

**Oracle Insurance**

**Insbridge Enterprise  
Rating  
SoftRater Server User  
Guide**

Release 5.1.x

December 2015

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Oracle Insurance Insbridge Enterprise Rating SoftRater Server User Guide

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## PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating SoftRater Server User Guide*. This manual describes the settings and options of Oracle Insurance Insbridge Enterprise Rating SoftRater Server (IBSS). IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within the Oracle Insurance Insbridge Enterprise Rating (Insbridge) system that executes the rules, rating, and underwriting instructions as defined by the user in Oracle Insurance Insbridge Enterprise Rating RateManager.

The SoftRater engine is an EJB component hosted in the Application Server and accessible through HTTP SOAP Proxy, and EJB – Direct JNDI interfacing. A database management system is used for content storage with support for all major DBMS vendors.

IBSS runs on:

- Oracle WebLogic (WebLogic)
- JBoss, a division of Red Hat (JBoss)
- IBM WebSphere (WebSphere)

## AUDIENCE

This manual is intended for system administrators who are tasked with setting up and managing Insbridge rating environments. Users should be familiar with their company's environments, databases and the requirements of the end users.

## 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 SoftRater User Guide.
- You can view these guides in-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  |
|---------------|--|
| <b>bold</b>   | 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. |

## 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 <sup>st</sup> Edition | P01-729-21         | V 4.7           | November 2013    | UI Update      |
| 2 <sup>nd</sup> Edition | P01-729-22         | V 4.8           | September 2014   | Update         |
| 3 <sup>rd</sup> Edition | P01-729-23         | V 4.9           | December 2014    | Update         |
| 4 <sup>th</sup> Edition | P01-729-24         | V 5.0.1         | August 2015      | Update         |
| 5 <sup>th</sup> Edition | P01-729-25         | R 5.1           | December 2015    | Update Release |

## SOFTRATER SERVER

Oracle Insurance Inbridge Enterprise Rating SoftRater Server (IBSS) is an administrative tool used in conjunction with SoftRater for WebLogic, JBoss, or WebSphere. It allows you to:

- Configure the SoftRater engine
- Rate test files
- Execute a SoftData request
- Enter a SoftLibrary
- Manage an IBSS Clustered environment

## CLUSTERED ENVIRONMENTS

IBSS allows for clustered environments. A clustered environment is where multiple instances of IBSS are created on one or more servers of the same type and share the same configuration. The benefits to a cluster are that all instances in the cluster work together to provide high availability, reliability, scalability, and increased performance.

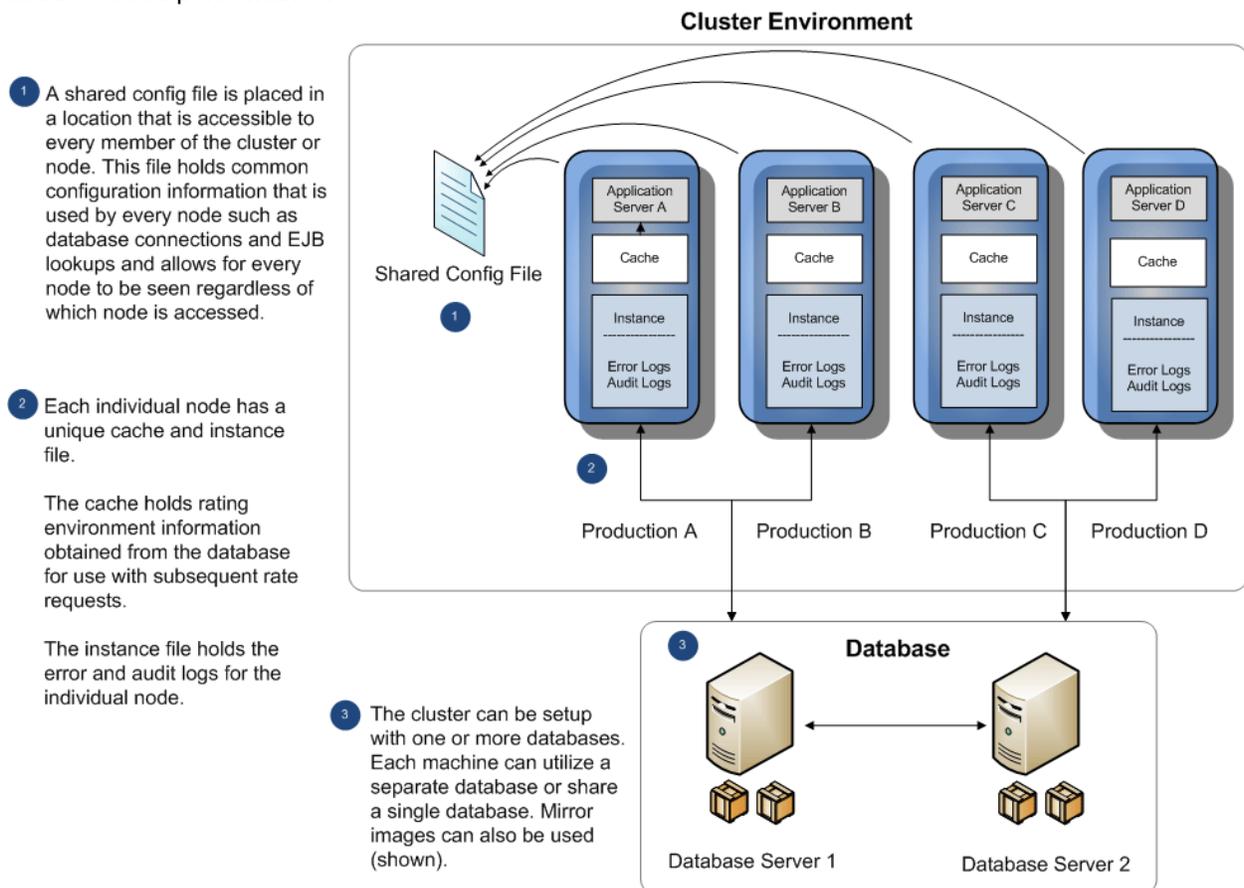


Figure 1 IBSS Cluster

## Shared Information in an IBSS Cluster

Clusters in IBSS share common information and common features but each individual instance holds unique cache and log files. Services and actions such as resetting environments can be performed at the individual level or for the entire cluster. The common information includes the config.xml file, database environments, and SoftLibraries. This allows for information that is shared to be consistent throughout the IBSS cluster. For example, if you make a change to a database environment, the config.xml file gets updated. Since every IBSS instance in the cluster has access to the updated config.xml file, every instance is updated. Likewise if you make an update to a SoftLibrary, you do not need to update every IBSS instance. You can do one update. All IBSS instances in the cluster will have access to the updated SoftLibrary.

When you set up a cluster, each individual IBSS deployment is entered as a node. The node is the endpoint of the IBSS instance. Each node has an IBSS home page and can be presented on the home page of each IBSS instance. It does not matter from where you enter the environment or subscriber information. Each node shares the same configuration file so each node sees the same information.

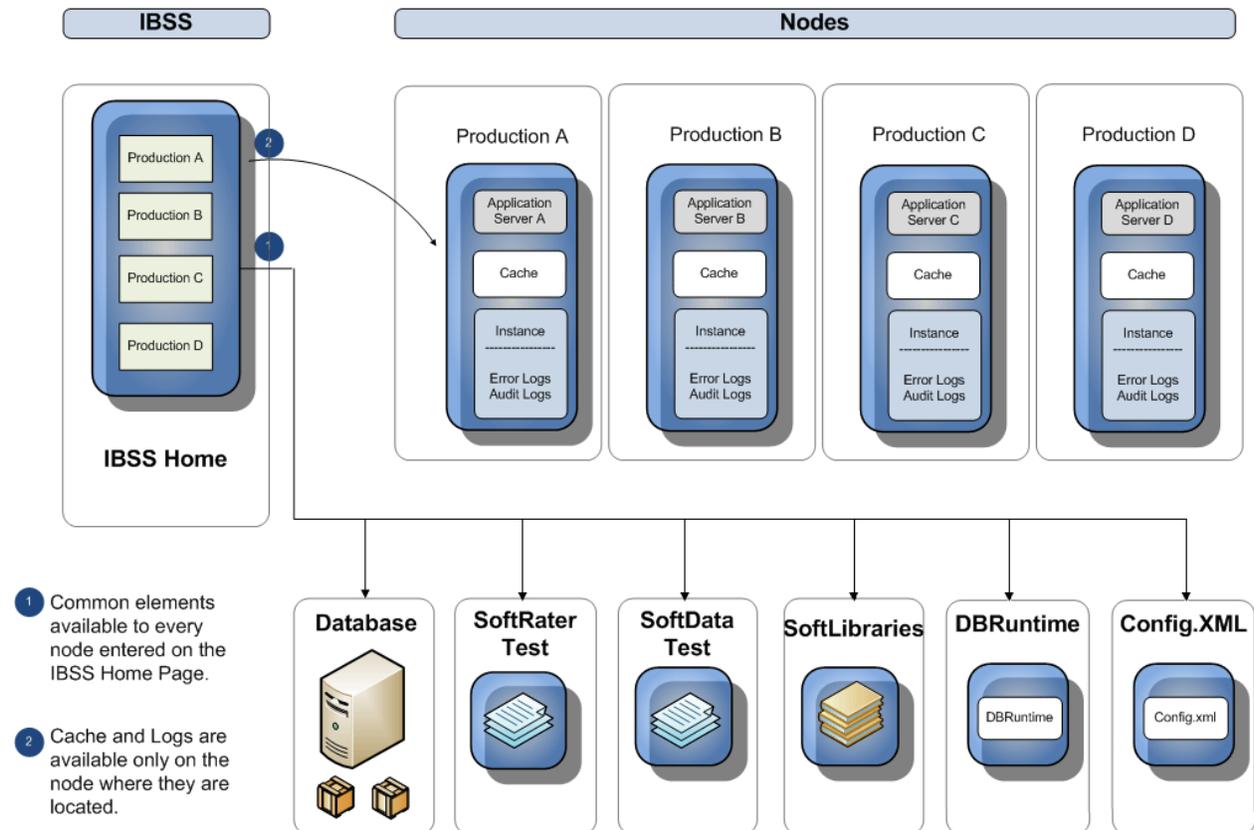


Figure 2 Shared Information in an IBSS Cluster

Once nodes are created in the IBSS cluster, SoftRater, SoftData, and DBRuntime can utilize any node for testing. For example, if you wanted to test a SoftData call on node A, you would select node A from the node option on the SoftRater Test Interface page. You would not have to enter the node A IBSS instance and perform the test from there. You can test from any node in the cluster. If you then wanted to test node B, you would select node B from the option. You would not have to enter the node B IBSS instance.

Settings for services are done at the Nodes level and apply to every node in the cluster. Settings for logs are under the Config folder and apply to every member of the cluster.

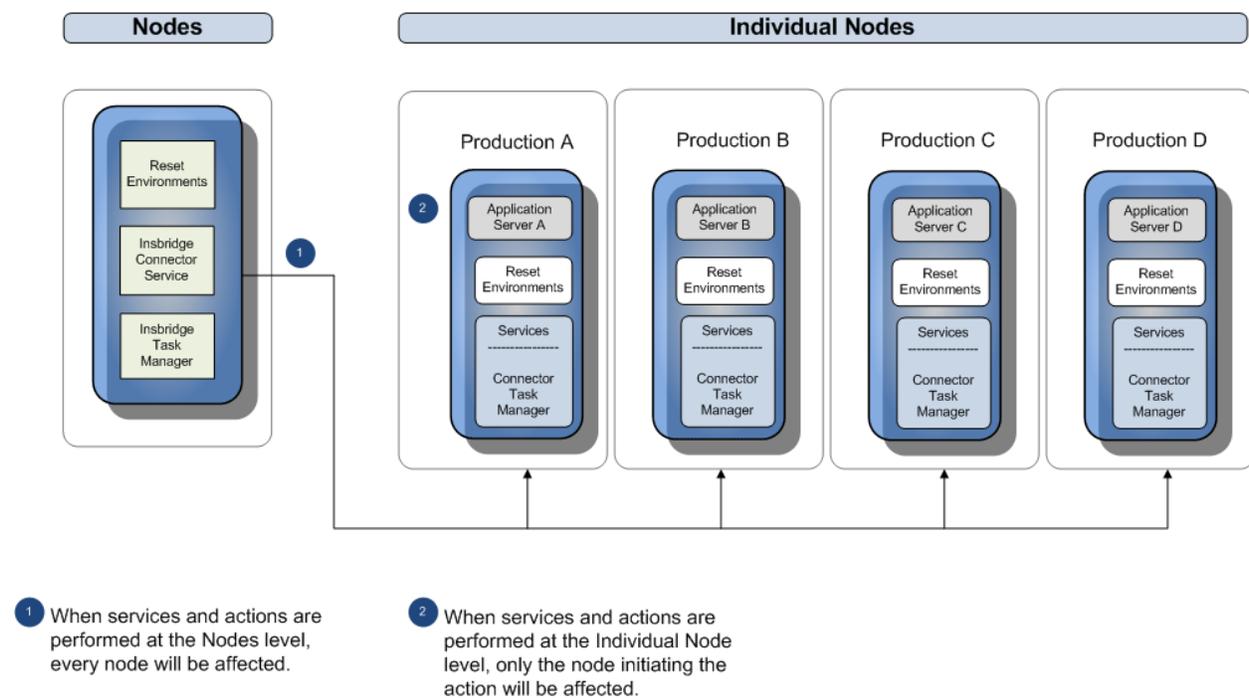
## Unique Information in an IBSS Cluster

The areas that are unique to each node in the cluster are cache and log files. Cache holds the rating environment information obtained from the database. This information is used in subsequent rate requests. Cache can be purged across all members of the cluster or only for the selected node.

Another area unique to each node is Logs. The Logs file holds error and audit logs for each member of the cluster. These logs are unique to the instance and no information is shared. Individual error and audit logs can assist when debugging issues. You can see the actions performed by each IBSS instance without having to sort through logs that do not refer to the node in question.

## Options Available to All or One in an IBSS Cluster

Services and actions can be performed at the individual level or for the entire cluster. Options available on the Nodes folder and on each individual node are reset environments, starting and stopping the Insbridge Connector Service, Insbridge Task Manager, and viewing messages. When services and actions are performed at the Nodes level, every node will be affected. When performed at the Individual node level, only the node initiating the action will be affected.



For example, if you reset environments from the Nodes level, cache will be cleared in every member of the cluster. If you reset environments from an individual node, only that node will have cache cleared.

## IBSS Clusters

Any SoftRater for Java engine (WebLogic, WebSphere, or JBoss) can utilize clustering. The actual setup of a cluster on the application server(s) is up to the discretion of the installer, but there are a few requirements for a cluster such as each instance points to the same configuration file and that all instances must be of the same application server type. Once the cluster has been created, the installer will need to provide the server host(s) and the port(s) used along with any database information.

Creating a cluster in IBSS:

- Enter the subscriber information
- Enter the environments
- Enter the node information
- Enter the cluster in IBFA

An IBSS cluster can consist of one or more instances. Cluster information can be entered on any member of the cluster. The cluster setup must also be entered in the corresponding IBFA.

## Standalone Instances

It is possible to have multiple IBSS instances that are not part of a cluster. These standalone instances will each have their own config file and cannot be managed from a common instance because there is no shared config file. This means that every standalone IBSS instance would require subscriber, environment, and node information to be entered. This is not the recommended setup.

## Ports Used by WebLogic, JBoss, and WebSphere

WebLogic, JBoss, and WebSphere utilize ports to access IBSS:

- WebLogic uses port 7001
- JBoss uses port 8080
- WebSphere uses port 9080

---

**NOTE:** *These are the most commonly used ports. The port number may be changed when domains, cells, nodes, servers or instances are created.*

---

If the designated port is unavailable or there is a conflict, your system administrator can change the port. For example, you can change the WebLogic default port (7001) during the Server Domain creation.

If you cannot find the IBSS instance you need at the port location specified, please check the port being used with your system administrator.

---

**NOTE:** *The IBSS parameter in the application URL must be capitalized.*

---

## WebSphere

For a WebSphere environment, IBSS can be accessed by going to `http://<yourserver>:9080/IBSS`, where `<yourserver>` is the server the IBSS is installed on.

If you do not know this information, contact your system administrator.

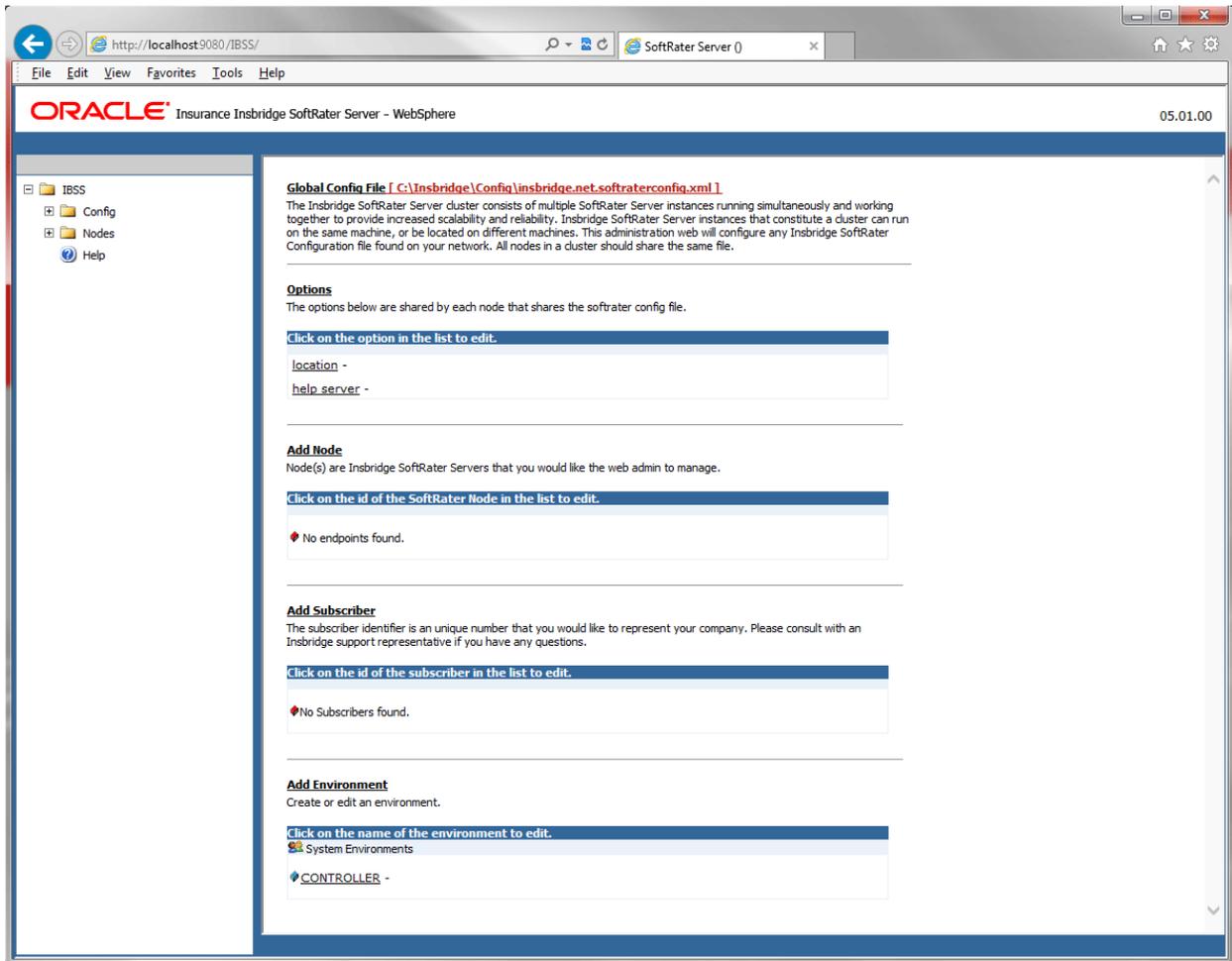


Figure 3 SoftRater Server for WebSphere

---

**NOTE:** The top of the screen lists the platform you are on and the version of IBSS.

---

## JBoss

For a JBoss environment, IBSS can be accessed by going to `http://<yourserver>:8080/IBSS`, where `<yourserver>` is the server the IBSS is installed on.

If you do not know this information, contact your system administrator.

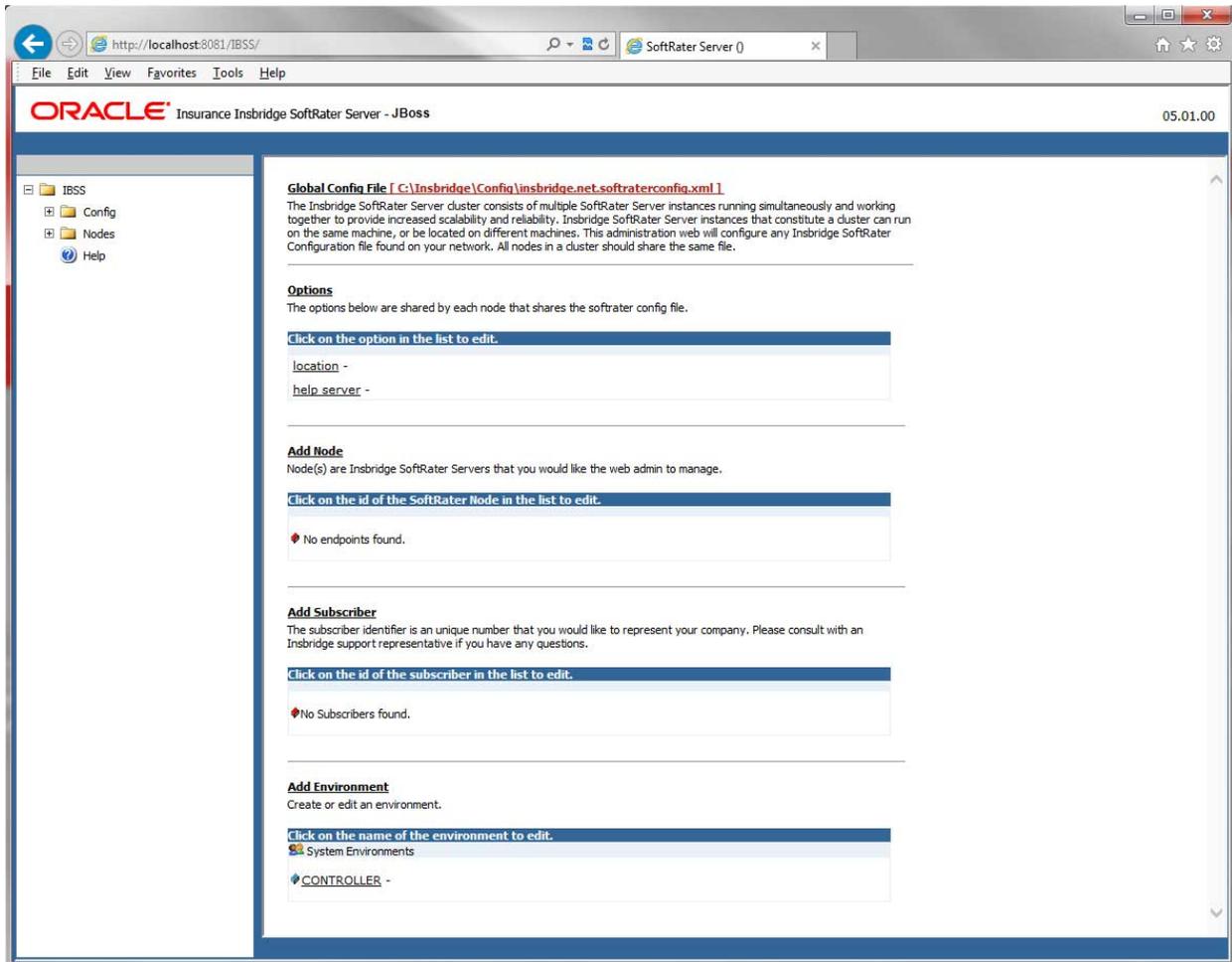


Figure 4 SoftRater Server for JBoss

**NOTE:** The top of the screen lists the platform you are on and the version of IBSS.

## WebLogic

For a WebLogic environment, IBSS can be accessed by going to `http://<yourserver>:7001/IBSS`, where `<yourserver>` is the server the IBSS is installed on.

If you do not know this information, contact your system administrator.

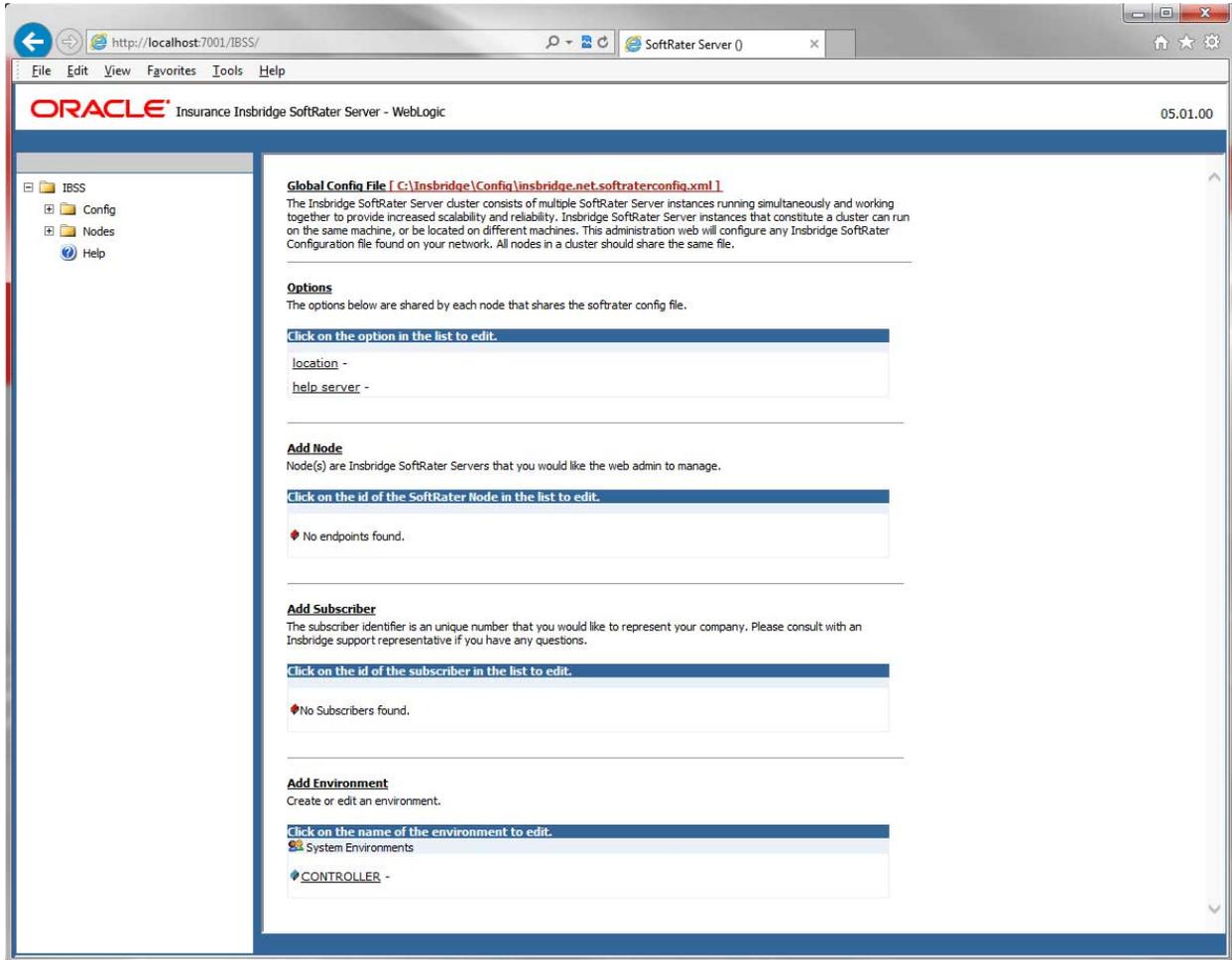


Figure 5 SoftRater Server for WebLogic

**NOTE:** The top of the screen lists the platform you are on and the version of IBSS.

# IBSS HOME PAGE

The IBSS Home page is the landing page whenever you open IBSS. Before you can use the SoftRater engine, subscriber, environments, and node information must be entered. Subscriber and environment information is generally done at installation time, but may be entered or updated at a later date if necessary. Node information can be done later as well.

The IBSS Home page is where you set up and manage:

- Subscribers
- Environments
- Nodes
- Options
- View the configuration file

This page operates the same way for WebLogic, JBoss, or WebSphere.

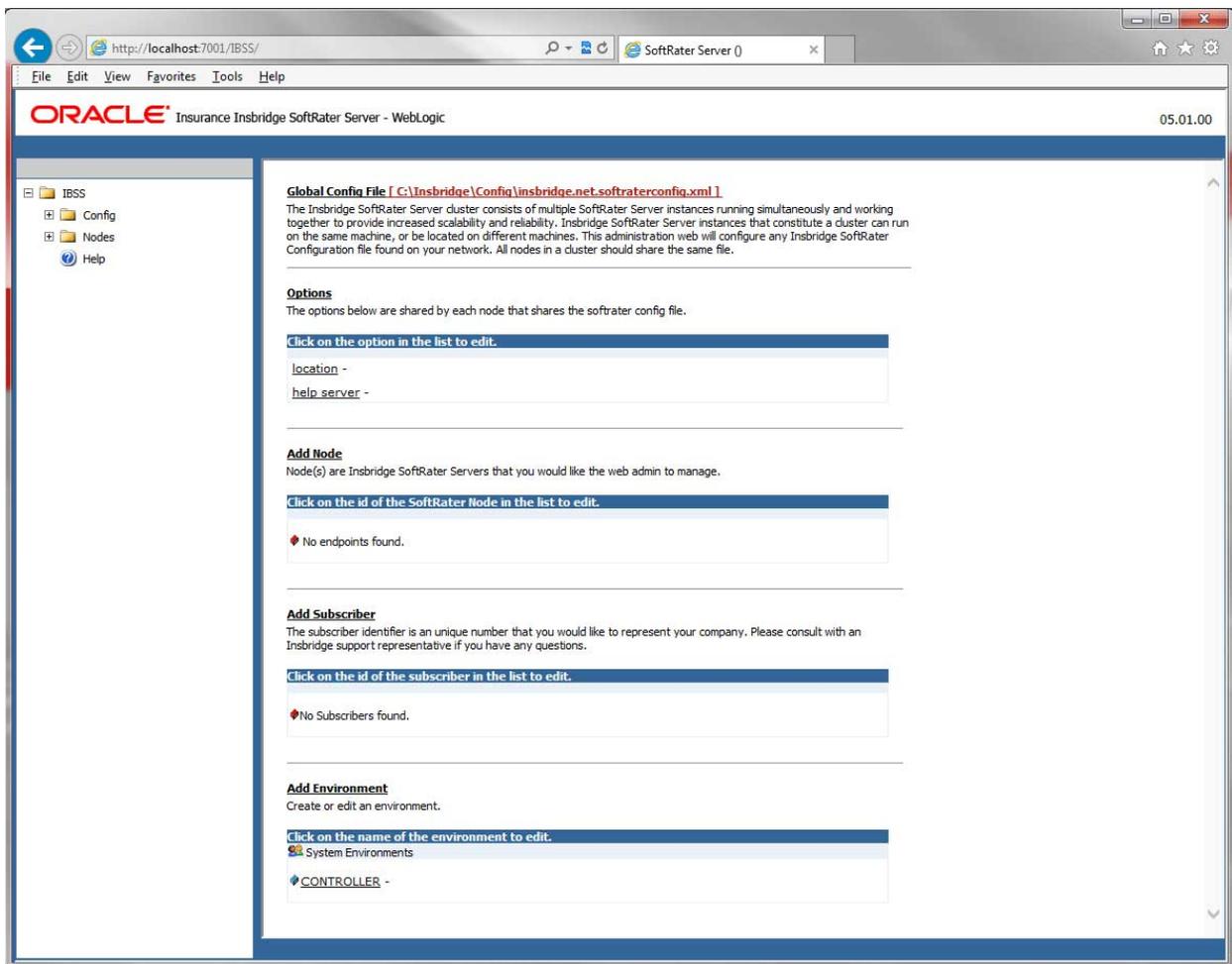


Figure 6 SoftRater Page

## CONFIGURATION FILE

IBSS utilizes a configuration file (Insbridge.net.softaterconfig.xml) that is parked on the server where IBSS is deployed. When you make a change to subscribers, environments, etc. using IBSS, the configuration file gets updated. If the configuration file is shared across multiple IBSS instances, for example in a clustered environment, then every IBSS instance in the cluster has access to the update. The configuration file contains settings for:

- Configuration information
- Environments
- Database Connections
- SoftLibrary information

---

**NOTE:** Clustered environments must use the same config file.

---

### Viewing the Configuration File

Complete file information is not available until you have configured all environments.

1. On the IBSS Home page, click the underlined configuration file path at the top; i.e. **C:\INSBRIDGE\Config\insbridge.net.softaterconfig.xml**.

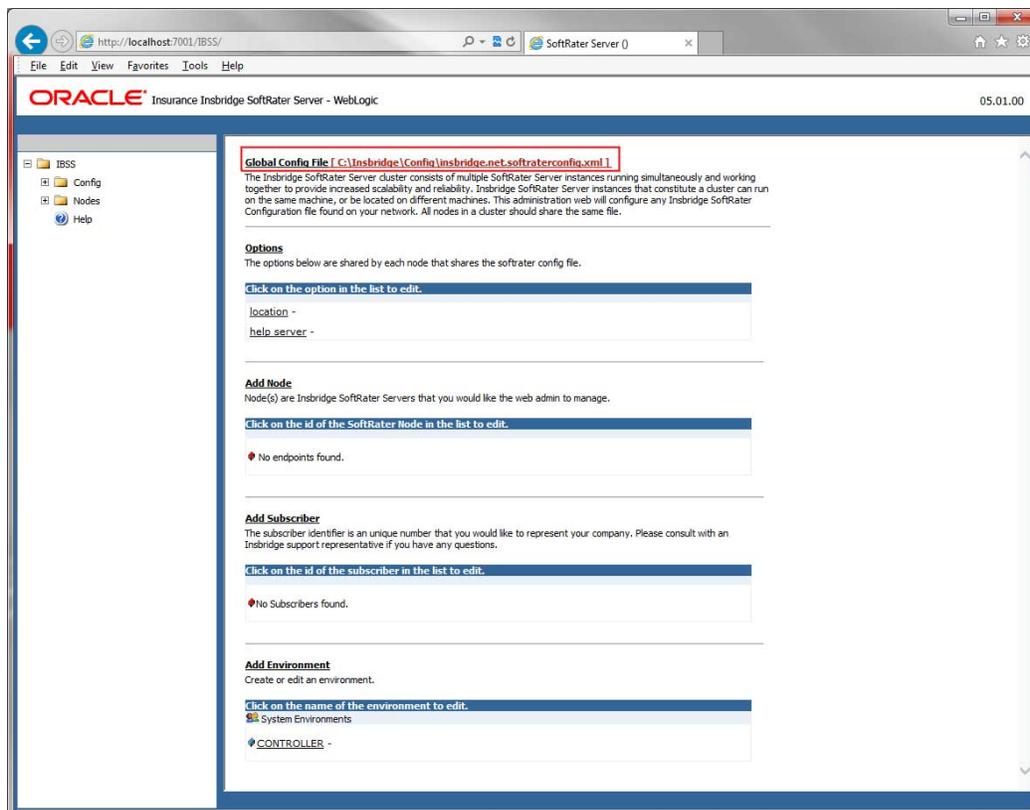


Figure 7 Insbridge Page Configuration File Path

## 2. The configuration file opens in a new window.

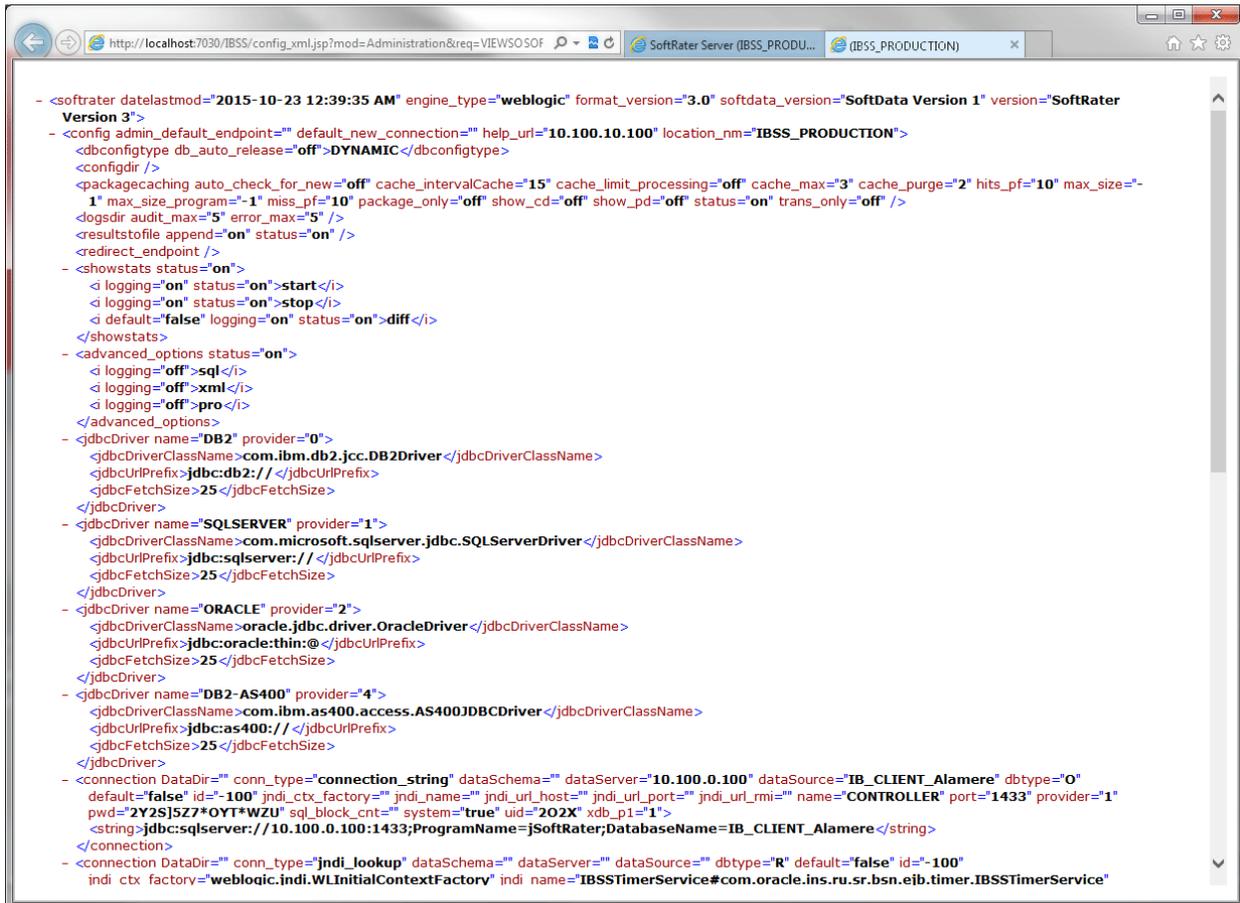


Figure 8 Configuration File New Window

**NOTE:** The configuration path is set at installation. You may have a different configuration path than the one in the example.

In a clustered environment, the same configuration path is displayed for every member of the cluster.

If you have multiple IBSS instances that do not share the same config file, the configuration path is the path for the current instance only.

## OPTIONS

Options include the friendly name used to identify the server and the location of the help server. Options are shared by each node.

The location and help server fields are validated for entries not for content.

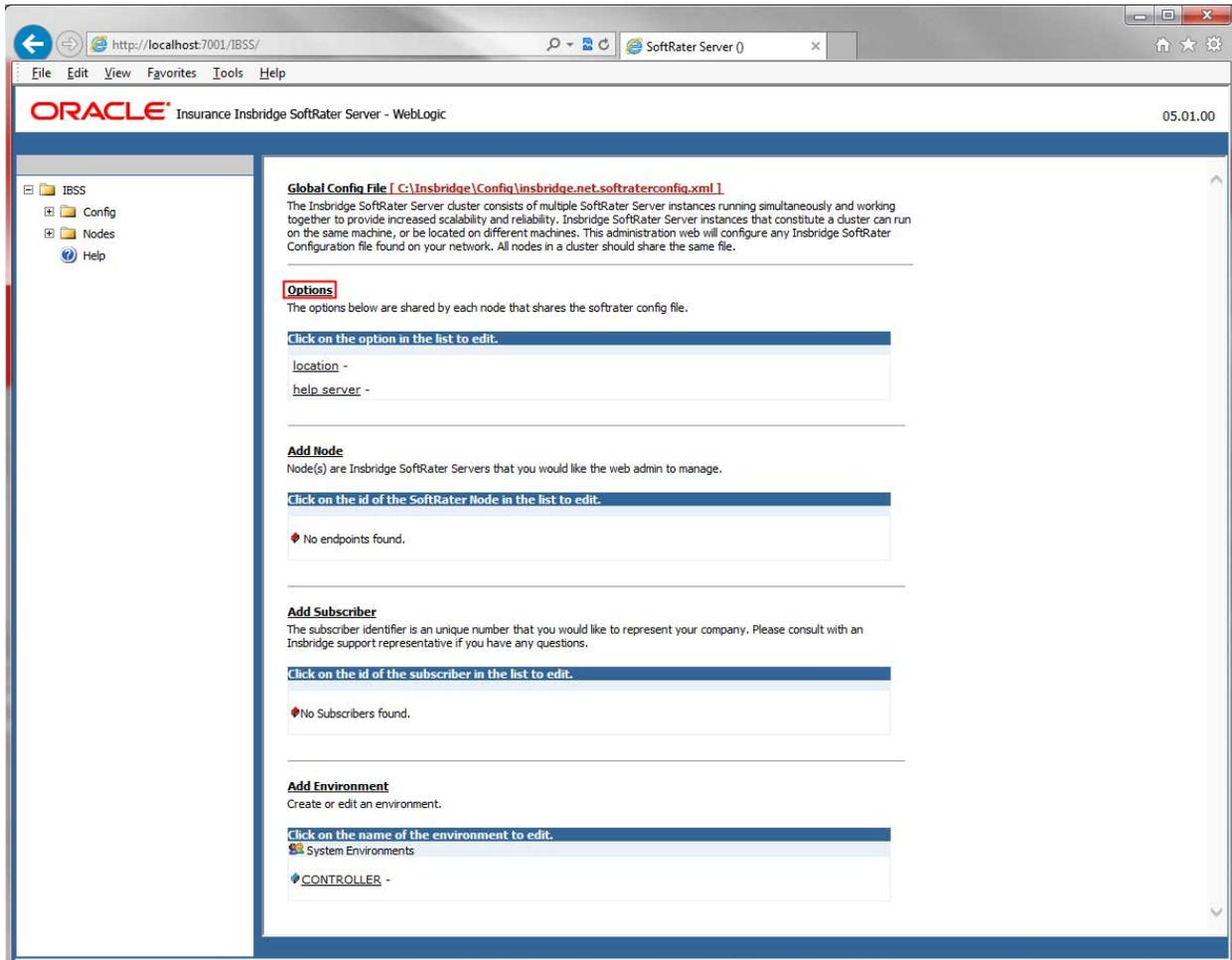


Figure 9 Option on the IBSS Home Page

### Location Name

The location name is the name of the server where IBSS is located. The Location Name is the friendly name that is returned as part of the XML response content for each transaction to show the originating site for the result. The location name also is displayed on the top SoftRater Server tab on the browser.

### Help Server

Help files are installed with IBFA. Enter the name or IP address of the server where IBFA was installed. This allows users to access the help files when they click on the help link. Leaving this field blank results in an error when users click the Help link on the IBSS home page.

You may need to contact your system administrator for the location of IBFA.

## Setting Options

The options window can be opened by clicking the Options link on the IBSS home page or clicking the location or help server links.

1. Click the Options link on the IBSS home page. A separate window is displayed.
2. Enter in the Location Name. This can be a server name or IP address.
3. Enter in the Help Server. This can be a server name or IP address.
4. Click Save. The entries are displayed on the IBSS home page immediately.

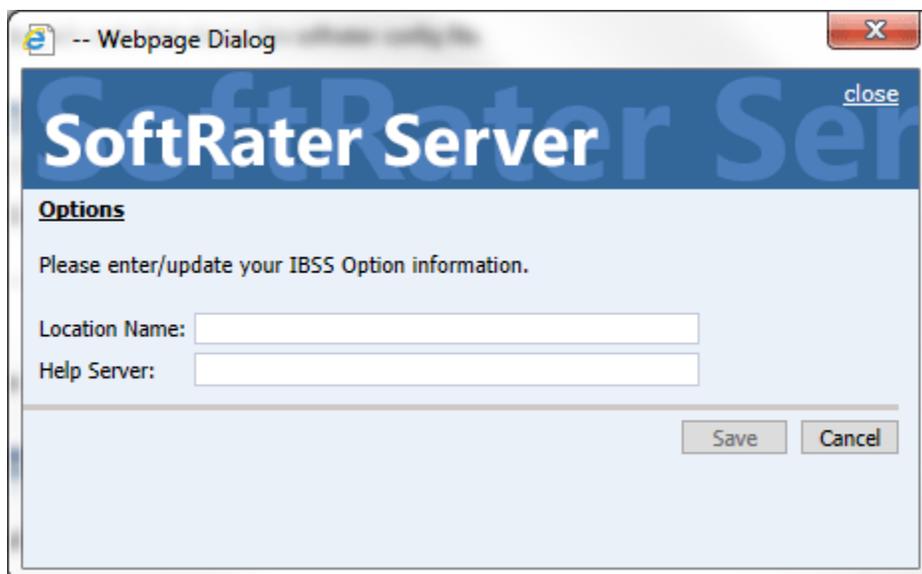


Figure 10 Entering Options

## Editing Options

Options can be edited at any time. Once an entry has been made in the field, the field must have a value. You cannot remove the entry and leave the field blank.

Any updates or changes must be saved prior to closing the window. Cancel disregards any changes and closes the window.

## Deleting Options

Options cannot be deleted.

## SUBSCRIBERS

A *subscriber* is a group or collective of users and environments under a single identity. This identity is used to manage and configure the group’s activities and databases. A subscriber may be a single company, a group within a company, or a single person.

Any subscriber that is in IBFA must be created here also.

### Adding a Subscriber

You can add a subscriber when IBSS is installed or later. The same subscriber information entered in IBFA should be entered in IBSS. The difference between an IBFA subscriber and an IBSS subscriber is the description. A description can be entered in IBFA but is not needed in IBSS.

The Subscriber IDs must match between IBFA and IBSS. The subscriber ID can be a 1-5 digit number and must be unique. The ID is fixed after you save and cannot be edited. In IBSS, only the name can be edited. If you have entered the subscriber ID incorrectly, you must re-enter the subscriber.

If you are using nodes, you only have to enter the subscriber information once. Each node is populated with the same subscriber information.

1. From the IBSS home page, click the **Add Subscriber** link.

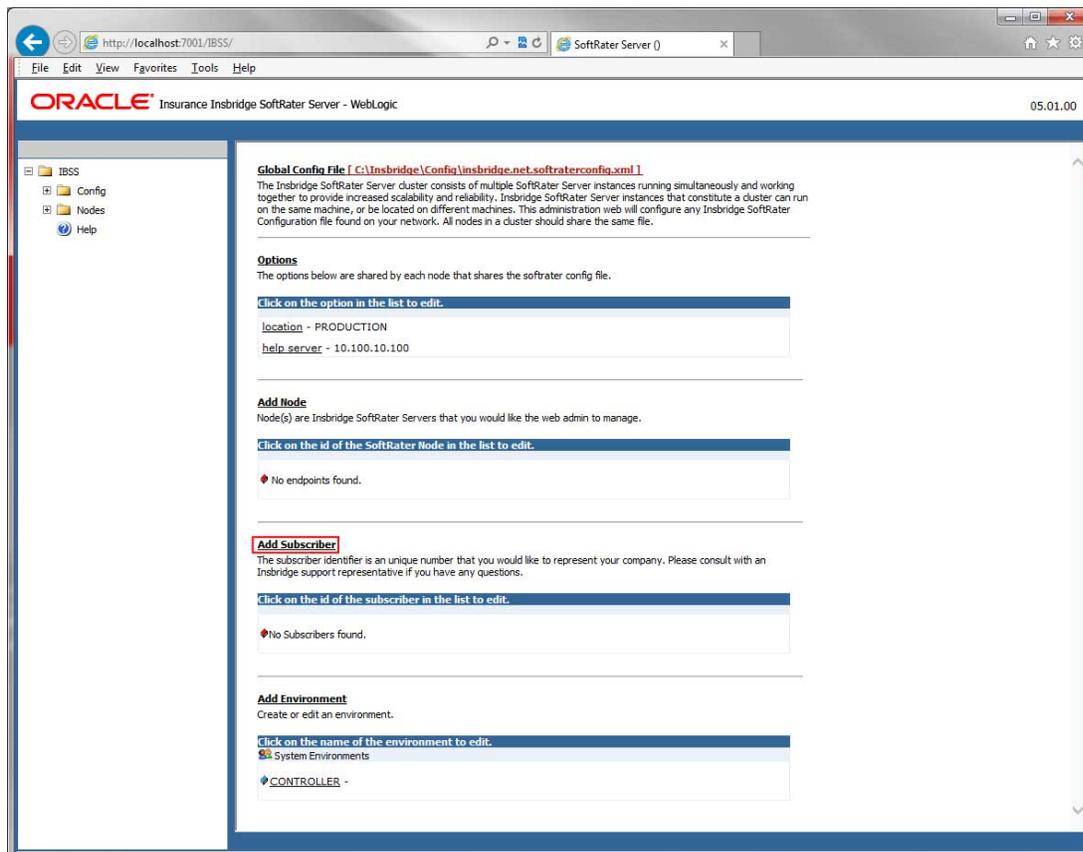


Figure 11 Adding Subscriber Links

- This opens the **Add Subscriber** window.



Webpage Dialog

close

## SoftRater Server

### Subscriber

Please enter the subscriber information below.

Id:

Name:

Add Cancel

Figure 12 Adding a New Subscriber

- Enter the **ID**, and **Name** for the new subscriber. When you finish entering the information, click **Add**.
- The new subscriber is now the list of subscribers.

---

### Add Subscriber

The subscriber identifier is a unique number that you would like to represent your company. Please consult with an Insbridge support representative if you have any questions.

Click on the id of the subscriber in the list to edit.

|  |
|--|
|  <a href="#">8659</a> - Alamere |
|--|

---

Figure 13 Subscriber List

## Editing a Subscriber

The only edit allowed to a subscriber is the Name.

To edit a Subscriber, click on the hyperlinked Subscriber ID number. This brings up the Edit Subscriber window. Make any changes and click Save to save your changes and return to the previous window.

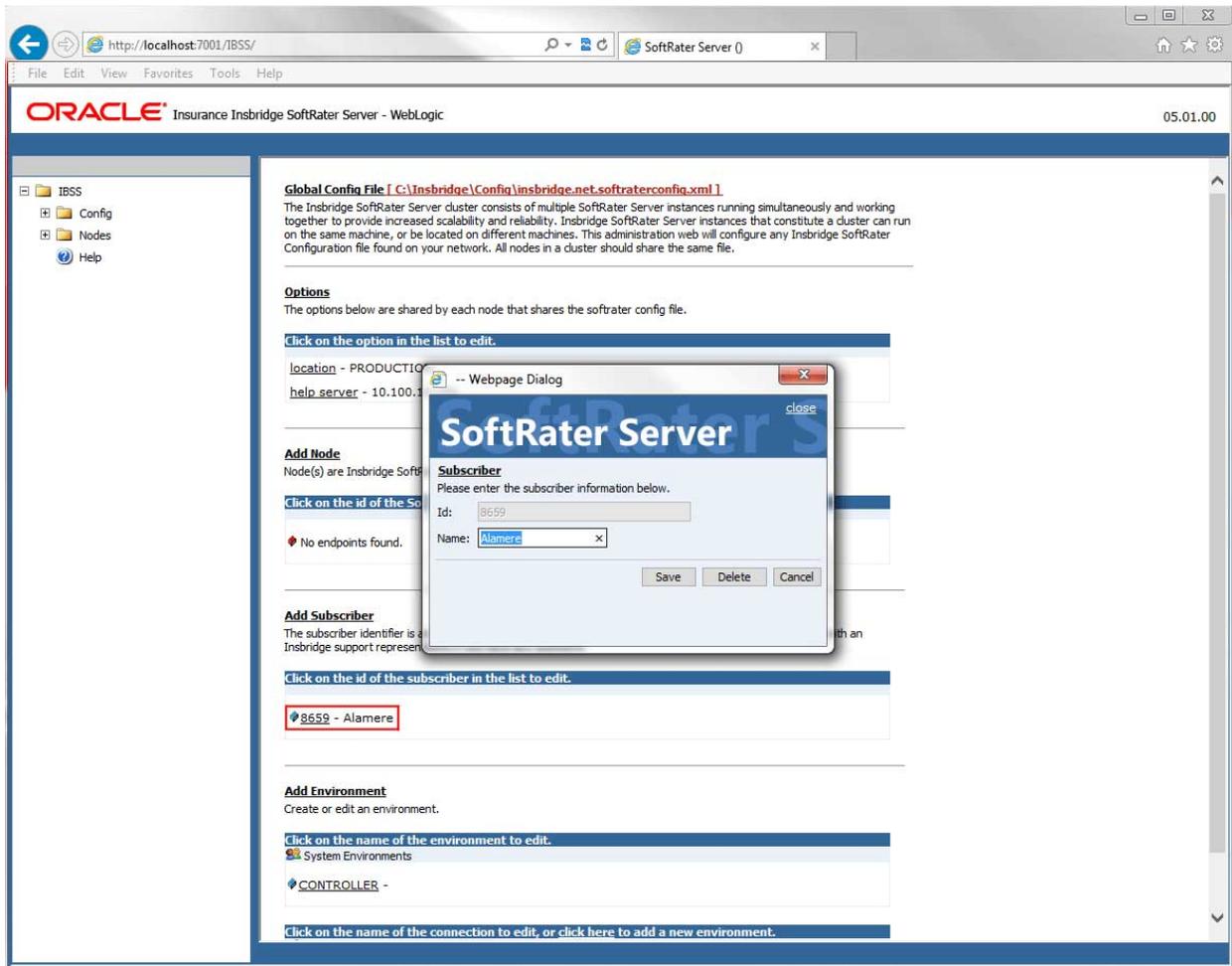


Figure 14 Editing Subscriber

## Deleting a Subscriber

If a subscriber is no longer needed, they can be deleted. Make certain a subscriber is not needed before deleting them, as this action cannot be undone. When a subscriber is deleted, all associated database connections and environment settings are also deleted.

1. From the IBSS home page, click the hyperlinked Subscriber ID number.
2. This opens the **Edit Subscriber** window.



Figure 15 Deleting a Subscriber

3. Click the **Delete** button. A warning message is displayed.

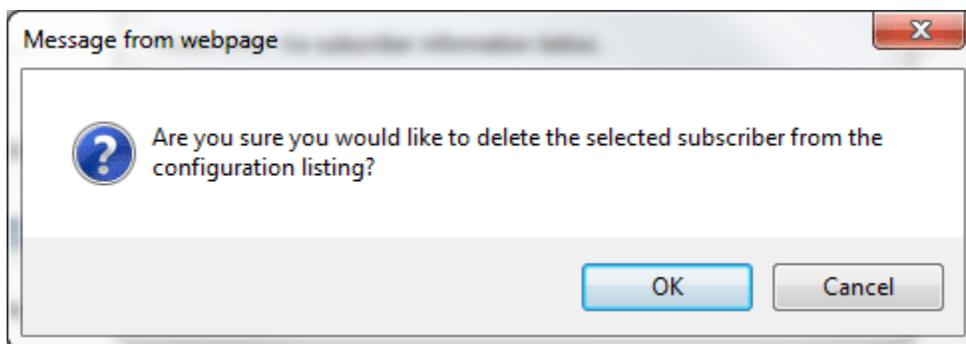


Figure 16 Confirm Deleted Subscriber

4. Click **OK** to remove the Subscriber or **Cancel** to return to the previous window.

---

**WARNING:** Deleting a subscriber also deletes all database connections and environments setup for that subscriber.

---

## ENVIRONMENTS

The **Environment** section allows you to configure rating environments. An environment is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. There is no limit to the number of environments you may have. The Add Environment link is located on the IBSS home page.

Enter any environment that you want to share across the cluster. Environments entered here can be discovered by the IBFA instance when creating the IBSS cluster environment. IBSS cluster environments must be entered in IBFA. You only have one space to enter an environment, but as long as the cluster has all the databases entered, IBFA will be able to locate every environment entered.

### Adding an Environment

Prior to creating up an environment in IBSS you need the database server, port, database name, user ID, and password information. If you are using an Oracle database, you also need to know if it is case sensitive or insensitive. You also may need Query block or schema name if you are entering a DB2 or Oracle database.

1. To create a new environment, click the Add Environment link on the IBSS home page.

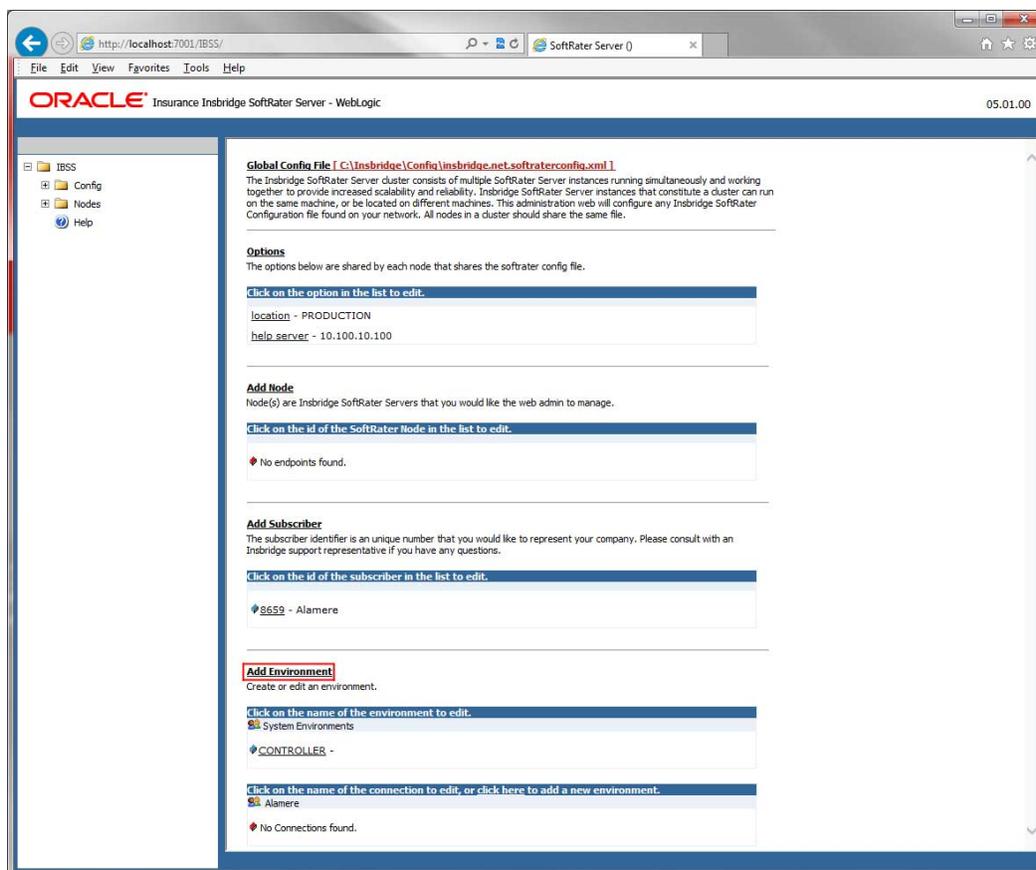


Figure 17 Add Environment

2. A separate screen is displayed. Different types of environments require different information:

---

## For DSN Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the Insbridge system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the Insbridge system.

**Database Server:** The name or IP address of the server where packages are loaded.

**Database Port:** Listening port for the target Database Management System.

**Default port numbers:**

- SQL Server – 1433
- Oracle – 1521
- DB2 – 50000

**Query Block:** For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction.

For DB2, enter a query size that is relative to the SQL statement heap size. For example, if your SQL statement heap size is 2048, you may want to enter a query size of 5. The larger the heap size, the larger the query size can be.

You may also need to increase the application heap size.

Query block is not needed for SQL Server or Oracle databases.

**Database Name:** The name of the database where packages are loaded.

**Schema Name:** The schema name for the database. Schema Name is not needed for SQL connections.

**Database User Id:** The username to access the database.

**Database Password:** The password for the username entered.

**Provider Type:** The type of the database

- **ORACLE**
- **ORACLE (BINARY\_CI) (use for case insensitive)**
- **DB2**
- **DB2(AS400)**
- **MS SQL SERVER**
- **NONE N/A**

**Database Type:** The type of database being accessed:

- **SoftRater** – The default. This option should be used for most installations.
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

**Data Dir:** The location of the SoftRater Packages (SRP's) on the server.

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon.

3. When you are finished entering information, click **Save**.



Figure 18 Environment Setup

4. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

## For JNDI Entries

**Subscriber:** Select the name of the subscriber from the menu.

**Environment Name:** A name for the environment. This is the friendly name.

**Environment Type:** Select the type of connection:

- **DSN** – The connection information is held by the Insbridge system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the Insbridge system.

**Name:** The name of the data source.

**Context Factory:** A URL context factory is a special object factory that creates contexts for resolving URL strings.

**RMI:** The Java Remote Method Invocation used.

**URL Host:** The name or IP of the host server.

**URL Port:** The port number used by the host server.

**Provider Type:** The type of the database

- **ORACLE**
- **ORACLE (BINARY\_CI) use for case insensitive**
- **DB2**
- **DB2(AS400)**
- **MS SQL SERVER**
- **NONE N/A**

**Database Type:** The type of database being accessed:

- **SoftRater – The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

**Data Dir:** The location of the SoftRater Packages (SRP's) on the server.

**Default Environment:** Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon. 

5. When you are finished entering information, click **Save**.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: BATCH

Environment Type: JNDI

Name: jdbc/batchDB

Context Factory: weblogic.jndi.WLInitialContextFactory

RMI: t3

Url Host: localhost

Url Port: 7001

Provider Type: ORACLE

Database Type: SoftRater

Data Dir:

Default Environment: False

Save Delete Test Connection! Close

Figure 19 Creating a JNDI Environment

6. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

## **Connection to an Oracle RAC**

When connecting to an Oracle RAC, you can use SID. For example:

Database Name: sid (Connection using SID)

Or use the Service name. To connect to the service name, a slash has to be added in front of the database name. For example:

Database Name: /servicename (Connection using SERVICE)

When using SID, do not use the slash before the name.

## Controller Environment and Batch Rating

Batch rating requires a Controller environment entry. The controller manages the requests from the system. This is not the controller used by the IBFA. Only Oracle database connections can be used.

### Controller

The Controller environment is a SoftRater database. This can be a standalone database, used strictly for managing batch ratings, or it can be a shared SoftRater database. If the Controller environment is shared, an entry must be made as a regular environment as well.



The screenshot shows a web browser window titled "Webpage Dialog" displaying the "SoftRater Server" interface. The main heading is "SoftRater Server" with a "close" link. Below the heading is the "Options" section, which prompts the user to "Please enter/update your IBSS Option information." The form contains the following fields and values:

| Field                | Value         |
|----------------------|---------------|
| Subscriber:          | System        |
| Environment Name:    | CONTROLLER    |
| Environment Type:    | DSN           |
| Database Server:     | 10.100.10.100 |
| Database Port:       | 1521          |
| Query Block:         |               |
| Database Name:       | ord           |
| Schema name:         | IBSR_BATCH    |
| Database User Id:    | sa            |
| Database Password:   | .....         |
| Provider Type:       | ORACLE        |
| Database Type:       | SoftRater     |
| Data Dir:            |               |
| Default Environment: | False         |

At the bottom of the form, there are four buttons: "Save", "Delete", "Test Connection!", and "Close".

Figure 20 Adding a Controller Environment

No data directory is used for a Controller environment. The Controller environment cannot be default.

## RateManager Environment

A RateManager environment can be added to IBSS if rating is to be done from RateManager to the IBSS environment and a debug report is needed. You can rate from RateManager against an IBSS environment but no debug report is produced. If you want to see a debug report, an RM environment must be set up in IBSS. This allows for the debug details to be stored locally and made available to RateManager.

The RateManager environment must be identical to the RM environment where rating is to be done. This applies to rating done from Test Case Editor and Testing.

## Editing an Environment

Environments can be edited at any time. The subscriber cannot be edited. If you have selected the wrong subscriber you must delete the incorrect entry and re-enter with the correct subscriber.

1. To edit an environment, click the Environment link on the IBSS home page that you want to edit.

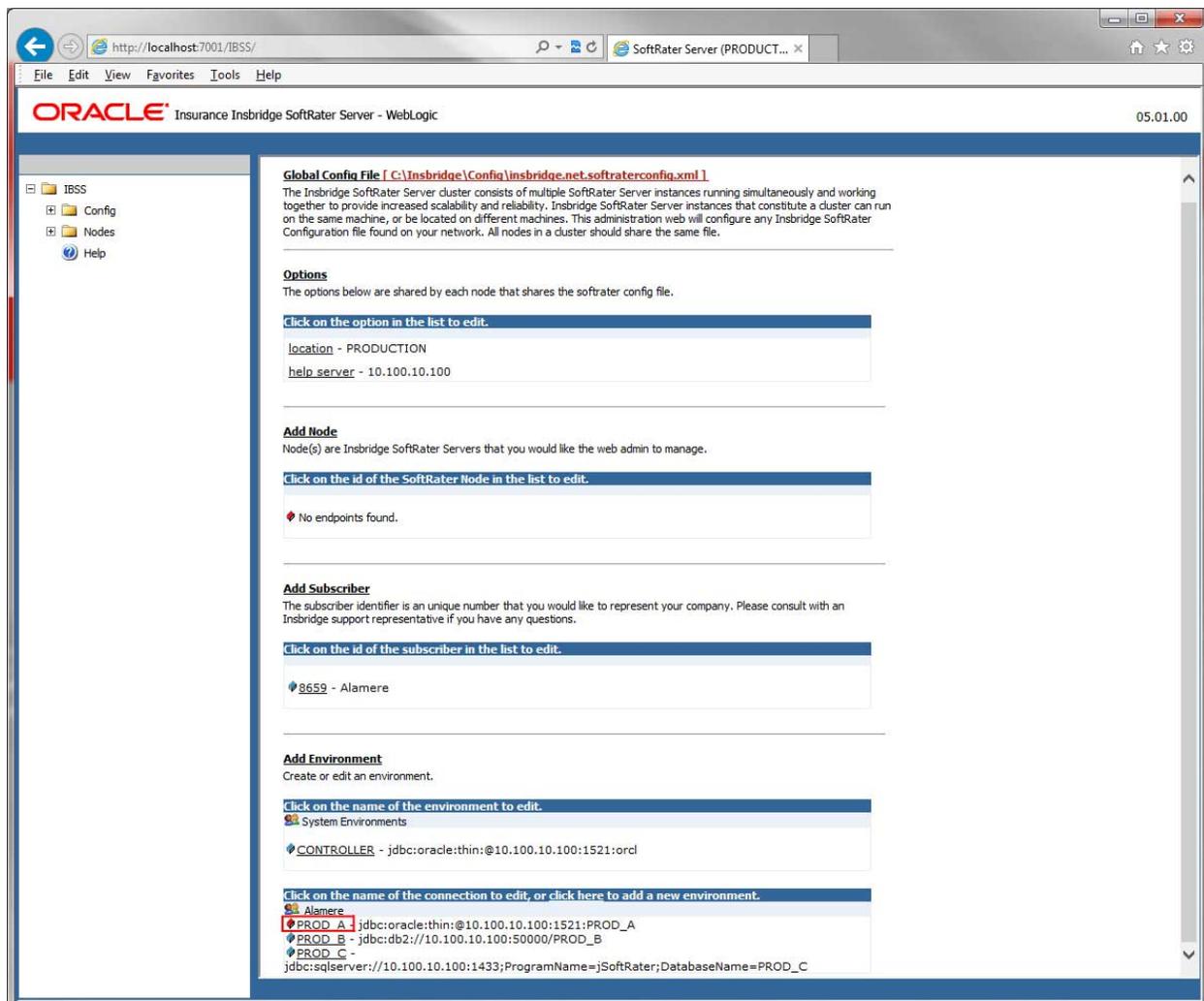


Figure 21 Edit Environment

2. The environment information window is presented. The subscriber information cannot be edited. All other fields are open for editing. The field highlighted in blue is the field you are currently in.

**Options**  
Please enter/update your IBSS Option information.

Subscriber: Alamere

Environment Name: PROD\_A

Environment Type: DSN

Database Server: 10.100.10.100

Database Port: 1521

Query Block:

Database Name: PROD\_A

Schema name: ord

Database User Id: sa

Database Password: .....

Provider Type: ORACLE

Database Type: SoftRater

Data Dir: C:\Inbridge\PROD\_A

Default Environment: True

Save Delete Test Connection! Close

Figure 22 Editing an Environment

3. When you are finished editing information, click **Save**.
4. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

## Testing an Environment

You should test your environment after saving to ensure the connection properties are valid. After saving the environment entry, click **Test Connection**. The results will be displayed in a message window.

### Success Message

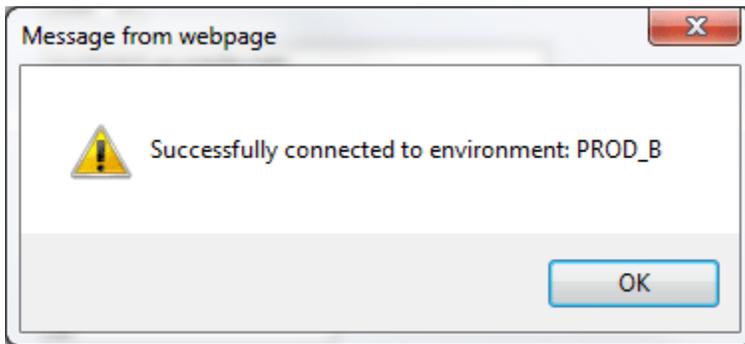


Figure 23 Successful Test Connection

### Failed Messages

Failed messages from the test connection can show some common errors, such as typos, bad logins and failing to save.

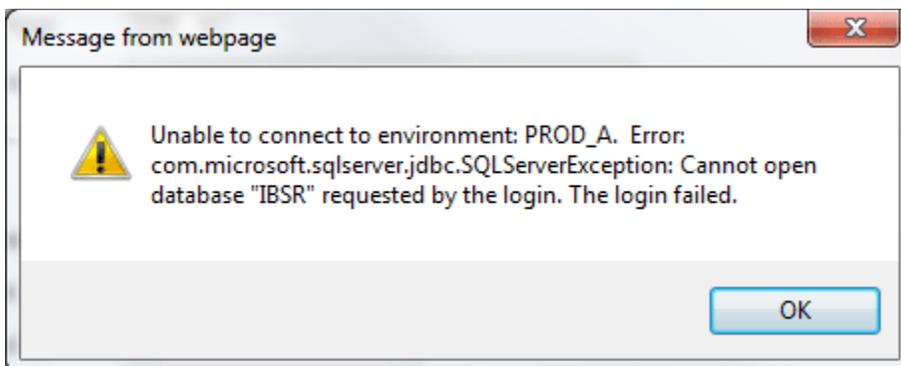


Figure 24 Failed Test Connection Bad Login Information

The “cannot open database...the login failed” error can sometimes results from bad user ID or password being entered.

If a database location or port number is incorrect, the information returned in the message may direct you to verify the connection properties, check the instance is running, check that the instance ports are open or that no fire wall is prohibiting the connection.

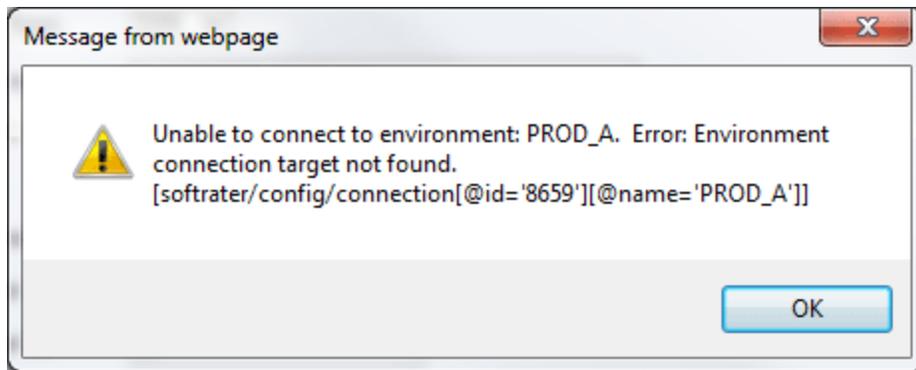


Figure 25 Failed Test Connection Not Saved

An environment connection target not found error sometimes results from the environment not being saved after updates. Save the environment and try again.

## Deleting an Environment

An environment can be deleted at any time.

1. To delete an environment, click the Environment link on the IBSS home page that you want to permanently remove.
2. The environment information window is presented, click **Delete**.
3. You must confirm deleting the environment.

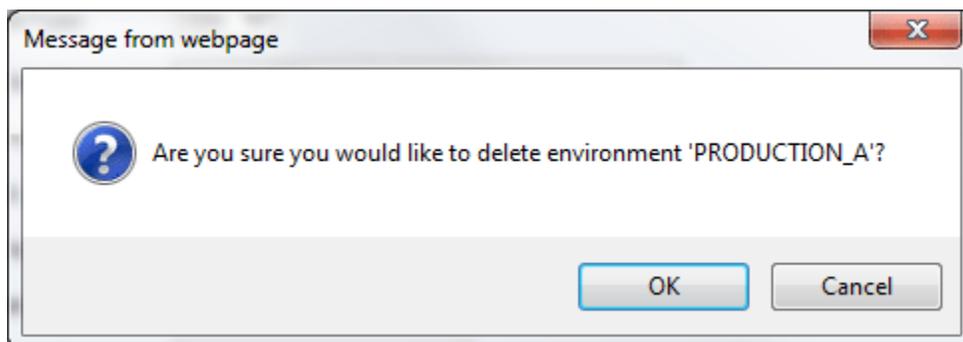


Figure 26 Deleting an Environment

4. Click **OK** to delete the environment or **Cancel** if you do not wish to delete the environment.
5. The environment will be deleted.
6. The deleted environment will still be available for rating against until the configuration XML file is reloaded. This is done by resetting the environments.

---

**WARNING:** Make sure this is the action you want to take. **This action cannot be undone.**

---

## NODE SETUP AND CONFIGURATION

A node is the endpoint of an IBSS instance. Every instance of IBSS must have a node created. Nodes allow you to manage the cache and log files and to reset the environment of the node. Nodes have the additional advantage of allowing for clustered environments to be managed from one location.

Nodes are created and managed on the IBSS home page.

## NODE ORGANIZATION

In Figure 27 Cluster/Node Structure, the IBSS instance on the left is the instance that has been accessed using the IBSS URL (<http://<YOUR SERVER>:<port>/IBSS>). This could be any one of the member nodes. All nodes have the same view. This is because of the shared config.xml file.

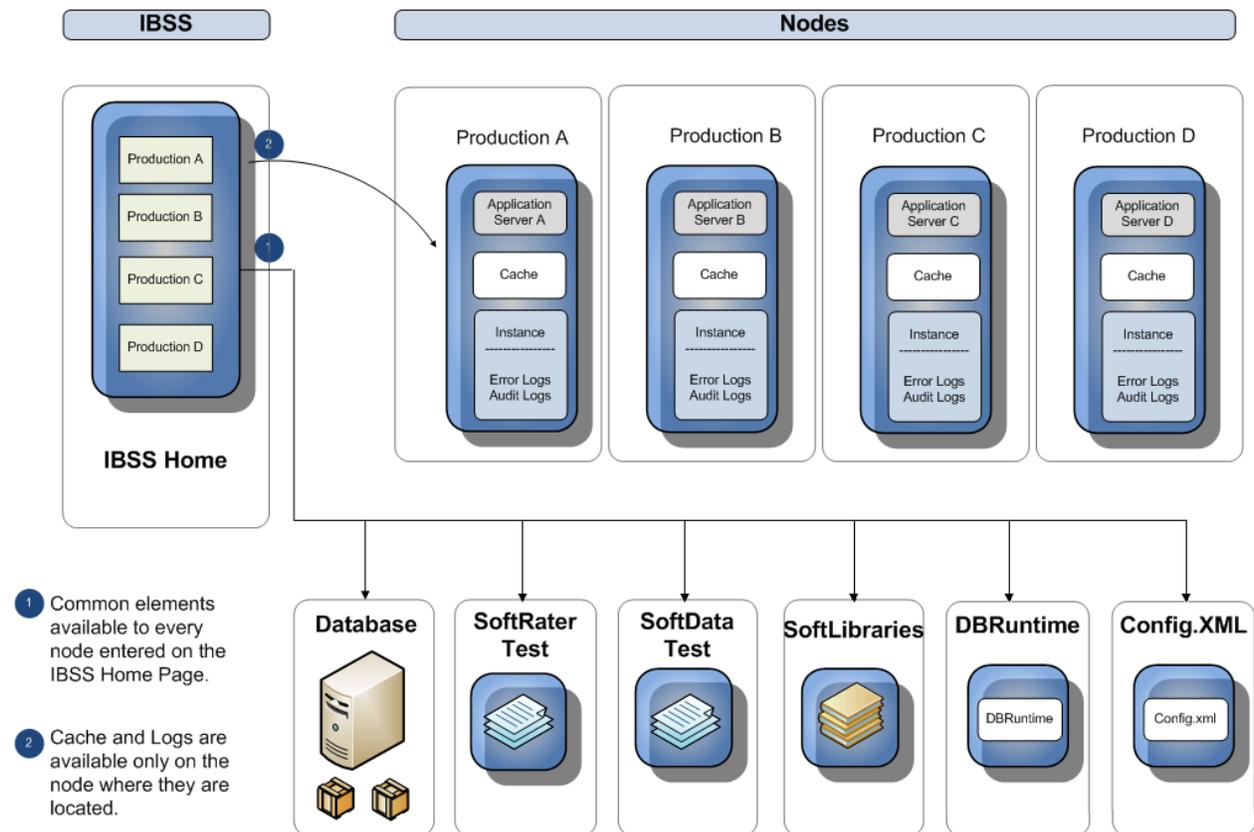


Figure 27 Cluster/Node Structure

The IBSS instance that has been accessed is also presented as a node. There is no distinction between the node you have accessed and other member nodes. You will see the same information presented on the IBSS home page and have access to the same databases, SoftRater Test, SoftData Test, DBRuntime options, and SoftLibraries.

There are features that can be accessed on a selected node only:

- Reset a single node environment
- Start and stop services for a single node
- View messages for a single node
- Cache
- Logs

These features can only be accessed under the node where you want to view or perform an action.

## ADDING A NODE

Every IBSS instance requires a node, which should be entered at installation. Additional nodes can be entered then or at a later time. Nodes are listed under the Add Node section on the IBSS home page. Nodes are also listed on the left side of the window in alphabetical order. To view nodes, expand the Nodes folder.

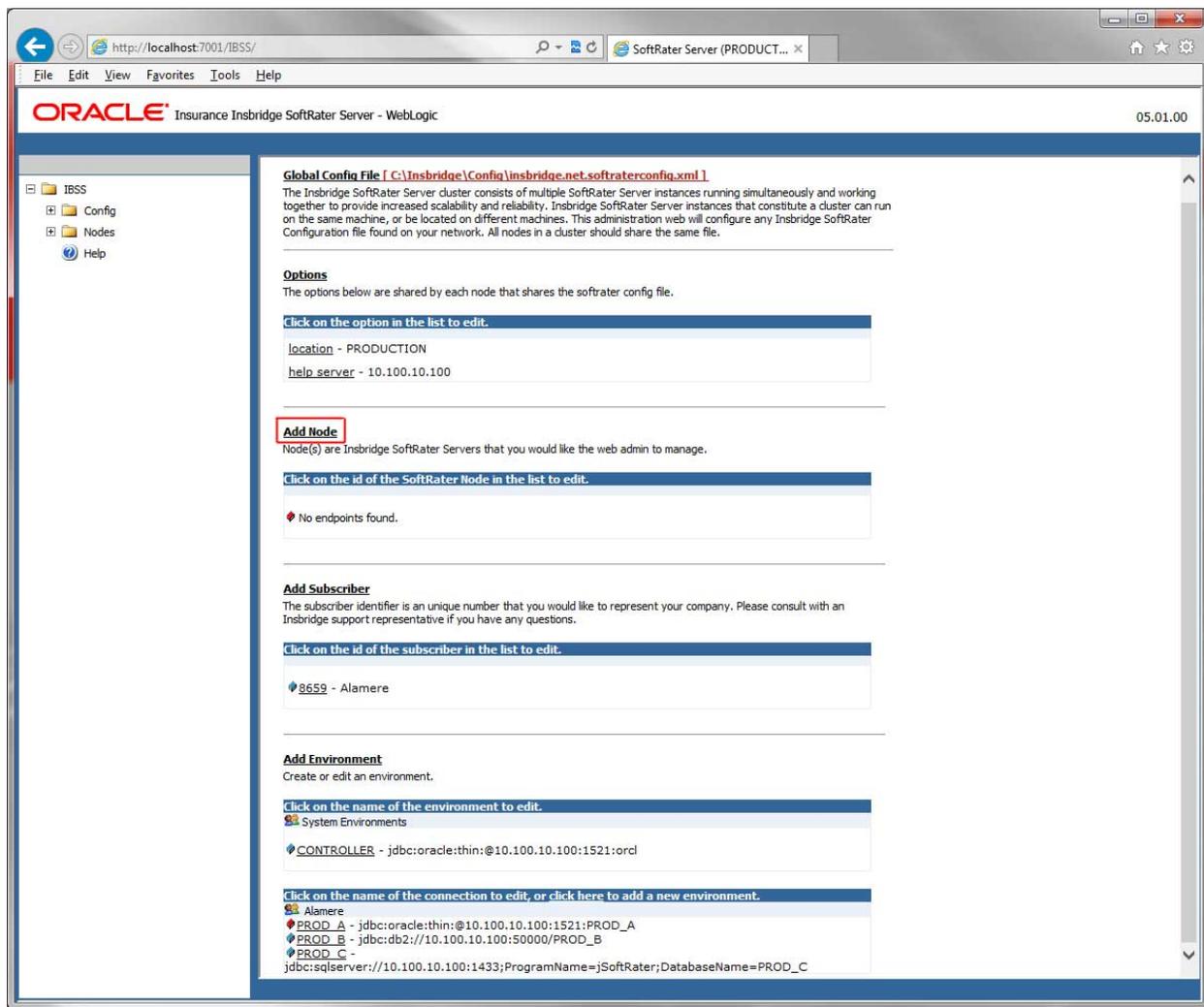


Figure 28 Adding a Node

To create a node, server information is needed:

- **Server OS**
- **Server Name or IP Address**
- **Port Used**

1. From the IBSS home page, click the **Add Node** link.
2. This opens the **Add Subscriber** window.



Figure 29 Adding a Node

3. Select the server operating system from the drop down. There are three choices, Linux, Mainframe and Windows.
4. Enter the server host name or IP address and port. The default ports:
  - **WebLogic:** Port 7001
  - **WebSphere:** Port 9080
  - **JBoss:** Port 8080

The format for this is: [SERVER NAME]:[PORT NUMBER]

5. Enter a friendly name. This is the name displayed for the node.
6. Check if this is a secure environment. A secure environment connects using HTTPS.
7. It is recommended that the Ping Server option be used to test the connection. This is an optional step but can be helpful. If a connection cannot be made, the node cannot be saved.

8. Click **Add** to add the node. The connection is validated and if a node cannot be added, an error message is displayed. Please correct the error and try again. Only nodes that can connect will be added.

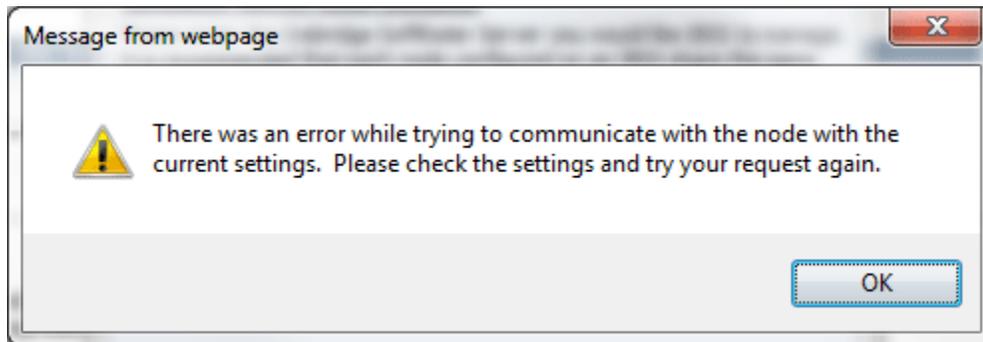


Figure 30 Node Error

---

**NOTE:** It is recommended that server names or IP addresses be used over localhost.

---

## EDITING A NODE

Nodes can be edited at any time. The server name or IP address cannot be edited. If you have entered an incorrect server name or IP address, you must delete the incorrect entry and re-enter with the correct information.

1. To edit a node, click the Node link on the IBSS home page that you want to edit.



Figure 31 Editing a Node

2. The node information window is presented. The server name or IP address cannot be edited. All other fields are open for editing. The field highlighted in blue is the field you are currently in.
3. When you are finished editing information, click **Save**.
4. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

## Testing a Node

You can test for connectivity using the Ping Server option of the Node instance window. The Ping Server lets you know immediately if a connection can be made to the node.

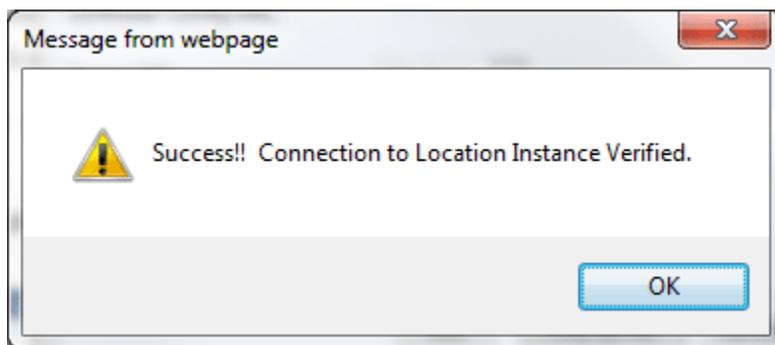


Figure 32 Successful Node Connection

If connectivity cannot be established, a fail message is returned.

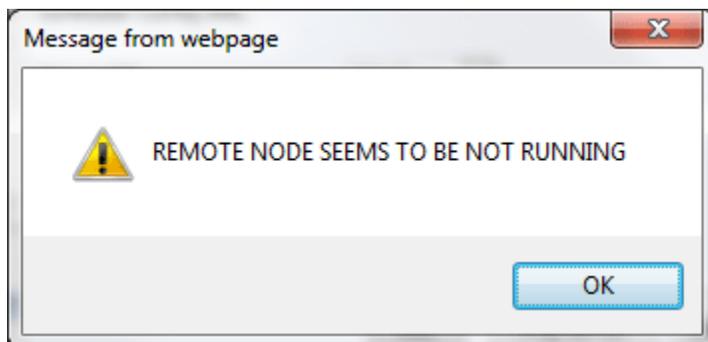


Figure 33 Down Node Message

## DELETING A NODE

A node can be deleted at any time.

1. To delete a node, click the node link on the IBSS home page that you want to delete.
2. The environment information window is presented, click **Delete**.
3. You will be asked to confirm deleting the node.

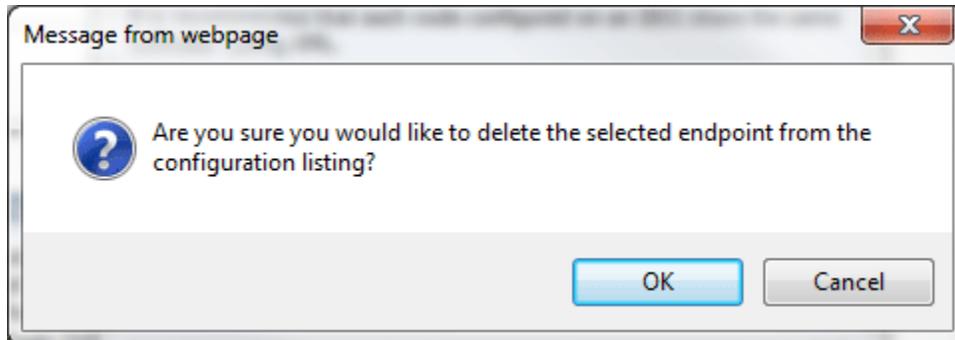


Figure 34 Deleting a Node

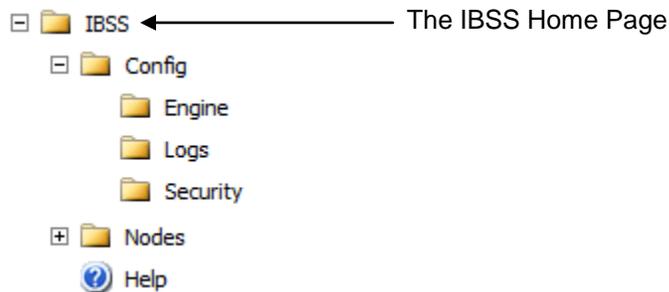
4. Click **OK** to delete the node or **Cancel** if you do not wish to delete the node.
5. The node will be deleted.
6. The deleted node may still be listed until the configuration XML file is reloaded. This is done by resetting the environments.

# CONFIG

The Config section holds the settings that apply to the entire IBSS system. Every setting has a default that is used. When the setting is updated, the update applies to the entire system.

After making any change to any option in the Config area, you must reset the environments for every node. The option to reset environments for every node is on the Nodes folder. Resetting environments reloads the config.XML file. Environments need to be reset to activate changes made in the Config area. Changes do not take effect until the SoftRater configuration XML file is reloaded. The reset happens immediately.

The Config section of IBSS has three pages:



The Config section of IBSS has three folders:

- **Engine**
- **Logs**
- **Security**

## ENGINE

The Engine page is where you can select the information to be automatically logged and the statistical information to be returned in result XML files. The settings here apply to all nodes.

To navigate to the Engine page, select IBSS->Config->Engine.

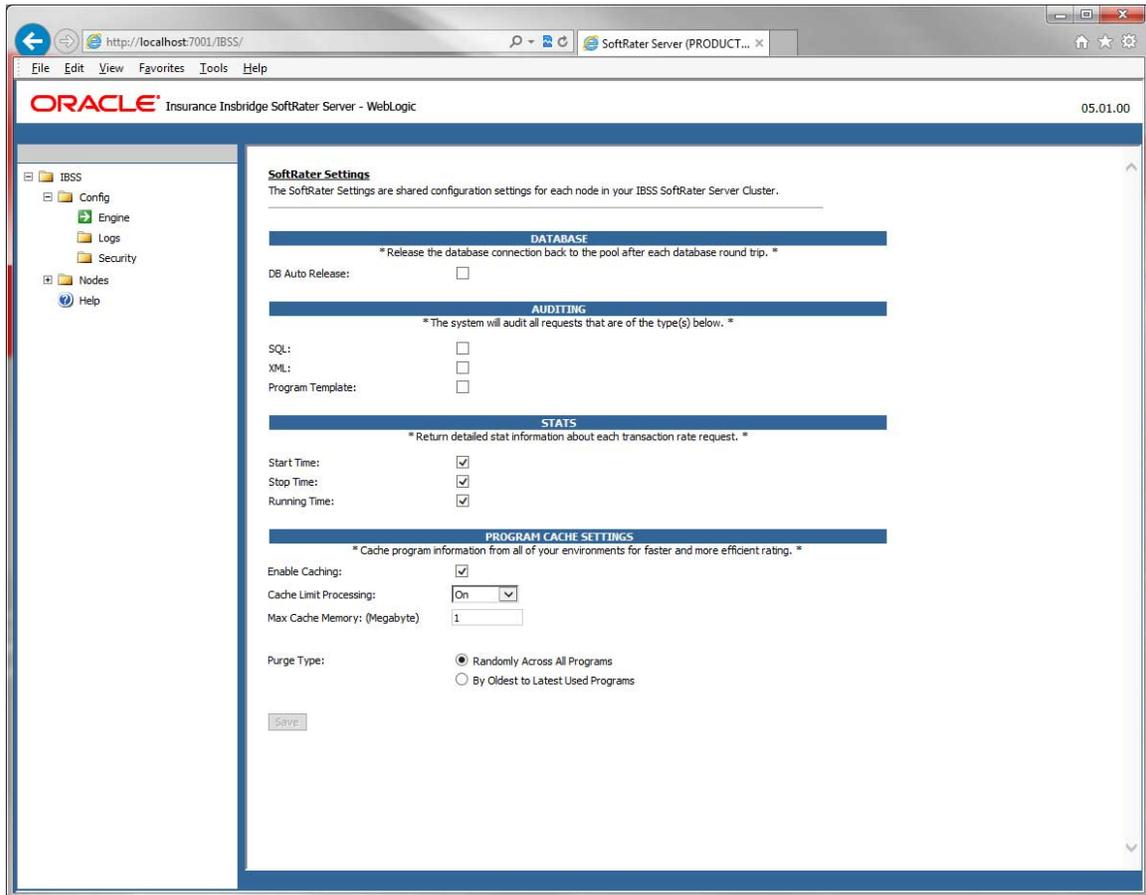


Figure 35 Engine Page

## DB Auto Release

A check in this box enables this feature. If this feature is enabled, the database connections are released as soon as the transaction or request is complete. In the case of a Program to Program (P2P) call, the connection is released as soon as the calling program is finished. If enabled, every time you call the database, a connection will need to be re-opened. This may slow down performance because connections will be opened and closed after each call. You may require this option if you have a limited number of database connections, licensing restrictions, or you are unable to keep connections open.

No check in this box disables this feature. If this feature is disabled, the database connection remains open. You may want keep this feature disabled if you have heavy usage, a large pool of connections, or you are able to keep connections open. Disabling the feature may result in faster performance. However, connections will scale up and down as demand is placed on the DB. If

you have a limited number of connections and heavy demand, disabling DB auto release may not give you the performance increase you need. Pool settings can be set by the DB administrator to allow for a larger connection pool. If disabled at the SoftRater level, on most DB servers, there is a setting that can be used.

DB Auto Release is disabled by default.

## Auditing

Allows you to select what information should be logged for each transaction. These options should typically be left unchecked, unless directed to check them by a member of the Oracle Insurance Support team. Leaving auditing on may result in exceptionally large log files.

**SQL:** The SQL script that was executed. If this option is not selected, this information will still be logged if an error occurs.

**XML:** The XML that was used. If this option is not selected, this information will still be logged if an error occurs.

**Program Template:** Provides an XML view of the entire program that was executed. This information is used to help Oracle Insurance determine why a program is not rating correctly.

---

**NOTE:** *SoftLibrary logging is done on the SoftLibraries page.*

---

## Stats

Allows you to select if and what statistical information is included in the return XML. Any combination of options may be selected. The statistical information is returned in the <stats> node.

**Start:** Time stamp of when rating started. Returned in the <start\_time> node.

**Stop:** Time stamp of when rating finished. Returned in the <stop\_time> node.

**Running:** The **Start Time** minus the **Stop Time**. The result is the length of time rating took, in milliseconds (1000 milliseconds = 1 second). Returned in the <running\_time> node.

---

**NOTE:** *Start Time and Stop Time are shown in microseconds ( $10^{-3}$  seconds), while the Running Time is shown in milliseconds ( $10^{-2}$  seconds).*

---

## Cache Setting

The first time a rate request is sent down, for example, from a policy admin system; the application server that holds the selected rating environment retrieves the requested rate package from the database and stores it in cache. When another rate request is sent down that

utilizes the same package, if it is already stored in cache, the cached package is used. This increases efficiency and allows for rate requests to be returned faster. Packages are cleared out of cache when an updated package is loaded from IBFA or when environments are reset.

The Cache Settings allows you to enable caching. A check indicates the cache is enabled. If cache is not enabled, then the rate package is retrieved from the database every time. This may increase rating times.

The Program Cache Settings allows you to configure the cache used by the server where SoftRater is located.

## Enable Caching

If Enable Caching is checked, then the caching values entered are utilized. If unchecked, caching is disabled and all data (hits and misses) will be purged from the cache.

## Cache Limit Processing:

Cache Limit Processing can be turned on or off as needed. When set to on, you can set the limit with the Max Cache Memory.

## Max Cache Memory

Max Cache Memory places a limit on the amount of cache to be held in memory. If the limit is met prior to any purge interval value, the cache is purged starting with the oldest. The minimum value is 256 mg the maximum value is 32768 mg.

This setting determines the maximum amount of Application Server Memory and VM Instance memory that can be used for engine cache storage. This limit is per JVM. When the Max Limit is reached, an alert is written to a log.

- The values entered are in megabytes (mg).
- Only whole, positive values can be entered.
- The lowest valid number allowed is 256 mg
- The highest valid number allowed is 32768 mg or 32 gigabytes.

If the field is blank, no limit is used. This is the default.

## Purge Type

- **Randomly Across All Programs:** Purges evenly across all programs. This is the default setting. This type of purge removes all cache misses first and then randomly selects and purges cache hits. These steps are repeated until the amount of memory removed is below the maximum allowed.
- **By Oldest to Latest Used Programs:** Purges from the oldest used program to the latest used program. This type of purge creates a sorted list of all cached program versions by last date accessed and removes the oldest first. Prior to any programs being purged,

cache misses are purged. Cache hits are removed randomly. These steps are repeated until the amount of memory removed is below the maximum allowed.

## LOGS

The Logs page is where you can set the log size for error and audit logs. Every node has individual error and audit logs. The size set on the Logs page applies to each node, not to the collective amount between all nodes. For example, if you set a size of 4, then every node will have a log size of 4. The sizes are in MB. If a log file reaches the max size, then log files roll off with the oldest being purged first.

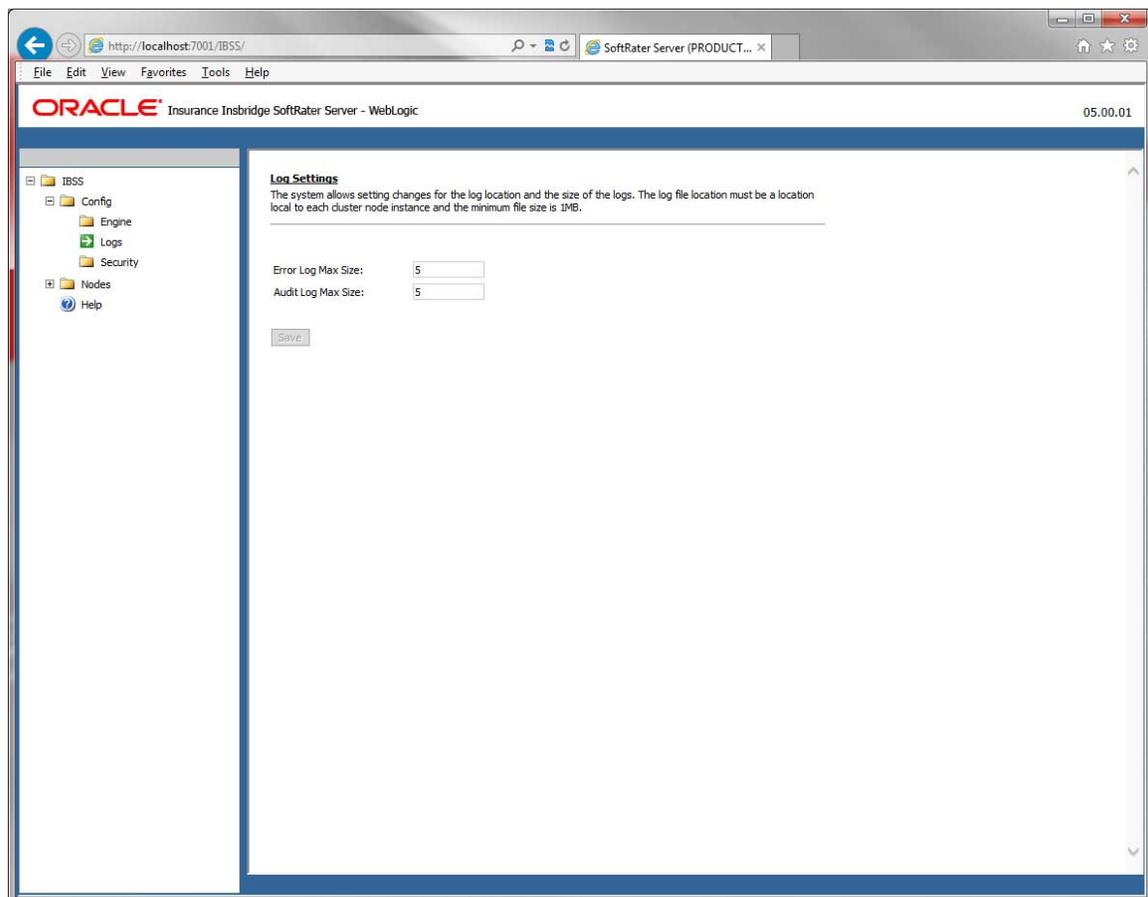


Figure 36 Logs Page

To set the size, enter in a number and click Save. After making a change you must reset the environments for every node in order for the changes to be activated. The option to reset environments for every node is on the Nodes folder. The reset happens immediately.

## SECURITY

The security page is where the administrator can turn on or turn off authentication for IBSS. The default is for security to be on. Security is enabled at installation but can be disabled at a later time. When security is enabled, a login and password will be required. If users do not have a login and password, no section of IBSS will be available to them. If security is disabled, at the next instance of IBSS, no login screen is presented.

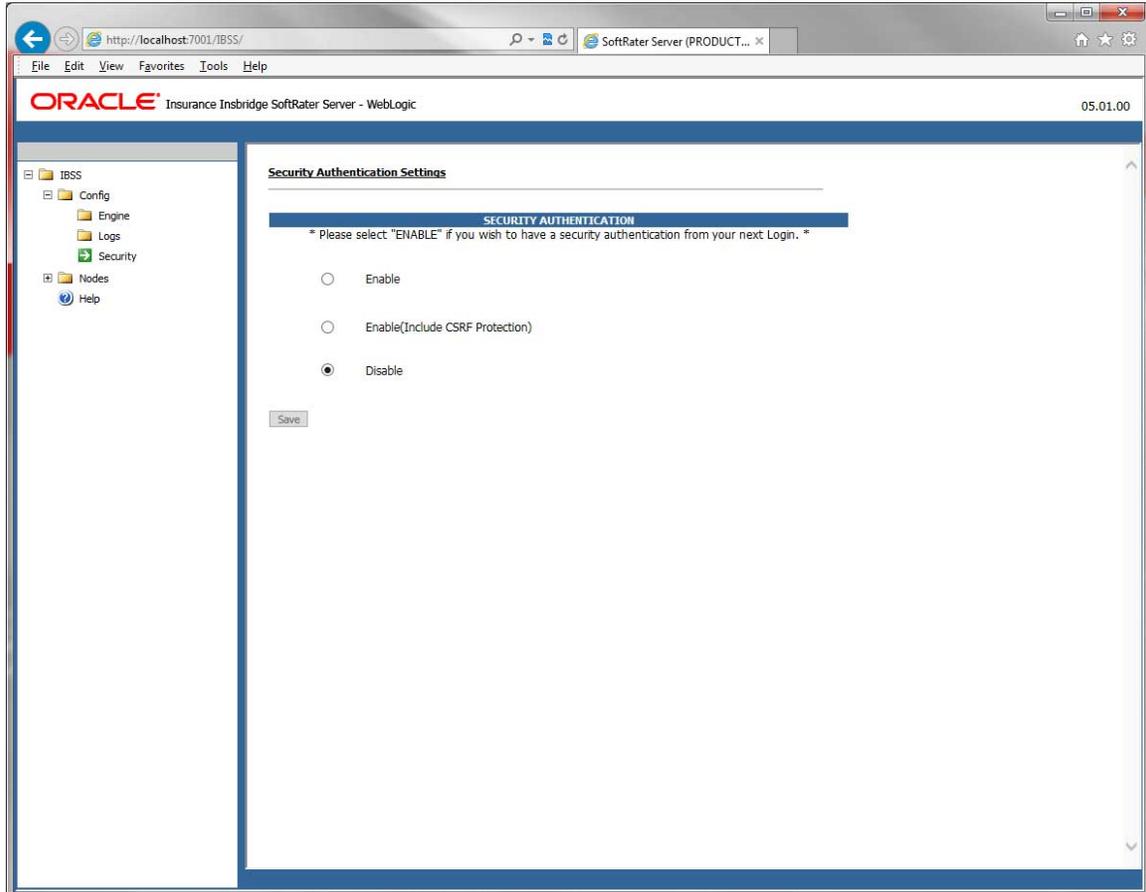


Figure 37 Security Disabled

The Enable (Include CGSF Protection is application security to help protect against a cross site request forgery (CSRF) attack.

## Security Enabled

Security is enabled by default; users are presented with a login screen. A user name and password must be entered to gain access. Information regarding the status of the system is presented but will not be accessible. The default is for security to be enabled.

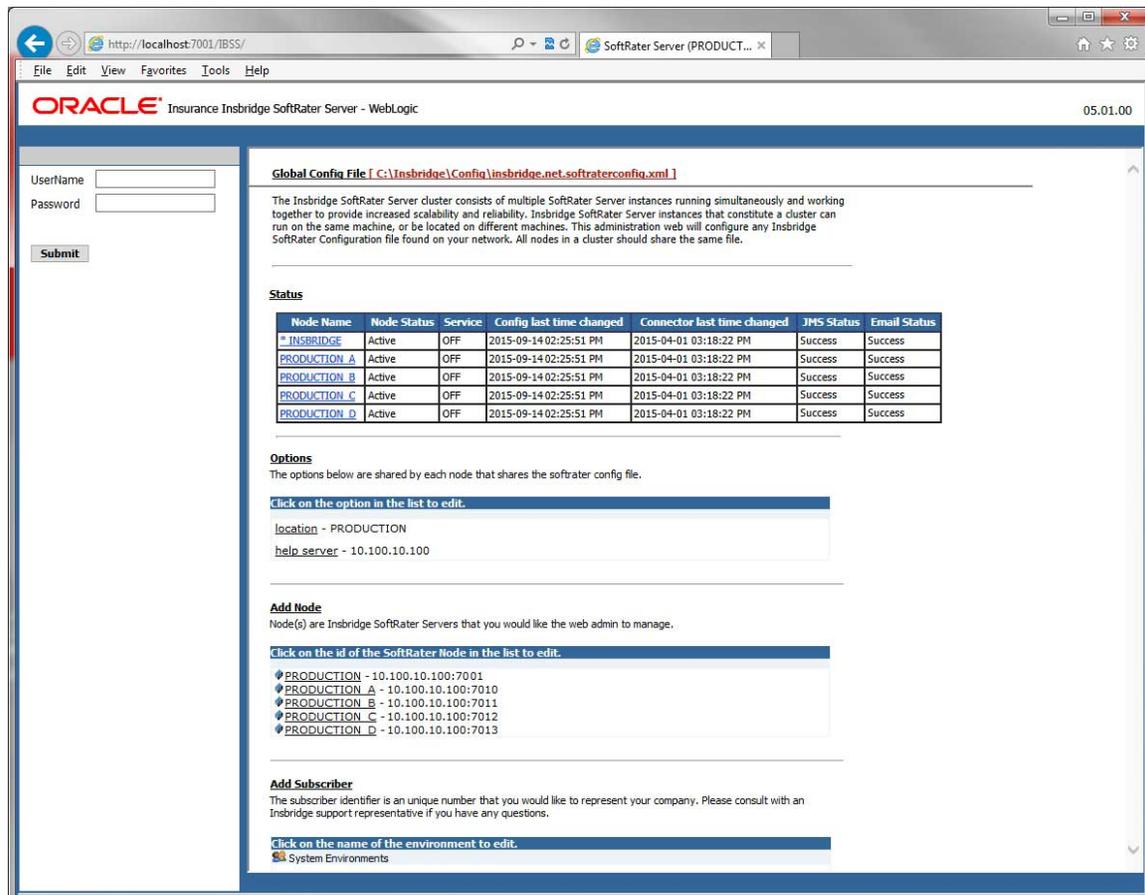


Figure 38 Security Enabled in IBSS

When Security is enabled, a default user "admin" with a default password of "insbridge" is assigned. This is the user name and password to be used the first time you enter IBSS. It is strongly recommended that the password be updated at the first log in.

## Logging Out

A Logout option is presented when security is enabled.

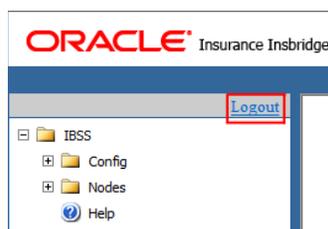


Figure 39 Logging Out of IBSS

Users should log out of IBSS when finished. The Logout option is at the top of the side menu. If IBSS closes, the session may not close, leaving the user logged in. If the Logout option is not present, security is not enabled.

## Change Password

The Change Password screen is available only when security has been enabled.

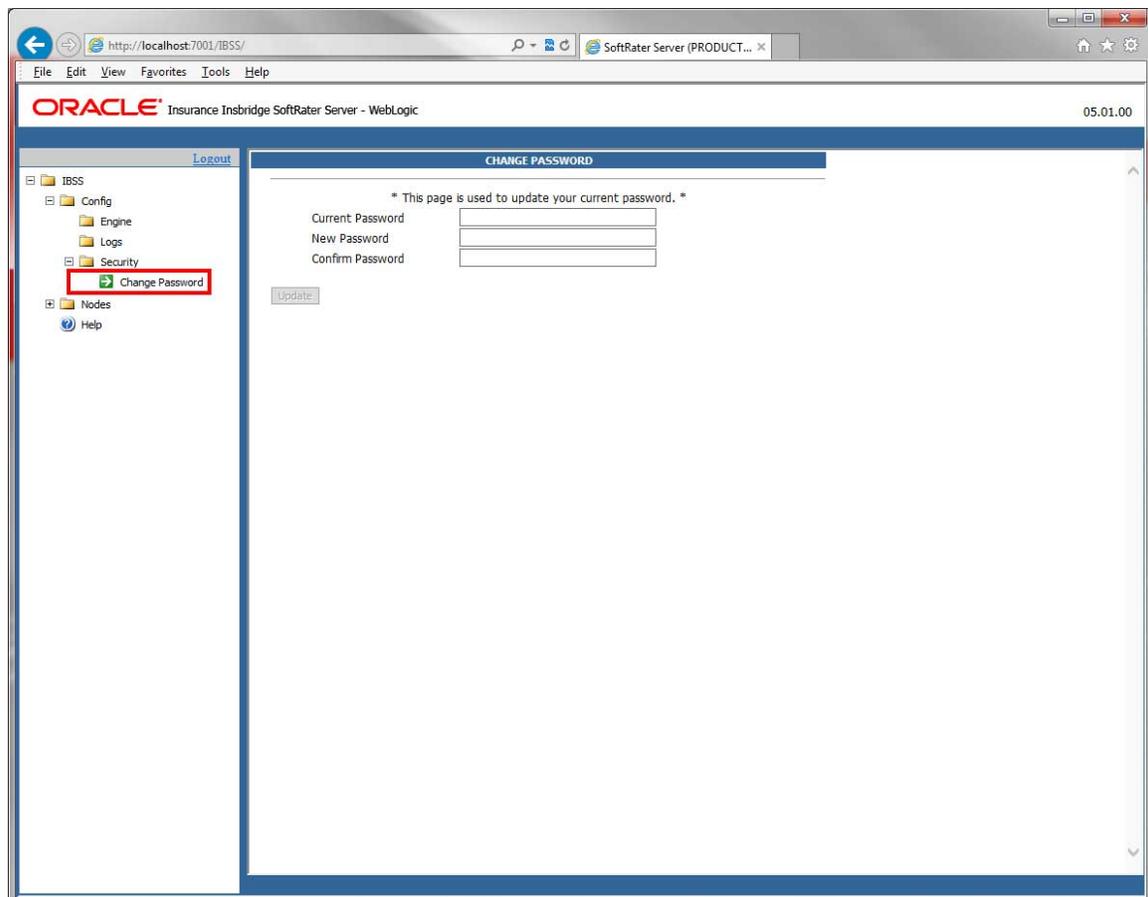


Figure 40 Changing Password

### Changing Default Password for Security Authentication

1. From the IBSS home page, navigate to security.
2. Under the security menu, select the option to Change Password. The Change Password screen is displayed.
3. Enter the default password in the Old Password field.
4. Enter a password of your choosing in the New Password and Confirm Password fields. Passwords should be between 5-12 characters.
5. Click Update to update your password.

6. After changing your password you must reset the environments for every node in order for the changes to be activated. The option to reset environments for every node is on the Nodes folder. The reset happens immediately.

### **Password Rules and Behavior**

- If the length of the password entered in any field is less than 5 characters, the error message “**Password length should be between 5-12 characters**” is displayed next to the corresponding text field.
- The Update button gets enabled only when all the three fields are populated.
- If the values entered in the New Password and Confirm Password fields do not match then error message “**Passwords do not match.**” is displayed in the screen.
- When the mandatory fields are updated, the password value is encrypted.

### **Resetting the Password**

For security purposes, information regarding resetting a lost or forgotten password is not included in this help document. For information regarding these, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.

## NODES

The nodes folder holds the shared functionality available to all nodes and the details and functionality available to each individual node. To view the details of an individual node, expand the Nodes folder and select the node where you want to view or edit details.

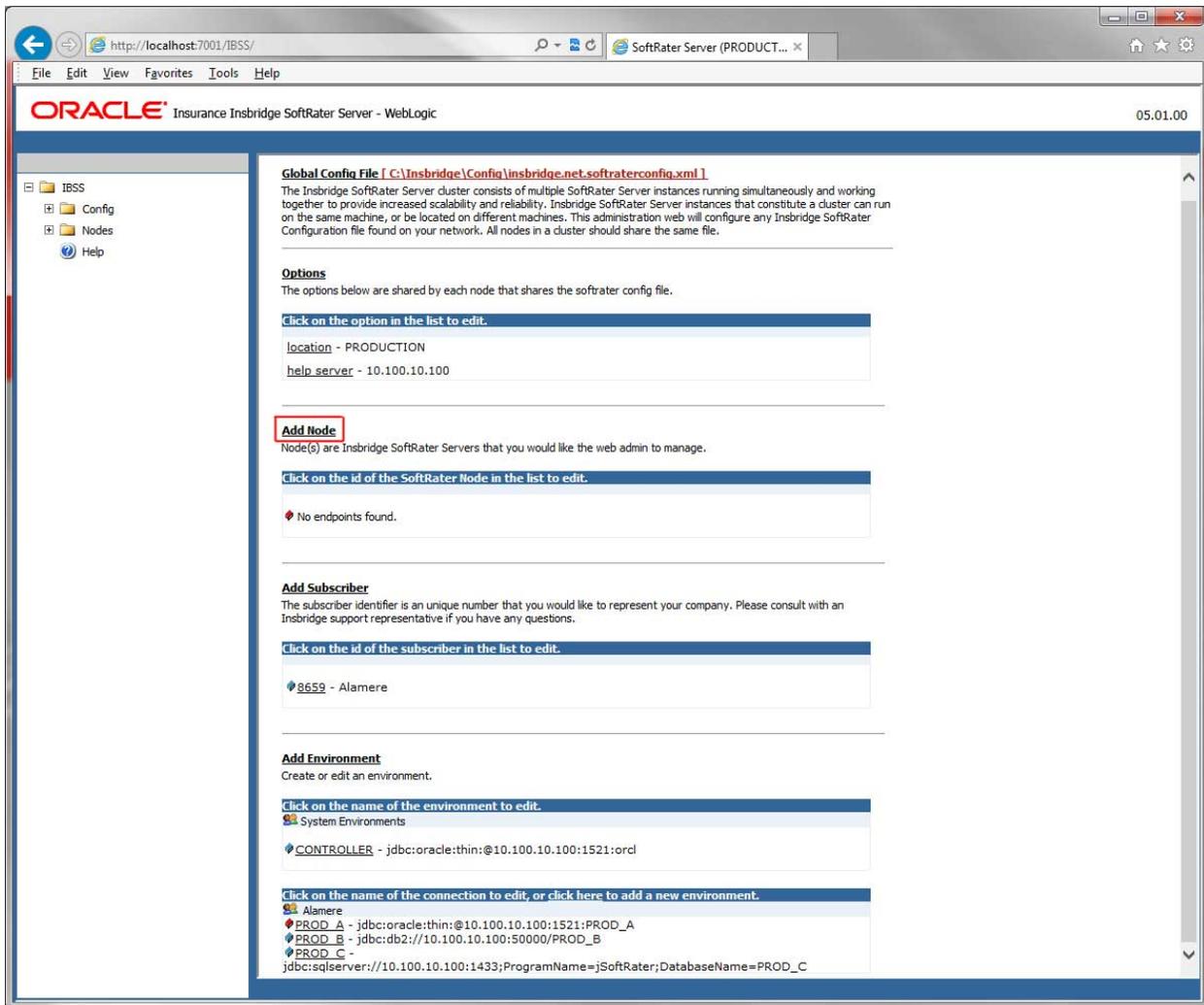


Figure 41 Node Management Window

To view the options that apply to every node in the cluster, select the Nodes folder and the underlying folders. The available options are:

- **Resetting Environments for every node:** Resets the environment for every node in the cluster.
- **Inbridge Connector Service:** Get status and set properties for every node in the cluster.
- **Services:** Manage Inbridge Connector Service, Message Process and Inbridge Task Manager.
- **SoftRater:** Test input files against loaded packages.

- **SoftData:** Test SoftData requests.
- **DBRuntime:** Test DBRuntime requests.
- **SoftLibraries:** Manage SoftLibraries.

## Reset Environments

The option to reset environments for every node is on the Nodes folder. Resetting environments reloads the config.XML file. Environments may need to be reset to activate changes. Changes do not take effect until the SoftRater configuration XML file is reloaded. The reset happens immediately.

**NOTE:** *Resetting environments causes all information in the cache to be purged and any transactions currently processing could be made invalid.*

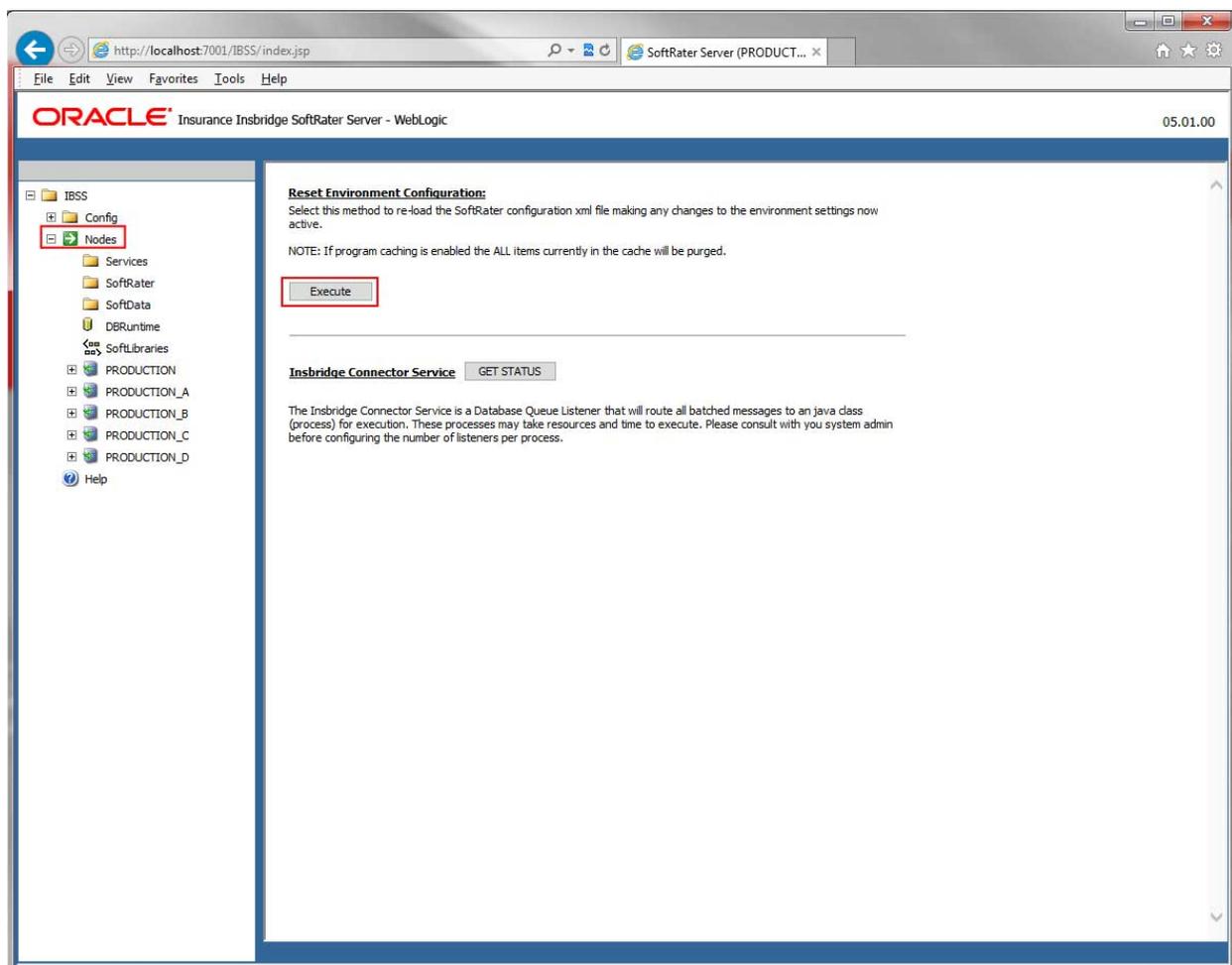


Figure 42 Resetting a Node

1. Click the Execute button. A confirmation window is displayed.

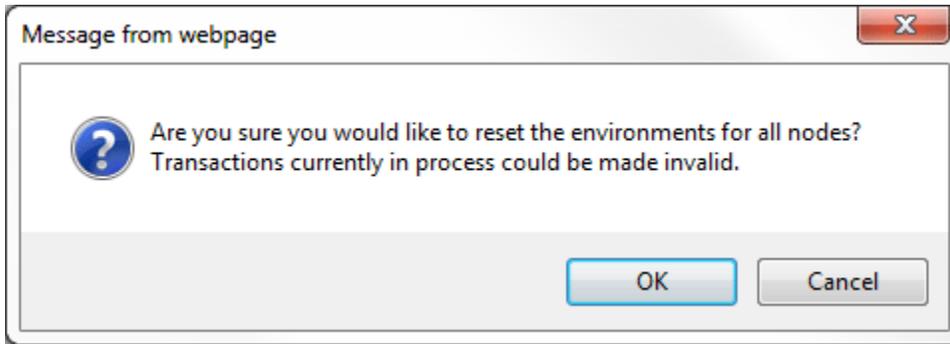


Figure 43 Confirming a Node Reset

2. Click OK to reset the environment. Click Cancel to return to the previous screen. No action will be taken.
3. The screen refreshes and the environments have been reset.
4. Confirmation is displayed with a success or fail message.

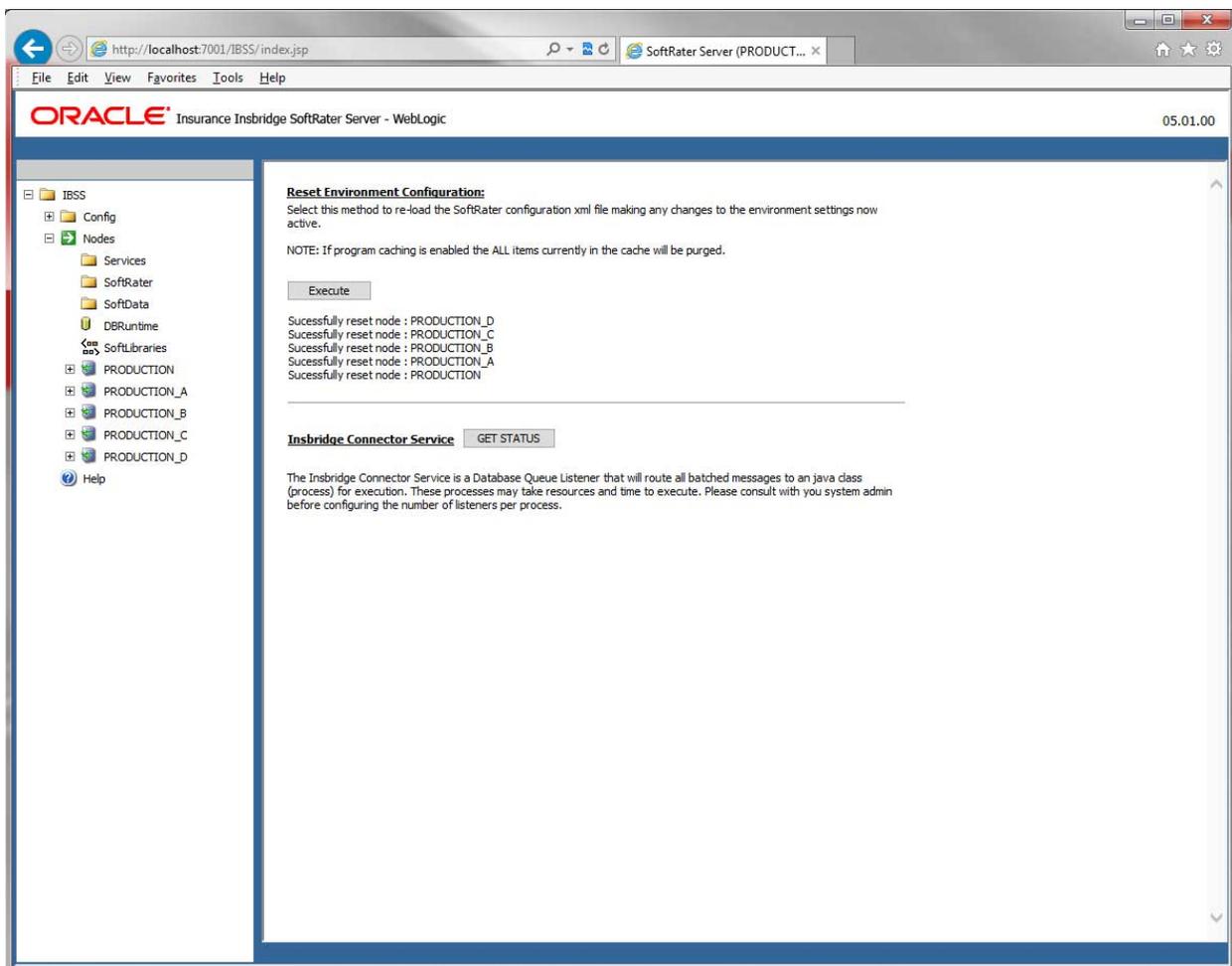


Figure 44 Successful Reset

## Insbridge Connector Service

The Insbridge Connector Service is a database queue listener that routes all batched messages to a java class process for execution. The Insbridge Connector Service on the Nodes page is where you can get the status for every node in the cluster.

The screenshot shows the Oracle Insurance Insbridge SoftRater Server - WebLogic interface. The left sidebar contains a tree view with folders for IBSS, Config, Engine, Logs, Security, Nodes, Services, SoftRater, SoftData, DBRuntime, SoftLibraries, INSRIDGE, PRODUCTION\_A, PRODUCTION\_B, PRODUCTION\_C, and PRODUCTION\_D. The main content area displays the 'Insbridge Connector Service' page. It features a 'Reset Environment Configuration' section with an 'Execute' button and a 'GET STATUS' button. Below the 'GET STATUS' button is a table showing the status of various nodes.

| Node Name    | Node Status | Service | Config last time changed | Connector last time changed | JMS Status | Email Status |
|--------------|-------------|---------|--------------------------|-----------------------------|------------|--------------|
| * INSRIDGE   | Active      | OFF     | 2015-09-14 02:25:51 PM   | 2015-09-14 03:43:16 PM      | Success    | Success      |
| PRODUCTION_A | Active      | OFF     | 2015-09-14 02:25:51 PM   | None                        | Error      | Error        |
| PRODUCTION_B | Active      | OFF     | 2015-09-14 02:25:51 PM   | None                        | Error      | Error        |
| PRODUCTION_C | Active      | OFF     | 2015-09-14 02:25:51 PM   | None                        | Error      | Error        |
| PRODUCTION_D | Active      | OFF     | 2015-09-14 02:25:51 PM   | None                        | Error      | Error        |

Figure 45 Insbridge Connector Service

Clicking the Get Status button returns the status of every node. The statuses are active, not active, or unable to start. Check Nodes that cannot be started to make sure they are active. Only active nodes can be started.

Other information on the page is the time stamp for the last time the config was reset, and the last time the Connector was changed. JMS and email status are also listed.

An asterisk ( \* ) at the front of the node name indicates the node you are currently on.

## SERVICES

The Nodes Services page allows you to start and stop the Inbridge Connector Service, view messages, and enter properties for Inbridge Task Manager. The properties entered here apply to every node in the cluster.

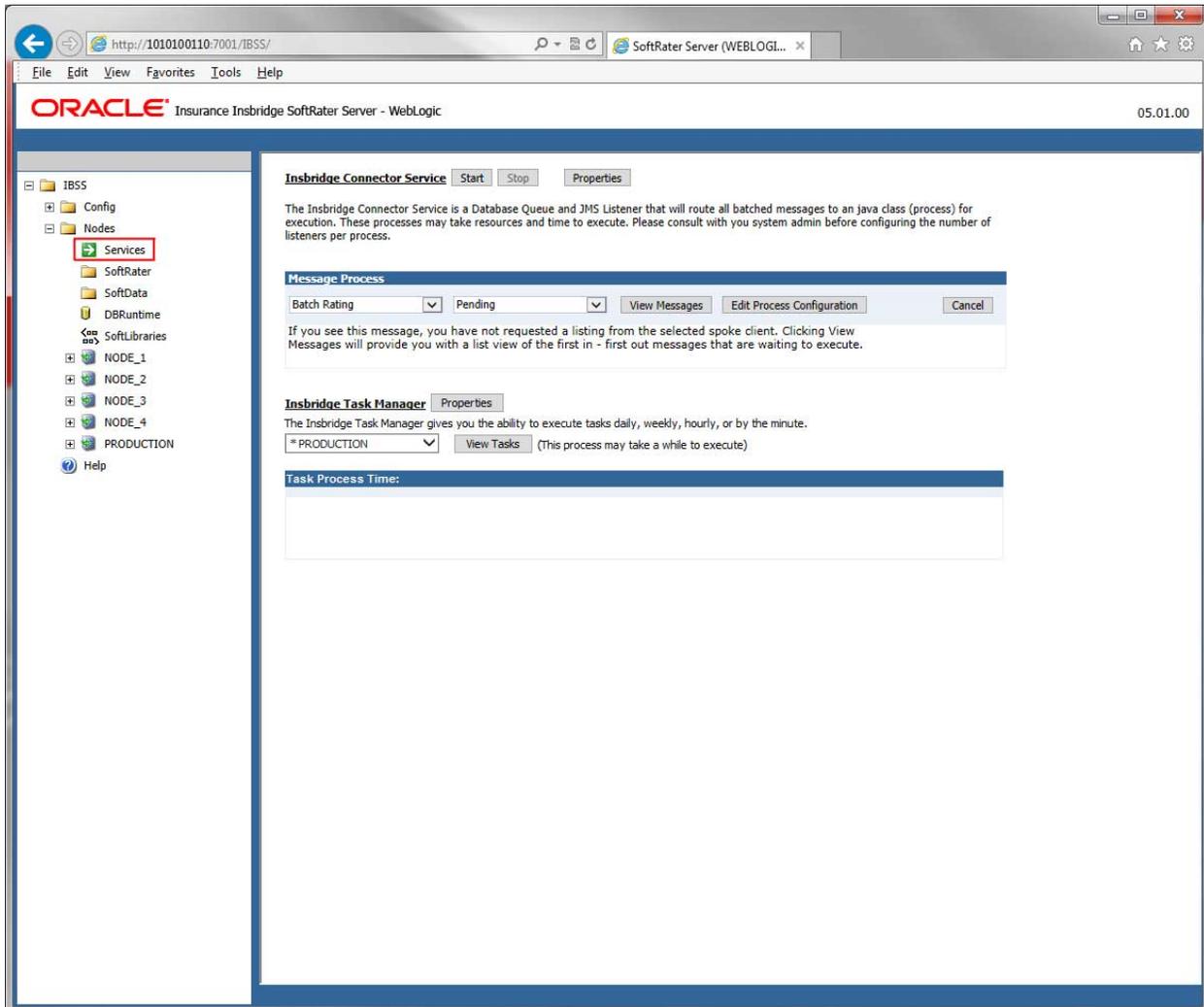


Figure 46 Nodes Services

### Inbridge Connector Service

The Inbridge Connector Service is a Database Queue and JMS Listener that routes all batched messages to a java class (process) for execution. The Inbridge Connector Service has three buttons:

- **Start:** Starts all the connector services for every node in the cluster. Only active nodes can be started.
- **Stop:** Stops all connector services for every node in the cluster. Only active nodes can be stopped.

- **Properties:** Sets the connection service properties for every node in the cluster.

## Setting Insbridge Connection Properties

The Insbridge Connector Service is a database queue listener that routes all batched messages to a java class process for execution. Properties must be set up prior to using. There are three areas that should be completed. The first area sets the number of jobs and the number of threads per job. The next area is for notifications. Notification details need to be configured in order to receive the email response for successful/failed batch transactions. The third area is required for batch and is where JMS settings are entered.

1. Locate the Services screen under the Nodes options. IBSS > Nodes > Services.

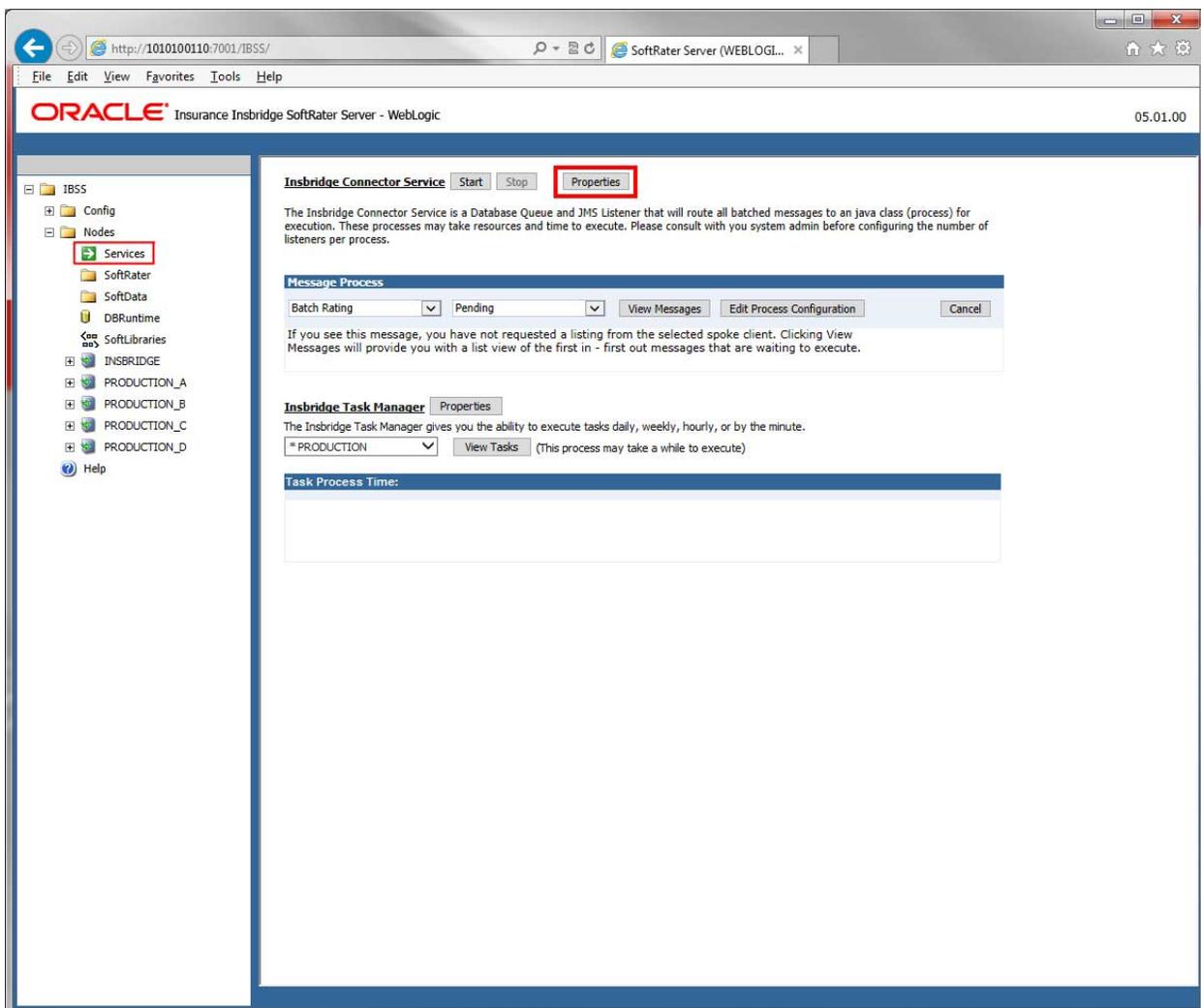
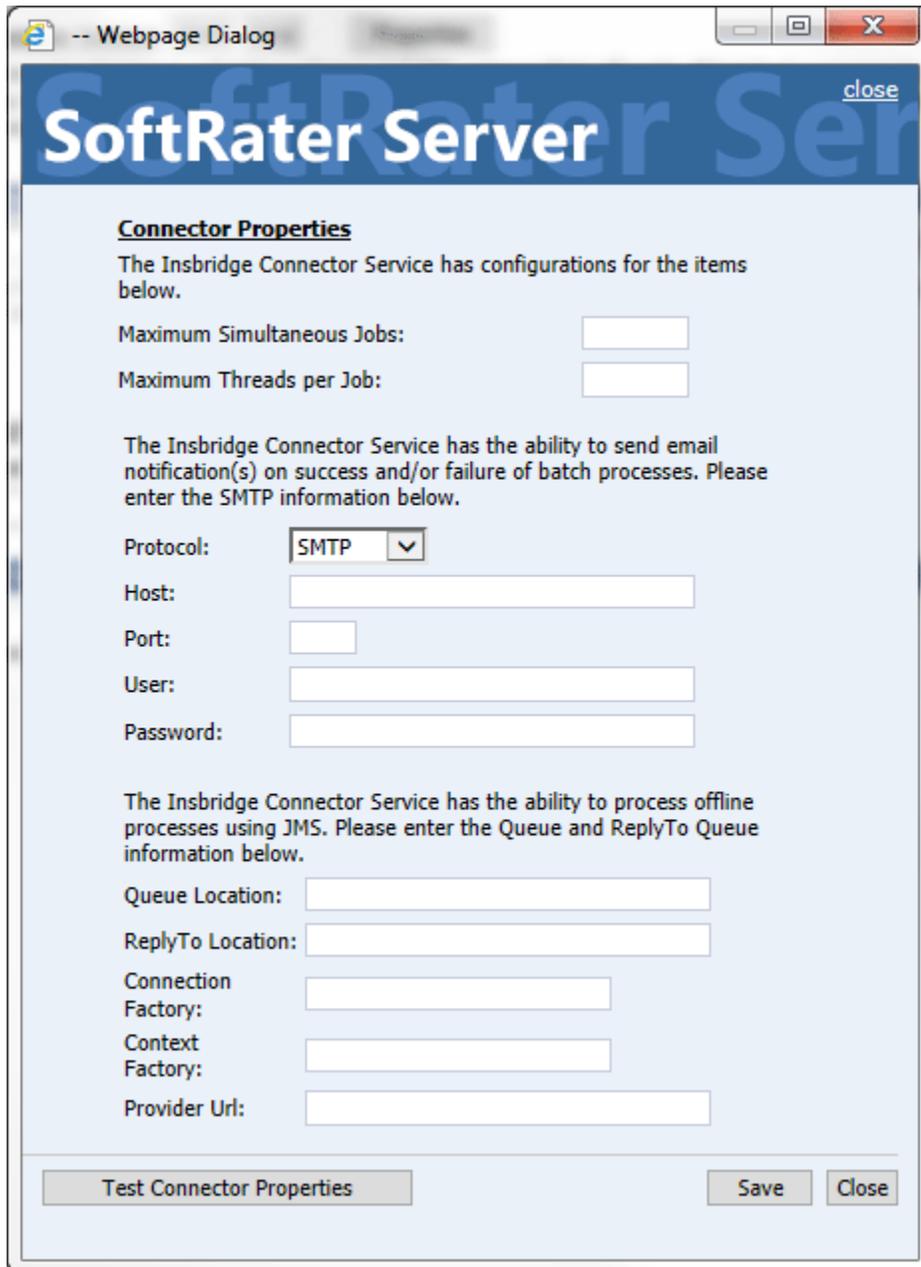


Figure 47 Properties Button on Services Page

2. Click Properties. A separate screen is displayed.
3. Enter values for the Insbridge Connector Service.

## Configuring Threading in IBSS:

The Maximum Simultaneous Jobs entry is where the IBSS system administrator can enter in the number of jobs to be run by the system. The Maximum Threads per Job is the maximum number of threads that need to be executed. Threading can be set to any number required and applies to every job. So if you have 5 jobs and ten threads per job, you will have a total availability of fifty threads.



The screenshot shows a web browser window titled "-- Webpage Dialog" displaying the "SoftRater Server" configuration page. The page has a blue header with the "SoftRater Server" logo and a "close" button. The main content area is titled "Connector Properties" and contains several sections of configuration options:

- Connector Properties:** A section with the text "The Insbridge Connector Service has configurations for the items below." followed by two input fields: "Maximum Simultaneous Jobs:" and "Maximum Threads per Job:".
- SMTP Configuration:** A section with the text "The Insbridge Connector Service has the ability to send email notification(s) on success and/or failure of batch processes. Please enter the SMTP information below." followed by a "Protocol:" dropdown menu set to "SMTP", and input fields for "Host:", "Port:", "User:", and "Password:".
- JMS Configuration:** A section with the text "The Insbridge Connector Service has the ability to process offline processes using JMS. Please enter the Queue and ReplyTo Queue information below." followed by input fields for "Queue Location:", "ReplyTo Location:", "Connection Factory:", "Context Factory:", and "Provider Url:".

At the bottom of the form, there are three buttons: "Test Connector Properties", "Save", and "Close".

Figure 48 Insbridge Connection Properties

Enter the values and click save. The Test Connector Properties does not return a response for thread values.

---

**WARNING:** Before changing the number of threads, you should consult with your system administrator. Setting the number too high can result in poor performance or even a system crash. If you are unsure of how many threads to use, set the number to 1. For single processor systems, Insbridge recommends a maximum of 2 threads.

---

Thread and job settings are not required. A default of 1 is used if no entry is made.

### Configuring Email Communication in IBSS:

The second segment holds email notification information that is used for batch. This is the email that is used when email notification is requested for a batch. The service cannot send notification emails until that information is entered and verified.

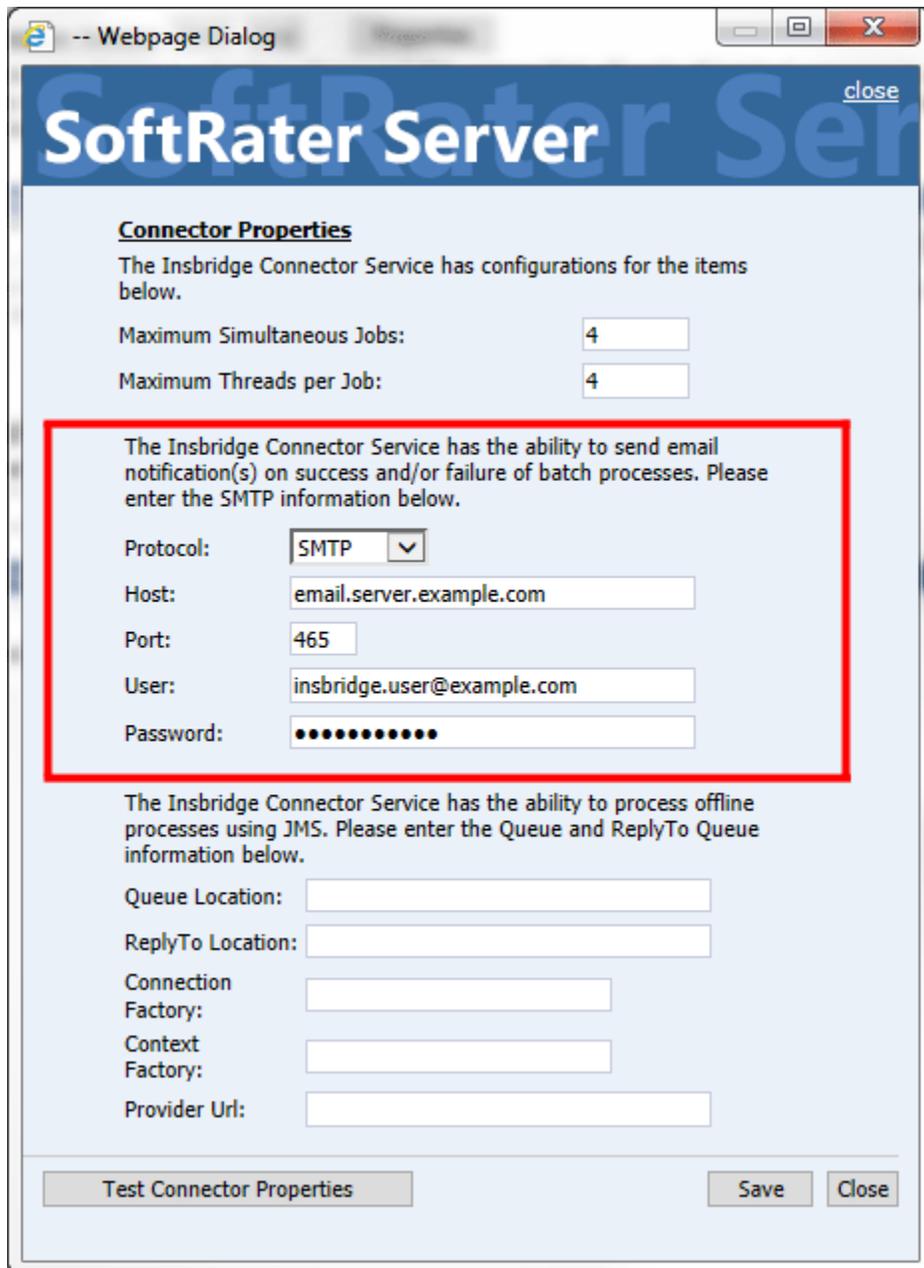


Figure 49 Insbridge Connection Properties for Email

1. All fields require an entry. Enter values for:
  - **Protocol** - SMTP or SMTPS or JNDI
  - **Host** - email host
  - **Port** - port used

- **User** - Login id
  - **Password** - Password
2. Click **Save**.
  3. Click **Test Connector Properties!** to verify your entry. A successful connection will be displayed if the email was sent. The recipient also receives a message in their email. A failed connection message is displayed if a connection cannot be made. Please see logs for more details.

## Configuring JMS in IBSS:

JMS must be setup in the application server prior to entering queue details. JMS is required for async batch processing. Batches can be set to run asynchronously. If you select to run a batch asynchronously the batch runs in the background and, optionally, notifies the email address entered on the Explorer page when the action is complete.

The screenshot shows a web browser window titled "Webpage Dialog" displaying the "SoftRater Server" configuration page. The page is divided into two main sections. The first section, "Connector Properties", explains that the Insbridge Connector Service has configurations for the items below. It includes two input fields: "Maximum Simultaneous Jobs" with the value "4" and "Maximum Threads per Job" with the value "4". The second section explains that the service can send email notifications and asks for SMTP information. It includes a dropdown menu for "Protocol" set to "SMTP", and input fields for "Host" (email.server.example.com), "Port" (465), "User" (insbridge.user@example.com), and "Password" (masked with dots). Below this, a red box highlights the "JMS Properties" section, which explains that the service can process offline processes using JMS and asks for queue information. It includes input fields for "Queue Location" (jms/RequestQueue), "ReplyTo Location" (jms/ReplyToQueue), "Connection Factory" (jms/ConnectionFactory), "Context Factory" (weblogic.jndi.WLInitialContextF), and "Provider Url" (t3://localhost:7001). At the bottom of the window, there are three buttons: "Test Connector Properties", "Save", and "Close".

Figure 50 Insbridge Connection Properties for JMS

1. All fields are required in order to configure queues:
  - **Queue Location** - JNDI Name of the Request Queue

- **ReplyTo Location** - JNDI Name of the Reply To Queue
  - **Connection Factory** - JNDI Name of the Queue Connection Factory
  - **Context Factory** - com.ibm.websphere.naming.WsnInitialContextFactory
  - **Provider URL** - iiop://<machine\_ip\_address>:<server\_bootstrap\_address>
2. Click Save
  3. Click **Test Connector Properties!** to verify your entries.

## Test Connector Properties

Verify your entries prior to using.

A successful setup returns a success message.

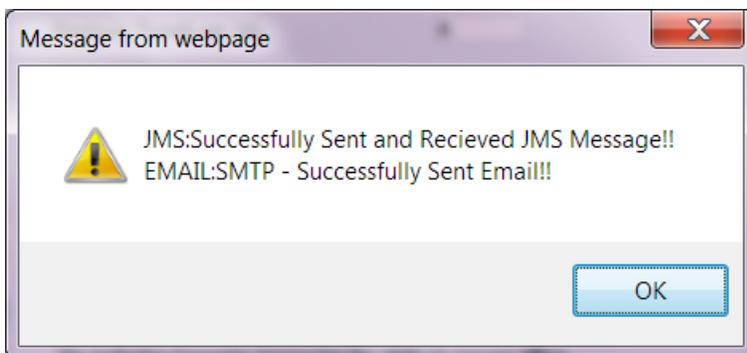


Figure 51 Successful Insbridge Connection Properties Setup

This message means that the JMS Connection was successful, and a sample mail will be sent to the email ID that is configured in the properties.

A message failure indicates where the message failed.

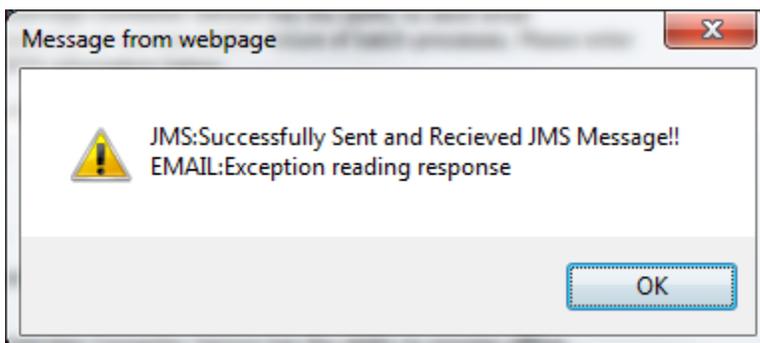


Figure 52 Failed Insbridge Connection Properties Setup

In this example, no SMTP server was set up on the server.

## Starting and Stopping Inbridge Connection Properties

After configuring the Inbridge Connector Properties, you can start the service by clicking the Start button. A status for each node is displayed.

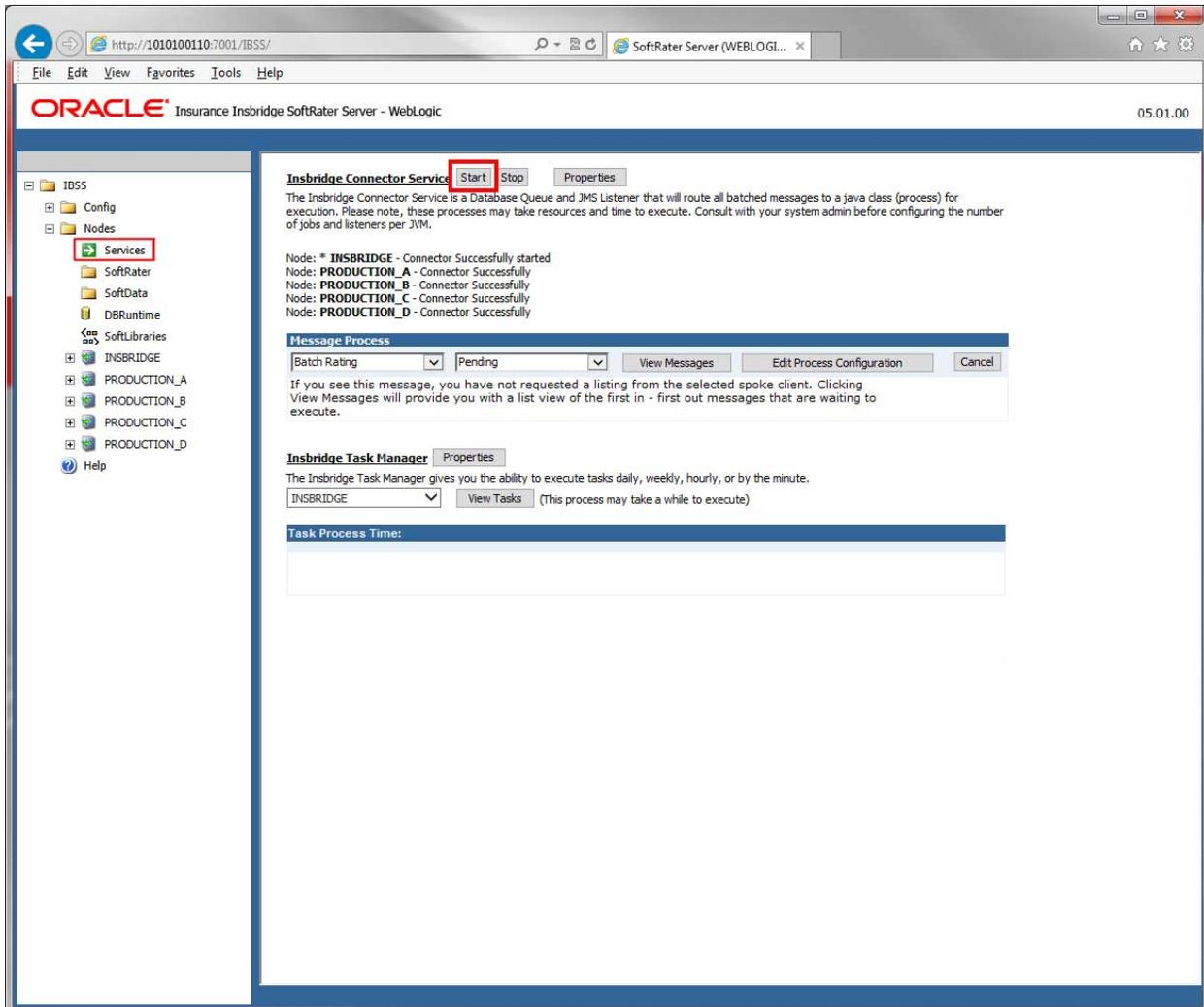


Figure 53 Services page with Services Started

Only active nodes can be started. If a node cannot be started, an error message will be displayed.

## Message Process

The Message Process is a queue and database listener for Batch and Impact Analysis requests. The Message Process listens to the JMS Request Queue and the JMS Response Queue for JMS Request and JMS Response messages. The Message Process also listens to the Assembly Process Table for Batch and Impact Analysis requests. Each queue operates on a first-in, first-out basis. This allows you to keep track of the requests that are submitted to the engine for rating. Various request types like Batch Rating, Impact Analysis, JMS Request, and JMS Response messages can be viewed in the Message Process option.

You can view or get the status of the request, cancel the request before the engine picks it up for processing, abort a request that is processing, and purge the completed/failed/cancelled/aborted requests.

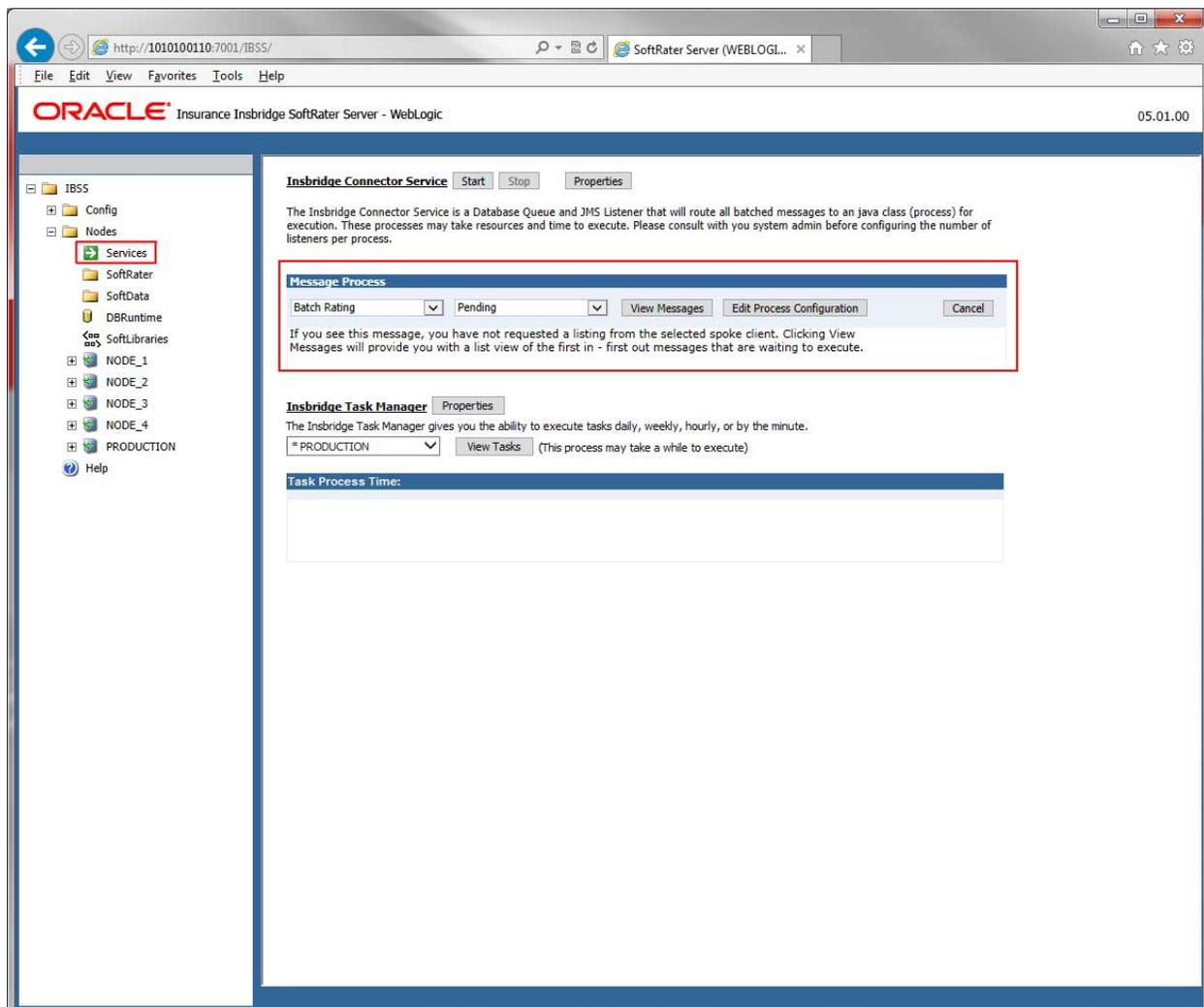


Figure 54 Batch Message Information

1. Navigate to the **Services** page.
2. Select the appropriate option.

- Batch Rating
  - Impact Analysis
  - Broker - Request
  - Broker - Response
3. Select the status.
    - Pending
    - Processing
    - Completed
    - Failed
    - Canceled
    - Aborted
  4. Click View Messages.
  5. The listing shows any messages that are currently in the queue.
  6. To view details on a specific message, click the underlined portion. Information about the message opens in a separate window.
  7. To perform an action, click the button at the end of the section.

## Statuses and Actions for Message Processing

Use Message Processing to keep track of the requests that are submitted to the engine for rating. The action you can take depends on the status selected.

| Status Dropdown                             | Button Action |
|---|---------------|
| Pending                                     | Cancel        |
| Processing                                  | Abort         |
| Completed<br>Failed<br>Cancelled<br>Aborted | Purge         |

### Statuses

Available statuses of a request after submitting to the engine:

- Pending** A request is first submitted to the engine with the status pending. This means that the engine has not picked up this request for processing. Pending requests can be canceled.
- Processing** As soon as the engine picks up the request, the status changes to processing. Requests that are in processing status can be aborted.

|                  |  |
|------------------|--|
| <b>Completed</b> | After the engine has successfully processed a rate request, the status of the request changes to completed. A completed request message can be purged.   |
| <b>Failed</b>    | If any error is encountered while processing the request, the status changes to failed. Details of the exception can be found in the corresponding logs. A failed request message can be purged.   |
| <b>Cancelled</b> | After a request is submitted, you can cancel the request before it is picked up by the engine. This action changes the status from pending to cancelled. A cancelled request message can be purged.  |
| <b>Aborted</b>   | Requests cannot be cancelled after being picked up by the engine. If the request is in a processing state, it can be aborted. Aborting a request stops the request prior to being completed. This changes the status from processing to aborted. An aborted request message can be purged. |

Failed, cancelled, and aborted requests will not be picked up by the engine for processing. The request has to be submitted again in order to be processed.

## Actions

The action you can take depends on the status selected. After the status is selected, the button at the end of the section is updated with the corresponding action.

|               |  |
|---------------|--|
| <b>Cancel</b> | To cancel a request that has been submitted but not processed, select Pending as the status, then select the request you want to cancel and click Purge. This stops the request from being processed. A message is displayed that confirms this is the action you want to take.      |
| <b>Abort</b>  | To stop a request that is currently being processed, select Processing as the status, then select the request you want to stop and click Abort. This stops the request from being processed. A message is displayed that confirms this is the action you want to take.               |
| <b>Purge</b>  | To remove a message from the listing, select Completed, Failed, Cancelled or Aborted as the status, then select the message you want to remove and click Purge. This removes the message from the listing. A message is displayed that confirms this is the action you want to take. |

Purging a request removes all details corresponding to the selected request from the database/queue.

## Edit Process Configuration

This option is where you enter the emails addresses where system notifications should be sent. Multiple names should be separated by a semicolon ( ; ).

1. Locate the Services screen under the Nodes options. IBSS > Nodes > Services.

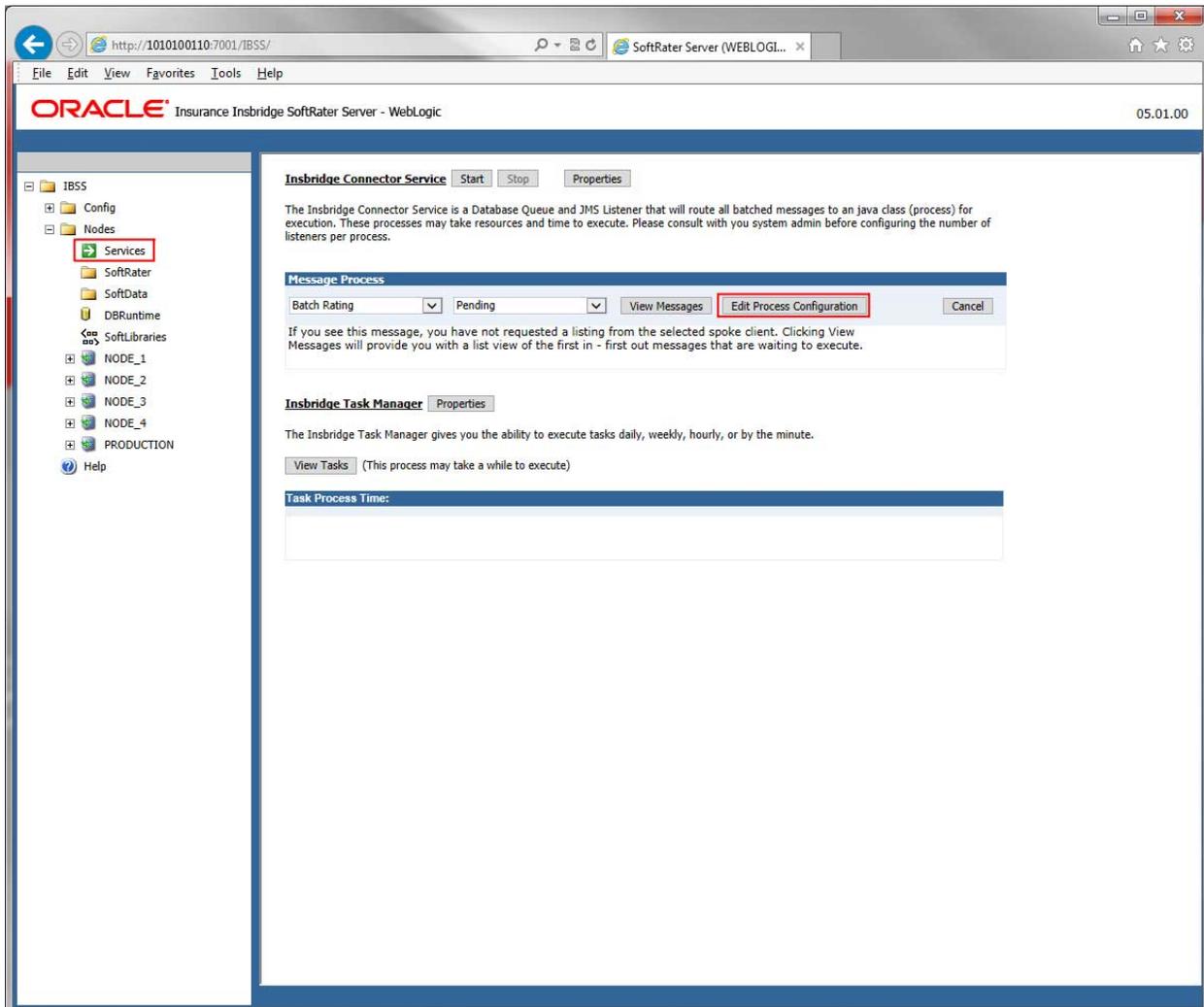


Figure 55 Edit Process Configuration Services

2. Click Edit Process Configuration. A separate screen is displayed.
3. Enter the email address to be used by the Insbridge Connector Service.



Figure 56 SoftRater Batch Engine Admin Email

4. Click Save.

## Insbridge Task Manager

The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status. Tasks listed here are system tasks and generally are not changed or altered once in place.

**NOTE:** When viewing tasks, the asterisk ( \* ) indicates the node you are currently on.

## Setting Insbridge Task Properties

The properties set here apply to every node in the cluster. All intervals are in milliseconds.

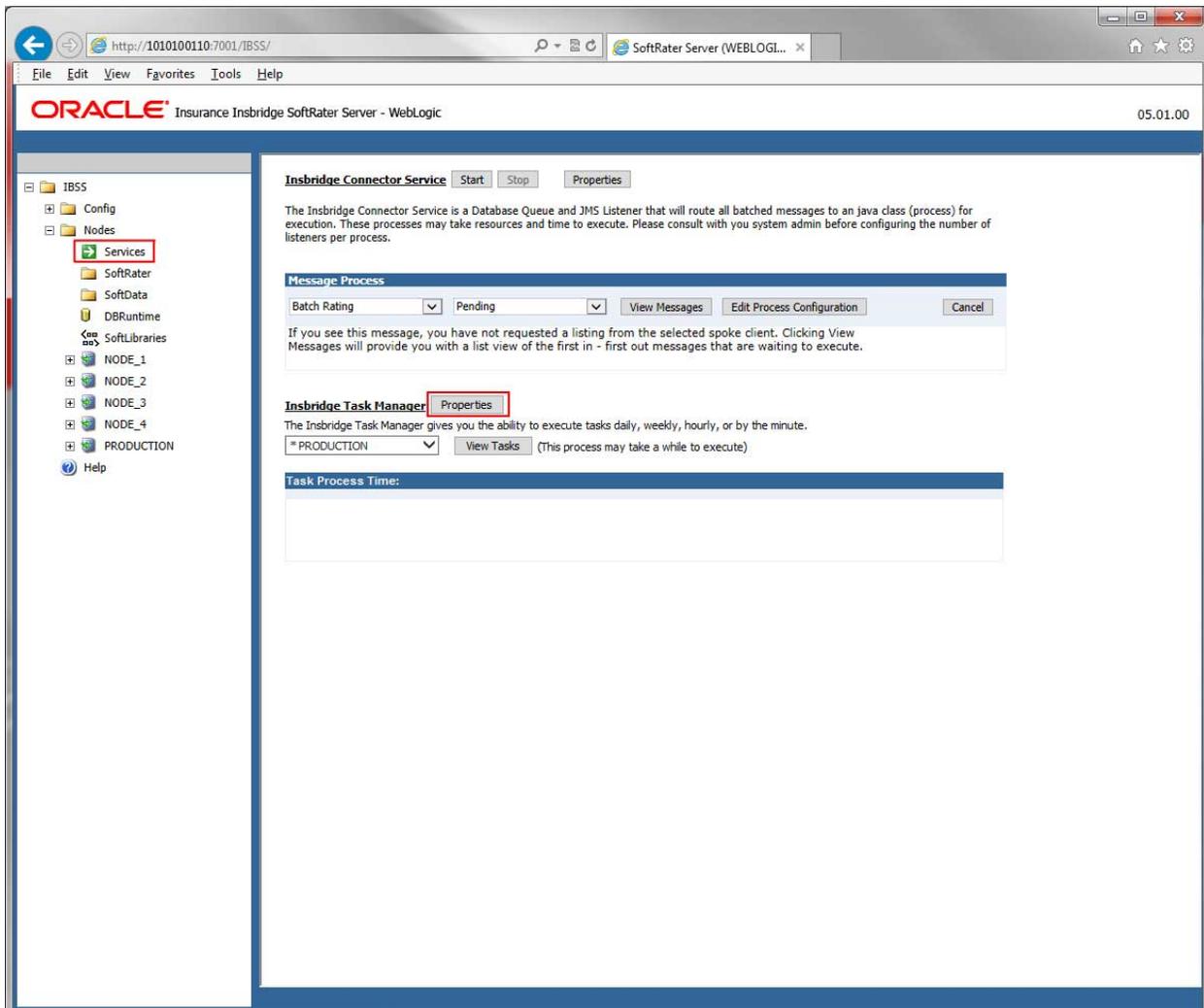


Figure 57 Setting Task Manager Properties

To set properties, click the properties button. A separate screen is displayed.

**Task Interval Properties (milliseconds)**

The Task Manager properties will allow the customer to configure when tasks should run on a particular cluster. These settings are shared with all nodes that share the same Insbridge Config file.

|                              |   |
|------------------------------|---|
| Project Temp File Cleanup:   | Threads: <input type="text" value="1"/>         |
|                              | Interval: <input type="text" value="86400000"/> |
| Delete Processed Requests:   | Threads: <input type="text" value="1"/>         |
|                              | Interval: <input type="text" value="86400000"/> |
| Process Async JMS Requests:  | Threads: <input type="text" value="1"/>         |
|                              | Interval: <input type="text" value="300000"/>   |
| Process Pending Requests:    | Threads: <input type="text" value="1"/>         |
|                              | Interval: <input type="text" value="10000"/>    |
| Cache Threshold Max Watcher: | Threads: <input type="text" value="1"/>         |
|                              | Interval: <input type="text" value="900000"/>   |
| Add Result To DB:            | Threads: <input type="text" value="1"/>         |
|                              | Interval: <input type="text" value="300000"/>   |

Save Close

Figure 58 Task Manager

Enter the properties for:

- Project Temp File Cleanup:
- Delete Processed Requests:
- Process Async JMS Requests:
- Process Pending Requests:
- Cache Threshold Max Watcher:
- Add Result to DB:

## Viewing Task Details

To view the currently scheduled tasks, click View Tasks and the tasks are listed. The View Tasks option lists all the tasks running for a particular node with the details of the Task Name, Interval between each execution, Last Runtime, and Next Runtime. This feature also details when the next task execution should take place.

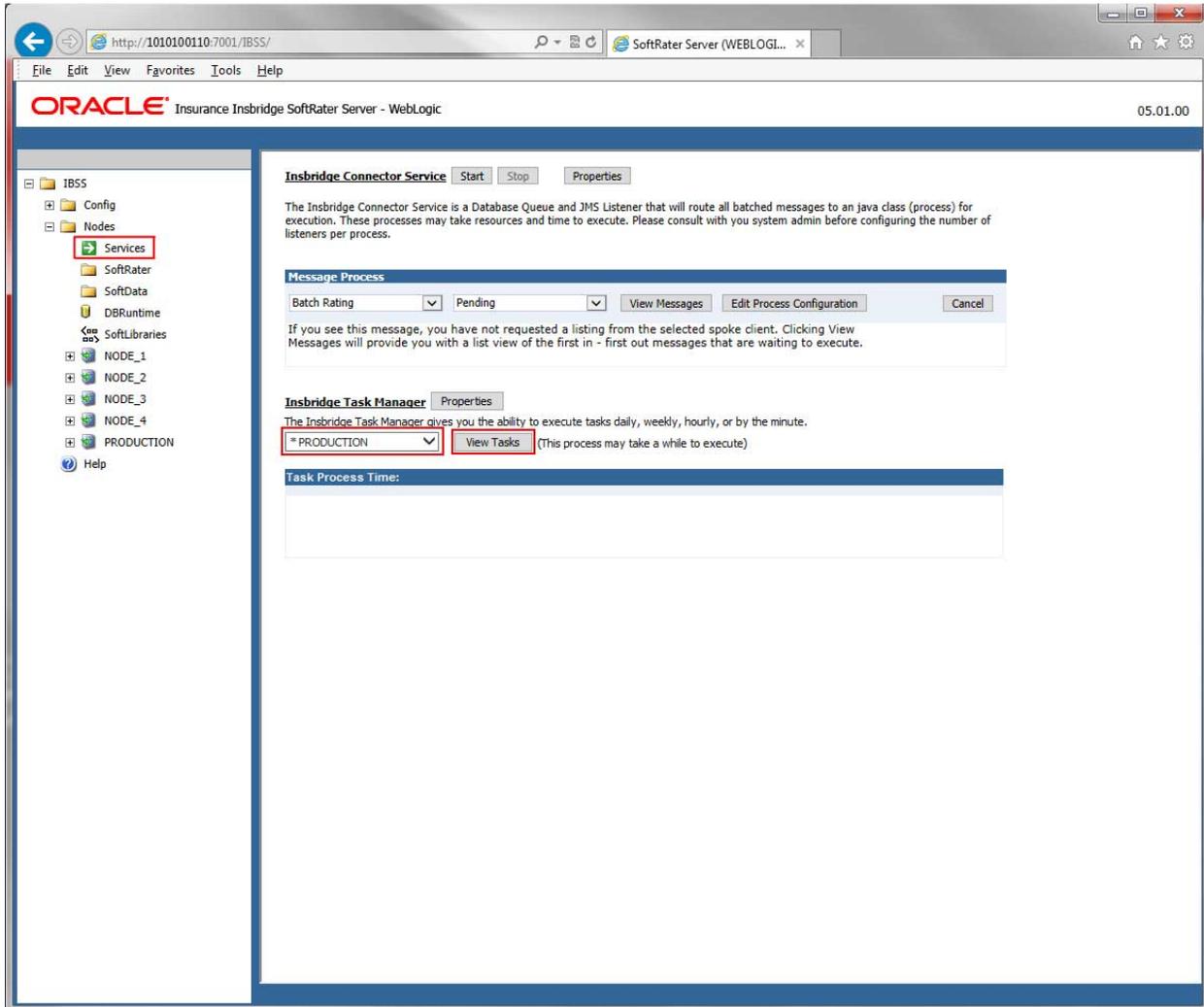


Figure 59 Viewing Tasks

Tasks are viewed per node. No changes can be made to tasks. These are view only.

1. Select the Node where you want to view tasks.
2. Click View Tasks.
3. Tasks are listed.

## SOFRATER TEST INTERFACE

The SoftRater Test Interface is located under the Nodes section. It is available to every node. Use the SoftRater Test Interface when you want to:

- Compare rates from different servers
- Verify a package is loaded
- Verify SoftRater is using the correct version of a program
- See how long SoftRater is taking to rate a program

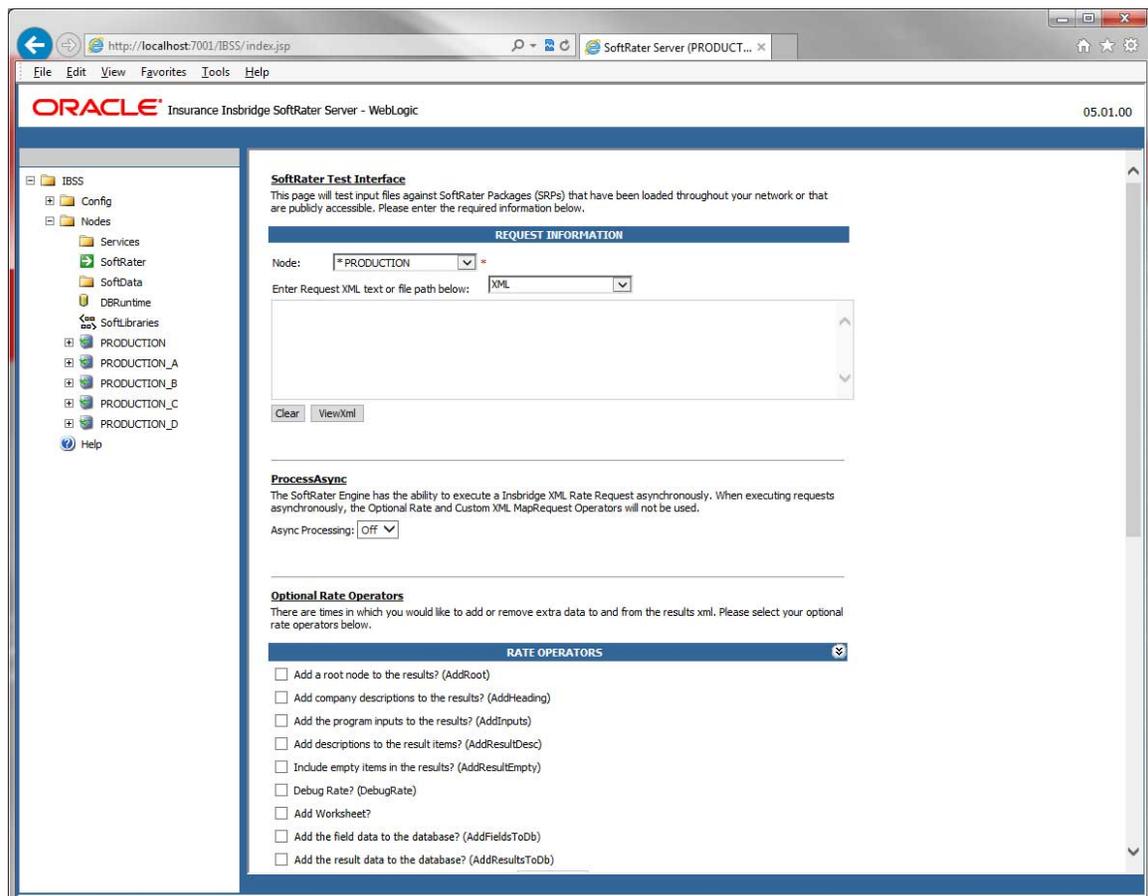


Figure 60 SoftRater Test Interface

When rating a file through the SoftRater Test Interface, you have the ability to instruct SoftRater on how to rate the file and how to return the results. Options are available in the section:

- **Request Information:** This area allows you to select the node to rate against, and enter the request type.
- **Rate Operators:** In this optional area, you can select to add data to a result XML or to remove data from the result XML.

- **Maprequest Operators:** This area is used when submitting custom XML.
- **Result Information:** This area displays the results that are returned from the engine.

## Request Information

This area located at the top of the page, allows you to select the node to rate against, and enter the request type.

### SoftRater Test Interface

This page will test input files against SoftRater Packages (SRPs) that have been loaded throughout your network or that are publicly accessible. Please enter the required information below.

REQUEST INFORMATION

Node:   \*

Enter Request XML text, file path below, or correlation id:

---

**ProcessAsync**

The SoftRater Engine has the ability to execute a Insbridge XML Rate Request asynchronously. When executing requests asynchronously, the Optional Rate and Custom XML MapRequest Operators will not be used.

Async Processing:

Figure 61 Request Information Area of SoftRater Test Interface

- **Node Select:** The nodes available are the nodes available to this instance of IBSS. An asterisk in front of the node name indicates the node you are currently on.
- **Request Type:** The format of the request you want to make.
  - **XML:** Copy and paste an XML file into the field.
  - **Path to XML:** Enter in the path to the XML file. This can be a network location.
  - **RecieveAsyncRequest – Correlation ID:** Enter in the correlation ID. If you process async, you can receive async. When you select this option, it is calling the ReceiveAsyncMessage. Enter the key in the text box and get the async request.
- **ProcessAsync:** The SoftRater test interface can be set to run asynchronously. Select ON to perform the action in the background and, optionally, notifies the email address entered on the Explorer page when the action is complete. Optional operators cannot be used with this option. Select OFF and the action is performed immediately while you wait. The default is OFF.

## Rate Operators

Rate operators are optional and function to add or remove information from the result XML. They also enable you to override the default result and environment definitions. To view or edit optional rate operators, click the expand icon  on the far right hand side of the RATE OPERATORS header.

### Optional Rate Operators

There are times in which you would like to add or remove extra data to and from the results xml. Please select your optional rate operators below.

**RATE OPERATORS**


- Add a root node to the results? (AddRoot)
- Add company descriptions to the results? (AddHeading)
- Add the program inputs to the results? (AddInputs)
- Add descriptions to the result items? (AddResultDesc)
- Include empty items in the results? (AddResultEmpty)
- Debug Rate? (DebugRate)
- Add Worksheet?
- Add the input data to the database? (AddInputsToDb)
- Add the result data to the database? (AddResultsToDb)

---

SoftRater environment definition override? (EnvRef)

Figure 62 Optional Rate Operators

---

**NOTE:** You can use any combination of rate operators. If both Debug and Worksheet are selected, only worksheet values are returned.

---

The following options require you to check a box to enable the item:

- **Add a root node to the results? (AddRoot):** Add the root node when you want to determine how long SoftRater is taking to rate a policy. The root node contains the time rating started and the time rating stopped. It also shows you the number of input files and the number of output files. The root node is always the first line in the results and begins with `<i bdoc>`.
- **Add company descriptions to the results? (AddHeading):** Add the folder pathway when you want to see the name of the path of the folder, program and program version.
- **Add the program inputs to the results? (AddInputs):** Add the program inputs when you want to verify that SoftRater is using the correct input values.
- **Add descriptions to the result items? (AddResultDesc):** Add descriptions to the results when you want to see the name of the variable or input along with the result ID. The variable or input name will be shown after the d, while the result ID is shown after the

i. In the following example output, `VehPri nci pal l yDri ven` is the input name, and `Pri mary Vehi cl e` is the result ID:

```
<m i="Pri mary Vehi cl e" d="VehPri nci pal l yDri ven" v="1" />
```

- **Include empty items in the results? (AddResultEmpty):** By default, SoftRater does not output results that do not have a value. If you would like to see all results, check this box.
- **Debug Rate? (DebugRate):** Check this box if you would like to see the debugged XML along with the results. Debug results are not returned if Worksheet is also selected.
- **Add Worksheet?:** Check to add any worksheet associated with this program to the results. Checking this box does not add a worksheet if one does not exist. If both Debug and Worksheet are selected, only Worksheet values are returned.

- **Add the input data to the database? (AddInputsToDb):** Add the input data to the database. The result XML contains the batch ID.

```
<db_rt_INPUT_BATCH_ID>
```

- **Add the result data to the database? (AddResultsToDb):** Add the result data to the database. The result XML contains the batch ID.

```
<db_rt_RESULT_BATCH_ID>
```

- **SoftRater environment definition override? (EnvRef):** If you do not want to rate against the default SoftRater environment, enter the environment that should be rated against in this box.

## Map Request Operators

Map request operators are optional and enable you to submit custom XML to the SoftRater engine and receive custom XML back from it.

### Optional Custom XML MapRequest Operators

If you would like to submit custom XML to the Insbridge Rating Engine, you must supply the rating information below. There are two ways in which you can submit custom XML and receive custom/Insbridge results.

1. Map your custom xml using the Insbridge RateManager. This process will create data processors for you. Note: You must map your inputs and outputs separately to achieve custom-in and custom-out success.
2. Upload your own processors to a RateNode file server for workflow custom-in and custom-out processing.

MAPREQUEST OPERATORS 

Subscriber:

Project:

Program:

Version:

---

Input Processor Type?  ▼

Input Processor Name:

Output Processor Type?  ▼

Output Processor Name:

---

Add results to custom input?

Figure 63 Custom XML Map Request Operators

The following information is required if you are using a mapping:

- **Subscriber:** Your subscriber ID.
- **Project:** The number for the project you are rating.
- **Program:** The program ID you are rating.
- **Version:** The program version you are rating.

The following information is required only if using custom input XML:

- **Input Processor Type:** The type of input mapping to use.
  - **GLOBAL:** A mapping that can be used by all programs under a specific project. Global mappings are created in RateManager from the **Custom XML Mapping** window on the right click menu of the project.
  - **LOCAL:** A mapping that is specific to a particular program version. Local mappings are created in RateManager from the **Program Listing** window on the right click menu of the program version.

- **CUSTOM:** A mapping that was created outside of RateManager and then imported.
- **Input Processor Name:** The unique identifier that was entered for the mapping.

The following information is required only if you want to receive custom output XML:

- **Output Processor Type:** The type of output mapping to use.
  - **LOCAL:** A mapping that is specific to a particular program version. Local mappings are created in RateManager from the **Program Listing** window on the right click menu of the program version.
  - **CUSTOM:** A mapping that was created outside of RateManager and then imported.
- **Output Processor Name:** The unique identifier that was entered for the mapping.

You can optionally check the following:

- **Add results to custom input:** If you want the original input file to be appended at the beginning of the result file, select this box.

## Result Information

The area at the bottom of the page contains the results that are returned from the engine along with the last execution time.

Results can be viewed in XML.

## Rating a File Using the SoftRater Test Interface

1. On the SoftRater Test Interface page, select the node that you want to rate against from the menu.
2. Select the request type and paste the XML file into the large text box or enter the path or correlation ID.

### SoftRater Test Interface

This page will test input files against SoftRater Packages (SRPs) that have been loaded throughout your network or that are publicly accessible. Please enter the required information below.

REQUEST INFORMATION

Node:  \*

Enter Request XML text or file path below:

```
<rate lob="1" >
<heading>
<program parent_id="8659" program_id="29" program_ver="6" />
</heading>
<c i="0" desc="Policy" >
<m i="18" n="ExpireDate" v="07/01/2014" />
<m i="19" n="EffectiveDate" v="06/01/2013" />
```

3. Scroll down the page and choose any optional operators SoftRater should use when rating the file.
4. When you are ready to rate the file, scroll to the bottom of the page and click **Execute**.
5. The file is rated and the results are shown in the results box.

### Results

Any results received from the Insbridge Rating Engine request will be in the text area below.

RESULT INFORMATION

```
<log machine="." queue="insbridge-broker response queue"><result gen_id="1" lob="1" renc="1" env_def="rm"
gen_date="2013-06-10 10:25:23 PM" ibdoc_version="3.1" engine_type="windows" site_location="PRODUCTION"
xmlns=""><program parent_id="8659" program_id="29" program_ver="6" package_date="2013-05-04T20:38:24"
status="PASS" gen_type="0" region_format="en-US" company_nm="FLA" program_nm="Auto Lab" version_nm="Total
Prem"><c i="3"><m i="BI_PREMIUM" v="106.27" /><m i="PDPREMIUM" v="114.14" /><m i="TOTALPDBIPREMIUM"
v="220.41" /></c></program><stats><start_time>2013-06-10 10:25:23:1718 PM</start_time><stop_time>2013-
06-10 10:25:23:1875
```

### Last Exec Time:

Last Exec Time: Mon Jun 10 17:03:43 CDT 2013

Figure 64 Test Results

6. To view the file in XML, click **ViewXml**.

## SOFTDATA TEST INTERFACE

The SoftData Test Interface allows you to test a SoftData request file that is in InbridgeDataRequest.XML format. You can select the node you want to rate against. The file can be copied from a source and pasted in the text box.

SoftData is located under the Nodes folder and is available to every node.

1. Select **SoftData** from the menu on the left. This opens the **SoftData Test Interface** page.

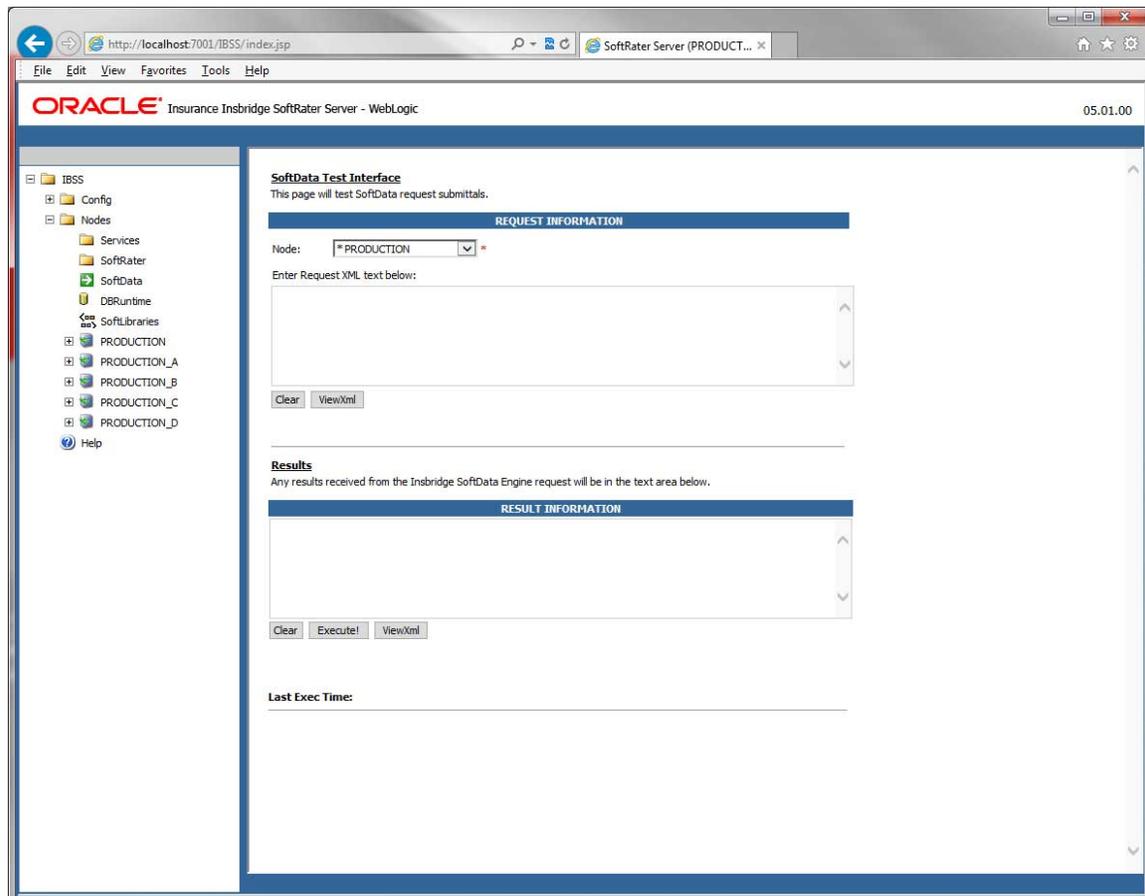


Figure 65 SoftData Test Interface

2. Select the node that you want to test against.
3. Enter in the Request XML.
4. Click **Execute**. The file will be submitted and the results are shown in the results box.
5. To view the XML file in Internet Explorer, click **ViewXML**.

---

**NOTE:** For SoftData format, please see the SoftData User Guide.

---

## DBRUNTIME

DBRuntime is the testing area for batch rating. Using nodes, you can create a batch, park it on disk, and send it to the node(s) for processing without having to interface with IBFA.

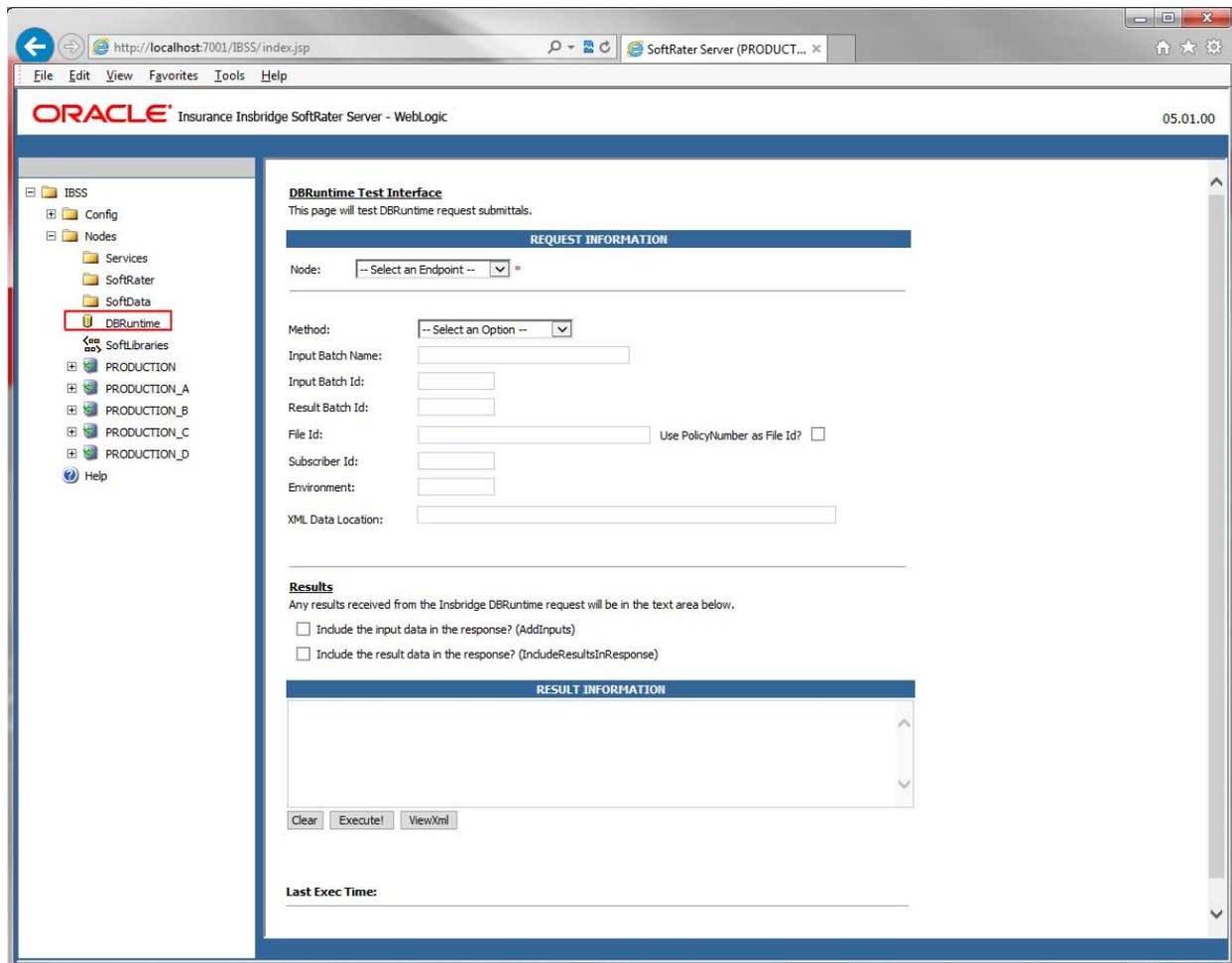


Figure 66 SoftData Test Interface

There are different ways to batch in IBSS:

- **Transactional Batch – Memory to Memory:** Sending multiple rates down at one time. For example, a single file with 20 rates can be sent all at once. When you are rating in memory, you can rate on a configurable option that you can set.
- **Async Rating:** When you send a batch, it rates, and you poll to see if it is complete. The async processing is the same. Web service to get you the results
- **SoftRater Node Rating – Disk to Disk:** A batch is sent to the node(s) that executes the batch. If more than one node is used, the requests are sent by a master to the next available machine. A

path is entered to the location of the file on disk. The files are rated, and then parked back on the disk or wherever you want to place them. Rating is done disk to disk using one or more nodes.

- **Clustering Database to hold and Cluster to Process:** All fields are loaded in a database and then a batch is submitted. Instead of one server distributing the load, the threads get the files. The files are in a pool and the nodes are used to process the request as they become open. The result files are then put in the database. This is a database to hold and the cluster processes method.

DBRuntime has a request information area and a result information area.

## Request Information

The Request Information area holds the details of the request.

- **Node:** The endpoint you want to use. The nodes listed are the nodes available to this instance of IBSS.
- **Method:** The option you want to perform. The selected option determines the required fields.
  - **RateFromDb:** Rate a file from the database.
  - **GetInputXML:** Get the input XML.
  - **GetResultXML:** Get the result XML.
  - **AddInputXML:** Add the input XML.
  - **DeleteInputBatch:** Delete an input batch file.
  - **DeleteResultBatch:** Delete a result batch file.
  - **SendBatchResultsEmail:** Send a batch results email.
- **Input Batch Name:** A user defined name for the input batch. Used when adding an input XML file.
- **Input Batch Id:** A user defined ID for the input batch. Used for rating from database and input methods types.
- **Result Batch Id:** A user defined ID for the result batch. Used for result methods types.
- **File Id:** A user defined file ID for the batch. Used for rating from database and get input XML, get result XML, and send batch results email methods types.
- **User PolicyNumber as File Id:** Check this option if you want to use the policy number as the file ID.
- **Subscriber Id:** The subscriber ID used. Required for every method type.
- **Environment:** The environment to be used. Environments are listed on the IBSS home page. Required for every method type.
- **XML Data Location:** The location of the XML. Used when adding input XML.

## Result Information

The area at the bottom of the page contains the results that are returned from the engine along with the last execution time.

Results can be viewed in XML.

There are two options for results:

- **Include the input data in the response? (AddInputs):** Check this option to include the input data in the response.
- **Include the result data in the response? (IncludeResultsInResponse):** Checking this option allows for the result data to be included in the response

## Running a Rate Using DBRuntime

1. Select **DBRuntime** from the menu on the left. This opens the **DBRuntime** page.
2. Select the node that you want to test against.
3. Enter a subscriber ID.
4. Enter the Environment
5. Enter in the location of the XML data. This can be local or a network share.
6. Check if you want any result options.
7. Click **Execute**. The file will be submitted and the results are shown in the results box.
8. To view the XML file in Internet Explorer, click **ViewXML**.

---

**NOTE:** *The asterisk ( \* ) indicates the node you are currently on.*

---

## SOFTLIBRARIES

The SoftLibraries section of IBSS allows an administrator to add, edit or delete external libraries. SoftLibraries can be created by developers and can be setup as an application or a lookup and are available to all nodes. After being added to IBSS, SoftLibraries must be added and activated in IBFA. Only active SoftLibraries can be used by callout programs in RateManager. In SoftLibraries you can:

- **Add Libraries**
- **Edit Libraries**
- **Delete Libraries**

SoftLibraries are an advanced topic. This chapter defines the screen features and the functionality. Developing the code that is called will not be discussed here.

SoftLibraries can be found under Nodes -> SoftLibraries.

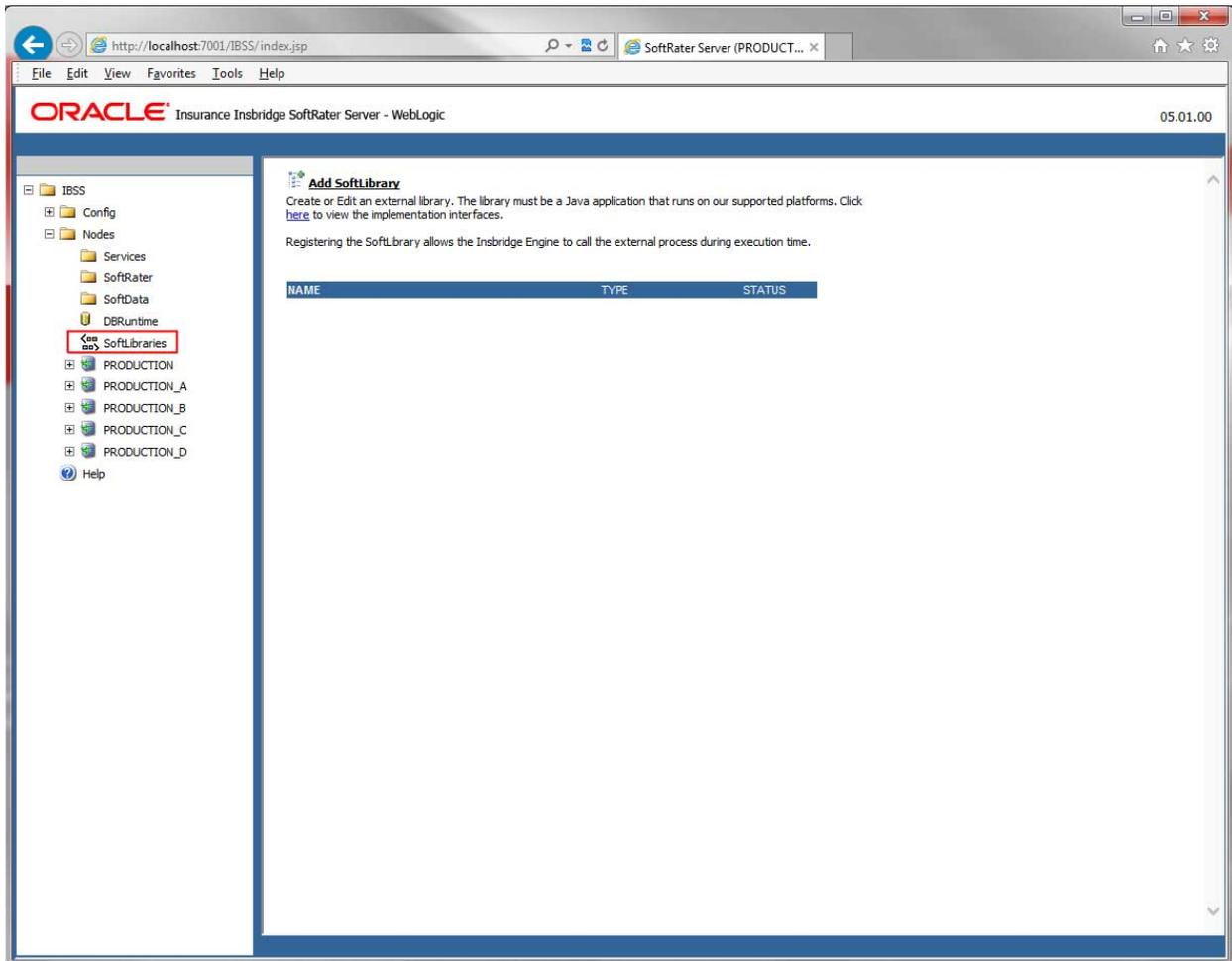


Figure 67 SoftLibraries Main Menu

The main SoftLibraries page lists any entered SoftLibraries. Other information includes:

**Name:** The name of the SoftLibrary.

**Type:** The type of SoftLibrary, either .NET Web Service, WebSphere or WebLogic.

**Status:** The status, either active or disabled.

---

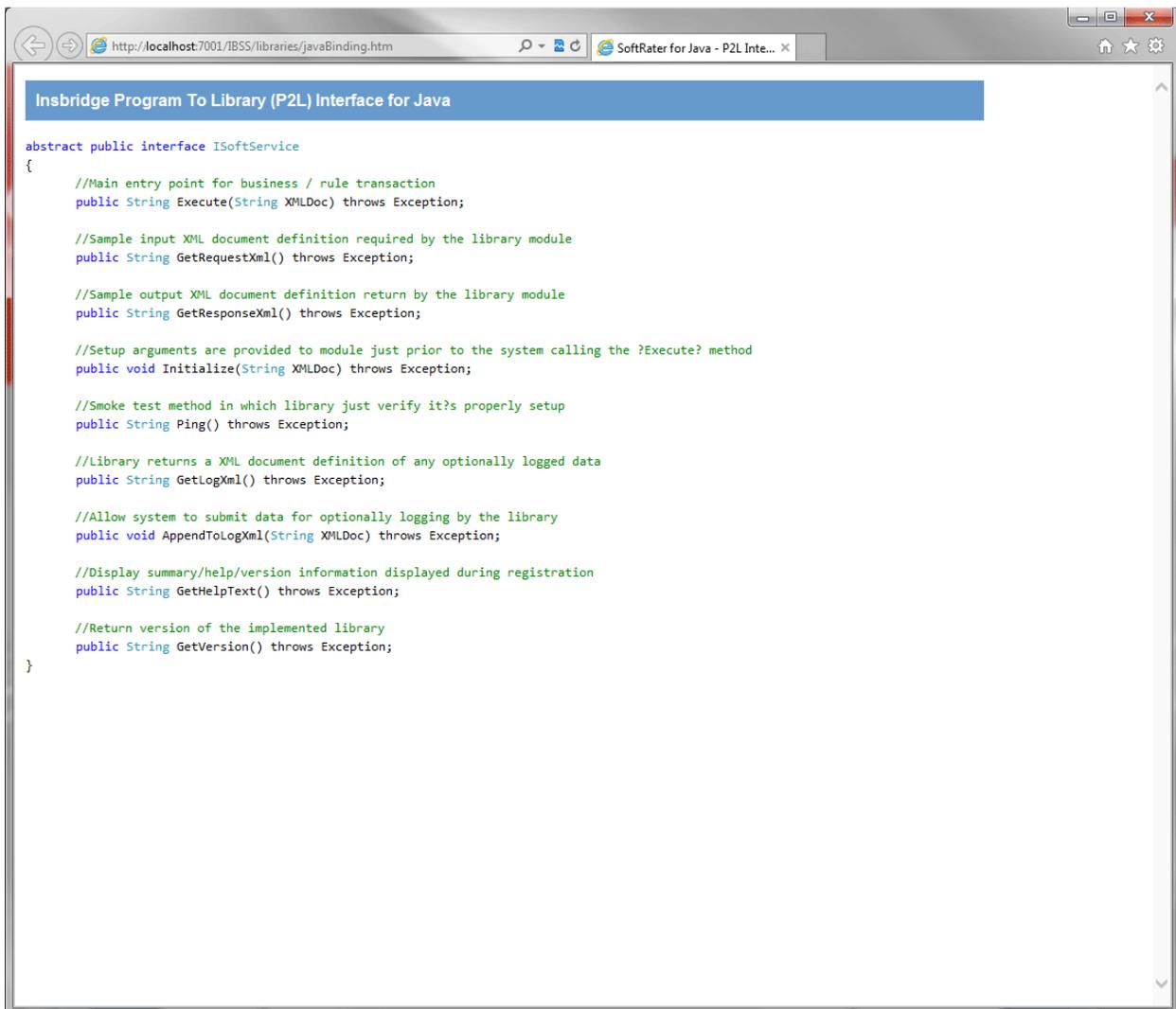
**NOTE:** *The status determines whether or not a SoftLibrary is available to IBFA. If a SoftLibrary is disabled, it will not be displayed in IBFA. If a SoftLibrary is active, it will be displayed.*

---

The following information is found at the top of the window:

**Add SoftLibrary:** This link places you on the new SoftLibrary window.

**Click [here](#) link:** Found on “Click [here](#) to view the implementation interfaces.” This pulls up a separate window that contains the implementation interfaces required by SoftLibraries. This window can be left open while you work.



```
abstract public interface ISoftService
{
    //Main entry point for business / rule transaction
    public String Execute(String XMLDoc) throws Exception;

    //Sample input XML document definition required by the library module
    public String GetRequestXml() throws Exception;

    //Sample output XML document definition return by the library module
    public String GetResponseXml() throws Exception;

    //Setup arguments are provided to module just prior to the system calling the ?Execute? method
    public void Initialize(String XMLDoc) throws Exception;

    //Smoke test method in which library just verify it?s properly setup
    public String Ping() throws Exception;

    //Library returns a XML document definition of any optionally logged data
    public String GetLogXml() throws Exception;

    //Allow system to submit data for optionally logging by the library
    public void AppendToLogXml(String XMLDoc) throws Exception;

    //Display summary/help/version information displayed during registration
    public String GetHelpText() throws Exception;

    //Return version of the implemented library
    public String GetVersion() throws Exception;
}
```

Figure 68 SoftLibrary Implementation Information

## ADDING SOFTLIBRARIES

Adding a SoftLibrary is a multi-step process.

If you want to create a Java class library, the .JAR file must be placed in a specific location and then entered into IBSS. After entering in IBSS, the SoftLibrary can be added in IBFA. Please have the Class Name and Endpoint information ready.

### Step 1: Placement of Library on App Server

---

**NOTE:** For the first part of adding a SoftLibrary, you must have access to the application server where IBSS is located.

---

1. Have your Java class library ready as a .JAR file.
2. On the application server where IBSS is located, stop the app server.
3. Place the .JAR file in the lib location designated by application:
  - a. **WebLogic:** Place the .JAR file in the  
/\$WL\_Home/user\_projects/domains/YOUR\_DOMAIN/lib.
  - b. **WebSphere:** Place the .JAR file in the WebSphere install directory  
/\$WS\_Home/AppServer/lib.
  - c. **JBoss:** Place the .JAR file in the JBoss install directory  
/\$JB\_Home/server/SR\_Server/lib.

Where \$\_Home is the relative path to the app server installation location.

4. Restart the app server.

---

**NOTE:** To enter a library in IBSS, you must have the Class Name.

---

## Step 2: Entering Library in IBSS

1. On the SoftLibrary page, click the **Add SoftLibrary link** at the top of the window. A separate window is displayed.

The screenshot shows a 'Webpage Dialog' window with a close button in the top right corner. The window is divided into a sidebar on the left and a main form area on the right. The sidebar contains a 'Library' section and a list of menu items: Arguments, GetHelpText, RequestXML, ResponseXML, Ping, GetLog, and Test. The main form area contains the following fields and controls:

- Type: Native (dropdown menu)
- Admin Name: (text input field)
- Class Name: (text input field)
- Naming: (text input field)
- Context Factory: (text input field)
- RMI: (text input field)
- Url Host: (text input field)
- Url Port: (text input field)
- Logging:
- Status: Active (dropdown menu)

At the bottom of the form area, there are three buttons: Save, Remove, and Close.

Figure 69 SoftLibraries Main Screen

The SoftLibrary window allows you to enter in basic information and to view critical information about the SoftLibrary. There are eight options on the side menu:

- **Library:** The basic SoftLibrary information is entered here.
- **Arguments:** Enter or edit the arguments for the SoftLibrary here.
- **GetHelpText:** This is an information window. If you want a quick view of the SoftLibrary, this window contains the basic information.
- **Request XML:** The request XML will be displayed here. This will tell you what requests you are sending out. This is an information only window.
- **Response XML:** The response XML will be displayed here. This will tell you exactly what you are getting back. This is an information only window.
- **Ping:** Will ping the server to verify server response.
- **GetLog:** If logging is turned on, this window will display logs.

- **Test:** Allows you to test the SoftLibrary.

There are three buttons located in the Library Add/Edit section.

- **Save** – Saves your work.
- **Remove** – Removes the entire library.
- **Close** – Closes the window without saving.

2. The first window is the Library information window. Information must be entered here before you can continue.

- Select the Type. There are two types of SoftLibraries in IBSS:
  - **Native** – The library is installed as an application on the app server.
  - **Lookup** – The library uses an EJB Lookup.

### For Native Entries

The screenshot shows a web browser window titled "-- Webpage Dialog" with a close button in the top right corner. The main content area is titled "Library" and contains a sidebar on the left with a tree view of library components: Arguments, GetHelpText, RequestXML, ResponseXML, Ping, GetLog, and Test. The main area contains the following configuration fields:

- Type: Native (dropdown)
- Admin Name: Library (text input)
- Class Name: com.insbridge.samples.Library (text input)
- Naming: (text input)
- Context Factory: (text input)
- RMI: (text input)
- Url Host: (text input)
- Url Port: (text input)
- Logging:  (checkbox)
- Status: Active (dropdown)

At the bottom right of the main area are three buttons: Save, Remove, and Close.

Figure 70 SoftLibrary Native Type

- **Admin Name:** This is the name of the SoftLibrary as it is displayed in RateManager. It is also the name that will be displayed on the lower section of the SoftLibraries page. Admin names must be unique.
- **Class Name:** This is the name of the actual SoftLibrary created by the developer from the program where it was created. This information can be obtained from the developer. Class names must be unique.
- **Logging:** Check this box if you want logging for this program. Leave it blank for no logging. The default is for no logging take place.
- **Status:** The status of the SoftLibrary. If active is selected, the SoftLibrary will be displayed to RateManager users. If disable is selected, the SoftLibrary will not will be displayed to users. The default status is disabled.

## For Lookup Entries

The screenshot shows a web browser window titled "-- Webpage Dialog" displaying the configuration for "Library A". The interface includes a sidebar with menu items: Library, Arguments, GetHelpText, RequestXML, ResponseXML, Ping, GetLog, and Test. The main area contains the following configuration fields:

- Type: Lookup (dropdown)
- Admin Name: Library A (text input)
- Class Name: com.insbridge.smple.Library\_A (text input)
- Naming: jdbc/lookup (text input)
- Context Factory: weblogic.jndi.WLInitialContextFactory (text input)
- RMI: t3 (text input with a close button)
- Url Host: localhost (text input)
- Url Port: 7001 (text input)
- Logging:  (checkbox)
- Status: Active (dropdown)

At the bottom right, there are three buttons: Save, Remove, and Close.

Figure 71 SoftLibrary Lookup Type

- **Admin Name:** This is the name of the SoftLibrary as it is displayed in RateManager. It is also the name that will be displayed on the lower section of the SoftLibraries page. Admin names must be unique.

- **Class Name:** This is the name of the actual SoftLibrary created by the developer from the program where it was created. This information can be obtained from the developer. Class names must be unique.
  - **Naming:** The name of the data source.
  - **Context Factory:** A URL context factory is a special object factory that creates contexts for resolving URL strings.
  - **RMI:** The Java Remote Method Invocation used.
  - **URL Host:** The name or IP of the host server.
  - **URL Port:** The port number used by the host server.
  - **Logging:** Check this box if you want logging for this program. Leave it blank for no logging. The default is for no logging take place.
  - **Status:** The status of the SoftLibrary. If active is selected, the SoftLibrary will be displayed to RateManager users. If disable is selected, the SoftLibrary will not will be displayed to users. The default status is disabled.
3. Click **Save** to add your SoftLibrary. It will be displayed on the lower portion of the screen.

If there are any errors with the new SoftLibrary, a message will be displayed at the top of the screen explaining the conflict.

### **Step 3: Entering in IBFA**

SoftLibraries entered in IBSS are not displayed in RateManager until added and activated in IBFA. You will need to have the Admin Name, Class Name, and Endpoint in order to add the SoftLibrary in IBFA. Please see the IBFA User Guide for more information.

## Arguments

After a library is created, arguments can be entered. Arguments are settings that the library should use.

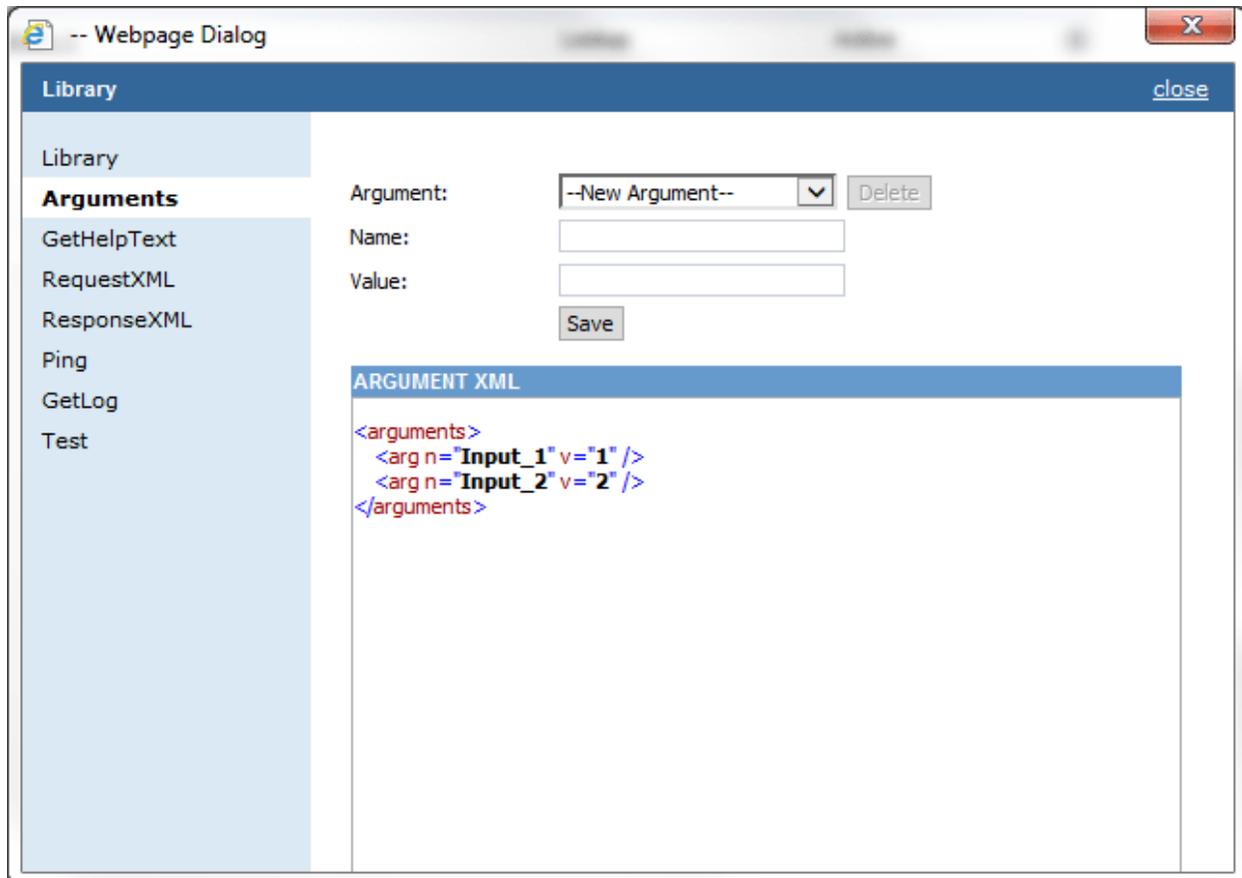


Figure 72 Editing Arguments

### Adding an Argument

To create an argument, select **--New Argument--** in the Argument drop down list. Enter in a **Name** and a **Value**. Click **Save**. Your argument will be listed below.

To add an argument, select the **Argument** you want from the drop down menu. The argument name will populate the **Name** field. The current value will populate the **Value** field. If these arguments are correct, click **Save**. If you need to, you can edit both the name field and the value field by typing in what you need.

### Editing an Argument

To edit an argument, select the argument from the Argument drop down list. Edit the **Name** and a **Value**. Click **Save**. Your argument will be listed below with the new values.

### Deleting an Argument

If there is an argument that you do not need, you can delete it. Select the argument from the drop down menu and click the **Delete** button. The argument will be removed.

## GetHelpText

If you want to check your SoftLibrary, continue on the **GetHelpText** option on the side menu. The basic information will be listed.

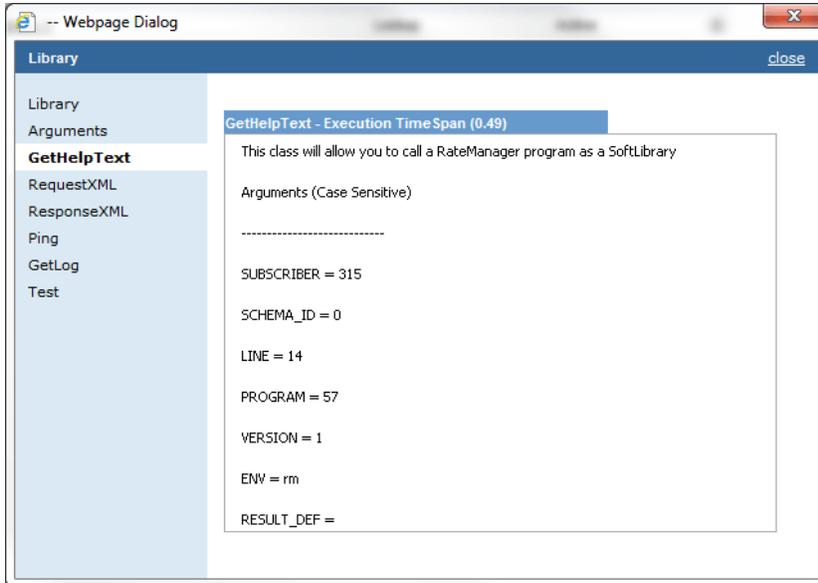


Figure 73 GetHelpText Window

## RequestXML

The next information window is the **RequestXML** window. This window displays the request XML that is going out.

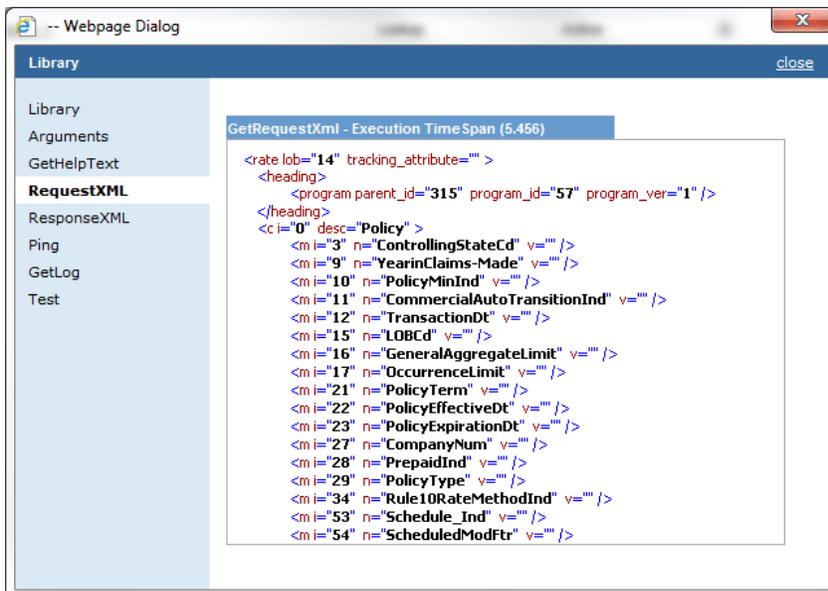
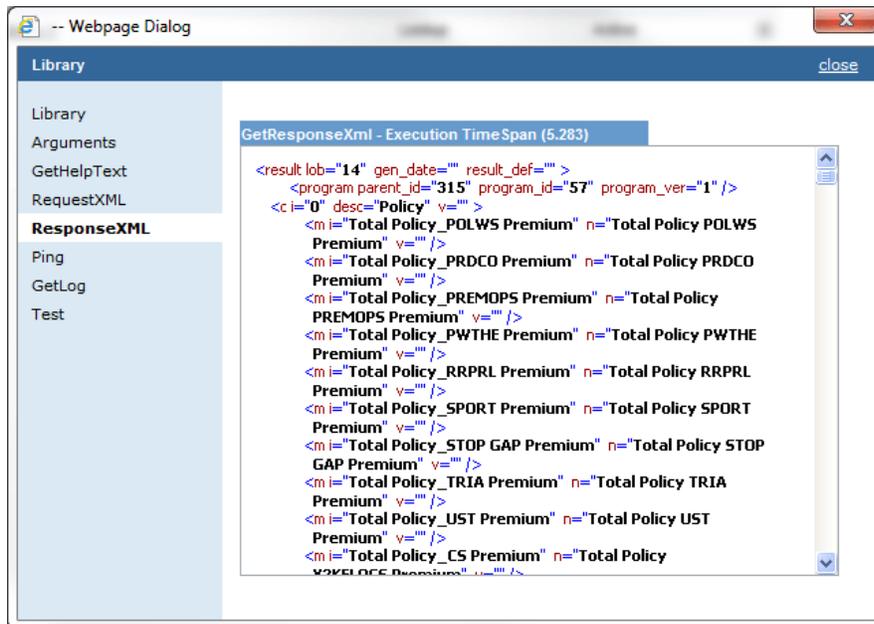


Figure 74 RequestXML Window

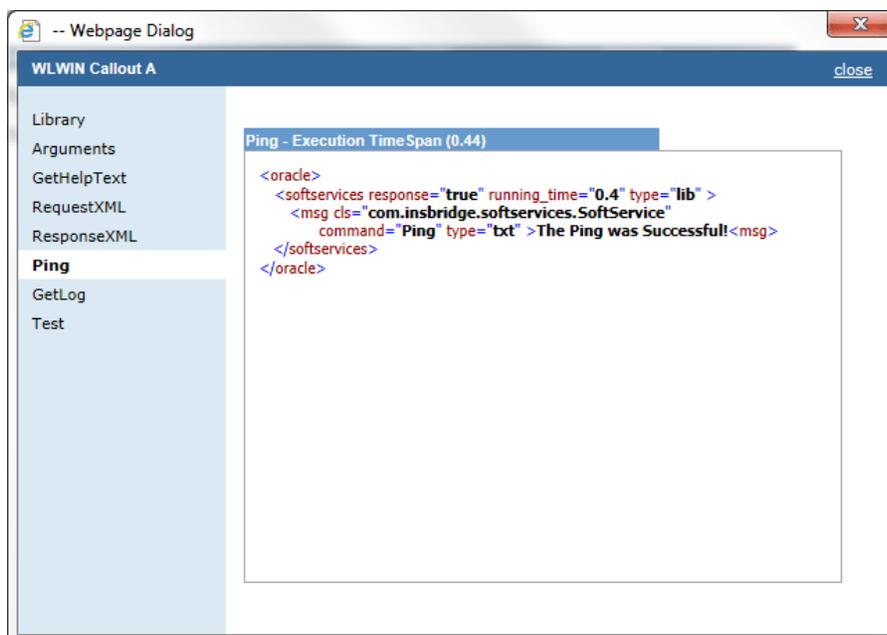
## ResponseXML

The **ResponseXML** window tells you exactly what you are getting back.



## Ping

If you would like to ping the server, click the **Ping** menu option.



## GetLog

To view the logs, click the **GetLog** menu option.

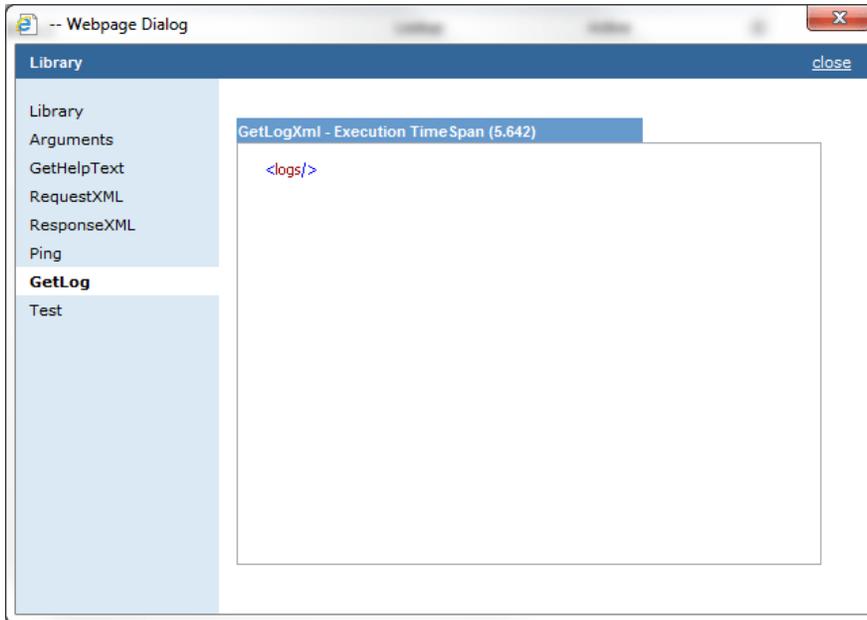


Figure 77 GetLog Window

## Test

The last menu option is Test. Test has three parts

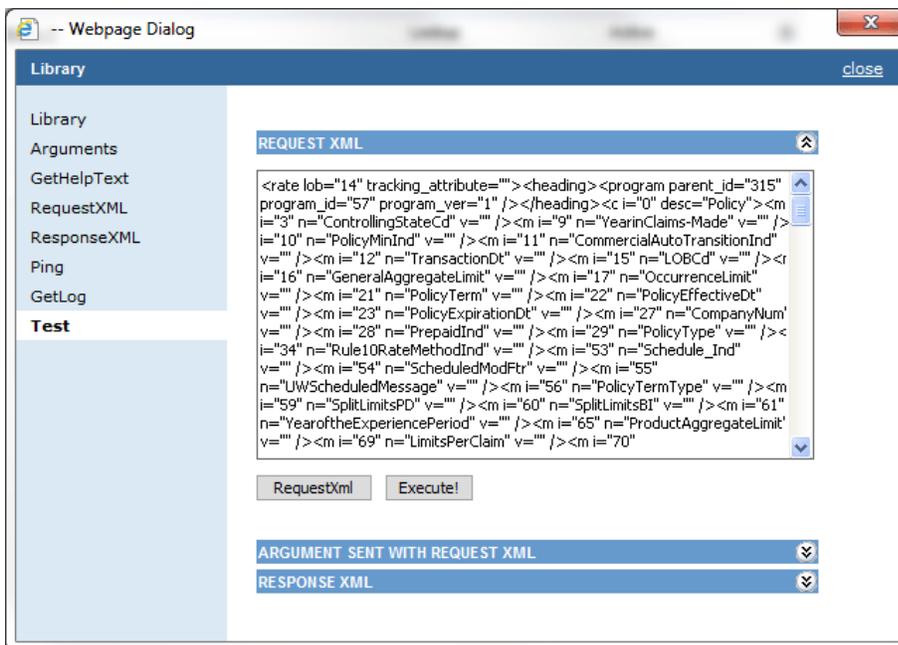


Figure 78 Test Window – Request

- First you must enter in the RequestXML. You can enter in your own XML or you can click the **RequestXML** button and have the XML auto populate for you.
- You can view the arguments sent with the request XML.
- Click the **Execute!** button to execute the XML. The responseXml will be displayed. To view the Arguments sent or to view the RequestXML, click the expand button .

After a SoftLibrary has been entered, it is listed on the main SoftLibrary page. You can view quick details by expanding the arrow on at the end of the field.

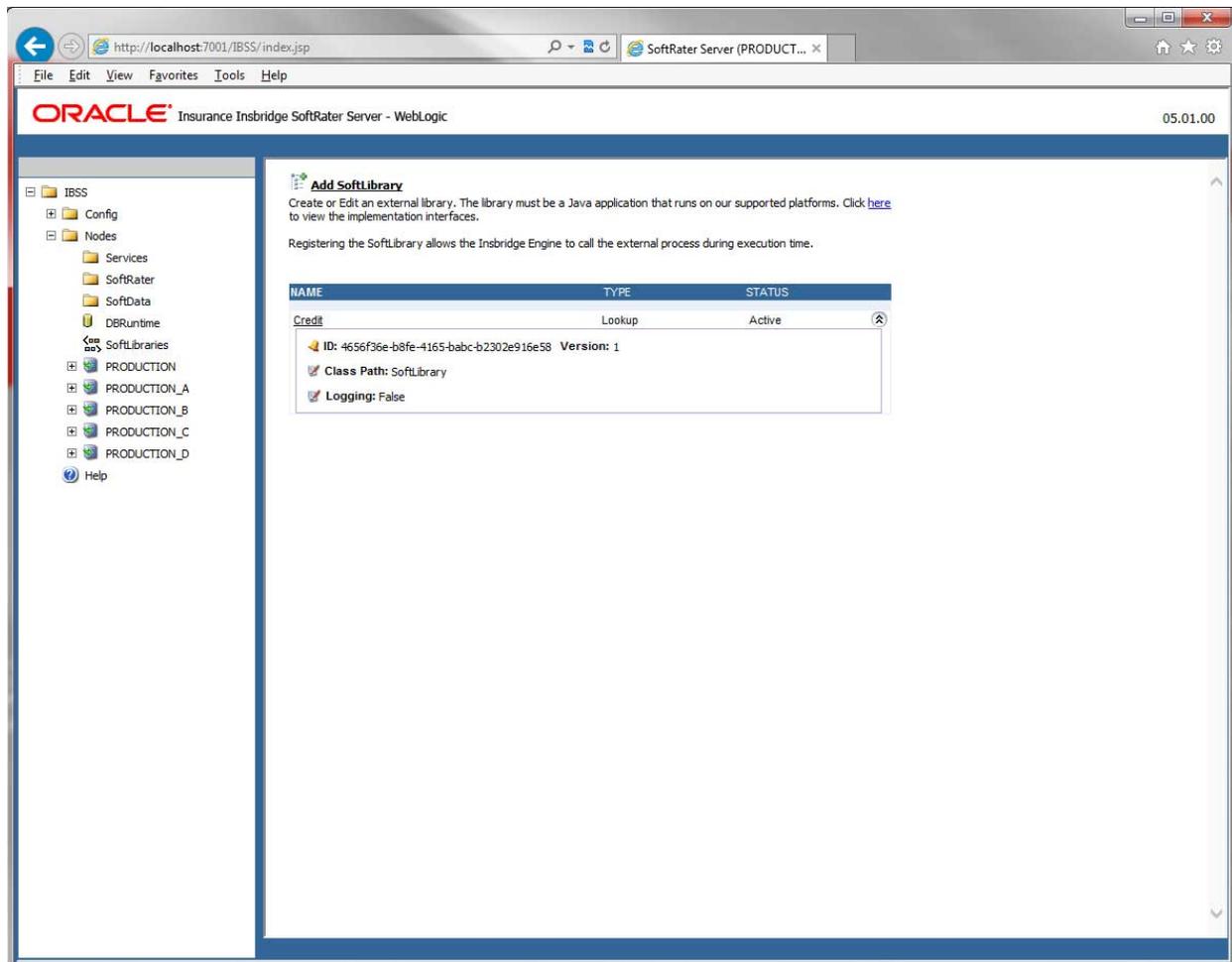


Figure 79 Completed SoftLibrary

## EDITING SOFTLIBRARIES

Any SoftLibrary can be edited at any time. Changes to a SoftLibrary in IBSS may not be automatically carried over to IBFA. If you edit the Admin Name or Class Name, you will have to edit the same information in IBFA. You also could delete the SoftLibrary in IBFA and then re-add it. Be aware that changes to a SoftLibrary here will affect any programs in RateManager that currently call this SoftLibrary without sending notice to users.

To edit a SoftLibrary, click on the name. The SoftLibrary window will be displayed. Make your edits and click **Save**.

## Deleting SoftLibraries

Any SoftLibrary can be deleted at any time. Be aware that changes to a SoftLibrary here will affect any programs in RateManager that currently call this SoftLibrary without sending notice to users. SoftLibraries will also have to be deleted out of IBFA.

To delete a SoftLibrary, click the name. The SoftLibrary window will be displayed. Click the **Remove** button. A warning message will be displayed, click OK to remove the SoftLibrary. Click Cancel to return to the SoftLibrary window.

## Sample for Sending a Message to Call a SoftLibrary

This sample can be used when you have a third party application that needs to communicate with an IBSS SoftLibrary. This is the message that gets sent to the SoftLibrary services.

### Sample Message:

```
<oracle>
<softservices type='lib'>
  <msg command='Execute' name='MyServiceName'>
    <my_xml_root>
      <My_Message> Abc-123</My_Message>
    </my_xml_root>
  </msg>
</softservices>
</oracle>
```

Where:

| Command       | Definition   |
|---------------|--|
| type='lib'    | Standard argument for requesting (SS) libraries. This is a required entry.   |
| command='xxx' | Where <i>xxx</i> equals the option to be performed.<br>Options include:<br><ul style="list-style-type: none"> <li>'Execute'</li> <li>'GetRequestXml'</li> <li>'GetResponseXml'</li> <li>'Ping'</li> <li>'GetLogXML'</li> <li>'AppendToLogXml'</li> <li>'GetHelpText'</li> <li>'GetArgs'</li> </ul> <b>NOTE:</b> Values are <b>NOT</b> case sensitive.<br>This is a required entry. |
| name='xxx'    | Where <i>xxx</i> equals the admin name of the (SS) from the IBSS (SS) admin console.<br><b>NOTE:</b> Values <b>ARE</b> case sensitive.<br>This is a required entry.  |
| Abc-123       | Where <i>Abc-123</i> equals your XML.  |

## NODE MANAGEMENT

Nodes are serviced and managed at the node level.

## NODE INFORMATION PAGE

Nodes are listed in the Nodes section on the IBSS home page and on the left side of the screen under the nodes folder.

The nodes folder holds the shared functionality available to all nodes and the details and functionality available to each individual node. To view the details of an individual node, expand the Nodes folder and select the node where you want to view or edit details.

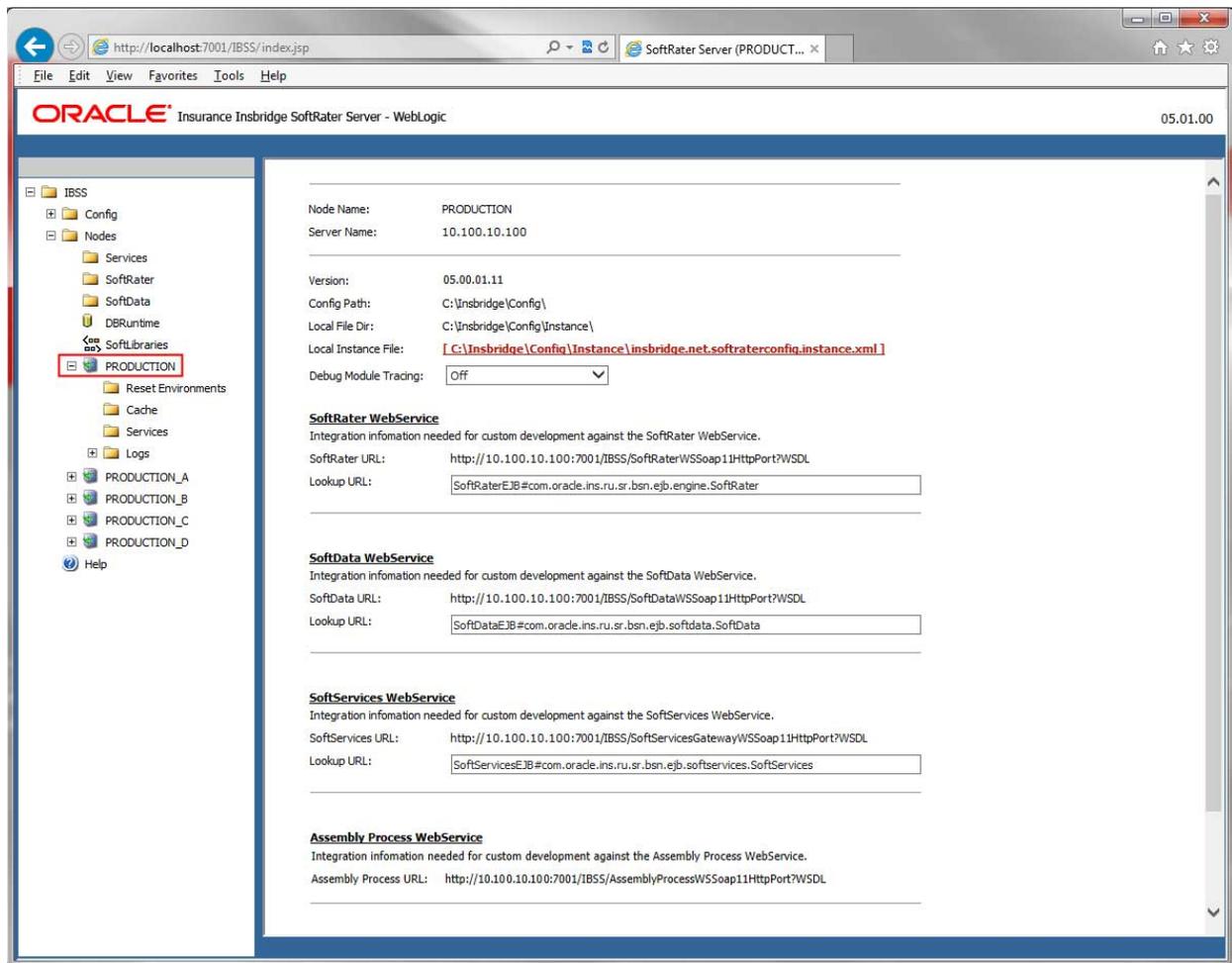


Figure 80 Node Management Window

To view the properties of the node, click the node name. The Node Information page is displayed. A few fields can be edited on this page. Most fields must be edited in other areas or cannot be edited.

- **Node Name** – The friendly name of the node. This is the name entered when the node was created. This can be edited on the IBSS home page by editing the node.
- **Server Name** – The server name or IP address where the node is located. This is a non-editable field.
- **Version** – The current IBSS version. Support may need this information if you have to contact them. This is a non-editable field.
- **Config Path** – The path to the shared config.xml file. This is a non-editable field.
- **Local File Dir** – The location of the Instance folder. The instance folder holds the error and audit logs for the node. This directory should be unique per node. This is a non-editable field.
- **SoftRater WebService** – The integration information needed for custom development against the SoftRater WebService. The Lookup URL can be modified.
- **SoftData WebService** – The integration information needed for custom development against the SoftData WebService. The Lookup URL can be modified.
- **SoftServices WebService** – The integration information needed for custom development against the SoftServices WebService. The Lookup URL can be modified.
- **Assembly Process WebServices** – The integration information needed for custom development against the Assembly WebService. This is a non-editable field.
- **Insbridge Task Service** – Timer EJB – An internal IBSS integration setting for the Insbridge Task Service. The Lookup URL can be modified.

## Editing Lookup URLs

To update Lookup URLs, enter in the new URL and click Save at the bottom of the window. Your entry is saved immediately. You must save your entry. If you leave the page without saving, the URL is not updated. No warning message is displayed if you make changes and leave the page.

## Debug Module Tracing

Debug Module Tracing can be enabled by from the Node Management screen. Enabling tracing provides additional information about the Module where tracing was enabled in the logs. The addition logs are also logged along with the usual application logs. Logs can be found in the Error Logs section under Logs.

IBSS > Nodes > <Node\_Name>

where

<Node\_Name> is the node that executed the request.

In the <Node\_Name> screen, there is a dropdown for Debug Module Tracing. The Modules that can be traced using this option are:

- Off
- All
- Assembly Manager
- SoftRater Batch ExecQueue
- JMS
- SoftRater Batch
- SoftRater Web Services
- Task Manager
- WorkManager
- Remote Call
- SoftRater Cache
- SoftRater Locator
- Connector Service
- IBSS UI
- Impact Analysis

To perform a debug trace, select the option you want to trace using the drop down menu.

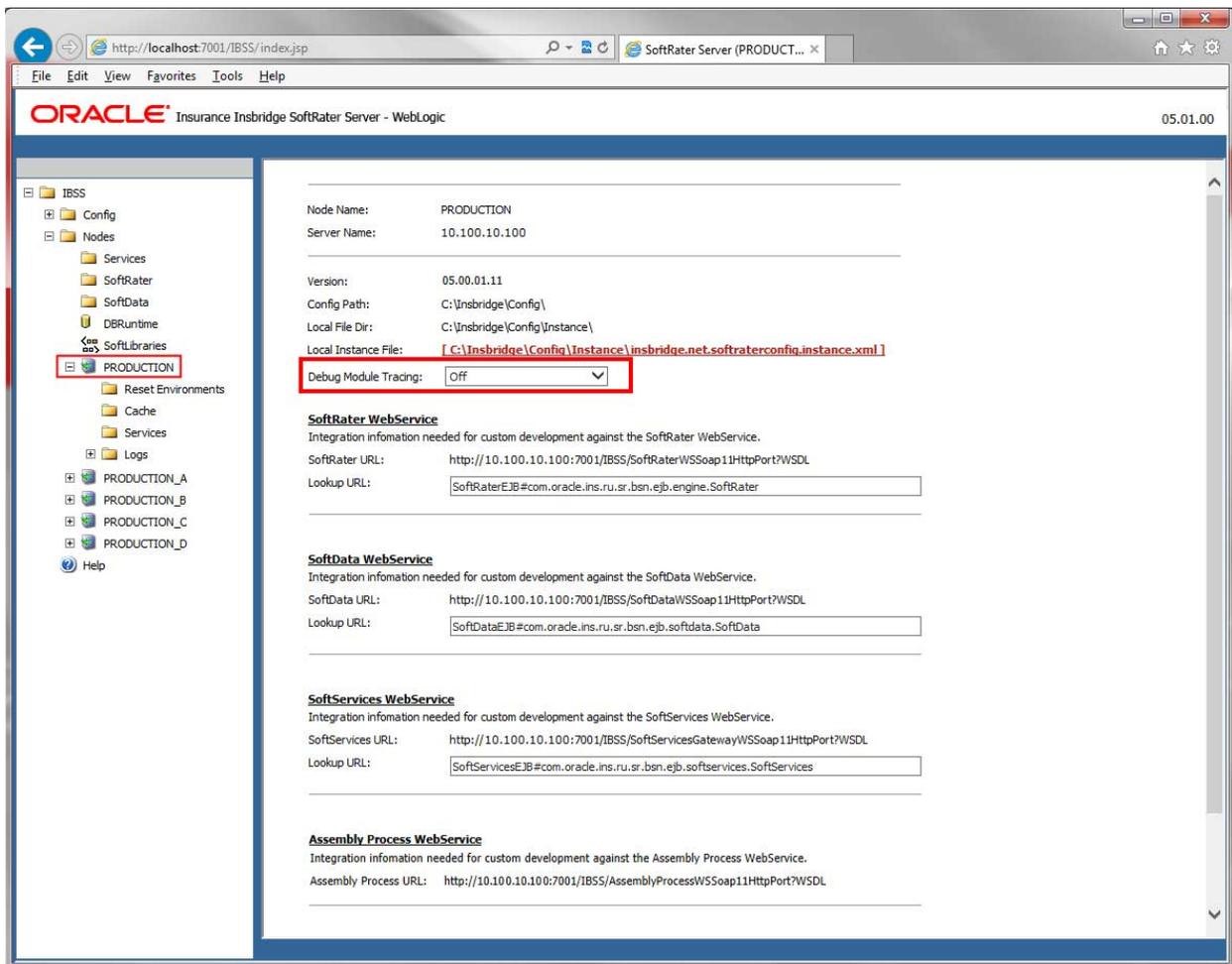


Figure 81 Debug Module Tracing

Each module logs particular details, and the Debug tracing can be enabled only to those modules. The details about the modules being tracked by each tracing option are:

---

|                                  |   |
|----------------------------------|---|
| <b>Off</b>                       | No tracing is done. This is the default option.   |
| <b>All</b>                       | This option enables tracing across all modules. Selecting this option logs all details about the process. This may make debugging a specific module difficult due to the level of information returned. Make sure this is the option you want.              |
| <b>Assembly Process</b>          | All the database related operations and the Assembly process operations like starting a batch request, submitting a pending request, and other request operations are logged under this module. This can be used to trace errors with inputs to the engine. |
| <b>SoftRater Batch ExecQueue</b> | All the operations related to the batch execution queue are logged in this module.  |
| <b>JMS</b>                       | The Queue related operations like inserting a message into queue, peek a message from queue are logged under the JMS Module.  |
| <b>SoftRater Batch</b>           | All the Batch operations before submitting the request to the engine are logged under this module.  |
| <b>SoftRater Web Services</b>    | This module logs all the web service related operations.  |
| <b>Task Manager</b>              | All the Timer related operations like scheduling a task, cancel a task and other details regarding the Task Listing are logged under this module.   |
| <b>WorkManager</b>               | Information regarding the job that is being executed, the Connector Service information, and how many threads are processing a request and the node that active are logged under this module.   |
| <b>Remote Call</b>               | The remote operations, such as engine execution, and the remote proxy client operations, are logged under this module.  |
| <b>SoftRater Cache</b>           | The operations related to the Program Listing and other cache operations are logged using this module.  |
| <b>SoftRater Locator</b>         | The EJB home locator details are logged using this module.  |
| <b>Connector Service</b>         | Connector Service operations, such as starting a service, are logged under this module.   |
| <b>IBSS UI</b>                   | UI operations, such as Email configuration details, are logged under this module.   |
| <b>Impact Analysis</b>           | The operations related to Impact Analysis are logged using this module.   |

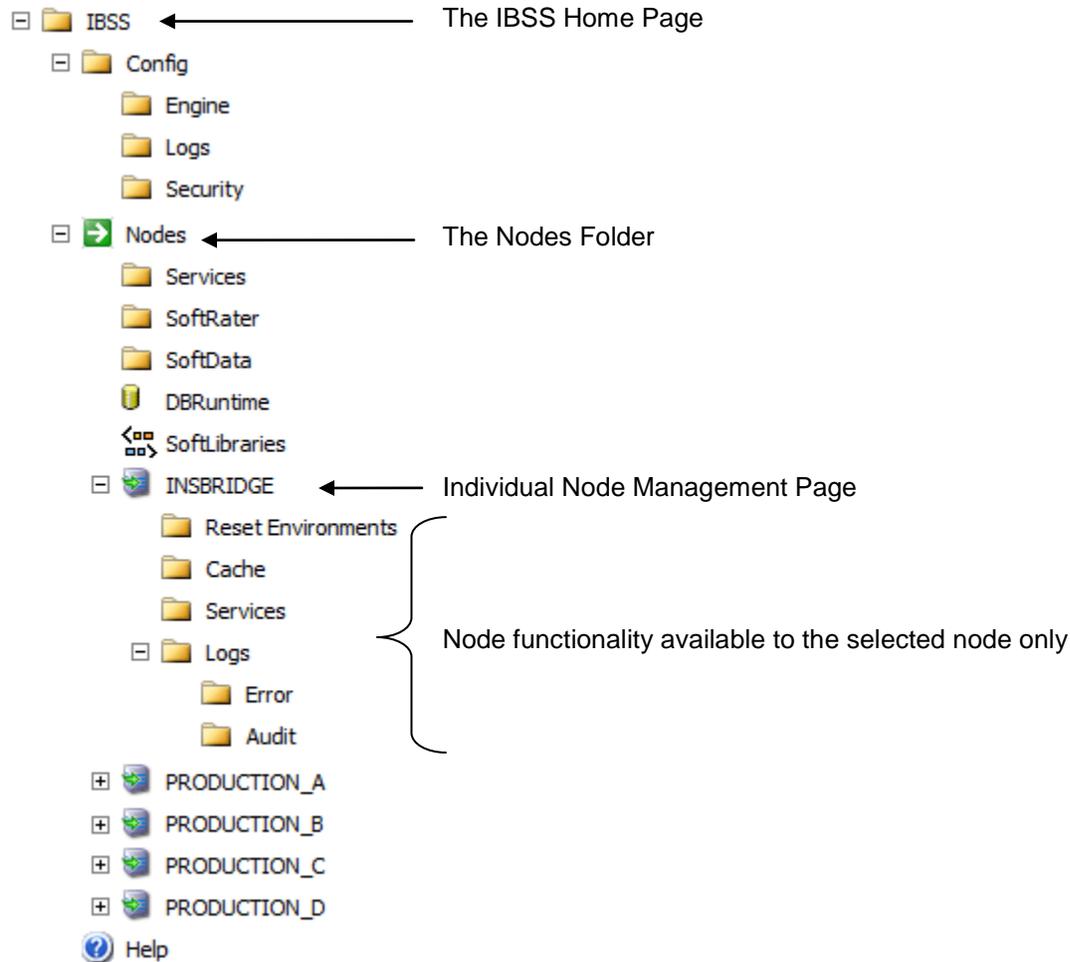
---

**NOTE:** *In IBSS, Error and Information logs are both located on the Error Logs page. Error Logs can be viewed under IBSS > Nodes > <Node\_Name> > Logs > Error*

---

## NODE FUNCTIONALITY

Under the Nodes folder, there is shared functionality that is available to all nodes. Under each individual node is functionality that is available only to the selected node.



The functionality available to individual nodes only is:

- **Reset Environment** – Resets the environment for the selected node only. Other nodes will continue using the config.xml that is in cache.
- **Cache** – Displays the current program listing in cache. On this page you can refresh cache to get the latest program listing or clear cache for the selected node.
- **Services** – Contains the management, properties, and messages for the Insbridge Connector Service, Message Process and the Insbridge Task Manager
- **Logs** – Displays the error and audit logs for the selected node. On this page you can view all general, batch, or impact analysis error logs or XML, SQL, or SoftRater Runtime Export audit logs.

These actions can only be performed under the node where you want to action to take place.

## Reset Environments

To reset an environment for a specific node, select the **Reset Environments** link under the node that you want to reset. The Reset Environment Configuration:<NODE> window is displayed. The node that is going to be reset is displayed.

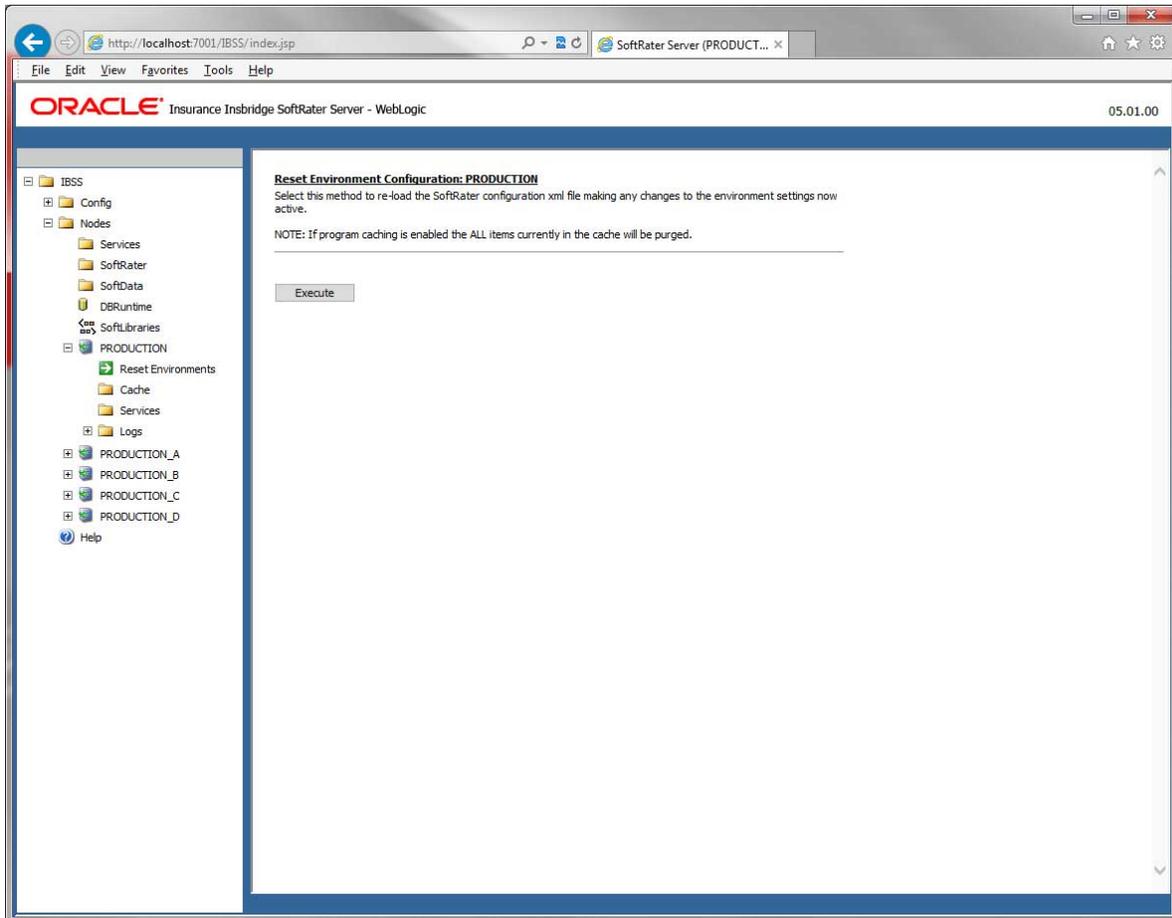


Figure 82 Resetting a Node

5. Click the Execute button. A confirmation window is displayed.

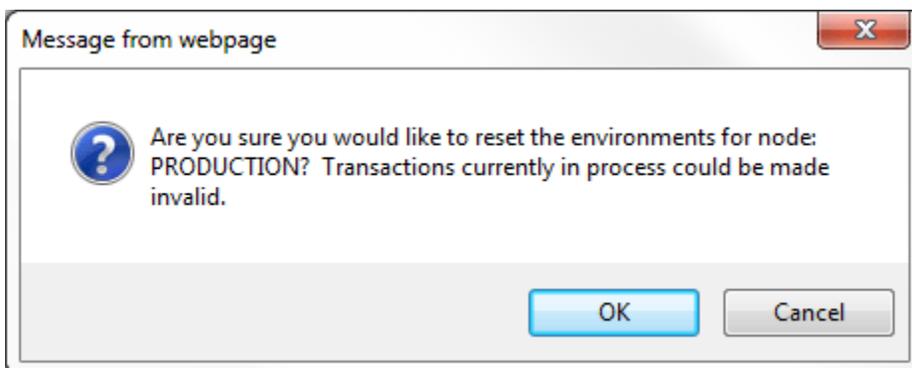


Figure 83 Confirming a Node Reset

6. Click OK to reset the environment. Click Cancel to return to the previous screen. No action will be taken.
7. The screen refreshes and the environment has been reset.
8. A confirmation window is displayed with a success or fail message.

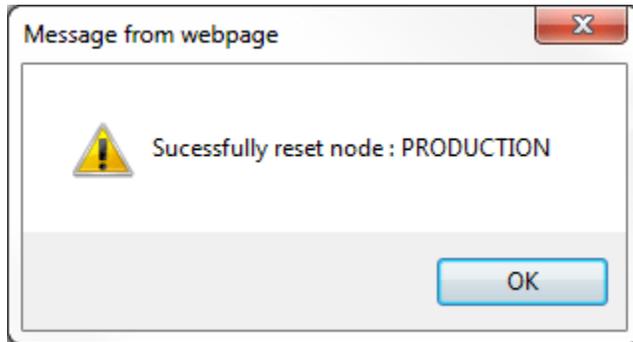


Figure 84 Successful Rest

An individual environment may need to be reset to activate changes to an environment. Changes do not take effect until the SoftRater configuration XML file is reloaded. This is the purpose of an environment reset.

---

**NOTE:** *Resetting environments causes all information in the cache to be purged and any transactions currently processing could be made invalid.*

---

## CACHE

**Cache** is available to the individual node. Select the Cache link under the node where you want to view or clear cache. The Program Cache Options window is displayed. This page allows you to view a listing of all the programs currently in the cache and remove a specific program from the cache or clear the entire cache. If there is no cache, check to see if cache has been enabled on the Config->Engine page.

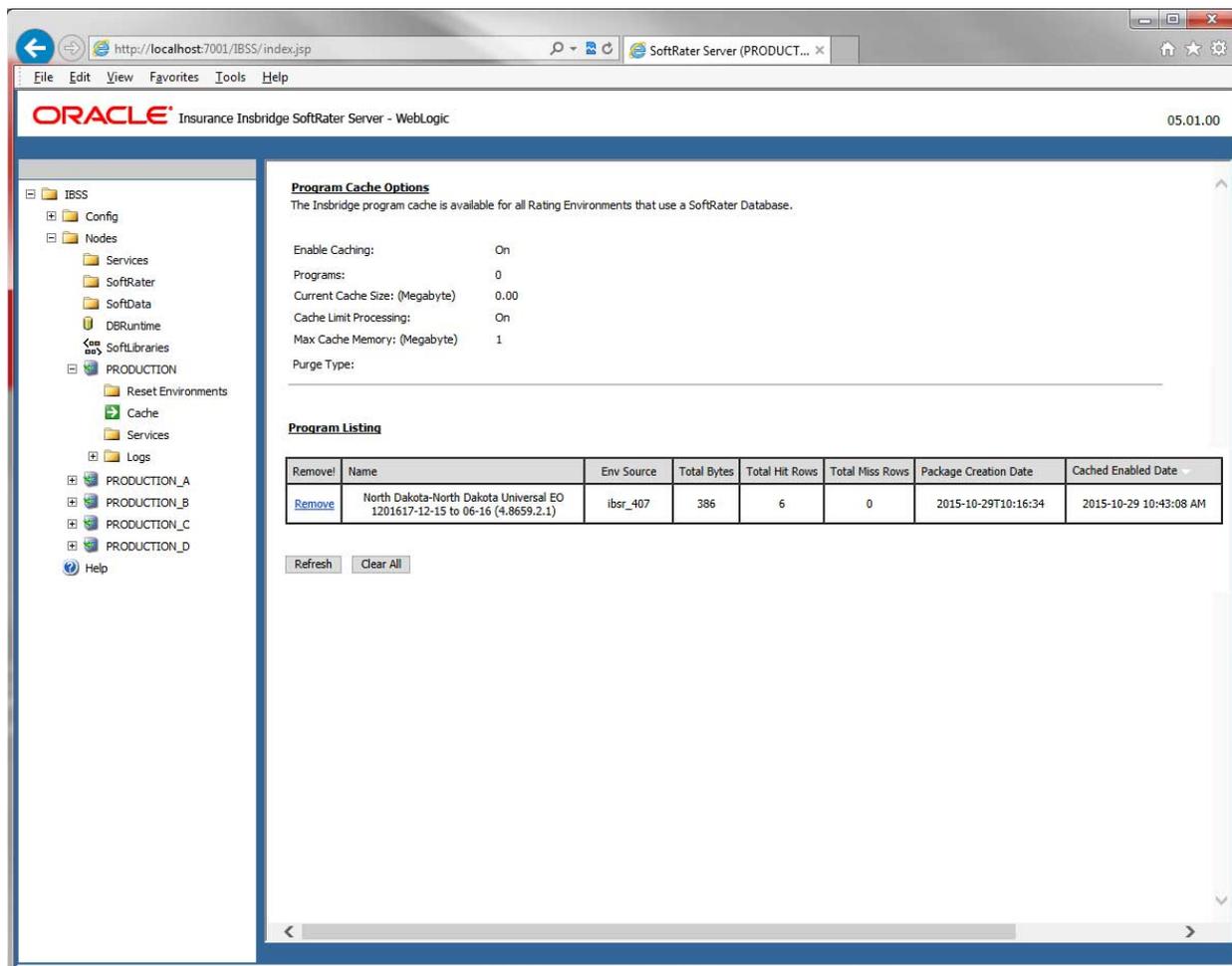


Figure 85 Program Cache

The Information in the upper part of the screen is the settings from the Config->Engine page. This is a read-only view. Settings can only be changed on the Config->Engine page. Information includes:

- **Enable Caching:** Displays whether cache has been enabled on the Config->Engine page.
- **Programs:** The number of programs in cache.
- **Current Cache Size:** The current size of cache for the node.
- **Cache Limit Processing:** Displays whether cache limit processing has been enabled on the Config->Engine page.
- **Max Cache Memory:** The current maximum value set on the Config->Engine page.

- **Purge Type:** The type of purge selected on the Config->Engine page.

## Removing a Program from the Cache

To remove a specific program from the cache, use the **Remove** hyperlink next to the desired program. All information for that program (in the specific environment) will be removed from the cache. If information exists in the cache for the same program in different environments, removing the information from one environment does not remove it from the other environments.

If no programs are available for removal, the Remove hyperlink will not be displayed.

## Cached Program Listing

The Cached Program Listing is displayed only when program cache settings are enabled. Cached program listing shows programs that have information stored in the cache. If more than five programs have information stored in the cache, use the < back and next > hyperlinks to navigate between the pages.

**Remove:** Removes the corresponding program's data (hits and misses) from the cache.

**Name:** The name of the program.

**Env Source:** The name of the environment the program was rated in.

**Total Bytes:** Total bytes of the program.

**Total Hit Rows:** Total number of hits stored for the corresponding program.

**Total Miss Rows:** Total number of misses stored for the corresponding program.

**Package Creation Date:** Time stamp of when the package was created for the corresponding program.

**Cache Enabled Date:** Time stamp of when information was first stored in the cache for the corresponding program.

For additional information on caching, see the SoftRater Caching in the SoftRater User Guide.

## Clearing the Cache

To remove all information from the cache, click **Clear All**. All information will be removed from the cache.

## SERVICES

The Node level Services page allows you to start and stop the Inbridge Connector Service for the selected node. It also allows you to view messages, tasks, and logs for the selected node.

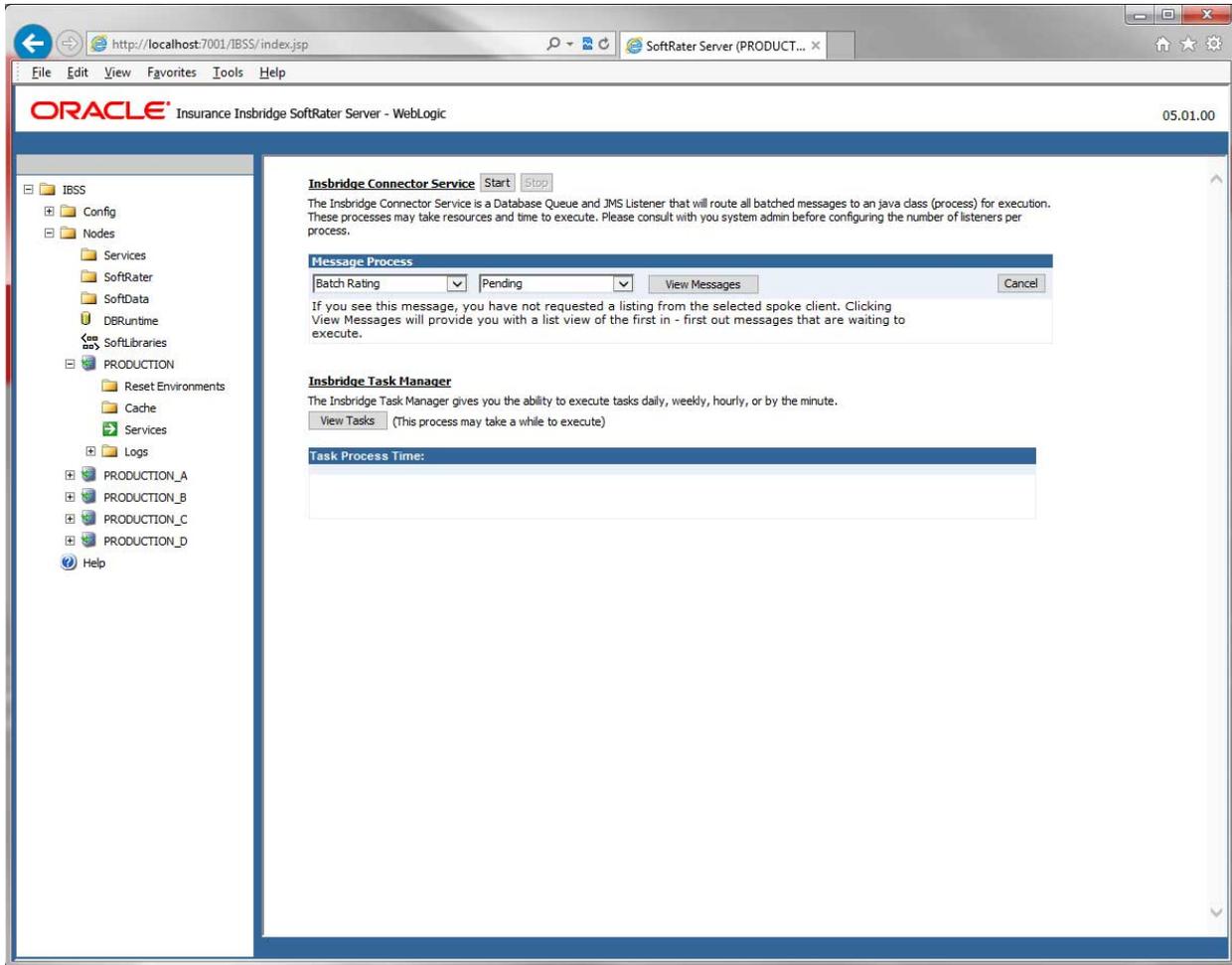


Figure 86 Services

The Inbridge Connector Service for the selected node can be started by clicking the Start button. A status for the node is displayed. Only nodes that are active can be started.

The Message Process and Inbridge Task Manager at the individual node level produce the same types of information found on the Services page higher up. The main difference is that no properties can be set at the individual node level.

For details on the information returned to the Message Process and Inbridge Task Manager, please see [Statuses and Actions for Message Processing](#).

### To View Messages in the Queue

1. Navigate to the **Services** page.

2. Select the appropriate client from the drop down.
  - Batch Rating
  - Impact Analysis
  - Broker - Request
  - Broker - Response
3. Select the status.
  - Pending
  - Processing
  - Completed
  - Failed
  - Canceled
  - Aborted
4. Click View Messages.
5. The listing refreshes and shows any messages that are currently in the queue.
6. To view details on a specific message, click the underlined portion. Information about the message opens in a separate window.
7. To perform an action, click the button at the end of the section.

## LOGS

There are two Logs pages. One is for errors and one is for audits. Both pages show a listing of the logs available. By default, information is only logged when an error occurs. Audit logs must be enabled. This can be done on the Config->Engine page.

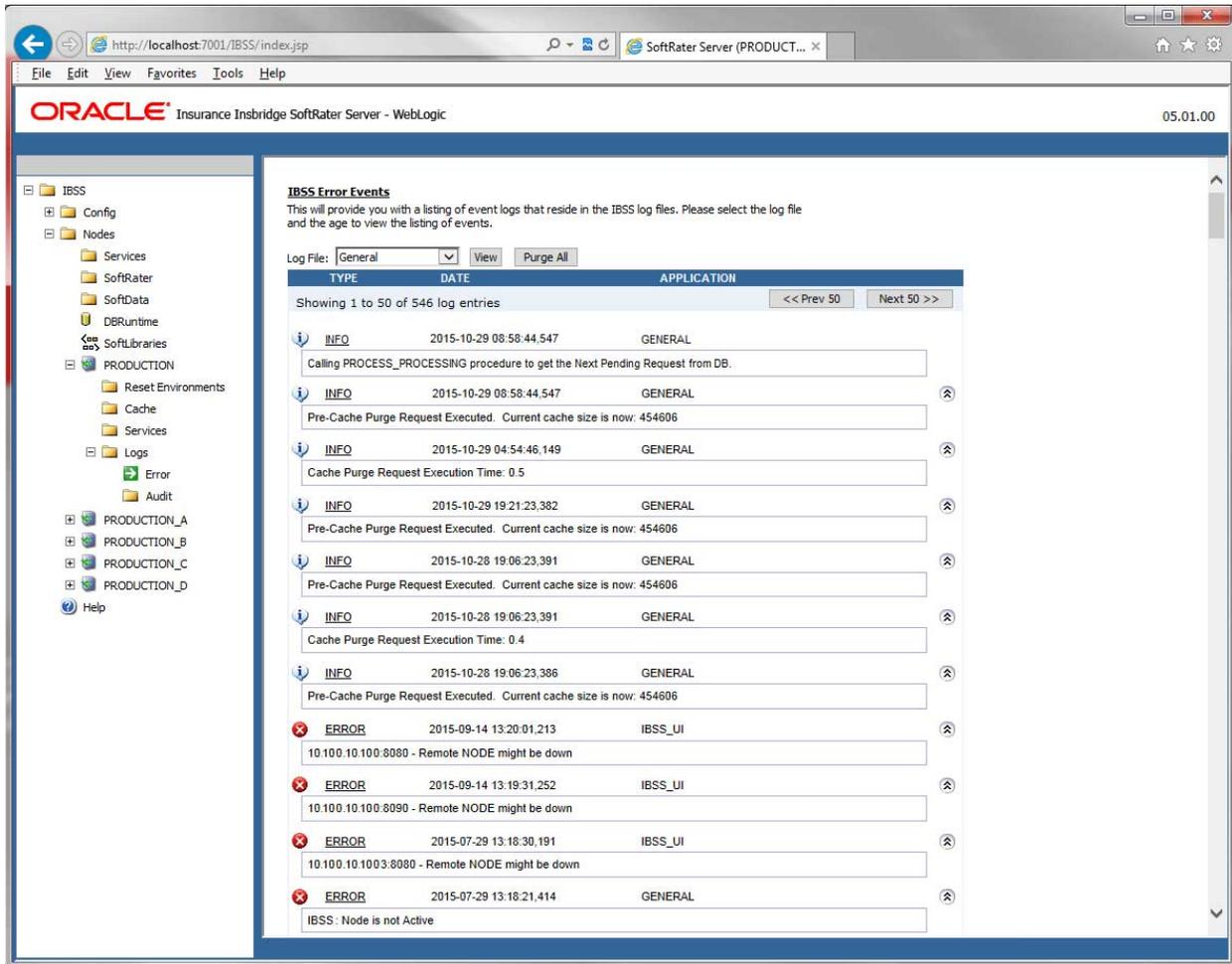


Figure 87 Error Logs Page

### Error Logs

Errors get logged whenever the application encounters an exception. The exception can be with the request execution, the request itself, or with the properties configuration. Details regarding the exception can be found in the error logs.

**General:** General error message logs.

**Batch:** Error logs for batch files.

**Impact Analysis:** Error logs for Impact Analysis.

## Audit Logs

Audit logs are used for tracking the SoftRater engine operations. The Audit logs contain information about the Engine categorized into three different operations, XML, SQL, and SoftRater Runtime Export.

**XML:** Operational XML that triggered some exception processing.

**SQL:** SQL text that has generated some exception processing.

**SoftRater Runtime Export:** Provides an XML view of the entire program that was executed.

To view an error log, click the hyperlink. The log is returned in the text area at the bottom of the screen. If auditing has not been turned on, there will not be any audit logs displayed. To turn audit logging on, please go to the Config->Engine page.

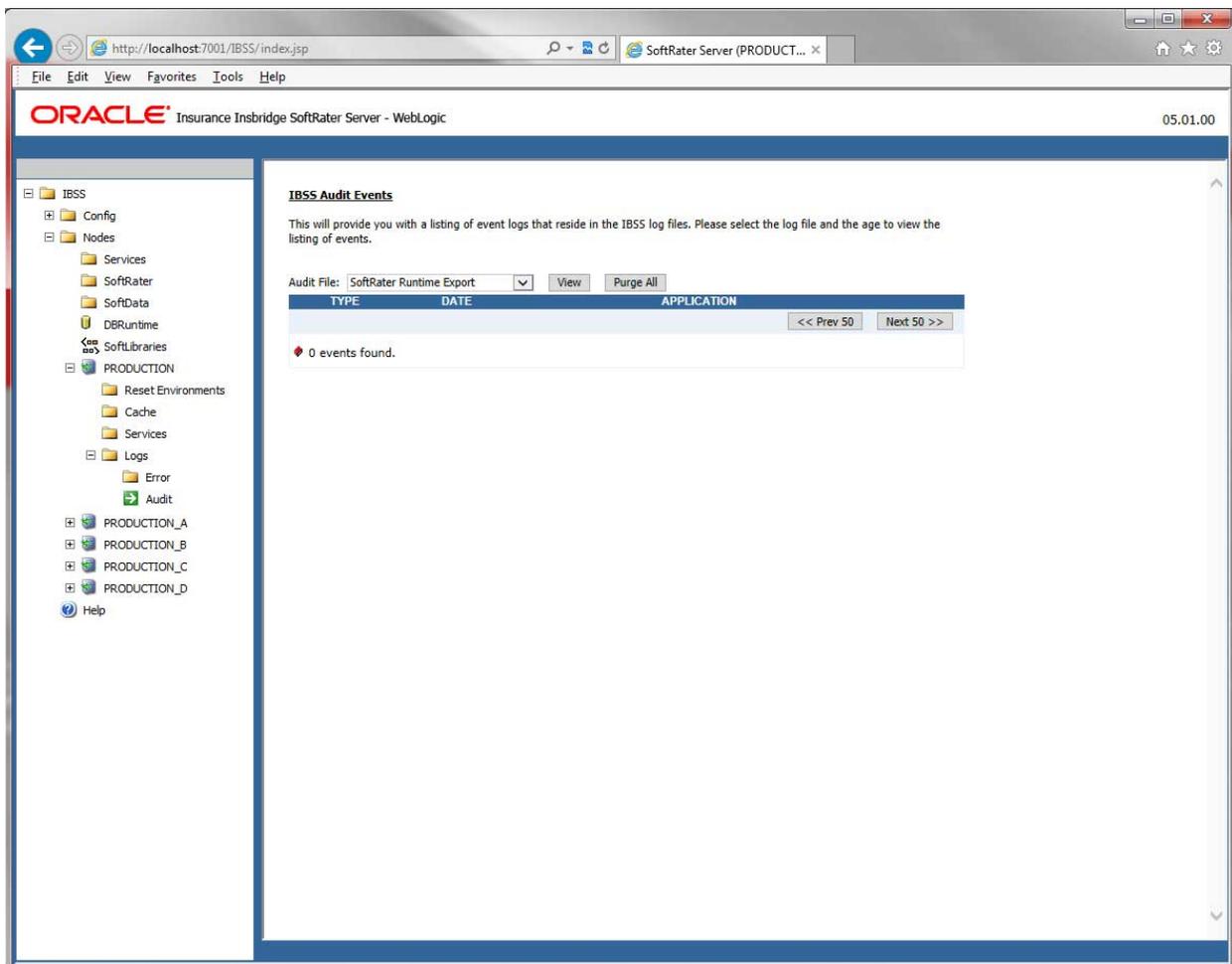


Figure 88 Audit Logs

## Viewing Logs on the Server

If you have access to the server where IBSS was deployed, you can view log files in the Instance folder of the node. Each node has an instance folder where logs are stored. The location of the Instance folder was determined at installation time.

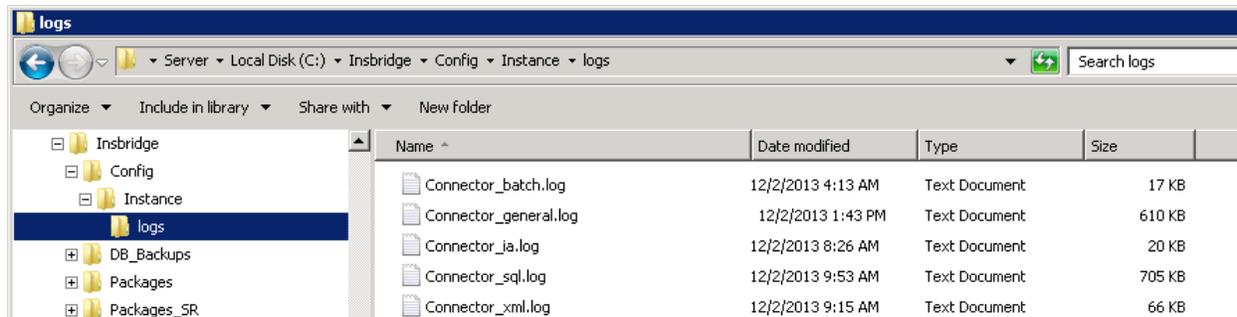


Figure 89 Logs stored on the Server

These are the logging options available and a description of what is being logged in the Instance file.

- **Connector\_batch.log:** This is the error plus information log for batches.
- **Connector\_general.log:** This is the error plus information log. All errors, warnings, requests, results, and such are logged here. Any SoftRater exceptions are logged here also.
- **Connector\_ia.log:** This is the error plus information log for Impact Analysis.
- **Connector\_sql.log:** This log records all database queries sent by SoftRater, including table variable lookup, and global versioning selection.
- **Connector\_xml.log:** This log records all the rating request and result XMLs. The SoftRater.xml log only logs the rating request XML submitted to a SoftRater instance for both synchronous and batch rating requests. At the point a rating request makes it to SoftRater, the request does not distinguish between the two, since the IBFA Spindle web service is what handles the threading of the requests and the aggregation of the results

If XML Audit Logging option is enabled, it contains both <rate> and <result> nodes, so it logs both the request XML and the result XML.

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**NOTE:** Library logging is done on the SoftLibraries page on a per program basis.

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## 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:**

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

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200  
[oracle.com](http://oracle.com)

## GLOSSARY TERMS

| <b>A</b>                           |  |
|------------------------------------|--|
| <b>Administrator:</b>              | The person designated by your company who has the authority to create and change groups, usernames, passwords and restrictions.  |
| <b>Algorithm:</b>                  | A sequence of steps used to perform a calculation.   |
| <b>Assigned Driver:</b>            | A driver who has been assigned to a vehicle.   |
| <b>Assigned Vehicle:</b>           | A vehicle that has been assigned a driver.   |
| <b>Authoring Environment:</b>      | The physical machine where RateManager is installed.   |
| <b>C</b>                           |  |
| <b>Calculated Variable:</b>        | 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. |
| <b>Callouts:</b>                   | 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.  |
| <b>Category:</b>                   | A user defined group of information that defines inputs, variables, algorithms and the overall structure of the program.   |
| <b>Criteria:</b>                   | An input or variable used in a mapped variable to determine which value to return. Any input or variable can be used as a criteria.  |
| <b>D</b>                           |  |
| <b>Data Type:</b>                  | 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.   |
| <b>Date:</b>                       | A data type supported for inputs and result variables only. For more information, see Dates in the Contents section.   |
| <b>Decimal:</b>                    | A data type supported for all types of variables and inputs. Examples of decimal values are 3.1415, 18 and 0.995.  |
| <b>Default Value:</b>              | Used by a mapped variable if no match is found based on the criteria.  |
| <b>Dependency:</b>                 | 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.   |
| <b>Driver Assignment:</b>          | 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.   |
| <b>Driver Assignment Scenario:</b> | 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.  |
| <b>E</b>                       |   |
| <b>Export:</b>                 | 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.  |
| <b>F</b>                       |   |
| <b>Flag:</b>                   | A variable that holds a 1 for true and a 0 for false.   |
| <b>Flag Driver Algorithm:</b>  | An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.  |
| <b>Flag Driver Function:</b>   | 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.   |
| <b>Flag Vehicle Algorithm:</b> | An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.  |
| <b>Flag Vehicle Function:</b>  | 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.  |
| <b>G</b>                       |   |
| <b>Global:</b>                 | An input or variable that is available to all programs under a specific subline.  |
| <b>Global Input:</b>           | A value that is passed into the rating system.  |
| <b>Global Result:</b>          | A value that is passed out of the system after rating.  |
| <b>Group:</b>                  | A set of users that have the same access rights.  |
| <b>I</b>                       |   |
| <b>IBER:</b>                   | Insbridge Enterprise Rating System. This is the entire system.  |
| <b>IBFA:</b>                   | 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.   |
| <b>IBSS:</b>                   | 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. |
| <b>IBRU:</b>                   | The previous acronym used by the Insbridge system. The IBRU acronym may still be used in some areas of the system.  |
| <b>If:</b>                     | A step type available for use in calculated variables and algorithms. For more information, see If in the contents section.   |
| <b>Import:</b>                 | 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.  |
| <b>Input:</b>                  | A value that is passed into the rating system.  |
| <b>Integer:</b>                | A data type supported for all types of variables and inputs. Examples of integer values are 3, 1859865 and -47.   |
| <b>Interpolation:</b>          | An estimated value derived from two known values.   |
| <b>L</b>                       |   |

|                                 |  |
|---------------------------------|--|
| <b>Library:</b>                 | The Library is where templates are stored and managed.   |
| <b>Linked Variables:</b>        | Two or more mapped variables that have been associated with one another because they use the same criteria.  |
| <b>Lock:</b>                    | A lock will close all associated Variables, Algorithms, Driver Assignments, Sequencing and Result Mappings in a program version from deletions and edits.  |
| <b>Logical Environment:</b>     | 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. |
| <b>M</b>                        |  |
| <b>Mapped Variable:</b>         | A variable that uses other variables and inputs as criteria in determining the appropriate value. See Mapped Variables in the Contents section for more information.   |
| <b>Mask:</b>                    | A feature that allows the customer to determine how data should be interpreted. See Masking in the Contents section for more information.  |
| <b>N</b>                        |  |
| <b>Naming Standard</b>          | A uniform naming structure to system elements and programs.  |
| <b>Normal Rating Algorithm:</b> | The most common type of algorithm. Examples of what it can be used for are: <ul style="list-style-type: none"> <li>• Determine premiums</li> <li>• Calculate differences in limits being passed into the system vs. limits being rated by the system</li> <li>• Assign tiers</li> </ul>      |
| <b>O</b>                        |  |
| <b>Operator:</b>                | A built-in mathematical function used in calculations and comparisons.   |
| <b>P</b>                        |  |
| <b>Package:</b>                 | A small file that holds all the RateManager logic for a specific program and version.  |
| <b>Package Location:</b>        | A pointer to a location where SoftRater Packages (SRP's) are stored.   |
| <b>Physical Environment</b>     | A physical environment is generally referred to as a physical machine.   |
| <b>Program:</b>                 | 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.  |
| <b>Program Date Mask:</b>       | Specifies how SoftRater interprets dates being passed into an input file.  |
| <b>Program Folders:</b>         | A RateManager file management system that functions in much the same way as Microsoft Windows Explorer. This multi level setup allows for an unlimited number of program folders and subfolders to be placed underneath a subline.   |
| <b>R</b>                        |  |
| <b>Rank Driver Algorithm:</b>   | An algorithm used by a Rank Driver Function to rate drivers based on certain criteria.   |
| <b>Rank Driver Function:</b>    | 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.   |
| <b>Rank Vehicle</b>             | An algorithm used by a Rank Vehicle Function to rate vehicles based on   |

|                               |   |
|-------------------------------|---|
| <b>Algorithm:</b>             | certain criteria.   |
| <b>Rank Vehicle Function:</b> | 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.   |
| <b>Rating Environment:</b>    | The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.   |
| <b>Reconcile:</b>             | A comparison feature that compares one program version against another version in the same program and generate a report of the differences.  |
| <b>Restrictions:</b>          | Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator.  |
| <b>Result Mapping:</b>        | A defined set of results, inputs and variables displayed in the output file.  |
| <b>Revision:</b>              | A variable specific type of versioning. See Versioning in the Contents section for more information.  |
| <b>RM:</b>                    | RateManager. RateManager is a component within Insbridge that enables users to manage the product definition and modification process, including rating and underwriting logic.   |
| <b>S</b>                      |   |
| <b>Sequence:</b>              | The order in which algorithms run. See Sequencing in the Contents section for more information.   |
| <b>SoftLibrary:</b>           | 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   |
| <b>SoftRater Node</b>         | A SoftRater node is either an IBFA (without RateManager) or IBSS instance on a physical environment.  |
| <b>Source:</b>                | The source is the creator of a template and will also be the name of the new subline.   |
| <b>SR:</b>                    | 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. |
| <b>SRP:</b>                   | SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.  |
| <b>SR-JAVA:</b>               | SoftRater for Java. This is also another name for IBSS.   |
| <b>SR-WIN:</b>                | SoftRater for Windows. This is also another name for IBFA.  |
| <b>String:</b>                | 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".   |
| <b>Subline:</b>               | Sublines are classifications that fall in between lines of business and program folders. Sublines allow for the separation of programs by source.   |
| <b>T</b>                      |   |
| <b>Tab-delimited:</b>         | A type of text file in which columns are separated by tabs. This is the required format for importing tables into RateManager.  |
| <b>Template:</b>              | Templates are exact copies of existing programs that can be from within your own user group, any other user group within the company or even from an outside company.   |
| <b>U</b>                      |   |
| <b>Unassigned Driver:</b>     | A driver who has not been assigned to a vehicle.  |

|                                |  |
|--------------------------------|--|
| <b>Unassigned Vehicle:</b>     | A vehicle that has not been assigned a driver.   |
| <b>Underwriting Algorithm:</b> | A type of algorithm used to determine if a policy meets the requirements of the company.   |
| <b>V</b>                       |  |
| <b>Variable:</b>               | A name used to represent a value that can change. See Variables in the Contents section for more information.  |
| <b>Version:</b>                | One of a sequence of copies of a program, each incorporating new modifications. See Versioning in the Contents section for more information.   |
| <b>VFS:</b>                    | Virtual File Servers. Virtual file server management allows you to set up servers that are in different locations where packages can be downloaded.  |
| <b>W</b>                       |  |
| <b>Wildcard:</b>               | An option available for mapped variables that tells RateManager that one or more rows ignore the value passed in for the criteria. See Variables in the Contents section for more information. |
| <b>Working Category:</b>       | A classification used to define how elements should run. See Categories in the Contents section for more information.  |
| <b>X</b>                       |  |
| <b>XML ID:</b>                 | A number automatically assigned by RateManager to identify inputs and categories.  |

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