

Oracle Insurance

**Insbridge Rating and
Underwriting
BatchManager User
Guide**

Release 3.13

December 2009

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Oracle Insurance Insbridge Rating and Underwriting BatchManager User Guide

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Primary Authors: Mary Elizabeth Wiger

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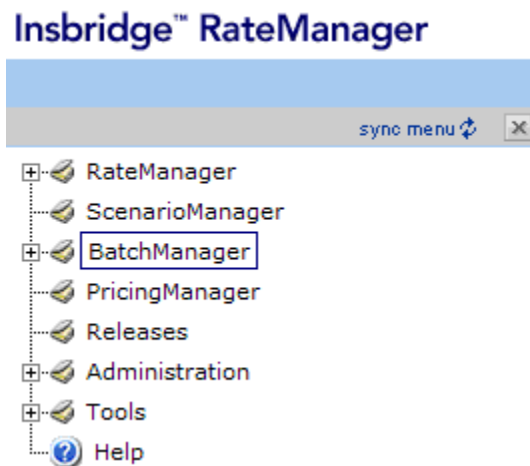
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PREFACE

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



AUDIENCE

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

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

The Oracle Insurance Insbridge Rating and Underwriting RateManager User Guide.

The Oracle Insurance Insbridge Rating and Underwriting PricingManager User Guide.

You can view these guides in-line at this address:

<http://www.oracle.com/technology/documentation/insurance.html>

CONVENTIONS

The following text conventions are used in this document:

Convention	Description
bold	Boldface type indicates graphical user interface elements associated with an action.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter.

SYSTEM REQUIREMENTS

For minimum operating system and hardware requirements, please see the Hardware Software requirements guide.

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1 st Edition	P01-719-01	V 3.5	November 2005	
2 nd Edition	P01-719-02	V 3.5	June 2006	Update
3 rd Edition	P01-725-03	V 3.6	June 2006	Update Version
4 th Edition	P01-719-04	V 3.7	December 2006	Update Version
5 th Edition	P01-719-05	V 3.8	July 2007	Update Version
6 th Edition	P01-719-06	V 3.8.3	October 2007	Update Version
7 th Edition	P01-719-07	V 3.8.5	November 2007	Update Version
8 th Edition	P01-719-08	V 3.8.7	January 2008	Update Version
9 th Edition	P01-719-09	V 3.8.8	March 2008	Update Version
10 th Edition	P01-719-10	V 3.9	May 2008	Update Version
11 th Edition	P01-719-11	V 3.10	September 2008	Update Version
12 th Edition	P01-719-12	V 3.11	December 2008	Update Version
13 th Edition	P01-719-13	V 3.12	July 2009	Update Version
14 th Edition	P01-719-14	V 3.13	December 2009	Update Version

INTRODUCTION TO BATCHMANAGER

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

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

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

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

WORKING WITH PRICINGMANAGER

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

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

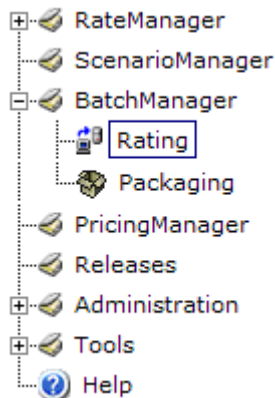
BatchManager has two options:

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

BATCHMANAGER RATING

Navigate to Rating

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



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

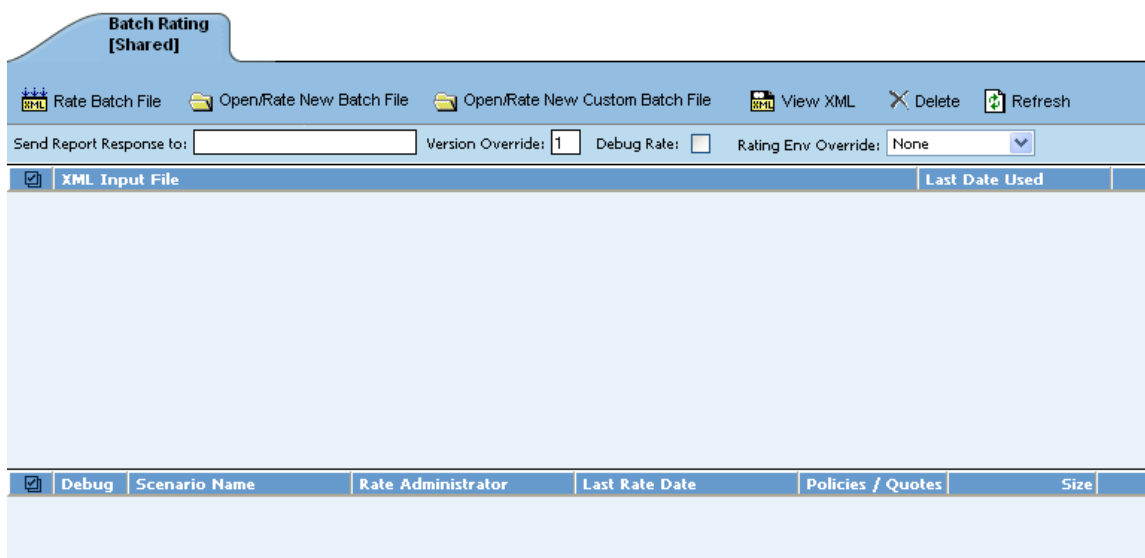


Figure 1 Batch Rating Screen

Navigation Bar

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

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

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

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

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

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

Delete: Removes the selected file(s).

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

Refresh: Refreshes the listing of input and result files.

Options

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

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

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

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

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

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

XML Input File Listing

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

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

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

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

Result File Listing

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

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

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

Scenario Name: The name of the result file.

Rate Administrator: The user that rated the file.

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

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

Size: The size of the result file.

Preparing a Batch Input File

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

There are two types of batch inputs files:

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

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

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

Individual File

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

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

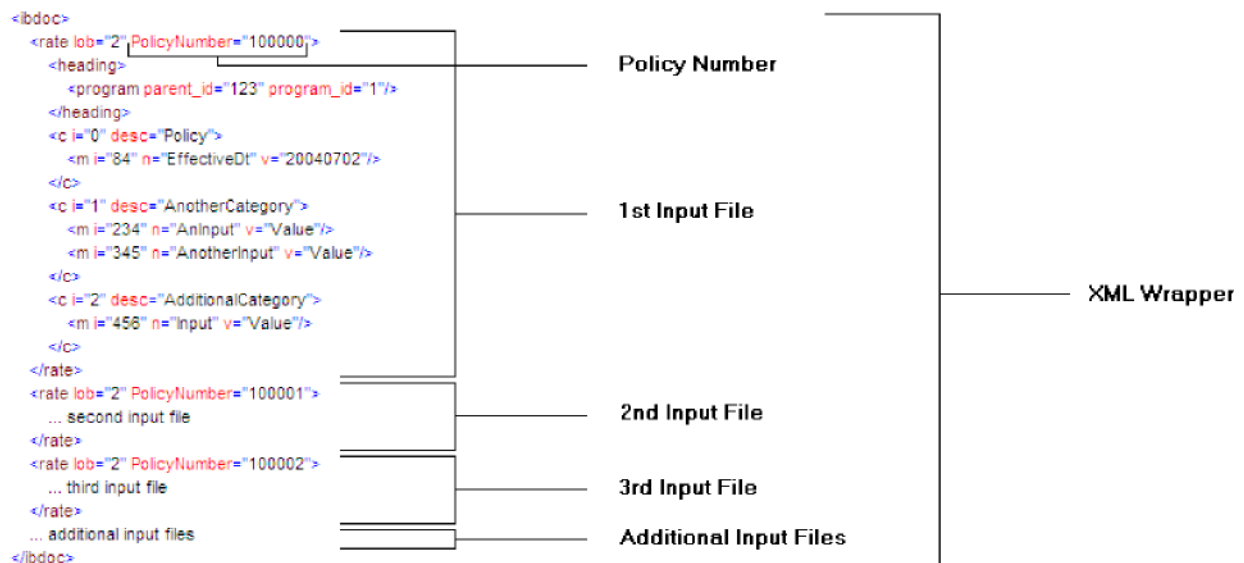


Figure 2 Example of a Batch XML File

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

Group Folders

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

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

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

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

Batch Results with New Line

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

To set Batch Results with a New Line enter RateManager and go to Tools. On the Preferences page (Tools→Preferences) will be the option to set Batch Results with a New Line. If the "Batch Results with a New Line" setting is set to true, batch results will go to a new line instead of forming one continuous string. A True setting places a carriage return between result files. A False setting will result in one continuous string without a break. Please see the RateManager guide for more information.

Rating a Batch File

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

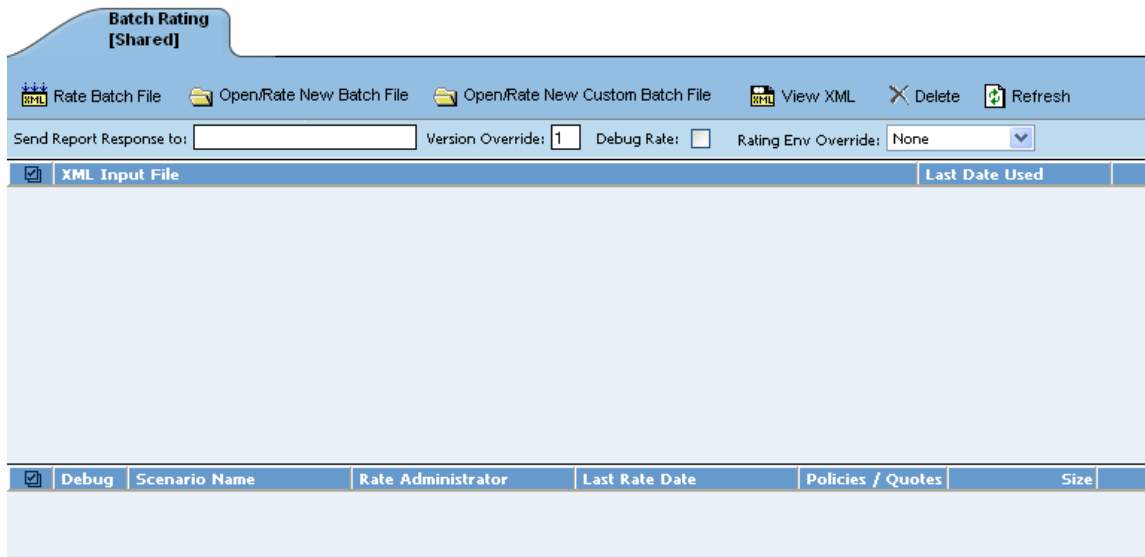


Figure 3 Batch Rating Screen

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



Figure 4 Entering a Batch File Name

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


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



Figure 5 Confirmation Message for Batch Rate Request

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

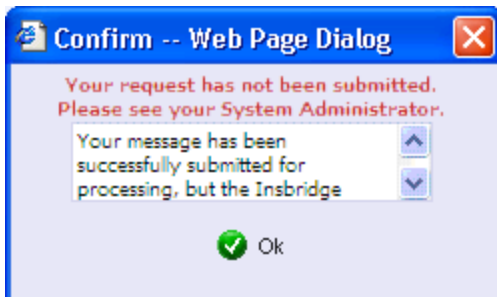

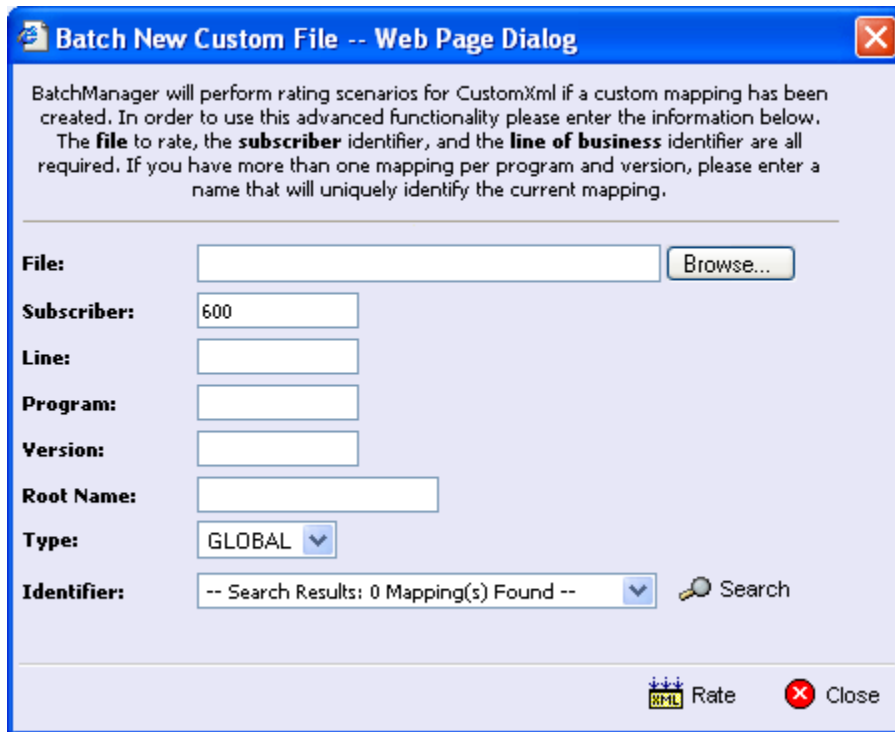


Figure 6 Error Message for Batch Rate

Open/Rate New Custom Batch File

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



Batch New Custom File -- Web Page Dialog

BatchManager will perform rating scenarios for CustomXml if a custom mapping has been created. In order to use this advanced functionality please enter the information below. The **file** to rate, the **subscriber** identifier, and the **line of business** identifier are all required. If you have more than one mapping per program and version, please enter a name that will uniquely identify the current mapping.

File:

Subscriber:

Line:

Program:

Version:

Root Name:

Type:

Identifier:




Figure 7 New Rate Custom Batch File Dialogue Box

1. If you know the path to the file you want to rate, type it in the box, otherwise, click to find a file to rate.
2. Enter in the **Line**, **Program** and **Version** numbers. The Subscriber number will default to your current number.
3. Enter in the **Root Name**. This is the element name that delineates each quote. Do not include the element brackets.

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

In the example below, **Quote** is the element that marks the beginning and end of each quote.

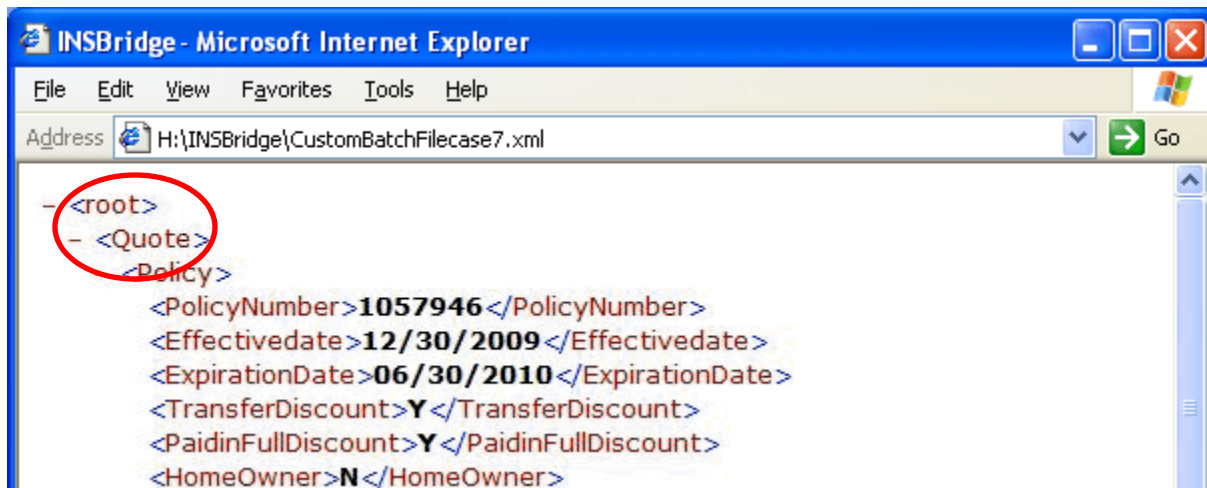


Figure 8 Example Custom Batch File


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



Figure 9 Confirmation Message for Batch Rate Request

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

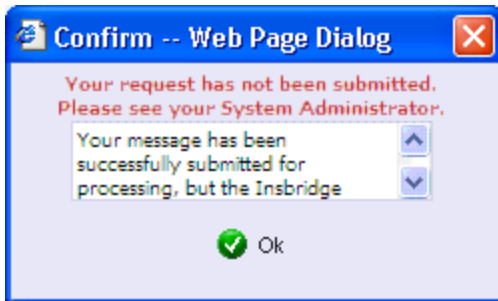



Figure 10 Error Message for Batch Rate

Deleting a Batch File

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

To Delete an Input File

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

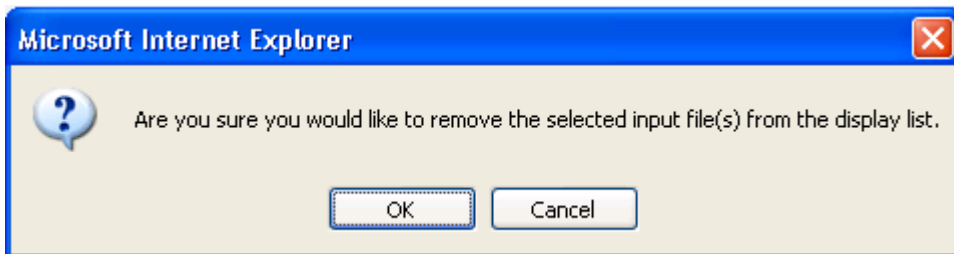


Figure 11 Delete Input File Message

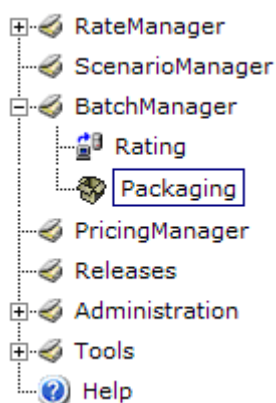
4. Click **OK** to delete the input file. Click **Cancel** to return to the batch rating screen without deleting the input file.

BATCHMANAGER PACKAGING

Navigating to Packaging

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

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



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

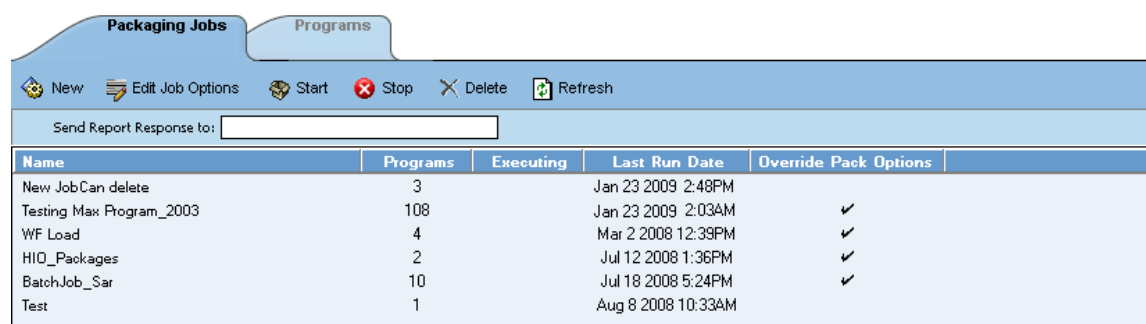


Figure 12 Packaging Jobs Screen

Navigation Bar

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

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

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

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

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

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

Delete: Removes the selected packaging job.

Refresh: Refreshes the listing of packaging jobs.

Options

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

Result File Listing

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

Name: The name of the package job.

Programs: The number of programs that packaging job contains.

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


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

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

CREATING A PACKAGING JOB

A packaging job can be created at any time.

To Create a New Packaging Job

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

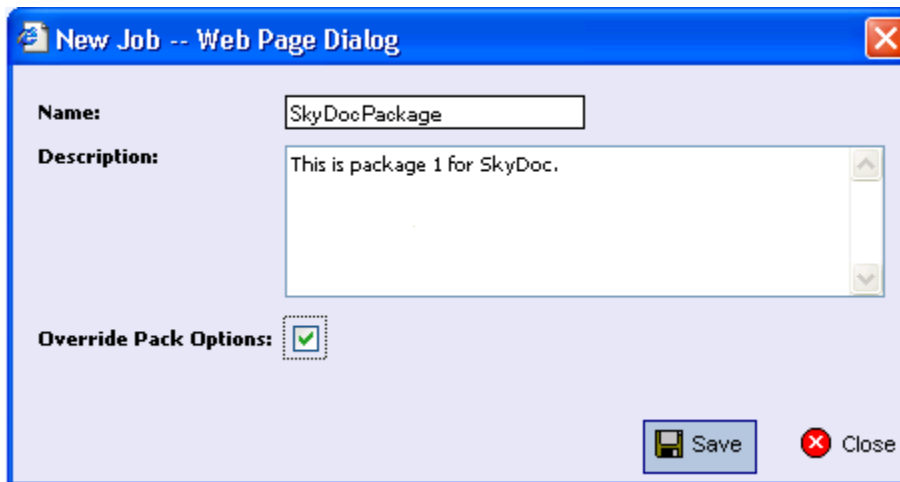




Figure 13 Creating New Job

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

EDITING A PACKAGING JOB

A packaging job can be edited at any time.

To Edit a Packaging Job

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

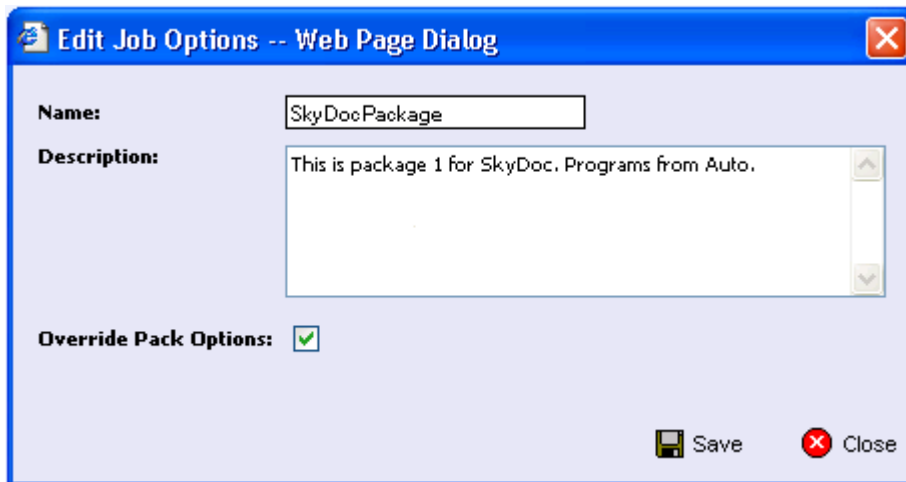




Figure 14 Edit Job Options

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

START A PACKAGING JOB

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

To Start a Packaging Job

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

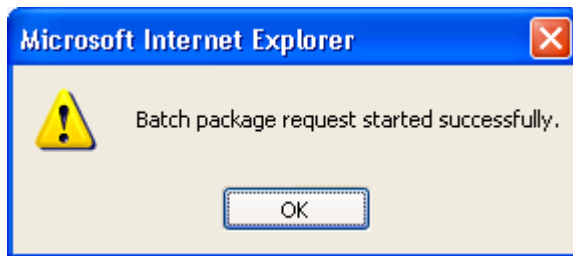


Figure 15 Starting a Batch

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


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

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

STOP A PACKAGING JOB

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

To Stop a Packaging Job

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

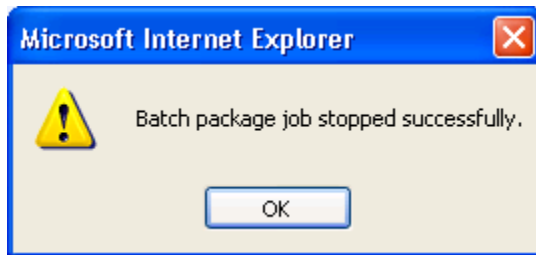


Figure 16 Stopped Packaging


3. Click **OK** to close the message.

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

DELETE A PACKAGING JOB

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

To Delete a Packaging Job

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

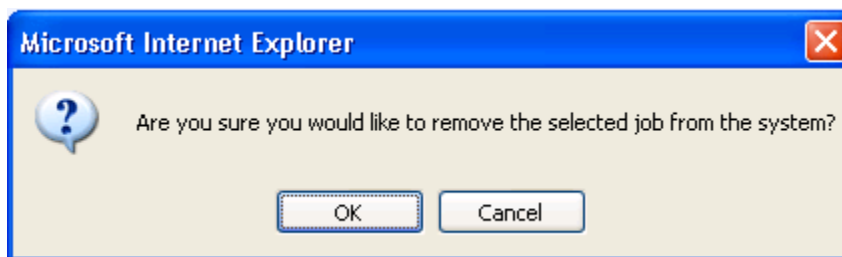


Figure 17 Stopped Packaging

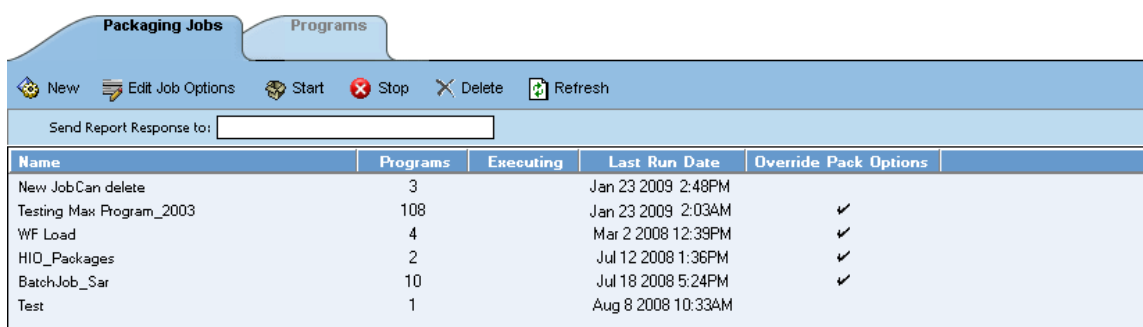
3. Click **OK** to delete the job or **Cancel** to cancel the request and return to the previous screen.

PROGRAMS TAB

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

Navigating to the Programs Tab

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



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

Figure 18 Programs Tab

Navigation Bar

Refresh: Refreshes the Content window.

Add Programs: Opens the Add Program window.

Remove Programs: Removes the selected programs from the release.

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

Release Content Listing

Program Desc: The name of the program.

Line: The line of business for a specific program.


ProgID: The unique ID for a specific program.

ProgVer: The version number for a specific program.

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

Adding Programs to a Packaging Job

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

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

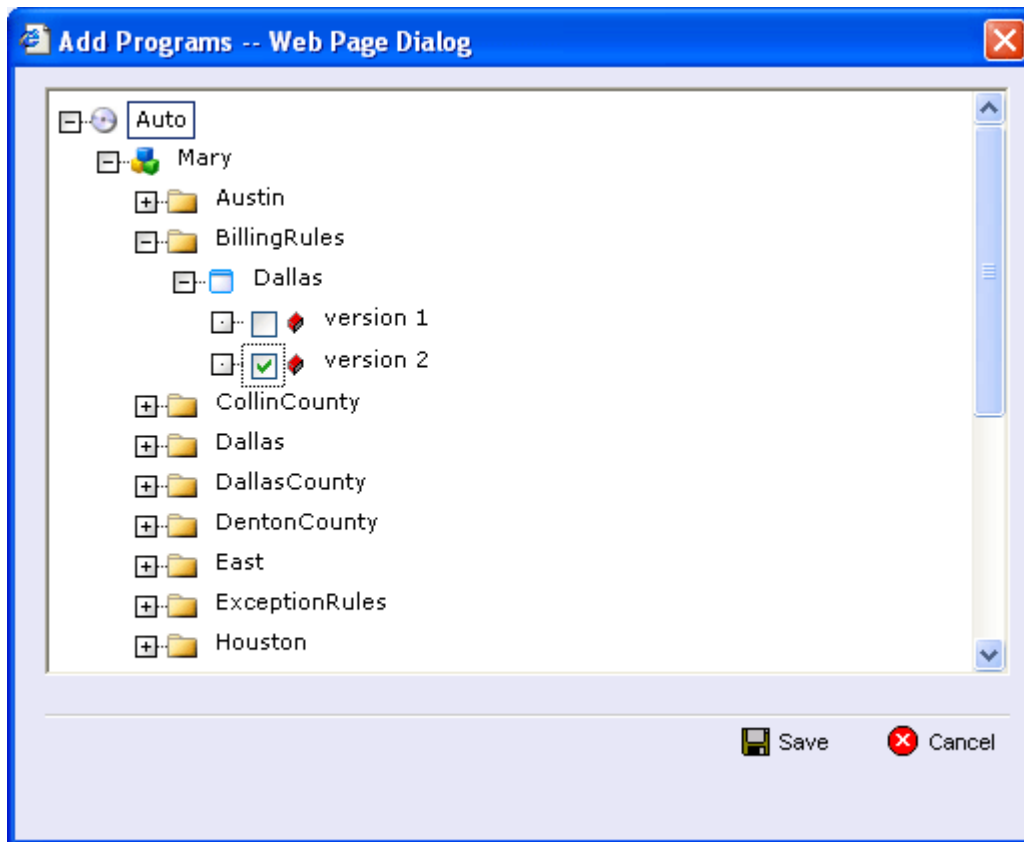




Figure 19 Adding Programs to a Packaging Job

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

Removing a Program

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

 Remove Program(s).

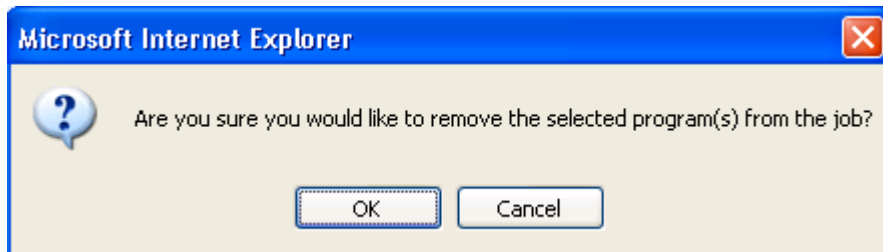



Figure 20 Deleting Programs

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

Editing Pack Options – Allowing for Override

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

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

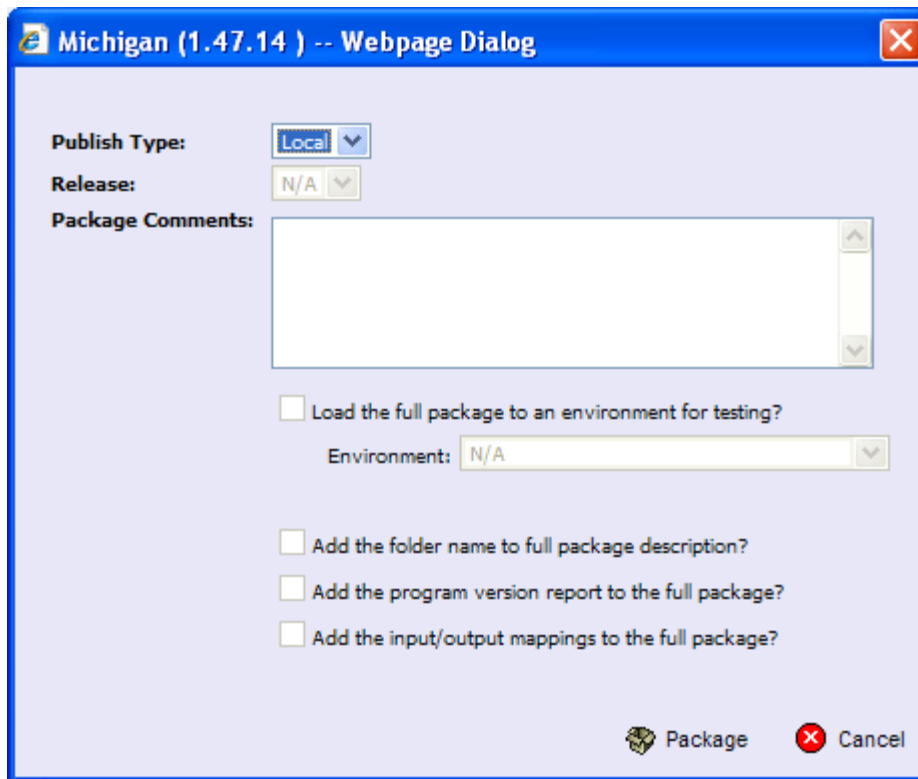


Figure 21 Editing Program Packaging Options Allowing for Override

Screen Options

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

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

- Local
- Full

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

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


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

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

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

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

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

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

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

Editing Pack Options – Not Allowing for Override

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

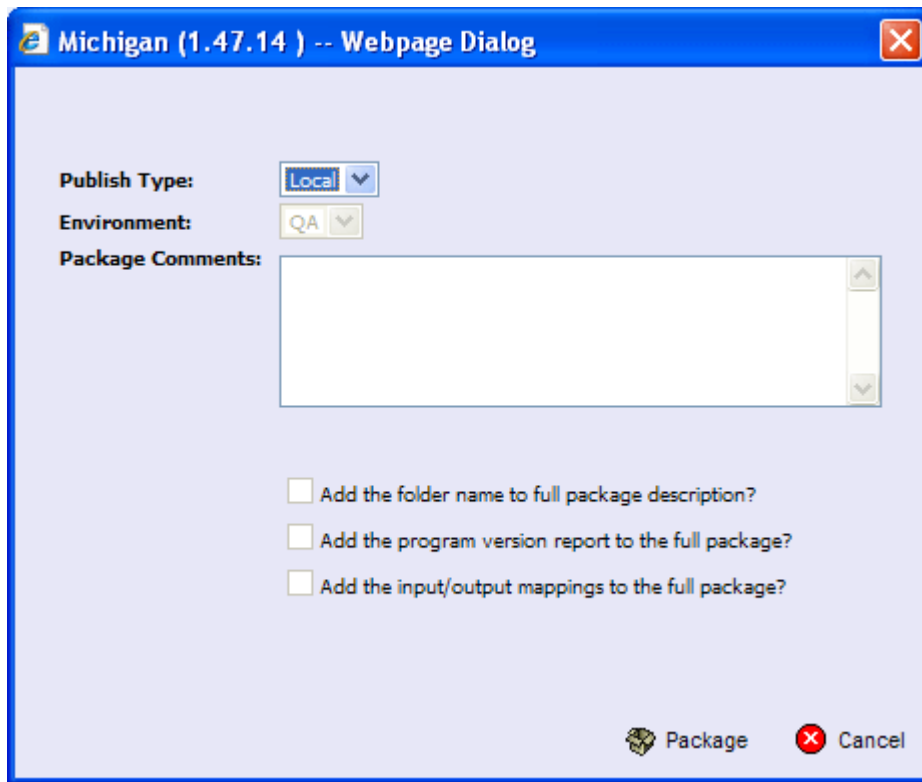


Figure 22 Editing Program Packaging Options Not Allowing for Override

CONTACTING 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 <https://support.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
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GLOSSARY TERMS

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.
Authoring Environment	The physical machine where RateManager is installed.
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	A driver assignment scenario is a list of instructions that define the

Scenario:	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	
IBFA	Insbridge Framework Administrator. IBFA is an administrative tool used to configure Insbridge applications and setup RateManager database connections. IBFA will be located on a Windows Server machine. IBFA/SR-WIN is an Insbridge Framework Administrator/SoftRater for Windows.
IBSS	Insbridge SoftRater Server. IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within IBRU that executes the rules, rating and underwriting instructions as defined by the user in RateManager. IBSS is usually located on a Java machine. IBSS/SR-JAVA is an Insbridge SoftRater Server/SoftRater for Java.
IBRU	Insbridge Rating and Underwriting System. This is the entire system.
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.
Logical Environment	An environment created for a subscriber in IBFA. It defines package location, engine location and database location in addition to several other supporting data items. This environment is used for rating and/or SRP management. Each database connection will have a logical environment.
M	
Mapped Variable:	A variable that uses other variables and inputs as criteria in determining the appropriate value. See Mapped Variables in the Contents section for more information.
Mask:	A feature that allows the customer to determine how data should be interpreted. See Masking in the Contents section for more information.
N	
Normal Rating Algorithm:	<p>The most common type of algorithm. Examples of what it can be used for are:</p> <ul style="list-style-type: none">• Determine premiums• Calculate differences in limits being passed into the system vs. limits being rated by the system• Assign tiers
O	
Operator:	A built-in mathematical function used in calculations and comparisons.
P	
Package:	A small file that holds all the RateManager logic for a specific program and version.
Package Location	A pointer to a location where SoftRater Packages (SRP's) are stored.
Physical Environment	A physical environment is generally referred to as a physical machine.
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.
Rating Environment	The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
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.
RM	RateManager. RateManager is a component within IBRU that enables users to manage the product definition and modification process, including rating and underwriting logic.
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
SoftRater Node	A SoftRater node is either an IBFA (without RateManager) or IBSS instance on a physical environment.
Source:	The source is the creator of a template and will also be the name of the new subline.
SR	SoftRater. The engine that executes the rating, rules and underwriting instructions defined within RateManager. The rating environment for runtime execution and processing of business content. SoftRater can be further defined by the operating system where it has been loaded.
SRP	SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.
SR-JAVA	SoftRater for Java. This is also another name for IBSS.
SR-WIN	– SoftRater for Windows. This is also another name for IBFA.
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.
VFS	Virtual File Servers. Virtual file server management allows you to set up servers that are in different locations where packages can be downloaded.
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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