ORACLE
INSURANCE

Oracle Insurance Framework Administrator User Manual

Version 3.12

July 2009

Oracle Insurance Insbridge Rating and Underwriting Framework Administrator (IBFA) User Manual

Part #E15004-01

Library #E15014-01

Formerly P01-753-12

July 2009

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Preface

Welcome to the *Oracle Insurance Framework Administrator User Manual.* This manual describes the settings and options of Oracle Insurance Insbridge Rating and Underwriting Framework Administrator (IBFA). IBFA is a component within the Oracle Insurance Insbridge Rating and Underwriting (IBRU) System that enables administrators to configure Insbridge applications such as Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager) and Oracle Insurance Insbridge Rating and Underwriting SoftRater (SoftRater).

Audience

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

Navigating IBFA

Navigate through Insbridge Framework Administrator using the top and side bar menus. Your browser's tool bars will not be displayed.

System Requirements

System requirements for server and clients can be found in Oracle Insurance Insbridge Recommended Operating Environments Guide. This guide can be obtained from Oracle Insurance Insbridge Support.

Notational Conventions

This section explains the conventions used in this book:

- Menu selections are shown with arrows. For example, the command to select the **Print** choice from the **File** menu looks as follows:

  Select **File ➤ Print**

- File names and path names are shown in **bold**.

- New or emphasized terms are shown in *italics*.

Additional Information

For more information, see these Oracle Insurance resources:

- Oracle Insurance IBRU RateManager User Guide
- Oracle Insurance IBRU PricingManager User Guide
- Oracle Insurance IBRU BatchManager User Guide
- Oracle Insurance IBRU SoftRater User Guide

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-753-01	V 3.5	November 2005	
2nd Edition	P01-753-02	V 3.6	June 2006	Update
3rd Edition	P01-753-03	V 3.7	December 2006	Update Version
4th Edition	P01-753-04	V 3.8	July 2007	Update Version
5th Edition	P01-753-05	V 3.8.3	October 2007	Update Version
6th Edition	P01-753-06	V 3.8.5	November 2007	Update Version
7th Edition	P01-753-07	V 3.8.7	January 2008	Update Version
8th Edition	P01-753-08	V 3.8.8	March 2008	Update Version
9th Edition	P01-753-09	V 3.9	May 2008	Update Version
10th Edition	P01-753-10	V 3.10	October 2008	Update Version
11th Edition	P01-753-11	V 3.11	December 2008	Update Version
12th Edition	P01-753-12	V 3.12	July 2009	Update Version

1

Insbridge Framework Administrator

The Insbridge Framework Administrator (IBFA) is an administrative tool used to configure RateManager and SoftRater. It provides:

- The ability to configure Insbridge applications. All Insbridge applications utilize one Configuration File.
- Access to SoftRater Explore.
- Access to the SoftRater Test Interface.
- Access to the Error Log and Audit Log.
- The ability to start and stop the Insbridge Message Service, as well as view messages.
- The ability to configure the SoftRater Engine.
- Access to the SoftData Test Interface.
- Manage SoftLibraries.

The IBFA can be accessed by going to http://<yourserver>/ibfa, where <yourserver> is the server the IBFA is installed on. This is usually the same server that RateManager is installed on. If you do not know this information, contact your system administrator.

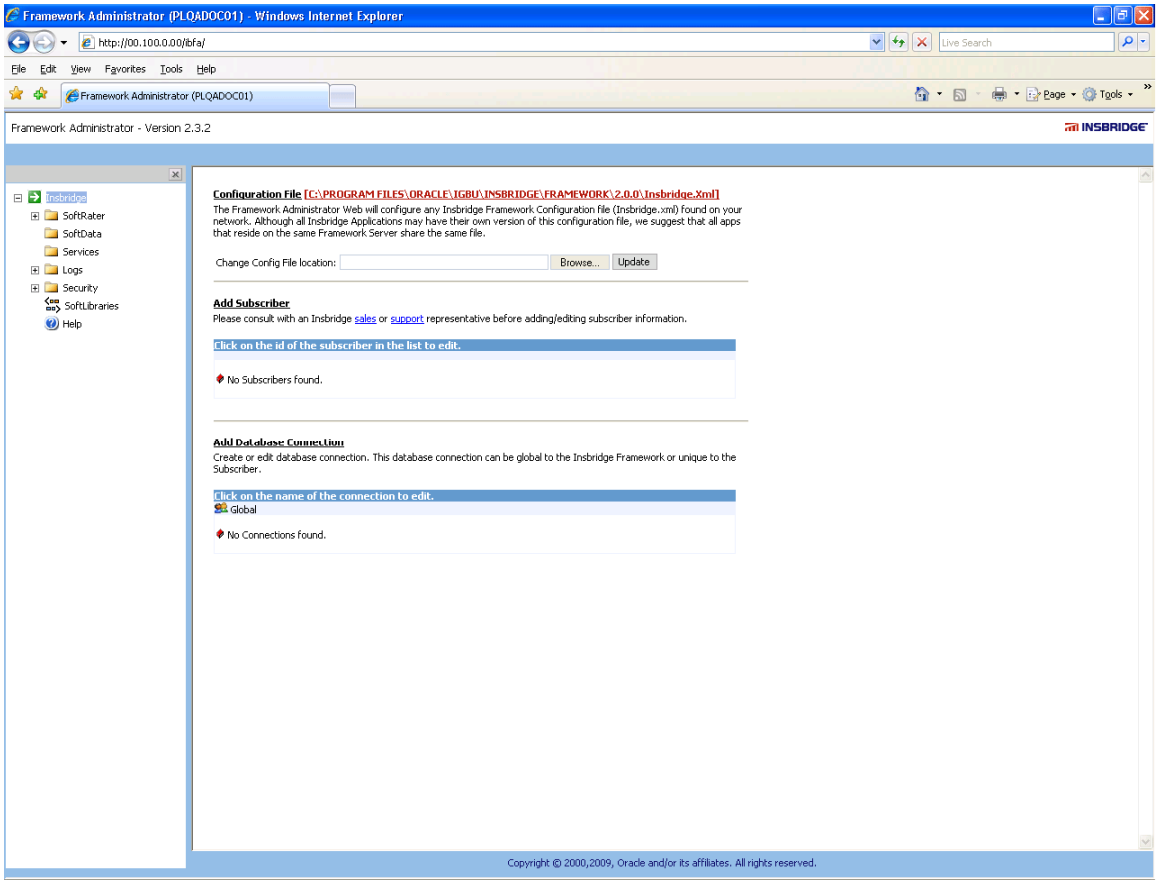


Figure 1 Insbridge Framework Administrator Main Screen

2

Introduction to the Insbridge Page

The Insbridge page is the starting point of the IBFA. The Insbridge page allows you to:

- View the configuration file and change the location
- Set up subscribers
- Set up database connections

Before you can use RateManager or SoftRater, subscriber and database information must be entered on the Insbridge page. This is generally done at installation time, but may be performed at a later date if necessary.

Navigating to the Insbridge Page

1. Using the menu tree, select **Insbridge**.

2. This will open the Insbridge page.

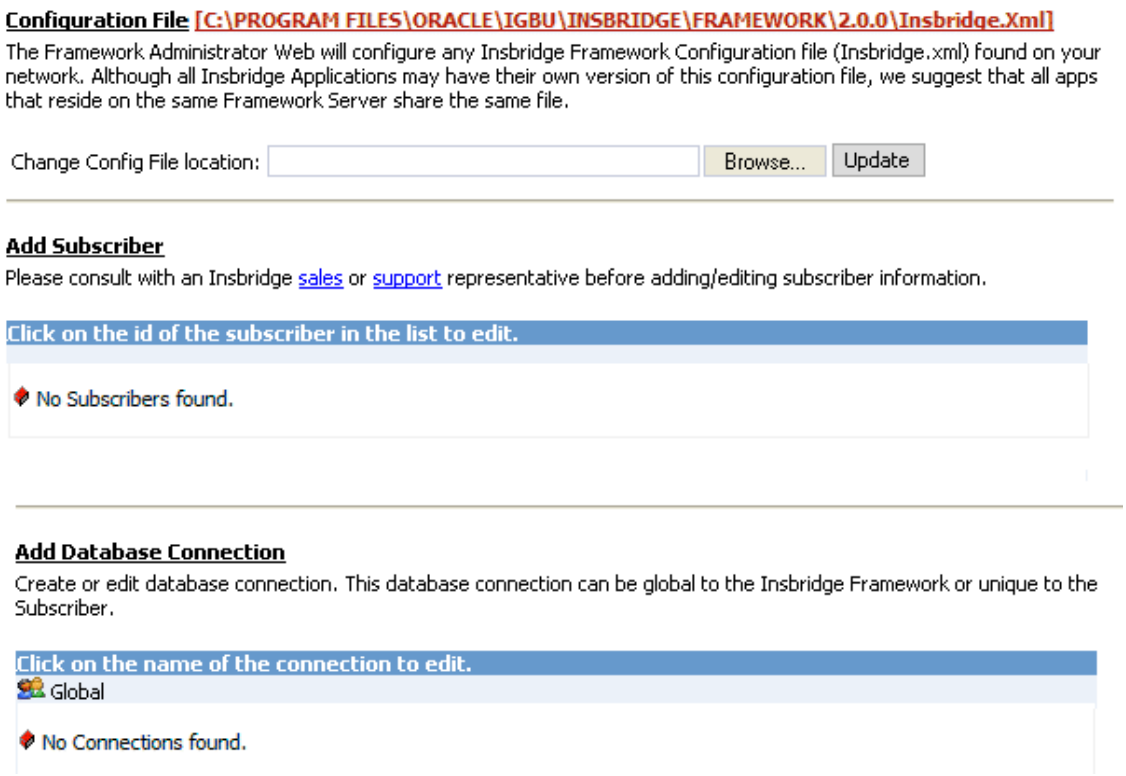


Figure 2 Insbridge Page

3. From here, you can view the configuration file, enter in subscriber information and enter in database connection information.

Configuration File

All Insbridge applications utilize a configuration file (Insbridge.xml). When you make a change to subscribers, environments, etc. using the Framework Administrator, the configuration file gets updated. The configuration file contains settings for:

- Subscribers
- Carriers/Portals
- Environments
- Database Connections
- Security
- Virtual File Servers
- Internet Proxy

While it is possible for each application to use its own version of the configuration file, Oracle Insurance strongly recommends that all applications residing on the same Framework server use the same file.

Viewing the Configuration File

Complete file information will not be available until you have configured your environments.

1. From the Insbridge page, click the underlined configuration file path, **C:\PROGRAM FILES\ORACLE\INSBRIDGE\FRAMEWORK\2.0.0|Insbridge.Xml.**

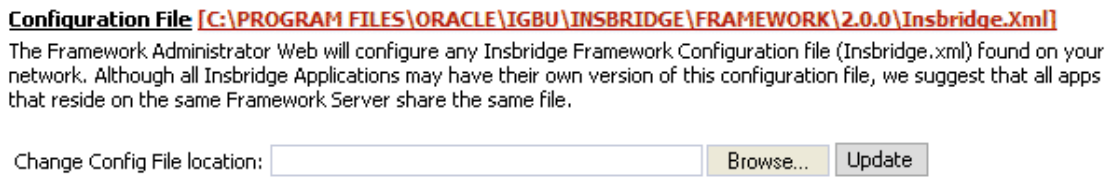


Figure 3 Insbridge Page Configuration File Path

NOTE	If you have an older version of IBFA, you may have a different configuration path **D:\ProgramFiles\InsBridge\Framework\2.0.2\InsBridge.Xml**.

2. The configuration file will open in a new window.

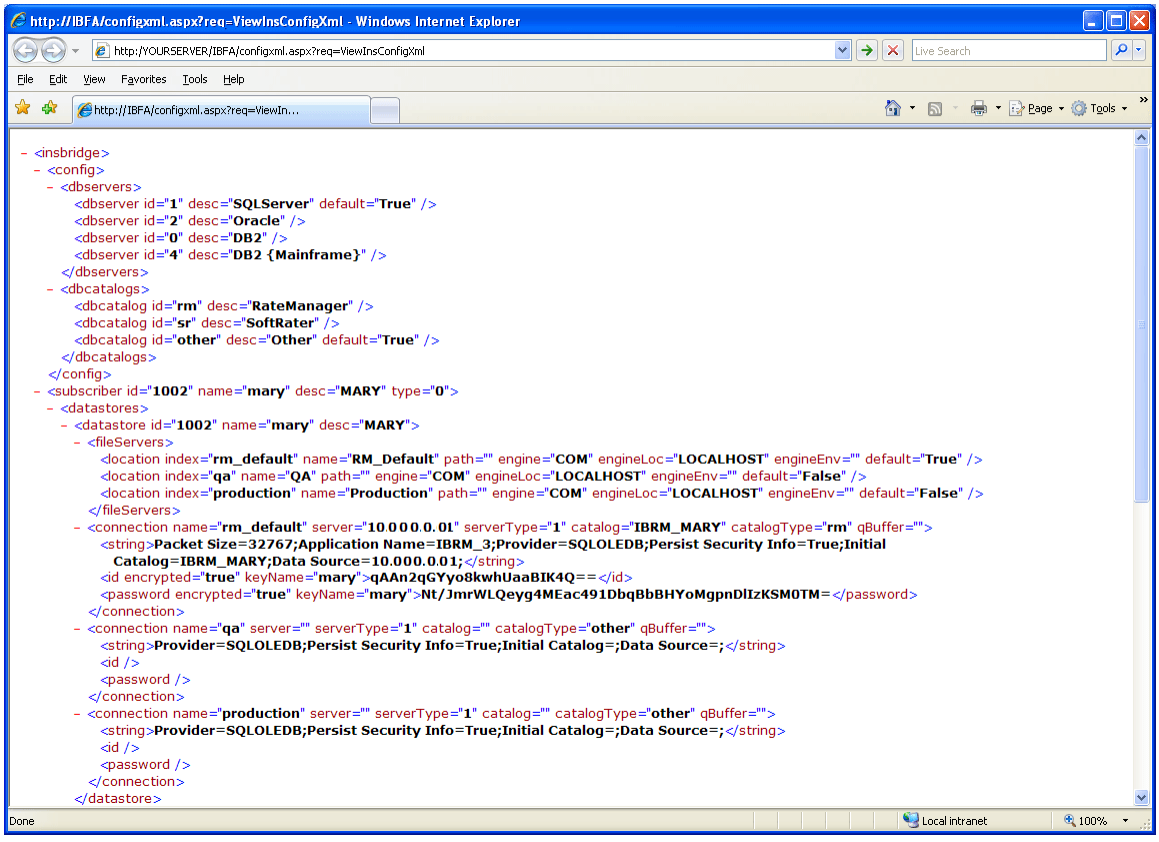


Figure 4 Configuration File New Window

Choosing a Different Configuration File

The Framework Administrator allows you to choose a different configuration file or change where your current configuration file is stored.

1. If the configuration file does not exist in the new location, you can copy the existing configuration file to the new location.

2. From the Insbridge page, enter the new location of the configuration file in the text box next to **Change Config File location** (be sure to include the file name).

NOTE	If you require assistance or are unsure of what action to take, please log a Service Request using My Oracle Support at http://metalink.oracle.com.

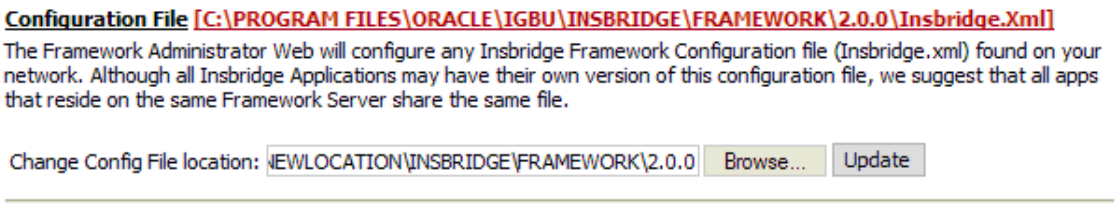


Figure 5 Changing Location of Configuration File

3. When you are finished, click Update.

4. You also can click Browse... to find the new file. After you have selected the new file, click Update.

5. The Insbridge page will refresh and the path to the new configuration file will show. All Insbridge applications will now use the new configuration file.

Introduction to Subscribers

A *subscriber* is typically a single carrier however; a subscriber also can be a portal to many different carriers.

There are two types of subscribers:

- **Carriers** – A carrier is a single entity where all users are managed under the same subscriber ID. Multiple carriers can be created. This allows for different groups within the company to have their own subscriber IDs.

- **Portals** – A portal is a collection of different carriers all managed under one subscriber ID. Portals are most often used by general agencies that do not use RateManager but need a way to manage SoftRater packages.

Subscriber Type and Libraries

Subscriber designation determines what templates can be applied in RateManager. If everyone is under the same subscriber, users will not be able to use the Library to share templates within the company. Users will still be able to apply templates from others outside the company.

If users want to use the Library function to share programs within the company, you must create separate carrier subscribers that define groups within the company. For example, if the company has one group that creates programs for selected areas and another group that creates programs for the remaining areas, each can be set up as separate subscribers. By doing this, each group will be able to use the Library to apply templates from each other.

Adding a Subscriber

Typically, you only need to add a subscriber the first time the IBRU system is installed. The Type, ID and Name information for the new subscriber is chosen by you. The Type, ID and Name are fixed after the first time you save. These entries cannot be edited. Only the description can be edited.

NOTE	If you have more than one instance of IBFA, it is strongly suggested that you create the identical Subscriber, Type, ID and Name in every instance.

The Subscriber ID can be a 3 or 4 digit number and must unique for each subscriber per instance of IBFA. For example, if you have an instance of IBFA on machine A, you can create a subscriber with an ID of 100. On machine A, if you create another subscriber, you must give that subscriber a different ID number, say 200. If you also have an instance of IBFA on a different machine, B for example, you should duplicate the same subscribers with the same ID numbers on machine B.

If you require assistance or are unsure of what action to take, please log a Service Request using My Oracle Support at http://metalink.oracle.com.

1. From the Insbridge page, click the **Add Subscriber** link.

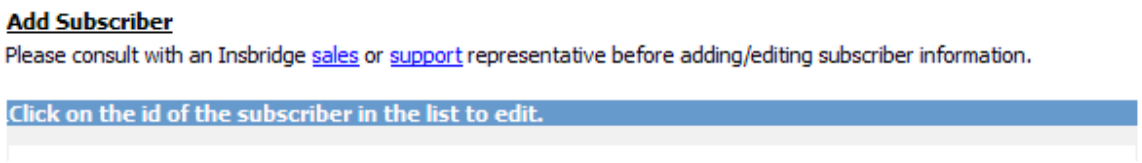


Figure 6 Adding Subscriber Links

2. This will open the **Add Subscriber** window.

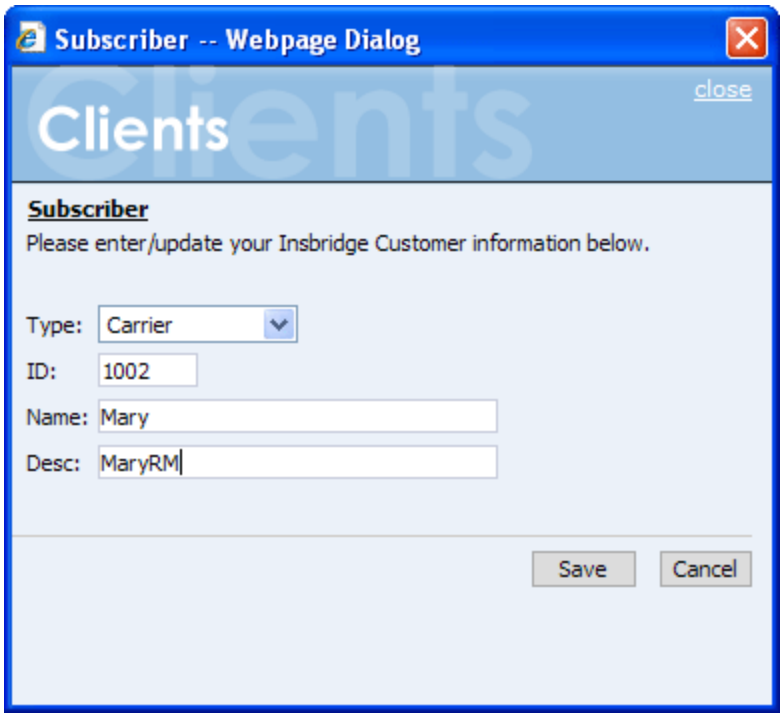


Figure 7 Adding a New Subscriber

3. Enter the **Type, ID, Name** and **Description** for the new subscriber. When you finish entering the information, click **Save**.
4. The new subscriber will now show in the list of subscribers.

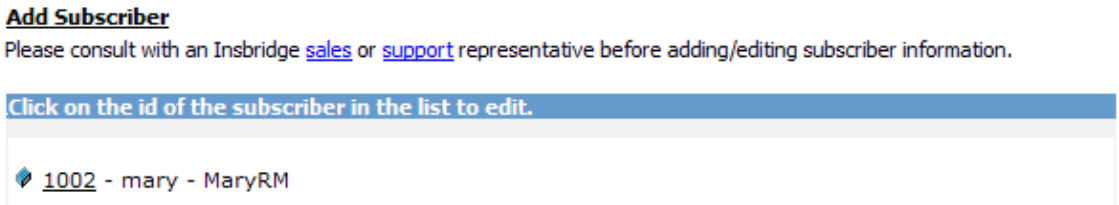


Figure 8 Subscriber List

5. To configure environments, LOB's and virtual servers for a new carrier, see the SoftRater Configuration Page. To configure environments, carriers/portals, LOB's and virtual servers for a new portal, see the Portal Configuration Page.
6. You can edit a subscriber's description by clicking their ID in the subscriber listing. The type, ID and name of a subscriber cannot be edited.

Editing a Subscriber

The only edit you will be allowed to make to a subscriber is the Description. The description becomes important when entering sublines. Sublines are classifications that fall in between lines of business and program folders. Each line of business will automatically have one default subline placed underneath it. This subline will be named with the subscriber description.

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

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 Insbridge page, click the hyperlinked Subscriber ID number (in Figure 9, you would click 1002).

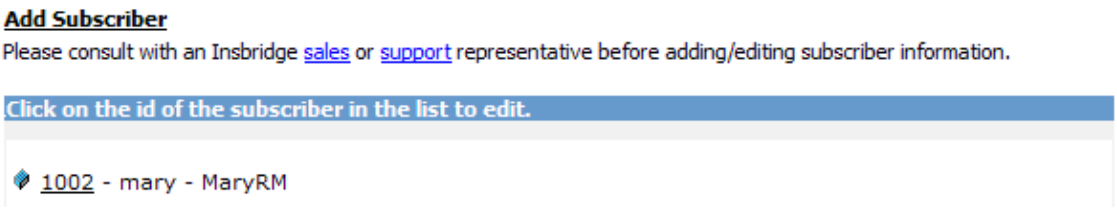


Figure 9 Subscriber List

2. This will open the **Edit Subscriber** window.

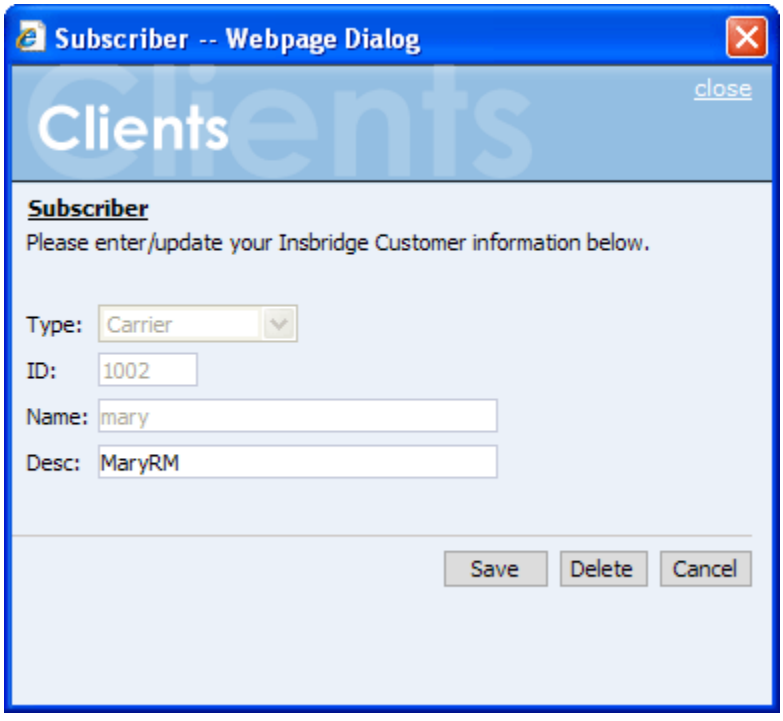


Figure 10 Deleting a Subscriber

3. Click the **Delete** button. A warning message will be displayed. Click **OK** to remove the Subscriber or **Cancel** to return to the previous screen.

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

Introduction to Database Connection

Databases can be added at any time. Depending upon your database type, some fields may be required. When you go to save, if a field is required and you have not entered any information, you will have to correct the error before the database can be saved.

Adding a Database Connection

1. From the Insbridge page, click the **Add Database Connection** link.

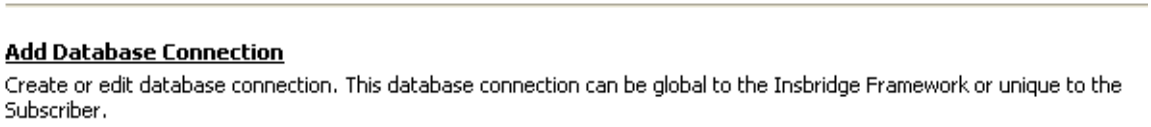


Figure 11 Adding Database Link

2. This will open the **Database Connection** window.

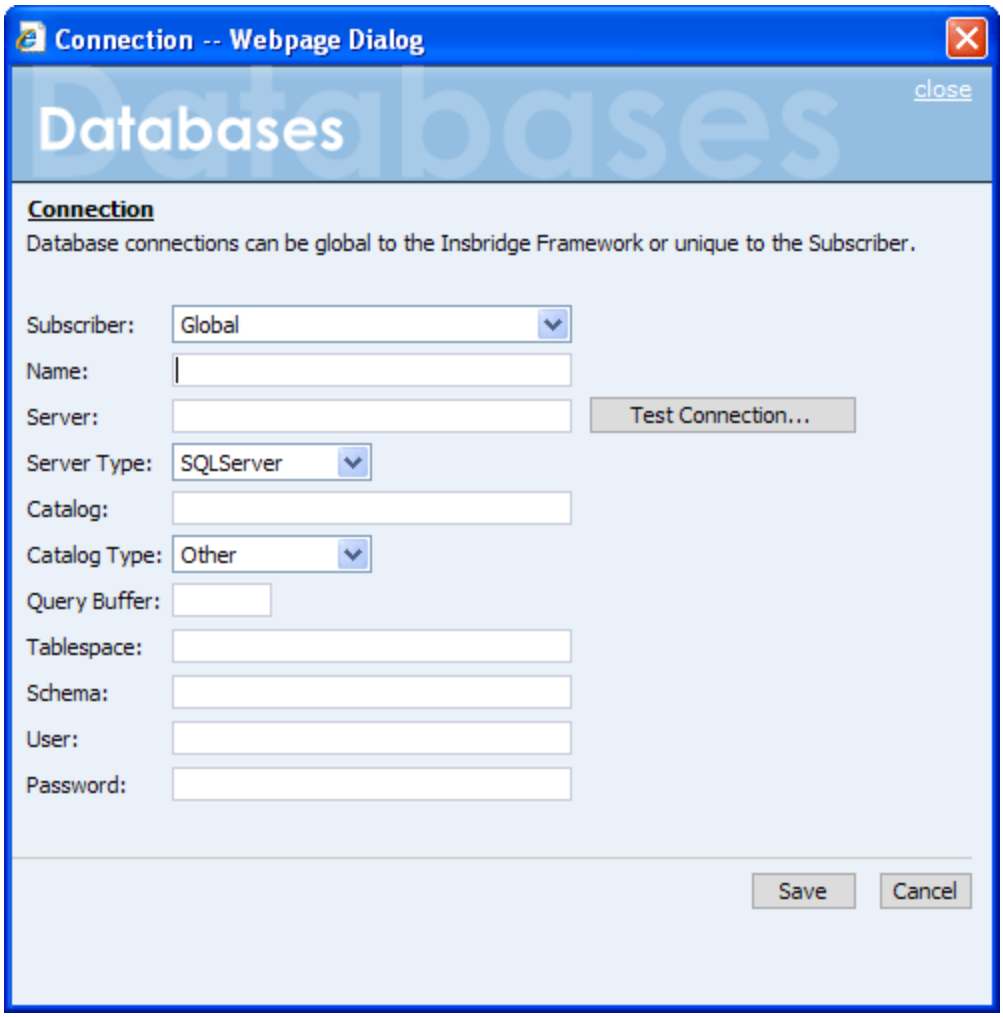


Figure 12 Adding a New Database

3. Select if this is to be a global database or unique to the **Subscriber**. This information cannot be changed once you have saved it.

4. Enter in a Database **Name**. This information cannot be changed once you have saved it.

5. Enter in the **Server** name. This is the name of the server that houses the database. You also can test the connection and make sure it is valid at the time of entry.

6. Select the **DB Server Type**. This is the type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2.

7. Enter in the name of the **Catalog** in the database. For DB2 servers, this is the System DSN Name.

8. Select the **Catalog Type**. This is the type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.

9. Enter in a **Query Buffer**. 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. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.

10. Enter in the name of the **Tablespace** in the database.
11. Enter in the name of the **Schema** that defines the structure of the database.
12. Enter in the **Username** to access the database.
13. Enter in the **Password** to access the database.
14. Click **Save** to save your work.

Editing a Database

You will be allowed to make edits to most fields. The Subscriber and Name fields will not allow for changes. To edit a database, click on the hyperlinked Database Name. This will bring up the Edit Subscriber window. Make any changes and click Save to save your changes and return to the previous screen.

Please contact Insbridge Support for any other changes.

Deleting a Database

If a database is no longer needed, it can be deleted. Make certain the database is not needed before deleting it, as this action cannot be undone.

1. From the Insbridge page, scroll down to the subscriber you need. Click the underlined database you want to delete (in Figure 13, you would click rm310).

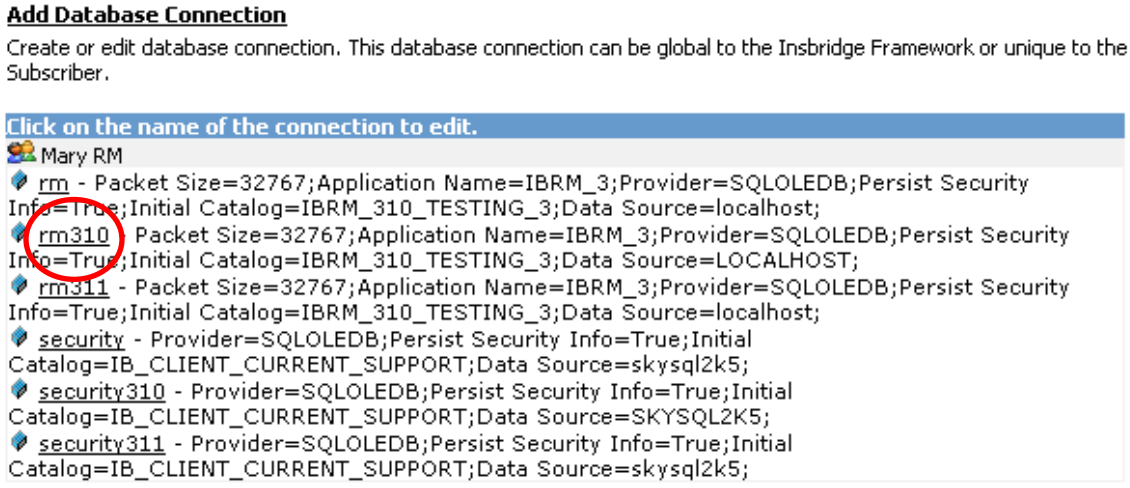


Figure 13 Database List

2. This will open the **Edit Database** window.

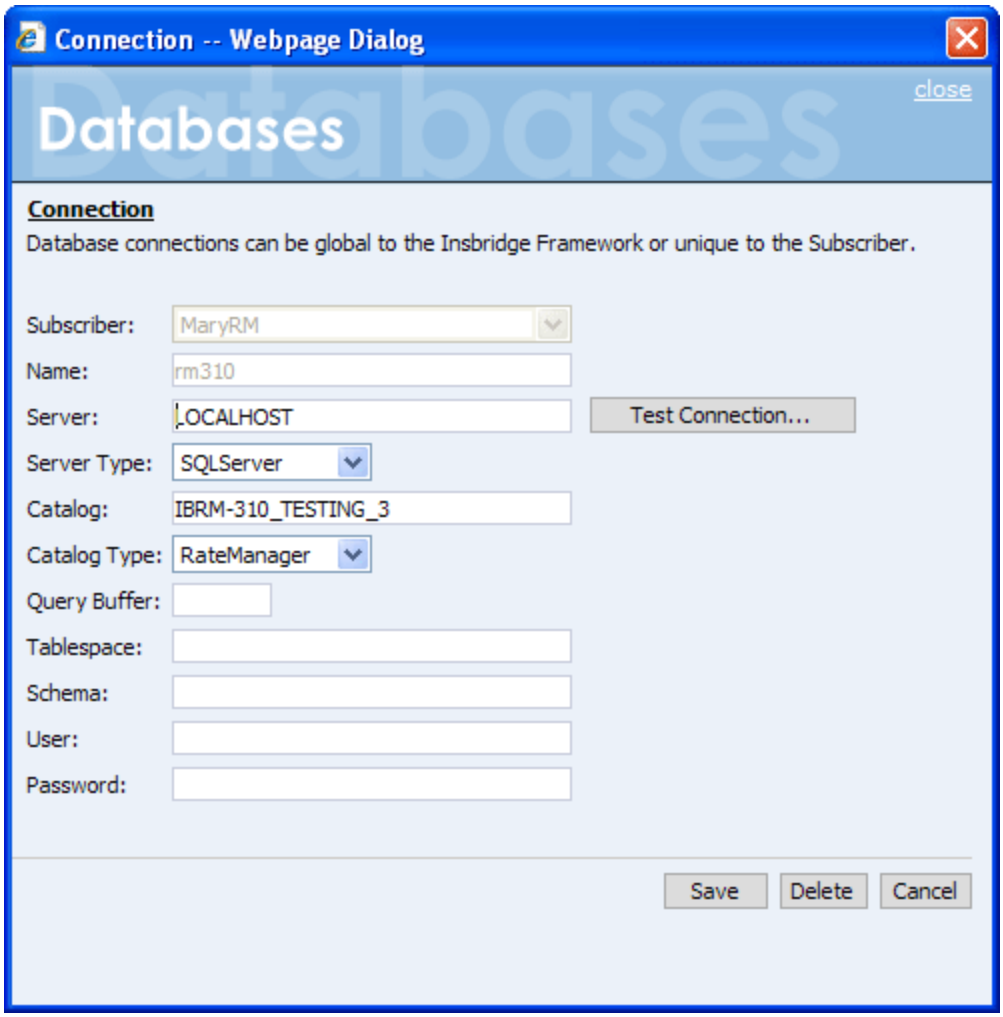


Figure 14 Edit Database Window

3. Click Delete, you will be asked to confirm deletion of the database.

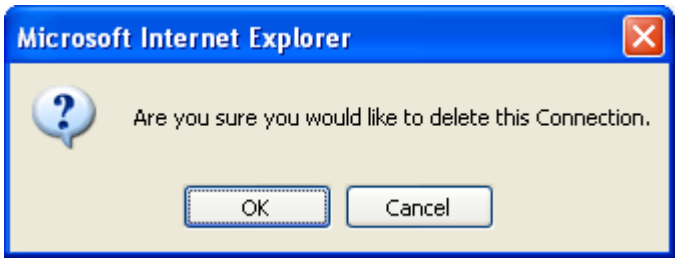


Figure 15 Confirm Deleting Database

4. Click **OK** to delete the subscriber or **Cancel** to return to the Edit Database window.

WARNING	**This action cannot be undone.**

3

Introduction to the SoftRater Page

The SoftRater page is the testing area of SoftRater. The SoftRater Test Interface provides a place for you to test input files against SoftRater Packages (SRP's) that have been loaded throughout your network or that are publicly accessible.

The SoftRater page has four areas:

- **SoftRater Test Interface**
- **Rate Operators**
- **Map Request Operators**
- **Result Information**

Navigating to the SoftRater Page

1. Using the menu tree, click **SoftRater**.

2. This will open the **SoftRater** page.

SoftRater Test Interface

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

Rating a File Using the 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. These options are divided into two categories:

- Rate Operators
- Map Request Operators

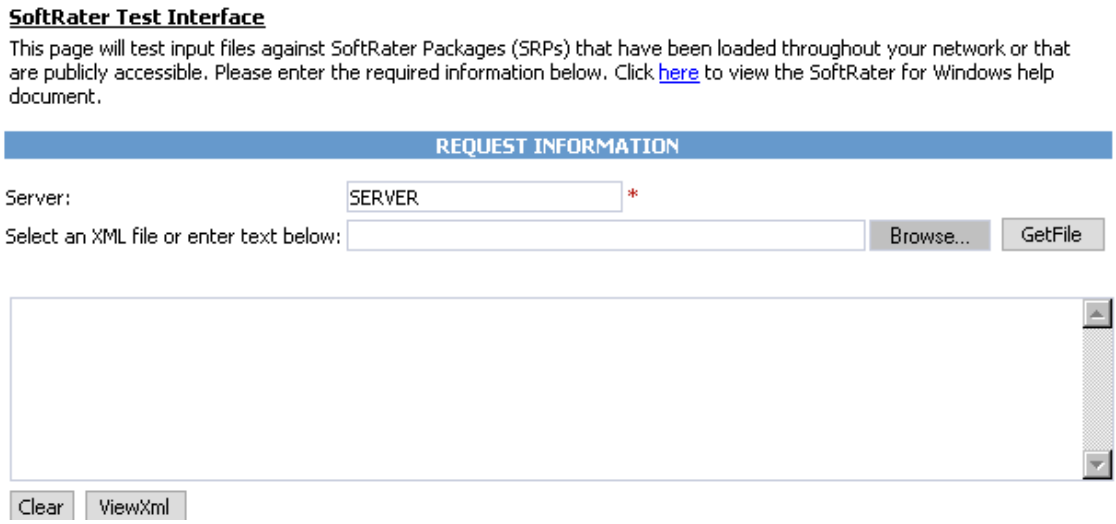


Figure 16 SoftRater Test Interface

1. On the SoftRater page, enter the name of the server you want to rate against in the **Server** text box.

2. Browse for an XML file to rate or copy and paste an XML file into the large text box. If you browse for an XML file, you can view the XML in the large text box by clicking GetFile. This allows you to edit the XML before rating.

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 will be rated and the results will be shown in the results box.

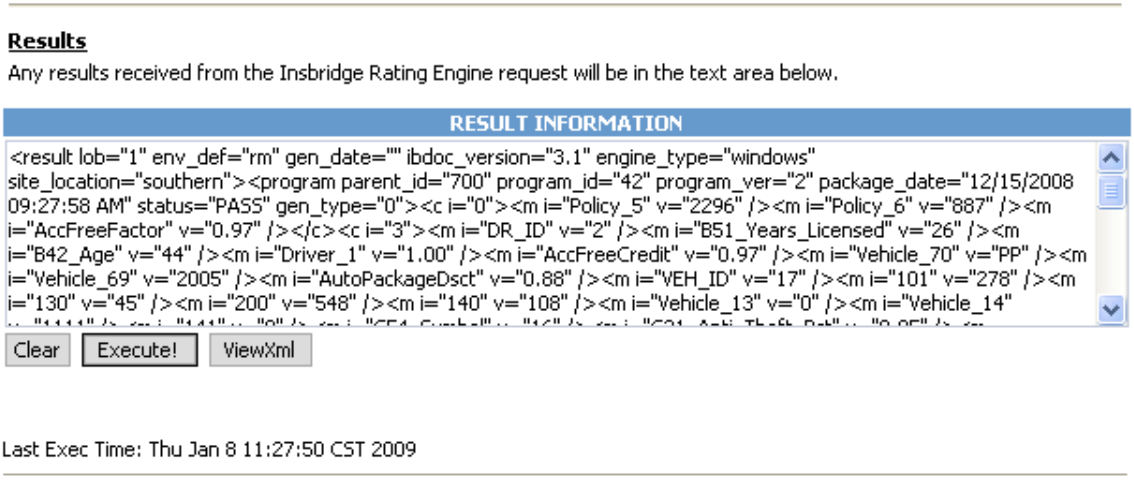


Figure 17 Test Results

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

Optional Rate Operators

Rate operators 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.

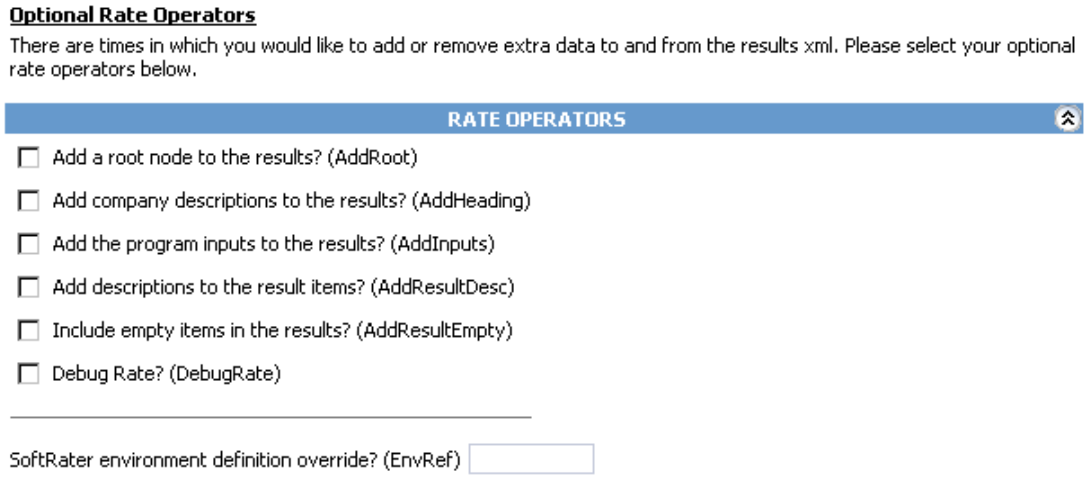


Figure 18 Optional Rate Operators

NOTE	You can use any combination of rate operators.

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 `<ibdoc>.`

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, `VehPrincipallyDriven` is the input name, and `Primary Vehicle` is the result ID:

```
<m i="Primary Vehicle" d="VehPrincipallyDriven" 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.

The following option requires you to enter specific information into the text box:

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.

Optional Map Request Operators

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

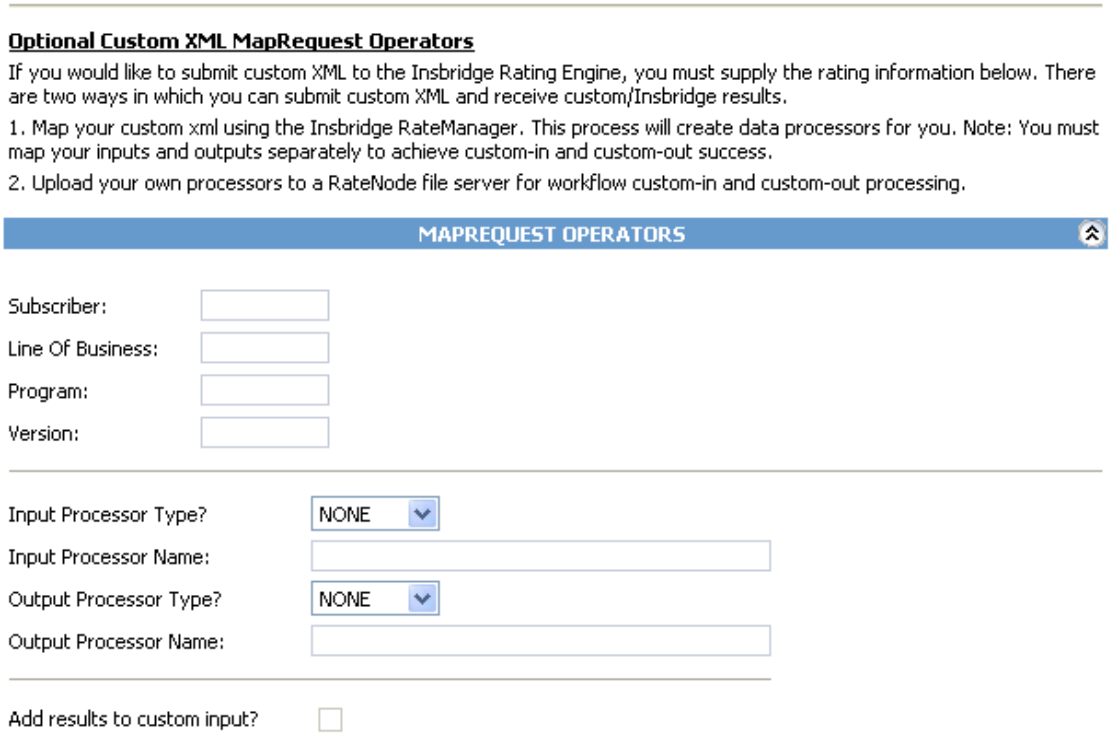


Figure 19 Custom XML Map Request Operators

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

Subscriber: Your Company's subscriber ID.

Line of Business: The number for the line of business you are rating. For example, if you are rating a file for the fire line of business, then enter 5.

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 line of business. Global mappings are created in RateManager from the **Global Inputs** screen.

LOCAL: A mapping that is specific to a particular program version. Local mappings are created in RateManager from the **Program Listing** screen.

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.

GLOBAL: A mapping that can be used by all programs under a specific line of business. Global mappings are created in RateManager from the **Global Inputs** screen.

LOCAL: A mapping that is specific to a particular program version. Local mappings are created in RateManager from the **Program Listing** screen.

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.

4

Introduction to SoftRater Engine Configuration

The SoftRater Engine configuration page allows an administrator to configure information specific to the SoftRater Engine. For additional information on caching, see the SoftRater topic Introduction to SoftRater Caching in the SoftRater User Guide.

To Navigate to the SoftRater Engine Configuration Page

1. Using the menu tree, click the plus box (⊞) next to **SoftRater** to expand it and then click **Engine**.

2. This will open the **SoftRater Engine** configuration page.

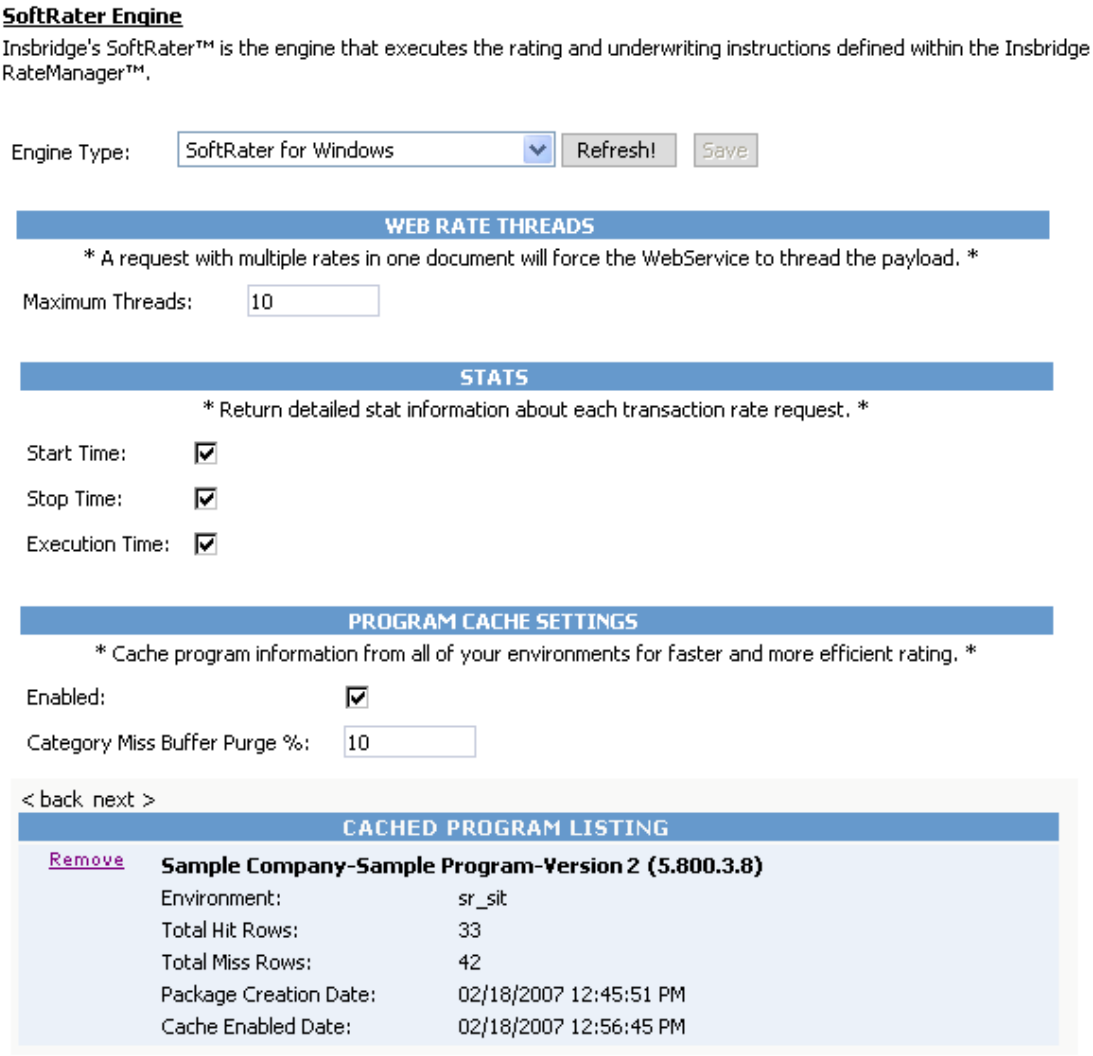


Figure 20 SoftRater Engine Configuration Page

Engine Type

Drop down listing that allows you to select which configuration information to show.

SoftRater for Windows: Shows configuration information for the SoftRater for Windows engine.

Connectors: SoftRater for Windows has the ability to call-out to external Carriers and Portals to get information.

Connectors may require Professional Services. For more on connectors, please see the section on Connectors below.

Web Rate Threads

The IBFA system administrator can enter in the number of Web Rate Threads. This feature will allow for a rating that goes through web services to specify the maximum number of threads that need to be executed. Threading can be set to any number required. Setting the maximum number of threads will ensure that ratings will be returned in sequential order.

Stats

Stats allows you to choose if statistical information will be included in the return XML. Any combination of the options may be selected. The statistical information is returned in the <stats> node.

Start Time: Timestamp of when rating started. Returned in the <start_time> node.

Stop Time: Timestamp of when rating finished. Returned in the <stop_time> node.

Execution Time: 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 execution time is shown in milliseconds (10^{-2} seconds).

Program Cache Settings

Allows you to configure the cache. After making a change, be sure to click Save. If you want to reset the options to the last saved version, click Refresh!.

Enabled: A check indicates the cache is enabled. If you uncheck the box and then click Save, the cache will be disabled and all data (hits and misses) will be purged from the cache.

Category Miss Buffer Purge %: The percentage (1-99, integers only) of misses to be removed from the cache at a time. A setting of 0 will not purge any misses. A setting of -1 will cause no misses to be stored in the cache. Misses will only be purged when the server is inactive.

Cached Program Listing

The Cached Program Listing will be 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.

Environment: The name of the environment the program was rated in.

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 topic Introduction to SoftRater Caching in the SoftRater User Guide.

Connectors

Connectors provide the ability to connect with external services. For example if you wanted to get a rate from an external carrier, you could create a connection that would take a rate request, transform the file if needed, send it to the carrier, and receive a response back. The connector can transform Insbridge XML to a custom format and vice versa. Typically users of connectors are Insurance Agencies that need the ability to do real-time rating with multiple carriers.

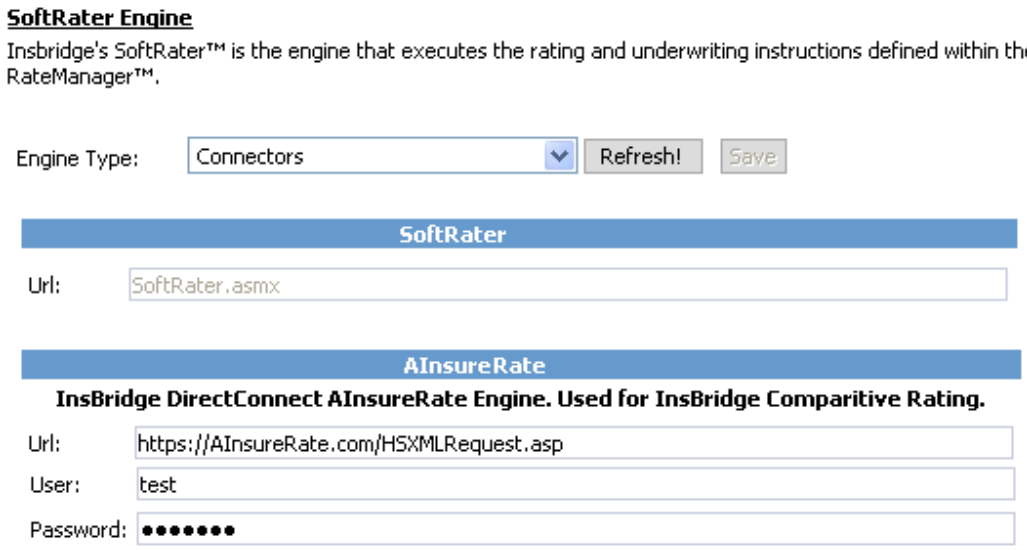


Figure 21 Connectors

Editing a Connector

If **Connectors** is selected as the Engine Type, the screen will refresh with a list of available connectors. Connectors cannot be added or deleted from this screen. For each connector a URL, user name and password can be shown. The SoftRater connector cannot be edited (read-only). Connectors will be listed in the same order they are listed in the connectors.config file, which is in the Insbridge folder on the server where Insbridge is installed.

Connector information must have at least a URL. If other information such as a user name and password is required, it may be listed. URLs, user names and passwords, or other information

can be edited here. Type in any changes in the text box and click **Save**. Any edits here will be saved to the connectors.config file.

If you have made a mistake or do not want to implement changes, click **Refresh** to return the screen to the original entry.

Adding a Connection

Adding connectors is a multi step process that may require some Professional Services. Adding a new connector requires an update to IBFA, updated connectors.config file, and transformation files if needed. In IBFA, a new connector must have a corresponding subscriber added and an environment setup as well.

Customization may be required for the connection. Please contact Oracle Insurance Support representative for more information.

5

SoftRater Explorer

Introduction to SoftRater Explorer

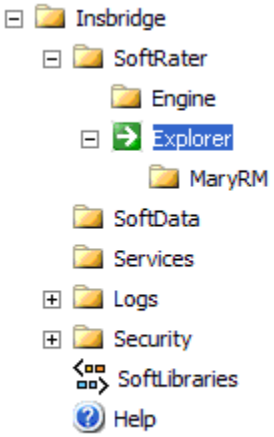
SoftRater Explorer provides a place for you to configure environments, LOB's, virtual file servers and, if applicable, carriers & portals. Once configured, SoftRater Explorer is used to download, load, unload, move and delete packages to/from your SoftRater environments. For more information about SoftRater Packages (SRP's), see Introduction to SoftRater Packages.

Explorer Configuration Page

The Explorer Configuration page is where you set up email addresses that will appear in the drop downs when you perform a package operation, i.e. load package. This page also is used to set up internet proxy settings.

Navigating to the Explorer Configuration Page

1. Using the menu tree, click the plus box (⊞) next to **SoftRater** to expand it and then click **Explorer**.



2. This will open the **Explorer Configuration Page**.

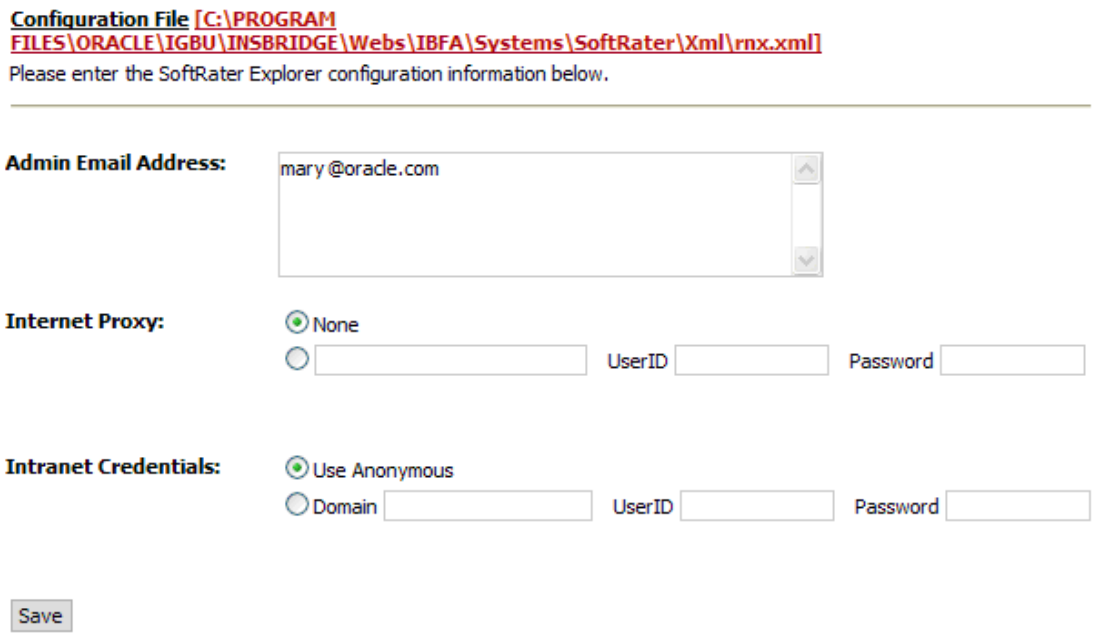


Figure 22 Explorer Configuration Page

Configuration File: This configuration file (rnx.xml) contains the information entered on the current page **(Explorer Configuration Page)**. You can view the file by clicking the underlined path to the file.

NOTE	If you have an older version of IBFA, you may have a different configuration path **D:\ProgramFiles\InsBridge\Framework\2.0.2\InsBridge.Xml**.

Admin Email Address: Email addresses entered here will appear in the drop downs for packaging operations. Separate multiple email addresses with a semicolon (;).

Internet Proxy: If you use an internet proxy, you will need to set up this information in order for packaging operations to succeed. The first text box is for the name of the proxy and the last two are for you to enter a user ID and password.

Intranet Credentials: If anonymous website to website access is denied, even within your own network, this setting will allow you to enter a windows account that the Insbridge application can impersonate. You can select to use anonymous or you can enter in a domain, user ID and password.

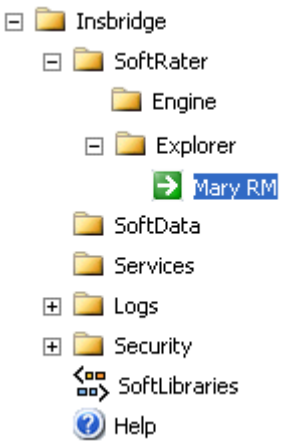
NOTE	When you are finished making changes to the email addresses, proxy settings or intranet credentials, click **Save** to update the configuration file.

Subscriber Configuration Page

Once you have added a new subscriber through the Insbridge page, you will need to set up environments and, optionally, lines of business and virtual servers for that carrier.

Navigating to the Subscriber Configuration Page

1. Using the menu tree, click the plus box (⊞) next to **SoftRater** to expand it and then again next to **Explorer**. Then click the name of the subscriber (in this case, **MaryRM**).



2. For first time users, this will open the **Configuration Page** for **MaryRM**.

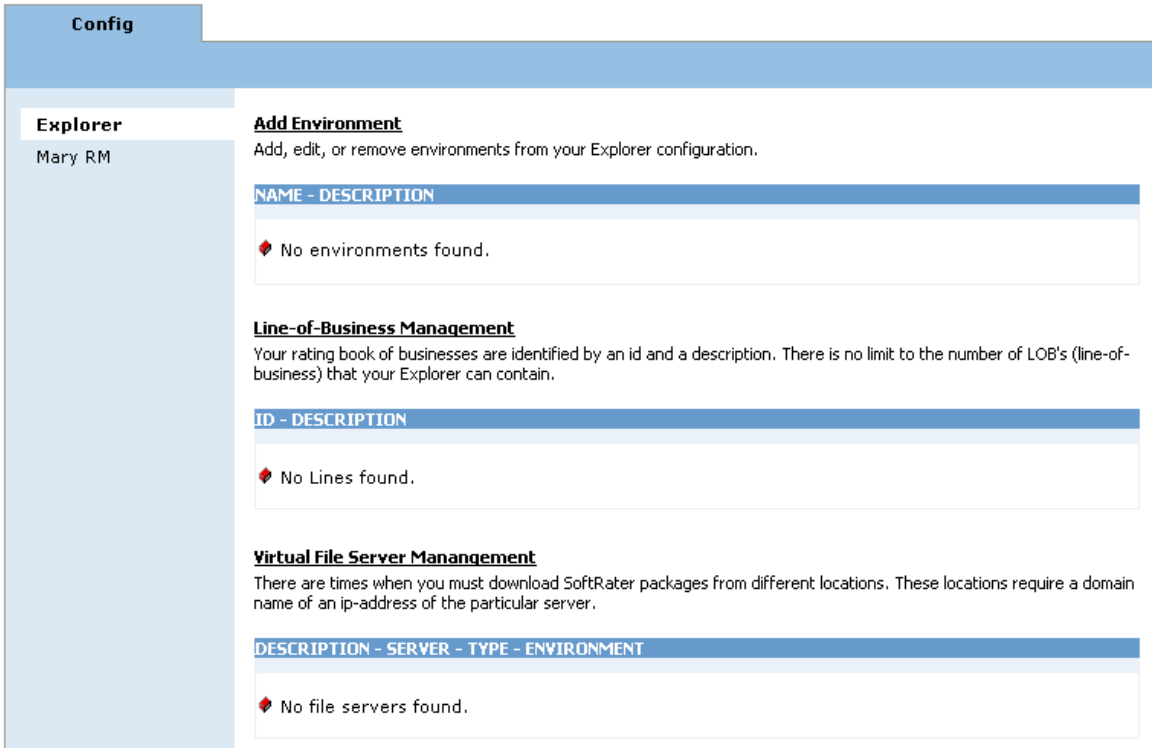


Figure 23 Carrier Configuration Page

From Carriers, you can set up the following:

- Environments
- Lines of Business
- Virtual Servers

For Portals, you will have one more option:

- Carrier and Portal Management

Carriers and portals are configured and managed in the same way. The difference between the two is the addition of carriers or other portals to any portal subscriber.

If you have not configured any SoftRater environments, the **Packages** tab will be hidden. Before you can manipulate packages, you must add and configure an environment. See Introduction to Environments for more information.

If you already have an environment setup, you will see the **Packages** tab. Click the **Config** tab to enter or edit another environment.

Introduction to Environments

An *environment* is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. Environments are local to the carrier/portal they are created under. The carriers under a portal will all use the same environment. There is no limit to the number of environments you may have. You must have at least one environment created in order to load packages to SoftRater. Environments have the following options:

- Adding an Environment
- Editing an Environment
- Deleting an Environment
- Configuring an Environment

Adding an Environment

1. To add an Environment, click the **Add Environment** hyperlink on the Configuration Page.

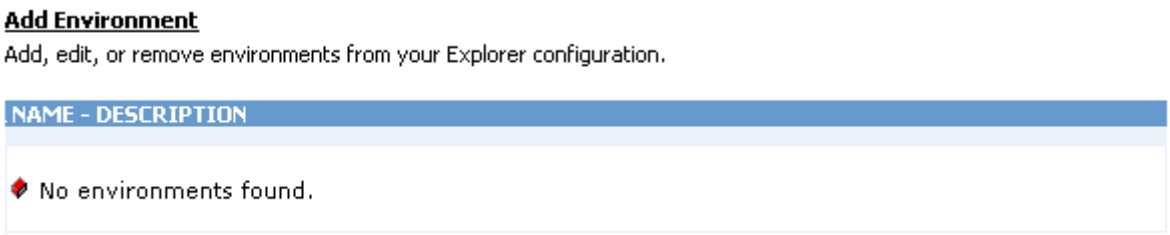


Figure 24 Environment Listing Page

2. This will open the **Add Environments** window.

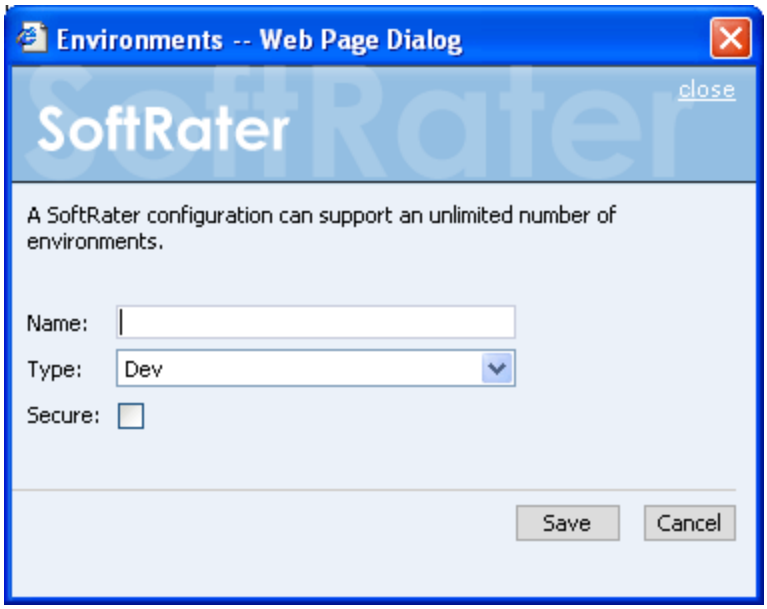


Figure 25 Adding an Environment

3. Type in a name for your environment and select one of the three predefined types:

   - Development
   - Production
   - Quality Assurance

4. If you want to make the new environment secure, check the box next to **Secure**. A secure environment will be available to users who are logged into the Framework Administrator only. For more information on this, see Introduction to Framework Administrator Security.

5. Once you have entered the information, click **Save** to update the configuration file and return to the Configuration page.

6. After adding your environments, you will need to configure them. See Configuring an Environment for more information.

NOTE	The environment types are for classification purposes only. There is no difference between the three types.

Editing an Environment

All elements of an environment can be edited at any time. Click the underlined environment name. You will be placed on the Environments text box. Make any changes and save.

Deleting an Environment

1. To delete an environment, click the environment's name in the environment listing, in this case, Test Environment.

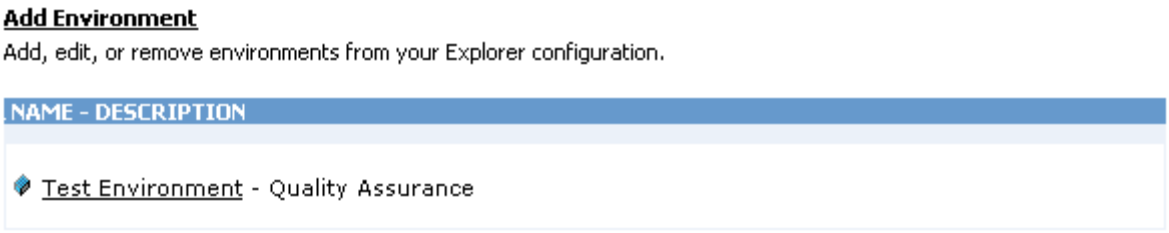


Figure 26 Environment List

2. This will open up the **Edit Environments** window.

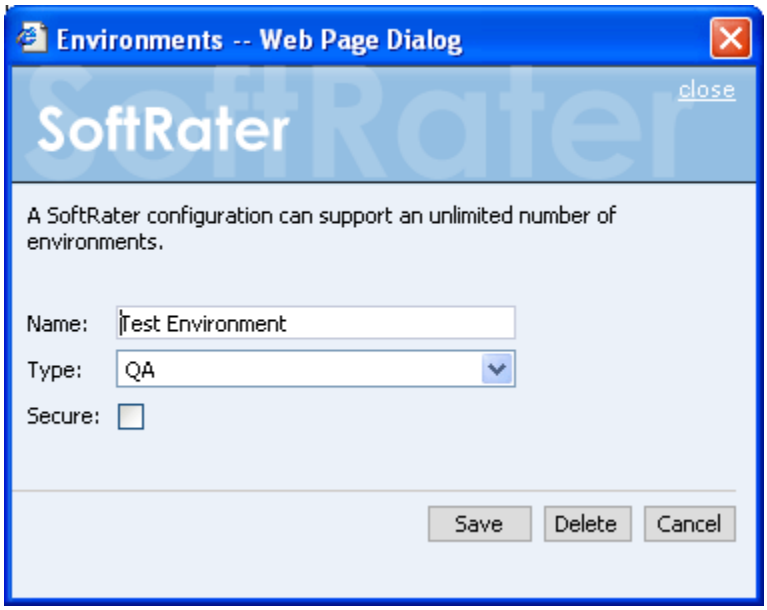


Figure 27 Edit Environment

3. Click Delete. You will be asked to confirm deletion of the environment.

Figure 28 Confirm Delete of Environment

4. Click **OK** to delete the environment or **Cancel** to return to the **Edit Environment** window.

NOTE	Deleting an environment does not delete any packages stored in that environment. It only removes the reference to the location of the packages from the Framework Administrator.

Configuring an Environment

Once you have added an environment, you will need to configure the environment so that SoftRater knows where to find, store and load packages.

1. Navigate to the configuration page for the appropriate subscriber. Select the subscriber member you need from the menu on the left hand side, in Figure 29, **Mary RM**.

   Carriers will have one member listed. Portals may have many members listed. Every member listed under a portal subscriber will use the same environments. You will not have to set up environments for every carrier or portal that is a member of a portal subscriber.

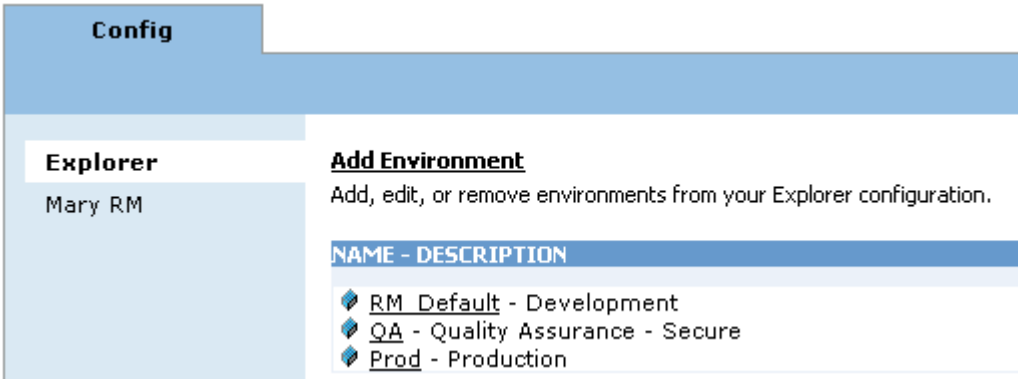


Figure 29 Configuration Page for Configuring an Environment

2. This will open up the environment configuration page. The environments you previously setup will be listed. If an environment is missing, you must return to the subscriber configuration page and add it.

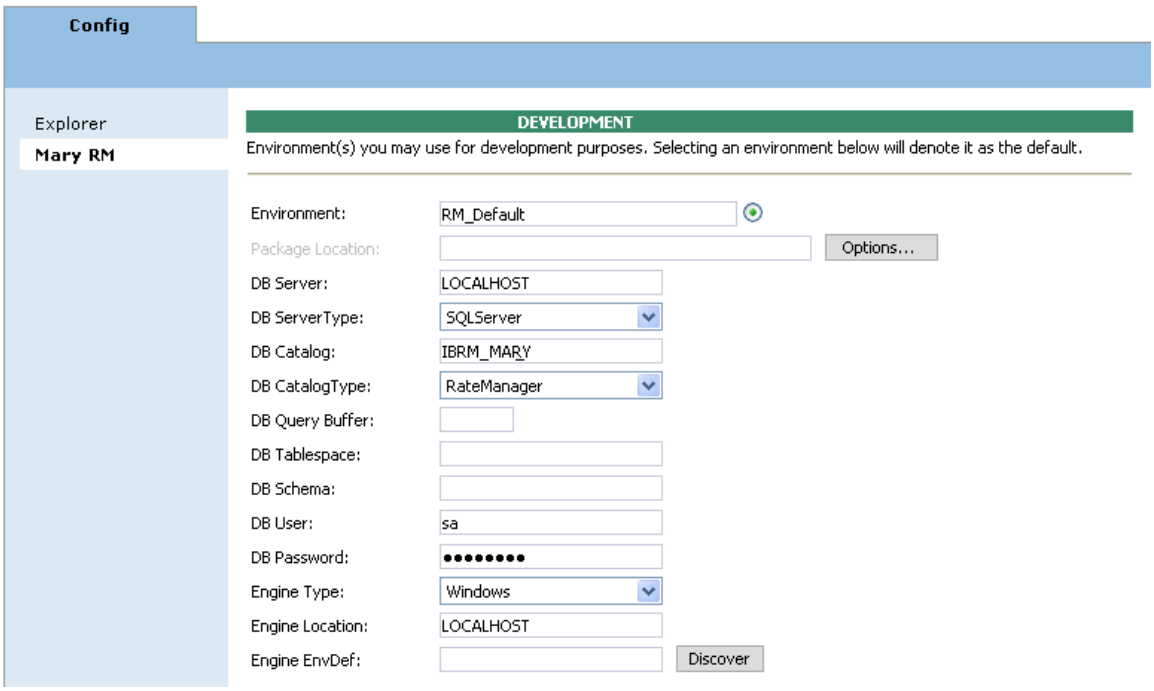


Figure 30 Configuring an Environment

Here, your environments are broken up into the three types:

- **Development**
- **Quality Assurance**
- **Production**

For each environment, you can set up the following information:

Environment: The name of the environment. Selecting the radio button next to an environment's name will set it up as the default environment.

Package Location: Physical location of where the packages should be stored. Click Options... to run a process to validate the permissions on the directory and certify any packages in the directory. In order for the Framework Administrator to successfully manipulate packages in the location, it must have full control of the directory.

DB Server: The name of the server that houses the database that packages will be loaded to. For DB2 servers, this is the DB2 Registered Alias Name. For Oracle servers, this is the ODBC DSN Name.

DB Server Type: The type of server that houses the database. Currently, RateManager and SoftRater support SQL Server, Oracle and DB2. For information on setting up Oracle and DB2 drivers, see below.

DB Catalog: The name of the catalog in the database. For DB2 servers, this is the System DSN Name. For Oracle servers, no value is needed.

DB Catalog Type: The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.

***DB Query Buffer:** 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. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.

***DB Tablespace:** For future use.

***DB Schema:** The name of the schema that defines the structure of the database.

DB User: Username to access the database.

DB Password: Password to access the database.

Engine Type: The type of Insbridge SoftRater engine that is used. The available options are: Windows, WebSphere, WebLogic or JBoss.

Engine Location: The location of the SoftRater engine. If the engine is local to the Framework Administrator (i.e. located on the same server), leave this field as LOCALHOST. If the engine is located on a different server, enter the name in the box.

Engine EnvDef: This field should remain blank, unless the engine is located on a different server. If the **Engine Location** is set to LOCALHOST, leave this field blank. If the **Engine Location** is not LOCALHOST, this should match the name of the environment on the remote server.

NOTE	* Items marked with an asterisk only need to be entered/edited if you are using an Oracle or DB2 server.

Introduction to Line of Business Management

Adding or deleting a line of business from the Framework Administrator does not add or remove that line of business from RateManager. What it does do is provide you with a way to filter the results shown on the **Packages** page.

Adding a Line of Business

1. From the Configuration Page, click the **Line-of-Business Management** hyperlink.

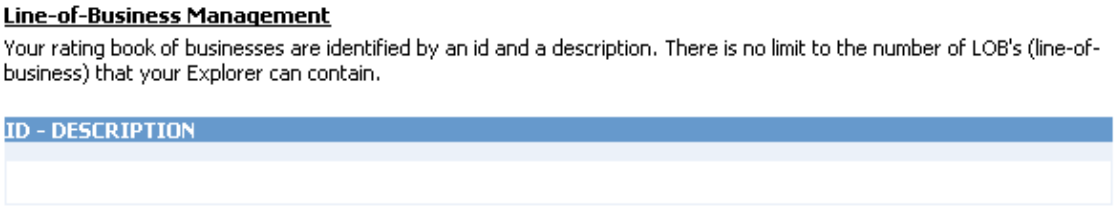


Figure 31 Line of Business Management Screen

2. This will open the **Line of Business Management** window.

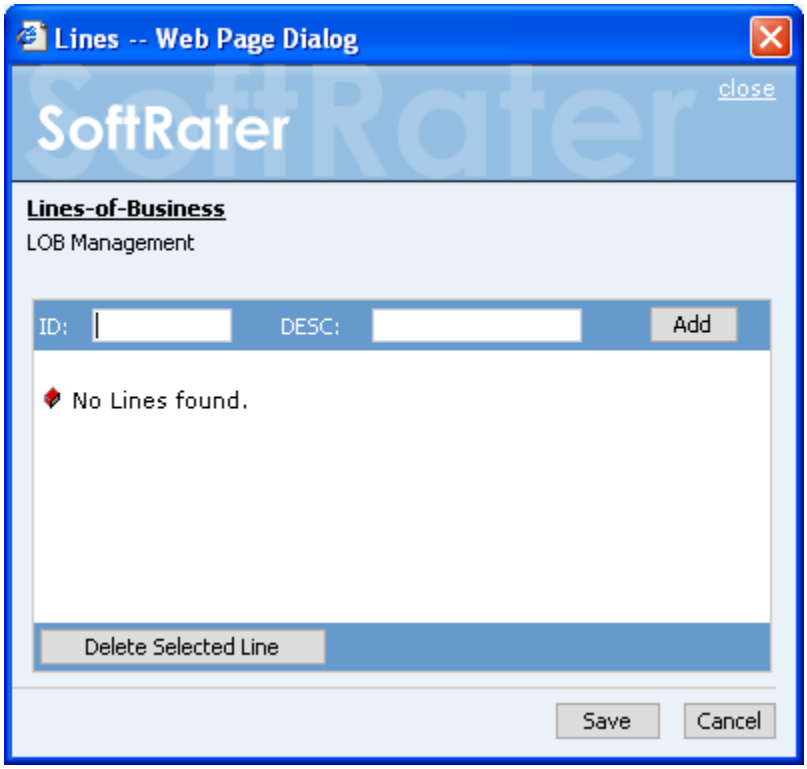


Figure 32 Adding a Line of Business

3. Type the XML ID of the line in the text box next to **ID.** The XML ID is available from RateManager by viewing the **Program Inputs XML**. The XML ID for the line of business will be on the first line, next to LOB=.

4. Type in a name for the line of business next to **Desc**. The name here does not have to match the name used in RateManager.

5. Click Add.

6. The line of business will be added to the list. Once you have finished adding LOB's, click Save.

7. The added LOB's will now appear in the search option available for the SoftRater Explorer. For additional information, see Searching for Packages.

Editing a Line of Business

Lines cannot be edited once added. If you have made a mistake, you must delete the line and re-enter. You can enter the Line of Business screen by clicking the Line of Business hyperlink or checking the box in front of any line of business. This will place you on the Lines text box where you can add or delete lines.

Deleting a Line of Business

1. To remove a line of business from the listing, click the **Line-of-Business Management** hyperlink available on the Configuration Page.

NOTE	The portal configuration page will not be displayed until you have created a portal subscriber. If the portal configuration page is not displayed, return to the Insbridge page and add a new subscriber with a type as Portal.

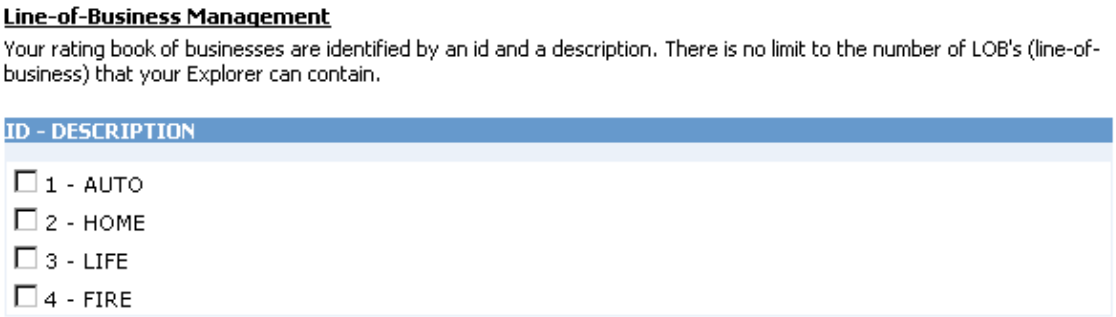


Figure 33 Line of Business Management Screen

2. This will open the **Line of Business Management** window.

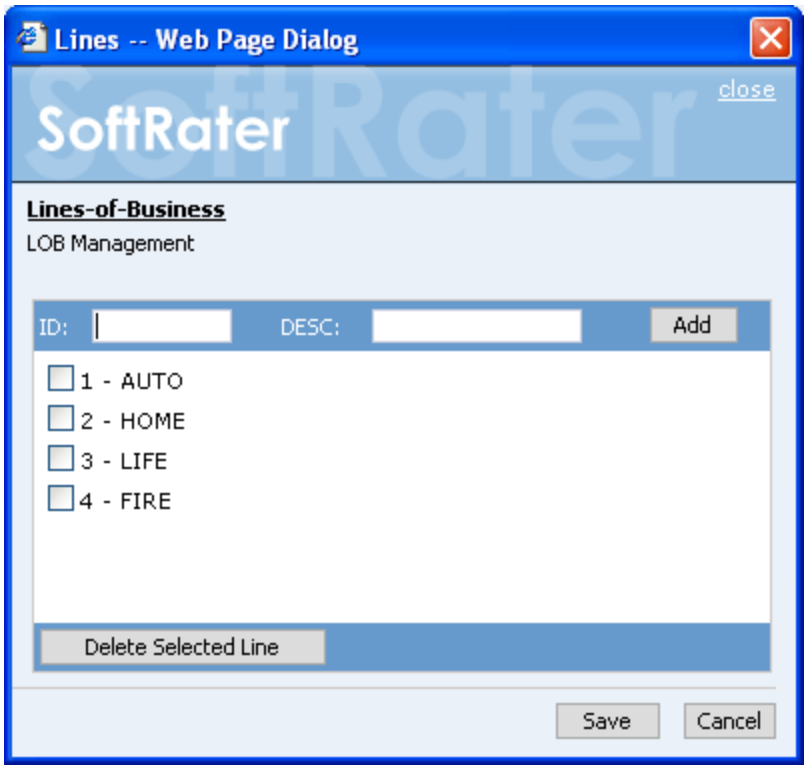


Figure 34 Selecting a Line of Business to Delete

3. Place a checkmark next to all LOB's you would like to delete.
4. Click Delete Selected Line.
5. The line(s) of business will be deleted from the list. Once you have finished deleting LOB's, click **Save**.

Virtual File Server Management

Virtual file server management allows you to set up servers that are in different locations where packages can be downloaded.

Adding a New Virtual File Server

1. From the Configuration Page, click the **Virtual File Server Management** link.

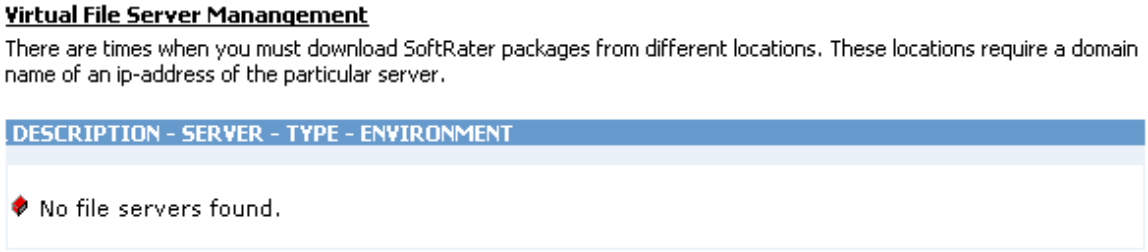


Figure 35 Virtual File Server Management Screen

2. This will open the **Virtual File Server Management** window.

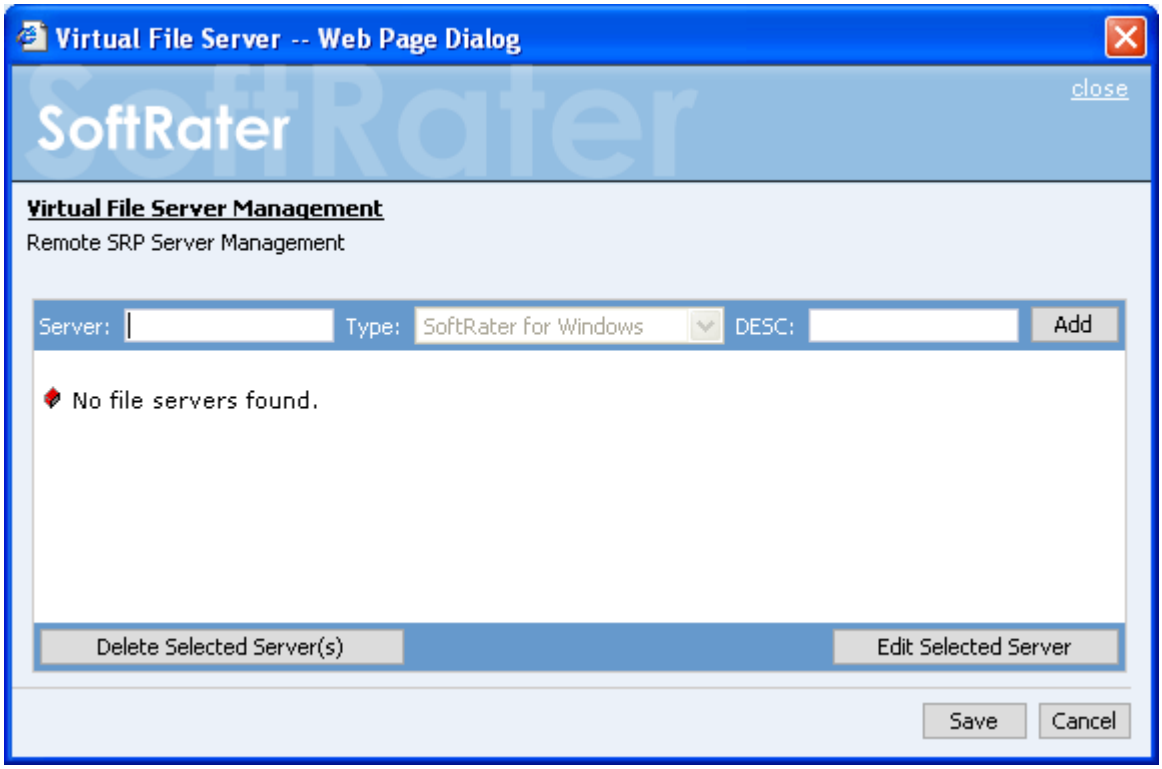


Figure 36 Virtual File Server Management Window

3. Enter the name of the server and a description. Take care when entering the server name. This field cannot be edited. If you have made a mistake, you must delete and re-enter.

4. Click Add to add the server to the list. Enter in as many servers as you need.

5. When you are finished, click **Save** to save your work and return to the previous screen.

Editing a Virtual File Server

Virtual File Servers can have the description and environment changed as needed. The server name and type cannot be edited. If you have made a mistake with the server name, you must delete and re-enter. The server type is set on the SoftRater Engine page.

1. From the Configuration Page, click the **Virtual File Server Management** link.

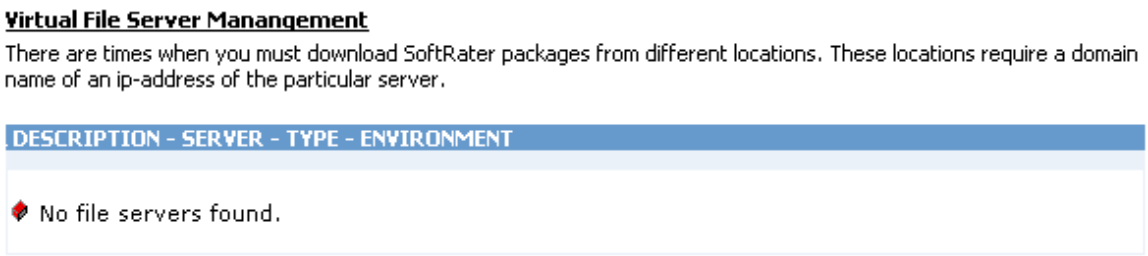


Figure 37 Virtual File Server Management Screen

2. This will open the **Virtual File Server Management** window.

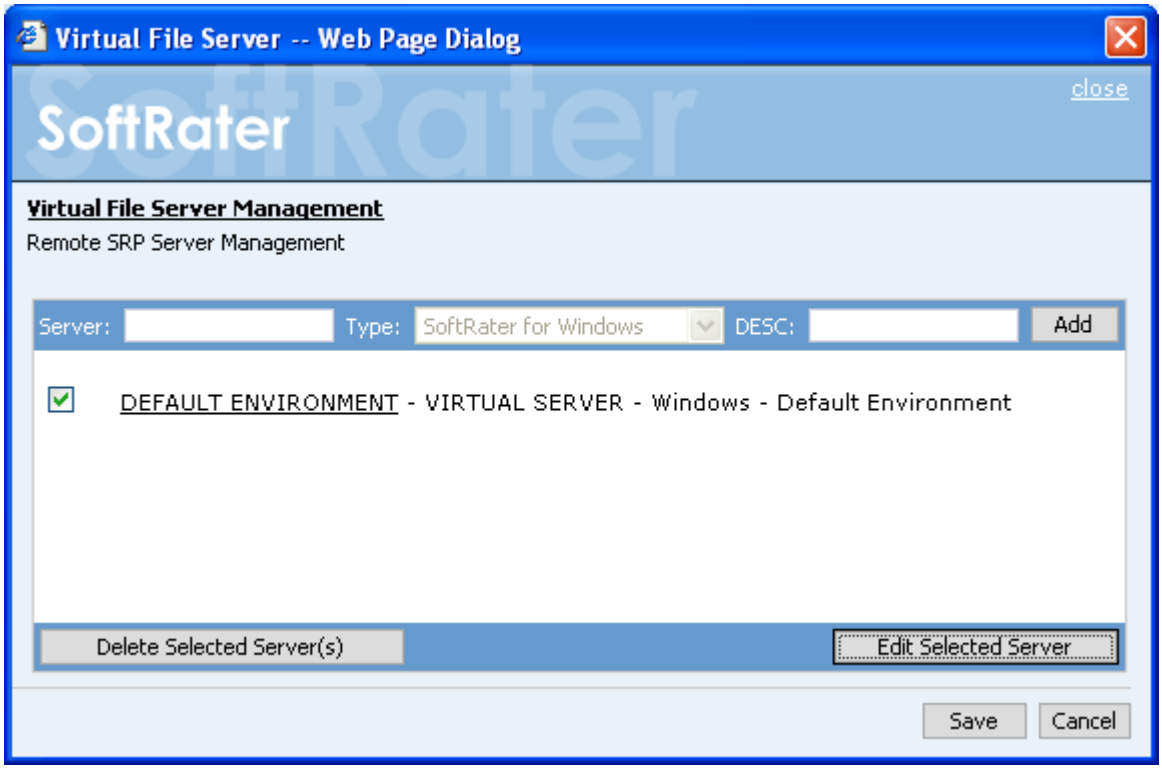


Figure 38 Editing Virtual File Server Management

3. If multiple environments are available from the server, click the virtual file server's underlined description (in this case, **DEFAULT ENVIRONMENT**). You can also place a checkmark next to the server and click Edit Selected Server.

4. This will open the **Edit Virtual File Server** window. Clicking a virtual file server's underlined description in the listing of virtual file servers on the configuration page will also open this window.

NOTE	IBFA will attempt to connect to the environment when you edit. If the remote name cannot be resolved or is unable to connect, an error message will be displayed.

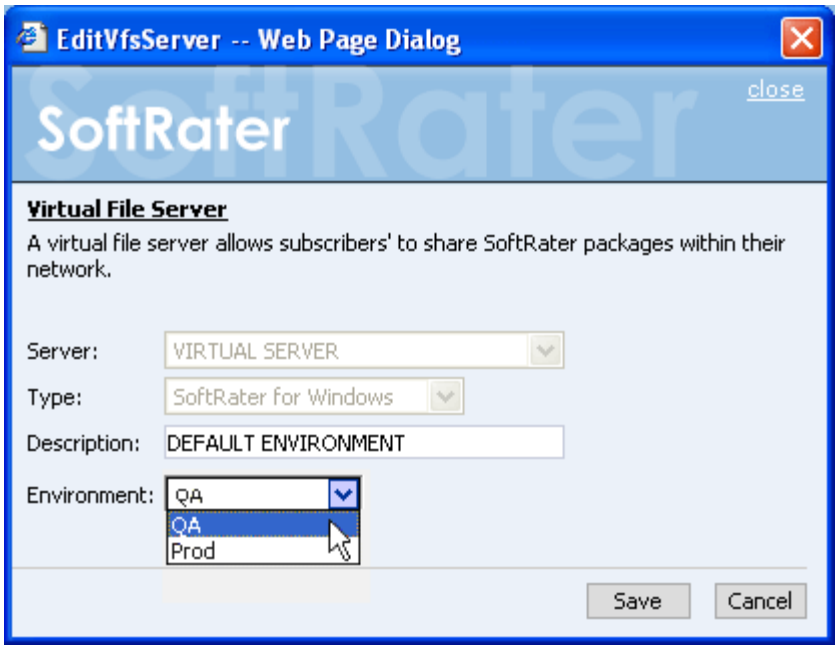


Figure 39 Editing Virtual File Server Management

6. Select the appropriate environment from the drop down. You can also edit the description from this page. Click **Save** when you are finished to return to the **Virtual File Server Management** window.

7. When you are finished adding servers, click **Save**.

8. The configuration page will refresh to show the added servers.

Deleting a Virtual File Server

There are two ways to delete a virtual file server:

The first way is from the **Virtual File Server Management** window. Use this method when you want to delete a server with an obvious error, for example a typo in the server name. This method will not try to discover the environment. No warning message will be displayed

1. From the Configuration Page, click the **Virtual File Server Management** link.

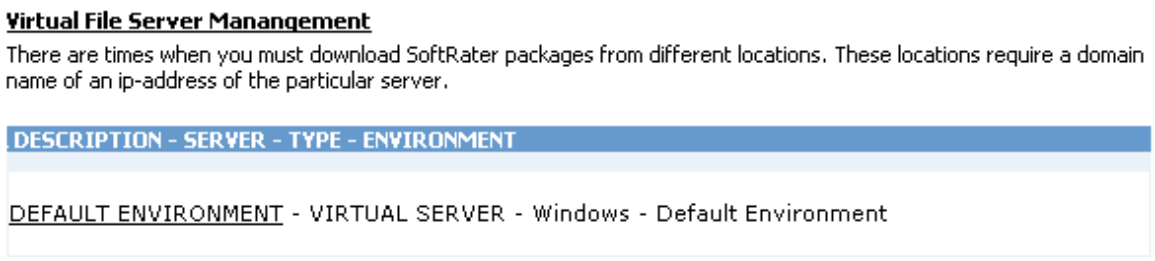


Figure 40 Virtual File Server Management Screen

2. This will open the **Virtual File Server Management** window.

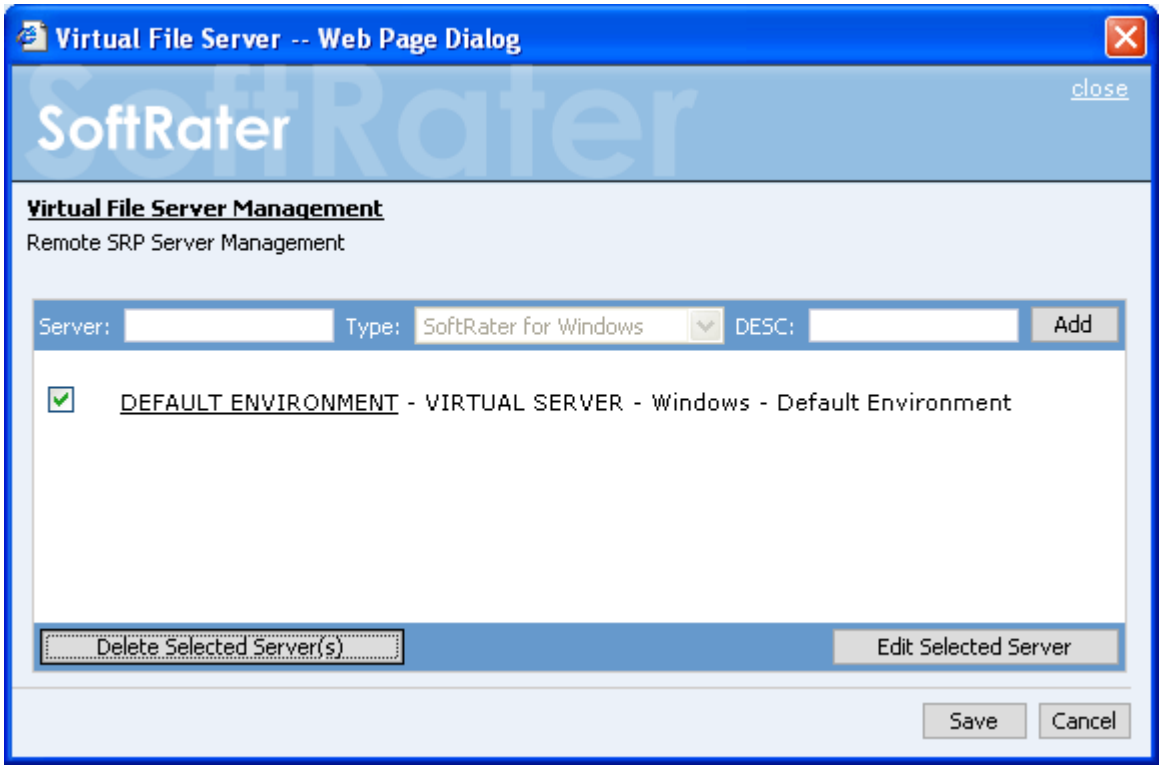


Figure 41 Deleting a Virtual File Server Management

3. Place a checkmark next to the server(s) you would like to delete and click Delete Selected Server(s).

4. The server will be removed from the list.

5. When you are finished deleting servers, click **Save**. The configuration page will refresh and the deleted servers will no be displayed.

Deleting a Virtual File Server

The second way to delete a virtual file server is from the **EditVfsServer** popup.

1. From the Configuration Page, click the underlined server name. In the example below, **DEFAULT ENVIRONMENT**.

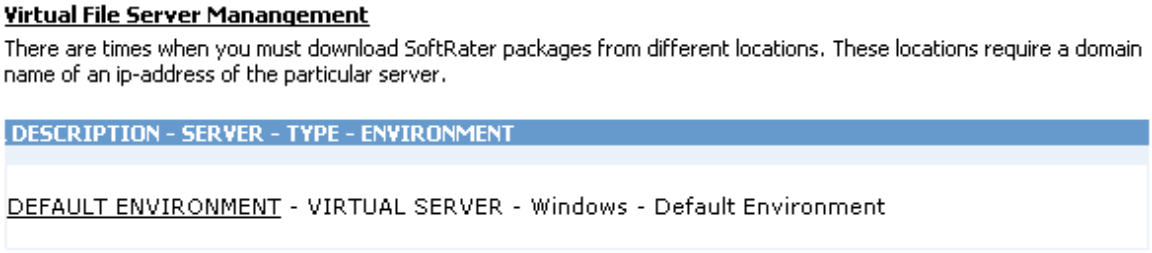


Figure 42 Deleting Virtual File Server

2. This will open the **EditVfsServer** window.

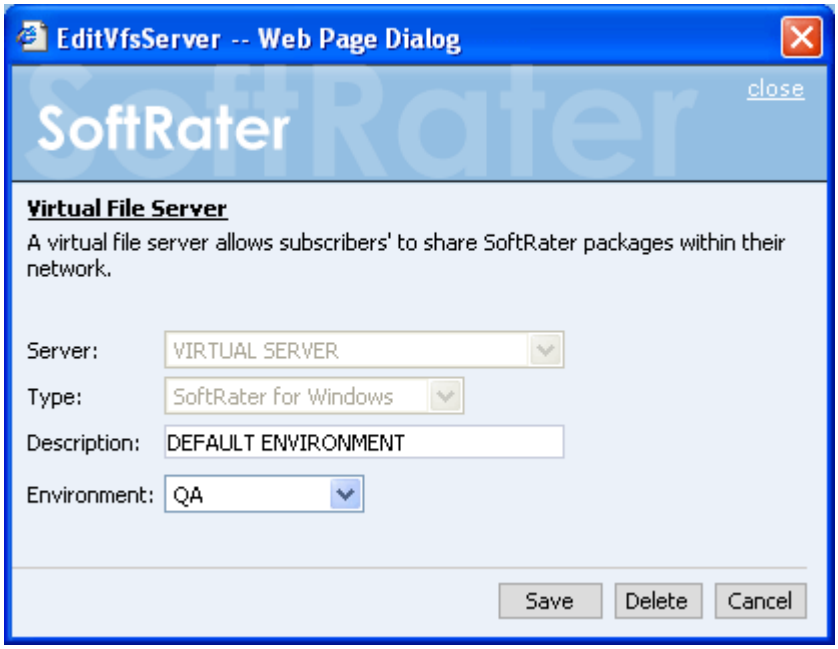


Figure 43 Deleting Virtual Server on Popup

3. Click **Delete**.
4. You will be asked to confirm deleting the server.

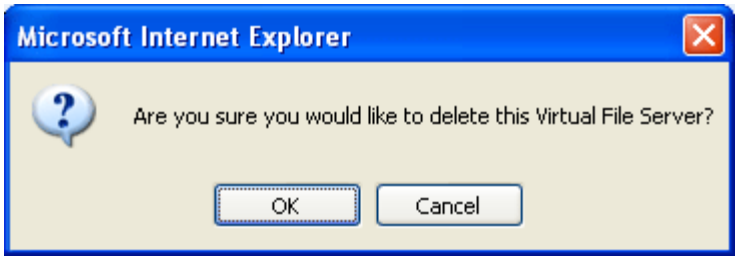


Figure 44 Confirming Deleting of a Virtual File Server Management

5. Click **OK** to delete the selected servers.
6. The configuration page will refresh and the deleted servers will no longer show.

Carriers & Portal Management

If a subscriber is a portal, you can add carriers and/or portals to it. This enables you to manage those carriers/portals from one location. Portals are generally used for SoftRater package management only by general agencies that do not use RateManager. This option will not be displayed if you have set up the subscriber as a carrier type.

Adding a Carrier / Portal

1. From the Portal Configuration Page, click the **Carrier & Portal Management** hyperlink.

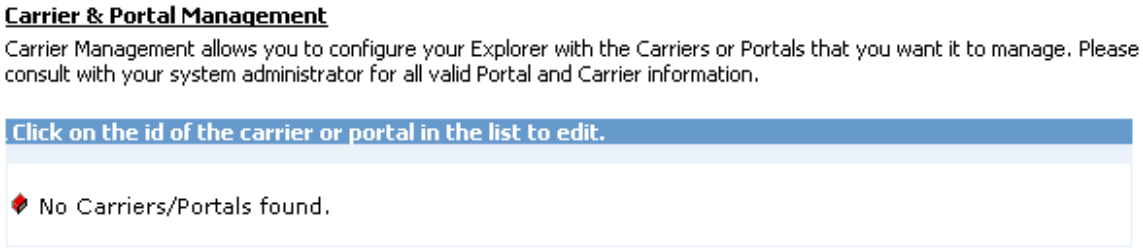


Figure 45 Carrier & Portal Management Screen

2. This will open the **Add Carrier/Portal** window.

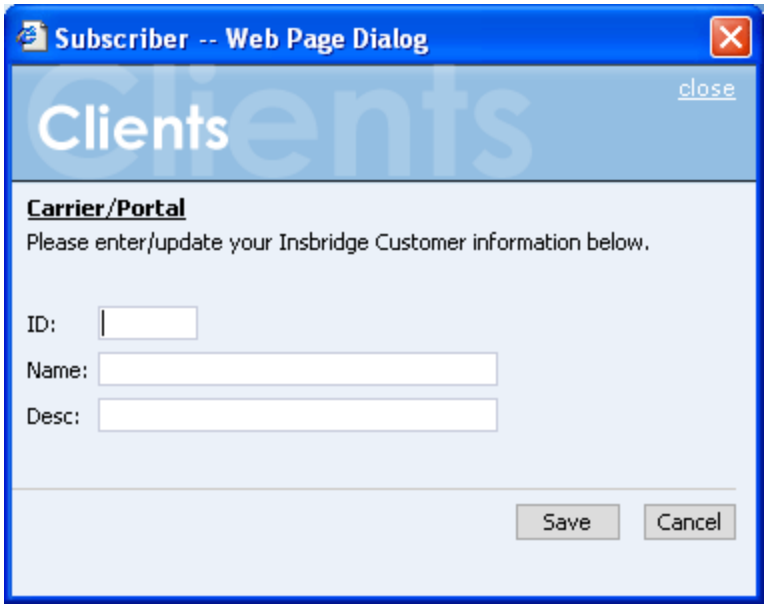


Figure 46 Adding a Carrier / Portal

3. Enter the ID, name and a description for the new carrier/portal. When you are finished, click **Save**.
4. The carrier/portal will be added to the list. You can now add and configure environments for that carrier/portal.

Deleting a Carrier / Portal

1. To remove a carrier/portal from the listing, click the ID number in the list, in this case **1005**.

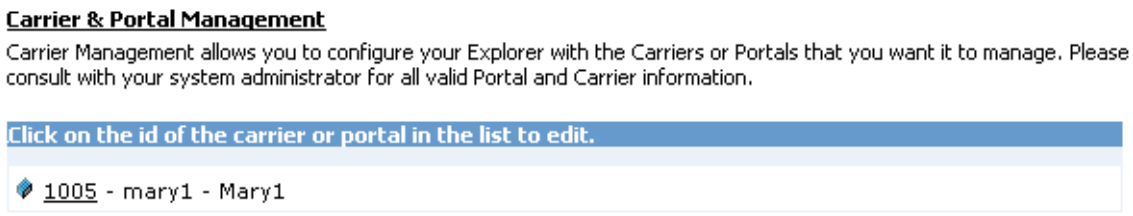


Figure 47 Carrier / Portal Management Page

2. This will open the **Edit Carrier/Portal** window.

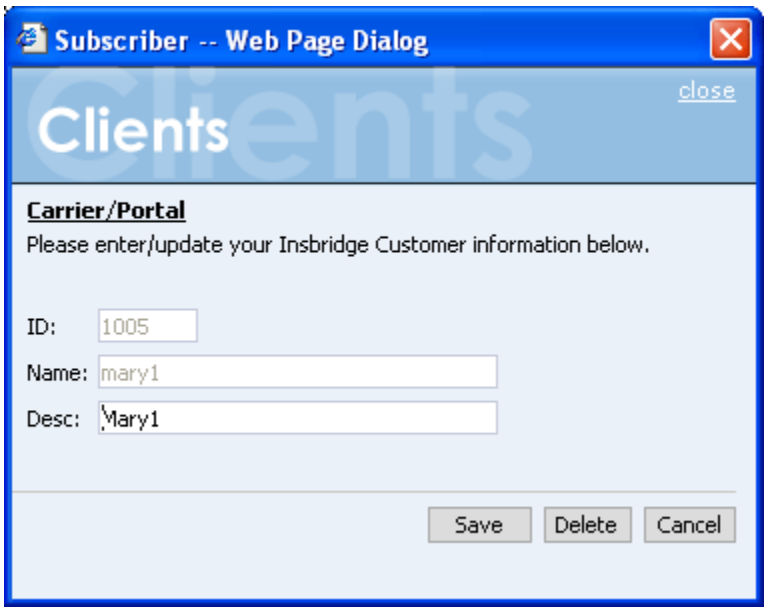


Figure 48 Editing a Carrier / Portal

3. Select Delete. You will be asked to confirm deletion of the carrier/portal.

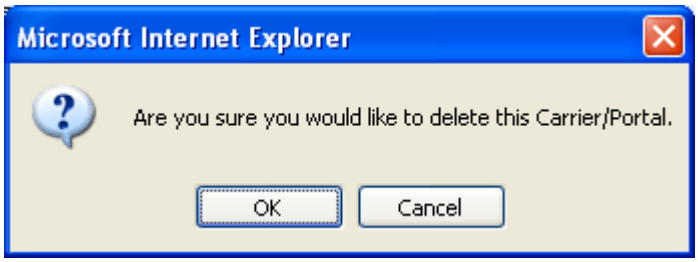


Figure 49 Confirming Deleting a Carrier / Portal

4. Click **OK** to delete the carrier/portal or **Cancel** to return to the **Edit Carrier/Portal** window.

6

Introduction to SoftRater Packages

A package is a small file that holds all the RateManager logic for a specific program and version. Packages are created in RateManager using the Create Package button.

There are two types of packages. The first is called a *local package*. The local SoftRater package (SRP) exists in the development environment and can be rated against using ScenarioManager. When a local package is created in RateManager, it is automatically loaded to the local SoftRater.

The second type is a full package. Full packages are created the same way as local packages, except that a SoftRater environment is specified when the package is created. The environment specified while creating the package is where the package will initially be stored. The package can then be loaded or moved to a different environment using the SoftRater Explorer. For information on creating packages, see the RateManager topic Introduction to Packaging.

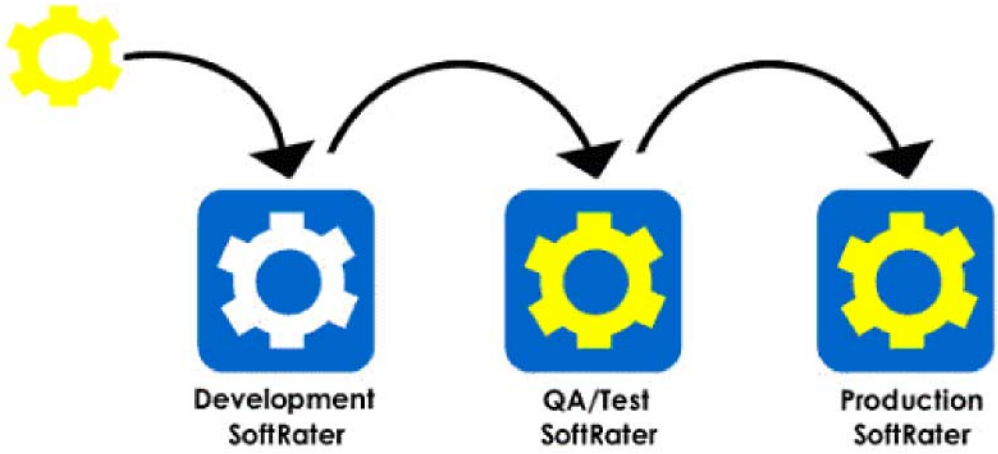
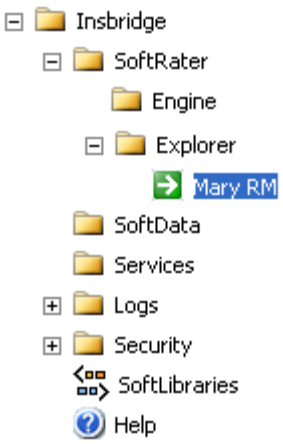


Figure 50 SoftRater Packages

SoftRater Packages Page

Navigating to SoftRater Explorer

1. Using the menu tree, click the plus box (⊞) next to **SoftRater** to expand it and then again next to **Explorer**. Then click the name of the subscriber (in this case, **Mary RM**).



2. The Explorer will automatically load the list of packages for the default environment. You can use the drop down to select a different environment and click Get Listing! to update the list of packages.

   If you have not configured any SoftRater environments, the **Packages** tab will be hidden. Before you can manipulate packages, you must add and configure an environment. See Introduction to Environments for more information.

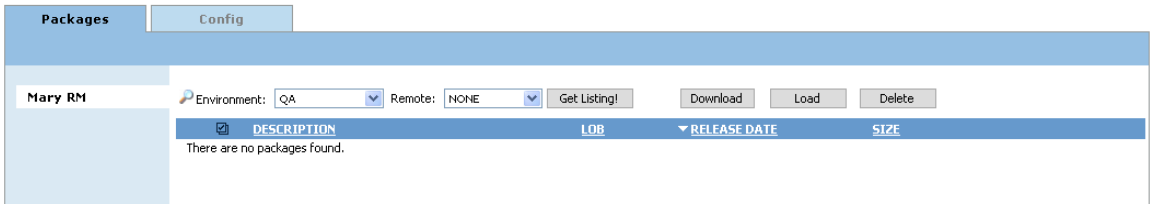


Figure 51 SoftRater Explorer

From here, you have many options. You can:

- Load Packages
- Move Packages
- Download Packages
- Unload Packages
- Copy Packages
- Delete Packages
- Search for Packages
- Compare Packages
- View Package Details
- Navigate to the Configuration Page

Loading Packages

Loading a package takes the logic stored in the package and places it in the database, so that it can be rated against. Packages can be loaded from any SoftRater environment.

To Load a Package

1. Navigate to the **SoftRater Explorer** for the appropriate subscriber.

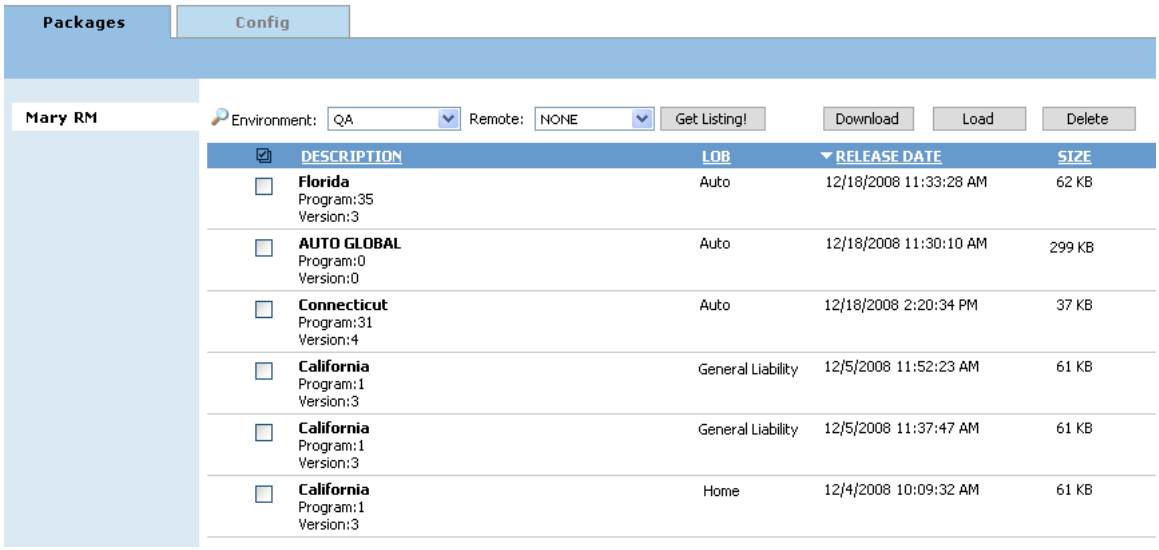


Figure 52 SoftRater Explorer Screen

2. The Explorer will automatically load the list of packages for the default environment. You can use the drop down to select a different environment and click **Get Listing!** to update the list of packages.

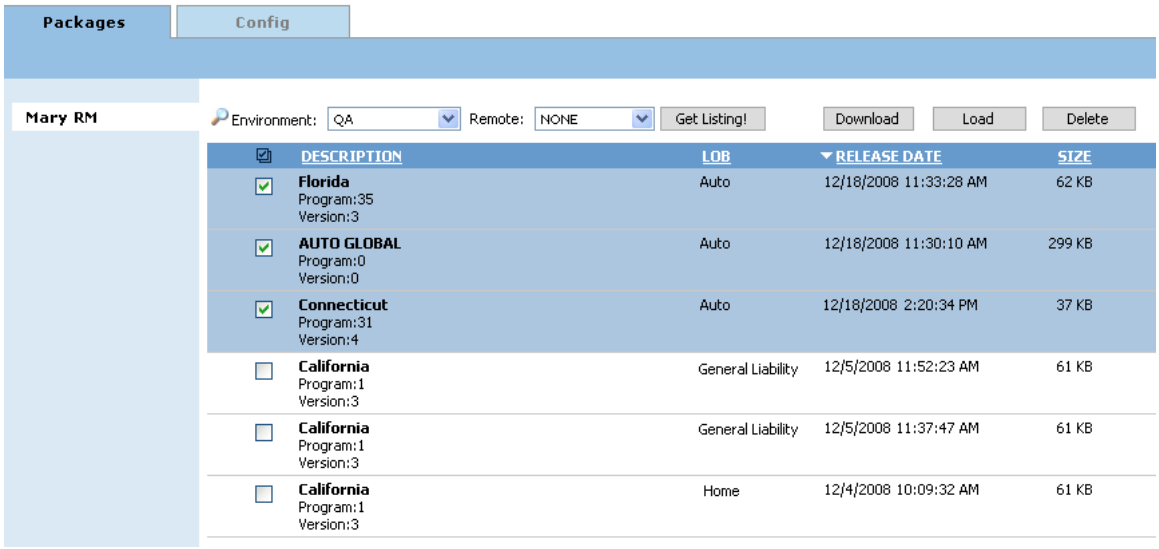


Figure 53 Selecting Packages

3. Select the package(s) you would like to load and click Load.

4. This will open the **Load Packages** window where you can select options for loading the package(s).

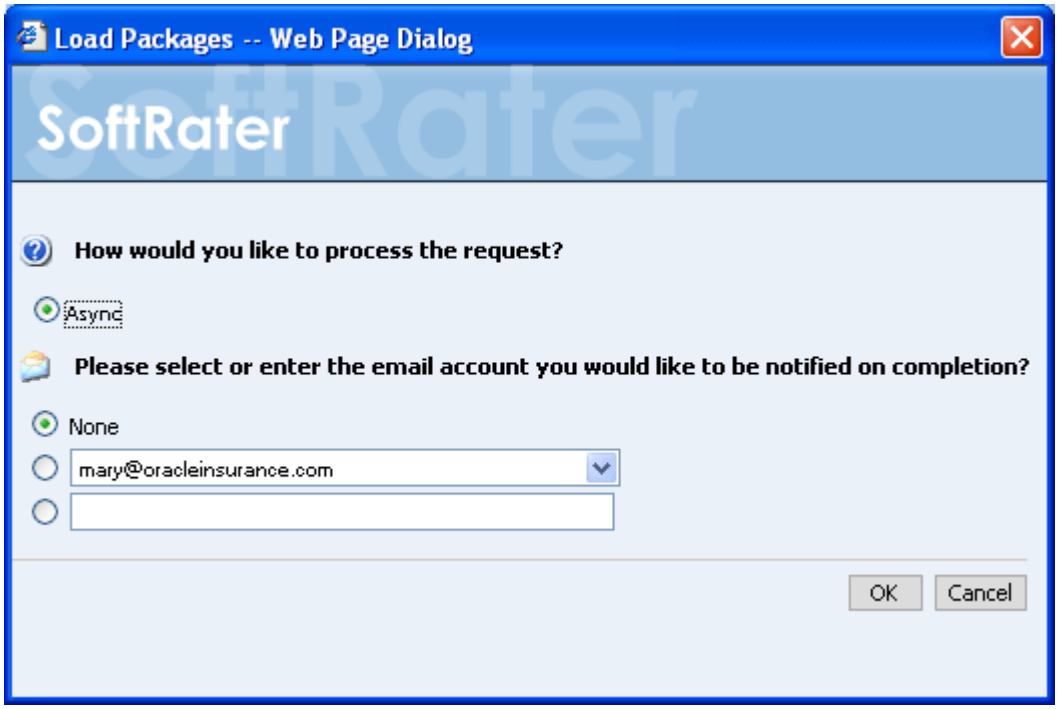


Figure 54 Loading a Package

Load Options

Sync:
This will load the package while you wait. This option is only available if you are loading one package.

Async:
This will load the packages in the background and, optionally, notify you at the email address you enter when loading is complete. This is the only option available when loading multiple packages.

Email address:
If you want to be notified when the load operation is finished, either select or enter your email address. If you would like to add your email address to the drop down list, see the Explorer Configuration Page.

5. When you have finished choosing your options, click **OK**.

   - If you chose the Sync load option, the package listing should refresh and an icon ( ) will appear next to the loaded package.
   - If you chose the Async load option, you should receive a message that the request was successful.

When the process finishes, if you elected to receive an email, you should receive an email with the results. If you elected not to receive an email, nothing will be sent to you. Refresh the listing and an icon ( ) will appear next to the loaded packages.

If you receive error messages, check your configuration settings and try again.

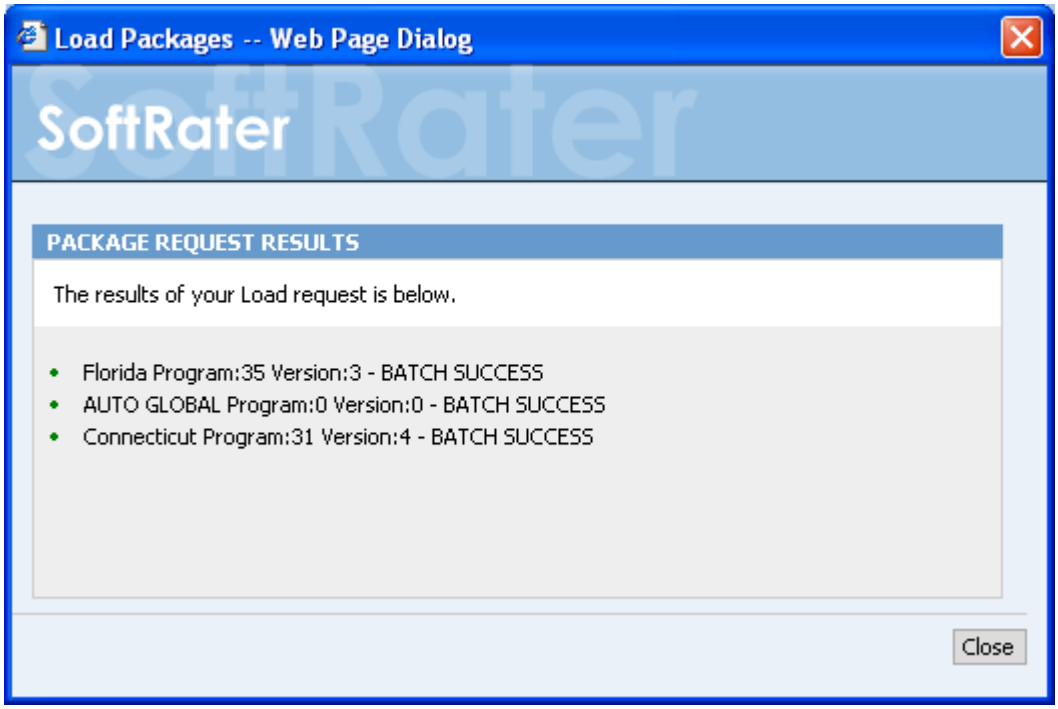


Figure 55 Load Packages Results Page

NOTE	If you load a package for a program that already has a package loaded, the original package will be unloaded and the new package will be loaded in its place. The old package will remain on disk until deleted and can be reloaded at any time.

Moving Packages

Moving a package works the same as moving a file on your hard drive. The package will be removed from the current environment and moved to the selected environment.

To Move a Package

1. Navigate to the **SoftRater Explorer** for the appropriate subscriber.
2. The Explorer will automatically load the list of packages for the default environment. You can use the drop down to select a different environment and click Get Listing! to update the list of packages.

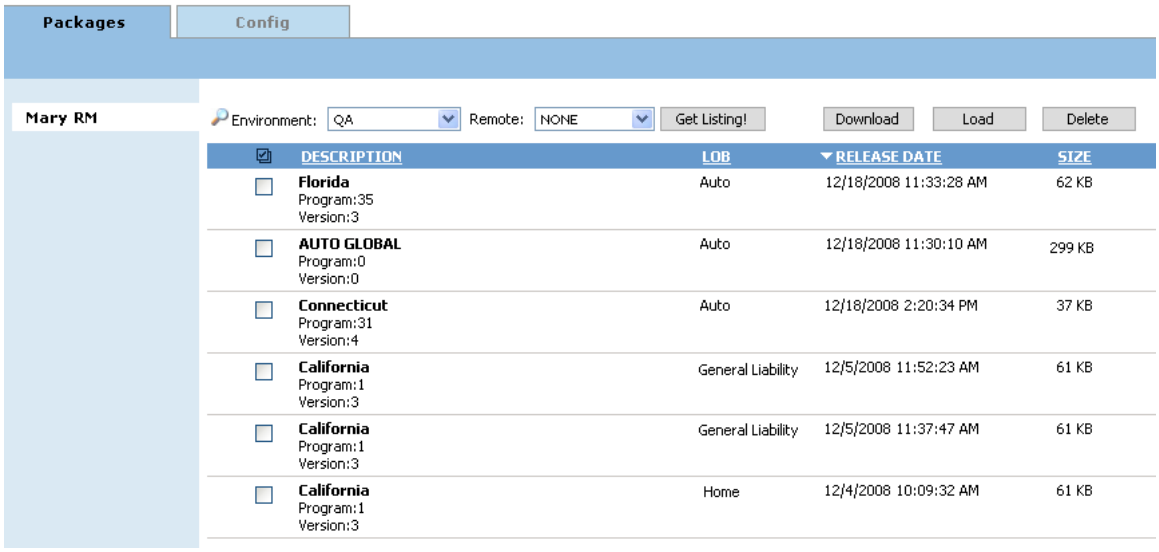


Figure 56 SoftRater Explorer Screen

3. Select the package(s) you would like to move.

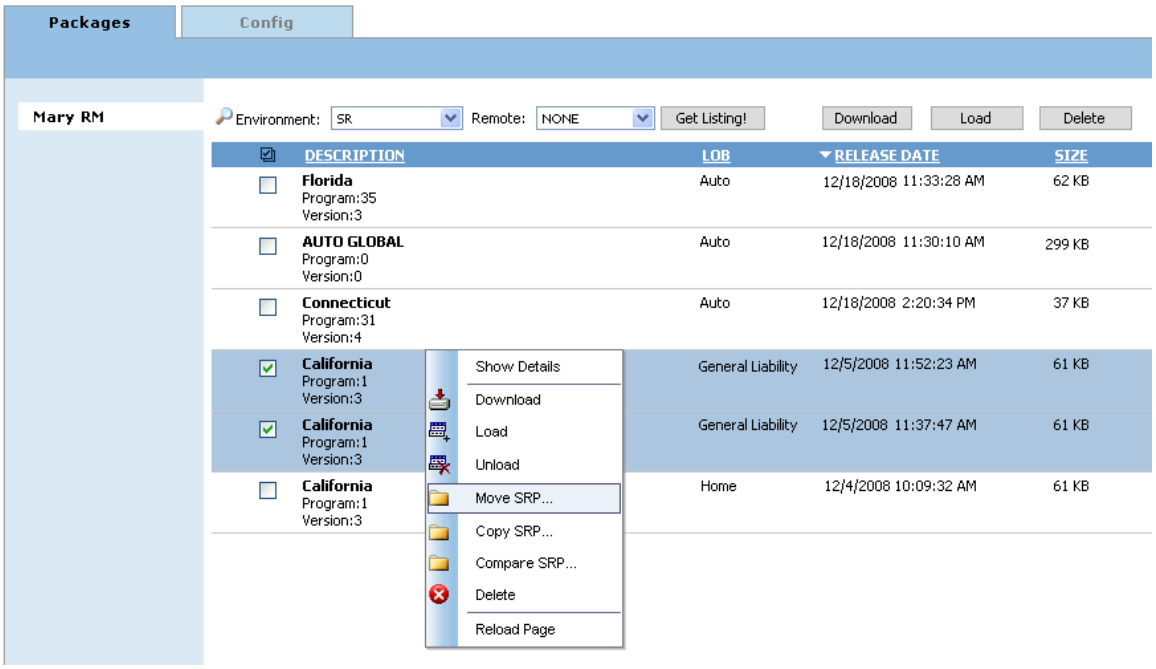


Figure 57 Selecting Packages to Move

4. Right click one of the selected packages and choose **Move SRP…** from the popup menu.

Figure 58 Moving SoftRater Packages

5. Select the environment you would like to move the package(s) to and click **OK**. The package(s) will be moved and the package listing will be updated.

Downloading Packages

Downloading a package copies the package from a remote server to your local server. Only packages that are not on your local server can be downloaded. The remote server that you want to download from must be set up as a virtual machine before you can download.

To Download a Package

1. Navigate to **SoftRater Explorer** for the appropriate subscriber.
2. The Explorer will automatically load the list of packages for the default environment.

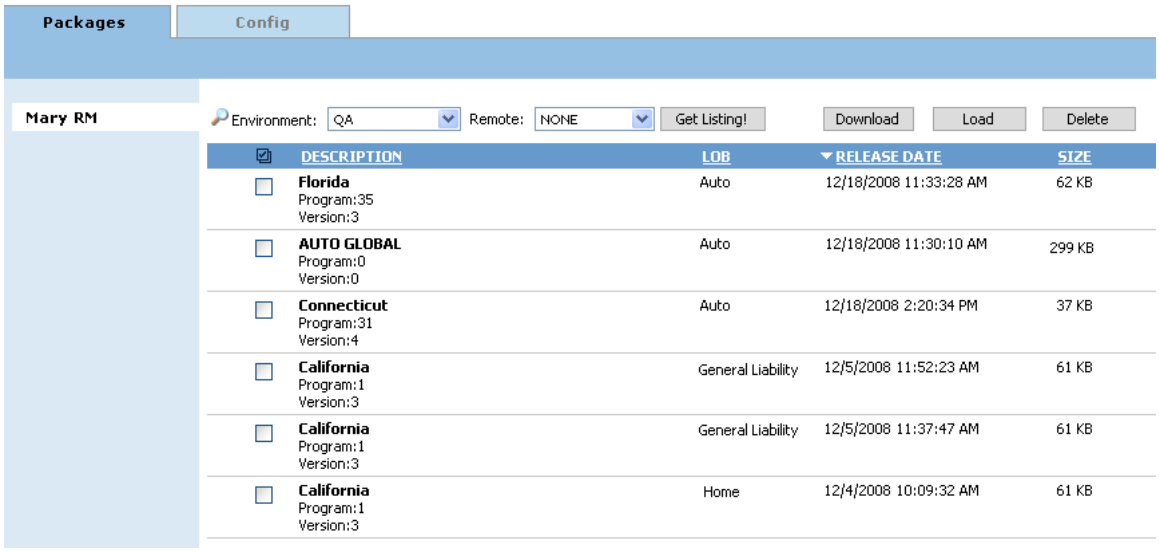


Figure 59 SoftRater Explorer Screen

3. To get a listing of packages that are available for download, select a remote server using the drop down and then click Get Listing!. For information on setting up a remote server, see Virtual File Server Management.

4. The package listing will refresh and packages that are available for download will have a package icon ( ) next to them.

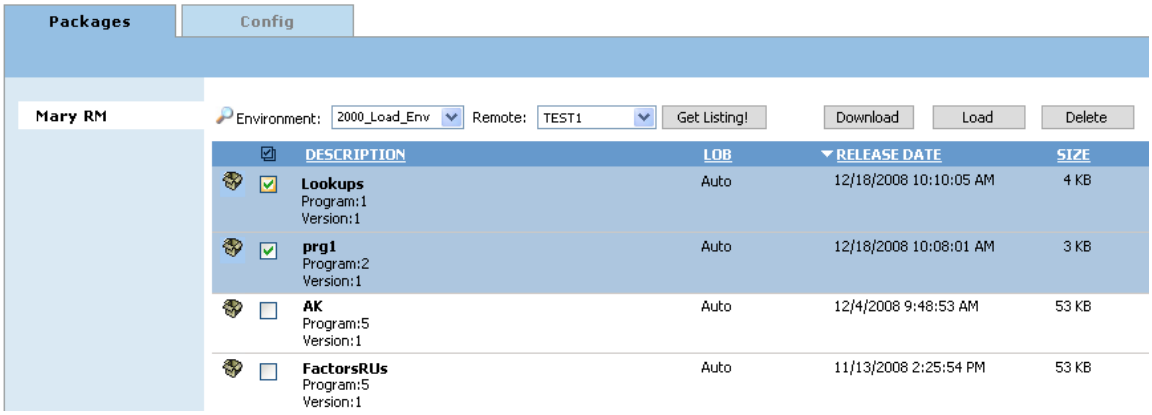


Figure 60 Selecting Packages to Download

5. Select the package(s) you would like to download and click Download.

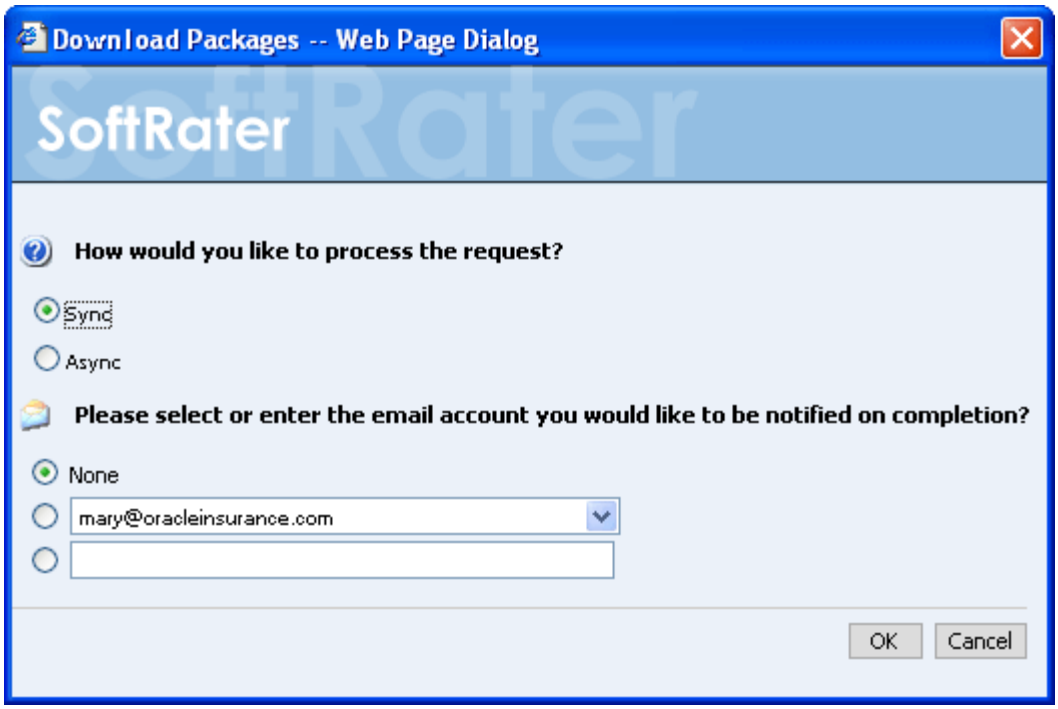


Figure 61 Downloading SoftRater Packages

Download Options

Sync:
This will download the package(s) while you wait.

Async:
This will download the package(s) in the background and, optionally, notify you at the email address you enter when downloading is complete.

Email address:
If you want to be notified when the download operation is finished, either select or enter your email address. If you would like to add your email address to the drop down list, see Explorer Configuration.

6. When you have finished choosing your options, click **OK**.

   - If you chose the Sync download option, the package listing should refresh and the downloaded packages will have been removed from the listing.
   - If you chose the Async download option, you should receive a message that the request was successful.

   When the process finishes, if you elected to receive an email, you should receive an email with the results. If you elected not to receive an email, nothing will be sent to you. The package listing will be refreshed and the downloaded packages will remain in your listing but without the package icon.

   If you receive an error message, check your configuration settings and try again.

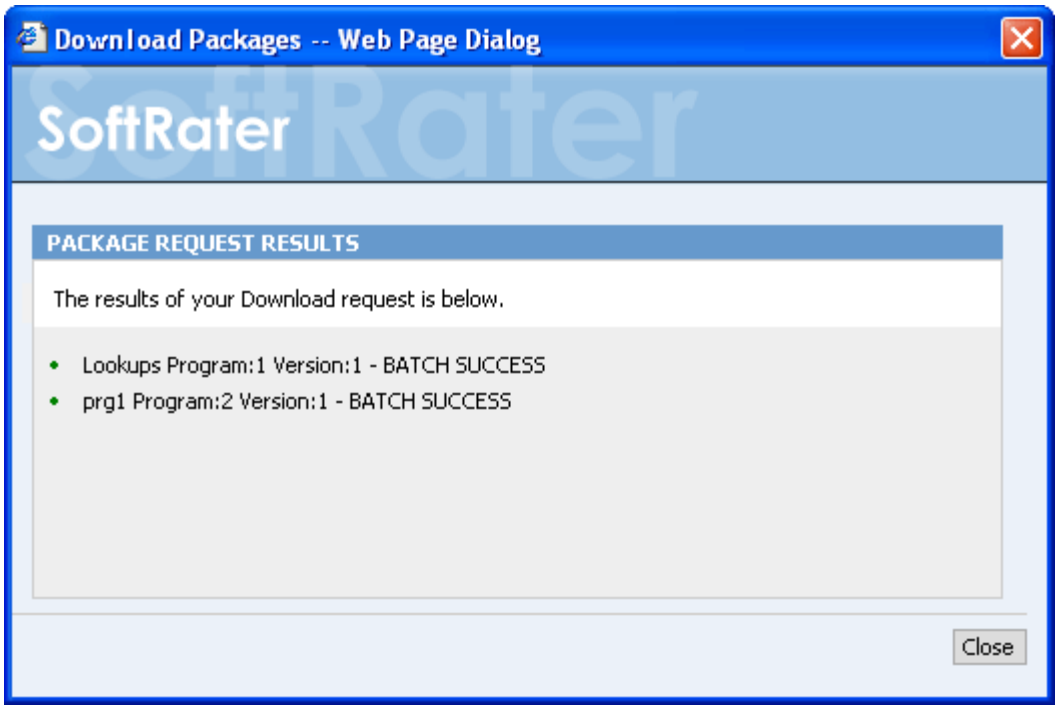


Figure 62 Download Package Results

Unloading Packages

Unloading a package removes the logic for that package from the database. The package itself remains on disk until deleted. You do not need to unload a package before loading another package for the same program and version. If you load a package for a program and version that already has a package loaded, the old package will be unloaded before the new package is loaded.

To Unload a Package

1. Navigate to the **SoftRater Explorer** for the appropriate subscriber.

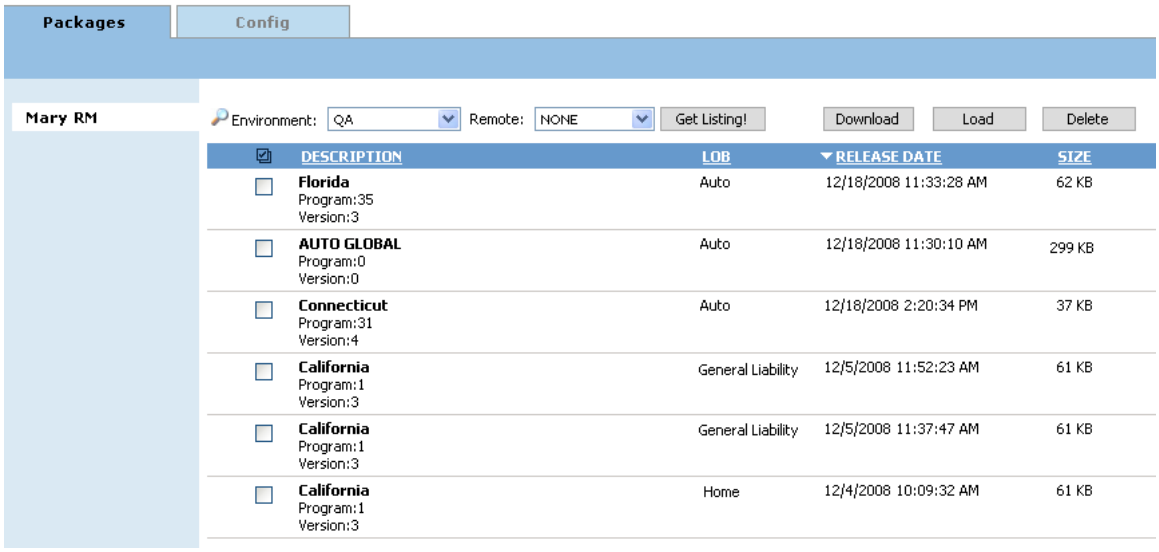


Figure 63 SoftRater Explorer Screen

2. The Explorer will automatically load the list of packages for the default environment. You can use the drop down to select a different Environment and click Get Listing! to update the list of packages.

3. Select the package(s) you would like to unload.

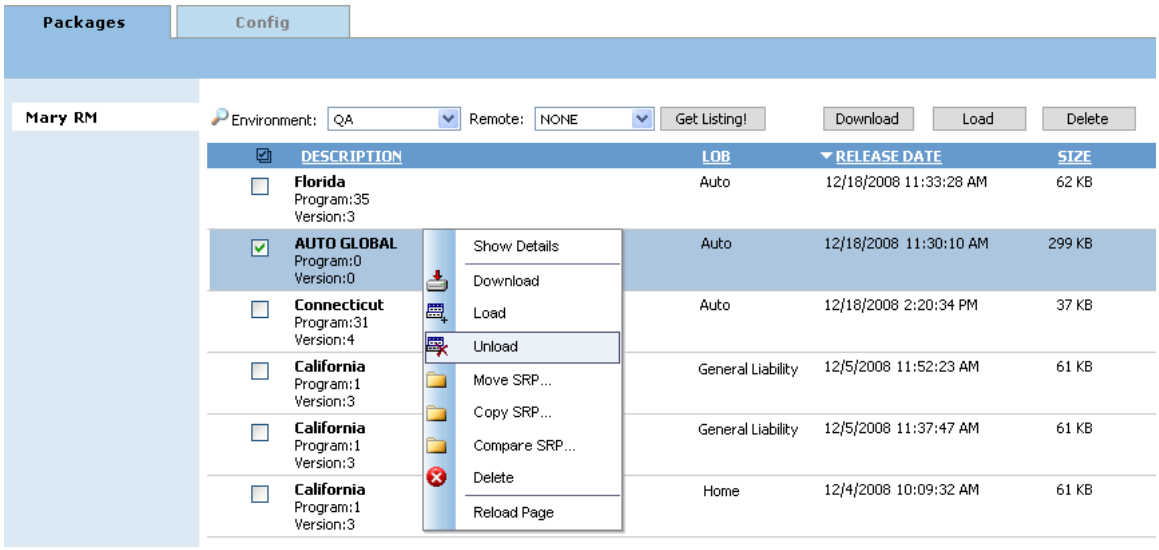


Figure 64 Selecting Packages to Unload

4. Right click one of the selected packages and choose **Unload** from the popup menu.

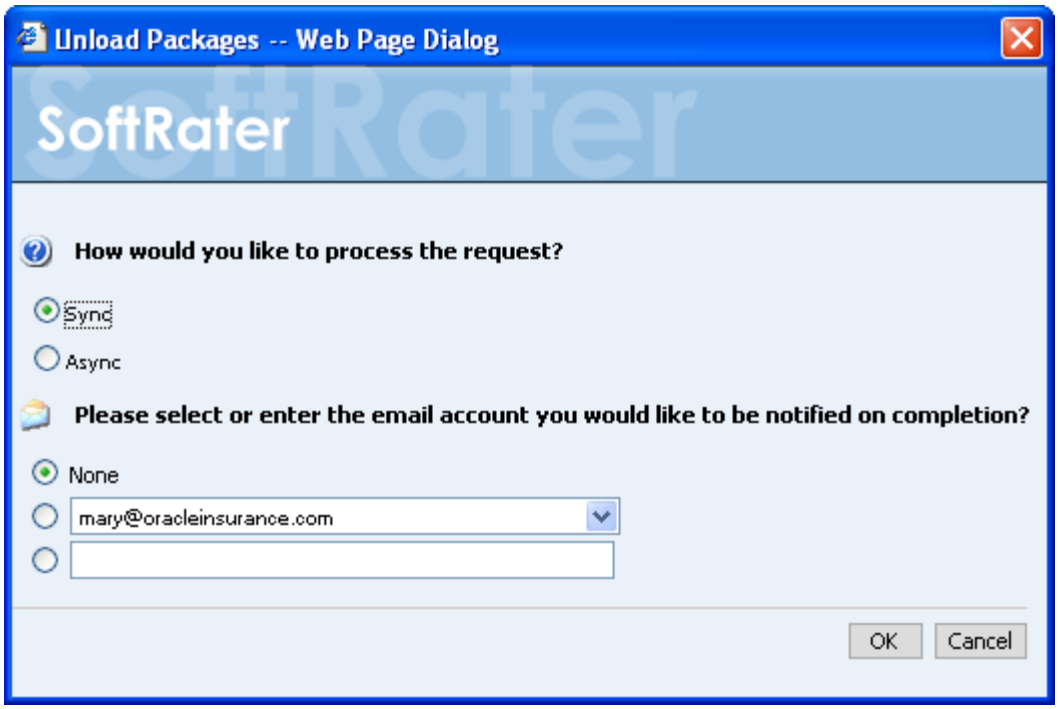


Figure 65 Unloading SoftRater Packages

Unload Options

Sync:

This will unload the package while you wait. This option is only available if you are unloading one package.

Async:

This will unload the packages in the background and, optionally, notify you at the email address you enter when unloading is complete. This is the only option available when unloading multiple packages.

Email address:

If you want to be notified when the unload operation is finished, either select or enter your email address. If you would like to add your email address to the drop down list, see Explorer Configuration.

5. When you have finished choosing your options, click **OK**.

   - If you chose the Sync unload option, the package listing should refresh and the unloaded package will no longer have an icon ( ) next to the name.
   - If you chose the Async unload option, you should receive a message that the request was successful.

   When the process finishes, if you elected to receive an email, you should receive an email with the results. If you elected not to receive an email, nothing will be sent to you. Refresh the package listing and the unloaded packages will no longer have an icon ( ) next to their name.

If you receive an error message, check your configuration settings and try again.

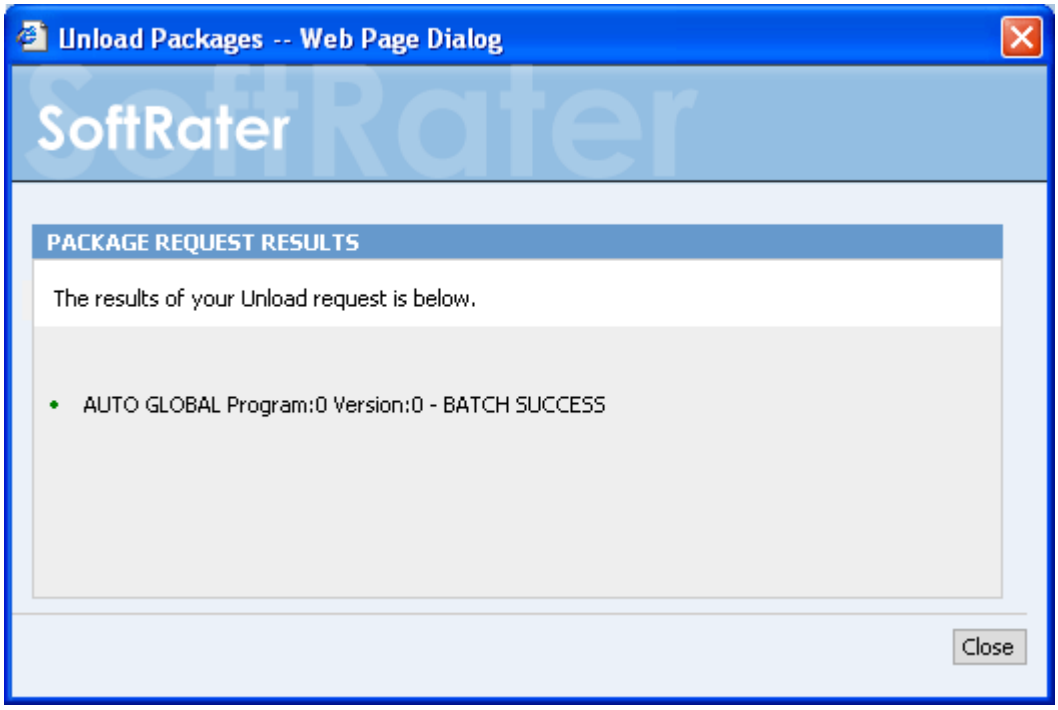


Figure 66 Download Package Results

Copying Packages

Copying a package works the same as copying a file on your hard drive. The package will be copied from the current environment and moved to the selected environment.

To Copy a Package

1. Navigate to the **SoftRater Explorer** for the appropriate subscriber.
2. The Explorer will automatically load the list of packages for the default environment. You can use the drop down to select a different environment and click Get Listing! to update the list of packages.

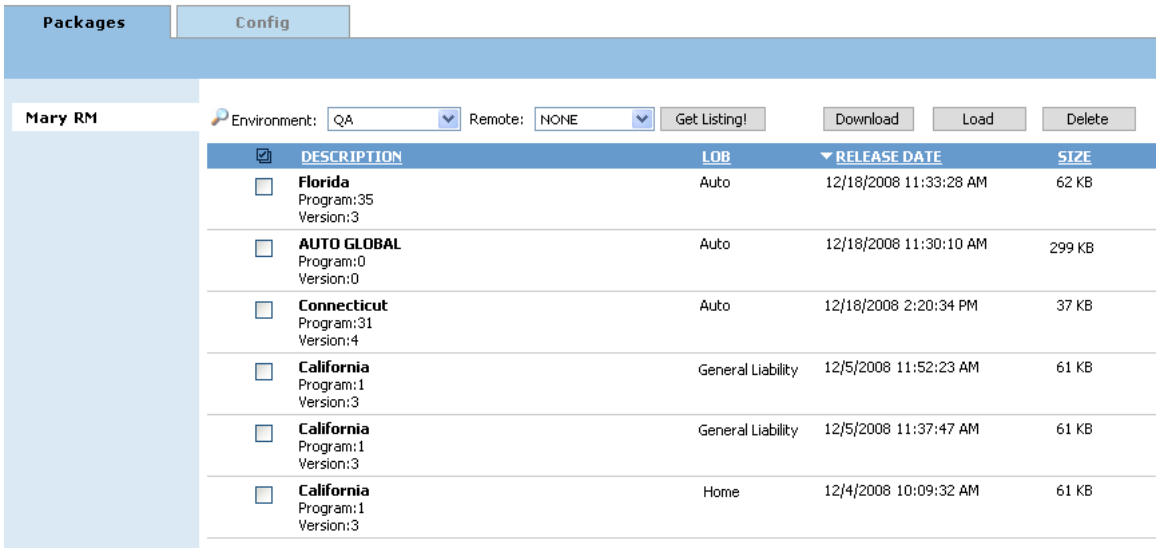


Figure 67 SoftRater Explorer Screen

3. Select the package(s) you would like to copy.

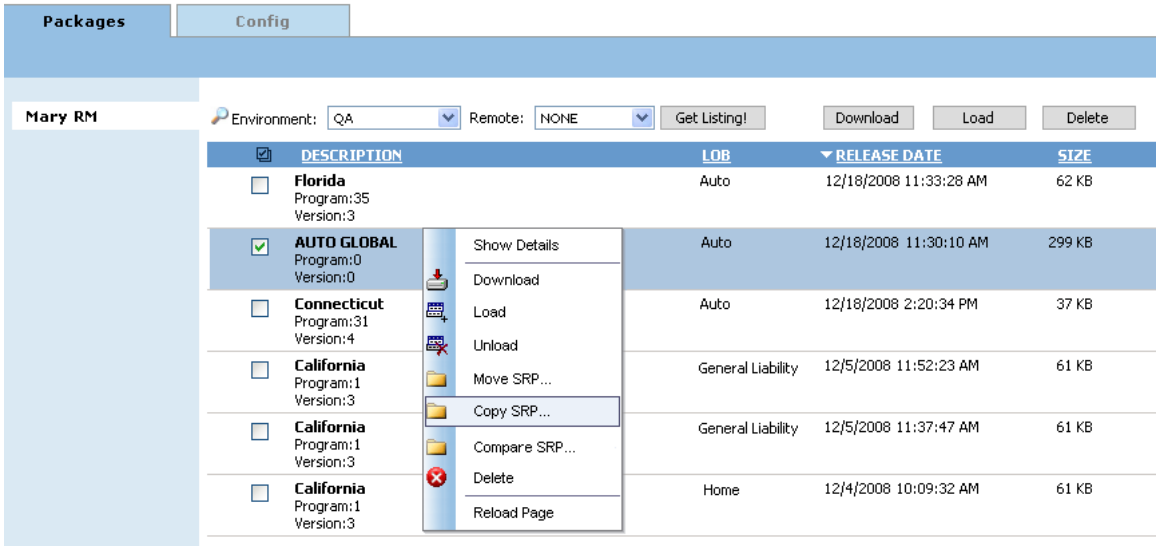


Figure 68 Selecting Packages to Copy

4. Right click one of the selected packages and choose **Copy SRP…** from the popup menu.

Figure 69 Moving SoftRater Packages

5. Select the environment you would like to copy the package(s) to and click **OK**. The package(s) will be copied and the package listing will be updated.

Deleting Packages

Deleting a package removes it from disk. Once deleted, a package cannot be reloaded.

To Delete a Package

1. Navigate to the **SoftRater Explorer** for the appropriate subscriber.
2. The Explorer will automatically load the list of packages for the default environment. You can use the drop down to select a different environment and click Get Listing! to update the list of packages.

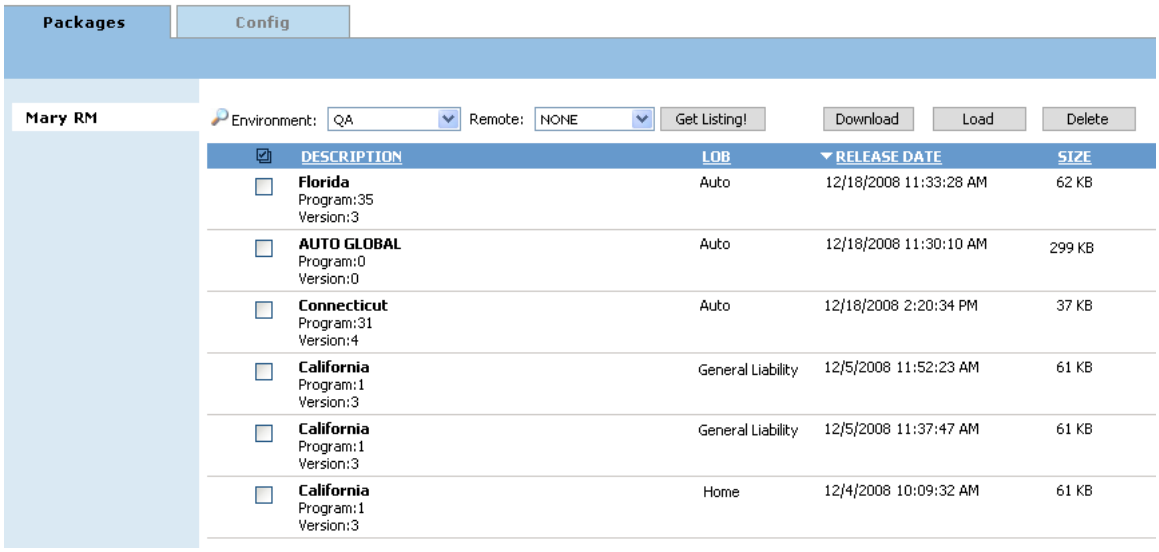


Figure 70 SoftRater Explorer Screen

3. Select the package(s) you would like to delete. You can either click Delete or you can right click and select Delete from the menu.

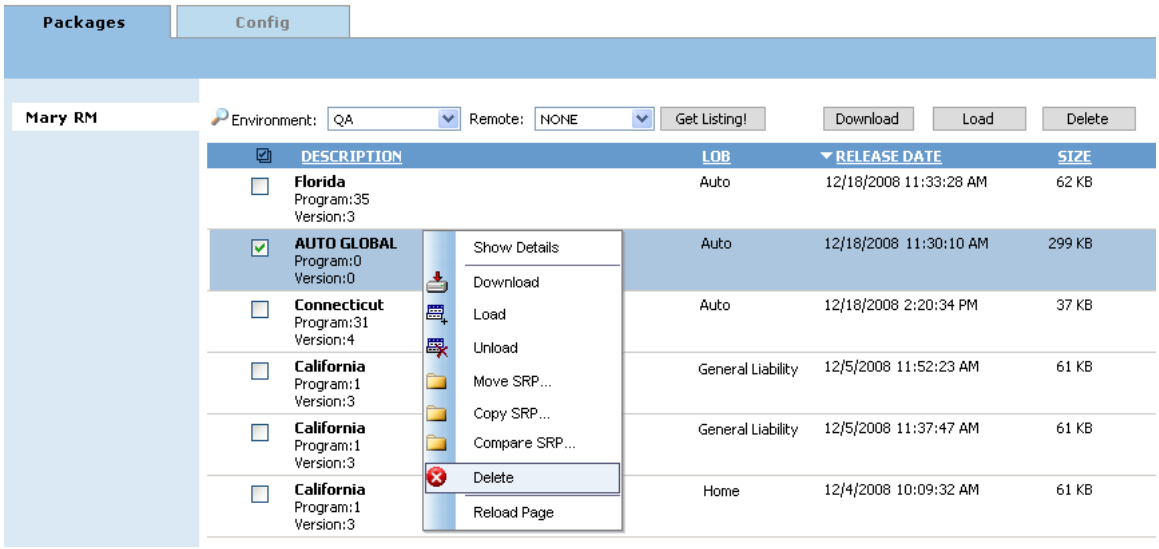


Figure 71 Selecting a Package to Delete

4. This will open the **Delete Package** window, where you can specify options for deleting the package(s).

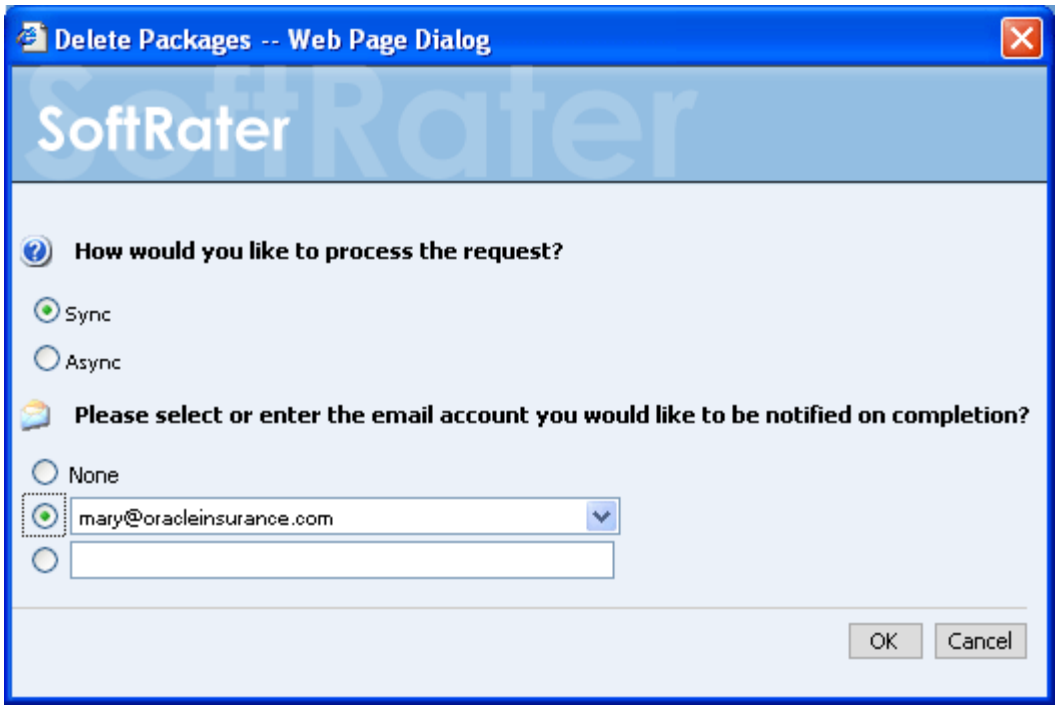


Figure 72 Deleting SoftRater Packages

Delete Options

Sync: This will delete the package(s) while you wait.

Async: This will delete the package(s) in the background and, optionally, notify you at the email address you enter when deleting is complete.

Email address: If you want to be notified when the delete operation is finished, either select or enter your email address. If you would like to add your email address to the drop down list, see Explorer Configuration.

5. When you have finished choosing your options, click **OK**.

   - If you chose the Sync delete option, the package listing should refresh and the deleted packages will have been removed from the listing.
   - If you chose the Async delete option, you should receive a message that the request was successful.

When the process finishes, if you elected to receive an email, you should receive an email with the results. If you elected not to receive an email, nothing will be sent to you. The package listing will be refreshed and the deleted packages will have been removed from the listing.

If you receive an error message, check your configuration settings and try again.

NOTE	If you delete a package that is loaded, the package will remain loaded. However, if you unload a package that has been deleted, you will not be able to reload it or move it to a different environment.

Searching for Packages

To quickly find the package(s) you need, you can use the search option available from the SoftRater Explorer.

To Search for a package

1. Navigate to the **SoftRater Explorer** for the appropriate subscriber.
2. The Explorer will automatically load the list of packages for the default environment.
3. Click the magnifying glass icon (🔎) to expand the search toolbar.

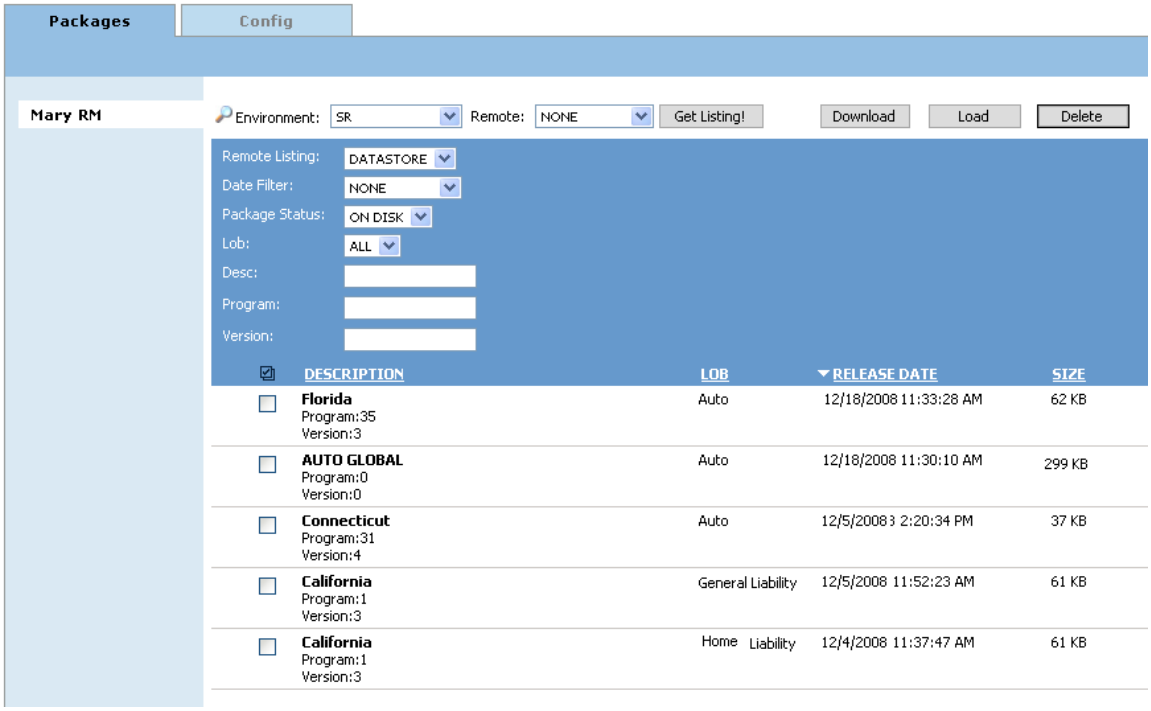


Figure 73 Searching for a Package

Search Options

Remote Listing: Allows you to filter which remote packages will be shown.

- **Global –** Will show all packages located on the virtual server, even if they are for a different subscriber.
- **Subscriber –** Will only show packages located on the virtual server if they are for the current subscriber.
- **Datastore –** Will only show packages located on the virtual server if they are for the current datastore.

Date Filter: Allows you to filter the packages based on when they were created.

- **None –** Will not apply a date filter.
- **Today** – Will only show packages that were created today.
- **This Week** – Will only show packages that were created this week.
- **This Month –** Will only show packages that were created during the current month.
- **Last Month –** Will only show packages that were created in the prior month.
- **Last Year –** Will only show packages that were created in the prior year.

Package Status: Allows you to filter packages based on whether there status.

- **On Disk –** Will only show packages that are currently stored on disk, regardless of whether or not they have been loaded to the database.
- **All –** Will show packages that are on disk and packages that have been loaded to the database, but deleted from disk.

LOB: Allows you to filter the packages based on the line of business. Only LOB's that have been set up through the configuration page will show in this listing. See Adding/Deleting a Line of Business for more information.

Desc: Name of the program the package is for. This option is case sensitive.

Program: The program number the package is for. This option treats the program number as text. Thus, if you search for **1,** this will match programs **1, 13, 21,** etc.

Version: The version number the package is for. This option is also treated as text.

4. Once you have entered your search options, click Get Listing!.

5. If you want to hide the search toolbar, click again or click hide, located in the upper right corner of the screen.

NOTE	Hiding the search toolbar does not reset the search options to default. The search options will be reset the next time you navigate to SoftRater Explorer.

Viewing Package Details

The package listing shows information about each package including the program name, version, ID, LOB, time stamp and size. Additional details, such as deployment notes, input XML and output XML are also available for packages.

To View Details about a Package

1. Navigate to the **SoftRater Explorer** for the appropriate subscriber.

2. Select the package you would like to see details about.

3. Right click the selected package and choose **Show Details** from the popup menu.

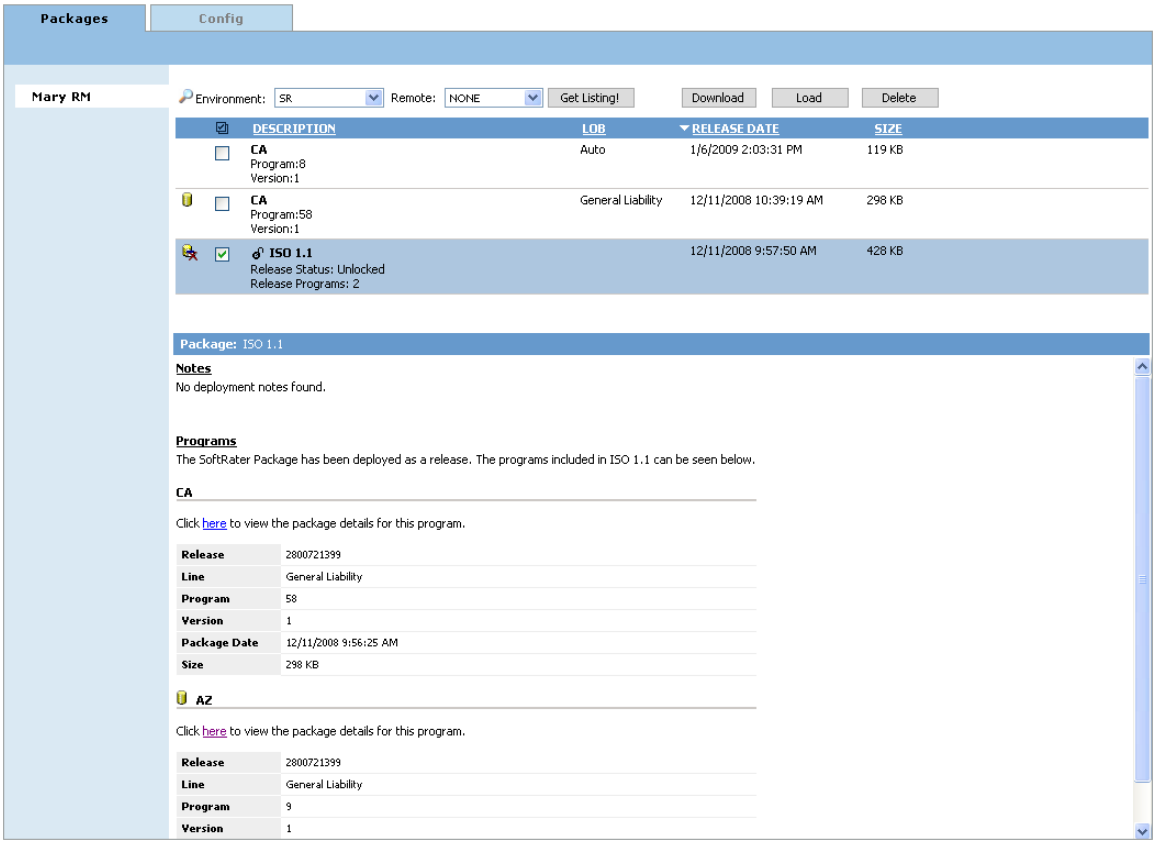


Figure 74 Selecting a Package to View Details

4. A bottom frame will open that has information about the package.

In Figure 74, the details displayed are for a Release. The icon in front of the release indicates that a package has been changed and unloaded since the Release was packaged. When this happens, the updated package will be placed in the list and can be re-packaged.

Details for Viewing

Package details will vary and not all packages may not contain details.

Notes: When a user creates a full package, they have the option of including deployment notes. Any notes included when the package was created will be shown here.

Programs: If more than one program is in the packages, the program details will be listed out.

Insbridge Rating Input XML: Allows you to see what the input XML should look like.

Insbridge Rating Output XML: Allows you to see what the output XML will look like.

Translator Files: Allows you to see samples translator files for use with custom XML. Translator files will only be listed if the user has selected this option when creating a full package.

Local Insbridge Input Translators: Allows you to see the name and the file used for the input translations. Local Insbridge input translators will be listed only if the user has selected this option when creating a full package.

NOTE	The bottom frame will remain open with the selected package until you right click and choose **Show Details** again.

Compare SRP Report

The Compare SRP report will compare two different packages in IBFA. The differences that will be recognized are:

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

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

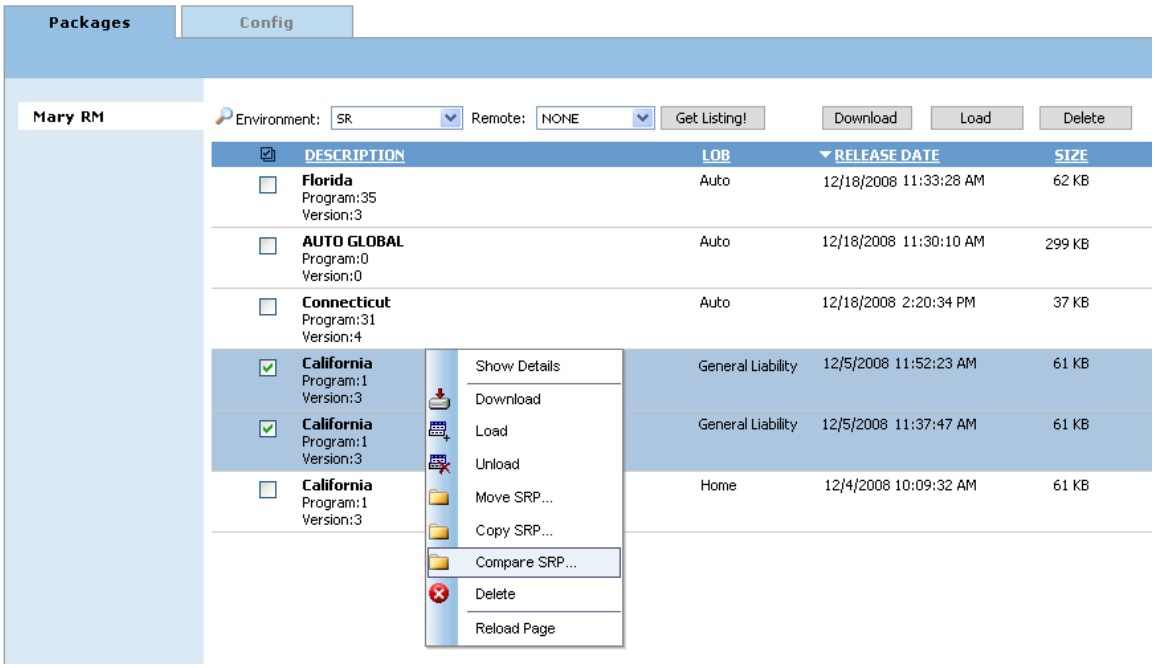


Figure 75 Comparing Packages

- The packages must be from the same program. They can be the same version or different versions.
- Packages must be created in RateManager 3.12. Lower versions of RateManager will not have this feature.

Running a Package Difference Report

1. From the Packages screen, right click on the two programs you want to run a Package Difference Report on. They both must be selected.

2. Select **Compare SRP** from the right click menu. The Insbridge Document Viewer will be displayed. Your report will be generated in a moment. Reports can be saved to your local drive or network or printed. No editing can be done on the Insbridge Document Viewer.

NOTE	*OBI Publisher must be installed and running in order for Package Difference Reports to be displayed. If you receive an OBI Publisher error, please see* OBI Publisher *on page 77.*

Package Icons

Some packages/releases on the SoftRater Explorer packages tab will have icons in front to indicate that an action has taken place.

Icon	Description
	A package has been loaded.
	A package contained within this release has been unloaded from the release. Packages are unloaded when an updated version is created. To see which package has been unloaded, highlight the release and right click. Select Show Details. The lower portion of the screen will display the contents of the release. If the package icon is displayed, that package is still included. If the package icon has been removed, that package has been unloaded.
	A release is unlocked an open for updating.
	A package that was created using ESI. This icon will be displayed in front of the package name. ESI packages are not system generated. ESI packages are entered directly into the database. See External API Access within this guide and The ESI User Guide for information on working with ESI.
	A package that is available for download. This icon will be displayed when a package is located on another server and can be downloaded. Once the package is downloaded, the icon will be removed.

7

SoftData Test Interface

The SoftData Test Interface allows you to test a SoftData request file that is in InsbridgeDataRequest.XML format. You can select the file or you can copy from a source and paste in the text box.

To Test a File Using the SoftData Test Interface

1. Using the menu tree, click **SoftData**.

2. This will open the **SoftData Test Interface** page.

Figure 76 SoftData Test Interface

3. Browse for an XML file to use or copy and paste an XML file into the large text box. If you browse for an XML file, you can view the XML in the large text box by clicking GetFile. This allows you to edit the XML before rating.

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

4. When you are ready to submit the file, click Execute!.

5. The file will be submitted and the results will be shown in the results box.

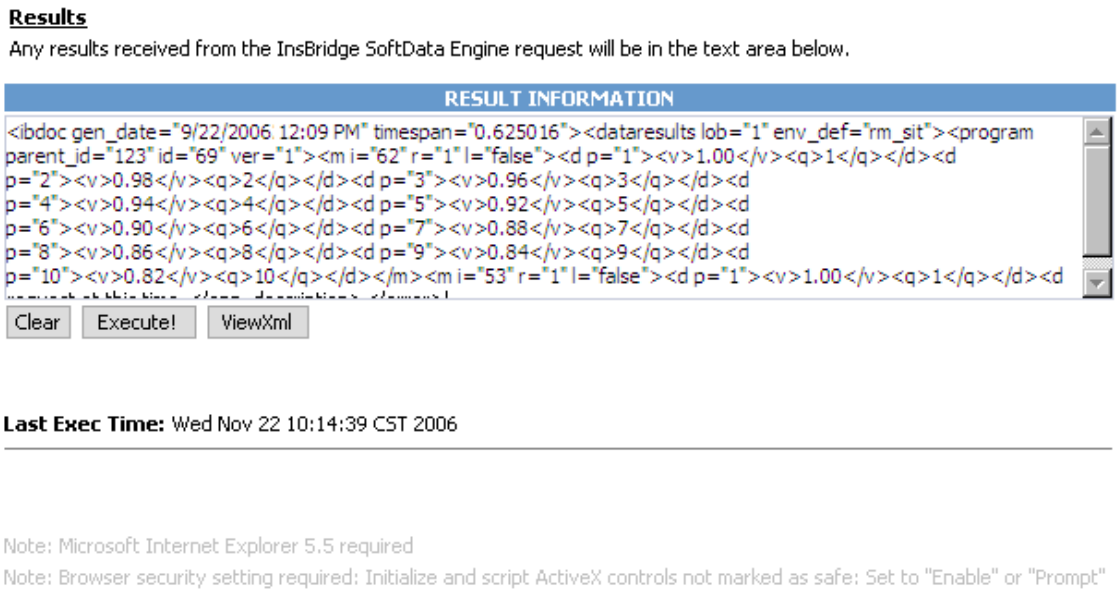


Figure 77 Test Results

6. To view the XML file in Internet Explorer, click ViewXml.

8

Services

The Services page allows you to start and stop the **Insbridge Message Service** and **Insbridge Task Manager**. It also allows you to view messages, configure the Message Service and view tasks.

Navigating to the Services Page

1. Using the menu tree, select **Services**.

2. This will open the **Services** page.

Figure 78 Insbridge Services Screen

3. From here you can interact with the Insbridge Message Service.

Introduction to the Insbridge Message Service

The Insbridge Message Service is a message queue listener that routes messages to an assembly for execution.

For example, when a user submits a rate request in BatchManager, that request gets picked up by the Insbridge Message Service and delivered to the batch-rating client. The batch-rating client then rates the file and notifies the user when the results are ready. If the Insbridge Message Service is not started, the request will remain in the queue until it is either deleted or the service is started, at which point the request will be sent.

Starting & Stopping the Message Service

Framework Administrator provides the ability to start and stop the Message Service. When stopped, messages will be sent to the appropriate queue. When the Message Service is started again, the messages will be processed on a first-in, first-out basis.

The Message Service has two buttons to accomplish this task, Start and Stop. Only one button will be enabled at a time. If the start button is enabled, it means the service is currently stopped. If the stop button is enabled, it means the service has been started. The grayed out button is the current operation status. For example, if the start button is grayed out, the service has been started. If the stop button is grayed out, the service has been stopped.

To Start or Stop the Message Service

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

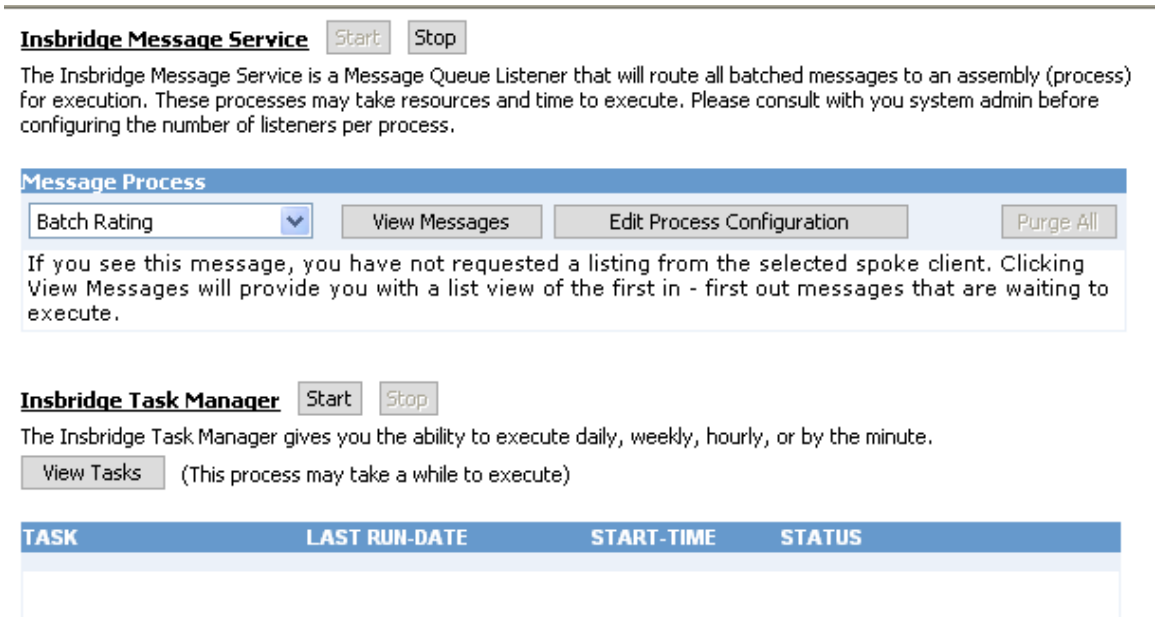


Figure 79 Insbridge Services Screen

2. Next to **Insbridge Message Service**, click Start or Stop.

3. After a few seconds, the buttons will refresh to indicate if the service is started or stopped.

4. If one of the clients is currently performing an operation, you may receive an error message when you attempt to stop the service. Simply click Stop again to stop the service. The client will abort the operation and the service will be stopped.

OBI Publisher

Insbridge Message Service must be started for OBI Publisher to generate reports. If users receive an OBI Publisher error, there are three likely causes:

- OBI Publisher was not installed or improperly installed. Please return to the installation folder and re-install OBI Publisher.
- The Insbridge message service has not been started. Please start the service and attempt to run the report again.
- The ports required by OBI Publisher are in use. This error could be caused by one or both ports required by OBI Publisher being used by another program. Ports 9704 and 23791 are both required by OBI Publisher. If you have a conflict with ports, please log a Service Request using My Oracle Support at http://metalink.oracle.com.

Viewing Messages

When a message is submitted to the Message Service and cannot be immediately routed to the appropriate client, the message gets placed in a queue. This can happen if the Message Service is stopped or the client is currently working on another request. The Message Service contains six queues. Each queue operates on a first-in, first-out basis.

To View Messages in the Queue

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

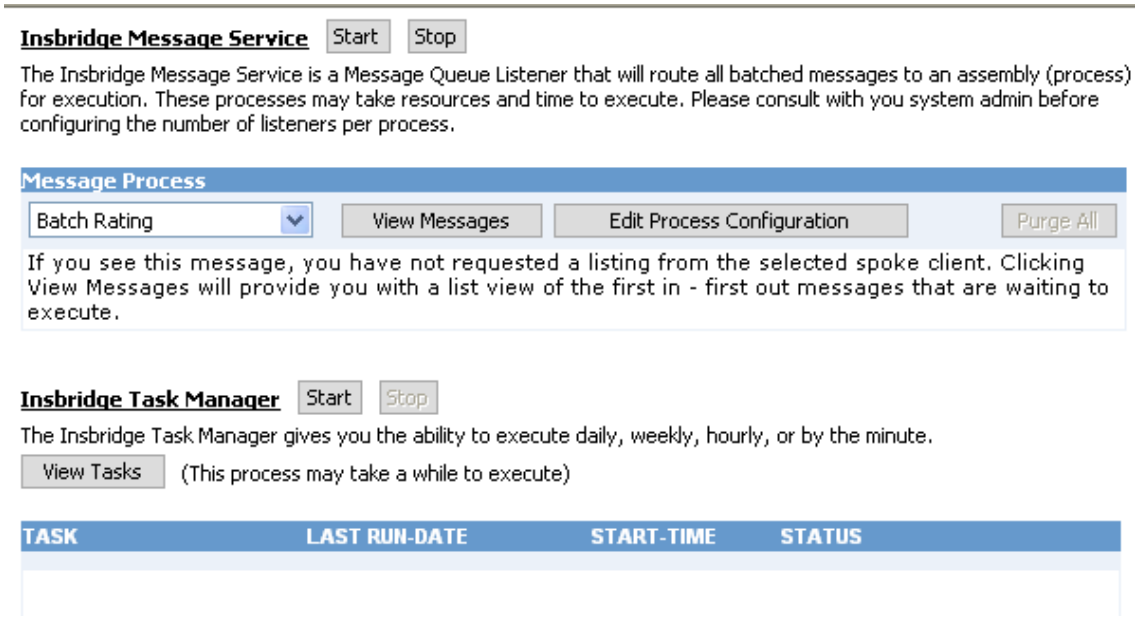


Figure 80 Insbridge Services Screen

2. Select the appropriate client from the drop down.
    - Batch Rating
    - PricingManager
    - SoftRater - Package
    - Broker - Request
    - Broker - Response
    - Administration
3. Click View Messages.
4. The listing will refresh and show any messages that are currently in the queue.

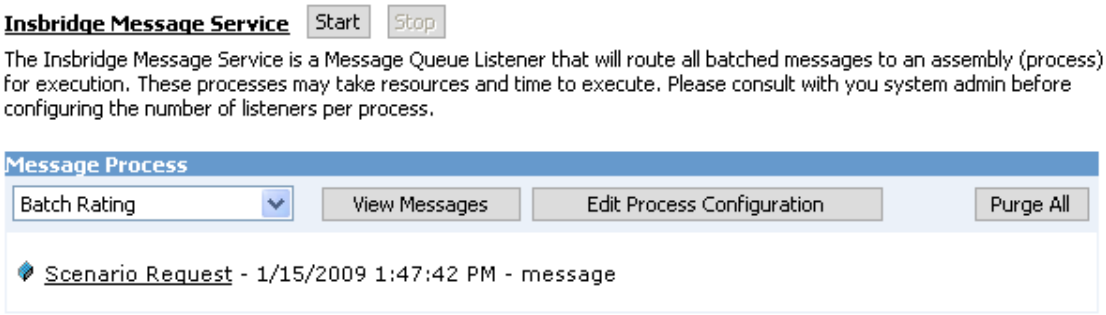


Figure 81 Insbridge Message Service

5. To view details on a specific message, click the underlined portion (in this case, Scenario Request).
6. Information about the message will open in a separate window.

.

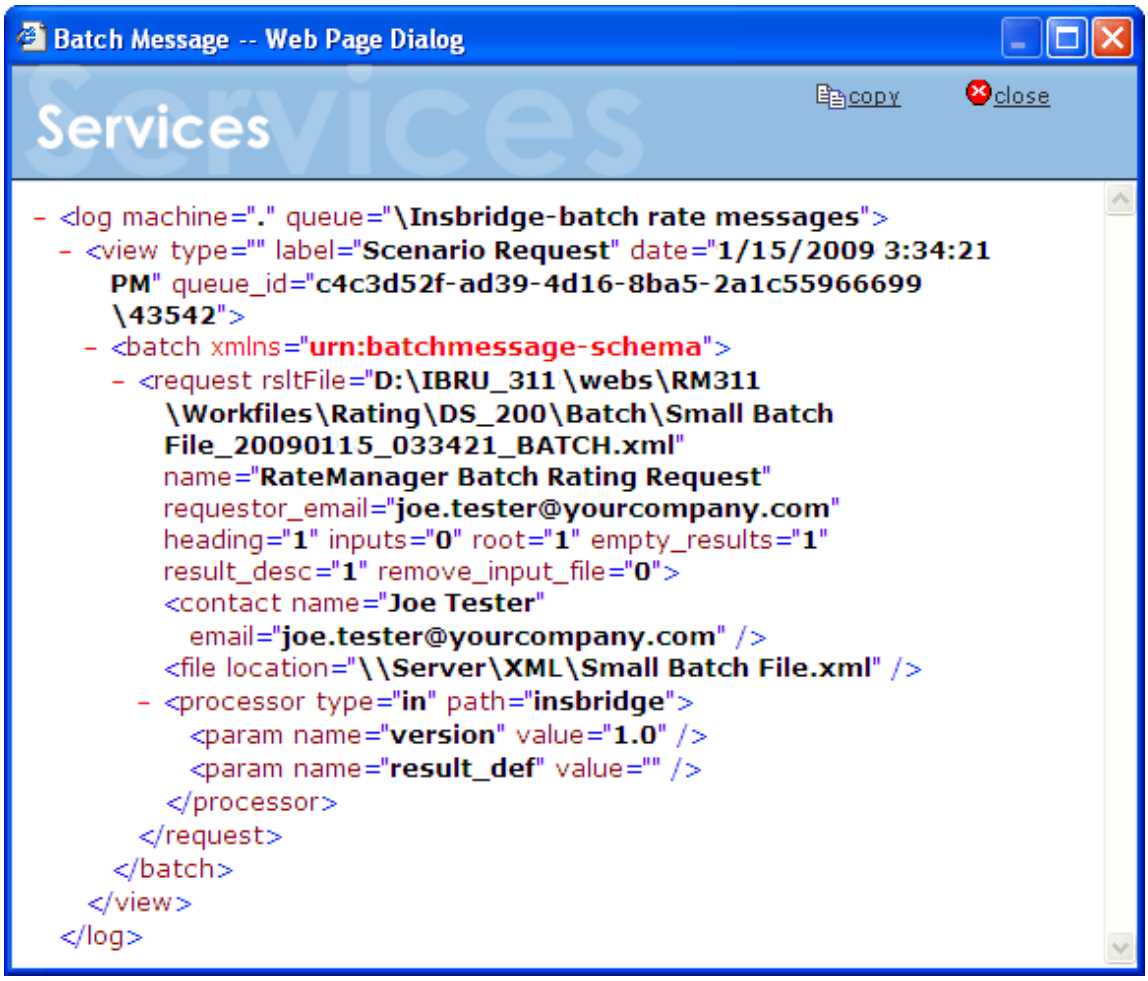


Figure 82 Batch Message Information

You can copy the contents of the message to the clipboard by clicking Copy.

Deleting Messages

At times, you may want to prevent messages that are currently in the queue from being submitted to the appropriate client. To do this, you can delete the messages from the queue.

To Delete Messages from the Queue

This will delete all messages from the selected queue.

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

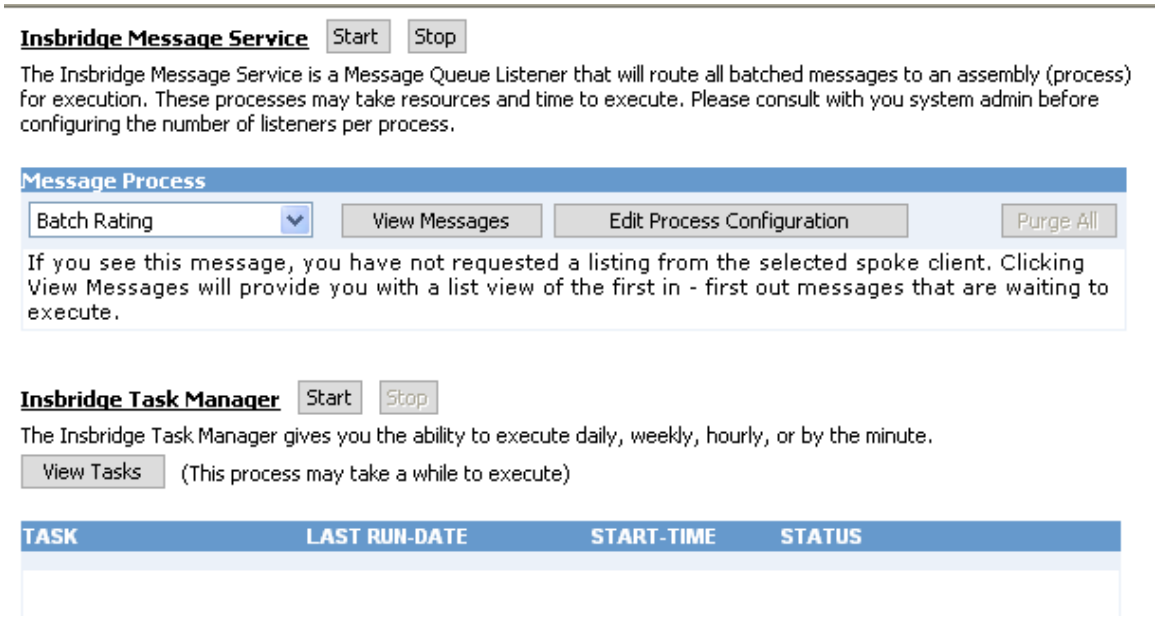


Figure 83 Insbridge Services Screen

2. Select the appropriate client from the drop down.

   - Batch Rating
   - PricingManager
   - SoftRater - Package
   - Broker - Request
   - Broker - Response
   - Administration

3. Click View Messages.

4. The listing will refresh and show any messages that are currently in the queue.

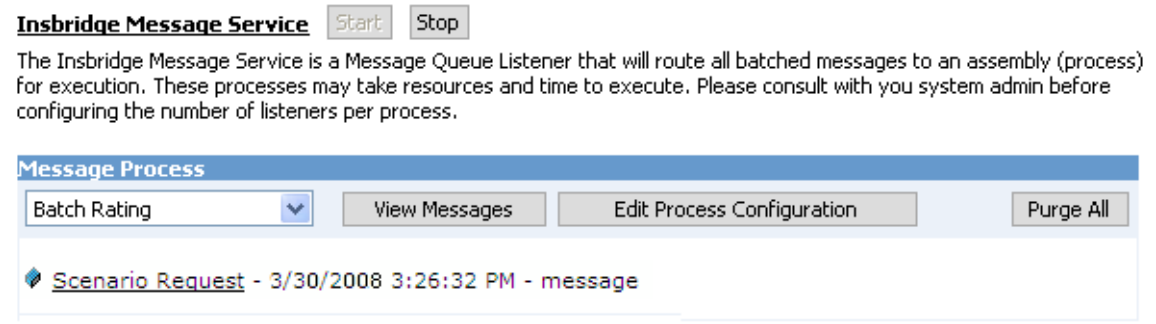


Figure 84 Insbridge Message Service

5. Click Purge All. All messages will be deleted from the selected queue and the listing will refresh.

Process Configuration

For each client, the Framework Administrator allows you to change how many threads are used. Threading enables a process to finish faster by splitting the process into smaller processes that run quasi-simultaneously. On multiprocessor systems, using multiple threads enables the operating system to assign the threads to different processors.

In addition, the Framework Administrator also enables you to change the administrator email address for each client. When a process fails, an email will be sent to the person who initiated the process, as well as to the administrator email addresses listed for the client of that process.

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

Editing the Process Configuration for a Client

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

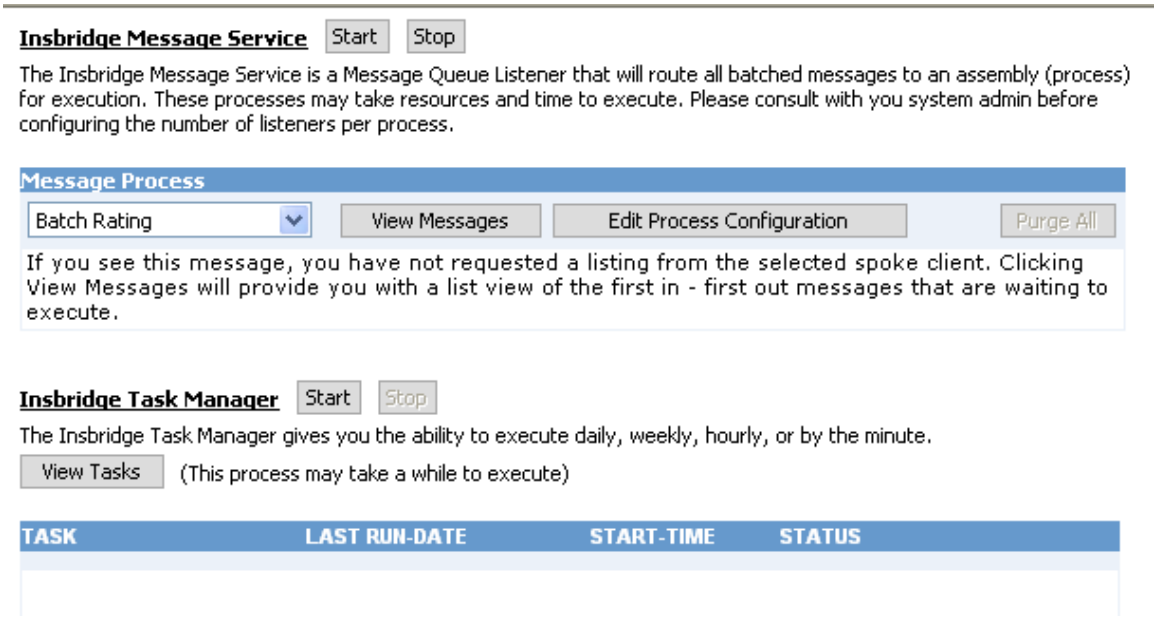


Figure 85 Insbridge Services Screen

2. Select the appropriate client from the drop down.
    - Batch Rating
    - PricingManager
    - SoftRater - Package
3. Click

.
4. This will open the **Process Configuration** window for the selected client.

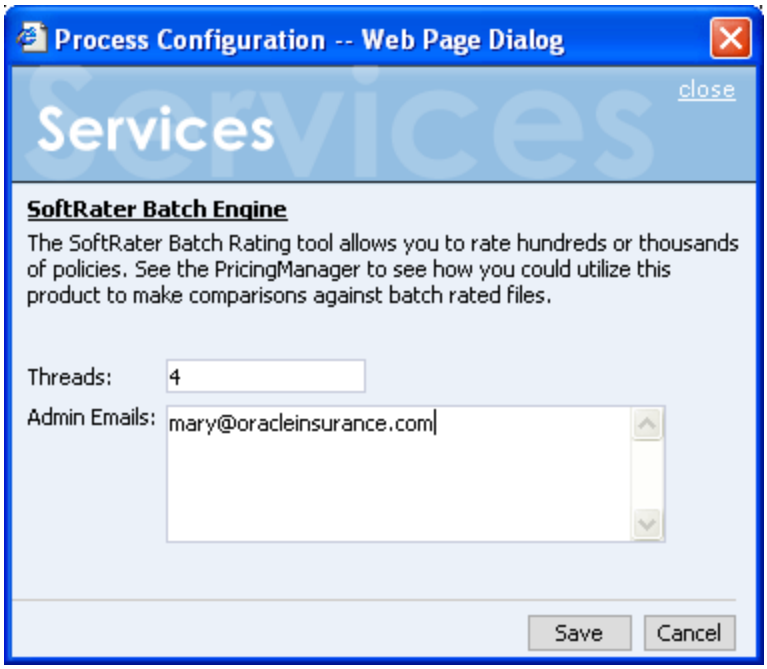


Figure 86 Process Configuration Window

5. Enter an integer for the number of threads and email addresses separated by semicolons (;).

6. Click **Save** when finished to save your changes and return to the **Services** page.

Introduction to 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, for example, clearing out temporary files, and generally are not changed or altered once in place. Tasks are entered when IBFA is set up. To edit or delete a task, you must return to the IBFA setup files. Please contact Insbridge Support for more information.

Starting & Stopping Task Manager

Framework Administrator provides the ability to start and stop Task Manager. When stopped, tasks will not be performed. When Task Manager is started again, the tasks will be processed as scheduled. Tasks that are past due will not be processed. For example, if a temp file cleanup is scheduled nightly and the Task Manager was stopped four days ago, the temp file cleanup will not be run four additional times.

Task Manager has two buttons, Start and Stop. Only one button will be enabled at a time. If the start button is enabled, task manager is currently stopped. If the stop button is enabled, task manager has been started. The grayed out button is the current operation status.

Figure 87 Insbridge Task Manager

Viewing Task Details

To view the currently scheduled tasks, click View Tasks. The tasks will be listed below. To collapse the task details, click the corresponding up arrow ( ).

9

Logs

Error Log

The Error Log allows you to view all errors encountered while using RateManager. It also allows you to view errors generated by an Insbridge application. These events are separated into two types.

- **Database Events** are triggered when a user tries to do something they are not allowed to do (such as trying to delete a used variable).
- **Event Log Events** are triggered when an Insbridge application either fails to do what it is supposed to do, or successfully completes an operation.

To Navigate to the Error Log

1. Using the menu tree, click the plus box (⊞) next to **Logs** to expand it and then click **Error**.

2. This will open the **Error Log**.

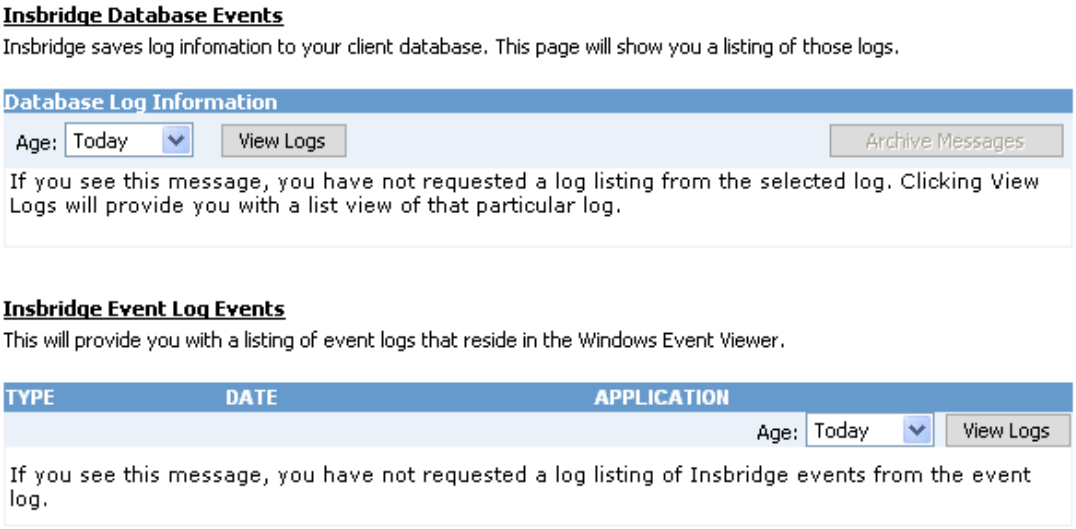


Figure 88 Insbridge Error Log

3. From here, you can view **Database Events** and **Event Log Events**.

Database Events

Database events are triggered when a user encounters an error while using RateManager.

For example, if a user tries to delete a variable that is still being used, RateManager will display an error message that the variable cannot be deleted, and the error will be logged in the database event log.

To View the Database Event Log

1. Navigate to the **Error Log**.

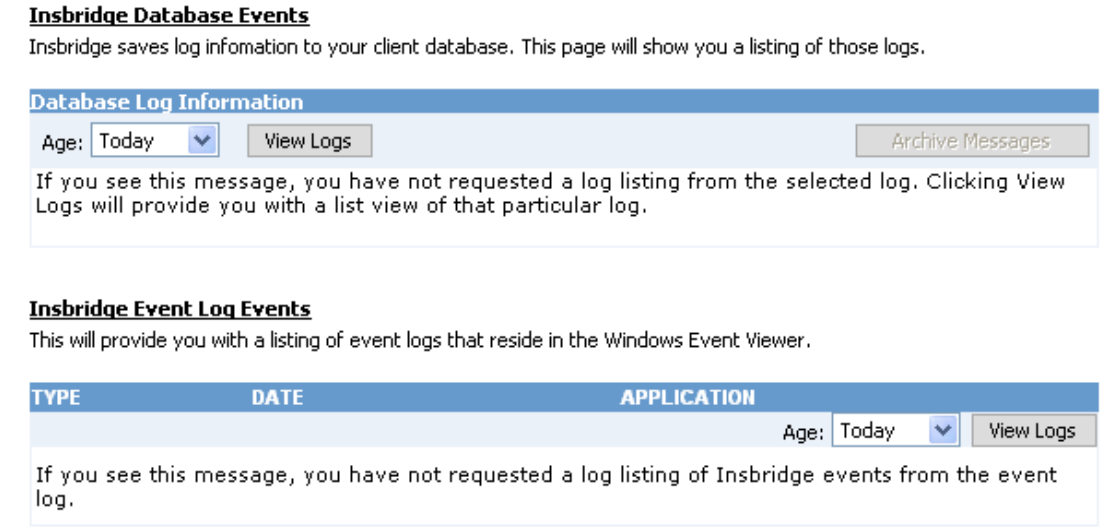


Figure 89 Insbridge Error Log

2. Select the **Age** drop down under **Insbridge Database Events** to select the age limit for the events you want to view. Click View Logs when you are finished making your choice.

3. The database log will update to show the events you requested.

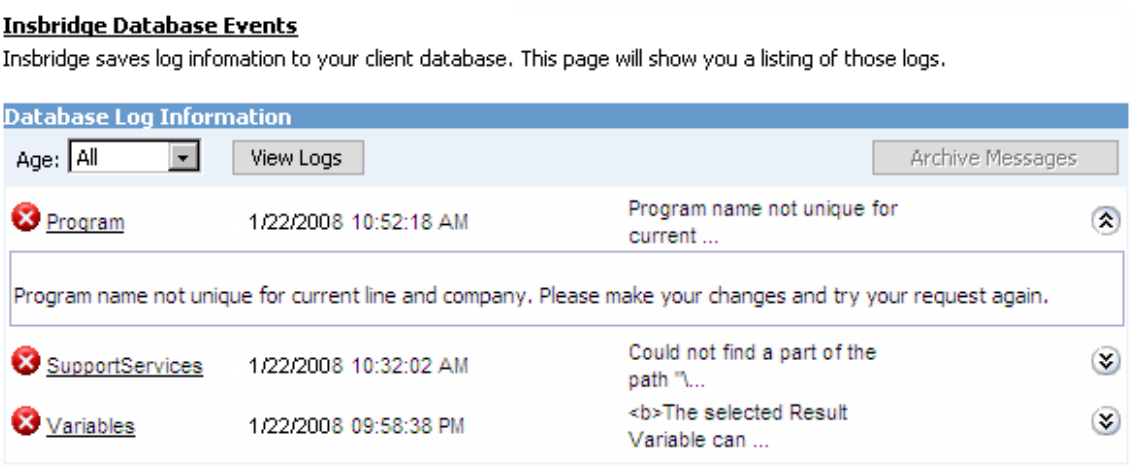


Figure 90 Insbridge Database Events

4. To view details about an event, click the corresponding down arrow ( ).The details will be displayed in an information box.

5. To email an event, click the underlined portion of the event to open the email form.

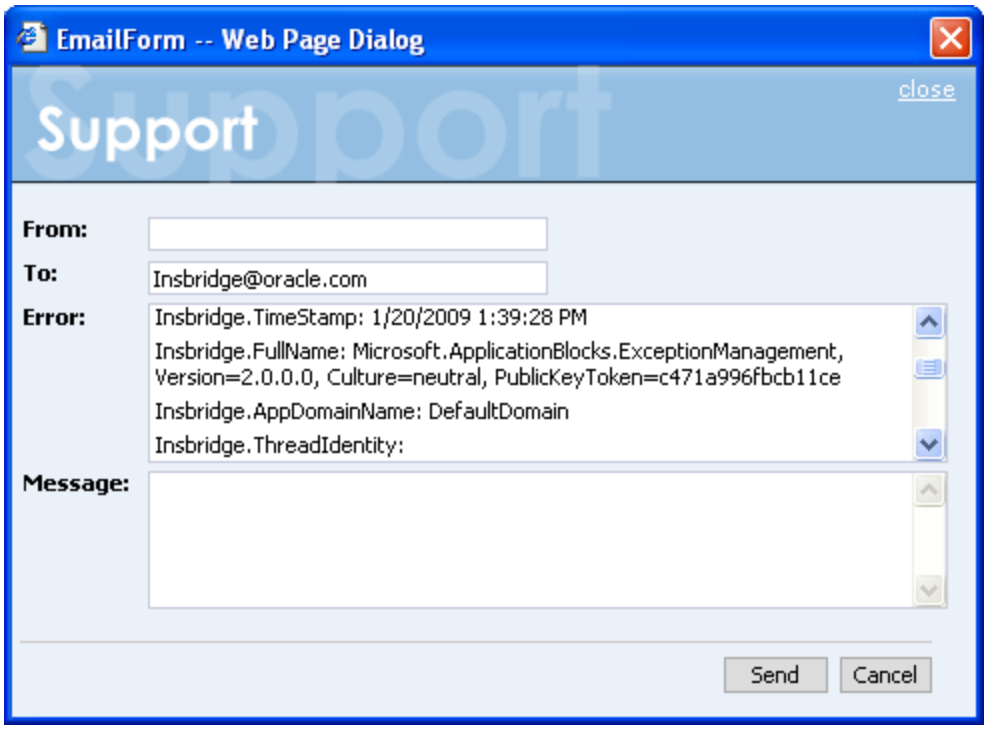


Figure 91 Emailing an Event

6. Enter your email address and the address you want to send the error to. You can send the error to multiple addresses by separating them with a semicolon (;). You can also enter a message to give further details about the error. The actual error message cannot be edited. When you are ready to send the message, click Send.

Event Log Events

When an Insbridge application generates an error, it logs the event in the server's event viewer. Error events occur when an Insbridge application fails to do what it is supposed to. For example, if the Insbridge Message Service fails to start, an error event will be logged.

In addition to error events, information events are also logged in the event viewer. An information event describes the successful completion of an operation by an Insbridge application. For example, when the Insbridge Message Service starts successfully, an information event is logged.

To View the Event Log

1. Navigate to the **Error Log**.

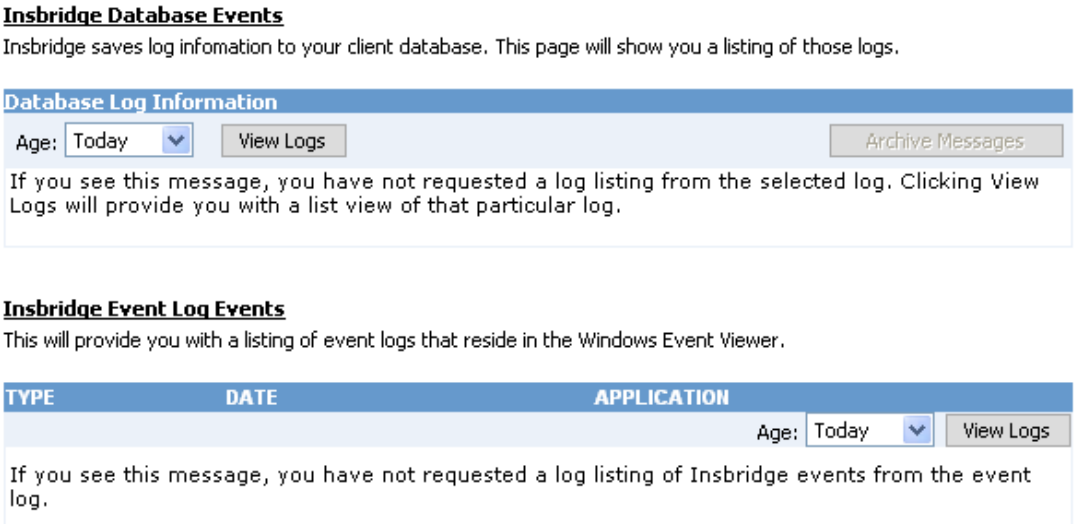


Figure 92 Insbridge Error Log

2. Select the **Age** drop down under **Insbridge Event Log Events** to select the age limit for the events you want to view. Click View Logs when you are finished making your choice.

3. The event log will update to show the events you requested.

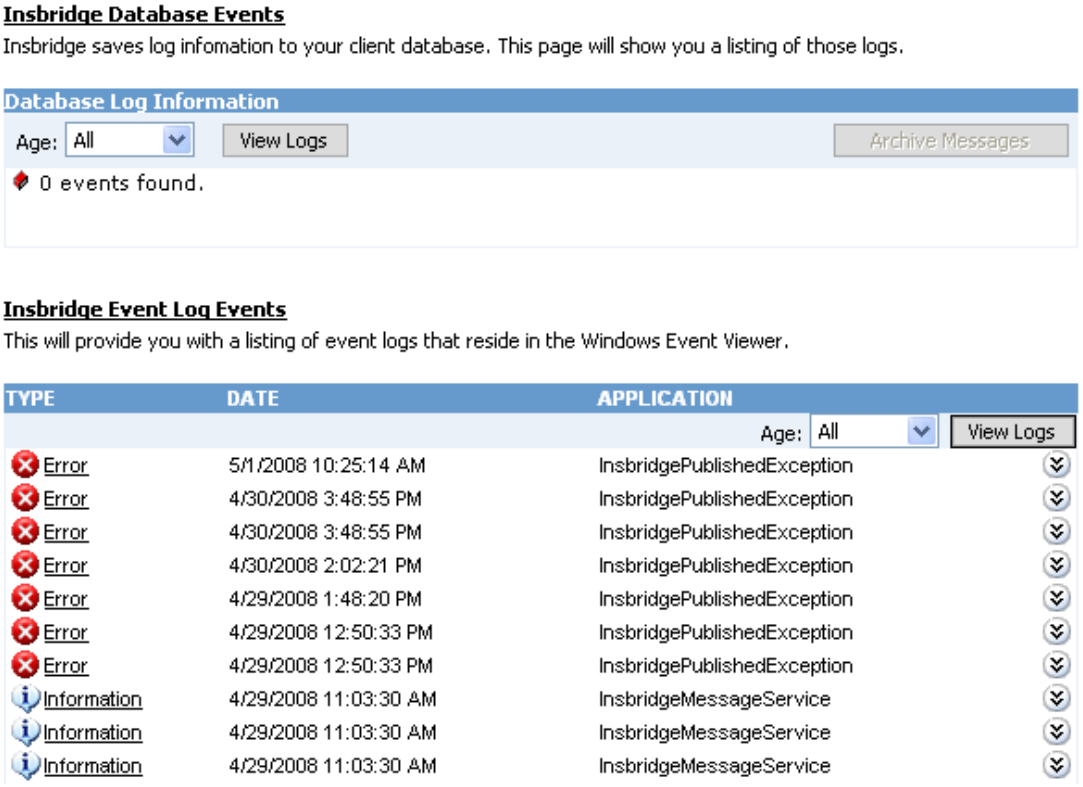


Figure 93 Insbridge Event Log Event

4. To view details about an event, click the corresponding down arrow (⌄). The details will be displayed in an information box.

5. To email an event, click the underlined portion of the event to open the email form.

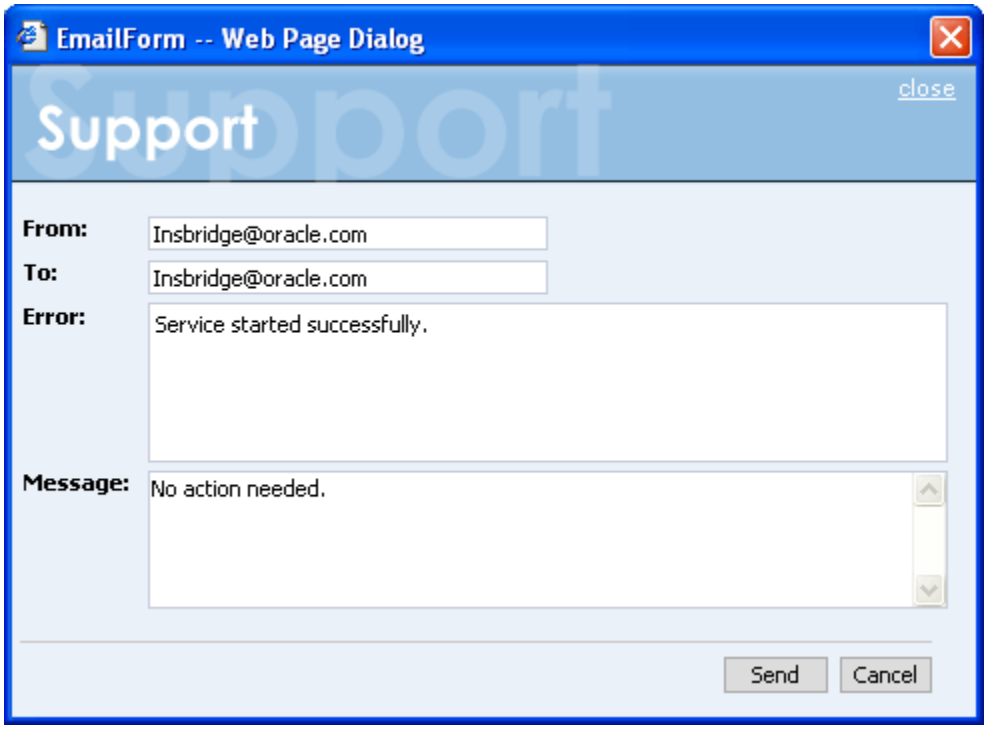


Figure 94 Emailing an Event

6. Enter your email address and the address you want to send the error to. You can send the error to multiple addresses by separating them with a semicolon (;). You can also enter a message to give further details about the error. The actual error message cannot be edited. When you are ready to send the message, click Send.

Introduction to the Audit Log

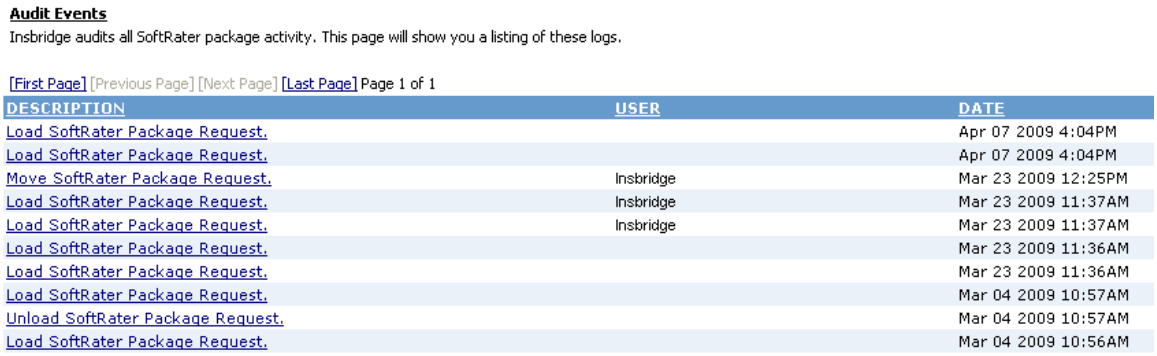
The Audit Log keeps track of all SoftRater package activity, known as audit events. There are four types of audit events:

- **Download:** An event that records the downloading of a package.
- **Load:** An event that records the loading of a package.
- **Unload:** An event that records the unloading of a package.
- **Delete:** An event that records the deletion of a package.

Viewing the Audit Log

1. Using the menu tree, click the plus box (⊞) next to **Logs** to expand it and then click **Audit**.

2. This will open the **Audit Log**.



Audit Events

Insbridge audits all SoftRater package activity. This page will show you a listing of these logs.

[First Page] [Previous Page] [Next Page] [Last Page] Page 1 of 1

DESCRIPTION	USER	DATE
Load SoftRater Package Request.		Apr 07 2009 4:04PM
Load SoftRater Package Request.		Apr 07 2009 4:04PM
Move SoftRater Package Request.	Insbridge	Mar 23 2009 12:25PM
Load SoftRater Package Request.	Insbridge	Mar 23 2009 11:37AM
Load SoftRater Package Request.	Insbridge	Mar 23 2009 11:37AM
Load SoftRater Package Request.		Mar 23 2009 11:36AM
Load SoftRater Package Request.		Mar 23 2009 11:36AM
Load SoftRater Package Request.		Mar 04 2009 10:57AM
Unload SoftRater Package Request.		Mar 04 2009 10:57AM
Load SoftRater Package Request.		Mar 04 2009 10:56AM

Figure 95 Audit Log

3. The **Audit Log** shows twenty-five events per page. You can navigate between the pages using the navigational links, First Page, Previous Page, Next page and Last Page located at the top of the page.

4. Click the underlined description to view details about the event.

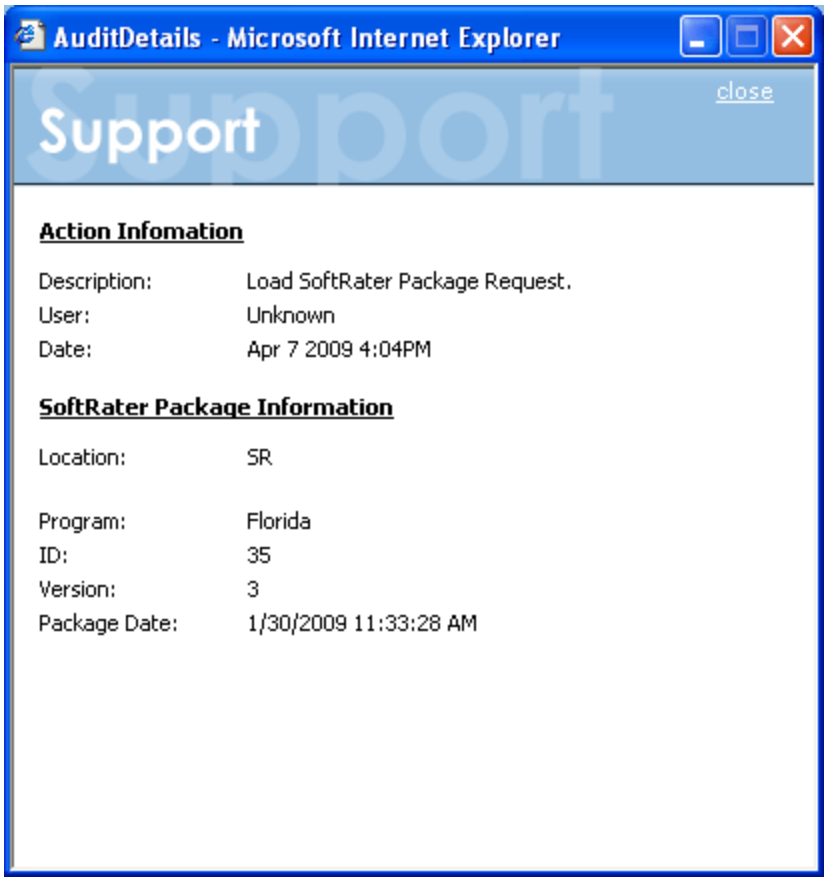


Figure 96 Viewing Audit Log Details

10

Security

The security section of the Framework Administrator allows an administrator to set the type of authentication that will be used to certify users and allow them to access to all sections of the Framework Administrator. If a user does not have full access, they will be allowed to see only the **Packages** tab of the SoftRater Explorer. Within the SoftRater Explorer, the user will only be able to manipulate packages that are not located in a secure environment. For more information, see the following sections:

- Changing the Type of Authentication Used
- Securing an Environment - see Adding/Deleting an Environment
- Changing the Password

Changing the Type of Authentication Used

The Framework Administrator allows you to set the type of authentication used. The available options are:

- **None:** All users will have access to all portions of the Framework Administrator.
- **Windows:** Users, and the areas of the Framework Administrator they can access, are validated by IIS. See Windows Authentication for more information.
- **Custom:** Users can log in through an HTML form. Users that are not logged in can only access non-secure environments. See Custom Authentication for more information.

To Change the Type of Authentication

1. Using the menu tree, click **Security**.

2. This will open the **Security** page.

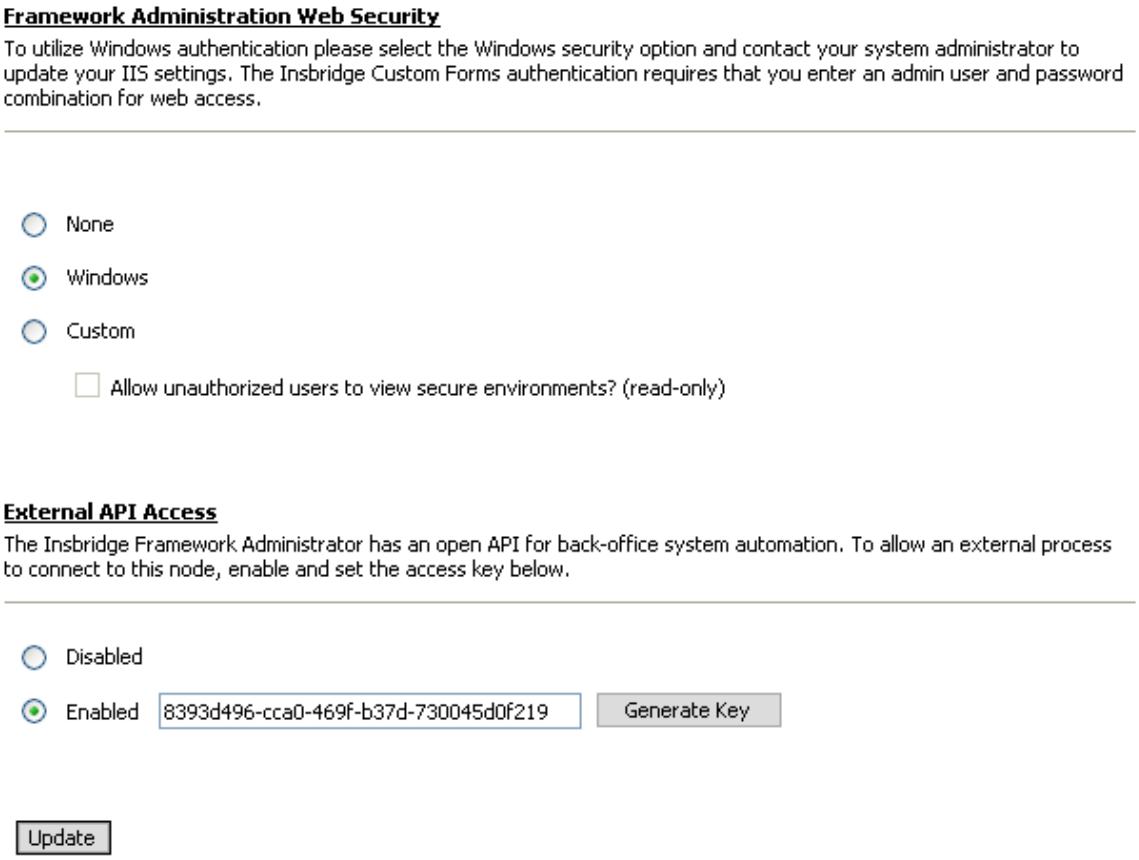


Figure 97 Insbridge Security Page

3. Select the radio button next to the type of authentication you want to use.
4. Click Update to save your changes. The next time a user attempts to access the Framework Administrator, the type of authentication you selected will be used to validate their credentials.

Windows Authentication

This option relies on Microsoft Internet Information Services (IIS) to provide authenticated users. All methods supported by IIS are permitted.

When using IIS, the provider module uses the authenticated identity passed in from IIS. IIS authenticates the identity using basic, digest, integrated Windows authentication or some combination of these. You can use impersonation and NTFS ACL permissions to restrict or allow access to protected resources.

For more information on IIS, see the Internet Information Services Home Page.

Custom Authentication

This option collects a user's credentials through a login screen. The user enters a user ID and password and then submits the HTML form. If the application authenticates the request, the system issues a cookie that contains the credentials, key, for reacquiring the identity. Subsequent requests are issued with the cookie in the request headers. The requests are authenticated and authorized by an ASP.NET event handler, using whatever validation method the application specifies. The system also allows the administrator to change or reset the password that is encrypted on disk.

When custom authentication is used, users will initially only see the SoftRater Explorer page.

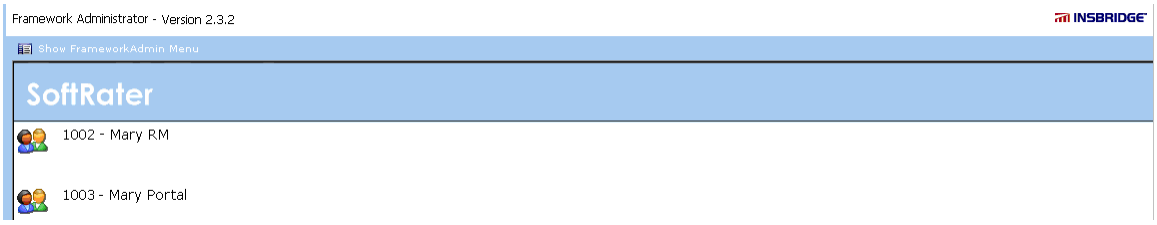


Figure 98 SoftRater Explorer

If a user wants to navigate to the **Packages** tab of the SoftRater Explorer, they can click the carrier's name (in this case, **Mary RM**).

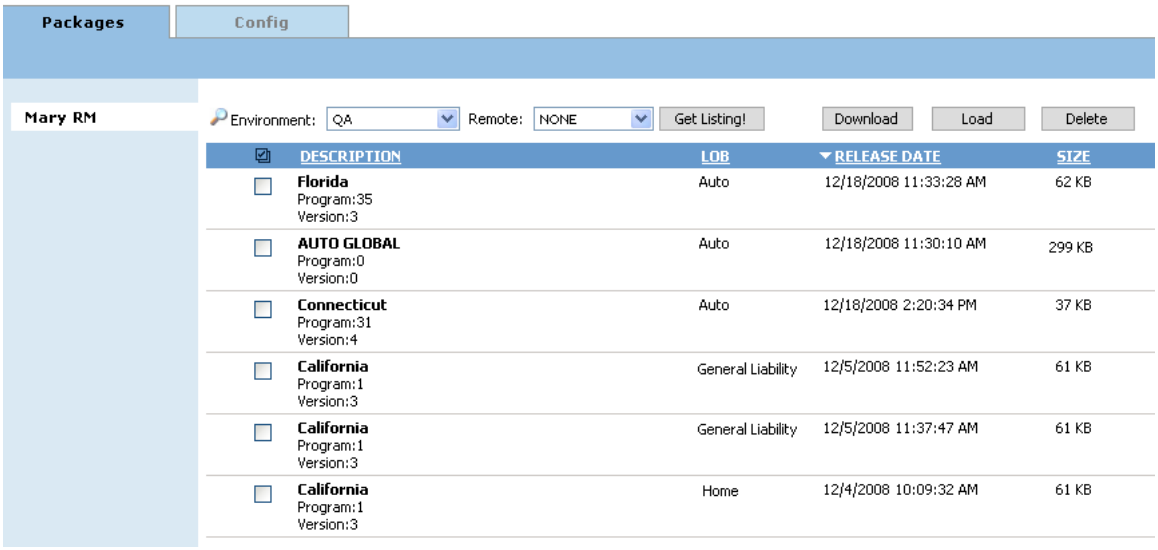


Figure 99 Packages Tab of SoftRater

The user only will be allowed to see and manipulate packages that are in non-secure environments.

To have full access to the Framework Administrator, a user must log in. To do this, click Show FrameworkAdmin Menu located in the upper left corner of the page. A sign-in form will open in the left frame where the user can enter a user ID and password.

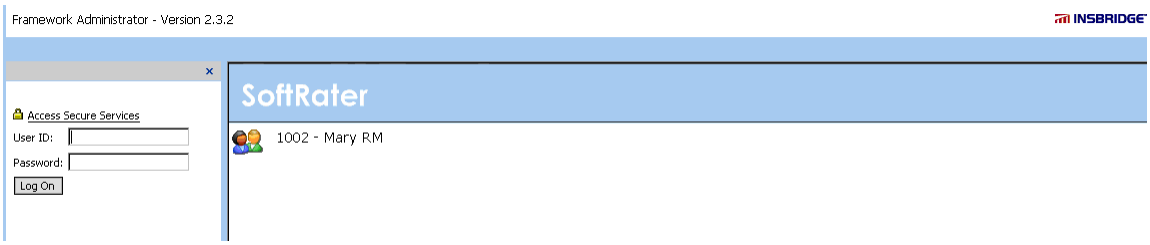


Figure 100 Logging into Framework Administrator

User ID, Default Password, Resetting the Password

For security purposes, information regarding the user ID, default password and resetting the password is not included in this help document. For information regarding these, please log a Service Request using My Oracle Support at http://metalink.oracle.com.

External API Access

Oracle Insurance Insbridge Rating and Underwriting Extended Services Interface (ESI) is a library module designed to provide remote services to the Insbridge Rating and Underwriting (IBRU) business services without directly utilizing the system User Interfaces (UI).

ESI allows users to pass information between a user's source policy or business admin system and the RateManager system or the Insbridge Framework Administrator (IBFA) without using either the RateManager or IBFA UI. Information is passed through a custom built interface that resides on a source policy or business admin system on the client side to the ESI web service that resides on the IBRU side. The information is processed and results returned from the ESI web service back to the custom built interface into the client's source policy or business admin system.

ESI is designed to operate on Insbridge version 3.11 and higher and will connect with:

- Oracle Insurance IBRU RateManager Interface
- Oracle Insurance Framework Administrator Interface

To use ESI's IBFA Framework functionality, you need to send down the API key when you do the ESI API call.

When IBFA is installed, a default API key will be generated and saved in IBFA. You can find it in *IBFA➢Insbridge➢Security➢External API Access*.

You can disable ESI's IBFA functionality by setting it to **Disabled**.

For security purpose, you may want to change the key once in a while. To change the key, click on **Generate Key** and then click on **Update**. Every key generated will be unique.

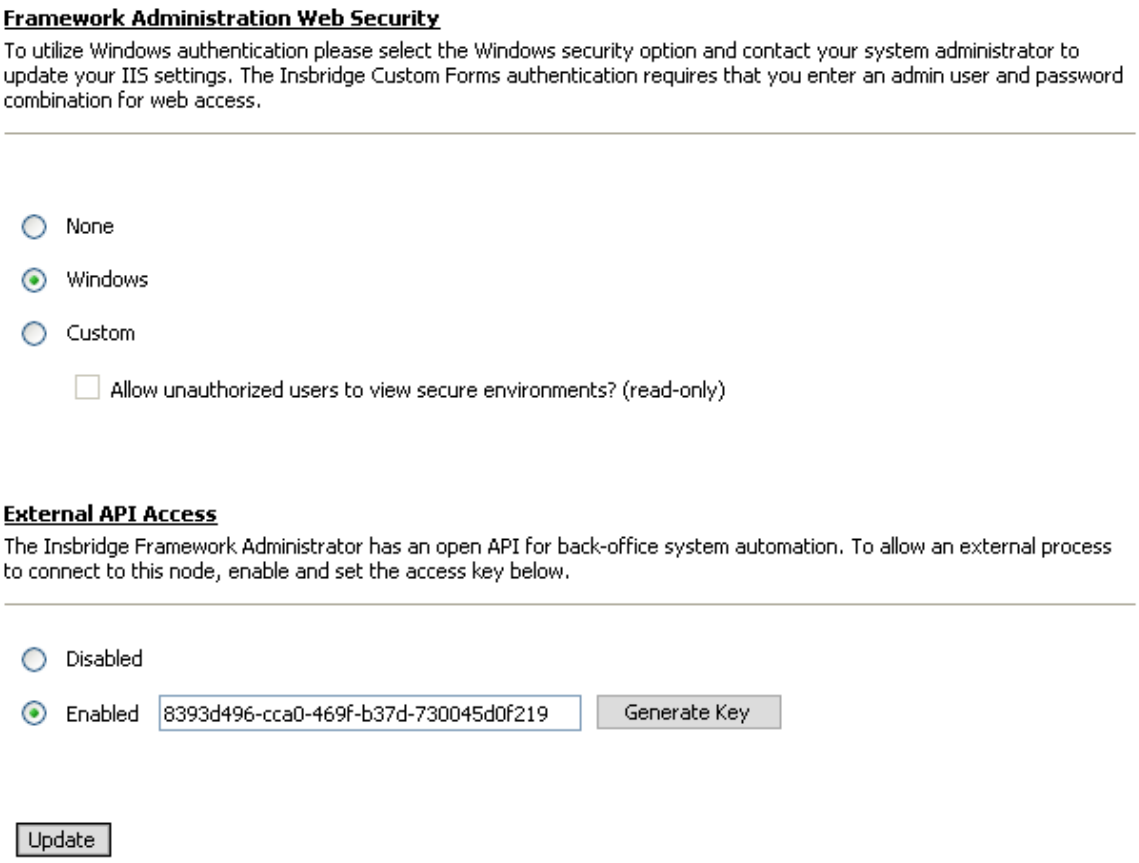


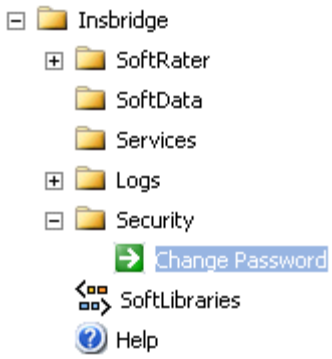
Figure 101 Allowing External API Access

Changing the Password

You can change the password used for **Custom** authentication at anytime. This password is only utilized when the authentication type has been set to **Custom**. For information on resetting the password, please log a Service Request using My Oracle Support at http://metalink.oracle.com.

To Change the Password

1. Using the menu tree, click the plus box (⊞) next to **Security** to expand it and then click **Change Password**.



2. This will open the **Change Password** page.

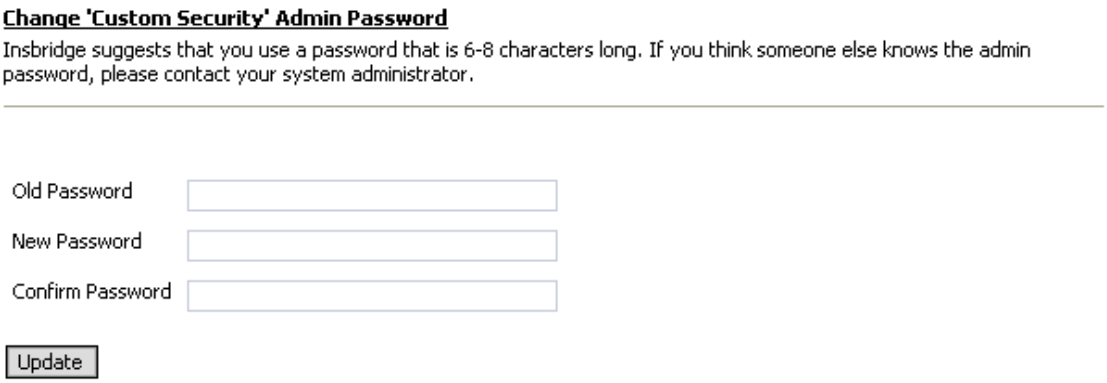


Figure 102 Changing your Password

3. Enter your current password in the **Old Password** box and enter your new password in the **New Password** and **Confirm Password** boxes. As you type, the text will be shown as asterisks (*) or bullets (•), depending on your browser.

4. When you are finished, click Update to update your password. The next time a user tries to log in to the Framework Administrator, they will need to use the new password.

11

SoftLibraries

The SoftLibraries section of the Framework Administrator allows an administrator to add, edit or delete external SoftLibraries. SoftLibraries will be available to all subscribers. SoftLibraries can be created by developers and stored either locally or remotely. Once added into IBFA, these SoftLibraries can be used by callout programs in RateManager. In SoftLibraries you can:

- **Add SoftLibraries**
- **Edit SoftLibraries**
- **Delete SoftLibraries**

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

Navigating to SoftLibraries

1. Using the menu tree, click **SoftLibraries**.

2. This will open the **SoftLibraries** main page.

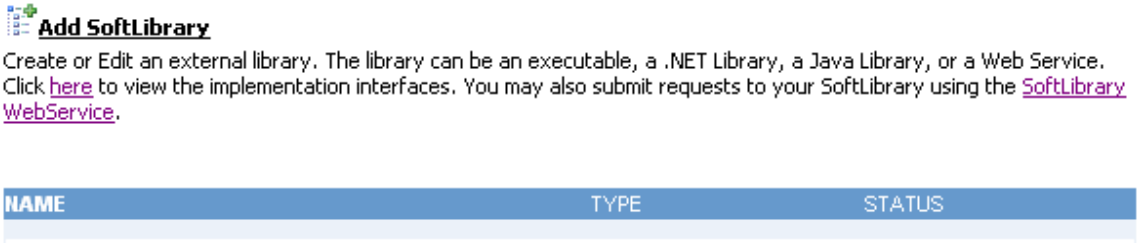


Figure 103 SoftLibrary Main Page

The main SoftLibraries page will display 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.

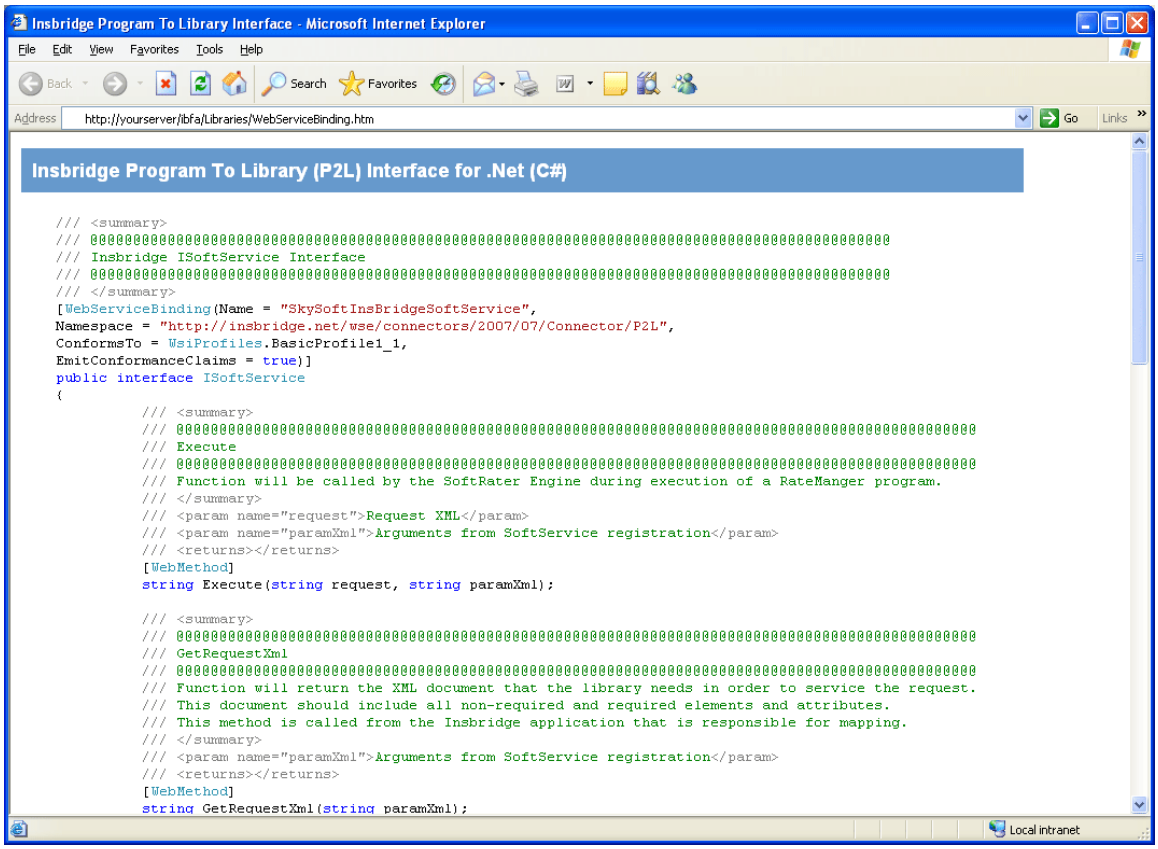
NOTE	The status determines whether or not a SoftLibrary is displayed in RateManager. If a SoftLibrary is disabled, it will not be displayed. If a SoftLibrary is active, it will be displayed.

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

Add SoftLibrary: This link will place you on the new SoftLibrary screen.

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.

Use SoftLibrary WebService link: Found on "You may also submit requests to your SoftLibrary using the SoftLibrary WebService." This pulls up a separate window that contains the Web Service Interface for SoftLibraries. This window can be left open while you work.


Insbridge Program To Library Interface - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://yourserver/ibfa/Libraries/WebServiceBinding.htm
Go Links
Insbridge Program To Library (P2L) Interface for .Net (C#)
/// <summary>
/// @@@@

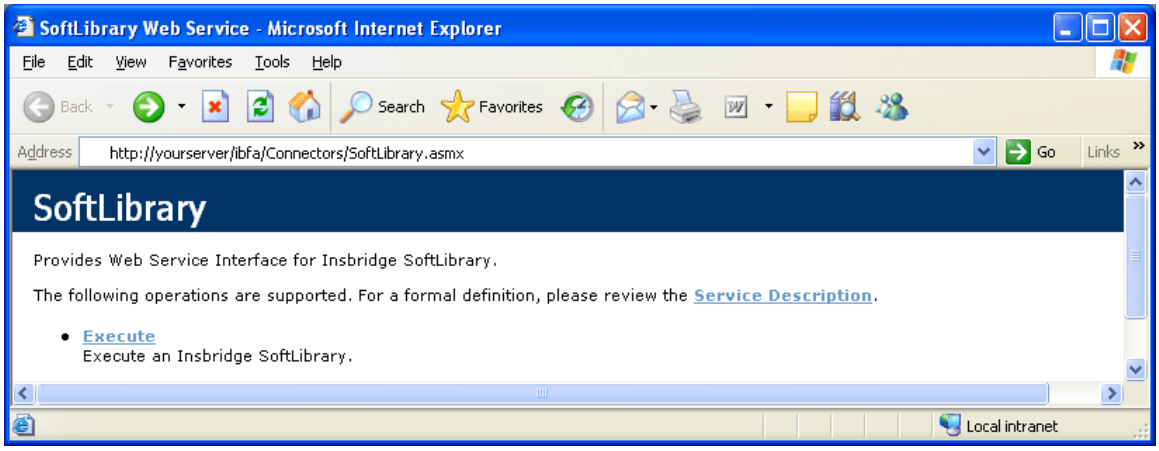


Figure 105 SoftLibrary Web Services

Adding SoftLibraries

1. Click the **Add SoftLibrary link** at the top of the screen. A separate window will be displayed.

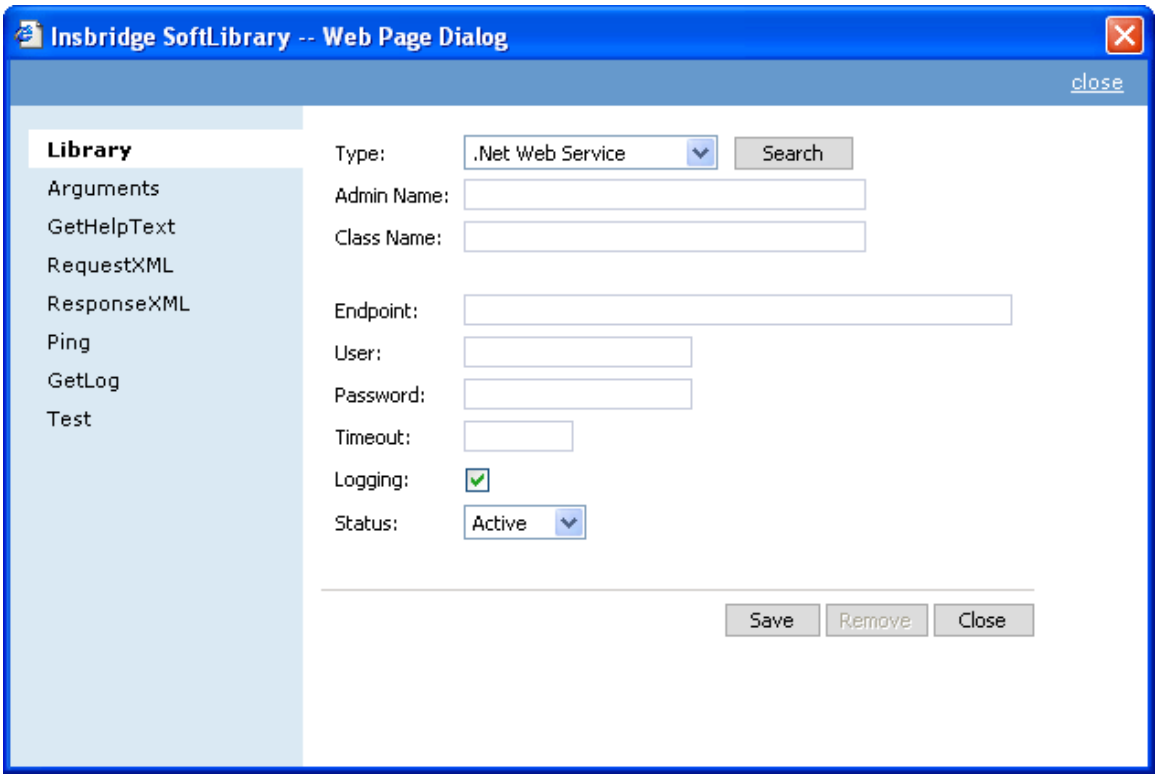


Figure 106 SoftLibrary Screen

The SoftLibrary screen will allow 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 the arguments for the SoftLibrary here.

GetHelpText: This is an information screen. If you want a quick view of the SoftLibrary, this screen 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 screen.

Response XML: The response XML will be displayed here. This will tell you exactly what you are getting back. This is an information only screen.

Ping: Will ping the server to verify server response.

GetLog: If logging is turned on, this screen will display logs.

Test: Allows you to test the SoftLibrary.

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

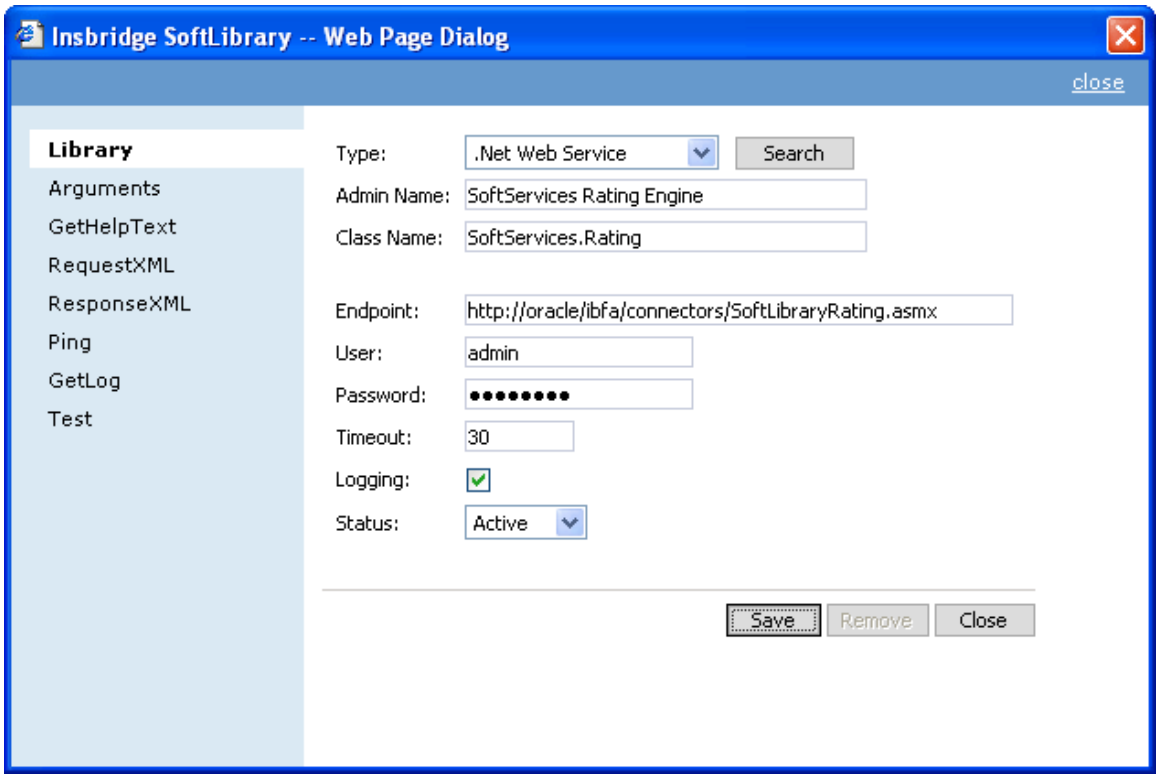


Figure 107 Completed SoftLibrary Screen

Type: The type of SoftLibrary you want to enter, either .NET Web Service, WebSphere or WebLogic. You can search for a SoftLibrary if necessary. See Searching for a SoftLibrary.

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 main 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.

Endpoint: The location of the Web Service. This information can be obtained from the developer. The endpoint is validated at Save. If this information is incorrect, timeout or other error messages may be thrown on the other screens.

User Name: Only required if the SoftLibrary must use a secure connection.

Password: Only required if the SoftLibrary must use a secure connection.

Timeout: The amount of time the SoftLibrary should wait for a response. Timeout is in milliseconds.

Logging: Check this box if you want logging. Leave it blank for no logging. The default is to have 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 active.

3. Enter in the **Library** information. Type, Admin Name, Class name and Endpoint are required.

4. Click **Save** to save your entries before you advance to the next screen.

5. Arguments must be entered next. Click the **Arguments** option on the side menu.

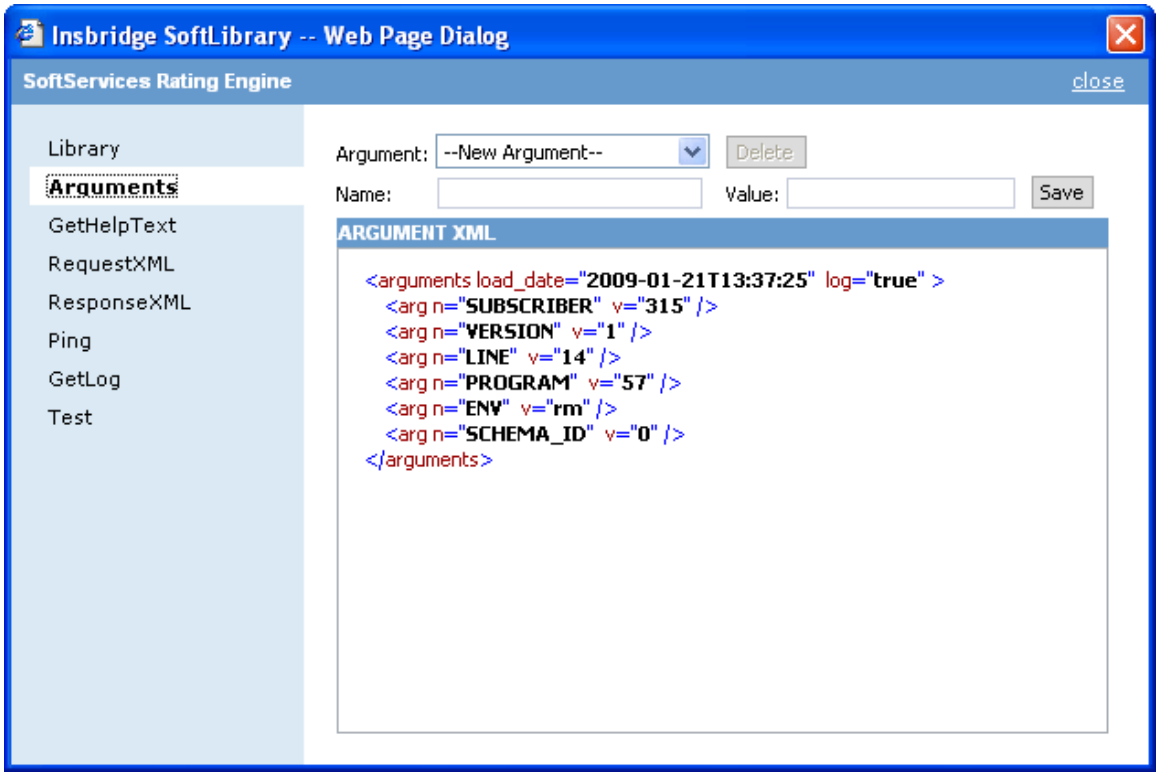


Figure 108 Arguments Screen

6. Select available **Arguments** 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.

Adding an Argument

To add 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.

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.

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

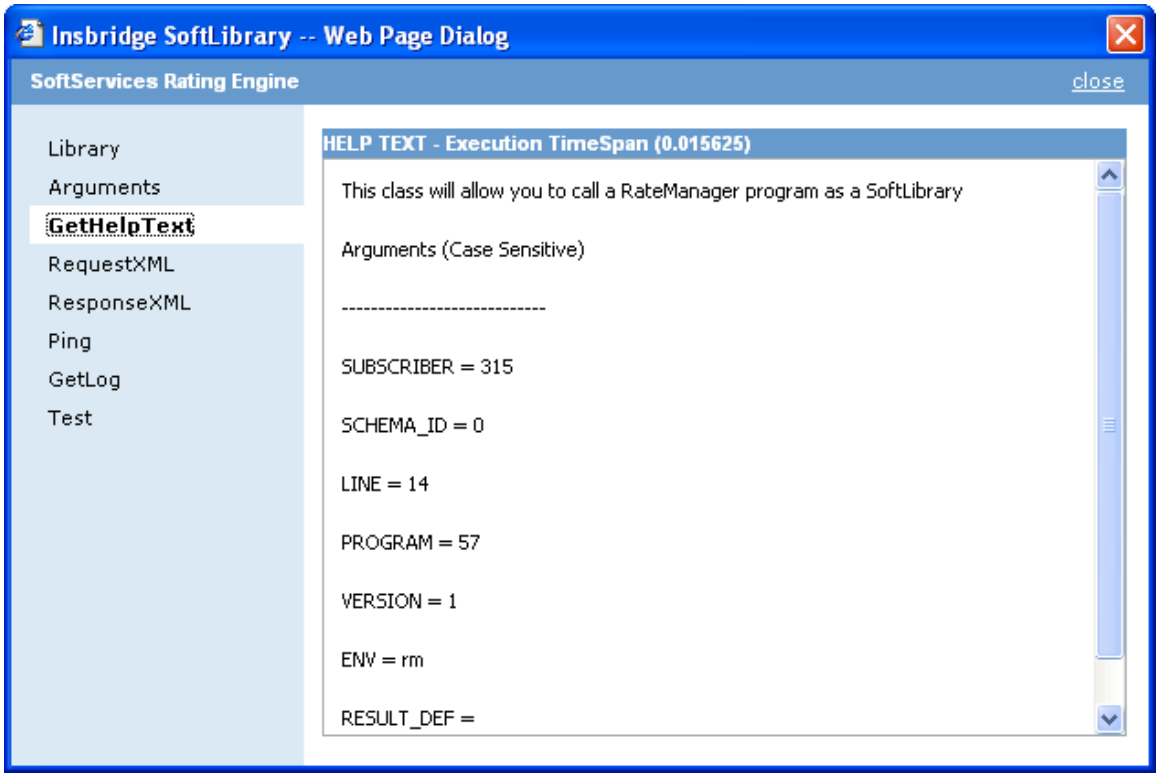


Figure 109 GetHelpText Screen

8. The next information screen is the **RequestXML** screen. This screen will display the request XML that is going out.

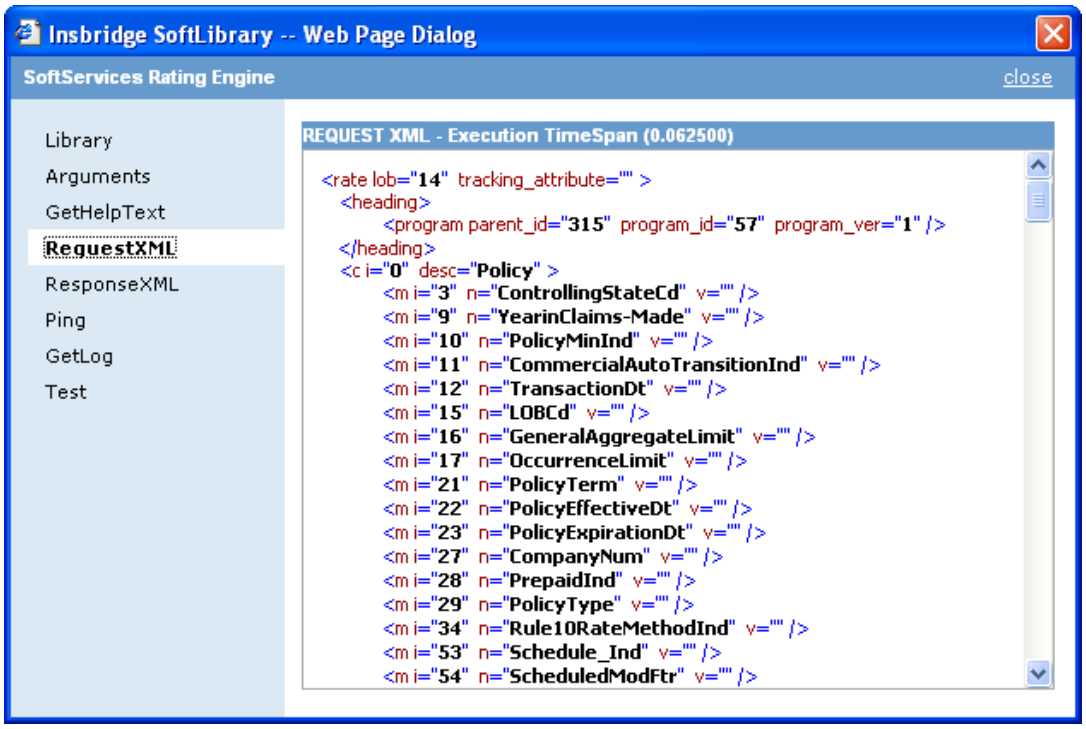


Figure 110 RequestXML Screen

9. The **ResponseXML** screen will tell you exactly what you are getting back.

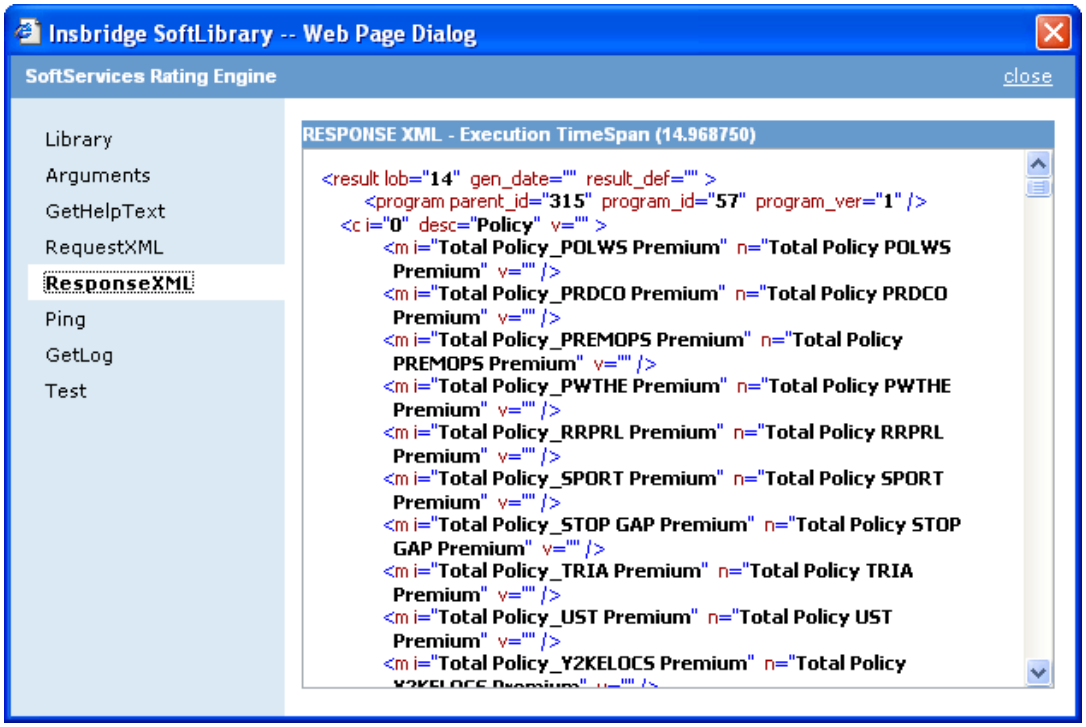


Figure 111 ResponseXML Screen

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

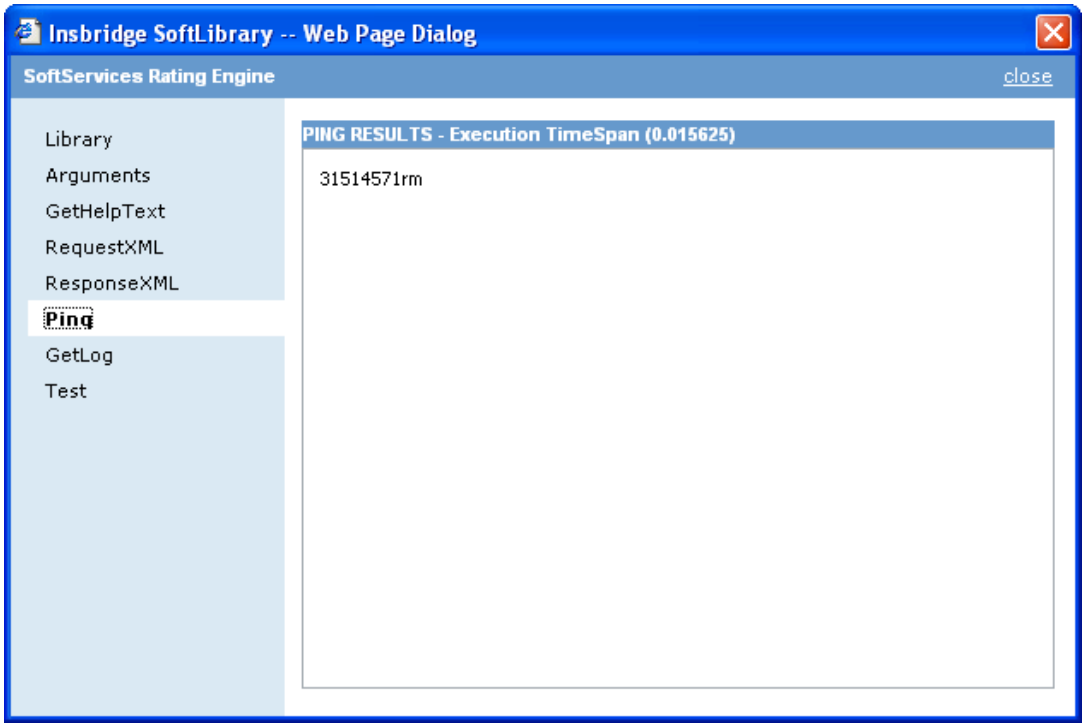


Figure 112 Ping Screen

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

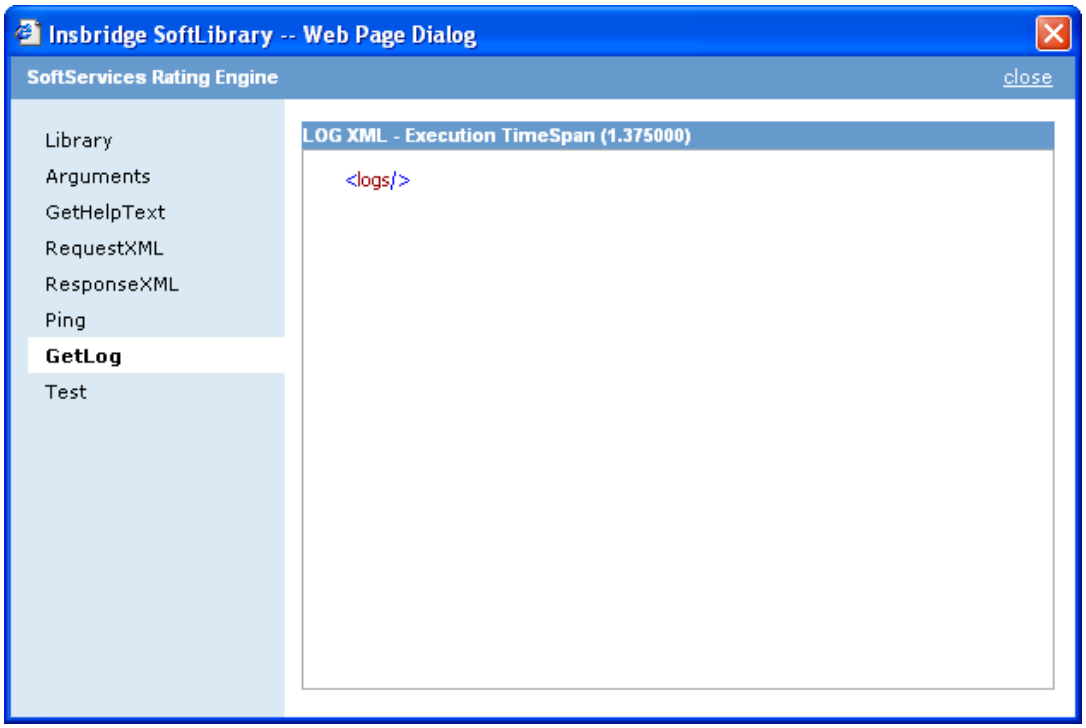


Figure 113 GetLog Screen

12. The last menu option is **Test**. Test has three parts. 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.

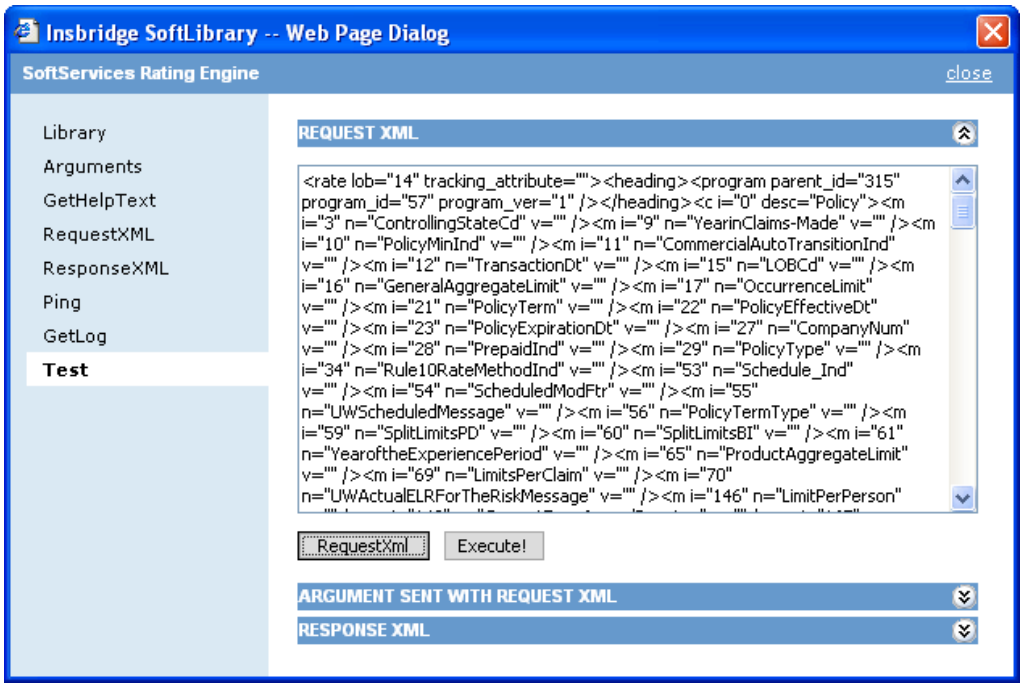


Figure 114 Test Screen – Request

13. 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 .

Figure 115 Test Screen – Response

14. After you have completed your SoftLibrary, return to the Library screen. If the save button is available, click **Save** to save your entries and then close the window. If the save button is grayed out, you can close the window.

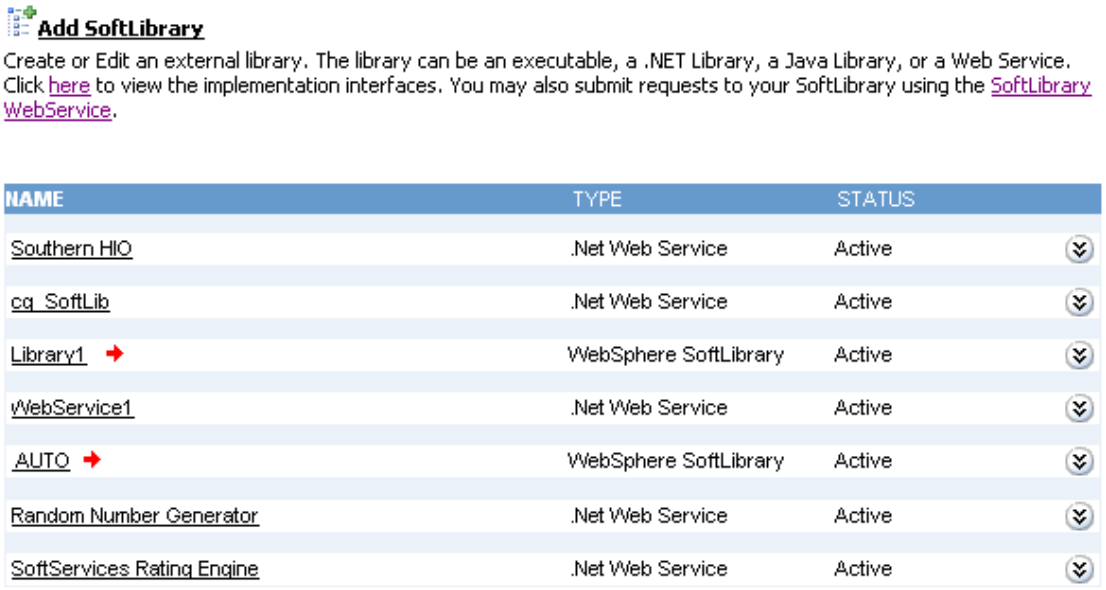


Figure 116 Completed SoftLibrary

NOTE

- Windows based SoftLibraries can be copied locally.
- WebSphere and WebLogic SoftLibraries are remote only.
- Remote SoftLibraries are indicated by a red arrow → next to the SoftLibrary name.

Editing SoftLibraries

Any SoftLibrary can be edited 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.

To edit a SoftLibrary, click on the name. The SoftLibrary screen 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 library here will affect any programs in RateManager that currently call this SoftLibrary without sending notice to users.

To delete a SoftLibrary, click the name. The SoftLibrary screen 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 screen.

Searching for a SoftLibrary

You can search for SoftLibrary types by clicking the search button next to the **Type** option. A separate window will be displayed. Enter in your **Server Name** and select the **Registration** type. Click **Search**. If the server is found, the SoftLibrary type will be listed in the Admin Name field.

Figure 117 SoftLibrary Type Search

12

Support

NOTE	If Oracle Insurance determines that a support request is related to consulting and/or programming services, such support is normally charged on a time and materials basis.

If you need assistance with an Oracle Insurance Insbridge Rating and Underwriting System product, please log a Service Request using My Oracle Support at http://metalink.oracle.com.

Address any additional inquiries to:

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

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

Glossary

A	
Administrator:	The person designated by your company who has the authority to create and change groups, usernames, passwords and restrictions.
Algorithm:	A sequence of steps used to perform a calculation.
Assigned Driver:	A driver who has been assigned to a vehicle.
Assigned Vehicle:	A vehicle that has been assigned a driver.
C	
Calculated Variable:	Calculated Variables are used when a result cannot best be derived from simple data mapping in a table. For example, if age is not passed as an input, but is a criteria needed in determining other factors, you would use a Calculated Variable to calculate driver age from the inputs of effective date and driver date of birth. Calculated Variables look at every node (driver, vehicle, location, etc.) independently and create a result for each. Once a calculated variable is created, the result can be used in any other variable.
Callouts	A set of a single or multiple programs and/or SoftLibraries that allows users to call needed operations at a specific time from either inside the system or outside the system.
Category:	A user defined group of information that defines inputs, variables, algorithms and the overall structure of the program.
Criteria:	An input or variable used in a mapped variable to determine which value to return. Any input or variable can be used as a criteria.
D	
Data Type:	The type of data associated with a parameter. RateManager supports three (decimal, integer and string) data types for variables and inputs and a fourth (date) for inputs and result variables only.
Date:	A data type supported for inputs and result variables only. For more information, see Dates in the Contents section.
Decimal:	A data type supported for all types of variables and inputs. Examples of decimal values are 3.1415, 18 and 0.995.
Default Value:	Used by a mapped variable if no match is found based on the criteria.
Dependency:	When copying a variable, algorithm or driver assignment, any element that requires another element to be present or defined will be listed. All dependencies must be resolved.
Driver Assignment:	Driver assignment is an auto insurance specific method of assigning a particular driver to a particular vehicle on a policy, based on certain criteria. Criteria often differ on a carrier basis, and sometimes even on a program level.
Driver Assignment Scenario:	A driver assignment scenario is a list of instructions that define the main sequence of operations to properly define the driver assignment logic for a carrier. A scenario is based upon the same algorithm principle used throughout the RateManager software.

E	
Export:	Exports allow users to export all elements of a program from one database to another database or within the same database. Or to export data in tab-delimited form, from a RateManager table to an outside location.
F	
Flag:	A variable that holds a 1 for true and a 0 for false.
Flag Driver Algorithm:	An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.
Flag Driver Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Driver Algorithm.
Flag Vehicle Algorithm:	An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.
Flag Vehicle Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Vehicle Algorithm.
G	
Global:	An input or variable that is available to all programs under a specific subline.
Global Input:	A value that is passed into the rating system.
Global Result:	A value that is passed out of the system after rating.
Group:	A set of users that have the same access rights.
I	
If:	A step type available for use in calculated variables and algorithms. For more information, see If in the contents section.
Import:	Import allows users to bring in programs from an outside location into RateManager. Or to import data in tab-delimited form, into a RateManager table.
Input:	A value that is passed into the rating system.
Integer:	A data type supported for all types of variables and inputs. Examples of integer values are 3, 1859865 and -47.
Interpolation:	An estimated value derived from two known values.
L	
Library:	The Library is where templates are stored and managed.
Linked Variables:	Two or more mapped variables that have been associated with one another because they use the same criteria.
Lock:	A lock will close all associated Variables, Algorithms, Driver Assignments, Sequencing and Result Mappings in a program version from deletions and edits.
M	
Mapped Variable:	A variable that uses other variables and inputs as criteria in determining the appropriate value. See Mapped Variables in the Contents section for more information.

Mask:	A feature that allows the customer to determine how data should be interpreted. See Masking in the Contents section for more information.
N	
Normal Rating Algorithm:	The most common type of algorithm. Examples of what it can be used for are: • Determine premiums • Calculate differences in limits being passed into the system vs. limits being rated by the system • Assign tiers
O	
Operator:	A built-in mathematical function used in calculations and comparisons.
P	
Package:	A small file that holds all the RateManager logic for a specific program and version.
Program:	A planned group of procedures executed in a specific order to return a rating. Programs in RateManager typically correspond to rate manuals. Programs can be either created by the users or imported.
Program Date Mask:	Specifies how SoftRater interprets dates being passed into an input file.
Program Folders:	A RateManager file management system that functions in much the same way as Microsoft Windows Explorer. This multi level setup allows for an unlimited number of program folders and subfolders to be placed underneath a subline.
R	
Rank Driver Algorithm:	An algorithm used by a Rank Driver Function to rate drivers based on certain criteria.
Rank Driver Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rank Driver Algorithm.
Rank Vehicle Algorithm:	An algorithm used by a Rank Vehicle Function to rate vehicles based on certain criteria.
Rank Vehicle Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rate Vehicle Algorithm.
Reconcile	A comparison feature that compares one program version against another version in the same program and generate a report of the differences.
Restrictions:	Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator.
Result Mapping:	A defined set of results, inputs and variables displayed in the output file.
Revision:	A variable specific type of versioning. See Versioning in the Contents section for more information.
S	
Sequence:	The order in which algorithms run. See Sequencing in the Contents section for more information.

SoftLibrary:	A SoftLibrary is a specially developed program that performs a specific task. SoftLibraries may run their own code or call upon other systems to obtain information outside of RateManager, for example, obtaining a credit score
Source:	The source is the creator of a template and will also be the name of the new subline.
String:	A data type supported for all types of variables and inputs. Examples of string values are "2.718", "The quick brown fox jumps over the lazy dog." and "001".
Subline:	Sublines are classifications that fall in between lines of business and program folders. Sublines allow for the separation of programs by source.
T	
Tab-delimited:	A type of text file in which columns are separated by tabs. This is the required format for importing tables into RateManager.
Template:	Templates are exact copies of existing programs within a line of business that can be from within your own user group, any other user group within the company or even from an outside company.
U	
Unassigned Driver:	A driver who has not been assigned to a vehicle.
Unassigned Vehicle:	A vehicle that has not been assigned a driver.
Underwriting Algorithm:	A type of algorithm used to determine if a policy meets the requirements of the company.
Universal:	A collection of programs from all lines of business combined with result group mappings and assigned to execute in sequence that returns a single or multiple results.
V	
Variable:	A name used to represent a value that can change. See Variables in the Contents section for more information.
Version:	One of a sequence of copies of a program, each incorporating new modifications. See Versioning in the Contents section for more information.
W	
Wildcard:	An option available for mapped variables that tells RateManager that one or more rows ignore the value passed in for the criteria. See Variables in the Contents section for more information.
Workflow:	A workflow is a type of program that allows you to call multiple programs from different lines of business together under one universal program.
Working Category:	A classification used to define how elements should run. See Categories in the Contents section for more information.
X	
XML ID:	A number automatically assigned by RateManager to identify inputs and categories.

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