ORACLE
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Oracle Insurance

Insbridge Rating and Underwriting

Releases User Guide

Release 4.0.1

August 2010

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Oracle Insurance Insbridge Rating and Underwriting Releases User Guide

Release 4.0.1

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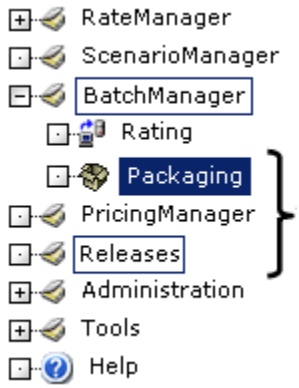
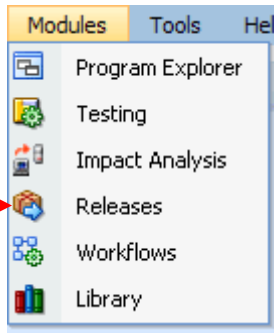
PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting Releases Guide*. This guide describes the features and functionality of the Oracle Insurance Insbridge Rating and Underwriting Releases (Releases) Module. Releases is a combination two features from previous releases, Packaging Packaging and RateManager Releases.

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

Releases is available from the Module **Menu**.

RateManager 3.13 and earlier	RateManager Release 4.0.1
	 **Packaging (Batch Packaging) has been combined with Releases. Releases is an option on the Modules menu.** Releases will only be displayed if you have permissions to perform releases.

NOTE: *Packaging Rating is located in Modules→Impact Analysis→Rating.*

AUDIENCE

This guide is intended for RateManager users and system administrators who are tasked with 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 in-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, 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	P01-719-01	R 4.0	April 2010	
2nd Edition	P01-719-02	R 4.0.1	August 2010	

Chapter 1

INTRODUCTION TO RELEASES

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

Releases contains two *sub-tabs*:

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

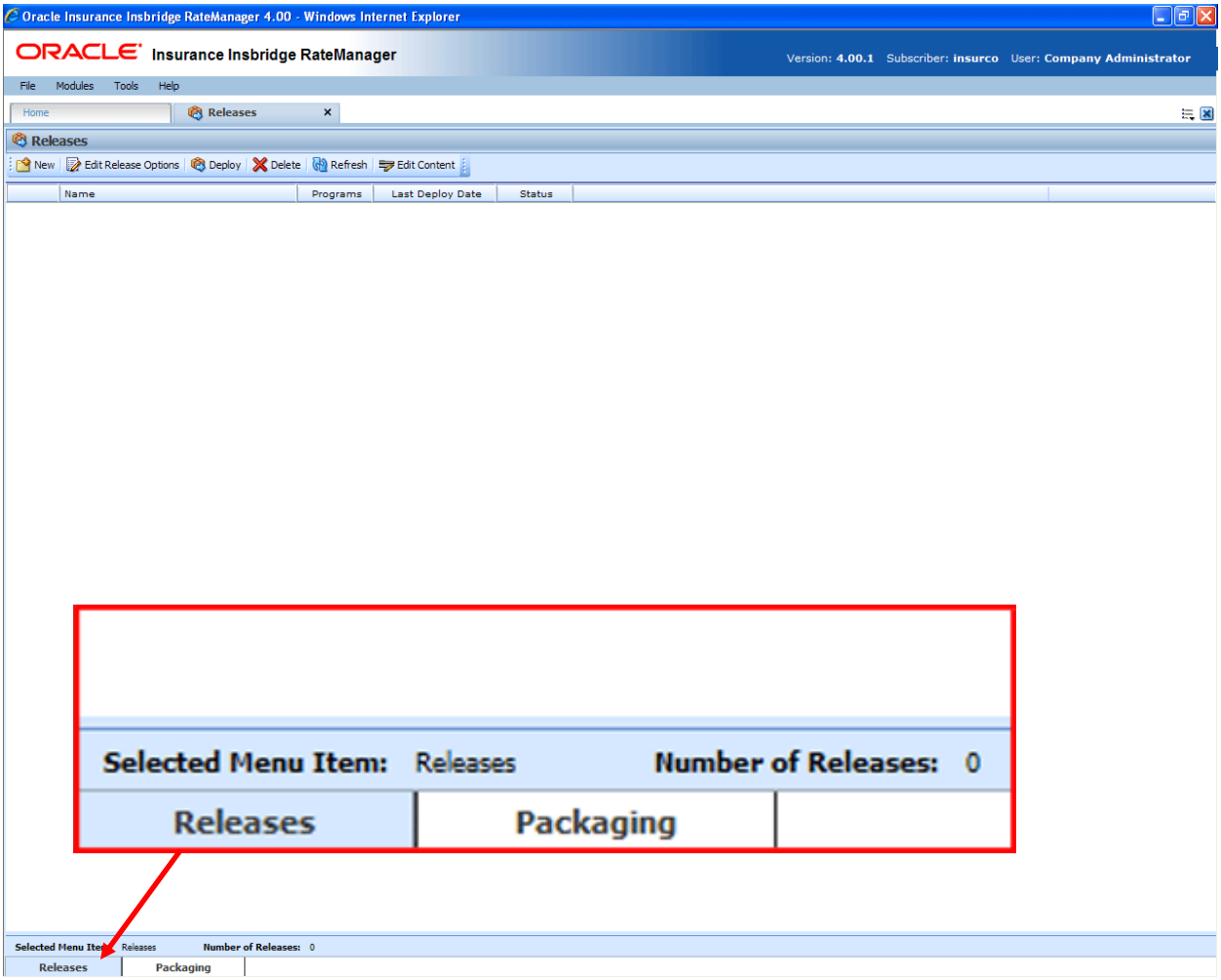
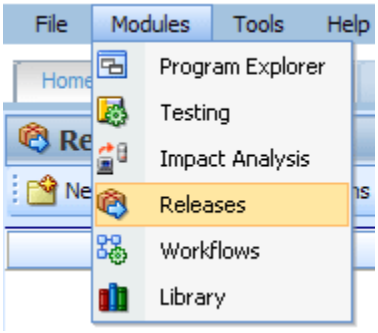


Figure 1 Releases Screen

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

To Navigate to Releases

1. Select Modules→**Releases**.



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

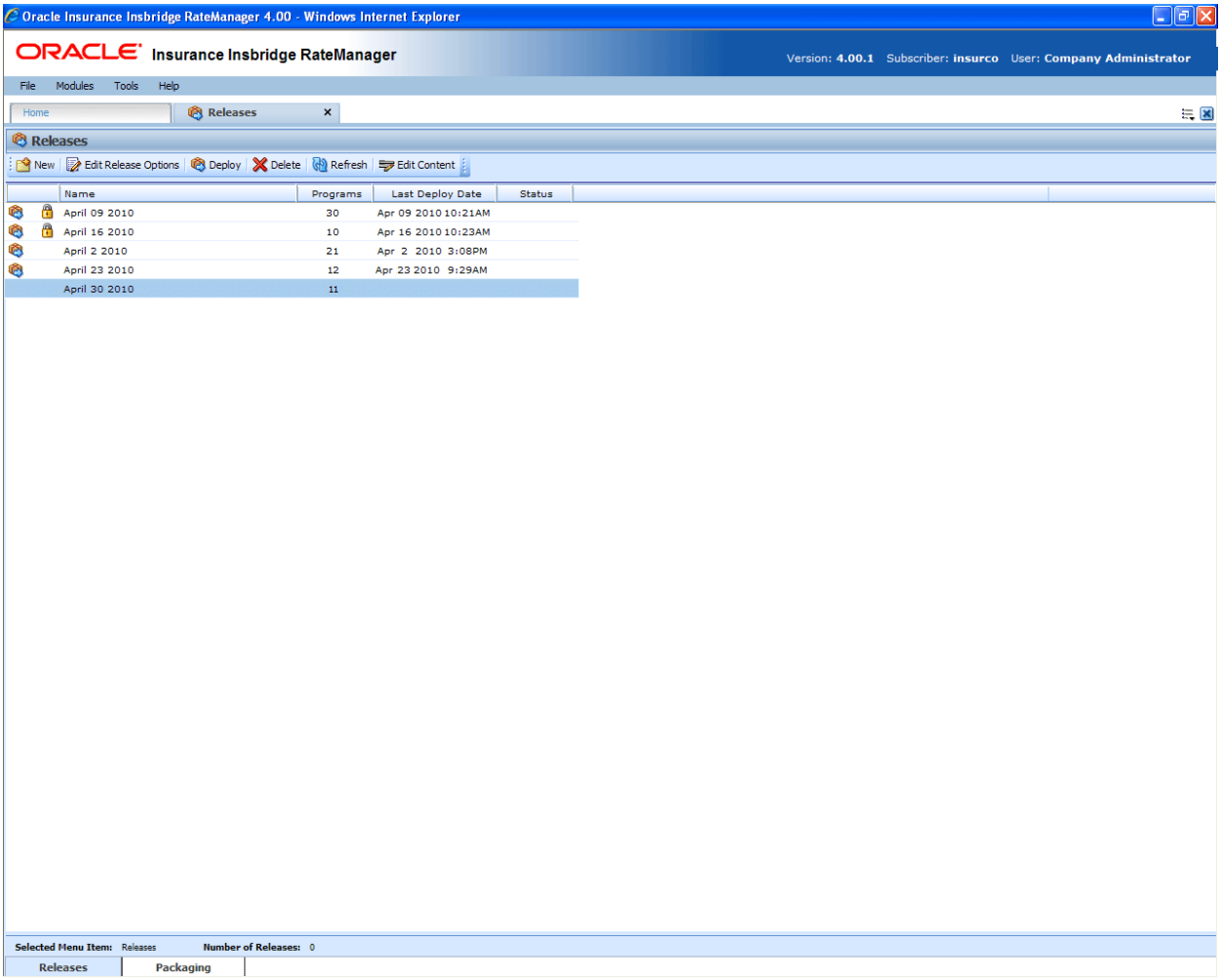


Figure 2 Releases Screen

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

Releases Security

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

RateManager Package Admin→Release Management

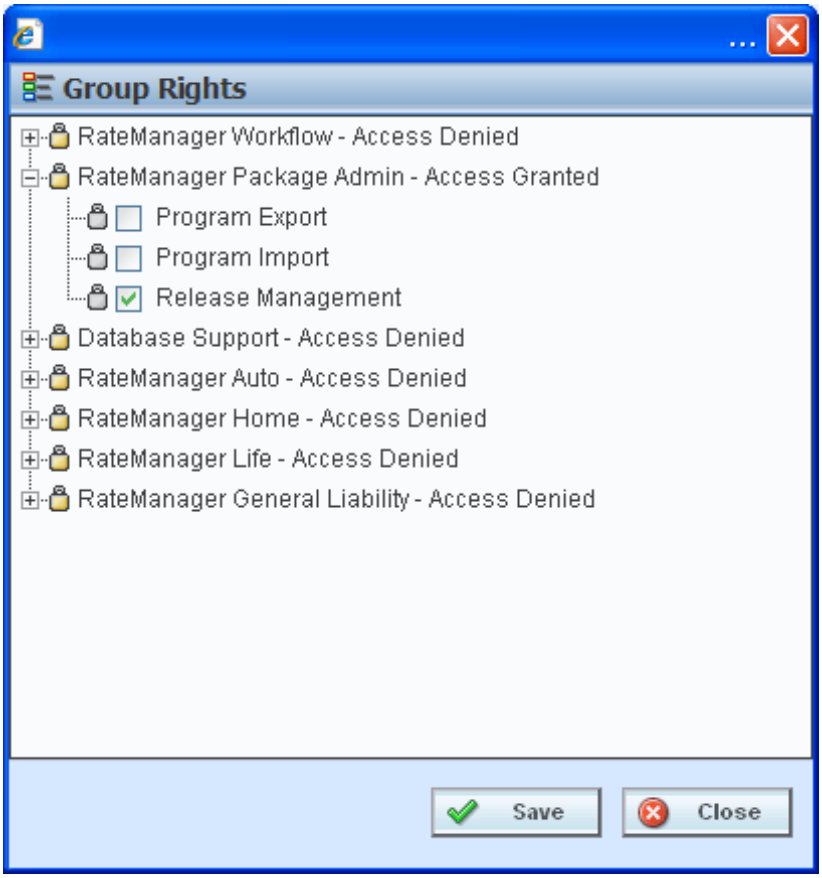


Figure 3 Release Manager Rights

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

RELEASES

The first sub-tab is Releases. Releases allows groups of rating packages to be automatically deployed and loaded to IBFA through a release. With the appropriate rights, a user or RateManager Administrator will have the ability to deploy the rates directly to SoftRater without manually loading the packages through IBFA.

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

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

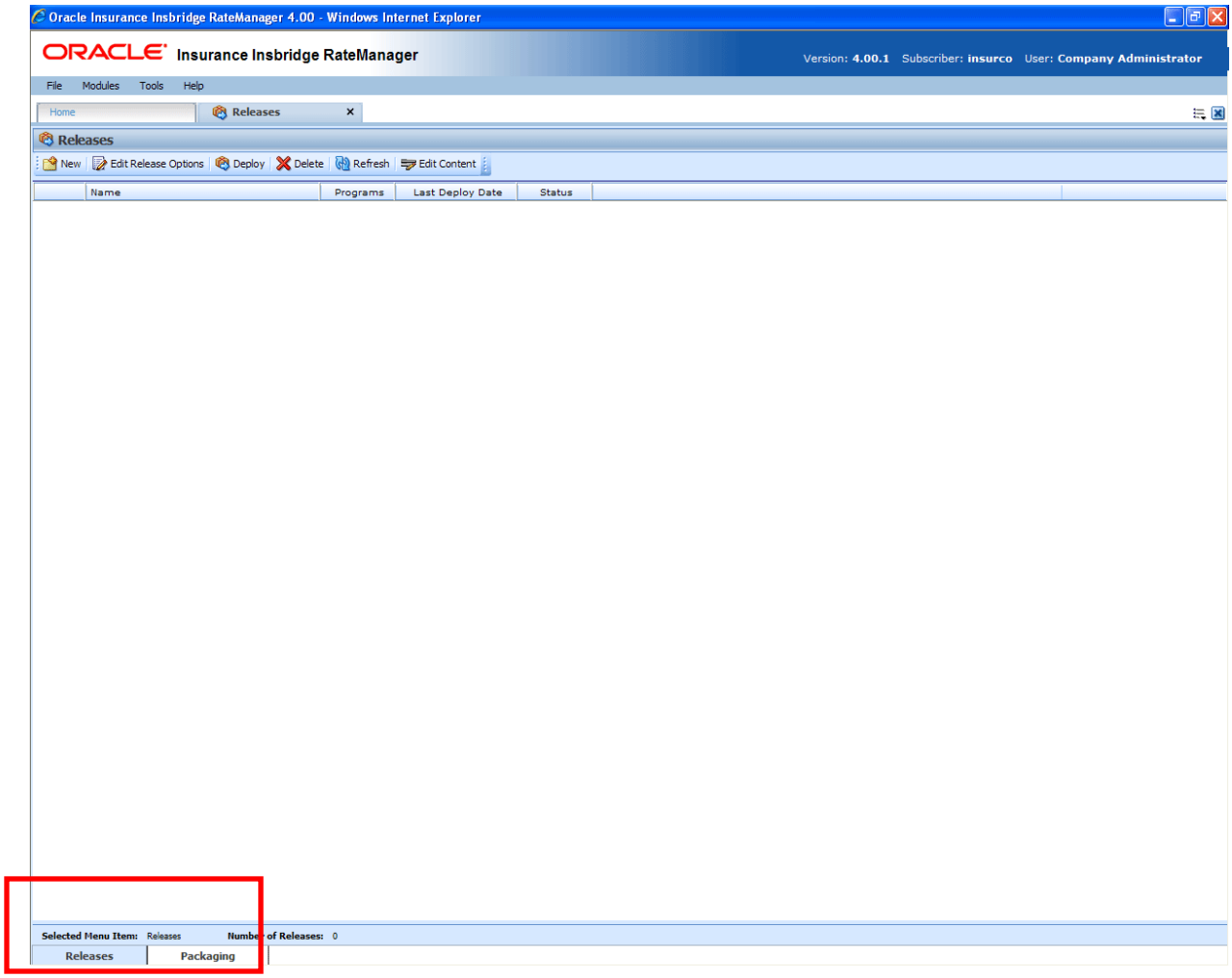
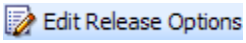
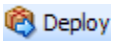
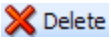
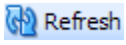
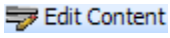


Figure 4 Releases Sub-Tab

FUNCTIONALITY

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

Functions:

	New: Starts the process of creating a new release. See Creating a New Release for more information.
	**Edit Release Options:** Allows you to change information about the selected release. This includes the description, notes, administrator email address and the packaging option.
	**Deploy:** Opens the Deployment Window and allows you to deploy a release to a selected environment.
	**Delete:** Removes the selected release from the release listing.
	**Refresh:** Refreshes the list of releases.
	**Edit Content:** Opens the Edit Content screen for the currently selected release.

FIELDS

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

Releases Listing

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

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

Name: Name of the release.

Programs: The number of programs currently included in the release.

Last Deploy Date: The time stamp of the most recent deployment date.

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

Right Click Options

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

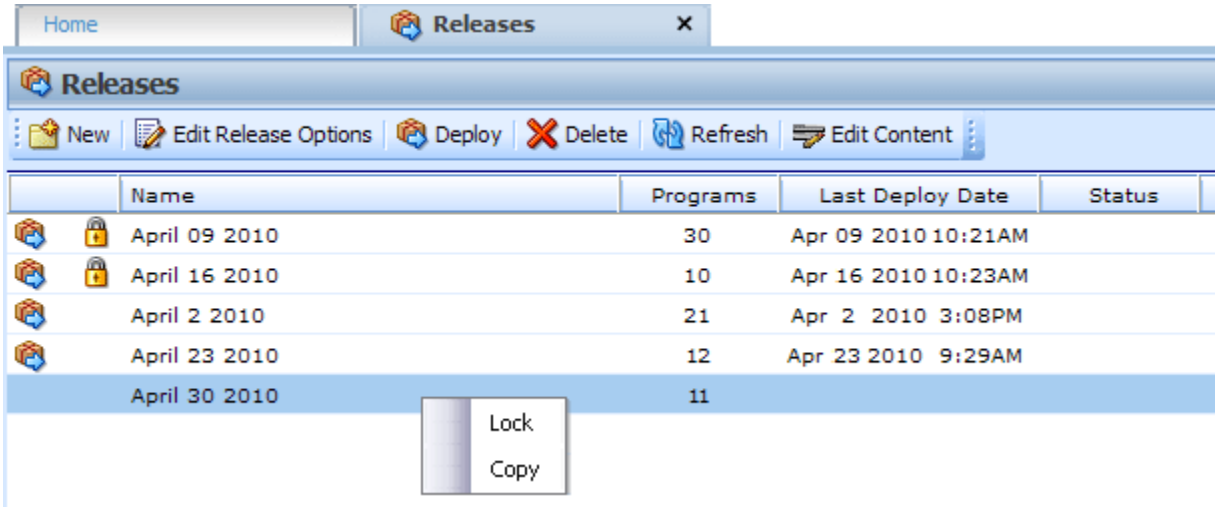


Figure 5 Right Click Menu for the Releases Listing

Releases Listing has two choices:

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

  OR

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

Enforce Release Packaging

Enforce Release Packaging is an option of Tools→Preferences.

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

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

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

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

CREATING A NEW RELEASE

There is no limit to the number of releases you can create.

To Create a New Release

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

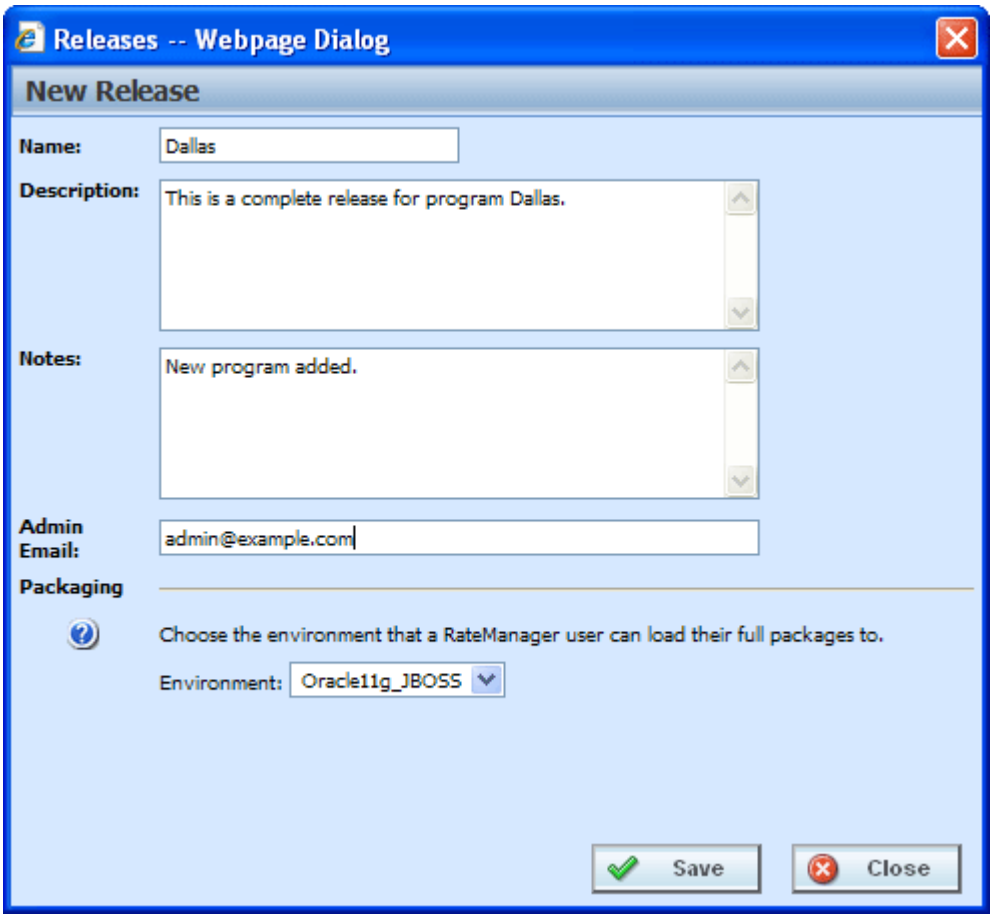


Figure 6 Creating New Release

3. Enter a name, description and any applicable notes for the new release.

4. Enter an email address. This address will be used for all system notifications regarding the release. If an email address has been provided, after deployment to IBFA, a confirmation email will be sent.

5. Choose a development environment to automatically deploy the release to. If no environment has been provided for the release (N/A), users CANNOT create a SoftRater package. They will be able to create RateManager packages only.

6. Click **SAVE** to save the release.

Edit Release Options

Unlocked releases can be edited at any time. The name will not be open for editing. If you have made a mistake with the name, you can delete the release with the incorrect name and create a new release. Or you can copy the release and name the copy with the correct name. All other fields are open for changes. Locked releases cannot be edited. You will have to unlock the release to edit. Editing is performed in the same screen as creating a new release.

1. Select the release you want to edit and click **EDIT RELEASES OPTIONS**.
2. This will open the **Edit Release Options** screen for the release. Make your changes.
3. Click **SAVE** to save the release.

Copy Releases

Any release can be copied at any time. All programs contained within the release will be copied. The included programs will be locked. The copy function is performed from the right click menu.

1. Select the release you want to copy.
2. Right click and select **Copy** from the menu. A separate screen will be displayed.

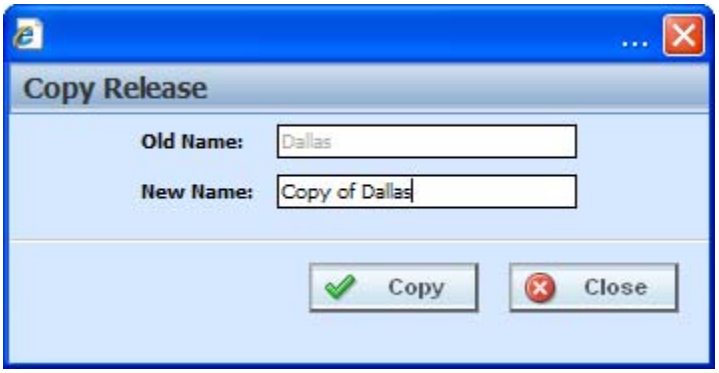


Figure 7 Copy Release

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

Locking a Release

A release can be locked at any time. A locked release cannot have any programs added or removed. A locked release cannot have the release options changed. If you want to change release options, you must unlock the release. A locked release can be deleted. The lock function is performed from the right click menu.

1. Select the release you want to lock and right click.
2. Select **Lock** to lock the release. On the Releases tab, a lock icon will be placed in front of the release.

Deleting a Release

Releases can be deleted at any time. It is possible to delete locked releases.

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

Deploying a Release

A release can be deployed at any time.

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

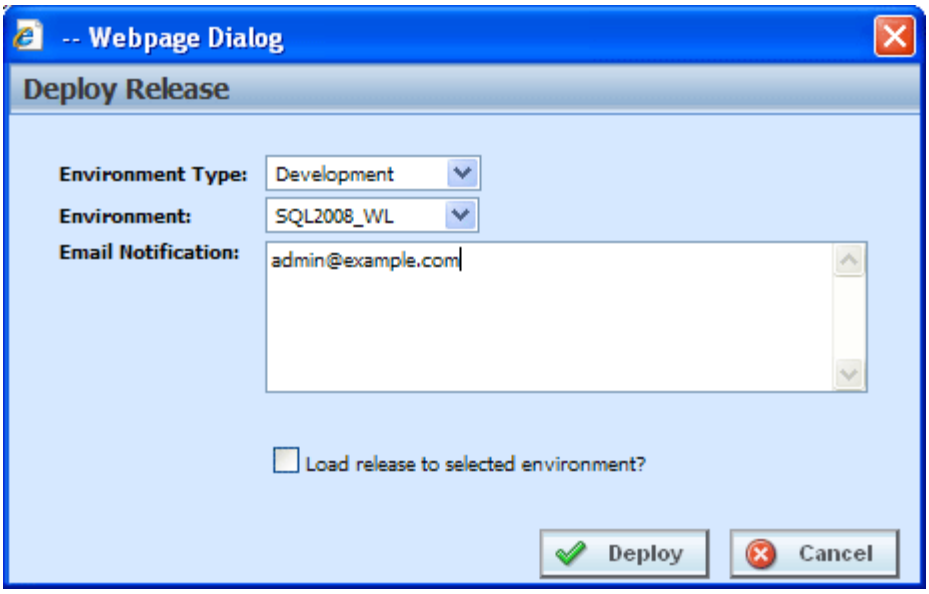


Figure 8 Deploying a Release

4. Select the Environment Type and Environment from the drop down menus. Different environments may be selected to deploy the release to.
5. Enter in the email notification information.
6. Check the “Load release to selected environment?” checkbox to automatically load the release into the selected environment. This allows the release to bypass the IBFA tool and be loaded directly into the environment that you selected.
7. Click **DEPLOY** to deploy.

If there are any problems with the deployment environments, please contact your system administrator.

EDIT CONTENT TAB

The Edit Content tab can be accessed only from the Releases sub-tab by clicking Edit Content. This tab is where you add or remove programs from the release. You also can create packages from this screen as well as lock packages. Releases that are not locked can be edited at any time. If a release is locked, you must unlock it before you can continue.

1. Select the release you want to edit and either double-click it or click **Edit Content**.

2. This will open the **Edit Content** tab for the release.

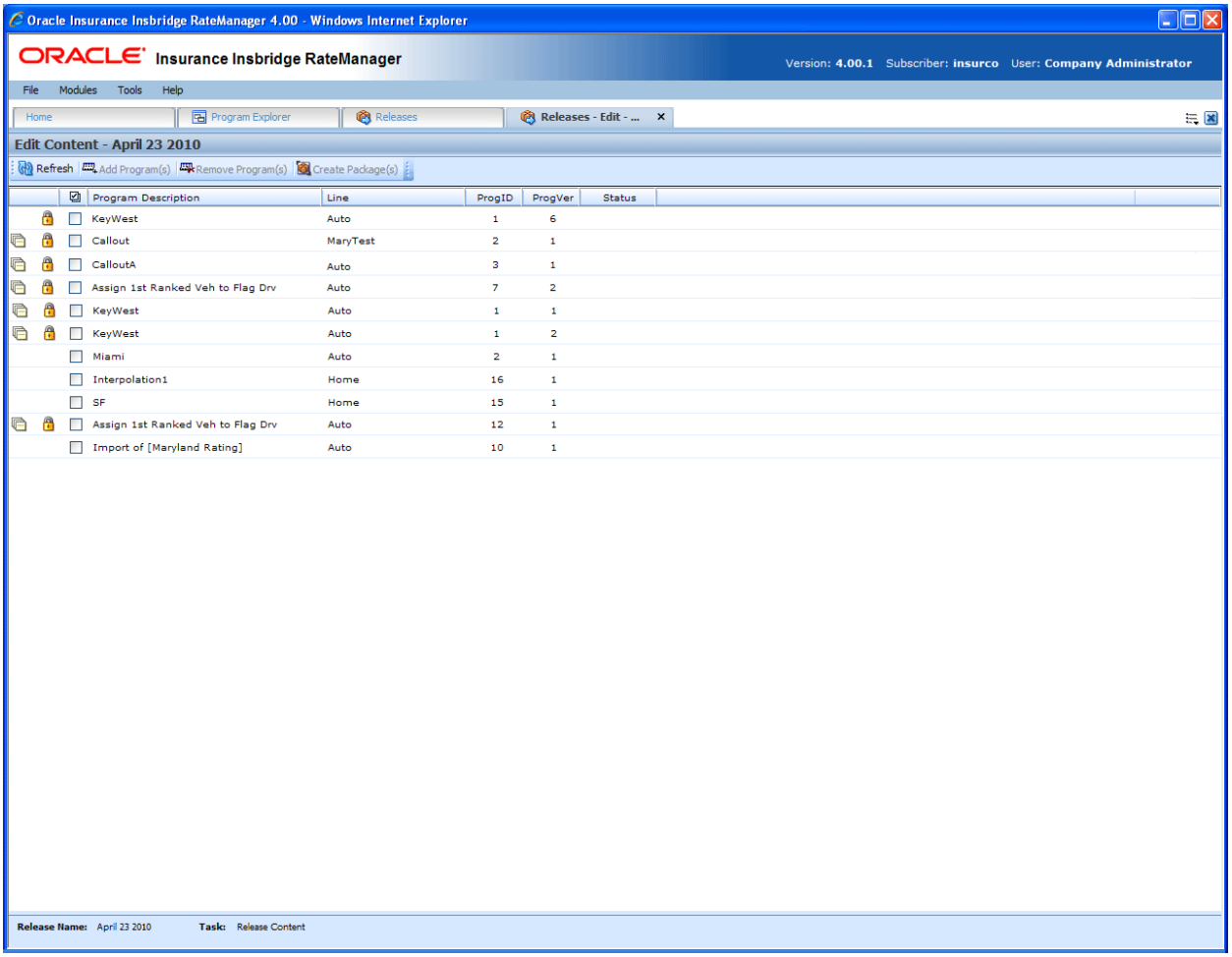
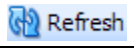
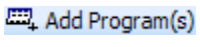
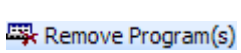
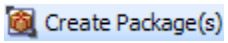


Figure 9 Edit Content for a Release

FUNCTIONALITY

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

Functions:

	**Refresh:** Refreshes the Edit Content window.
	**Add Programs:** Opens the Add Program window. This option will not be displayed on locked releases.
	**Remove Programs:** Removes the selected programs from the release. This option will not be displayed on locked releases.
	**Create Package(s):** Packages the selected program(s) for rating and testing. See Introduction to Packaging for more information. This option will not be displayed on locked releases.

FIELDS

The Edit Content tab displays the programs or packages that are in the releases. There are seven fields in the Edit Content Listing.

Edit Content Listing

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

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

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

Program Desc: The name of the program.

Line: The line of business for a specific program.

ProgID: The unique ID for a specific program.

ProgVer: The version number for a specific program.

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

Right Click Options

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

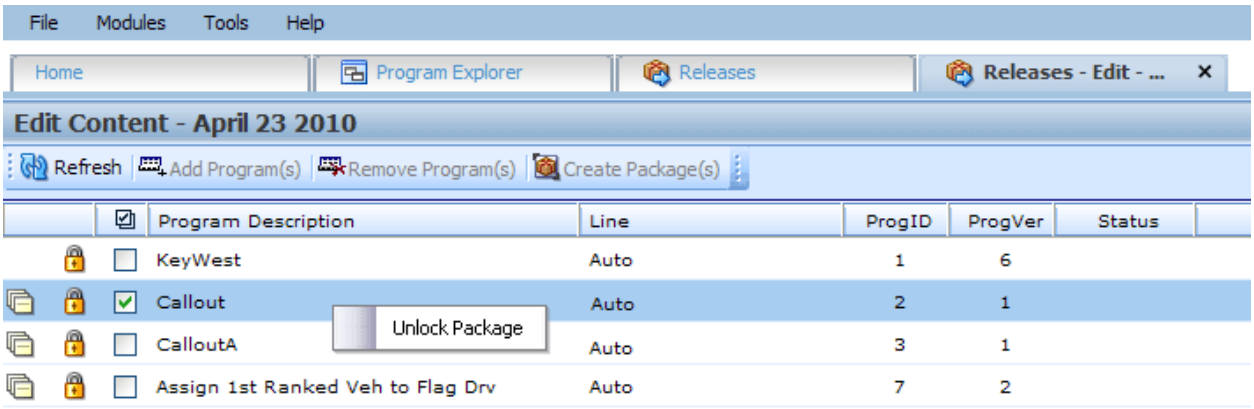


Figure 10 Right Click Menu for the Edit Content Listing

Edit Content Listing has one choice:

- **Lock Package:** Locks the package for the version. This will prevent any editing of the package. The locking applied here will not apply to the version under the subline. Only to the version in the release.

  OR

- **Unlock Package:** Unlocks the package. This will open the program up for editing.

Locking a Package

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

To Lock a Package

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

Adding Programs to a Release

Multiple program versions from different lines of business, both user generated and template generated may be added to a release at any time.

1. To add a program to a release, click **ADD PROGRAMS**. The **Add Programs** screen will be displayed.
2. Expand the line of business you would like. Select the folder and then choose the program. Place a checkmark next to the version or versions you want to add to your program. You also can add global versioning.

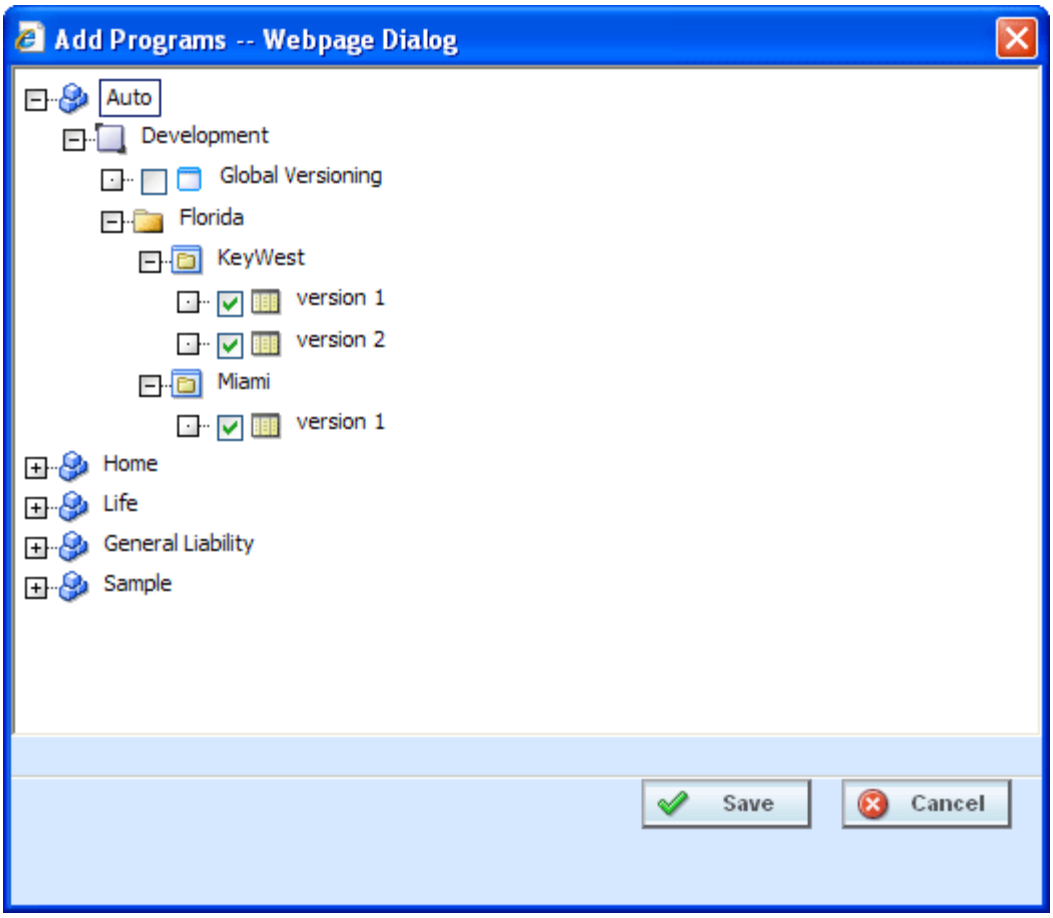


Figure 11 Selecting Versions to Add to a Program

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

Removing a Program

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

Creating Program Packages within a Release

After adding programs to a release, there are 2 ways to create program packages for the release:

1. The Release Administrator may create the packages from the Edit Content tab by selecting the desired programs and clicking **CREATE PACKAGE**.

2. Non-administrator users may create SoftRater (full) packages from the individual program's **Create Package** window in the Program Explorer module. See Introduction to Packaging in the RateManager Users Guide for more information.

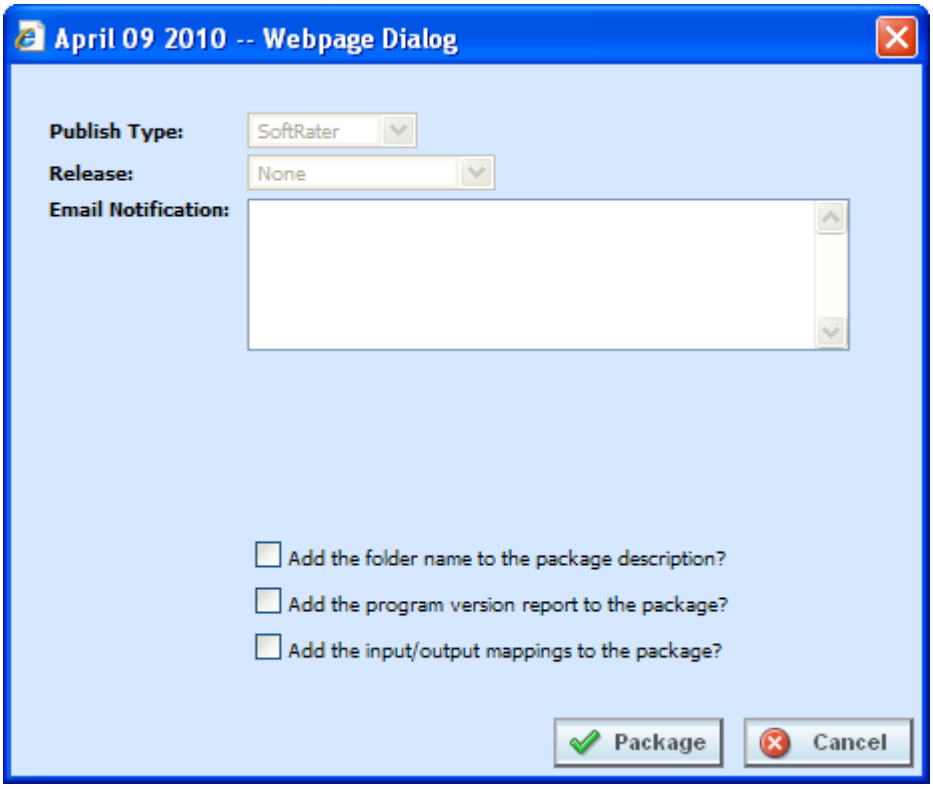


Figure 12 Packaging Programs for a Release

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

PACKAGING

The second sub-tab is Packaging. Packaging is where you can package batches of programs. Batch packaging gives you the ability to create multiple packages simultaneously and asynchronously. When creating packages asynchronously, you will be able to continue other RateManager operations while the system is packaging. You will be notified by email when the batch packaging process is completed.

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

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

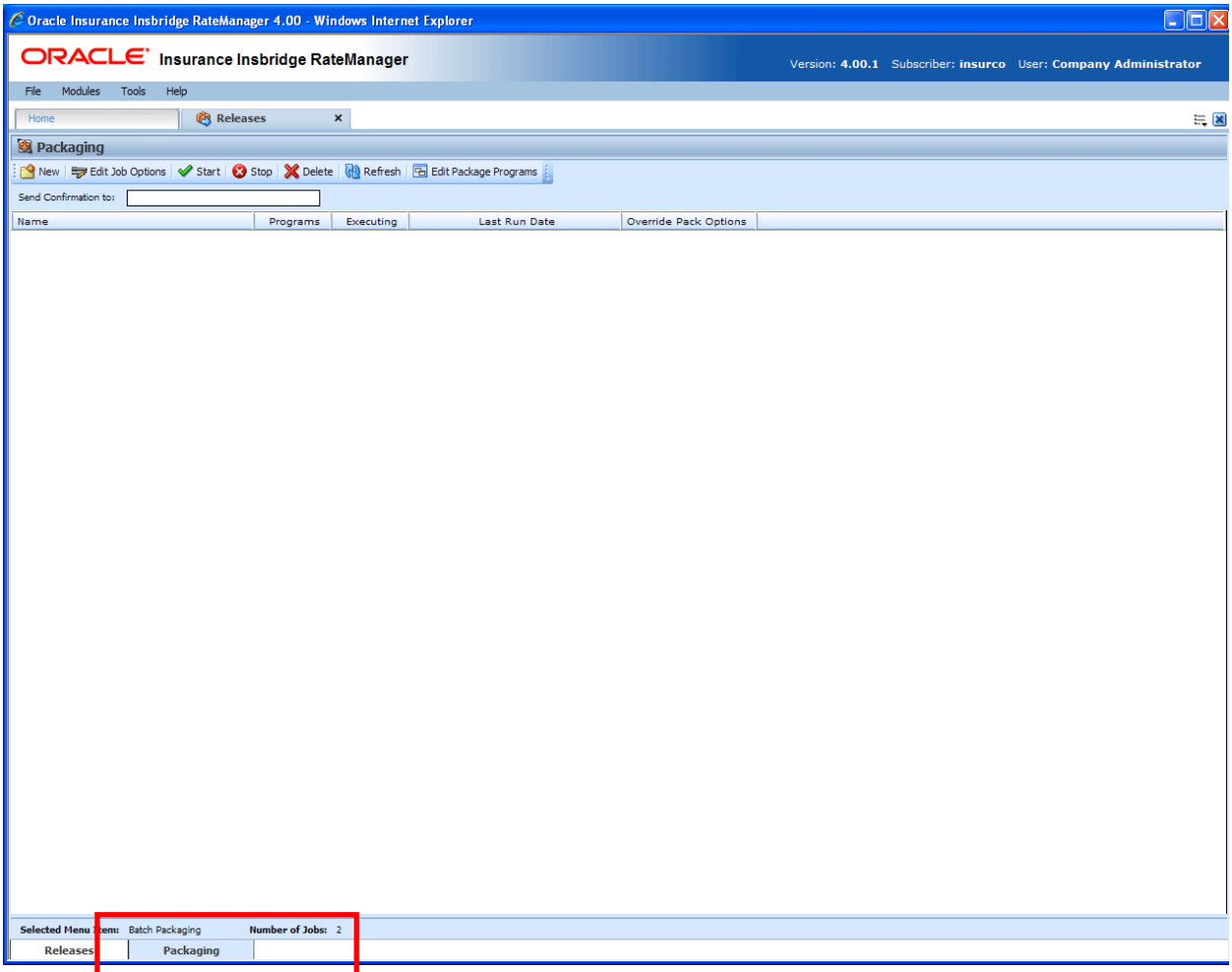
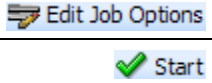
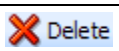
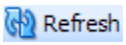
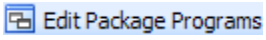


Figure 13 Packaging Sub-Tab

FUNCTIONALITY

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

Functions:

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

FIELDS

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

Packaging Listing:

Shows a listing of packaging jobs. To open a packaging job, double-click it.

Name: The name of the package job.

Programs: The number of programs that packaging job contains.

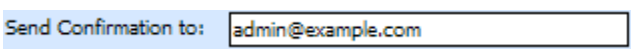
Executing: A checkmark indicates this packaging job is currently running. No checkmark indicates the packaging job is finished.

Last Run Date: Time stamp of when the packaging job was run.

Override Pack Options: A checkmark indicates this packaging job has overridden packaging options. No checkmark indicates the packaging job is using current packaging options.

Definition Options:

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

	**Send Confirmation to:** Enter the email address of the person to be notified when the packaging job is complete. **This is a required field**.

Right Click Options

There are no right click menu options for Packaging.

CREATING A PACKAGING JOB

A packaging job can be created at any time.

To Create a New Packaging Job

1. Select **NEW** from the menu bar. This will open the **New Job** window.

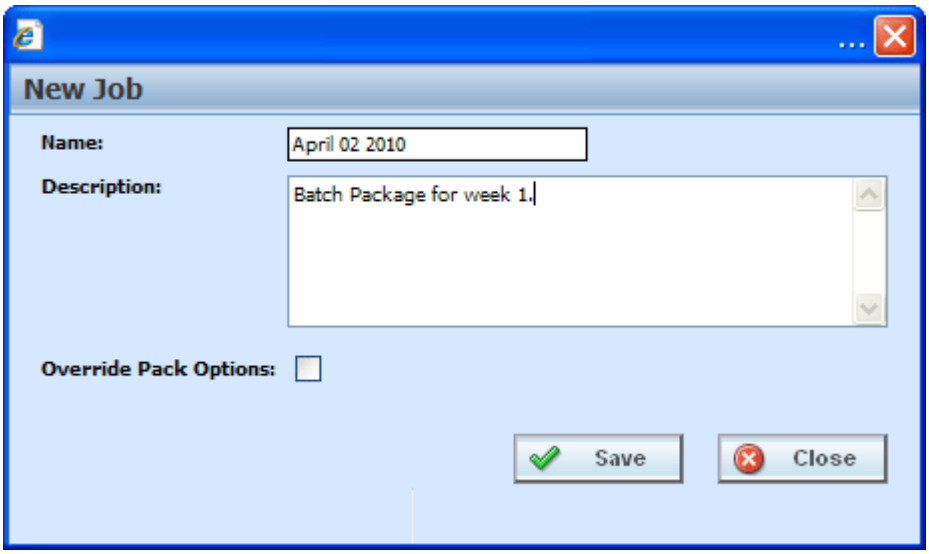


Figure 14 Creating New Job

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

Override Pack Options

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

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

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

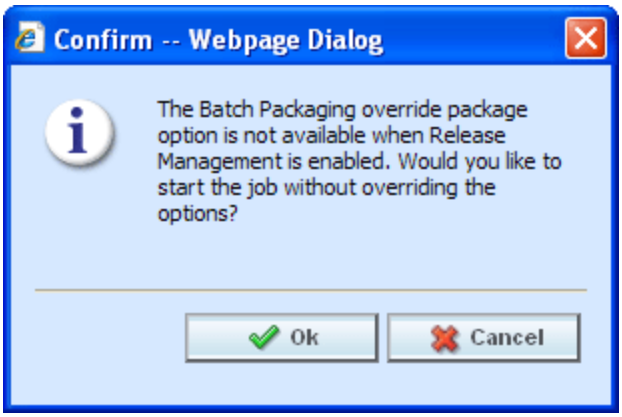


Figure 15 Override Batch Package Options Error

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

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

EDITING A PACKAGING JOB

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

To Edit a Packaging Job

1. Select **EDIT JOB OPTIONS** from the menu bar. This will open the **Edit Job** window.
2. Make any changes and click **SAVE** to save the job.

START A PACKAGING JOB

Once you have created your packaging job, you can start running it. Only one job can be run at a time.

To Start a Packaging Job – No Override

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

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

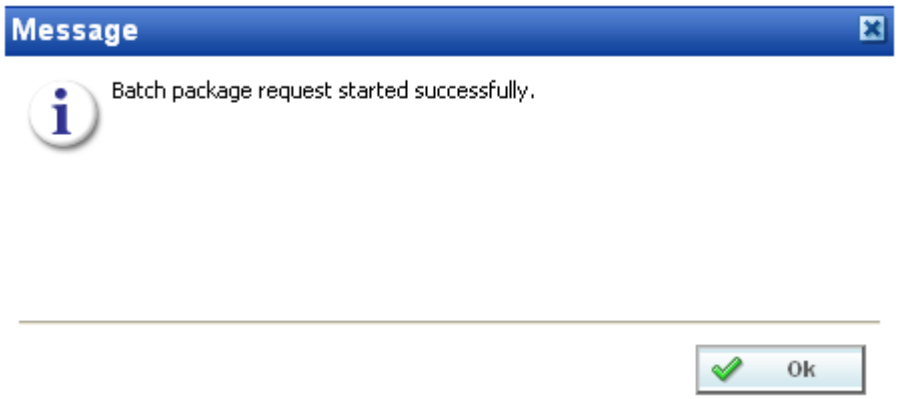


Figure 16 Starting a Batch

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

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

To Start a Packaging Job – Allowing for Override

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

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

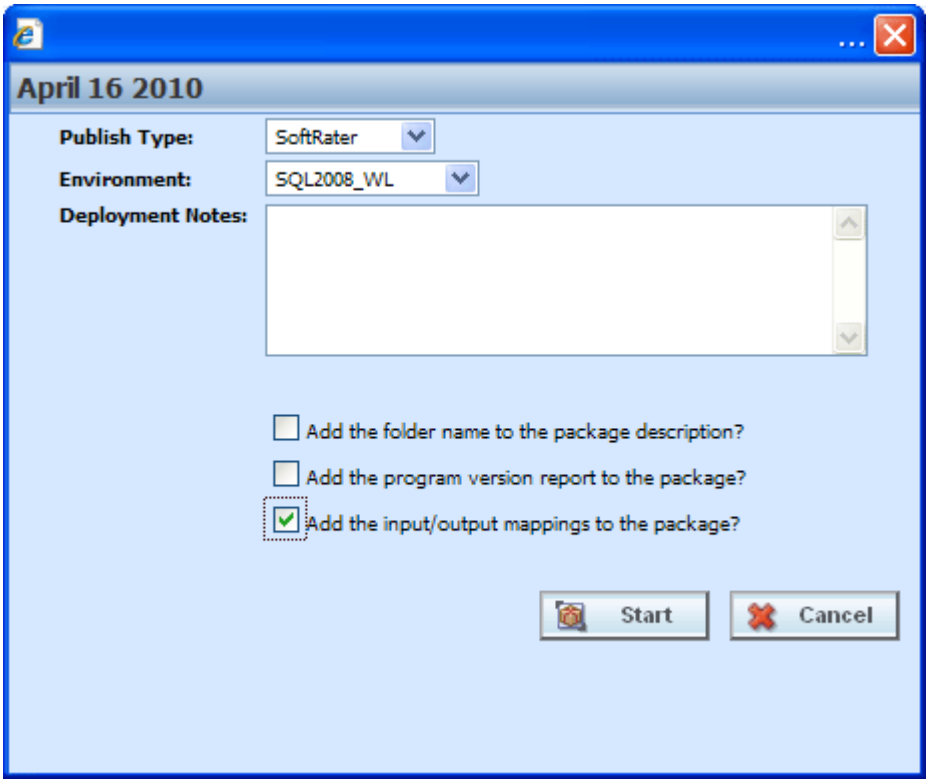


Figure 17 Editing Program Packaging Options Allowing for Override

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

Override Options

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

- RateManager (Local)
- SoftRater (Full)

Environment: If you are creating a SoftRater (full) package, you can select the environment where the package will initially be placed. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created.

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

Add the folder name to full package description? If you are creating a SoftRater (full) package, check this box to add the folder name to the package description. This feature allows IBFA Administrators to differentiate packages.

Add the program version report to the full package? Adds a program version report to the package. A program version report provides the details of a program version.

Add the input/output mappings to the full package? Adds the input/output mappings to the package. If no input/output mappings exist, this option will not be displayed.

3. After you have made your selections, click **START** to start the job.

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

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

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

STOP A PACKAGING JOB

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

To Stop a Packaging Job

1. Select the packaging job you want to stop.

2. Click the **STOP** button. You should receive a message that the batch package request was stopped successfully.

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

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

DELETE A PACKAGING JOB

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

To Delete a Packaging Job

1. On the **Packaging Jobs** screen, select the packaging job you want to delete.
2. Click the **DELETE** button. You should receive a message that the batch package request was stopped successfully.
3. Click **OK** to delete the job or **Cancel** to cancel the request and return to the previous screen.

EDIT PACKAGE PROGRAMS TAB

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

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

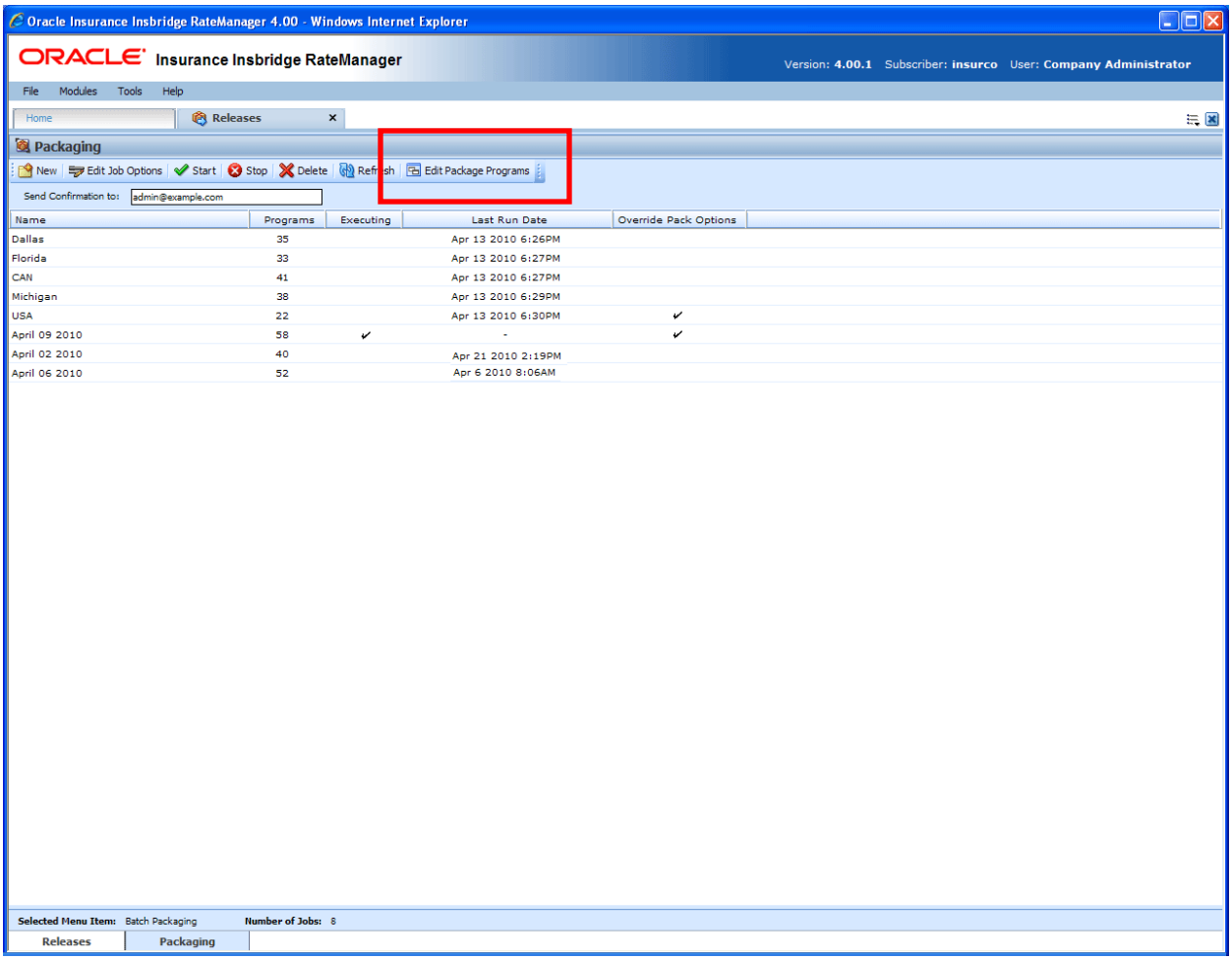


Figure 18 Programs Tab

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

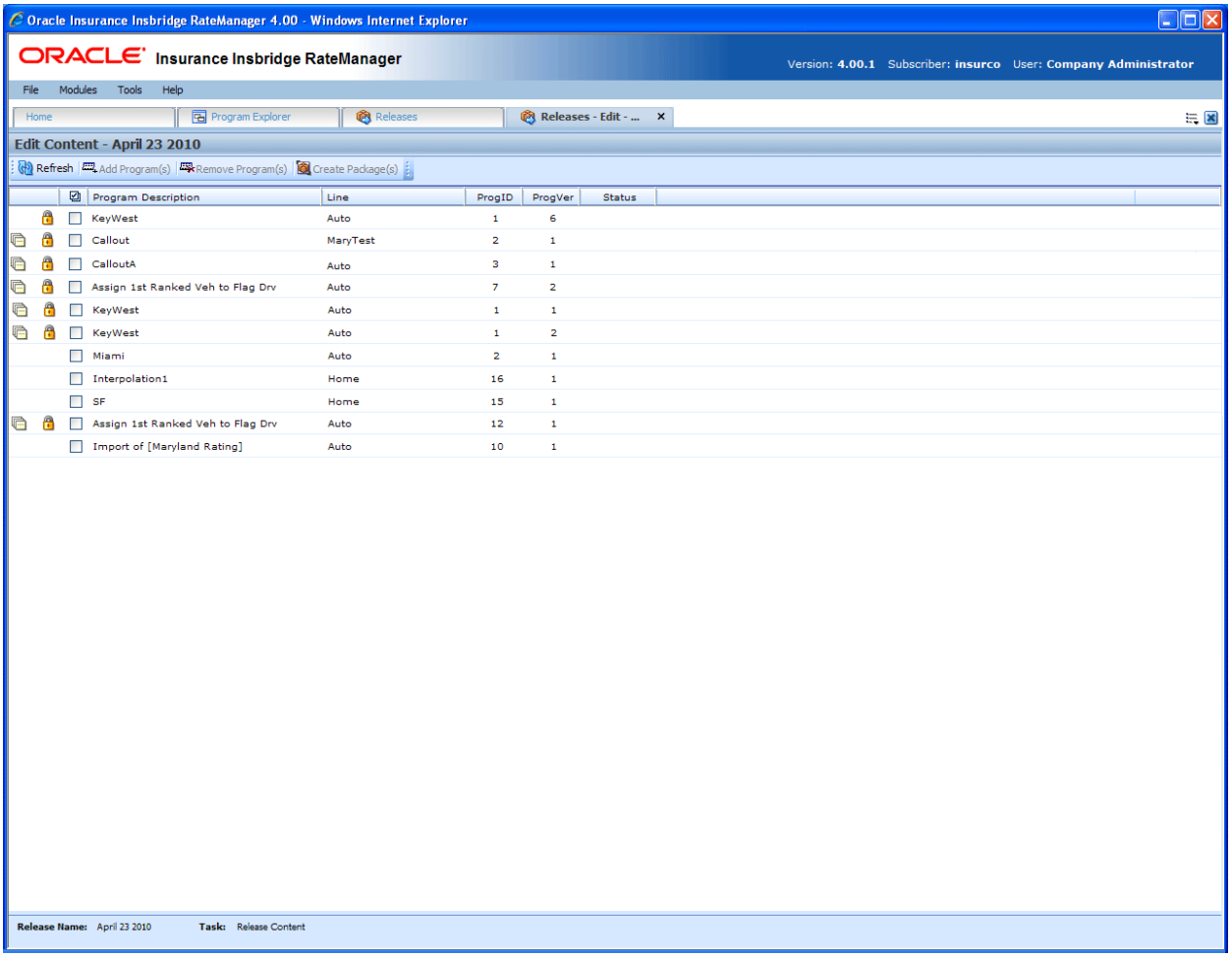


Figure 19 Edit Package Programs

FUNCTIONALITY

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

Functions:

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

FIELDS

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

Edit Package Program Listing

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

Program Desc: The name of the program.

Line: The line of business for a specific program.

ProgID: The unique ID for a specific program.

ProgVer: The version number for a specific program.

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

Right Click Options

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

Adding Programs to a Batch Packaging Job

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

1. To add a program to a packaging job, click **ADD PROGRAMS**. The **Add Programs** screen will be displayed.

2. Expand the line of business you would like. Select the folder and then choose the program. Place a checkmark next to the version or versions you want to add to your packaging job.

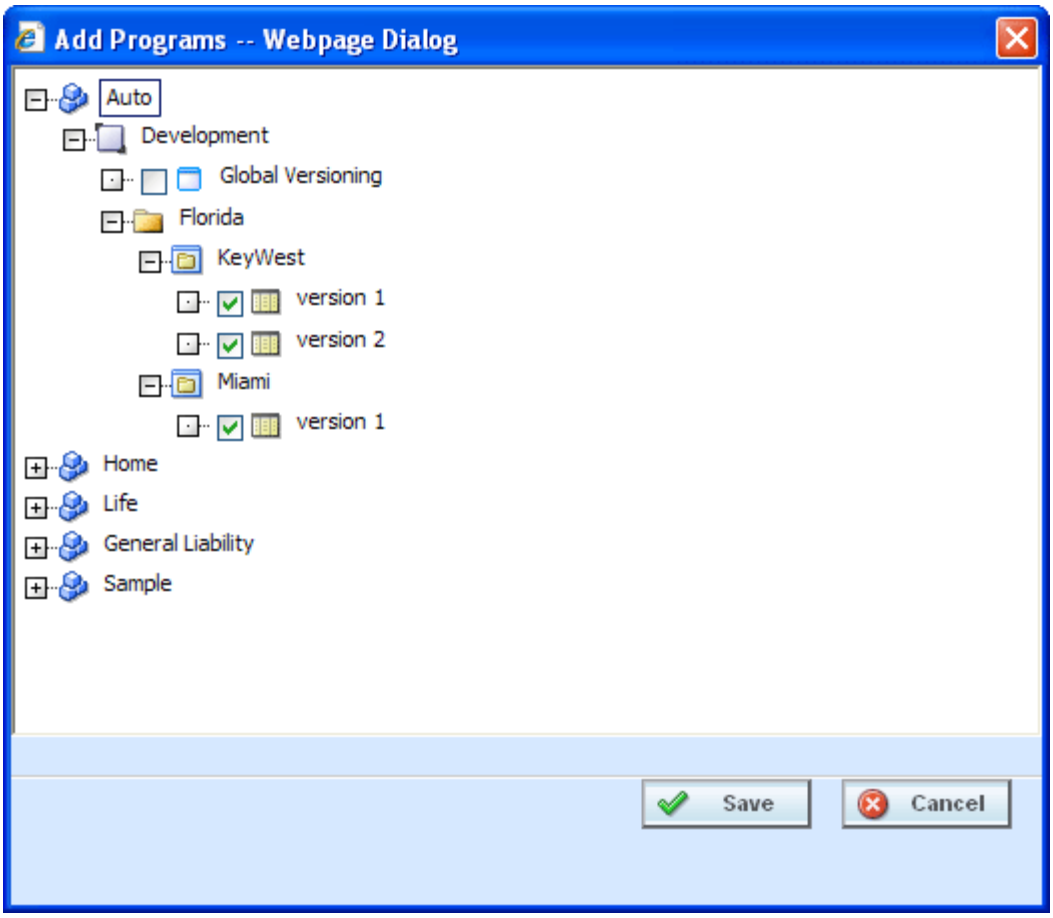


Figure 20 Selecting Versions to Add to a Program

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

Removing a Program

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

Editing Package Options

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

Editing Package Options – Allowing for Override

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

1. Select the program you want to edit and click **EDIT PACKAGE OPTIONS**.

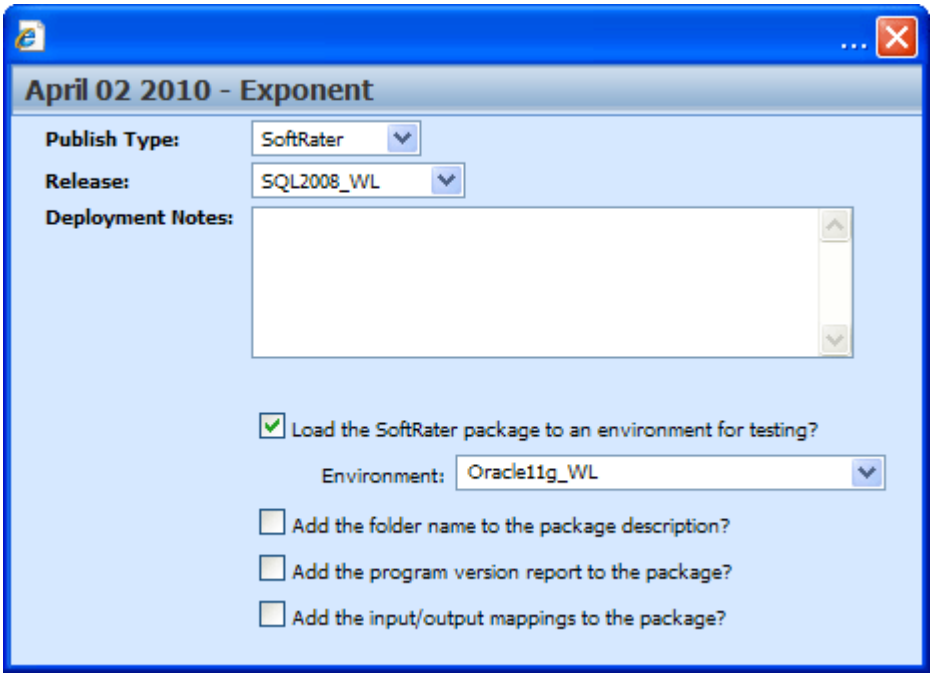


Figure 21 Editing Program Packaging Options Allowing for Override

Screen Options

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

- RateManager (Local)
- SoftRater (Full)

Environment: If you are creating a SoftRater (full) package, you can select the environment where the package will initially be placed. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created.

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

Load SoftRater package to an environment for testing: Check for Yes, leave blank for No.

Environment: Select the environment where you want to load the package for testing.

Add the folder name to full package description? If you are creating a SoftRater (full) package, check this box to add the folder name to the package description. This feature allows IBFA Administrators to differentiate packages.

Add the program version report to the full package? Adds a program version report to the package. A program version report provides the details of a program version.

Add the input/output mappings to the full package? Adds the input/output mappings to the full package. If no input/output mappings exist, this option will not be displayed.

2. When you have finished setting the packaging options, click **SAVE**.

3. You can edit as many packages as you need. When you are finished editing programs, click back over to the Packaging Jobs tab. Your job can be packaged now.

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

Editing Package Options – Not Allowing for Override

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

1. Select the program you want to edit and click **EDIT PACKAGE OPTIONS**.

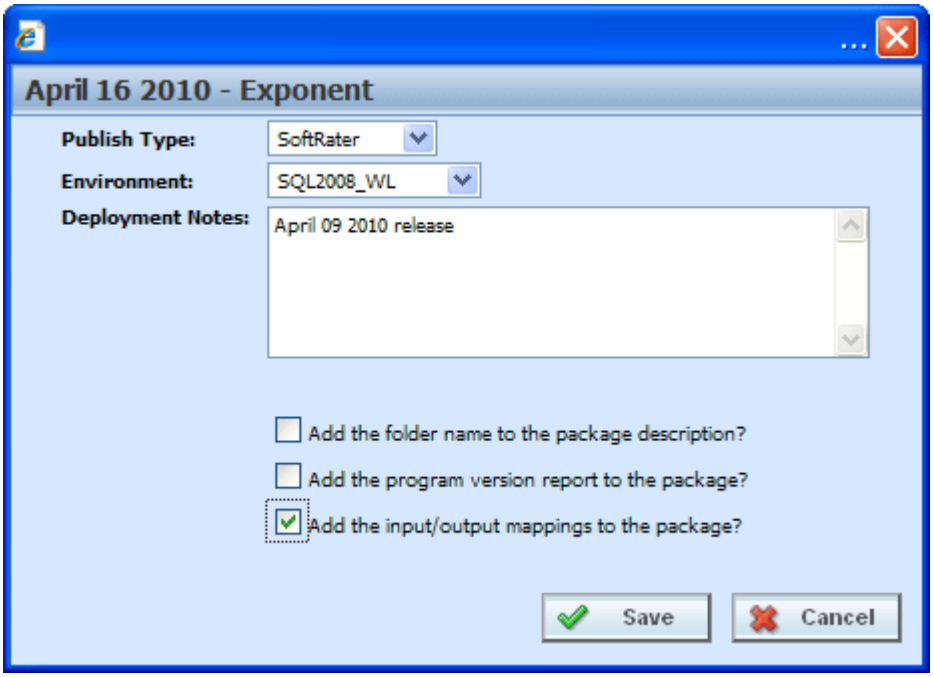


Figure 22 Editing Program Packaging Options Not Allowing for Override

Override Options

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

- RateManager (Local)
- SoftRater (Full)

Environment: If you are creating a SoftRater (full) package, you can select the environment where the package will initially be placed. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created.

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

Add the folder name to full package description? If you are creating a SoftRater (full) package, check this box to add the folder name to the package description. This feature allows IBFA Administrators to differentiate packages.

Add the program version report to the full package? Adds a program version report to the package. A program version report provides the details of a program version.

Add the input/output mappings to the full package? Adds the input/output mappings to the package. If no input/output mappings exist, this option will not be displayed.

2. When you have finished setting the packaging options, click **SAVE**.

3. You can edit as many packages as you need. When you are finished editing programs, click back over to the Packaging Jobs tab. Your job can be packaged now.

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

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

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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.
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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