

**Oracle Insurance**

**Insbridge Rating and  
Underwriting  
SoftRater Server User  
Guide**

Release 4.1

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Oracle Insurance Insbridge Rating and Underwriting SoftRater Server User Guide

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## PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting SoftRater Server User Manual*. This manual describes the settings and options of Oracle Insurance Insbridge Rating and Underwriting SoftRater Server (IBSS). IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within the Oracle Insurance Insbridge Rating and Underwriting (IBRU) system that executes the rules, rating and underwriting instructions as defined by the user in Oracle Insurance Insbridge Rating and Underwriting RateManager.

The SoftRater engine is an EJB component hosted in the Application Server and accessible through HTTP SOAP Proxy, HTTP POST, and EJB – Direct JNDI interfacing. A database management system is used for content storage with support for all major DBMS vendors.

IBSS runs on:

- Oracle WebLogic (WebLogic)
- JBoss, a division of Red Hat (JBoss)
- IBM WebSphere (WebSphere)

## AUDIENCE

This manual is intended for system administrators who are tasked with setting up and managing Insbridge rating environments. Users should be familiar with their company's environments, databases 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
<b>bold</b>	Boldface type indicates graphical user interface elements associated with an action.
<i>Italic</i>	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
1 <sup>st</sup> Edition	P01-729-01	V 3.5	June 2005	
2 <sup>nd</sup> Edition	P01-729-02	V 3.6	June 2006	Update
3 <sup>rd</sup> Edition	P01-729-03	V 3.7	December 2006	Update Version
4 <sup>th</sup> Edition	P01-729-04	V 3.8	July 2007	Update Version
5 <sup>th</sup> Edition	P01-729-05	V 3.8.3	October 2007	Update Version
6 <sup>th</sup> Edition	P01-729-06	V 3.8.5	November 2007	Update Version
7 <sup>th</sup> Edition	P01-729-07	V 3.8.7	January 2008	Update Version
8 <sup>th</sup> Edition	P01-729-08	V 3.8.8	March 2008	Update Version
9 <sup>th</sup> Edition	P01-729-09	V 3.9	May 2008	Update Version
10 <sup>th</sup> Edition	P01-729-10	V 3.10	October 2008	Update Version
11 <sup>th</sup> Edition	P01-729-11	V 3.11	December 2008	Update Version
12 <sup>th</sup> Edition	P01-729-12	V 3.12	July 2009	Update Version
13 <sup>th</sup> Edition	P01-729-13	V 3.13	December 2009	Update Version
14 <sup>th</sup> Edition	P01-729-14	R 4.0	April 2010	Update Version
15 <sup>th</sup> Edition	P01-729-15	R 4.0.1	August 2010	Update Version
16 <sup>th</sup> Edition	P01-729-16	R 4.1	December 2010	Update Version

# INTRODUCTION TO SOFTRATER SERVER

Oracle Insurance Insbridge Rating and Underwriting SoftRater Server (IBSS) is an administrative tool used in conjunction with SoftRater for WebLogic, JBoss, or WebSphere. It allows you to:

- Configure the SoftRater for WebLogic engine
- Configure the SoftRater for JBoss engine
- Configure the SoftRater for WebSphere engine
- Rate test files
- Execute a SoftData request
- Enter a SoftLibrary

## Variations between, WebLogic, JBoss, and WebSphere

There are a few differences between WebLogic, JBoss, and WebSphere on IBSS:

- The ports are different.
  - WebLogic uses port 7001
  - JBoss uses port 8080
  - WebSphere uses port 9080
- WebLogic and JBoss do not use the Edit SOAP Deployment Configuration Settings. It is not required.
- The WebLogic and JBoss Get SoftRater WSDL Files option will have different file options.

These differences will be detailed throughout this guide.



## WebSphere

For a WebSphere environment, IBSS can be accessed by going to `http://<yourserver>:9080/IBSS`, where `<yourserver>` is the server the IBSS is installed on.

If you do not know this information, contact your system administrator.

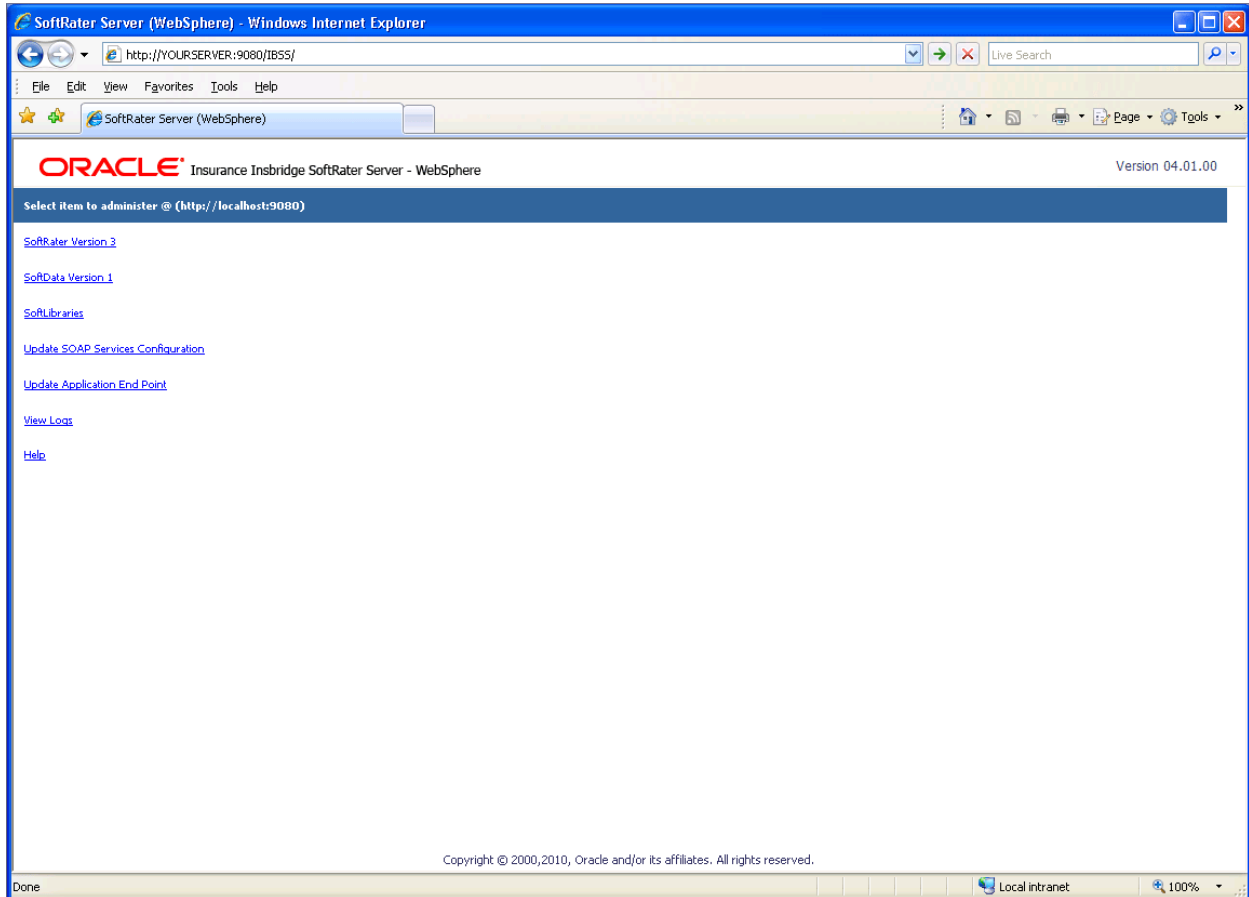


Figure 1 SoftRater Server for WebSphere

---

**NOTE:** *The top of the screen will list the platform you are on and the version of IBSS.*

---

---

**NOTE:** *If the designated port is unavailable or there is a conflict, your system administrator can change the port. If you cannot find the IBSS instance you need at the port location specified, please check the port being used with your system administrator.*

---

## JBoss

For a JBoss environment, IBSS can be accessed by going to `http://<yourserver>:8080/IBSS/`, where `<yourserver>` is the server the IBSS is installed on.

If you do not know this information, contact your system administrator.

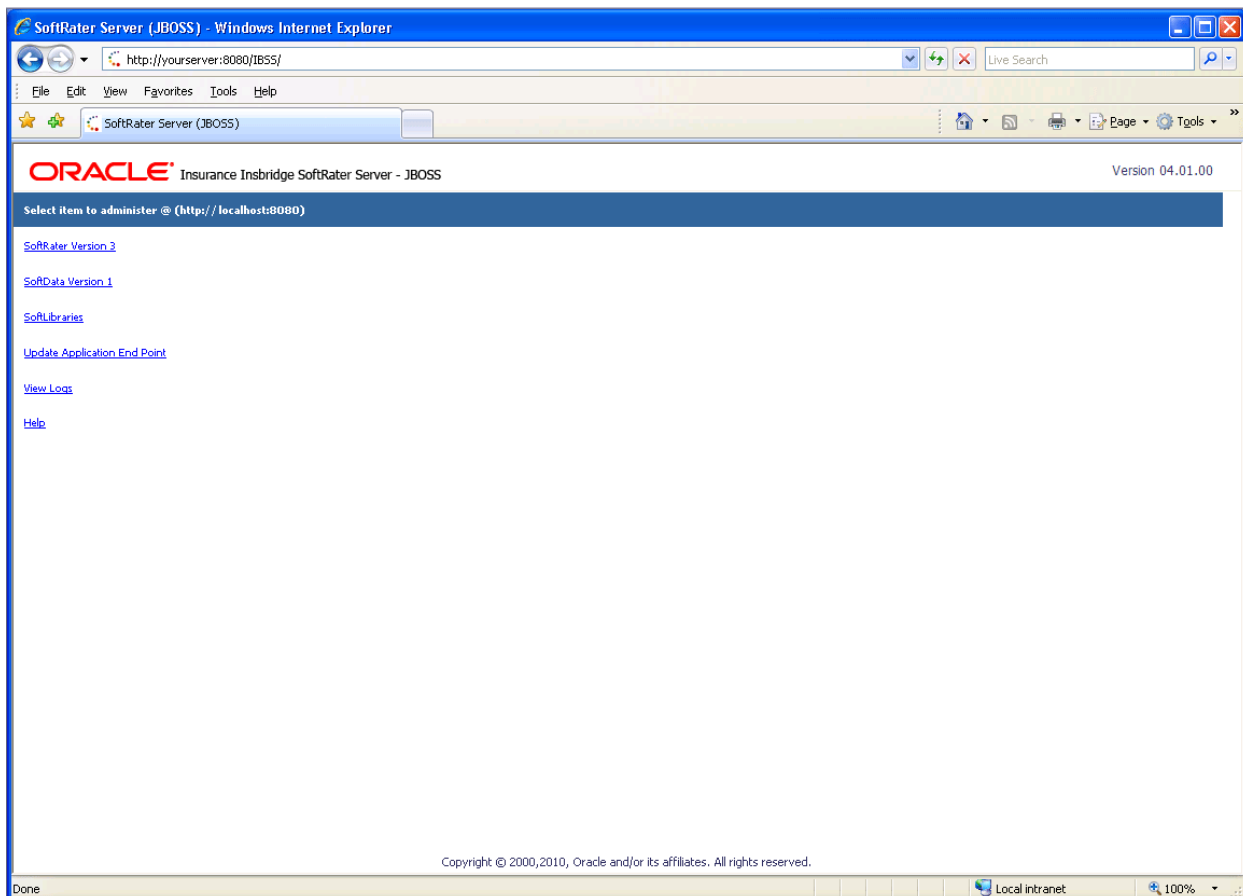


Figure 2 SoftRater Server for JBoss

---

**NOTE:** The top of the screen will list the platform you are on and the version of IBSS.

---

## WebLogic

For a WebLogic environment, IBSS can be accessed by going to `http://<yourserver>:7001/IBSS/`, where `<yourserver>` is the server the IBSS is installed on.

If you do not know this information, contact your system administrator.

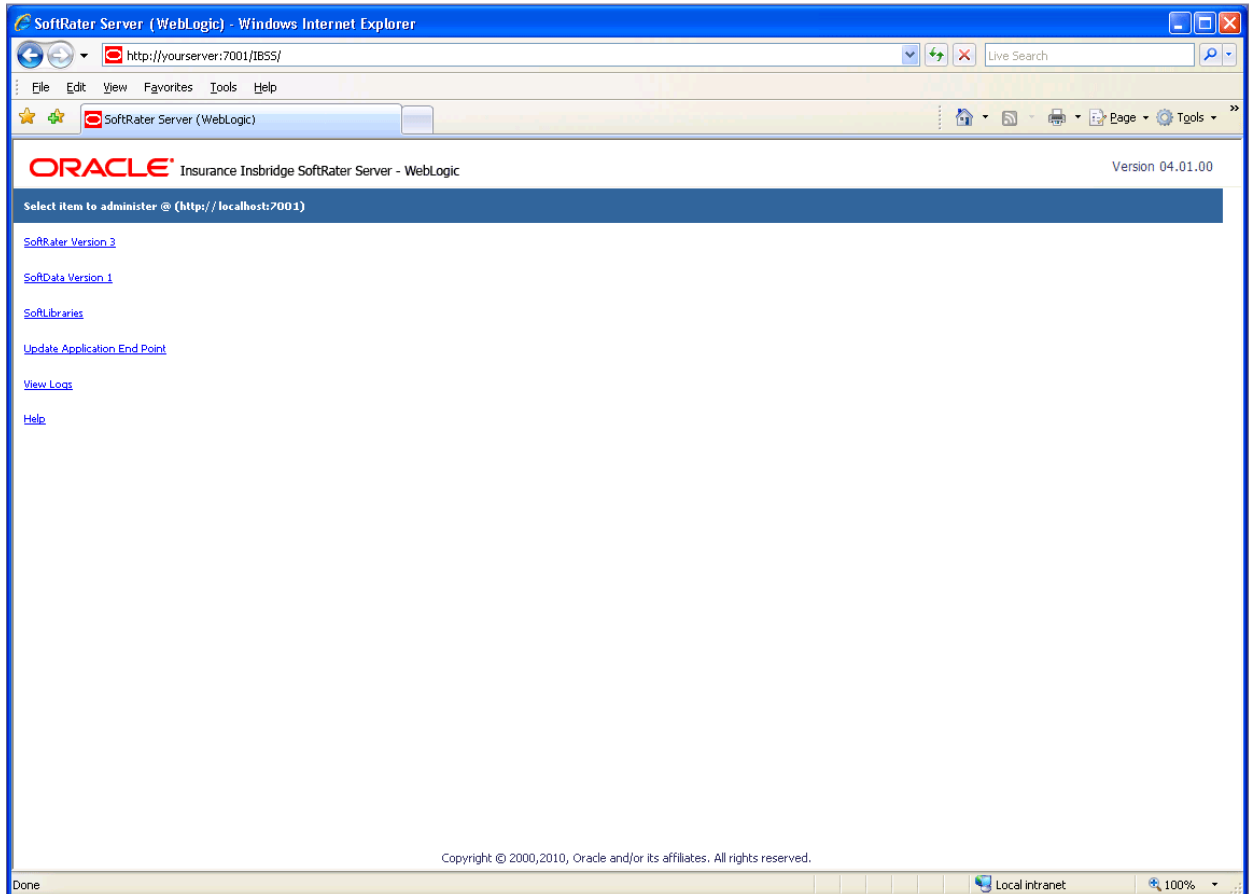


Figure 3 SoftRater Server for WebLogic

---

**NOTE:** The top of the screen will list the platform you are on and the version of IBSS.

---

# INTRODUCTION TO THE SOFTRATER PAGE

The SoftRater page is used to configure and test the SoftRater engine. The SoftRater page is accessed from the IBSS home page by selecting the SoftRater Version 3 link. This page operates the same way for WebLogic, JBoss or WebSphere.



Figure 4 SoftRater Page

Using the menu tree in the left frame, you can choose any of the following:

- **Edit Options:** Sets logging options and the information returned in result XML files.
- **Environment Setup:** Configures rating environments.
- **Reset Environments:** Reloads the SoftRater configuration XML file.
- **Submit Insbridge (xml):** Tests an input file that is in the Insbridge.XML format.
- **Submit Custom (xml):** Tests an input file that is not in the Insbridge.XML format.
- **Program Cache:** Configures cache options and shows a listing of all the programs currently in the cache.
- **Get Version:** Returns the version of the SoftRater engine currently installed.
- **Get Config Path:** Returns the configuration path used by the SoftRater engine.
- **Get Sample Files:** Returns with Sample Files. Shows a listing of the WSDL files.
- **Set WSDL (url):** Changes the default SOAP proxy URL.
- **Get WSDL (url):** Returns the default SOAP proxy URL.
- **Home:** Returns to the SoftRater Home page.

## Edit Options

The Edit Options page is where you can select the information to be automatically logged and the statistical information to be returned in result XML files. To navigate to the **Edit Options** page, select the Edit Options link available from the menu tree on the SoftRater page.

### \* Edit Configuration Settings

Status:

Date Last Modified 12/20/2010 06:01:41 PM

DB Auto Release

Auto Logging  SQL  XML  Program Template

Show Time Stats  Start  Stop  Running

Location Name

Help Server

Logs Dir

Figure 5 Edit Options

### DB Auto Release

A check in this box will enable this feature. If this feature is enabled, the database connections are released as soon as the transaction or request is complete. In the case of a Program to Program (P2P) call, the connection is released as soon as the calling program is finished. If enabled, every time you call the database, a connection will need to be re-opened. This may slow down performance because connections will be opened and closed after each call. You may require this option if you have a limited number of database connections, licensing restrictions, or you are unable to keep connections open.

No check in this box disables this feature. If this feature is disabled, the database connection remains open. You may want keep this feature disabled if you have heavy usage, a large pool of connections, or you are able to keep connections open. Disabling the feature may result in faster performance. However, connections will scale up and down as demand is placed on the DB. If you have a limited number of connections and heavy demand, disabling DB auto release may not give you the performance increase you need. Pool settings can be set by the DB administrator to allow for a larger connection pool. If disabled at the SoftRater level, on most DB servers, there is a setting that can be used.

DB Auto Release is disabled by default.

### Auto Logging

Allows you to select what information should be logged for each transaction. These options should typically be left unchecked, unless directed to check them by a member of the Oracle Insurance Support team.

**SQL:** The SQL script that was executed. If this option is not selected, this information will still be logged if an error occurs.

**XML:** The XML that was used. If this option is not selected, this information will still be logged if an error occurs.

**Program Template:** Provides an XML view of the entire program that was executed. This information is used to help Oracle Insurance determine why a program is not rating correctly.

---

**NOTE:** *SoftLibrary logging is done on the SoftLibraries page.*

---

## Show Time Stats

Allows you to select if and what statistical information will be included in the return XML. Any combination of options may be selected. The statistical information is returned in the <stats> node.

**Start:** Time stamp of when rating started. Returned in the <start\_time> node.

**Stop:** Time stamp of when rating finished. Returned in the <stop\_time> node.

**Running:** 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 Running Time is shown in milliseconds ( $10^{-2}$  seconds).*

---

## Location Name

The name of the server where IBSS is located. The Location Name will be returned as part of the XML response content for each transaction to show the originating site for the result.

## Help Server

Help files are installed with IBFA. Enter the name of the server where IBFA was installed. This will allow users to access the help files when they click on the help link. Leaving this field blank will result in an error when users click the Help link on the home page.

## Logs Dir

Physical directory for storage of the error logs. Enter in the location where you want the log files to be stored. The log directory defaults to the root where the application was installed. This may not be displayed. The logs written to the **Logs Dir** are:

**insbridge.net.SoftRater.general.log:** General status message log.

**insbridge.net.SoftRater.xml.log:** Operational XML that triggered some exception processing.

**insbridge.net.SoftRater.sql.log:** SQL text that has generated some exception processing.

**insbridge.net.SoftServices.lib.log:** SoftRater library that has generated some exception processing.

**Insbridge.net.softrater.cache.log:** The cache log for purges.

When you are finished making changes, click **SAVE**. To cancel changes that have not been saved, click **EXIT**.

## Environment Setup

The **Environment Setup** section allows you to configure rating environments. An environment is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. There is no limit to the number of environments you may have. To navigate to the Environment Setup page, select the Environment Setup link available from the menu tree on the SoftRater page. Required fields will be marked with an asterisk (\*).

- **Creating/Editing an Environment**
- **Testing an Environment**
- **Deleting an Environment**

### \* Environment Setup

Status:

**SELECT ENVIRONMENT** >> Add New Environment <<

Environment Name*	<input type="text" value="SoftRater"/>	Company Id*	<input type="text" value="1010"/>		
Database Server*	<input type="text" value="10.200.10.200"/>	Port*	<input type="text" value="9080"/>	Query Block	<input type="text"/>
Database Name*	<input type="text" value="IBSR"/>	Schema name**	<input type="text"/>		
Database User Id*	<input type="text" value="sa"/>				
Database Password*	<input type="password" value="●●●●●●●●"/>				
Provider Type	<input type="text" value="MS SQL Server"/>				
Database Type	<input type="text" value="SoftRater"/>				
Data Dir	<input type="text"/>				

\* Fields are required.

\*\* Fields required for an Oracle DB connection.

Figure 6 Environment Setup

## To Create/Edit an Environment

1. To create a new environment, use the drop down text box next to **SELECT ENVIRONMENT** and select **>> Add New Environment <<**. If you are editing an existing environment, select the name from the drop down text box. If the page does not automatically refresh, click **GO**.
2. When the page refreshes, enter the following information:

**Environment Name:** A name for the environment.

**Database Server:** The name of the server that houses the database packages are loaded to.

**Database Name:** The name of the database that packages are loaded to.

**Database User Id:** The username to access the database.

**Database Password:** The password for the username entered.

**Provider Type:** The provider of the database. Options are **DB2**, **DB2(AS400)**, **ORACLE** and **MS SQL SERVER**.

**Database Type:** The type of database being accessed. Options are **SoftRater** and **RateManager**.

**Data Dir:** The location of the SoftRater Packages (SRP's).

**Company Id:** Your Company's subscriber ID.

**Port:** Listening port to the target Database Management System.

**Query Block:** (Optional) 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.

**Schema Name:** The schema name for the database.

3. When you are finished entering information, click **SAVE**. The environment will be saved and the **Status** field will update.
4. Before you can use the new or edited environment for rating, you will need to reload the configuration XML file. This is done by resetting the environments.

---

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

---

## To Test an Environment

1. Use the drop down text box next to **SELECT ENVIRONMENT** and select the environment you wish to test. If you are testing a new environment, be sure to save it before testing. If the page does not automatically refresh, click **GO**.



2. When the page refreshes, click **TEST CONNECTION**.
3. You will be asked to confirm testing the environment.
4. Click **OK** to test the environment or **CANCEL** if you do not wish to test the environment.
5. The **Status** field will update with the results of the test.

### To Delete an Environment

1. Use the drop down text box next to **SELECT ENVIRONMENT** to select the environment you wish to delete. If the page does not automatically refresh, click **GO**.
2. When the page refreshes, click **DELETE**.
3. You will be asked to confirm deleting the environment.

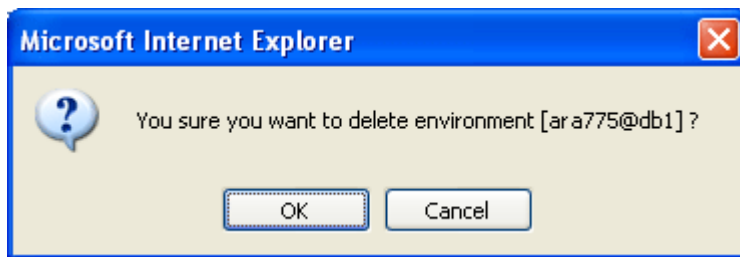


Figure 7 Deleting an Environment

4. Click **OK** to delete the environment or **CANCEL** if you do not wish to delete the environment.
5. The environment will be deleted and the **Status** field will update.
6. The deleted environment will still be available for rating against until the configuration XML file is reloaded. This is done by resetting the environments.

## Reset Environments

To navigate to the **Reset Environments** page, select the Reset Environments link from the menu tree on the SoftRater page. To activate changes to an environment, the SoftRater configuration XML file must be reloaded by clicking **EXECUTE**. The screen will refresh and the environment will be reset. Click **EXIT** to return to the SoftRater Administrator menu.

#### \* Reset Environment Configuration

Select this method to re-load the SoftRater configuration xml file making any changes to the environment settings now active. NOTE: If program caching is enabled the ALL items currently in the cache will be purged.

Note: Transactions currently in process could be made invalid.

Execute

Exit

Figure 8 Resetting the Environment

---

**NOTE:** All information in the cache will be purged and any transactions currently processing could be made invalid.

---

## Submit Insbridge XML

To navigate to the **Submit Insbridge XML** page, select the Submit Insbridge (XML) link available from the menu tree on the SoftRater page. This page allows you to rate an input file that is in the Insbridge.XML format. Select a file to rate, select the environment to rate against and select any optional rate operators to be used during rating.

**\* Submit (xml)**

This page will test InsBridge.XML against loaded SoftRater Packages. You will need to provide an **Input File** or paste a **XML** text to execute. Please enter the required information below.

Input XML

Environment   Indicates the default environment

Add Root  Add the root node to the return result document?

Inputs  Return the input xml used in the request in result document?

Heading  Add the program description information to the results?

Result Desc  Add result mapping item descriptions to the values in result items?

Empty Results  Include result items that are empty to the results?

Debug output  Execute with a debug record of the transaction(s).

Figure 9 Submitting an Insbridge XML

## To Rate a File in the Insbridge.XML Format

1. Browse for an XML file to rate or copy and paste an XML file into the large text box.
2. Select the options to be used while rating the file. For more information on each of these items, see the IBFA topic Optional Rate Operators.

**Environment:** The name of the environment to rate against.

**Add Root:** Select **True** to have the <ibdoc> root node appended to the beginning of the result file. If you are rating a batch file, the root node is needed in order for the resulting file to be valid XML.

**Inputs:** Select **True** to have the input XML file returned in the result file.

**Heading:** Select **True** to have the company\_nm, program\_nm and version\_nm attributes returned in the result file.

**Result Desc:** Select **True** to have the description (d attribute) returned for each result item.

**Empty Results:** Select **True** to have all results returned, even those without a value.

**Debug Output:** Select **True** to return the debug information in the result XML.

3. When you are ready to rate the file, click **EXECUTE**.
4. The file will be rated and the results will be shown in the text area at the bottom of the page.
5. Click **EXIT** to return to the SoftRater Administrator menu.

## Submit Custom XML

To navigate to the **Submit Custom XML** page, select the Submit Custom (XML) link available from the menu tree on the SoftRater page. This page allows you to rate an input file that is not in the Insbridge.XML format. In order to do so, a stylesheet must exist for the program being rated. For more information on creating the stylesheet, see the RateManager topic Introduction to Custom Input and Output Mapping.

**\* Submit Custom (xml)**

This page will test Custom.XML against loaded SoftRater Packages. You will need to provide an **Input File** or paste a **XML** text to execute. Please select the required information below.

---

Environment:

Line of Business:

Company Id:

Program Id:

Program Version:

Result Definition:

Input Mapping?:   Style Name:

Output Mapping?:   Style Name:

Input XML:

---

Figure 10 Submitting a Custom XML

## To Rate a Custom XML File

1. Select the environment to rate against and the program to rate.

**Environment:** The name of the environment to rate against.

**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**.

**Company Id:** Your Company's subscriber ID.

**Program Id:** The program ID for the program you are rating.

**Program Version:** The program version you are rating.

**Result Definition:** The result group to be used for the output. For more information, see the Insbridge SoftRater topic SoftRater Switches.

2. Select the stylesheet to be used to convert the input XML file. You can also select a stylesheet to be used to convert the output XML.

**Input Mapping:** The mapping type to be used to convert the input XML.

- **None:** No mapping will be used.
- **Global:** A global mapping will be used.
- **Program:** A program version specific mapping will be used.
- **Custom:** A custom mapping will be used.

**Style Name:** The name (if any) of the input mapping to use. Global and Custom input mappings must have a mapping program name entered.

**Output Mapping:** The mapping type to be used to convert the output XML.

- **None:** No mapping will be used.
- **Global:** A global mapping will be used.
- **Program:** A program version specific mapping will be used.
- **Custom:** A custom mapping will be used.

**Style Name:** The name (if any) of the output mapping to use. Global and Custom input mappings must have a mapping program name entered.

3. Select the Input XML. Browse for an XML file to rate or copy and paste an XML file into the large text box.
4. Select the options to be used while rating the file. For more information on each of these items, see the IBFA topic Optional Rate Operators.

**Root Node:** Select **Add <IBDOC> Root Node** to have the <ibdoc> root node appended to the beginning of the result file. If you are rating a batch file, the root node is needed in order for the resulting file to be valid XML. To not have the root node appended, select **No Root Added**.

**Inputs:** Select **Add Inputs** to have the input XML file returned in the result file. Select **No Inputs Added** to omit this information.

**Program Name:** Select **Add Program Name** to have the company\_nm, program\_nm and version\_nm attributes returned in the result file. Select **No Program Name** to omit this information.

**Result Desc:** Select **Add Result Desc** to have the description (d attribute) returned for each result item. To omit this attribute, select **No Result Desc**.

**Empty Results:** Select **Add Empty Results** to have all results returned, even those without a value. Select **No Empty Results** to omit empty results.

**Debug Output:** Select **Debug** to return the debug information in the result XML. Select **No Debug** to omit this information.

**Result Encoding:** Select **Add Empty Results** to have all results returned, even those without a value. Select **No Empty Results** to omit empty results.

**Cache:** Select **Run w/ Cache** to allow the cache to be used while rating (if the cache is enabled). Select **Disable Cache** to rate the file without using the cache.

5. When you are ready to rate the file, click **EXECUTE**.
6. The file will be rated and the results will be shown in the text area at the bottom of the page.
7. Click **EXIT** to return to the SoftRater Administrator menu.

## Program Cache

To navigate to the **Program Cache** page, select the Program Cache link available from the menu tree on the SoftRater page. This page allows you to configure cache options, as well as view a listing of all the programs currently in the cache. You also can remove a specific program from the cache or clear the entire cache. For more information on the cache, see the SoftRater topic Introduction to SoftRater Caching.

\* Program Cache Options

Status:

---

Date Last Modified 12/20/2010 06:43:04 PM

Enable Caching

---

Save Exit

Program Listing:

Remove!	Name	Env Source	Total Bytes	Total Hit Rows	Total Miss Rows	Package Creation Date	Cached Enabled Date
Empty							

Refresh Clear All

Figure 11 Program Cache

## Configuring Cache Options

These settings apply to all environments used by SoftRater engine. After making a change, be sure to click **SAVE**.

**Enable Caching:** 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.

Click **EXIT** to return to the SoftRater Administrator menu.

## Removing a Program from the Cache

To remove a specific program from the cache, use the **Remove** hyperlink next to the desired program. All information for that program (in the specific environment) will be removed from the cache. If information exists in the cache for the same program in different environments, removing the information from one environment does not remove it from the other environments.

If no programs are available for removal, the Remove hyperlink will not be displayed.

## Clearing the Cache

To remove all information from the cache, click **CLEAR ALL**. All information will be removed from the cache.

## Get Version

To navigate to the **Get Version** page, select the Get Version link available from the menu tree on the SoftRater page.

This option returns the version of the SoftRater engine currently installed.

To use, click **EXECUTE**. The version will be returned in the text area at the bottom of the screen.

### \* Get version information

Select this method to get version of the SoftRater Engine currently in use.

---

Execute

---

Exit

Figure 12 Get Version

Click **EXIT** to return to the SoftRater Administrator menu.

## Get Config Path

To navigate to the **Get Config Path** page, select the Get Config Path link available from the menu tree on the SoftRater page.

This method is used to return the configuration path used by the SoftRater engine.

To use, click **EXECUTE**. The configuration path will be returned in the text area at the bottom of the screen. The `insbridge.net.softraterconfig.xml` file must be in this location in order for the SoftRater engine to function.

### \* Get install config path

Select this method to get default configuration path being used by the SoftRater Engine. The `[insbridge.net.softraterconfig.xml]` configuration file must be in this directory for the engine to operate.

---

Execute

---

Exit

Figure 13 Get Config Path

Click **EXIT** to return to the SoftRater Administrator menu.

## Get Sample Files

To navigate to the **Get Sample Files** page, select the Get Sample Files link available from the menu tree on the SoftRater page. WebSphere will return different menu options than WebLogic or JBoss.

### WebSphere

This page allows you to view the WSDL (Web Service Definition Language) files used by the SoftRater for WebSphere engine, as well as the SoftRaterProxy.txt file.

To use, click the button for the file you wish to view. The file will be returned in the text area at the bottom of the screen.

Available Files:

- **SoftRater.wsdl**
- **SoftRaterProxy.txt**

Insurance Insbridge SoftRater Server - WebSphere

\* Get SoftRater WSDL Files

Select the WSDL file to view.

SoftRater.wsdl

SoftRaterProxy.txt

Exit

Figure 14 Get Sample Files WebSphere

### WebLogic and JBoss

This page allows you to view the WSDL (Web Service Definition Language) files used by the SoftRater for WebLogic or SoftRater for JBoss engine, as well as the SoftRaterProxy.txt file.

To use, click the button for the file you wish to view. The file will be returned in the text area at the bottom of the screen.

Available Files:

- **SoftRaterWSService.wsdl**
- **SoftRaterProxy.txt**

### Insurance Insnbridge SoftRater Server - WebLogic

#### \* Get SoftRater WSDL Files

Select the WSDL file to view.

SoftRaterWSService.wsdl

SoftRaterProxy.txt

Exit

Figure 15 Get Sample Files WebLogic and JBoss

Click **EXIT** to return to the SoftRater Administrator menu.

## Set WSDL URL

The **Set WSDL URL** will set the SOAP end point. Select the Set WSDL URL link from the menu tree on the SoftRater page. This method changes the default SOAP proxy URL. To use, enter the new URL in the text box and click **EXECUTE**. The new URL will be set and a confirmation will be returned in the text area at the bottom of the screen.

#### \* Set SOAP end point

Select this method to change the default SOAP proxy URL.

url:

Execute

Exit

Figure 16 Set SOAP End Point

If you wish to determine the SOAP URL, use the Get WSDL URL method. Click **EXIT** to return to the SoftRater Administrator menu.



## Get WSDL URL

The **Get WSDL URL** will get the SOAP end point. Select the Get WSDL URL link from the menu tree on the SoftRater page. This method returns the default SOAP proxy URL. To use, click **EXECUTE**. The URL will be returned in the text area at the bottom of the screen.

### \* Get SOAP end point

Select this method to get the default SOAP proxy URL.

---

Execute

---

Exit

*Figure 17 Get SOAP End Point*

If you wish to change the SOAP URL, use the Set WSDL URL method. Click **EXIT** to return to the SoftRater Administrator menu.

# INTRODUCTION TO THE SOFTDATA PAGE

The SoftData page is used to test the SoftData engine. The SoftData page is accessed from the IBSS home page by selecting the SoftData Version 1 link.

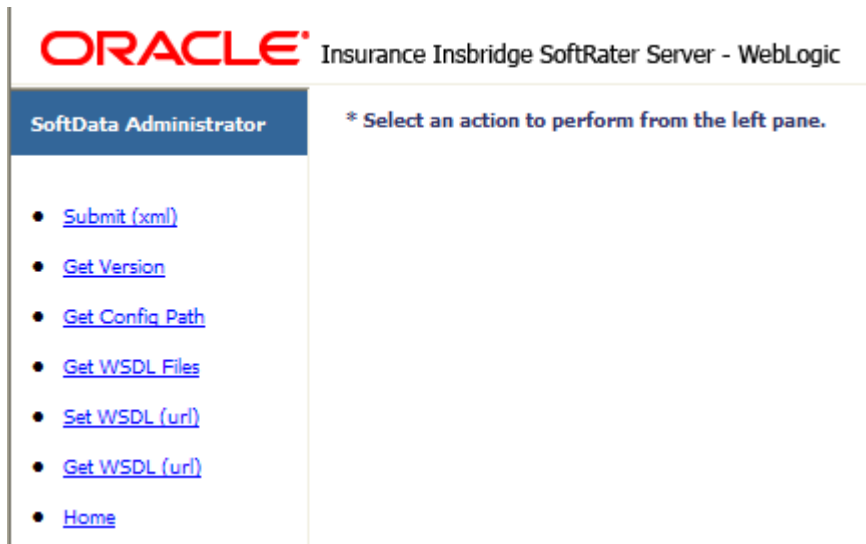


Figure 18 SoftData Page

Using the menu tree in the left frame, you can choose any of the following:

- **Submit (xml):** Tests a SoftData input file.
- **Get Version:** Returns the version of the SoftData engine currently installed.
- **Get Config Path:** Returns the configuration path used by the SoftData engine.
- **Get WSDL Files:** Shows a listing of the WSDL files and allows you to view them.
- **Set WSDL (url):** Changes the default SOAP proxy URL.
- **Get WSDL (url):** Returns the default SOAP proxy URL.
- **Home:** Returns to the home page.

## Submit XML

To navigate to the **Submit XML** page, select the Submit (xml) link available from the menu tree on the SoftData page. This page allows you to test a SoftData request file that is in the InsbridgeDataRequest.XML format. You can select the file and environment to use for the request.

See the following topics for more information on SoftData:

- **InsbridgeDataRequest.XML:** The format where requests are sent in to SoftData.
- **InsbridgeDataResult.XML:** The format where results are received from SoftData.

**\* Submit (xml)**

This page will test InsBridge Data Request.XML against loaded SoftRater Packages. You will need to provide an **Input File** or paste a **XML** text to execute. Please enter the required information below.

Input XML

Environments   [ ] Indicates the default environment

Figure 19 Testing a SoftData Request File

## To Test a File in the InsbridgeDataRequest.XML Format

1. Browse for an XML file to use or copy and paste an XML file into the large text box.
2. Select the environment to be used for the request.
3. When you are ready to test the file, click **EXECUTE**.
4. The file will be rated and the results will be shown in the text area at the bottom of the page.

## Get Version

To navigate to the **Get Version** page, select the Get Version link available from the menu tree on the SoftData page. This option returns the version of the SoftData engine currently installed.

To use, click **EXECUTE**. The version will be returned in the text area at the bottom of the screen.

**\* Get version information**

Select this method to get version of the SoftRater Engine curenly in use.

Figure 20 Get Version

## Get Config Path

To navigate to the **Get Config Path** page, select the Get Config Path link available from the menu tree on the SoftData page. This option is used to return the configuration path used by the SoftRater engine.

To use, click **EXECUTE**. The configuration path will be returned in the text area at the bottom of the screen. The `insbridge.net.softraterconfig.xml` file must be in this location in order for the SoftRater engine to function.

\* Get install config path

Select this method to get default configuration path being used by the SoftRater Engine. The `[insbridge.net.softraterconfig.xml]` configuration file must be in this directory for the engine to operate.

Execute

Figure 21 Get Config Path

## Get WSDL Files

To navigate to the **Get WSDL Files** page, select the Get WSDL Files link available from the menu tree on the SoftData page. WebSphere will return different menu options than WebLogic or JBoss.

### WebSphere

This page allows you to view the WSDL (Web Service Definition Language) files used by the SoftData WebSphere engine, as well as the `SoftDataProxy.txt` file.

To use, click the button for the file you wish to view. The file will be returned in the text area at the bottom of the screen.

Available Files:

- **SoftData.wsdl**
- **SoftDataProxy.txt**

Insurance Insbridge SoftRater Server - WebSphere

\* Get SoftRater WSDL Files

Select the WSDL file to view.

SoftData.wsdl

SoftDataProxy.txt

Figure 22 Get WSDL Files WebSphere

## WebLogic or JBoss

This page allows you to view the WSDL (Web Service Definition Language) files used by the SoftData WebLogic engine, as well as the SoftDataProxy.txt file.

To use, click the button for the file you wish to view. The file will be returned in the text area at the bottom of the screen.

Available Files:

- **SoftDataWSService.wsdl**
- **SoftDataProxy.txt**

### Insurance Insbridge SoftRater Server - JBOSS

#### \* Get SoftRater WSDL Files

Select the WSDL file to view.

SoftDataWSService.wsdl

SoftDataProxy.txt

Figure 23 Get WSDL Files WebLogic and JBoss

## Set WSDL URL

The **Set WSDL URL** will set the SOAP end point. Select the Set WSDL URL link from the menu tree on the SoftData page. This method changes the default SOAP proxy URL.

To use, enter the new URL in the text box and click **EXECUTE**. The new URL will be set and a confirmation will be returned in the text area at the bottom of the screen.

#### \* Set SOAP end point

Select this method to change the default SOAP proxy URL.

url:

Execute

Figure 24 Set SOAP End Point

If you wish to determine the SOAP URL, use the Get WSDL URL method.

## Get WSDL URL

The **Get WSDL URL** will get the SOAP end point. Select the Get WSDL URL link from the menu tree on the SoftData page. This method returns the default SOAP proxy URL.

To use, click **EXECUTE**. The URL will be returned in the text area at the bottom of the screen.

### \* Get SOAP end point

Select this method to get the default SOAP proxy URL.

---

Execute

*Figure 25 Get SOAP URL*

If you wish to change the SOAP URL, use the Set WSDL URL method.

# INTRODUCTION TO THE SOFTLIBRARIES PAGE

The SoftLibraries page is used to administer the SoftLibraries. You can access the SoftLibraries page by clicking the SoftLibraries link on the IBSS main page.

The SoftLibraries section of IBSS allows an administrator to add, edit or delete external libraries. SoftLibraries can be created by developers and stored remotely. After being added into IBSS, these SoftLibraries can be added and activated in IBFA. Only active SoftLibraries can be used by callout programs in RateManager.

Please verify the version of IBFA you are using. In order to add a WebLogic SoftLibrary, you must be using IBFA for IBRU Version 3.9 or later. To add a JBoss SoftLibrary, you must be using IBFA for IBRU Version 3.11 or later.

In SoftLibraries you can:

- **Add Libraries**
- **Edit Libraries**
- **Delete Libraries**
- **View implementation requirements**
- **Reset configurations**

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.

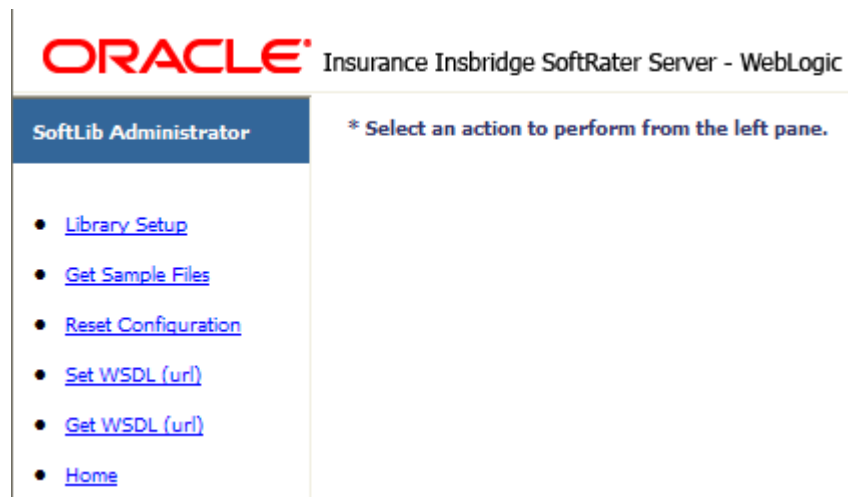


Figure 26 SoftLibraries Main Menu

The SoftLibraries page has six options:

- **Library Setup:** Allows for the adding, editing and deleting of SoftLibraries.
- **Get Sample Files:** Displays the require implementation configuration.
- **Reset Configuration:** Resets the configuration.
- **Set WSDL (url):** Changes the default SOAP proxy URL.
- **Get WSDL (url):** Returns the default SOAP proxy URL.
- **Home:** Returns you back to the IBSS main page.

## Library Setup

Library setup is where you will manage Java SoftLibraries in IBSS.

\* Library Add/Edit

Status:

---

Date Last Modified: 07/07/2009 12:37:18 PM

Admin Name:

Class Name:

Logging:

Status:

---

Libraries Listing

Active	Edit	Admin Name	Class Name	Logging	Date Last Modified	Delete
Active	<a href="#">Edit</a>	Lib	com.insbridge.samples.Library	On	05/02/2009 03:53:40 PM	<a href="#">Delete</a>
Disabled	<a href="#">Edit</a>	Lib 1	com.insbridge.samples.Library_1	Off	05/07/2009 06:38:14 PM	<a href="#">Delete</a>
Disabled	<a href="#">Edit</a>	Lib 2	com.insbridge.samples.Library_2	Off	05/07/2009 06:37:58 PM	<a href="#">Delete</a>
Disabled	<a href="#">Edit</a>	VM1	com.insbridge.samples.Library_6	Off	05/16/2009 11:00:53 AM	<a href="#">Delete</a>
Active	<a href="#">Edit</a>	Mary-1	Doc	Off	01/23/2009 12:08:28 PM	<a href="#">Delete</a>

Figure 27 SoftLibraries Main Screen

### Library Add/Edit Navigation

**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 lower section of the SoftLibraries page. Admin names must be unique.

**Class Name:** This is the name of the actual SoftLibrary created by the developer from the program where it was created. This information can be obtained from the developer. Class names must be unique.

**Logging:** Check this box if you want logging for this program. Leave it blank for no logging. The default is for no 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 disabled.

### Buttons

There are three buttons located in the Library Add/Edit section.

– Saves your work when you edit.

– Adds a new library.

– Returns you to the SoftLibrary Administrator screen.

When editing an active SoftLibrary, two links will be displayed in the Library Add/Edit area. These links will not be displayed if the SoftLibrary selected for editing is disabled.



[Edit Arguments!](#) – Allows you to edit the arguments of the SoftLibrary.

[Test!](#) – Tests your SoftLibrary.

## Libraries Listing Navigation

Much of the same information gathered in the Library Add/Edit section will be displayed here plus the date of the last modification. Status will be listed under Active. You also will have options to edit or delete individual SoftLibraries.

– Refreshes the SoftLibrary listing.

– Delete All will delete all SoftLibraries. Any SoftLibrary can be deleted 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.

## Adding a SoftLibrary

A SoftLibrary can be added at any time.

---

**NOTE:** *For the first part of adding a SoftLibrary, you must have access to the application server where IBSS is located.*

---

1. Have your Java class library ready as a .JAR file.
2. On the application server where IBSS is located, stop the app server.
3. Place the .JAR file in the lib location designated by application:
  - a. **WebLogic:** Place the .JAR file in the  
/\$WL\_Home/user\_projects/domains/YOUR\_DOMAIN/lib.
  - b. **WebSphere:** Place the .JAR file in the WebSphere install directory  
/\$WS\_Home/AppServer/lib.
  - c. **JBoss:** Place the .JAR file in the JBoss install directory  
/\$JB\_Home/server/SR\_Server/lib.

Where\$\_Home is the relative path to the app server installation location.

4. Restart the app server.

---

**NOTE:** *To enter a library in IBSS, you must have the Class Name.*

---

5. In IBSS, on the Library Setup screen enter in the **SoftLibrary** information. Admin Name and Class name are required.
6. Click **SAVE** to add your SoftLibrary. It will be displayed on the lower portion of the screen.

If there are any errors with the new SoftLibrary, a message will be displayed at the top of the screen explaining the conflict.

SoftLibraries entered in IBSS will not be displayed in RateManager until added and activated in IBFA. You will need to have the Admin Name, Class Name and Endpoint in order to add the SoftLibrary in IBFA.

## Editing a SoftLibrary

Any SoftLibrary can be edited at any time. Be aware that changes to a SoftLibrary in IBSS may not be automatically carried over to IBFA. If you edit the Admin Name or Class Name, you will have to edit the same information in IBFA. You also could delete the SoftLibrary in IBFA and then re-add it. Be aware that changes to a SoftLibrary here will affect any programs in RateManager that currently call this SoftLibrary without sending notice to users.

1. In the Library Listing section, click the [Edit](#) link on the SoftLibrary you want to edit. The SoftLibrary information will be populated in the top of the screen.
2. Make your changes and click **SAVE** to save the SoftLibrary. At the top of the page, the status will reflect that your configuration has been updated.

\* Library Add/Edit

Status:

---

Date Last Modified: 07/07/2009 12:37:18 PM

Admin Name:

Class Name:

Logging:  [Edit Arguments!](#) [Test!](#)

Status:

---

**Libraries Listing**

Active	Edit	Admin Name	Class Name	Logging	Date Last Modified	Delete
Active	<a href="#">Edit</a>	Lib	com.insbridge.samples.Library	On	05/02/2009 03:53:40 PM	<a href="#">Delete</a>
Disabled	<a href="#">Edit</a>	Lib 1	com.insbridge.samples.Library_1	Off	05/07/2009 06:38:14 PM	<a href="#">Delete</a>
Disabled	<a href="#">Edit</a>	Lib 2	com.insbridge.samples.Library_2	Off	05/07/2009 06:37:58 PM	<a href="#">Delete</a>
Disabled	<a href="#">Edit</a>	VM1	com.insbridge.samples.Library_6	Off	05/16/2009 11:00:53 AM	<a href="#">Delete</a>
Active	<a href="#">Edit</a>	Mary-1	Doc	Off	01/23/2009 12:08:28 PM	<a href="#">Delete</a>

Figure 28 Editing a SoftLibrary

## Deleting a SoftLibrary

Any SoftLibrary can be deleted 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. SoftLibraries will also have to be deleted out of IBFA.

To delete a SoftLibrary, click the [Delete](#) link on the library you want to delete. A warning message will be displayed, click **OK** to remove the SoftLibrary. Click **CANCEL** to return to the SoftLibrary screen.

## Editing Arguments

When you edit a SoftLibrary, you will have the option to edit the SoftLibrary arguments.

To edit arguments, click the [Edit Arguments!](#) link. The lower portion of the screen will change to the current arguments.

---

**\* Library Add/Edit**

Status:

---

Date Last Modified: 05/02/2008 03:53:40 PM

Admin Name

Class Name

Logging  [Edit Arguments!](#) [Test!](#)

Status  ▼

---

---

**(Lib) Setup Values**

Status:

---

Setup Values	<input type="button" value="Delete All"/>
<input type="text" value="----- Select Add -----"/> <input type="text" value="FACTOR"/>	<input type="button" value="Delete"/>
	<input type="button" value="Update"/>
	<input type="button" value="Add"/>
Name: <input type="text"/>	<input type="button" value="Done"/>
Value: <input type="text"/>	

Figure 29 Editing Arguments

In this area you can

**Delete All:** Removes all arguments.

**Delete:** Highlight the argument you no longer need and click **DELETE** to remove this argument.

**Update:** After making edits, click **UPDATE** to refresh the screen with the current arguments.

**Add:** To add a new argument, enter in a **Name** and a **Value**. Click **ADD**. The argument will be displayed in the setup values box.

**Done:** Closes the screen.

## Testing an Argument

After you have edited a SoftLibrary, you can test it.

To test a SoftLibrary, click the [Test!](#) link. The lower portion of the screen will change.

---

**\* Library Add/Edit**

Status:

---

Date Last Modified: 05/02/2008 03:53:40 PM

Admin Name

Class Name

Logging  [Edit Arguments!](#) [Test!](#)

Status

---

---

**\* Submit Test (xml)**

This page will test user defined XML messages against configured **SoftLibrarie**. You can select an **Input File** or just pasted your **XML** to execute.

---

Action

Sample-XML

Execution Time:

---

Figure 30 Testing a SoftLibrary

In this area you can:

**Action:** Select the action you want to take from the drop down menu.

**Execute** – Executes the SoftLibrary.

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

**GetResponseXML** – 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.

**GetLogXML** – If logging is turned on, this screen will display logs.

**AppendtoLogXML** – Appends the logs.

**GetHelpText** – This is an information screen. If you want a quick view of the library, this screen contains the basic information.

**GetArgs** – Returns the arguments used in the SoftLibrary.

**Sample-XML:** You can search for sample XML to run. You can directly enter XML in the box underneath the.

**Execute:** After you have made your selection and entered any necessary XML, click **Execute!** to run.

**Done:** Closes the screen.

## Get Sample Files

The following is a sample of the abstract interface required by your class to be registered as a SoftLibrary.

```
abstract public interface ISoftService
{
    public String Execute(String XMLDoc) throws Exception;
    public String GetRequestXml() throws Exception;
    public String GetResponseXml() throws Exception;
    public void Initialize(String XMLDoc) throws Exception;
    public String Ping() throws Exception;
    public String GetLogXml() throws Exception;
    public void AppendToLogXml(String XMLDoc) throws Exception;
    public String GetHelpText() throws Exception;
    public String GetVersion() throws Exception;
}
```

### Inbridge SoftLibrary Required Interface for Native JAVA

All that is required to create a JAVA class from this interface and register the new library for use in a RateManager program. SoftLibrary call-out registration is covered in the IBRU setup documentation. SoftLibrary definition is based on a stateless call-out paradigm.

- Execute() o Main entry point for business / rule transaction
- GetRequestXml() o Sample input XML document definition required by the library module
- GetResponseXml() o Sample output XML document definition return by the library module
- Initialize() o Setup arguments are provided to module just prior to the system calling the "Execute" method
  - Sample initialize xml :
  - <arguments>
  - <arg n="My value" v="123abc">
  - <arg n="URL" v="myserver.com">
  - </arguments>
- Ping() o Smoke test method in which library just verify it's properly setup
- GetLogXml() o Library returns a XML document definition of any optionally logged data
- AppendToLogXml() o Allow system to submit data for optionally logging by the library
- GetHelpText() o Display summary/help/version information displayed during registration

Figure 31 Get Sample Files

Clicking the [Get Sample Files](#) link pulls up a separate window that contains the implementation interfaces required by SoftLibraries. This window can be left open while you work.

## Reset Config

After the first run, the environment is cached. To clear the cache, click the [Reset Configuration](#) link.



Figure 32 Reset Configuration

## Set WSDL URL

The **Set WSDL URL** will set the SOAP end point. This method changes the default SOAP proxy URL.

To use, enter the new URL in the text box and click **EXECUTE**. The new URL will be set and a confirmation will be returned in the text area at the bottom of the screen.

### \* Set SOAP end point

Select this method to change the default SOAP proxy URL.

url:

Figure 33 Set SOAP URL

If you wish to determine the SOAP URL, use the Get WSDL URL method.

## Get WSDL URL

The **Get WSDL URL** will get the SOAP end point. This method returns the default SOAP proxy URL.

To use, click **EXECUTE**. The URL will be returned in the text area at the bottom of the screen.

### \* Get SOAP end point

Select this method to get the default SOAP proxy URL.

---

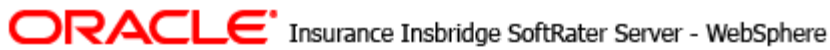
Execute

*Figure 34 Get SOAP End Point*

If you wish to change the SOAP URL, use the Set WSDL URL link.

## UPDATE SOAP SERVICES CONFIGURATION PAGE

The following settings do not need to be changed unless directed otherwise by an experienced WebSphere administrator. These settings should only change if using WebSphere ND or if the standard WebSphere installation configuration was modified to suit your environment.



### Edit SOAP Deployment Configuration Settings

Status: Select the Web Services fields to update.

#### SoftRater EJB

JNDIName	<input type="text" value="ejb/com/insbridge/sofrater/SoftRaterHome"/>
ContextProviderURL	<input type="text" value="iiop://localhost:28090"/>
FullHomeInterfaceName	<input type="text" value="com.insbridge.softater.SoftRaterHome"/>
FullContextFactoryName	<input type="text" value="com.ibm.websphere.naming.WsnInitialContextFactory"/>

#### SoftData EJB

JNDIName	<input type="text" value="ejb/com/insbridge/softdata/SoftDataHome"/>
ContextProviderURL	<input type="text" value="iiop://localhost:28090"/>
FullHomeInterfaceName	<input type="text" value="com.insbridge.softdata.SoftDataHome"/>
FullContextFactoryName	<input type="text" value="com.ibm.websphere.naming.WsnInitialContextFactory"/>

#### SoftServices Gateway EJB

JNDIName	<input type="text"/>
ContextProviderURL	<input type="text"/>
FullHomeInterfaceName	<input type="text"/>
FullContextFactoryName	<input type="text"/>

Figure 35 SOAP Services Configuration Page



---

**WARNING:** *If these settings are different from the default WebSphere installation, then you must contact your WebSphere support personnel to provide these settings to you.*

---

In a WebSphere ND/Load balanced environment, the **JNDIName** on each cluster node will need to be modified from the standard shown above, to a format similar to:  
cell/clusters/CLUSTERNAME/ejb/com/insbridge/Insbridge SoftRater/SoftRaterHome, where  
CLUSTERNAME is the name of your cluster.

A useful tool for discovering the JNDI Namespaces is available in the \$WSAS\_HOME\bin folder called  
dumpNameSpace.sh or dumpNameSpace.bat. The utility can be run without any command line  
arguments to retrieve all the available JNDI name spaces.

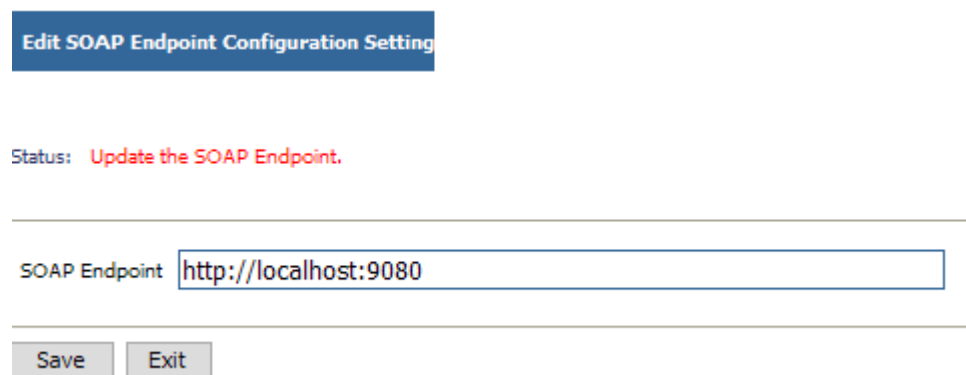
This option will not be displayed for WebLogic or JBoss.

## UPDATE APPLICATION ENDPOINT CONFIGURATION PAGE

Configuration location for changing from the default SOAP endpoint to a custom setting as dictated by a custom configuration. No changes are required unless specified by an administrator.

WebSphere uses a different port than WebLogic and JBoss.

### WebSphere



Edit SOAP Endpoint Configuration Setting

Status: Update the SOAP Endpoint.

SOAP Endpoint

Save Exit

Figure 36 SOAP Endpoint Configuration Page for WebSphere

---

**WARNING:** *If these settings are different from the default WebSphere installation, then you must contact your WebSphere support personnel to provide these settings to you.*

---

### WebLogic and JBoss

The configuration method will be the same. WebLogic will use port 7001 and JBoss will use port 8080.

# VIEW LOGS

The Log page shows a listing of the logs available. By default, information is only logged when an error occurs. This can be changed from the Insbridge SoftRater - Edit Options page. To view a log, click the hyperlink. The log will be returned in the text area at the bottom of the screen.

To clear a log, click the [\[Clear!\]](#) link at the end of the row. No warning message will be displayed. Logs are cleared immediately.

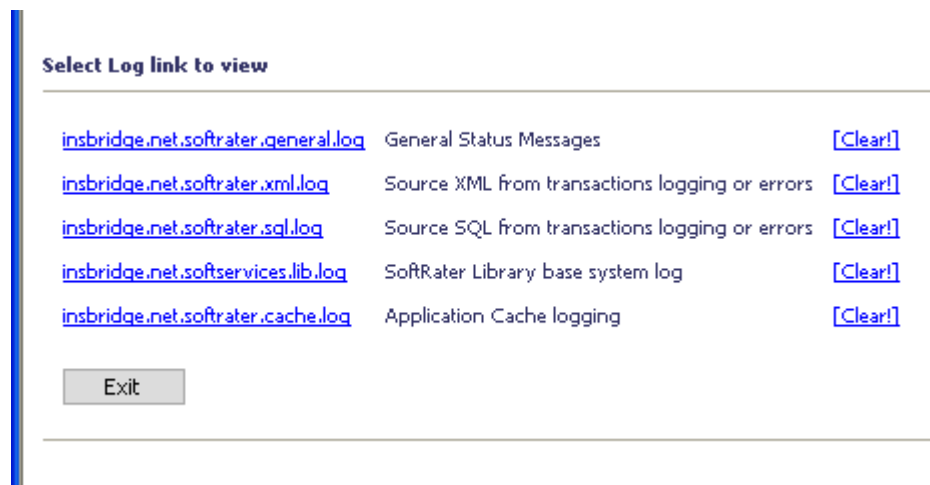


Figure 37 Logs Page

The logs available are:

- **insbridge.net.softmater.general.log:** Shows general status messages.
- **insbridge.net.softmater.xml.log:** Shows the source XML for transactions.
- **insbridge.net.softmater.sql.log:** Shows the source SQL for transactions.
- **Insbridge.net.softservices.lib.log:** Shows the SoftLibrary logs.
- **Insbridge.net.softmater.cache.log:** Shows the cache log.

---

**NOTE:** *Library logging is done on the SoftLibraries page. Logging is on a per program basis. To get library logs, you must go into each program and turn logging on.*

---

If logging has not been turned on, no logs will be displaced. To turn on logging for general, SQL or XML, please go to the SoftRater Administration page.

## CONTACTING SUPPORT

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

### Address any additional inquiries to:

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

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200  
[oracle.com](http://oracle.com)

## TTY ACCESS TO ORACLE SUPPORT SERVICES

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

## 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 release and the 4.0 release of SoftRater for Java engines.

## GLOSSARY TERMS

<b>A</b>	
<b>Administrator:</b>	The person designated by your company who has the authority to create and change groups, usernames, passwords and restrictions.
<b>Algorithm:</b>	A sequence of steps used to perform a calculation.
<b>Assigned Driver:</b>	A driver who has been assigned to a vehicle.
<b>Assigned Vehicle:</b>	A vehicle that has been assigned a driver.
<b>Authoring Environment</b>	The physical machine where RateManager is installed.
<b>C</b>	
<b>Calculated Variable:</b>	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.
<b>Callouts</b>	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.
<b>Category:</b>	A user defined group of information that defines inputs, variables, algorithms and the overall structure of the program.
<b>Criteria:</b>	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.
<b>D</b>	
<b>Data Type:</b>	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.
<b>Date:</b>	A data type supported for inputs and result variables only. For more information, see Dates in the Contents section.
<b>Decimal:</b>	A data type supported for all types of variables and inputs. Examples of decimal values are 3.1415, 18 and 0.995.
<b>Default Value:</b>	Used by a mapped variable if no match is found based on the criteria.
<b>Dependency:</b>	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.
<b>Driver Assignment:</b>	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.
<b>Driver Assignment Scenario:</b>	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.
<b>E</b>	
<b>Export:</b>	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.
<b>F</b>	
<b>Flag:</b>	A variable that holds a 1 for true and a 0 for false.
<b>Flag Driver Algorithm:</b>	An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.
<b>Flag Driver Function:</b>	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.
<b>Flag Vehicle Algorithm:</b>	An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.
<b>Flag Vehicle Function:</b>	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.
<b>G</b>	
<b>Global:</b>	An input or variable that is available to all programs under a specific subline.
<b>Global Input:</b>	A value that is passed into the rating system.
<b>Global Result:</b>	A value that is passed out of the system after rating.
<b>Group:</b>	A set of users that have the same access rights.
<b>I</b>	
<b>IBFA</b>	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.
<b>IBSS</b>	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.
<b>IBRU</b>	Insbridge Rating and Underwriting System. This is the entire system.
<b>If:</b>	A step type available for use in calculated variables and algorithms. For more information, see If in the contents section.
<b>Import:</b>	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.
<b>Input:</b>	A value that is passed into the rating system.
<b>Integer:</b>	A data type supported for all types of variables and inputs. Examples of integer values are 3, 1859865 and -47.
<b>Interpolation:</b>	An estimated value derived from two known values.
<b>L</b>	
<b>Library:</b>	The Library is where templates are stored and managed.

<b>Linked Variables:</b>	Two or more mapped variables that have been associated with one another because they use the same criteria.
<b>Lock:</b>	A lock will close all associated Variables, Algorithms, Driver Assignments, Sequencing and Result Mappings in a program version from deletions and edits.
<b>Logical Environment</b>	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.
<b>M</b>	
<b>Mapped Variable:</b>	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.
<b>Mask:</b>	A feature that allows the customer to determine how data should be interpreted. See Masking in the Contents section for more information.
<b>N</b>	
<b>Normal Rating Algorithm:</b>	The most common type of algorithm. Examples of what it can be used for are: <ul style="list-style-type: none"> <li>• Determine premiums</li> <li>• Calculate differences in limits being passed into the system vs. limits being rated by the system</li> <li>• Assign tiers</li> </ul>
<b>O</b>	
<b>Operator:</b>	A built-in mathematical function used in calculations and comparisons.
<b>P</b>	
<b>Package:</b>	A small file that holds all the RateManager logic for a specific program and version.
<b>Package Location</b>	A pointer to a location where SoftRater Packages (SRP's) are stored.
<b>Physical Environment</b>	A physical environment is generally referred to as a physical machine.
<b>Program:</b>	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.
<b>Program Date Mask:</b>	Specifies how SoftRater interprets dates being passed into an input file.
<b>Program Folders:</b>	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.
<b>R</b>	
<b>Rank Driver Algorithm:</b>	An algorithm used by a Rank Driver Function to rate drivers based on certain criteria.
<b>Rank Driver Function:</b>	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.
<b>Rank Vehicle Algorithm:</b>	An algorithm used by a Rank Vehicle Function to rate vehicles based on certain criteria.
<b>Rank Vehicle Function:</b>	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.
<b>Rating Environment</b>	The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
<b>Reconcile</b>	A comparison feature that compares one program version against another version in the same program and generate a report of the differences.
<b>Restrictions:</b>	Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator.
<b>Result Mapping:</b>	A defined set of results, inputs and variables displayed in the output file.
<b>Revision:</b>	A variable specific type of versioning. See Versioning in the Contents section for more information.
<b>RM</b>	RateManager. RateManager is a component within IBRU that enables users to manage the product definition and modification process, including rating and underwriting logic.
<b>S</b>	
<b>Sequence:</b>	The order in which algorithms run. See Sequencing in the Contents section for more information.
<b>SoftLibrary:</b>	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
<b>SoftRater Node</b>	A SoftRater node is either an IBFA (without RateManager) or IBSS instance on a physical environment.
<b>Source:</b>	The source is the creator of a template and will also be the name of the new subline.
<b>SR</b>	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.
<b>SRP</b>	SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.
<b>SR-JAVA</b>	SoftRater for Java. This is also another name for IBSS.
<b>SR-WIN</b>	– SoftRater for Windows. This is also another name for IBFA.
<b>String:</b>	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".
<b>Subline:</b>	Sublines are classifications that fall in between lines of business and program folders. Sublines allow for the separation of programs by source.
<b>T</b>	
<b>Tab-delimited:</b>	A type of text file in which columns are separated by tabs. This is the required format for importing tables into RateManager.
<b>Template:</b>	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.
<b>U</b>	
<b>Unassigned Driver:</b>	A driver who has not been assigned to a vehicle.
<b>Unassigned Vehicle:</b>	A vehicle that has not been assigned a driver.
<b>Underwriting Algorithm:</b>	A type of algorithm used to determine if a policy meets the requirements of the company.

<b>V</b>	
<b>Variable:</b>	A name used to represent a value that can change. See Variables in the Contents section for more information.
<b>Version:</b>	One of a sequence of copies of a program, each incorporating new modifications. See Versioning in the Contents section for more information.
<b>VFS</b>	Virtual File Servers. Virtual file server management allows you to set up servers that are in different locations where packages can be downloaded.
<b>W</b>	
<b>Wildcard:</b>	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.
<b>Workflow:</b>	A collection of programs from all lines of business combined with result group mappings and assigned to execute in sequence that returns a single or multiple results.
<b>Working Category:</b>	A classification used to define how elements should run. See Categories in the Contents section for more information.
<b>X</b>	
<b>XML ID:</b>	A number automatically assigned by RateManager to identify inputs and categories.

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