

Oracle Insurance

**Insbridge Enterprise
Rating
RateManager User Guide
Modules Volume 2**

Release 5.1.X

December 2015

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Oracle Insurance Insbridge Enterprise Rating RateManager User Guide

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Preface

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

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.

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Enterprise Rating Framework Administrator User Guide.
- The Oracle Insurance Insbridge Enterprise Rating RateManager User Guide Vol 1
- You can view this and other Insbridge guides on-line at this address:

<http://www.oracle.com/technetwork/documentation/insurance-097481.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, URLs, code in examples, text that appears on the screen, or text that you enter.

NAVIGATING RATEMANAGER

Navigate through Oracle Insurance Insbridge Enterprise Rating RateManager (RateManager) using the RateManager top and side menus as well as right click menus, which will be pointed out as they occur. Browser tool bars may not be displayed, may not navigate correctly, or may try to close your RateManager instance.

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: *Insbridge requires Microsoft Internet Explorer 11. Other browsers are not compatible at this time.*

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.

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	P01-741-01	R 4.6.1	November 2012	Split
2 nd Edition	P01-741-02	R 4.7	September 2013	Release Update
3 rd Edition	P01-741-03	R 4.7.1	November 2013	Update
4 th Edition	P01-741-04	R 4.8	August 2014	Update
5 th Edition	P01-741-05	R 4.9	December 2014	Update
6 th Edition	P01-741-06	R 5.0	August 2015	Update
7 th Edition	P01-741-07	R 5.1	December 2015	Update

TESTING

The Testing module is the testing tool within RateManager. It allows you to test your rating program during development, without the need to load packages. Testing interfaces with the local SoftRater to rate one input XML file against the tables, rules, and logic created within RateManager and outputs a report.

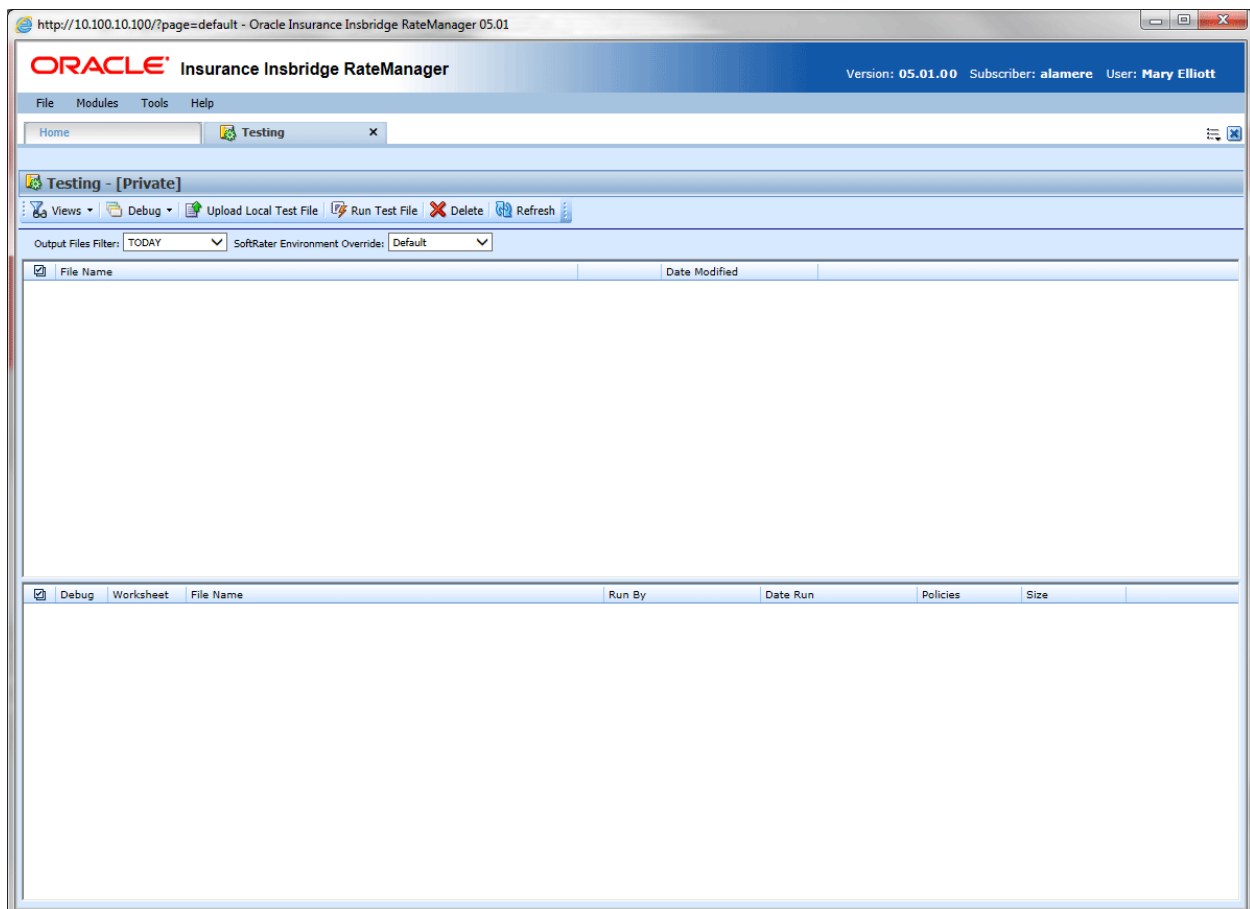


Figure 1 Testing

Navigating to Testing


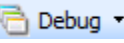
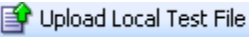
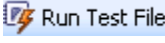
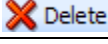
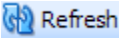
You must have permissions to view and manage the Testing module. If Testing is not an option, you do not have permission. Please contact your system administrator to have permissions added.

1. From the Home Tab, select Modules→**Testing**.
2. This opens the **Testing** module in a separate tab.

FUNCTIONALITY

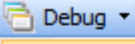
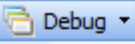
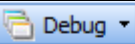
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab.

Functions

 Views	<p>Views: Allows you to select the view you want. There are two views:</p> <ul style="list-style-type: none"> • Private view contains files that are visible to the current user only. The default view is Private. • Public view contains files that are shared by all users for this subscriber. <p>NOTE: The view you are currently on is in the banner above the menu bar.</p>
 Debug	<p>Debug: The Debug dropdown contains options to include with the result.</p>
 Upload Local Test File	<p>Upload Local Test File: Uploads an XML input file located on your local computer or network to the Testing for rating.</p>
 Run Test File	<p>Run Test File: Rates an existing/displayed input file. To use, place a check in the box next to the File Name and select this option.</p> <p>NOTE: You can also rate an existing/displayed input file by double clicking it.</p>
 Delete	<p>Delete: Removes the selected file(s) from Testing.</p>
 Refresh	<p>Refresh: Refreshes the listing of rated files. This is useful when looking at shared scenarios.</p>

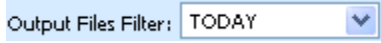

Debug Options

Debug options allow you to further define the batch rating.

 <div> <input checked="" type="checkbox"/> Include Debug Report <input checked="" type="checkbox"/> Include Empty Results <input type="checkbox"/> Add Worksheet </div>	<p>Include Debug Report: Sends the rate through debug. The debug report provides comprehensive detail of every variable and algorithm that is used within the program, allowing you to see each step of every calculation. This option is checked by default. Debug files are local to the Testing tab.</p>
 <div> <input checked="" type="checkbox"/> Include Debug Report <input checked="" type="checkbox"/> Include Empty Results <input type="checkbox"/> Add Worksheet </div>	<p>Include Empty Results: Includes empty results in the result report. Empty results are results with a null value. Zero value items are included. The default is for all results to be included.</p> <p>Unchecking this box removes any empty results from the result report. Excluding empty results produces a smaller report.</p>
 <div> <input checked="" type="checkbox"/> Include Debug Report <input checked="" type="checkbox"/> Include Empty Results <input checked="" type="checkbox"/> Add Worksheet </div>	<p>Add Worksheet: Adds the rating worksheet associated with this program in the result report. A Worksheet is a user defined document that conveys the basic information regarding how the premium was created. You must check this prior to rating.</p>

Definition Options

Definition options allow you to further define the batch rating.

	Output Files Filter: Allows you to filter the rated files by when the files were produced.
	SoftRater Environment Override: Allows you to select which environment to rate the XML Input File. <ul style="list-style-type: none"> • Default: selects the default environment. • Another Environment: if other environments have been entered, you may select one of those. <p>NOTE: If you select another environment, any defined environments in your ratings will be ignored.</p>

Selecting a View

There are two views available:

- **Public:** The files available to all users.
- **Private:** The files available only to you. This is the default view.

Select the view you want from the Views option in the top bar menu. The tab refreshes with your selection. The banner at the top of the tab displays the current selection.

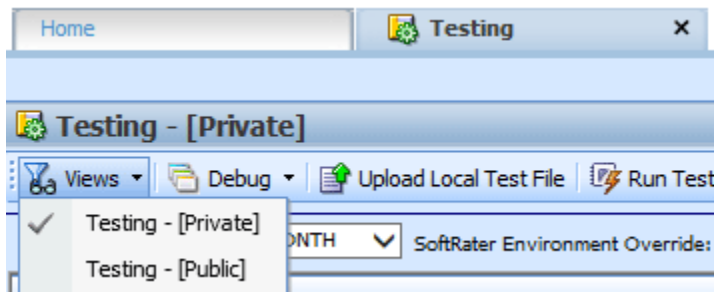


Figure 2 Selecting the View

Files can be moved from one view to another with the copy feature. Once a file is public, it can be viewed by anyone with Testing Tab privileges. Public files can be deleted if you do not want to share the file.

FIELDS

There are two areas on the Testing Tab.

- **Input File Listing:** Shows a listing of input files, sorted newest to oldest by the last date used time stamp. This is the upper portion of the window.
- **Result File Listing:** Shows a listing of result files, sorted newest to oldest by the last rate date time stamp. This is the lower portion of the window.

Input Files

The upper portion of the tab is the Input File Listing. The Input File Listing shows all the input files, sorted newest to oldest by the date modified time stamp. Files can be placed in this area either by being uploaded directly or by being saved in the Test Program tab. If the file you want to work on is not listed, you can return to the Test Program tab and save your file or return to Program Explorer and export your file to disk to upload directly.

The View you select also determines which files are listed, either Public or Private.

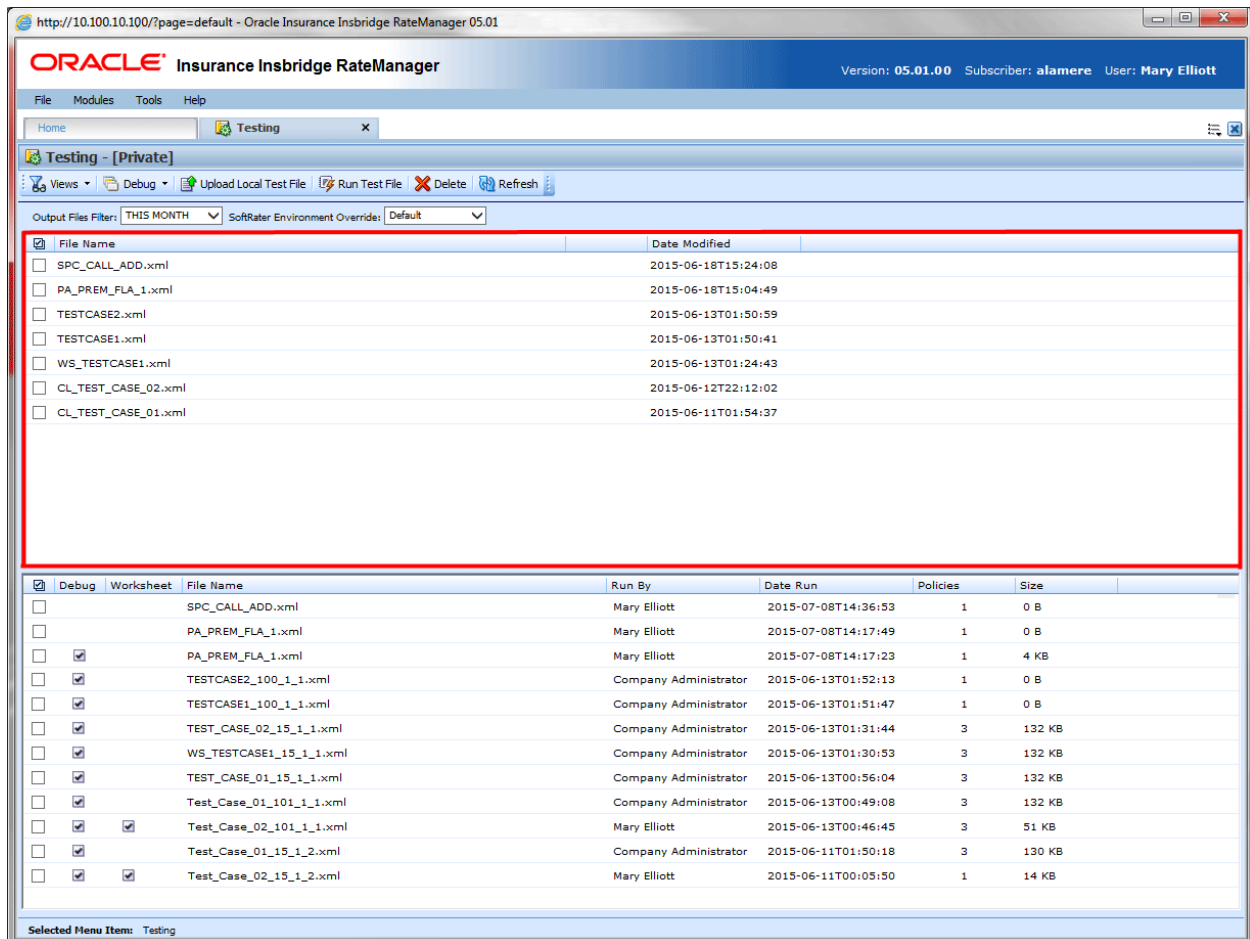


Figure 3 Input File Listing on Testing

There are three fields:

Checkbox: Used to select multiple files to delete or a single file to rate. The checkbox can also be used with View XML to view the files XML.

File Name: The name of the input file.

Date Modified: Time stamp of when the input file was last modified.

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. The Output File filter determines what files are listed.

The screenshot shows the Oracle Insurance Insnbridge RateManager 05.01.00 interface. The top bar displays the version (05.01.00), subscriber (alamere), and user (Mary Elliott). The main area shows a list of result files for testing. The table below is a detailed view of the files listed.

File Name	Date Modified
SPC_CALL_ADD.xml	2015-06-18T15:24:08
PA_PREM_FL1_1.xml	2015-06-18T15:04:49
TESTCASE2.xml	2015-06-13T01:50:59
TESTCASE1.xml	2015-06-13T01:50:41
WS_TESTCASE1.xml	2015-06-13T01:24:43
CL_TEST_CASE_02.xml	2015-06-12T22:12:02
CL_TEST_CASE_01.xml	2015-06-11T01:54:37

File Name	Run By	Date Run	Policies	Size
SPC_CALL_ADD.xml	Mary Elliott	2015-07-08T14:36:53	1	0 B
PA_PREM_FL1_1.xml	Mary Elliott	2015-07-08T14:17:49	1	0 B
PA_PREM_FL1_1.xml	Mary Elliott	2015-07-08T14:17:23	1	4 KB
TESTCASE2_100_1_1.xml	Company Administrator	2015-06-13T01:52:13	1	0 B
TESTCASE1_100_1_1.xml	Company Administrator	2015-06-13T01:51:47	1	0 B
TEST_CASE_02_15_1_1.xml	Company Administrator	2015-06-13T01:31:44	3	132 KB
WS_TESTCASE1_15_1_1.xml	Company Administrator	2015-06-13T01:30:53	3	132 KB
TEST_CASE_01_15_1_1.xml	Company Administrator	2015-06-13T00:56:04	3	132 KB
Test_Case_01_101_1_1.xml	Company Administrator	2015-06-13T00:49:08	3	132 KB
Test_Case_02_101_1_1.xml	Mary Elliott	2015-06-13T00:46:45	3	51 KB
Test_Case_01_15_1_2.xml	Company Administrator	2015-06-11T01:50:18	3	130 KB
Test_Case_02_15_1_2.xml	Mary Elliott	2015-06-11T00:05:50	1	14 KB

Figure 4 Result File Listing for Testing

There are eight fields:

Checkbox: Used to select multiple files to delete.

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

Worksheet: A checkmark indicates that the worksheet associated with this program is included.

File Name: The name of the result file.

Run By: The user that rated the file. This is useful when looking at shared scenarios.

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

Policies: The total number of policies in the result file.

Size: The size of the result file. Files that do not include a debug report will be smaller.

Right Click Menu Options

Both the Private and the Public views have the same right click menu options. There are six options for regular input files. There are seven options for input files that contain custom mappings. Result files have four options.

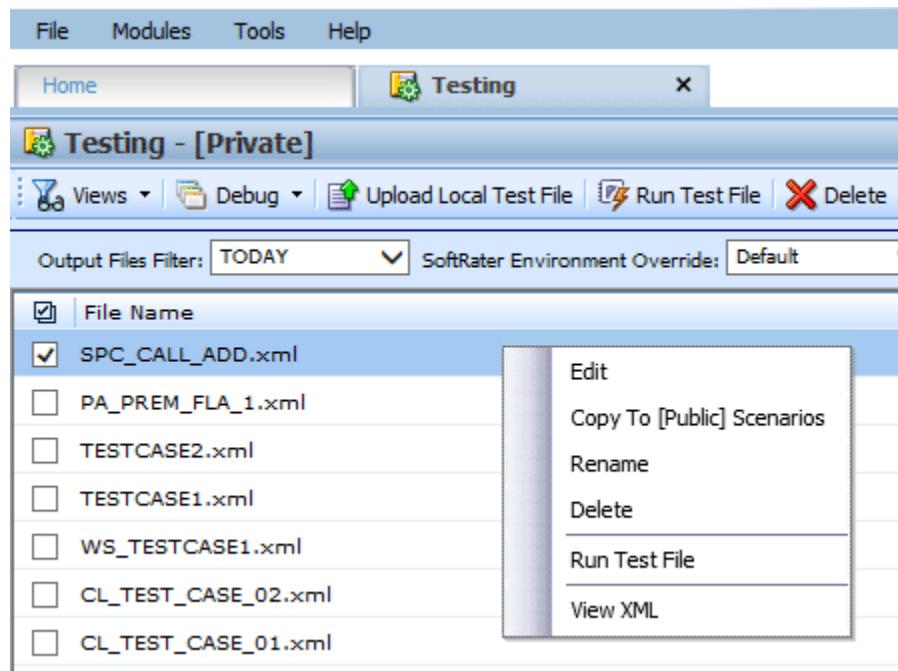


Figure 5 Right Click Menu for Testing Input File Listing

To view the Input File menu, highlight an input file and right click.

- **Edit:** Brings up the file in Test Program. The default view is XML however you can change to grid view if needed. The file can be edited and saved again. Custom files cannot be edited from Testing.
- **Copy to [Public] Scenarios:** Places a copy of the file in the Public view. If you are using a Public view, you can make a copy for your Private view.
- **Rename:** Allows you to rename the input file. A separate screen is shown. Enter in the New Name and click **Save**.
- **Delete:** Deletes the file. A warning message is displayed prior to the file being deleted.
- **Run Custom Input Mapping:** If the selected file contains a custom input mapping, selecting this option brings up the Custom Input Mapping dialog box. *This option is displayed on files that contain custom input mappings only.*
- **Runs Test File:** Runs the selected file.
- **View XML:** Allows you to view the XML in a separate screen. This functions like **View XML** on the top bar menu.

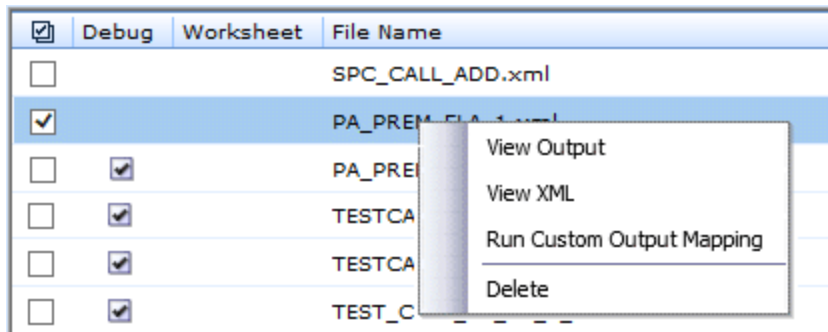


Figure 6 Right Click Menu for Testing Result File Listing

To view the Result File menu, highlight a result file and right click.

- **View Output:** Opens the result file in a separate window.
- **View XML:** Allows you to view the XML in a separate screen.
- **Run Custom Output Mapping:** This brings up the Custom Output Mapping dialog box used for this result file.
- **Delete:** Deletes the file. A warning message is displayed prior to the file being deleted.

NOTE: IE may not reveal the real local path to a file. If the file path is displayed as c:\fakepath, you may need to add Insbridge to your trusted sites.

RATING AN INPUT FILE

NOTE: If you want to rate a file using a mapping, see *Rating a File with Custom Mapping*.

To Rate an Input File

1. Select the input file you want to rate.
2. If you want to see a full debug report, check **Include Debug Report**. For a standard report with no debug report, uncheck this box.
3. Check to Add Worksheet, if available.
4. Select the SoftRater Environment Override if you want to use a specific SoftRater environment.

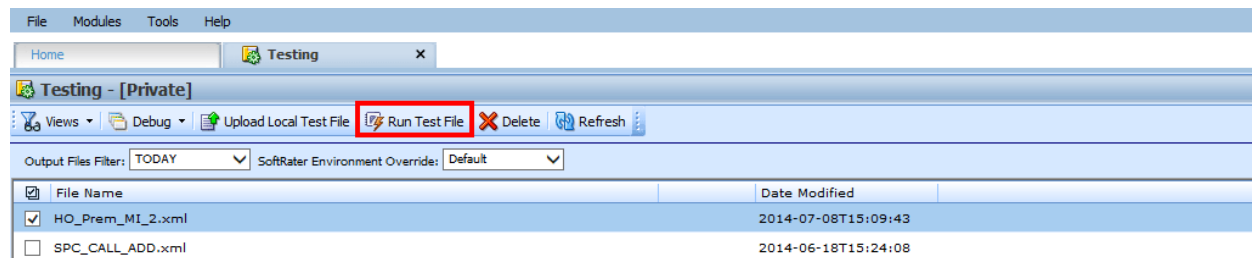


Figure 7 Rating a Test File

5. Click **Run Test File** or double-click the file. The Result file is listed below. Double-click the result file to view the report. For more information, see Viewing the Rating Report.

UPLOAD LOCAL TEST FILES

If the file you want to rate is not in the Input File Listing, you can upload it. You can upload both Insbridge XML and custom XML files that are stored locally. Only XML file types can be uploaded.

1. Click Upload a Local Test File. A separate screen is shown.

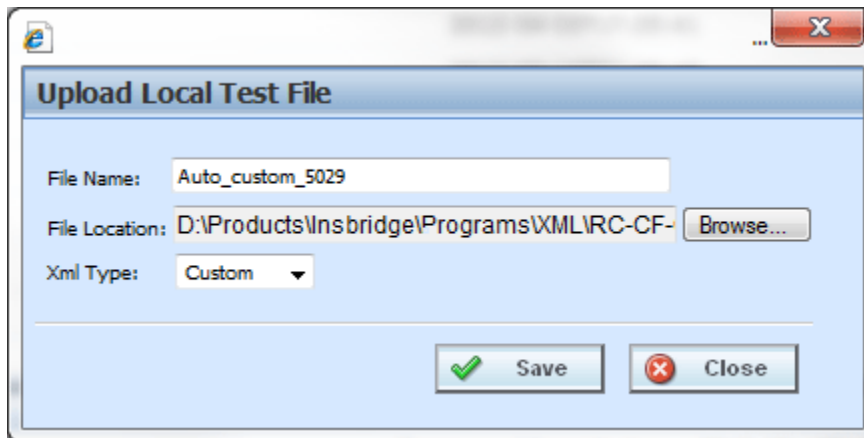


Figure 8 Uploading a Local Test File

2. Enter the name of the file.
3. Click Browse... to find a file to rate. When you select the file you want to rate, the file name will be automatically filled.
4. Select the type of XML from the drop down menu, either Insbridge or Custom.
5. When finished, click Save.
6. Your file is saved to the Testing tab. To rate the file, either double-click the file or highlight and click **Run Test File**. 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.

Editing a Test File

You can edit an Insbridge XML file from the Testing tab. Custom XML cannot be edited from the testing tab.

1. Select the file you want to edit.
2. Right click and select **EDIT**.
3. The Test Case Editor tab is shown. You can edit your file and save it again. Please see Test Program for more information on working with Test Case Editor.
4. You may need to Refresh the tab to see your saved file.

Copying to another View

Any input file in the Private view can be copied to the Public view and any input file in the Public view can be copied to a Private view. You may want to copy a Public view file to a Private view to test certain changes or copy a Private view file to a Public view to share information with other users.

1. Select the file you want to copy.
2. Right click and select **Copy to [Public or Private] View**.
3. The copy happens immediately.

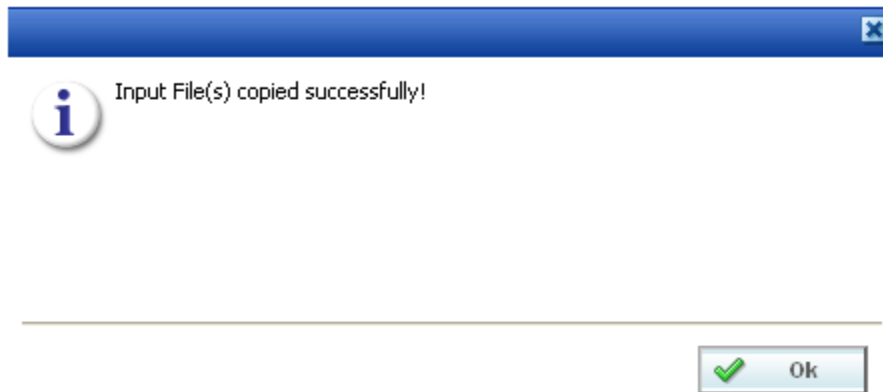


Figure 9 Copying a File to another View

Renaming a File

You can rename your input file at any time.

1. Select the file you want to rename.
2. Right click and select **Rename**. A separate screen is shown.

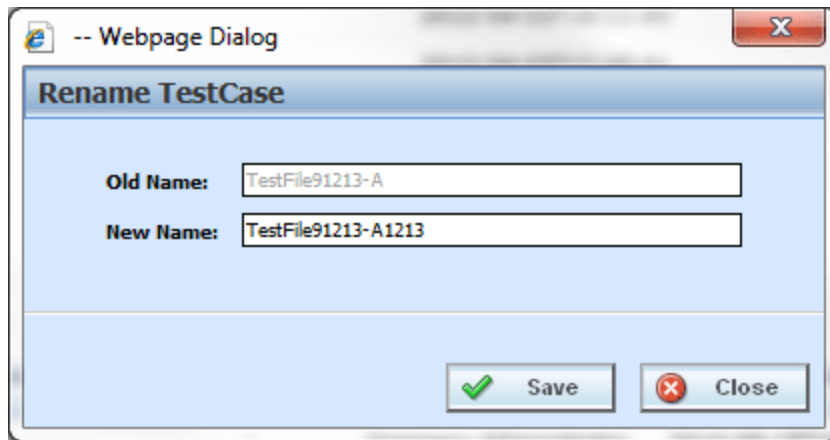


Figure 10 Renaming a Test File

3. Enter in the **New Name**.
4. Click **Save**. Your file will be listed with the new name.

Deleting an Input File

If an input or result file is no longer needed, it can be deleted. Make sure this is the action you want to take. Deletes cannot be undone.

1. Select the file you want to delete.
2. You can either click **Delete** from the top bar menu or right click and select **Delete**.

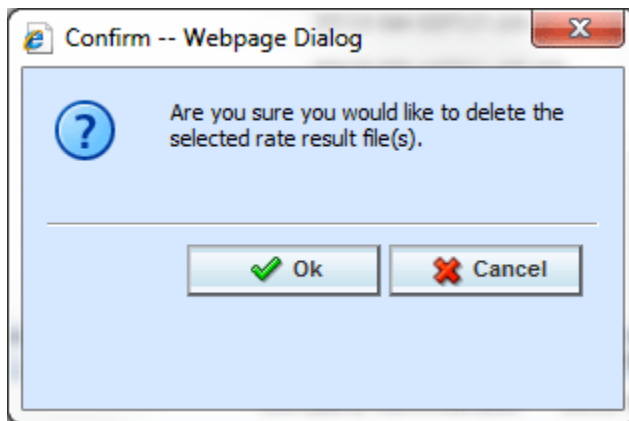


Figure 11 Deleting an Input File

3. A warning message is shown. Click **OK** to remove the file. If this is not the screen you want click **Cancel**.
4. The file will be removed.

Run Custom Input Mapping

Prior to rating an input file with custom mapping, you can select the custom mapping to use. Only files with custom mapping will have this option. If the option is not present on the right click menu, no custom files are present. Insbridge XML files do not have this option.

1. Select the file that contains custom input mapping.
2. Right click and select **Run Custom Input Mapping**. A separate screen is shown.

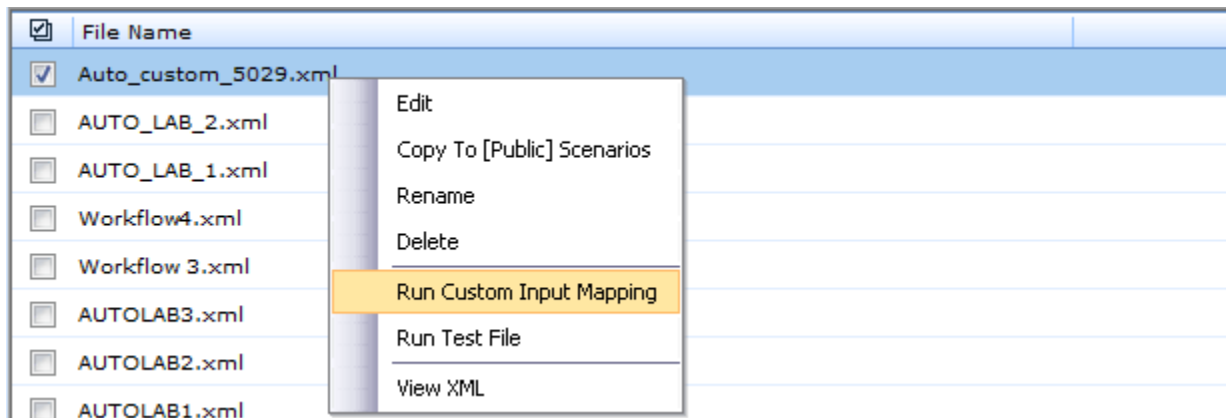


Figure 12 Running a Custom File

3. The subscriber information is filled in.

Custom XML File

RateManager 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 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.

Subscriber: 8659

Line: 1

Program: 45

Version: 3

Type: Custom Mapping

Identifier: Input1

Search

Transform Close

Figure 13 Running a Custom XML File

4. Enter in the **Product**, **Program**, and **Version** numbers.

5. Select the **Type** from the drop down menu. There are three options; Product Mapping, Version Mapping, and Custom Mapping.
6. Select the **Identifier** from the drop down menu. The options may be filled in when you select the File. Otherwise, click Search to obtain a list of custom XML files associated with this file.
7. When finished, click **Transform**. The file is displayed in the Insbridge XML viewer. Review the file and close. You also can copy the entire file onto a clipboard to view in an XML viewer.

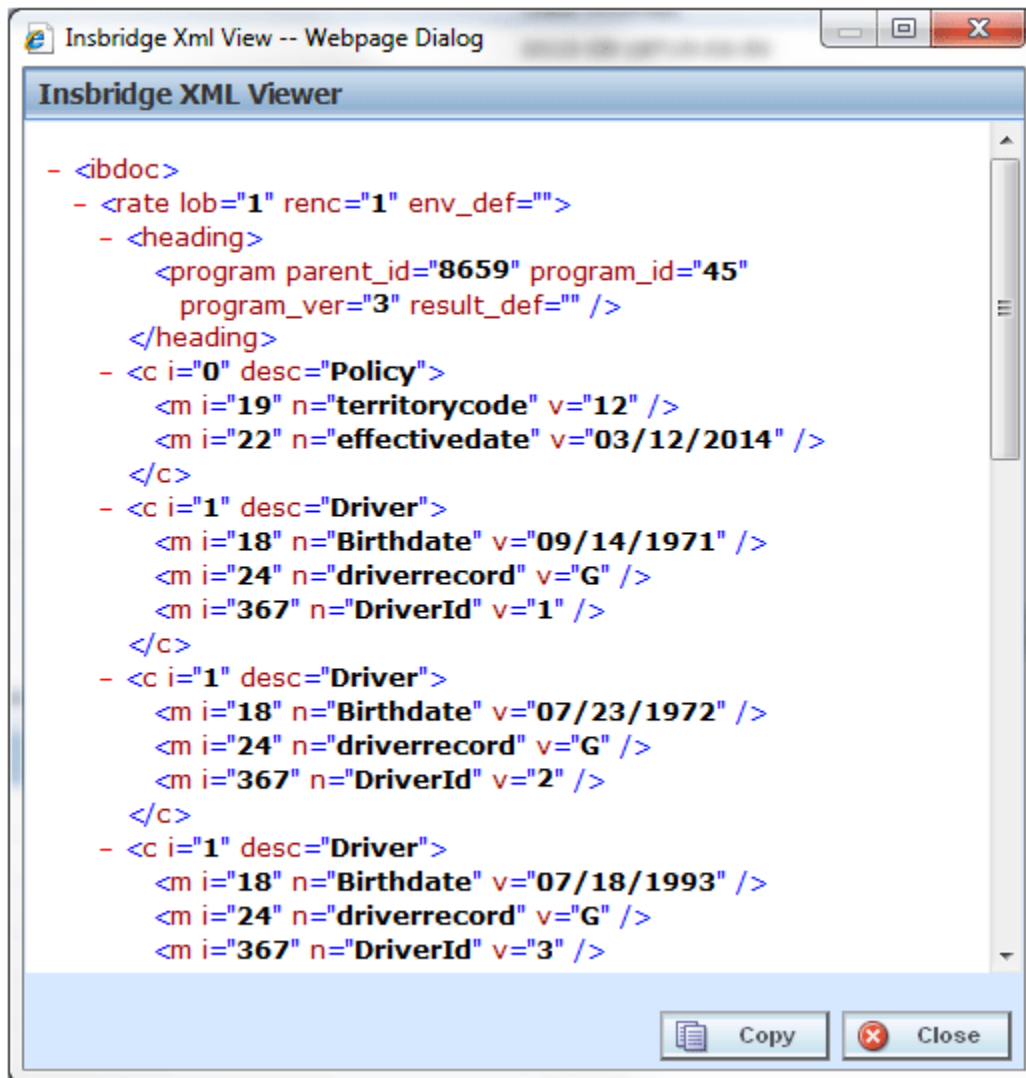


Figure 14 Transform Custom XML

8. Your file is associated with the custom XML input mapping you selected. The file is ready to be rated.

NOTE: The first time you rate a custom XML file, a Custom XML File window is displayed. Enter in the Product, Program, and Version Number. Select the type of custom input file you want to use for mapping and then select the identifier.

Viewing XML

XML can be viewed for input files. To view the XML prior to rating:

1. Select the file where you want to view the XML.
2. Right click and select **View XML**. The XML is displayed in a separate screen.

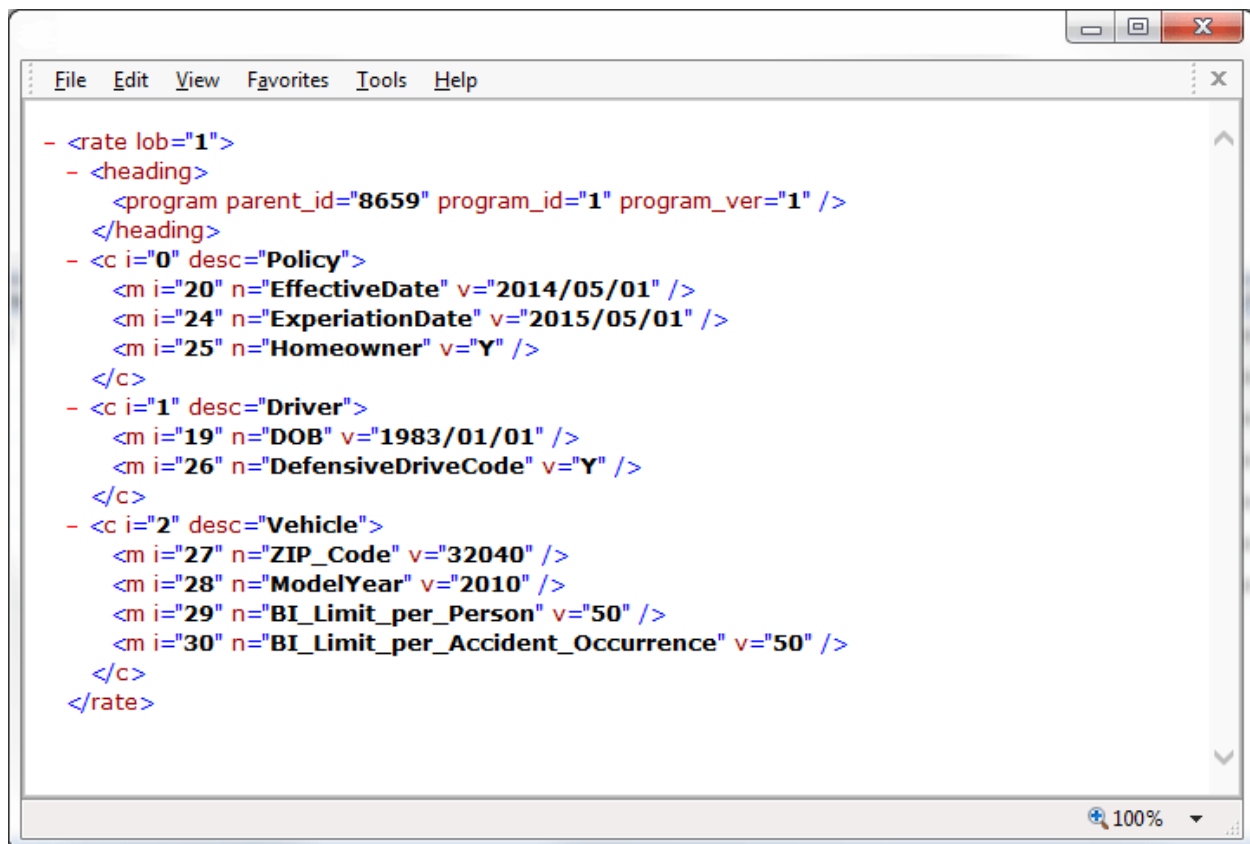


Figure 15 Viewing XML in Testing

RESULT FILES: VIEW OUTPUT

Result files are listed in the lower portion of the tab. Once an input file has been rated, the result file is placed in the Result File Listing. If the result file you need is not displayed, click Refresh to refresh the screen. The options for viewing the results are:

- **XML:** shows the actual result XML.
- **Report:** shows the result file with the results in an easy-to-read and understand format. This is the default view.
- **Worksheet XML:** shows any associated worksheet for the program. This option is only available if the Add Worksheet option was checked prior to rating and if the program has worksheets associated with it.

View XML

Reports can be viewed in XML format by changing the View on a Standard Rating Report.

1. To view the XML, select the result file you want and right click.
2. Click **View XML**. The XML file opens in a separate window.

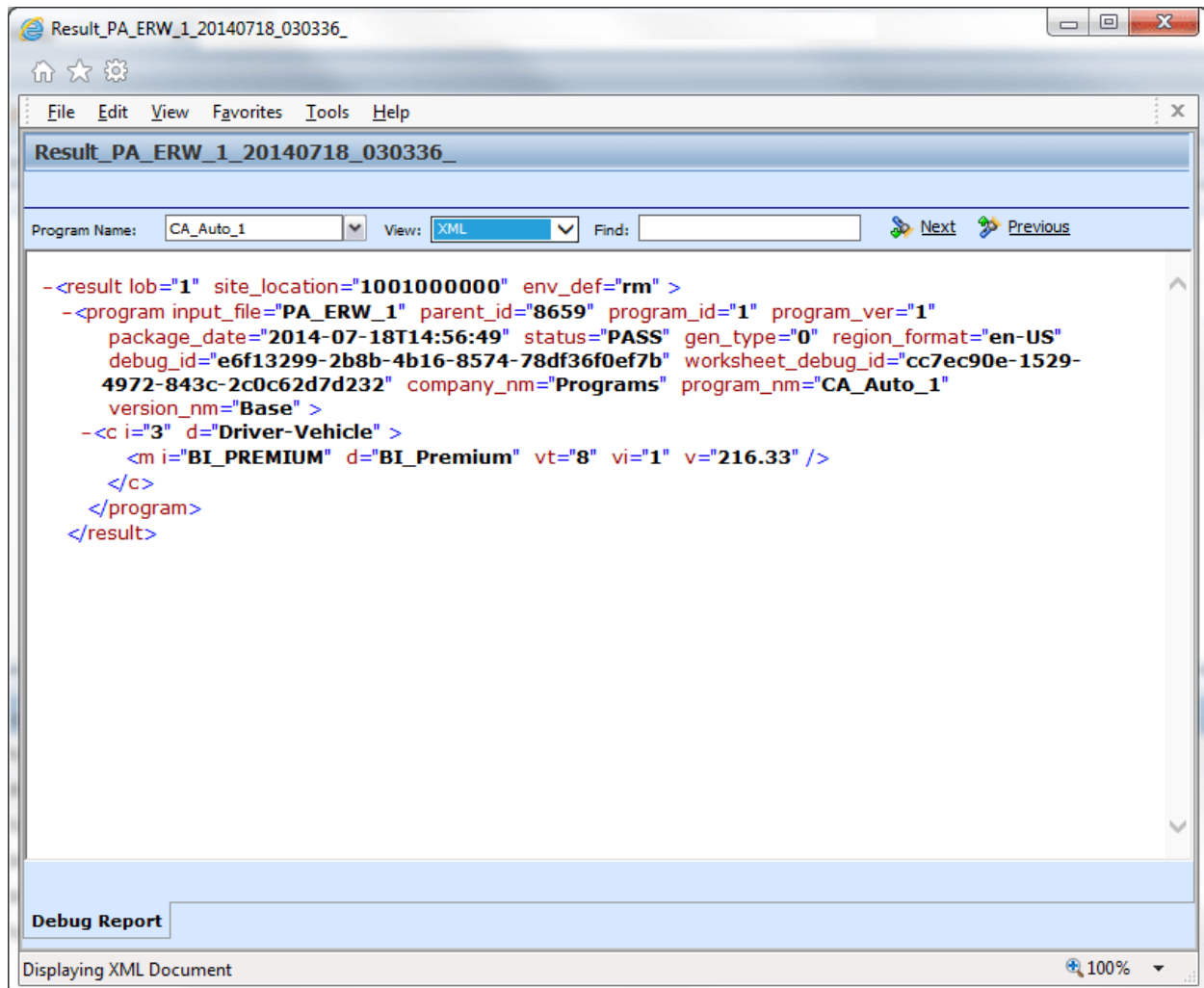


Figure 16 Rating Report, XML View

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. The report allows you select the program, if there are multiple programs, select the view format and search for specific items.

There are two ways the debug report can be presented:

- **Single Format:** A single report format is where the entire report is listed out. This is the default style in RateManager. All algorithms with execution details are listed in execution order. A single format may be useful when smaller programs are run or when all execution details need to be listed on a single page.
- **Summary Format:** A summary report format is where information is contained in sections that can be displayed or hidden. The summary format also uses pop out windows. The pop out window contains all the debug information for the selected algorithm. Multiple pop out windows can be open simultaneously. Summary report format may be useful if large programs are to be run.

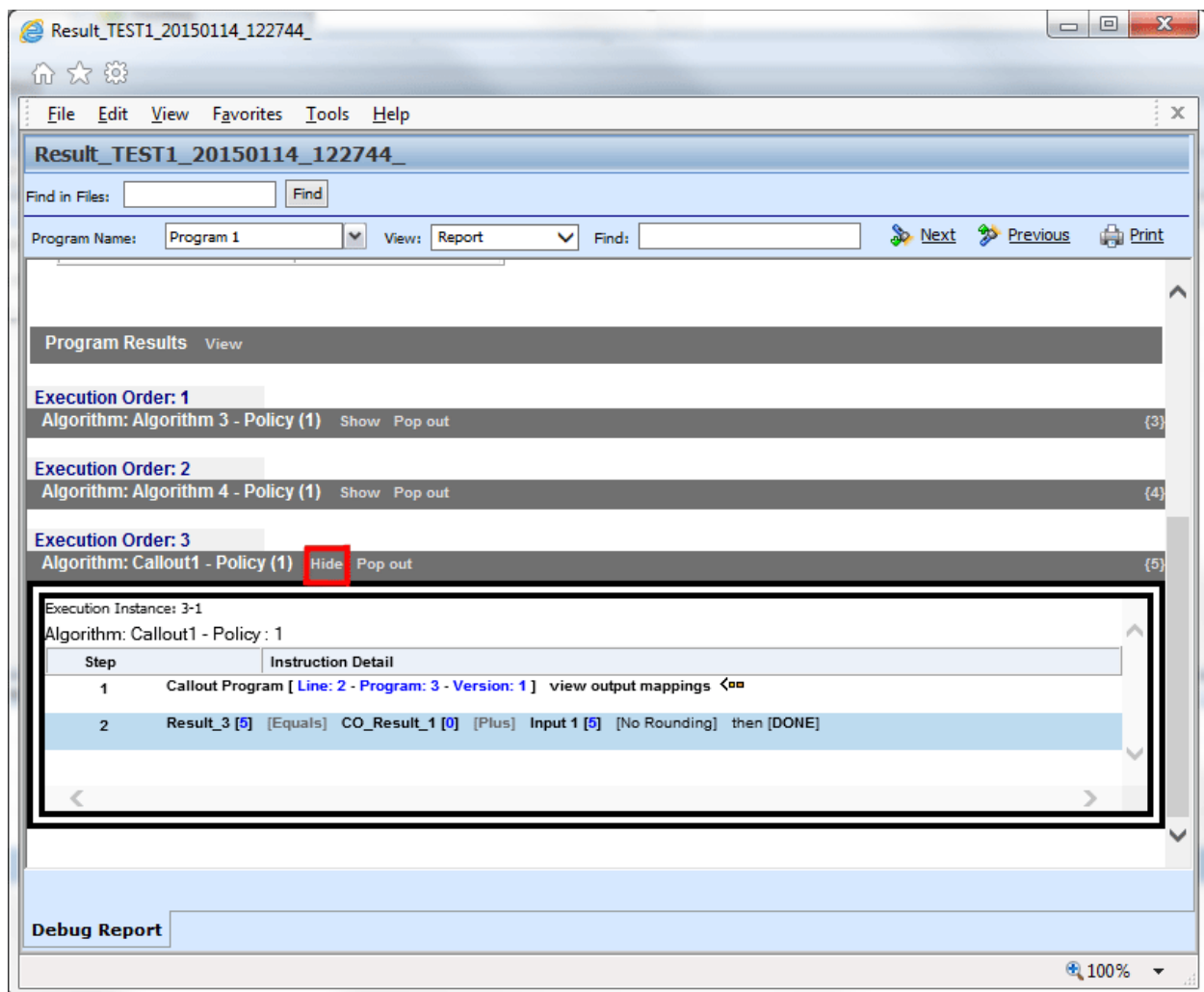


Figure 17 Debug Report in Summary Format

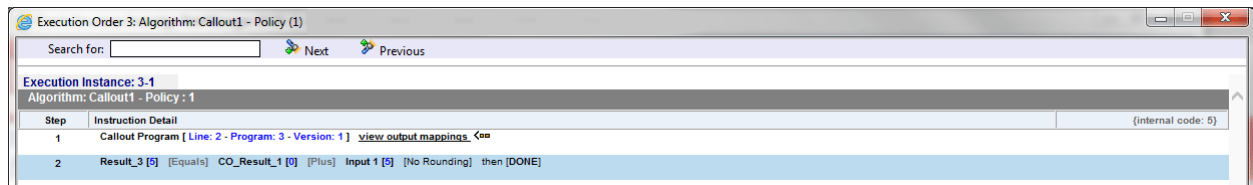


Figure 18 Debug Report Pop Out Window

The debug report format is set in Preferences by the system administrator. The setting applies to the entire system and all users. The setting can be updated at any time. If you want a different debug report format, please contact your system administrator.

Viewing the Standard Rating Summary Report

1. To view a Result file, select the file you want and either double-click or right click and select **View Output**.
2. The Rating Report opens in a separate window.

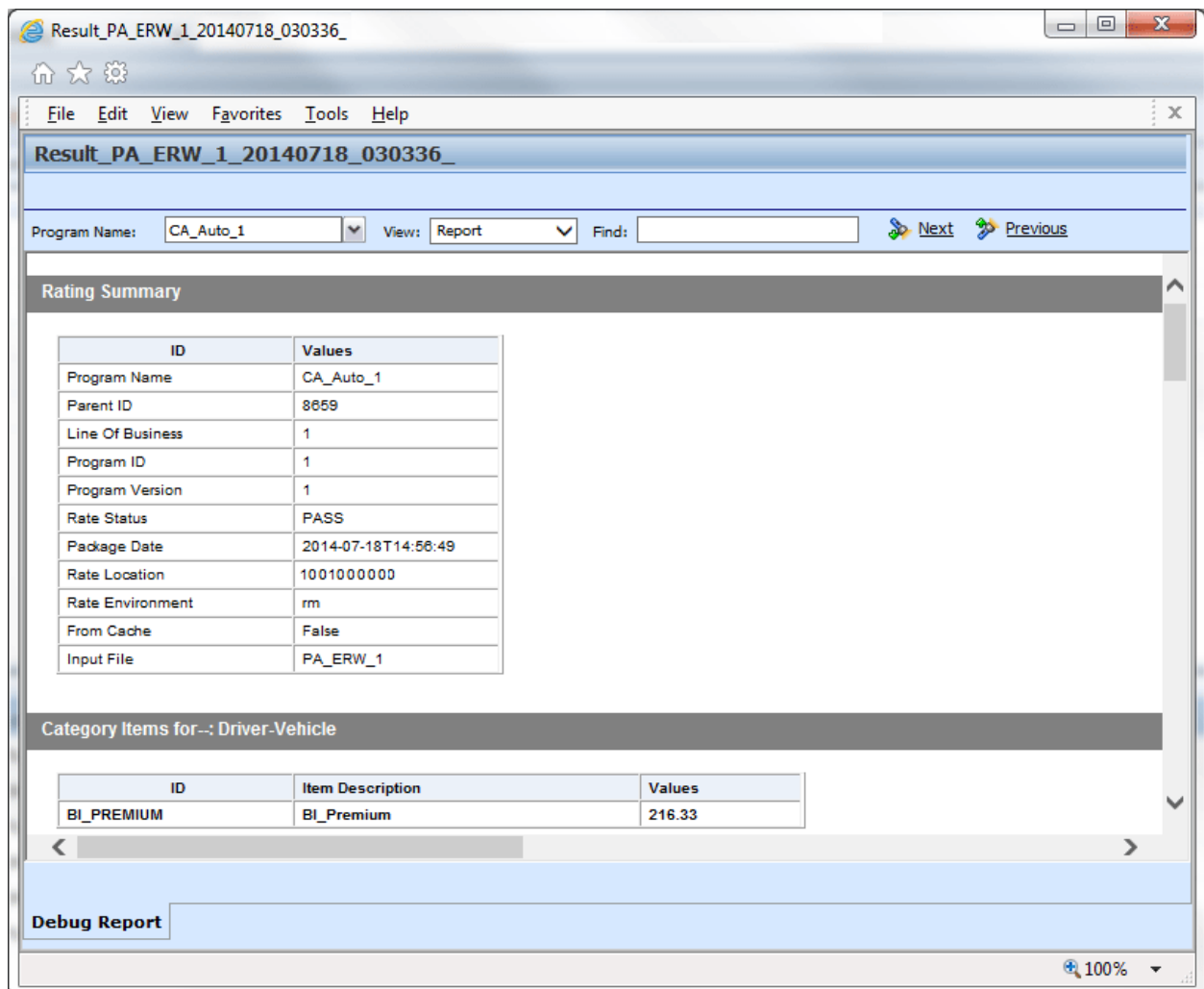

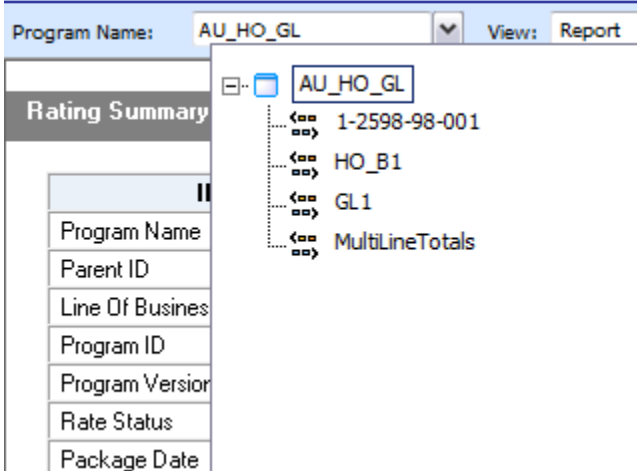



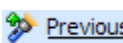



Figure 19 Debug Report in Single Report Format

FUNCTIONALITY

The **Menu Bar** is located at the top of the screen. The menu bar contains the functions you can perform. The menu is the same for reports with debug and for reports without debug.

	Find in Files: Searches the all files used in the debug report for a specific alpha/numeric character string. <i>This option is displayed in summary format only.</i>
	Program Name: Displays the name of the program being rated. The drop down menu is populated when you are rating multiple programs using Program to Program (P2P).
	View: Select the view you want: Report, XML, or Worksheet XML. Report view is the default.
	Find: Searches the debug report for a specific alpha/numeric character string.
	Next: If a search is performed, Next will navigate to the next place in the debug report that a match was found.
	Previous: If a search is performed, Previous will navigate to the previous place in the debug report that a match was found.
	Print: Prints the debug report to your local or network printer.

Using Find and Find in Files

The Find option searches the content displayed on the screen. When using summary report format, execution details are hidden. Find does not search hidden content. To search a summary debug report, you may need to show the content you want to search.

To use Find, enter a value into the field and click Next. The next instance of the value will be highlighted. If no match is found, a message is displayed.

The Find in Files option is displayed in summary format debug reports only. This feature searches all files used in the debug report, including files where the execution information is hidden.

FIELDS

The fields vary depending upon the Debug option selected.

If Debug has been selected:

- The Rating Summary is displayed at the top of the screen.
- The Category Items are listed next.
- The Debug Rating Report is last. This area contains the algorithms, drivers assignments, calculated and table variables used listed in execution order with the details of the actions performed and the results.

If Debug has not been selected:

- The Rating Summary is displayed at the top of the screen.
- The Category Items are listed next.

No algorithms will be listed.

In summary report, the fields are the same but displayed in summary style.

NOTE: *For efficiency purposes, no program to program callout will include empty results.*

Rating Summary

At the top is the Rating Summary. The ID column contains the information about the program. The Values column contains the values returned.

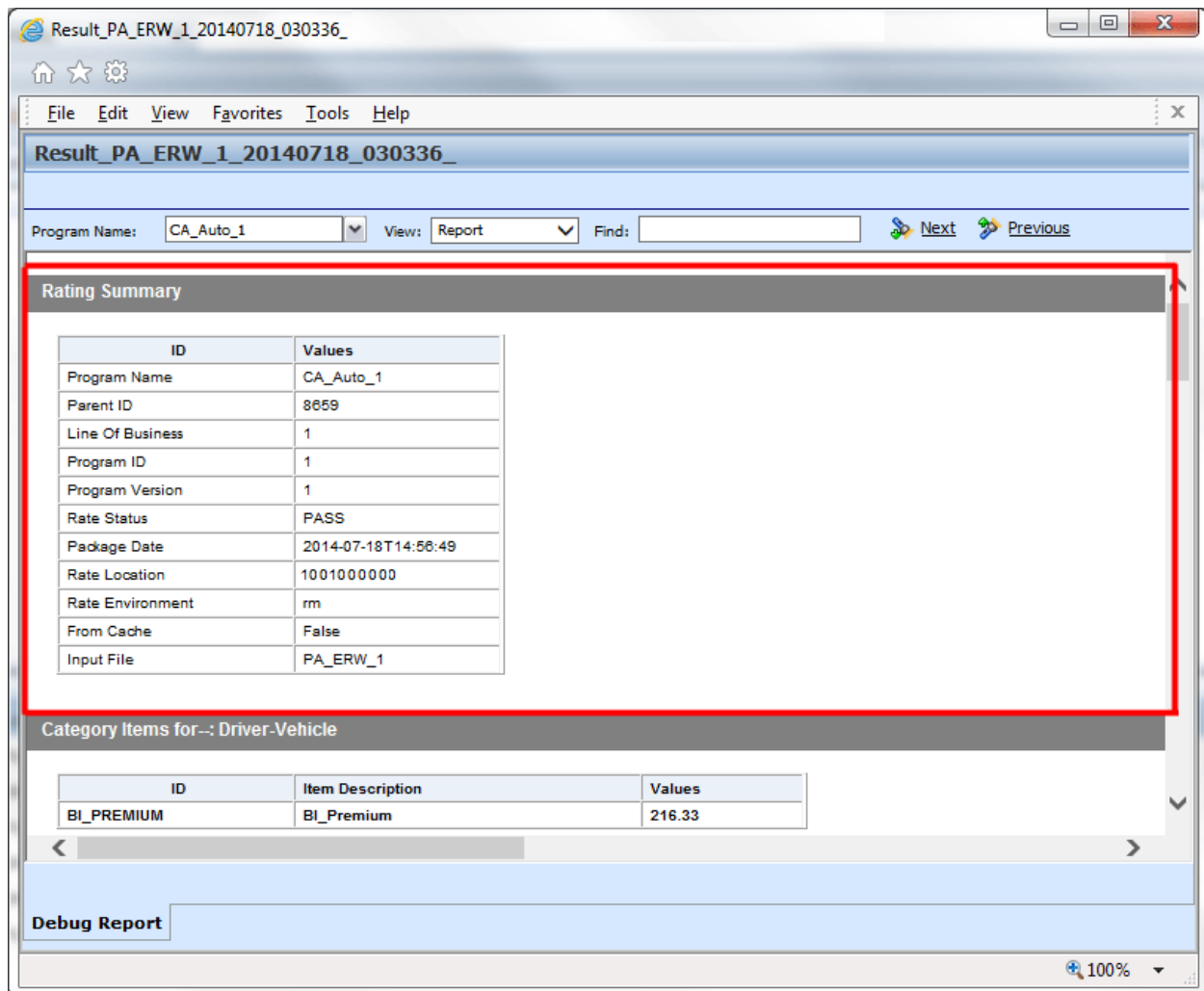


Figure 20 Rating Summary on a Debug Report

Fields

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.

Project: The Insbridge assigned ID for the product 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.

NOTE: *P2P program display the execution order after the Rating Summary. To view program details, you must select a program from the Program drop down.*

Category Items

Shows the selected results sorted by category in an easy to read table format. Elements that have the word Premium in the Item Description are bolded for easier reading.

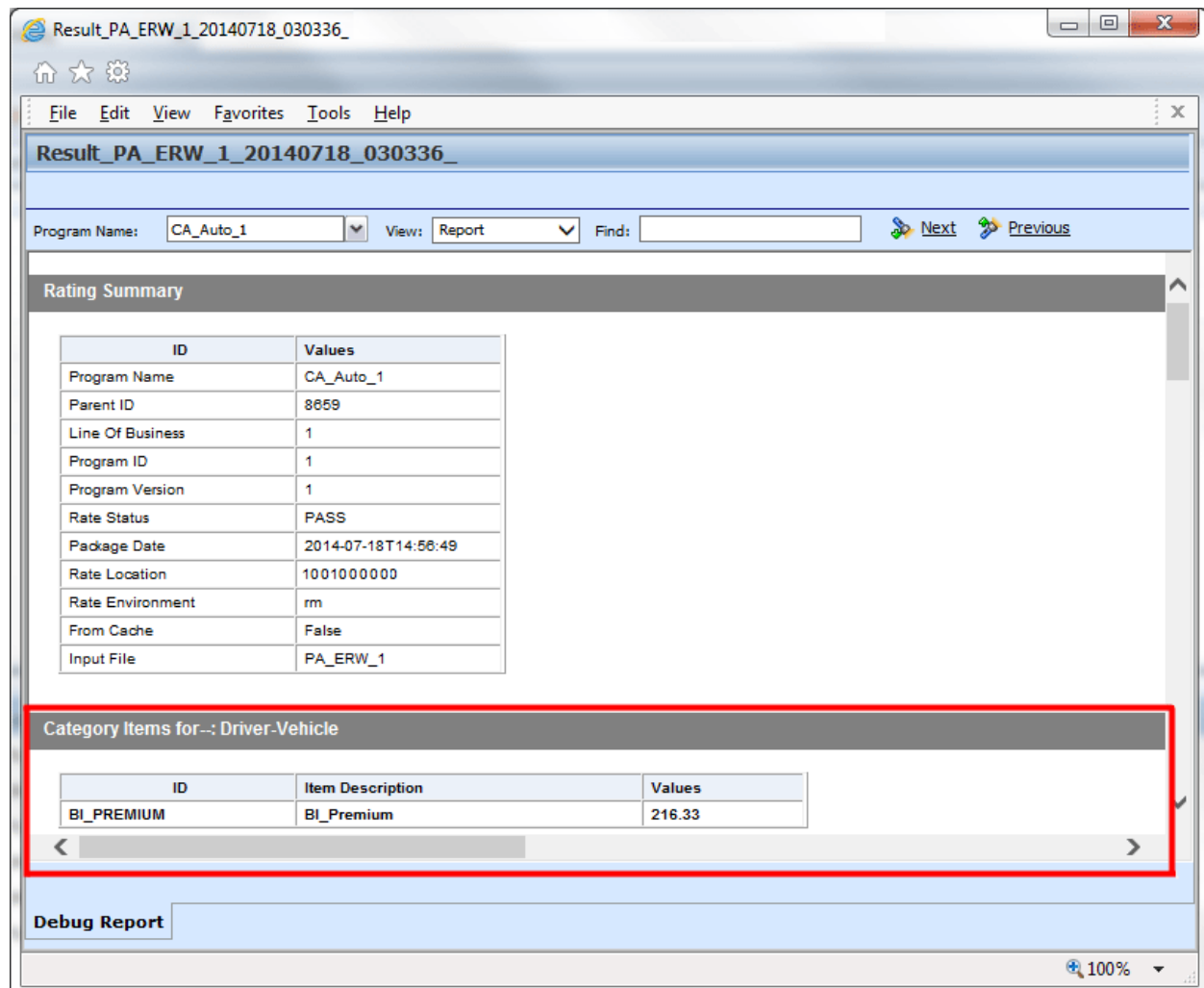


Figure 21 Rating Report with Debug

Fields

- **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.

The Program Inputs can be viewed in the Insbridge XML Viewer by clicking [Click to view Insbridge XML](#).

Debug Rating Report

The Debug Rating report includes detailed information about every algorithm, calculated variable and table variable executed.

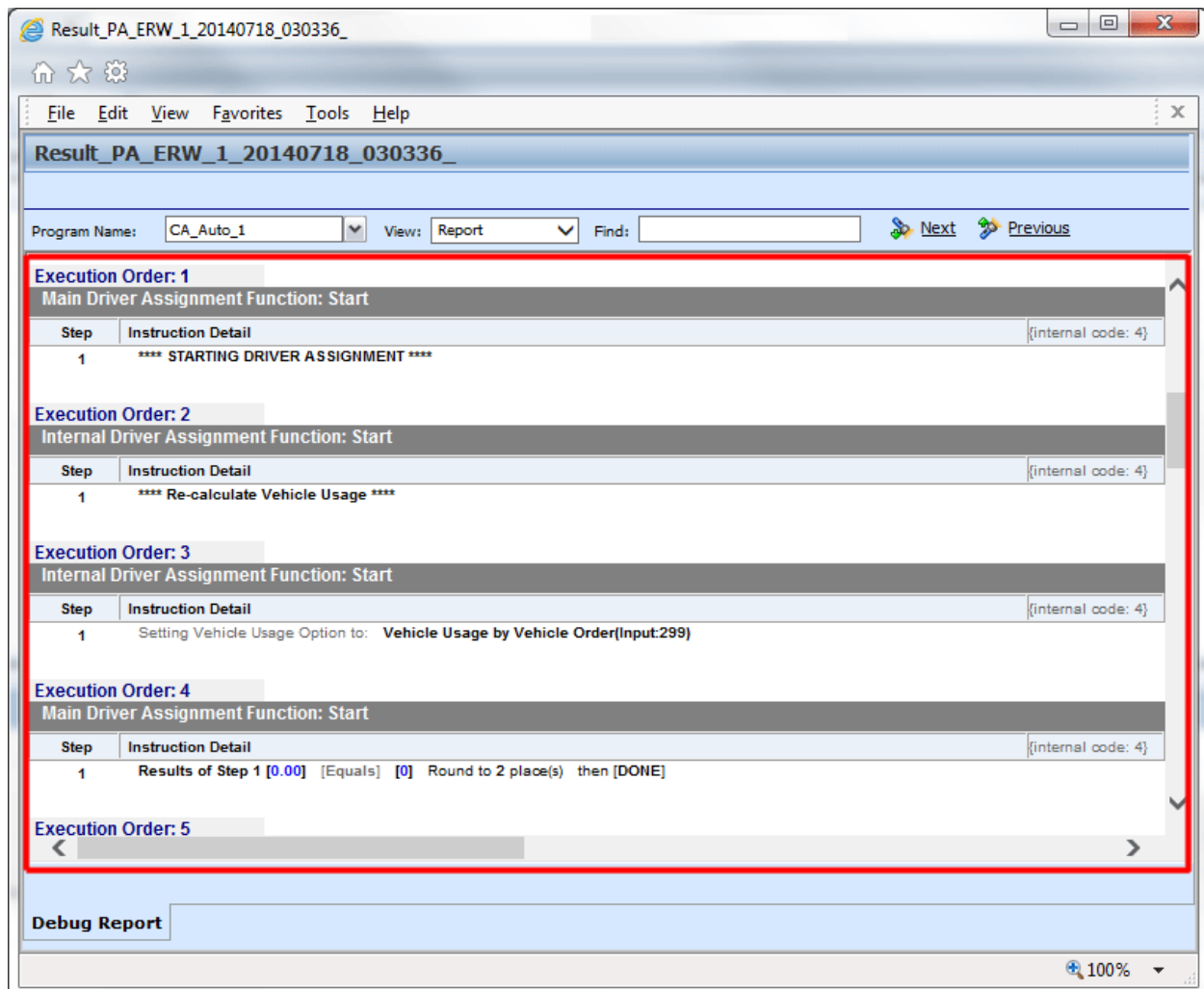


Figure 22 Debug Report showing Execution Order

Each element has:

- **Execution Order:** At the top of the field.
- **Element Type:** The gray bar contains the element type, the working category and the instance. If there is only one instance, the value is not listed.
- **Name of the Element:** The name of the element.
- **Criteria:** The criteria that was used.
- **Default Value:** If this value is grayed out, the value retrieved will be shown at the end of the row. If the default is red, this indicated that a value was not found and the default was used.

- **Algorithms:** The steps performed by the algorithm.

How a Table Variable is Shown on the Debug Rating Report

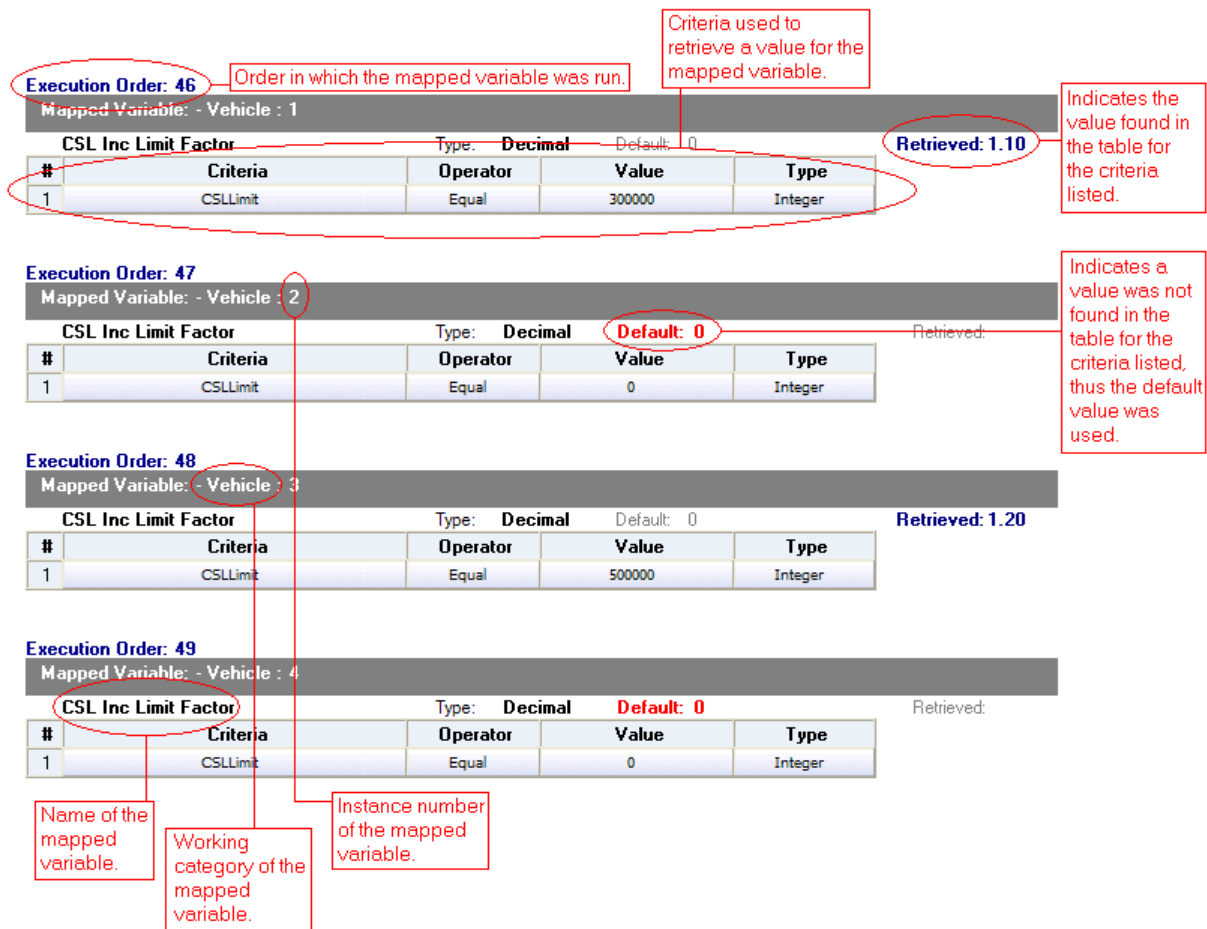


Figure 23 Debug Rating Report with Table Variable Highlighted

Execution Order: 2
Linked Table Variables: - Policy

1.	MartitalStatusCode	Type: String	Default: 0	Retrieved: M
2.	GNCD	Type: String	Default: 0	Retrieved: F
3.	DriverAge	Type: Integer	Default: 0	Retrieved: 34
4.	CLCD	Type: String	Default: 0	Retrieved: 2A
5.	CLFCBIPD	Type: Decimal	Default: 0	Retrieved: 1.01
6.	CLFCMP	Type: Decimal	Default: 0	Retrieved: 0.99
7.	CLFCCOMP	Type: Decimal	Default: 0	Retrieved: 0.84
8.	CLFCCOLL	Type: Decimal	Default: 0	Retrieved: 0.92
9.	DriverAge2	Type: Integer	Default: 0	Retrieved: 34

#	Criteria	Operator	Value	Type
1	ClassCode	Equal	12	Integer

Figure 24 Linked Table Variable in a Debug Report

How an Algorithm/Calculated Variable is shown on the Debug Rating Report

Execution Order: 82 Order in which the algorithm was run.

Step	Instruction Detail
1	Results of Step 1 [82.50] [Equals] CSL Base Rate [75] [Multiplied By] CSL Inc Limit Factor [1.1000000000] Round to 2 place(s) then goto [Step 2]
2	CSL Premium [107] [Equals] Results of Step 1 [82.5000000000] [Multiplied By] Primary Class Factor [1.3000000000] Round to 0 place(s) then [DONE]

Execution Order: 83

Step	Instruction Detail
1	Results of Step 1 [0.00] [Equals] CSL Base Rate [75] [Multiplied By] CSL Inc Limit Factor [0] Round to 2 place(s) then goto [Step 2]
2	CSL Premium [0] [Equals] Results of Step 1 [0] [Multiplied By] Primary Class Factor [1.1500000000] Round to 0 place(s) then [DONE]

Execution Order: 84

Step	Instruction Detail
1	Results of Step 1 [90.00] [Equals] CSL Base Rate [75] [Multiplied By] CSL Inc Limit Factor [1.2000000000] Round to 2 place(s) then goto [Step 2]
2	CSL Premium [90] [Equals] Results of Step 1 [90] [Multiplied By] Primary Class Factor [1] Round to 0 place(s) then [DONE]

Execution Order: 85

Step	Instruction Detail
1	Results of Step 1 [0.00] [Equals] CSL Base Rate [75] [Multiplied By] CSL Inc Limit Factor [0] Round to 2 place(s) then goto [Step 2]
2	CSL Premium [0] [Equals] Results of Step 1 [0] [Multiplied By] Primary Class Factor [1.1000000000] Round to 0 place(s) then [DONE]

Name of the algorithm. Working category of the algorithm. Instance number of the algorithm.

Shows the name of the variable and the value associated with it. In this case, the value came from the mapped variable table shown above.

Steps in the algorithm.

Figure 25 Debug Rating Report with Algorithm/Calculated Variable Highlighted

How an Underwriting Rule is shown on the Debug Rating Report

Execution Order: 22

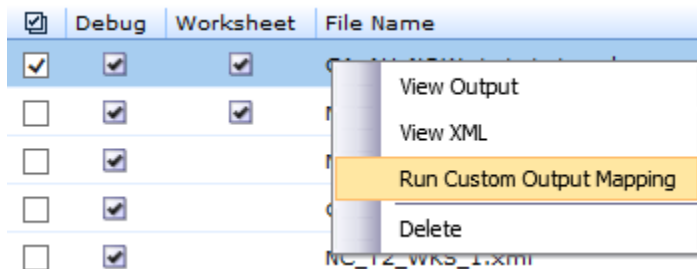
Step	Instruction Detail
1	Results of Step 1 [0.00] [Equals] FLTNum [0] Round to 2 place(s) then goto [Step 2]
2	Set String [Use Fleet Rates.]

Figure 26 Underwriting Rule in a Debug Report

Run Custom Output Mapping

You can use a custom output mapping file on any result file.

1. Select the result file where you want to use custom output mapping.
2. Right click and select **Run Custom Output Mapping**. A separate screen is shown.



3. The Subscriber, Product, Program and Version cannot be changed.

RateManager 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 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.

Input File: Auto_custom_5029.xml
Result Scenario: Result_test_20130918_030025_
Subscriber: 8659
Line: 0
Program: 3
Version: 1
Type: CUSTOM
Identifier: -- Search Results: 2 Mapping(s) Found --

Buttons: Transf., Close

4. You can select a different **Input File** from the drop down menu.
5. A different **Type** can be selected, if needed. There are two options; Local and Custom.
6. You can select another **Identifier** from the drop down menu. The options may be filled in when you select the File. Otherwise, click Search to obtain a list of custom output mapping files associated with this file

7. Click **Transform**. The changes are applied and a View XML screen is displayed.

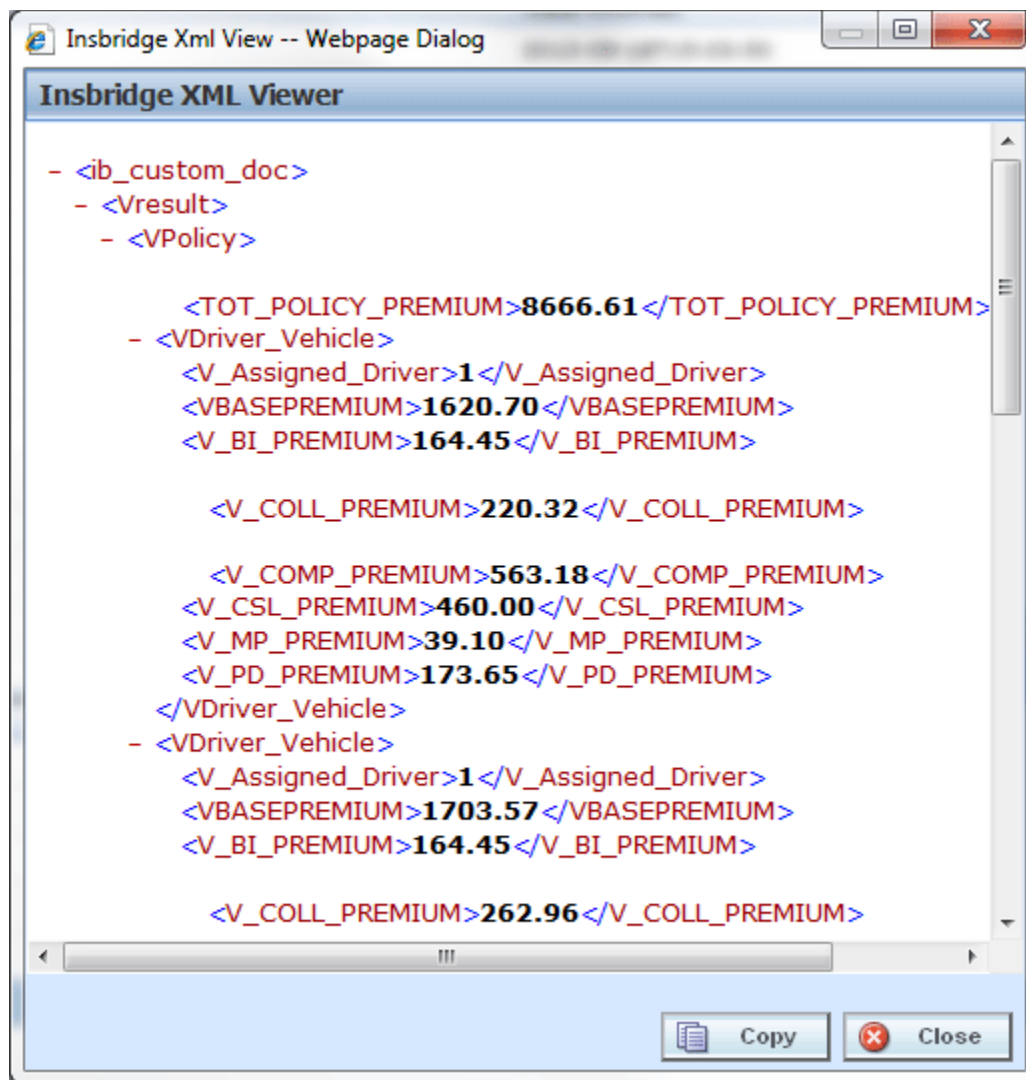


Figure 27 Using Custom Output Mapping

8. Your file is associated with the custom XML output mapping you selected. The result is ready to be viewed.

Deleting a Result File

If a result file is no longer needed, it can be deleted. Make sure this is the action you want to take. Deletes cannot be undone.

1. Select the file you want to delete.
2. You can either click **Delete** from the top bar menu or right click and select **Delete**.

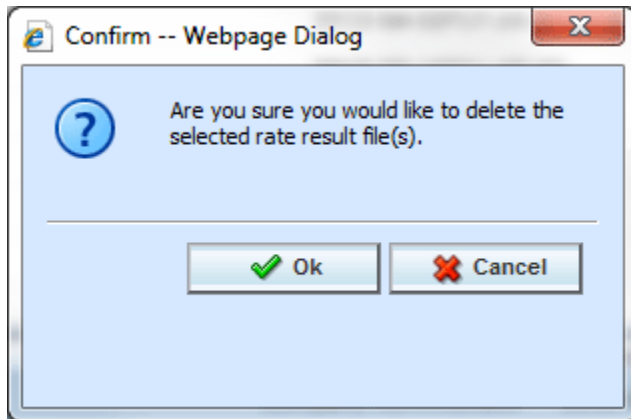


Figure 28 Deleting a Result File

3. A warning message is displayed. Click **OK** to remove the file. If this is not the screen you want click Cancel.
4. The file is removed.

REPORT ERRORS

In the event that you have an error, a red banner will be displayed with the reason for the failure listed underneath.

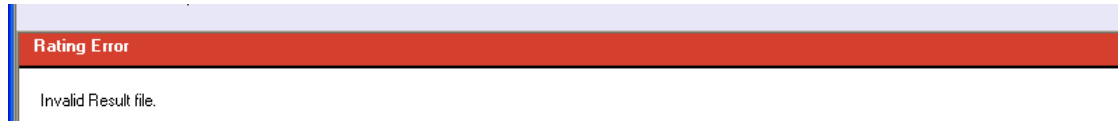


Figure 29 Report Errors

Errors when Rating a File

You might receive an error when they try to rate a file.

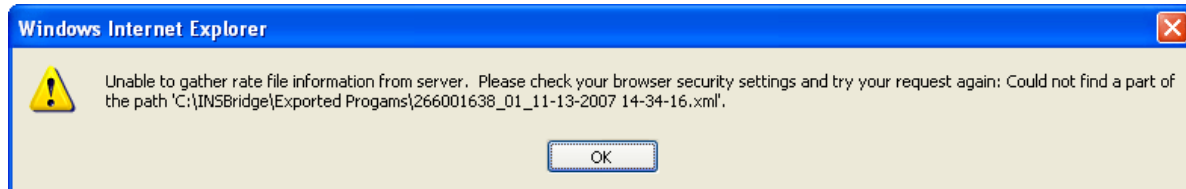


Figure 30 Error Message for Rating a File

Possible causes of this error:

1. The file is located on a computer (or a mapped network drive) where the security settings are preventing Insbridge from getting the file. You either need to adjust your 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 file does not exist at the location specified. Check to be sure the file actually exists.

NOTE: *If a file is moved to a different location, 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.*

Chapter 2

IMPACT ANALYSIS

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

Impact Analysis contains two *sub-tabs*:

- **Batch Files:** This sub-tab 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 the Reporting sub-tab.
- **Reporting:** This sub-tab is where you can compare two complete sets of data, such as a data set containing current rates and another containing a proposed rate change.

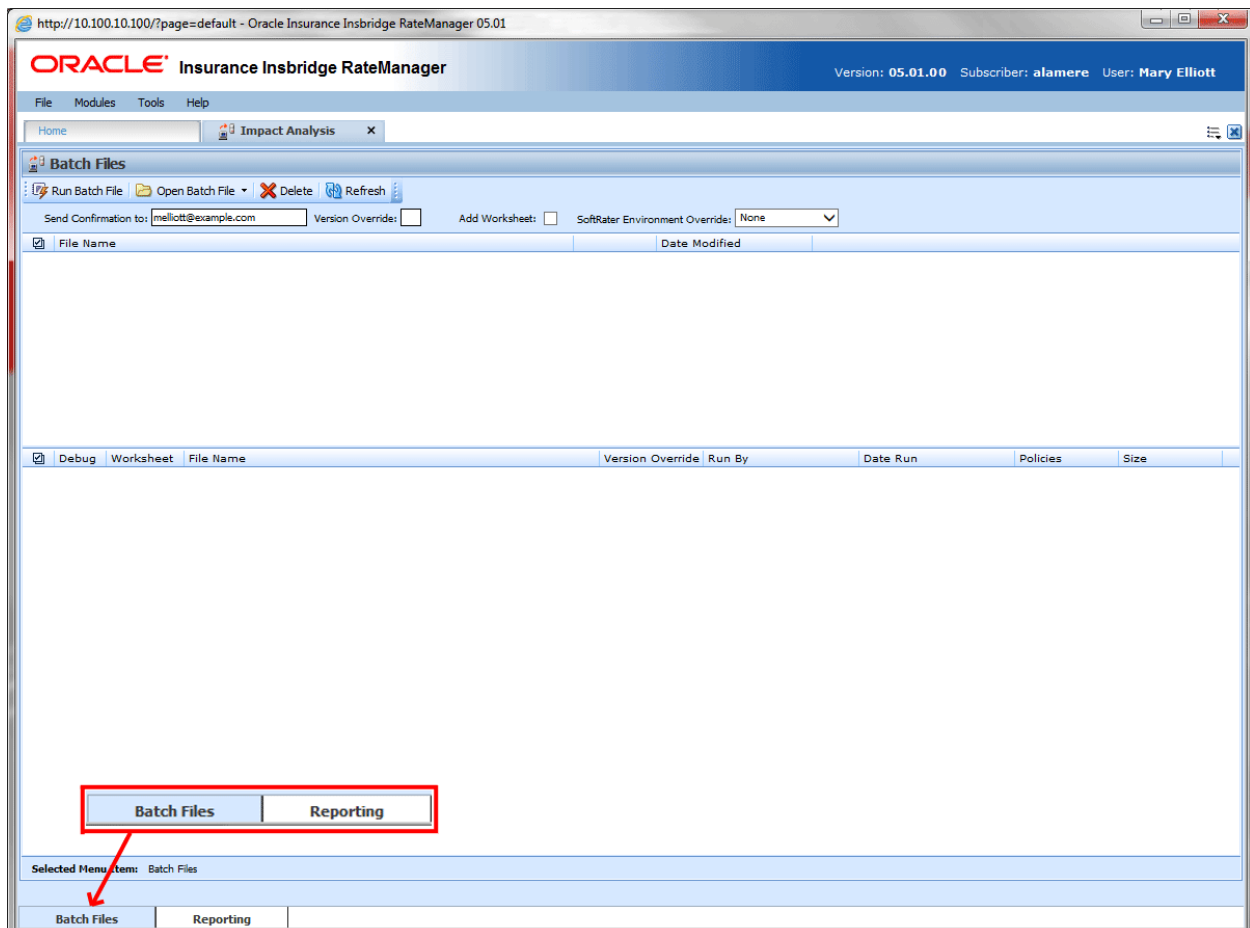


Figure 31 Impact Analysis Tab

The **Selected Menu Item** displays the sub-tab you are currently using.

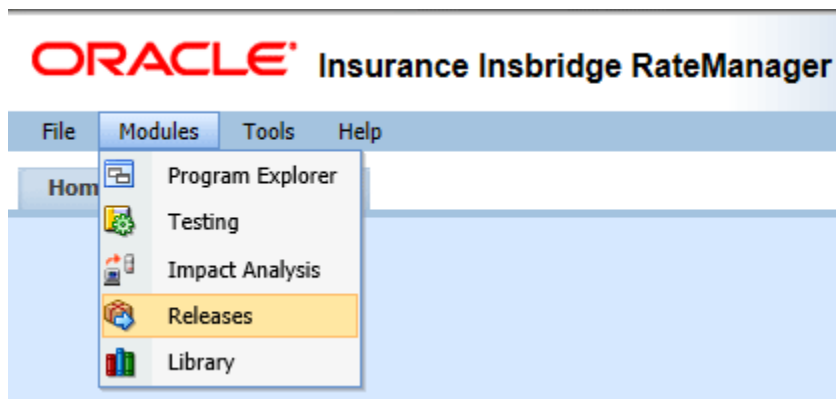
PREPARATION

Batch files are required when working with Impact Analysis.

Before running a Scenario report, you must first identify the two programs or program versions to be compared. Programs must be packaged and should be in the same product. It is recommended that you keep products together to allow for a more accurate and relative comparison.

Batch Packaging Location

If you have a large number of programs to package, the Releases Module contains the batch packaging option. *Modules→Releases→Packaging*



NOTE: *If you do not have Releases as a menu option, please contact your system administrator to request Release rights.*

For more information on working with batch packaging, please see Releases on page 91.

Preparing a Batch Input File

Batch Files 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 on the Reporting sub-tab. The first step is to create a batch input file or 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 computer or on a mapped network drive are not available.*

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

Batch Input Files

There are two types of batch input files:

- Individual File:** An individual batch input file consists of multiple XML input files surrounded by a batch header. Since the batch file consists of many input files, it is recommended that an additional element (PolicyNumber) is added to the rate node for each file. Although not required, this element lets you distinguish between the files when viewing an Impact Analysis result report. Files retain their original name.
- Group Folder:** A group of batch input files under one folder. Each input file has the same header information and all the files are contained within one folder. Groups folder are designated with a *.xml extension. The file name does not remain the same as the folder. If you want to use a group folder result, make sure you save the confirmation email from any group folder batch. The result file name is listed on the email.

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 in Figure 30, (<ibdoc> is used as the XML wrapper):

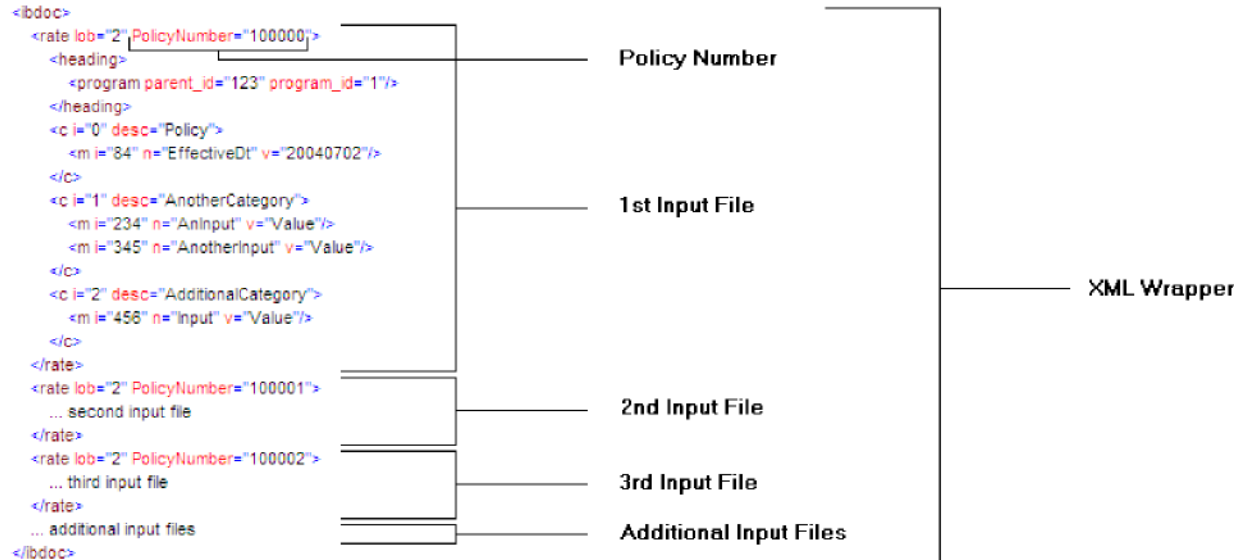


Figure 32 Example of a Batch XML File

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 an Impact Analysis 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 causes 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 an Impact Analysis report, the baseline and comparison files names will be the result file name on the email and not necessarily the folder name.

NOTE: Use an asterisk if you want to rate a group of files in a directory. An option has been added to the Open Batch File Dialog window to "Rate all files in this directory". Browse to the directory where you have the multiple files you want to rate. Select one file and then select the "Rate all files in this directory" option. The file path will be modified, replacing the file name with an asterisk.

Result Mapping in Batch Files

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

NOTE: When using custom XML in Impact Analysis and Releases→Packaging, 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 rating process. Please see the Oracle Insurance Insbridge Enterprise Rating RateManager User Guide, Input and Output Mapping for more information.

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

Batch Results with New Line

In Batch Files, 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) is 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 results in one continuous string without a break. Please see the RateManager Tools User Guide for more information.

Using an IBSS Instance

Impact Analysis is set up to run on the same server where RateManager is located. A setting in Preferences, the Impact Analysis Messaging Server setting, allows for select SoftRater Server (IBSS) instances to be used when running scenarios through Impact Analysis.

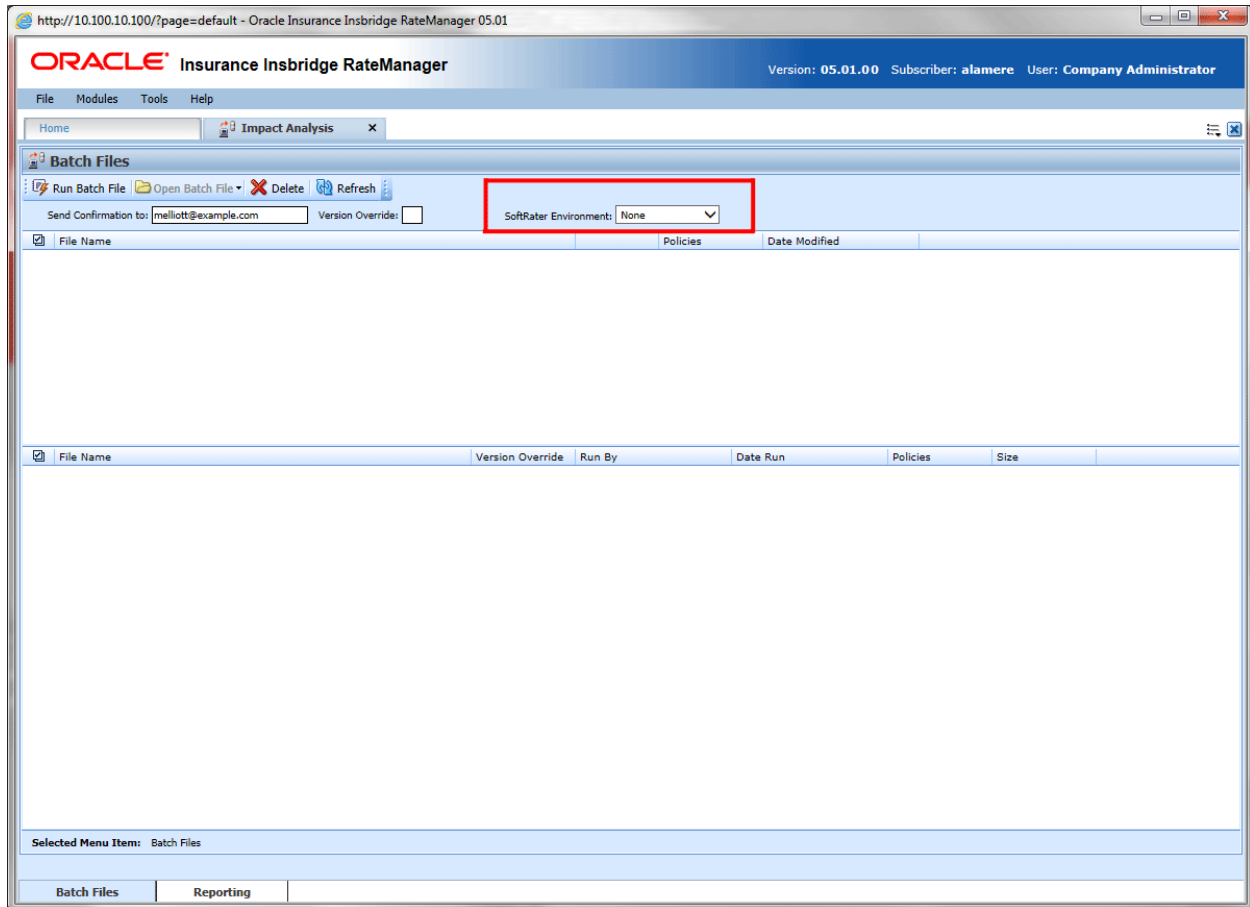


Figure 33 Impact Analysis Utilizing a SoftRater Server Environment

Only an Inbridge SoftRater Server (IBSS) utilizing an Oracle database can be entered. When an IBSS instance utilizing an Oracle database is entered, the environments on the instance will populate Impact Analysis and Impact Analysis will query against the Oracle database.

NOTE: All environments are presented. If there is an environment that does not utilize an Oracle database, no results are returned.

If localhost is used on the Preferences screen, Impact Analysis runs queries against the disk where batch files are stored.

When configured, the override option is removed from the Batch Files tab and replaced with a listing of environments located on the SoftRater Server instance. When running a batch file, select the environment where you want to rate.

The option to Open Batch Files is also removed. You cannot upload any files from RateManager. The files are loaded from the DBRuntime screen on IBSS or via ESI for Java. If the files you need are not listed, return to the IBSS instance and verify that the files have been loaded there.

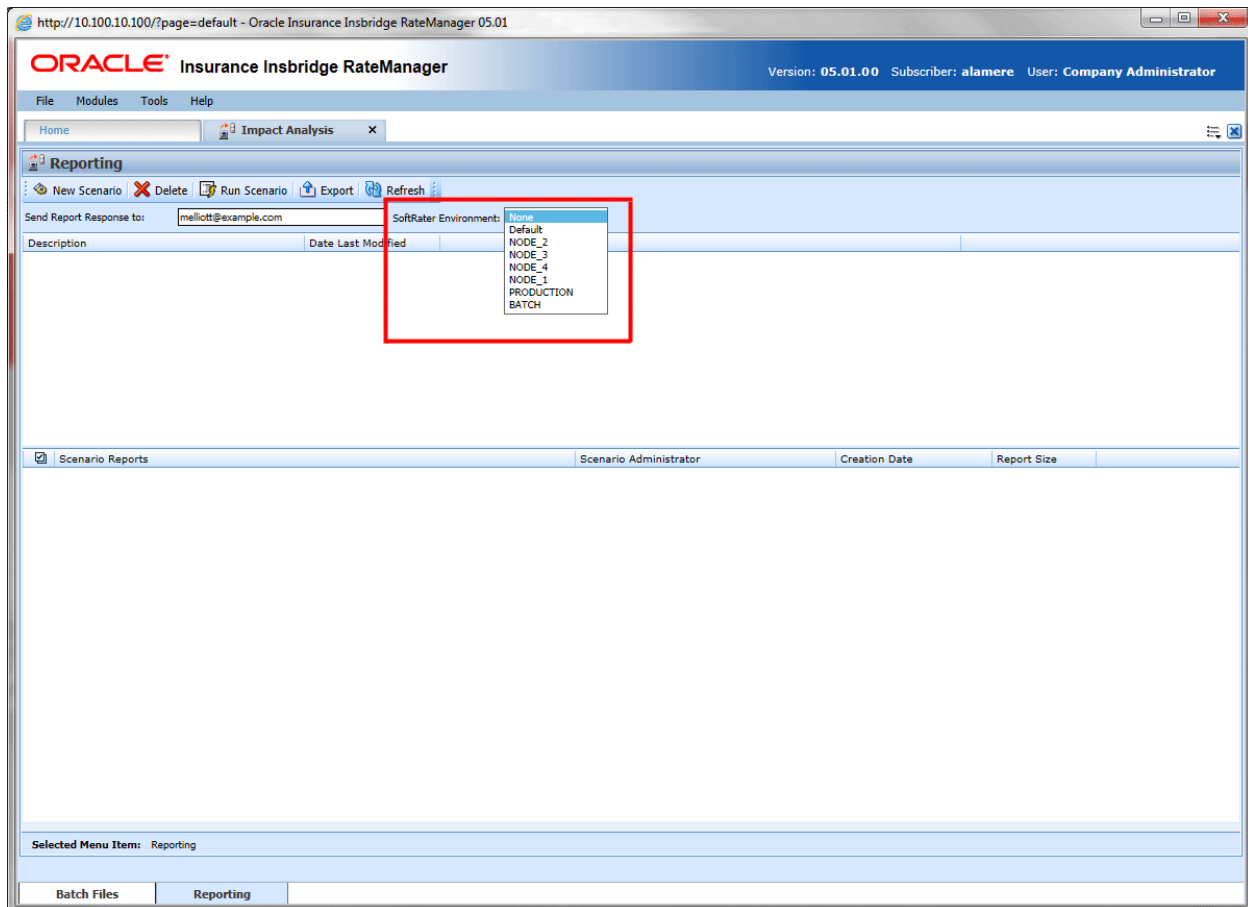
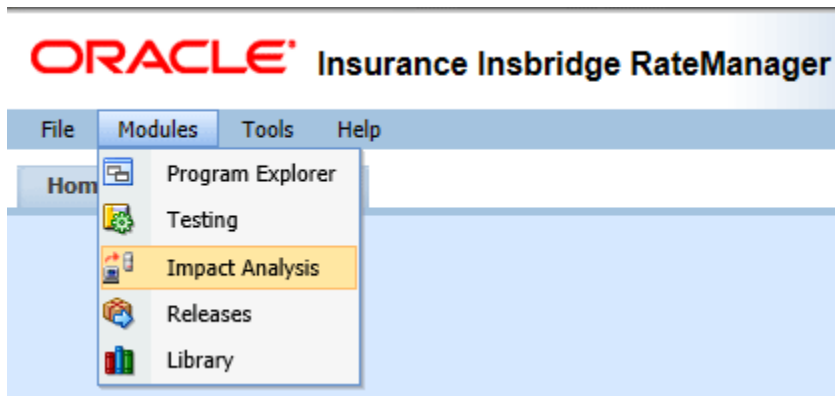


Figure 34 Reporting Utilizing a SoftRater Server Instance

On the Reporting tab, a listing of environments located on the SoftRater Server instance is presented. Select the environment and corresponding scenario results are listed.

Navigating to Impact Analysis

1. Select Modules→**Impact Analysis**.



2. This opens the Impact Analysis→**Batch Files** sub-tab. The default view is Batch Files. To go the Reporting, click the **Reporting** sub-tab.

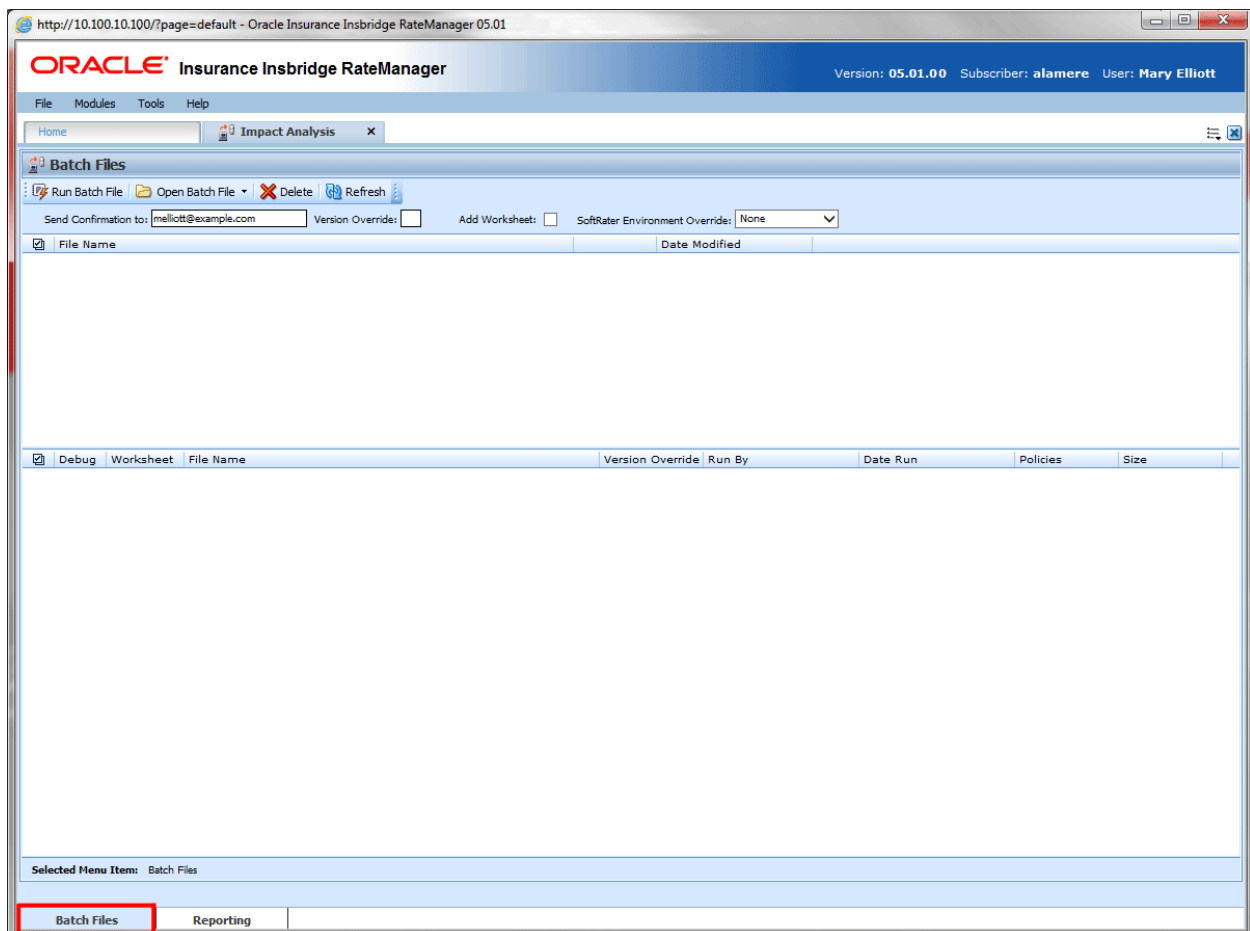


Figure 35 Impact Analysis Batch File

BATCH FILES

The first sub-tab is Batch Files. Batch Files is where you perform batch rating. Batch rating 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.

- The upper portion of the sub-tab is the **XML Input Files Listing**. This area is populated with the XML files that you have created and brought into Batch Files.
- The lower portion of the sub-tab is the **Result File Listing**. This area is populated with the result files that are generated when you run the batch XML input files.

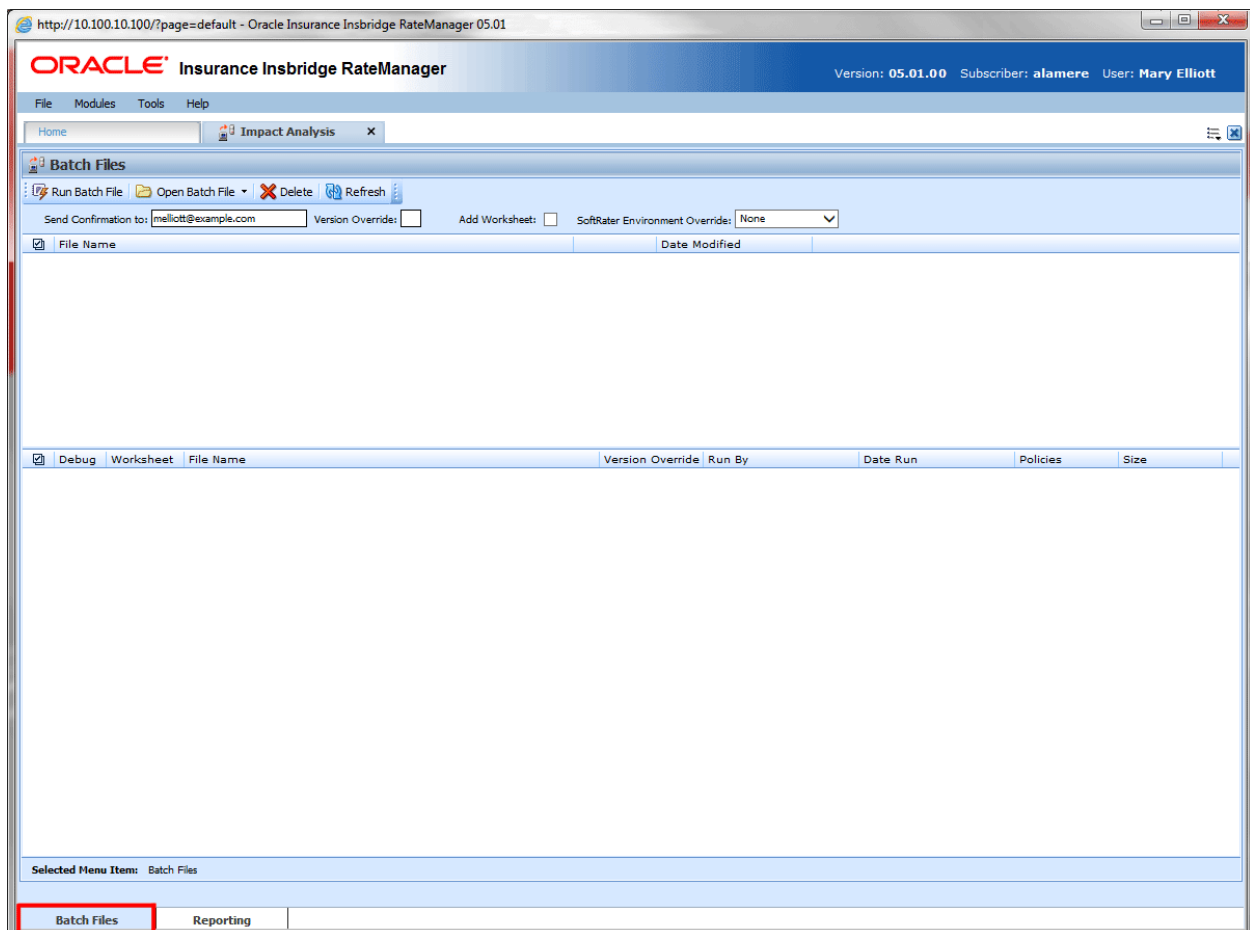
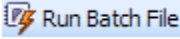
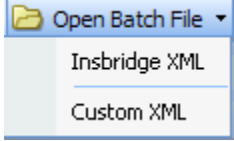
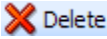
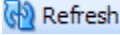


Figure 36 Batch Files Sub-Tab

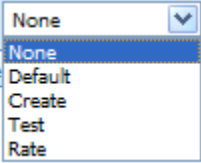
FUNCTIONALITY

The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

	<p>Run Batch File: Rates an existing/displayed input file. To use, place a check in the box next to the File Name and select this option.</p> <p>NOTE: You can also rate an existing/displayed input file by double clicking it.</p>
	<p>Open Batch File: Opens a browser window where you can select an input file to rate. There are two options:</p> <ul style="list-style-type: none"> • Insbridge XML: Opens a browser window where you can select a file that is in Insbridge.XML format. • Custom XML: 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 the mapping to use that will transform the input file into an Insbridge.XML format.
	<p>Delete: Removes the selected file(s).</p> <p>NOTE: For input files, this does not delete the actual XML file.</p>
	<p>Refresh: Refreshes the listing of input and result files.</p>

Definition Options

Definition options allow you to further define the batch rating. Send Confirmation is the only required option.

<p>Send Confirmation to: <input type="text"/></p>	<p>Send Confirmation to: Provides a place where you can enter an email address that receives notification when the rating is complete. If an admin email has been entered in IBFA, that email is used.</p> <p>This is a required field.</p>
<p>Version Override: <input type="text" value="1"/></p>	<p>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.</p>
<p>Add Worksheet: <input type="checkbox"/></p>	<p>Add Worksheet: If you want to add any worksheets associated with the programs, check to add worksheet.</p>
<p>SoftRater Environment Override: </p>	<p>SoftRater Environment Override: Choose this option if you want to override the rating environment.</p> <ul style="list-style-type: none"> • None: no override is used. 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: <i>If you select Default or another environment, any defined environments in your ratings will be ignored.</i>
--	---

FIELDS

The fields on the tab are divided over two areas:

- The upper portion of the tab is the **XML Input File Listing**. This area lists the input files that are being batch rated.
- The lower portion of the tab in the **Result File Listing**. This area lists the result files that are being returned.

XML Input File Listing

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

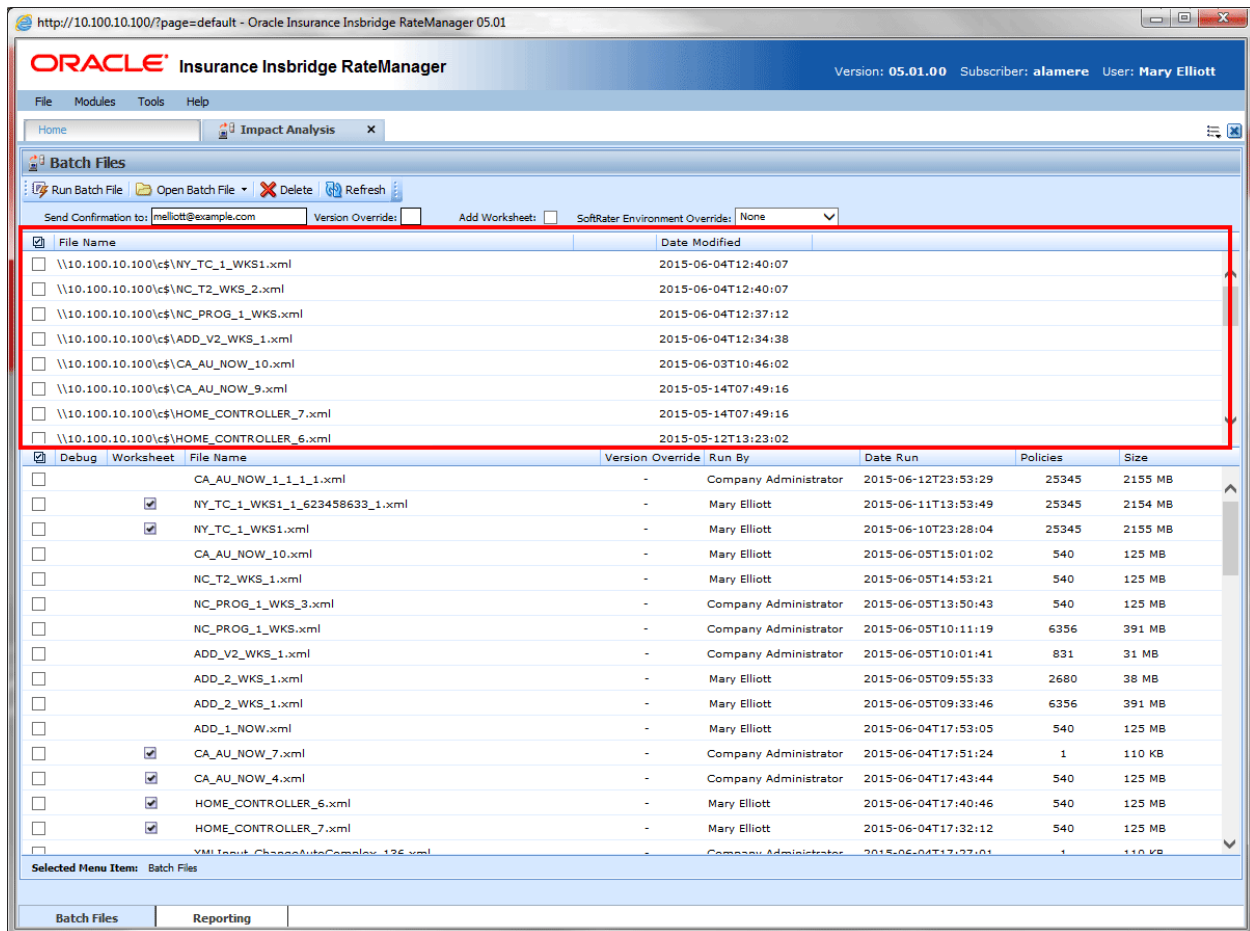


Figure 37 XML Input File Listing Area

Check Box: Used to select multiple files to delete or a single file to rate.

File Name: Displays the pathway of the input file.

Date Modified: 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 in report format, double-click it.

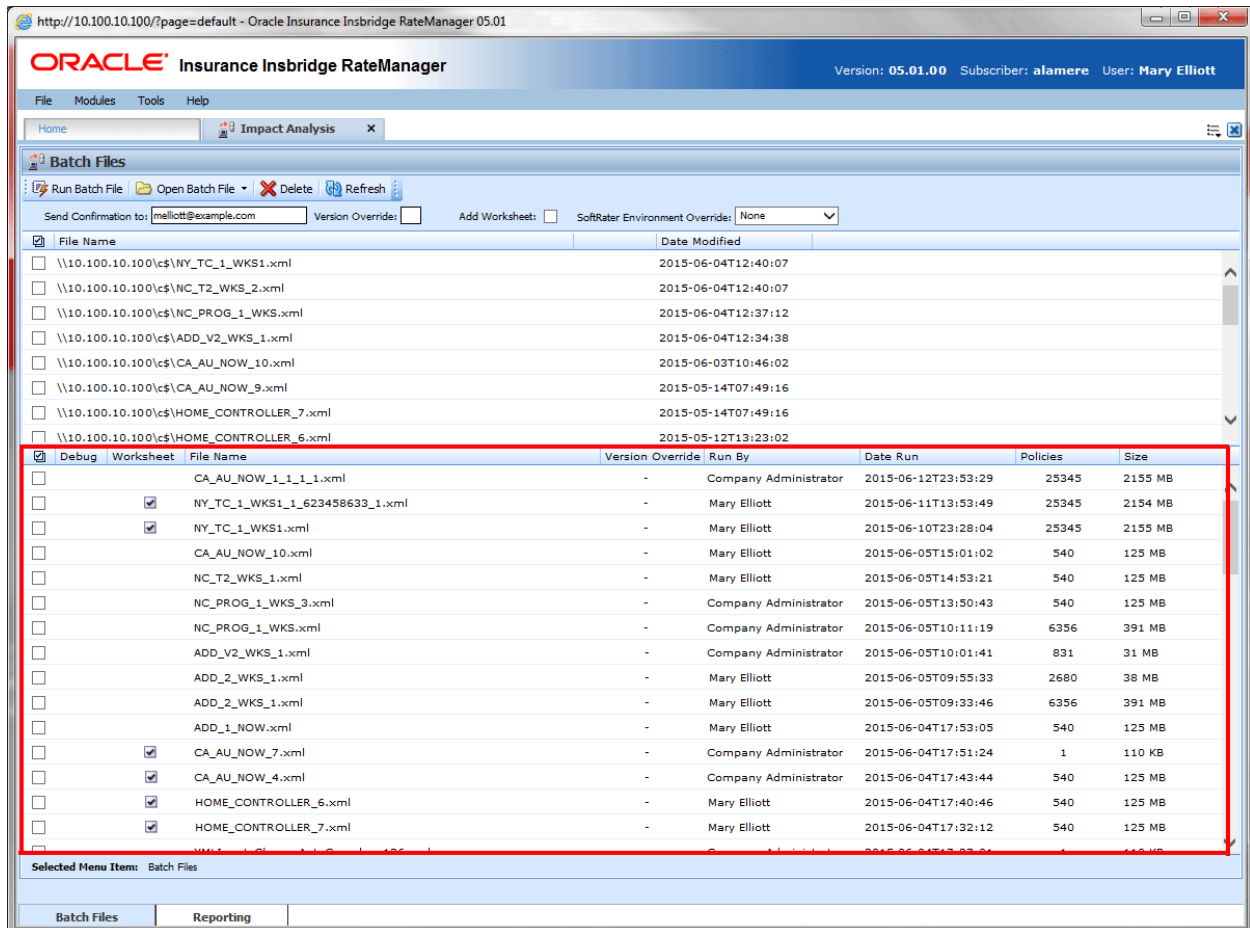


Figure 38 Result File Listing

Check Box: Used to select multiple files to delete.

Debug: This field is no longer used. Debug reports are available on the Testing tab and in Test Case Editor.

Worksheet: A checkmark indicates that the worksheets associated with the programs are included.

File Name: The name of the result file.

Version Override: Displays the version override that was used. A hyphen in the column indicates that no version override was used.

Run By: The user that rated the file.

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

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

Size: The size of the result file.

Right Click Options

Every File Name entry has right click menu options. To view the right click menu options, select the file you want and right click.

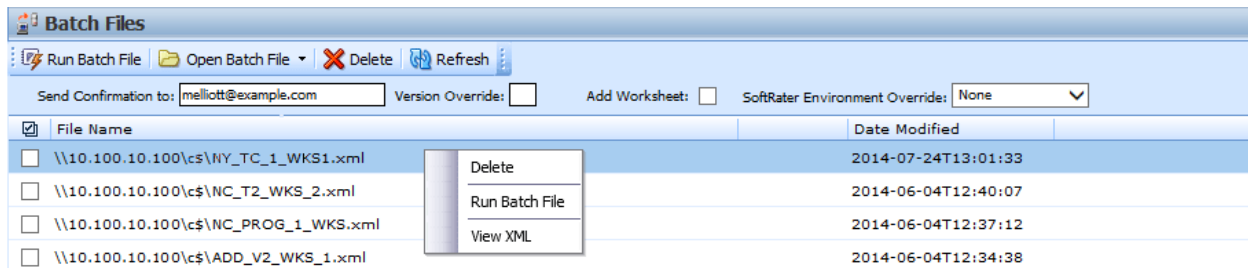


Figure 39 Right Click Menu for the XML Input File Listing

The **XML Input File Listing** has three choices:

- **Delete:** Removes the selected file.
- **Run Batch File:** Rates the selected file.
- **View XML:** Allows you to view the selected XML file. Multiple files cannot be viewed.

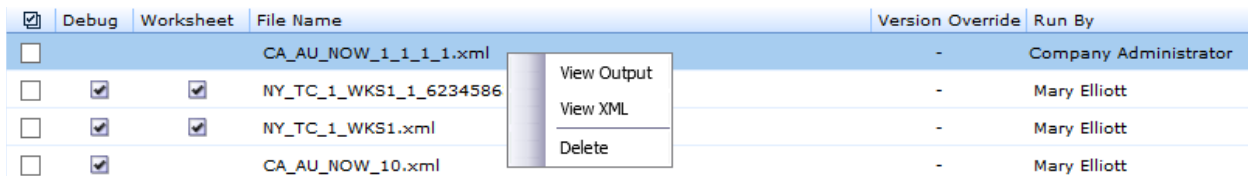


Figure 40 Right Click Menu for Result File Listing

The **Result File Listing** has three choices:

- **View Output:** Allows you to view the output in report format.
- **View XML:** Allows you to view the selected XML file.
- **Delete:** Removes the selected file.

Rating an Insbridge XML Batch File

1. Enter an email address into the **Send Confirmation 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. If an admin email has been entered in IBFA, that address is displayed.
2. 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.

3. If you want to add the worksheet associated with the program, check Add Worksheet.
4. If you want to override the SoftRater rating environment, choose the environment you want from the listing.
5. If the file to be rated is already listed in the input file listing, it can be rated by selecting it and clicking **Run Batch File** or by double-clicking the file.
6. If the file to be rated is not listed, click **Open Batch File** and select **InsBridge XML**. A browse box opens for you to select the file to rate.

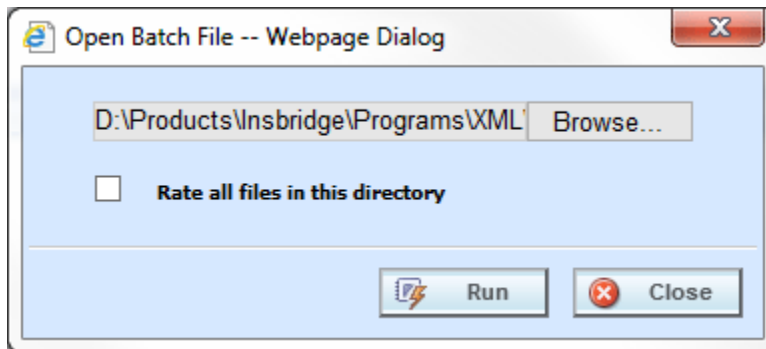


Figure 41 Entering a Batch File Name

7. If the file location is a directory, check the Rate all files in this directory option. When you are finished, click **Run**.
8. A message notifies you that your request has been submitted for processing.

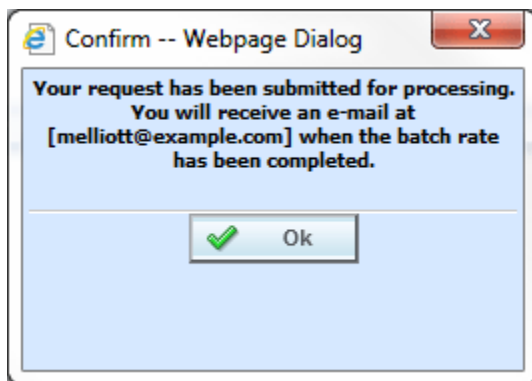


Figure 42 Confirmation Message for Batch Rate Request

8. The send confirmation email address receives an email when the file is finished rating. The result file is displayed in the lower portion of the screen and can now be used in an Impact Analysis scenario or the result XML can be viewed by double-clicking the result file.

Rating a Custom XML Batch File

Input files that are custom XML can be rated using Impact Analysis. You need to have some file information ready: Project number, Program number, Version number and Root name.

1. Enter an email address into the **Send Confirmation 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. If an admin email has been entered in IBFA, that address is displayed.
2. Leave the **Version Override** box blank. You will select the version to use in the batch file details.
3. If you want to add the worksheet associated with the program, check Add Worksheet.
4. Leave the **SoftRater Environment Override** to **NONE**.
5. If the file to be rated is already listed in the input file listing, it can be rated by selecting it and clicking **Run Batch File** or by double-clicking the file.
6. If the file to be rated is not listed, click **Open Batch File** and select **Custom XML**. A separate screen is displayed where you can select the file to rate.

Open Batch File

Impact Analysis 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 run**, 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 Name:

☐ **Rate all files in this directory**

Subscriber:

Line:

Program:

Version:

Root Name:

Type:

Identifier:

Figure 43 New Rate Custom Batch File Dialog Box

7. Click **Browse...** to find a file to rate.

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.

8. If the file location is a directory, check the Rate all files in this directory option.
9. Enter in the **Project**, **Program** and **Version** numbers. The Subscriber number defaults to your current number.
10. 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 Figure 40, **Quote** is the element that marks the beginning and end of each quote.

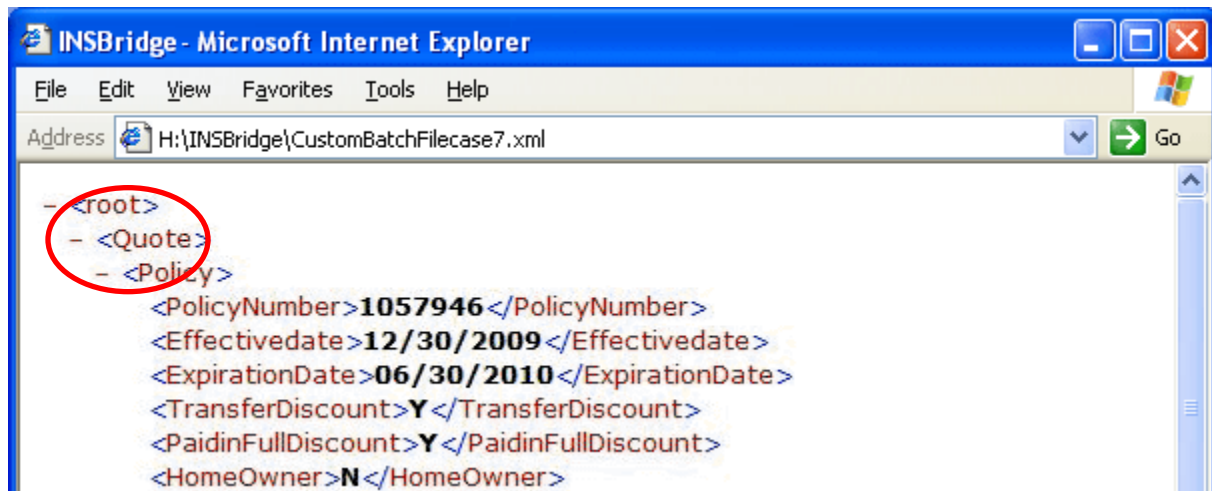


Figure 44 Example Custom Batch File

11. Select the input mapping **Type**. There are three options; Project, Version, and Custom. Project uses XSLT created for the project (all inputs for the project), Version uses XSLT created for a specific version (only inputs used by a specific version) and custom uses a custom XSLT created outside of the RateManager mapping tool.
12. Any mapping needed to transform the input file into Insbridge.XML format will be in the **Identifier** field. Select the Identifier to be used for this rating. The options are filled in after you select the File Name at the top of the popup. You also can use **Search** to find the file you need.
13. When you are finished, click **Run**. Your file will be rated and the result file will show in the result file listing.
14. A popup message notifies you that your request has been submitted for processing. If a different message is received, see Batch Errors.

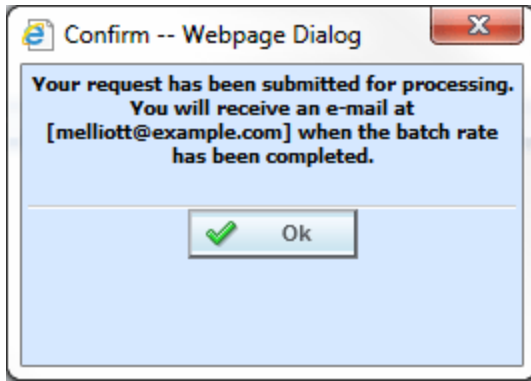


Figure 45 Confirmation Message for Batch Rate Request

15. The send confirmation email address receives an email when the file is finished rating. The result file is displayed in the lower portion of the screen and can now be used in an Impact Analysis scenario or the result XML can be viewed by double-clicking the result file.

Re-Running a Custom Batch File

You can rerun a custom batch file without changing the mapping information by using the right click menu or double clicking the custom XML file. This will cause the file to run again without presenting the mapping options.

1. Select the custom XML file you want to rerun and right click.
2. Select **Run Batch File**. This will run the batch file. The Custom XML File window where you can select mappings will not be presented.
3. Results are displayed below.

Using the right click menu may save some time if you do not have any changes to the mapping file. This option can be used after the first initial run.

You also can double click the file to immediately rerun the batch file.

NOTE: If you want to change the mapping information, you must click the **Run Batch File** option in the top bar menu.

Rate All Files in This Directory

The directory path to the batch file cannot be edited manually. You must browse and select. To rate a group of files in a directory, you must check the "Rate all files in this directory".

Browse to the directory where you have the multiple files you want to rate. Select one file to rate and then select the "Rate all files in this directory" option. The file path is modified, replacing the file name with an asterisk.

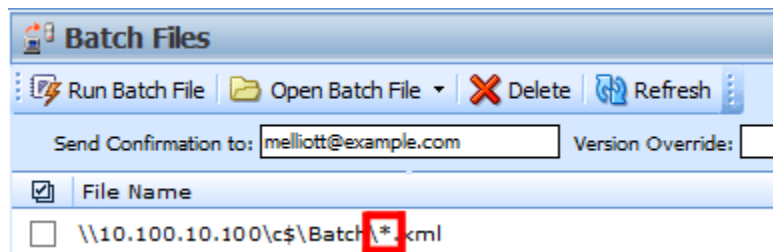


Figure 46 Asterisk Denoting to Rate All Files

Deleting a Batch File

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

To Delete an Input File

1. Navigate to the **Batch Files** sub-tab.
2. Select the input file or result file you wish to delete and click **Delete**.
3. You will be asked to confirm deletion.

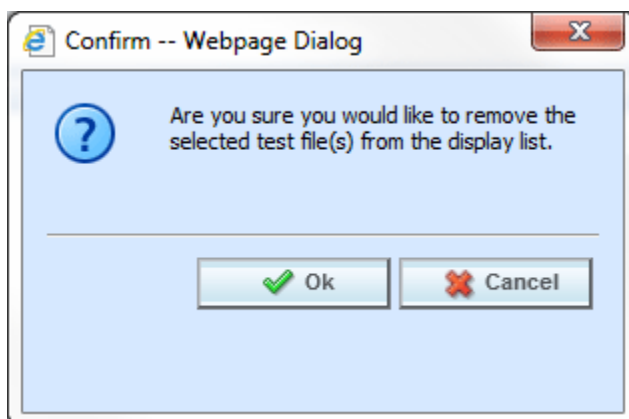


Figure 47 Delete Input File Message

4. Click **OK** to delete the file. Click **Cancel** to return to the Batch Files sub-tab without deleting the input file.

Batch Error Messages

If you rate a batch file and receive the following message, it means that an administrator needs to start the Insbridge Message Service in Insbridge Framework Administrator (IBFA). Once the service is started, the request will be submitted and processed.

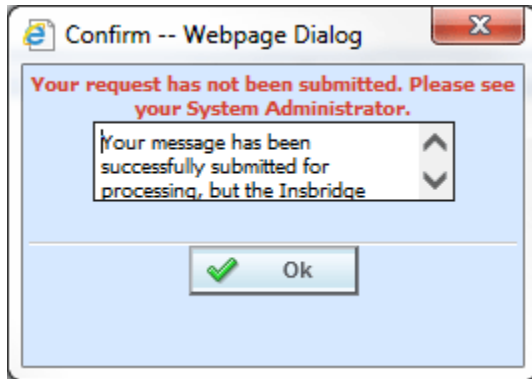


Figure 48 Error Message for Batch Rate

If there was a problem when rating your batch file, the email you receive will list the problem. For example, the file could not be found or some element was missing.

If you do not receive an email regarding your batch file, there may be a problem with Insbridge Framework Administrator (IBFA) relaying messages. Please contact your system administrator to verify that emails are being relayed.

Failure to Run Error Message

If you receive a failure message when running Impact Analysis but are able to Batch, you may have an issue with the Controller database not being setup properly. If you have access, enter IBFA and verify that the controller database has been setup and that username and password are present. If you do not have access, please contact your system administrator to check the Controller database connection.

Oracle Support

5:39:21 PM Wednesday, October 02, 2013

Unable to process your request successfully.

Name: CAB Demo

BaseFile: C:\PROGRAM

FILES\ORACLE\IGBU\INSBRIDGE\Webs\RM4\Workfiles\Rating\DS_775\Batch\ALL_DIR_FILES_20131002_053405_BATCH_0.xml

CompFile: C:\PROGRAM

FILES\ORACLE\IGBU\INSBRIDGE\Webs\RM4\Workfiles\Rating\DS_775\Batch\ALL_DIR_FILES_20131002_053505_BATCH_0.xml

ResultFile: C:\PROGRAM

FILES\ORACLE\IGBU\INSBRIDGE\Webs\RM4\Workfiles\Pricing\DS_775\CAB Demo_1380753556665.xml

ERROR INFORMATION

StackTrace: ...

Message: Login failed for user ''. The user is not associated with a trusted SQL Server connection.

REPORTING

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

- Scenarios are listed in the Scenario Listing area after they have been created.
- Reports are listed in the Scenario Reports Listing after they have been run.

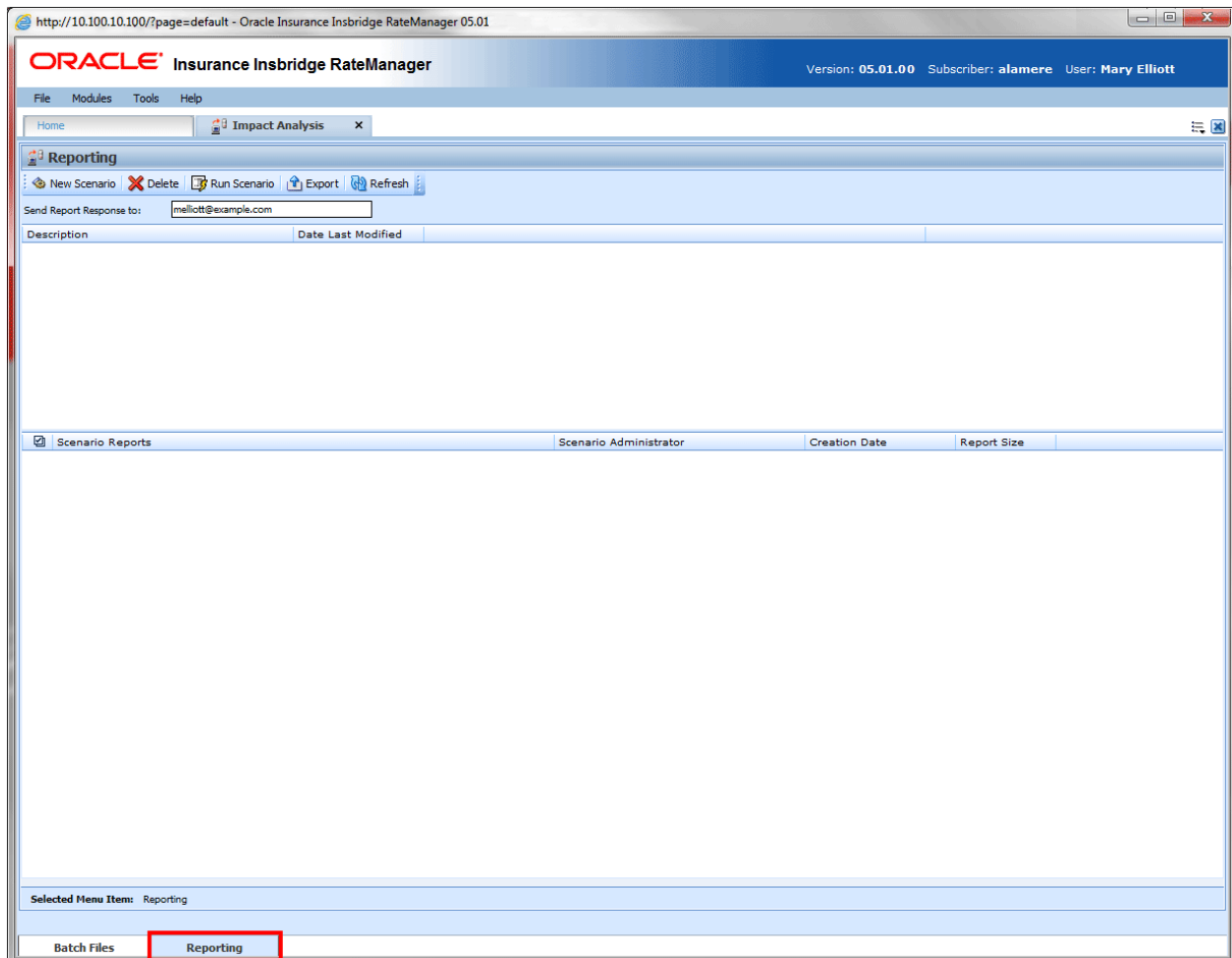







Figure 49 Reporting Sub-Tab

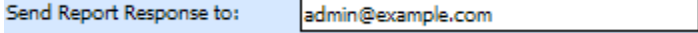
FUNCTIONALITY

The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

 New Scenario	New Scenario: Begins the process of creating a new scenario.
 Delete	Delete: Removes the selected scenario or the selected report(s).
 Run Scenario	Run Scenario: Submits the selected scenario for processing.
 Export	Export: Exports the selected scenario report in MS Excel format to a local drive or share.
 Refresh	Refresh: Refreshes the listing of scenarios and reports.

Definition Options:

The only definition option is the Send Report Response to field. This is a required option.

	Send Report Response to: Enter in an email address for the person to be notified when the report is ready for viewing. If an admin email has been entered in IBFA, that email is used. This is a required field.
--	---

FIELDS

The fields on the tab are divided over areas:

- The upper portion of the tab is the **Scenario Listing**. This area lists the scenarios that have been created.
- The lower portion of the tab is the **Scenario Reports Listing**. This area lists the reports that have been generated.

Right Click Options

There is one right click menu option for scenario reports. This option is only available in the Scenario Reports Listing area.

- **Rename:** Allows you to rename the selected report.

Scenario Listing

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

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

The screenshot shows the Oracle Insurance Inbridge RateManager web application interface. The top navigation bar includes the Oracle logo, the application name, version (05.01.00), subscriber (alamere), and user (Mary Elliott). The main menu includes File, Modules, Tools, and Help. The current page is 'Impact Analysis' under the 'Reporting' module. A toolbar at the top of the main content area includes buttons for 'New Scenario', 'Delete', 'Run Scenario', 'Export', and 'Refresh'. Below the toolbar is a 'Send Report Response to:' field with the email 'melliott@example.com'. The main content area displays a table of scenarios. A red box highlights the top section of the table, which includes the following data:

Description	Date Last Modified
100Scenario	Jul 19 2015 11:47AM
17918593_Report	Jul 19 2015 9:42AM
TestScenario	Jul 1 2015 11:41PM
TestScenario29	Mar 18 2015 5:36PM
myscenario	Jun 17 2015 6:39AM
Report1	Mar 19 2015 9:46AM
Report2	Mar 19 2015 9:51AM
SB_Scenario	Apr 14 2015 7:50AM
SB_Batch29	Jul 23 2015 9:48AM

Below the highlighted section, the table continues with columns for 'Scenario Administrator', 'Creation Date', and 'Report Size'. The scenarios listed include various 'TestScenario' and 'SB_Batch29' entries, all managed by 'melliott@example.com'. The bottom of the page shows a 'Selected Menu Item: Reporting' and a 'Batch Files' section.

Figure 50 Impact Analysis Scenario Listing

Scenario Reports Listing

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

Check Box: Used to select multiple reports to delete.

Scenario Reports: Name of the report.

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

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

Report Size: Size of the report.

Description	Date Last Modified	Scenario Administrator	Creation Date	Report Size
100Scenario	Jul 19 2015 11:47AM	melliott@example.com	6/3/2015 12:06:29 AM	5 KB
17918593_Report	Jul 19 2015 9:42AM	melliott@example.com	6/3/2015 12:02:51 AM	3 KB
TestScenario	Jul 1 2015 11:41PM	melliott@example.com	6/30/2015 12:45:52 AM	9 KB
TestScenario29	Mar 18 2015 5:36PM	melliott@example.com	6/29/2015 1:44:00 AM	1 KB
myscenario	Jun 17 2015 6:39AM	melliott@example.com	6/16/2015 4:04:20 AM	1 KB
Report1	Mar 19 2015 9:46AM	melliott@example.com	6/16/2015 3:50:12 AM	1 KB
Report2	Mar 19 2015 9:51AM	melliott@example.com	1/16/2015 3:50:12 AM	1 KB
SB_Scenario	Apr 14 2015 7:50AM	melliott@example.com	4/11/2015 4:02:52 AM	2 KB
SB_Batch29	Jul 23 2015 9:48AM	melliott@example.com	4/11/2015 4:00:24 AM	2 KB
TestScenario_1395235325890.xml		melliott@example.com	3/20/2015 4:59:13 AM	2 KB
TestScenario_1395235218122.xml		melliott@example.com	3/20/2015 4:45:22 AM	1 KB
TestScenario_options_1391410971723.xml		melliott@example.com	3/20/2015 4:39:22 AM	2 KB
TestScenario_1391067950763.xml		melliott@example.com	3/20/2015 4:34:46 AM	1 KB
TestScenario_1390985038552.xml		melliott@example.com	3/20/2015 4:32:32 AM	1 KB
TestScenario_1389870254853del1234445555666.xml		melliott@example.com	3/20/2015 4:29:31 AM	1 KB
TestScenario_1389869408716del12345667788899.xml		melliott@example.com	3/19/2015 7:28:54 AM	1 KB
TestScenario29_1377251915749.xml		melliott@example.com	3/19/2015 1:34:48 AM	3 KB
SB_Batch29_1377251507438.xml		melliott@example.com		
SB_Batch29_1377251177147.xml		melliott@example.com		
SB_Batch29_1377249808316.xml		melliott@example.com		
SB_Batch29_1377249224282.xml		melliott@example.com		
SB_Batch29_1377061381160.xml		melliott@example.com		
SB_Batch29_1377061151460.xml		melliott@example.com		
SB_Batch29_1377060177040.xml		melliott@example.com		
SB_Batch29_1377058783070.xml		melliott@example.com		
TestScenario_1372835627476.xml		melliott@example.com		

Figure 51 Impact Analysis Scenario Report Listing

A right click option to Rename the report is available. Select a report, right click and a separate screen is displayed. Enter in the new name and save.

NEW SCENARIO

The **New Scenario** tab can be accessed only from the Reporting sub-tab. On the Reporting sub-tab, click **New Scenario**. This opens a **New Scenario** tab.

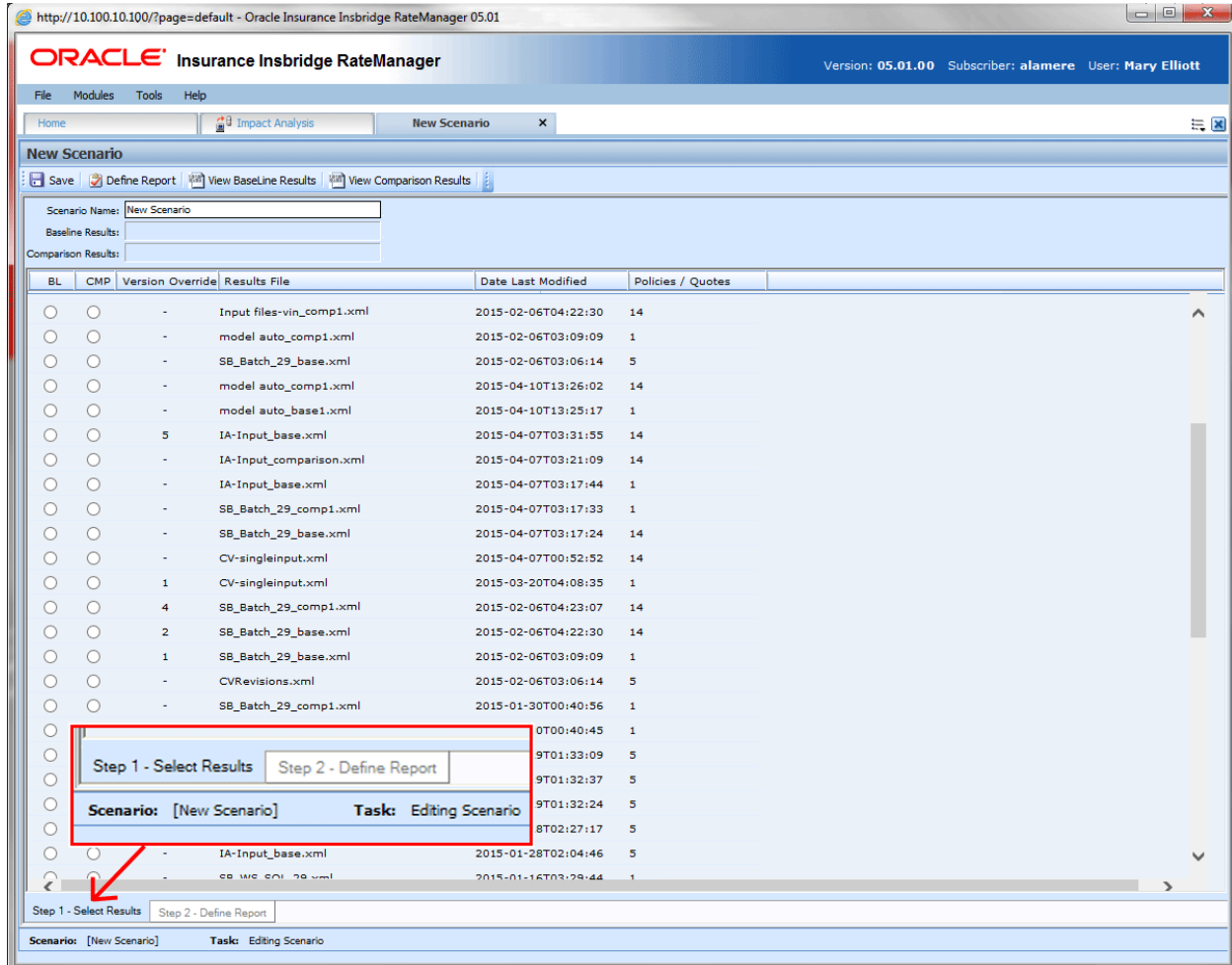


Figure 52 Creating a New Scenario

The New Scenario tab also has two sub-tabs:

- **Step 1: Select Results:** This tab is where you select the result files to be compared.
- **Step 2: Define Reports:** This tab is where you enter any filters and flags on the report.

STEP 1: SELECT RESULTS

The first step in creating a new scenario is to name the scenario and select the result files to be compared. This is done on Step 1– Select Results.

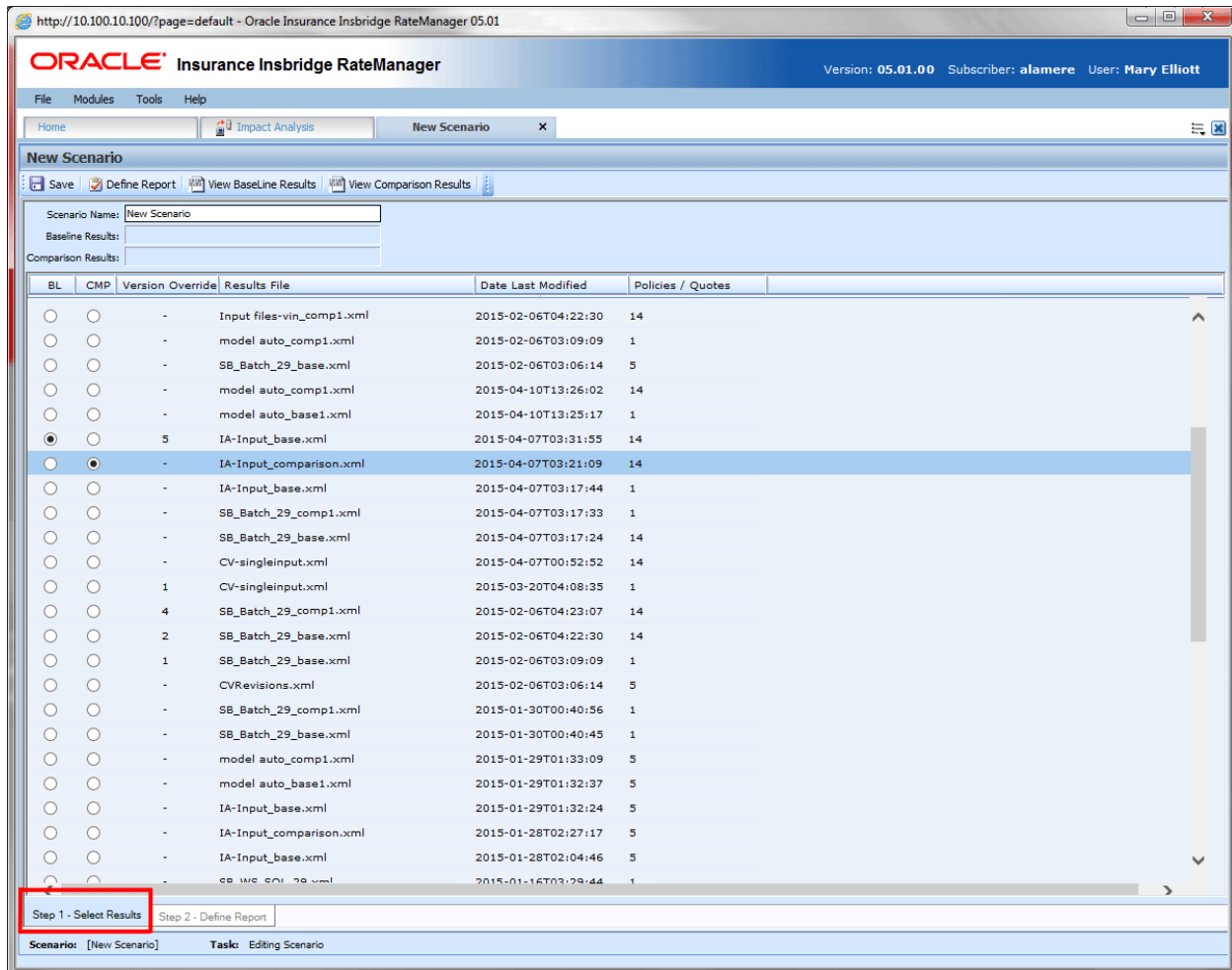

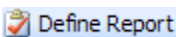




Figure 53 Step 1: Select Results

FUNCTIONALITY


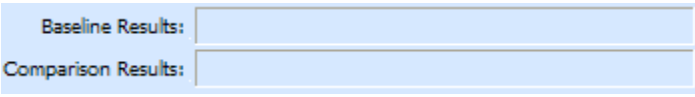
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

 Save	Save: Saves changes to the current scenario. If you choose a different baseline or comparison file, the scenario should be saved before defining the report.
 Define Report	Define Report: Opens Step 2: Define Reports, where you can choose results to filter on and which results to display. If you choose a different baseline or comparison file, the scenario should be saved before defining the report.

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

Definition Options:

The only definition option is the Send Report Response to field. This is a required option.

	Scenario Name: Enter a name for the scenario. This is a required field.
	Baseline Results: The result file that contains the original results. This field is not directly editable. It will be updated when a new baseline file is chosen from the results file listing. Comparison Results: The result file that will be compared to the baseline file. This field is not directly editable. It will be updated when a new comparison file is chosen from the results file listing.

FIELDS

Results File Listing

The Result File Listing has all the result files from Impact Analysis→Batch Files. If the file you need is not listed, please return to Impact Analysis→Batch File tab and verify the file is listed.

BL (BaseLine): This column allows the user to choose the baseline file. Select the file you want to be the baseline file. Only one baseline file can be chosen.

CMP (Comparison): This column allows you to choose the comparison file. Select the file you want to be the comparison file. Only one comparison file can be chosen.

Version Override: Displays the version override that was used. A hyphen in the column indicates that no version override was used.

Results File: Name of the results file.

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

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

Right Click Options

There are no right click menu options for Step 1: Select Results.

File Names

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

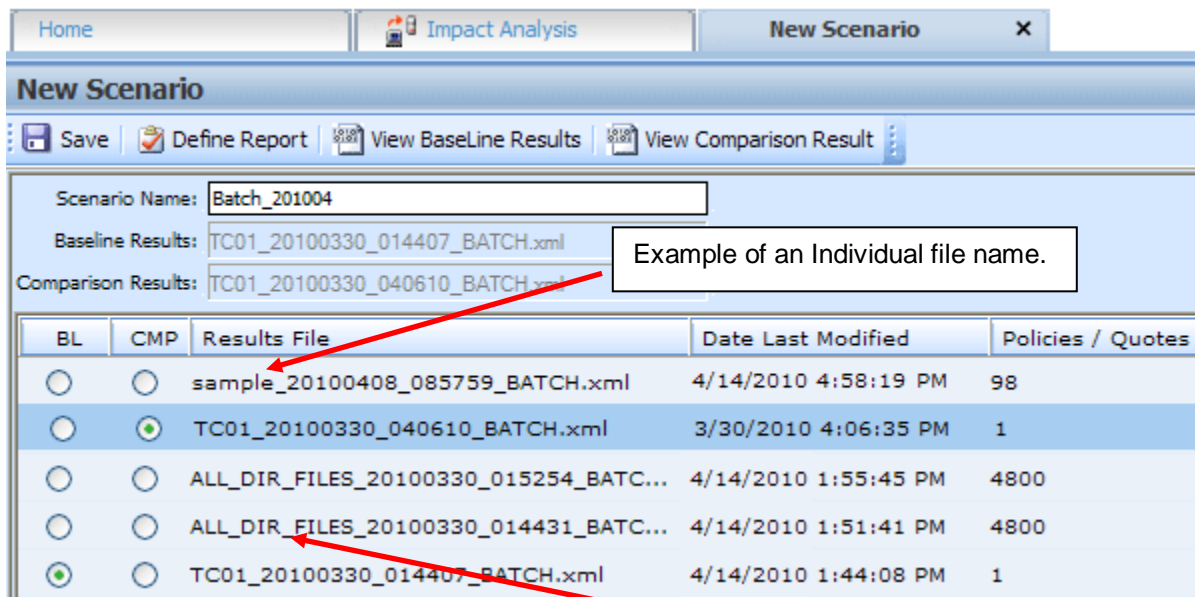


Figure 54 File Name Example

STEP 2: DEFINE REPORT

The second step in creating a new scenario is choosing the results to filter on and the results to show on the report. This is done via step 2: Define Report. Step 2 is where you can choose which results to filter on and which results to display. If you choose a different baseline or comparison file, the scenario should be saved before defining the report.

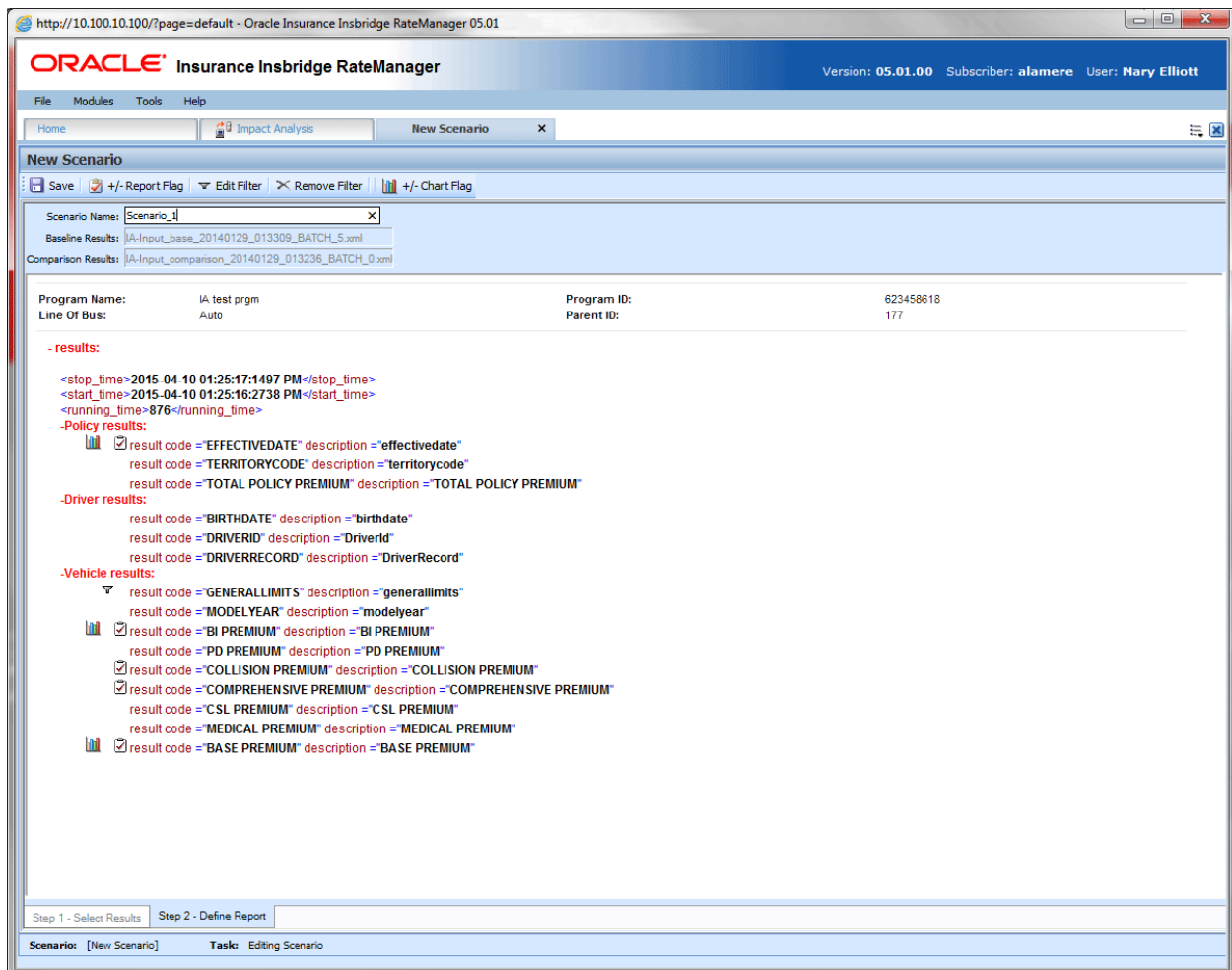







Figure 55 Step 2: Define Report

FUNCTIONALITY


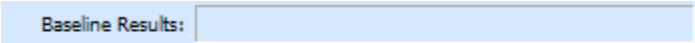
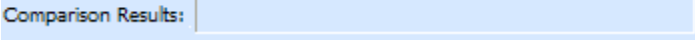
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this tab as well as the definition options you can add.

Functions:

 Save	Save: Saves changes to the current scenario. If you choose a different baseline or comparison file, the scenario should be saved before defining the report.
 +/- Report Flag	+/- Report Flag: Adds or removes the report flag from the selected result. A report flag also can be added or removed by double-clicking a result. For more information, see Report Flags .
 Edit Filter	Edit Filter: Opens the edit filter popup that allows you to specify how the result is filtered. For more information, see Report Filters .
 Remove Filter	Remove Filter: Removes all filters from the selected result.
 +/- Chart Flag	Chart Flag: Adds the selected flagged item to the report chart.

Definition Options:

The only definition option is the Send Report Response to field. This is a required option.

	<p>Scenario Name: Enter a name for the scenario.</p> <p>This is a required field.</p>
 	<p>Baseline Results: The result file that contains the original results. This field is not directly editable. It will be updated when a new baseline file is chosen from the results file listing.</p> <p>Comparison Results: The result file that will be compared to the baseline file. This field is not directly editable. It will be updated when a new comparison file is chosen from the results file listing.</p>

FIELDS

Program information is at the top of the report. This is basic program identification information. Results are listed next. If Stop, start and run time information may be listed. This is an option that is set by the system administrator in Insbridge Framework Administrator (IBFA) or Insbridge SoftRater Server (IBSS). If you would like run time information, please contact your system administrator to set this option to ON.

Program Information




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

Project ID: Product the programs are for.

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

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

Results

- Shows a listing of the results the baseline and comparison files have in common, arranged by category. A  indicates that the report flag has been set, and the result will be shown in the report. A  indicates that a filter has been set for the result. A  indicates that a chart flag has been set and the result will be displayed in a chart.
- Start and stop times can be listed at the top of the result if needed. Start and stop times are set in the Insbridge SoftRater Server (IBSS) on the Edit Options page. Allowing for start and stop times to be displayed will return start and stop times on all XML documents that IBSS processes. An administrator may have to make the changes.

Right Click Options:

Every result entry has right click menu options. To view the right click menu options, select the entry you want and right click.

Program Name:	IA test prgm	Program ID:
Line Of Bus:	Auto	Parent ID:

- results:

```

<stop_time>2014-04-07 03:09:09:0857 AM</stop_time>
<start_time>2014-04-07 03:09:08:7947 AM</start_time>
<running_time>292</running_time>
-Policy results:
  result code ="EFFECTIVEDATE" description ="effectivedate"
  result code ="TERRITORYCODE" description ="territorycode"
  result code ="TOTAL POLICY PREMIUM" description ="TOTAL POLICY PREM
-Driver results:
  result code ="BIRTHDATE" description ="birthdate"
  result code ="DRIVERID" description ="DriverId"
  
```

Add/Remove Report Flag
 Add/Remove Chart Flag
 Edit Filter
 Remove Filter

Figure 56 Right Click menu for Step 2: Define Report

Step 2: Define Report has four choices:

- Add/Remove Report Flag:** Adds or removes the report flag from the selected result. A report flag also can be added or removed by double-clicking a result.
- Add/Remove Chart Flag:** Adds or removes the chart flag from the selected flagged result. A chart flag also can be added or removed by double-clicking the Chart Flag button in the menu. Chart flags can only be added to flagged line items.
- Edit Filter:** Opens the edit filter popup that allows you to specify how the result is filtered.
- Remove Filter:** Removes all filters from the selected result.

Setting Flags

In order for a result to show on an Impact Analysis report, it must have a flag. If a result appears multiple times for the same policy, all instances of the result are shown in the **Filtered Policy Details** section.

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

For example, if a report flag has been added to the Policy result TOTAL_POLICY_SDIP. For each vehicle on the policy, a TOTAL_POLICY_SDIP is shown. For more information on how results are displayed, see Viewing a Scenario Report.

Flags can be set only on the Step 2: Define Report sub-tab. Flags can be added or removed at any time. If you add or remove a flag to a scenario that has already been run, you will need to run the scenario again.

To Flag or Un-flag a Result

1. Navigate to **Step 2 - Define Report** on the report where you want to add or remove a flag.

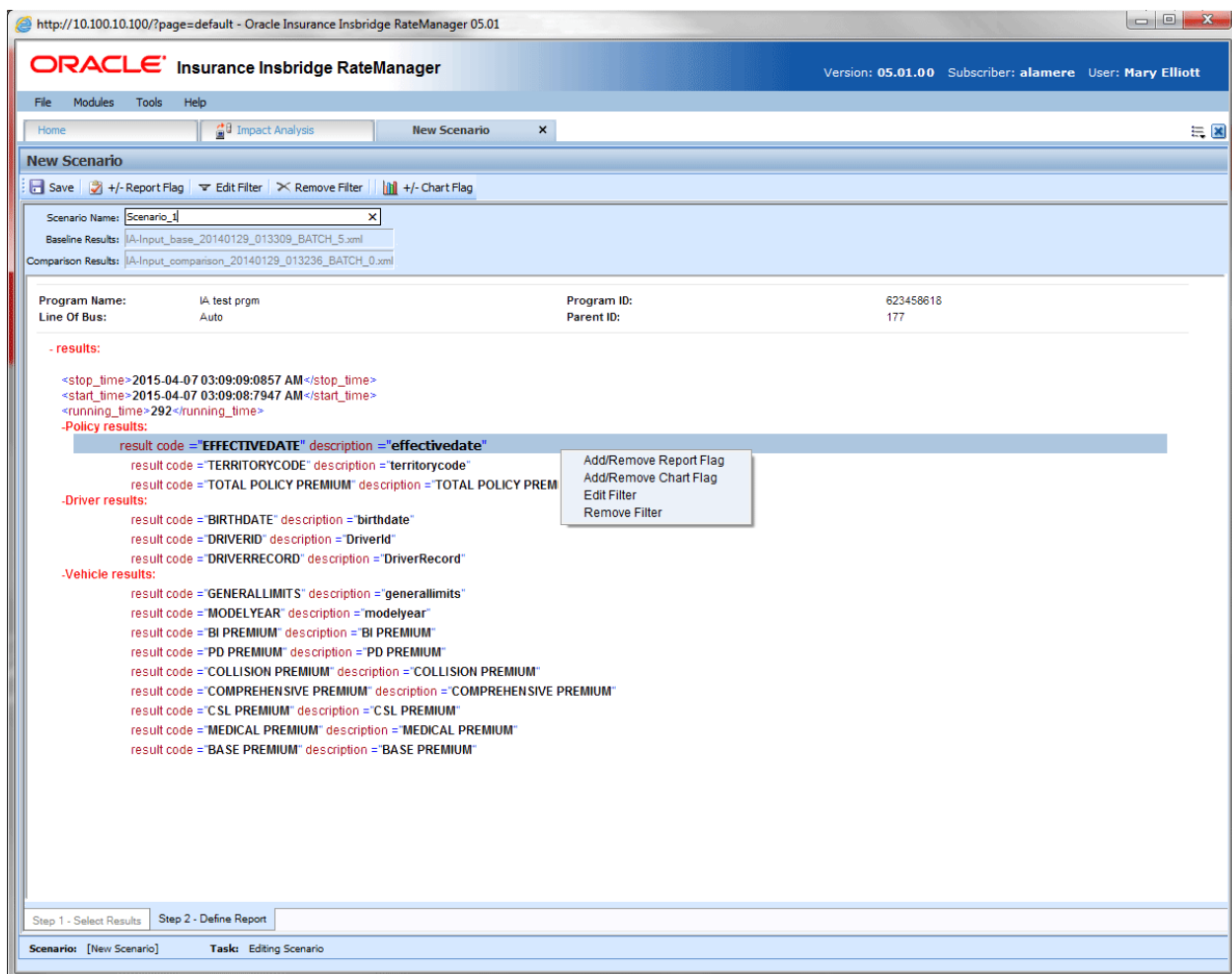


Figure 57 Flagging or Un-Flagging a Result


2. Select the result you wish to flag or un-flag and then click **+/- Report Flag**. A flag also can be added or removed by double-clicking the result or by right clicking it and selecting **Add/Remove Report Flag** from the menu.
3. If you added a flag, a check icon () is shown next to the result. If you removed a flag, the check icon is removed.

Chart Flags

In order for a result to show as a chart value on an Impact Analysis report, it must be flagged with a chart flag. A chart flag can be placed on any flagged result. You must set the report flag first and then set the chart flag. This allows for the result to be displayed in a chart on the report. You can select as many chart flags as you need. Adding a Chart Flag follows the same procedure as adding a Report Flag.

1. Select the flagged result you want displayed in a chart and then click **+/- Chart Flag** or by right clicking it and selecting **Add/Remove Chart Flag** from the menu. A chart flag also can be removed by double-clicking the result. This removes the Report Flag as well.
2. If you added a chart flag, a chart icon () is shown next to the result. If you removed a flag, the chart icon is removed.

Report Filters

A filter is used when you wish to view details on all policies that meet certain criteria. For example, if you only wanted to see those policies whose BI_Premium increased by more than \$100, you would set a filter on the BI_Premium. Filters can be set for multiple results and/or multiple filters can be set for a single result.

Filters can be set only on the Step 2: Define Report sub-tab. Filters can be added or removed at any time. If you add or remove a filter to a scenario that has already been run, you will need to run the scenario again. There is no limit to the number of filters that can be set.

Use of the Filtering option:

- The filter option creates a sub-set of policies that meet the criteria specified in the filter(s).
- If the filter is placed on a sub-category result, any single instance of that category result that tests true will include the policy in the filtered set.
- When filtering on a sub-category, since the filter only controls conditional inclusion of the policy in the filtered set, report and policy detail totals will include both filtered/unfiltered sub-category amounts.
- A policy will be included in the filtered set if all of the filters test true.

Note that Flagging an item causes ALL instances of that item (non-conditional) in a policy to be reported on and totaled for both the filtered set and the non-filtered set (all policies).

There are four types of filters:

- **Where the diff is:** This option takes the difference of the result in the baseline file and the result in the comparison file. It then compares the difference against the value entered, using the chosen operator. Since subtraction is only defined for numbers, this filter does not make sense for strings or dates.
- **Where the value is:** This option compares the value entered against the value in the file.
- **Where base value is:** This option compares the value entered against the baseline value. This filter looks for matches against the baseline value. Percentages are not allowed.
- **Where comp value is:** This option compares the value entered against the comparison value. This filter looks for matches against the comparison value. Percentages are not allowed.

To Add/Edit a Filter

1. Navigate to **Step 2 - Define Report** on the report where you want to add or remove a filter.
2. Select the result you wish to add or edit a filter for and then click **EDIT FILTER**. You can also add or edit a filter by right clicking the result and selecting **Edit Filter** from the popup menu.
3. This will open the **Filter Options** window where you can set the options for the filter.

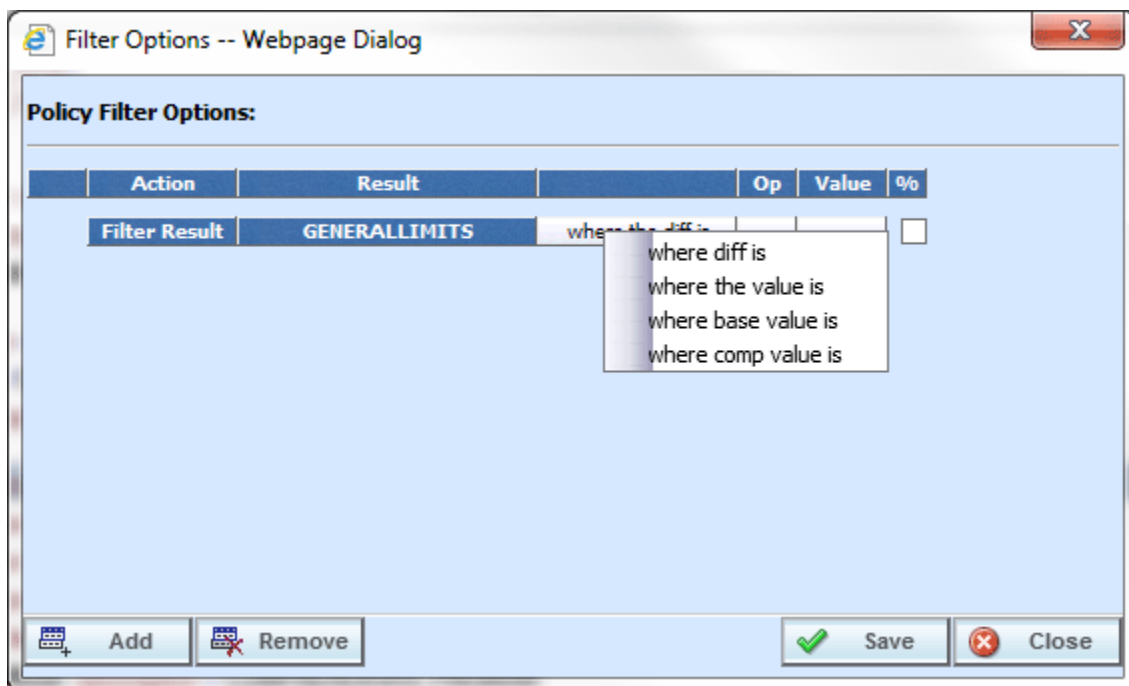


Figure 58 Policy Filter Options

4. The action and result fields are determined by the result you selected. If you want to change these fields, close this window and select the correct result.
5. The filter type default is "where the diff is". If you would like another filter type, click "where the diff is" and select the type of filter you want to use. Only one filter type can be selected per line. On

each result, you can enter as many filters as you need.

6. Select the operator to be used by clicking the -- cell in the **Op** column.

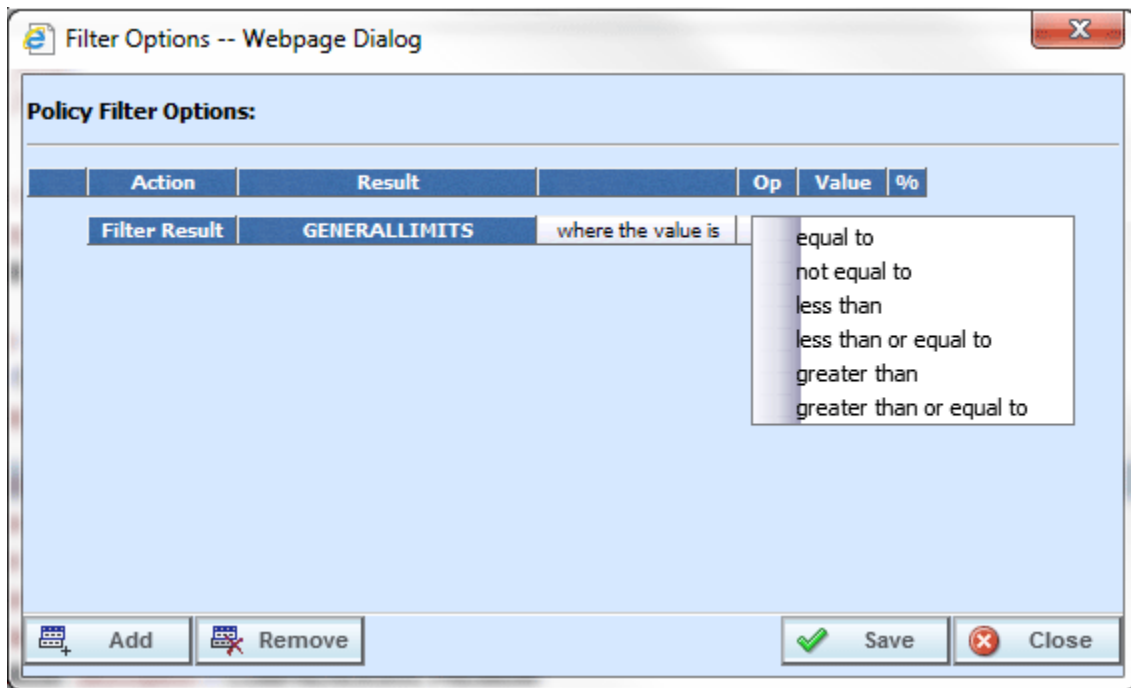


Figure 59 Filter Options Selecting an Operator

NOTE: It is recommended that comparisons such as *greater than* and *less than* be used only for numerical values. For string and date values, it is recommended that only *equals* and *not equals* be used.

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

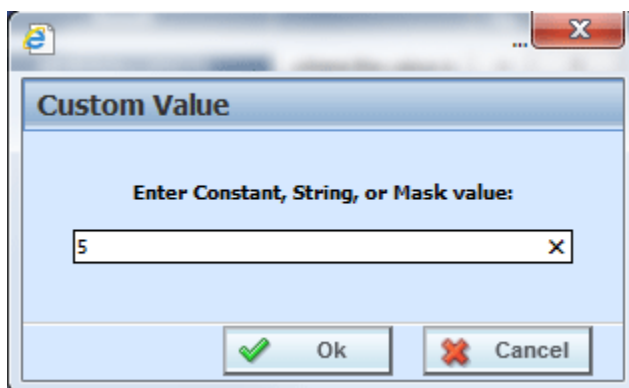


Figure 60 Entering a Constant Value


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

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

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

10. To remove one of the filters, check the line of the filter you want to delete and click **Remove Filter**.

The first filter listed cannot be removed from this window. To remove the entire filter, exit the Filter Options popup. Select the result where you want to remove the filter and click **Remove Filter** from the toolbar. This will remove the filter from the result.

11. When you are finished making changes, click **Save** to close the Filter Options window and refresh the Step 2: Define Report tab. A funnel icon () will be next to the result where you added a filter.

12. If you are finished defining your report, click **Save**.

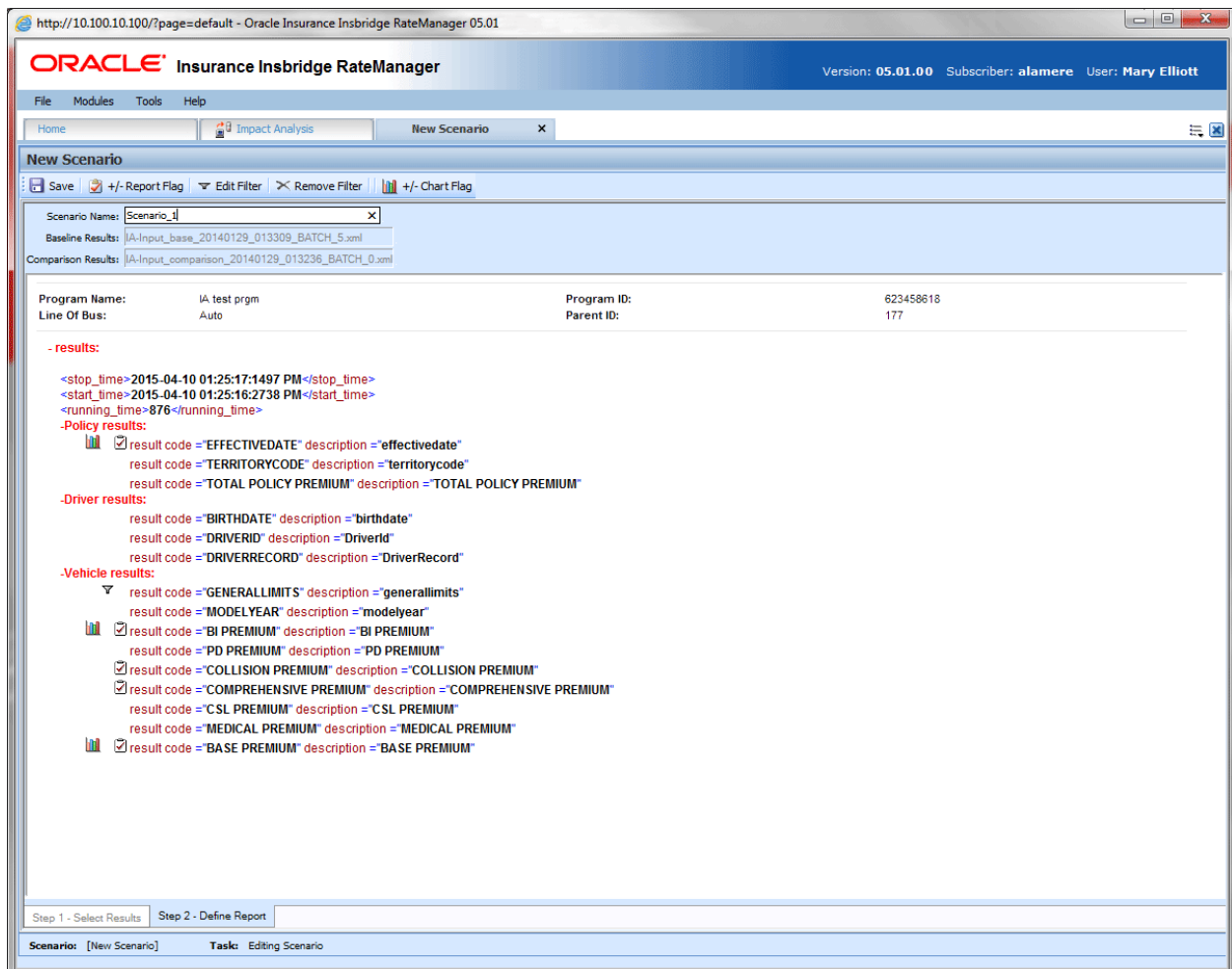


Figure 61 Step 2: Define Report with Flags and Filters

CREATING A NEW SCENARIO REPORT

Once you have finished creating your scenario, you can run it to produce an Impact Analysis report. The report shows data based upon the report flags and filters you defined.

Before creating a new scenario, batch result files should be available. If batch result files are not listed, you must create them. For more information, see *Preparing a Batch Input File*.

1. The **New Scenario** tab can be accessed only from the Reporting sub-tab. On the Reporting sub-tab, click **New Scenario**. This opens a **New Scenario** tab.
2. On the **Step 1: Select Results** sub-tab, enter a **Scenario Name** and select the **Baseline and Comparison** files you want.
3. If needed, you can further define the report. Enter the **Step 2: Define Report** sub-tab. Set any filters or flags.
4. **Save** your report.
5. Return to the **Reporting** sub-tab on the Impact Analysis tab. Your report will be listed in the Scenario Listing area at the top. Select your report.
6. Enter a Send Report Response email address. If you have entered an admin email in IBFA, that email will be used.
7. Click **Run Scenario**. A message will be displayed that your request has been submitted for processing. If a different message is received, see *Batch Error Messages*.

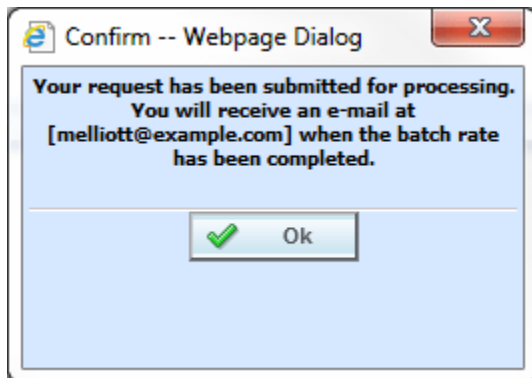


Figure 62 Confirmation Message for Running an Impact Analysis Scenario

8. When the report is ready, an email will be sent to the address entered. Return to Impact Analysis→ Reporting sub-tab. Your report will be listed in the Scenario Report Listing in the lower part of the sub-tab. Double-click the report to view it. If the report is not shown, click **REFRESH**. For more information, see *Viewing a Scenario Report*.

Batch Error Messages

If you rate a batch file and receive the following message, it means that an administrator needs to start the Insbridge Message Service in Insbridge Framework Administrator (IBFA). Once the service is started, the request will be submitted and processed.

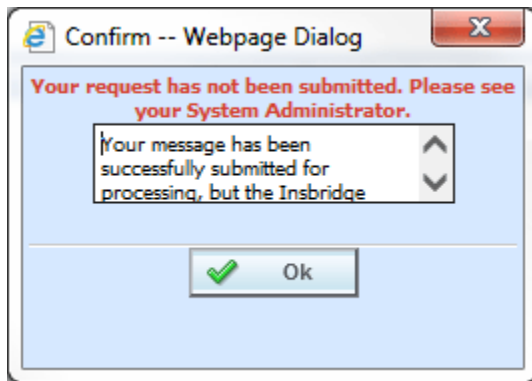


Figure 63 Error Message for Batch Rate

If there was a problem when rating your batch file, the email you receive will list the problem. For example, the file could not be found or sequencing was missing.

If you do not receive an email regarding your batch file, there may be a problem with Insbridge Framework Administrator (IBFA) relaying messages. Please contact your system administrator to verify that emails are being relayed.

EDITING A SCENARIO REPORT

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

To Edit a Scenario

1. The **Edit Scenario** tab can be accessed only from the Reporting sub-tab. On the Reporting sub-tab, in the Scenario Listing area, double click the report you want to edit. This opens an **Edit Scenario** tab.
2. Make any change on the **Step 1: Select Results** sub-tab. You can edit the **Scenario Name** and change the **Baseline and Comparison** files you want to use.
3. If needed, you can edit and flags or filters. Enter the **Step 2: Define Report** sub-tab. Edit any filters or flags.
4. **Save** your report.
5. Return to the **Reporting** sub-tab on the Impact Analysis tab. Your report will be listed in the Scenario Listing area at the top. Your report is ready to be run again.

RENAMING A SCENARIO REPORT

A scenario report can be re-named after it has been run.

Renaming a Scenario Report

1. Navigate to the **Reporting** sub-tab. Select the scenario report you want to rename and right click.
2. Select Rename. The Rename screen is displayed.

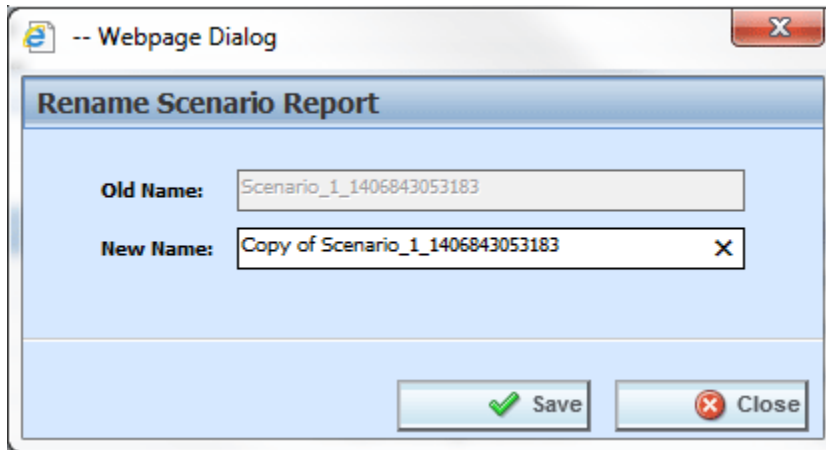


Figure 64 Renaming a Scenario Report

3. Enter in the **New Name** and click **Save**. You are returned to the Scenario tab and your report will show the new name. Click Close to return to the Reporting sub-tab without changing the report.

DELETING A SCENARIO OR SCENARIO REPORT

If a scenario report is no longer needed, it can be deleted.

To Delete a Scenario Report

1. Navigate to the **Reporting** sub-tab. Select the scenario report you wish to delete and click **Delete**.
2. For reports in the scenario listing at the top of the tab, you will **NOT** receive a warning message. Your report is removed immediately. For scenario reports in the scenario reports listing in the lower part of the tab, you will be asked to confirm deletion.

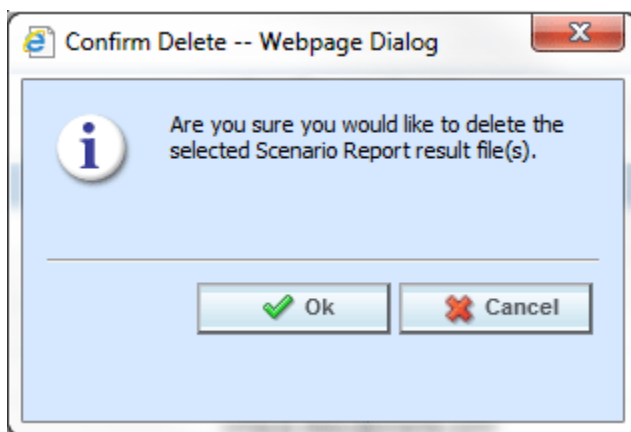


Figure 65 Delete Report Message

3. Click **OK** to delete the scenario report file. Click **Cancel** to return to the Reporting sub-tab without deleting the report.

REPORTS

Impact Analysis has a variety of reports:

- **View XML:** Located on the right click menu in the XML Input File Listing of Batch Files sub-tab. Also found on the right click menu of the Result XML File Listing. This report allows you to review the input XML being used and make sure this is the file you want to utilize. The selected XML file is displayed in a separate window. Multiple files cannot be viewed.
- **View Output:** Located on the right click menu in the XML Result File Listing of Batch Files sub-tab. This report allows you to review the result file content to verify that this is the file you want to utilize. The selected XML file is displayed in report format in a separate tab.
- **View BaseLine Results:** This report can be viewed on the Step 1: Select Results sub-tab. View BaseLine Results allows you to view the Batch Rating Summary report of the selected baseline file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. The information is displayed in a separate window.
- **View Comparison Results:** This report can be viewed on the Step 1: Select Results sub-tab. View Comparison Results allows you to view the Batch Rating Summary report of the selected comparison file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. The information is displayed in a separate window.
- **Scenario Report:** This report can be viewed on the Reporting. This report shows the differences between two selected result files, allowing you to compare the effects of a program change against existing rates. The report is displayed in a separate window.

Viewing a View XML Report

Select the **Input XML** you want to view and right click. Select **View XML** from the menu. Your report will be displayed in a separate screen. Multiple files cannot be viewed. The View XML report for the Result XML can be selected from the View Output Report.

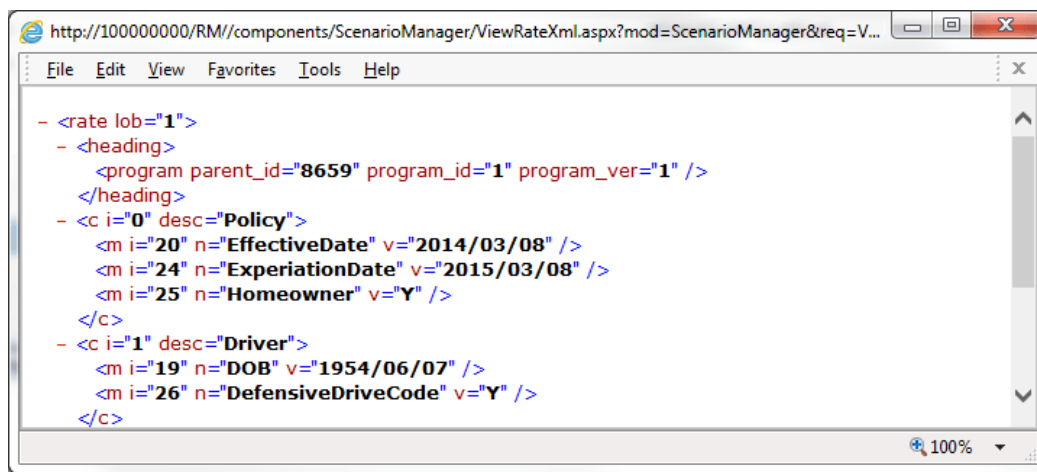


Figure 66 View XML Report

Viewing a View Output Report

Select the **Result XML** you want to view and right click. Select the **View Output** report from the right click menu. Your report is displayed in a separate tab.

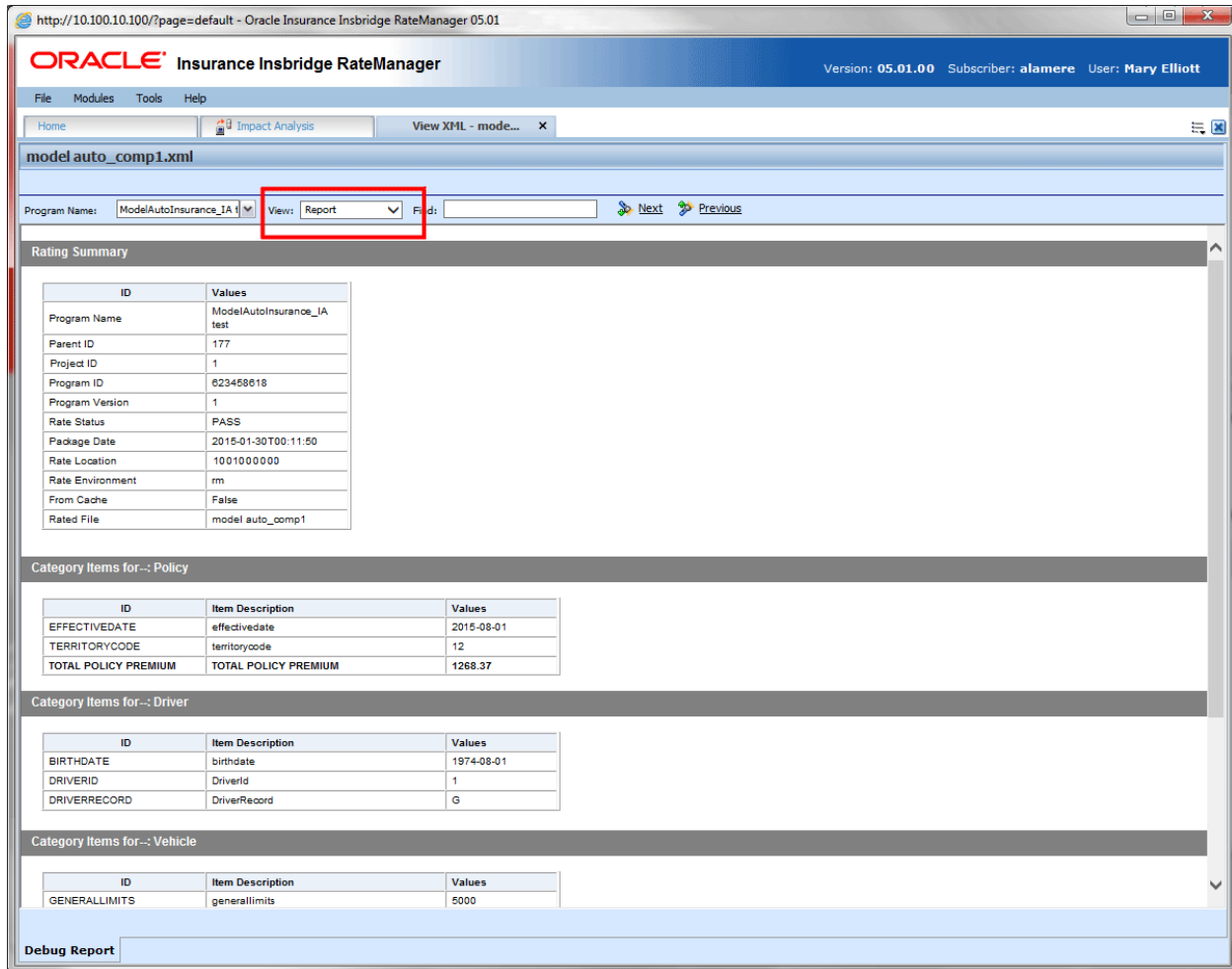


Figure 67 View Output Report

The top bar contains the file name.

Navigation Bar

Program Name: Displays the name of the program being rated. The drop down menu is available when you are rating multiple programs or when using Program to Program.

View: The report view is the default view. You may change this view to show the raw XML output.

Find: Allows you to search through the report for a specific alpha/numeric character string.

Next: If a search is performed, Next navigates to the next place in the report that a match was found.

Previous: If a search is performed, Find Previous navigates to the previous place in the report that a match was found.

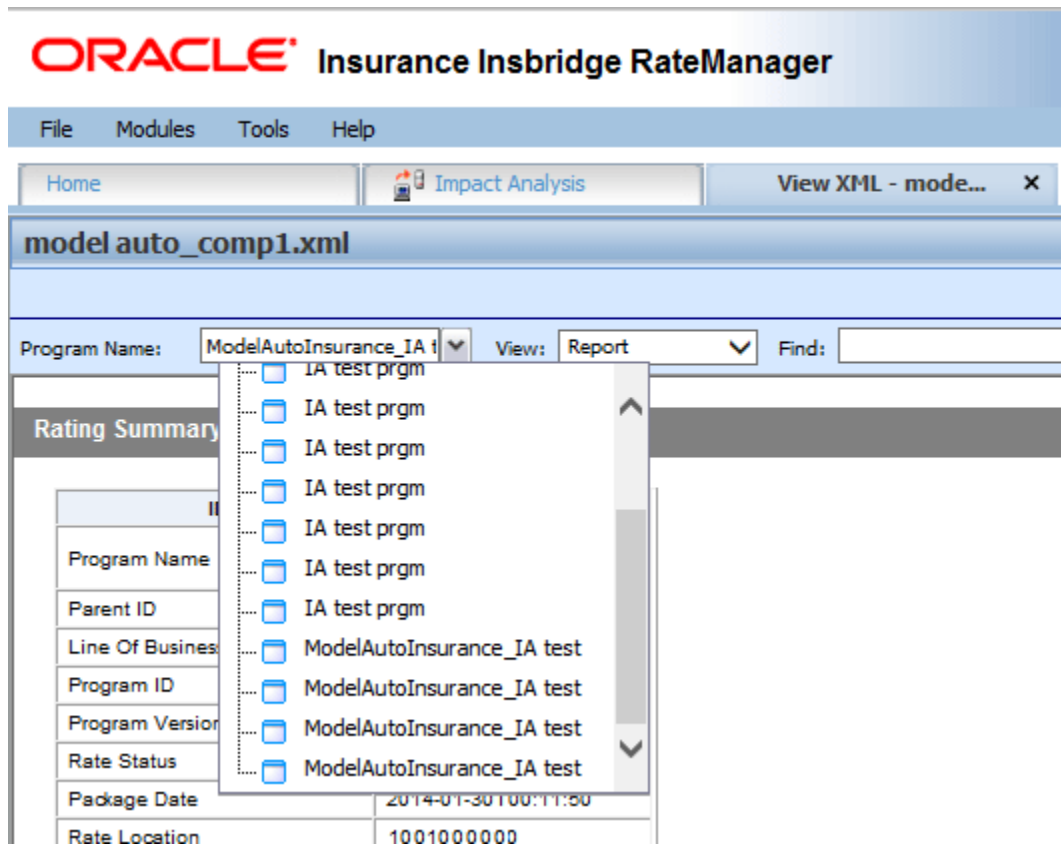


Figure 68 Output XML with Multiple Files

Click the drop down to see if multiple files are available. You can select to view another file.



VIEWING BASELINE AND COMPARISON FILES

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

However, if the situation were reversed, and the baseline file had a value of 1250 and the comparison file had a value of 1000, Policy 1 would not meet the filter because the difference would be -250 and Policy 1 would not be shown in the **Filtered Policy Details** section.

To cover both positive and negative differences, you would need to set up two filters; one for when “where the diff is > 200” and one for when “where the diff is < -200.” This would allow both situations to be shown in the **Filtered Policy Details**.

The BaseLine and Comparison results can be viewed on the Step 1: Select Results sub-tab.

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

To View a BaseLine or a Comparison File

1. On Impact Analysis→Reporting sub-tab, select the scenario report where you want to view the BaseLine or Comparison files. This will open **Step 1: Select Results**. You also can view these files when you are creating a New Scenario.
2. If you are creating a new scenario, select the file you need. Otherwise, click **VIEW BASELINE RESULTS** or **VIEW COMPARISON RESULTS** to view the appropriate file. A separate screen will be displayed.

Batch Results Listing -

File Edit View Favorites Tools Help

Batch Rating Summary

Program Name: 1) IA test prgm **Program ID:** 3
Program Version: 1 **Rate Status:** PASS
Line Of Bus: 1 **Parent ID:** 177
Rate Location: 100000000 **Rate Environment:** RM
Package Date: 2014-01-29T01:10:36 **From Cache:** False
File Rated: IA-Input_base
Result File: ALL_DIR_FILES_20140407_031723_BATCH_0.xml

Search for: Find Print Close

☐ Up ☒ Down

Category Items for:- Policy

ID	Item Description	Values
TOTAL_POLICY_PREMIUM_NO_SDIP	Total Policy Premium without SDIP	1744.00
TOTAL_POLICY_SDIP	Total Policy SDIP Credit-Surcharge	-212.00
TOTAL_POLICY_PREMIUM_SDIP	Total Policy Premium with SDIP	1532.00
PIP_DEDUCTIBLE	PIPDeductible	NONE

Category Items for:- Driver-Vehicle

ID	Item Description	Item 1 - Values	Item 2 - Values
BI_PREMIUM	BI Premium	143.00	143.00
PIP_PREMIUM	PIP Premium	47.00	62.00
UMBI_PREMIUM	UMBI Premium	14.00	18.00
PD_PREMIUM	PD Premium	199.00	199.00
OPTIONAL_BI_PREMIUM	Optional BI Premium	105.00	105.00
MP_PREMIUM	MP Premium	12.00	16.00
COLL_PREMIUM	Coll Premium	168.00	283.00
LIMITED_COLL_PREMIUM	Limited Coll Premium	-	-
COMP_PREMIUM	Comp Premium	68.00	162.00
SUBSTITUTE_TRANSPORTATION_PREMIUM	Substitute Transportation Premium	-	-

100%

Figure 69 Viewing Baseline or Comparison Files

Program Information

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

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

Line of Bus: Which product the program is for.

Rate Location: Displays where the rate information is located.

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

File Rated: Name of the file rated.

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

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

Rate Status: The results of the rating request.

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

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

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

Search

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

Print

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

Close Window

Closes the current Rating Summary report.

Results

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

- **ID:** The Result ID entered on the Edit Group Tab 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.

VIEWING A SCENARIO REPORT

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

To View a Scenario Report

1. Navigate to Impact Analysis→Reporting sub-tab. Scenario Reports are listed in the lower portion of the tab. If you do not see your report, click **Refresh** to refresh the tab.
2. Locate the report you wish to view in the listing and double-click it. The report opens in a separate window.

Scenario reports have two tabs at the top of the screen:

- **Summary:** Contains charts, if requested, and a summary of results.
- **Details:** Contains the details of the programs contained in the report. If more than one program has been used, you can select the program from a list.

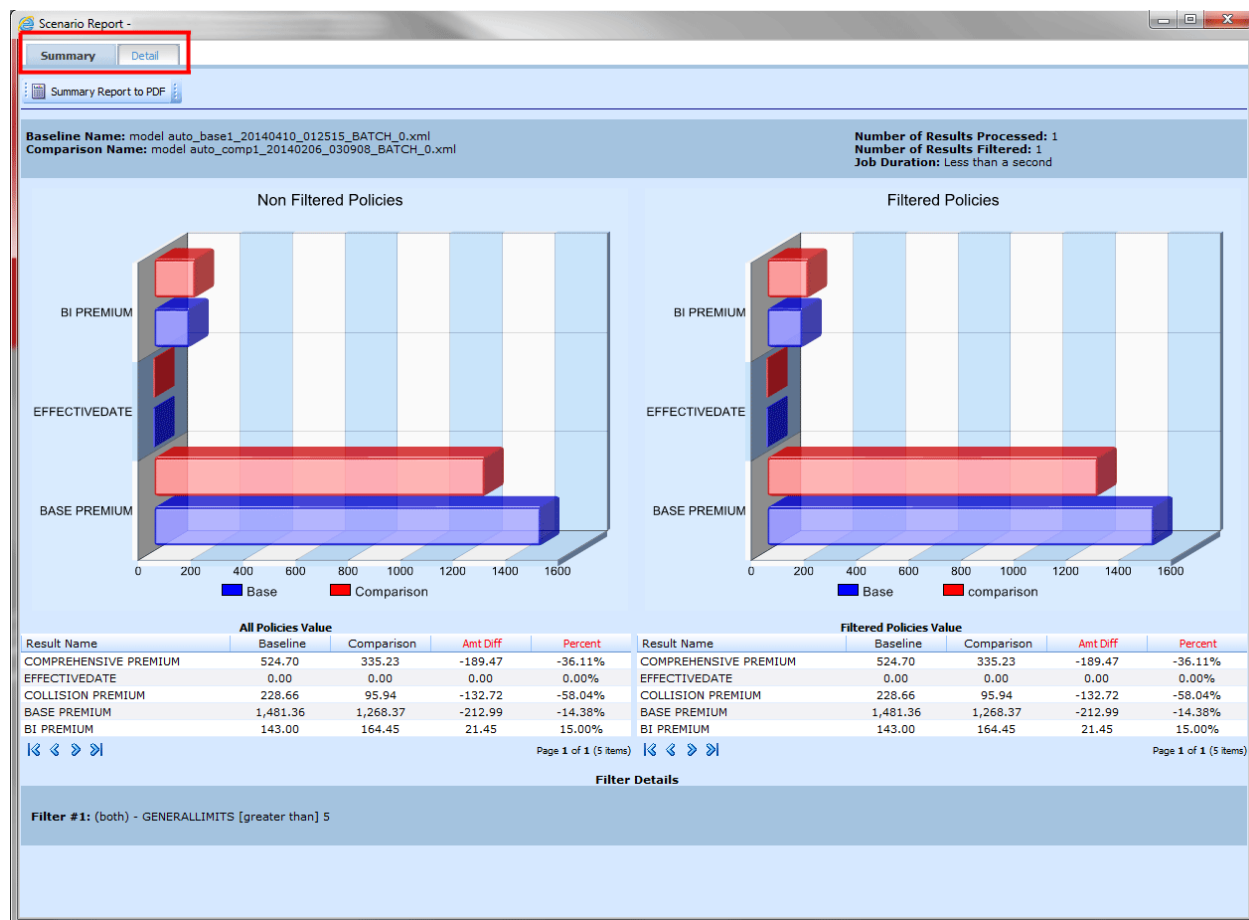


Figure 70 Impact Analysis Scenario Report with Chart

Scenario reports have one button:

 Selected Policy Report to PDF	Selected Policy Report to PDF: Prints a PDF report of the selected policy. If the button is grayed out, there are no policies to select.
--	---

Summary/Chart View

If you have placed chart flags on any results, a chart is displayed on the summary page. If no chart information has been requested, only a summary report is presented. If filters have been placed on the results, charts will be presented for non-filtered policies and for filtered policies.

Scenario summary information is located at the top of the report, above the chart if present. Statistics on the results is in the middle of the report, or below the chart. At the bottom is filter details.

Scenario Summary

The top portion of each report contains the basic information used to create the report.

Baseline Name: Name of the baseline file selected.

Comparison Name: Name of the comparison file selected.

Number of Results Processed: The total number of policies.

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

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

Statistics on Selected Result Elements

The middle area displays all results that have been flagged, as well as statistical information about the result.

All Policy Values

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

Filtered Policies Values

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

Filter Details

A listing of all filters used for the current report.

Detail Report

The Detail report tab contains the details for the policies used to create the report.

The screenshot displays the 'Scenario Report - Detail' window. It includes a 'Summary' tab and a 'Detail' tab. The 'Detail' tab shows a table of policy details for 'Policy Number: 100001' and 'Test File Name: model auto_base1'. The table is divided into 'Baseline' and 'Comparison' sections, with columns for 'Occ', 'Result Name', 'Result Value', and 'Difference'. The 'Difference' column is further divided into 'Amount' and 'Perc Diff'. The table shows five rows of data for various premium types: BASE PREMIUM, EFFECTIVEDATE, COLLISION PREMIUM, BI PREMIUM, and COMPREHENSIVE PREMIUM. The 'Filter Details' section at the bottom indicates 'Filter #1: (both) - GENERALLIMITS [greater than] 5'.

Baseline		Comparison		Difference			
Occ	Result Name	Result Value	Occ	Result Name	Result Value	Amount	Perc Diff
1	BASE PREMIUM	1,481.36	1	BASE PREMIUM	1,268.37	-212.99	-14.44
1	EFFECTIVEDATE	2014-08-01	1	EFFECTIVEDATE	2014-08-01	0.00	0.00
1	COLLISION PREMIUM	228.66	1	COLLISION PREMIUM	95.94	-132.72	-58.09
1	BI PREMIUM	143.00	1	BI PREMIUM	164.45	21.45	15.00
1	COMPREHENSIVE PREMIUM	524.70	1	COMPREHENSIVE PREMIUM	335.23	-189.47	-36.11

Filter #1: (both) - GENERALLIMITS [greater than] 5

Figure 71 Scenario Report Details

Filtered Policy Details

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

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

Baseline

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

Comparison

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

Difference

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

Selected Policy Report to PDF

The top of the report contains a Selected Policy Report to PDF button. This report provides details on the selected policy.

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

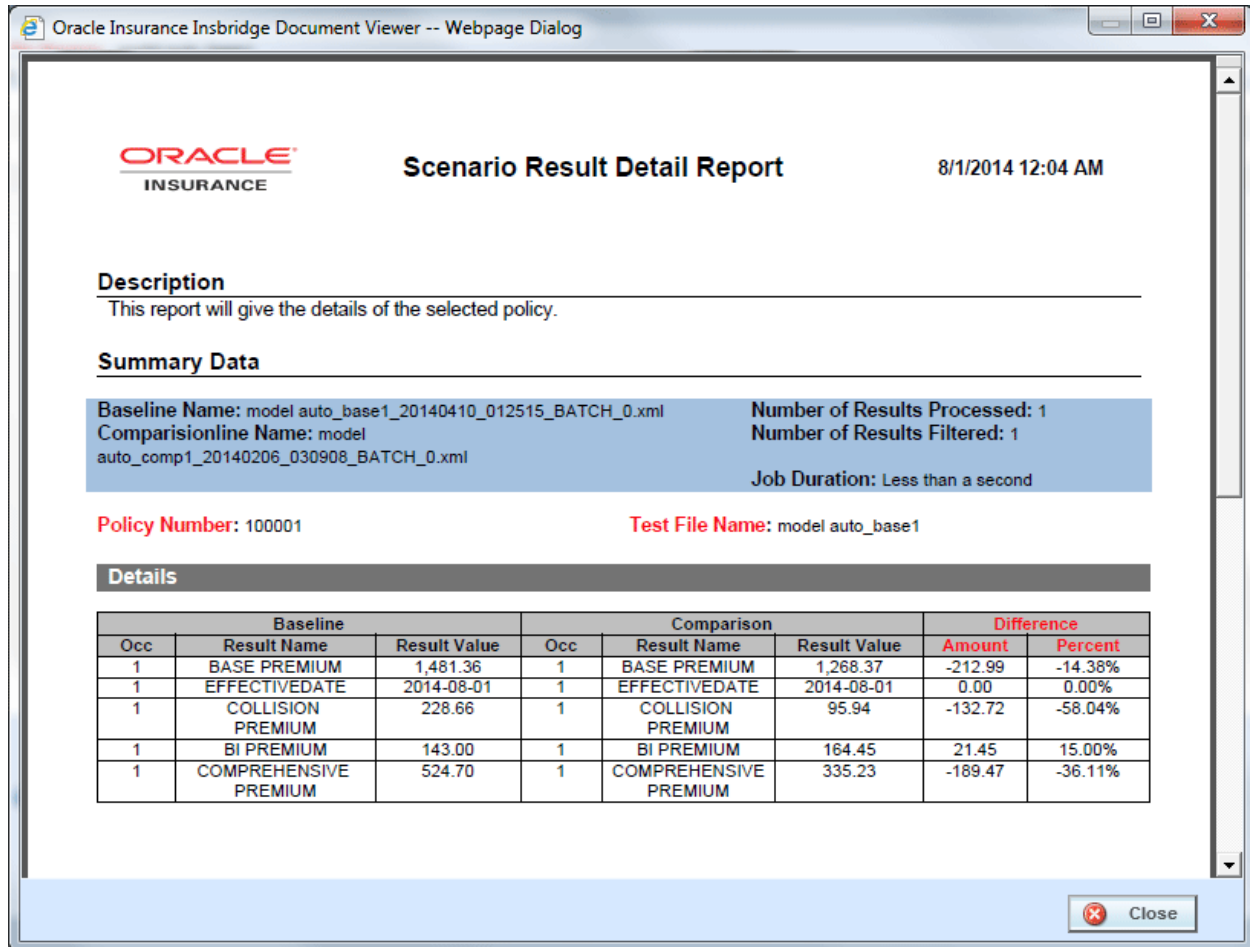


Figure 72 Policy to PDF Report

To View a PDF

1. On the Scenario Report, select the program that you want in PDF form.
2. Click the Selected Policy to PDF button.
3. The PDF opens in a separate window. You can Print or Save to your local machine or network if needed.

Viewing Options

There are buttons located on the lower portion of the window that allow you to view and download report files, and close the window when you place your cursor over the lower portion of the screen.

Exporting a Report

You can export reports on the Reporting sub-tab in MS Excel format. These reports are open for editing and can be stored to a local drive or share. The information contained in a exported report in the same as in the summary statistics section of the Scenario Summary report.

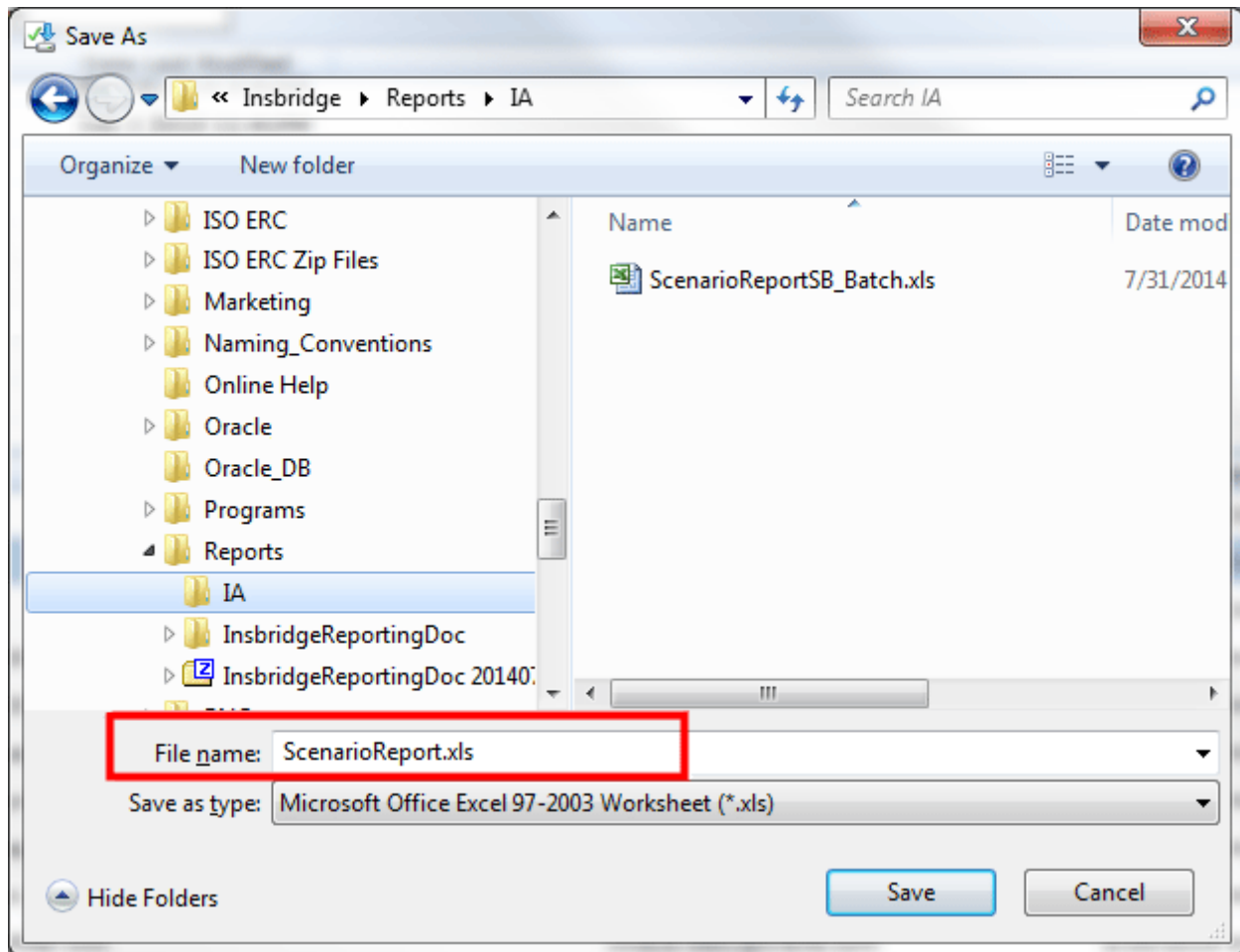


Figure 73 Exporting a Report

NOTE: When you do a “Save As” from the export, you should rename the file. By default, when you go to save, all export files are named “ScenarioReport”. It is recommended that you rename the file.

1. Navigate the Impact Analysis->Reporting sub-tab and select the report you want in MS Excel format.
2. Click the Export button in the menu.
3. Your computer's dialogue screen is displayed.
4. Enter in a new name and Save or Save As and select the drive or share where you want to save your report.

RELEASES

Releases is a package management area within RateManager. Releases allows you to package programs in batches and also deploy and load packages directly to IBFA in batch.

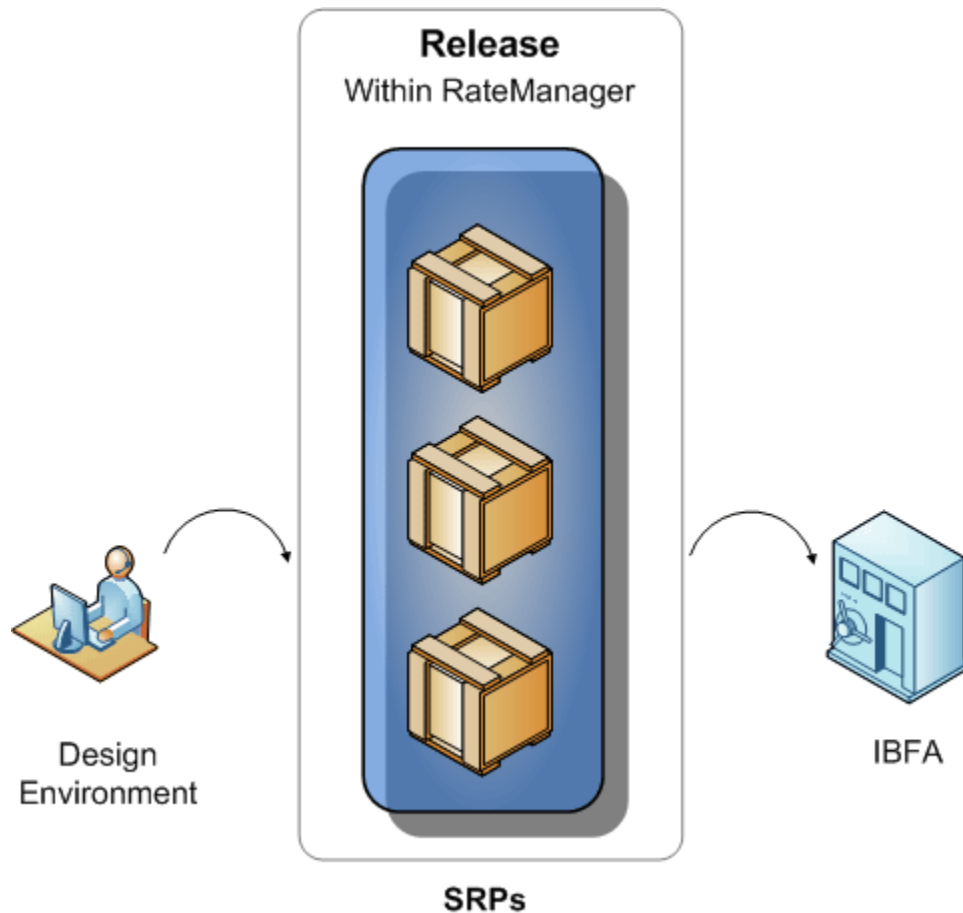


Figure 74 Release Process

Releases contains two *sub-tabs*:

- **Releases:** A Releases component that allows for groups of rating packages to be automatically deployed and loaded to IBFA. With the appropriate rights, you will have the ability to deploy rates directly to SoftRater without manually loading the packages through IBFA.
- **Packaging:** A batch-packaging tool that gives you the ability to create multiple packages simultaneously and asynchronously.

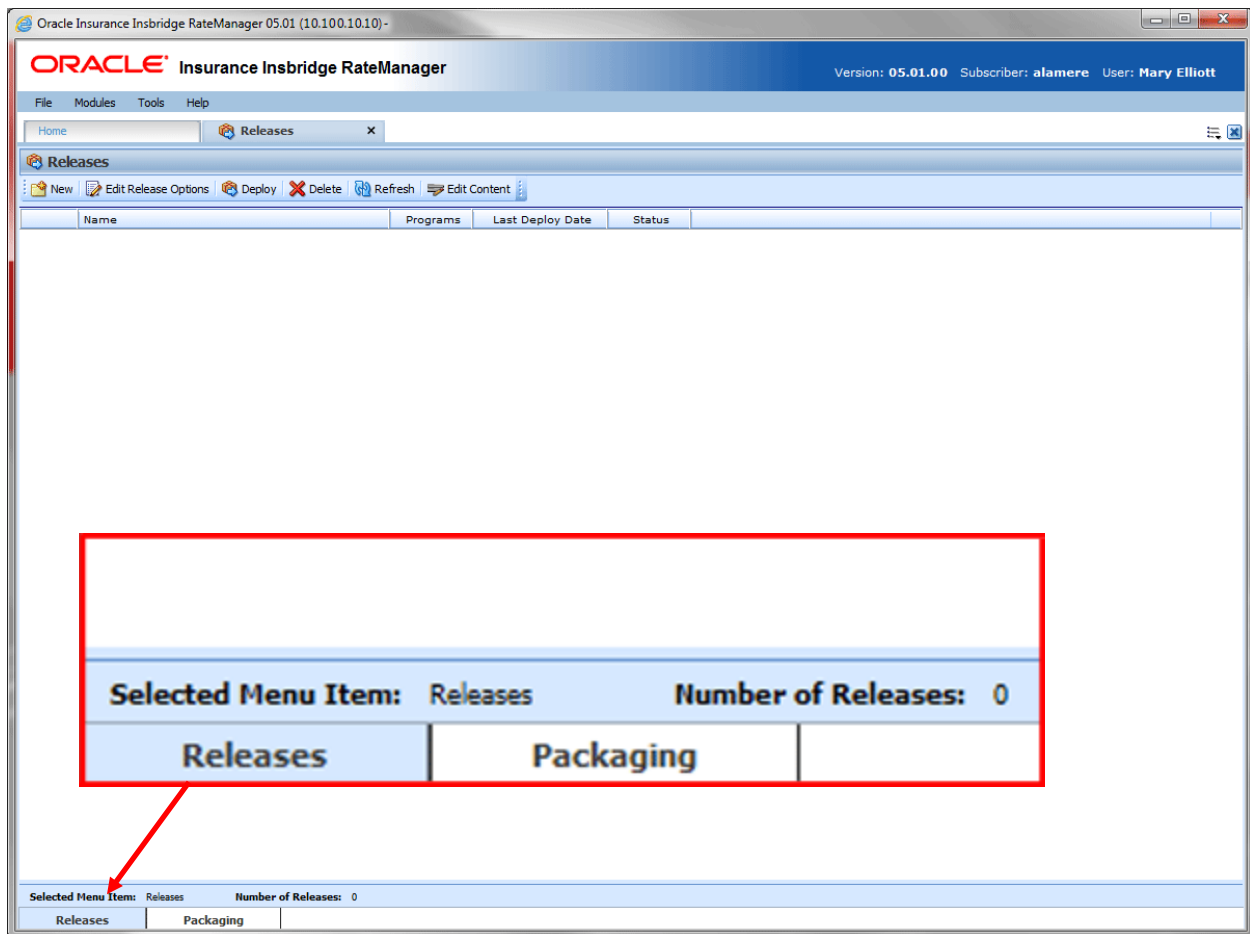
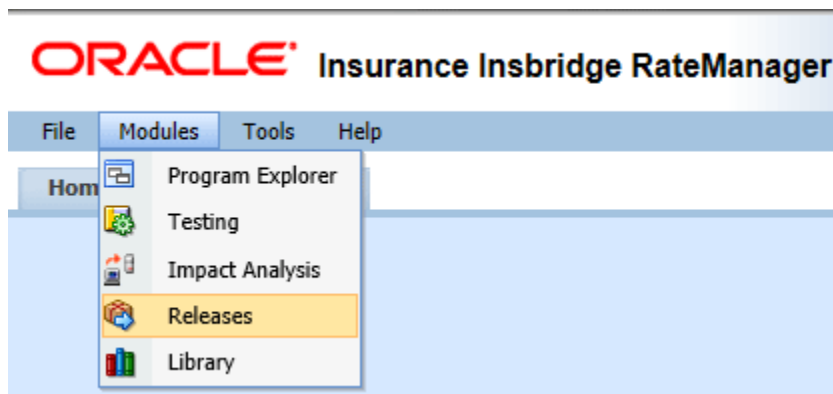


Figure 75 Releases Screen

The **Selected Menu Item** is displayed in the sub-tab you are currently using.

To Navigate to Releases

1. Select Modules→**Releases**.



2. This opens the **Releases** sub-tab. To go to Packaging, click the **Packaging** sub-tab.

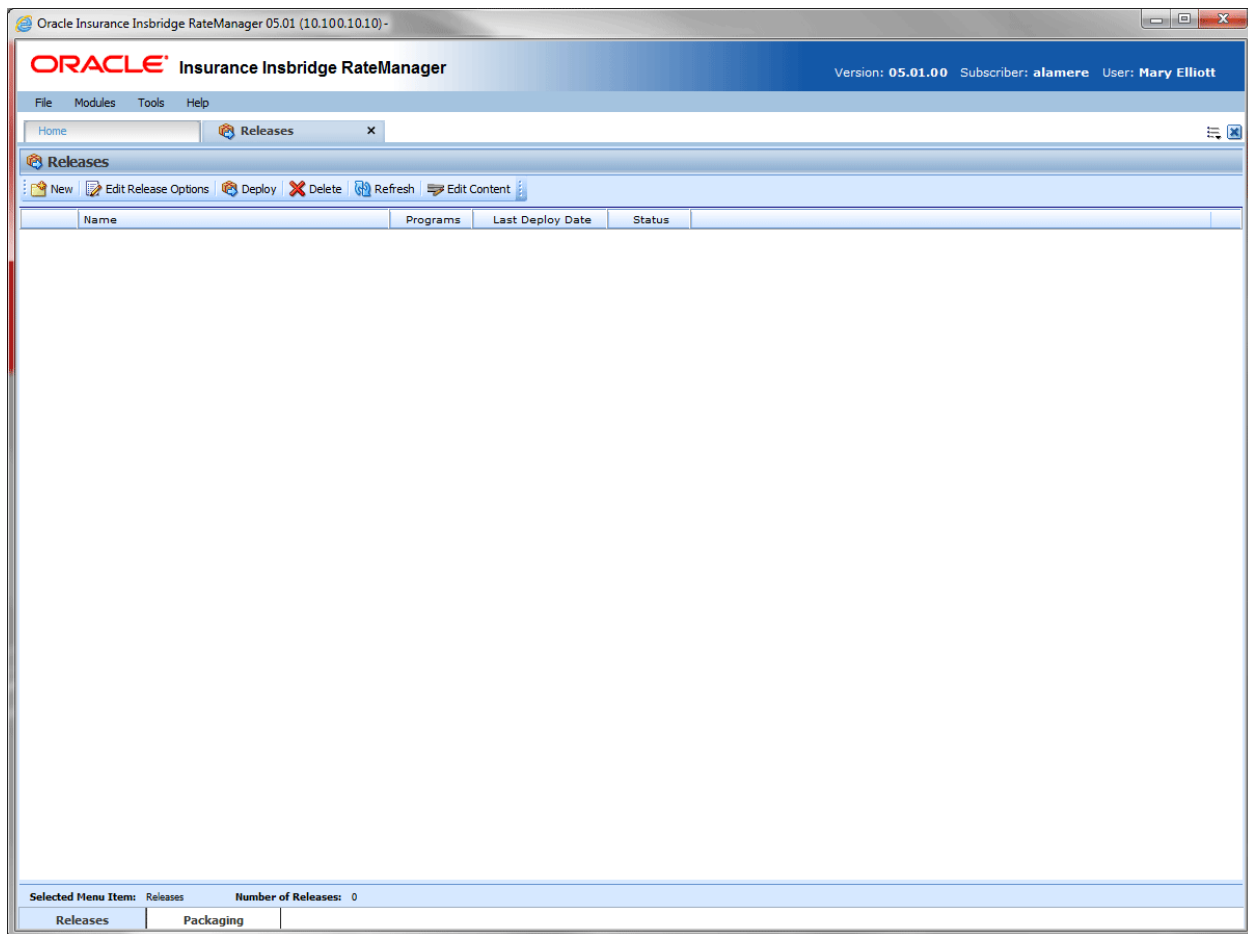


Figure 76 Releases Screen

NOTE: If you do not have Releases as a menu option, please contact your system administrator to request Release rights.

Enforce Release Packaging

The Enforce Release Packaging is set in Preferences by the system administrator. The setting applies to the entire system and all users. The setting can be updated at any time. If you want to remove the packaging requirements, please contact your system administrator

When set to **False**, a release is not required in order for users to create a SoftRater package. False is the default setting.

If set to **True**, a release is required in order for a SoftRater package to be created. If a user wants to create a SoftRater package in the Program Explorer module, a release must be created in the Releases area first. This release must have the program added to it and be unlocked. When the user creates the SoftRater package in Program Explorer, they will have the option to select the Release they want this package to be placed into. If there is no release, or no release that contains that program and is unlocked, then the user will be able to do RateManager packages only.

If the Enforce Release Packaging is set to True, users will have the option to select the Release and not the Environment when they go to package.

A true setting can be used to deploy and load packages into IBFA in batch rather than individually.

Releases Security

Releases Security is activated or deactivated in the Tools→Security module, Group Management→Group Rights.

RateManager Package Admin→Release Management

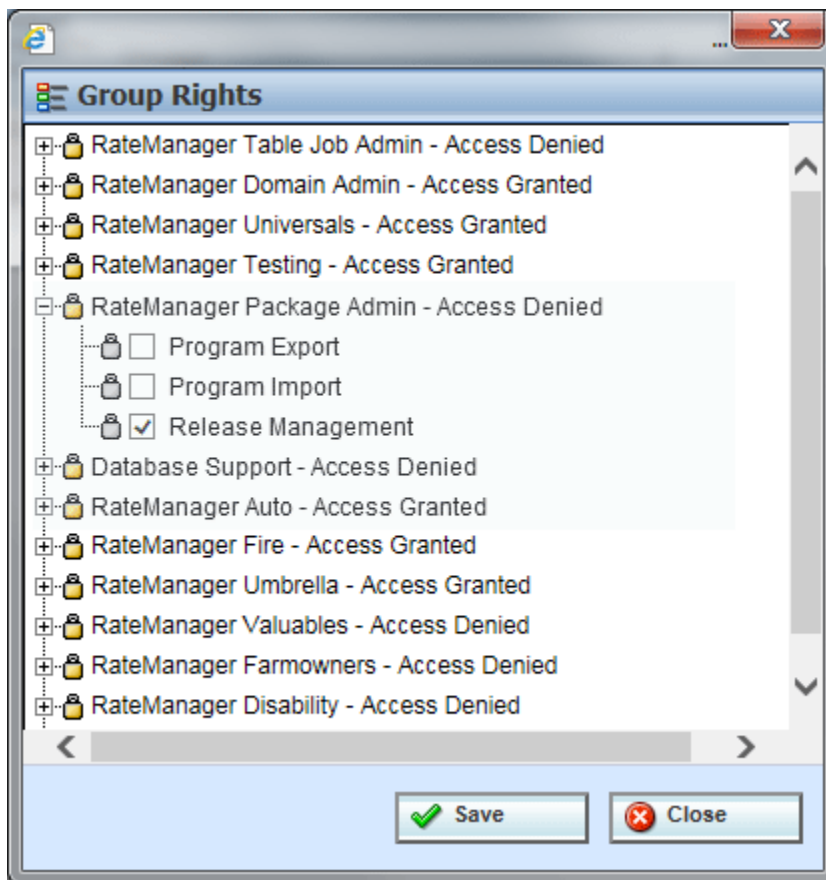


Figure 77 Release Manager Rights

Only users who belong to an Administrator group have the ability to turn the Releases function on or shut it off. This is further detailed in Editing a Group's Rights in the RateManager User Guide.

RELEASES

The first sub-tab is Releases. Releases 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 has the ability to deploy the rates directly to SoftRater without manually loading the packages through IBFA.

From this sub-tab, authorized users can:

- Create New Releases
- Edit Release Options
- Copy Releases
- Lock Releases
- Delete Releases
- Deploy Releases
- Edit Release Contents

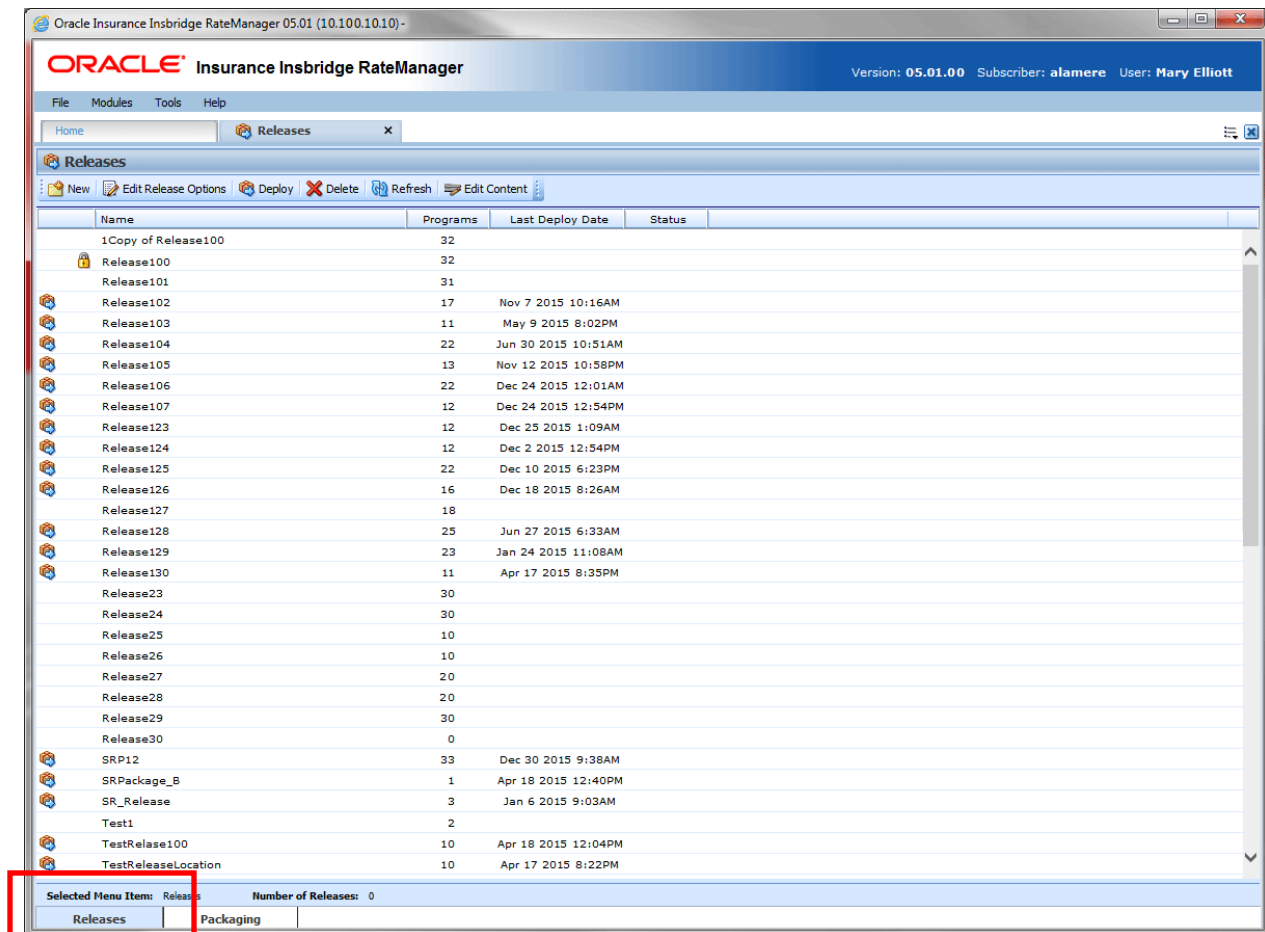

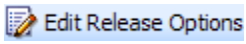
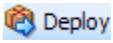

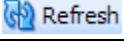
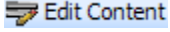


Figure 78 Releases Sub-Tab

FUNCTIONALITY

The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab.

Functions:



	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.
	Edit Content: Opens the Edit Content screen for the currently selected release.

FIELDS

The Releases Listing area displays the releases that have been created. There are six fields in the Releases Listing area.

Releases Listing

Icon Column: The first column displays release icons. There are two release icons:

	Deployed: Indicates that this release has been deployed. Releases with a deployed icon can be edited and deployed again. NOTE: Hover your cursor over the icon to see the last deployment details.
	Locked: Indicates the release is locked. A locked release can be deployed but cannot be edited until the release is unlocked.

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.

Right Click Options

Every release has a right click menu. Menu options vary depending on whether the release is locked or not. To view the right click menu options, select the release you want and right click.

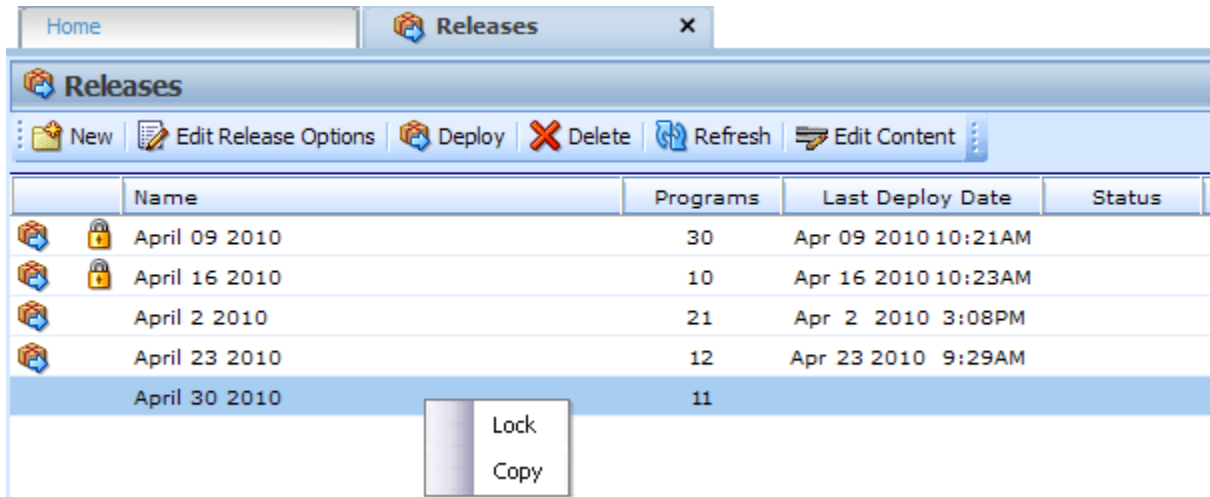


Figure 79 Right Click Menu for the Releases Listing

Releases Listing has two choices:

- **Lock:** Locks the release. This will prevent any further additions or deletions to the release and prevents release options from being edited.

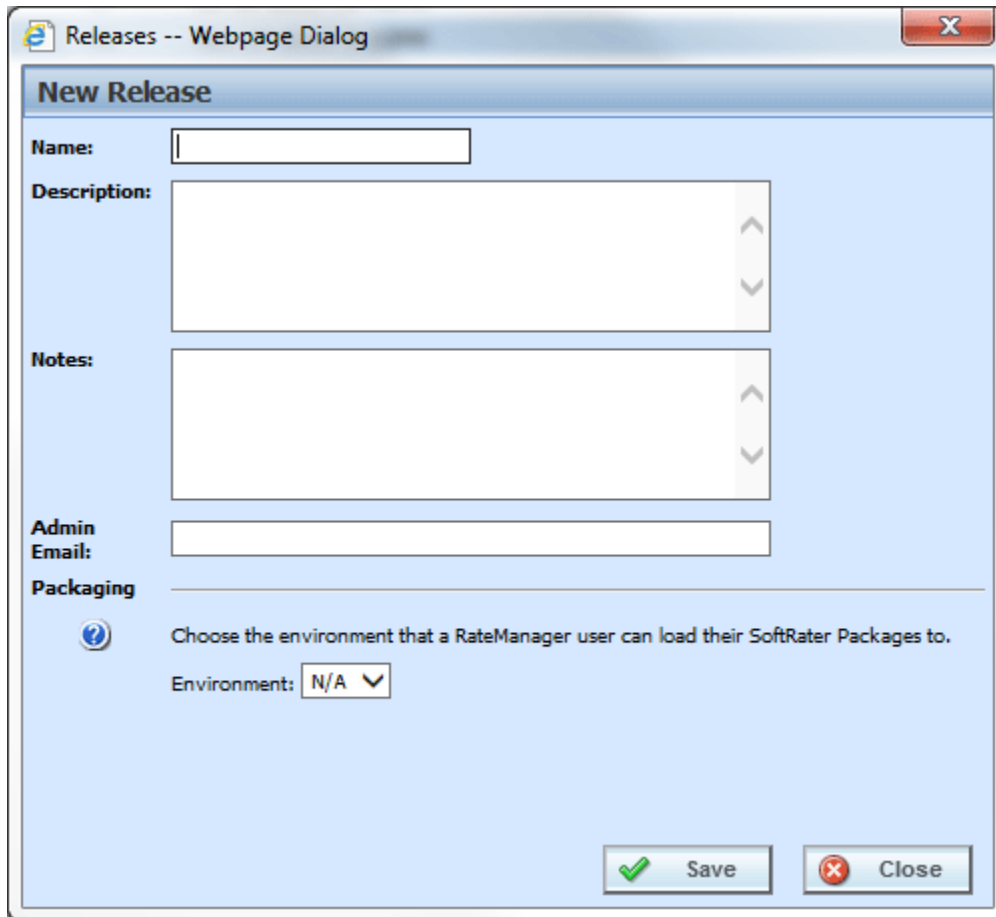
OR

- **Unlock:** Unlocks the release. This will open the release up for editing.
- **Copy:** Copies the release and all contents.

CREATING A NEW RELEASE

New releases can be created at any time. If Enforce Release Packaging is set to True, a release must be created before packages can be deployed to a SoftRater environment.

1. Select **NEW** from the menu bar. This opens the **New Release** window.



The screenshot shows a web browser window titled "Releases -- Webpage Dialog". Inside, there is a "New Release" dialog box. The dialog box has a light blue header and a white body. It contains the following fields and controls:

- Name:** A single-line text input field.
- Description:** A multi-line text area with up and down arrow buttons on the right side.
- Notes:** A multi-line text area with up and down arrow buttons on the right side.
- Admin Email:** A single-line text input field.
- Packaging:** A section with a question mark icon and the text "Choose the environment that a RateManager user can load their SoftRater Packages to." Below this is a dropdown menu labeled "Environment:" with "N/A" selected.
- Buttons:** At the bottom right, there are two buttons: "Save" (with a green checkmark icon) and "Close" (with a red X icon).

Figure 80 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), users CANNOT create a SoftRater package. They will be able to create RateManager 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 the release with the incorrect name and create a new release. Or you can copy the release and name the copy with the correct name. All other fields are open for changes. Locked releases cannot be edited. You will have to unlock the release to edit. Editing is performed in the same screen as creating a new release.

1. Select the release you want to edit and click **Edit Releases Options**.
2. This opens the **Edit Release Options** screen for the release. Make your changes.
3. 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 81 Copy Release

3. Enter in the **Name** of the new release.
4. Click **Copy**. The release is copied.

Locking a Release

A release can be locked 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.

1. Select the release you want to lock and right click.
2. Select **Lock** to lock the release. On the Releases tab, 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.

1. Select the release you want to remove and then click **Delete**. A warning message will be displayed.
2. Select **OK** to remove the release. Select Cancel to return to the Releases tab without deleting a release.

Deploying a Release

A release can be deployed at any time.

1. Select the release you want to deploy and click **Deploy**.
2. This opens the **Deploy Release** window.

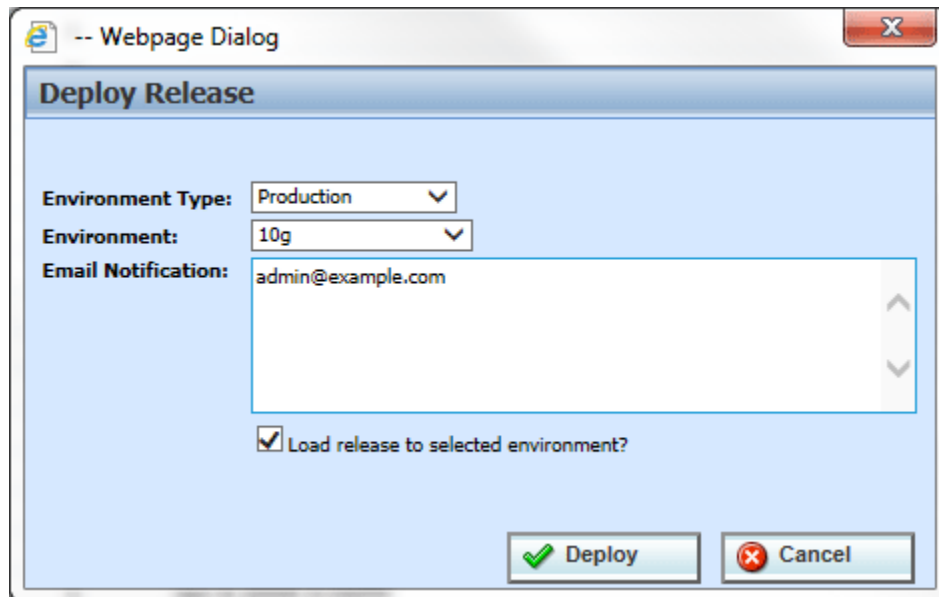


Figure 82 Deploying a Release

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.

EDIT CONTENT TAB

The Edit Content tab can be accessed only from the Releases sub-tab by clicking Edit Content. This tab is where you add or remove programs from the release. You also can create packages from this screen as well as 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. Select the release you want to edit and either double-click it or click **Edit Content**.
2. This opens the **Edit Content** tab for the release.

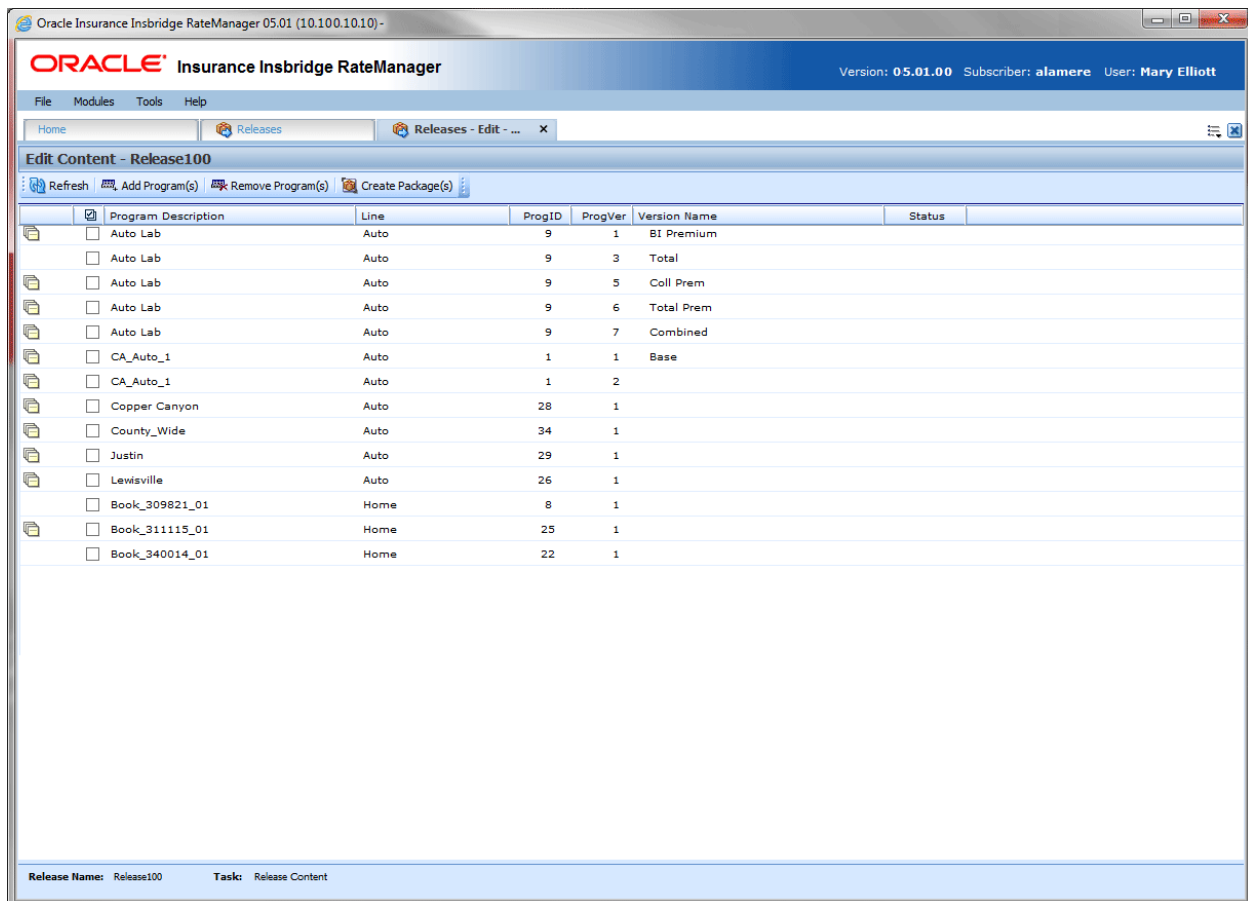






Figure 83 Edit Content for a Release

FUNCTIONALITY

The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this tab.

Functions:



 Refresh	Refresh: Refreshes the Edit Content window.
 Add Program(s)	Add Programs: Opens the Add Program window. This option will not be displayed on locked releases.
 Remove Program(s)	Remove Programs: Removes the selected programs from the release. This option will not be displayed on locked releases.
 Create Package(s)	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.

FIELDS

The Edit Content tab displays the programs or packages that are in the releases.

Edit Content Listing

Icon Column: The first column displays status icons. There are two status icons:

	Deployed: Indicates that this release has been deployed. Releases with a deployed icon can be edited and deployed again. NOTE: Hover your cursor over the icon to see the last package details.
	Locked: Indicates the release is locked. A locked release can be deployed but cannot be edited until the release is unlocked.

Checkbox: Check the box if you want to remove the program or create a package.

Program Description: The name of the program.

Product: The product for the program.

ProgID: The unique program ID for the program.

ProgVer: The version number for the program.

Version Name: The program version name.

Status: Shows if any activity is currently processing for the release content.

Right Click Options

Every program has a right click menu. Menu options vary depending on whether the program is packaged or not. To view the right click menu options, select the program you want and right click.

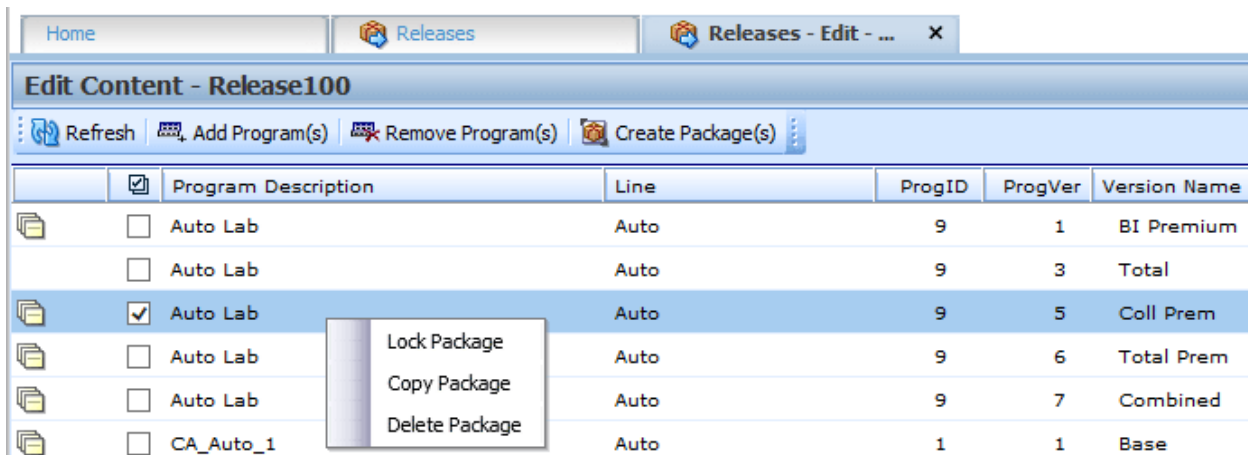


Figure 84 Right Click Menu for the Edit Content Listing

- **Lock Package:** Locks the package for the version. This prevents any editing of the package. The locking applied here does not apply to the version under the product. Only to the version in the release.
- OR**
- **Unlock Package:** Unlocks the package. This opens the program up for editing.
 - **Copy Package:** Copies the selected package into another unlocked release. This option is not displayed on programs that have not been packaged.
 - **Delete Package:** Deletes the selected package from the release. This option is not displayed on programs that have not been packaged.

Locking a Package

Packages or programs can be locked at any time. A locked release automatically has locked packages. A locked package that is not also locked by the release can be removed. The lock function is performed from the right click menu.

1. Select the package you want to lock and right click.
2. Select **Lock Package** to lock the package. On the Edit Content screen, a lock icon will be placed in front of the package.

Copying a Package

Packaged programs can be copied from one release to another. The receiving release must be unlocked. The copy function is performed from the right click menu.

1. Select the package you want to copy and right click.
2. Select **Copy Package**. A separate screen is displayed.



Figure 85 Copying Packages to Another Release

3. Select the release where you want to copy the package to. Only unlocked releases are listed.
4. A confirmation message is displayed. Click OK to copy the package and Cancel to return to the select screen.

Deleting a Package

Packaged programs can be deleted from an unlocked release. The package delete function is performed from the right click menu.

1. Select the package you want to delete and right click.
2. Select **Delete Package**. A confirmation message is displayed.

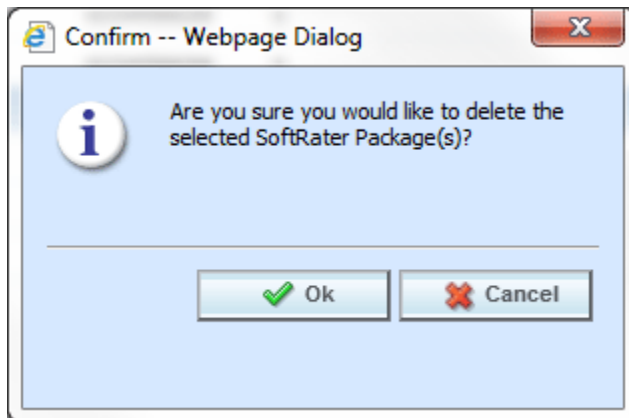


Figure 86 Copying Packages to Another Release

3. Click OK to delete the package and Cancel to return to the Edit screen.

This action removes the package. The program remains. The package icon is removed from the front of the program. The program can be packaged again. If you want to remove the program completely, use the remove programs button in the top bar menu.

Adding Programs to a Release

Multiple program versions from different projects in any domain type may be added to a release at any time.

1. To add a program to a release, click **Add Programs**. The **Add Programs** screen is displayed.
2. Expand the product 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.

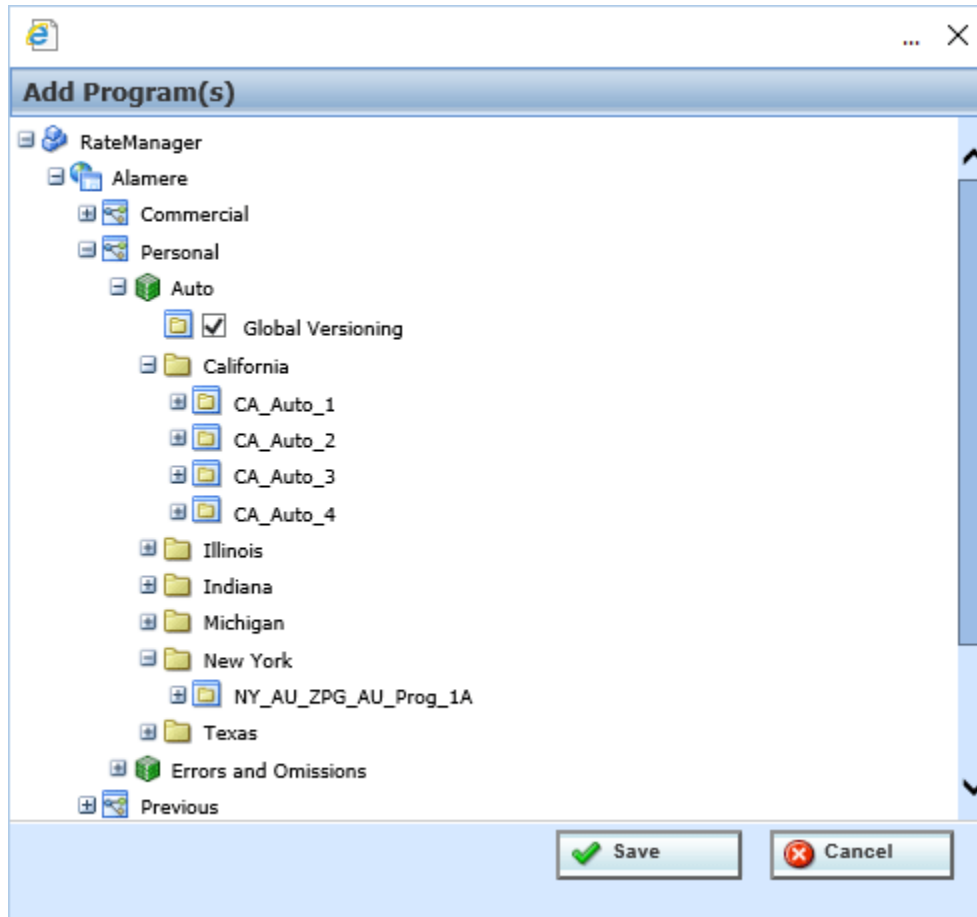


Figure 87 Selecting Versions to Add to a Program

3. Click **Save**. You will be returned to the Edit Content tab. Your selected program versions are listed.

Removing a Program

To remove any unlocked program, place a checkmark in front of the program you do not want and click **Remove Programs**. A warning message confirms your action. Click **OK** to remove the program or click **Cancel** to cancel the action.

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 SoftRater packages from the individual program's **Create Package** window in the Program Explorer module. See Introduction to Packaging in the RateManager Users Guide for more information.

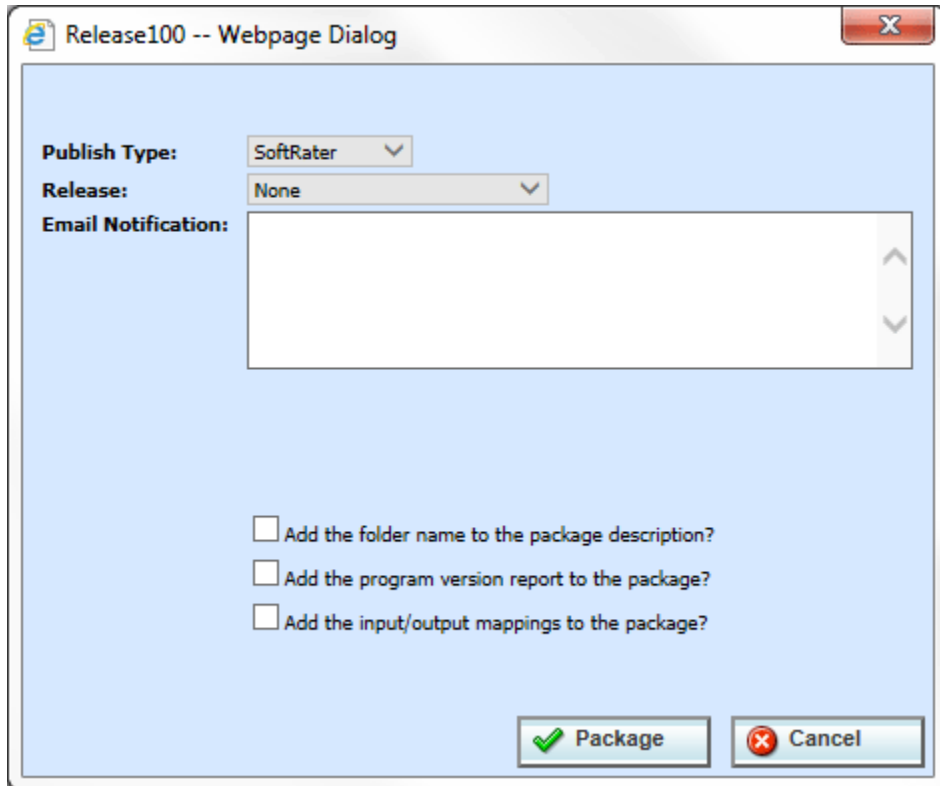


Figure 88 Packaging Programs for a Release

Once the package has been created, package icons appear next to the program descriptions.

PACKAGING

The second sub-tab is Packaging. Packaging is where you can package batches of programs. Batch packaging 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.

From this sub-tab, authorized users will be able to:

- Create New Packaging Jobs
- Edit Packaging Job Options
- Delete Packaging Jobs
- Start Packaging Jobs
- Stop Packaging Jobs
- Edit Packaging Programs

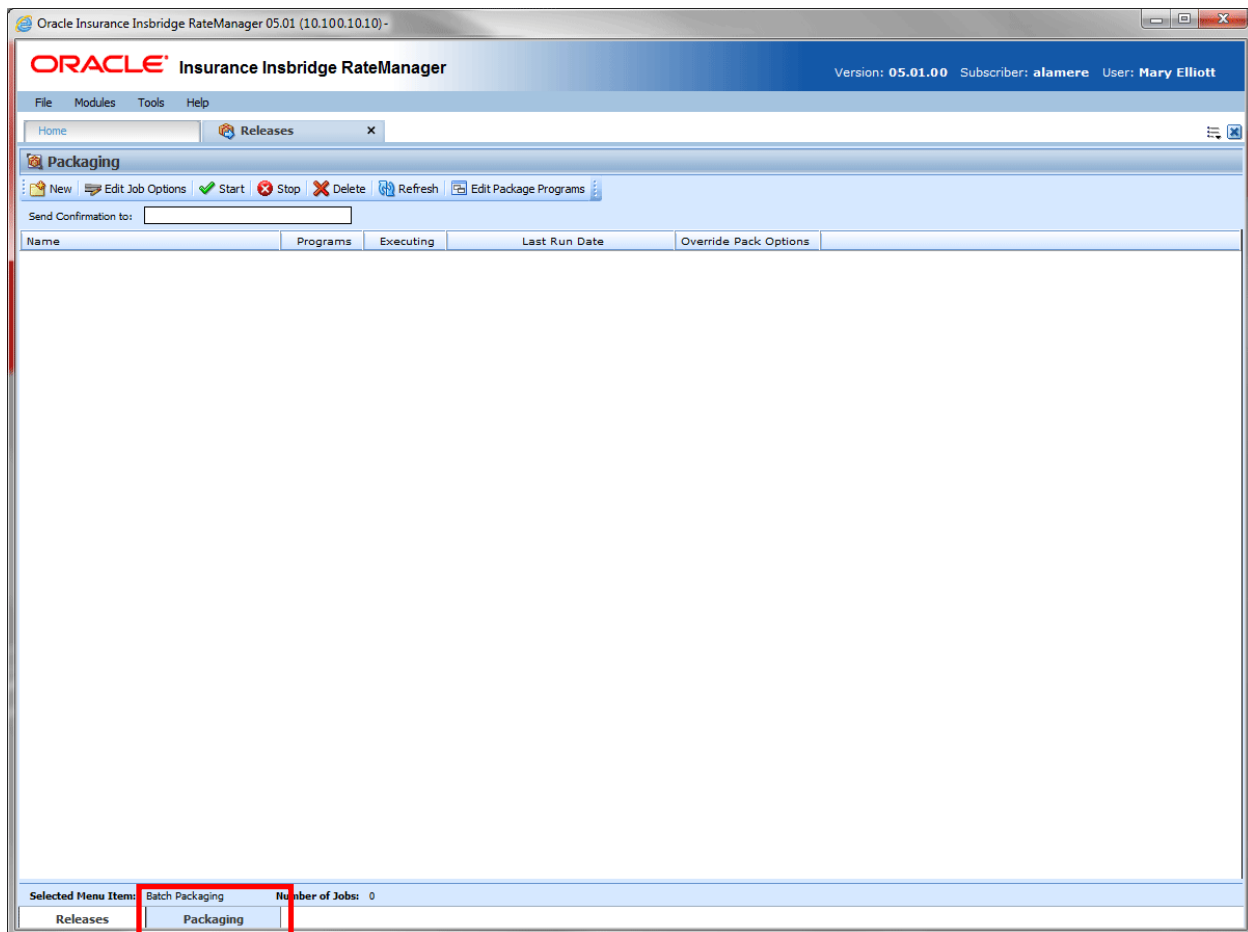

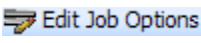


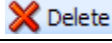
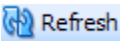
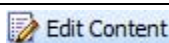


Figure 89 Packaging Sub-Tab

FUNCTIONALITY

The **Menu Bar** is located at the top of the **sub-tab**. The menu bar contains the functions you can perform on this sub-tab.

Functions:

 New	New: Used to create a new packaging job. See Creating a Packaging Job for more information.
 Edit Job Options	Edit Job Options: Used to edit packaging job name and details.
 Start	Start: Starts the packaging request. See Start Packaging for more information
 Stop	Stop: Stops the packaging request. See Stop Packaging for more information.
 Delete	Delete: Removes the selected packaging job.
 Refresh	Refresh: Refreshes the listing of packaging jobs.
 Edit Content	Edit Content: Opens the Edit Content screen for the currently selected job.

FIELDS

The Packaging Listing area displays the packages that have been created. There are five fields in the Packaging Listing area.

Packaging Listing:

Shows a listing of packaging jobs. 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.

Definition Options:

The only definition option is the Send Confirmation to field. This is a required option.

Send Confirmation to: <input type="text" value="admin@example.com"/>	Send Confirmation to: Enter the email address of the person to be notified when the packaging job is complete.
--	---

This is a required field.

Right Click Options

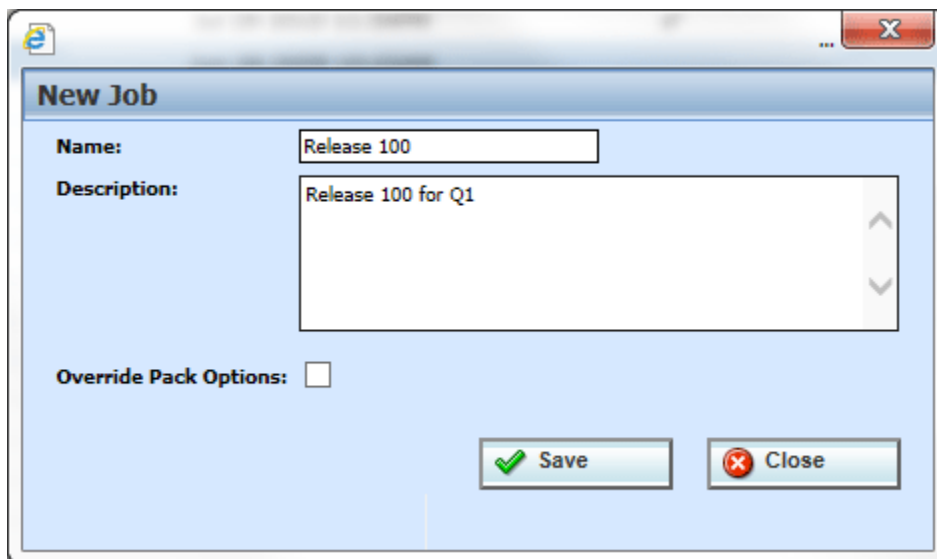
There are no right click menu options for Packaging.

CREATING A PACKAGING JOB

A packaging job can be created at any time.

To Create a New Packaging Job

1. Select **New** from the menu bar. This opens the **New Job** window.



The screenshot shows a 'New Job' dialog box with a light blue background. It has a title bar with a standard Windows icon and a close button. The main area contains three fields: 'Name' with the text 'Release 100', 'Description' with the text 'Release 100 for Q1', and 'Override Pack Options' with an unchecked checkbox. At the bottom right, there are two buttons: 'Save' with a green checkmark icon and 'Close' with a red X icon.

Figure 90 Creating New Job

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

Override Pack Options

Override pack options allows you to select an environment rather than using the default SoftRater environment when batch packaging SoftRater packages.

The Override Pack Options checkbox will always be available to check but it may not always be available to utilize. If Enforce Release Packaging is set to True in Preferences, you will not be able to choose the environment where you wanted the packages to be loaded.

When you attempt to start the batch, you will receive a message.

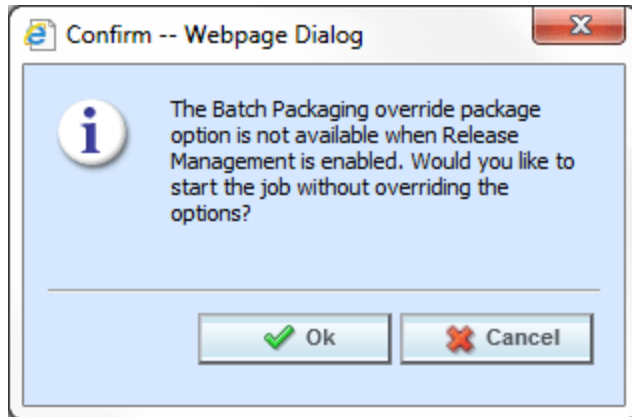


Figure 91 Override Batch Package Options Error

NOTE: Batch Package Override is not available if Enforce Release Packaging is set to True.

To set override options for the program, you must enter the Edit Package Program screen. Select the program where you want to override the environment and click Edit Package Options.

EDITING A PACKAGING JOB

A packaging job can be edited at any time. All fields are open for editing. Editing is performed in the same screen as creating a new packaging job.

To Edit a Packaging Job

1. Select the packaging job where you want to make edits.
2. Select **Edit Job Options** from the menu bar. This opens the **Edit Job** window.
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: No Override

1. Select the packaging job you want to start.
2. Click **Start**. You should receive a message that the batch package request was started successfully.

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

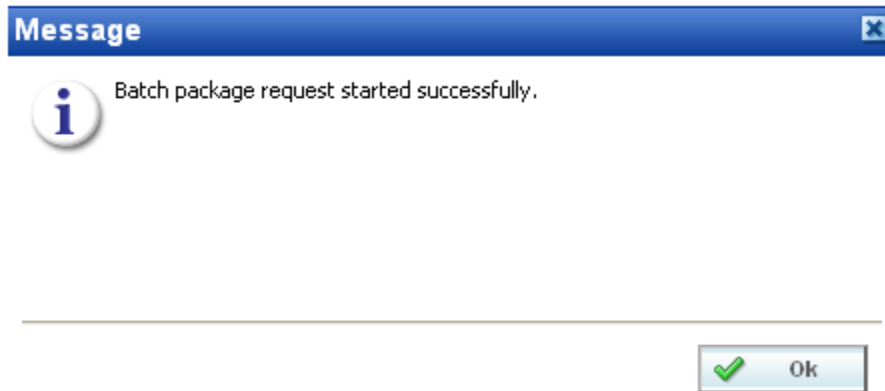


Figure 92 Starting a Batch

3. Click **OK**. On the packaging jobs screen, a checkmark will be placed in the executing column. To see if your job is done, click **Refresh**. The screen will refresh and if the checkmark is gone, your packaging job is done.

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

To Start a Packaging Job: Allowing for Override

If “**Enforce Release Packaging**” is set to **FALSE** in **Preferences**, you will be allowed to set options for the package.

1. Select the packaging job you want to run and click **Start**.

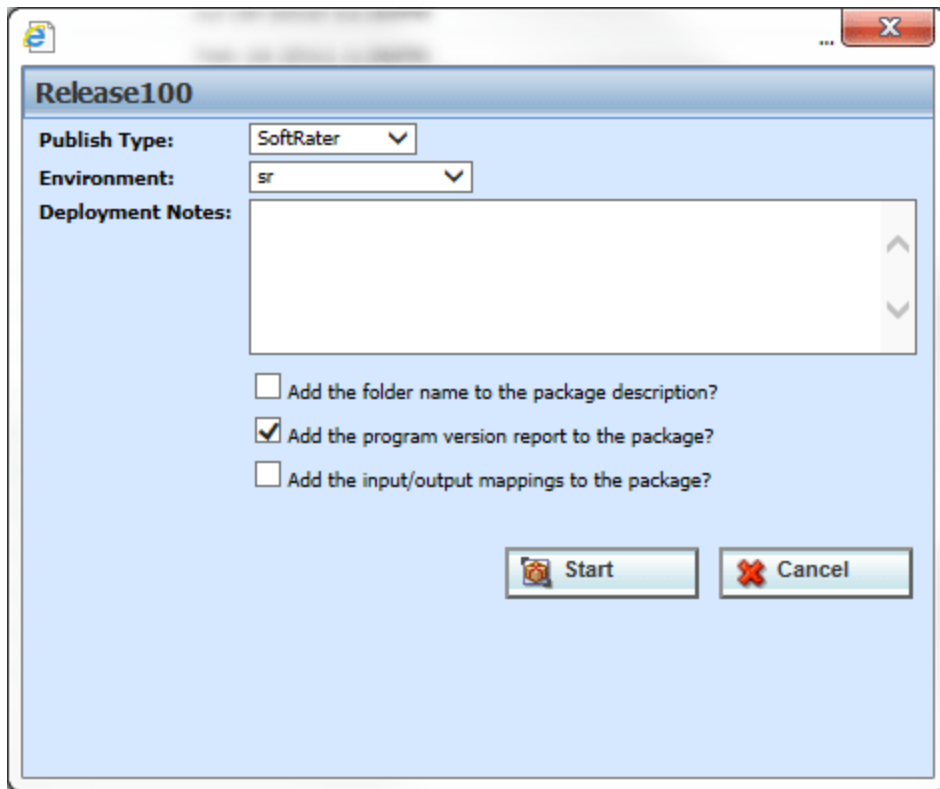


Figure 93 Editing Program Packaging Options Allowing for Override

2. Before the job can begin, you will have to select the environment where you want to package.

Override Options

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

- RateManager
- SoftRater

Environment: If you are creating a SoftRater package, you can select the environment where the package will initially be placed. 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.

Deployment Notes: If you are creating a SoftRater package, you can enter comments about the package. The comments are viewable from the SoftRater Explorer.

Add the folder name to full package description? If you are creating a SoftRater package, check this box to add the folder name to the 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 package. If no input/output mappings exist, this option will not be displayed.

3. After you have made your selections, click **Package** to start the job.
4. On the packaging jobs screen, a checkmark will be placed in the executing column. To see if your job is done, click **Refresh**. The tab will refresh and if the checkmark is gone, your packaging job is done.

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

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

STOP A PACKAGING JOB

Any executing packaging job can be stopped prior to completion or failure. A checkmark in the executing column will indicate if the job can be stopped.

1. 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.
3. Click **OK** to close the message.

An email will be sent to the **send confirmation to** recipient that the packaging job was stopped.

DELETE A PACKAGING JOB

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

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

EDIT PACKAGE PROGRAMS TAB

The Edit Package Programs tab can be accessed only from the Packaging sub-tab by clicking Edit Package Programs. This tab is where you add or remove programs from the batch.

1. Select the packaging job you want to edit and either double-click it or click **Edit Package Program**.

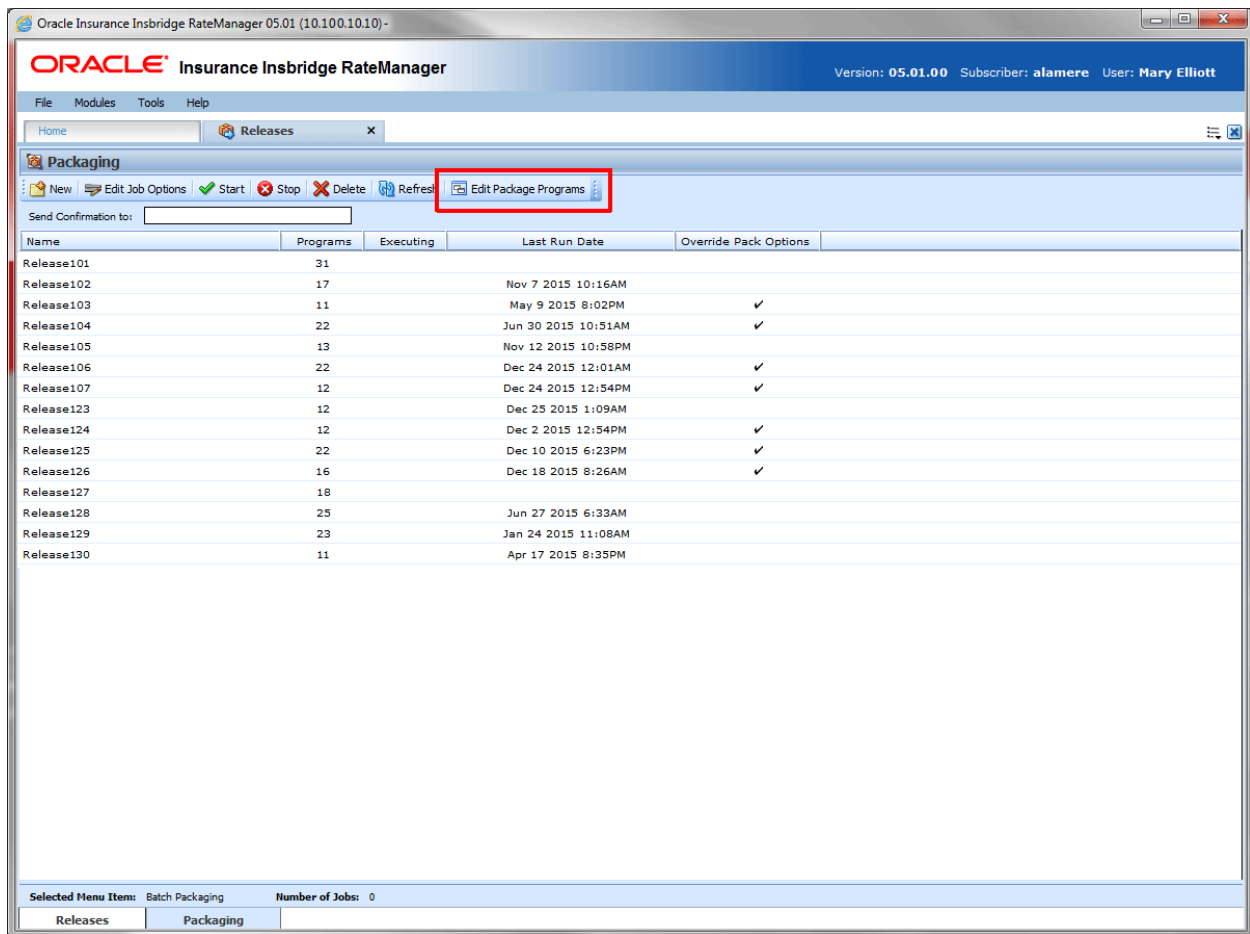


Figure 94 Programs Tab

2. This opens the **Edit Package Program** tab for the batch packaging job.

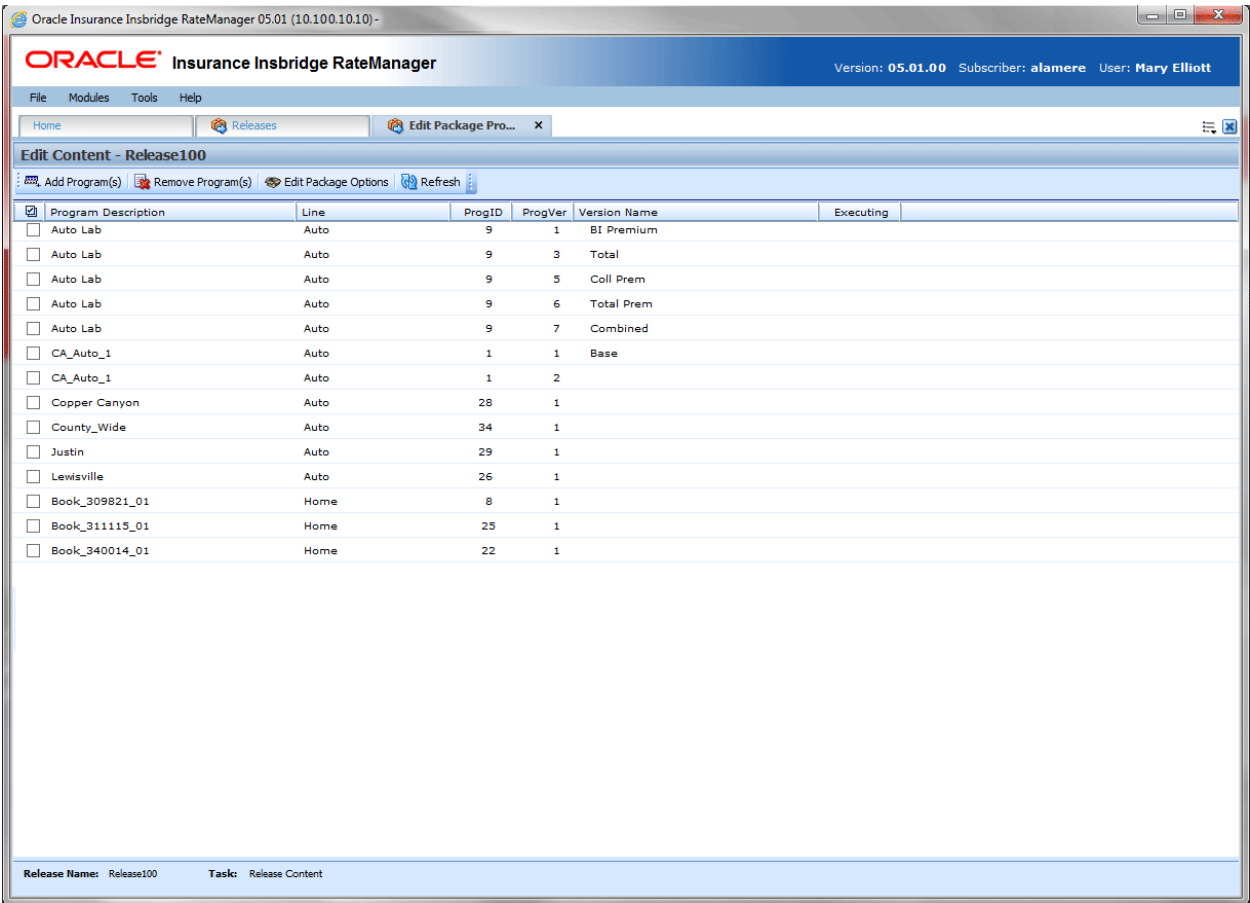






Figure 95 Edit Package Programs

FUNCTIONALITY

The **Menu Bar** is located at the top of the tab. The menu bar contains the functions you can perform on this tab.

Functions:

 Add Program(s)	Add Programs: Opens the Add Program window.
 Remove Program(s)	Remove Programs: Removes the selected programs from the release.
 Edit Package Options	Edit Pack Options: Allows for changes to the packaging options.
 Refresh	Refresh: Refreshes the Content window.

FIELDS

The Edit Package Programs tab displays the programs that are in the batch package. There are six fields in the Edit Package Program Listing.

Edit Package Program Listing

Checkbox: Check the box if you want to remove the program.

Program Description: The name of the program.

Product: The product for a specific program.

ProgID: The unique ID for a specific program.

ProgVer: The version number for a specific program.

Version Name: The program version name.

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

Right Click Options

There are no right click menu options for Edit Package Programs.

Adding Programs to a Batch Packaging Job

Multiple programs and program versions from different products, both user created and template generated may be added to a packaging job at any time. A packaging job cannot be run until programs have been added to it.

1. To add a program to a packaging job, click **Add Programs**. The **Add Programs** screen will be displayed.
2. Expand the product 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 packaging job.

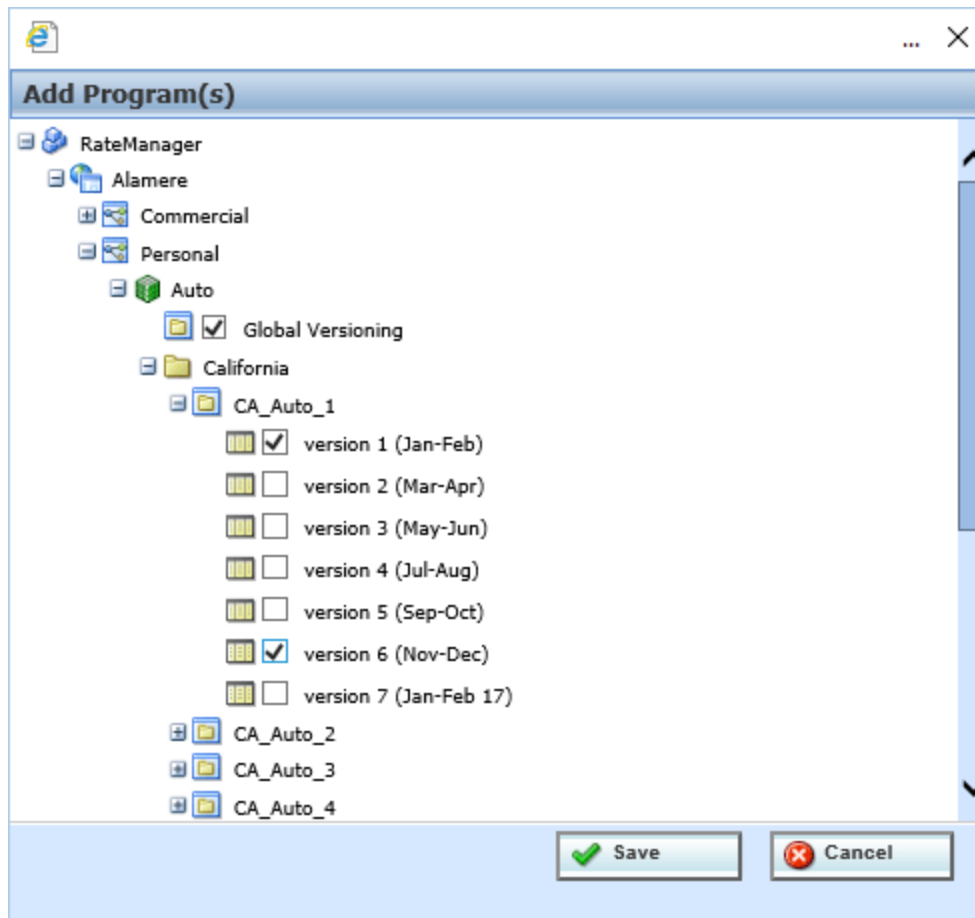


Figure 96 Selecting Versions to Add to a Program

3. Click **SAVE**. You will be returned to the Edit Package Program tab. Your selected versions will be listed.

Removing a Program

To remove any program, place a checkmark in front of the program you do not want and click **Remove Programs**. A warning message will confirm your action. Click **OK** to remove the program or click **Cancel** to cancel the action.

Editing Package Options

Editing Package options allows for changes to be made to the packaging environment.

Editing Package Options: Allowing for Override

If “**Enforce Release Packaging**” is set to **True** in **Preferences**, you can select a testing environment for the package.

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

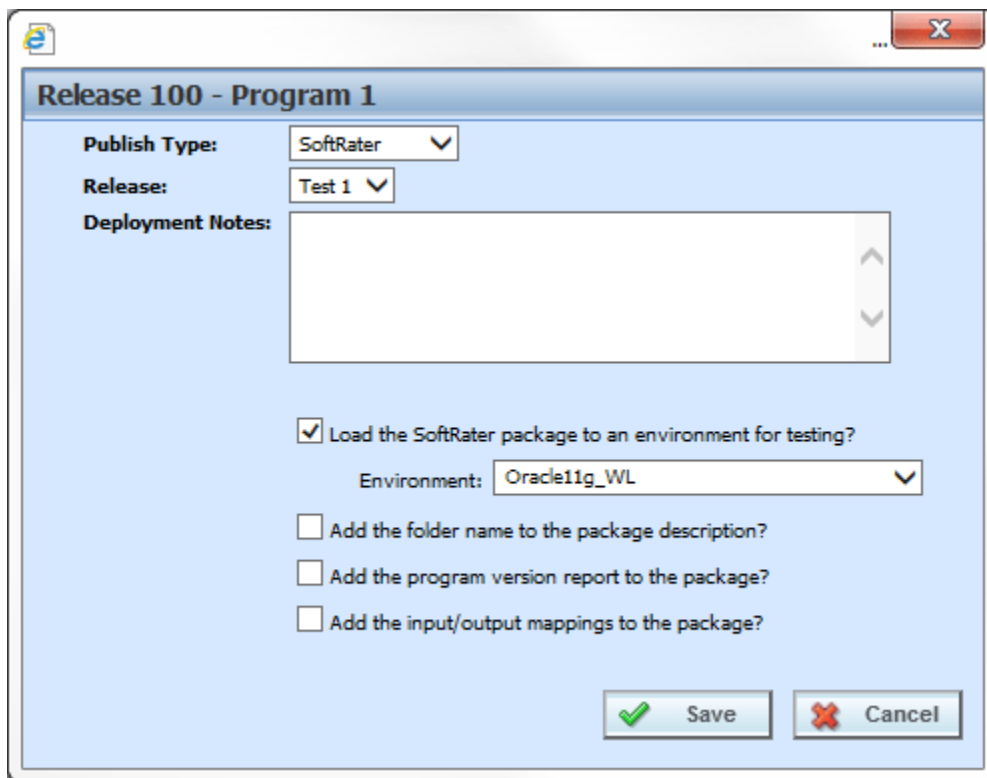


Figure 97 Editing Program Packaging Options Allowing for Override

NOTE: You may need to expand the screen to view the Save and Cancel buttons.

Screen Options

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

- RateManager
- SoftRater

Release: Select the release where you want to place the packages.

Deployment Notes: If you are creating a SoftRater package, you can enter comments about the package. The comments are viewable from the SoftRater Explorer.

Load SoftRater 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 SoftRater package, check this box to add the folder name to the 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**.
3. You can edit as many packages as you need. 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 Package Options: Not Allowing for Override

If “**Enforce Release Packaging**” is set to **FALSE** in Preferences, you will not be able to select an environment to load a package for testing.

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

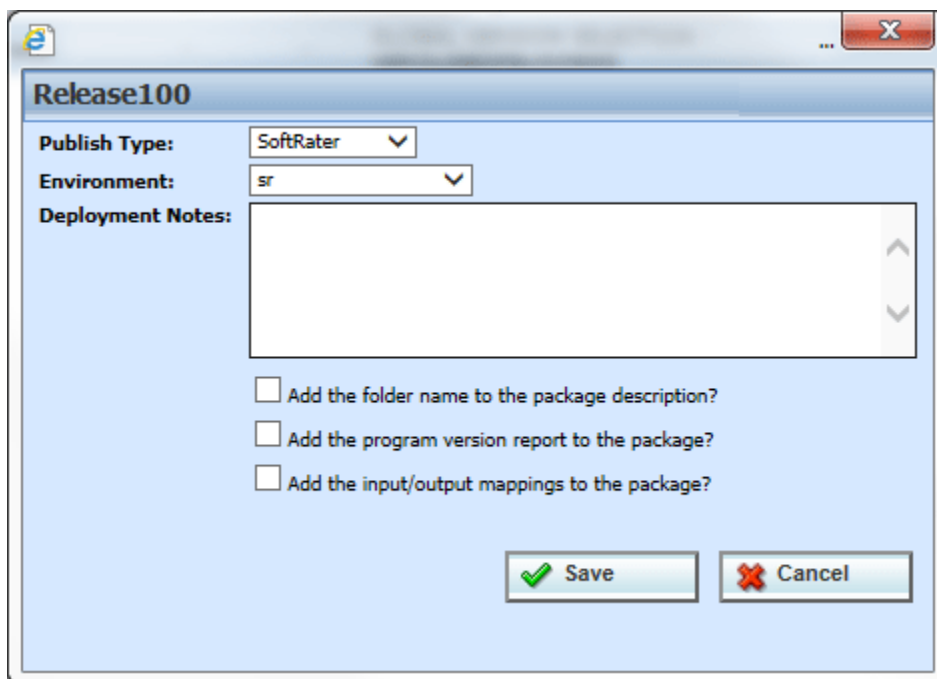


Figure 98 Editing Program Packaging Options Not Allowing for Override

Override Options

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

- RateManager
- SoftRater

Environment: If you are creating a SoftRater package, you can select the environment where the package will initially be placed. 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.

Deployment Notes: If you are creating a SoftRater package, you can enter comments about the package. The comments are viewable from the SoftRater Explorer.

Add the folder name to full package description? If you are creating a SoftRater package, check this box to add the folder name to the 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 package. If no input/output mappings exist, this option will not be displayed.

2. When you have finished setting the packaging options, click **Save**.
3. You can edit as many packages as you need. 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.

LIBRARY

The Library tab is a central repository within RateManager where export programs, template programs, public XML files, custom XML, Oracle Insurance Product Configuration, and table export files are stored and managed. The export programs option allows for user created programs to be moved in and out of the system. The template option allows for programs created outside of the subscriber to be moved in and out of the system. The public XML option allows users to upload a single program created in an outside source using standard XML format, in to RateManager. The custom XML option allows users to park custom XML mapping files that can be used by any program that uses custom mappings.

The Library tab is available from the Modules menu or from the Library snap in the Control Panel on your Home tab. The Library tab is open to all users for viewing. To perform tasks, you must have permissions. If you do not have permissions, please contact your system administrator.

To begin, select the option of where you want to work from the View menu.

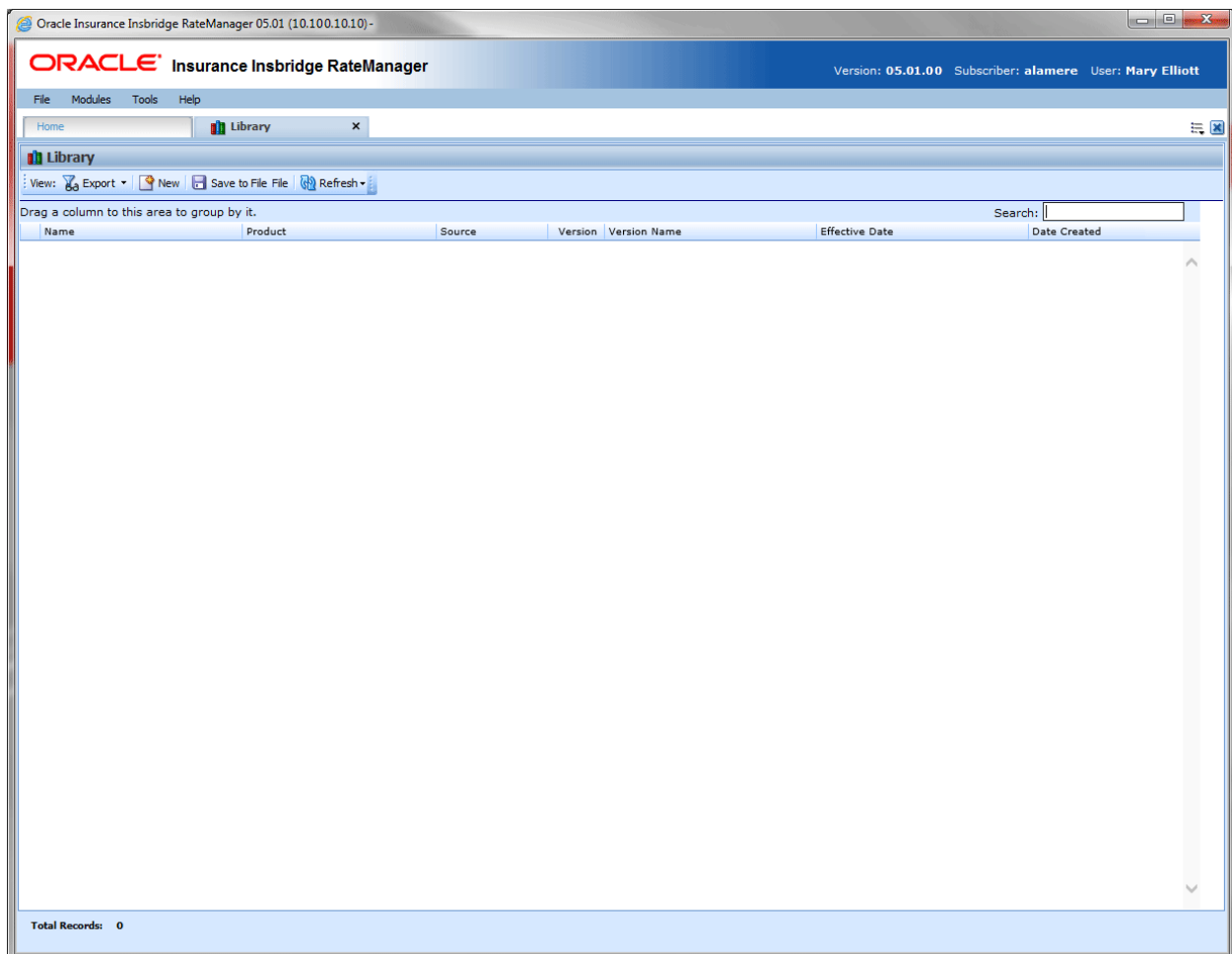


Figure 99 Library

From the Library tab you can:

- Create a new template or export program
- Edit a template, export program, custom XML, or public XML file.
- Save a template, export program, custom XML, or public XML file to your local hard drive
- Upload a template, export program, custom XML, or public XML file from your local hard drive
- Delete a template, export program, custom XML, or public XML file
- Apply a template, export program, or Public XML file
- View table export files

LIBRARY OPTIONS

The options on the Library tab are:

- Export
- Templates
- Custom XML
- Public XML
- Product Configuration
- Table Exports

Exports

The export and template screens look similar and have similar functionality. The main difference is that programs on the export screen can be applied to any domain type and template programs can be applied to user created domain types.

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. All versions of a program will be exported. Individual versions cannot be exported.

- All elements related to a program will be exported including:
 - Global Input Variables
 - Global Result Variables
 - Local and Global Table Variables
 - Local and Global Calculated Variables
 - Local and Global Algorithms
 - Sequencing
 - Program Versioning
 - Categories
- The export includes 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.*

Insbridge message service needs to be running.

NOTE: *Previous import/export programs are not accepted into the Library tab Exports option.*

Templates

Templates are exact copies of existing program versions within a product 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 create templates that other users will upload into their RateManager environment or you can upload templates created by other users into your RateManager environment. You cannot upload a template that you have created back into your project. 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 uploaded by users within the group. 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 upload and apply templates. If your group has the rights to program export, you will be able to export templates.*

Custom XML

Frequently used custom XML mapping templates can be uploaded in to the Library tab and then used by any program that uses custom mappings. Custom XML files can be for input, output, or both.

ACORD XML templates are provided for 23 Products, available from the SDK directory where Insbridge is installed. Accessing the templates requires permissions to the SDK file on the server where Insbridge is installed. Please contact your system administrator for access.

The maximum file size is 10mb.

Public XML

NOTE: *Public XML is compatible with release 4.9 and earlier.*

Public XML allows users to upload a single program created in an outside source using standard XML format, in to RateManager.

Public XML files are created outside of RateManager. A public XML file can be a complete single program version, from categories to output mapping or a partial single program version for example, only categories and table variables. To bring a public XML file in to RateManager, the file must be in a zip format.

If categories are not present, the applied XML file will fail. Public XML will allow users to upload an XML file with program details, categories and one or no other elements or a complete program including global and local elements plus sequencing and mapping.

An applied public XML file can be view, edited, updated or deleted. There are no locks on any elements or restrictions on actions to the program.

All elements and programs will be a single version or revisions. Multiple element revisions and programs with multiple versions cannot be created using Public XML.

For more information on creating a public XML file, please see the Insbridge Publix XML Format Guide.

Product Configuration

Insbridge has been integrated with Oracle Insurance Product Configuration (PC). PC is a web-based insurance product modeling solution that centralizes product data and validation rule definitions, providing a single product schema reference for integrated external systems. Integration allows for a product data model created in PC to be imported in to Insbridge. Once imported, the data model can be used to create rating programs. Integration with Insbridge allows for one business model to be used and for one place to manage data or make updates. The data can be re-imported in to Insbridge as needed. This assures that the same data values are used throughout the policy process.

Once applied in Insbridge, an inheritance schema that contains the definitions of the objects (categories or risk items) and fields (inputs and outputs) can be used to model multiple products. Since it is defined in one place, it can be shared across multiple systems. This means that your objects and fields are defined in the same way in every system throughout the product lifecycle. A reusable schema reduces data type incompatibility, mapping errors, and conflicting definitions that can be found in many multisystem environments.

PC requires setup changes in RateManager. The Product Configuration server URL must be entered in order for the PC domain type to be presented. There also is an option to only allow the PC domain type to be presented to users. If the PC domain type is not present, please contact your system administrator.

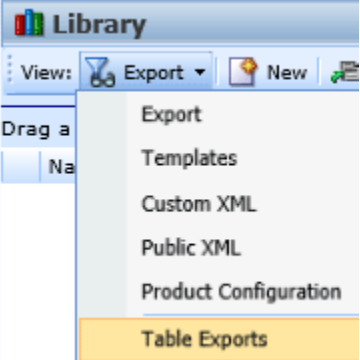

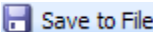


Table Job Management

Table Job Management allows users to export table variables in to a Microsoft Excel workbook. With this feature, users create jobs, select one or more table variables, and then submit the job for processing where the variables are exported in to an Excel workbook.

Any user can select to run a single table variable export or add to an existing table variable export job. Users with permissions can manage jobs on the Table job Management tab. Jobs can be edited to include or exclude selected tables, add notes, or change the email notification. Jobs can be submitted for processing at any time. When finished, an email is sent to the designated contact and the job status is updated. Excel files are listed on the Library tab. Files on the Library tab can then be downloaded to the users network or local hard drive. If multiple table variables are in the job, one workbook is returned for each table. Each table is presented on a separate worksheet.

FUNCTIONALITY

The top bar menu contains the functions you can perform on this tab. The functions change depending on what option you select.

	<p>View: Select the option you want to view.</p>
	<p>New: Begins the process of creating a new export program or template.</p> <p>This option is not available on Custom XML, Public XML, Product Configuration or Table Exports.</p>
	<p>Save to File: Saves a copy of the export program, template, custom XML file or public XML file to your local drive or network.</p>
	<p>Refresh: Refreshes the screen. You may need to use this when uploading exported programs, templates, custom XML files, public XML files, or table exports. This option can be set to run automatically. This refreshes the screen on a regular basis.</p>
	<p>Search: A searching option is located on the far right side of the top bar menu.</p>

Drag Column to Group:

At the top of the screen is a sorting option that allows you to drag a column to sort by.

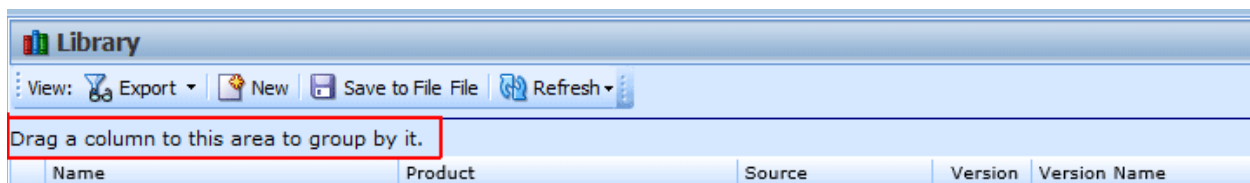


Figure 100 Drag Column on Library Tab

FIELDS

The fields on the Library tab change depending on what the selected view is. For Export, Template, Public XML, and Product Configuration the displayed fields are:

Name: The name of the program template.

Product: The Product for the program template.

Source: The name of the subscriber who created the program template.

Version: The version of the program the template was created from.

Version Name: The optional name of the program version where the template was created.

Effective Date: The effective date of the program.

Date Created: The date the program template was created.

The fields for Custom XML are:

Name: The name of the XML file.

Scope: Indicates if the XML template is to be used for Input Mapping, Output Mapping or both.

Available: Indicates if the XML template should be available from the Input and/or Output Custom XML Mapping screens.

Date Last Modified: The date the file was added to the Library tab.

Right Click Menus

The right click menus vary according to the option selected.

- **Apply:** Applies to a new program folder. Export and Public XML allow files to be applied to New Programs only. Templates allow for updated templates to be applied to existing program folder. Custom XML cannot be applied from the Library tab.
- **Edit Details:** For Exports, the name can be edited. For Templates and Public XML, the name and version can be edited. For Custom XML, the Mapping Scope and the Availability can be changed.
- **Save to File:** Saves the file to your local hard drive or network. Exports, Templates, and Public XML are saved as .srtp files. Custom XML files are saved as an .XML file.
- **Delete:** Removes the file from the Library.

WORKING WITH EXPORTS

The Exports option allows you to:

- Create a New Export
- Apply an Export to a New Program
- Edit Export Details
- Delete an Export
- Save an Export to your local computer or network
- Upload an Export File

Create a New Export

1. Navigate to the **Library** tab.
2. Select **Export** for the View.
3. Click on **New**. The New Program Export popup is displayed.
4. Select the **Program** you want to export.

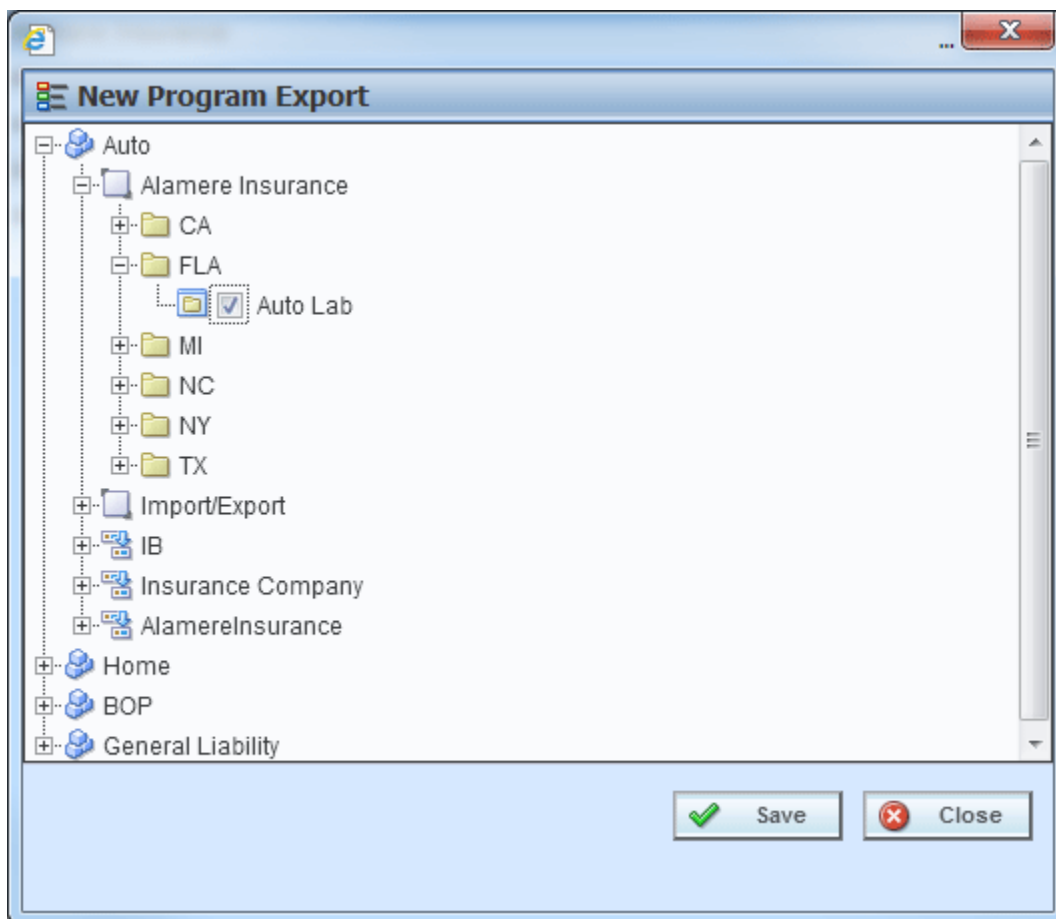



Figure 101 Applying a New Template

5. Click **Save**. The popup closes. When the screen refreshes, your export will be listed.

A spinning icon  indicates that the creation process is occurring. If the icon continues, please click **REFRESH** to refresh the screen.

Applying Exported Programs

Export 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 from Program Explorer and apply the correct program. Program names must be unique.

The Apply Program Export Wizard allows you to apply programs into RateManager. The applied program is placed into the same product that the program was exported from.

1. Select the **Export** you want to apply.
2. Click **Apply->New Program** to open the Apply Program Export wizard.

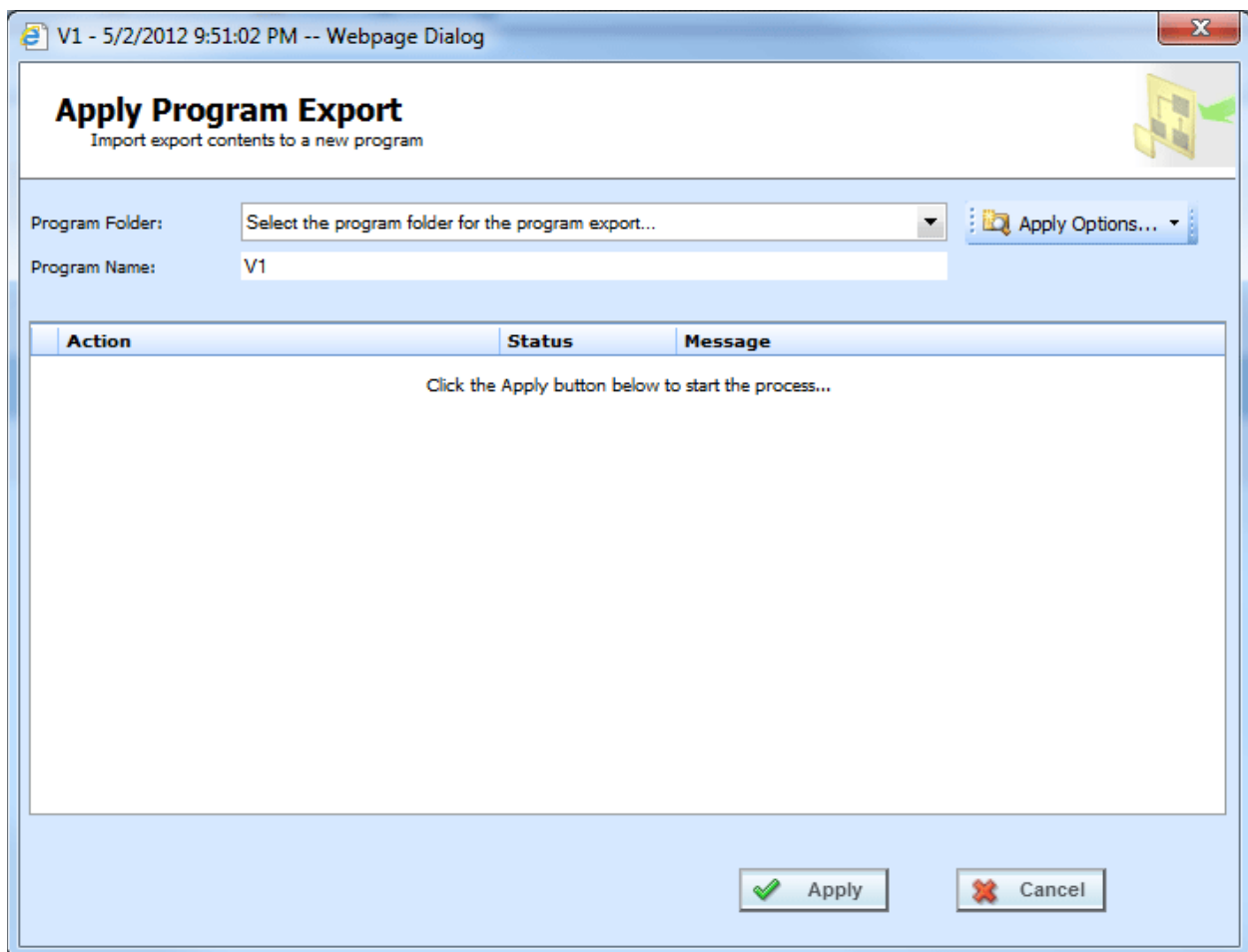


Figure 102 Apply Export Start

3. Select the **Program Folder** where you want the export to be applied.

4. You can update the **Program Name**.
5. Click **Apply** to start the wizard.
6. The wizard begins. A successful apply displays

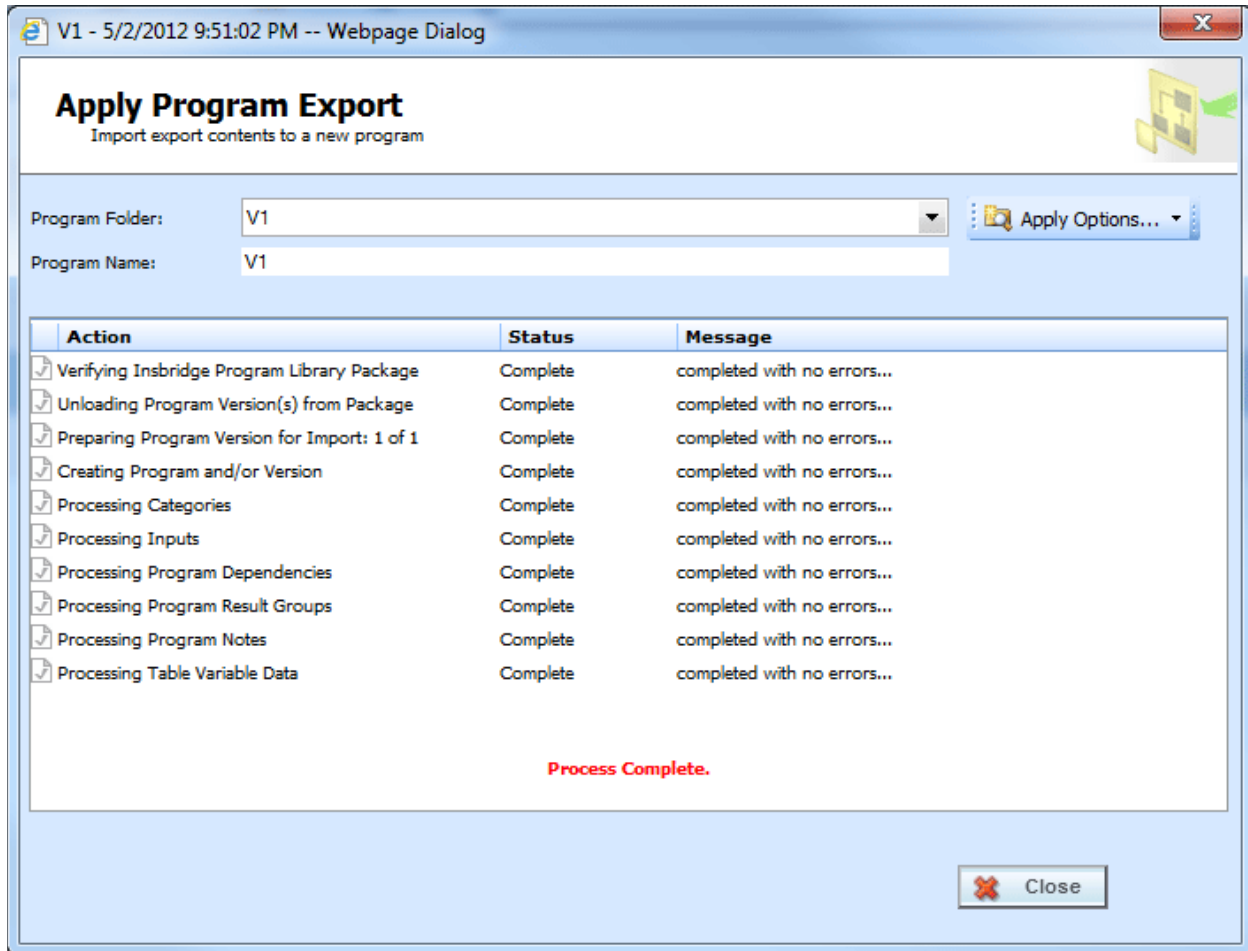


Figure 103 Apply Export Finish

If the Apply Program Export fails, a failure message will be displayed on the element that failed. Error logs are in IBFA and may require a system administrator to access.

Errors in Exported Programs

Programs may complete the wizard but still contain errors. If an export contains errors an exclamation point is displayed in front of the export name. The only right click option will be to delete.

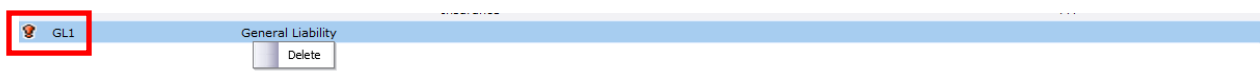


Figure 104 Error in an Export Program

Apply Options

If the exported product is not selected in a project, the Program Folder will display *No PRODUCT found* for the Product information. You will have to add the product to a project before this program can be applied. If you attempt to apply a non-selected product, an error message will be displayed.

Products can be selected from the Apply Wizard. Apply Options are:

- **Select Products:** Use this option to select a product and add it to a project. This option can be used if you receive a *No PRODUCT found* error message when applying an export. Permissions are needed to select products.
- **New Project:** Use this option to create a new project. A new project can be created at any time. New projects allow globals to be unique to the project. Projects are created using a name only. Permissions are needed to create projects.
- **Manage Folders:** Allows you to create a new folder in the selected project. To create a folder, you must select the project first. New folders are created using a name only. Permissions are needed to create folders.

These options may be grayed out if you do not have permissions. If you are denied access, please contact your system administrator for permissions.

Editing an Export

Exports can be edited at any time. Exports must be edited one at a time.

1. Select the **Export** you want to edit.
2. Click **Edit Details** to open the Edit Export popup.

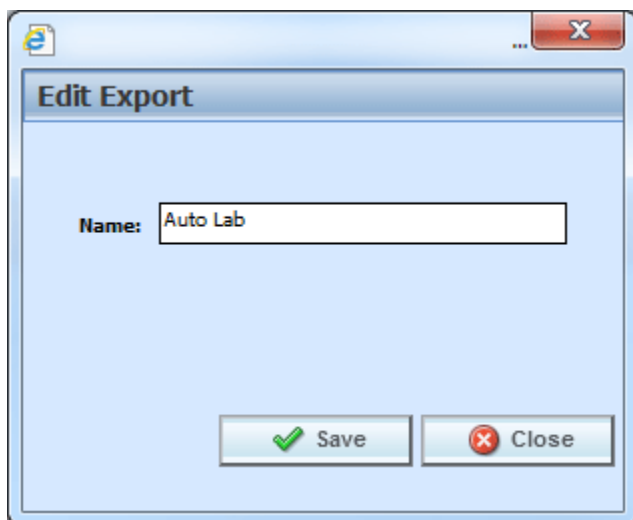


Figure 105 Editing an Export

3. You can change the **Name**.

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

Deleting an Export

Exports can be deleted at any time. Deleting an export from the library does not remove any applied export programs.

- Select the **Export(s)** you want to delete.

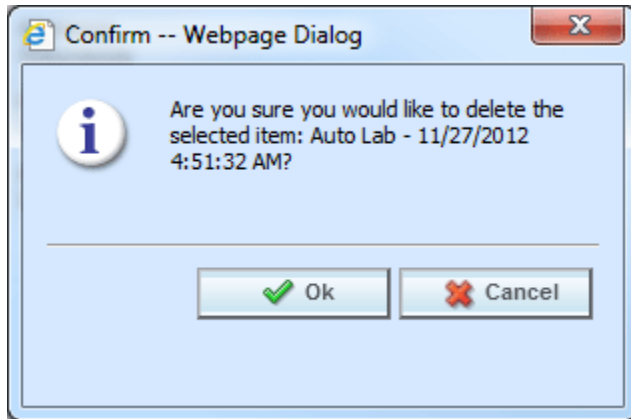


Figure 106 Deleting a Template

- Click **Delete**. A separate screen is displayed. Select **OK** to delete the export. Click **Cancel** if this not the option you want. The export will be removed immediately.

WORKING WITH TEMPLATES

The Templates option allows you to:

- Create a New Template
- Apply a Template to a New Program
- Apply a Template to an Existing Program
- Edit Template Details
- Delete a Template
- Reconcile Templates
- Save a Template to your local computer or network
- Upload a Template File

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 program versions in user created domain type. You cannot create a template from a template program.

- Select **Templates** for the View.

- Click on **New** and the New Program Template Wizard is displayed.

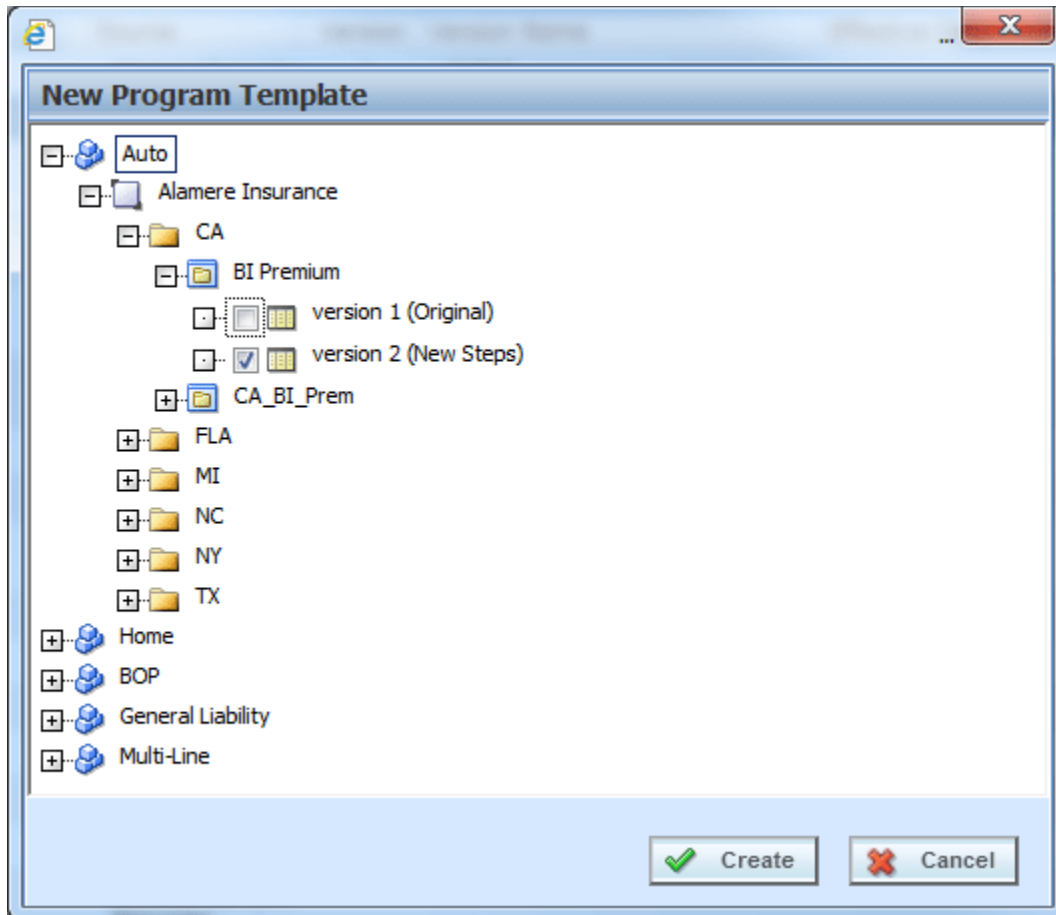


Figure 107 Applying a New Template

- Select the **Program Version** where you want to create 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.

- Click **Create**. The popup will close and the screen refreshes. Your templates will be listed.

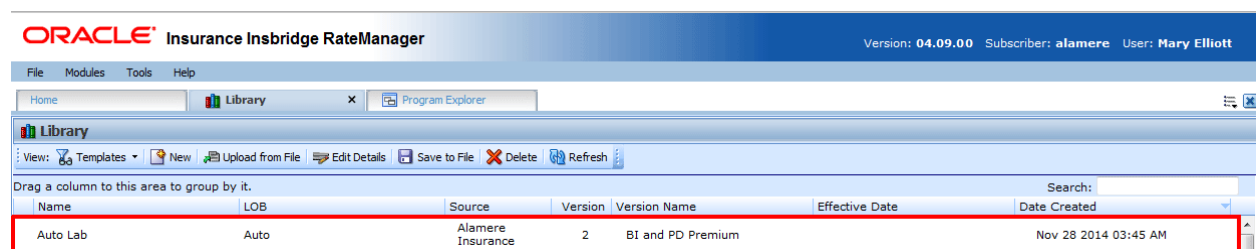



Figure 108 Populated Library

A spinning icon  indicates that the creation process is occurring. If the icon continues, please click **REFRESH** to refresh the screen.

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.*

NOTE: *The Insbridge Message Service must be running. If you receive a message that the Insbridge Message Service is turned off, please contact your system administrator to start the service. Once the service has been started, you will need to refresh the screen to view your templates.*

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

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

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

Applying a Template

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.*

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

There are two different methods of applying templates, New Program and Existing Program.

New Program

The new program method will create the project and the Programs folder. Most often you will use the new program method when the source is new to the product or the template is new to the project. 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.

Existing Program

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

Applying a Template: New Program

1. Select the **Template** you want to apply.

- Right click to get the menu. Select **Apply→New Program**. A separate window is displayed.

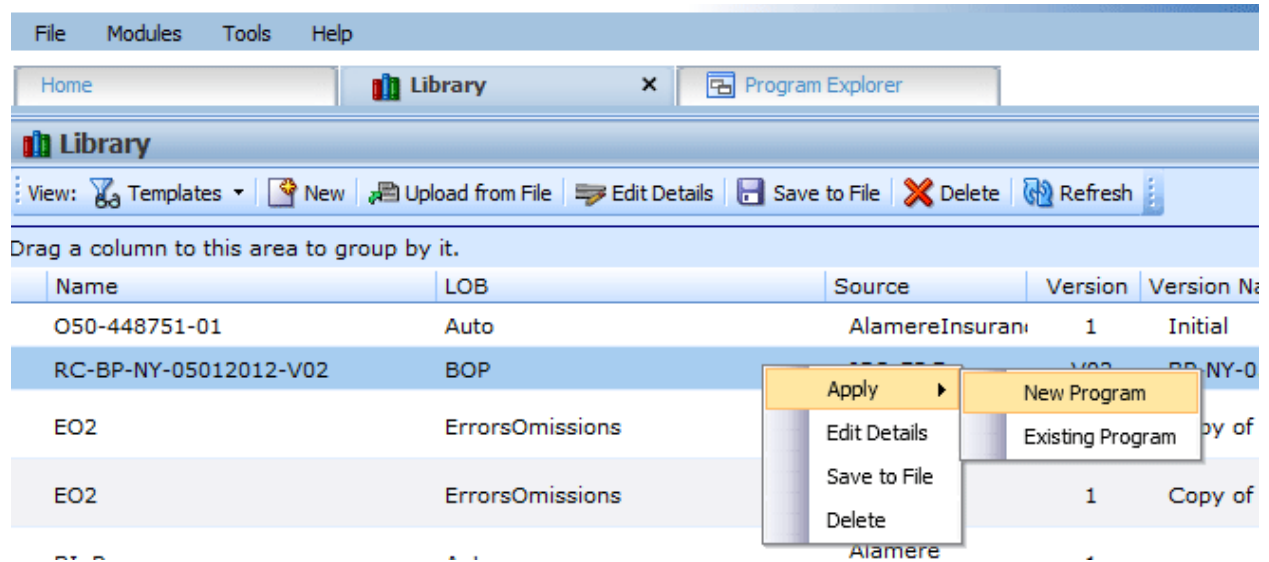


Figure 109 Applying a New Program

- Select the **Program Folder** where you want the template to be applied.

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

NOTE: Be aware, if the project 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.

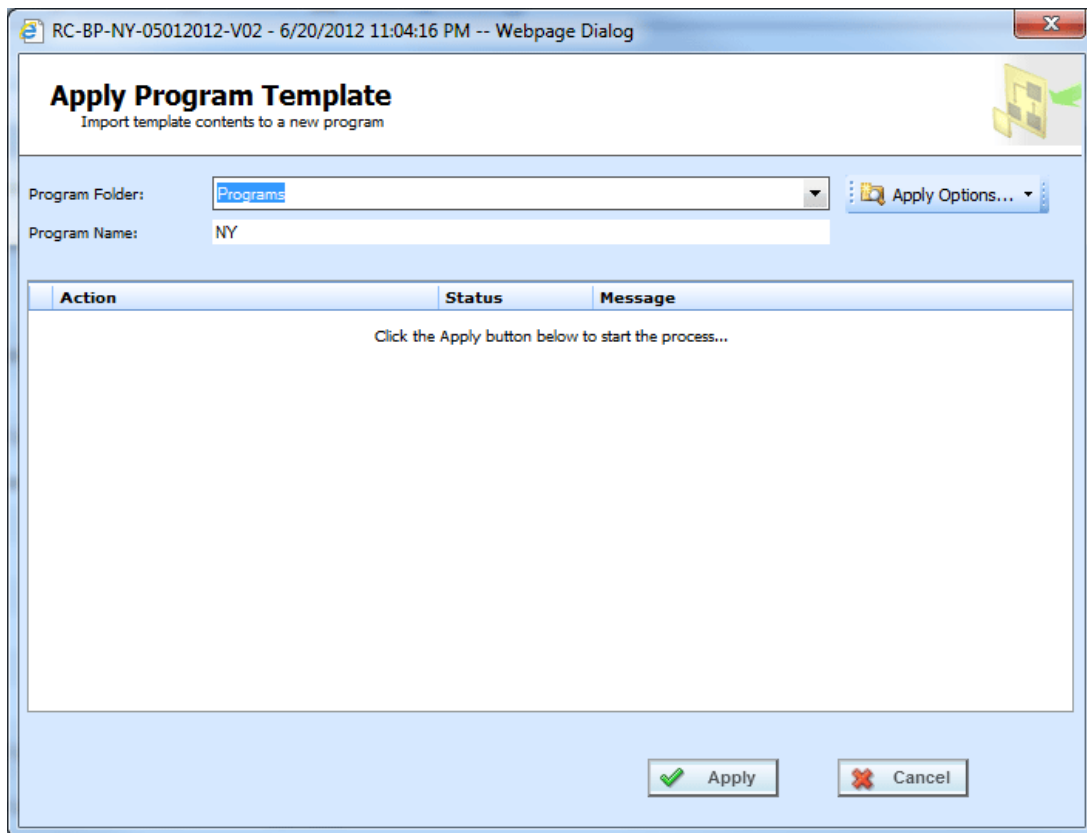


Figure 110 Selecting Program Folder

4. You can update the **Program Name**.
5. Click **Apply** to start the wizard.
6. The wizard begins. A successful apply displays a Process Complete message.

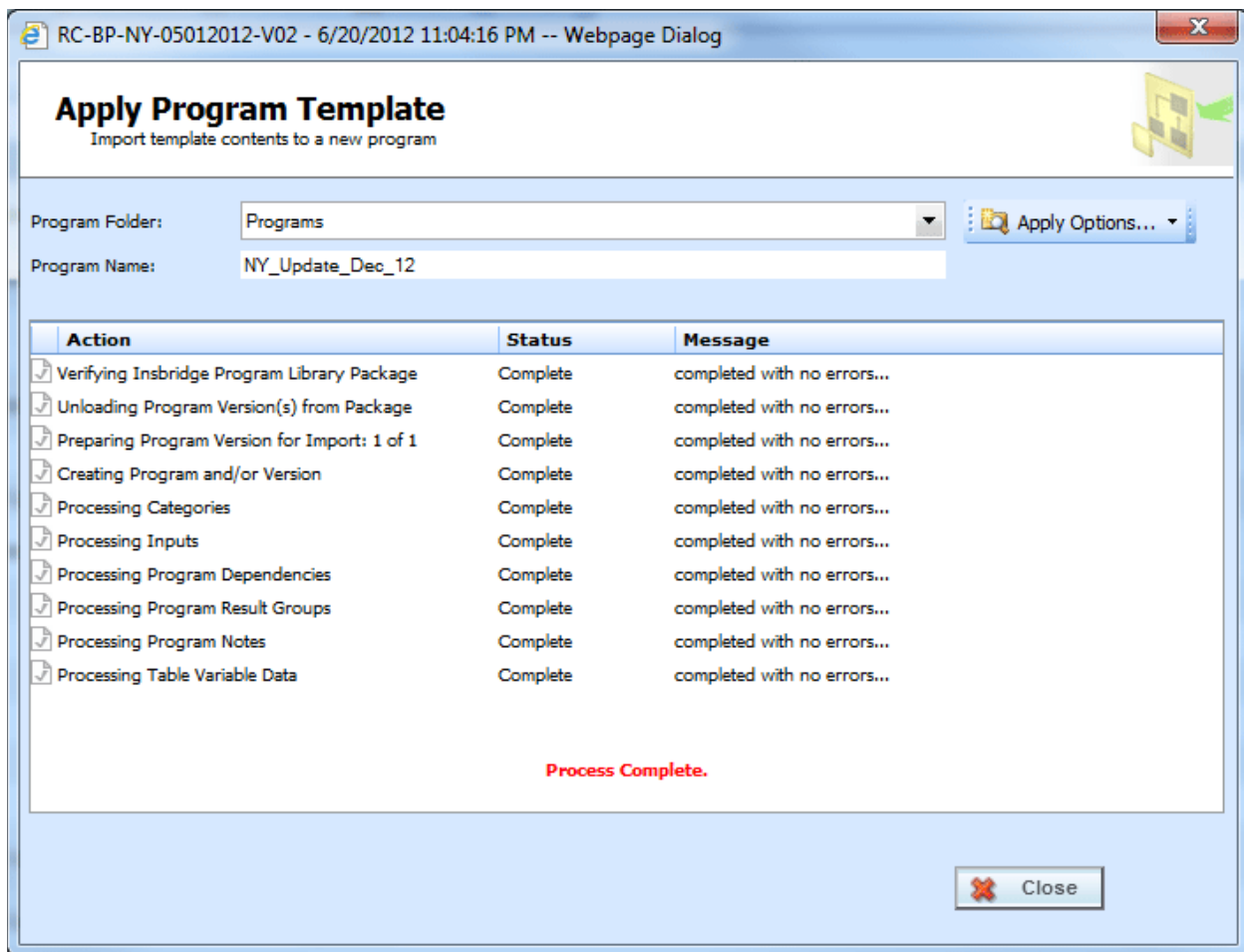


Figure 111 Applied Template

When the template has successfully been applied, a process complete message will be displayed at the bottom of the screen.

If the template is successful, the project and program folder along with the template will be displayed under the correct product.

If the template failed, a failed message will be listed. The Project 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 check at the front of the action and **Complete** status indicate **success**.
- An **X** at the front of the action and a **Failed** status indicates a **failed** template application.
- A blank status indicates that this action was not needed.

Applying a Template: Existing Program

Use the Existing Program method when applying a template to an already existing project and programs folder. This method is most commonly used to applied another version to an existing program. 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. Select the **Template** you want to apply.

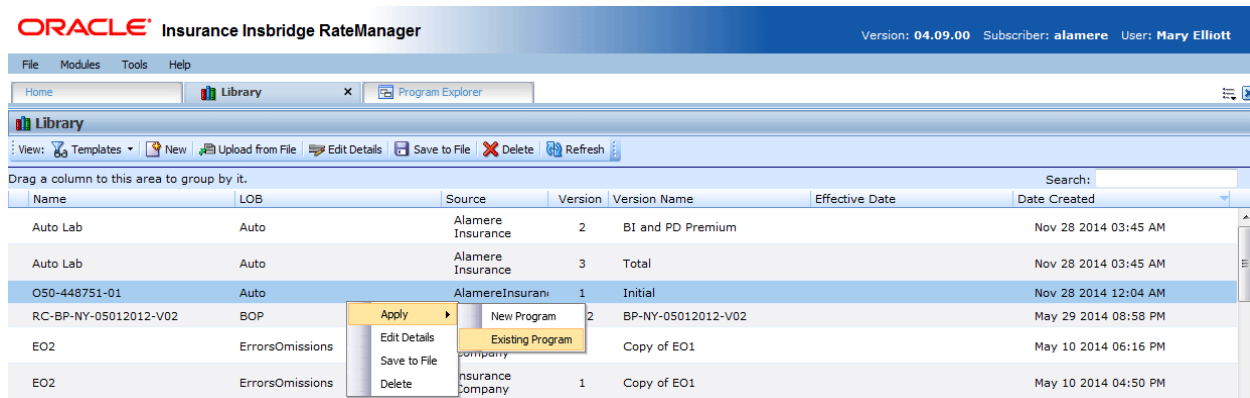


Figure 112 Applying Template to Existing Program

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

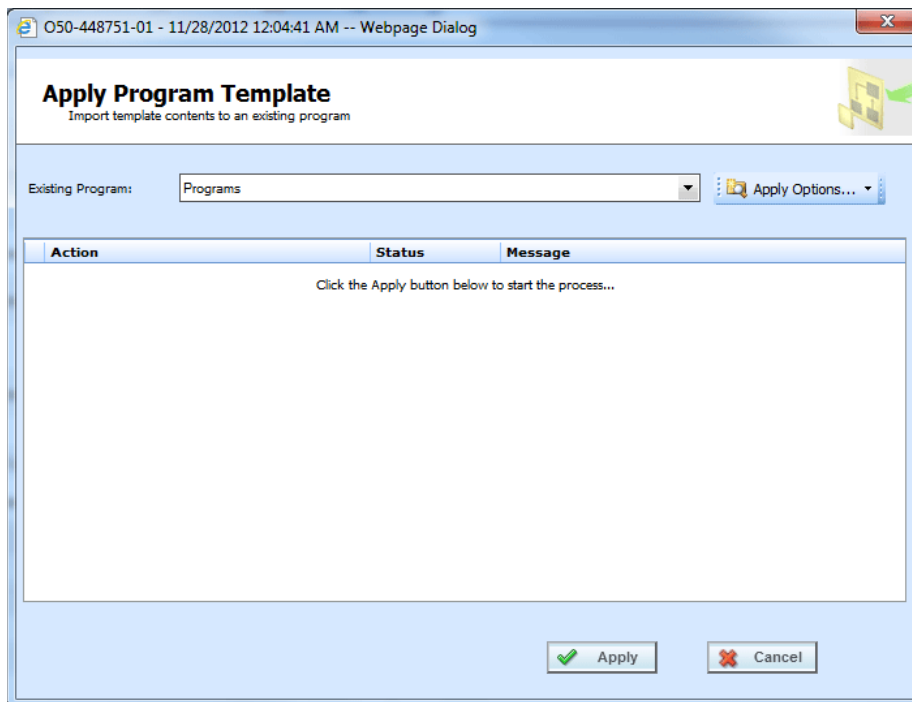


Figure 113 Applying a Template to an Existing Program

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 **Apply**. The screen lists the actions taken and success or failure.

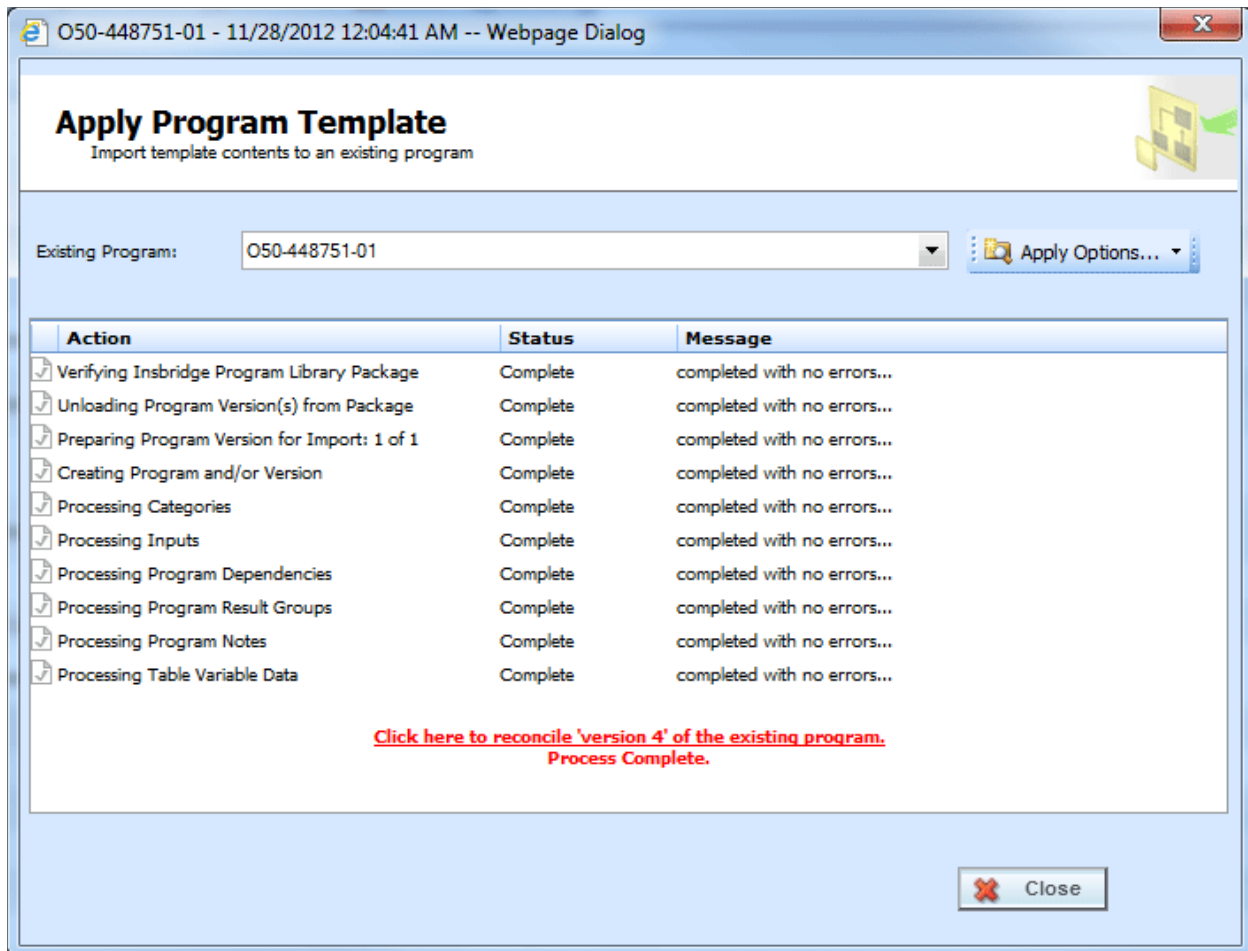


Figure 114 Successful Template Applied to an Existing Program

If the template is successful, the program will be placed in the location selected.

If the template failed, a failed message will be listed and no program will be applied. If one item fails, the template will not be created. All items must pass.

- A check at the front of the action and **Complete** status indicate **success**.
- An **X** at the front of the action and a **Failed** status indicates a **failed** template application.
- A blank status indicates that this action was not needed.

For successfully applied templates to an existing program, a link will be at the bottom of the screen that opens the Reconciliation wizard. This allows you to see the differences between this version and the previously applied version. See Reconcile for more information.

Editing a Template

Templates that you have created can be edited at any time. Templates brought in from other sources cannot be edited. If SAVE 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.
2. Click **Edit Detail** to open the Edit Template popup.

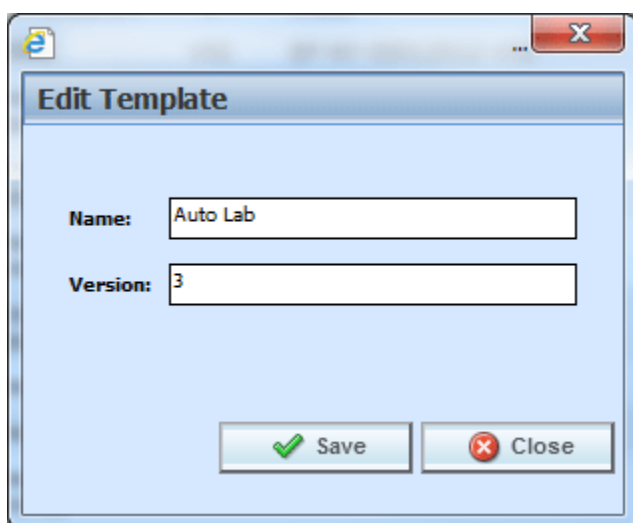


Figure 115 Editing a Template

3. You can change the **Name** and **Version**.
4. When finished, click **Save** to save your entry and close the popup.

Deleting a Template

Templates can be deleted at any time. Deleting a template from the library does not remove the template program from the project.

1. Click on the **Template(s)** you want to delete.

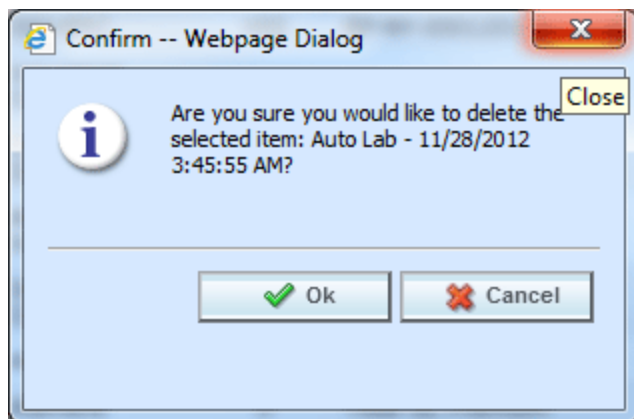


Figure 116 Deleting a Template

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

RECONCILE

The Reconcile option allows you to reconcile one program version against another. For example, when a new template is applied into a project, 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 table 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.

To Reconcile Two Templates

1. Click the link at the bottom of the Successfully Applied Template wizard. Only programs with more than one version will have this option available. This will take you to the Reconciliation wizard.



Figure 117 Reconciliation Wizard Welcome

2. 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.

3. **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.

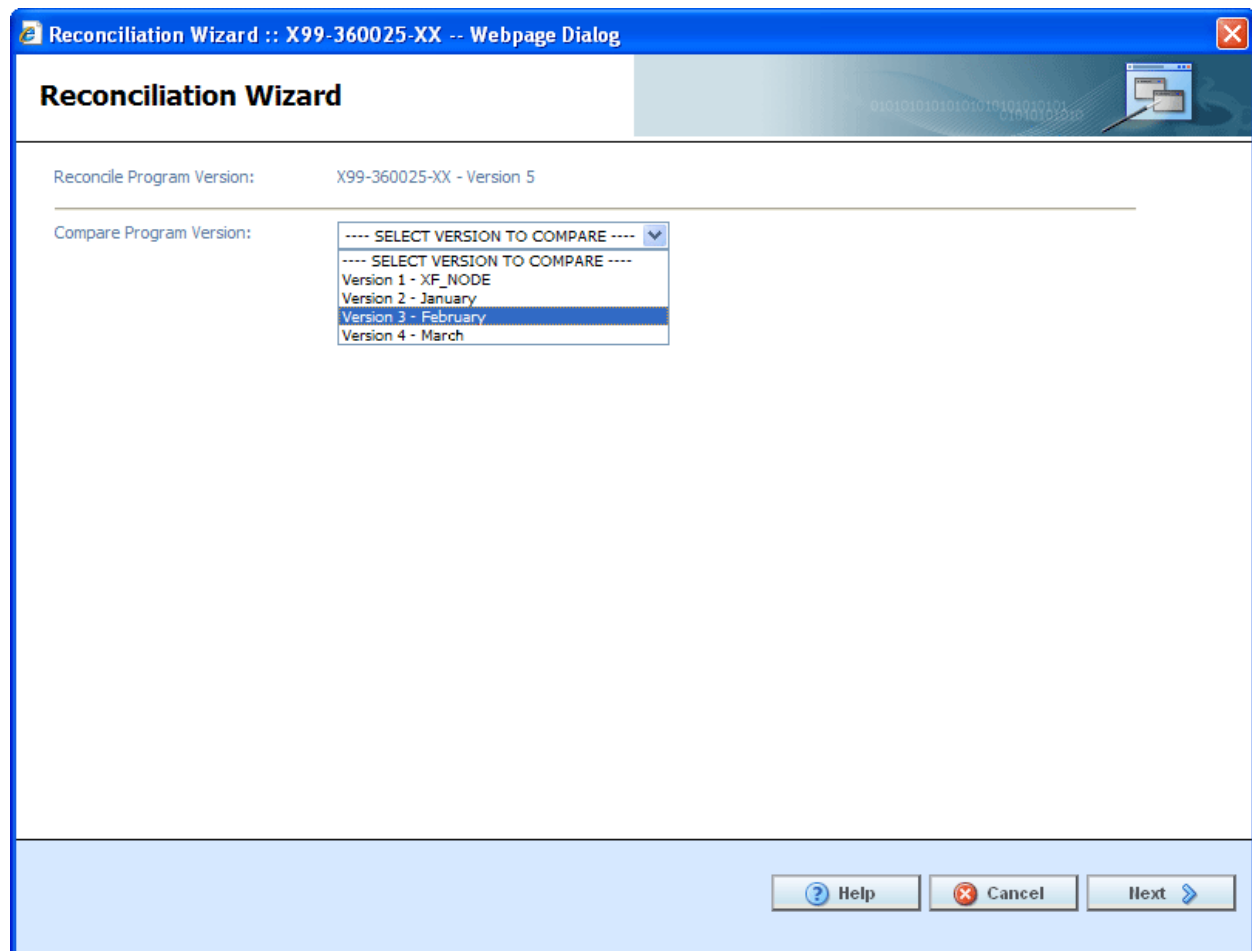


Figure 118 Selection Versions to Compare

4. 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-apply the template. It will come into the project as the next available version number.*

5. 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.

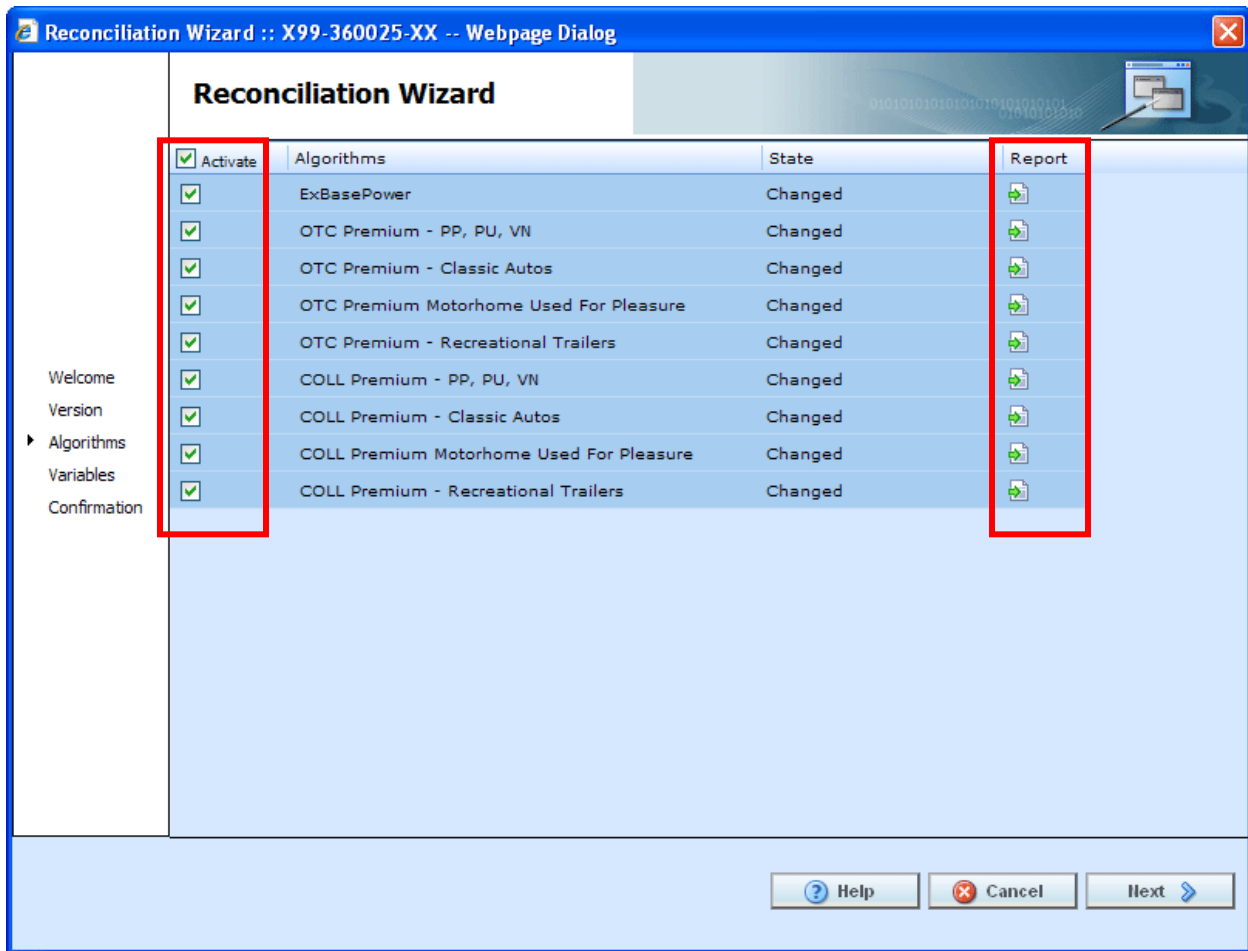


Figure 119 Reconciling Algorithms

6. 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.

- 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.

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

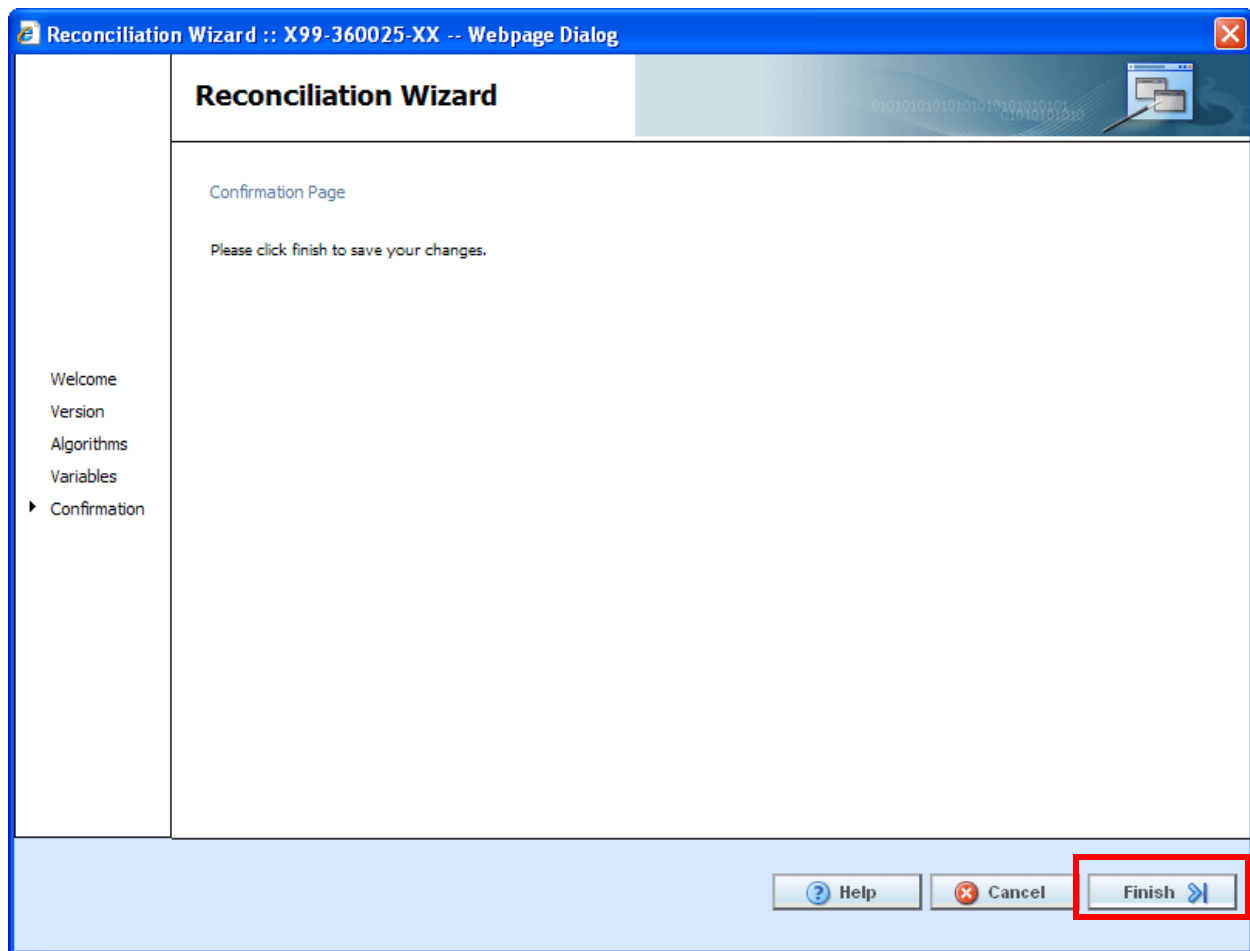


Figure 120 Confirmation of Template Reconciliation

- On the Confirmation tab, 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

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

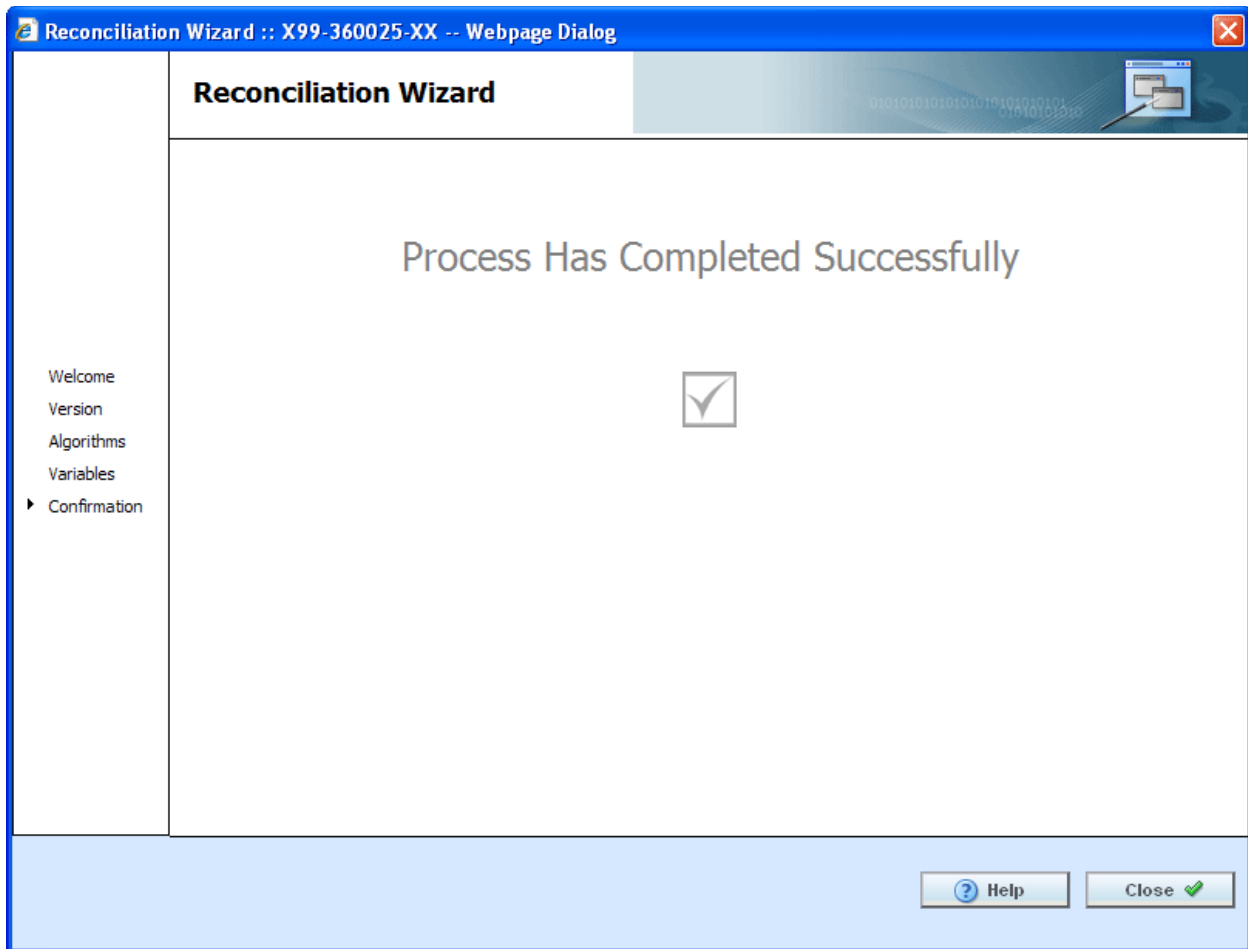


Figure 121 Successful Template Reconciliation

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

Viewing Reconcile 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.

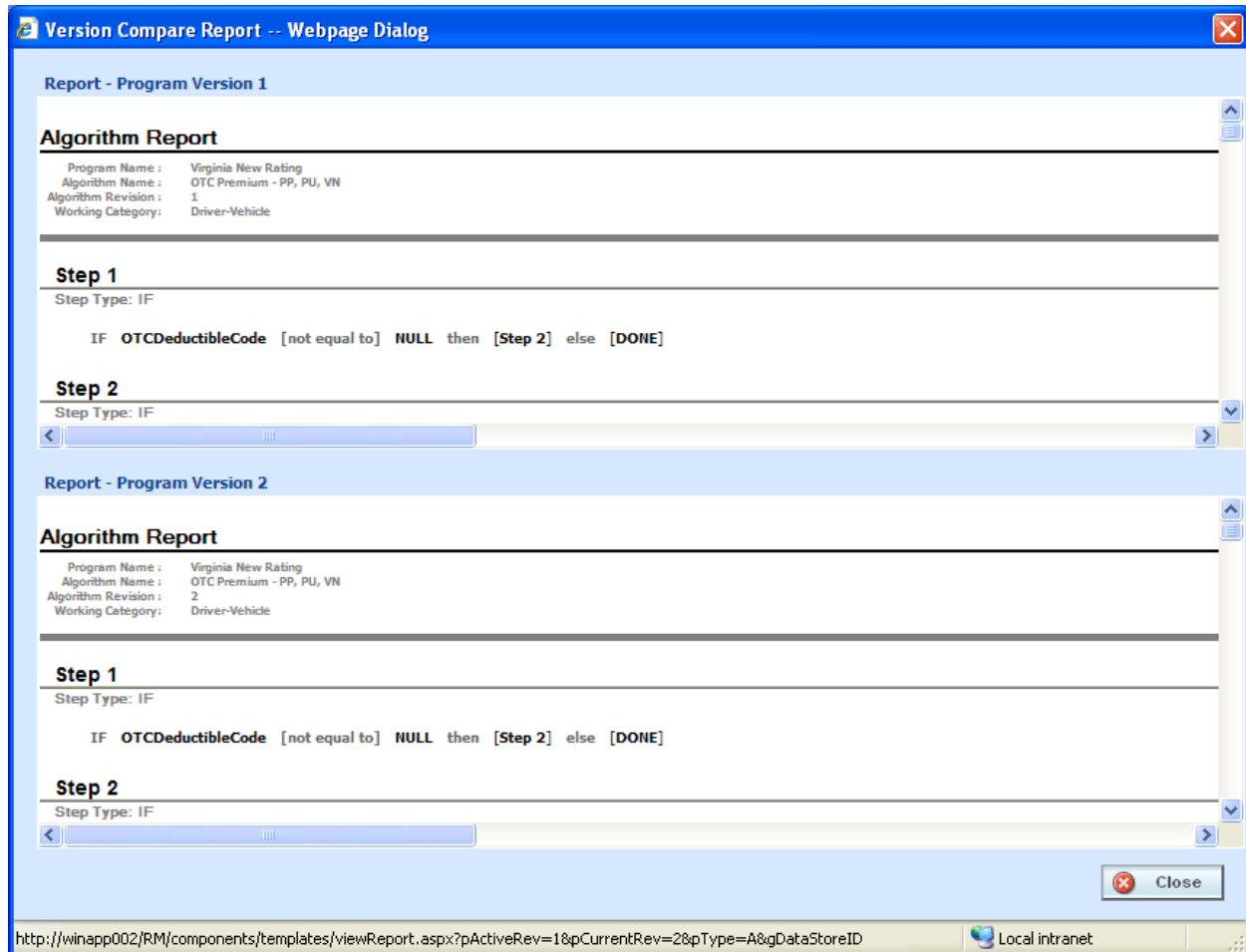


Figure 122 Version Compare Report

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

Failed Template

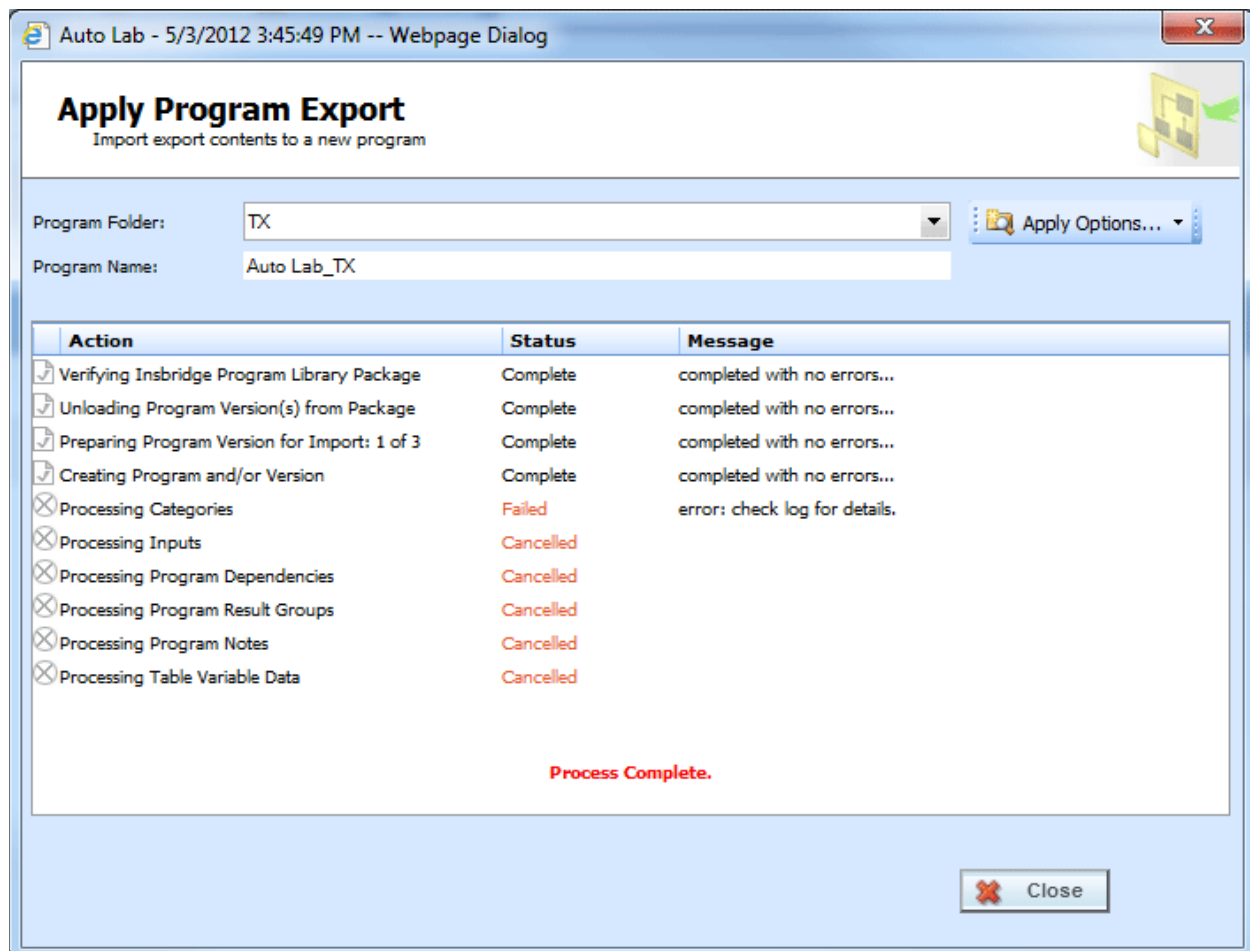


Figure 123 Failed Template

Hover your cursor over the Failed status to get the error message. A more detailed error message may be listed in IBFA→Logs→Error. Please contact your system administrator to assist with obtaining the message.

Cannot Execute SQL Command: Unable to Import Program Template.
The categories and/or inputs from the program template is not
compatible with your RateManager version: AccidentViolation (4)

Figure 124 Failed Template Message

Completed Template

When templates are added, the Program Explorer tab will have changes in the left hand side menu, under the product where you just added the template to.

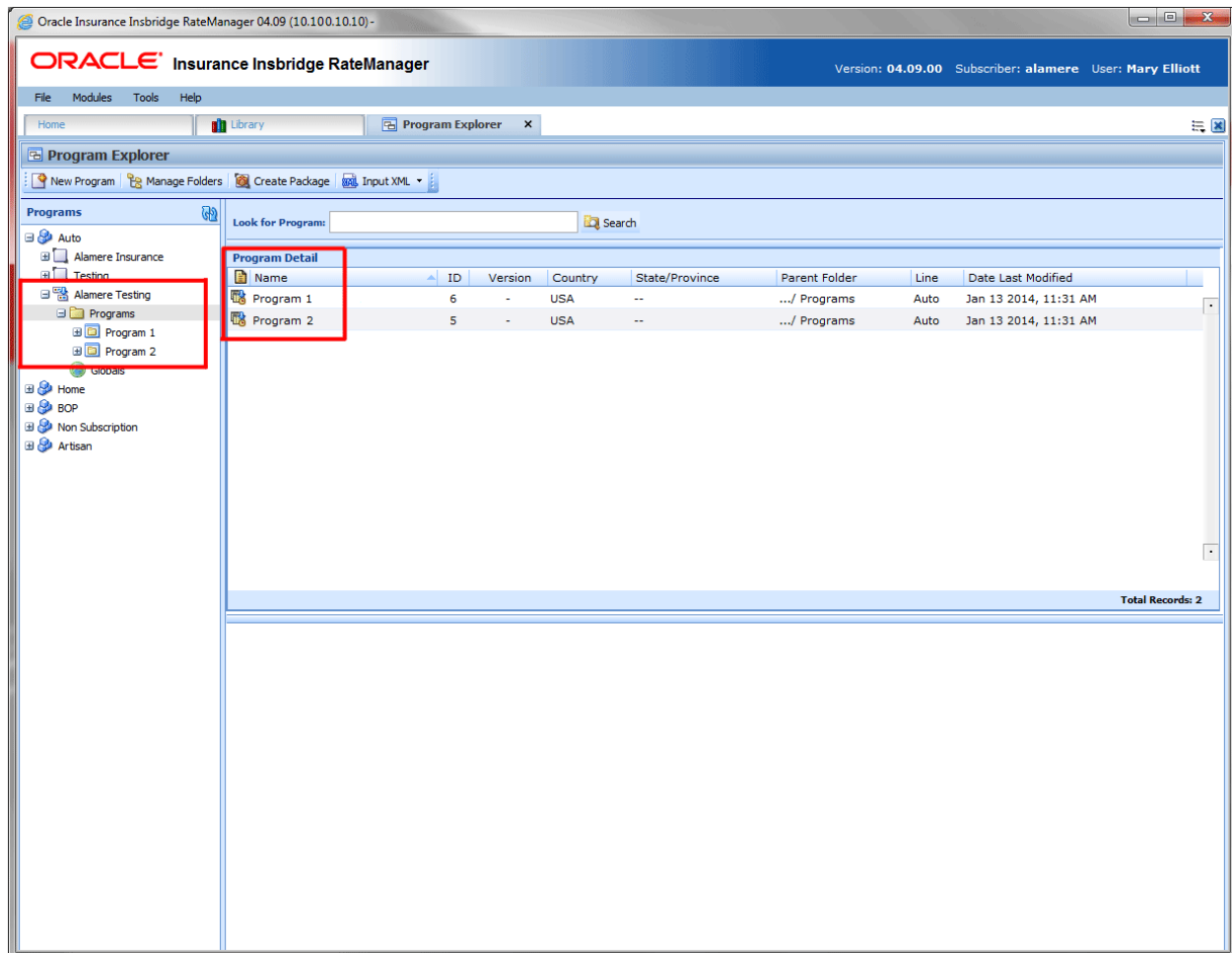




Figure 125 Applied Templates in Program Explorer

Under the product for the template, a new project will be listed. Under this project is a program folder, with the templates under that.

There are two types of programs:

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

Template Programs  – These are program versions 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.

WORKING WITH CUSTOM XML FILES

Custom XML files cannot be created on the Library tab. Custom XML files allow you to:

- Edit Custom XML File Details
- Delete a Custom XML File
- Save a Custom XML File to your local computer or network
- Upload a Custom XML File

Editing a Custom XML File

Custom XML files can be edited at any time. Custom XML files must be edited one at a time.

1. Click on the **Custom XML file** you want to edit.
2. Click **Edit Detail** to open the Edit Template popup.

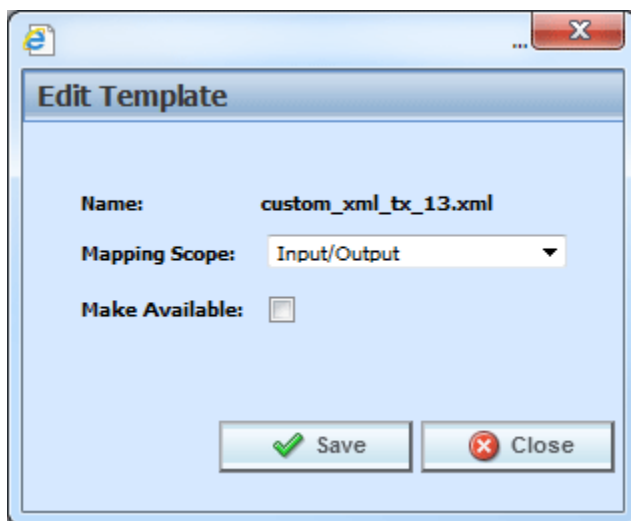


Figure 126 Editing a Template

3. You can change the **Mapping Scope** and **Make Available**, which makes the Custom XML file available to user or not.
4. When finished, click **Save** to save your entry and close the popup.

Deleting a Custom XML File

Custom XML Files can be deleted at any time. Deleting a custom XML file from the library does not remove the file from anywhere it is being used.

1. Click on the **Custom XML File(s)** you want to delete.

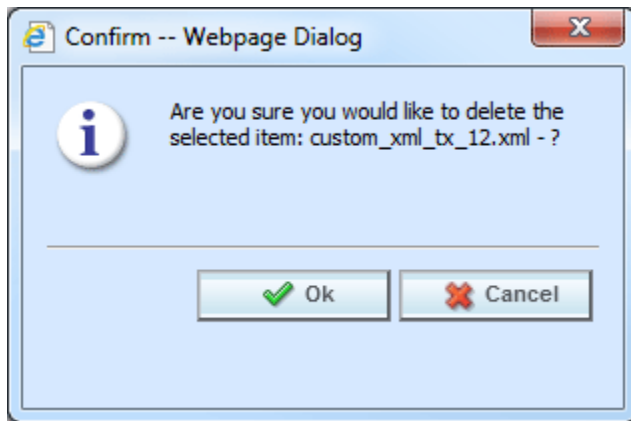


Figure 127 Deleting a Template

2. Click **Delete**. A separate screen is displayed. Select **OK** to delete the custom XML file. Click **Cancel** if this not the option you want.

WORKING WITH PUBLIC XML FILES

- Apply a Public XML File to a New Program
- Edit Public XML Details
- Delete a Public XML
- Save a Template to your local computer or network
- Upload a Template File

NOTE: *Public XML is compatible with release 4.9 and earlier.*

All references in this guide are compatible with release 4.9 and earlier.

Applying Public XML Programs

Public XML files 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 from Program Explorer and apply the correct program. Program names must be unique.

The Apply Program Export Wizard allows you to apply programs into RateManager. The applied program is placed into the same product that the program was created in.

1. Select the **Public XML File** you want to apply.
2. Click **Apply->New Program** to open the Apply Program Export wizard.

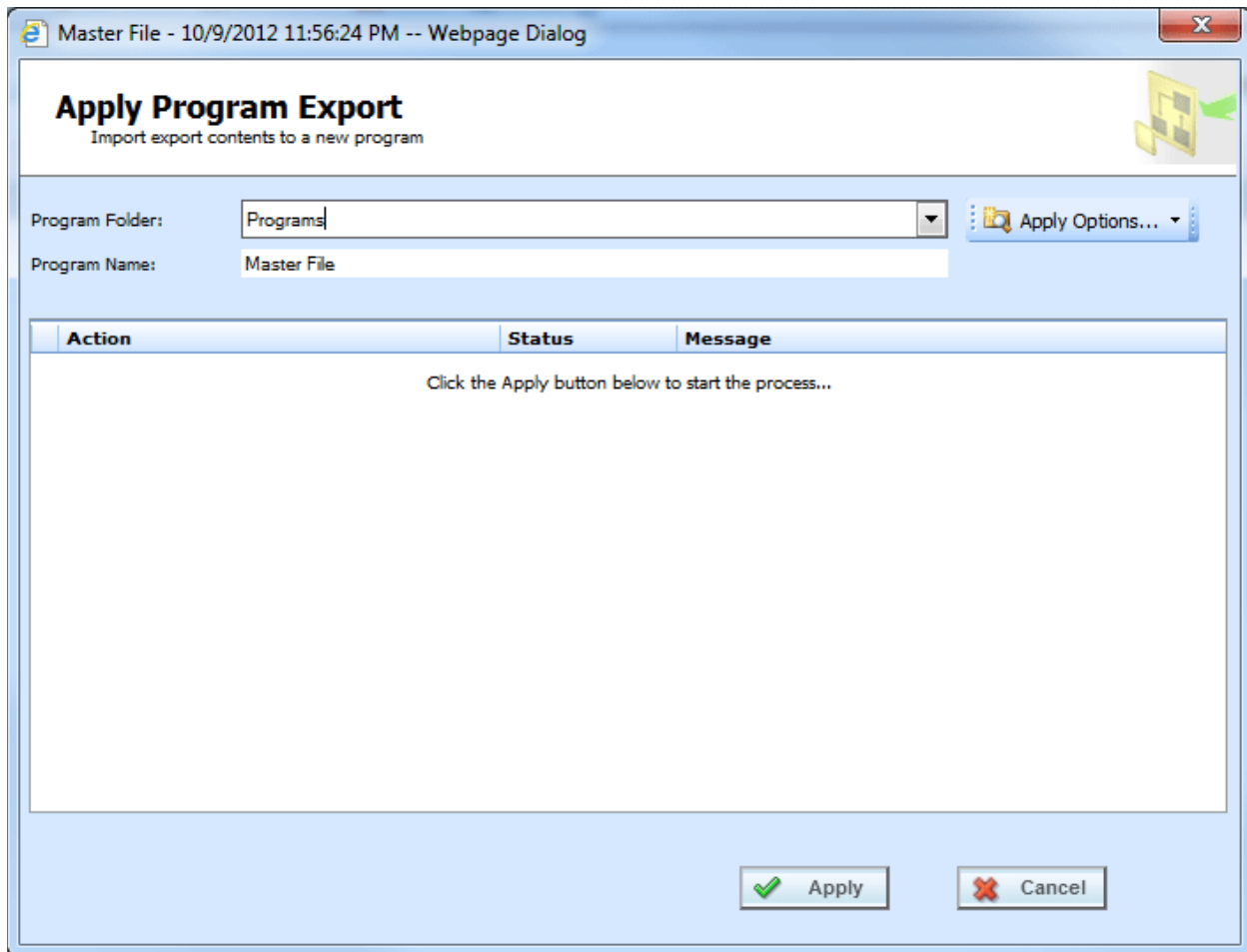


Figure 128 Apply Public XML Start

3. Select the **Program Folder** where you want the export to be applied.
4. You can update the **Program Name**.
5. Click **Apply** to start the wizard.
6. The wizard begins. A successful apply displays

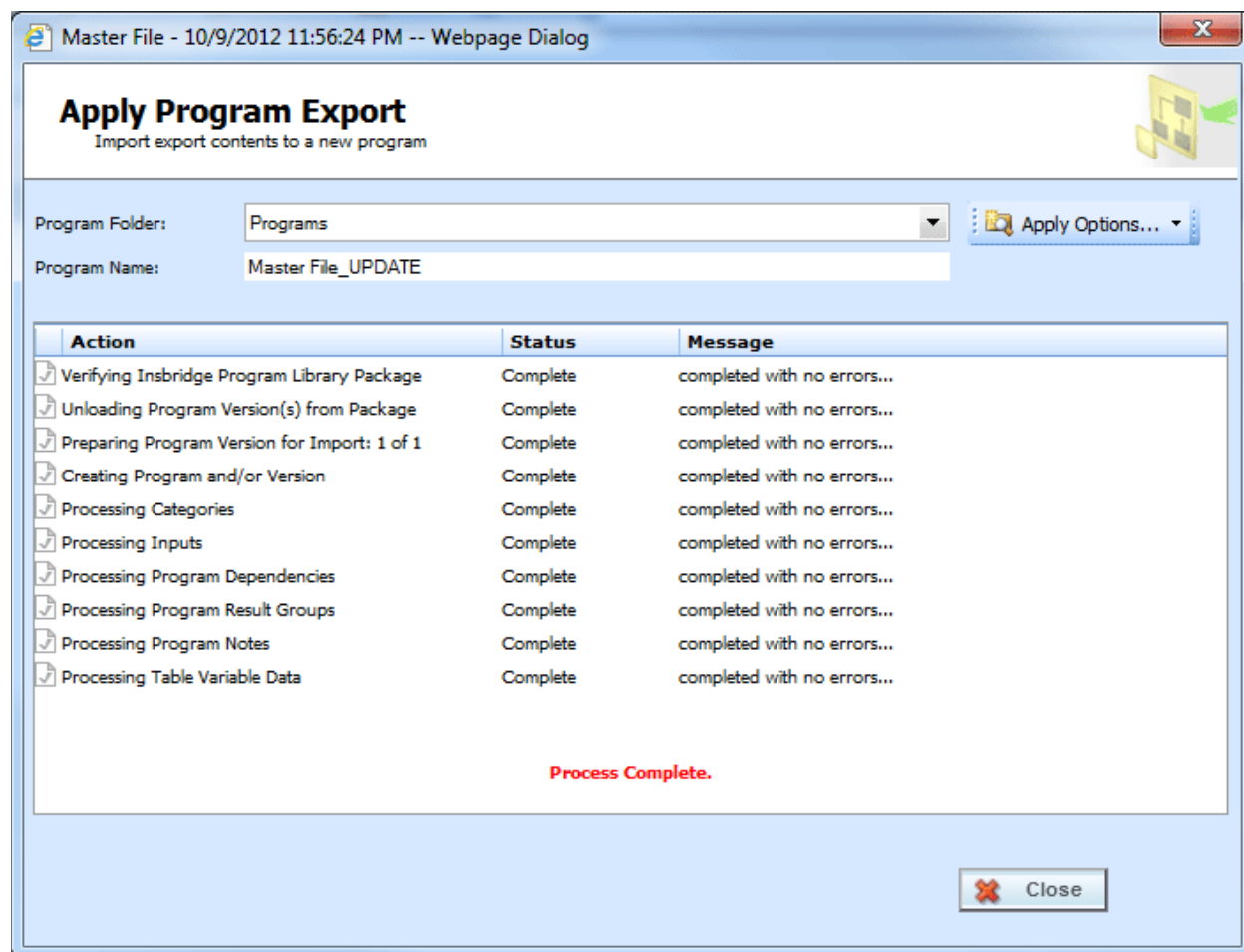


Figure 129 Apply Export Finish

If the Apply Program Export fails, a failure message will be displayed on the element that failed. Error logs are in IBFA and may require a system administrator to access.

Apply Options

If the public XML file product is not activated in the current subscriber's RateManager, the Program Folder will display *No PRODUCT found* for the Product information. You will have to select the product and add to a project before this program can be applied. If you attempt to apply a non-selected product, an error message will be displayed.

Products can be selected from the Apply Wizard. Apply Options are:

- **Select Products:** Use this option to select a product and add it to a project. This option can be used if you receive a *No PRODUCT found* error message when applying an export. Permissions are needed to select products.
- **New Project:** Use this option to create a new project. A new project can be created at any time. New projects allow globals to be unique to the project. Projects are created using a name only. Permissions are needed to create projects.

- **Manage Folders:** Allows you to create a new folder in the selected project. To create a folder, you must select the project first. New folders are created using a name only. Permissions are needed to create folders.

These options may be grayed out if you do not have permissions. If you are denied access, please contact your system administrator for permissions.

Editing a Public XML File

Public XML files can be edited at any time. Public XML must be edited one at a time.

1. Select the **Public XML File** you want to edit.
2. Click **Edit Details** to open the Edit Template popup.

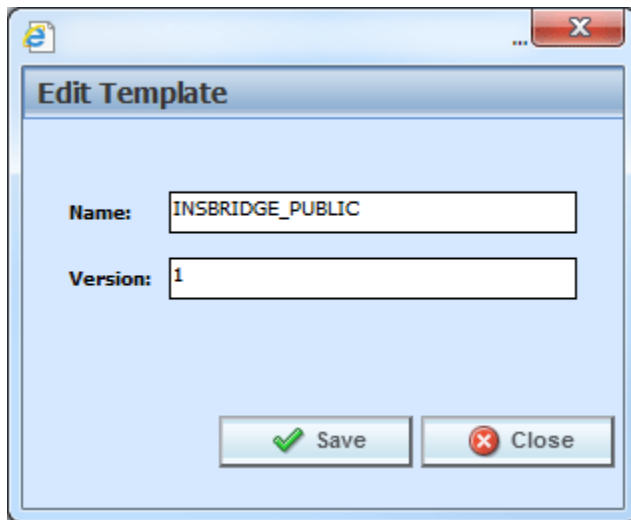


Figure 130 Editing a Public XML File

3. You can change the **Name** and the **Version**.
4. When finished, click **Save** to save your entry and close the popup.

Deleting a Public XML File

Public XML files can be deleted at any time. Deleting a public XML file from the library does not remove any applied public XML programs.

1. Select the **Public XML File(s)** you want to delete.

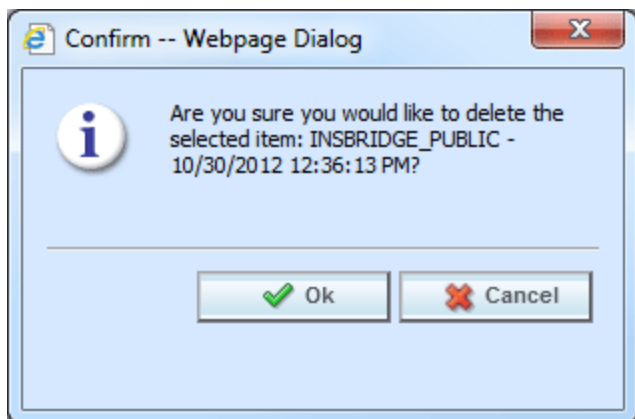


Figure 131 Deleting a Public XML File

2. Click **Delete**. A separate screen is displayed. Select **OK** to delete the export. Click **Cancel** if this not the option you want. The export will be removed immediately.

Updated Files

Files can be re-uploaded in to RateManager only if the original file is deleted from the public XML option on the Library tab or the updated file has a new name. An updated file cannot be applied to an existing program, only to a new program. This means that even though the file is updated, a new program will be created. No new program versions will be created. If you have permissions, you will have the option to create the new program in a new project.

If the file is applied to the same project as the earlier file, updates to global elements may not be recognized. If the element ID number is found in the database, the element is not updated or over-written. The element will not be updated, it will be ignored. No new element revisions or program versions will be created.

If the file is applied to a new project, then the program and elements will be created as expected.

Notice

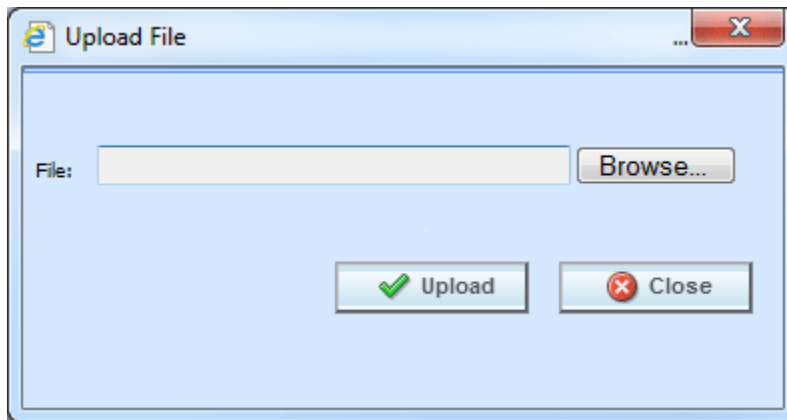
For public XML:

- Linked variables are not supported. Any linked variables will have to be manually entered.
- Driver Assignment is not supported. Any driver assignment will have to be manually entered.
- Ranking step types are not supported. Any ranking steps will have to be manually entered.
- Advanced Option –Algorithm Looping is not supported. Any advanced option-algorithm looping will have to be manually entered.

UPLOAD FROM FILE

Upload from File allows you to bring a program, template, or file that you have saved on your local drive or network into the library. Files must be uploaded one at a time.

1. Select the option where you want to work. This determines the file type that can be uploaded.
2. Click on **Upload from File**. A separate popup window is displayed.



3. Click **Browse...**, this pulls up your computers dialog box.

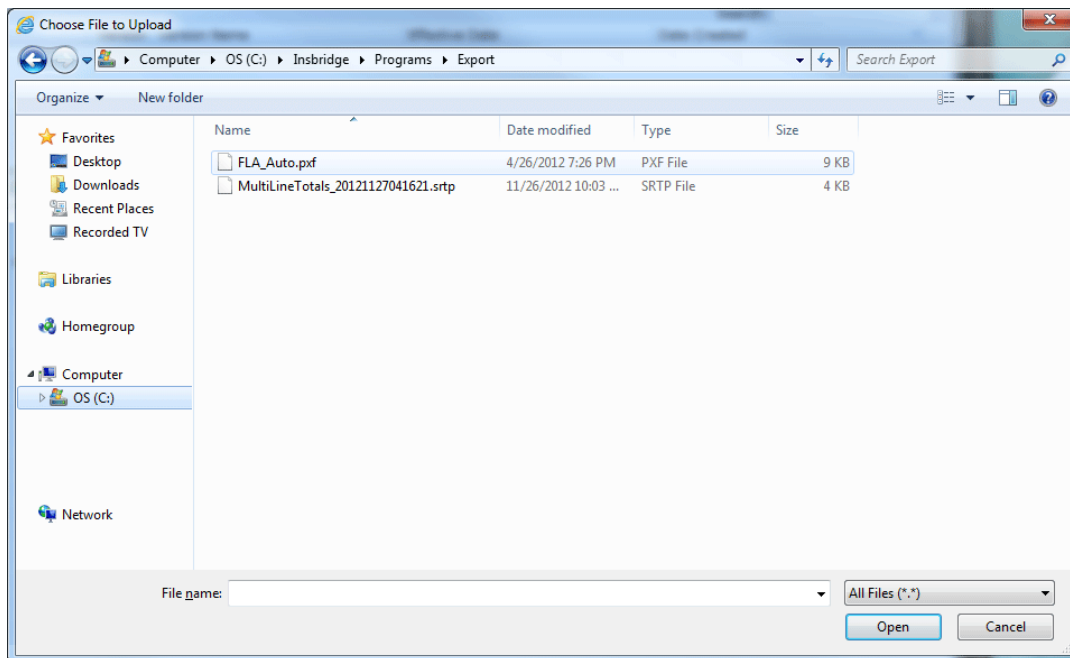


Figure 132 Selecting a Template File to Download

4. Find your file and click **Open**. This closes the dialog box and returns you to the previous popup.
5. Click **Upload** to upload the file into your library. If this is not the action you want to take, click **Close**. If the upload is successful, the file will be displayed in the library with the original file name. If the upload fails, an error message will be displayed.

Allowable File Extensions

- Export files and templates must be .srtp extensions.
- Custom XML files must be .xml extensions.
- Public XML files must be .zip extensions.

Uploading Templates

Be aware, the template file name that you upload 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 Save to File.

Uploading Public XML Files

Zip files are the only file type that will be accepted for public XML. The zip file can use any name format. Once uploaded, the name of the file listed on the Library tab is the name of the zip file. This file name can be edited.

File names must be unique across all products and projects. For example, if a zip file for the AUTO PRODUCT is named 'oct_2015' then a zip file for the HOME PRODUCT cannot also be named 'oct_2015'. Make zip file names unique. The AUTO PRODUCT could be named 'auto_oct_2015_v1.2' and the HOME PRODUCT could be named 'home_oct_2015_v1.6'. Prior to uploading, make sure the name is unique.

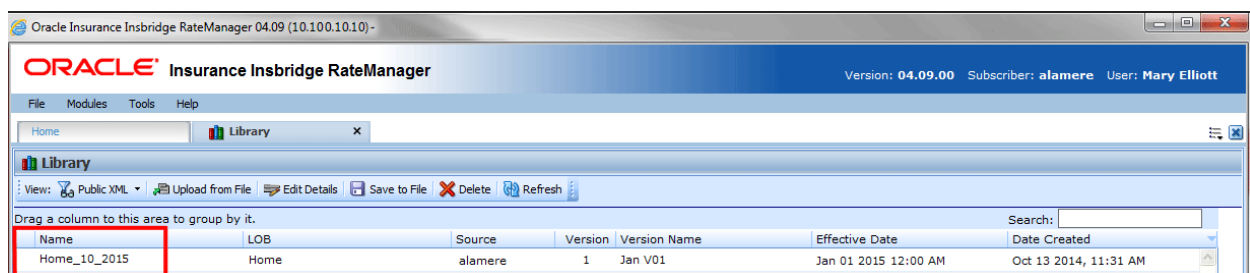


Figure 133 Public XML Files

Changing Views

If you attempt to upload a file type that is not allowed on the view where you are currently located, a message will be displayed. Click **OK** to change to the correct view.

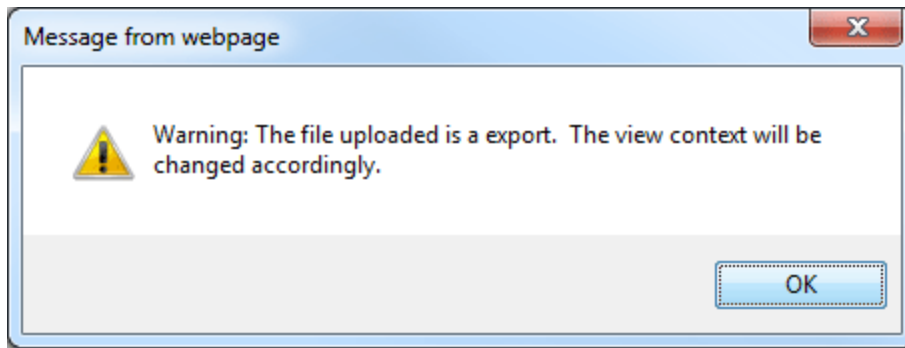


Figure 134 Change View

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 export, template, custom XML or public XML file you want to save to your local computer or network drive.
2. Click **Save to File**. Depending on the version if IE you are running, a separate popup window may be displayed or a banner may be displayed at the bottom of the screen. Select **Save As** to save your file. Click **Cancel** if this not the option you want.
3. Your computers dialog box will be displayed. Select the location where you want to save the template. Click **Save**.

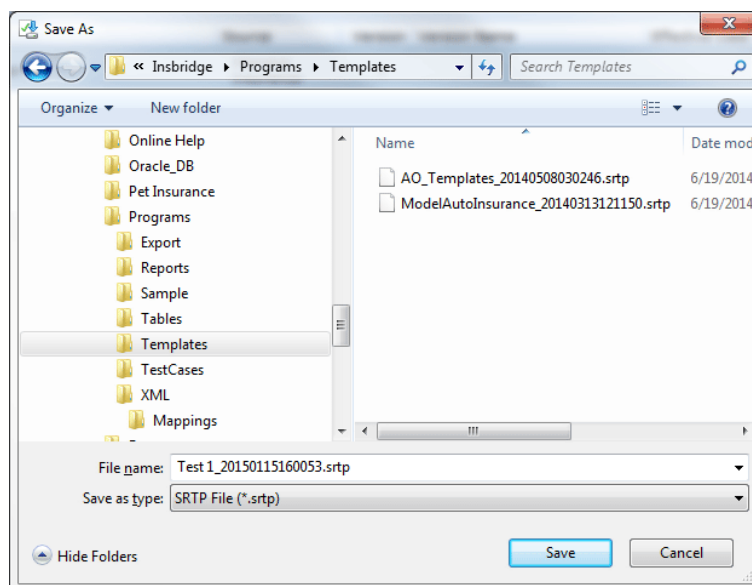


Figure 135 Selecting a Save Location

4. When the download is complete you may have the option to Open, Open Folder, Close, or View Downloads. 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.*

Saving Templates

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-Version3-8-2010.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-Version3-8-2010.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 EDIT DETAIL to change the name to what you need.

Template Naming Conventions

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)

TABLE EXPORTS

Table Export jobs are listed on the Library tab. The Library can be accessed from the library icon or the library menu option.

To View Table Exports

1. On the Library menu bar, select Table Exports for the view.

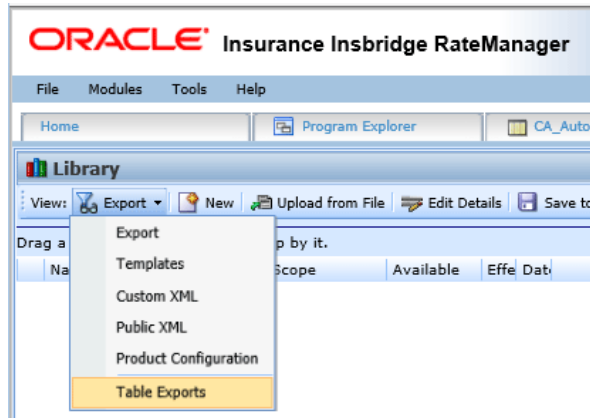


Figure 136 Selecting Table Exports on the Library

2. The screen refreshes with a listing of table export jobs. The list consists of Excel files and table variable names along with additional information to identify the file.

Name	Product	Job Name	Variable Name	Version	Domain	Project	Program	Category	Status
Criminal Count.xlsx	Auto	Auto 11-20-2...	Criminal Count	1	Alamere	Personal	CA_Auto_1	Criminal	Failed
Driver Variable Factor.xlsx	Auto	Auto 11-25-2...	Driver Variable Factor	1	Alamere	Personal	CA_Auto_1	Driver	Submitted
Total Criminal Counts Local.xlsx	Auto	Auto 11-20-2...	Total Criminal Counts...	1	Alamere	Personal	CA_Auto_1	Criminal	Success
AccidentBase.xlsx	Auto	Auto 11-25-2...	AccidentBaseRate	3	Alamere	Personal	CA_Auto_1	Policy	Submitted
Comprehensive.xlsx	Auto	Auto 11-20-2...	Comprehensive	1	Alamere	Personal	CA_Auto_1	Policy	Success
DeductibleFact.xlsx	Auto	Auto 11-25-2...	DeductibleFact	3	Alamere	Personal	CA_Auto_1	Driver	Saved
ThirdPartyLiab.xlsx	Auto	Auto 11-20-2...	ThirdPartyLiab	2	Alamere	Personal	CA_Auto_1	Policy	Success

Figure 137 Table Exports on the Library Tab

Files Listed

When multiple tables are submitted in a job, multiple workbooks are returned. Each table is presented on a separate workbook. The information on the Library listing page can help to identify the file you want. There are 10 fields:

Name – The name of the Excel file. The default name is the table variable name but can be changed. This is the Destination Workbook name used when the export was created.

Product – The product LOB where the table variable is located.

Job Name – The job name of the user created job found on the Table Job Management tab or the name assigned by the system export. System exports are named Auto followed by the date.

Variable Name – The name of the table variable selected.

Version – The version of the table variable selected.

Domain – the domain where the table variable is located.

Project – the project where the table variable is located.

Program – the program where the table variable is located.

Category – the category of the table variable.

Status – the status of the table export job.

File Status

Files listed on the Library tab may or may not be available. The status can help you determine if the file should be available. There are 5 statuses for Table Exports:

- **Saved** – a new job. This job may or may not have been run. When a table variable is saved to a job, the file may be listed on the Library tab but is not yet available.
- **Submitted** – a job that has been submitted for processing. The file may be listed on the Library tab but is not yet available.
- **Executing** – a job that is currently being processed. The file may be listed on the Library tab but is not yet available.
- **Success** – a completed job. The Excel file can now be downloaded from the Library tab.
- **Failed** – the job failed for some reason. The file may be listed on the Library tab but is not available.

If the status is saved, and you have permissions, you can return to the Table Job Management tab and start the job. If you do not have permissions, contact your system administrator to start the job.

Files in Success status are the most likely to be available.

Downloading a File

The files listed can be downloaded and saved to your local drive or network or opened in Microsoft Excel on your computer. You cannot open the file to view or edit inside of RateManager.

1. Select the file you want to view or edit.
2. Right click and select to Save to File or click the Save to File button in the top bar menu.
3. The file can be saved to your local hard drive or network drive or opened in Excel.
4. If you want to download the file, the download displays a success or fail message when completed.
5. If you want to open the file immediately, the file will open in Excel. The file is not automatically saved. You must save it in Excel.

File Not Found

When you attempt to Save to File and that file is not available, you will receive a message that the file cannot be found. You can select to look for a file on the server.

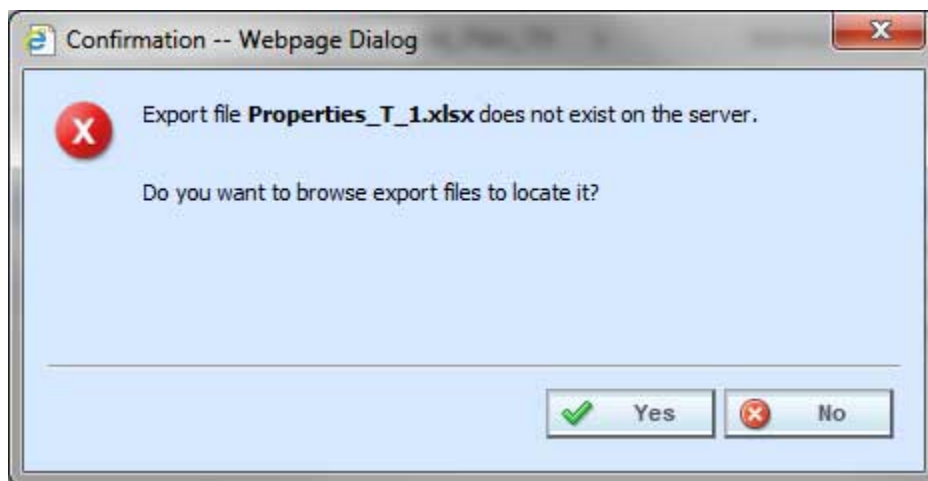


Figure 138 Browse for File

A separate screen lists the files found on the Shared Workfiles location. Look at the Date Modified to verify this is the file you want. An older version of the file may be on the server.

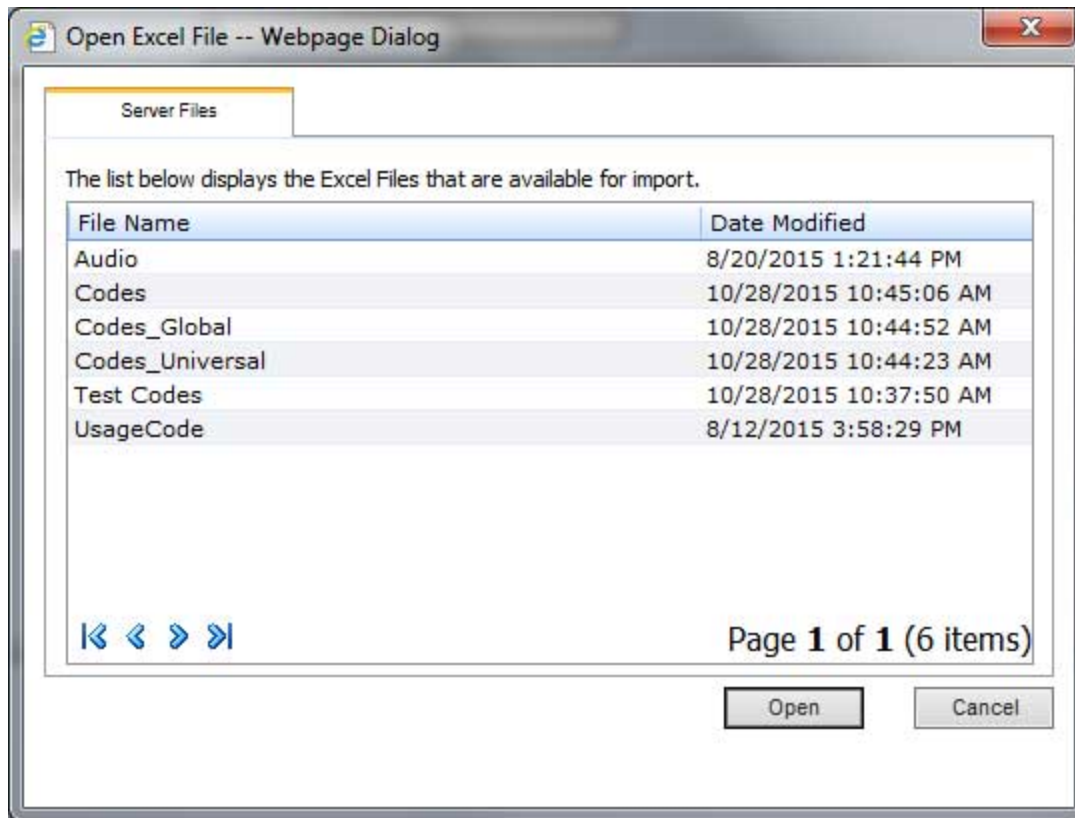


Figure 139 Table Exports Saved on the Server

Select the file you want and click Open. If you do not want any of these files, click cancel.

If the file you want is not found, you can export the file again. If the file still does not present, the system administrator may need to verify the shared location is available or check the IBSS error logs.

Files are deleted from the listing if the job is deleted from Table Job Management.

Files in saved, submitted, executing and failed status often are not found.

EDITING A FILE

Excel files that are immediately opened can be viewed and edited but are not automatically saved. If you want to save the file, you must save it in Excel. The downloaded file may need to have editing enabled.

	A	B	C	D	E	F	G	H	I	J
2	BI	PD	COMP	COLL	Model Year	Model Year				
3	Mask = false	Reserved	Reserved	Reserved	Reserved	Reserved				
4	Wildcard = false	Reserved	Reserved	Reserved	Reserved	Reserved				
5	Interpolate = false	Reserved	Reserved	Reserved	Reserved	Reserved				
6	Field	Reserved	Reserved	Reserved	Reserved	Reserved				
7	Policy	Vehicle	Vehicle	Vehicle	Vehicle	Vehicle				
8	Decimal	Decimal	Decimal	Decimal	Integer	Integer				
9	Operator: =	Default: 0	Default: 0	Default: 0	Default: 0	Default: 0				
10	1	1	1.22	1.24	2014	2014				
11	1	1	1.22	1.24	2013	2013				
12	0.99	1.03	1.22	1.23	2012	2012				
13	0.99	1.03	1.22	1.22	2011	2011				
14	0.98	1.02	1.22	1.16	2010	2010				
15	0.98	1.02	1.22	1.1	2009	2009				
16	0.97	1.02	1.22	1.05	2008	2008				
17	0.96	1.02	1.22	1	2007	2007				
18	0.96	1.01	1.22	0.95	2006	2006				
19	0.96	1.01	1.22	0.9	2005	2005				
20	0.96	1.01	1.22	0.87	2004	2004				
21	0.96	1.01	1.22	0.84	2003	2003				
22	0.9	1.01	1.22	0.81	2002	2002				
23	0.9	1.01	1.22	0.77	2001	2001				
24	0.9	1.01	1.22	0.73	2000	2000				
25	0.9	1.01	1.22	0.7	1999	1999				
26	0.9	1.01	1.22	0.66	1998	1998				
27	0.9	1.01	1.22	0.64	1997	1997				
28	0.88	0.99	1.22	0.62	1996	1990				
29	0.7	0.79	1.22	0.62	1989	1980				

Figure 140 Exported Table in Excel

Table Composition

When the file is opened, the file can be edited as needed. The light blue columns on the left are the criteria and the dark blue columns are the table variable and linked table variables, if applicable.

The rows under the criteria and table variables are the current values.

Criteria Definition

Criteria definitions start in Column A, Row 2 (A2). All criteria are listed. The end of the criteria list depends on the number of criteria that are defined in the table. The maximum number of criteria allowed in a table variable is 50.

Row	Contents	Notes
2	TableCriteria Name	The name of the variable that defines the criteria values
3	Mask =	Masking applies - 'true' or 'false'
4	Wildcard =	Wildcarding applies - 'true' or 'false'
4	Interpolate =	Interpolation applies - 'true' or 'false'
6	VarType	The type of variable that defines the criteria values <ul style="list-style-type: none"> • Fields • CalcVar • TableVar
7	Category	The category of the variable that defines the criteria values
8	DataType	The data type enforced for the values stored <ul style="list-style-type: none"> • Integer • String • Decimal • Date
9	Operator	The operator used to determine whether the incoming data match is 'true' or 'false' <ul style="list-style-type: none"> • [=] equals • [<>] not equals • [>] greater than • [<] less than • [>=] greater than or equal to • [<=] less than or equal

Figure 141 Criteria Definitions for Exported Table Variables

True = the option is on the table variable criteria

False = the option is not on the table variable criteria

Table Identifiers & Results (Table) Definition

The table variable definition start column depends on the number of criteria defined in the table. There is a maximum number of criteria is 50, column AY. The last column used depends on the number of linked table variables defined.

Row	Contents	Notes
2	TableVar	The name of the table variable (or linked table variable) that defines the result values in this column
3	TableID1	Reserved
4	TableID2	Reserved
5	TableID3	Reserved
6	TableID4	Reserved

Row	Contents	Notes
7	Category	The category of the variable that defines the result and table values
8	DataType	The data type enforced for the values stored <ul style="list-style-type: none"> • Integer • String • Decimal • Date
9	Default: n	Then default value that is used at runtime if no matching criteria row is found

Figure 142 Table Identifiers and Results Definitions

Table Data

Table data begins at row 10. The number of rows used depends on the amount of data in the table. All data is current for the revision selected to be exported.

Row	Column	Notes
10	A	The beginning of the table data values

Figure 143 Table Data Definitions

All exported tables use a system-defined format with row 1 being used for system defined properties. The export format cannot be modified and exported tables cannot be imported back in to RateManager at this time

CONTACTING SUPPORT

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

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Address any additional inquiries to:

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oracle.com

COUNTRY CODES

NAME	ABBR
AFGHANISTAN	AFG
ALBANIA	ALB
ALGERIA	DZA
AMERICAN SAMOA	ASM
ANDORRA	AND
ANGOLA	AGO
ANGUILLA	AIA
ANTARCTICA	ATA
ANTIGUA AND BARBUDA	ATG
ARGENTINA	ARG
ARMENIA	ARM
ARUBA	ABW
AUSTRALIA	AUS
AUSTRIA	AUT
AZERBAIJAN	AZE
BAHAMAS	BHS
BAHRAIN	BHR
BANGLADESH	BGD
BARBADOS	BRB
BELARUS	BLR
BELGIUM	BEL
BELIZE	BLZ
BENIN	BEN
BERMUDA	BMU
BHUTAN	BTN
BOLIVIA	BOL
BOSNIA AND HERZEGOWINA	BIH
BOTSWANA	BWA
BOUVET ISLAND	BVT
BRAZIL	BRA
BRITISH INDIAN OCEAN TERRITORY	IOT
BRUNEI DARUSSALAM	BRN
BULGARIA	BGR
BURKINA FASO	BFA
BURUNDI	BDI

NAME	ABBR
CAMBODIA	KHM
CAMEROON	CMR
CANADA	CAN
CAPE VERDE	CPV
CAYMAN ISLANDS	CYM
CENTRAL AFRICAN REPUBLIC	CAF
CHAD	TCD
CHILE	CHL
CHINA	CHN
CHRISTMAS ISLAND	CXR
COCOS (KEELING) ISLANDS	CCK
COLOMBIA	COL
COMOROS	COM
CONGO	COG
COOK ISLANDS	COK
COSTA RICA	CRI
COTE D'IVOIRE	CIV
CROATIA (local name: Hrvatska)	HRV
CUBA	CUB
CYPRUS	CYP
CZECH REPUBLIC	CZE
DENMARK	DNK
DJIBOUTI	DJI
DOMINICA	DMA
DOMINICAN REPUBLIC	DOM
EAST TIMOR	TMP
ECUADOR	ECU
EGYPT	EGY
EL SALVADOR	SLV
EQUATORIAL GUINEA	GNQ
ERITREA	ERI
ESTONIA	EST
ETHIOPIA	ETH
FALKLAND ISLANDS (MALVINAS)	FLK
FAROE ISLANDS	FRO
FIJI	FJI
FINLAND	FIN
FRANCE	FRA
FRANCE, METROPOLITAN	FXX
FRENCH GUIANA	GUF

NAME	ABBR
FRENCH POLYNESIA	PYF
FRENCH SOUTHERN TERRITORIES	ATF
GABON	GAB
GAMBIA	GMB
GEORGIA	GEO
GERMANY	DEU
GHANA	GHA
GIBRALTAR	GIB
GREECE	GRC
GREENLAND	GRL
GRENADA	GRD
GUADELOUPE	GLP
GUAM	GUM
GUATEMALA	GTM
GUINEA	GIN
GUINEA-BISSAU	GNB
GUYANA	GUY
HAITI	HTI
HEARD AND MC DONALD ISLANDS	HMD
HONDURAS	HND
HONG KONG	HKG
HUNGARY	HUN
ICELAND	ISL
INDIA	IND
INDONESIA	IDN
IRAN (ISLAMIC REPUBLIC OF)	IRN
IRAQ	IRQ
IRELAND	IRL
ISRAEL	ISR
ITALY	ITA
JAMAICA	JAM
JAPAN	JPN
JORDAN	JOR
KAZAKHSTAN	KAZ
KENYA	KEN
KIRIBATI	KIR
KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF	PRK
KOREA, REPUBLIC OF	KOR
KUWAIT	KWT
KYRGYZSTAN	KGZ

NAME	ABBR
LAO PEOPLE'S DEMOCRATIC REPUBLIC	LAO
LATVIA	LVA
LEBANON	LBN
LESOTHO	LSO
LIBERIA	LBR
LIBYAN ARAB JAMAHIRIYA	LBY
LIECHTENSTEIN	LIE
LITHUANIA	LTU
LUXEMBOURG	LUX
MACAU	MAC
MACEDONIA, THE FORMER YUGOSLAV REPUBLIC OF	MKD
MADAGASCAR	MDG
MALAWI	MWI
MALAYSIA	MYS
MALDIVES	MDV
MALI	MLI
MALTA	MLT
MARSHALL ISLANDS	MHL
MARTINIQUE	MTQ
MAURITANIA	MRT
MAURITIUS	MUS
MAYOTTE	MYT
MEXICO	MEX
MICRONESIA, FEDERATED STATES OF	FSM
MOLDOVA, REPUBLIC OF	MDA
MONACO	MCO
MONGOLIA	MNG
MONTSERRAT	MSR
MOROCCO	MAR
MOZAMBIQUE	MOZ
MYANMAR	MMR
NAMIBIA	NAM
NAURU	NRU
NEPAL	NPL
NETHERLANDS	NLD
NETHERLANDS ANTILLES	ANT
NEW CALEDONIA	NCL
NEW ZEALAND	NZL
NICARAGUA	NIC
NIGER	NER

NAME	ABBR
NIGERIA	NGA
NIUE	NIU
NORFOLK ISLAND	NFK
NORTHERN MARIANA ISLANDS	MNP
NORWAY	NOR
OMAN	OMN
PAKISTAN	PAK
PALAU	PLW
PANAMA	PAN
PAPUA NEW GUINEA	PNG
PARAGUAY	PRY
PERU	PER
PHILIPPINES	PHL
PITCAIRN	PCN
POLAND	POL
PORTUGAL	PRT
PUERTO RICO	PRI
QATAR	QAT
REUNION	REU
ROMANIA	ROM
RUSSIAN FEDERATION	RUS
RWANDA	RWA
SAINT KITTS AND NEVIS	KNA
SAINT LUCIA	LCA
SAINT VINCENT AND THE GRENADINES	VCT
SAMOA	WSM
SAN MARINO	SMR
SAO TOME AND PRINCIPE	STP
SAUDI ARABIA	SAU
SENEGAL	SEN
SEYCHELLES	SYC
SIERRA LEONE	SLE
SINGAPORE	SGP
SLOVAKIA (Slovak Republic)	SVK
SLOVENIA	SVN
SOLOMON ISLANDS	SLB
SOMALIA	SOM
SOUTH AFRICA	ZAF
SOUTH GEORGIA AND THE SOUTH SANDWICH ISLANDS	SGS
SPAIN	ESP

NAME	ABBR
SRI LANKA	LKA
ST. HELENA	SHN
ST. PIERRE AND MIQUELON	SPM
SUDAN	SDN
SURINAME	SUR
SVALBARD AND JAN MAYEN ISLANDS	SJM
SWAZILAND	SWZ
SWEDEN	SWE
SWITZERLAND	CHE
SYRIAN ARAB REPUBLIC	SYR
TAIWAN, PROVINCE OF CHINA	TWN
TAJIKISTAN	TJK
TANZANIA, UNITED REPUBLIC OF	TZA
THAILAND	THA
TOGO	TGO
TOKELAU	TKL
TONGA	TON
TRINIDAD AND TOBAGO	TTO
TUNISIA	TUN
TURKEY	TUR
TURKMENISTAN	TKM
TURKS AND CAICOS ISLANDS	TCA
TUVALU	TUV
UGANDA	UGA
UKRAINE	UKR
UNITED ARAB EMIRATES	ARE
UNITED KINGDOM	GBR
UNITED STATES	USA
UNITED STATES MINOR OUTLYING ISLANDS	UMI
URUGUAY	URY
UZBEKISTAN	UZB
VANUATU	VUT
VATICAN CITY STATE (HOLY SEE)	VAT
VENEZUELA	VEN
VIET NAM	VNM
VIRGIN ISLANDS (BRITISH)	VGB
VIRGIN ISLANDS (U.S.)	VIR
WALLIS AND FUTUNA ISLANDS	WLF
WESTERN SAHARA	ESH
YEMEN	YEM

NAME	ABBR
YUGOSLAVIA	YUG
ZAIRE	ZAR
ZAMBIA	ZMB
ZIMBABWE	ZWE

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 table variable to determine which value to return. Any input or variable can be used as 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.
Date Mask:	Specifies how SoftRater interprets dates being passed into an input file.
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 table 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 project.
Group:	A set of users that have the same access rights.
I	
IBER:	Insbridge Enterprise Rating System. This is the entire system.
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 Insbridge 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:	The previous acronym used by the Insbridge system. The IBRU acronym may still be used in some areas of the system.
If:	A step type available for use in calculated variables and algorithms.
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 table 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	
Mask:	A feature that allows the customer to determine how data in a table should be interpreted.
N	
Naming Standards:	A uniform naming structure applied to elements and programs either system wide or per PRODUCT.
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 project.
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:	A value that is passed out of the system after rating.
Result Mapping:	A defined set of results, inputs and variables displayed in the output file.
Revision:	A variable specific type of versioning.
RM:	RateManager. RateManager is a component within Insbridge that enables users to manage the product definition and modification process, including rating and underwriting logic.
S	
Sequence:	The order in which algorithms run.
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 project.
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".
Project:	Projects are classifications that fall in between products and program folders. Projects 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.
Table Variable:	A variable that uses other variables and inputs as criteria in determining the appropriate value.
Template:	Templates are exact copies of existing programs within a product 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.
V	
Variable:	A name used to represent a value that can change.
Version:	One of a sequence of copies of a program, each incorporating new modifications.
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 table variables that tells RateManager that one or more rows ignore the value passed in for the criteria.
Working Category:	A classification used to define how elements should run.
Worksheet:	Rating Worksheet / Premium Calculation Worksheet a document generated for each policy to convey basic information used to establish individual rates and premiums.
X	
XML ID:	A number automatically assigned by RateManager to identify inputs and categories.

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