

**Oracle® Insurance IStream**

IStream Document Manager Glossary

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# Chapter 1

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## IStream Glossary

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- [W](#) - [X](#)

### A

#### **Add-In**

A small application that is embedded within a larger application and which contains specific [IStream Document Manager](#) functionality. Also known as a *plug-in*.

The available add-ins are:

- *IStream Assembler Add-in for Microsoft Word* on page 9
- *IStream Author Add-in for Microsoft Word* on page 10
- *DMS Plug-in for IStream Author* on page 7

#### **Administrator**

A type of [Role](#). An Administrator's duties including creating and maintaining user profiles. See also *System Administrator* on page 14.

#### **After**

A [Customization Mode](#) that inserts the [Custom Wording](#) after a [Tagged Text Block](#).

#### **Assembled Document**

See *IStream Document* on page 10.

#### **Assembler/Assembly**

See *IStream Assembler* on page 9.

#### **Assembler Add-in**

See *IStream Assembler Add-in for Microsoft Word* on page 9 and *IStream Assembler Add-in for Microsoft Word* on page 9.

#### **Assembly Server**

See *IStream Assembly Server* on page 9.

### **Assembly Toolkit**

See *IStream Assembly Toolkit* on page 9.

### **Attribute**

A field or data value that describes a document or other item, that is stored as metadata to use in searches in the [DMS](#). For example, the policy number 123 is an attribute value of the policy. Attributes allow you to search for specific documents.

### **Author**

See *IStream Author* on page 9.

### **Author Add-In**

See *IStream Author Add-in for Microsoft Word* on page 10.

### **Authoring Language**

The technical vocabulary or code that consists of various [Rules](#), [Variables](#) and [Functions](#). This code controls how data is retrieved from the system and how the [IStream Document](#) will be assembled during the [Generation](#) process.

Also called *code*, *IStream code* and *model document language*.

## **B**

### **Before**

A [Customization Mode](#) that inserts a [Custom Wording](#) before a [Tagged Text Block](#).

### **Business Variable**

A variable used in [Model Documents](#). It consists of the '@' symbol, a [Variable](#) name and an optional index name.

## **C**

### **Calligo**

The previous name for [IStream Document Manager](#).

### **Category**

A classification or type of group of documents and other items in the [DMS](#). For example, car insurance can be a category. This is a line of business within an insurance company; you would typically want to search within that category.

### **CDS File**

See *Section* on page 14.

### **Checked In**

A state that a document enters when it is closed. After you check in a document, it becomes unlocked, or unreserved, in the [DMS](#). Someone else can open (or *check out*) the document to customize it.

### **Checked Out**

A state that a document enters when it is opened. After you check out a document, it becomes locked, or reserved, in the [DMS](#). No one else can customize the document until it is [Checked In](#) again.

**Communicator**

See *IStream Communicator* on page 10.

**Compilation**

The process of converting a [Master Section](#) or a [Section](#) and all of its related elements into a format that can be used to generate an [IStream Document](#). Compare with *Generation* on page 8.

**CMS File**

See *Master Section* on page 12.

**Code**

See *Authoring Language* on page 6.

**Customization**

The process of applying [Custom Wordings](#) to a document.

**Customization Mode**

A type of change that you can make to a document. The four mode types are: [Before](#), [After](#), [Replace](#) and [Delete](#).

**Customizer**

See *IStream Customizer* on page 10.

**Custom Wording**

Changes applied to a [Tagged Text Block](#) of a specific [IStream Document](#).

**D****Delete**

A [Customization Mode](#) that removes a [Tagged Text Block](#).

**DMS**

The Document Management System portion of [IStream Document Manager](#).

**DMS Plug-in for IStream Author**

An [Add-In](#) that allows you perform [DMS](#) functionality within [IStream Author](#).

**Document Assembly**

See *IStream Assembler* on page 9.

**Document Manager**

See *IStream Document Manager* on page 10.

**Double Pipe**

A method of syntax for specifying [InfoSources](#), consisting of two pipe characters (||). It is not supported by the [File System InfoSource](#). See also *Single Pipe* on page 14.

**E****EasyText**

A feature in [IStream Author](#) that allows you to easily drag and drop a formatted text item into a [Model Document](#).

**Effective Date**

A date that indicates when a section or custom wording will be included in a document. Effective Dates are used with [Termination Dates](#) to specify a date range.

In [IStream Author](#), the Effective Date determines which [Sections](#) should be included in the [IStream Document](#).

The Effective Date is also the start date of a [Custom Wording](#). An effective date instructs [IStream Assembler](#) when to start including the [Customization](#) in the document.

Effective and Termination Dates also appear in the [Model Document Outline](#).

**Extensibility Toolkit**

See *IStream Extensibility Toolkit* on page 10.

**F****File System InfoSource**

A file system type of [InfoSource](#) that provides access to documents as a flat external file. It recognizes all file types, including those which might not be considered as documents in terms of a [DMS](#). Documents are stored locally or on a network drive, and are generally not shared with other authors.

Compare with *IStreamDM Infosource* on page 10.

**Function**

A command that performs an action on a [Variable](#).

**G****Generated Document**

See *IStream Document* on page 10.

**Generation**

The process of creating an [IStream Document](#) from a [Model Document](#). The generation process retrieves the necessary text from the [Model Document](#) and its [Sections](#), based on the [Model Document's Key Data](#). Compare with *Compilation* on page 7.

**Generation Test Date**

A date for testing [Custom Wordings](#) and document sections that have different [Effective Dates](#).

**I****InfoConnector**

See *IStream InfoConnector* on page 11.

**InfoSource**

An area where documents are produced, managed and stored. There are two categories of InfoSources: those that point to the database that contains the data for the output document, and those that point to document storage ([Repository](#)) locations.



Infosource types include the [File System InfoSource](#), [IStreamDM Infosource](#), [IStreamXML InfoSource](#), [ODBC InfoSources](#) and [User Database InfoSource](#). See also *UISR* on page 16.

### **InfoSource Administrator**

The previous name for [IStream InfoConnector](#).

### **Integration**

See *IStream Document Manager Integration* on page 10.

### **IStream**

The product name for the IStream suite of applications.

### **IStream Assembler**

An application that processes authored [Model Documents](#) and creates generated, or assembled, documents. These documents are called [IStream Documents](#). Assembler provides options for changing the [Repository](#) where the [IStream Documents](#) are stored.

IStream Assembler provides two options for [Generation](#): local and remote. Local generation occurs on the same computer where Assembler is installed (provided that a local IStream Assembler, which comes with [IStream Author Workstation](#), is also installed on the same computer). Remote generation occurs on a remote server through which [IStream Assembly Server](#) is accessed.

See also *Generation* on page 8.

### **IStream Assembler Add-in for Microsoft Word**

An [Add-In](#) within Microsoft Word that allows you to generate or regenerate [IStream Documents](#), and convert your [IStream Documents](#) to PDFs.

### **IStream Assembly Server**

A server that generates [IStream Documents](#). You access it through the [DMS](#) user interface and from [IStream Assembler](#) itself. To generate documents with IStream, there must be one or more [IStream Assembler](#) servers available to the [IStream Document Manager Integration](#) (through Administration). An [IStream Assembler](#) server can be used by one or more IStream servers and each IStream server can use one or more [IStream Assembler](#) servers.

### **IStream Assembly Toolkit**

The portion of the [IStream Toolkit](#) that allows you to access IStream document [Generation](#) functionality with other applications.

Compare with *IStream Extensibility Toolkit* on page 10.

### **IStream Author**

The document authoring software that is part of [IStream Document Manager](#). It allows authors or document specialists to create, edit, and test [Sections](#) and [Model Documents](#). Documents can range from complex, multi-page, multi-format contracts, to statements with extensive [Customization](#), and even simple correspondence. See also *DMS Plug-in for IStream Author* on page 7 and *IStream Visualizer* on page 11.

IStream Author features include [EasyText](#), [IStream Visualizer](#), and the [Model Document Outline](#).

**IStream Author Add-in for Microsoft Word**

An [Add-In](#) within Microsoft Word that allows you to create new [Sections](#), convert Word files to [Sections](#) or [Master Sections](#), generate or regenerate [IStream Documents](#), and convert your [IStream Documents](#) to PDFs.

**IStream Code**

See *Authoring Language* on page 6.

**IStream Communicator**

A web-based application that automates the process of creating and managing a wide range of personalized correspondence types, and delivering these through multiple channels.

**IStream Customizer**

An application that helps modify your document to include changes in the text that apply for specified periods of time or to specific documents or generations of documents. These changes are regenerated as a new document during the time the wordings are in effect; however, you cannot make permanent changes to the [Model Document](#) on which the changed document is based.

Customizer is useful where there is a need to customize documents in a very controlled way and retain those [Customizations](#) during subsequent document regenerations.

Customizer is an optional add-on in [IStream Document Manager](#).

**IStream Document**

A generated document based on a [Model Document](#). IStream documents are created by generating documents in [IStream Author](#) or [IStream Customizer](#). If an IStream document contains [Custom Wording](#) tags, it can be customized in [IStream Customizer](#).

Also called a *generated document*, *.CLG file*, or an *assembled document*.

**IStreamDM Infosource**

A type of [InfoSource](#) where documents are stored on the IStream [DMS](#). You may store your [Model Documents](#) can be stored on the DMS, where many people can access them. They are also available to others who can generate [IStream Documents](#) from these models documents. Compare with *File System InfoSource* on page 8.

**IStream Document Manager**

A suite of integrated applications for creating, managing and distributing personalized, complex documents. It includes document assembly, document management, search, workflow, collaboration and customization functionality. See also *DMS* on page 7.

**IStream Document Manager Integration**

Incorporates [IStream Document Manager](#) functionality (Object types and so on) within the [DMS](#). It Includes the [IStream Modules](#) and [IStream Servlet](#).

**IStream Extensibility Toolkit**

The portion of the [IStream Toolkit](#) that allows other applications to access repositories and the [DMS](#).

Compare with *IStream Assembly Toolkit* on page 9.

**IStream InfoConnector**

An application for managing multiple [InfoSources](#) so that you can take advantage of on-site business knowledge in more than one data source. (Previously called the *InfoSource Administrator*.)

**IStream Modules**

A set of components that the [DMS](#) uses. They include the [IStream Servlet](#) and [IStream Proxy Server](#). The IStream modules allow you to generate, regenerate and compile [Model Documents](#) and render them to PDF files. They are also part of [IStream Document Manager Integration](#).

**IStream Proxy Server**

A server that is required for compiling [Model Documents](#) and rendering PDF files. It is installed with the [IStream Assembler](#) components.

**IStream Publisher**

An application that allows you to use pre-defined services for document retrieval, assembly, rendering, delivery and storage, and allows you to define custom services.

**IStream Servlet**

A servlet that allows you to generate, regenerate and compile [Model Documents](#). It is part of [IStream Document Manager Integration](#).

**IStream Toolkit**

A set of libraries and documentation that allow you to integrate IStream components with your company's or other third party applications.

The toolkit is made up of the [IStream Assembly Toolkit](#) and the [IStream Extensibility Toolkit](#).

**IStream Visualizer**

A module within [IStream Author](#) that allows you to dynamically create charts and graphs.

**IStreamXML InfoSource**

An [InfoSource](#) that uses [XML](#) as the source for data. It may be configured to act as a standard IStream XML [InfoSource](#) or an enhanced XPath (XML Path Language) XML [InfoSource](#). The [IStream Assembler](#) Engine uses the XML [InfoSource](#) during document generation to retrieve data from the XML file.

**IStream Writer**

An application that streamlines the processes of product development, state filing creation and policy production. When used with [IStream Author](#), Writer reduces time and effort required to create [Model Documents](#) that serve as templates for creating customer specific policies, contracts and other documents.

**K****Key Data**

Identifying data that is associated with an [IStream Document](#).

There are two types: persistent and non-persistent.

*Persistent key data* “persists” or stays with the document and is not requested on regeneration.

*Non-persistent key data* is requested each time the document is generated.

When [IStream Publisher](#) creates an [IStream Document](#) that requires both persistent and non-persistent key data, generation problems can occur.

Therefore, avoid using both types of key data in the same document.

**L****Launcher**

An application that allows you to manage the product development process. It provides accountability during the process for tracking and streamlining the cross-functional product development process and uses workflows and collaboration project areas.

You can use Launcher with [Tracker](#) and with a [DMS](#).

**LiveLink**

A third-party application which the IStream [DMS](#) is based on.

**Local Generation**

See *Generation* on page 8.

**M****Master Section**

The primary document in a [Model Document](#). It contains the [Key Data](#) definitions and certain other properties that allow for the assembly of [IStream Documents](#). Master sections have a .CMS file extension. Compare with *Section* on page 14.

**Message Log**

Records all messages sent out by the [IStream Assembly Server](#) during generation.

**MIME**

MIME (Multipurpose Internet Mail Extensions) is a specification for formatting web pages that are not in HTML format.

The MIME type of [IStream Documents](#) is Microsoft Word. The Microsoft Word properties of an [IStream Document](#) allows you to view the document in the browser, the way that it would be printed and distributed.

**Model Document**

A document created in [IStream Author](#) that can contain [Custom Wording](#) tags. Model documents are used to generate [IStream Documents](#). [IStream Documents](#) with [Custom Wording](#) tags can be customized in [IStream Customizer](#).

**Model Document Language**

See *Authoring Language* on page 6.

**Model Document Outline**

A module in [IStream Author](#) that allows you to easily create and maintain your [Model Documents](#) through a “tree view” of a model document’s sections.

Using the Model Document Outline, you can specify effective and termination dates for each section, identify rules for when the section will be included and easily reorder sections.

**Modules**

See *IStream Modules* on page 11.

**O****ODBC InfoSources**

Any ODBC-compliant database you may use as a data source, such as SQL, Access and Oracle. ODBC databases differ from user databases in that they do not contain any mapping, and therefore no SQL queries are hard-coded.

**P****Permission**

An attribute that defines what actions can be performed on a particular document.

**Privilege**

An attribute that defines what actions you can perform on a document.

**Publisher**

See *IStream Publisher* on page 11.

**Proxy Server**

See *IStream Proxy Server* on page 11.

**Q****QuickGen (Quick Generation)**

A feature in [IStream Customizer](#) that enables you to immediately see changes made to a document through adding, editing or removing [Custom Wordings](#). It is similar to [Generation](#) but faster because it does not require [IStream Customizer](#) to connect to the database to retrieve [Variable](#) values.

**R****Regenerating**

The process of creating an existing [IStream Document](#) (by adding all of the [Customizations](#) that have been attached to it) from [IStream Customizer](#), the [DMS](#), [IStream Assembler](#) or the [IStream Assembler Add-in for Microsoft Word](#).

**Remote Generation**

See *Generation* on page 8.

**Replace**

A [Customization Mode](#) that replaces the [Tagged Text Block](#) with a [Custom Wording](#).

**Repository**

A location where files are stored. Repositories are defined as [InfoSources](#) using [IStream InfoConnector](#). [InfoSource](#) repositories include [IStreamDM Infosource](#) repositories and [IStreamFS \(File System InfoSource\)](#) repositories.

**Role**

The type of user in an application. Your role determines what areas of an application you can access and what functions you can perform. You may have more than one role assigned to you.

**Rule**

A command that instructs the system to insert text into an [IStream Document](#) if a particular condition is met.

**S****Section**

The part of a [Model Document](#) that can be referenced by a [Master Section](#). A section contains formatting, text, graphics and some code.

You can use the `INCLUDE` rule in a [Master Section](#) and a [Section](#) to add a section to a [Model Document](#).

Sections have a `.CDS` file extension.

**SDK (Software Development Kit)**

See [IStream Toolkit](#).

**Section Name**

The name of the section of the [Model Document](#) which the [IStream Document](#) was generated from.

**Servlet**

See *IStream Servlet* on page 11.

**Single Pipe**

A method of syntax for specifying [InfoSources](#), consisting of one pipe character (`|`). The single pipe character is not supported by the [File System InfoSource](#). See also *Double Pipe* on page 7.

**System Administrator**

The person who sets up and manages an application. They may be responsible for setting up and managing each [Repository](#), and for ensuring users have the required software required to the application.

See also *Administrator* on page 5.

**T****Tag**

See [Tag Name](#) (below).

**Tag Name**

The name assigned to a [Tagged Text Block](#) by an [IStream Author](#) user. It cannot be changed in [IStream Customizer](#).

**Tag View**

A list of all of the [Tag Names](#), or tags, and [Wording Names](#) that appear in the document.

**Tagged Text Block**

A block of text placed between a TEXT TAG NAME... ENDTEXT rule in [IStream Author](#).

**Template**

A type of Word document (a .DOT file) that contains specific paragraph styles and page layout information. You use templates when creating a [Master Section](#) or [Section](#).

**Termination Date**

A date that indicates when a section or custom wording will no longer be included in a document. Termination Dates are used with [Effective Dates](#) to specify a date range.

In [IStream Author](#), the Termination Date determines which [Sections](#) should no longer be included in an [IStream Document](#).

The Termination Date is also the end date of a [Custom Wording](#). It instructs [IStream Assembler](#) when to stop including the [Customization](#) in the document.

Termination Dates (and [Effective Dates](#)) also appear in the [Model Document Outline](#).

**TEXT...ENDTEXT Rule**

Instructs [IStream Document Manager](#) to treat all text and formatting codes that appear between TEXT ... ENDTEXT as literal text, and to insert it into a document.

**Toolkit**

See *IStream Toolkit* on page 11.

**Tracker**

An application that automates the product development and state filing processes. Tracker allows you to manage filings in a centralized repository and has access to a comprehensive regulatory filing knowledge base. It includes many types of reports to view filings, rates, rules, forms or advertisements and monitor productivity. You can also record and monitor a filing's history through customizable activities.

You can integrate Tracker with [IStream Document Manager](#).

**Tree**

The listing of all the available elements or items within a module.

**U****UISR**

A Universal Information Source Reference. It is a reference to an [InfoSource](#) and a specific file in that InfoSource. A UISR includes an InfoSource name, path, and filename. [IStream Author Reference Wizard](#) helps you build UISRs for the InfoSources you want to access.

**User Database InfoSource**

User databases are associated with a mapping which define a set of hard-coded SQL queries to a user database. IStream assumes that user databases are created and managed with the help of an appropriate Data Base Management System (DBMS) or Relational Data Base Management Systems (RDBMS). Access to user databases and lookup tables is provided through ODBC drivers. Lookup tables can be considered as a particular case of a database table.

**V****Variable**

The data element in a [Model Document](#) that is specific to each generated [IStream Document](#), such as the recipient's name and address. The [Key Data](#) determines the content of a variable when an [IStream Document](#) is generated. After the document is generated, the variables are automatically filled in with the correct information. See also *Business Variable* on page 6.

**Visualizer**

See *IStream Visualizer* on page 11.

**W****Wording Name**

The name assigned to a [Custom Wording](#).

**Wording Properties**

The characteristics of a wording such as [Effective Date](#), [Termination Date](#), and [Customization Mode](#).

**Workflow**

The process which automates your business processes by creating specific roles, rules and business maps.

**Writer**

See *IStream Writer* on page 11.

**X****XML**

eXtensible Markup Language: a general-purpose markup language that uses customizable tags to define data elements.

**XML InfoSource**

See *IStreamXML InfoSource* on page 11.



## Chapter 2

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### Additional Information

This chapter describes:

- *IStream Document Manager Documentation* on page 18
- *Contacting Skywire Software for Help* on page 20

## IStream Document Manager Documentation

IStream Document Manager includes the following documents and online help files. If you need a copy of any of these documents, please contact your system or product administrator.

### General Documentation

- The *IStream Document Manager Release Notes* include general product information, product enhancements and new features, supported platforms and third-party software, assorted considerations, and known issues and limitations.
- The *IStream Document Manager ReadMe* file describes the contents of the installation CD.
- *IStream Document Manager* The *IStream Document Manager Glossary* contains definitions of commonly used IStream terms.

### User Guides and Online Help

- The *IStream Assembler Online Help* describes how to generate documents from sections and model documents.
- The *IStream Assembler Add-in for Microsoft Word Online Help* describes how to perform certain IStream Assembler functions directly within Microsoft Word.
- The *IStream Author User Guide* describes how to create, edit, and test sections or model documents.
- The *IStream Author Add-in for Microsoft Word Online Help* describes how to perform certain IStream Author functions directly within Microsoft Word.
- The *IStream Customizer User Guide* describes how to modify the content of generated documents so that the changes will be applied during subsequent document generations.
- The *IStream Document Manager DMS Guide for IStream and Model Documents* describes how to edit and work with IStream sections and model documents using the DMS user interface.
- The *DMS Plug-in for Author Online Help* describes how to access DMS functionality in IStream Author.
- The *IStream InfoConnector Online Help* describes how to set up and configure IStream InfoSources.

### Advanced Guides

- The *IStream Document Manager Guide for New Installations* explains how to complete a new installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.

- The *IStream Document Manager Upgrade Installation Guide* explains how to upgrade an *existing* installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.
- The *IStream Document Manager Message Reference Guide* contains lists of error, log and SDK messages from the various IStream components. It is for technical users who need additional information about the various IStream messages they receive.
- The *IStream Document Manager Technical Guide* is for system administrators and technical support staff who configure IStream Document Manager and set up links between it and their company's database. This guide is also for those who set up and maintain security groups and operators in the system, and who install, optimize, maintain and troubleshoot IStream Document Manager. It also describes installing and configuring IStream XML InfoSources for interactive and batch generation.
- If you have purchased the IStream Toolkit, the *IStream Assembler* and *Extensibility Toolkit Guides* are installed onto your system. (You can view these guides from the **Start > All Programs > IStream** menu.)

These guides contain detailed descriptions of the components in the IStream Toolkit, or SDK. They are for technical users who need to integrate IStream components with their own or other third party applications.

In addition to the toolkit guides, the *IStream Toolkit SDK Samples Guide* gives an overview of the toolkit samples. The samples are working examples that can help you develop custom applications.

For more information about the toolkit, see the *IStream Document Manager Toolkit ReadMe*.

## Contacting Skywire Software for Help

Customer Support hours are 8:00 A.M. to 8:00 P.M. (Eastern Time), Monday through Friday. Outside of these hours, send us a detailed e-mail message and you will be contacted during regular business hours. Please provide detailed information, as described in the *Support Checklist*.

### Contact Information

**Mail:** Customer Support  
Skywire Software  
19 Allstate Parkway, Suite 400  
Markham, Ontario, L3R 5A4

**Phone:** 1-905-513-7466

**Fax:** 1-905-513-1684

**Email:** [directsupport@skywiresoftware.com](mailto:directsupport@skywiresoftware.com)

**Web:** [www.skywiresoftware.com](http://www.skywiresoftware.com)

### Support Checklist

When contacting Skywire Software Customer Support, please provide the following information:

- Your name, company name, e-mail address, and phone number
- Version numbers of all your Skywire Software products
- Name and version of the network software
- Windows version, including any installed Service Packs
- Microsoft .NET Framework version
- DMS version, including any installed Service Packs (if applicable)
- Microsoft Word version (if applicable)
- Database vendor and version (if applicable)
- Error messages and the circumstances of their occurrence
- A full description of the problem:
  - What happened? What were the sequence of events that preceded the problem?
  - In which screen or window did the problem occur?
  - Was the problem the result of pressing a key?
  - Did the screen freeze? What functions of the software are affected?
  - How many people are affected?