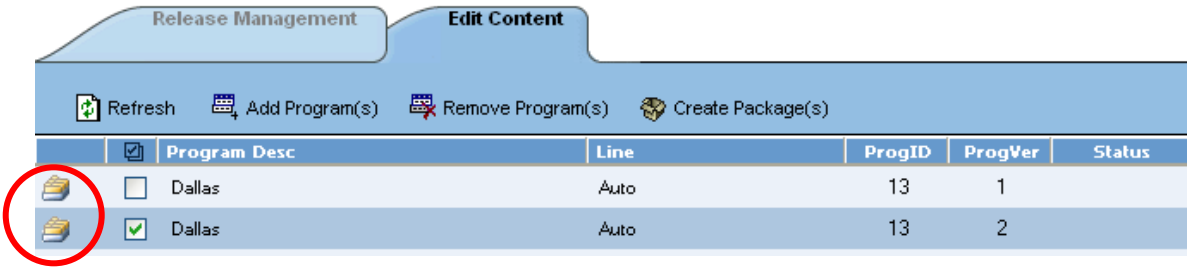


Figure 328 Packaged Releases

Right Click Menu

Unlocked programs will have a right click menu available on the Edit Content screen. If the program is locked, no menu options will be available.

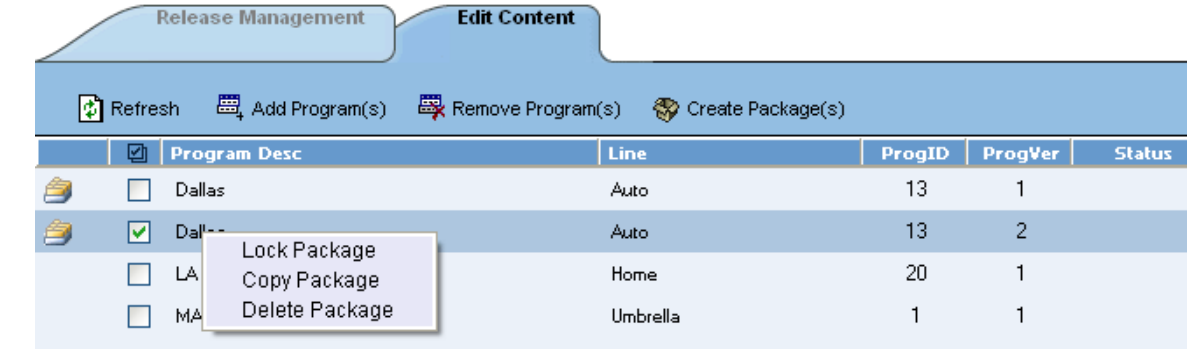


Figure 329 Edit Content Right Click Menu

- **Lock Package** – allows you to lock the package for the version. The locking applied here will not apply to the version under the subline. Only to the version in the release.
- **Copy Package** – allows you to copy the package into another release. This option will not be displayed on releases that have not been packaged.
- **Delete Package** – allows you to delete the package from the release. This option will not be displayed on releases that have not been packaged.

Programs locked from the Edit Content screen will only have the option to unlock. Programs locked by the release will not have any right click options.

Release Management Security

Release Management Security is activated or deactivated in the Administration area, Security option, Group Management tab. Only users who belong to an Administrator group will have the ability to turn the Release Management function on or shut it off. This is further detailed in Editing a Group's Rights.

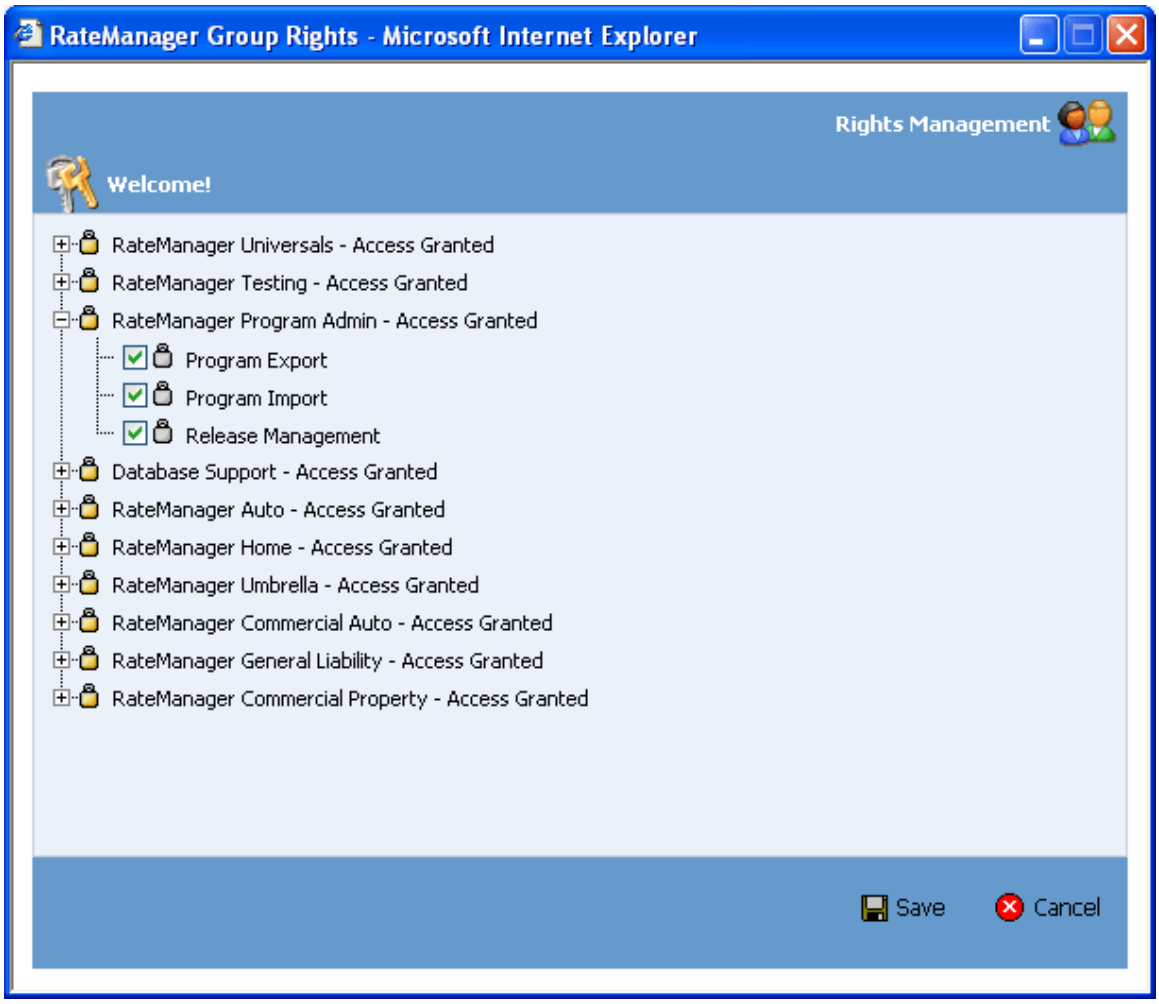


Figure 330 Release Manager Rights

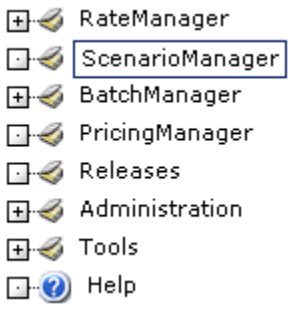
19

Introduction to ScenarioManager

ScenarioManager is the testing tool within RateManager. It allows you to test your rating program during development, without the need to load packages. ScenarioManager interfaces with the local SoftRater to rate one input XML file against the tables, rules and logic created within RateManager and outputs a report. If you have trouble rating a file, check your Internet Explorer settings.

To Navigate to ScenarioManager

1. Using the menu tree, select **ScenarioManager**.



2. This will open the **ScenarioManager screen**.

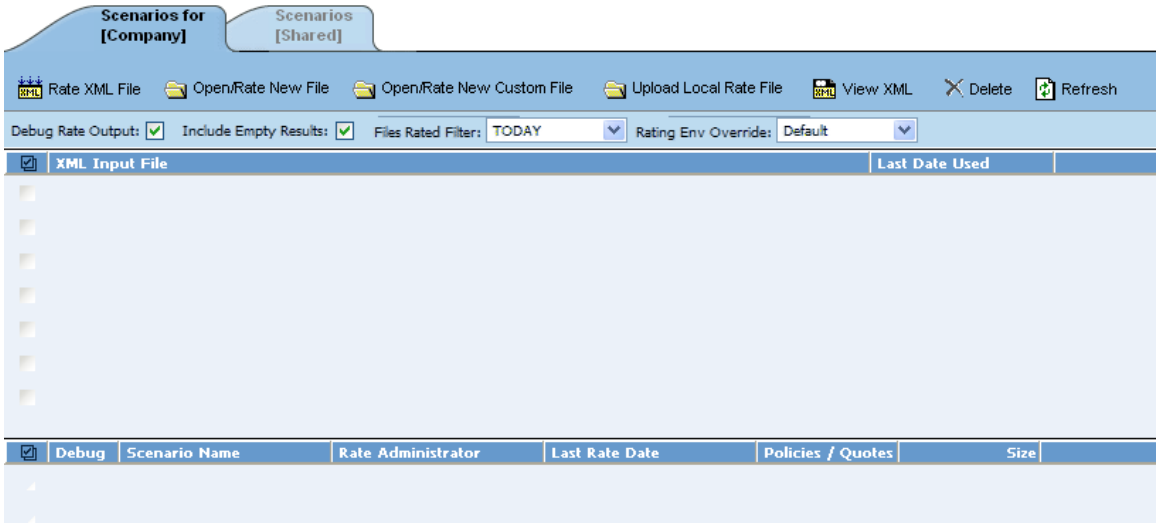


Figure 331 ScenarioManager Screen

Navigation Bar

Shared Scenarios Tab: Navigates to the listing of shared scenarios. These are scenarios that are shared by all users in the account. This tab works in the same way as the Scenarios for (Company) tab.

Rate XML 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 button. For more information, see Rating an Input File.

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

Open/Rate New File: Opens a browse window that allows you to select an input file to rate. This button is used when rating a file that is already in the Insbridge.XML format.

Open/Rate New Custom File: Opens window that allows you to select an input file. It also provides a place for the user to specify a mapping to use to transform the input file into the Insbridge.XML format. For more information on rating a file using a mapping, see the RateManager topic Rating a File with a Mapping.

Upload Local Rate File: Allows you to copy an XML input file, located on their machine, to ScenarioManager for rating.

Check your security settings if you receive errors when trying to rate a local file. See Internet Explorer Settings in Appendix B of the guide. If you are unable to change your security settings, you can upload the file to ScenarioManager first and then rate it.

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

Delete: Removes the selected file(s) from ScenarioManager.

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

Refresh: Refreshes the listing of rated files. This is useful when looking at shared scenarios.

Options

Debug Rate Output: If checked, ScenarioManager will rate the input file with a full debug report. The debug report provides comprehensive detail of every variable and algorithm that is used within the program, walking you through each step of every calculation.

Include Empty Results: Check this box if you would like to see all results. The default is for all results to be included. Unchecking this box will remove any empty results from the result report. Empty results are results with a null value. Zero value items will be included. Excluding empty results will produce a smaller report.

Files Rated Filter: Allows you to filter the rated files by when the files were produced.

Rating Environment: Allows you to select which environment to rate the XML Input File.

Input Files

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

Checkbox: 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: The name of the input file.

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

Result Files

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.

Checkbox: 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. This is useful when looking at shared scenarios.

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.

Rating an Input File

NOTE	If you want to rate a file using a mapping, see the RateManager topic Rating a File with a Mapping.

To Rate an Input File

1. Navigate to ScenarioManager.
2. Select the tab where the input file you want to rate is located:
   - **Scenarios for (Company)** – this tab contains scenarios that are visible to the current user only. (Company) equals your company's name.
   - **Scenarios (Shared)** – this tab contains scenarios that are shared by all users for this account.

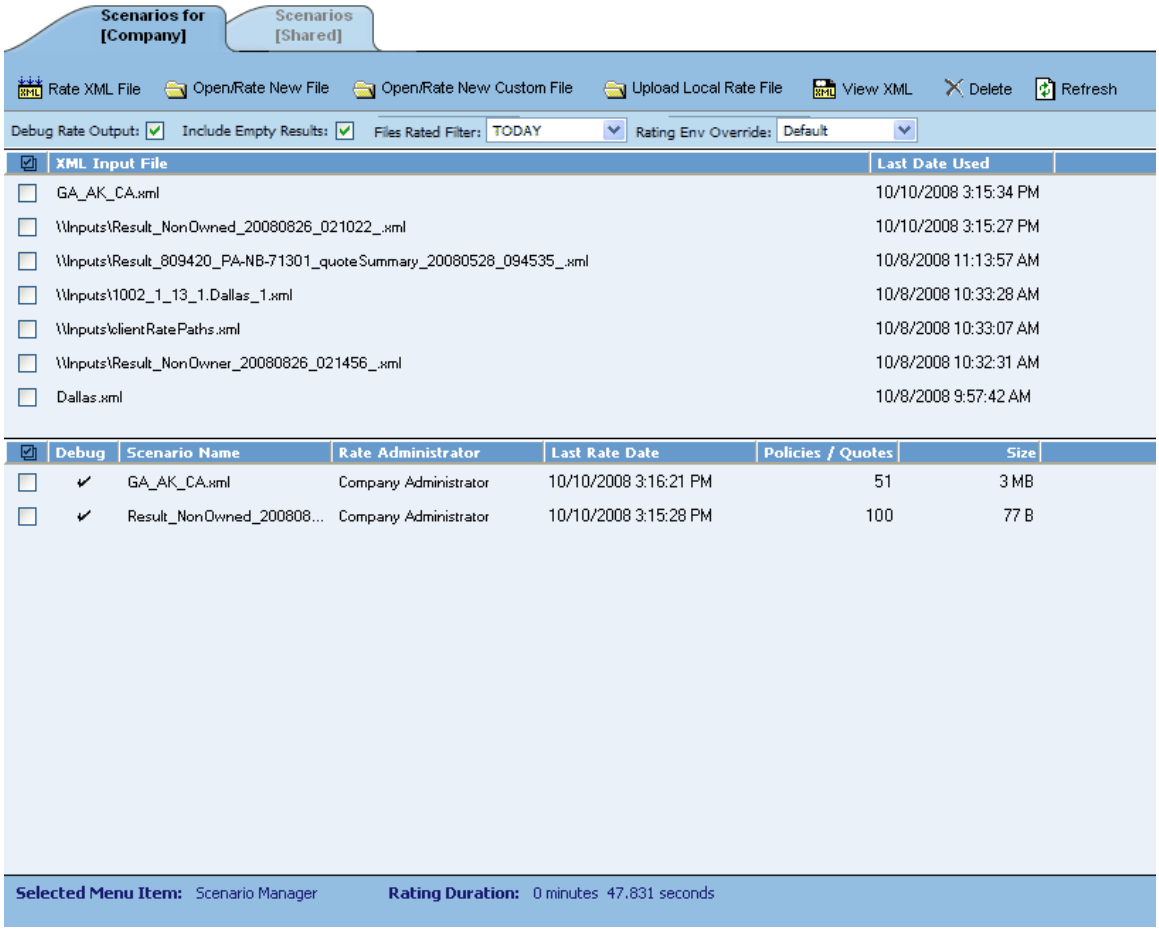


Figure 332 Rating an Input File

3. If you want to see a full debug report, check the box in front of **Debug Rate Output**. For a standard report, uncheck this box. If you want to exclude empty results, make sure the checkbox for **Included Empty Results** is unchecked.

4. If the file you want to rate is already listed in the input file listing, you can select it and click Rate XML File or double-click it. The Result file will be listed below. Double-click the result file to view the report. For more information, see Viewing the Rating Report.

Importing Files

If the file you want to rate is not in the Input File Listing, you will have to upload it. There are three ways to upload files into ScenarioManager:

- **Open/Rate New File**
- **Open/Rate New Custom Files**
- **Upload Local Rate File**

Open/Rate New File

If your file is stored locally and is already in the Insbridge.XML format, you can click the Open/Rate New File button. A browser window will open for you to select the file to rate.

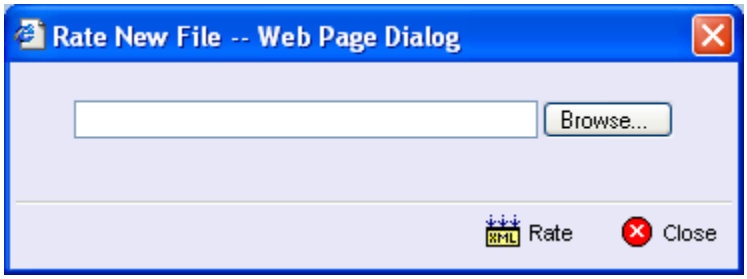


Figure 333 New Rate File Browse Screen

1. If you know the path to the file you want to rate, type it in the box, otherwise, click the Browse… button to find a file to rate. When finished, click Rate.

2. Your file will be rated and the result file will show in the result file listing. Double-click the result file to view the report. For more information, see Viewing the Rating Report.

Open/Rate New Custom File

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

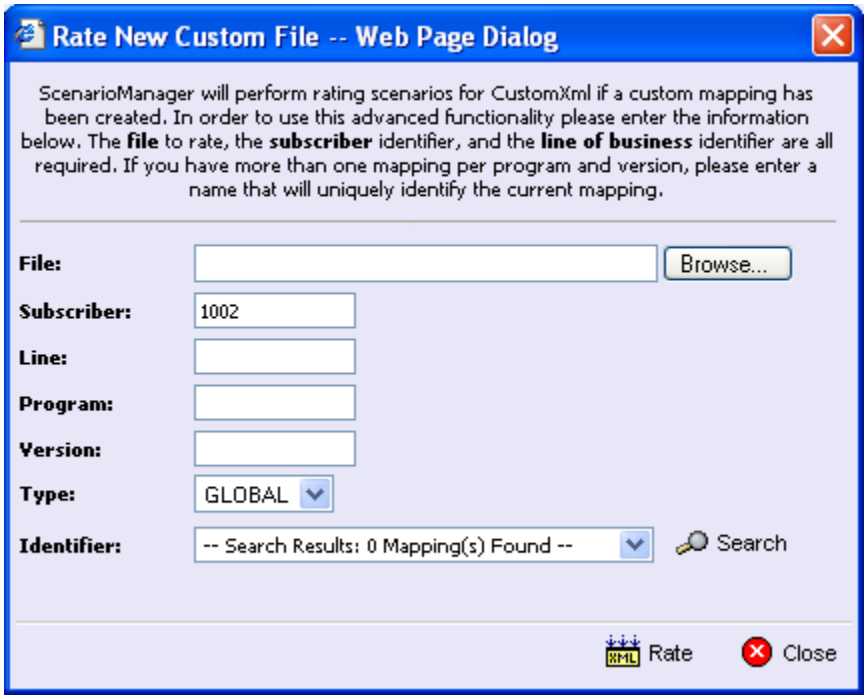


Figure 334 New Rate Custom File Dialogue Box

1. If you know the path to the **File** you want to rate, type it in the box, otherwise, click Browse… to find a file to rate.
2. Enter in the **Line**, **Program** and **Version** numbers.
3. Select the **Type** from the drop down menu. There are three options; Global, Local and Custom.
4. Select the **Identifier** from the drop down menu. The options will be filled in after you select the File at the top of the popup.
5. When finished, click Rate.
6. Your file will be rated and the result file will show in the result file listing. Double-click the result file to view the report. For more information, see Viewing the Rating Report.

Upload Local Rate File

If you have an XML input file stored locally, you can click the Upload Local Rate File button to upload the file into ScenarioManager for rating. A browser box will open for you to select the file to rate.

Figure 335 Uploading a File to Rate

1. Enter the **name of the file**.
2. If you know the path to the file you want to rate, type it in the box, otherwise, click the Browse… button to find a file to rate.
3. Select the type of XML from the drop down menu, either Insbridge or Custom.
4. When finished, click Save.
5. Your file will be saved to ScenarioManager. To rate the file, either double-click the file or highlight and click Rate. Your file will be rated and the result file will show in the result file listing. Double-click the result file to view the report. For more information, see Viewing the Rating Report.

NOTE	The first time you rate a custom XML file, a Rate New Custom File popup will be displayed. Enter in the Line, Program and Version Number. Select the type of file and enter in any mapping information.

Errors when Rating a File

You might receive an error when they try to rate a file.

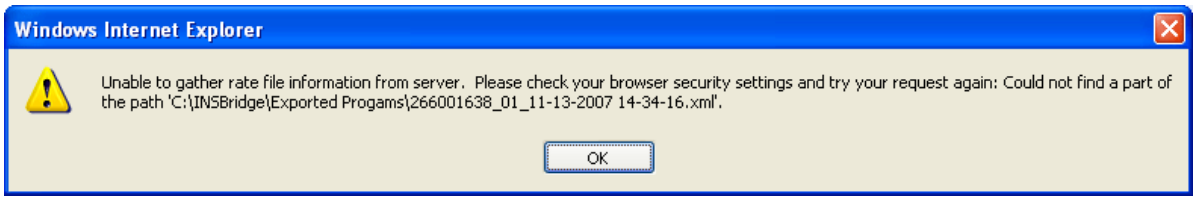


Figure 336 Error Message for Rate File Search

There are three possible causes of this error:

1. The file is located on the user's machine (or a mapped network drive) and the security settings prevent scripting of the ActiveX control that allows ScenarioManager to get the file from the user's machine (or mapped network drive). The user either needs to adjust their security settings or rate the file from a network share, i.e. \\server\folder\file.xml. For more information, see Internet Explorer Settings and How Security Levels Affect RateManager.

2. The user clicked **No** when asked if they wanted to allow the ActiveX control to run. To get prompted again, the user must log out of RateManager and log back in.

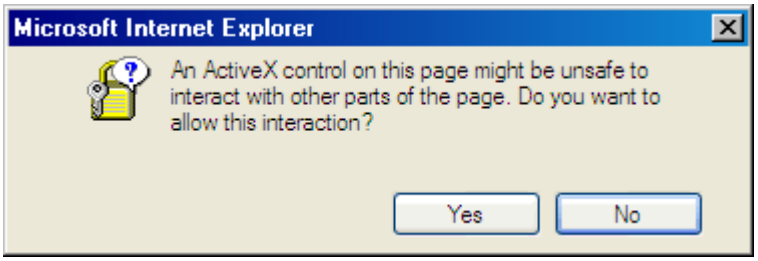


Figure 337 Active X Error Message

3. The file does not exist at the location specified by the user. Check to be sure the file actually exists.

NOTE	If a file is moved to a different location, the user 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 to re-rate.

Right Click Menu Options

Both the Company and the Shared tab have the same right click menu options. The Input File will have five options and the Result File will have three.

To view the Input File menu, highlight an input file and right click.

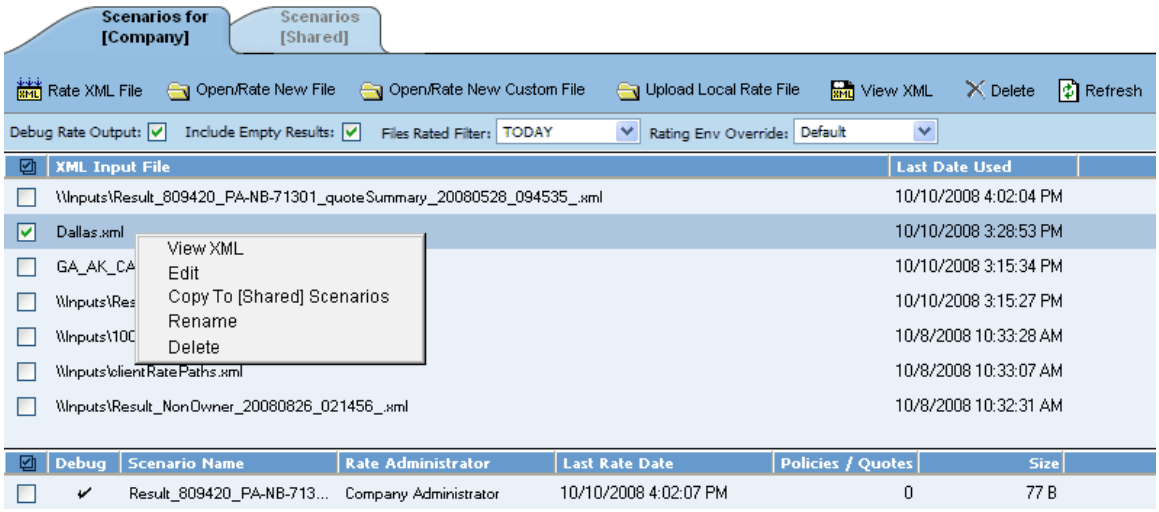


Figure 338 Scenario Input File Right Click Menu

- **View XML** – allows you to view the XML in a separate screen. This functions like the View XML button on the top bar menu.
- **Edit** – brings up the file in Test Case Editor. The default view is XML however you can change to grid view if needed. The file can be edited and saved again.
- **Copy to (Shared) Scenarios** – makes a copy of the file onto the shared tab. If you are on the Shared tab, you will be able to make a copy to the company tab.
- **Rename** – allows you to rename the input file. A separate screen will be displayed. Enter in the New Name and click Save.
- **Delete** – deletes the file. A warning message will be displayed prior to the file being deleted.

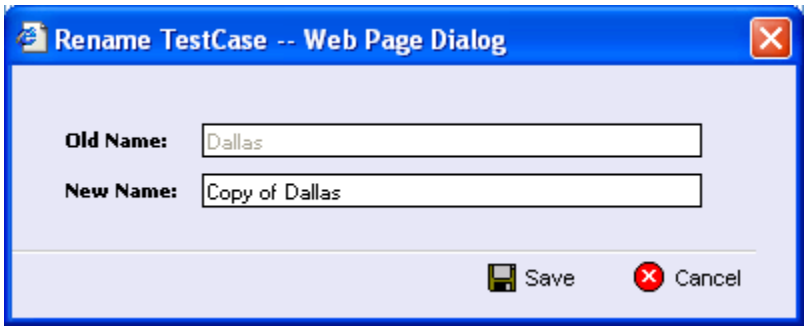


Figure 339 Renaming an Input File

To view the Result File menu, highlight a result file and right click.

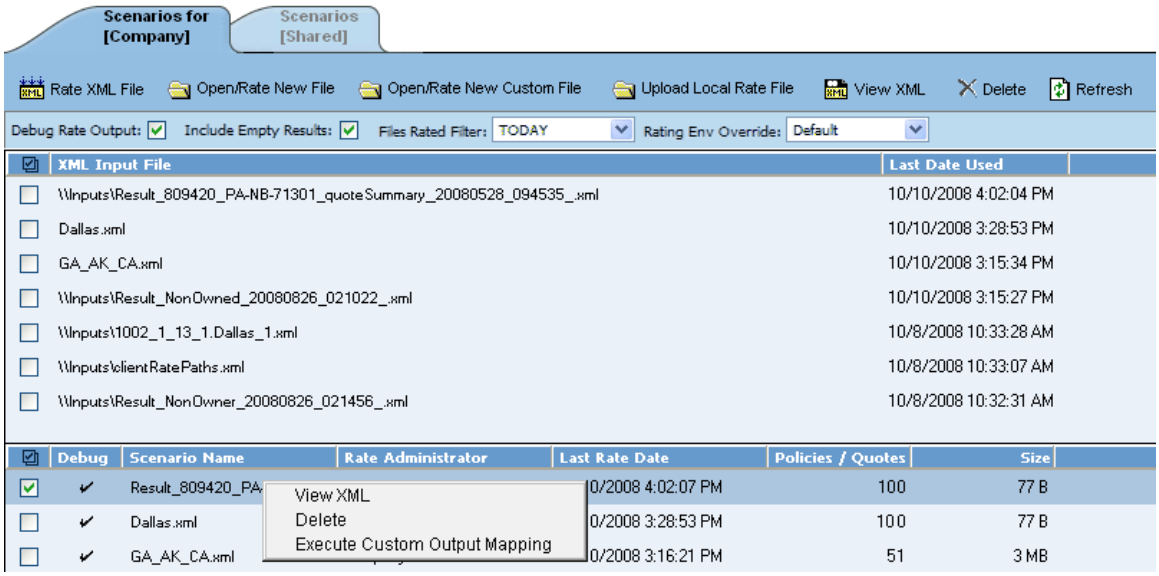
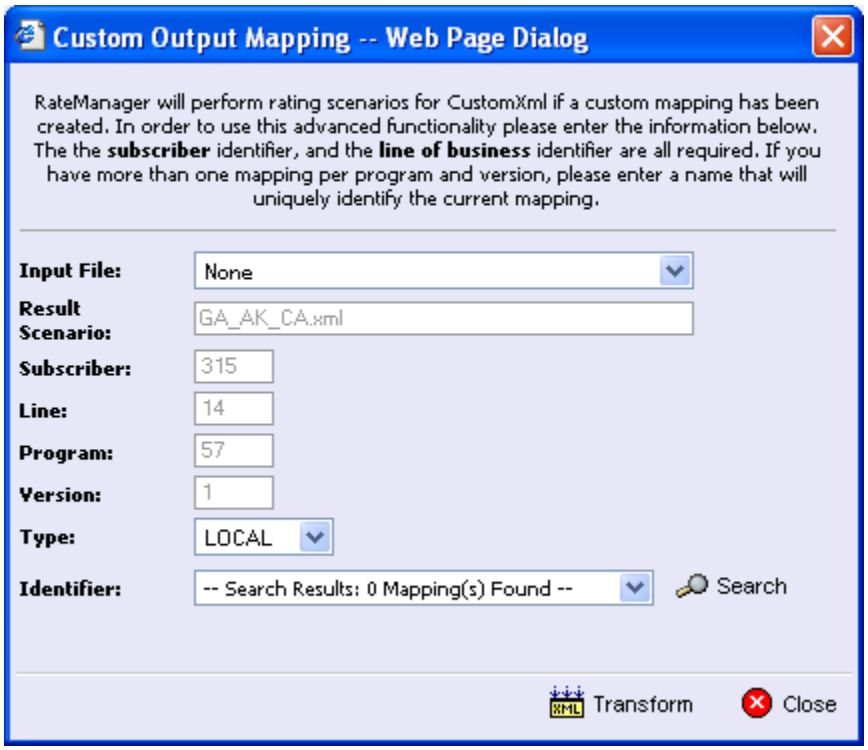


Figure 340 Result File Right Click Menu

- **View XML** – allows you to view the XML in a separate screen. This functions like the View XML button on the top bar menu.
- **Delete** – deletes the file. A warning message will be displayed prior to the file being deleted.
- **Execute Custom Output Mapping** – this will pull up the Custom Output Mapping dialogue box used for this result file.



1. The Subscriber, Line, Program and Version cannot be changed.
2. You can select a different **Input File** from the drop down menu.
3. A different **Type** can be selected, if needed.
4. You can select another **Identifier** from the drop down menu. The options will be filled in after you select the Input File at the top of the popup.
5. Click Transform. The changes will be applied and a View XML screen will be displayed.

ScenarioManager Reports

Once a file has been rated, you will have two options for viewing the results.

- **Standard Rating Summary Report** – shows the result file using a specialized style sheet that presents the results in an easy-to-read and understand format.
- **Actual XML** – shows the actual result XML.

Viewing the Rating Report

1. To view a Rating Report, double-click the result file in ScenarioManager.

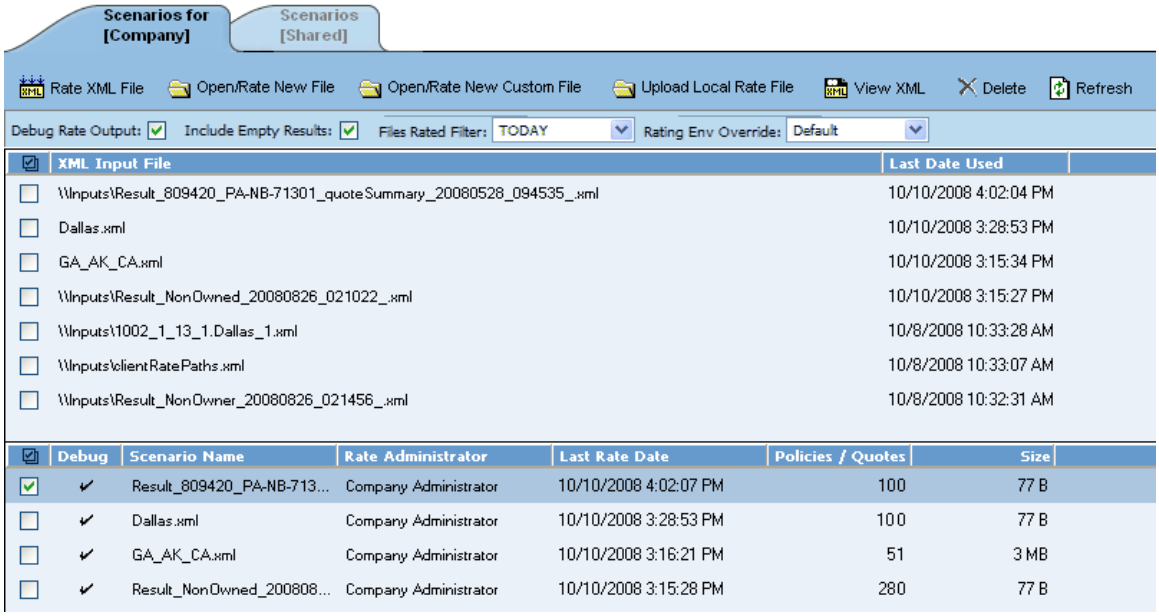
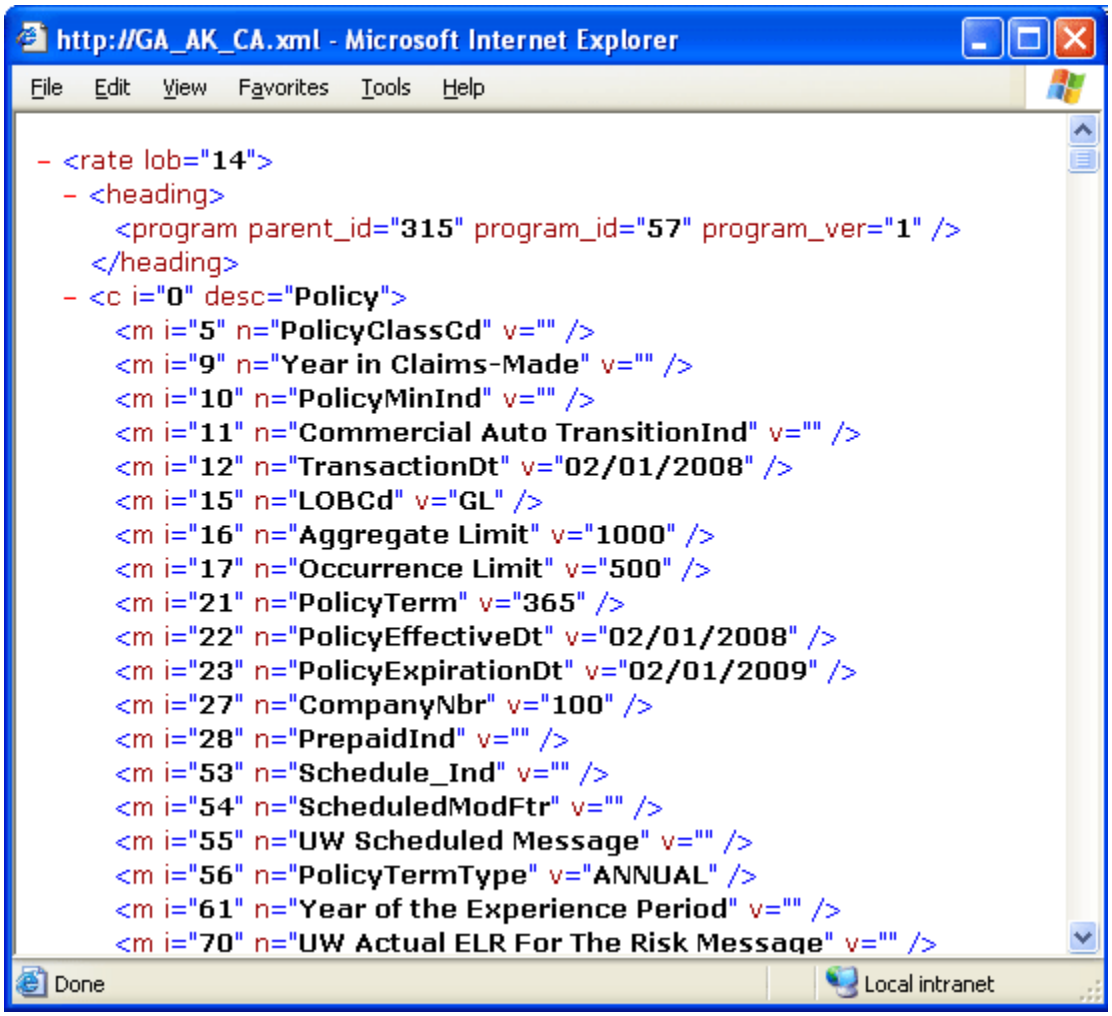


Figure 341 Viewing Reports in ScenarioManager

2. The Rating Report will open in a separate window.

Viewing the Actual XML

1. Select the result file from the result file listing.
2. Click View XML. The XML file will open in a separate window.
3. To save the result XML file, select **File➤Save As** and select a destination for the result file.



Standard Rating Summary Report

The standard Rating Summary report shows information about the result file and the elements (results, variables and inputs) that were selected for output (see Result Mapping). The report allows you select the program, if there are multiple programs, select the view format and search for specific items. An example Rating Summary report is shown below.

The Debug tab will be visible even if the debug option was not selected.

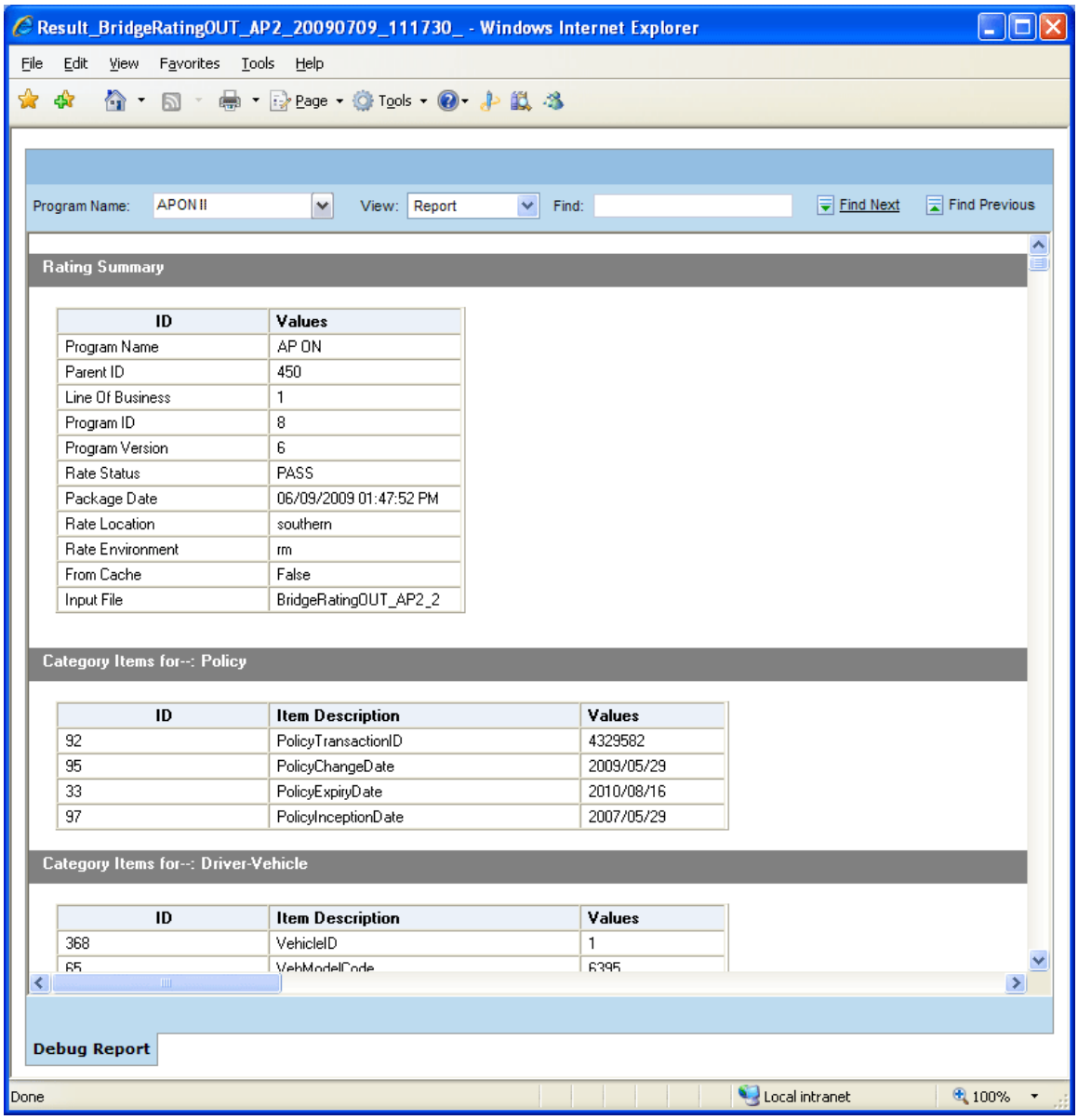


Figure 342 Standard Rating Summary Report

Navigation Bar

Program Name: Displays the name of the program being rated. The drop down menu will be available when you are rating multiple programs using Program to Program. See Universal Programs for more information.

View: The debug tab will automatically show results in a report view. You may change this view to show the raw XML output.

Find: Allows you to search through the debug report for a specific alpha/numeric character string.

Find Next: If a search is performed, Find Next will navigate to the next place in the debug report that a match was found.

Find Previous: If a search is performed, Find Previous will navigate to the previous place in the debug report that a match was found.

Debug reports also can be displayed as XML.

Result File Information

Program Name: Name of the program rated. If more than one program was rated, a drop down will be displayed where you can select the report you want to view.

Parent ID: Company ID number.

Line of Business: The Insbridge assigned ID for the line of business the rated package is for.

Program ID: XML ID of the program rated.

Program Version: Version of the program.

Rate Status: The results of the rating request.

- **PASS:** Indicates that all algorithms executed correctly and no Set Underwriting to Fail step was encountered.
- **Stop Requested:** Indicates that a Set Underwriting to Fail step was encountered.

Package Date: Time stamp of when the rated package was created.

Rate Location: Database location for the program.

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

From Cache: True or False.

Input File: Displays the input file that was used in the report.

Results

Shows the selected results (see Result Mapping), sorted by category, in an easy to read table format. Elements that have the word **Premium** in the Item Description are bolded and shown at the top for easier reading.

- **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.

Debug Rating Report

The Debug Rating report shows the same information as the standard Rating Summary report, but it also includes detailed information about every algorithm, calculated variable and mapped variable executed at the end of the report.

How a Mapped Variable is Shown on the Debug Rating Report

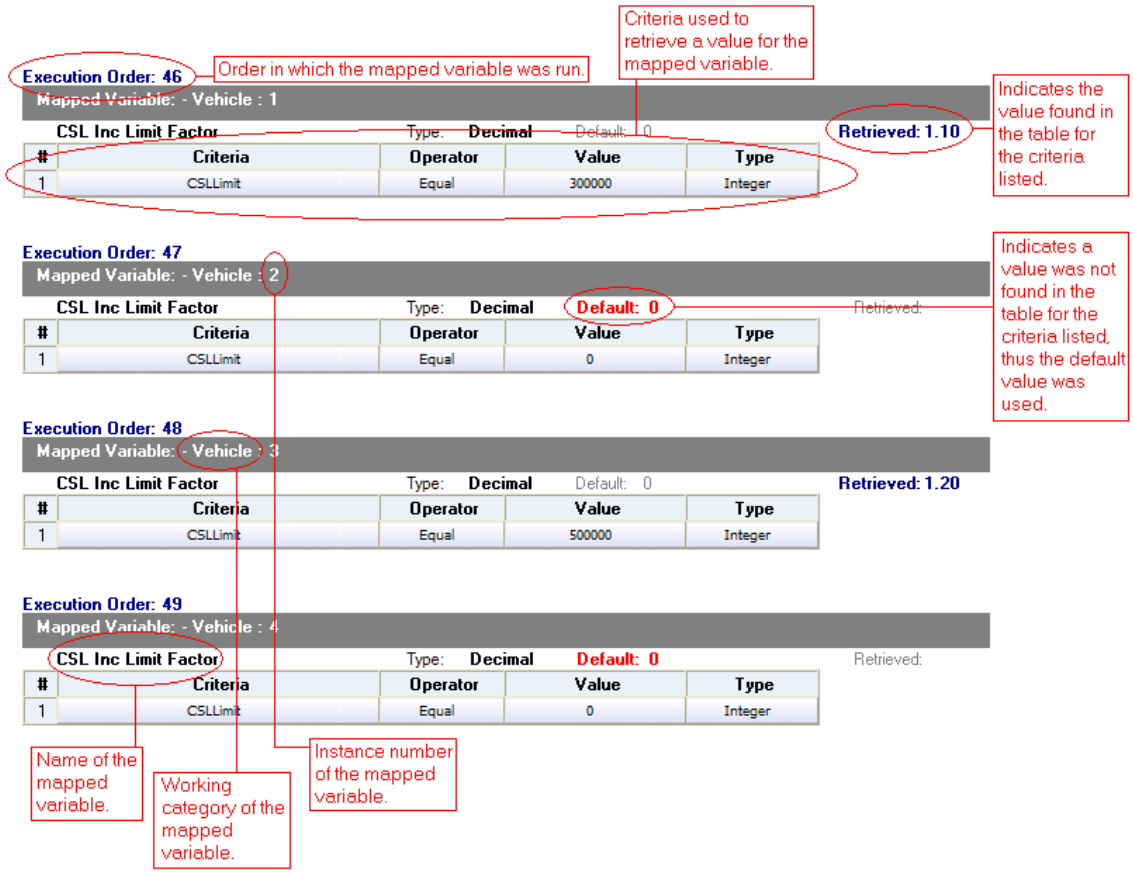


Figure 343 Debug Rating Report with Mapped Variable Highlighted

How an Algorithm / Calculated Variable is shown on the Debug Rating Report

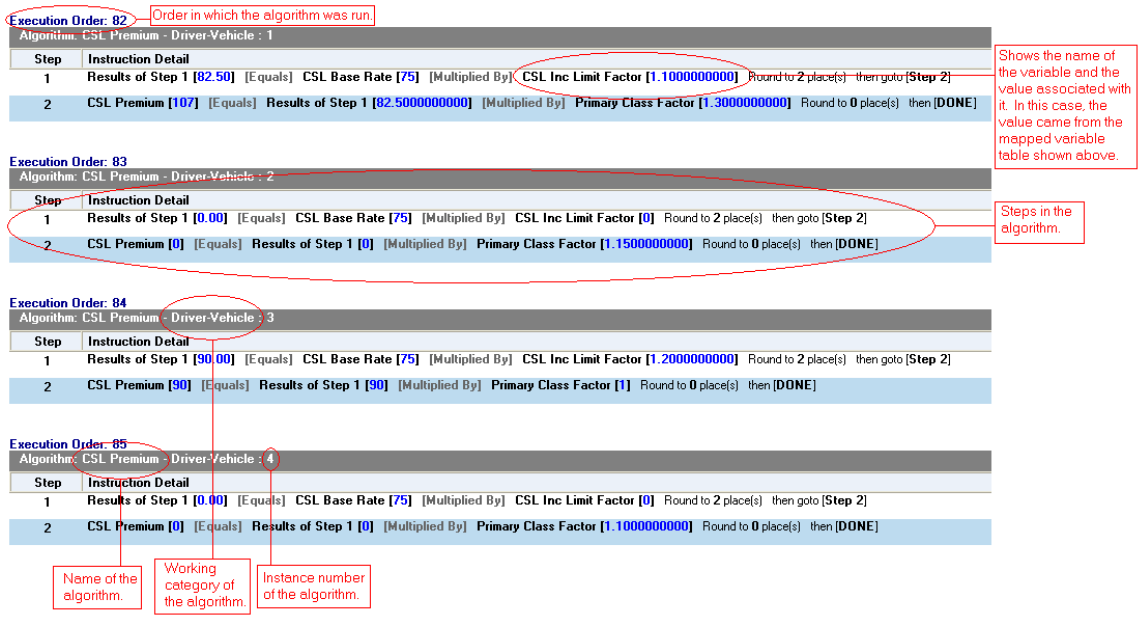
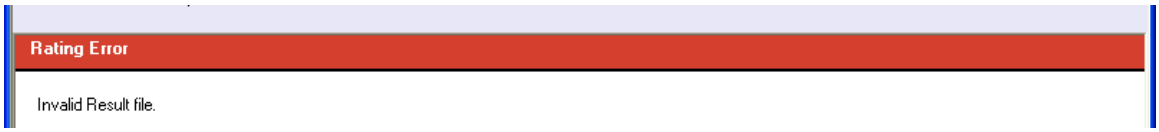


Figure 344 Debug Rating Report With Algorithm/Calculated Variable Highlighted

Report Errors

In the event that you have an error, a red banner will be displayed with the reason for the failure listed underneath.



20

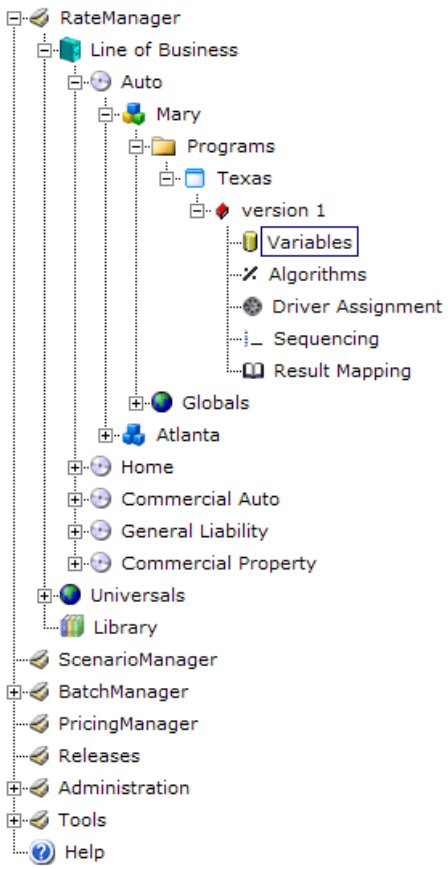
Introduction to Test Case Editor

The Test Case Editor gives you the ability to create, execute, debug and maintain test scenarios within the RateManager application. Testing and debugging of a program can either be done within the program itself, or using ScenarioManager.

Test files are created and maintained within the Test Case Editor using either the XML view or the grid view with text box fields for input values. Additionally, new and existing test files created outside of RateManager are accessible using the test case editor, or users can paste and rate their own XML files.

Test Case Editor Screen

1. From the menu tree, select the subline, folder(s), program and version that have the variables you want to test and then click **Variables**.



2. This will show the **Variable Listing Screen**.

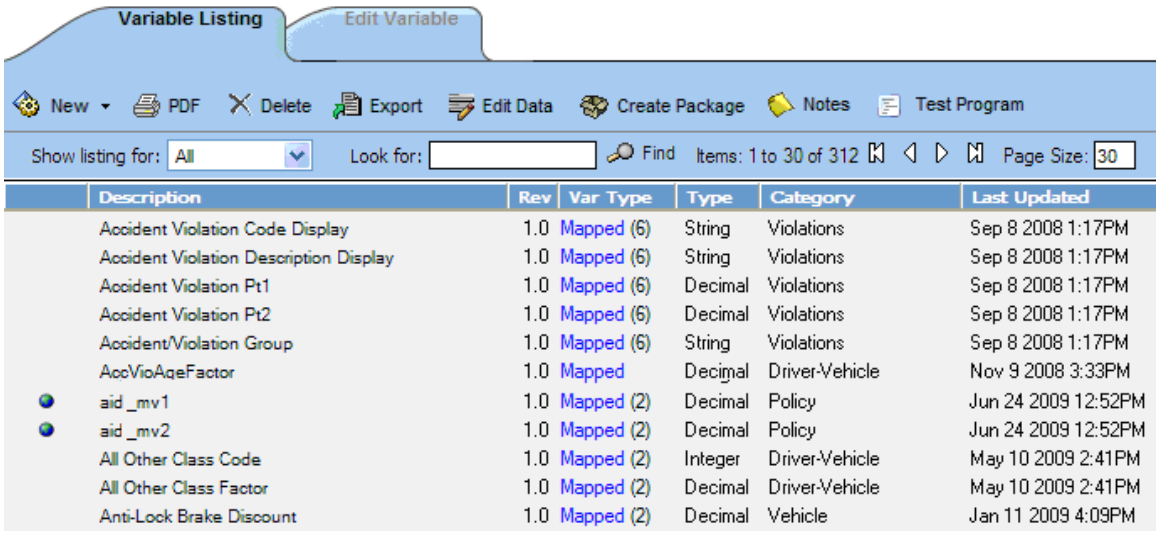


Figure 345 Variable Listing Screen

3. From the Variable Listing Screen, click

.

4. This will open the **Test Case Editor Screen**.

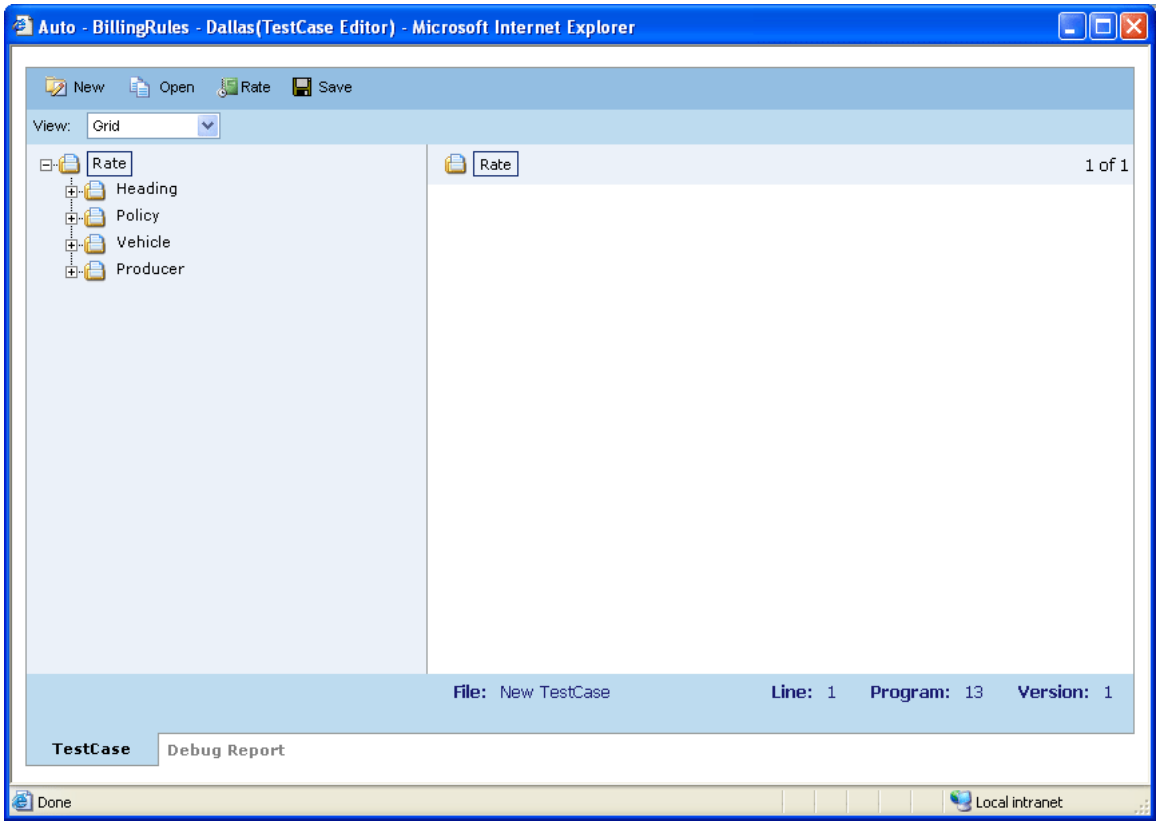


Figure 346 Test Case Editor

Navigation Bar

New: Starts the process of creating a new test case. See Creating a New Test Case for more information.

Open: Allows you to browse for existing test cases.

Rate: Rates the current test case.

Save: Saves the current test case.

View: Allows the user to switch between XML view and Grid view. When opening a new test case, Grid view is always the default.

The Test Case Editor has two tabs at the bottom of the window -Test Case and Debug Report. By default, Test Case Editor will open in the Test Case tab.

Adding, Deleting and Copying Categories

The Category listing on the right hand side has a right click menu that allows you to:

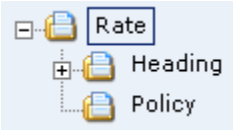
- **Add** – Adds another category. Use this when you need to account for multiple entries in the same category. For example, you may need to add another vehicle category to accommodate two cars in the rating.
- **Copy** – Use this when you want to copy a category and the contents. For example, you have two vehicles; there are only two differences between them. You can use the copy feature to copy the category and then change the differences.
- **Delete** – Use this to remove a category that is no longer needed.

The Heading and the Policy category will not have a right click menu.

NOTE	You also can create a test case by right clicking the version on the left hand side of the screen. This will pull up the test case editor popup. This feature can be used at any time and does not require you to leave the screen you are currently working in.

Grid View

In Grid view, the left hand window of the Test Case Grid view shows the categories and category structure created for the program.



When a specific category is clicked, the right hand window shows the inputs available for the chosen category.

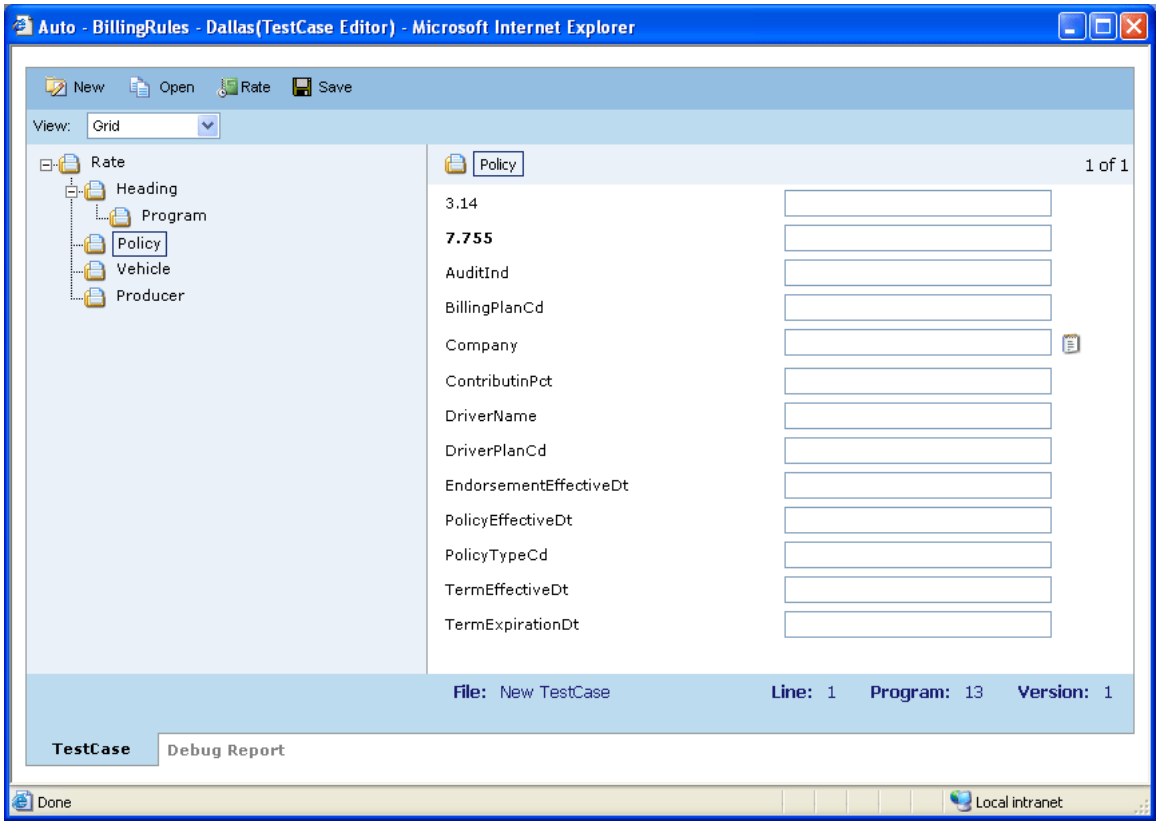


Figure 347 Grid View for Test Case Editor

See Creating a New Test Case in Grid View for more information on creating a test case in Grid view.

XML View

In XML view, an editable XML file is displayed. You can edit this file by typing values into the “V” attributes of each available input.

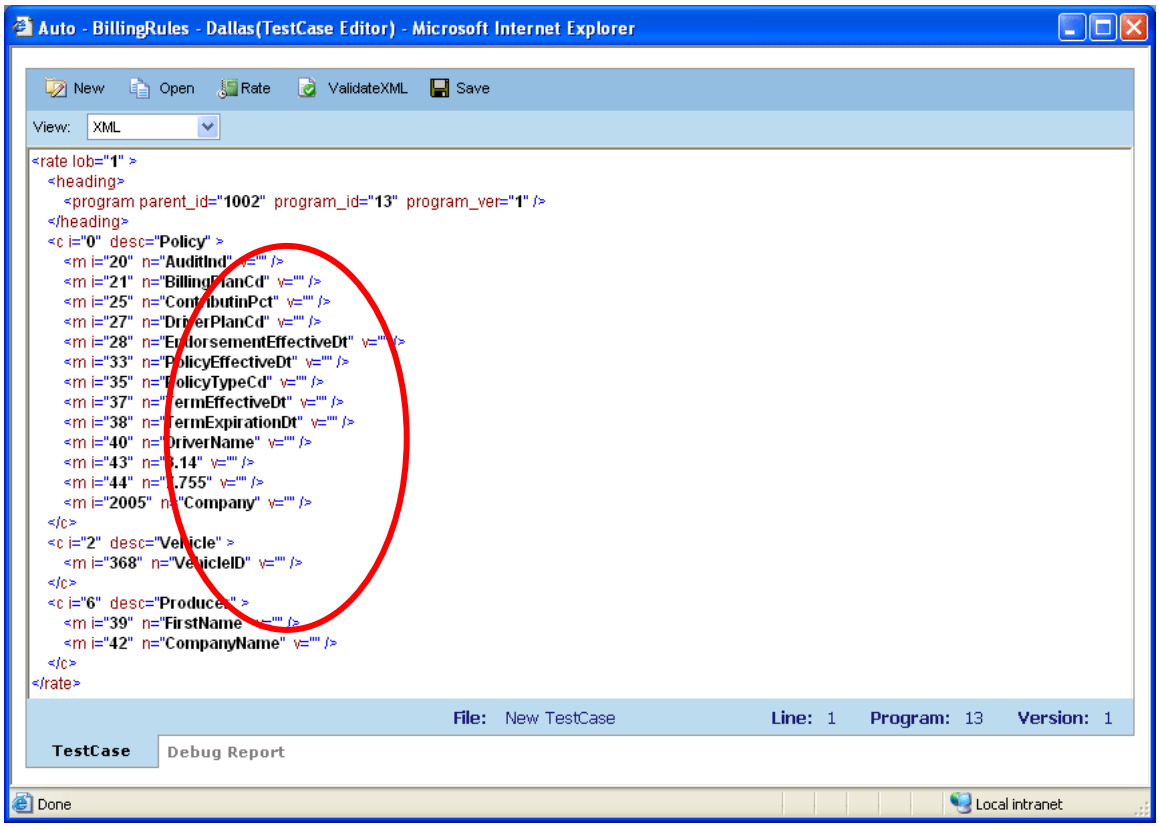


Figure 348 XML View for Test Case Editor

See Creating a New Test Case in XML View for more information on creating a test case in XML view.

Creating a New Test Case in Grid View

1. Navigate to the Test Case Editor screen for the desired program.
2. If not already displayed, choose Grid view from the drop down list.

3. In the left hand window, click on the category name where you want to enter data. The right hand window will display the applicable inputs for the chosen category.

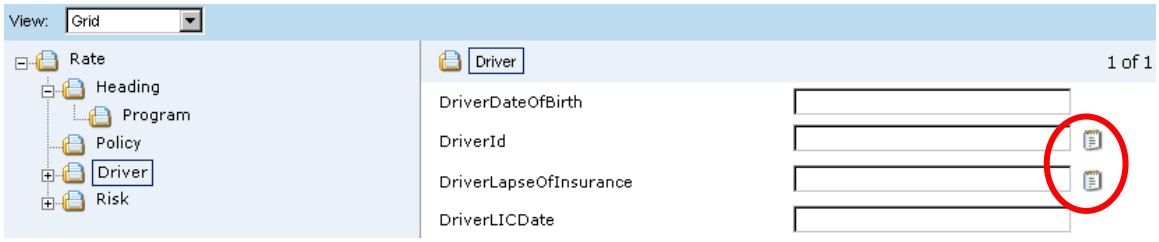
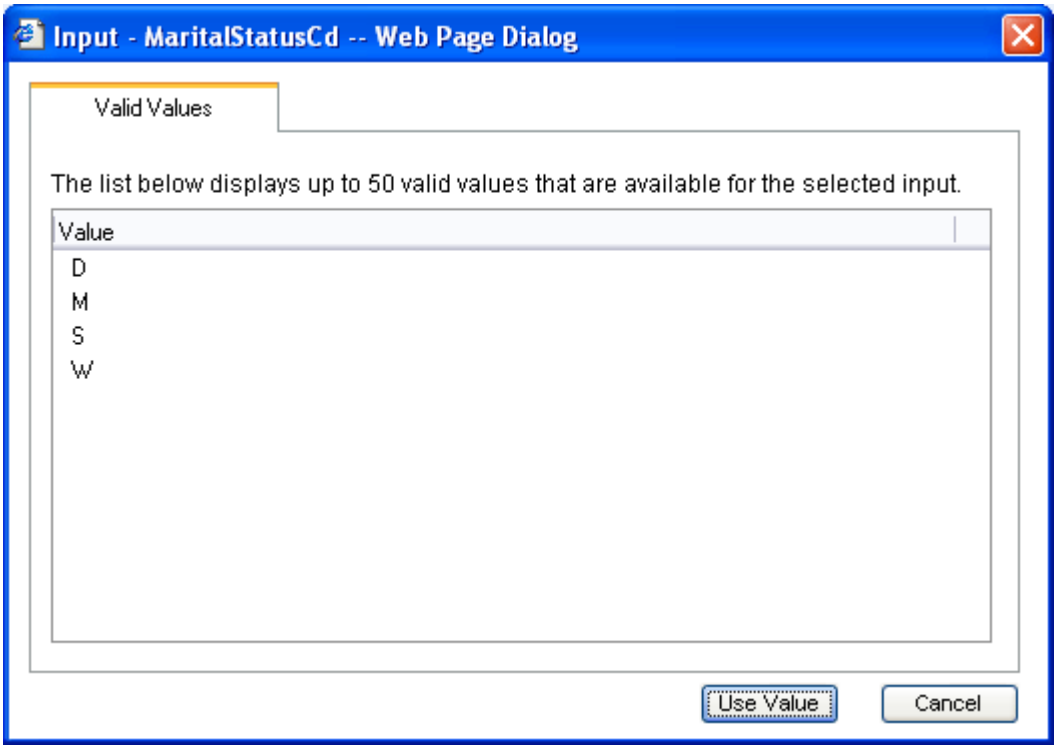


Figure 349 Inputs Displayed in Test Case Editor

4. In the right hand window, you will have two options:

    a. For non-string input types, you can enter in a valid value.
    b. For string input types, you can click the icon at the end of the field. This will bring up a popup menu.



    c. Select the option you want. Click the **Use Value** button. This will close the popup and return you to the test case editor. Your selection will be filled in the field.

       You also can enter in a value for string inputs. You may not be required to use the notepad icon.

5. Repeat Steps 3 and 4 for each category and input for the test case.

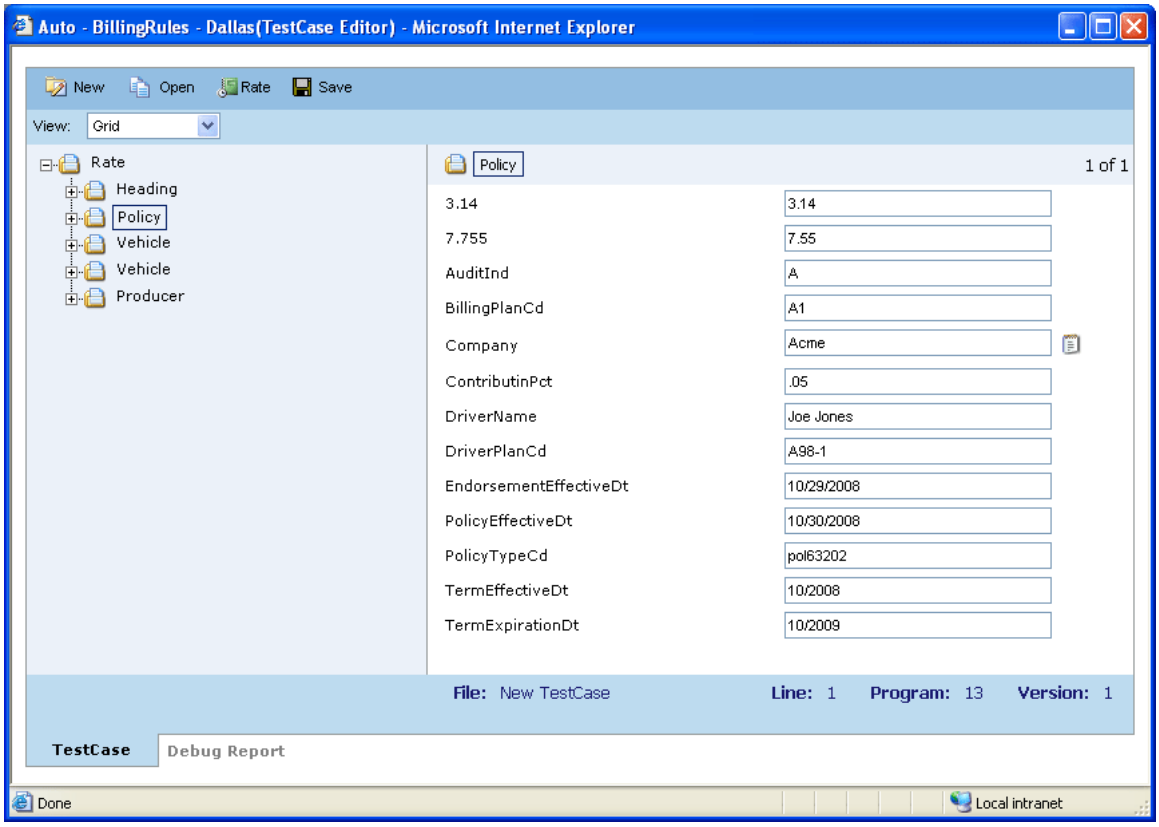


Figure 350 Entering Inputs in Test Case Editor

6. Click Save to save the test case. The save screen allows you to specify a unique name for the test case. Unique names allow you create multiple versions. You can create as many versions as you need. Versions will be listed in the space underneath.

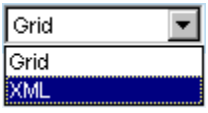
7. Click Rate to rate the test case.

8. The Test Case Editor will switch to the Debug Report tab once the test case has finished rating. See Using the Debug Tab for more information.

Creating a New Test Case in XML View

1. Navigate to the Test Case Editor screen for the desired program.

2. If not already displayed, choose XML view from the drop down list.



3. An XML editing window will display the XML file format for the program. You may manually edit this XML file to create a test case.

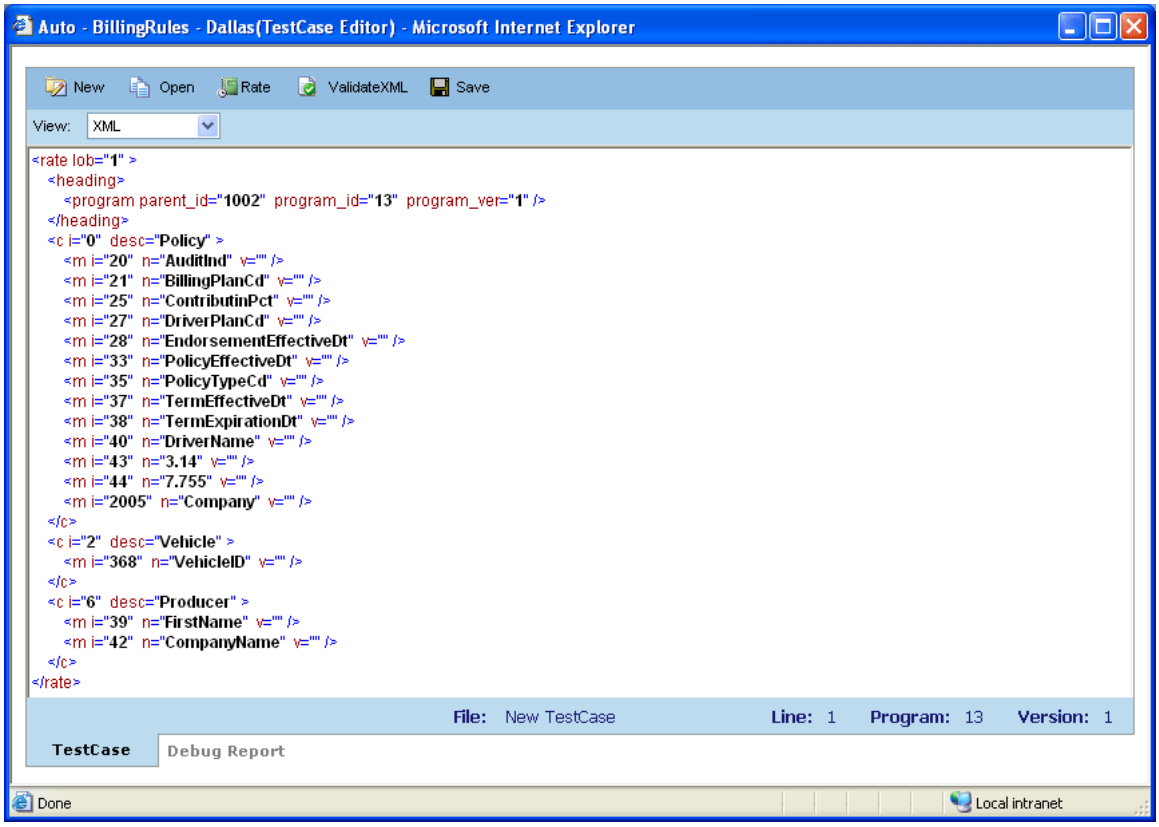


Figure 351 Editing XML in Test Case Editor

4. Click to validate the XML before saving the test case.

5. Click to save the test case. The save screen allows you to specify a unique name for the test case. Unique names allow you create multiple versions. You can create as many versions as you need. Versions will be listed in the space underneath.

6. Click to rate the test case.

7. The Test Case Editor will switch to the Debug Report tab once the test case has finished rating. See Using the Debug Tab for more information.

Using the Debug Tab

You will have the ability to view debug reports from Test Case Editor without having to go to ScenarioManager. Rating a test case will switch you to the Debug Report tab.

Rating Summary information will be at the top, followed by detailed Category Information. The execution order is listed next. This section details the instructions used to execute the step.

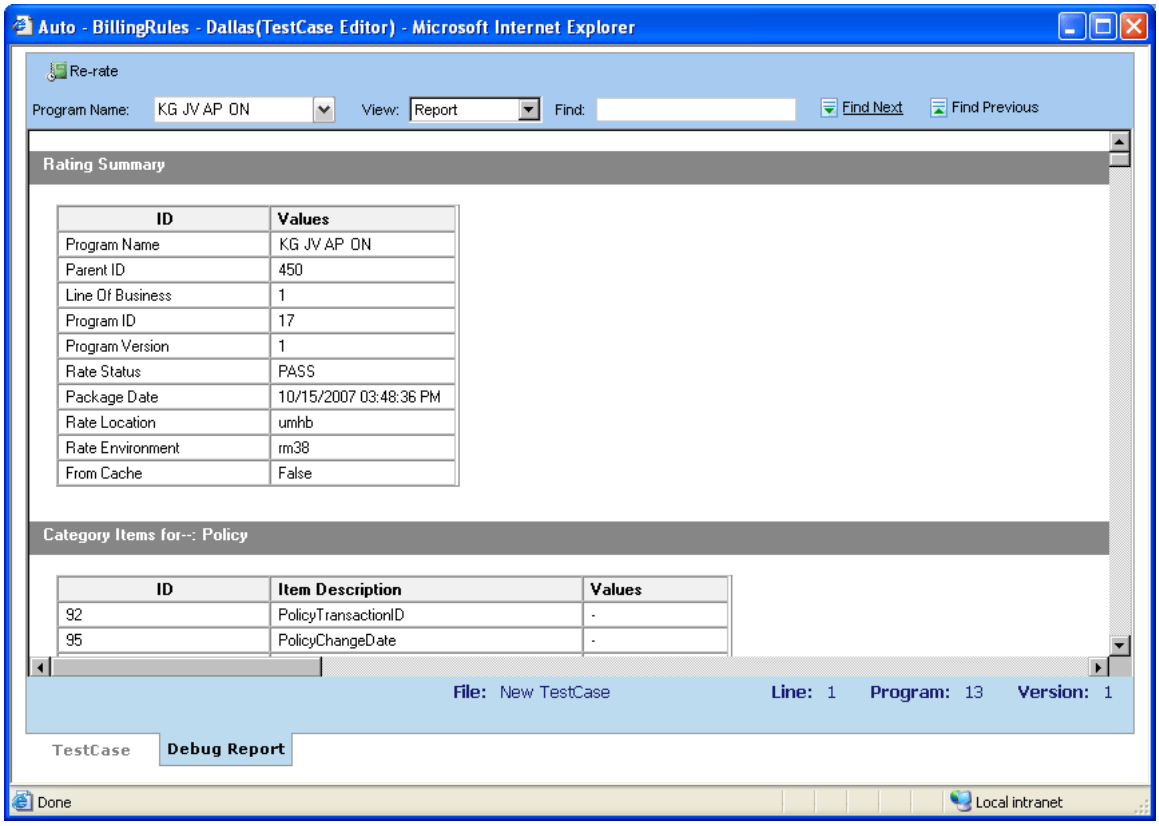


Figure 352 View Debug Reports

Navigation Bar

Re-rate: The re-rate button will rate the selected test case and replace any pre-existing debug report with the newly rated one.

Program Name: Displays the name of the program being rated. The drop down menu will be available when you are rating multiple programs using Program to Program. See Universal Programs for more information.

View: The debug tab will automatically show results in a report view. You may change this view to show the raw XML output.

Find: Allows you to search through the debug report for a specific alpha/numeric character string.

Find Next: If a search is performed, Find Next will navigate to the next place in the debug report that a match was found.

Find Previous: If a search is performed, Find Previous will navigate to the previous place in the debug report that a match was found.

Debug reports also can be displayed as XML.

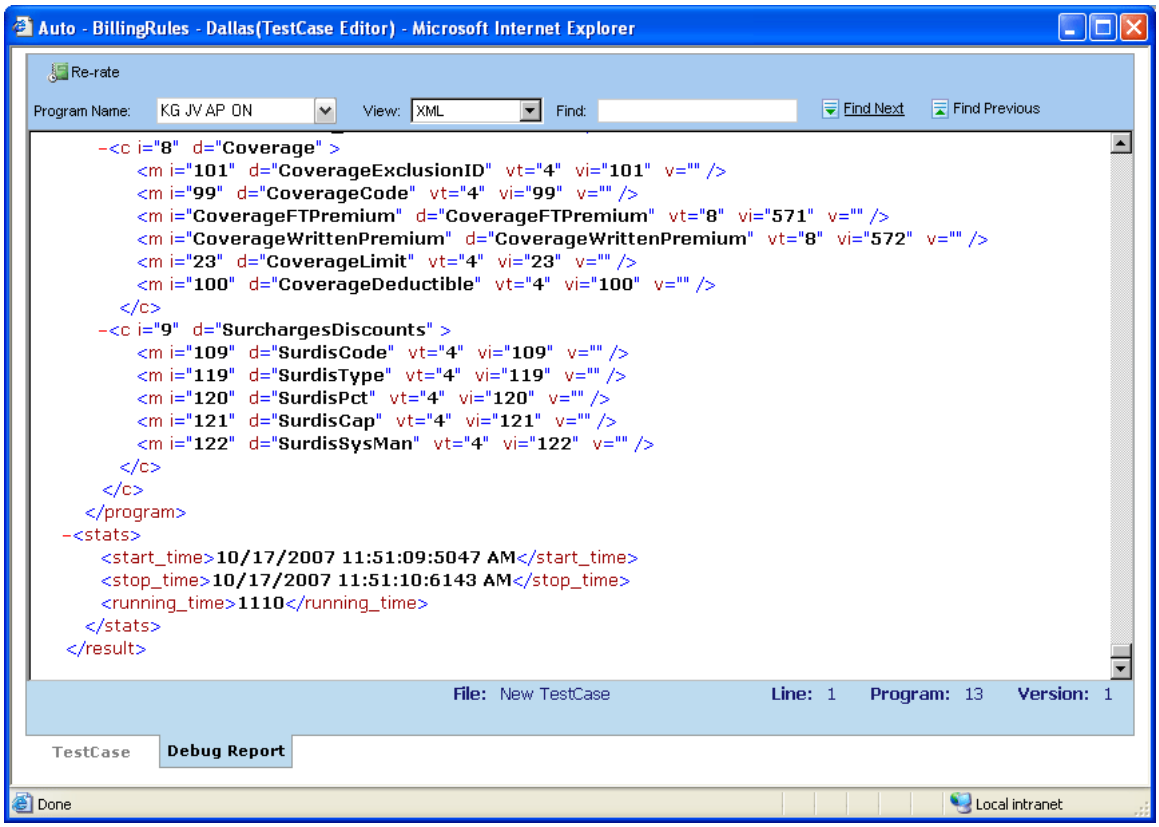


Figure 353 View Debug Reports XML

See Debug Rating Report for more information on using the debug report.

Opening an Existing Test Case

Test Case files saved within Test Case Editor are saved to server files. You also can save test case files to your local files. Clicking the Open button will bring up a dialogue box.

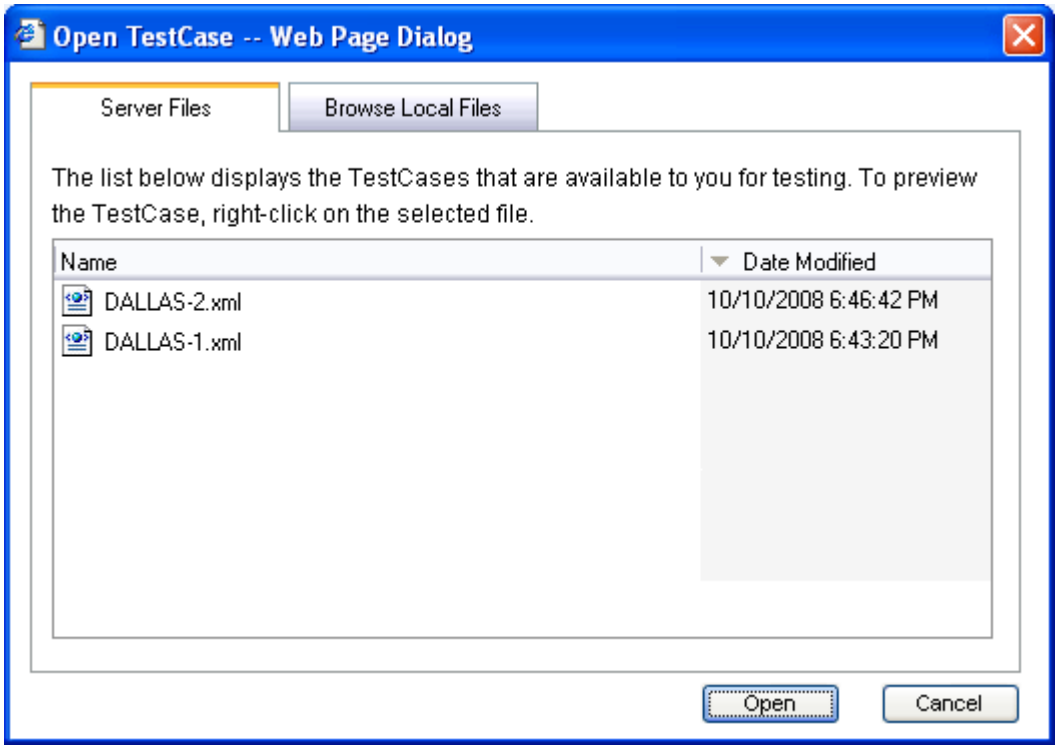


Figure 354 Open Test Cases

There are two tabs:

- **Server Files** – These are the test cases you saved inside Test Case Editor.
- **Browse Local Files** – These are the files saved outside of Test Case Editor.

Select the file you want to open. You can click the **Open** button to immediately open the file. You also can right click the file. This will bring up three options:

- **Open** – Will open the file in Test Case Editor.
- **Preview XML** – Will display the XML in a separate screen.
- **Delete** – This will delete the file.

If this is not the screen you wanted, click Cancel to close the dialogue box and return to Test Case Editor.

21

Administration

Users with Administration rights will be able to access all options found in the Administration section. The Administration section allows administrators to manage settings, check logs and manage security for users and groups.

Non-administrators will only have the option to change their password.

Administration has four options:

- Settings
- Logs
- Security
- Change Password

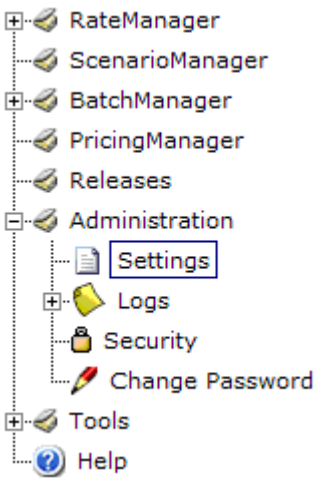
Settings

Administrators can edit web config settings at any time from the Settings option. Change will take place immediately.

From the Settings screen, you can set pathways, define servers, backup shares, set preferences, set batch threads, establish minimum ID lengths, display of override date-mask values for Importing Data for Mapped Variables, allow users to edit data types within the application, and set the time for inactive session timeout.

To Change Settings

1. From the menu tree, select Administration and then click **Settings**.



2. This will open the **Settings** window.

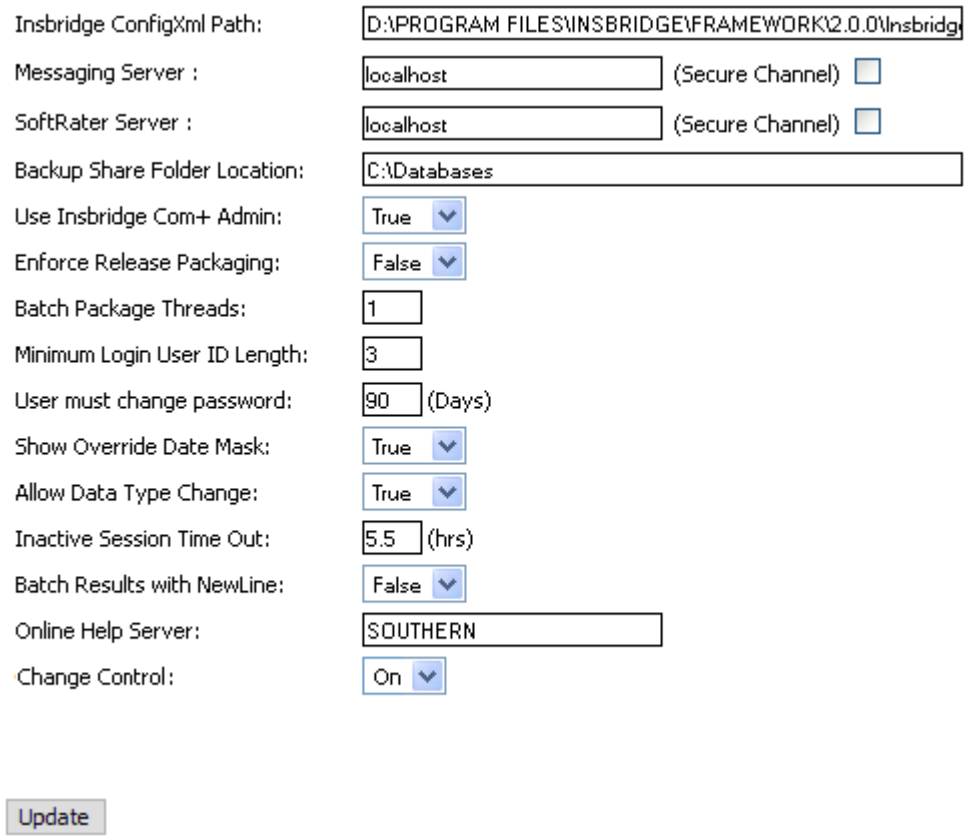


Figure 355 RateManager Settings

3. Make any necessary changes.
4. When you are finished, click Update to update your settings.

Setting Options

Insbridge ConfigXml Path

This is the path from IBFA. This pathway must match the IBFA path. You may need to change this path if you have changed the path in IBFA. Please contact Insbridge support for further information. It is strongly recommended that you leave the default.

Messaging Server

RateManager is set up to run batches on the same server that RateManager is located on. If you have an especially large batch to run and you want to batch to a different server, you will have to change server locations here. Unless necessary, it is strongly recommended that you leave the default.

SoftRater Server

If you need to rate on another server, you will have to change server locations here. It is strongly recommended that you leave the default.

Backup Share Folder Location

When you make backups of the RateManager database, you can specify the location of the backup file. If the location is local, you will use a local path. If the location is not local, you must be a disk admin to change.

Use Insbridge Com + Admin

This setting must always be true. If there is a conflict, please contact Oracle Insurance support.

Enforce Release Packaging

When set to False, if you do not have a package for a release, you cannot create a full package. If set to True, you will be able to do local packages only. A True setting can be used for testing purposes.

Batch Package Threads

RateManager allows you to change how many threads are used. Threading enables a process to finish faster by splitting the process into smaller processes that run quasi-simultaneously. On multiprocessor systems, using multiple threads enables the operating system to assign the threads to different processors.

In addition, the Framework Administrator also enables you to change the administrator email address for each client. When a process fails, an email will be sent to the person who initiated the process, as well as to the administrator email addresses listed for the client of that process.

WARNING	**Before changing the number of threads, you should consult with your system administrator. Setting the number too high can result in poor performance or even a system crash. If you are unsure of how many threads to use, set the number to 1. For single processor systems, Oracle Insurance recommends a maximum of 2 threads.**

Minimum Login User ID Length

This is the minimum number of characters required for a user ID.

User must change password

This where you set the number of days before a user is required to change his/her password. This setting will only be active when you elect to have users change their password on the user setup screen.

Show Override Date Mask

If enabled, a date mask for 'Date' data types will be displayed when importing a table. If not enabled, this field will not be visible.

Allow Data Type Change

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.

Setting this option to True will allow RateManager users change the data type of a variable or input. Setting this option to False will not allow users to change data types.

Inactive Session Time Out

This is the amount of time that a user sits inactive before being automatically logged out of the system.

Batch Results with New Line

Allows batch results to go to a new line instead of forming one continuous string. A True setting will place a carriage return between result files. A False setting will result in one continuous string without a break.

Online Help Server

Online help is installed with RateManager. This setting is the default server name where RateManager currently resides. Either a server name or an IP address can be entered here. If needed, you can change the name of the server. For example, if the machine name is not the same as the host name, you may need to change the name in order for online help to function.

Change Control

If change control is on, it will be mandatory for users to enter a change control entry and justification to any element or program when it is revisioned. If change control is off, the option will not be presented.

Logs

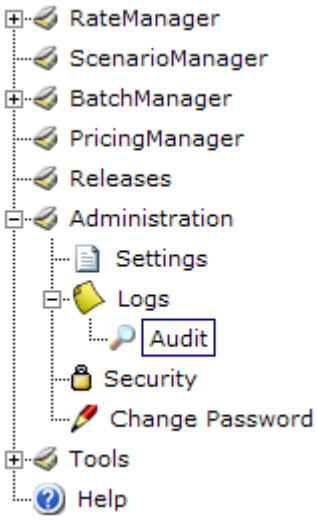
RateManager can keep an audit log of user activity. Audit logs contain information such as action performed, user ID, date and time stamp, and change control. Audit logs also can include program information such as program ID, program version and line of business as well as element information.

The audit log feature has to be enabled at the group level. On the Group Management screen, Administration➢Security➢Group Management, select the group where you want to apply auditing. There are three options for auditing the group:

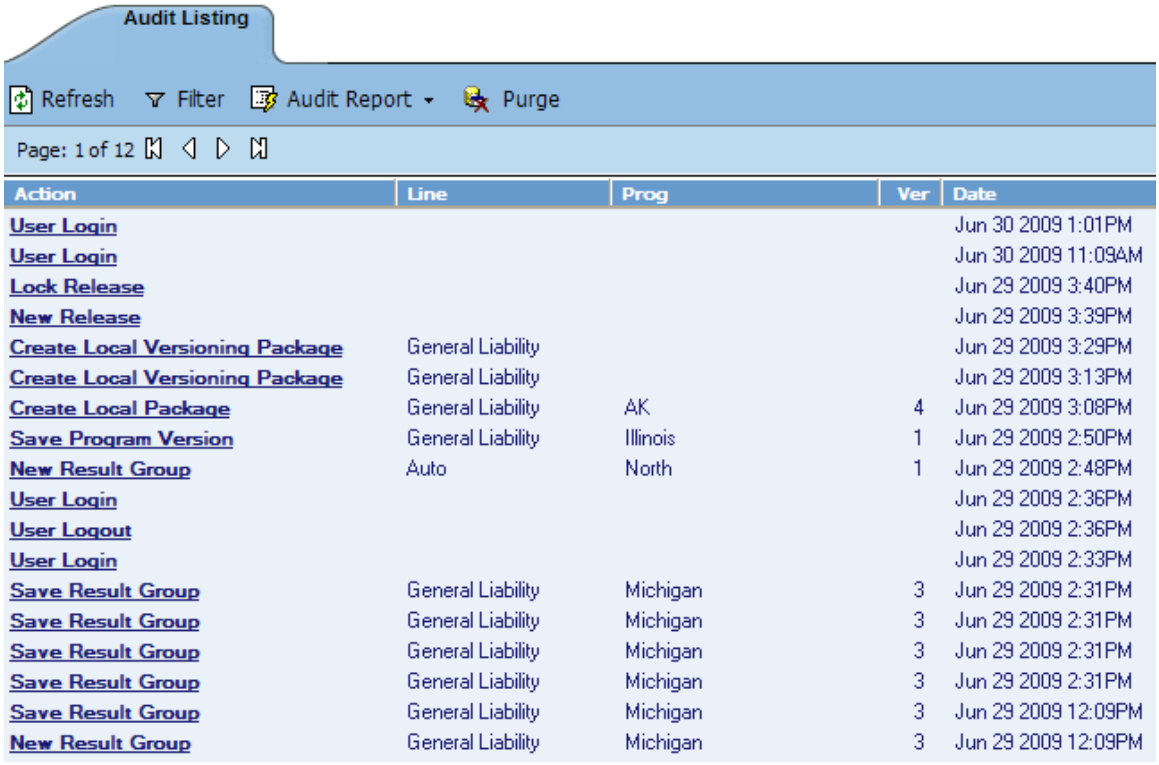
- **None** – no auditing will be done.
- **Normal** – all saves and deletes will be tracked.
- **High** – all new, creates, changes, saves and deletes for the group will be logged.

To View Logs

1. From the menu tree, select Administration, click on **Logs** and then click on **Audit**.



2. This will open the **Audit Listing** screen.



Action	Line	Prog	Ver	Date
User Login				Jun 30 2009 1:01PM
User Login				Jun 30 2009 11:09AM
Lock Release				Jun 29 2009 3:40PM
New Release				Jun 29 2009 3:39PM
Create Local Versioning Package	General Liability			Jun 29 2009 3:29PM
Create Local Versioning Package	General Liability			Jun 29 2009 3:13PM
Create Local Package	General Liability	AK	4	Jun 29 2009 3:08PM
Save Program Version	General Liability	Illinois	1	Jun 29 2009 2:50PM
New Result Group	Auto	North	1	Jun 29 2009 2:48PM
User Login				Jun 29 2009 2:36PM
User Logout				Jun 29 2009 2:36PM
User Login				Jun 29 2009 2:33PM
Save Result Group	General Liability	Michigan	3	Jun 29 2009 2:31PM
Save Result Group	General Liability	Michigan	3	Jun 29 2009 2:31PM
Save Result Group	General Liability	Michigan	3	Jun 29 2009 2:31PM
Save Result Group	General Liability	Michigan	3	Jun 29 2009 2:31PM
Save Result Group	General Liability	Michigan	3	Jun 29 2009 12:09PM
New Result Group	General Liability	Michigan	3	Jun 29 2009 12:09PM

Figure 356 Viewing Audit Logs

3. The **audit listing** screen contains a list of audits logs. To view a specific log, click on the underline action name. The log details will be displayed in **Preview Window** located in the lower portion of the screen.

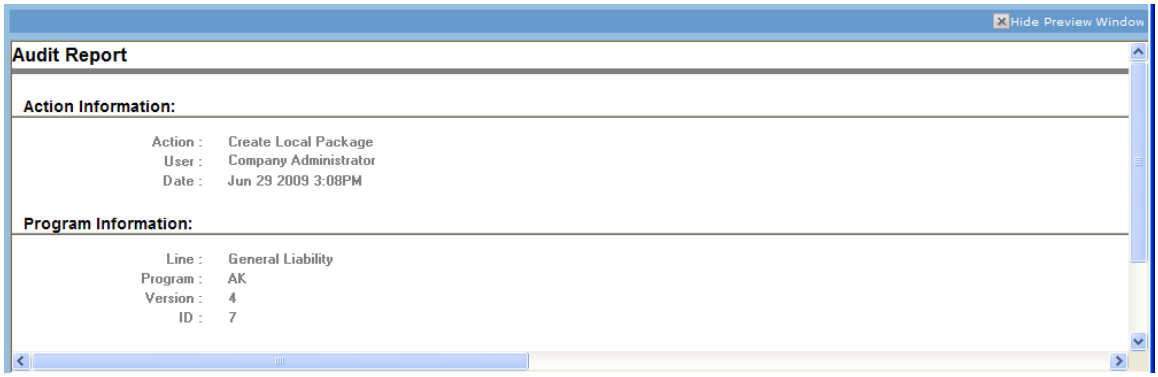


Figure 357 Audit Log Preview Screen

The preview window can be either shown or hidden. When shown, the preview window will update to show the currently selected audit log. To hide the preview window, click the **Hide Preview Window** button.

NOTE	If logs are not displayed, please verify that the Insbridge Messaging Service is on. If the Insbridge Messaging Service is off, logs will not be displayed.

Filtering

Filtering allows you to filter audit logs by specific criteria. When you select a filter, any audit logs with that criteria will be returned to the screen. Results are listed newest to oldest. The results on the screen can then be used to create an Audit Report or be purged.

Action: You can filter by words found in the action description. For example, Login, Save, Delete or Control. You do not have to enter the entire phrase. You can enter New and any action description with the word New in it will be returned. Your filter options will depend upon the level of auditing the group has. If your group(s) has high auditing, more audit logs will be created and you will have more types of actions you can filter on.

Line Desc: You can select an active line of business from the drop down menu or you can click the Custom link to enter in your own description.

Program ID: You can enter in the exact program ID. Only exact matches will be returned.

Program Ver: You can enter in the exact program version. Be aware that program versions are not unique. If you enter in 1, you may get many results for program version 1 from multiple lines of business and multiple programs. Only exact matches will be returned.

User FirstName: You can enter in a user first name up to 20 characters. Only exact matches will be returned.

User LastName: You can enter in a user last name up to 20 characters. Only exact matches will be returned.

From Date: Dates can be entered in mm-dd-yyy format. Only entering in a From Date will return audit logs from that date until current. Date ranges can be returned by entering in both and from and to dates.

To Date: Dates can be entered in mm-dd-yyy format. Only entering in a To Date will return all audit logs from the beginning of the audit log until that date. Date ranges can be returned by entering in both and from and to dates.

Control Number: You can enter in the exact Change Control number or tag used when creating the new revision. This is helpful if you want to make sure all changes were done against a particular change order. You do not have to go into each element to search. You can come here, enter in the change control identifier and view the list here. You can also do an action filter by the word Control to get a listing of all change controls.

- You can choose one or more filters.
- Filters remain in place until your remove them or leave the screen.
- To clear a filter, click the **Clear** button. After you clear a filter, all Audit Logs will be returned.

Filtering Audit Logs

1. On the audit logs screen, click Filter. This will pull up a filter screen where you can enter criteria that will narrow your audit listing results.

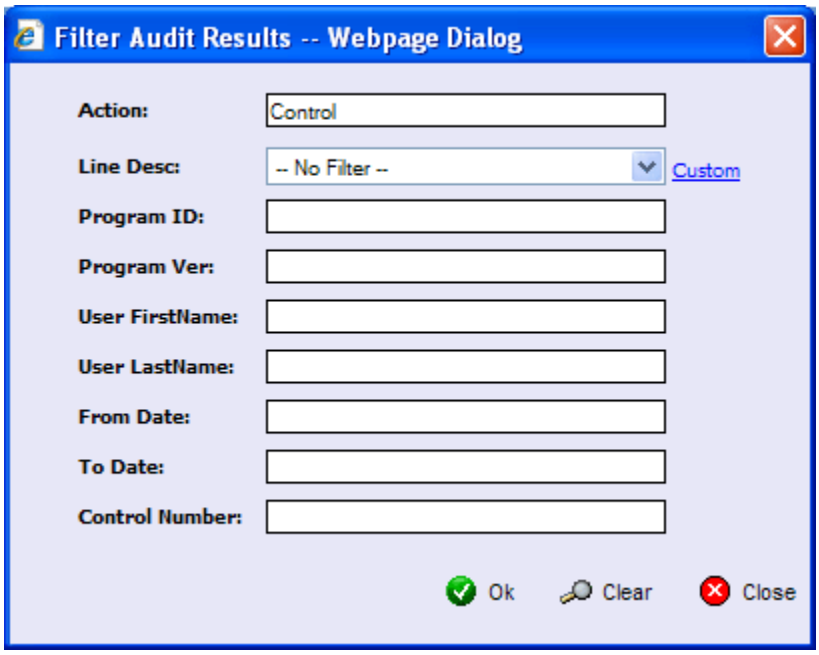


Figure 358 Filter Selection

2. After you have entered your filters, click **OK** to view your results.

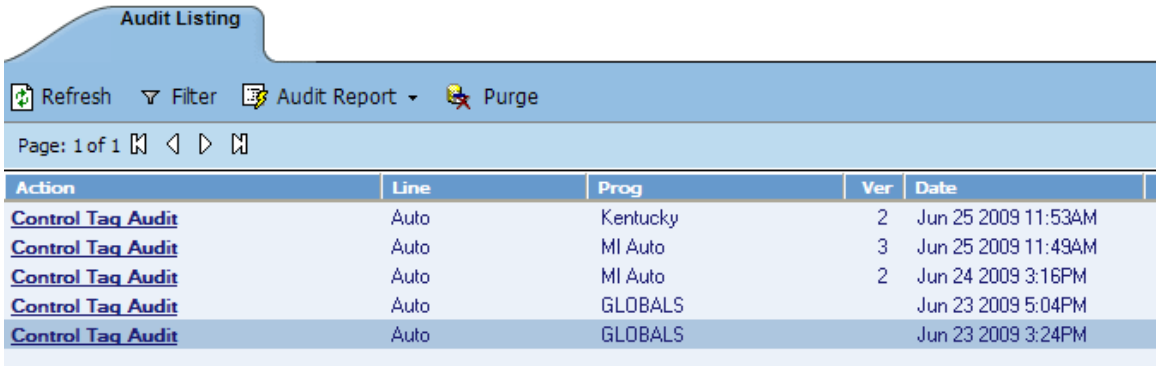


Figure 359 Filtered Audit Listing Results

Individual logs can be viewed or deleted.

Audit Report

An audit report for all audit logs currently displayed on all pages by filter criteria can be produced. If you want an Audit Report for all audit logs, make sure the filter has been cleared. If you want an Audit Report for a specific type of audit log, make sure to filter by that criteria.

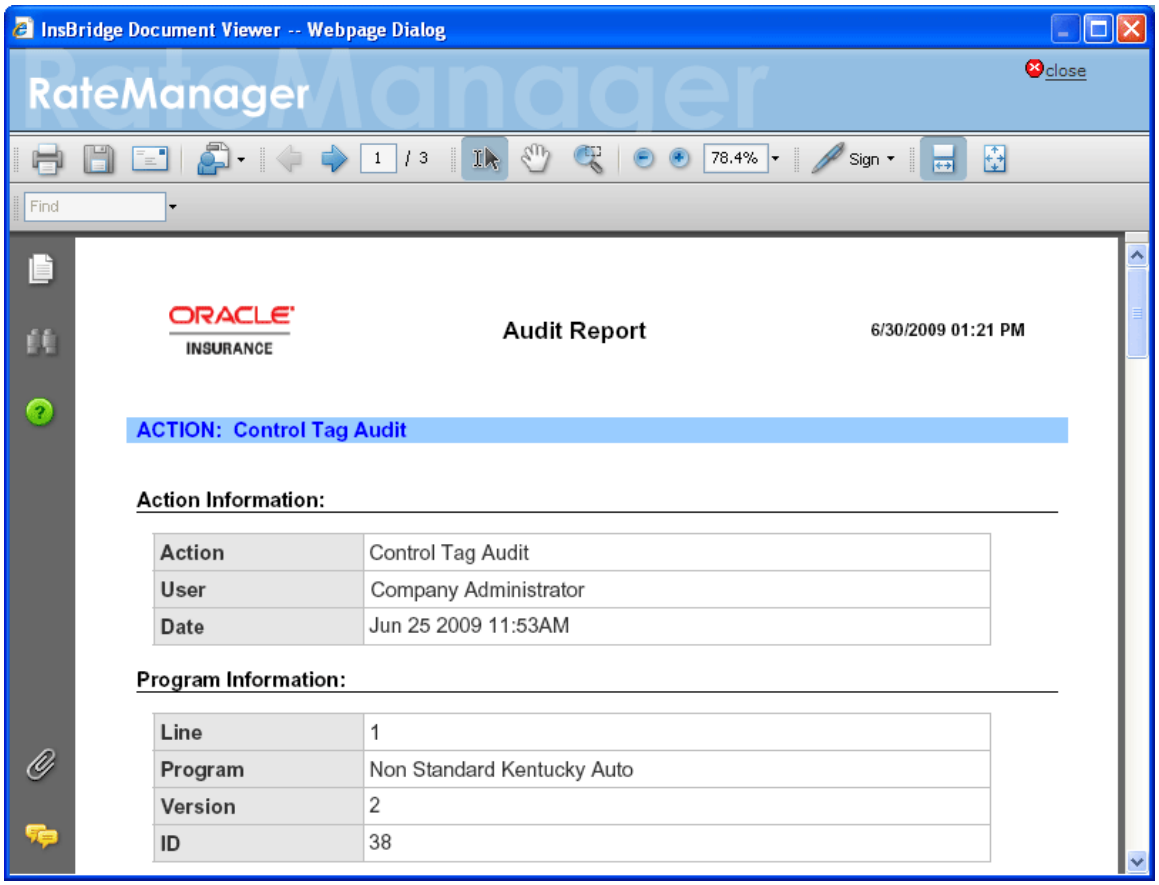


Figure 360 Audit Report

Creating an Audit Report

To create an Audit Report, enter in the criteria you want to filter by and click the **Audit Report** button. Reports will be displayed in the Insbridge Document Viewer. These documents are read-only. Reports can be saved to your local hard drive or network or printed. No editing can be done on the Insbridge Document Viewer.

NOTE	When you do a "Save As" from the Insbridge Document Viewer, you should rename the file. By default, when you go to save a file in the Insbridge Document Viewer, everything will be named "InsbridgeDocument". It is recommended that you re-name the file.

Report Details

The report will contain details for each of the audit logs included, starting with the newest. Each log will have action information, defining the action taken, the user and the date. Program information, such as LOB, program, program version, and program ID, may be included. If applicable, element/item information including description, revision and ID may be included.

NOTE	*OBI Publisher must be installed and running in order for Program and Program Version Reports to be displayed. If you receive an OBI Publisher error, please contact your system administrator.*

Purging Audit Logs

Audit logs can be purged at any time. Clicking the Purge button will remove all audit logs currently displayed on all pages by filter criteria. For example, if you have run a filter for all logs created on June 23, 2009, the screen will display all logs created on that day only. The logs may consist of one page or many pages. If you click Purge, all logs for June 23, 2009 will be purged. No other logs will be purged. To view remaining logs, clear the filter.

If you want to purge all audit logs, do not place a filter on the list. If you only want to purge selected items, place a filter on the list. Purge will only remove the audit logs that are displayed on the Audit Listing screen.

1. To remove an audit that is no longer required, highlight the audit and click Purge.

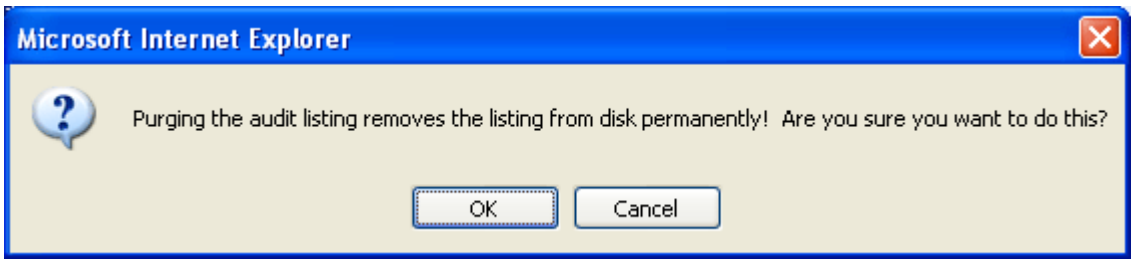


Figure 361 Purging an Audit List

2. Click **OK** to remove the log. Click **Cancel** to return to the previous screen.

NOTE	Purge Logs and Control Tag Audit logs will not be purged in bulk. These logs must be removed one at a time using the right click menu.

Right Click Menu

There is a right click menu available on every audit log.

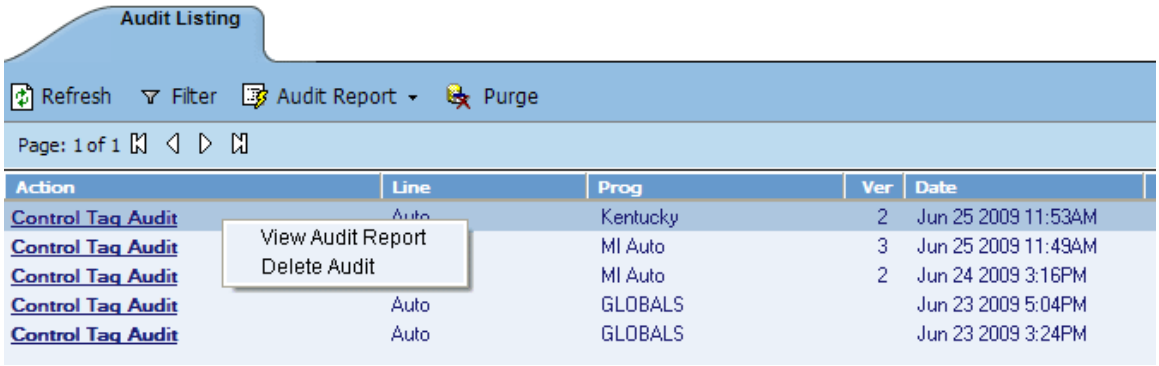


Figure 362 Audit Listing Right Click Menu

The right click menu contains two options:

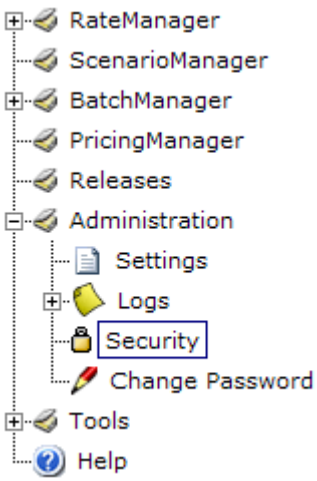
- **View Audit Report:** This option will display the audit report for this audit log only in a printable form. If you do not need to print out an audit report, double click the log and view the audit details at the bottom of the screen.
- **Delete Audit:** This option will delete the selected audit log only. Use this feature to delete logs that will not be removed in a purge, such as purge logs and Control Tag Audit logs.

Introduction to Security

Any administrator may configure RateManager security settings. Usernames and groups can be created and system rights assigned. Groups can be created to grant users access to specific lines of business and specific screens within that line of business (variables, algorithms, etc.), with or without write access. Groups also can be given access to the testing modules (ScenarioManager, BatchManager and PricingManager).

To Navigate to the Security Section

1. Using the menu tree, select **Administration** and then **Security**.



2. If you are a member of the Administrator group, the **Security** screen will be displayed with the following options:

   - User Management
   - Group Management
   - Session Management

Introduction to User Management

The user management section allows an administrator to add, edit and delete users. This portion of RateManager is only available to users who are members of the Administrator group.

To Navigate to User Management

1. From the menu tree, click **Security** and then click **User Management**.
2. This will open the User Management screen.

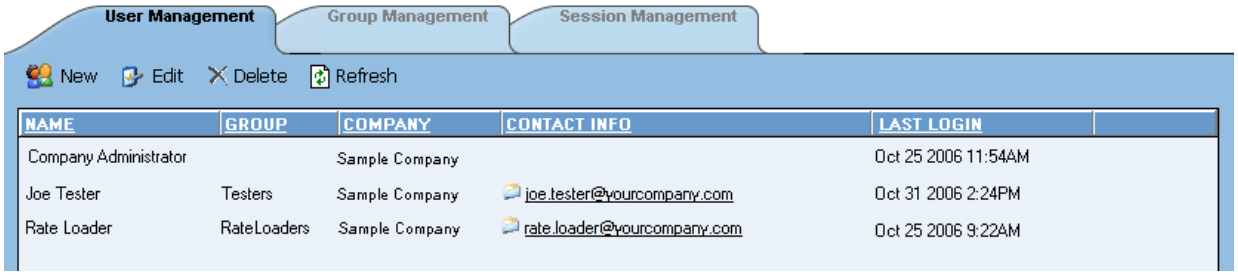


Figure 363 User Management Screen

3. From here, you can:

   - Add a User
   - Edit a User
   - Delete a User
   - Navigate to Group Management
   - Navigate to Session Management

Adding a User

New users can be added from the **User Management** screen. All new users will be assigned the default password, **password.** New users should log in as soon as possible and change their password.

To Add a New User

1. Navigate to the **User Management** screen.

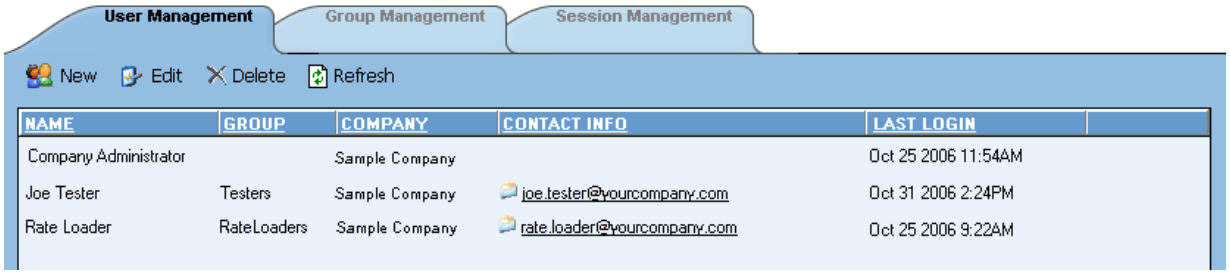


Figure 364 Adding a New User

2. Click to open the Add User screen.

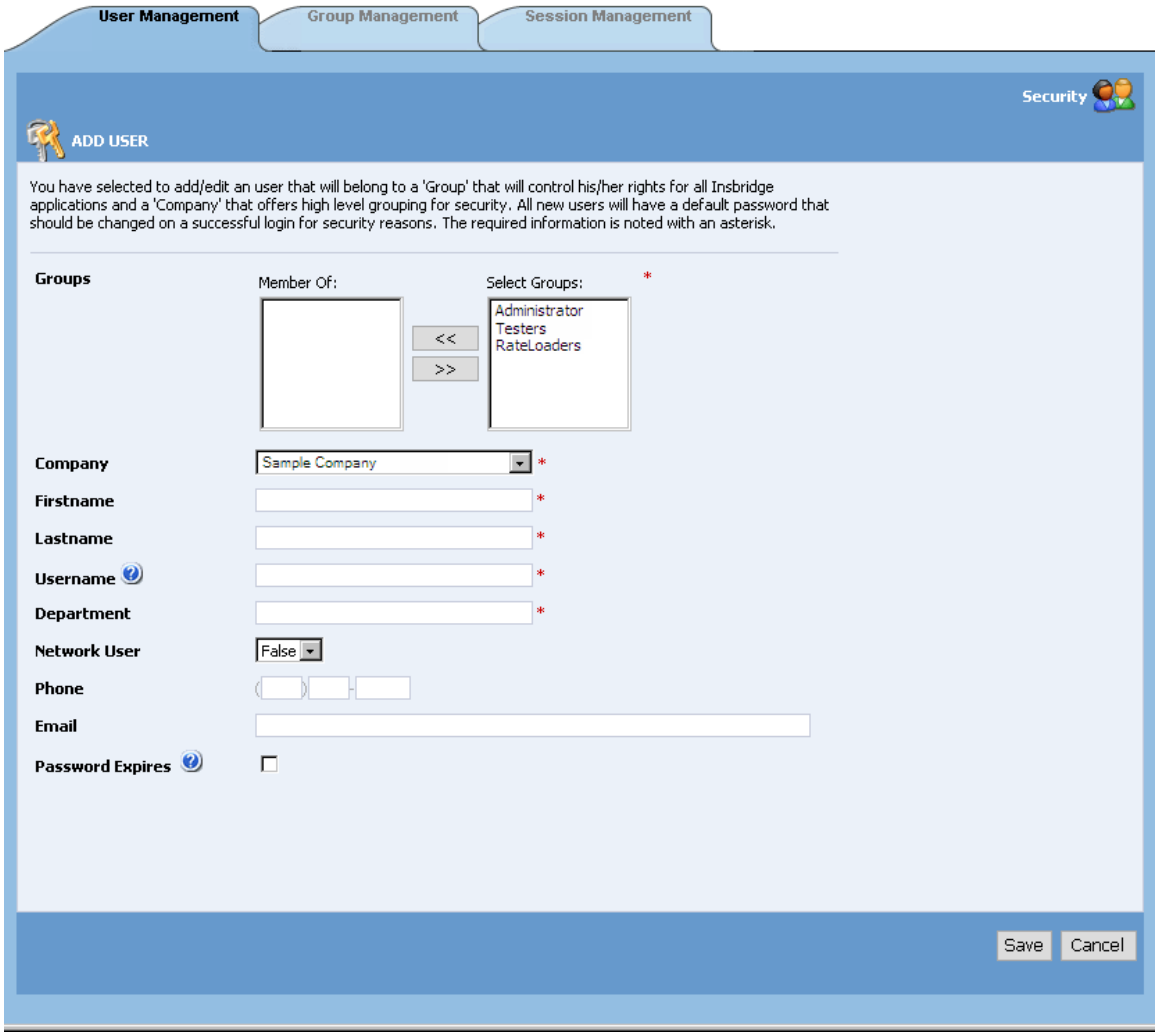


Figure 365 User Management Screen

3. Select the **Group**(s) the new user will belong to by selecting a group or groups from the Select Groups list and then clicking the << button.

4. Select the **Company** the user will belong to from the drop down listing.

5. Enter a **First** and **Last** name for the user in the appropriate text boxes.

6. Enter a **Username** for the new user. The username must be at least six, but fewer than twelve, alphanumeric characters and can include an underscore (_) or period (.).

7. Enter a **Department** for the user.

8. Select whether the new user is a **Network User** by selecting **True** or **False** from the drop down. If you select **True,** the user's credentials (username and password) will be validated using Windows Authentication Tokens. The username must match the network user ID. If you select **False,** the user must enter a valid username and password via the RateManager login screen.

9. Optionally, enter a **Phone Number** and **Email Address** for the new user.

10. If you want the user's password to expire, click the box next to **Password Expires**. The Setting screen will contain the number of days required for a password change.

11. When you are finished, click Save. The user will be added to the system and the user list will be updated. The new user can now log in using the username you assigned them and the default password, **password**.

12. The user should change their password the first time they log in. See Changing Your Password for more information.

Editing a User

This section allows an administrator to change a user's information such as their email address or phone number. It also allows for a user's password to be reset.

To Edit a User

1. Navigate to the **User Management** screen.

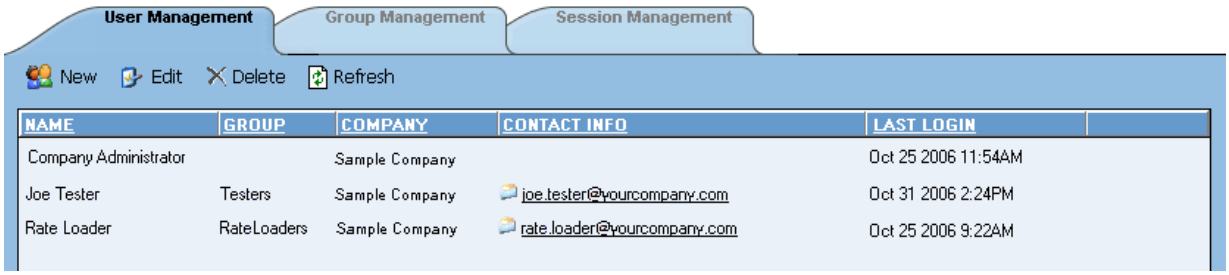


Figure 366 User Management for Editing a User

2. Select the user you want to edit and click Edit. You also can edit a user by double-clicking their name.

3. This will open the **Edit User** screen.

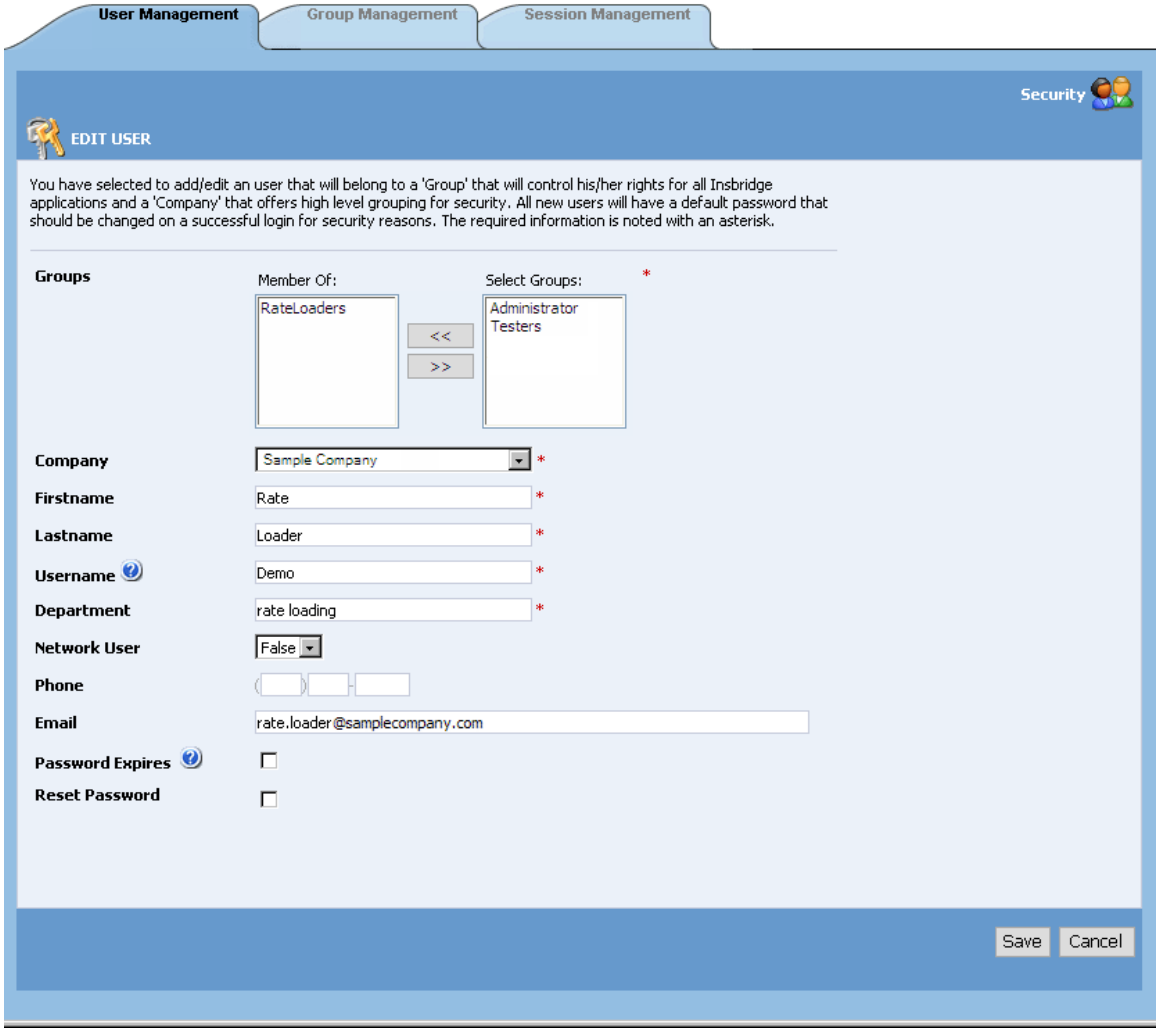


Figure 367 Editing a User

4. This screen is similar to the Add User screen and all information can be edited, with the following exception:

    - You have the option to reset a user's password. If a user forgets their password, check this box. The user's password will be reset to the default password, **password**. The user should change their password the next time they log in.

5. When you have finished making changes, click Save to update the user's information and refresh the user listing. If you do not want to save your changes, click Cancel.

Deleting a User

If a user is no longer needed, they can be deleted.

To Delete a User

1. Navigate to the User Management screen.

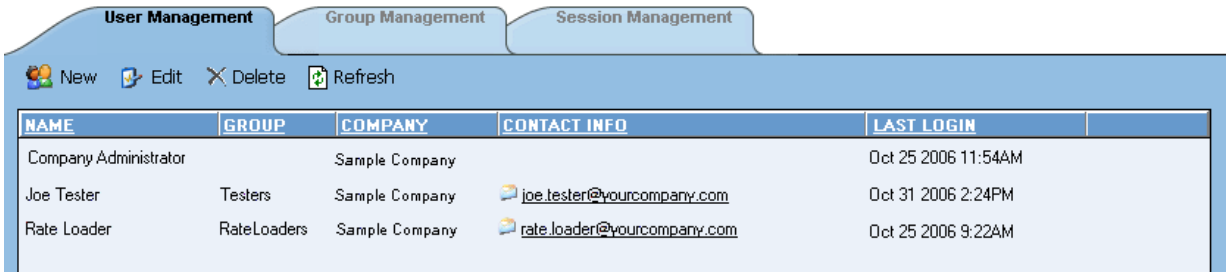


Figure 368 User Management for Deleting a User

2. Select the user you want to delete and click Delete.

3. You will be asked to confirm deletion of the user.

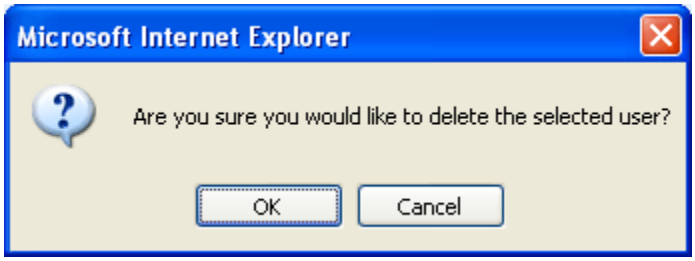


Figure 369 Confirmation Message for Deleting a User

4. Click **OK** to delete the user and refresh the user listing. Click **Cancel** to return to the user listing without deleting the user.

Introduction to Group Management

The group management section allows an administrator to add, edit and delete user groups. Similar to groups in Windows, RateManager groups are used to assign rights to a set of users.

For example, you may have one group called **Testers** that can only access ScenarioManager, BatchManager and PricingManager and another group called **AutoLoaders** that only has access to the auto line of business.

The **Administrator** group is a default group and should not be deleted. The **Administrator** group is the only group that has access to the **Security** section of RateManager.

To Navigate to Group Management

1. From the menu tree, click **Security** and then click **User Management**.
2. This will open the **User Management** screen.

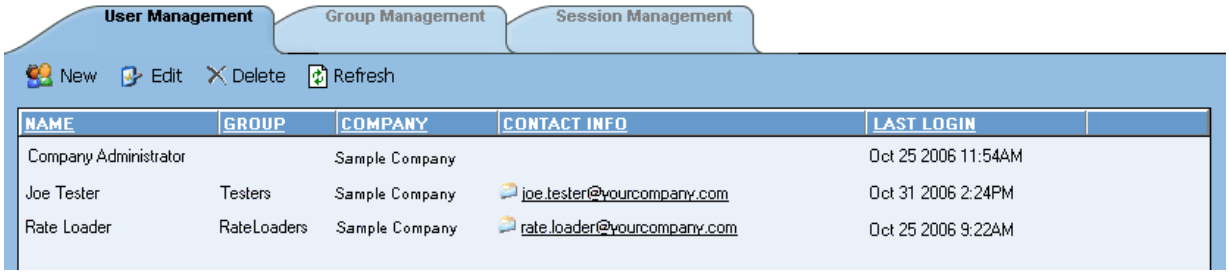


Figure 370 User Management Screen for Group Management

3. Click the **Group Management** tab to open the listing of groups.

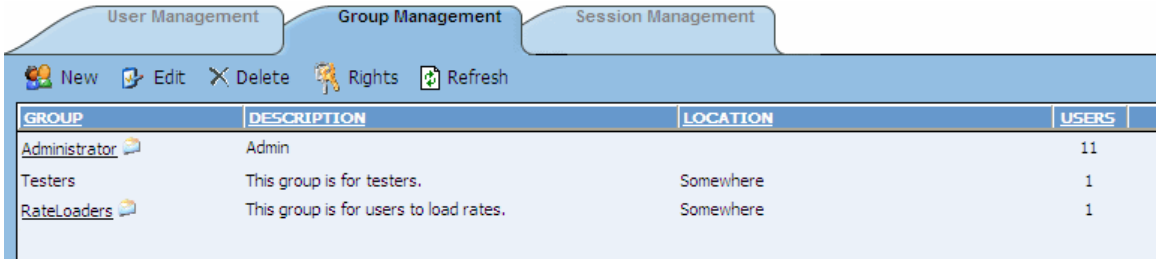


Figure 371 Group Management

4. From here, you can:
    - Add a Group
    - Edit a Group
    - Edit a Group's Rights
    - Delete a Group
    - Navigate to User Management
    - Navigate to Session Management

Adding a Group

New groups can be added easily from the **Group Management** screen.

To Add a Group

1. Navigate to the Group Management screen.

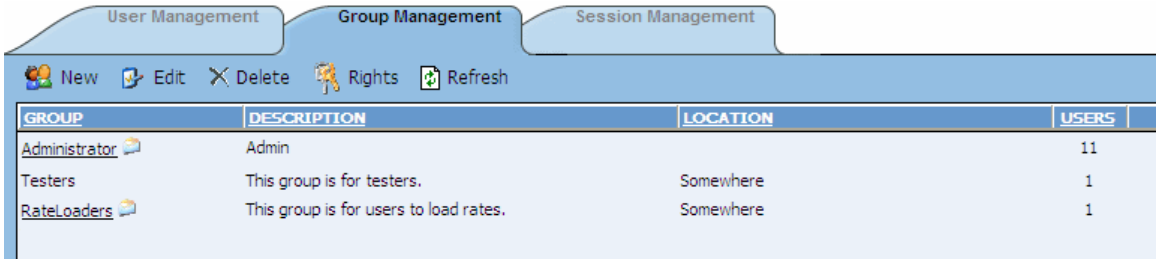


Figure 372 Group Management Screen for Adding a Group

2. Click to open the Add Group screen.

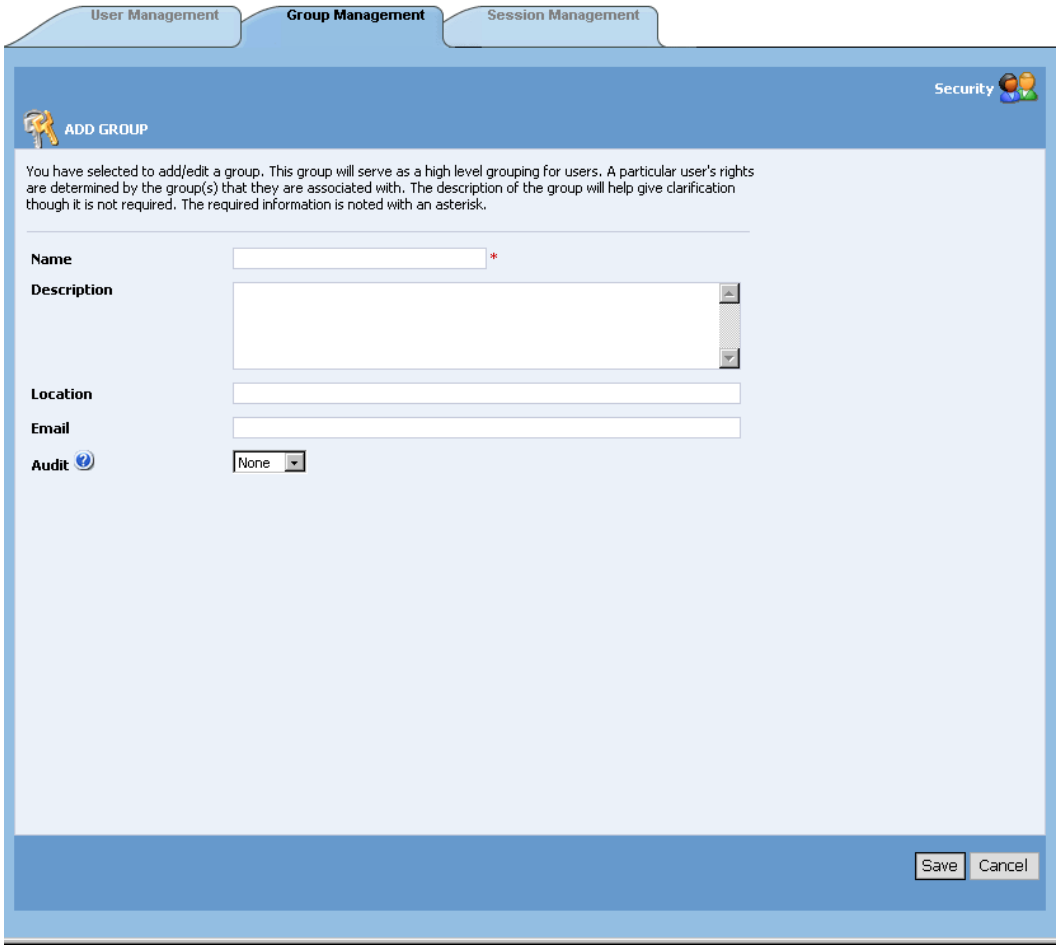


Figure 373 Adding a Group

3. Enter a **Name** for the new group. The name can be any combination of alphanumeric characters, with one to fifty characters. Blanks, periods, underscores, etc. are not allowed.

4. Optionally, enter a **Description, Location** and **Email** address for the new group.

5. Check if you want Auditing for this group. Auditing allows for logs to be kept and displayed in the View history feature. There are three levels:

a. **None**: Auditing will not be tracked for the group.
b. **Normal**: All saves and deleted for the group will be tracked.
c. **High**: All new items, saves and deleted for the group will be tracked.

The level of auditing will determine the detail of the View History feature.

6. When you are finished, click Save. The group will be added and the group list will be updated. Users can now be assigned to the group through User Management. To set the rights for the group, see Editing a Group's Rights.

Editing a Group

Edit a group when you want to change the group's name, description, location or email address.

To Edit a Group

1. Navigate to the Group Management screen.

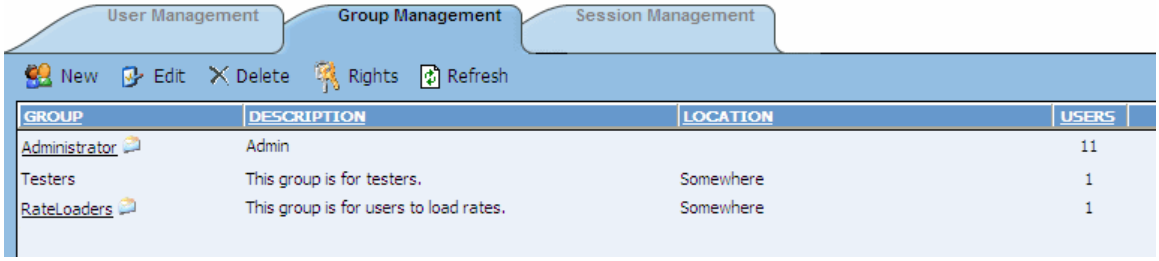


Figure 374 Group Management for Editing a Group

2. Select the group you would like to edit and click Edit. You also can edit a group by double-clicking it. If an email address has been entered for the group, the group's name will be underlined (such as Administrator). For these groups, click to the right of the group name to select it or click the underlined name to send the group an email.

3. This will open the **Edit Group** screen.

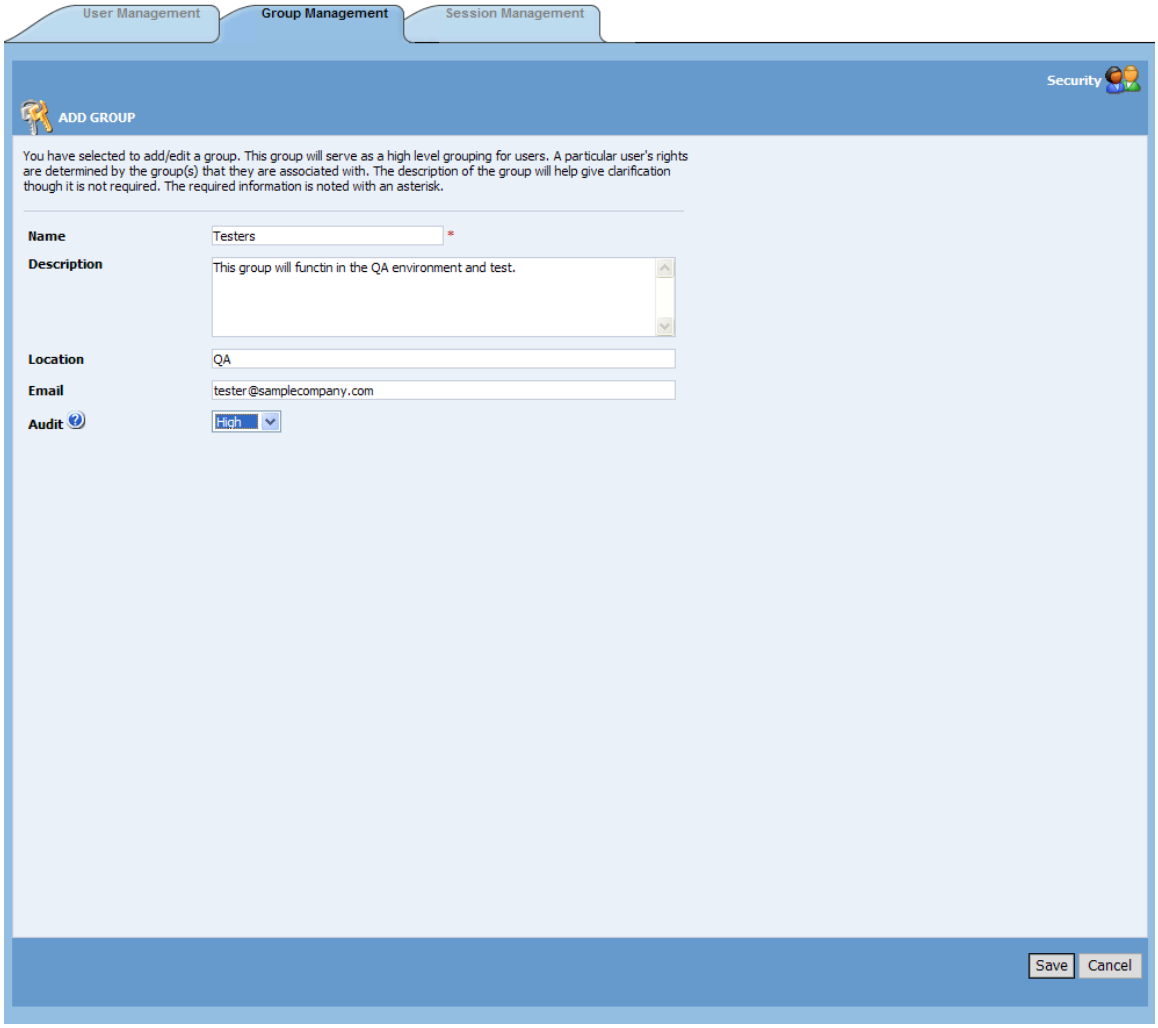


Figure 375 Editing a Group

4. This screen works the same as the **Add Group** screen and all fields can be edited.
5. When you have finished making changes, click Save to update the group's information and refresh the group listing. If you do not want to save your changes, click Cancel.

Editing a Group's Rights

Edit a group's rights when you want to change the applications and lines of business users of that group have access to.

1. Navigate to the **Group Management** screen.

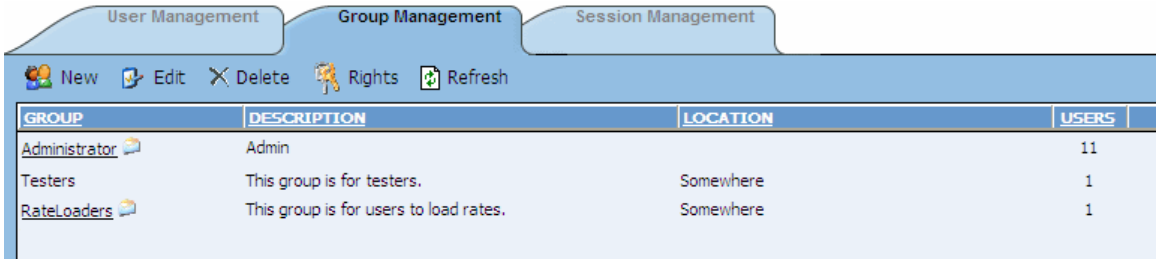


Figure 376 Group Management for Editing Group Rights

2. Select the group whose rights you want to edit and click Rights. If an email address has been entered for the group, the group's name will be underlined (such as Administrator). For these groups, click to the right of the name to select them.

3. This will open the **Rights Management** window.

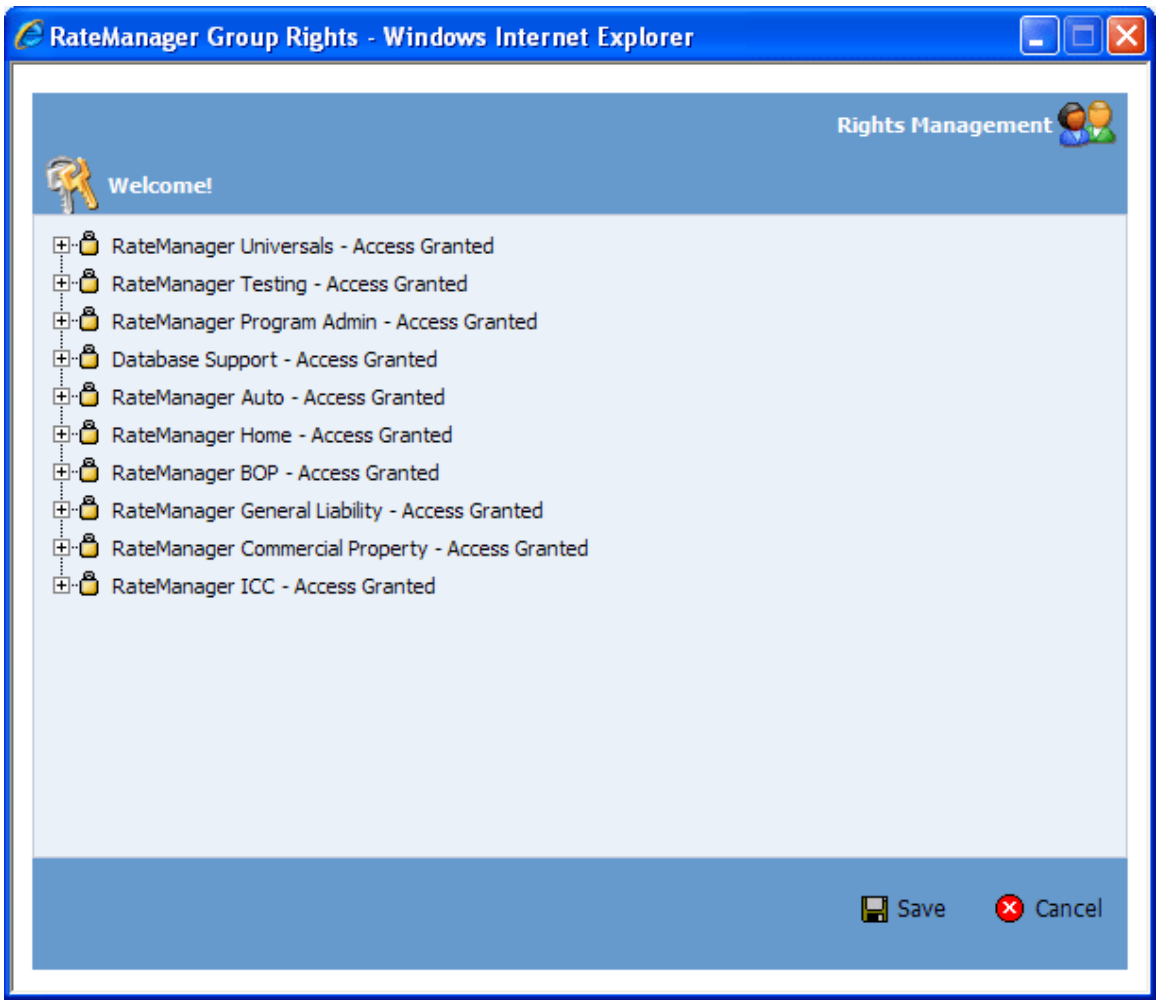


Figure 377 Editing Group Rights

4. From here, you can assign rights to the group for the various sections of RateManager. To do so, expand the appropriate section and place a check next to an item to give the group access to that section.

For example, if you wanted to allow this group to be able to access and change all sections of Auto programs, you would expand **RateManager Auto** by clicking the ⊞ (plus box). You would then expand each section of Auto (Variables, Algorithms, etc.) and place a check in the **Write Access** box for each section. If you only wanted to allow a group to access a section, but not make any changes, you would only place a check next to that item and not the **Write Access** box.

Figure 378 Expanded Group Rights Management Screen

5. To give a group access to the testing portion of RateManager (ScenarioManager, BatchManager and PricingManager), expand **RateManager Testing** and place a check next to **ScenarioManager**.

6. When you are finished making changes, click Save. To cancel your changes, click Cancel.

Deleting a Group

If a group is no longer needed, it can be deleted. Only groups that currently have no users assigned to them can be deleted.

To Delete a Group

1. Navigate to the Group Management screen.

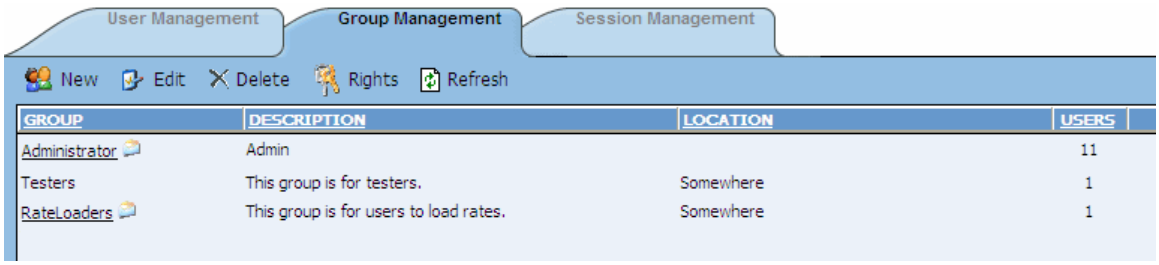


Figure 379 Group Management for Deleting a Group

2. Select the group you want to delete and click Delete.

3. If the group currently has users assigned to it, you will receive an error.

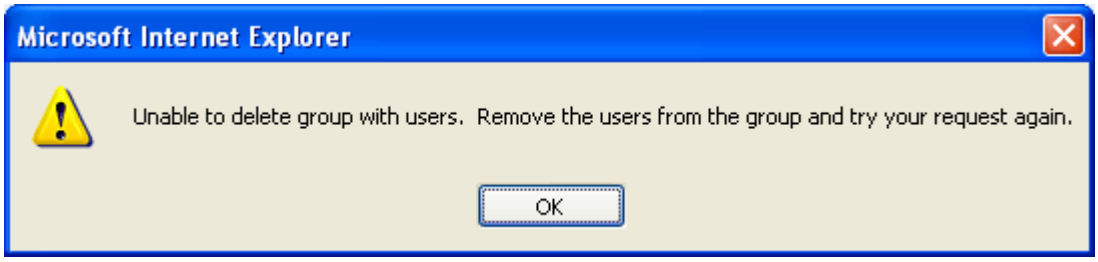


Figure 380 Error Message for Deleting a Group

4. Remove all users from the group by either deleting the users or assigning the users to another group (see Editing a User) and then try your delete request again.

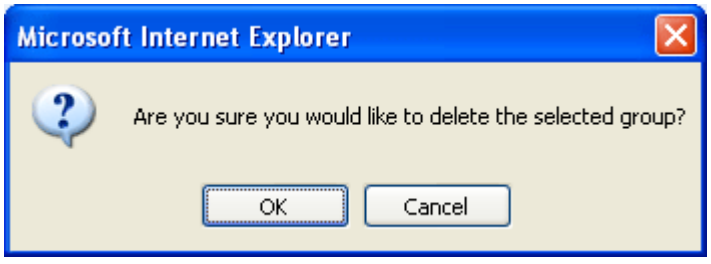


Figure 381 Deleting Group Confirmation Message

5. If the group does not have any users assigned to it, you will be asked to confirm deletion of the group.

6. Click **OK** to delete the group and refresh the group listing. Click **Cancel** to return to the group listing without deleting the group.

Introduction to Session Management

The Session Management screen allows an administrator to view the users who currently have a RateManager session open and disconnect them to free up a license.

To Navigate to Session Management

1. From the menu tree, click **Security** and then click **User Management**.

2. This will open the **User Management** screen.

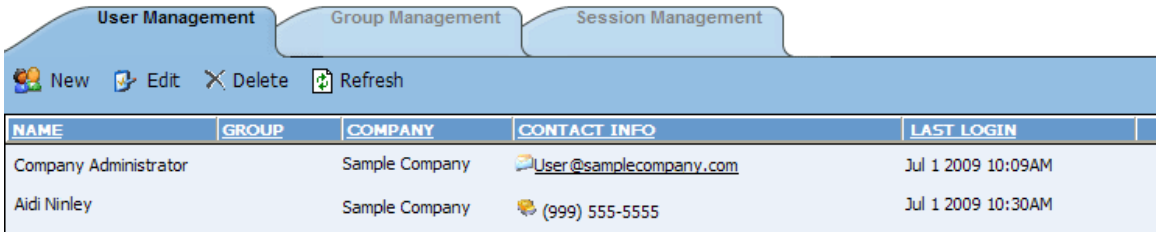


Figure 382 User Management for Session Management

3. Click the **Session Management tab** to open the listing of current sessions.

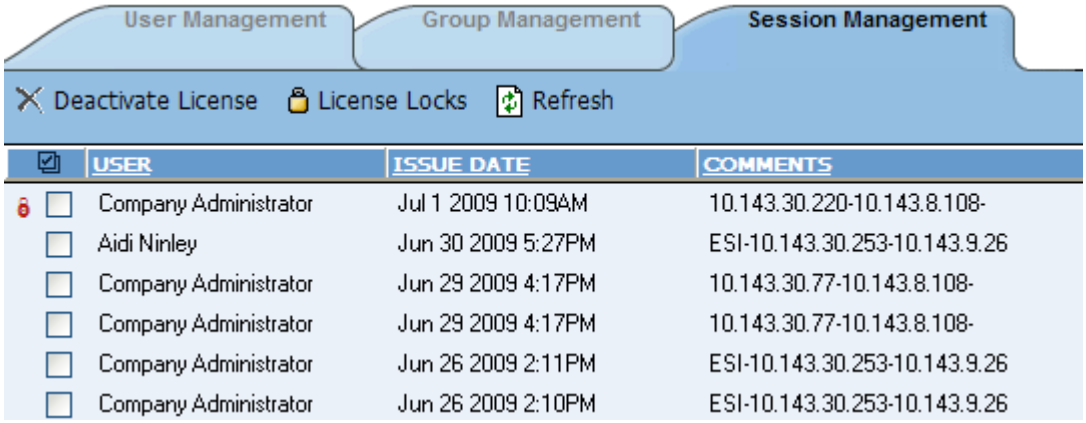


Figure 383 Session Management

4. From here, you can:

   - Deactivate a License
   - Display Element or Program Locks
   - Navigate to the User Management tab
   - Navigate to the Group Management tab

Deactivating a License

If a user quits RateManager without first logging out, their license will still remain in use. In this event, you need to deactivate the license so that it will be available for other users. Deactivating a license will also release any locked elements that this user may have outstanding.

To Deactivate a License

1. Navigate to Session Management.

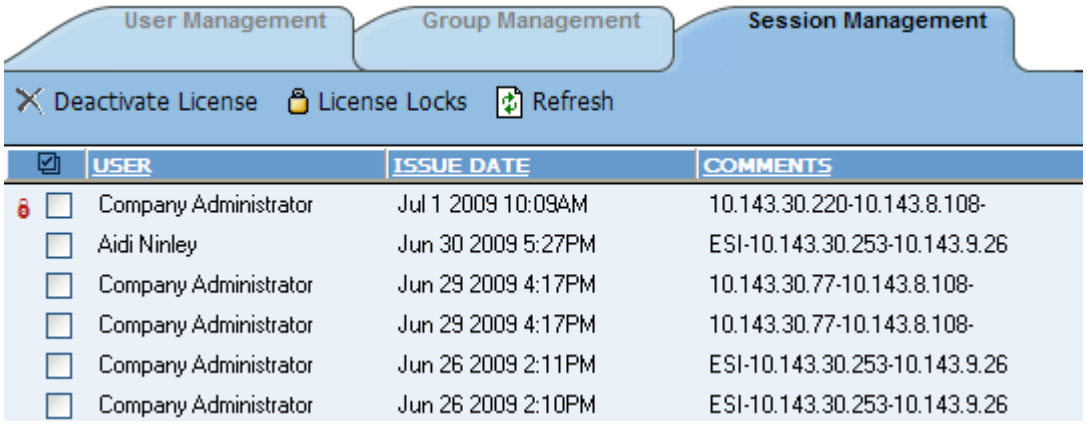


Figure 384 Session Management to Deactivate a License

2. Place a checkmark next to each license you want to deactivate (free) and then click Deactivate License.

3. You will be asked to confirm the deactivation.

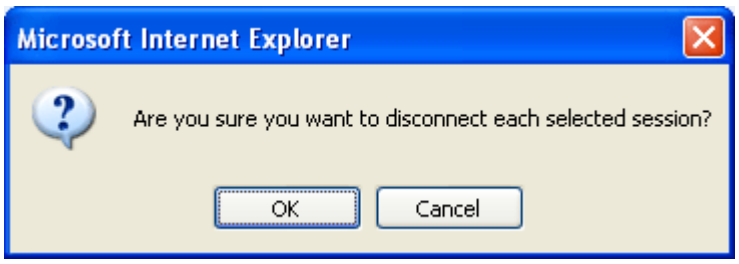


Figure 385 Confirming a Deactivation

4. Click **OK** to deactivate the licenses or **Cancel** to return to the listing.

Unlocking Element Locks

A lock icon next to a users name indicates that an element lock has been placed on an element in the system by this user. If the element has been in place for an extended period of time, the system administrator can end their session and free the element up.

To view a locked session, place a check mark in the box next the user and click the **License Locks** button. A popup window will be displayed indicating which element the user has locked and for how long.

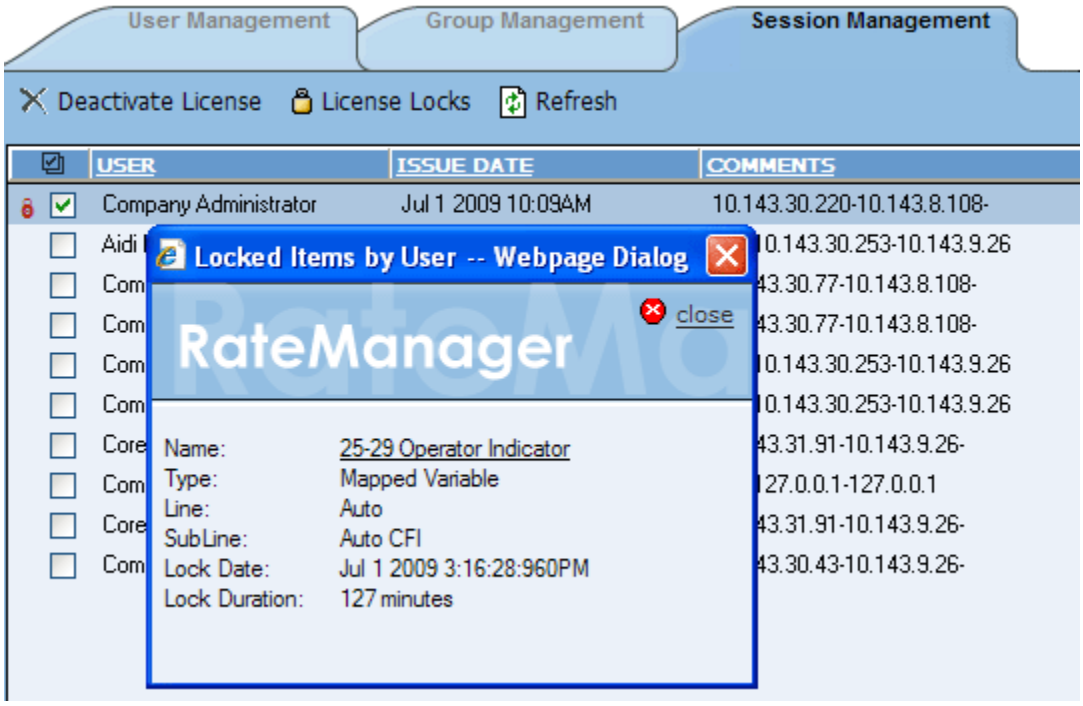


Figure 386 User Session with Extended Locked Element

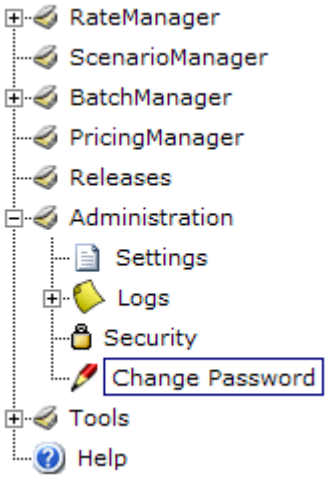
The Locked Items by User box is for information only. No action can be performed here. If you have decided to end this user's session, you can deactivate the license. This will free the element up.

Changing Your Password

It is recommended that you change your password periodically to prevent other users from logging in and making changes using your user ID.

To Change Your Password

1. From the menu tree, select the Security and then click **Change Password**.



2. This will open the **Change Password** window.

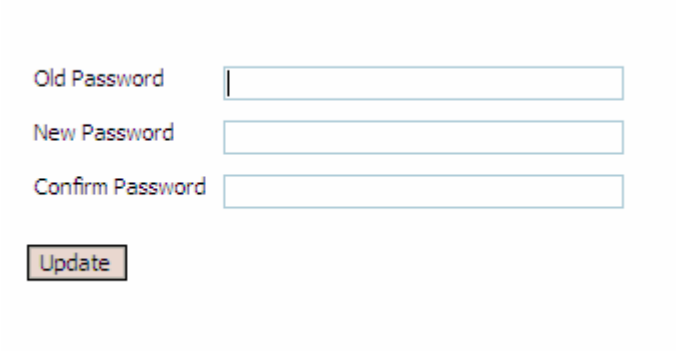


Figure 387 Change Password Screen

3. Enter your current password in the **Old Password** text box and enter your new password in the **New Password** and **Confirm Password** text boxes. As you type, the text will be shown as asterisks (*) or bullets (•☐), depending on your browser.

4. Your password must be at least six, but fewer than twelve, alphanumeric characters.

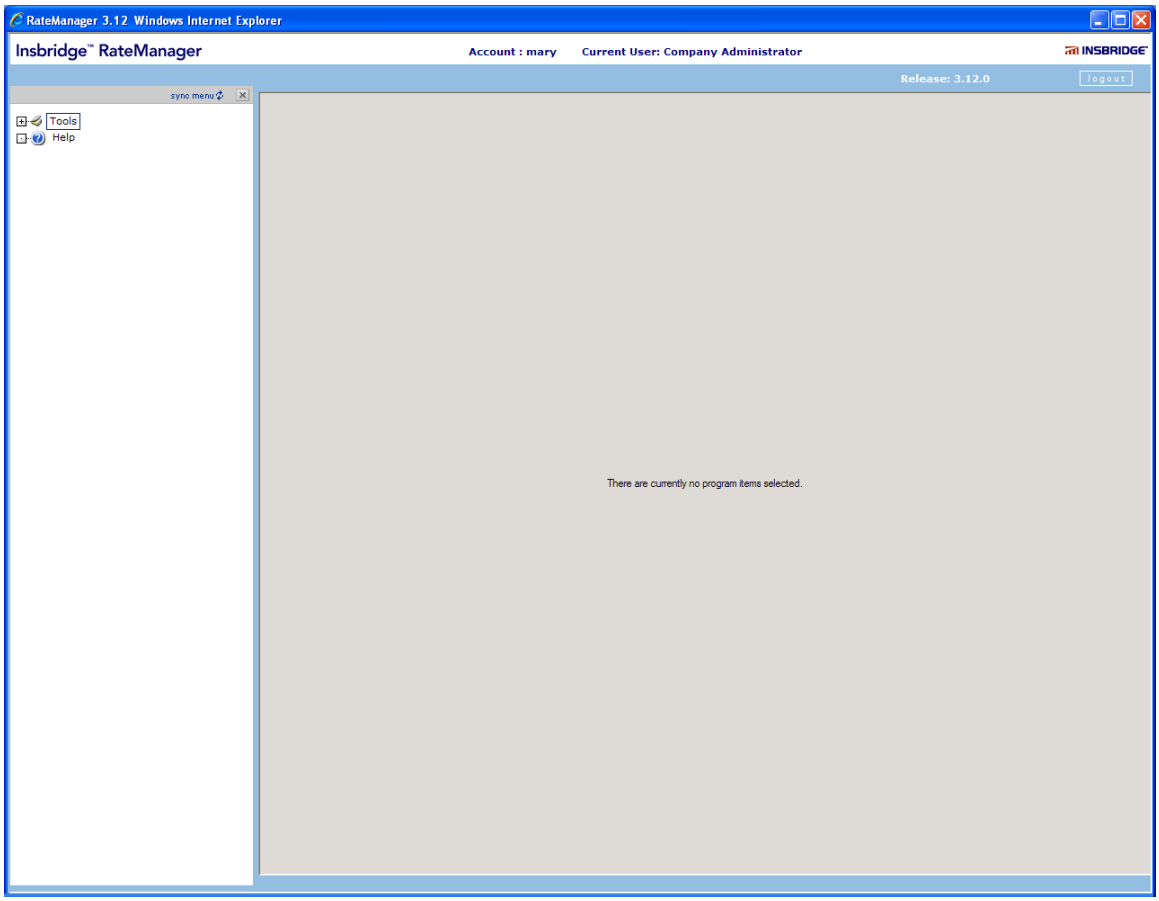
5. When you are finished, click Update to update your password. The next time you log into RateManager, you will need to use your new password.

22

Tools

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

Please navigate to Tools➢Database➢Updates (Tab) and run the necessary updates. See page 428 for more information.



The Tools section of RateManager allows an administrator to manage, update and troubleshoot the RateManager system.

Tools has three options:

- DataBase
- Import
- Versions

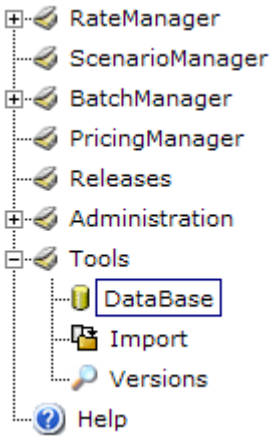
DataBase

The backup tab located in the DataBase option of RateManager allows an administrator to create and restore backups of the RateManager database. See **Create a Database Snapshot** for more information.

The database option also contains an update tab that lists the available updates for this version of RateManager. See **Update** for more information.

Navigating to Database

1. From the menu tree, click **Tools** and then click **DataBase**.



2. This will open the **Backups** window. Backups has two tabs:

   - **Backups** – used for creating and restoring database backups.
   - **Updates** – a listing of available updates for this version of RateManager.

To Create a Database Snapshot

If you need assistance implementing logic or an error is found in the system, a backup or snapshot can be made of the database. That snapshot can then be sent to Oracle Insurance Support, where it will be restored. Our support personnel and analysts can then work from the snapshot to determine the best way to implement logic or diagnose a problem.

You must be a Disk Admin to perform backups or restores.

1. Navigate to the **Backups** tab.

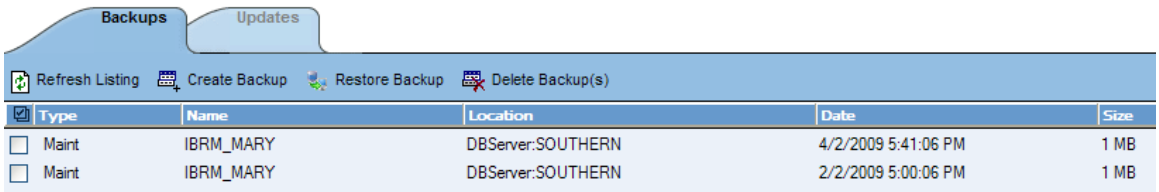


Figure 388 Database Backup Window

2. Click Create Backup. This will open the **Create Backup** window.

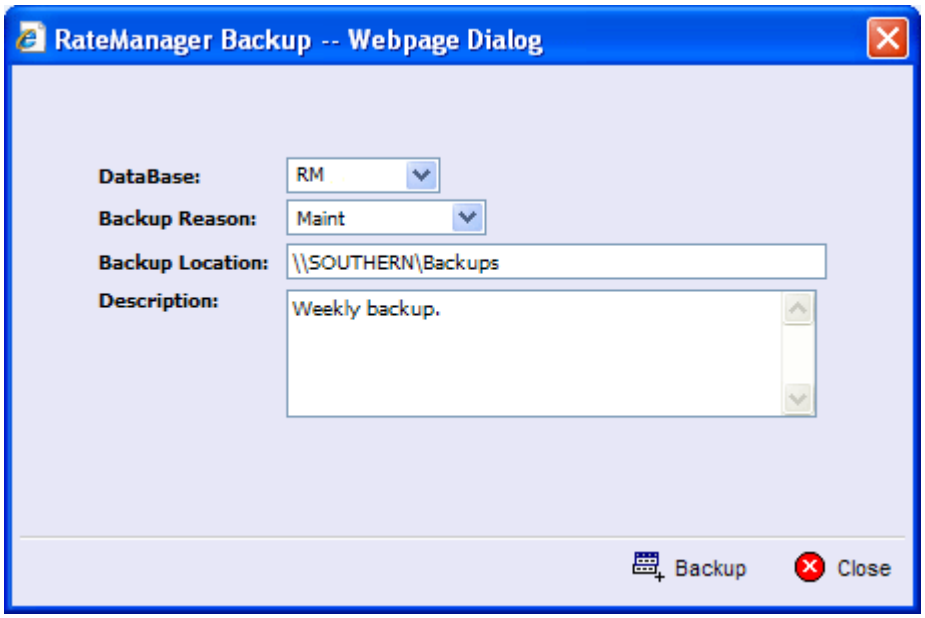


Figure 389 Creating a Backup

3. Select the database you want to backup, either **security** or **rm** (RateManager). When creating a backup to send to Oracle Insurance, select your **rm** database. The Name on the screen will default to the actual name of the database in SQL Server.
4. Select a reason for the backup, either **Maint** (maintenance) or **Error**.
5. Enter a location where the backup should be stored. This location should be a network share.
6. Click Backup to start the backup process.
7. You will be informed when the backup operation is complete. Your backup should be listed on the backups tab. If your backup is not listed, click the Refresh Listing to refresh the screen.

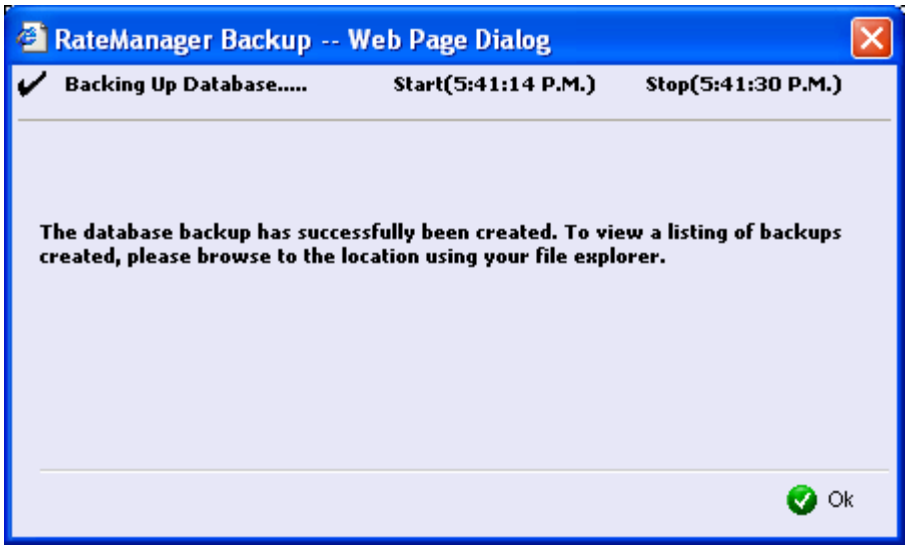


Figure 390 Successful Back Up Message

8. Once the backup is complete, you can use Explorer to browse to the backup location you entered in Step 6. Sort the listing by Date Modified to quickly find the backup you just created.

9. Oracle Insurance Support will instruct you how to handle the database handoff.

Deleting a Backup

If there's a backup that you no longer need, you can delete it. Highlight the backup you want to remove. Click Delete Backup(s). A warning message will be displayed. Click **OK** to remove the backup or **Cancel** to return to the previous screen.

Restoring a Backup

1. If there's a backup that needs to be restored, highlight the backup you want to restore and click Restore Backup. A warning message will be displayed.

NOTE	If you require assistance or are unsure of whether or not to restore a backup, please log a Service Request using My Oracle Support at http://metalink.oracle.com.

Figure 391 Restore Warning Message

2. Click Restore to restore the backup or Close to return to the previous screen.

Updates

The Updates tab lists all the available database updates for this version of RateManager. From this tab you can view the update script or execute the update. Updates cannot be deleted.

NOTE	Only a database owner can perform updates. If the Updates tab or any execute buttons are not visible, you do not have access to the database.

Running or Viewing Updates

Database updates can be done on the IB_CLIENT database and the IBRM database. If you log into RateManager and Tools is the only option, you must perform a database update.

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

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

NOTE	It is strongly recommended that database updates be performed in RateManager.

1. Navigate to the **Backups** tab.
2. Click the **Updates** tab. Select the database you want to view from the **Show updates for** drop down. The database updates will be listed. The last column, the **Status** column, will show you which update is the **Current** one installed.

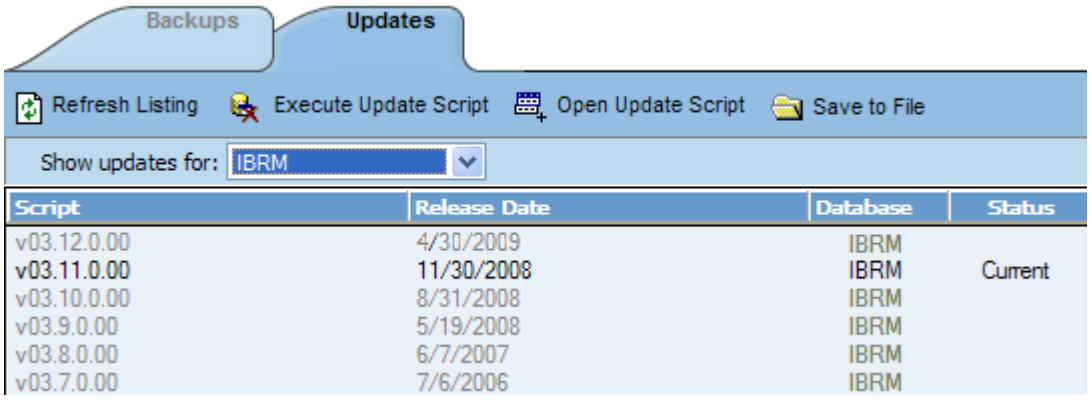


Figure 392 Available Updates

3. There are two ways to execute an update:
    a. **Directly in RateManager:** This is recommended way to update a database. Highlight the update you want to run. Click Execute Update Script. A warning message will be displayed. Click **OK** to run the update or **Cancel** to return to the previous screen. Do this for both the IBRM database and the IB_CLIENT database.
    b. **Use Query Analyzer:** *This method should be performed by a database administrator*. You must have access to the SQL Server instance where the RateManager databases are located. No warning message will be displayed if you execute scripts in the wrong order. You must know the name of the databases you are updating. If you are unsure, do not use this method.
        i. In RateManager, highlight the update you want to run. If you are going from a much lower version of RateManager, you may have to save multiple files for each database.
        ii. Click Save to File. Your computers dialogue box will be displayed. **Save** the file to a location of your choice. For IBRM scripts, it is recommended that you rename the file to usp_IBRM_R0(version number).sql. For example the V3.10 update would be: usp_IBRM_R0310.00.sql. For IB_CLIENT scripts, it is recommended that you rename the file to usp_IB_CLIENT_R0(version number).sql. For example the V3.10 update would be: usp_IB_CLIENT_R0310.00.sql.
        iii. Open Query Analyzer in SQL Server.
        iv. Open up the DB script updates from the download file. You can open in any program you want, such as Notepad.
        v. Select the IB_CLIENT database. Create a new query.
        vi. Copy the DB script you opened to the query screen.
        vii. Execute the script. Any messages will be displayed in the lower portion of the screen. Fix any errors before you continue.
        viii. Updates must be run in sequential order.
        ix. Do the same for the RM database.
        x. After the scripts have been run, return to RateManager. Click **Refresh Listing**. The status should show current and the full RateManager menu should be displayed.

For more information, please see the Oracle Insurance IBRU Installation Guide.

Running updates in a non-sequential order may result in severe database errors.

NOTE	Some warning messages may be displayed, i.e.: “Cannot add rows to sysdepends for the current stored procedure” This is normal and can be disregarded.

4. To view the update script prior to execution, highlight the update you want to view. Click Open Update Script. The update script will be displayed in a separate screen.

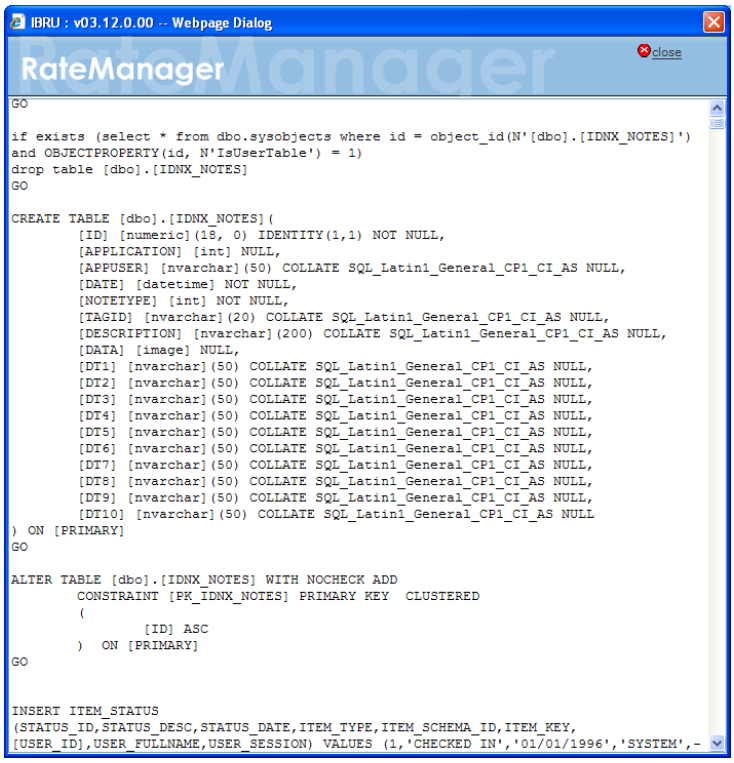


Figure 393 Script Viewer

Imports

The Imports screen allows you to import all elements related to a program including the following:

- Global Input Variables
- Global Result Variables
- Local and Global Mapped Variables
- Local and Global Calculated Variables
- Local and Global Algorithms
- Sequencing

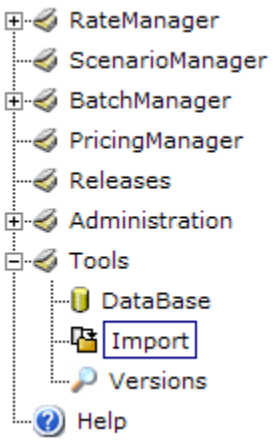
- Program Versioning
- Categories

Import can only create a new program, with a new program ID. You will not be able to restore over an existing program for safety reasons. You can delete the incorrect program and import the correct program.

An import screen will let you view all exported programs and give you the option to either process immediately or in batch.

Navigating to Imports

1. From the menu tree, click **Tools** and then click **Import**.



2. This will open the **Imports** window.

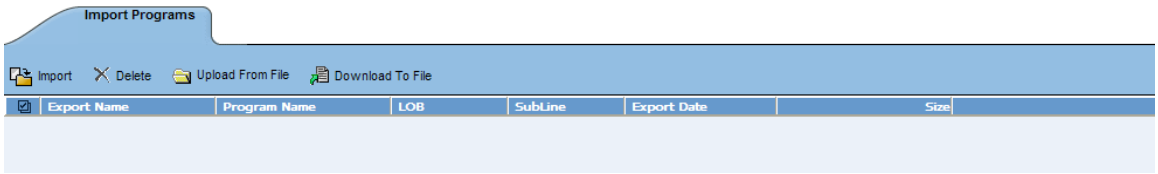


Figure 394 Imports

The Import screen will list program exports ready for import.

Export Name: The new name of the exported file. This name cannot be changed.

Program Name: The original name of the exported file.

LOB: (Line of Business) – The line of business where this file was exported from.

SubLine: The subline that this program came from.

Export Date: The date the file was exported.

Size: The size of the file.

Right Click Menu

A right click menu is available for exported files.

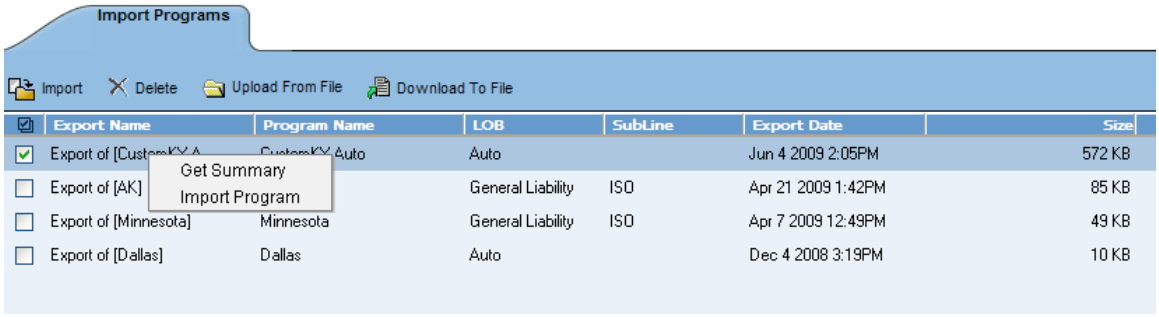


Figure 395 Right Click Menu for Import

The right click menu contains:

Get Summary: Pulls up the summary page from the program.

Import Program: Allows you to launch the import wizard.

Import Wizard

The Import Wizard allows you to import programs into RateManager. The Import will be into the same line of business that the program has been exported from. This is done automatically and you do not need to make any selections.

Launching the Import Wizard

To Import a program, select an export program from the list. If no export programs are listed, you can upload from a file or return to the folder and export one. Click the Import button. The wizard will launch in a separate window.

NOTE	The Import Wizard can be launched from two places. Use either the import button, or right click and select Import Program.

Import Wizard Screen 1 – Welcome

The welcome screen gives you information about the import functionality and prompts you to backup the database before executing the import. A backup is strictly for safety reasons, and while not required, it is recommended.

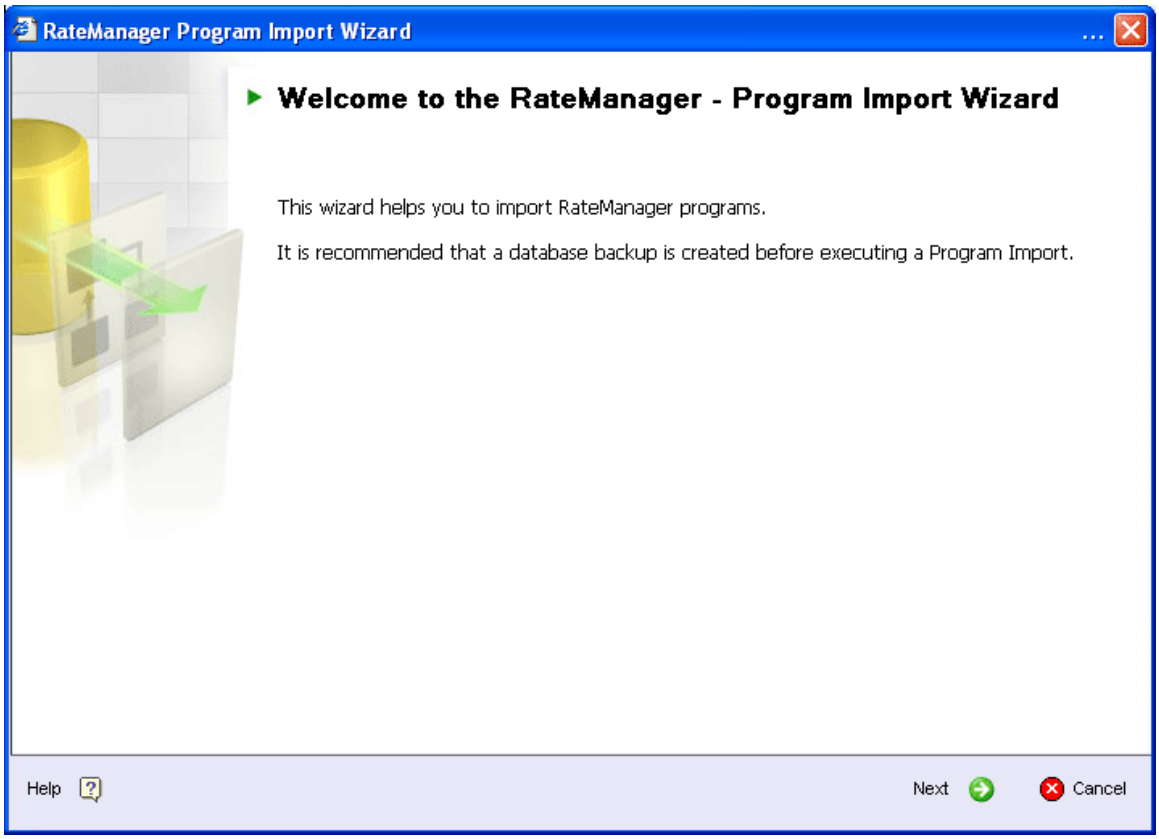


Figure 396 Import Wizard, Screen 1

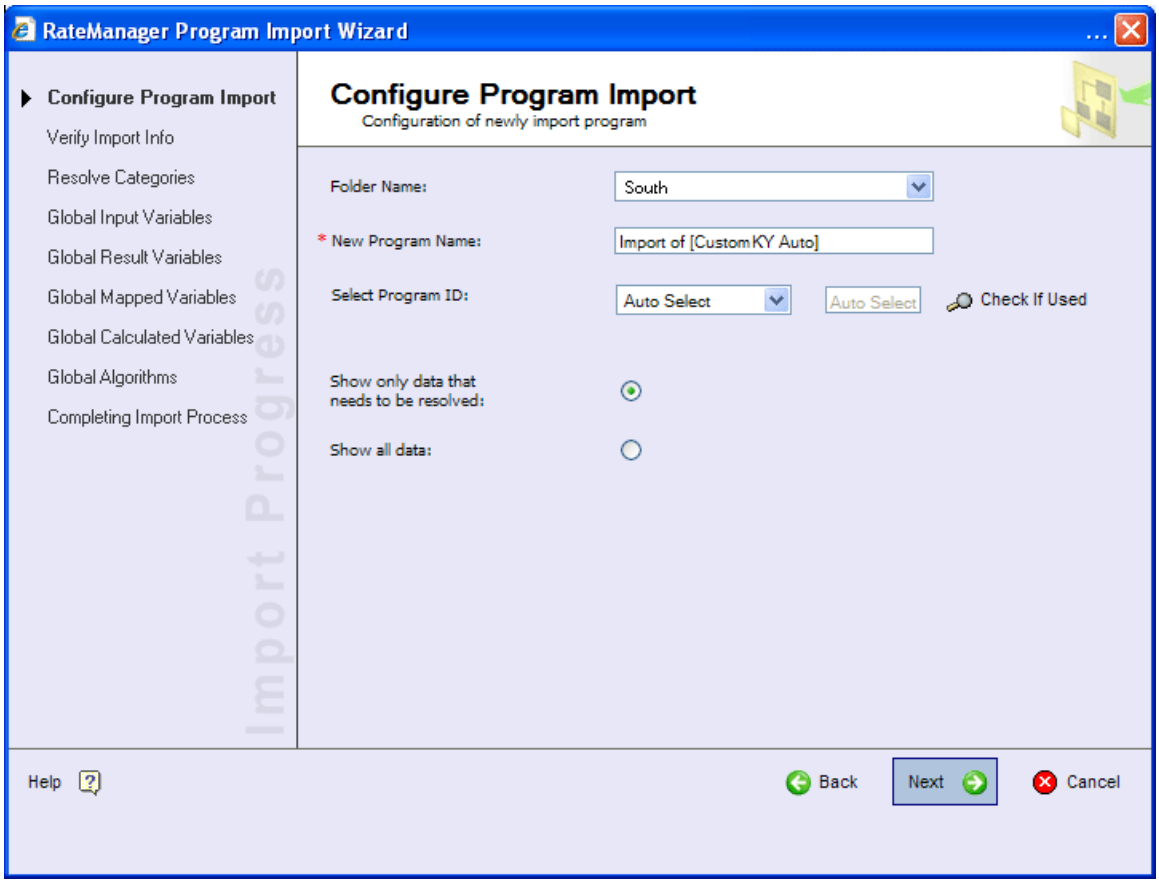
Click Next to continue.

NOTE	At any time, you can click the Cancel button to cancel out of the wizard, Click the Help button for the help screen.

Import Wizard Screen 2 – Configure Program Import

The Configure Program Import screen allows you to enter in a name for the import and select the folder where the import can be brought into. You also can choose whether or not you want to see every screens progress or only the issues that need to be resolved.

The left side of the screen will let you know the progress of the import process.



1. Select the folder that the program is to be imported in to.
2. Enter in a New Program Name if needed.
3. Select if you want to enter a configurable program ID number or if you want to the system to auto select one for you. You can check if the ID is used or available by entering your program ID and clicking the Check if used button. An answer will be returned to you immediately.
4. Next you can choose:
    - If you want the import wizard to proceed from this screen and **only** stop on items that need to be resolved.
    - If you want the import wizard to proceed from this screen and stop on **every** screen that has applicable variables, regardless if the variables and/or algorithms need to be resolved.
5. Click Next to continue.

Import Wizard Screen 3 – Verify Information

The Verify Information screen is a summary of the program to be imported, and the naming conventions.

This is the same information you can get by right clicking on the Export Program name and selecting **Get Summary**.

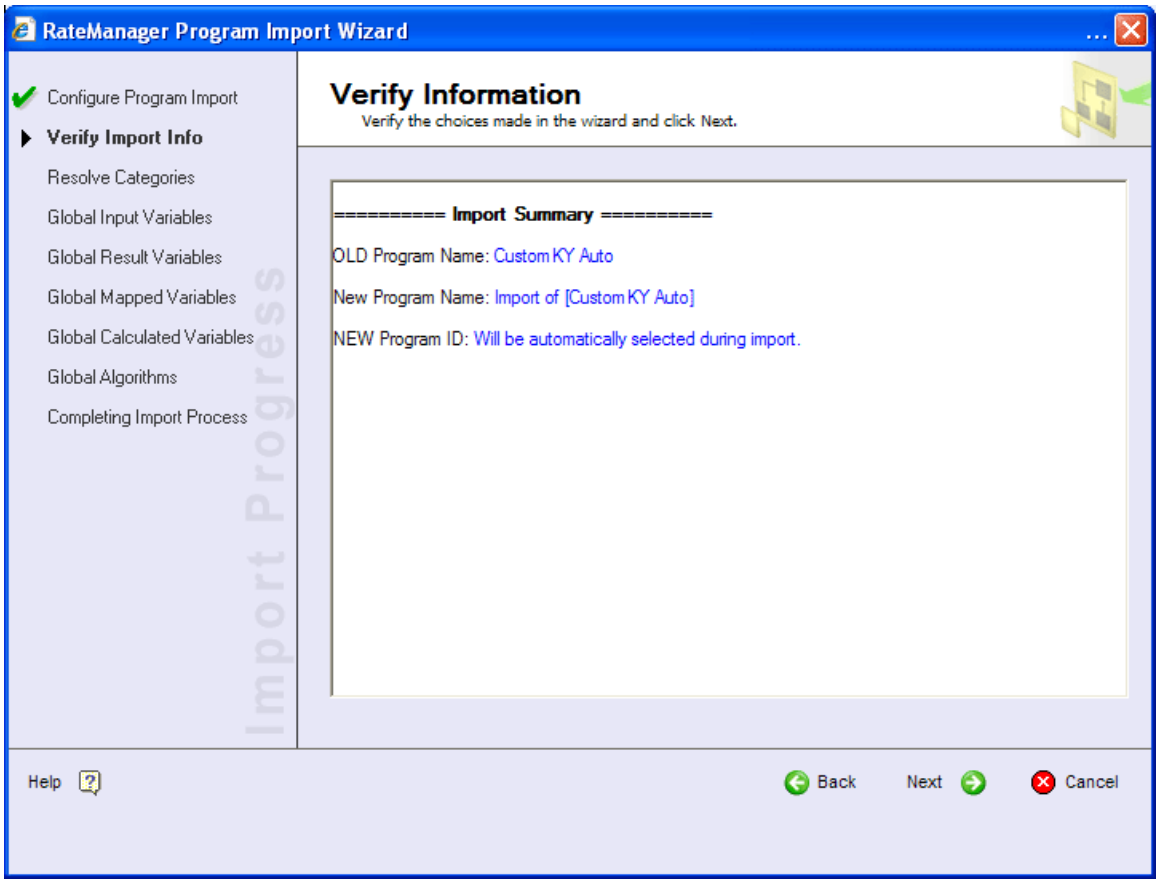


Figure 397 Import Summary Screen

4. Verify the data before continuing with the import. This screen is the last place you will be able to go backwards and make corrections before the import commences.

5. Click Next to continue.

NOTE	Throughout the Import: A black arrow indicates the current step in the import progress A green checkmark indicates that the step has been completed.

Import Wizard Screen 4 – Resolving Categories

If you have selected to stop or if an issue has risen, then the Resolving Categories screen will be displayed.

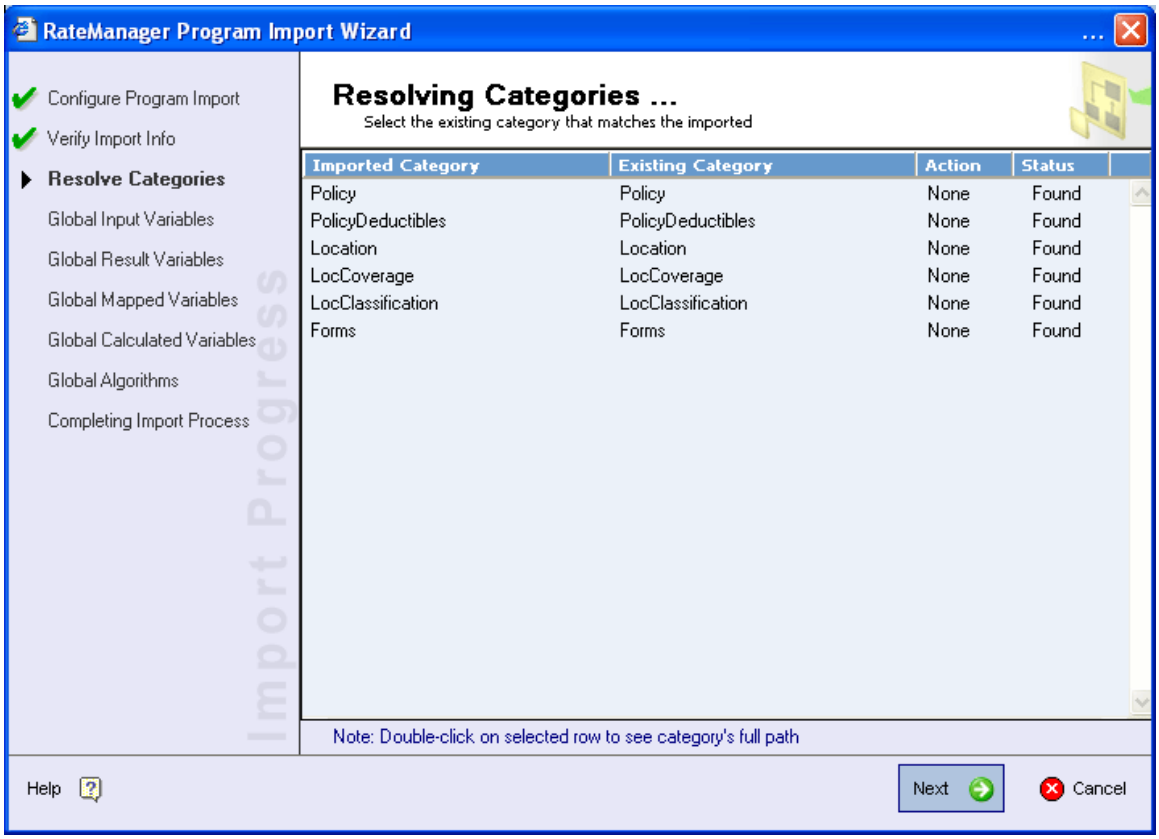


Figure 398 Import Wizard Resolving Categories

Category Rules:

- If a category does not exist, the system will prompt you to create it.
- If you would like to map an existing imported category to a different category, you will be able to select from a list of existing categories via a category drop-down.

- Valid Statuses:
  Not Found: If an imported category is not found in the existing database the status will be “Not Found”
  Found: If an imported category is found in the existing database the status will be “Found”

- Valid Actions:
  Create: If the user would like to create a new category the action shall read “Create”
  Replace: If the user would like to replace an imported category with an existing category the action shall read “Replace”
  None: There is no action taken, which is the default when a category is found.

6. After resolving any issues, click Next to continue.

Import Wizard Screen 5 through Screen 9

Screens 5 through 9 all function in the same way, only stopping when an issue arises. In order to continue, the issue must be resolved.

- Screen 5 – Global Mapped Variables
- Screen 6 – Global Algorithms
- Screen 7 – Global Inputs
- Screen 8 – Global Result Variables
- Screen 9 – Global Calculated Variables

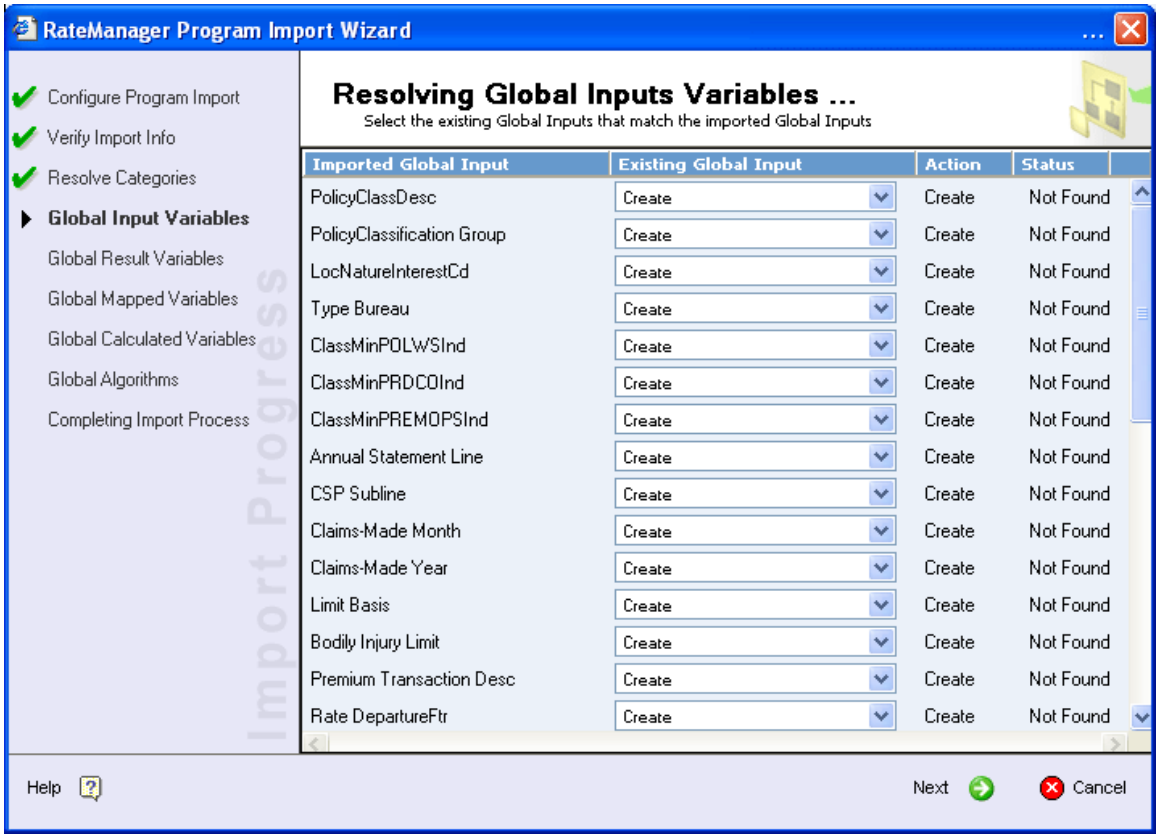


Figure 399 Resolving Issues on the Import Wizard

Screens 5 through 9 have the same statuses and actions.

- Valid Statuses:

  Not Found: If an imported Global Variable or Algorithm is not found in the existing database the status will be “Not Found”

  Found: If an imported Global Variable or Algorithm is found in the existing database the status will be “Found”

- Valid Actions:

  Create: If the user would like to create a new Global Variable or Algorithm the action shall read “Create”

  Replace: If the user would like to replace an imported Global Variable or Algorithm with an existing Global Variable or Algorithm the action shall read “Replace”

  None: There is no action taken, which is the default when a Global Variable or Algorithm is found.

Import Wizard Page 10 – Completing Import Process

The Completing Import Process screen allows you to choose if you want the last part of the import process to be performed immediately or in batch. You will be given an estimate of how long it will take to complete at the top of the screen.

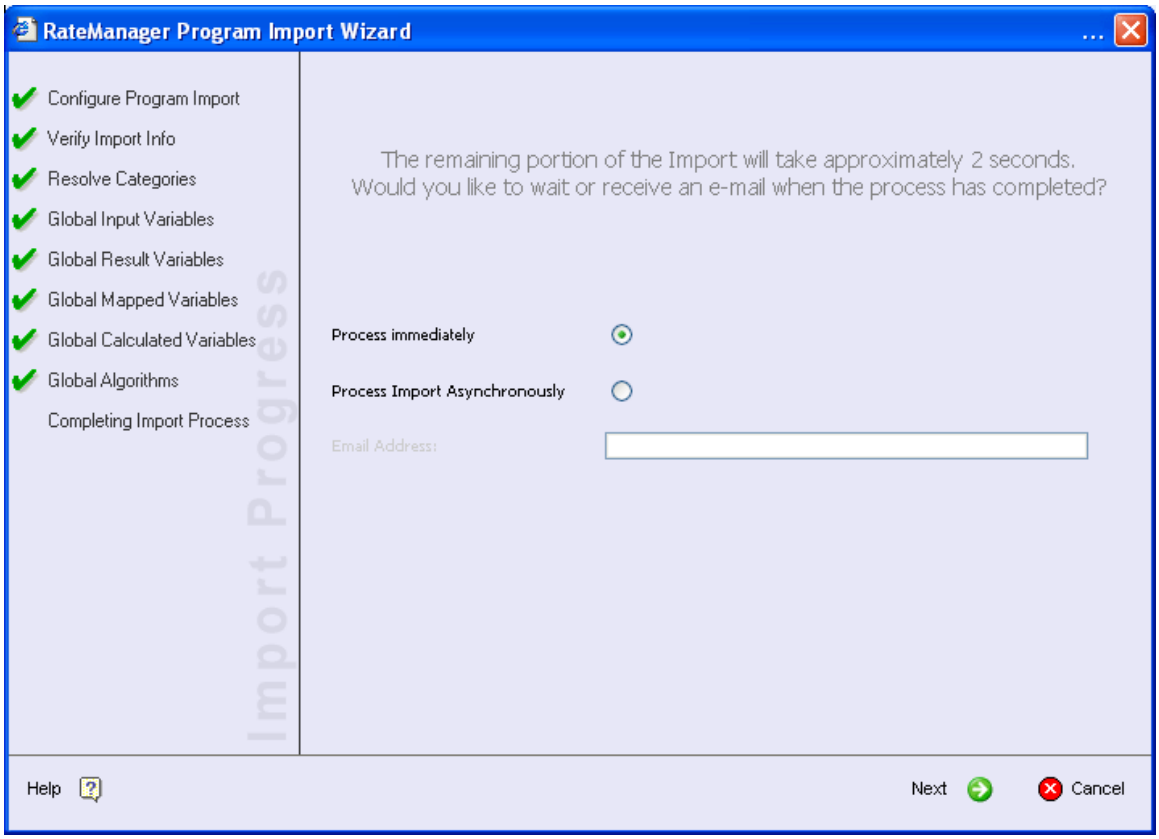


Figure 400 Completing the Import Process

7. Select how you want to proceed:

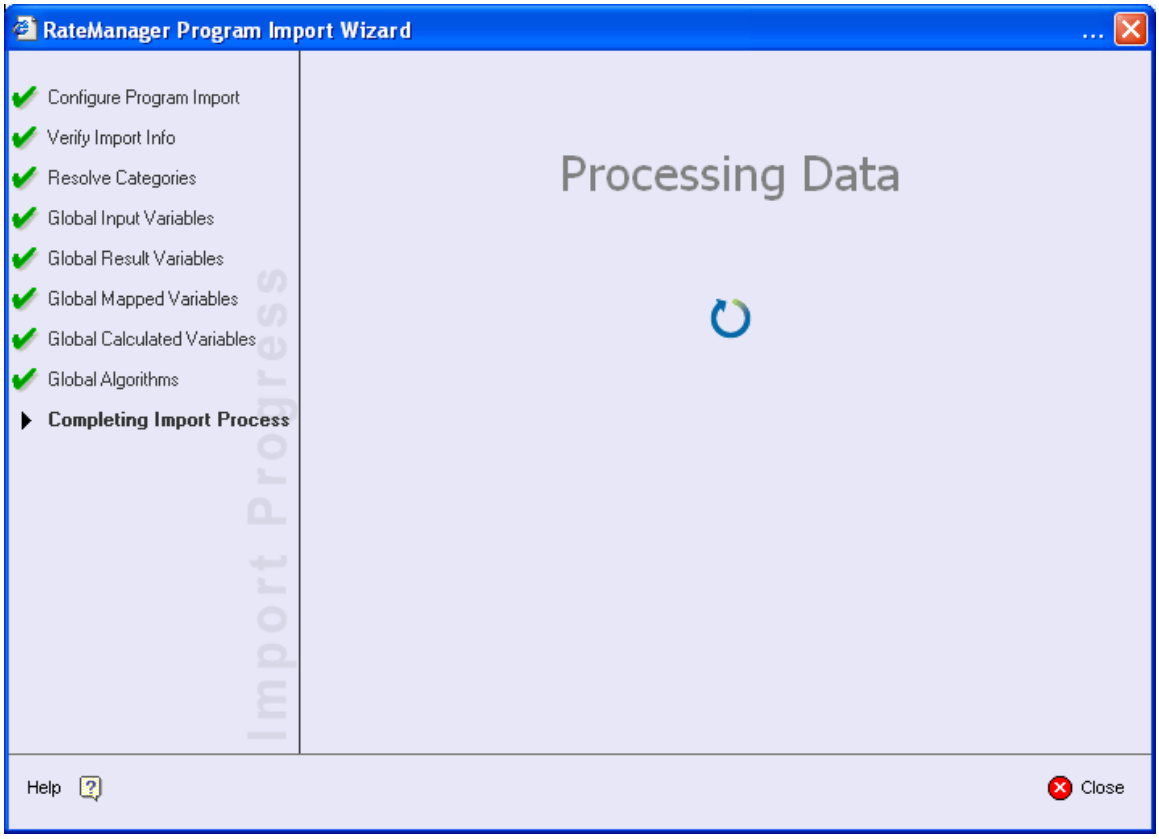
   - **Process Immediately:** You can proceed immediately. Status will be displayed on the screen while you wait.

   - **Process Import Asynchronously:**
     The user will now be able to enter an email address.
     There will receive an email when the import process is complete.
     You will be prompted to close the window and wait for an email from the system, stating that the import has completed.

8. Click Next to continue.

Import Wizard Screen 11 – Processing Immediately

For immediate processing, you will receive a processing screen.



Import Wizard Screen 12 - Process Immediately Selection

When the process is finished, you will receive a screen letting you know if the import was successful or failed.

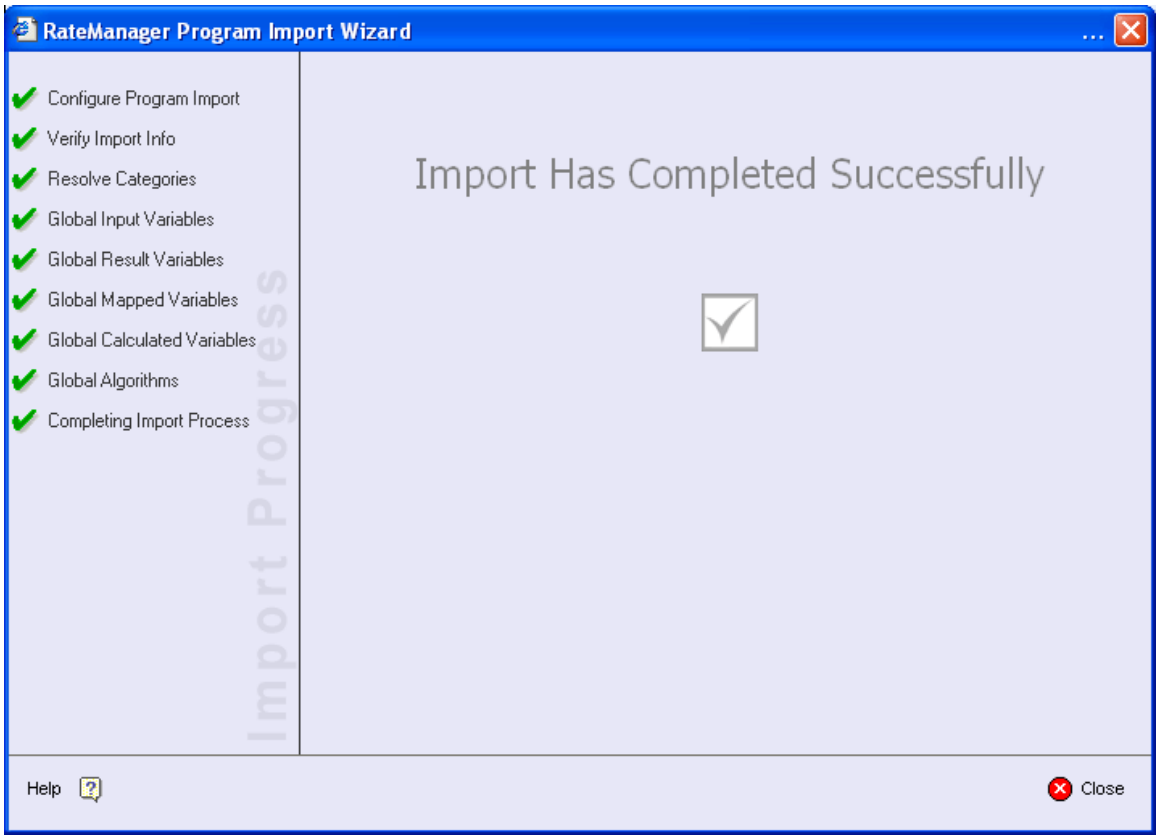


Figure 401 Successful Completion of an Import

Global Imports

When a Global Variable or Algorithm is imported inside a program, it can not been undone via the import process. By default, the import does not override any conflicting data.

There is no indication in the RateManager Global Variable or Global Algorithm listing that a Global Variable or Algorithm has been imported.

Deleting Programs

Programs can be deleted from Imports at any time.

To Delete:

1. Select the Program.
2. Click the Delete button. A warning message will be displayed.

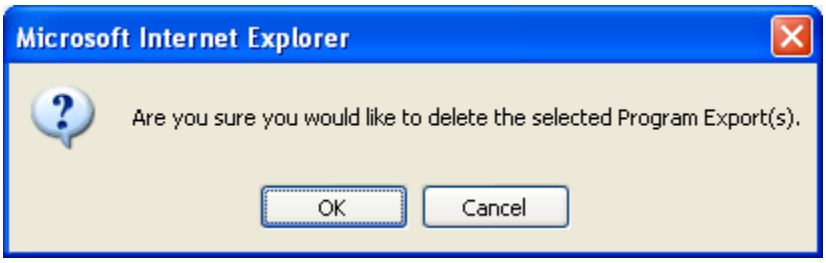


Figure 402 Deleting an Export Program Warning Message

3. Select **OK** to delete. Click Cancel if you do not want to delete this program.

Upload Files

Program files can be uploaded directly into Imports. You can upload a program export from a .pxf file. Please note that all .pxf files are encrypted.

To Upload a File:

1. Click the Upload From File button. A separate popup will be displayed.

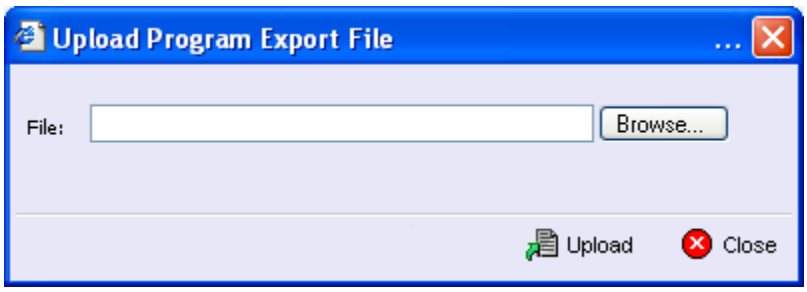


Figure 403 Uploading Program

2. Click the Browse… button to access your computers dialogue box.

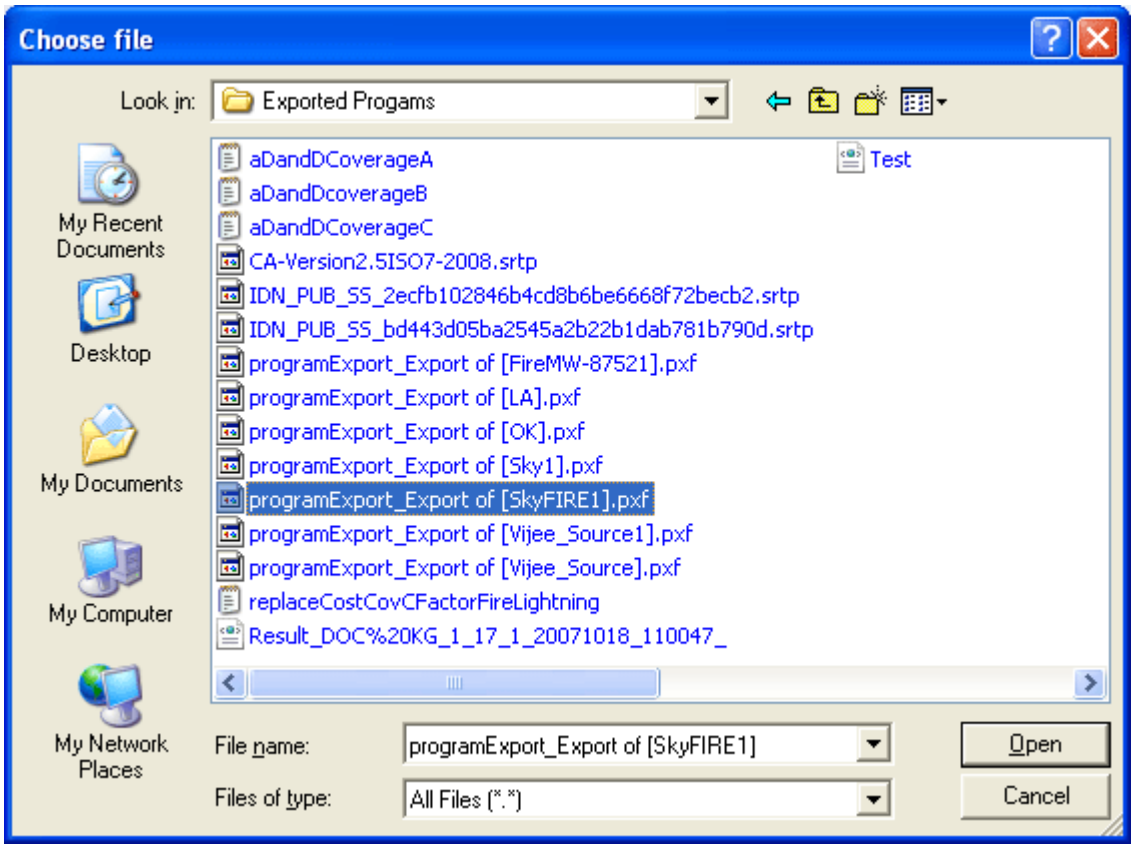


Figure 404 Selecting File To Upload

3. Select the program you want to upload and click **Save**. You will be returned to the Uploading Program box.

4. Click the **Upload** button. The process will begin.

Figure 405 File Uploading

When the program is finished uploading, the popup will close and the program will be listed on the Import Program screen.

Downloading Files

You can download a program export that is on the screen to a .pxf file on your local hard drive or network.

To Download a File:

1. Select the file you want to download.
2. Click the

button. Your computers dialogue box will be displayed.

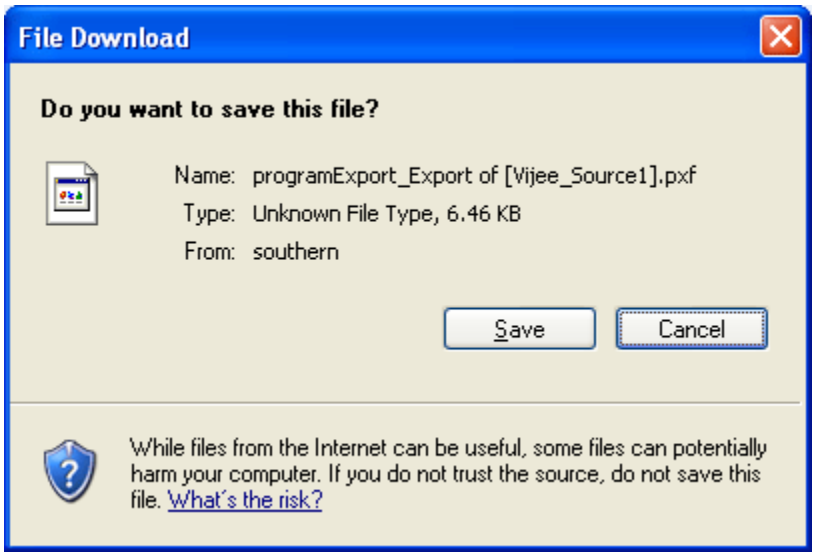


Figure 406 Downloading a Program

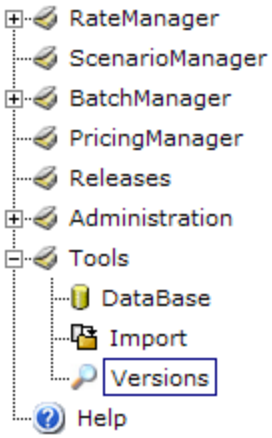
3. Click **Save** and select the folder and location where you want to save the program.

Viewing Versions

The Version option in the Tools section of RateManager allows an administrator to view the version information for the current system.

To View a Version

1. From the menu tree, click **Tools** and then click **Versions**.



2. This will open the **Version Listing** window.

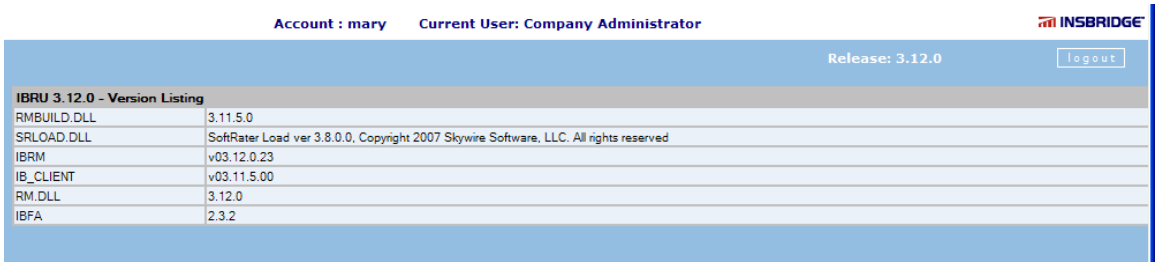


Figure 407 Version Listing

3. The latest version information including RM schemas, IB Client schemas and build will be displayed.

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Support

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

Appendix A

Changing Your Internet Explorer Settings

RateManager is a web application that requires certain permissions and controls in order to properly interact with an end user's desktop and file system. These steps detail how to change your Internet Explorer settings.

NOTE	If you use RateManager 3.x and Internet Explorer 7, the ActiveX Control will need to be registered for the new Internet Explorer 7 browser. Please request the Insbridge Internet Explorer 7 Active X registration executable, **RateManager_IE7.exe,** from Oracle Insurance support. See IE7 RateManager ActiveX Control Updates for manual update instructions.

To Change Your Internet Explorer Settings

NOTE	The steps below outline how to change your security settings in Internet Explorer 6.0. The steps are similar in Internet Explorer 5.5. If you are unable to change your security settings, ask your system administrator to change them for you.

1. From an Internet Explorer browser, select **Tools➢Internet Options...** from the file menu.

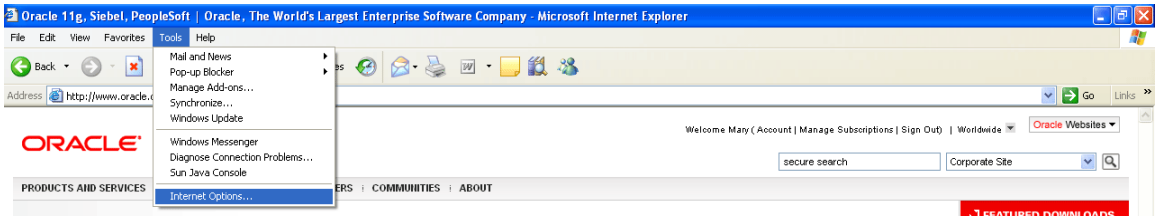


Figure 408 Changing Internet Explorer Settings

2. This will open the **Internet Options** window. Select the **Security** tab and then click the **Local Intranet** icon. MCSAT Menu Control

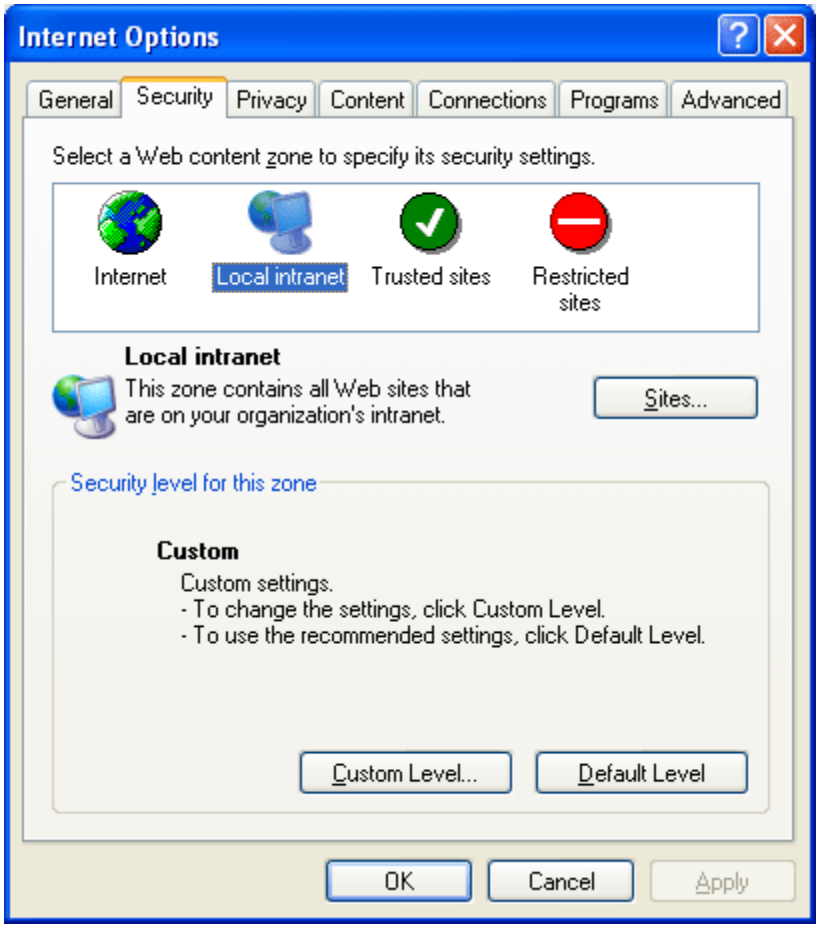


Figure 409 Setting Internet Options, Security

3. From here, you can do one of two things.

   - You can change the security level to **Medium, Medium-Low** or **Low** using the slider. If the slider does not show, click Default Level. If you choose this option, go to step 5. Also, see How Security Levels Affect RateManager for more information.
   - You can set the options manually. If you choose this option, continue with step 4.

4. To set the options manually, click Custom Level... This will open the **Security Settings** window.

5. Change the option "**Initialize and script ActiveX controls not marked as safe**" from Disable to **Prompt** or **Enable**. Select OK when you are finished.

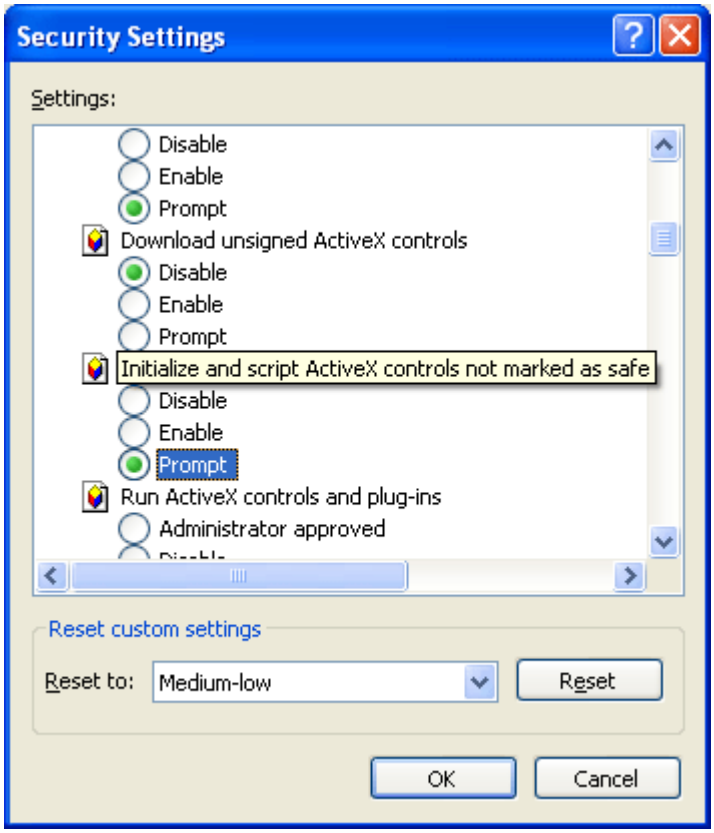


Figure 410 Setting Security Settings

6. Click the **Advanced** tab. Remove the checkmark, if there, next to **"Reuse windows for launching shortcuts".** Select OK when you are finished.

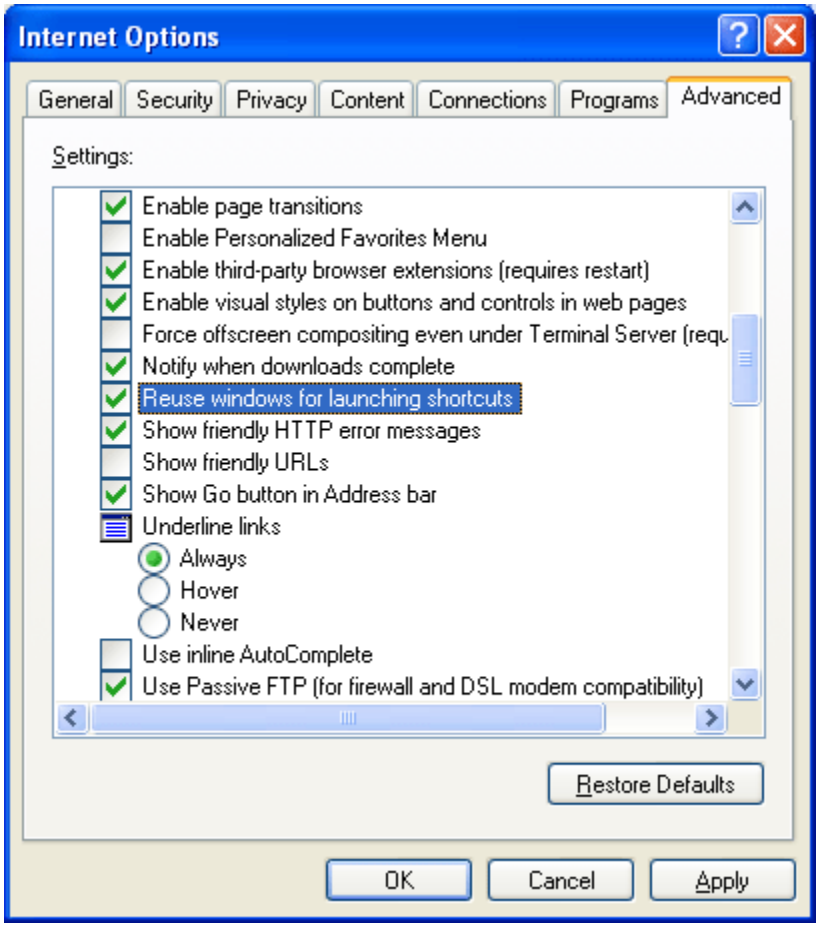


Figure 411 Setting Advanced Security Options

How Security Levels Affect RateManager

Different security levels affect how RateManager functions. The information below outlines how the basic security levels **(High, Medium, Medium-Low** and **Low)** affect RateManager.

High RateManager will not function properly when security is set to **High.** Security must be **Medium** or lower.

Medium In ScenarioManager, the user will only be able to rate files that are located on a network share, i.e. the file path must be of the form "\\server\folder\file.xml". Files located on the user's machine or on a mapped network drive are not available. This is because RateManager uses an ActiveX object to access the user's file system and the **Medium** security level disables some ActiveX functionality. When rating a file, ScenarioManager will prompt the user to get the file from the server. The user must click OK in order to rate the file.

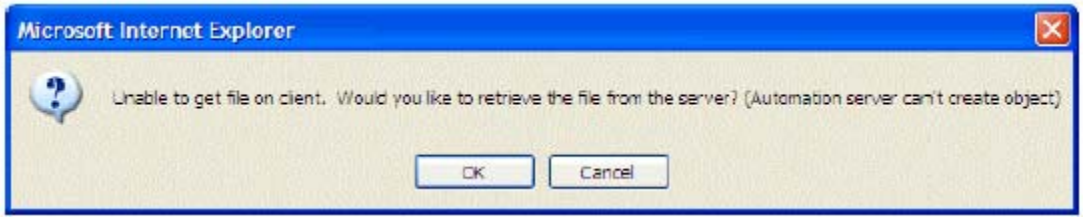


Figure 412 Warning Message for Medium Security Setting

Medium-Low RateManager will function the same as it does with the security setting of **Medium.**

Low In ScenarioManager, the user will be able to rate files located on their machine, a mapped network drive or a network share.

Warning	In all cases Low security presents no prompt to the user, and all macros are allowed to run. When macro security is set to Low, certificates of trust attached to macros are not examined by the system and are not presented to the user for acceptance. Since the user is never prompted to accept or reject these certificates, they are not posted to the trusted Trust Publishers store for Office applications. If you use the **Low** setting, you increase your vulnerability even if you clear the **Trust all installed add-ins and templates** checkbox. **Note:** If the security setting is set to **Low**, Office applications will not warn you before running a macro, therefore, all macros are run without user intervention. Because of the potential security risk, Microsoft does not recommend using the **Low** setting. With no warnings, controls can be initialized or scripted regardless of data source or scripts.

Additional Information

- In order for a user to rate a file located on their machine or on a mapped network drive, either the security level must be changed to **Low,** or the security option **"Initialize and script ActiveX controls not marked as safe"** must be set to **Prompt** or **Enable.** See Internet Explorer Settings for more information.
- If the security option **"Initialize and script ActiveX controls not marked as safe"** is set to **Prompt,** the user will receive the following message when they try to rate a file through ScenarioManager.

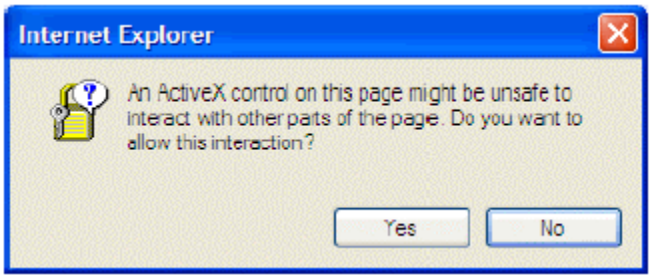


Figure 413 Warning Message for Active X Controls

Clicking **Yes** will allow ScenarioManager to get the file from the user's machine. Clicking **No** will prevent ScenarioManager from getting the file from the user's machine.

If a user wishes to rate a file that is located on their machine, and they click **No**, they will have to log out of RateManager and log back in, in order to be prompted again.

NOTE	You may have to close out your browser for the new settings to take effect. Close all open browser windows and then re-open.

Appendix B

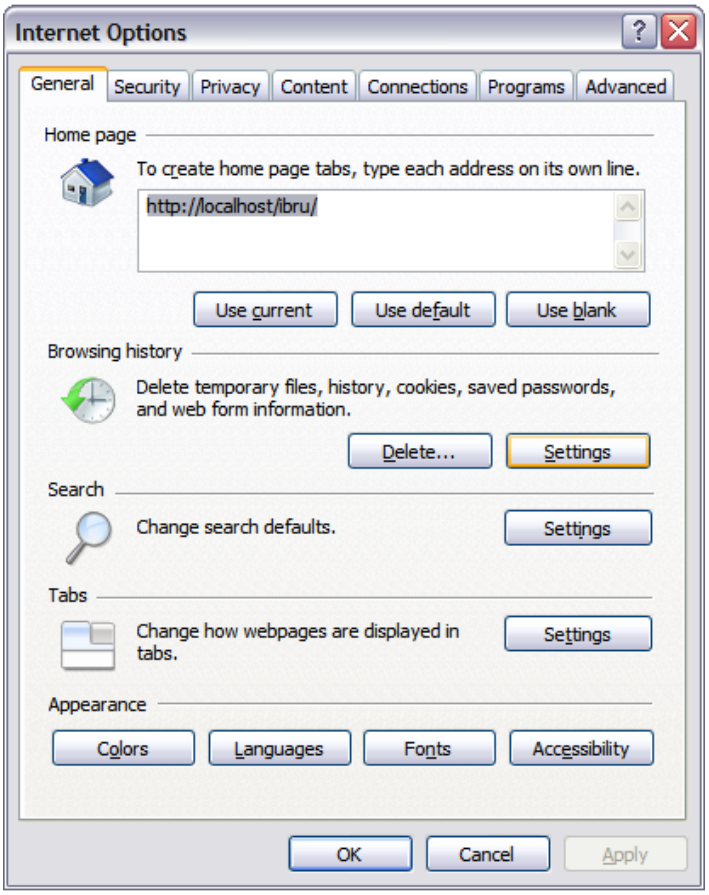
IE7 RateManager ActiveX Control Updates

If you have RateManager 3.x and are planning to upgrade to Internet Explorer 7, the ActiveX Control will need to be re-registered for the new Internet Explorer 7 browser.

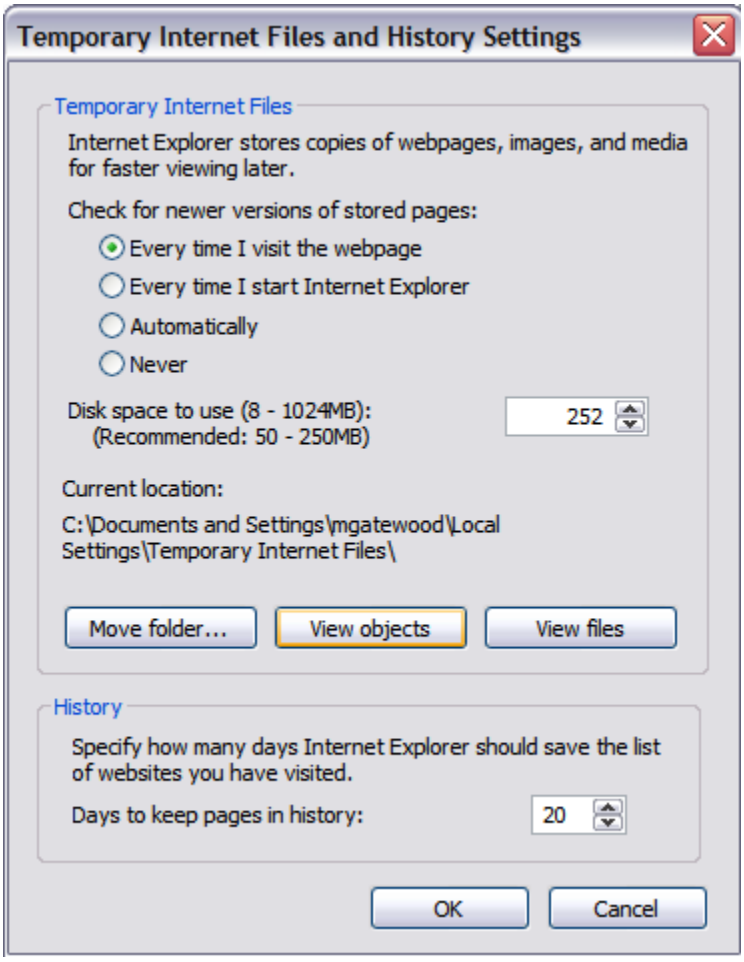
It is **recommended** that you use the Insbridge Internet Explorer 7 Active X registration executable, **RateManager_IE7.exe.** Please request this executable from Oracle Insurance support. It is possible to manually update the ActiveX Controls.

1. Open up IE7. Please ensure that you do not have any other windows or tabs open.

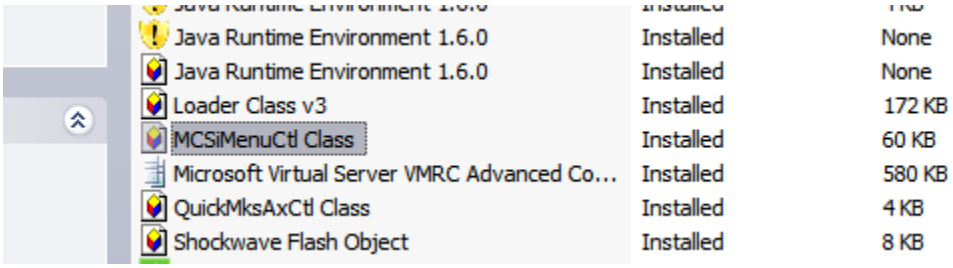
2. Browse to:
   a. Tools ➔ Interned Options
   b. General Tab
   c. Under Browsing history, select Settings



   d. Click View Objects



e. Click the **MCSiMenuCtl Class** and delete it.



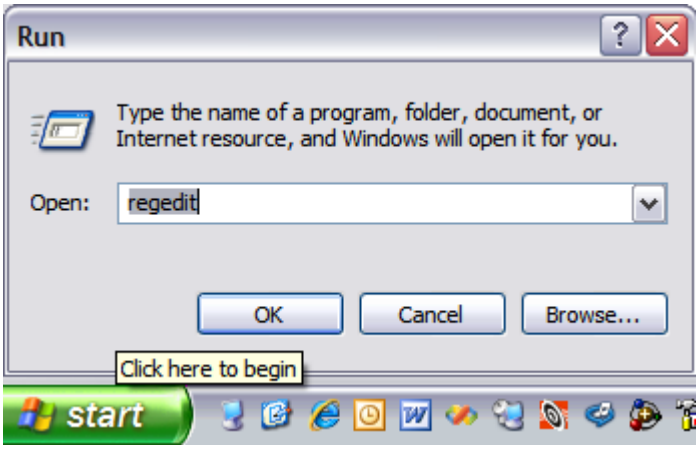
f. Close out of your **IE7** Window.

3. Now we will need to remove the IE6 control from your registry. You will have two options:

   - **Automatically:** To remove these items automatically, please execute the **RateManager_IE7.exe**. This executable is provided to you by Oracle Insurance. It is recommended that you update the registry automatically.

   - **Manually:** To manually remove the IE6 ActiveX Control from the registry, follow the instructions below:
     a. Click Start ➔ Run

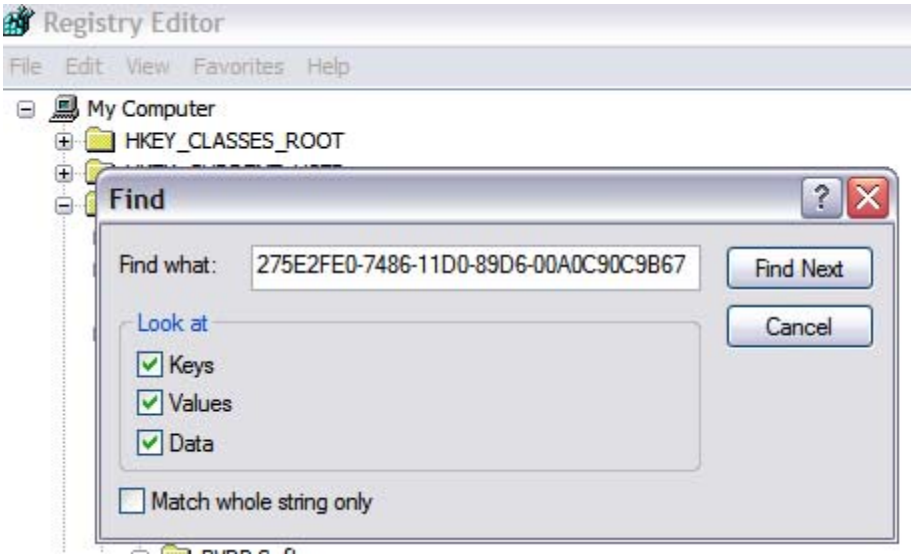
b. Type in Regedit.



c. Select the My Computer section from the tree.

d. Click Edit ➔ Find

e. Type: 275E2FE0-7486-11D0-89D6-00A0C90C9B67



f. Delete Every Key and Value that you find named: {275E2FE0-7486-11D0-89D6-00A0C90C9B67}

4. Now we will need to login to RateManager and allow the browser to register the ActiveX Control for IE7.

5. Please contact Oracle Insurance Support at support-skywire_ww@oracle.com if the control **does not** show on the screen below.

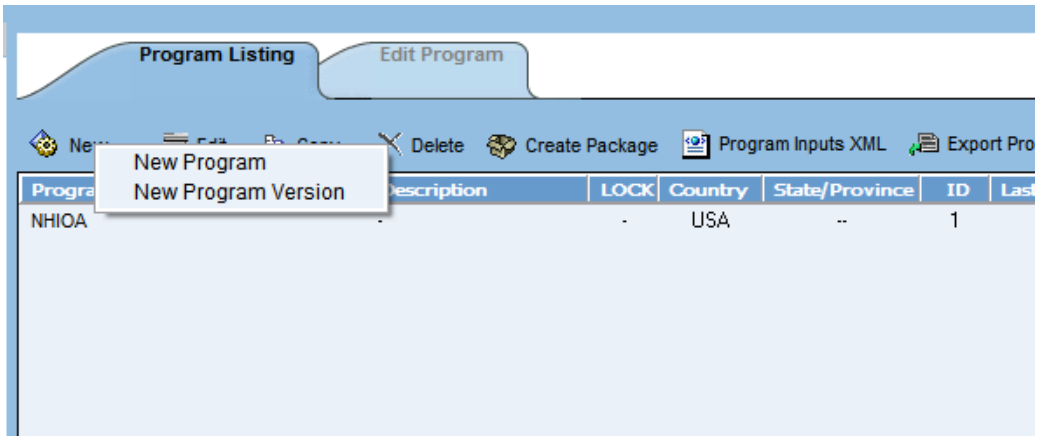


Figure 414 Setting ActiveX Controls for IE7

Appendix C

Clearing Temporary Files

Because IBRU is a web-based application, 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.

Clearing the Temp File

Open up a regular browser window, not a RateManager screen. On the top menu bar, click **Tools➤Internet Options...**

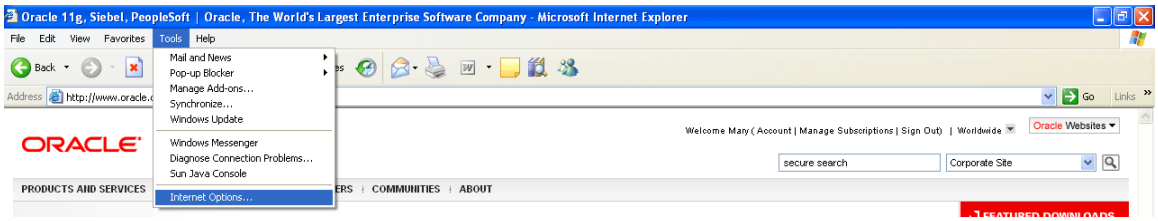
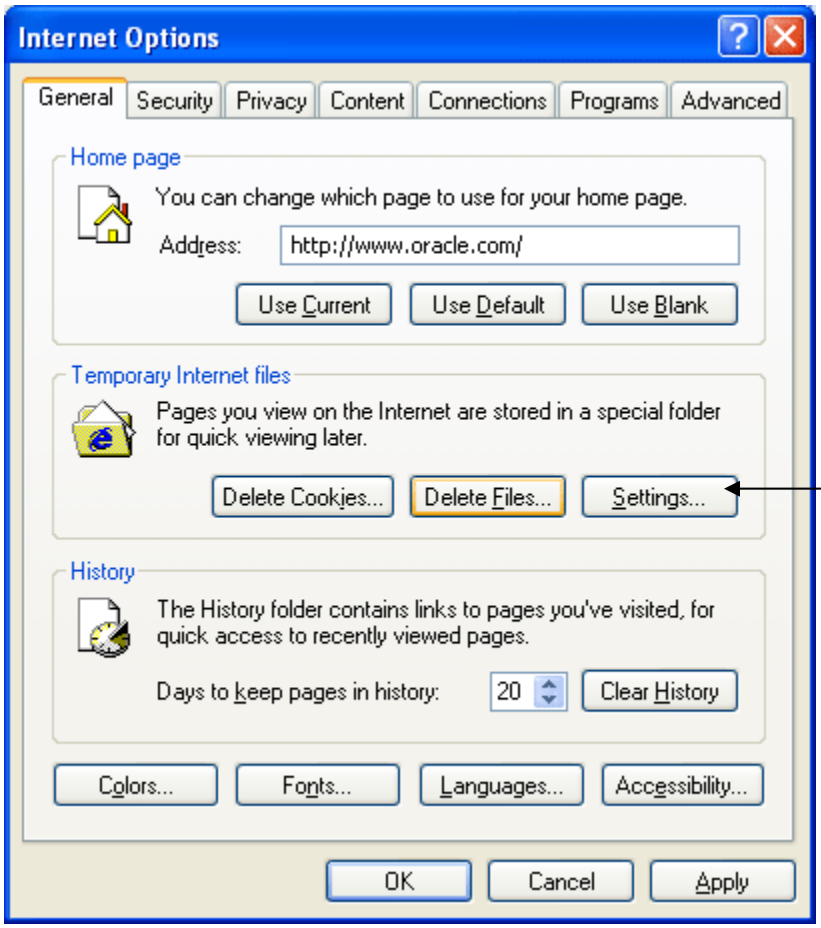


Figure 415 Browser Toolbar

Click the Delete Files button on the General Tab➤Temporary Internet Files – located in the middle section.



To view your temp files or to define your temp file settings, click the Settings button. This will open up an information screen where you can make any adjustments.

Figure 416 Delete Files

A warning message will appear.

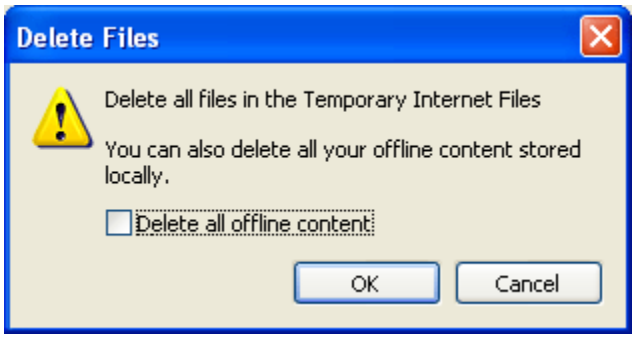


Figure 417 Temp File Warning Message

You can select to delete all offline content in addition to the temp files. This will remove any pages that may be stored. Stored pages specify that when you return to a page you viewed previously, the browser should not check to see whether the page has changed since you last viewed it.

Selecting this option can provide the most speed when browsing through pages you have already viewed.

Removing stored pages will force the browser to get the page. This may result in slower page loading. However, deleting older pages will help to make sure that you are viewing the most current version of a page.

To clear the temp file:

- Check if you want to **Delete** all offline content.
- Click **OK** to clear the temp file.
- Depending upon the amount of files that need to be deleted, this may take a few minutes. When the temp files have been removed, you will be returned to the previous page.
- Click **OK** to close the Internet Options box and continue working.

If you do not want to clear your temp file, click Cancel to return to the previous screen.

Appendix D

Failure to Display Popups

Popups are screens that automatically open when you click on a web site or a hyperlink. Popups frequently are annoying ads and many users don't want popups appearing on their system so they install popup blockers. Popup blocker programs will severely limit any type of auxiliary screen from being displayed. IBRU contains many information screens that are critical for users to view but are considered auxiliary screens by popup blocker programs.

You may not even be aware you have a popup blocker installed because popup blockers are included in newer versions of Windows including XP/SP2, many popular browser toolbars and other Internet service software.

NOTE	If at any time you are unsure how to enable popups, please contact your system administrator.

The three main popup blockers will be discussed here.

Microsoft Windows XP

If you have installed Service Pack 2, then you have a popup blocker on your Internet Explorer.

To turn it off:

Step 1. Open an Internet Explorer window.
Step 2. Click on Tools in the menu.
Step 3. Click on Internet Options.
Step 4. Click on the Privacy tab.
Step 5. Uncheck Block Popups.
Step 6. Click OK to save your changes.

This will allow popups to be displayed.

Google Toolbar

The Google Toolbar is an add-on feature for Internet Explorer.

To disable the Google popup blocker:

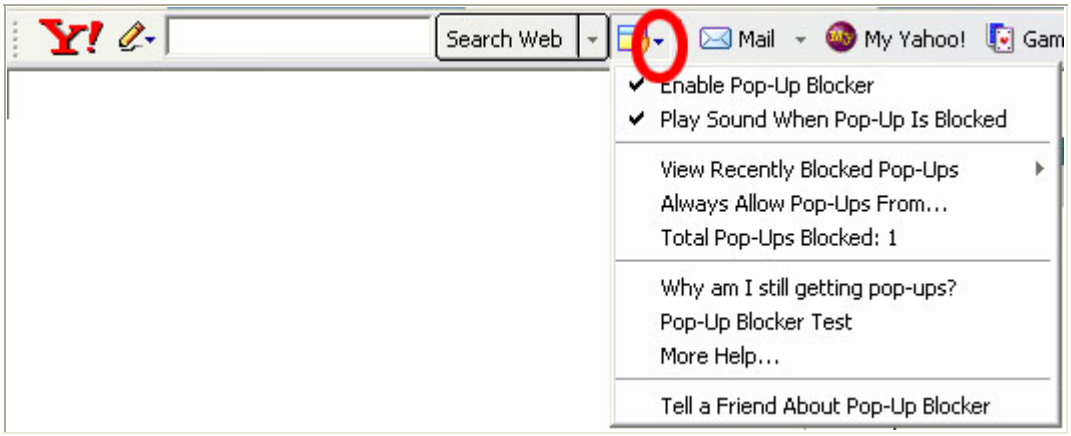
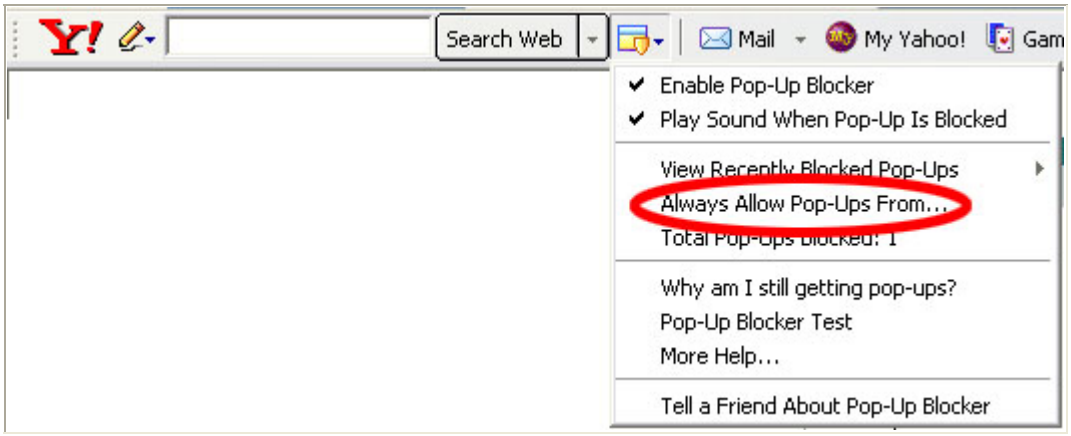
Step 1. Open an Internet Explorer window.
Step 2. Click on the Blocking Popups button.
Step 3. Select Site Popups Allowed.
Step 4. Click OK to save your changes.

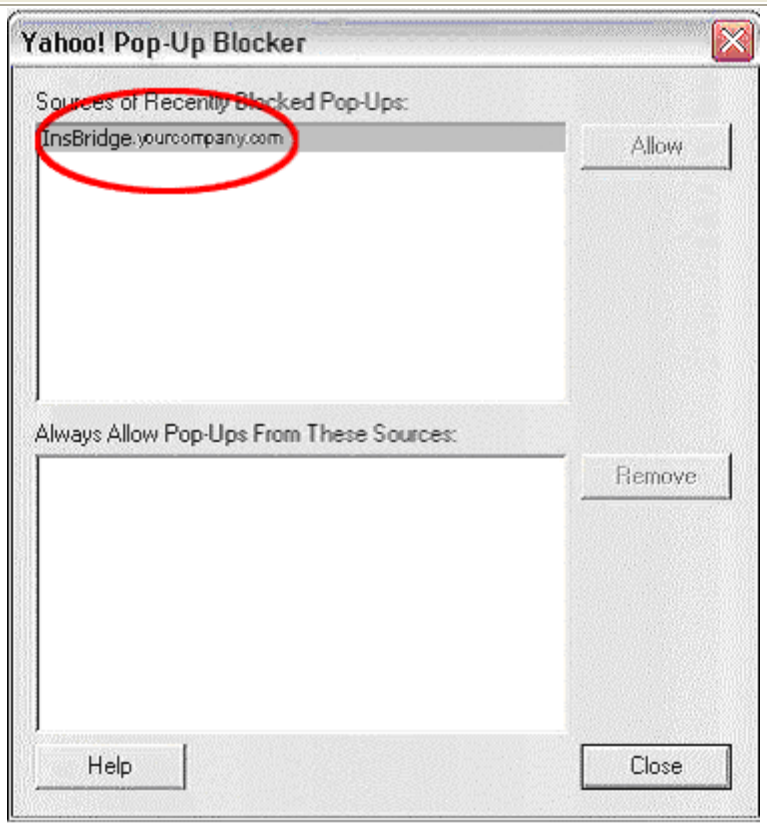
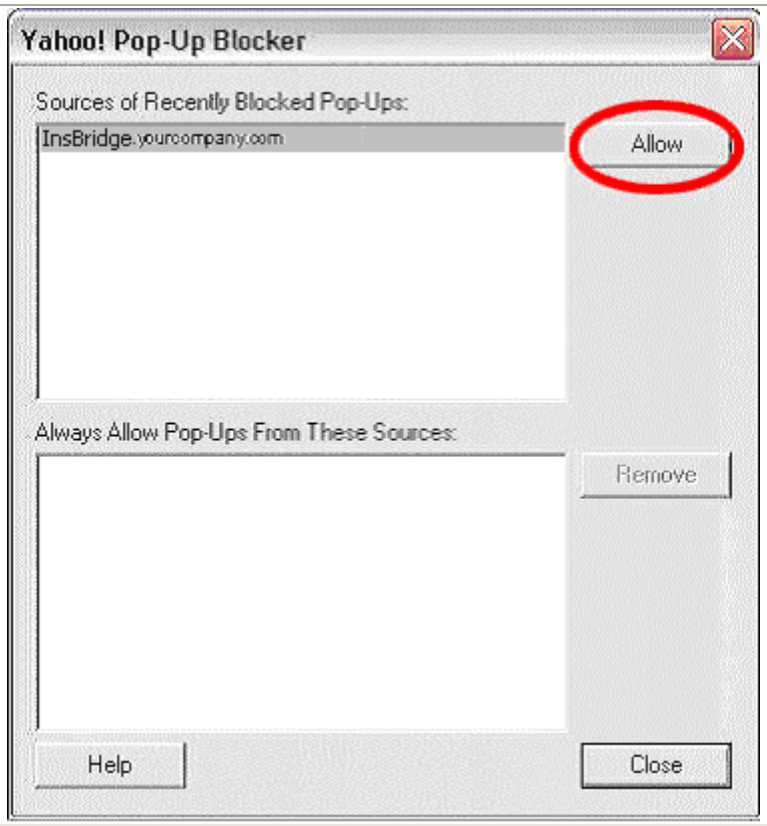
This will allow popups to be displayed.

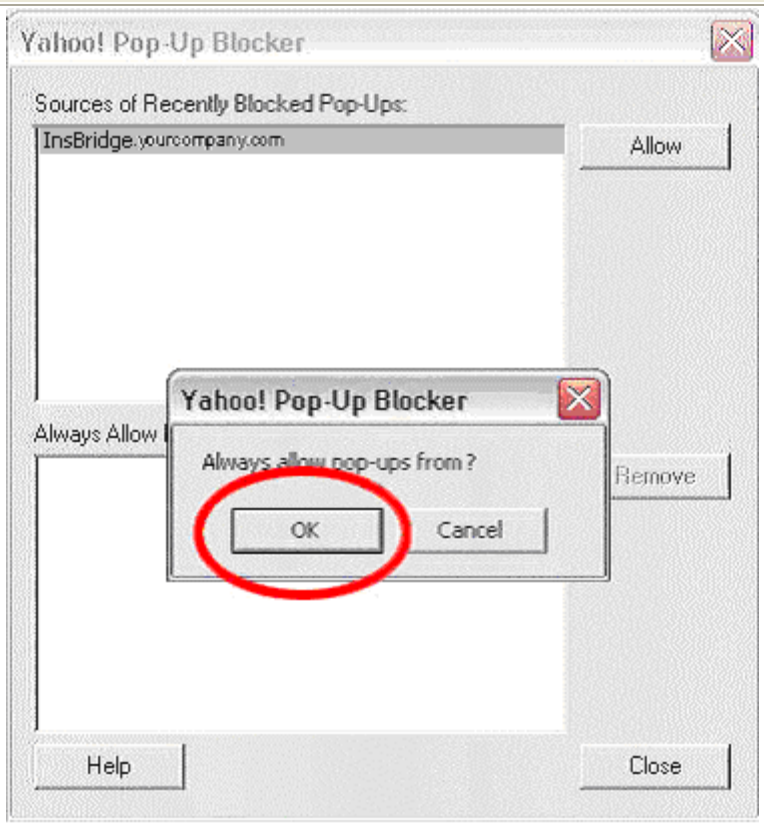
NOTE	You also can check your failed popups option and select to add Insbridge.

Yahoo toolbar

Yahoo likewise has a toolbar that is an add-on feature for Internet Explorer.

Step 1: Open an Internet Explorer window.	
Step 2: On your Yahoo toolbar, click the popup blocker option arrow. This is the down arrow beside the popup blocker icon.	
Step 3: Click on "Always Allow Popups From..."	

Step 4: Locate the Insbridge URL from the Sources of Recently Blocked Popups: list. Click on it. If you are unsure of the Insbridge Link, contact your system administrator.	
Step 5: Click Allow.	

Step 6: Click OK. This will allow Insbridge to display popups. Click Close to close the window and save your entry.	

NOTE	Internet service software, such as AOL, also includes popup blockers. As do many security programs, such as McAfee and Norton. It is recommended that you consult the manufactures instructions for disabling popup blocker.

If any of these solutions fail to produce the desired results, contact your system administrator for further assistance.

Trusted Sites

You also can add Insbridge to your Trusted Sites.

To Add Insbridge to your Trusted Sites:

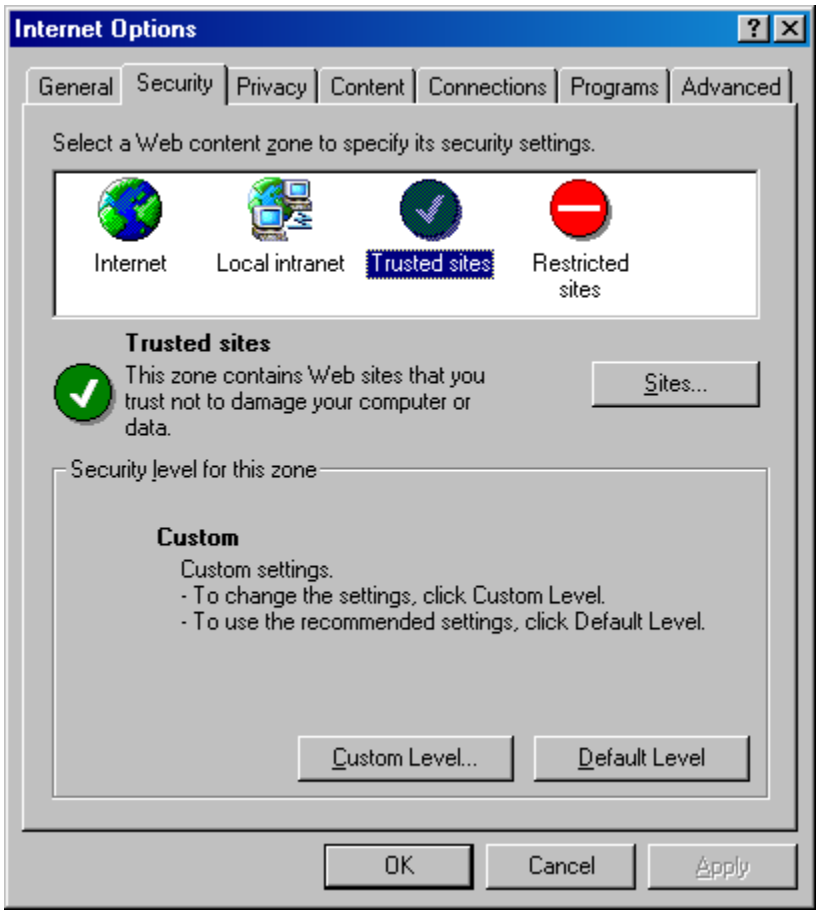
Step 1. Open an Internet Explorer window.

Step 2. Click on Tools in the menu.

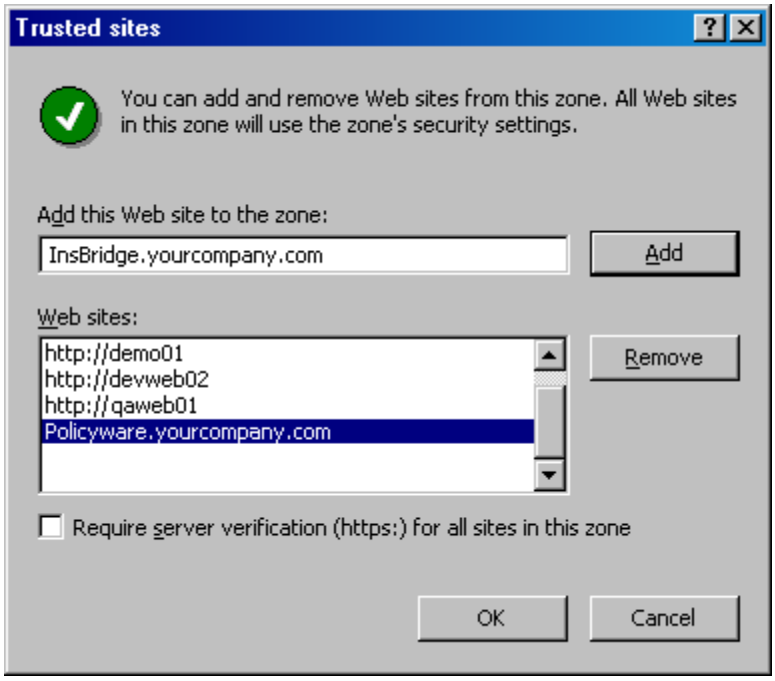
Step 3. Click on Internet Options.

Step 4. Click on the Security tab.

Step 5. Click on Trusted Sites.



Step 6. Click on the Sites button. A separate window will be displayed.



Step 7. Enter in your Insbridge site. If you do not know your Insbridge site, ask your system administrator.

Step 8. Click Add. The Insbridge site will be listed below.

Step 9. Click OK to save your selections and close the window.

This will allow auxiliary screens from Insbridge to open.

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:	The most common type of algorithm. Examples of what it can be used for are: • 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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