

Oracle Insurance

**Insbridge Rating and
Underwriting
SoftRater Batch XML
Format User Guide**

Release 4.1

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Oracle Insurance Insbridge Rating and Underwriting SoftRater Batch XML Format User Guide

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INSBRIDGE SOFTRATER BATCH

Batch rating allows for a directory of files or a large single file to be submitted for rating, testing or pricing analysis. Batches can be run from inside of RateManager on the Impact Analysis screen or submitted from outside of RateManager using any submission application chosen or designed by you.

- Generally, testing and pricing analysis are run from inside RateManager.
- A batch submitted outside of RateManger is generally for bulk rating or rating that needs to be passed through to other systems.

RateManager (Impact Analysis) can accept either a custom XML file or an Insbridge XML file. When you submit a custom file in RateManger (Impact Analysis), the file will be converted to Insbridge XML and will be returned in Insbridge XML.

A custom file can be submitted using an external process. When submitting a batch request outside of RateManager, the batch result file can be returned as custom XML. If you need custom XML returned from the batch, you must use a custom submission process.

There are some differences between batches submitted inside RateManger and batches submitted outside of RateManager.

Differences

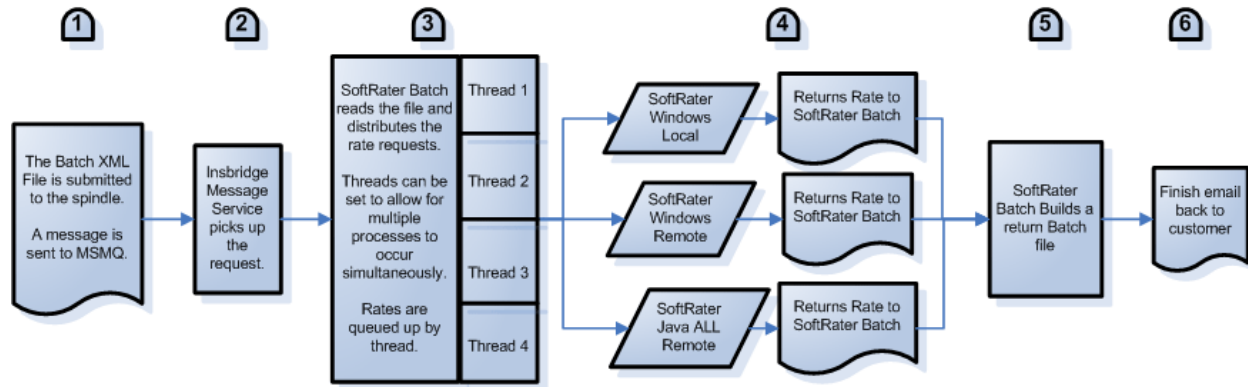
	Inside RateManager	Outside RateManager
File Locations:	The submitting file can be located on any share that the Insbridge user* has access to. The result file will be placed locally on the RateManager machine.	The submitting file can be located on any share that the Insbridge user* has access to. The result file will be placed on any share that the Insbridge user has access to. The result file location must be specified in the submission.
File Types:	A custom XML file or and Insbridge XML file are allowed. The result file will be in Insbridge XML.	A custom XML file or and Insbridge XML file are allowed. The result file will be in Insbridge XML if specified in the submission. If you require the result XML file in another format, you must use the Outside RateManager method.
Submission Method:	Batches can be submitted from Impact Analysis, Batch Files tab.	Batches can be submitted using any submission application chosen or developed by the customer.

NOTE: * The Insbridge user is the user that was setup to run the installation of Insbridge Rating and Underwriting. Most instances of the Insbridge Rating and Underwriting system are set up to run under the Insbridge user. To verify that the Insbridge user is running, check the Insbridge Message service to see the user designated.

NOTE: If you want to use Impact Analysis to run pricing scenarios, the file must be in Insbridge XML and you will have to use RateManager to submit the file.

BATCH PROCESS

Insbridge Batch XML Process



1. Batch is submitted:
 - a. **Through RateManager:** Enter Impact Analysis and submit batch.
 - b. **Custom:** The request to batch the file is submitted to the web service end point (spindle). The submission mechanism can be any submission application chosen or designed by the customer. Once the spindle has the request, the request is sent to MSMQ.
2. The Insbridge Message Service picks up the request and routes to the SoftRater Batch,.
3. The file is read and processed.
 - a. Rates are queued up by threads. The number threads that SoftRater uses can be set in IBFA. This will allow for multiple rates to be processed at the same time.
 - b. The requests are distributed to the rating environment designated in the file. The target environment can be specified for individual files or the entire batch.
 - c. All SoftRater environments can be used. Windows or Java, local or remote engines all can be utilized simultaneously.
4. The rating environments return results to the SoftRater Batch. Results are gathered in the order in which they were processed. This may not be the order in which they are in the request file.
5. SoftRater Batch builds the result file and places the file in the directory specified in the batch request.
6. An email is sent to the address specified if SMTP has been properly configured. The email will state that the batch file process is finished.

PREPARATION

IBFA must be prepared to receive and process batch files. 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](#)".

On the IBFA that will receive the batch:

- The batch file is located on a share that the Insbridge user can access. This may require permissions to be set on the share file to allow the Insbridge user access.
- If necessary, set the thread count. Threading enables a process to finish faster by splitting the process into smaller processes that run quasi-simultaneously. Thread settings for Batches are located in IBFA on the Services page. Click the **Edit Process Configuration** button and enter the number of threads you want.
- On the Services page in IBFA, verify that the Insbridge Message Service has been started.
- Verify that MSMQ is running.
- Verify that all necessary batch environments have been set up.

NOTE: *If you are rating with a Java engine (IBSS), you will need to set up an IBFA to receive and reroute the request to the Java engine (IBSS).*

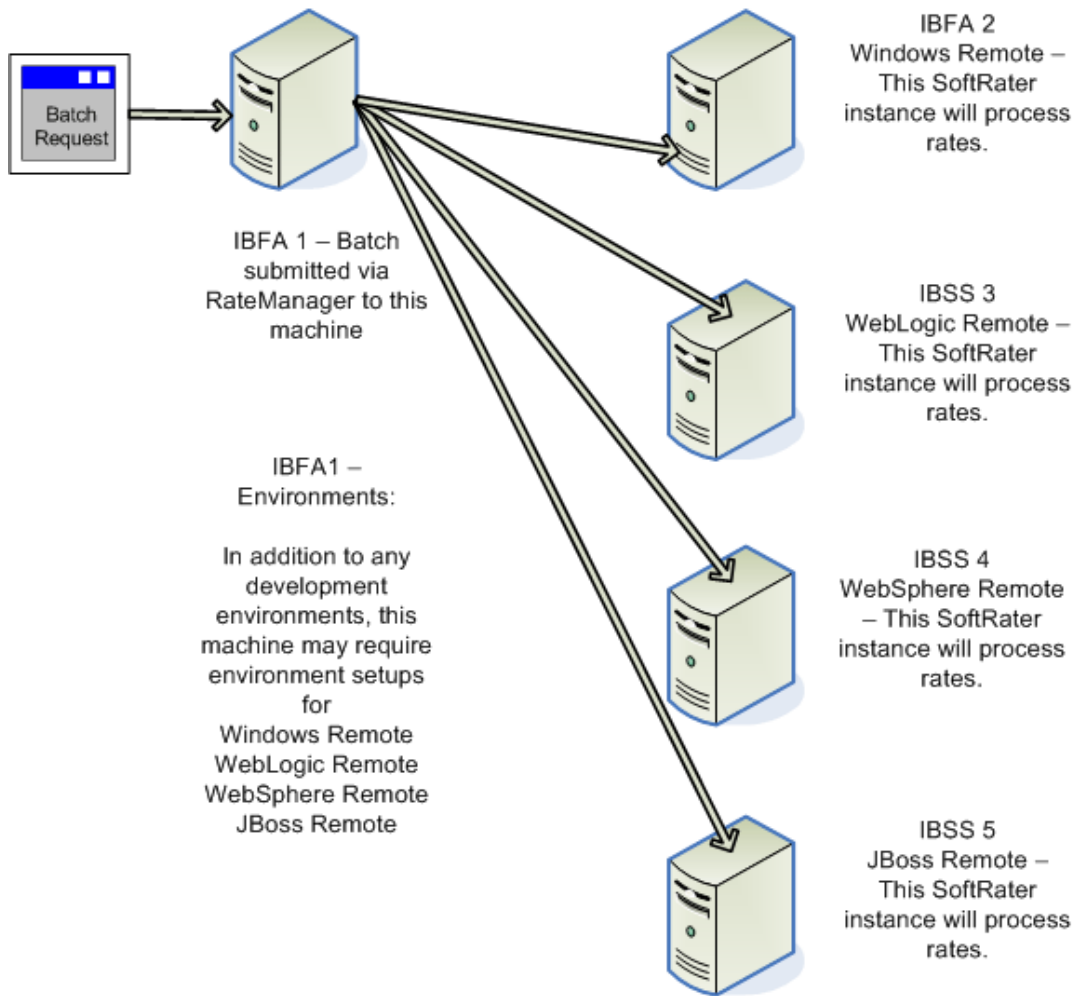
On the IBFA and/or IBSS that will rate the batch:

- If you are in a Windows only environment, this can be the same IBFA that receives the batch.
- Verify that all necessary batch environments have been set up.
- The result batch file is placed on a share that the Insbridge user can access. This may require permissions to be set on the share file to allow the Insbridge user access.

Batching Environments

Batching environments may be different from the rating and development environments that are typically set up. Environments must be created on the IBFA or IBSS that will be performing the rating and on the IBFA that will be sending (routing) the rating request. This will allow the SoftRater batch to send (route) requests to the local and remote machines to process and for the receiving machine to process that batch.

In the batch rate request the rating environments can be specified at the file level or for the entire batch. Setting the rating environment for each file (request) will allow you to rate against one or more environments.



CREATING A CUSTOM BATCH FILE

Custom batch files can be created in any XML program. The batch file must contain:

- The files to be rated. This can be one large XML file or a directory of XML files. Directories can be signified by *.xml.
- The name of the result file and the location where the result file should be placed.
- An email address for the person who needs to be notified when the batch process is finished.

The file should be placed anywhere that can be accessed by the Insbridge user.

SoftRaterBatch.XML

SoftRaterBatch.XML is designed to provide the maximum amount of integration flexibility while maintain a high level of operational efficiency for the SoftRater Batch rating application. Please see the BatchRating.xsd file for a more detailed explanation of the request document.

The BatchRating.xsd file is located on the machine where Insbridge was initially installed:

- [DRIVE]:\Program Files\Oracle\IGBU\Insbridge\Framework\3.5.0 – If the initial installation was release 3.13 or 4.0.
- [DRIVE]:\Program Files\Oracle\IGBU\Insbridge\Framework\2.0.0 – If the initial installation was release 3.12.
- [DRIVE]:\Program Files\Insbridge\Framework\2.0.0 – If the initial installation was release 3.11 or previous.

Data Request

Example:

```
<batch xmlns='urn:batchmessage-schema'>
<request rsltFile='Share\BatchResults\FileName' name='Ohio' heading='1'
requestor_email='john.doe@example.com' heading='0' inputs='0' root='1'
result_desc='1' empty_results='0' remove_input_file='0'
detail_email='1' newline_seperator='0'>
  <contact name='John Doe' email='john.doe@example.com' />
  <file location='C:\Batch\Insbridge\Rating\XML\Auto.xml'></file>
  <processor type='in' path='c:\in.xslt'>
    <param name='version' value='1.0' />
  </processor>
</request>
</batch>
```

Definitions:

ELEMENT	DATA TYPE	DESCRIPTION	REQUIRED
<batch>		Insbridge document namespace node.	Y
<request>		Batch request node.	Y
rsltFile	String	Result file that the process will add the SoftRater Batch results to.	Y45
name	String	Friendly name for the request.	Y
requestor_email	String	Email address of the SoftRater Batch requestor.	N
heading	Long	Add company descriptions to the results.	N
inputs	Long	Add program inputs passed in for rating to the results.	N
root	Long	Add root node to the results.	N
result_desc	Long	Add descriptions to the result items.	N
empty_results	Long	Include empty result items.	N
remove_input_file	Long	Delete rating input file.	N
encoding	Long	Encode results.	N
detail_email	Long	Add details to response email.	N

ELEMENT	DATA TYPE	DESCRIPTION	REQUIRED
<code>remove_temp_file</code>	Long	Delete temporary files.	N
<code>newline_seperator</code>	Long	Add newline return at the end of each result. By default the value is set to '0', which means no newline after each result. If you want newline to be added, please set to '1'.	N
<contact>		Contact target node.	N
name	String	Name of the contact.	N
email	String	Email address of the contact.	Y
<file>		File target node.	Y
location	String	SoftRater Batch rating input file.	Y
tag	String	Element tagname for the root element of each custom rating input file.	Y
<processor>		SoftRater Batch request custom in and/or out processing.	N
type	String	Value must be either 'in' or 'out'.	Y
path	String	Location of the XSLT processor.	Y
<param>		SoftRater Batch request custom in and/or out processing params.	N
name	String	Name of the XSLT param.	Y
value	String	Value of the XSLT param.	Y

Data Submittal

The Insbridge Framework Administrator Messaging WebService allows customers to submit long-lasting requests to Insbridge Message Processes via a HTTP transport. A WSDL is available from the Insbridge Framework Administrator Web. A successful message submittal will return "True" as its return result.

<http://localhost/ibfa/Spindle.asmx?wsdl>

Definitions: ProcessMessage

PERAMETER	DATA TYPE	DESCRIPTION	OPTIONAL
Label	String	Insbridge document namespace node.	N
Process	String	Process Identifier. The value for batch rating is "BATCHRATE".	N
Message	String	Batch Rate schema validated request.	N

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:

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