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Insbridge Rating and Underwriting

Impact Analysis User Guide

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Oracle Insurance Insbridge Rating and Underwriting Impact Analysis User Guide

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Primary Authors: Mary Elizabeth Wiger

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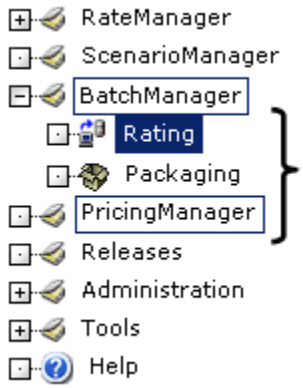
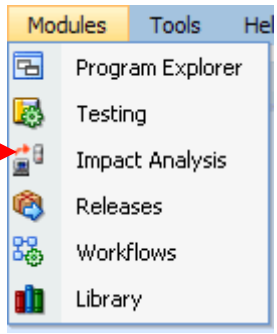
PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting Impact Analysis User Guide*. This guide describes the features and functionality of Oracle Insurance Insbridge Rating and Underwriting Impact Analysis (Impact Analysis). Impact Analysis is a new feature for Release 4.0 that combines two features from previous releases, BatchManager Rating and Pricing Manager.

Impact Analysis is a module in Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager) that serves as a data analysis tool and allows you to rate a group of policies in a batch rather than individually. With Impact Analysis, you can compare the effects of a program change against existing rates. You can compare two complete sets of data, such as a data set containing current rates and another data set containing a proposed rate change.

Impact Analysis is available from the Module **Menu**.

RateManager 3.13 and earlier	RateManager Release 4.0.1
	 **BatchManager (Batch Rating) has been combined with PricingManager and is now called Impact Analysis**. Impact Analysis is an option on the Modules menu.

NOTE: *BatchManager Packaging is located in Modules→Releases→Packaging.*

AUDIENCE

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

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Rating and Underwriting RateManager User Guide.
- The Oracle Insurance Insbridge Rating and Underwriting Framework Administrator User Guide.
- You can view these guides on-line at this address:

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

CONVENTIONS

The following text conventions are used in this document:

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

SYSTEM REQUIREMENTS

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

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-730-15	R 4.0	April 2010	
2nd Edition	P01-730-16	R 4.0.1	August 2010	

Chapter 1

INTRODUCTION TO IMPACT ANALYSIS

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

Impact Analysis contains two *sub-tabs*:

- **Batch Files** – This sub-tab can rate multiple XML files at one time either as a combined single file or as a group of XML files bundled together under one folder. The result files can then be used in the Reporting sub-tab.
- **Reporting** – This sub-tab is where you can compare two complete sets of data, such as a data set containing current rates and another containing a proposed rate change.

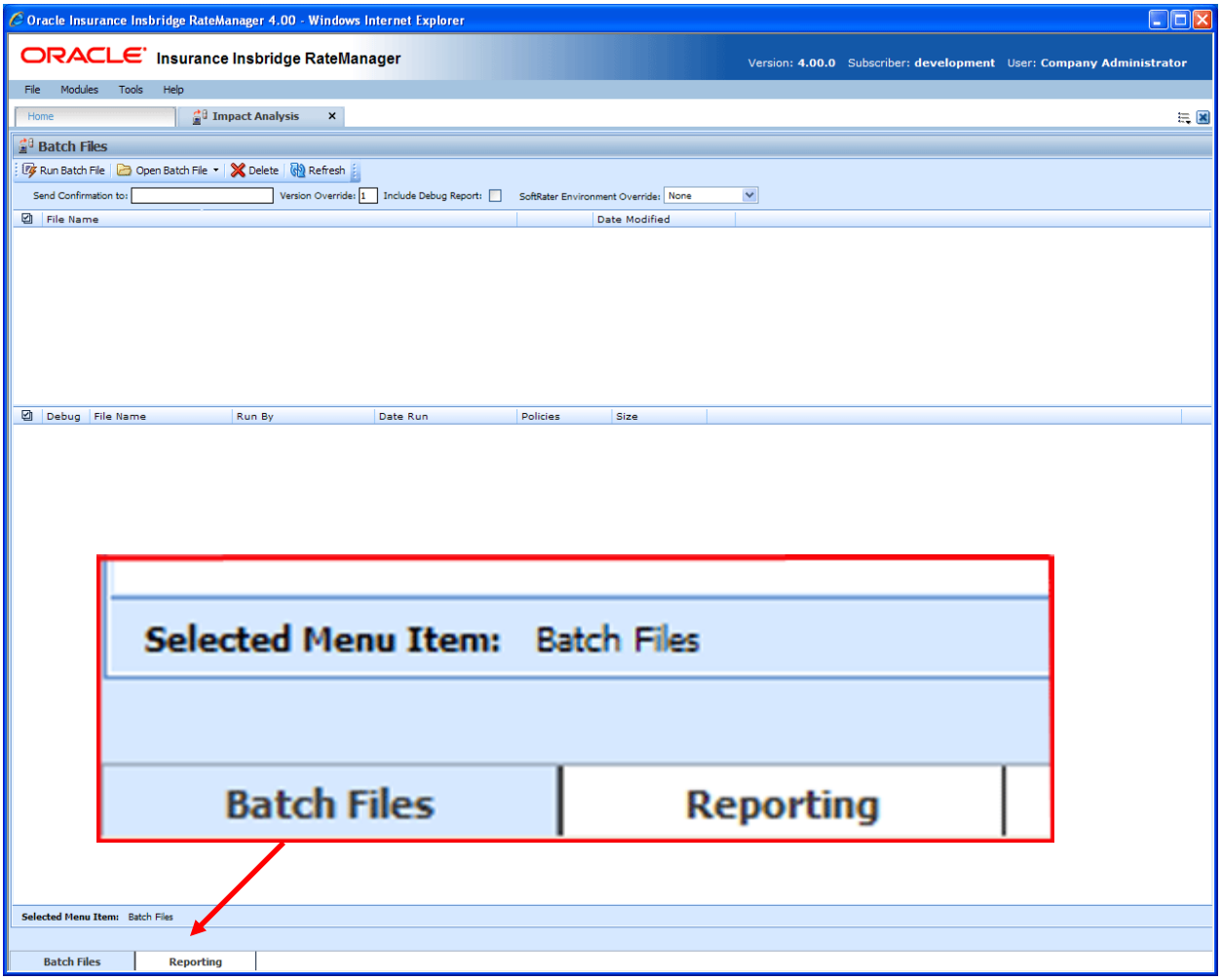


Figure 1 Impact Analysis Tab

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

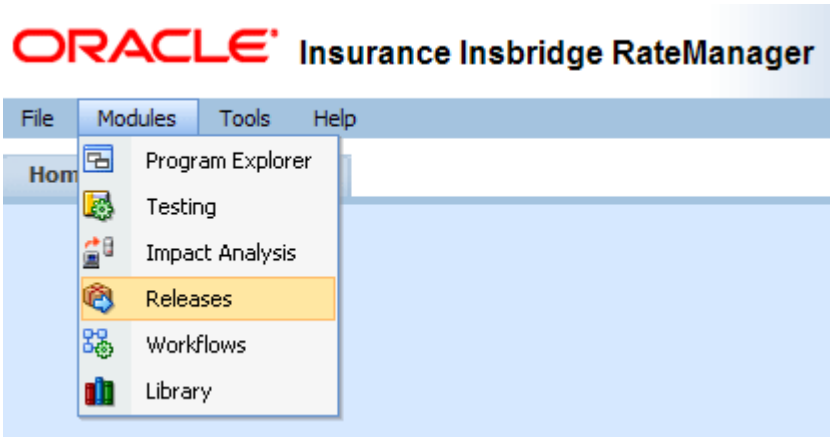
PREPARATION

Batch files are required when working with Impact Analysis.

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

Batch Packaging Location

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



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

For more information on working with batch packaging, please see *Releases* in the *RateManager User Guide*.

Preparing a Batch Input File

Batch Files can rate multiple XML files at one time either as a combined single file or as a group of XML files bundled together under one folder. The result files can then be used on the Reporting sub-tab. The first step is to create a batch input file or folder.

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

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

Batch Input Files

There are two types of batch input files:

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

Individual File

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

An example single batch XML input file is shown in Figure 2, (<ibdoc> is used as the XML wrapper):

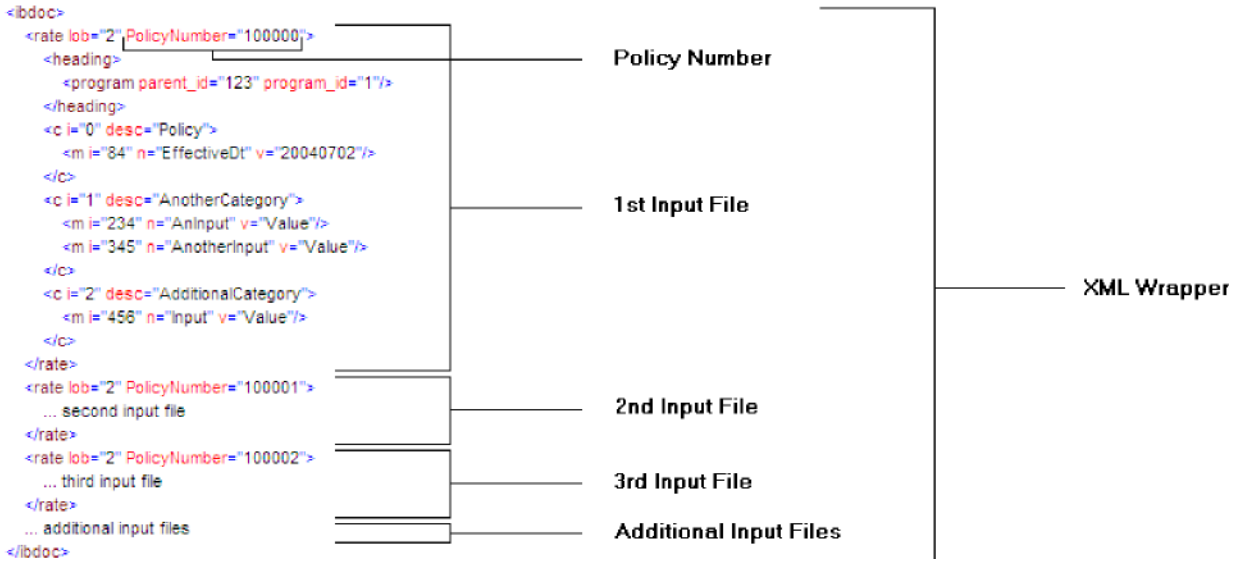


Figure 2 Example of a Batch XML File

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

Group Folders

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

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

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

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

NOTE: *In IE 8, you can no longer edit the directory path to use an asterisk if you want to rate a group of files in directory. An option has been added to the Open Batch File Dialog window to "Rate all files in this directory". Browse to the directory where you have the multiple files you want to rate. Select one file and then select the "Rate all files in this directory" option. The file path will be modified, replacing the file name with an asterisk.*

Result Mapping in Batch Files

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

NOTE: *When using custom XML in Impact Analysis and Releases→Packaging, you must map the System Category – rate and category input pricing_manager_policy_id. This input requires a unique policy identifier and is used in the batch and rating process. Please see the Oracle Insurance Insbridge Rating and Underwriting RateManager User Guide, Input and Output Mapping for more information.*

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

Batch Results with New Line

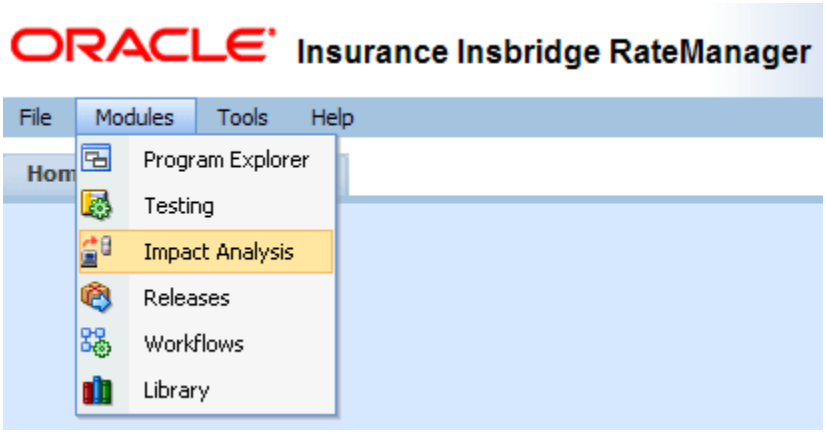
In Batch Files, the results are set to form one continuous string. If you want to add a break between results, you must go to RateManager.

To set Batch Results with a New Line enter RateManager and go to Tools. On the Preferences page (Tools→Preferences) will be the option to set Batch Results with a New Line. If the "Batch Results with a New Line" setting is set to true, batch results will go to a new line instead of forming one continuous

string. A True setting places a carriage return between result files. A False setting will result in one continuous string without a break. Please see the RateManager User Guide for more information.

To Navigate to Impact Analysis

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



2. This will open the Impact Analysis→**Batch Files** sub-tab. To go the Reporting, click the **Reporting** sub-tab.

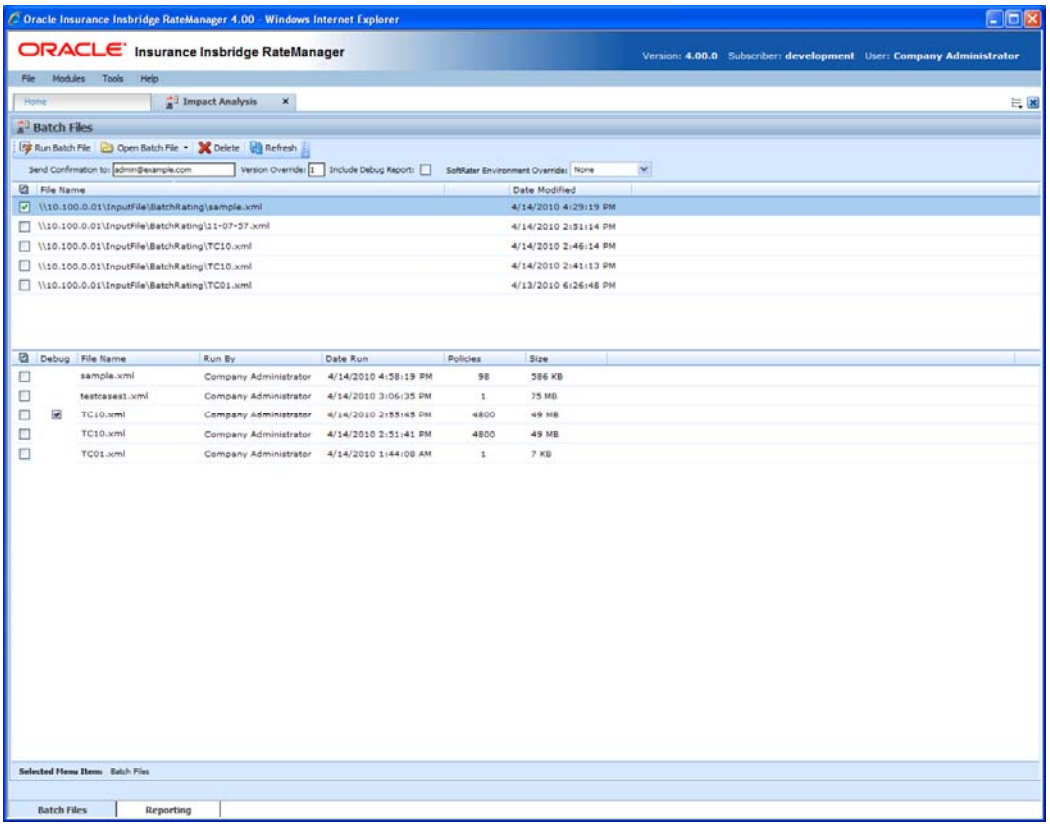


Figure 3 Impact Analysis Batch File

Chapter 2

BATCH FILES

The first sub-tab is Batch Files. Batch Files is where you will perform batch rating. Batch rating is used to rate multiple XML files at one time. Rates are returned in a result report. Result reports can be displayed in XML format or report format and can contain debug information if needed.

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

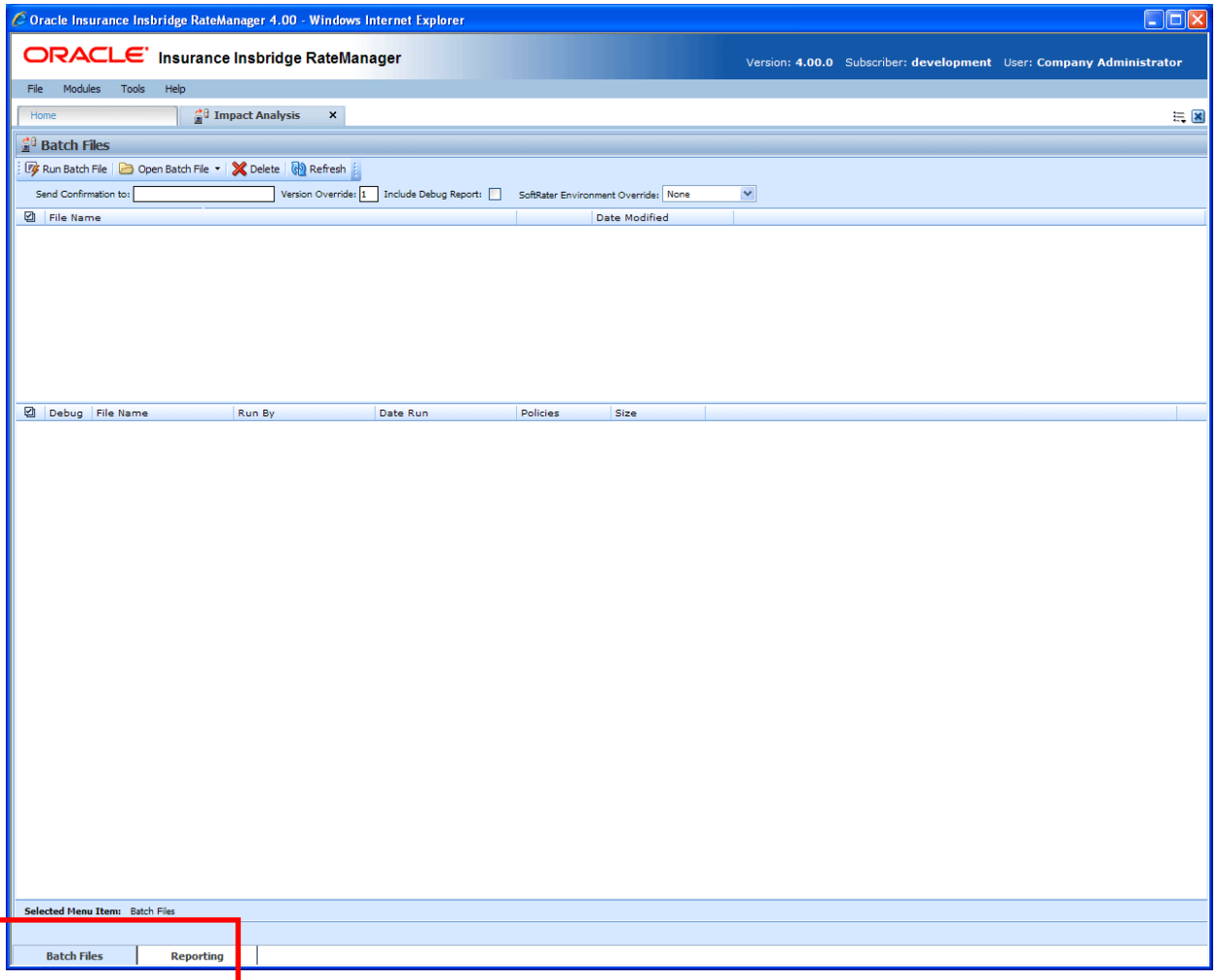
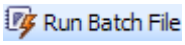
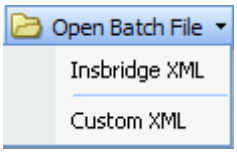
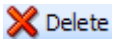
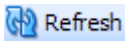


Figure 4 Batch Files Sub-Tab

FUNCTIONALITY

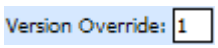
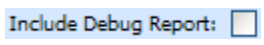
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

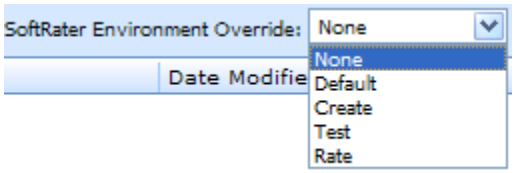
Functions:

	**Run Batch File:** Rates an existing/displayed input file. To use, place a check in the box next to the File Name and select this option. **NOTE:** *You can also rate an existing/displayed input file by double clicking it.*
	**Open Batch File:** Opens a browser window where you can select an input file to rate. There are two options: • **Insbridge XML** – Opens a browser window where you can select a file that is in Insbridge.XML format. • **Custom XML** – Opens a browser window where you can select a custom input file to rate. A separate screen will be displayed that allows you to define the file parameters and specify the mapping to use that will transform the input file into an Insbridge.XML format.
	**Delete:** Removes the selected file(s). **NOTE:** *For input files, this does not delete the actual XML file.*
	**Refresh:** Refreshes the listing of input and result files.

Definition Options:

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

	Send Confirmation to: Provides a place where you can enter an email address that will receive notification when the rating is complete. **This is a required field**.
	**Version Override:** If you want to override the version of the program that would normally be rated, enter the version number in this box. If you want to use the version specified in the input file (or determined by automatic version selection), clear this box.
	**Include Debug Report:** Checking this option sends the batch rate through debug. You must check this prior to rating a batch file. Debug files are local to the Batch Rating sub-tab. If you want to use a batch file on the Reporting sub-tab, do not select to debug the file.

	NOTE: *Batch files that are run with the debug option will not be available for use by the Reporting sub-tab.*
	**SoftRater Environment Override:** Choose this option if you want to override the rating environment. • **None** – no override will be in place. You also can use this option when you want to use the defined environment in your ratings. • **Default** – selects the default environment. • **Another Environment** – if other environments have been entered, you may select one of those. **NOTE:** *If you select Default or another environment, any defined environments in your ratings will be ignored*.

FIELDS

The fields on the tab are divided over two areas:

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

XML Input File Listing

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

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

File Name: Displays the pathway of the input file.

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

Result File Listing

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

Check Box: Used to select multiple files to delete.

Debug: A checkmark indicates the result file is a full debug report. This report will not be listed on the Reporting sub-tab.

File Name: The name of the result file.

Run By: The user that rated the file.

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

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

Size: The size of the result file.

Right Click Options

Every File Name line will have right click menu options. To view the right click menu options, select the line you want and right click.

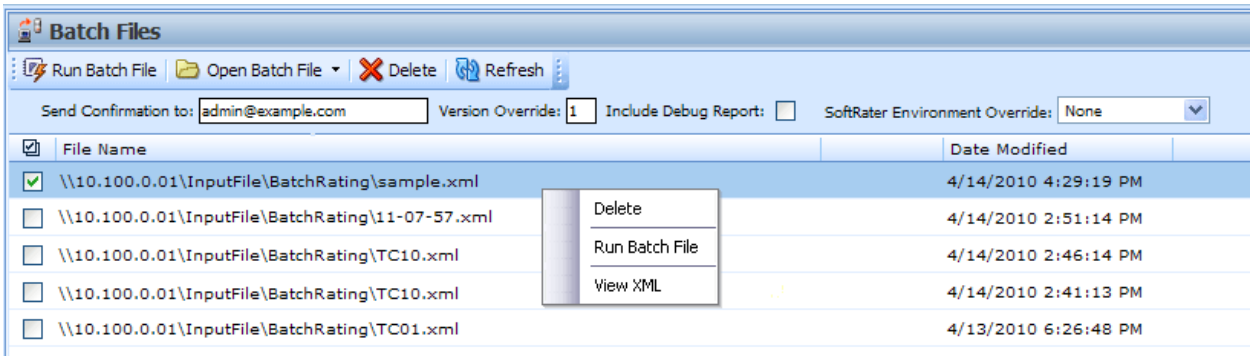


Figure 5 Right Click Menu for the XML Input File Listing

The **XML Input File Listing** will have three choices:

- **Delete:** Removes the selected file.
- **Run Batch File:** Rates the selected file.
- **View XML:** Allows you to view the selected XML file.

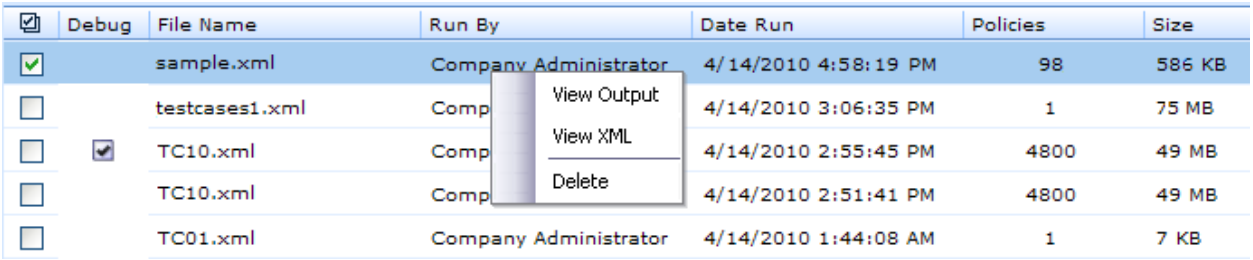


Figure 6 Right Click Menu for Result File Listing

The **Result File Listing** will have three choices:

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

Rating an Insbridge XML Batch File

1. Enter an email address into the **Send Confirmation to** text box. When the batch file is finished rating, an email will be sent to this address. A batch file cannot be rated without an email address.
2. To override the version of the program that would normally be rated, enter the version number in the **Version Override** box. To use the version specified in the input file (or determined by automatic version selection), clear this box.
3. If you want to debug this batch, check the **Debug Rate** box.
4. If you want to override the SoftRater rating environment, choose the environment you want from the listing.
5. If the file to be rated is already listed in the input file listing, it can be rated by selecting it and clicking **RUN BATCH FILE** or by double-clicking the file.
6. If the file to be rated in not listed, click **OPEN BATCH FILE** and select **INSBRIDGE XML**. A browse box will open for you to select the file to rate.

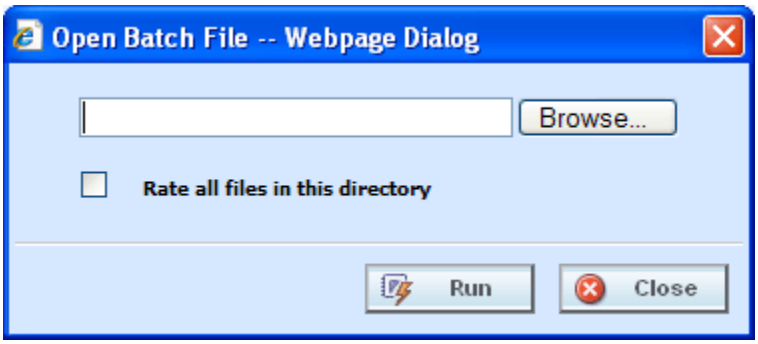


Figure 7 Entering a Batch File Name

NOTE: *In IE 8, you can no longer edit the directory path to use an asterisk if you want to rate a group of files in directory. An option has been added to the Open Batch File Dialog window to "Rate all files in this directory". Browse to the directory where you have the multiple files you want to rate. Select one file to rate and then select the "Rate all files in this directory" option. The file path will be modified, replacing the file name with an asterisk.*

7. If you know the path to the input file, you can type it in; otherwise, click **Browse…** to find a file to rate. When you are finished, click **RUN**.
8. A popup message will notify you that your request has been submitted for processing. If a different message is received.

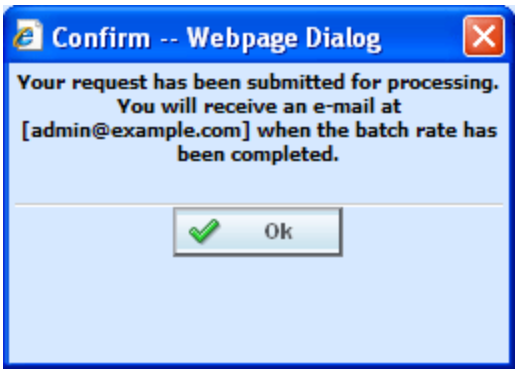


Figure 8 Confirmation Message for Batch Rate Request

8. You will receive an email when the file is finished rating. The result file can now be used in an Impact Analysis scenario or the result XML can be viewed by double-clicking the result file.

Rating a Custom XML Batch File

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

1. Enter an email address into the **Send Confirmation to** text box. When the batch file is finished rating, an email will be sent to this address. A batch file cannot be rated without an email address.

2. Leave the **Version Override** box blank. You will select the version to use in the batch file details.

3. If you want to debug this batch, check the **Debug Rate** box.

4. Leave the **SoftRater Environment Override** to **NONE**.

5. If the file to be rated is already listed in the input file listing, it can be rated by selecting it and clicking **RUN BATCH FILE** or by double-clicking the file.

6. If the file to be rated in not listed, click **OPEN BATCH FILE** and select **CUSTOM XML**. A browse box will open for you to select the file to rate.

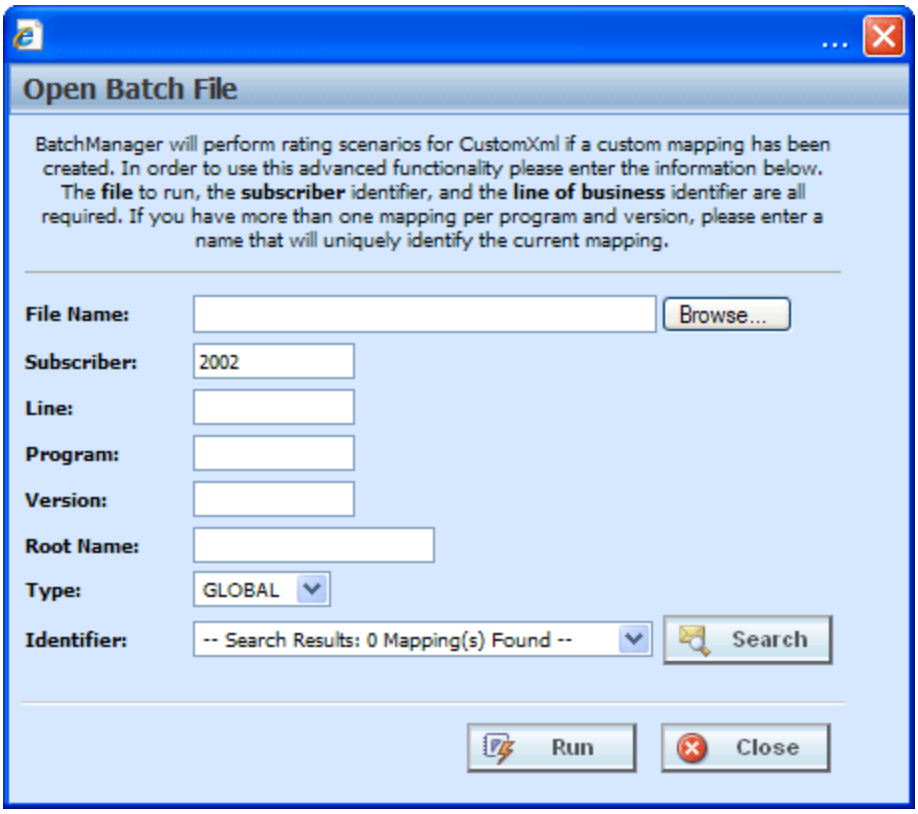


Figure 9 New Rate Custom Batch File Dialogue Box

7. If you know the path to the file you want to rate, type it in the box, otherwise, click **Browse…** to find a file to rate.

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

8. Enter in the **Line**, **Program** and **Version** numbers. The Subscriber number will default to your current number.

9. Enter in the **Root Name**. This is the element name that delineates each quote. Do not include the element brackets. If no entry is made, no files will be returned. In Figure 10, **Quote** is the element that marks the beginning and end of each quote.

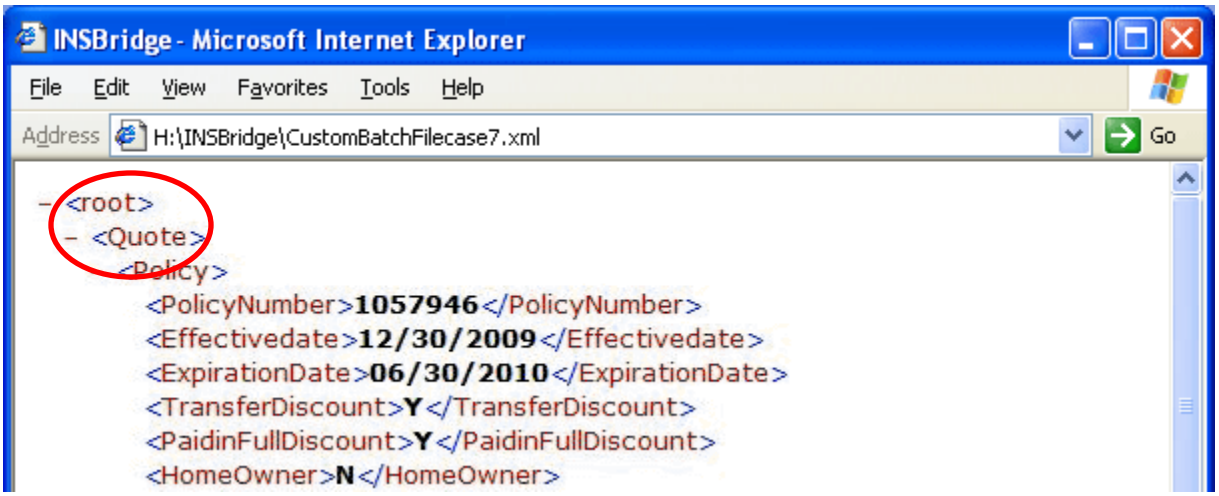


Figure 10 Example Custom Batch File

10. Select the input mapping **Type**. There are three options; Global, Local and Custom. Global uses XSLT created for the line (all inputs for the line), local uses XSLT created for a specific version (only inputs used by a specific version) and custom uses a custom XSLT created outside of the RateManager mapping tool.

11. Any mapping needed to transform the input file into Insbridge.XML format will be in the **Identifier** field. Select the Identifier to be used for this rating. The options will be filled in after you select the File Name at the top of the popup. You also can use **Search** to find the file you need.

12. When you are finished, click **RUN**. Your file will be rated and the result file will show in the result file listing.

13. A popup message will notify you that your request has been submitted for processing. If a different message is received, see Batch Error Messages.

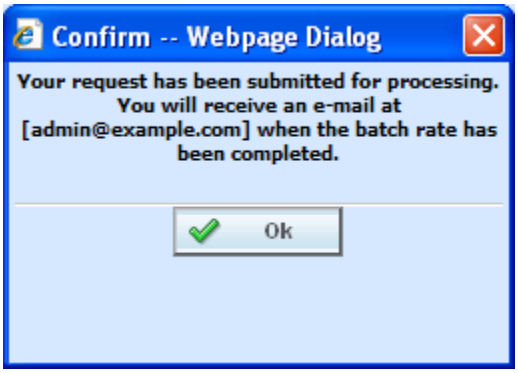


Figure 11 Confirmation Message for Batch Rate Request

14. You will receive an email when the file is finished rating. The result file can now be used in an Impact Analysis scenario or the result XML can be viewed by double-clicking the result file.

Deleting a Batch File

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

To Delete an Input File

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

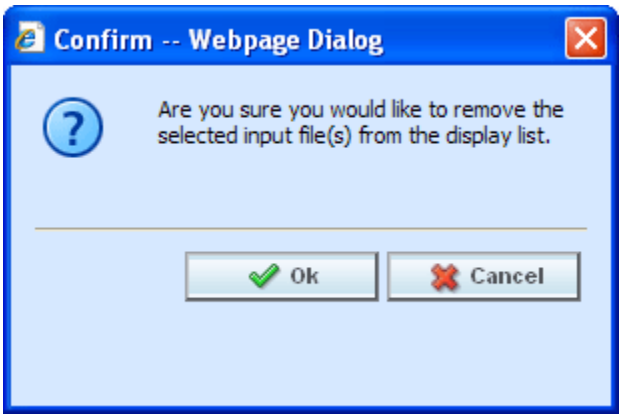


Figure 12 Delete Input File Message

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

Batch Error Messages

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

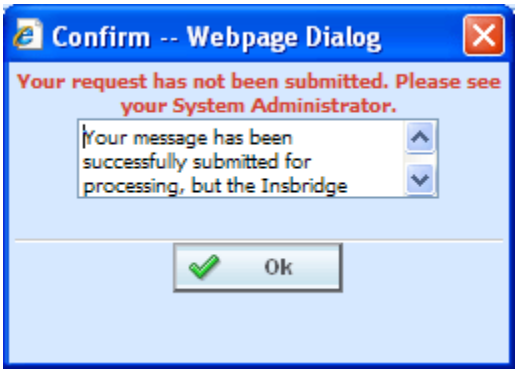


Figure 13 Error Message for Batch Rate

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

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

REPORTING

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

- Reports will be listed in the Scenario Listing area after they have been created.
- Reports will be listed in the Scenario Reports Listing after they have been run.

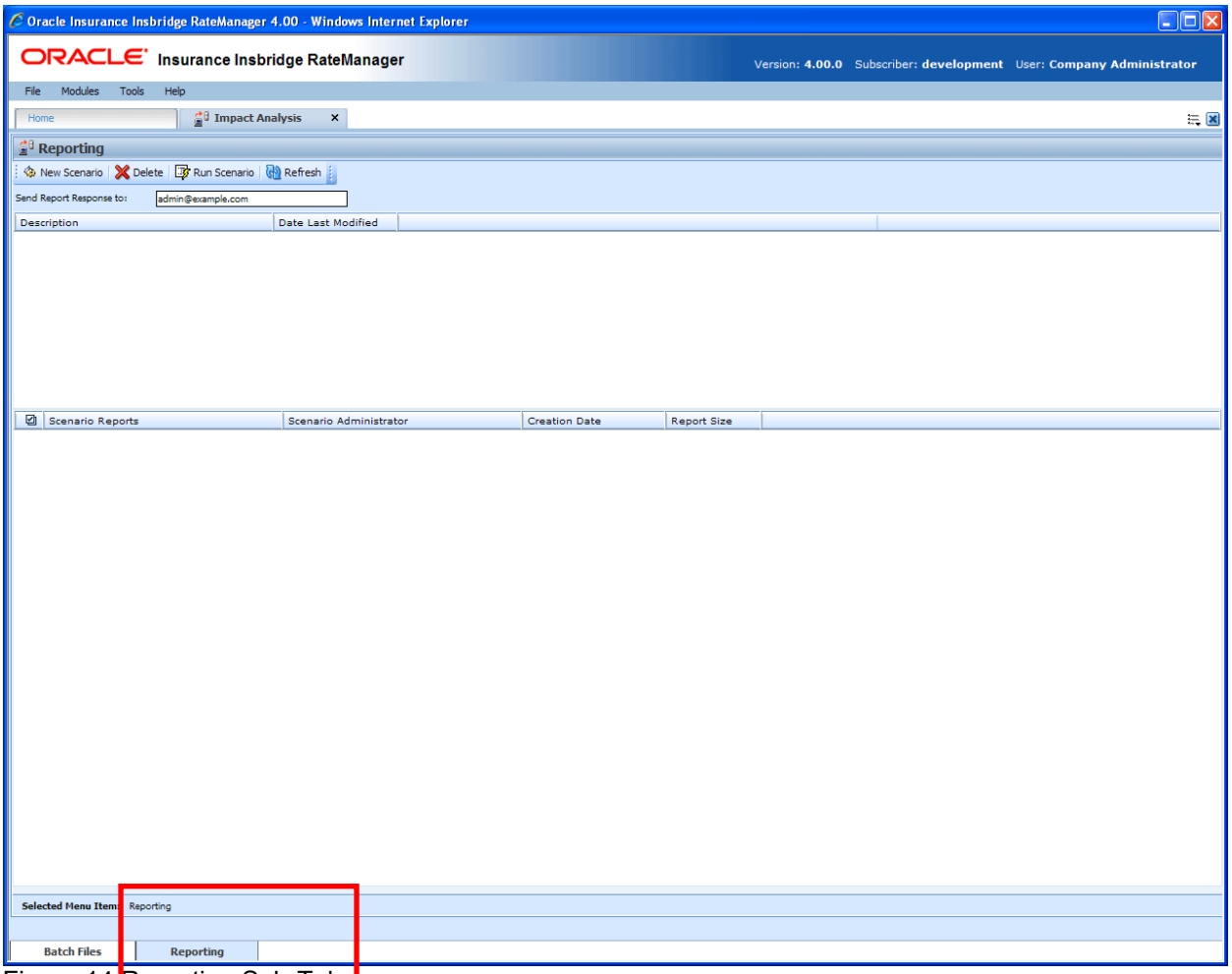
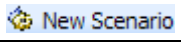
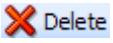
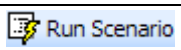
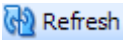


Figure 14 Reporting Sub-Tab

FUNCTIONALITY

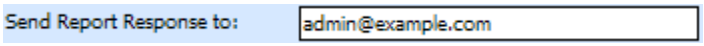
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

Functions:

	**New Scenario:** Begins the process of creating a new scenario.
	**Delete:** Removes the selected scenario or the selected report(s).
	**Run Scenario:** Submits the selected scenario for processing.
	**Refresh:** Refreshes the listing of scenarios and reports.

Definition Options:

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

	**Send Report Response to:** Enter in an email address for the person to be notified when the report is ready for viewing. **This is a required field**.

FIELDS

The fields on the tab are divided over areas:

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

Scenario Listing

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

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

Scenario Reports Listing

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

Check Box: Used to select multiple reports to delete.

Scenario Reports: Name of the report.

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

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

Report Size: Size of the report.

Right Click Options

There are no right click menu options for Reporting.

NEW SCENARIO

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

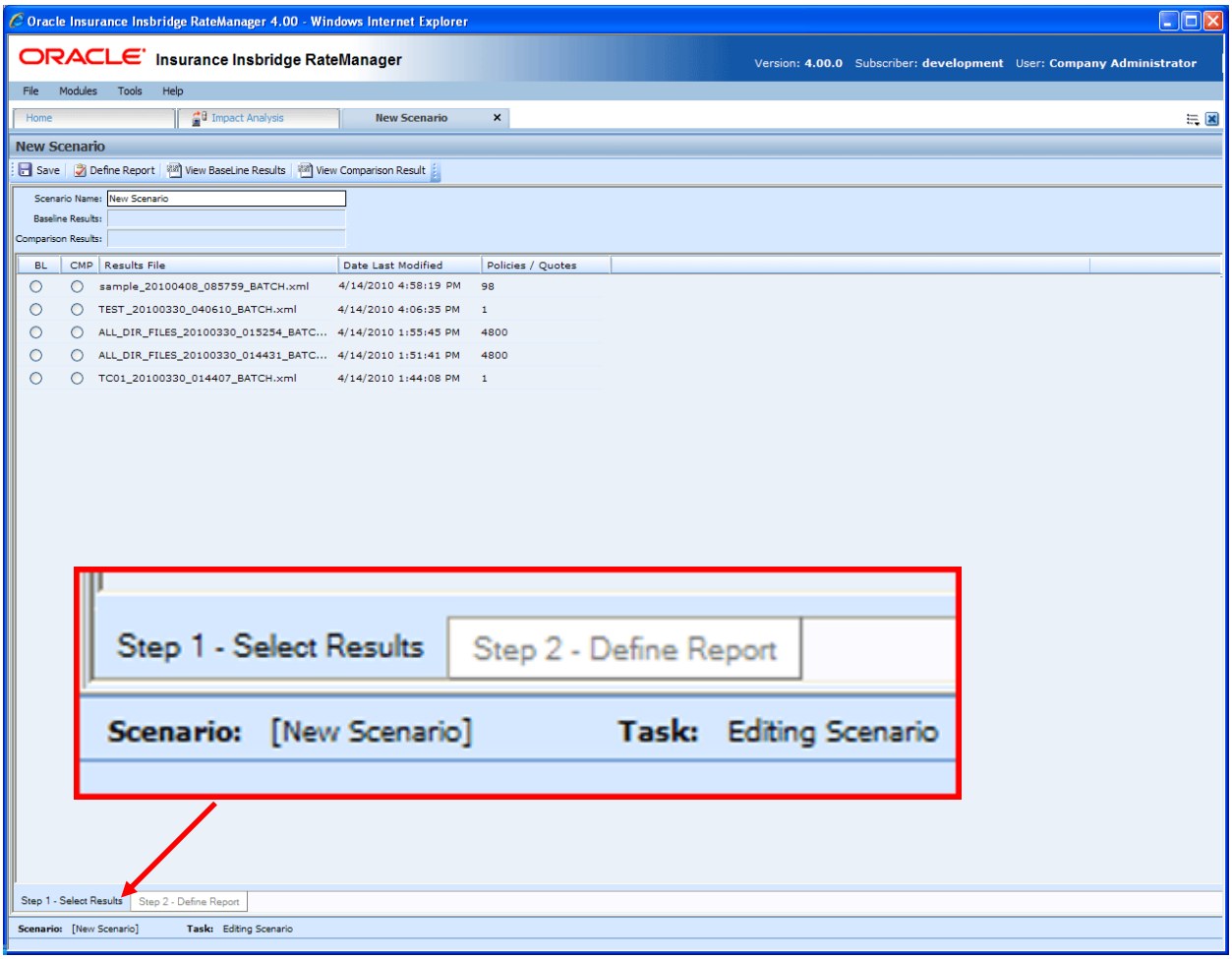


Figure 15 Creating a New Scenario

The New Scenario tab also has two sub-tabs:

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

STEP 1 – SELECT RESULTS

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

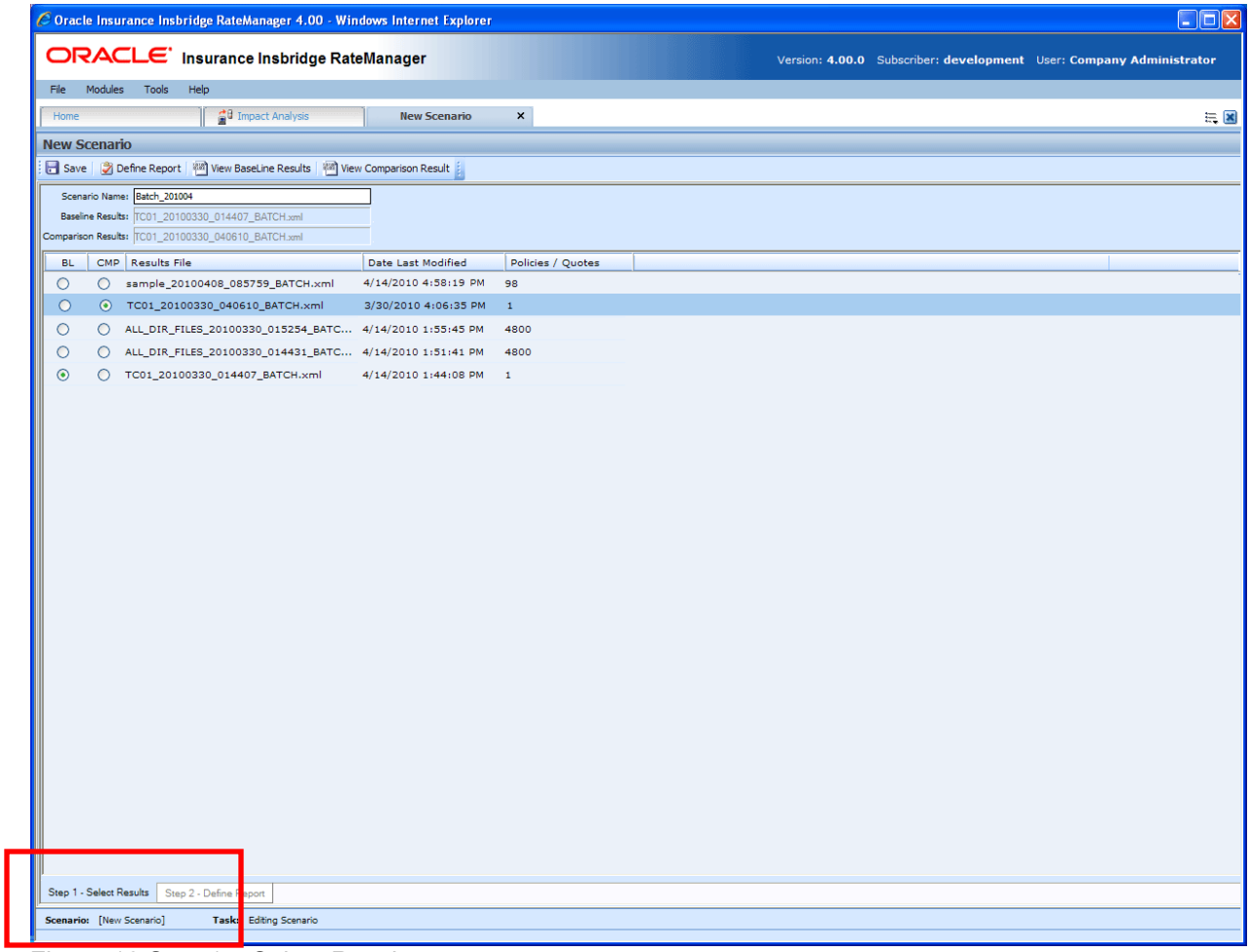
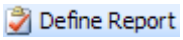
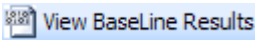
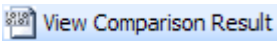


Figure 16 Step 1 – Select Results

FUNCTIONALITY

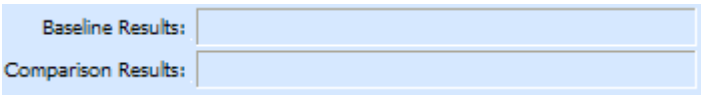
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

Functions:

	Save: Saves changes to the current scenario. If you choose a different baseline or comparison file, the scenario should be saved before defining the report.
	**Define Report:** Opens Step 2 – Define Reports, where you can choose results to filter on and which results to display. If you choose a different baseline or comparison file, the scenario should be saved before defining the report.
	**View Baseline Results:** Allows you to view the Batch Rating Summary report of the selected baseline file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. For more information, see Viewing Baseline and Comparison Files.
	**View Comparison Results:** Allows you to view the Batch Rating Summary report of the selected comparison file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. For more information, see Viewing Baseline and Comparison Files.

Definition Options:

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

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

FIELDS

Results File Listing

The Result File Listing has all the result files from Impact Analysis→Batch Files that are not in Debug. If the file you need is not listed, please return to Impact Analysis→Batch File tab and verify the file is listed. If the file has Debug checked it will not be listed.

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

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

Results File: Name of the results file.

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

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

Right Click Options

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

File Names

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

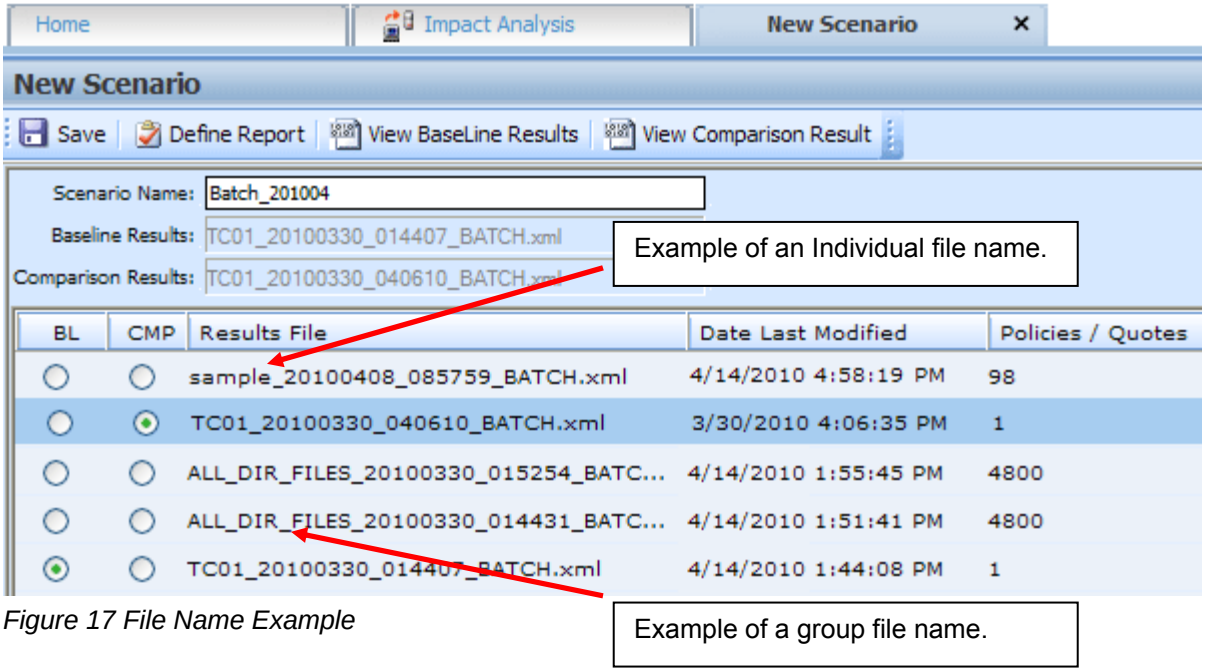


Figure 17 File Name Example

STEP 2 – DEFINE REPORT

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

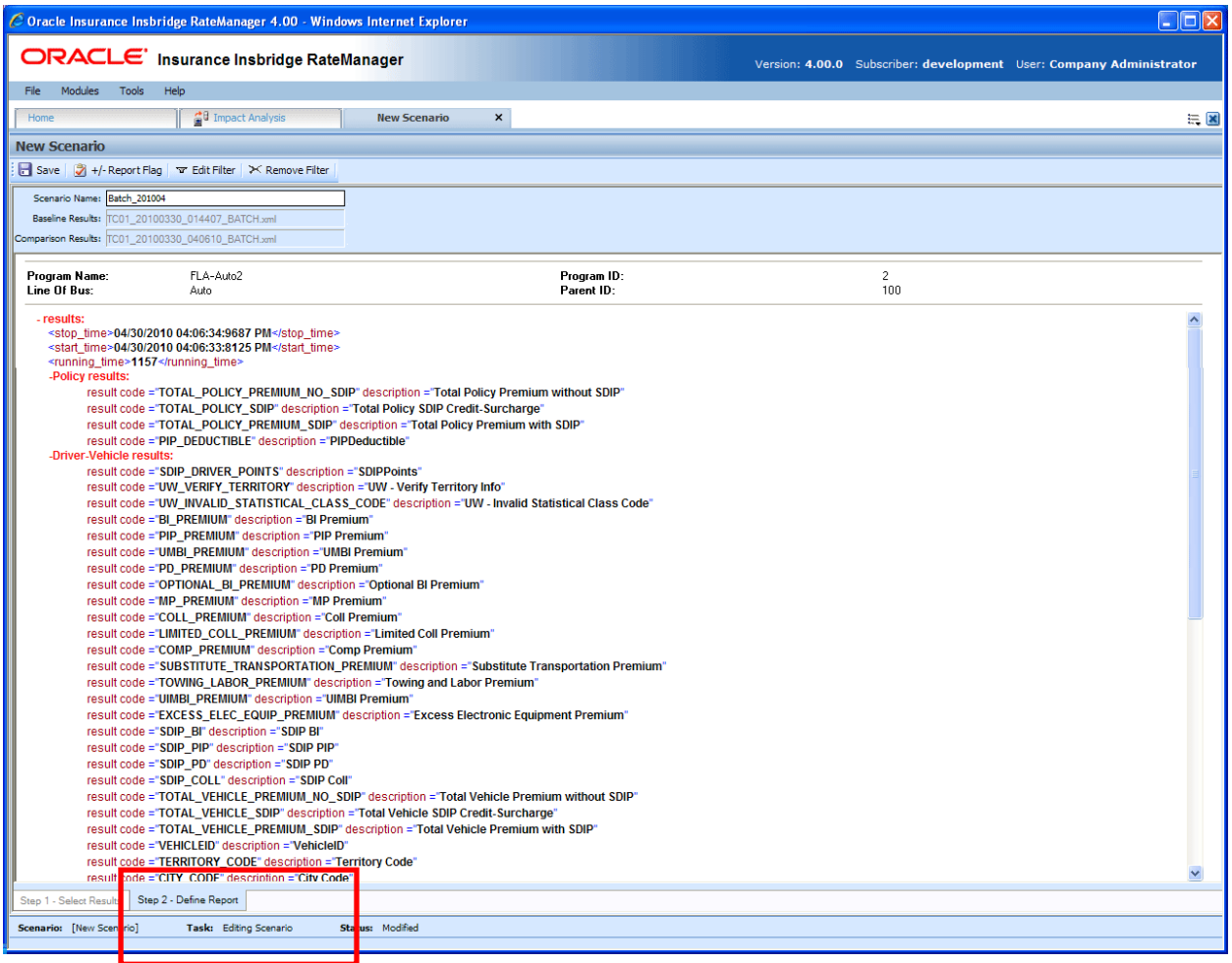


Figure 18 Step 2 – Define Report

FUNCTIONALITY

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

Functions:

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

Definition Options:

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

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

FIELDS

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

Program Information

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

Line of Bus: Line of business the programs are for.

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

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

Results

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

Right Click Options:

Every result line will have right click menu options. To view the right click menu options, select the line you want and right click.

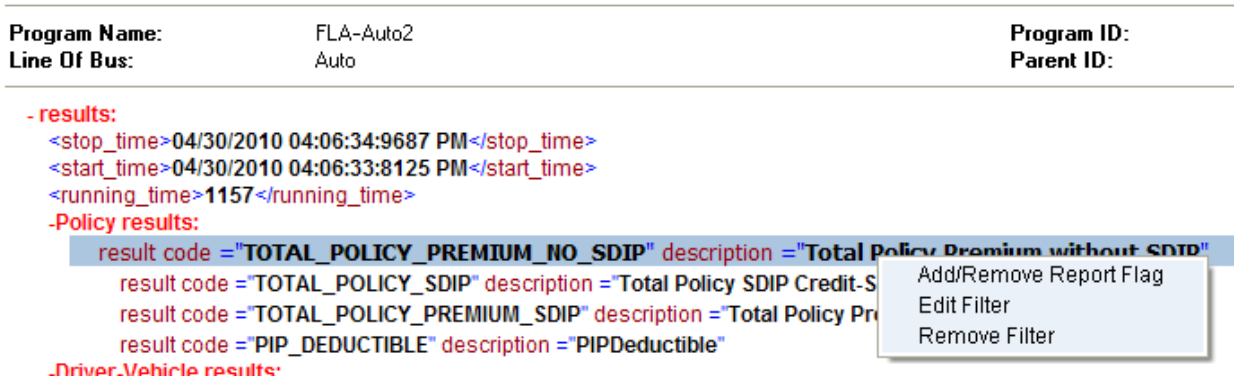


Figure 19 Right Click menu for Step 2 – Define Report

Step 2 – Define Report will have three choices:

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

Report Flags

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

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

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

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

To Flag or Un-flag a Result

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

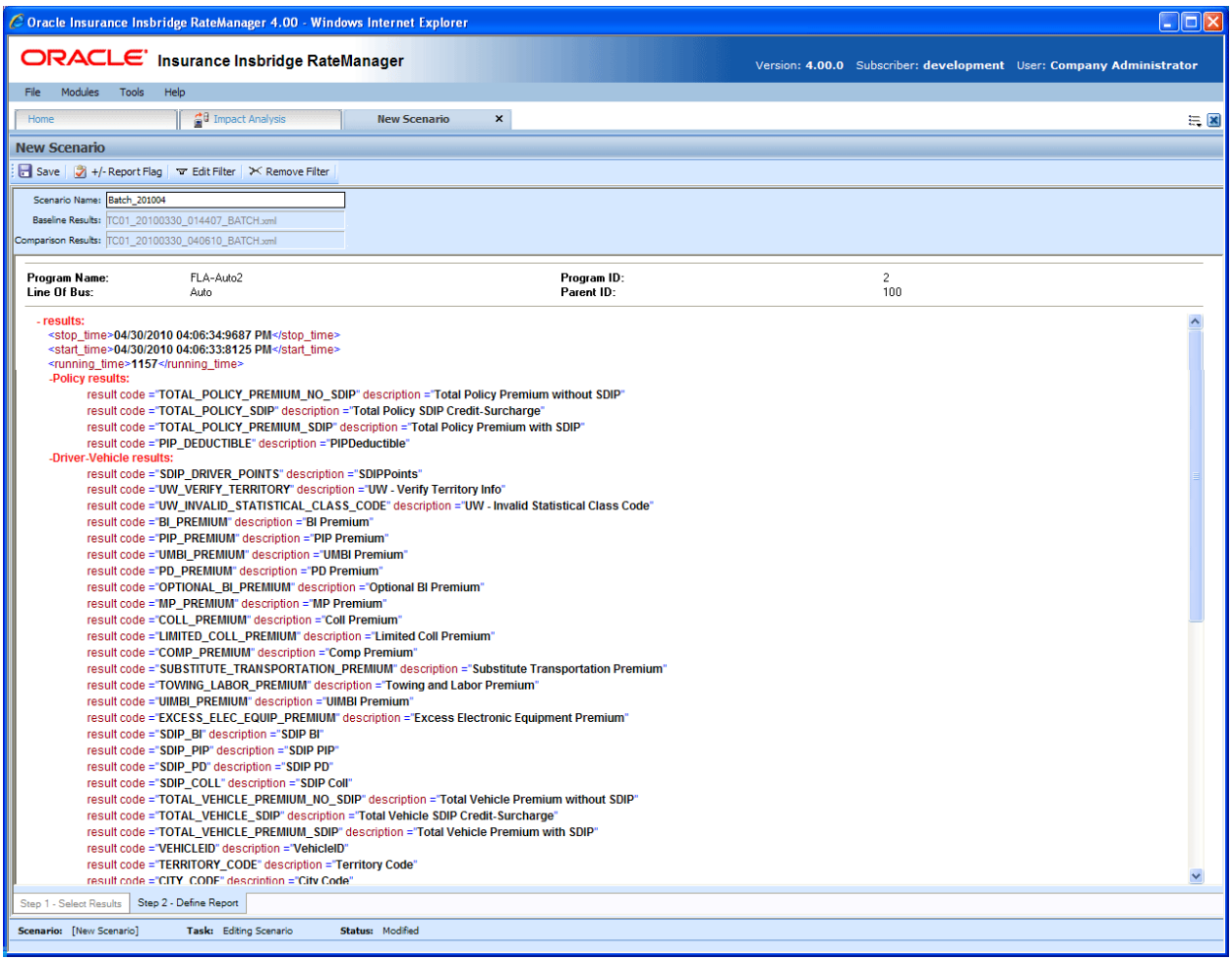


Figure 20 Flagging or Un-Flagging a Result

2. Select the result you wish to flag or un-flag and then click **+/- REPORT FLAG**. A flag also can be added or removed by double-clicking the result or by right clicking it and selecting **Add/Remove Report Flag** from the menu.

3. If you added a flag, a check icon ( ) will show next to the result. If you removed a flag, the check icon will be removed.

Report Filters

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

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

To Add/Edit a Filter

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

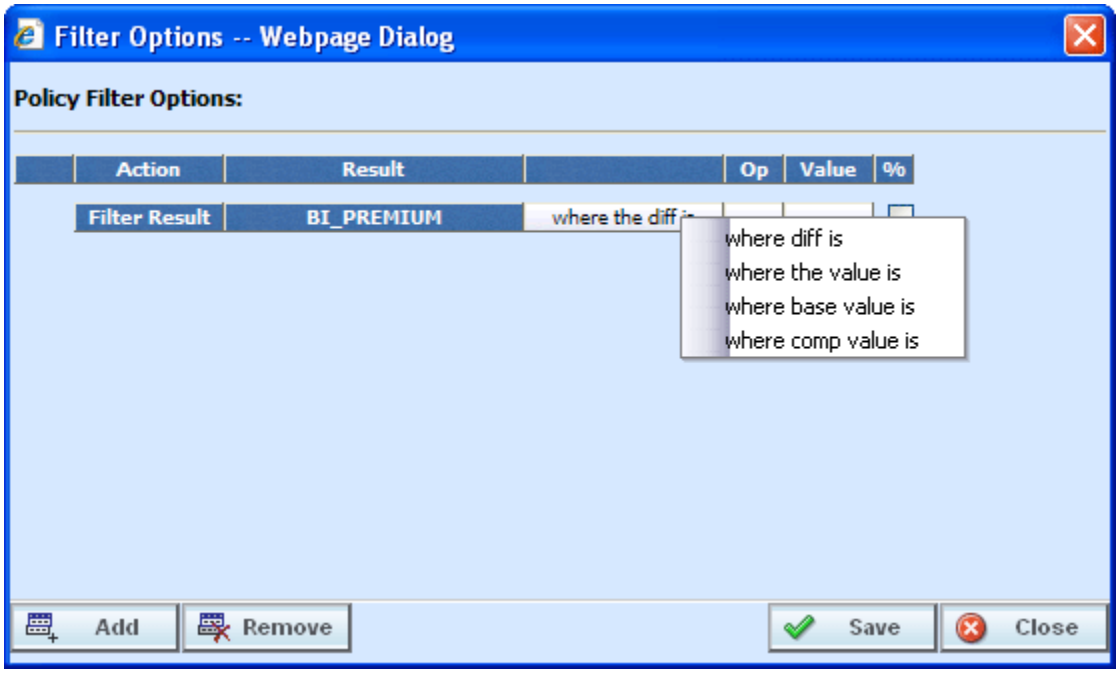


Figure 21 Policy Filter Options

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

There are four types of filters:

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

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

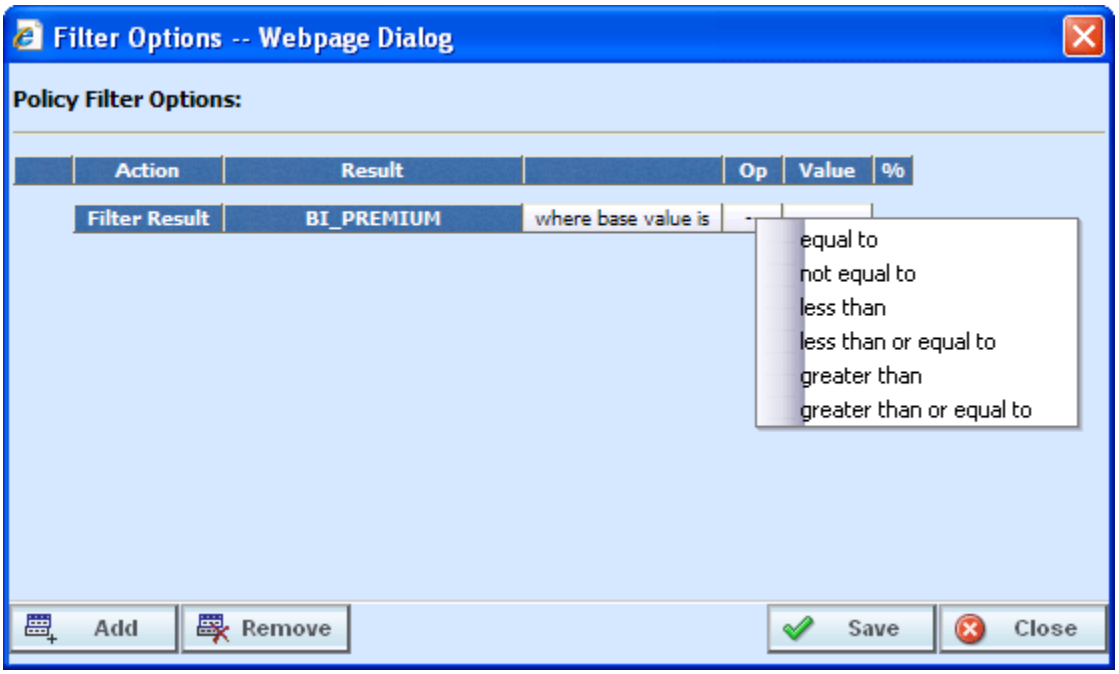


Figure 22 Filter Options Selecting an Operator

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

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

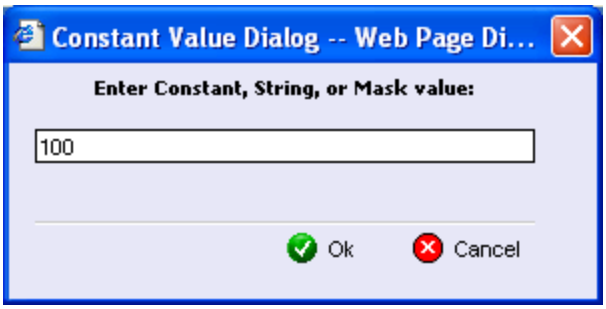


Figure 23 Entering a Constant Value

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

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

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

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

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

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

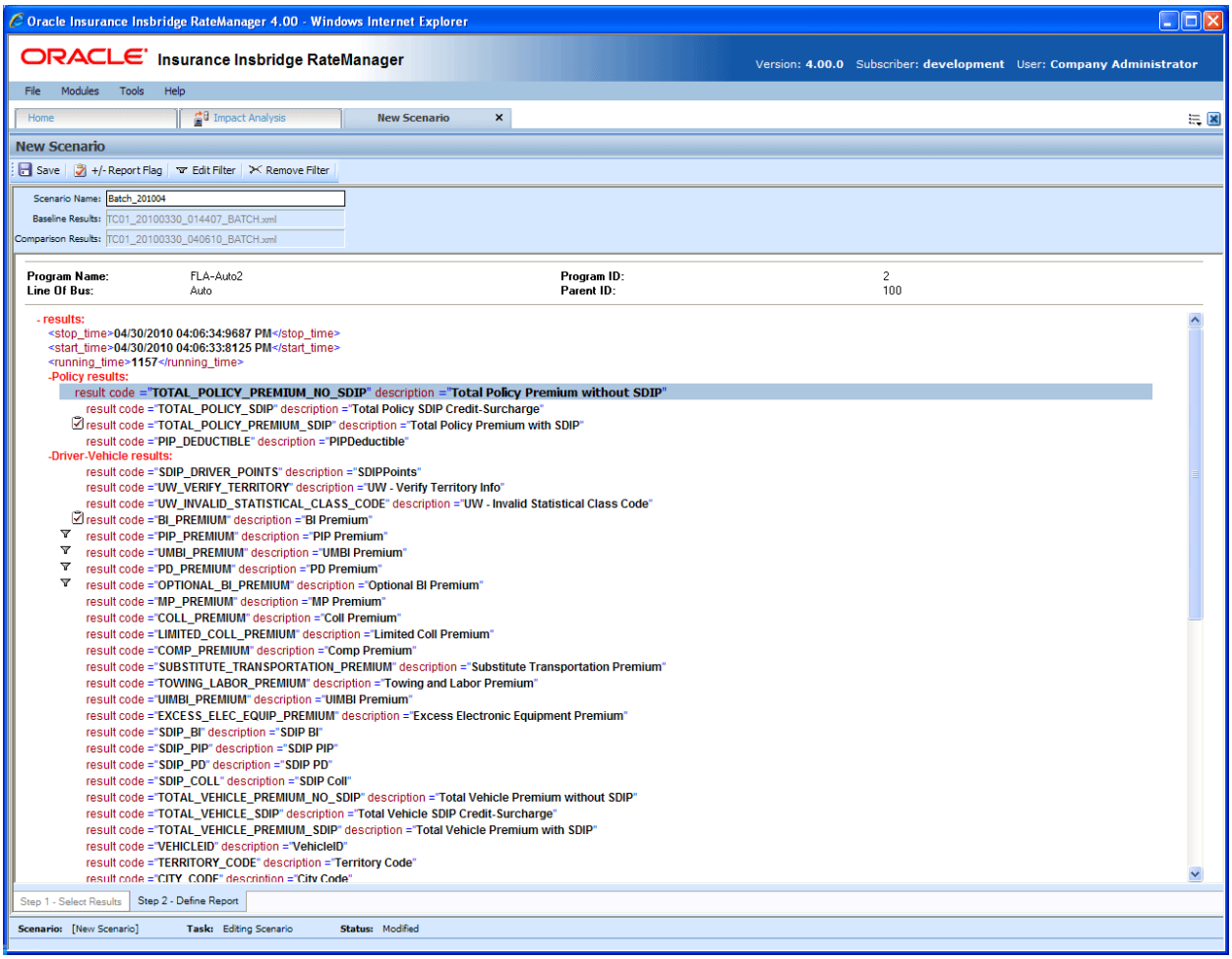


Figure 24 Step 2 – Define Report with Flags and Filters

CREATING A NEW SCENARIO REPORT

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

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

1. The **NEW SCENARIO** tab can be accessed only from the Reporting sub-tab. On the Reporting sub-tab, click **NEW SCENARIO**. This will open a **New Scenario tab**.

2. On the **Step 1 – Select Results** sub-tab, enter a **Scenario Name** and select the **Baseline and Comparison** files you want.

3. If needed, you can further define the report. Enter the **Step 2 – Define Report** sub-tab. Set any filters or flags.

4. **Save** your report.

5. Return to the **Reporting** sub-tab on the Impact Analysis tab. Your report will be listed in the Scenario Listing area at the top. Select your report.

6. Enter a **Response Report email address**.

7. Click **RUN SCENARIO**. A popup message will be displayed that your request has been submitted for processing. If a different message is received, see Batch Error Messages.

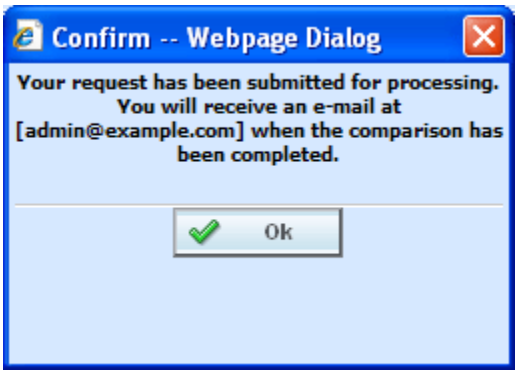


Figure 25 Confirmation Message for Running an Impact Analysis Scenario

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

Batch Error Messages

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

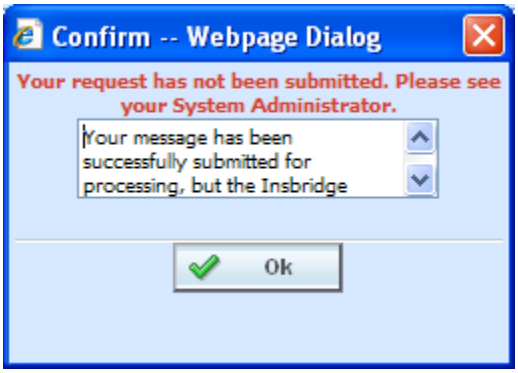


Figure 26 Error Message for Batch Rate

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

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

EDITING A SCENARIO REPORT

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

To Edit a Scenario

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

DELETING A SCENARIO

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

To Delete a Scenario Report

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

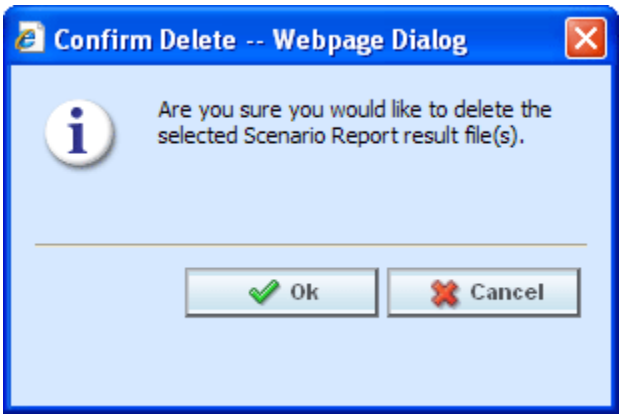


Figure 27 Delete Report Message

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

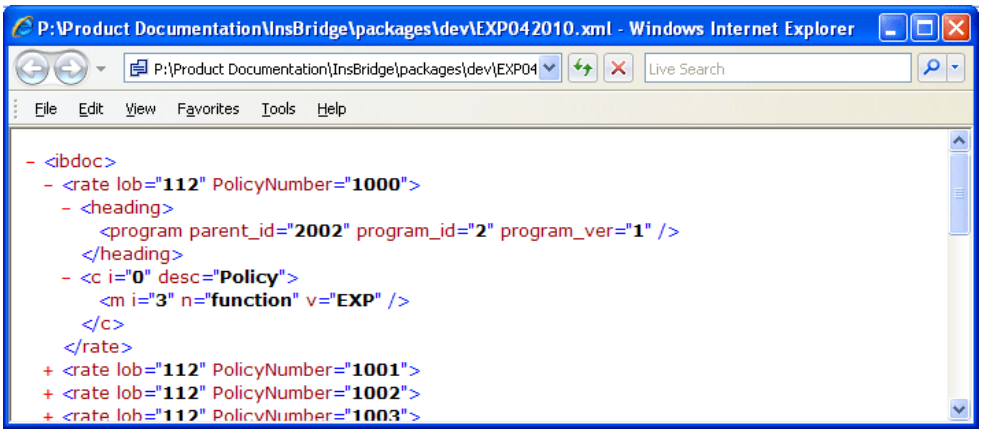
REPORTS

Impact Analysis has a variety of reports:

- **View XML Report:** Located on the right click menu in the XML Input File Listing of Batch Files sub-tab. Also found on the right click menu of the Result XML File Listing. This report allows you to review the input XML being used and make sure this is the file you want to utilize. The selected XML file is displayed in a separate window.
- **View Output Report:** Located on the right click menu in the XML Result File Listing of Batch Files sub-tab. This report allows you to review the result file content to verify that this is the file you want to utilize. The selected XML file is displayed in report format in a separate tab.
- **View BaseLine Results:** This report can be viewed on the Step 1 – Select Results sub-tab. View BaseLine Results allows you to view the Batch Rating Summary report of the selected baseline file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. The information is displayed in a separate window.
- **View Comparison Results:** This report can be viewed on the Step 1 – Select Results sub-tab. View Comparison Results allows you to view the Batch Rating Summary report of the selected comparison file. The report shows information about the result file and the elements (results, variables and inputs) that were selected for output enabling you to verify that you have selected the right file. The information is displayed in a separate window.
- **Scenario Report:** This report can be viewed on the Step 1 – Select Results sub-tab. This report will show the differences between two selected result files, allowing you to compare the effects of a program change against existing rates. The report is displayed in a separate window.

Viewing a View XML Report

Select the **Input XML** or the **Result XML** you want to view and right click. **Select View XML Report** from the menu. Your report will be displayed in a separate window.


P:\Product Documentation\InsBridge\packages\dev\EXP042010.xml - Windows Internet Explorer
P:\Product Documentation\InsBridge\packages\dev\EXP04
Live Search
File Edit View Favorites Tools Help
- <ibdoc>
- <rate lob="112" PolicyNumber="1000">
- <heading>
<program parent_id="2002" program_id="2" program_ver="1" />
</heading>
- <c i="0" desc="Policy">
<m i="3" n="function" v="EXP" />
</c>
</rate>
+ <rate lob="112" PolicyNumber="1001">
+ <rate lob="112" PolicyNumber="1002">
+ <rate lob="112" PolicyNumber="1003">
- <rate lob="112" PolicyNumber="1004">
- <heading>
<program parent_id="2002" program_id="2" program_ver="1" />
</heading>
- <c i="0" desc="Policy">
<m i="3" n="function" v="EXP" />
</c>
</rate>
+ <rate lob="112" PolicyNumber="1005">
+ <rate lob="112" PolicyNumber="1006">
+ <rate lob="112" PolicyNumber="1007">
+ <rate lob="112" PolicyNumber="1008">
+ <rate lob="112" PolicyNumber="1009">
+ <rate lob="112" PolicyNumber="1010">
+ <rate lob="112" PolicyNumber="1011">
+ <rate lob="112" PolicyNumber="1012">
+ <rate lob="112" PolicyNumber="1013">
+ <rate lob="112" PolicyNumber="1014">
+ <rate lob="112"

Viewing a View Output Report

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

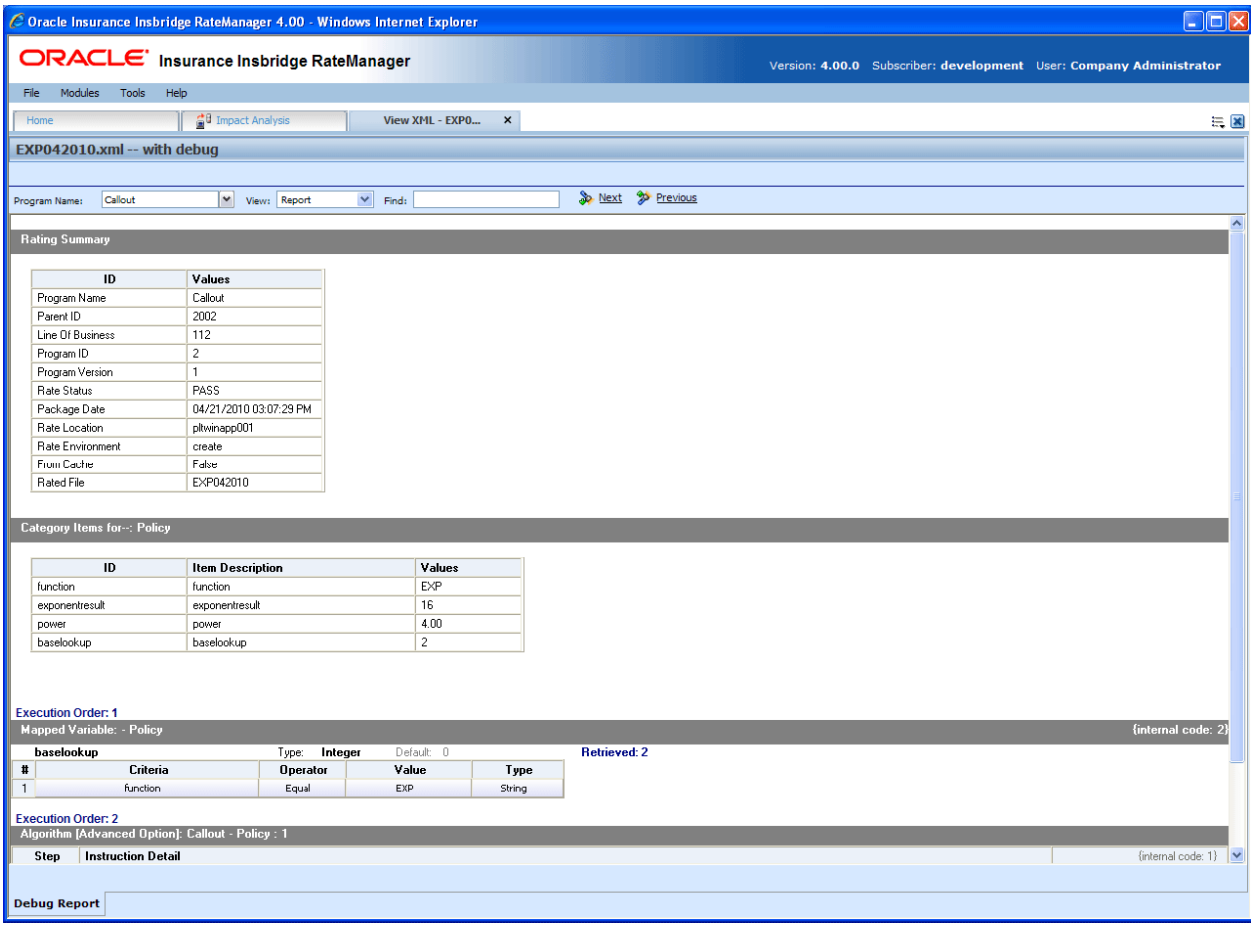


Figure 29 View Output Report

The top bar will contain the file name and the debug option.

Navigation Bar

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

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

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

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

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

Advanced Options

Advanced Algorithm Looping will be displayed only if you have selected Debug. In the gray information bar you will see the [Advanced Option] indicator. The maximum number of loops and the number of loops performed will be displayed.

The Loop Instance will show the number of the last loop run. Details will not be available in Impact Analysis. To see details, please go to Modules→Testing.

If you did not select Debug, Advanced Options will not be displayed.

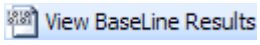
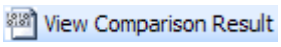
VIEWING BASELINE AND COMPARISON FILES

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

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

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

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

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

To View a BaseLine or a Comparison File

1. On Impact Analysis→Reporting sub-tab, select the scenario report where you want to view the BaseLine or Comparison files. This will open **Step 1** – **Select Results**. You also can view these files when you are creating a New Scenario.

2. If you are creating a new scenario, select the file you need. Otherwise, click **VIEW BASELINE RESULTS** or **VIEW COMPARISON RESULTS** to view the appropriate file. A separate screen will be displayed.

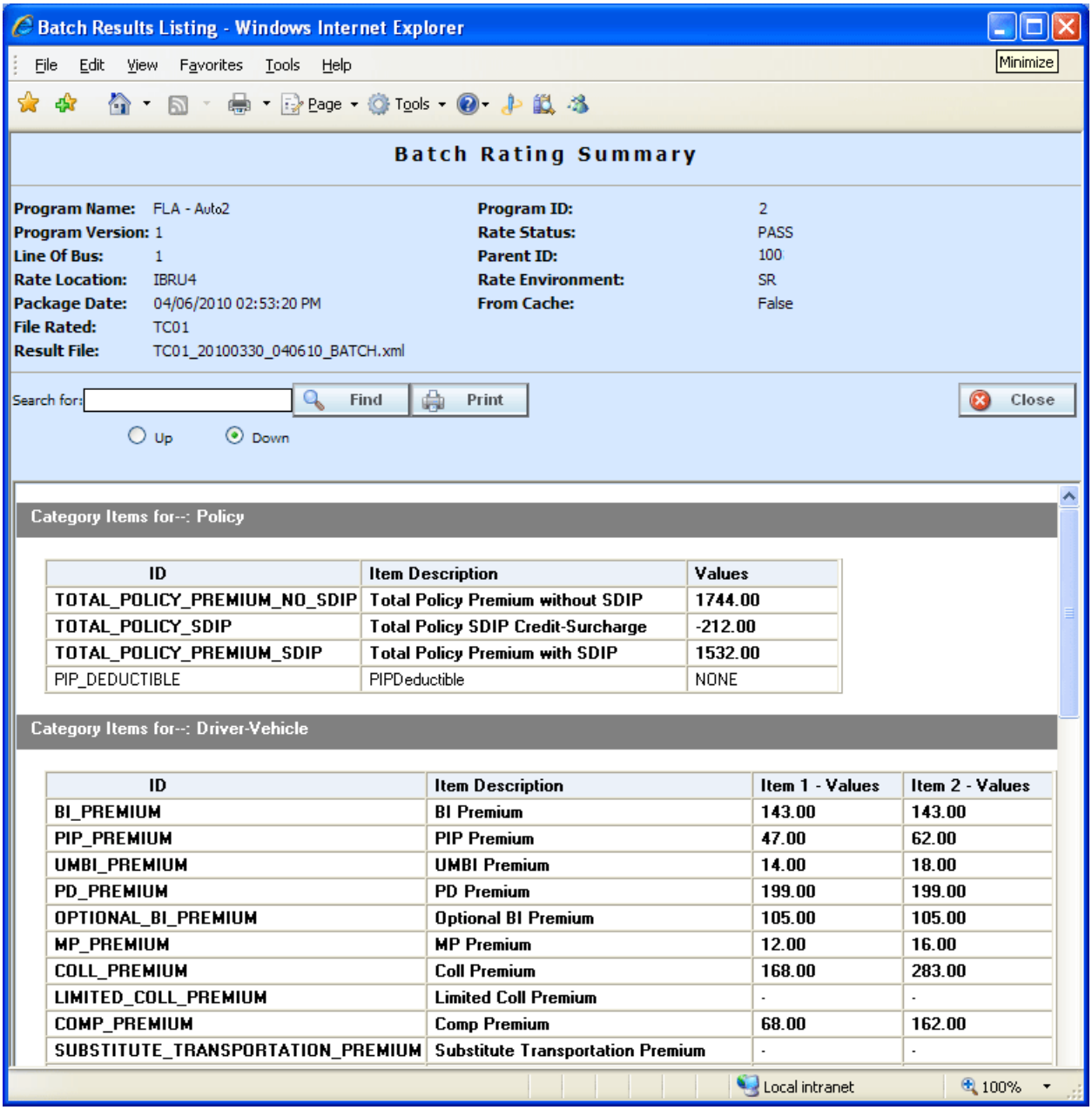


Figure 30 Viewing Baseline or Comparison Files

Program Information

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

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

Line of Bus: Which line of business the program is for.

Rate Location: Displays where the rate information is located.

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

File Rated: Name of the file rated.

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

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

Rate Status: The results of the rating request.

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

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

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

Search

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

Print

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

Close Window

Closes the current Rating Summary report.

Results

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

- **ID:** The Result ID entered on the Edit Group Tab in Result Mapping.
- **Item Description:** The name of the element (result, variable or input).
- **Values:** The value for the element. If multiple instances of the category exist, then there will be a **Value** column for each instance.

VIEWING A SCENARIO REPORT

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

To View a Impact Analysis Report

1. Navigate to Impact Analysis→Reporting sub-tab. Scenario Reports will be listed in the lower portion of the tab. If you do not see your report, click **REFRESH** to refresh the tab.

2. Locate the report you wish to view in the listing and double-click it. The report will open in a separate window.

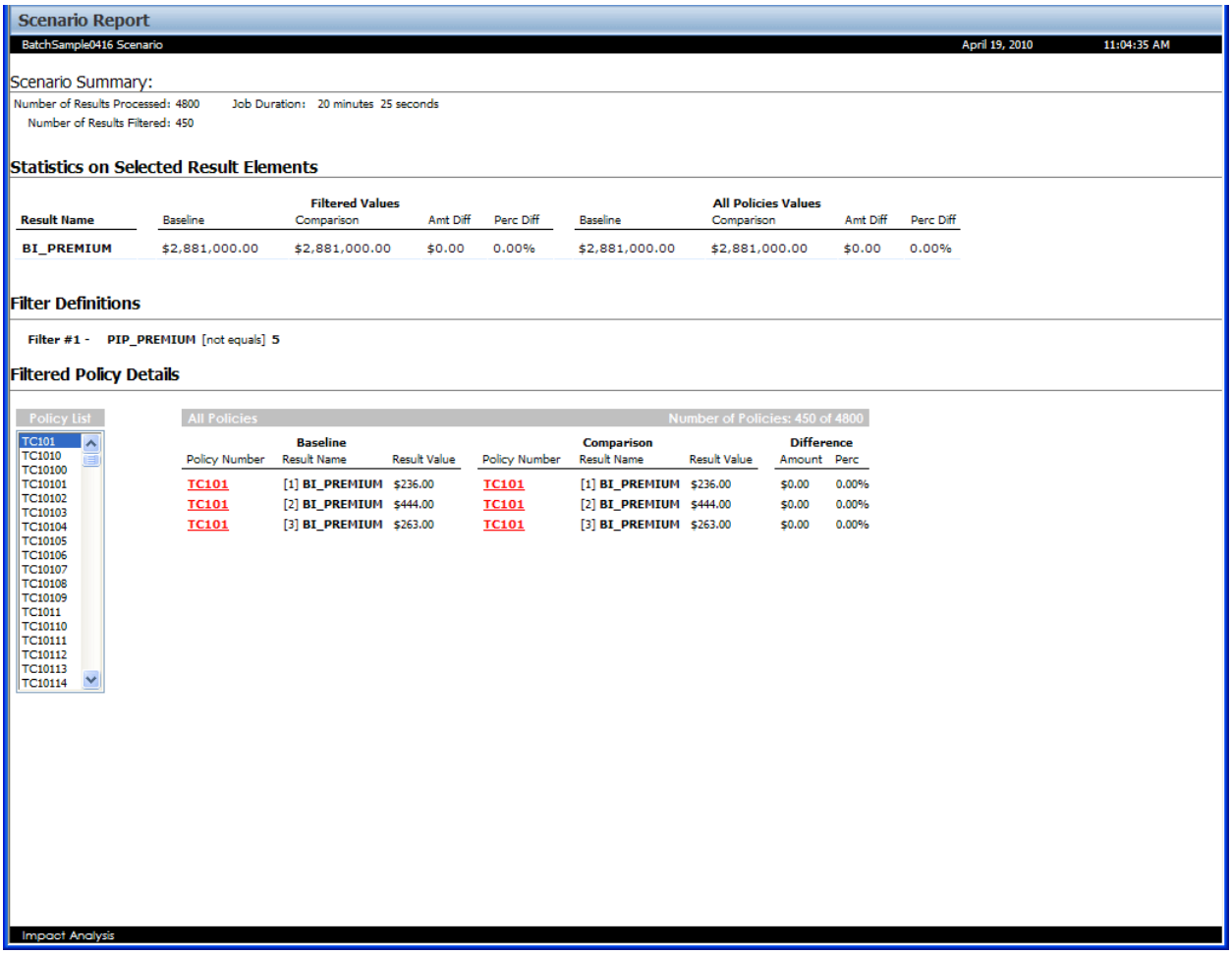


Figure 31 Impact Analysis Scenario Report

Scenario Summary

Number of Results Processed: The total number of policies.

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

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

Statistics on Selected Result Elements

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

Result Name: The name of the result the information is for.

Filtered Values

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

All Policy Values

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

Filter Definitions

A listing of all filters used for the current report.

Filtered Policy Details

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

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

Baseline

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

Comparison

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

Difference

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

CONTACTING SUPPORT

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

Address any additional inquiries to:

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

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

TTY ACCESS TO ORACLE SUPPORT SERVICES

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

GLOSSARY TERMS

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

Scenario:	main sequence of operations to properly define the driver assignment logic for a carrier. A scenario is based upon the same algorithm principle used throughout the RateManager software.
E	
Export:	Exports allow users to export all elements of a program from one database to another database or within the same database. Or to export data in tab-delimited form, from a RateManager table to an outside location.
F	
Flag:	A variable that holds a 1 for true and a 0 for false.
Flag Driver Algorithm:	An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.
Flag Driver Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Driver Algorithm.
Flag Vehicle Algorithm:	An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.
Flag Vehicle Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Vehicle Algorithm.
G	
Global:	An input or variable that is available to all programs under a specific subline.
Global Input:	A value that is passed into the rating system.
Global Result:	A value that is passed out of the system after rating.
Group:	A set of users that have the same access rights.
I	
IBFA	Insbridge Framework Administrator. IBFA is an administrative tool used to configure Insbridge applications and setup RateManager database connections. IBFA will be located on a Windows Server machine. IBFA/SR-WIN is an Insbridge Framework Administrator/SoftRater for Windows.
IBSS	Insbridge SoftRater Server. IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within IBRU that executes the rules, rating and underwriting instructions as defined by the user in RateManager. IBSS is usually located on a Java machine. IBSS/SR-JAVA is an Insbridge SoftRater Server/SoftRater for Java.
IBRU	Insbridge Rating and Underwriting System. This is the entire system.
If:	A step type available for use in calculated variables and algorithms. For more information, see If in the contents section.
Import:	Import allows users to bring in programs from an outside location into RateManager. Or to import data in tab-delimited form, into a RateManager table.
Input:	A value that is passed into the rating system.
Integer:	A data type supported for all types of variables and inputs. Examples of integer values are 3, 1859865 and -47.

Interpolation:	An estimated value derived from two known values.
L	
Library:	The Library is where templates are stored and managed.
Linked Variables:	Two or more mapped variables that have been associated with one another because they use the same criteria.
Lock:	A lock will close all associated Variables, Algorithms, Driver Assignments, Sequencing and Result Mappings in a program version from deletions and edits.
Logical Environment	An environment created for a subscriber in IBFA. It defines package location, engine location and database location in addition to several other supporting data items. This environment is used for rating and/or SRP management. Each database connection will have a logical environment.
M	
Mapped Variable:	A variable that uses other variables and inputs as criteria in determining the appropriate value. See Mapped Variables in the Contents section for more information.
Mask:	A feature that allows the customer to determine how data should be interpreted. See Masking in the Contents section for more information.
N	
Normal Rating Algorithm:	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.
Package Location	A pointer to a location where SoftRater Packages (SRP's) are stored.
Physical Environment	A physical environment is generally referred to as a physical machine.
Program:	A planned group of procedures executed in a specific order to return a rating. Programs in RateManager typically correspond to rate manuals. Programs can be either created by the users or imported.
Program Date Mask:	Specifies how SoftRater interprets dates being passed into an input file.
Program Folders:	A RateManager file management system that functions in much the same way as Microsoft Windows Explorer. This multi level setup allows for an unlimited number of program folders and subfolders to be placed underneath a subline.
R	
Rank Driver Algorithm:	An algorithm used by a Rank Driver Function to rate drivers based on certain criteria.

Rank Driver Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rank Driver Algorithm.
Rank Vehicle Algorithm:	An algorithm used by a Rank Vehicle Function to rate vehicles based on certain criteria.
Rank Vehicle Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rate Vehicle Algorithm.
Rating Environment	The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
Reconcile	A comparison feature that compares one program version against another version in the same program and generate a report of the differences.
Restrictions:	Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator.
Result Mapping:	A defined set of results, inputs and variables displayed in the output file.
Revision:	A variable specific type of versioning. See Versioning in the Contents section for more information.
RM	RateManager. RateManager is a component within IBRU that enables users to manage the product definition and modification process, including rating and underwriting logic.
S	
Sequence:	The order in which algorithms run. See Sequencing in the Contents section for more information.
SoftLibrary:	A SoftLibrary is a specially developed program that performs a specific task. SoftLibraries may run their own code or call upon other systems to obtain information outside of RateManager, for example, obtaining a credit score
SoftRater Node	A SoftRater node is either an IBFA (without RateManager) or IBSS instance on a physical environment.
Source:	The source is the creator of a template and will also be the name of the new subline.
SR	SoftRater. The engine that executes the rating, rules and underwriting instructions defined within RateManager. The rating environment for runtime execution and processing of business content. SoftRater can be further defined by the operating system where it has been loaded.
SRP	SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.
SR-JAVA	SoftRater for Java. This is also another name for IBSS.
SR-WIN	– SoftRater for Windows. This is also another name for IBFA.
String:	A data type supported for all types of variables and inputs. Examples of string values are "2.718", "The quick brown fox jumps over the lazy dog." and "001".
Subline:	Sublines are classifications that fall in between lines of business and program folders. Sublines allow for the separation of programs by source.

T	
Tab-delimited:	A type of text file in which columns are separated by tabs. This is the required format for importing tables into RateManager.
Template:	Templates are exact copies of existing programs within a line of business that can be from within your own user group, any other user group within the company or even from an outside company.
U	
Unassigned Driver:	A driver who has not been assigned to a vehicle.
Unassigned Vehicle:	A vehicle that has not been assigned a driver.
Underwriting Algorithm:	A type of algorithm used to determine if a policy meets the requirements of the company.
Universal:	A collection of programs from all lines of business combined with result group mappings and assigned to execute in sequence that returns a single or multiple results.
V	
Variable:	A name used to represent a value that can change. See Variables in the Contents section for more information.
Version:	One of a sequence of copies of a program, each incorporating new modifications. See Versioning in the Contents section for more information.
VFS	Virtual File Servers. Virtual file server management allows you to set up servers that are in different locations where packages can be downloaded.
W	
Wildcard:	An option available for mapped variables that tells RateManager that one or more rows ignore the value passed in for the criteria. See Variables in the Contents section for more information.
Workflow:	A workflow is a type of program that allows you to call multiple programs from different lines of business together under one universal program.
Working Category:	A classification used to define how elements should run. See Categories in the Contents section for more information.
X	
XML ID:	A number automatically assigned by RateManager to identify inputs and categories.

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