ORACLE
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Oracle Insurance

Insbridge Rating and Underwriting

Framework Administrator User Guide

Release 4.1

December 2010

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Oracle Insurance Insbridge Rating and Underwriting Framework Administrator User Guide

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CONTENTS

PREFACE....9
Audience....9
Related Documents....9
Conventions....9
System Requirements....10
Manual History....10

CHAPTER 1

INSBRIDGE FRAMEWORK ADMINISTRATOR....11

CHAPTER 2

INTRODUCTION TO THE INSBRIDGE PAGE....12
Subscribers....13
Adding a Subscriber....13
Database Connection....17
Configuration File....21

CHAPTER 3

INTRODUCTION TO THE SOFTRATER PAGE....24
SoftRater Test Interface....24
Rating a File Using the SoftRater Test Interface....25
Optional Rate Operators....26
Optional Map Request Operators....28

CHAPTER 4

SOFTRATER ENGINE....30
Engine Type....31
Custom Engine Types....33

CHAPTER 5

SOFTRATER EXPLORER....35
Explorer Configuration Page....35
Settings Tab....37
Configuration Subtab....38
Environments....38
Line of Business Management....41
Virtual File Server Management....44
Environments Subtab....49
Content Tab....56

CHAPTER 6

PACKAGES 58
Functionality 59
Fields 59
Downloading Packages 62
Loading Packages 63
Unloading Packages 66
Moving Packages 68
Copying Packages 69
Deleting Packages 71
Compare SRP Report 73
Viewing Package Details 76
Searching for Packages 79

CHAPTER 7

BACKUPS 81
Functionality 82
Fields 82
Creating a Backup 83
Save to File 86
Delete Backups 89
Show Details 91
View Environment Report 92

CHAPTER 8

SOFTDATA TEST INTERFACE 94

CHAPTER 9

SERVICES 96
Introduction to the Insbridge Message Service 97
Starting & Stopping the Message Service 97
OBI Publisher 98
Viewing Messages 98
Deleting Messages 100
Process Configuration 102
Introduction to Insbridge Task Manager 103
Starting & Stopping Task Manager 103

CHAPTER 10

LOGS 105
Error Log 105
Database Events 106
Event Log Events 108
Introduction to the Audit Log 111

CHAPTER 11

SECURITY 113
Changing the Type of Authentication Used 113
Windows Authentication 114
Custom Authentication 115
External API Access 116
Changing the Password 117

CHAPTER 12

SOFTLIBRARIES 118
Adding SoftLibraries 120
Editing SoftLibraries 128
Deleting SoftLibraries 128
Searching for a SoftLibrary 128

NOTICE

SOFTRATER UPDATES 129

SUPPORT

CONTACTING SUPPORT 130
TTY Access to Oracle Support Services 130

GLOSSARY

GLOSSARY TERMS 131

INDEX

INDEX 136

LIST OF FIGURES

FIGURE 1 INSBRIDGE FRAMEWORK ADMINISTRATOR MAIN SCREEN 11
FIGURE 2 INSBRIDGE PAGE 12
FIGURE 3 ADDING SUBSCRIBER LINKS 13
FIGURE 4 ADDING A NEW SUBSCRIBER 14
FIGURE 5 SUBSCRIBER LIST 14
FIGURE 6 SUBSCRIBER LIST 15
FIGURE 7 DELETING A SUBSCRIBER 16
FIGURE 8 CONFIRM DELETED SUBSCRIBER 16
FIGURE 9 ADDING DATABASE LINK 17
FIGURE 10 ADDING A NEW DATABASE 18
FIGURE 11 DATABASE LIST 19
FIGURE 12 EDIT DATABASE WINDOW 20
FIGURE 13 CONFIRM DELETING DATABASE 20
FIGURE 14 INSBRIDGE PAGE CONFIGURATION FILE PATH 21
FIGURE 15 CONFIGURATION FILE NEW WINDOW 22
FIGURE 16 CHANGING LOCATION OF CONFIGURATION FILE 23
FIGURE 17 SOFTRATER TEST INTERFACE 25
FIGURE 18 TEST RESULTS 26
FIGURE 19 OPTIONAL RATE OPERATORS 26
FIGURE 20 CUSTOM XML MAP REQUEST OPERATORS 28
FIGURE 21 SOFTRATER ENGINE CONFIGURATION PAGE 31
FIGURE 22 CUSTOM ENGINE TYPES 33
FIGURE 23 EXPLORER CONFIGURATION PAGE 36
FIGURE 24 SUBSCRIBER SETTINGS TAB 37
FIGURE 25 ENVIRONMENT LISTING SUBTAB 38
FIGURE 26 ADDING AN ENVIRONMENT 39
FIGURE 27 ENVIRONMENT LIST 40
FIGURE 28 EDIT ENVIRONMENT 40
FIGURE 29 CONFIRM DELETE OF ENVIRONMENT 40
FIGURE 30 LINE OF BUSINESS MANAGEMENT 41
FIGURE 31 ADDING A LINE OF BUSINESS 41
FIGURE 32 LINE OF BUSINESS MANAGEMENT SCREEN 42
FIGURE 33 SELECTING A LINE OF BUSINESS TO DELETE 43
FIGURE 34 VIRTUAL FILE SERVER MANAGEMENT SCREEN 44
FIGURE 35 VIRTUAL FILE SERVER MANAGEMENT WINDOW 44
FIGURE 36 VIRTUAL FILE SERVER MANAGEMENT 45
FIGURE 37 EDITING VIRTUAL FILE SERVER MANAGEMENT 45
FIGURE 38 VIRTUAL FILE SERVER MANAGEMENT SCREEN 46
FIGURE 39 DELETING VIRTUAL SERVER ON POPUP 46
FIGURE 40 CONFIRMING DELETING OF A VIRTUAL FILE SERVER MANAGEMENT 47
FIGURE 41 VIRTUAL FILE SERVER MANAGEMENT 47
FIGURE 42 DELETING A VIRTUAL FILE SERVER 48
FIGURE 43 CONFIGURATION SUBTAB FOR CONFIGURING AN ENVIRONMENT 49
FIGURE 44 CONFIGURING AN ENVIRONMENT 50
FIGURE 45 ORACLE XE MESSAGE 53
FIGURE 46 TEST ENVIRONMENT 54
FIGURE 47 DISCOVER ENVIRONMENT 55
FIGURE 48 SOFTRATER EXPLORER – CONTENT TAB 57
FIGURE 49 SOFTRATER PACKAGES 58
FIGURE 50 RIGHT CLICK MENU FOR THE PACKAGES SUBTAB 60
FIGURE 51 SELECTING PACKAGES TO DOWNLOAD 62
FIGURE 52 DOWNLOAD PACKAGE RESULTS 63
FIGURE 53 SELECTING PACKAGES 64

FIGURE 54 LOADING A PACKAGE 64
FIGURE 55 LOAD PACKAGES RESULTS 65
FIGURE 56 SELECTING PACKAGES TO UNLOAD 66
FIGURE 57 UNLOADING SOFTRATER PACKAGES 67
FIGURE 58 DOWNLOAD PACKAGE RESULTS 67
FIGURE 59 SELECTING PACKAGES TO MOVE 68
FIGURE 60 MOVING SOFTRATER PACKAGES 69
FIGURE 61 SELECTING PACKAGES TO COPY 70
FIGURE 62 COPYING SOFTRATER PACKAGES 70
FIGURE 63 SELECTING A PACKAGE TO DELETE 71
FIGURE 64 DELETING SOFTRATER PACKAGES RESULTS 72
FIGURE 65 COMPARING PACKAGES 73
FIGURE 66 PROGRAM DIFFERENCE REPORT SELECT 74
FIGURE 67 COMPLETED PROGRAM DIFFERENCE REPORT 75
FIGURE 68 PROGRAM DIFFERENCE REPORT 76
FIGURE 69 SELECTING A PACKAGE TO VIEW DETAILS 77
FIGURE 70 RELEASE DETAILS 78
FIGURE 71 SEARCHING FOR A PACKAGE 79
FIGURE 72 BACKUPS 81
FIGURE 73 RIGHT CLICK MENU FOR THE BACKUPS SUBTAB 83
FIGURE 74 CREATING A BACKUP 84
FIGURE 75 SELECTING AN ADMIN WHEN CREATING A BACKUP 85
FIGURE 76 SAVE TO FILE SELECT 86
FIGURE 77 CREATING A BACKUP ZIP 87
FIGURE 78 SAVING A BACKUP ZIP FILE 87
FIGURE 79 BACKUP FILE CONTENTS 88
FIGURE 80 SELECTING TO DELETE A BACKUP 89
FIGURE 81 DELETING A BACKUP 90
FIGURE 82 SHOW DETAILS 91
FIGURE 83 ENVIRONMENT REPORT 92
FIGURE 84 SOFTDATA TEST INTERFACE 94
FIGURE 85 TEST RESULTS 95
FIGURE 86 INSBRIDGE SERVICES SCREEN 96
FIGURE 87 INSBRIDGE SERVICES SCREEN 97
FIGURE 88 INSBRIDGE SERVICES SCREEN 99
FIGURE 89 INSBRIDGE MESSAGE SERVICE 99
FIGURE 90 BATCH MESSAGE INFORMATION 100
FIGURE 91 INSBRIDGE SERVICES SCREEN 101
FIGURE 92 INSBRIDGE MESSAGE SERVICE 101
FIGURE 93 INSBRIDGE SERVICES SCREEN 102
FIGURE 94 PROCESS CONFIGURATION WINDOW 103
FIGURE 95 INSBRIDGE TASK MANAGER 104
FIGURE 96 INSBRIDGE ERROR LOG 106
FIGURE 97 INSBRIDGE ERROR LOG 107
FIGURE 98 INSBRIDGE DATABASE EVENTS 107
FIGURE 99 EMAILING AN EVENT 108
FIGURE 100 INSBRIDGE ERROR LOG 109
FIGURE 101 INSBRIDGE EVENT LOG EVENT 110
FIGURE 102 EMAILING AN EVENT 111
FIGURE 103 AUDIT LOG 112
FIGURE 105 INSBRIDGE SECURITY PAGE 114
FIGURE 106 LOGGING INTO FRAMEWORK ADMINISTRATOR 115
FIGURE 107 ALLOWING EXTERNAL API ACCESS 116
FIGURE 108 CHANGING YOUR PASSWORD 117
FIGURE 109 SOFTLIBRARY MAIN PAGE 118
FIGURE 110 SOFTLIBRARY IMPLEMENTATION INFORMATION 119

FIGURE 111 SOFTLIBRARY WEB SERVICES 120
FIGURE 112 SOFTLIBRARY SCREEN 121
FIGURE 113 COMPLETED SOFTLIBRARY SCREEN 122
FIGURE 114 ARGUMENTS SCREEN 123
FIGURE 115 GETHELPTEXT SCREEN 124
FIGURE 116 REQUESTXML SCREEN 124
FIGURE 117 RESPONSEXML SCREEN 125
FIGURE 118 PING SCREEN 125
FIGURE 119 GETLOG SCREEN 126
FIGURE 120 TEST SCREEN – REQUEST 126
FIGURE 121 TEST SCREEN – RESPONSE 127
FIGURE 122 COMPLETED SOFTLIBRARY 127
FIGURE 123 SOFTLIBRARY TYPE SEARCH 128

PREFACE

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

IBFA may also be referred to as SoftRater for Windows.

AUDIENCE

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

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 SoftRater User Guide.
- You can view these guides in-line at this address:

  http://www.oracle.com/technetwork/documentation/insurance-097481.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	P01-753-01	V 3.5	November 2005	
2nd Edition	P01-753-02	V 3.6	June 2006	Update
3rd Edition	P01-753-03	V 3.7	December 2006	Update Version
4th Edition	P01-753-04	V 3.8	July 2007	Update Version
5th Edition	P01-753-05	V 3.8.3	October 2007	Update Version
6th Edition	P01-753-06	V 3.8.5	November 2007	Update Version
7th Edition	P01-753-07	V 3.8.7	January 2008	Update Version
8th Edition	P01-753-08	V 3.8.8	March 2008	Update Version
9th Edition	P01-753-09	V 3.9	May 2008	Update Version
10th Edition	P01-753-10	V 3.10	October 2008	Update Version
11th Edition	P01-753-11	V 3.11	December 2008	Update Version
12th Edition	P01-753-12	V 3.12	July 2009	Update Version
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15th Edition	P01-753-15	R 4.0.1	August 2010	Update Release
16th Edition	P01-753-16	R 4.1	December 2010	Update Release

INSBRIDGE FRAMEWORK ADMINISTRATOR

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

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

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

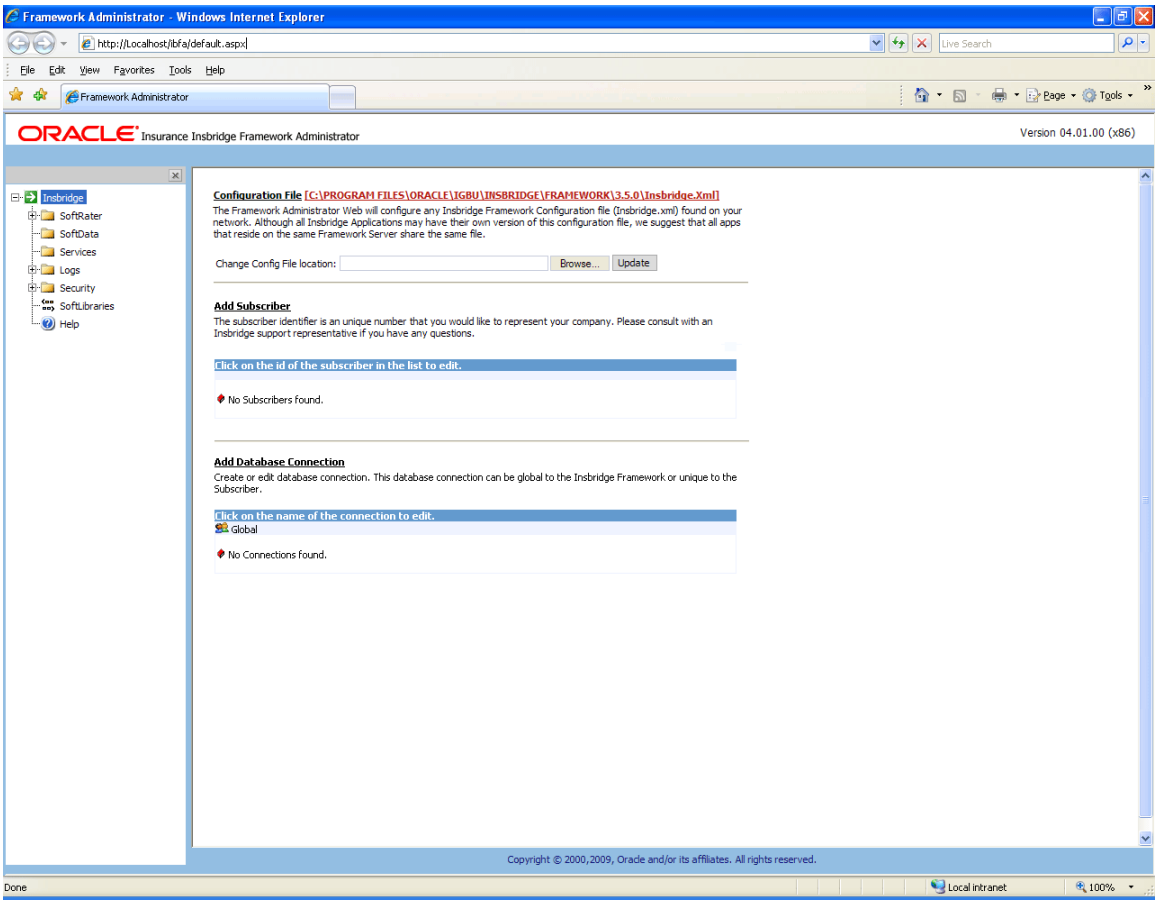


Figure 1 Insbridge Framework Administrator Main Screen

INTRODUCTION TO THE INSBRIDGE PAGE

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

- Set up subscribers
- Set up database connections
- View the configuration file

Navigating to the Insbridge Page

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

2. This will open the Insbridge page.

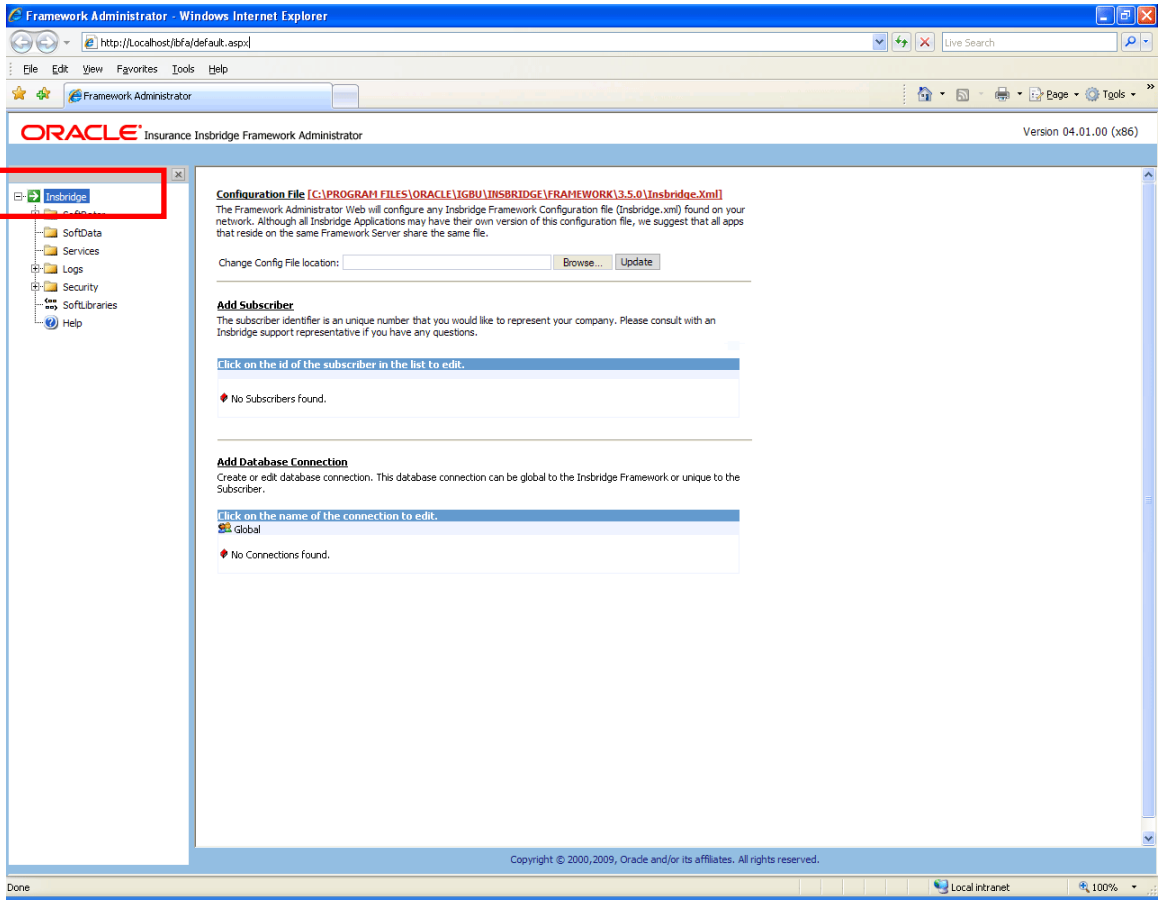


Figure 2 Insbridge Page

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

SUBSCRIBERS

A *subscriber* is a group or collective of users and environments under a single identity. This identity is used to manage and configure the group's activities and databases. A subscriber may be a single company, a group within a company, or a single person. You can create as many subscribers as you need at any time.

ADDING A SUBSCRIBER

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

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

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

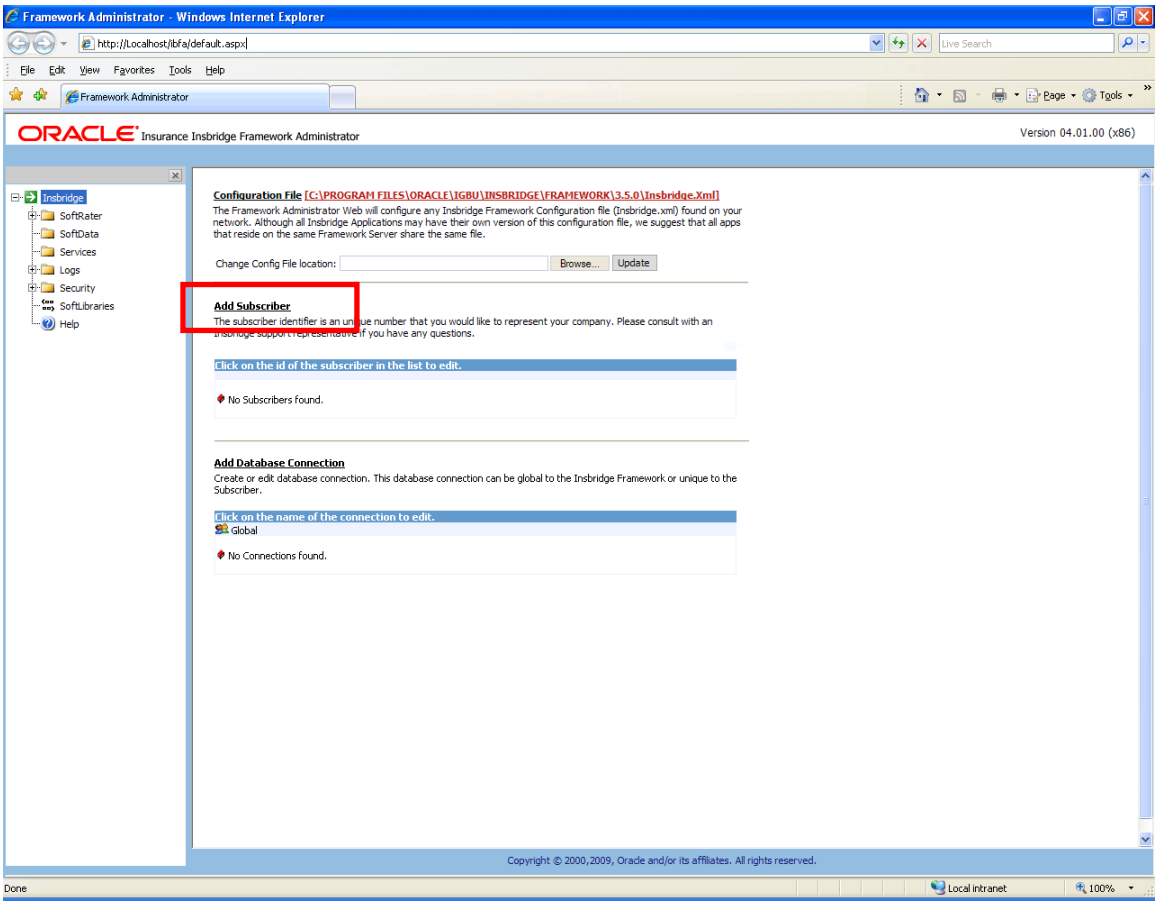


Figure 3 Adding Subscriber Links

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

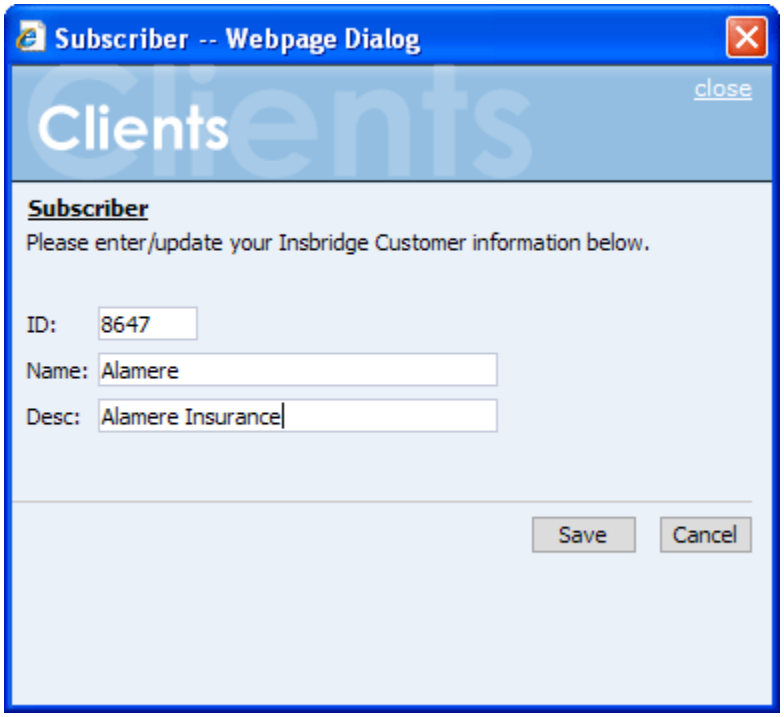


Figure 4 Adding a New Subscriber

3. Enter the **ID, Name** and **Description** for the new subscriber. When you finish entering the information, click **Save**.

4. The new subscriber will now show in the list of subscribers.

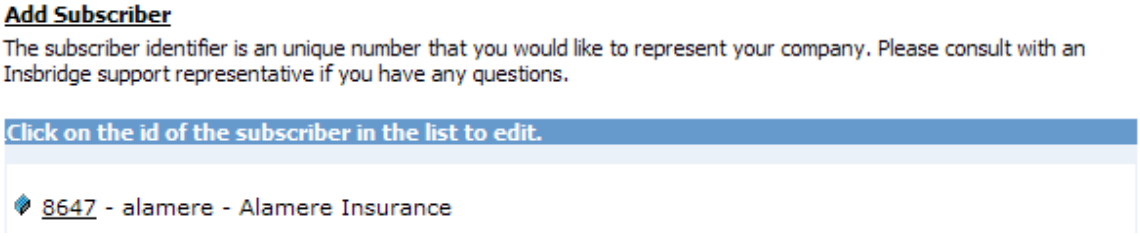


Figure 5 Subscriber List

5. To configure environments, LOB's and virtual servers for a new subscriber, see the SoftRater Configuration Page.

6. You can edit a subscriber's description by clicking their ID in the subscriber listing. The ID and name of a subscriber cannot be edited.

Additional Subscribers

Additional subscribers can be added at any time. If you plan on having multiple environments, you will need to create the same subscriber in each instance.

Subscribers and Libraries

Creating multiple subscribers allows for different groups within the company to have their own subscriber IDs. Subscriber designation determines what templates can be applied in RateManager. If everyone is under the same subscriber, users will not be able to use the Library to share templates within the company. Users will still be able to apply templates from others outside the company.

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

Editing a Subscriber

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

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

Deleting a Subscriber

If a subscriber is no longer needed, they can be deleted. Make certain a subscriber is not needed before deleting them, as this action cannot be undone. When a subscriber is deleted, all associated database connections and environment settings are also deleted.

1. From the Insbridge page, click the hyperlinked Subscriber ID number (in Figure 6, you would click 9621).

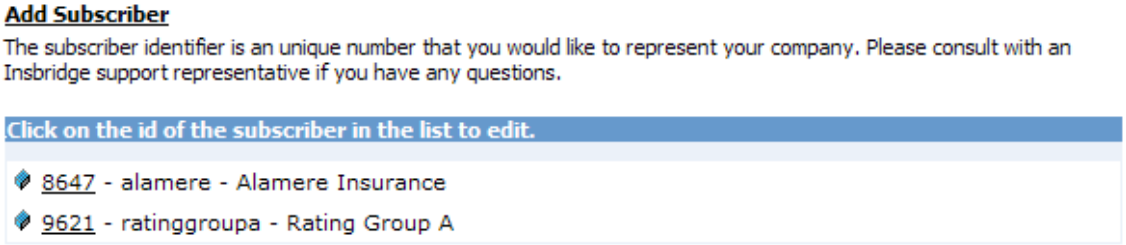


Figure 6 Subscriber List

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

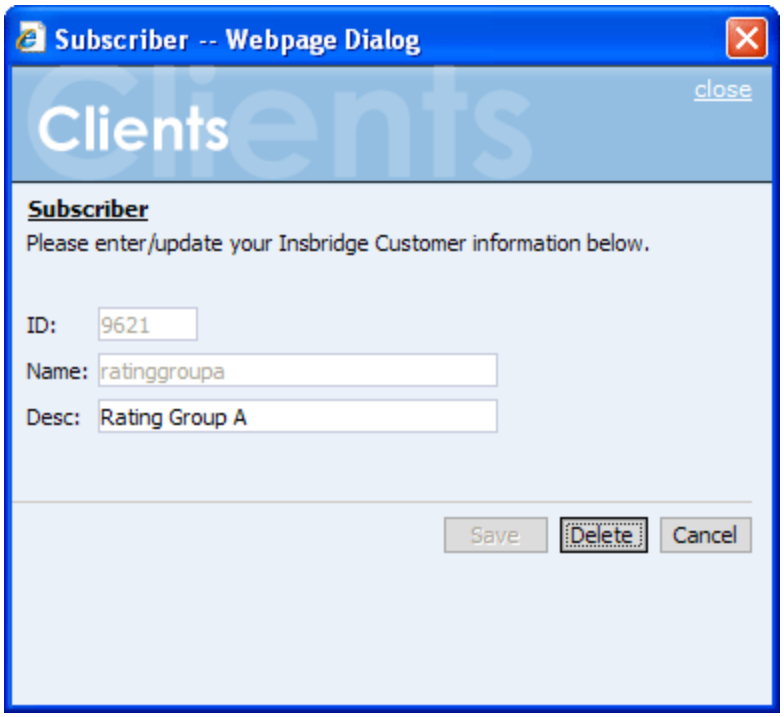


Figure 7 Deleting a Subscriber

3. Click the **Delete** button. A warning message will be displayed.

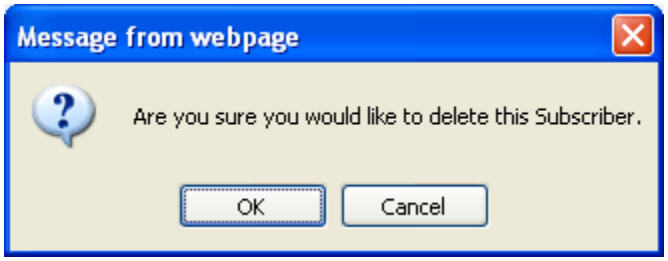


Figure 8 Confirm Deleted Subscriber

4. Click **OK** to remove the Subscriber or **Cancel** to return to the previous screen.

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

DATABASE CONNECTION

Database connection information must be added before configuring the environments. Information entered here will define subscriber and security databases and the RateManager database. This is usually done at installation but database connections can be added at any time.

The three databases that must be added are:

- **Controller** – This is a global database and is required for logging in to the IBRU system. This is not unique to the subscriber.
- **Security** – This is a subscriber specific database and is required for subscriber security information.
- **RM** – This is a subscriber specific database and is required for RateManager. This information will also be used when creating the RateManager environment.

The setups are similar for all three databases.

Adding a Database Connection

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

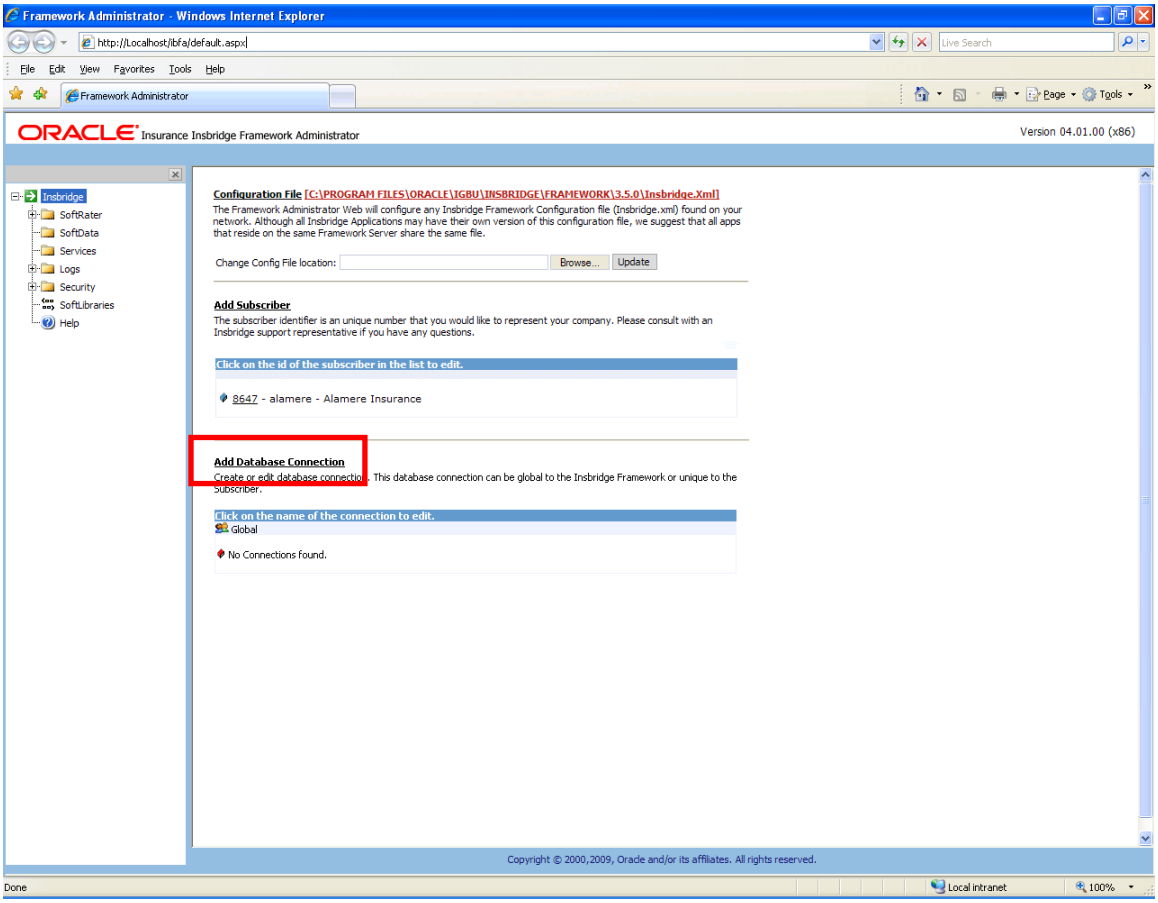


Figure 9 Adding Database Link

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

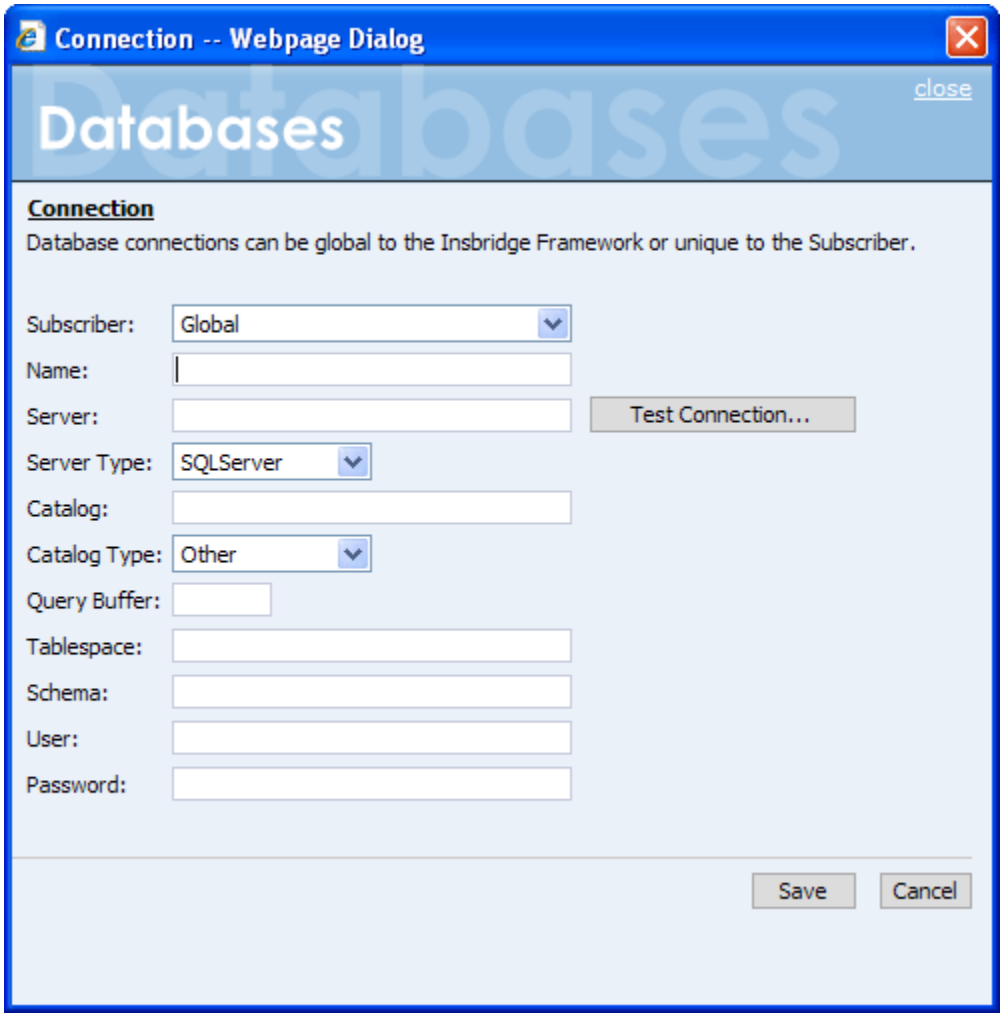


Figure 10 Adding a New Database

NOTE: *You will need to have ready the database server name or IP address, the name of the catalog in the database, login and password.*

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

   For the three databases that must be added to IBFA:

   - Select Subscriber: **Global** with Name: **controller**
   - Select Subscriber: (**Your Subscriber Name**) with Name: **security**
   - Select Subscriber: (**Your Subscriber Name**) with Name: **RM**

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

5. Enter in the **Server** name. This is the server name or IP address, which ever is resolvable by the IBRU web server. You also can test the connection and make sure it is valid at the time of entry.

6. Select the **DB Server Type**. This is the type of server that houses the database. The controller, security and rm databases will all be SQL Server.
7. Enter in the name of the **Catalog** in the database.
8. Select the **Catalog Type**. The types available are: RateManager, SoftRater and Other. The controller and security databases will both be type OTHER. The rm database will be type RateManager.
9. **Query Buffer**, **Tablespace** and **Schema** not required for the controller, security and rm databases.
10. Enter in the **Username** to access the database.
11. Enter in the **Password** to access the database.
12. Click **Save** to save your work.

When you go to save, if a field is required and you have not entered any information, you will have to correct the error before the database can be saved.

Editing a Database

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

Please contact Insbridge Support for any other changes.

Deleting a Database

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

1. From the Insbridge page, scroll down to the subscriber you need. Click the underlined database you want to delete (in Figure 11, you would click rm).

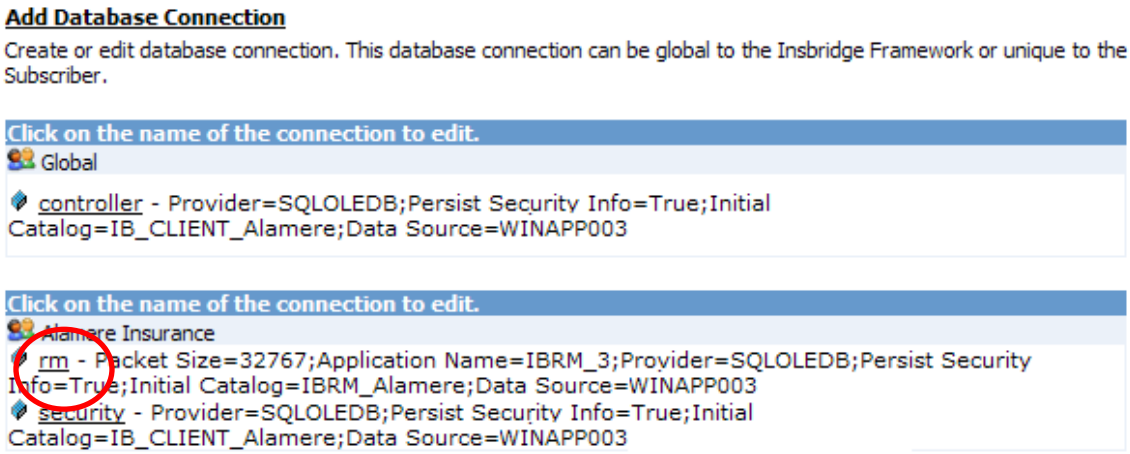


Figure 11 Database List

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

Figure 12 Edit Database Window

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

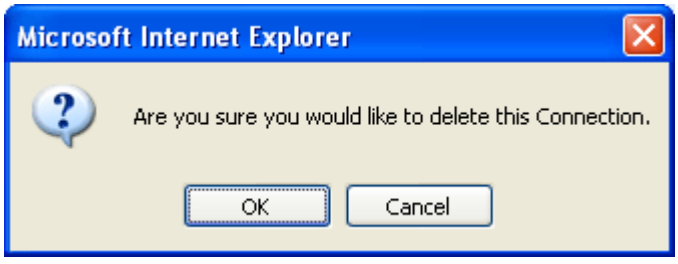


Figure 13 Confirm Deleting Database

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

WARNING: This action cannot be undone.

CONFIGURATION FILE

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

- Subscribers
- Environments
- Database Connections
- Security
- Virtual File Servers
- Internet Proxy

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

Viewing the Configuration File

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

1. On the Insbridge page, click the underlined configuration file path at the top of the screen, **C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\FRAMEWORK\3.5.0|Insbridge.Xml.**

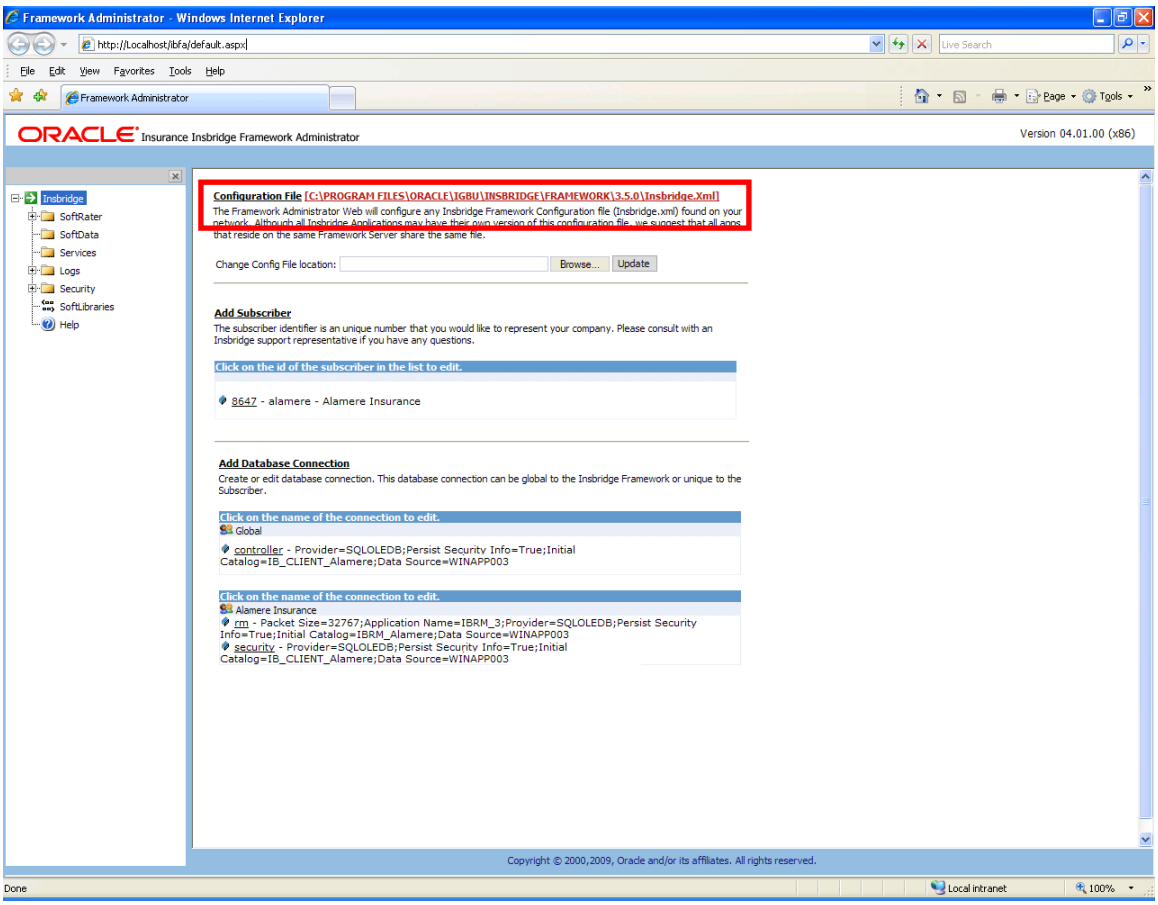


Figure 14 Insbridge Page Configuration File Path

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

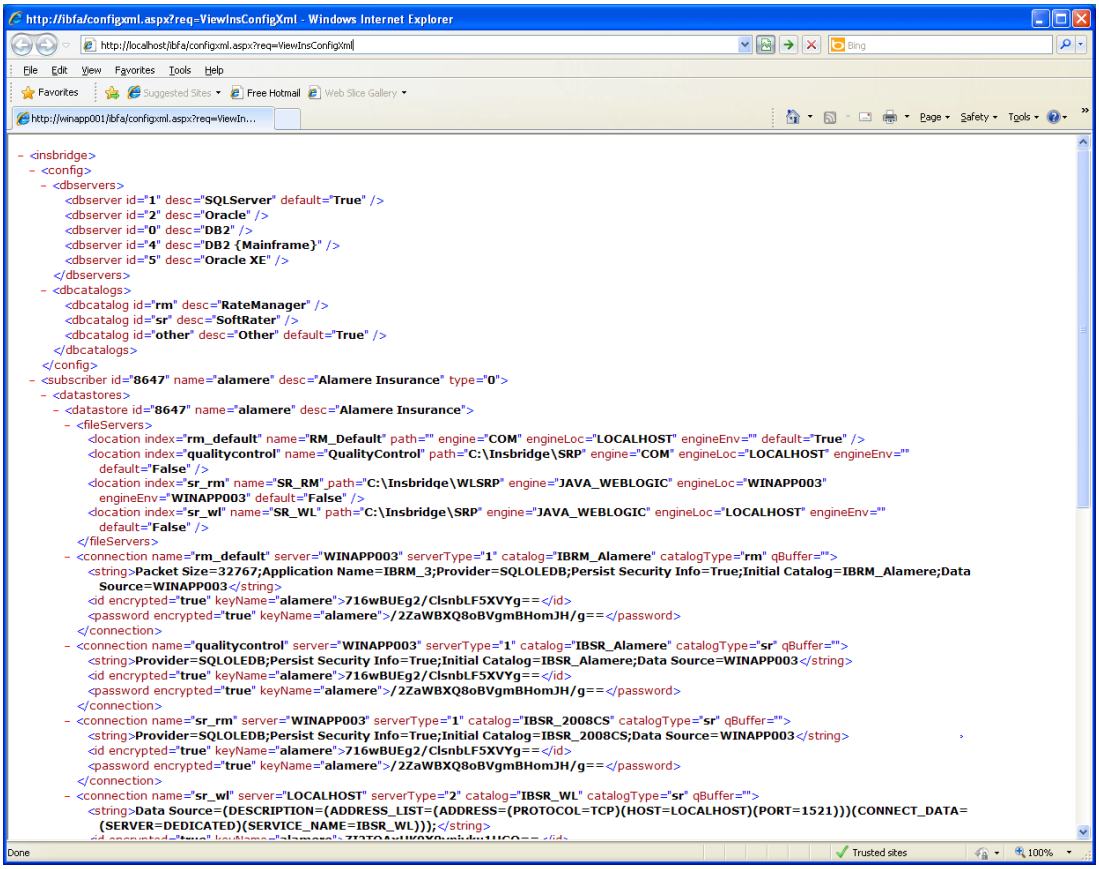


Figure 15 Configuration File New Window

NOTE: If you have an older version of IBFA, you may have a different configuration path:

D:\ProgramFiles\InsBridge\Framework\2.0.2\InsBridge.Xml.

OR **C:\PROGRAM FILES\ORACLE\INSBRIDGE\FRAMEWORK\2.0.0|Insbridge.Xml**

Choosing a Different Configuration File

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

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

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

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

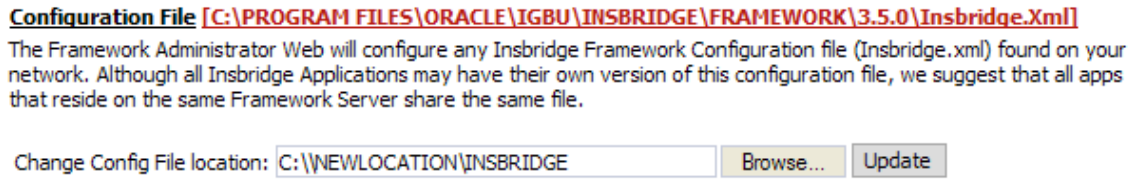


Figure 16 Changing Location of Configuration File

3. When you are finished, click **Update**.

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

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

Chapter 3

INTRODUCTION TO THE SOFTRATER PAGE

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

The SoftRater page has four areas:

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

Navigating to the SoftRater Page

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

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

SOFTRATER TEST INTERFACE

Use the SoftRater Test Interface when you want to:

- Compare rates from different servers
- Verify a package is loaded
- Verify SoftRater is using the correct version of a program
- See how long SoftRater is taking to rate a program

Rating a File Using the SoftRater Test Interface

When rating a file through the SoftRater Test Interface, you have the ability to instruct SoftRater on how to rate the file and how to return the results. These options are divided into two categories:

- Rate Operators
- Map Request Operators

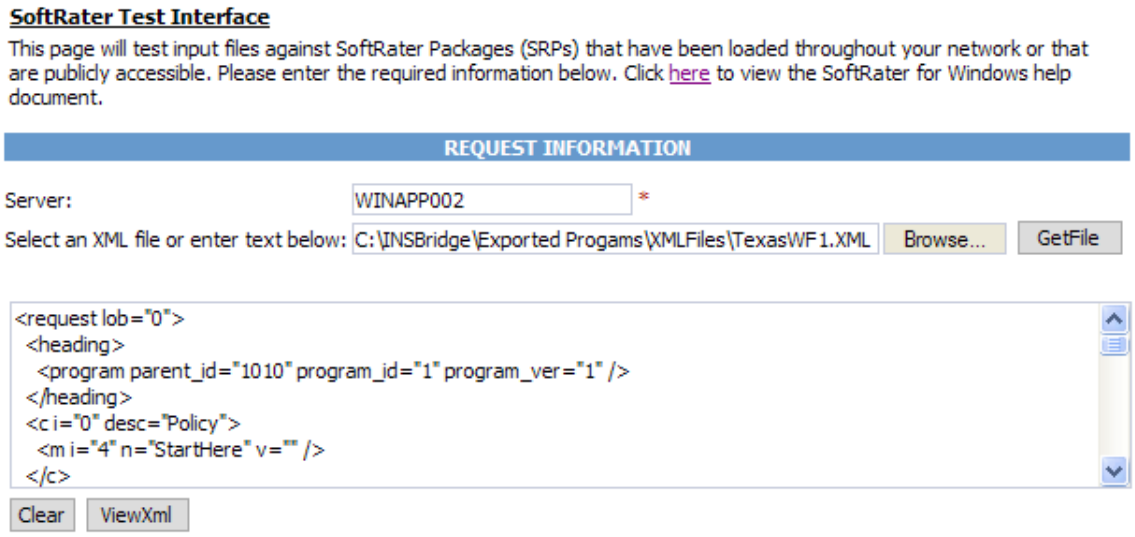


Figure 17 SoftRater Test Interface

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

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

3. Scroll down the page and choose any optional operators SoftRater should use when rating the file.

4. When you are ready to rate the file, scroll to the bottom of the page and click **Execute**.

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

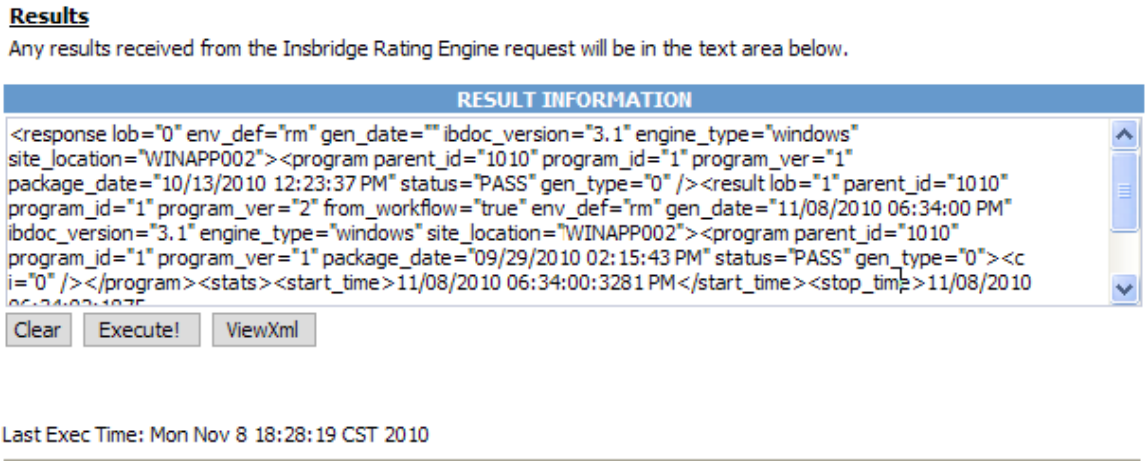


Figure 18 Test Results

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

Optional Rate Operators

Rate operators add or remove information from the result XML. They also enable you to override the default result and environment definitions. To view or edit optional rate operators, click the expand icon on the far right hand side of the RATE OPERATORS header.

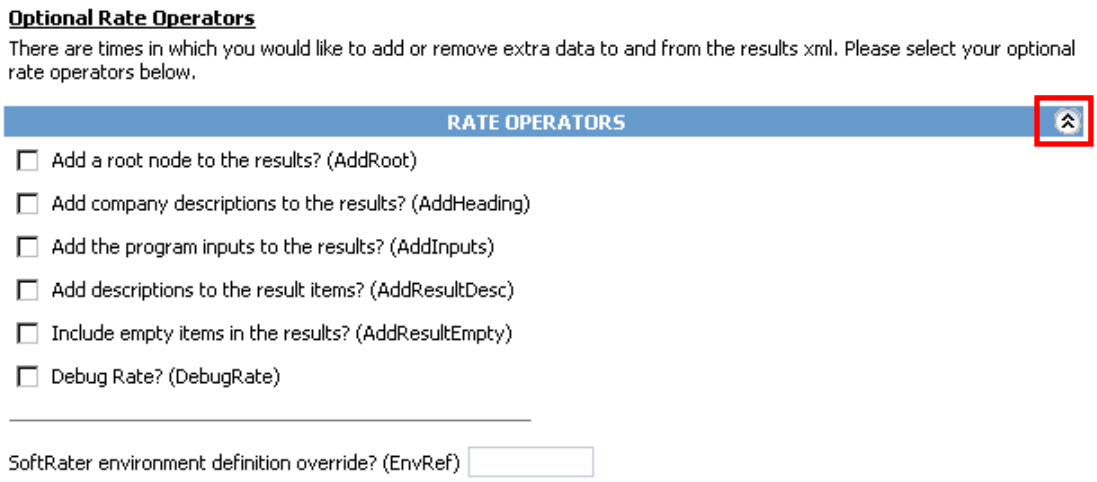


Figure 19 Optional Rate Operators

NOTE: *You can use any combination of rate operators.*

The following options require you to check a box to enable the item:

Add a root node to the results? (AddRoot): Add the root node when you want to determine how long SoftRater is taking to rate a policy. The root node contains the time rating started and the time rating stopped. It also shows you the number of input files and

the number of output files. The root node is always the first line in the results and begins with `<ibdoc>.`

Add company descriptions to the results? (AddHeading): Add the folder pathway when you want to see the name of the path of the folder, program and program version.

Add the program inputs to the results? (AddInputs): Add the program inputs when you want to verify that SoftRater is using the correct input values.

Add descriptions to the result items? (AddResultDesc): Add descriptions to the results when you want to see the name of the variable or input along with the result ID. The variable or input name will be shown after the `d`, while the result ID is shown after the `i.` In the following example output, `VehPrincipallyDriven` is the input name, and `Primary Vehicle` is the result ID:

```
<m i="Primary Vehicle" d="VehPrincipallyDriven" v="1" />
```

Include empty items in the results? (AddResultEmpty): By default, SoftRater does not output results that do not have a value. If you would like to see all results, check this box.

Debug Rate? (DebugRate): Check this box if you would like to see the debugged XML along with the results.

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

SoftRater environment definition override? (EnvRef): If you do not want to rate against the default SoftRater environment, enter the environment that should be rated against in this box.

Optional Map Request Operators

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

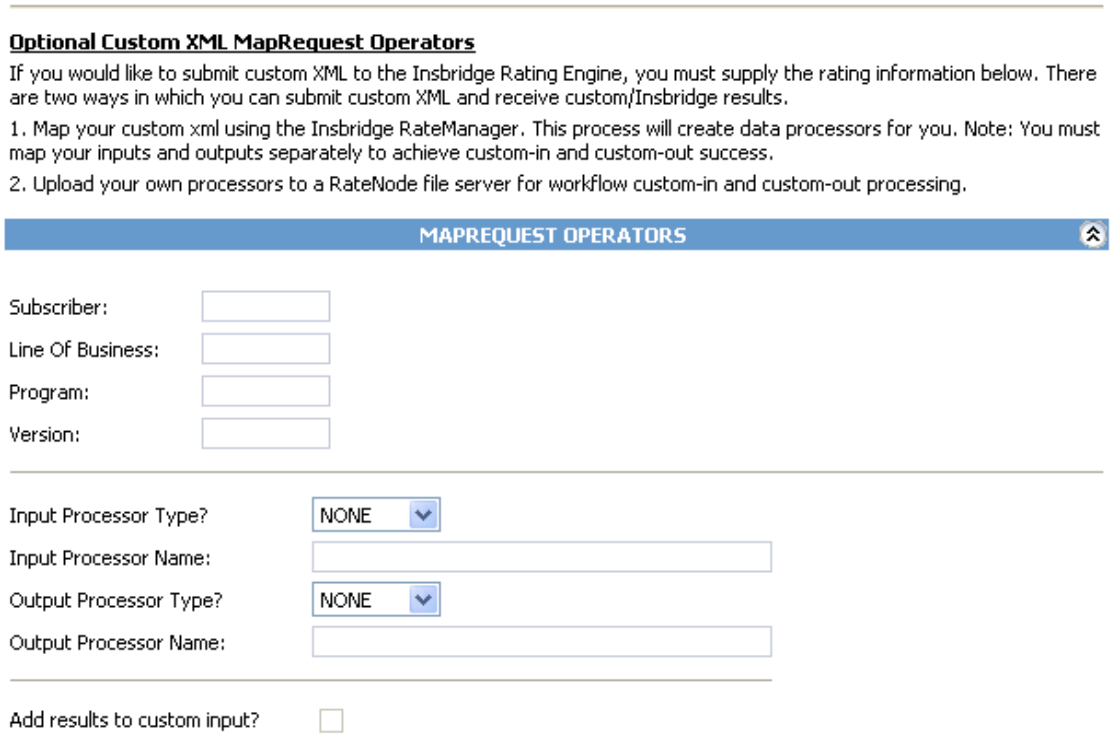


Figure 20 Custom XML Map Request Operators

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

Subscriber: Your subscriber ID.

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

Program: The program ID you are rating.

Version: The program version you are rating.

The following information is required only if using custom input XML:

Input Processor Type: The type of input mapping to use.

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

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

CUSTOM: A mapping that was created outside of RateManager and then imported.

Input Processor Name: The unique identifier that was entered for the mapping.

The following information is required only if you want to receive custom output XML:

Output Processor Type: The type of output mapping to use.

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

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

CUSTOM: A mapping that was created outside of RateManager and then imported.

Output Processor Name: The unique identifier that was entered for the mapping.

You can optionally check the following:

Add results to custom input: If you want the original input file to be appended at the beginning of the result file, select this box.

Chapter 4

SOFTRATER ENGINE

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

To Navigate to the SoftRater Engine

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

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

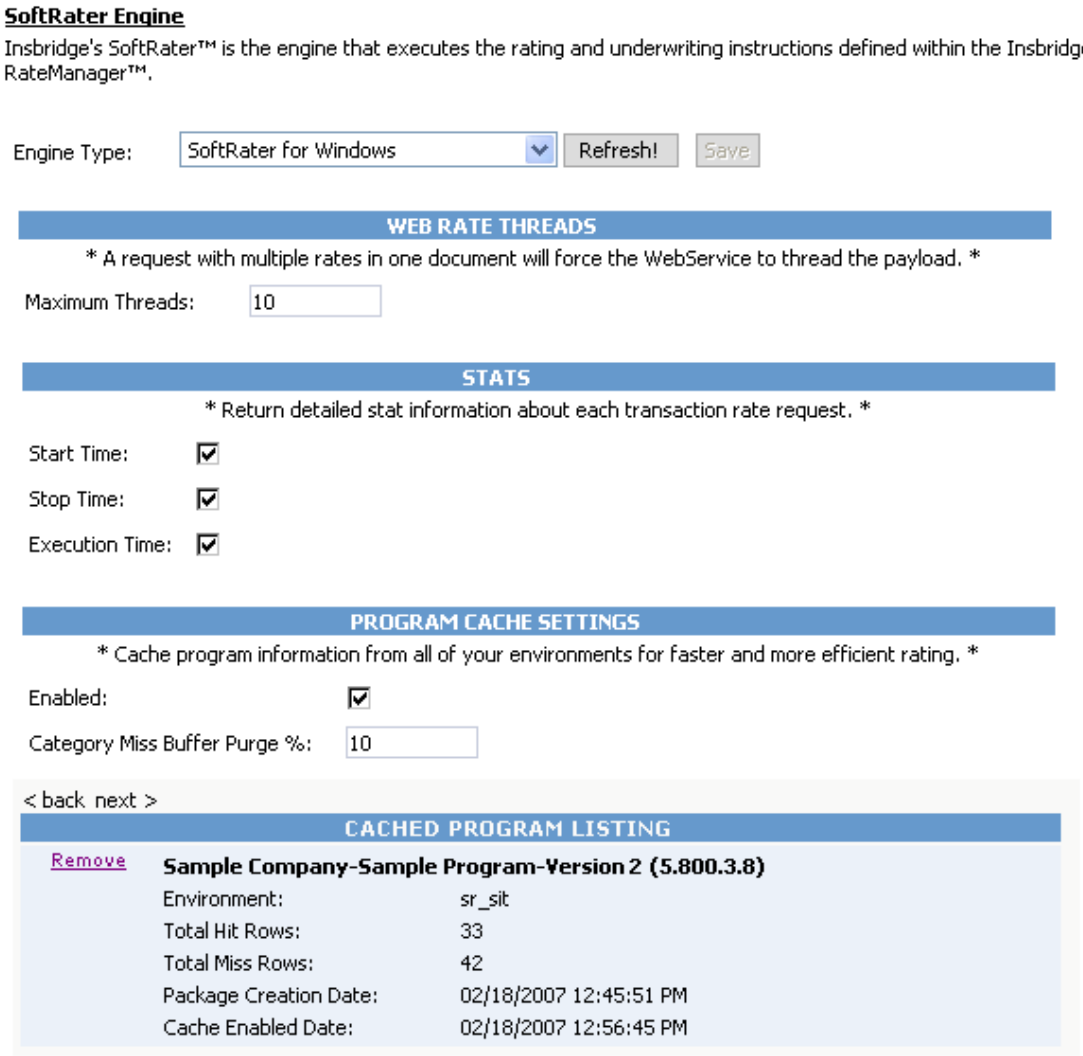


Figure 21 SoftRater Engine Configuration Page

Engine Type

Select the engine type where you want to view configuration information.

SoftRater for Windows: Shows configuration information for the SoftRater for Windows engine (IBFA).

Custom: IBFA has the ability to route rate requests to custom created engines.

Custom engine types require Professional Services. For more on custom engine types, please see Custom Engine Types.

Web Rate Threads

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

Stats

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

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

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

Execution Time: The **Start Time** minus the **Stop Time.** The result is the length of time rating took, in milliseconds (1000 milliseconds = 1 second). Returned in the <running_time> node.

NOTE: ***Start Time*** *and* ***Stop Time*** *are shown in microseconds (10^{-3} seconds), while the execution time is shown in milliseconds (10^{-2} seconds).*

Program Cache Settings

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

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

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

Cached Program Listing

The Cached Program Listing will be displayed only when program cache settings are enabled. Cached program listing shows programs that have information stored in the cache. If more than five programs have information stored in the cache, use the < back and next > hyperlinks to navigate between the pages.

Remove: Removes the corresponding program's data (hits and misses) from the cache.

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

Total Hit Rows: Total number of hits stored for the corresponding program.

Total Miss Rows: Total number of misses stored for the corresponding program.

Package Creation Date: Time stamp of when the package was created for the corresponding program.

Cache Enabled Date: Time stamp of when information was first stored in the cache for the corresponding program.

For additional information on caching, see the SoftRater topic Introduction to SoftRater Caching in the SoftRater User Guide.

CUSTOM ENGINE TYPES

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

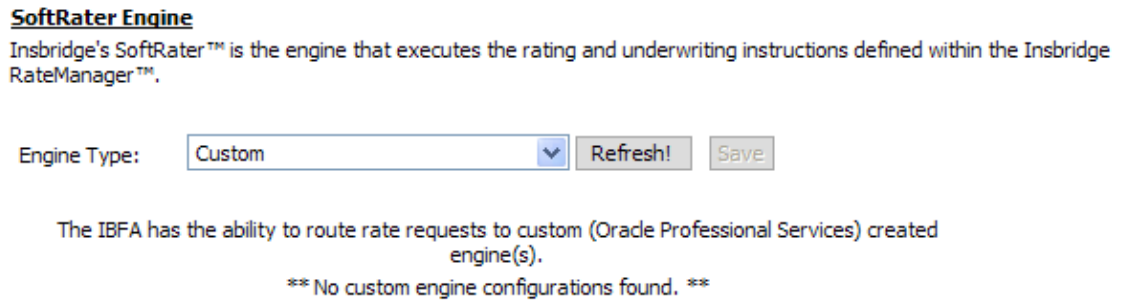


Figure 22 Custom Engine Types

Editing a Custom Engine Type

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

Custom engine type information must have at least a URL. If other information such as a user name and password is required, it may be listed. URLs, user names and passwords, or other information can be edited here. Type in any changes in the text box and click **Save**. Any edits here will be saved to the connectors.config file.

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

Adding a Custom Engine Type

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

Customization may be required for the custom engine type. Please contact Oracle Insurance Support representative for more information.

Chapter 5

SOFTRATER EXPLORER

SoftRater Explorer is where you can enter administrator email addresses, set setup and configure environments, manage packages, and perform backups. SoftRater Explorer has two pages:

- **Explorer Configuration Page:** This page contains universal settings that apply to all subscribers.
- **Subscriber Page:** Each individual subscriber will have a SoftRater Explorer page that has two tabs.

  Settings: This is where you setup and configure environments, LOB's, and virtual file servers. You must complete this information prior to working on the Content tab.

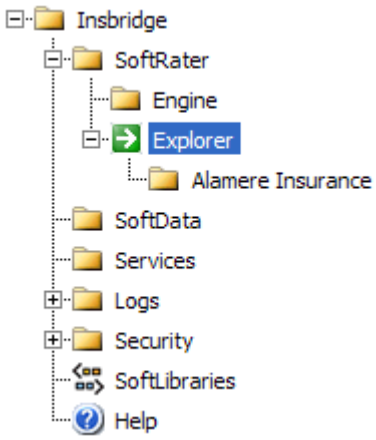
  Content: Once configured, SoftRater Explorer is where you will download, load, unload, move and delete packages to/from your SoftRater environments. This tab also is where you create backups for remote SoftRater environments.

Explorer Configuration Page

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

Navigating to the Explorer Configuration Page

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



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

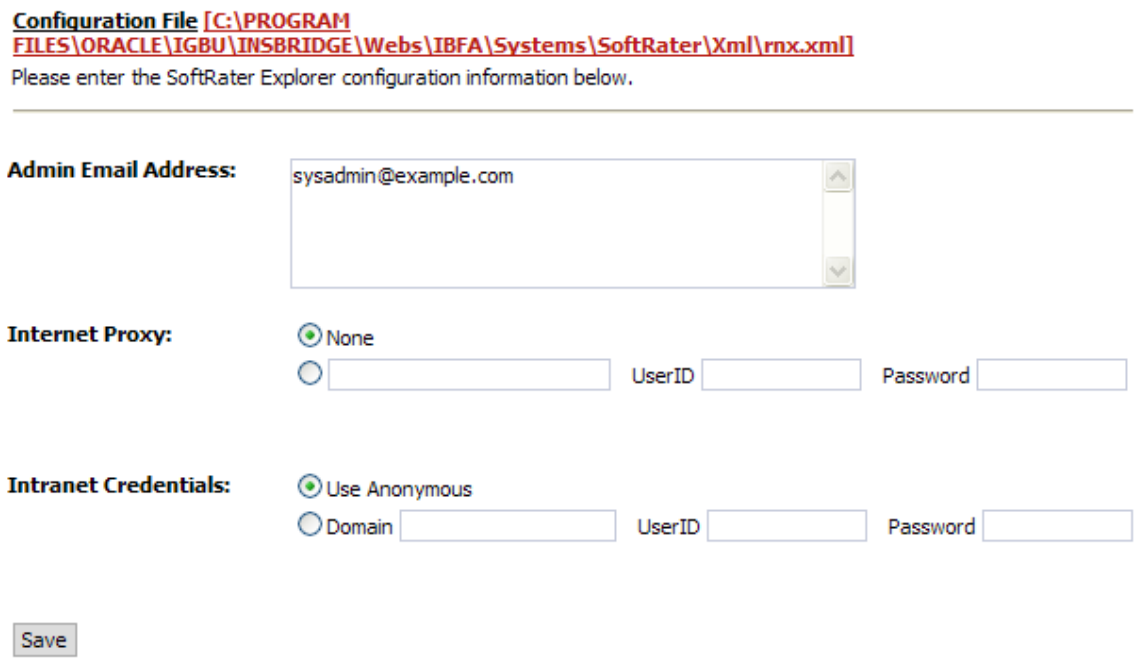


Figure 23 Explorer Configuration Page

Configuration File: This configuration file (rnx.xml) contains the information entered on the current page **(Explorer Configuration Page)**. This file will not be created until you have saved an entry. If you click on the link without saving an entry, you will receive an error message. After you have saved an entry, you can view the file by clicking the underlined path to the file. You also can edit the rmx.xml file directly on the machine where the IBRU system was installed.

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

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

Internet Proxy: If you use an internet proxy, you will need to set up this information in order for packaging operations to succeed. The first text box is for the name of the proxy and the last two are for you to enter a user ID and password. No proxy is the default.

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

NOTE: *Any passwords entered in the rmx.xml file are encrypted.*

To Create or Edit the rmx.xml File

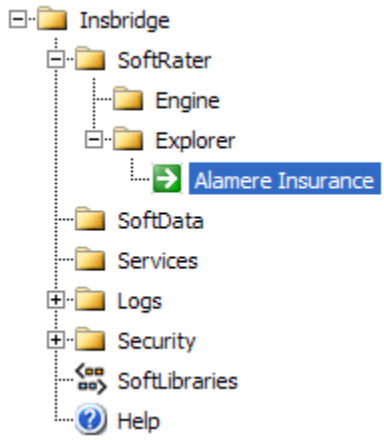
1. Make an entry to the email addresses, proxy settings or intranet credentials.
2. Click **Save** to update the configuration file.

SETTINGS TAB

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

Navigating to the Setting Tab

1. Using the menu tree, click the expand icon (⊞) next to **SoftRater** to expand it and then again next to **Explorer**. Then click the name of the subscriber.



2. First time users will land on **Settings Tab**.

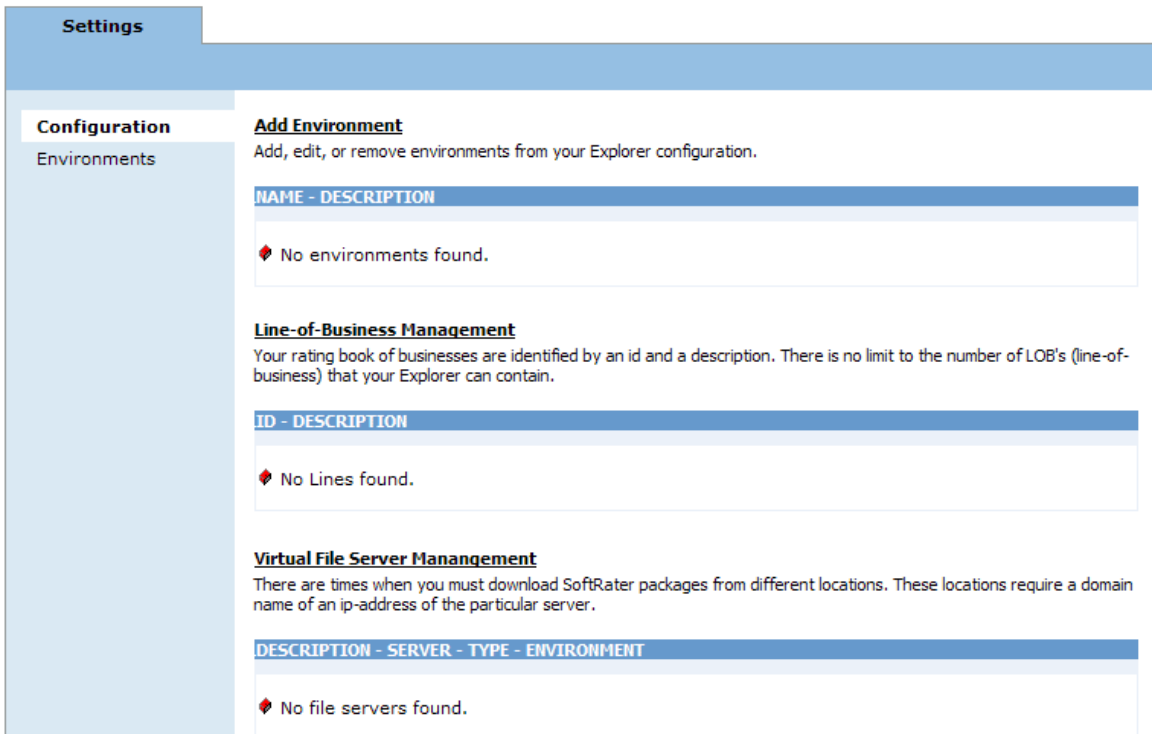


Figure 24 Subscriber Settings Tab

The Settings tab will have two subtabs:

- **Configuration** – This subtab is where you can add or delete the IBRU environments you want to use. All environments where packages will be placed or accessed needs to be created on the Configuration subtab first. Any environment that this machine communicates with should be added here as well.

- **Environments** – This subtab is where environments are configured. Any environments that you create on the Configuration subtab can be configured on the Environments subtab.

CONFIGURATION SUBTAB

The Configuration subtab should be completed at installation however additions, deletions and changes can be done at any time.

There are three areas that can be setup on the Configuration subtab:

- **Environments**
- **Lines of Business**
- **Virtual Servers**

Environments

An *environment* is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. Environments are local to the subscriber they are created under. There is no limit to the number of environments you may have. You must have at least one environment created in order to load packages to SoftRater. If you are creating a SoftRater Native environment, you can select any environment type. Environments on the Configuration subtab have the following options:

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

Adding an Environment

1. To add an Environment, click the **Add Environment** link on the Configuration subtab.

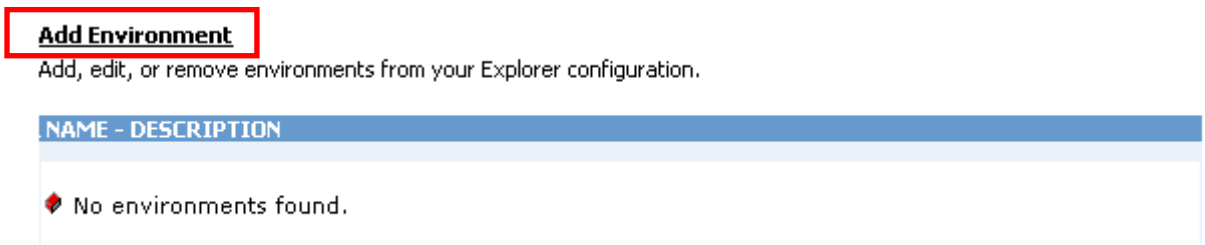


Figure 25 Environment Listing Subtab

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

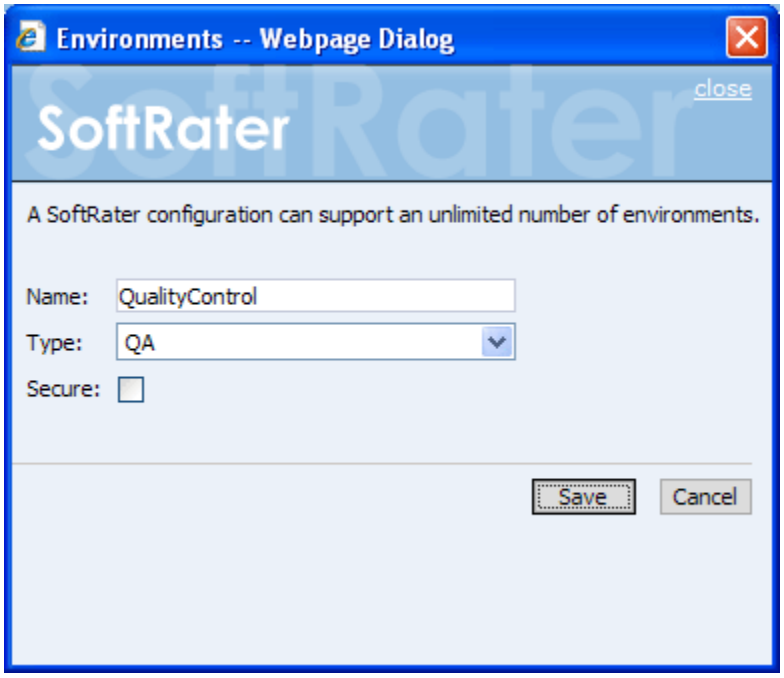


Figure 26 Adding an Environment

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

   - Development
   - Quality Assurance
   - Production

4. If you want to make the new environment secure, check the box next to **Secure**. A secure environment will be available to users who are logged into the Framework Administrator only.

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

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

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

Editing an Environment

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

NOTE: *Changes are not effective in a JBoss environment until the JBoss service has been stopped and started.*

Deleting an Environment

Any environment can be deleted at any time. Deleting an environment does not delete any packages stored in that environment. It only removes the reference to the location of the packages from IBFA.

1. To delete an environment, click the environment's name in the environment listing.

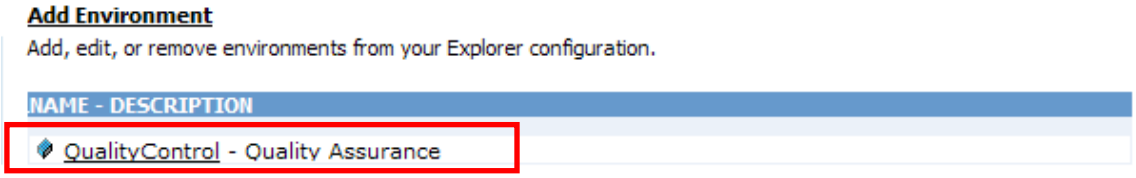


Figure 27 Environment List

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

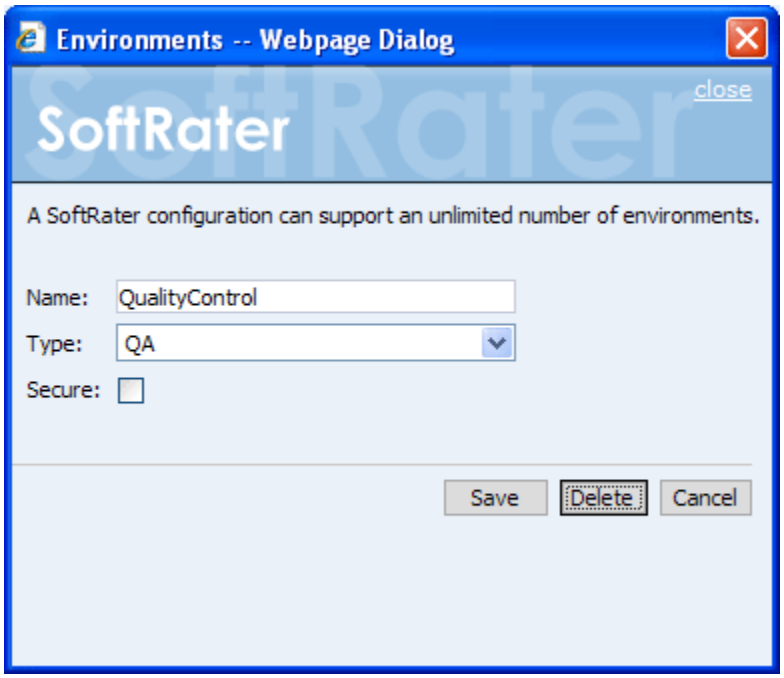


Figure 28 Edit Environment

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

Figure 29 Confirm Delete of Environment

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

Line of Business Management

Adding or deleting a line of business from the Framework Administrator does not add or remove that line of business from RateManager. Setting lines of business in IBFA is a way for you to filter the results shown on the **Packages** subtab.

Adding a Line of Business

1. From the Configuration subtab, click the **Line-of-Business Management** link.

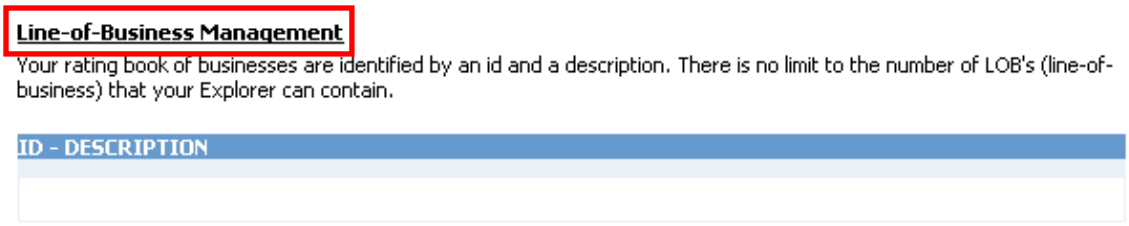


Figure 30 Line of Business Management

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

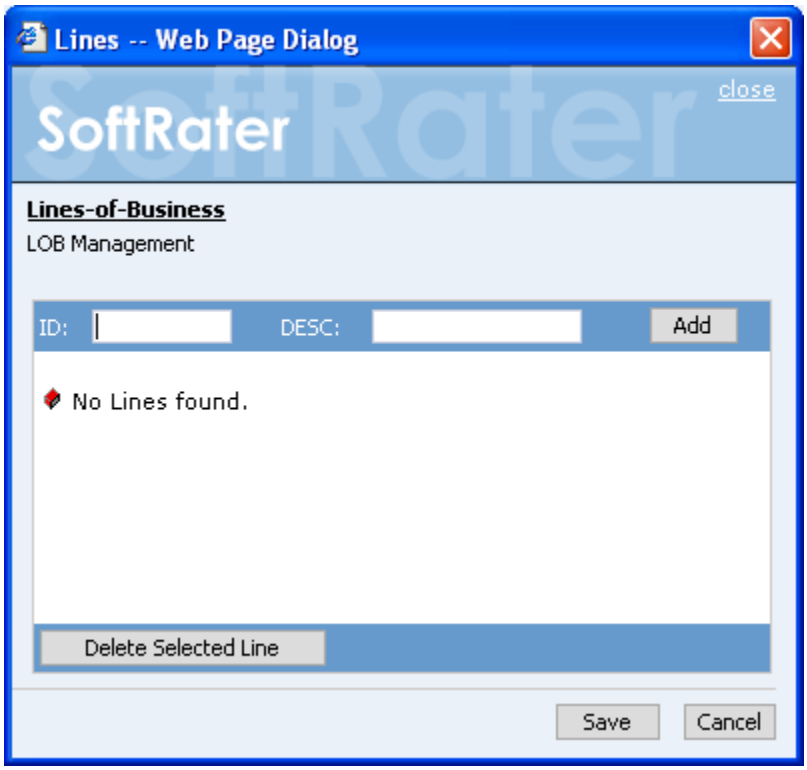


Figure 31 Adding a Line of Business

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

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

5. Click **Add**.

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

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

Editing a Line of Business

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

Deleting a Line of Business

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

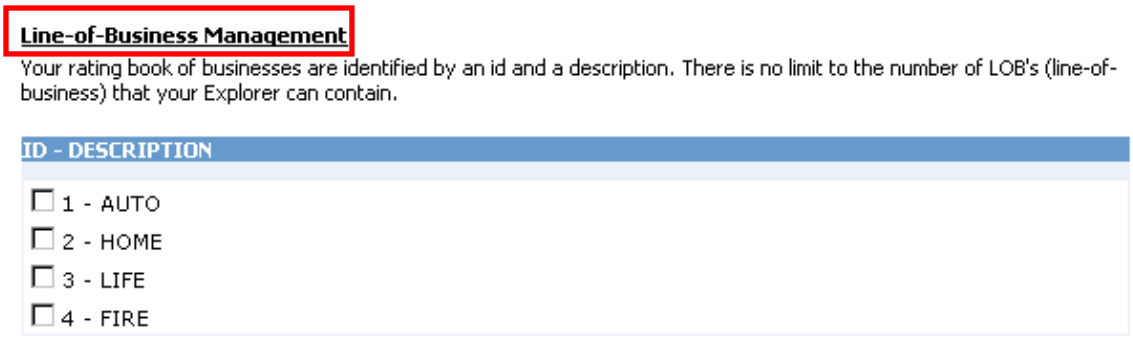


Figure 32 Line of Business Management Screen

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

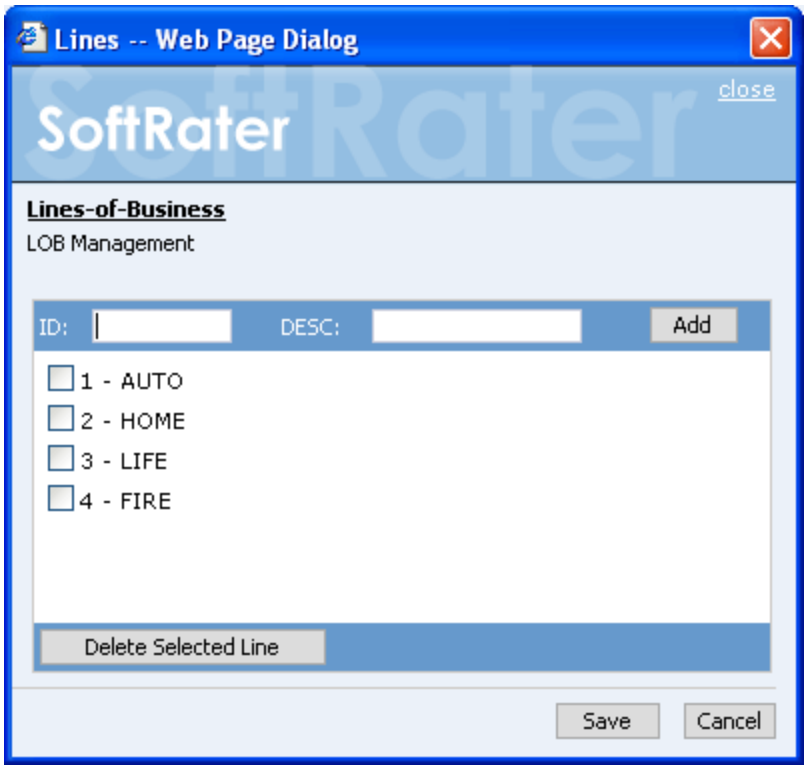


Figure 33 Selecting a Line of Business to Delete

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

Virtual File Server Management

A Virtual File Server is used to pull SRPs from an IBFA environment that is separate from this one. Only the IBFA that is pulling in the SRPs will need to have the Virtual File Server created. The IBFA where you are pulling SRPs from does not need a Virtual File Server.

Virtual File Servers are for Windows environments only. You will not need to set one up for a Java environment. Virtual file servers can be created or deleted at any time.

Adding a New Virtual File Server

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

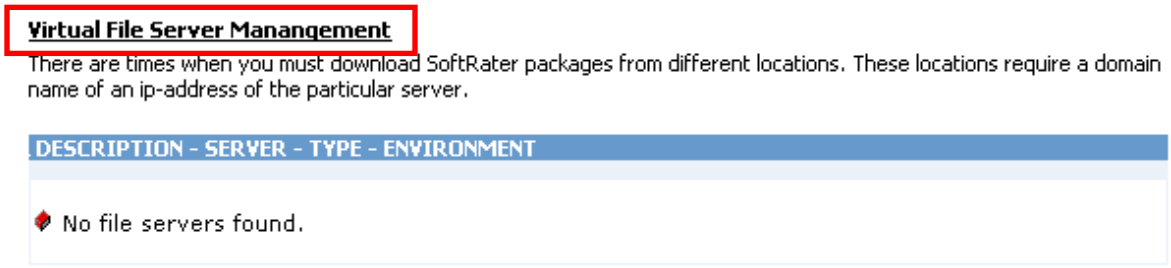


Figure 34 Virtual File Server Management Screen

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

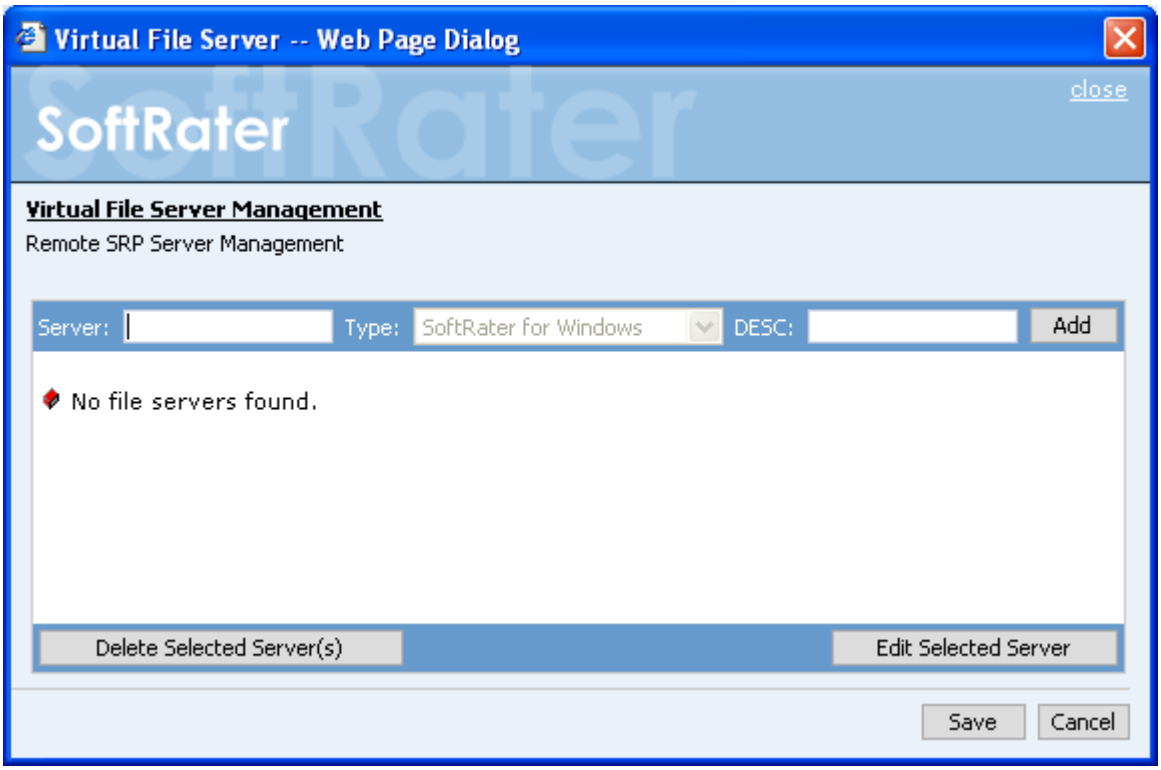


Figure 35 Virtual File Server Management Window

3. Enter the **Name of the Server** and a **Description**. You can use either the IP address or

the server name.

NOTE: *Take care when entering the server name. This field cannot be edited. If you make a mistake, you must delete and re-enter.*

4. Click **Add** to add the server to the list. Enter in as many servers as you need.
5. When you are finished, click **Save** to save your work and return to the previous screen.

Editing a Virtual File Server

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

1. On the Configuration subtab, click the **Name** of the **Virtual File Server** you want to edit.

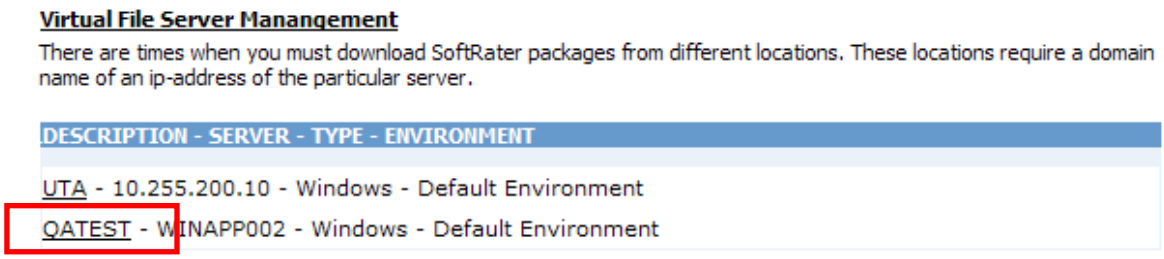


Figure 36 Virtual File Server Management

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

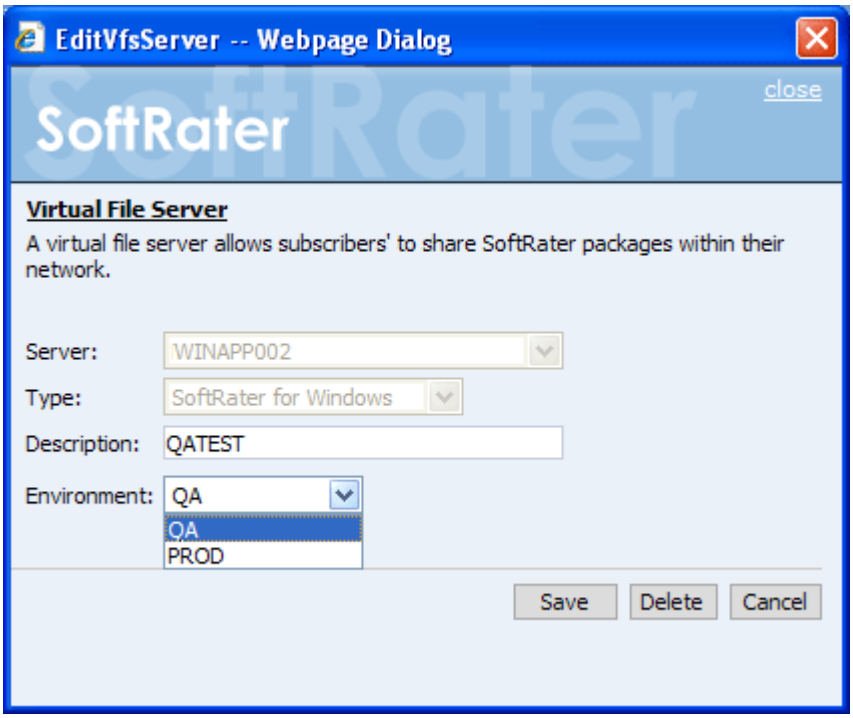


Figure 37 Editing Virtual File Server Management

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

3. Make your edits to the **Description** field.

4. If multiple environments have been set up, the options will be listed in the environment listing. If no other environments can be found, this option will be grayed out. Select the environment you want.

5. Click **Save** to save your work and return to the Configuration subtab.

Deleting a Virtual File Server

A Virtual File Server can be deleted at any time from the Configuration subtab.

1. Click the **Name** of the **Virtual File Server** you want to delete.

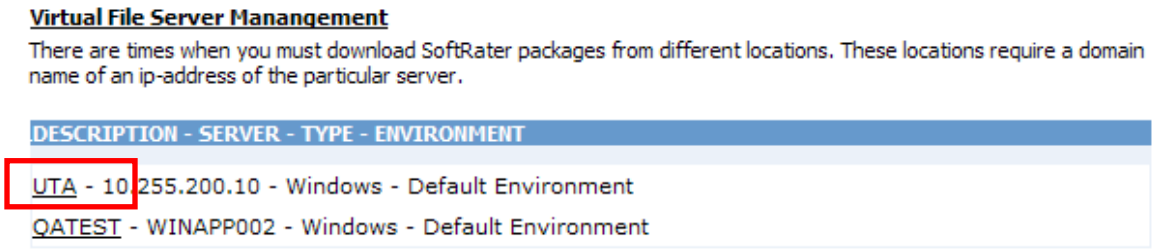


Figure 38 Virtual File Server Management Screen

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

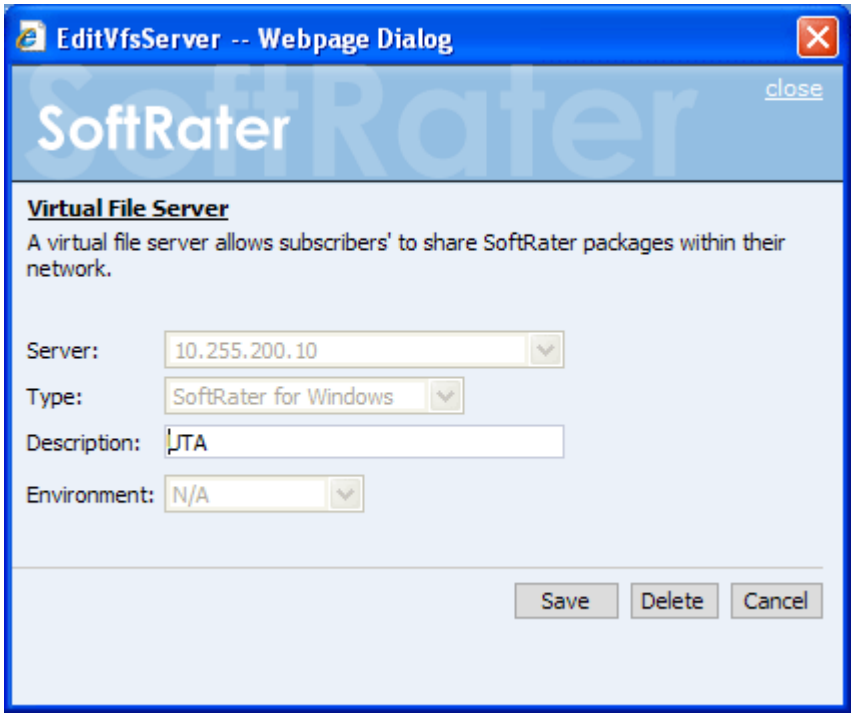


Figure 39 Deleting Virtual Server on Popup

3. Click **Delete**.

4. You will be asked to confirm deleting the server.

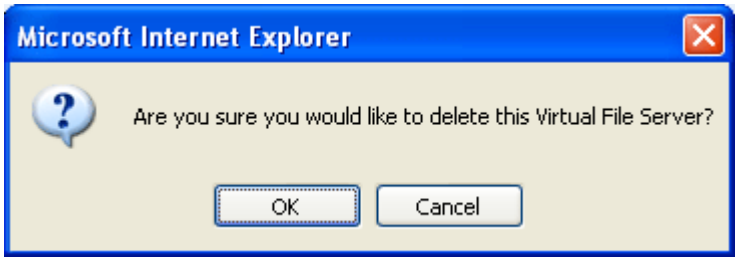


Figure 40 Confirming Deleting of a Virtual File Server Management

5. Click **OK** to delete the selected servers.

6. The configuration subtab will refresh and the deleted server will no longer be displayed.

Editing and Deleting from the Virtual File Server Management Screen

You can edit and delete from the Virtual File Server Management screen as well. Use this method when you want to edit or delete a server with an obvious error, for example a typo in the server name. This method will not try to discover the environment. No warning message will be displayed

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

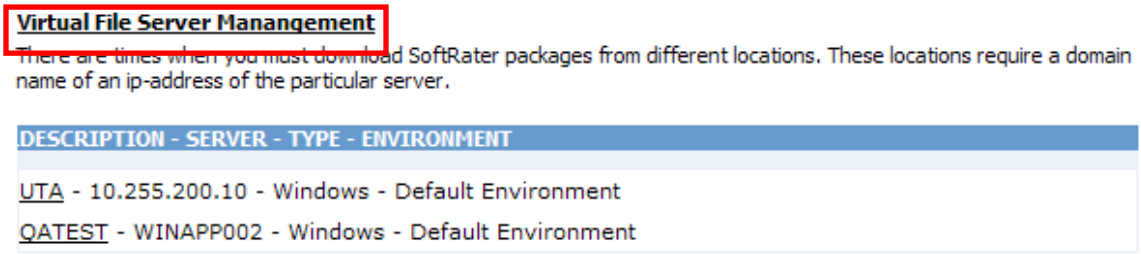


Figure 41 Virtual File Server Management

The Virtual File Server Management screen will be displayed.

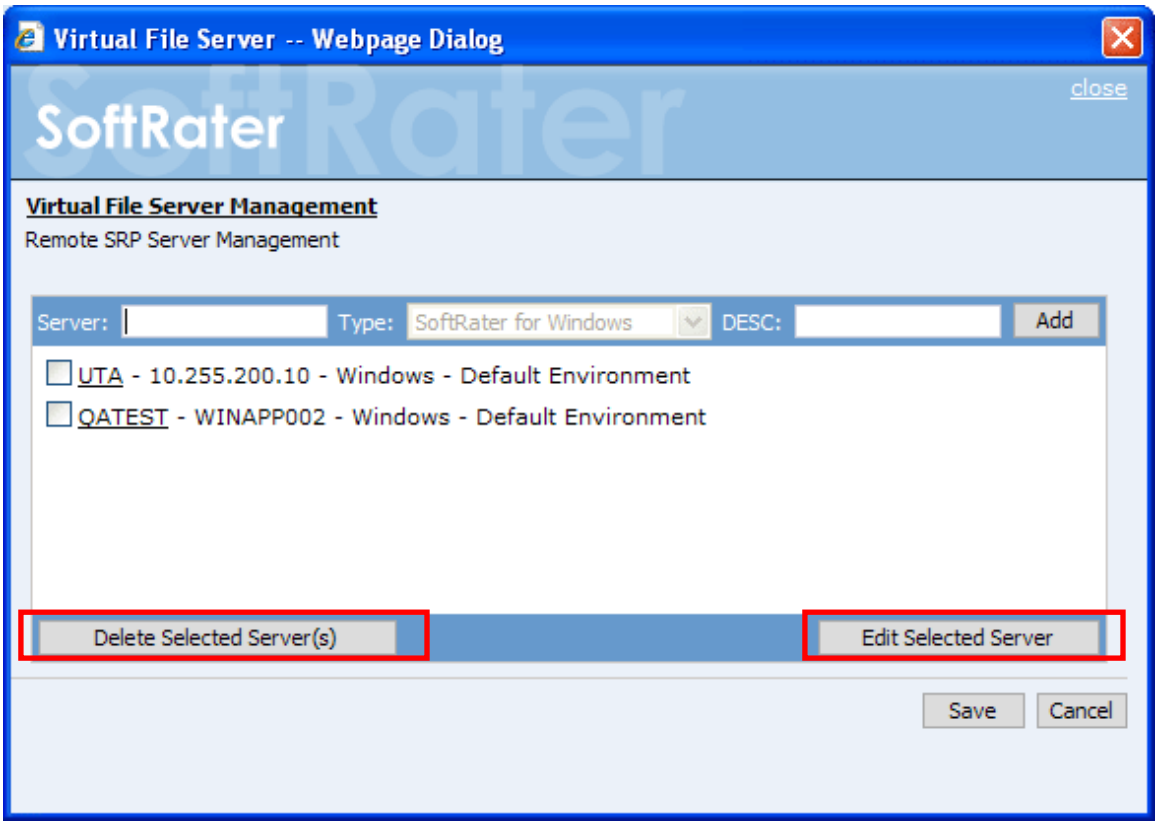


Figure 42 Deleting a Virtual File Server

2. Place a checkmark next to the server(s) you would like to edit or delete.

3. **To edit a server:** Click **Edit Selected Server**. This will bring up the Edit Virtual File Server screen where you can make your edits.

4. **To delete a server:** Click **Delete Selected Server(s)**. The server will be removed from the list immediately. No warning message will be displayed.

5. When you are finished, click **Save**. The configuration subtab will refresh with the updated server information.

ENVIRONMENTS SUBTAB

The Environments subtab is where you will configure the environments that you created on the Configuration subtab. For example, if you created two environments on the Configuration subtab, there will be two environments for you to configure on the Environments subtab.

The Environments subtab should be completed at installation however additions, deletions and changes can be done at any time.

For more on Environments, please locate the Planning Insbridge Guide at http://www.oracle.com/technology/documentation/insurance.html.

Configuring an Environment

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

1. On the Settings tab, select **Environments**.

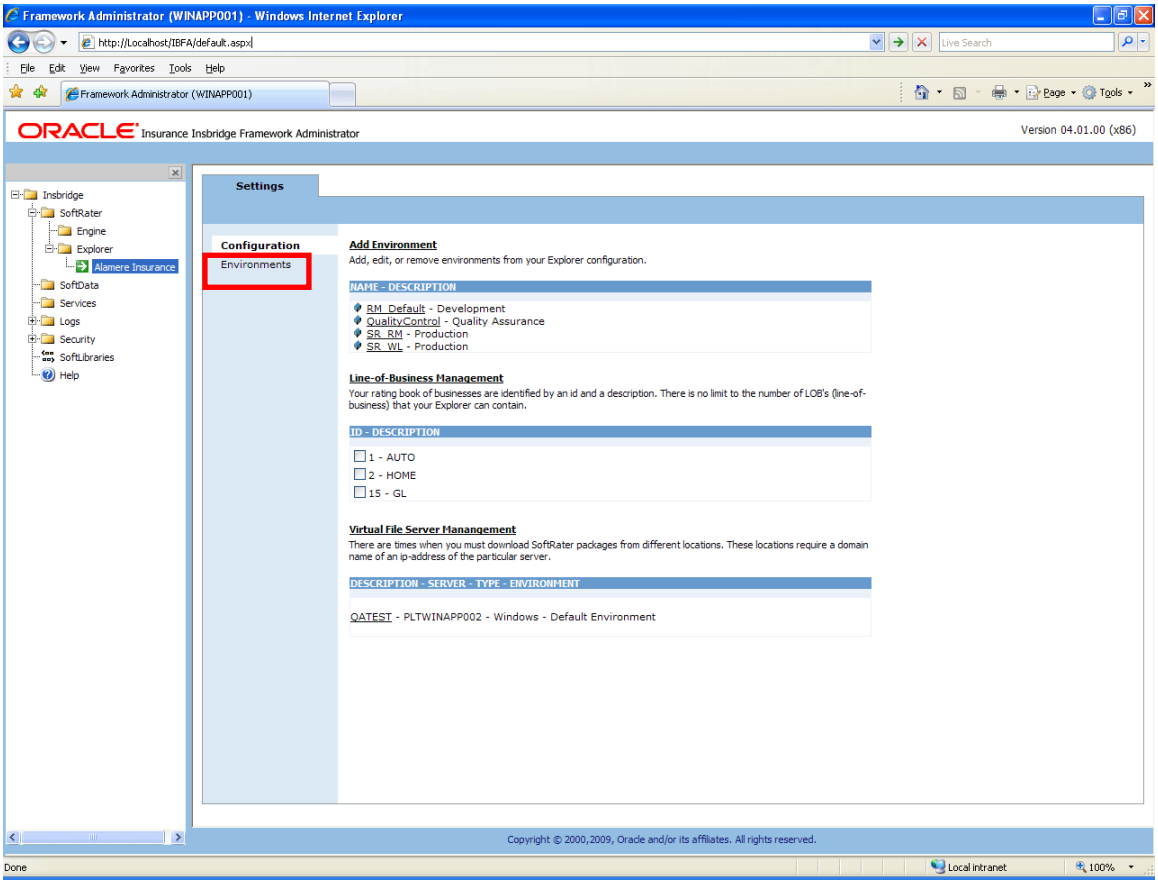


Figure 43 Configuration Subtab for Configuring an Environment

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

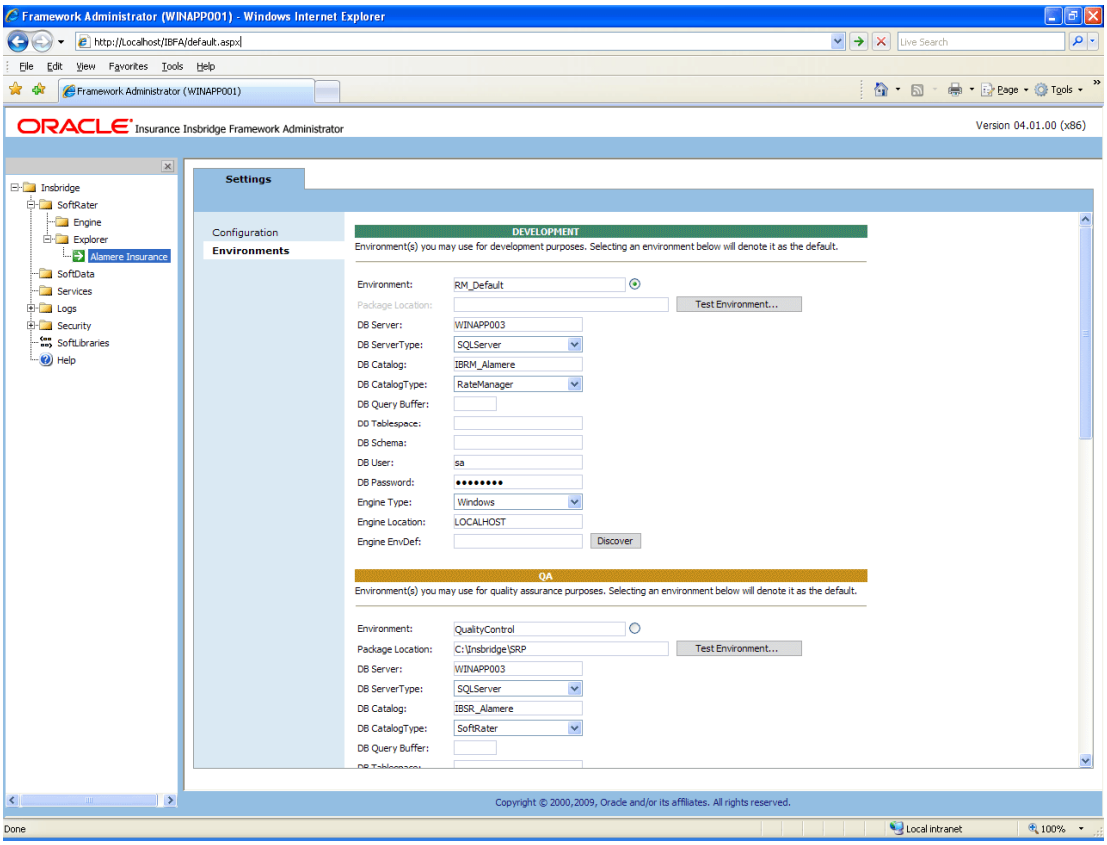


Figure 44 Configuring an Environment

Fields:

Fields must be complete for each environment.

Environment:	The name of the environment. Selecting the radio button next to an environment's name will set it up as the default environment.
Package Location:	Physical location of where the packages should be stored. Click **Test Environment** to validate the permissions on the directory and certify any packages in the directory. The Framework Administrator must have full control of the directory. RateManager environments will not have a package location.
DB Server:	The name of the server that houses the database that packages will be loaded to. For DB2 servers, this is the DB2 Registered Alias Name. For Oracle servers, this is the server name; either IP or DNS will work. The Database listener port number will also need to be appended to the server name if it is something other than the default port. The format for this is: [SERVER NAME]:[PORT NUMBER]
DB Server Type:	The type of server that houses the database. Currently, RateManager and SoftRater support: • SQL Server • Oracle

	• Oracle XE • DB2 • DB2 Mainframe If you select an Oracle XE database server type, a message will be displayed informing you that the schema for the environment has been changed to match the name of the environment. The DB schema cannot be changed.
DB Catalog:	The name of the catalog in the database. For DB2 servers, this is the System DSN Name. For Oracle servers, this is the instance.
DB Catalog Type:	The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.
***DB Query Buffer:**	For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit.
DB Tablespace:	For future use.
***DB Schema:**	The name of the schema that defines the structure of the database. This information may be obtained from the DBA. If DB Server Type Oracle XE is selected, the DB Schema name will be the same as the Environment Name.
DB User:	Username to access the database. This information may be obtained from the DBA.
DB Password:	Password to access the database. This information may be obtained from the DBA.
Engine Type:	The type of SoftRater engine that is used. The available options are: Windows, WebSphere, WebLogic or JBoss.
Engine Location:	The location of the SoftRater engine. If the engine is local to the Framework Administrator (i.e. located on the same server), leave this field as LOCALHOST. If the engine is located on a different server, enter the name in the box. WebSphere, WebLogic or JBoss must also include the port that is being used. • **WebLogic:** Port 7001 • **WebSphere:** Port 9080 • **JBoss:** Port 8080 The format for this is: [SERVER NAME]:[PORT NUMBER]
Engine EnvDef:	This field should remain blank, unless the engine is located on a different server. If the **Engine Location** is set to LOCALHOST, leave this field blank. If the **Engine Location** is not LOCALHOST, this should match the name of the environment on the remote server.

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

Creating a RateManager Environment

A RateManager environment should be completed at installation but can be added at a later time. It is recommended that only one RateManager environment be created.

1. On the Settings tab, select **Environments**.
2. This will open up the Environments subtab. The environments you previously setup will be listed. If an environment is missing, you must return to the Configuration subtab and add it.
3. The **Environment Name** will be complete. No changes are needed.
4. RateManager environments will not have a **Package Location**. No entry will be allowed.
5. Enter in the **DBServer** name or IP address. This is the database server where the RateManager database was restored.
6. The **DB Server Type** will be **SQL Server**.
7. The **DB Catalog** is the name of the RateManager database restored in SQL Server.
8. The **DB Catalog Type** is **RateManager**.
9. **DB Query Buffer**, **DB Tablespace** and **DB Schema** are not required for a RateManager environment.
10. Enter the **DB User** name and **Password**.
11. The **Engine Type** is **Windows**.
12. The **Engine Location** default is **LOCALHOST**. Most RateManger installations have a local engine location. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located. Do not change LOCALHOST to the name or IP address of the local machine.
13. The **Engine EnvDef** default is a blank field. Most RateManger installations do not require an entry in this field. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located.
14. Click **SAVE** to save your entries.

Creating a SoftRater Environment

A SoftRater environment may be completed at installation or can be added at a later time. A SoftRater environment can be on a Windows machine or a Java machine running an application server, such as WebLogic. There is no limit to the number of SoftRater environments that you can have.

1. On the Settings tab, select **Environments**.
2. This will open up the Environments subtab. The environments you previously setup will be listed. If an environment is missing, you must return to the Configuration subtab and add it.
3. The **Environment Name** will be complete. No changes are needed.
4. Enter in the file path where you want packages stored in the **Package Location**. Use the Test Environment option to have the location created for you.
5. Enter in the **DBServer** name or IP address. This is the database server where the SoftRater database was restored or created.
6. Select the **DB Server Type** that you are using.
7. The **DB Catalog** is the name of the SoftRater database restored in SQL Server or created in Oracle or DB2.
8. The **DB Catalog Type** is **SoftRater**.
9. **DB Query Buffer** may be required. For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit

10. **DB Tablespace** is not required for a SoftRater environment.
11. The **DB Schema** is the name of the schema that defines the structure of the database. This information may be obtained from the DBA.
12. Enter the **DB User** name and **Password**.
13. Select the **Engine Type**.
14. The **Engine Location** is the location of where you installed the SoftRater engine. You can use the machine name or IP address. For WebSphere, WebLogic or JBoss, you must also include the port. For example, a WebLogic server may have "WBServerName:7001" as the entry.
15. The **Engine EnvDef** is the machine name if the engine is located on a different server. You can use the machine name or IP address.
16. Click **SAVE** to save your entries.

Creating a SoftRater Oracle XE Environment

A SoftRater environment may be completed at installation or can be added at a later time. An Oracle XE environment must be on the same server as IBFA. Oracle XE cannot be run through an application server, such as WebLogic. All supported engines (WebSphere, JBoss, WebLogic, Windows) in the IBFA Engine dropdown can rate against an Oracle XE database.

When creating and utilizing an Oracle XE environment, naming must be consistent. The names used in IBFA must be used in SoftRater Native. Oracle XE is case sensitive and has a 4GB limit.

Prior to setting up an Oracle XE environment, please run the oracle client on the machine where IBFA and Oracle XE are installed. The oracle client is included the download file from E-Delivery.

1. On the Settings tab, select **Environments**.
2. This will open up the Environments subtab. The environments you previously setup will be listed. If an environment is missing, you must return to the Configuration subtab and add it.
3. The **Environment Name** will be complete. No changes are needed.
4. Enter in the file path where you want packages stored in the **Package Location**. The package location must be on the server where IBFA is located. Use the Test Environment option to have the location created for you. If you have not loaded a package to the XE environment, you may receive an error message instructing you to run the DDLs. DDLs will be run against an XE environment the first time you load a package. You do not need to run the DDLs prior to loading any packages.
5. Oracle XE must be on the same server as IBFA. The **DBServer** is **LOCALHOST**.
6. The **DB Server Type** will be **Oracle XE**. When you select an Oracle XE database server, an information screen will be displayed. The schema will be changed to match the name of the environment.
7. Click **OK**.

Figure 45 Oracle XE Message

8. The **DB Catalog** is the database name. If you are unsure of the name, you can view this information on the Oracle XE database Home Page. Home→Administration→About Database, select settings and click GO. The name will be listed in the database information window.
9. The **DB Catalog Type** is **SoftRater**.
10. **DB Query Buffer** and **DB Tablespace** are not required for an Oracle XE environment.
11. The **DB Schema** was set when you selected the DB Server Type. This information can only be changed if a different DB Server Type is selected.
12. Enter the **DB User** name and **Password**.
13. The **Engine Type** is **Windows**.
14. The **Engine Location** default is **LOCALHOST**. Oracle XE must be on the same machine as IBFA. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located. Do not change LOCALHOST to the name or IP address of the local machine.
15. The **Engine EnvDef** default is a blank field. Oracle XE must be on the same machine as IBFA. If the IBFA engine location is not on the local machine, enter the server name or IP address where the IBFA engine is located.
16. Click **SAVE** to save your entries.

Test Environment

Use the Test Environment to validate package locations and database connections.

Click **Test Environment** to validate the permissions on the directory and certify any packages in the directory. Package directories can be created using the Test Environment options. Enter in the file path where you want packages stored on disk. If the Test Environment option does not find the folder, it will create one for you.

Figure 46 Test Environment

To Test the Environment

1. Click **Test Environment…** The Test Environment window will be displayed.
2. Click **GO** to begin the validation process.
3. A successful complete will result in green checkmarks and the window will close.
4. If any errors are returned, the window will remain open and an error message will be displayed.

There are three result icons:

- A successful validation
- A warning. There may be an issue with the environment. Please verify.
- Failed validation. An error message will be displayed with the error received.

Warning icons may be present when:

- In order for the Framework Administrator to successfully manipulate packages in the location, it must have full control of the directory.
- RateManager environments will not have a package location.

An Oracle XE environment may issue a failed validation message with instructions to run the DDLs. DDLs will be run against an XE environment the first time you load a package.

Discovering Environments

For remote environments, you can click DISCOVER to validate server and engine location. Local environments will not be able to use this function.

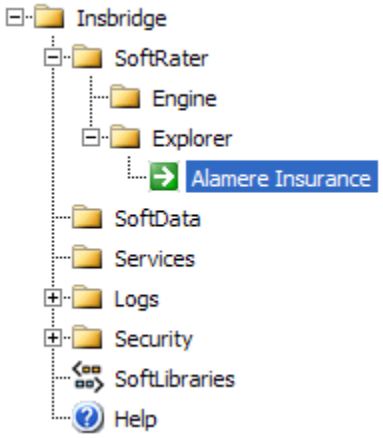
Figure 47 Discover Environment

CONTENT TAB

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

Navigating to SoftRater Explorer Content Tab

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



2. The **Content Tab** will be the landing page after environments have been set up.

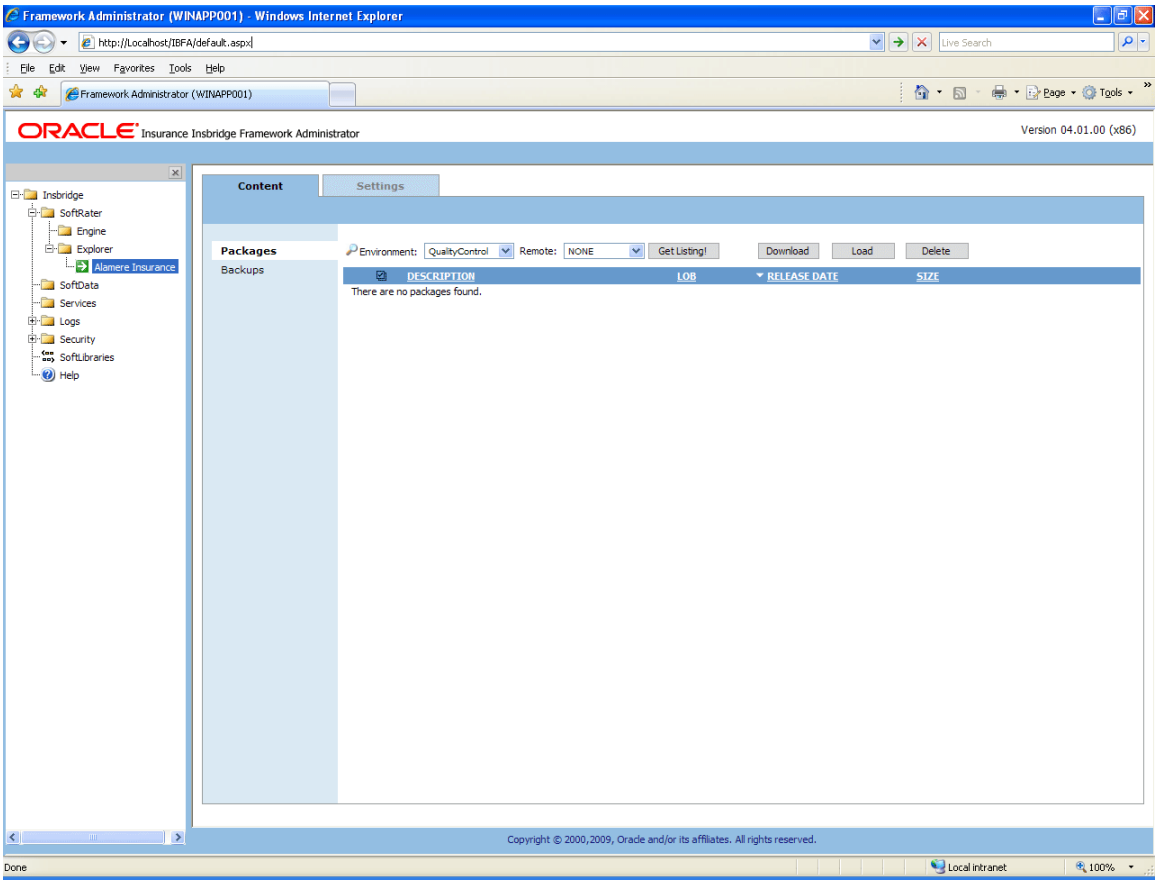


Figure 48 SoftRater Explorer – Content Tab

The Content tab will have two subtabs:

- **Packages** – This subtab is where you manage packages for each environment that you have configured. The Packages subtab will automatically load the list of packages for the default environment.

- **Backups** – This tab is where you manage backups. Backups can be performed on any environment however; the primary purpose of Backups is to create an export for a SoftRater Native instance.

Chapter 6

PACKAGES

The Packages subtab is where you manage packages for each environment that you have configured. The Packages subtab will automatically load the list of packages for the default environment. On this subtab, you can:

- Download Packages
- Load Packages
- Unload Packages
- Move Packages
- Copy Packages
- Delete Packages
- Compare Packages
- View Package Details
- Search for Packages

SoftRater Packages

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

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

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

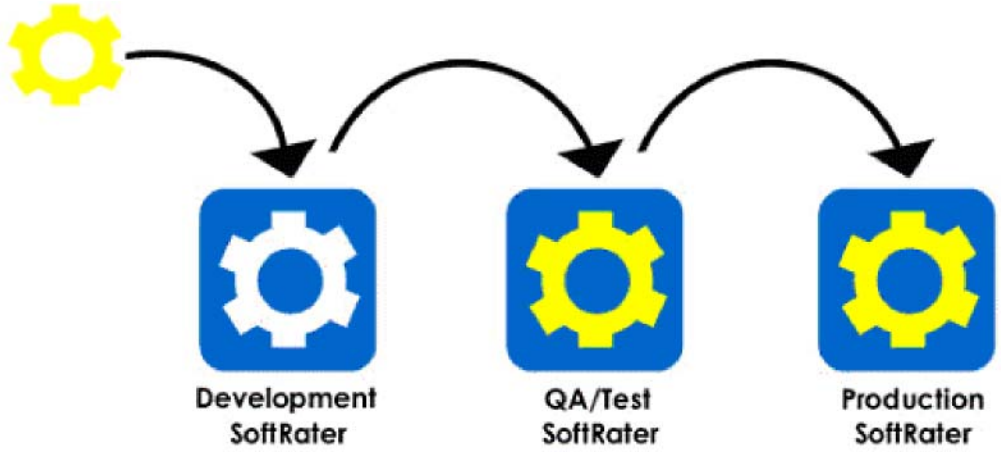
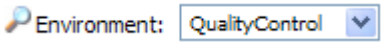
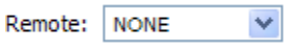
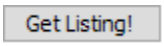
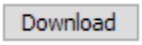


Figure 49 SoftRater Packages

FUNCTIONALITY

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

Functions:

	**Environment:** Select the Environment where you want to view the package listing. SoftRater environments that you have configured on the Settings→Environments Tab will be listed here. If Custom Authentication is being used, only logged in users will see secure environments.
	**Remote:** Select the remote Windows environment where you want to view the package listing. Virtual Files Servers that you have configured on the Settings→Configuration Tab will be listed here. If Custom Authentication is being used, only logged in users will see secure environments.
	**Get Listing!:** After you have selected the environment where you want to view the package listing, click Get Listing to update the list of packages and releases.
	**Download:** Download remote packages and releases to the local environment. For remote environments, select the packages or releases you want to bring in to your local environments and click Download.
	Load: Loads the selected packages or releases to the local database.
	Delete: Removes the selected package or release from the listing.

FIELDS

The Packages subtab displays the packages and releases that have been created for the selected environment. There are six fields in the Packages Listing area.

Releases Listing

Icon Column: Packages and releases may have icons in front to indicate that an action has taken place. The first column displays icons. If there is no icon present, then the package or release is recognized in the selected environment but no action has been taken. There are five package icons:

	A package has been loaded.
	A package contained within this release has been unloaded from the release. Packages are unloaded when an updated version is created. To

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

Checkbox: Used to select a single or multiple packages/releases for downloading, loading or deletion.

Description: Name of the package or release. Package names will include the program number, version and any version name. Release names will include the release status and the number of programs contains within the release.

LOB: The line of business where the package was created. Releases will not have an LOB.

Release Date: The time stamp of the package or release creation.

Size: The size of the package or release.

Right Click Options

Every package or release will have a right click menu. To view the right click menu options, select the package or release you want and right click.

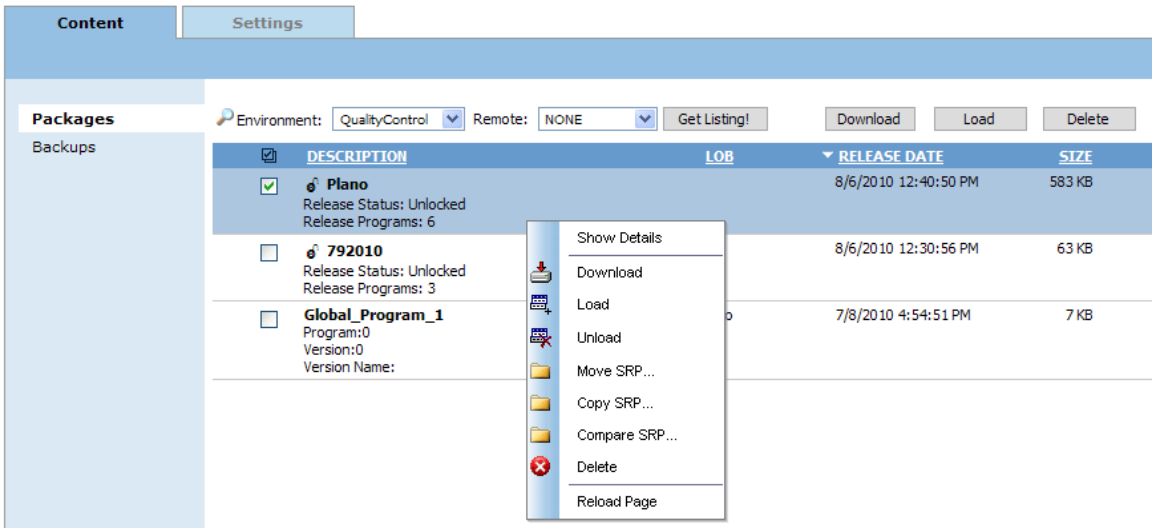


Figure 50 Right Click Menu for the Packages Subtab

Packages or releases will have nine choices:

- **Show Details:** Displays the contents of the package or release on the lower portion of the screen. A single package will contain package comments and links to the Input XML and Output XML. For a release, all packages contained within the release will be listed.
- **Download:** Downloads remote packages to the local environment. For remote environments, select the packages you want to bring in to your local environments and click Download.
- **Load:** Loads the selected packages to local database.
- **Unload:** Unloads the package from the database but not from the package listing.
- **Move SRP:** Moves the SRP from the current environment to an environment you have selected.
- **Copy SRP:** Copies the SRP in the current environment to an environment you have selected.
- **Delete:** Removes the selected package from the listing.
- **Reload Page:** Reloads the page. Use this option when you want to refresh the screen.

Processing Options

Loading, downloading, unloading and deleting will all have processing options:

Sync: This will perform the action you want while you wait. This option is only available if you are working with one package.

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

Delete requests will be processed immediately and will not send notifications when complete.

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

Downloading Packages

Downloading a package copies the package from a remote server to your local server. Only packages that are not on your local server can be downloaded. The remote server that you want to download from must be set up as a virtual machine before you can download. For information on setting up a remote server, see Virtual File Server Management.

To Download a Package

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. The Packages subtab will automatically load the list of packages for the default environment.
3. To get a listing of packages that are available for download, select a remote server and then click **GET LISTING**.
4. The package listing will refresh and packages that are available for download will have a package icon ( ) next to them.

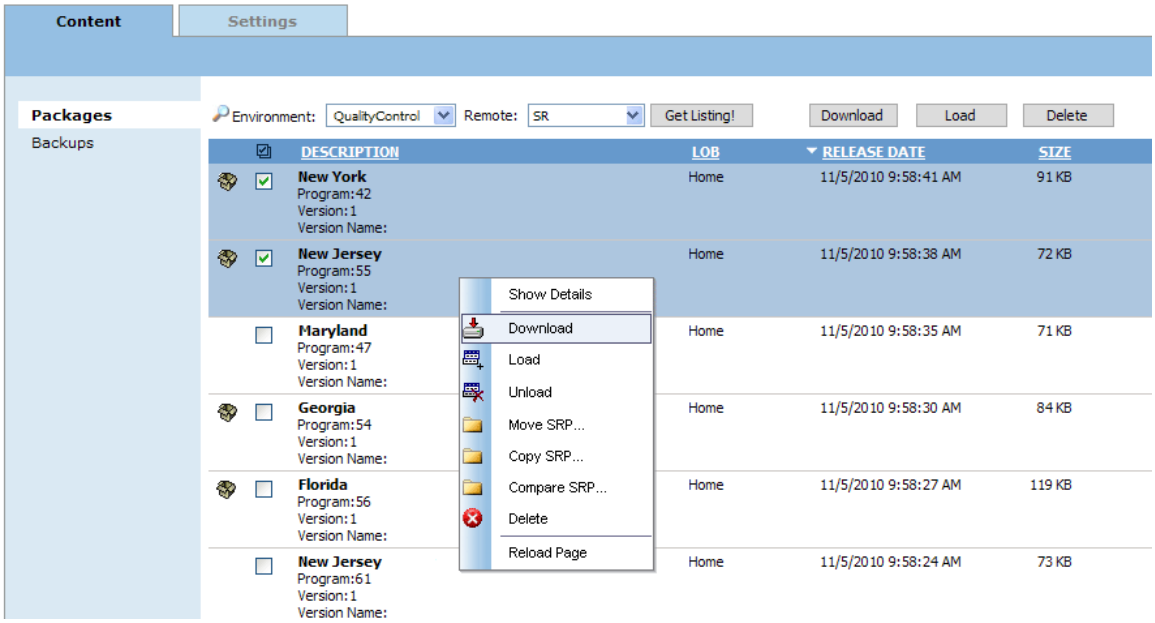


Figure 51 Selecting Packages to Download

5. Select the package(s) you would like to download and click **DOWNLOAD** or right click and select DOWNLOAD. This will open the **Download Packages** window where you can select options for loading the package(s).
6. When you have finished choosing your options, click **OK**.
    - If you chose the Sync download option, the package listing for the remote location should refresh and the download packages icon will be removed from the packages you selected to download. The package listing for the local server will now contain the downloaded packages without the package icon.

- If you chose the Async download option, you should receive a message that the request was successful.

When the process finishes, if you elected to receive an email, you should receive an email with the results. If you elected not to receive an email, nothing will be sent to you.

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

NOTE: *Please make sure that the Insbridge Message Service is running. If the message service is not running, a message will be displayed at the top of the screen.*

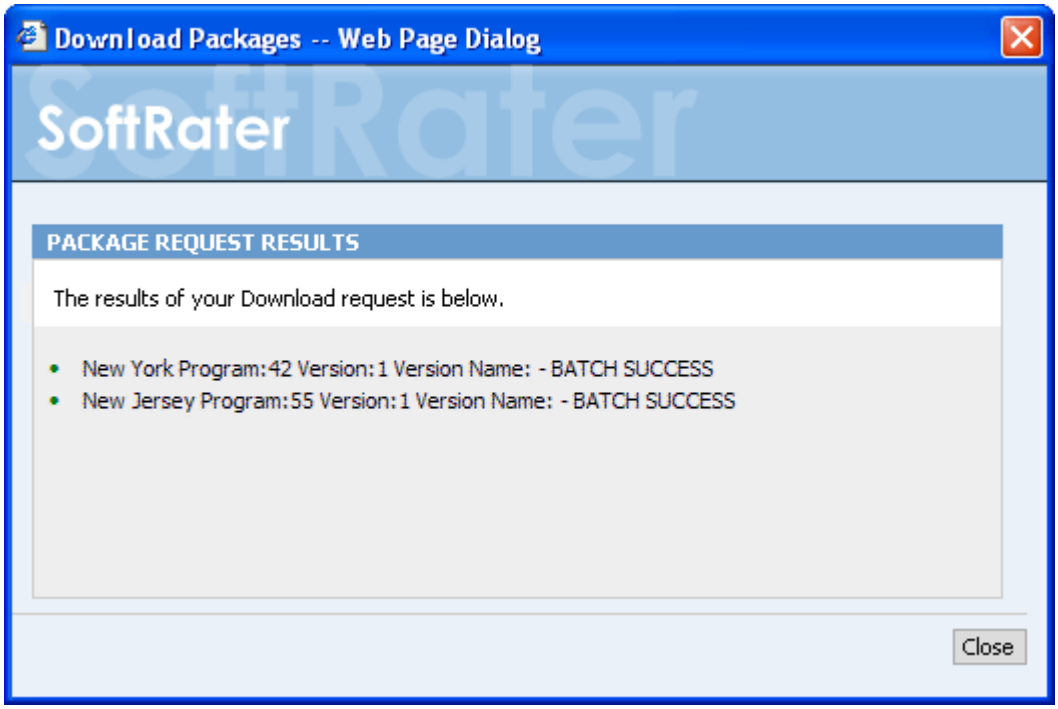


Figure 52 Download Package Results

On the remote server, the download icon will be removed from the packages that have been successfully downloaded. You will not be able to download those packages again.

Loading Packages

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

To Load a Package

1. On **SoftRater Explorer**, select the appropriate subscriber.

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

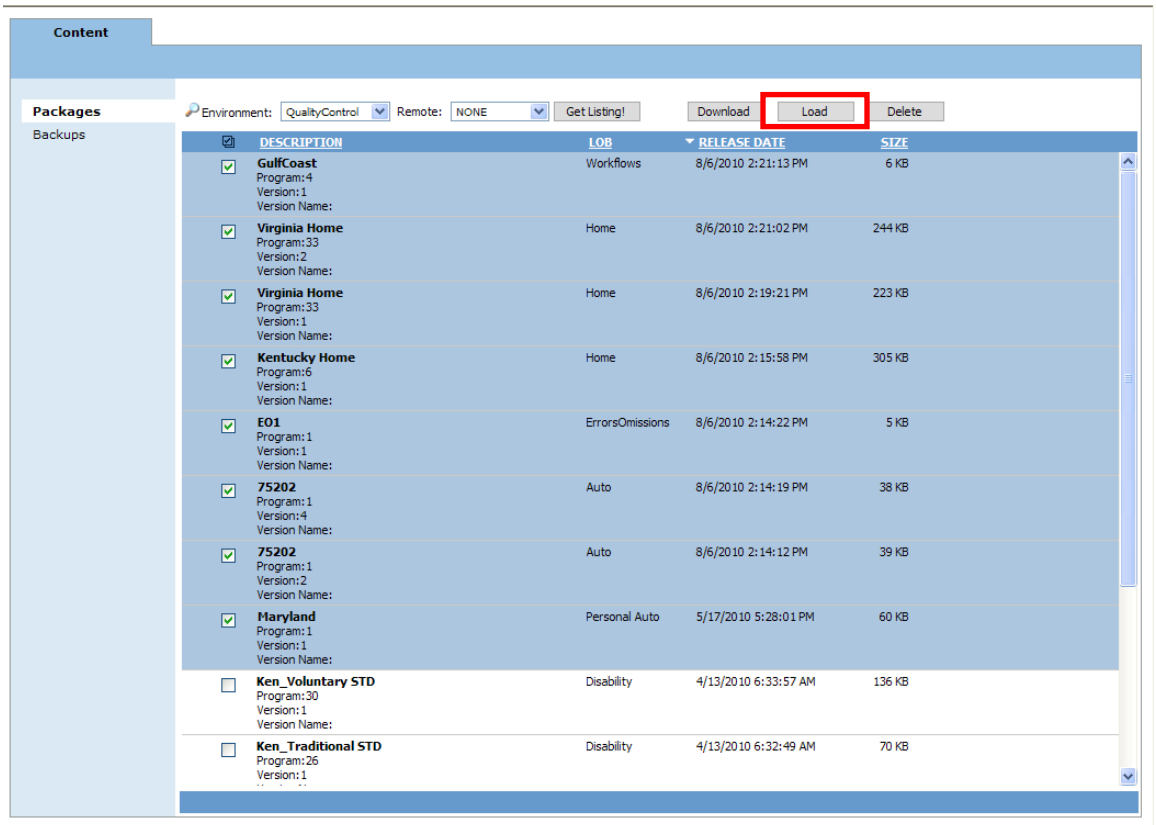


Figure 53 Selecting Packages

3. Select the package(s) you would like to load and click **LOAD** or right click and select LOAD.

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

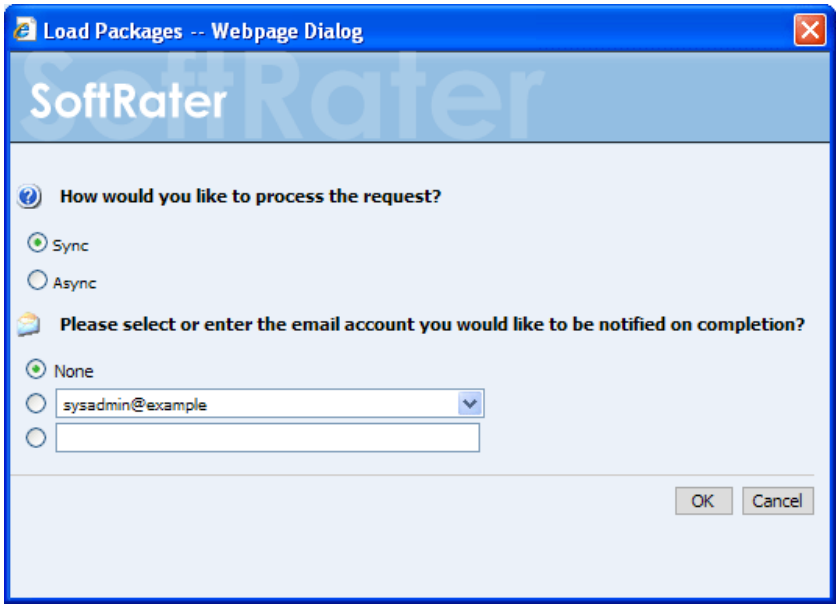


Figure 54 Loading a Package

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

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

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

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

   To verify that the load request has or has not been processed, enter the Services page. Under the Insbridge Message Service→Message Process, select SoftRater – Package. Click View Messages. Any outstanding requests will be listed.

NOTE: *Please make sure that the Insbridge Message Service is running. If the message service is not running, a message will be displayed at the top of the screen.*

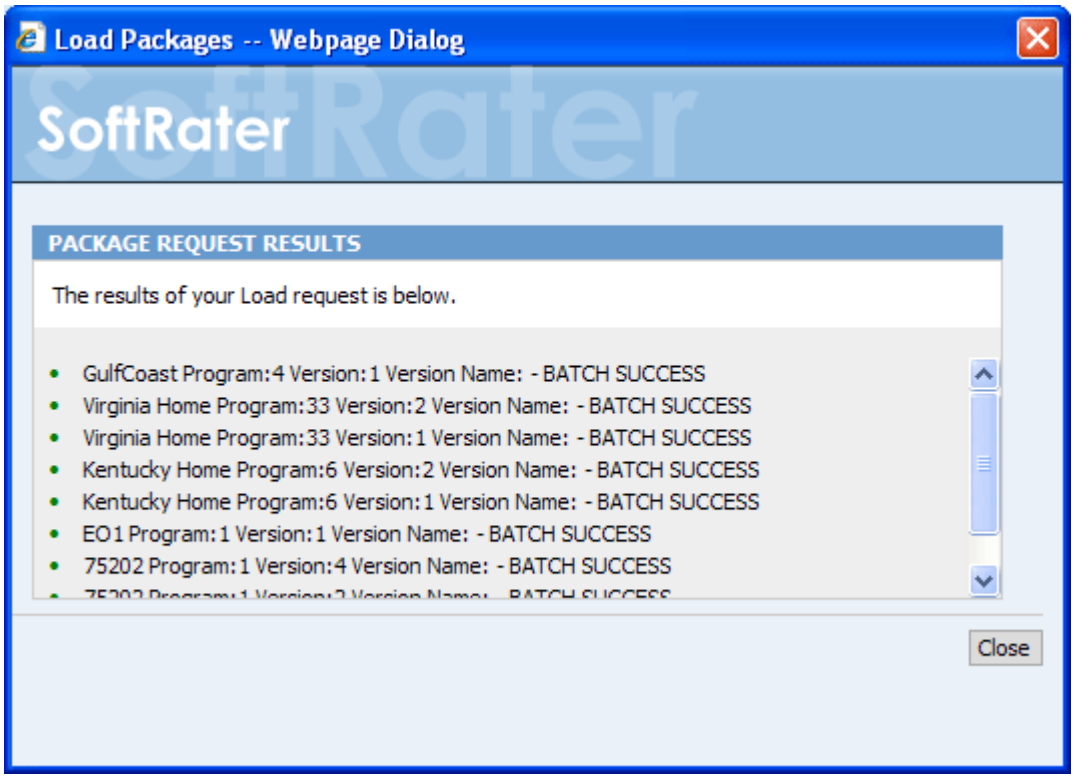


Figure 55 Load Packages Results

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

Unloading Packages

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

To Unload a Package

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. The Packages subtab will automatically load the list of packages for the default environment. You can select a different Environment and click **Get Listing!** to update the list of packages.
3. Select the package(s) you would like to unload.

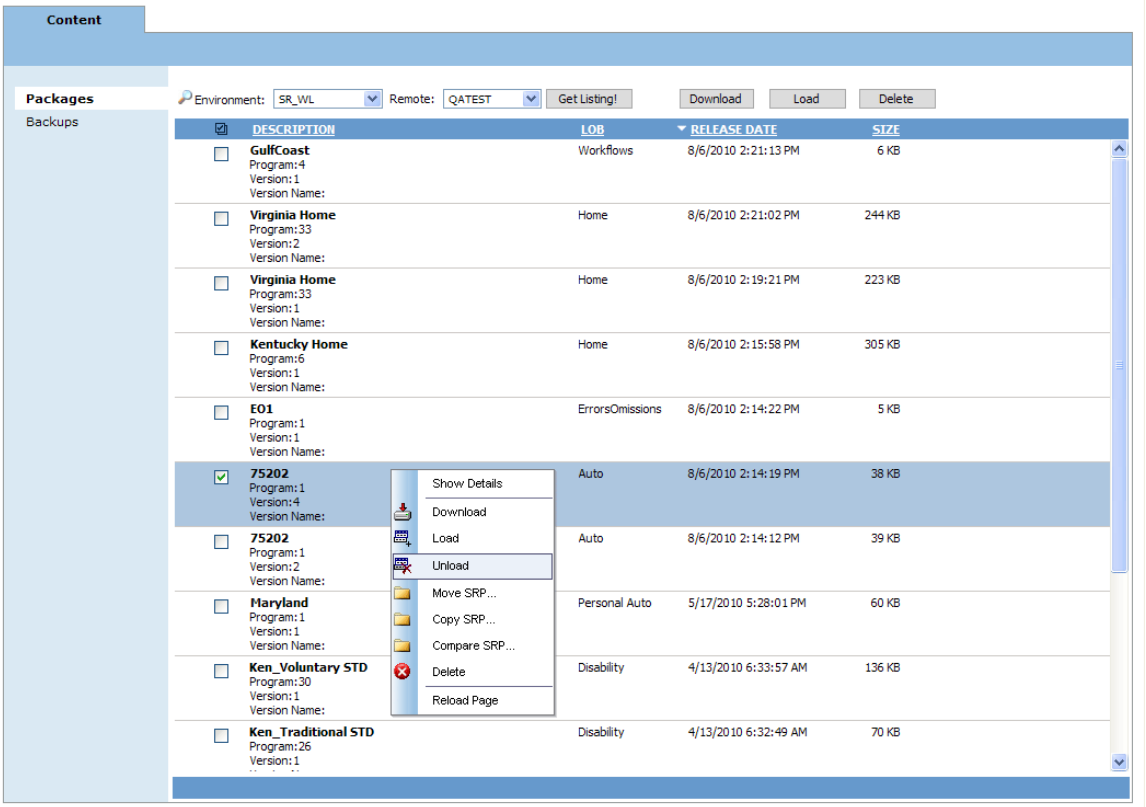


Figure 56 Selecting Packages to Unload

4. Right click one of the selected packages and choose **Unload** from the menu.
5. When you have finished choosing your options, click **OK**.
    - If you chose the Sync unload option, the package listing should refresh and the unloaded package will no longer have an icon ( ) next to the name.

- If you chose the Async unload option, you should receive a message that the request was successful.

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

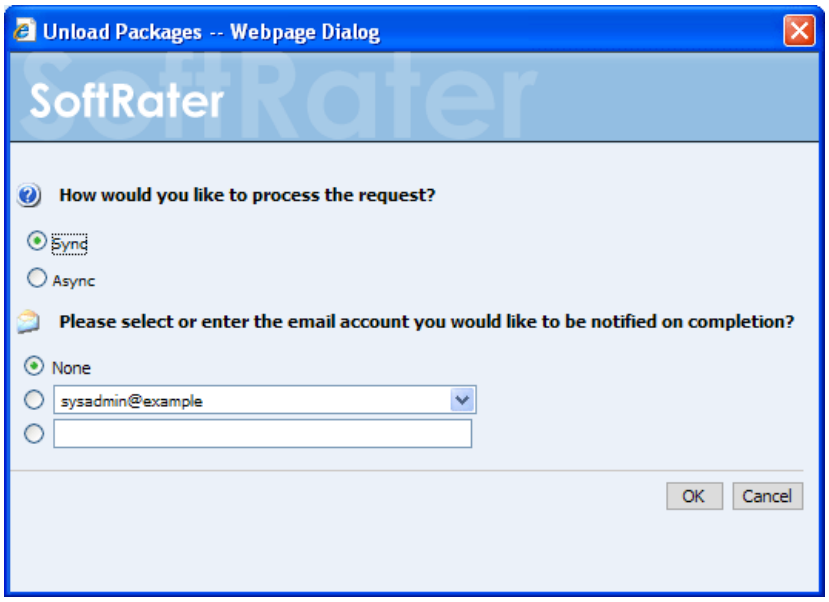


Figure 57 Unloading SoftRater Packages

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

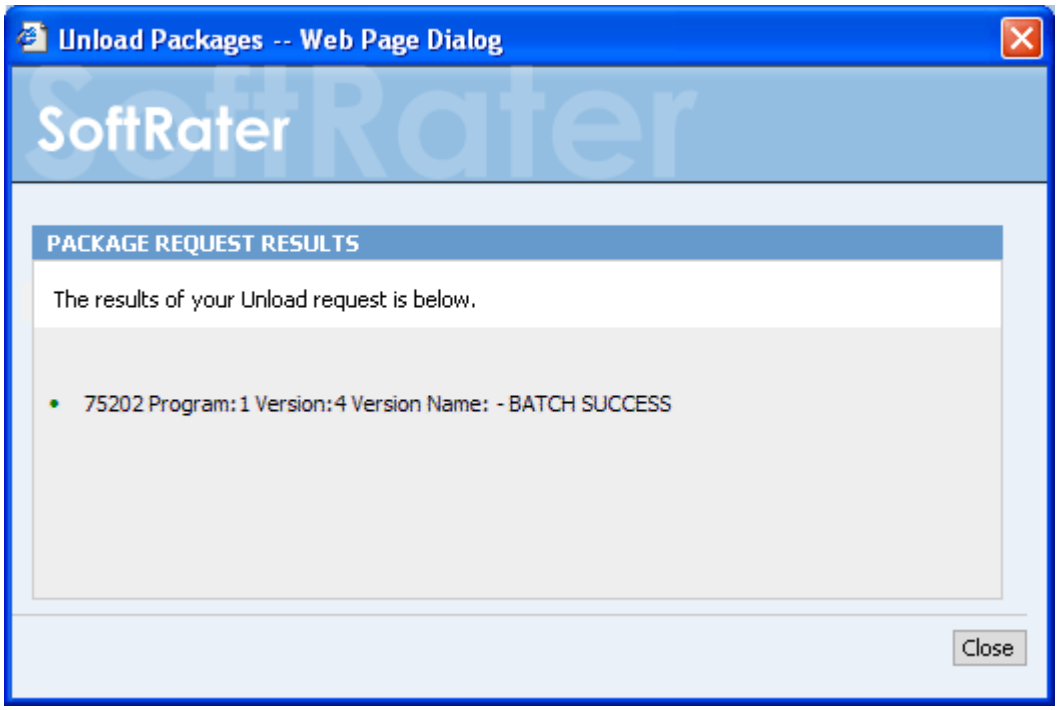


Figure 58 Download Package Results

Moving Packages

Moving a package works the same as moving a file on your hard drive. The package will be removed from the current environment and moved to the selected environment. Selected environments are environments that have been configured on the Settings tab that have:

- A DB Catalog Type of SoftRater
- A configured Package Location that is different from the current environment
- Do not already have the same package in that location

For example, if you have a SoftRater environment with a package location of C:\Insbridge\packages, you could not copy or move a package to another SoftRater environment if it also used the C:Insbridge\package package location on the same machine.

To Move a Package

1. On **SoftRater Explorer**, select the appropriate subscriber.

2. The Packages subtab will automatically load the list of packages for the default environment. You can select a different environment and click **GET LISTING** to update the list of packages.

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

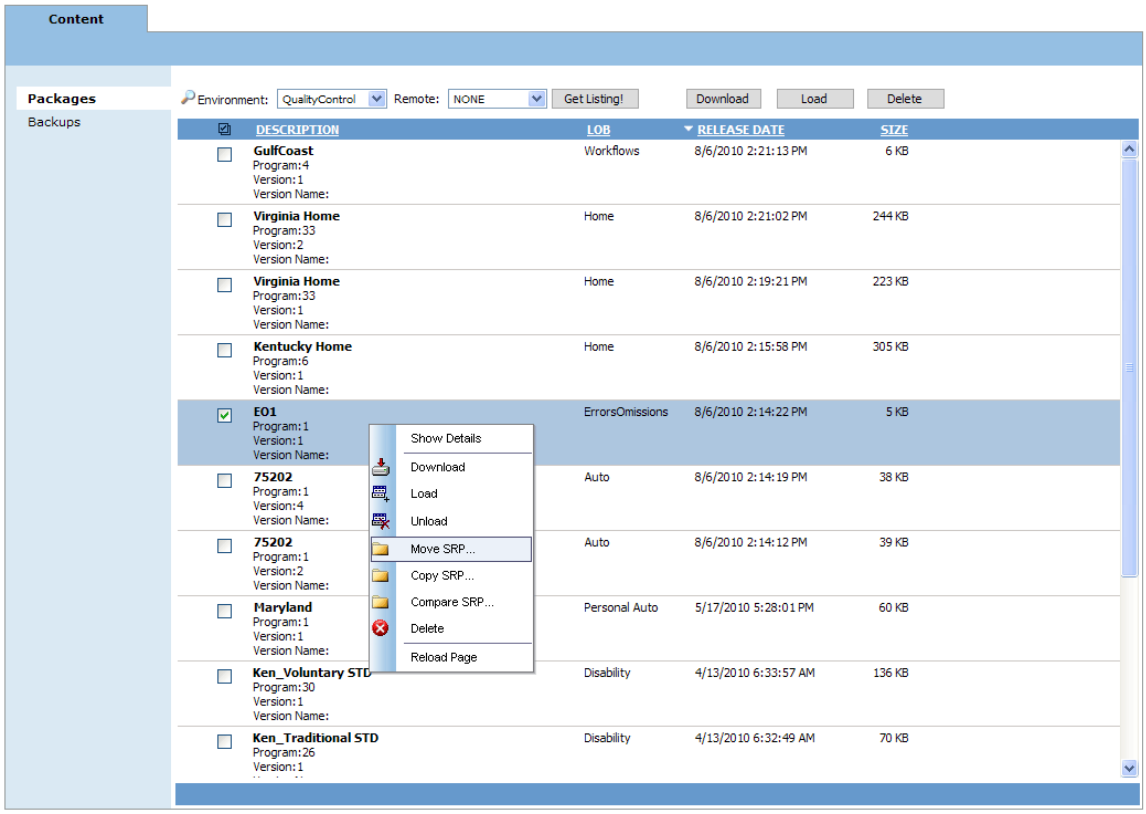


Figure 59 Selecting Packages to Move

4. Right click one of the selected packages and choose **Move SRP…** from the menu. This will bring up the Move SoftRater Package screen.

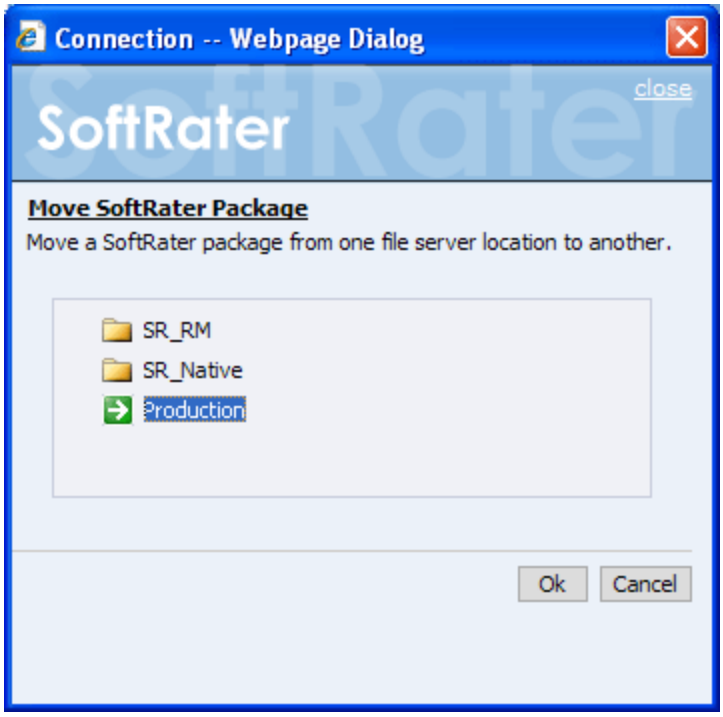


Figure 60 Moving SoftRater Packages

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

Copying Packages

Copying a package works the same as copying a file on your hard drive. The package will be copied from the current environment and pasted in the selected environment. Selected environments are environments that have been configured on the Settings tab that have:

- A DB Catalog Type of SoftRater
- A configured Package Location that is different from the current environment
- Do not already have the same package in that location

To Copy a Package

1. On **SoftRater Explorer**, select appropriate subscriber.

2. The Packages subtab will automatically load the list of packages for the default environment. You can use select a different environment and click **GET LISTING** to update the list of packages.

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

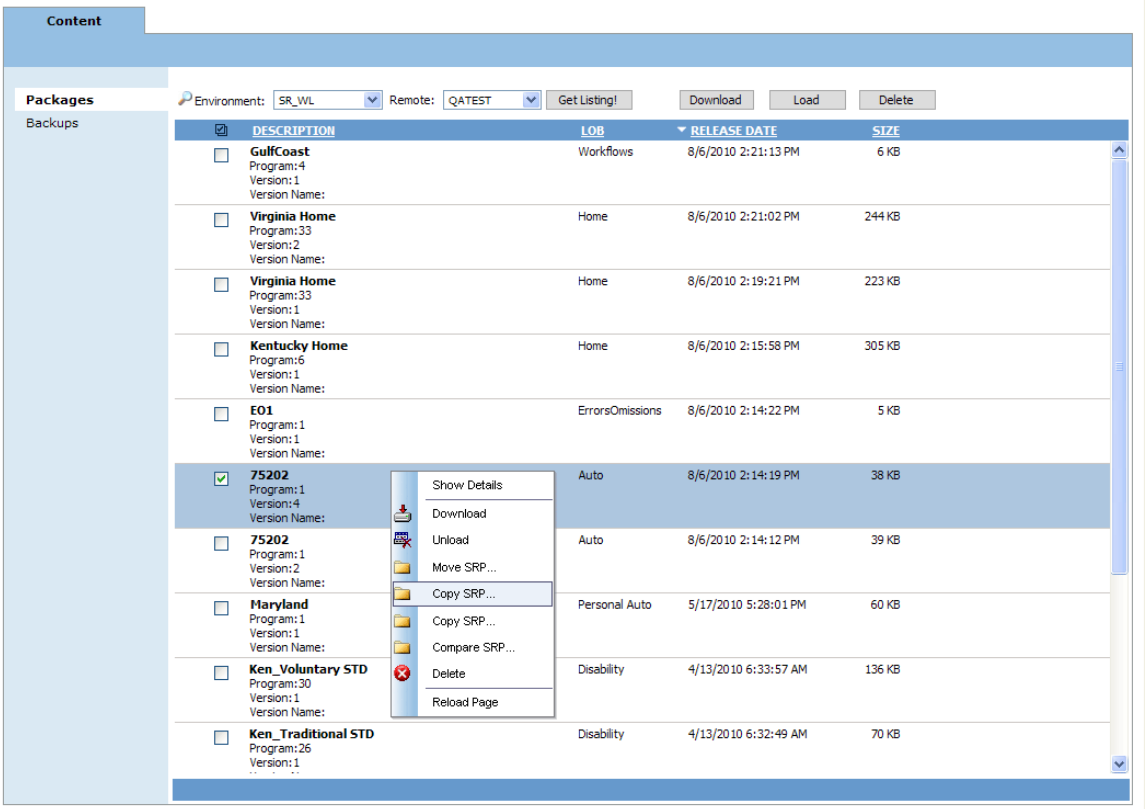


Figure 61 Selecting Packages to Copy

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

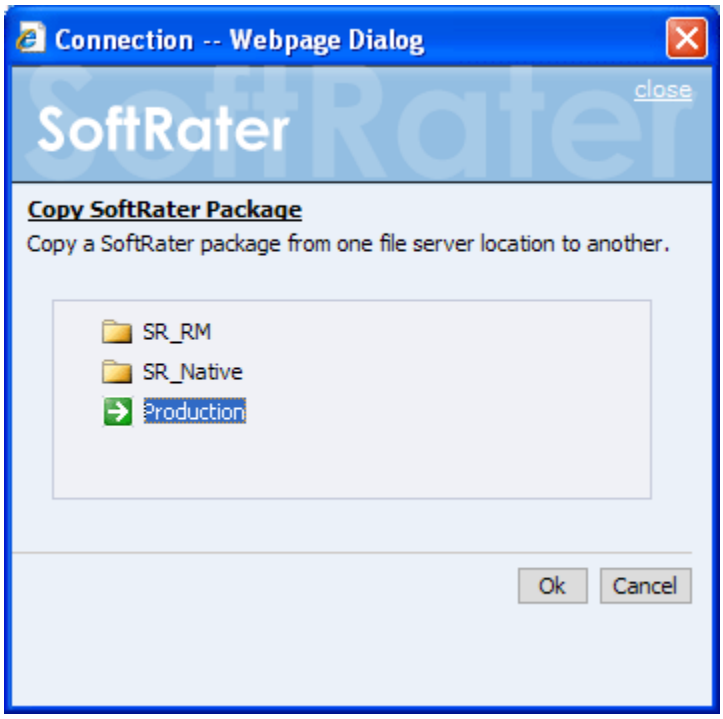


Figure 62 Copying SoftRater Packages

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

Deleting Packages

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

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

To Delete a Package

1. On **SoftRater Explorer**, select the appropriate subscriber.

2. The Packages subtab will automatically load the list of packages for the default environment. You can select a different environment and click **GET LISTING** to update the list of packages.

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

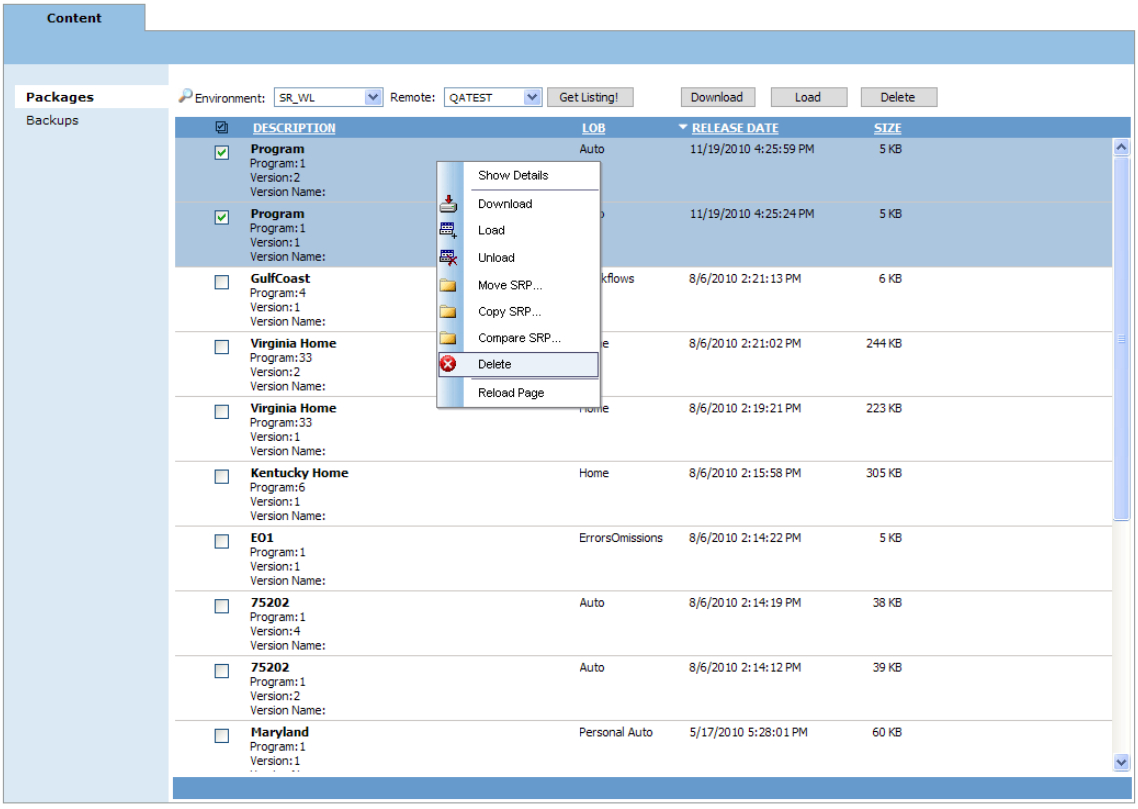


Figure 63 Selecting a Package to Delete

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

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

    - If you chose the Sync delete option, the package listing should refresh and the deleted packages will have been removed from the listing.

    - If you chose the Async delete option, the delete will be done as a batch.

Deletes are performed immediately. When the delete process finishes, an email notification will not be sent. The package listing will be refreshed and the deleted packages will have been removed from the listing.

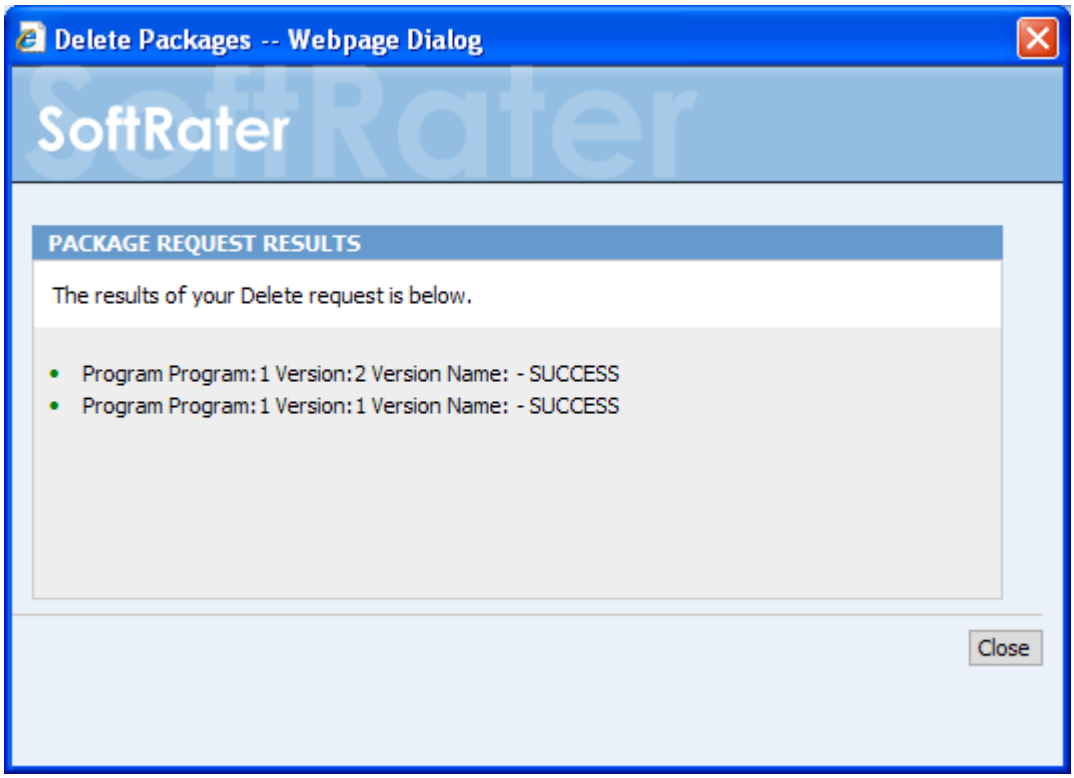


Figure 64 Deleting SoftRater Packages Results

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

To verify that the delete request has or has not been processed, enter the Services page. Under the Insbridge Message Service→Message Process, select SoftRater – Package. Click View Messages. Any outstanding requests will be listed.

NOTE: *Please make sure that the Insbridge Message Service is running. If the message service is not running, a message will be displayed at the top of the screen.*

Compare SRP Report

The Compare SRP report is a Program Difference Report that compares two different packages in IBFA. The differences that will be recognized are:

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

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

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

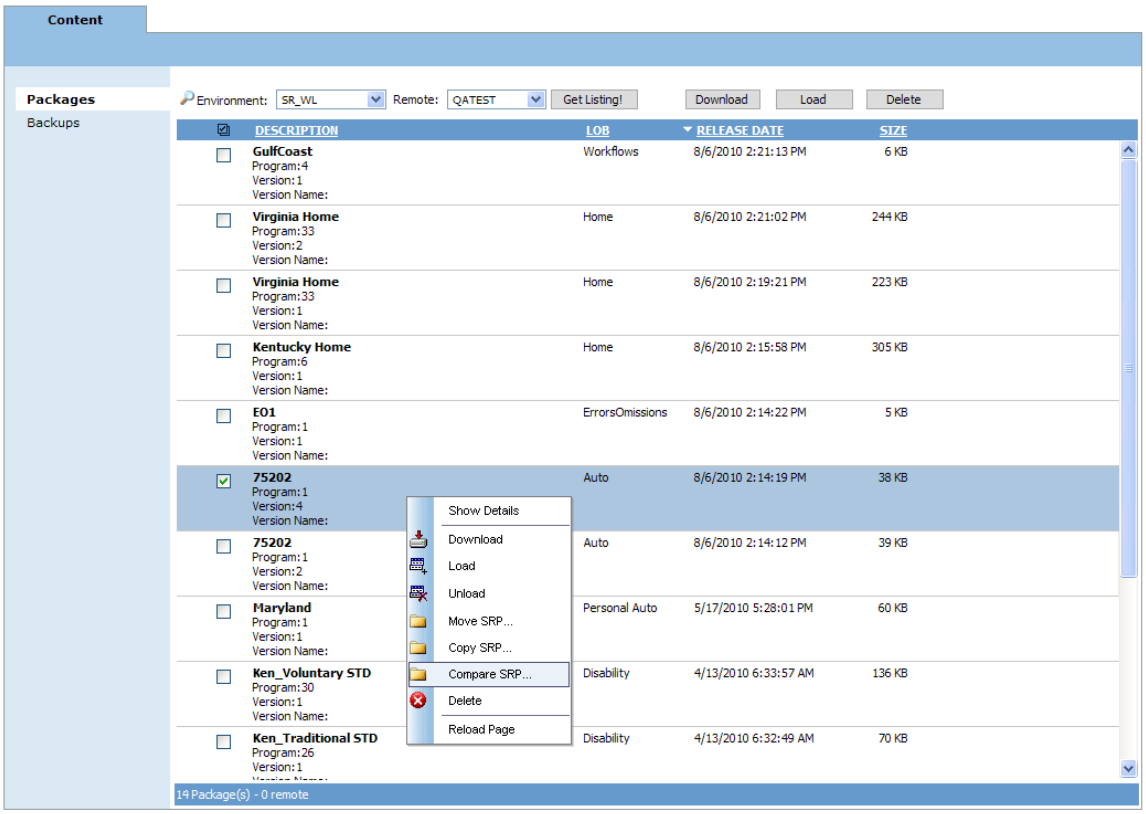


Figure 65 Comparing Packages

Running a Package Difference Report

1. On **SoftRater Explorer**, select the appropriate subscriber.

2. The Packages subtab will automatically load the list of packages for the default environment. You can select a different environment and click **GET LISTING** to update the list of packages.

3. Select a program where you want to run a Program Difference Report.

4. Right click and Select **Compare SRP** from the menu. The Program Difference Report wizard will be displayed.

5. Select the **Baseline SoftRater Package**. All versions will be listed. This is the version that will be the baseline that the other version is compared against.

6. Select the **Comparison SoftRater Package**. All versions will be listed. This is the version that will be compared. You can select any version of the program, either older or newer.

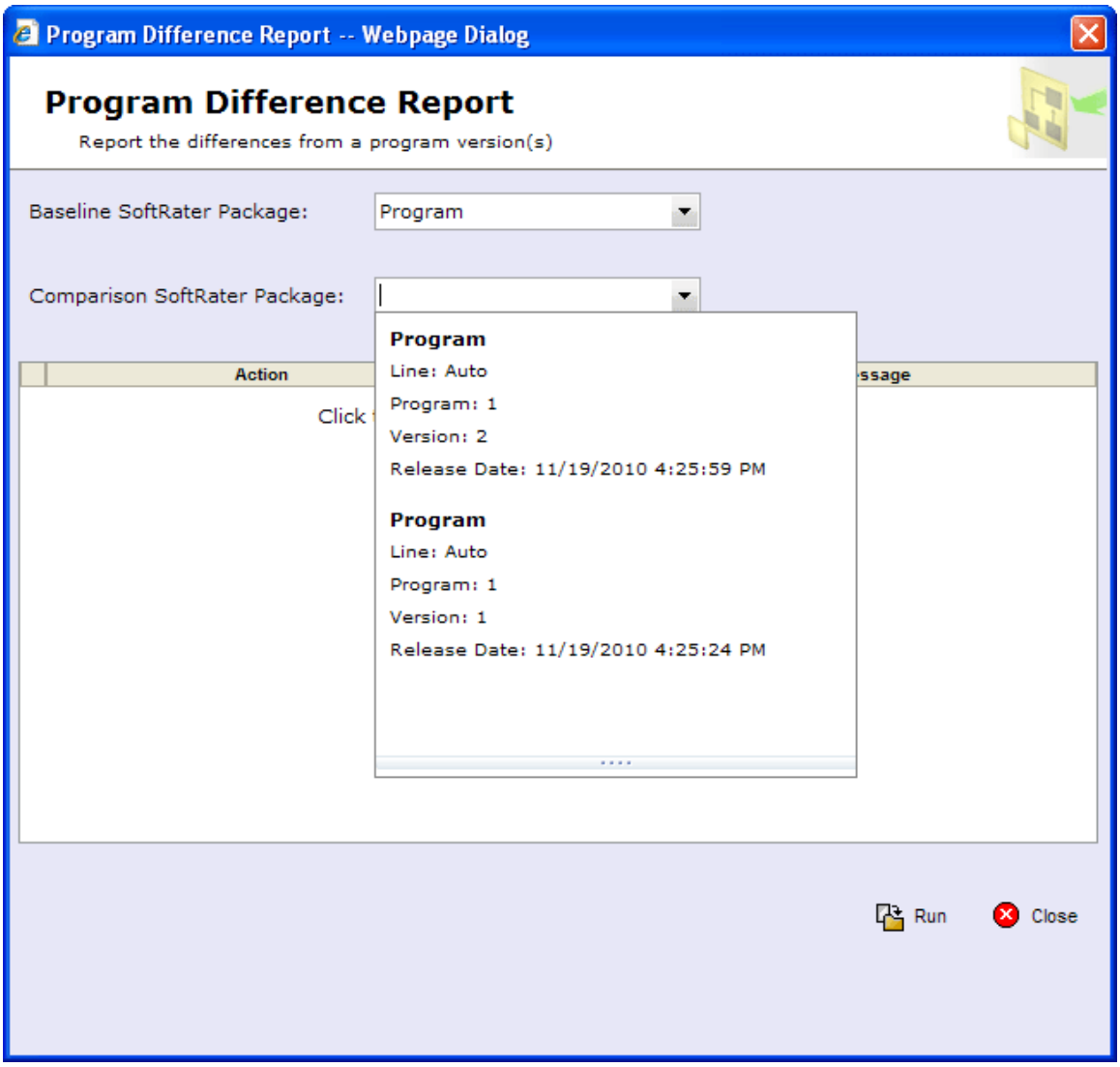


Figure 66 Program Difference Report Select

7. Click **RUN**. This will start the report. The progress will be displayed as the report runs.

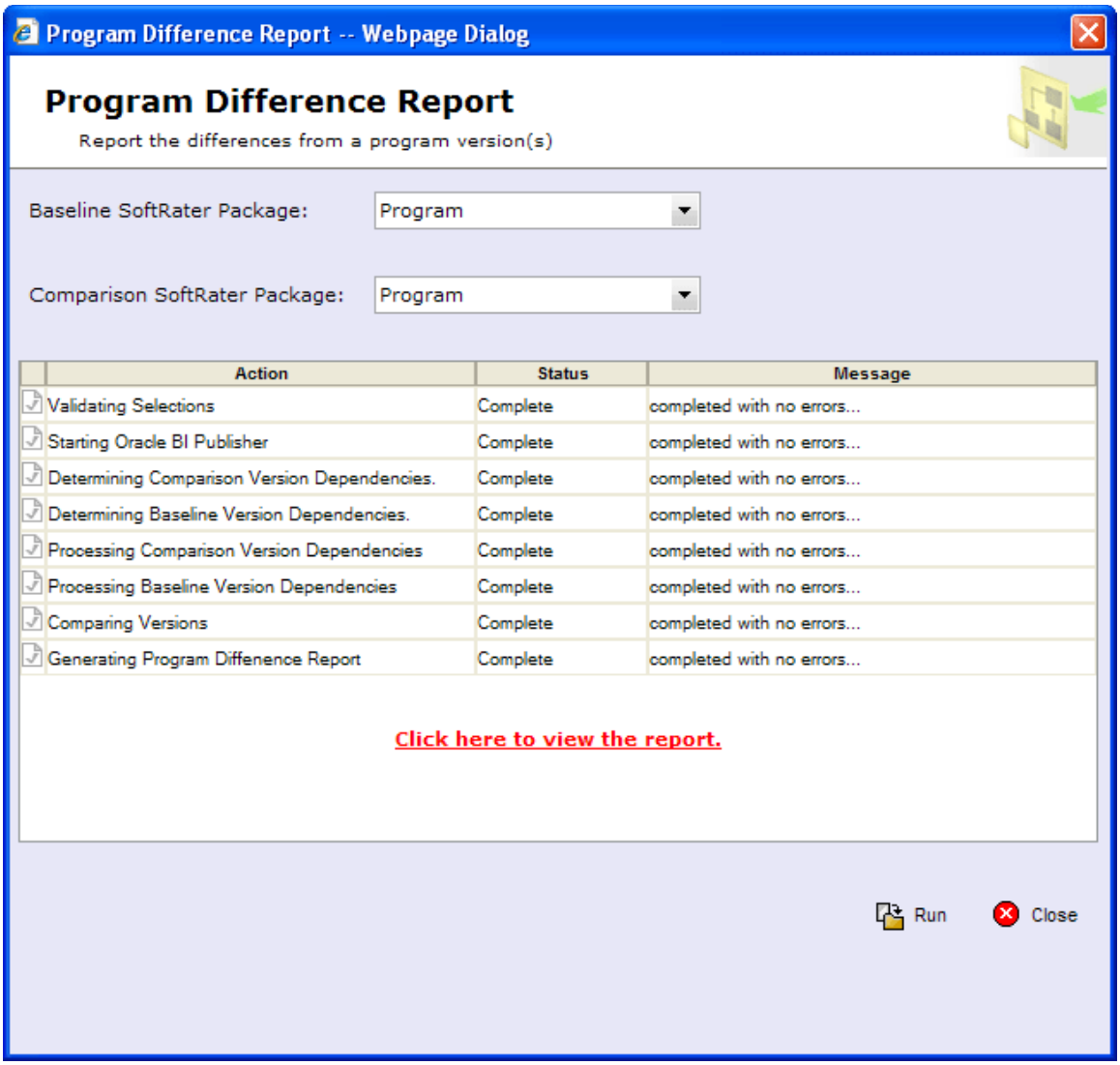


Figure 67 Completed Program Difference Report

8. When the report is complete, click on the "**Click here to view the report**" link.

9. The report will be displayed in the Insbridge Document Viewer. Your report will be generated in a moment. Reports can be saved to your local drive or network or printed. No editing can be done on the Insbridge Document Viewer.

An error message will be generated if any errors occur when running the report.

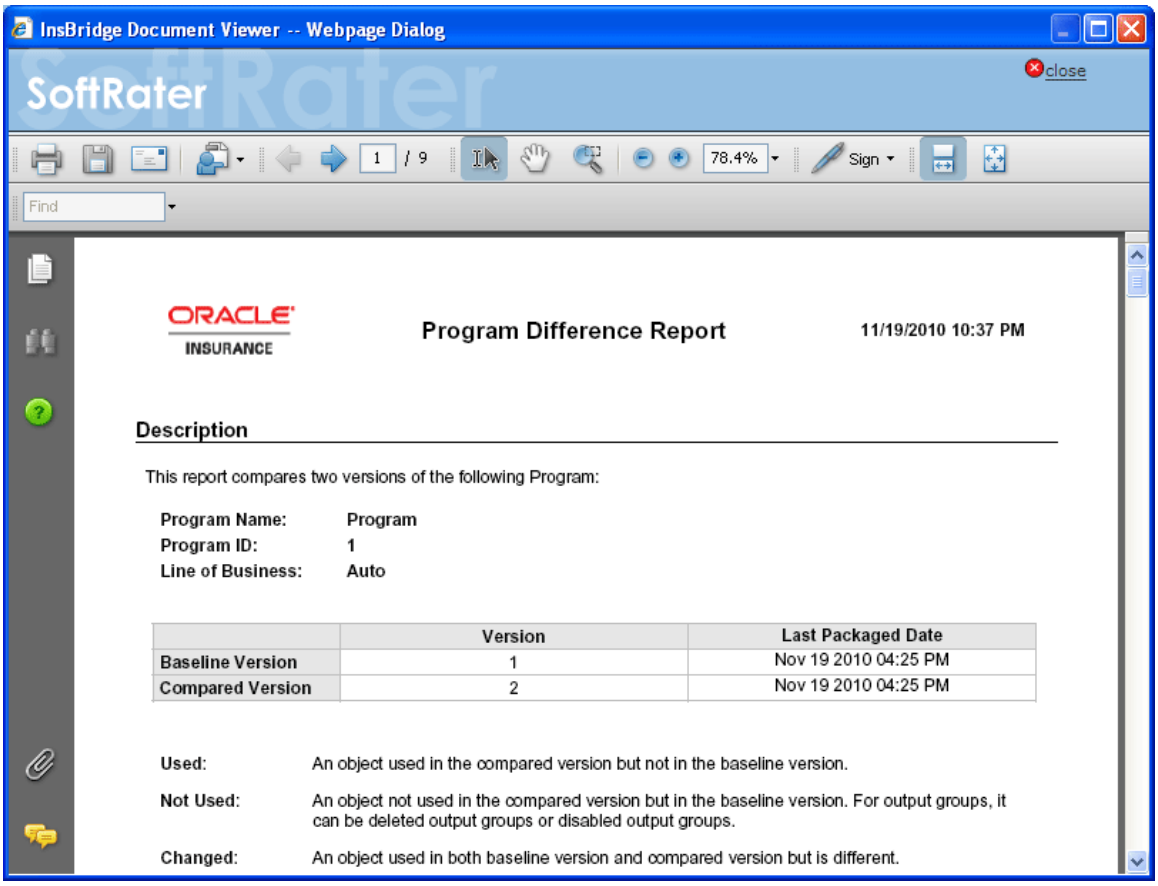


Figure 68 Program Difference Report

NOTE: *OBI Publisher must be installed and running in order for Package Difference Reports to be displayed. If you receive an OBI Publisher error, please see* OBI Publisher *on page 98.*

Viewing Package Details

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

To View Details about a Package

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. Select the package you would like to see details about.
3. Right click the selected package and choose **Show Details** from the popup menu.

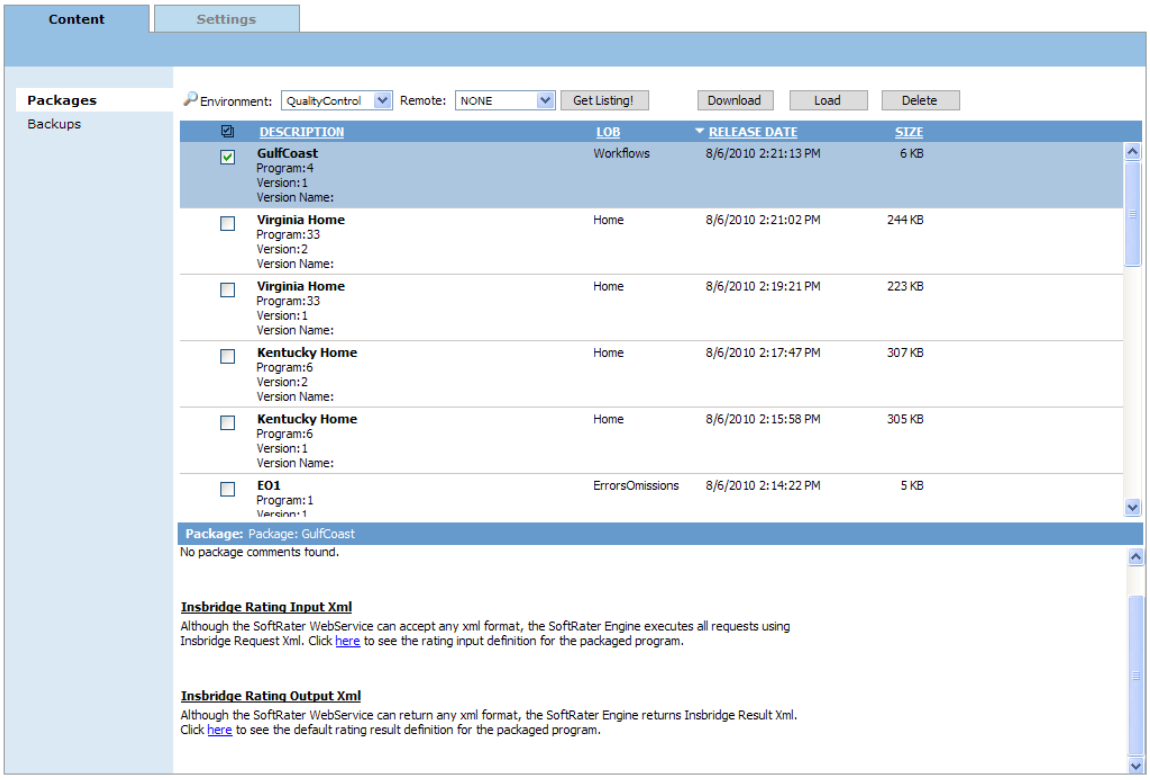


Figure 69 Selecting a Package to View Details

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

Details for Viewing

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

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

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

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

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

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

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

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

Release Details

Release details also can be viewed. Release details are a listing of all the packages contained within that release.

1. Select the release where you want to view the listing of packages.
2. Right click and select Show Details.
3. The lower portion of the screen will display the packages contained within the release along with package comments.

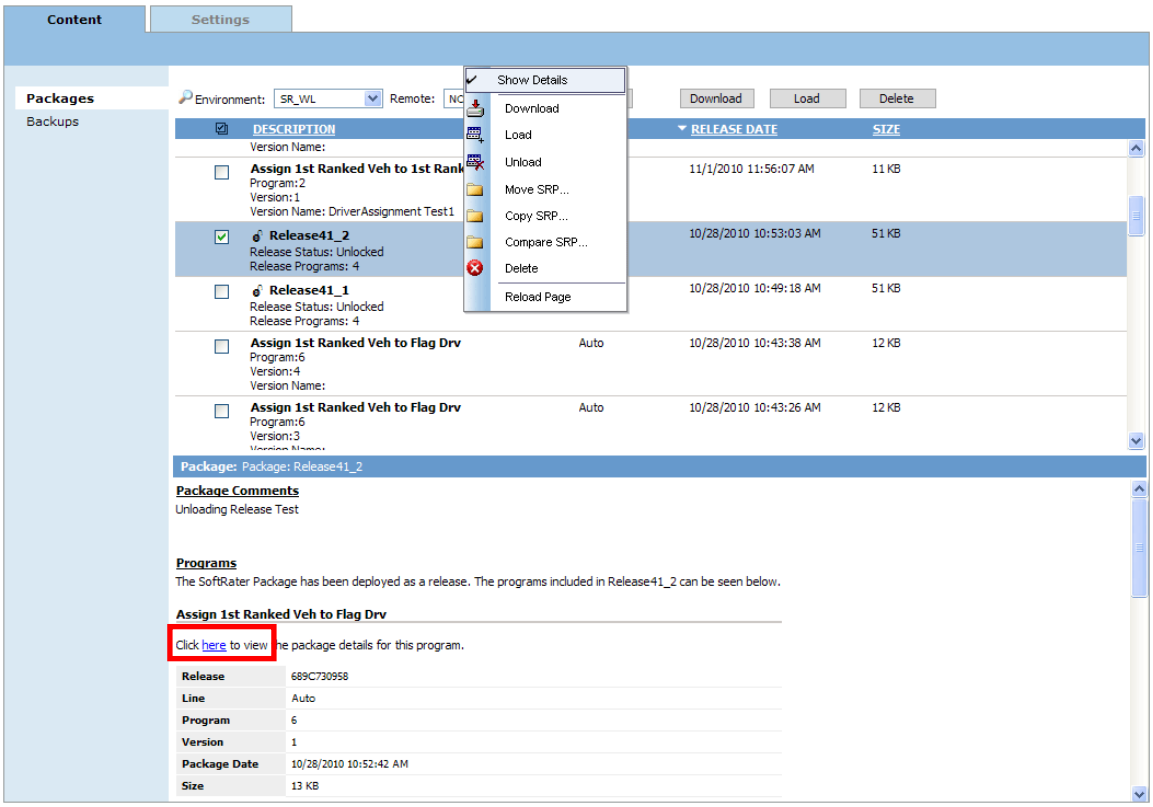


Figure 70 Release Details

Details for each package within the release can be viewed by clicking the here link located within the package listing.

Searching for Packages

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

To Search for a package

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. The Packages subtab will automatically load the list of packages for the default environment.
3. Click the magnifying glass icon ( ) next to Environment to expand the search toolbar.

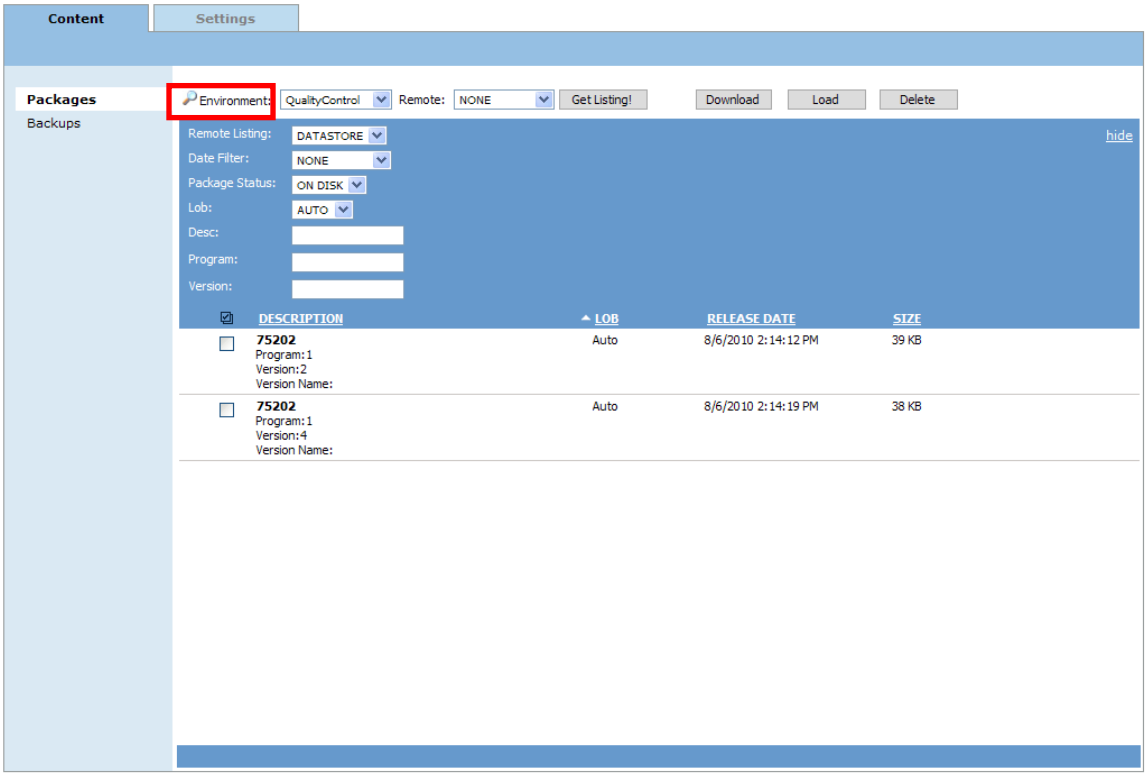


Figure 71 Searching for a Package

Search Options

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

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

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

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

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

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

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

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

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

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

4. Once you have entered your search options, click **GET LISTING**.

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

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

BACKUPS

The Backups subtab is where you will manage environment backups. Environment Backups can be created for disaster recovery processes, SoftRater environment migration, customer support inquiries, or for use in a SoftRater Native remote environment.

SoftRater native is a library module designed to provide remote rating services without accessing the local IBRU system. SoftRater Native can be integrated in a custom UI or data capture system that would allow for a remote instance of SoftRater to be utilized. This would assist customers in rating where connection to the main IBRU system is not desired or possible.

Database backups can be created on any environment at any time. The Backups subtab allows you to:

- Create Backups
- Delete Backups
- Save Backups to your local hard drive or network
- View Backup details
- View Backups created by environment

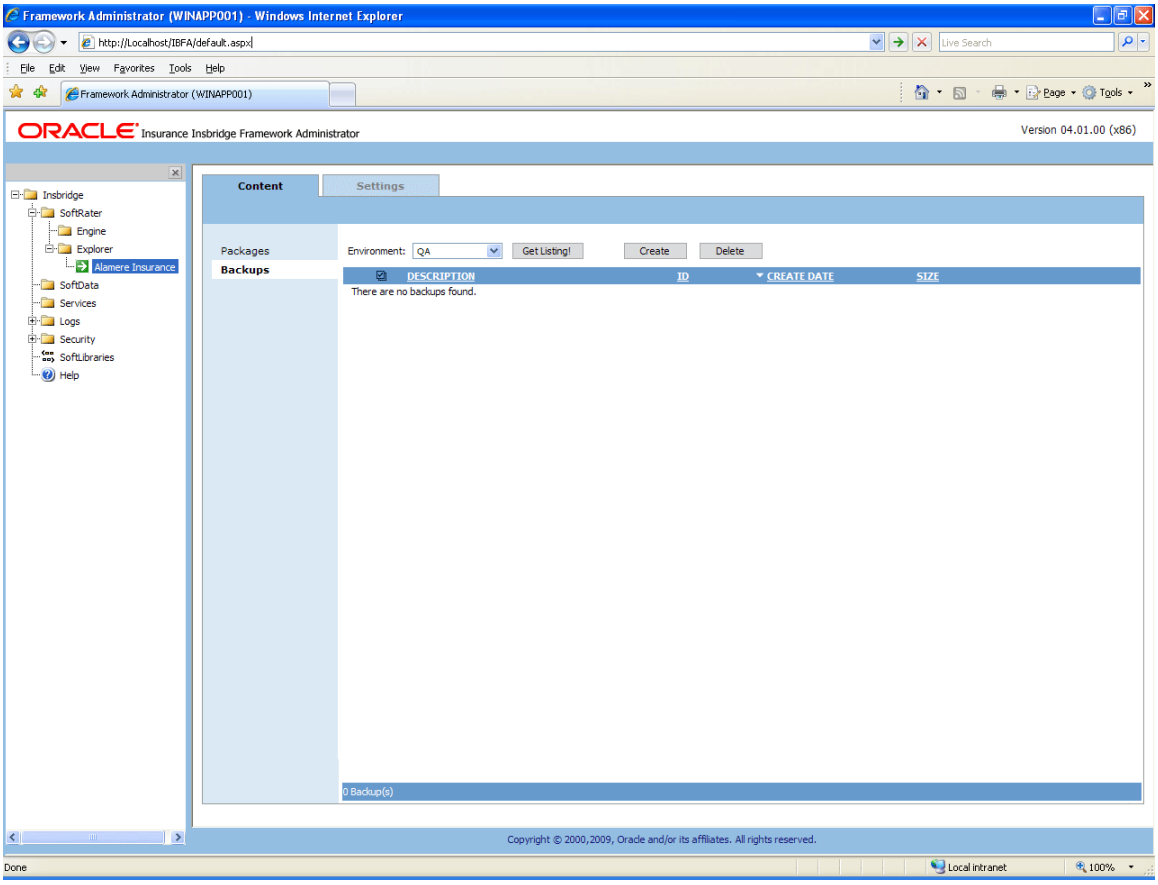


Figure 72 Backups

FUNCTIONALITY

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

Functions:

Environment: QualityControl	**Environment:** Select the Environment where you want to view the backup listing. SoftRater environments that you have configured on the Settings→Environments Tab will be listed here. For Custom Authentication, only logged in users will see secure environments.
Get Listing!	**Get Listing!:** After you have selected the environment where you want to view the backup listing click Get Listing to update the list of backups.
Create	**Create:** Creates a backup from the selected environment.
Delete	**Delete:** Removes the selected backup from the listing.

Creating deleting and loading a backup will write an audit log. Audit logs can be viewed on the Logs→Audit screen.

FIELDS

The Backups subtab displays the backups that have been created for the selected environment. There are five fields in the Backups Listing area.

Backups Listing

Checkbox: Used to select a single or multiple backups for viewing details, downloading or deletion.

Description: Name of the backup, and the environment. If an email address was entered for notification, that email will be listed as the created by.

ID: The ID number assigned to the backup. The ID number will also be file name of the backup file on disk.

Create Date: The time stamp of when the backup was created.

Size: The size of the backup.

Right Click Options

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

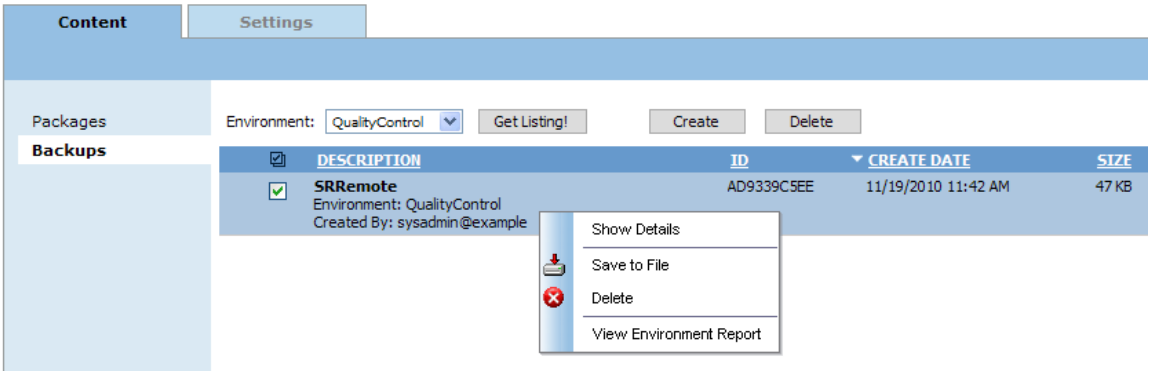


Figure 73 Right Click Menu for the Backups Subtab

Backups have four choices:

- **Show Details:** Displays the contents of the backup on the lower portion of the screen.
- **Save to File:** Downloads remote packages to the local environment. For remote environments, select the packages you want to bring in to your local environments and click Download.
- **Delete:** Removes the selected backup from the listing.
- **View Environment Report:** Displays the environment report for the backup including details, summary and a listing of SRPs.

Processing Options

Saving to File and Deleting will have processing options:

Sync: This will create or delete the backup while you wait. This option is only available if you are working with one backup.

Async: This will create or delete the backup in the background and, optionally, notify you at the email address you enter when loading is complete. This is the only option available when working with multiple backups.

Delete requests will be processed immediately and will not send notifications when complete.

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

Creating a Backup

Backups can be done against an environment that contains packages or does not contain packages. To verify package content, look at the environment report issued for the backup. An invalid database connection will not allow for a backup to be created. If you experience trouble creating a backup, please look in Logs→Error to see if an error has been recorded.

Backup names are for quick identification on the Backups subtab and will be used as the file name when backups are saved to file. Alpha numeric characters, periods, spaces and underscores are allowed. Special characters are not allowed. Backup names can be duplicated. Take care in when using a duplicate name. Backup names cannot be changed on the Backups subtab. Backup names can be changed when saved to file.

When a backup is created, a file will be created in the package location where SRPs are located on disk. Once a backup is saved to disk, it becomes a SoftRater Desktop .SRB file. Each environment will have a folder where the backups for that environment will be placed. Each backup file on disk will be identified by the ID number of the backup. Backup IDs will not be duplicated.

Creating a Backup

1. .
2. Select the **Backups** subtab.
3. Select the **environment** where you want to create a backup and click **GETLISTING!** The screen will refresh. Any backups will be listed. If not backups are found, a message will be displayed.
4. Click **CREATE**. The create backup screen will be displayed.

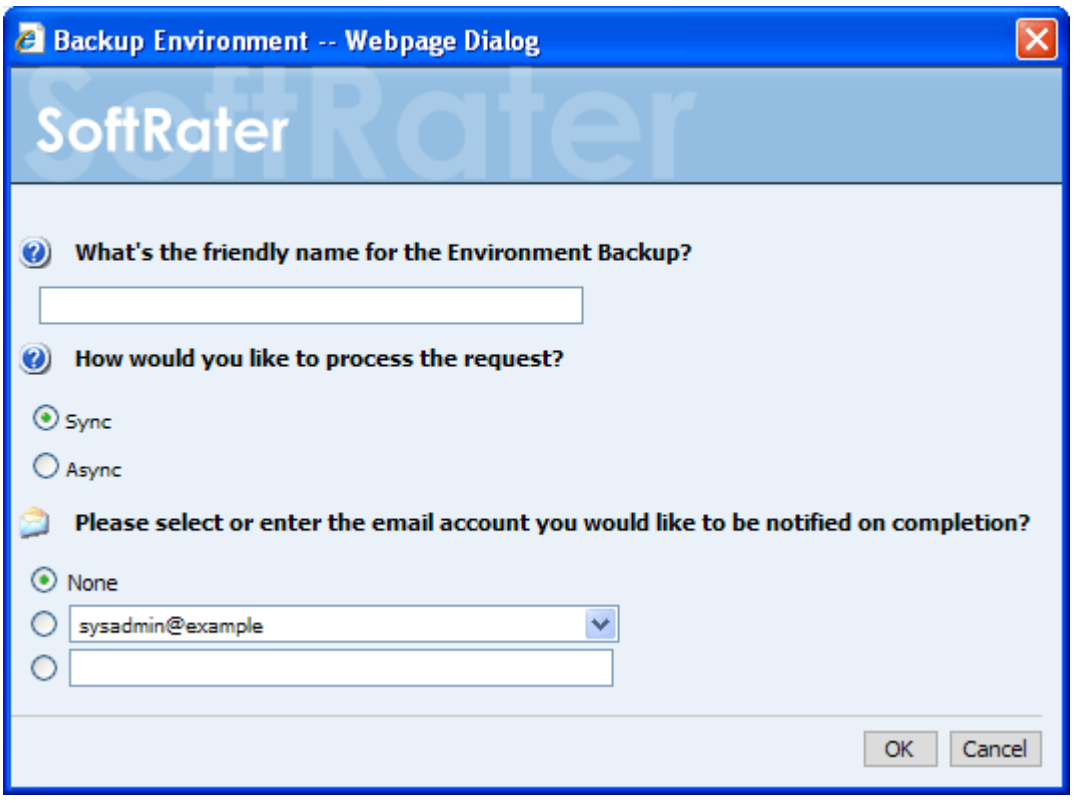


Figure 74 Creating a Backup

5. Enter in a **Friendly name**. This is for identification purposes.

6. Select how you would like to process the request.

   - If you chose the Sync option, the backup will be performed immediately and the backup listing should refresh with the backup.
   - If you chose the Async option, the backup will be performed in batch and if requested, you should receive a message that the request was successful.

   When the process finishes, if you elected to receive an email, you should receive an email with the results. If you elected not to receive an email, nothing will be sent to you. Refresh the listing and the backup will be listed.

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

   To verify that the backup request has or has not been processed, enter the Services page. Under the Insbridge Message Service→Message Process, select SoftRater – Package. Click View Messages. Any outstanding requests will be listed.

NOTE: *Please make sure that the Insbridge Message Service is running. If the message service is not running, a message will be displayed at the top of the screen.*

7. Select or enter the email address to be notified hen the request is processed. If you elect to enter an email address, this will be the Created By name.

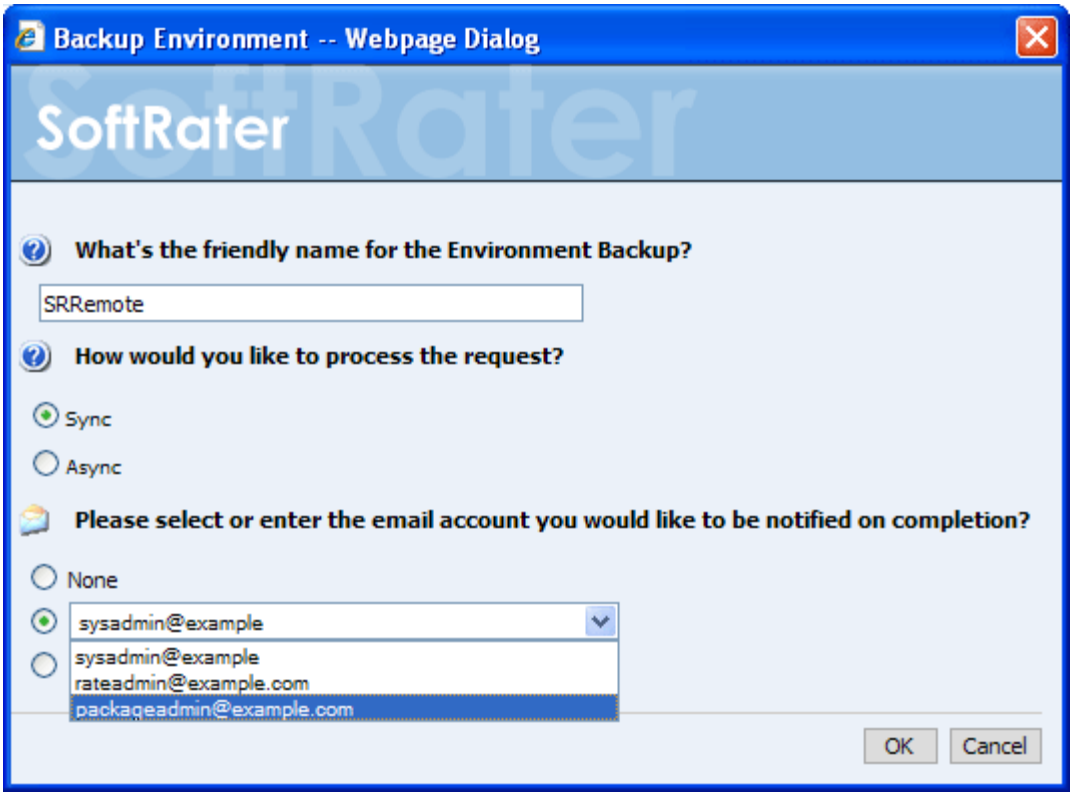


Figure 75 Selecting an Admin when Creating a Backup

8. Click OK. The request will process.

The process request will come up as successful or not.

Save to File

The Save to File option is a right click menu choice that will create a backup zip file on your local hard drive or network. The zip file will be named using the friendly name. The file name cannot be changed at the time of creation but the zip file can be edited at any time.

Backup zip files can be used in a SoftRater Native instance, disaster recovery processes, SoftRater environment migration, or customer support inquiries.

Creating a Backup Zip File

An Insbridge Environment Backup zip file holds the current SRP information for the selected environment. For Oracle XE environments, a database dump file is also included.

1. On **SoftRater Explorer** select the appropriate subscriber.
2. Select the **Backups** subtab.
3. Select the **environment** where you want to create a backup and click **GETLISTING!** The screen will refresh. Any backups will be listed. If not backups are found, a message will be displayed.
4. Select the **backup** you want to save and right click.

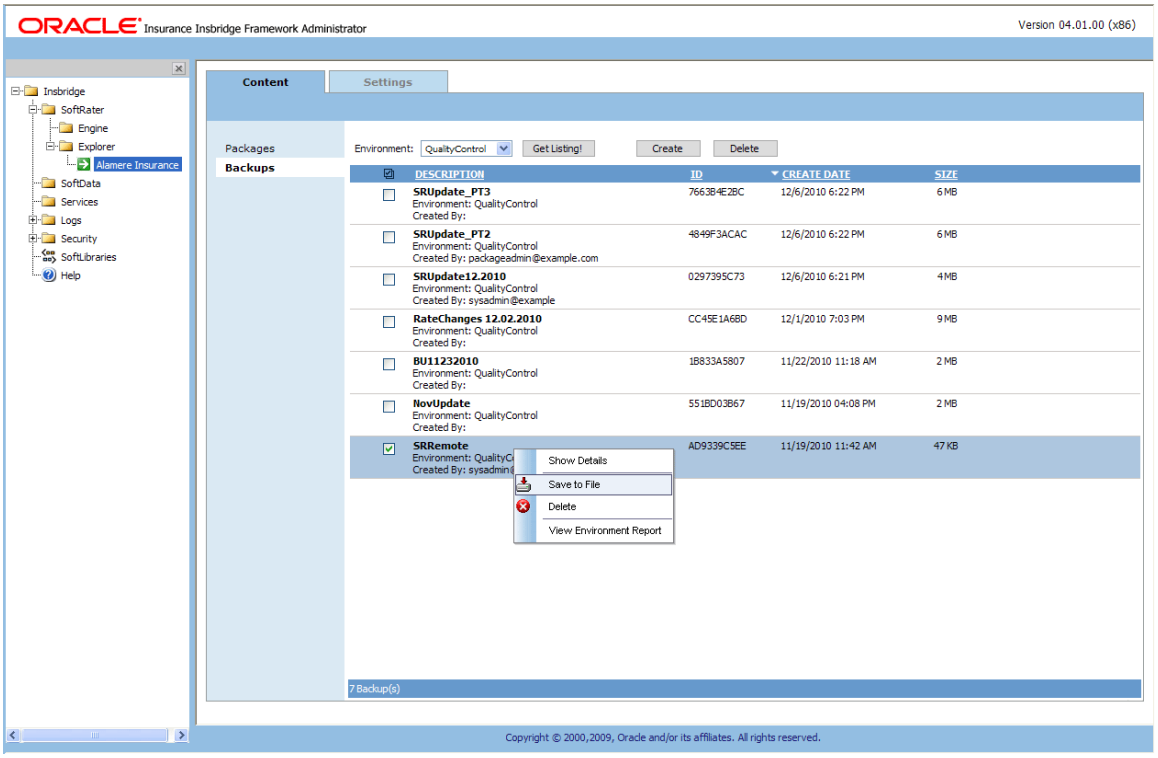


Figure 76 Save To File Select

5. Select **Save to File** from the menu. The File Download dialogue will be displayed.

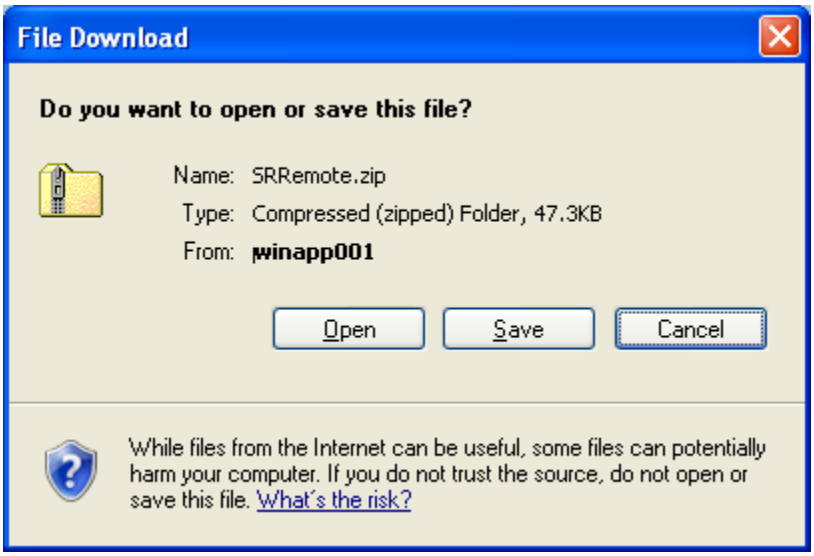


Figure 77 Creating a Backup Zip

6. Elect to **SAVE**. The Save As dialogue box will be displayed.

   Open – will open the zip file in a separate window.
   Cancel – will cancel the process, the dialogue will close and no file will be created or saved.

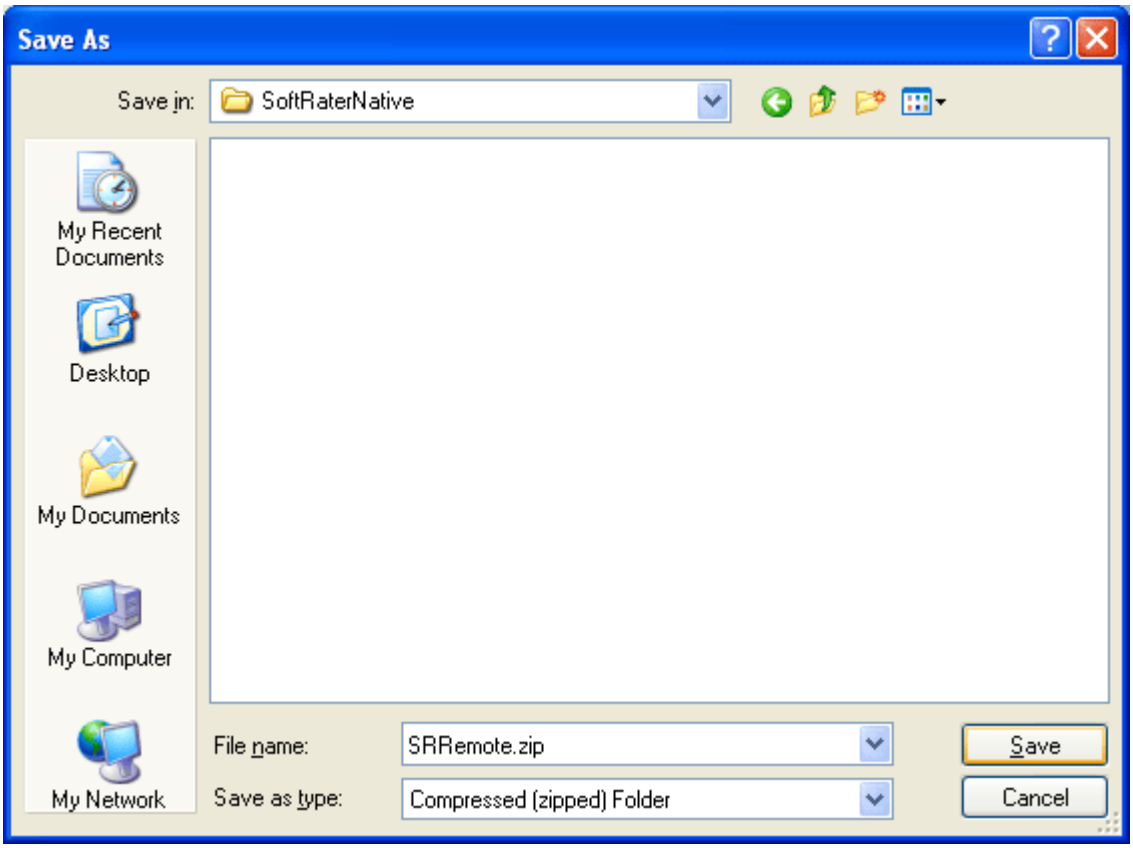


Figure 78 Saving a Backup Zip File

7. Select the location where you want to save the file. The name will default to the friendly name entered. You can change this name if needed.

8. Click **SAVE**. This will save the file to your local hard drive or network.

Backup Zip File Contents

A database backup will contain:

- An Environment Report
- Header XML information with what is contained in the backup
- The SRPs that are to be loaded or unloaded
- If included, custom XML and XSL mappings
- Database backup – Only for XE environments

NOTE: *SQL, Full Oracle databases, and DB2 databases will not have a database backup included in the backup.*

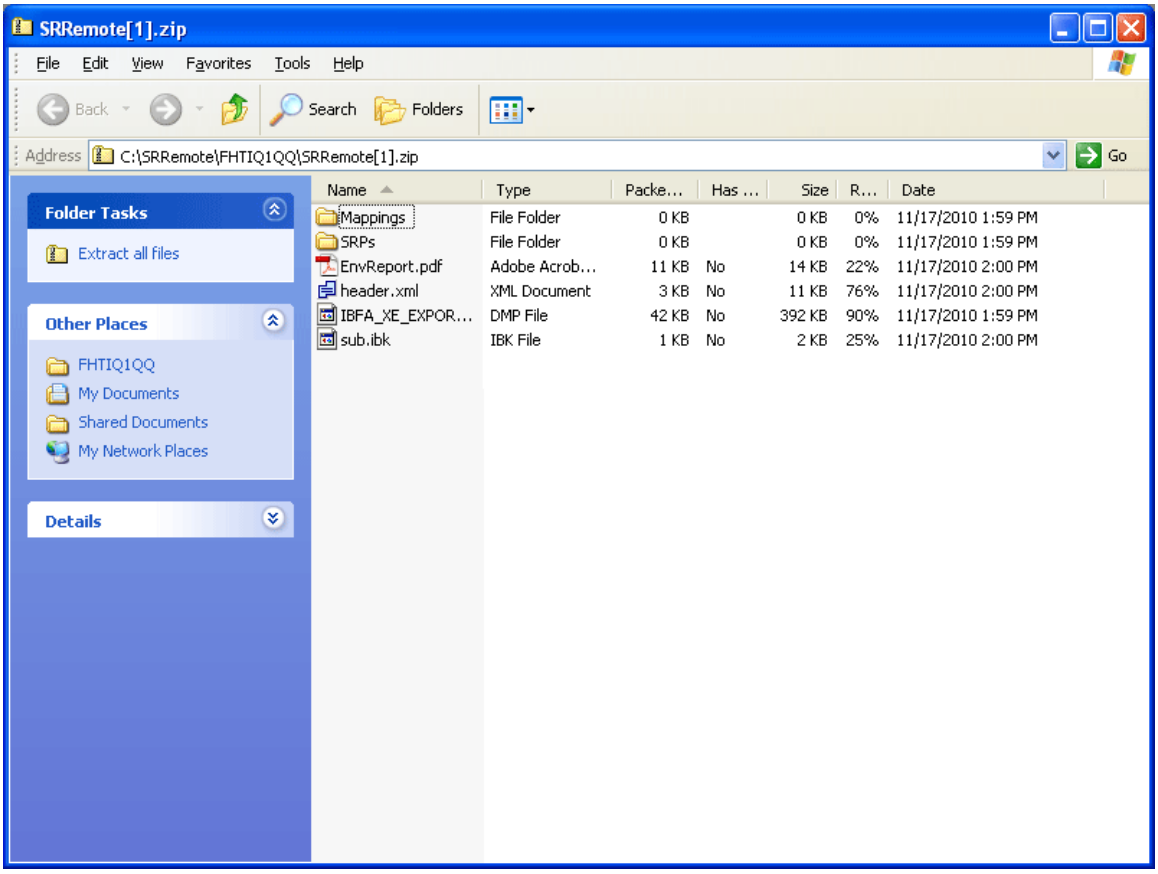


Figure 79 Backup File Contents

Delete Backups

Backups can be deleted at any time. Deleting a backup will remove it from IBFA and from disk.

Make sure this is the action you want to take. Deletes are permanent.

Deleting a Backup

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. Select the **Backups** subtab.
3. Select the **environment** where you want to create a backup and click **GETLISTING!** The screen will refresh. Any backups will be listed. If not backups are found, a message will be displayed.

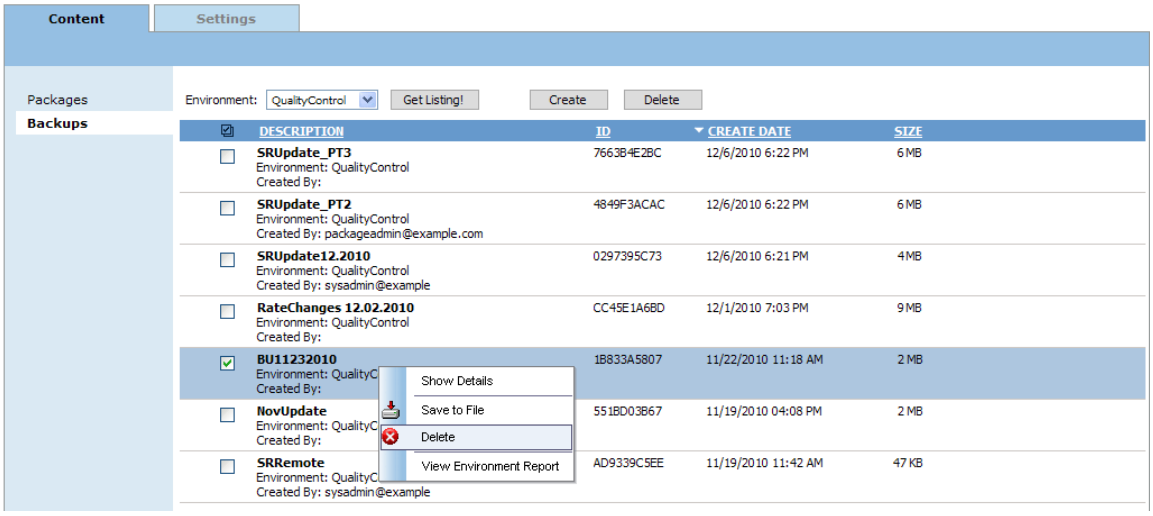


Figure 80 Selecting to Delete a Backup

4. You can click **DELETE** in the top bar menu or right click and select DELETE. The delete backup screen will be displayed.

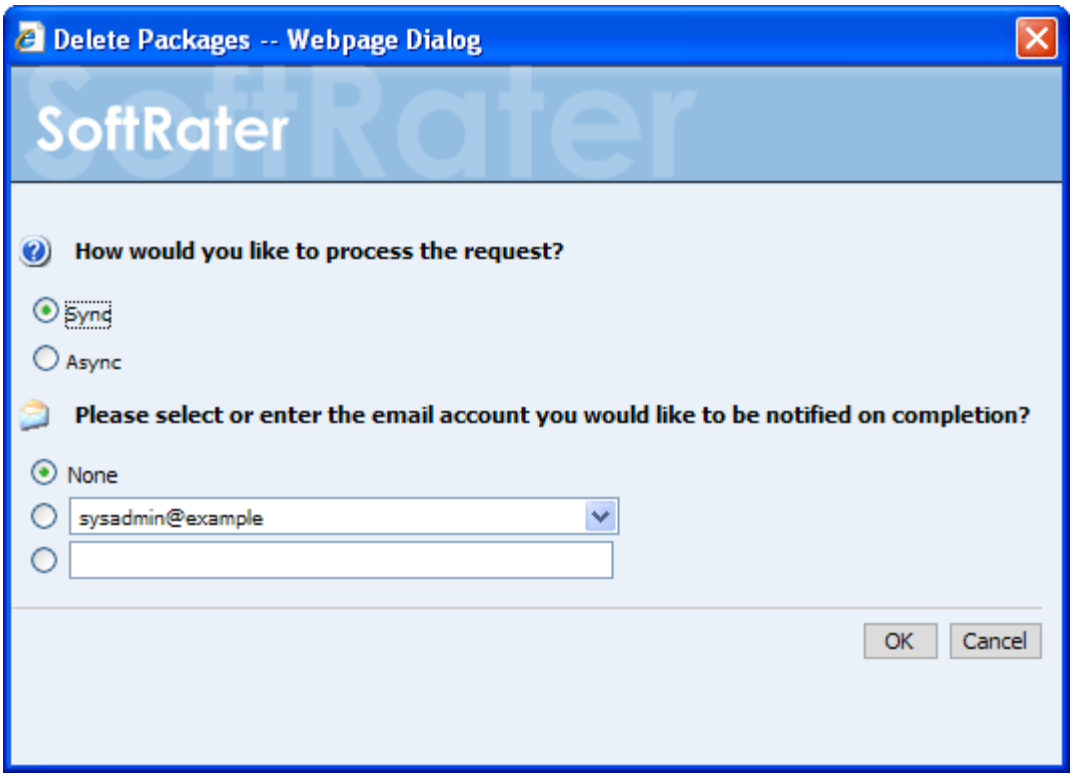


Figure 81 Deleting a Backup

5. Select how you would like to process the request.

   - If you chose the Sync option, the delete will be performed immediately and the backup listing should refresh without the backup.
   - If you chose the Async option, the delete will be performed in batch.

   Deletes are performed immediately. When the delete process finishes an email notification will not be sent. The backup listing will be refreshed and the deleted backups will have been removed from the listing.
   If you receive error messages, check your configuration settings and try again.

   To verify that the backup request has or has not been processed, enter the Services page. Under the Insbridge Message Service→Message Process, select SoftRater – Package. Click View Messages. Any outstanding processes will be listed.

NOTE: *Please make sure that the Insbridge Message Service is running. If the message service is not running, a message will be displayed at the top of the screen.*

6. Select or enter the email address to be notified hen the request is processed. If you elect to enter an email address, this will be the Created By name.

7. Click OK. The request will process.

The process request will come up as successful or not.

Show Details

The Show Details option displays the details of the backup in the lower portion of the screen. Backup details are contained in the Environment Backup Report. To view the Environment Backup Report in a separate screen, please select View Environment Report from the right-click menu.

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. Select the **Backups** subtab.
3. Select the **environment** where you want to view a backup and click **GETLISTING!** The screen will refresh. Any backups will be listed. If not backups are found, a message will be displayed.

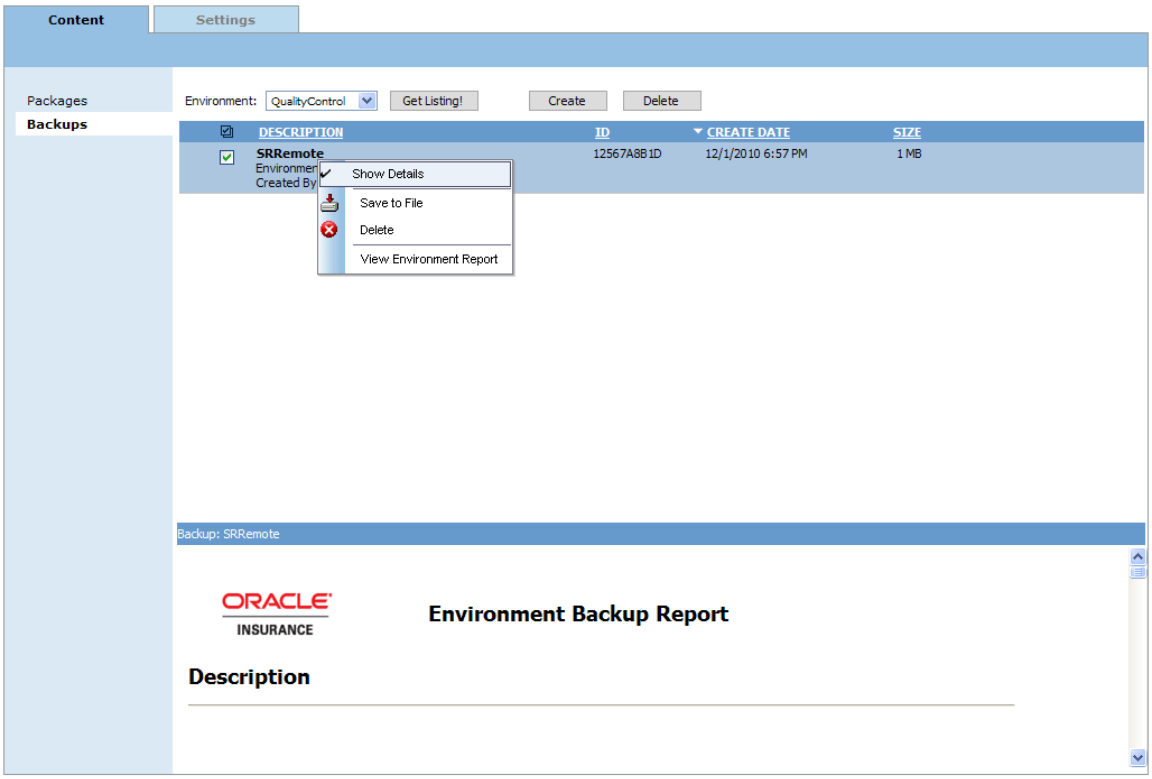


Figure 82 Show Details

4. Select the **backup** you want to save and right click.
5. Select **Show Details**. The screen will refresh and the details of the backup will be displayed in the lower portion of the screen.

View Environment Report

The View Environment Report option displays the details of the backup in a separate screen. To view the Environment Backup Report in the lower portion of the screen, please select Show Details from the right-click menu.

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. Select the **Backups** subtab.
3. Select the **environment** where you want to view a backup and click **GETLISTING!** The screen will refresh. Any backups will be listed. If not backups are found, a message will be displayed.
4. Select the **backup** you want to save and right click.
5. Select View Environment Report. A separate screen will display the report.

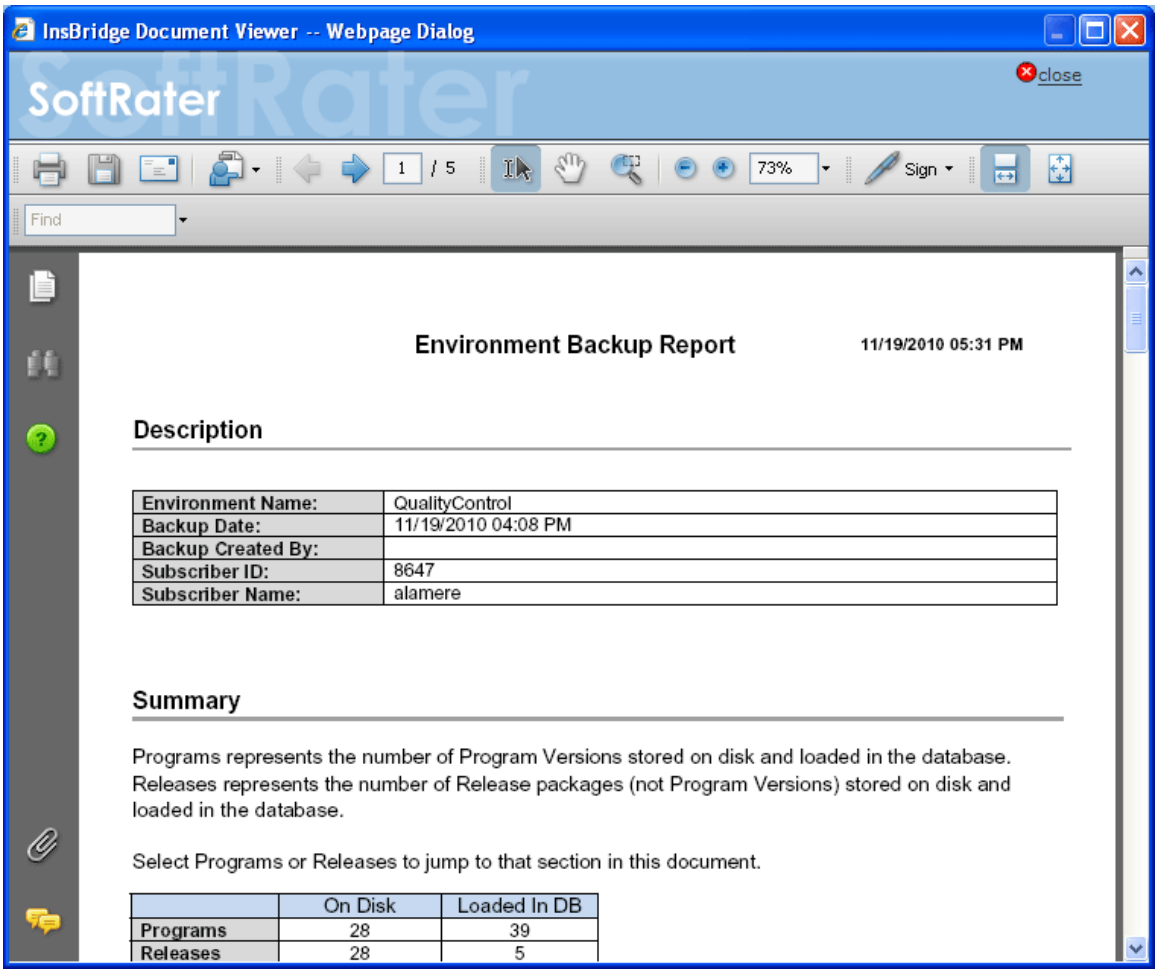


Figure 83 Environment Report

The report will be broken into:

- **Description** – this area contains the basic information about the environment, date created, subscriber ID, subscriber name and if entered, the email notification address.
- **Summary** – this area contains the high level number of program and releases in the backup.
- **Program Listing** – this area contains the details of the programs in the backup including, program names, version package date, size and whether or not it is on disk or loaded in the database.
- **Release Listing** – this area contains the details of the releases in the backup.

Reports will be displayed in the Insbridge Document Viewer. These documents are read-only. Reports can be saved to your local hard drive or network or printed. No editing can be done on the Insbridge Document Viewer.

NOTE: *When you do a "Save As" from the Insbridge Document Viewer, you should rename the file. By default, when you go to save a file in the Insbridge Document Viewer, everything will be named "InsbridgeDocument". It is recommended that you re-name the file.*

SOFTDATA TEST INTERFACE

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

To Test a File Using the SoftData Test Interface

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

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

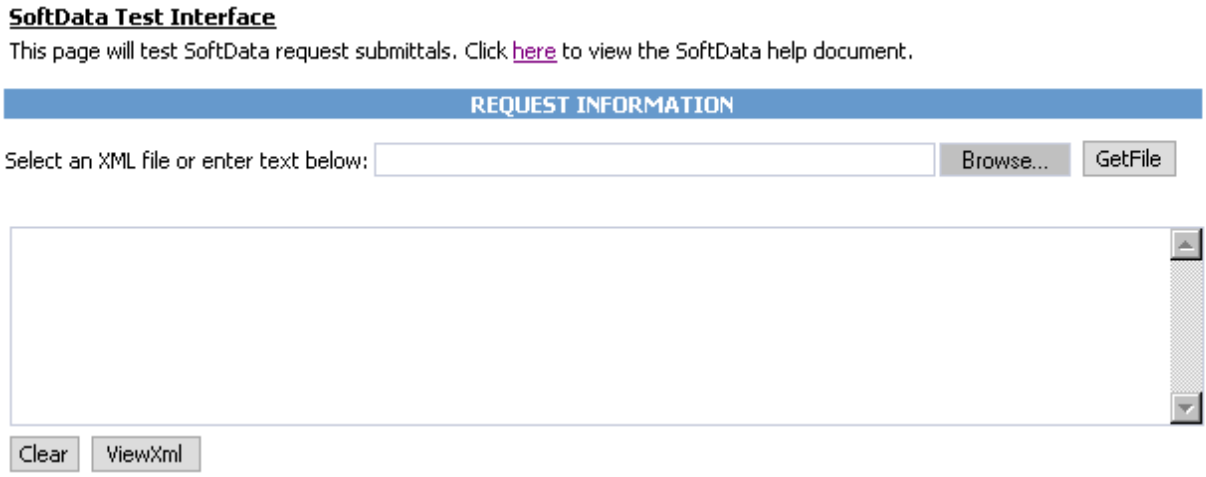


Figure 84 SoftData Test Interface

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

4. When you are ready to submit the file, click **EXECUTE**.

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

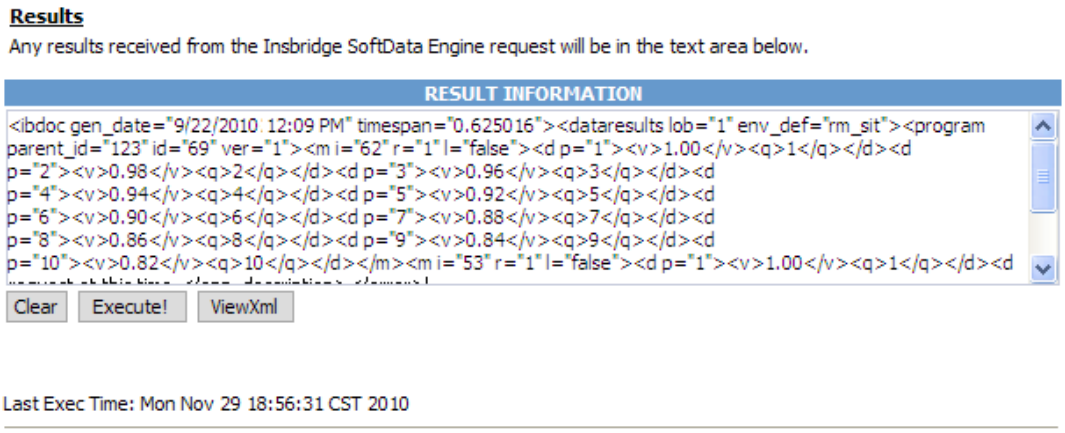


Figure 85 Test Results

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

Copy and Paste

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

- Control + X will cut text.
- Control + C will copy text.
- Control + A will select all text.
- Control + V will paste text.

Chapter 9

SERVICES

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

Navigating to the Services Page

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

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

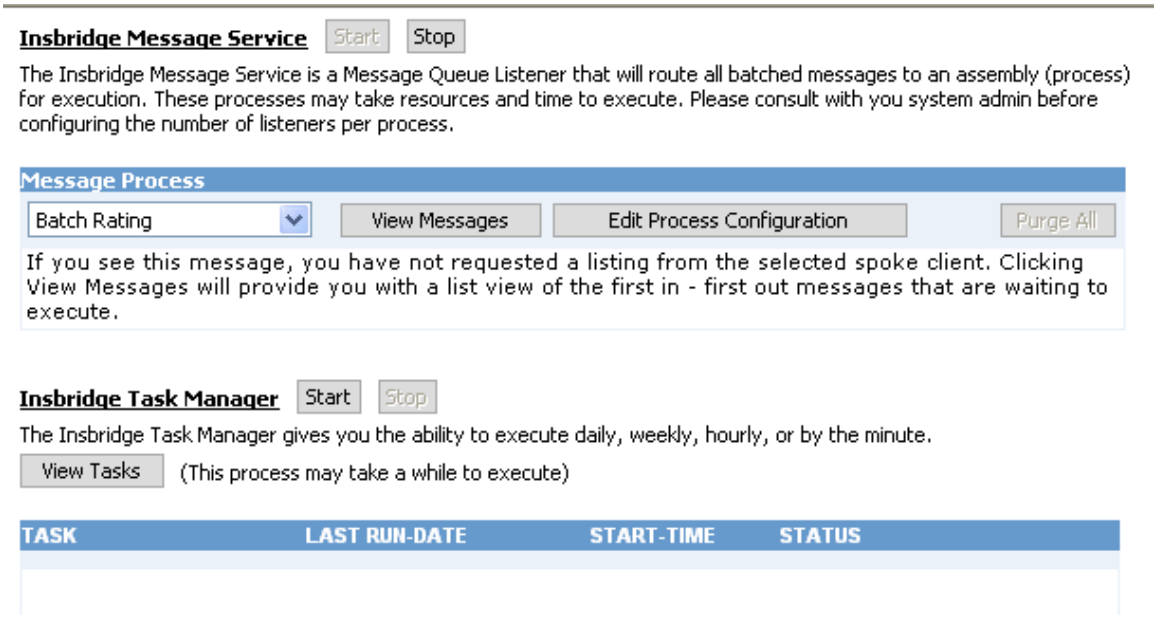


Figure 86 Insbridge Services Screen

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

INSBRIDGE MESSAGE SERVICE

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

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

Starting & Stopping the Message Service

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

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

To Start or Stop the Message Service

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

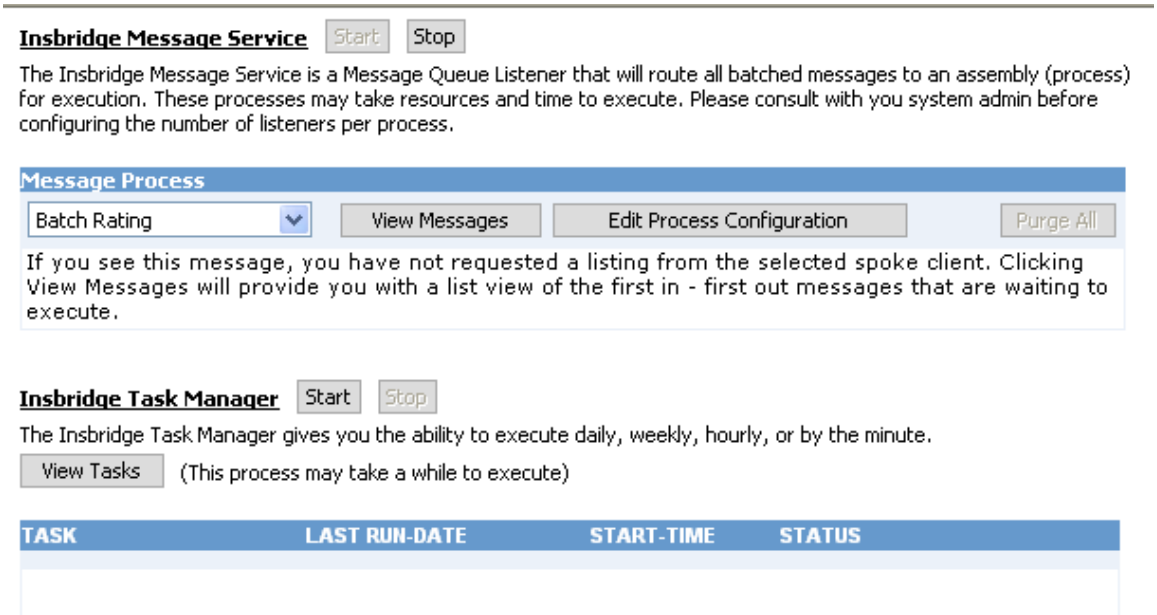


Figure 87 Insbridge Services Screen

2. Next to **Insbridge Message Service**, click Start or Stop.
3. After a few seconds, the buttons will refresh to indicate if the service is started or stopped.
4. If one of the clients is currently performing an operation, you may receive an error message when you attempt to stop the service. Simply click Stop again to stop the service. The client will abort the operation and the service will be stopped.

OBI Publisher

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

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

NOTE: *The location and port for OBI Publisher is http://localhost:9704/xmlpserver/. This information may be needed if you have to make a request to your company's infrastructure and request the security team to open the ports used by Publisher.*

Viewing Messages

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

To View Messages in the Queue

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

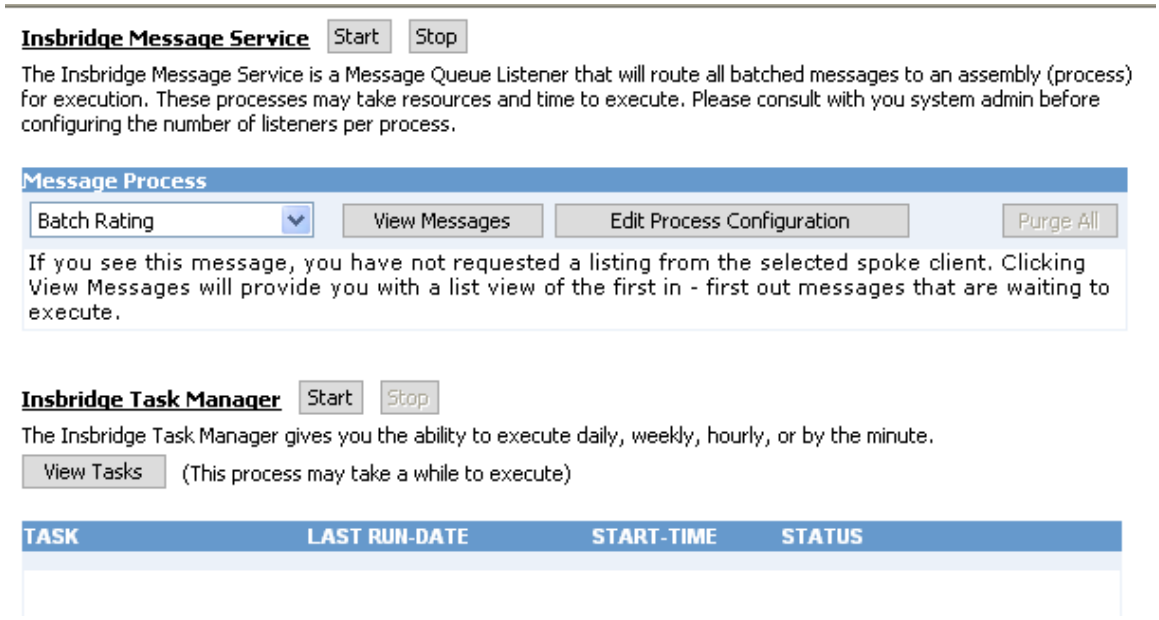


Figure 88 Insbridge Services Screen

2. Select the appropriate client from the drop down.

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

3. Click View Messages.

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

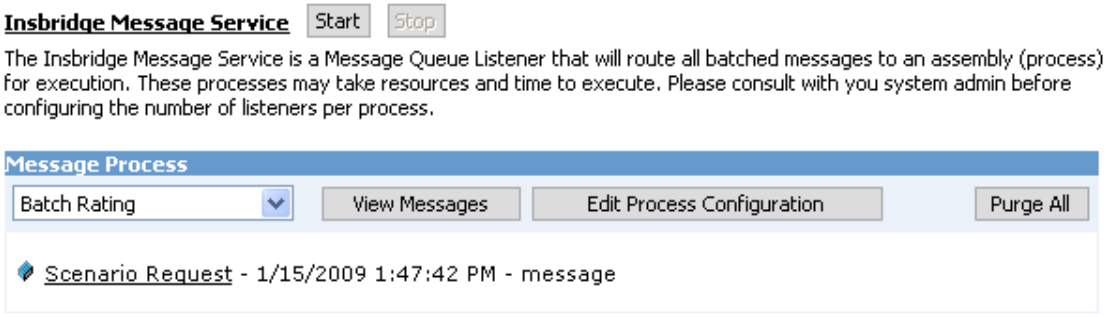


Figure 89 Insbridge Message Service

5. To view details on a specific message, click the underlined portion (in this case, Scenario Request).

6. Information about the message will open in a separate window.

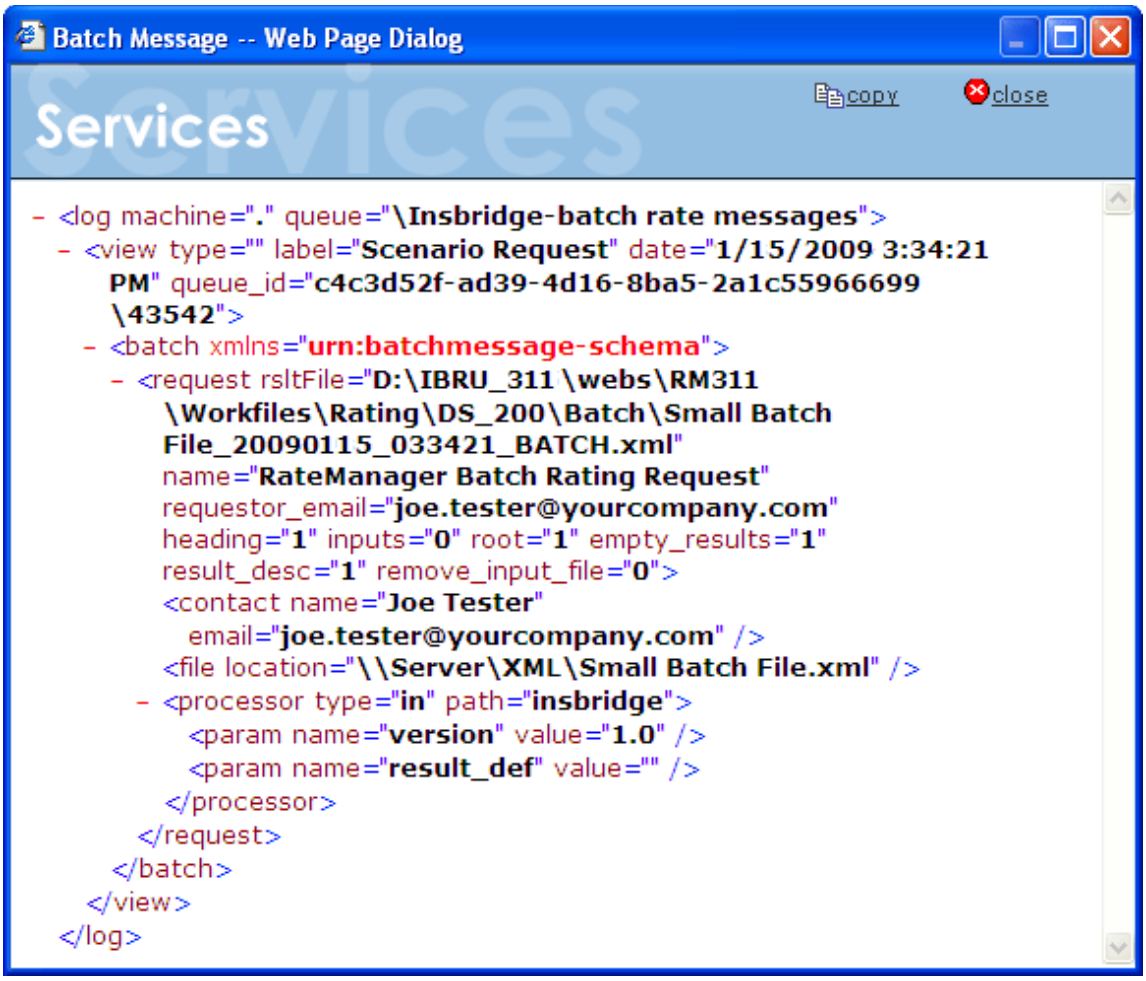


Figure 90 Batch Message Information

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

Deleting Messages

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

To Delete Messages from the Queue

This will delete all messages from the selected queue.

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

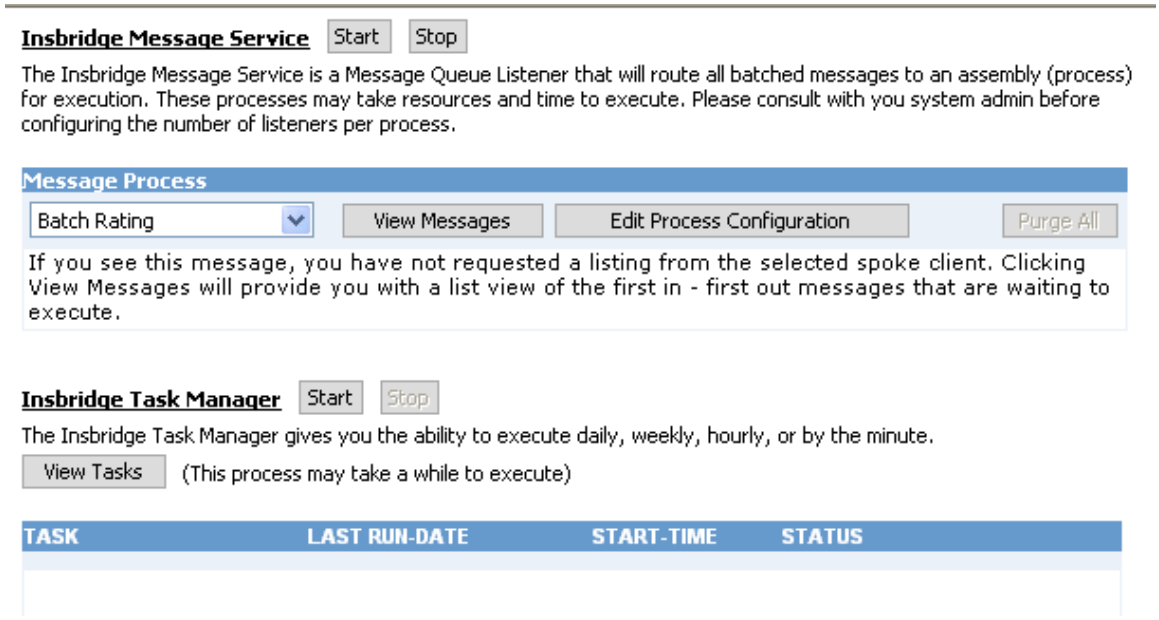


Figure 91 Insbridge Services Screen

2. Select the appropriate client from the drop down.

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

3. Click View Messages.

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

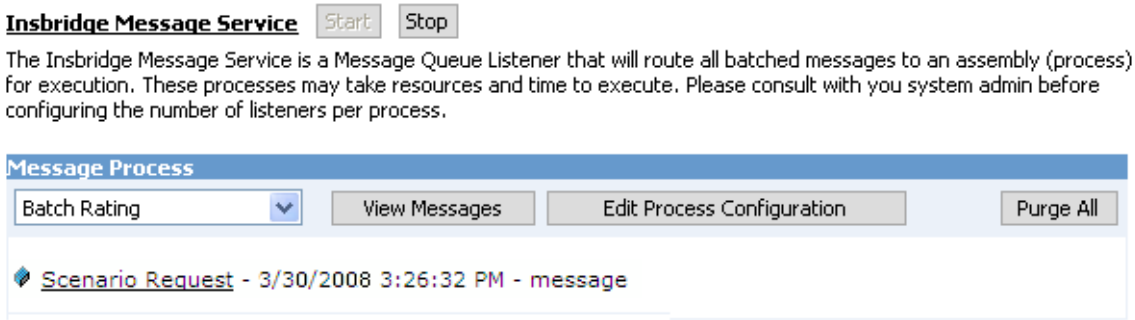


Figure 92 Insbridge Message Service

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

Process Configuration

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

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

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

Editing the Process Configuration for a Client

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

Figure 93 Insbridge Services Screen

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

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

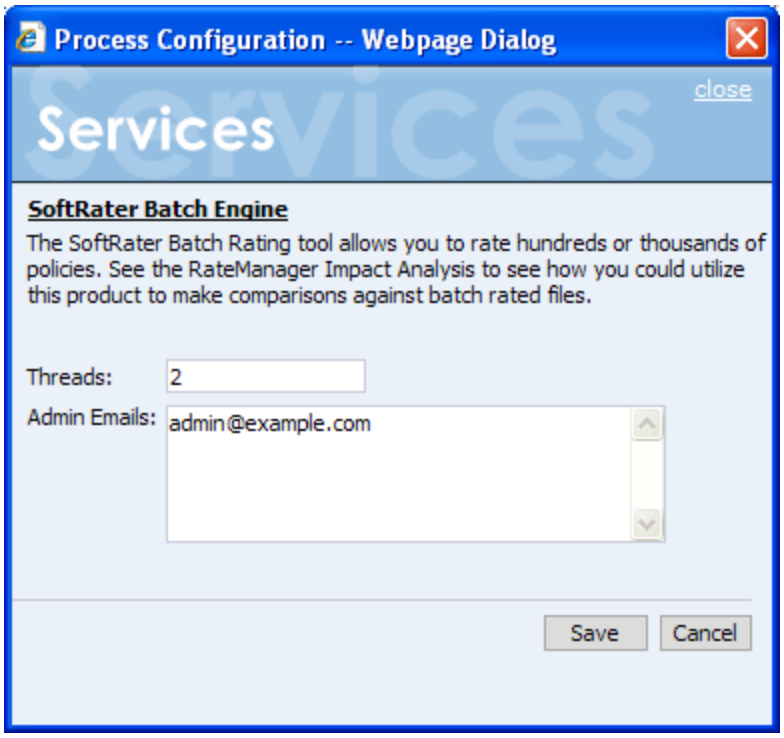


Figure 94 Process Configuration Window

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

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

Introduction to Insbridge Task Manager

The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status. Tasks listed here are system tasks, for example, clearing out temporary files, and generally are not changed or altered once in place. Tasks are entered when IBFA is set up. To edit or delete a task, you must return to the IBFA setup files. Please contact Insbridge Support for more information.

Starting & Stopping Task Manager

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

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

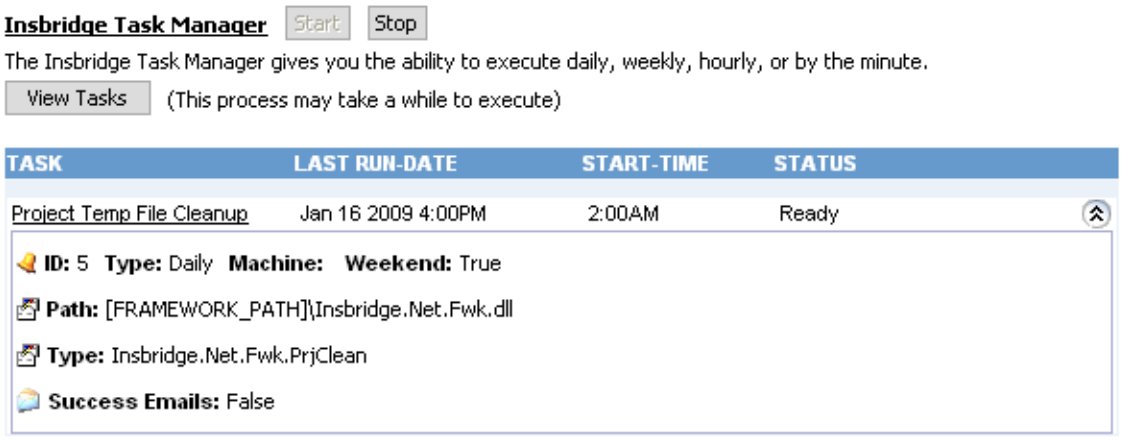


Figure 95 Insbridge Task Manager

Viewing Task Details

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

Chapter 10

LOGS

Error Log

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

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

To Navigate to the Error Log

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

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

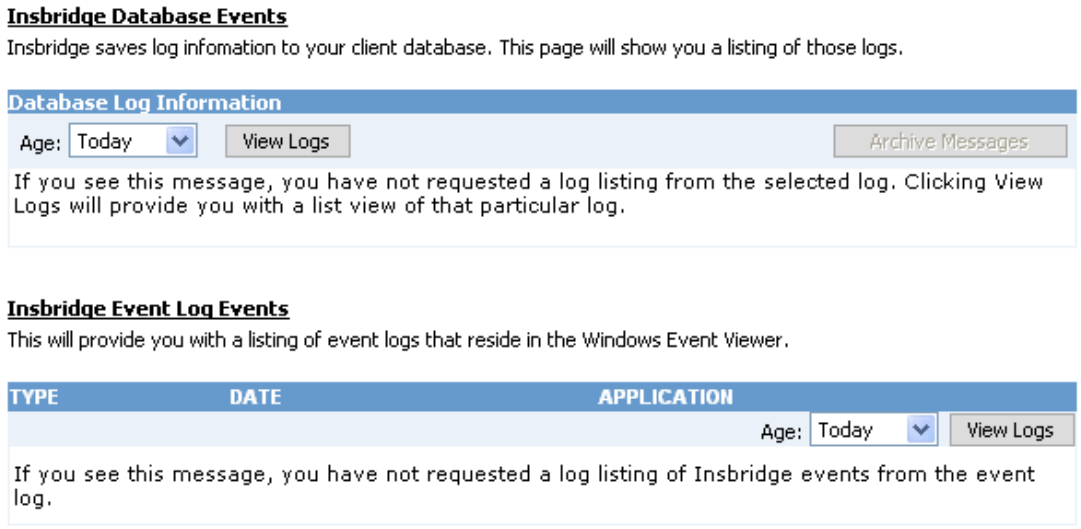


Figure 96 Insbridge Error Log

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

Database Events

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

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

To View the Database Event Log

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

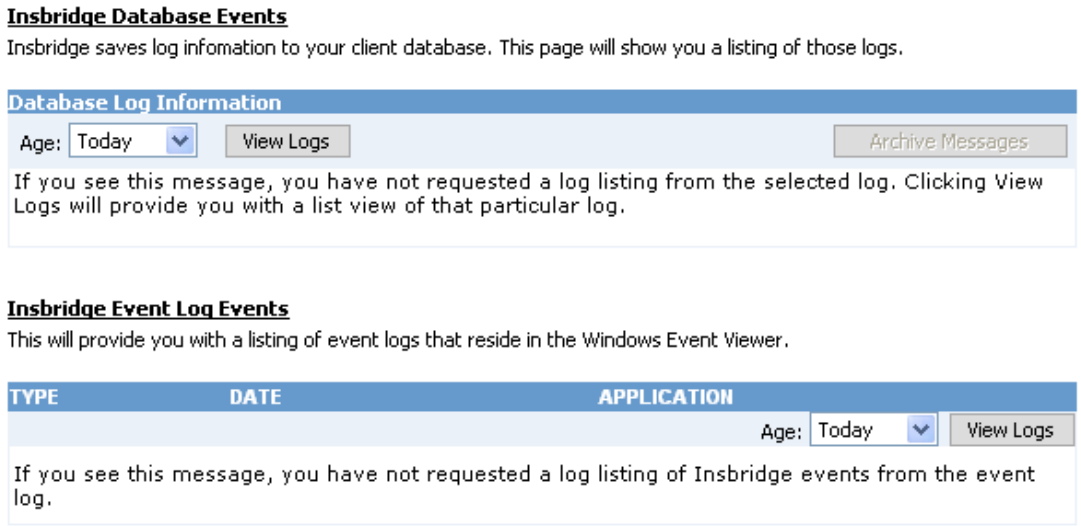


Figure 97 Insbridge Error Log

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

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

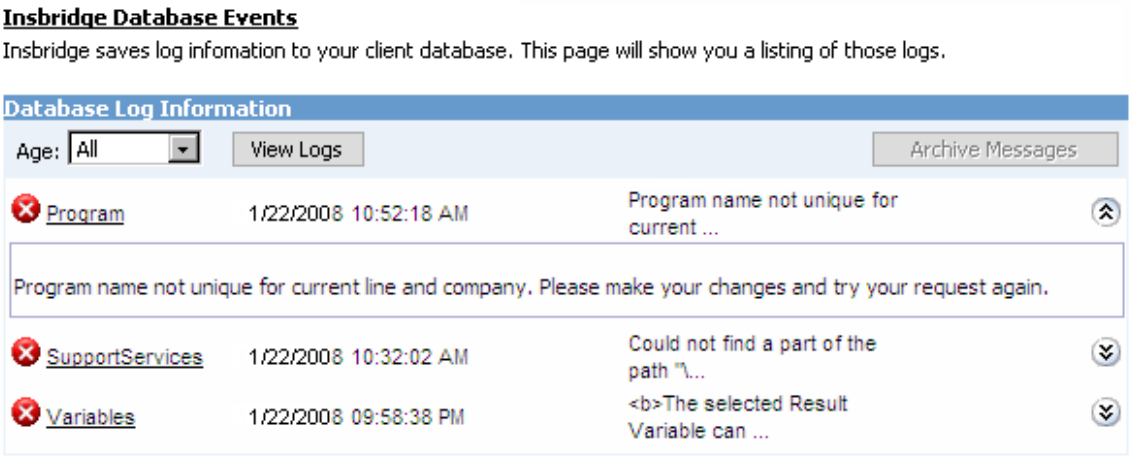


Figure 98 Insbridge Database Events

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

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

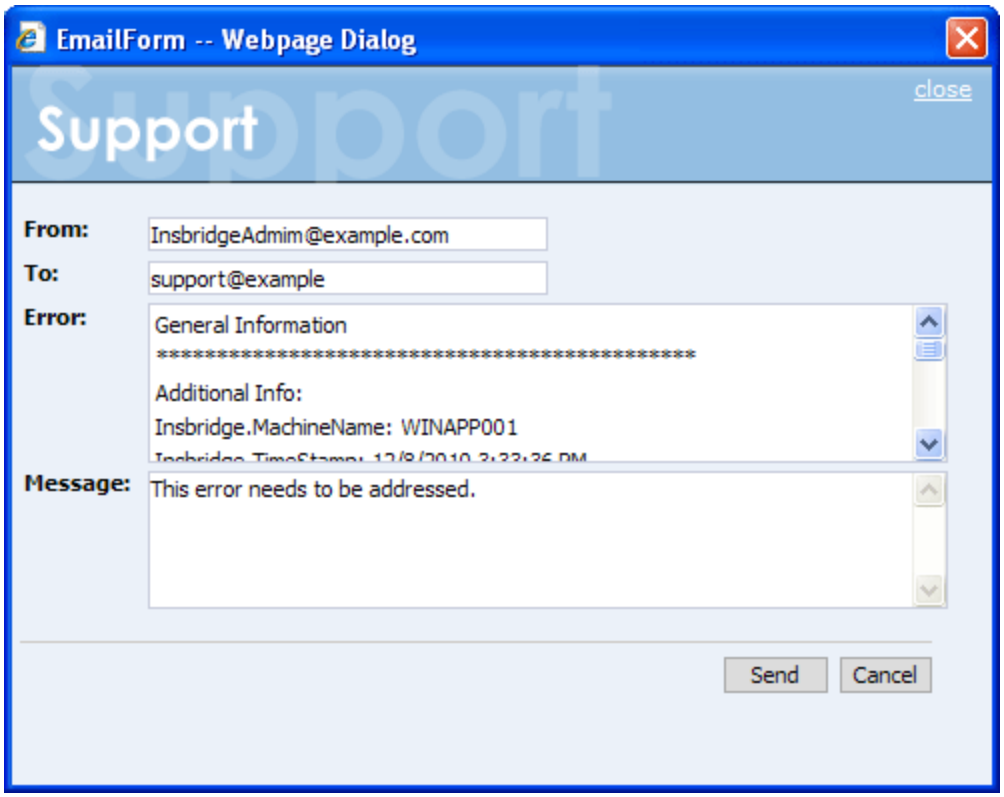


Figure 99 Emailing an Event

6. Enter your email address in the From field and the address you want to send the error to in the To field.

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

Event Log Events

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

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

IBFA will display 80 events. If you require more than that, you need to return to the server's event log.

To View the Event Log

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

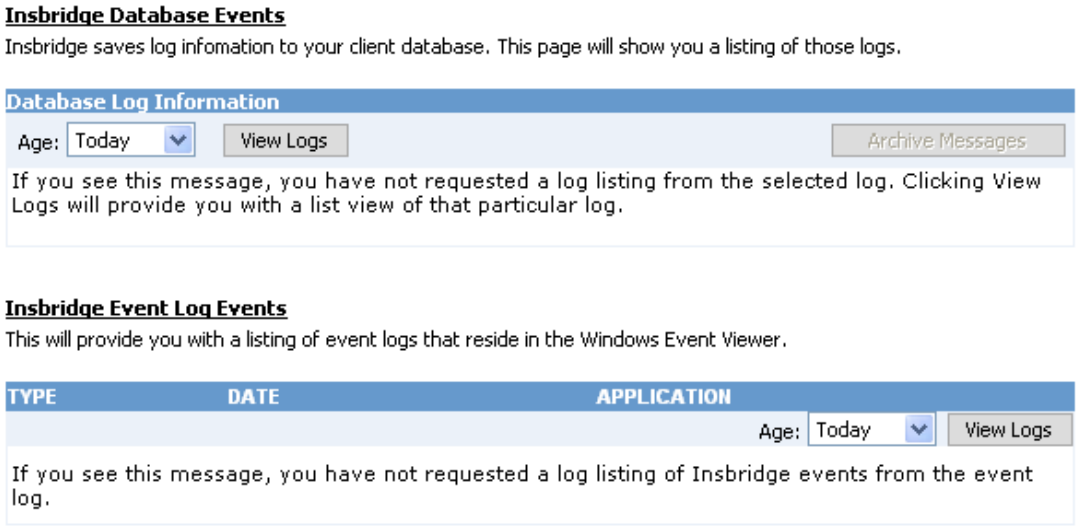


Figure 100 Insbridge Error Log

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

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

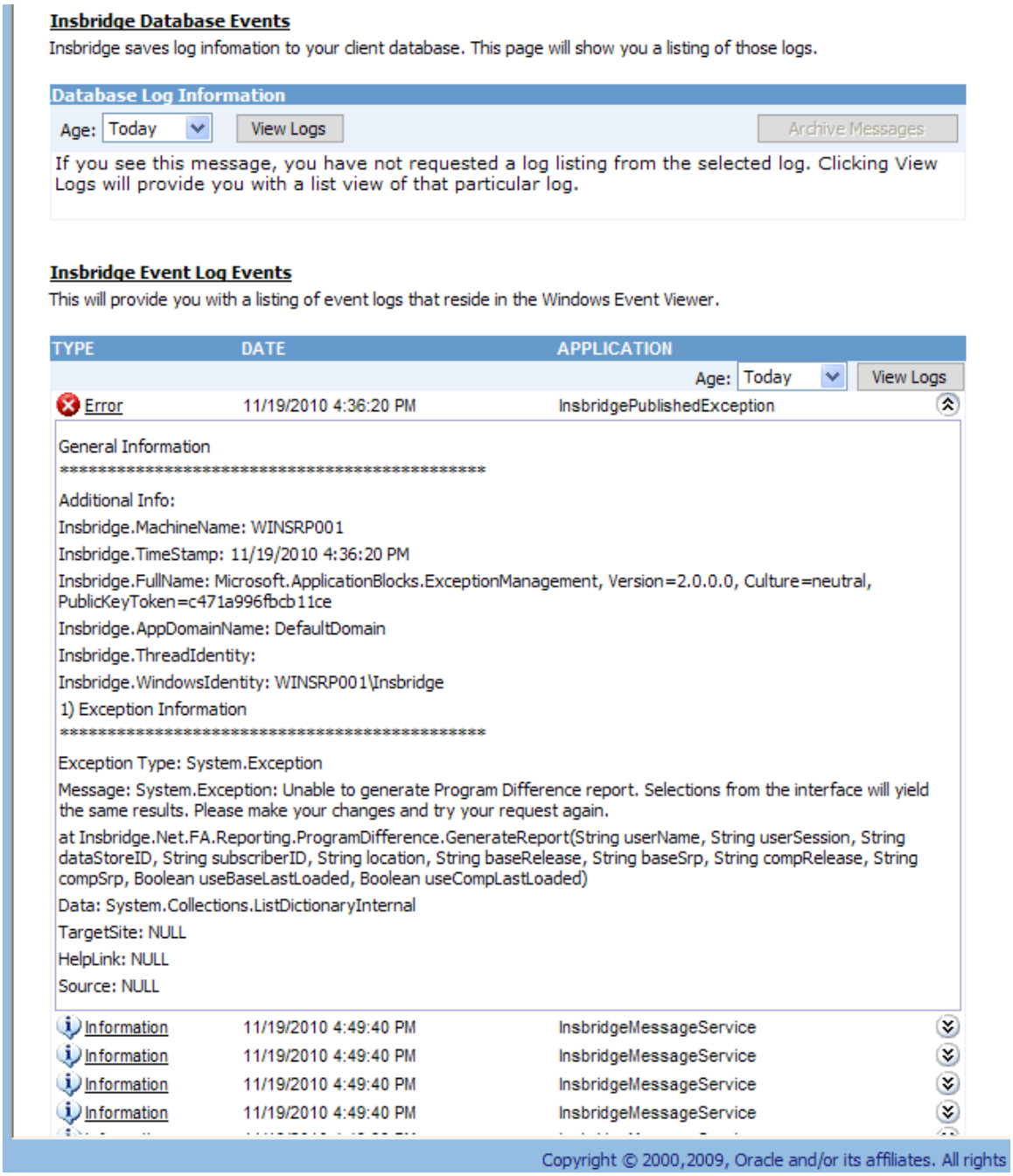


Figure 101 Insbridge Event Log Event

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

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

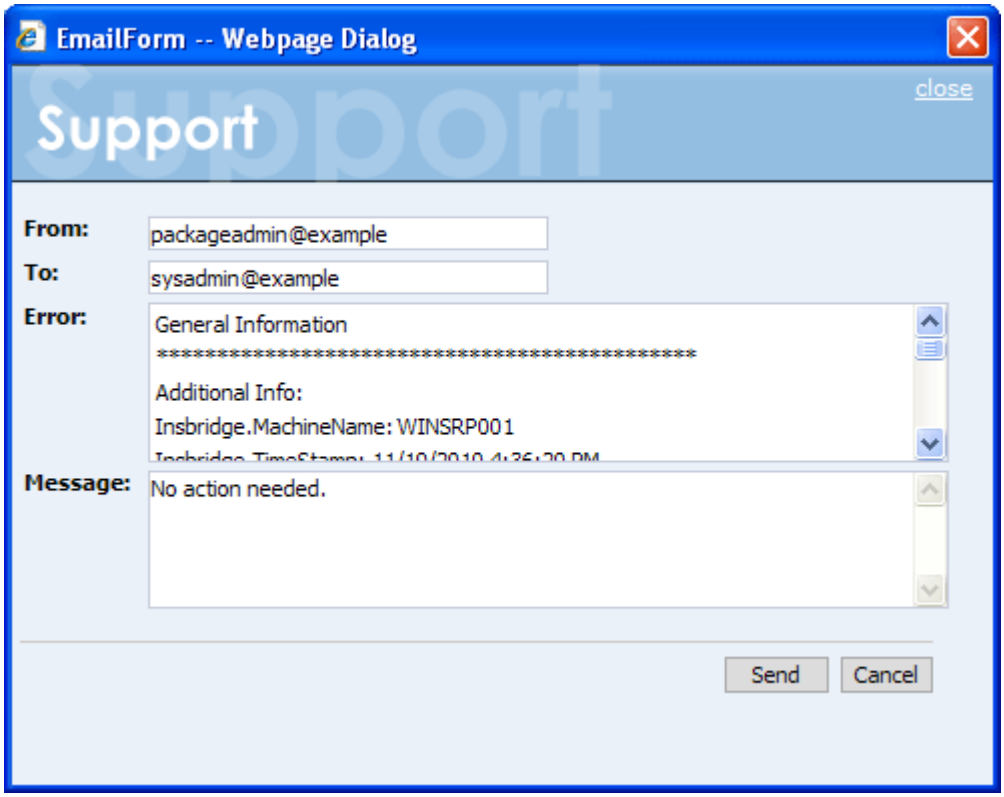


Figure 102 Emailing an Event

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

Introduction to the Audit Log

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

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

Viewing the Audit Log

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

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

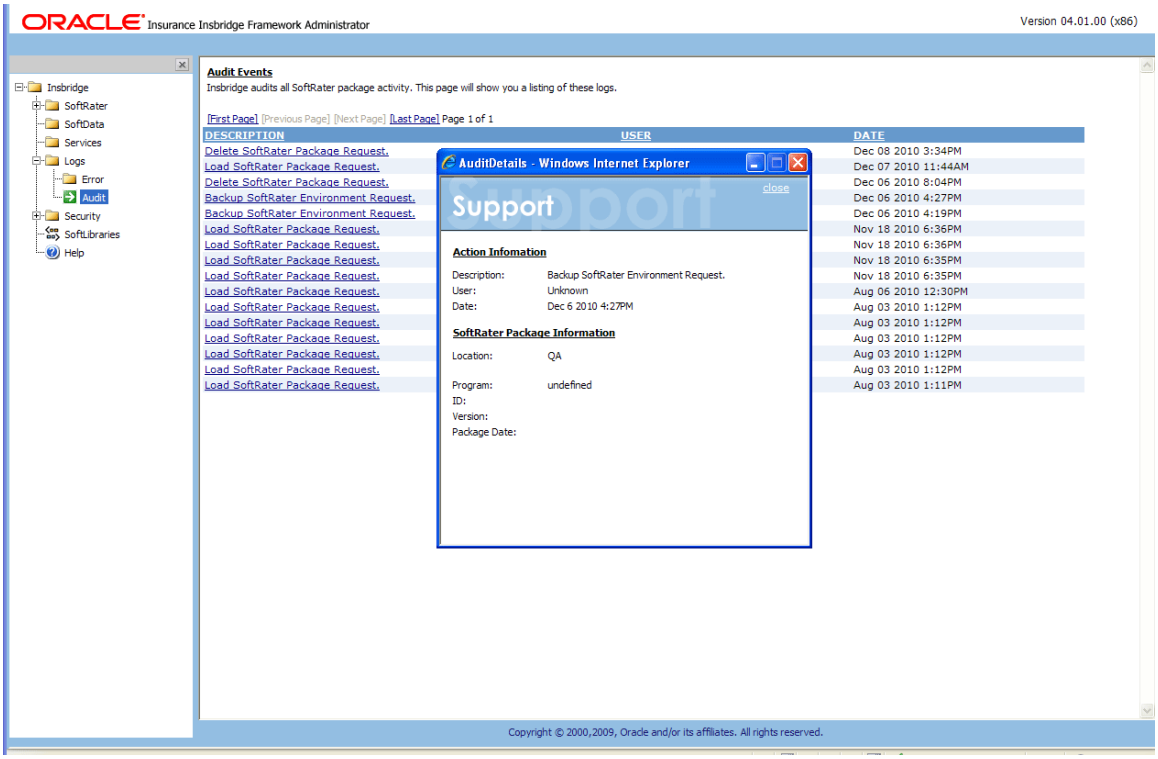


Figure 103 Audit Log

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

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

Chapter 11

SECURITY

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

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

Changing the Type of Authentication Used

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

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

Authentication is reset when updates are made to the IBRU system. If you have enabled Windows or custom authentication, you will need to reset these options after running a system update, i.e. going from release 4.0 to release 4.1.

To Change the Type of Authentication

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

2. This will open the **Security** page. Security is in the upper portion of the screen.

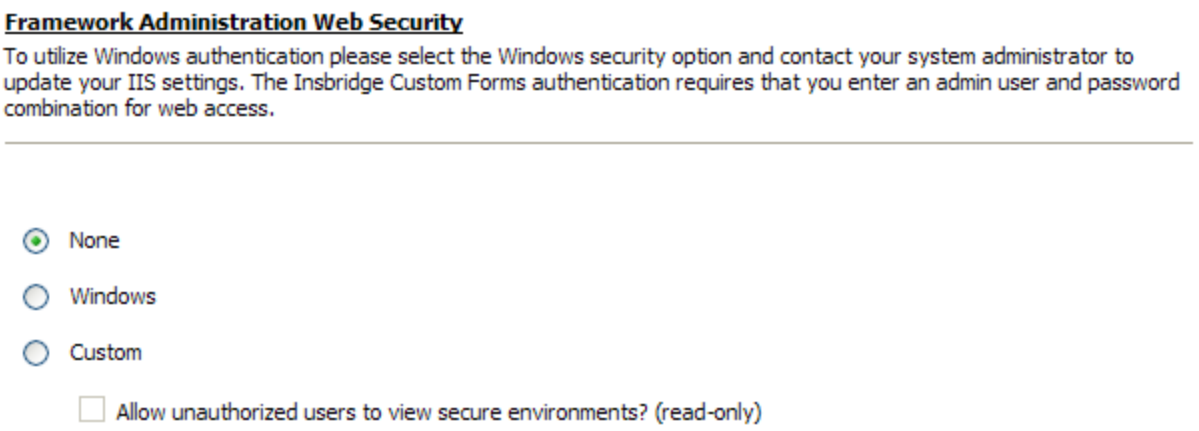


Figure 104 Insbridge Security Page

3. Select the radio button next to the type of authentication you want to use.

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

Windows Authentication

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

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

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

If you select to use Windows authentication:

1. Go to IIS and disable anonymous access.

2. Enter the SoftRater Explorer and change the Intranet Credentials to the windows account that is to be used.

Custom Authentication

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

When custom authentication is used, users will initially only see the Content Tab.

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

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

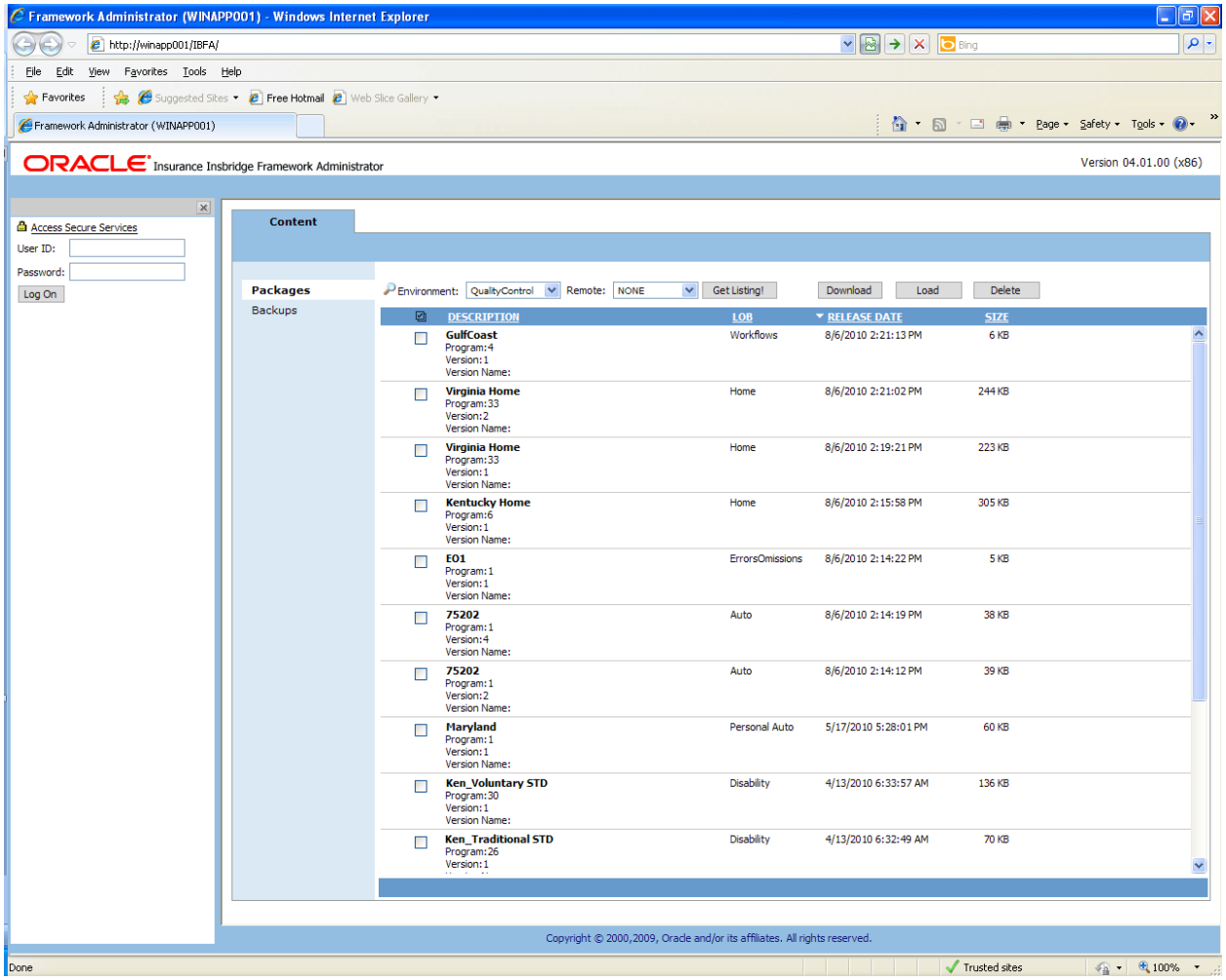


Figure 105 Logging into Framework Administrator

User ID, Default Password, Resetting the Password

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

External API Access

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

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

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

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

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

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

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

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

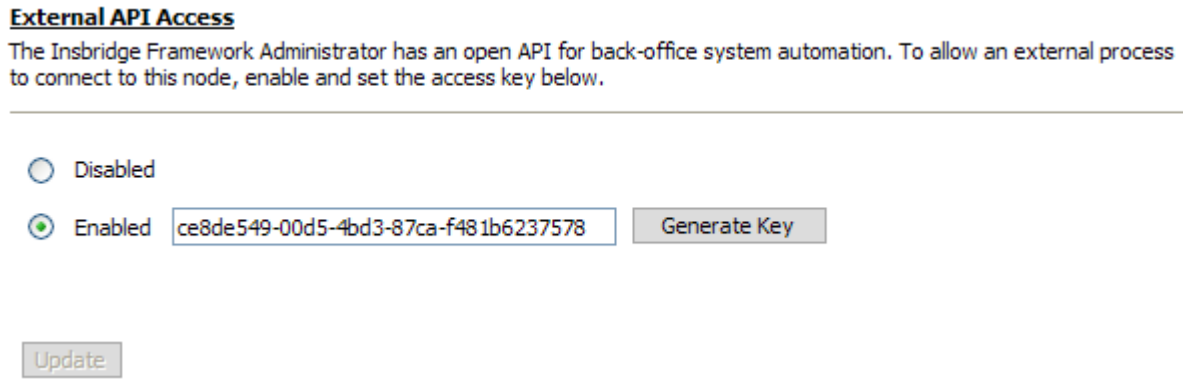


Figure 106 Allowing External API Access

Changing the Password

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

To Change the Password

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

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

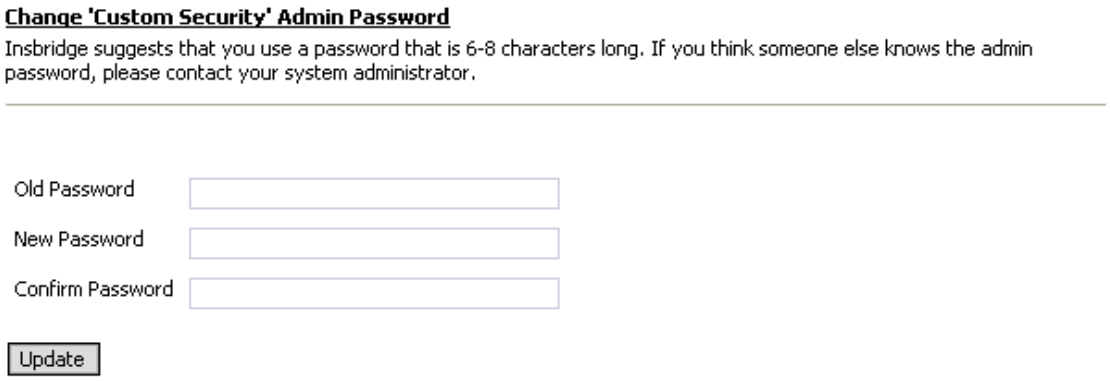


Figure 107 Changing your Password

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

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

Chapter 12

SOFTLIBRARIES

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

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

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

Navigating to SoftLibraries

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

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

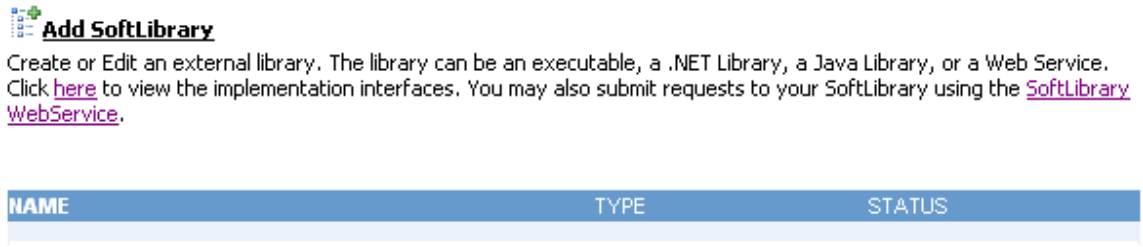


Figure 108 SoftLibrary Main Page

The main SoftLibraries page will display any entered SoftLibraries. Other information includes:

Name: The name of the SoftLibrary.

Type: The type of SoftLibrary, either .NET Web Service, WebSphere or WebLogic.

Status: The status, either active or disabled.

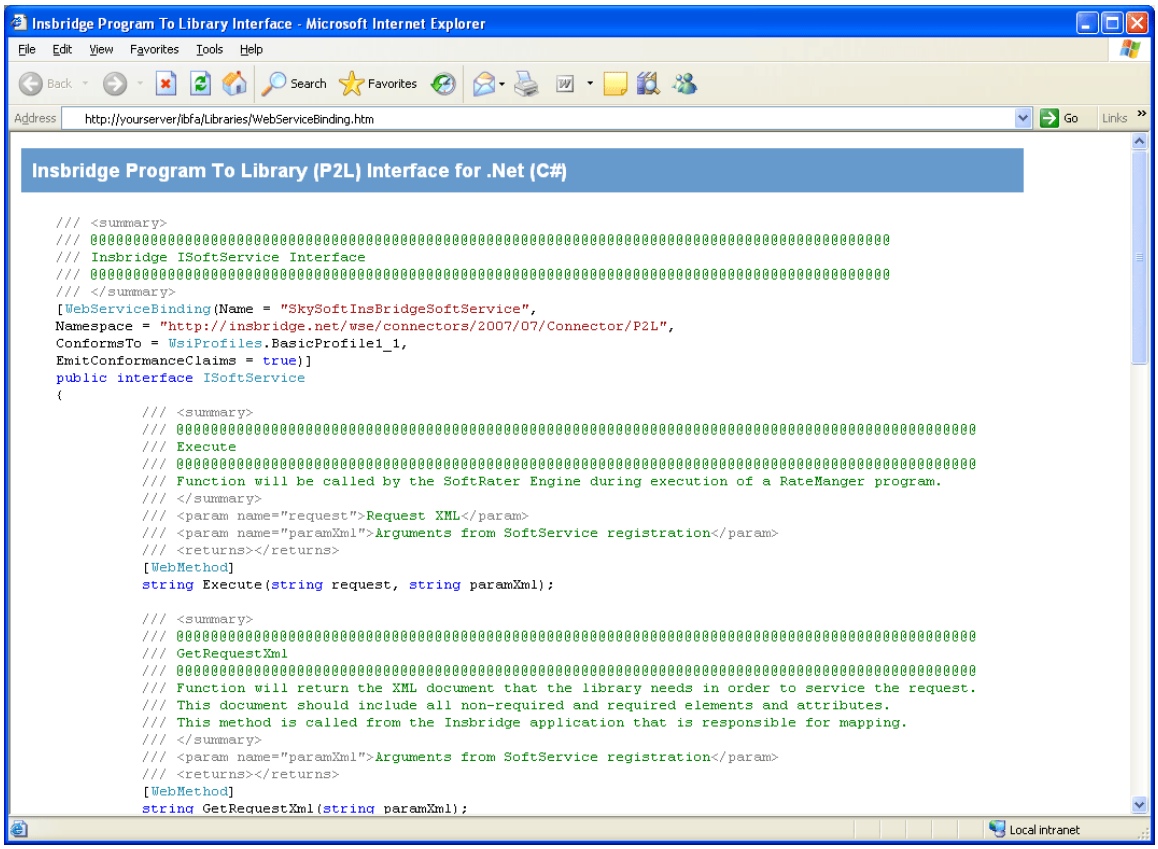
NOTE: *The status determines whether or not a SoftLibrary is displayed in RateManager. If a SoftLibrary is disabled, it will not be displayed. If a SoftLibrary is active, it will be displayed.*

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

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

Click here link: Found on "Click here to view the implementation interfaces." This pulls up a separate window that contains the implementation interfaces required by SoftLibraries. This window can be left open while you work.

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


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

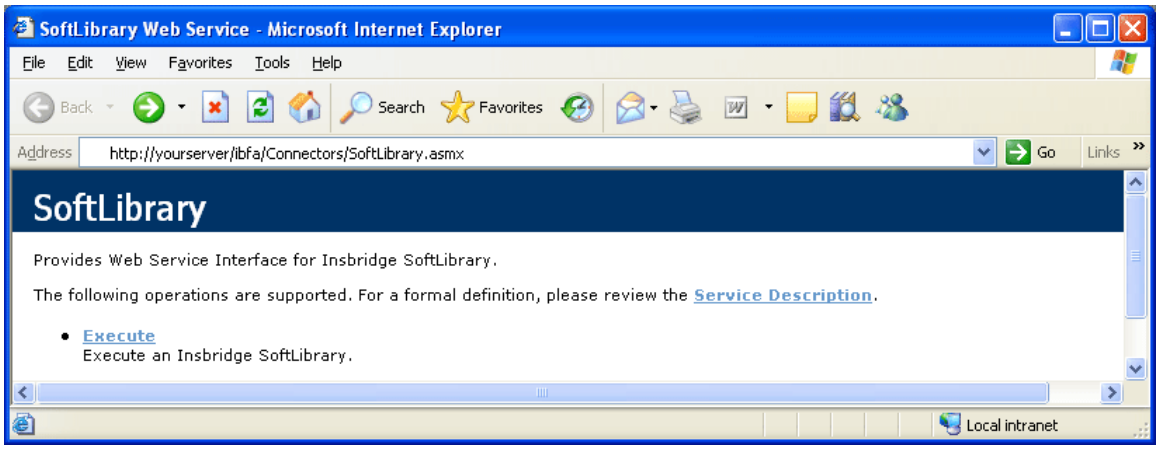


Figure 110 SoftLibrary Web Services

ADDING SOFTLIBRARIES

Adding a SoftLibrary is a multi step process. The assistance of a system administrator may be required to place the library on the server and register with IIS.

- Windows based SoftLibraries can be copied locally.
- Java SoftLibraries are remote only.
- Remote SoftLibraries are indicated by a red arrow ➔ next to the SoftLibrary name.

Adding a Windows library

The first step is to place the created .Net Web Service project (the SoftLibrary you want to call) on the network where IBFA can reach it. You can place in an existing folder or create an Insbridge folder. Next you need to create a virtual directory for the SoftLibrary in IIS. Permissions should be read, run scripts and execute. Please follow the standards and practices set by your company when placing and registering your SoftLibrary.

Before you add the SoftLibrary to IBFA, have the Class Name and Endpoint information ready.

Adding a Java class library

If you want to create a Java class library, the .JAR file must be placed in a specific location and then entered into IBSS. Please see the IBSS user Guide for exact file locations and procedures. After entering in IBSS, the SoftLibrary can be added in IBFA. Please have the Class Name and Endpoint information ready.

Adding to IBFA

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

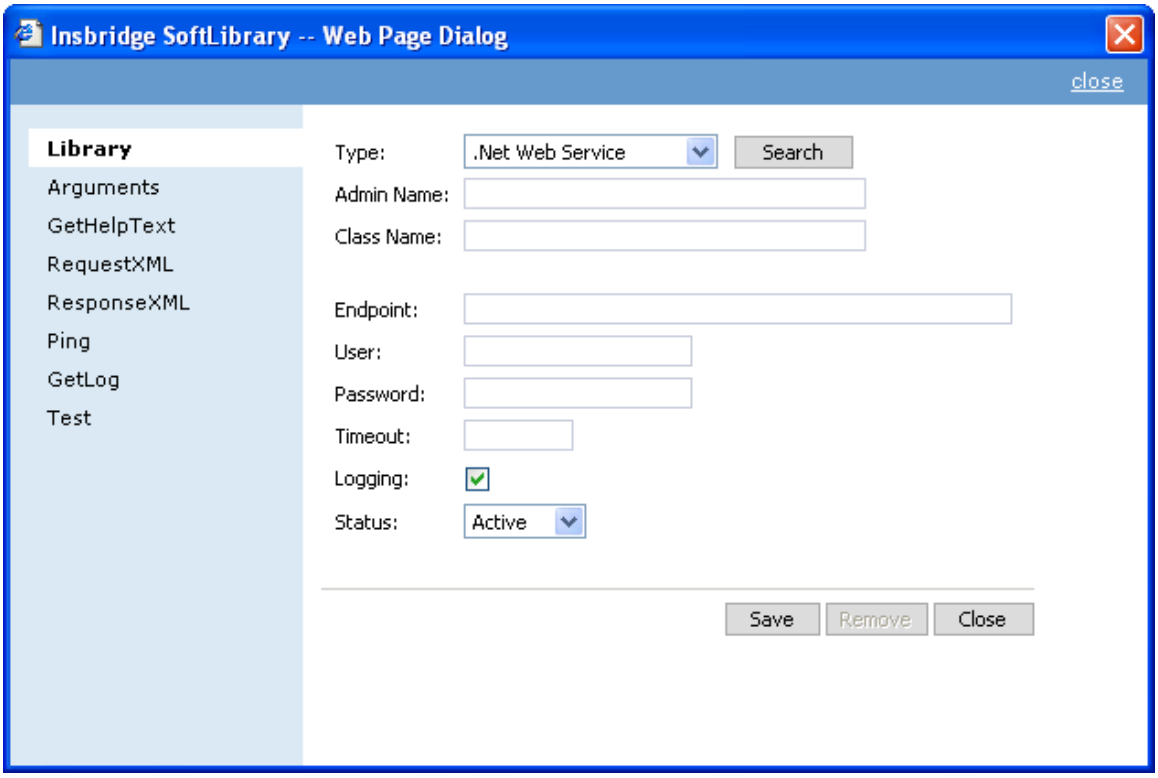


Figure 111 SoftLibrary Screen

The SoftLibrary screen will allow you to enter in basic information and to view critical information about the SoftLibrary. There are eight options on the side menu:

Library: The basic SoftLibrary information is entered here.

Arguments: Enter or edit the arguments for the SoftLibrary here.

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

Request XML: The request XML will be displayed here. This will tell you what requests you are sending out. This is an information only screen.

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

Ping: Will ping the server to verify server response.

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

Test: Allows you to test the SoftLibrary.

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

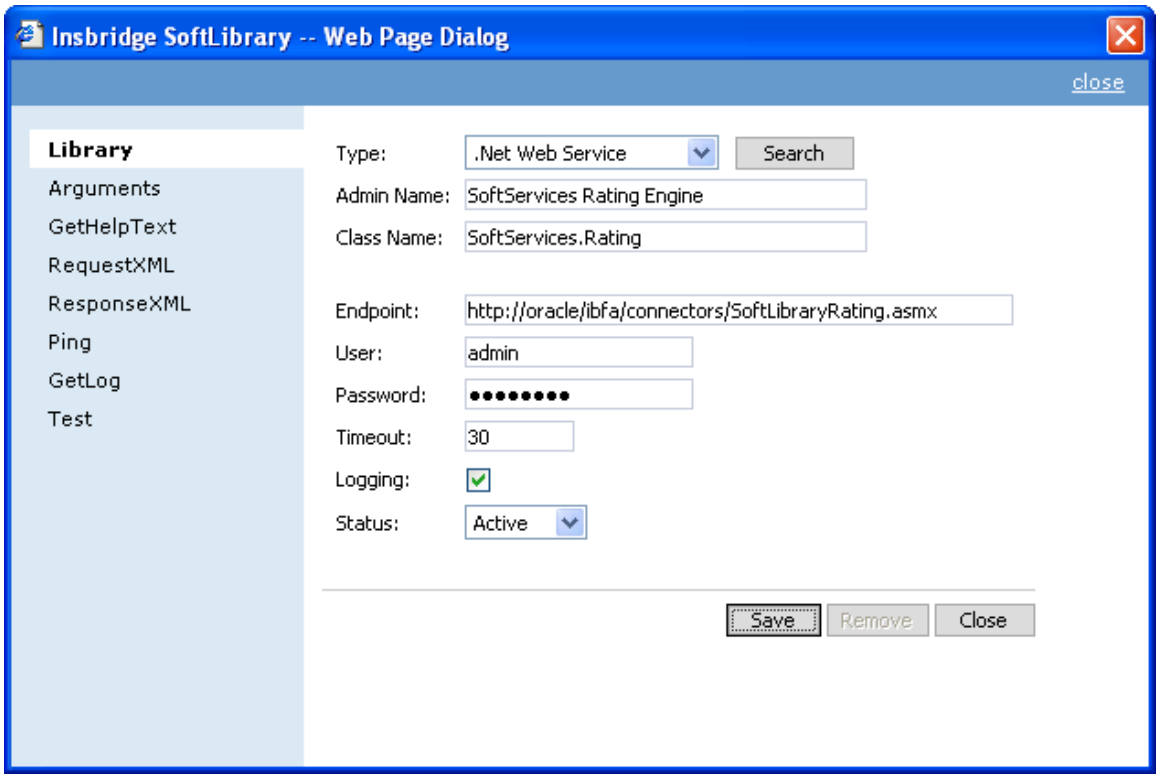


Figure 112 Completed SoftLibrary Screen

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

Admin Name: This is the name of the SoftLibrary as it is displayed in RateManager. It is also the name that will be displayed on the main SoftLibraries page. Admin names must be unique.
Class Name: This is the URL of the web service. This information can be obtained from the developer. Class names must be unique.

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

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

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

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

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

Status: The status of the SoftLibrary. If active is selected, the SoftLibrary will be displayed to RateManager users. If disable is selected, the SoftLibrary will not will be displayed to users. The default status is active.

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

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

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

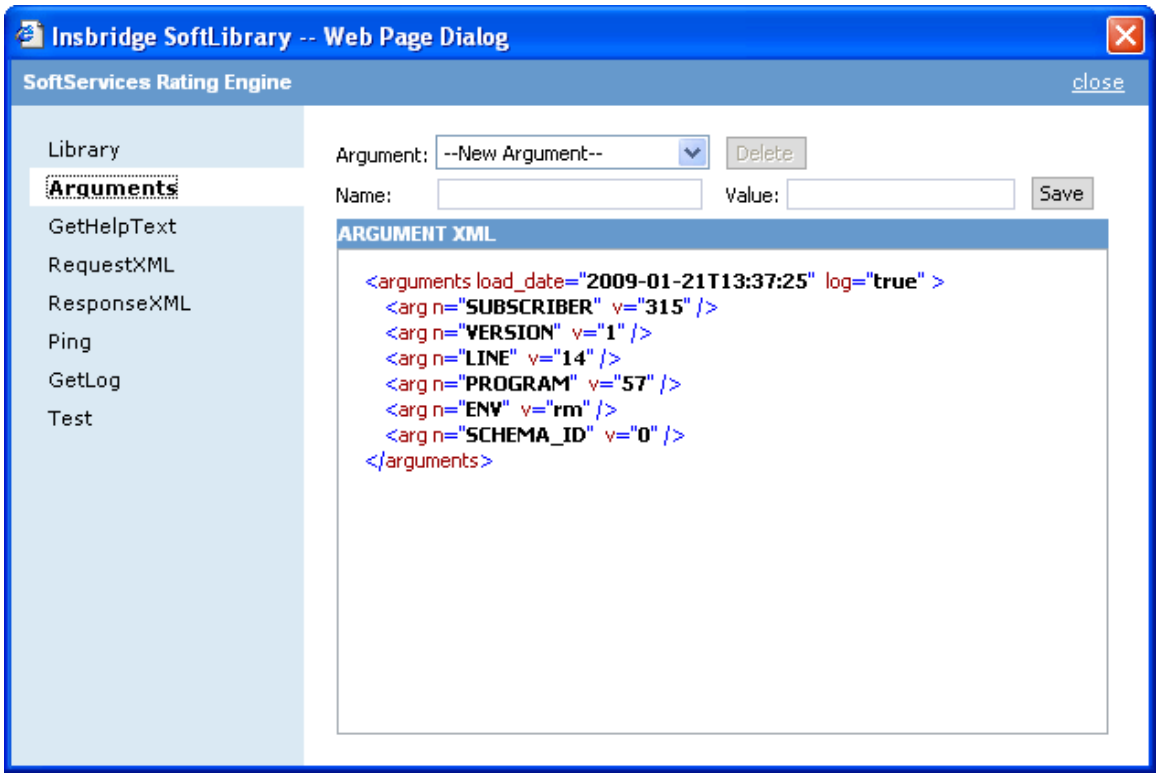


Figure 113 Arguments Screen

6. Select available **Arguments** from the drop down menu. The argument name will populate the **Name** field. The current value will populate the **Value** field. If these arguments are correct, click **Save**. If you need to, you can edit both the name field and the value field by typing in what you need.

Adding an Argument

To add an argument, select **--New Argument--** in the Argument drop down list. Enter in a **Name** and a **Value.** Click **Save**. Your argument will be listed below.

Editing an Argument

To edit an argument, select the argument from the Argument drop down list. Edit the **Name** and a **Value**. Click **Save**. Your argument will be listed below with the new values.

Deleting an Argument

If there is an argument that you do not need, you can delete it. Select the argument from the drop down menu and click the **Delete** button. The argument will be removed.

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

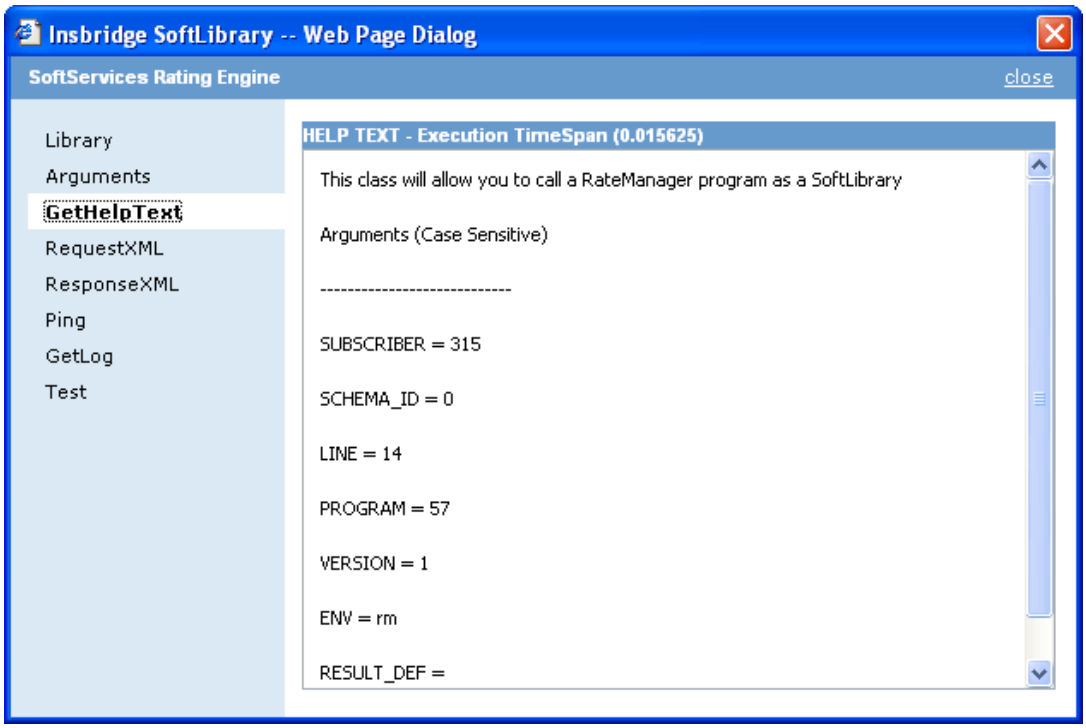


Figure 114 GetHelpText Screen

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

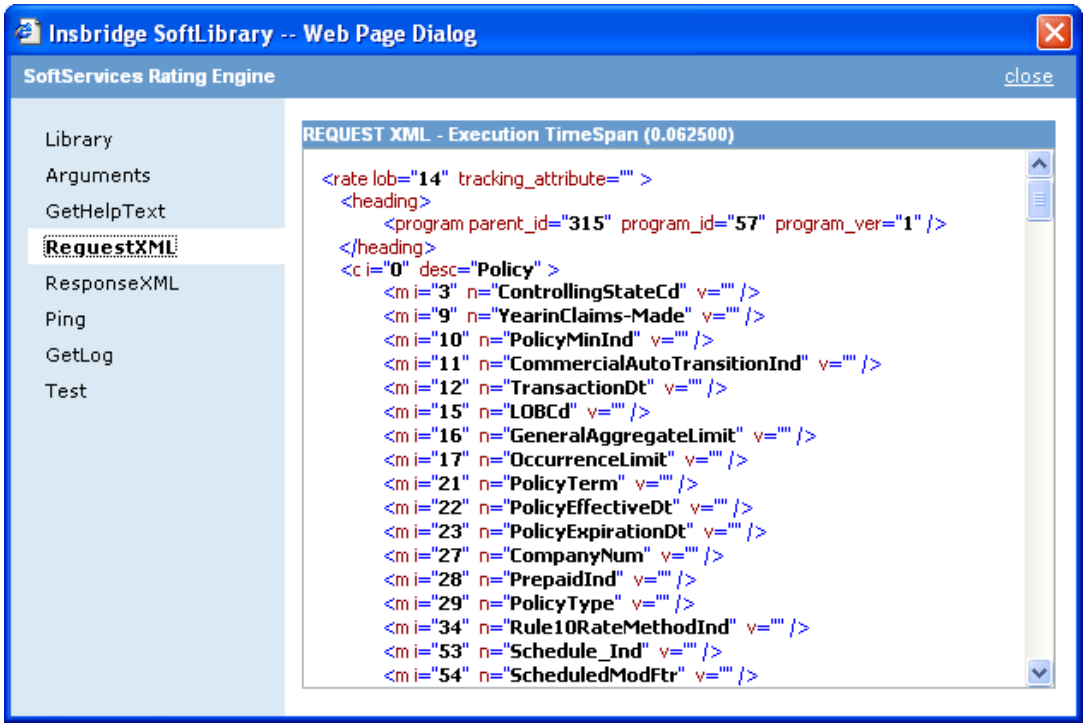


Figure 115 RequestXML Screen

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

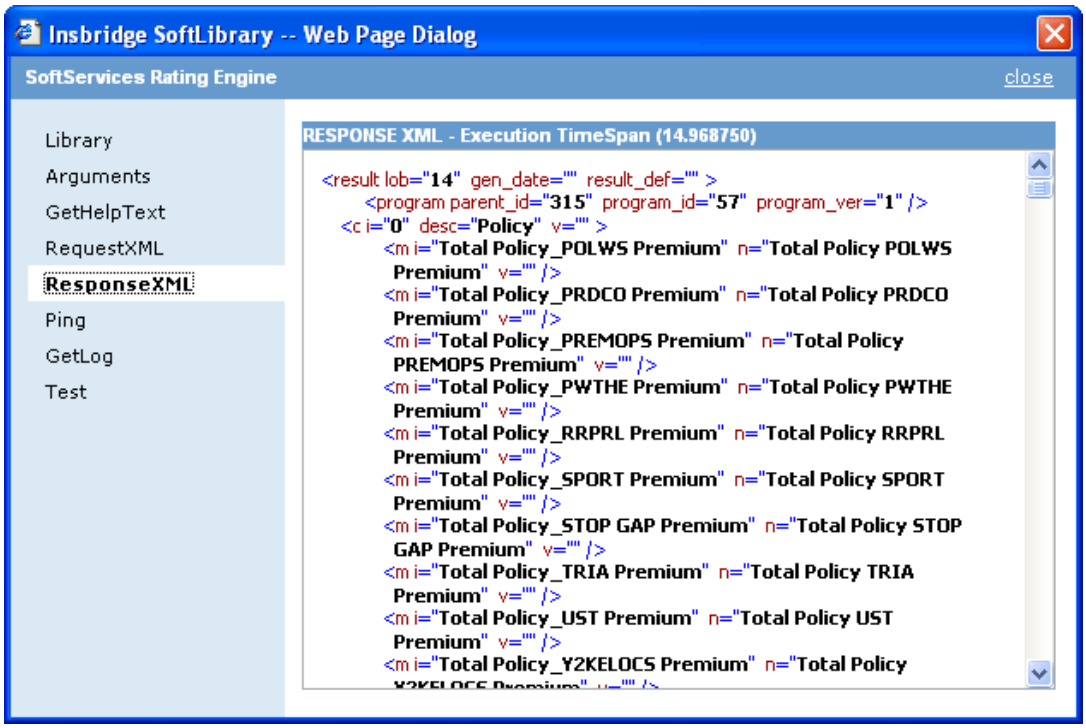


Figure 116 ResponseXML Screen

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

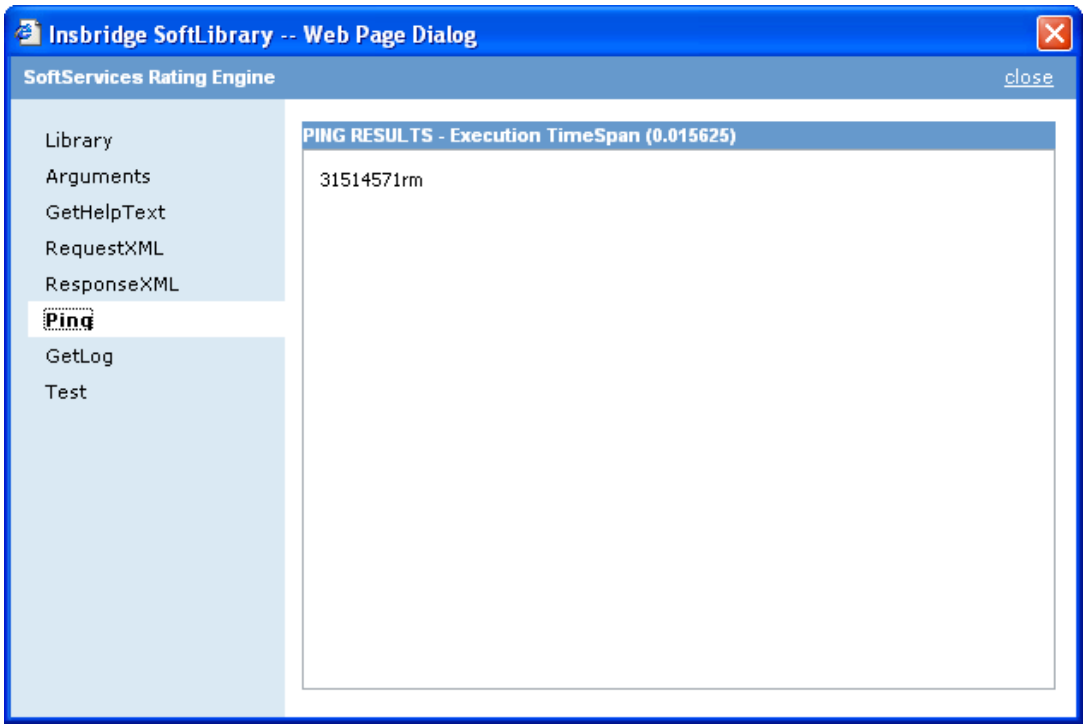


Figure 117 Ping Screen

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

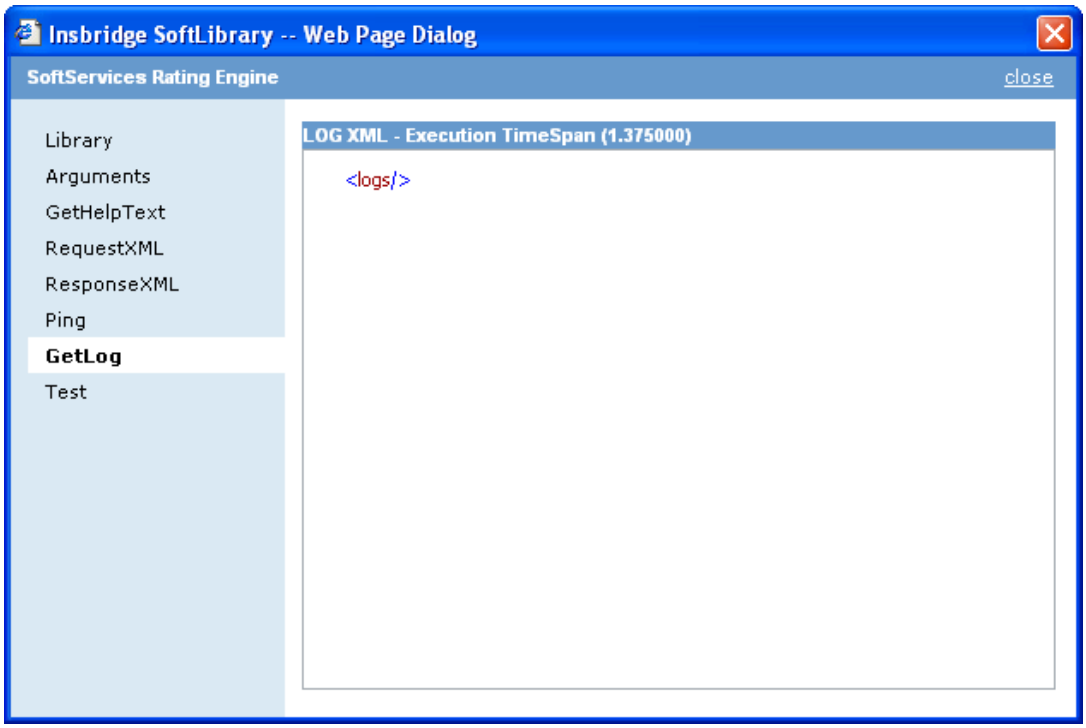


Figure 118 GetLog Screen

12. The last menu option is **Test**. Test has three parts. First you must enter in the RequestXML. You can enter in your own XML or you can click the RequestXml button and have the XML auto populate for you.

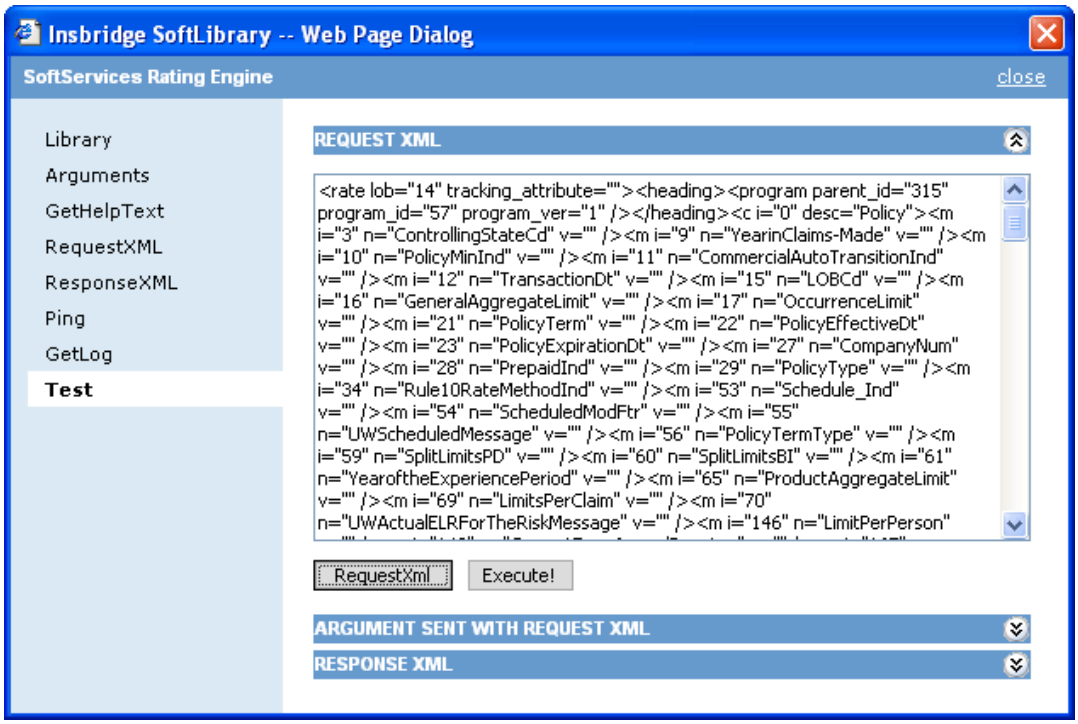


Figure 119 Test Screen – Request

13. Click the Execute! button to execute the XML. The responseXml will be displayed. To view the Arguments sent or to view the RequestXML, click the expand button .

Figure 120 Test Screen – Response

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

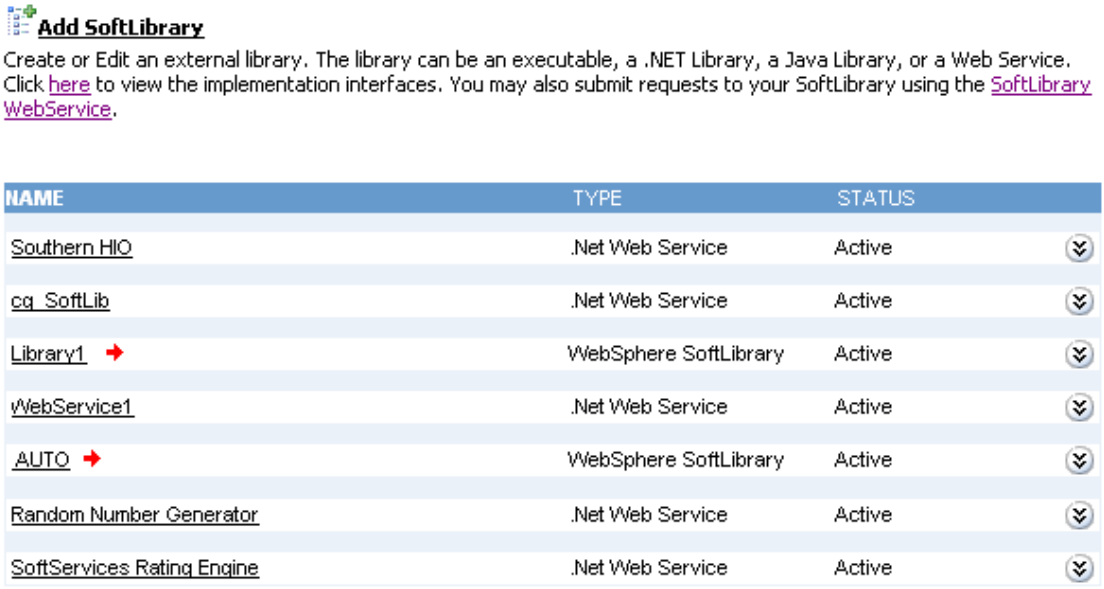


Figure 121 Completed SoftLibrary

Editing SoftLibraries

Any SoftLibrary can be edited at any time. Be aware that changes to a SoftLibrary here will affect any programs in RateManager that currently call this SoftLibrary without sending notice to users.

To edit a SoftLibrary, click on the name. The SoftLibrary screen will be displayed. Make your edits and click **Save**.

Deleting SoftLibraries

Any SoftLibrary can be deleted at any time. Be aware that changes to a library here will affect any programs in RateManager that currently call this SoftLibrary without sending notice to users.

To delete a SoftLibrary, click the name. The SoftLibrary screen will be displayed. Click the **Remove** button. A warning message will be displayed, click OK to remove the SoftLibrary. Click Cancel to return to the SoftLibrary screen.

Searching for a SoftLibrary

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

Figure 122 SoftLibrary Type Search

SOFTRATER UPDATES

This notice is for customers currently running a SoftRater for Java engine Release 3.12 or lower. This includes:

- **SoftRater for WebLogic**
- **SoftRater for WebSphere**
- **SoftRater for JBoss**

Necessary updates have been made to the SoftRater for Java engines. This includes:

- **SoftRater for WebSphere has been updated to SOAP version 1.1**.
- **SoftRater for WebLogic has been updated to SOAP version 1.2**.
- **SoftRater for JBoss has been updated to SOAP version 1.2**.

These changes mean that the WSDLs for the SoftRater for Java engines have been modified. Updated WSDL documents will need to be incorporated into any client calling application that communicates with SoftRater. If upgrades are done to the SoftRater for Java engines without updating the calling applications, the calling application will fail.

Please update a test environment prior to deploying to production. Install the .EAR file in a test environment to obtain the WSDL. Update your calling application and then test. When testing is complete, you can upgrade your other environments.

NOTE: *Customers running a Windows only environment, without a Java component, will not be affected.*

These updates are for the 3.13 and later releases of SoftRater for Java engines only.

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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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 Scenario:	A driver assignment scenario is a list of instructions that define the main sequence of operations to properly define the driver assignment logic for a carrier. A scenario is based upon the same algorithm principle used throughout

	the RateManager software.
E	
Export:	Exports allow users to export all elements of a program from one database to another database or within the same database. Or to export data in tab-delimited form, from a RateManager table to an outside location.
F	
Flag:	A variable that holds a 1 for true and a 0 for false.
Flag Driver Algorithm:	An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.
Flag Driver Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Driver Algorithm.
Flag Vehicle Algorithm:	An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.
Flag Vehicle Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Vehicle Algorithm.
G	
Global:	An input or variable that is available to all programs under a specific subline.
Global Input:	A value that is passed into the rating system.
Global Result:	A value that is passed out of the system after rating.
Group:	A set of users that have the same access rights.
I	
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.

Index

INDEX

<

<ibdoc>, 27

A

Accessing
  Insbridge Applications, 11
Active
  SoftLibrary Status, 122
Add a root node to the results?, 26
Add company descriptions to the results?, 27
Add Database Connection, 17
Add descriptions to the result items?, 27
Add Environment, 39
Add Results to Custom Inputs
  MapRequest Operators, 29
Add SoftLibrary Link, 119
Add Subscriber, 13
Add the program inputs to the results?, 27
AddHeading
  Operators, 27
Adding
  Arguments, 123
  Database, 17
  Environment, 38
  Line of Business, 41
  Root Node, 26
  SoftLibraries, 120
  Virtual File Server Management, 44
AddInputs
  Operators, 27
AddResultDesc
  Example, 27
  Operators, 27
AddResultEmpty
  Operators, 27
AddRoot
  Operators, 26
Admin Email Address
  Explorer Configuration Page, 36
Admin Name
  SoftLibraries, 122
Administrator
  Framework Security, 113
Age
  Error Logs, 107, 109
All
  Search Options, 80
API Key, 116
Application Errors
  Error Log, 108
Application Failure
  Error Log, 105
Arguments
  Adding, 123
  Deleting, 123
  Editing, 123
  SoftLibraries, 121
Arguments Screen, 123
Async
  Processing Options, 61, 83
Audit Events, 111
  Delete, 111
  Download, 111
  Load, 111
  Unload, 111
Audit Log, 112
  Overview, 111
  Viewing, 112
Audit Logs
  Backups, 82
Authentication
  Custom for Framework Administrator, 115
  Windows for Framework Administrator, 114
Authentication Types
  Changing, 113
  Custom, 113
  Framework Administrator, 113
  None, 113
  Windows, 113
Authoring Environment Definition, 131

B

Backups
  Async Option, 83
  Audit Logs, 82
  Checkbox, 82
  Create, 82
  Creating, 83
  Delete, 82, 83
  Deleting, 89
  Description, 82
  Download, 83
  Email Address Option, 83
  Environment Selection, 82
  Error Messages, 85
  Get Listing, 82
  LOB, 82
  Processing Options, 83
  Release Date, 82
  Right Click Options, 82
  Save to File, 86
  Show Details, 83, 91
  Size, 82
  Success Messages, 85
  Sync Option, 83
  View Environment Report, 83, 92
  Zip Files, 88

C

Cache
  Configuring, 32
  Enabled, 32
  Misses, 32
Cache Enabled Date
  Cached Program Listing, 33
  Time Stamp, 33
Cached Program Listing
  Cache Enabled Date, 33
  Environment, 32
  Package Creation Date, 33
  Program Cache Settings, 32
  Remove, 32
  Total Hit Rows, 32
  Total Miss Rows, 33
Category Miss Buffer Purge
  Program Cache Settings, 32
Certifying
  Packages in Directory, 50, 54
Change Config File location, 22
Changing
  Administrator Email, 102
  Authentication Type, 113
  Configuration File Location, 22
  Password, 117
  Threads in Framework Administrator, 102
Chekbox
  Backups, 82
  Packages, 60
Class Name
  SoftLibraries, 122
Configuration
  SoftRater Engine, 30
Configuration File
  Changing Location, 22
  Explorer Configuration Page, 36
  Overview, 21
  Viewing, 21
Configuration Page
  SoftRater Explorer, 35
Configuration Subtab
  Virtual File Server Management, 44, 45
Configure
  Insbridge Applications, 11
Configuring
  Cache, 32
  Environment, 49
Content Tab
  SoftRater Explorer, 56
Cookie
  Custom Authenication, 115
Copy SRP
  Packages, 61
Copy SRP…, 70
Copying
  Message, 100
  Package, 69
Create
  Backups, 82
Creating
  Backups, 83
Custom
  Authentication Types, 113
  Engine Type, 31
  Mapping, 28, 29
Custom Authentication
  Changing Password, 117
  Framework Administrator, 115
  Updating Password, 117
Custom Engine Type, 33
  Adding, 34
  Editing, 33
Custom Input XML
  MapRequest Operators, 28
Custom Output XML
  MapRequest Operators, 29

D

Database
  Adding, 17
  Deleting, 19
  Editing, 19
Database Events
  Error Log, 105, 106
  Example of Error Log, 106
  Sending Error Log, 108
  Viewing Error Log, 106
Datastore
  Search Options, 79
Date Filter
  Search Options, 80
DB Schema
  Environment, 51
DB Server
  Environment, 50
DB Server Type
  Environment, 50
DB2
  Supported Database, 50
DB2 Registered Alias Name
  DB Server, 50
DB2 Servers, 50
Debug Rate?, 27
DebugRate
  Operators, 27
Default
  API Key, 116
Delete
  Audit Events, 111
  Backups, 82, 83
  Packages, 59, 61
Delete Package, 72
Deleting
  Arguments, 123
  Backups, 89
  Database, 19
  Line of Business, 42
  Message, 100
  Package, 71
  SoftLibraries, 128
  Subscriber, 15

Virtual File Server Management, 46
Deployment Notes
Package, 77
Desc
Search Options, 80
Description
Backups, 82
Packages, 60
Subscriber, 14
Details
Local Insbridge Input Translators, 77
Package Notes, 77
Package, Insbridge Rating Input XML, 77
Package, Insbridge Rating Output XML, 77
Translator Files, 77
Directory
Options for Environment, 50, 54
Download
Audit Events, 111
Backups, 83
Packages, 59, 61
Downloading
Package, 62

E

Edit Database, 20
Edit Environment, 40
Edit Subscriber, 15
Editing
Arguments, 123
Database, 19
Environment, 39
Line of Business, 42
Process Configuration, 102
SoftLibraries, 128
Subscriber, 15
Virtual File Server Management, 45
Edition Notice, 2
Email
Changing Administrator, 102
Email Address
Processing Options, 61, 83
Email Addresses
Entering for Packaging Operations, 36
Enabled
Buttons for Message Service, 97, 104
Cache, 32
Program Cache Settings, 32
Endpoint
SoftLibraries, 122
Engine Type
Custom, 33
Custom Connectors, 31
SoftRater Engine Configuration Page, 31
SoftRater for Windows, 31
Environment
Adding, 38
Cached Program Listing, 32
Configuring, 49
Copying Packages, 69
DB Schema, 51
DB Server, 50
DB Server Type, 50
Deleting Rules, 40
Editing, 39
Full Package, 58
JBoss, 39
Moving Packages, 68
Options, 50, 54
Overview, 38
Secure, 39
SoftRater Full Packages, 58
Environment Types, 39
Environments
Backups, 82
Packages, 59
EnvRef
Operators, 27
Error Log, 105, 106, 109
Database Events, 105, 106
Event Log Events, 105, 108
Navigating, 105
Overview, 105
Errors
Messages, Backups, 85
Messages, Package, 63, 65, 67, 72
OBI Publisher, 98
ESI
Overview, 116
Event Log Events
Error Log, 105, 108
Example of Error Log, 108
Sending Error Log, 111
Viewing Error Log, 109
Example
AddResultDesc, 27
Error Log of Database Events, 106
Error Log of Event Log Events, 108
Execution Time
Stats for SoftRater Engine, 32
Explorer
Configuration Page, 35
Navigating to Configuration Page, 35
SoftRater, 35
Explorer Configuration Page
Admin Email Address, 36
Configuration File, 36
Internet Proxy, 36
Intranet Credentials, 36
External Services
Custom Engine Type, 33

F

File
InsbridgeDataRequest.XML Format, 94
Rating on Test, 24
Testing Input, 24
Testing SoftData Test Interface, 94
Framework Administrator
Authentication Types, 113
Changing Password, 117
Custom Authentication, 115

Full Control of Directory, 50, 55
Login Credentials, 116
Secure Environments, 39
Security Overview, 113
SoftLibraries, 118
Updating Password, 117
Windows Authentication, 114
Framework Security
IIS, 114
Microsoft Internet Information Services, 114
Full Packages
SoftRater, 58

G

Get File, 94
Get Listing
Backups, 82
Packages, 59
Get Listing!, 62, 63, 66, 68, 69, 71, 74, 80
GetHelpText
SoftLibraries, 121
GetHelpText Screen, 124
GetLog
SoftLibraries, 121
GetLog Screen, 126
Global
Mapping, 28, 29
Search Options, 79
Global Inputs, 28, 29

I

IBFA
Accessing, 11
System Configuration, 116
IBFA Definition, 132
IBRU Definition, 132
IBSS Definition, 132
Icons
Packages, 59
Releases, 59
ID
Subscriber, 14
IIS
Framework Security, 114
Implementation Interfaces
Required, 119
Include empty items in the results?, 27
Input
Testing Files, 24
Input Processor Name
MapRequest Operators, 29
Input Processor Type
MapRequest Operators, 28
Insbridge Database Events
Error Logs, 107, 109
Insbridge Document Viewer
Saving, 93
Insbridge Framework Administrator
Overview, 11
Insbridge Message Service, 98
OBI Publisher, 98
Overview, 97
Insbridge Page
Navigating, 12
Overview, 12
Insbridge Rating Input XML
Package Details, 77
Insbridge Rating Output XML
Package Details, 77
Insbridge Task Manager
Overview, 103
Viewing, 104
InsbridgeDataRequest.XML Format
Request File, 94
Instance
Oracle Servers, 51
Internet Proxy
Explorer Configuration Page, 36
Intranet Credentials
Explorer Configuration Page, 36

J

JBoss
Environment, 39

L

Last Month
Search Options, 80
Library
SoftLibraries, 121
Library Information Screen, 121
Line of Business
Adding, 41
Deleting, 42
Editing, 42
MapRequest Operators, 28
Line-of-Business Management, 41, 42
Links
Add SoftLibrary, 119
Load
Audit Events, 111
Packages, 59, 61
Load Packages, 62, 64
Loaded
Deleting a Package, 71
Loading
Package, 63
LOB
Backups, 82
Packages, 60
Search Options, 80
Local
Mapping, 28, 29
Local Insbridge Input Translators
Package Details, 77
Local Package, 58
LOCALHOST
Engine Location, 51
Logging
SoftLibraries, 122

Logical Environment Definition, 133
Logs, 105

M

Mapping
  Custom, 28, 29
  Global, 28, 29
  Local, 28, 29
MapRequest Operators, 28
  Add Results to Custom Inputs, 29
  Input Process Type, 28
  Input Processor Name, 29
  Line of Business, 28
  Output Processor Name, 29
  Output Processor Type, 29
  Program, 28
  Subscriber, 28
  Version, 28
Menu Bar
  Releases, 59, 82
Message
  Copying, 100
  Deleting, 100
  Overview, 98
  Viewing, 98
Message Queue
  Viewing, 98
Message Service
  Queues, 98
  Stopping & Starting, 97
Microsoft Internet Information Services
  Framework Security, 114
Misses
  Cache, 32
Move SRP
  Packages, 61
Move SRP…, 69
Moving
  Package, 68

N

Name
  SoftLibraries, 118
  Subscriber, 14
Navigating
  Error Log, 105
  Explorer Configuration Page, 35
  Insbridge Page, 12
  Services Page, 96
  SoftRater Content, 56
  SoftRater Engine Configuration Page, 30
  Subscriber Settings Tab, 37
None
  Authentication Types, 113
  Search Options, 80

O

OBI Publisher, 98
On Disk
  Search Options, 80
Operators
  AddHeading, 27
  AddInputs, 27
  AddResultDesc, 27
  AddResultEmpty, 27
  AddRoot, 26
  DebugRate, 27
  EnvRef, 27
  Optional, 24
  Optional Map Request, 28
  Optional Rate, 26
Optional Map Request Operators, 28
Optional Operators, 24
Optional Rate Operators, 26
  AddHeading, 27
  AddInputs, 27
  AddResultDesc, 27
  AddResultEmpty, 27
  AddRoot, 26
  DebugRate, 27
  EnvRef, 27
Options
  Environment, 50, 54
  MapRequest Operators, 28
  Rate Operators, 26
Oracle
  Supported Database, 50
Oracle Servers
  Instance, 50
Oracle XE
  Supported Database, 50
Output Processor Name
  MapRequest Operators, 29
Output Processor Type
  MapRequest Operators, 29
Overview
  Audit Log, 111
  Configuration File, 21
  Environment, 38
  Error Log, 105
  ESI, 116
  Framework Administrator Security, 113
  Framework Administrator SoftLibraries, 118
  Insbridge Framework Administrator, 11
  Insbridge Message Service, 97
  Insbridge Page, 12
  Insbridge Task Manager, 103
  Message, 98
  Package, 58
  Package Unload, 66
  Process Configuration, 102
  Services Page, 96
  SoftData Test Interface, 94
  SoftRater Engine Configuration, 30
  SoftRater Explorer, 35
  SoftRater Test Interface, 24
  Subscriber, 13
  Threading, 102
  Virtual File Server Management, 44

P

Package
- Async Option, 61
- Copy SRP…, 70
- Copying, 69
- Date Filter, 80
- Date Filter, Last Month, 80
- Date Filter, None, 80
- Date Filter, This Month, 80
- Delete Package, 72
- Deleting, 71
- *Deleting a Loaded*, 71
- Desc, 80
- Details, Viewing, 76
- Downloading, 62
- Email Address Option, 61
- Environment, 38
- Error Messages, 63, 65, 67, 72
- Full, 58
- Hiding Toolbar, 80
- Insbridge Rating Input XML Details, 77
- Insbridge Rating Output XML Details, 77
- Listing, 62, 63, 66, 68, 69, 71, 76, 79
- Loading, 63
- LOB, 80
- Local, 58
- Move SRP…, 69
- Moving, 68
- Note Details, 77
- Overview, 58
- Package Status, 80
- Package Status, All, 80
- Package Status, On Disk, 80
- Processing Options, 61
- Program, 80
- *Reloading*, 65
- Remote Listing, 79
- Remote Listing, Datastore, 79
- Remote Listing, Global, 79
- Remote Listing, Subscriber, 79
- Search Options, 79
- Searching, 79
- Show Details, 76
- SoftRater Environment, 58
- Success Messages, 63, 65, 67, 72
- Sync Option, 61
- Testing, 24
- Unload Overview, 66
- *Unloaded*, 65
- Unloading, 66
- Version, 80
- Viewing Details, 76

Package Activity
- SoftRater Audit Log, 111

Package Creation Date
- Cached Program Listing, 33
- Time Stamp, 33

Package Location Definition, 133

Package Status
- Search Options, 80

Packages
- Checkbox, 60
- Copy SRP, 61
- Delete, 59, 61
- Description, 60
- Download, 59, 61
- Environment Selection, 59
- Get Listing, 59
- Icons, 59
- Load, 59, 61
- LOB, 60
- Move SRP, 61
- Release Date, 60
- Reload Page, 61
- Remote Environments Selection, 59
- Right Click Options, 60
- Show Details, 61
- Size, 60
- Unload, 61

Packages Subtab
- Filter Results, 41

Packaging Options
- Entering Admin Email Address, 36

Password
- Changing, 117
- Changing Framework Administrator, 117
- Framework Administrator, 116
- SoftLibraries, 122
- Updating Framework Administrator, 117

Permissions
- Validating on Directory, 50, 54

Physical Environment Definition, 133

Ping
- SoftLibraries, 121

Ping Screen, 125

Process Configuration, 102
- Editing, 102
- Overview, 102

Processing Options
- Async, 61, 83
- Backups, 83
- Email Address, 61, 83
- Package, 61
- Sync, 61, 83

Program
- MapRequest Operators, 28
- Search Options, 80

Program Cache Settings
- Cached Program Listing, 32
- Category Miss Buffer Purge, 32
- Enabled, 32
- SoftRater Engine Configuration Page, 32

Program Difference Report
- Viewing, 93

Program Inputs XML, 41

Proxy Settings
- Entering for Packaging Operations, 36

Q

Queues
- Message, 98

R

Rate Operators, 26
RateManager
  Adding Subscribers, 13
  Packages, 58
  SoftLibraries, 119
  Supported Databases, 50
  XML ID, 41
Rating
  File on Test, 24
Rating Environment Definition, 134
Registration Type
  SoftLibraries, 128
Release Date
  Backups, 82
  Packages, 60
Releases
  Icons, 59
  Menu Bar, 59, 82
Reload Page
  Packages, 61
Reloading
  Package, 65
Remote
  Packages, 59
Remote Listing
  Search Options, 79
Remote SoftLibraries, 120
Remove
  Cached Program Listing, 32
Request File
  InsbridgeDataRequest.XML Format, 94
RequestXML
  SoftLibraries, 121
RequestXML Screen, 124
Required
  Implementation Interfaces, 119
ResponseXML
  SoftLibraries, 121
ResponseXML Screen, 125
Results
  Adding Descriptions, 27
  Root Node Information, 27
Right Click Options
  Backups, 82
  Packages, 60
RM Definition, 134
Root Node
  Adding, 26
Rules
  Deleting Environment, 40
  Deleting Subscriber, 15
Run Time
  SoftRater, 26

S

Save to File
  Backups, 86
Saving
  Insbridge Document Viewer, 93
Search
  Hiding Toolbar, 80
Search Options
  All, 80
  Datastore, 79
  Date Filter, 80
  Desc, 80
  Global, 79
  Last Month, 80
  LOB, 80
  None, 80
  On Disk, 80
  Package, 79
  Package Status, 80
  Program, 80
  Remote Listing, 79
  Subscriber, 79
  This Month, 80
  Version, 80
Searching
  Package, 79
  SoftLibrary Type, 128
Secure
  Environment, 39
Security, 113
Sending
  Error Log of Database Events, 108
  Error Log of Event Log Events, 111
Server Setup
  Downloadable Packages, 44
Services Page
  Navigating, 96
  Overview, 96
Settings
  Thread, 102
Settings Tab, 37
  Config Tab, 37
Show Details, 91
  Backups, 83
  Packages, 61, 76
Show Framework Admin Menu, 115
Size
  Backups, 82
  Packages, 60
SoftData Test Interface
  Overview, 94
  Testing, 94
SoftLibraries, 118
  Adding, 120
  Admin Name, 122
  Arguments, 121
  Class Name, 122
  Deleting, 128
  Displaying in RateManager, 119
  Editing, 128
  Endpoint, 122
  Fields, 119
  GetHelpText, 121
  GetLog, 121
  Implementation Interfaces, 119
  Library, 121
  Logging, 122

Name, 118
Password, 122
Ping, 121
RequestXML, 121
ResponseXML, 121
Searching for Library Type, 128
Status, 118, 122
Test, 121
Timeout, 122
Type, 118, 122
User Name, 122
Using Web Services, 119
WebSphere, 120
Windows, 120
SoftRater
Determining Run Time, 26
Package Activity Audit Log, 111
Supported Databases, 50
Verifying Input Values, 27
SoftRater Content
Navigating, 56
SoftRater Engine
Configuration, 30
Engine Type, 31
Navigating to Configuration Page, 30
Program Cache Settings, 32
Stats, 32
Stats, Execution Time, 32
Stats, Start Time, 32
Stats, Stop Time, 32
Time Stamp, 32
Web Rate Threads, 32
SoftRater Environment
Full Packages, 58
SoftRater environment definition override?, 27
SoftRater Explorer
Configuration Page, 35
Copying a Package, 69
Creating a Backup, 83
Deleting Backups, 89
Deleting Package, 71, 73
Downloading Package, 62
Load Packages, 62, 64
Loading Packages, 63
Moving a Package, 68
Overview, 35
Save to File, 86
Searching for Packages, 79
Show Details, 91
Unloading Package, 66
View Environment Report, 92
Viewing Package Details, 76
SoftRater for Windows
Engine Type, 31
SoftRater Node Definition, 134
SoftRater Packages
Environments, 38, 133
SoftRater Test Interface
Overview, 24
SQL Server
Supported Database, 50
SR Definition, 134
SR-JAVA Definition, 134
SRP, 24, 58
SRP Definition, 134
SR-WIN Definition, 134
Start Button
Message Services, 97, 104
Start Time
Stats for SoftRater Engine, 32
Starting
Insbridge Message Service, 97
Insbridge Task Manager, 103
Stats
SoftRater Engine Configuration Page, 32
Status
SoftLibraries, 118, 122
Stop Button
Message Services, 97, 104
Stop Time
Stats for SoftRater Engine, 32
Stopping
Insbridge Message Service, 97
Insbridge Task Manager, 103
Sublines, 15
Subscriber
Deleting, 15
Deletion Rules, 15
Editing, 15
Information, 14
Information for Database, 18
MapRequest Operators, 28
Overview, 13
Search Options, 79
Types, 13
Subscriber Settings
Content Tab, 56
Navigating, 37
Subscriber Type, 15
Success
Messages, Backups, 85
Messages, Package, 63, 65, 67, 72
Supported Databases, 50
RateManager, 50
SoftRater, 50
Supported Operations
Web Services, 119
Sync
Processing Options, 61, 83
System Configuration
IBFA, 116
System DSN Name
DB Catalog, 51

T

Task Manager
Stopping & Starting, 103
Test
SoftLibraries, 121
Test Interface
Rating a File, 24
Test Screen, 126
Testing

Input Files, 24
SoftData Request File, 94
SoftData Test Interface, 94
This Month
Search Options, 80
Threading
Overview, 102
Threads
Changing in Framework Administrator, 102
Setting, 32
Settings, 102
Time Stamp
Cache Enabled Date, 33
Package Creation Date, 33
SoftRater Engine, 32
Timeout
SoftLibraries, 122
Toolbar
Hiding, 80
Total Hit Rows
Cached Program Listing, 32
Total Miss Rows
Cached Program Listing, 33
Translator Files
Package Details, 77
Type
SoftLibraries, 118, 122
Subscriber, 14
Types
Environment, 39
Framework Administrator Authentication, 113
Input Mapping, 28, 29
Subscriber, 13

U

Unload
Audit Events, 111
Package, 65, 66
Packages, 61
Unloading
Package, 66
User ID
Framework Administrator, 116
User Name
SoftLibraries, 122
User Violations
Error Log, 105, 106

V

Version
MapRequest Operators, 28
Search Options, 80
VFS Definition, 44, 135
View Environment Report, 92
Backups, 83
View XML
Internet Explorer, 26, 95
Viewing
Audit Log, 112
Configuration File, 21
Error Log of Database Events, 106
Error Log of Event Log Events, 109
Insbridge Task Manager, 104
Message, 98
Message Queue, 98
Package Details, 76
Program Difference Report, 93
Virtual File Server Definition, 44, 135
Virtual File Server Management, 44, 45
Adding, 44
Deleting, 46
Editing, 45
Overview, 44

W

Web Rate Threads
SoftRater Engine Configuration Page, 32
Web Services
Supported Operations, 119
WebSphere
SoftLibrary, 120
Windows
Authentication Types, 113
SoftLibrary, 120
Windows Authentication
Framework Administrator, 114

X

XML
Submitting Custom, 28
View Input Details, 77
View Output Details, 77
XML Files
Testing a Rating, 25
XML ID, 41

Z

Zip Files
Backups, 88