ORACLE
INSURANCE

Oracle Insurance

Insbridge Rating and Underwriting

RateManager User Guide

Modules

Release 4.6

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Welcome to the *Oracle Insurance Insbridge Rating and Underwriting RateManager User Guide.* This guide describes the features and functionality of Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager). RateManager is a component within the Oracle Insurance Insbridge Rating and Underwriting (IBRU) System that enables users to manage the product definition and modification process, including premium calculation and underwriting rules management.

AUDIENCE

This guide is intended for RateManager users and system administrators who are tasked with creating rating and underwriting logic and managing system features. Users should be familiar with their company's practices and terminology. Advanced users may benefit from having knowledge of their company's current working rate manual.

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Rating and Underwriting Framework Administrator User Guide.
- You can view this and other IBRU guides on-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.

NAVIGATING RATEMANAGER

Navigate through Oracle Insurance Insbridge Rating and Underwriting RateManager (RateManager) using the top and side menus as well as right click menus, which will be pointed out as they occur. Your browser's tool bars will not be displayed.

If you need to visit another web site, open another window. It is a good practice to save your work before you visit another web site or leave your desk.

NOTE: *IBRU requires Microsoft Internet Explorer. Other browsers are not compatible at this time.*

NOTE: *If you have a popup blocker installed, you will need to disable it for RateManager to work properly. See Appendix A for enabling popups.*

BASIC SAFETY PRECAUTIONS

It is recommended that you secure your computer when you need to step away. This prevents any unintentional deletions or entries and protects the integrity of your work.

INACTIVITY/TIMEOUT

RateManager, a web-based application, will log you out without saving your work if you are inactive for a length of time. Your system administrator establishes the specified time. The default setting is 5 hours. If timeout does occur, log back onto the system and continue to work.

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	P01-725-15	R 4.0	April 2010	New GUI/navigation
2nd Edition	P01-725-16	R 4.0.1	August 2010	Updates
3rd Edition	P01-725-17	R 4.1	December 2010	Updates
4th Edition	P01-725-18	R 4.5	May 2011	Updates
5th Edition	P01-725-19	R 4.5.1	September 2011	Updates
6th Edition	P01-725-20	R 4.6	May 2012	Updates

RateManager allows users to manage rate programs through the definition of variables, algorithms and underwriting rules. The RateManager system uses the same overall structure for any rate program. Within each line of business (Auto, Home, Fire, etc.), you can have an unlimited number of programs under an unlimited number of folders. Within each program, the system uses inputs and translates those into variables both table and calculated. These inputs and variables are then used in algorithms and underwriting rules, producing specific results.

Prior to working in RateManager, you may find it helpful to review a rating manual that contains the rules and premium logic associated with the rating programs you are going to create. Also, you may also want to review any applicable underwriting manuals.

Each line of business will have a set of coverages that makes up the base rate. The rate manual should define what is to be included in those base rates.

DATA PREPARATION

Data preparation is a crucial element in minimizing the amount of time it will take to create a program, as well as determining how easily the program can be maintained. The following points will help you organize what variables need to be created and provide recommendations on setting up tables that will help the program to run at optimal efficiency.

1. Start with the rating manual. Highlight all data elements that will need to be loaded into the program. This may include:

   - Steps to be taken
   - Order of the steps
   - Variables and factors
   - Calculations
   - Rate tables
   - Risk Items

2. Each line of business will have a set of coverages that make up the base rate. Make sure you have defined what is to be included in those base rates.

For Example

A Homeowners Base Rate may include:

- Home/dwelling: This may be a flat dollar amount (In RateManager this would most likely be an Input)
- Other structure: This may be a percentage of home/dwelling (Calculated Variable)
- Contents/Personal Property: This is a percentage of home/dwelling (Calculated Variable)
- Loss of Use: This may be a percentage of home/dwelling (Calculated Variable)
- Liability: This may be a flat dollar amount (Input or Table Variable)
- Medical Payment: This may be a flat dollar amount (Input or Table Variable)

The home dwelling dollar may be calculated on:

- Year built (Input)
- Location/Territory (Input or Table Variable)
- Protection Class (Input or Table Variable)
- Construction (Input or Table Variable)

It is also recommended that you have an electronic version of your data tables. This will help you avoid re-entering data.

3. List all data that can be grouped together in a single table. Examples would be violations and factors based on the same inputs, such as model year factors. Table variables can be linked together to share a single table (linked variables). Linking together variables has the following benefits:

   - A single table needs to be built and imported one time into RateManager.
   - As changes are made to the program, only one table will require alteration for all variables linked to it.
   - Decreases rating time because the program has to access the database less.

4. Outline all algorithms that will be needed to produce rates for the program.

5. Review the algorithms for factors that need to be calculated and are not passed as an input. A class factor is usually determined by several other inputs. Listing out all elements needed to create this variable ahead of time will insure that all calculated variables are completed prior to running the algorithm section.

6. Create your Excel data tables. Each table must be implemented in a separate **tab-delimited** workbook. The data columns need to be entered so that a result is created. In the Example Excel Table, the last column, **Territory,** determines the result value in the first column, **BI.** For example, if the **Territory** is 1, then the **BI** would be 95.

Example Excel Table

BI	Territory
95	1
103	2
131	3
121	4

Restrictions

While RateManager is flexible and accommodating, there are a few restrictions.

Name Fields:

Most name fields, variables, algorithms, inputs, folders and programs, etc., are limited to 40 characters including spaces and most cannot contain special characters. If you enter a special character you may receive an error message.

Restricted Characters are:

Name	Character
Ampersand	&
Apostrophe	‘
Asterisk	*
Colon	:
Greater-Than Sign	>
Less-Than Sign	<
Question Mark	?
Quotation Mark	"

Notes and Change Controls:

The Notes and Change Control fields restricts:

Name	Character
Ampersand	&
Asterisk	*
Backslash	\
Greater-Than Sign	>
Less-Than Sign	<
Question Mark	?
Quotation Mark	"

All other characters will be allowed.

Program and Program Version Names:

Program and Program Version names restricts:

Name	Character
Pound Sign	#

All other characters will be allowed.

Set Message Step:

The Set Message Step restricts:

Name	Character
Ampersand	&
Apostrophe	'
Asterisk	*
Backslash	\
Greater-Than Sign	>
Less-Than Sign	<
Quotation Mark	"
Slash	/
Vertical Bar	|

All other characters will be allowed.

Digit and Decimal Separators:

Digit and decimal separators restricts:

Name	Character
Ampersand	&
Apostrophe	'
Dollar Sign	$
Greater-Than Sign	>
Less-Than Sign	<
Pound Sign	#
Quotation Mark	"

All other characters will be allowed.

Table Variables:

When working with Table Variables, there will be differences in where special characters will be allowed and will not be allowed.

Table variable data files are the contents inside the file to be imported into a table variable or exported out of RateManager. Table Variable Data Files will be rejected if restricted characters are contained within the file.

Restricted Characters are:

Name	Character
Apostrophe	'
Tilde	~
Bar + H	|H

Bar + h	|h
Bar + L	|L
Bar + l	|l

All other characters will be allowed in a table variable data file.

Default Table Variable Values:

A table variable default value is the value entered as the default for the table. Table Variable Default Value restricts:

Name	Character
Apostrophe	'

All other characters will be allowed in a table variable default value.

Table Variable File Names:

A table variable file name is the name of the file that will be imported or into RateManager or exported out of RateManager. For example, 'BI_Rates4-2011.txt'. Table Variable File Names restricts:

Name	Character
Ampersand	&
Apostrophe	'
Asterisk	*
Backslash	\
Colon	:
Greater-Than Sign	>
Less-Than Sign	<
Question Mark	?
Quotation Mark	"
Slash	/
Vertical Bar	|

All other characters will be allowed in a table variable file names.

Updating Variables with Special Characters:

In previous releases of RateManager, some special characters that are now restricted were allowed, for example the asterisk (*). If you attempt to edit an element that uses a special character, you will receive an error. The error message will instruct you to not use the special character.

You can continue to use the element as it is, but you will not be allowed to edit it. If you want to edit the element, you will have to remove the special character.

Elements with special characters that are no longer allowed cannot be updated. Elements that were created with special characters can continue to be used and will not have the special characters removed.

Naming Restrictions

Names should be unique to the area where they are being used to reduce confusion over what element is being used. In many places you will not be allowed to enter a duplicate name, with a few exceptions:

- **Lines of Business:** Names must be unique. Duplicates are not allowed.
- **Sublines:** It is recommended that names be unique per line of business.
- **Subline Folders:** It is recommended that names be unique.
- **Version Folders:** It is recommended that names be unique.

  For subline folders and version folders, names must be unique at the sibling level but can be duplicated if created at either a parent or child level. For example, if you create a folder called 'Level1' you will not be able to create another folder at the same level with that name. You can create another folder underneath 'Level1' and also call it 'Level1'.
- **Programs:** Names are unique per folder. The same program name can be used in multiple folders. In Folder A you can have program 'Jan'. You also can have program 'Jan' in Folder B.
- **Version Names:** Unique per program. The same name can be used in multiple programs. In Program1 you can have version 'Alpha'. You also can have version 'Alpha' in Program 2.
- **Inputs:** Names are unique names per subline.
- **Result Variables:** Names are unique per subline.
- **Table Variables:** Global table variable names are unique per subline. Local table variable names are unique per program.
- **Calculated Variables:** Global calculated variable names are unique per subline. Local calculated variables are unique per program.
- **Algorithms:** Global algorithm names are unique per subline. Local algorithm names are unique per program.
- **Driver Assignment:** Global driver assignments names are unique per subline. Local driver assignment names are unique per program.
- For table variables, calculated variables, algorithms and driver assignments, global names and local names cannot conflict. For example, if you have a global element called 'Rate', you will not be able to create a local element called 'Rate.
- Element names are not verified with other variables and algorithms. For example, if you have an input called 'Manager' you will be allowed to create an algorithm called 'Manager' as well. Each element will have an identifying icon to indicate what kind of element it is.
- **MultiLines, Releases, Test Cases, Impact Analysis Reports, etc.:** Names are all unique per module. You can use the same name across modules. For example, you can create a MultiLines program called 'Test' and a release called 'Test' and so on.

RateManager naming conventions along with distinct icons that can visually assist you in identifying what kind of variable or algorithm is being displayed and whether an element is local or global provide a great amount of flexibility and will allow for most companies to utilize their standard naming conventions.

UNICODE

Unicode allows for multiple language character sets to be used in RateManager. The screens will still be in US English and field values will not be translated. Unicode means that the editable fields on the creation, editing, copying and deleting screens will now be open to the language character set of your choosing. You will be able to enter values in a multitude of languages using a variety of keyboards as long as the keyboard functions in an Internet Explorer environment and the language is recognized by Unicode.

Validation

Character validation will be performed to make sure that special characters are not being used. Special characters are the characters that are commonly used as punctuation markers or shorthand symbols such as ampersand (&), exclamation point (!) and caret (^) or commonly used currency and math symbols such as dollar sign ($), equals sign (=) and pound sign (#). Special characters will be restricted as in previous releases with exceptions for use in certain areas.

For example, the at sign (@) will be allowed in the email field when creating users. Special characters are the common US English special characters. Special punctuation unique to certain language sets, for example, the inverted question mark (¿) will not be restricted. However, these special characters may result in errors and should not be used.

Unicode does not require any additional settings or actions at installation.

Insbridge supports UTF-8, which is a multi-byte character encoding that allows for every character in the Unicode character set to be represented.

Calculations

Calculations using integer, decimal and date values must use the numerals 0, 1, 2, 3, 4, 5, 6, 7, 8, and 9. This is only for calculations. Any other character will be recognized as a string and calculations will not be performed. For example, if you attempted to calculate a value using Roman numerals, you would receive an error message stating that a mathematical instruction cannot be performed on a non-number item. You can use Roman numerals in any field that accepts a string value.

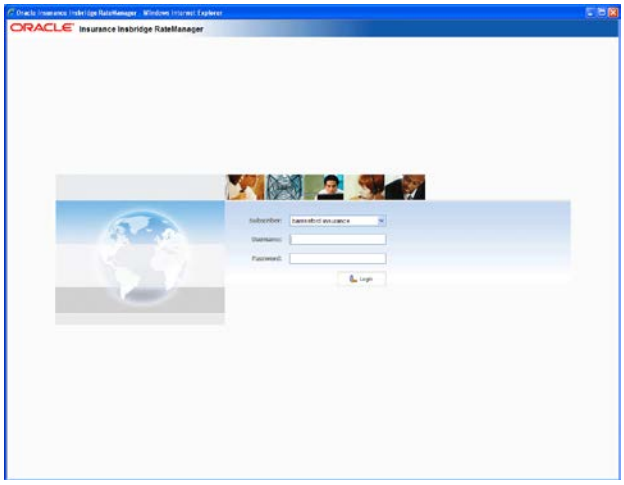
LOGGING INTO THE SYSTEM

Prior to accessing RateManager, you should have received:

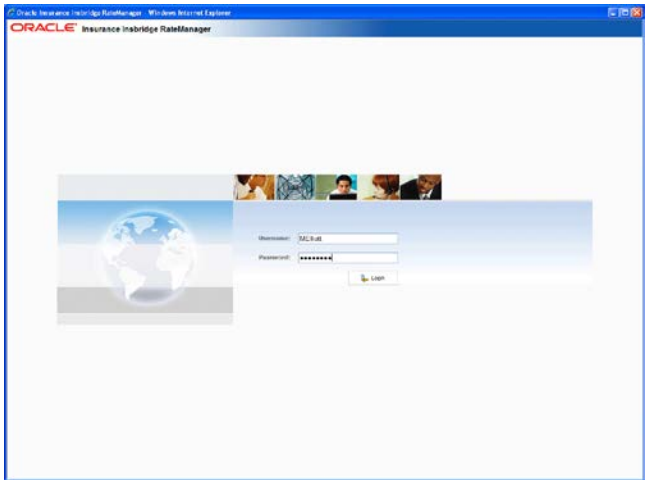
- **RateManager URL:** RateManager can be accessed by going to **http://<yourserver>/rm**, where <yourserver> is the name of the server where RateManager is installed.
- **Username:** usernames are required.
- **Password:** passwords are required.
- **Subscriber:** subscriber information may not be required.

A subscriber may be a single company, a group within the company, or a single person. If more than one subscriber has been set up by the system administrator, you will have to select the subscriber where you want to work. If only a one subscriber has been setup, you will not have to select a subscriber.

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



If multiple subscribers have been setup, you must select the subscriber where you want to work.



A single subscriber has username and password fields only. Subscriber information is not required.

Figure 1 Login Screen

Logging In

Access to RateManager is gained through a login screen. To *login*, enter your username and password and click **LOGIN**. Depending on your company setup, you may need to select your subscriber. If a company subscriber is required, a menu will be displayed. Select the subscriber you need, and continue to log in.

A successful login places you on your Home Tab.

A failed login shows an error message. Please correct any errors and try again. If you cannot log in, please contact your system administrator.

Help Logging In

If you have forgotten your password, username or need assistance with logging into the system, please contact your system administrator.

Rights

RateManger uses rights to allow users access to various areas. The type of rights you have determines what you can view, edit, add or delete. There are three types of rights:

- **No Access:** you cannot enter this area. The fields will be grayed out or not displayed.
- **Read Only:** you can view the information but you cannot make any changes. Save, edit or other features may be listed on the toolbars or right click menus, but you will not be able to effect any changes.
- **Full Access:** you can view, edit, add or delete information where applicable.

The system administrator sets group rights. If there is an area you cannot enter or edit, and you think you need access, please contact your System Administrator.

Logging Out

Logging out will remove you from RateManager.

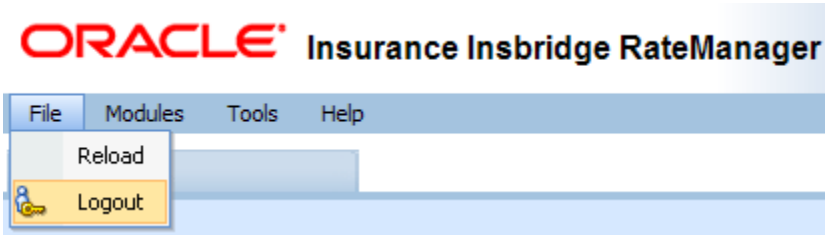


Figure 2 Logging Out

To log out, click File→Logout. If you have any elements open that show a change, you will be asked if you want to save. After saving your work, you will be logged out.

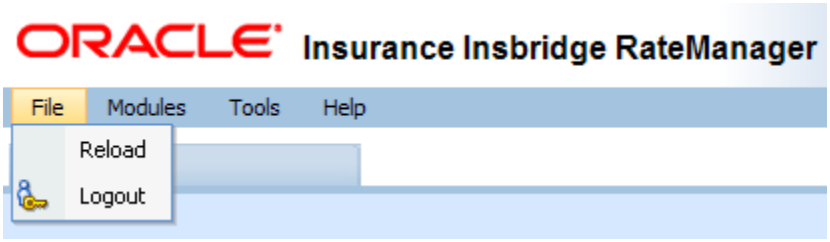
Internet Explorer

RateManager requires an ActiveX controller. Most of the time you will be prompted to install this controller when you begin to use RateManager. A message bar will be displayed at the top of the screen. You can run the ActiveX controller from there. If you experience issues with some RateManager screens in Internet Explorer 7 or Internet Explorer 8, the ActiveX Control may need to be re-registered. Please contact your system administrator for the RateManager for the **RateManager_IE7_IE8.exe** included in the installation download.

RATEMANAGER TABS AND MENUS

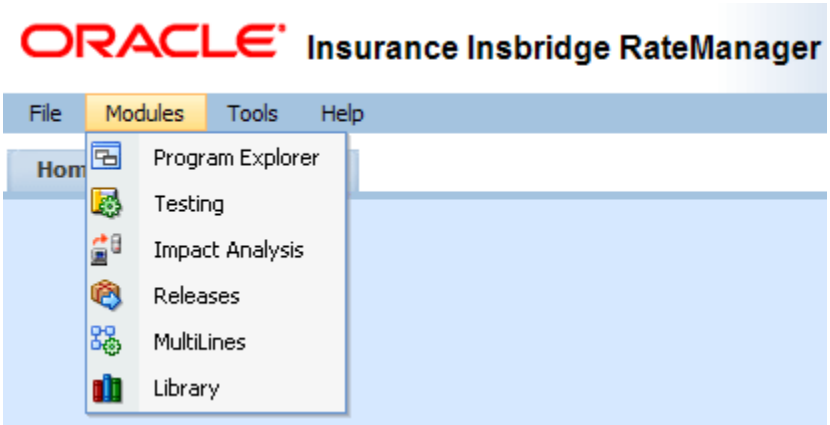
RateManager allows for multiple tabs to be utlized. The tabbed authoring interface allows for multiple activities to be open across separate tabs without losing any functionality. Each tab functions independently. You can view the Program Explorer, then edit a program version, and then create a new algorithm without being forced to close the prior tab.

The RateManager tabs follows a familiar model, a fixed top bar menu with four options. Each option contains a menu of system features. Each feature will open either a new tab or a popup window. The new menus contain the same features that were in previous releases of RateManager.



The File menu:

- **Reload:** reloads the page. Use this option when you want to refresh the screen.
- **Logout:** logs you out of the system.

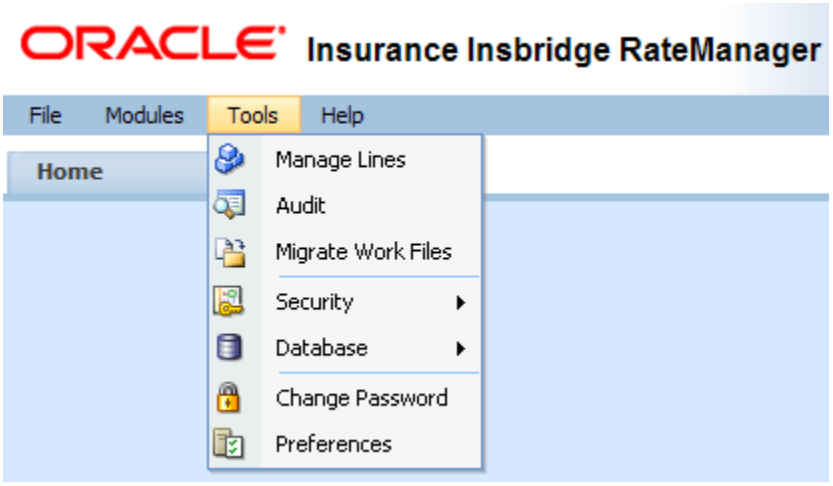


The Module menu:

- **Program Explorer:** the program explorer holds sublines, folder, programs and program versions. Many of the procedures and functions performed under the line of business are found here.
- **Testing:** opens the testing module. This area allows you to test your rating program during development without loading packages. In previous releases, this area was called ScenarioManager.
- **Impact Analysis:** opens the area for batching and data analysis. This area is a combination of previous release BatchManager and PricingManager modules.

- **Releases:** allows groups of rating packages to be automatically deployed and loaded to IBFA through a release. If you do not have release rights, this option will not be displayed. Please see the RateManager Tools User Guide for more information.
- **MultiLines:** a collection of programs from all lines of business combined with output mappings and assigned to execute in sequence that returns a single or multiple results. In previous releases, this area was called Workflows.
- **Library:** the library is where custom XML files used in mappings as well as imported and template programs are stored and managed.

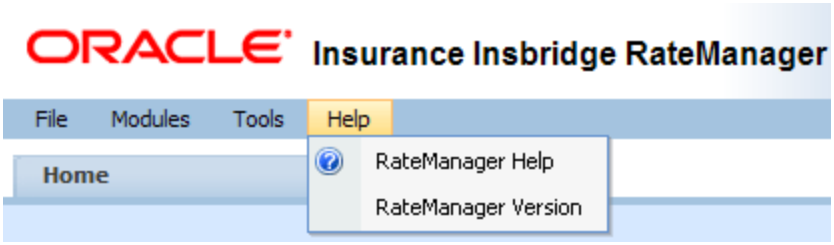
This guide will focus on the features and functionality in the Module menu.



The Tools menu:

- **Manage Lines:** opens a screen where administrators can manage lines of business. This is an advanced system feature and may not be available to all users.
- **Audit:** contains the audit logs of system users. In previous releases, this area was called Logs. This is an advanced system feature and may not be available to all users.
- **Migrate Work Files:** this option migrates the work files from previous releases into the current release. This is an advanced system feature and may not be available to all users.
- **Security:** is where users, user groups and sessions are managed. This is an advanced system feature and may not be available to all users.
- **Database:** this area is for administrators to create backups and deploy updates. This is an advanced system feature and may not be available to all users.
- **Preferences:** brings up the window where you can select the snaps you want to display on your Home Tab. For advanced system users, system setup information will be displayed.
- **Change Password:** allows users to change their password.

For help with Tools menu, please see the RateManager User Guide: Tools.

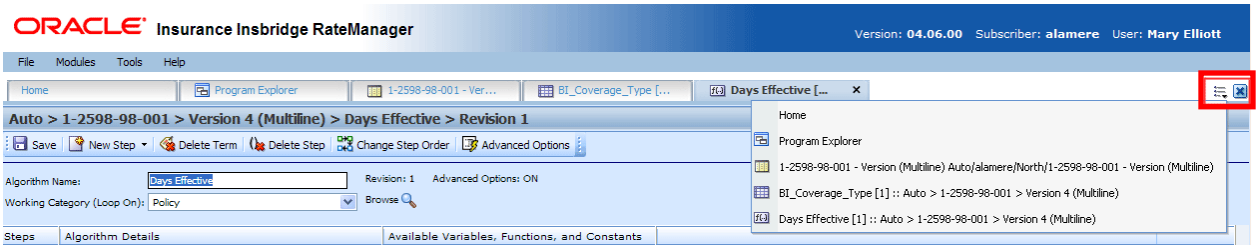


The Help menu:

- **RateManager Help:** clicking this option brings up online help.
- **RateManager Version:** clicking this option brings up system information.

Tab Navigation

Multiple tabs can be open at any time. You can move from tab to tab by clicking the tab you want. You also can click the tab display icon in the upper right hand of the screen to see a list of all the open tabs. You can navigate to any tab in the list by selecting it.



NOTE: *If you have a popup window open, you will have to close the popup before you can click on another tab.*

- The close tab icon closes the tab you are currently on. If you have any elements open that show a change, you will be asked if you want to save.

Keyboard Shortcuts

In a few areas, you will not be able to use your mouse right click features to cut and paste however, you can use your keyboard controls. Highlight the text you wish 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** cuts text.
- **Control + C** copies text.
- **Control + V** pastes text.
- To go to the beginning of an entry, use the home key on your keyboard.
- To go to the end of an entry, use the end key on your keyboard.

Chapter 1

RATEMANAGER CONSTRUCTS

RateManager has a few constructs that you may want to take into consideration when creating your program.

Order of Operations

RateManager does not use the standard arithmetic order of operations to perform calculations. Instead, RateManager performs calculations left-to-right or top-to-bottom.

For example, here is how the standard equation 5 + 2 x 3 would be evaluated using the standard order of operations, versus how it would be evaluated in RateManager:

Standard Order of Operations: 5 + (2 x 3) = 5 + 6 = **11**

RateManager: (5 + 2) x 3 = 7 x 3 = **21**

LOCALE

Locale is defined as the unique attributes of a location including the formatting of dates and numbers. The default locale is the locale of the sever where the IBRU system is installed. Every line activated assumes the default locale. The date mask, the decimal symbol and digit grouping symbol are automatically filled with the defaults from the server. The line of business (LOB) can select a different locale from the server. The values set at the LOB level will apply as the default locale to every program created in the line regardless of subline however, the program can select a different locale if necessary. The updated locale will apply only to the program where the locale was changed.

The locale higherarchy is: the IBRU server determines the LOB locale. The LOB determines the program locale. The locale used by the program is what will be used when rating.

There are two places where you can select the Locale:

- **In the Manage Lines screen:** For more on setting a locale in the Manage Lines screen, please see the RateManager Tools guide.
- **In Programs**

To verify a locale for the LOB, enter the Edit the Line of Business screen in the Manage Lines option. The locale, date and number format are listed for the selected LOB. The Manage Lines option requires administrative permissions. Please contact your system administrator if you require access or need information.

To verify the locale for the program, enter Program Properties. The locale the program is using will be listed.

Selecting a Locale for the Program

You can select a locale for your program when you create a new program or edit an existing program. These are the same Locale options that are available at the LOB level. If you do not select a locale, the locale that the LOB has will be used.

The New Program screen and the Edit Program screen will contain a drop down of available Locales. The default will be the locale of the LOB. These values can be changed and you will be allowed to type in an alternate value if you choose. You must have a value in the Date Mask, Decimal Symbol and Digit Grouping Symbol fields. A Locale will always be listed.

Locale when Packaging

When you package a program (SRP), the Locale that is currently selected will be the Locale that the SRP uses. An SRP will use the Locale that has been selected at the program level. If you update the Locale and re-package, the Locale will be updated as well. If you deploy the updated package to IBFA or IBSS, and the program version has not been changed, the re-packaged version will replace the previous version.

Locale in Global Variables

When editing a global variable, the Locale settings at the LOB level will be used for validation. When editing a local variable that uses a global variable, the Local settings at the program level will be used for validation.

Locale in Table Variables

Table variables will use the Locale that is defined in the program. Data entered into a table variable should match the locale selected. For example, if you have created an Effective Date Table and entered all the data in MM/DD/YYYY format, then you should make sure your Locale matches that date format.

If you attempt to input data that does not match the data and number formatting of the program, you may incur errors.

Locale in Templates

In a template, local elements will retain the date and number formatting of the system where they were created. Date and number formats for global elements will assume the date and number format of the LOB where they were brought in. This may not be the same as the settings of the system where they were created. Be aware that any global elements may be changed if the LOB date and number format is different from the date and number format of the originating system.

Locale in Callouts

When using a Program to Program (P2P) callout, date and number formatting must match or the rating will fail.

Changing a Locale

Changing a Locale at the LOB level will affect the default locale on new programs only. Existing programs will not be affected by any changes. Existing programs will already have a locale set.

Changing a Locale at the program level will update every element used in the program to the new Locale. It is not possible to mix Locales within a program. The selected Locale is currently the Locale that will be used when the program is packaged.

Locked programs can have the Locale updated. Locales will be copied to the newly created program or program version.

Although Locale can be updated at any time, it is not recommended. Updates to Locale may impact rating and may produce unexpected results.

WARNING: *Changing date and number formats may result in programs not running properly. Global variables that have been created as one type of date and number format may not function as expected with another date and number format. Date and number formats should be consistent through the program.*

Date Masks

The date mask (date format) specifies how SoftRater interprets dates being passed into an input file. The value entered for the mask will be the format used to validate the data that you enter for variables.

Date formats are displayed as entered and will be executed and evaluated as you expect during rating. Date formats will be carried through to any new versions or revisions.

Dates must contain:

- 2 digit Month entry MM
- 2 digit Day entry DD
- 4 digit Year entry YYYY or a 2 digit Year entry YY
- One of 3 separators minus sign (-), period (.) or slash (/) Special characters will not be allowed. The list of special characters can be found in Restrictions.

Date formats are defined in the LOB. Any program in the line will use the defined format. A different format can be entered in the program.

- Date formats can be in any combination of the mandatory fields, for example MM/DD/YYYY.
- Date format is case sensitive. You must use capital M, D and Y.
- A separator must be used, i.e. slash(/) MM/DD/YYYY, minus sign (-) DD-MM-YYYY, or period (.) MM.DD.YYYY.

Dates in Upgraded Programs

Previous releases of RateManager allowed for dates to be entered without separators (or delimiters).

If you have upgraded to IBRU 4.5 or later and you are using a date mask that does not contain separators you will need to do the following:

1. Change all Program Date Masks to include separators (or delimiters). Change the mask to match the format of the dates entered in the Program logic (tables, version selection, etc.).
2. Adjust any variable that is masking an input variable of date data type. You will need to make sure that the masking will work with the new Date Mask (format) set in step 1.
3. Any dates in an Insbridge Request file will have to match the new Date Mask (format) set in step1.

These steps will need to be done on any program where the date mask does not have separators.

Number Formatting

Number formatting refers to the decimal and digit separators found in common number formats, for example, 1,000.00 or 10.000,00.

- **Decimal Symbol:** The decimal symbol indicates the integral part of a number from the fractional part. For example, 10.25 (using a period as the decimal symbol) or 8,50 (using a comma as the decimal symbol).

- **Digit Grouping Symbol:** The digit grouping symbol indicates the symbol that will be used to show the thousands separator. For example, 1,000 (using a comma as the digit grouping symbol) or 1.000 (using a period as the digit grouping symbol).

  The digit grouping symbol is used for validation purposes and not for display purposes.

Number formats are defined in the LOB. Any program in the line will use the defined format. A different format can be entered in the program.

- Most separators, i.e. comma (,), period (.), or space ( ) will be allowed. Certain special characters are not allowed. A complete list of special characters can be found in Restrictions.

Restricted Special Characters

Name	Character
Ampersand	&
Apostrophe	'
Dollar Sign	$
Greater-Than Sign	>
Less-Than Sign	<
Pound Sign	#
Quotation Mark	"

- You cannot use the same separator for the decimal and digital. The separators must be different.

- Only one separator per entry. You cannot enter a space ( ) for the millions separator and then a comma (,) for the thousands separator. You have to select either the space or the comma.

Parent Child Relationships

RateManager folders, programs, and categories use a parent child hierarchical data model. This is where the top level of data is designated as the *parent* and any level that falls beneath is the *child*. The top most level is designated as the *root*. Children on the same level are *siblings*. A parent child hierarchical data model allows multiple parents to have multiple children all from one root.

The parent child hierarchical data model creates a tree like structure is similar to Microsoft Windows Explorer. This multi level setup allows you to place an unlimited number of folders and programs underneath a subline of business.

VERSIONING

RateManager supports two levels of versioning to allow you to implement rate changes quickly and easily. These levels are:

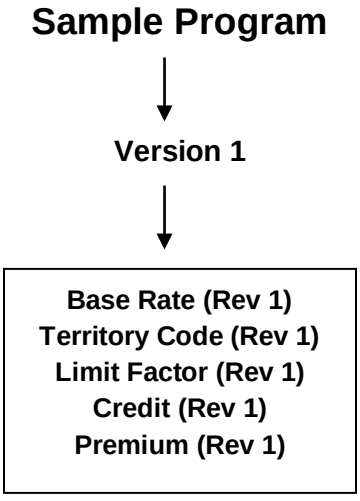
- **Program Versions**
- **Element Revisions**

Program versions and element revisions can be performed on both standard programs and templates programs and are closely related.

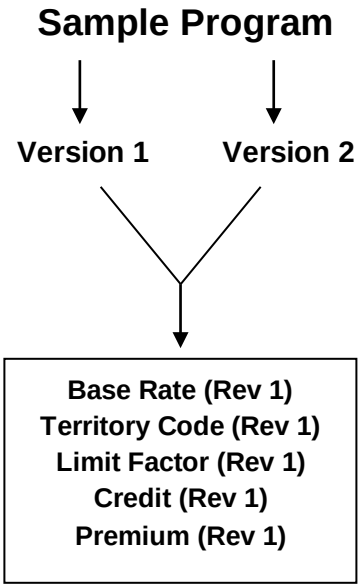
Program Versioning

When a new version of a program is created, it is not a copy of the version it was based on. Instead, the new version is a pointer to the original version and all items that exist in that version.

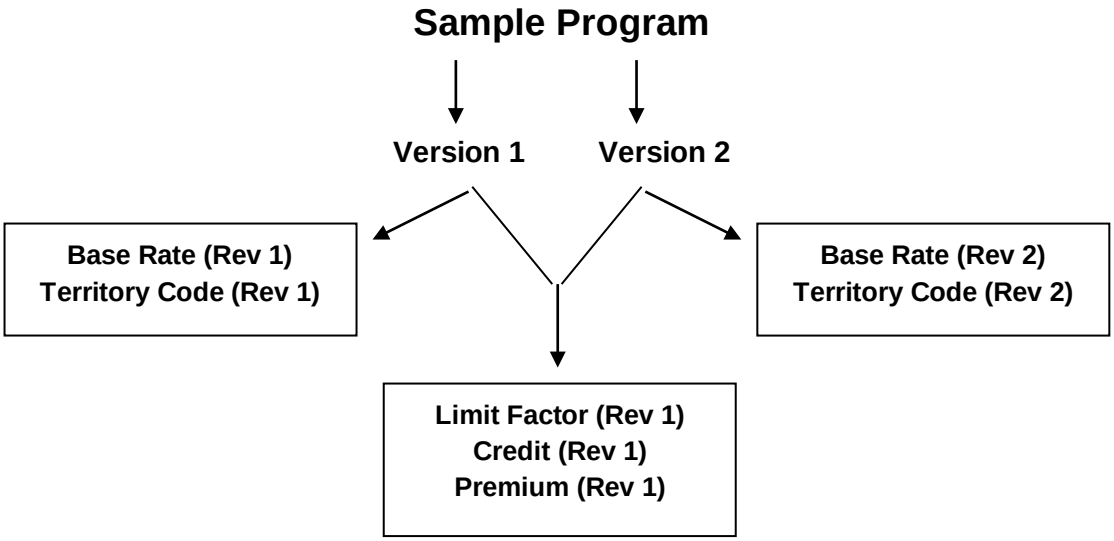
Sample Program represents an initial program before any new versions have been created.



When a second version is created, it initially points to all the same variables and algorithms as the first version.



In order to load a rate change, you will need to create a second revision of all the variables and algorithms that reflect the rate change. In this example, if the Base Rate variable and the Territory Code variable change, you would make a second revision for both of variables. Version 1 would still use revision 1 of all variables. Version 2 would use revision 2 of the Base Rate variable and Territory Code variable, but would still use revision 1 of all the other variables and algorithms.



Element Revisions

All elements of a program can be versioned individually. Figure 3 is an example of revisions for a specific table variable, shown by using the **Show/Hide Revisions** option on the right click menu of the variable.

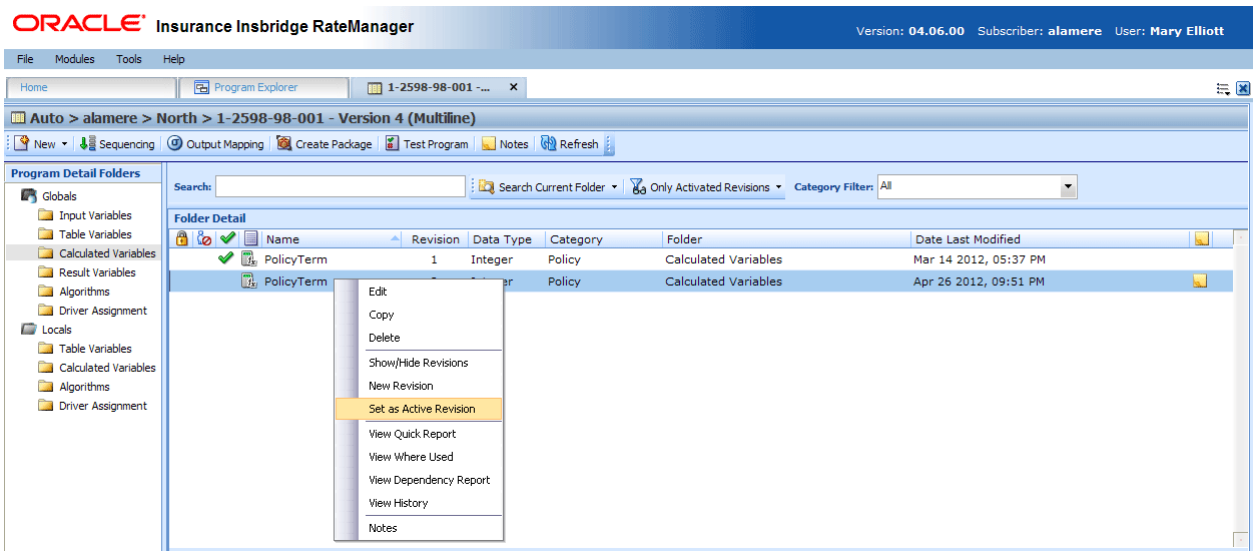


Figure 3 Program Element Revisions

If you wanted ClassFactor to use Revision 2, you would select Revision 2 and right click and select Set as Active Revision. The green checkmark indicates which revision is the active revision. You also can filter results so that only the active revisions are displayed.

NOTE: *All table variables, calculated variables, algorithms and drivers assignments can be versioned: including any global instances of these elements.*

Chapter 2

HOME TAB

Once you have logged in, you will be on your Home Tab. The Home tab has a control panel that contains links to all the major components of RateManager. Additional panels called *Snaps* also can be added. Snaps are modules that contain information or links to elements that you recently worked on. For example, if you selected the snap **My Recently Opened Programs**, you would see a list of the last 10 programs that you opened.

The Home tab can be customized to contain the information you want to see immediately when you log in. The Home tab will always be the first tab and cannot be closed.

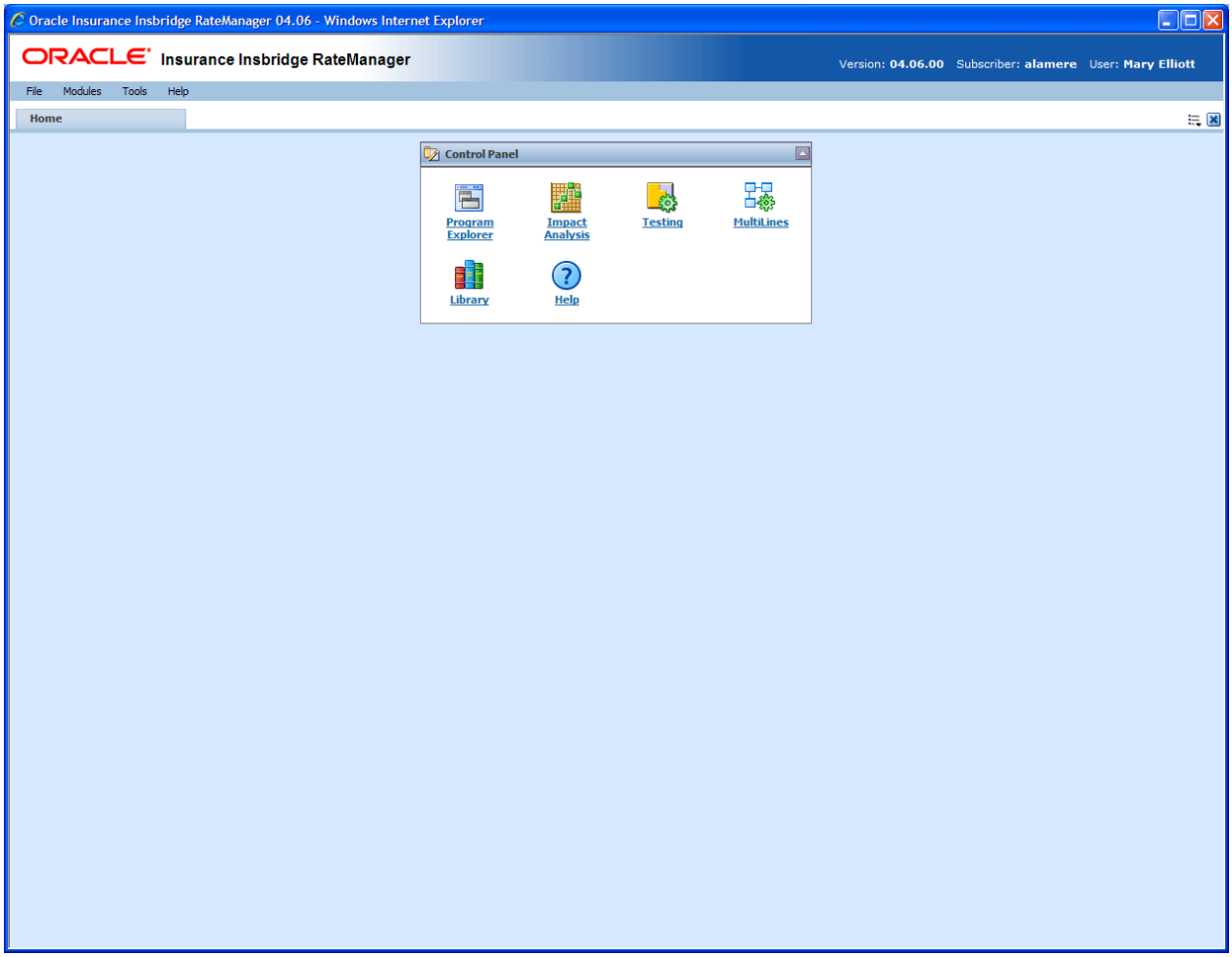


Figure 4 Home Tab

The Control Panel contains links to all the major components of RateManager. This area cannot be removed but can be reduced by clicking the up arrow in the upper right hand corner of the panel. Depending upon your rights, you can have up to seven links:

- **Programs:** opens the Program Explorer.
- **Impact Analysis:** opens the Impact Analysis screen.

- **Testing:** opens the Testing area.
- **MultiLines:** opens the MultiLines area.
- **Library:** opens the Library area.
- **Releases:** opens the Releases area.
- **Help:** opens on-line help.

If you do not have rights to an area, a link will not be listed in your Control Panel. For example, in Figure 4, this user does not have rights to Releases. Her Control Panel does not contain links for that option.

Using Snaps

Inside the snap is a link to the program or element where you recently worked. Double click on the name of the program or element. A new tab will be opened for the selected item. You also can right click on the link in the snap to open.

You can remove links from the snap by right clicking on the link and selecting to remove from the list.

Snap Icons

There are two icons in the snap top banner:

	If you no longer want the snap, click the close icon. The snap will be unchecked from your preferences and will no longer be displayed on your Home Tab. To place the snap back on the Home Tab, you must enter Preferences and select it.
 	If you want to minimize the snap, click the up arrow. This will leave the snap on the Home Tab but reduce the details. The snap top banner will be grayed out. To open the snap back up, click the down arrow.

Positioning Snaps on your Home Tab

Snaps can be repositioned on your Home Tab.

1. Position your cursor over the snap top banner until you get a four arrow cursor.
2. Hold your left mouse button down to select. You will know the snap is ready to move when the entire snap is grayed out.
3. Drag the snap to the location you want. A gray shadow will be positioned where the snap will be placed. If the shadow is not visible, you do not have the snap in a location where it can be placed.
4. If this is the location you want, release the mouse button. This will drop the snap in place.

Sorting Snap Information

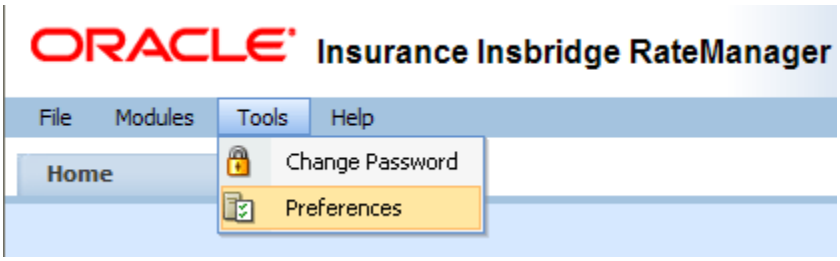
Snap information is listed by Date Last Opened, newest to oldest. To rearrange the information in the snap, click the column header. Information will be sorted either alphabetically or numerically, depending on the column header.

Adding Snaps to the Home Tab

Preferences is where you select the snaps you want to place on your Home tab. The Control Panel snap will not have an option to add or remove.

To Select Your Snaps

1. From the top bar menu, select **Tools** and then click **Preferences**.



2. This will open the **Preferences** window.

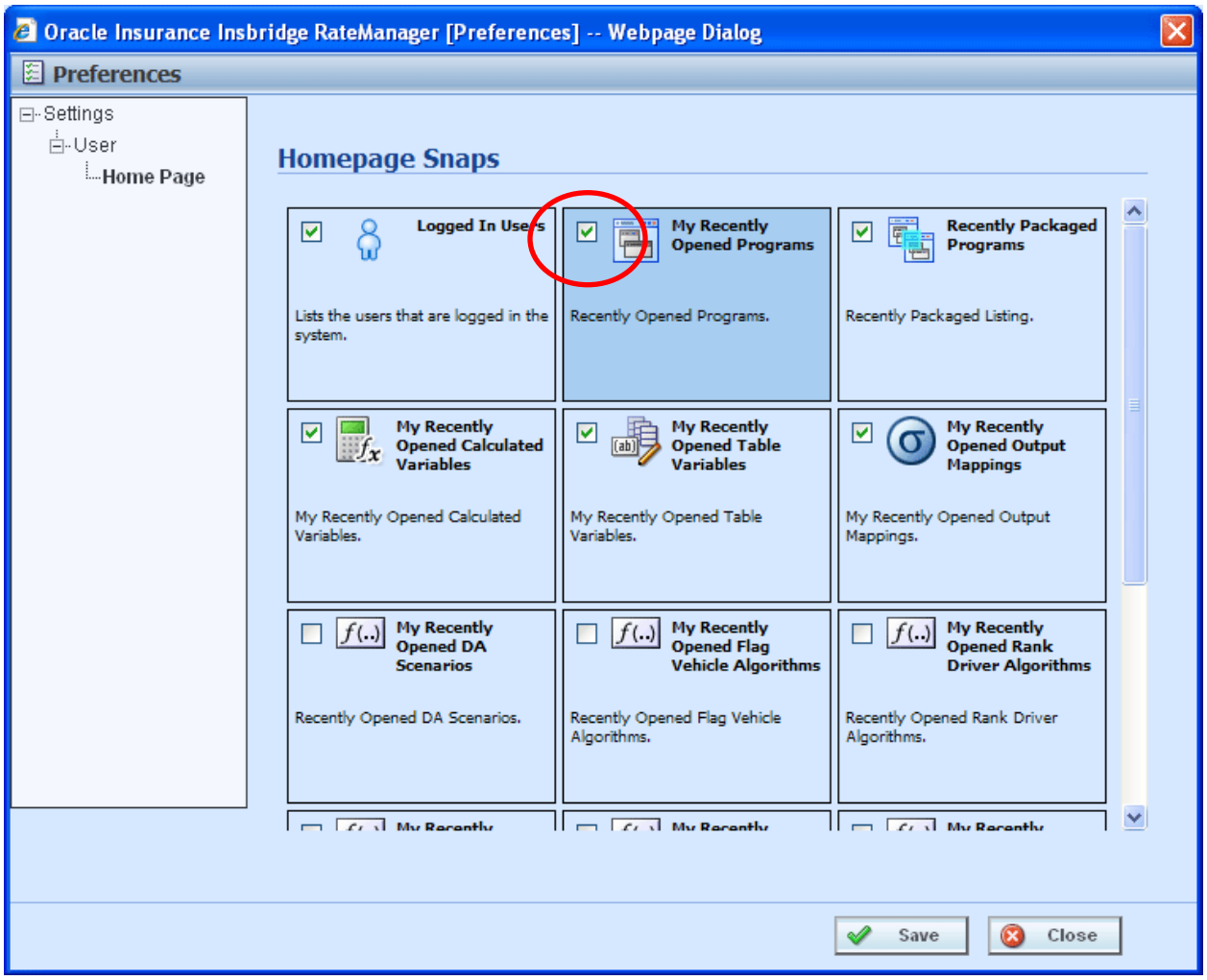


Figure 5 Preferences Screen

3. **Select the Snaps** you want displayed on your Home Tab by checking the box in the corner.

   There are 15 snaps available. 12 snaps contain links to recently worked on elements. These snaps are labeled "*My Recently…*" Opened Programs, Packaged Programs, or Opened Table Variables.

The "*Logged In Users*" snap lists the users who are logged in to the system right now. The "*Oracle RSS Feed*" will display the Oracle news feed. This snap may require a proxy setting to be entered by the system administrator in order for it to function properly. If an outside internet connection is not allowed, you will receive an error message. There is also a "*Tutorial Videos*" snap that will allow users to view video segments about the features and functionality contained in RateManager.

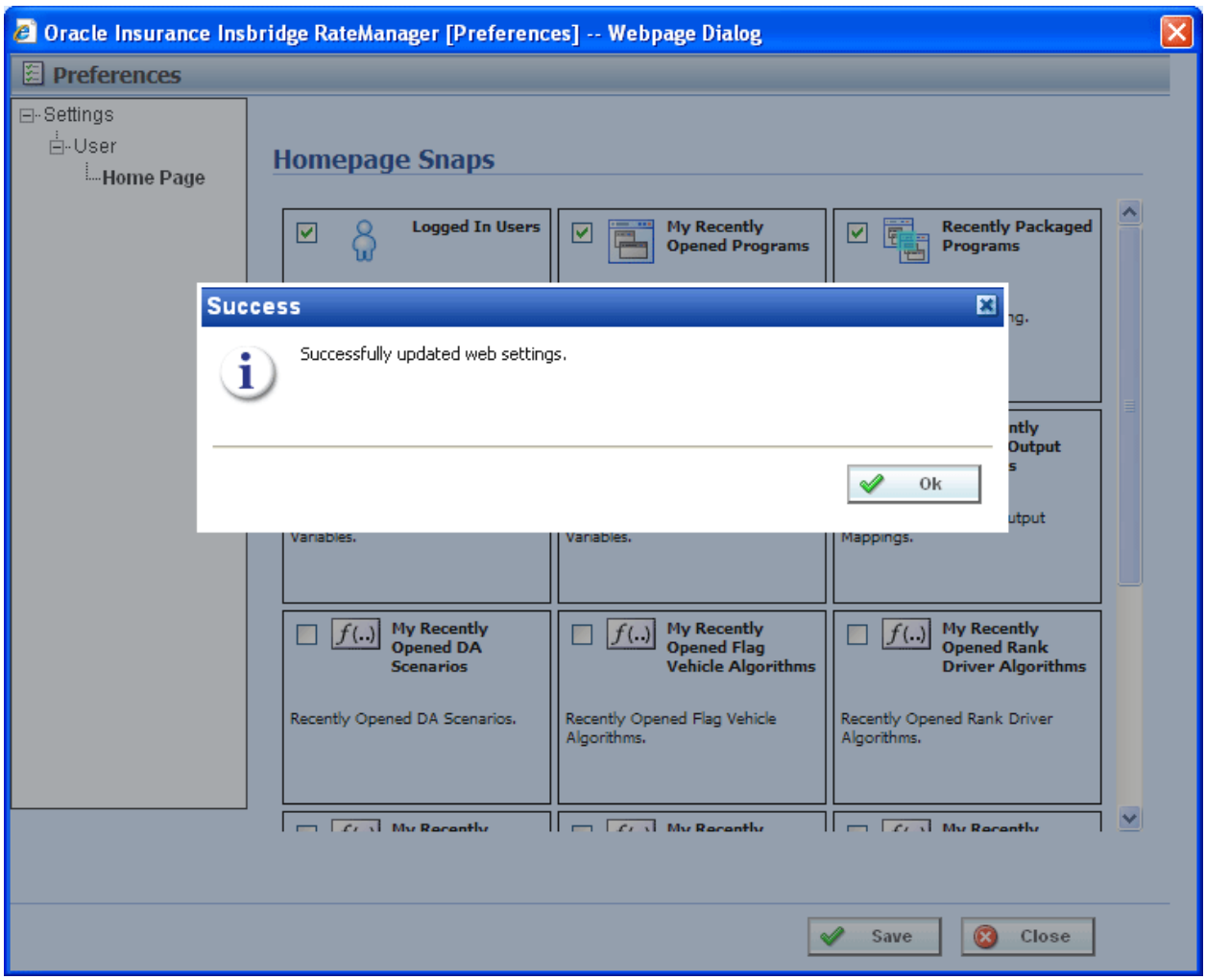


Figure 6 Updated Preferences

4. Click **SAVE** to save your selections. A success message will be displayed.

5. Click **OK** to return to the preferences window.

6. Click **CLOSE** to close the preferences window. Your HOME tab will display the snaps you have selected.

NOTE: *If your HOME tab is not displaying your snaps, click File → Reload to refresh the screen.*

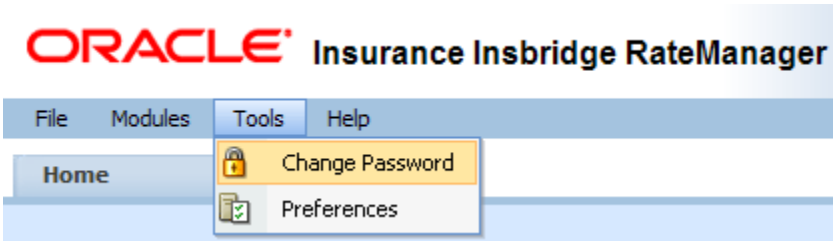
Changing Your Password

You can change your password at any time. RateManager does not prompt users to change their passwords.

It is recommended that you change your password periodically to prevent other users from logging in and making changes using your user ID.

To Change Your Password

1. From the top bar menu, select **Tools** and then click **Change Password**.



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

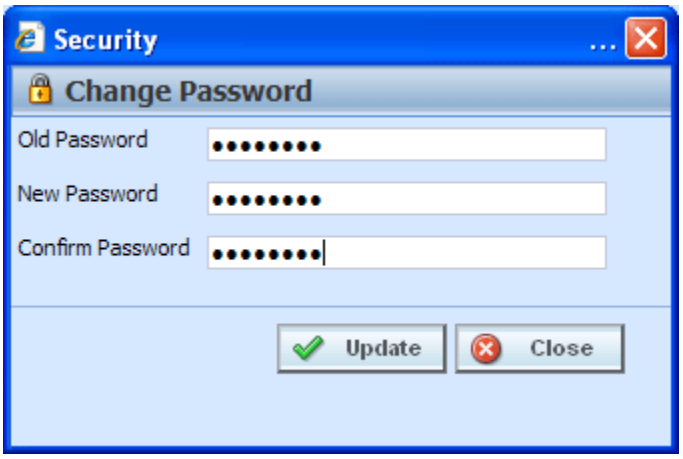


Figure 7 Change Password Screen

3. Enter your current password in the **Old Password** text box and enter your new password in the **New Password** and **Confirm Password** text boxes.

   Your password must be at least six, but fewer than twelve, alphanumeric characters.

4. When you are finished, click **Update** to update your password. The next time you log into RateManager, you will need to use your new password.

Chapter 3

PROGRAM EXPLORER

Program Explorer serves as a central location for creating and managing programs and accessing program elements. Active lines of business that you have permission to view will be displayed on the left hand side of the tab. Underneath the lines will be the sublines, and then the folders, programs and globals that belong to that subline. All program elements; inputs, variables, algorithms, sequencing, output mapping and categories can be found within the Program Details tab of any selected program.

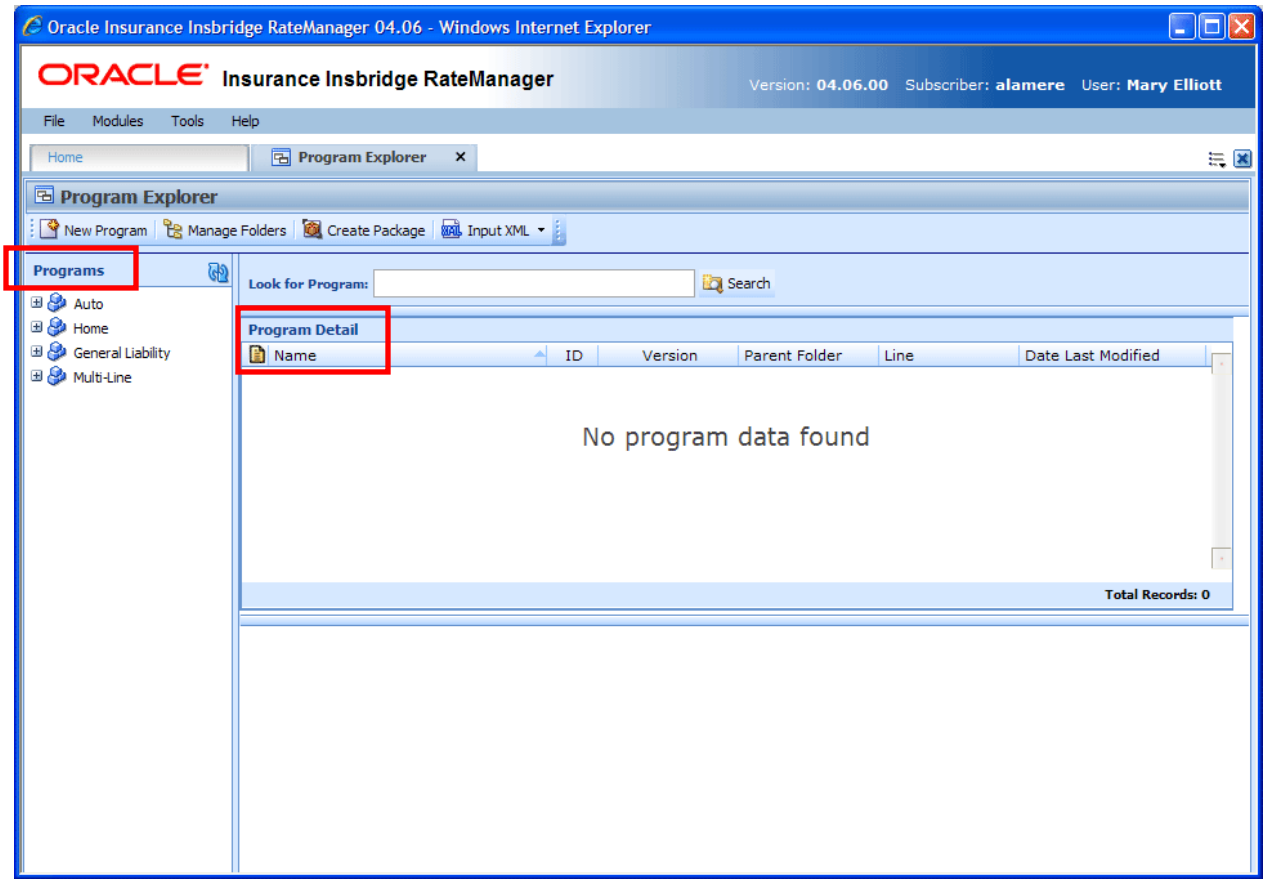


Figure 8 Program Explorer

Program Explorer is divided into two areas:

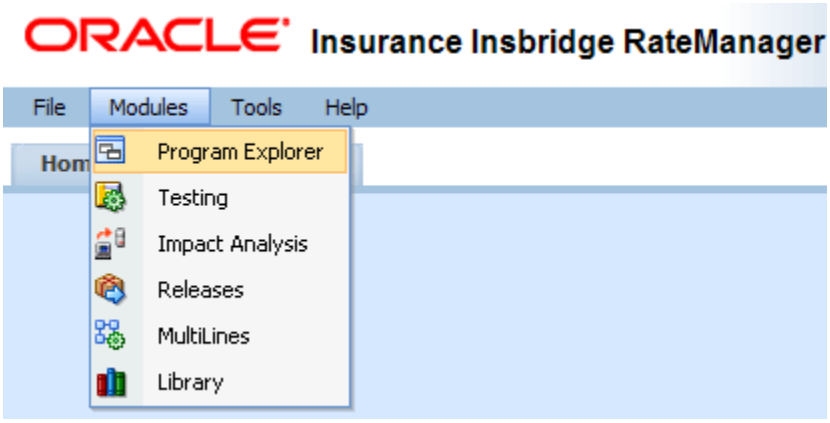
- **Programs:** Programs is a navigation column on the left hand side of the tab. Programs displays the lines of business you have rights to. As you expand the line, you will be able to see the sublines, folders, and programs currently in the LOB.
- **Program Detail:** Program detail contains the details of the element you have selected from Programs. The item you select in the Programs area determines what information is displayed in the Program Detail area.
  - Select the **line of business** to view the **sublines**.
  - Select the **sublines** to view the **folders**.

- Select the **folders** to view the **programs**.
- Select the **programs** to view the **program versions**.

Program elements are displayed in a separate tab from the program version. You also can select a program element from a snap on your Home tab.

You must have rights to view the lines and work in Program Explorer.

Navigation:



- You can get to Program Explorer from the top menu bar. Program Explorer is located in Modules→ Program Explorer.
- You also can click the Program Explorer Icon in the Control Panel on the Home tab.

FUNCTIONALITY

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

Functions:

New Program	**New Program:** Begins the process of creating a new program. You must select the line→subline→folder where the new program should be created.
Manage Folders	**Manage Folders:** Opens the Manage Program Folders function for the selected line→subline.
Create Package	**Create Package:** Opens the Create Package function for the selected program version.
Input XML	**Input XML:** This option brings up the XML for: • **Line:** If you select the subline, or the subline→folder or subline→folder→program, the line inputs XML will be displayed. • **Program Version:** If you select a program version, the input XML for this program version will be displayed. This option will be available only if you select a program version.

Search:

The ***Search*** field allows you to search for a particular program. Select the subline where you want to search. Type or paste the program name you are looking for and then click **Search**. Searches are at the subline level. You cannot search one folder only. If you select a folder, the search will be done at the subline level.

As you type, matches may populate the field underneath. The program name, program ID and folder location will be listed. If the program you are looking for is there, you can click the match and your program will be displayed.

PROGRAMS

Programs is the navigation column on the left hand side of the Program Explorer. Icons will be displayed as the fields are expanded. Lines, Folders and Programs will be displayed after they are created.

FIELDS

Fields are labled with the current name assigned to them.

	Lines: The active lines that you have access to will be displayed. Click the line to view the sublines.
	Sublines: Every line has a default subline. If any user created sublines have been added, they will be listed. Click the subline to view the folders.
	Subline Folders: All subline folders are user created and must be created before you can create or apply programs. Click the folder to view the programs inside.
	Program Version Folders: This optional folder is displayed under every program in the folder. Individual program versions can be sorted in to program version folders. Click the folder to view contents.
	Programs: RateManager programs. Click the program to view all the versions.
	Globals: Double click the Globals icon to open up the Global Details tab for the subline.
	Refresh: Refreshes the screen with the current information.

Right Click Menu Options

In the Programs area, select the field and right click to view a menu. Lines and Program Version Folders will not have a right click menu.

	Lines: Has one option • **New Subline:** Allows you to create a new subline. This menu option is available to users with Subline Management rights.
	Sublines: Has five options • **Create Versioning Package:** Allows you to create a global versioning package. • **Map Custom XML:** Brings up the Map Custom XML for the global inputs in this subline. • **Edit Subline:** Opens the Subline Editing window. The default subline cannot be edited. • **Clear Subline:** Removes all contents, programs and data, from the subline. • **Delete Subline:** Deletes the entire subline.
	Subline Folders: Has four options • **New Program:** Creates a new program in this folder. • **New Folder:** Brings up the New Folder screen where you can create a new folder. • **Edit Folder:** Brings up the Edit folder screen where you can edit this folder.

	• **Delete Folder:** Deletes the selected folder.
	Program Version Folders: No right click menu.
	Programs: Has four options • **Program Properties:** Brings up the Edit Program screen where you can make edits to the versioning criteria and other program information. • **Move Program:** Allows you to move the program from one folder into another within the same subline. • **Delete Program:** Deletes the selected program. • **Program Difference Report:** Brings up the Program Difference Wizard.
	Global: One option, Open. Opens the Global Details tab for the subline.

PROGRAM DETAIL

The Program Detail area is where the details of the element you have selected from Programs will be displayed. The item you select in the Program Folders area will determine what information is displayed in the Program Detail area.

FIELDS

The results can be sorted by field. To change the order, click the field you want to sort by. The sort icon will indicate the field that is determining the sort order.

SELECTION	DISPLAYS
Line	Information for the sublines that fall under the selected line. **Icon:** There are two possible icons - Indicates the **Default** subline - Indicates **Template** generated sublines **Name:** The name of the subline. **ID:** Not used for sublines. **Version:** Not used for sublines. **Parent Folder:** Not used for sublines. **Line:** The line of business where the subline is located. **Date Last Modified:** The date the subline was last modified.
Subline	Information for the folders that were created under the selected subline. **Icon:** There will only be a folder icon **Name:** The name of the folder. **ID:** Not used for folders. **Version:** Not used for folders. **Parent Folder:** Displays the pathway of the folder. **Line:** The line of business where the folder is located. **Date Last Modified:** The date the folder was last modified.
Folder	Information for the programs that were created under the selected folder. **Icon:** There will only be a program icon **Name:** The name of the program. **ID:** The program ID number. **Version:** Not used for programs. **Country:** The country this program was created for. **State/Province:** The state/province this program was created for. **Parent Folder:** The folder where this program resides. **Line:** The line of business where the program is located. **Date Last Modified:** The date the program was last modified.

SELECTION	DISPLAYS
Program	The program versions for the selected program. **Icon:** There are two possible icons - Indicates the **User** created program - Indicates **Template** created program **Name:** The name of the program. **ID:** The program ID number. **Version:** The program version number. **Version Name:** The program version name. **Lock:** An administrator can lock the program to prevent it from being changed or deleted. **Parent Folder:** The folder where this program version resides. **Line:** The line of business where the program version is located. **Date Last Modified:** The date this program version was last modified. **Last Packaged On:** The date and time the last RateManager package was created for the version. **Note:** An icon will indicate if this program version has a note. **Version Folder:** If this program version has been placed in a program version folder, the program version folder name will be listed.
Program Version Folder	The program versions for the selected program. **Icon:** There are two possible icons - Indicates the **User** created program - Indicates **Template** created program **Name:** The name of the program. **ID:** The program ID number. **Version:** The program version number. **Version Name:** The program version name. **Lock:** An administrator can lock the program to prevent it from being changed or deleted. **Parent Folder:** The folder where this program version resides. **Line:** The line of business where the program version is located. **Date Last Modified:** The date this program version was last modified. **Last Packaged On:** The date and time the last RateManager package was created for the version. **Note:** An icon will indicate if this program version has a note.
Global	No change.

Right Click Menu Options

The right click menu options are available on most elements displayed in the Program Detail area. The menu will depend upon the element selected and the rights you have.

SELECTION	DISPLAYS
Line	Information for the sublines that fall under the selected line. Sublines have five options: • **Create Versioning Package:** Allows you to create a global versioning package. • **Map Custom XML:** Brings up the Map Custom XML for the global inputs in this subline. • **Edit Subline:** Opens the Subline Editing window. The default subline cannot be edited. • **Clear Subline:** Removes all contents, programs and data, from the subline. • **Delete Subline:** Deletes the entire subline.
Subline	Information for the folders that were created under the selected subline. Folders have two options: • **Edit Folder:** Brings up the Edit Folders screen where you can edit the folder. • **Delete Folder:** Deletes the selected folder.
Folder	Information for the programs that were created under the selected folder. Programs have five options: • **Program Properties:** Brings up the Edit Program screen where you can make edits to the versioning criteria and other program information. • **Move Program:** Brings up the Move Program screen where you can move a program within the subline. • **Delete Program:** Deletes the selected program. • **Program Difference Report:** Brings up the Program Version Report. • **See Program Versions:** Refreshes the tab with the program versions.
Program and Program Version Folders	The program versions for the selected program. Program versions have 12 options: • **New Version:** Creates a new program version from the selected program version. • **Open:** Opens the Program Details tab for this program version. • **Edit Versioning Data:** Brings up the Edit Program Version screen where you can make edits to the versioning criteria and other program information. • **Copy:** Creates a copy of the program version. • **Delete:** Deletes the program version. You must have rights to delete program versions. • **Test Program:** Opens Test Program, which allows you to test and debug a program within RateManager. • **Map Callouts:** Allows you to map this program version to callout to other programs or libraries. • **Map Custom XML:** Brings up the Input Variable Mapping screen for this

	program version. This screen is where you can enter, view, import or upload input mappings. • **Notes:** Enter, edit and view notes to the program version. • **Program Version Report:** Brings up the Program Version Report. • **Unassign From Program Version Folder:** removes a program version from the program version folder where it was assigned. • **Assign To Program Version Folder:** Brings up the Assign Version to Program Version Folder screen. Here you can assign a program version to a folder. Template Generated programs will also have: • **Reconcile:** This option will reconciled two program versions.
Global	No Change.

LINES AND SUBLINES OF BUSINESS

Lines are managed in the Manage Lines option of the Tools menu. The Manage Lines option is available to system administrators and users with manage line permissions. If Lines are not set up prior to working in Program Explorer, please contact your system administrator.

SUBLINES

Lines are separated into *sublines*. Sublines are classifications that fall in between lines and program folders. Sublines allow you to distinguish program sources and also keeps the globals unique within that subline. Globals are subline specific and are not shared across sublines. There are two types of sublines, user created and template generated.

- Indicates **User Created** sublines
- Indicates **Template** generated sublines

User Created Sublines

A user created subline is a subline that was created by a user with subline management permissions. User created sublines hold user created programs and imported programs. Most user created sublines can be edited, cleared or deleted. The exception is the default subline which can only be cleared.

Each line automatically has one user created subline placed underneath it. This subline is named with your subscriber description and is the *default* subline. The default subline cannot be edited or deleted and is always listed first.

The subscriber description was entered by the system administrator when your subscriber account was set up. If your subscriber description is Alamere, then under every line will be a subline named Alamere.

NOTE: *If you want to change the default subline name, please contact your system administrator and ask to have your subscriber description changed.*

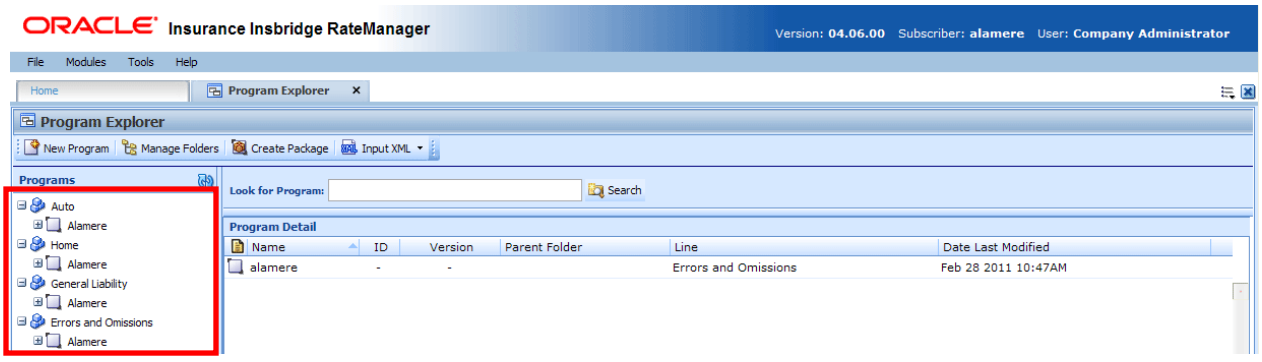


Figure 9 Default Sublines under Each Line of Business

Template Sublines

Until you have applied a *template*, any new programs that you create are placed under the default subline or a user created subline. Templates are programs that have been uploaded into the RateManager Library. For more on templates, imports and libraries, please see Library.

When a template is applied, a new subline is created for each template *source*. The source is the creator of the template and also the name of the new subline. For example, if a template created by the Content Services group is brought into the General Liability line, a new subline called Content Services is placed under the General Liability line.

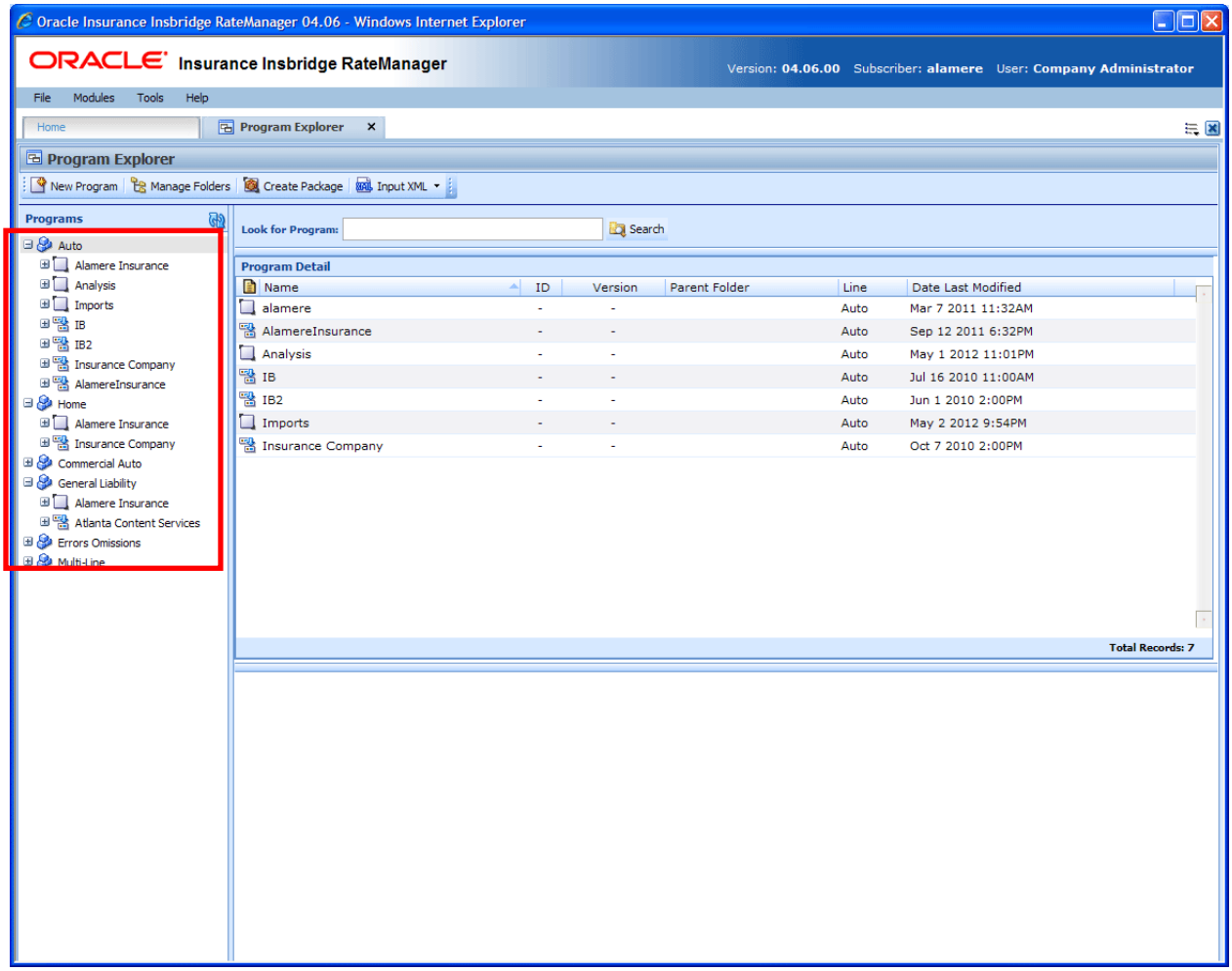


Figure 10 Program Explorer Populated with Lines, User Created Sublines and Teamplate Sublines

Each line can have multiple template generated sublines. Multiple template generated sublines can be created for each source. You can create a new template generated subline for every template applied if you need to. You also may be required to create a new template generated subline if there are category or input differences between existing templates and the new template you want to apply. Template sublines names cannot be edited. Template sublines can be cleared and deleted.

When you click on a subline, you will see the folders that were created under the selected subline in the Program Detail area. To view the programs for that folder, double click the folder. You also can expand the subline contents in the Programs area to see all folders and programs under the subline.

New User Created Sublines

New user created sublines can be created at any time. A new template generated subline is created only when a template is applied from the Library. Any new subline is displayed under the corresponding line of business. For example, if you applied an auto template, a new subline will be created under the auto line. The new subline will be named after the source. If you select the Auto line and create a new subline, the new user created subline will be listed there.

New User Created Sublines

1. Select the line of business where you want to create a new user created subline.

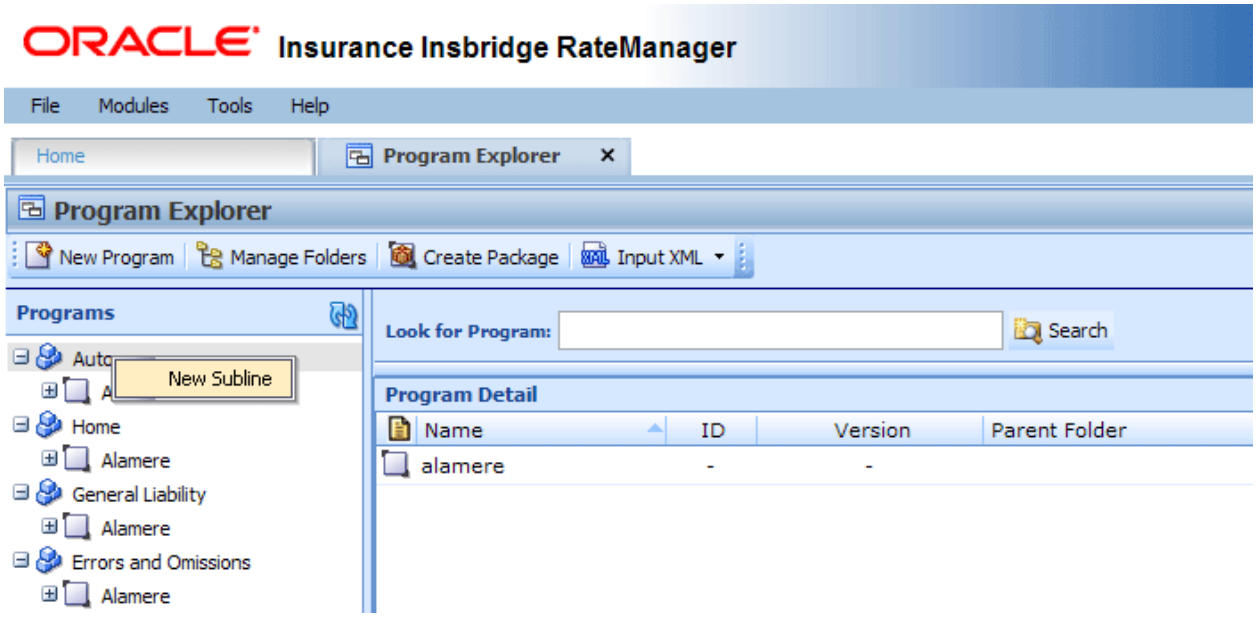


Figure 11 Right Click for New Subline

2. Right click and select New Subline. The New Subline screen is shown.

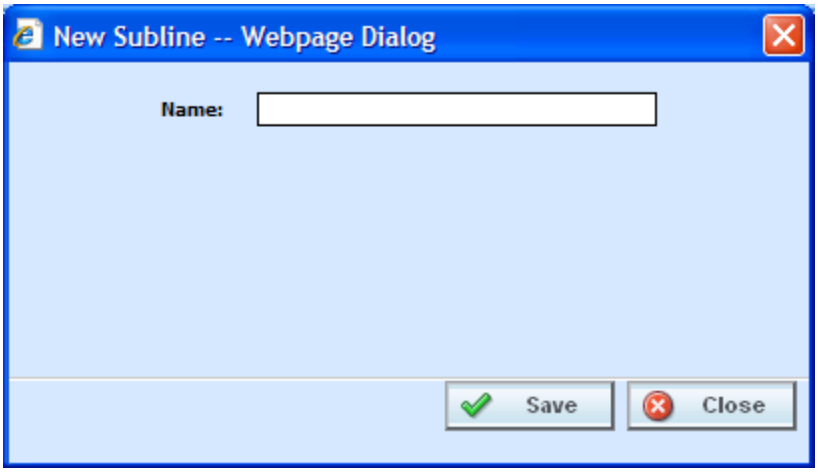


Figure 12 New User Created Subline

3. Enter in a Name.

4. Click Save to save your entry. After the Program Explorer tab refreshes, the new subline will be listed.

Figure 13 Program Explorer with New Uer Created Subline

Edit

Only user created sublines can be edited. Editing allows for the name to be changed.

1. Select the line of business where you want to edit a user created subline.

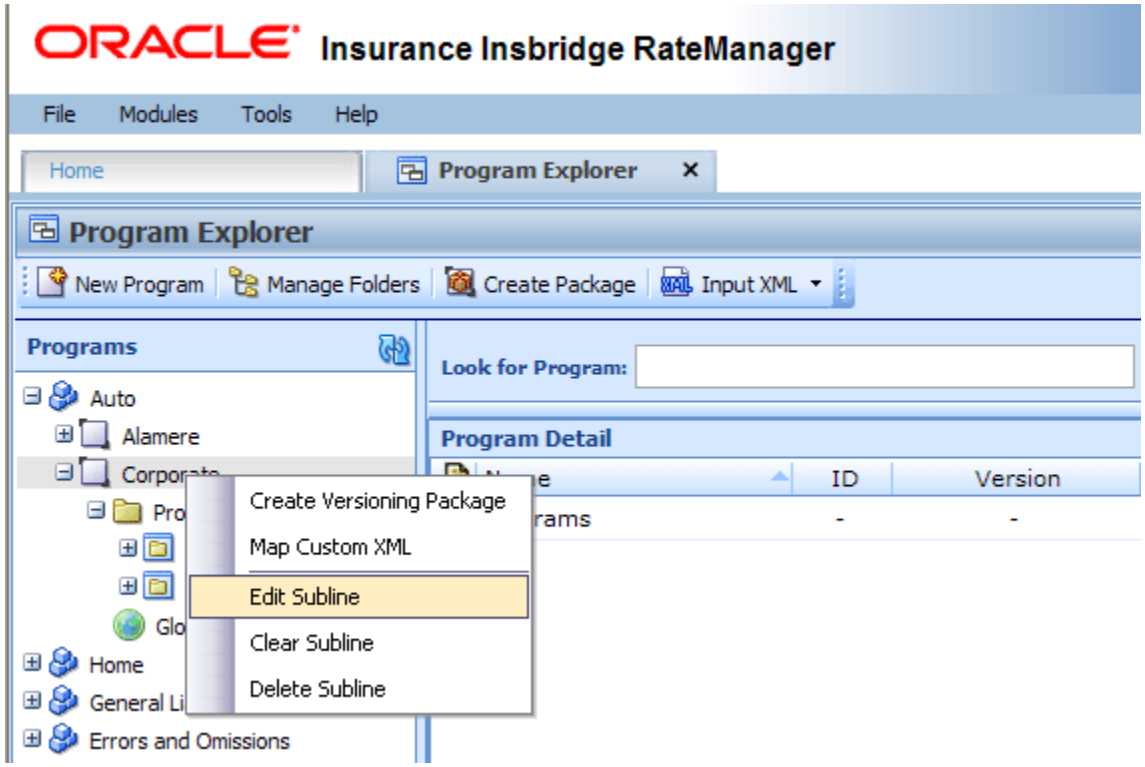


Figure 14 Editing a Subline

2. Right click and select Edit Subline. The Edit Subline screen is shown.

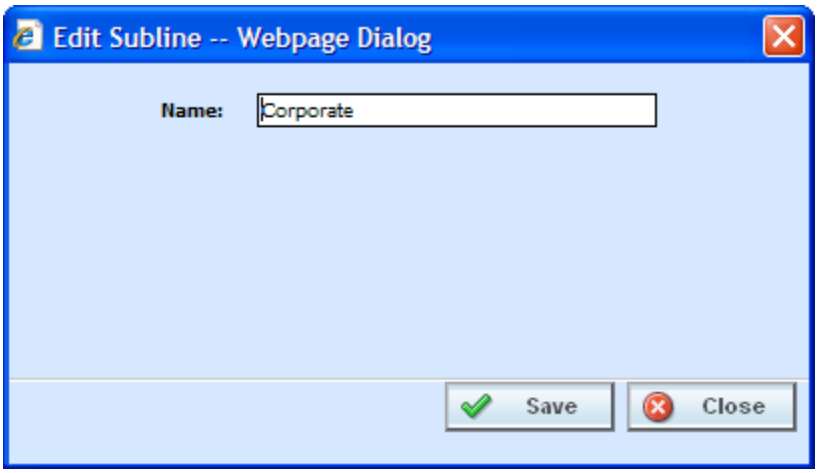


Figure 15 Editing a Subline on the Edit Subline Screen

3. Make your changes.

4. Click save to save your entry. After the Program Explorer tab refreshes, the changes are shown.

Clear

Clearing a subline removes all content from the subline. All folders, programs, and data, including categories, inputs, variables, sequences, and mappings, are cleared. Clearing a subline allows you to create, import, or apply content into a clean environment. For example, if you try to apply a new template and receive a notice that the category structure does not match, you will not be able to apply that template to the subline. You can create a new subline or you can clear the old subline if you no longer need any content in there. Clearing the subline removes the previous category structure and allows you to apply the new template.

Clearing a subline should be done only when nothing in the subline is needed. Make sure this is the action you want to take. Once a subline is cleared, there is no undo. You will be asked to confirm your selection twice before the subline is cleared. Any subline can be cleared at any time.

You must have subline management permissions to clear a subline. If the clear subline option is grayed out, you do not have permissions.

Clearing Sublines

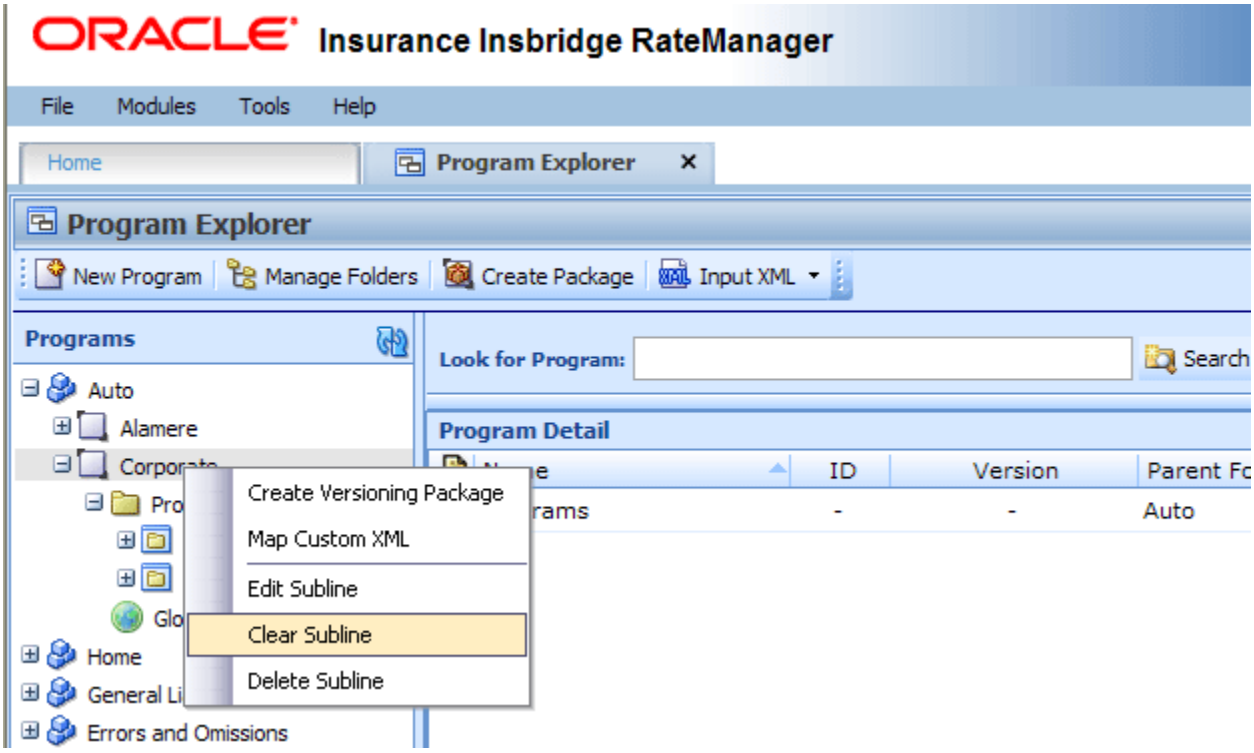


Figure 16 Clearing a Subline

1. Select the line of business where you want to clear a subline.
2. Right click and select Clear Subline.

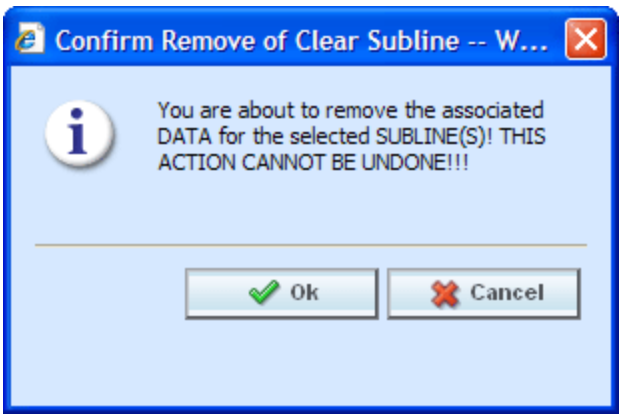


Figure 17 First Confirmation to Clear the Subline

3. Click OK to clear the subline.

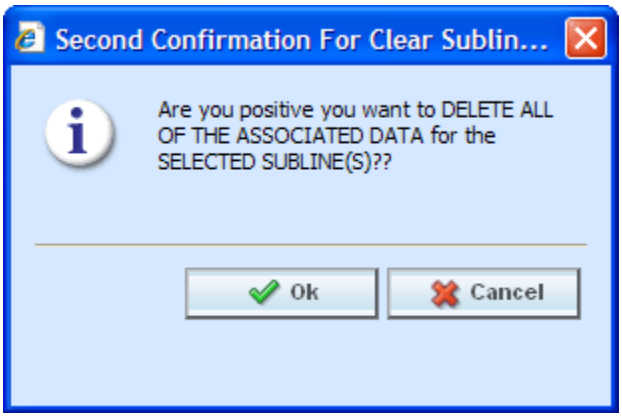


Figure 18 Second Confirmation to Clear the Subline

4. A second confirmation screen is shown. Click OK to clear the subline. After the Program Explorer tab refreshes, the changes are shown. Select **Cancel** to return to the Program Explorer tab without clearing the subline.

Delete

Deleting a subline removes the subline from the system. Everything in the subline, including folders, programs, and data will be deleted.

Deleting a subline should be done only when nothing in the subline is needed. Make sure this is the action you want to take. Once a subline is deleted, there is no undo. You will be asked to confirm your selection twice before the subline is deleted. The default subline in any line cannot be deleted. Any other user created subline or template generated subline can be deleted at any time.

You must have subline management permissions to delete a subline. If the delete subline option is grayed out, you may not have permissions or the subline is the default subline for the line.

Deleting Sublines

1. Select the line of business where you want to delete a subline.

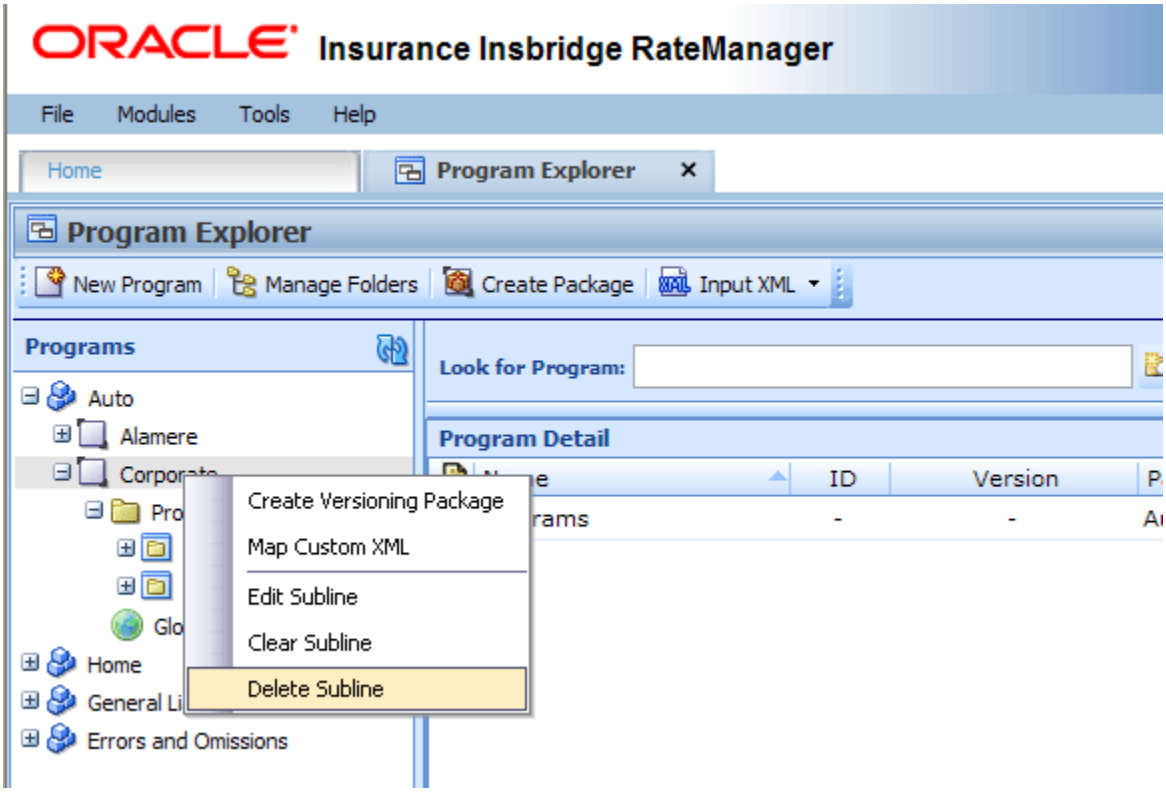


Figure 19 Deleting a Subline

2. Right click and select Delete Subline.

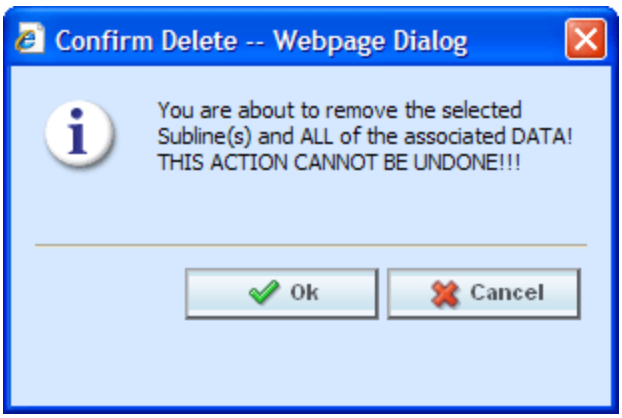


Figure 20 First Confirmation to Delete the Subline

3. Click OK to delete the subline.

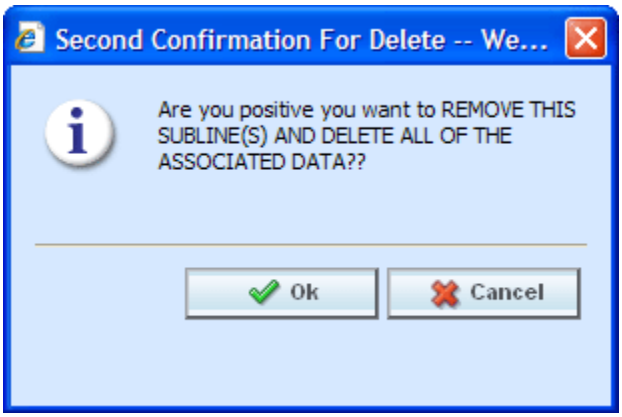


Figure 21 Second Confirmation to Delete the Subline

4. A second confirmation screen is shown. Click **OK** to delete the subline. After the Program Explorer tab refreshes, the changes are shown. Select **Cancel** to return to the Program Explorer tab without deleting the subline.

Chapter 5

FOLDERS

The RateManager file management system uses multiple folders and subfolders (similar to Microsoft Windows Explorer). This is a multi level set up that allows you to place an unlimited number of folders and subfolders underneath a subline. Using folders gives you a tree structure that can make it easier to locate a single program when there are a large number of programs to choose from. There are two types of folders:

- **Subline Folders:** are the standard folders that reside under the subline. These folders are visible at all times. Programs reside under subline folders. At least one subline folder must be created prior to any programs.

- **Program Version Folders:** are optional holding folders that reside under programs. These folders are visible only when a program is present. The program version folder structure is replicated under every program in the subline folder.

Subline Folders

RateManager supports an unlimited number of subline folders and all folders are line of business and subline specific. Subline folders can be edited and moved within the subline where they were created. Each folder can contain multiple subfolders and/or multiple programs.

Subline folders allow you to classify and link programs together. This means you can group related programs underneath a major category and then continue to further define the structure until you reach the level where it no longer makes sense to subdivide.

For example, if you have programs that apply to a certain geographical area, you could create one top tier folder for all these programs. Within this folder you may want to create a subgroup that applies only to a specific region within this geographical area. Within the subgroup you may want to create a smaller subgroup that only applies to certain cities within this specific region. You can create as many folders and subfolders as you want and all these folders will be linked together. There is no limit to the number of folders and subfolders you can create.

Program Version Folders

RateManager supports an unlimited number of program version folders and all program version folders are specific to the subline folder where they were created. Each program version folder can contain multiple subfolders and/or multiple program versions.

The program version folder structure will be replicated in each program created in the subline folder. This means that if you create a program version folder called “archive” under the subline folder “North” then every program you create in the “North” folder will have a program version folder called “archive.”

Program version folders allow you to categorize program versions so you can quickly sort through multiple program versions. For example, if you have a program that had a new program version created each week you could create a program version folder to hold the program versions that were applicable for the first month, a program version for the second month and so on. This would allow you to quickly view the program versions that were for a specific month without having to scroll through a long list of program versions.

Manage Program Folders

Subline folders and program version folders are managed on the Manage Program Folders screen. The Manage Program Folders screen allows you to:

- Create a New Folder
- Rename a Folder
- Delete a Folder
- Create a Versioning Package: see Creating a Global Versioning Package.

Navigating to Manage Program Folders

Subline folders and program version folders are managed the Manage Folders option in the top bar menu on the Program Explorer tab. You must select the line and the subline before the Manage Program Folders screen is shown.

1. In Program Explorer, select the line and then select the subline you need.
2. Click **Mange Folders** to open the Manage Program Folders screen.

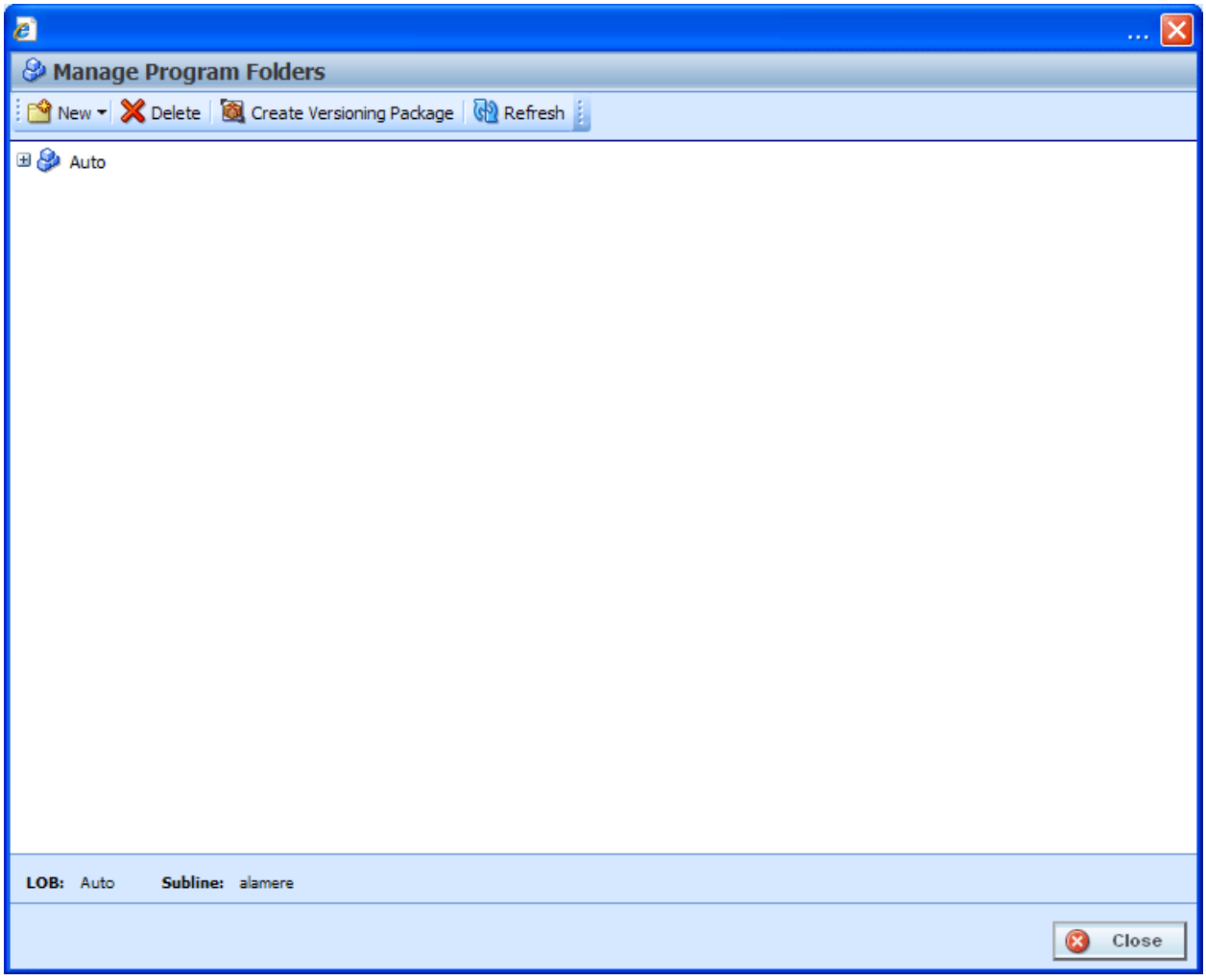
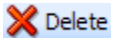
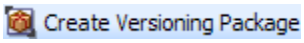
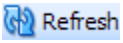


Figure 22 Blank Folders

FUNCTIONALITY

The menu bar at the top of the screen contains the functions you can perform on this screen. If you do not have the rights to a certain function, it will not be displayed. For example, if you do not have the rights to delete a folder, the delete option will not be displayed.

Functions:

	New: Creates a new folder.
	**Delete:** Deletes the currently selected folder.
	**Create Versioning Package:** Creates a global versioning package that is used by SoftRater for automatic version selection. See Creating a Global Versioning Package.
	**Refresh:** Refreshes the screen with the current information.

FIELDS

The Manage Program Folders screen contains all current subline folders and program version folders. Folders expand out into a tree view. The line of business is displayed at the top. Expand the line to see the subline. Expand the subline to see the folders underneath and so on. At the bottom of the screen is an information bar that contains the Line and Subline you have selected.

Right Click Options

Every folder has a right click menu. To view the right click menu options, select the folder you want and right click. The menu options that you can perform will depend upon the type folder selected. The options for a subline folder are different from the options available for a program version folder. Your ability to perform a function depends on your rights. For example, if you do not have the rights to delete a folder, you will receive a message.

Subline Folders will have 4 options:

- New Subline Folder
- Rename Subline Folder
- Delete Subline Folder
- New Program Version Folder

Program Version Folders will have 3 options:

- New Program Version Folder
- Rename Program Version Folder
- Delete Program Version Folder

Program Version Folders cannot have subline folders underneath.

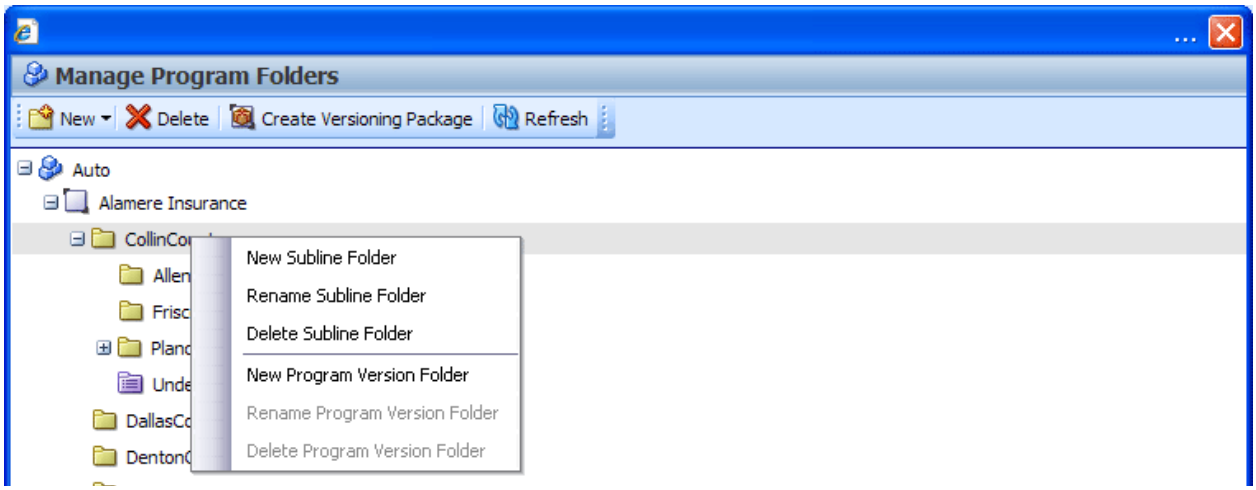


Figure 23 Right Click Menu for Subline Program Folders

Manage Program Folders has six right click menu options:

- **New Subline Folder:** Creates a new subline folder under the folder you selected.
- **Rename Subline Folder:** Allows you to rename the folder.
- **Delete Subline Folder:** Deletes the selected folder. This option may not be active if you do not have rights.
- **New Program Version Folder:** Creates a new program version folder under the folder you have selected.
- **Rename Program Version Folder:** Allows you to rename the folder.
- **Delete Program Version Folder:** Deleted the selected folder, This option may not be active if you do not have the rights.

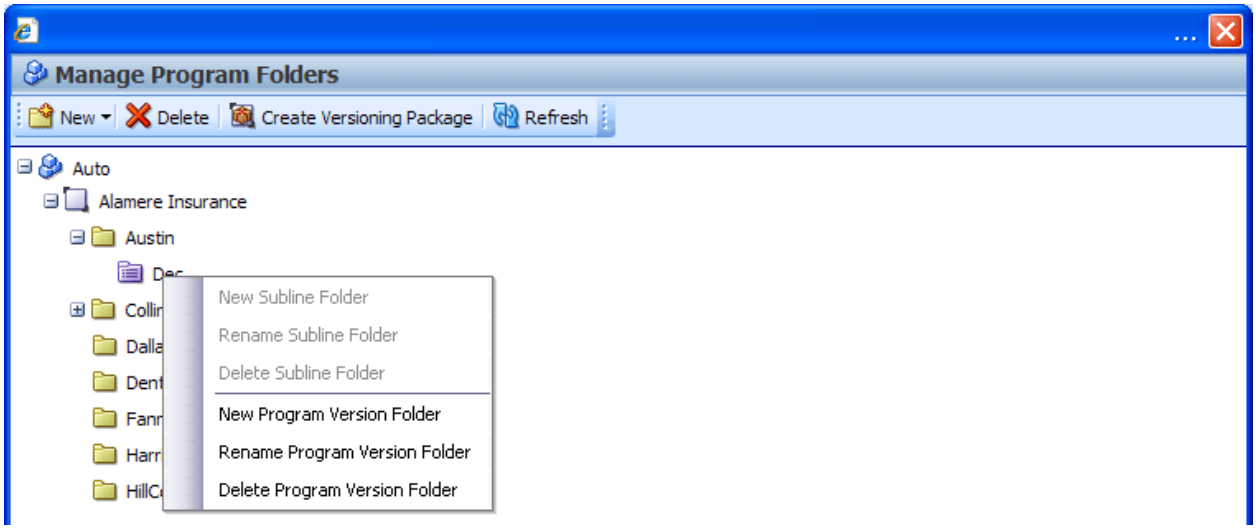


Figure 24 Right Click Menu for Manage Program Version Folders

CREATING A NEW SUBLINE FOLDER

Folders have to be created before programs. If no folders have been created, the Parent folder will be the line of business. The subline will be directly underneath. The first folder created must fall under the subline folder. For any other folder, you can select the folder pathway.

1. Select the subline you want. If available, select the folder where you want to create a new subline folder.

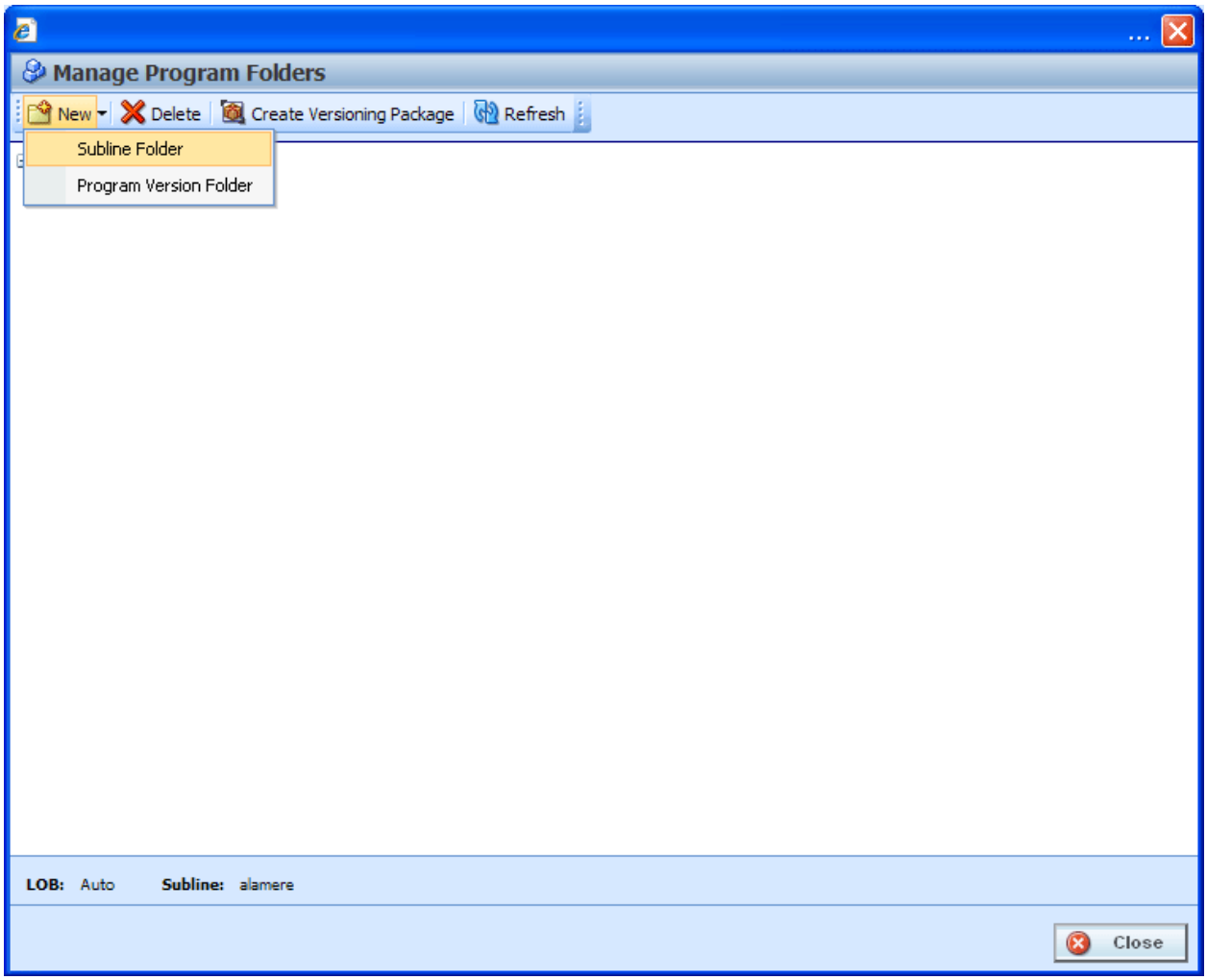


Figure 25 Creating New Folder

2. Select **New→Subline Folder** from the top bar menu or right click and select New Subline Folder from the menu.

3. A blank box is listed under the folder you selected. Enter in a **Name**.

4. Click out of the box to exit the field and save your entry. The screen refreshes and the new folder is displayed in the Manage Program Folders screen.

RENAMING A SUBLINE FOLDER

Folders can be renamed at any time in the Manage Program Folder screen or on the Program Explorer→Edit Folder feature.

1. Select the folder you want to rename and right click.

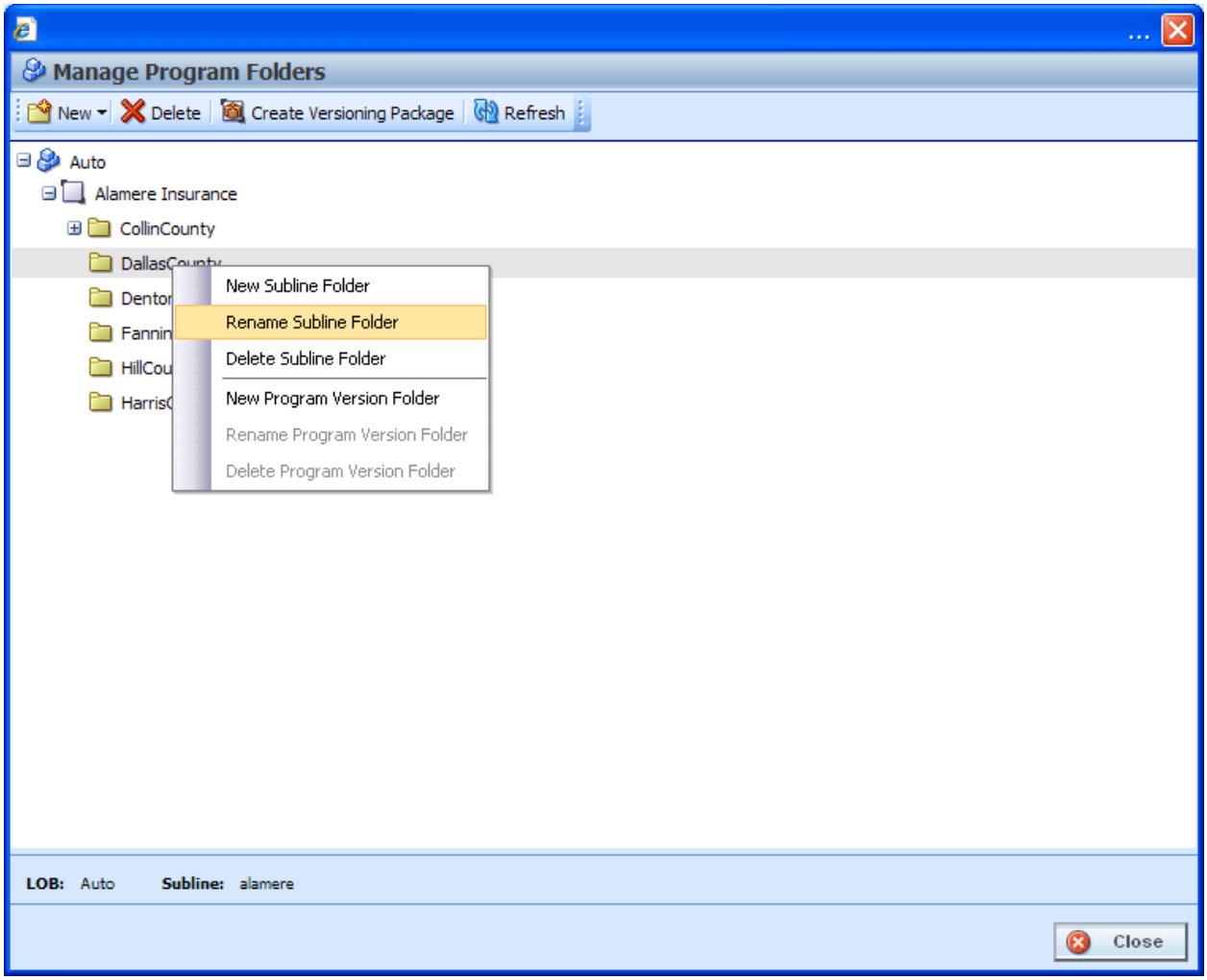


Figure 26 Renaming a Subline Folder

2. Select **Rename Subline Folder** from the menu.

3. The subline folder name is boxed, indicating the field is open for editing. Enter in the new name.

4. Click outside the box to exit the field and save your entry. The screen refreshes and the folder is displayed in the Manage Program Folders screen.

NOTE: *Oracle Insurance recommends that the Folder Name not contain any spaces and that the Folder Names be unique, regardless of the pathway. For example, in Figure 26 Renaming a Subline Folder, no other folder under the Auto line of business, regardless of subline, should be called DallasCounty, the name of the newly entered folder. Names cannot be duplicated within the subline folder level.*

DELETING A SUBLINE FOLDER

If a subline folder is no longer needed, it can be deleted. Make absolutely sure that the programs for the folder are no longer needed. Deleting a folder deletes all programs and program version folders under that folder only. Subfolders and any programs in the subfolders are not deleted but are now unlinked. Folders that are unlinked are no longer accessible or visible in Programs on the left hand side of Program Explorer. Unlinked folders can be viewed in the Manage Program Folders screen.

To access a subfolder whose parent folder has been deleted, you will have to move the subfolder to a visible folder. All visible parent folders are located on the left hand side of Program Explorer. Any subfolders underneath are moved as well. It is recommended that any subfolders either be moved or deleted prior to deleting the parent folder. You also can delete a top tier folder to unlink all subfolders rather than deleting folders.

Deleting a Folder

1. In the Manage Program Folders screen, select the folder you want to delete and right click. Select **Delete** or right click and select **Delete Subline Folder** from the menu.

2. You are asked to confirm deletion of the folder.

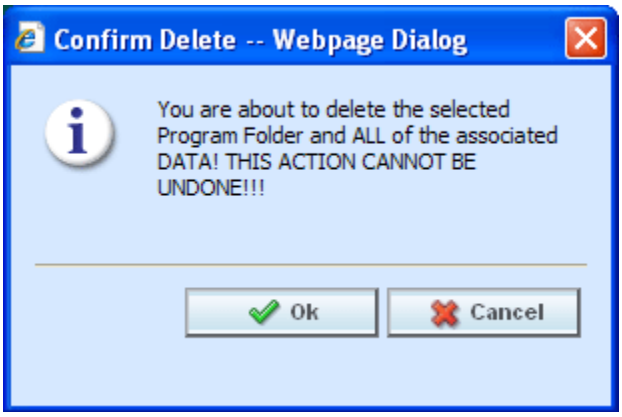


Figure 27 Deleting a Folder

3. Select **OK** to confirm deletion or **CANCEL** to return to the Manage Program Folders screen without deleting the folder.

4. You are asked again to confirm deletion of the folder.

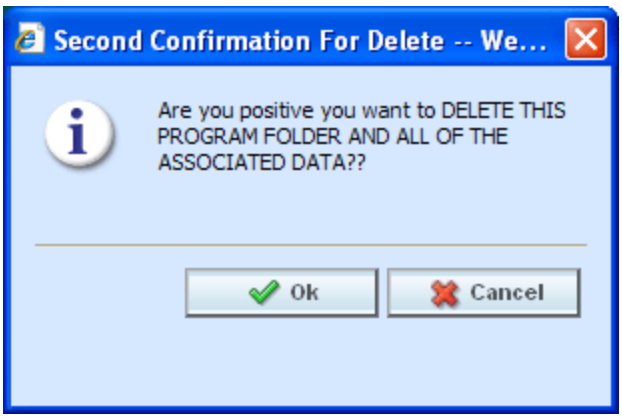


Figure 28 Confirming a Folder Delete

5. Again, select **OK** to confirm deletion. The folder and all associated programs will be deleted. Click **CANCEL** to return to the Manage Program Folders screen without deleting the folder.

EDITING A SUBLINE FOLDER

Editing a subline folder allows you to change the folder name and move the folder to a different location within the same subline. You cannot move a folder outside of the subline where it was created. When you change the pathway of any folder, the folders underneath are changed as well.

On the Program Explorer tab, the Programs area and the Program Detail area both have right click menus containing subline folder options. The Edit Folder option is only found in the right click menus on the Program Explorer tab.

Program Version Folders names can be edited on the Manage Folder screen only.

To Edit a Folder Name

1. In the Program Explorer tab, select the folder you want to edit and right click. Select **Edit Folder**.

Figure 29 Folder Options Found on the Right Click Menu of Programs

2. The **Edit Folder** screen is shown.

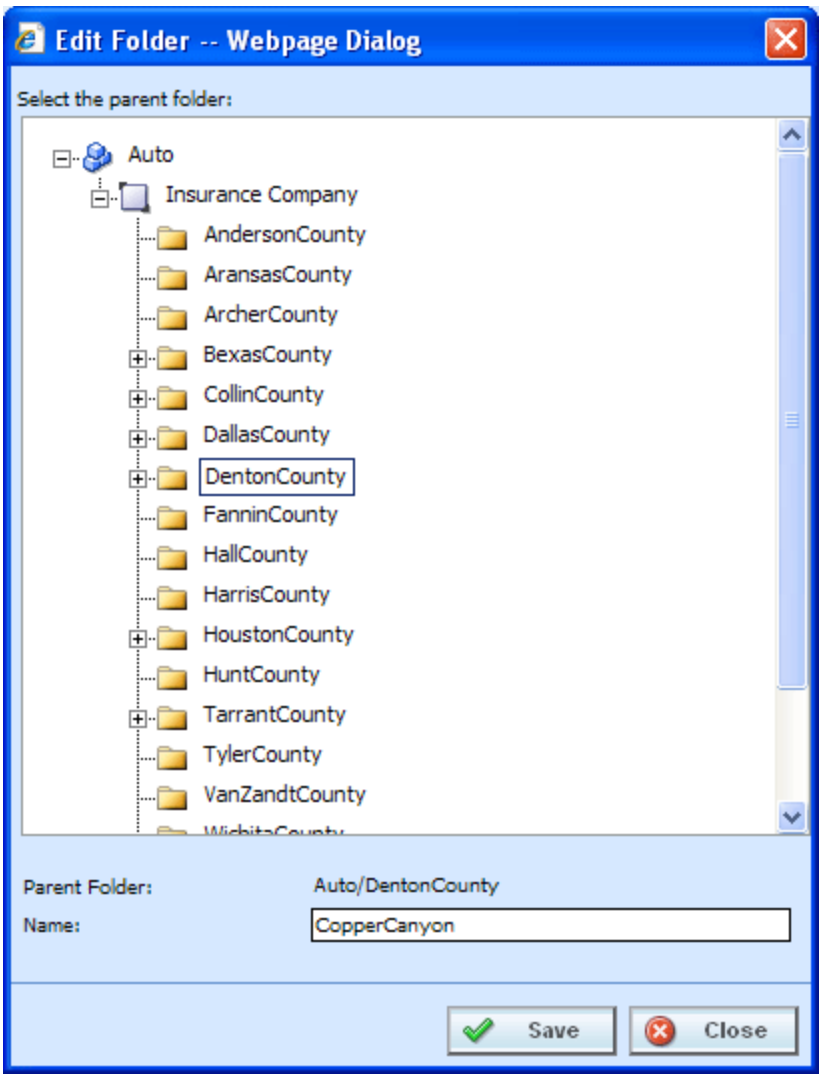


Figure 30 Edit Folder

3. Make your changes and click **SAVE**. The Edit Folder screen closes and the Program Explorer tab refreshes with the changes you made. Click **CLOSE** to go back to the Program Explorer tab without saving changes.

MOVING A SUBLINE FOLDER

Moving a subline folder allows you to change the folder location within the same subline. You can move any folder either up or down the folder structure. When you move a folder, all associated programs and subfolders are moved as well. There is no limit to the number of times a folder can be moved. Moving is performed on the Edit Folder screen.

Program Version Folders cannot be moved.

To Move a Folder

1. In the Program Explorer tab, select the folder you want to move and right click. Select **Edit Folder**.

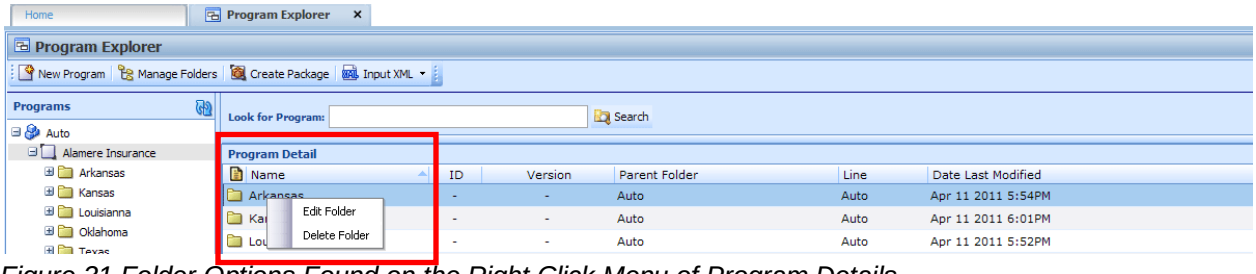


Figure 31 Folder Options Found on the Right Click Menu of Program Details

2. The **Edit Folder** screen is shown. The folder you have selected to move is displayed in the Name field but not in the tree structure. Double click the destination folder where you want to move to. The Parent Folder field reflects the new path for the folder.

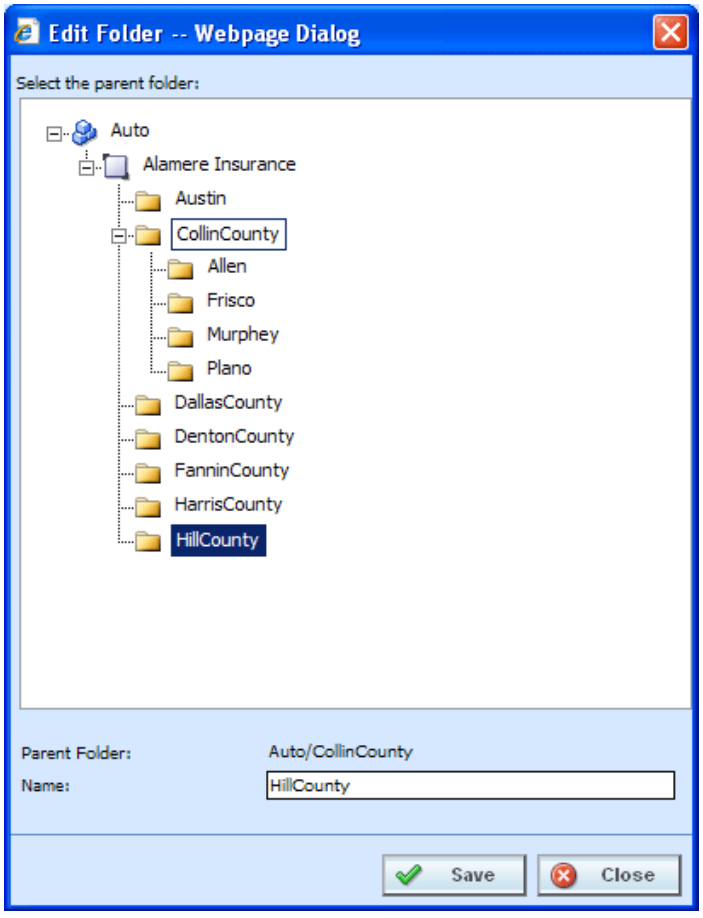


Figure 32 Moving a Subline Folder

3. If this is correct, click **Save**. The Edit Folder screen closes and the Program Explorer tab refreshes with the changes you made. Any subfolders are moved as well. Click **Close** to go back to the Program Explorer tab without saving changes.

Creating a New Subline Folder

A new subline folder also can be created using the right click menu. On the Program Explorer tab, the Programs area has a right click menu containing subline folder options. You cannot create the first subline folder using this option. This option can be used only after a subline folder has been created in the Manage Folders area.

Program Version Folders names can be created on the Manage Folder screen only.

1. In the Program Explorer tab→Programs area right click any folder in the line of business→Subline you want. Select **New Folder** and the New Folder screen is shown.

2. Select the folder pathway. The pathway is displayed in the Parent Folder field. On the tree view, the final destination where the new folder will be placed will have a box around it.

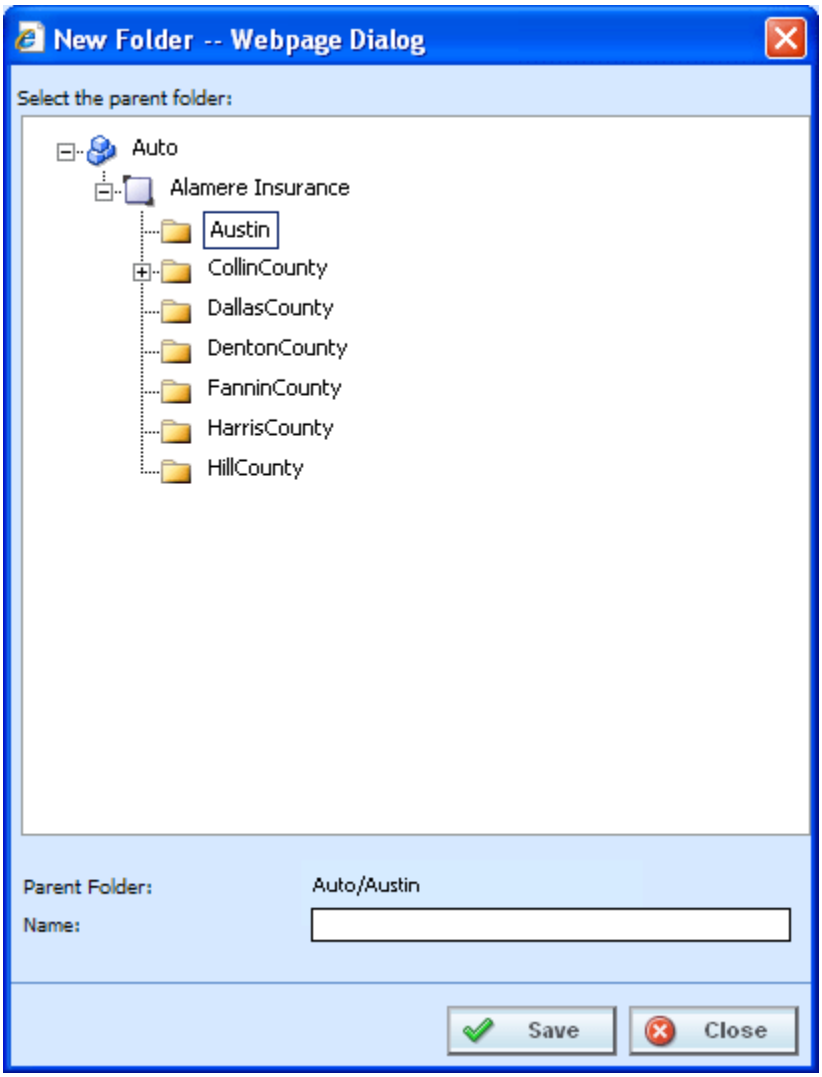


Figure 33 Creating New Folder

3. Enter in a **Name**. Click **Save** to save your folder. The screen refreshes and the new folder is displayed in the Program Explorer tab.

CREATING A NEW PROGRAM VERSION FOLDER

Program Version Folders can be created only on the Manage Program Folders screen. At least one Subline folder has to be created before a Program Version Folder can be created. Program Version Folders are listed in alphabetical order.

1. Select the line of business and the subline you want. Select the subline folder where you want to create a new program version folder. Make sure this is where you want the folder. Program Version folders cannot be moved.

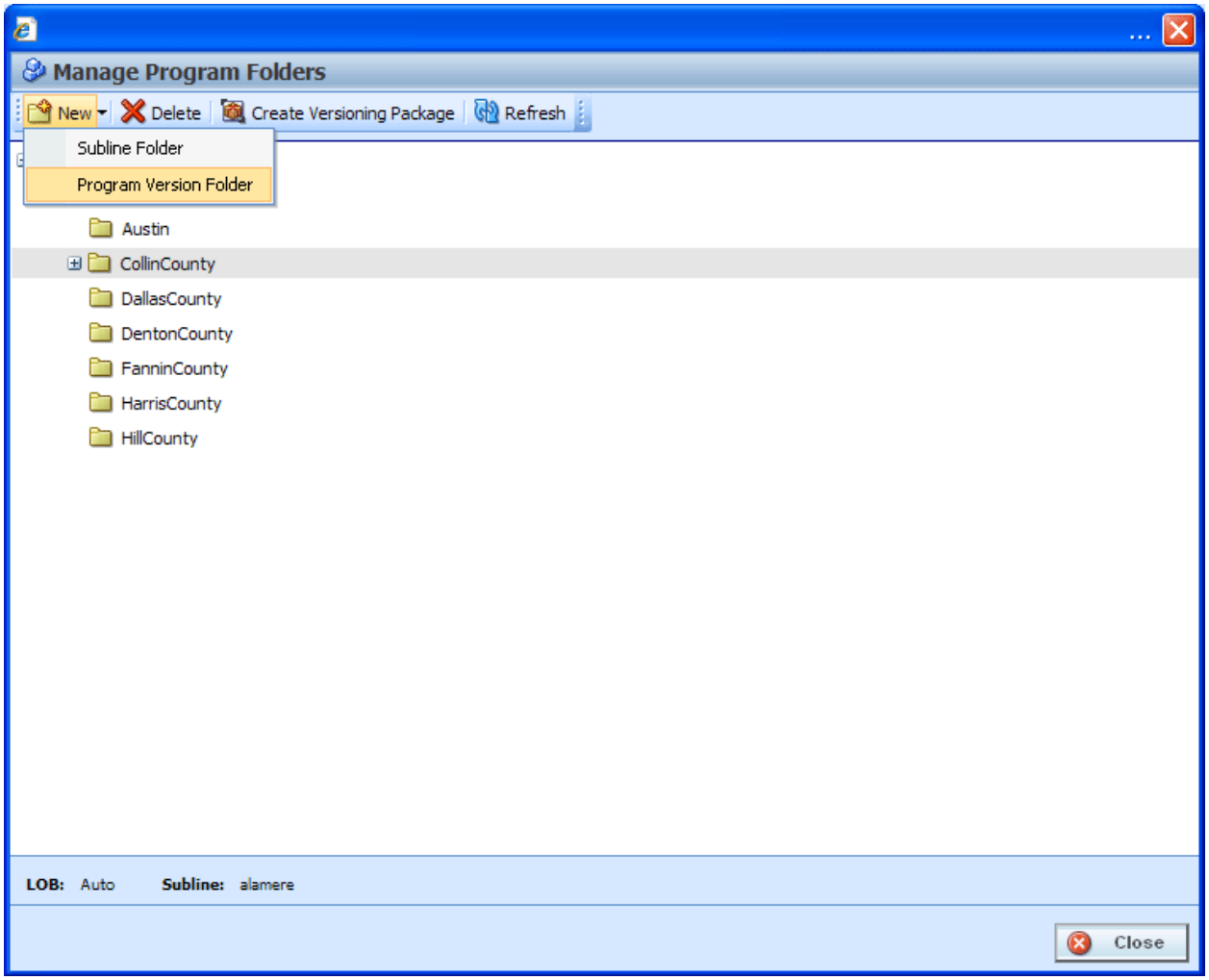


Figure 34 Creating New Program Version Folder

2. Select **New→Program Version Folder** from the top bar menu or right click and select New Program Version Folder from the menu.

3. A blank box is listed under the folder you selected. Enter in a **Name**.

4. Click out of the box to exit the field and save your entry. The screen refreshes and the new folder is displayed in the Manage Program Folders screen.

Program Version Folders are displayed under programs. New Program Version folders may not be displayed on the Program Explorer tab until a program has been created at the same level.

RENAMING A PROGRAM VERSION FOLDER

Program Version Folder can be renamed at any time in the Manage Program Folder screen.

1. Select the program version folder you want to rename and right click.

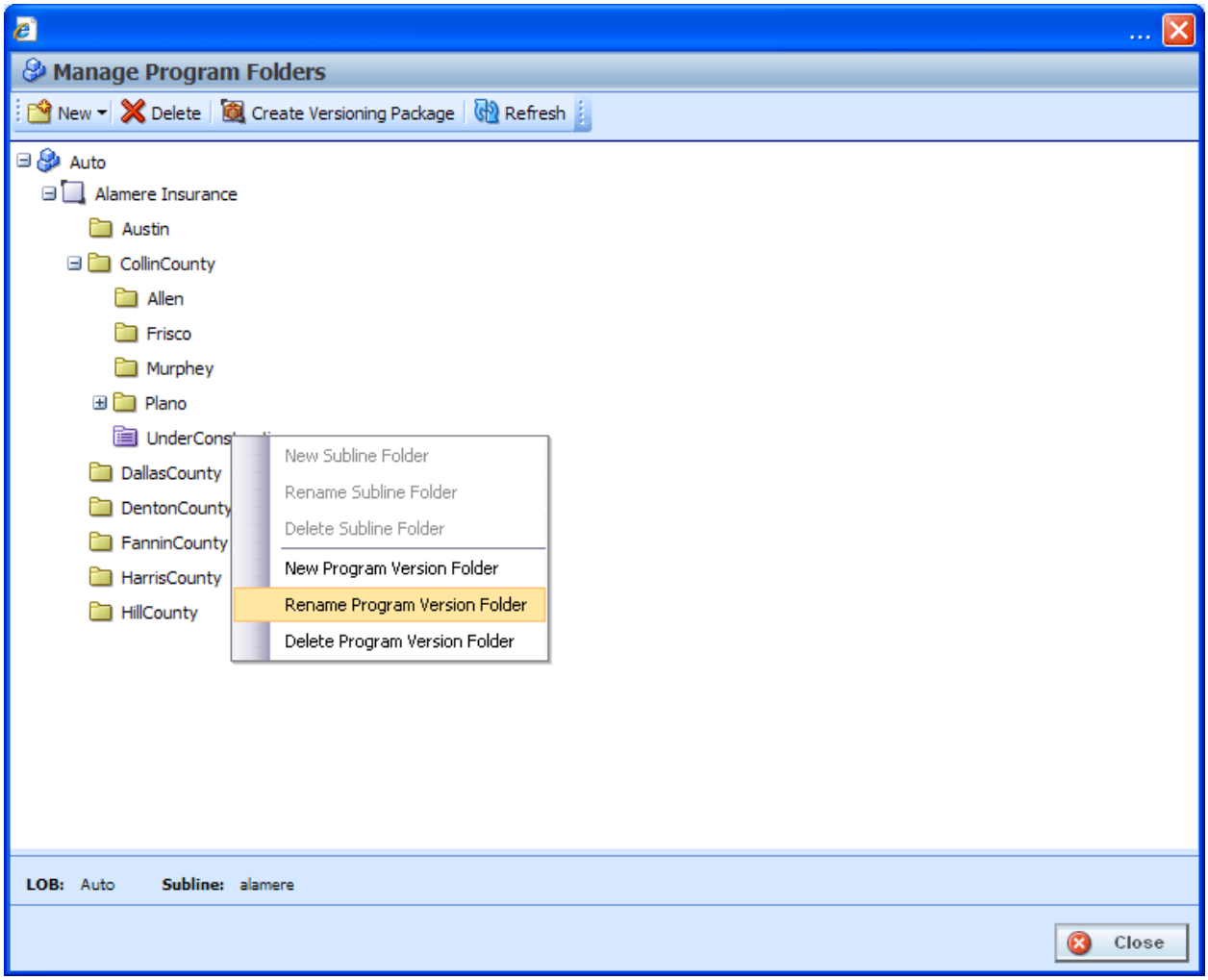


Figure 35 Renaming a Subline Folder

2. Select **Rename Program Version Folder** from the menu.

3. The program version folder name is boxed, indicating the field is open for editing. Enter in the new name.

4. Click out of the box to exit the field and save your entry. The screen refreshes and the folder is displayed in the Manage Program Folders screen.

NOTE: *Oracle Insurance recommends that the Folder Name not contain any spaces and that the Folder Names be unique, regardless of the pathway. Names cannot be duplicated within the subline folder level.*

DELETING A PROGRAM VERSION FOLDER

If a program version folder is no longer needed, it can be deleted. Be aware that when you delete a folder does, programs do not get deleted but any program version subfolders are removed.

Deleting a Folder

1. In the Manage Program Folders screen, select the folder you want to delete and right click. Select **Delete**.

2. You are asked to confirm deletion of the folder.

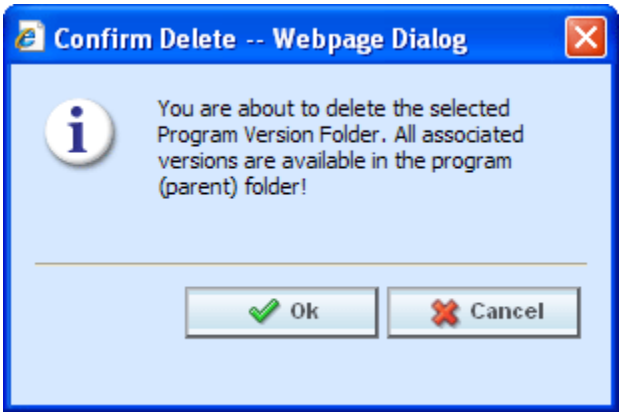


Figure 36 Deleting a Program Version Folder

3. Select **OK** to confirm deletion or **CANCEL** to return to the Manage Program Folders screen without deleting the folder.

4. The folder and any program version subfolders will be deleted.

PROGRAMS

Programs in RateManager typically correspond to rate manuals. For example, if you had rate manuals for Texas and Florida auto, then you could have corresponding RateManager programs for Texas and Florida under the auto line of business. When a rate change occurred, you would create a new version of the appropriate program.

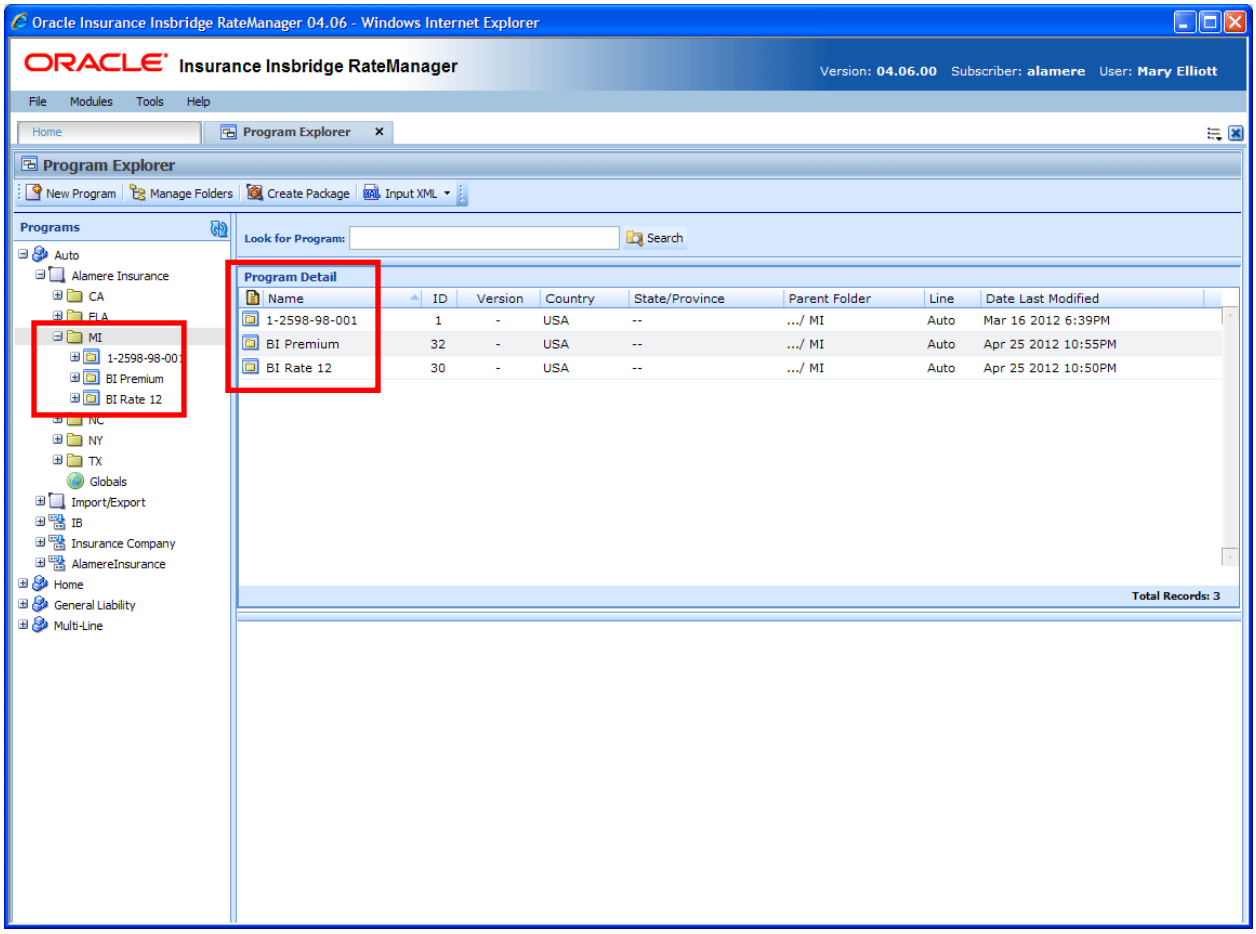


Figure 37 Programs on Program Explorer

Programs are created and managed in Program Explorer. Programs are displayed in the Programs area when you expand a folder. Programs are listed in the Program Detail area when you select a folder. From either area you can:

- Create a New Program
- Move a Program
- Delete a Program
- Edit a Program
- Manage Version Criteria
- Run a Program Version Report, and Program Difference Reports.

There are two types of programs:

Standard Programs	These are programs that you created. Unless locked, you can add, edit or delete any item from this program.
Template Programs	These are programs that were created from a template. Template programs automatically have variables, algorithms and driver assignments locked. These items cannot be edited or deleted. You can add items and create revisions. Any globals associated with a template are locked as well.

Sublines can contain both standard and template type programs, except for the default subline. The default subline will only contain standard programs. You will not be allowed to apply any template programs into your default subline.

RateManager supports an unlimited number of programs and all programs are subline specific. For example, creating **Program 1** for **Carrier A** under the default subline does not create **Program 1** for **Carrier A** under another subline.

Creating a New Program

New programs can be added at any time to any folder. Template created sublines can have standard programs added to them. There is no limit to the number of programs you can enter.

1. In Programs, select the subline and folder where you want to create a new program.

2. Click **New Program** from the top bar menu or right click and select **New Program**. The **New Program** popup opens, allowing you to enter the program name, select a locale, select a date mask, decimal symbol, digit grouping symbol and select a country and state/province.

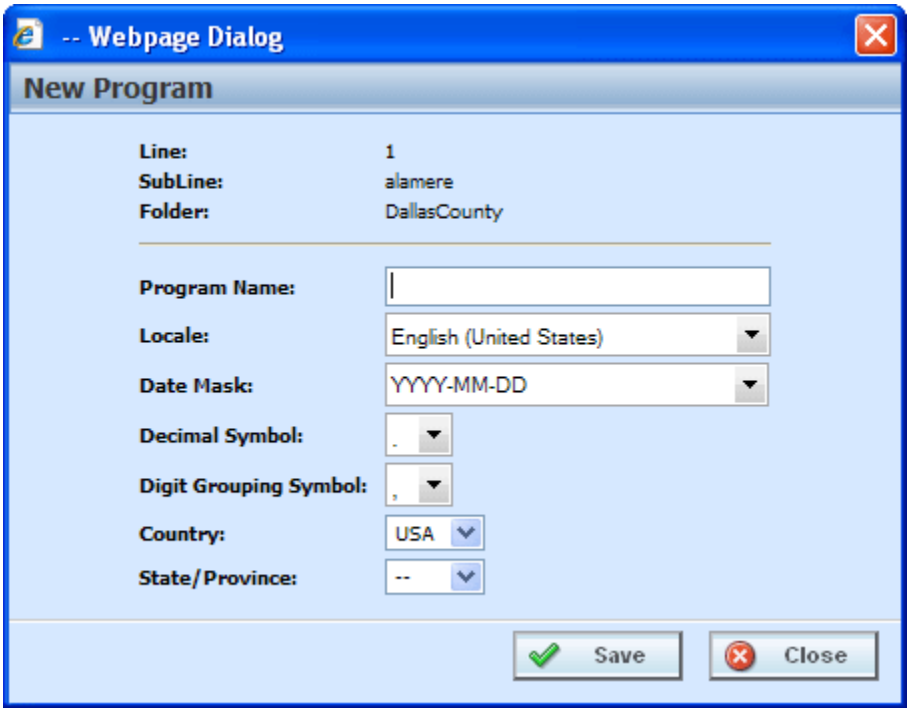


Figure 38 Creating a New Program

3. Click **Save** to save your entry and close the popup. The screen refreshes with the program information you entered. If you double-click on the new program name, you will see that **Version 1** has been created for you.

The Locale, Date Mask, the Decimal Symbol and Digit Grouping Symbol are automatically filled with the defaults from the line of business (LOB). The values set at the LOB apply as the defaults to every program created in the line regardless of subline. The program can select a different locale if necessary. For more on local, decimal and digit grouping symbols please see RateManager Constructs.

WARNING: *Changing date and number formats may result in programs not running properly. Global variables that have been created as one type of date and number format may not function as expected with another date and number format. Date and number formats should be consistent through the program.*

Moving a Program

You can move a program to any folder under the same subline where the program is located. Moving a program moves the program and all versions. Program moves can be done from the Programs area or the Program Detail area.

To Move a Program

1. Select the program you want to move.
2. Right click and select **Move Program**. A **Move Program** screen is shown.

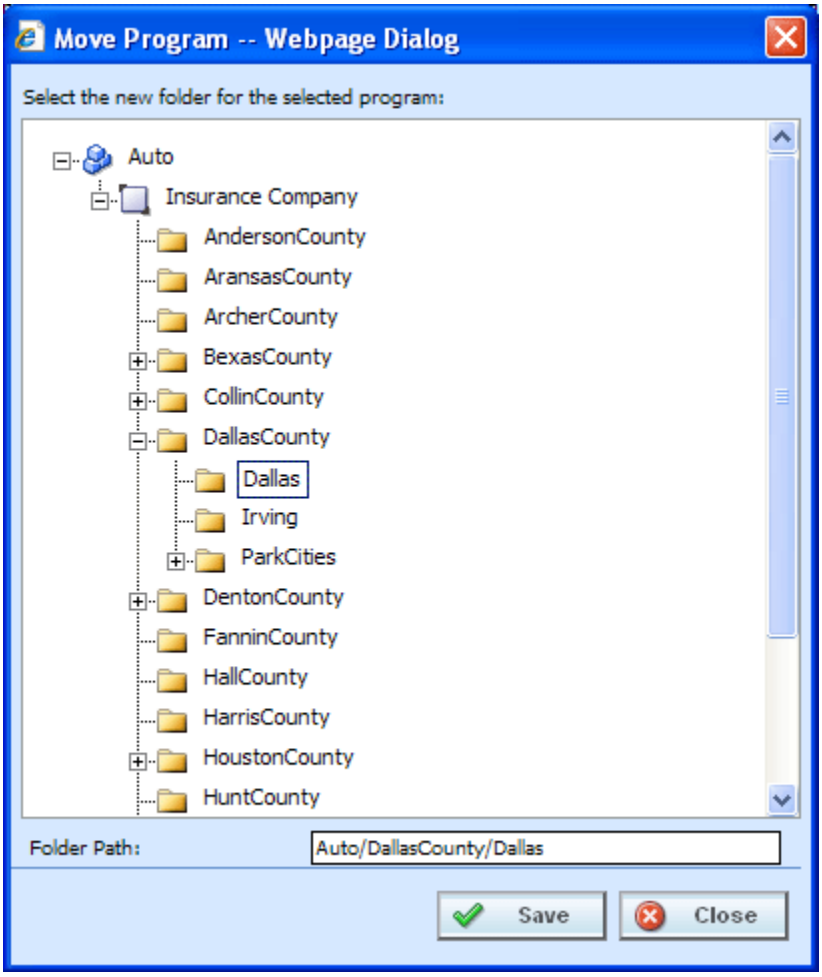


Figure 39 Selecting Destination for Moving a Program

3. The Folder Path at the bottom of the popup displays the current location of the program. Click the folder where you want to move the program to. The Folder Path reflects the final destination for the folder.
4. When you have the program in the correct folder, click **SAVE**. The screen refreshes and the program will be moved to the selected folder.

Editing a Program

Program information can be edited at any time. Use the Program Properties option when you want to change the name, date mask, country or state/province of a program or select which inputs are to be used for program version selection.

1. Select the program you want to edit and right click and select **Porgram Properties**.

2. This opens the **Edit Program** screen where you can change the program name, locale, date mask, decimal, digit, country, or state/province. You also can add version selection criteria.

3. When you have finished click **Save** to save your changes. Click **Close** to close the Edit Program screen and return to Program Explorer.

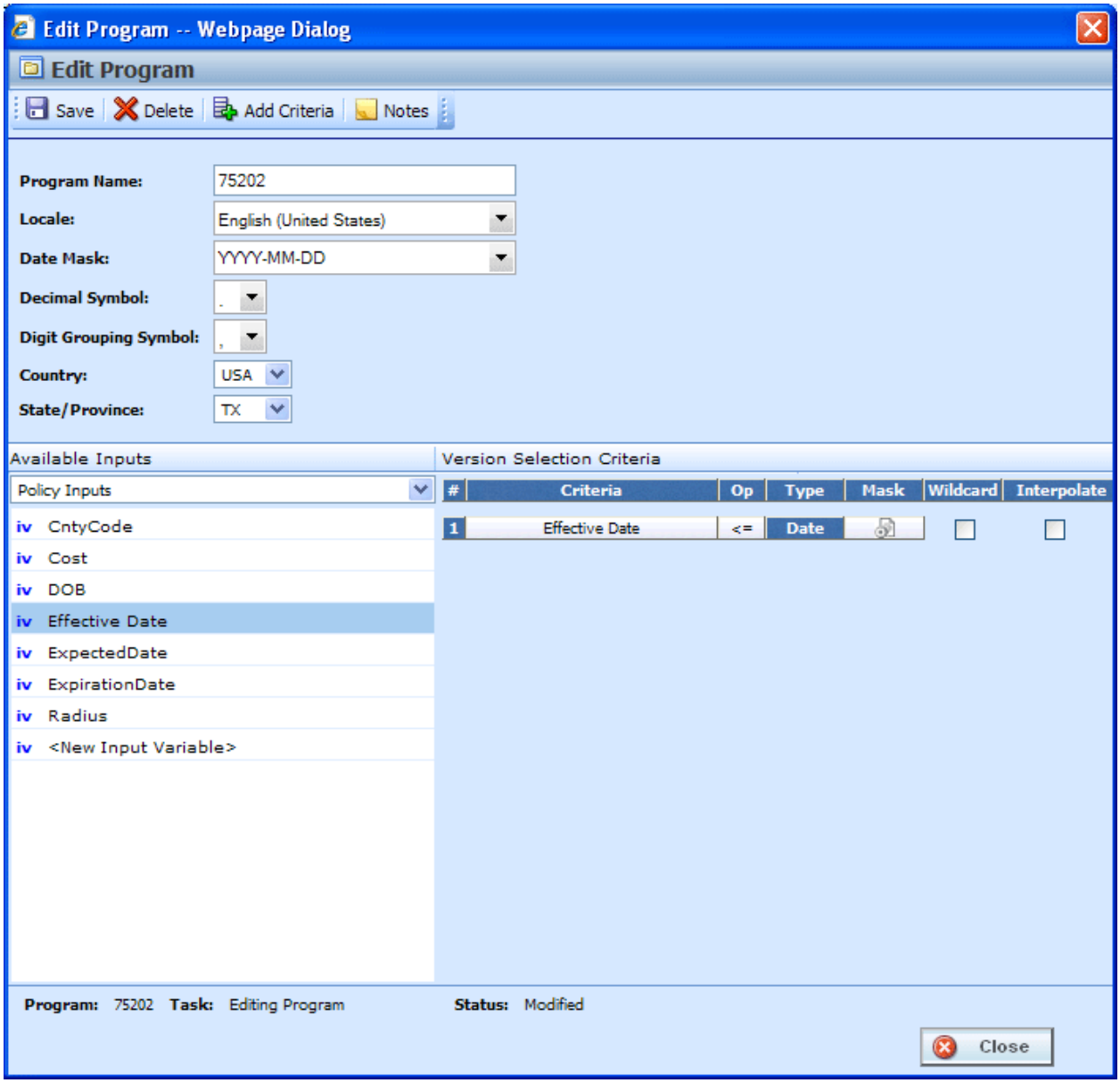


Figure 40 Editing a Program

Deleting a Program

If a program is no longer needed it can be deleted. Make absolutely sure a program is no longer needed before deleting it. When a program is deleted, all data (variables, algorithms, sequencing, result groups and, if an auto program, driver assignment scenarios) and versions are deleted.

NOTE: *Program deletion cannot be undone.*

To Delete a Program

1. Select the program you want to delete.
2. Right click and select **Delete**. You must confirm the deletion of the program.

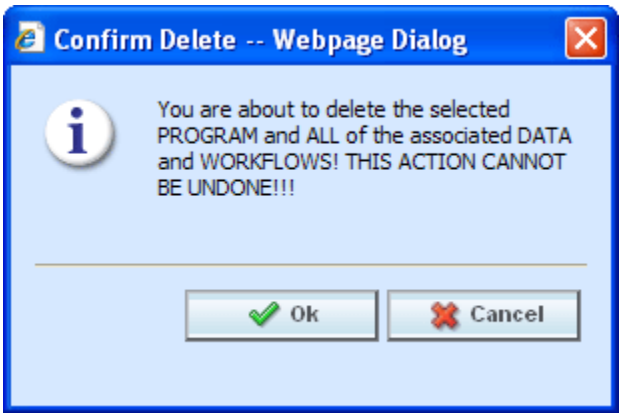


Figure 41 Delete Warning Message

3. Select **Ok** to confirm deletion or Cancel to return to Program Explorer without deleting the program.
4. You must confirm again that you want to delete the program.

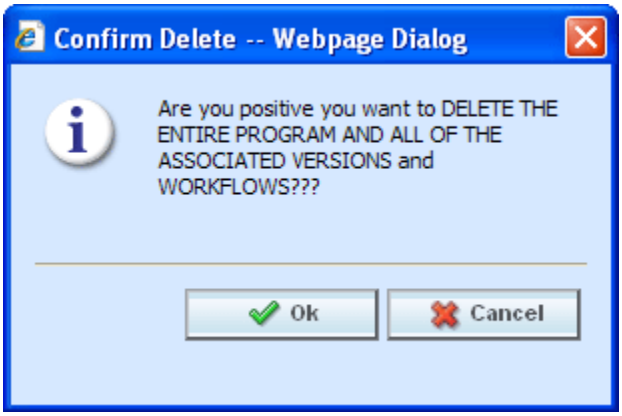


Figure 42 Confirming Delete

5. Select **OK** to confirm deletion. The program and all associated versions are deleted. Click Cancel to return to Program Explorer without deleting the program.

VERSIONING CRITERIA

Versioning Criteria is used when you want to define which version of a program you want to use based on a policy level input. For example, if you have a program with three versions, you can select which version to use by the effective date (a policy level input). You can use version one if the effective date is this month. Version two can be used if the effective date is next month and version three can be used for any other date.

Setting up versioning criteria is a two step process:

Step 1: At the program level, select the input criteria you want to use. This is the input that determines which version of the program should be used.

Step 2: At the program version level, you enter the defining parameters of the input.

If you want to use this feature, you must create a global versioning package. A global versioning package allows for version criteria to be viewed at the program level. Please see Creating a Global Versioning Package for more information.

NOTE: *Only Policy level inputs can be used as Version Selection Criteria*.

FUNCTIONALITY

The **Menu Bar** at the top of the screen contains the functions you can perform on this screen.

Functions:

Save	**Save:** Saves your entries.
Delete	**Delete:** Deletes the currently selected input criteria.
Add Criteria	**Add Criteria:** Adds the selected input as criteria.
Notes	**Notes:** Allows you to enter a note. Please see Notes for more information.

FIELDS

The Edit Program screen contains the program information in the top portion of the screen and the versioning criteria in the lower portion of the screen. There are three fields in the main body of the screen. There is also an information bar at the bottom of the screen.

Program Information

Program Name: Name of the program. This field can be edited at any time.

Locale: The locale used in the program.

Date Mask: The date mask used by the program. For more information on date masks, please see Date Masks.

Decimal Symbol: The decimal symbol to be used in the program.

Digit Grouping Symbol: The digit grouping symbol to be used in the program.

Country: The country where this program applies.

State/Province: The state or province where this program applies.

Versioning Criteria: Available Inputs

The inputs available for selection are listed. You also can create a new policy level input by clicking <New Input Variable>. Please see Adding a New Input from Another Area for more information.

Versioning Criteria: Version Selection Criteria

#: Sequential order of criteria selected from **Available Inputs**.

Criteria: Displays the name of each input selected as criteria for this program.

Op (operator): Determines how the data in the table is used. The default operator is an equals sign (=). To change the operator, select the current operator, right click and choose a new operator. See Comparison Operators for more details.

NOTE: *Arithmetic comparison functions such as < and > cannot be used on string values. Only the operators of equal and not equal are available for string variables.*

Type: Shows the data type of the criteria. The type of data in the input must match that of the criteria or an error will occur.

Mask: Determines how the data being passed into the program should be interpreted by allowing you to hold, remove or replace characters being passed. (For example: If you only wanted to accept the first, second and third characters of a VIN number being passed, this feature adds the ability to hold these characters and disregard the rest.) Click the icon to set the mask. See Masking for more information.

Wildcard: A check in this field tells the system that one or more rows will accept any value passed for these criteria. Exact matches are not required. See Wildcard for more information.

Interpolate: A check in this field instructs RateManager to use interpolation to determine the correct value for the table variable. See Interpolation for more information.

Information Bar

At the bottom of the screen is an information bar that contains the program name and the task you are performing.

Right Click Options

The Criteria and Op fields have a right click menu. To view the right click menu options, select the field you want and right click. All menu options are displayed.

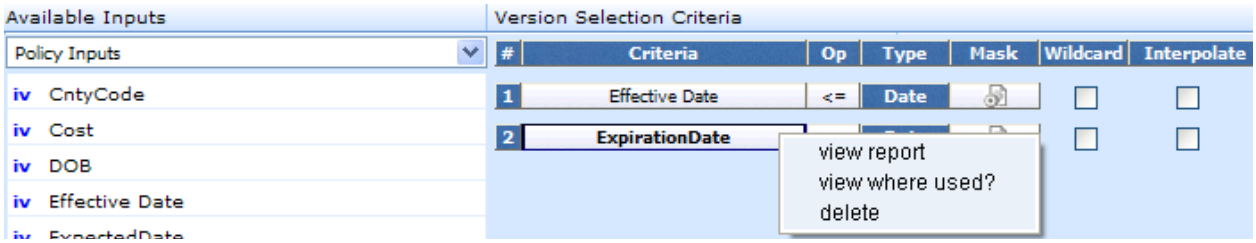


Figure 43 Right Click Menu for the Setting Versioning Criteria

The **Criteria** column has three right click menu choices:

- **View Report:** Displays Input information; XML Input ID, Type, and Category.
- **View Where Used:** Displays the View Where Used report. Please see View Where Used for more information.
- **Delete:** Deletes the selected criteria.

The **Op** column has six right click choices:

- **Equals**
- **Not equals**
- **Less than**
- **Less than or equal to**
- **Greater than**
- **Greater than or equal to**

Setting Versioning Criteria

1. Select the input you want to use from the listing of **Available Inputs**. You can either select the input and click **Add Criteria** or double-click the input. The input is displayed in the Version Selection Criteria area.

2. Set the comparison operator to be used when interpreting data by right clicking the operator box in the Op column (the default is an equals sign =). See Comparison Operators for more information.

3. Make your entries if you want to enter a mask, wildcard or interpolate.

4. Click **Save** to save your work. Click **Close** if you are finished entering criteria.

Deleting Versioning Criteria

1. To remove an input as criteria, click on the name in the Version Selection Criteria listing and select **Delete** from the menu bar or right click the criteria and select Delete from the popup menu.

2. Click **Save** to save your work. Click **Close** if you are finished editing criteria.

PROGRAM VERSIONS

Versioning is handled at the program level. When a new version of a program is created, it is initially a pointer to all elements in the last version of the program. When a change is made to an element in that version, it can be made version specific or applied to multiple versions.

Each program created in RateManager automatically starts at Version 1. When you create a program, version 1 is created at the same time. New versions of a specific program can be created at any time. Usually new program versions are created to correspond to a rate change.

Under a program, all versions contain the same variables, algorithms, sequencing, mappings, and globals. Versions differ when you select different versions of these elements. For example, under Program A, you have two program versions. In version 2, you have changed a table variable to use version 2 of that table variable and you changed an algorithm to use version 4 of that algorithm. Only program version 2 will change. The version 1 will continue to use the versions they were using. These same variables and algorithms are in both program versions, but by selecting different versions of these elements, you have changed program version 2.

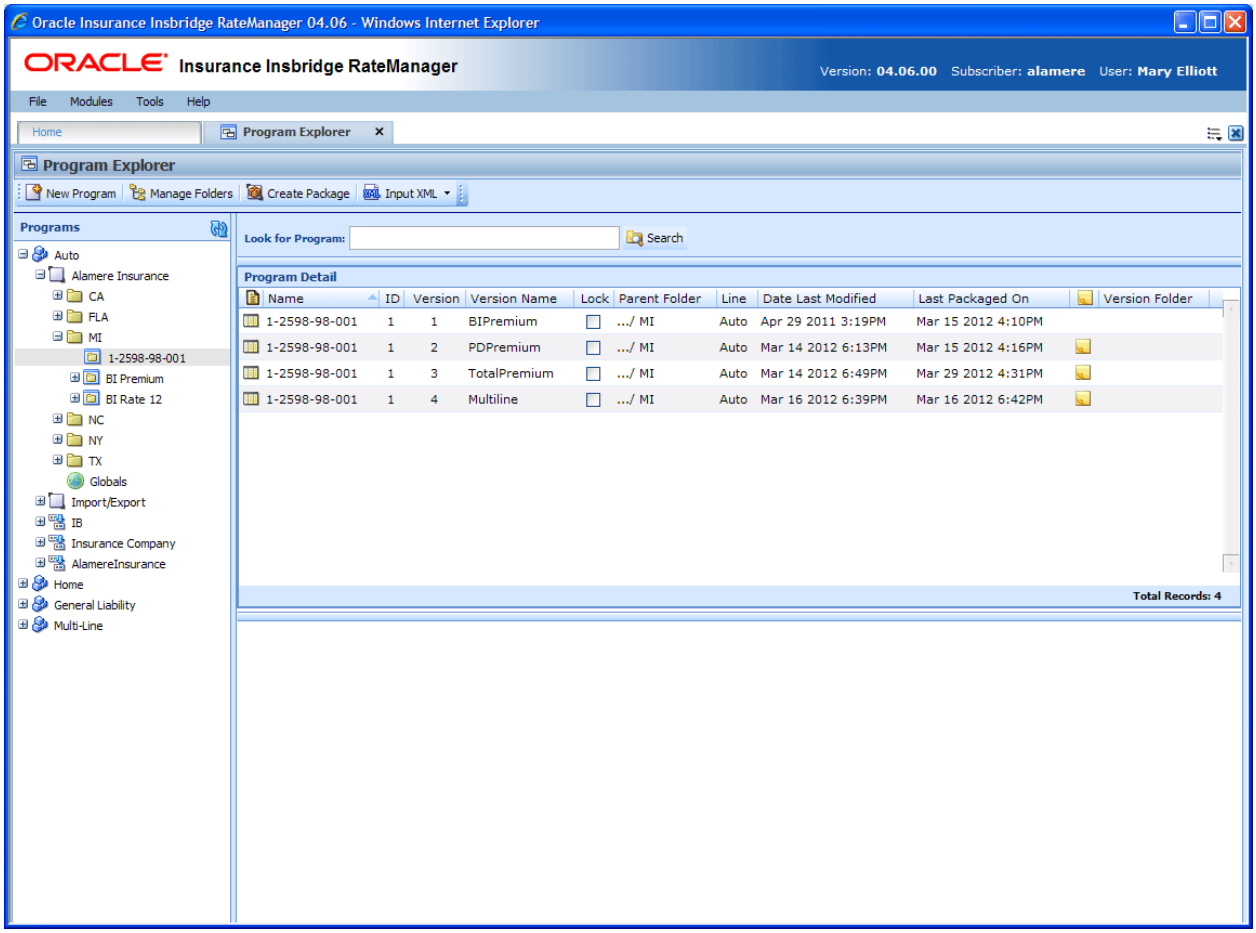


Figure 44 Program Versions in Program Explorer

Program versions are created and managed in Program Explorer. Program versions are listed in the Program Details area when you select a program. From here you can:

- Create a New Program Version
- Copy a Program Version
- Delete a Program Version
- Edit a Program Version
- Manage Versioning Data
- Assign program versions to Program Version Folders
- Unassign program versions to Program Version Folders
- Test Program, please see Test Program
- Map Callouts, please see Callouts
- Map Custom XML, please see Input and Output Mapping
- Notes, please see Notes
- Run a Program Version Report, please see Program Version Report
- For Template programs you will be able to run a Reconciliation Report, please see Reconcile

PROGRAM VERSION TYPES

Program versions can be created by you under a standard program or under a template generated program. Program versions can also be brought in under a template generated program. Different icons can help you to visually identify the program versions that were applied from a template from the ones that you created.

User Created: Designates a program version that was created by you. User created program versions can be created by you, imported, or revisioned from a template program version. Most often, user created program versions are displayed in the default subline, but may be present if you create a new program version in a template generate program.

Template Created: Designates a program version that came from a template. Template created program versions also can be displayed under copied template generated programs. Template created program versions are displayed in template generated sublines.

When you copy a template generated program, version 1 is displayed with a template created icon. This is to designate that the program and version 1 were created from a template. A copied template generated program can accept additional versions of the program that may be entered in the library. You can create a new program version underneath that is displayed with a user created icon. You also can apply another template version from the library, which will be displayed with the template created icon.

Copied template program versions are displayed with a user created icon. This is to designate that the program version was not applied from a template but user created. Even though this program version is user created, template rules will still apply. Template created program versions automatically have variables, algorithms, and driver assignments locked. These items cannot be edited or deleted. Any globals associated with a template are locked as well. You can add items and create additional versions. User created program versions that were built by you are open for editing, deletion or moving, unless locked.

Template generated sublines can contain both user created and template created program versions. Default sublines can only contain user created program versions. In template generated program versions, the name is not open for editing. All other items can be edited as needed.

Creating a New Program Version

New program versions can be added at any time. There is no limit to the numbers of program versions you can enter.

1. In Programs, select the subline and folder that contains the program where you want to create a new version.

2. Double-click the program. All versions of the program are displayed in the Program Detail area. For newly created programs, there is only one version.

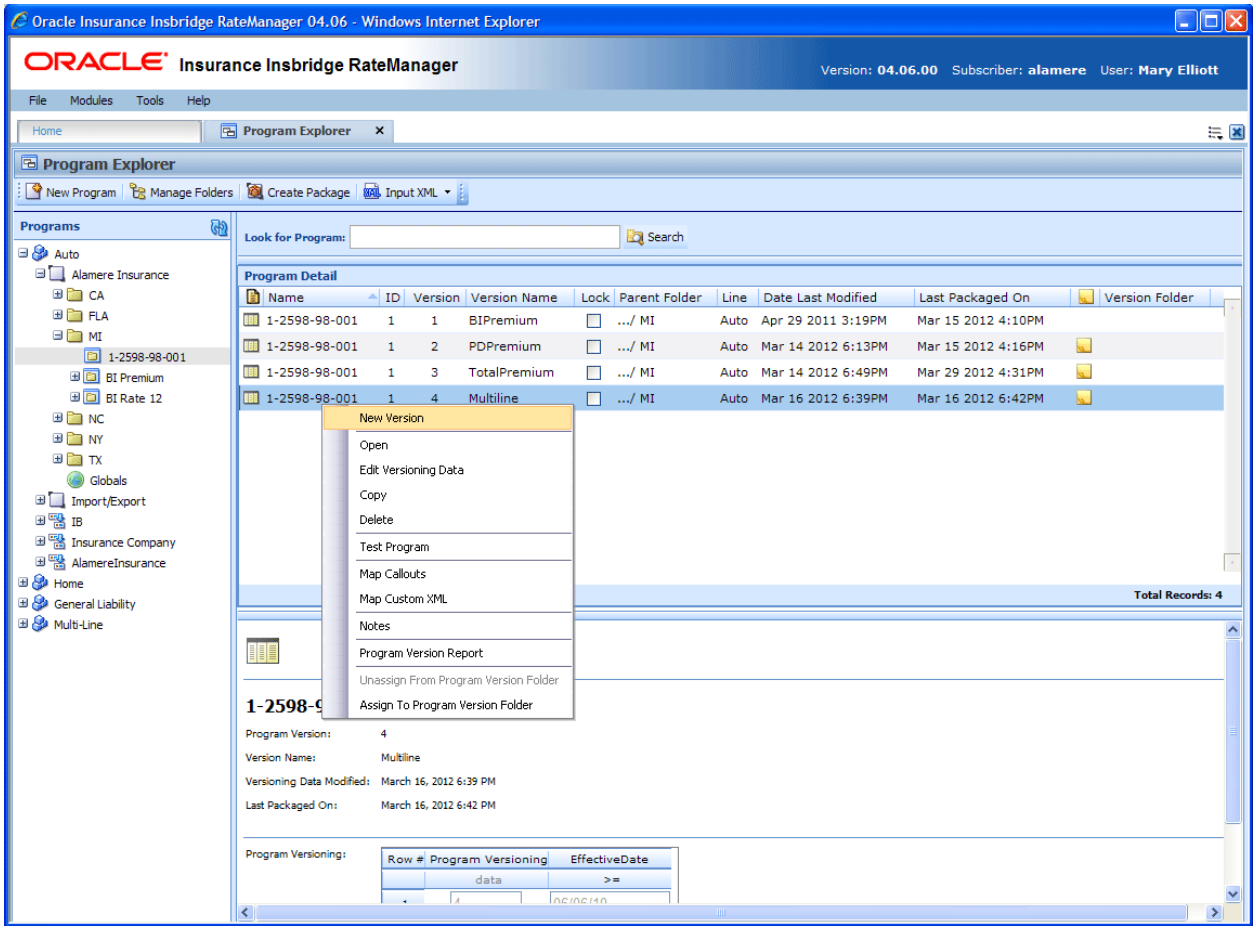


Figure 45 Adding a New Version

3. Select the version you want the new version to be based on. Right click and select **New Version**. The version is copied as the next available version number. Refresh the screen to view the new version.

NOTE: *When a new version of a program is created it is initially a pointer to all elements in the last version of the program. When a change is made to an element in that version, it can be made version specific or applied to multiple versions.*

Copying a Program Version

You can copy a program version at any time within the same subline. Program versions can be copied to any folder under the subline where the program is located.

To Copy a Program Version

1. In Programs, select the subline and folder that contains the program with the version you want to copy.
2. Double-click the program. All versions of the program are displayed in the Program Detail area. For newly created programs, there is only one version. Select the version you want to copy.
3. Right click the version and select **Copy**. This opens the Copy Program popup.
4. Enter the new program name and select the folder where you want the new program copied to. You also have a choice to either copy only the definitions or the definitions and all data.

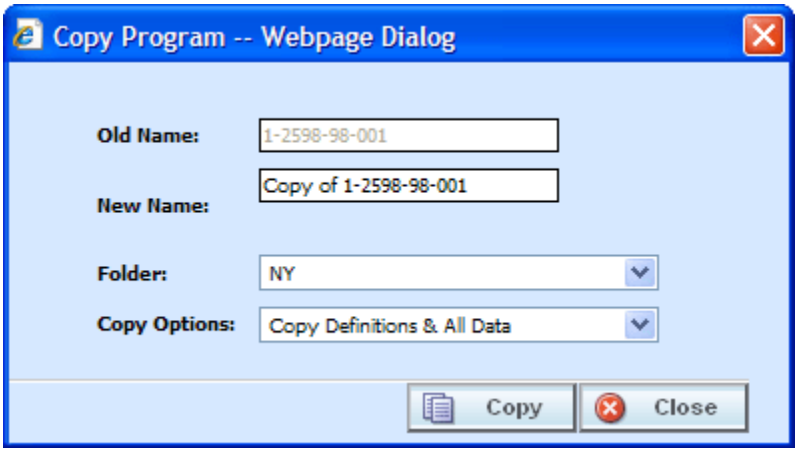


Figure 46 Copy Program Version

5. Selecting **Copy** copies the program version to the folder you selected. Selecting Close closes the popup without copying the program version.

NOTE: *When you copy a program, the version description is copied also. Be sure to make any changes to the version description to ensure the correct program information is displayed on generated reports.*

Notes on Program Versions

When copying a program version or creating a new version from an existing version, a note is created on the new program version that details from where the new program version was copied or created. Any notes added to the original program version are not copied into the new program version.

To view notes, select the program version and right click. Select Notes. The notes screen is shown with the information regarding the original program.

Deleting a Program Version

If a program version is no longer needed, it can be deleted. Unless you delete the last version of a program, deleting a version does not delete algorithms, variables, or driver assignment scenarios, but it does delete the sequence and any result groups. Deleting the last version of a program is the same as deleting a program.

To Delete a Program Version

1. In Programs, select the subline and folder where the program version you want to delete is located.
2. Double-click the program. All versions of the program are displayed in the Program Detail area. For newly created programs, there is only one version.
3. Select the version you want to delete. Right click and select **Delete**.
4. You must confirm the deletion of the version.

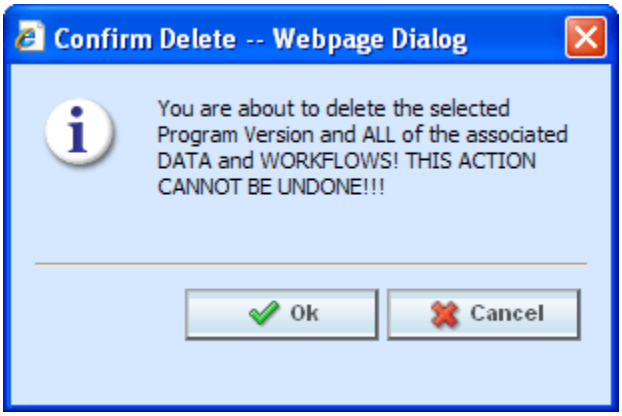


Figure 47 Delete Warning Message

5. Select **OK** to confirm the deletion or Cancel to stop the deletion.
6. You must confirm again that you want to delete the program version. If you are deleting the last version, you will be asked to confirm deletion of the program.

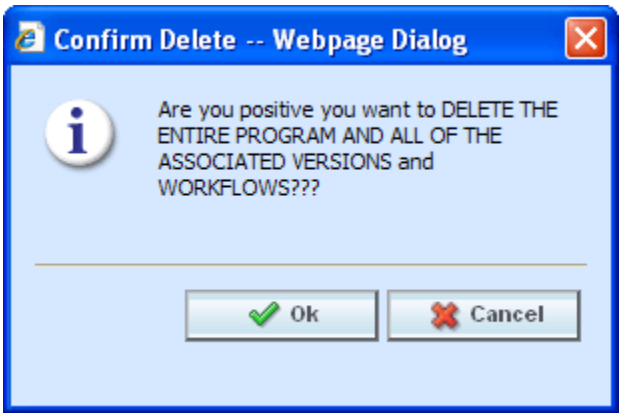


Figure 48 Confirming Delete

6. Select **OK** to delete. Click Cancel to stop the deletion.

NOTE: *Make sure this is the action you want to take. Program Version deletion cannot be undone.*

Editing a Program Version

Program version information can be edited at any time. Use the Edit Versioning Data option when you want to change the description of a version or enter data used for version selection.

To Edit a Program Version

1. Select the program version you want to edit and right click. Select **Edit Versioning Data**.

2. This opens the **Edit Program Version** screen where you can enter a program version name and update the versioning data information.

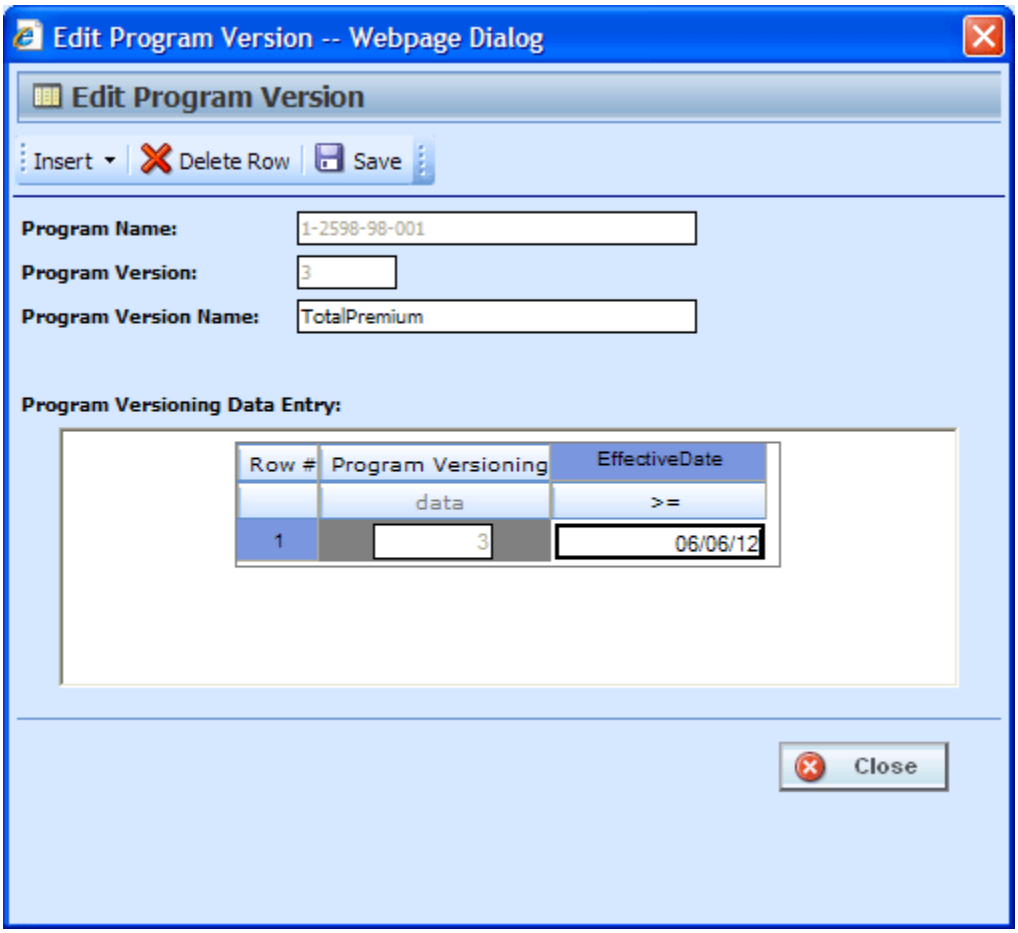


Figure 49 Editing a Program Version

3. When you have finished, click **Save** to save your changes. Click **Close** to close the Edit Program Version screen and return to Program Explorer. If you do not save prior to closing, your updates will not be saved.

PROGRAM VERSIONING DATA

Versioning data is used when you want to define which version of a program you want to use based on a policy level input selected at the program level. For example, if you have a program with three versions, and you want to select which version to use by the effective date (a policy level input); use version one if the effective date is this month, use version two if the effective date is next month and version three for any other date. You would enter the program and choose the effective date from the policy inputs. Then you would enter version one and set the versioning data for this month. You could do this with a less than or equal to the last day of the month. Next, enter version two and set the versioning data for next month. First set the versioning data to greater than or equal to the first of next month. Then you would add a row and set the effective date to be less than or equal to the last day of next month. Finally, leave the third version blank. This would cover any other day.

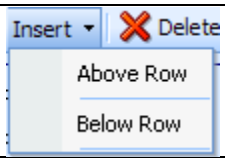
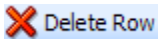
Setting up versioning data is a two step process:

Step 1: At the program level, select the input criteria you want to use. This is the input that determines which version of the program should be used. More than one input can be used.

Step 2: At the program version level, enter the defining parameters of the input.

FUNCTIONALITY

The **Menu Bar** is located at the top of the screen contains the functions you can perform.

	**Insert:** Inserts a new row into the table, either above or below the currently selected row. If no row is selected, the new row is added to the end of the table.
	**Delete Row:** Deletes the currently selected row.
	Save: Saves any changes made and then closes the screen. Changes made in the table are saved immediately.

FIELDS

The Edit Program Version screen contains the program information in the top portion of the screen and the versioning data table in the lower portion of the screen.

Program Information

Program Name: The name of the program. This can be edited only from the Edit Program screen.

Program Version: Version number of the current version. RateManager automatically assigns this when a new version is created and cannot be edited.

Program Version Name: Provides a place for you to enter a custom name for a version.

Program version names can help you to quickly identify a specific version. Program version names can be 40 alphanumeric characters including spaces. Program version names are not required and may be edited or removed at any time. Program version names are carried through to packages and are visible in IBFA and on other areas of RateManager such as MultiLines and Releases.

Versioning Data Table

The data table contains the policy level inputs selected at the program level. The data version parameters entered here determine if this version is to be used. When a version is being selected, the version that returns a true value based on the versioning data is the version to be used. If more than one version meets the criteria, the version with the most recent package date will be used. If no version meets the criteria, the version with the most recent package date is used.

The Program Versioning column in the data table always displays the number of the current version that is being edited. The data table can be left blank. In this case, the version with the most recent package date is the version used.

Setting Versioning Data

1. In the data table, enter the valid values that can be used to call the version of the program that you are editing.
2. Click **Close** if you are finished editing the table. Changes made to the data table are saved immediately.

Deleting Versioning Data

1. To remove a row in the data table, click on the row and select **Delete Row** from the menu bar. The row will be removed.
2. Click **Close** if you are finished editing the table. Changes made to the data table are saved immediately.

MANAGING PROGRAM VERSIONS

RateManager has several features to assist with collaboration and organization of program versions.

- **Program Version Names:** Program Version Names allow you to assign meaningful names, for example effective date or program author, to program versions.
- **Program Version Folders:** Program Version Folders allow you to assign program versions to a specific folder, for example major rate changes identifiers, or SoftRater staging environments.

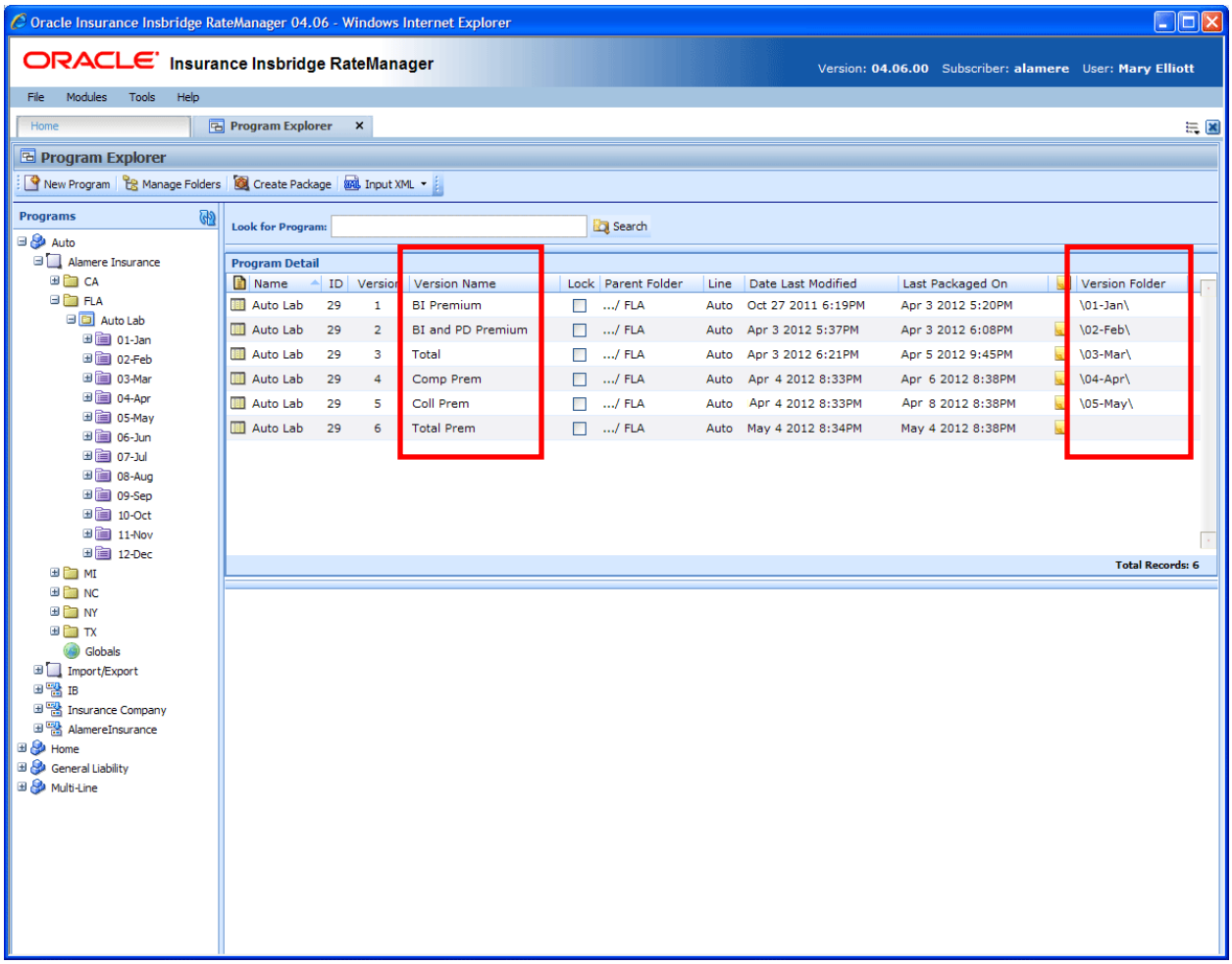


Figure 50 Program Explorer with Version Names and Version Folders

Program Version Names and Program Version Folders are displayed on the Program Explorer tab. Program Version Folders also are listed in the Programs area and in the Manage Folders screen.

Program Version Names

Program Version Names can assist with locating a specific version quickly by looking for a name instead of a program version number. Program version names can be 40 alphanumeric characters.

Program Version Names can be added to program versions at any time and do not affect the integration or the execution of SoftRater.

Program Version Names are optional. An automatically-generated version number is still created and can be used for program identification.

Creating a Program Version Name

Program Version Names are entered using the Edit Versioning option.

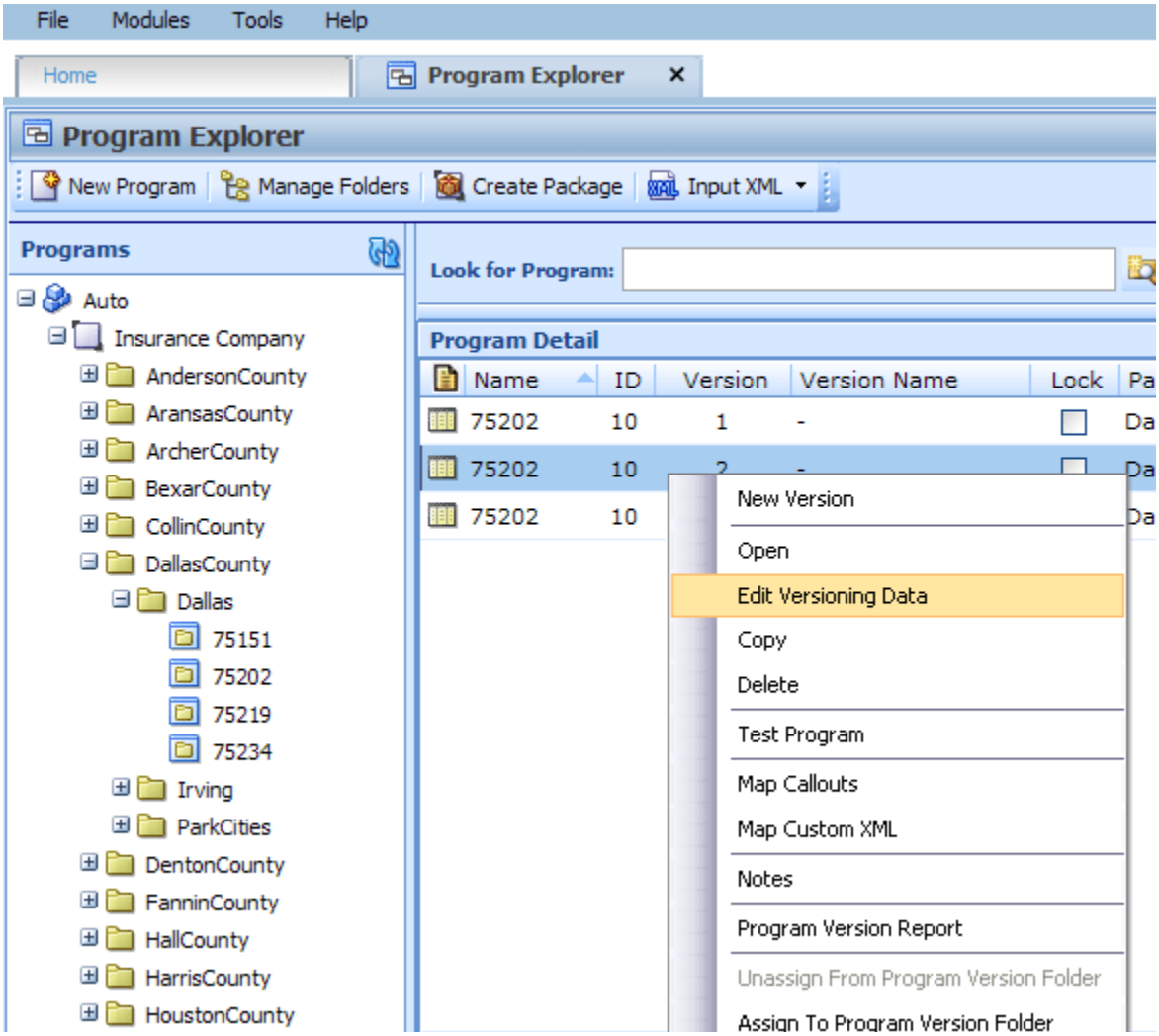


Figure 51 Creating a Program Version Name

1. To assign a name to a Program Version Name, **select the program version that you want to name**.

2. Right click and select **Edit Versioning Data**. The Edit Program Version screen is shown.

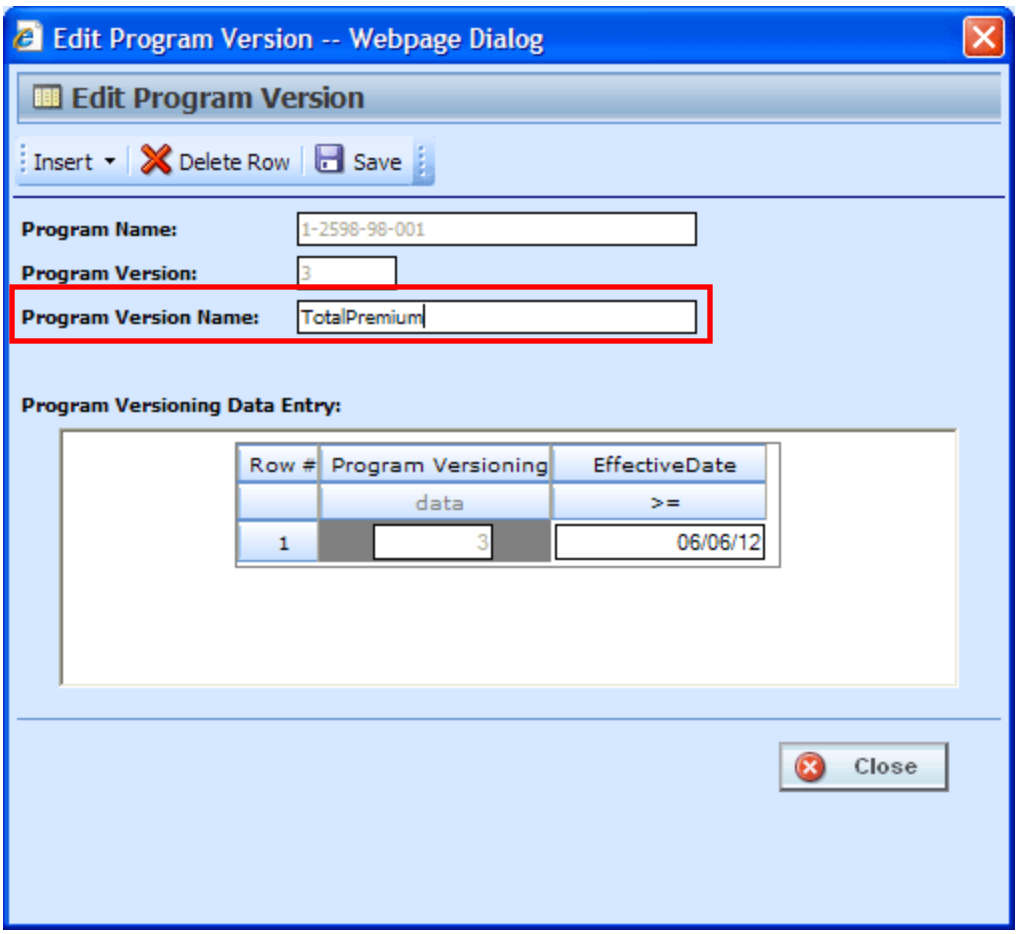


Figure 52 Entering a Program Version Name

3. **Enter a name** in the Program Version Name field.
4. Click **Save**.

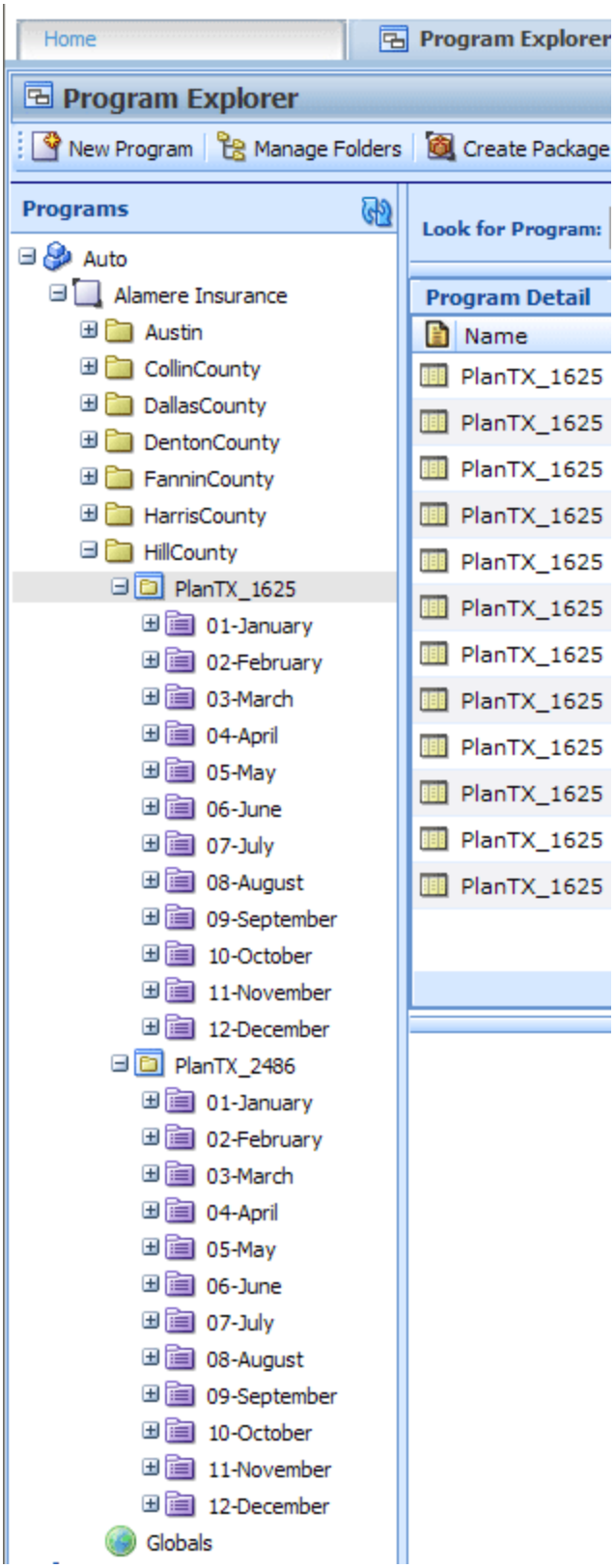
The Edit Program Version screen closes. The program name is displayed in the Version Name column in the Program Detail area.

Use this method to remove or edit a program version name.

Program Version Folders

Program Version Folders are optional holding folders that can help to organize multiple program versions into manageable groupings. This may assist when you have a large number of versions that you may not need any more but do not want to delete. Or when you are updating a program version and do not want other users to access it yet.

Program Version Folders are created in the Managed Folder screen. Assigning and unassigning program versions is performed on the Program Explorer tab. For more on creating program version folders, please see Creating a New Program Version Folder.



Program Version Folder Structure

Program version folders are nested under programs within the subline folder and are visible only when a program is in the subline folder. If no programs are in the subline folder, the program version folders are not visible.

The program version folder structure is duplicated in each program under the subline folder. While the folder structure is duplicated, the contents are not. Placing a program version in one folder does not also place that program version in another program version folder.

Functionality

You can assign any program version to a program version folder located under that program. You cannot assign a program version to a program version folder under another program. Meaning all program versions found under program A can be assigned to program version folders under program A only. You cannot assign a program version found under program A to a program version folder under program B.

Program versions can be assigned to one folder only. Program versions cannot be moved but can be assigned and then unassigned multiple times.

If you want to move the program version to another folder, you can go in an assign the program version again. You do not have to unassign it. The last assignment is where the program version will be located.

Program versions can be assigned and unassigned to program version folders at any time, and do not affect the integration or the execution of SoftRater.

Program version folders act a classification method. Assigning or unassigning a program version to a folder does not remove or replace the program version from RateManager.

Deleting a program version folder does not remove the program version from RateManager. Program versions will be disassociated from any folder but not deleted.

Assigning a Program Version Folder

Program versions can be assigned to a Program Version Folder at any time and do not affect functionality of the program version. Program versions do not need to be packaged. Locked program versions can be assigned to a Program Version Folder.

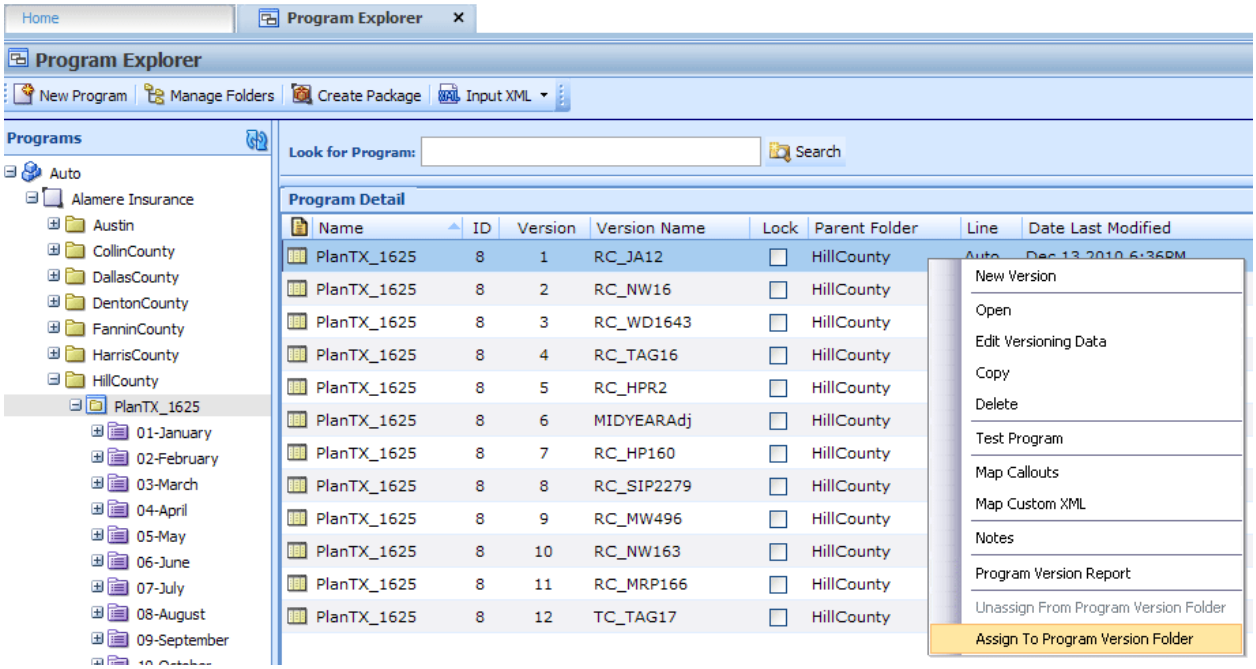


Figure 53 Assigning a Program Version Folder

1. To assign a program version to a program version folder, **right-click the program version you want to assign** in the Program Explorer tab.

2. Select **Assign to Program Version Folder**. The Assign Version to Program Version Folder is shown.

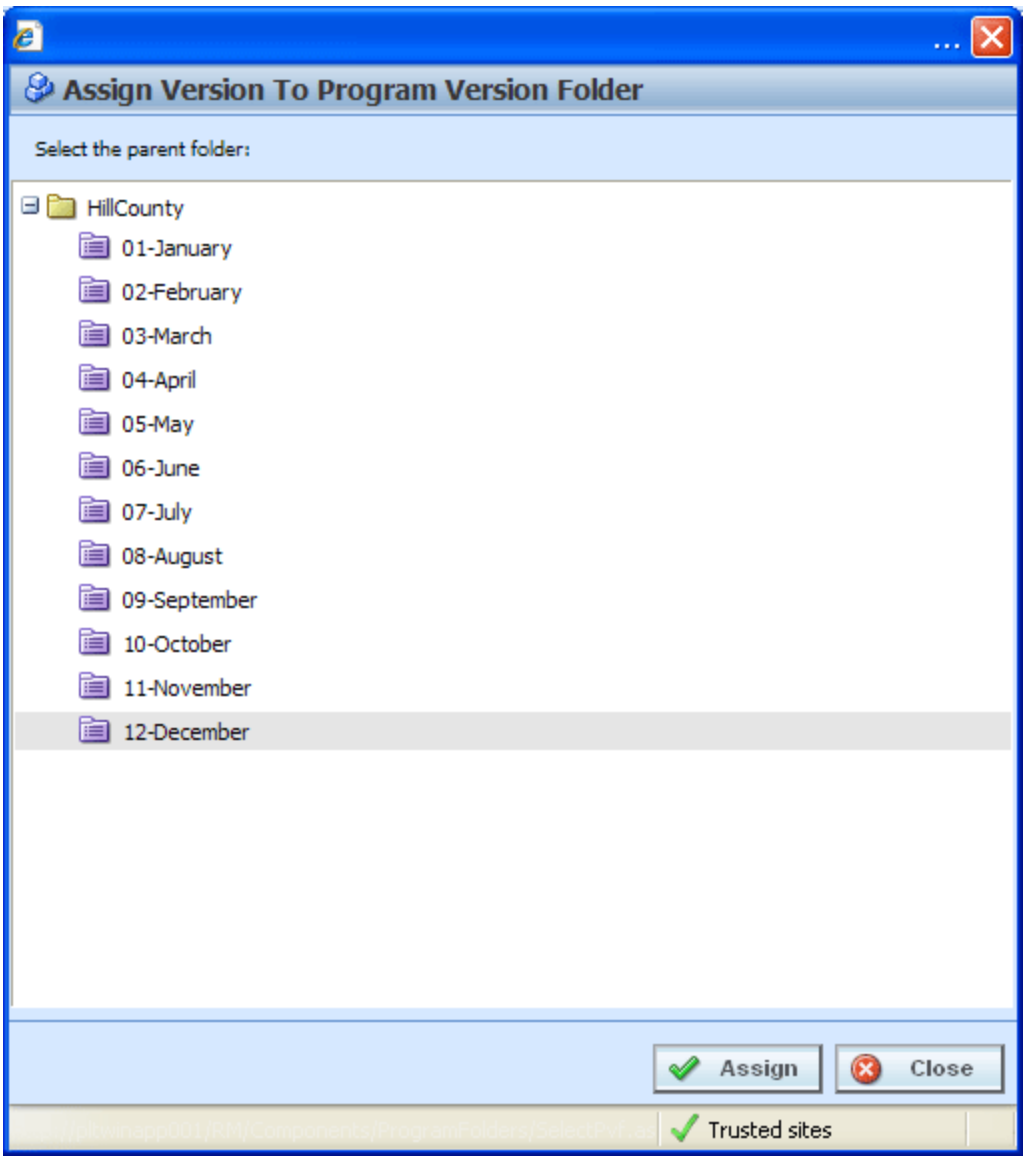


Figure 54 Assigning a Program to a Program Version Folder

3. **Select the desired program version folder** from the listing.
4. Click **Assign**.

The Assign to Program Version Folder screen closes and the selected program version folder is displayed in the Version Folder column in the Program Detail area.

Viewing Contents

To view the contents of a program version folder, click the folder. The versions contained are displayed in the Program Detail area.

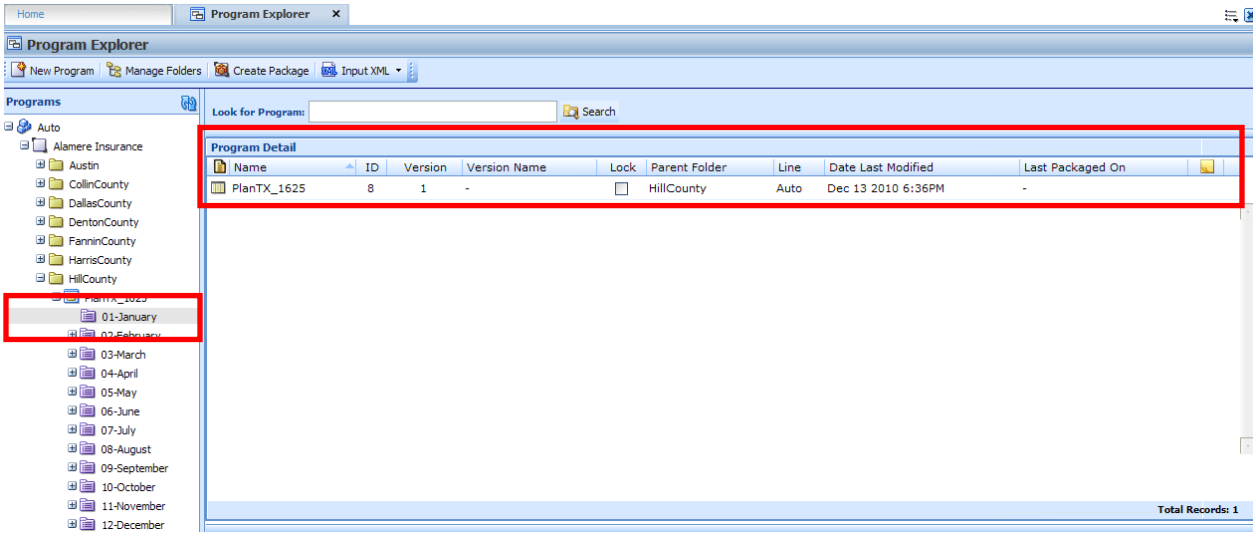


Figure 55 Viewing Program Version Folders Contents

Unassigning a Program Version Folder

Program versions can be unassigned at any time. Unassigning does not remove or delete the program version.

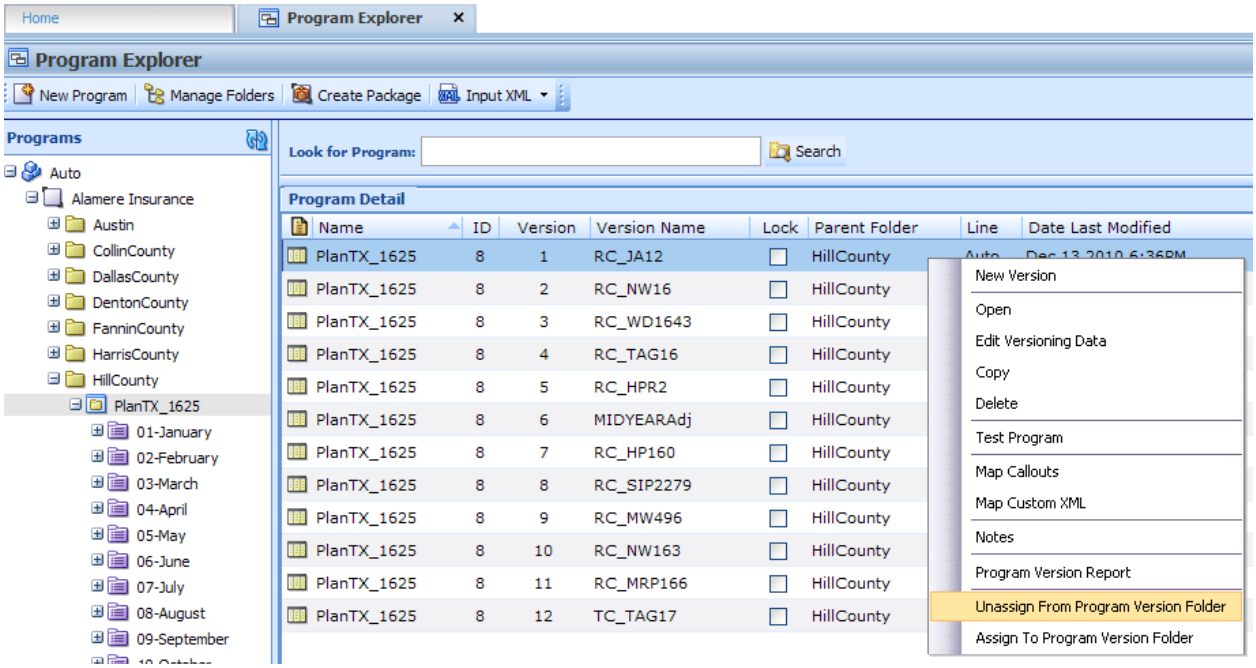


Figure 56 Unassigning a Program Version

1. To unassign a program version, **select the program version you want to unassign** on the Program Explorer tab.

2. Right-click and select **Unassign From Program Version Folder**.

3. A warning message is shown displayed. Select **OK** to unassign a program version. Click Cancel to keep the program version in the assigned folder.

SoftRater Automatic Version Selection

SoftRater can automatically determine what program version to use, based on the versioning criteria that were selected in RateManager. Your input XML should not specify a version, unless you want to override automatic versioning. Shown below is an example input file.

```
<rate rateId="99" policyId="10418124">
   <heading>
  <program parent_id="100" program_id="28">
    <m i="119" n="EffectiveDate" v="02012012"/>
  </program>
  <program parent_id="100" program_id="29">
    <m i="119" n="EffectiveDate" v="05012012"/>
  </program>
  <program parent_id="200" program_id="29" program_ver="3">
    <m i="119" n="EffectiveDate" v="03012012"/>
  </program>
    </heading>
    <c i="1" desc="Vehicle">
  <m i="386" n="VehicleId" v="1"/>
  <m i="182" n="Model Year" v="2010"/>
    </c>
    <c i="2" desc="Driver">
  <m i="367" n="DriverNum" v="1"/>
  <m i="37" n="Violations" v="0"/>
    </c>
    <c i="2" desc="Driver">
  <m i="367" n="DriverNum" v="2"/>
  <m i="37" n="Violations" v="0"/>
    </c>
</rate>
```

The above input XML calls 3 programs:

- The 1st program call is parent_id = 100, program_id = 28, with no specific version. When a version is not specified, automatic version selection is triggered. In this case, there is logic in Program 28 that tells SoftRater the correct version based on the EffectiveDate.
- The 2nd program is identical in nature to the 1st, but it calls program_id 29 instead.
- The 3rd program call is parent_id = 200, program_id = 29, and program_ver = 3. In this case, automatic versioning is overridden with a specific version call.

To enable SoftRater to automatically select a version of a program to rate, follow these steps:

1. Select which Policy inputs will be used to select a program version: see Editing a Program.
2. Specify the input values to be used by each program version: see Editing a Program Version.
3. Create a Global Versioning Package.
4. Rate an input file without specifying a program version.

Chapter 8

PROGRAM DETAILS

Program Details serves as a central location for viewing and managing program elements. Program element folders are displayed on the left hand side of the tab. A listing of the elements contained in the folders is displayed in the right hand side of the tab.

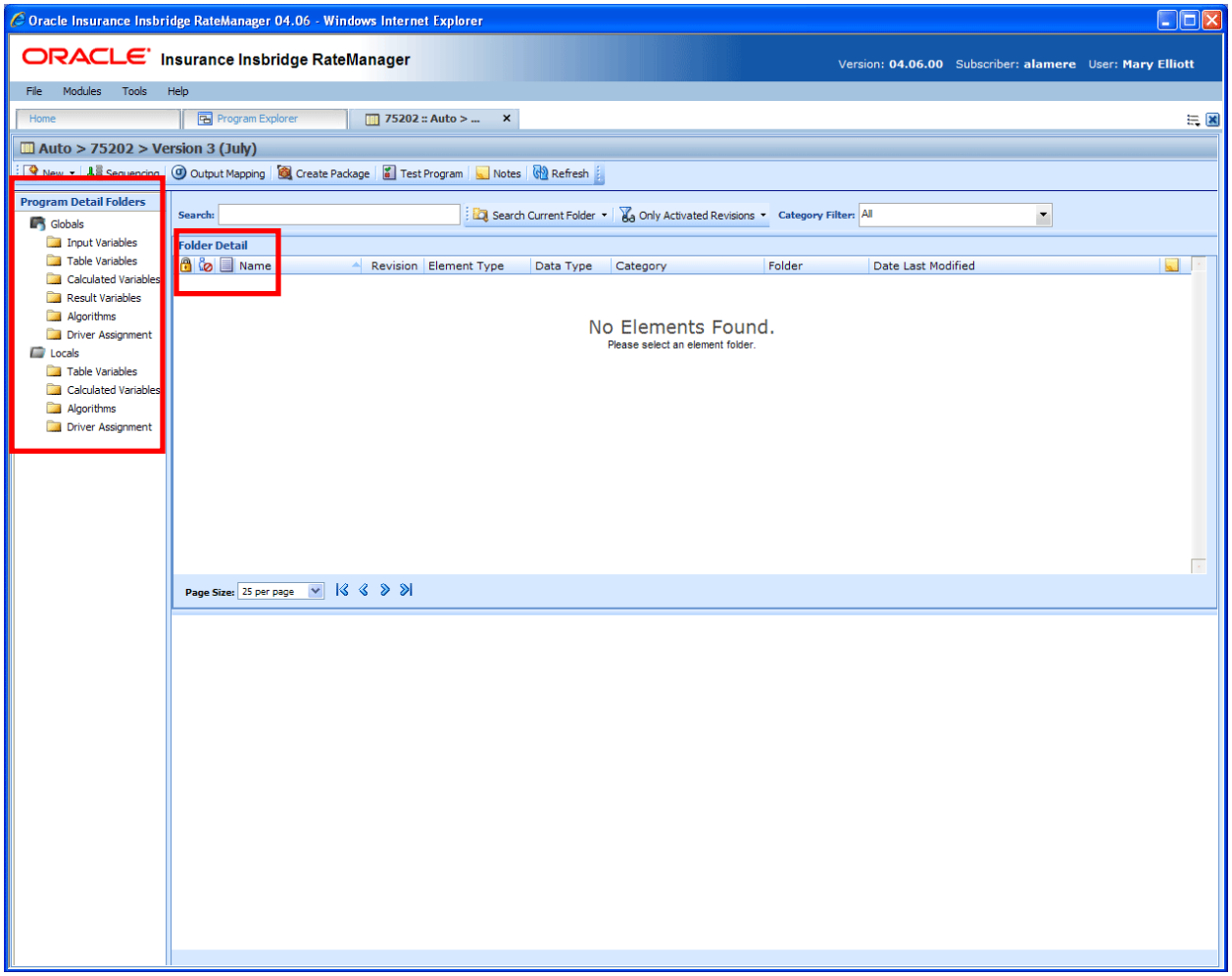


Figure 57 Program Details

Program Details is divided into two areas:

- **Program Detail Folders:** Program Details Folders is a navigation column on the left hand side of the tab. Global element folders belonging to the subline are displayed on top. Local element folders belonging to the program are underneath. These are fixed folders. They do not expand or have right click menus. You can double click the folder to view details.
- **Folder Detail:** Folder detail lists the individual elements contained in the folders you have selected from Program Details Folders. The item you select in the Program Detail Folders area determines what information is displayed in the Folder Detail area.

Navigating to Program Details

Program Details is where you manage and view the elements of a selected program version. Program Details is not an option on a menu. You must select the program version where you want to view the element details and then open it to access program details.

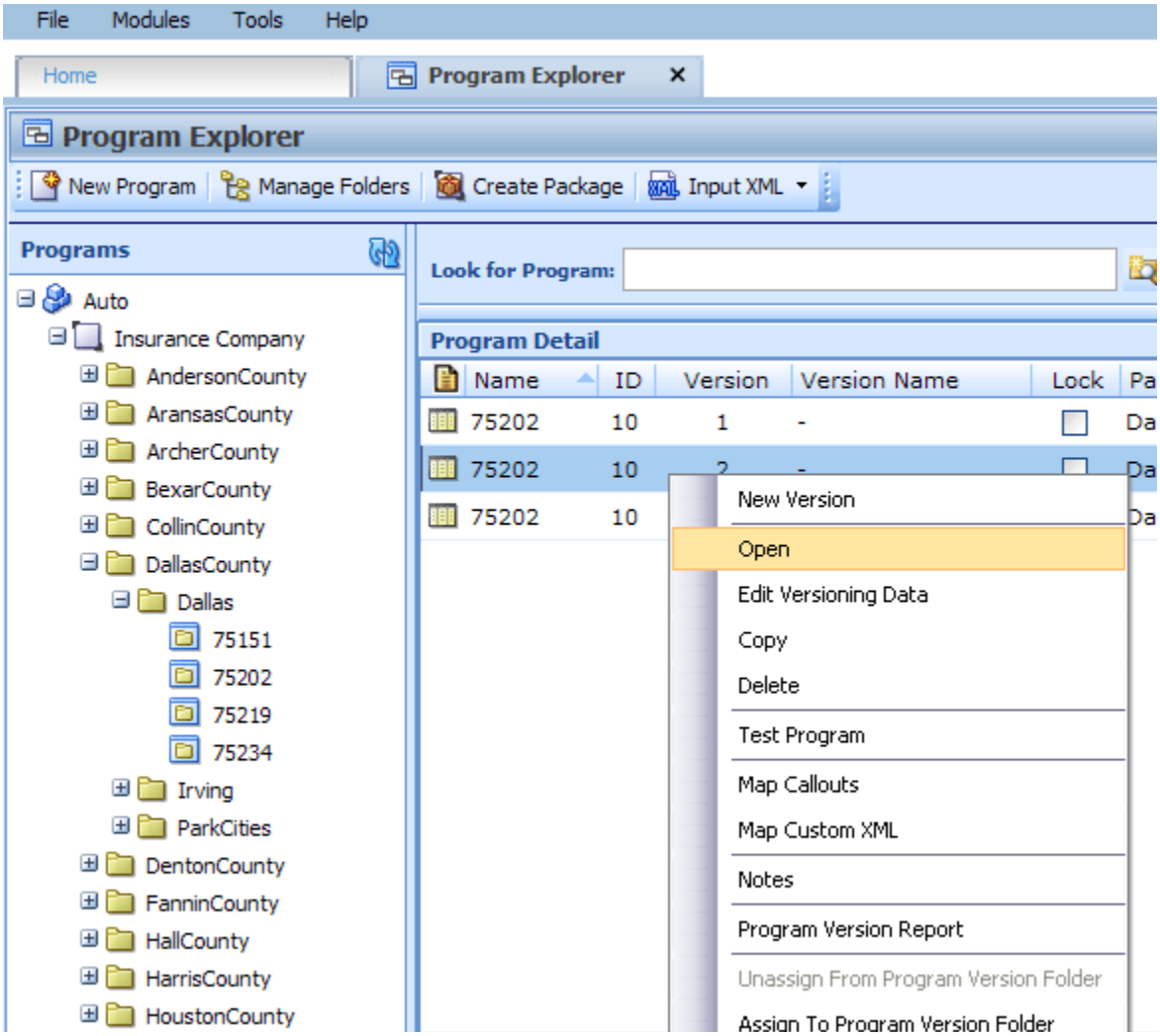


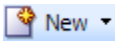
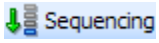
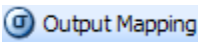
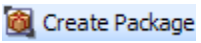
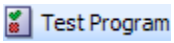
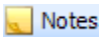
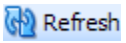
Figure 58 Navigating to Program Details

- You get to Program Details by right clicking on a program version in Program Explorer and selecting **Open**. Program Explorer is located in Modules→ Program Explorer.
- Program Details also opens when you select a recently opened program or a recently packaged program from a snap on your Home tab.

FUNCTIONALITY

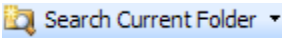
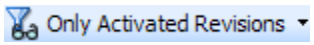
The **Menu Bar** is located at the top of the tab and contains the functions you can perform on this tab as well as a search option. The top bar menu has the options for creating packages, testing, and program version specific elements.

Functions:

	**New:** Begins the process of creating a new element. You must select: • **Globals:** Creates a new global element. • **Locals:** Creates a new local element. After you have selected Global or Local, you can select the element you want to create. Inputs, Result Variables, Calculated Variables, and Tables Variables, allows you to select **New** from the element and open the corresponding tab or popup without having to select local or global from the menu.
	**Sequencing:** Opens the Sequencing tab for this program version.
	**Output Mapping:** Opens the Output Mapping tab for this program version.
	**Create Package:** Opens the Create Package function for the selected program version.
	**Test Program**: Opens the Test Program tab. Test Program lets you create, execute, debug and maintain test scenarios within the RateManager application.
	**Notes:** Opens the Notes screen for the selected element. If you want to enter a note at the version level, you must do that from Program Explorer.
	**Refresh:** Refreshes the screen with the current information.

Search:

The **SEARCH** fields allow you to search for a particular element by name. Select the folder where you want to search in the Program Detail Folders area. Type or paste the element name you are looking for in the Search field. You can tab out of the field or hit enter to search immediately. You can further define your search by selecting options in the search area.

	Search: You can select enter the criteria you want to search by.
	**Search Current Folder:** You can select if you want to search only the currently selected folder or all folders.
	**Only Activated Revisions:** You can select to search only activated revisions, all revisions or all revisions that are used. This option is not available for Inputs or Result Variables.
	Category Filter: You can select to search a specific category or all categories.

PROGRAM DETAIL FOLDERS

Program Detail Folders is a navigation column on the left hand side of the tab. Global element folders belonging to the subline are displayed on top. Local element folders belonging to the program are underneath. These are fixed folders. They do not expand or have right click menus. You can double click the folder to view details.

FIELDS

	Global: The folders underneath are the global elements of the subline.
	Locals: The folders underneath are the local elements of the program.

Right Click Menu Options:

No right click Menus.

FOLDER DETAIL

The Folder Detail area lists the elements you have selected from Program Detail Folders and displays the details of any single element selected. The item you select in the Program Detail Folders area determines what information is displayed in the Folder Detail area.

There are two areas in the Folder Detail:

Element Listing: The upper portion is the element listing area. This area displays a list of the elements selected from the Program Detail Folders. For example, if you select Inputs in the Program Detail Folders area, a list of inputs is shown in the Folder Details area.

Element Details: The lower portion of the screen contains the details of the element selected in the Element Listing area. For example, if you select a table variable, the details of the table variable is hsown in the Element Details area.

FIELDS

The fields in the Element Listing area are the same for both global and local elements. Inputs and result variables can be managed at the global level only.

The Element Details area does not have any fields, only the details of the selected element.

NOTE: *Driver Assignment is available in the Auto LOB only. No other line has this option.*

Element Listing Fields:

SELECTION	DISPLAYS
Inputs	**Icon:** There are three icons: Locked. A lock in this field indicates that the input is locked. In-Use. Indicates that the input is being worked on by another user. Input. This icon indicates an Input. **Name:** The name of the input. **Data Type:** The type of input, i.e. date, decimal, integer or string. **Category:** The category the input is in. **Folder:** The folder the input is located in. **Date Last Modified:** The date and time the input was last updated. **Note:** A note icon indicates a note for this input. **XML ID:** The XML ID that is used to call the input.
Table Variables	**Icon:** There are four icons: Locked. A lock in this field indicates that the variable is locked. In-Use. Indicates that the variable is being worked on by another user. Advanced Option. Indicates that this variable contains an advanced option. Table Variable. This icon indicates a Table Variable. **Name:** The name of the variable. **Revision:** The revision that is used by the current program version. **Element Type:** For table variables, the number in parenthesis indicates the total number of variables, including this one that are linked together. **Data Type:** The type of variable, i.e. date, decimal, integer or string. **Category:** The working category of the variable. **Folder:** The folder the variable is located in. **Date Last Modified:** Time stamp of the last time the variable was saved. In the case of table variables, editing the data table will also update the time stamp. **Note:** A note icon indicates a note for this variable.

SELECTION	DISPLAYS
Calculated Variables	**Icon:** There are three icons: Locked. A lock in this field indicates that the variable is locked. In-Use. Indicates that the variable is being worked on by another user. Calculated Variable. This icon indicates a Calculated Variable. **Name:** The name of the variable. **Revision:** The revision that is used by the current program version. **Data Type:** The type of variable, i.e. date, decimal, integer or string. **Category:** The working category of the variable. **Folder:** The folder the variable is located in. **Date Last Modified:** Time stamp of the last time the variable was saved. **Note:** A note icon indicates a note for this variable.
Global Result Variables	**Icon:** There are three icons: Locked. A lock in this field indicates that the variable is locked. In-Use. Indicates that the variable is being worked on by another user. Result Variable. This icon indicates a Result Variable. **Name:** The name of the variable. **Data Type:** The type of variable, i.e. date, decimal, integer or string. **Category:** The working category of the variable. **Folder:** The folder the variable is located in. **Date Last Modified:** Time stamp of the last time the variable was saved. **Note:** A note icon indicates a note for this variable.
Algorithms	**Icon:** There are four icons: Locked. A lock in this field indicates that the algorithm is locked. In-Use. Indicates that the algorithm is being worked on by another user. Advanced Option. Indicates that this algorithm contains an advanced option. Algorithm. This icon indicates an Algorithm. **Name:** The name of the algorithm. **Revision:** The revision that is used by the current program version. **Element Type:** Displays the type of algorithm. I.e. Rating or Underwriting.

	Category: The working category of the algorithm. **Folder:** The folder the algorithm is located in. **Date Last Modified:** Time stamp of the last time the algorithm was saved. **Note:** A note icon indicates a note for this algorithm.
Driver Assignments Available in the AUTO LOB ONLY	**Icon:** There are three icons: Locked. A lock in this field indicates that the algorithm is locked. In-Use. Indicates that the algorithm is being worked on by another user. Driver Assignment. This icon indicates a Driver Assignment. **Name:** The name of the driver assignment. **Revision:** The revision that is used by the current program version. **Element Type:** Displays the type of driver assignment i.e. Scenario, Rank or Flag. **Category:** The working category of the driver assignment. **Folder:** The folder the driver assignment is located in. **Date Last Modified:** Time stamp of the last time the driver assignment was saved. **Note:** A note icon indicates a note for this driver assignment.
REVISIONS	**Will display a green checkmark for the active revision.**

Right Click Menu Options:

The right click menu options are available on the elements displayed in the Folder Details area. The menu depends upon the element selected, if the element is locked, and the rights you have. If you do not have rights or the element is locked, the menu option will be grayed out.

SELECTION	RIGHT CLICK MENU
Inputs	• **Edit:** Brings up the Edit Input Variable screen where you can make edits to the category location, data type and name. • **Copy:** Creates a copy of the input. • **Delete:** Deletes the inputs. You must have rights to delete inputs. • **View Where Used:** Displays the View Where Used report. Please see View Where Used for more information. • **View History:** Displays the Audit History of the Input. Please see View History for more information. • **Notes:** Enter, edit and view notes to the input.

SELECTION	RIGHT CLICK MENU
Table Variables	• **Edit:** Brings up the Edit Variable tab where you can edit variable information. • **Copy:** Brings up the Copy Variable screen for the variable. Not available on program locked variables. • **Delete:** Removes the variable from the program or subline. A warning message is displayed to confirm the deletion. Not available on any locked variables. • **Show/Hide Revisions:** Displays or hides the search results for revisions that contain the same name as this variable. This option is not available on program locked variables. • **Export Data (Tab-Delimited):** Exports a table that places all the data from a table variables data table into a tab-delimited text file. You can then make changes to the file and import the data into the same variable or a different variable. This option is for locked and unlocked table variables only. • **View Quick Report (All Data):** Shows all table data associated with the variable. This option is for both locked and unlocked table variables. • **View Quick Report:** The variables used and criteria are displayed. This option is for both locked and unlocked table variables. • **View PDF Report:** Generates a PDF of the data table for the currently selected table variable. This option is for locked and unlocked table variables only. • **View Where Used:** Displays an information screen that details where the variable is being used. Available to all locked and unlocked variables. • **View Dependency Report:** A dependency report gives you a tree view of all the associated variables and how they relate to one another. This option is for both locked and unlocked table and calculated variables. • **View History:** Displays a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. Not available on locked variables. • **Notes:** Enter, edit and view notes to the variable.
Table Variable Revisions	**Table Variable Revisions has two additional options:** • **New Revision:** Creates a new revision of the variable. • **Set as Active Revision:** Sets the currently selected revision as the active revision. After you accept the change, the selected revision will have a green checkmark to show this is now the active revision.
Calculated Variables	• **Edit:** Brings up the Edit Variable tab where you can edit variable information. • **Copy:** Brings up the Copy Variable screen for the variable. Not available on program locked variables. • **Delete:** Removes the variable from the program or subline. A warning message is displayed to confirm the deletion. Not available on any locked variables. • **Show/Hide Revisions:** Displays or hides the search results for revisions that contain the same name as this variable. Not available on program locked var. • **View Quick Report:** A report showing the breakdown of steps and the variables used. This option is for both locked and unlocked table and calculated variables.

	• **View Where Used:** Displays an information screen that details where the variable is being used. Available to all locked and unlocked variables. • **View Dependency Report:** Gives you a tree view of all the associated variables and how they relate to one another. This option is for both locked and unlocked table and calculated variables. • **View History:** Displays a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. Not available on locked variables. • **Notes:** Enter, edit and view notes to the variable.
Calculated Variable Revisions	**Calculated Variable Revisions has two additional options:** • **New Revision:** Creates a new revision of the variable. • **Set as Active Revision:** Sets the currently selected revision as the active revision. After you accept the change, the selected revision will have a green checkmark to show this is now the active revision.
Global Result Variables	• **Edit:** Brings up the Edit Result Variable screen where you can make edits to the category location, data type and name. • **Copy:** Creates a copy of the variable. • **Delete:** Deletes the variable. You must have rights to delete variables. • **View Where Used:** Displays the View Where Used report. Please see View Where Used for more information. • **View History:** Displays the Audit History of the variable. Please see View History for more information. • **Notes:** Enter, edit and view notes to the variable.
Algorithms	• **Edit:** Brings up the Edit Algorithm tab where you can make edits. • **Copy:** Creates a copy of the algorithm. Enter in a new name and the algorithm is copied and placed in the listing. Global algorithms, regardless of type, may be copied within the subline. The structure of the algorithm (including the working category and definitions) is copied. Not available on Program Locked algorithms. • **Delete:** Clicking Delete removes the algorithm from the list. A warning message is displayed to confirm the deletion. Not available on any locked algorithms. • **Show/Hide Revisions:** Displays or hides the search results for revisions that contain the same name as this variable. Not available on Program Locked algorithms. • **View Quick Report:** Clicking this option displays a report that gives a detailed view of the algorithm showing all of the steps and variables used. This screen contains the program name, revision, and working category. • **View Dependency Report:** A dependency report gives you a tree view of all the associated variables and how they relate to one another within the algorithm. • **View History:** Displays a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. • **Notes:** Enter, edit, and view notes to the algorithm.

SELECTION	RIGHT CLICK MENU
Algorithm Revisions	**Algorithm Revisions has two additional options:** • **New Revision:** Creates a new revision of the algorithm. • **Set as Active Revision:** Sets the currently selected revision as the active revision. After you accept the change, the selected revision will have a green checkmark to show this is now the active revision.
Driver Assignments Available in the AUTO LOB ONLY	• **Edit:** Brings up the Edit Driver Assignment tab where you can make edits. • **Copy:** Clicking Copy brings up the copy screen for the driver assignment. Enter in a new name and the driver assignment is copied and placed in the listing. Global driver assignments, regardless of type, may be copied within the subline. The structure of the driver assignment (including the vehicle usage options/category and steps) is copied. Not available on Program Locked driver assignments. • **Delete:** Clicking Delete removes the driver assignment from the list. A warning message is displayed to confirm the deletion. Not available on any locked driver assignments. • **Show/Hide Revisions:** Displays or hides the search results for revisions that contain the same name as this variable. Not available on Program Locked driver assignments. • **View Quick Report:** Clicking this option displays a report that gives a detailed view of the driver assignment showing all of the steps and variables used. This screen contains the program name, revision, and working category. • **View Dependency Report:** A dependency report gives you a tree view of all the associated variables and how they relate to one another for this driver assignment. • **View History:** Displays a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. • **Notes:** Enter, edit, and view notes to the algorithm.
Driver Assignment Revisions Available in the AUTO LOB ONLY	**Driver Assignment Revisions has two additional options:** • **New Revision:** Creates a new revision of the driver assignment. • **Set as Active Revision:** Sets the currently selected revision as the active revision. After you accept the change, the selected revision will have a green checkmark to show this is now the active revision.

Moving Your Cursor over an Element

When you hold your cursor over an element listed on the Program Details tab, an information box is displayed. The box identifies the element and any restrictions.

Scrolling Through Element Listing

If you have a long list of elements on the screen, select the scroll bar and drag it. An information box displays the element you are currently on. When you locate the element you need in the information box, release your cursor. If you are scrolling down, the element is displayed at the bottom of the screen. If you are scrolling up, the element is displayed at the top of the screen. The Folder Detail area may not show the element until you release your cursor.

This feature is helpful when you want to scroll through a long list of elements. Or see the last element on a long list.

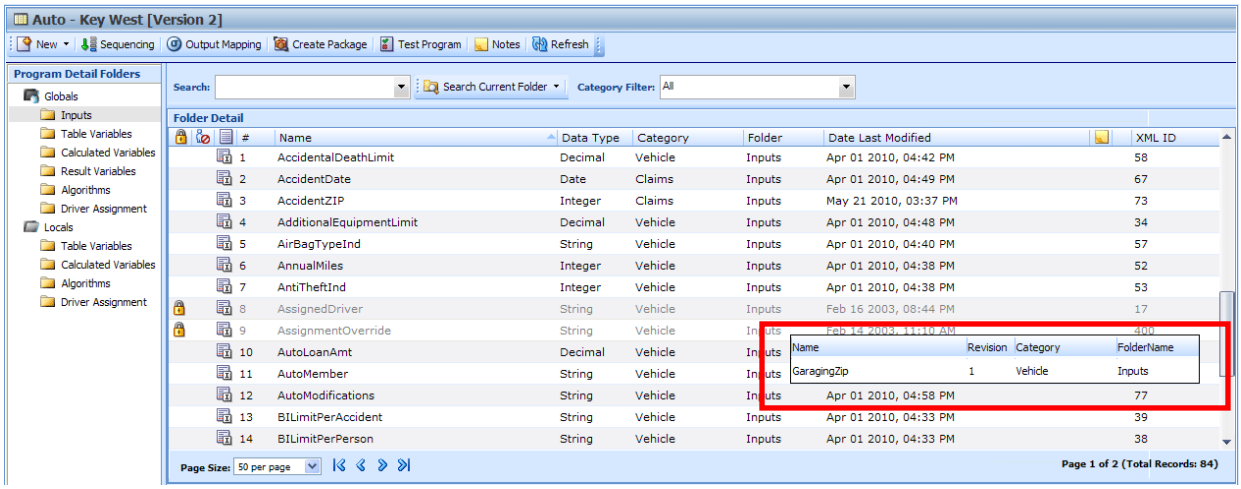


Figure 59 Element Information when Scrolling

Element Details

The element details area displays the details of the selected element. No actions can be performed in this area.

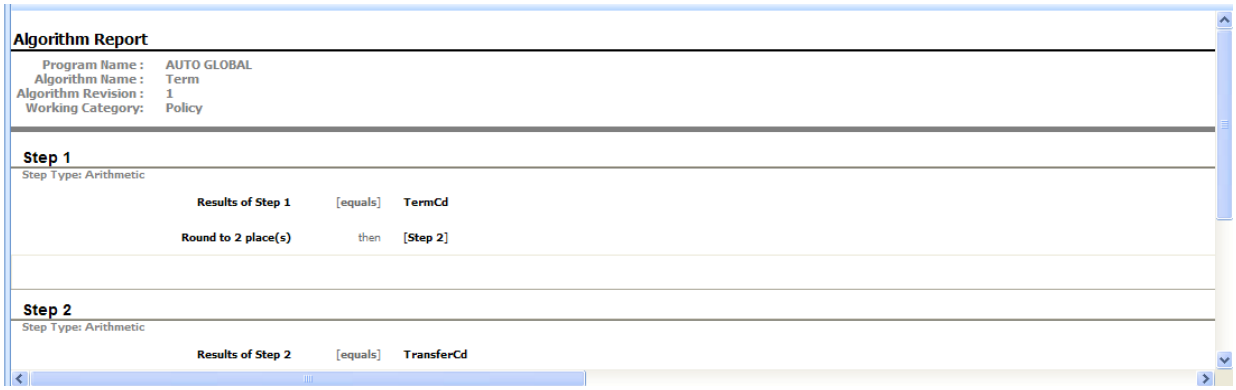
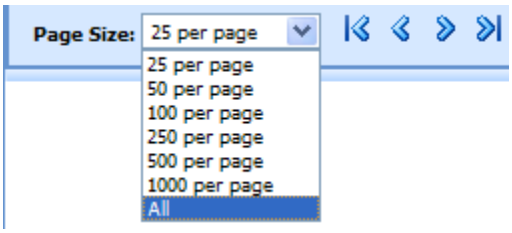


Figure 60 Element Details

Page Sizing

At the bottom of the element listing are the page size and page navigation options. *Page Size* allows you to select the number of elements you want displayed on the screen. The default setting is 25 per page. The ALL option displays all available elements on the screen. A total is listed to the right of the page size option. You can change the number of elements displayed at any time by selecting the page size option you want from the menu.

Page size is set per tab and applies to all elements on the Program Details tab. For example, if you select to view 50 per page on the Program Details tab then select an element folder, the page size remains 50.



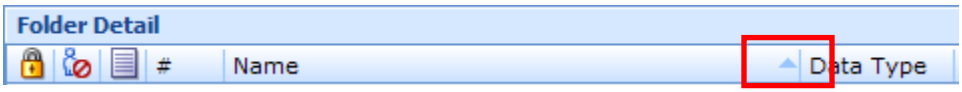
The *Page Navigation* options allow you to move back and forth between pages.

	Move to the first page
	Move back one page
	Move forward one page
	Move to the last page

Located on the far right is the total number of elements and the page you are currently on. You can place your cursor on the bottom of the element listing area and expand or contract the size of the area.

Sorting

You can sort fields by individual column headers. The default view is alphabetically (A to Z) by Name. To sort by a different column header, click the column header you want and the current results are resorted. You can sort results as many times as you want.



Sorting does not filter results. It only rearranges the order in which they are displayed. This applies to all screens in Program Details. You cannot assign a sorting preference per element.

The sort icon indicates the field that is determining the sort order.

- Elements are sorted A to Z or lowest to highest.
- Elements are Z to A or highest to lowest.

Chapter 9

GLOBALS

When an element is created under a specific program, it is referred to as a local element. When an element is created that can be used by all programs under the subline, it is referred to as a global element. If used properly, global elements can greatly reduce the time taken to load and maintain the same tables or logic in multiple programs.

Variables, algorithms, and driver assignments can be created at the global level and can be used in any program in the same subline. In addition, inputs and result variables also are created at the global level.

Globals are subline specific and should be used only if the item being created is identical across all programs in which it is used. For example, if your violation coding is standard and used in every program in the subline, a global table variable can be created and used as an established option for all of the programs in the subline. This is also optimal for maintenance.

When a global is changed, it automatically updates in every program.

Global Elements:

- Global Inputs
- Global Variables
  - Result
  - Table
  - Calculated
- Global Algorithms
- Global Driver Assignments

Global inputs, variables, algorithms, and driver assignments can be created by the user, imported or brought in from a template. Globals that are user created or imported are open for editing, copying, and deletion if they are not locked. Globals that were brought in from a template are locked at all times and cannot be unlocked. No editing or deleting is allowed. This is to ensure the integrity of the template. New globals can be added to a template generated subline and you can create new revisions. These new globals are open for editing, copying, or deletion, unless the program version is locked.

Global Rules

- At the global level, packages cannot be created and program testing cannot be done.
- Only global variables, inputs or results may be used in a global algorithm or driver assignment. You cannot use any local elements.
- Global elements are available for use by any of the programs under the subline where the element is defined.
- Global elements have the active revision set at the program level. The default active revision is revision 1. If there is another revision that you want to use, you will have to go into the program and set the revision there. You cannot change the active revision in the global tab.

GLOBALS TAB

The Globals tab is available from the Program Explorer. This tab lists only the global elements associated with the selected subline. Most of the features and functionality on this tab also can be found on Program Details with the exception of Categories. If you want to view or manage Categories, you must do so from the Globals tab.

Navigation

To access the Globals tab:

1. Select the line of business you need and then select the subline you need.
2. A Global icon is listed underneath the folders.
3. Double click the global icon and to open the Globals Tab.

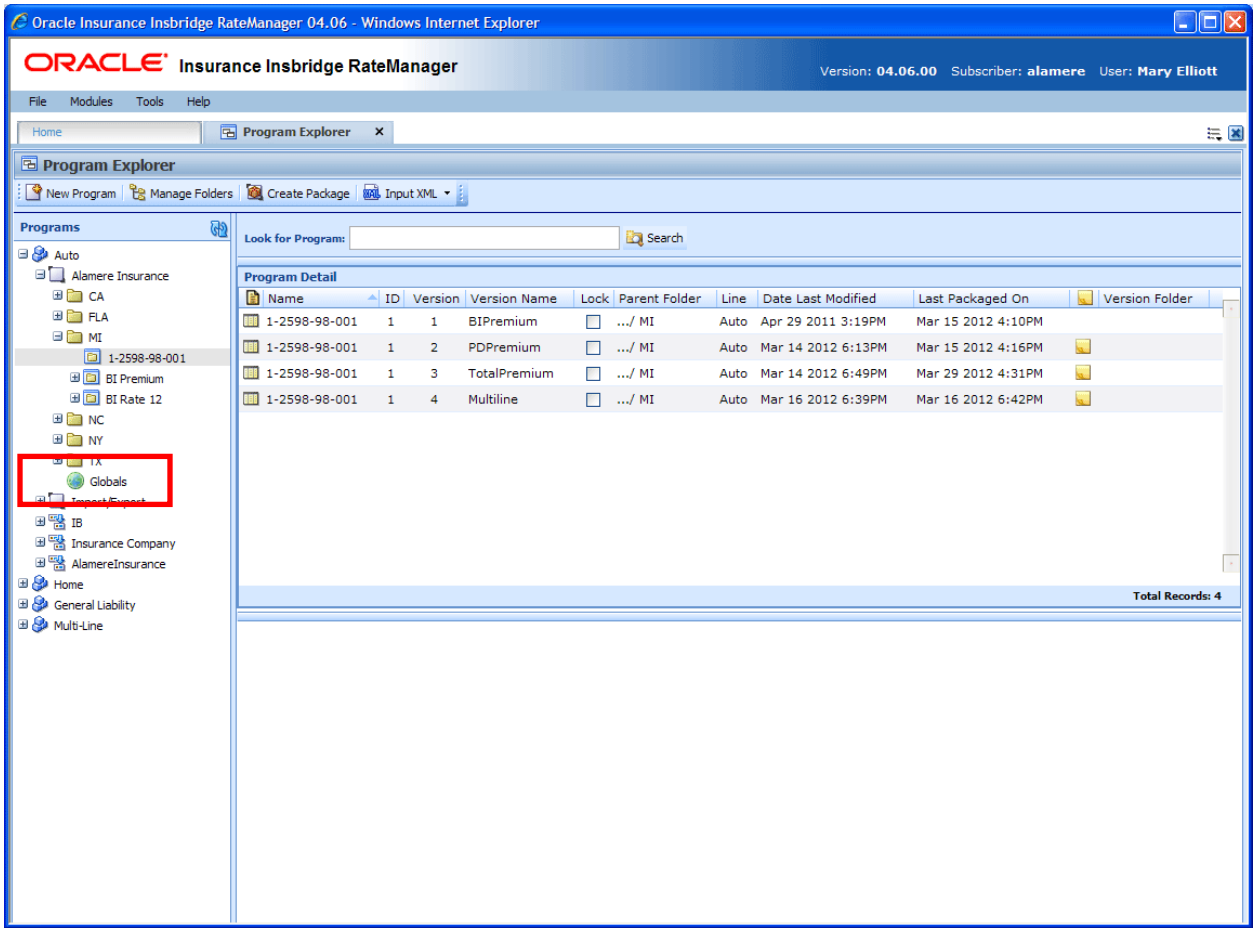


Figure 61 Selecting Globals for the Subline

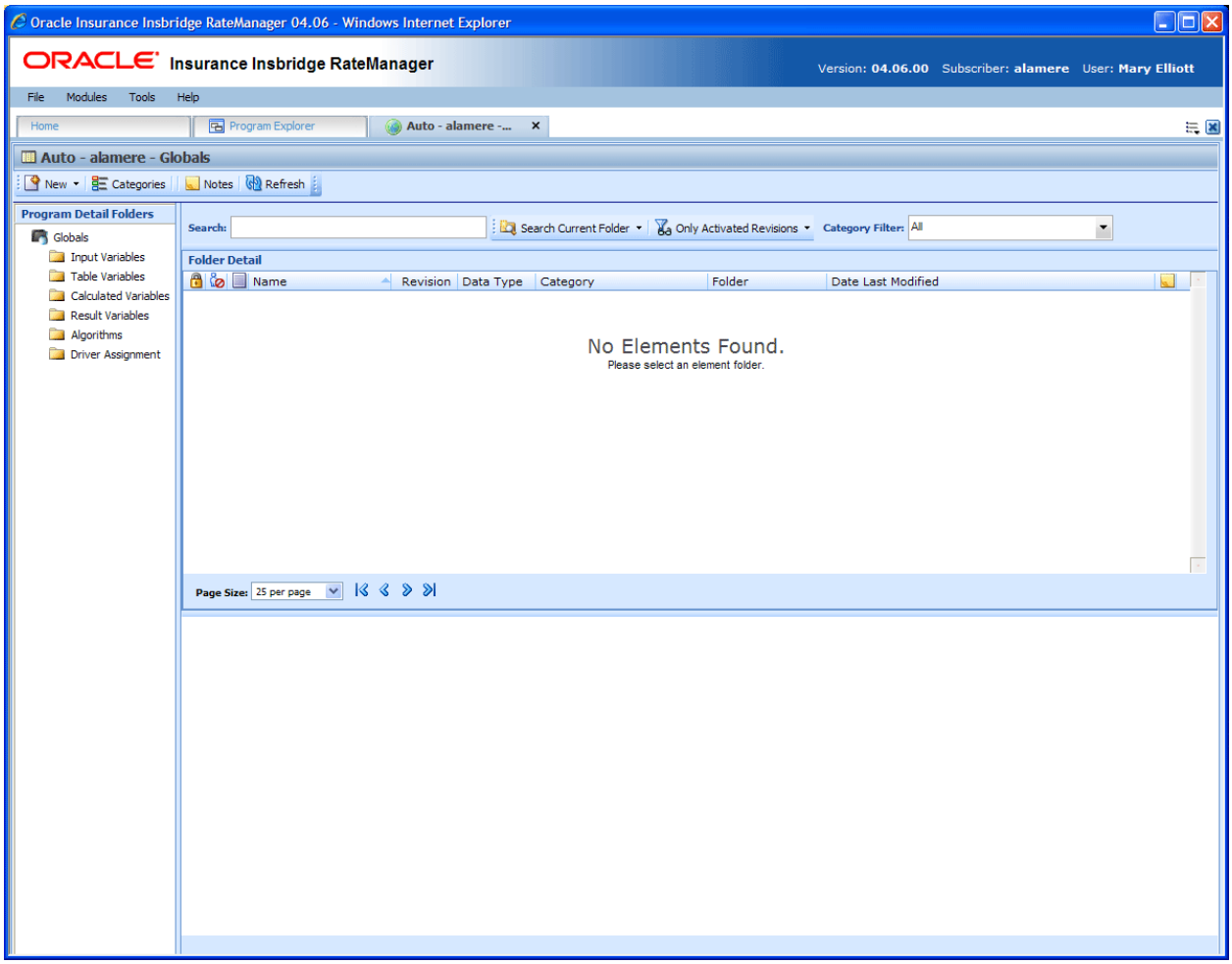


Figure 62 Global Tab

Functions:

The Global tab functions like the Program Details tab.

New	**New:** Begins the process of creating a new global element. Inputs, Result Variables, Calculated Variables, and Tables Variables, allow you to click New from the element and open the corresponding tab or popup. You must select the type of Algorithm or Drivers Assignment you want to create from the menu.
Categories	**Categories:** Opens the Category screen where you can view and manage categories.
Notes	**Notes:** Opens the Notes screen for the selected element.
Refresh	**Refresh:** Refreshes the screen with the current information.

Fields:

The fields on the Global tab perform like the fields on the Program Details tab with the exception of setting revisions. Revisions cannot be set at the global level.

Chapter 10

CATEGORIES

The category concept is central to program loading in RateManager. Categories define inputs, variables, algorithms and the overall structure of a program.

A category is a group of information that is specific to an item. For example, an auto policy would have categories of Policy, Driver, and Vehicle. A home policy would have a Policy and Dwelling category.

When categories are defined in RateManager, their relationship to existing categories is also defined. For example, in an auto program we may define Accidents and Convictions as belonging to Driver. In other words, Driver is the parent category of the Accidents and Convictions categories.

When variables and algorithms are created within RateManager, they are always assigned a category. The purpose of the category is to define the number of iterations the variable or algorithm should run. In the auto example, a Driver level category variable would run once for every driver on the policy. In the home example, a Dwelling level variable would run once for every dwelling on the policy.

When to Use a Category

Use a category to group a set of inputs together, so that the set will run for every instance of the group. For example, in calculating Driver Accident Points with an input of ViolationCode, you need to run a variable for every instance of ViolationCode for every driver. In this case, you could make a category of Violations whose parent category is Driver. In the Violations category, you would create an input of ViolationCode. When you create a variable like Accident Type, which is based on ViolationCode, the rating engine would look up an Accident Type for each ViolationCode passed into the system.

The following excerpt from an input file would represent a single driver with two accidents:

```
<ci="1" desc="Driver">
   <mi="23" d="BirthDate" v="09/13/1980"/>
   <mi="25" d="Gender" v="M"/>
   <ci="6" desc="Violations">
      <mi="102" d="ViolationCode" v="12"/>
   </c>
   <ci="6" desc="Violations">
     <mi="102" desc="ViolationCode" v="34"/>
   </c>
</c>
```

Navigating to Categories:

Categories are subline specific and are not an option on the Program Explorer tab or the Program Details tab. You must select the subline where you want to view or manage categories and then select the globals option for that subline. This opens the Globals tab where you can access the Categories screen.

1. Modules→Program Explorer. This opens the Program Explorer.

2. Select the Line of Business→Subline→**Globals**. This opens the Globals tab.

3. **Categories** are available from a button located on the menu bar.

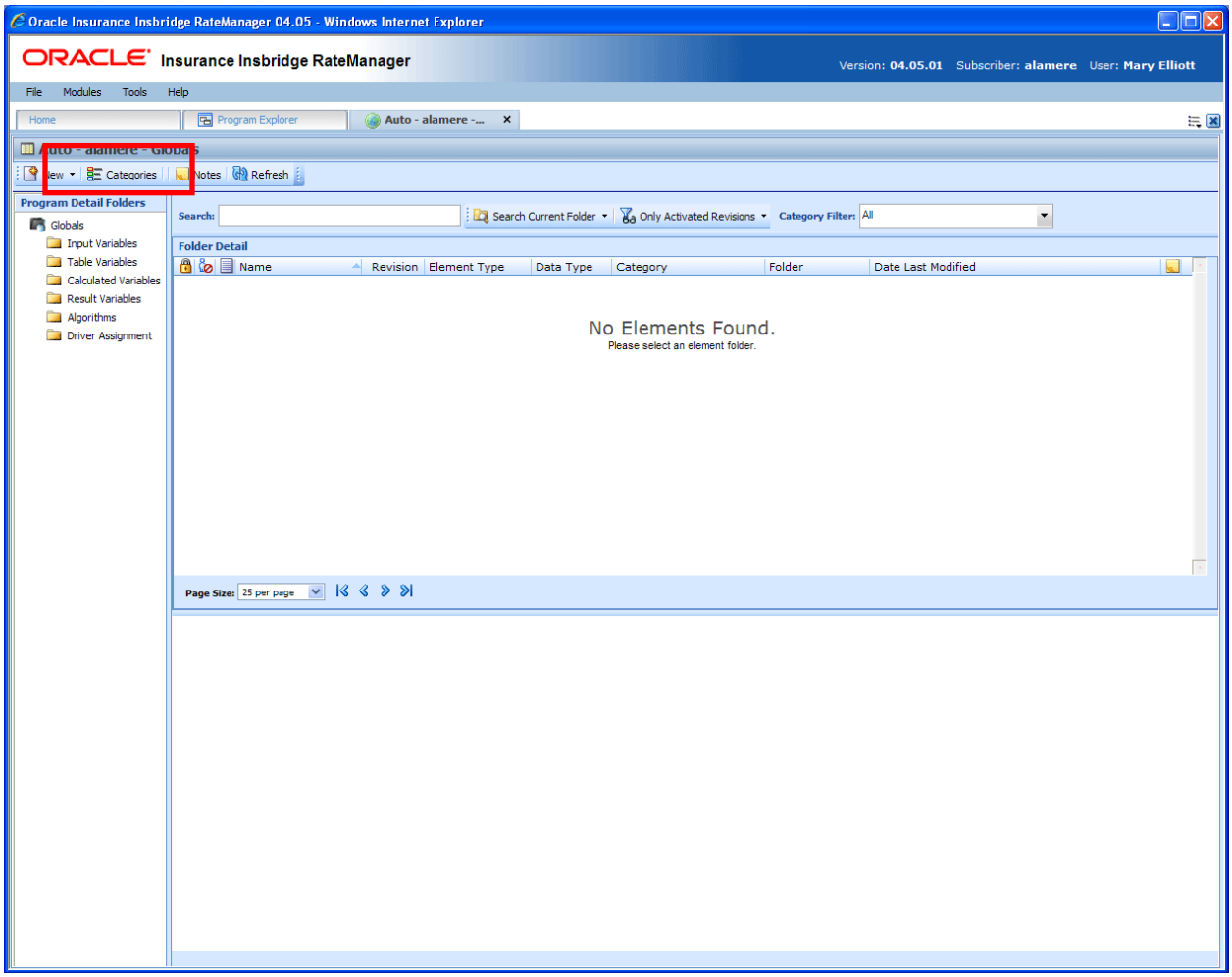


Figure 63 Categories Option on the Globals Tab

WORKING WITH CATEGORIES

The Categories screen lists all the categories for the subline. Every line has a system created Policy category (XML ID 0) that cannot be edited or deleted.

In the Auto LOB, the categories Driver, Vehicle, and Driver-Vehicle cannot be deleted or moved. The XML IDs for these categories cannot be changed and are always the same regardless of RateManager version, subline, or program version. The XML ID for the Driver category is 1, the Vehicle category is 2 and for the Driver-Vehicle the category is 3. The Driver and Vehicle categories will allow for the name to be edited. The Driver-Vehicle category cannot have any other category underneath it.

You can create as many categories as you need. Categories utilizes a parent/child relationship that allows for categories to be placed underneath each other or on the same level. This creates a multi level

set up where you can place an unlimited number of categories underneath the top level or any other category.

Top is the top-level parent category. All categories are created under Top. If you have not created any categories, you can add a new category under Top which would be placed on the same level as Policy or create a new category under Policy. If there are multiple categories already in the system, you can select the category pathway where you want to create a new category.

Categories that are locked cannot be edited or deleted. Locked categories have a lock icon.

NOTE: *In the auto line of business, your initial working category options are Policy, Driver, Vehicle and Driver-Vehicle. To create a variable that used both driver and vehicle inputs, you would need to define this variable in a Driver-Vehicle working category.*

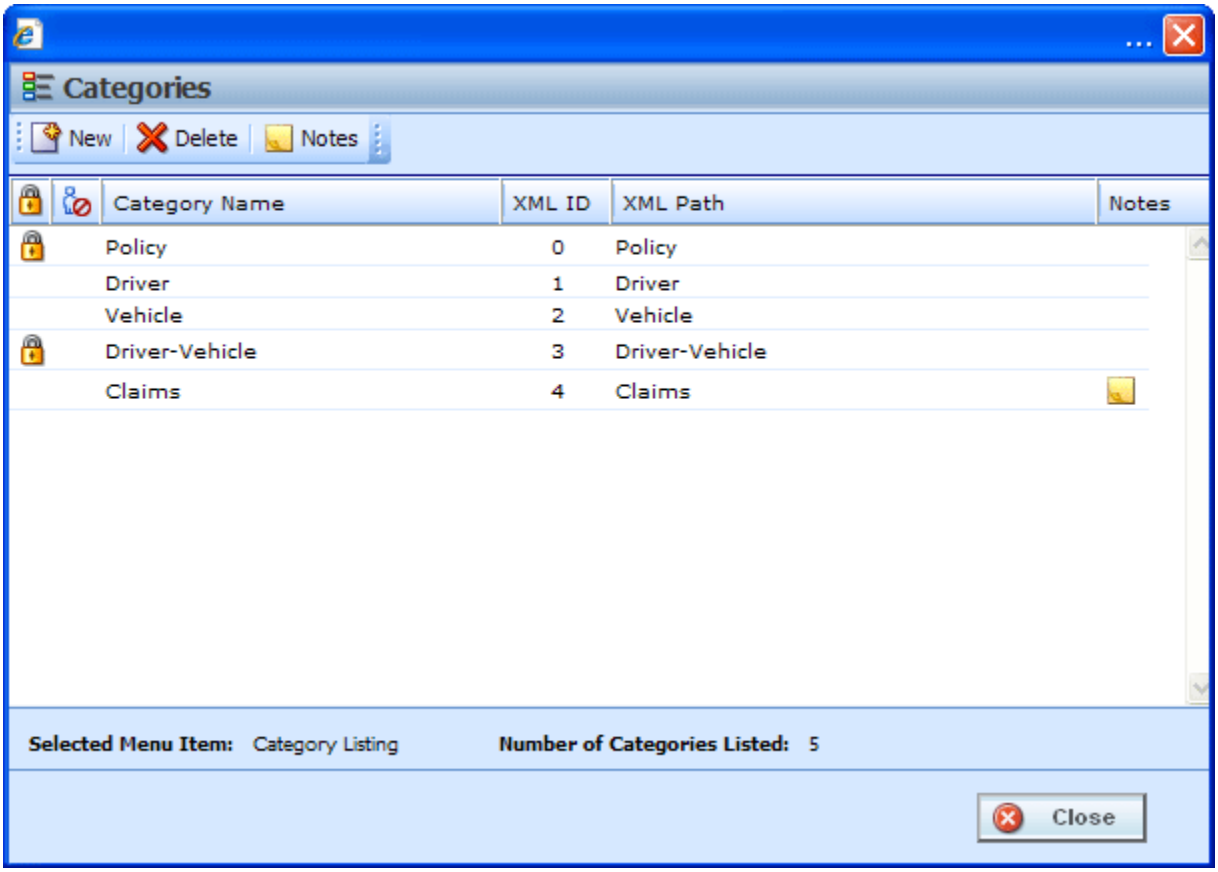


Figure 64 Categories Screen

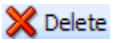
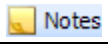
NOTE: *The Policy category (XML ID 0) always exists. It cannot be edited or deleted.*

The Categories screen shows the XML ID and parent category. From this screen you can:

- Create a New Category
- Edit a Category
- Delete a Category
- View History: See View History.
- Create, edit, and delete Notes: See Notes.

FUNCTIONALITY

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

	New: Creates a new category.
	**Delete:** Deletes the currently selected category.
	**Notes:** Opens the Notes screen for the category.

FIELDS

Categories can be sorted by the Category Name and XML ID fields. To change the order, click the field you want to sort by. The default view is numerically (lowest to highest) by XML ID. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want. Sorting does not filter results. It only rearranges the order in which they are displayed.

Category Listing:

Shows a listing of categories for the subline. To open a category, double-click it.

Icon: There are two icon fields:

Locked. A lock in this field indicates that the category is locked.

In-Use. Indicates that the category is being worked on by another user.

Category Name: Lists the name of the category.

XML ID: This number is automatically assigned by RateManager at the time of creation and is used to distinguish between categories when rating. XML ID numbers cannot be changed.

XML Path: Shows the parent category of the category.

Notes: A note icon indicates a note for this category.

Right Click Options:

The right click menus will depend upon the category. Policy will have three options, driver and Vehicle will have four options, and Driver-Vehicle will have two options. All User created categories will have five options.

To view the right click menu, select the category and right click.

- **New:** Opens the New Category screen where you can create a new category. New categories cannot be created under Driver-Vehicle.

- **Edit:** Opens the Edit Category where you can edit the selected category. Policy and Driver-Vehicle cannot be edited.
- **Delete:** Deletes the currently selected category. Categories that are in use cannot be deleted. Policy, Driver, Vehicle, and Driver-Vehicle cannot be deleted.
- **View History:** Opens the Audit History of the category.
- **Notes:** Opens the Notes screen where you can view and manage notes for the selected category.

When a program is locked, the categories used in that program are locked also. Locked categories cannot be edited or deleted.

Creating a New Category

1. Navigate to the **Category** screen for the subline where you want to create a new category.
2. Click **New**. You also can highlight most existing categories and right click. Select **New** from the menu.
3. A **New Category** popup is shown.

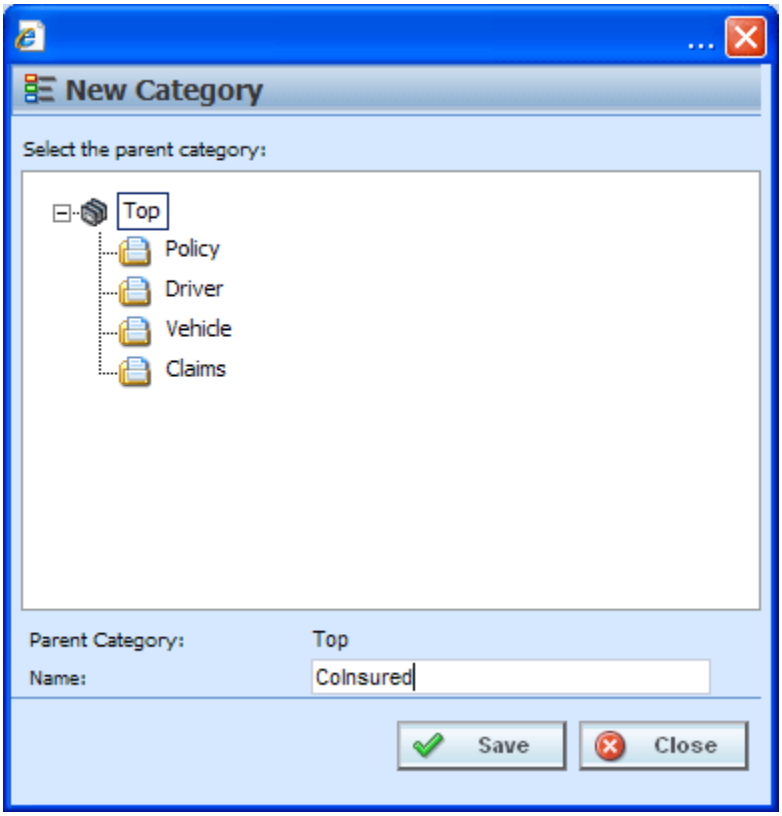


Figure 65 Creating New Category

4. Select the pathway for the new category. The Parent Category field shows the currently selected path. On the tree view, the final destination for the new category will have a box around it.

5. Enter in a **Name**. Click **SAVE** to save your category. The screen will refresh and the new category will be displayed in the Categories screen.

NOTE: *Oracle Insurance recommends that the Category Name not contain any spaces and that the Category Names be unique, regardless of the pathway.*

NOTE: *Once you have created a new category, it will be available from the working category drop down boxes in the variable and algorithm screens.*

Editing a Category

Editing a category allows you to change the category's name or change the parent category.

Changing a parent category allows you to change the category location within the same subline. When you move a category, all associated subcategories are moved as well. There is no limit to the number of times a category can be moved. The Policy, Driver, Vehicle and Driver-Vehicle categories will always be a top level category and cannot be moved underneath another category. Moving is performed on the Edit Category window.

Notes on Editing a Category

- You cannot change the XML ID of a category. RateManager automatically assigns the XML ID when the category is created.
- Categories that are grayed out cannot be moved. Name changes may be allowed.
- Categories that are locked are not editable.

WARNING: ***If you have already started creating your program, changing the parent category is not recommended.***

This is especially true for templates. Changing a category on an updated template may cause it to be rejected by the user who is trying to apply it.

To Edit a Category:

1. Navigate to the **CATEGORY SCREEN** for the subline that contains the category you want to edit.
2. Select the category you want to edit or move and either double-click it or right click it and select **EDIT** from the menu.
3. The **EDIT CATEGORY** popup will be displayed.

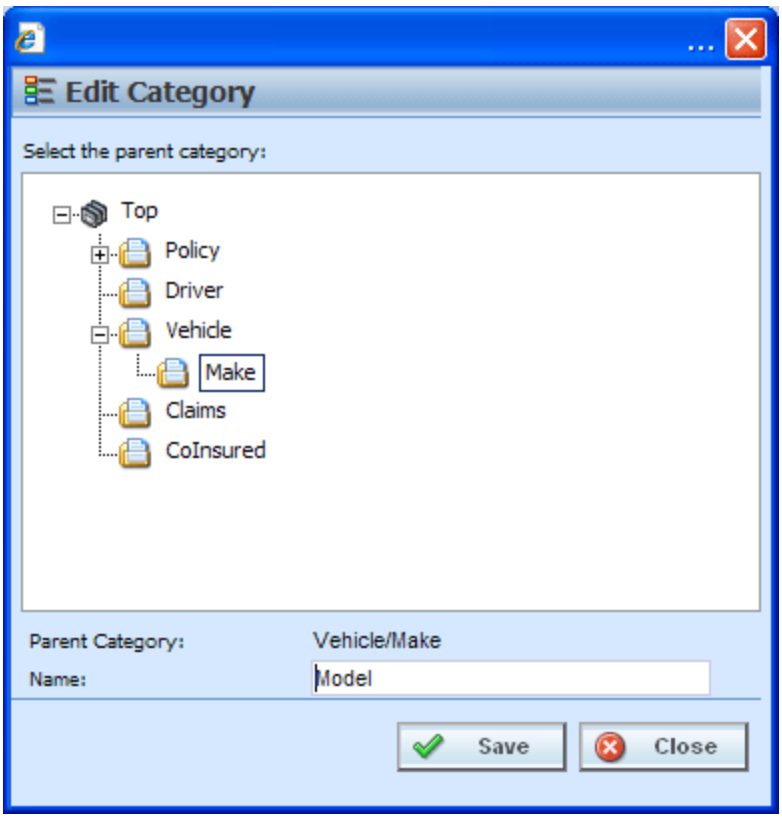


Figure 66 Editing a Category

4. To change file location, choose a new parent category. The folder you have selected to move will be displayed in the Name field but will not be displayed in the tree structure. Double click the folder where you want to move to. The Parent Category field will reflect the new path for the category.

5. Make any needed **Name** changes.

6. Click **SAVE** when you are finished to refresh the category listing.

Click **CLOSE** to go back to the Category screen without saving changes.

Deleting a Category

If you no longer require a category, you can delete it. When you delete a category, the reference to the XML ID also is deleted and will be available to be assigned to a new category.

In the Auto LOB, the categories Driver, Vehicle and Driver-Vehicle cannot be deleted.

Notes on Deleting a Category

- Categories being used by an element cannot be deleted.
- Categories that are grayed out or have a lock icon cannot be deleted.

To Delete a Category:

1. Navigate to the **Category** screen for the subline that contains the category you want to delete.
2. Select the category you want to delete and either click **Delete** or right click and select **Delete** from the popup menu.

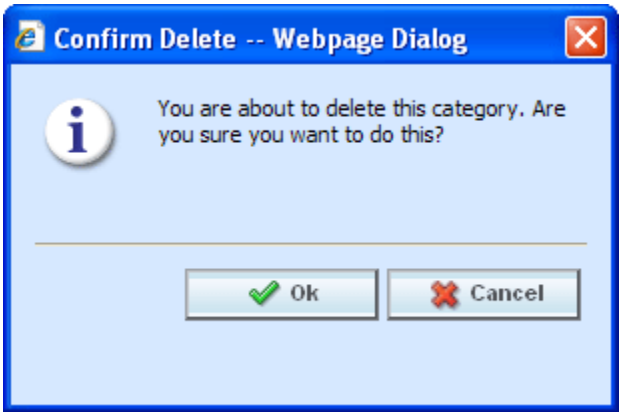


Figure 67 Deleting a Category

3. The category will be deleted and the category listing will be refreshed. If the category is still being used by an element, you will receive an error message.

INPUTS

Inputs are a way for you to pass information into the SoftRater engine. Inputs are subline specific and managed at the Global level. There are two areas to view and manage inputs, either from the Globals tab or from the Program Details tab. When selected, inputs will be listed in the Folder Details area. User created inputs can be edited, copied, or deleted. System and template generated inputs are grayed out and cannot be edited, copied or deleted.

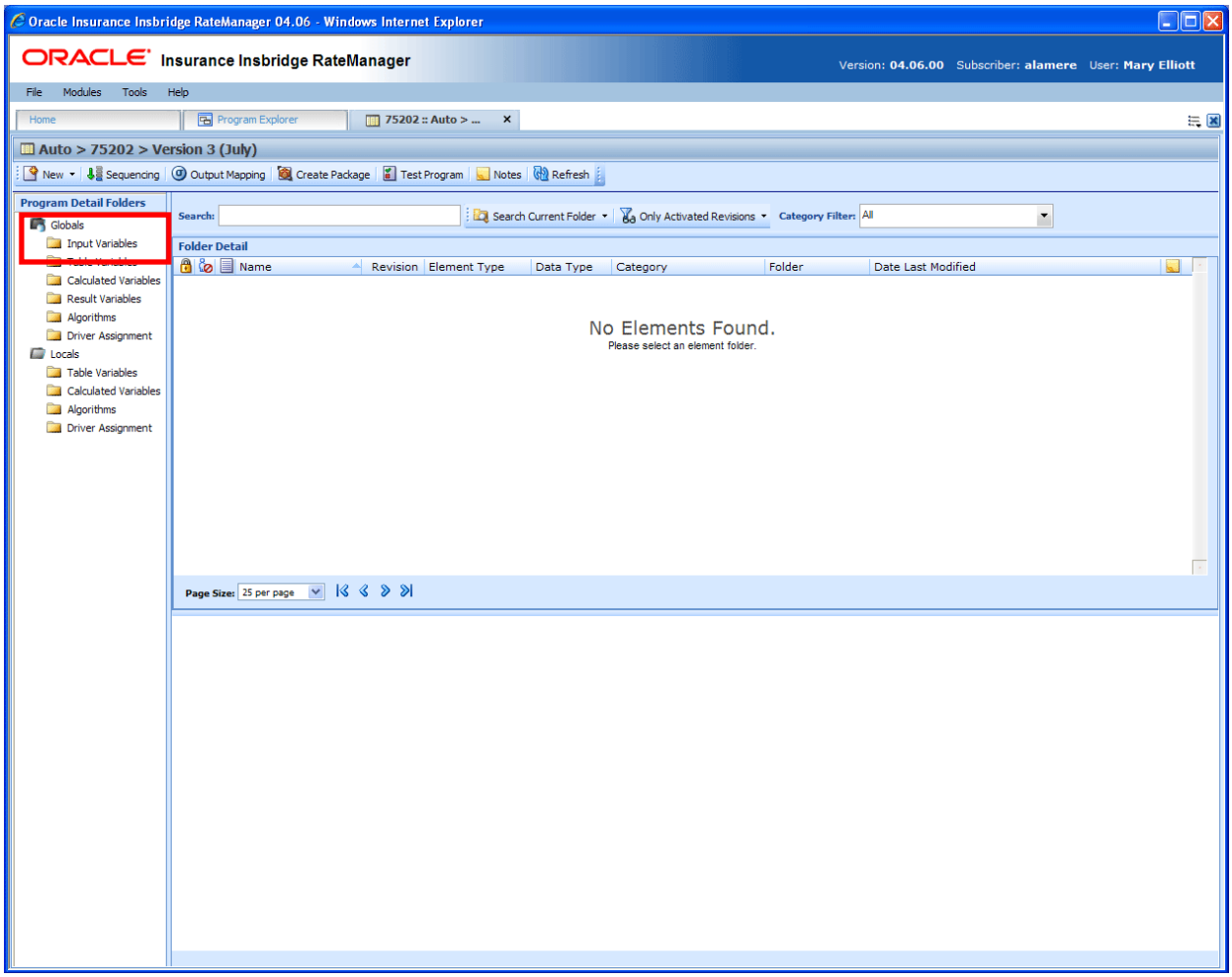


Figure 68 Selecting Inputs

The auto line of business has 24 system created inputs that are needed for driver assignment. For example, VehPrincipallyDriven (XML ID=299) is a system input. These inputs cannot be edited, copied, or deleted. It is recommended that you do not create another input using a system input name.

Navigating to Inputs:

Inputs are not an option on the Program Explorer tab.

1. Modules→Program Explorer. This opens the Program Explorer tab.

2. Select the Line of Business→Subline→Folder→Program → Program Version. You also can access Inputs from the globals tab. Line of Business→Subline→Globals.

3. **Open** the program version to get the Program Details tab. Inputs are available from the Program Detail Folders area on the left hand side of the tab.

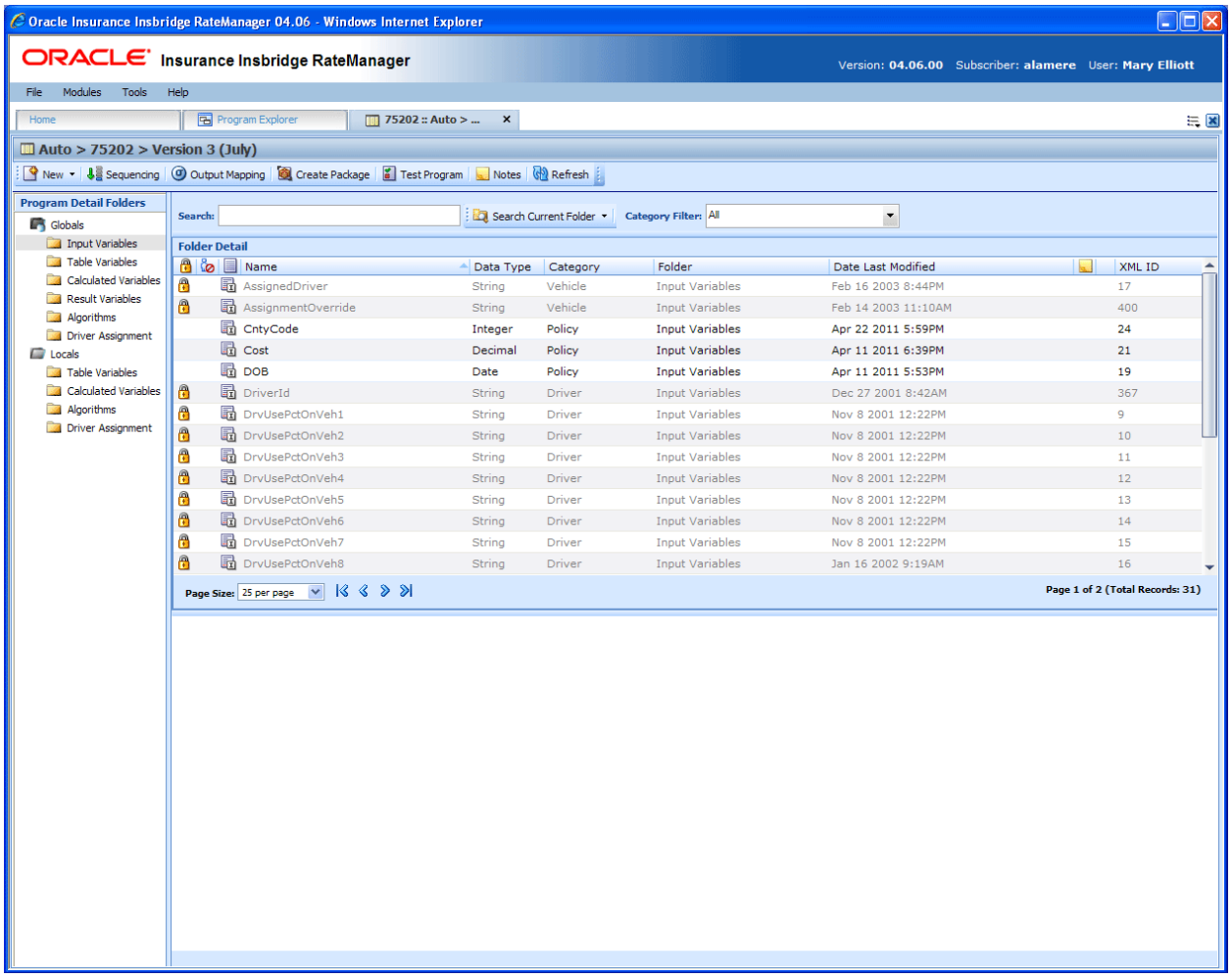


Figure 69 Input Listing

FUNCTIONALITY

Functions can be accessed from the menu bar located at the top of the screen and from the right click menu of any unlocked input. The basic functions are:

- **New:** New Inputs can be created at any time.
- **Edit:** Any unlocked, user created input can be edited at any time.
- **Copy:** Any unlocked, user created input can be copied at any time.
- **Delete:** Any unlocked, user created, unused input can be deleted at any time.

Functions:

The functions you can perform will depend on the status of the input. Locked inputs will have fewer options. There are icons that can tell you at a glance what the status of the input is.

Icon	What it Indicates
	Input. Inputs are subline specific and can be created at the global level, from a program version, or from another program element with limited category options. All inputs will be displayed on the Program Details→Input tab. The same input listing will also be available for Subline→Globals tab. The same options, new, edit, copy and delete are available on either tab.
	Locked Input. Locked inputs are not open for editing. A lock icon indicates that this input is locked by either a program or is system generated and is not open for copying, editing, or deleting. If the input is locked because the program is locked, you must return to the program and unlock it. This will unlock the input and changes can be made. If the input is locked because it is system generated, you will not be able to unlock the input. You can create a new input if necessary.
	Template Lock. If the input is locked because it came from a template, you cannot unlock the input. You can create a new input if necessary.
	In-Use. Inputs that are in use are currently being worked on by another user in the system are not open for editing, copying, or deleting. The input will be available when the user exits the input.

FIELDS

The fields are the same for the Global Tab and Program Details. For more on field descriptions, please see Program Details→Fields.

Right Click Menu Options

To view right click menu options, highlight the input you want to view and right click. Unlocked input variables will have six right click menu options:

- **Edit:** Clicking Edit brings up the edit screen for the input.
- **Copy:** Clicking Copy brings up the copy screen for the input. Enter in a new name and the input is copied and placed in the listing.
- **Delete:** Clicking Delete removes the input from the list. A warning message is displayed to confirm the deletion.
- **View Where Used:** Clicking View Where Used displays an information screen that details where the variable is being used. See View Where Used for more information.
- **View History:** Click to view the Audit History. See View History for more information.
- **Notes:** Allows you to enter, edit, and view notes for the input.

Template Locked input variables have three options, Copy Variable, View Where Used, and Notes. Program Locked input variables have two options, View Where Used and Notes.

Creating a New Input

In order to create a new input, you must have your categories set up. RateManager automatically has a Policy category for each subline. Inputs can be template generated or created by you. Template generated inputs will be grayed out and locked. They are not open for editing, copying or deletion. A new input can be added to a template generated subline if needed. Inputs should be unique at the category level. This means that you should use unique input names in every category. For example, if you need a BaseRate input for Policy and Driver, you can create a BaseRate input for the policy category and a BaseRateDR input for the Driver category.

To Create a New Input

1. On the Program Details tab, select Inputs from the Program Detail Folders. Click **New** in the top bar menu. This opens the **New Input Variable** popup.

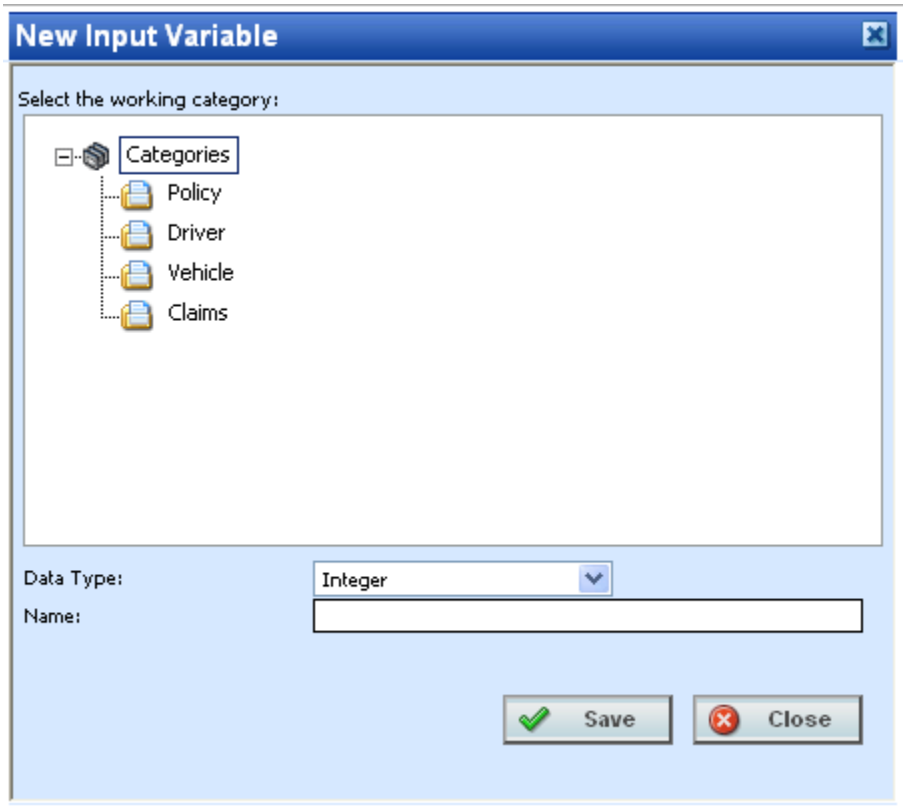


Figure 70 Global Input Variable Popup

2. Double click the category where you want the new input to be placed. If Policy is the only category, you may need to return to Categories to create the one you need. On the tree view, the final destination where the new input will be placed will have a box around it.

3. Select a **Data Type** from the menu.

4. Enter in a **Name**.

5. Click **SAVE** to save your input. The screen refreshes and the new input is displayed on the Program Details→Input tab. An XML ID is automatically assigned for the new input variable.

Adding a New Input from another Area

A new input can be created while entering or editing a table or calculated variable, algorithm, or driver assignment without leaving the Edit tab. The category you can add the input to is determined by the Working Category selection. The new input can be edited on the Program Details→Input tab, if needed.

If the new input needs to be in a new category, you must leave the Edit tab and create the category in the Program Details→Globals tab and then return to the Edit tab or the Input tab to create your input.

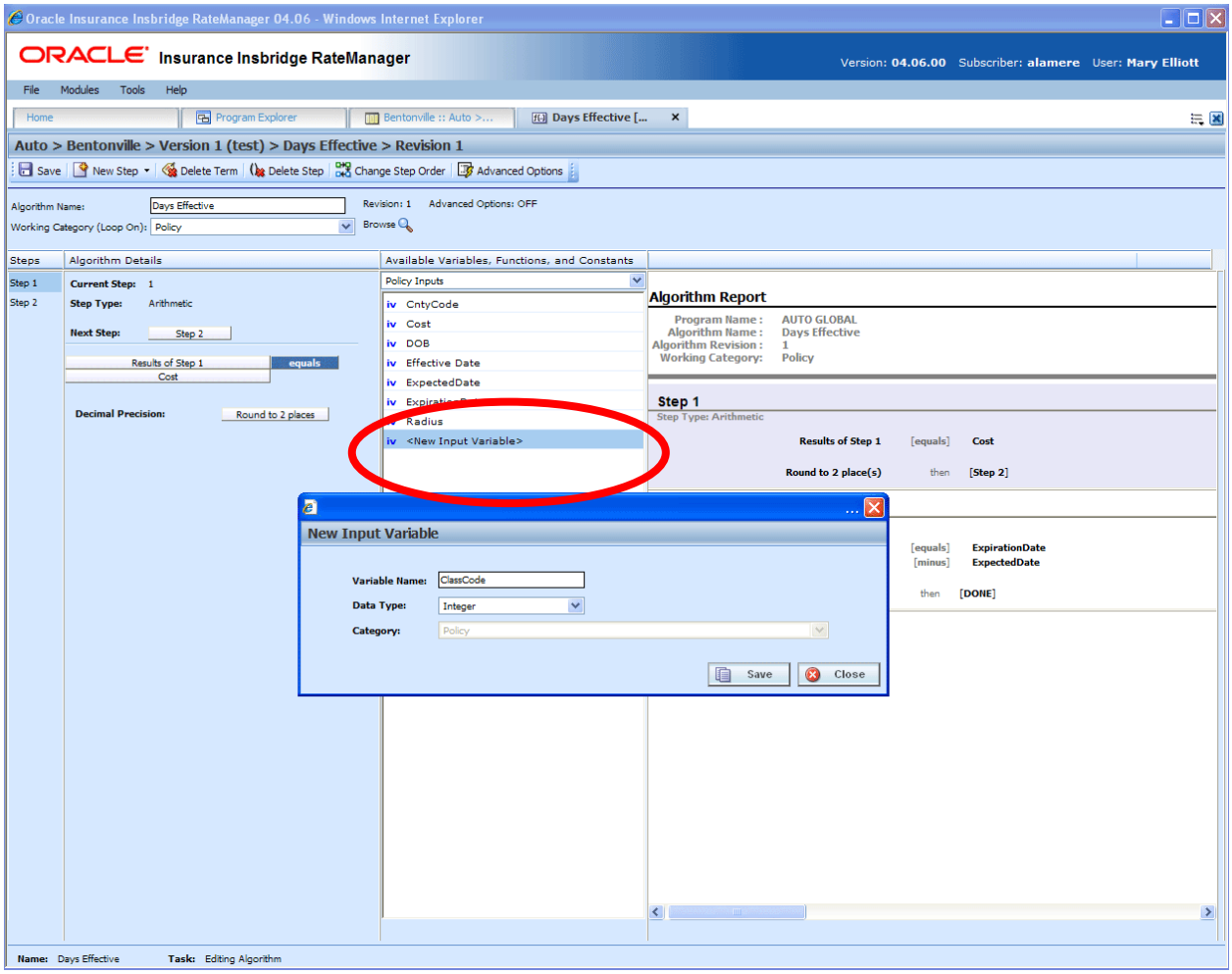


Figure 71 Adding an Input Variable

1. To create a new input, scroll down to the bottom of the inputs list. Select **<New Input Variable>**. The New Input Variable popup will be displayed.
2. Enter in a **Variable Name**.
3. Select the **Data Type**.
4. Click **Save** to save your entry. The popup window closes. Your new input variable is available for selection.

EDITING AN INPUT

Unlocked inputs can be edited at any time. If the input is locked because the program is locked, you must return to the program and unlock it. Once unlocked, changes can be made. If the input is locked because it came from a template, you cannot unlock it. System generated inputs are grayed out and are not available for editing at any time.

NOTE: *If a change is made to an input, the change affects all programs that use that input.*

To Edit an Input

1. Either double click the input you want to edit or right click and select **Edit**. This opens the **Edit Input Variable** popup.

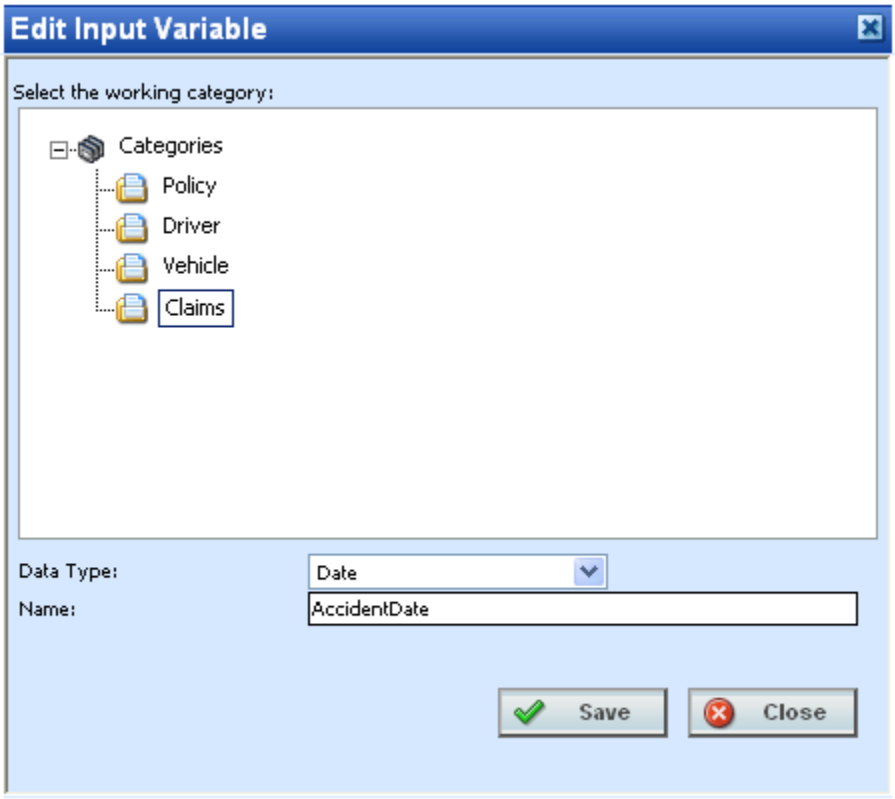


Figure 72 Editing Global Input Variable

2. To change the **Category**, double click the category where you want the input to be located. On the tree view, the final destination where the input will be placed will have a box around it.

3. Make any changes to the **Data Type** and **Name**.

4. Click **Save** to save your changes.

Copying an Input

Any unlocked input can be copied at any time. The input is copied with the exact same data type and category. To make a change to the input, you must go into the edit screen. System generated, template generated, and locked inputs cannot be copied. Names cannot be duplicated within the same category.

To Copy an Input

1. Right click the input you want to copy. Select **Copy**. The Copy Input Variable popup is shown.

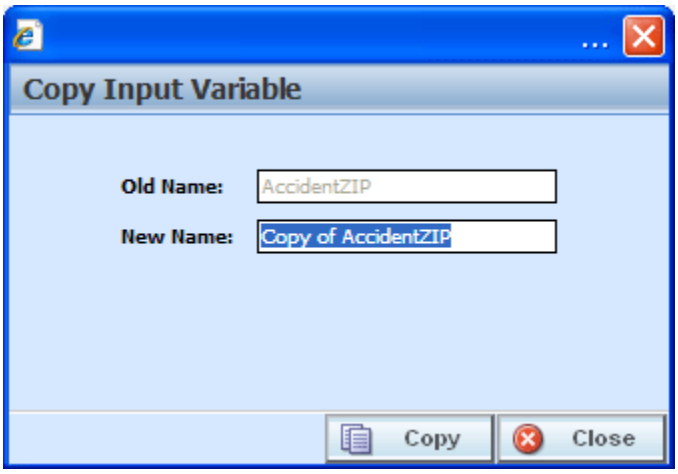


Figure 73 Copying Global Input Variable

2. Enter in a **New Name**.

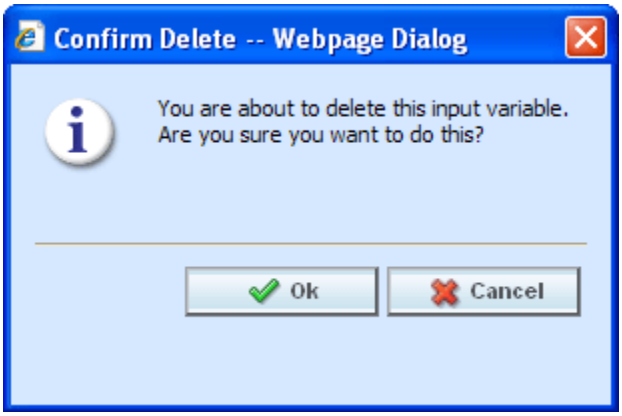
3. Click **Copy** to copy your input. The screen will refresh and the copied input is shown on the Program Details→Input tab. An XML ID is automatically assigned for the input.

DELETING AN INPUT

Any unlocked input variable that is not in use can be deleted. Inputs that are in use, locked, system generated, or template generated cannot be deleted. If you try to delete an input that is unavailable for deletion, an error message will be displayed informing you where the inputs are being used. Locked, system generated, and template generated inputs will be grayed out.

NOTE: *Take care when deleting Inputs, this action cannot be undone.*

1. Global inputs can be deleted by right clicking the input and selecting **Delete**.



2. A confirmation message is displayed.

3. Click **OK** to delete or **Cancel** to cancel. If the input is being used, you will not be able to delete. A message will be displayed informing you where the input is being used.

RESULT VARIABLES

When a variable is created under a specific program, it is referred to as a local variable. When a variable is created that applies to all programs under the subline, it is referred to as a global variable. Result variables can only be created at the global level. Global variables can greatly reduce the time taken to load and maintain the same tables or logic in multiple programs

Results variables generally hold the result of an action and can be used at any point in the system. When calculating a premium, the final result is usually a result variable. Result variables can also be used as placeholders for the end result of an algorithm. This includes premiums, underwriting rule messages and policy specific information such as tier name selected, and fees.

It is recommended that result variables be created prior to algorithms and calculated variables so that these elements will be in place for selection from the drop down listings when you need them in your calculation sequence.

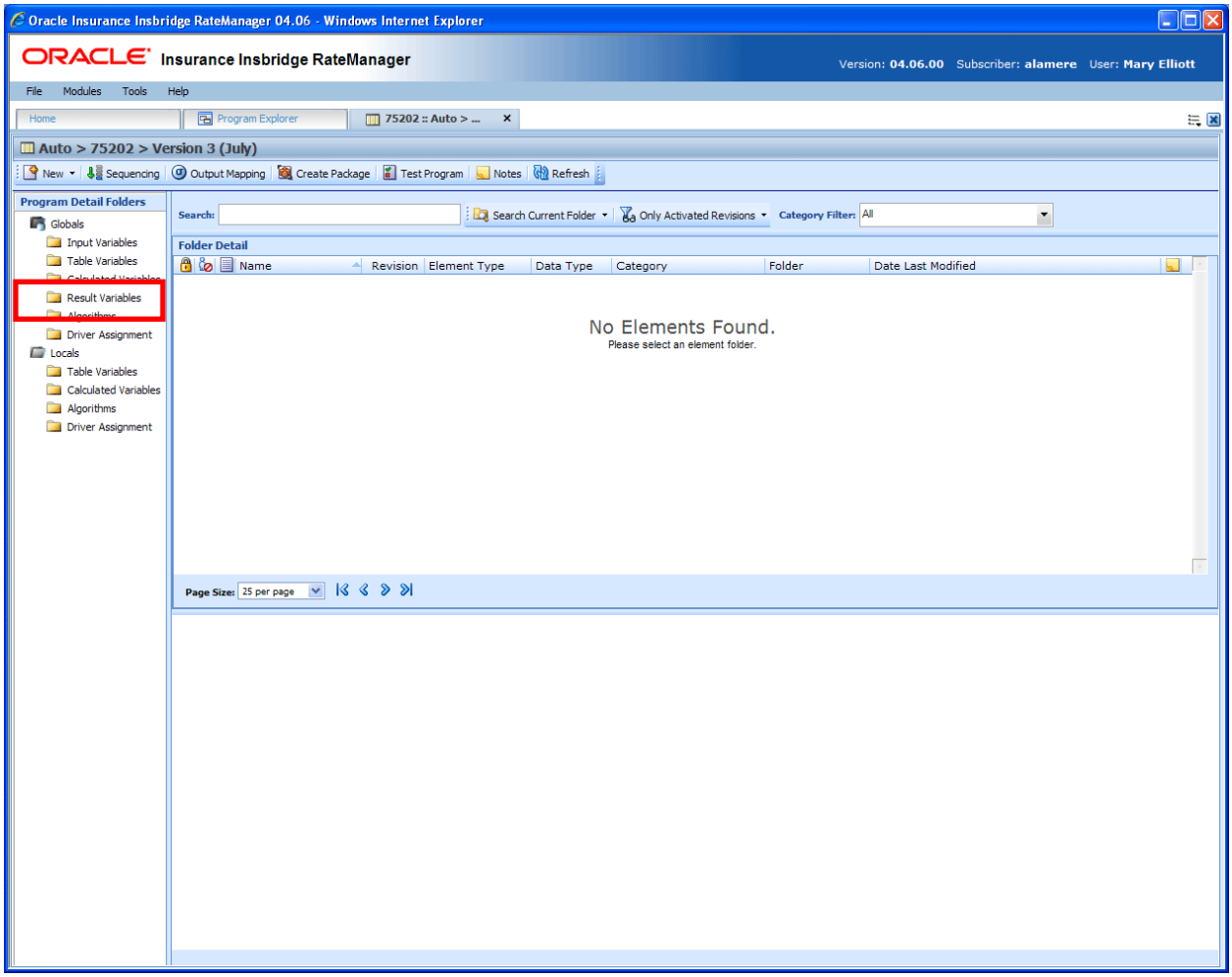


Figure 74 Selecting Result Variables

Result variables can be created by you or brought in from a template. Variables that are user created will be open for editing, copying, and deletion if they are not locked. Variables that were brought in from a template will be grayed out and locked at all times and cannot be unlocked. No editing or deleting will be allowed. This is to ensure the integrity of the template. New variables can be added to a template and copies can be made of locked variables. New variables and copies will be open for editing, copying or deletion.

Navigating to Result Variables

Result Variables will not be an option on the Program Explorer tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.

2. Select the Line of Business→Subline→Folder→Program → Program Version. You also can access Result Variables from the globals tab. Line of Business→Subline→Globals.

3. **Open** the program version to get the Program Details tab. Result Variables are available from the Program Details Folders area on the left hand side of the tab.

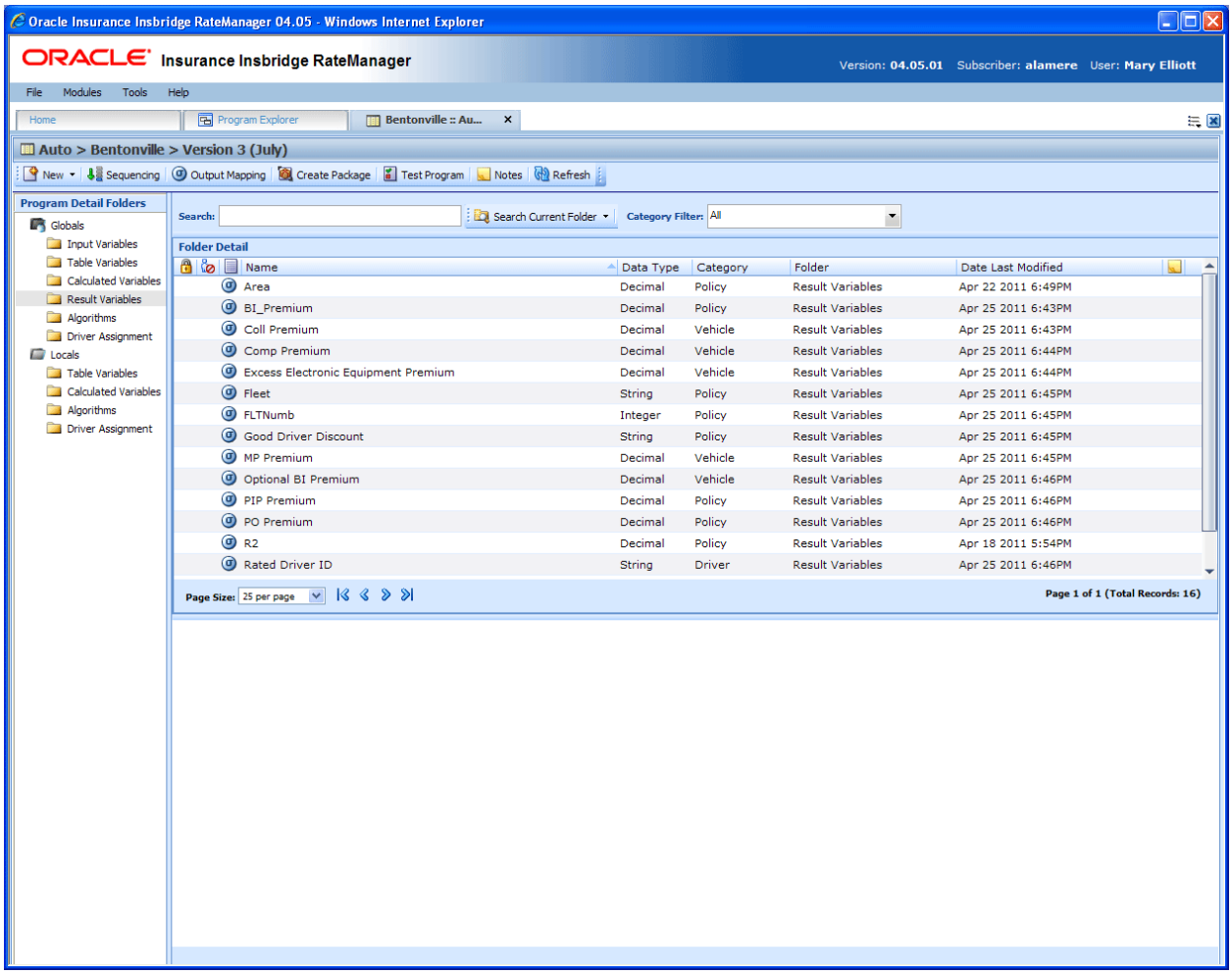


Figure 75 Result Variables Tab

FUNCTIONALITY

Functions can be accessed from the menu bar located at the top of the screen and from the right click menu of any unlocked result variable. The basic functions are:

- **New:** New result variables can be created at any time.
- **Edit:** Any unlocked, user created result variable can be edited at any time.
- **Copy:** Any unlocked, user created result variable can be copied at any time.
- **Delete:** Any unlocked, user created, unused result variable can be deleted at any time.

Functions:

The functions you can perform will depend on the status of the result variable. Locked result variables will have fewer options. There are icons that can tell you at a glance what the status of the result variable is.

Icon	What it Indicates
	Result Variable. Result variables are subline specific and can be created at the global level, from a program version, or from another program element. All result variables will be displayed on the Program Details→Result Variables tab. The same result variable listing will also be available for Subline→Globals tab. The same options, new, edit, copy and delete are available on either tab.
	Locked Result Variable. Locked result variables are not open for editing. A lock icon indicates that this result variable is locked by either a program or is system generated and is not open for copying, editing or deleting. If the result variable is locked because the program is locked, you must return to the program and unlock it. This will unlock the result variable and changes can be made. If the result variable is locked because it is system generated, you will not be able to unlock the result variable. You can create a new result variable if necessary.
	Template Lock. If the result variable is locked because it came from a template, you will not be able to unlock the result variable. You can create a new result variable if necessary.
	In-Use. Result variables that are in use are currently being worked on by another user in the system are not open for editing, copying, or deleting. The result variable will be available when the user exits the result variable.

FIELDS

The fields are the same for the Global Tab and Program Details. For more on field descriptions, please see Program Details→Fields.

Right Click Menu Options

To view right click menu options, highlight the result variable you want to view and right click. Unlocked result variables will have six right click menu options:

- **Edit:** Clicking Edit will bring up the edit screen for the result variable. Not available on program locked variables.
- **Copy:** Clicking Copy will bring up the copy screen for the result variable. Enter in a new name and the result variables will be copied and placed in the listing. Not available on program locked variables.
- **Delete:** Clicking Delete will remove the result variable from the list. A warning message will be displayed to confirm the deletion. Not available on any locked variables. You must have permissions to delete.
- **View Where Used:** Clicking View Where Used will display an information screen that details where the variable is being used. See View Where Used for more information. Available to all locked and unlocked variables.
- **View History:** Click to view the Audit History. This option will display a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. Not available on locked variables. This is an optional feature that must be enabled by the system administrator.
- **Notes:** Allows you to enter, edit and view notes for the result variable. Available to all locked and unlocked variables.

Template Locked result variables will have four options, Copy, View Where Used, View History and Notes.

Program Locked result variables will have three options, View Where Used, View History and Notes.

CREATING A NEW RESULT VARIABLE

In order to create a new result variable, you must have your categories setup. See Categories for more information.

Result variables can be created inside of an algorithm using available categories. If you need to create a result variable using a new category, you must exit the algorithm and create the new category. Then you can create the result variable using the new category from either the Result Variable Tab or inside the algorithm.

To Create a New Result Variable

1. On the Program Details tab, select Result Variables from the Program Detail Folders. Click **NEW** in the top bar menu. This will open the **New Result Variable** popup.

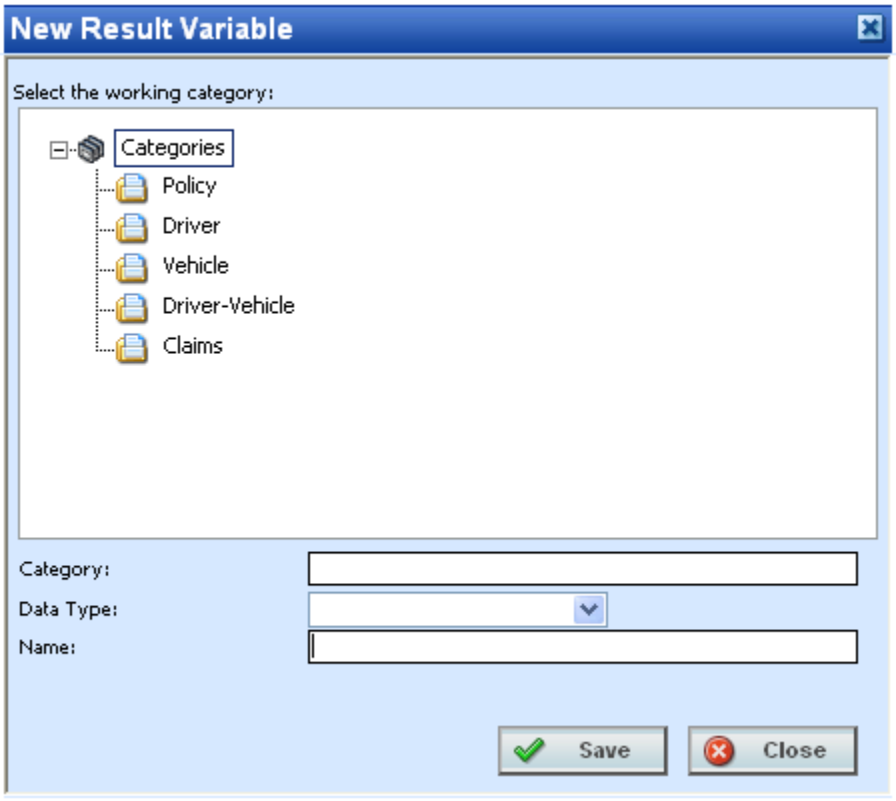


Figure 76 New Result Variable

2. Select the **Category Pathway**. The pathway will be displayed in the Category field. On the tree view, the final destination where the new result variable will be placed will have a box around it.

3. Select the **Data Type** (date, decimal, integer or string) from the menu.

4. Enter a **Name** for the new result variable.

5. Click **SAVE** when you are finished. The screen will refresh and the new result variable will be displayed on the Program Details→Result Variable tab.

Adding a New Result Variable from another Area

A new result variable can be created while entering or editing an algorithm without leaving the Edit tab. The category you can add the result variable to will be determined by the Working Category selection. Any result variable created here can be edited on the Result Variable Tab, if needed.

If the new result variable needs to be in a new category, you must leave the Edit tab and create the category in the Program Details→Globals tab and then return to the Edit tab or the Program Details tab to create your result variable.

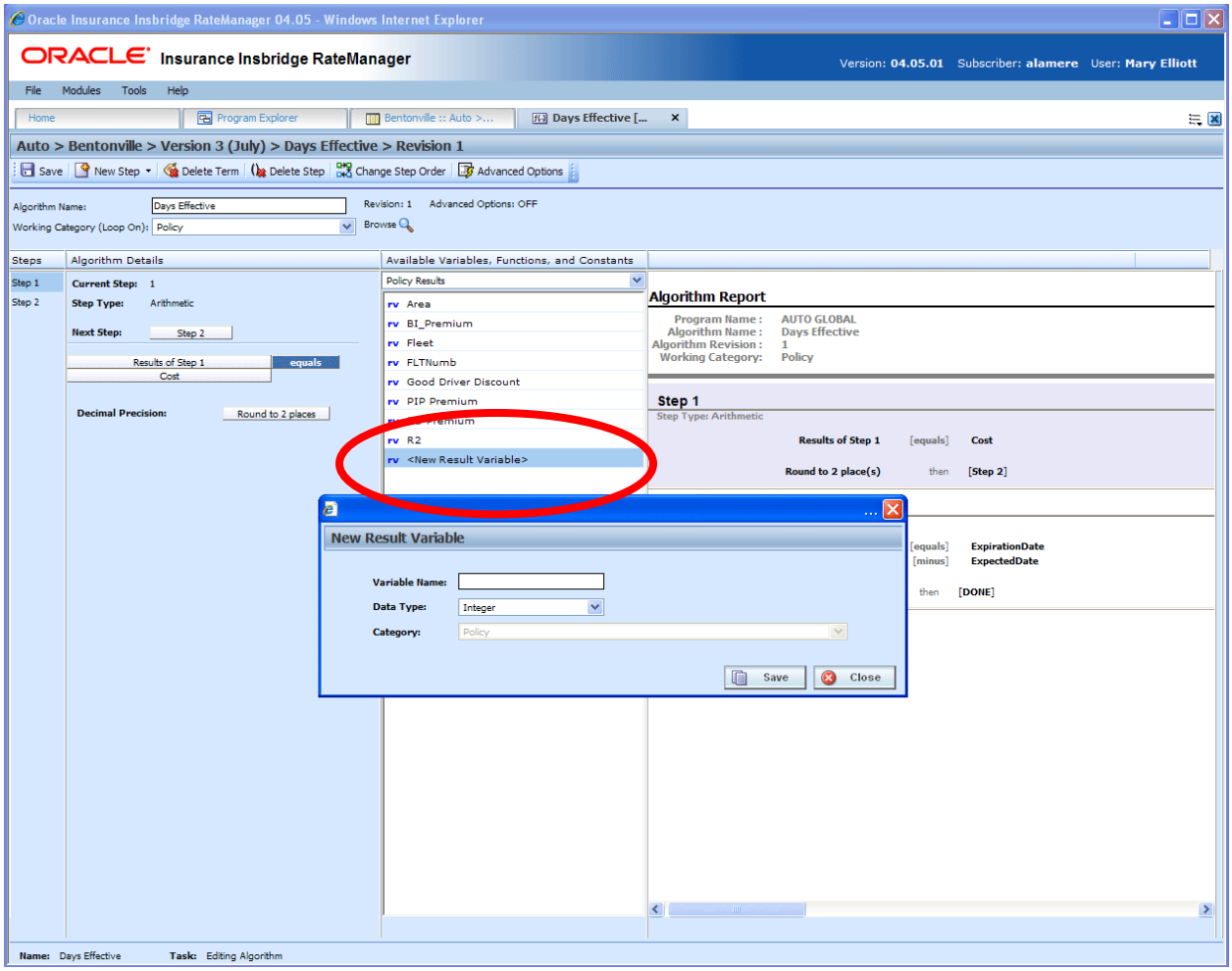


Figure 77 Adding a Result Variable

1. To create a new result variable, scroll down to the bottom of the category results list. Select **<New Result Variable>**. The New Result Variable popup will be displayed.

2. Enter in a **Variable Name**.

3. Select the **Data Type**.

4. Click **Save** to save your entry. The window will close. Your new result variable will be available.

Editing a Result Variable

Result variables can be edited from the Result Variable Tab or from a program variable listing screen and are edited like their local counterparts. Unlocked Result variables can be edited at any time. To edit a locked Result variable, you must return to the locked program and unlock it. Variables that were brought in from a template will be locked at all times and cannot be unlocked. A new variable can be created if necessary.

NOTE: *If a change is made to a result variable, the change affects all programs that use that result variable.*

To Edit a Result Variable

1. Double click the result variable you want to edit or right click it and select **EDIT**. This will open the **Edit Result Variable** popup.

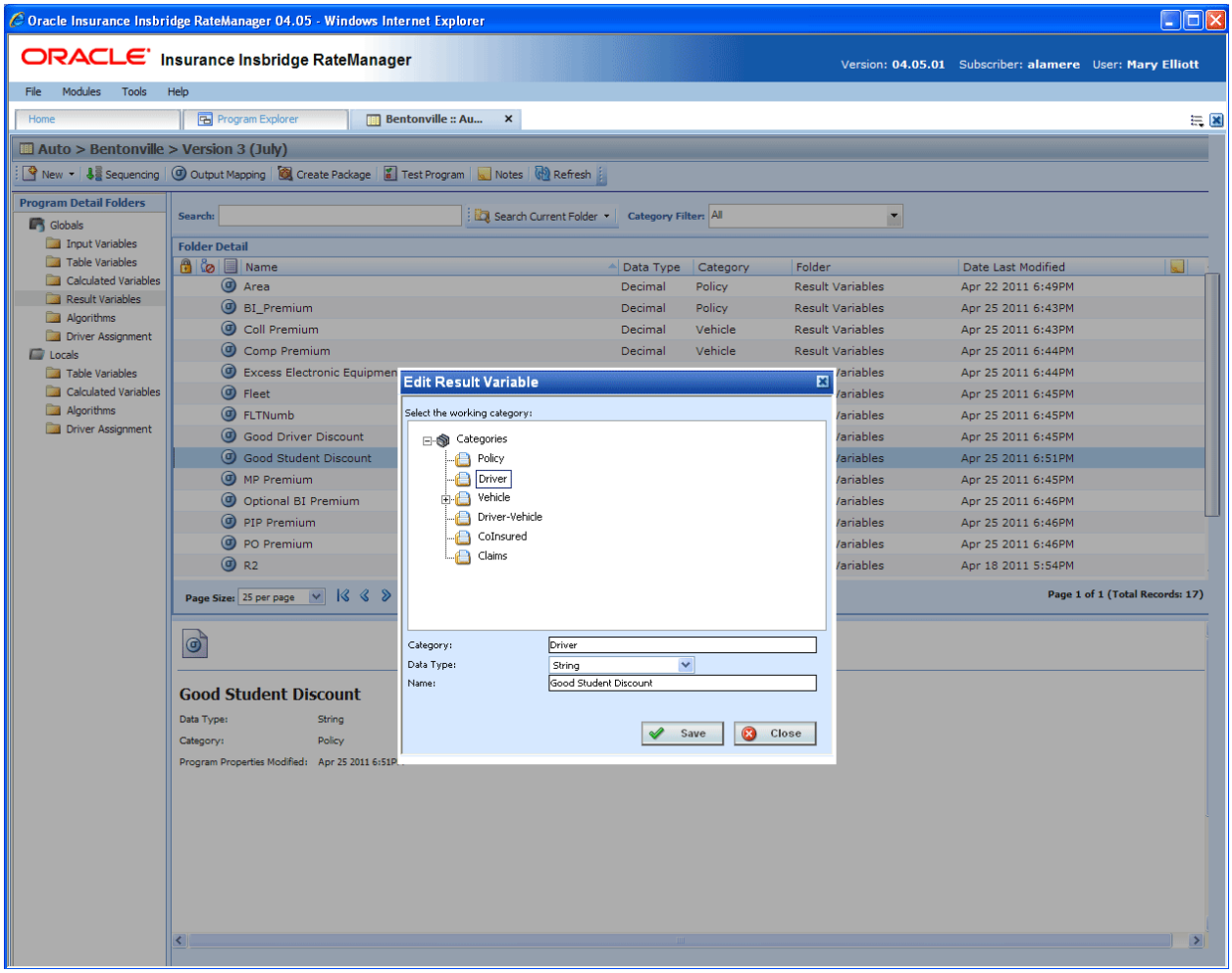


Figure 78 Editing Result Variable

2. To change the **Category**, double click the category where you want the variable to fall under. The pathway will be displayed in the Category field. On the tree view, the final destination where the variable will be placed will have a box around it.
3. Make any changes to the **Data Type** and **Name**.
4. Click **SAVE** to save your changes.

Copy a Result Variable

Any unlocked result variable can be copied at any time. The result variable will be copied with the exact same data type and category. The copied variable will be open for editing. To make a change to the variable, you must go into the edit screen.

A copied result variable will require a new name. No other information will be required.

To Copy a Result Variable

1. Right click the result variable you want to copy. Select **Copy**. The Copy Result Variable popup will be displayed.

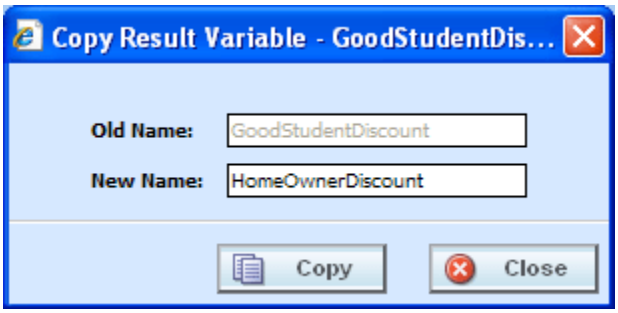


Figure 79 Copying Result Variable

2. Enter in a **New Name**.
3. Click **Copy** to copy your result variable. The screen will refresh and the copied result variable will be displayed on the Program Details→Result Variable tab.

Deleting a Result Variable

Any unlocked result variable that is not in use can be deleted. Result variables that are in use, locked, or template generated cannot be deleted. If you try to delete a result variable that is unavailable for deletion, an error message will be displayed informing you where the result variable is being used. Locked and template generated variables will be grayed out.

NOTE: *Take care when deleting result variables, this action cannot be undone.*

1. Right click the result variable you want to delete and select **Delete** from the menu.

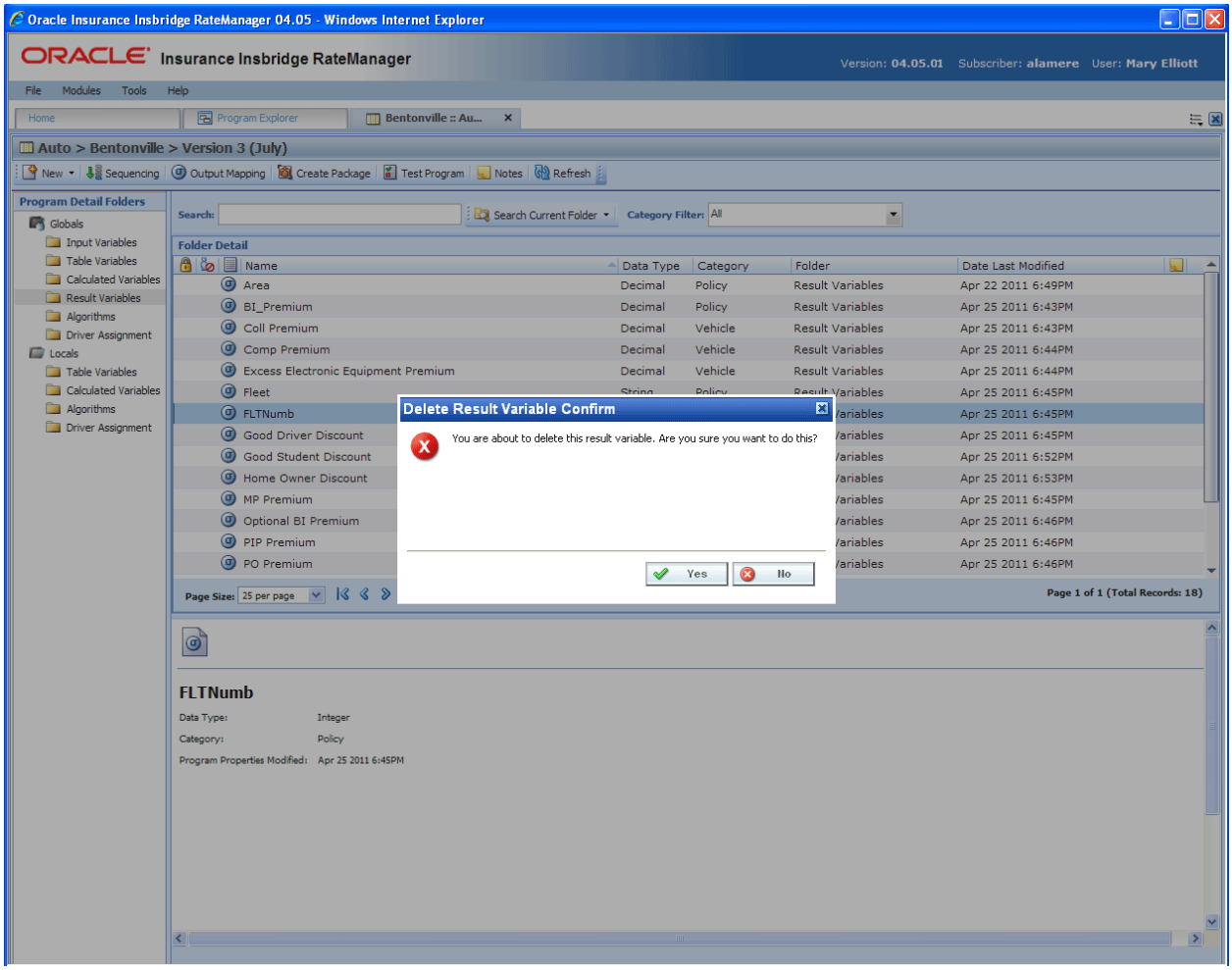


Figure 80 Deleting a Result Variable

2. A confirmation message will be displayed. Click **Yes** to delete or **No** to cancel. If the result variable is being used, you will not be able to delete. A message will be displayed informing you where the variable is being used.

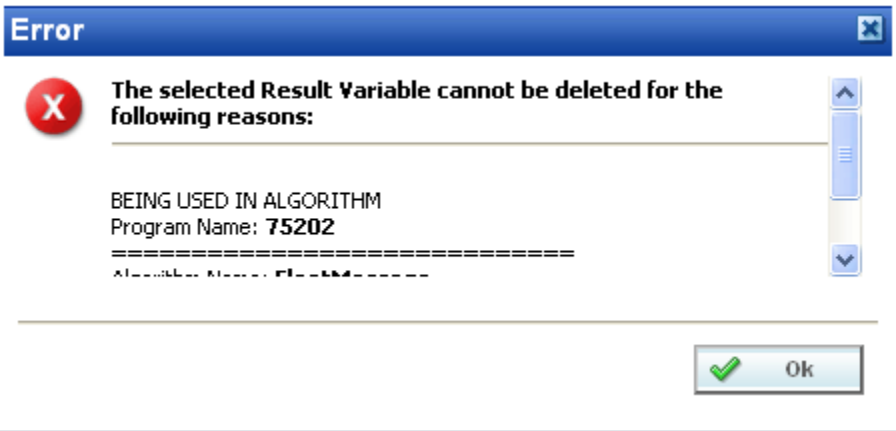


Figure 81 Result Variable Error Message

Chapter 13

TABLE VARIABLES

Variables are placeholders that get filled in during rating, based on inputs and other criteria. In RateManager, a table variable is a table based, or look-up variable. Any data that can be quantified in a table can be loaded into RateManager as a table variable. Common tables in a manual include territory codes, deductible factors and base rates. Also, rating data, such as credits and surcharges, can be defined in a table. It is usually advantageous to have as much rating data in a table as possible. Tables can be maintained and updated relatively quickly.

Table variables can be created and managed at two levels:

Global: Global variables are created and managed at the global level and are subline specific. Global variables can be accessed from the Global tab or from the Program Details tab. When selected, variables will be listed in the Folder Details area.

Local: Local variables are created and managed at the program version level and are specific to the program. Local variables can be accessed from the Program Details tab. When selected, variables will be listed in the Folder Details area.

There are a couple of differences between globals and locals. One difference between them is that global variables are available to all programs within the subline while program level variables are available only to the program where they were created. Another is that Global variables can use only global elements. Local variables can use either local or global elements.

Both Global and Local calculated variables can be template generated or created by you. Variables that are user created will be open for editing, copying, creating new revisions and deletion if they are not locked.

Template generated calculated variables will be grayed out and locked and cannot be unlocked. No editing or deleting will be allowed but they can be copied. This is to ensure the integrity of the template. New variables can be added to a template and new revisions can be created. These new variables will be open for editing, copying or deletion, unless the program version is locked.

TABLE VARIABLE OPTIONS

- Creating a new Table Variable
- Editing a Table Variable
- Copying a Table Variable
- Deleting a Table Variable
- Linked Variables
- Working with Table Data
- Creating a Table Variable Revision
- Changing the Active Revision of a Table Variable
- Deleting a Table Variable Revision

Navigating to Table Variables:

There are two paths to view and manage variables, either from the Globals tab or from the Program Details tab. The Global tab will display global variables only. You cannot view or manage local variables on the Global tab. On the Program Details tab, you can select to view either global variables or local variables. If you want to view and manage local variables, you must use the Program Details tab. The views and options are the same on either tab.

From either tab, when you select Table Variables in the Program Details Folder, the current table variables will be listed in the Folder Details area.

Table variables will not be an option on the Program Explorer tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.

2. Select the Line of Business→Subline→Folder→Program → Program Version. You also can access table variables from the globals tab. Line of Business→Subline→Globals.

3. Open the program version to get the Program Details tab. Variables are available from the Program Details Folders area on the left hand side of the tab.

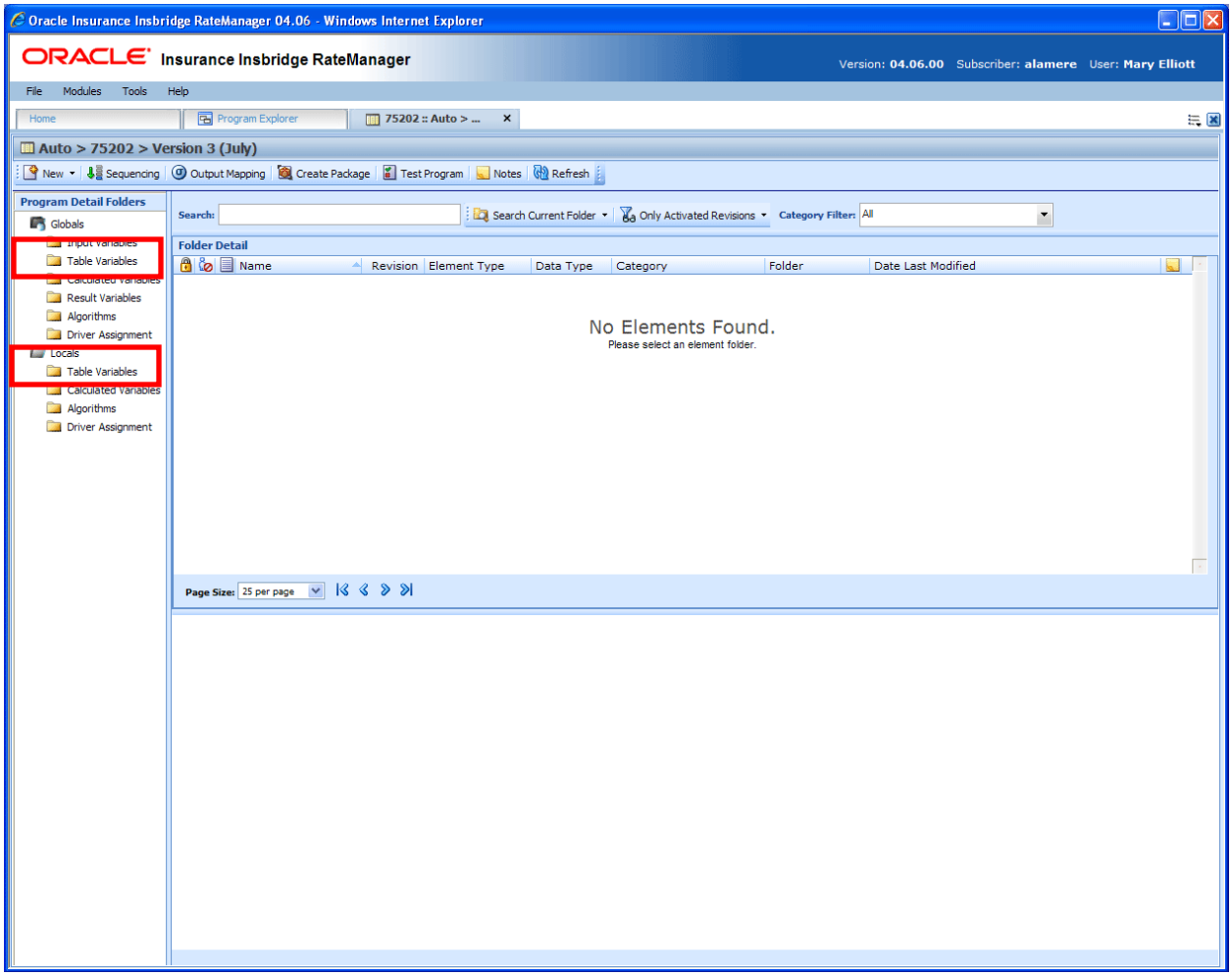


Figure 82 Table Variable Navigation

FUNCTIONALITY

On the Program Details tab, available functions can be accessed from the menu bar located at the top of the screen and from the right click menu of any unlocked table variable.

- **Table Variable Functions:** The copy and delete functions can be performed on the Program Details tab using a right click menu. Reports also can be generated using the right click menu on the Program Details tab.
- **Table Variable Revision Functions:** You will be able to view, copy, and delete table variable revisions. Active revisions can be set on the Program Details tab as well.
- **Table Variable Tab:** When you create a new table variable, edit an existing variable, work with table data, or work with revisions, you will be placed on the Table Variable tab.

Functions:

The functions you can perform will depend on the status of the table variable. Locked table variables will have fewer options. There are icons that can tell you at a glance what the status of the table variable is.

Icon	What it Indicates
	Table Variable. Global Table Variables are subline specific and can be created at the global level, or from a program version. Local Table Variables are program specific and can be created at the program version level. Local Table Variables will be displayed on the Program Details→Local Table Variables. The same variable listing will also be available for Subline→Globals tab. The same options, new, edit, copy and delete are available on either tab.
	Locked Variable. Locked table variables are not open for editing. A lock icon indicates that this table variable is locked by a program and is not open for copying, editing or deleting. If the table variable is locked because the program is locked, you must return to the program and unlock it. This will unlock the table variable and changes can be made.
	Template Lock. If the table variable is locked because it came from a template, you will not be able to unlock the variable. You can create a new table variable if necessary.
	In-Use. Variables that are in use are currently being worked on by another user in the system or variables that you have open in another tab are not open for editing, copying, or deleting. The variable will be available when the user exits the variable.
	Advanced Option. This variable has a wildcard applied to it.
	Active Revision. This variable is the current active revision.

FIELDS

The fields are the same for the Global Tab and Program Details. For more on field descriptions, please see Program Details→Fields.

TABLE VARIABLE TAB

The Table Variable tab will be available when you create a new table variable, edit an existing variable, work with table data, or work with revisions. You also can be placed directly on the Table Variable tab from the *My Recently Opened Table Variable* snap on your Home tab.

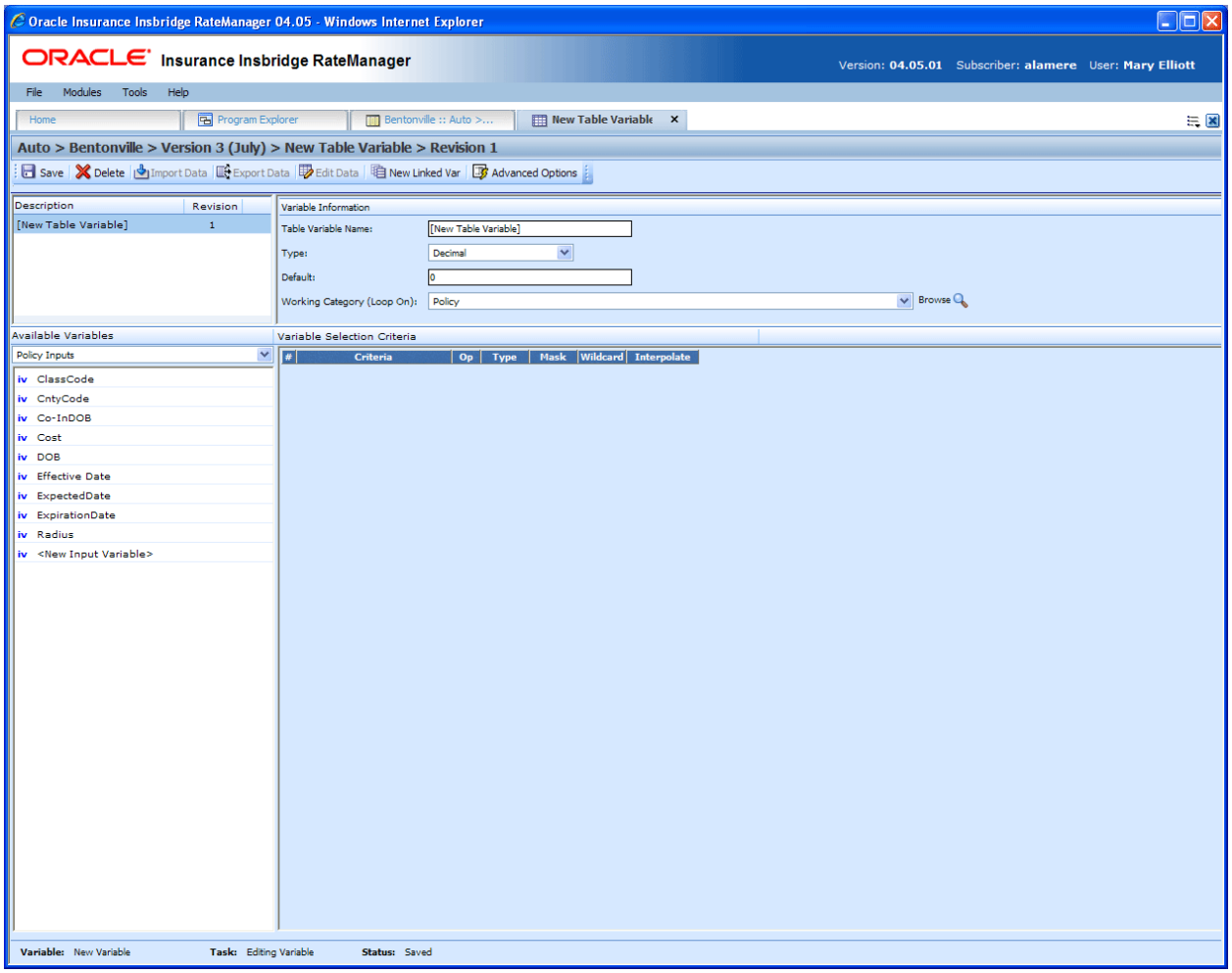


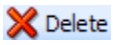
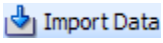
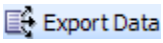
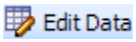
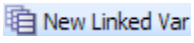
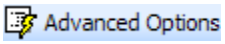
Figure 83 Table Variable Tab

FUNCTIONALITY

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

Functions:

Save	**Save:** Saves the table variable.

	**Delete:** Either removes the selected criteria from the table variable or deletes the selected linked variable from the program. If the variable is still being used in the program, you will receive an error message.
	**Import Data:** Allows the user to import a tab-delimited data file. See Importing a Table for more information.
	**Export Data:** Allows the user to export the contents of the current table variable or linked variables to a tab-delimited file. See Exporting Data for more information.
	**Edit Data:** Shows the data table for the current table variable. The data table can be used for verification and quick editing purposes. Data can be changed and rows added or deleted from this tab. See Editing Data in a Table for more information.
	**New Linked Var:** Creates a new table variable that is based on the same criteria as the currently selected table variable. The new variable will be "linked" with the current table variable and data can be updated simultaneously.
	**Advanced Options:** Allows you to change how RateManager handles fields that are NULLs/Wildcards. By default, RateManager attempts to make an exact match and in the absence of an exact match, RateManager will choose the row that has the most matches. Activate this option if you want RateManager to choose the first possible row, even if a better match exists later in the table. ***NOTE:*** *An advanced option is only available if at least one of the criteria has the wildcard option selected.*

NOTE: *If a change is made to a variable, the change affects all programs that use that variable. If a change only needs to be made to one particular program, create a local variable in the program and have the program reference the local variable instead of the global.*

FIELDS

There are four areas on the Table Variable Tab.

- **Linked Variables Listing:** If this is a linked variable, this area will list all the variables that are linked together. You can select the linked variable to view by clicking on the variable name.
- **Variable Information:** The variable information area contains the name and defines the data type, default value and working category of the table variable.
- **Available Variables:** The list of the available variables.
- **Variable Selection Criteria:** The criteria selection area is where you define what the variable is based upon. For example, if you have a territory code look-up that is based upon ZIP code, then you would select your ZIP code variable to be the criteria.

Linked Variables Listing

Linked variables are a group of table variables that are based on the same criteria. For example, if you had two different base rates that were both based off the same table of territory codes, then you could link these two variables.

When you create a linked variable, you do not need to define criteria. All linked variables will use the same criteria.

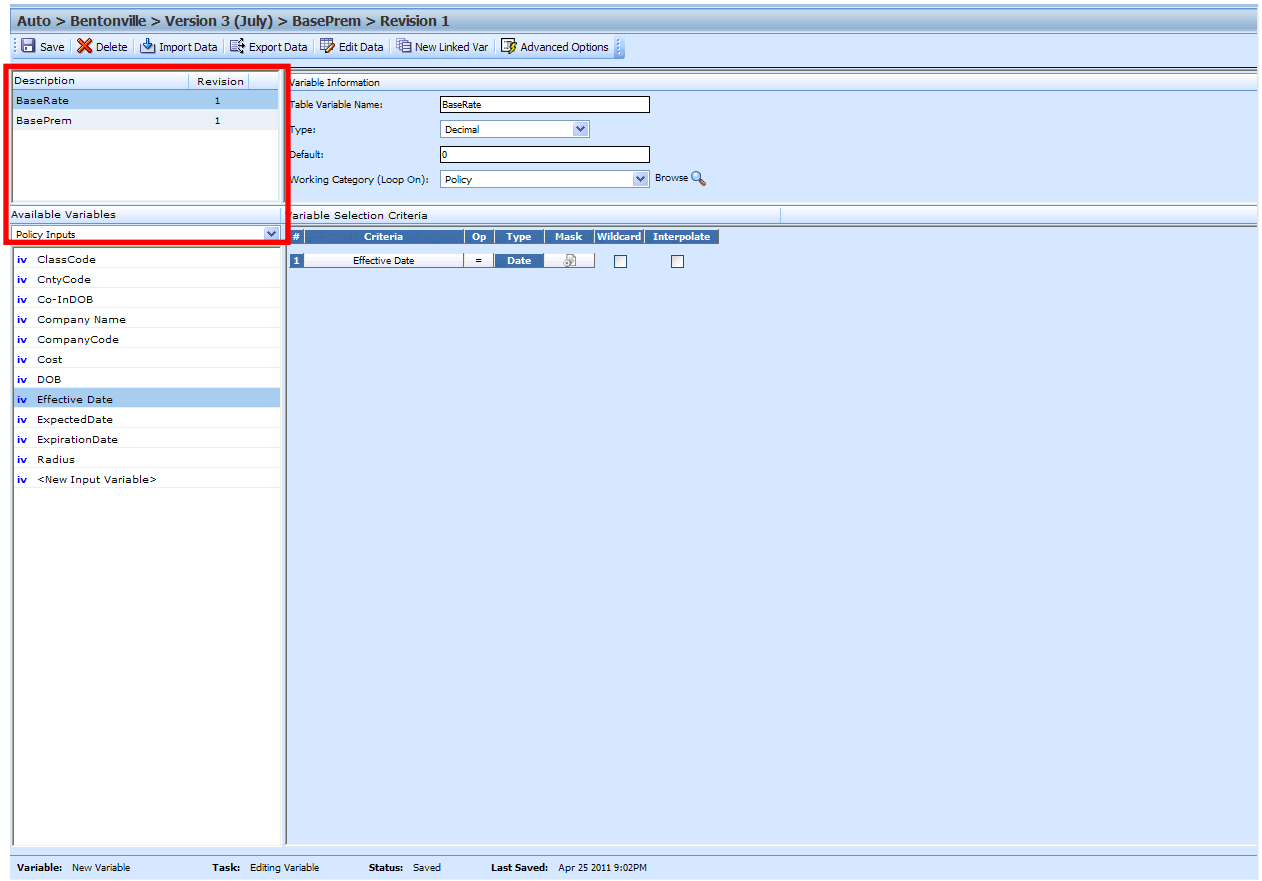


Figure 84 Table Linked Variable Field

Fields

Description: Displays the name of the current table variable and all other linked variables.

Revision: Displays the revision number of the current table variable and all other linked variables.

Variable Information

The variable information area is where you define the table variable.

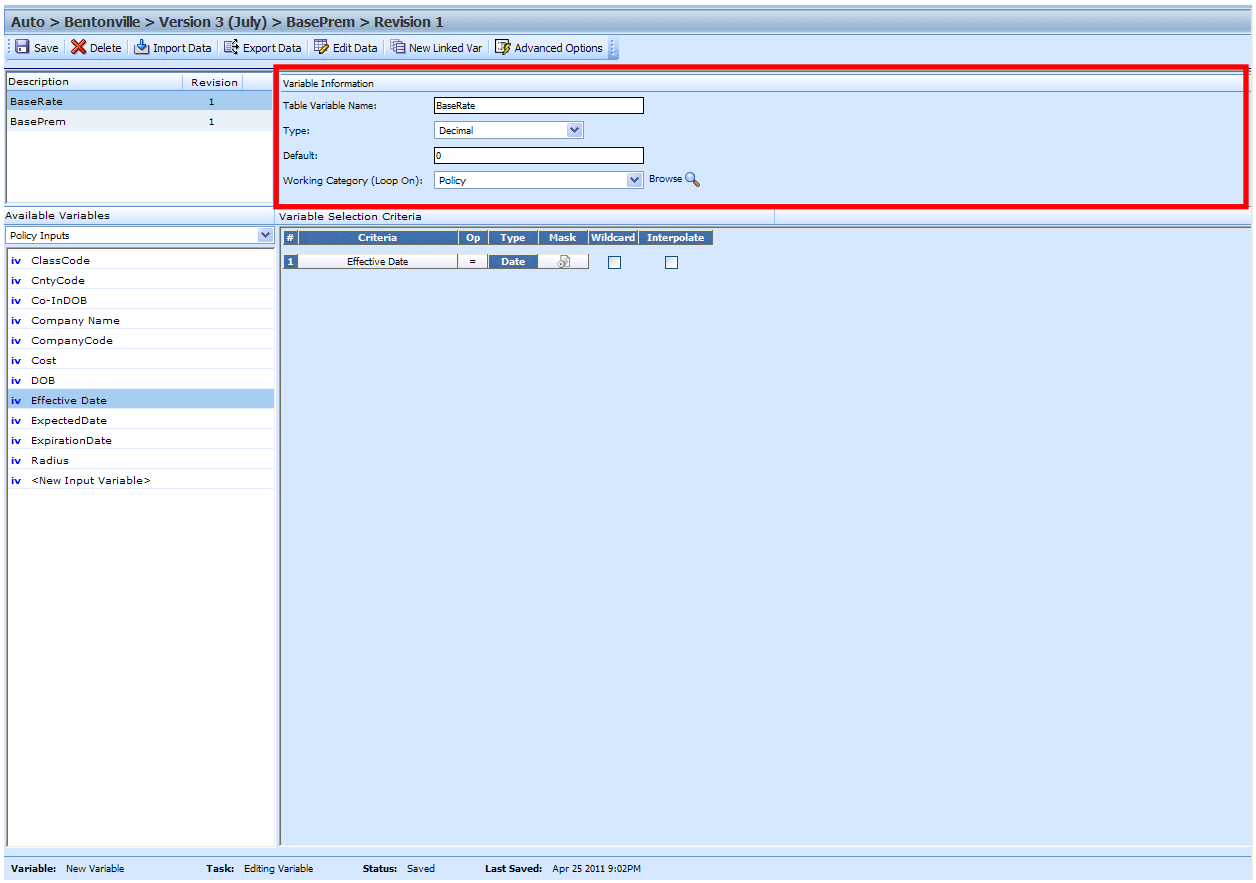


Figure 85 Table Variable Information Field

Fields

Table Variable Name: Entry for what you want the variable to be called. Alphanumeric characters are permitted, but no special characters (ex: &, *, ", +, @, etc) are allowed. In the case of linked variables, each variable will have its own name.

Type: Type of data associated with the variable. Options are:

- **Integer:** Used for whole numbers
- **String:** Used for any alpha numeric characters, including most special characters
- **Decimal:** Used for numbers with decimal points
- **Date**: Used for dates

In the case of linked variables, a different data type may be set for each. If disabled by the system administrator in the configuration file, the data type cannot be changed for any existing variables.

Default: Sets the default value of the variable. A default value is the value assigned to the variable if a match is not found in the variable table. If your table is designed so that there always is a match, then set the default value to either a very low number (0) or a very high number (999).

By setting the default value to an extreme number, you can see during testing that the table does not have a match.

You also can set the default value to a valid value. For example, if most of the cities in a state get a territory code of 1, then you could set the default value to 1, and only have entries in the table for the cities that have a territory code other than 1.

For linked variables, a different default may be set for each.

Table Variable Default Value will not allow:

Name	Character
Apostrophe	'

All other characters will be allowed in a table variable default value.

Working Category: Sets the category where this variable will be run. For example, if you have an auto test case with three vehicles, any variable set in the vehicle category will be run three times, once for each instance of the vehicle.

You can select the working category from the drop down menu or you can browse for a working category by clicking **BROWSE**. This will bring up the Browse Category popup. From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the working category section.

The Working Category determines the options displayed in the Available Variables area. For example, if you select Policy as the Working Category, then the menu choices in the Available Variables area will be Constants, Policy Inputs, Policy Variables and Policy Results. If you select Vehicle, the options will now include Vehicle Inputs, Vehicle Variable and Vehicle Results along with Constants, Policy Inputs, Policy Variables and Policy Results.

Available Variables

The Available Variables area contains a listing of available inputs, variables, and results, sorted by category and system constants that can be used as criteria. For global variables, only other global variables or inputs may be used. You cannot use any local variables in the creation of a global variable. A globe icon is used to indicate a global variable.

For Inputs, you will be able to add a new input variable without leaving the Edit Table Variable tab. Scroll to the bottom of the available variables list and select <New Input Variable>. A popup will be displayed that will allow you to enter a new input variable.

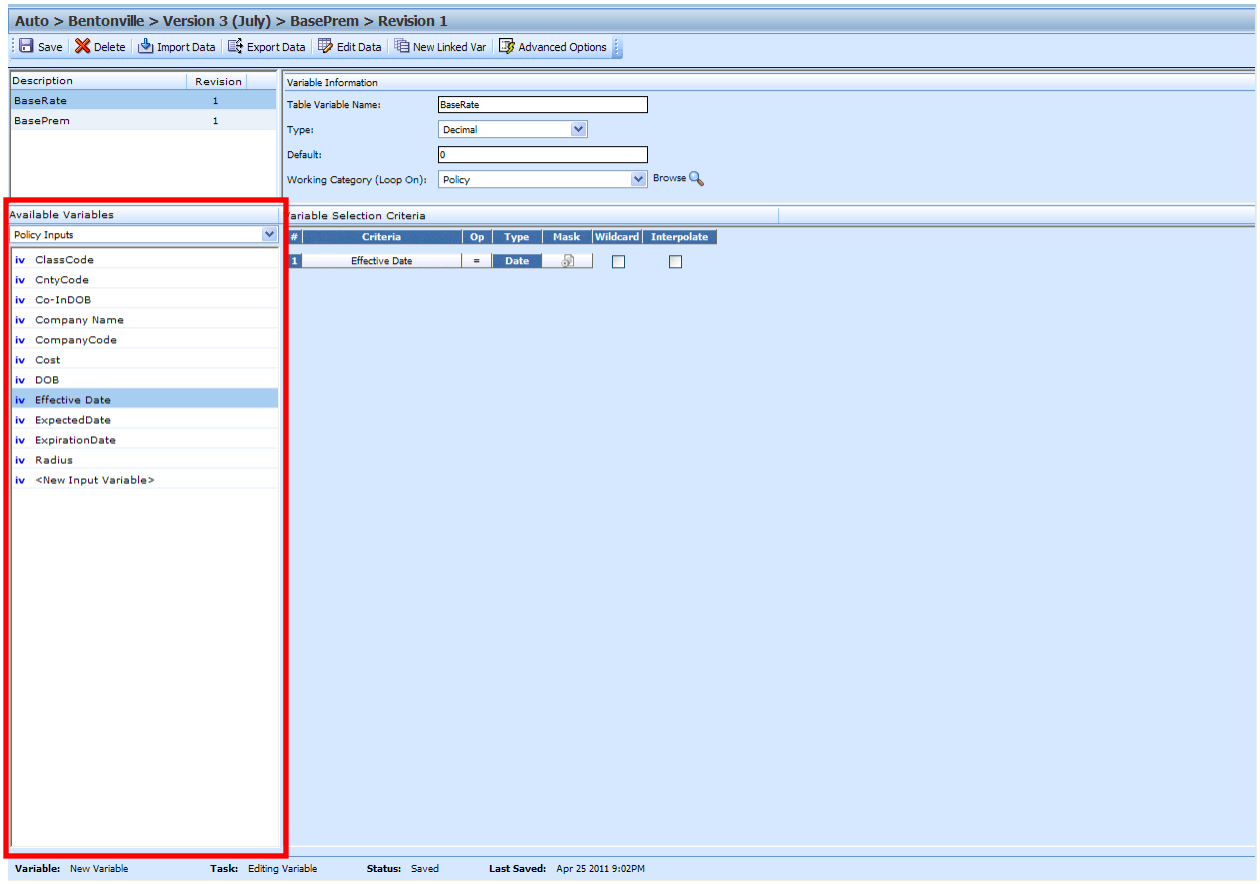


Figure 86 Table Available Variable Field

Fields

Menu: The menu is the top most field. Click the down arrow to select the category you want. Policy variables will be available for all categories. Driver and Vehicle categories will be available in the Driver-Vehicle category. Categories are determined in the Variable Information area.

Selection: The available variables will be listed based on the option you select from the menu.

Variable Selection Criteria

The criteria for the variable needs to be defined in this section. The Variable Selection Criteria determines whether or not this variable is used. The criteria available will be listed in the Available Variables area. You can select inputs, variables or results from a selected category or a system constant.

The order number, criteria, operator, and type will be populated with your selection. You cannot change the order number or the type. If you want the criteria listed in a specific order, you must select the criteria in the order you want. All criteria are used in assessing whether or not to use this variable.

NOTE: *A maximum of ten criteria can be added to a table variable.*

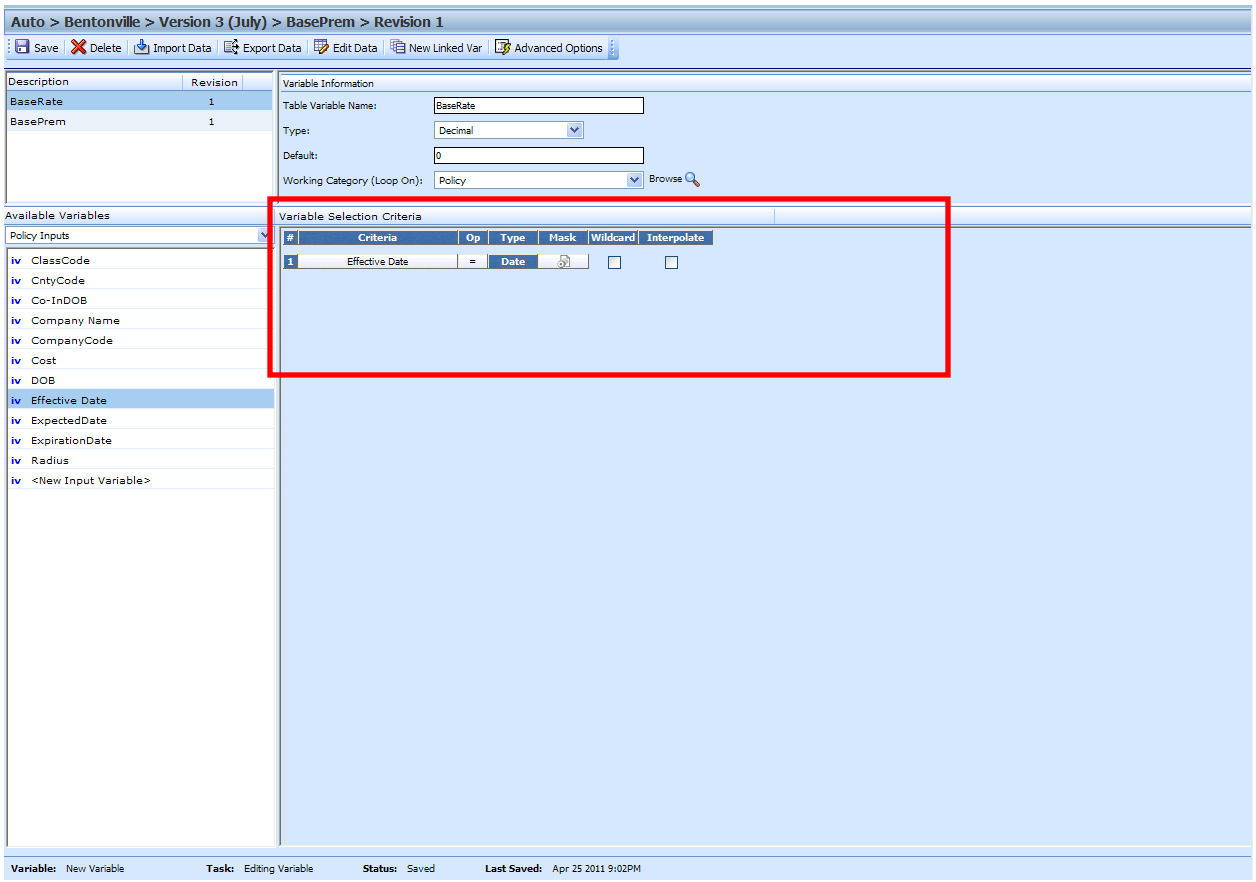


Figure 87 Table Variable Selection Criteria Field

Fields

#: Sequential order of criteria selected from **Available Variables**.

Criteria: Displays the name of each variable selected as criteria for this table variable.

Op (operator): Determines how the data in the table is used. If an operator of <= (less than or equal to) is used and the data table has a value of 5, the program will match on any input 5 or less. To change the operator, select the operator icon and choose a new operator. See Comparison Operators for more details. The default is equals (=).

The **operator** can be changed if needed. The operators **equals** and **not equals** are available for all data types, but only numeric criteria will have **greater than**, **less than**, **greater than or equal to** and **less than or equal to** as options. To see the available options, right click and select the operator you want. Arithmetic comparison functions such as less than (<) and greater than (>) cannot be used on string values. Only the operators of equal and not equal are available for string variables.

Type: Shows the data type of the criteria. The type of data in the table variable's table must match that of the criteria or an error will occur.

Mask: Determines how the data being passed into the program should be interpreted by allowing you to hold, remove or replace characters being passed. (Example: If you only wanted to accept the first, second and third characters of a VIN number being passed, this feature adds the ability to hold these characters and disregard the rest.) Click the icon to set the mask. See Masking for more information.

Wildcard: A check in this field tells the system that one or more rows in the table for this table variable will accept any value passed for these criteria. See Wildcard for more information.

Interpolate: A check in this field instructs RateManager to use interpolation to determine the correct value for the table variable. See Interpolation for more information.

NOTE: *When creating templates, do not use a table variable as criteria for itself. This may result in an error.*

Right Click Menu Options

The criteria and Op fields have right click menus. Right click the field you want to view to see the options.

Criteria have three options:

- **View Report:** You can view the table variable report.
- **View Where Used:** Displays where this variable is used.
- **Delete**: Deletes the variable.

Op has six options:

- **Equals** =
- **Not equals** <>
- **Less than** <
- **Less than or Equals to** <=
- **Greater than** >
- **Greater than or equals to** >=

VARIABLE SELECTION CRITERIA

The variable selection criteria can have one or more options applied to it.

Masking

Masking allows you to determine how the data being passed into the program should be interpreted. For example, if only the first five digits of the VIN number are needed, you can use the masking function to read only the first five characters of the value.

	NO Mask: No mask has been set for these criteria.
	Mask: A mask has been set for these criteria.

To Set a Mask

1. Click the mask icon . This will bring up the Mask Value popup.
2. Enter in the Mask Value.

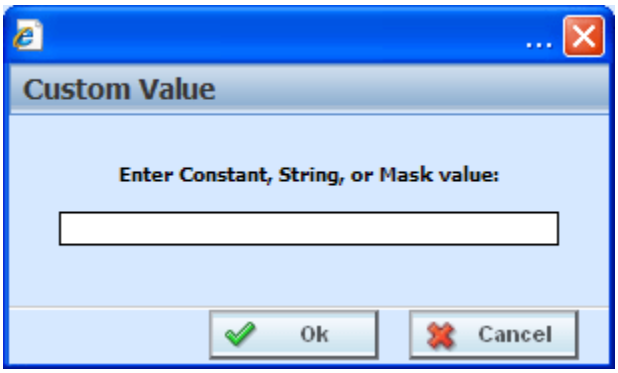


Figure 88 Mask Value Dialogue Box

3. Click **OK** to save the entry. You will be returned to the Edit Variable tab. The mask icon will now reflect that a mask has been set with a change in color .

Available Mask Options

Function	Definition	Keystroke(s)
Hold	Holds a character, i.e. keeps the character	~
Remove	Removes a character	|
Replace	Replaces a character with another character	Any character
Insert	Adds a character	^ + Any character

Examples

Function	Input	Mask	Result
Hold	GA263SX4597	~~~~~	GA263
Remove	VEH01	|||~~	01
Replace	Insbridge	~~~urance	Insurance
Insert	Cat	~^h~^r~	Chart

Wildcard

Wildcard is a function used when certain data in your table is only relevant in specific cases. For example, if Territory Code is determined by GaragingZip and, in some cases, ResidenceType, a value or an empty field could be used in the ResidenceType column.

The empty field signifies that anything being passed in this field is an acceptable match, as long as the wildcard option has been selected for that field. A specific value will only assign that territory if an exact match is made.

Wildcard Table

Territory Code	GaragingZip	ResidenceType
1	65478	2
2	65478	
3	65435	
4	65471	

If the Wildcard table above is used, only the exact input values of GaragingZip 65478, and ResidenceType 2 would produce a Territory Code of 1. GaragingZip of 65478 with any other ResidenceType will produce a Territory Code of 2.

WARNING: ***The wildcard function MUST be checked on the table variable tab if empty fields are used within the table. Otherwise, an incorrect match and error will occur.***

NOTE: *When importing data for a table variable, use an asterisk to signify a field that is wild carded. Asterisks help insure the data gets imported properly into RateManager.*

Interpolation

To interpolate means to estimate a value between two known values. For example, if you know that the Key Factor for a DwellingLimit of 10,000 is 2.00 and the Key Factor for a DwellingLimit of 20,000 is 3.00, you can use interpolation to figure out that the Key Factor for a DwellingLimit of 15,000 is 2.50. But what is the Key Factor for a DwellingLimit of 13,500? To find the Key Factor, input your table with the known values and select the checkmark under **Interpolate** next to the criterion you want to interpolate.

Here are the steps used to calculate the Key Factor for a DwellingLimit of 13,500 from the example.

Steps	Action
1. Calculate the difference between the known Key Factor's to get a factor per 10,000 (since the difference between 10,000 and 20,000 is 10,000)	3.00 - 2.00 = 1.00
2. Divide the factor per 10,000 by 100 to get a factor per 100	1.00 / 100 = 0.01
3. Determine the number of 100's between 13,500 and 10,000	13,500 - 10,000 = 3,500 / 100 = 35
4. Multiply the factor per 100 by the number of 100's	0.01 x 35 = 0.35
5. Add the increased factor to the Key Factor for 10,000	0.35 + 2.00 = 2.35
The Key Factor for a DwellingLimit of 13,500 is	**2.35**

Usage

- Interpolations should be applied to non-linked variables only. Linked variables may not function as expected.
- Interpolate should not be used in combination with wildcard. Conflicts may arise when combining a wildcard with an interpolated value.
- Only one variable selection criteria element should have interpolation applied.
- Interpolation will only work with integers and decimals. The criteria has to be a number, and the table itself has to be a number. You cannot interpolate on a string or date.

CREATING A TABLE VARIABLE

When you create a new table variable, it gets created in all versions of a program. Table variables can be added to both standard and templates programs. There is no limit to the number of variables that can be created for a program.

Creating a Table Variable

1. On the Program Details tab, Select **NEW** from the menu bar and then select **Table Variable** for the type of variable you would like to create, Global or Local. The Table Variable tab will open.

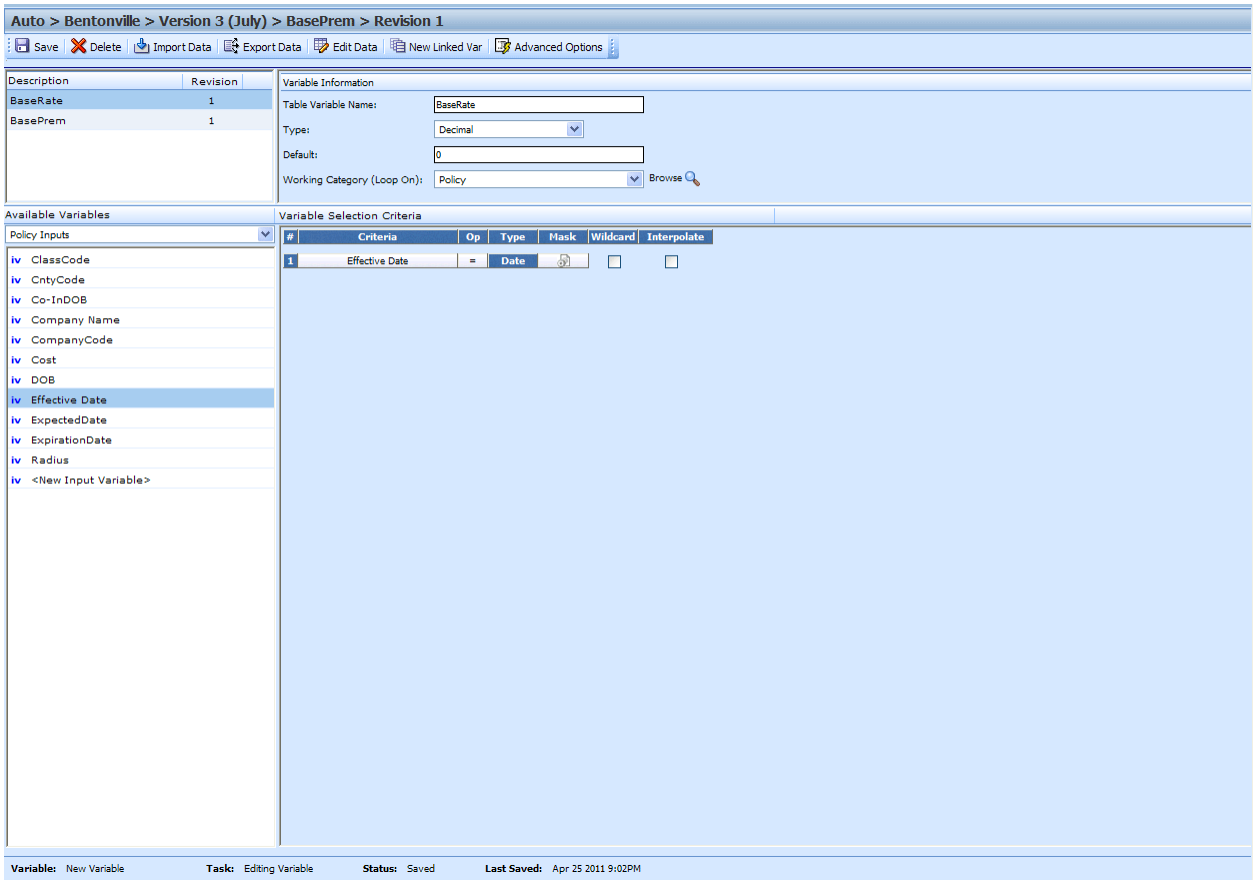


Figure 89 Creating a Table Variable

2. Enter in a **name**. Alphanumeric characters are permitted, but no special characters (ex: &, *, ", +, @, etc) are allowed. In the case of linked variables, each variable will have a unique name.

3. Select the **type** of data associated with the variable. Options are:

   - **Integer**
   - **String**
   - **Decimal**
   - **Date**

In the case of linked variables, a different data type may be set for each. If disabled by the system administrator in the configuration file, the data type cannot be changed for any existing variables.

4. Set the **default value** of the variable. The Default Value must match the data type selected and the field is limited to 50 characters.

5. Select the **working category**.

6. In the Variable Selection Criteria area, select an **available variable** from the drop down menu and double-click it. This will add it to the variable selection criteria area. You can enter up to 10 criteria.

7. If you want to apply a **mask**, click the mask icon. See Masking for more information.

8. Check the **wildcard** box for any variable where you want the system to accept any passed criteria. See Wildcard for more information.

9. Check the **interpolate** box if you want to use interpolation to determine the correct value for the table variable. See Interpolation for more information.

10. Click **Save** to save your work.

LINKED VARIABLES

Linked variables are a group of table variables based on the same criteria. For example, if two different base rates were both based off the same table of territory codes, these two variables could be linked. RateManager supports a maximum of 100 variables associated with one single table. This means that a linked variable can have itself and 99 other variables.

Variables can be linked at the time you create them or you can enter new linked variables to an existing variable at a later time on the Edit Table Variable tab. Existing variables cannot be linked together. For example, if you created Table Variable A and then created a separate Table Variable B, you will not be able to link them together.

Creating a Linked Variable

1. Select the table variable you want to add a linked variable to. Right click and select **EDIT**. This will open the Edit Table Variable tab. If you are creating a new table variable, you can add a linked variable at any time in the create process.

2. Click **New Linked Var** from the top bar menu. The Variable Information area at the top right hand portion of the tab will refresh. Another variable will be added in the Linked Variable Listing at the top left hand portion of the tab.

3. Enter in a name, select the data type, a default, and the working category.

4. Click **SAVE** to save your work.

EDITING A TABLE VARIABLE

The **Edit Variable** tab allows you to change information about the variable such as the name, data type, default value, working category and variables used as selection criteria. It also allows you to edit the data table, import a table, export the table and create new linked variables.

Variables that are grayed out or locked cannot be edited. Template generated variables that are using revision 1 are not open for editing. If you want to edit a template generated table variable, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed.

To Edit a Variable

1. On the Program Details tab, select the **Table Variable** you want to edit.
2. Double click or right click and select **EDIT**. The Table Variable tab will open with the details of the table variable.
3. Make any changes to the variable information or table.
4. Click **SAVE** to save your work.

COPYING A TABLE VARIABLE

Table Variables may be copied within any program. In your default subline you can copy a table variable to another program within the subline. Template sublines will allow you to copy within the same program only. When copying a table variable, there are four possible copy options, depending upon your selection:

- **Current Program: Copy Definition Only:** Only the variable definition, the structure of the table variable (including the data type, default value, working category and criteria definitions) will be copied, but not the data, within the current program.
- **Current Program: Copy Definition & All Data:** The table variable and all associated table data will be copied to the new variable within the current program.
- **Other Program: Copy Definition Only:** Only the variable definition, the structure of the table variable (including the data type, default value, working category and criteria definitions) will be copied, but not the data, into another program within the same subline that you chose. This option is only for local table variables within your default subline.
- **Other Program: Copy Definition & All Data:** The table variable and all associated table data will be copied to the new variable into another program within the same subline that you choose. This option is only for local table variables within your default subline.

All linked variables associated with the variable may be copied by checking the **Copy linked variables** check box on the copy table variable popup. All linked variables will be copied with the name COPY OF… You will not be allowed to change the copied variable name on the copy table variable popup. You can rename the variables using the edit option.

If you do not choose to copy all linked variables, the system will only copy the linked variable that is being used in the variable you are copying. All other associated variables will not be copied.

To Copy a Table Variable

1. Select the variable you want to copy and right click it. Select **Copy Variable** and a separate popup window will be displayed.

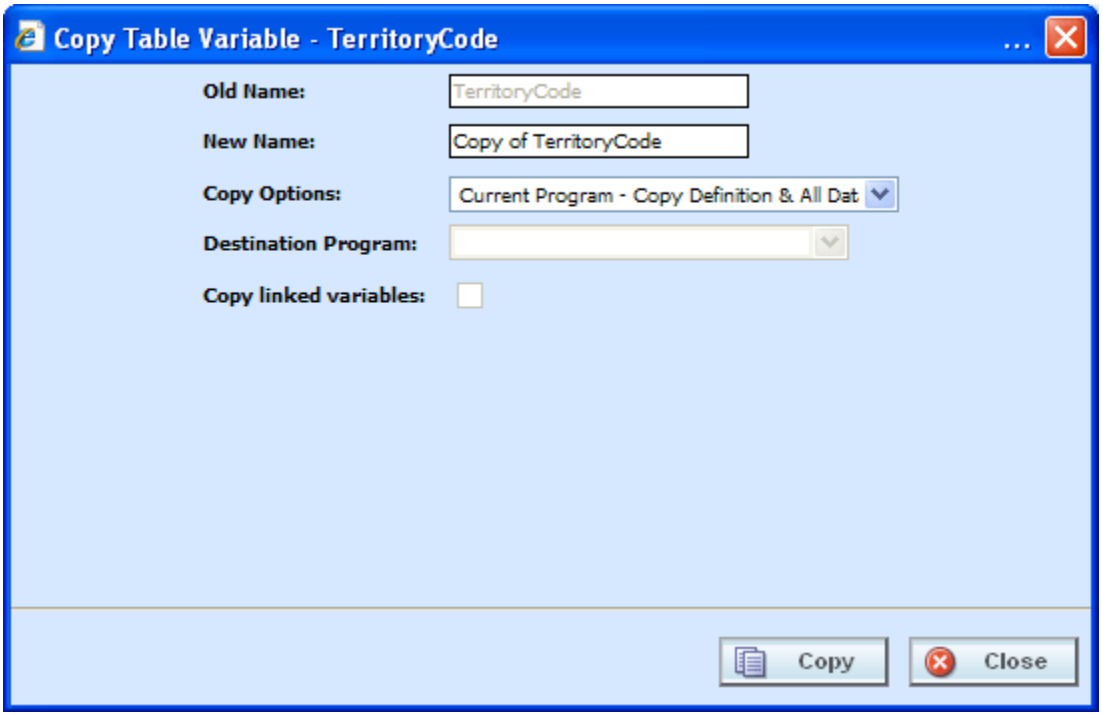


Figure 90 Copy Table Variable Popup

2. Enter in a **New Name**.

3. Select the **Copy Options**.

4. If you are copying a local table variable within your default subline, you can select to copy the variable to another program within the same subline. Select the **Destination Program** from the drop down menu.

   If you are in a template generated subline, this option will be grayed out.

   If you are in a global table variable, this option will not be displayed.

5. If there are linked variables and you want to copy them all, check the **Copy Linked Variables** box. If this option is grayed out, no linked variables are available to copy.

6. Click **COPY** to copy the variable.

7. If the copy was successful, you will be returned to the previous tab. Your variables will have been copied. The last updated date will be the date the copy was made.

DELETING A VARIABLE

When a variable is no longer needed, it can either be left in RateManager or deleted. When you delete a variable, it gets deleted from all versions of the program. Also, all revisions of that variable get deleted. If you are uncertain as to whether the variable will be used again, simply leave it in RateManager. This will save time if the variable is needed and won't slow down rating.

Deleting a Variable

1. Select the variable you want to delete. Right click it and select **DELETE**.

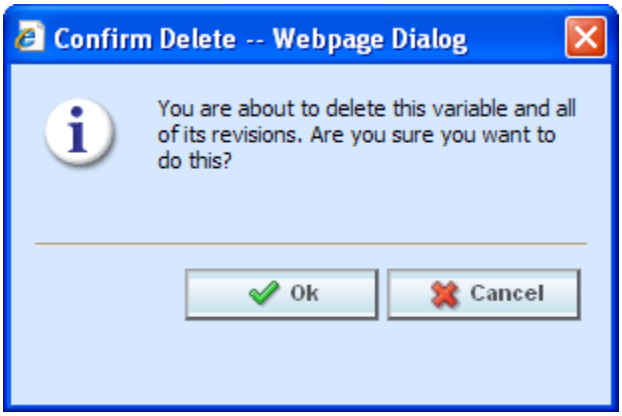


Figure 91 Deleting a Variable

2. You will be asked to confirm the deletion of the variable. Click **Ok** to delete the variable. Click Cancel to return to the tab without effecting a change.

If you try to delete a variable that is still being used by an algorithm, a result group or another variable, you will receive an error. Variables that are locked or that are template generated cannot be deleted.

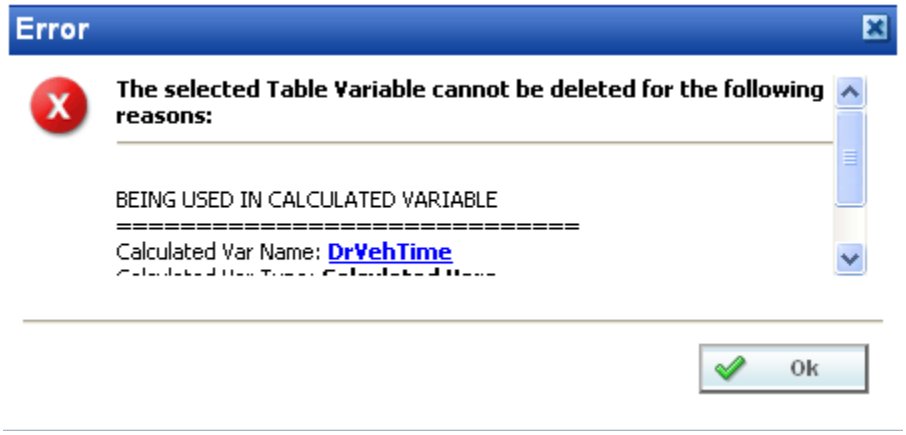


Figure 92 Error when Deleting a Variable

If you delete a linked variable, only the variable you have selected will be deleted. The other variables that are linked to it will not be removed.

WORKING WITH TABLES

Data can be imported or entered in directly into an unlocked table variable. Data also can be exported out of a table variable at any time. Data is entered and edited on the Table Variable tab. Data can be exported from either the Table Variable tab or by right clicking a table variable on the Program Details tab and selecting Export Data.

There are three buttons on the Table Variable tab to help you with managing data:

- **Import Data**: Used to import data into a table
- **Export Data**: Used to export data out of a table
- **Edit Data**: Used to edit existing data or to enter new data

IMPORT DATA

In order to import data into RateManager, you need an import file. Import files are tab-delimited text documents, i.e. columns are delimited (separated) by a tab character. Tab-delimited files can be created using a spreadsheet such as Microsoft Excel or a text editor such as Notepad.

An import file holds the data for a table variable. It is important that the structure of the import table match the structure of the table variable. A few rules should be followed when creating an import file:

- The file must be saved in tab-delimited format using a .txt extension.
- Each result or look-up in the file must be in its own row.
- The first row in the file must contain column headings.
- Each column heading must be unique.

NOTE: *The columns of data do not have to be in any particular order. During the import process, you will be able to match the columns in the input file with the variables and criteria in RateManager.*

Restricted Use of Special Characters

A table variable file name is the actual name of the file that will be imported into RateManager or exported out of RateManager. For example, 'BI_Rates4-2011.txt'. Table Variable File Names cannot contain:

Name	Character
Ampersand	&
Apostrophe	'
Asterisk	*
Backslash	\
Colon	:
Greater-Than Sign	>
Less-Than Sign	<
Question Mark	?
Quotation Mark	"
Slash	/
Vertical Bar	|

If you attempt to import a file with a restricted character, you will receive an error message.

All other characters will be allowed in a table variable file names.

Table variable data files are the contents inside the file to be imported into a table variable or exported out of RateManager. Table Variable Data Files will be rejected if restricted characters are contained within the file.

Restricted Characters are:

Name	Character
Apostrophe	'
Tilde	~
Bar + H	|H
Bar + h	|h
Bar + L	|L
Bar + l	|l

All other characters will be allowed in a table variable data file with some considerations:

- Asterisk (*) must be inside a string (p**l). A single asterisk will be considered a wildcard and will be removed. The field will display as blank.
- Quotation marks may be placed around commas. This depends upon the source where your data was created. You can preview your data before importing to visually inspect it. RateManager will not remove quotation marks prior to importing.
- Quotation marks (“) and ticks (`) may not always import properly. It is recommended that you avoid using these characters if possible or only use these characters inside a string (an`s).

Data can be imported into any unlocked table variable at any time.

Data Preparation:

Before importing, look at your table and decide what data you want to import and what type of data it is. You also must decide how you want to use the information in the table. Each column in your table can be brought in as variable selection criteria or as a linked variable.
If the data is based on the same selection criteria, you may want to create linked variables. If the data in your table determines the value to be used, you may want to use inputs or variables as selection criteria.

For example, if you have two different rates (Rates A and B) that are both based off the same territory code (TerCode), you could create a table variable (RateA), then create a linked variable (RateB) and use selection criteria input (TerCode). Or you could create a single table variable (RateA) the uses selection criteria input (TerCode) and another separate table variable (RateB) that also uses criteria input (terCode). In the case where you create two separate table variables, you would have to import your .txt file twice; once to input the data for RateA and a second time to input the data for RateB.

You also may have two territory codes (TerCodeA and TerCodeB) that are used to select a base rate (RateA), you could create a table variable (RateA) with two selection criteria inputs (TerCodeA and TerCodeB).

Each column in your table that you want to bring in must be assigned to table variable, linked variable or variable selection criteria. If you do not have a table variable, linked variable or a variable selection criteria, the data will not be brought into the table.

Importing a File:

In this example, a table variable with three selection criteria will be created.

1. Navigate to the **Edit Variable** tab for the table variable from where you want to import a table. Make sure you have any linked variables and selection criteria already entered. **SAVE** your entry prior to importing.

2. Click **IMPORT DATA** on the navigation bar to open the Import Data File screen.

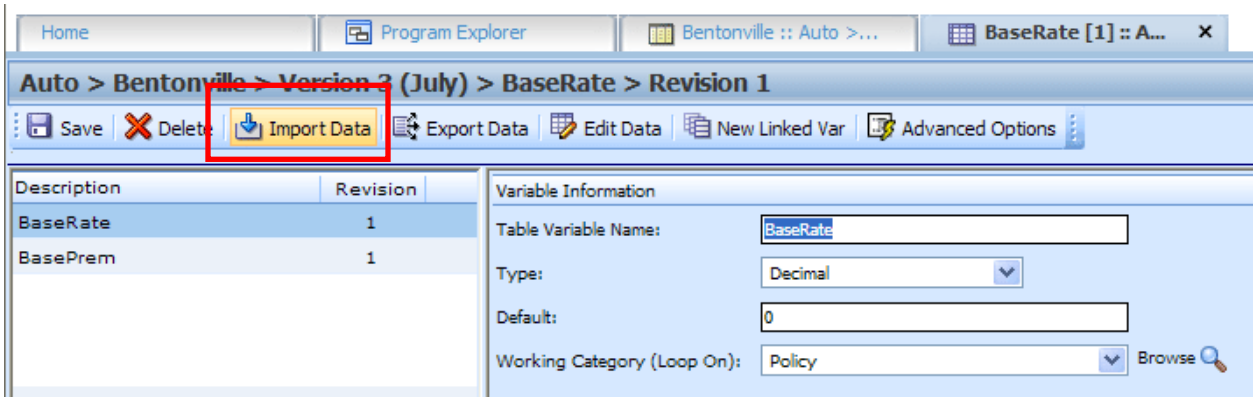


Figure 93 Selecting Data File

3. If you know the name and location of the file, you can type it into the text box. Otherwise click **BROWSE…** to locate your file. Once the data file has been selected, click **IMPORT**.

   The file will be uploaded.

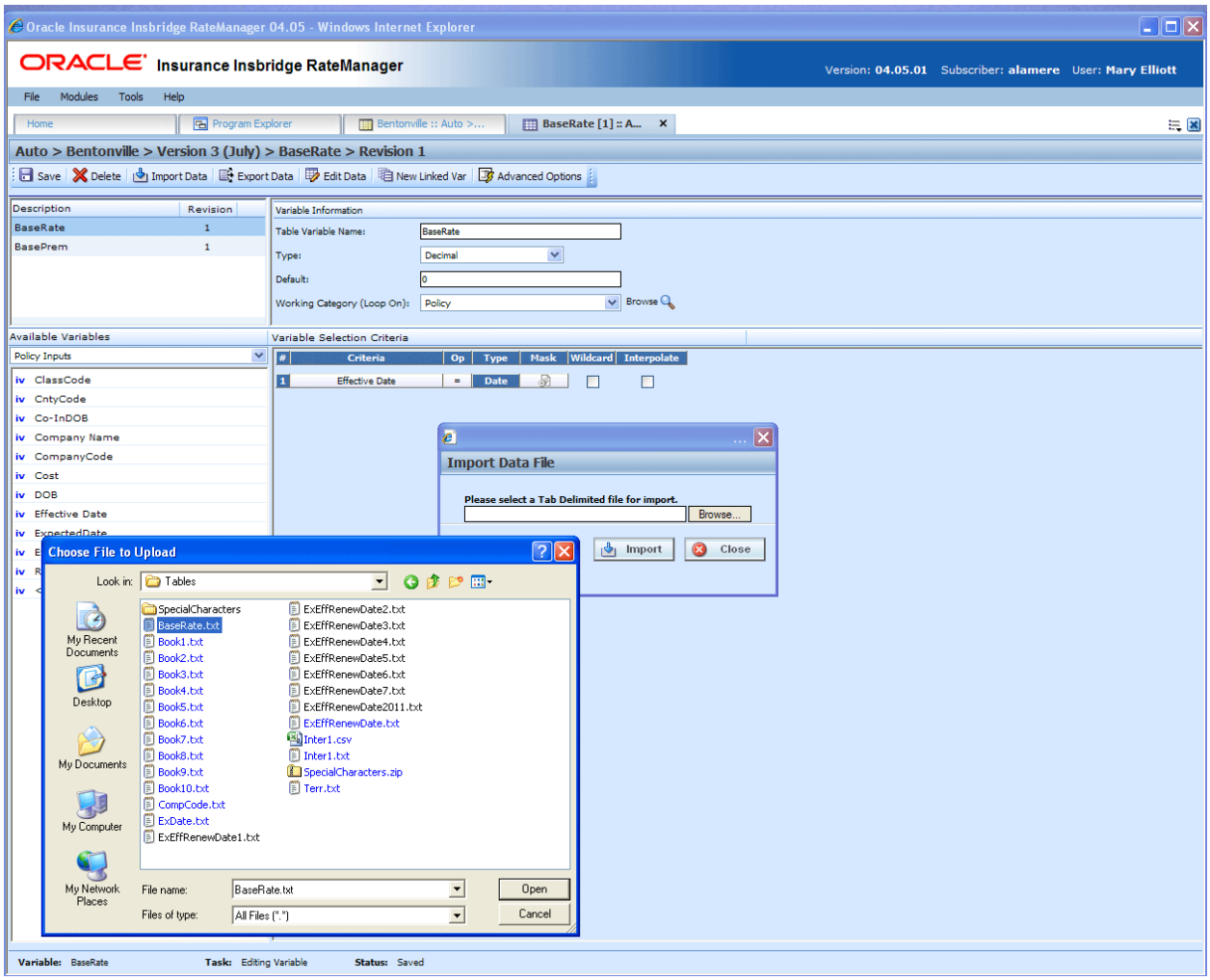


Figure 94 Importing a Table Variable

4. You will be asked if you would like to preview your data.

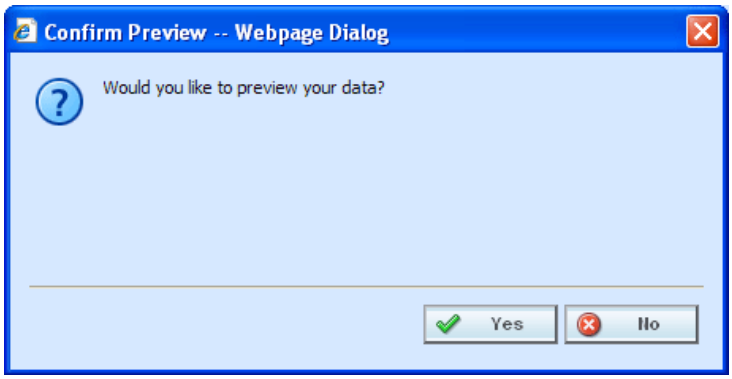


Figure 95 Confirming Preview of Data

5. Clicking **Yes** will allow you to see your import file. This view allows you to match the column headings to your variable(s) and variable criteria.

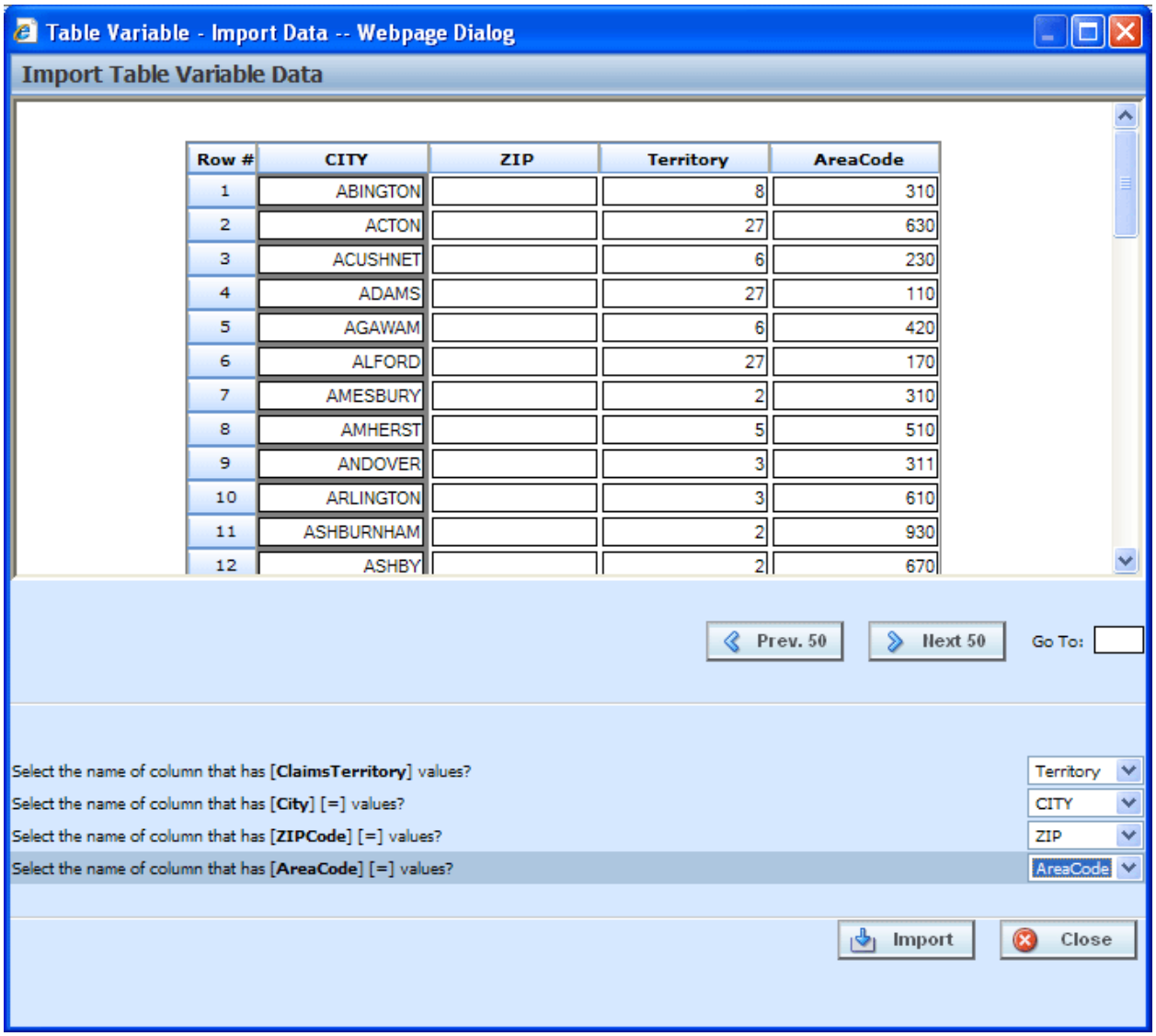


Figure 96 Previewing Data File

The import popup screen is split into two parts. The top portion displays the import file as you created it. The bottom half lists the criteria and variable(s) you created within RateManager with a drop down box where you can match up each element with the correct column in the import file.

If the table contains multiple rows, you can use **NEXT 50** and **PREVIOUS 50** to navigate through the table. You also can go directly to a row by entering the row number in the **GO TO box** and clicking anywhere outside the box.

NOTE: *Asterisks"*"* *in the import file are stripped out during the import process in RateManager, so you will not see them in the edit data box. Likewise, if you manually enter your data into the edit data box, there is no need to put an "*" in the wildcard field. Simply leave the field blank.*

6. Clicking **No** allows you to match the column headings to your variable(s) and variable criteria without viewing the import file. This saves time when trying to import a large table.

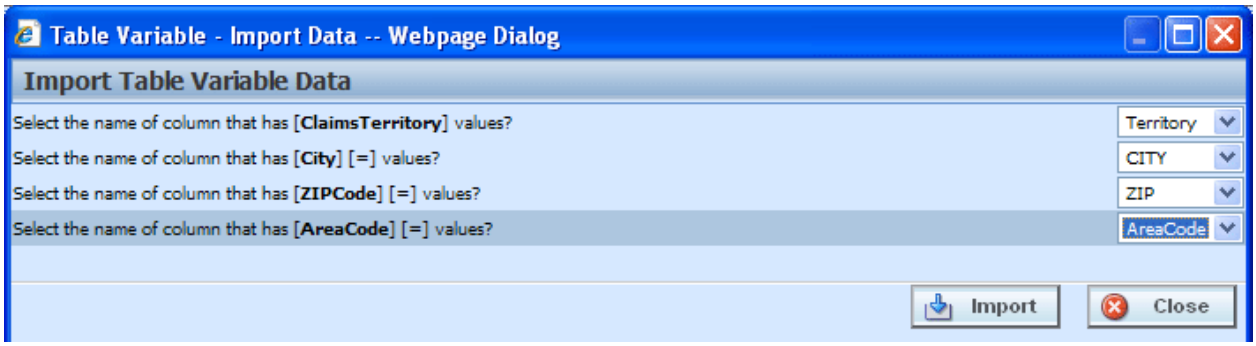


Figure 97 Not Previewing Data File

7. Select the drop down next to a variable or criteria to choose the column from the import file that contains data for that item. When you are finished matching columns, select **IMPORT**.

   If you do not have a match for a column you need, click **CLOSE** to close the import process without bringing in any data.

   If you want to add or remove a column, you will need to re-import the data.

8. If the table variable already contains data, you will be asked if you would like to delete the data first.

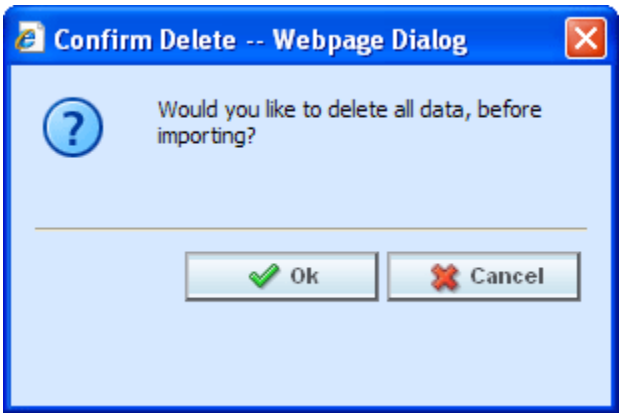


Figure 98 Confirming Delete All Data

9. Select **Ok** to have existing data in the table variable deleted before the new data is imported. Select **Cancel** to leave the existing data in the table variable and have the new data added at the end of the table.

10. When finished, a confirmation box will display, telling you how many rows were imported.

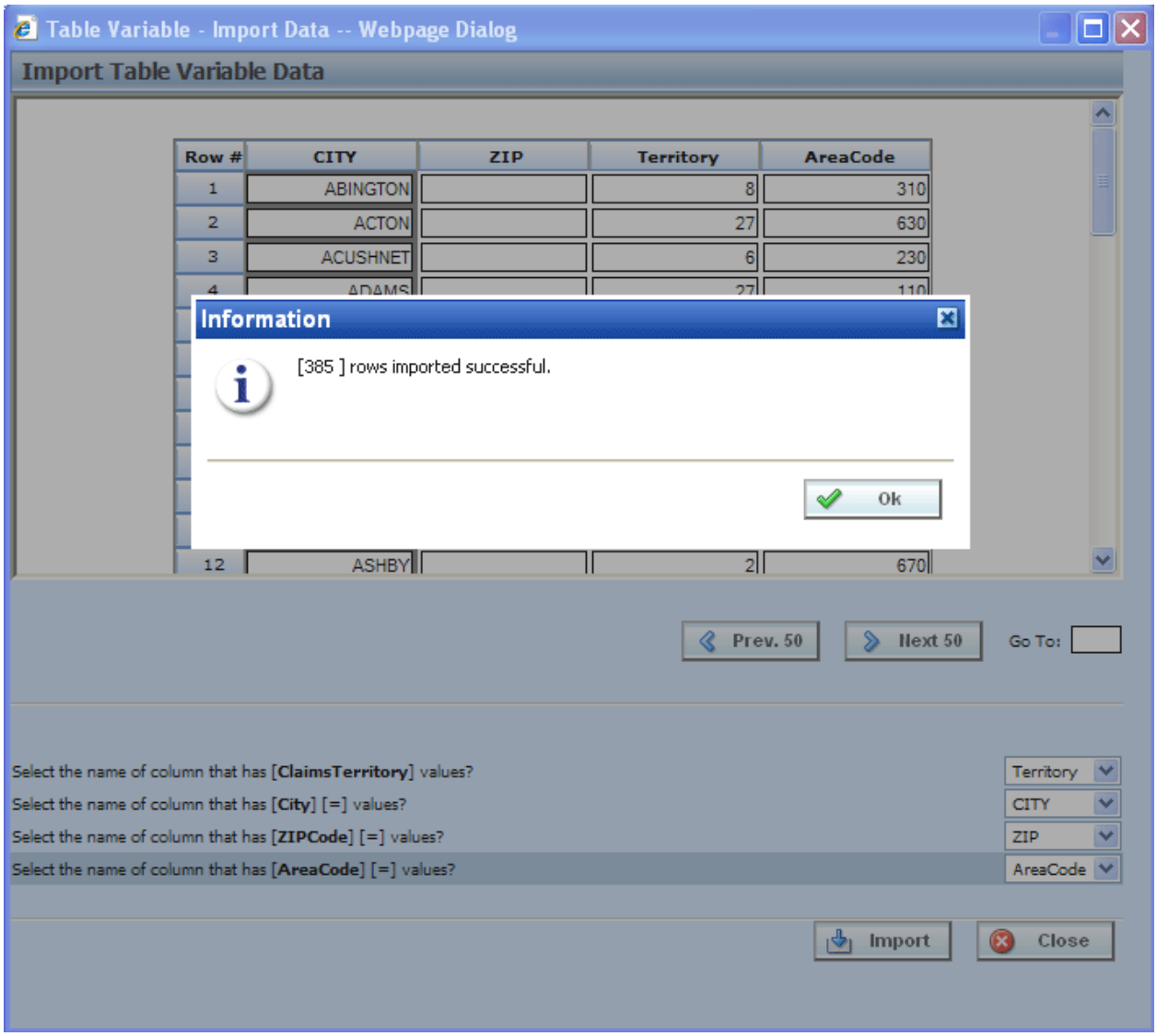


Figure 99 Successful Import Message

Using a Date Mask

If enabled, a date mask (format) for 'Date' data types will be displayed. This date mask will allow to you define the format of the date you are importing. The date mask identifies the format that the date is currently in before it is imported. When the data is imported in, it will be converted to the format defined at the program level.

Date masks can be set at the line of business level and at the program level. At the line of business level, the date mask will apply to all programs in that line of business. At the program level, the date mask will apply to all versions of the program. A program level date mask will override a line of business date mask. Wherever the date format is defined, either at the line of business or program level, is the format that will be used when rating.

Importing Date Data

1. When you are ready to import your table, click **IMPORT DATA** on the navigation bar to open the Import Data File screen.

2. When you are asked if you would like to preview your data, click **Yes** to see your data or **NO** if you do not want to see your data. Selecting NO is helpful if there is a large amount of data.

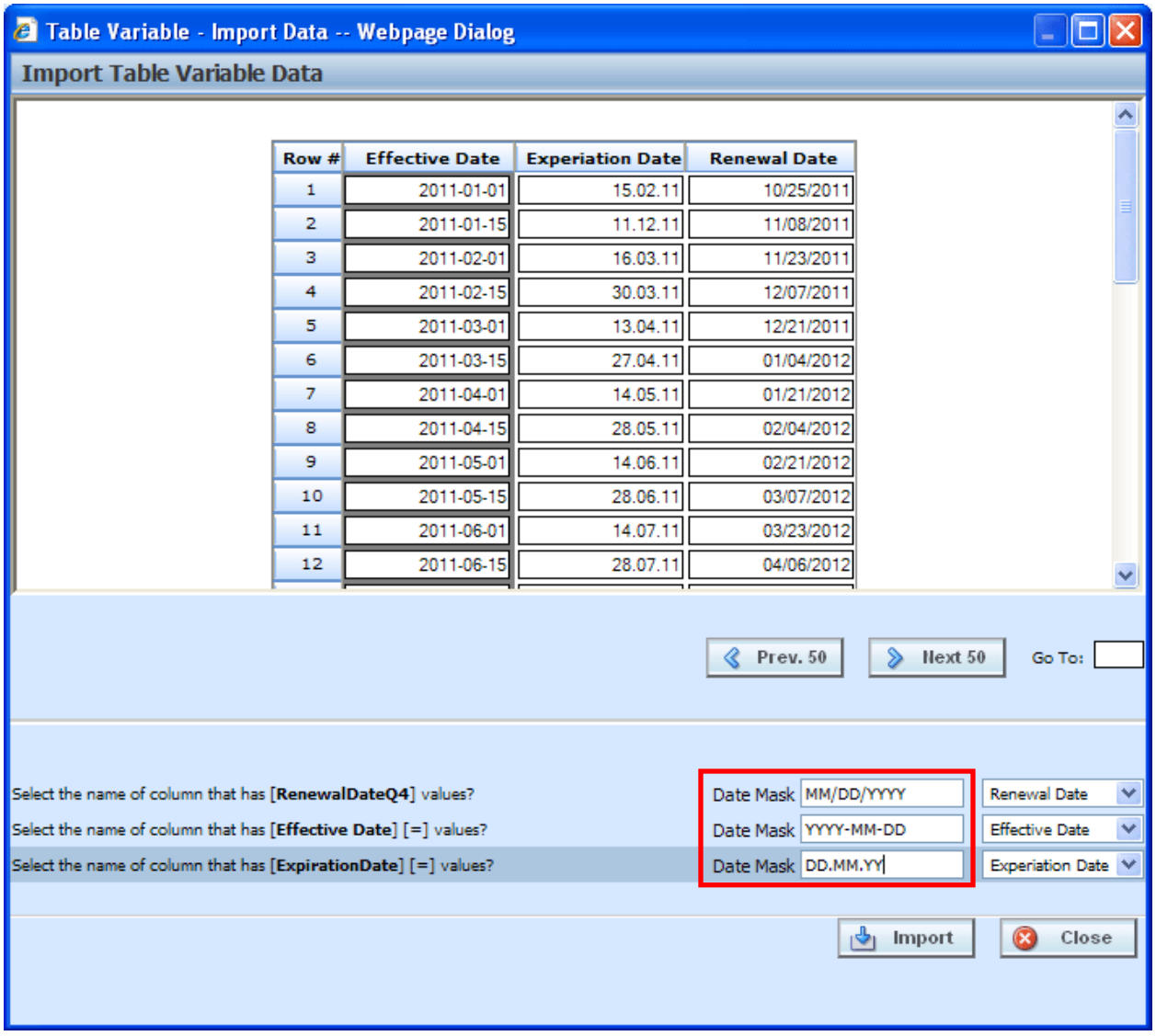


Figure 100 Previewing Data File with a Date Mask

3. Match the variables and criteria on the left side to the corresponding column headings on the right side.

4. Enter the date mask (format) of the data you are importing.

5. When you are finished, select **IMPORT**.

6. If the table variable already contains data, you will be asked if you would like to delete the data

first. Select **Ok** to have existing data in the table variable deleted before the new data is imported. Select **Cancel** to leave the existing data in the table variable and have the new data added at the end of the table.

7. When finished, a confirmation box will display, telling you how many rows were imported. If there is an error, please correct the error and try again.

Editing Imported Table Data

When you enter the table in RateManager you will see the date format that the program has.

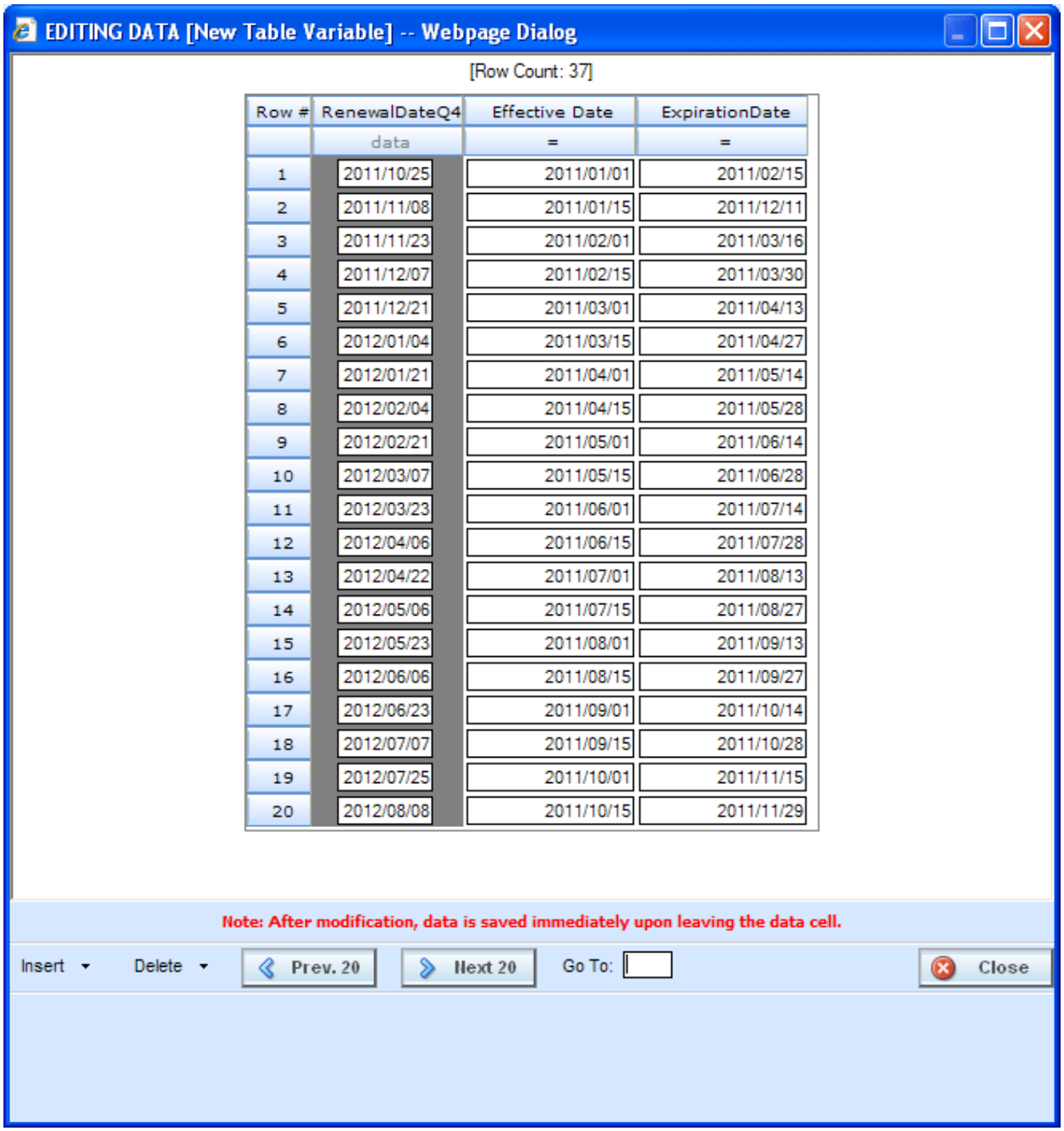


Figure 101 Imported Table Data

The date format that you imported will be changed to the date format that is on the program.

Notes on Date Masks

- The date mask will apply only to the data you are importing.
- Date formats must match exactly, including the separators being used.
- Day and month formats must be two digits. For example January 7 must have a zero proceeding the month (01) and proceeding the day (07).
- Months must be represented in numeric form. 1-Jan-2012 will not be imported. 01-01-2012 would be imported.
- If you edit a row or enter additional rows, the date mask will not apply. Any edits or additions completed within RateManager should be in the proper format. If you have extensive updates or additions, it is recommended that you edit the table outside of RateManager and re-import.
- If a date mask field is present, you must make an entry.
- If the system administrators have not enabled this feature, this field will not be visible.

EXPORT DATA

Exporting a table places all the data from a table variables data table into a tab-delimited text file. You can then make changes to the file and import the data into the same variable or a different variable.

To Export a Table

1. Navigate to the **Edit Variable** tab for the table variable from where you want to export data. You also can export the data on the Program Details tab by right clicking the table variable and selecting **Export Data (Tab-Delimited)** from the popup menu.
2. Click Export Data. A File Download popup will be displayed. You will be prompted by your browser to confirm downloading the file.

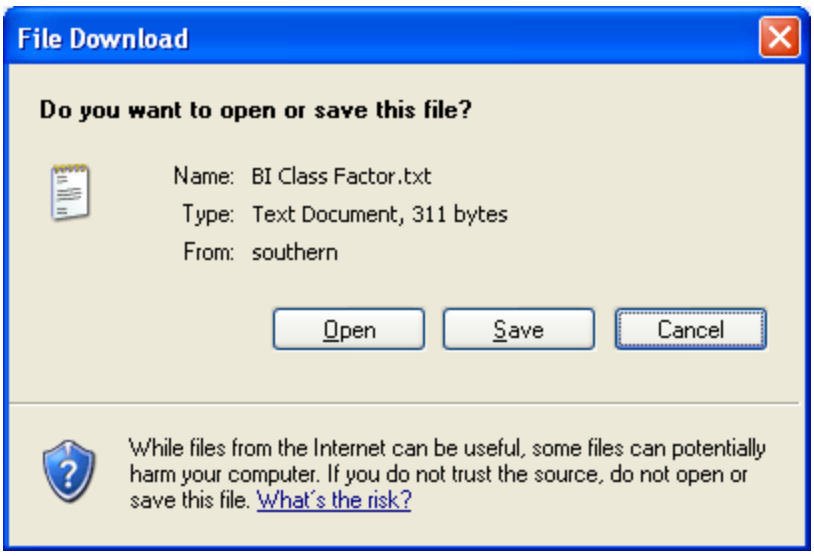


Figure 102 Exporting a Table

3. Click **Save** to save the file to your local or network hard drive or **Open** to open the file with your default text editor.

4. If you chose to save the file, you will be asked to choose a location to save the file to.

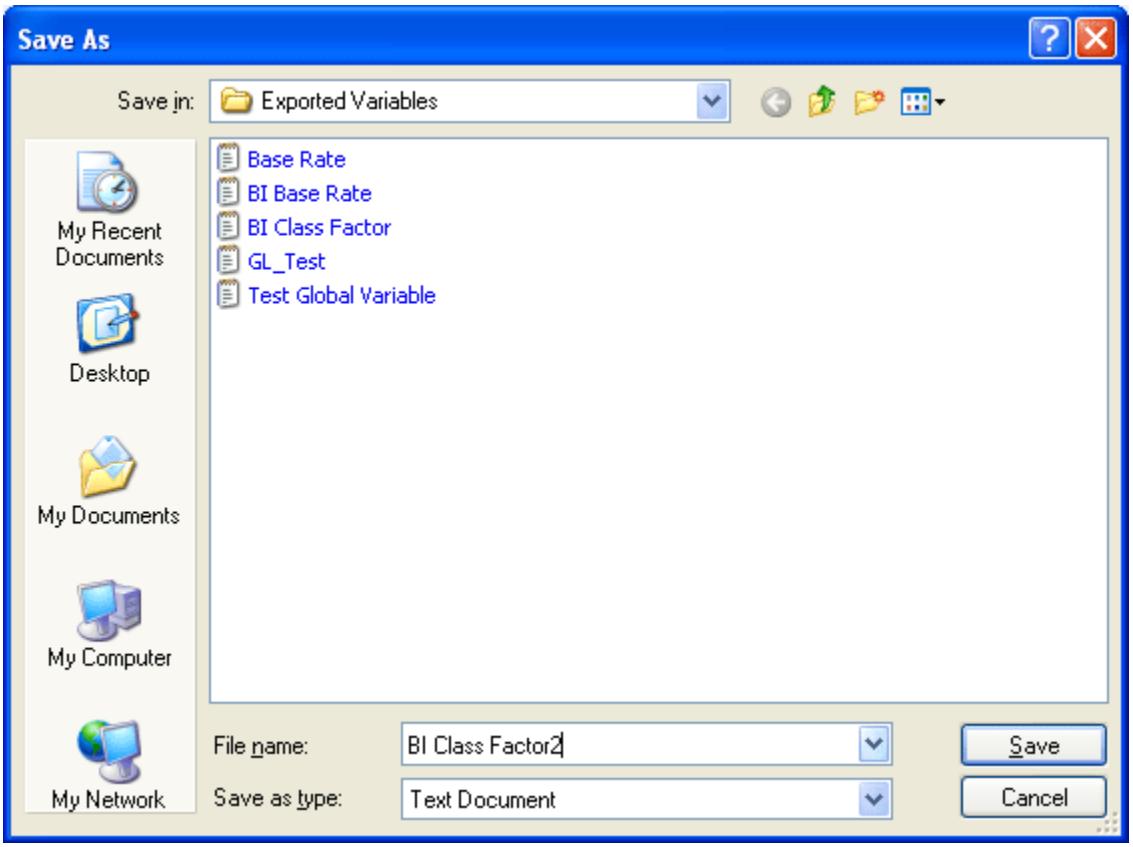


Figure 103 Saving a Table

5. Select the folder where you want to save the file and enter in a name for the file. By default, the

file will be saved as the variable name. Click **Save**, the file will be saved to the location you specified. When the file has finished downloading, you will have the option to:

a. **OPEN:** this opens the file in your default text editor.
b. **OPEN FOLDER**: this will open your computers explorer.
c. **CLOSE**: this will close the dialogue box.

You can now edit the file with the text editor of your choice.

Exported Data and Unicode

RateManger allows for Unicode characters to be imported and exported from tables. Exported tables that have Unicode characters in it may not display properly in some editing applications.

Using Oracle Open Office (Recommended)

Exporting and modifying RateManager table data in Oracle's Open Office Release 3.3 Calc application. When opening a text file, this application allows you to select the File Origin (encoding). If you select UTF-8, the file will display properly.

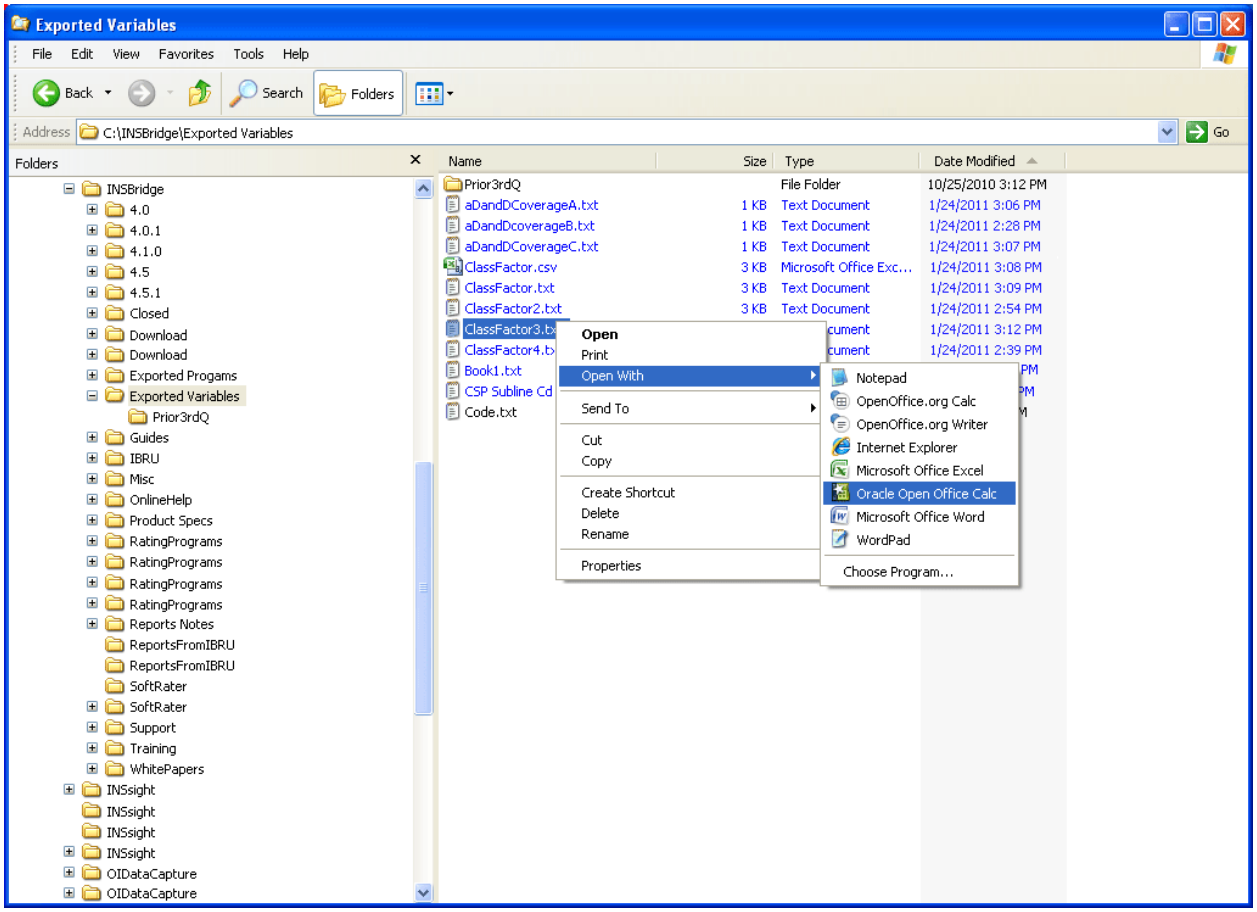


Figure 104 Using Oracle Open Office for Editing Table Data

1. In RateManager, export your table variable. This will create a tab delimited, .txt, file.

2. Right click the .txt file and choose to Open With Oracle Open Office Calc.

3. Oracle Open Office Calc will present a screen with Import options. The options you select will persist so you will only have to do this one time.

4. Select your Import Settings:

    a. The Import Character set needs to be Unicode, UTF-8.
    b. Separated by option should be Tab.
    c. Text delimiter should be blank. Delete the value in the drop-down.

5. Open the file.

When you open your file, the data will be displayed as expected.

Oracle Open Office Calc is available at OpenOffice.org.

Using Other Editing Applications

If you attempt to open an exported text file, .txt, with another editing application, such as Microsoft Excel, and the Unicode characters are not present, you may have to open the editing application first and then choose Open (file). This method will prompt you to select the File Origin (encoding). If you select UTF-8, the data will be displayed properly.

You can open the exported text file using a text editor such as Notepad and the do a Save or a Save As (save with Encoding of UTF-8). Next open your editing application and open the text file. The values should be correctly displayed.

EDIT DATA

Edit data in a table when you want to add, delete or change the value for a row. For variables that are locked or grayed out, such as template generated variables, you will be able to view the data in the data preview area of the Program Details tab but not make any changes. If you need to make changes to a locked variable, you will have to create a new revision. The new revision will be open for editing.

If you need to make a lot of changes to the table, you may want to Export the table, edit it, and then re-import the table.

To Edit Data in a Table

1. Navigate to the **Edit Variable** tab for the table variable from where you want to edit the data.

2. This will open the **Edit Data** screen. This screen displays the table data and lists the row count at the top of the screen.

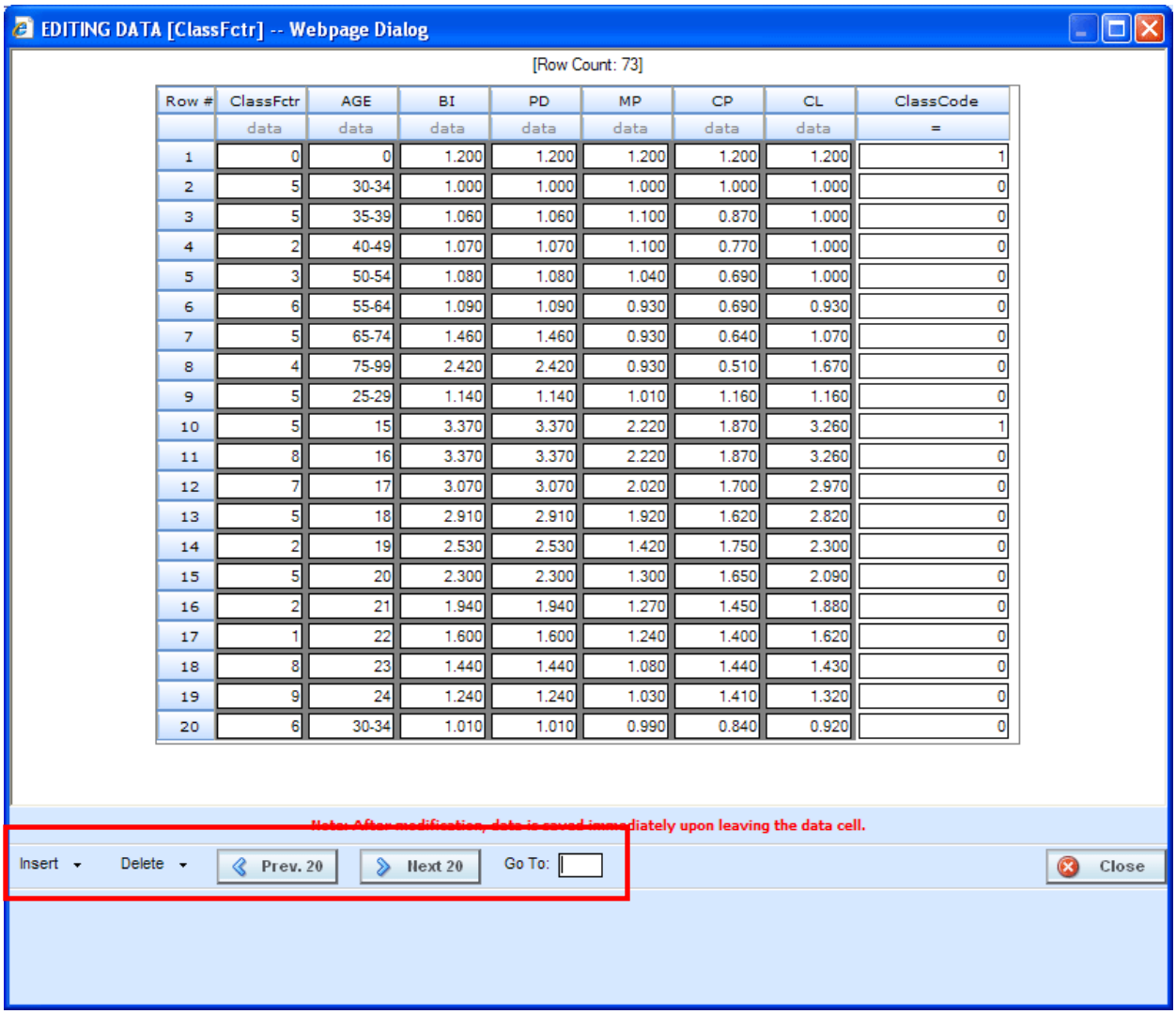


Figure 105 Editing Table Data

NOTE: *If you are on the **Edit Variable** tab and you have changed the criteria information or added/deleted linked variables, remember to save your variable before editing the data.*

3. If the table contains more than twenty rows, you can use the **PREV.20** and the **NEXT 20** buttons to navigate through the table. You also can go directly to a row by entering the row number in the **GO TO box** and clicking anywhere outside the box.

4. To edit a cell, first select it by either tabbing to it or using your mouse to select it and then entering the new data.

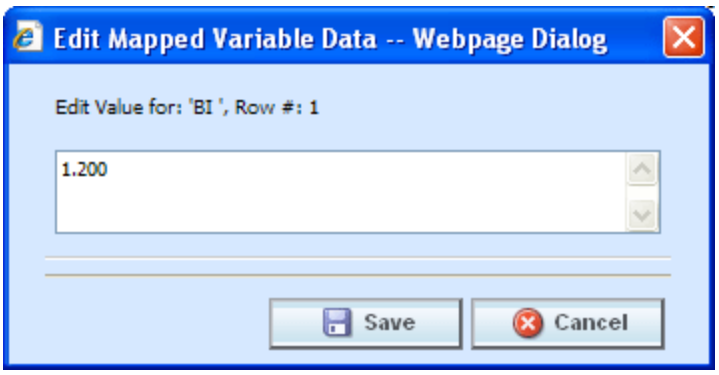


Figure 106 Edit Mapped Variable Data

NOTE: *When you make a change to a cell in the data table, it is immediately updated in the database. Therefore, you cannot undo changes to the data table by clicking **CANCEL** on the Edit Data screen. You must re-enter the data if you inadvertently change a value.*

5. To insert a new row into the table, select a cell in the table where you want the new row to be inserted. Click **Insert** and then select either **Above Row** or **Below Row** to insert the new row either above or below the current row. If no cell is selected, the new row will be added to the end of the table.

6. To delete a row from the table, select a cell in the row you want to delete. Click **Delete** and then select **Current Row**. You will not be prompted for confirmation before deleting a single row.

7. To delete all rows from the table, click **Delete** and then select **All Rows**. You will be asked to confirm deleting all rows.

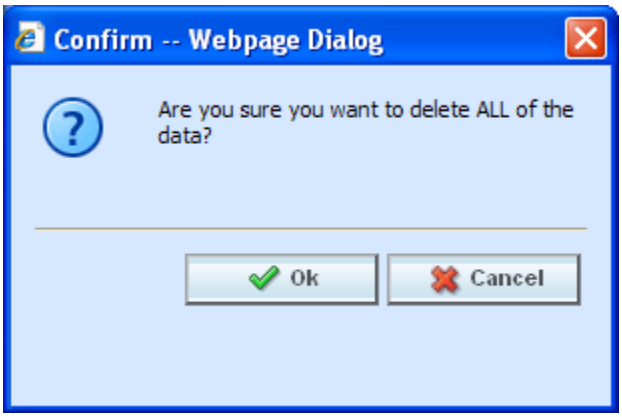


Figure 107 Confirming All Rows Delete

8. Select **Ok** to delete all rows and return to the Edit Data screen or **Cancel** to return to the Edit Data screen.

9. When you are finished editing the data, click **Close** to return the **Edit Variable** tab. If you changed any of the data, the time stamp on the **Program Details** tab will be updated.

Creating a Table without Importing Data

If you do not import a table, you can create one using the Edit Data screen. After you have created your table variable, click Edit Data to open the Edit Data screen. There will be columns for the table variable(s) you are creating and the criteria you have selected. Click **Insert** and then select either **Above Row** or **Below Row** to insert the first row. Enter any data and continue adding rows until you are finished. When you have finished entering your data, click **Close** to return the **Edit Variable** tab.

WORKING WITH STEPS

Steps are used use in algorithms, calculated variables, driver assignment algorithms or driver assignment scenarios. The following step types are available for every element:

- Category Items:
  - Get Category Item
  - Set Category Item
  - Get Ranked Category Item
  - Set Ranked Category Item
- Count Across
- DataType Functions:
  - IsNumeric
  - IsAlpha
  - IsDate
- Date Functions:
  - Date Addition
  - Date Difference
- If Statement
- Mask
- Math Functions:
  - Arithmetic
  - Absolute Value
  - Power
  - Log
  - Log10
  - Exp
  - Rand
  - Fact
  - Sqrt
  - Ceiling
  - Floor
  - Even
  - Odd
- Trig Functions:
  - Cos
  - Cosh
  - Acos
  - Acosh
  - Sin
  - Sinh
  - Asin
  - Asinh
  - Tan
  - Tanh
  - Atan
  - Atanh
  - Degrees
  - Radians
- Ranking:
  - Clear Ranking

    - Rank Across Category
- String Functions:
    - Get Length
    - Set Message
    - String Addition
- Sum Across

The following step types are available only for use in underwriting algorithms:

- Set Underwriting to Fail

The following step types are available only for use in driver assignment scenarios:

- Set Principal Operator Variable
- Re-calculate Vehicle Usage: Using

The following step types are available only for use in ISO ERC template programs:

- Query
    - Data source

For all elements that use steps, you can set the next step to be executed, reorder steps, edit and delete steps.

NOTE: *In the information in this chapter the word algorithm is used as a generalization. The information applies to all algorithms, calculated variables, driver assignment algorithms and driver assignment scenarios.*

ENTERING IN A NEW STEP

New steps can be entered for any unlocked calculated variable, algorithm or driver assignment in a standard program. In a template generated program, any calculated variable, algorithm or driver assignment that is open for editing can have steps added. Whether you are editing an existing program or creating a new one, using a global element of a local one, the process is the same.

For Example

In this example, we will add a step to an already existing calculated variable.

1. Navigate to Program Details Tab for the program that contains the variable where you want to add a step. Select Calculated Variable from the Program Details Folders. The Folder Details area will be populated with the calculated variables for the program.

2. Either double click the variable or select it and right click. Select **Edit** from the menu. This will open the **Edit Variable Tab**. If you are working on an algorithm or driver assignment you will navigate to the appropriate edit tab.

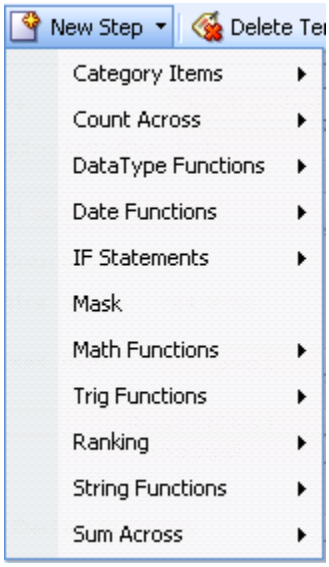


Figure 108 Entering a New Step

3. To add a new step, click **NEW STEP** in the top bar menu and select the type of step you want to add from the menu.

4. The new step type will be added in the variable details area. Depending upon the step type, you will have to select the appropriate variables, constants, inputs or for algorithms and drivers assignments, callouts and functions. The value you need to select will be listed on the step. For example, if the step has an “Enter Variable” box, you must choose the variable type from the Available Variable, Functions and Constants area on the right hand side of the screen. The options will be populated underneath. Click the “Enter Variable” box and then double click the corresponding variable you want. The box will refresh with your selected value.

5. Continue entering steps until complete. When you are finished making your entries, click **Save**.

Setting the Next Step

For all steps, you have the ability to set the next step to be executed. This is done by clicking the numbered step box next to **Next Step** and selecting the appropriate step from the popup menu.

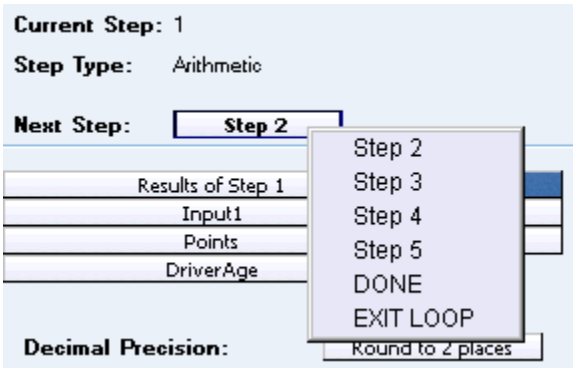


Figure 109 Setting the Next Step

Selecting one of the steps (e.g. **Step 3**) will set it as the next step. Selecting **DONE** will exit the algorithm after the step is finished. Selecting **EXIT LOOP** will exit the algorithm after the step is finished and prevent any further iterations of the algorithm from executing.

For IF statements, there are two **Next Step** boxes, labeled as **THEN** and **ELSE**. THEN is used to set the next step to execute if the statement evaluates to TRUE and ELSE is used to set the next step to execute if the statement evaluates to FALSE.

NOTE: *For callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made.*

Adding a New Element

To add a new element, a variable, input, result or constant, to the step, find the item you would like to add from the listing of **Available Variables, Functions and Constants.** Once you have located the correct item, double-click it to add it as the next operand.

You also can replace an existing operand by clicking it once and then double clicking the item you would like to replace it with. This applies to the results of the arithmetic step too.

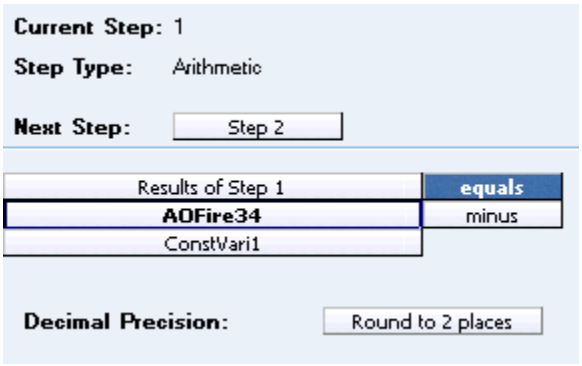


Figure 110 Setting an Arithmetic Step 1

Arithmetic Operators

Arithmetic operators are used in arithmetic steps. The available arithmetic operators are:

+	Plus - Performs a basic addition operation. i.e. 2 + 3 = 5.
-	Minus - Performs a basic subtraction operation, i.e. 5 - 3 = 2.
x	Multiply By - Performs a basic multiplication operation, i.e. 2 x 3 = 6.
/	Divide By - Performs a basic division operation, i.e. 6 / 3 = 2.
|	Bitwise OR - Performs a bitwise OR operation, i.e. 5 | 12 = 13.

Bitwise OR is determined by converting each number to binary form and then performing an OR, bit by bit, as shown below.

5 in binary is:	00000101
12 in binary is:	00001100
So the result is:	00001101 or 13.

Any column that has a 1 in either row has a 1 in the result row.

&	Bitwise AND - Performs a bitwise AND operation, i.e. 5 & 12 = 4.

Bitwise AND is determined by converting each numbers to binary form and then performing an AND, bit by bit, as shown below.

5 in binary is:	00000101
12 in binary is:	00001100
So the result is:	00000100 or 4.

Any column that has a 1 in each row will have a 1 in the result row.

Comparison Operators

Comparison operators are used in IF steps. The available comparison operators are:

=	Equals
<>	Not Equals
<	Less Than
<=	Less Than Or Equal To
>	Greater Than
>=	Greater Than Or Equal To

Figure 111 Comparison Operators Table

As arithmetic comparisons only can be performed on numbers (integers and decimals), RateManager will limit your options for comparing strings to only those of Equals and Not Equals. An operator may be used to specify a range of numbers by setting the first criteria as Greater Than and the second criteria as Less Than, or to specify an exact match by setting the operator to Equal.

Decimal Precision

At the end of each arithmetic step, the user can set the rounding parameters.

- **Round**: Rounds the number using standard rounding rules. Rounding can be set anywhere between 0 and 9 digits.
- **Truncate**: All or a portion of the decimal will be dropped. Can be set between 0 and 9 digits.
- **Round Up**: Will round the number, or a portion of it, to the next higher number. Can be set between 0 and 9 digits.
- **No Round**: No rounding will occur on the step.

Setting Rounding

To set the rounding to be used at the end of the step, click the box next to **Decimal Precision** and select the appropriate rounding from the popup menu. Rounding can be to 9 decimal places.

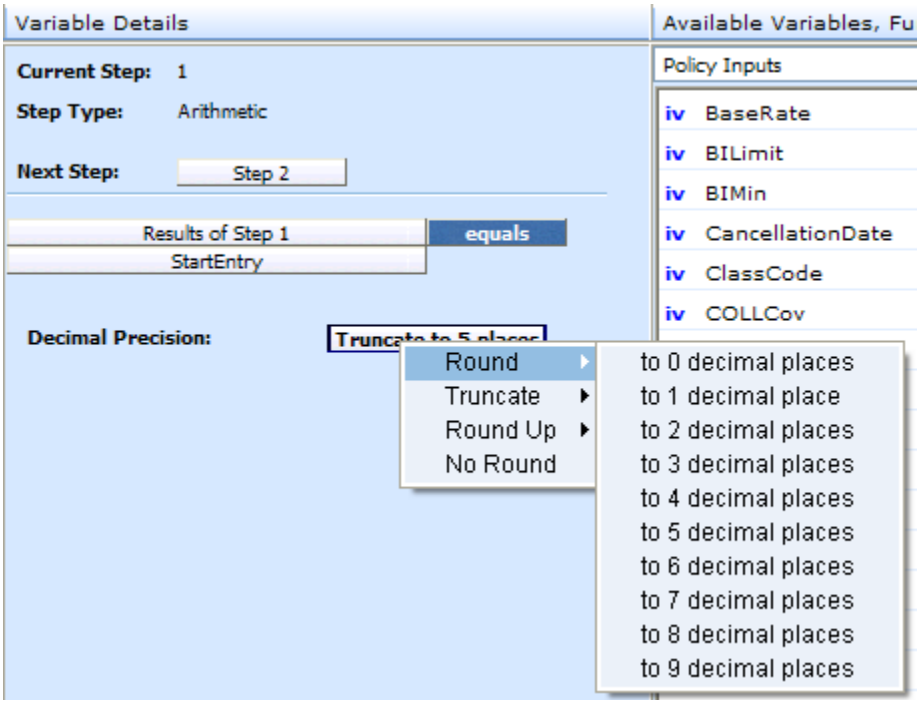


Figure 112 Setting the Rounding Option

Adding Arithmetic Operators

To set the arithmetic operator to be used, click the box next to the item name and select the appropriate operator from the popup menu.

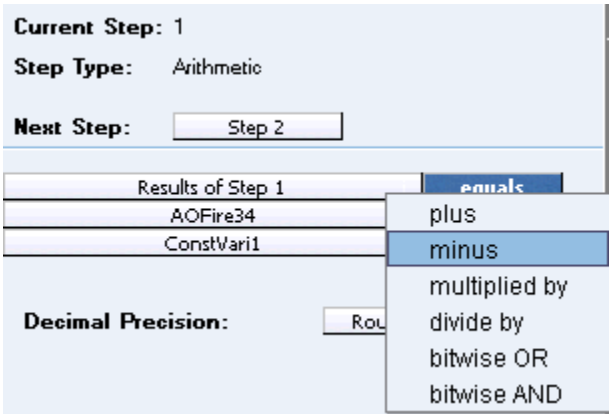


Figure 113 Setting an Arithmetic Step 2

Moving Steps

You can move a step at any time to any position. Steps can be moved one at a time. There are two ways to move steps.

Drop and Drag

Drop and drag allow you to highlight the step you want to move and drag it to the location you want.

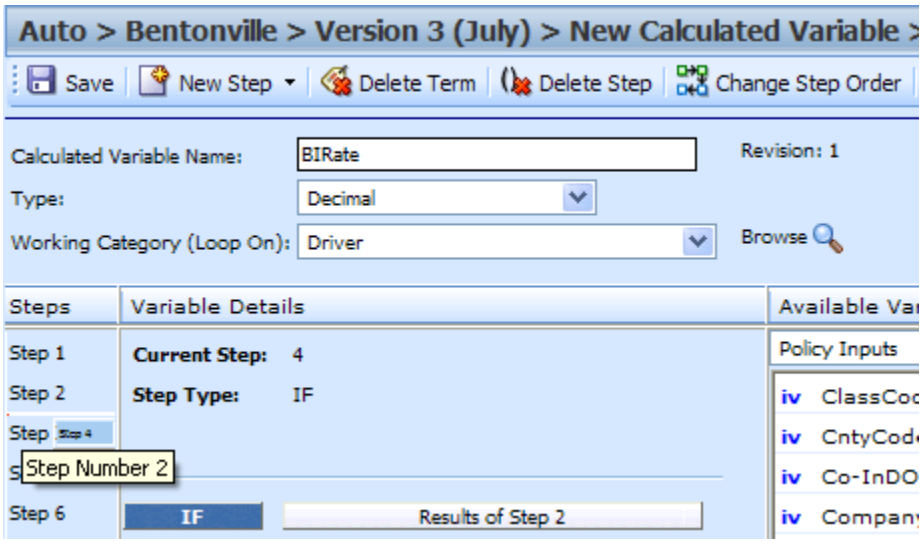


Figure 114 Moving Steps

1. Highlight the step you want to move in the **Steps** column.

2. Drag it to a new location in the list and drop it.

Using the Change Step Order Button

The Change Step Order button may be easier to use if you have a lot of steps. It allows you to select the exact location you want from a list of steps.

Figure 115 Change Step Order

1. To use the Change Step Order button, highlight the step you want to move in the **Steps** column.
2. Click the **Change Step Order** button. A popup window will be displayed.
3. Select the new position where you want the step.
4. Click **Ok**. The popup will close and the step will be in the new location.

Deleting Steps

Steps can be deleted at any time. You cannot delete the last step from a calculated variable.

1. To delete a step, select the step in the **Steps** column.
2. Click **Delete Step** in the top bar menu.
3. You will be asked to confirm your deletion. Select **Yes** to delete and **No** to return to the tab.

Category Items

Category Items are used to get or set a specific instance of a variable. There are six Get/Set Category Items:

- Get Category Item (Use Current Path)
- Set Category Item (Use Current Path)
- Get Category Item (All Available)
- Set Category Item (All Available)
- Get Ranked Category Item
- Set Ranked Category Item

Get Category Item Step

A get category item step is used to get a specific instance of a variable. For example, a get category item step could be used to get the first endorsement for each vehicle on an auto policy.

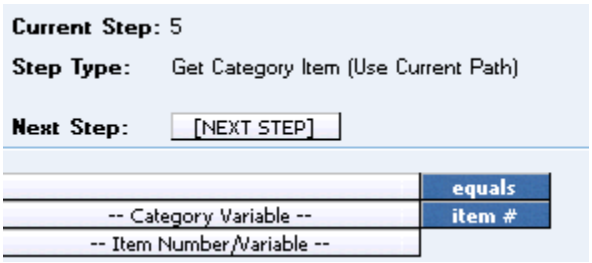


Figure 116 Get Category Step

There are two types of the get category item step.

- **Get Category Item (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2006
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2006
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>

Driver #2
<Violation>
Violation Type: At fault accident
Violation Date: 09/19/2008
Violation Points: 5
</Violation>
</Driver>

<Driver>
Driver #3
<Violation>
Violation Type: Failure to signal
Violation Date: 12/02/2009
Violation Points: 1
</Violation>
<Violation>
Violation Type: Speeding
Violation Date: 01/21/2008
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2008
Violation Points: 2
</Violation>
</Driver>

If a **Get Category Item (Use Current Path)** step, used at the Driver level, is used to get the 2nd violation for each driver.

Driver Second Violation Type [=] Violation Type [Item #] 2

The Driver Second Violation Type would equal "Driving without a license" for Driver #1. For Driver #2, Driver Second Violation Type would be blank, because Driver #2 does not have a second violation. For Driver #3, Driver Second Violation Type would equal "Speeding".

- **Get Category Item (All Available):** Items in a subcategory of the current category are looked at as a whole.

Example

Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

<Driver>
Driver #1
<Violation>
Violation Type: Speeding
Violation Date: 01/04/2009
Violation Points: 2
</Violation>
<Violation>
Violation Type: Driving without a license
Violation Date: 05/30/2009
Violation Points: 1
</Violation>

</Driver>

<Driver>
Driver #2
<Violation>
Violation Type: At fault accident
Violation Date: 09/19/2010
Violation Points: 5
</Violation>
</Driver>

<Driver>
Driver #3
<Violation>
Violation Type: Failure to signal
Violation Date: 12/02/2009
Violation Points: 1
</Violation>
<Violation>
Violation Type: Speeding
Violation Date: 01/21/2008
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2008
Violation Points: 2
</Violation>
</Driver>

If a **Get Category Item (All Available)** step, used at the Policy level, is used to get the 4th violation on the policy.

Policy Fourth Violation Type [=] Violation Type [Item #] 4

The Policy Fourth Violation Type would equal "Failure to signal", because that is the fourth violation on the policy.

Set Category Item Step

A set category item step is used to set a specific instance of a variable. For example, a set category item step could be used to set the first accident type for each driver on an auto policy.

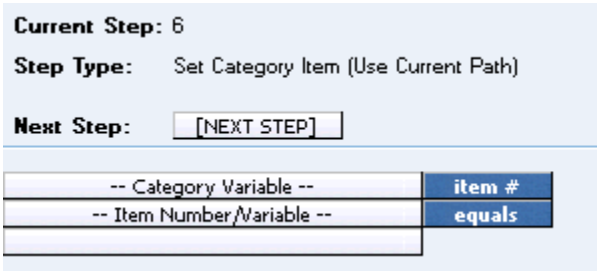


Figure 117 Set Category Item Step

RateManager provides two types of the set category item step.

- **Set Category Item (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2009
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2010
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/2008
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal
  Violation Date: 12/02/2009
  Violation Points: 1
  </Violation>
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/21/2010
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Running a stop sign
  Violation Date: 11/14/2011
  Violation Points: 2
  </Violation>
  </Driver>

  If a **Set Category Item (Use Current Path)** step, used at the Driver level, is used to set the points for the 1st violation for each driver.

  Violation Points [Item #] 1 [=] 5

The Violation Points would equal 5 for each driver's 1st violation.

- **Set Category Item (All Available):** Items in a subcategory of the current category are looked at as a whole.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2009
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2010
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/2008
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal
  Violation Date: 12/02/2009
  Violation Points: 1
  </Violation>
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/21/2010
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Running a stop sign
  Violation Date: 11/14/2011
  Violation Points: 2
  </Violation>
  </Driver>

  If a **Set Category Item (All Available)** step, used at the Policy level, is used to set the points for the 4th violation on the policy.

  Violation Points [Item #] 4 [=] 5

The Violation Points would equal 5 for Driver #3's 1st violation, because it is the 4th violation on the policy.

Get Ranked Category Item Step

A get ranked category item step is used to get a specific instance of a variable after the variable has been ranked. For example, if driver accidents have been ranked by accident date, high to low, then a get ranked category item step could be used to get the accident date of the most recent accident for each driver.

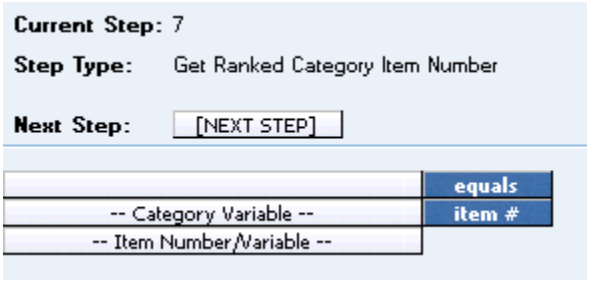


Figure 118 Get Ranked Category

Set Ranked Category Item Step

A set ranked category item step is used to set a specific instance of a variable after the variable has been ranked. For example, if driver accidents have been ranked by claim points, high to low, then a set ranked category item step could be used to set the points for each driver's highest ranked accident to a certain number.

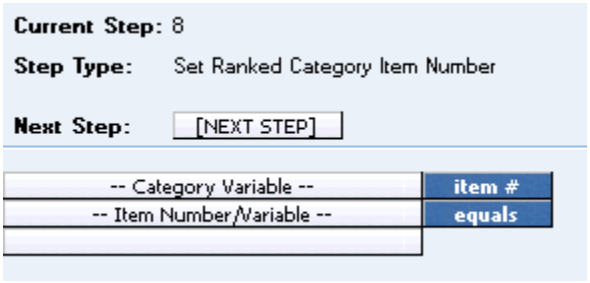


Figure 119 Setting Ranked Category Item

Count across Category Step

A count across category step is used to determine how many instances of a specific item exist. For example, if you wanted to know how many dwellings were on a policy, you could use a count across step to count the total number of instances of a specific dwelling element (input, variable, result).

There are two available in RateManager:

- Count Across Category (All Available)
- Count Across Category (Use Current Path)

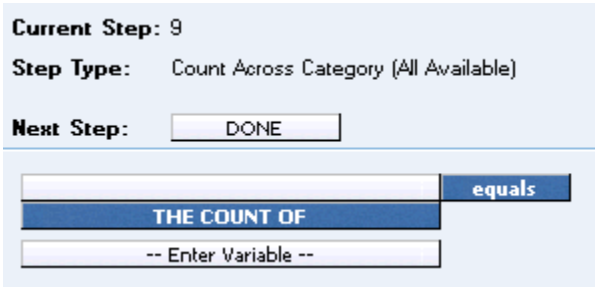


Figure 120 Count Across Category Step

- **Count across Category (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2009
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2010
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/2008
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal
  Violation Date: 12/02/2009
  Violation Points: 1
  </Violation>
  <Violation>
  Violation Type: Speeding

Violation Date: 01/21/2010
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2011
Violation Points: 2
</Violation>
</Driver>

If a **Count Across Category (Use Current Path)** step, used at the Driver level, is used to determine the number of violations for each driver.

Total Driver Violations [=] The Count (Using Current Path) of Violation Type

The Total Driver Violations would equal 2 for Driver #1, 1 for Driver #2 and 3 for Driver #3.

- **Count Across Category (All Available):** Items in a subcategory of the current category are looked at as a whole.

Example

Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

<Driver>
Driver #1
<Violation>
Violation Type: Speeding
Violation Date: 01/04/2009
Violation Points: 2
</Violation>
<Violation>
Violation Type: Driving without a license
Violation Date: 05/30/2010
Violation Points: 1
</Violation>
</Driver>

<Driver>
Driver #2
<Violation>
Violation Type: At fault accident
Violation Date: 09/19/2008
Violation Points: 5
</Violation>
</Driver>

<Driver>
Driver #3
<Violation>
Violation Type: Failure to signal
Violation Date: 12/02/2009
Violation Points: 1
</Violation>

<Violation>
Violation Type: Speeding
Violation Date: 01/21/2010
Violation Points: 2
</Violation>
<Violation>
Violation Type: Running a stop sign
Violation Date: 11/14/2011
Violation Points: 2
</Violation>
</Driver>

If a **Count Across Category (All Available)** step, used at the Policy level, is used to determine the total number of violations on the policy.

Total Policy Violations [=] The Count (Across All) of Violation Type

The Total Policy Violations would equal 6, because there are six violations on the policy.

Data Type Functions

Data Type functions are an "If step" that checks if a value is numeric, alphabetic, or a date. There are three available in RateManager:

- IsAlpha
- IsDate
- IsNumeric

IsAlpha Step

The IsAlpha step allows you to check if a variable holds an alpha character value.

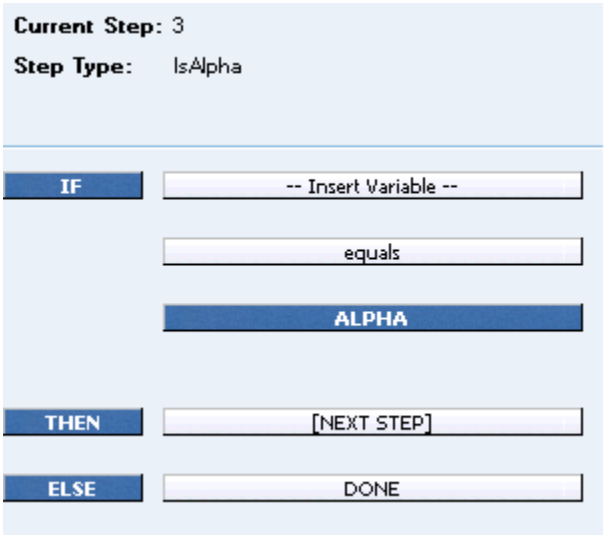


Figure 121 IsAlpha Step

IsDate Step

The IsDate step allows you to check if a variable holds a date value. The date value will be checked using the date format of the program.

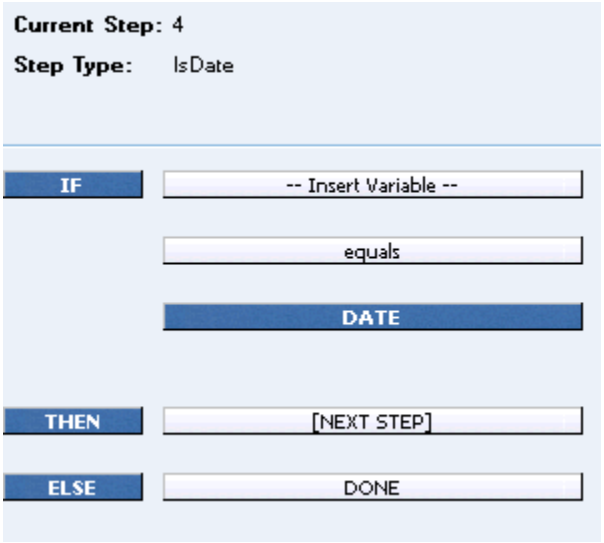


Figure 122 IsDate Step

IsNumeric Step

The IsNumeric step allows you to check if a variable holds a numeric value. The numeric value will be checked using the numeric formats of the program.

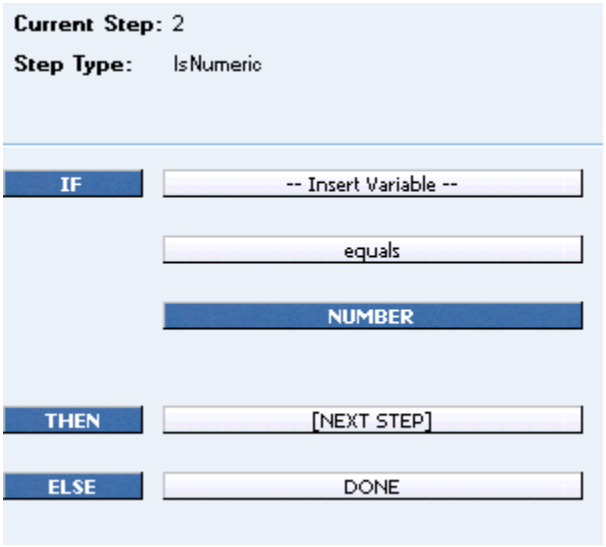


Figure 123 IsNumeric Step

Date Functions

A Date Function step is a special date calculation that calculates the difference between two dates in days, months or years, or adds to a date. There are two types of date functions in RateManager:

- Date Addition
- Date Difference
  - Days
  - Months
  - Years

Date Addition Step

A date addition step is used to add a specific number of days, months or years to an existing date.

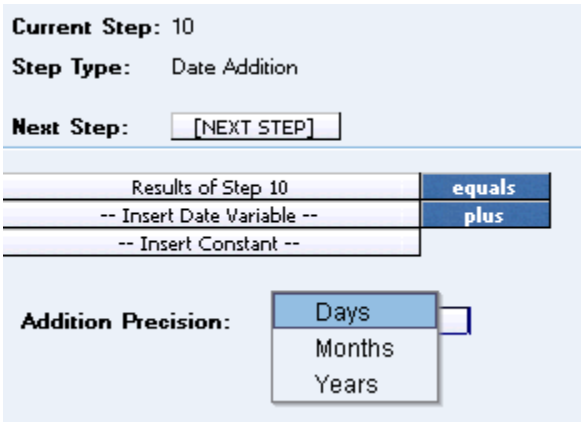


Figure 124 Date Addition

To change the precision used in the addition, click the box next to **Addition Precision** and select the appropriate precision from the popup menu.

Date Difference Step

A date difference step is used to determine the difference between two dates. For example, if you wanted to determine a driver's age, you would use a date difference step and subtract the driver's birth date from the policy effective date.

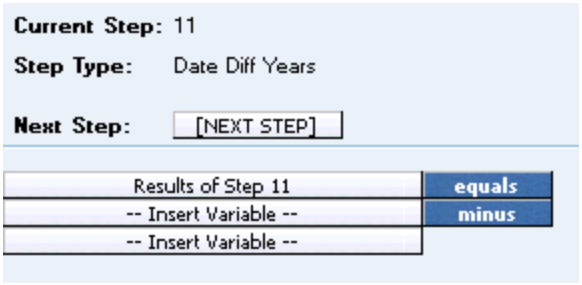


Figure 125 Date Difference

RateManager provides three types of the date difference step.

- **Date Difference (days):** The difference is calculated in terms of how many days have elapsed between the two dates, including leap days. For example, 8/12/2003 - 10/15/1999 would result in 1397, because 1397 days have elapsed between these two dates, including the leap day on 2/29/2000.
- **Date Difference (months):** The difference is calculated in terms of how many whole months have elapsed between the two dates. For example, 8/12/2003 - 10/15/1999 would result in 46, because only 46 whole months have elapsed between these two dates.
- **Date Difference (years):** The difference is calculated in terms of how many whole years have elapsed between the two dates. For example, 8/12/2003 - 10/15/1999 would result in 3, because only 3 whole years have elapsed between these two dates.

If Statements

If statements are used to test criteria and execute certain steps based on whether the statement evaluates to true or false. If Statements can consist of more than one statement. This is called a **Multiple If Statement**. A multiple If Statement allows you to enter a string of statements that either:

- **Contains at least one true statement: OR Condition**
- **Contains all true statements: AND Condition**

OR Condition

A multiple If Statement that contains at least one true statement is done using an **OR** condition. An OR condition will go through the statements until it finds one that is true. When at least one true statement is met, the THEN condition will be processed. If there are no true statements, the ELSE condition will be processed.

For example: If you wanted to execute a statement where Variable A is greater than zero, OR Variable B is less than 1000, OR Variable C [=] 100, then continue, otherwise stop.

IF Variable A [>] O
OR
IF Variable B [<] 1000
OR
IF Variable C [=] 100

(If **any** of these conditions are **true**) THEN Step 2

(If **none** of these conditions are **true**) ELSE Done

AND Condition

A multiple If Statement that contains all true statements is done using an **AND** condition. An AND condition will go through all the statements. If all the statements are true, the THEN condition will be processed. If there are any statements that are not true, the ELSE condition will be processed.

For example: If you wanted to execute a statement where Variable D is greater than zero, AND Variable E is less than 1000, AND Variable F [=] 100, then continue, otherwise stop.

IF Variable D [>] O
AND
IF Variable E [<] 1000
AND
IF Variable F [=] 100

(If **all** of these conditions are **true**) THEN Step 3

(If **any** of these conditions are **NOT true**) ELSE Done

Multiple If Statements must be all OR Conditions or all AND conditions. If you want to run an OR/AND combination, you would have to run an OR Condition step, then an AND Condition step and then use a regular IF Statement.

For example, if you wanted to execute a statement where the RESULT of Step 1 (Variable A is greater than zero, Variable B is greater than 1000 or Variable C is equal to 100), is greater than the RESULT of Step 2 (Variable D is greater than zero, Variable E is greater than 1000 AND Variable F is equal to 100), then you would use the following:

Step 3 would be:

IF Result Step 1 [>] Result Step 2
THEN Step 4
ELSE Done

The assumption is made that Step 1 and Step 2 both completed successfully. If either step failed, the process would have ended and Step 3 would not have executed.

If Statements do not have to be multiple. Multiple IF Statements can be used in Calculated Variables and Algorithms.

There are seven types of If Statements available in RateManager:

- **IF (Normal):** Evaluates to TRUE if the statement is true for the current instance of the element and FALSE otherwise. Can be used for an element in the current category and the current category's parent categories.
- **IF All (All Available):** Evaluates to TRUE if the statement is true for all instances of the element and FALSE otherwise. Can be used for an element in any category.
- **IF No (All Available):** Evaluates to TRUE if the statement is not true for all instances of the element and FALSE otherwise. Can be used for an element in any category.

- **IF Any (All Available):** Evaluates to TRUE if the statement is true for any instance of the element and FALSE otherwise. Can be used for an element in any category.
- **IF All (Use Current Path):** Evaluates to TRUE if the statement is true for all instances of the element and FALSE otherwise. Can be used for an element in the current category, the current category's child categories and the current category's parent categories.
- **IF No (Use Current Path):** Evaluates to TRUE if the statement is not true for all instances of the element and FALSE otherwise. Can be used for an element in the current category, the current category's child categories and the current category's parent categories.
- **IF Any (Use Current Path):** Evaluates to TRUE if the statement is true for any instance of the element and FALSE otherwise. Can be used for an element in the current category, the current category's child categories and the current category's parent categories.

Entering a Multiple IF Statement

A multiple If statement can be entered at any time.

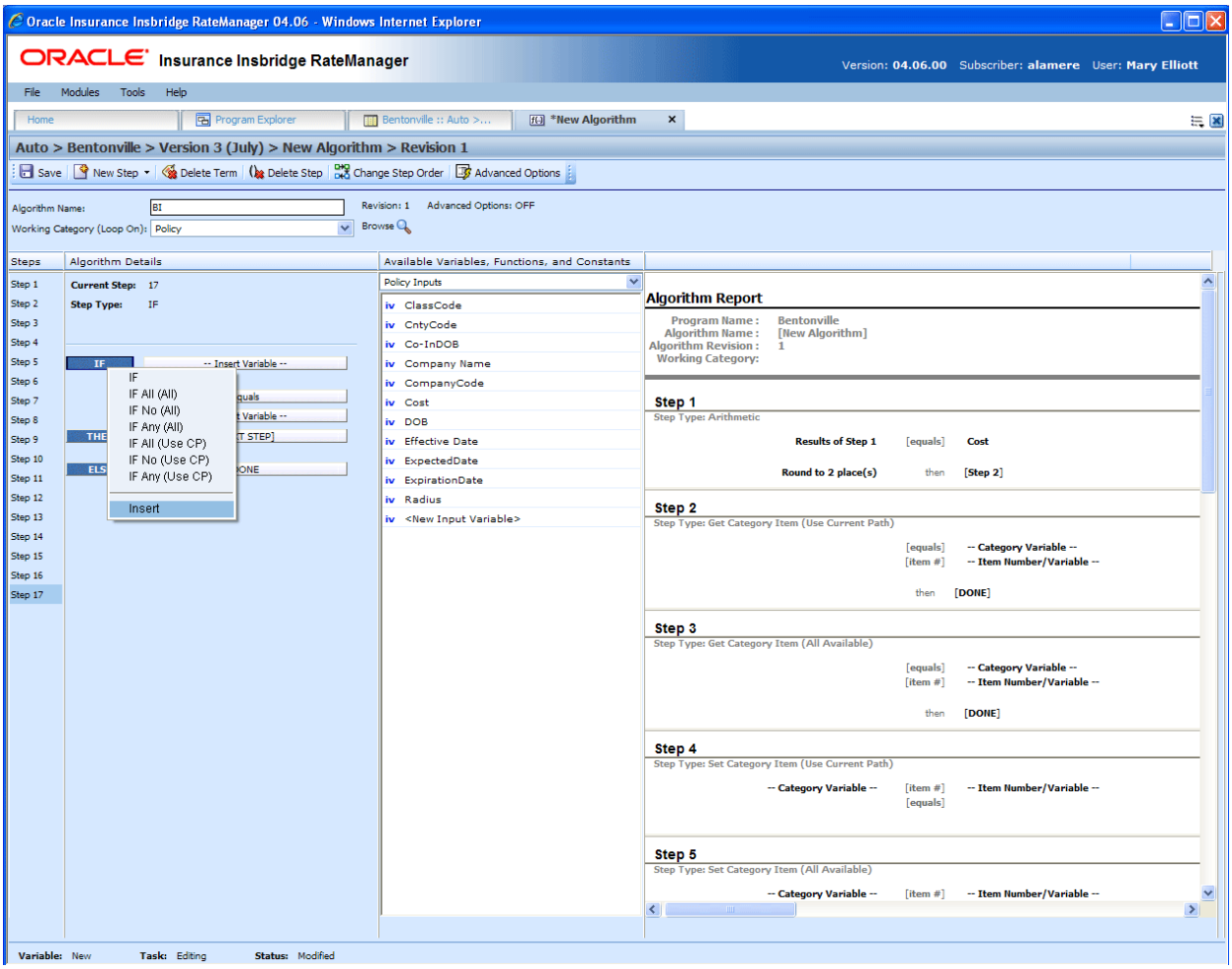


Figure 126 Creating a Multiple If Step

1. Select your New **IF Step Type** from the New Step option at the top of the screen. The screen will refresh with a standard if statement. Enter in your criteria.

2. Right click on **IF**. A popup menu will be displayed. Click **Insert** to insert another statement. The screen will refresh with another if statement directly underneath the first one. Enter in your criteria.

3. Continue until you have all your statements entered. Complete the THEN and ELSE statements.

Editing a Multiple IF Statement

You can change the comparison commands to either all ANDs or all ORs. To change, right click on the AND or the OR blue box. A popup menu will be displayed. Select the comparison command you want. All comparison commands will be changed to the same type.

The IF statement type at the top of the list will apply to all statements listed. An IF statement can be changed to a different type of IF Statement by clicking the blue IF box and selecting a different IF Statement from the popup menu. Whatever you select will apply to all statements listed.

Right clicking the comparison command will also allow you to enter a new statement directly below the selected statement. Right click on the AND or the OR blue box. A popup menu will be displayed. Click **Insert** to insert another statement.

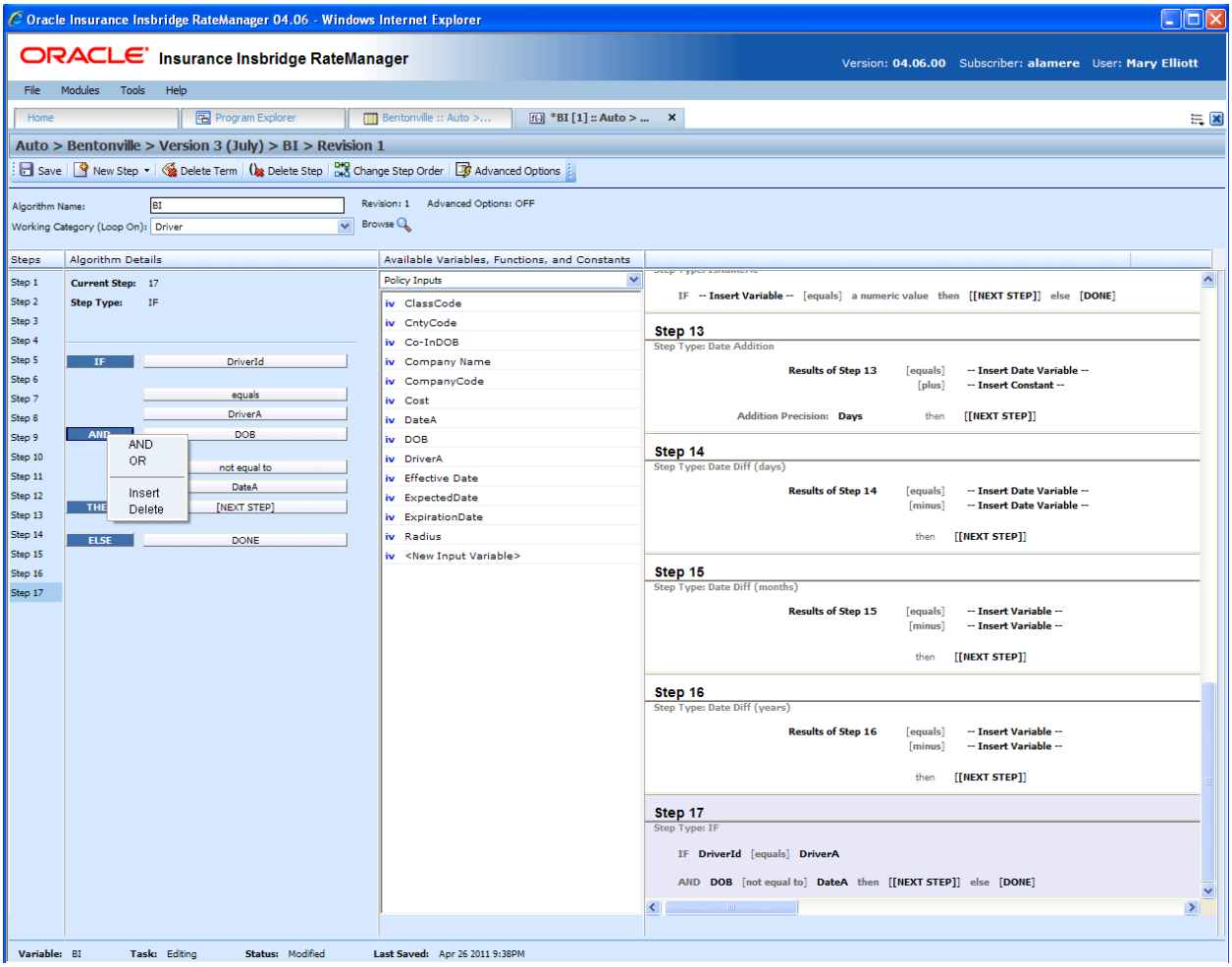


Figure 127 Editing a Multiple If Statement

Deleting a Multiple IF Statement

You can delete a statement you do not need. Right click on the AND or the OR blue box of the statement you want to delete. A popup menu will be displayed. Click **Delete**. The screen will refresh and the statement will be removed.

Mask Step

A mask step is used when you want to use a part of a string. For example, if a vehicle's ID number is passed into the system as VEH01, but you only wanted the last two digits, you could use a mask step to store those digits in another element.

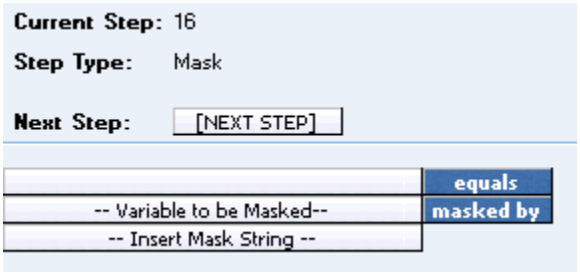


Figure 128 Mask Step

Available Mask Options

Function	Definition	Keystroke(s)
Hold	Holds a character, i.e. keeps the character	~
Remove	Replaces a character with another character	|
Replace	Removes a character Insert adds a character	any character
Insert	Adds a character.	^ + any character

Figure 129 Available Mask Options Table

Examples

Function	Input	Mask	Result
Hold	GA263SX4597	~~~~~	GA263
Remove	VEH01	|||~~	01
Replace	Insbridge	~~~urance	Insurance
Insert	Cat	~^h~^r~	Chart

Figure 130 Mask Option Examples Table

Math Functions

Math Functions are used when you want to perform mathematical operations. Most often this involves creating an equation where a single numeric value can be obtained from plugging in other numeric values and arithmetic operators. Math Functions also allow you to remove any negative values so that you can work with positive values. Math Functions has thirteen options:

- Arithmetic Step
- Absolute Value
- Power
- Log
- Log10
- Exp
- Rand
- Fact
- Sqrt
- Ceiling
- Floor
- Even
- Odd

Arithmetic Step

An arithmetic step is used to perform basic arithmetic, addition, subtraction, multiplication and division. It also can be used to perform bitwise OR and bitwise AND operations. For more information, see Adding a New Element.

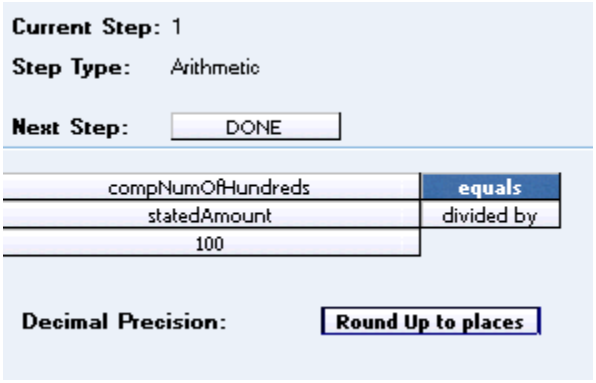


Figure 131 Arithmetic Step

Absolute Value Step

An Absolute Value (formerly get absolute value) step gets the absolute value of the selected variable. The absolute value of a number x, commonly written as |x|, is the number x without regard to sign. For example, the absolute value of -8 (negative 8) is 8.

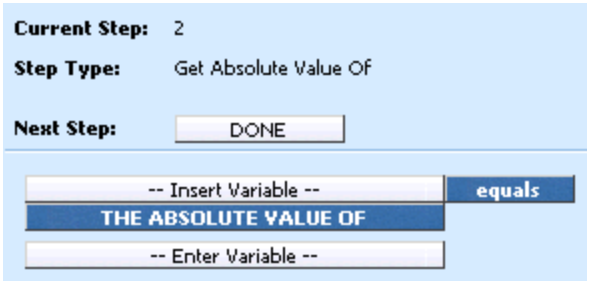


Figure 132 Absolute Value

Power Step

A power step is used when you need to raise a number to a power. The components of the power step are Result, Base, and Power. For the result component, you can choose to use a Result Variable or a Result of Step Variable. For the base component, you can choose to use any variable (with a numeric data type) or a constant value. For the power component, you can choose to use any variable (with a numeric data type) or a constant value.

Example Use Case:

If you wanted to use experience based information (historical claims and/or exposure numbers) as part of your rating logic and you wanted to account for inflation/deflation, then you could use the exponent function to perform the inflation/deflation calculations. If you had claims information from an insured for $10,000, you could estimate that in 5 years time the claim value might increase by 3% a year. This could be represented by $10,000 x 1.03^5 = $11,592.

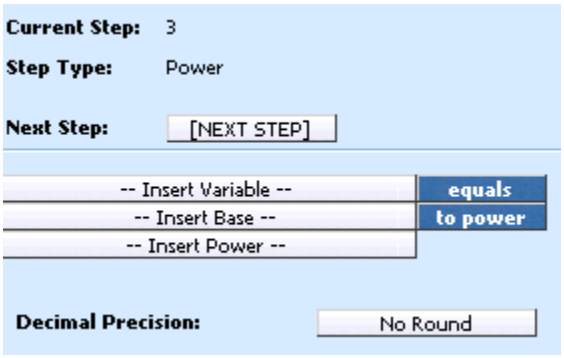


Figure 133 Power Step

Log Step

The log step returns the logarithm of a number to the base you specify. You must enter the number and the base.

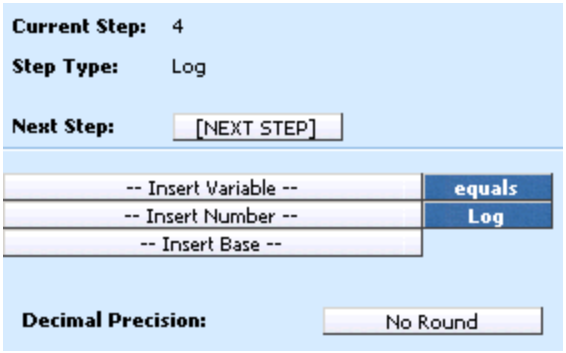


Figure 134 Log Step

Log10 Step

The log10 step returns the base-10 logarithm of a number.

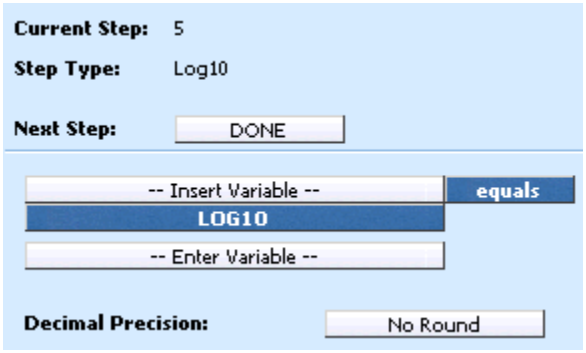


Figure 135 Log10 Step

Exp Step

The exponent step allows for a constant *e* to be raised to the power of a number. The constant *e* equals 2.71828182845904, the base of the natural logarithm.

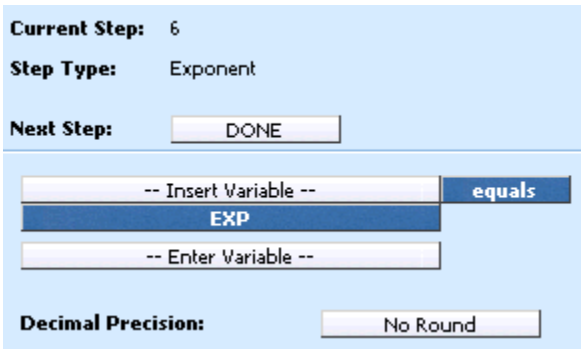


Figure 136 Exponent Step

Rand Step

The random (rand) step returns an evenly distributed random number, greater than or equal to 0, and less than 1. A new random number is returned for every time the random step is used.

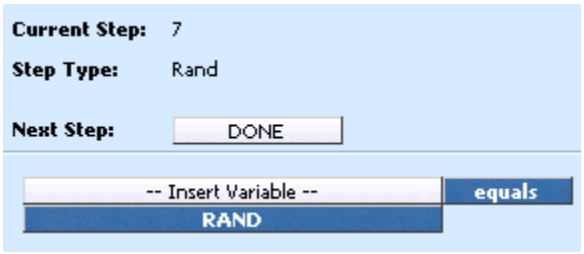


Figure 137 Random Number Step

Fact Step

The factorial (fact) step returns the factorial of a number. Number values must be positive.

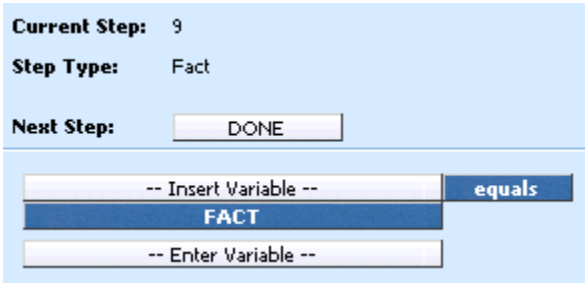


Figure 138 Factorial Step

Sqrt Step

The square root step returns a positive square root of the number entered. If the number is negative, an error is shown.

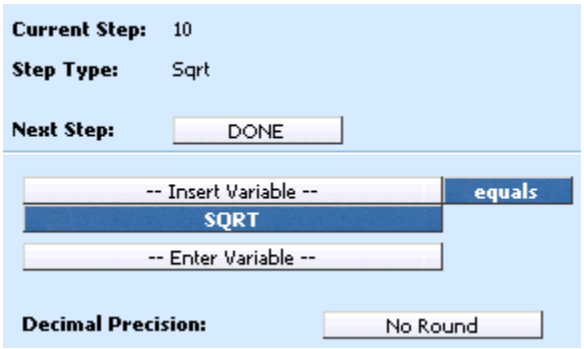


Figure 139 Square Root Step

Ceiling Step

The ceiling step allows for a number to be rounded up away from zero, to the nearest multiple of significance. For example, CEILING(5.68, .5) would result in the ceiling for the number (5.68) being rounded up away from zero by a factor of (.5). Number and significance must be the same sign. You cannot set the number to a negative value and the significance to a positive value. You will need both a number and significance to use this step type.

Example Use Case:

If you want to avoid using pennies in your prices and your product is priced at $4.42, use the formula =CEILING(4.42,0.05) to round prices up to the nearest nickel.

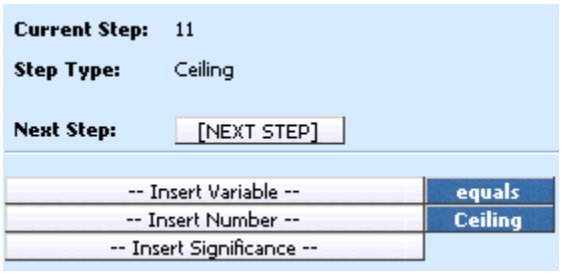


Figure 140 Ceiling Step

Floor Step

The floor step allows for a number to be rounded down towards zero, to the nearest multiple of significance. For example, FLOOR(5.68, .5) would result in the floor for the number (5.68) being rounded down to the nearest zero by a factor of (.5). Number and significance must be the same sign. You cannot set the number to a negative value and the significance to a positive value. You will need both a number and significance to use this step type.

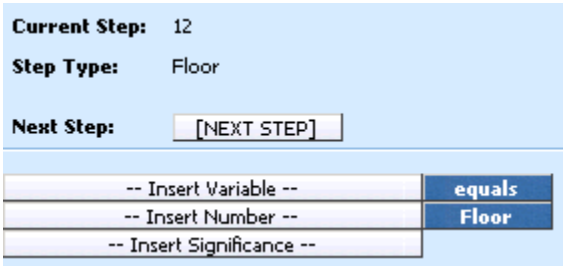


Figure 141 Floor Step

Even Step

The even step allows for a number to be rounded up to the nearest even integer.

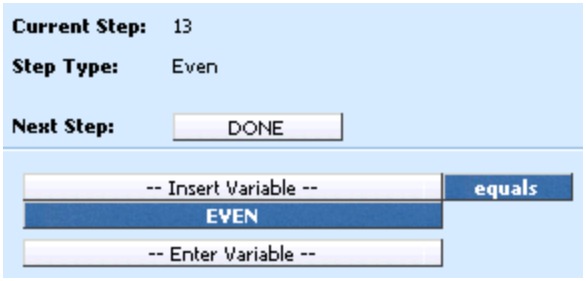


Figure 142 Even Step

Odd Step

The odd step allows for a number to be rounded up to the nearest odd integer.

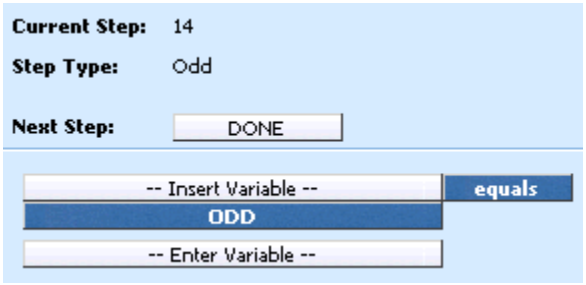


Figure 143 Odd Step

Trig Functions

RateManager has fourteen trigonometry functions available to algorithms, calculated variables and driver assignments.

- Cos
- Cosh
- Acos
- Acosh
- Sin
- Sinh
- Asin
- Asinh
- Tan
- Tanh
- Atan
- Atanh
- Degrees
- Radians

Cos Step

The cos step returns the cosine of the given angle.

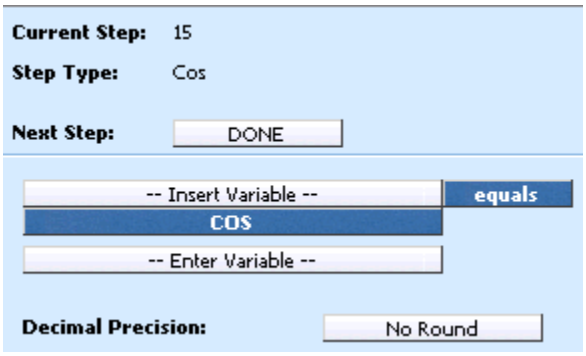


Figure 144 Cosine Step

Cosh Step

The cosh step returns the hyperbolic cosine of a number.

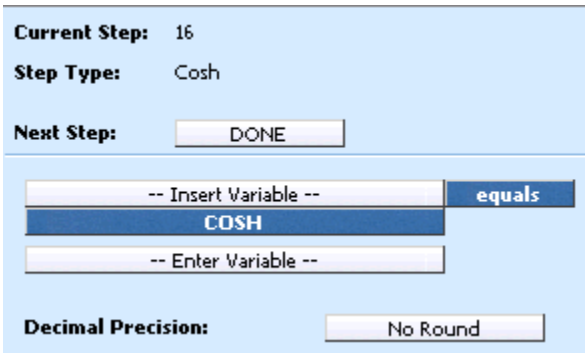


Figure 145 Cosh Step

Acos Step

The acos step returns the arccosine, or inverse cosine, of a number.

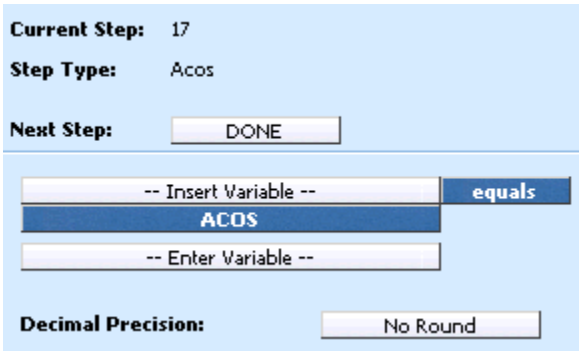


Figure 146 Acos Step

Acosh Step

The acosh step returns the inverse hyperbolic cosine of a number.

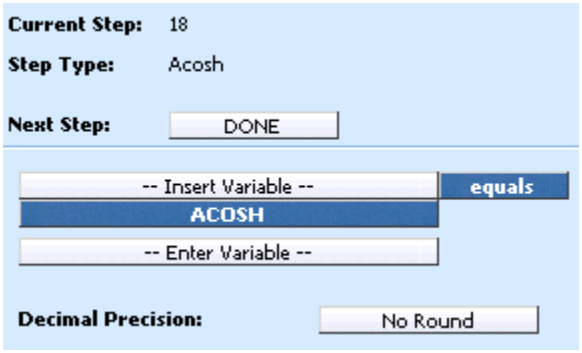


Figure 147 Acosh Step

Sin Step

The sin step returns the sine of the given angle.

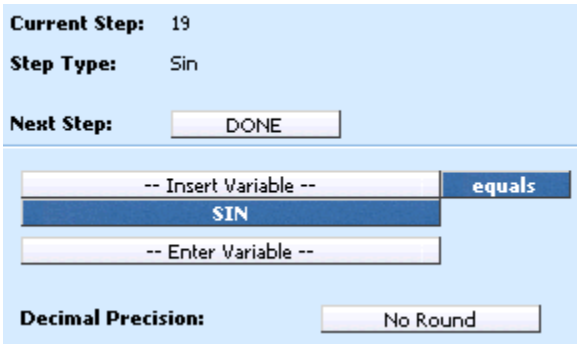


Figure 148 Sine Step

Sinh Step

The sinh step returns the hyperbolic sine of a number.

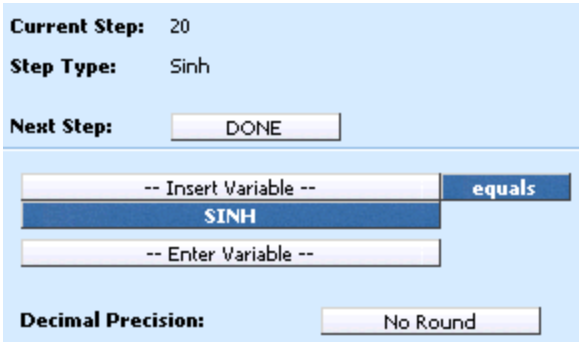


Figure 149 Sinh Step

Asin Step

The asine step returns the arcsine, or inverse sine, of a number.

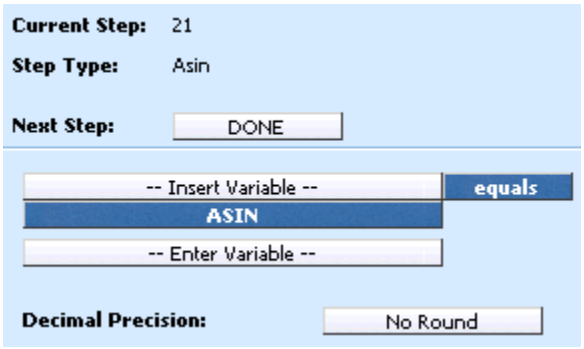


Figure 150 Asin Step

Asinh Step

The asinh step returns the inverse hyperbolic sine of a number.

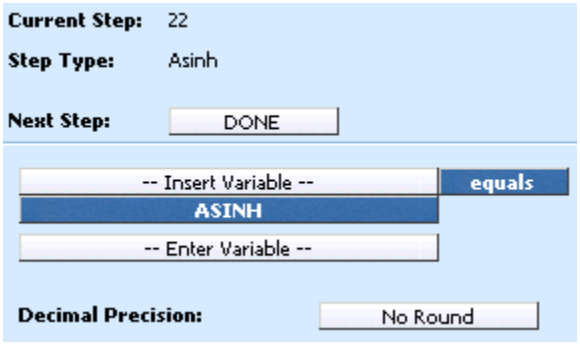


Figure 151 Asinh Step

Tan Step

The tan step returns the tangent of the given angle.

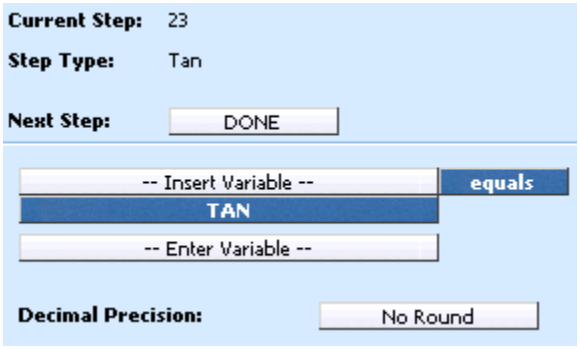


Figure 152 Tangent Step

Tanh Step

The tanh step returns the hyperbolic tangent of a number.

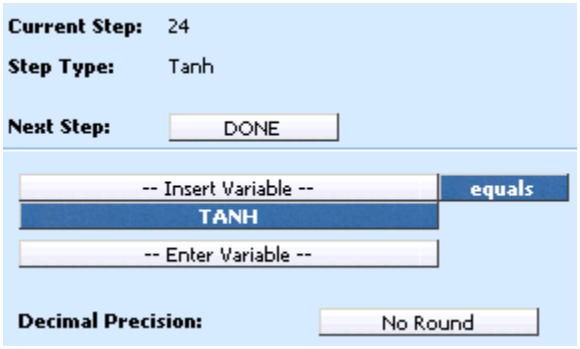


Figure 153 Tanh Step

Atan Step

The atan step returns the arctangent, or inverse tangent, of a number.

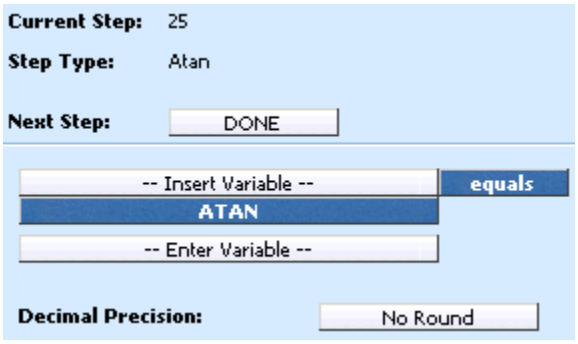


Figure 154 Atan Step

Atanh Step

The atanh step returns the inverse hyperbolic tangent of a number.

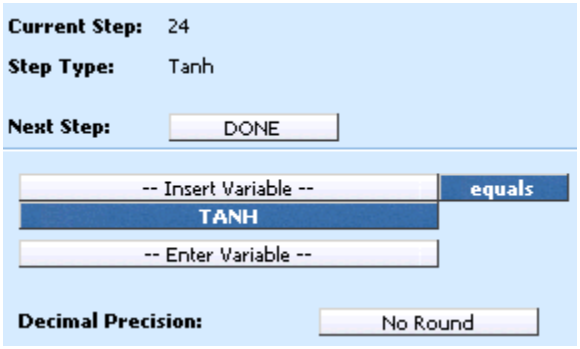


Figure 155 Atanh Step

Degrees Step

The degrees step converts radians into degrees.

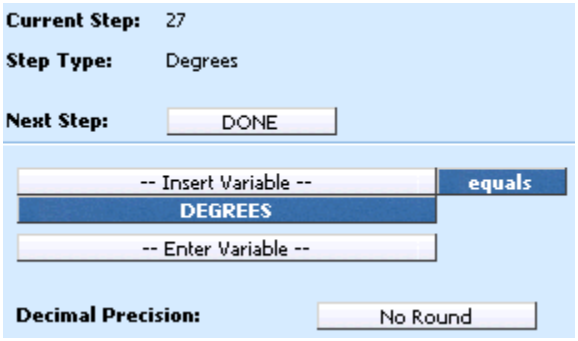


Figure 156 Degrees Step

Radians Step

The radians step convert degrees into radians.

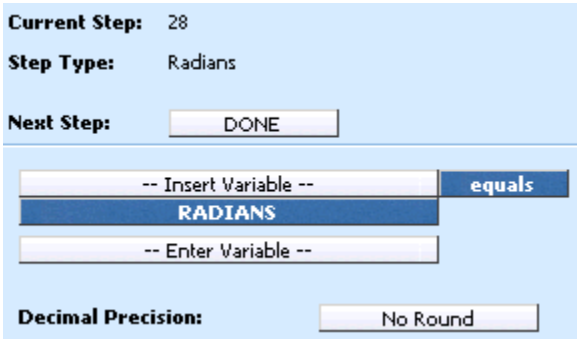


Figure 157 Radians Step

Ranking

A Rank Across category step allows you to rank all instances of a specific element, either highest to lowest or lowest to highest.

There are two types of Ranking Steps:

- **Clear Ranking**
- **Rank Across Category**

RateManager provides four types of the Rank across Category Step.

- **Rank across Category (All Available) (Low-to-High):** Allows you to rank elements in any category, lowest to highest.
- **Rank across Category (High-to-Low):** Allows you to rank elements in the current category, the current category's child categories and the current category's parent categories, highest to lowest.
- **Rank across Category (Low-to-High):** Allows you to rank elements in the current category, the current category's child categories and the current category's parent categories, lowest to highest.
- **Rank across Category (All Available) (Low-to-High):** Allows you to rank elements in any category, highest to lowest.

Clear Ranking Step

When ranking a Ranking Step, the system allows for cascading ranking operations. This step breaks the cascading ranking that is inherent when using back-to-back ranking operations. This step should always be used after a ranking step, when cascading is not desired. When in Driver Assignment, it is recommended to a Clear Ranking function to clear a driver assignment ranking.

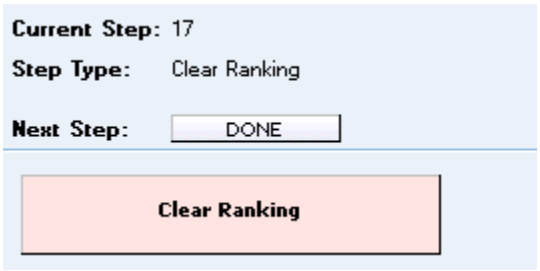


Figure 158 Clear Ranking Step

Rank across Category Step

A rank across category step allows you to rank all instances of a specific element, either highest to lowest or lowest to highest.

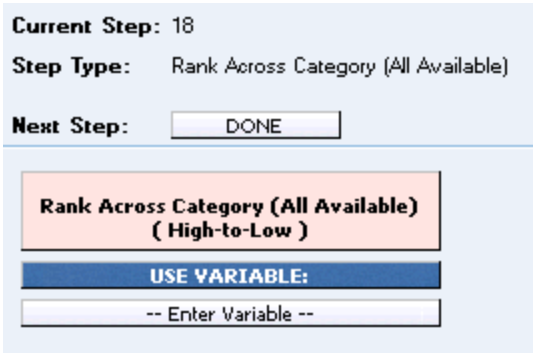


Figure 159 Rank Across Category Step

String Functions

String functions can be used any time you need to modify a 'data' type of string. String Functions include:

- Get Length
- Set Message
- String Addition

Get Length

A Get Length (formerly Get String Length) step gets the number of characters in a specified string. You can use the LEN (Get String Length) function for any string variable. In Figure 131, the **Results of Step 1** will equal 5, since the constant value of "10000" is 5 characters.

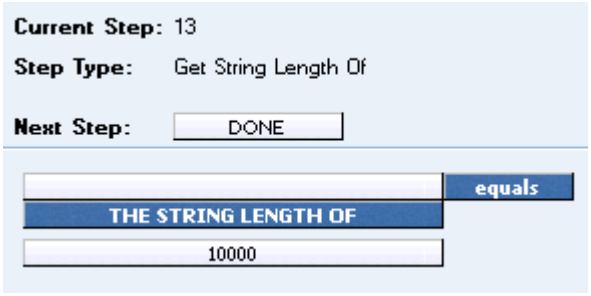


Figure 160 Get Length

Set Message

A Set Message (formerly set string/message) step is used when you want a specific message stored in a string. For example, if you wanted to output the message "Too many claims in last three years." if a policy fails a specific underwriting rule, you would use a message step.

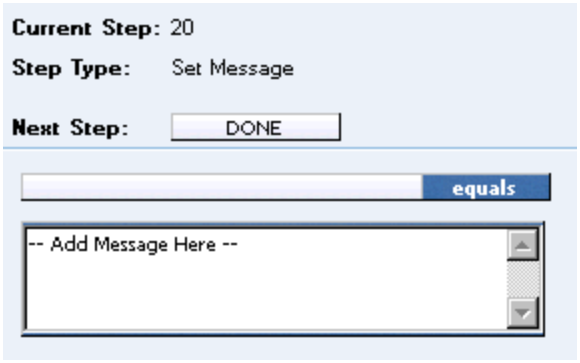


Figure 161 Set Message

The message can contain up to 1024 characters and allows for these special characters: asterisk (*), colon (:), and question mark (?). See Restrictions for more information.

String Addition

A String Addition step is used to concatenate two or more strings or character together. For example, using addition, the string "Ins" plus the string "bridge" would result in "Insbridge".

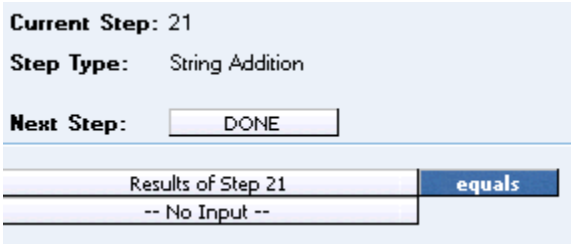


Figure 162 String Addition Step

Sum across Category Step

A sum across category step is used to determine the sum of all instances of a specific element (input, variable, result). For example, if you had a Total Vehicle Premium for each vehicle on an auto policy, and you wanted to know the total policy premium, you would sum across the Total Vehicle Premium.

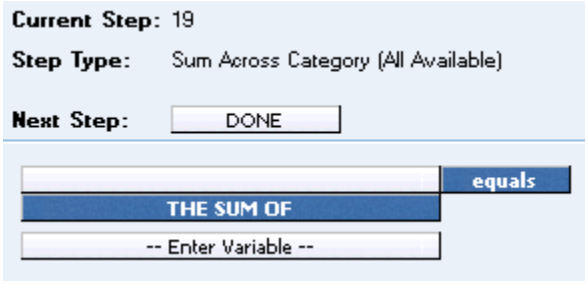


Figure 163 Sum Across Category Step

RateManager provides two types of the Sum Across Category Step.

- **Sum across Category (Use Current Path):** Items in a subcategory of the current category are looked at independently, for each instance of the current category.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2008
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2008
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/2008
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal
  Violation Date: 12/02/2009
  Violation Points: 1
  </Violation>
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/21/2008
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Running a stop sign
  Violation Date: 11/14/2008
  Violation Points: 2
  </Violation>
  </Driver>

  If a **Sum across Category (Use Current Path)** step, used at the Driver level, is used to determine the number of violation points for each driver.

  Total Driver Violation Points [=] The Sum (Using Current Path) of Violation Points

The Total Driver Violation Points would equal 3 for Driver #1, 5 for Driver #2 and 5 for Driver #3.

- **Sum across Category (All Available):** Items in a subcategory of the current category are looked at as a whole.

  Example

  Suppose for an auto policy, you have three drivers, each with some number of violations, as illustrated below:

  <Driver>
  Driver #1
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/04/2008
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Driving without a license
  Violation Date: 05/30/2008
  Violation Points: 1
  </Violation>
  </Driver>

  <Driver>
  Driver #2
  <Violation>
  Violation Type: At fault accident
  Violation Date: 09/19/2008
  Violation Points: 5
  </Violation>
  </Driver>

  <Driver>
  Driver #3
  <Violation>
  Violation Type: Failure to signal
  Violation Date: 12/02/2009
  Violation Points: 1
  </Violation>
  <Violation>
  Violation Type: Speeding
  Violation Date: 01/21/2008
  Violation Points: 2
  </Violation>
  <Violation>
  Violation Type: Running a stop sign
  Violation Date: 11/14/2008
  Violation Points: 2
  </Violation>
  </Driver>

  If a **Sum across Category (All Available)** step, used at the Policy level, is used to determine the total number of violation points on the policy.

  Total Policy Violation Points [=] The Sum (Across All) of Violation Points

The Total Policy Violation Points would equal 13.

Set Underwriting to Fail Step

A set underwriting to fail step is used in an algorithm when you want to halt rating because a policy does not meet an underwriting requirement.

For example, if, in the home line of business, you do not insure homes that are valued at more than $500,000, you could use an underwriting algorithm to check the value of the home and set underwriting to fail if it is greater than 500000. The algorithm could be placed at the beginning of the program sequence and, if it fails, processing time is not wasted calculating premiums for a policy that will not be written.

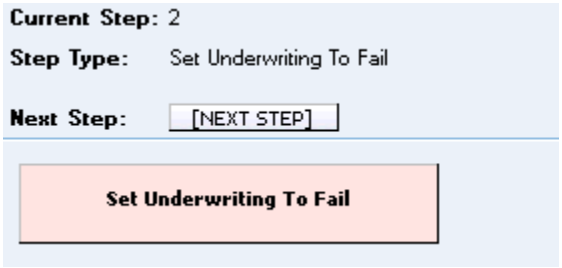


Figure 164 Setting Underwriting to Fail Step

Set Principal Operator Variable

A set principal operator variable needs to be called prior to using selected assignment functions, **Assign All Vehs by Princ Op (Drvs NONEXCLUSIVE)** and **Assign Unassigned Vehs by Princ Op**. This step will set the principal operator indicator needed by the functions.

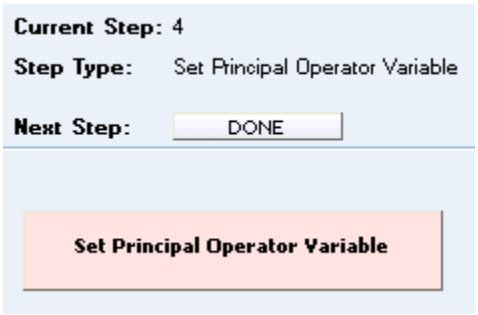


Figure 165 Set Principal Operator Variable

Re-calculate Vehicle Usage Step

The re-calculate vehicle usage step is used when you want change the vehicle usage option for a driver assignment scenario.

For example, at the beginning of a driver assignment scenario you need the vehicle usage option set to Vehicle Usage on Drivers, but at the end you need it set to Driver Usage on Vehicles. You would set the

vehicle usage option for the scenario to Vehicle Usage on Drivers. When you need the vehicle usage option changed to Driver Usage on Vehicles, you would use the re-calculate vehicle usage step.

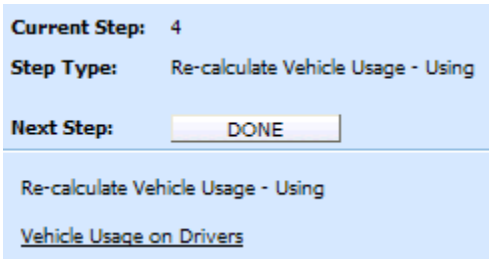


Figure 166 Re-calculate Vehicle Usage Step

RateManager provides four types of the re-calculate vehicle usage step. For more specific information on these options, see the driver assignment topic Vehicle Usage Options.

- **Vehicle Usage by Vehicle Order (Input: 299):** Vehicle usage is designated as the actual vehicle a driver principally operates.
- **Vehicle Usage on Drivers:** Vehicle usage is designated as a percentage a driver operates each vehicle.
- **Driver Usage on Vehicles:** Vehicle usage is designated as a percentage a vehicle is operated by each driver.
- **Vehicle Usage by VehicleID (Inputs: 299/368):** Vehicle usage is designated as the actual vehicle a driver principally operates, based on the vehicle number specified in the input file.

Chapter 15

CALCULATED VARIABLES

Calculated variables are used when a result cannot be derived from simple data mapping in a table. For example, if driver 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 inputs of effective date and driver date of birth.

A calculated variable supports advanced logic, such as arithmetic and if/then functions. Logic and functions within a calculated variable are created as steps. These steps are then added together to form a sequence of calculation.

Calculated variables can be created at two levels:

Global: Global variables are created and managed at the global level and are subline specific. Global variables can be accessed from the Global tab or from the Program Details tab. When selected, variables will be listed in the Folder Details area.

Local: Local variables are created and managed at the program version level and are specific to the program. Local variables can be accessed from the Program Details tab. When selected, variables will be listed in the Folder Details area.

There are a couple of differences between globals and locals. One difference between them is that global variables are available to all programs within the subline while program level variables are available only to the program where they were created. Another is that Global variables can use only global elements. Local variables can use either local or global elements.

Both Global and Local calculated variables can be template generated or created by you. Variables that are user created will be open for editing, copying, creating new revisions and deletion if they are not locked.

Template generated calculated variables will be grayed out and locked and cannot be unlocked. No editing or deleting will be allowed but they can be copied. This is to ensure the integrity of the template. New variables can be added to a template and new revisions can be created. These new variables will be open for editing, copying or deletion, unless the program version is locked.

CALCULATED VARIABLE OPTIONS

- Creating a Calculated Variable
- Editing a Calculated Variable
- Copying a Calculated Variable
- Deleting a Calculated Variable
- Creating a Variable Revision Calculated
- Changing the Active Revision of a Calculated Variable
- Deleting a Calculated Variable Revision
- Creating a Custom Value
- Resolving Dependencies

Navigating to Calculated Variables:

There are two paths to view and manage variables, either from the Globals tab or from the Program Details tab. The Global tab will display global variables only. You cannot view or manage local variables on the Global tab. On the Program Details tab, you can select to view either global variables or local variables. If you want to view and manage local variables, you must use the Program Details tab. The views and options are the same on either tab.

From either tab, when you select Calculated Variables in the Program Details Folder, the current calculated variables will be listed in the Folder Details area.

Calculated variables will not be an option on the Program Explorer tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.

2. Select the Line of Business→Subline→Folder→Program → Program Version. You also can access calculated variables from the globals tab. Line of Business→Subline→Globals.

3. Open the program version to get the Program Details tab. Calculated Variables are available from the program details folders area on the left hand side of the tab.

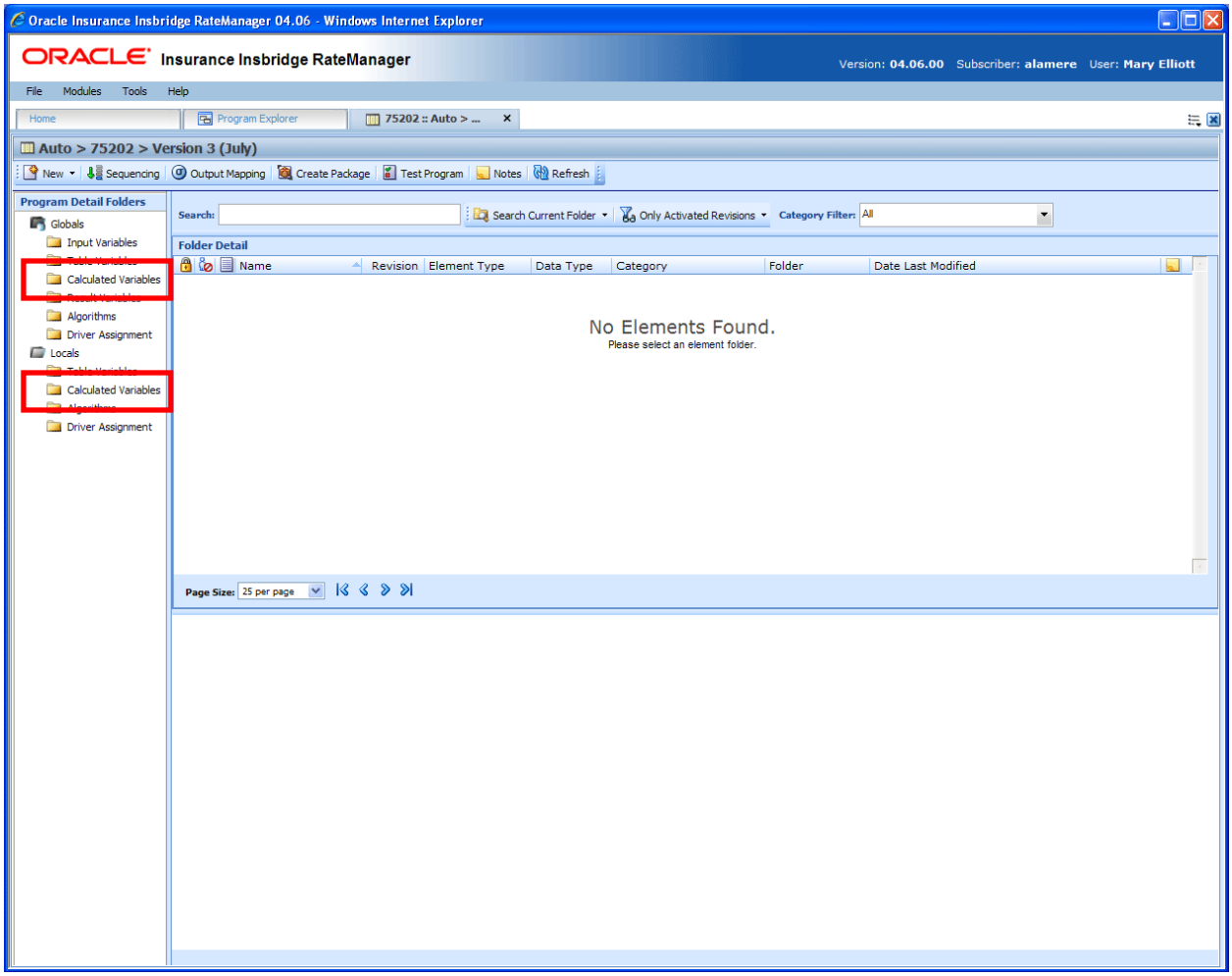


Figure 167 Calculated Variable Navigation

FUNCTIONALITY

Available functions can be accessed from the menu bar located at the top of the screen and from the right click menu of any unlocked calculated variable.

- **Calculated Variable Functions:** The copy and delete functions can be performed on the Program Details tab using a right click menu. Reports also can be generated using the right click menu on the Program Details tab.
- **Calculated Variable Revision Functions:** You will be able to view, copy, and delete calculated variable revisions. Active revisions can be set on the Program Details tab as well.
- **Calculated Variable Tab:** When you create a new calculated variable, edit an existing variable, or work with revisions, you will be placed on the Calculated Variable tab.

Functions:

The functions you can perform will depend on the status of the calculated variable. Locked calculated variables will have fewer options. There are icons that can tell you at a glance what the status of the calculated variable is.

Icon	What it Indicates
	Calculated Variable. Global Calculated Variables are subline specific and can be created at the global level, or from a program version. Local Calculated Variables are program specific and can be created at the program version level. Local Calculated Variables will be displayed on the Program Details→Local Calculated Variables. The same variable listing will also be available for Subline→Globals tab. The same options, new, edit, copy and delete are available on either tab.
	Locked Variable. Locked calculated variables are not open for editing. A lock icon indicates that this calculated variable is locked by a program and is not open for copying, editing or deleting. If the calculated variable is locked because the program is locked, you must return to the program and unlock it. This will unlock the calculated variable and changes can be made.
	Template Lock. If the calculated variable is locked because it came from a template, you will not be able to unlock the variable. You can create a new calculated variable if necessary.
	In-Use. Variables that are in use are currently being worked on by another user in the system or variables that you have open in another tab are not open for editing, copying, or deleting. The variable will be available when the user exits the variable.
	Active Revision. This variable is the current active revision.

FIELDS

The fields are the same for the Global Tab and Program Details. For more on field descriptions, please see Program Details→Fields.

CALCULATED VARIABLE TAB

The Calculated Variable tab will be available when you create a new calculated variable, edit an existing variable, or work with revisions. You also can be placed directly on the Calculated Variable tab from the *My Recently Opened Calculated Variable* snap on your Home tab.

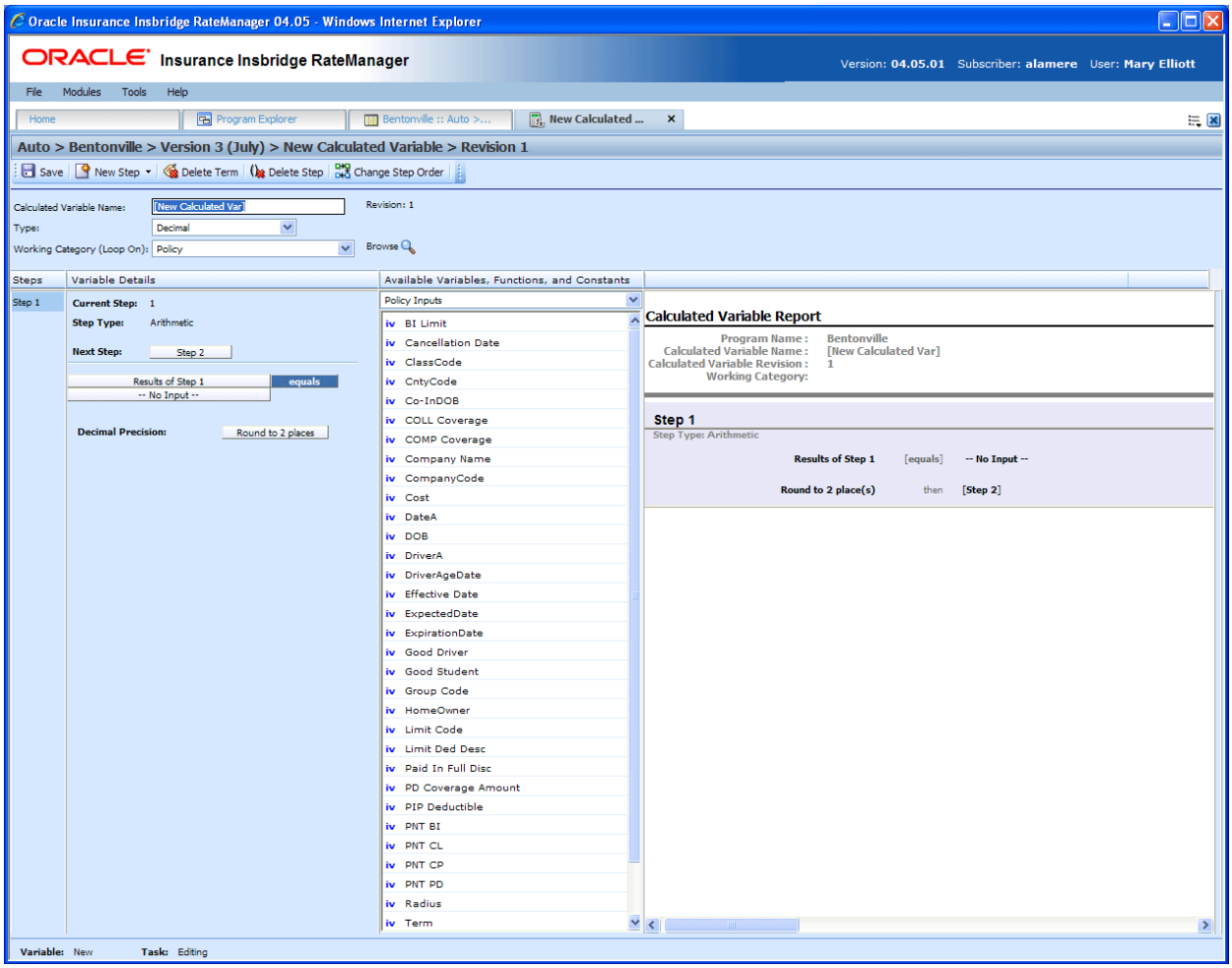


Figure 168 Calculated Variable Tab

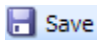
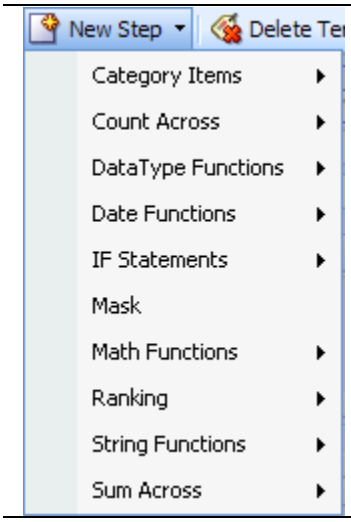
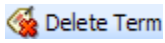
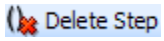
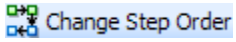
Calculated Variable Rules:

- The first step of a new calculated variable is always an arithmetic step. If you do not want an arithmetic step as your first step, add the step type you do want as Step 2. You can then delete the automatic arithmetic step.
- You cannot have a calculated variable without any steps. There will always be at least one step. You will not be able to delete the last remaining step.

FUNCTIONALITY

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

Functions:

	**Save:** Saves the calculated variable.
	**New Step:** Creates a new step in the calculated variable. For more information, see Working with Steps.
	**Delete Term:** Deletes the currently selected term from a step in the calculated variable.
	**Delete Step:** Deletes the currently selected step. You cannot delete the last step of a calculated variable.
	**Change Step Order:** Allows users to change the order of the steps without using the drop and drag feature.

FIELDS

There are four areas on the Calculated Variable Tab.

- **Variable Information:** The variable information area contains the name and defines the data type, and working category of the calculated variable.
- **Variable Details:** The details area is where you enter the steps that the calculated variable will perform.
- **Available Variables, Functions and Constants:** The list of the available variables, step types and constants that can be used in the Variable Details area.
- **Calculated Variable Report:** A listing of all the steps currently in the calculated variable.

Variable Information

The variable information area is where you define the calculated variable.

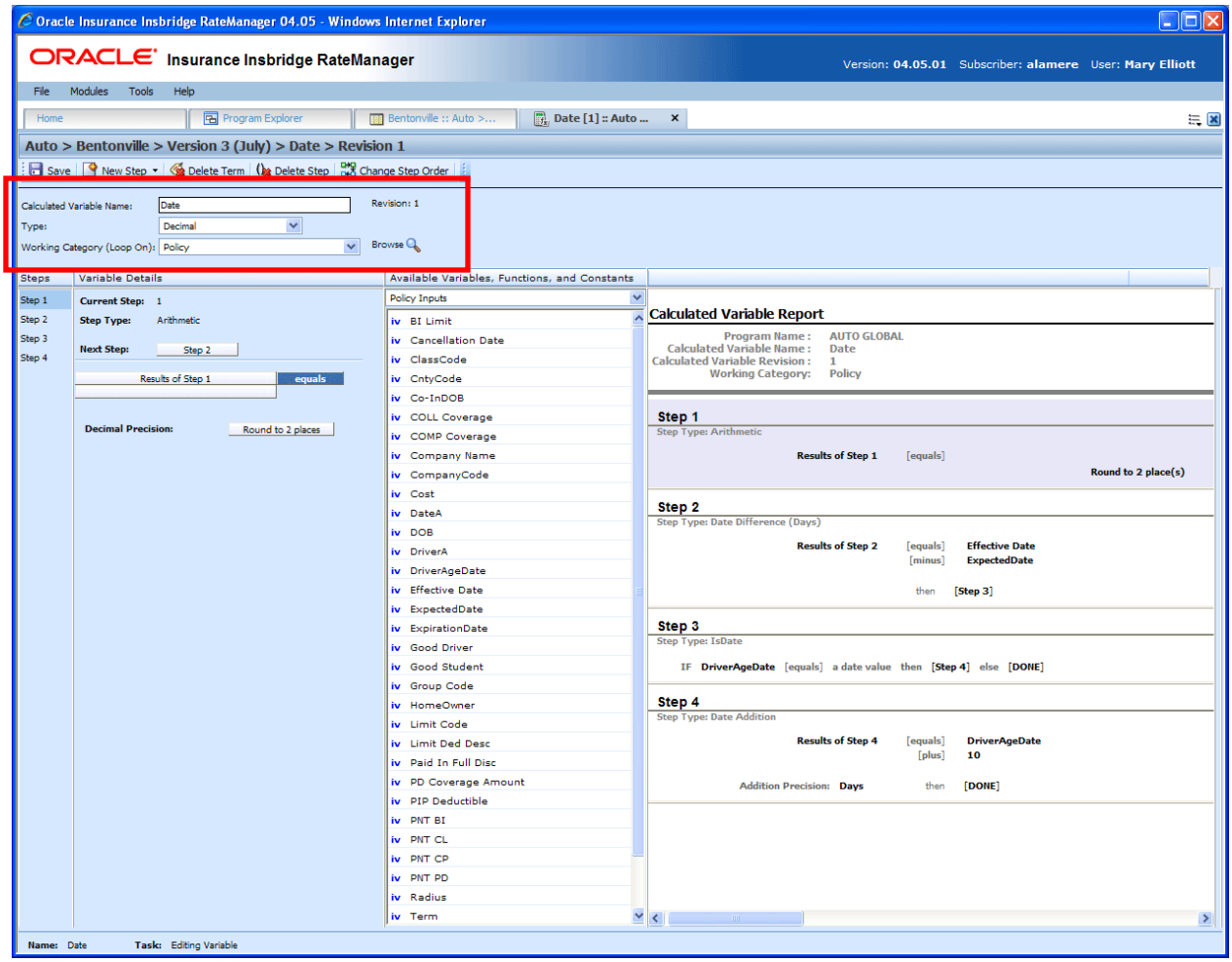


Figure 169 Calculated Variable Information Field

Fields

Calculated Variable Name: Entry for what you want the variable to be called. Alphanumeric characters are permitted, but no special characters (ex: &, *, '', +, @, etc) are allowed.

Type: Type of data associated with the variable. Options are:

- **Integer:** Used for whole numbers
- **String:** Used for any alpha numeric characters, including special characters
- **Decimal:** Used for numbers with decimal points
- **Date**: Used for dates

If disabled by the system administrator in the configuration file, the data type cannot be changed for any existing variables.

Working Category: Sets the category where this variable will be run. For example, if you have an auto test case with three vehicles, any variable set in the vehicle category will be run three times, once for each instance of the vehicle.

You can select the working category from the drop down menu or you can browse for a working category by clicking **BROWSE**. This will bring up the Browse Category popup. From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the working category section.

The Working Category determines the options displayed in the Available Variables area. For example, if you select Policy as the Working Category, then the menu choices in the Available Variables area will be Constants, Step Variables, Policy Inputs, Policy Variables and Policy Results. If you select Vehicle, the options will now include Vehicle Inputs, Vehicle Variable and Vehicle Results along with Constants, Step Variables, Policy Inputs, Policy Variables and Policy Results.

Variable Details

This area contains the steps that the calculated variable will perform.

A new calculated variable always begins with an arithmetic step as **Step 1**. If you do not want an arithmetic step as your first step, add the desired step and then delete the arithmetic step. To do so, highlight **Step 1** and click **DELETE STEP** in the menu bar at the top of the tab.

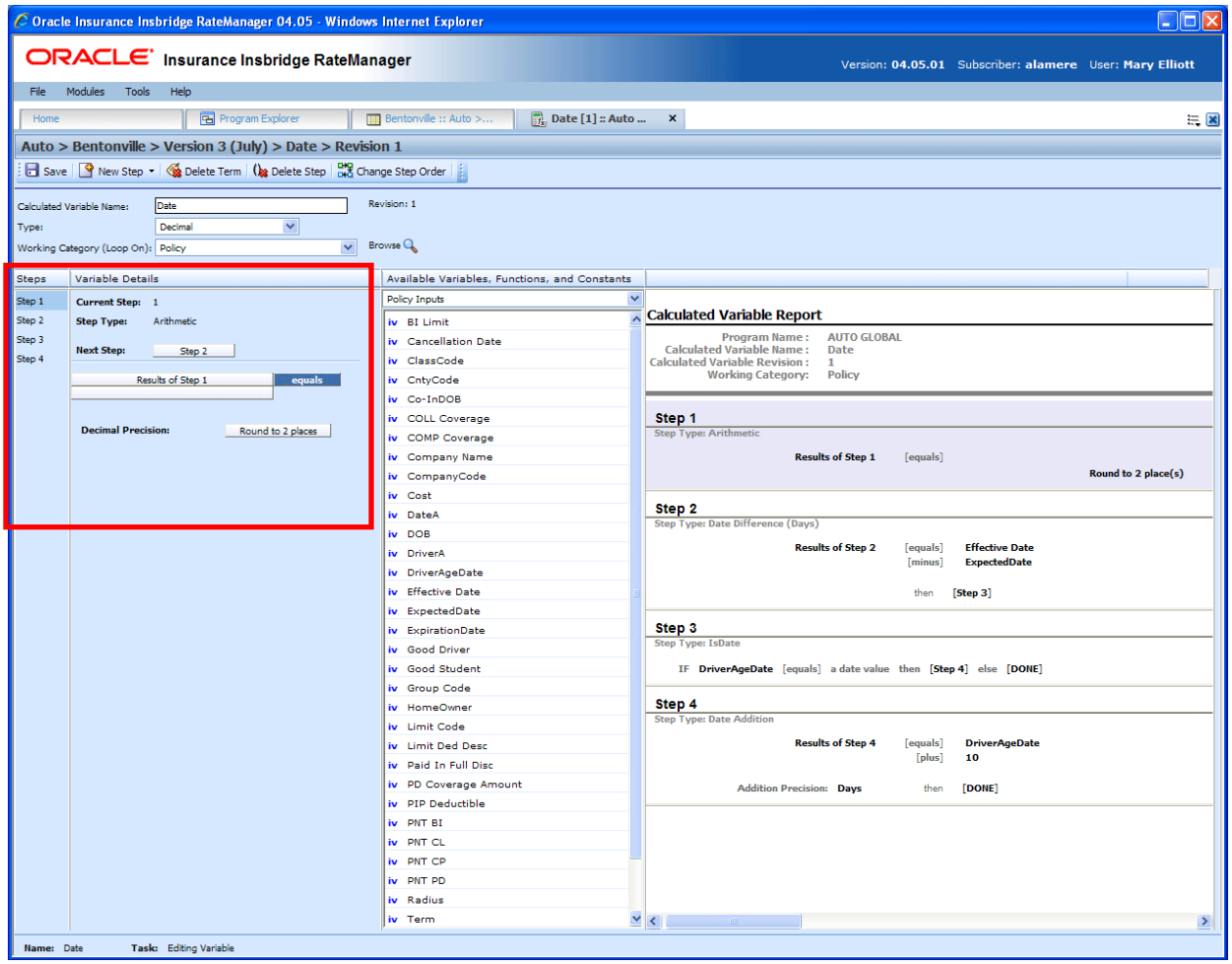


Figure 170 Calculated Variable Selection Criteria Field

Fields

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Variable Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set by clicking on the text box next to **Decimal Precision**. You can select a rounding precision from 0 to 9 digits.

Inputs and variables will have a right click menu available; View Report, View Where Used and Custom Value.

Available Variables, Functions and Constants

The Available Variables, Functions and Constants area contains a listing of available inputs, variables, and results, sorted by category and system constants that can be used as criteria. For global variables, only other global variables or inputs may be used. You cannot use any local variables in the creation of a global variable. A globe icon is used to indicate a global variable.

For Inputs, you will be able to add a new input variable without leaving the Edit Calculated Variable tab. Scroll to the bottom of the available variables list and select <New Input Variable>. A popup will be displayed that will allow you to enter a new input variable.

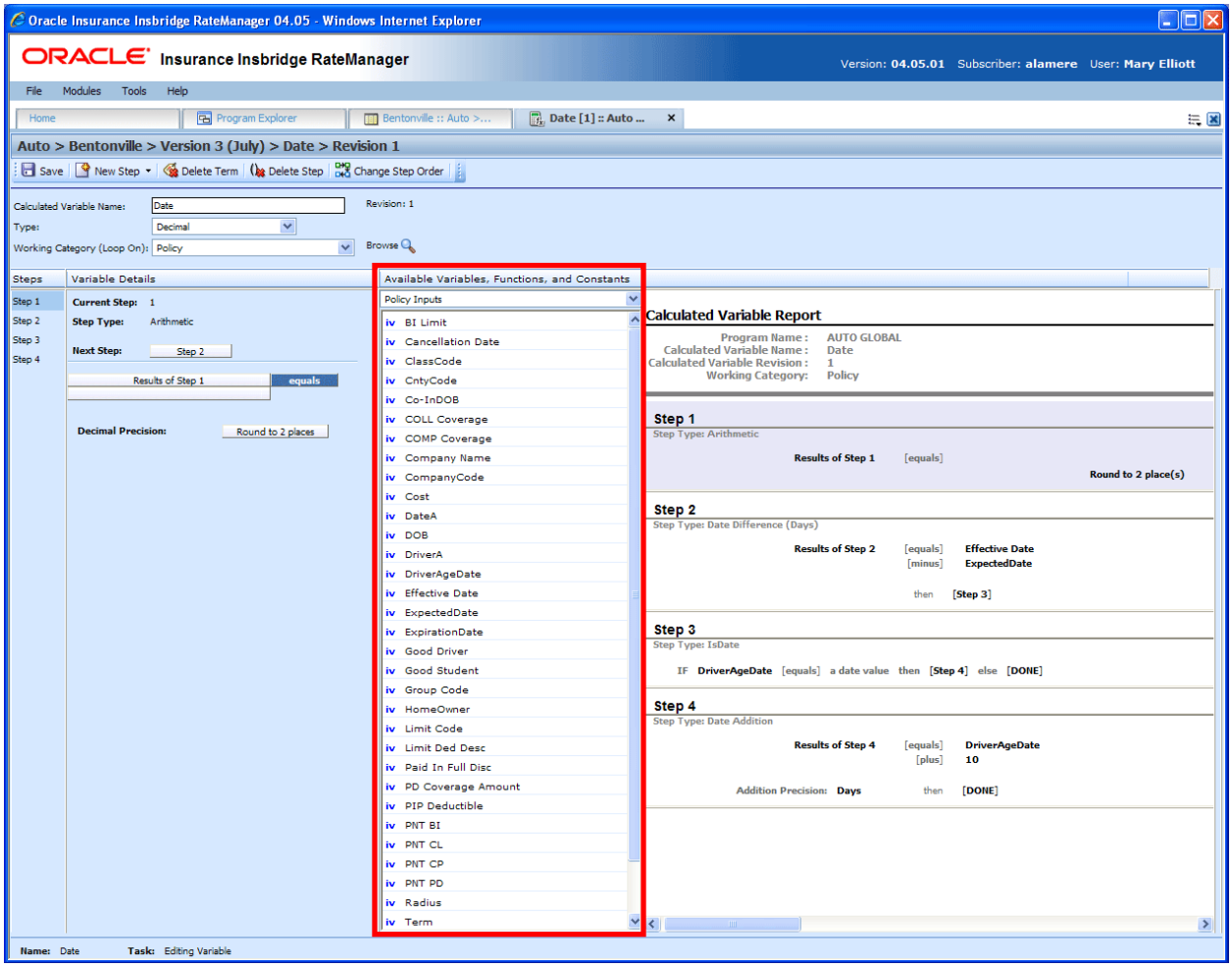


Figure 171 Available Variables, Functions and Constants Field

Fields

Menu: The menu is the top most field. Click the down arrow to select the category you want. Policy variables will be available for all categories. Driver and Vehicle categories will be available in the Driver-Vehicle category. Categories are determined in the Variable Information area.

Selection: The available variables, constants and step results will be listed. Variables will be based on the working category you select. Policy level inputs variables and results will always be listed. If you select another category, that categories inputs, variables and results will be listed.

Selection	Description
Constants	Selection of system constants, category instances and system date and time. Or you can create a custom value for use in this program.
Step Variables	Results from the previously entered steps.
Policy Inputs	Inputs in the Policy category.
Policy Variables	Table and calculated variables in the Policy category.
Policy Results	Result variables in the Policy category.

Listing may also include other category inputs, variables and results.

Calculated Variable Report

This area contains a detailed list of the steps you have entered. This information is view only. No actions can be performed in this area.

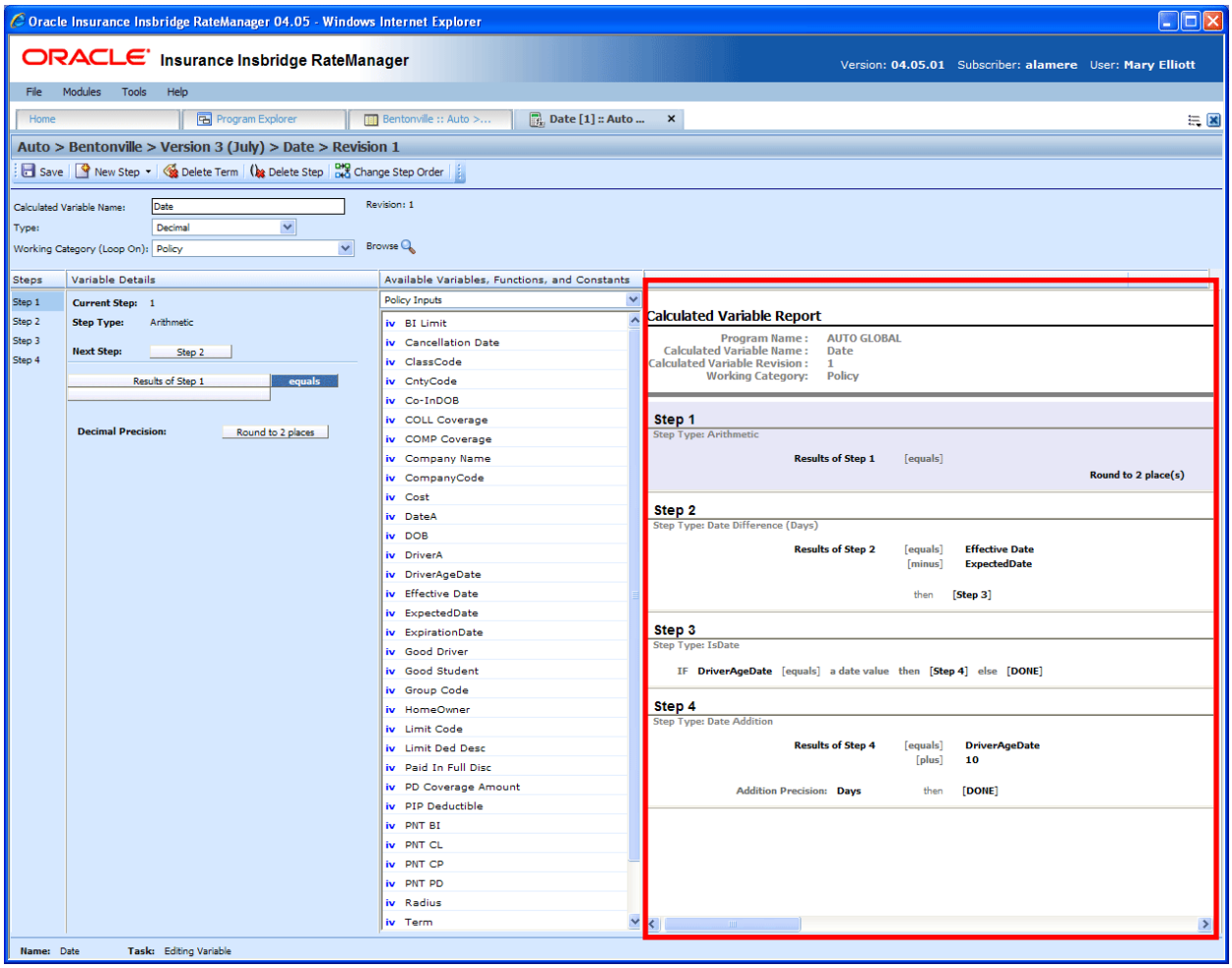


Figure 172 Calculated Variable Report

CREATING A CALCULATED VARIABLE

Calculated variables can be created and added to standard programs and template generated programs. Local calculated variables will be available in the program where you created it and can be copied to other programs within the subline. Global calculated variables will be available across the subline.

Local and global calculated variables are created and function in much the same way. One difference is that global calculated variables can use only global table variables, inputs and result variables. Local calculated variables can use both local and global elements. Another difference is that global calculated variables can be created from the globals tab and from the program details tab.

To Create a Calculated Variable

1. On the Program Details tab of the program where you want to create a new variable, select either the Global Calculated Variables folder or the Local Calculated Variables folder.

2. Click **NEW** in the top bar menu. If you do not select a folder, you can select NEW→Globals→Calculated Variable or NEW→Locals→Calculated Variables.

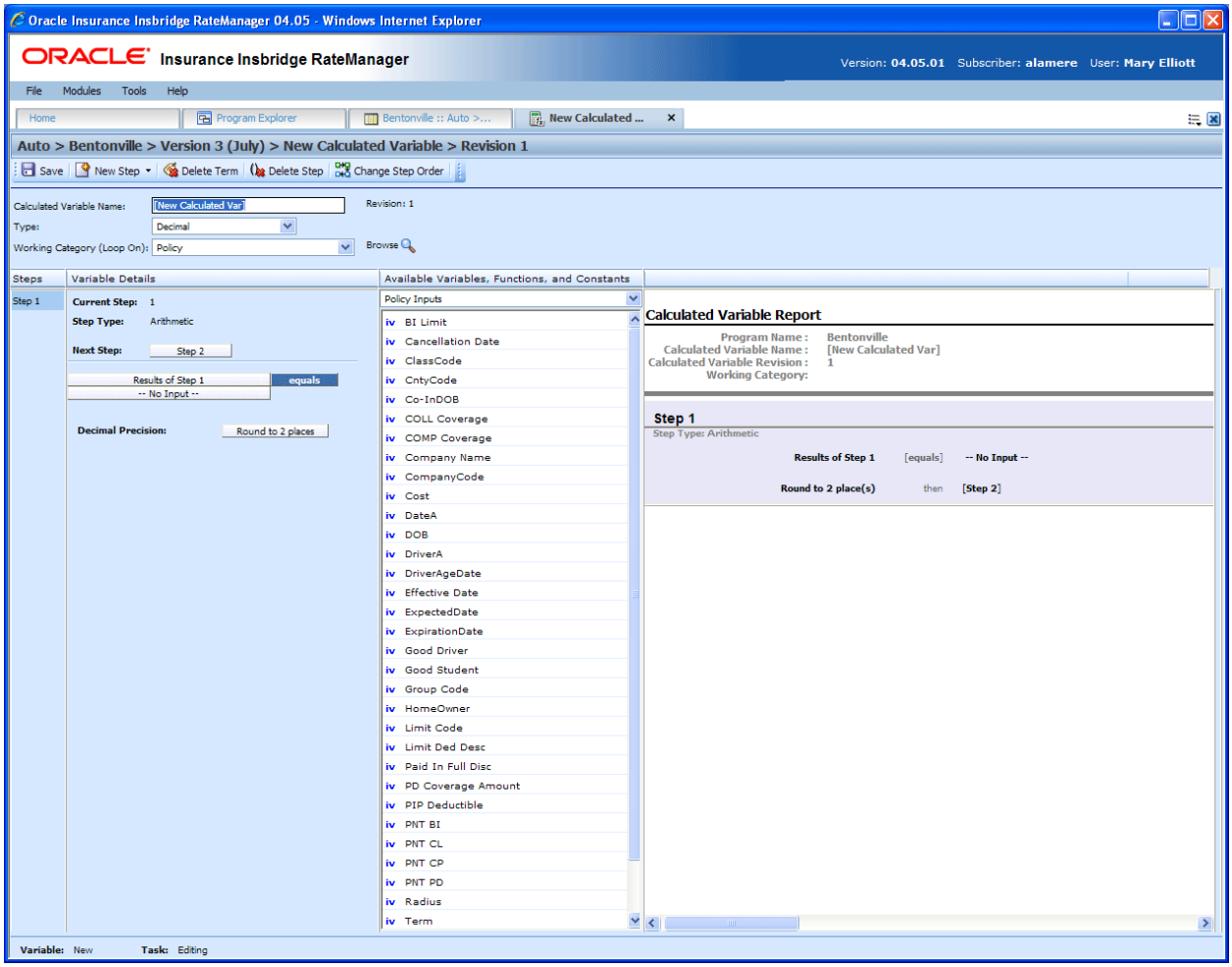


Figure 173 Creating a New Calculated Variable

3. This will open the **Edit Variable** tab for the new variable where you can enter or select the variable elements you need.

4. Enter a **Name** for the calculated variable.

5. Select the **type** of data associated with the variable. Options are:
   - **Integer**
   - **String**
   - **Decimal**
   - **Date**

6. Choose a **Working Category**.

   You can select the working category from the menu or you can browse for a working category by clicking BROWSE to bring up the Browse Category popup.

   From here you can navigate to the Category you want. Once you have selected the category, click **OK**. The category will auto fill in the working category section.

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

NOTE: *Always save a calculated variable after defining the variable name, data type, and working category. The calculated variable will not be available to be used within a step until the variable has been saved.*

7. The first step will be populated in the Variable Details area. This must be a mathematical step. If you do not want an arithmetic step as your first step, add the desired step and then delete the arithmetic step. To do so, highlight **Step 1** and click **DELETE STEP** in the menu bar at the top of the tab.

8. To add a new step, click **NEW STEP** and select the type of step you want to add. For more information on the types of steps, see Working with Steps.

9. The screen will refresh with the new step parameters. Depending upon the step type, you will have to select the appropriate variables, functions, constants or inputs. The value you need to select will be listed on the step.

   For example, if the step has an “Enter Variable” box, you must choose a variable from the menu in the Available Variables, Functions and Constants area. The options will be populated underneath. Click the “Enter Variable” box and then double-click the corresponding variable you want. The box will refresh with your selected value.

10. Continue entering steps until complete. When you are finished making your entries, click **Save**.

Adding an Input Variable or a Custom Value Constant

A new input variable, result variable or custom value constant can be created while entering or editing a calculated variable without leaving the Edit tab.

- To add an **Input Variable**: See Adding a New Input from Another Area
- To add a **Custom Value Constant**: See Constants

EDITING A CALCULATED VARIABLE

The **Edit Calculated Variable** tab is where you can change variable information such as name, data type, working category and steps. If the variable is locked, no changes will be allowed.

Variables that are grayed out or locked cannot be edited. Template generated variables that are using revision 1 are not open for editing. If you want to edit a template generated calculated variable, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed.

NOTE: *If a change is made to a global calculated variable, the change affects all programs that use the global calculated variable. If a change only needs to be made to one particular program, create a local calculated variable in the program and have the program reference the local calculated variable instead of the global.*

To Edit a Calculated Variable

1. On the Program Details tab, select the **Calculated Variable** you want to edit.
2. Double click or right click and select **EDIT**. The Edit Calculated Variable tab will open with the details of the variable.
3. Make any changes.

   To change the step order, you have two options:

   - **Option 1:** Select a step in the Steps column, drag it to a new location in the list and drop it.
   - **Option 2:** Select the step you want to move and click CHANGE STEP ORDER. A separate screen will be displayed.
     - The current step position will be displayed at the top of the screen. Select where you want the step to be placed.
     - Click OK. You will be returned to the edit calculated variable tab. Your step should be placed where you chose.

   To delete a step, select the step in the Steps column and then click DELETE STEP. You cannot delete the last step from a calculated variable.
4. Click **SAVE** to save your work.

COPYING A CALCULATED VARIABLE

Calculated variables may be copied within any program. In your default subline, you can copy calculated variables to another program within the same subline. Template sublines will allow you to copy within the same program only. When copying a local calculated variable, there are two copy options:

- **Existing Program:** Copy the variable into the existing program under another name.
- **Other Program:** Copy the variable into another program within the same subline. This option is for calculated variables within your default subline.

Global calculated variables will not have any copy options.

To Copy a Calculated Variable

1. Select the calculated variable you want to copy and right click it. Select **COPY** from the menu.

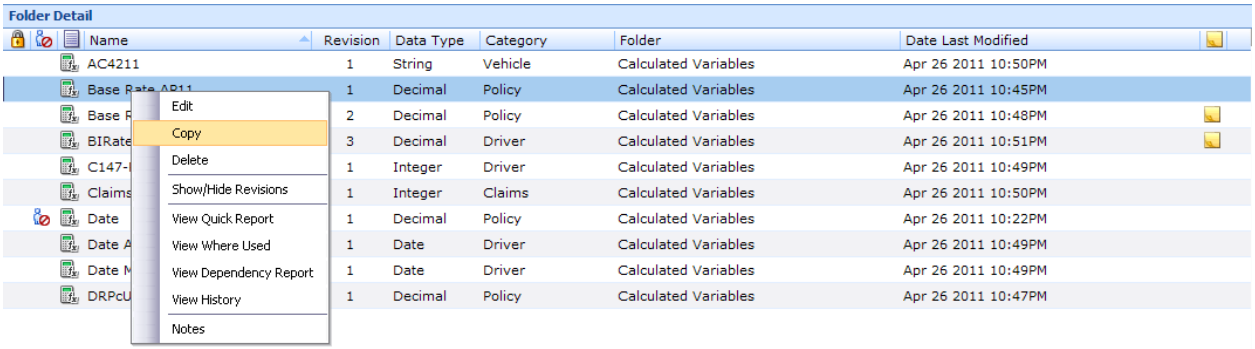


Figure 174 Copy Variable Menu

2. A separate popup window will be displayed.

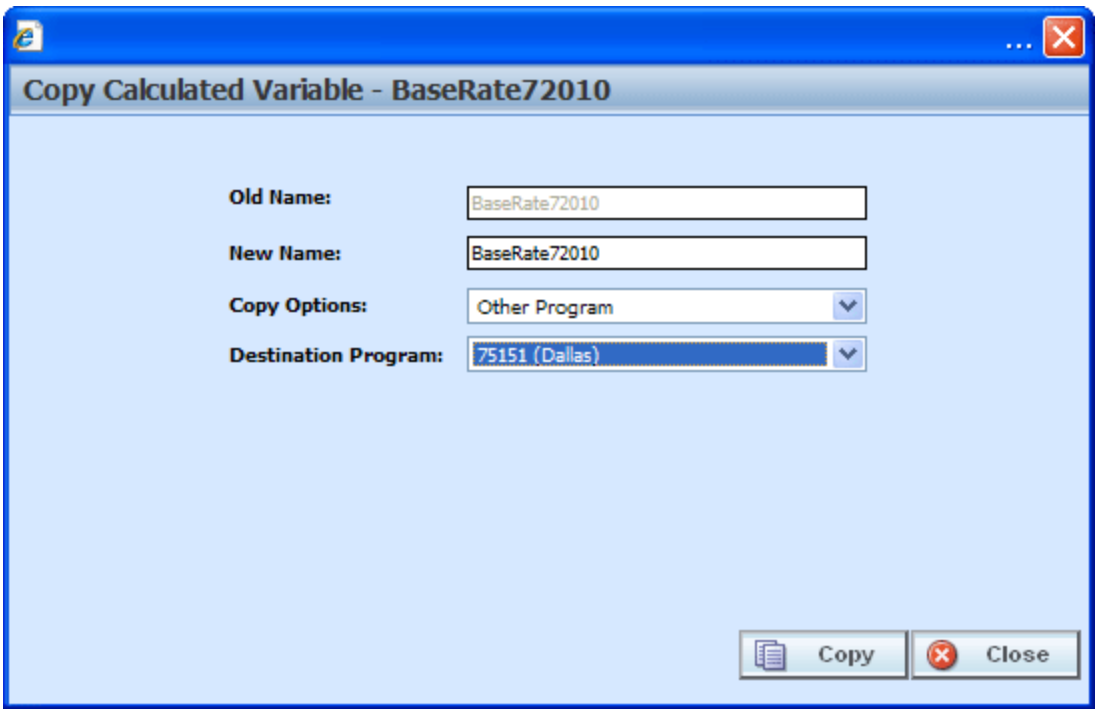


Figure 175 Copy Calculated Variable Popup

3. Enter in a **New Name**.

4. Select the **Copy Options**.

5. If you are copying a calculated variable within your default subline, you can select to copy the variable to another program within the same subline. Select the **Destination Program** from the drop down menu.
   If you are in a template generated subline, this option will be grayed out.

   If you are in a global table variable, this option will not be displayed.

6. Click **Copy** to copy the variable. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.

7. If the copy was successful, you will be returned to the previous screen. Your variable will have been copied. The last updated date will be the date the copy was made.

DELETING A VARIABLE

When a variable is no longer needed, it can either be left in RateManager or deleted. When you delete a variable, it gets deleted from all versions of the program. Also, all revisions of that variable get deleted. If you are uncertain as to whether the variable will be used again, simply leave it in RateManager. This will save time if the variable is needed and won't slow down rating.

To Delete a Variable

1. Select the variable you want to delete. Right click it and select **DELETE**.

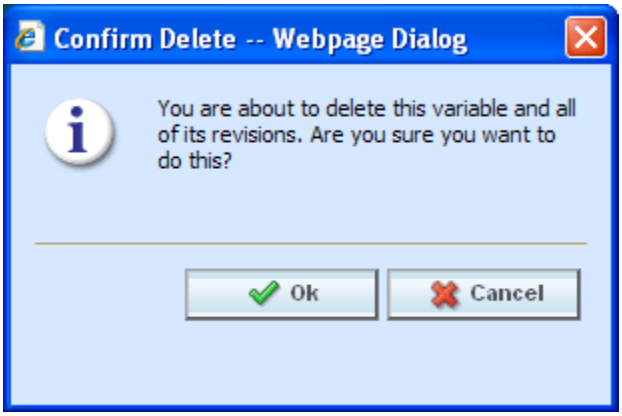


Figure 176 Deleting a Variable

2. You will be asked to confirm the deletion of the variable. Click **Ok** to delete the variable. Click **Cancel** to return to the tab without affecting a change.

If you try to delete a variable that is still being used by an algorithm, a result group or another variable, you will receive an error. Variables that are locked or that are template generated cannot be deleted.

NOTE: *Variables that are in use cannot be deleted.*

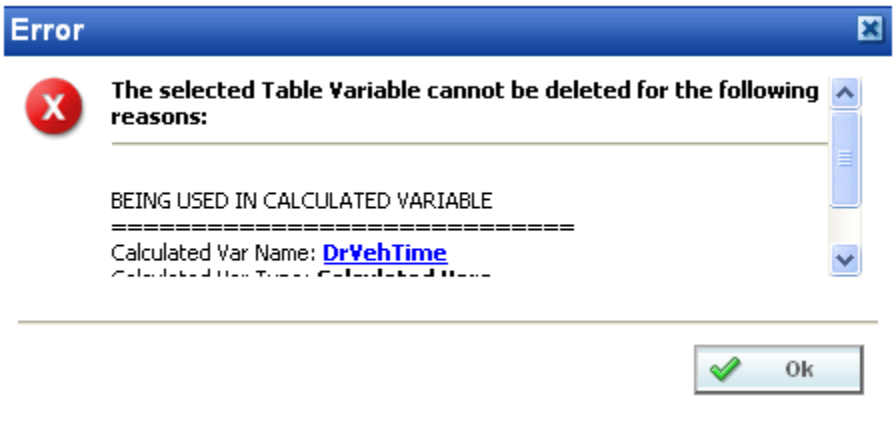


Figure 177 Error Message for Deleting a Variable

RESOLVING DEPENDENCIES

Dependencies may arise when you copy a variable, algorithm or driver assignment. Some dependencies may involve naming issues or may require you to create new variable. All dependencies will be listed. The options that you will have to choose from will not create further dependencies. For driver assignment, only available driver assignment functions will be shown.

The action column can contain three options:

- **Create**: This will create a new variable.
- **No-Action**: The variable in the Target Program Var field will be used.
- **Replace**: A new variable has been selected.

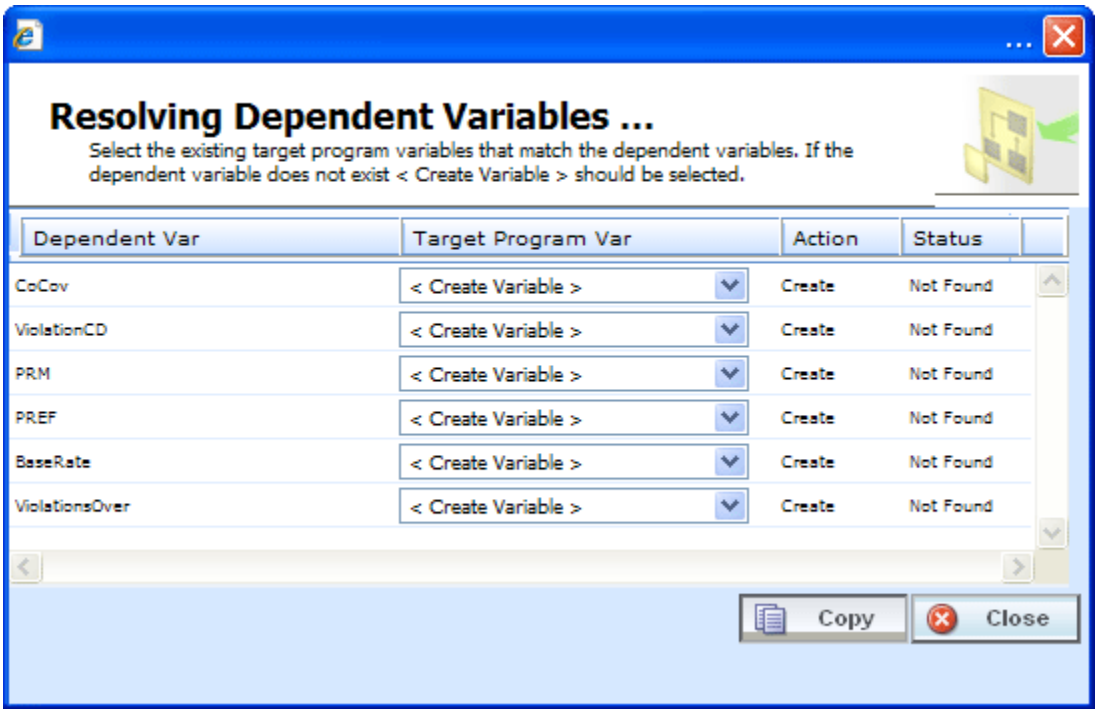


Figure 178 Resolving Dependent Variables

1. Select the **Target Program Var** you want from the menu. The menu will only contain one option if only one option can be taken.
2. Click **Copy**. The dependencies will be resolved and you will be returned to the previous screen. Your variable will have been copied. The last updated date will be the date the copy was made.

Chapter 16

ALGORITHMS

Algorithms in RateManager are similar to calculated variables in that they allow multiple steps to be used in determining a value. Algorithms are different, however, in that the user has the ability to sequence algorithms to run in the order desired. Variables are automatically sequenced by the system to run when needed. Algorithms are most commonly used in determining a premium or checking an underwriting condition. RateManager allows you to create two different kinds of algorithms, Rating Algorithms and Underwriting Algorithms.

- **Rating Algorithms** are mainly used for determining premiums, but with RateManager's ability to set the sequence in which the algorithms are run, they can be utilized to create a result for differences in limits being passed vs. rated, tier assignments, etc.

- **Underwriting Algorithms** are used to ensure underwriting rules have been met, prior to rating a policy, thus saving valuable execution time. Underwriting algorithms are flexible and can be implemented separately per tier or combined using a tiered structure. Messages can be set to output as a result, with or without the policy being set to fail on the rule. Underwriting can be designed to fail on the first rule or fail on all that may be applicable, allowing you to see all of the messages associated with that applicant.

There are differences in functionality between rating algorithms and underwriting algorithms.

- **Rating Algorithms** can have **advanced algorithm looping** added. This option will allow for a rating algorithm to be run a specified number of times until a condition is met. This option is not available in underwriting algorithms.

- **Underwriting algorithms** have one additional step type available; **Set Underwriting to Fail**. During run time, if the policy hits this step in the underwriting algorithm, rating will stop for that specific policy. The remainder of the current algorithm will be processed, but no other algorithms or premiums will be calculated.

  The advantage of using the **Set Underwriting to Fail** step is when there are some “hard and fast” underwriting rules that, if failed, will cause the policy to not be written under any circumstances. The user has the ability to have these underwriting rules run at the very beginning of the program. Thus, if the rule does fail, processing time is not wasted in calculating premiums for a policy that will not be written.

Global and Local Algorithms

Rating Algorithms and Underwriting Algorithms can be created and managed at the global level and at the local level. Global algorithms are like program level algorithms in the way they function and in the way they are created. In global algorithms you can create normal rating algorithms and underwriting algorithms, exactly like you can at the program level.

There are a couple of differences between globals and locals. One difference between them is that global algorithms are available to all programs within the subline while program level algorithms are available only to the program where they were created. Another is that Global algorithms can use only global elements. Local algorithms can use either local or global elements.

Global: Global algorithms are created and managed at the global level and are subline specific. Global algorithms can be accessed from the Global tab or from the Program Details tab. When selected, algorithms will be listed in the Folder Details area.

Local: Local algorithms are created and managed at the program version level and are specific to the program. Local algorithms can be accessed from the Program Details tab. When selected, algorithms will be listed in the Folder Details area.

Both global and local algorithms can be created by the user or brought in from a template. Algorithms that are user created will be open for editing, copying, creating new revisions and deletion if they are not locked.

Algorithms that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed but they can be copied. This is to ensure the integrity of the template. New algorithms can be added to a template and new revisions can be created. These new algorithms will be open for editing, copying, creating new revisions or deletion, unless the program version is locked.

Results from Algorithms

Algorithms should be used to set the value of result variables. Result variables are a special type of global variable that are available across the subline. Result variables can be used in local algorithms and in global algorithms. Result variables are typically premium totals and underwriting messages that are specified as output in the Result Mapping. Result variables are not instantiated, so if their value is not set by an algorithm, it will remain null. Two reasons to use algorithms set result variables include:

Example 1: Multiple result variables from a single algorithm

BI Premium can be set and Monthly BI Premium can be set, which would divide the BI Premium by Term Duration.

Example 2: Multiple algorithms setting a single result variable

BI Premium can be set by both Private Passenger BI Algorithm and Motorcycle BI Algorithm, depending on vehicle type.

Using “Results of Step” Logic to Create a Premium Algorithm

When calculating premiums, it is sometimes necessary to separate each calculation into individual steps. For example, refer to the following sample algorithm, as it might be shown in a manual:

Premium = Base Rate x Territory Factor x Limit Factor x Credit A x Credit B
** Round to 0 places after each step*

In RateManager, we would want to break this algorithm into several arithmetic steps so we can round properly.

Within an algorithm or calculated variable, we can use a **Results of Step** term to incrementally save the end calculation from a step in order to use it in subsequent steps. The result from the step is only available in the current algorithm and will be lost once the algorithm completes processing.

For example: All the **Results of Step** terms are highlighted.

Step 1*: Results of Step 1 = Base Rate x Territory Factor*
Step 2*: Results of Step 2 = Results of Step 1 x Limit Factor*
Step 3*: Results of Step 3 = Results of Step 2 x Credit A*

NOTE: *Results of Step variables are available in the available variables drop down list box under **Step Variables**.*

Algorithm Rules:

- The first step of a new algorithm is always an arithmetic step. If you do not want an arithmetic step as your first step, add the step type you do want as Step 2. You can then delete the automatic arithmetic step.
- You cannot have an algorithm without any steps. There will always be at least one step. You will not be able to delete the last remaining step.

ALGORITHM OPTIONS

The **Program Details tab** and the **Globals tab** shows all algorithms, either rating or underwriting, that have been created for a program. In addition, the revision number, type and working category of the algorithms will be displayed. From this tab you will be able to:

- Creating a new Algorithm
- Using an Advanced Algorithm Looping
- Editing an algorithm
- Copying an Algorithm
- Deleting an Algorithm
- Creating a new Algorithm Revision
- Changing the Active Revision of an Algorithm
- Deleting an Algorithm Revision

Navigating to Algorithms:

There are two paths to view and manage algorithms, either from the Globals tab or from the Program Details tab. The Global tab will display global algorithms only. You cannot view or manage local algorithms on the Global tab. On the Program Details tab, you can select to view either global algorithms or local algorithms. If you want to view and manage local algorithms, you must use the Program Details tab. The views and options are the same on either tab.

From either tab, when you select Algorithms in the Program Details Folder, the current algorithms will be listed in the Folder Details area.

Algorithms will not be an option on the Program Explorer tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.

2. Select the Line of Business→Subline→Folder→Program → Program Version. You also can access algorithms from the globals tab. Line of Business→Subline→Globals.

3. Open the program version to get the Program Details tab. Algorithms are available from the program details folders area on the left hand side of the tab.

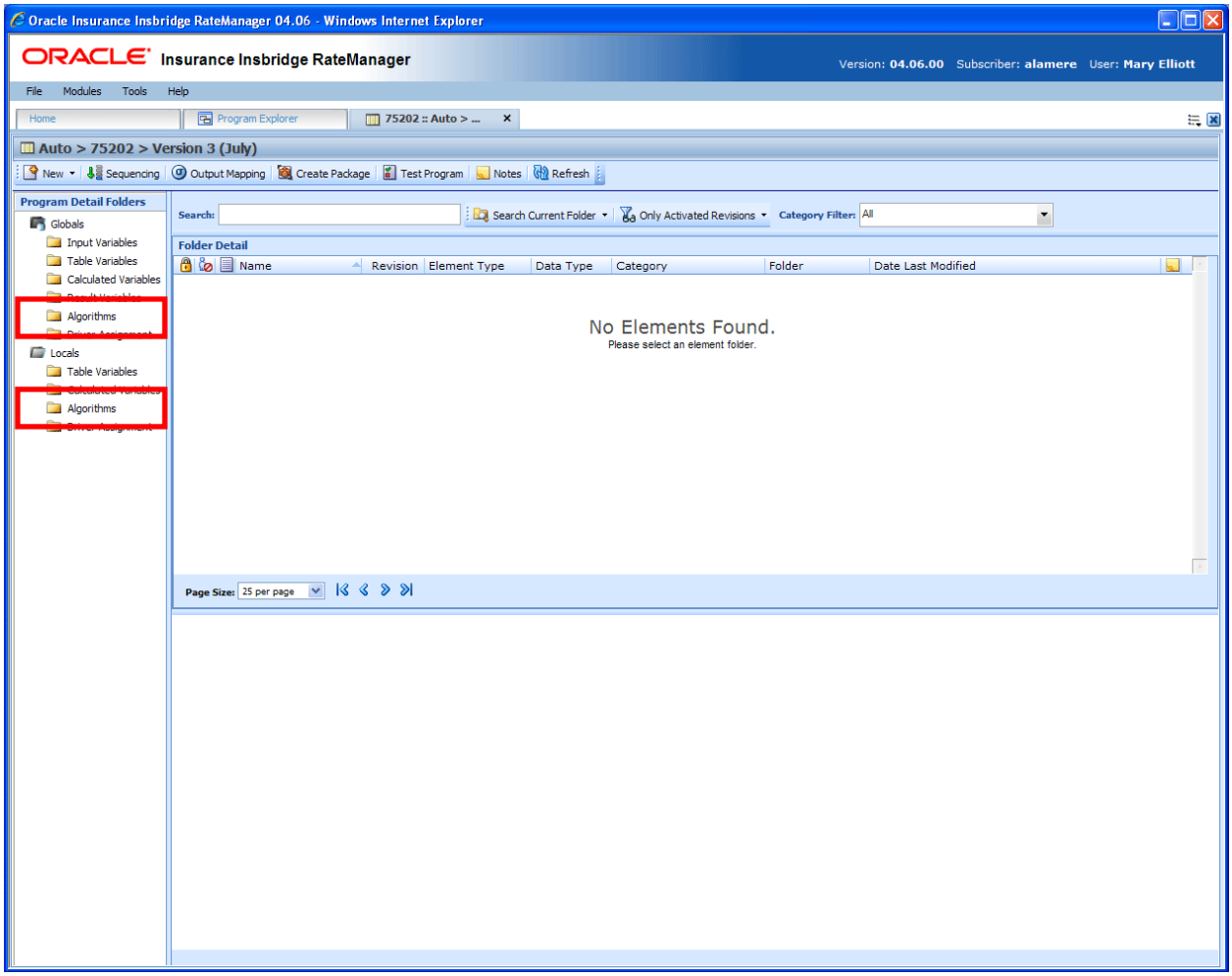


Figure 179 Algorithms Navigation

FUNCTIONALITY

Available functions can be accessed from the menu bar located at the top of the screen and from the right click menu of any unlocked algorithm.

- **Algorithm Functions:** The copy and delete functions can be performed on the Program Details tab using a right click menu. Reports also can be generated using the right click menu on the Program Details tab.
- **Algorithm Revision Functions:** You will be able to view, copy, and delete algorithm revisions. Active revisions can be set on the Program Details tab as well.
- **Algorithm Tab:** When you create a new algorithm, edit an existing algorithm, or work with revisions, you will be placed on the Algorithm tab.

Functions:

The functions you can perform will depend on the status of the algorithm. Locked algorithms will have fewer options. There are icons that can tell you at a glance what the status of the algorithm is.

Icon	What it Indicates
	Algorithm. Global Algorithms are subline specific and can be created at the global level, or from a program version. Local Algorithms are program specific and can be created at the program version level. Local Algorithms will be displayed on the Program Details→Local Algorithms. The same algorithm listing will also be available for Subline→Globals tab. The same options, new, edit, copy and delete are available on either tab.
	Locked Algorithm. Locked Algorithms are not open for editing. A lock icon indicates that this algorithm is locked by a program and is not open for copying, editing or deleting. If the algorithm is locked because the program is locked, you must return to the program and unlock it. This will unlock the algorithm and changes can be made.
	Template Lock. If the algorithm is locked because it came from a template, you will not be able to unlock the algorithm. You can create a new algorithm if necessary.
	In-Use. Algorithms that are in use are currently being worked on by another user in the system or algorithms that you have open in another tab are not open for editing, copying, or deleting. The algorithm will be available when the user exits the variable.
	Advanced Option. This algorithm has had advanced algorithm looping applied to it.
	Active Revision. This algorithm is the current active revision.

FIELDS

The fields are the same for the Global Tab and Program Details. For more on field descriptions, please see Program Details→Fields.

ALGORITHM TAB

The Algorithm tab will be available when you create a new algorithm, edit an existing algorithm, or work with revisions. You also can be placed directly on the Algorithm tab from one of the six *My Recently Opened Algorithms* snaps on your Home tab.

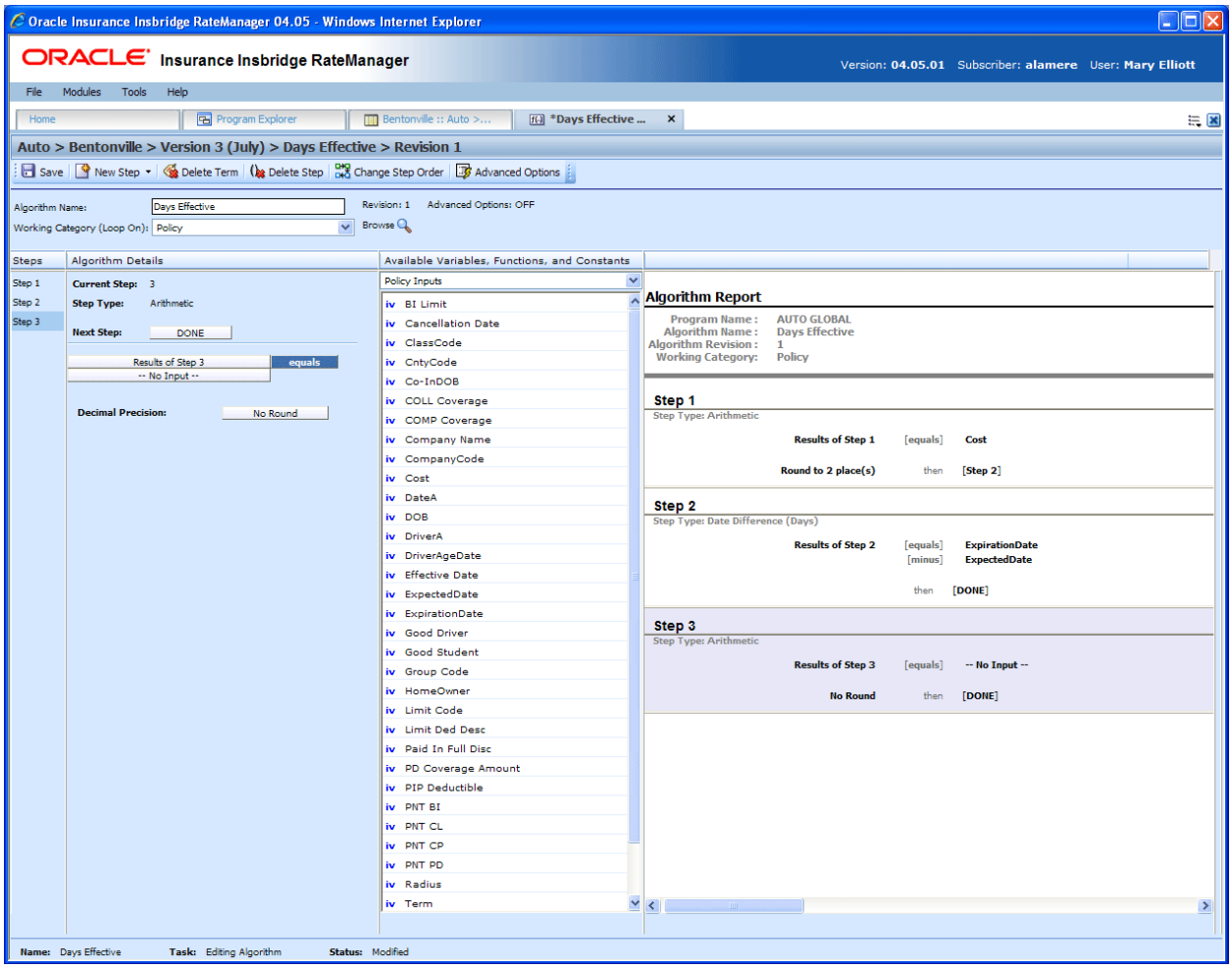


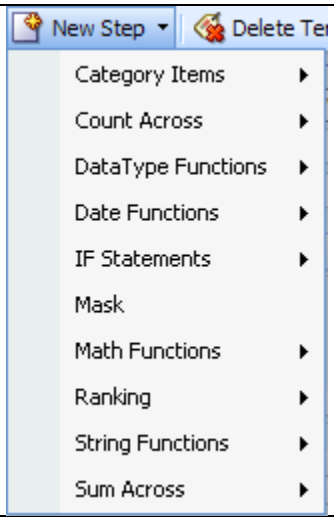
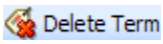
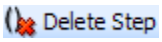
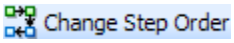
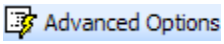
Figure 180 Algorithm Tab

FUNCTIONALITY

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

Functions:

Save	**Save:** Saves the algorithm.

	**New Step:** Creates a new step in the algorithm. For more information, see Working with Steps. **NOTE:** *Underwriting Algorithms will have a "Set Underwriting to Fail" step type in the list.*
	**Delete Term:** Deletes the currently selected term from a step in the algorithm.
	**Delete Step:** Deletes the currently selected step. You cannot delete the last step of an algorithm.
	**Change Step Order:** Allows users to change the order of the steps without using the drop and drag feature.
	**Advanced Options:** Opens up the advanced options screen.

FIELDS

There are four areas on the Algorithm Tab.

- **Algorithm Information:** The algorithm information area contains the name and defines the working category of the algorithm.
- **Algorithm Details:** The details area is where you enter the steps that the algorithm will perform.
- **Available Variables, Functions and Constants:** The list of the available variables, functions and constants that can be used in the Algorithm Details area.
- **Algorithm Report:** A listing of all the steps currently in the algorithm.

Algorithm Information

The algorithm information area is where you define the algorithm.

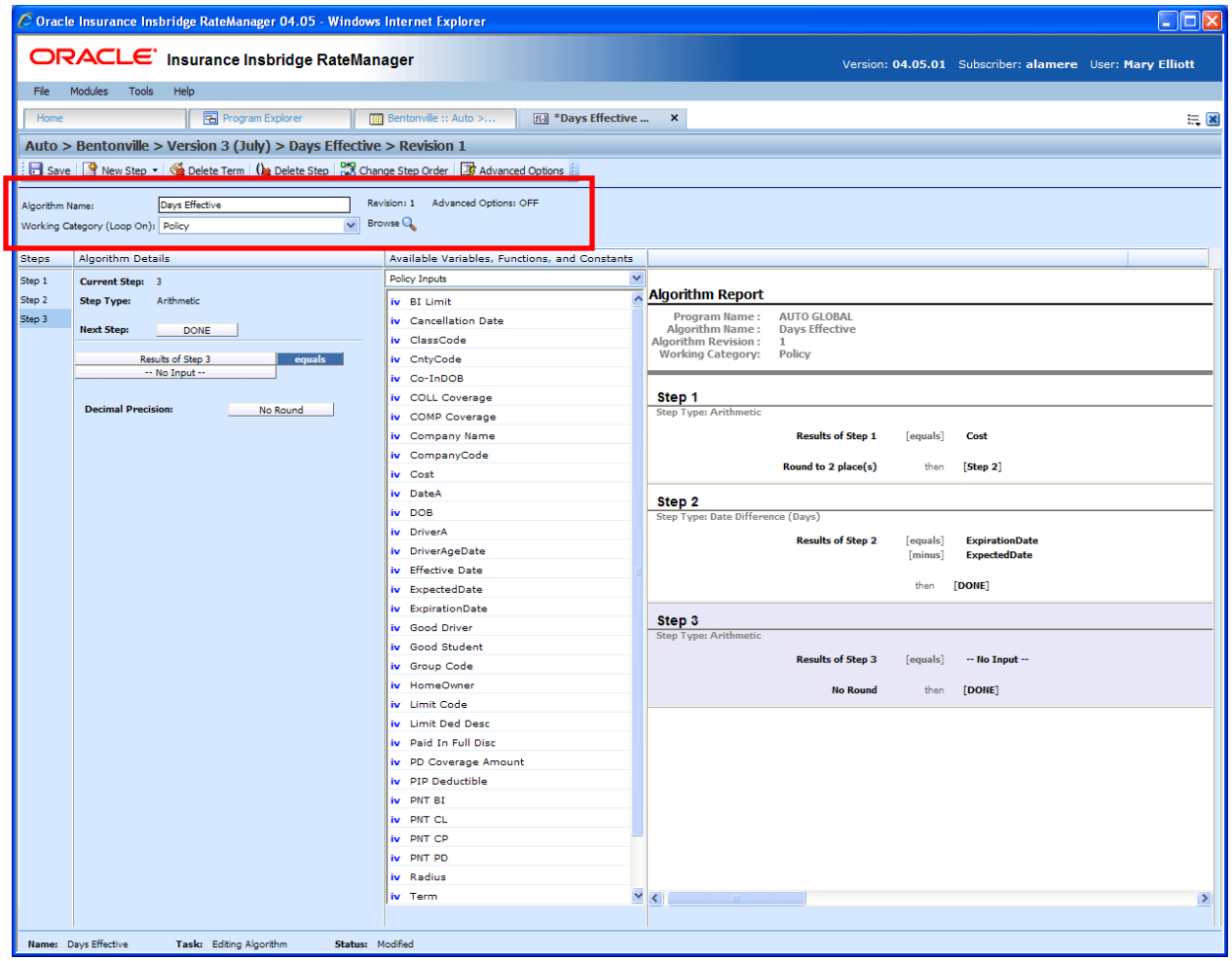


Figure 181 Algorithm Information Field

Fields

Algorithm Name: Entry for what you want the algorithm to be called. Alphanumeric characters are permitted, but no special characters (ex: &, *, ", +, @, etc) are allowed.

Working Category: Sets the category where the algorithm will be run. You can select the working category from the drop down menu or you can browse for a working category by clicking **BROWSE**. This will bring up the Browse Category popup. From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the working category section.

The Working Category determines the options displayed in the Available Algorithms area. For example, if you select Policy as the Working Category, then the menu choices in the Available Variables area will be Functions, Constants, Step Variables, Policy Inputs, Policy Variables and Policy Results.

Algorithm Details

This area contains the steps that the algorithm will perform.

A new algorithm always begins with an arithmetic step as **Step 1**. If you do not want an arithmetic step as your first step, add the desired step and then delete the arithmetic step. To do so, highlight **Step 1** and click **DELETE STEP** in the menu bar at the top of the tab.

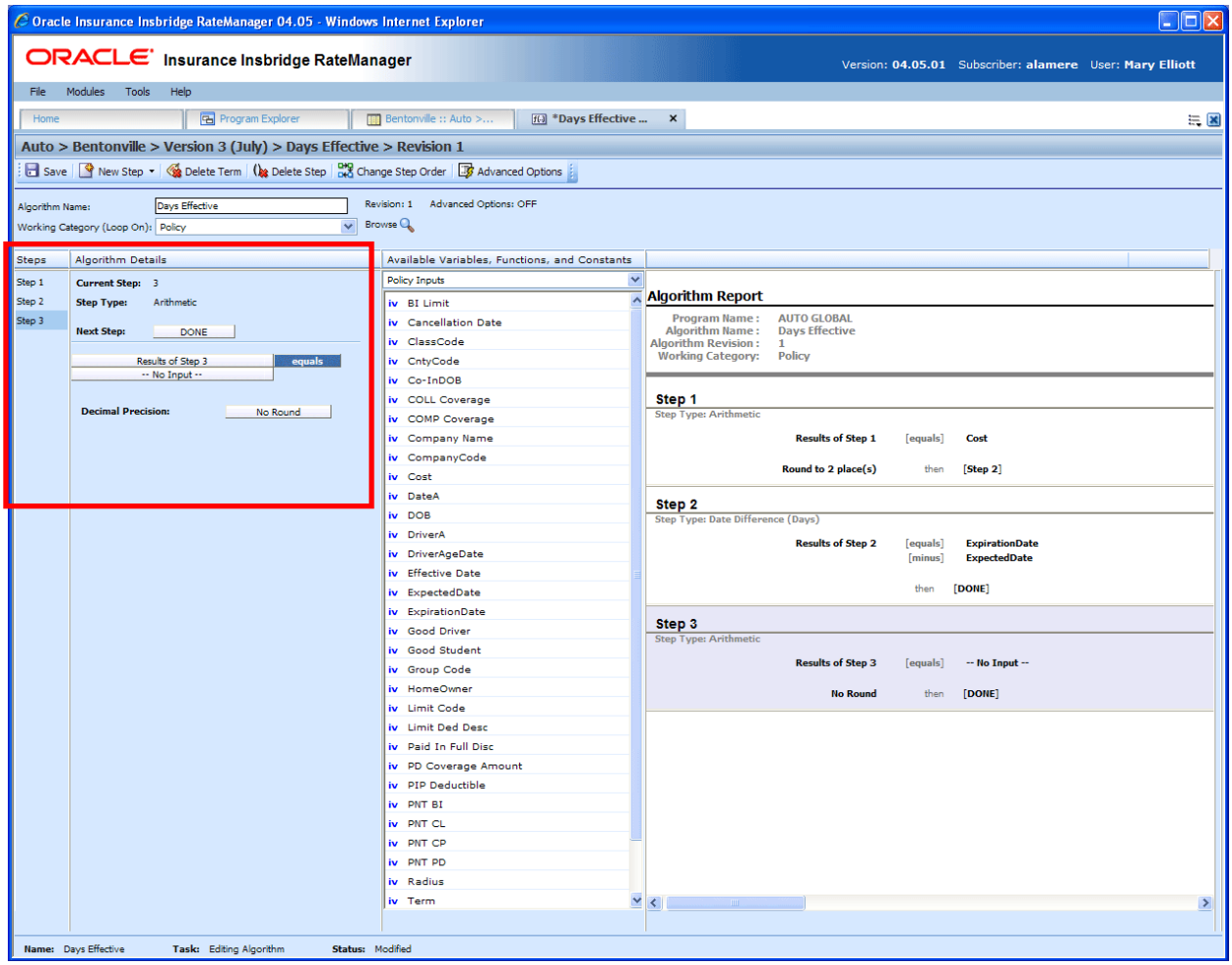


Figure 182 Algorithm Selection Criteria Field

Fields

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Algorithm Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set by clicking on the text box next to **Decimal Precision**. You can select a rounding precision from 0 to 9 digits.

Inputs and variables will have a right click menu available; View Report, View Where Used and Custom Value.

Available Variables, Functions and Constants

The Available Variables, Functions and Constants area contains a listing of available inputs, variables, and results, sorted by category and system constants that can be used as criteria. For global algorithms, only global variables or inputs may be used. You cannot use any local variables in the creation of a global algorithm. A globe icon is used to indicate a global algorithm.

For Inputs, you will be able to add a new input variable without leaving the Edit Algorithm tab. Scroll to the bottom of the Available Variables, Functions and Constants list and select <New Input Variable>. A popup will be displayed that will allow you to enter a new input variable.

You also will be able to add new a new result variable without leaving the Edit Algorithm tab.

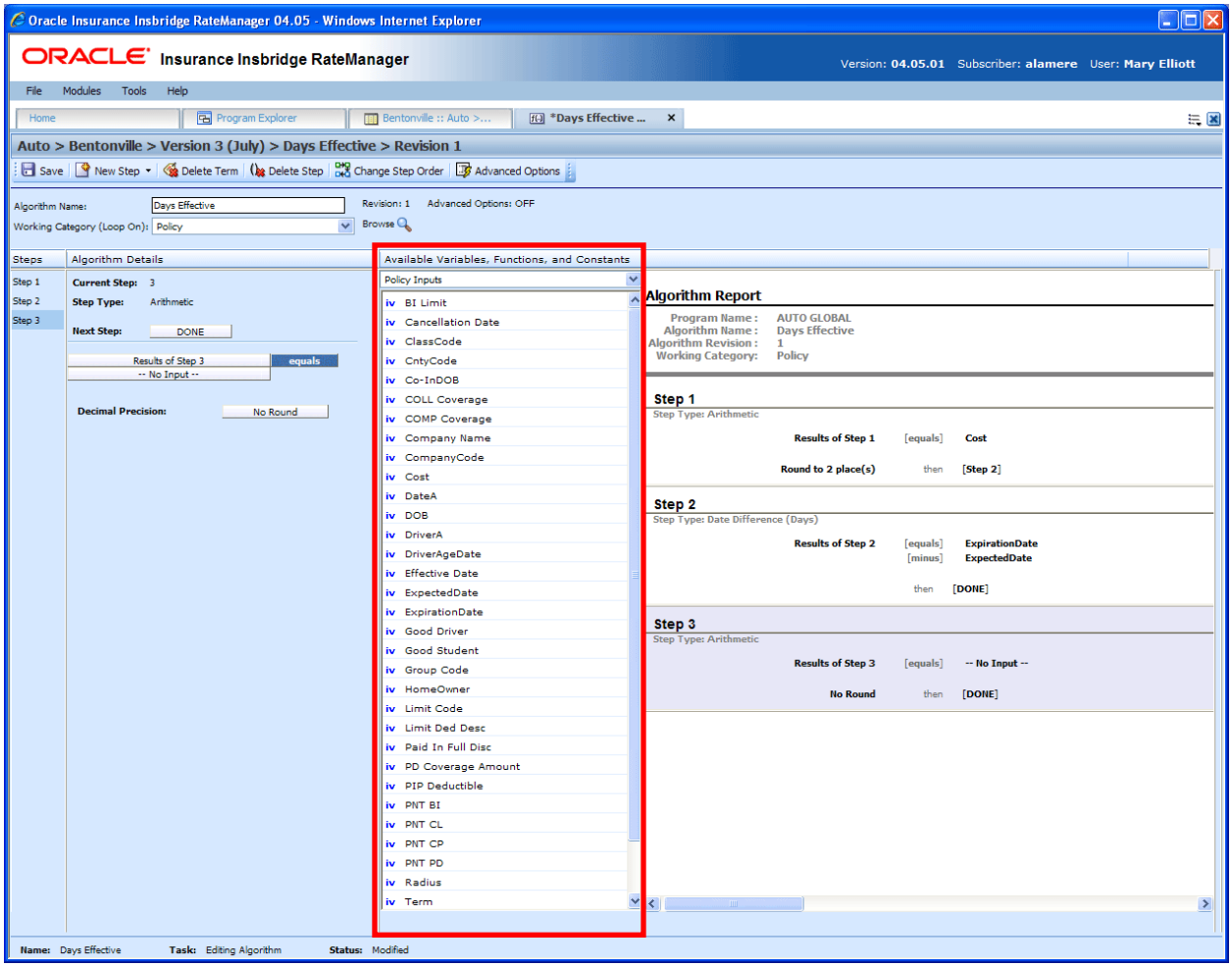


Figure 183 Available Variables, Function and Constants Field

Fields

Menu: The menu is the top most field. Click the down arrow to select the category you want. Policy variables will be available for all categories. Driver and Vehicle categories will be available in the Driver-Vehicle category. Categories are determined in the Algorithm Information area.

Selection: The available variables, functions, constants and step results will be listed. Variables will be based on the working category you select. Callouts are at the local level only.

Selection	Description
Functions: Program Callouts	Programs selected in the mapped callouts screen will be displayed.
Functions: Library Callouts	Libraries selected in the mapped callouts screen will be displayed.
Constants	Selection of system constants, category instances and system date and time. Or you can create a custom value for use in this program.
Step Variables	Results from the previously entered steps.
Policy Inputs	Inputs in the Policy category.
Policy Variables	Table and calculated variables in the Policy category.
Policy Results	Result variables in the Policy category.

Listing may also include other category inputs, variables and results.

Algorithm Report

This area contains a detailed list of the steps you have entered. This information is view only. No actions can be performed in this area.

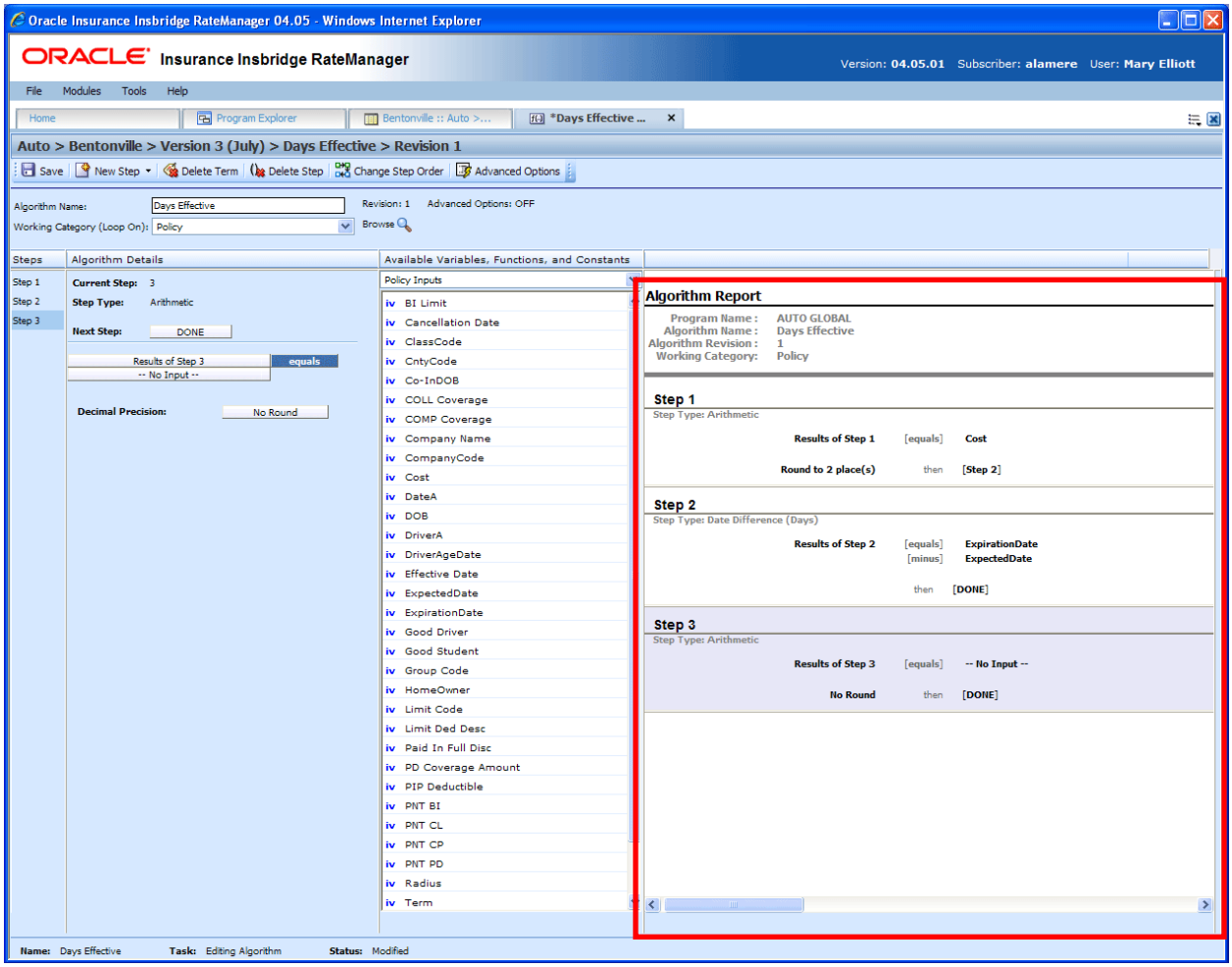


Figure 184 Algorithm Report

CREATING A NEW ALGORITHM

Algorithms can be created and added to standard programs and template generated programs. Local algorithms will be available in the program where you created it and can be copied to other programs within the subline. Global algorithms will be available across the subline.

Local and global algorithms are created and function in much the same way. One difference is that global algorithms can use only global table variables, inputs and result variables. Local algorithms can use both local and global elements. Another difference is that global algorithms can be created from the globals tab and from the program details tab.

To Create an Algorithm

1. On the Program Details tab of the program where you want to create a new algorithm, select either the Global Algorithms folder or the Local Algorithms folder.

2. Click **NEW** in the top bar menu. You then need to select to create a rating algorithm or an underwriting algorithm. If you do not want to select a folder, you can click NEW and select from there.

   NEW→Globals→Algorithm→Normal Rating
   NEW→Globals→Algorithm→Underwriting
   NEW→Locals→Algorithm→Normal Rating
   NEW→Locals→Algorithm→Underwriting

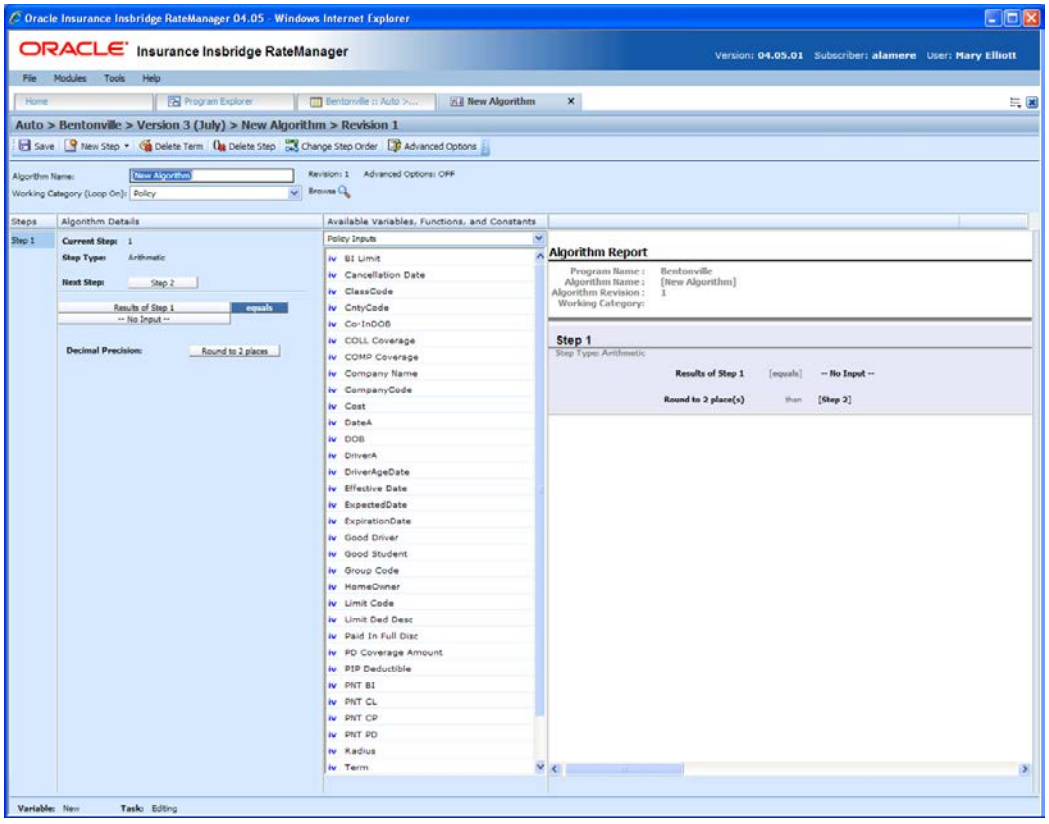


Figure 185 Creating a New Algorithm

3. This will open the Algorithm tab for the new algorithm where you can enter or select the variable elements you need.

4. Enter a **NAME** for the algorithm.

5. Choose a **WORKING CATEGORY**. You can select the working category from the drop down menu or you can browse for a working category by clicking **BROWSE**. This will bring up the Browse Category popup.

   From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the working category section.

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

NOTE: *Always save an algorithm after defining the name, and working category. The algorithm will not be available to be used within a step until the algorithm has been saved.*

6. The first step will be populated in the Algorithm Details area. This must be a mathematical step. If you do not want an arithmetic step as your first step, add the desired step and then delete the arithmetic step. To do so, highlight **Step 1** and click **DELETE STEP** in the menu bar at the top of the tab.

7. To add a new step to the algorithm, click **NEW STEP** and select the type of step you want to add. The screen will refresh with the new step parameters. Depending upon the step type, you will have to select the appropriate variables, functions, constants or inputs. The value you need to select will be listed on the step.

   For example, if the step has an “Enter Variable” box, you must choose the variable type from the menu in the Available Variables, Functions and Constants area. The options will be populated underneath. Click the “Enter Variable” box and then double-click the corresponding variable you want. The box will refresh with your selected value. For more information on the types of steps, see Working with Steps.

NOTE: *For callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made. Callouts are program version specific and will be available in local algorithms and driver assignments only.*

8. Continue entering steps until complete. When you are finished making your entries, click **Save**.

Adding an Input Variable, a Result Variable or a Custom Value Constant

A new input variable, result variable or custom value constant can be created while entering or editing an algorithm, without leaving the Edit screen.

- To add an **Input Variable**: See Adding a New Input from Another Area
- To add a **Custom Value Constant**: See Constants
- To add a **Result Variable**: See Adding a Result Variable from Another Area

Using an Advanced Option

The advanced options screen is where you can activate Advanced Algorithm Looping. This option will allow an algorithm (and all of its steps) to be processed 1 or more times on a given category instance. Processing will execute until the Do While conditional expression is not met or a Maximum Number of Loops has been executed. The Maximum Number of Loops is required to prevent an infinite loop from occurring. The default number of loops is zero (0).

You can add multiple Do While conditions. The maximum number of loops that the system will allow is 5,000. Be aware that this number may be decreased by your system administrator. You must check the TURN ON ADVANCED LOOPING box and enter a maximum number of loops if you want looping to occur.

NOTE: *Selecting EXIT LOOP as a Next Step will exit the algorithm after the step is finished and prevent any further iterations of the algorithm from executing on any other categories instances at the same level (working category).*

Advanced Algorithm Looping can be turned ON or OFF only on the Algorithm Advanced Options screen. When you turn the algorithm loop off, you will be asked if you want to clear the looping condition. If you answer yes, the screen will clear. Advanced Algorithm Looping is available on normal rating algorithms only.

Algorithm Looping is typically used in conjunction with Program to Program (P2P) or Program to Library (P2L) Callouts.

To Add an Algorithm Loop to a Rating Algorithm

An Algorithm Loop can be added at any time and on any step in the algorithm. It will not be a step type. Looping applies to the entire algorithm.

Advanced Options cannot be added to a new algorithm until you save your algorithm.

1. Create a new algorithm or navigate to the **Edit Algorithm** screen for the program that contains the algorithm where you want loop to occur.

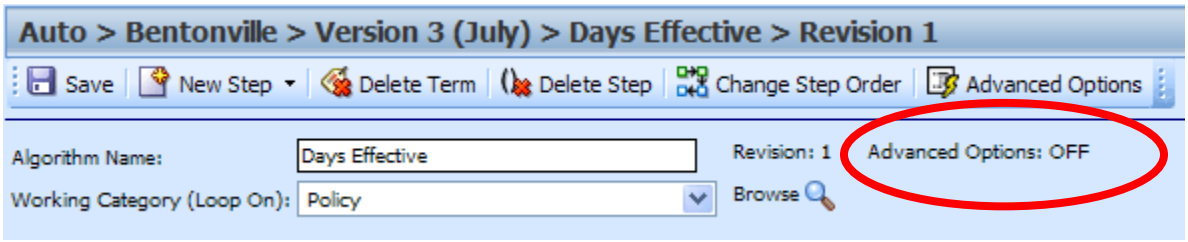


Figure 186 Adding an Advanced Option to a Rating Algorithm

2. Click **Advanced Options**. This will open the **Algorithm Advanced Options** screen.

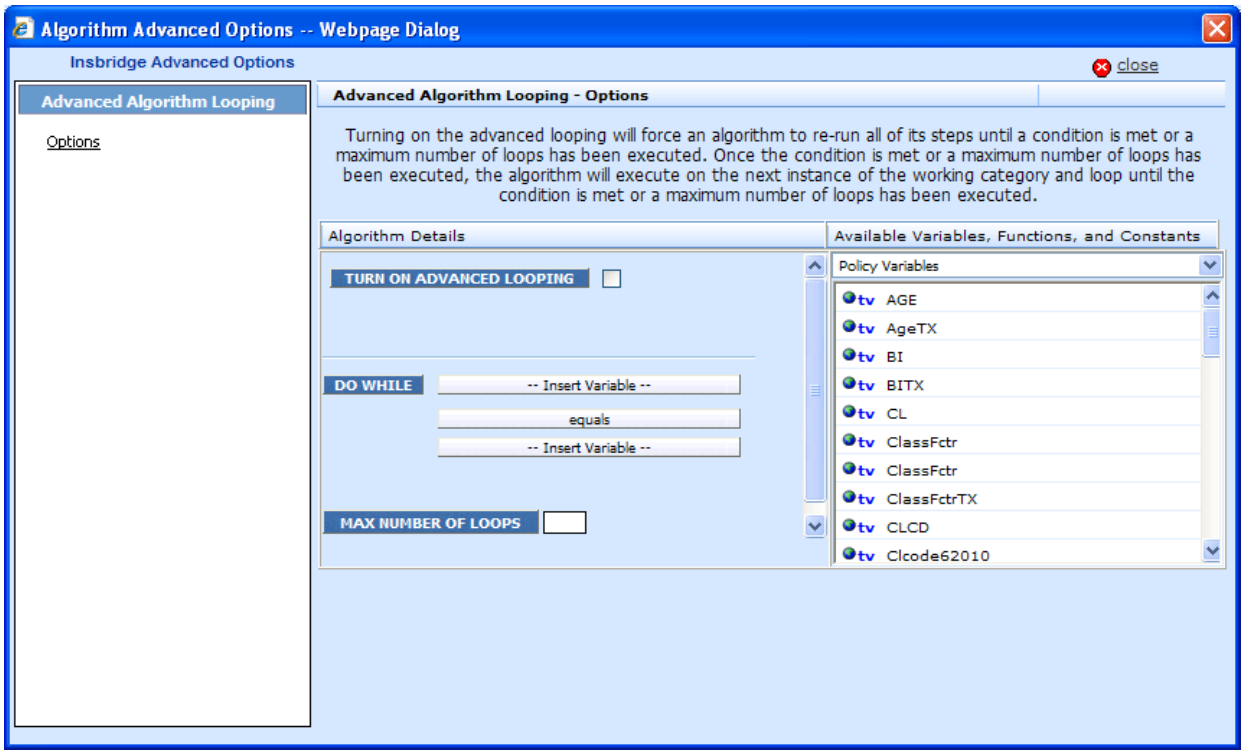


Figure 187 Algorithm Advanced Options

3. Check the **TURN ON ADVANCED LOOPING** box. This will turn on the algorithm looping.
4. The **DO WHILE** section is where you will select the conditions of the loop. The first variable must be a result or input variable. Select the **first variable**.
5. Equal is the default operator. If you need a different **operator**, select it.
6. The second variable can be any variable at the same working category or parent category. The second variable can also be a constant. Select the second **variable**.
7. Enter in the **maximum number of loops** you want to perform. The default is zero (0).
8. Click **Close** to close the screen.

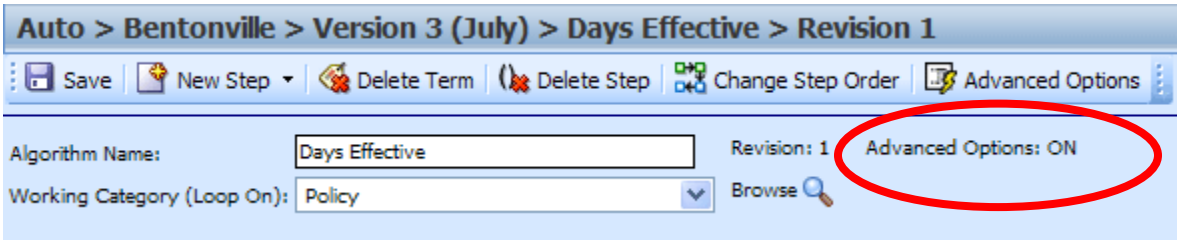


Figure 188 Advanced Options ON

9. On the Algorithm Edit screen, the Advanced Options will show **ON**.
10. Click **Save** to save your work.

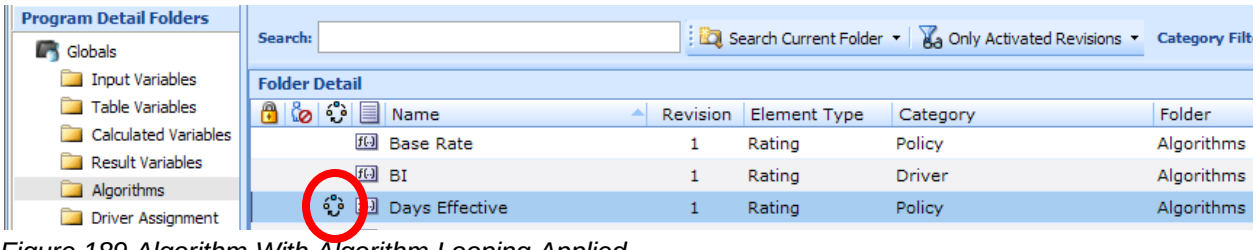


Figure 189 Algorithm With Algorithm Looping Applied

11. On the Program Details tab, the Advance Options Icon will be displayed on the algorithm.

EDITING AN ALGORITHM

The Edit Algorithm tab is where you can change algorithm information such as name, working category and steps. Algorithms that are grayed out or locked cannot be edited. Template generated algorithms that are using revision 1 are not open for editing. If you want to edit a template generated algorithm, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed. Global algorithms can be edited from the globals tab or from the program details tab.

NOTE: *If a change is made to a global algorithm, the change affects all programs that use the global algorithm. If a change only needs to be made to one particular program, create a local algorithm in the program and have the program reference the local algorithm instead of the global.*

To Edit an Algorithm

1. On the Program Details tab, select the **Algorithm** you want to edit.
2. Double click or right click and select **EDIT**. The Edit Algorithm tab will open with the details of the algorithm.
3. Make any changes.

   To change the step order, you have two options:

   - **Option 1:** Select a step in the Steps column, drag it to a new location in the list and drop it.
   - **Option 2:** Select the step you want to move and click CHANGE STEP ORDER. A separate screen will be displayed.
     - The current step position will be displayed at the top of the screen. Select where you want the step to be placed.
     - Click OK. You will be returned to the Edit Algorithm tab. Your step should be placed where you chose.

   To delete a step, select the step in the Steps column and then click DELETE STEP. You cannot delete the last step from an algorithm.

4. Click **SAVE** to save your work.

COPYING AN ALGORITHM

Any algorithm may be copied at any time. In your default subline, local algorithms may be copied to any program within the subline. Global algorithms can be copied within the same subline. Template generated programs will allow you to copy algorithms only within the same program. Any copied algorithm will be open for editing. To make a change to the algorithm, you must go into the edit tab.

When copying an algorithm, the structure of the algorithm (including the working category and steps) is copied. Only the active revision is copied. If you have an algorithm with 10 revisions, and you copy the algorithm, only the active revision will be copied into the new algorithm. The other 9 revisions will not be copied.

For Local Algorithms, there are two copy options:

- **Existing Program:** Copy the algorithm into the existing program under another name.
- **Other Program:** Copy the algorithm into another program within the same subline. This option is for algorithms within your default subline.

Global algorithms can be copied from the globals tab or from the program details tab. Unlike a program level algorithm, you will not be able to select copy options.

To Copy an Algorithm

1. Select the algorithm you would like to copy and right click it. Select **Copy** from the popup menu.

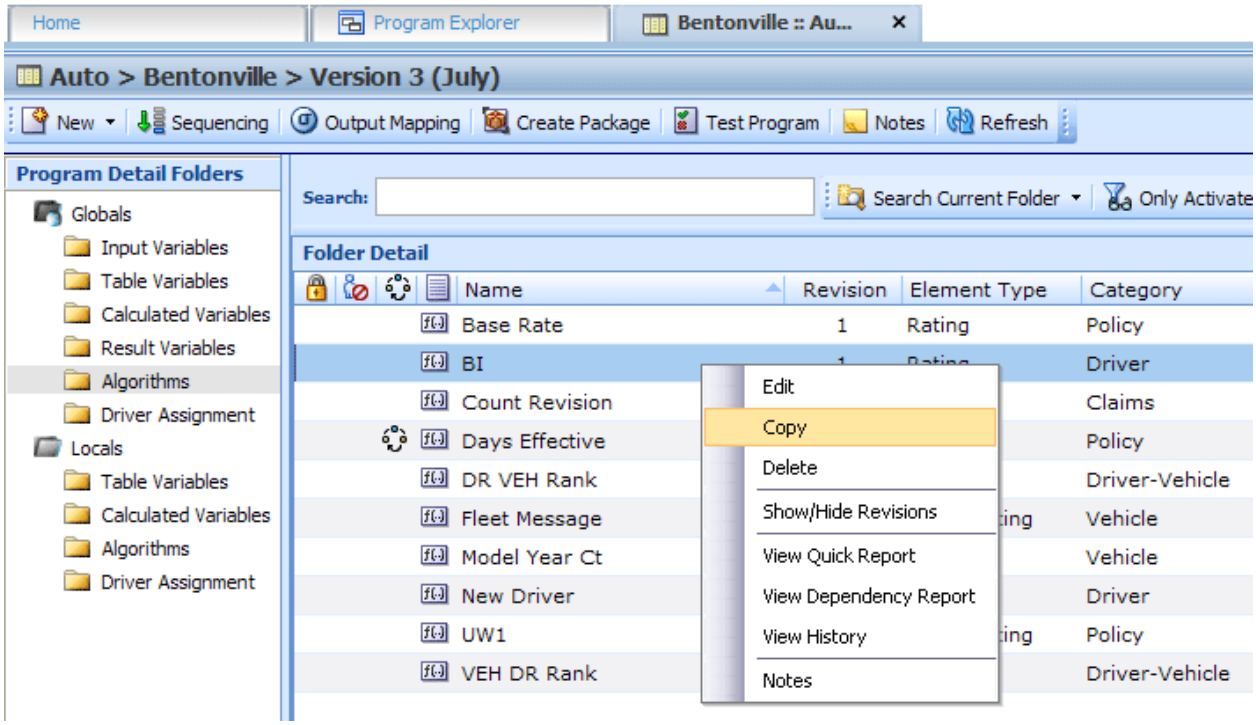


Figure 190 Copy Algorithm Menu

2. A separate popup window will be displayed.

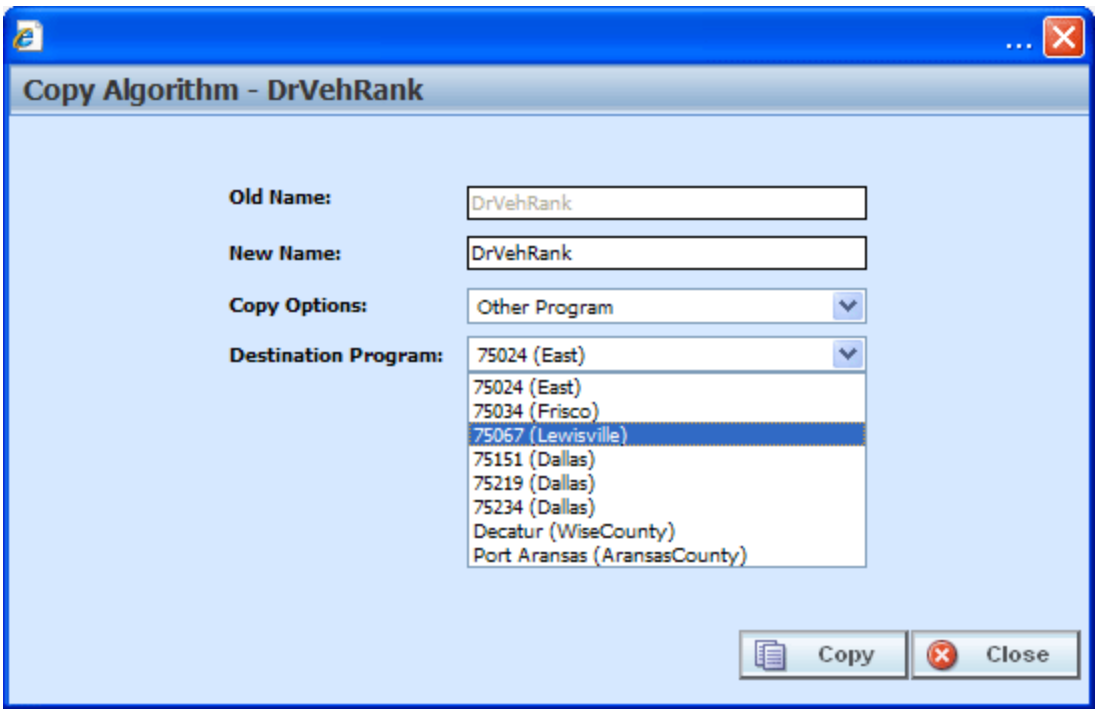


Figure 191 Copy Algorithm Popup

3. Enter in a **New Name**.
4. Select the **Copy Options**.
5. If you are copying an algorithm within your default subline, you can select to copy the algorithm to another program within the same subline. Select the **Destination Program** from the drop down menu.
6. Click **Copy** to copy the algorithm. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.
7. If the copy was successful, you will be returned to the previous screen. Your algorithm will have been copied. The last updated date will be the date the copy was made.

DELETING AN ALGORITHM

When an algorithm is no longer needed, it can either be left in RateManager or deleted. When you delete an algorithm:

- The algorithm gets deleted from all versions of the program.
- All revisions of that algorithm get deleted as well.

If you are uncertain as to whether the algorithm will be used again, leave it in RateManager. This will save time if the algorithm is needed again and leaving it in RateManager will not slow down rating.
If you try to delete an algorithm that is still being used by a result group or another algorithm, you will receive an error. Algorithms that are locked or that are template generated cannot be deleted.

NOTE: *Algorithms that are in use cannot be deleted.*

Any unlocked global algorithm that is not in use can be deleted. Global algorithms that are in use, locked, or template generated cannot be deleted. If you try to delete a global algorithm that is unavailable for deletion, an error message will be displayed informing you where the global algorithm is being used. Locked and template generated algorithms will be grayed out.

A lock icon indicates that this algorithm is locked by either a program or a template and is not open for editing or deleting.

Global algorithms can be deleted from the globals tab or from the program details tab.

To Delete an Algorithm

1. Navigate to the **Program Details tab** for the program that contains the algorithm you want to delete.

2. Select the algorithm you want to delete and right click. Select **DELETE** from the popup menu.

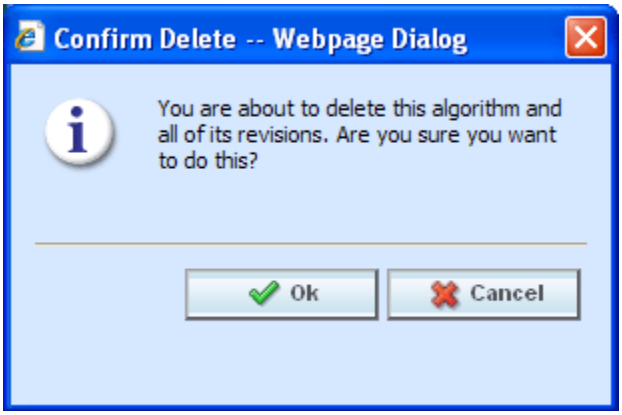


Figure 192 Deleting an Algorithm

3. You will be asked to confirm the deletion of the algorithm. Select **Ok** to delete the algorithm and refresh the list of algorithms. Select **Cancel** to return to the Program Details tab.

NOTE: *If you try to delete an algorithm that is still being used in Sequencing by any program version, you will receive an error message telling you where the algorithm is being used.*

Chapter 17

DRIVER ASSIGNMENT

Driver assignment is an auto insurance specific method of assigning a specific driver to a specific vehicle on a policy, based on certain criteria. The Driver Assignment option is available in the Auto LOB only. No other line will have this option. Criteria often differ by carrier basis and sometimes even by program level.

There are two kinds of driver assignments:

- **Scenarios**: Created under the DA scenario option using *vehicle usage options*. Vehicle usage options are specific usage sets within RateManager that allow you to build a sequence of events within a defined scenario to obtain a desired result. See Vehicle Usage Options for detailed explanations. You will not be able to use categories in a scenario. There are four vehicle usage options that you can use:
  - Vehicle Usage by Vehicle Order (Input:299)
  - Vehicle Usage on Drivers
  - Driver Usage on Vehicle
  - Vehicle Usage by Vehicle ID (Input:299/368)
- **Algorithms**: These algorithms work exactly the same way as any other algorithm in RateManager and allow you to create a set of rules to be executed in sequence that will obtain a desired result. Algorithms use categories and not vehicle usage options. There are four algorithm options:
  - Flag Driver
  - Flag Vehicle
  - Rank Driver
  - Rank Vehicle

Global and Local Driver Assignments

Driver Assignment Scenarios and Driver Assignment Algorithms can be created and managed at the global level and at the local level. Global driver assignments are like program level driver assignments in the way they function and in the way they are created. In global driver assignments, you can create driver assignment scenarios and algorithms, exactly like you can at the program level. Global driver assignments are available only to programs in the auto line of business, same as the program level.

There are a couple of differences between globals and locals. One difference between them is that global driver assignments are available to all programs within the subline while program level driver assignments are available only to the program where they were created. Another is that Global driver assignments can use only global elements. Local driver assignments can use either local or global elements.

Global: Global driver assignments are created and managed at the global level and are subline specific. Global driver assignments can be accessed from the Global tab or from the Program Details tab. When selected, driver assignments will be listed in the Folder Details area.

Local: Local driver assignments are created and managed at the program version level and are specific to the program. Local driver assignments can be accessed from the Program Details tab. When selected, driver assignments will be listed in the Folder Details area.

Both global and local driver assignments can be created by the user or brought in from a template. driver assignments that are user created will be open for editing, copying, creating new revisions and deletion if they are not locked.

Driver assignments that were brought in from a template will be locked at all times and cannot be unlocked. No editing or deleting will be allowed but they can be copied. This is to ensure the integrity of the template. New driver assignments can be added to a template and new revisions can be created. These new driver assignments will be open for editing, copying, creating new revisions or deletion, unless the program version is locked.

Separating Driver and Vehicle Output (Auto LOB Only)

By default, once Driver-Assignment is complete, there are no longer drivers and vehicles there are only driver-vehicle pairs.

The advantages to this are:

1. You can use driver and vehicle level elements (inputs, variables and results) inside of variables and algorithms, without having to specify which driver or vehicle to use.

   For example, if you have a class factor that depends on the assigned driver's age, as well as the vehicles use code, you would set up the class factor as a driver-level variable. SoftRater would then automatically use the correct driver and vehicle information.

2. The result XML will show all drivers, vehicle and driver-vehicle elements together. For example, if you output the driver age, it would show up under the vehicle that driver is assigned to.

The disadvantage is that once Driver-Assignment is complete, you can no longer use any elements for drivers that did not get assigned to a vehicle. For example, if driver 3 has 3 points, but did not get assigned to a vehicle, then after Driver-Assignment, those 3 points will no longer be available. While it is possible to account for those 3 points before Driver-Assignment, it often gets messy and difficult to maintain.

To remedy this, RateManager allows the user to instruct SoftRater to separate the driver and vehicle elements, while keeping the association between them. This keeps the first advantage shown above and fixes the disadvantage. However, in doing this, the driver and vehicle elements no longer show together on the result XML. Since they do not show together, the user has no way of knowing which driver got assigned to which vehicle, unless additional information is returned. You can return that additional information by following the steps below.

How to Identify the Vehicle a Driver is Assigned to and Vice Versa

1. Start by creating result variables to hold the information. You will probably want the following results:

Result Variable Name	Working Category	Type	Description
Assigned Vehicle Number	Driver	Integer	Holds the number of the vehicle that the current driver was assigned to
Assigned Driver Number	Vehicle	String	Holds the number of the driver that was assigned to the current vehicle

2. Next, create an algorithm to set the result variables.

Algorithm Name	Working Category	Description
Get Assignment Information	Driver-Vehicle	Sets the result variables Assigned Vehicle Number and Assigned Driver Number

Step Number	Type	Step
Step 1	Arithmetic	Assigned Vehicle Number (driver result) = VehicleID (vehicle input)
Step 2	String Addition	Assigned Driver Number (vehicle result) = DriverID (driver input)

3. Finally, add the new algorithm to the Sequencing, after the Driver-Assignment scenario.

Order	Name
1	abc
2	def
…	…
n	Driver Assignment
n + 1	Get Assignment Information
…	…

DRIVER ASSIGNMENT OPTIONS

The **Program Details tab** and the **Globals tab** will both display all driver assignment scenarios, flag driver, flag vehicle, rank driver and rank vehicle algorithms that have been created at the respective level. In addition, the revision number, data type and working category of the scenarios and algorithms will be displayed. From this tab you will be able to:

- Creating a new Driver Assignment
- Editing an Driver Assignment
- Copying an Driver Assignment
- Deleting an Driver Assignment
- Creating a new Driver Assignment Revision
- Changing the Active Revision of an Driver Assignment
- Deleting an Driver Assignment Revision

Navigating to Driver Assignments:

There are two paths to view and manage driver assignments, either from the Globals tab or from the Program Details tab. The Global tab will display global driver assignments only. You cannot view or manage local driver assignments on the Global tab. On the Program Details tab, you can select to view either global driver assignments or local driver assignments. If you want to view and manage local driver assignments, you must use the Program Details tab. The views and options are the same on either tab.

From either tab, when you select Driver Assignments in the Program Details Folder, the current driver assignments will be listed in the Folder Details area.

Driver Assignments will not be an option on the Program Explorer tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.

2. Select the Line of Business→Subline→Folder→Program → Program Version. You also can access driver assignments from the globals tab. Line of Business→Subline→Globals.

3. Open the program version to get the Program Details tab. Driver assignments are available from the program details folders area on the left hand side of the tab.

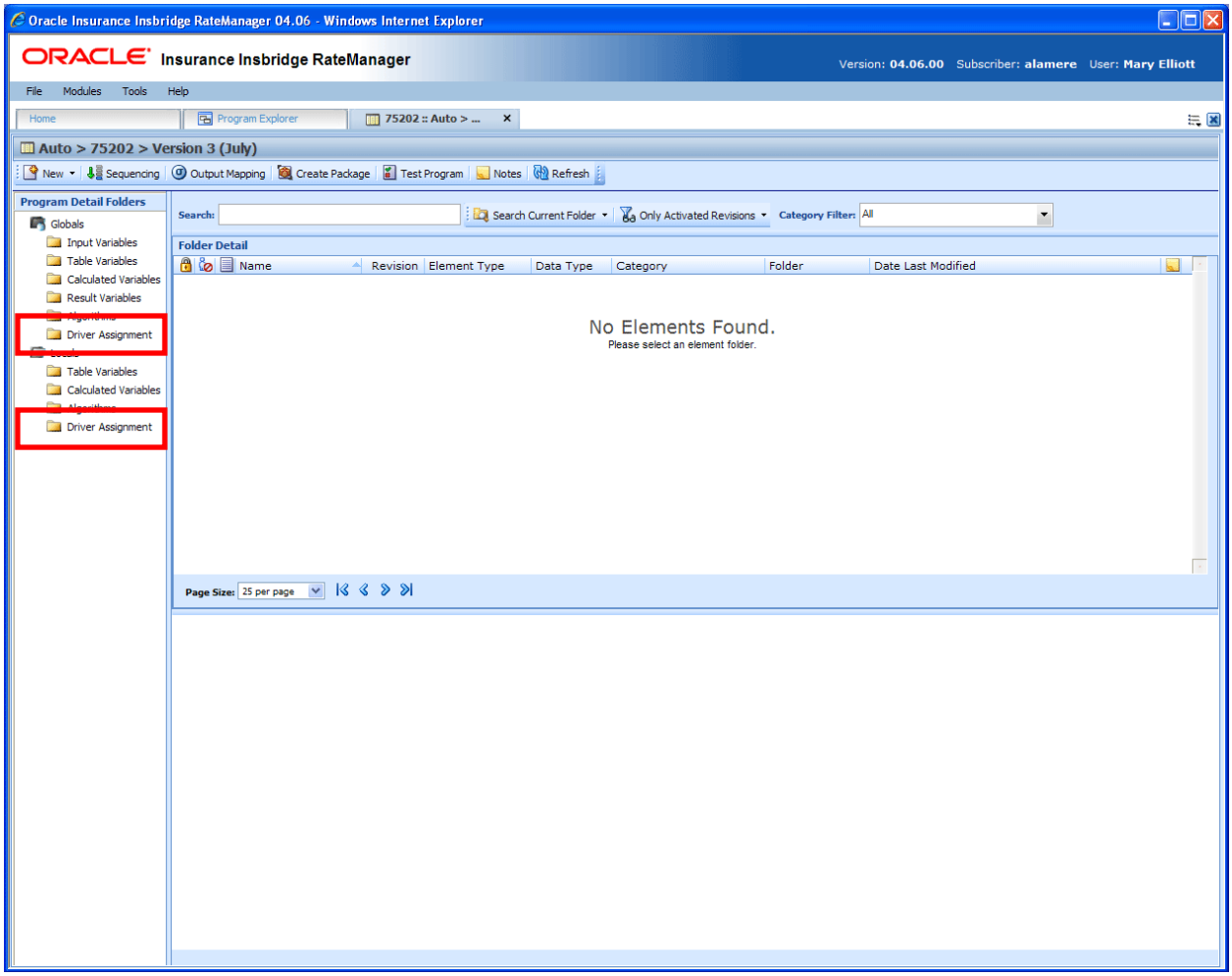


Figure 193 Driver Assignment Navigation

FUNCTIONALITY

Available functions can be accessed from the menu bar located at the top of the screen and from the right click menu of any unlocked driver assignment.

- **Driver Assignment Functions:** The copy and delete functions can be performed on the Program Details tab using a right click menu. Reports also can be generated using the right click menu on the Program Details tab.
- **Driver Assignment Revision Functions:** You will be able to view, copy, and delete driver assignment revisions. Active revisions can be set on the Program Details tab as well.
- **Driver Assignment Tab:** When you create a new driver assignment, edit an existing driver assignment, or work with revisions, you will be placed on the Driver Assignment tab.

Functions:

The functions you can perform will depend on the status of the driver assignment. Locked driver assignments will have fewer options. There are icons that can tell you at a glance what the status of the driver assignment is.

Icon	What it Indicates
	Driver Assignment. Global Driver Assignments are subline specific and can be created at the global level, or from a program version. Local Driver Assignments are program specific and can be created at the program version level. Local Driver Assignments will be displayed on the Program Details→Local Driver Assignments. The same driver assignments listing will also be available for Subline→Globals tab. The same options, new, edit, copy and delete are available on either tab.
	Locked Driver Assignment. Locked Driver Assignments are not open for editing. A lock icon indicates that this driver assignment is locked by a program and is not open for copying, editing or deleting. If the driver assignment is locked because the program is locked, you must return to the program and unlock it. This will unlock the driver assignment and changes can be made.
	Template Lock. If the driver assignment is locked because it came from a template, you will not be able to unlock the driver assignment. You can create a new driver assignment if necessary.
	In-Use. Driver Assignments that are in use are currently being worked on by another user in the system or driver assignments that you have open in another tab are not open for editing, copying, or deleting. The driver assignment will be available when the user exits the variable.
	Active Revision. This driver assignment is the current active revision.

FIELDS

The fields are the same for the Global Tab and Program Details. For more on field descriptions, please see Program Details→Fields.

DRIVER ASSIGNMENT TAB

The Driver Assignment tab will be available when you create a new driver assignment, edit an existing driver assignment, or work with revisions. You also can be placed directly on the Driver Assignments tab from the *My Recently Opened DA Scenarios* snap on your Home tab.

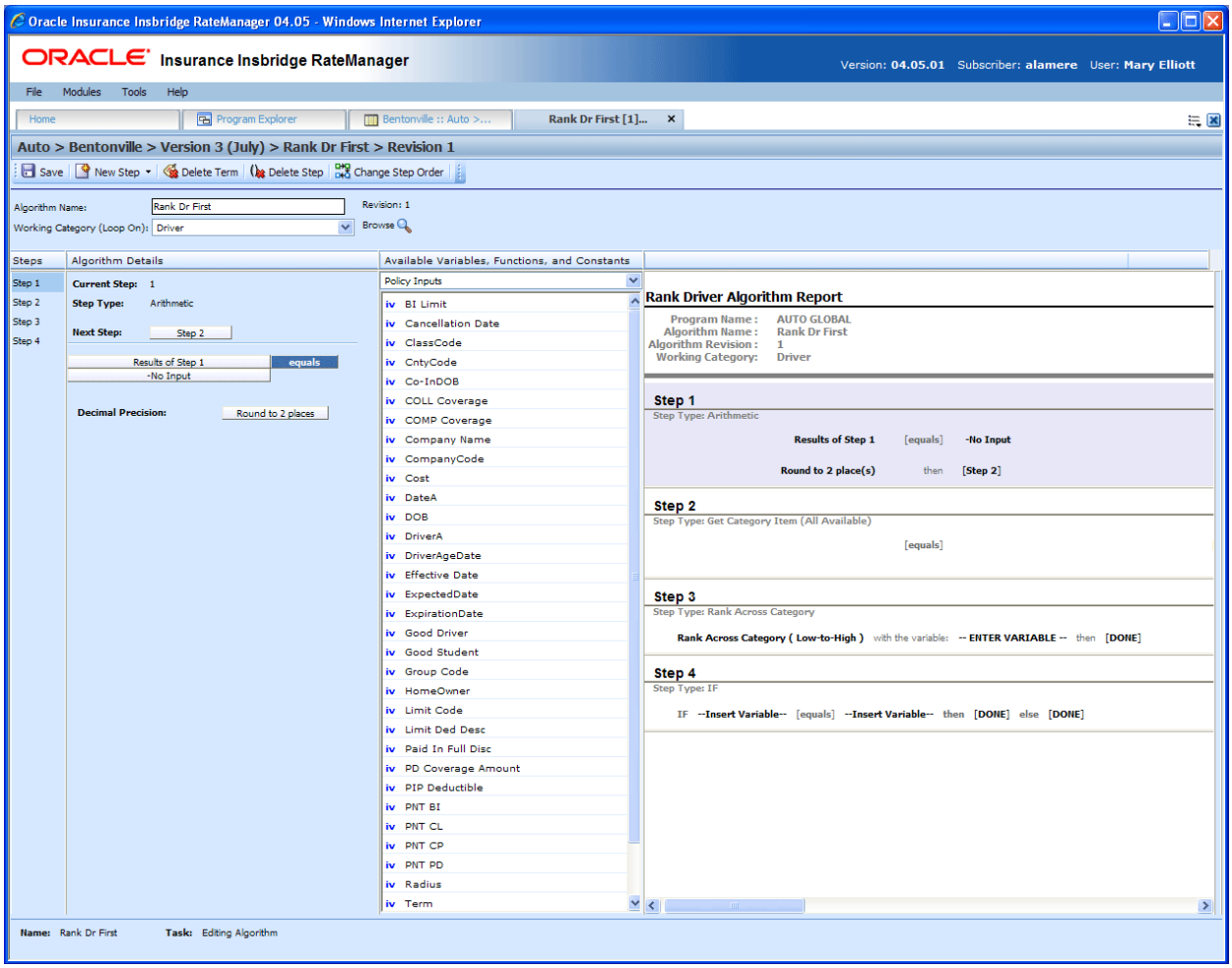


Figure 194 Driver Assignment Tab

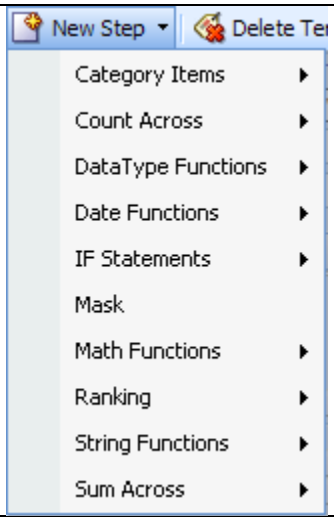
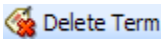
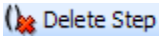
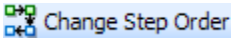
Driver Assignment Rules:

- The first step of a new driver assignment is always an arithmetic step. If you do not want an arithmetic step as your first step, add the step type you do want as Step 2. You can then delete the automatic arithmetic step.
- You cannot have a drivers assignment without any steps. There will always be at least one step. You will not be able to delete the last remaining step.

FUNCTIONALITY

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

Functions:

	Save: Saves the driver assignment.
	**New Step:** Creates a new step in the driver assignment. For more information, see Working with Steps. **NOTE:** *Driver Assignment Scenarios will have a "Set Principal Operator Variable" and a "Re-calculate Vehicle Usage: Using" step type in the list.*
	**Delete Term:** Deletes the currently selected term from a step in the driver assignment.
	**Delete Step:** Deletes the currently selected step. You cannot delete the last step of a driver assignment.
	**Change Step Order:** Allows users to change the order of the steps without using the drop and drag feature.

FIELDS

There are four areas on the Driver Assignment Tab.

- **Driver Assignment Information:** For a driver assignment scenario, the driver assignment information area contains the name and defines the Vehicle Usage Option of the driver assignment. For a driver assignment algorithm, the driver assignment information area contains the name and defines the working category of the driver assignment.
- **Driver Assignment Details:** The details area is where you enter the steps that the driver assignment will perform.
- **Available Variables, Functions and Constants:** The list of the available variables, functions and constants that can be used in the Algorithm Details area.
- **Driver Assignment Report:** A listing of all the steps currently in the driver assignment.

Driver Assignment Information

The driver assignment information area is where you define the driver assignment.

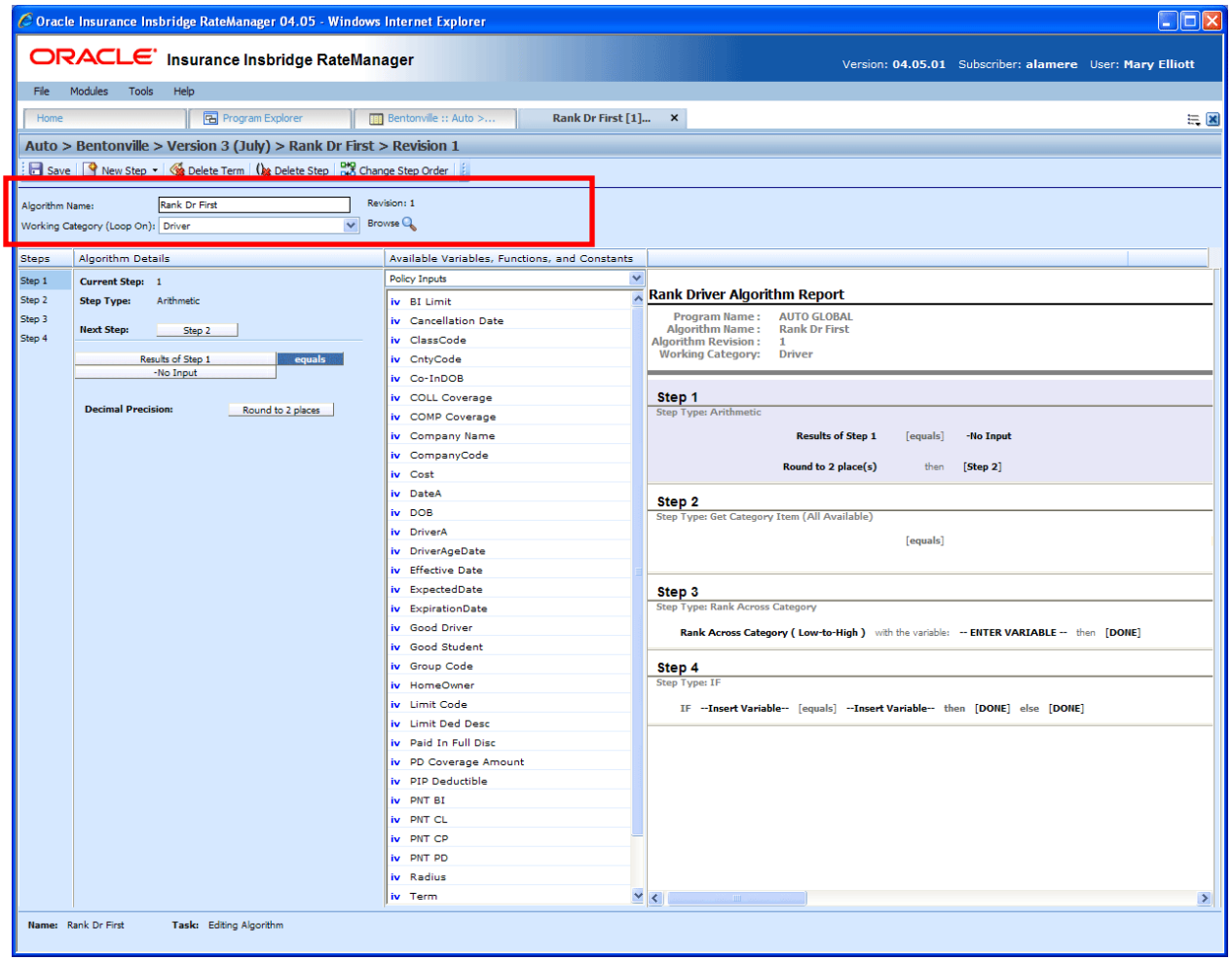


Figure 195 Driver Assignment Information Field

Fields

Algorithm Name: Entry for what you want the driver assignment to be called. Alphanumeric characters are permitted, but no special characters (ex: &, *, ", +, @, etc) are allowed.

For Driver Assignment Algorithms: Working Category: Sets the working category where the driver assignment algorithm will be run. You can select the working category from the drop down menu or you can browse for a working category by clicking **BROWSE**. This will bring up the Browse Category popup. From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the working category section.

The Working Category determines the options displayed in the Available Algorithms area. For example, if you select Policy as the Working Category, then the menu choices in the Available Variables area will be Functions, DA Results, Constants, Step Variables, Policy Inputs, Policy Variables and Policy Results.

All driver assignment scenarios will be under the Policy working category.

Driver Assignment Algorithms are used in Driver Assignment scenarios only. They will not be available to any other element in RateManager.

For Driver Assignment Scenario: Set Vehicle Usage Options: Set the Vehicle Usage Options where the driver assignment scenario will be run. Driver Assignment Algorithms will display the category where they were created.

Vehicle Usage Options

Vehicle Usage Options are available when you create a Drivers Assignment Scenario. Many carriers make decisions in driver assignment based on vehicle usage. The Vehicle Usage option you select will apply to the entire scenario. If you want to change vehicle usage, you must use the re-calculate vehicle usage step. In RateManager, four vehicle usage options are supported:

- Vehicle Usage by Vehicle Order (Input:299)
- Vehicle Usage on Drivers
- Driver Usage on Vehicles
- Vehicle Usage by VehicleID (Inputs:299/368)

Vehicle Usage by Vehicle Order (Input:299)

Vehicle usage is designated as the actual vehicle a driver principally operates, based on the order of the vehicles in the input file. For example, driver 1 principally operates the second vehicle on the policy. In RateManager, this is accomplished using the Driver input 299 (VehPrincipallyDriven). Specify the vehicle a driver principally operates by setting the VehPrincipallyDriven input equal to the order the vehicle appears in the input file.

Vehicle Usage on Drivers

Vehicle usage is designated as a percentage a driver operates each vehicle. For example, driver 1 operates vehicle 1 50% of the time and vehicle 2 50% of the time. In RateManager, this is accomplished using the Driver inputs 9-16 and 50 (DrvUsePctOnVehX, where X represents an integer 1-9). This method supports an unlimited number of drivers and up to nine vehicles. The percentages should add up to 100%.

Driver Usage on Vehicles

Vehicle usage is designated as a percentage a vehicle is operated by each driver.
For example, vehicle 1 is driven by driver 1 50% of the time and driver 2 50% of the time. In RateManager, this is accomplished using the Vehicle inputs 1-8 and 700 (VehUsePctOnDrvX, where X represents an integer 1-9). This method supports an unlimited number of vehicles and up to nine drivers. The percentages should add up to 100%.

Vehicle Usage by VehicleID (Inputs:299/368)

Vehicle usage is designated as the actual vehicle a driver principally operates, based on the vehicle number specified in the input file. For example, driver 1 principally operates vehicle 3. In RateManager, this is accomplished using the Vehicle input 368 (VehicleID) and Driver input 299 (VehPrincipallyDriven). Specify the vehicle a driver principally operates by setting the VehPrincipallyDriven input equal to the VehicleID of the vehicle the driver principally operates.

Algorithm Details

This area contains the steps that the driver assignment will perform.

A new driver assignment always begins with an arithmetic step as **Step 1**. If you do not want an arithmetic step as your first step, add the desired step and then delete the arithmetic step. To do so, highlight **Step 1** and click **DELETE STEP** in the menu bar at the top of the tab.

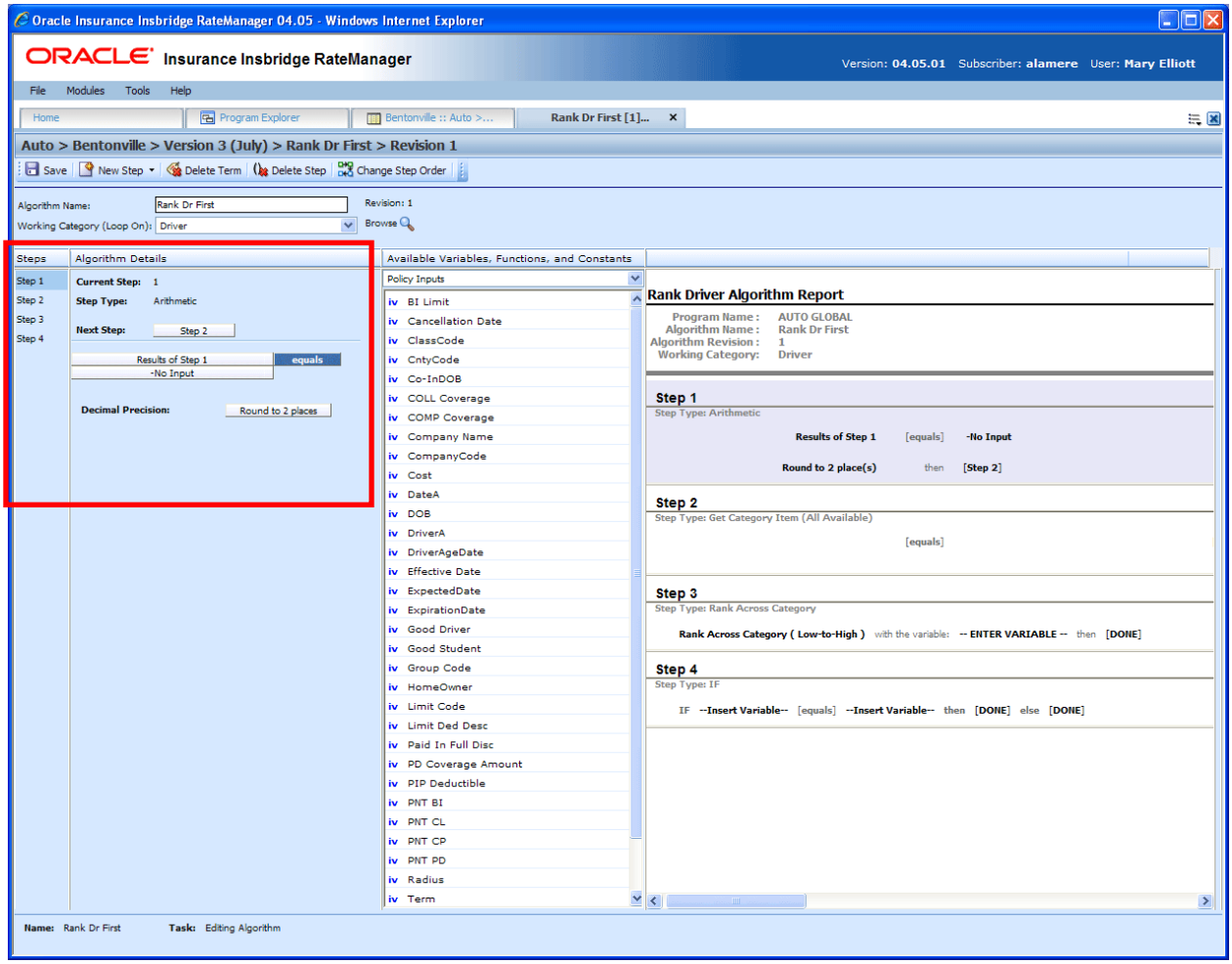


Figure 196 Algorithm Selection Criteria Field

Fields

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Algorithm Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set by clicking on the text box next to **Decimal Precision**. You can select a rounding precision from 0 to 9 digits.

Inputs and variables will have a right click menu available; View Report, View Where Used and Custom Value.

Available Variables, Functions and Constants

The Available Variables, Functions and Constants area contains a listing of available inputs, variables, and results, sorted by category and system constants that can be used as criteria. For global driver assignments, only global variables or inputs may be used. You cannot use any local variables in the creation of a global driver assignment. A globe icon is used to indicate a global variable.

For Inputs, you will be able to add a new input variable without leaving the Edit Driver Assignment tab. Scroll to the bottom of the Available Variables, Functions and Constants list and select <New Input Variable>. A popup will be displayed that will allow you to enter a new input variable.

You also will be able to add new a new result variable without leaving the Edit Driver Assignment tab.

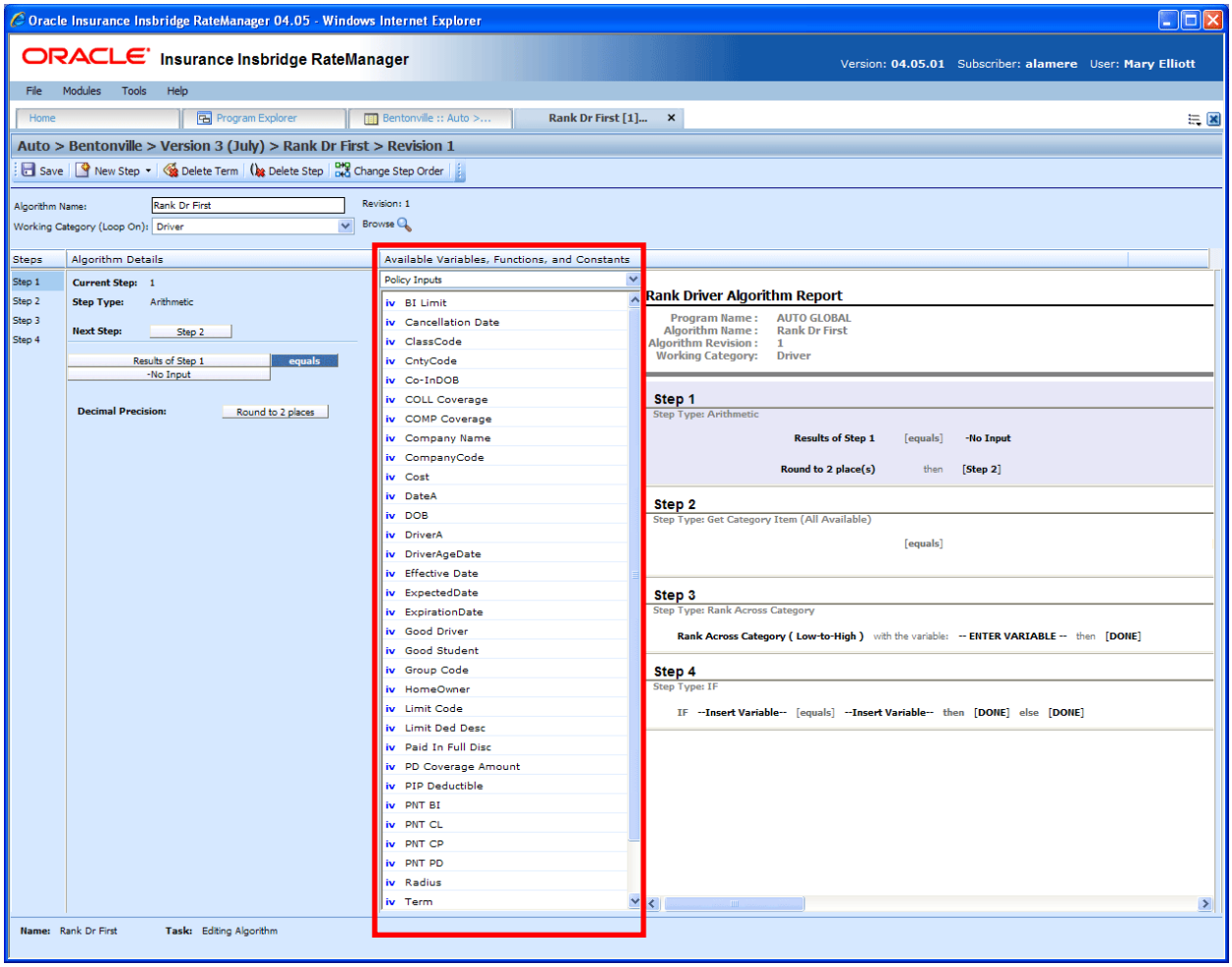


Figure 197 Available Variables, Function and Constants Field

Fields

Menu: The menu is the top most field. Click the down arrow to select the category you want. Policy variables will be available for all categories. Driver and Vehicle categories will be available in the Driver-Vehicle category. Categories are determined in the Algorithm Information area.

Selection: The available variables, functions, constants and step variables will be listed. Variables will be based on the type of driver assignment you select.

Scenario or Algorithm Report

This area contains a detailed list of the steps you have entered. This information is view only. No actions can be performed in this area.

Driver assignment scenarios will have a scenario report.

Driver assignment algorithms will have an algorithm report.

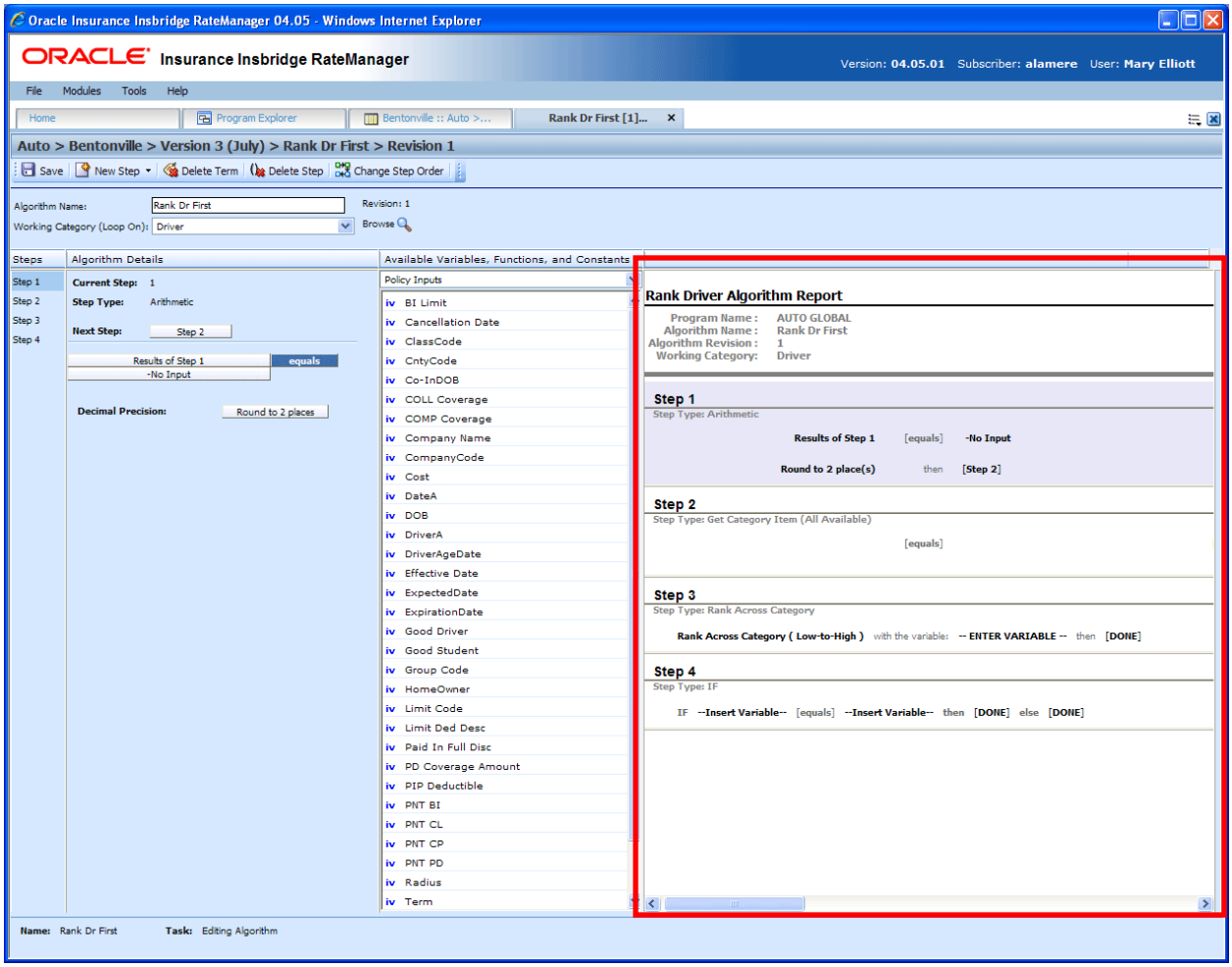


Figure 198 Algorithm Report

Selections for Available Variables, Functions and Constants

The selections in the Available Variables, Functions and Constants menu will depend upon the type of driver assignment you have selected. Some selection will be available in both driver assignment algorithms and driver assignment scenarios. Some selections, such as Algorithms and Functions, are available in driver assignment scenarios only.

Selection	Description
Functions: Program Callouts	Programs selected in the mapped callouts screen will be displayed here. For callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made. Callouts are program version specific and will be available in local algorithms and driver assignments only.
Functions: Library Callouts	Libraries selected in the mapped callouts screen will be displayed here. For callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made. Callouts are program version specific and will be available in local algorithms and driver assignments only.
DA Driver Results	System generated result variables that can be used to hold results for drivers. **Available in Driver Assignment scenarios only.**
DA Vehicle Results	System generated result variables that can be used to hold results for vehicles. **Available in Driver Assignment scenarios only.**
Algorithms: Flag Driver	Previously entered Driver assignment algorithms: flag driver, flag vehicle, rank driver and rank vehicle will be listed. Only driver assignment algorithms entered within the subline will be available. **Available in Driver Assignment scenarios only.**
Algorithms: Flag Vehicle	
Algorithms: Rank Driver	
Algorithms: Rank Vehicle	
Functions: Flagging	Driver assignment functions that perform specific actions, flagging, ranking, assignments and miscellaneous clearing functions. **Available in Driver Assignment scenarios only.** See Scenario Functions for more information.
Functions: Ranking	
Functions: Assignments	
Functions: Miscellaneous	
Constants	Selection of system constants, category instances and system date and time. Or you can create a custom value for use in this program.
Step Variables	Results from the previously entered steps.
Policy Inputs	Inputs in the Policy category.
Policy Variables	Table and calculated variables in the Policy category.
Policy Results	Result variables in the Policy category.

SCENARIO FUNCTIONS

In order to reproduce a variety of different carrier logic flows, RateManager has specific functions that are available only in a driver assignment scenario. These functions work similar to normal algorithm steps, except that the functions usually require an association with an algorithm instead of a variable. Inside a driver assignment scenario, the functions are available from the **Available Variables, Functions, and Constants** drop down.

To add one of the functions to your driver assignment scenario, double-click the one you want to add from the Available Variables, Functions, and Constants drop down menu.

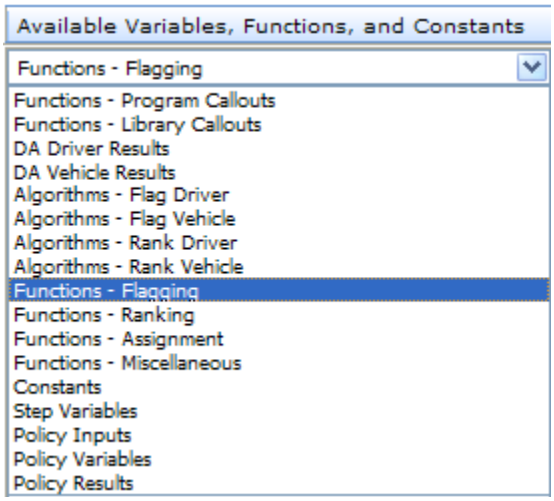


Figure 199 Functions Menu for Driver Assignment Scenario

The function categories are as follows:

- Flagging Functions
- Ranking Functions
- Assignment Functions
- Miscellaneous Functions

FLAGGING FUNCTIONS

Before covering all flagging functions available, it is important to understand the RateManager driver assignment concept of flagging. This process can be compared to that of filtering. For example, if you would like to select all drivers under the age of 21, in driver assignment you would make the statement "Flag all drivers under the age of 21". This operation is usually performed before making a calculation or assignment determination on a specific set of drivers or vehicles.

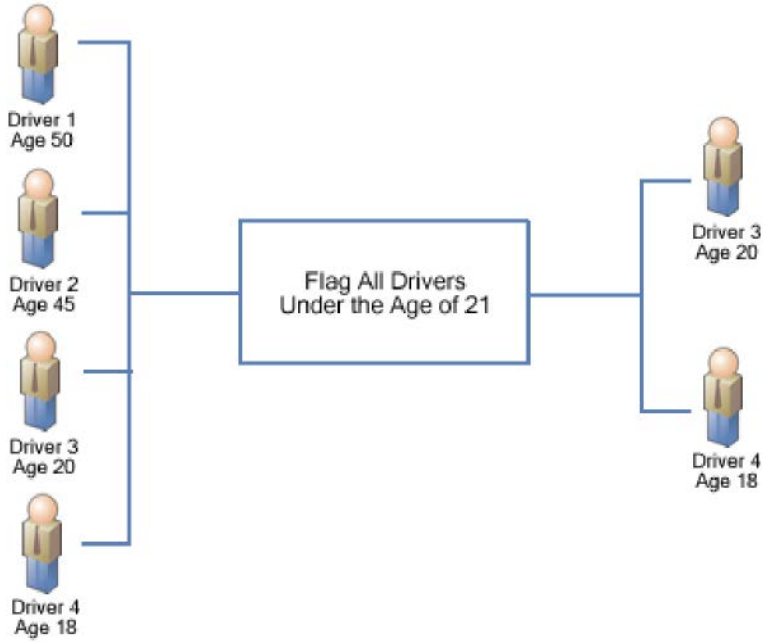
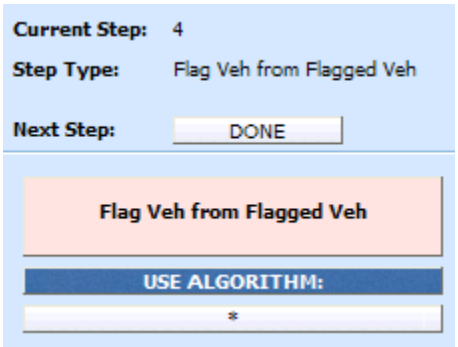


Figure 200 Flagging Functions

Most flagging functions require an association with a predefined flagging algorithm in order to determine custom criteria for the function. For more information, see Flagging Algorithms. Flagging functions are only available from within a driver assignment scenario.

To add a flagging function to your driver assignment scenario, select **Functions - Flagging** from the **Available Variables, Functions, and Constants** drop down and then double-click the flagging function you want to add. If the flagging function requires an association with a flagging algorithm, a box with an asterisk (*) will appear in the step type. Replace the asterisk box with a flagging algorithm the same way you would replace an item in a calculated variable or algorithm step.



The flagging algorithms are available from the **Available Variables, Functions, and Constants** drop down under **Algorithms - Flag Driver** and **Algorithms - Flag Vehicle.**

Available Flagging Functions

Flag 1st Ranked Drv

This flagging operation should only be performed after a driver ranking function. It chooses the 1st or top ranked driver from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag 1st Ranked Veh

This flagging operation should only be performed after a vehicle ranking function. It chooses the 1st or top ranked vehicle from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag All Vehs

All vehicles are in the scope and available for flagging, therefore ignoring any previously flagged vehicles. An association with a predefined flag vehicle algorithm must be made in this function.

Flag Assigned Vehs

All assigned vehicles are in the scope and available for flagging, therefore ignoring any previously flagged vehicles. An association with a predefined flag vehicle algorithm must be made in this function.

Flag Drvs [All]

All drivers are in the scope and available for flagging, therefore ignoring any previously flagged drivers. An association with a predefined flag driver algorithm must be made in this function.

Flag Drvs [All] (Usage Set)

This flagging operation should only be used when the Vehicle Usage Option is set to Vehicle Usage on Drivers. This flagging operation creates a collection, or usage set, of drivers for each vehicle that can then be ranked and assigned using similar Usage Set functions. Currently, this operation will function correctly only when “Weight Usage Result” is selected in the “Use Algorithm” field. The “Weight Usage Result” selection creates usage sets of drivers consisting of any driver whose DrvUsePctOnVehX input value for the corresponding vehicle is not null.

Example 1:

Driver 1
DrvUsePctOnVeh1 = 30
DrvUsePctOnVeh2 = 70
DrvUsePctOnVeh3 = NULL

Driver 2
DrvUsePctOnVeh1 = NULL
DrvUsePctOnVeh2 = 10
DrvUsePctOnVeh3 = 90

Vehicle 1's usage set of drivers will include Driver 1 only.
Vehicle 2's usage set of drivers will include both Driver 1 and Driver 2.
Vehicle 3's usage set of drivers will include Driver 2 only.

This flagging function also lets the user specify up to three vehicle-level inputs or variables that can be used in a Rank Driver or Flag Driver algorithms, where vehicle-level inputs or variables would ordinarily not be available. These variables are labeled "Usage Set Variable #1-3" and are available under the "DA Driver Results" available variable listing.

The "Weight Usage Result" system variable can also be used in a Rank Driver or Flag Driver algorithm, after the Flag Drvs [All] (Usage Set) operation has been performed. This system variable returns the value of the driver's DrvUsePctOnVehX input corresponding to the vehicle usage set that a Rank Driver or Flag Driver algorithm is operating on.

Example 2:

Using the usage sets created in Example 1, if we are ranking the drivers in Vehicle 2's usage set high-to-low based on driver use percentage, we would create a Rank Driver algorithm using the Weight Usage Result. In this case, Driver 1 would be ranked before Driver 2 because Driver 1's DrvUsePctOnVeh2 = 70 while Driver 2's DrvUsePctOnVeh2 = 10.

This flagging option will only be available on Vehicle Usage Options, Vehicle Usage on Drivers and Driver Usage on Vehicles.

Flag Drvs from Flag Drvs

This flagging operation should only be performed after a flag driver function. All previously flagged drivers are in the scope and available for further flagging. An association with a predefined flag driver algorithm must be made in this function.

Flag Drvs: Assigned

All assigned drivers are in the scope and available for flagging, therefore ignoring any previously flagged drivers. An association with a predefined flag driver algorithm must be made in this function.

Flag Drvs: Unassigned

All unassigned drivers are in the scope and available for flagging, therefore ignoring any previously flagged drivers. An association with a predefined flag driver algorithm must be made in this function.

Flag Last Ranked Drv

This flagging operation should only be performed after a driver ranking function. It chooses the last ranked driver from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag Last Ranked Veh

This flagging operation should only be performed after a vehicle ranking function. It chooses the last ranked vehicle from the previous ranking operation. This is a standalone function, so an association with an algorithm is not required.

Flag Unassigned Vehs

All unassigned vehicles are in the scope and available for flagging, therefore ignoring any previously flagged vehicles. An association with a predefined flag vehicle algorithm must be made in this function.

Flag Veh from Flagged Veh

This flagging operation should only be performed after a flag vehicle function. All previously flagged vehicles are in the scope and available for further flagging. An association with a predefined flag vehicle algorithm must be made in this function.

FLAGGING ALGORITHMS

Flagging algorithms are used in flagging functions to determine which drivers or vehicles to flag. Flagging algorithms work just like calculated variables and algorithms only they are created from the Driver Assignment Listing screen.

RateManager supports two types of flagging algorithms:

- **Flag Vehicle** algorithms
- **Flag Driver** algorithms

Both work the same in that at the end of the algorithm, you set a result equal to 1 to flag the item or 0 to not flag the item. The only difference being that **Flag Vehicle** algorithms are used to flag vehicles by setting **Vehicle Result,** while **Flag Driver** algorithms are used to flag drivers by setting **Driver Result.**

Shown below is an example of a **Flag Driver** algorithm. It uses a predefined driver calculated variable, Driver Age, to determine if it should set the **Driver Result.**

Step 1: IF Driver Age [less than] 21 then [Step 2] else [Done]
Step 2: Driver Result = 1

Vehicle Result and **Driver Result** are available from the **Available Variables, Functions, and Constants** drop down under **DA Vehicle Results** and **DA Driver Results,** respectively.

RANKING FUNCTIONS

A ranking function ranks the specified items based on the specified criteria. Ranking functions are usually used prior to making an assignment determination on a specific set of drivers or vehicles.

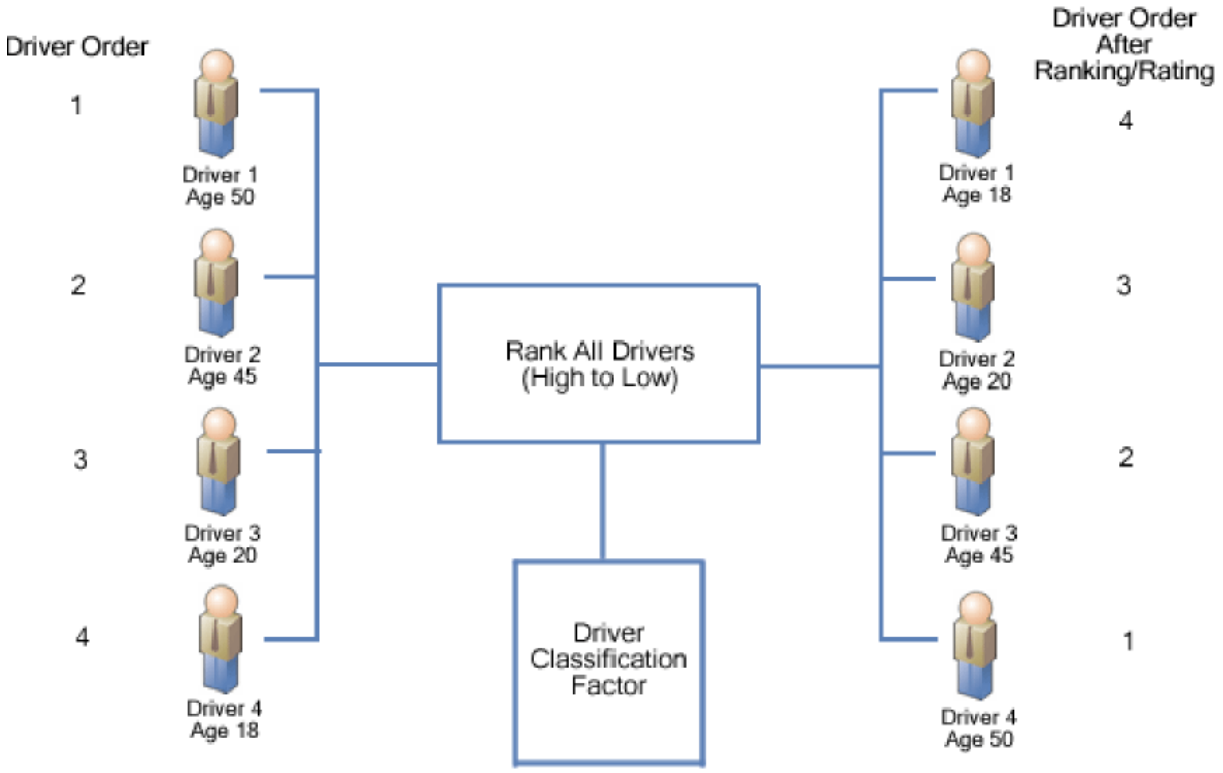
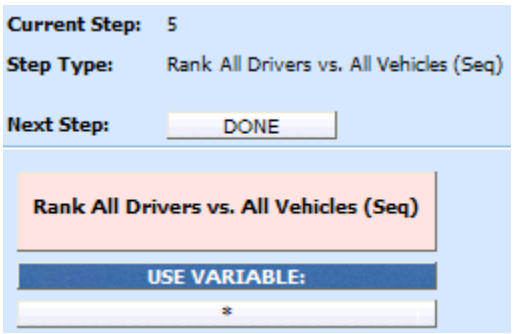


Figure 201 Ranking Functions

All ranking functions require an association with a predefined ranking algorithm, in order to determine custom criteria for ranking. For more information, see Ranking Algorithms. Ranking functions are only available from within a driver assignment scenario.

To add a ranking function to your driver assignment scenario, select **Functions - Ranking** from the **Available Variables, Functions, and Constants** drop down and then double-click the ranking function you want to add. Since the ranking function requires an association with a ranking algorithm, a box with an asterisk (*) will appear in the step type. Replace the asterisk box with a ranking algorithm the same way you would replace an item in a calculated variable or algorithm step.



The ranking algorithms are available from the **Available Variables, Functions, and Constants** drop down under **Algorithms - Rank Driver** and **Algorithms - Rank Vehicle.**

Available Ranking Functions

Rank All Drvs (Low-to-High)

This function ranks all of the drivers, according to the specified function, in ascending order (lowest to highest).

Rank All Drivers vs. All Vehicles (Seq)

This ranking function uses the result of a Driver-Vehicle variable and ranks every possible Driver & Vehicle pair, high to low. This step should be performed prior to the 'Assign 1st Ranked Veh to 1st Ranked Driver (Seq)' assignment functions.

Rank All Drvs (High-to-Low)

This function ranks all of the drivers, according to the specified function, in descending order (highest to lowest).

Rank All Drvs (High-to-Low) (Usage Set - Conditional)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. An If step is used to test criteria in the scope of the drivers in each usage set. The drivers in each usage set are then ranked, using one of two specified functions, in descending order (highest to lowest).

Rank All Drvs (High-to-Low) (Usage Set)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. This function ranks all of the drivers in each usage set, according to the specified function, in descending order (highest to lowest). This ranking operation should be used when the Vehicle Usage Option is set to Vehicle Usage on Drivers.

Rank All Drvs (Low-to-High) (Usage Set - Conditional)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. An If step is used to test criteria in the scope of the drivers in each usage set. The drivers in each usage set are then ranked, using one of two specified functions, in ascending order (lowest to highest).

Rank All Drvs (Low-to-High) (Usage Set)

This ranking operation should only be performed after a Flag Drvs [All] (Usage Set) operation. This function ranks all of the drivers in each usage set, according to the specified function, in ascending order (lowest to highest). This ranking operation should be used when the Vehicle Usage Option is set to Vehicle Usage on Drivers.

Rank All Vehs (High-to-Low)

This function ranks all of the vehicles, according to the specified function, in descending order (highest to lowest).

Rank All Vehs (Low-to-High)

This function ranks all of the vehicles, according to the specified function, in ascending order (lowest to highest).

Rank Assigned Vehs (High-to-Low)

All assigned vehicles are in the scope and available for ranking, therefore ignoring any unassigned vehicles. Using only the current scope, it ranks all of the vehicles, according to the specified function, in descending order (highest to lowest).

Rank Assigned Vehs (Low-to-High)

All assigned vehicles are in the scope and available for ranking, therefore ignoring any unassigned vehicles. Using only the current scope, it ranks all of the vehicles, according to the specified function, in ascending order (lowest to highest).

Rank Flagged Drvs (High-to-Low)

This ranking operation should always be performed after a flag driver operation. All previously flagged drivers are in the scope and available for ranking. Using only the current scope, it ranks all of the drivers, according to the specified function, in descending order (highest to lowest).

Rank Flagged Drvs (Low-to-High)

This rating/ranking operation should always be performed after a flag driver operation. All previously flagged drivers are in the scope and available for ranking. Using only the current scope, it ranks all of the drivers, according to the specified function, in ascending order (lowest to highest).

Rank Unassigned Vehs (High-to-Low)

All unassigned vehicles are in the scope and available for ranking, therefore ignoring any assigned vehicles. Using only the current scope, it ranks the vehicles, according to the specified function, in descending order (highest to lowest).

Rank Unassigned Vehs (Low-to-High)

All unassigned vehicles are in the scope and available for ranking, therefore ignoring any assigned vehicles. Using only the current scope, it ranks the vehicles, according to the specified function, in ascending order (lowest to highest).

RANKING ALGORITHMS

Ranking algorithms are used in ranking functions to determine how to rank drivers or vehicles. Ranking algorithms work just like calculated variables and algorithms, only they are created from the Driver Assignment Listing screen.

RateManager supports two types of ranking algorithms:

- **Rank Vehicle** algorithms
- **Rank Driver** algorithms

Both algorithms work the same in that at the end of the algorithm, you set a result equal to the value to be used for ranking. The only difference being that **Rank Vehicle** algorithms are used to rank vehicles by setting **Vehicle Result,** while **Rank Driver** algorithms are used to rank drivers by setting **Driver Result**. Shown below is an example of a **Rank Driver** algorithm. It uses a predefined driver table variable, Pleasure Use Factor, to set the **Driver Result**.

Step 1: **Driver Result** = Pleasure Use Factor

Vehicle Result and **Driver Result** are available from the **Available Variables, Functions, and Constants** drop down under **DA Vehicle Results** and **DA Driver Results,** respectively.

ASSIGNMENT FUNCTIONS

In driver assignment, there are many ways to assign a particular driver, or set of drivers, to a particular vehicle, or set of vehicles. SoftRater assigns drivers to vehicles using assignment functions. All assignment functions are standalone, meaning they do not require an association with a predefined algorithm.

Assignment functions are only available from within a driver assignment scenario. To add an assignment function to your driver assignment scenario, select **Functions - Assignment** from the list of **Available Variables, Functions, and Constants** drop down and then double-click the assignment function you want to add.

For all assignment functions, a vehicle cannot be reassigned, e.g. if vehicle 1 was assigned to driver 1 in step 3 of the driver assignment, vehicle 1 cannot be assigned to a different driver in step 5. Also, SoftRater will not allow you to exit driver assignment without assigning a driver to each vehicle. In the event that your driver assignment scenario is finished, and vehicles remain unassigned, SoftRater will automatically assign the first driver to each of those vehicles.

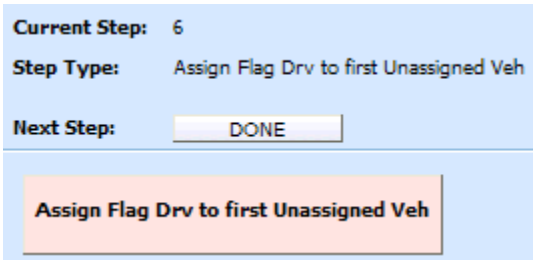


Figure 202 Adding an Assignment Function

Available Assignment Functions

Assign 1st Ranked Veh to 1st Ranked Drv

This assignment operation should only be performed after both a rank vehicle function and a rank driver function. It will assign the 1st or top ranked vehicle to the 1st or top ranked driver.

Assign 1st Ranked Veh to 1st Ranked Drv (Seq)

This assignment function should be performed after the 'Rank All Drivers vs. All Vehicles (Seq)' ranking function. The highest ranked Driver & Vehicle pairs are assigned until all vehicles have

been assigned a driver. If the Driver & Vehicle pairs are ranked such that a driver will be assigned to more than one vehicle, this assignment function will assign the driver to multiple vehicles.

Assign 1st Ranked Veh to 1st Ranked Drv (Seq) (with Exclusion)

This assignment function should be performed after the 'Rank All Drivers vs. All Vehicles (Seq) ranking function. The highest ranked Driver & Vehicle pairs are assigned until all vehicles have been assigned a driver. If the Driver & Vehicle pairs are ranked such that a driver will be assigned to more than one vehicle, this assignment function will not assign the driver to multiple vehicles, skipping the Driver & Vehicle pair until all vehicles have been assigned unique drivers.

Assign 1st Ranked Veh to 1st Ranked Drv (Usage Set)

This assignment operation should only be performed after both a Rank Vehicle function and a Rank Drivers (Usage Set) function. It will assign the 1st or top ranked vehicle to the 1st or top ranked driver in the vehicle's usage set.

This ranking option will only be available on Vehicle Usage Options, Vehicle Usage on Drivers and Driver Usage on Vehicles.

Assign 1st Ranked Veh to 1st Ranked Drv (with Exclusion)

This assignment function should be performed after a Rank Vehicle function and a Rank Driver function. The highest ranked driver will be assigned to the highest ranked vehicle, then the second-highest ranked driver will be assigned to the second-highest ranked vehicle, and so on. Each driver will be assigned to only one vehicle in this assignment function. An additional assignment function will need to be included to handle unassigned vehicles.

Assign 1st Ranked Veh to Flag Drv

This assignment operation should only be performed after both a rank vehicle and flag driver function. It will assign the 1st or top ranked vehicle to the flagged driver. If multiple drivers are flagged, the first driver that was flagged will be assigned to the 1st ranked vehicle.

Assign All Vehs by Princ Op (Drvs NONEXCLUSIVE)

This assignment operation is performed after the **Set Principal Operator Variable** function, unless the principal operator indicator is passed as an input (input ID 253). This assignment operation assigns all drivers to the vehicle they principally drive. The assignment will be performed nonexclusively, meaning that if a driver is the principal operator on more than one vehicle, the driver will be assigned to each one.

Assign Flag Drv to all Unassigned Vehs

This assignment operation should only be performed after a flag driver function. It will assign the currently flagged driver to all unassigned vehicles. If multiple drivers are flagged, the first driver that was flagged will be assigned to all unassigned vehicles.

NOTE: *This function is usually used in left over vehicle situations.*

Assign Flag Drv to first Unassigned Veh

This assignment operation should only be performed after a flag driver function. It will assign the currently flagged driver to the 1st unassigned vehicle, based on vehicle order. If multiple drivers are flagged, the first driver that was flagged will be assigned to the first unassigned vehicle.

NOTE: *This function is usually used in left over vehicle situations, where there are different criteria for each left over vehicle depending on the number.*

Assign Unassigned Vehs by Princ Op (Drvs EXCLUSIVE)

This assignment operation is performed after the **Set Principal Operator Variable** function, unless the principal operator indicator is passed as an input (input ID 253). This assignment operation assigns all unassigned vehicles to the driver that principally operates them. The assignment will be performed exclusively, meaning that if a driver is the principal operator on more than one vehicle, the driver will be assigned to only the first vehicle they principally operate, and if that vehicle is already assigned, the driver will not be assigned in this step.

Assign Unassigned Vehs by Princ Op (Drvs NONEXCLUSIVE)

This assignment operation is performed after the **Set Principal Operator Variable** function, unless the principal operator indicator is passed as an input (input ID 253). This assignment operation assigns all unassigned vehicles to the driver that principally operates them. The assignment will be performed nonexclusively, meaning that if a driver is the principal operator on more than one vehicle, the driver will be assigned to each vehicle they principally operate.

Assign Veh Usually Driven (All) by Flag Drv

This assignment operation should only be performed after a flag driver function. It will assign the flagged drivers to the vehicle(s) they operate most frequently. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles. If multiple flagged drivers principally operate the same vehicle, the driver that appears first in the input file will be assigned to the vehicle.

Assign Veh Usually Driven (All) by Ranked Drv (All) (High-to-Low)

This assignment operation should only be performed after a rank driver function. It will assign all ranked drivers to all vehicle(s) they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles. The set of driver/vehicle usage inputs used is determined by the Vehicle Usage Option selected on the Driver Assignment Scenario.

Assign Veh Usually Driven (All) by Ranked Drv (All) (Low-to-High)

This assignment operation should only be performed after a rank driver function. It will assign all ranked drivers to all vehicle(s) they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles. The set of driver/vehicle usage inputs used is determined by the Vehicle Usage Option selected on the Driver Assignment Scenario.

Assign Veh Usually Driven (All) by Ranked Drv (High-to-Low)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle(s) they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the

vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles.

Assign Veh Usually Driven (All) by Ranked Drv (Low-to-High)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle(s) they operate most frequently. Assignment will start with the lowest ranked driver and work up to the highest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will be assigned to each of those vehicles.

Assign Veh Usually Driven by Flag Drv

This assignment operation should only be performed after a flag driver function. It will assign the flagged drivers to the vehicle they operate most frequently. In the event a driver operates more than one vehicle the same amount of time, the driver will not be assigned to any vehicles. If multiple flagged drivers principally operate the same vehicle, the driver that appears first in the input file will be assigned to the vehicle.

Assign Veh Usually Driven by Ranked Drv (High-to-Low)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle they operate most frequently. Assignment will start with the highest ranked driver and work down to the lowest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the highest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will not be assigned to any vehicles.

Assign Veh Usually Driven by Ranked Drv (Low-to-High)

This assignment operation should only be performed after a rank driver function. It will assign the ranked drivers to the vehicle they operate most frequently. Assignment will start with the lowest ranked driver and work up to the highest ranked driver. If multiple ranked drivers principally operate the same vehicle, the driver with the lowest ranking will be assigned to the vehicle. In the event a driver operates more than one vehicle the same amount of time, the driver will not be assigned to any vehicles.

Assign Veh Usually Driven by Unassigned Drvs

This assignment operation will assign drivers that have not been assigned, to the vehicle they operate most frequently. If multiple unassigned drivers principally operate the same vehicle, the driver that appears first in the input file will be assigned to the vehicle.

Assign Vehs by Drv Usage using Last Ranked Veh

This assignment operation should only be performed when the Vehicle Usage Option is set to **Driver Usage on Vehicles.** It also should only be performed after a rank vehicle function. It will assign vehicles, starting with the last ranked vehicle, to the driver that operates the vehicle most frequently.

Assign Vehs by Drv Usage using 1st Ranked Veh

This assignment operation should only be performed when the Vehicle Usage Option is set to **Driver Usage on Vehicles.** It also should only be performed after a rank vehicle function. It will

assign vehicles, starting with the 1st ranked vehicle, to the driver that operates the vehicle most frequently.

Assign Vehs Using DA Override Inputs

This assignment operation will assign drivers to vehicles based on the information passed in the input file. It requires three inputs:

- The Vehicle input AssignmentOverride (input ID 400), which is used to signal that the vehicle's assignment can be overridden. Use a 1 to indicate that the assignment can be overridden or a 0 to indicate that the assignment cannot be overridden.
- The Driver input DriverID (input ID 367), which contains a driver number for the current driver.
- The Vehicle input AssignedDriver (input ID 17), which contains the number of the driver (based on DriverID) that should be assigned to the current vehicle.

Miscellaneous Functions

In driver assignment, there are a few functions that do not fit into a particular category. All miscellaneous functions are standalone, meaning they do not require a predefined algorithm.

Miscellaneous functions are only available from within a driver assignment scenario.

To add a miscellaneous function to your driver assignment scenario, select **Functions - Miscellaneous** from the list of **Available Variables, Functions, and Constants** drop down and then double-click the miscellaneous function you want to add.

Available Miscellaneous Functions

Clear Drv Ranking

When ranking drivers, the system allows for cascading ranking operations. This function breaks the cascading ranking that is inherent when using back-to-back ranking operations. This clear function should always be performed after a rank driver operation, when cascading is not desired.

Clear Drv Ranking (Usage Set)

When ranking drivers, the system allows for cascading ranking operations within a usage set. This function breaks the cascading ranking that is inherent when using back-to-back ranking operations. This clear function should always be performed after a Rank Driver (Usage Set) operation, when cascading is not desired.

Clear Veh Ranking

When ranking vehicles, the system allows for cascading ranking operations. This function breaks the cascading ranking that is inherent when using back-to-back ranking operations. This clear function should always be performed after a rank vehicle operation, when cascading is not desired.

CREATING A NEW DRIVER ASSIGNMENT

Driver assignments can be created and added to standard programs and template generated programs. Local driver assignments will be available in the program where you created it and can be copied to other programs within the subline. Global driver assignments will be available across the subline.

Local and global driver assignments are created and function in much the same way. One difference is that global driver assignments can use only global table variables, inputs and result variables. Local driver assignments can use both local and global elements. Another difference is that global driver assignments can be created from the globals tab and from the program details tab.

To Create a Driver Assignment

1. On the Program Details tab of the program where you want to create a new driver assignment, select either the Global Driver Assignment folder or the Local Driver Assignment folder.

2. Click **NEW** in the top bar menu. You then need to select to create a driver assignment scenario or a driver assignment algorithm. If you do not want to select a folder, you can click NEW and select from there.

   NEW→Globals→Driver Assignment→DA Scenario
   NEW→Globals→Driver Assignment →Flag Driver
   NEW→Globals→Driver Assignment →Rank Driver
   NEW→Globals→Driver Assignment →Flag Vehicle
   NEW→Globals→Driver Assignment →Rank Vehicle
   NEW→Locals→Driver Assignment →DA Scenario
   NEW→Locals→Driver Assignment →Flag Driver
   NEW→Locals→Driver Assignment →Rank Driver
   NEW→Locals→Driver Assignment →Flag Vehicle
   NEW→Locals→Driver Assignment →Rank Vehicle

3. This will open the Driver Assignment tab for the new driver assignment where you can enter or select the variable elements you need.

4. Enter a **NAME** for the driver assignment.

5. **FOR AN ALGORITHM:** Choose a **WORKING CATEGORY**. You can select the working category from the drop down menu or you can browse for a working category by clicking **BROWSE**. This will bring up the Browse Category popup.

   From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the working category section. If this is not the screen you want, click **Cancel** to close the popup and return to the previous screen.

NOTE: *Always save a driver assignment algorithm after defining the name, and working category. The driver assignment will not be available to be used within a step until the variable has been saved.*

6. **FOR A SCENARIO:** Choose a **VEHICLE USAGE OPTION**.

NOTE: *Always save a driver assignment scenario after defining the name and vehicle usage option. The driver assignment will not be available to be used within a step until the variable has been saved.*

7. The first step will be populated in the Algorithm Details area. This must be a mathematical step. If you do not want an arithmetic step as your first step, add the desired step and then delete the arithmetic step. To do so, highlight **Step 1** and click **DELETE STEP** in the menu bar at the top of the tab.

8. To add a new step to the driver assignment, click **NEW STEP** and select the type of step you want to add. The screen will refresh with the new step parameters. Depending upon the step type, you will have to select the appropriate variables, functions, constants or inputs. The value you need to select will be listed on the step.

   For example, if the step has an "Enter Variable" box, you must choose the variable type from the menu in the Available Variables, Functions and Constants area. The options will be populated underneath. Click the "Enter Variable" box and then double-click the corresponding variable you want. The box will refresh with your selected value. For more information on the types of steps, see Working with Steps.

9. Continue entering steps until complete. When you are finished making your entries, click **Save**.

NOTE: *When selecting Callouts for use in a driver assignment or algorithm, the driver/vehicle category cannot be mapped.*

Adding an Input Variable, Result Variable or Custom Value Constant

A new input variable, result variable or custom value constant can be created while entering or editing a driver assignment, without leaving the Edit screen.

- To add an **Input Variable**: See Adding a New Input
- To add a **Custom Value Constant**: See Constants
- To add a **Result Variable**: See Adding a Result Variable

EDITING A DRIVER ASSIGNMENT

Editing a driver assignment allows you to change information about the scenario/algorithm such as name, vehicle usage option or working category and steps. Driver assignments that are grayed out or locked cannot be edited. Template generated driver assignments that are using revision 1 are not open for editing. If you want to edit a template generated driver assignment, you must create a new revision. The new revision will be open for editing except for the name. The name cannot be changed. Changes are effective immediately. Global driver assignments can be edited from the globals tab or from the program details tab.

NOTE: *If a change is made to a global driver assignment, the change affects all programs that use the global driver assignment. If a change only needs to be made to one particular program, create a local driver assignment in the program and have the program reference the local driver assignment instead of the global.*

To Edit a Driver Assignment

1. On the Program Details tab, select the **Driver Assignment** you want to edit.

2. Double click or right click and select **EDIT**. The Edit Driver Assignment tab will open with the details of the driver assignment.

3. Make any changes.

   To change the step order, you have two options:

   - **Option 1:** Select a step in the Steps column, drag it to a new location in the list and drop it.

   - **Option 2:** Select the step you want to move and click CHANGE STEP ORDER. A separate screen will be displayed.
     - The current step position will be displayed at the top of the screen. Select where you want the step to be placed.
     - Click OK. You will be returned to the Edit Algorithm tab. Your step should be placed where you chose.

   To delete a step, select the step in the Steps column and then click DELETE STEP. You cannot delete the last step from an algorithm.

4. Click **SAVE** to save your work.

COPYING A DRIVER ASSIGNMENT

Any driver assignment may be copied at any time. In your default subline, local driver assignments may be copied to any program within the subline. Global driver assignments can be copied within the same subline. Template generated programs will allow you to copy driver assignments only within the same program. Any copied driver assignment will be open for editing. To make a change to the driver assignment, you must go to the edit tab.

When copying a driver assignment, the structure (including the vehicle usage options/category and steps) is copied. Only the active revision is copied. If you have a driver assignment with 10 revisions, and you copy the driver assignment, only the active revision will be copied into the new drivers assignment. The other 9 revisions will not be copied.

For Local Driver Assignments, there are two copy options:

- **Existing Program:** Copy the driver assignment into the existing program under another name.

- **Other Program:** Copy the driver assignment into another program within the same subline. This option is for driver assignments within your default subline.

Global driver assignments can be copied from the globals tab or from the program details tab. Unlike a local driver assignment, you will not be able to select copy options.

To Copy a Driver Assignment

1. Select the driver assignment you would like to copy and right click it. Select **Copy** from the popup menu.

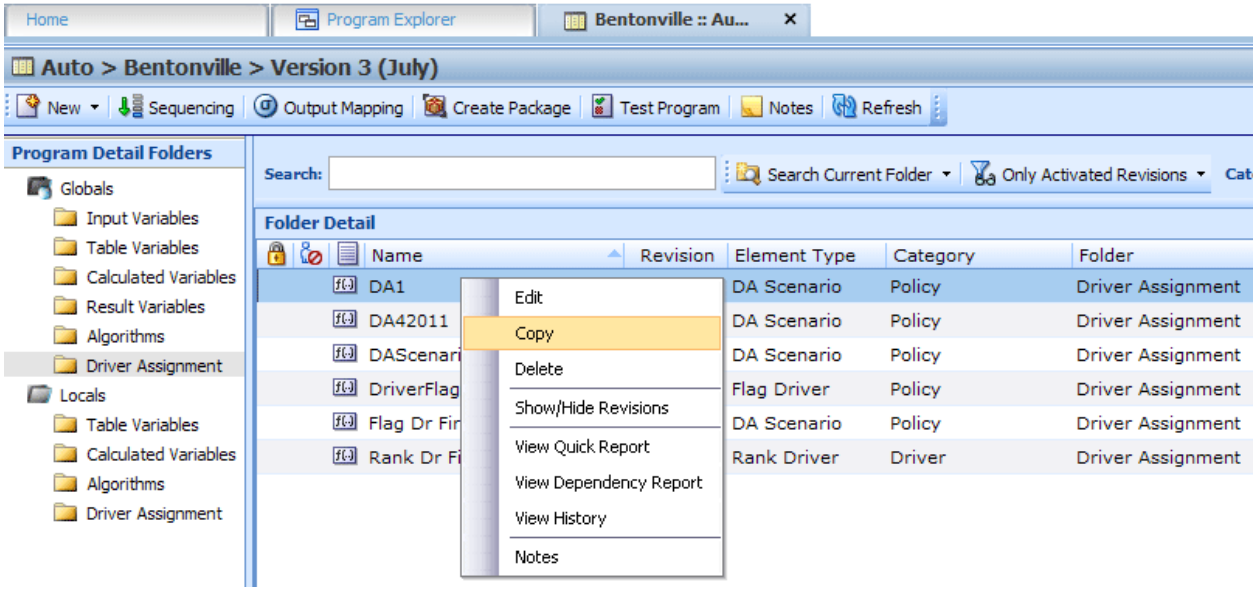


Figure 203 Copy Driver Assignment Menu

2. A separate popup window will be displayed.

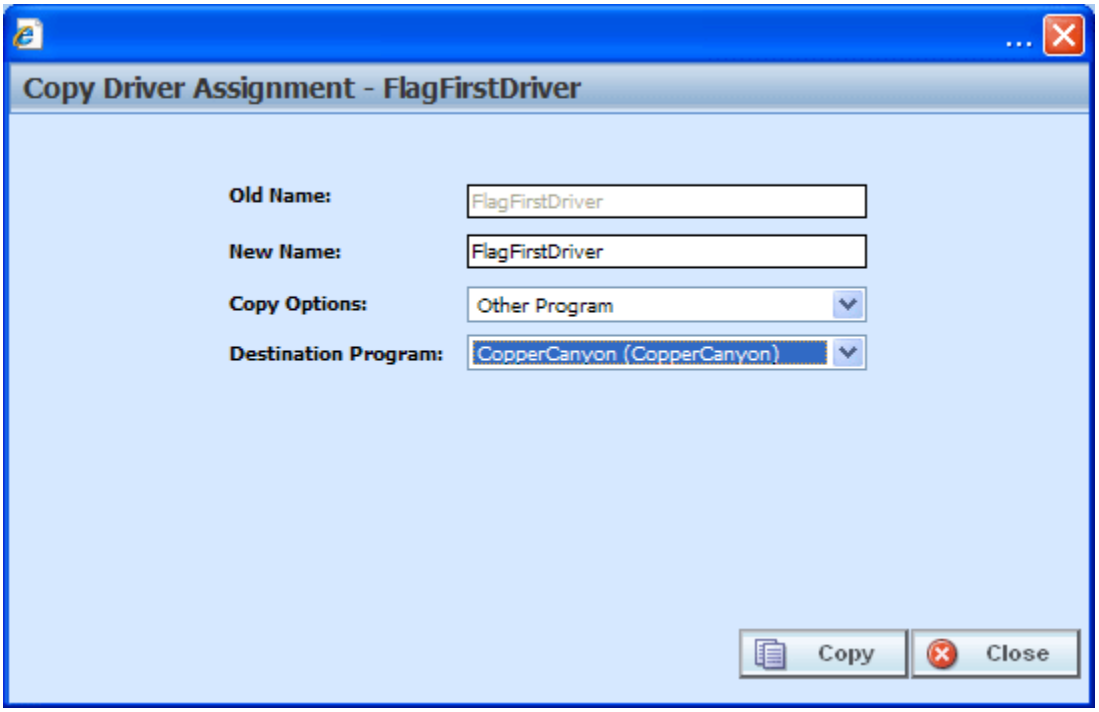


Figure 204 Copy Driver Assignment Popup

3. Enter in a **New Name**.

4. Select the **Copy Options**.

5. If you are copying a driver assignment within your default subline, you can select to copy the driver assignment to another program within the same subline. Select the **Destination Program** from the drop down menu.

6. Click **Copy** to copy the driver assignment. Dependencies will be searched. If there are any dependencies that need to be resolved, a popup window will be displayed. See Resolving Dependencies.

7. If the copy was successful, you will be returned to the previous screen. Your driver assignment will have been copied. The last updated date will be the date the copy was made.

DELETING A DRIVER ASSIGNMENT

When a driver assignment scenario or algorithm is no longer needed, it can either be left in RateManager or deleted. When you delete a driver assignment scenario or algorithm:

- The driver assignment scenario or algorithm gets deleted from all versions of the program.
- All revisions of that driver assignment scenario or algorithm get deleted as well.
- When you delete a driver assignment algorithm, it will be deleted from any driver assignment scenario that is using it.

If you are uncertain as to whether the driver assignment will be used again, leave it in RateManager. This will save time if the driver assignment is needed again and leaving it in RateManager will not slow down rating. If you try to delete a driver assignment scenario that is being used in a sequence, you will receive an error. Driver assignments that are locked or that are template generated cannot be deleted.

NOTE: *Driver Assignment scenarios that are being used in a sequence cannot be deleted.*

Any unlocked global driver assignment that is not in use can be deleted. Global driver assignments that are in use, locked, or template generated cannot be deleted. If you try to delete a global driver assignment that is unavailable for deletion, an error message will be displayed informing you where the global driver assignment is being used. Locked and template generated driver assignments will be grayed out.

A lock icon indicates that this driver assignment is locked by either a program or a template and is not open for editing or deleting.

Global driver assignment revisions can be deleted from the globals tab or from the program details tab.

To Delete a Driver Assignment

1. Navigate to the **Program Details tab** for the program that contains the driver assignment you want to delete.

2. Select the driver assignment you want to delete and right click. Select **Delete** from the popup menu.

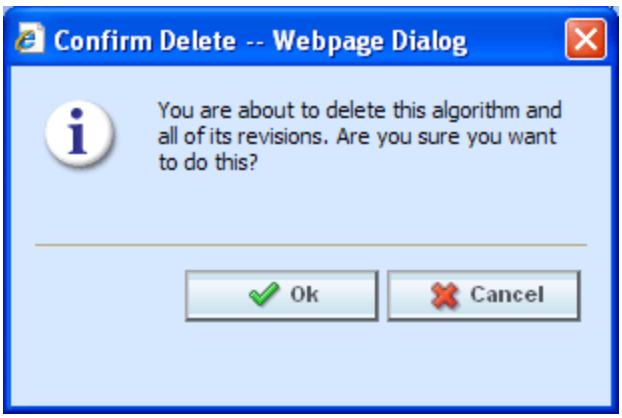


Figure 205 Deleting a Driver Assignment

3. You will be asked to confirm the deletion. Select **Ok** to delete the driver assignment and refresh the list of driver assignment. Select **Cancel** to return to the Program Details tab.

NOTE: *If you try to delete a driver assignment scenario that is being used in a sequence by any program version, you will receive an error message.*

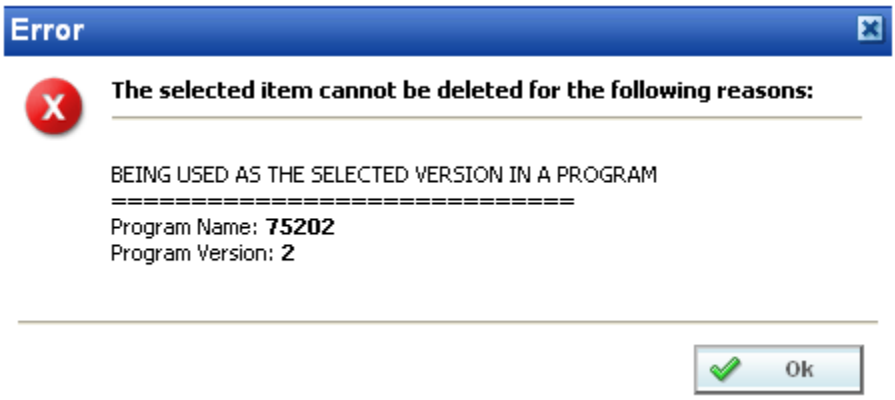


Figure 206 Driver Assignment Delete Error Message

Chapter 18

CALLOUTS

Callouts are programs or SoftLibraries that are used by the initiating program to run another program or call to an outside party. A callout is a step within a local algorithm or driver assignment. When the algorithm or driver assignment is executed, the callout will run the selected program or SoftLibrary and return with results that can be carried further into the rating.

There are two types of Callouts:

P2P: Program to Program Callout. This is when one program makes a call to another program within the subline and requests that program to run.

P2L: Program to Library callout. This is when a program makes a call to a SoftLibrary that has been loaded into IBFA. 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.

NOTE: *SoftLibraries are loaded into the IBFA by a system administrator. SoftLibraries will be displayed in RateManager only after they have been loaded into IBFA. If a SoftLibrary you need is not available, please contact your system administrator to have it added.*

Within a program, you can have one or more P2P callouts, one or more P2L callouts or any combination of P2P and P2L callouts. There is no limit to the number of callouts you can use.

Navigating to Callouts

1. Navigate to the subline→folder→program→program version where you want to map a callout.
2. Right click it and select **Map Callouts** from the popup menu.

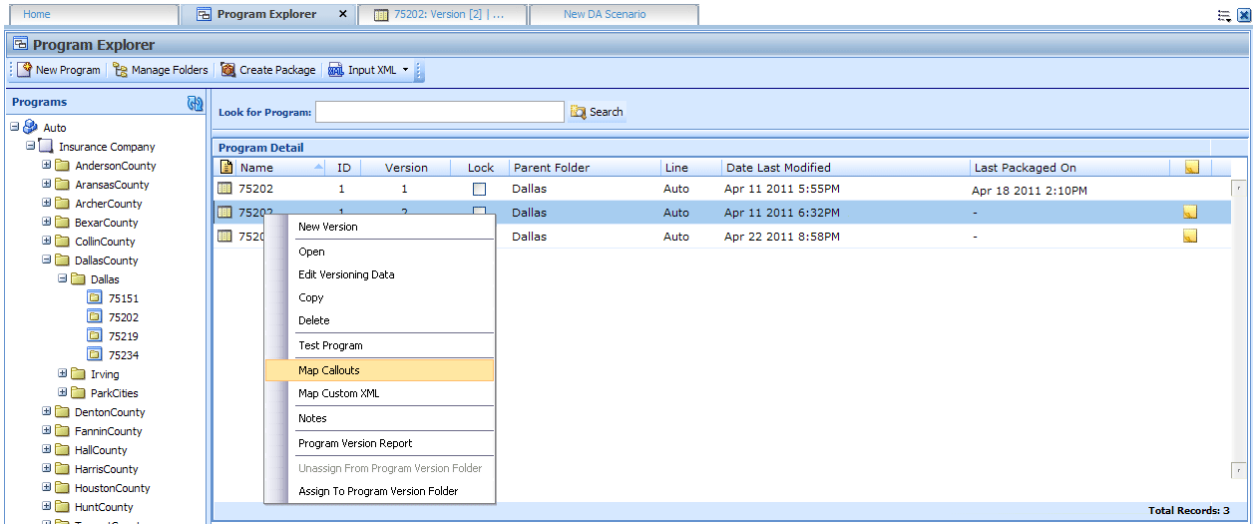


Figure 207 Navigating to Callouts

3. The Map Callouts screen will be displayed. If any callouts have been configured, they will be listed.

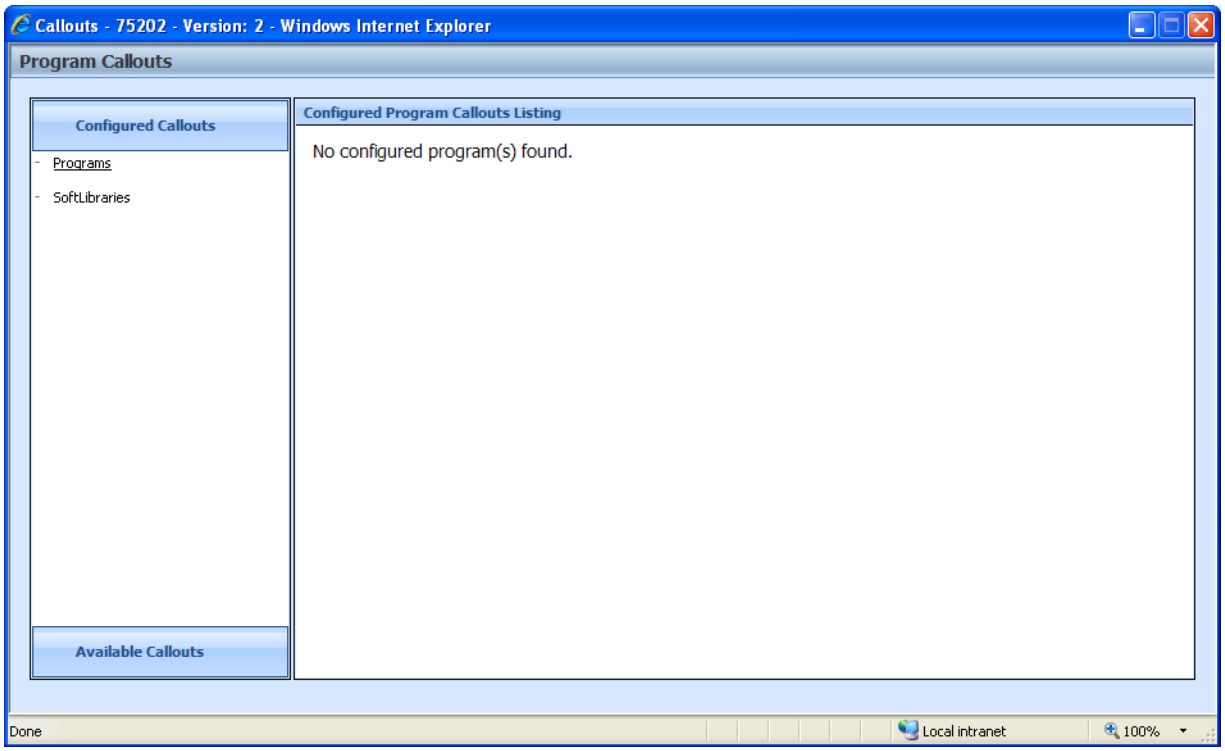


Figure 208 Map Callouts

FUNCTIONALITY

This screen does not have a Menu Bar.

FIELDS

There are three areas on the Program Callout screen.

- **Configured Callouts:** The configured callouts area contains links that display a listing of all the programs and SoftLibraries that have been added to this program version.
- **Available Callouts:** The available callouts area contains links that display a listing of all the program and SoftLibraries that are available to be added to this program version.
- **Configured Callouts Listing:** The configured callouts listing area contains a listing of all the program and SoftLibraries that have been added to this program version.

Configured Callouts

The configured callouts area contains two links, Programs and SoftLibraries. The underlined link indicates the current selection. Clicking a link will display a list of all the programs or SoftLibraries that have been added to this program version. Callouts are program version specific. The programs and SoftLibraries you select for this version will not populate any other version.

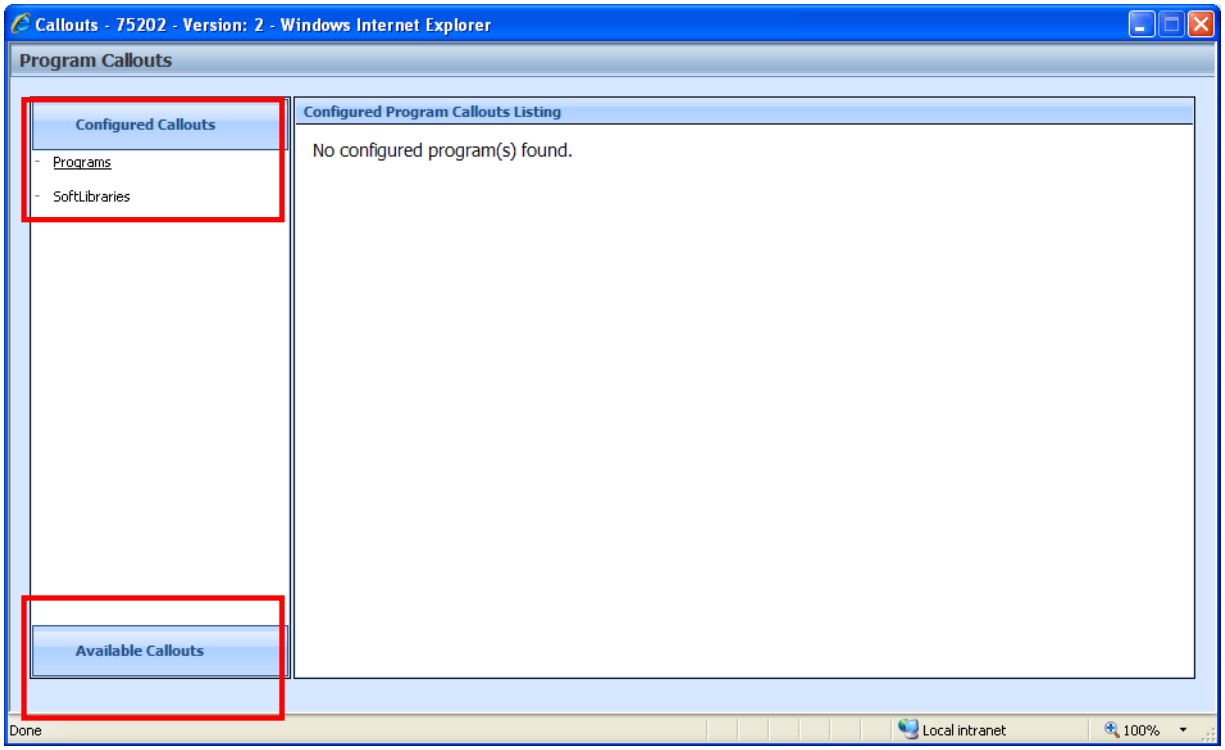


Figure 209 Configured Callouts

Only the programs and libraries for this program version will be listed here. Select the link where you want view the contents.

- **Programs:** A list of all the programs that have been selected. Links for input and output mappings will be available as well as a link to remove the program from the available callouts listing.
- **SoftLibraries:** A list of all the SoftLibraries that have been selected. Links for input and output mappings will be available as well as a link to remove the SoftLibrary from the available callouts listing.

Available Callouts

On the bottom of the screen is the Available Callouts area. The available callouts area contains two links, Programs and SoftLibraries. Clicking a link will display a list of all the program or SoftLibraries that are available to be added to this program version.

To view the available programs and libraries, click Available Callouts. The screen will expand to show the programs and libraries that can be added to this program version.

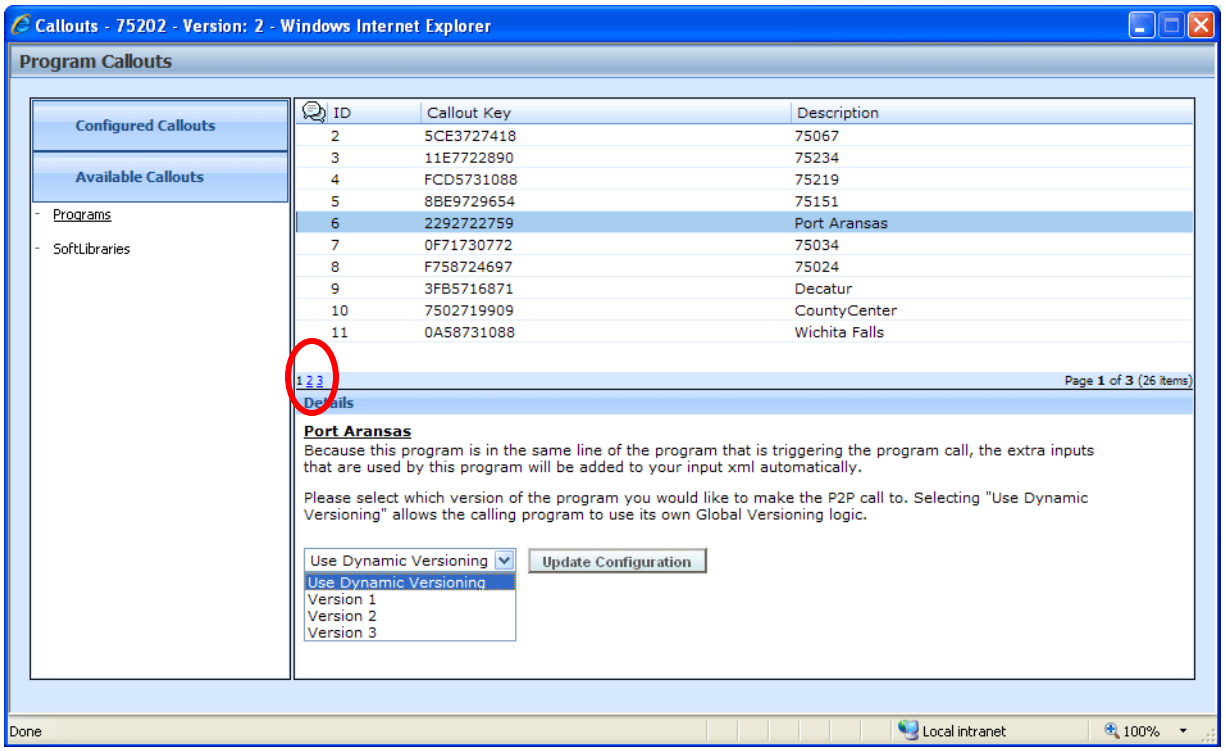


Figure 210 Available Callouts

Only the programs and libraries that are available for this program version will be listed here. Select the link where you want view the contents.

- **Programs:** A listing of all the programs that can be selected. The programs listed will be all programs within the subline. This will include programs that are packaged, not packaged or even completed.
- **SoftLibraries:** A listing of all the SoftLibraries that can be selected. SoftLibraries must be entered in IBFA prior to being displayed here.

Fields

Selection: A check mark in this field indicates that this program or SoftLibrary has been selected.

ID: The program XML ID number for the callout. This is not the program XML ID.

Callout Key: A key number used by the IBRU system.

Description: The name of the program.

Paging: You can page through the listing using the page numbers found in the lower left hand corner of the listing.

Details

Program or SoftLibrary information will be populated in the lower portion of the screen after you have selected it.

For Programs: A program version can be selected or the default versioning can be used. The default is to *Use Dynamic Versioning*. Dynamic Versioning allows the calling program to use the Global Versioning logic of the program being called. Global Versioning logic uses the program versioning criteria to determine which program version should be used by the program being called. Dynamic versioning on the program being called will use the input values it receives from the calling program. This allows the calling program to manipulate the input values used in dynamic versioning in an effort to rate against different versions of the same called program.

If Global versions logic has not been setup in the calling program, the last packaged program version will be used.

Configured Callouts Listing

The configured callout listing area will be populated with your selections. From this screen you can create mappings.

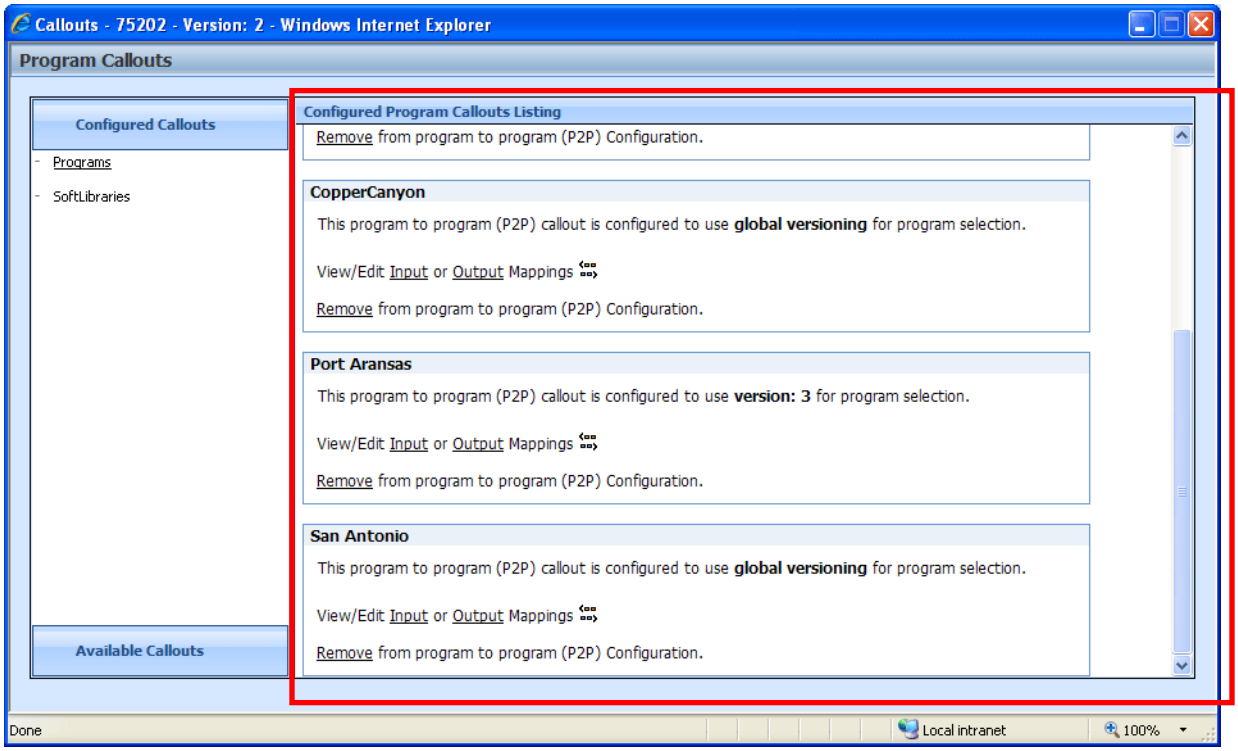


Figure 211 Configured Program Callouts Listing

CREATING A CALLOUT

You create Callouts by selecting the program or library that you want to run and then mapping the input, output and result variables. At this time, the driver/vehicle category found in Drivers Assignments cannot be mapped.

If you choose to have multiple programs in an algorithm, please be aware that a program cannot make a callout back to the initiating program. This is circular logic and will result in an error.

The Mapping Callouts option is available on Program Explorer→Program Version, right click menu.

For callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made. Callouts are program version specific and will be available in local algorithms and driver assignments only.

To Create a P2P Callout

1. Select the program(s) you want to add.
2. Verify your selections.
3. Map the program(s).
4. Add the program(s) to an algorithm or driver assignment.

To Create a P2L Callout

1. Select the library(s) you want to add.
2. Verify your selections.
3. Map the library(s).
4. Add the library(s) to an algorithm or driver assignment.

Step 1: Selecting Programs

1. On the **Available Callouts** screen, select the **Programs** link. The available programs for that subline will be listed in the description area to the right.

NOTE: *The Program Version you are currently working from will not be listed.*

2. Double click the **Program** you want to add to the callout. The details of the program will be listed in the **Details** area underneath.

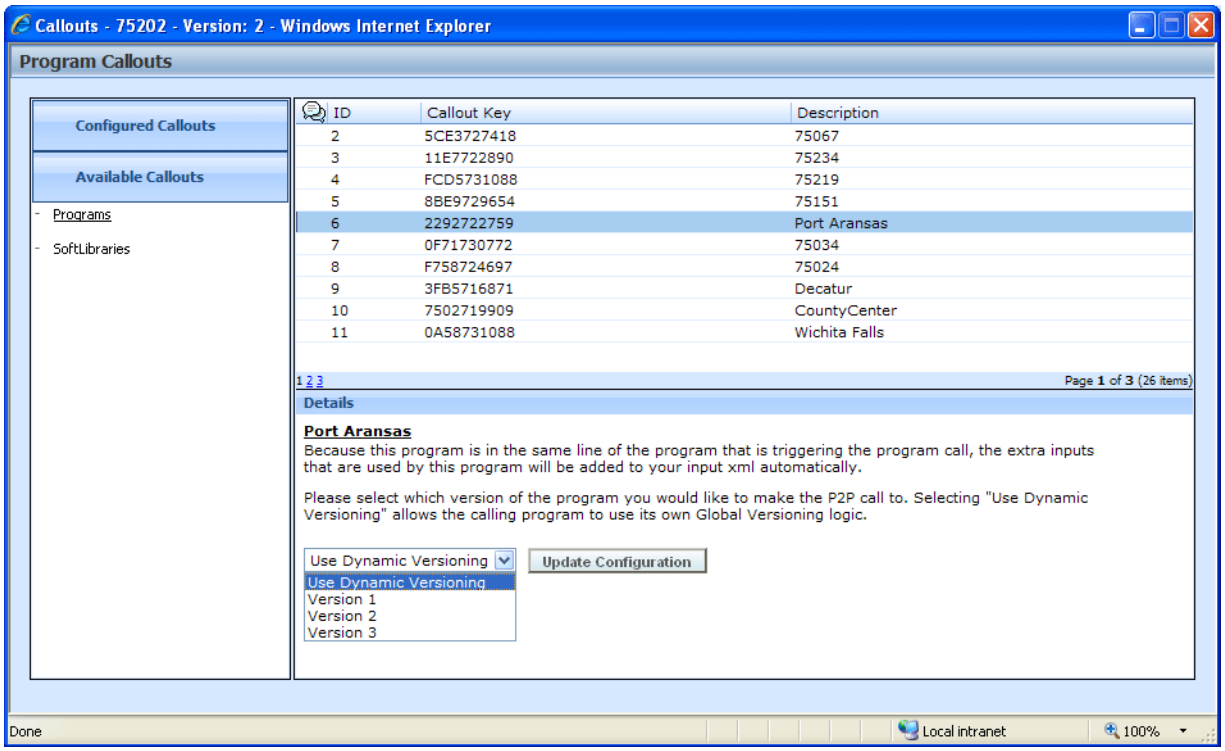


Figure 212 Verifying Callouts

3. The default versioning is Use Dynamic Versioning. This allows the calling program to use Global Versioning logic. If you want to use another version of the program, select it from the drop down menu in the **Details** area.

4. To add the program, click **UPDATE CONFIGURATION**. The screen will refresh with the correct information.

NOTE: *If Update Configuration is grayed out,* *the program has been added to the callout. Anytime you update the version, Update Configuration will be visible and you must run the update to add the selected version to the callout.*

5. Add in as many programs as you need.

NOTE: *A program that is selected for the callout will have a ✔ symbol in front of it. Programs can be removed from the Configured Callouts tab only.*

Step 1: Selecting SoftLibraries

To create a P2L you need to add the SoftLibraries. If you do not have any SoftLibraries to add in, you can proceed directly to mapping the inputs and outputs. See Mapping Callout Inputs and Outputs.

1. From the **Available Callouts** tab, select the **SoftLibraries** link. The available SoftLibraries will be listed in the description area to the right.

2. To add the SoftLibrary, scroll to the bottom of the detail screen and click **UPDATE CONFIGURATION**. The screen will refresh with a ✔ next to the SoftLibrary you just added.

3. Add in as many SoftLibraries as you need.

Step 2: Verifying your Selections

Before mapping, you should verify your selections. Programs can be added, removed or have version changes, SoftLibraries can be either added or removed.

1. Click the **Configured Callouts** tab. Select the **Programs** link. The programs you have selected will be listed in the description area to the right. Check to make sure you have the correct version. If you want to remove a program, click the **Remove** link. The program will be removed.

2. Next, select the **SoftLibraries** link. The SoftLibraries you have selected will be listed in the description area to the right. If you want to remove a SoftLibrary, click the **Remove** link. The SoftLibrary will be removed.

For more on deleting programs and SoftLibraries, see Removing a Program or SoftLibrary.

Editing a Program

If you need to select another version of a program, click the Available Callouts tab. Click the Programs link. Your selected programs will be displayed to the right. Double click the program you want to change. The details will be displayed below. Select the version you want and click Update Configuration to add this program version to the callout.

MAPPING CALLOUTS

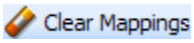
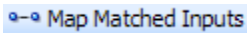
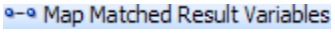
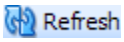
Mapping must be performed for the callout to run successfully. At this time, the driver/vehicle category found in Drivers Assignments cannot be mapped.

You must set the Input and Output mappings for each program and each SoftLibrary selected.

FUNCTIONALITY

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

Functions:

	**Clear Mappings:**
	Save: Saves the mapping.
	**Map Matched Inputs:** Creates a new step in the algorithm. For more information, see Working with Steps. **NOTE:** *For Input Mapping Only.*
	**Map Matched Result Variables:** Creates a new step in the algorithm. For more information, see Working with Steps. **NOTE:** *For Output Mapping Only*.
	**Refresh:** Deletes the currently selected step. You cannot delete the last step of an algorithm.
	Change Step Order: Allows users to change the order of the steps without using the drop and drag feature.
	Advanced Options: Opens up the advanced options screen.

Selecting Categories on Mapping Inputs

You can select the categories you want to map using the category field at the top of the screen.

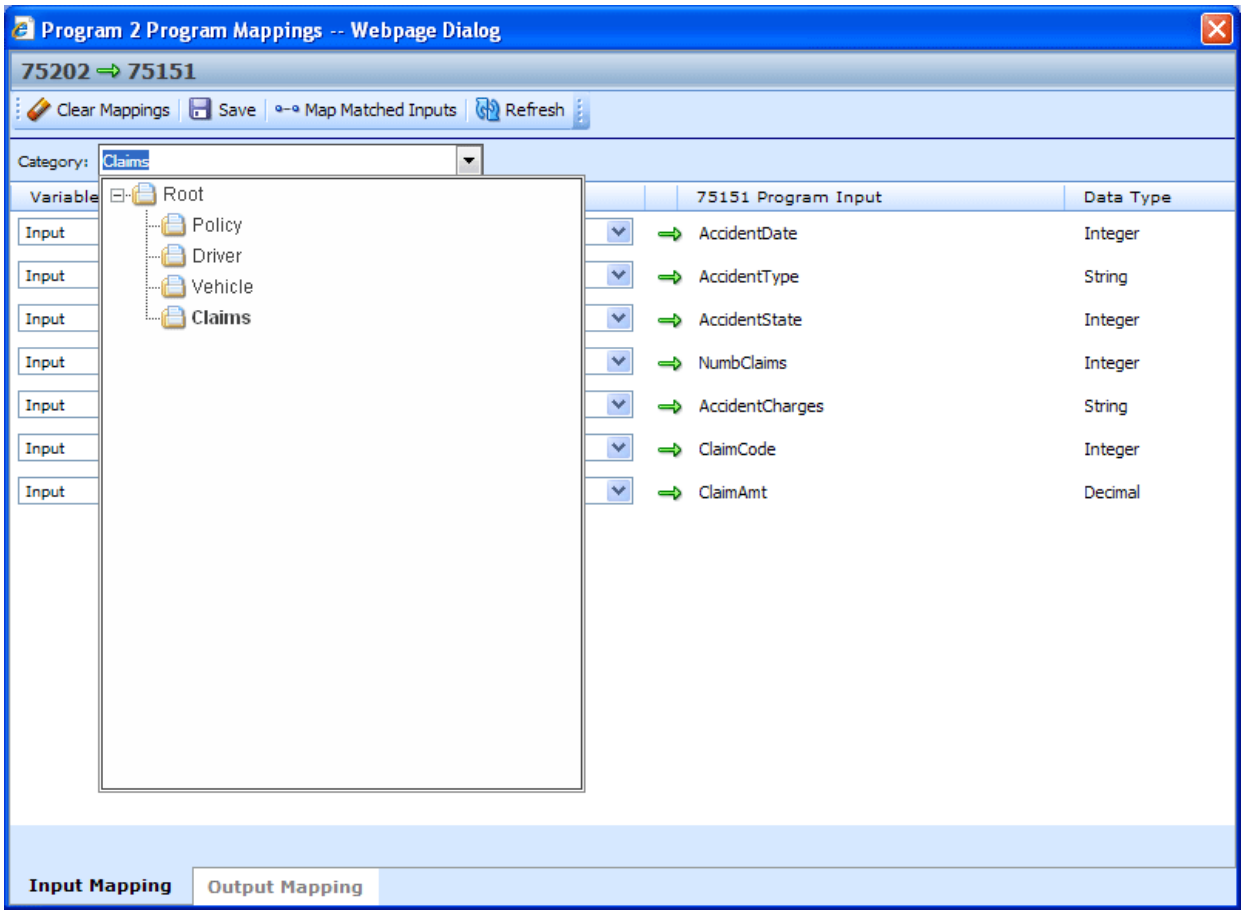


Figure 213 Mapped Callouts Screen

Searching on Mapping Outputs

You can search for result variables on the SoftLibrary mapping screens.

Enter in your search criteria in the search window. Select if you want to search all variables or only table variables.

Results will be displayed in the left hand side of the screen.

Step 3: Mapping a P2P Callout

1. From the Configured Callouts tab, click the Mapping link . A separate screen will be displayed. You will be placed on the Input Mapping screen first.

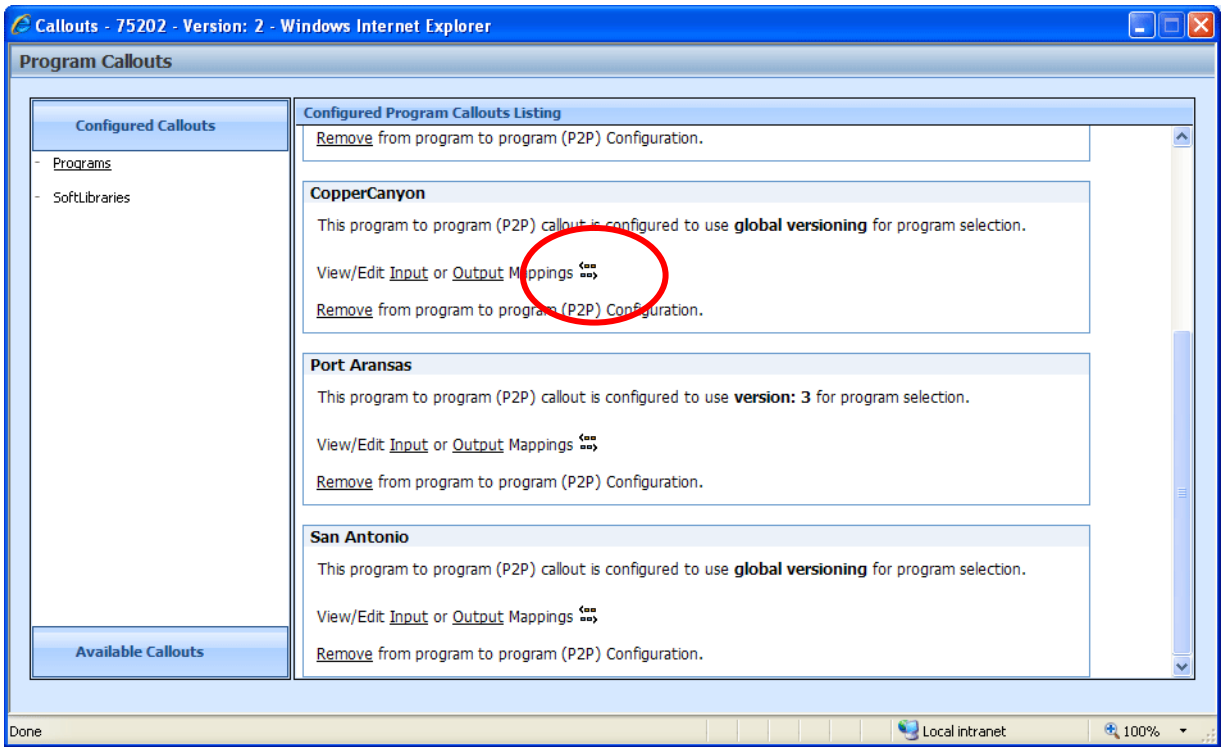


Figure 214 Mapping Callout Selections

2. There are two ways to map inputs.

    a. First select the category you want to map from the drop down menu at the top. Next, select the variable type and corresponding program variable from the drop down menus. After you have made your selections, you can view your entries by clicking **REFRESH**.

    b. You can click **MAP MATCHED INPUTS** to automatically map the matching inputs.

NOTE: *While it is not required, it is recommended that the policy category be mapped first. Mapping policy variables to program equivalents before you map other categories assures that your policy inputs have the closest possible match.*

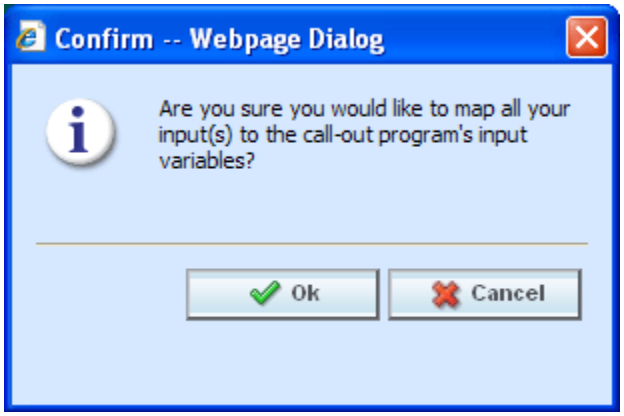


Figure 215 Mapping Inputs

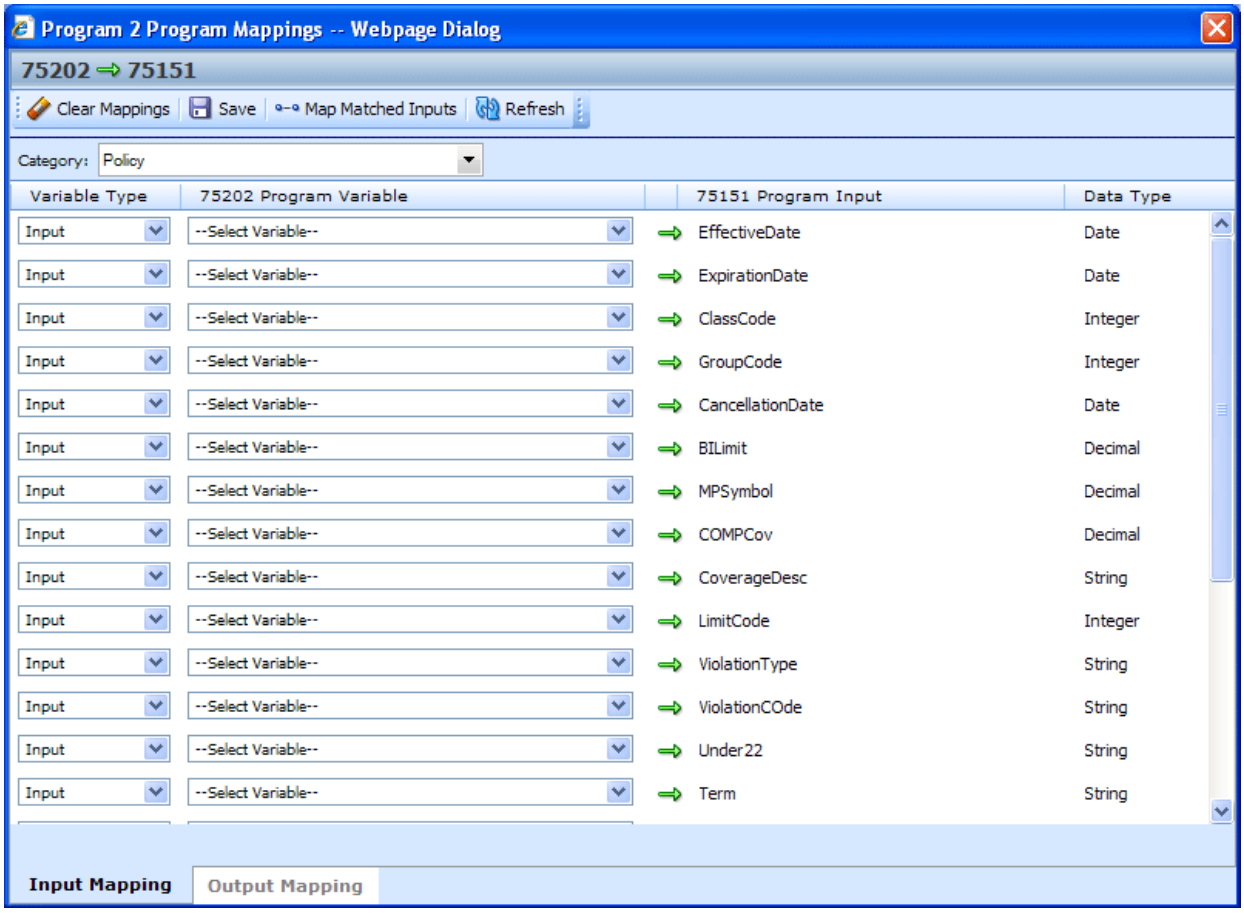


Figure 216 Mapping Inputs

NOTE: *At any time you can clear all mappings by clicking **CLEAR**. This action cannot be undone. Make sure this is the action you want to take.*

3. Verify your mappings. If they are correct, click **SAVE** to save your entries.
4. Select the **Output Mapping** tab at the bottom of the screen. This will open up the output mapping screen where you can map variables to results that are used.

Creating a New Result Variable

You can create a new result variable at any time. Select **New Result Variable** from the drop down menu options in the Program Variable column.

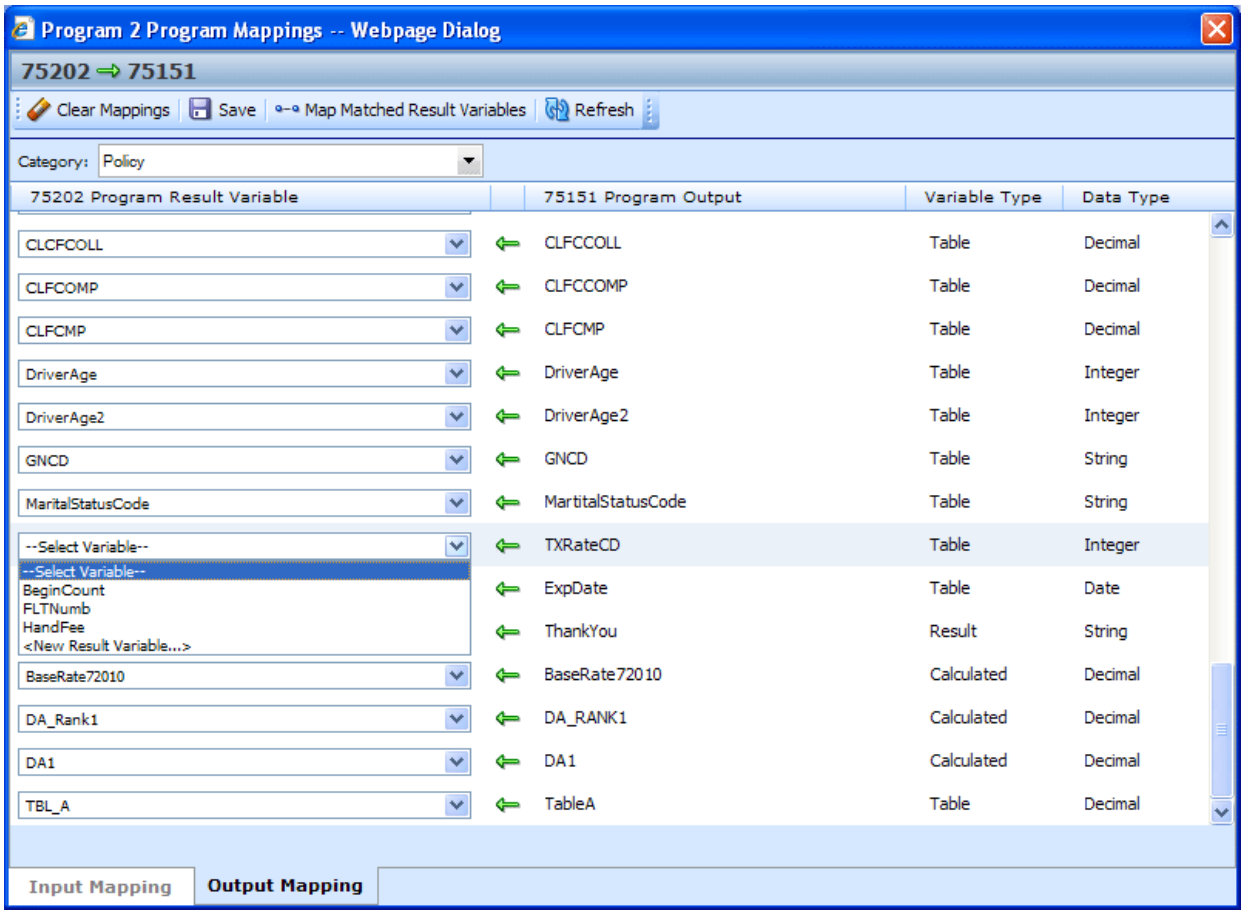


Figure 217 Mapping Outputs

5. There are two ways to map result variables.

    c. First select the category you want to map from the drop down menu at the top. Next, select the result variable from the drop down menus. After you have made your selections, you can view your entries by clicking REFRESH.

    d. You can click MAP **MATCHED RESULT VARIABLES** to automatically map the matching results variables.

6. Do this for all result variables that you need mapped in every category.

7. Click **SAVE** to save your entries.

8. Close the Mappings screen. You will be returned to the Callouts screen. Your mappings will be in place.

NOTE: *At any time you can clear all mappings by clicking **CLEAR**. This action cannot be undone. Make sure this is the action you want to take.*

Step 3: Mapping SoftLibraries

If you have any SoftLibraries, you will need to map them. It is recommended that you begin at the policy level.

1. From the Configured Callouts tab, select the **SoftLibraries** link. Click the Mapping link . A separate screen will be displayed. You will be placed on the Input Mapping screen first.

2. Select the category from the drop down menu at the top of the screen.

3. Enter in the input mapping path. Highlight the corresponding category in the library Custom XML field. Drag the category into the path field.

4. Enter in the mappings. Highlight the corresponding mapping field in the library Custom XML area. Drag the mapping into the mapping field.

5. Enter as many fields as you need. If your fields do not populate the screen immediately, you can view your entries by clicking REFRESH.

6. When complete, select the **Output Mapping** tab at the bottom of the screen. This will open up the output mapping screen where you can map variable to results that are used.

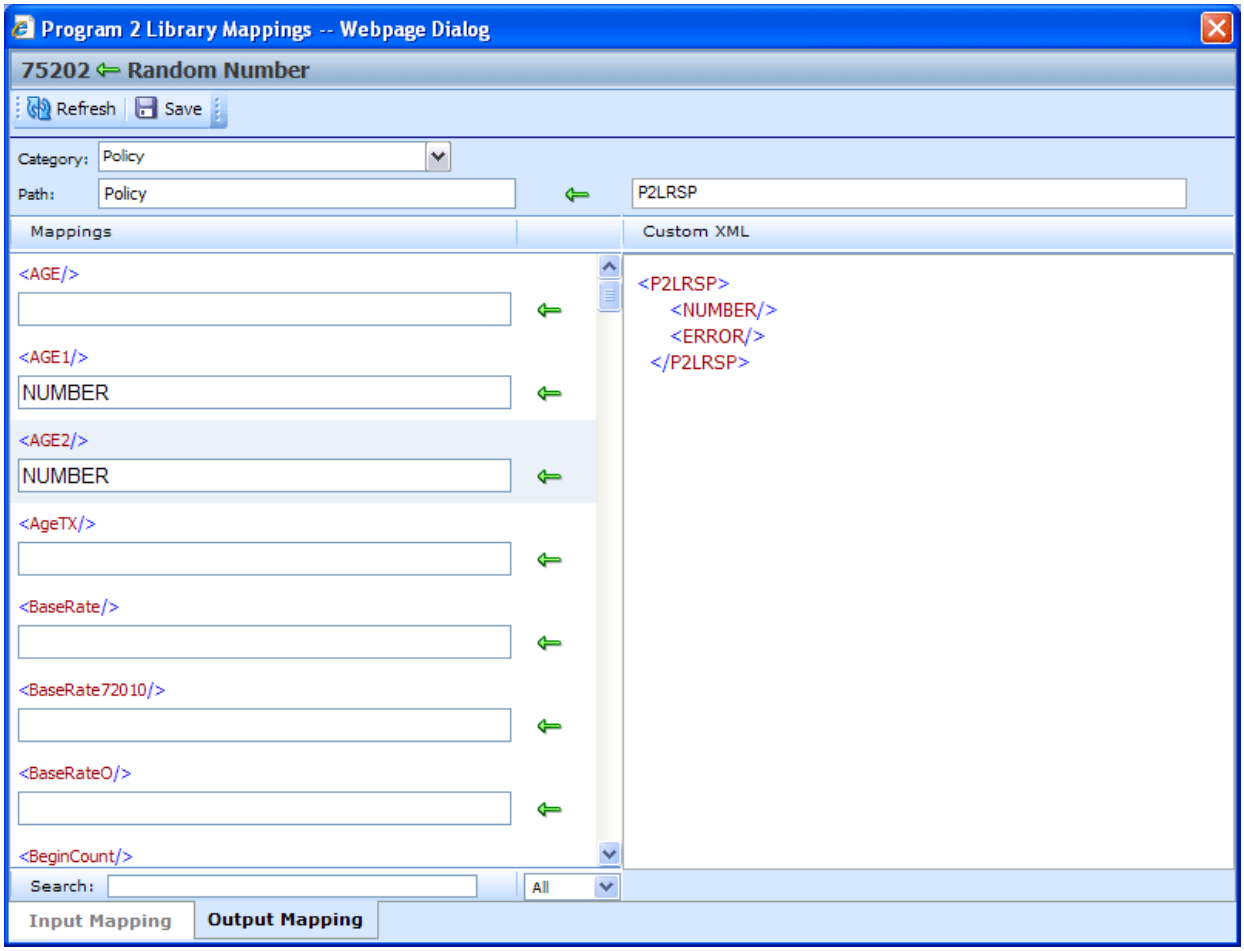


Figure 218 SoftLibrary Output Mappings

7. Select the category from the drop down menu at the top of the screen.

8. Enter in the output mapping path. Highlight the corresponding category in the library Custom XML field. Drag the category into the path field.

9. Enter in the mappings. Highlight the corresponding mapping field in the library Custom XML area. Drag the mapping into the mapping field.

10. Enter as many fields as you need. If your fields do not populate the screen immediately, you can view your entries by clicking REFRESH.

11. Verify your mappings. If they are correct, click **SAVE** to save your entries.

12. Close the Mappings screen. You will be returned to the Callouts screen. Your mappings will be in place.

13. Close the callout screen to return to the **Program Details** tab. Your callout is now ready to use.

Removing a Program or SoftLibrary

Programs and SoftLibraries can be deleted from a callout at any time. If you remove a program or SoftLibrary you are removing all associated mappings as well.

1. Navigate to the callouts screen.

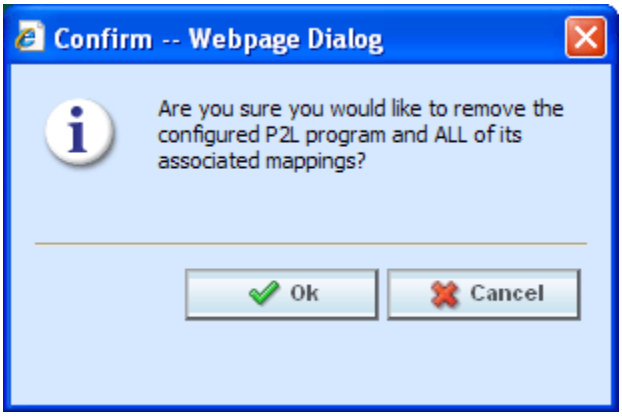


Figure 219 Deleting a Callout

2. Select the program or SoftLibrary you want to remove.

3. Click the **Remove** link. A warning message will be displayed. Select **OK** to remove the callout, click **Cancel** to return to the previous screen without deleting the callout.

Copied or Versioned Programs

Callouts are version specific and function at the version level. When you create a new version or copy a version, the P2P mappings are the same ones as the version where they were created. You may want to adjust these mappings to reflect any changes you are making to the copied or versioned program.

When a change is made to a callout, the change will only be in version where the callout was updated. On copied or versioned programs only, P2P callouts should be verified to make sure the mappings that were brought over are the ones you want.

P2L mappings will not get brought over into the new version. SoftLibraries must be re-registered.

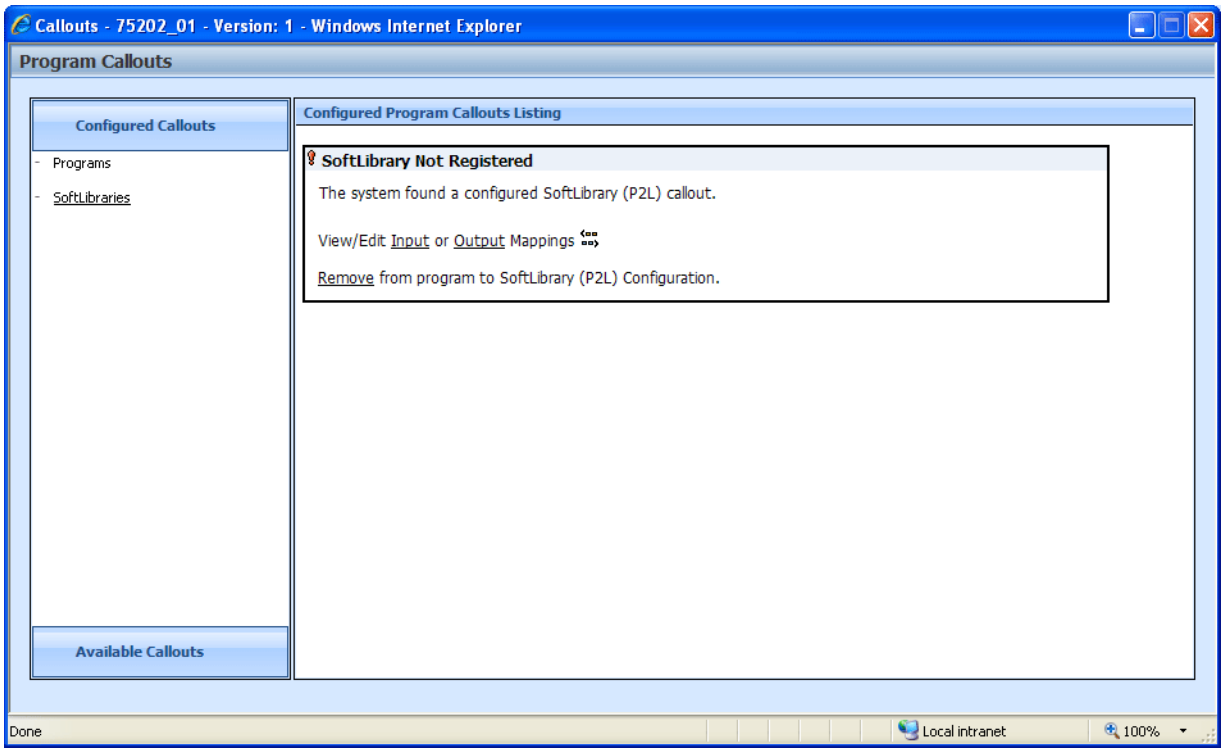


Figure 220 SoftLibrary that is Not Registered

If you enter a copied or versioned program and see an error message on your P2L, you will need to re-register the library.

To Re-Register a library

1. It is recommended that the callout to be deleted from the algorithm or driver assignment prior to the SoftLibrary being re-registered. This will assure a proper connection for the library.
2. Remove the unregistered library from the Configured Callouts screen.
3. On the Available Callouts area, select the library you need.
4. On the Configured Callouts area, enter in the mapping. This will re-register the library properly.
5. The P2L can be used an algorithm or driver assignment.

Step 4: Implementing Callouts

After creating a callout, you can select it when creating or editing steps for algorithms. Callouts are useful when you need to call an external data provider, such as the motor vehicle office, replacement costs calculators or credit reports. For example, you can place a callout in an algorithm so that the call is placed only after certain criteria have been met. This assures that the call is made against a risk that is more likely to qualify instead of a risk that may not meet the requirements.

You can also use a callout to access an internal database or internal process. Some insurers have central repository of data or applications that are shared company wide. Instead of loading this information into RateManager, a callout can be made from RateManager to obtain the information.

Callouts will be listed under Functions: Program Callouts or Functions: Library Callouts. Choose the type of callout you want. The available programs or SoftLibraries will be populated underneath. Select the callout you want.

For subline specific callouts, step types will not matter. The entire step will consist of the callout. No other entry can be made. Callout selections will be available under the subline they were created in.

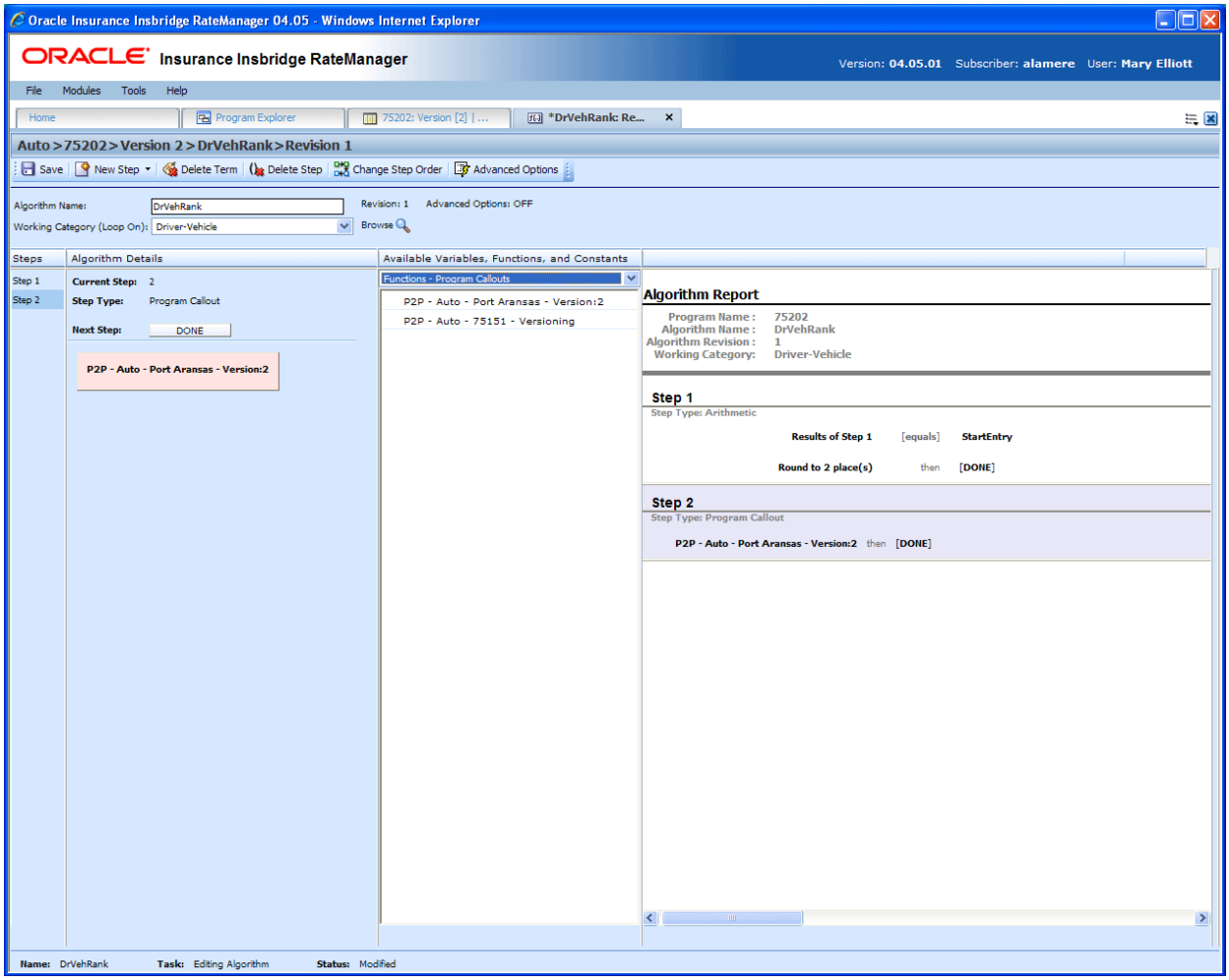


Figure 221 Implementing a Callout

Chapter 19

WORKING WITH REVISIONS

Element revisions can be created in both standard programs and in template generated programs, unless locked, at any time. Only unlocked elements can have new revisions added. In standard program revisions, all elements will be open for editing. If a variable is locked, you can copy it and then make a new revision from the copy.

When you create a new element revision, it gets created in all versions of the program. Global and local elements are created, edited, copied, and deleted in the same way. Global and local elements are also revisioned in the same way.

Input and Result variables do not have revisions.

Creating an Element Revision

The new revision will be created as the next available revision number and the listing will refresh. The program will not use the new revision until it is set as the active revision. For table variables you may get a confirmation box asking you if you would like to include any data found. You will have to select yes or no to continue.

To Create an Element Revision

1. Navigate to the **Program Details** tab for the program version that contains the element where you want to create a new revision.
2. Select the element you would like and right click. Select **Show/Hide Revisions** from the popup menu.

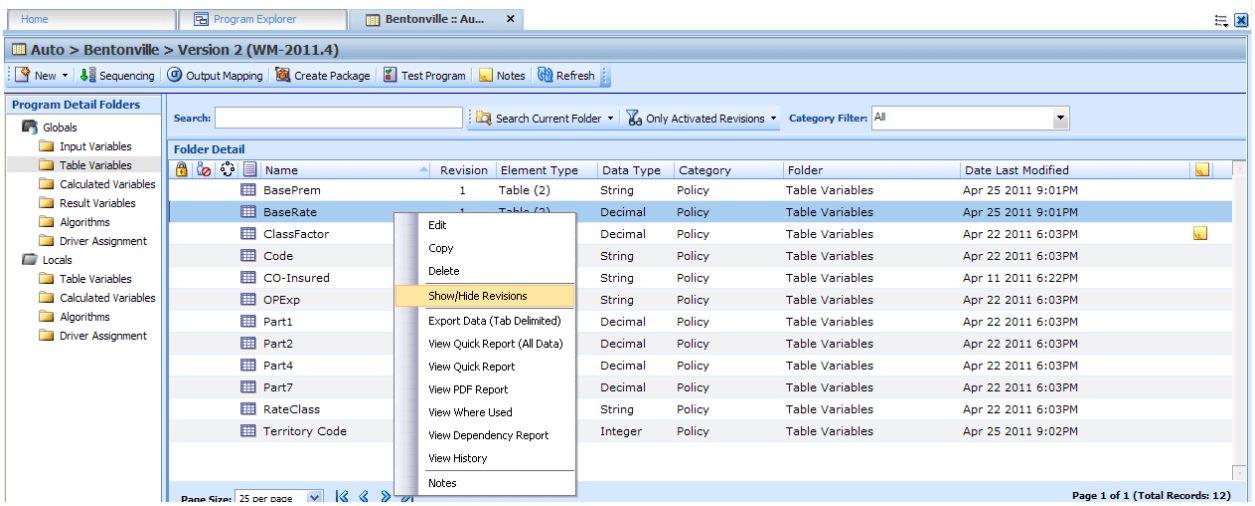


Figure 222 Selecting a Variable to Revise

3. Select the revision you would like the new revision based on and right click it. Select **New**

Revision from the popup menu. The new revision will contain the same information as the revision you select to base it on. If Change Control has been turned on, you will need to enter that information first.

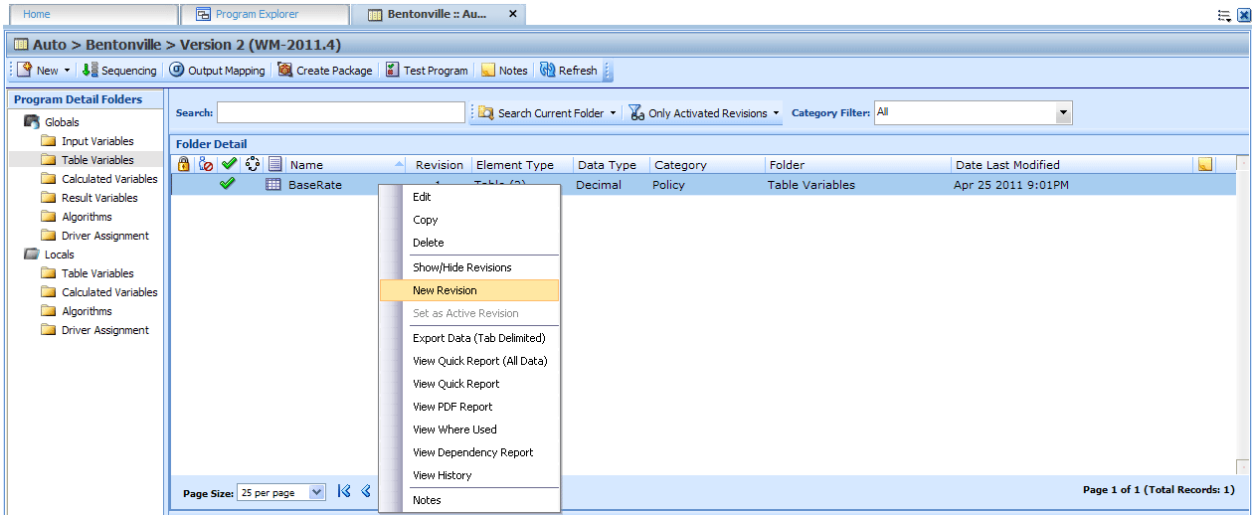


Figure 223 Revising a Variable

4. The new revision will be created as the next available revision number and the program details tab listing will refresh. The new revision will be open for editing.

You can create as many revisions as you need. You can create a new revision when you want to update an element. By creating a new revision for updates, you leave the last revision intact. This may be helpful if you want to "rollback" to a previous revision or make any comparisons.

NOTE: *You also can enter notes to any element. Notes may be helpful in keeping track of updates that have been made.*

Changing the Active Revision of an Element

Once you have created a new revision, you can set it as the revision that will be used during rating. There can be only one active revision in a program version. Changing the active revision in one version of a program does not set it as the active revision for other versions of the program.

The active revision can be changed on both unlocked standard programs and unlocked template generated programs. On a template generated program, if you change the revision from a template generated revision to a revision that you created, the variable will be open for editing. If you change back to the template generated revision, the variable will be locked and no longer open for editing.

The active revision is indicated by the green checkmark.

The default active revision is revision 1. If there is another revision that you want to use, go into the program details tab and set the revision there.

To Change the Active Revision of an Element

1. Navigate to the **Program Details** tab of the program that contains the element where you want to change the active revision.

2. Select the element you would like to change the active revision for and right click it. Select **Show/Hide Revisions** from the popup menu.

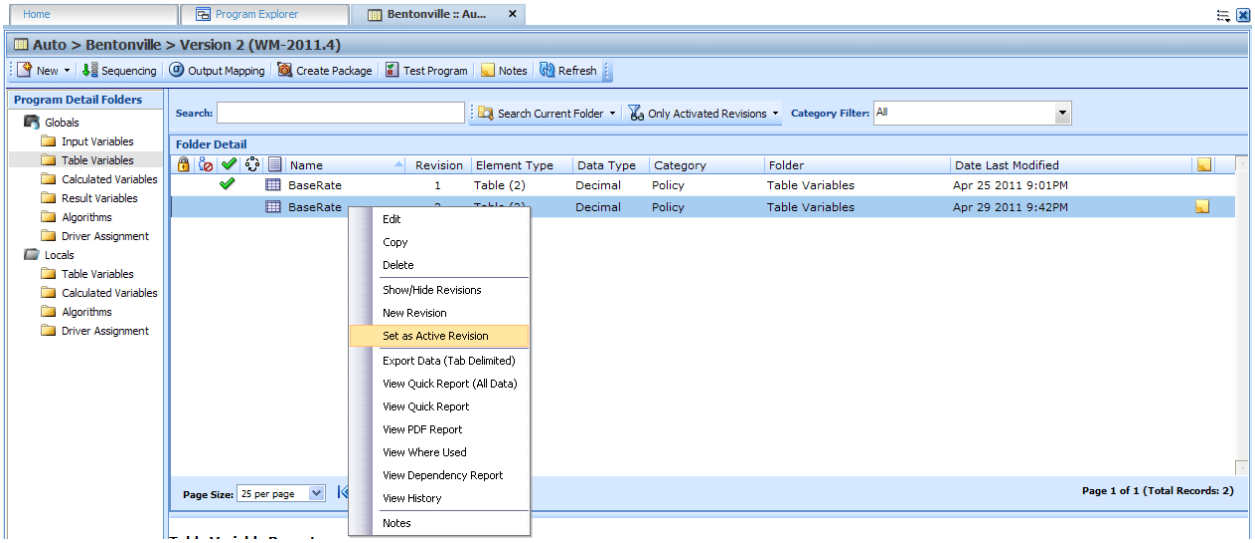


Figure 224 Selecting an Active Revision

3. Select the revision you would like to make the active revision and right click. Select **SET AS ACTIVE REVISION**.

4. You will be asked to confirm changing the active revision.

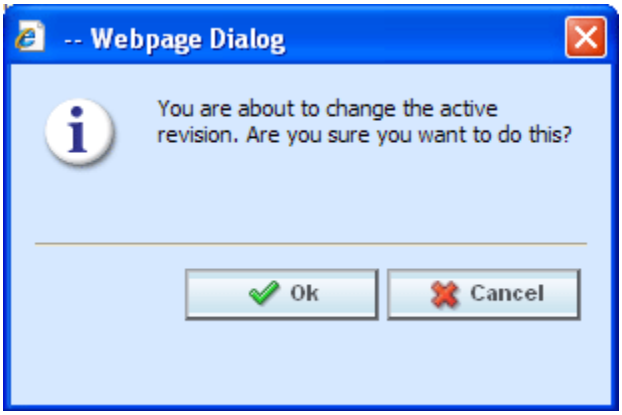


Figure 225 Confirmation Message

5. Select **Ok** to change the active revision and refresh the tab. Select **Cancel** to return to the Program Details tab.

6. On the Program Details tab, the new revision will have the green checkmark ✔ in front.

Deleting an Element Revision

When a revision is no longer needed, it can either be left in RateManager or deleted. Linked variables, active revisions and template generated revisions cannot be deleted. When you delete a revision, it gets deleted from all versions of the program. If you are uncertain as to whether the revision will be used again, you can leave it in. This will save time if the revision is needed and will not slow down rating.

To Delete an Element Revision

1. Navigate to the **Program Details** tab of the program that contains element where you want to delete a revision.
2. Select the element that contains the revision you would like to delete and right click it. Select **Show/Hide Revisions** from the popup menu.
3. Select the revision you would like to delete and right click it. Select **DELETE** from the popup menu.
4. You will be asked to confirm the deletion of the element revision.

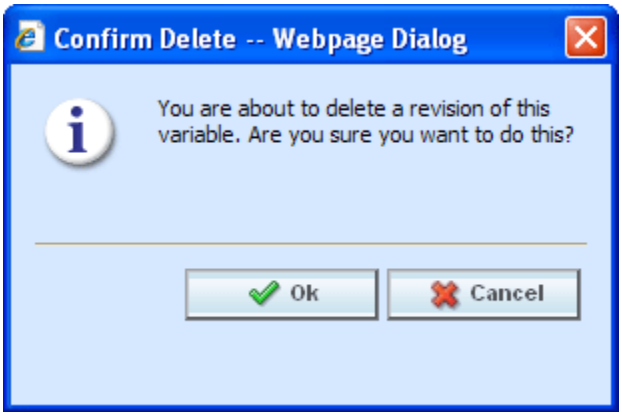


Figure 226 Deleting a Revision

5. Select **Ok** to delete the element revision and refresh the program details tab listing. Select **Cancel** to return to the Program Details tab.

   If you try to delete the activated revision for the current program version, you will receive an error message instructing you to activate another revision and try again.

If you try to delete a linked variable, you will receive an error message informing you that linked variables cannot be deleted. You can delete the entire variable if necessary.

Chapter 20

INTRODUCTION TO SEQUENCING

Sequencing allows you to activate and order algorithms and underwriting rules. After creating your algorithms, you need to set the order in which they should run. For example, if you had a Total Premium algorithm that was calculated from the sum of BI Premium, PD Premium, MP Premium, Comp Premium and Coll Premium, you would want the Total Premium algorithm to run after all the other premiums had been calculated.

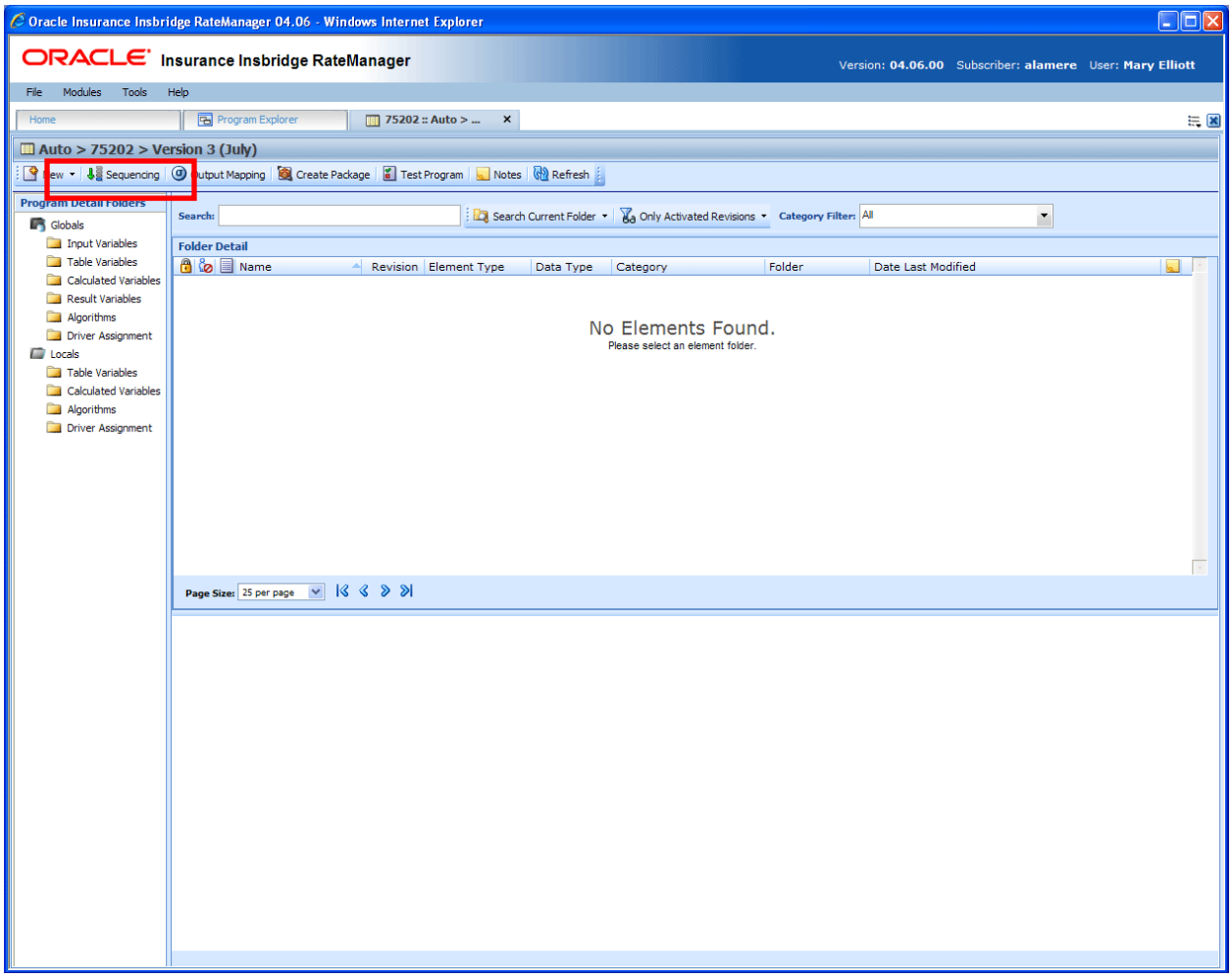


Figure 227 Navigating to Sequencing Tab

Navigating to Sequencing:

Sequences are program version specific and will not be an option on the Program Explorer tab or the Program Details tab. You must select the Subline→Folder→Program→Program Version where you want to view or manage sequences. This will open the Program Details tab where you can access the Sequencing tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.

2. Select the Line of Business→Subline→Program→Program Version. This will open the Program Details tab.

3. **Sequencing** is available from a button located on the menu bar. Click Sequencing to be placed on the Sequencing tab.

SEQUENCING TAB

The sequencing tab contains a listing of algorithms and driver assignment scenarios. To create a sequence, begin on the left hand side of the tab. Select the element you want to run first and click the Add button in the center of the tab. The element will be placed on the right side of the tab. Continue until you have all the elements you want to run in the order you want them to run.

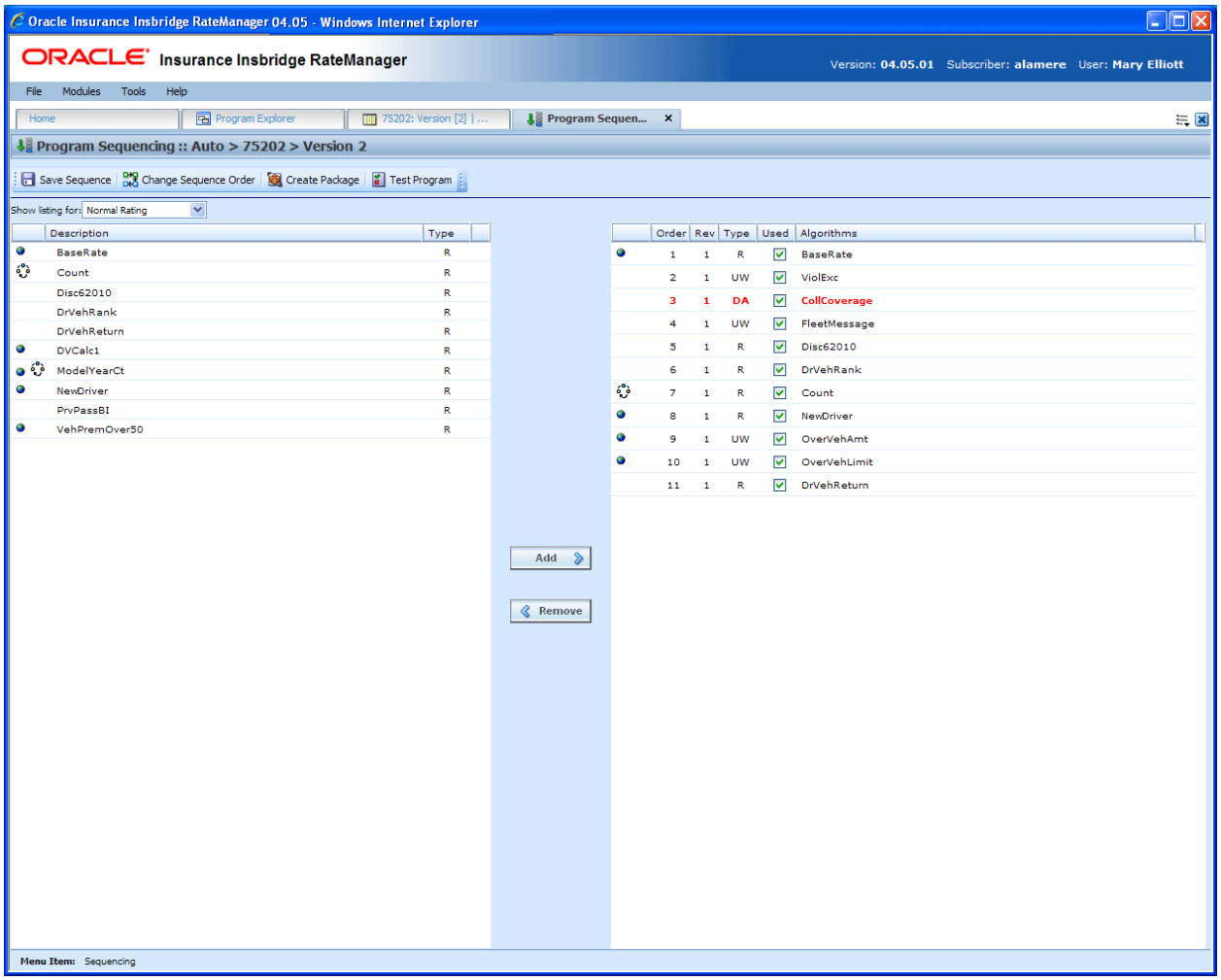


Figure 228 Sequencing Tab

- A globe icon is used to indicate a global element. If there is no icon in front, this element has been created at the local program level.

- An advanced option icon is used to indicate that an advanced option is contained in the element.
- Driver Assignments are listed in RED.

NOTE: *For an auto program, any algorithm that is sequenced before the red colored driver assignment scenario will run before drivers are assigned to vehicles.*

Functions:

Save Sequence	**Save Sequence:** Saves the Sequence. If you make a mistake while changing the sequence, you can select **Sequencing** from the menu tree in the left navigation pane to reload the last saved sequence.
Change Sequence Order	**Change Sequence Order:** Allows you to change the order of the sequences without using the drop and drag feature.
Create Package	**Create Package:** Packages the program for rating and testing. See Introduction to Packaging for more information.
Test Program	**Test Program:** Opens the Test Program, which allows you to test and debug a program within RateManager. See Introduction to the Test Program for more information.
Show listing for: Normal Rating	**Show Listing For:** Allows you to filter the list of available elements to show one of the following: • All • Normal Rating • Underwriting Rule • DA Scenarios - on the Auto LOB only

NOTE: *If you have made changes to your Sequence, but have not saved, RateManager will prompt you to save before allowing you to navigate to another tab.*

Column Sorting: You can sort algorithms by order number or algorithm column headers. The default view is numeric (lowest to highest) by Order number. To sort by a different column header, click the column header you want and the current results will be resorted. You can sort results as many times as you want.

Sorting does not filter results. It only rearranges the order in which they are displayed.

Algorithm/Driver Assignment Listings

The program sequencing screen is divided into two areas with two buttons in between.

- **Available Algorithms/Driver Assignments:** The default listing on the left side of the screen shows alphabetically all rating algorithms that have been created for this program version. If you want to view the underwriting rules or driver assignments, select your choice from the Show Listing For selection box.

- **Selected Algorithms/Driver Assignments:** The listing on the right side of the screen shows all algorithms that have been added to the sequencing and the order in which they will be executed.

- **Add:** Adds the selected algorithm or driver assignment from the list of available algorithms and driver assignments to the sequence. If the algorithm or driver assignment is already in the sequence, an error message will be displayed. Each algorithm and driver assignment can be added once.

- **Remove:** Removes the selected algorithm or driver assignment from the sequence.

NOTE: *You cannot remove the last algorithm from a sequence. All sequences must have at least one algorithm.*

Creating a Sequence

Sequences are program version specific. The sequence you create for version 1 will not be displayed for version 2. You will have to create a sequence for version 2. You can add as many algorithms and driver assignments as you need. The first algorithm you add to the selected column will be the first one executed, the second one added will be the second one executed and so on. You can change the order after you have made a sequence.

All algorithms and driver assignments listed are the active revision for that program version. The revision will be displayed on the left side of the screen in the **Rev** column. If the revision you need is not brought over, you must return to the program and change the active revision. The revision will be updated in the sequence.

All algorithms and driver assignments are active when brought into the sequence column. A green checkmark will be in the **Used** column. If you want to leave an algorithm in the sequencing, but do not want it executed, then remove the check next to the algorithm name.

Once a sequence has been created, it cannot be deleted, only changed.

1. To add an algorithm or driver assignment to the sequencing, you can either highlight it and click **ADD** or double-click the algorithm or driver assignment.

2. Once the algorithms and driver assignments are activated and sequenced, click **SAVE SEQUENCE** to save your work.

NOTE: *If you have created an algorithm or driver assignment and it does not appear in the list, be sure the Show Listing For selection box is set to filter correctly.*

Every algorithm and driver assignment created at the local program level and at the global level will be listed. You may not need some of these algorithms or driver assignments.

At least one input must be used in the program for each category in the sequence. Every algorithm is created with a working category. If you select an algorithm and list it in the sequence but do not have an input for the working category where that algorithm was created, then program will not package.

Changing Sequence Order

Any algorithm or driver assignment can be moved in the sequence order. Sequence order can be changed at any time. If you change sequence order after packaging, you will need to re-package in order for the sequence to be used when rating.

There are two ways to change the execution sequence: drop and drag or click **CHANGE SEQUENCE ORDER**.

To use the **drop and drag** method, highlight the algorithm or driver assignment you want to move, then drag it to the new location and drop it. If you want to move an algorithm farther up than you can see or farther down than you can see, you can use the keyboard's arrow keys or you mouse wheel (if so equipped) to move the scroll bar up or down, while dragging the algorithm.

CHANGE SEQUENCE ORDER:

1. Select the algorithm or driver assignment you want to move and click **CHANGE SEQUENCE ORDER**. A separate screen will be displayed.

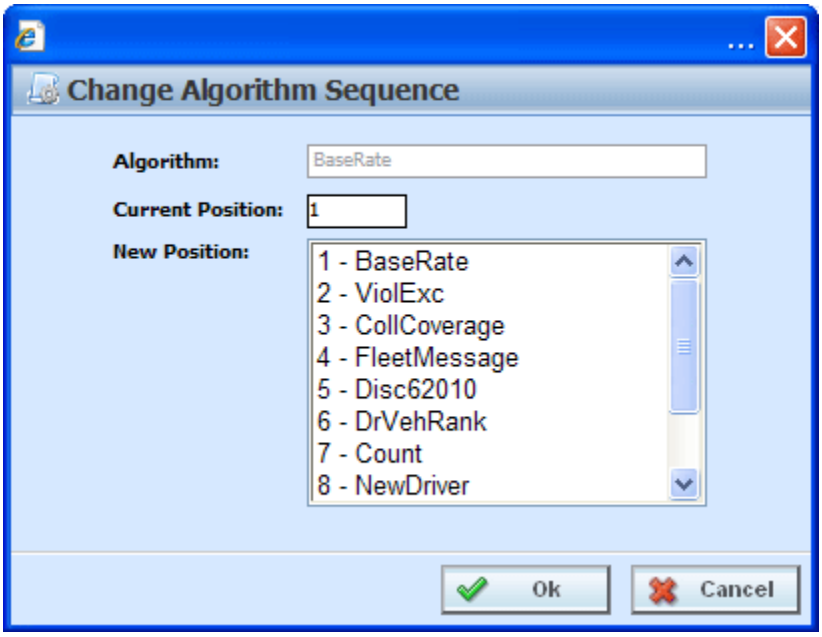


Figure 229 Change Sequence

2. The current position will be displayed at the top of the screen. Select where you want the algorithm or driver assignment to be placed.

3. Click **OK**. You will be returned to the program sequencing screen. Your algorithm or driver assignment should be placed where you chose.

Removing an Element from a Sequence

To remove an algorithm or driver assignment from the sequencing, highlight the element you want to remove and click REMOVE. The element will be removed from the selected list.

You cannot have a sequence without any algorithms or driver assignments. There will always be at least one algorithm or driver assignment. You will not be able to delete the last remaining algorithm or driver assignment.

WARNING: ***For an auto program, algorithms that use both driver and vehicle information must be sequenced to run after driver assignment***.

Chapter 21

OUTPUT MAPPING

The output mapping function allows you to select the results that you want displayed in the output file. Whether it is a result, input, table or calculated variable, global or local, there is no limit to the type or number of results you can set. Results are mapped to the rating output file based on how you want to view the data. This might include premiums, rating factors, driver ages, etc.

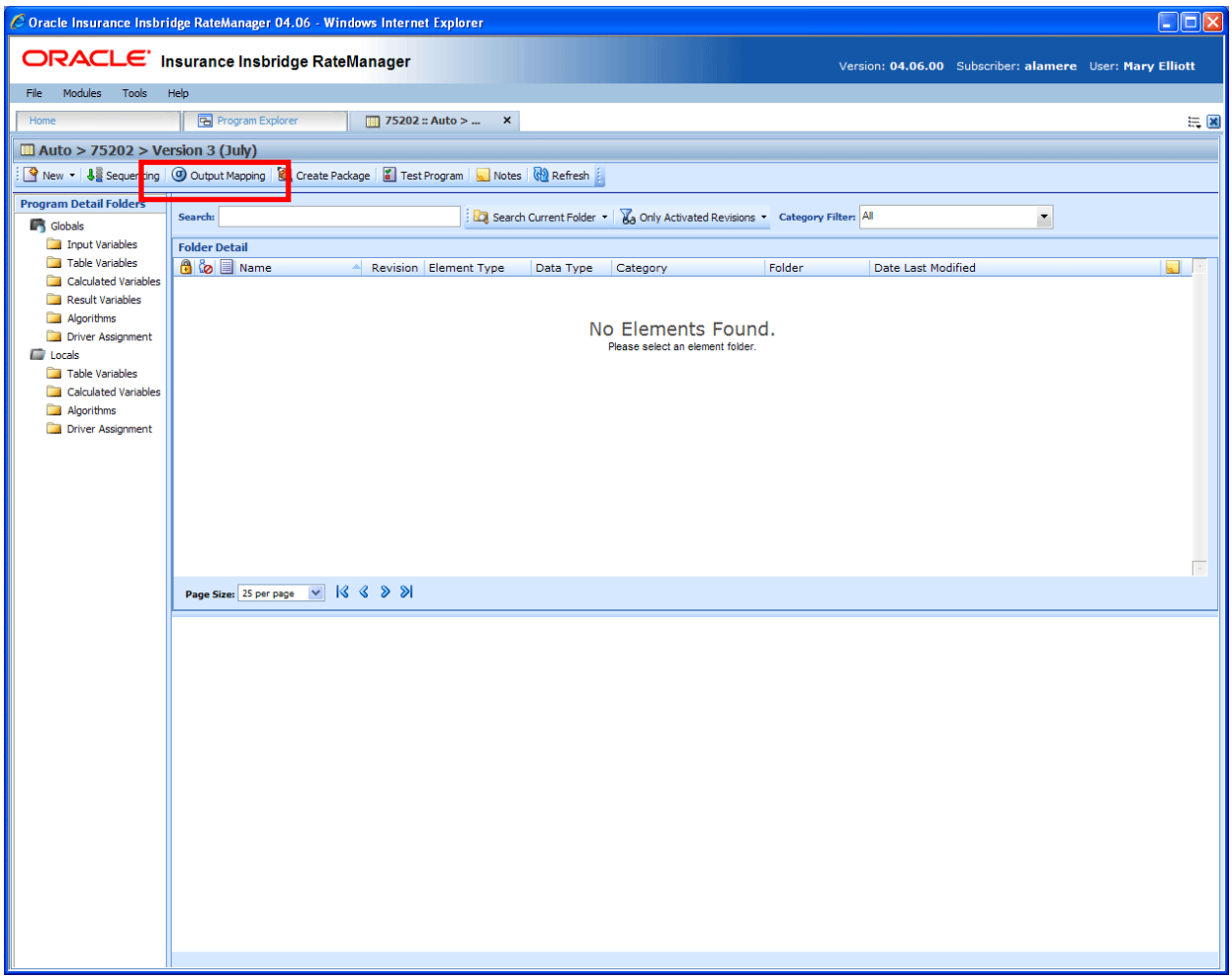


Figure 230 Navigating to Output Mapping Tab

Navigating to Output Mapping:

Output mappings are program version specific and will not be an option on the Program Explorer tab or the Program Details tab. You must select the Subline→Folder→Program→Program Version where you want to view or manage output mappings. This will open the Program Details tab where you can access the Output Mapping tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.

2. Select the Line of Business→Subline→Program→Program Version. This will open the Program Details tab.

3. **Output Mapping** is available from a button located on the menu bar. Click Output Mapping to be placed on the Output Mapping tab.

OUTPUT MAPPING TAB

The Output Mapping tab shows all the output groups that have been created for a particular program version.

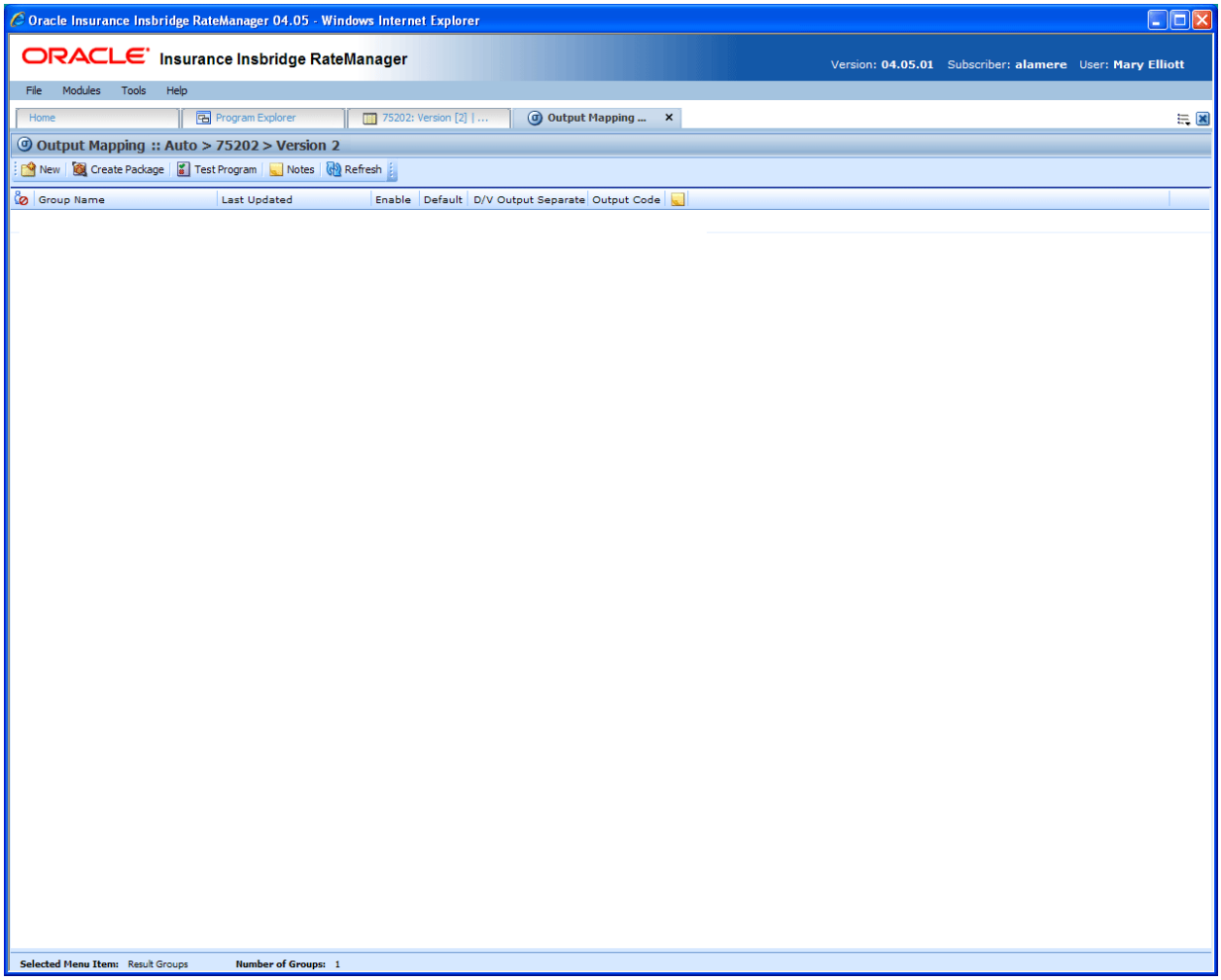
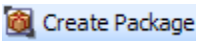
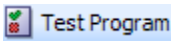
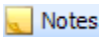
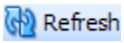


Figure 231 Output Mapping Tab

FUNCTIONALITY

The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this tab. The top bar menu has the options for creating packages and testing.

Functions:

	New: Starts the process of creating a new output group.
	**Create Package:** Packages the program for rating and testing. See Packaging for more information.
	**Test Program:** Opens the Test Program, which allows the user to test and debug a program within RateManager. See Test Program for more information.
	**Notes:** Allows you to enter, edit and view notes to the output mapping.
	**Refresh:** Refreshes the screen with the current information.

FIELDS

Shows a listing of the output groups created.

In Use Icon: An icon in this column indicates that this output mapping is being edited by another user.

Group Name: Name of the output group.

Last Updated: Time stamp of when the output group was last saved or the options were changed.

Enable: A check indicates that the output group will be available to use when rating.

Default: A check indicates that the output group will be the default group used when rating, unless overridden in the input XML.

D/V Output Separate (Auto LOB only): A check indicates that output for the drivers and vehicles will be listed separately in the result XML. For more information, see the driver assignment topic Separating Driver and Vehicle Output (Auto LOB Only).

Output Code: An automatically generated code that cannot be changed but can be used to override the default output group. For more information, see the SoftRater section, SoftRater Switches.

Notes: A notes icon in this field designates that a Note has been added.

Right Click Menu for Output Mapping

Output Mapping Groups have a right click menu with some features that are not found on the menu bar.

- **Edit:** Opens the Edit Output Mapping tab where you can change the output mapping.
- **Copy**: Allows you to make a copy of the selected output group.
- **Delete**: Deletes the selected output group.
- **Options**: Allows you to change information about the selected output group. This includes the name, default option, enabled option and, if an auto program, the driver vehicle separate option.

- **Notes**: Will open up the notes screen where you can add, edit, view, and delete notes for the output group.
- **Map Custom Output XML:** Opens a window that allows you to create a mapping that will transform the output XML. See Input and Output Mapping for more information.
- **Program Output XML**: Opens a window that displays the Program Output XML.

CREATING A NEW GROUP

RateManager supports an unlimited number of output groups for any program version. Every program must have at least one output group. Each output group contains a specific set of elements that will be output when that group is used. The Output Mapping tab allows you to create, edit, copy and delete an output group.

NOTE: *Programs must be packaged before you can edit the group.*

To Create a New Output Group

1. Navigate to the **Output Mapping tab** for the program version where you want to create an output group.
2. Select **NEW** from the menu bar. This will open the **New Output Group** window.

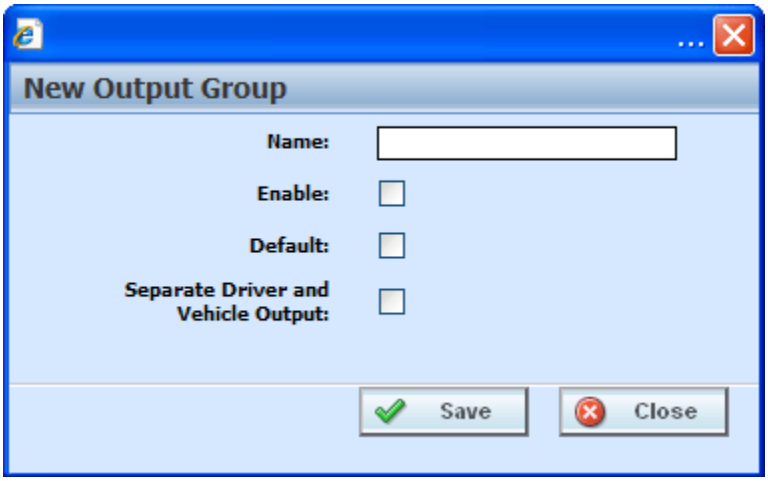


Figure 232 Entering a New Output Group

NOTE: *The Separate Driver and Vehicle Output option will only be available on Output Mappings in the Auto LOB.*

3. Enter a name for the new output group. If this is the first output group, the **Enable** and **Default** options will get checked automatically when saved. If this is an additional output group, the **Enable** option will get checked automatically when saved. To set the new group as the default, select the **Default** option.

4. Click **SAVE** when you have finished to save the new output group and update the output group listing.

EDITING GROUP OPTIONS

Editing an output group allows you to change the name of an output group, as well as, whether it is enabled and/or the default. For an auto line of business output group, you also can set the separate driver vehicle option.

To Edit Group Options

1. Navigate to the **Output Mapping tab** for the program version that contains the output group you want to edit.

2. Select the group whose options you want to edit and then right click. Select **Edit Output Group** from the menu. This will open the Edit Output Group popup window.

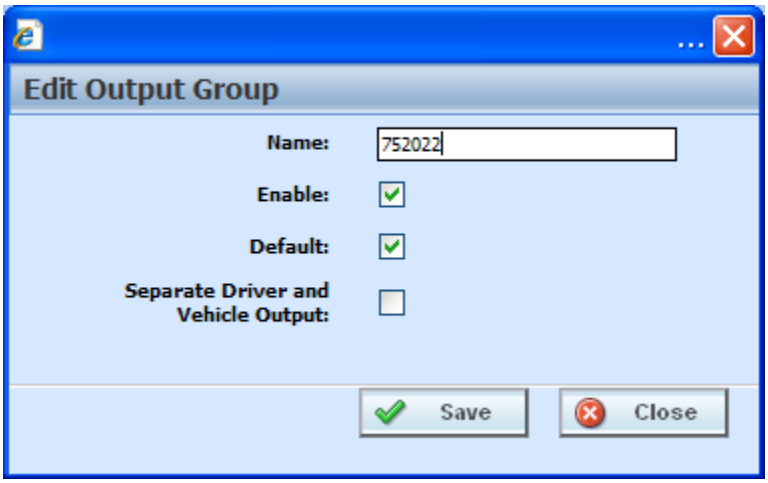


Figure 233 Edit Output Group

3. Type in a new name for the output group. To enable the output group, select the **Enable** option. To set the group as the default, select the **Default** option. Click **SAVE** when you have finished to save the new output group and update the output group tab listing.

4. For an Auto program, you also will have the option to **Separate Driver and Vehicle Output**. For information on this option, see the driver assignment topic Separating Driver and Vehicle Output.

EDIT OUTPUT GROUP MAPPING TAB

You will edit an output mapping when you want to change the output results or to change result IDs. The first time you enter the edit tab, it will be blank. You will need to add variables based on the categories used.

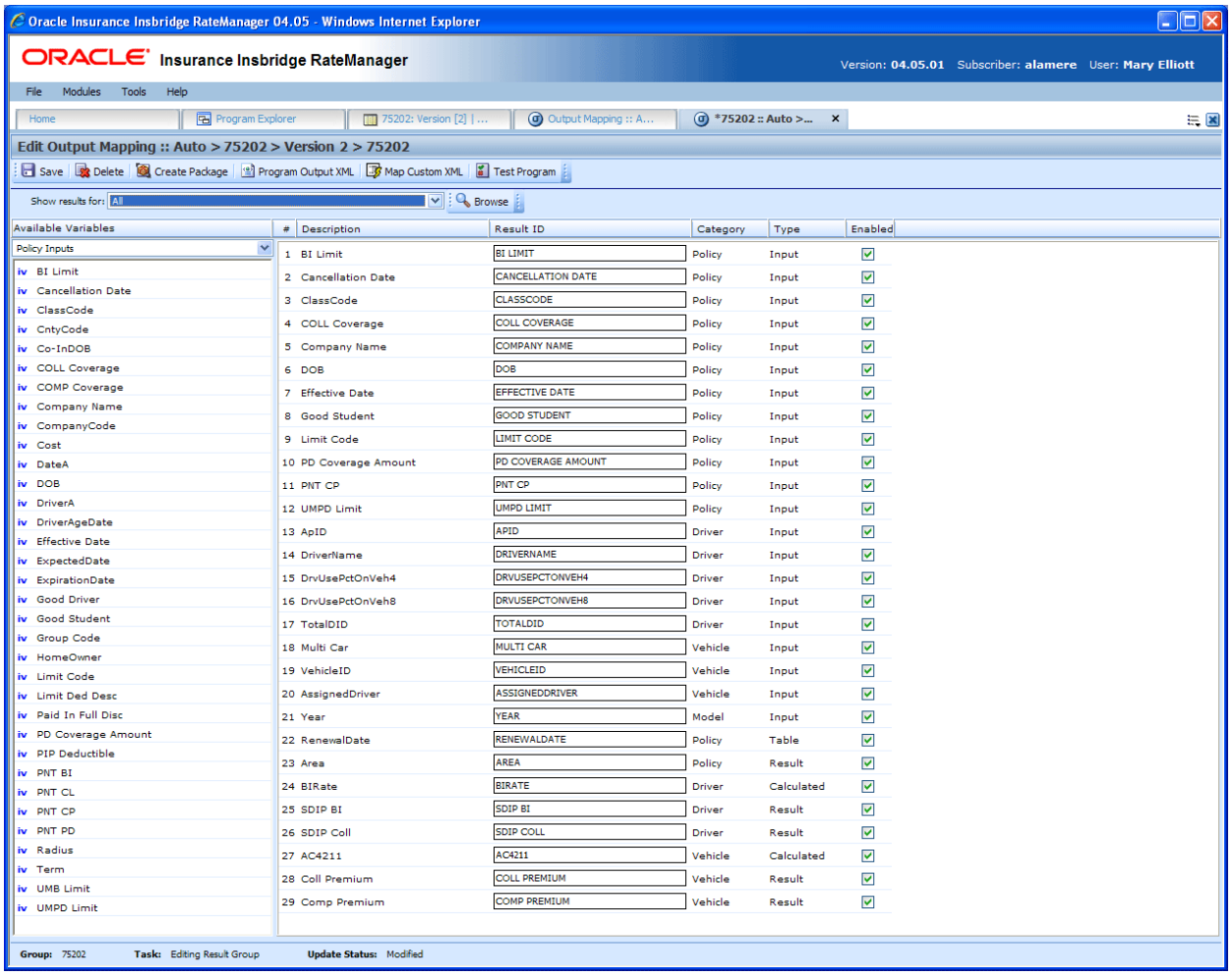


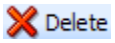
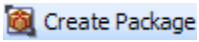
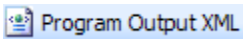
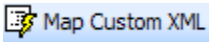
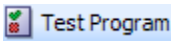
Figure 234 Editing an Output Mapping

FUNCTIONALITY

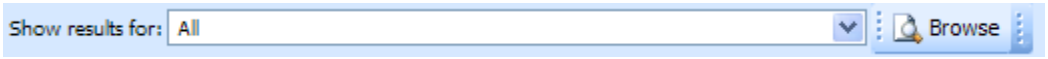
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this tab as well as a search option. The top bar menu has the options for creating packages, testing and working with custom XML.

Functions:

Save	**Save:** Saves the output mapping.

	**Delete:** Removes the selected result from the output mapping.
	**Create Package:** Packages the program for rating and testing. See Creating a Global Versioning Package for more information.
	**Program Outputs XML:** Opens a window that displays the Program Outputs XML.
	**Map Custom XML:** Opens a window that allows you to create a mapping that will transform the output XML. See Input and Output Mapping for more information.
	**Test Program:** Opens the Test Program, which allows the user to test and debug a program within RateManager. See Test Program for more information.

Search



Show Results For: Allows you to filter the category shown. You also can browse for a category by clicking **BROWSE**. This will bring up the Browse Category popup. From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the show results for area.

All is the default category. This will display all selected variables and the corresponding Result ID.

FIELDS

There are two areas on the Output Mapping Tab.

- **Available Variables:** The list of the available inputs, variables and results that can be used in the Selected Results area.
- **Selected Results:** A listing of inputs, variables and results that have been selected. The listing shows the results in the order they will be outputted.

Available Variables

Drop down selection of available inputs, variables and results sorted by category. To add an item to the selected result mappings, find the element you want to add in the listing and double-click it. The element will be added to the selected results.

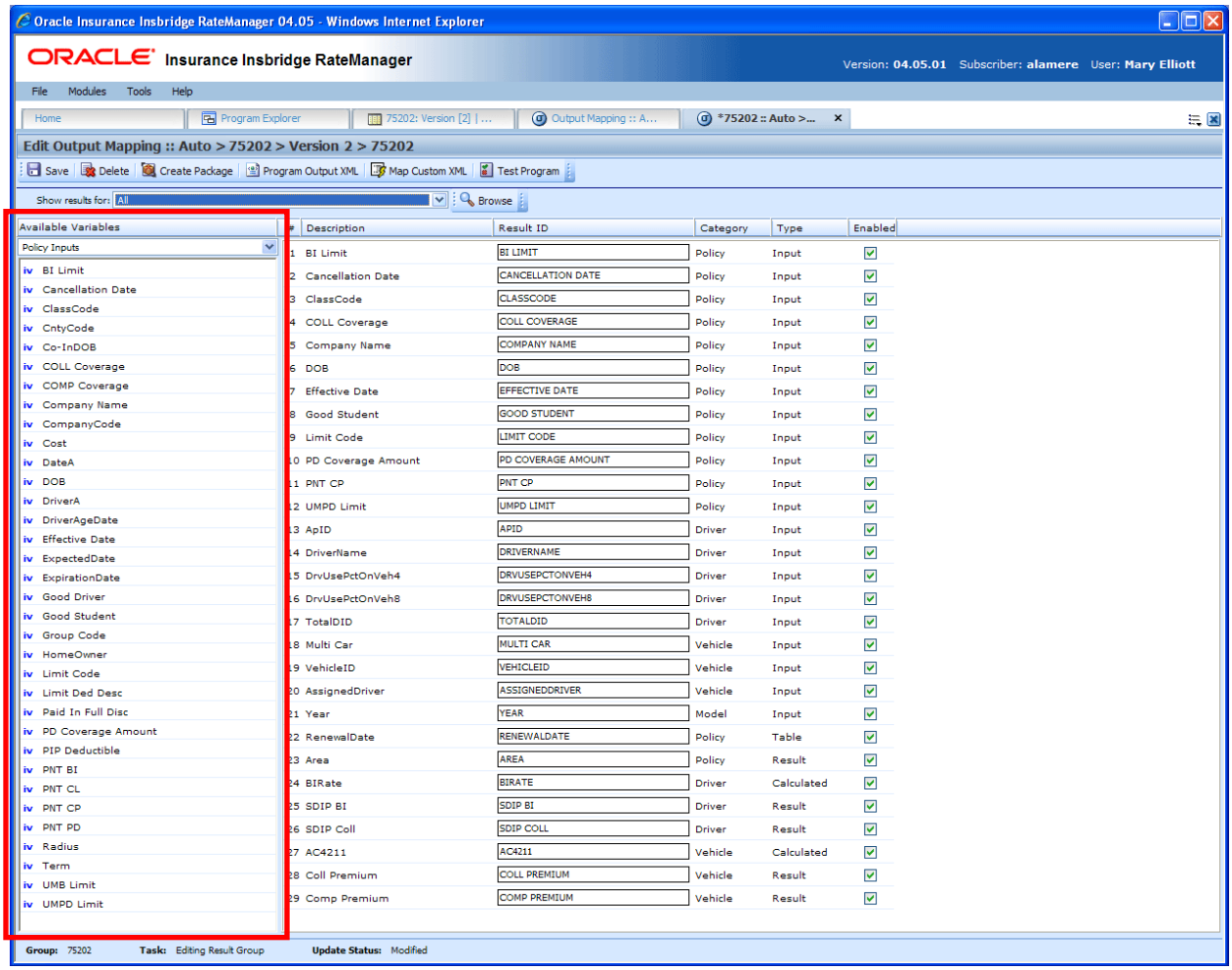


Figure 235 Available Variables for Output Mapping

Fields

Menu: The menu is the top most field. Click the down arrow to select the category variables you want to view.

Selection: The available variables, for the selected category will be listed. Listing may also include other category inputs, variables and results.

Selection	Description
Policy Inputs	Inputs in the Policy category.
Policy Variables	Table and calculated variables in the Policy category.
Policy Results	Result variables in the Policy category.

Selected Results

A listing of inputs, variables and results that have been selected. The listing shows the results in the order they will be outputted. The results can be moved by selecting, dragging and dropping.

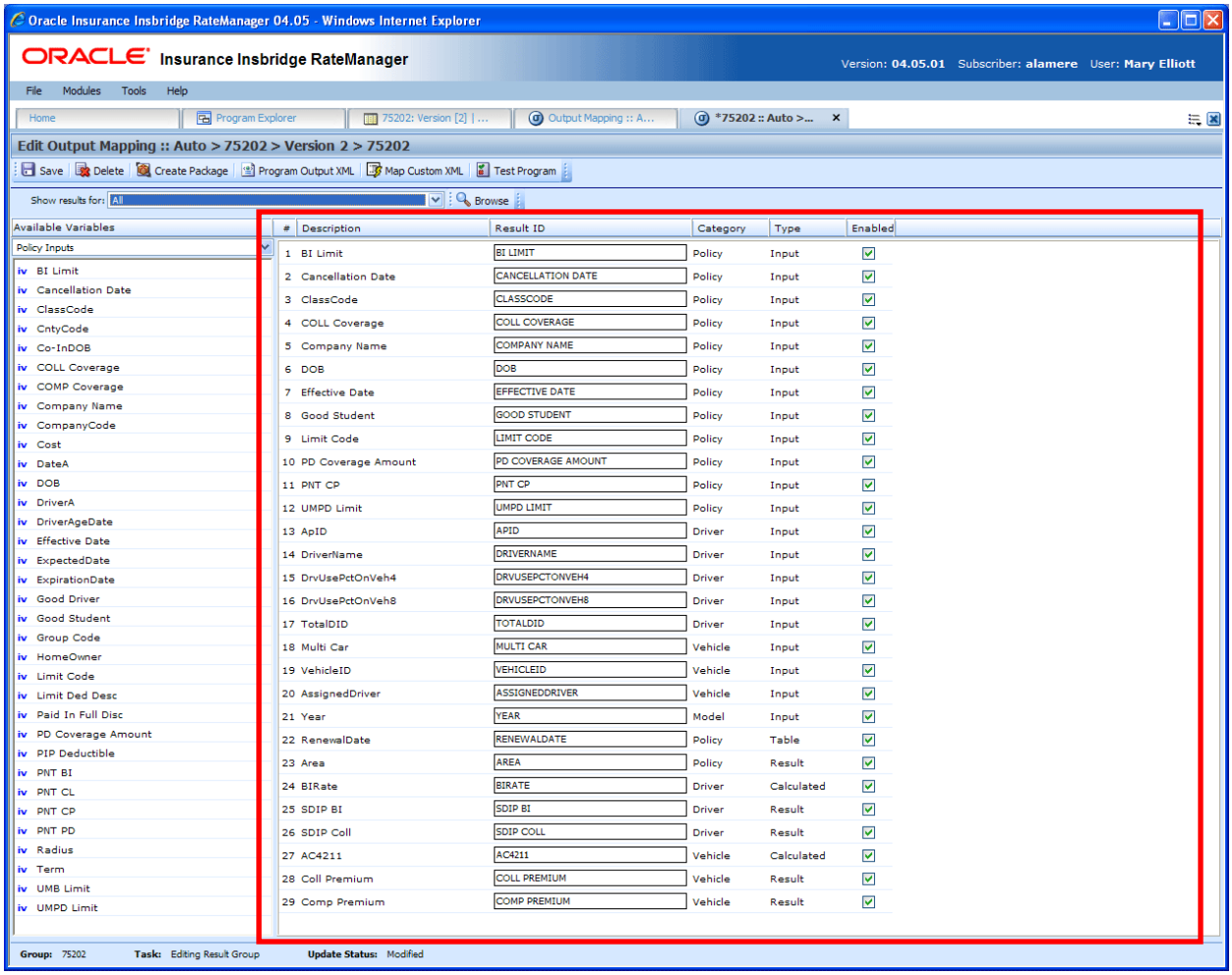


Figure 236 Available Variables for Output Mapping

Fields

#: The order in which the result will be displayed.

Description: The name of the variable or input.

Result ID: The associated ID that is used for XML mapping. Result IDs will automatically fill with the variable description in all capital letters. You can enter a different **Result ID** that you want in the associated field if necessary. The ID can be up to 256 characters.

Category: The working category of the variable or input.

Type: The type of variable or input. i.e. table, calculated, input or result.

Enabled: A check indicates that the result will be mapped. All results are active when brought into the selected column. A green checkmark will be in the **Enabled** column. If you want to leave a result in the listing, but do not want it executed, then remove the check next to the result.

Editing an Output Mapping

On the **Edit Output Mapping** tab you can choose which inputs, variables, and result variables will be output in the rate result.

1. Navigate to the **Output Mapping tab** for the program version you want to edit.
2. Select the output group you want to edit and double-click it or right click and select **EDIT**. This will open the **Edit Output Mapping** tab for the output group.
3. Select the category you want from the **Show result for** drop down menu.
4. Select the same category from the **Available Variables** drop down list on the left hand side of the screen. The categories must be the same. For example, if you select the Policy category up top, you will now be able to add the Policy inputs, variables and results.
5. Double-click the input, variable, or result you want to add. It will be added to the listing. You can add as many inputs, variables and results as you need. The first item you add to the selected column will be the first one listed, the second one added will be the second one listed and so on. You can change the order after you are done.
6. **Result ID**s will automatically fill with the variable description in all capital letters. You can enter a different **Result ID** that you want in the associated field if necessary. **Result IDs** do not affect the rating process; they only exist to ease integration efforts with a company's existing back end systems. The ID can be up to 256 characters.
7. Make any edits that you may need. You can delete the elements you do not need and move the elements to the position you need as well. Make as many changes as you need
8. Click **Save** to save your work.

NOTE: *If you receive a message saying that a specific result cannot be added because the wrong category is selected. This means that the working category of the result you are trying to add differs from the filtered working category of the result mapping. Click **Yes** to automatically switch to the appropriate category and add the item to the result mapping.*

Changing Output Order

To change the result order, use the **Show Results For** box to select a category. Highlight the item you want to move. Hold down the mouse button to drag and drop the results. You will know the result is ready to move when you see a blue shadow box containing the result information displayed.

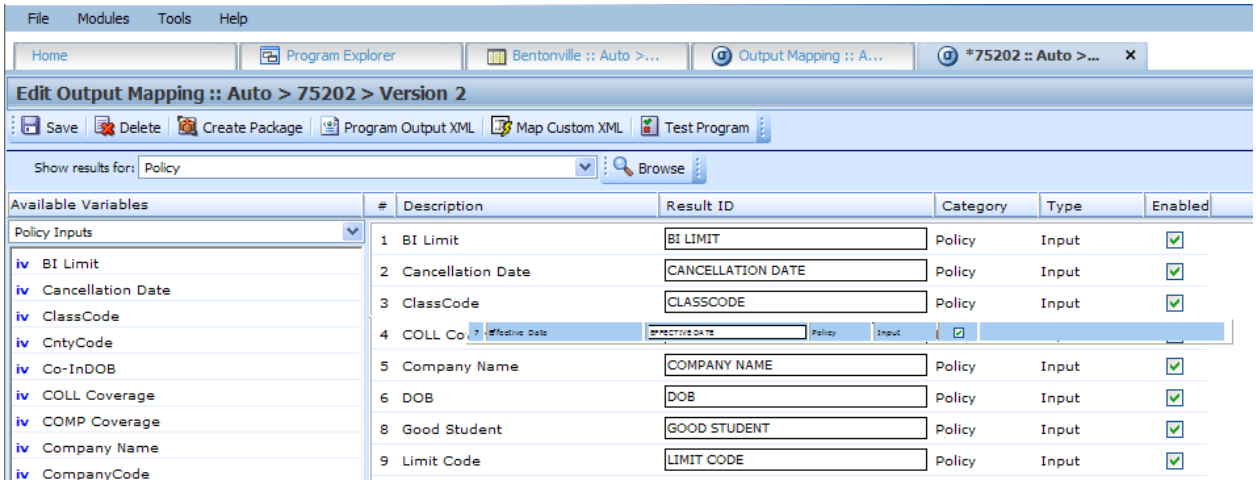


Figure 237 Moving Output Mapping

Output Code Location

Output codes are required for custom XML mappings. This allows you to override the default result mapping group. By default, SoftRater uses the group that is set up as the default in RateManager. To use a different result group, you will need to add the attribute result_def="Result_Code" where Result_Code is the output code shown on the Output mapping tab.

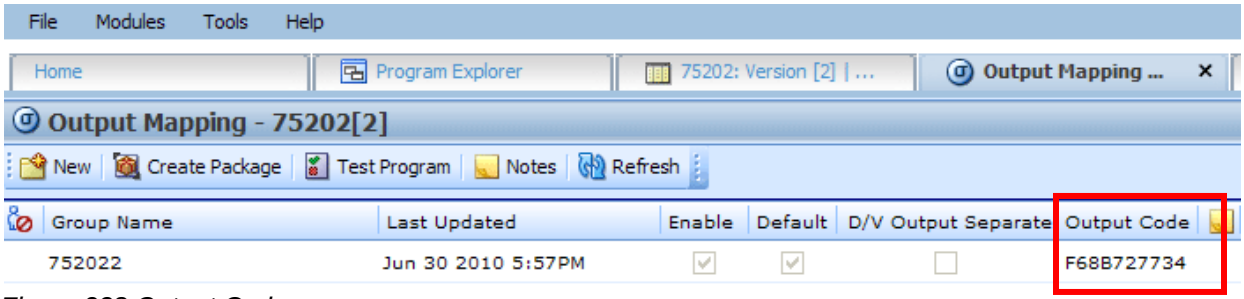


Figure 238 Output Codes

If you are not using custom XML mappings, you will not need to enter the output code anywhere.

DELETING A GROUP

Output groups can be deleted at any time. It is possible to delete all output groups. However, in order to package a program, you must have at least one output group.

To Delete a Output Group

1. Navigate to the Output Mapping tab for the program and version that contains the output group you want to delete.
2. Select the group then right click and select **DELETE**. A warning message will be displayed.
3. Select yes to remove the output group. Select no to return to the Output Mapping tab without deleting an output group.

Chapter 22

INPUT AND OUTPUT MAPPING

SoftRater requires that input files be in a specific XML format, known as Insbridge.XML. Likewise, when SoftRater finishes rating, it returns the results in Insbridge.XML format as well. An example of an input file in the Insbridge.XML format is shown below:

```
<rate lob="5">
    <heading>
        <program parent_id="123" program_id="3" program_ver="1"/>
    </heading>
    <c i="0" desc="Policy">
        <m i="2" n="EffectiveDate" v="04/11/2010"/>
        <m i="4" n="TerritoryCode" v="1"/>
    </c>
    <c i="1" desc="Dwelling">
        <m i="6" n="PerilDeductible" v="250"/>
        <m i="11" n="FireAlarmInd" v="1"/>
        <m i="12" n="BurgularAlarmInd" v="1"/>
        <m i="13" n="OccupancyCode" v="1"/>
        <m i="19" n="DwellingLimit" v="150000"/>
        <c i="2" desc="Coverage">
            <m i="5" n="Coverage">
            <m i="16" n="CoverageCode" v="CovA"/>
            <m i="17" n="CovLimit" v="150000"/>
        </c>
        <c i="2" desc="Coverage">
            <m i="15" n="CovInput" v="3"/>
            <m i="16" n="CoverageCode" v="CovC"/>
            <m i="17" n="CovLimit" v="75000"/>
        </c>
    </c>
</rate>
```

If your organization has an existing XML format you want to use (such as ACORD® XML), then you can use RateManager to map the inputs from your organization's XML format to the Insbridge.XML format. In addition, you can also map the outputs from the Insbridge.XML format to your organization's XML format. This allows you to rate using an input file in your organization's XML format and receive a result file in your organization's XML format. The process looks like this:

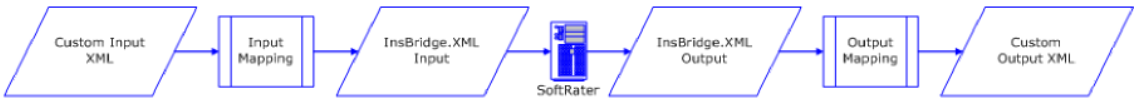


Figure 239 Using an existing XML Format

Alternatively, you can create your own style sheets and have SoftRater convert the input file before rating and convert the output file after rating.

For the purposes of this user guide, custom mappings will refer to any mappings created outside of the IBRU system.

Preparation for Mapping an Input File

Before you begin the process of mapping, you will need a sample of the custom XML file that will be used during rating. Make sure the file contains all the inputs you want to map. An example of a custom XML file for a fire program is shown below:

```
<Fire>
    <Policy>
        <EffectiveDate>03/05/2011</EffectiveDate>
        <TerritoryCode>1</TerritoryCode>
        <Dwelling>
            <PerilDeductible>250</PerilDeductible>
            <FireAlarmInd>0</FireAlarmInd>
            <BurgularAlarmInd>1</BurgularAlarmInd>
            <OccupancyCode>1</OccupancyCode>
            <DwellingValue>125000</DwellingValue>
            <Coverage>
                <CovCode>CovA</CovCode>
                <Limit>125000</Limit>
            </Coverage>
            <Coverage>
                <CovCode>CovC</CovCode>
                <Limit>125000</Limit>
            </Coverage>
        </Dwelling>
    </Policy>
</Fire>
```

In the above file, the inputs are EffectiveDate, TerritoryCode, PerilDeductible, FireAlarmInd, BurgularAlarmInd, OccupancyCode, DwellingLimit, CovCode and Limit.

MAPPING INPUTS

Inputs can be mapped at either a global level or a program version level.

- If inputs are mapped at a **global level**, then the mapping will be available for all programs under that subline. This is useful if inputs are the same across all or most of the programs under that subline.
- If the inputs are mapped at a **program version level**, then the mapping will be available for that program version only.

Custom inputs cannot be mapped at a **MultiLines level**.

Regardless of which option you choose, the process of mapping the inputs is the same, with the exception that global mappings are done on the **Program Explorer tab→Sublines**, while program version mappings are done from the **Program Explorer tab→Program→Program Version**. Additionally, you can import a mapping from the global level to the program version level or from the program version level to the global level.

Navigating to Custom XML Mappings at the Global Level

Global mappings will include all inputs found in the subline.

1. From the Program Explorer tab, select the subline where you want to map inputs.
2. Right click and select **MAP CUSTOM XML**.
3. This will open the **Input Mapping** screen.

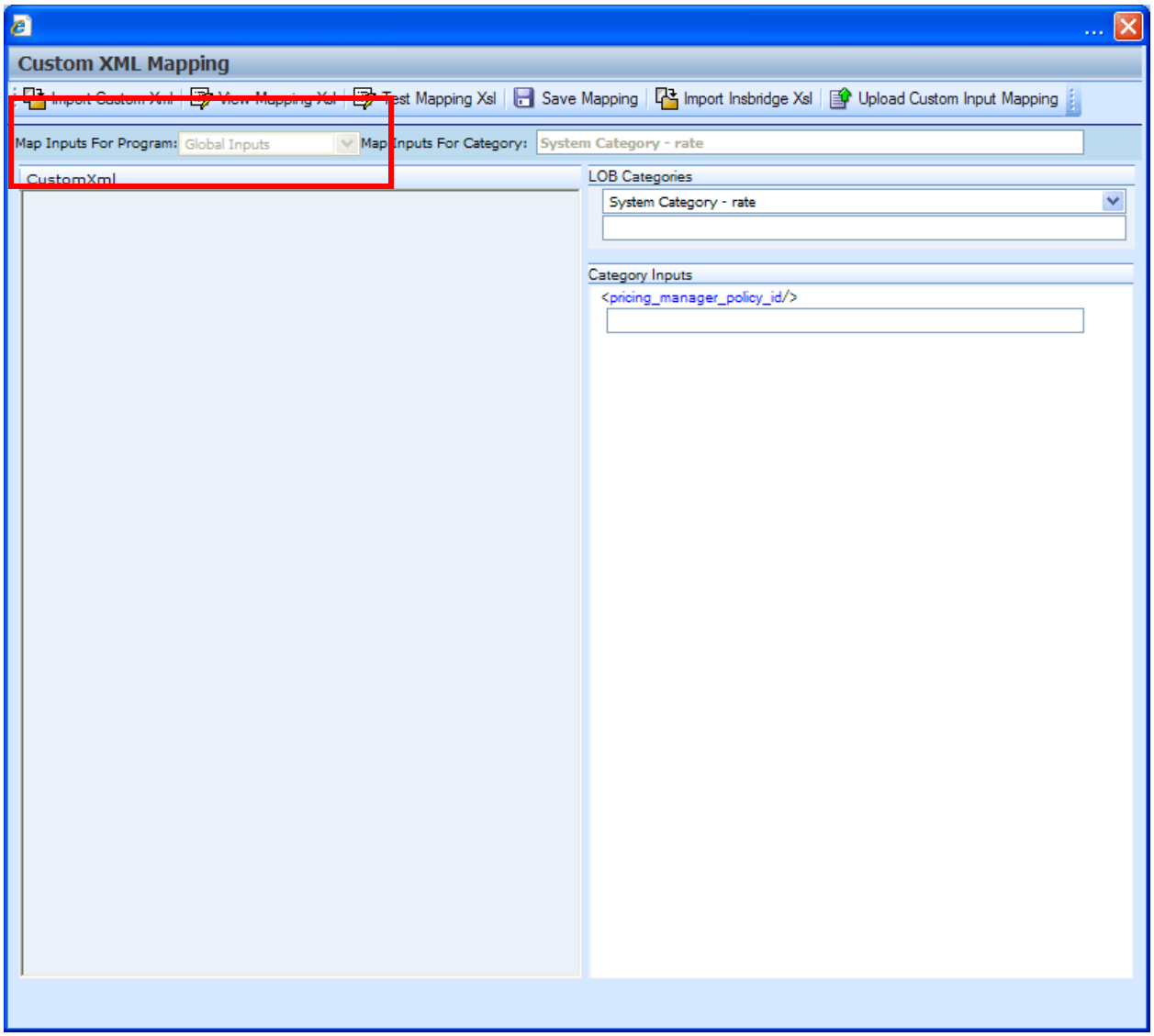


Figure 240 Custom XML Mapping at Global Level

4. At this point, you can begin mapping your inputs. See **Creating a New Input Mapping** for more information.

You can verify that you are mapping at the global level by looking at the selection in the Map Input For Program field.

Navigating to Custom XML Mappings at the Program Version Level

NOTE: *Before creating a mapping at the program version level, create a new RateManager package for it. You will only be able to include the inputs that were used when the last package was created in your mapping.*

1. From the **Program Explorer** tab, select the **program** that contains the program version where you want to map inputs.
2. Select the program version where you want to map inputs and then right click.
3. Select **Map Custom Input XML** from the menu. This will open the **Input Mapping** screen.

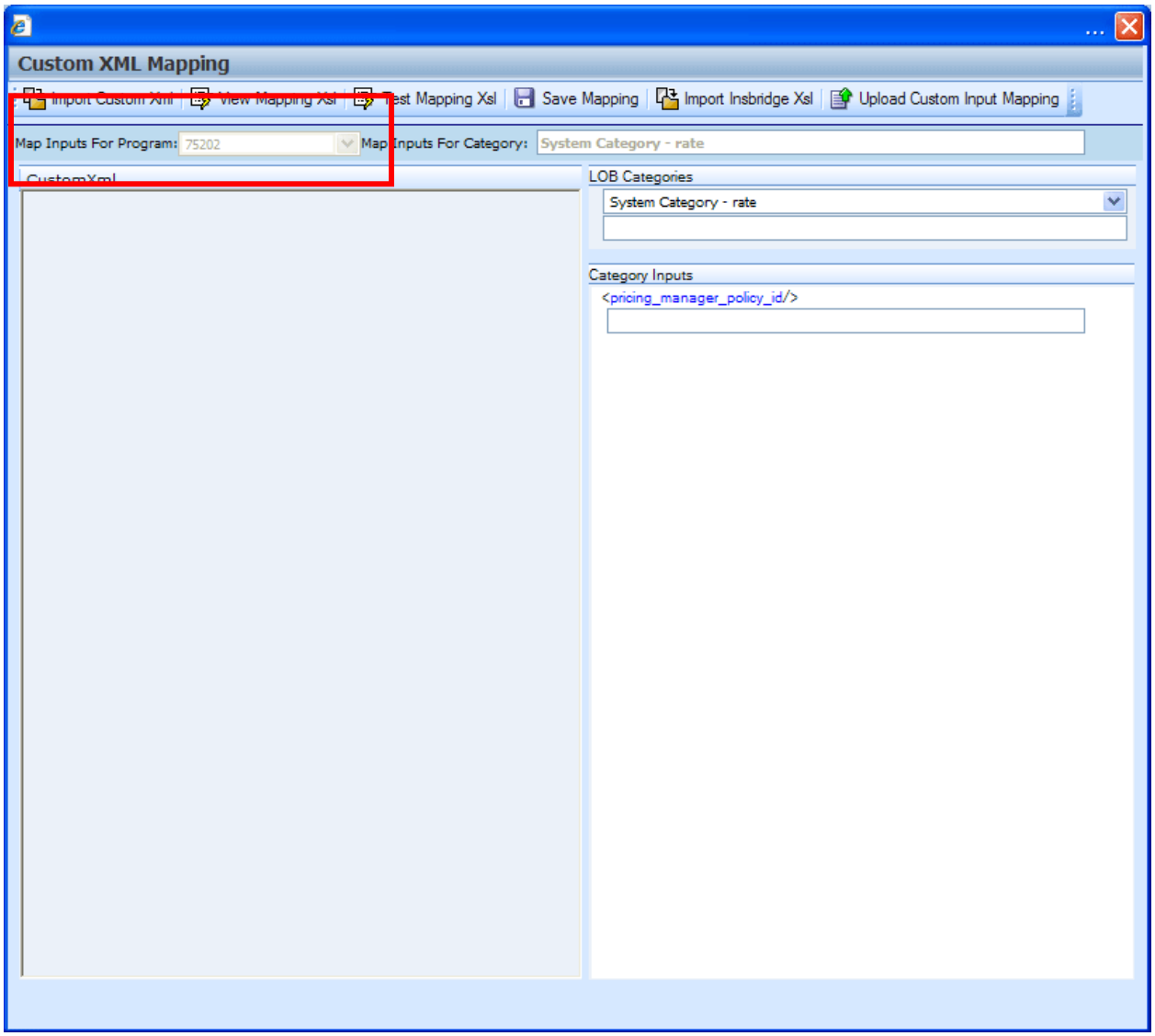


Figure 241 Custom XML Mapping at the Program Version Level

4. At this point, you can begin mapping your inputs. See the next section, **Creating a New Input Mapping**, for more information.

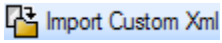
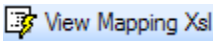
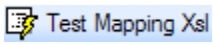
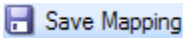
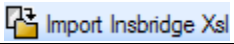
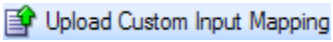
CREATING A NEW INPUT MAPPING

Regardless of which type of input mapping you are creating, the steps for completion are the same. You must be on the Custom XML Mapping screen before you can proceed. You can verify that you are mapping either at the global level or at the program version level by looking at the selection in the Map Inputs For Program field.

FUNCTIONALITY

The Menu Bar is located at the top of the Custom XML Mapping screen. The menu bar contains the functions you can perform on this window.

Functions:

	**Import Custom XML:** Opens a window where you can paste in your custom XML.
	**View Mapping XSL:** Opens a window where you can view, copy and print your input file.
	**Test Mapping XSL:** Your input file will be tested and the results will be displayed.
	**Save Mapping:** Saves your input file to the local server. Files saved here will be available on the Testing module.
	**Import Insbridge XSL:** Allows you to upload an Insbridge Xsl file.
	**Upload Custom Input Mapping:** Allows you to upload your custom mapping. Uploaded mappings will be available in the Testing module.

Fields:

An information bar is located near the top of the screen. There are two fields in the information bar:

- The Map Inputs for Program displays the program or global information.

- Map Inputs for Category displays the category that you have currently selected.

There are two work areas located in the lower portion of the screen.

- **Custom XML**
- **Category Inputs**

Custom XML

The custom XML work space will contain your imported custom XML file. You will not be able to edit your custom XML file here. If you need to make changes, please return to your XML editing program, make your changes and re-import.

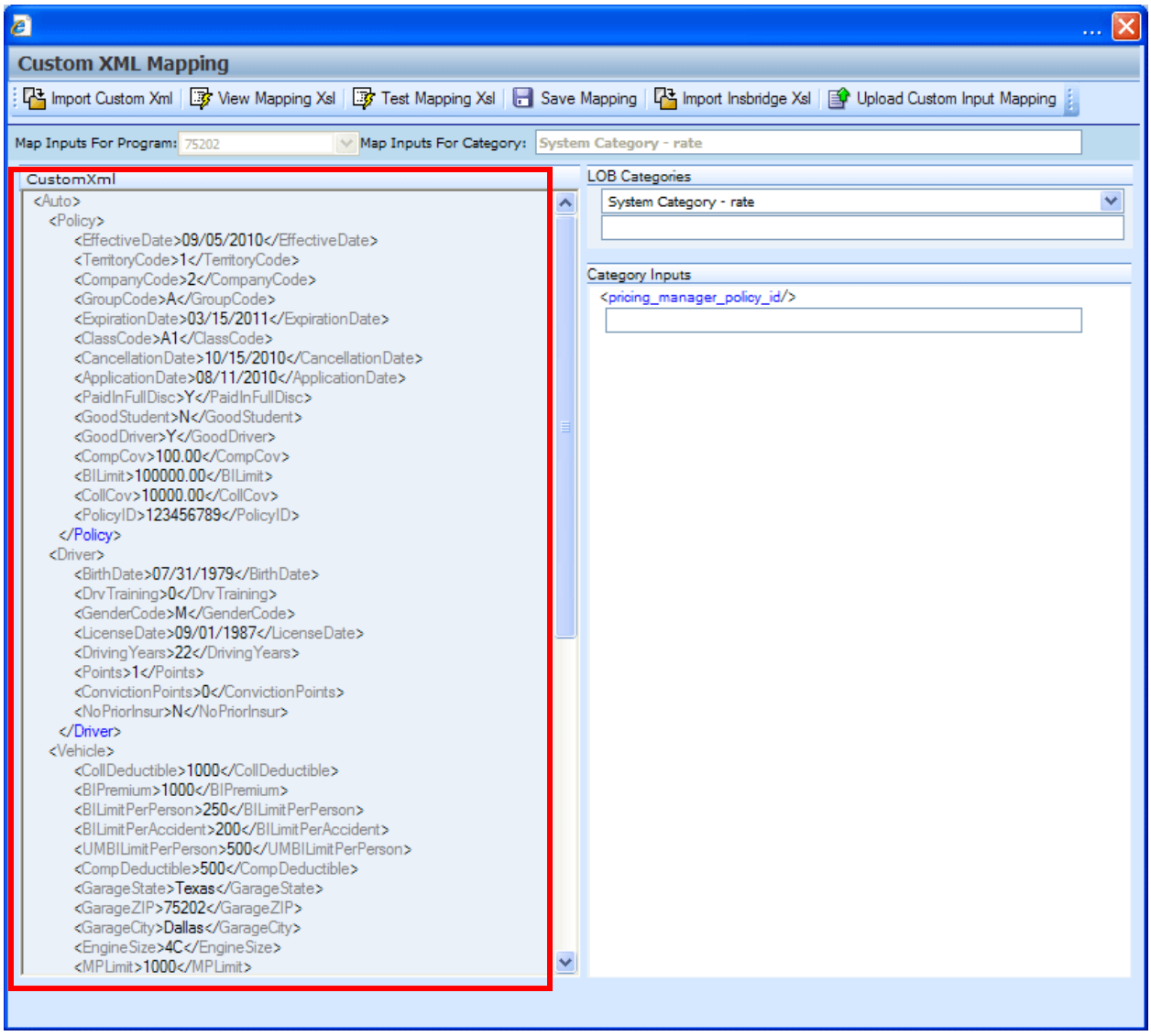


Figure 242 Custom XML Work Area

Category Inputs

The Category Inputs area contains the categories and inputs used in your program or LOB globals. You will not be able to edit any of these fields. If you need to make changes, please return to your program or the globals tab and make your changes. Package your program prior to mapping your custom XML to ensure that your changes have been incorporated. You do not have to package for a global mapping. Map the category first and then the inputs.

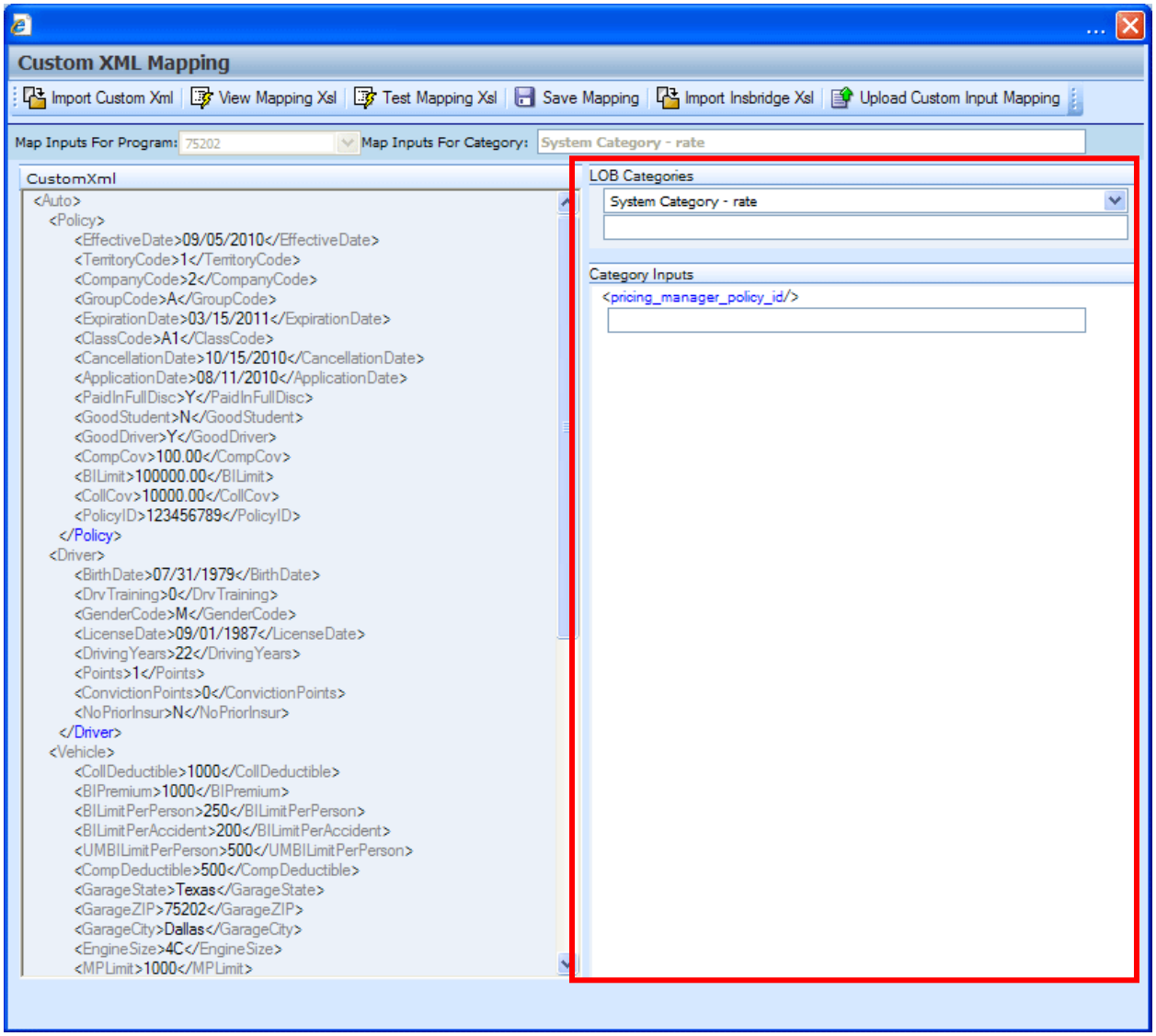


Figure 243 Category Inputs Work Area

The LOB Categories area has a category selection field at the top. Select your category and the inputs will be populated underneath. At the top level is a system category with one input. All other categories will contain the inputs used in the program or LOB globals.

NOTE: *When using custom XML in Impact Analysis, you must map the System Category: rate and category input pricing_manager_policy_id. This input requires a unique policy identifier and is used in the batch and pricing manager process.*

Mapping Inputs

1. From the Input Mapping screen, click **IMPORT CUSTOM XML**.
2. A text box will open to allow you to paste your custom XML file.
3. Outside of RateManager, open your custom XML file in a text editor or XML editor. Notepad is the simplest and fastest method however; you can use any XML editor you want.
4. In Notepad, select all of the text by selecting **Edit→Select All** or by pressing **Ctrl+A**.
5. Copy the text to the clipboard by selecting **Edit→Copy** or by pressing **Ctrl+C**.
6. Return to the text box in RateManager and paste the text by right clicking the text area and selecting **Paste** from the popup menu or by pressing **Ctrl+V**.
7. The XML will be pasted into the text box.

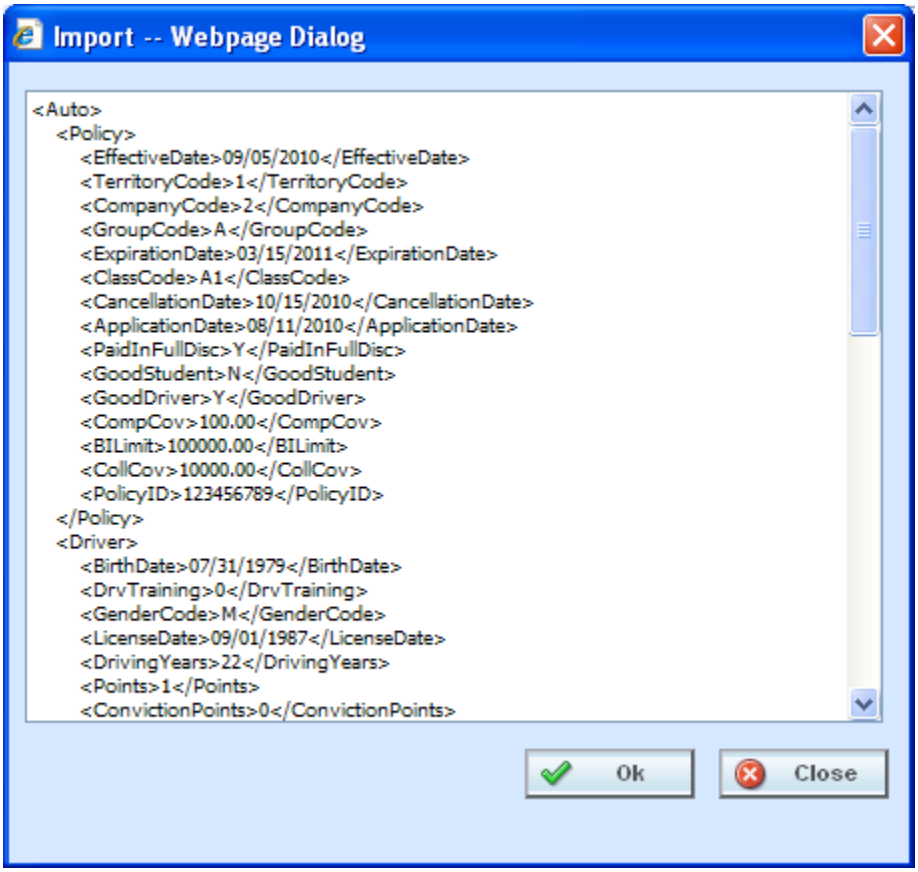


Figure 244 Import Custom XML Text Box

8. Click **OK**.
9. The custom XML will be imported into RateManager and the **Input Mapping** screen will refresh.
10. Now that your custom XML is in RateManager, you need to tell RateManager which category in the custom XML file goes with which category in RateManager. This is done by dragging and

dropping the category from the CustomXml area on the left to the blank text box in the LOB Categories area on the right.

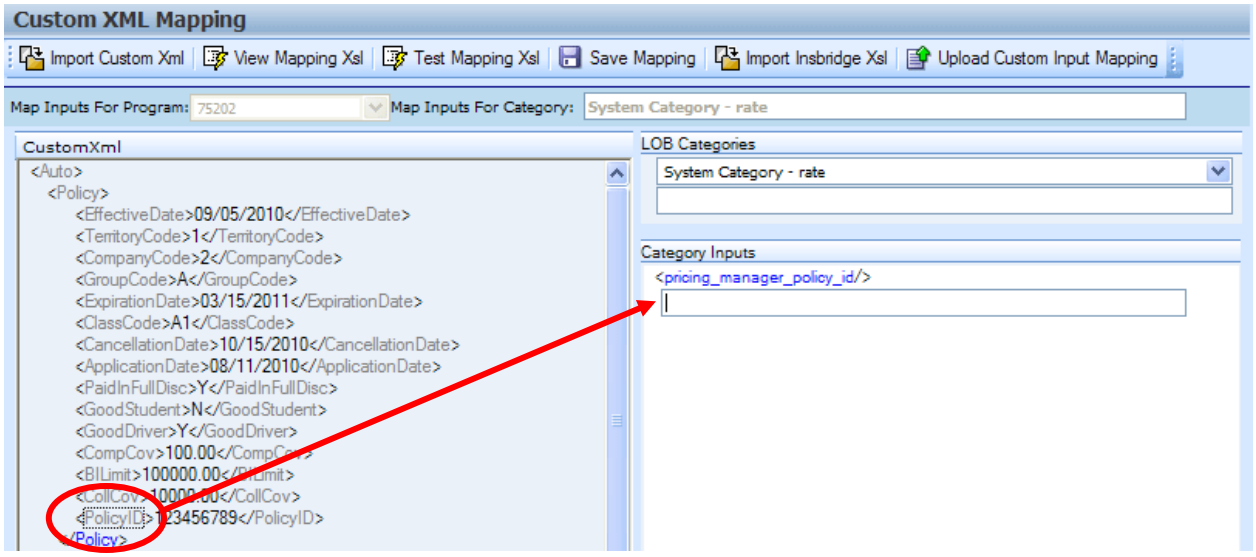


Figure 245 Mapping Custom XML

11. If you are going to use Impact Analysis, you must map the System Category: rate. The only input in this category is pricing_manager_policy_id. System Category: rate can be mapped with a single dot to indicate a top level category. You will not need to select a category from the CustomXml area. For the category input, use a unique identifier such as Policy Number. Highlight the input you want. Drag your cursor over to the field. A plus sign will be displayed when you reach the field. Release your cursor and the field will be filled with the input you have selected.

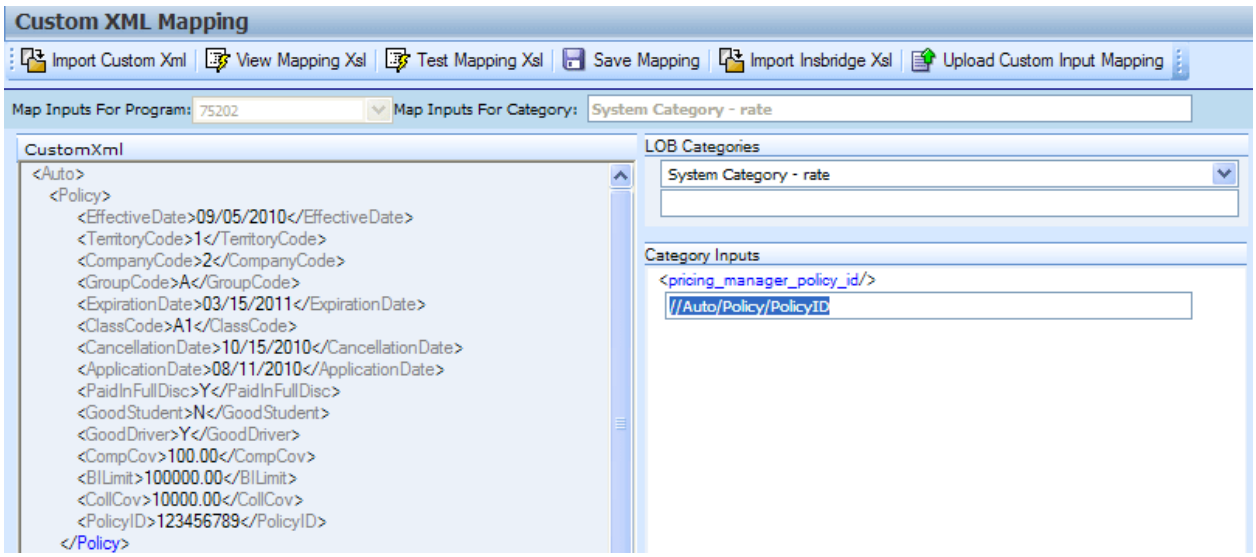


Figure 246 Mapping System Category: rate

12. Make sure you map all of your RateManager categories before mapping the inputs. To switch between categories, use the menu located at the top of the LOB Categories. If you are mapping at the program version level, you will only see the categories that are used in the program. If you are mapping at the global level, you will see all categories. To map a category, highlight the category you want in the CustomXML area. Drag your cursor over to the field underneath your

selected category in the LOB Categories area. A plus sign will be displayed when you reach the field. Release your cursor and the field will be filled with the category you have selected.

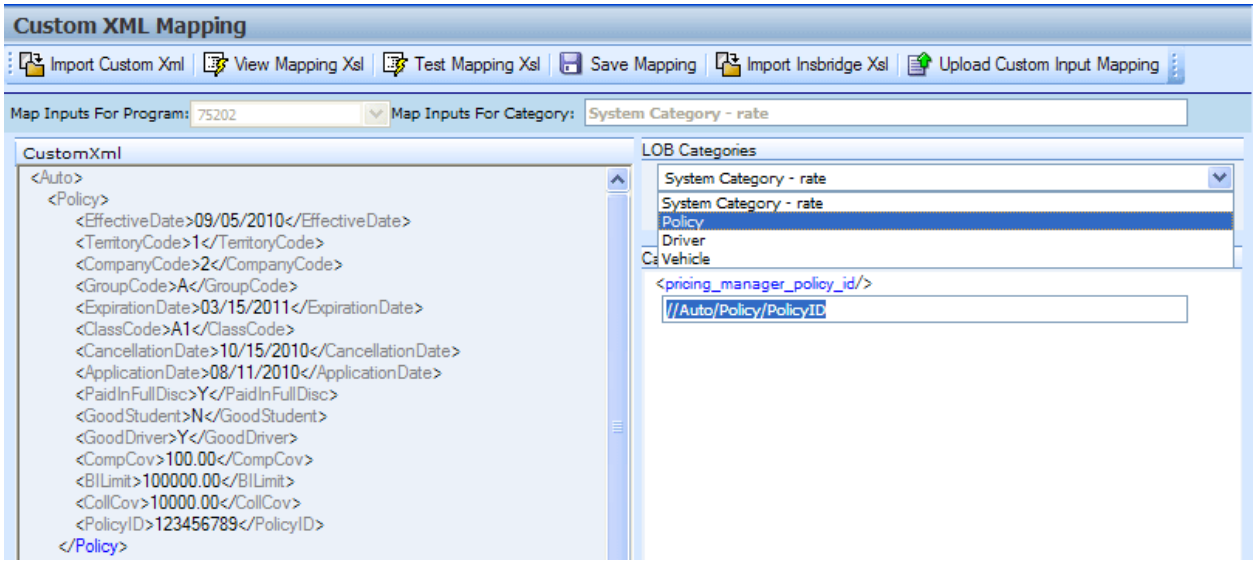


Figure 247 Selecting Categories

13. Once you have mapped all the categories, you can begin mapping the inputs. Inputs are mapped using the same drag and drop technique used to map the categories. If you are mapping at the program version level, you will only see the inputs used by the current program. Each Input located under the Category Inputs area needs to have a value. Be sure to map all the inputs. If you are mapping at the global level, you will see all inputs for the current subline. You will only need to map the inputs that are used in the programs that will use the mapping.

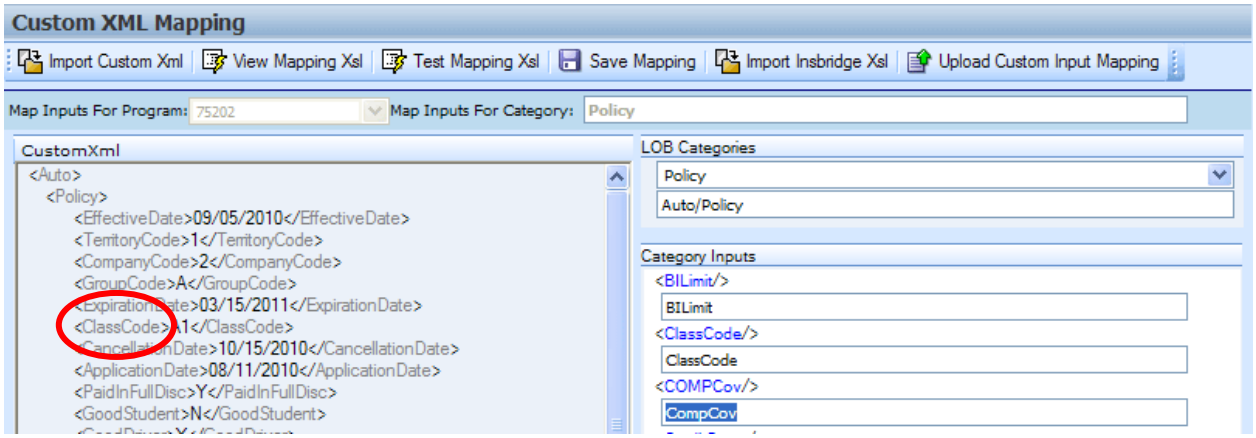


Figure 248 Selecting Inputs

14. After you have finished mapping the categories and inputs, you need to save the mapping. To do this, click **SAVE MAPPING**.

Save Mapping

The save mapping screen allows you to specify a unique identifier for the mapping. Unique identifiers allow you create multiple versions. You can create as many versions as you need. Versions will be listed in the space underneath. If there's no identifier, then the default identifier has been used.

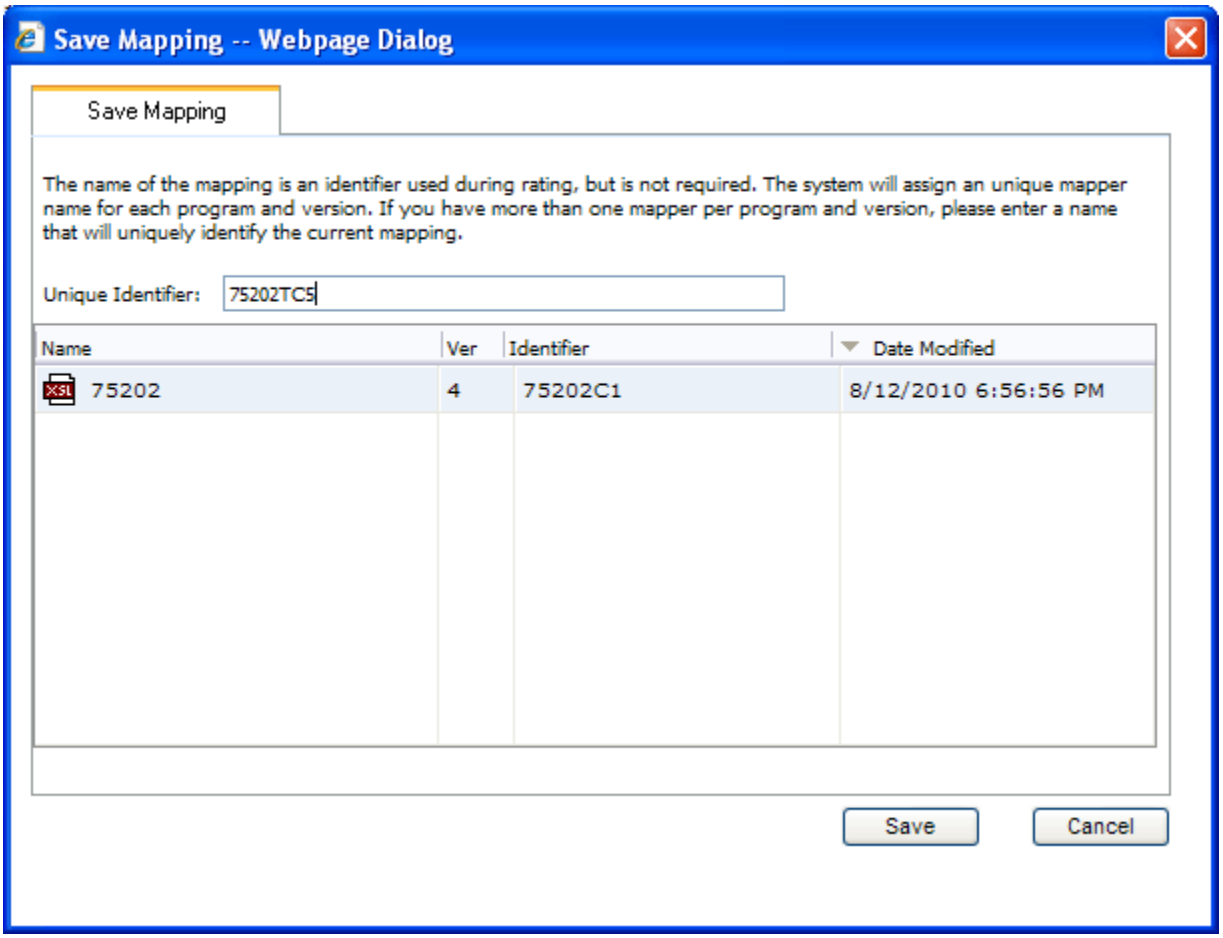


Figure 249 Save Mapping

Saved mappings have a right click menu with two options:

- **Preview Mapping**: Displays the mapping in the View Mapping XSL window. No changes will be allowed.
- **Delete**: Deletes the selected mapping. A warning message will be displayed before deleting.

To Save a Mapping

1. Enter a unique identifier. If you do not enter a unique identifier, the mapping will be saved using your subscriber ID, the line of business number, the program ID and the program version. For example, 123_5_6_1.xslt, which means subscriber 123, line of business 5 (fire), program 6, version 1. The screen will default to the last unique identifier or default identifier name used. If you save without changing the name, you will write over the previous version. No warning will be issued.
   For a global mapping, the mapping will be saved using only your subscriber ID and the line of business number. For example, 123_5.xslt, which means subscriber 123, line of business 5 (fire).

   If you do enter a unique identifier, the mapping will be saved using the same format, except the filename will be appended with the unique identifier you entered. For example, if you saved the mapping as InputMapping, then it would be saved as 123_5_6_1.InputMapping.xslt at the program version level or 123_5.InputMapping.xslt at the global level.

   Although you will not need the filename when rating, you will need to know your subscriber ID, the line of business number, the program ID, the program version and the unique identifier for the mapping.

   If you are utilizing sublines, adding a unique identifier to global mappings will keep the mapping within the subline that you intended. For example, if you do not enter a unique identifier, the global mapping will be saved as subscriber_line of business. If you save another mapping from a subline in the same line of business without a unique identifier, it will be saved in the same way, subscriber_line of business. This will overwrite your previously saved mapping, even though it is in another subline. Adding a unique identifier will help to keep the mappings separate.

2. Finally, you will need to create a new package for the program you created the mapping for. If you created a global mapping, you will need to create a new package for every program that will use the mapping.

3. For information on using the mapping while rating, see Rating a File with a Mapping.

If you are batch rating, you can select the input mapping. There are three options; Global, Local and Custom. Global uses XSLT created for the line (all inputs for the line), local uses XSLT created for a specific version (only inputs used by a specific version) and custom uses a custom XSLT created outside of the RateManager mapping tool.

Import Insbridge Xsl

The Import Insbridge Xsl option is where you can import a program version or global custom mapping that has been saved to the IBRU server. This screen also will allow you to view or delete any custom mapping file that has been loaded to the IBRU server. Clicking on the Import Insbridge Xsl option will open a separate screen where you can select the type of mapping file you want.

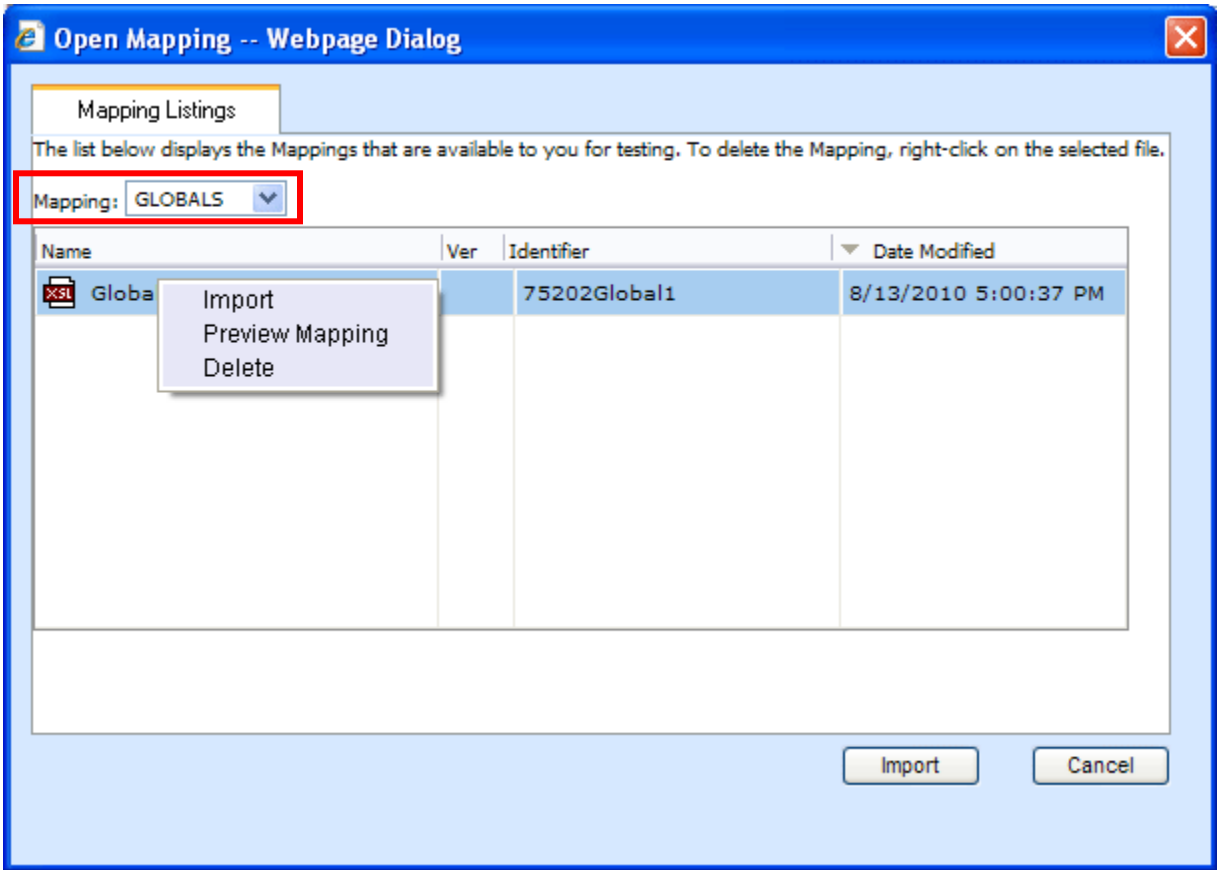


Figure 250 Open Mapping Right Click Menu

1. Select the type of mapping you want from the Mapping Listing. There are three options:

   - **PROGRAMS:** A mapping that is specific to a particular program version. Custom program version mappings are created on the **Program**.
   - **GLOBALS:** A mapping that can be used by all programs under a specific line of business. Custom global mappings are created on the **Subline**.
   - **CUSTOM:** A mapping that was created outside of RateManager and loaded into the IBRU system. A custom mapping can be viewed or deleted on the Open Mapping screen. You will not be able to Import.

   The available files will be displayed in the area below. If the Import option is grayed out, that file is not available for import or you do not have the proper permissions.

2. Select the file you want.

3. Click **Import**. The mapping screen will close and your mapping file will be loaded in to the Custom Xml area on the Mapping screen.

4. If you want to view or delete a custom mapping, right click and select the option you want.

NOTE: *Import Custom Mapping usage depends upon your group rights. If your group has the rights to write to a program, you will have the right to import mappings. If the Import option is not listed, your group does not have the right to import.*

Right Click Menu

Every mapping file will have a right click menu available.

- **Import:** Imports the selected file into the Custom Xml area on the Mapping screen.
- **Preview Mapping**: Displays the mapping in the View Mapping XSL window. No changes will be allowed.
- **Delete**: Deletes the selected mapping. A warning message will be displayed before deleting.

Custom Mapping Files

Custom Mappings are any custom mapping files that have been loaded to the IBRU server. Any custom mapping file that has been included in an SRP and loaded to any SoftRater node will be place in a custom mapping location on the server. The custom mapping files that will be displayed will be the files found in this location.

CREATING A NEW OUTPUT MAPPING

Unlike an input mapping, an output mapping can only be created for a specific program version (program version level). This is due to the fact that result mappings are created at the program version level.

Preparation for Mapping an Output File

Before you begin the process of creating a mapping, you will need a sample of the custom XML file that you want to receive after rating. Make sure the file contains all the outputs that you will need. An example of a custom output XML file for a fire program is shown below:

```
<Fire>
    <Policy>
        <TotalPolicyPremium>250</TotalPolicyPremium>
        <Dwelling>
            <LocationNumber>1</LocationNumber>
            <Coverage>
                <CovCode>CovA</CovCode>
                <CovPremium>125</CovPremium>
            </Coverage>
            <Coverage>
```

```
            <CovCode>CovC</CovCode>
            <CovPremium>125</CovPremium>
        </Coverage>
    </Dwelling>
</Policy>
</Fire>
```

In the above file, the outputs are TotalPolicyPremium, LocationNumber, CovCode and CovPremium.

Mapping Outputs

1. Navigate to **Result Mapping** for the program and version where you want to create a mapping. This will place you on the **Result Group Listing** screen.

2. Double-click the result group you want the output mapping based on to open it.

3. This will open the **Edit Group** screen, as shown below.

4. Check that all the results you want to see in the output have been added to the group. Also make sure there is a check in the **Enabled** box at the end of the row for each result you want to see in the output. If you make any changes, be sure to save the group before creating a mapping.

5. Click **MAP CUSTOM XML**. This will open the **Output Mapping** screen.

6. Click **IMPORT CUSTOM XML**.

7. A text box will open to allow you to paste your custom XML file.

8. Outside of RateManager, open your custom XML file in a text editor or XML editor. Notepad is the simplest and fastest method however; you can use any XML editor you want.

9. Select all of the text by selecting **Edit➢Select All** or by pressing **Ctrl+A**.

10. Copy the text to the clipboard by selecting **Edit➢Copy** or by pressing **Ctrl+C**.

11. Return to the text box in RateManager and paste the text by right clicking the text area and selecting **Paste** from the popup menu or by pressing **Ctrl+V**.

12. The XML will be pasted into the text box.

13. Click **OK**.

14. The custom XML will be imported into RateManager and the **Output Mapping** screen will refresh.

15. Now that your custom XML is in RateManager, you need to tell RateManager which category in the custom XML file goes with which category in RateManager. This is done by dragging and dropping the category from the Custom Xml area on the left to the LOB Categories text box on the right.

16. Repeat this process for all of your RateManager categories before proceeding to the outputs. To switch between categories, use the drop-down text box. You will only see the categories that are used in the current program version.

17. Once you have finished the categories, you can work on the outputs. Outputs are done using the same drag and drop technique used for the categories. You will only see the outputs used by the

current program version. Each RateManager output on the right needs to have a value.

18. Once you have finished the categories and outputs, you need to save the mapping. To do this, click **SAVE MAPPING**.

Save Mapping

The save mapping screen allows you to specify a unique identifier for the mapping. Unique identifiers allow you create multiple versions. You can create as many versions as you need. Versions will be listed in the space underneath. If there's no identifier, then the default identifier has been used.

Right clicking any saved mapping allows you to:

- View the custom mapping
- Delete the mapping. Deleting does not issue a warning message.

19. If you do not enter a unique identifier, the mapping will be saved using your subscriber ID, the line of business number, the program ID and the program version. For example, 123_5_6_1.xslt, which means subscriber 123, line of business 5 (fire), program 6, version 1.

    If you do enter a unique identifier, the mapping will be saved using the same format, except the filename will be appended with the unique identifier you entered. For example, if you saved the mapping as OutputMapping, then it would be saved as 123_5_6_1.OutputMapping.xslt.

    Although you will not need the filename when rating, you will need to know your subscriber ID, the line of business number, the program ID, the program version and the unique identifier for the mapping.

20. Finally, you will need to create a new package for the program you created the mapping for.

21. For information on using the mapping while rating, see Rating a File with a Mapping.

Rating a File with a Mapping

To test your mapping, you can use the Testing module or IBFA (Insbridge Framework Administrator). You will only be able to test input mapping in Testing. Output mapping can only be tested in the IBFA. In production, the SoftRater WSI is used to specify the mappings. For more information on this, see the SoftRater topic Sample SOAP Request.

Before starting to test, be sure you have created a package. If you are testing in IBFA, you are most likely using a SoftRater environment. If so, be sure a SoftRater package has been created and loaded to the proper environment.

Testing in Testing

1. Navigate to Testing.
2. Click . The will open the **Rate New Custom File** window.
3. Browse for the XML file you want to rate.
4. Enter your subscriber ID, if it is not already listed.
5. Enter 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**.
6. Enter the program ID you are rating.
7. Enter the program version you are rating.
8. Select the type of mapping you are using, **GLOBAL, LOCAL** or **CUSTOM**.

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

   LOCAL: A mapping that is specific to a particular program version. Local mappings are created from the **Program Details** tab.

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

9. Select the unique Identifier from the drop down menu.

   When you select the file you want to test, the Identifier will automatically be updated with the available files for you to select.

10. The example below is for subscriber **1002,** line of business **5** (fire), program **6,** version **1**. It uses a **GLOBAL** mapping that has a unique identifier of **InputMapping**.

11. When you have finished entering the information, click **RATE XML**.
12. The file will be rated and displayed in the list of input files and the results will be in the list of result files. You can open the result file by double-clicking it, just like a standard rating report.
13. If you want to rate a custom file with debug, be sure to select the debug checkbox in the top bar menu before rating the file.
14. If you want to re-rate the file, you can either double-click it or select it and click **RATE XML FILE**. If you double-click the file, it will be re-rated with the same mapping. If you click **RATE XML FILE**, you will have the option to change the mapping used.

TESTING IN IBFA

1. Navigate to the **SoftRater Test Interface** located on the **SoftRater** screen.
2. Browse for the file you want to rate or enter the XML in the text box.
3. Expand the **Maprequest Operators** section by clicking .

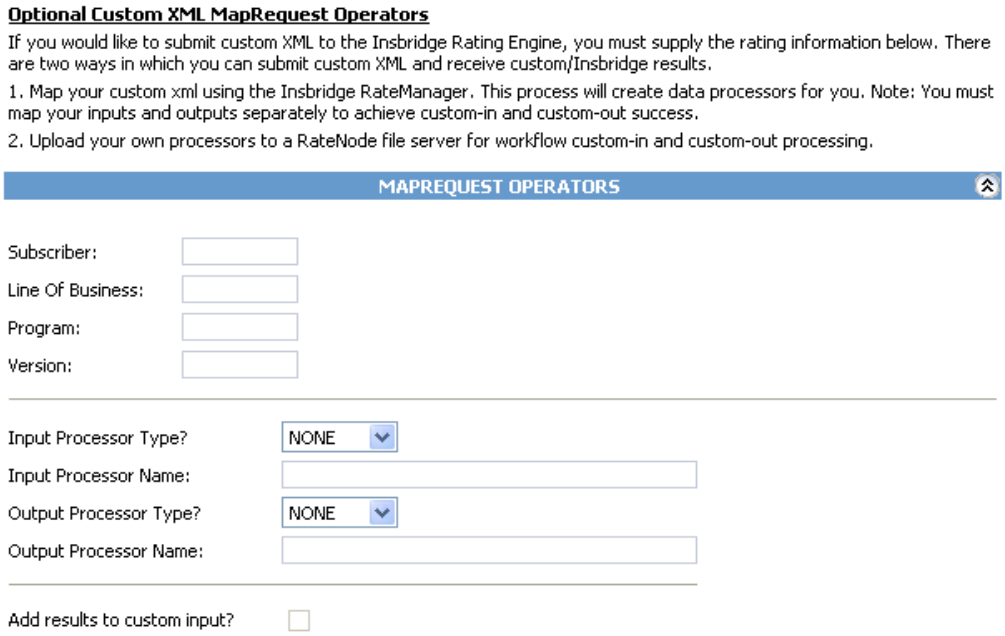


Figure 251 Testing a Mapping in IBFA

4. Enter your subscriber ID.
5. Enter 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**.
6. Enter the program ID you are rating.
7. Enter the program version you are rating.
8. Select the type of input mapping you are using, **GLOBAL**, **LOCAL** or **CUSTOM**.
9. If you saved the input mapping with a unique identifier, enter it in the **Input Processor Name** box.
10. Select the type of output mapping, if any, you are using, **GLOBAL, LOCAL** or **CUSTOM**.
11. If you saved the output mapping with a unique identifier, enter it in the **Output Processor Name** box.
12. The example below is for subscriber 200, line of business 5 (fire), program 6, version 1. It uses a

GLOBAL input mapping that has a unique identifier of InputMapping. It uses a LOCAL output mapping that has a unique identifier of OutputMapping.

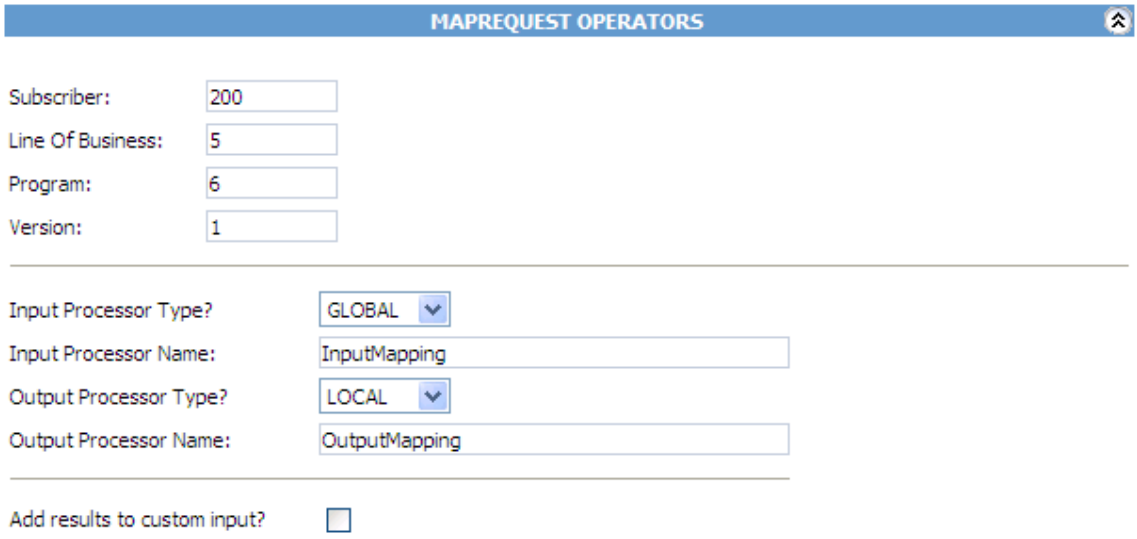


Figure 252 Completed IBFA Testing

13. If you are using both a custom input and custom output mapping and you want the results to be added to the original input file, select **Add results to custom input**.

14. Select any Rate Operators you want to use in conjunction with the Maprequest Operators. For more information, see the SoftRater Test Interface topic Optional Rate Operators.

15. Click **EXECUTE**.

16. The file will be rated and the results will be returned in the **Result Information** text box.

Using a Style Sheet Not Created in RateManager

In order for SoftRater to use an existing mapping (i.e. a mapping not created in RateManager), the mapping must be imported into RateManager. Unlike mappings created in RateManager, all custom mappings are saved at the global level regardless of whether they were imported at a program version level or at a global level. If the mapping changes, the mapping will need to be re-imported into RateManager.

To Import a Mapping into RateManager

1. Navigate to the Global Inputs Listing for the subline where you want to map inputs.
2. On the **Global Inputs Listing** screen, click **MAP CUSTOM XML**.
3. This will open the **Input Mapping** screen.
4. Click **UPLOAD CUSTOM INPUT MAPPING**. This will open the **Upload Custom Mapping** box.
5. Enter a unique name for the mapping and then enter the location to the mapping. Click **BROWSE…** to quickly locate the file. When you are finished, click **SAVE**.
6. The mapping will be imported and can now be used when rating files in the Testing module. It is not necessary to create a new package before using the mapping. See Rating a File with a Mapping for more information.

Chapter 23

PACKAGING

At the end of program development or when a change is made to a program, a process called creating a package must be performed to update the SoftRater rating engine with the logic and tables built in RateManager. A package is a small file that holds all the RateManager logic for a specific program and version.

RateManager supports two kinds of packages:

- **RateManager:** The first is called a RateManager package (*local package)*. A customer hardware environment may include many different SoftRaters. During the RateManager installation, one SoftRater is always designated as "RateManager". If a SoftRater environment exists in the authoring environment and can be rated against using Testing. When a RateManager package is created, it is automatically loaded to the SoftRater environment.

- **SoftRater**: The second type of package is called a SoftRater package (*full package)*. A SoftRater package holds all the same data as a RateManager package, but it also contains extra information that allows the package to be moved between SoftRaters. SoftRater packages are usually created to move a program to a different Rating environment. For example, a package may be moved from Development to QA or from QA to Production.

NOTE: *Creating a SoftRater package also creates a RateManager package.*

CREATING A PACKAGE

From many places in RateManager, you can create a package by clicking **CREATE PACKAGE** on the top navigation bar. The Program ID number is generated and assigned the first time a package is created for a program.

NOTE: *With the exception of changes to data tables for table variables, you must create a new package every time you make a change to a program, prior to rating. If you only make changes to the data tables for table variables, a new package does not need to be created prior to rating. This is **only applicable for RateManager Packages not for** SoftRater ones.*

To Create a Package

The steps below outline creating a package from the program details tab. The same steps (excluding 1 and 2) can be followed to create a package from the following tabs:

- Program Details
- Program Explorer
- Sequencing
- Output Mapping
- Edit Output Mapping
- Edit Releases
- MultiLines

On these tabs, click **CREATE PACKAGE** on the navigation bar.

1. Navigate to the **Program Details** tab for the subline and folder(s) that contains the program version you want to package.

2. Select the version you want to package and click **CREATE PACKAGE**. A Create Package screen will open allowing you to set options for the package.

   If "Enforce Release Packaging" is set to True in Preferences, the Create Package screen will have additional options that can be set.

Figure 253 Creating a Package

3. When you have finished setting the package options, click **PACKAGE**. The packaging process will start and the progress will be shown. A summary will be shown when packaging is finished.

4. If you created a RateManager package, you can navigate to Testing to rate input files. If you created a SoftRater package, you can navigate to the SoftRater Explorer to load the package. If you encounter errors while packaging, see Resolving Packaging Errors.

NOTE: *You will not be able to create a Packaging that does not have any algorithms in the sequence or results mapped.*

Fields: Enforce Release Packaging Set to True:

System administrators set override options. If the system does not allow for overrides, the create global versioning package options screen will have a different look. You will not be able to select the release or the environment to publish. All other options will be available.

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

- RateManager
- SoftRater

Release: If you are creating a SoftRater package, this allows you to set the environment the package will initially be placed on. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created.

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

Deployment Notes: If you a creating a SoftRater package, this allows you to enter comments about the package. The comments are viewable from the SoftRater Explorer.

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

Environment: If you checked Yes for loading SoftRater package to an environment for testing, you must select the environment where you want to load the package for testing.

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

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

ADD INPUT/OUTPUT INFORMATION: only displayed when input and output mapping files are found on the server.

Fields: Enforce Release Packaging Set to False:

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

- **RateManager**
- **SoftRater**

Environment: If you are creating a SoftRater package, this allows you to set the environment the package will initially be placed in. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created.

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

Deployment Notes: If you a creating a SoftRater package, this allows you to enter comments about the package. The comments are viewable from the SoftRater Explorer.

Add the folder name to the package description? Check if you would like to add the folder name to the SoftRater package description.

Add the program version report to the package? Check if you would like to add the program version report to the SoftRater package. See Program Version Report.

GLOBAL VERSIONING PACKAGE

In order for SoftRater to automatically choose the version of a program to rate, a global versioning package (or versioning package) must be created. A versioning package is global to all programs under a particular subline. Only one versioning package needs to be created for each subline. Create a new versioning package anytime you make changes to the way program versions are selected for a program.

Versioning packages are created the same way program packages are created, except they are created from the subline Programs Folders screen. For more information on versioning, see Versioning.
Global Versioning logic uses the program versioning criteria to determine which program version should be used by the program being called.

Creating a Global Versioning Package: Allowing for Override

System administrators set override options. If you want to select a different environment for loading a SoftRater package to, the override option must be set to true.

There are two ways to create a versioning package.

The **first** way is to right click any subline and select Create Versioning Package.

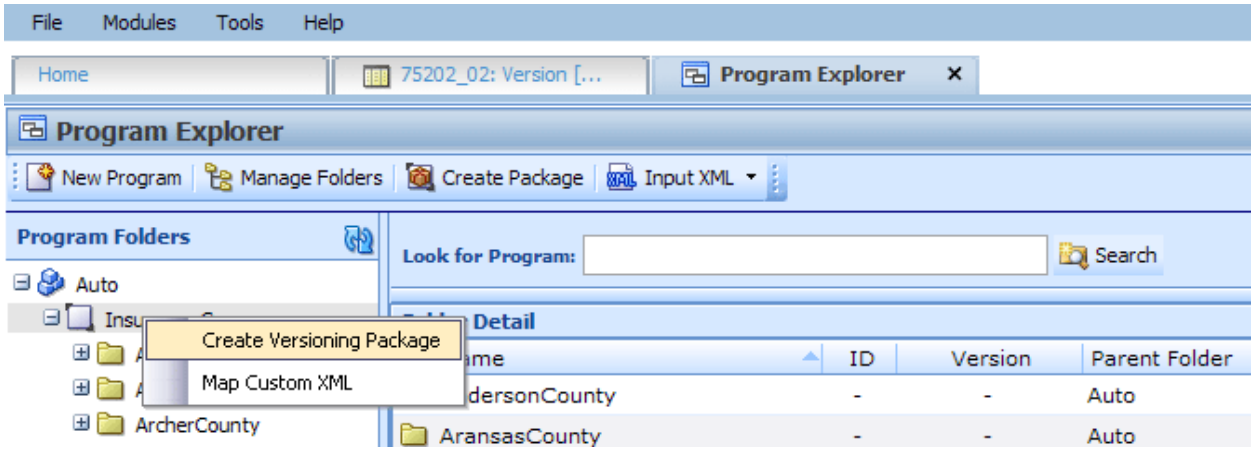


Figure 254 Cresting Global Versioning Package

This will pull up the global versioning package screen and allow you to create a versioning package for that subline. This feature can be used at any time and does not require you to leave the screen you are currently working in.

The **second** way is to:

1. Navigate to the **Program Explorer**.
2. Click **MANAGE FOLDERS**. The Manage Program Folders screen will open.
3. Click **CREATE VERSIONING PACKAGE** in the top bar menu. The Global Packaging screen will be displayed.

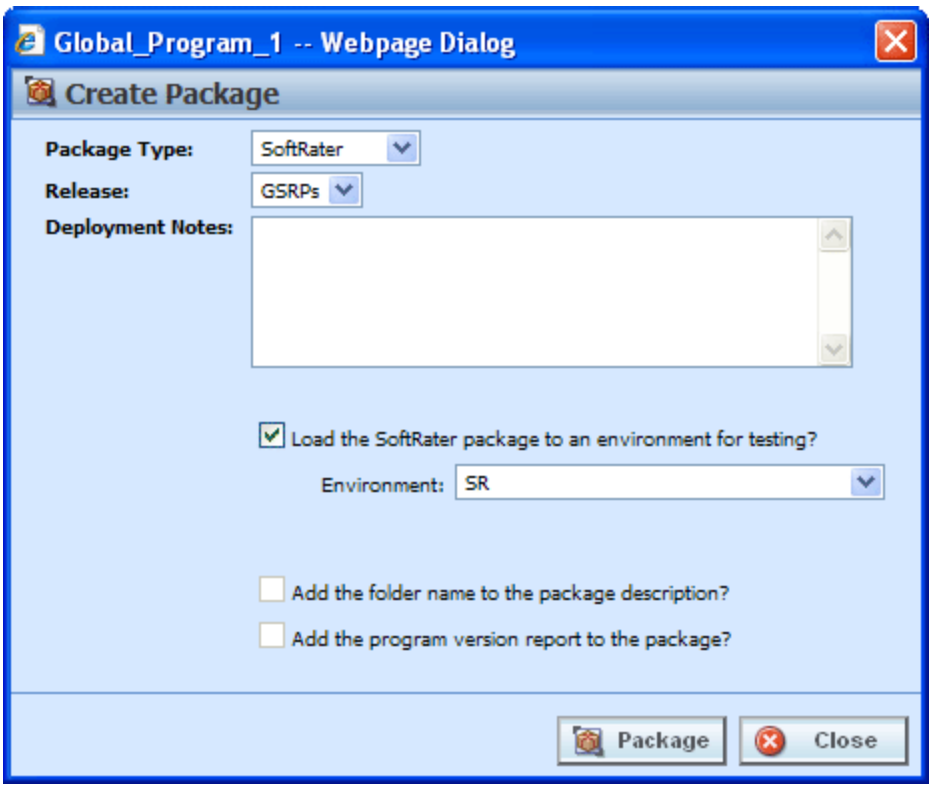


Figure 255 Creating a Global Versioning Package

3. When you have finished setting the package options, click **CREATE PACKAGE**. The packaging process will start and the progress will be shown. A summary will be shown when packaging is finished.

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

   - **RateManager**
   - **SoftRater**

   Release: If you are creating a SoftRater package, this allows you to set the environment the package will initially be placed on. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created.

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

Deployment Notes: If you a creating a SoftRater package, this allows you to enter comments about the package. The comments are viewable from the SoftRater Explorer.

Load the SoftRater package to an environment for testing: Check for Yes, leave blank for No. This option will be available if the system has been setup to allow release override.

Environment: If you checked Yes for loading SoftRater package to an environment for testing, you must select the environment that the testing package will be loaded to. This option will be available if the system has been setup to allow release override.

Add the folder name to package description? Check if you would like to add the folder name to the SoftRater package description.

Add the program version report to the package? Check if you would like to add the program version report to the SoftRater package. See Program Version Report.

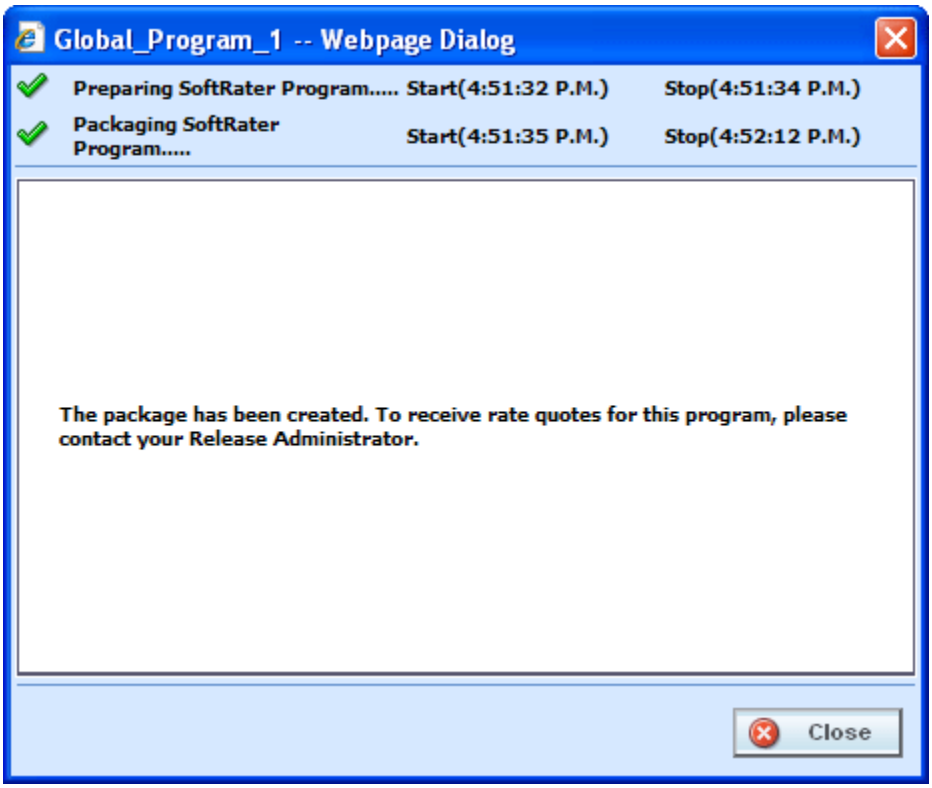


Figure 256 Global Packaging Success Message

4. If you created a RateManager package, you can navigate to Testing to rate input files and test version selection. If you created a SoftRater package, you can navigate to the SoftRater Explorer to load the package.

Creating a Global Versioning Package: Not Allowing for Override

System administrators set override options. If the system does not allow for overrides, the create global versioning package options screen will have a different look. You will not be able to select the release or the environment to publish. All other options will be available.

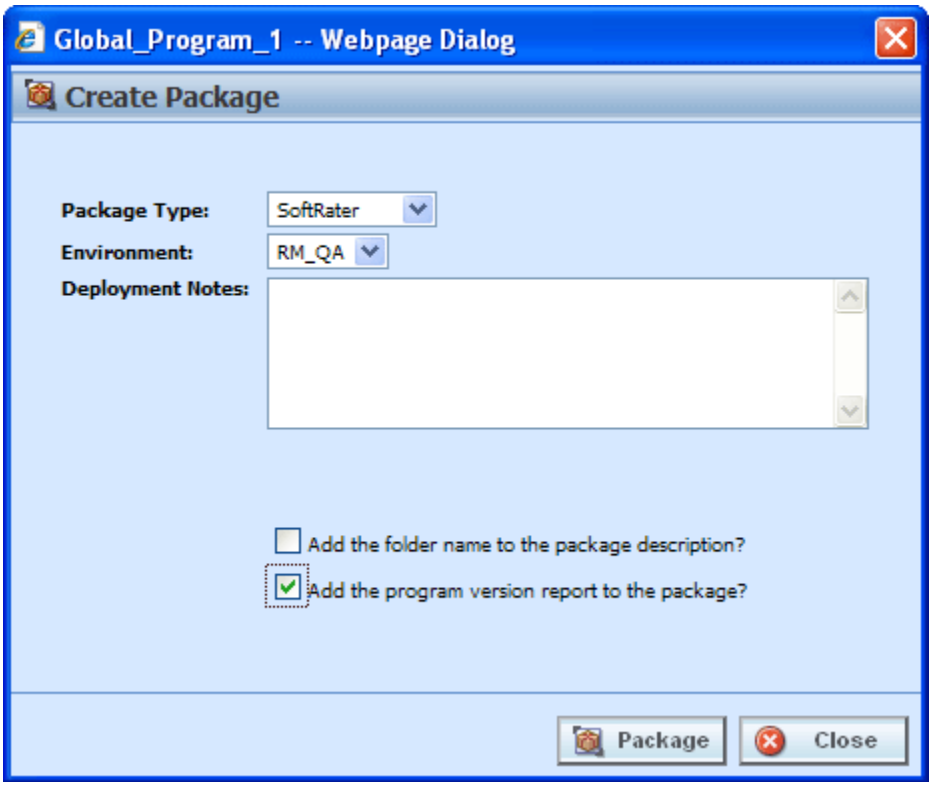


Figure 257 Creating Global Versioning Package Options Not Allowing for Override

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

- **RateManager**
- **SoftRater**

Environment: If you are creating a SoftRater package, this allows you to set the environment the package will initially be placed in. After packaging, the package will be available for download by any environment on the network that has the security authorization to see the packages that have been created.

Deployment Notes: If you a creating a SoftRater package, this allows you to enter comments about the package. The comments are viewable from the SoftRater Explorer.

Add the folder name to the package description? Check if you would like to add the folder name to the SoftRater package description.

Add the program version report to the package? Check if you would like to add the program version report to the SoftRater package. See Program Version Report.

RESOLVING PACKAGING ERRORS

There are many reasons why RateManager won't allow a program to be packaged. Usually, however, the reason is simple and resolution is easy. Listed below are the most common packaging errors.

1. **There are no results mapped.** RateManager requires that your program have at least one result (output). This error means you don't have any result groups defined or that there are no results in the result group that is defined. To fix this problem, create results for the program and try the package request again. See Introduction to Result Mapping for more information.

2. **There are no algorithms in the sequence.** RateManager uses the sequencing to determine which elements (algorithms and variables) to process and the order in which to process them. This error means that you haven't added any algorithms to the program sequencing, or that none of the algorithms in the sequencing are activated. To resolve this error, add at least one algorithm to the program sequencing or activate one of the algorithms already there. See Sequencing for more information.

3. **At least one of the algorithms in the sequencing does not have an input used for the category.** SoftRater uses inputs to determine which categories need to be processed. If you receive the error below, it means that you have an algorithm in the sequence whose category does not have any inputs used.

   If there are no inputs associated with a category, this means that there is a category level elements in the program sequencing but that none of the elements in the sequencing uses that category level input.

To resolve the issue, you can do one of two things:

1. Deactivate all algorithms in that category.

2. Use an input for the category. (An algorithm does not have to directly use an input. The input can be used in a variable that is used in another variable, etc. that is eventually used by an activated algorithm.) No inputs are required for the Driver-Vehicle category.

TEST PROGRAM

The Test Program tab gives you the ability to create, execute, debug and maintain test scenarios within the program version where you are currently working. Testing and debugging of a program can either be done within the program using the Test Program tab, or using the Testing Module.

Test files are created and maintained within the Test Program tab using either the XML view or the grid view with text box fields for input values. Additionally, new and existing test files created outside of RateManager are accessible using the Test Program tab, or you can paste and rate your own XML files. While it is possible to test multiple programs, you will not be able to save any changes to programs outside of the program where you are currently working. It is recommended that you test programs outside of the program version where you are currently working in the Testing module.

Programs must be packaged before going through Test Program. If you enter Test Program and the only category is Policy, then you may need to package the program. When you try to rate a program that has not been packaged, you will receive an error. If there is no package date, package your program and try again.

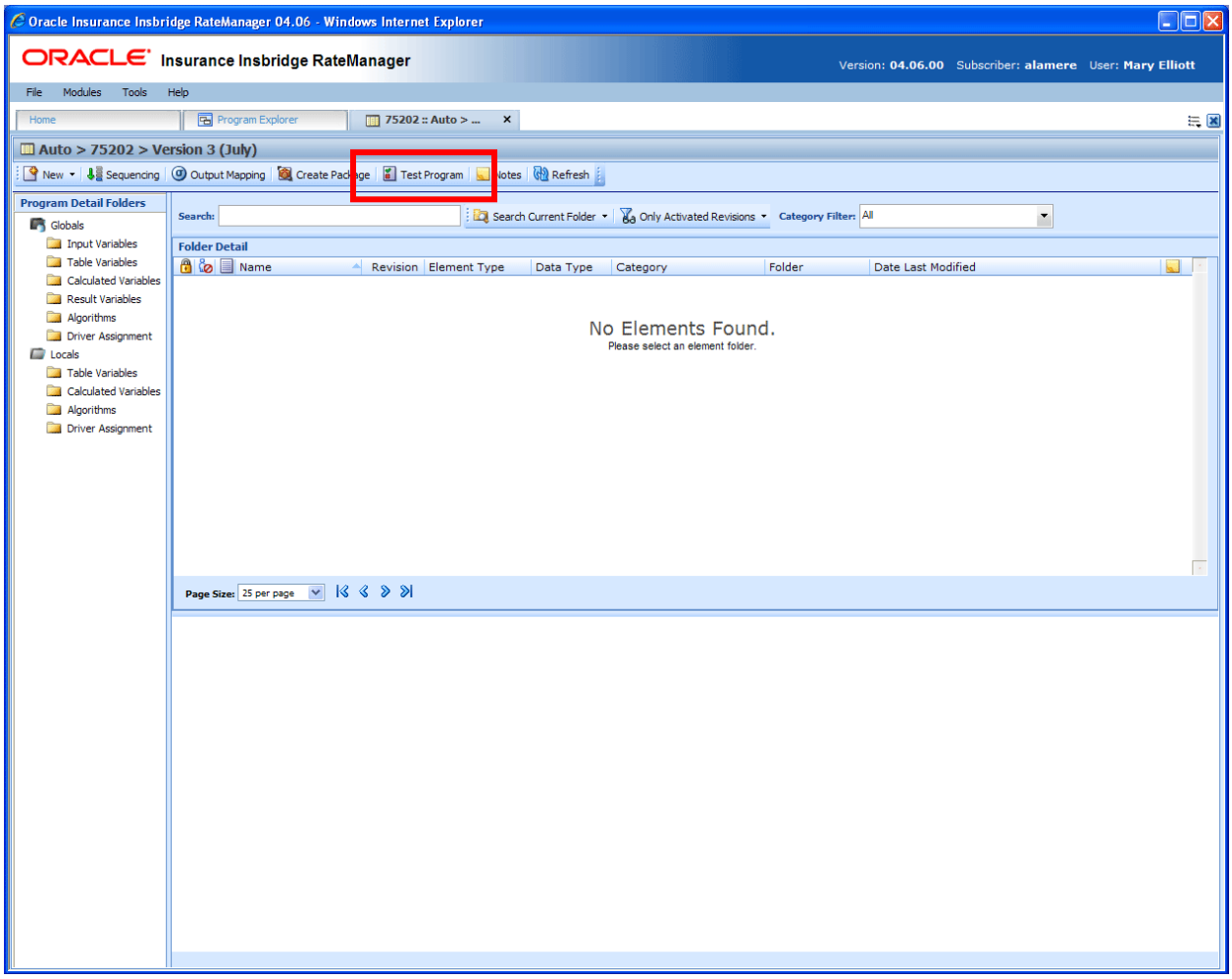


Figure 258 Selecting Test Program

Navigating to Test Program Tab:

Test Program will not be an option on the Program Explorer tab.

1. Modules→Program Explorer. This will open the Program Explorer tab.
2. Select the Line of Business→Subline→Folder→Program→Program Version.
3. **Open** the program version to get the Program Details tab. Test Program is available from the menu bar at the top of the tab.

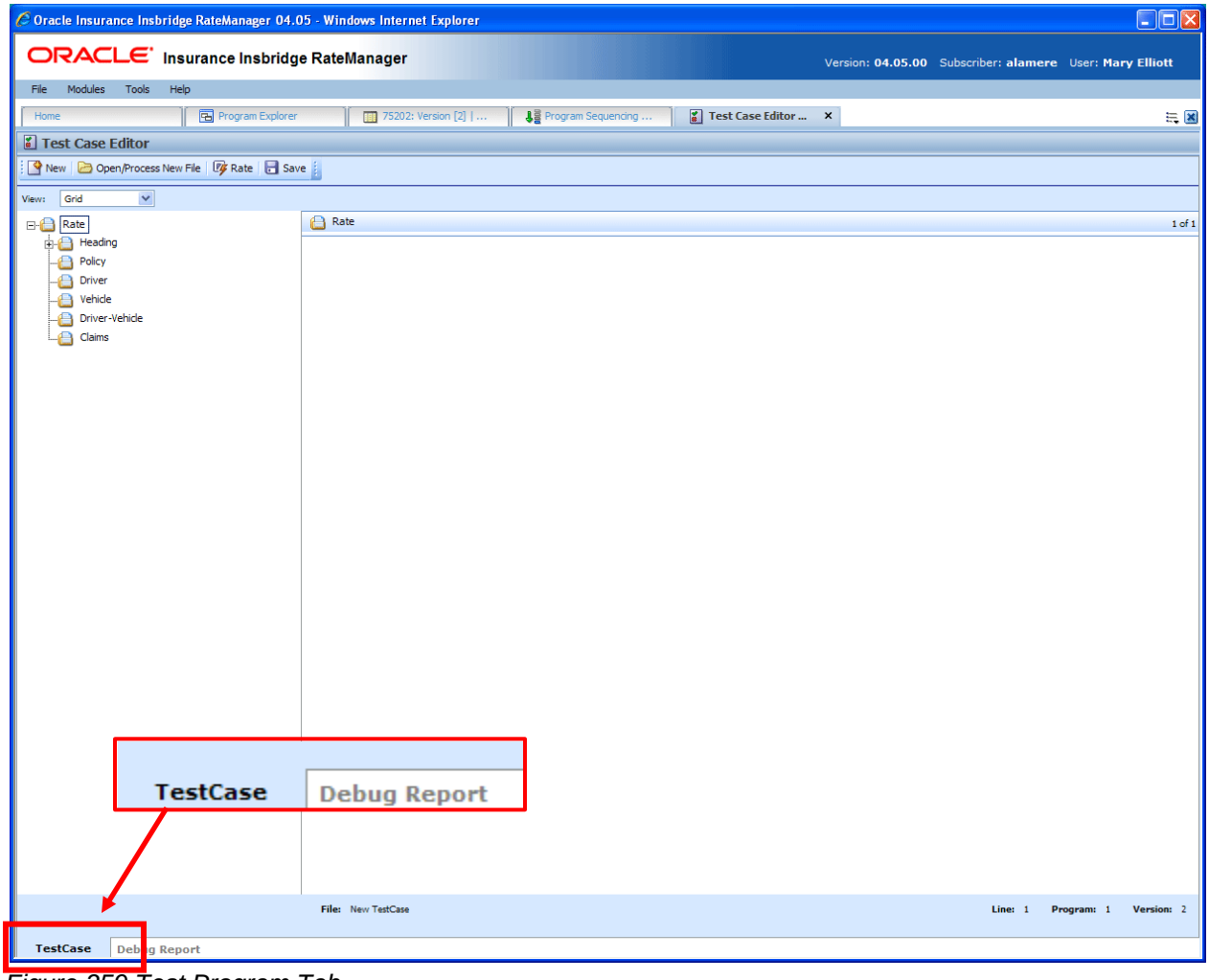


Figure 259 Test Program Tab

Test Program may also be accessed through Program Sequencing and Output Mapping tabs. Be aware that if you have made any changes to sequencing or mapping, you will need to package the program prior to using Test Program.

There are two sub-tabs on the Test Program tab:

- **Test Case**: Displays the program inputs and allows you to enter values for testing.
- **Debug Report:** A detailed report of the rating.

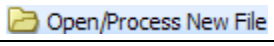
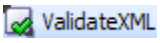
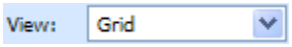
TEST CASE TAB

The Test Program tab has two sub-tabs: Test Case and Debug Report. By default, the Test Program tab will open on the Test Case sub-tab.

FUNCTIONALITY

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

Functions:

	New: This option will clear all fields and allow you to create a new test case. You will be asked if you want to save any previous entries. See Creating a Test Case for more information.
	**Open:** Allows you to browse for existing test cases.
	Rate: Rates the current test case.
	**Validate XML:** Available in XML View only. Validates your XML entries to make sure they are formatted correctly. Values are not validated only format.
	Save: Saves the current test case. This option is only for test cases within the program version.
	**View:** Allows you to switch between XML view and Grid view. When opening a new test case, Grid view is always the default.

Fields:

Category Selection: In Grid View, the left side of the tab will contain the categories of the program. You also can add, delete and copy categories as needed. In XML View, this area will not be displayed.

In grid view the RATE, HEADING and POLICY nodes will be present.

- The RATE node contains the LOB and the rating environment information. The default environment will be used unless you select another environment.
- The HEADING node contains the program information, parent ID, program ID and version. You will not be able to change this information.
- The POLICY node contains the inputs for the policy category. You can make as many changes as you need. Other categories will be listed underneath.

Input Assignment: In Grid View, after making a selection from the categories selection area, the input assignment area will be populated with the inputs from the program. You can enter values directly into these fields. In XML View, the tab will display an XML file where you can enter values.

Views:

There are two views available. Grid view is the default.

Grid View

In Grid view, the left hand window of the Test Program will show the categories and category structure created for the program. When a specific category is clicked, the right hand side of the tab shows the inputs available for the chosen category.

See Creating a Test Case in Grid View for more information on creating a test case in Grid view.

XML View

In XML view, an editable XML file is displayed. You can edit this file by typing values into the "V" attributes of each available input. You also will be able to cut and paste.

See Creating a Test Case in XML View for more information on creating a test case in XML view.

Right Click Options:

In Grid View, the Category Selection area on the left hand side will have a right click menu that allows you to add, copy, or delete. The Heading and the Policy category will not have a right click menu.

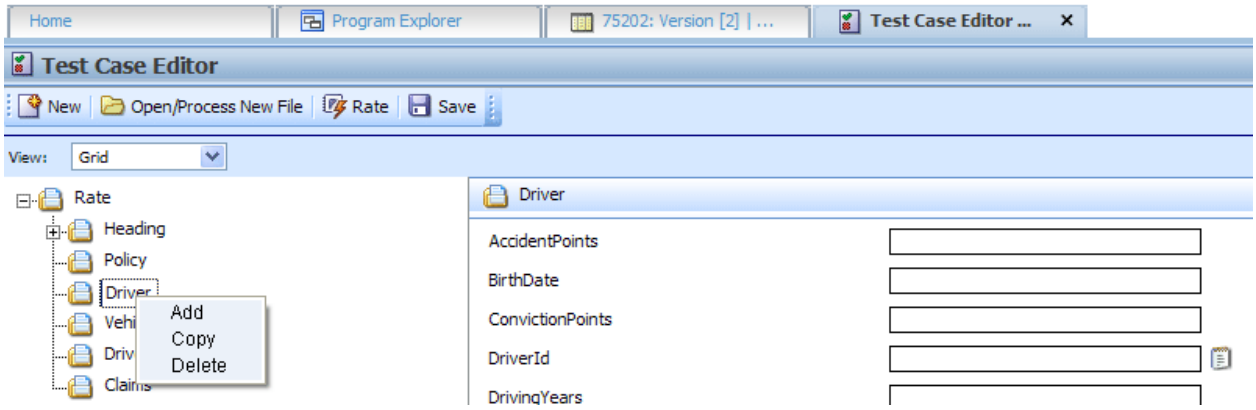


Figure 260 Right Click Menu for Test Case

- **Add**: Adds another category. Use this when you need to account for multiple entries in the same category. For example, you may need to add another vehicle category to accommodate two cars in the rating.
- **Copy**: Use this when you want to copy a category and the contents. For example, if you have two vehicles and with only two differences between them. You can complete the category and then use the copy feature to copy the category. On the second entry you can change the differences.
- **Delete**: Use this to remove a category that is no longer needed.

The XML View does not have a right click menu.

Creating a Test Case in Grid View

1. Navigate to the Test Program tab for the desired program.

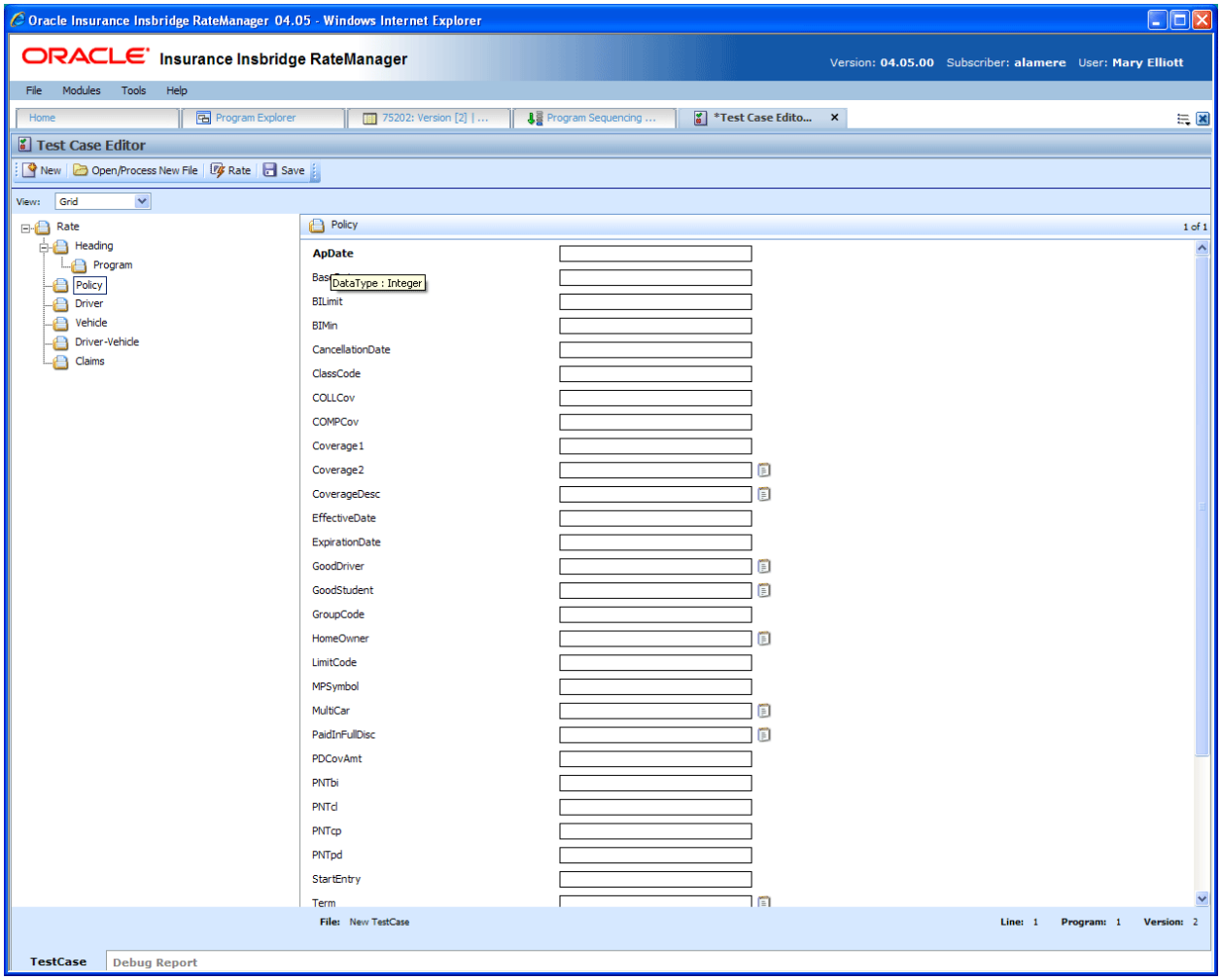


Figure 261 Inputs for Selected Category

2. If not already displayed, choose Grid from the view menu.

3. In the left hand window, click on the category name where you want to enter data. The right hand window will display the applicable inputs for the chosen category.

4. In the right hand window, you will have two options, entering a value in directly or selecting from a pre-populated list. You also will be able to copy and paste entries.

NOTE: *Hold your cursor over the input to view the input data type.*

   a. To enter in a value directly, select the field and type in your entry.
   b. To select a value for string input types, click the icon at the end of the field. This will bring up a popup menu.

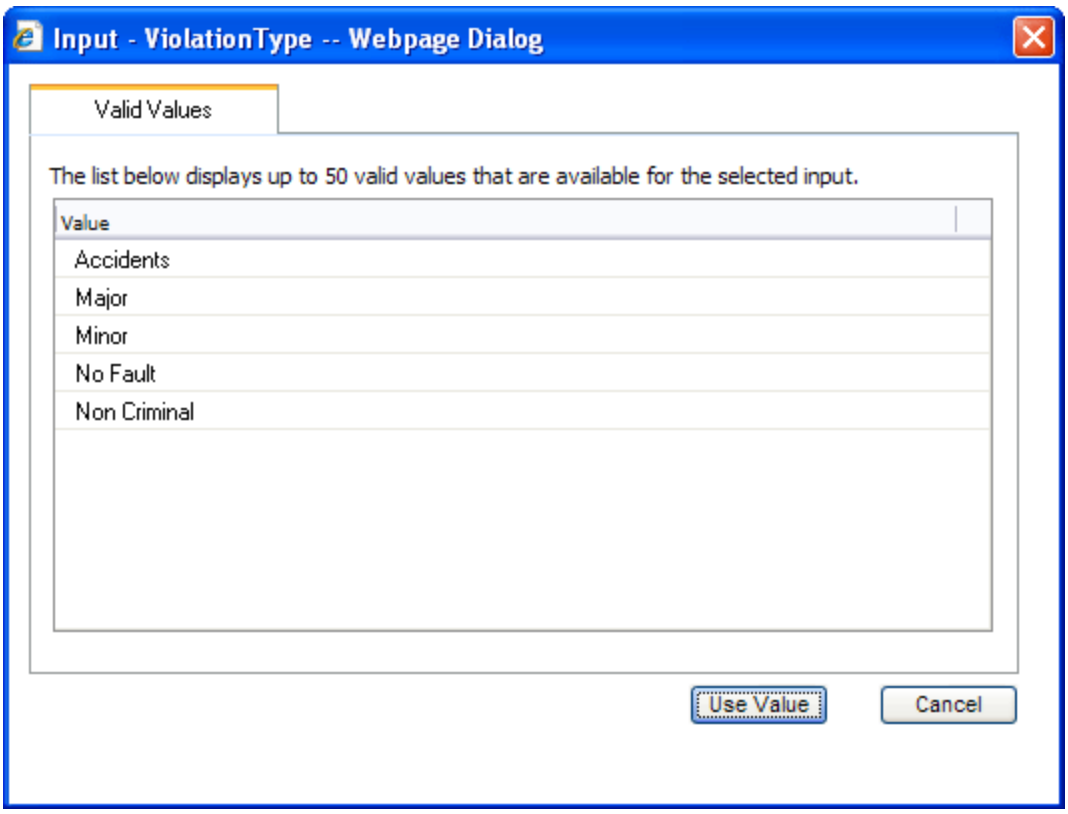


Figure 262 Entering Inputs in Test Program

c. Select the option you want. Click **USE VALUE**. This will close the popup and return you to test case. Your selection will be filled in the field. If no valid values have been entered for this field, the list will be empty. You will have to enter a value in directly.

NOTE: *You also can enter in a value for string inputs. You are not required to use the notepad icon.*

5. Repeat Steps 3 and 4 for each category and input for the test case.
6. When you have finished entering your inputs, click **RATE** to rate the test case.
7. The Test Case sub-tab will switch to the Debug Report sub-tab once the test case has finished rating. See Using the Debug Tab for more information.
8. If you would like to save your test case, return to the Test Case sub-tab.
9. Click **SAVE** to save the test case.

Retesting

You can clear the fields and begin your test case again by clicking **NEW** in the top menu bar. This will clear the fields and allow you to enter new values for testing. Any new or deleted categories will also be cleared or added back to the test case.

Prior to clearing the fields, you will be asked if you want to save your current entries.

Saving a Test Case

Only test cases that are within the program version can be saved. Non program version test cases cannot be saved in the Test Program tab.

The save screen allows you to specify a unique name for the test case. Unique names allow you create multiple scenarios. For example, you can use one set of values for your inputs and save that test case. Then change the values and save the test case under another name. You can save as many test cases as you need. Saved test cases will be listed in the body of the Server Files window. All test cases saved in Test Program will be saved to the server.

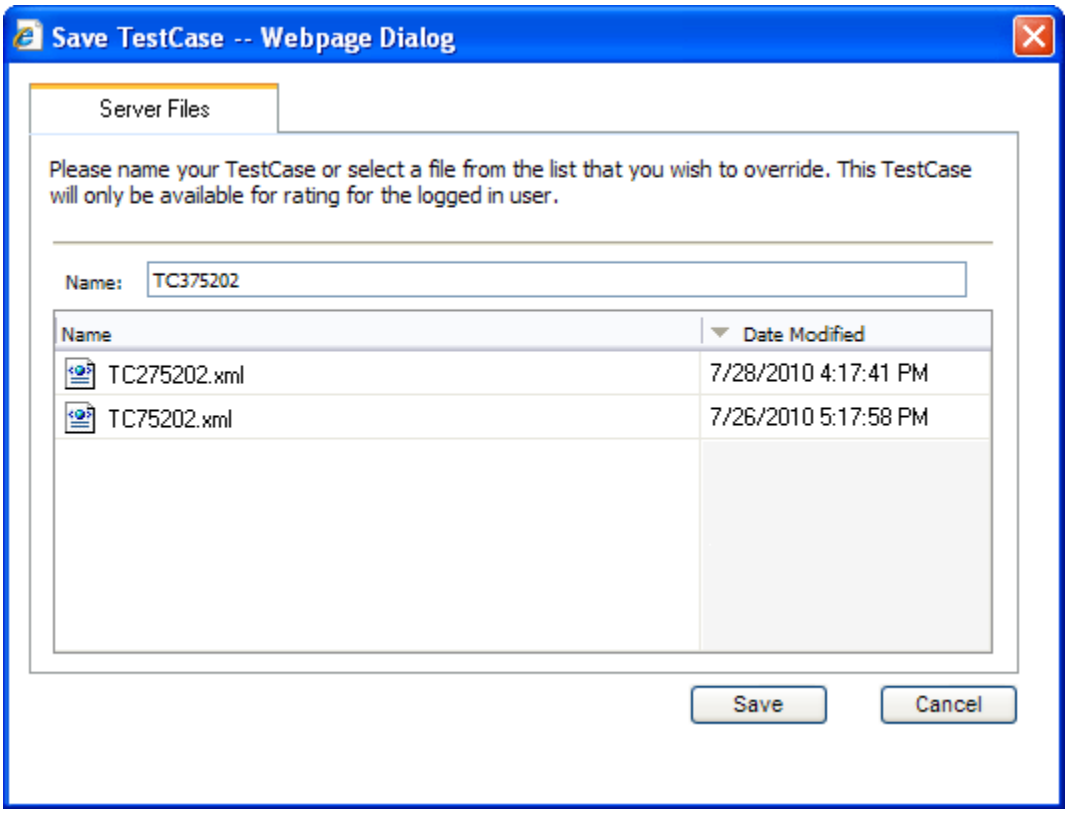


Figure 263 Saving Test Case Files

If you would like to work with your test case on the Testing module, make sure you save your file. Files that are saved to the server also will be available on the Testing module.

Creating a Test Case in XML View

In XML view, an editable XML file is displayed. You can edit this file by typing values into the “V” attributes of each available input. You also can delete or add inputs and you will be able to copy and paste. Inputs can be validated for proper formatting.

1. Navigate to the Test Program tab for the desired program.

2. Choose XML from the view menu.

3. An editable XML file of the program will be displayed. You may manually edit this XML file to create a test case.

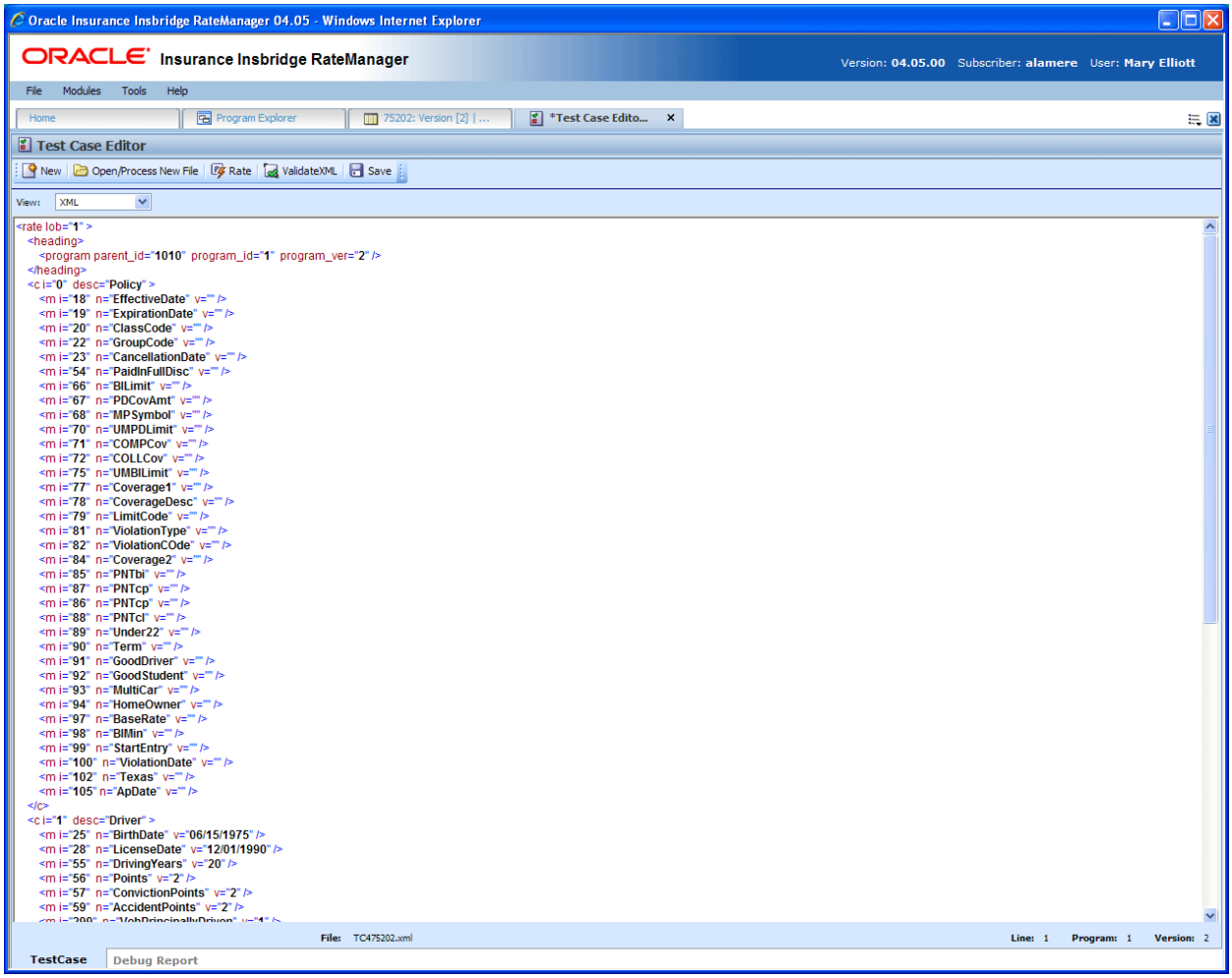


Figure 264 Test Case XML View

4. Click **VALIDATE XML** to validate the XML before rating the test case.

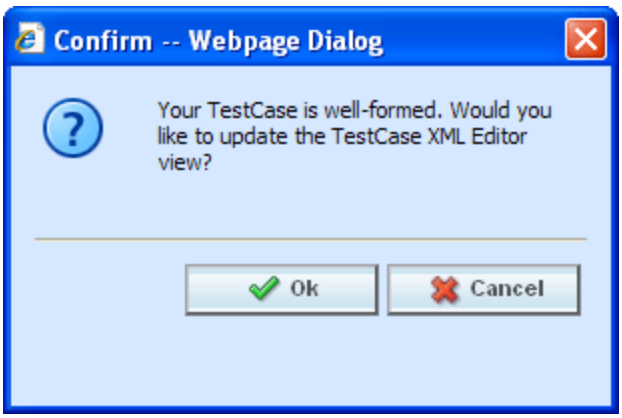


Figure 265 XML Validation

5. If the file is formatted properly, you will receive an update message. If there is a problem with your file, you will be instructed to make changes. Click OK when your file is ready.

6. Click **RATE** to rate the test case.

7. The Test Case sub-tab will switch to the Debug Report sub-tab once the test case has finished rating. See Using the Debug Tab for more information.

8. If you would like to save your test case, return to the Test Case sub-tab

9. Click **SAVE** to save the test case.

DEBUG TAB

You will have the ability to view debug reports from the Test Program tab without having to go to the Testing Module. Rating a test case will switch you to the Debug Report sub-tab.

Rating Summary information will be at the top, followed by detailed Category Information. The execution order is listed next.

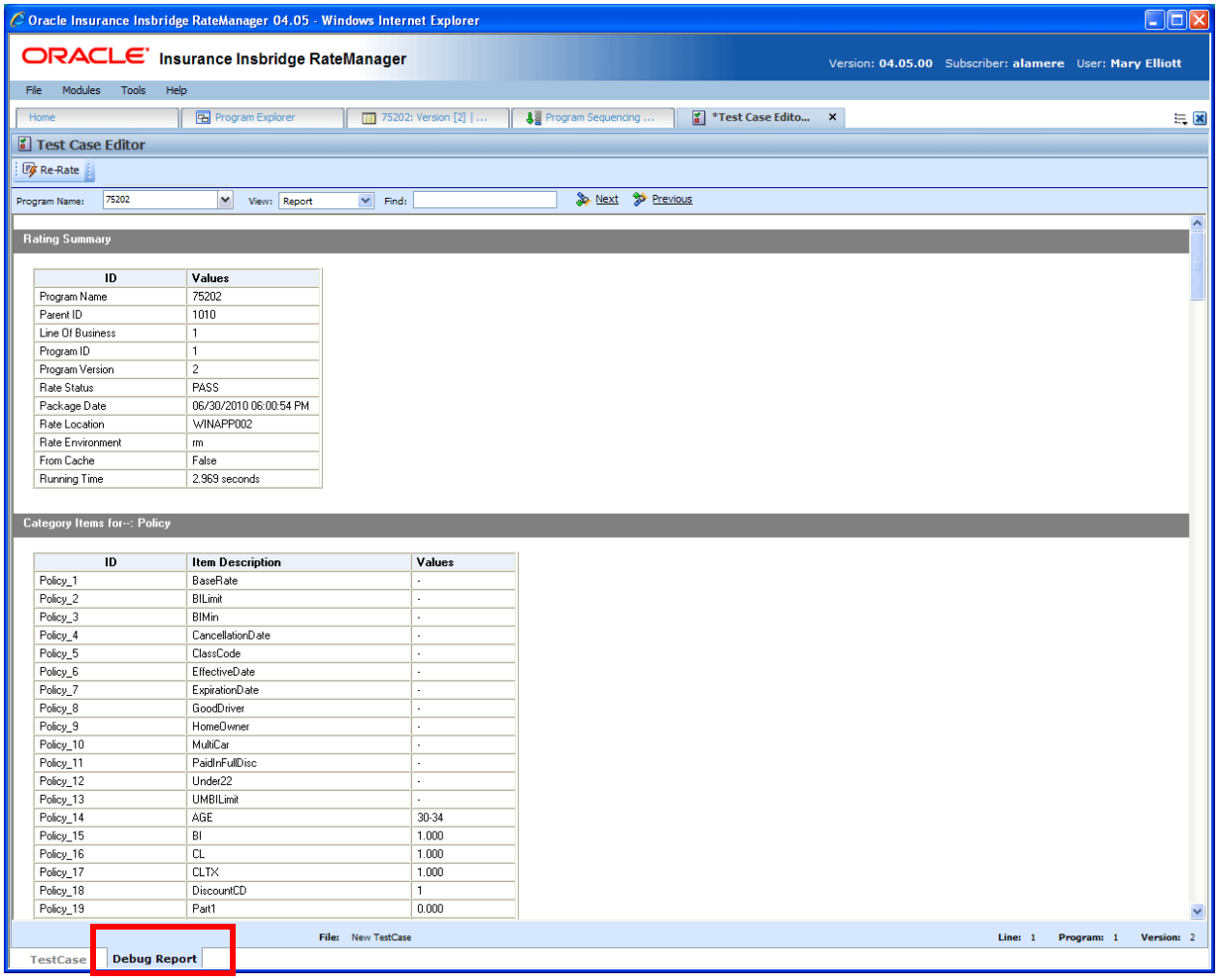
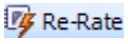
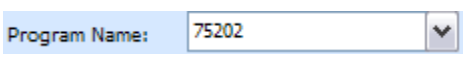


Figure 266 View Debug Reports

Functions:

	**Re-rate:** Re-rate will rate the selected test case and replace any pre-existing debug report with the newly rated one.
	**Program Name:** Displays the name of the program being rated. The drop down menu is populated when you are rating multiple programs using MultiLines. See MultiLines Programs for more information.

View: XML	**View:** The debug tab will automatically show results in a report view. You may change this view to show the raw XML output.
Find:	**Find:** Allows you to search through the debug report for a specific alpha/numeric character string.
Next	**Find Next:** If a search is performed, Find Next will navigate to the next place in the debug report that a match was found.
Previous	**Find Previous:** If a search is performed, Find Previous will navigate to the previous place in the debug report that a match was found.

Fields:

Rating Summary: A summary of program information.

Category Items: Elements in the rating listed by category.

Advanced Options

Advanced Algorithm Looping will be displayed on the Debug Report.

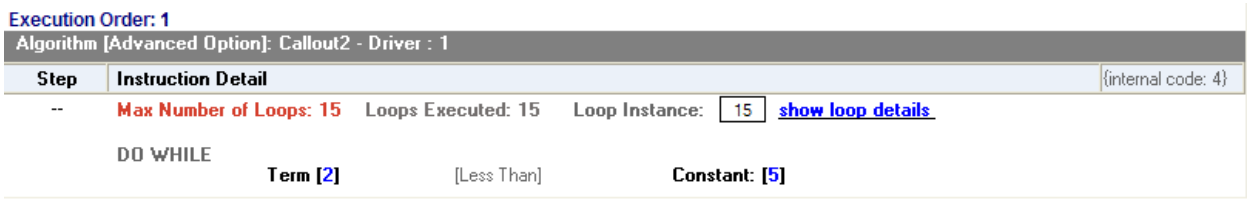


Figure 267 Advanced Options in Debug

In the gray information bar you will see the [Advanced Option] indicator. The DO WHILE condition that caused the looping will be listed, as well as the details of the condition. The maximum number of loops and the number of loops performed will be displayed.

The Loop Instance will show the number of the last loop run. To view the details of this loop, click the hyperlinked **show loop details** link. This will place you on the looping details screen. This screen will only display the details of that loop. You can view any loop run by entering in the number in the Loop Instance box. For example, if you wanted to see the details of loop 9, you would enter 9 in the Loop Instance box and click the **show loop details** link. The properties of the 9th loop would be displayed in a separate screen.

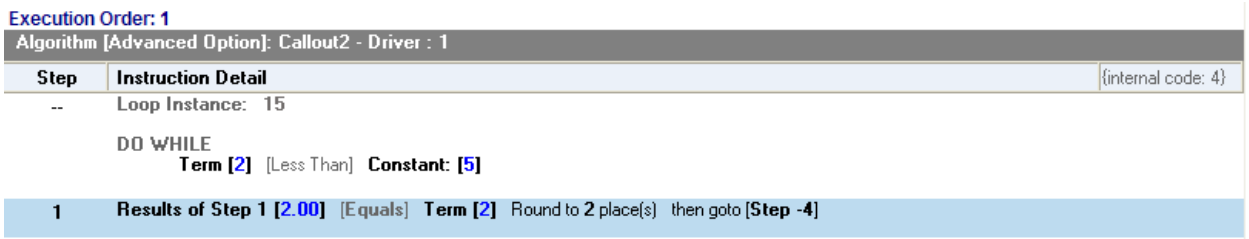


Figure 268 Looping Details

The looping details screen contains the summary policy information and the looping algorithm information. If any result variables were set during the looping, a table will be displayed at the top of the tab, organized by loop iteration.

Debug Report XML

Debug reports also can be displayed as XML. You will be able to expand and reduce nodes as well as enter values and re-rate.

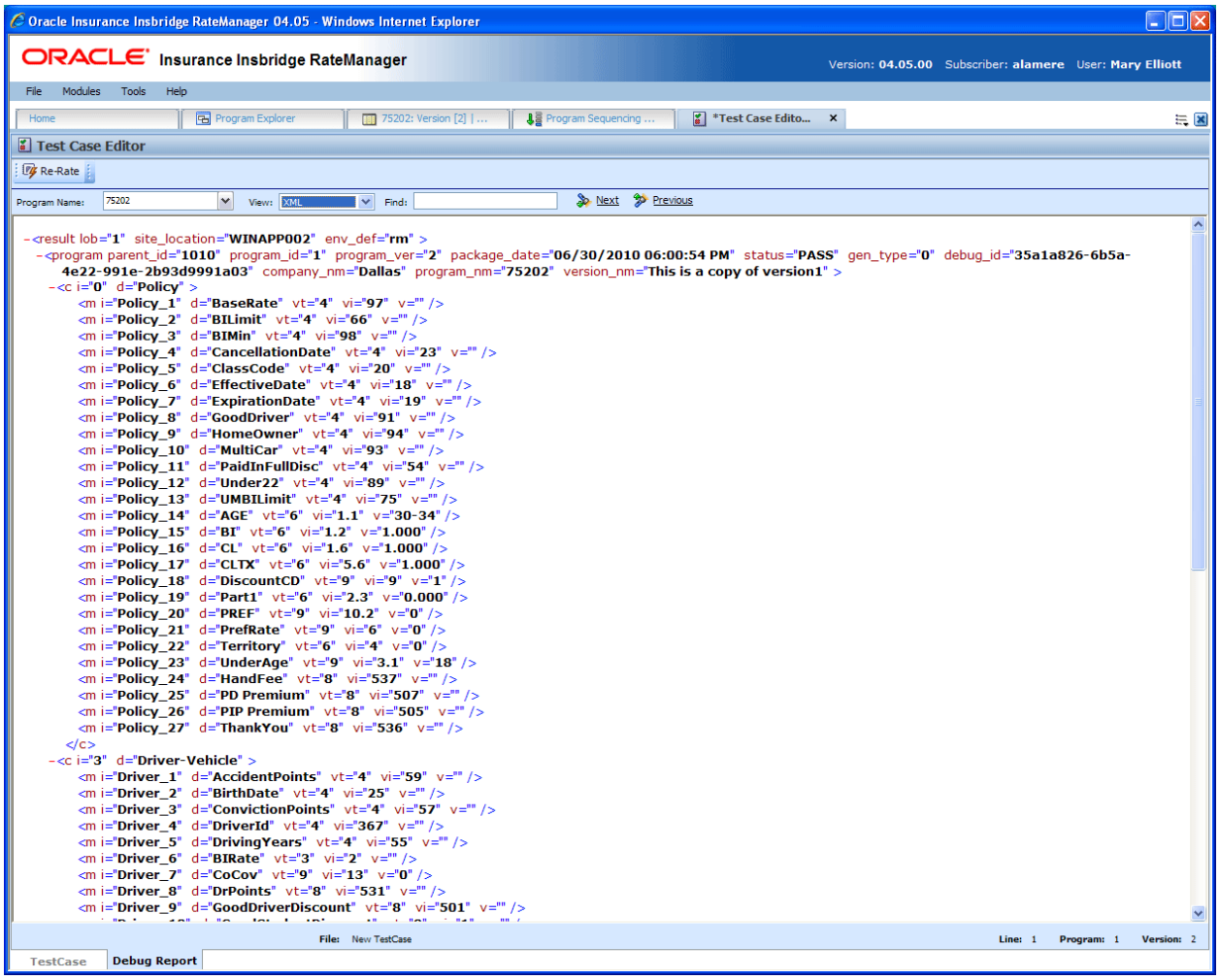


Figure 269 View Debug Reports XML

See Debug a Rating Report for more information on using the debug report.

NOTE: *The date format used by Test Case Editor will be in ISO format YYYY-MM-DD. This may not reflect the date format used by the program.*

Opening an Existing Test Case

You can open a saved test case by clicking the Open/Process New File option in the top bar menu. This will bring up a dialog window where you can select to open a test case associated with this program version or one saved to your local machine or network.

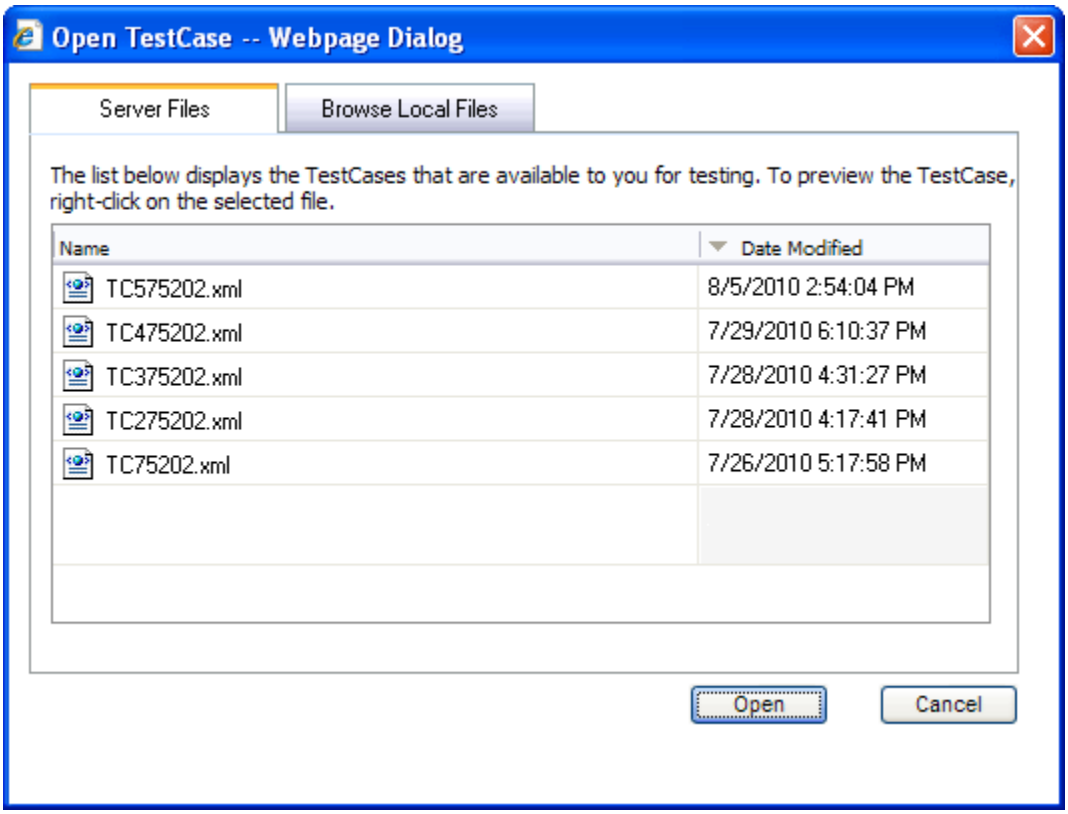


Figure 270 Opening a Test Case

There are two tabs:

- **Server Files**: These are the test cases associated with this program version. Test case files saved within the Test Program tab are saved to server files.
- **Browse Local Files:** These are the files saved outside of the Test Program tab to your local machine or network. You can test these files but you will not be able to save any changes. If you want to make changes to these files, please return to the source program or use the Testing Module.

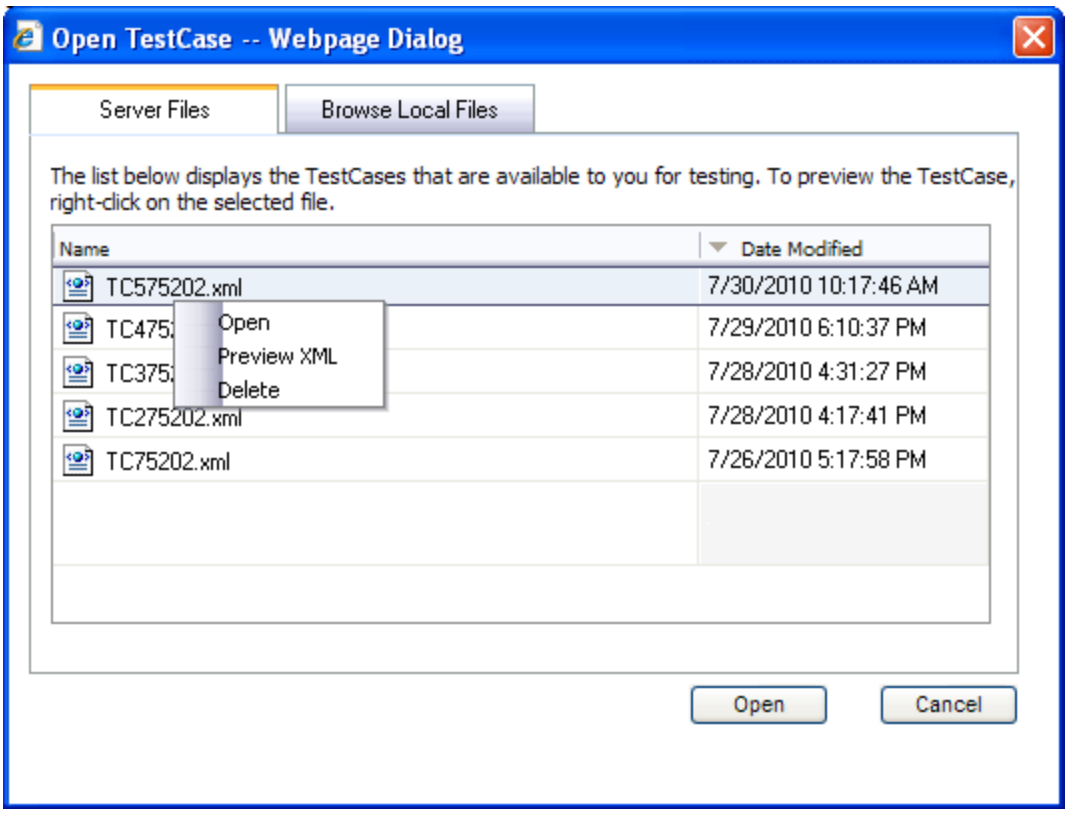


Figure 271 Right Click Menu for Opening Test Cases

Server files also have a right click menu. There are three options:

- **Open**: Will open the file in Test Program.
- **Preview XML**: Will display the XML in a separate screen. Preview will allow you to copy the XML file.
- **Delete:** This will delete the file. Deleting the file from here will also delete the file from the Testing module.

You will not be able to open a test case file outside of the version where the test case was saved. If you have created multiple test cases in version two of a program, you will not be able to open those test cases from version 4. You will have to enter version two or work in the Testing module.

Test Case Error

If there is a problem with the test case, an error message will be displayed at the top of the debug report. The error message “Unable to locate program version.” Will generally be displayed when you program is not packaged. To correct this error, package your program. You also can save this program without packaging and go to the Testing module. Unpackaged programs can be tested there.

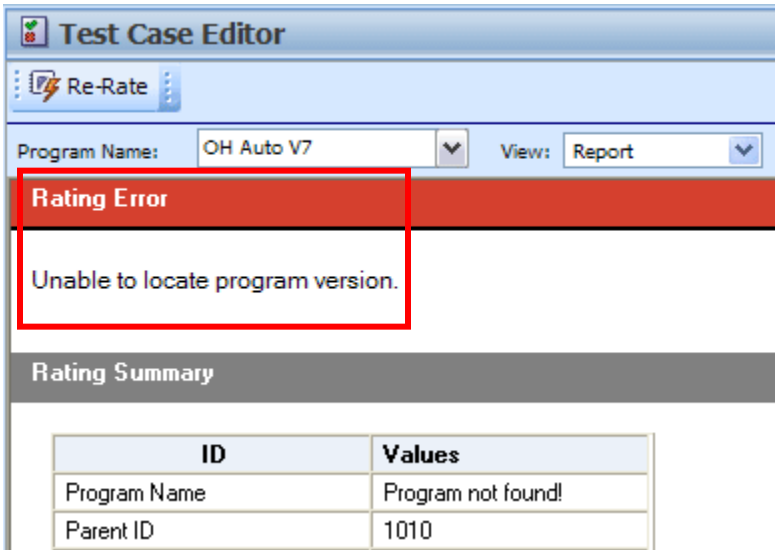


Figure 272 Test Case Error

Browse Local Files

You can browse to a test case XML file saved to your local machine or network.

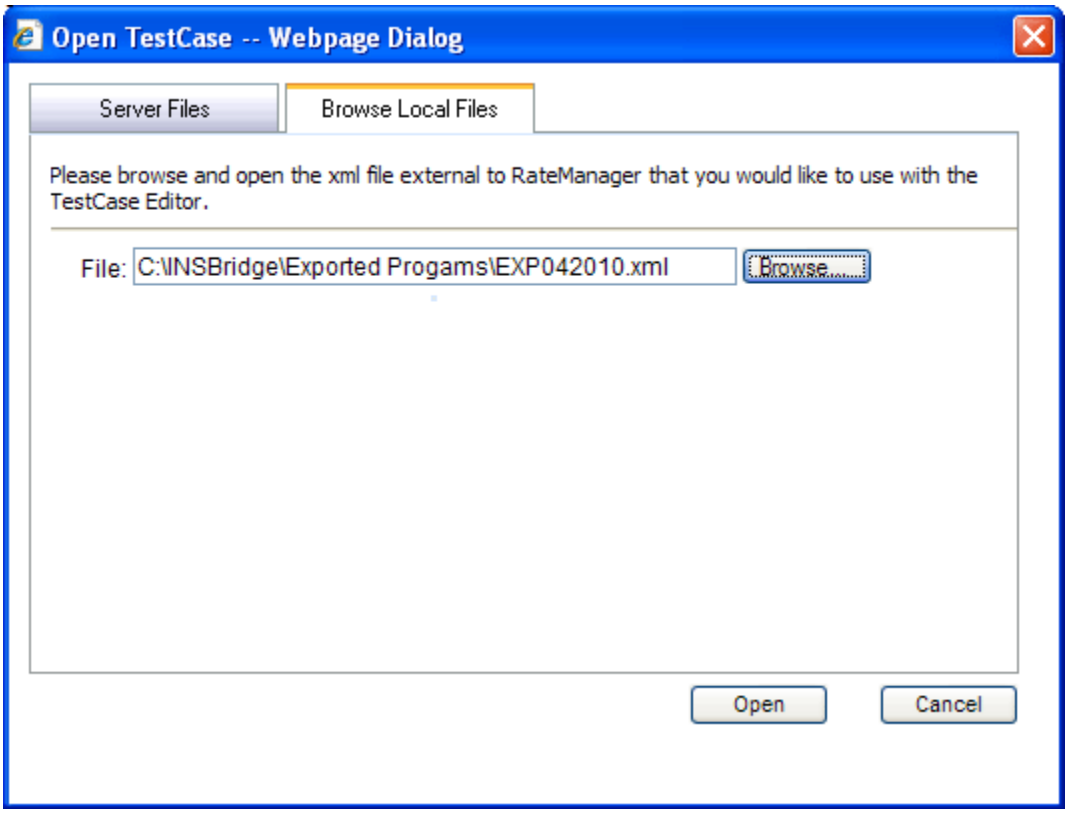


Figure 273 Opening a Local Test Case

To Open a File:

1. Select the file you want.
2. Click **OPEN** to immediately open the file.

If this is not the screen you wanted, click Cancel to close the dialogue box and return to the Test Program tab.

Chapter 25

TESTING

The Testing module is the testing tool within RateManager. It allows you to test your rating program during development, without the need to load packages. Testing interfaces with the local SoftRater to rate one input XML file against the tables, rules and logic created within RateManager and outputs a report.

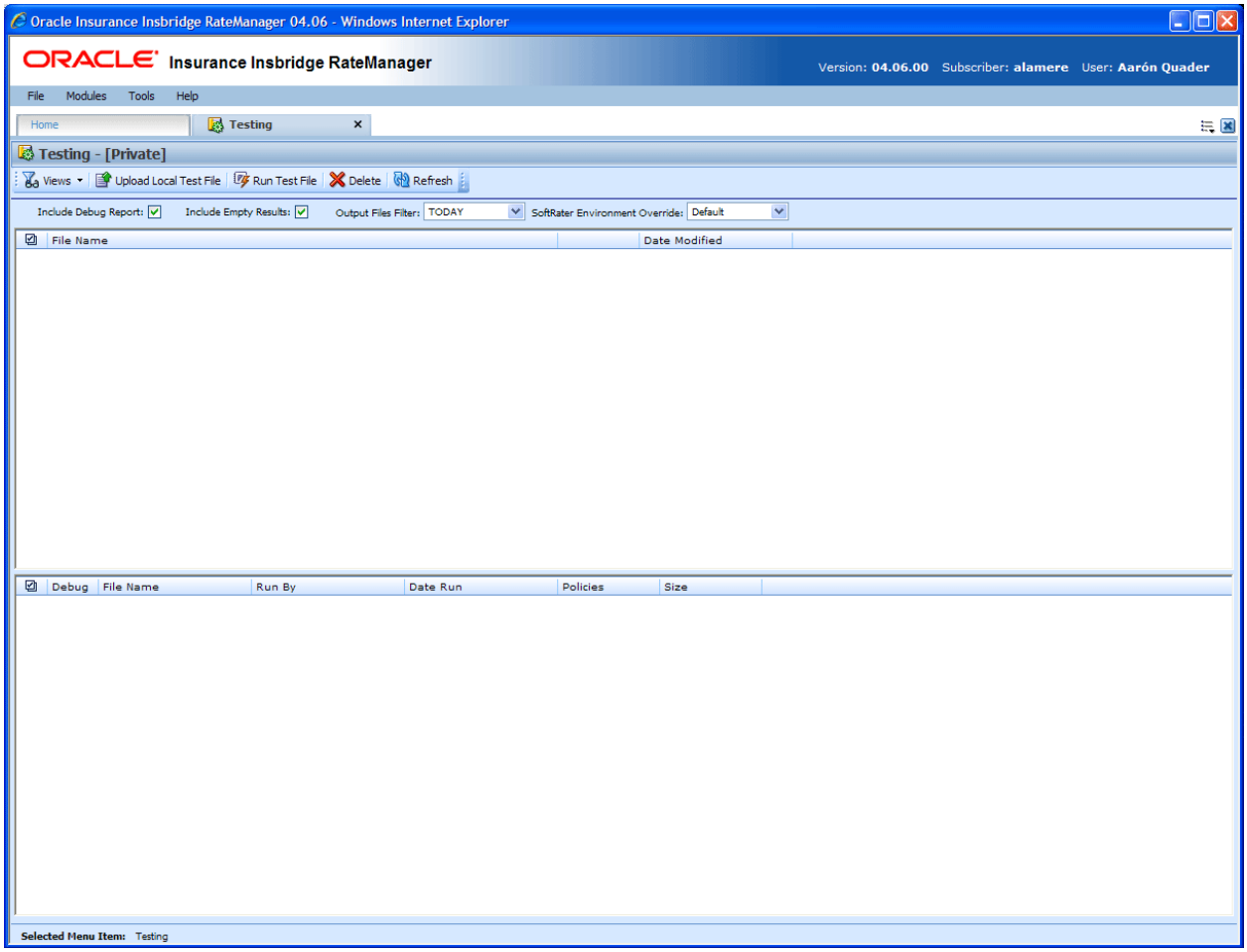


Figure 274 Testing

To Navigate to Testing

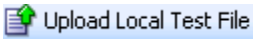
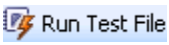
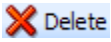
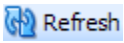
You must have permissions to view and manage the Testing module. If Testing is not an option, you do not have permission. Please contact your system administrator to have permissions added.

1. From the Home Tab, select Modules→**Testing**.
2. This opens the **Testing** module in a separate tab.

FUNCTIONALITY

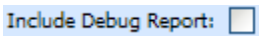
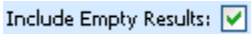
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab.

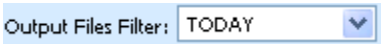
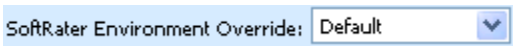
Functions:

	Views: Allows you to select the view you want. There are two views: • **Private view** contains test cases that are visible to the current user only. The default view is Private. • **Public view** contains scenarios that are shared by all users for this subscriber. **NOTE:** *The view you are current on will be on the banner above the menu bar.*
	**Upload Local Test File:** Uploads an XML input file located on your local machine or network to the Testing for rating.
	**Run Test File:** Rates an existing/displayed input file. To use, place a check in the box next to the File Name and select this option. **NOTE:** *You can also rate an existing/displayed input file by double clicking it.*
	**Delete:** Removes the selected file(s) from Testing.
	**Refresh:** Refreshes the listing of rated files. This is useful when looking at shared scenarios.

Definition Options:

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

	**Include Debug Report:** Checking this option sends the rate through debug. The debug report provides comprehensive detail of every variable and algorithm that is used within the program, walking you through each step of every calculation. You must check this prior to rating. Debug files are local to the Testing tab.
	**Include Empty Results:** Check this box if you would like to see all results. The default is for all results to be included. Unchecking this box will remove any empty results from the result report. Empty results are results with a null value. Zero value items will be included. Excluding empty results will produce a smaller report. You must check the Include Debug Report option to utilize this option. If you do not have Include Debug Report selected, you will not be able to select Include Empty Results.

	**Output Files Filter:** Allows you to filter the rated files by when the files were produced.
	**SoftRater Environment Override:** Allows you to select which environment to rate the XML Input File. • Default: selects the default environment. • Another Environment: if other environments have been entered, you may select one of those. **NOTE:** *If you select another environment, any defined environments in your ratings will be ignored.*

FIELDS

There are two areas on the Testing Tab.

- **Input File Listing:** Shows a listing of input files, sorted newest to oldest by the last date used time stamp.
- **Result File Listing:** Shows a listing of result files, sorted newest to oldest by the last rate date time stamp.

Input Files

The upper portion of the tab is the Input File Listing. The Input File Listing shows all the input files, sorted newest to oldest by the date modified time stamp. Files can be placed in this area either by being uploaded directly or by being saved in the Test Program tab. If the file you want to work on is not listed, you can return to the Test Program tab and save your file or return to Program Explorer and export your file to disk to upload directly.

The View you select also determines which files are listed, either Public or Private.

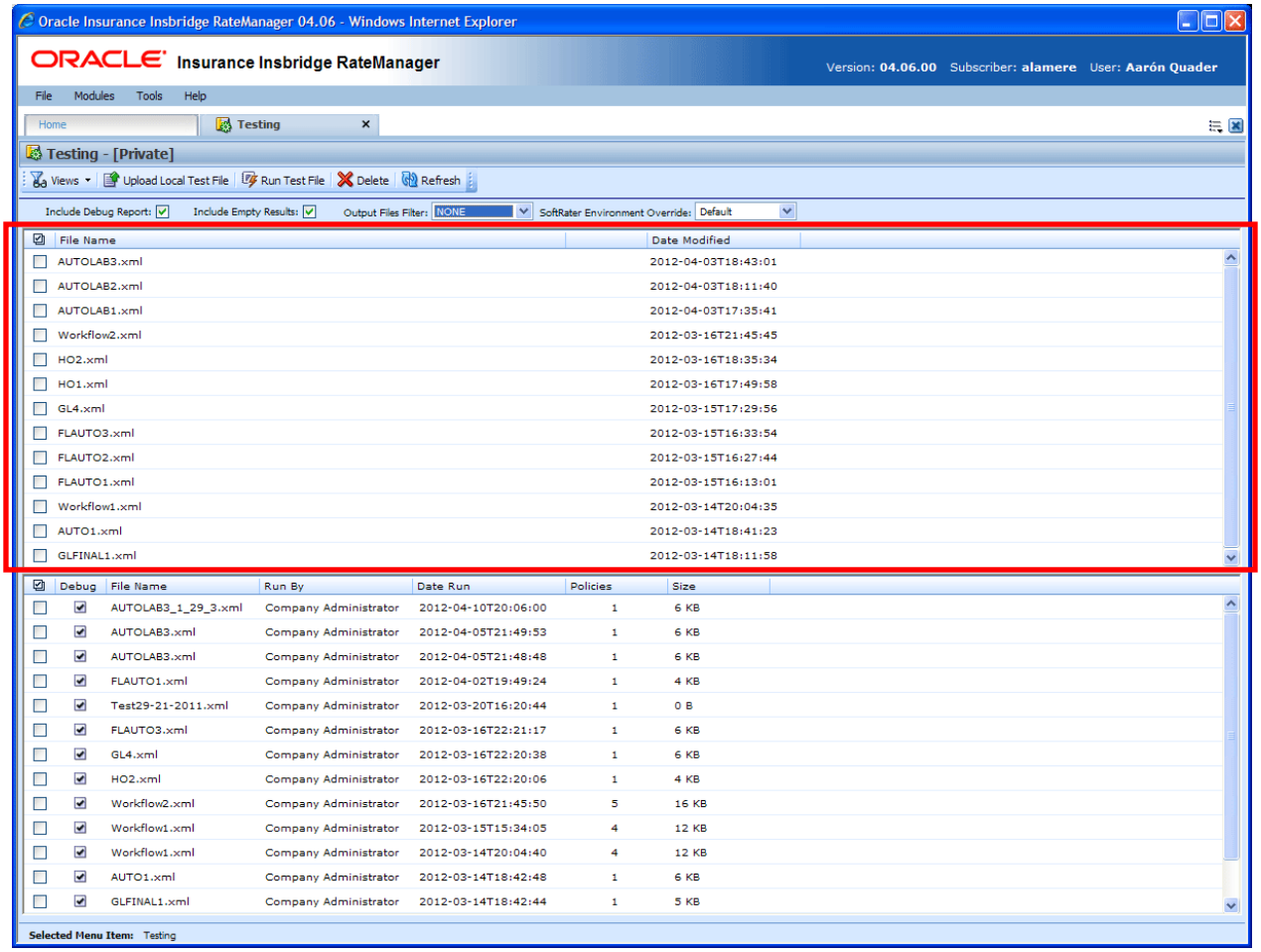


Figure 275 Input File Listing on Testing

There are three fields:

Checkbox: Used to select multiple files to delete or a single file to rate. The checkbox can also be used with View XML to view the files XML.

File Name: The name of the input file.

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

Result Files

Shows a listing of result files, sorted newest to oldest by the last rate date time stamp. To open a result file, double-click it. The Output File filter determines what files will be listed.

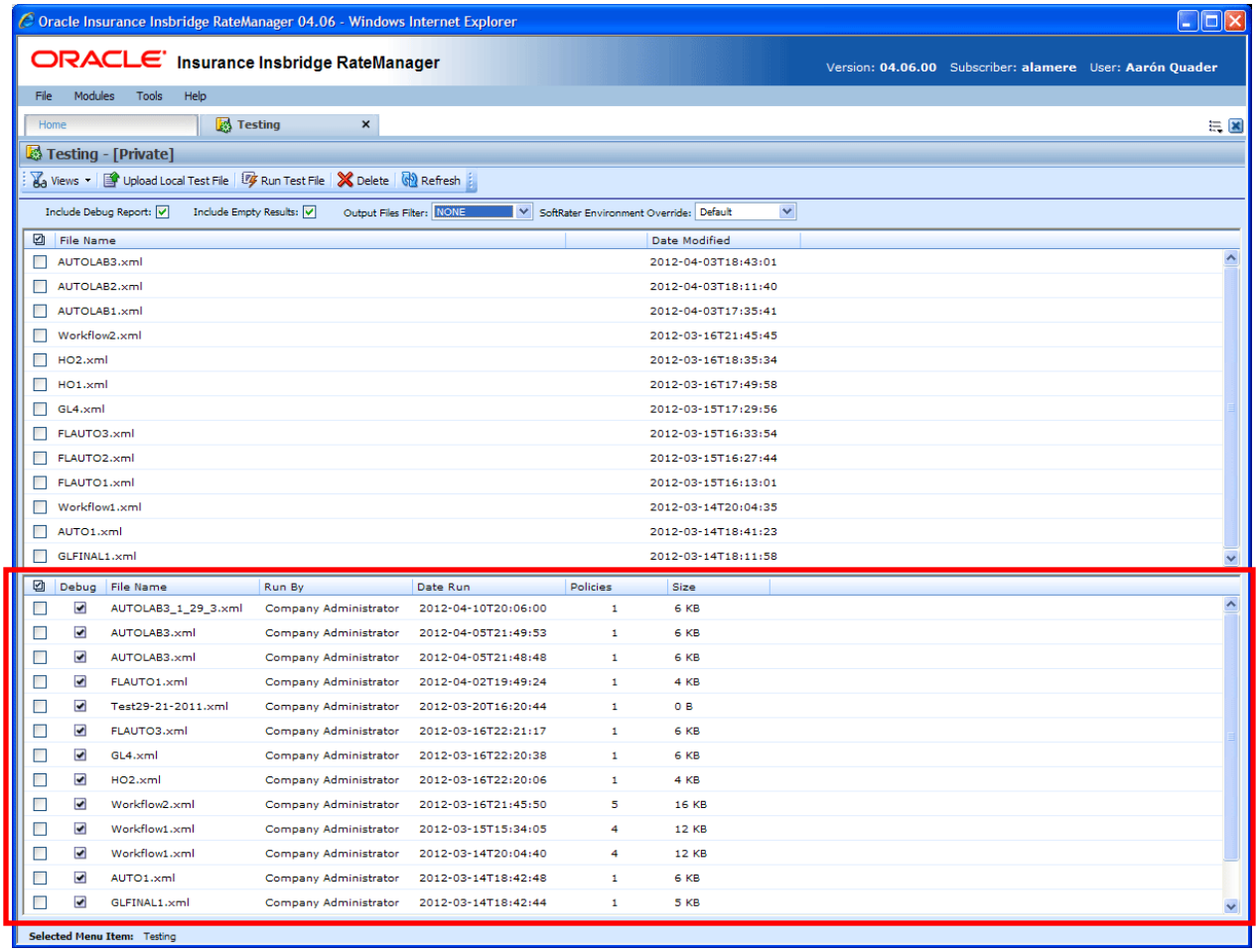


Figure 276 Result File Listing for Testing

There are seven fields:

Checkbox: Used to select multiple files to delete.

Debug: A checkmark indicates the result file is a full debug report.

File Name: The name of the result file.

Run By: The user that rated the file. This is useful when looking at shared scenarios.

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

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

Size: The size of the result file.

Right Click Menu Options

Both the Private and the Public views have the same right click menu options. There are six options for Input Files. Result Files have four options.

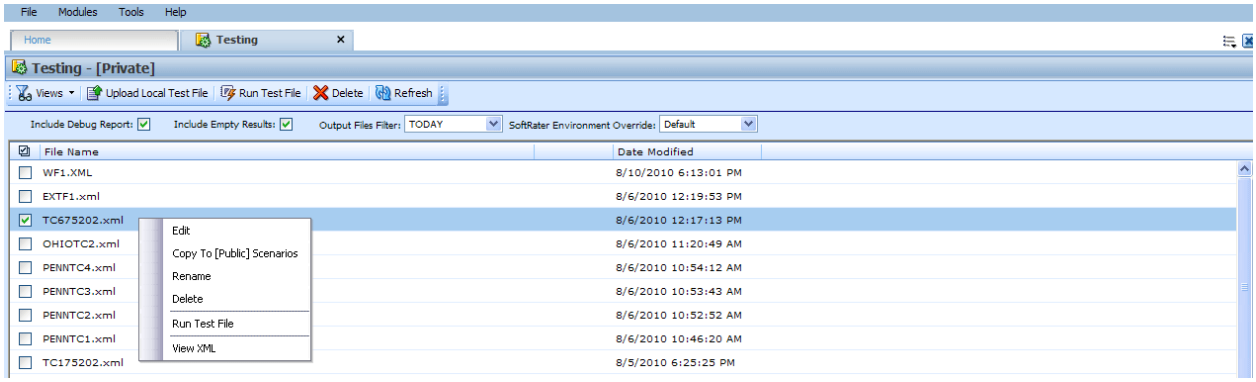


Figure 277 Right Click Menu for Testing Input File Listing

To view the Input File menu, highlight an input file and right click.

- **Edit:** Brings up the file in Test Program. The default view is XML however you can change to grid view if needed. The file can be edited and saved again. Custom and MultiLines files cannot be edited from Testing.
- **Copy to [Public] Scenarios:** Places a copy of the file in the Public view. If you are using a Public view, you can make a copy for your Private view.
- **Rename:** Allows you to rename the input file. A separate screen is shown. Enter in the New Name and click **Save**.
- **Delete:** Deletes the file. A warning message is displayed prior to the file being deleted.
- **Run Custom Input Mapping:** If the selected file contains a custom input mapping, selecting this option brings up the Custom Input Mapping dialogue box. This option is displayed on files that contain custom input mapping only.
- **Runs Test File:** Runs the selected file.
- **View XML:** Allows you to view the XML in a separate screen. This functions like **View XML** on the top bar menu.

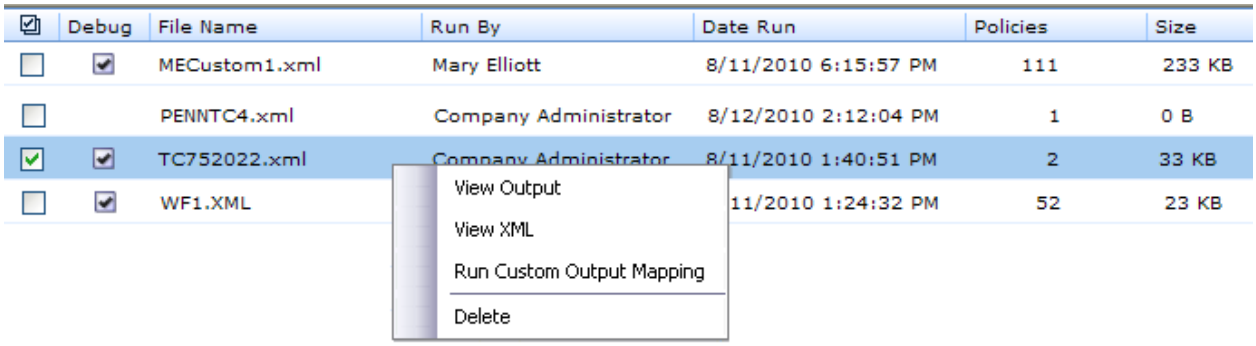


Figure 278 Right Click Menu for Testing Result File Listing

To view the Result File menu, highlight a result file and right click.

- **View Output:** Opens the result file in a separate window.
- **View XML:** Allows you to view the XML in a separate screen.
- **Run Custom Output Mapping:** This brings up the Custom Output Mapping dialogue box used for this result file.
- **Delete:** Deletes the file. A warning message is displayed prior to the file being deleted.

NOTE: *IE 8 may not reveal the real local path to a file. If the file path is displayed a c:\fakepath, you may need to add Insbridge to your trusted sites. Please see Appendix A, Internet Explorer Settings.*

RATING AN INPUT FILE

NOTE: *If you want to rate a file using a mapping, see Rating a File with Custom Mapping.*

To Rate an Input File

1. Navigate to Testing.
2. Select the view where the input file you want to rate is located:
    - **Views/Private:** this tab contains scenarios that are visible to the current user only.
    - **Views/Public:** this tab contains scenarios that are shared by all users for this account.
3. If you want to see a full debug report, check the box in front of **Debug Rate Output**. For a standard report, uncheck this box. If you want to exclude empty results, make sure the checkbox for **Included Empty Results** is unchecked.

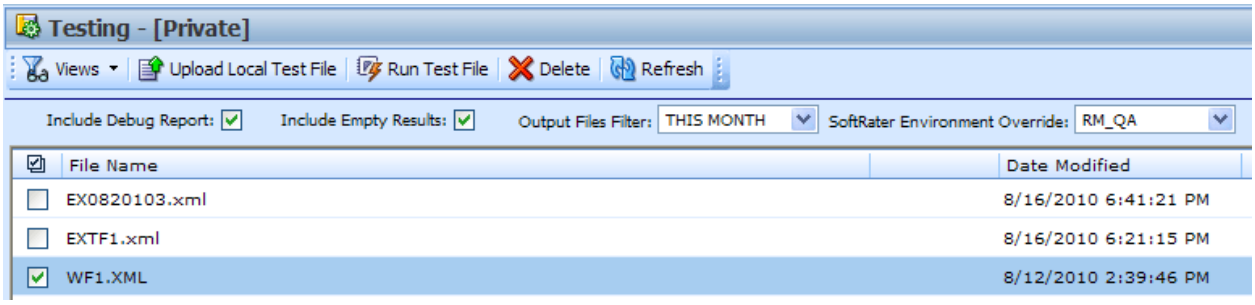


Figure 279 Rating a Test File

4. Click **Run Test File** or double-click the file. The Result file is listed below. Double-click the result file to view the report. For more information, see Viewing the Rating Report.

UPLOAD LOCAL TEST FILES

If the file you want to rate is not in the Input File Listing, you can upload it. You can upload both Insbridge XML and custom XML files that are stored locally.

1. Click Upload a Local Test File. A separate screen is shown.

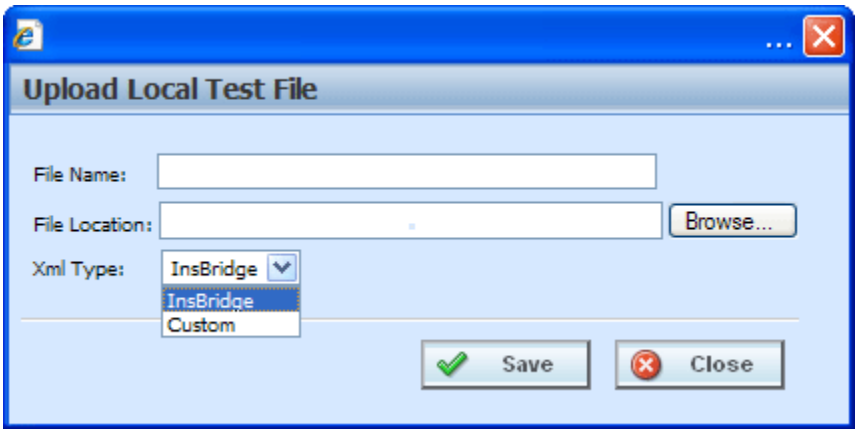


Figure 280 Uploading a Local Test File

2. Enter the **name of the file**.
3. If you know the path to the file you want to rate, type it in the box, otherwise, click Browse… to find a file to rate.
4. Select the type of XML from the drop down menu, either Insbridge or Custom.
5. When finished, click **SAVE**.
6. Your file is saved to the Testing tab. To rate the file, either double-click the file or highlight and click **Run Test File**. Your file will be rated and the result file will show in the result file listing. Double-click the result file to view the report. For more information, see Viewing the Rating Report.

Editing a Test File

You can edit an Insbridge XML file from the Testing tab. Custom XML and MultiLines XML cannot be edited from the testing tab.

1. Select the file you want to edit.
2. Right click and select **EDIT**.
3. The Test Case Editor tab is shown. You can edit your file and save it again. Please see Chapter 24, Test Program for more information.
4. You may need to Refresh the tab to see your saved file.

Copying to another View

Any input file in the Private view can be copied to the Public view and any input file in the Public view can be copied to a Private view. You may want to copy a Public view file to a Private view to test certain changes or copy a Private view file to a Public view to share information with other users.

1. Select the file you want to copy.
2. Right click and select **Copy to [Public or Private] View**.
3. The copy happens immediately.

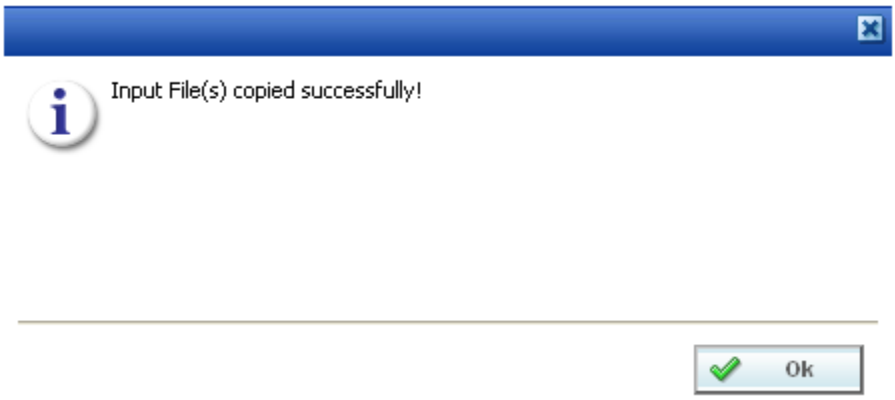


Figure 281 Copying a File to another View

Renaming a File

You can rename your input file at any time.

1. Select the file you want to rename.
2. Right click and select **Rename**. A separate screen is shown.

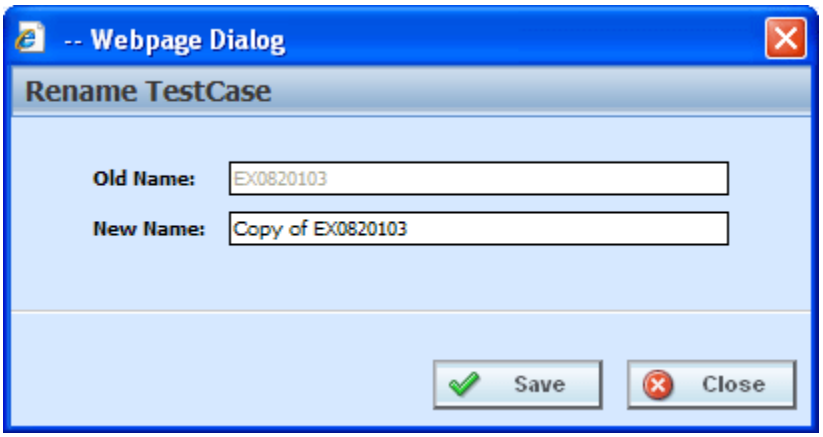


Figure 282 Renaming a Test File

3. Enter in the **New Name**.
4. Click **Save**. Your file will be listed with the new name.

Deleting an Input File

If an input file is no longer needed, it can be deleted. Make sure this is the action you want to take. Deletes cannot be undone.

1. Select the file you want to delete.
2. You can either click **Delete** from the top bar menu or right click and select **Delete**.

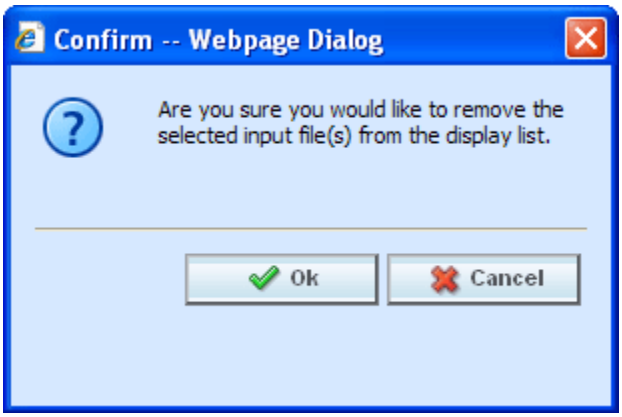


Figure 283 Deleting an Input File

3. A warning message is shown. Click **OK** to remove the file. If this is not the screen you want click Cancel.
4. The file will be removed.

Run Custom Input Mapping

Prior to rating an input file with custom mapping, you can select the custom mapping to use.

1. Select the file that contains custom input mapping.
2. Right click and select **Run Custom Input Mapping**. A separate screen is shown.
3. The subscriber information is filled in.
4. Enter in the **Line**, **Program**, and **Version** numbers.
5. Select the **Type** from the drop down menu. There are three options; Global, Local, and Custom.
6. Select the **Identifier** from the drop down menu. The options may be filled in when you select the File. Otherwise, click Search to obtain a list of custom XML files associated with this file.
7. When finished, click **Transform**.
8. Your file is associated with the custom XML input mapping you selected. The file is ready to be rated.

Figure 284 Running a Custom XML File

NOTE: *The first time you rate a custom XML file, a Custom XML File window is displayed. Enter in the Line, Program, and Version Number. Select the type of custom input file you want to use for mapping and then select the identifier.*

Viewing XML

XML can be viewed for input files. To view the XML prior to rating:

1. Select the file where you want to view the XML.
2. Right click and select **View XML**. The XML is displayed in a separate screen.

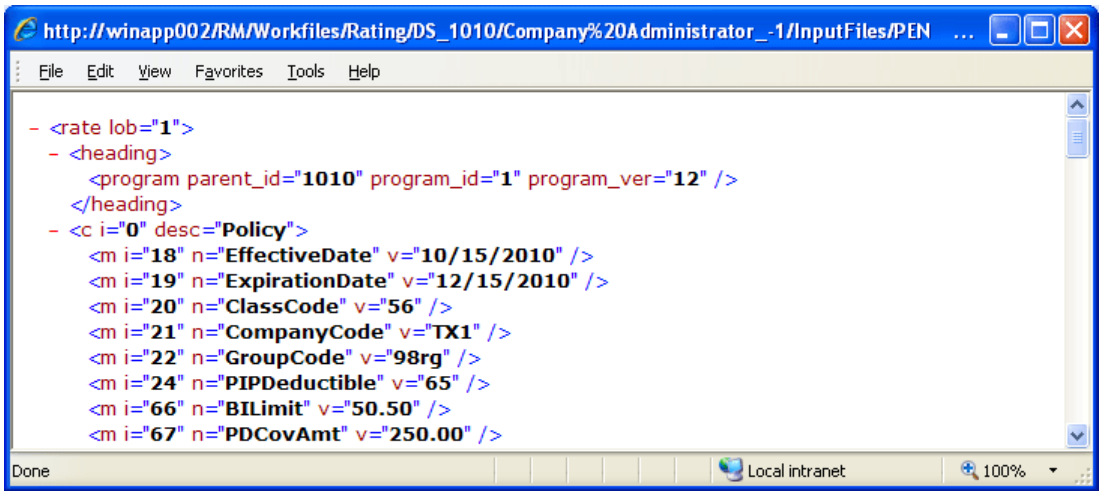


Figure 285 Viewing XML in Testing

RESULT FILES: VIEWING OUTPUT

Result files are listed in the lower portion of the tab. Once an input file has been rated, the result file is placed in the Result File Listing. If the result file you need is not displayed, click Refresh to refresh the screen. There are two options for viewing the results.

- **Actual XML:** shows the actual result XML.
- **Standard Rating Summary Report:** shows the result file with the results in an easy-to-read and understand format. This is the default view.

Actual XML Report

Reports can be viewed in XML format by changing the View on a Standard Rating Report.

Viewing the Actual XML

1. To view the XML, select the result file you want and right click.
2. Click **View XML**. The XML file opens in a separate window.

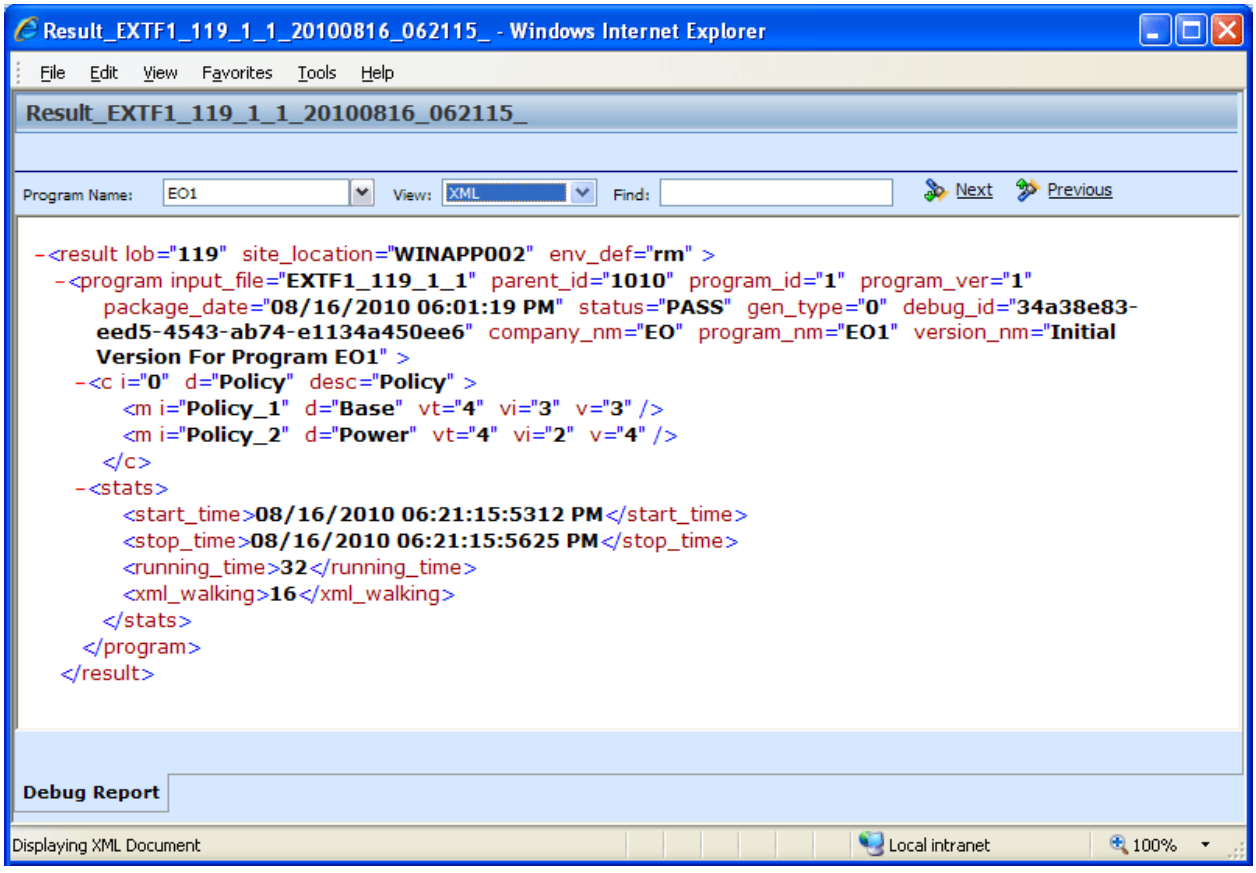


Figure 286 Rating Report, XML View

STANDARD RATING SUMMARY REPORT

The standard Rating Summary report shows information about the result file and the elements (results, variables and inputs) that were selected for output. The report allows you select the program, if there are multiple programs, select the view format and search for specific items.

The Debug tab is visible even if the debug option was not selected.

Viewing the Standard Rating Summary Report

1. To view a Result file, select the file you want and either double-click or right click and select **View Output**.

2. The Rating Report opens in a separate window.

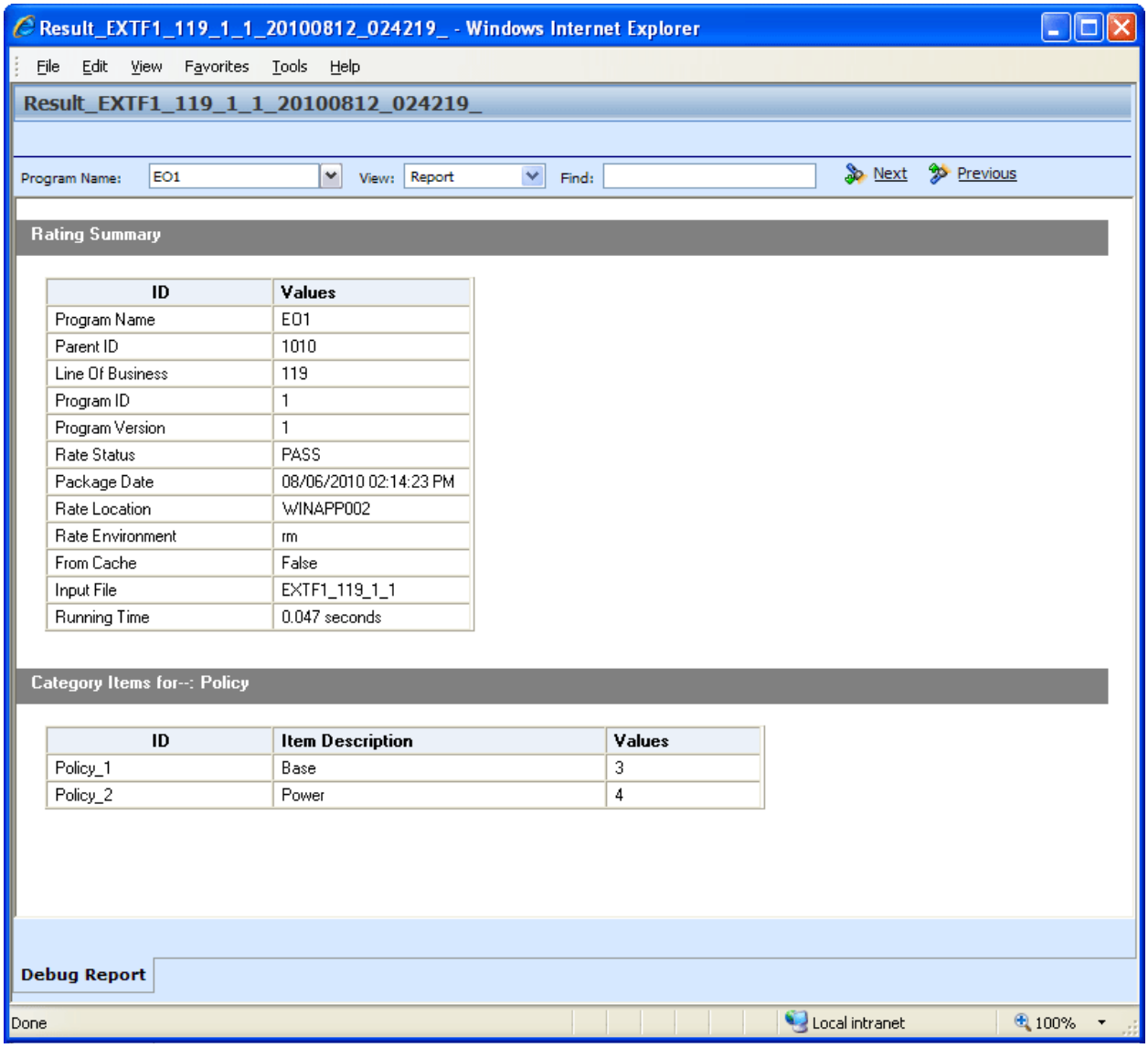
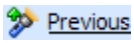


Figure 287 Debug Report without Debug

FUNCTIONALITY

The **Menu Bar** is located at the top of the screen. The menu bar contains the functions you can perform. The menu is the same for reports with debug and for reports without debug.

Functions:

	Program Name: Displays the name of the program being rated. The drop down menu is populated when you are rating multiple programs using Program to Program (P2P) or MultiLines. See MultiLines for more information.
	View: The debug tab automatically shows results in a report view. You may change this view to show the raw XML output.
	Find: Allows you to search through the debug report for a specific alpha/numeric character string.
	Next: If a search is performed, Next will navigate to the next place in the debug report that a match was found.
	**Previous:** If a search is performed, Previous will navigate to the previous place in the debug report that a match was found.

FIELDS

There are two or three fields, depending upon the Debug option selected.

If Debug has been selected:

- The Rating Summary is displayed at the top of the screen.
- The Category Items are listed next.
- The Debug Rating Report is last. This area contains the algorithms, drivers assignments, calculated and table variables used listed in execution order with the details of the actions performed and the results.

If Debug has not been selected:

- The Rating Summary is displayed at the top of the screen.
- The Category Items is listed next.

No algorithms will be listed.

NOTE: *For efficiency purposes, no program to program callout will include empty results.*

Rating Summary

At the top is the Rating Summary. The ID column contains the information about the program. The Vaules column contains the values returned.

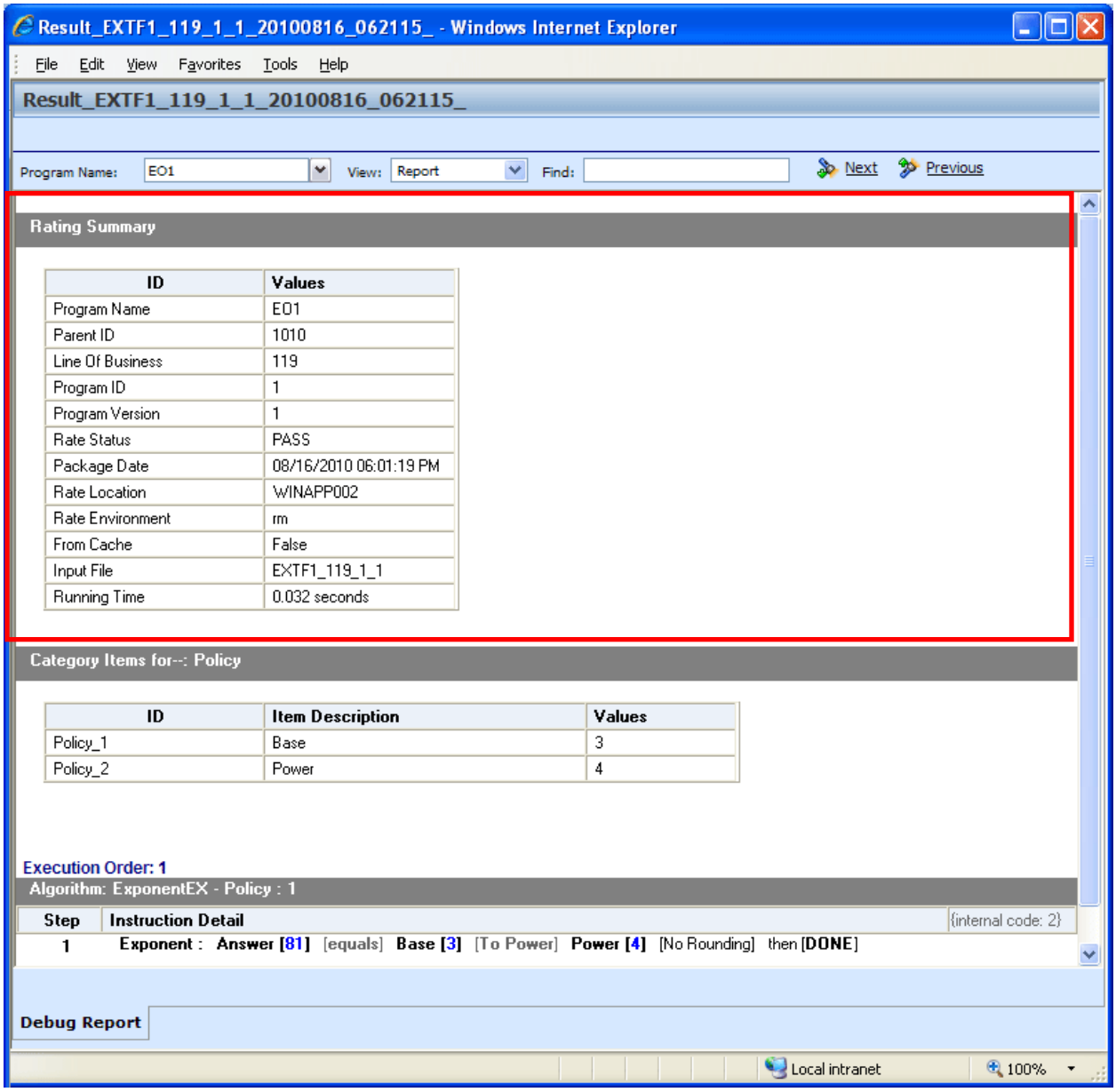


Figure 288 Rating Report with Debug

Fields

Program Name: Name of the program rated. If more than one program was rated, a drop down will be displayed where you can select the report you want to view.

Parent ID: Company ID number.

Line of Business: The Insbridge assigned ID for the line of business the rated package is for.

Program ID: XML ID of the program rated.

Program Version: Version of the program.

Rate Status: The results of the rating request.

- **PASS:** Indicates that all algorithms executed correctly and no Set Underwriting to Fail step was encountered.
- **Stop Requested:** Indicates that a Set Underwriting to Fail step was encountered.

Package Date: Time stamp of when the rated package was created.

Rate Location: Database location for the program.

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

From Cache: True or False.

Input File: Displays the input file that was used in the report.

Category Items

Shows the selected results sorted by category in an easy to read table format. Elements that have the word Premium in the Item Description are bolded for easier reading.

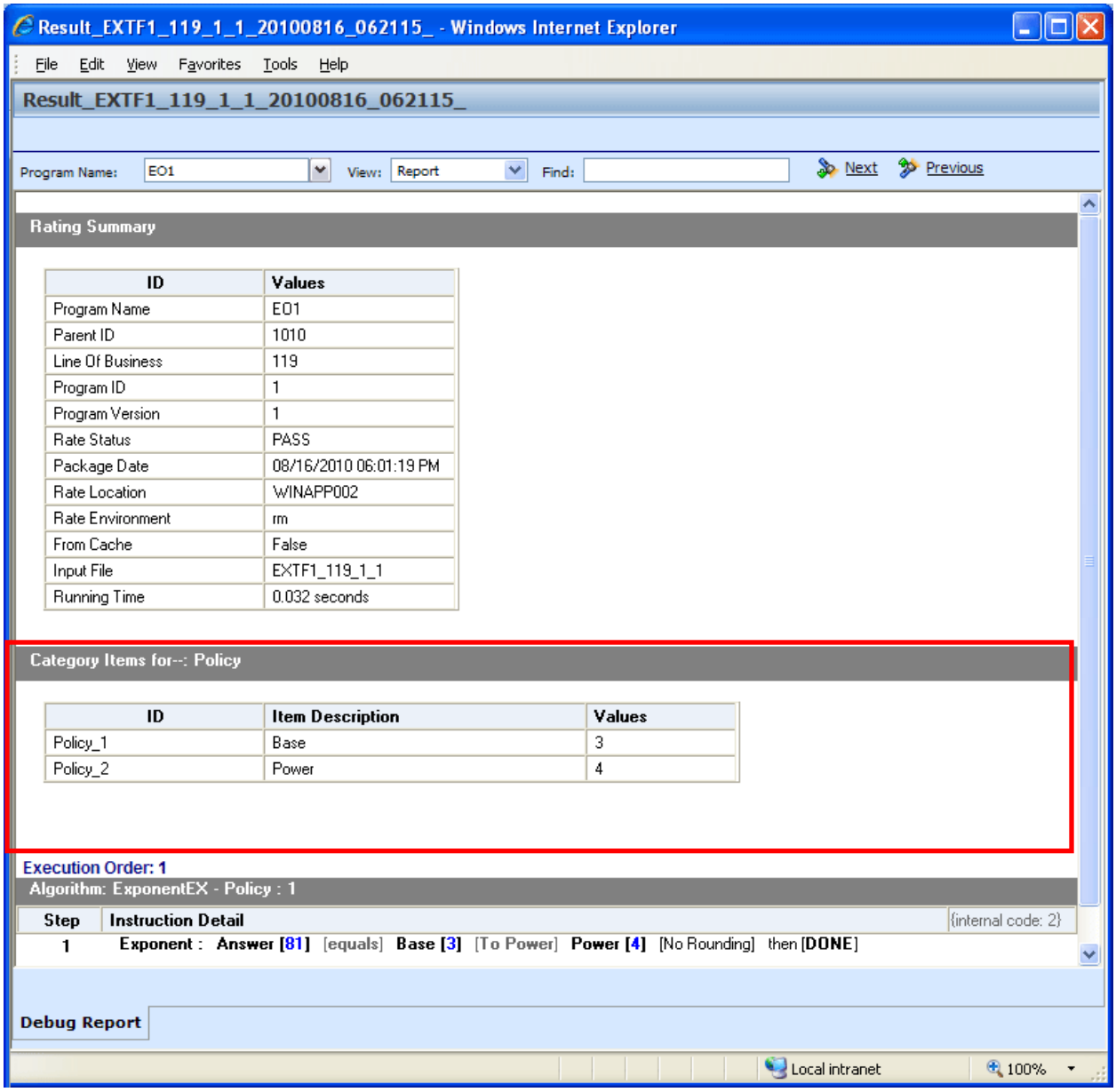


Figure 289 Rating Report with Debug

Fields

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

Debug Rating Report

The Debug Rating report includes detailed information about every algorithm, calculated variable and table variable executed.

Each element will have:

- **Execution Order**: This will be at the top of the field.
- **Element Type**: The gray bar will contain the element type, the working category and the instance. If there is only one instance, the value will not be listed.
- **Name of the Element**: The name of the element.
- **Criteria**: The criteria that was used.
- **Default Value**: If this value is grayed out, the value retrieved will be shown at the end of the row. If the default is red, this indicated that a value was not found and the default was used.
- **Algorithms:** The steps performed by the algorithm.

How a Table Variable is Shown on the Debug Rating Report

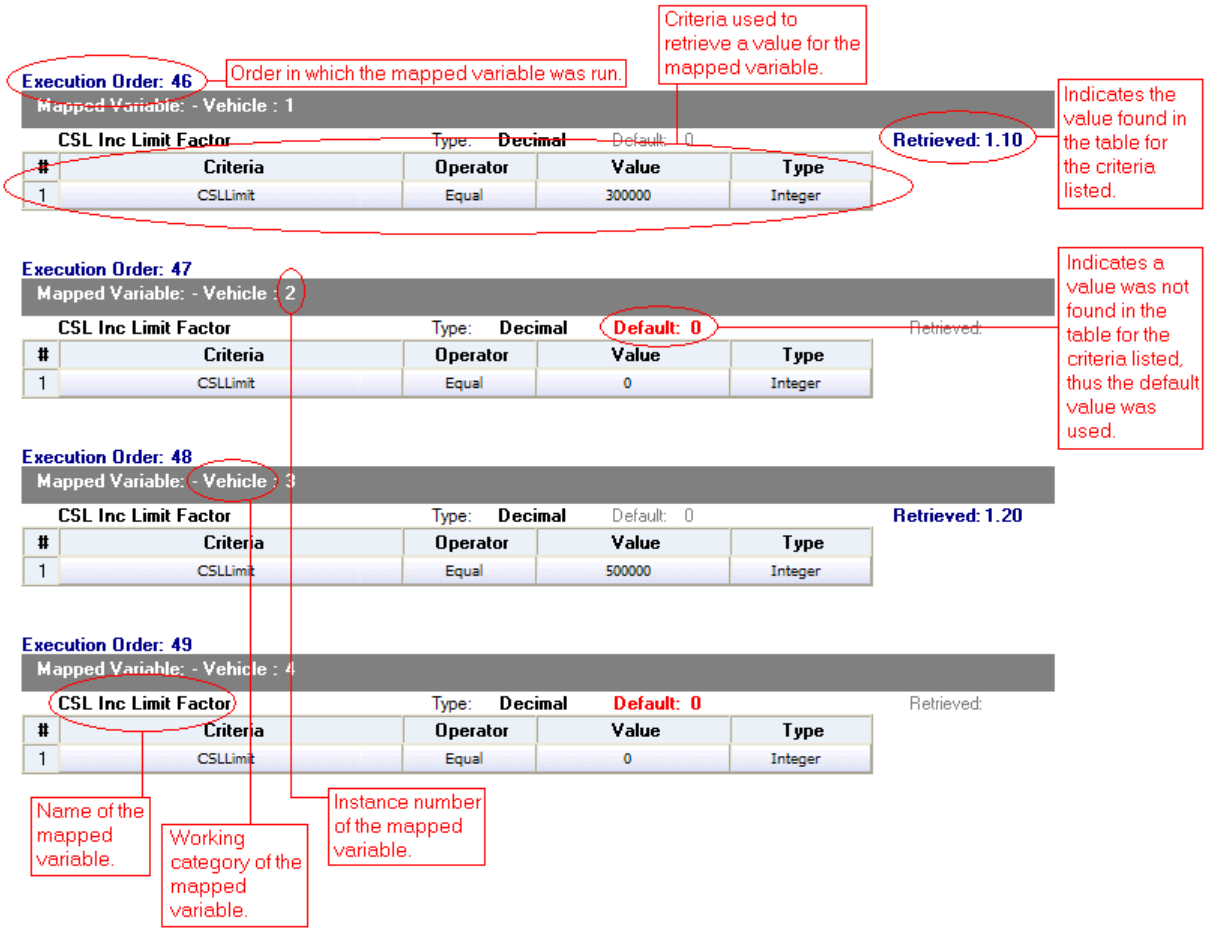


Figure 290 Debug Rating Report with Table Variable Highlighted

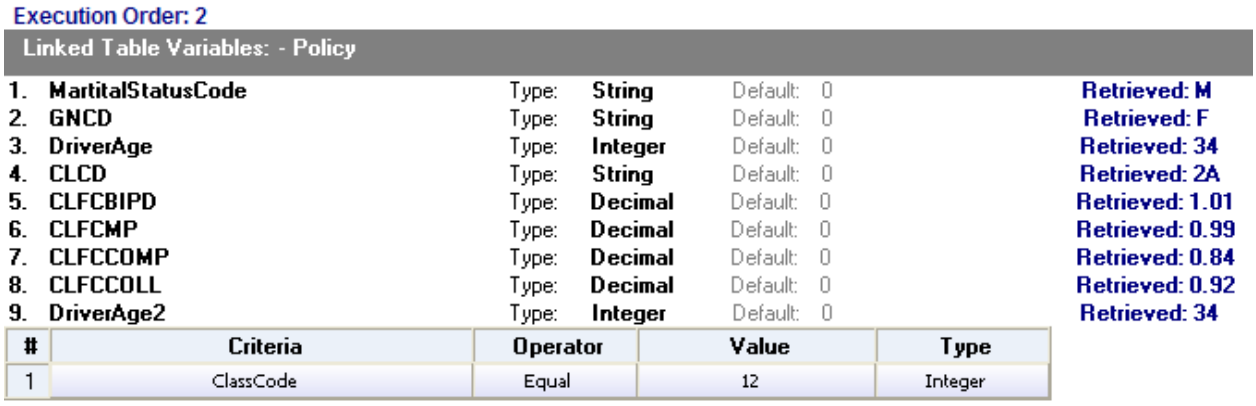


Figure 291 Linked Table Variable in a Debug Report

How an Algorithm/Calculated Variable is shown on the Debug Rating Report

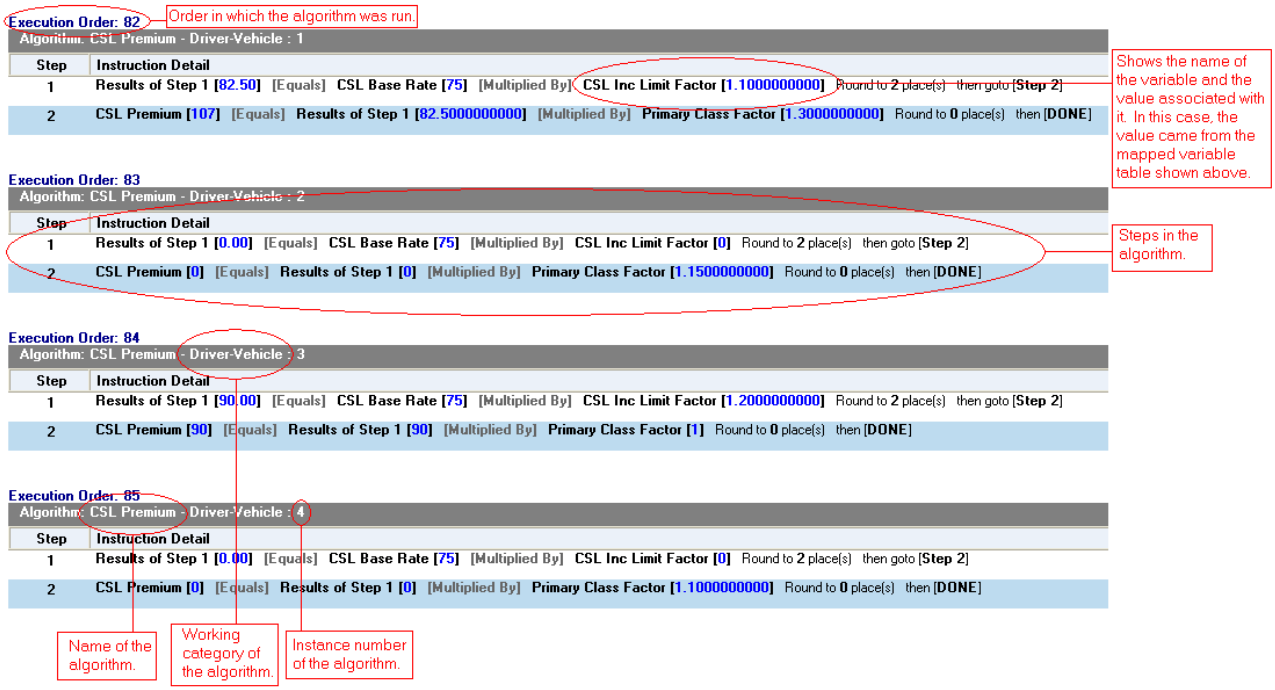


Figure 292 Debug Rating Report with Algorithm/Calculated Variable Highlighted

How an Underwriting Rule is shown on the Debug Rating Report

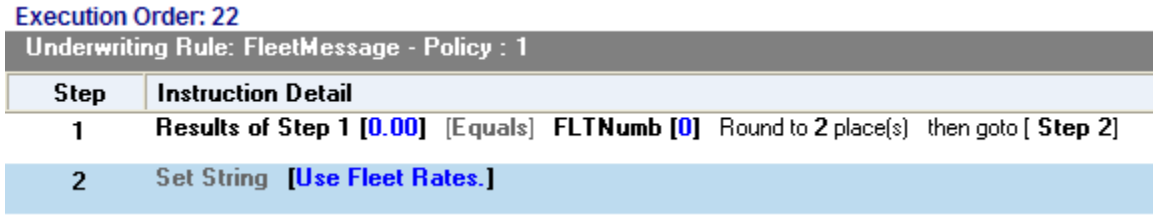


Figure 293 Underwriting Rule in a Debug Report

Run Custom Output Mapping

You can use a custom output mapping file on any result file.

1. Select the result file where you want to use custom output mapping.
2. Right click and select **Run Custom Output Mapping**. A separate screen is shown.
3. The Subscriber, Line, Program and Version cannot be changed.
4. You can select a different **Input File** from the drop down menu.
5. A different **Type** can be selected, if needed. There are three options; Global, Local and Custom.
6. You can select another **Identifier** from the drop down menu. The options may be filled in when you select the File. Otherwise, click Search to obtain a list of custom output mapping files associated with this file
7. Click **Transform**. The changes are applied and a View XML screen will be displayed.

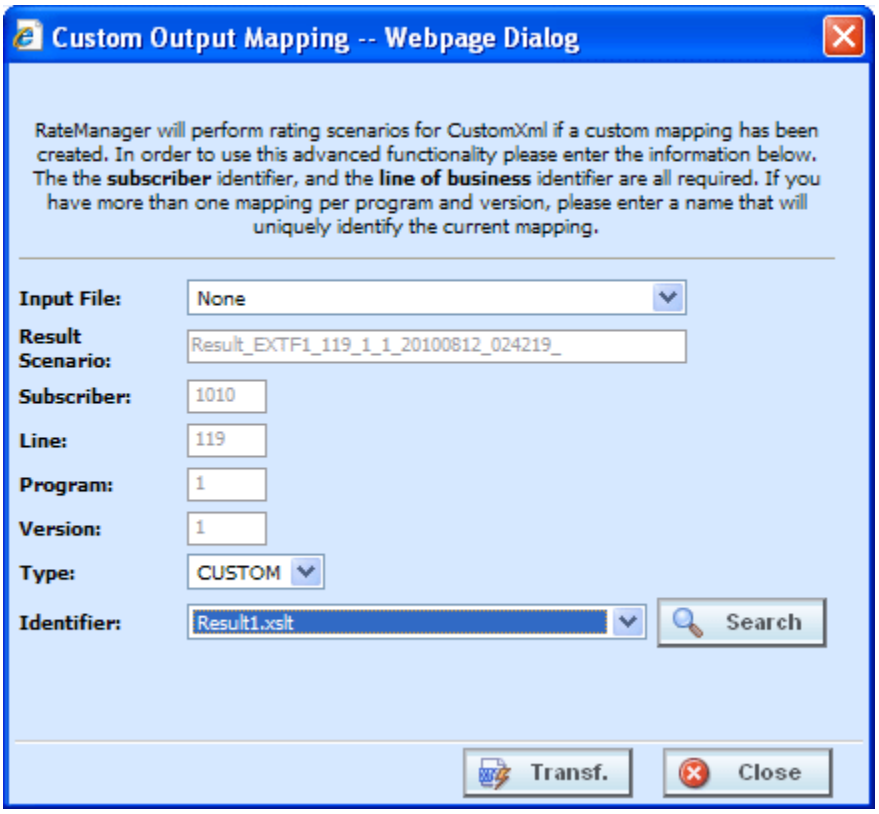


Figure 294 Using Custom Output Mapping

Deleting a Result File

If a result file is no longer needed, it can be deleted. Make sure this is the action you want to take. Deletes cannot be undone.

1. Select the file you want to delete.
2. You can either click **Delete** from the top bar menu or right click and select **Delete**.

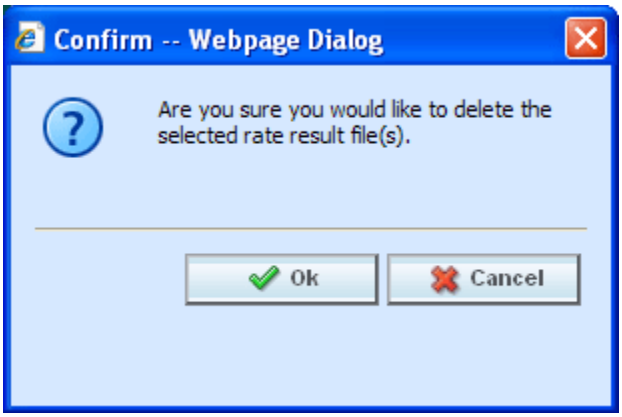


Figure 295 Deleting a Result File

3. A warning message will be displayed. Click **OK** to remove the file. If this is not the screen you want click Cancel.
4. The file will be removed.

REPORT ERRORS

In the event that you have an error, a red banner will be displayed with the reason for the failure listed underneath.

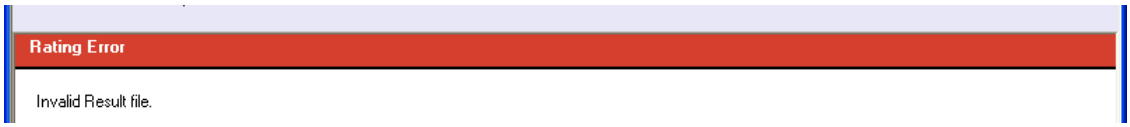


Figure 296 Report Errors

Errors when Rating a File

You might receive an error when they try to rate a file.

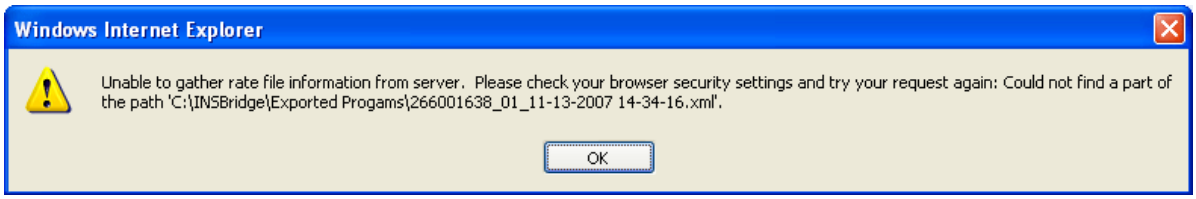


Figure 297 Error Message for Rating a File

There are three possible causes of this error:

1. The file is located on a machine (or a mapped network drive) where the security settings prevent scripting of the ActiveX control that allows Testing to get the file. You either need to adjust your security settings or rate the file from a network share, i.e. \\server\folder\file.xml. For more information, see Internet Explorer Settings and How Security Levels Affect RateManager.

2. You clicked **No** when asked if you wanted to allow the ActiveX control to run. To get prompted again, you must log out of RateManager and log back in.

3. The file does not exist at the location specified. Check to be sure the file actually exists.

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

IMPACT ANALYSIS

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

Impact Analysis contains two *sub-tabs*:

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

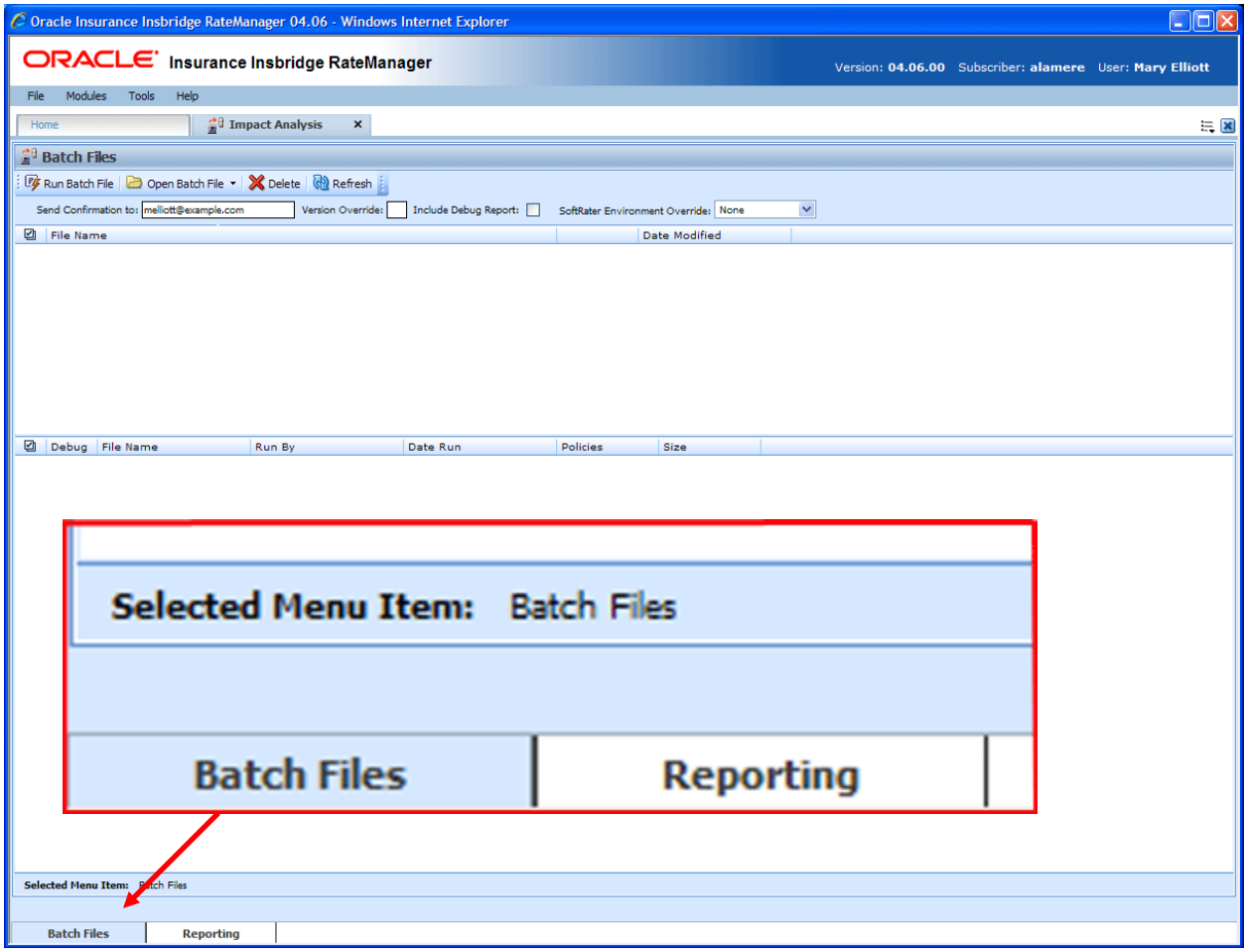


Figure 298 Impact Analysis Tab

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

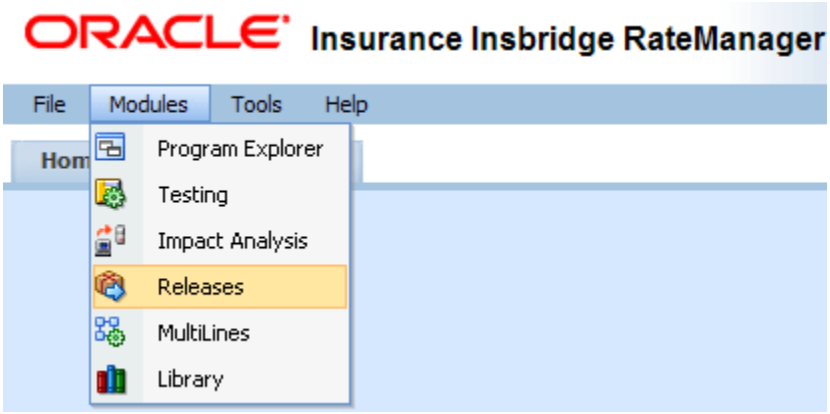
PREPARATION

Batch files are required when working with Impact Analysis.

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

Batch Packaging Location

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



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

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

Preparing a Batch Input File

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

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

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

Batch Input Files

There are two types of batch input files:

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

Individual File

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

An example single batch XML input file is shown in Figure 282, (<ibdoc> is used as the XML wrapper):

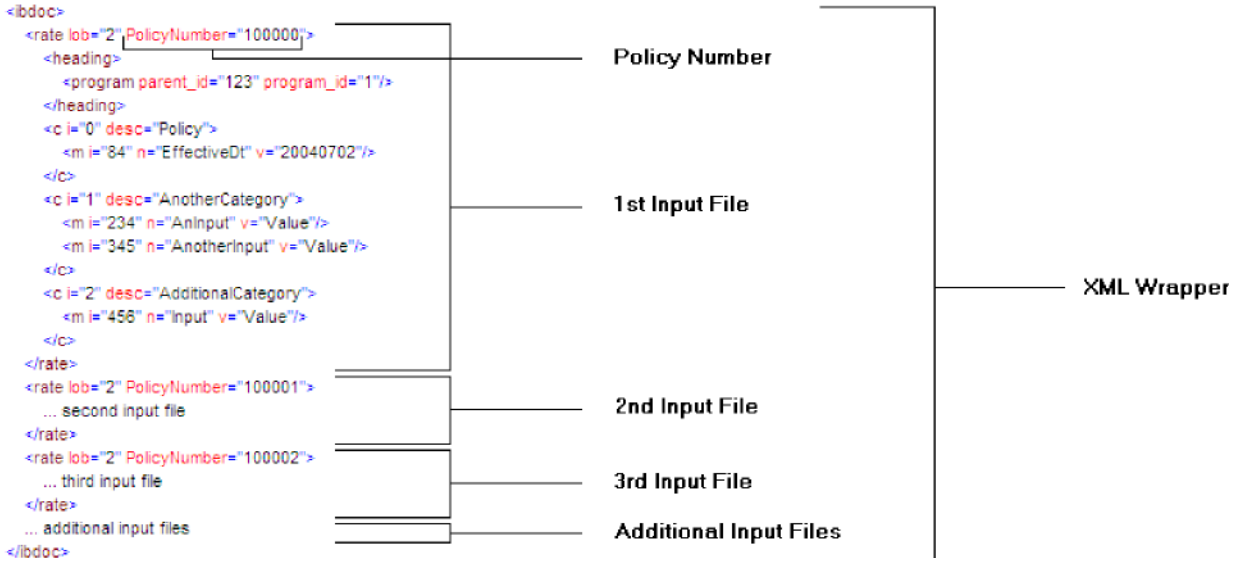


Figure 299 Example of a Batch XML File

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

Group Folders

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

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

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

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

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

Result Mapping in Batch Files

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

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

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

Batch Results with New Line

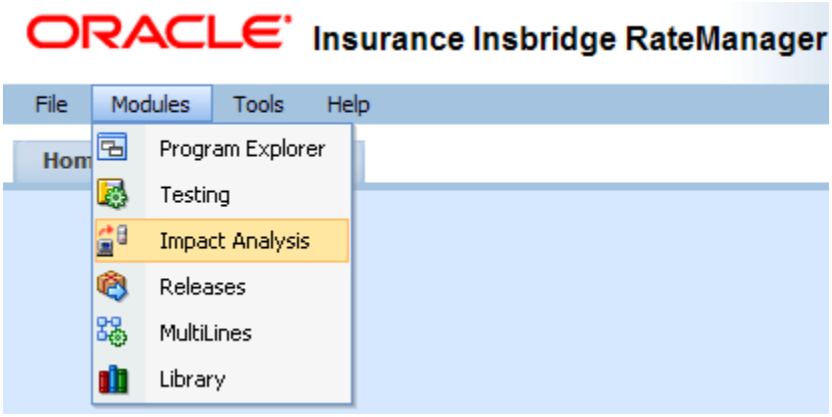
In Batch Files, the results are set to form one continuous string. If you want to add a break between results, you must go to RateManager.

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

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

To Navigate to Impact Analysis

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



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

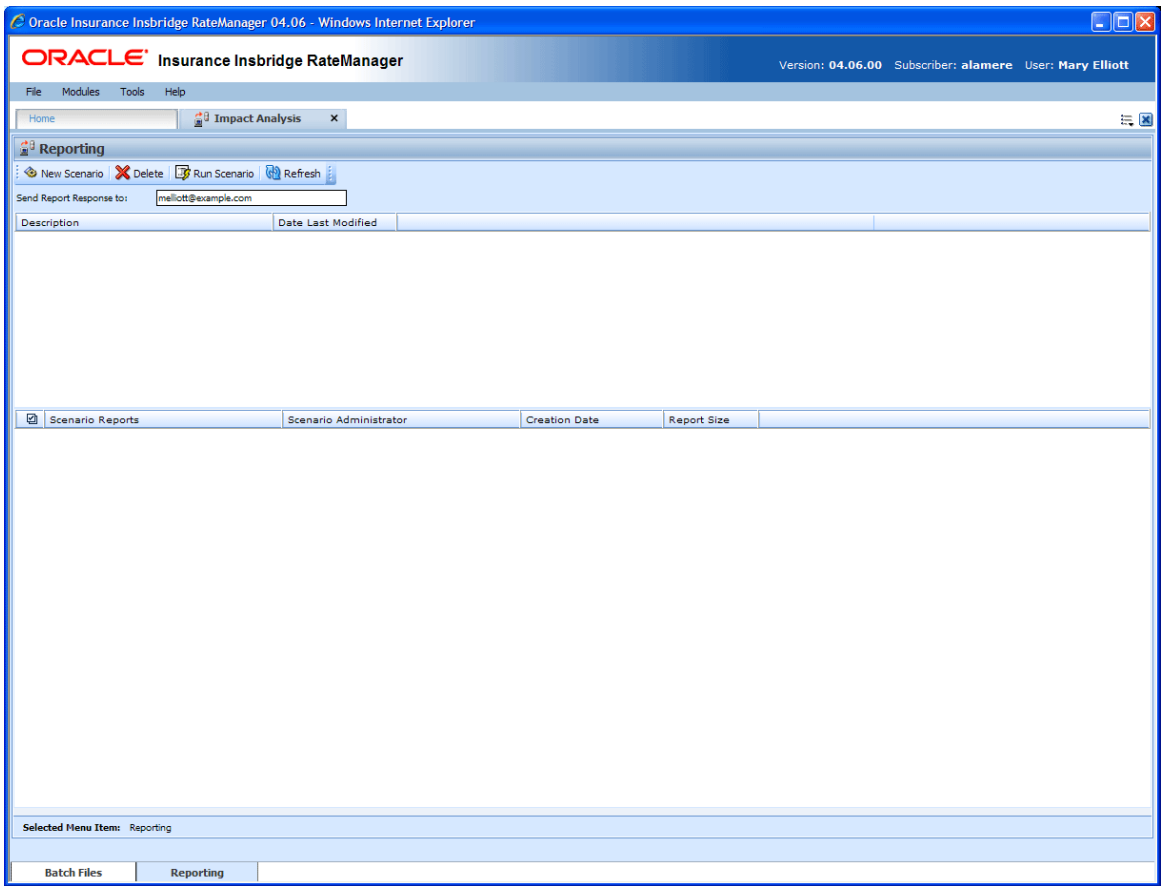


Figure 300 Impact Analysis Batch File

BATCH FILES

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

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

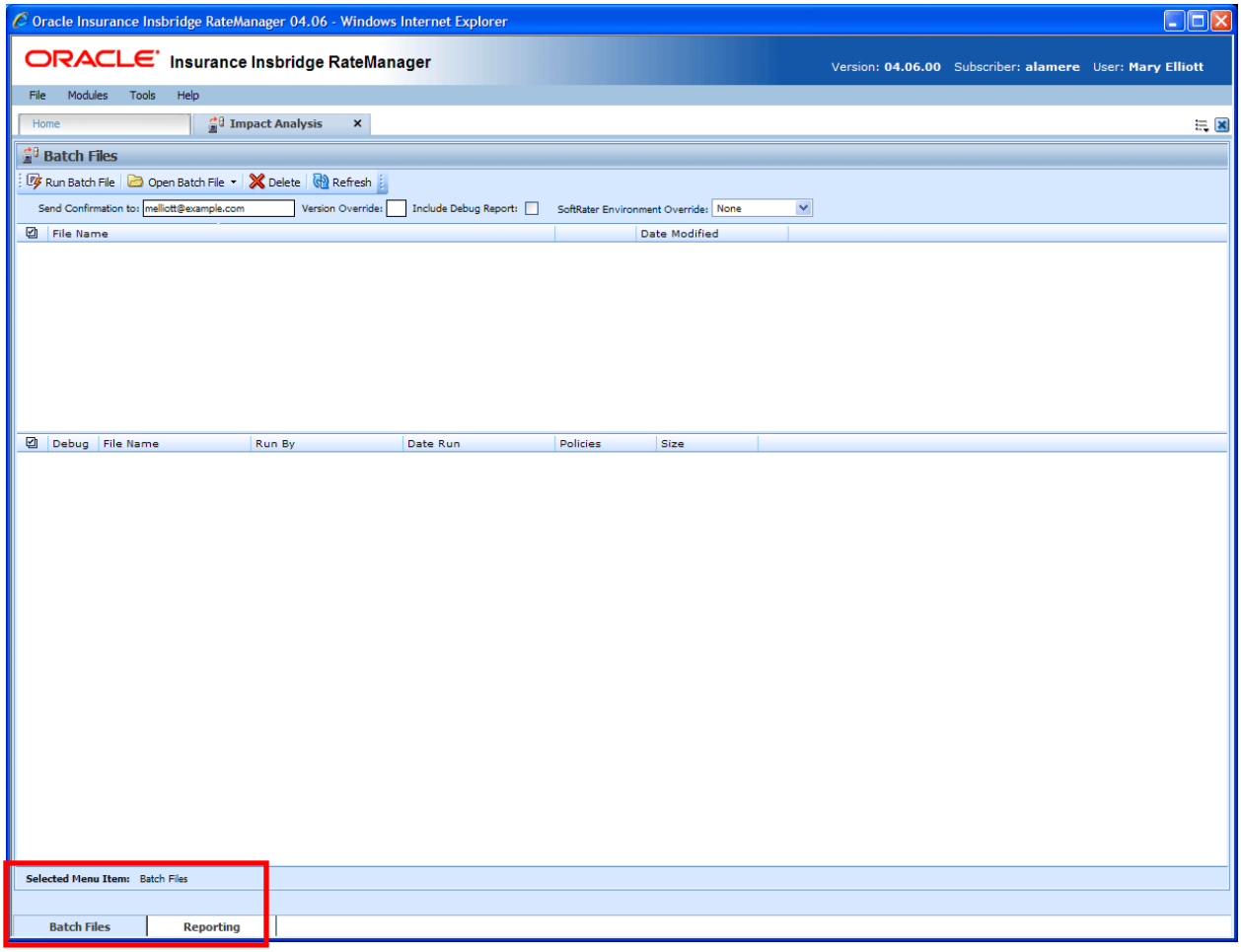
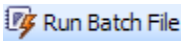
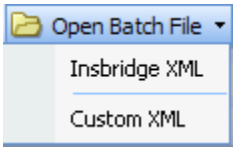
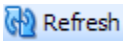


Figure 301 Batch Files Sub-Tab

FUNCTIONALITY

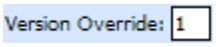
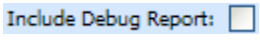
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

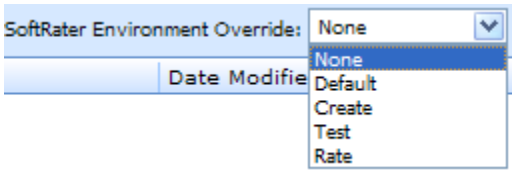
Functions:

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

Definition Options:

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

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

	**SoftRater Environment Override:** Choose this option if you want to override the rating environment. • **None**: no override will be in place. You also can use this option when you want to use the defined environment in your ratings. • **Default**: selects the default environment. • **Another Environment**: if other environments have been entered, you may select one of those. **NOTE:** *If you select Default or another environment, any defined environments in your ratings will be ignored*.

FIELDS

The fields on the tab are divided over two areas:

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

XML Input File Listing

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

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

File Name: Displays the pathway of the input file.

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

Result File Listing

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

Check Box: Used to select multiple files to delete.

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

File Name: The name of the result file.

Run By: The user that rated the file.

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

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

Size: The size of the result file.

Right Click Options

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

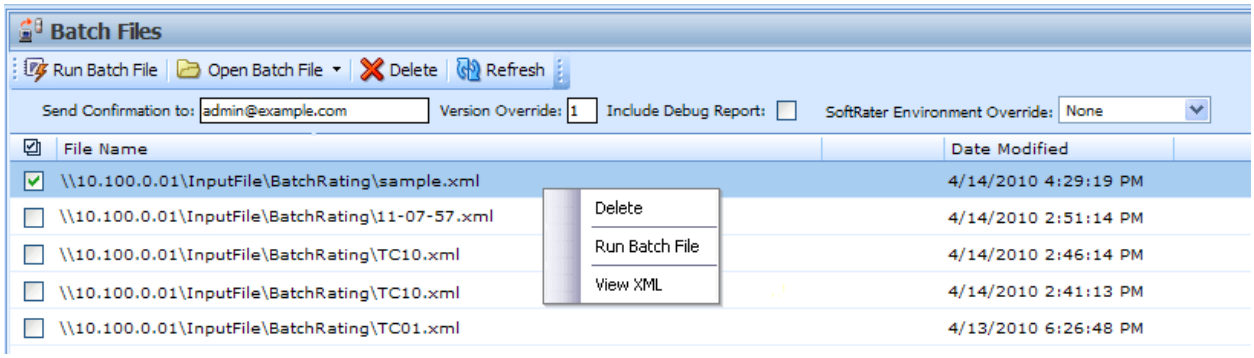


Figure 302 Right Click Menu for the XML Input File Listing

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

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

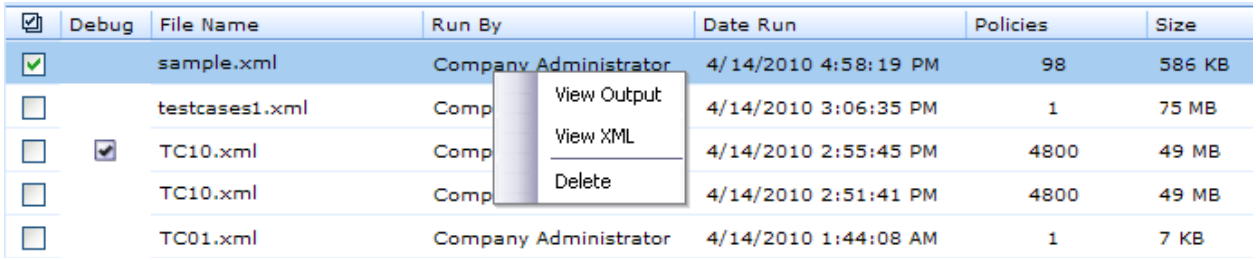


Figure 303 Right Click Menu for Result File Listing

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

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

Rating an Insbridge XML Batch File

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

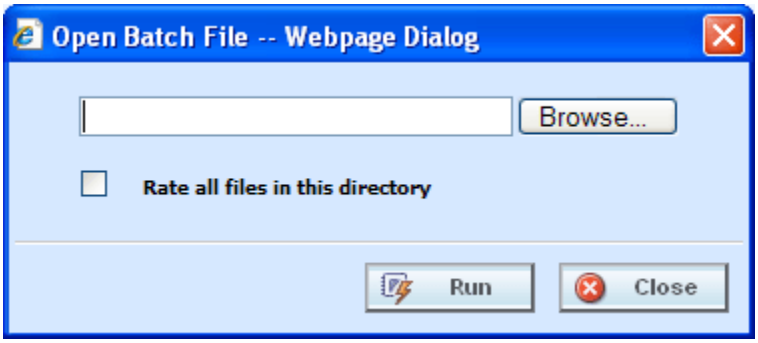


Figure 304 Entering a Batch File Name

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

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

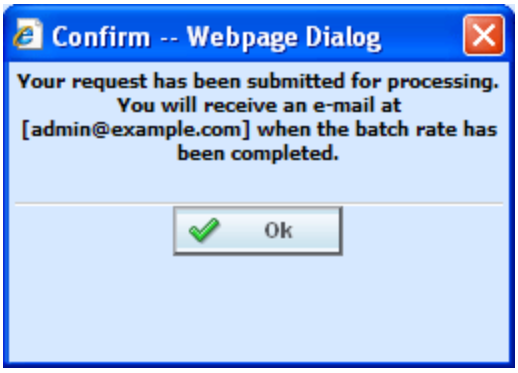


Figure 305 Confirmation Message for Batch Rate Request

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

Rating a Custom XML Batch File

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

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

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

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

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

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

6. If the file to be rated in not listed, click **Open Batch File** and select **Custom XML**. A browse box opens and you can select the file to rate.

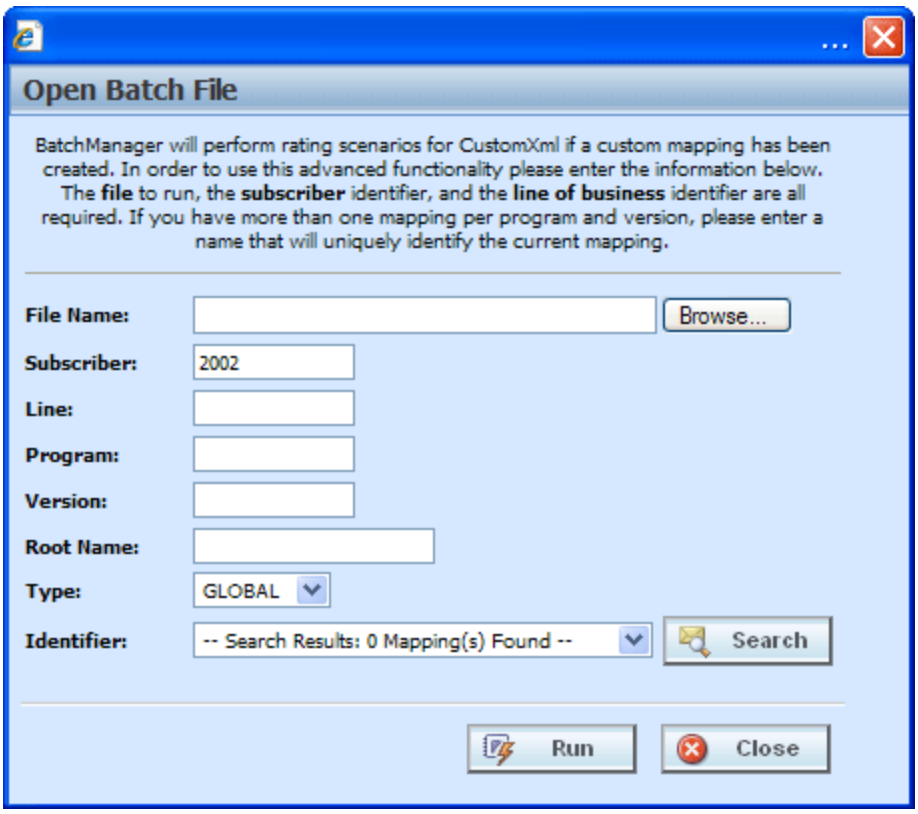


Figure 306 New Rate Custom Batch File Dialogue Box

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

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

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

9. Enter in the **Root Name**. This is the element name that delineates each quote. Do not include the element brackets. If no entry is made, no files will be returned. In Figure 290, **Quote** is the element that marks the beginning and end of each quote.

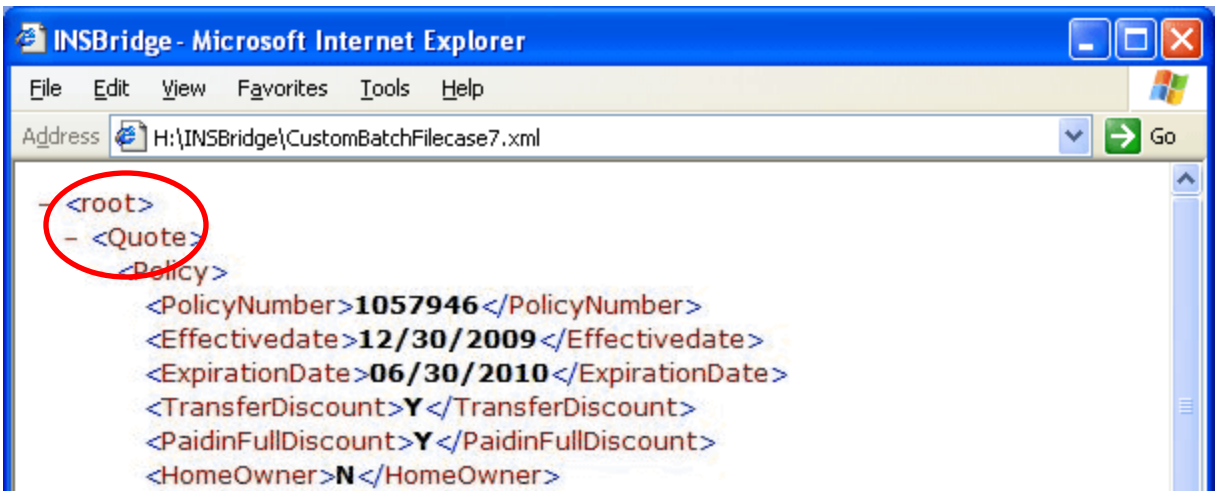


Figure 307 Example Custom Batch File

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

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

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

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

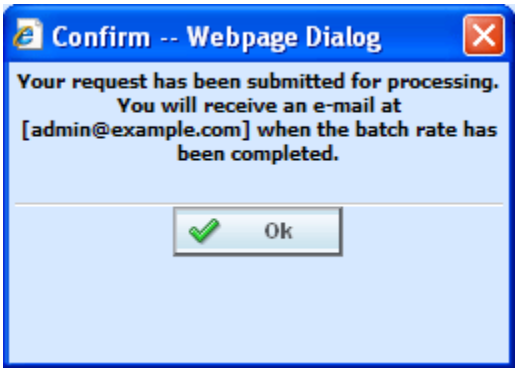


Figure 308 Confirmation Message for Batch Rate Request

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

Re-Running a Custom Batch File

You can rerun a custom batch file without changing the mapping information by using the right click menu or double clicking the custom XML file. This will cause the file to run again without presenting the mapping options.

1. Select the custom XML file you want to rerun and right click.
2. Select **Run Batch File**. This will run the batch file. The Custom XML File window where you can select mappings will not be presented.
3. Results will be displayed below.

Using the right click menu may save some time if you do not have any changes to the mapping file. This option can be used after the first initial run.

You also can double click the file to immediately rerun the batch file.

NOTE: *If you want to change the mapping information, you must click the **Run Batch File** option in the top bar menu.*

Deleting a Batch File

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

To Delete an Input File

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

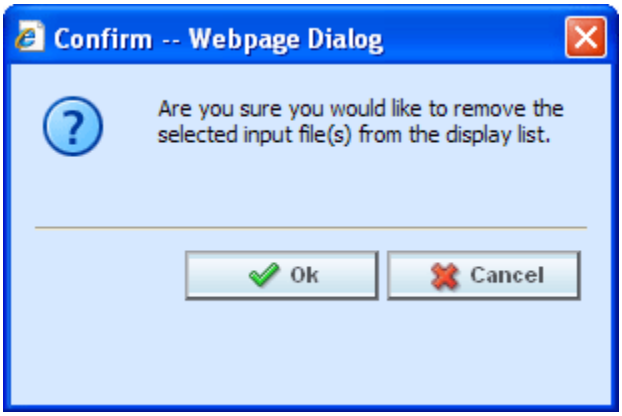


Figure 309 Delete Input File Message

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

Batch Error Messages

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

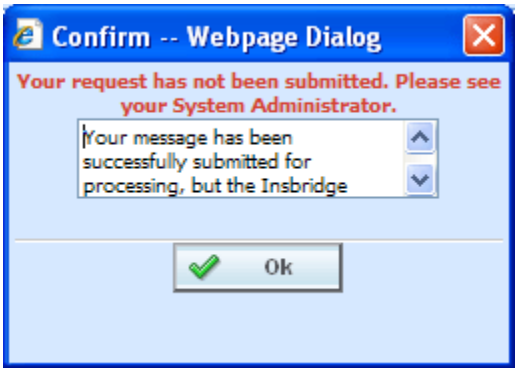


Figure 310 Error Message for Batch Rate

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

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

REPORTING

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

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

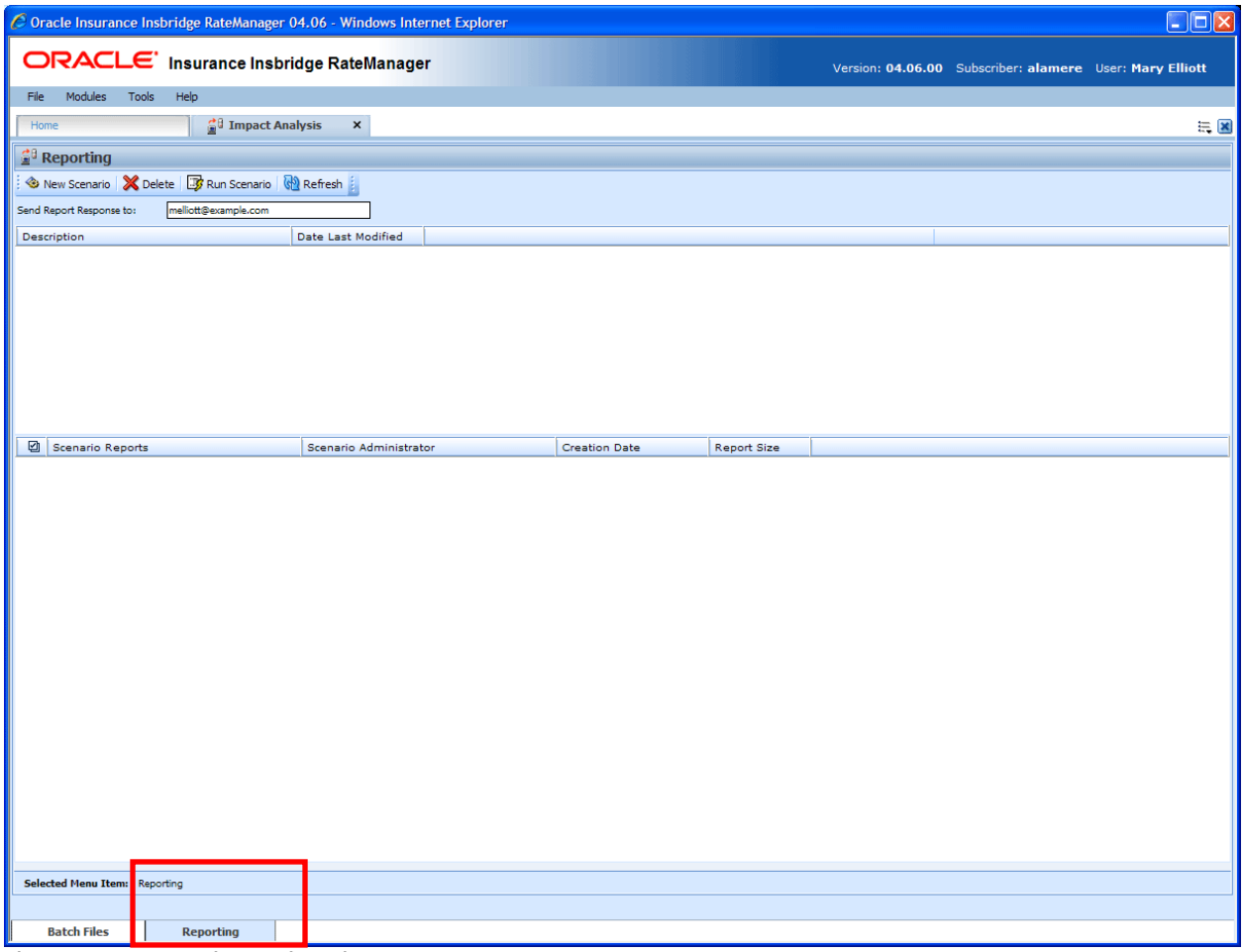
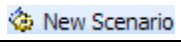
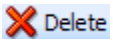
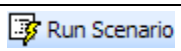
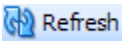


Figure 311 Reporting Sub-Tab

FUNCTIONALITY

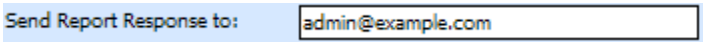
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

Functions:

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

Definition Options:

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

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

FIELDS

The fields on the tab are divided over areas:

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

Scenario Listing

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

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

Scenario Reports Listing

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

Check Box: Used to select multiple reports to delete.

Scenario Reports: Name of the report.

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

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

Report Size: Size of the report.

Right Click Options

There are no right click menu options for Reporting.

NEW SCENARIO

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

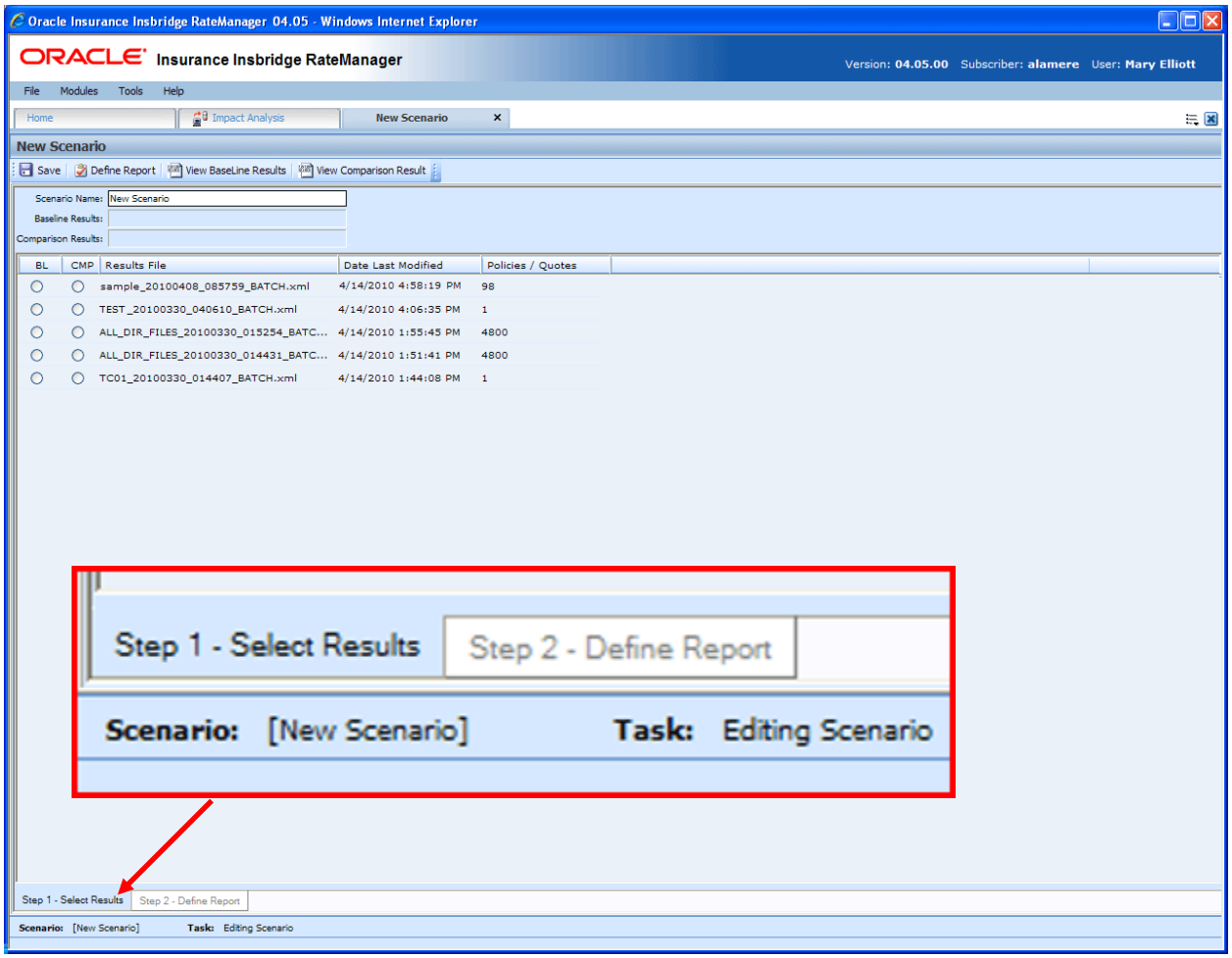


Figure 312 Creating a New Scenario

The New Scenario tab also has two sub-tabs:

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

STEP 1: SELECT RESULTS

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

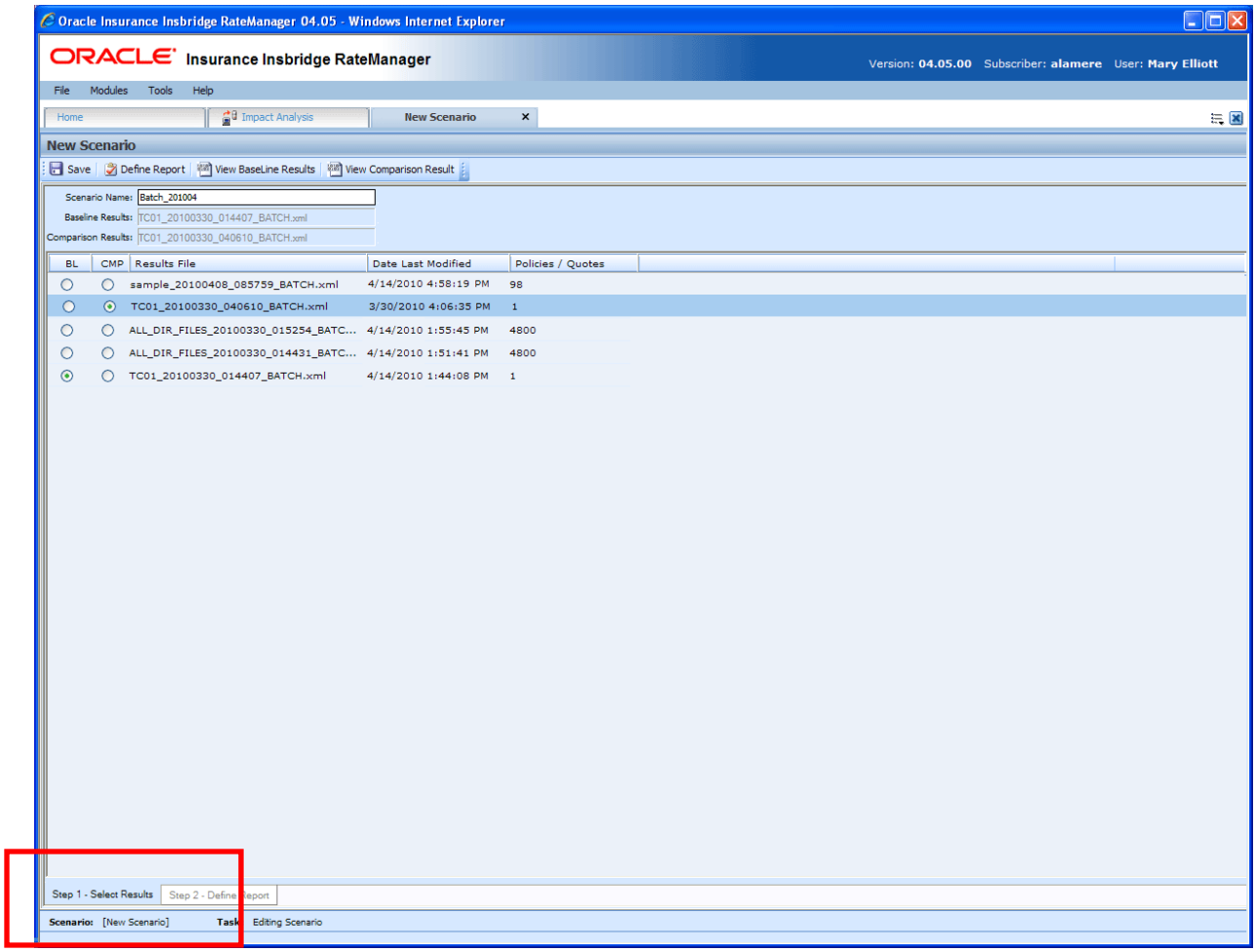
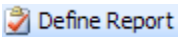
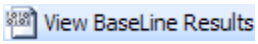
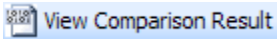


Figure 313 Step 1: Select Results

FUNCTIONALITY

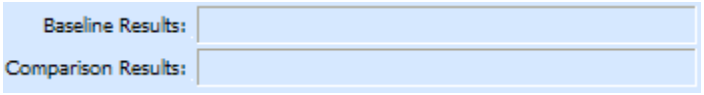
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

Functions:

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

Definition Options:

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

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

FIELDS

Results File Listing

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

If the file has Debug checked it will not be listed.

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

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

Results File: Name of the results file.

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

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

Right Click Options

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

File Names

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

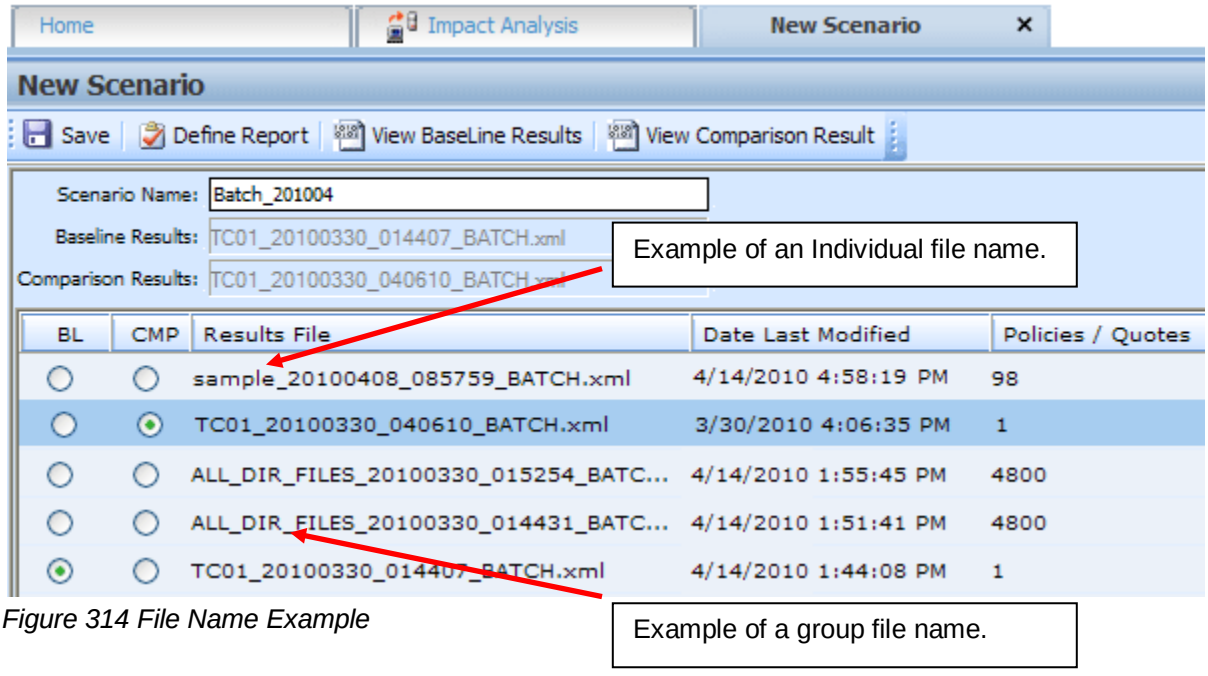


Figure 314 File Name Example

STEP 2: DEFINE REPORT

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

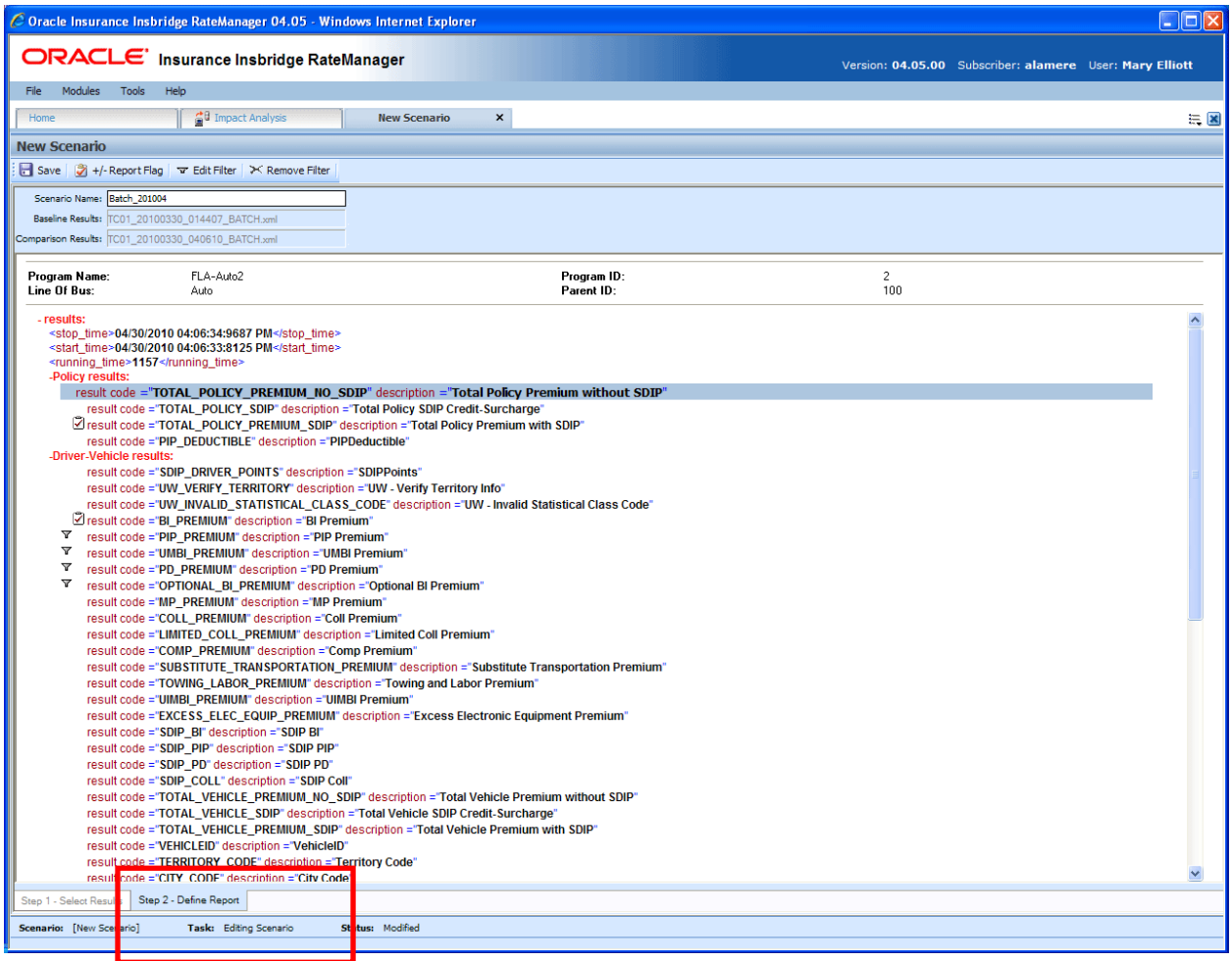
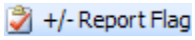
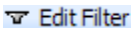
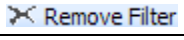


Figure 315 Step 2: Define Report

FUNCTIONALITY

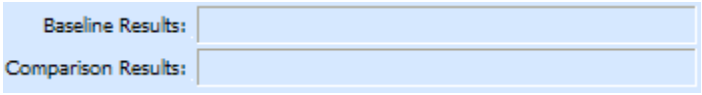
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this tab as well as the definition options you can add.

Functions:

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

Definition Options:

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

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

FIELDS

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

Program Information

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

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

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

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

Results

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

Right Click Options:

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

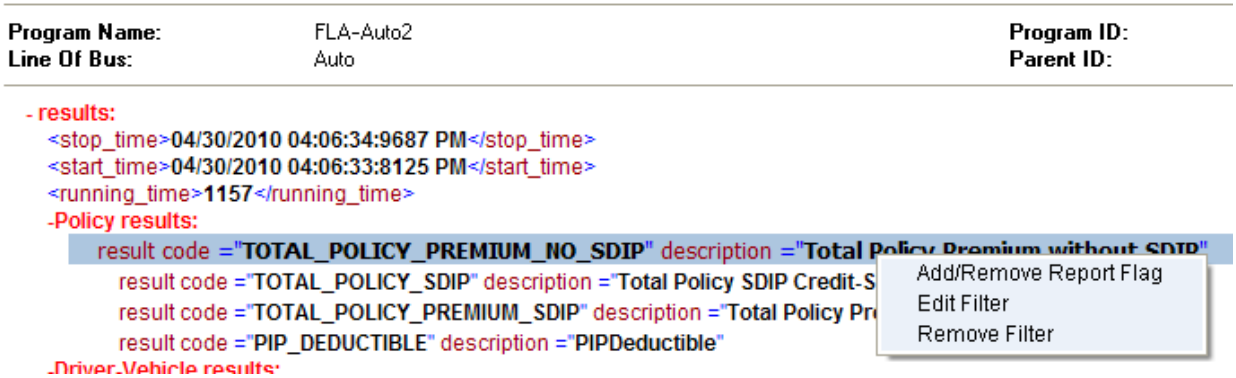


Figure 316 Right Click menu for Step 2: Define Report

Step 2: Define Report will have three choices:

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

Report Flags

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

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

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

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

To Flag or Un-flag a Result

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

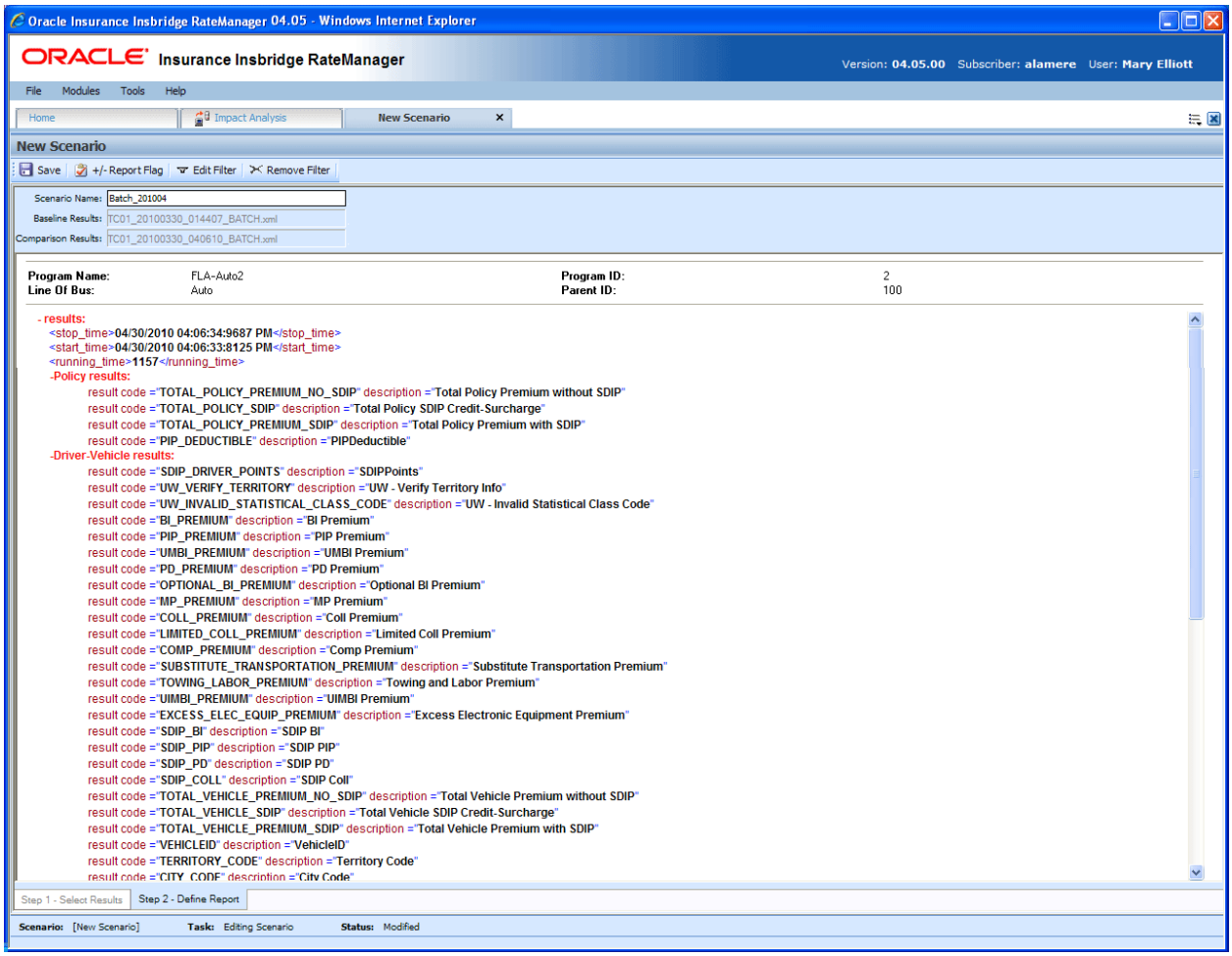


Figure 317 Flagging or Un-Flagging a Result

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

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

Report Filters

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

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

To Add/Edit a Filter

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

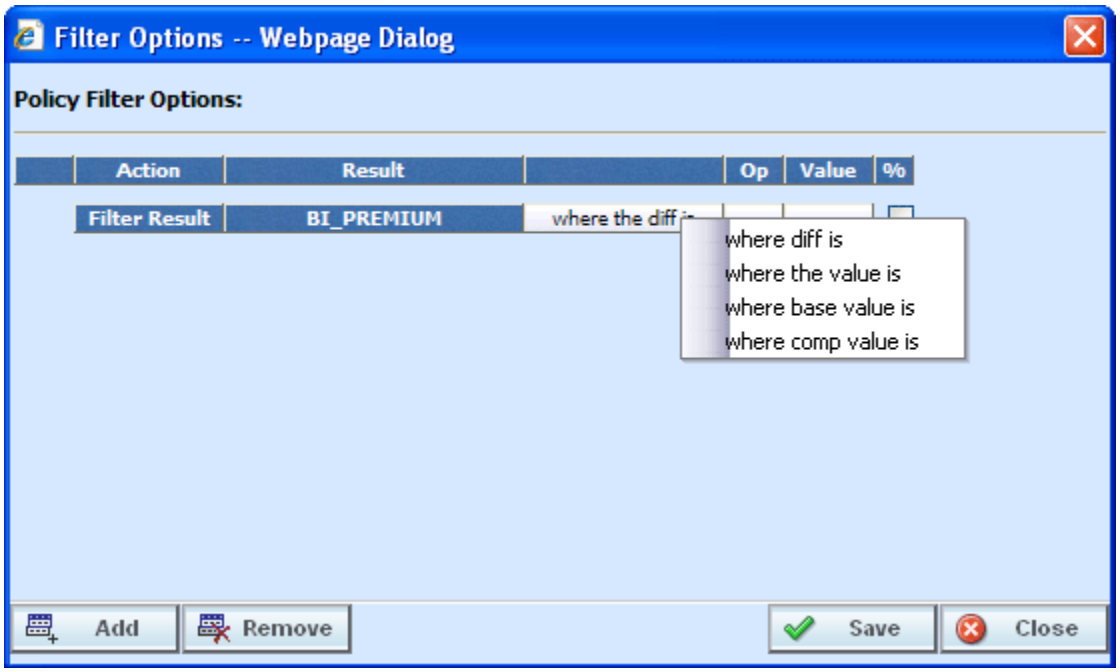


Figure 318 Policy Filter Options

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

There are four types of filters:

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

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

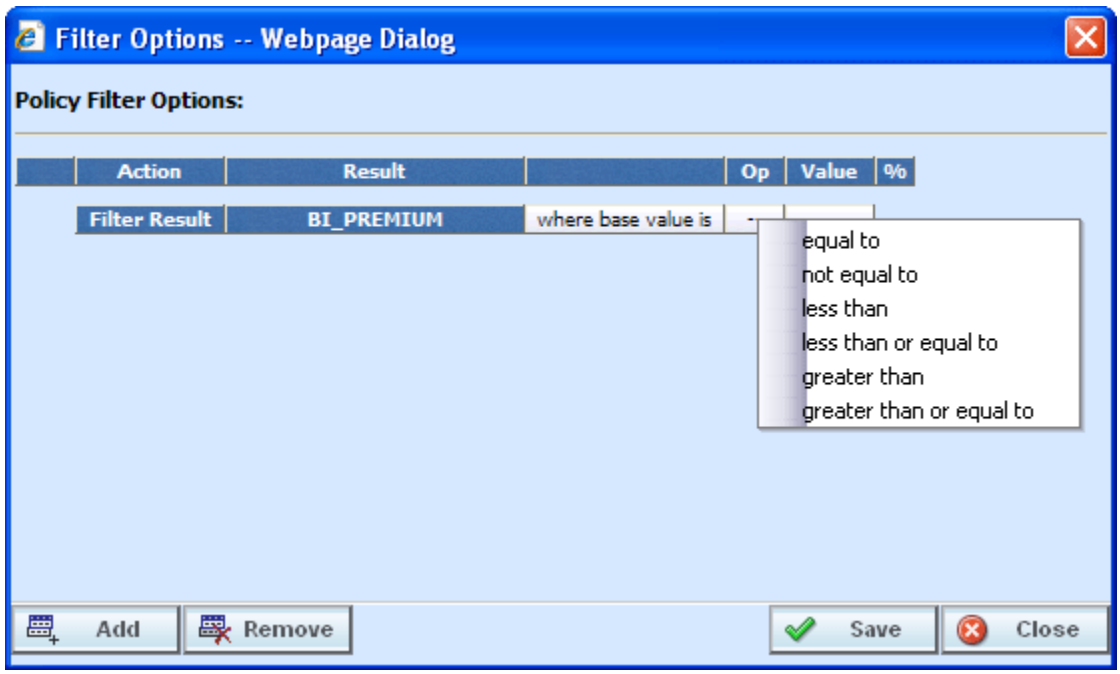


Figure 319 Filter Options Selecting an Operator

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

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

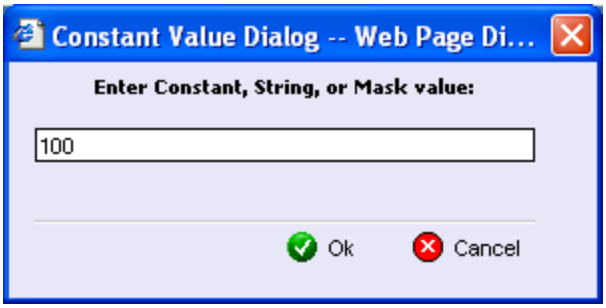


Figure 320 Entering a Constant Value

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

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

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

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

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

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

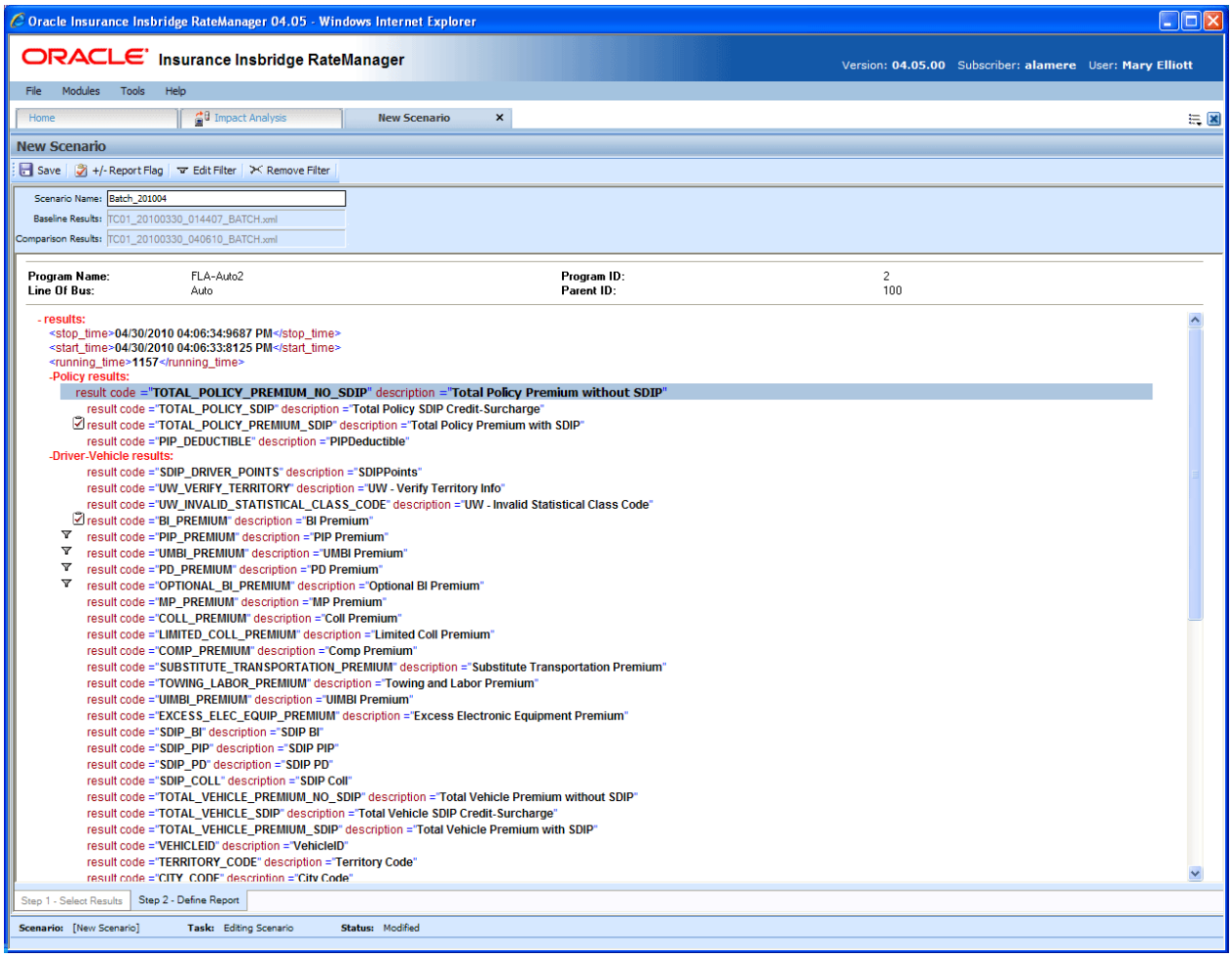


Figure 321 Step 2: Define Report with Flags and Filters

CREATING A NEW SCENARIO REPORT

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

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

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

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

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

4. **Save** your report.

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

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

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

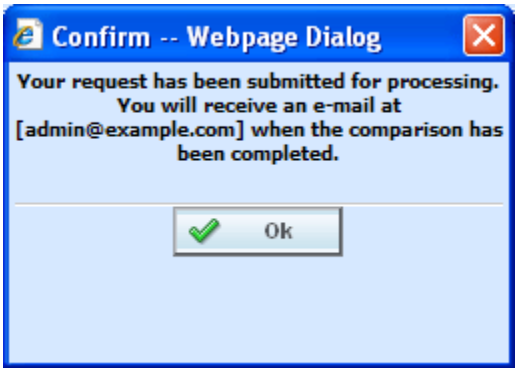


Figure 322 Confirmation Message for Running an Impact Analysis Scenario

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

Batch Error Messages

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

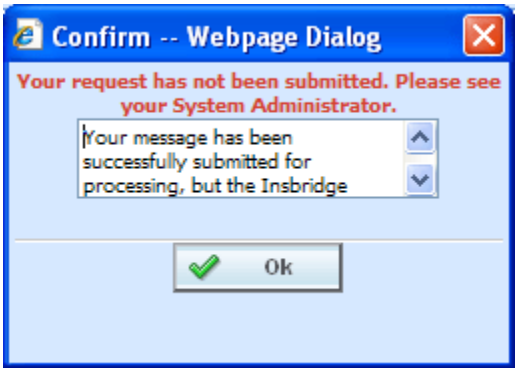


Figure 323 Error Message for Batch Rate

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

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

EDITING A SCENARIO REPORT

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

To Edit a Scenario

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

DELETING A SCENARIO

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

To Delete a Scenario Report

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

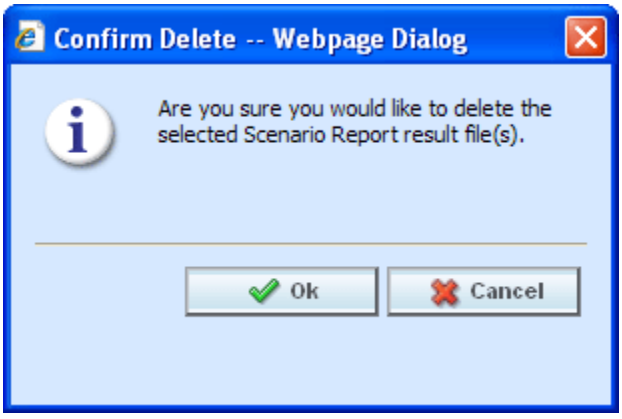


Figure 324 Delete Report Message

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

REPORTS

Impact Analysis has a variety of reports:

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

Viewing a View XML Report

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

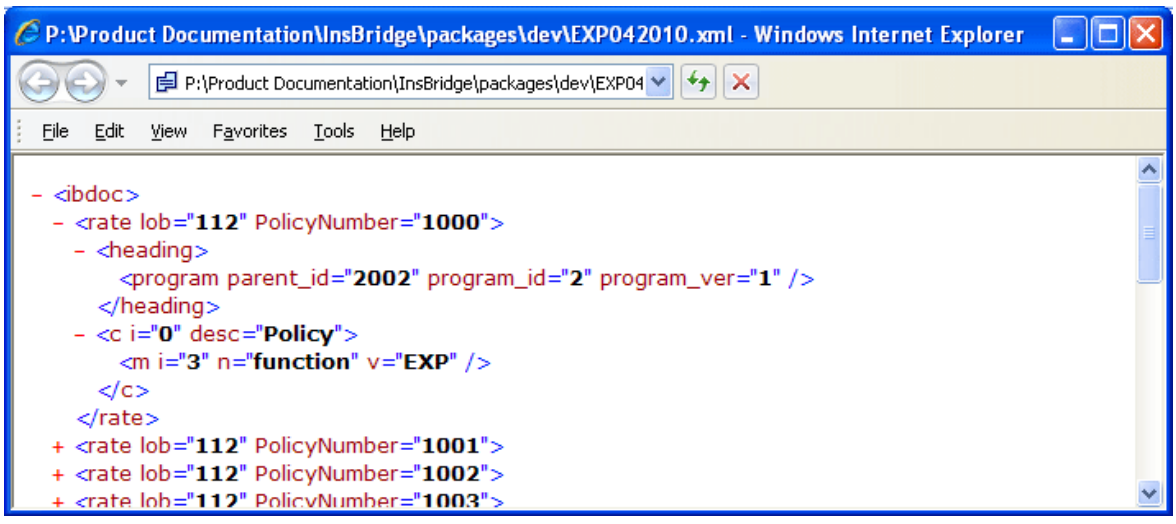


Figure 325 View XML Report

Viewing a View Output Report

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

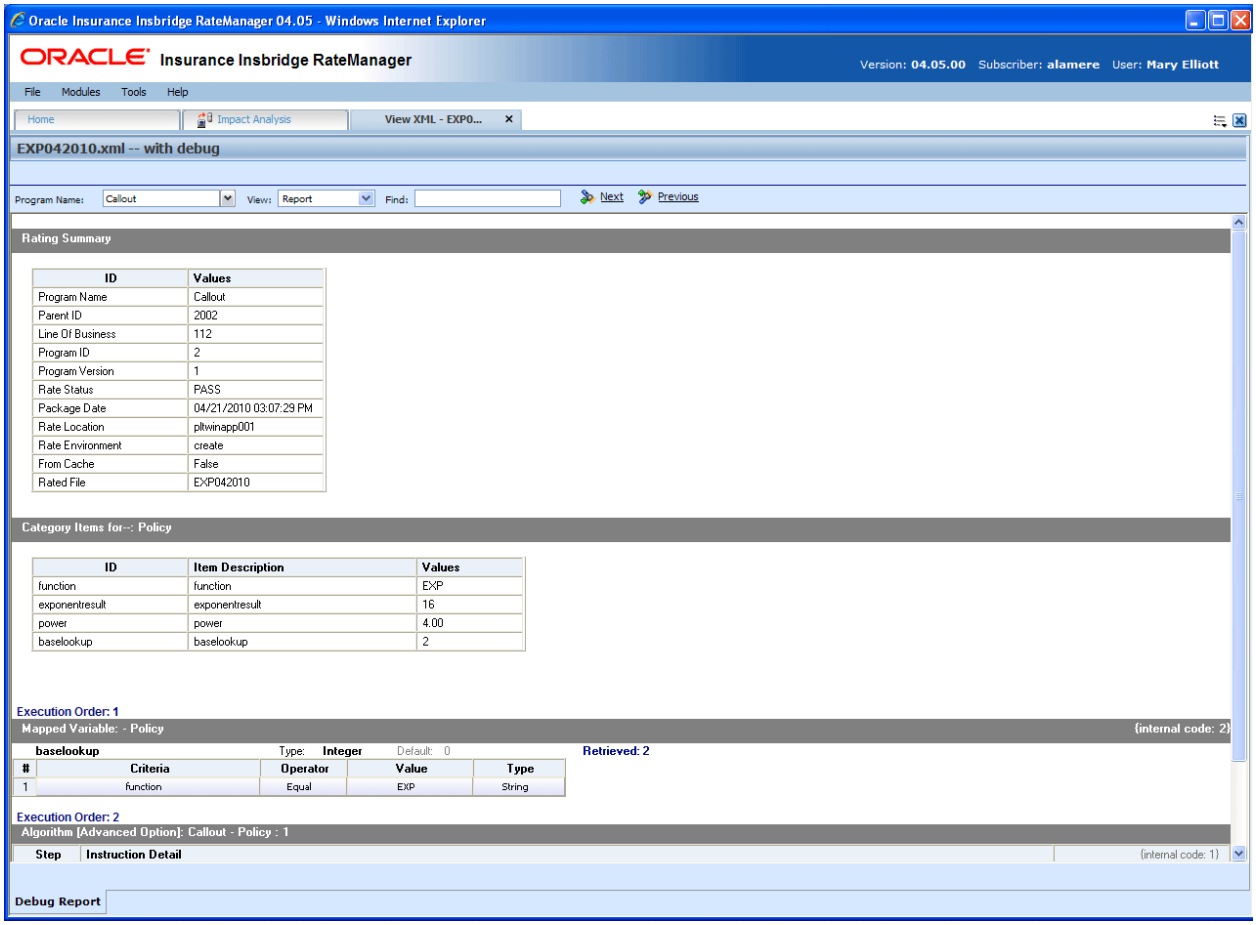


Figure 326 View Output Report

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

Navigation Bar

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

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

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

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

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

Advanced Options

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

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

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

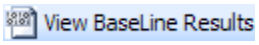
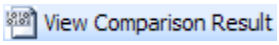
VIEWING BASELINE AND COMPARISON FILES

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

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

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

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

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

To View a BaseLine or a Comparison File

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

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

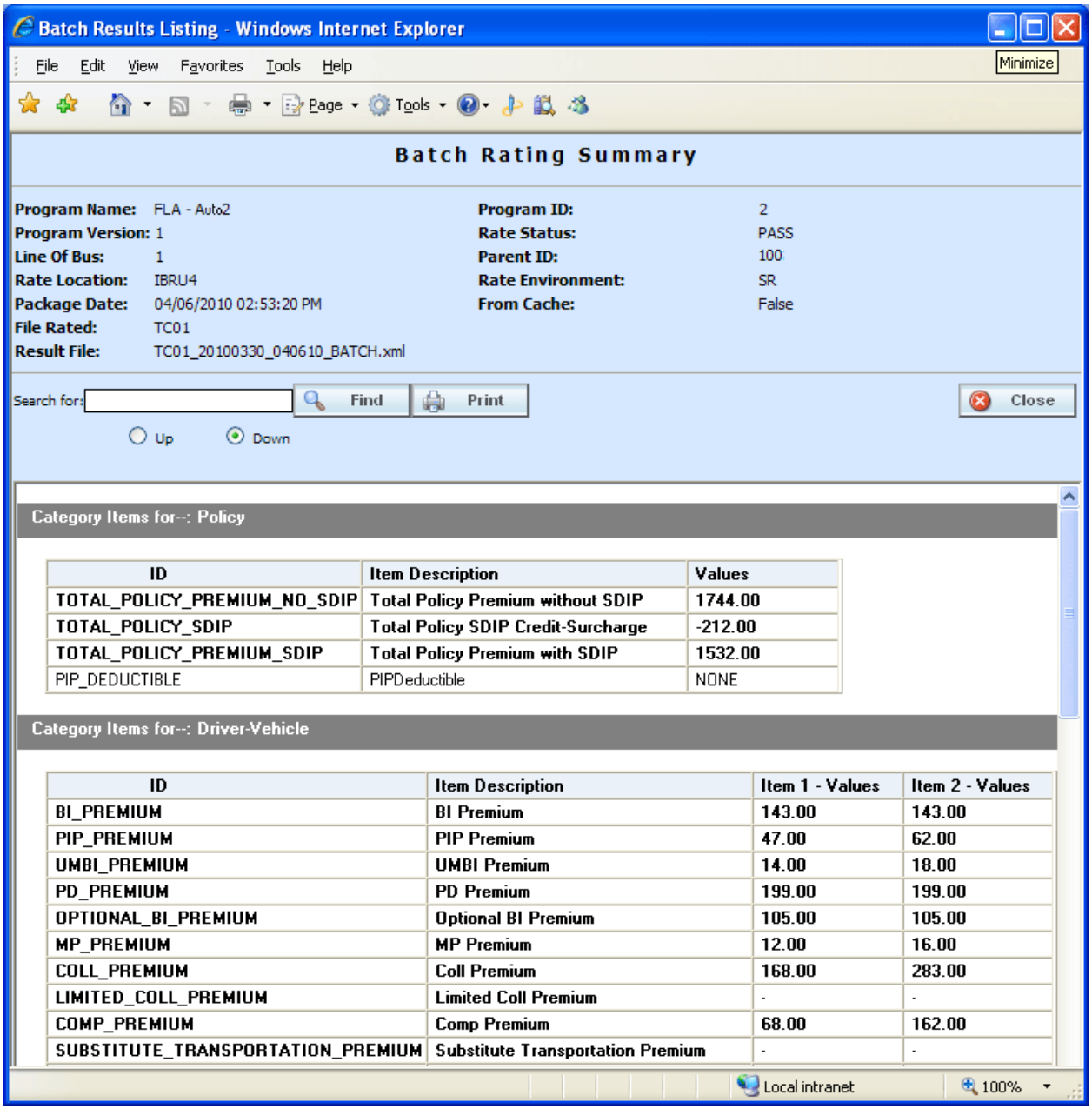


Figure 327 Viewing Baseline or Comparison Files

Program Information

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

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

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

Rate Location: Displays where the rate information is located.

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

File Rated: Name of the file rated.

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

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

Rate Status: The results of the rating request.

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

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

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

Search

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

Print

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

Close Window

Closes the current Rating Summary report.

Results

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

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

VIEWING A SCENARIO REPORT

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

To View a Impact Analysis Report

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

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

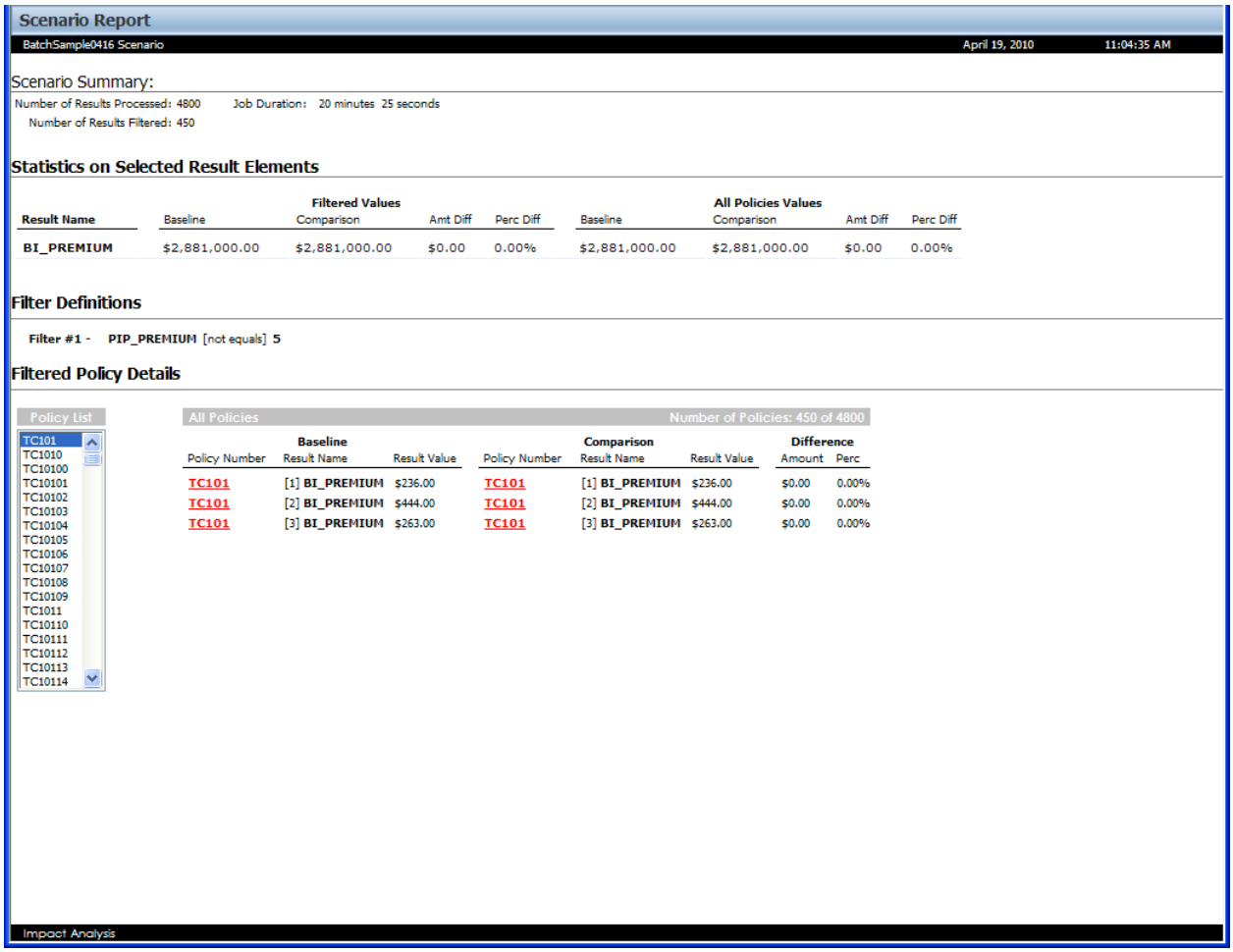


Figure 328 Impact Analysis Scenario Report

Scenario Summary

Number of Results Processed: The total number of policies.

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

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

Statistics on Selected Result Elements

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

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

Filtered Values

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

All Policy Values

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

Filter Definitions

A listing of all filters used for the current report.

Filtered Policy Details

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

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

Baseline

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

Comparison

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

Difference

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

RELEASES

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

Releases contains two *sub-tabs*:

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

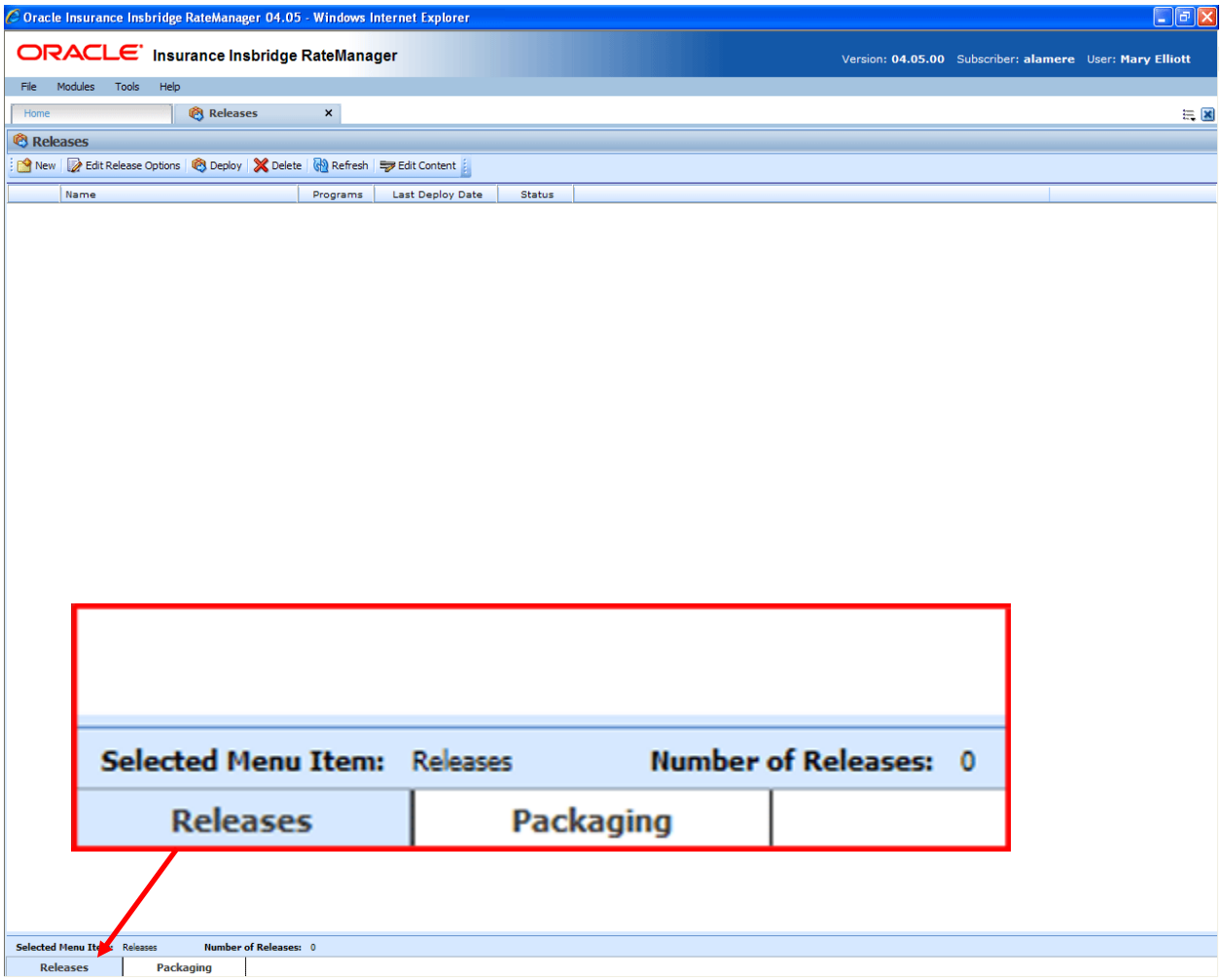
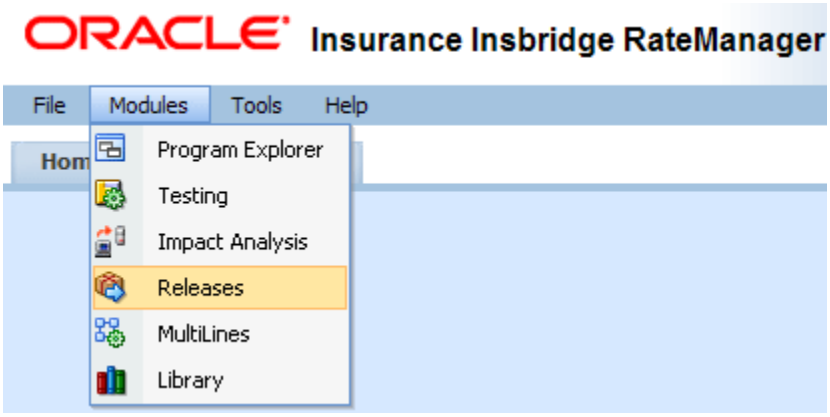


Figure 329 Releases Screen

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

To Navigate to Releases

1. Select Modules→**Releases**.



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

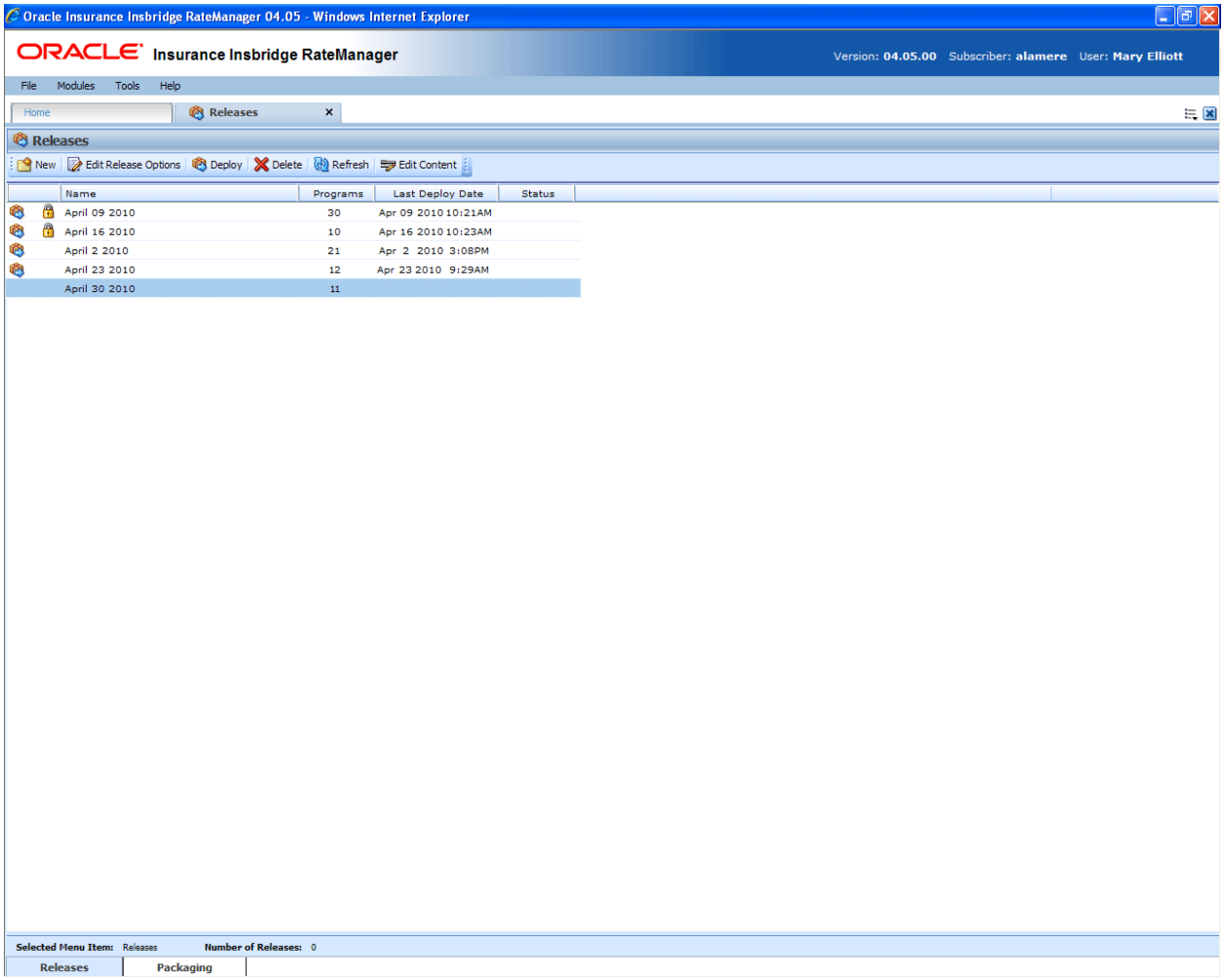


Figure 330 Releases Screen

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

Releases Security

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

RateManager Package Admin→Release Management

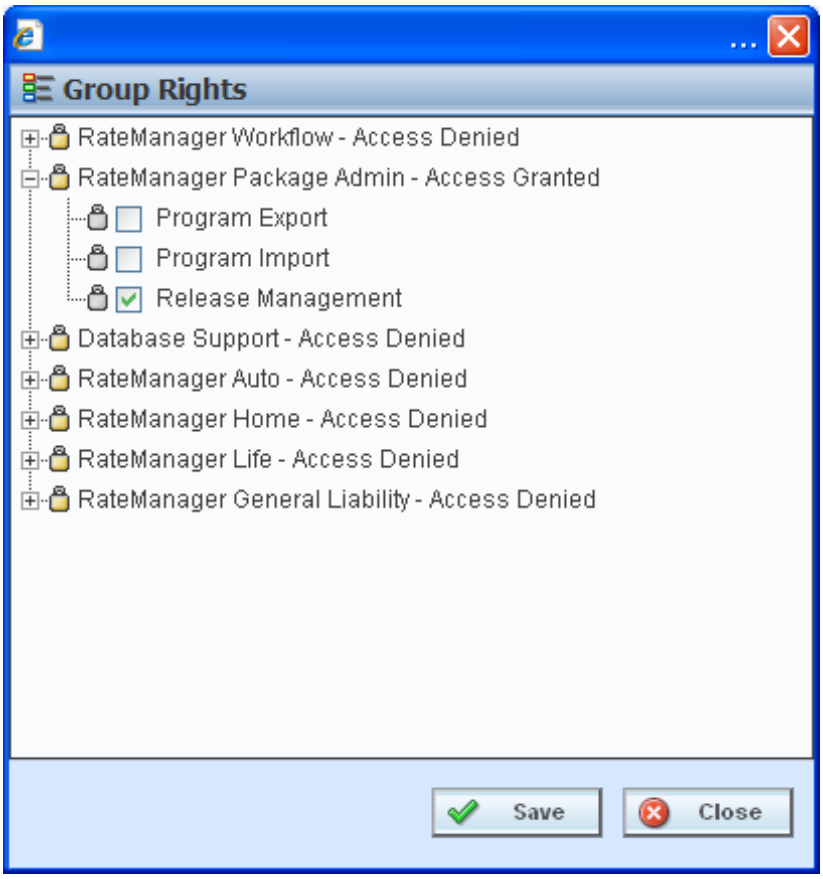


Figure 331 Release Manager Rights

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

RELEASES

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

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

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

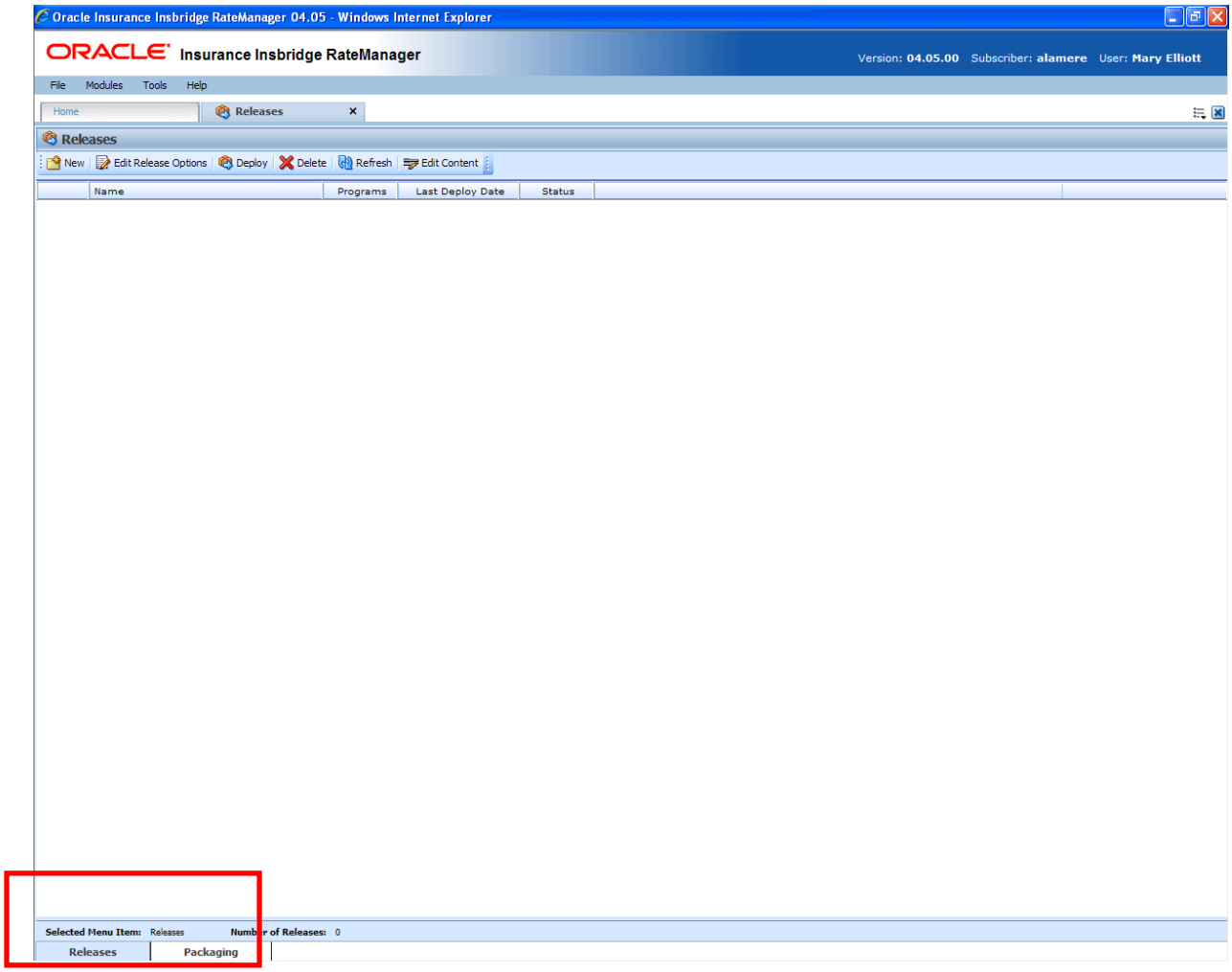
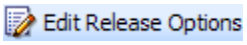
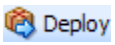
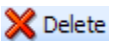
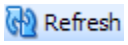
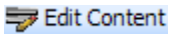


Figure 332 Releases Sub-Tab

FUNCTIONALITY

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

Functions:

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

FIELDS

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

Releases Listing

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

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

Name: Name of the release.

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

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

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

Right Click Options

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

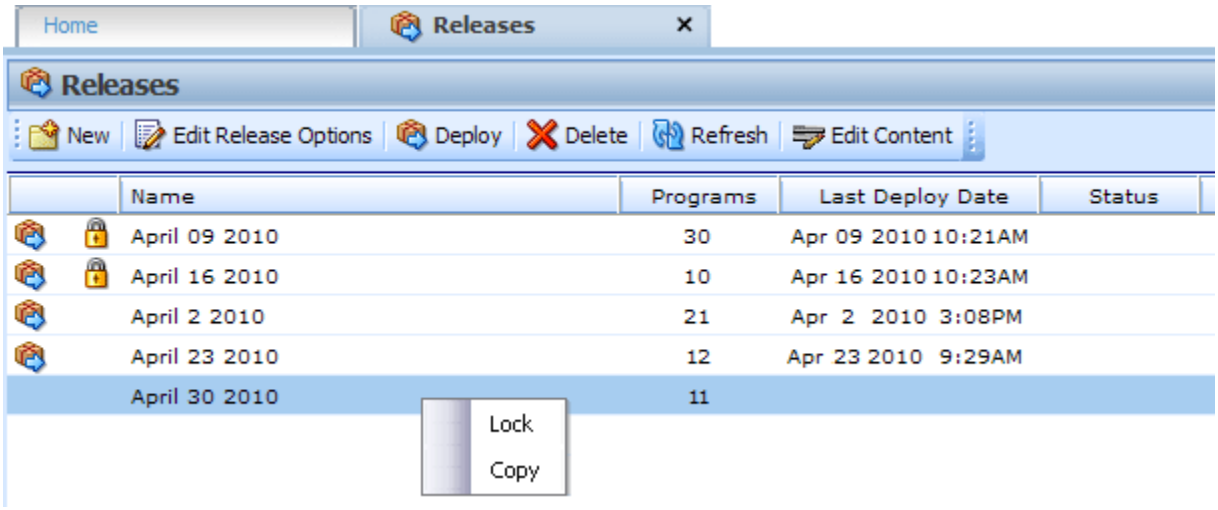


Figure 333 Right Click Menu for the Releases Listing

Releases Listing has two choices:

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

  OR

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

Enforce Release Packaging

Enforce Release Packaging is an option of Tools→Preferences.

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

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

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

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

CREATING A NEW RELEASE

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

To Create a New Release

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

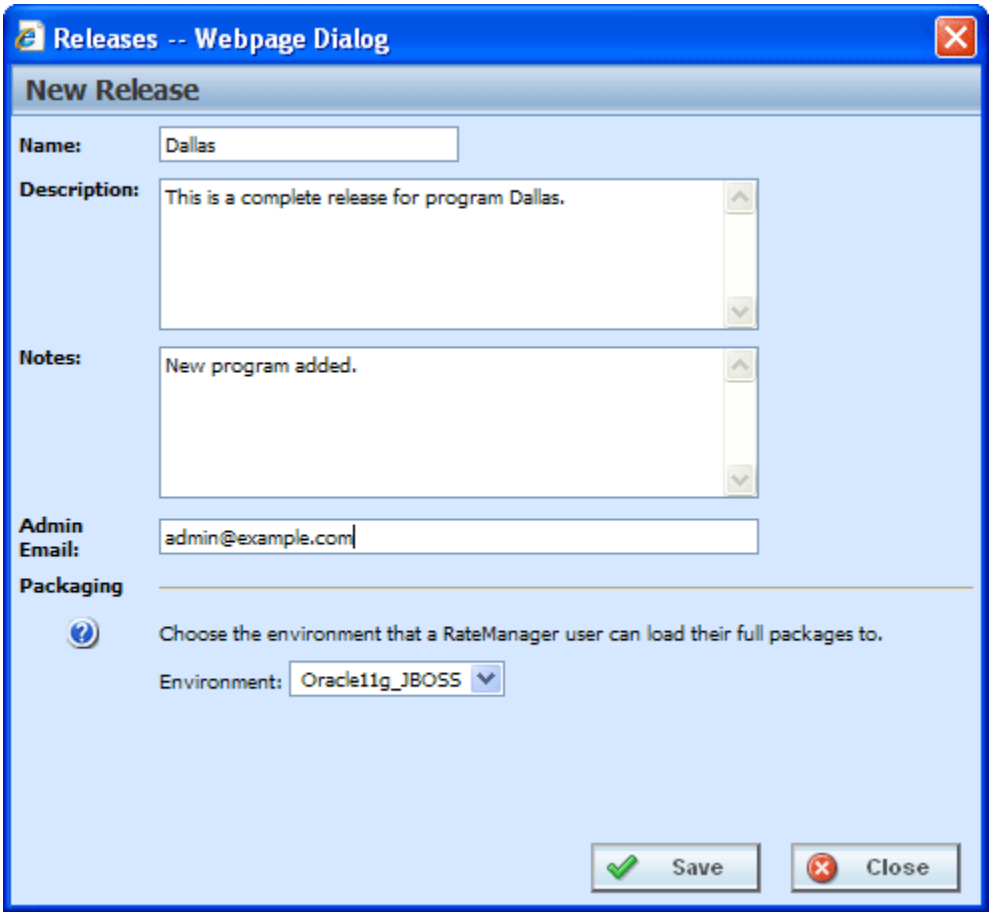


Figure 334 Creating New Release

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

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

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

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

Edit Release Options

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

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

Copy Releases

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

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

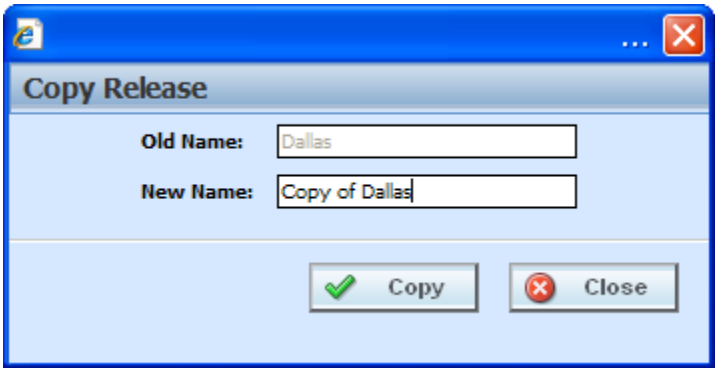


Figure 335 Copy Release

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

Locking a Release

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

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

Deleting a Release

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

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

Deploying a Release

A release can be deployed at any time.

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

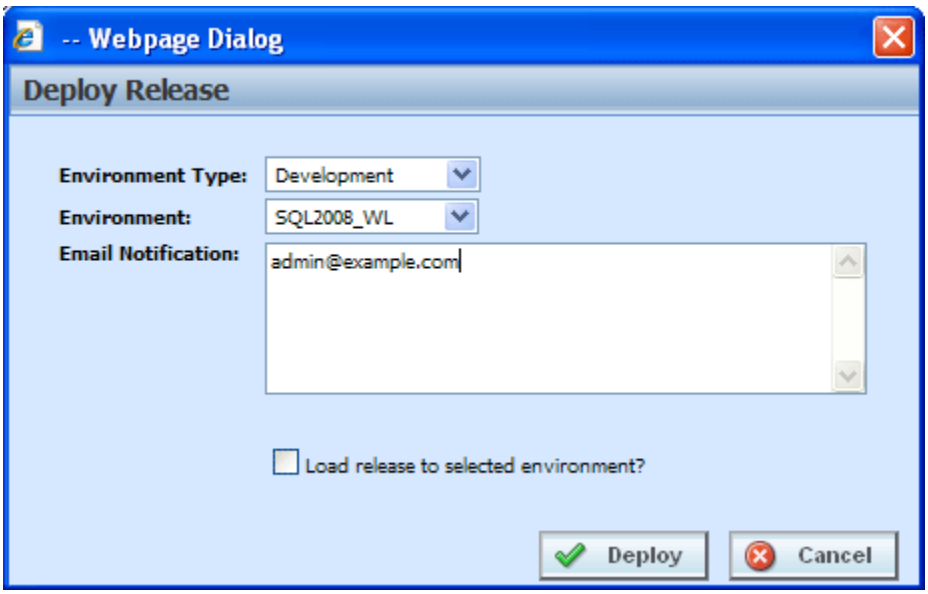


Figure 336 Deploying a Release

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

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

EDIT CONTENT TAB

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

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

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

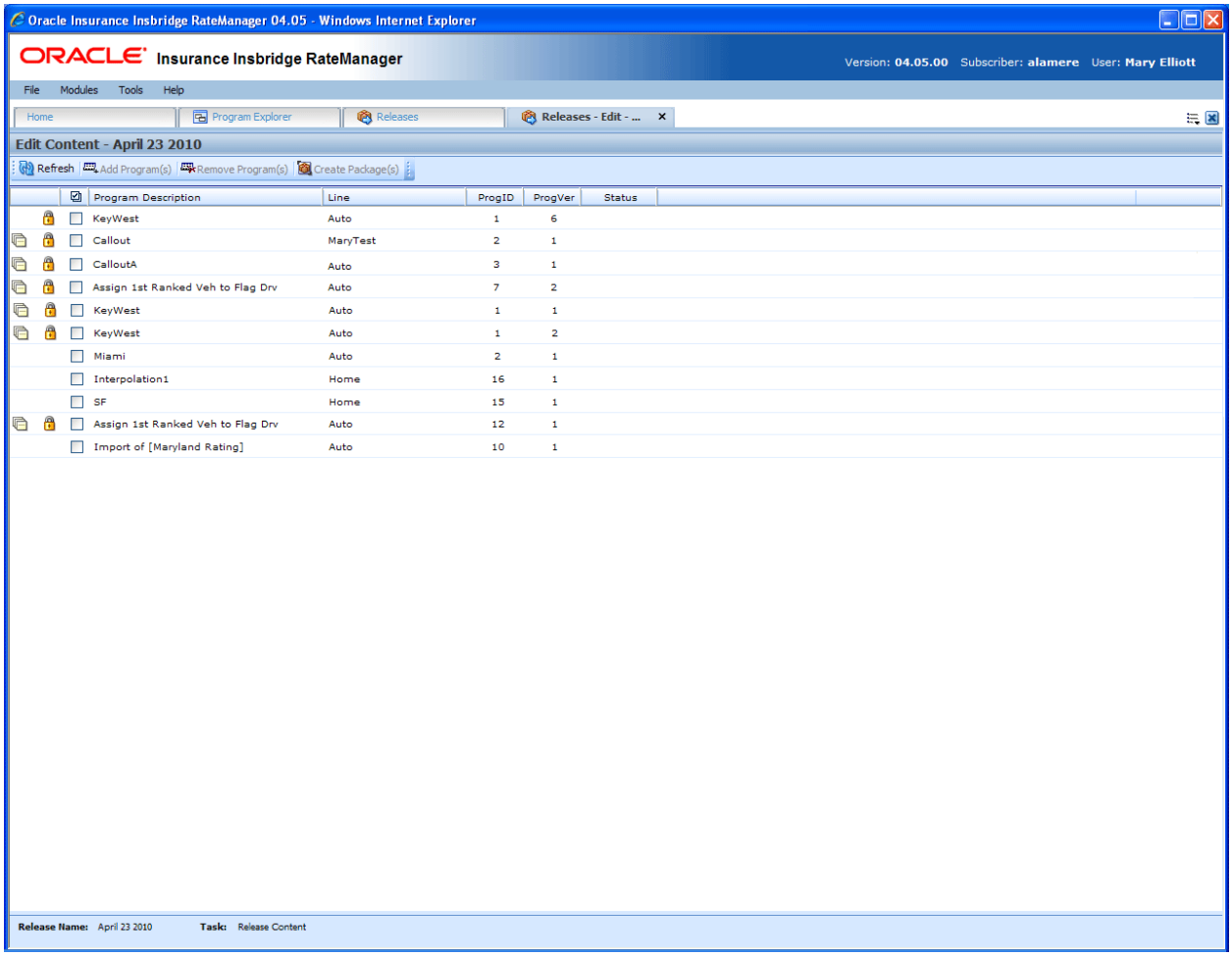
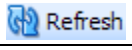
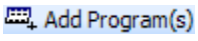
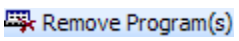
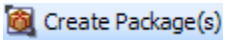


Figure 337 Edit Content for a Release

FUNCTIONALITY

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

Functions:

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

FIELDS

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

Edit Content Listing

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

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

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

Program Desc: The name of the program.

Line: The line of business for a specific program.

ProgID: The unique ID for a specific program.

ProgVer: The version number for a specific program.

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

Right Click Options

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

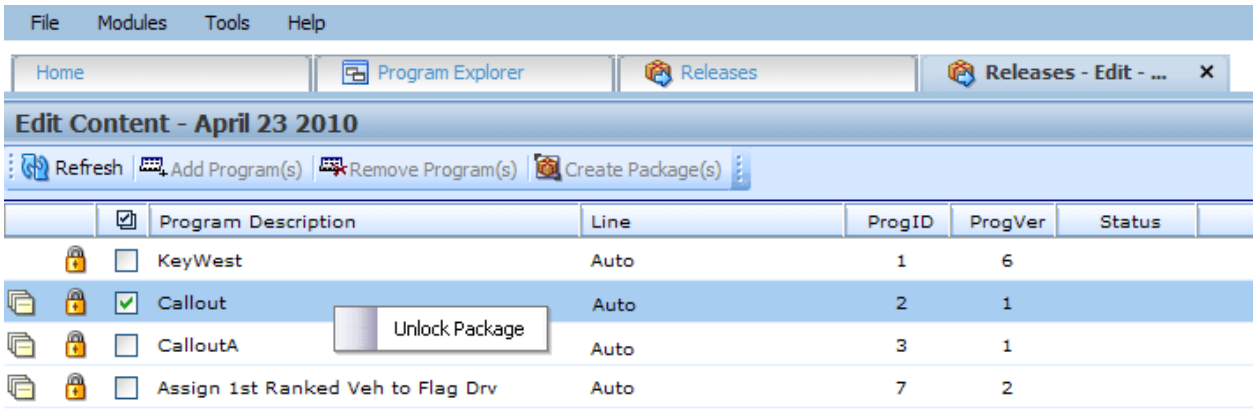


Figure 338 Right Click Menu for the Edit Content Listing

Edit Content Listing has one choice:

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

  OR

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

Locking a Package

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

To Lock a Package

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

Adding Programs to a Release

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

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

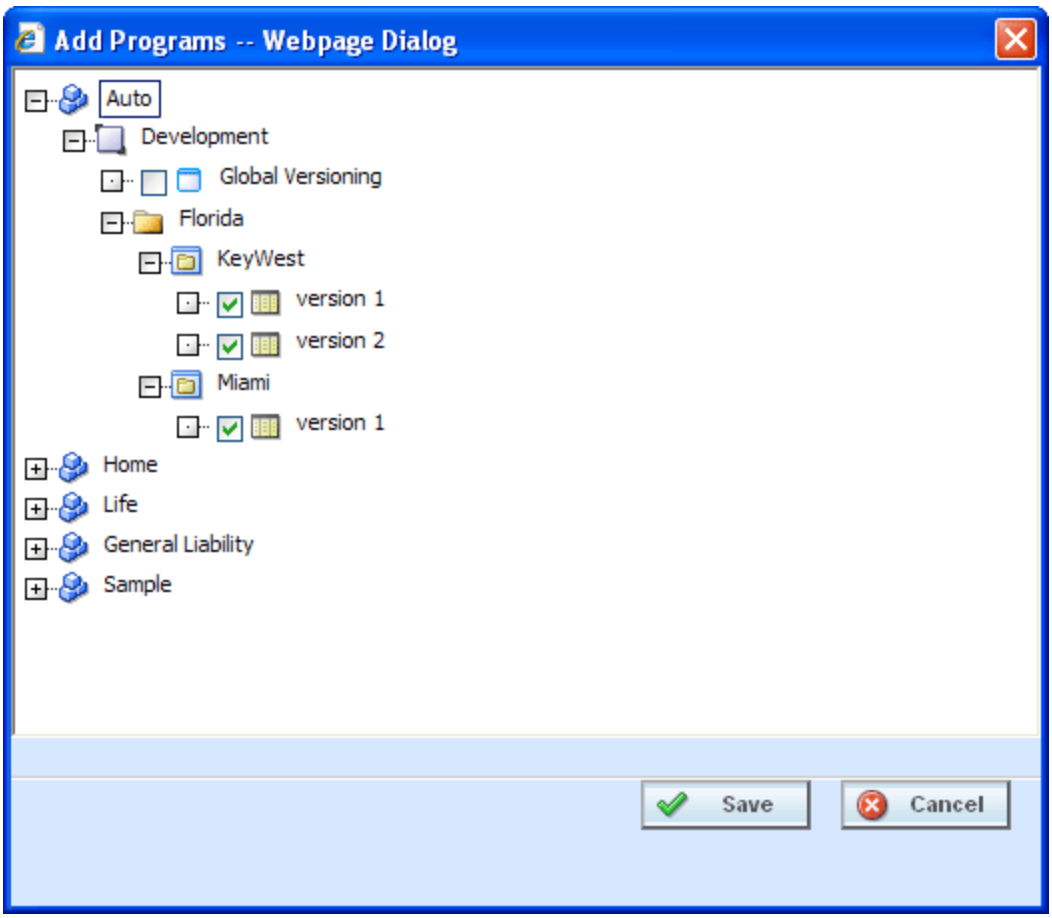


Figure 339 Selecting Versions to Add to a Program

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

Removing a Program

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

Creating Program Packages within a Release

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

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

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

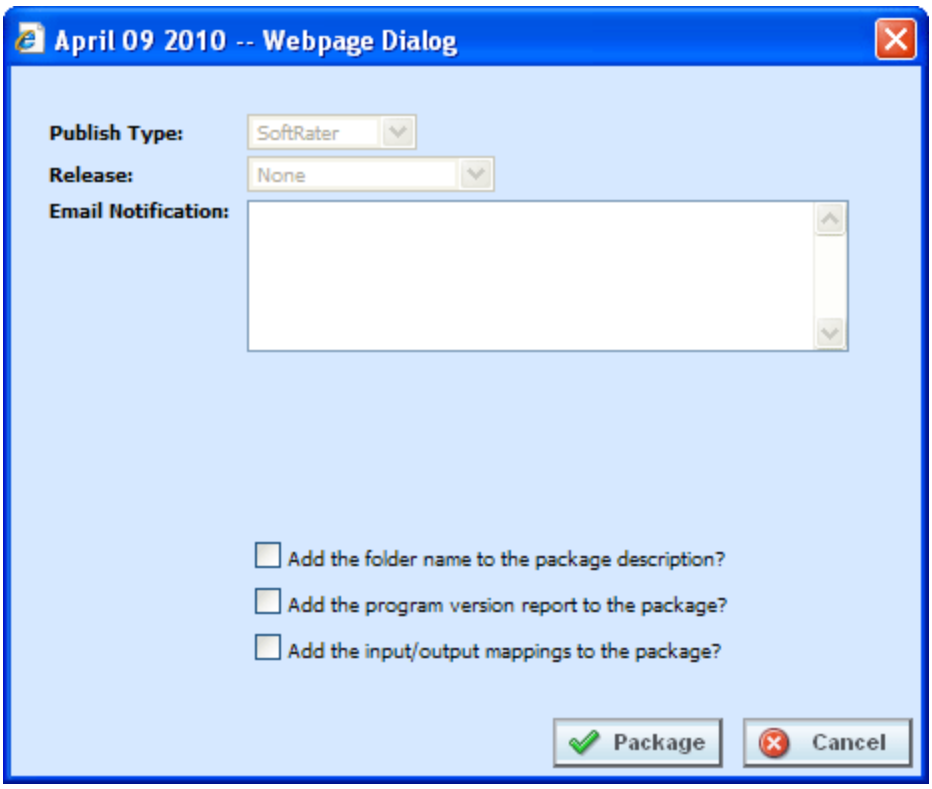


Figure 340 Packaging Programs for a Release

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

PACKAGING

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

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

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

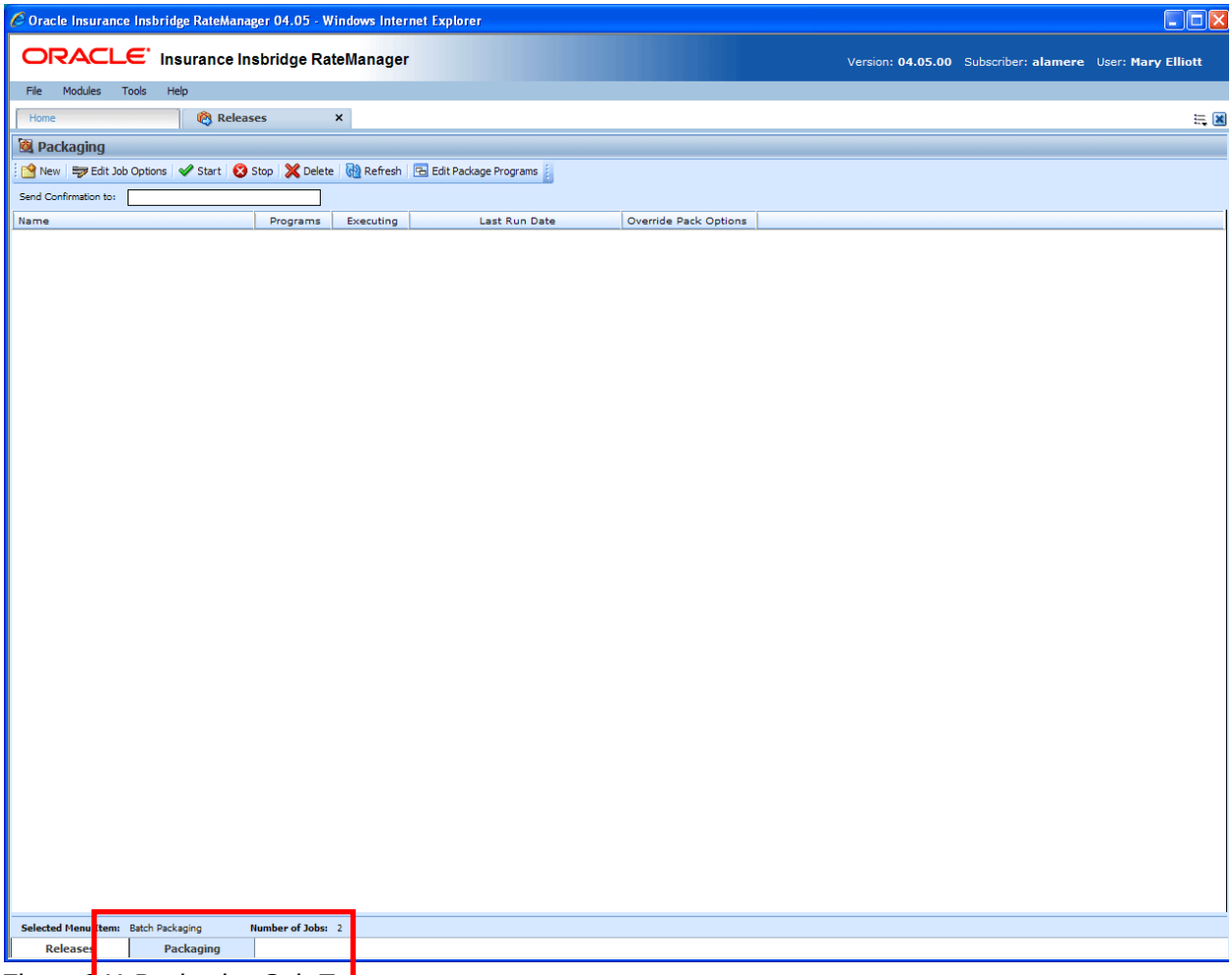
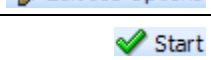
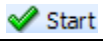
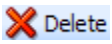
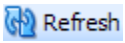
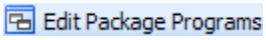


Figure 341 Packaging Sub-Tab

FUNCTIONALITY

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

Functions:

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

FIELDS

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

Packaging Listing:

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

Name: The name of the package job.

Programs: The number of programs that packaging job contains.

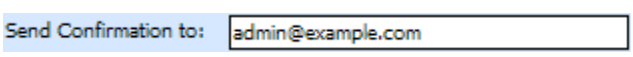
Executing: A checkmark indicates this packaging job is currently running. No checkmark indicates the packaging job is finished.

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

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

Definition Options:

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

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

Right Click Options

There are no right click menu options for Packaging.

CREATING A PACKAGING JOB

A packaging job can be created at any time.

To Create a New Packaging Job

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

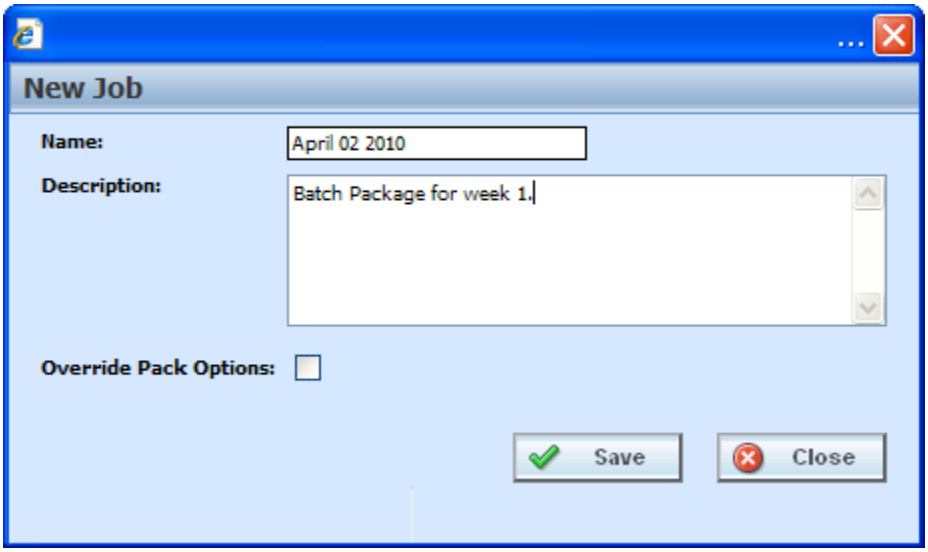


Figure 342 Creating New Job

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

Override Pack Options

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

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

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

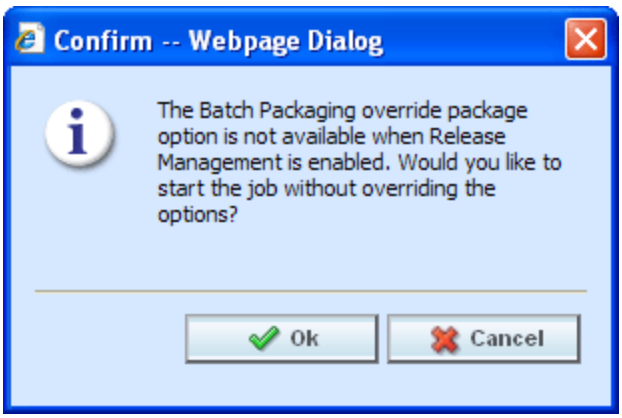


Figure 343 Override Batch Package Options Error

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

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

EDITING A PACKAGING JOB

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

To Edit a Packaging Job

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

START A PACKAGING JOB

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

To Start a Packaging Job: No Override

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

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

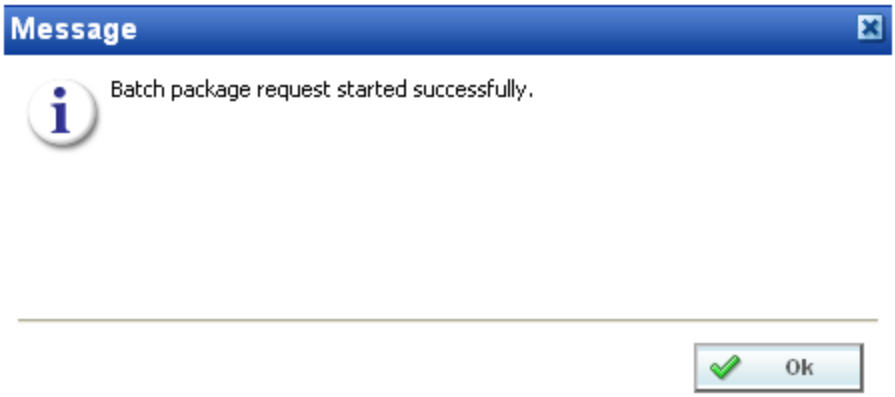


Figure 344 Starting a Batch

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

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

To Start a Packaging Job: Allowing for Override

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

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

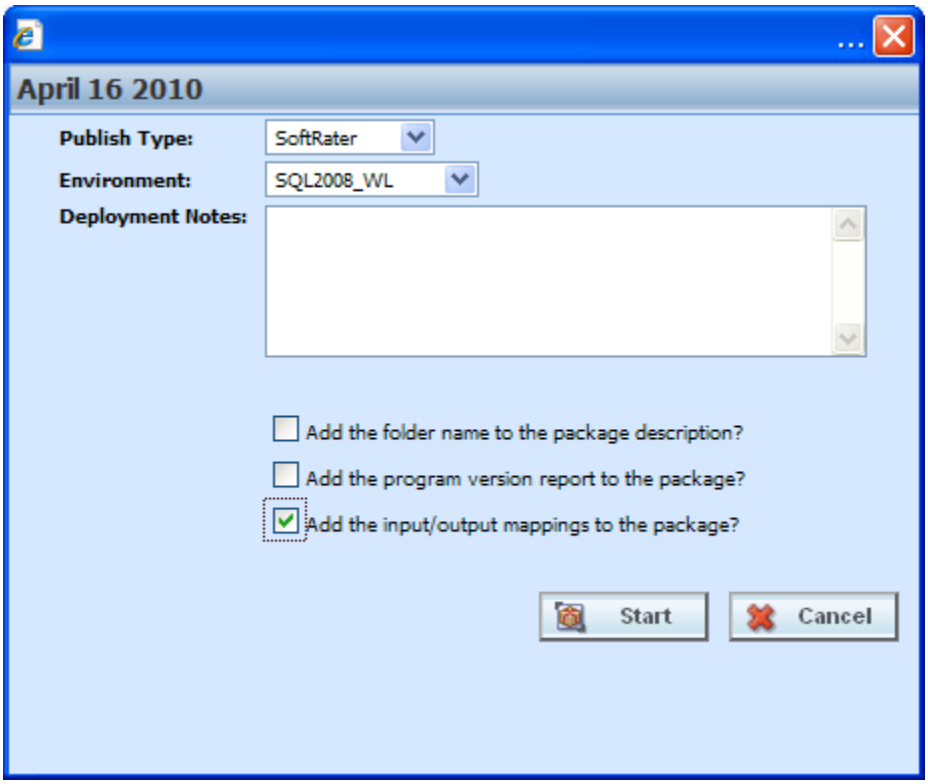


Figure 345 Editing Program Packaging Options Allowing for Override

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

Override Options

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

- RateManager (Local)
- SoftRater (Full)

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

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

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

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

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

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

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

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

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

STOP A PACKAGING JOB

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

To Stop a Packaging Job

1. Select the packaging job you want to stop.

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

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

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

DELETE A PACKAGING JOB

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

To Delete a Packaging Job

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

EDIT PACKAGE PROGRAMS TAB

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

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

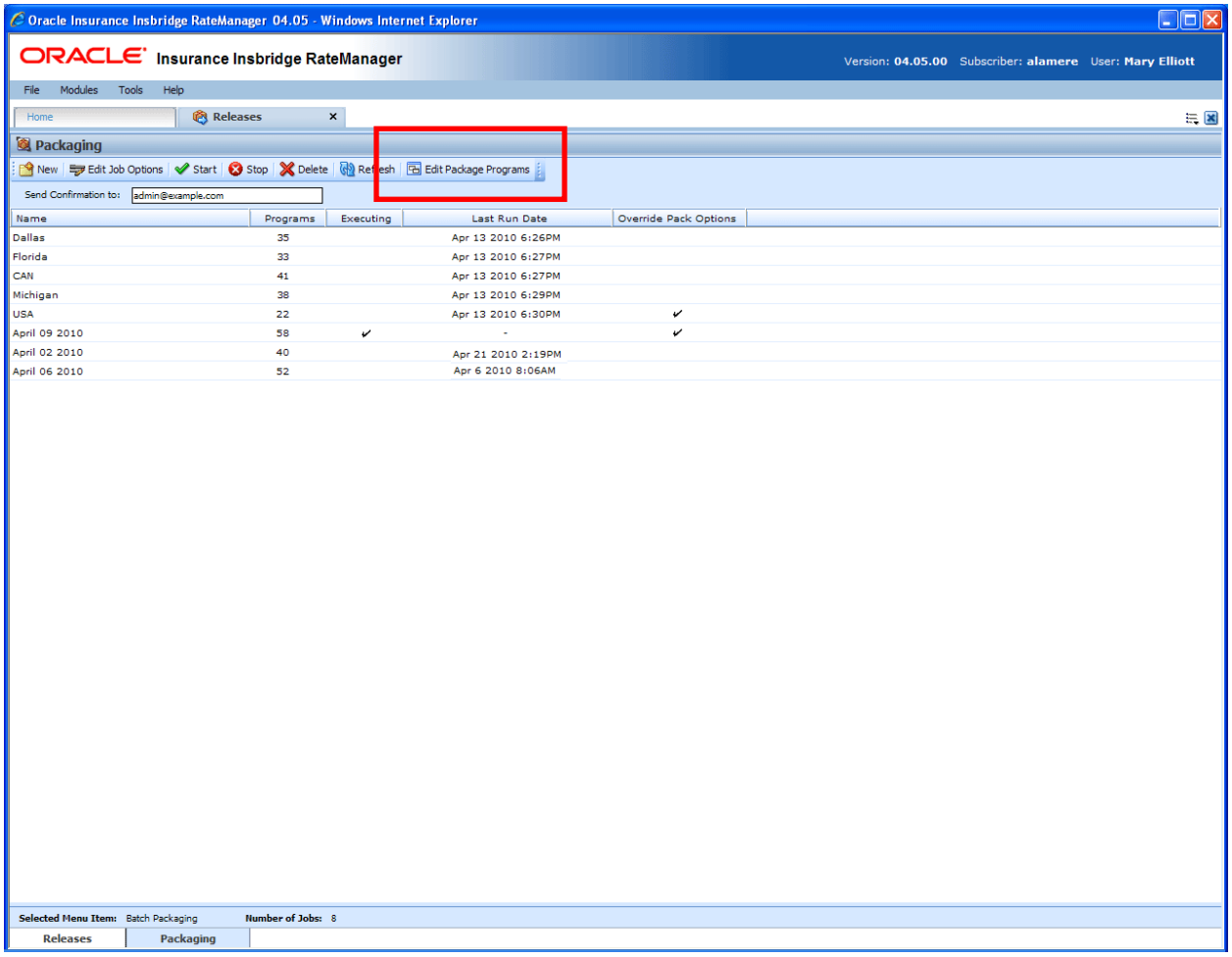


Figure 346 Programs Tab

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

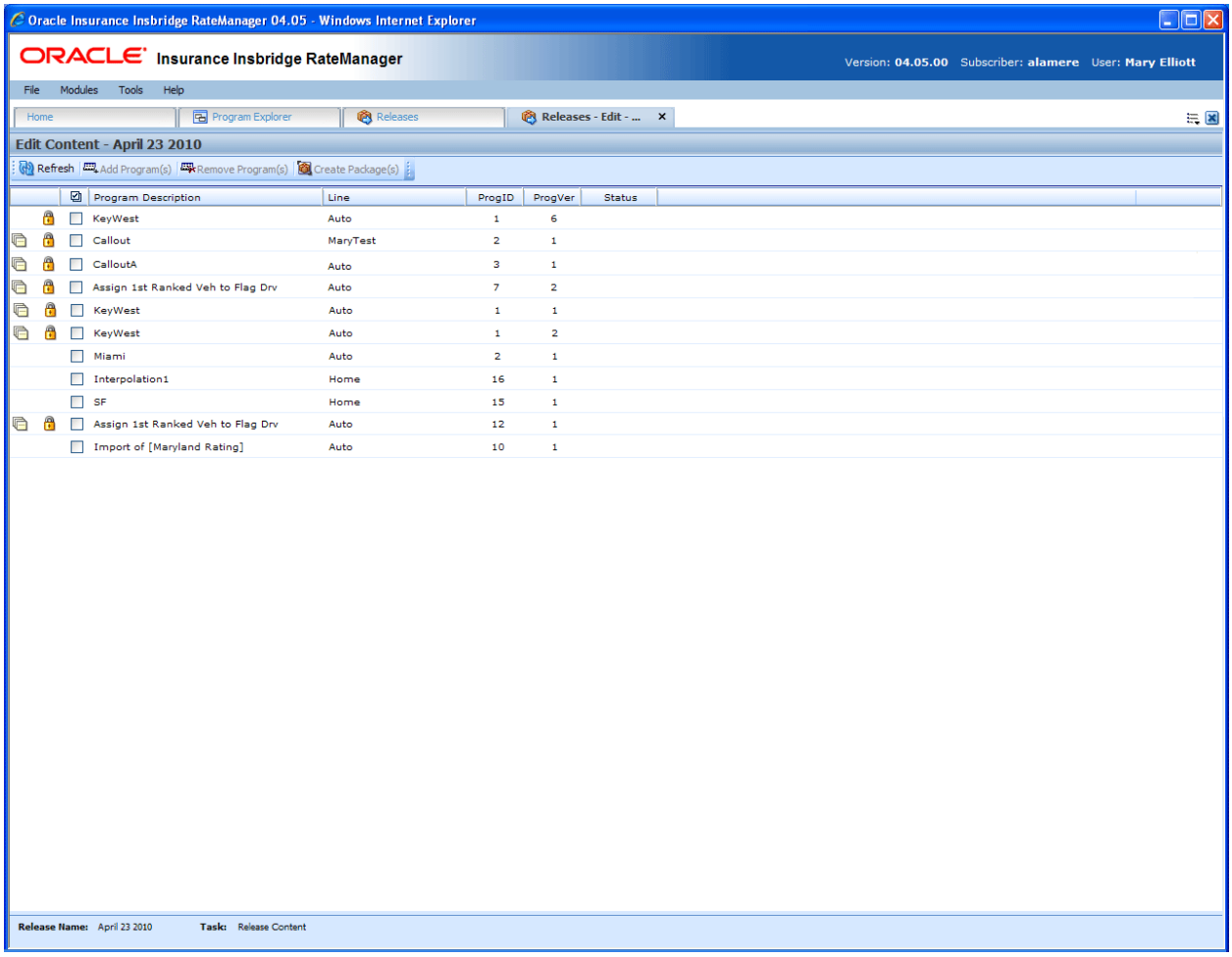


Figure 347 Edit Package Programs

FUNCTIONALITY

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

Functions:

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

FIELDS

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

Edit Package Program Listing

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

Program Desc: The name of the program.

Line: The line of business for a specific program.

ProgID: The unique ID for a specific program.

ProgVer: The version number for a specific program.

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

Right Click Options

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

Adding Programs to a Batch Packaging Job

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

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

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

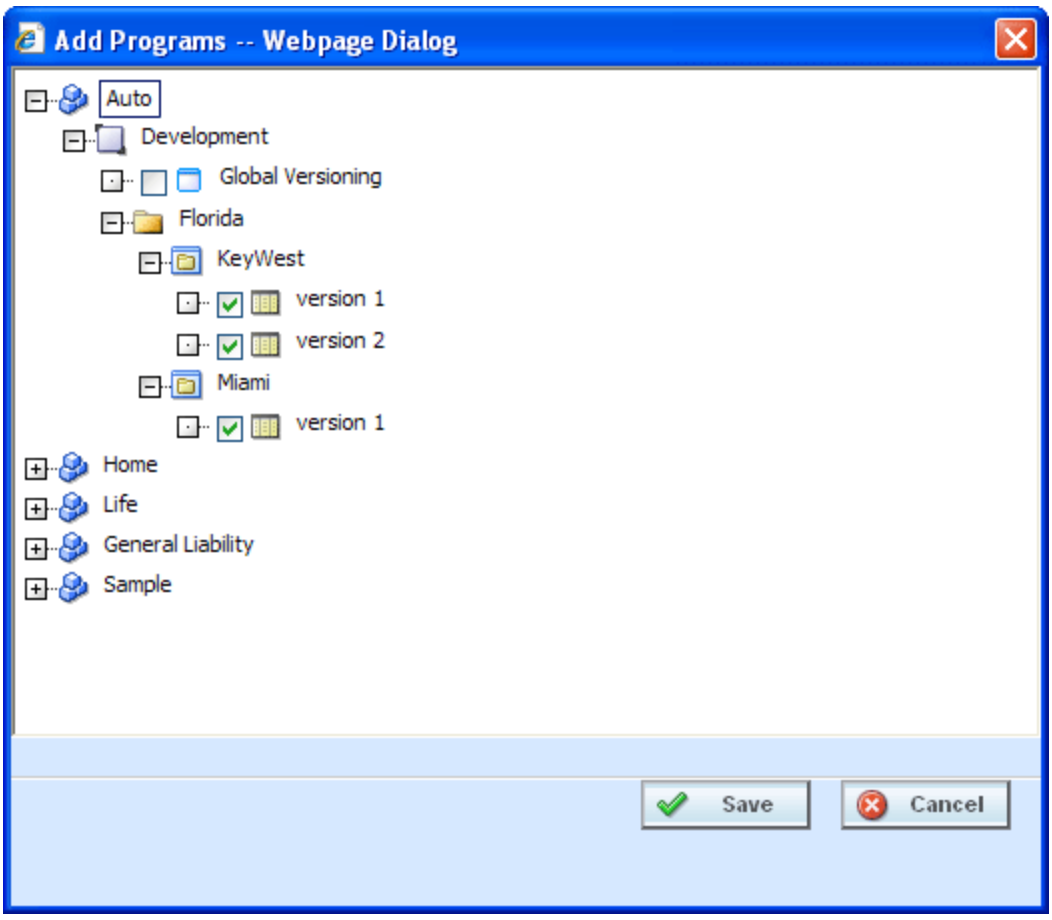


Figure 348 Selecting Versions to Add to a Program

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

Removing a Program

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

Editing Package Options

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

Editing Package Options: Allowing for Override

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

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

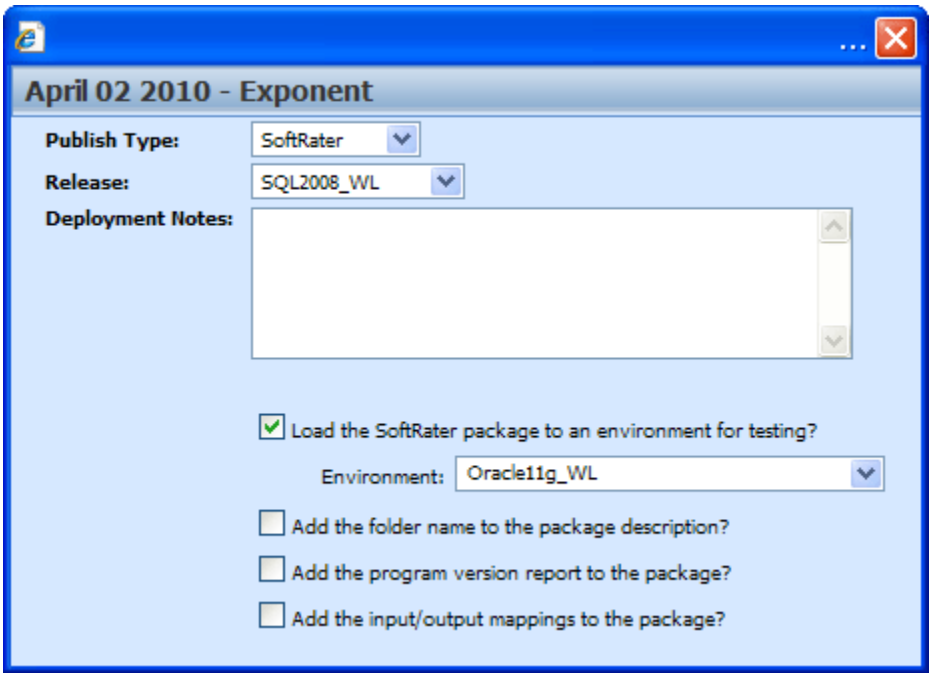


Figure 349 Editing Program Packaging Options Allowing for Override

Screen Options

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

- RateManager (Local)
- SoftRater (Full)

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

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

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

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

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

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

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

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

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

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

Editing Package Options: Not Allowing for Override

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

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

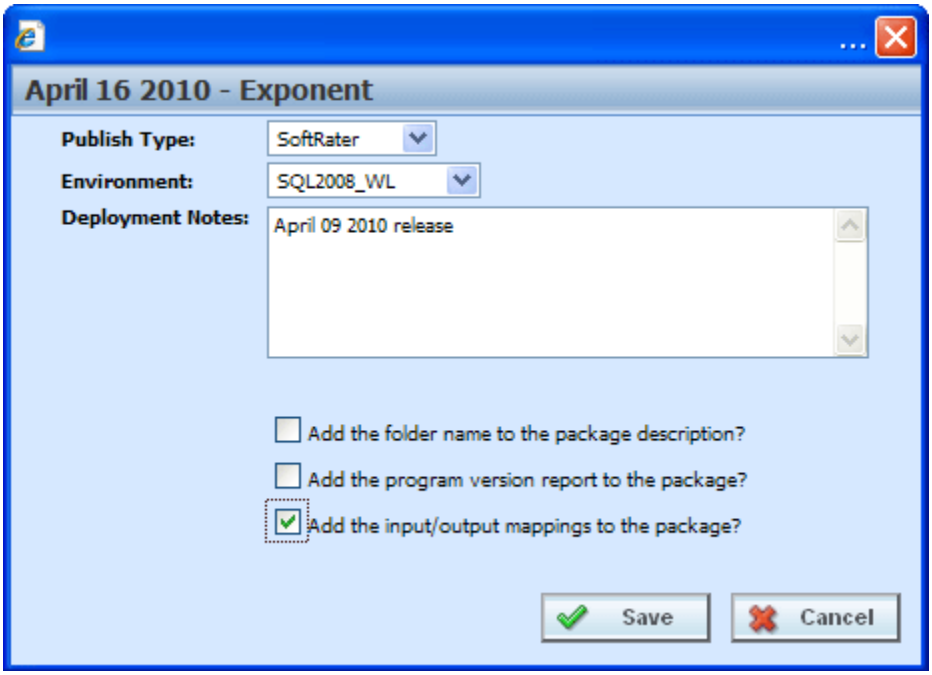


Figure 350 Editing Program Packaging Options Not Allowing for Override

Override Options

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

- RateManager (Local)
- SoftRater (Full)

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

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

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

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

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

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

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

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

Chapter 28

MULTILINES

The MultiLines tab allows you to create programs that can rate across line and sublines of business. MultiLines programs can hold one or more programs from any line of business and draw from user generated programs or template generated programs from the default subline or any template generated subline.

There are a few ways to design a MultiLines program. You can run each program with separate outcomes or you can create a holding program that can be used to return selected results or to return with totals. Inputs and results can be created to be passed down from program to program or to have to be passed into a totaling program. Each program can return as many results as needed.

MultiLines programs run in the sequence listed and can be used much like a program to program (P2P) callout. MultiLine programs differ from program callouts in one key area. MultiLines programs can cross lines of businesses and subline, program callouts cannot cross over lines or sublines.

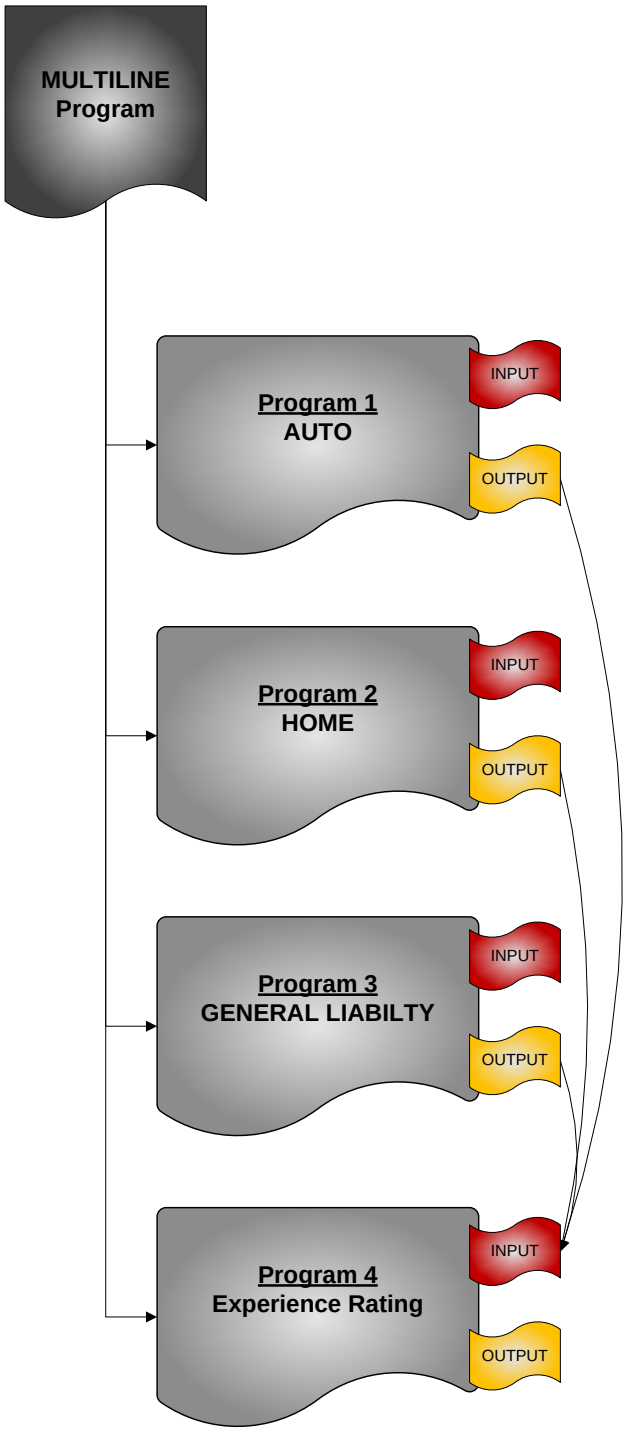
How you design your MultiLines program is up to you. MultiLines programs need to be planned out prior to entering the MultiLines tab. There are some things to remember when creating your programs for use in a MultiLines program:

- MultiLines inputs can be used in MultiLines scenarios only.
- MultiLines programs are one way programs where the results from prior programs can be used in any program underneath it, but results from any program underneath cannot be pushed back up to a prior program. When you create your programs, keep in mind that results can only flow from a previous program into a program that runs after it.
- Make note of any result you want to use in another program. Be sure to note the category and data type. Data types must match.
- Results from the previous program can be entered as inputs in the later program. The categories do not have to match. New inputs can be placed at the policy level.
- You can use global versioning. You must create a global versioning package for the program where you want to use global versioning.
- Mappings must be created for programs that will feed into each other. You do not have to create a mapping for the last program run.
- MultiLines programs run in the order sequenced.
- Each program has the option to run a specific version or use global versioning. Each program also can have a mapping assigned to it.
- After packaging, Multiline programs can be tested in the Testing Module. The testing report will contain each individual program and the multiline information.

The MultiLines tab is available from the Modules menu or from the MultiLines snap in the Control Panel on your Home tab. The MultiLines tab requiresis permissions to view and to perform tasks. If you do not have permissions, please contact your system administrator.

SAMPLE SUMMARY MULTILINE PROGRAM

A multiline program can be designed so that the outputs from each individual program flow into a final summary program. This format may require an additional program be created to act as the summary program, or you can use an existing program as the summary program.



Mappings in a summary multiline program format flow from each individual program to a final summary program.

When you create the individual programs, make note of each output that needs to be passed to the summary program. Corresponding inputs must be created in the summary program. Data types must match.

FOR EXAMPLE: The mapping for program 1 requires that program 1 be the source and program 4 the target. No additional inputs would be needed in program 1.

The mapping for program 2 requires that program 2 now be the source and program 4 remain the target. No additional inputs would be needed in program 2.

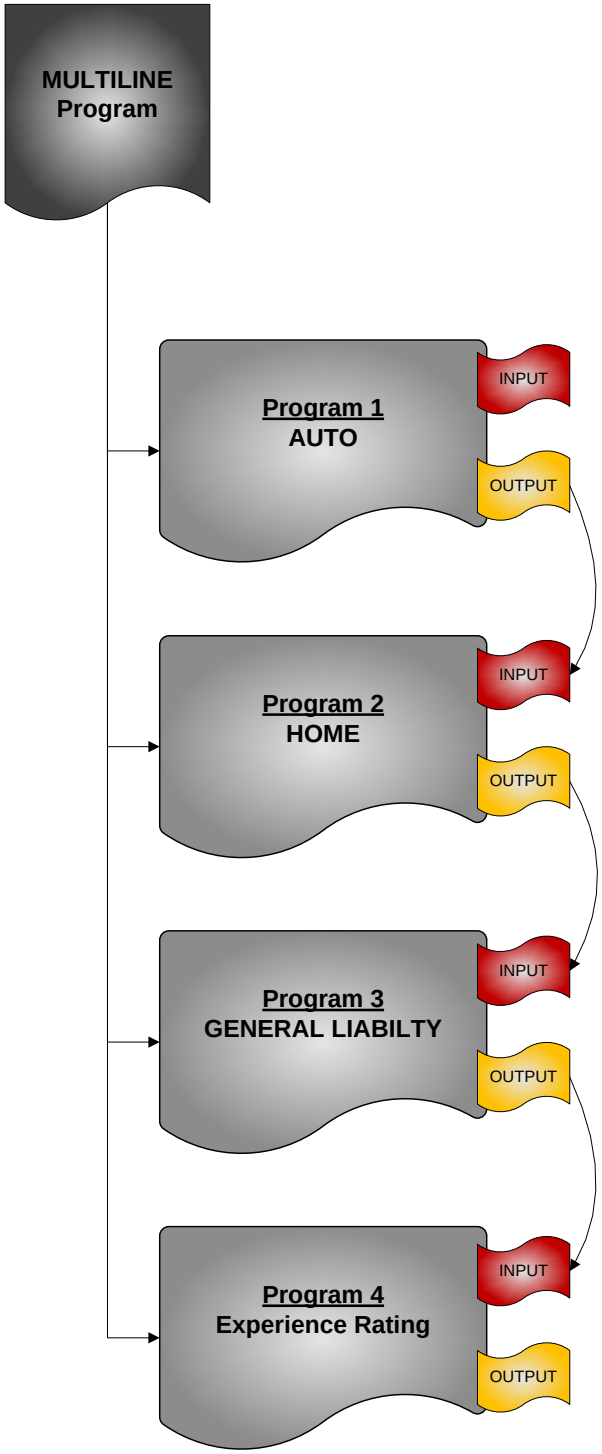
The mapping for program 3 requires that program 3 now be the source and program 4 remain the target. No additional inputs would be needed in program 3.

Program 4 would not require any mapping. Program 4 does require inputs for each output that is to be passed in from programs 1, 2 and 3.

The benefit to building a summary multiline program is that you can have a single program that holds only the results you need from multiple programs over multiple lines of business. Only the final summary program would require additional inputs. Further calculations could be done

SAMPLE CASCADING MULTILINE PROGRAM

A multiline program can be designed so that outputs flow into the next program called. A cascading style may be used when you want to use the output from one program to rate the next program. This style can use an optional summary program as the last program to gather totals.



Mappings in a cascading multiline program must flow from one program to another.

When you are creating the programs, you will have to make note of each output that will be passed to the next program. Corresponding inputs must be created in the receiving program. Data types must match.

The mapping for program 1 requires that program 1 be the source and program 2 the target. No additional inputs would be needed in program 1.

The mapping for program 2 requires that program 2 now be the source and program 3 the target. Program 2 requires inputs for each output that is to be passed in from program 1.

The mapping for program 3 requires that program 3 now be the source and program 4 the target. Program 3 requires inputs for each output that is to be passed in from program 2.

Program 4 would not require any mapping. Program 4 does require inputs for each output that is to be passed in from program 3.

INPUTS

MultiLines programs have inputs that are specific to MultiLines programs and are not used elsewhere in RateManager. MultiLines inputs are entered like any other input variables in the system. See Input Variables for more information.

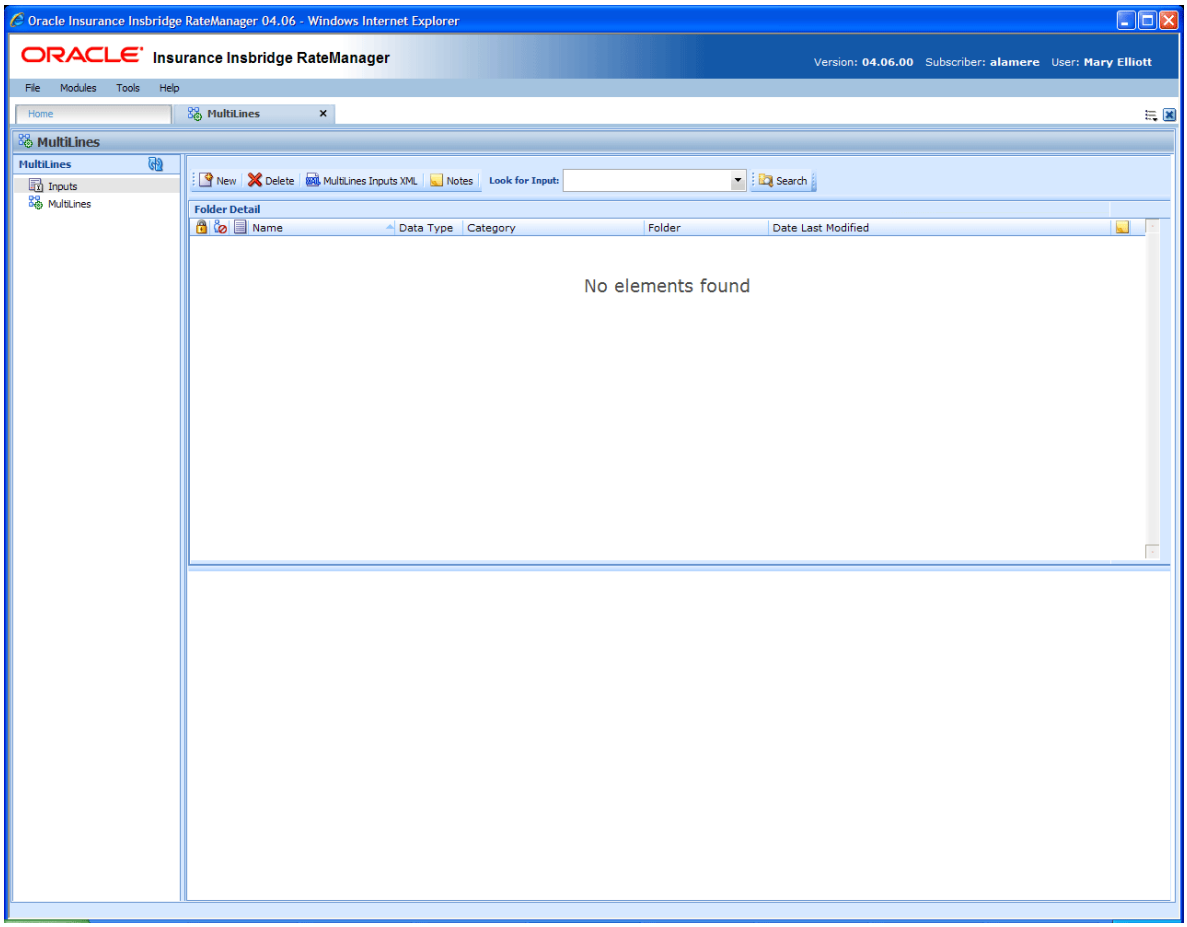


Figure 351 MultiLines Inputs

FUNCTIONALITY

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

New	**New:** Creates a new input.
Delete	**Delete:** Deletes the currently selected input.
MultiLines Inputs XML	**MultiLines Inputs XML:** View XML for the MultiLines Inputs.
Notes	**Notes:** Allows you to enter, edit and view notes to the input.

	Look For Input: Allows you to search the list of inputs. Enter in a part or the entire name you are looking for and click **Search**. To display all variables again, clear this box and select **Find**.
	Search: Searches for the criteria entered in the Look for Input field.

FIELDS

Inputs can be sorted by the Name, Data Type and Date Last Modified fields. To change the order, click the field you want to sort by. The default view is alphabetically by Name. You can sort results as many times as you want. Sorting does not filter results. It only rearranges the order in which they are displayed.

Icon: There are two icon fields:

Locked. A lock in this field indicates that the input is locked.

In-Use. Indicates that the input is being worked on by another user.

Name: The name of the input.

Data Type: The type of input variable, i.e. date, decimal, integer or string.

Category: The category of the input variable.

Folder: The folder location of the input.

Date Last Modified: The date and time of the last update.

Notes: Indicates that a Note or change control has been placed on this input.

Right Click Menu

MultiLines Inputs has a right click menu that has features not found on the menu bar.

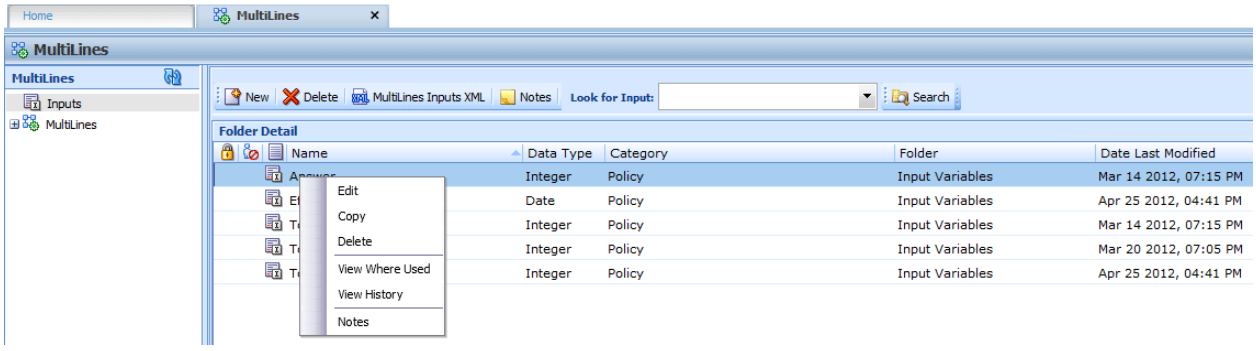


Figure 352 MultiLines Inputs Right Click Menu

- **Edit:** Allows you to edit the input variable.

- **Copy:** Allows you to make a copy of the selected input variable.
- **Delete:** Deletes the selected input variable.
- **View Where Used:** Clicking View Where Used displays an information screen that details where the variable is being used. Available to all locked and unlocked variables. For more information see View Where Used.
- **View History:** Displays a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. For more information see View History.
- **Notes:** Opens up the notes screen where you can add, edit, view, and delete notes for the input.

Creating a New MultiLines Variable Input

New MultiLines variables can be added at any time. There is no limit to the number of variables you can enter. All MultiLines inputs are under the policy category.

1. Navigate to **MultiLines**.
2. Click once on **New** to open the New Input Variable popup.

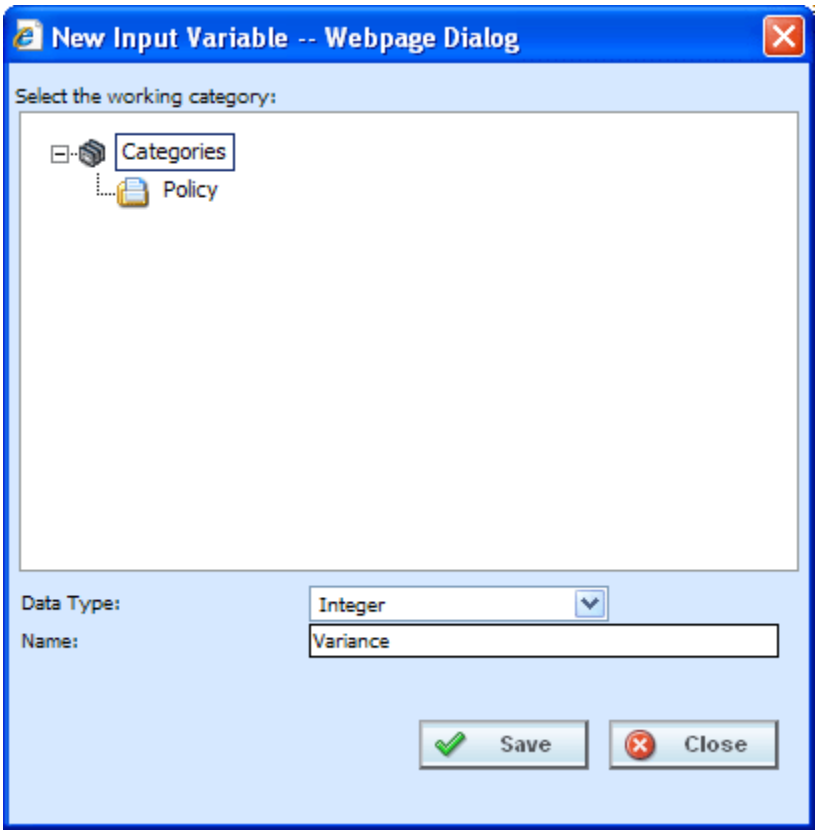


Figure 353 Creating a New MultiLines Input

3. Select the **Data Type** from the drop down menu.
4. Enter in an Input **Name**.
5. Click **Save** to save your work and close the popup.

Editing a MultiLines Input

Editing is performed on the same screen as entering a new MultiLines input.

1. To edit an input, double-click the input you want to change. The Edit Input Variable popup will be displayed. You also can right click and select **Edit** from the menu.

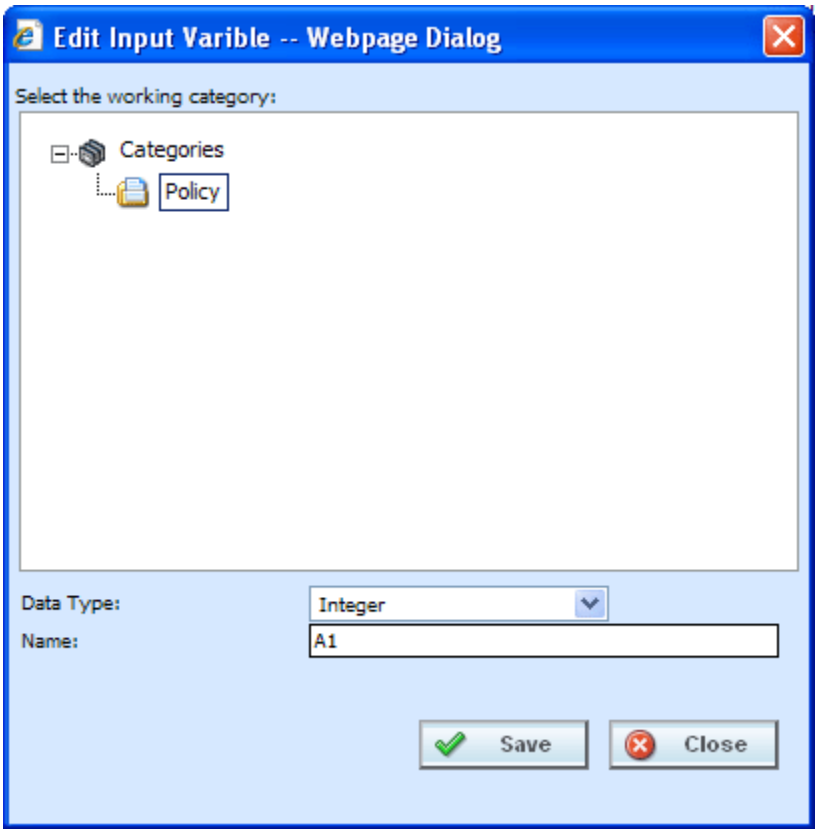


Figure 354 Editing a MultiLines Input

2. Make your changes.
3. Click **Save** to save your work and close the popup.

Copying a MultiLines Input

Any MultiLines input can be copied at any time. The data type of the copied input is the same.

1. To copy an input, select the input you want to copy and right click. Select **Copy** from the menu.

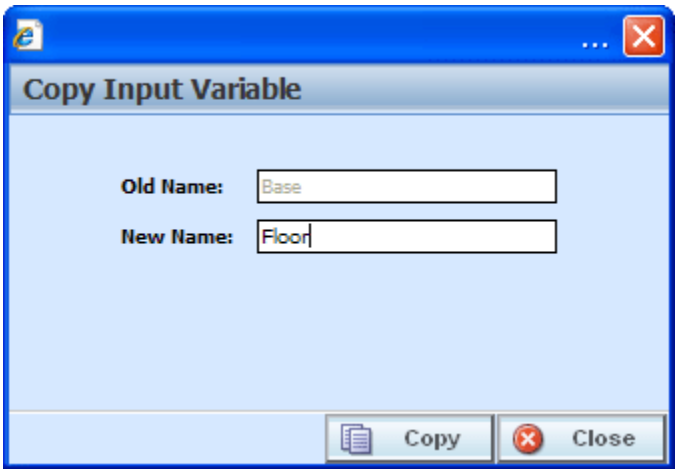


Figure 355 Copying a MultiLines Input

2. Enter the **New Name**.
3. Click **Copy**. Your MultiLines input will be listed on the MultiLines Input listing.

Deleting a MultiLines Input

A MultiLines Input Variable can be deleted at any time. There are no restrictions when deleting an input variable. Be sure when you delete, this is a permanent removal.

1. To delete an input variable, select the one you want to remove.
2. Click **Delete** or you can right click and select Delete from the menu. A warning message is shown.

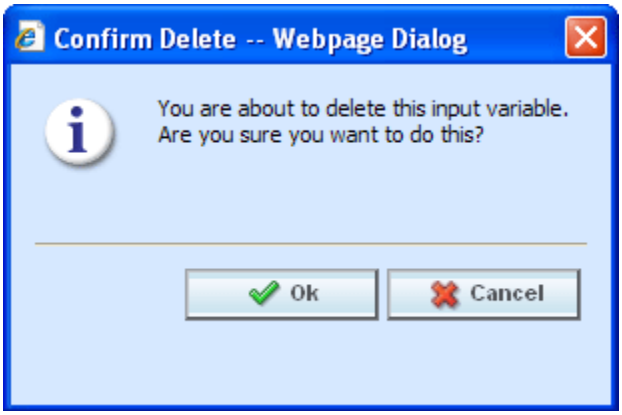


Figure 356 Deleting a MultiLines Input

3. Click **Yes** to delete or **No** to cancel out of the delete.

MultiLines Inputs XML

Clicking **MultiLines Inputs XML** brings up a popup that shows a listing of inputs that you can copy.

To View MultiLines Inputs XML

1. Navigate to the **MultiLines.** Select Inputs. The main MultiLines Inputs screen is shown.
2. Click the input that you want to view the XML for.
3. Click **MultiLines Inputs XML** in the menu bar.
4. The popup box that opens allows you to view, copy or print the XML for this input.

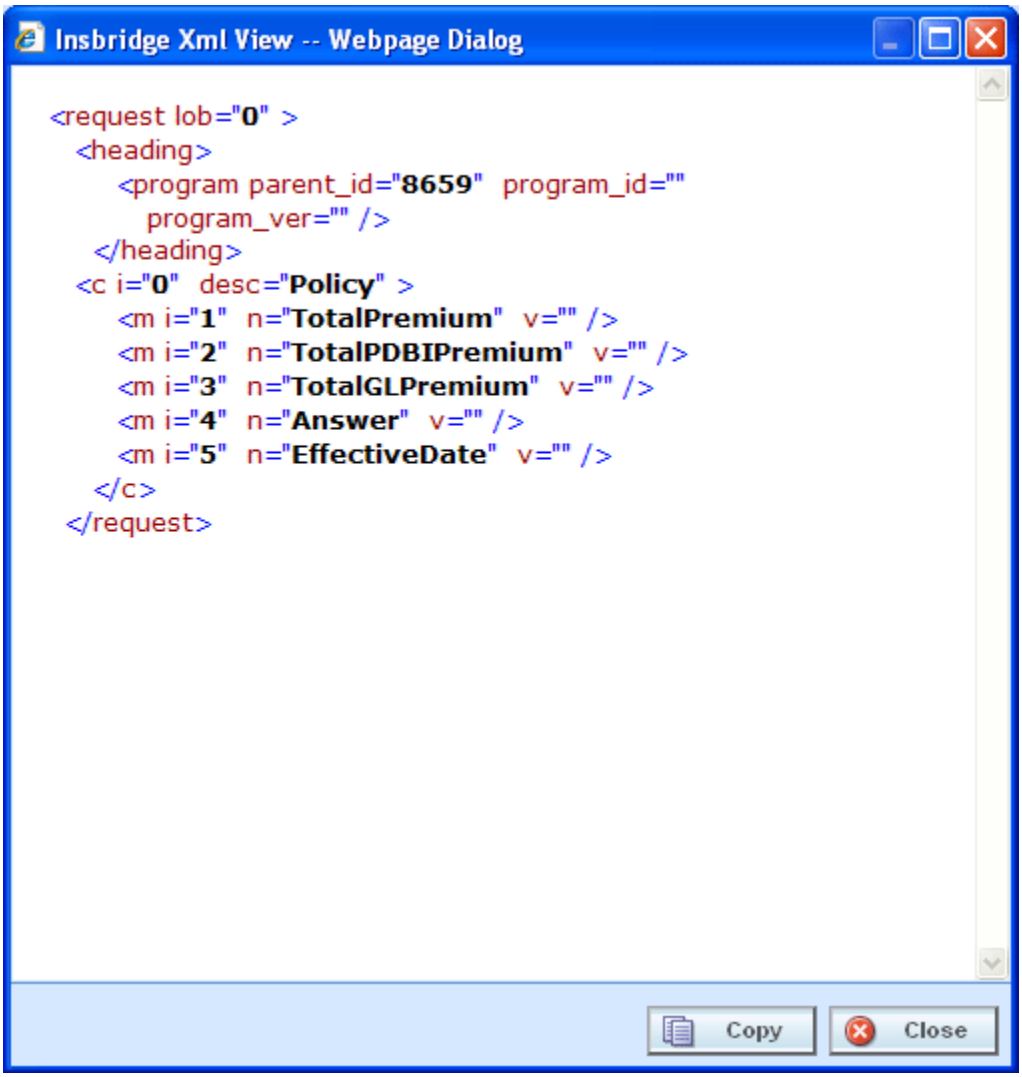


Figure 357 MultiLines Inputs XML

5. Click **Close** to close the popup when you are finished.

MULTILINES

A MultiLines program is a type of program that allows you to call multiple programs from different lines of business together under one MultiLines program. Results would be inclusive of multiple inputs. For example, if your auto program called for six drivers, the MultiLines would get results back to for six drivers. Unique data would be passed each time.

You can pull together an auto program, a home program and a life program and run them sequentially to return with one rate. The results from the first program can be fed into the next program and then those results can be fed into the next. This would allow you to create rates that are bundled together.

The MultiLines screens allow you to:

- Create, edit, copy and delete MultiLines.
- Select the programs to be used in MultiLines.
- Create, edit, copy and delete the result groups that are used in the MultiLines.
- Package the MultiLines and all of its dependant programs for deployment.
- View MultiLines inputs XML.

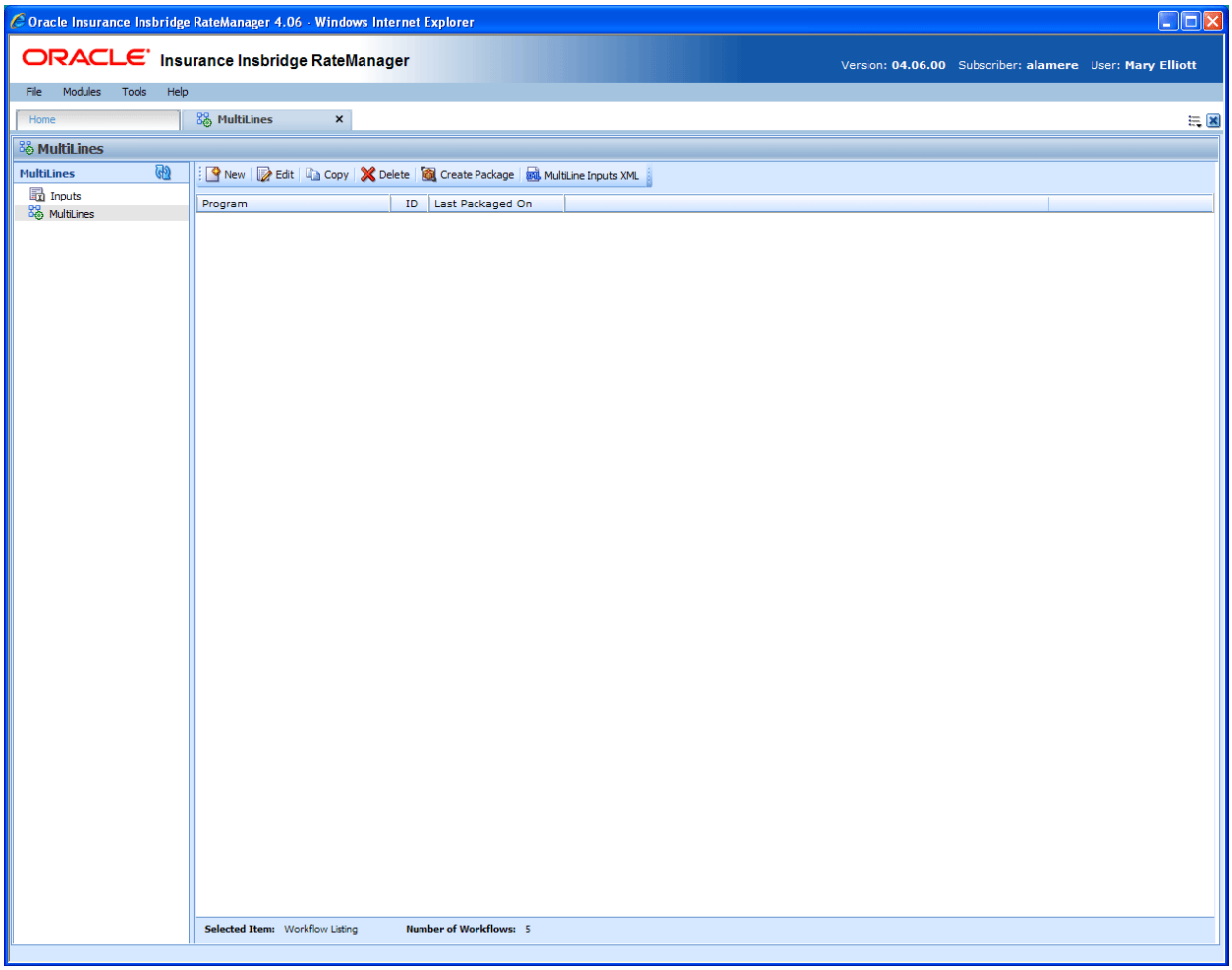


Figure 358 MultiLines

FUNCTIONALITY

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

New	**New:** Creates a new MultiLines.
Edit	**Edit:** Allows for editing of a MultiLines
Copy	**Copy:** Copies a MultiLines
Delete	**Delete:** Deletes the currently selected MultiLines.
Create Package	**Create Package:** Packages the programs for rating and testing. See Introduction to Packaging for more information.
MultiLines Inputs XML	**MultiLines Inputs XML:** Shows a listing of inputs used by the selected MultiLines

FIELDS

A list of all MultiLines programs, sorted alphabetically.

Program: Name of the MultiLines.

ID: The XML ID that is used to call the program. This number is automatically generated and cannot be changed.

Last Packaged On: The date and time the last local package was created for the version.

Creating a MultiLines Program

New MultiLines programs can be created at any time.

1. Click **New**.

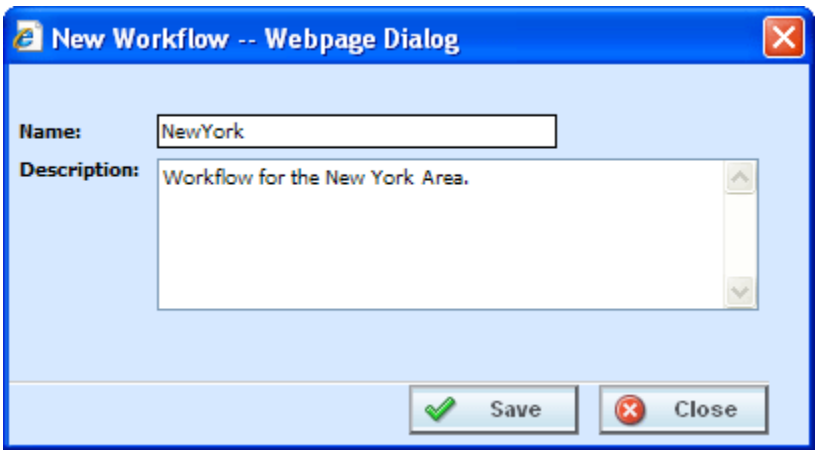


Figure 359 Creating a New MultiLines

2. Enter the **MultiLines Name** and **Description**. The description can be up to 100 alpha numeric characters. No special characters are allowed.
3. Click **Save** to save your work.

Editing a MultiLines

Editing is performed on the same screen and any information can be changed at any time.

1. Select the MultiLines you want to change and click **Edit**. The Edit MultiLines screen is shown.
2. Make your changes.

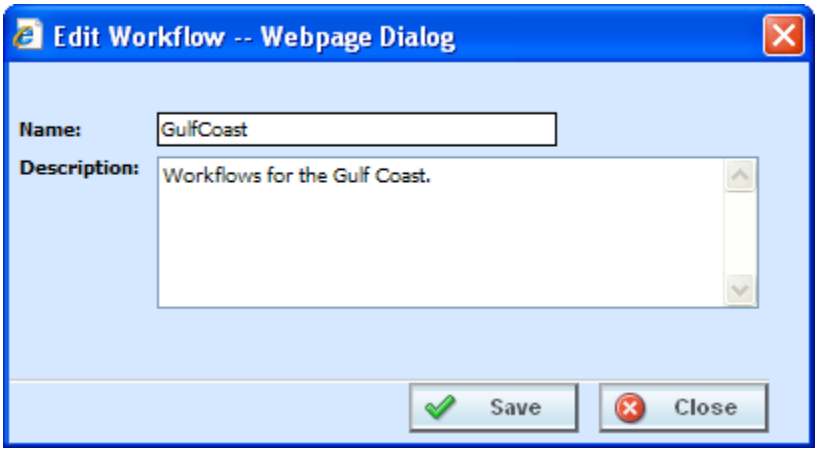


Figure 360 Editing a MultiLines

3. Click **Save** to save your work and close the screen.

Copying a MultiLines

Any MultiLines can be copied at any time.

1. Select the MultiLines you want to copy and select **Copy** from the top bar menu.

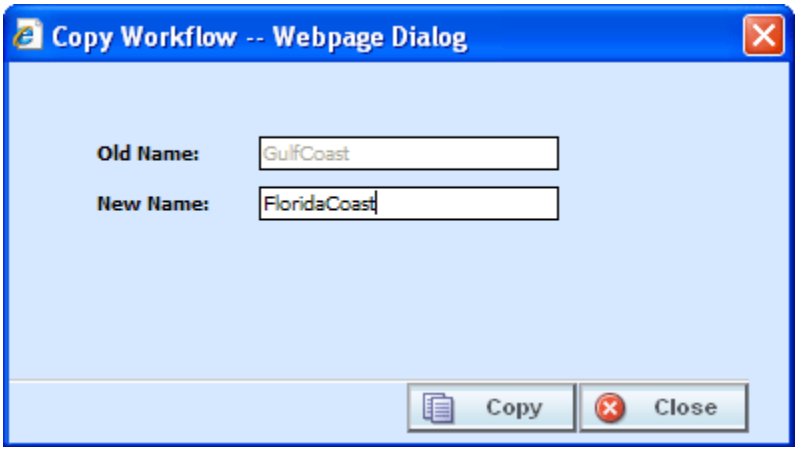


Figure 361 Copying a MultiLines

2. Enter the **New Name**.
3. Click **Copy**. Your MultiLines is listed on the MultiLines listing.

Deleting a MultiLines

Deleting a MultiLines will delete all associated data. There are no restrictions when deleting a MultiLines. Make sure this is what you want to do. Deleted MultiLines cannot be restored.

1. To delete a MultiLines, select the MultiLines you want to remove.
2. Click **DELETE**. A warning message is shown.

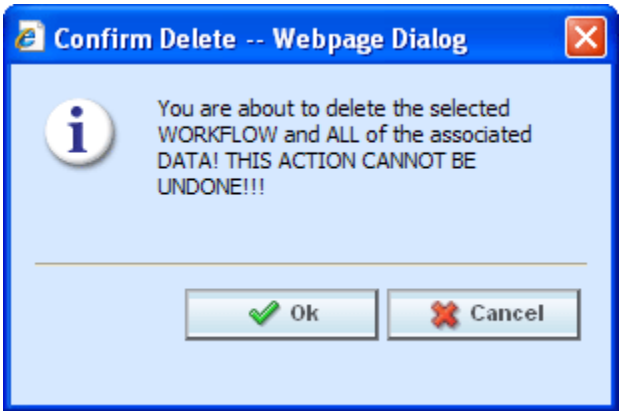
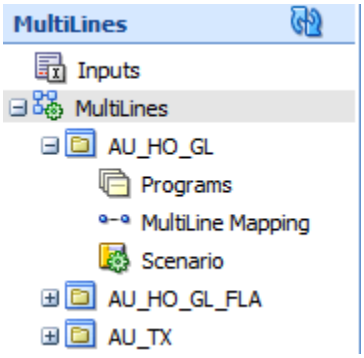


Figure 362 Deleting a MultiLines

1. Click **OK** to delete or **Cancel** to cancel out of the delete.

Programs

The Program screen allows program versions to be added or removed from MultiLines. Program versions can be user created or template generated, however you must select a program version. Entire programs are not allowed. Program versions can only be added or removed. If you need to edit a program version prior to adding it to a MultiLines, you must return to the subline where it was created.



Navigating to Programs

1. From the Modules menu, select **MultiLines**. Select the MultiLines where you want to add a program. Select **Programs**.

2. This opens the **Programs** screen.

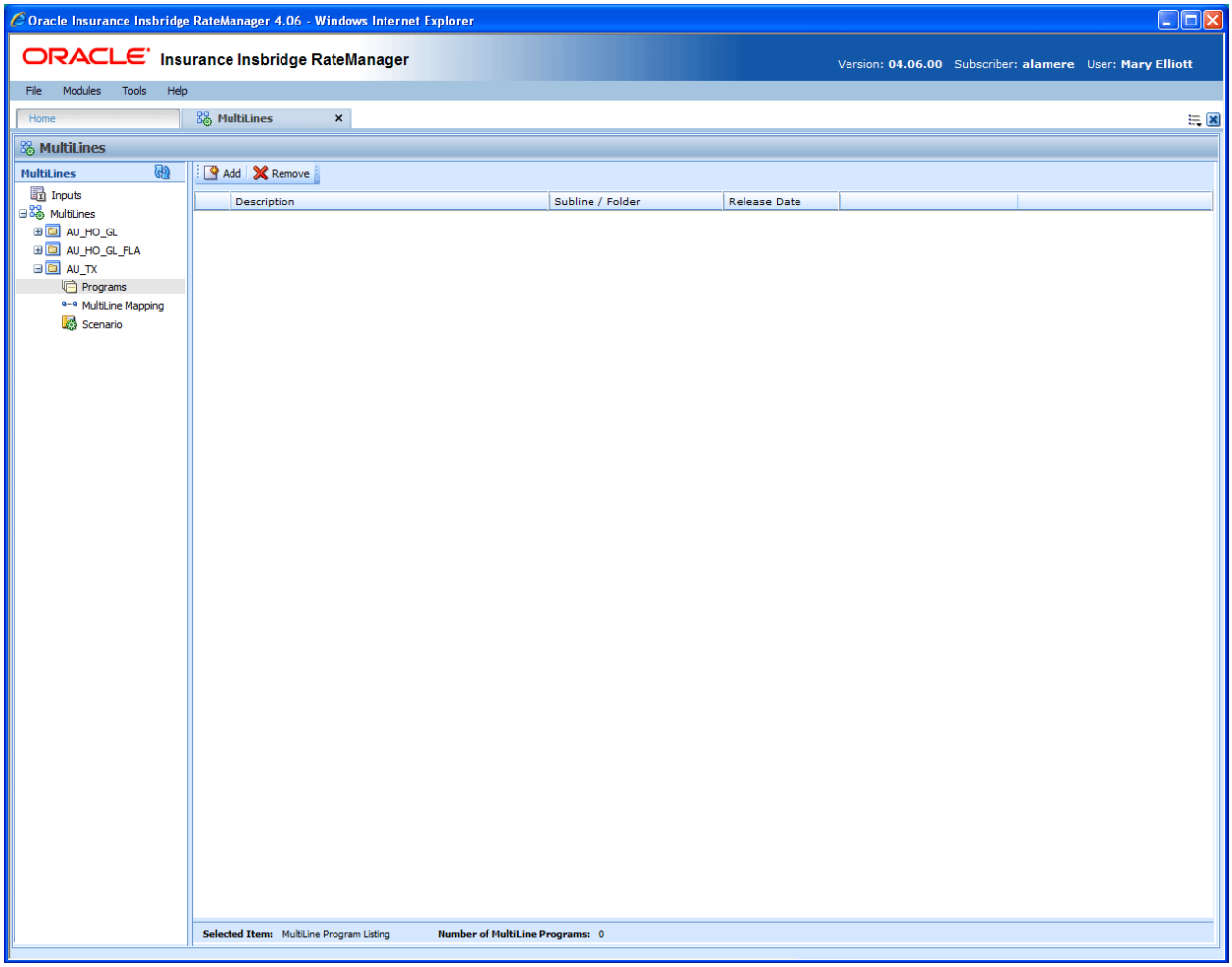


Figure 363 MultiLines Programs

Navigation Bar

Add: Adds a program version to the MultiLines.

Remove: Removes a program version from the MultiLines.

Program Details Listing

All programs in this MultiLines, sorted alphabetically, are listed.

Description: Name of the program.

Subline/Folder: The subline and folder name of where this program can be found.

Release Date: The last date of the release.

Adding Programs

Program versions can be added at any time. You can add multiple versions from the same program. There is no limit to the number of program versions that can be included.

NOTE: *Program versions with callouts can be added to a MultiLines. However, be aware that a program cannot make a callout back to the initiating program. This is circular logic and will result in an error.*

1. Click **ADD** to bring up the Add/Remove Program popup.
2. Expand the subline that holds the program version you want to add.
3. Expand the folder(s) that has the program version you want.
4. Expand the program that has the version you want to add.
5. Check the appropriate version.
6. Select as many program versions as you need. When you are finished click **Save** to save your work.

Removing Program/Program Versions

When you remove a program, you can remove either the entire program or just a program version. If you remove the entire program, you are removing all versions.

1. To remove a program, highlight the program.
2. Click **Remove** or right click and select remove.
3. A warning message will be displayed.
4. Click **OK** to remove the program or **Cancel** to cancel the action.

Program Version

1. To remove a program version, highlight the program that contains the version you want to remove.
2. Right click. Select **Toggle Program Versions**. The available versions are listed below.
3. Select the version you want to remove and click **Remove** or right click and select remove.
4. A warning message will be displayed. Click **OK** to remove the version. Click **Cancel** to cancel the action.

Right Click Menu

Program versions have two options available on the right click menu.

- **Remove:** Removes the version from the program.
- **Program Inputs XML:** Shows a listing of inputs used by the selected program version. See Program Inputs XML.

MultiLines Mapping

The MultiLines Mapping screen allows for the mapping of program results in a MultiLines program. The mappings are MultiLines specific. The MultiLines Mapping screen allows you to:

- Create, edit, copy and delete a result group.
- Map source program results to inputs.

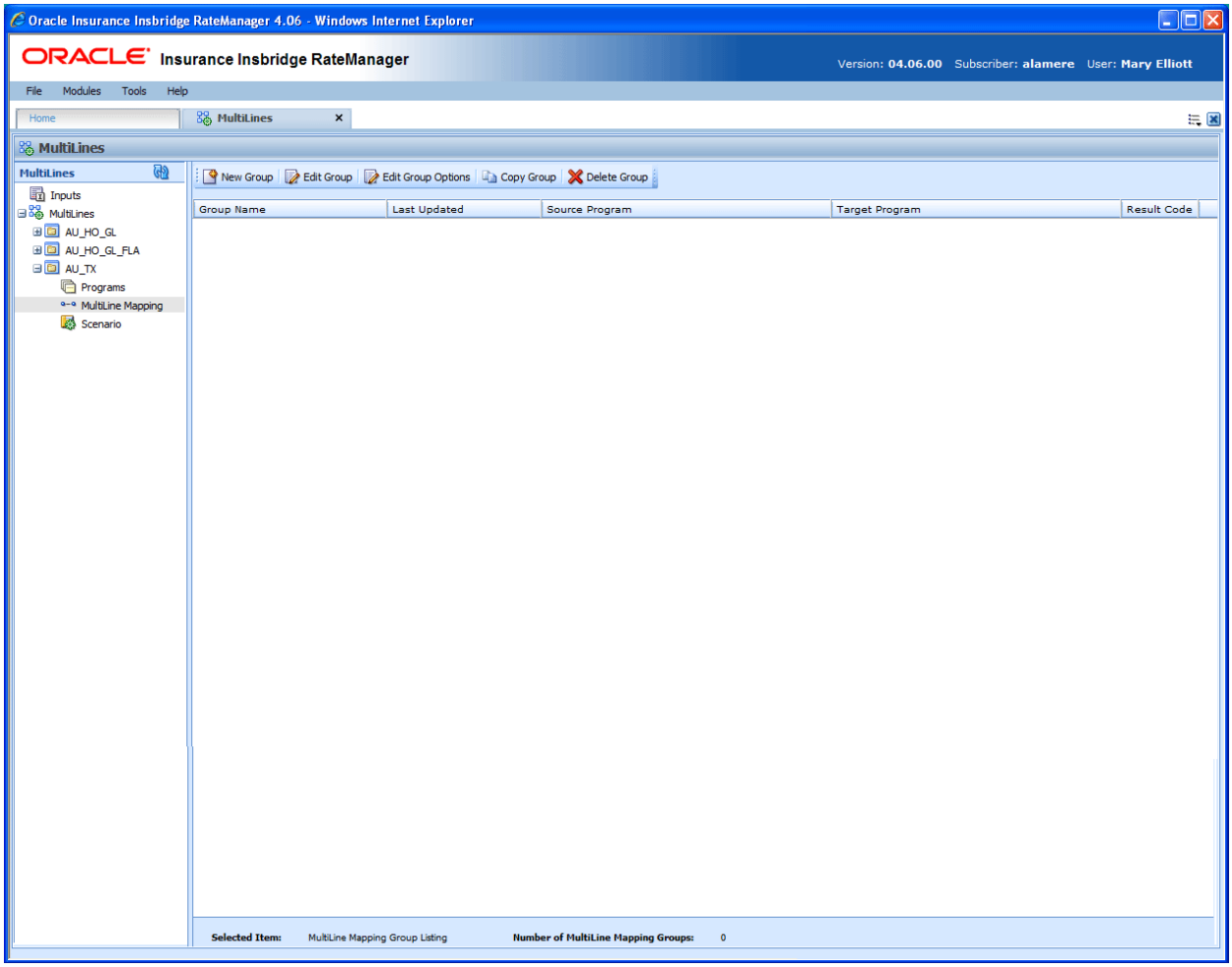


Figure 364 MultiLines Mapping

NOTE: *Programs must be packaged before you can edit the group.*

Navigating to MultiLines Mapping

1. From the Modules menu, select **MultiLines**. Select the MultiLines where you want to add a MultiLines mapping. Select **MultiLines Mapping**.
2. This opens the **MultiLines Mapping** screen.

Navigation Bar

New Group: Creates a new group.

Edit Group Options: Allows you to edit a group.

Copy Group: Creates a copy of the selected group.

Delete: Deletes the selected group.

MultiLines Mapping Listing

All groups in this MultiLines, sorted alphabetically, will be listed.

Group Name: Name of the group. This is the only field open for editing.

Last Updated: The date and time of the last update for this group.

Source Program: The program that is the source of the group.

Target Program: The program that is the receiver of the group.

Result Code: The result code of the group.

Adding a New Results Group

Results Groups can be added at any time. There is no limit to the number of groups.
To enter a new results group:

1. Click **New Group** to bring up the New MultiLines Result Group popup.
2. Enter in a Name.
3. Select the Source Program from the drop down menu. This is the program that will contribute the inputs.
4. Select the Target Program from the drop down menu. This is the program the will receive the inputs.

NOTE: *The Source program and the Target program must be different. If the Source program or the Target program that you want is not listed, please return to the Programs area of MultiLines to select them.*

5. When you are finished click **Save** to save your work.

Editing Result Group Options

Editing is performed on the same screen as entering a new result group. Only the name can be changed. If you need to change the source or target programs, you must delete the result group and re-enter using the correct information.

1. To edit a result group, select the group you want to change and click **Edit Group Options**. The Edit MultiLines Result Group popup will be displayed. You also can right click and select Edit Group Options from the menu.
2. Make your changes.
3. Click **Save** to save your work and close the popup.

Editing Result Groups in MultiLines Mapping

To edit the mappings of a result group, select the group and click the Edit Group tab.

NOTE: *If the screen is blank when you go to edit, it is because the programs have not been packaged. Programs must be packaged before you can edit the group.*

Navigation Bar

Result Groups Tab: Used to go back to the Result Groups Listing screen.

Save Mapping: Saves the mapping for the result group.

Delete: Removes the selected criteria from the mapping.

Results Listing

Show Results For: Allows you to filter the type of input variable shown.

Group Information

Source Program Results: Results for the source program will be listed here. Results will vary according the Show Results for selection.

Description: A description of the source program results.

Data Type: Type of data associated with the source program result. Options are:
- **Decimal**
- **String**
- **Integer**
- **Date**

Type: The type of result. Types include input, result calculated and table.

Input Description: Select the input from the drop down menu or click **BROWSE** to select the input you want.

Input Category: Displays the category.

Editing a Group

1. Select the category from the drop down menu or you can browse for the category you want by clicking **BROWSE**. This will bring up the Browse Category popup.

   From here you can navigate to the Category you want. Once you have selected the category, click OK. The category will auto fill in the show results for section.

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

2. After you have selected a category, the Source program Results will be populated. Click on the result you want to map. The details will be displayed in the description area to the right.

3. Select the Input description from the drop down menu or click **BROWSE** to select the information you need.

4. You can select as many or as few inputs as you want.

5. Before changing categories, click **SAVE MAPPING** to save your work.

6. After you have finished entering in the inputs, click Save Mapping and exit the screen.

Copying a Result Group

Copies can be made of any result group at any time. Use this feature when you want to keep the same target and source programs but require different result mappings.

1. To copy a MultiLines, select the result group you want to copy and click **Copy Group**. The Copy MultiLines Result Group Box is shown.

2. Enter the new name.

3. Click **Copy** to save your work and close the popup.

Deleting a Result Group

A result group can be deleted at any time. When you delete a result group, you are deleting all associated mappings. There are no restrictions when deleting a result group. Be sure when you delete, this is a permanent removal.

1. To delete a result group, select the group you want to remove.

2. Click **Delete**. A warning message is shown.

3. Click **Yes** to delete or **No** to cancel out of the delete.

SCENARIO

The Scenario screen allows users to specify and maintain the MultiLines steps and rules.

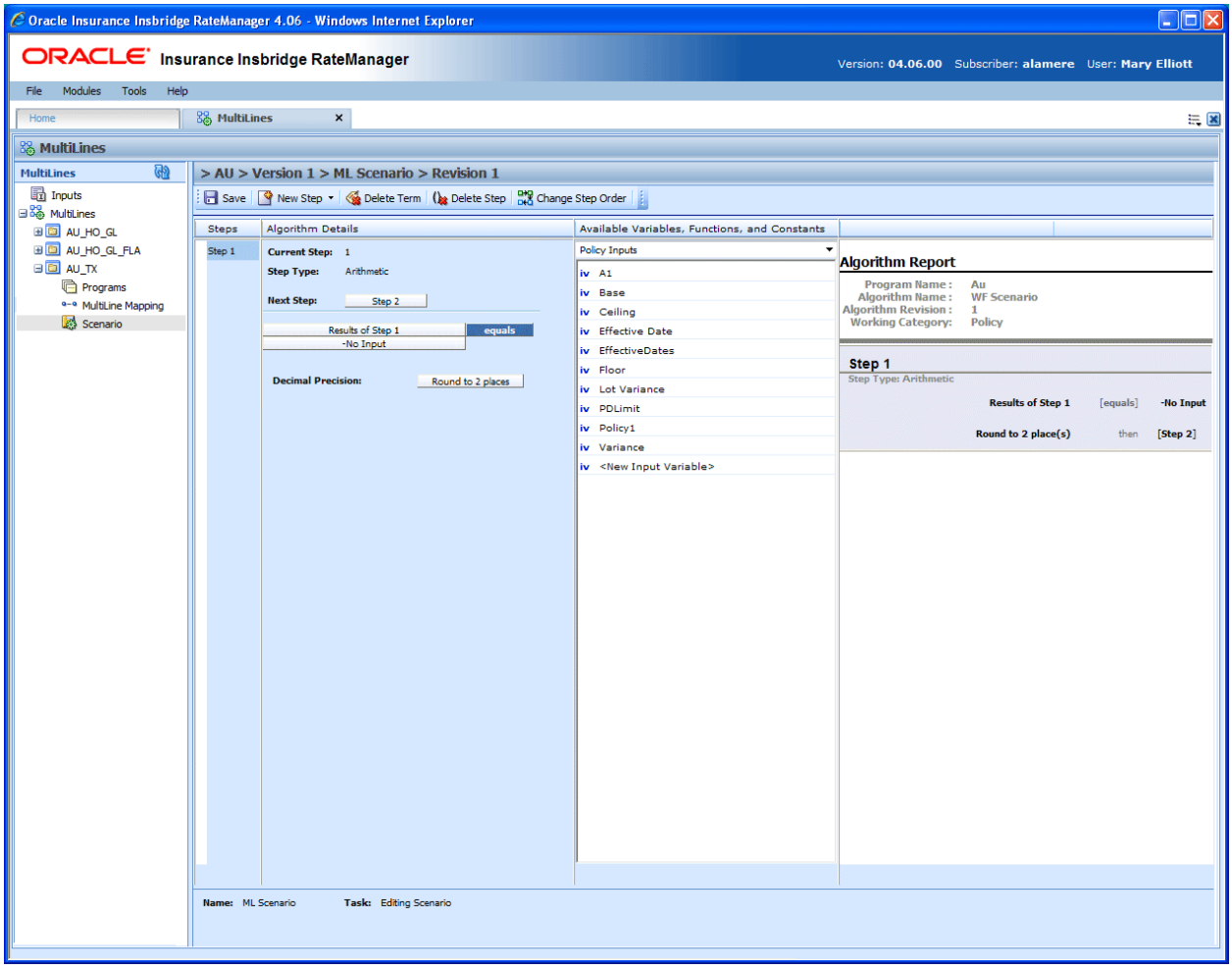


Figure 365 MultiLines Scenario

Navigating to Scenario

1. From the Modules menu, select **MultiLines**. Select the MultiLines where you want to add a scenario. Select **Scenario**.

2. This will open the **Scenarios** screen.

Navigation Bar

Save: Saves the current scenario.

New Step: Creates a new step in the algorithm. For more information, see Step Types.

Delete Term: Deletes the currently selected term from a step in an algorithm.

Delete Step: Deletes the currently selected step. You cannot delete the last step in an algorithm.

Change Step Order: Allows users to change the order of the steps without using the drop and drag feature.

Create Package: Packages the selected program version for rating and testing. See Packaging for more information.

Scenario Details

Steps: Sequential order of steps created with drag-and-drop capabilities for moving a selected step up or down in the sequence.

Algorithm Details: Shows the selected step number, step type selected, next step to follow and inputs/variables used for calculation. Rounding is set via a drop down listing by clicking on the text box next to **Decimal Precision**. You can select a decimal precision from 0 to 5 digits.

Available Variables, Functions and Constants Selection Box: Drop down selection of available inputs, variables, constants and functions sorted by category.

Editing a Scenario

To edit a scenario, click on the step type. The algorithm details are shown. See Editing an Algorithm for more information.

Chapter 29

LIBRARY

The Library tab is a central repository within RateManager where import/export and template programs, along with custom XML files are stored and managed. The import/export option allows for user created programs to be moved in and out of the system. The template option allows for programs created outside of the subscriber to be moved in and out of the system. The custom XML files storage option allows users to park custom XML mapping files that can be used by any program that uses custom mappings.

The Library tab is available from the Modules menu or from the Library snap in the Control Panel on your Home tab. The Library tab is open to all users for viewing. To perform tasks, you must have permissions. If you do not have permissions, please contact your system administrator.

To begin, select the option of where you want to work from the View menu.

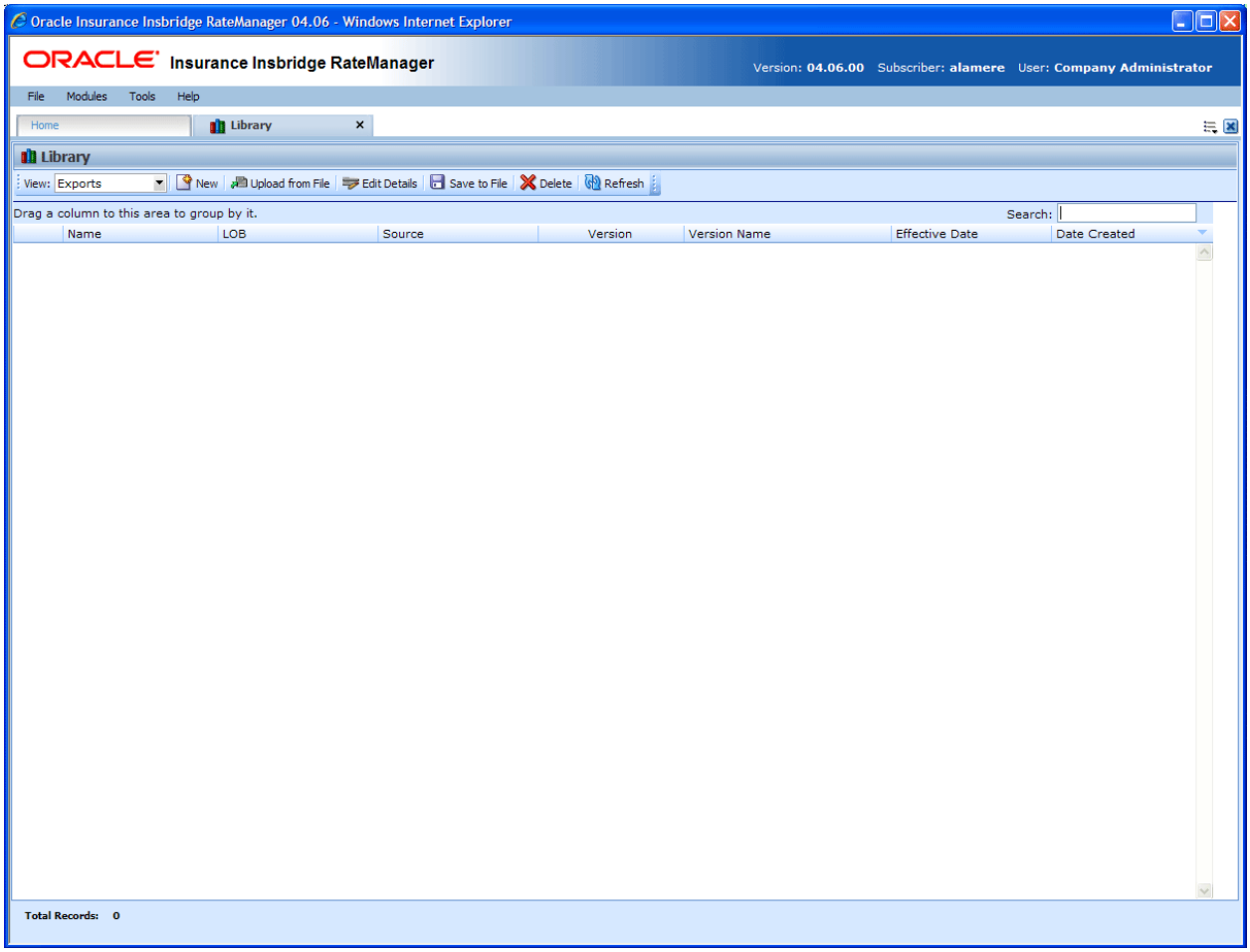


Figure 366 Library

From the Library tab you can:

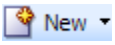
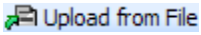
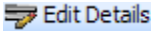
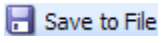
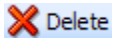
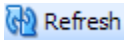
- Create a new template or import program
- Edit a template or import program or a custom XML file

- Save a template or import program or a custom XML file to your local hard drive
- Upload a template or import program or a custom XML file from your local hard drive
- Delete a template or import program or custom XML file
- Apply a template or import program

FUNCTIONALITY

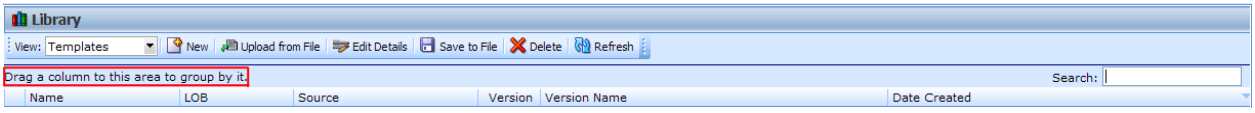
The top bar menu contains the functions you can perform on this tab. The functions change depending on what option you select.

Functions:

	View: Select the option you want to view.
	**New:** Begins the process of creating a new export program or template. This option is not available on Custom XML.
	**Upload from File:** Allows you to download an export program or template into the library from your local drive or network.
	**Edit Detail:** Allows you to edit the export program or template name and version.
	**Save to File:** Saves a copy of the export program or template to your local drive or network.
	**Delete:** Deletes the selected export program, template or Custom XML file.
	**Refresh:** Refreshes the screen. You may need to use this when creating new exported programs or templates.
	Search: A searching option is located on the far right side of the top bar menu.

Drag Column to Group:

At the top of the screen is a sorting option that allows you to drag a column to sort by.



FIELDS

There are six fields for Exports and Templates.

Name: The name of the program template.

LOB: The Line of Business for the program template.

Source: The name of the subscriber who created the program template.

Version: The version of the program the template was created from.

Version Name: The optional name of the program version where the template was created.

Date Created: The date the program template was created.

Custom XML has four fields.

Name: The XML name of the file.

Scope: What this file is to be used for, inputs, outputs or both.

Available: Where this template will be available, Input Mapping, Output Mapping or both.

Date Last Modified: The date the file was added to the Library.

Right Click Menus

Your default subline will have different right click menu options than non-default sublines.

Non-Default Subline will have four options:

- **Apply**: Applies new templates to a new program folders/subline or applies updated templates to existing program folders/sublines.
- **Edit Details**: For non-default sublines, you will only be able to view the template name and version. No changes will be allowed.
- **Save to File**: Saves the file to your local hard drive or network.
- **Delete**: Removes the template from the Library.

Default Subline will have three options:

- **Edit Details**: Allows for the template name and version number to be updated.
- **Save to File**: Saves the file to your local hard drive or network.
- **Delete**: Removes the template from the Library. This will not remove the program from the system.

Sublines and Templates

Lines are separated into *sublines*. Sublines are classifications that fall in between lines and program folders. Sublines allow you to distinguish program sources and also keeps the globals unique within that subline. Globals are subline specific and are not shared across sublines. There are two types of sublines, default and template generated.

- Indicates the **Default** subline

- Indicates **Template** generated sublines

There is one default subline. This is the subline created for your subscriber ID. Programs in your default subline can be exported or turned into templates. Default subline exports and templates can be saved to your local hard drive or network and then applied back into your own RateManager system or shared with other subscribers in their RateManager systems.

Working with New Sublines and New Templates

Template generated sublines are created when you apply a template or import a program that was created outside of your subscriber ID. Templates with different subscribers will each create a subline when applied. For example, if you apply a template from subscriber Alamere, you will create a subline Alamere. If you apply another template from subscriber Insurco, you will create another subline Insurco. You can have many template generated sublines.

The first time a template is applied under a line of business two items will be created automatically, the subline and a Programs folder. The subline will be placed under the line of business, named the same as the Source that created the template. Directly underneath this subline will be a folder called Programs. For example, if you bring in a general liability template created by Content Services, it will be placed in the general liability line of business, under the subline of Content Services, in the Programs folder.

If the subline and program folder already exist, no additional items will be created.

Source information is taken from the Subscriber ID. It is possible to change the name of the subscriber without changing subscriber ID. If this happens, a new subline will not be created. The template will be populated under the previous subscriber ID name. The new subscriber ID name will not be listed as a subline.

For example, Subscriber ID 461 is originally named Content Services. You have imported templates from Content Services and that created a subline for Content Services in RateManager. Content Services has their name changed to The Template Creation Group. Their subscriber ID has not changed but their name has. In the library, any new templates will now show The Template Creation Group as the source. When you go to import one of these templates, it will be placed in the Content Services subline - the original name. You will not have a new subline created.

IMPORT/EXPORTS

The import/export and template screens look similar and have similar functionality. The main difference is that programs on the import/export screen can be applied to your own subscriber sublines only and template programs can be applied to the creating subscriber subline only. You cannot apply import/export programs to any other subscriber subline and you cannot apply templates to your own subline.

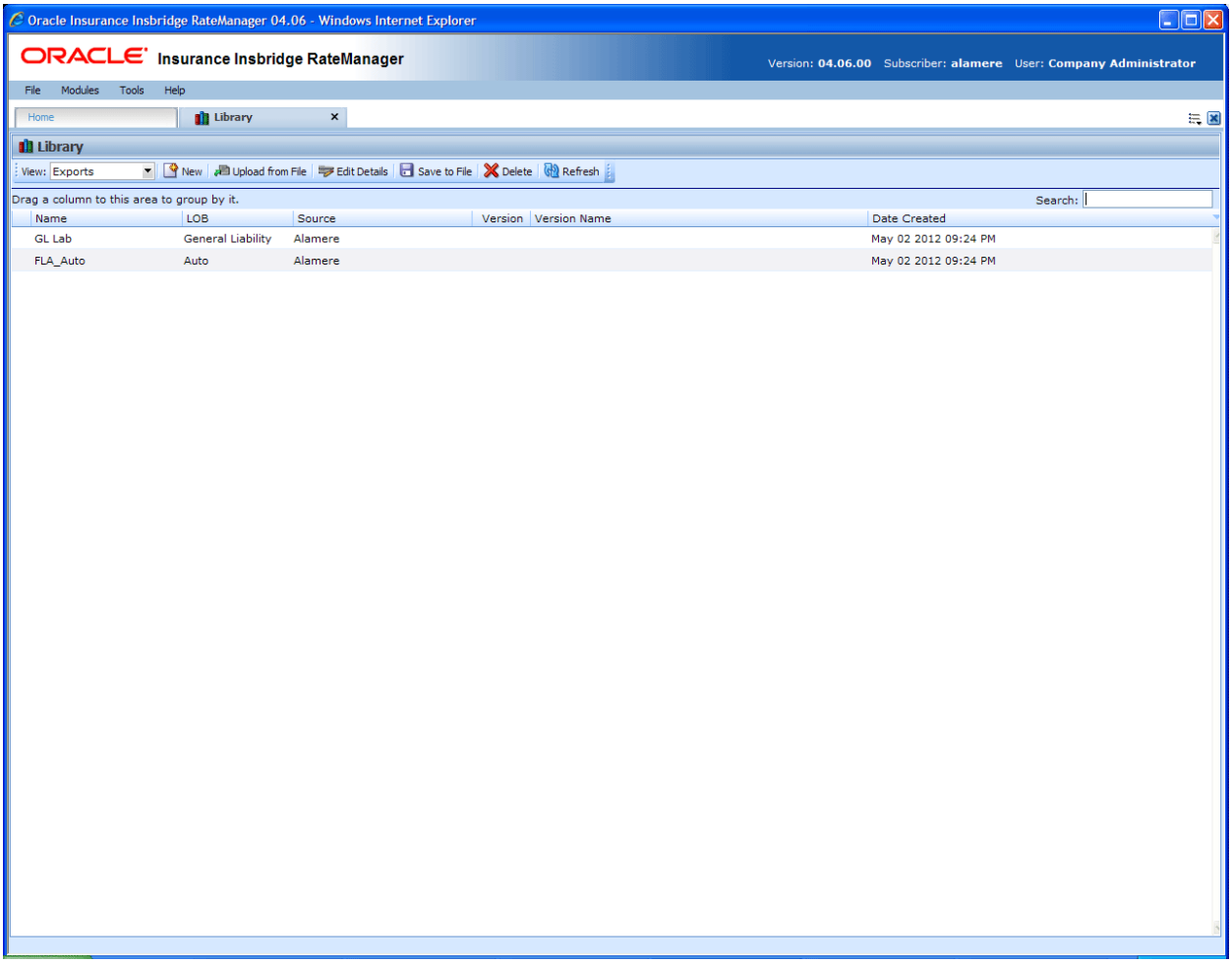


Figure 367 Exports in The Library Tab

RateManager export feature provides users with the ability to export all elements of a program from one database to another database or within the same database. All versions of a program will be exported. Individual versions cannot be exported. The functionality is accomplished through a wizard.

- All elements related to a program will be exported including:
  - Global Input Variables
  - Global Result Variables
  - Local and Global Table Variables
  - Local and Global Calculated Variables
  - Local and Global Algorithms
  - Sequencing
  - Program Versioning
  - Categories

- The export will include all revisions of local variables and algorithms.
- Notes will not be included.

NOTE: *You must have the RateManager Program Admin rights to export a program. If this option is not displayed, you do not have the rights to export. Please contact your system administrator if you need to export a program.*

Insbridge message service needs to be running.

Previous import/export programs are not accepted into the Library tab Exports option.

To Export a Program

1. Select Export for the view. When the screen refreshes, the exported programs currently in the system are shown.

2. Select New. The program selection window is shown.

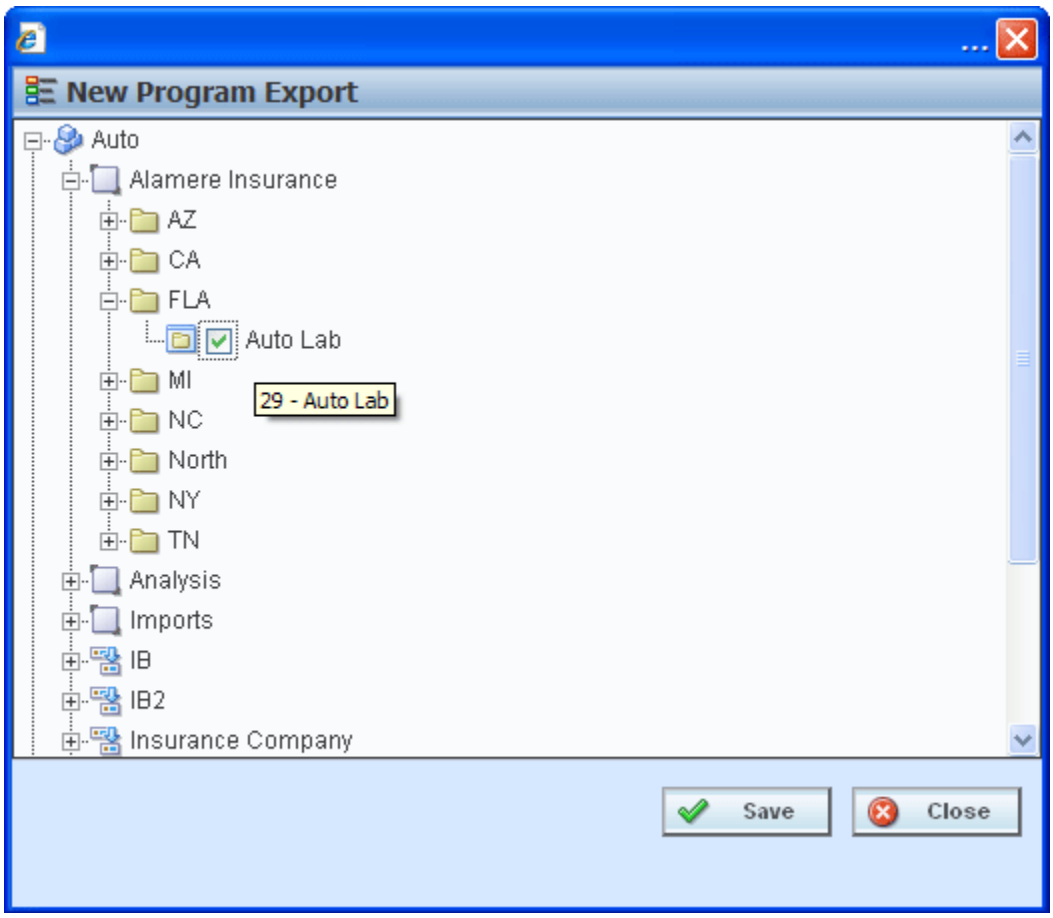


Figure 368 Selecting a program for Export

3. Select the program you want to export.

4. Clcik Create. The program is exported and listed on the Export screen.

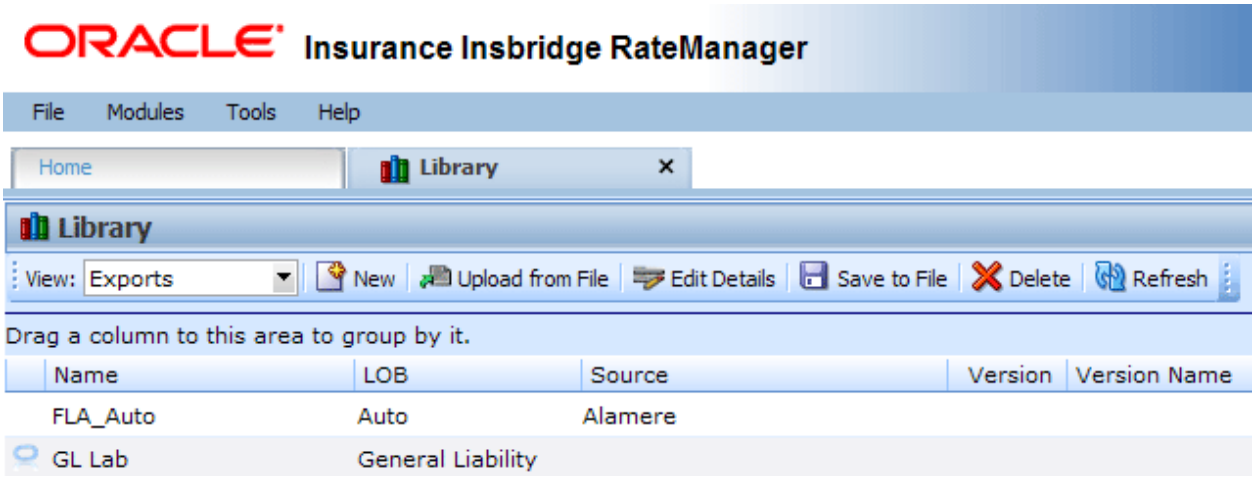


Figure 369 Exported Program

IMPORTS

Programs that have been exported can be imported or applied back into RateManager. The applied program is placed into the same line of business that the program was exported from. The applying of an exported program is the same process for either an export or a template. Pleas see applying templates for more information.

If the exported line is not activated in the importing subscriber's RateManager, the Exported Program Summary will display *No LOB found* for the Line of Business information. You will have to activate or create the line of business before this program can be imported. If you attempt to import a non-activated line, an error message will be displayed. The error message will display the LOB ID number that you need to activate or create.

Import Program can only create a new program, with a new program ID. You will not be able to restore over an existing program for safety reasons. You can delete the incorrect program and import the correct program.

TEMPLATES

Templates are exact copies of existing program versions 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. Templates can serve as base programs that can be customized to suit your needs.

You can create templates that other users will upload into their RateManager environment or you can upload templates created by other users into your RateManager environment. You cannot upload a template that you have created back into your subline. This would cause a conflict and result in an error.

Templates are not tied to the original program that they were created from. This means that if the original program is altered, changes will not be brought into the template. If changes are made to the original program, a second version of the template can be created and brought into the library. The template version of variables and algorithms are locked and cannot be edited or deleted however, new versions of the variables and algorithms can be added.
Templates can be uploaded by users within the group. System administrators may bring in templates created from other user groups within the company or from outside the company.

NOTE: *Library usage depends upon your group rights. If your group has the rights to program import, you will have the right to import templates. If your group has the rights to program export, you will be able to export templates.*

CREATING A NEW TEMPLATE

New templates can be added at any time. There is no limit to the number of templates you can create. You will only be able to create templates out of standard program versions in your default subline. You cannot create a template from a template program or a template generated subline.

1. Navigate to the **Library** tab.
2. Click on **NEW** and select **Program Template**. The New Program Template screen will open, allowing you to select the program version you want.

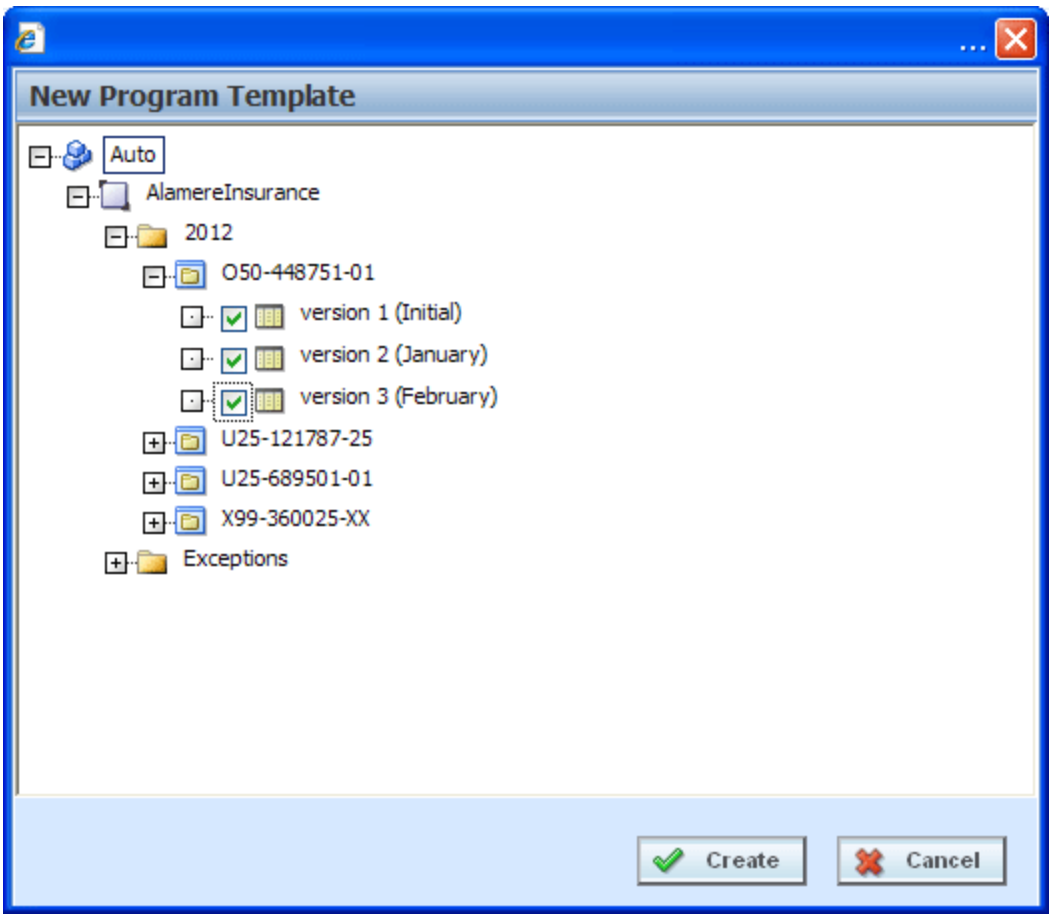


Figure 370 Applying a New Template

3. Select the **Program Version** you want to use as a template and place a check in the box. You must check the box. Highlighting the version or just a program will not create a template.

NOTE: *You can select multiple program versions. Each program version will result in an individual template.*

4. Click **Create**. The popup will close and the screen will refresh. Your templates will be listed.

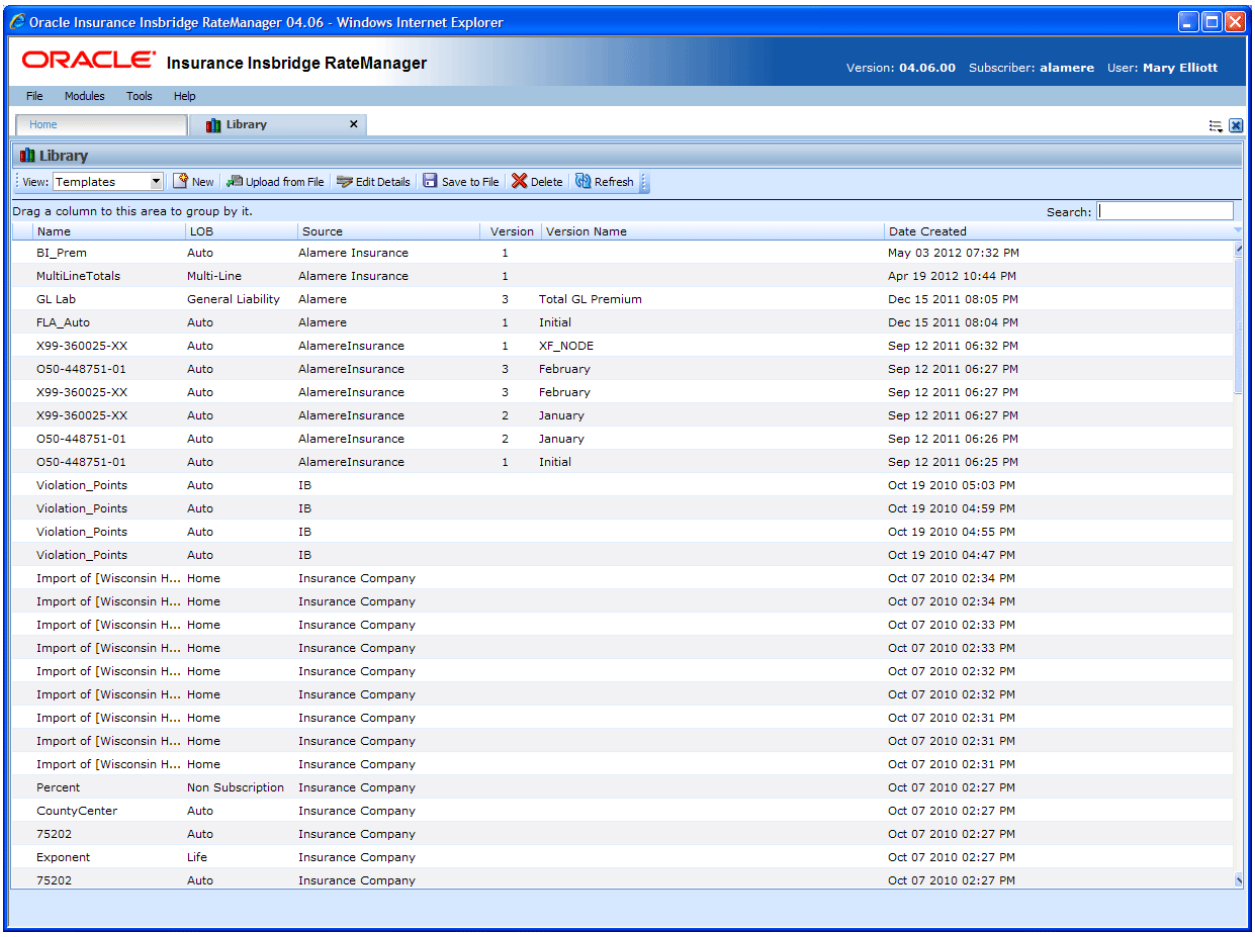


Figure 371 Populated Library

A spinning icon indicates that the creation process is occurring. If the icon continues, please click **REFRESH** to refresh the screen.

NOTE: *Packages are not brought in as part of the program. If a program has been packaged, you will need to package again when applied.*

NOTE: *The Insbridge Message Service must be running. If you receive a message that the Insbridge Message Service is turned off, please contact your system administrator to start the service. Once the service has been started, you will need to refresh the screen to view your templates.*

Editing a Template

Templates that you have created can be edited at any time. Templates brought in from other sources cannot be edited. If SAVE is not on the Edit Template popup, you will not be able to edit the template. Templates must be edited one at a time.

1. Click on the **Template** you want to edit. A green check mark will be placed in the check box at the front of the row.

2. Click **EDIT DETAIL** to open the Edit Template popup.

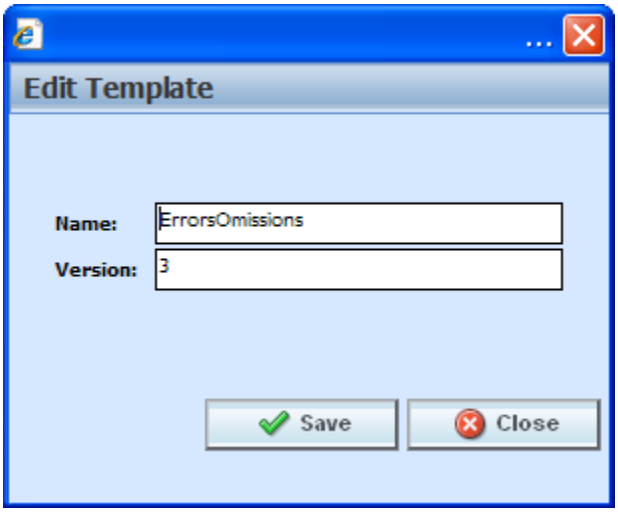


Figure 372 Editing a Template

3. You can change the **Name** and **Version**.

4. When finished, click **Save** to save your entry and close the popup.

Save to File

Save to File allows you to save a template to a local drive or network. Saved templates can then be emailed or shared with other users. Templates must be saved one at a time.

Saving a File

1. Click on the **Template** you want to save. A green check mark will be placed in the check box at the front of the row.

2. Click **SAVE TO FILE**. A separate popup window will be displayed. Select **Save** to save your file. Click **Cancel** if this not the option you want.

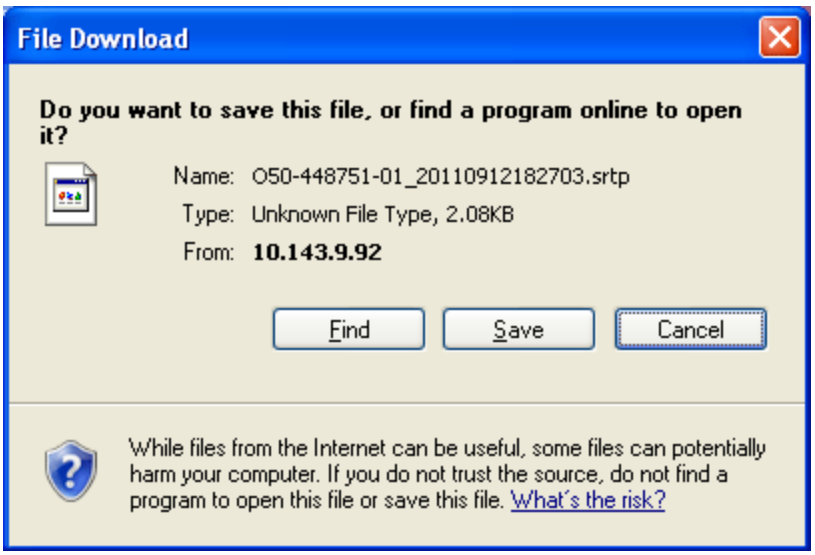


Figure 373 Saving a File

3. Your computers dialogue box will be displayed. Select the location where you want to save the template. Click **Save**.

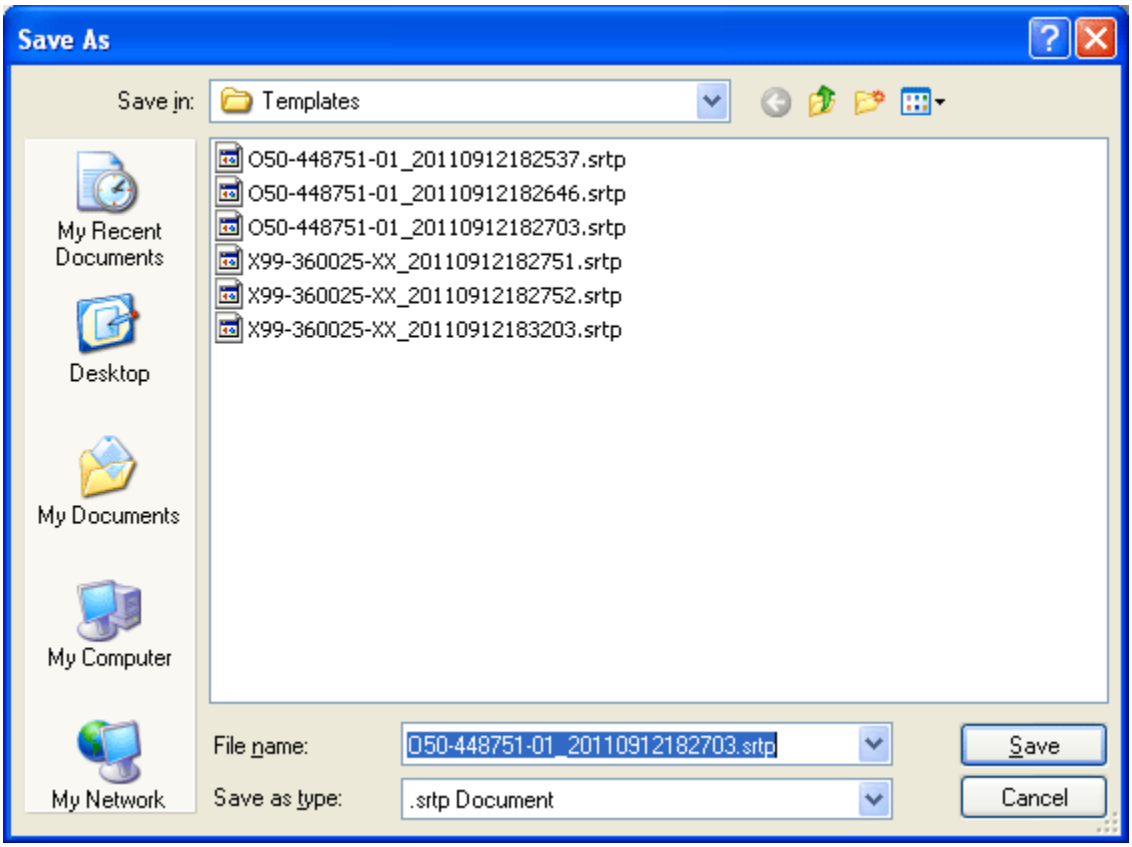


Figure 374 Selecting a Save Location

The name of the template file will be taken from the database, not from the library name. For example, you may have selected the “Dallas” template but when the File Download box is displayed, the Name is displayed as IDN-PUB-SS_bd443d05ba2545a2b22bb1dab781b90d.srtp.

You can change the template file name at the time you are selecting the location to save your template. Highlight the file name and type in the name that you want. This is recommended if you are saving more than one template. It will help you distinguish between templates. Do not change the file extension (.srtp).

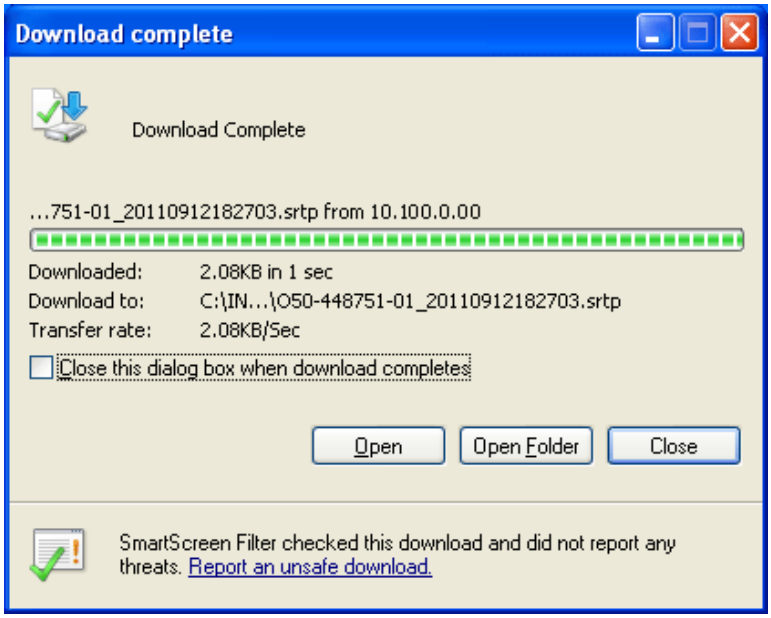


Figure 375 Download Complete

4. When the download is complete you will have the option to Open, Open Folder or Close. Select **Close**. The template file will be on your local drive or network.

NOTE: *On most systems, selecting Open will result in an error message and Open Folder will open your computers explorer window.*

Be aware that when the file is downloaded into another library, the template name will revert back to the original library name.

For example: You have a template in your library called “Dallas” that another user in another group could utilize. You saved this template to your local hard drive as IDN-PUB-SS_bd443d05ba2545a2b22bb1dab781b90d.srtp. You emailed this template file to the other RateManager user in the other group. This other user saves the file to their local hard drive as IDN-PUB-SS_bd443d05ba2545a2b22bb1dab781b90d.srtp. They then download the file to their library. The file will be displayed in their library as “Dallas”, exactly how it was displayed in your library.

OR: You have a template in your library called “Dallas” that another user in another group could utilize. You changed the template file name and saved it to your local hard drive as Dallas-Version3-8-2010.srtp. You emailed this template file to the other RateManager user in the other group. This other user saves the file to their local hard drive as Dallas-Version3-8-2010.srtp. They then download the file to their library. The file will be displayed in their library as “Dallas”, exactly how it was displayed in your library.

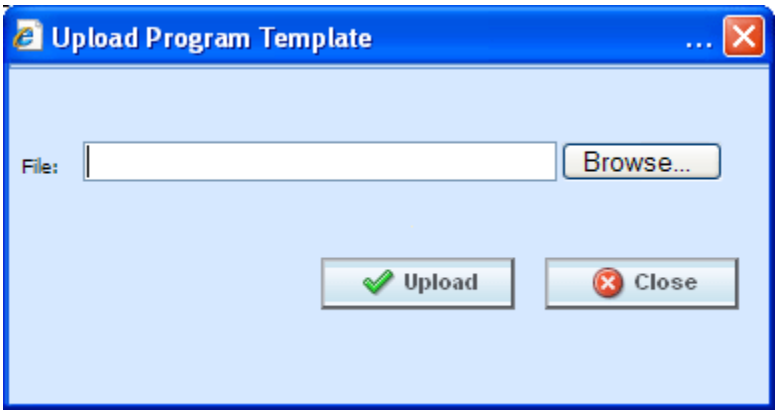
The database generated name or any name you may have given the file will not be displayed. Once the template file is in the library, use EDIT DETAIL to change the name to what you need.

Upload from File

Upload from File allows you to bring a template that you have saved on your local drive or network into the library. Downloaded templates may have been sent to you from other users via email or parked on a shared drive by system administrators or other users. Downloads must be done one at a time.

Downloading a File

1. Click on **Download** and select **From File**. A separate popup window will be displayed.



2. Click **BROWSE…**, this will pull up your computers dialogue box.

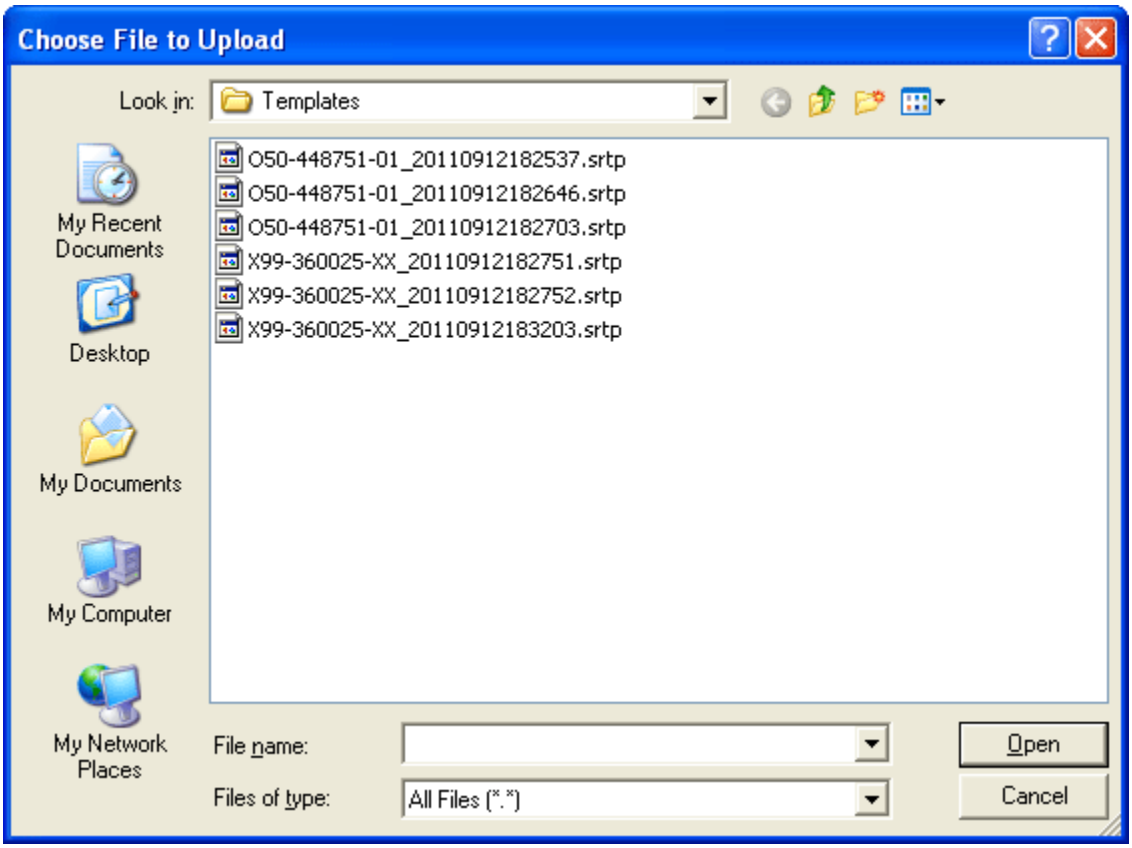


Figure 376 Selecting a Template File to Download

3. Find your file and click **Open**. This will close the dialogue box and return you to the previous popup.

4. Click **Upload** to upload the file into your library. If this is not the action you want to take, click **Close**. The file will be displayed in the library with the original file name.

NOTE: *Only .srtp file extension types will be allowed. Any other file type will not be accepted.*

Be aware, the template file name that you download may not be the same when the template is populated into the library. When a template file is saved to a disk or drive, the name used by the file is from the database, not from the library. The template file name may have been changed by the user when the file was saved. It is not mandatory to change file names but it can be helpful to the user to do so. When the template is downloaded into your library, the name will revert back to the original file name. Please check the date created by to verify your template is in the library. Templates in the Library can only have the Name, Version or Notes information changed by the source of the template.

For more on template file naming, see Saving a File.

Deleting a Template

Templates can be deleted at any time. Deleting a template from the library does not remove the template from the subline. You can select and delete multiple templates.

1. Click on the **Template(s)** you want to delete. A green check mark will be placed in the check box(es) at the front of the row.

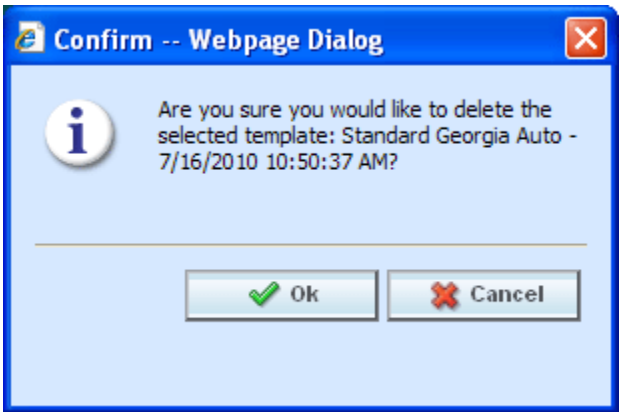


Figure 377 Deleting a Template

2. Click **DELETE**. A separate screen will be displayed. Select **OK** to delete the templates. Click **Cancel** if this not the option you want.

Applying a Template

NOTE: *If your group has the rights to import a program, you will have the right to create templates. Only the system administrator can modify these rights. If you cannot create or edit a template, please contact your system administrator.*

Once a template has been brought into the library, it can be applied. Templates can only be brought in under the line of business they were created in; meaning that a General Liability template cannot be brought in under the Auto line of business. Templates must be applied one at a time.

There are two different methods of applying templates, New Program and Existing Program.

New Program

The new program method will create the subline and the Programs folder. Most often you will use the new program method when the source is new to the line of business or the template is new to the subline. You also can use the new program method when you want to bring a template in under a different name instead of as a new version under an existing template program.

Existing Program

The existing program method will bring a template into an existing subline and program. Use the existing program method when the subline and the program folder are already established. For example, the template Maryland Stats from source IB is in the library. If you do not have an IB subline, you will need to bring it in with the New Program method. When you apply the template to the LOB, the subline IB will be created and the Programs folder will be created. The program Maryland Stats will be placed under the Programs folder as version 1. Any other versions of the template Maryland Stats can be brought in with the Existing Program method.

If you wanted to bring the template Maryland Stats in again under a different name, you could once again use the new program method. You would have to rename the program when you select the Programs folder location. Renaming the program will create a new program. The version will still be placed in the same subline but as version one of a different Program name.

Applying a Template: New Program

1. Click on the **Template** you want to apply. A green check mark will be placed in the check box at the front of the row.

2. Right click to get the menu. Select **Apply→New Program**. A separate window will be displayed.

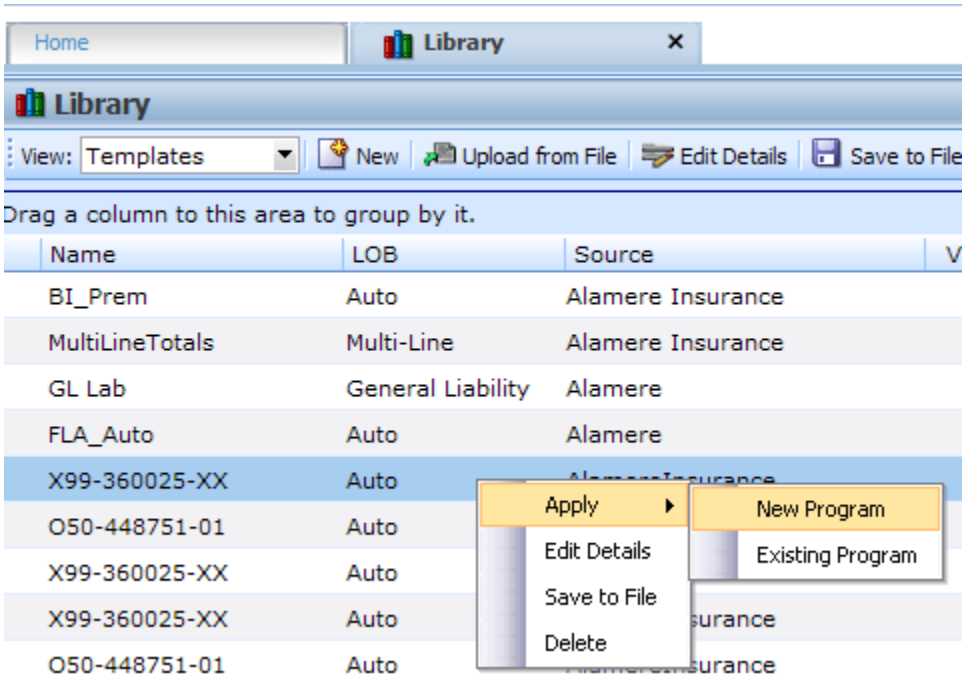


Figure 378 Applying a New Program

3. Select the **Program** folder location from the drop down menu.

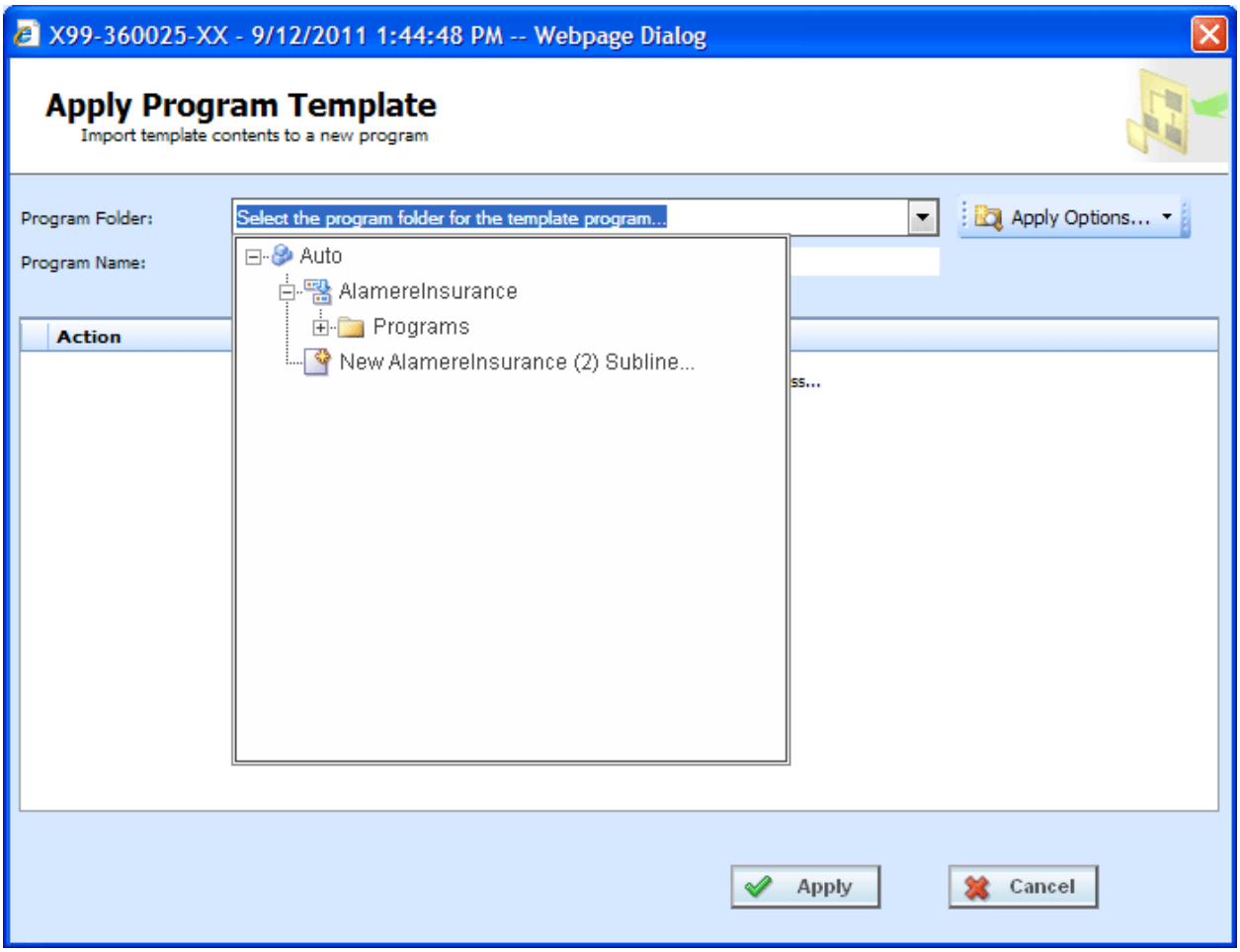


Figure 379 Selecting Program Folder

NOTE: *If this is a new subline, Programs will be the only option. After you apply the template, you can create additional folders but the subline must be established.*

4. If you want to change the name of the template, enter in a **Program Name**.

5. If any lines, subline or folders need to be created, click the apply options. Select the option you want to create. Permissions are needed to create line and sublines.

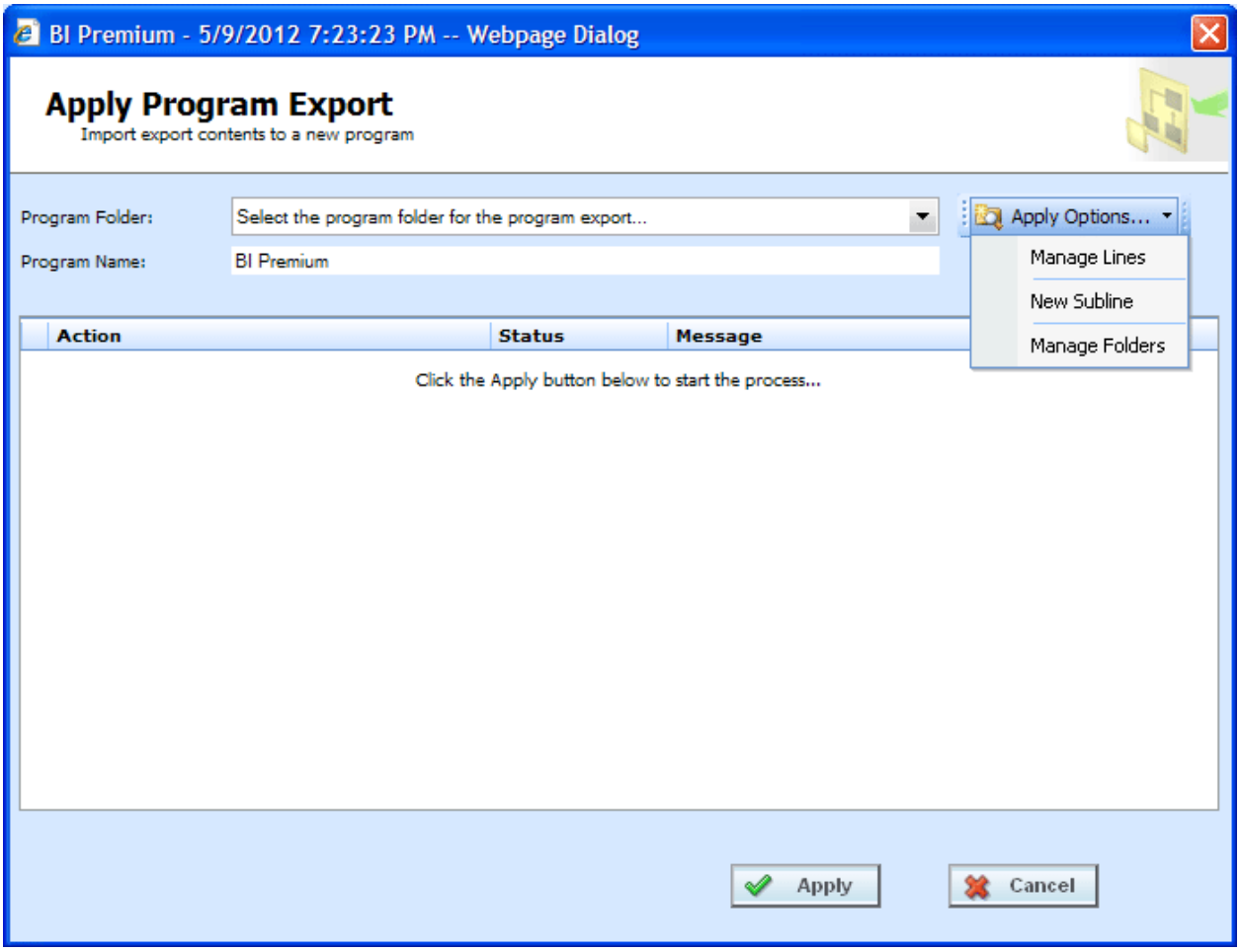


Figure 380 Naming the Template

NOTE: *Be aware, if the subline and programs folder have already been created, that renaming the template may create another program folder and your template may not be recognized as another version in an existing program folder but as a new program folder.*

6. Click **APPLY**. The screen will list the actions taken and success or failure.

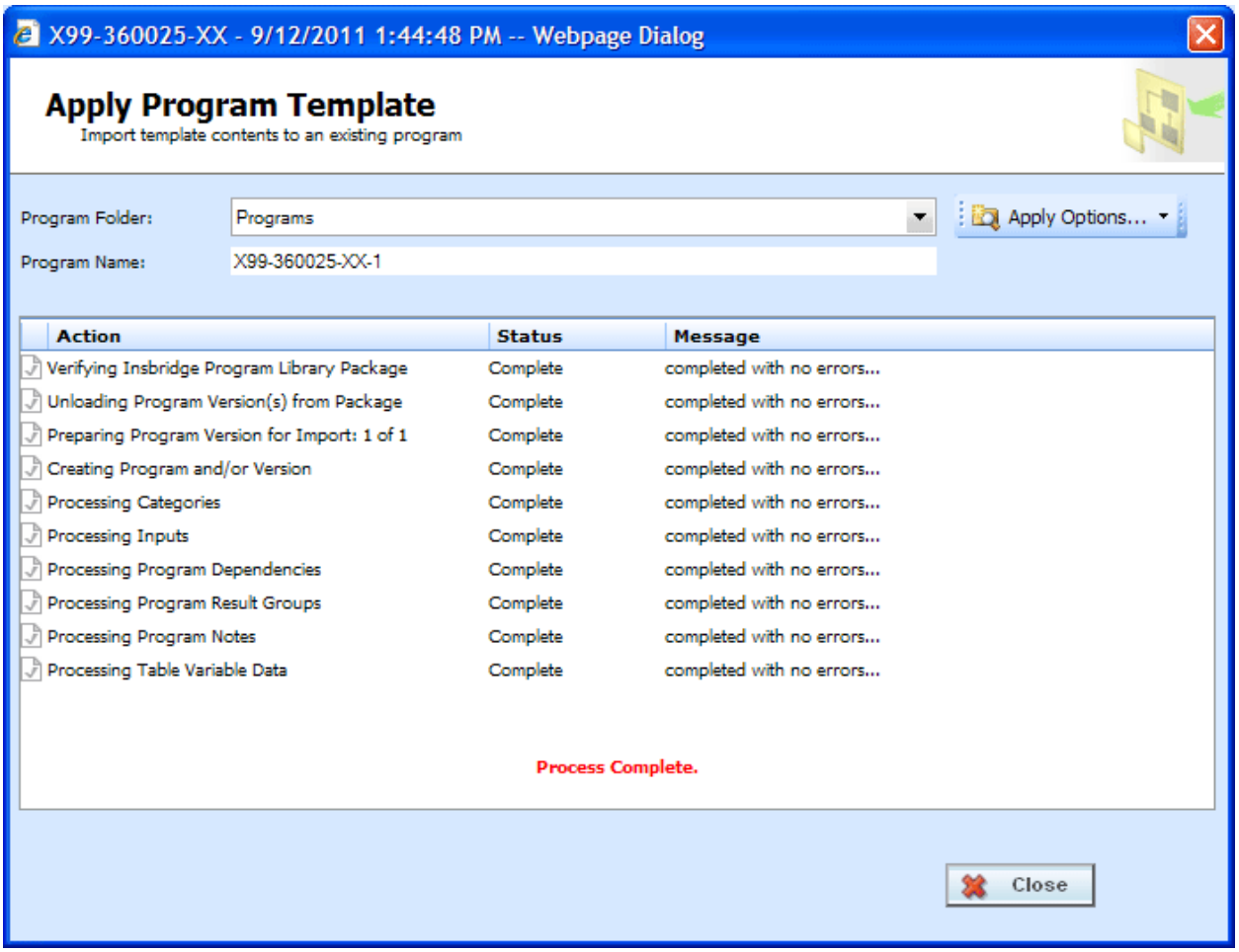


Figure 381 Applied Template

When the template has successfully been applied, a process complete message will be displayed at the bottom of the screen.

If the template is successful, the subline and program folder along with the template will be displayed under the correct line of business.

If the template failed, a failed message will be listed. The Subline and the Program Folder will be created but no template will be listed underneath. If one item fails, the template will not be created. All items must pass.

- A check at the front of the action and **Complete** status indicate **success**.
- An **X** at the front of the action and a **Failed** status indicates a **failed** template application.
- A blank status indicates that this action was not needed.

Applying a Template: Existing Program

Use the Existing Program method when applying a template to an already existing subline and programs folder. This method is most commonly used to applied another version to an existing program. The new template will be placed as the next available version.

NOTE: *If your group has the rights to import a program, you will have the right to apply templates. Only the system administrator can modify these rights. If you cannot create or edit a template, please contact your system administrator.*

1. Click on the **Template** you want to apply. A green check mark will be placed in the check box at the front of the row.

2. Right click to get the menu. Select **Apply→Existing Program**. A separate popup window will be displayed.

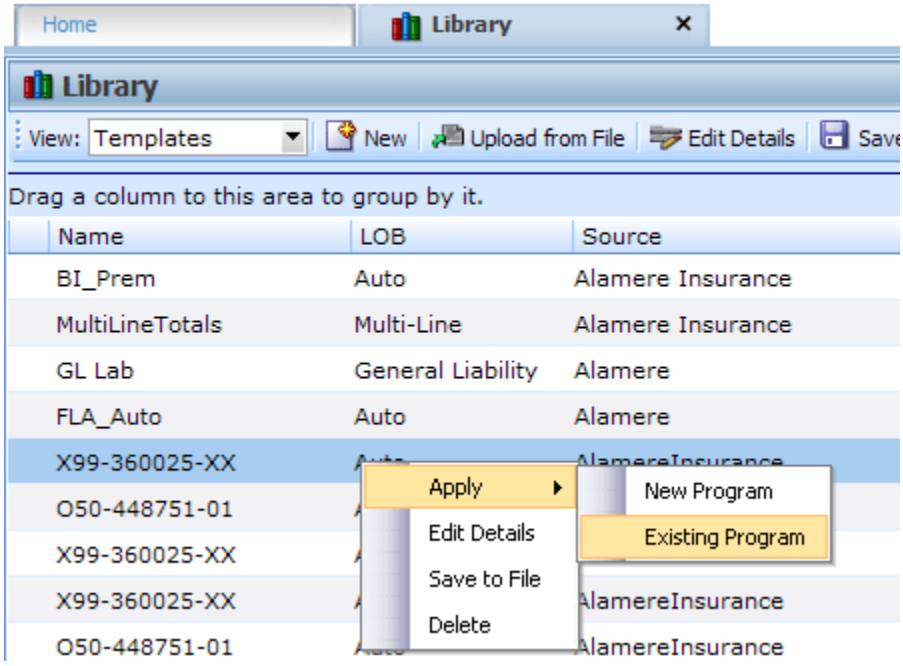


Figure 382 Applying Template to Existing Program

3. Select the **Program Folder** location you want from the drop down menu. Then select the final Program where you want to place the new version.

NOTE: *You will not be able to change the name of the template. If you want to change the name of the template, you must use the New Program method.*

4. Click **APPLY**. The screen will list the actions taken and success or failure.

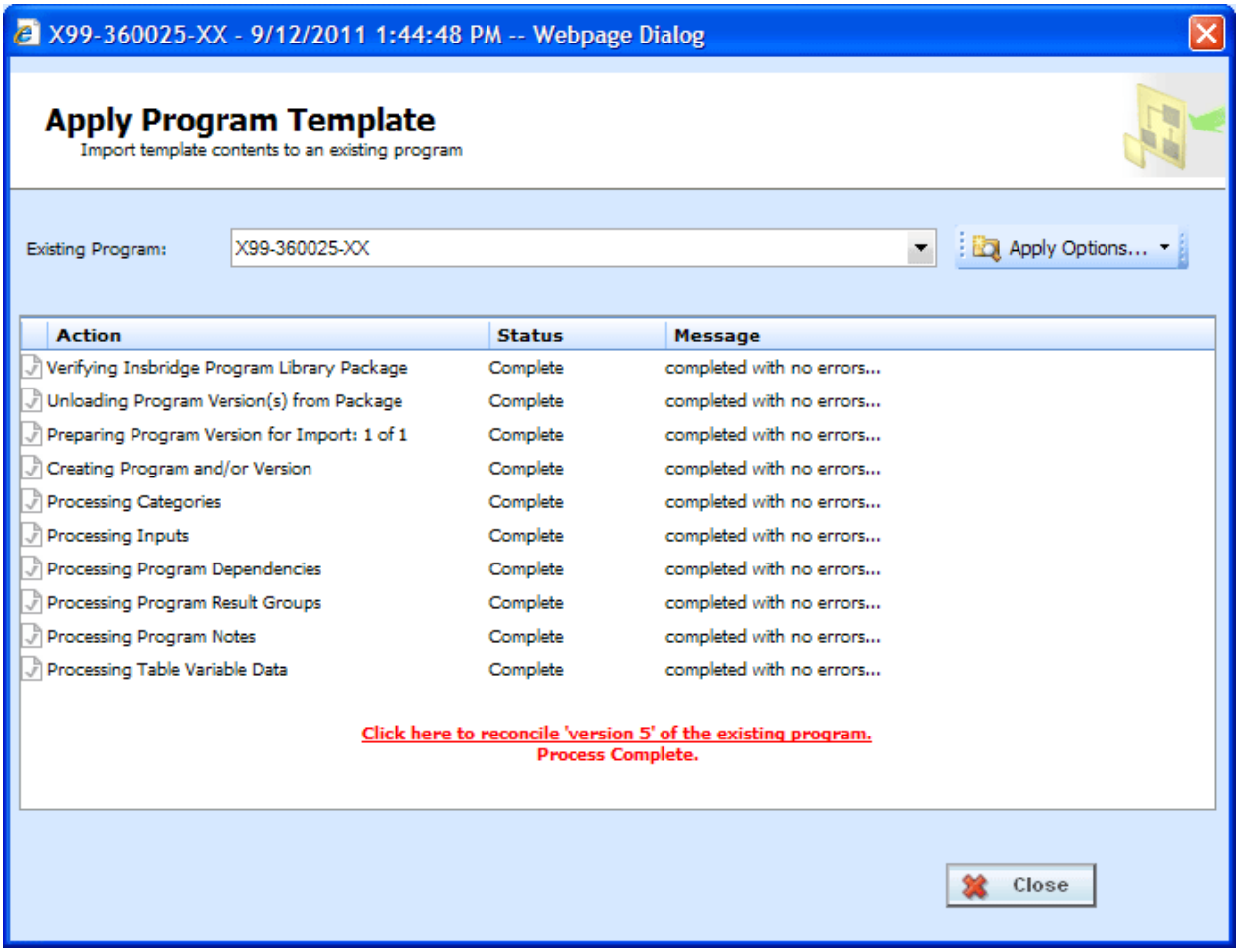


Figure 383 Successful Template Applied to an Existing Program

If the template is successful, the program will be placed in the location selected.

If the template failed, a failed message will be listed and no program will be applied. If one item fails, the template will not be created. All items must pass.

- A check at the front of the action and **Complete** status indicate **success**.
- An **X** at the front of the action and a **Failed** status indicates a **failed** template application.
- A blank status indicates that this action was not needed.

For successfully applied templates to an existing program, a link will be at the bottom of the screen that will open the Reconciliation wizard. This will allow you to see the differences between this version and the previously applied version. See Reconcile for more information.

RECONCILE

The Reconcile option allows you to reconcile one program version against another. For example, when a new template is imported into a subline, you can check the new template against an existing template to see what the differences are. The differences that will be recognized are additions and changes to existing table and calculated variables and algorithms. No deletions will be noted. Sequencing, result mapping and driver assignments will not be compared.

The first program version you chose will act as the “base” version. This version is static. The second version will be compared to the first one. Any additions or changes will be against the second version. As the versions reconcile, you may accept or reject differences as you want. The acceptance or rejections will be placed on the second program version you choose. No alterations will be made to the first version.

This option is available to all unlocked programs and will be displayed when 2 or more versions of the program are listed. Program versions must be packaged. Locked versions cannot be reconciled.

If you want to compare template or imported versions, make sure the versions have both been brought into the subline and are packaged. If a version you want is not in the subline, please return to library to apply or to import.

To Reconcile Two Templates

1. Click the link at the bottom of the Successfully Applied Template wizard. You also can select **RECONCILE** from the right click menu of a template program. Only programs with more than one version will have this option available. This will take you to the Reconciliation wizard.

Figure 384 Reconciliation Wizard Welcome

2. Click **Next** to continue. If this is not the screen you need, click Cancel to close the wizard and return to the program screen.

NOTE: *The program name will be listed at the top of the window.*

3. **Select the version** you want to compare against the base. This can be a newer version of the program or it can be an older version. This version will have differences noted. If you reject a change, this version will be updated to reflect your refusal. For example, if the comparison version has three new variables added, you can choose to not keep those additions.

   It is automatically assumed that changes will be accepted. If you want to accept the changes, you do not need to check anything.

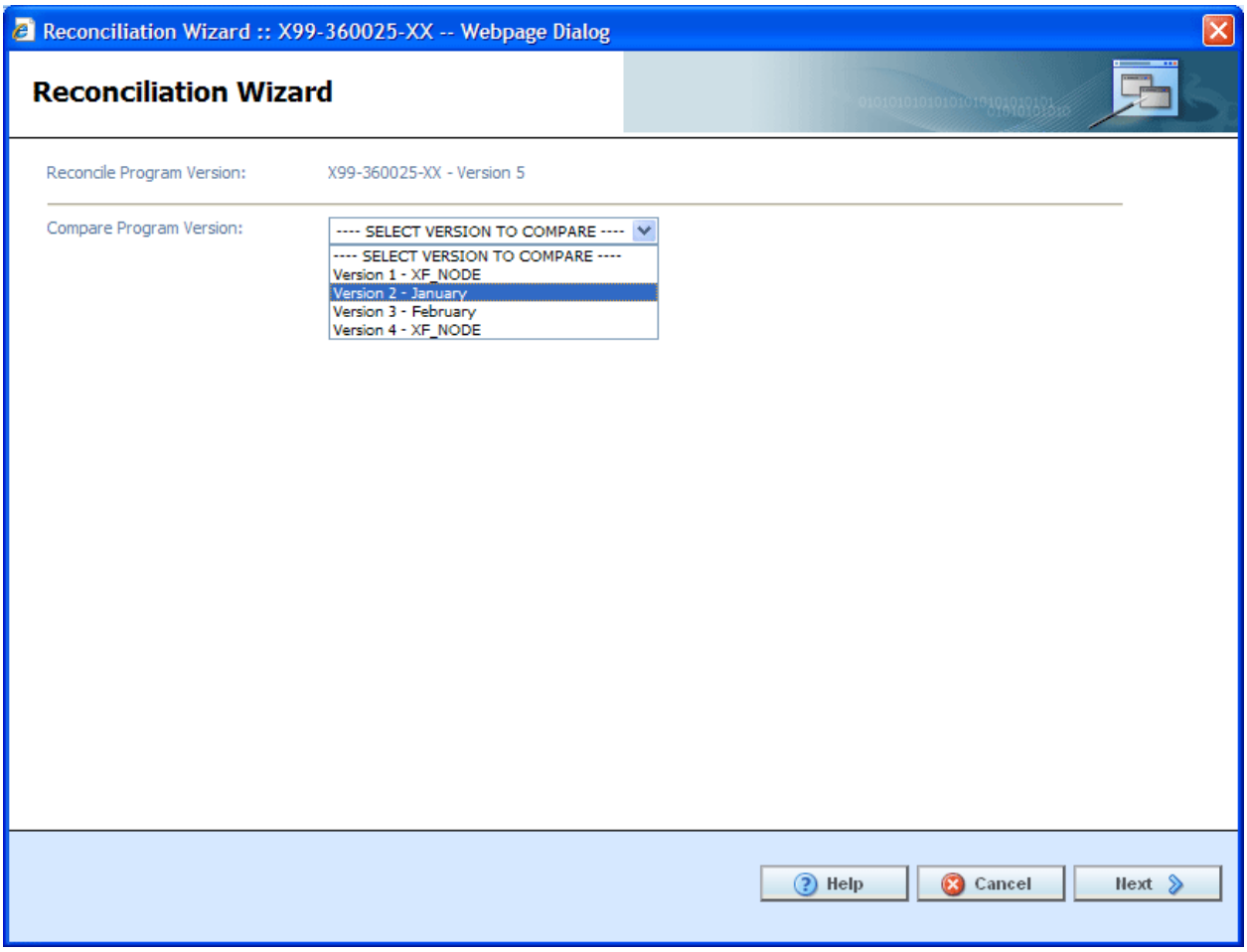


Figure 385 Selection Versions to Compare

4. Click **Next** to continue. If this is not the screen you need, click Cancel to close the wizard and return to the program screen.

   The reconciliation will begin.

NOTE: *If you reject changes and later find you want these changes reinstated, you can return to the library screen and re-import the template. It will come into the subline as the next available version number.*

5. Algorithms are done first. If there are any new or changed algorithms, they will be displayed in the list. Algorithms that are grayed out are new and will automatically be included. To reject any changed algorithms, uncheck the **Activate** box in front of the algorithm that you do not want to accept. You can reject one or all changed algorithms. To reject all, uncheck the Activate box at the top of the screen. This will reject all changes.

   If algorithms do not have any changes or additions, the screen will display a “No algorithms to process. Continue to next step” message. There will not be a checkmark in the activate box or any reports to view.

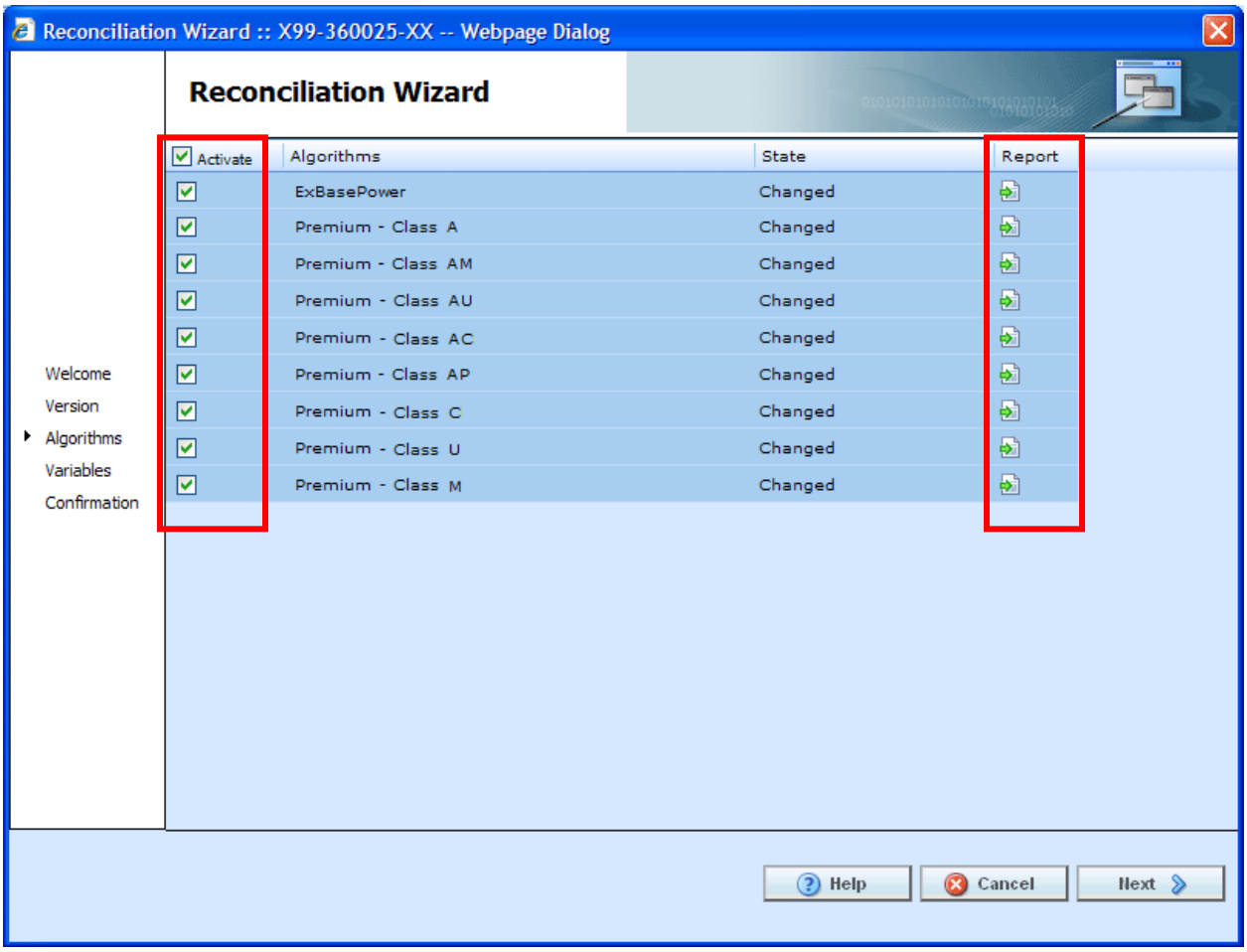


Figure 386 Reconciling Algorithms

6. When you are finished, click **Next** to go to the next screen.

NOTE: *At any time, if you mistakenly reject a change you can click Cancel to cancel out of the reconciliation. No rejections will be made until the final screen. Once Finished is clicked, rejections will be permanent.*

7. Variables are done next. If there are any new or changed variables, they will be displayed in the list. To reject the new or changed variables, uncheck the **Activate** box in front of the variable that you do not want to accept. You can reject one or all changed or added variables. To reject all, uncheck the Activate box at the top of the screen. This will reject all changes and additions.

   If you reject a change on the algorithm screen, the variables involved will be listed here. If you reject a change or addition, the system will re-evaluate the relationships between the variable and the other variables or algorithms where it was used. Any other variables that are affected by this rejection will be listed. The screen will refresh with the next level of variables in the relationship. They will be grayed out. Click **Next** to continue until all levels have been displayed.

   If variables do not have any changes or additions, the screen will display a "No variables to process. Continue to next step" message. There will not be a checkmark in the activate box or any reports to view.

8. When you are finished, click **Next** to go to the next screen.

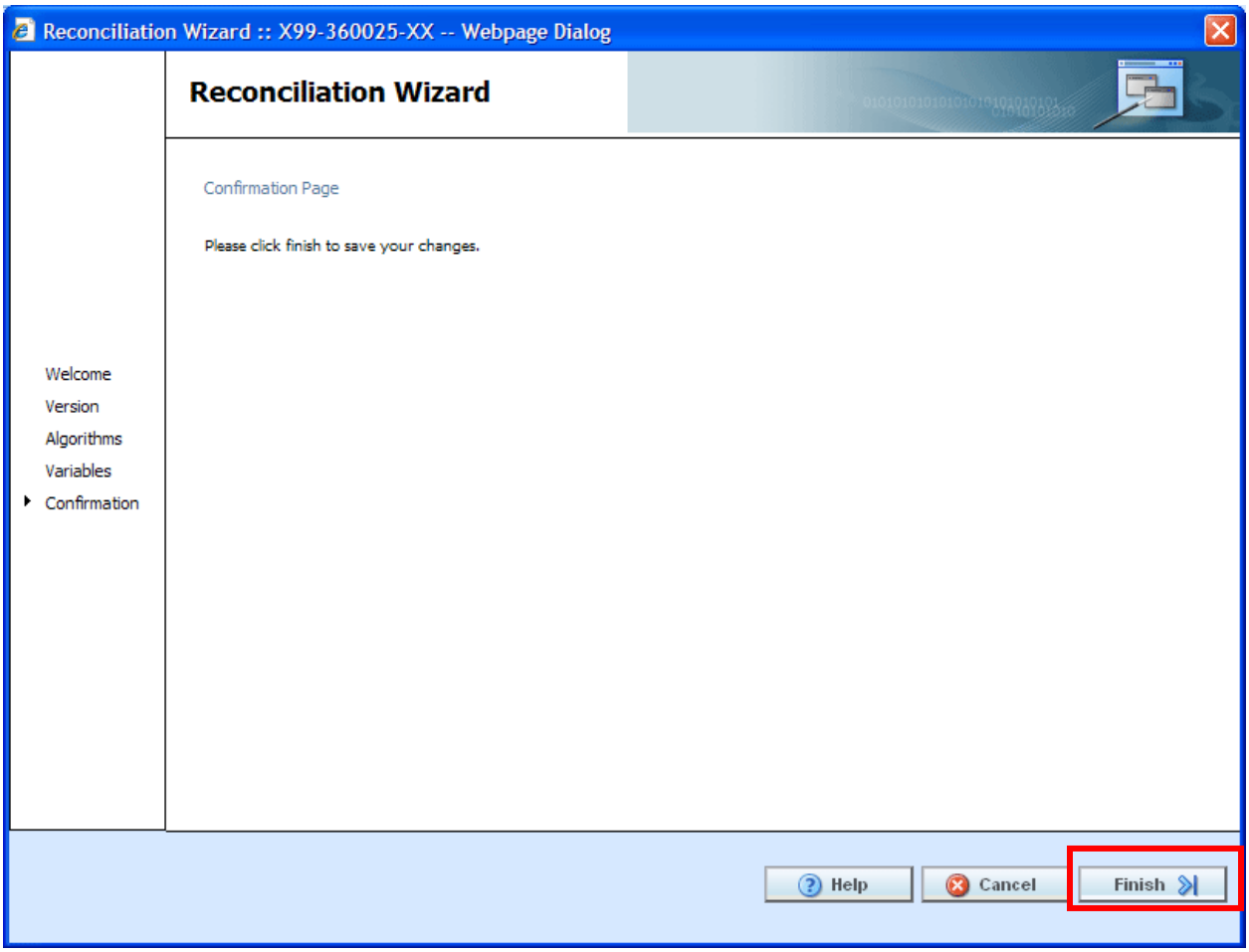


Figure 387 Confirmation of Template Reconciliation

9. On the Confirmation tab, click **Finish** to accept or reject the changes and additions.

   If you are not sure that you want to make any changes, click Cancel to exit the wizard without making any changes

10. A confirmation screen will be displayed when the reconciliation is complete. Click **Close** to close the reconciliation.

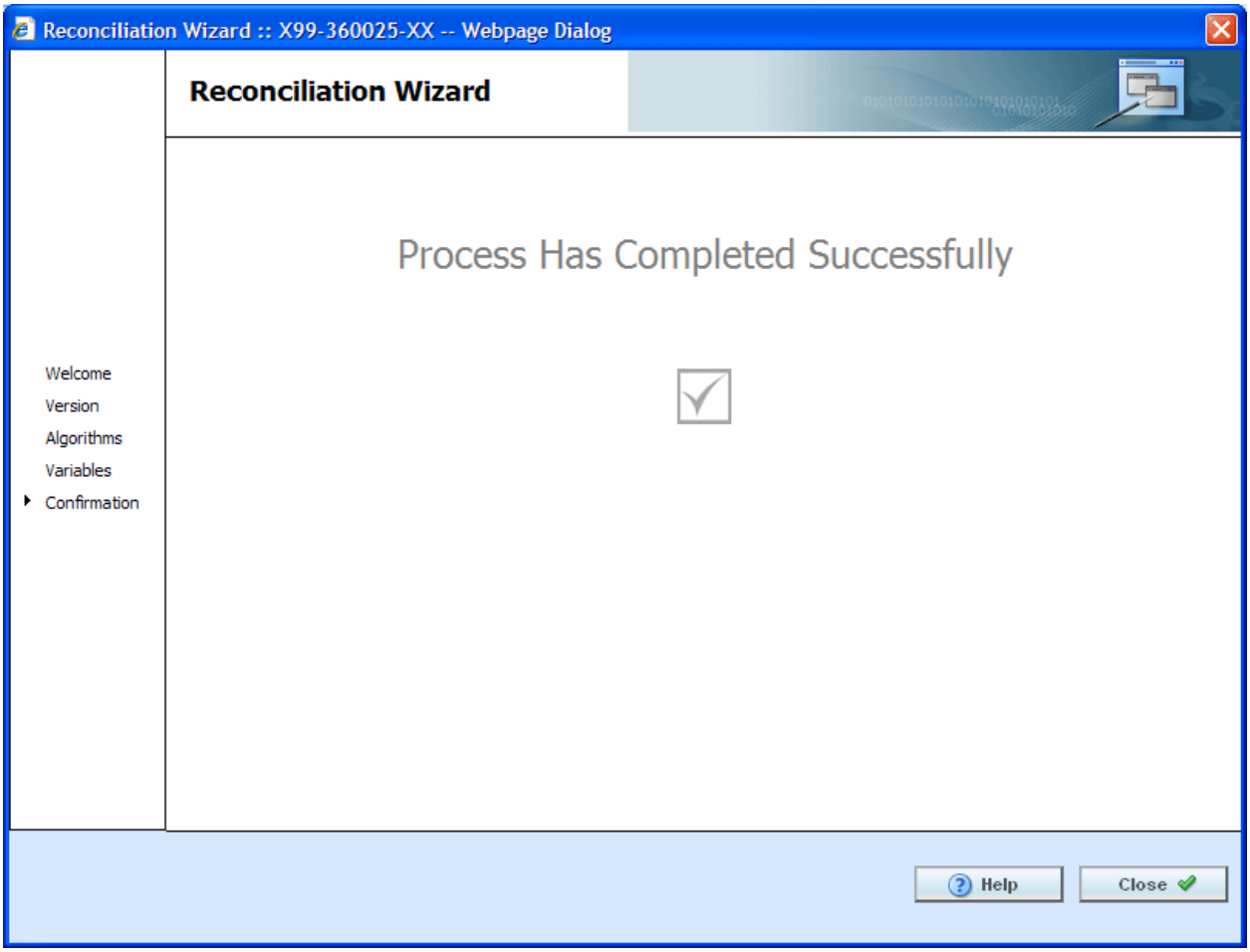


Figure 388 Successful Template Reconciliation

If you have made any rejections to the changes found in the version you compared, the version will now reflect those changes.

Viewing Reconcile Reports

To view the details of the changes or additions, click the report icon at the end of the row. A separate screen will be displayed with the details of the algorithm or variable.

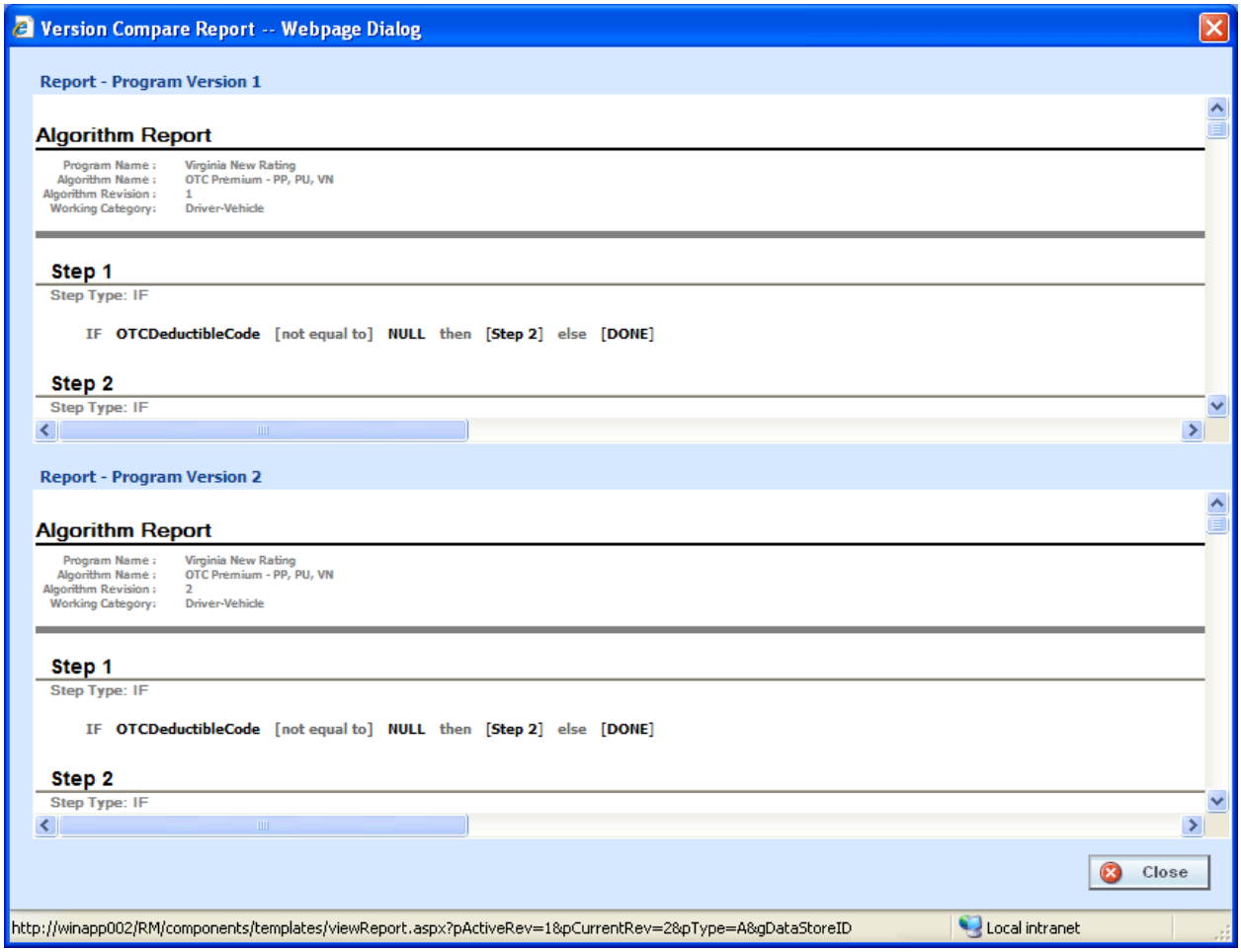


Figure 389 Version Compare Report

No action can be taken from this screen. If you want to reject the changes, close the screen to return to the previous screen.

Failed Template

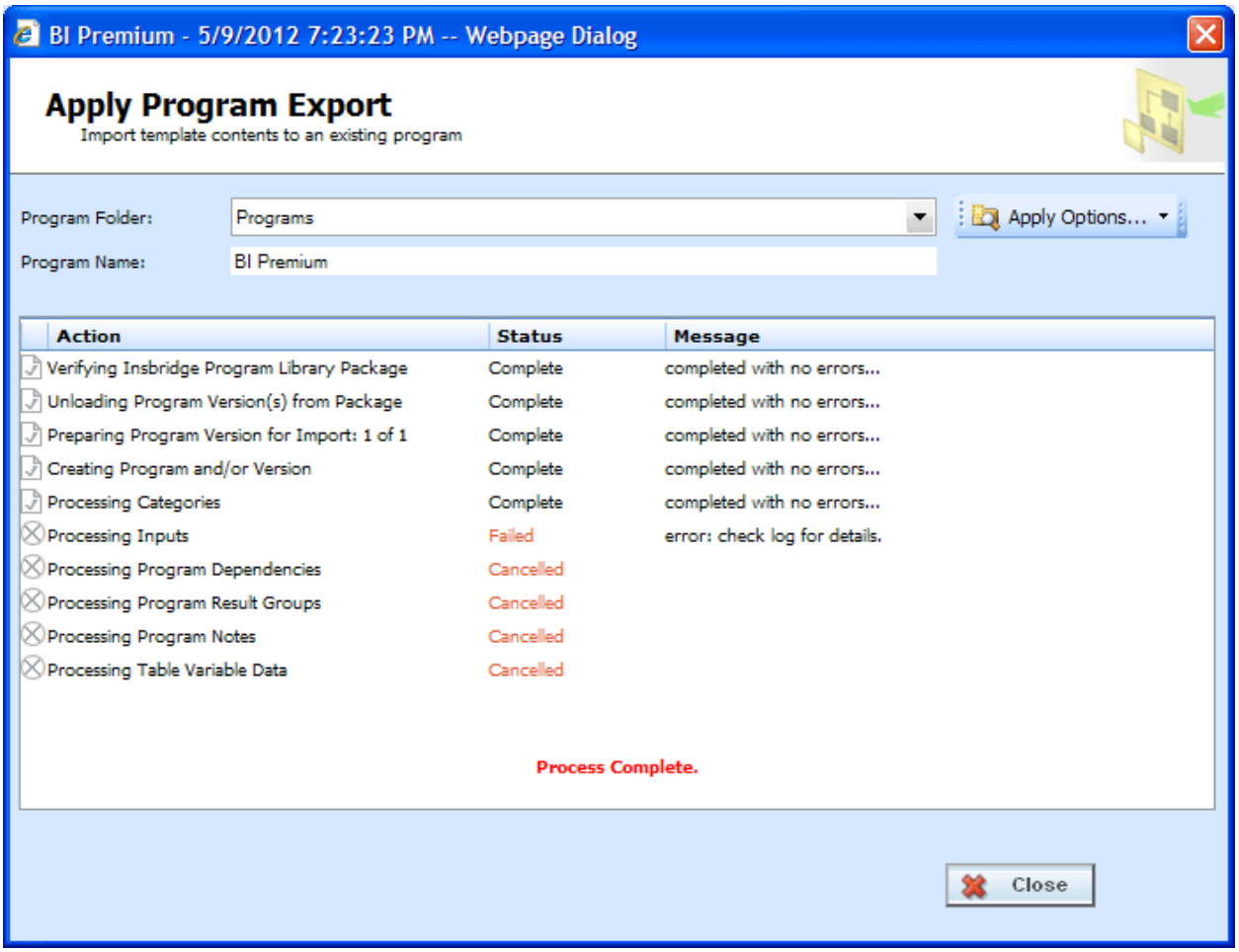


Figure 390 Failed Template

Hover your cursor over the Failed status to get the error message. A more detailed error message may be listed in IBFA→Logs→Error. Please contact your system administrator to assist with obtaining the message.

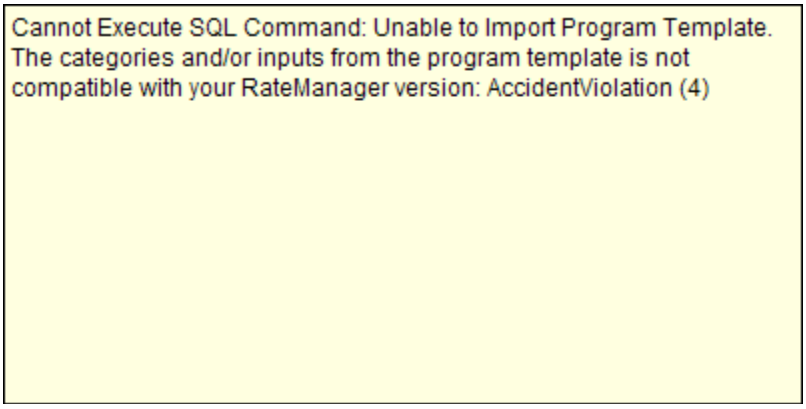


Figure 391 Failed Template Message

Completed Template

The library screen will not change when the template creation is complete. There will be changes in the left hand side menu, under the line of business you just added the template to.

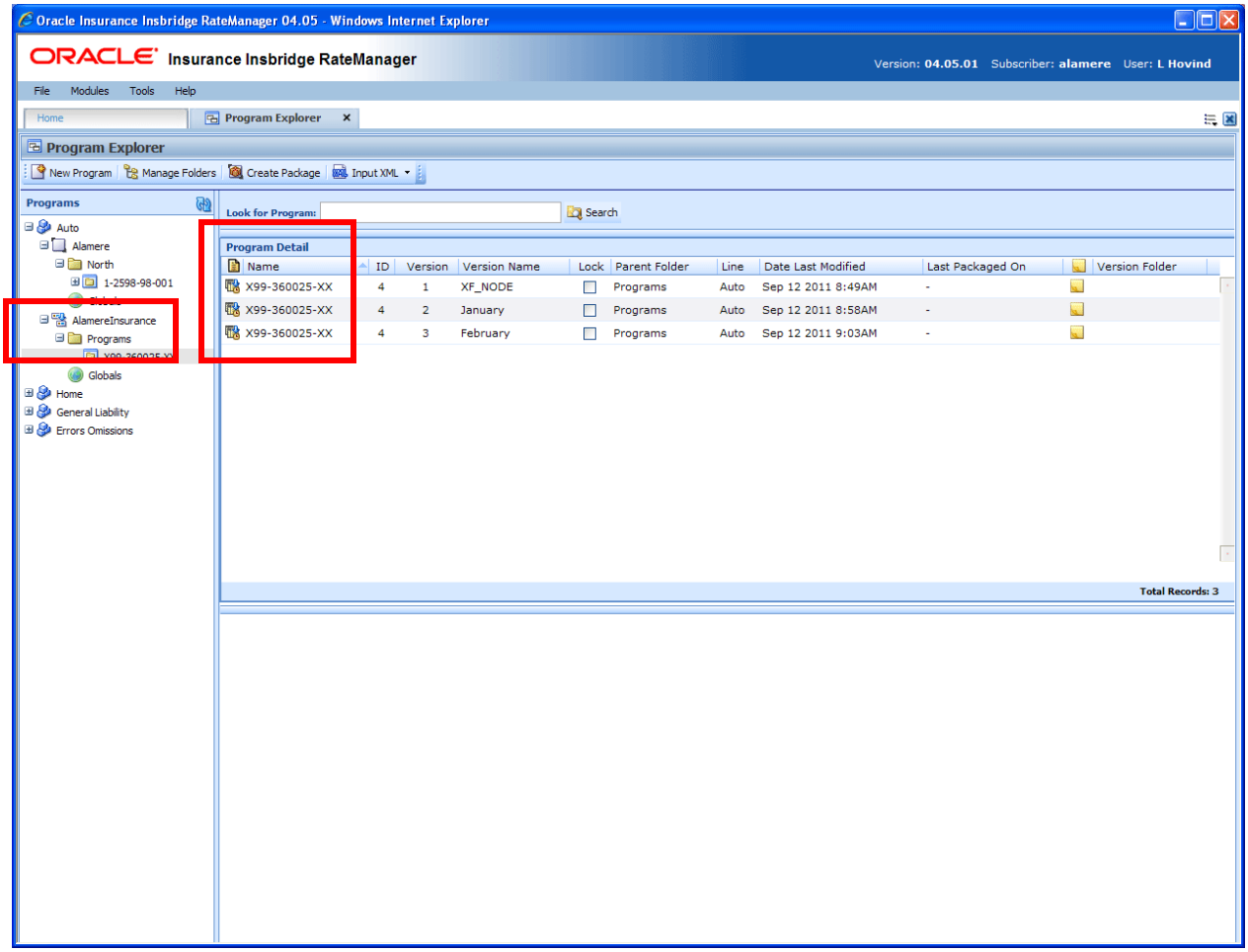


Figure 392 Applied Templates in Program Explorer

Under the line of business for the template, a new subline will be listed. Under this subline is a program folder, with the templates under that.

There are two types of programs:

Standard Programs – These are program versions that you created. Unless locked, you will be able to add, edit or delete any item from this program.

Template Programs – These are program versions that were created from a template. Template programs automatically have variables, algorithms and driver assignments locked. These items cannot be edited or deleted. You will be able to add items and create revisions. Any globals associated with a template will be locked as well.

CUSTOM XML FILES

Currently, when a user wants to map their custom XML to Insbridge XML using the RateManager XML mapping tool, they have to define the source XML and the target XML. The only way to provide the mapping tool the custom XML (source) is to copy/paste the XML using the Import Custom Xml button.

The Custom XML screen on the Library tab alolows users to park some common XML templates, such as ACORD XML to be used as the source XML to map from. You also have the ability to define custom XML templates that are available to be selected in the Custom XML Mapping screen (for Input and Output Mapping).

Chapter 30

SYSTEM REPORTS

RateManager has a wide variety of reports available at the element level and at the program level. The majority of report options can be accessed from a right click menu. Most elements and programs in RateManager have a right click menu that will list the report options available.

Line Input XML and Program Input XML are available from an option on the top bar menu of the Program Explorer tab.

- **Program Difference Report** compares two versions or packages from the same program and shows the differences between the two.
- **Program Version Report** provides the details of a program version.
- **Line Input XML Report** lists the inputs used in the line in XML format.
- **Program Input XML Report** lists the inputs used in the program version in XML format.
- **Dependency Report** will give you a tree view of all the associated variables and how they relate to one another.
- **View History Report** will display a history of actions taken and provides a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information.
- **PDF Report** is for any table variable, either global or local, and is a PDF of the data table created.
- **Quick View Reports** gives a detailed view of a variable, algorithm or drivers assignments showing all of the steps. This option is for table and calculated variables, algorithms or scenarios.
- **Quick View Report (All Data)** shows all table data associated with the variable. This option is only available on table variables.
- **View Where Used Report** allows you to see if and where a variable or input is used in a program.
- **View (Input) Report** allows you to view the pertinent information for a result variable or an input variable.

NOTE: *The Insbridge message service must be on for the reports to generate.*

PROGRAM DIFFERENCE REPORT

Program Difference Report compares two versions or packages from the same program and shows the differences between the two. When running a Program Difference Report:

- The versions and/or packages are from the same program. You will not be allowed to compare version 1 from program 1 to version 2 from program 2.
- If comparing two versions, the versions must be different. You cannot compare version 1 to version 1.
- Versions are current. The version you select will be the version currently in the system.
- Versions can be compared to a package. The package and the version can be from the same version. You can compare a version 1 package to the current version 1.
- Packages must be created in RateManager 3.12 or greater. Lower versions of RateManager will not have this feature.
- Packages can be compared either to another package or to a current version.
- If comparing two packages, the packages must be different.
- Either RateManager or SoftRater packages can be used.
- If the option to select a package is grayed out, you have not created the package in RateManager 3.12 or greater. If you want to compare a package, please exit the report and create either a RateManager or SoftRater package.

The differences that will be recognized are:

- Elements that are used in one version or 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 version or package. For example, if version 1 used revision 1 of an element and version 2 used revision 2, then the report would list that the element was used in both versions 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 version, the difference will not be noted.

This option is available on all programs in all sublines. To create a Program Difference Report, you must have either two versions, or one version and one package. If you have one version and no package, you will not be able to create a Program Difference Report.

Reports will be displayed in the Insbridge Document Viewer. Reports can be saved to your local drive or network or printed. No editing can be done on the Insbridge Document Viewer.

NOTE: *OBI Publisher must be installed and running in order for Program and Program Version Reports to be displayed. If you receive an OBI Publisher error, please contact your system administrator.*

Running a Program Difference Report

1. From the Program Explorer tab, right click on the program where you want to run a Program Difference Report.

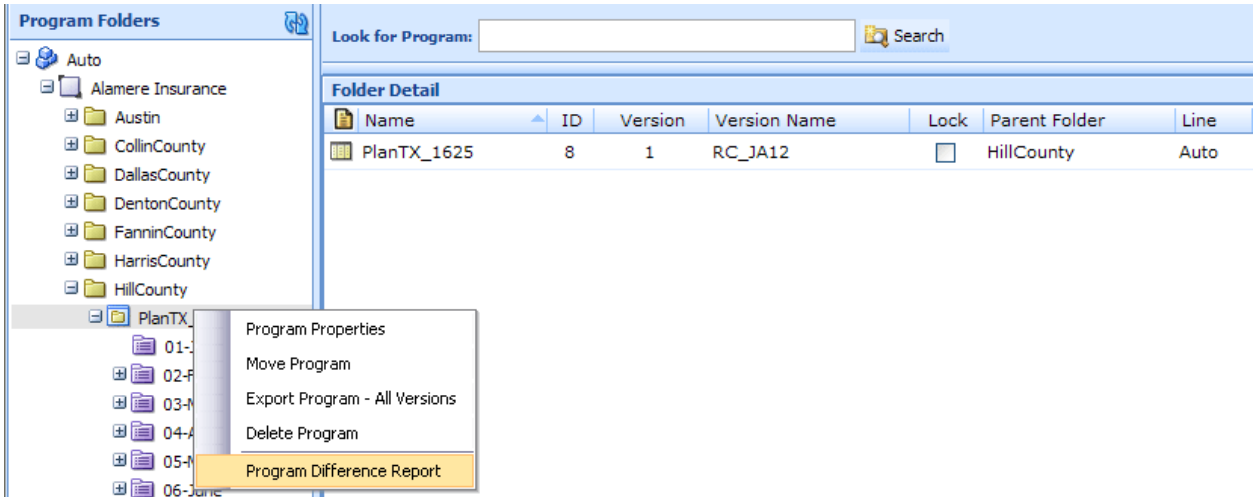


Figure 393 Program Difference Report Right Click Menu

2. Select **Program Difference Report** from the right click menu. A wizard will be displayed.

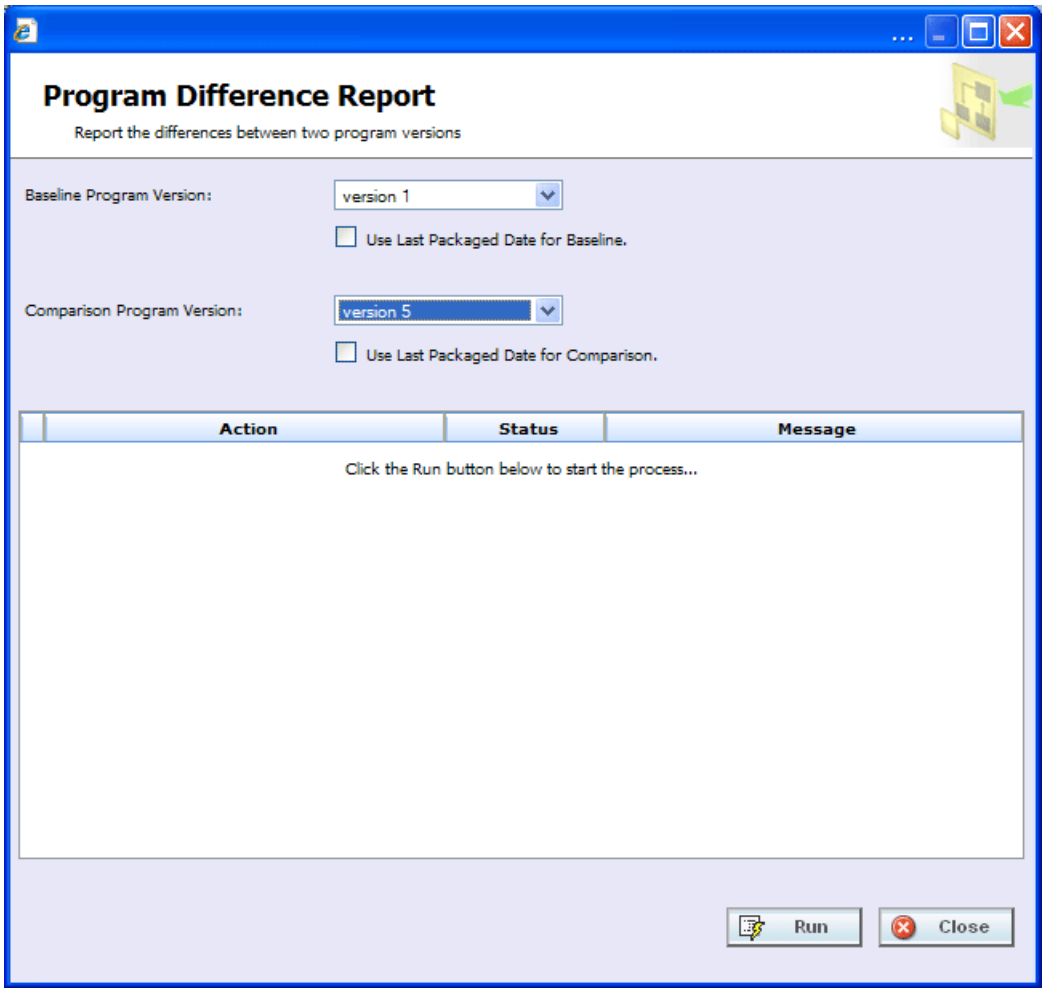


Figure 394 Selecting Programs Versions to Compare

3. Select the **Baseline Program Version**. All versions will be listed. This version will be the standard that the other version is compared against.

4. If the selected version has a package created, you will have the option to check if you want to **use the last package** for this version. If the option is grayed out, no package was created.

5. Select the **Comparison Program Version**. All versions will be listed. This can be any other version in the program, either newer or older.

6. If the selected version has a package created, you will have the option to check if you want to **use the last package** for this version. If the option is grayed out, no package was created.

7. Click **Run** to start the report. The progress will be displayed as the report runs.

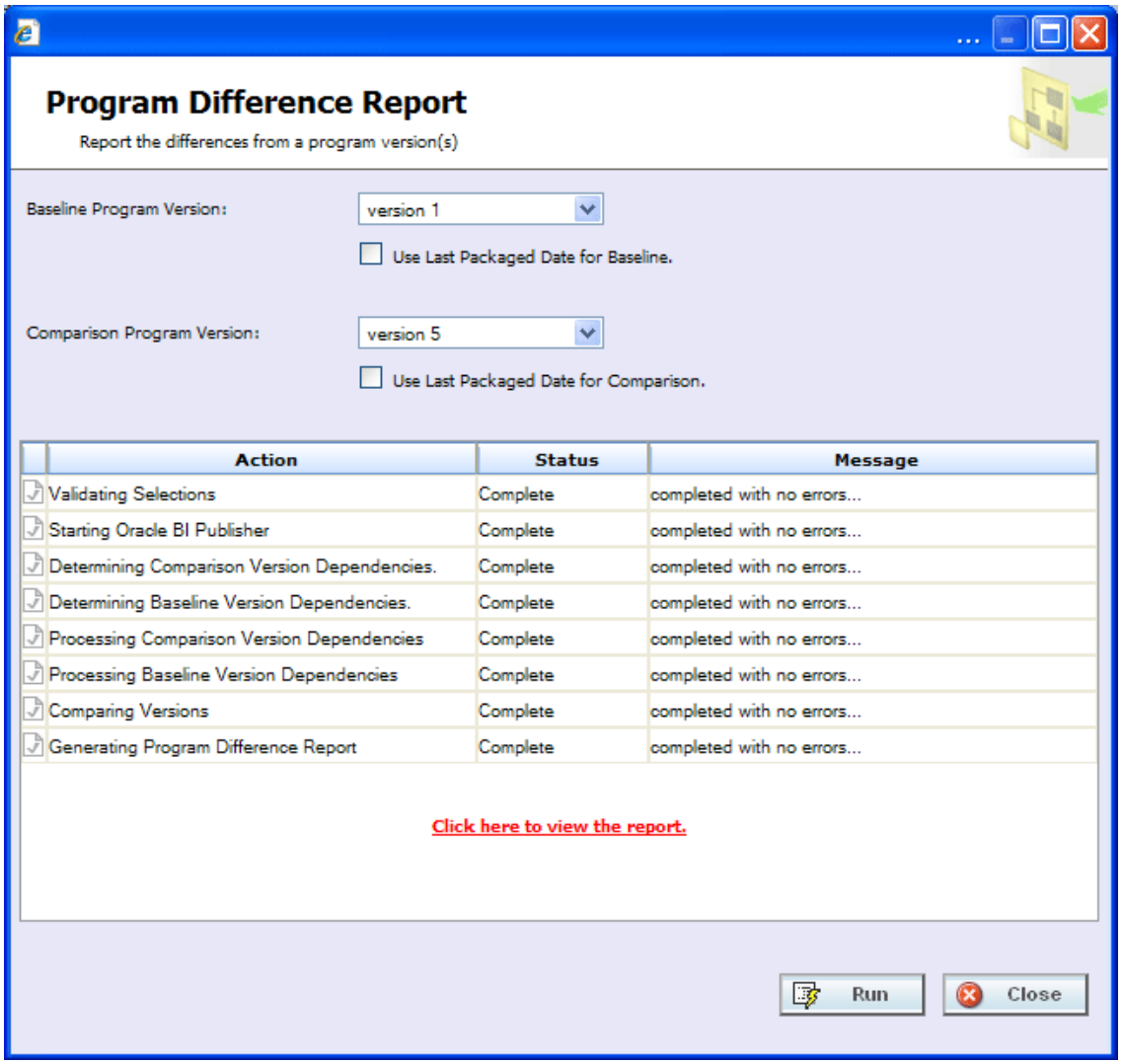


Figure 395 Completed Program Difference Report

8. Click on the "**Click here to view the report**" link. The report will be displayed in the Insbridge Document Viewer.

   If any errors occurred while running the report or displaying the report, please contact your system administrator.

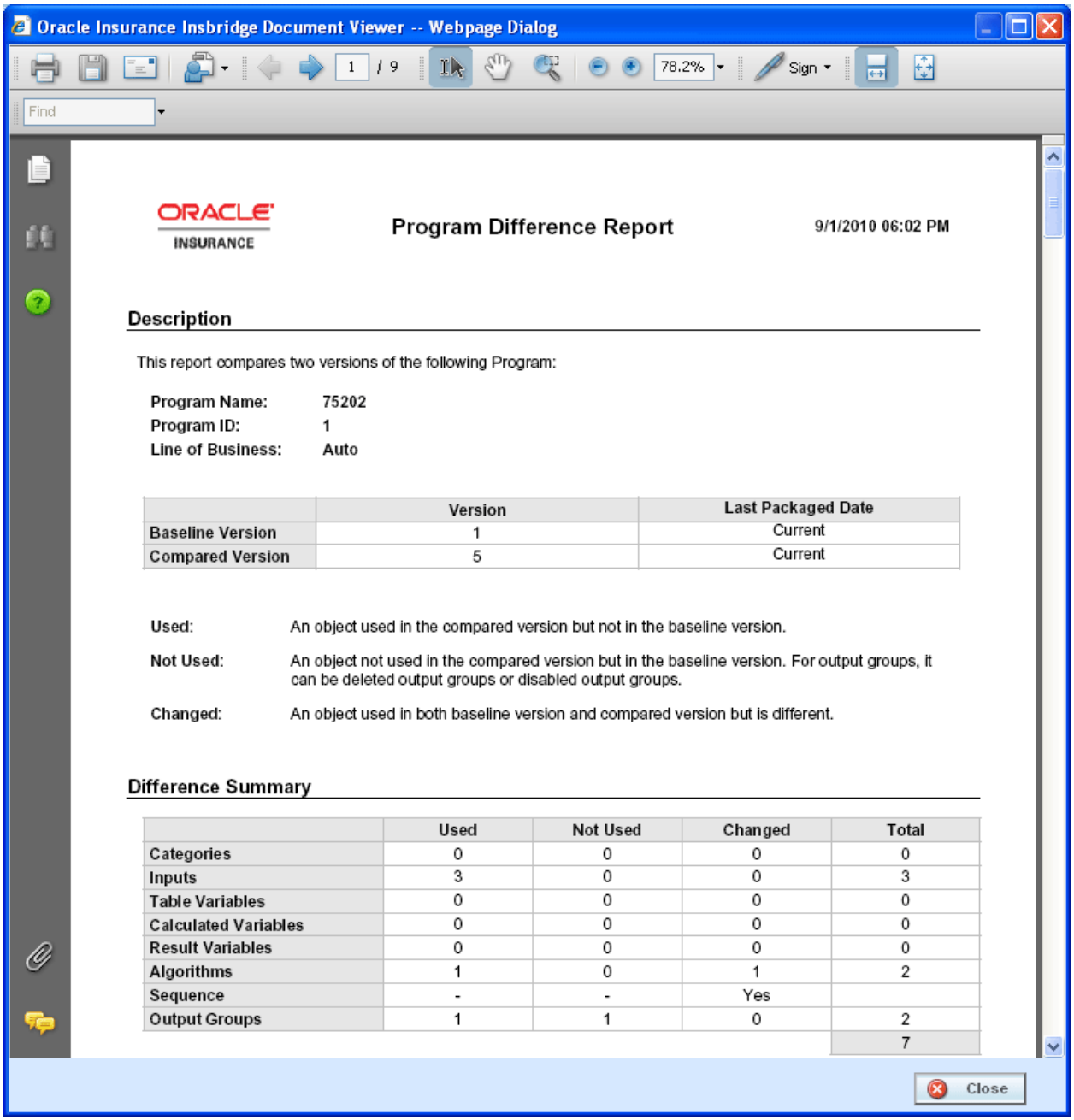


Figure 396 Program Difference Report

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.*

Report Details

The report will have a description at the top, identifying the program, program ID and LOB. The Baseline and Compared versions will be listed next. If the Last Packaged Date is **Current**, the program version was used. If there is a date listed, the last package for this version was used.

Definitions

- **Used:** an element that is used in one version but not in the other version. Used elements will be listed underneath the version where they are found.
- **Not Used:** an object that is not used in one version but is in the other version. Not Used elements are represented by blank fields underneath the version where they are not found.
- **Changed:** an element that is used in both the baseline version and the compared version but has been changed in some way. Changes will be displayed below the Not Used//Used section.

The following elements will be shown in Used /Not Used section if they meet Used/Not Used criteria:

- **Inputs**
- **Categories**
- **Global Result Variables**
- **Table Variables**
- **Calculated Variables**
- **Algorithms:** if the name is different, it will show in the Not Used/Used section.
- **Result Groups:** deleted and disabled result groups will be counted as Not Used.

The following objects will be shown in Changed section if any of the elements listed changes:

- **Inputs:** Data Type or Category changes.
- **Categories:** Parent Category changes.
- **Global Result Variables:** Data Type or Category changes.
- **Table Variables:** Data Type, Category, Default Value, Qualifiers or Data changes. Data changes will list the dates of the last time the data was modified. The first date is for the baseline and the second is for the comparison. A change(s) was made some time between the two dates.
- **Calculated Variables:** Data Type, Category or Instructions changes.
- **Algorithms:** Category or Instructions changes. The step details will be listed out.
- **Result Groups:** The combination of Description and Result_ID changes or Category or Enabled changes.
- **Sequence:** The order of Algorithms changes or one or more algorithm(s) used/not used.

Only one report can be displayed in the Insbridge Document Viewer. You must close out the Insbridge Document Viewer to return to the report wizard. You can change the baseline or comparison program versions and run the report again. To return to RateManager, close the report wizard.

PROGRAM VERSION REPORT

A program version report provides the details of a program version.

1. From the Program Explorer tab, right click on the program version where you want to run a Program Version Report.

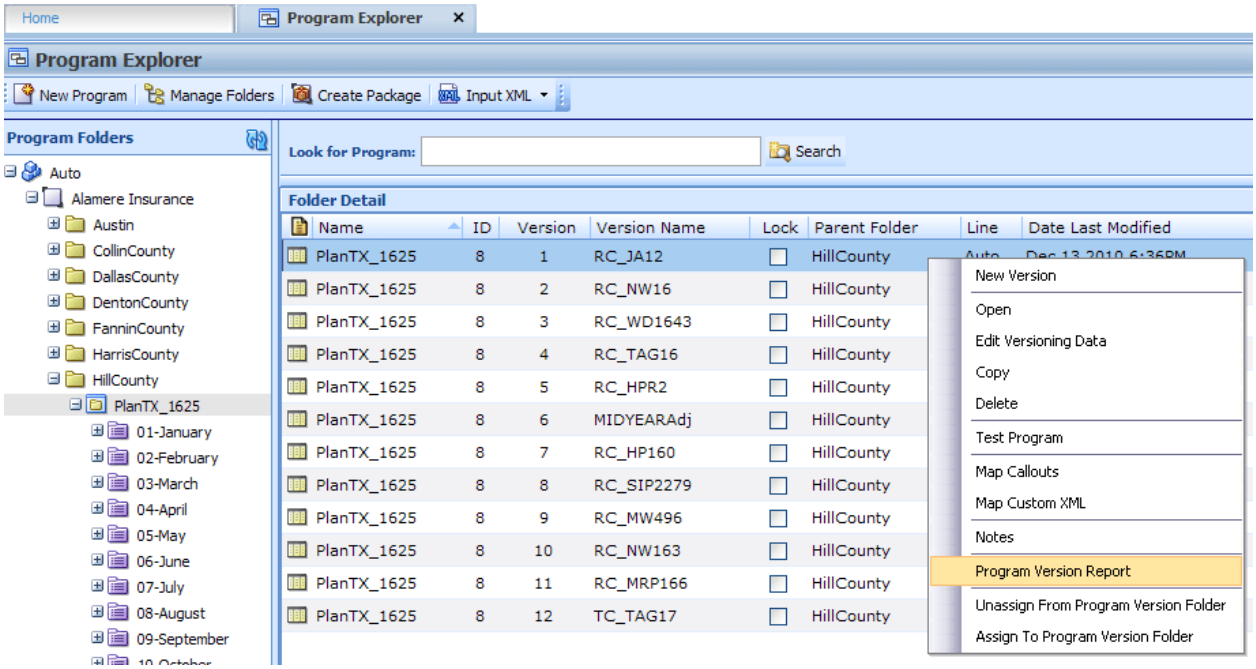


Figure 397 Program Version Report Right Click Menu

2. Select **Program Version Report** from the right click menu. The Insbridge Document Viewer will be displayed. Your report will be generated in a moment.

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.

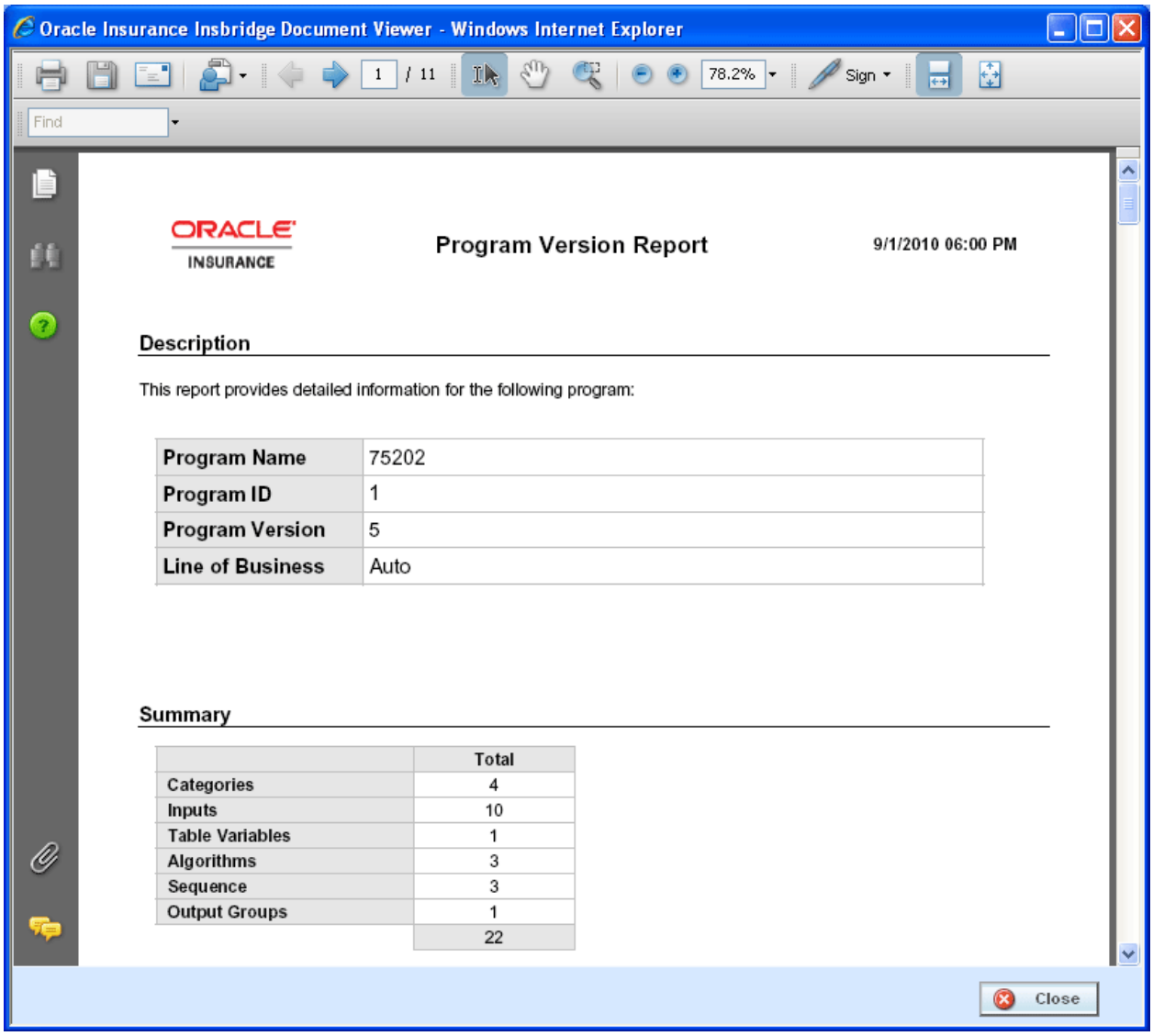


Figure 398 Program Version Report

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.*

Report Details

The report will have a description at the top, identifying the program, program ID, program version and LOB. The Summary list will be next. The Summary will list out the total number of elements found in the program version. The pages following will detail all of the elements

LINE INPUTS XML

Selecting the **Inputs XML→Line** menu option will pull up the line inputs XML for this subline. You can view or copy the line inputs XML. This feature can be accessed from the Program Explorer tab.

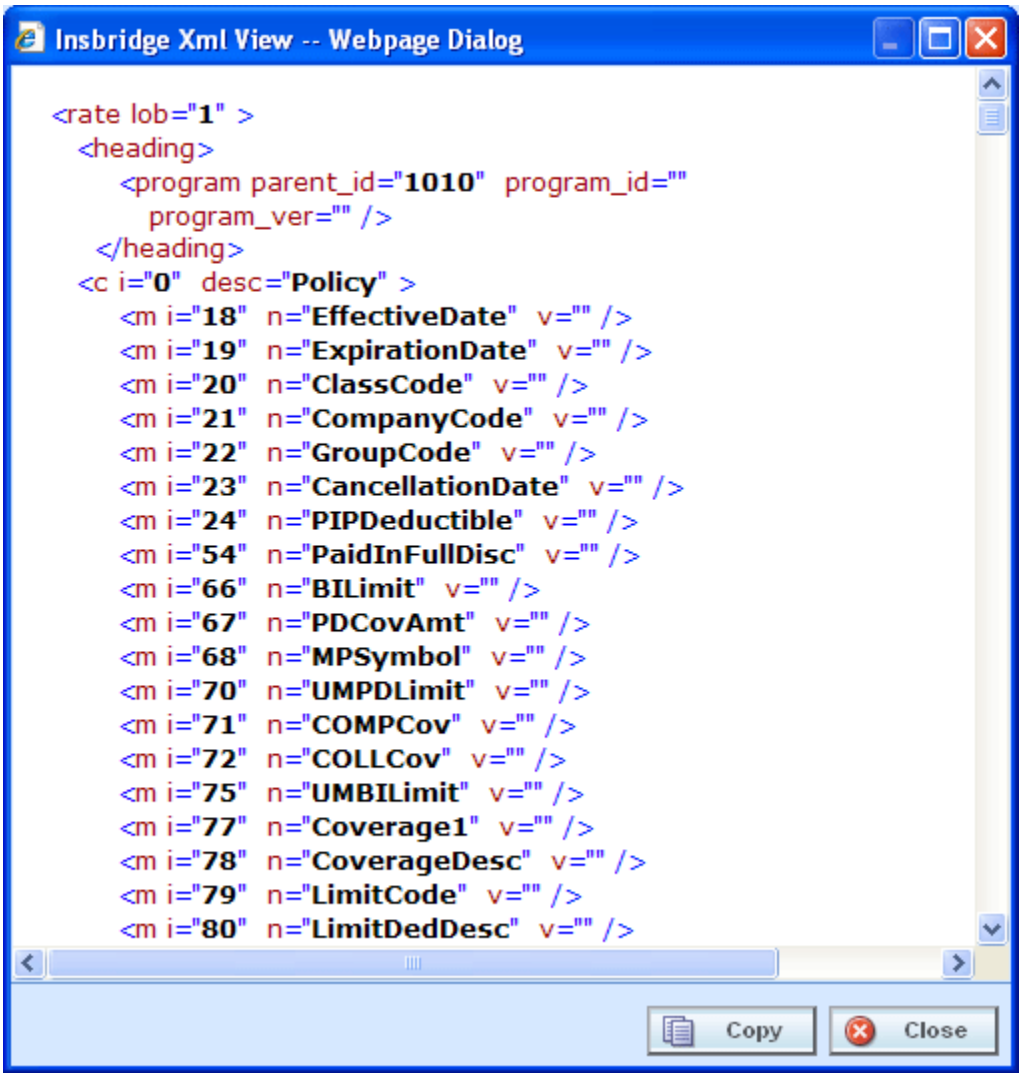


Figure 399 Line Inputs XML

To View Line Inputs XML

1. From the Program Explorer tab, select a subline.
2. Select **Inputs XML→Line** from the top bar menu.
3. A separate window will open that allows you to view or copy XML for this subline.
4. Click **CLOSE** to close the window when you are finished.

PROGRAM INPUTS XML

Selecting the **INPUTS XML→ PROGRAM** menu option will pull up the program inputs XML for the selected program version. You can view or copy the program inputs XML. This feature can be accessed from the Program Explorer tab.

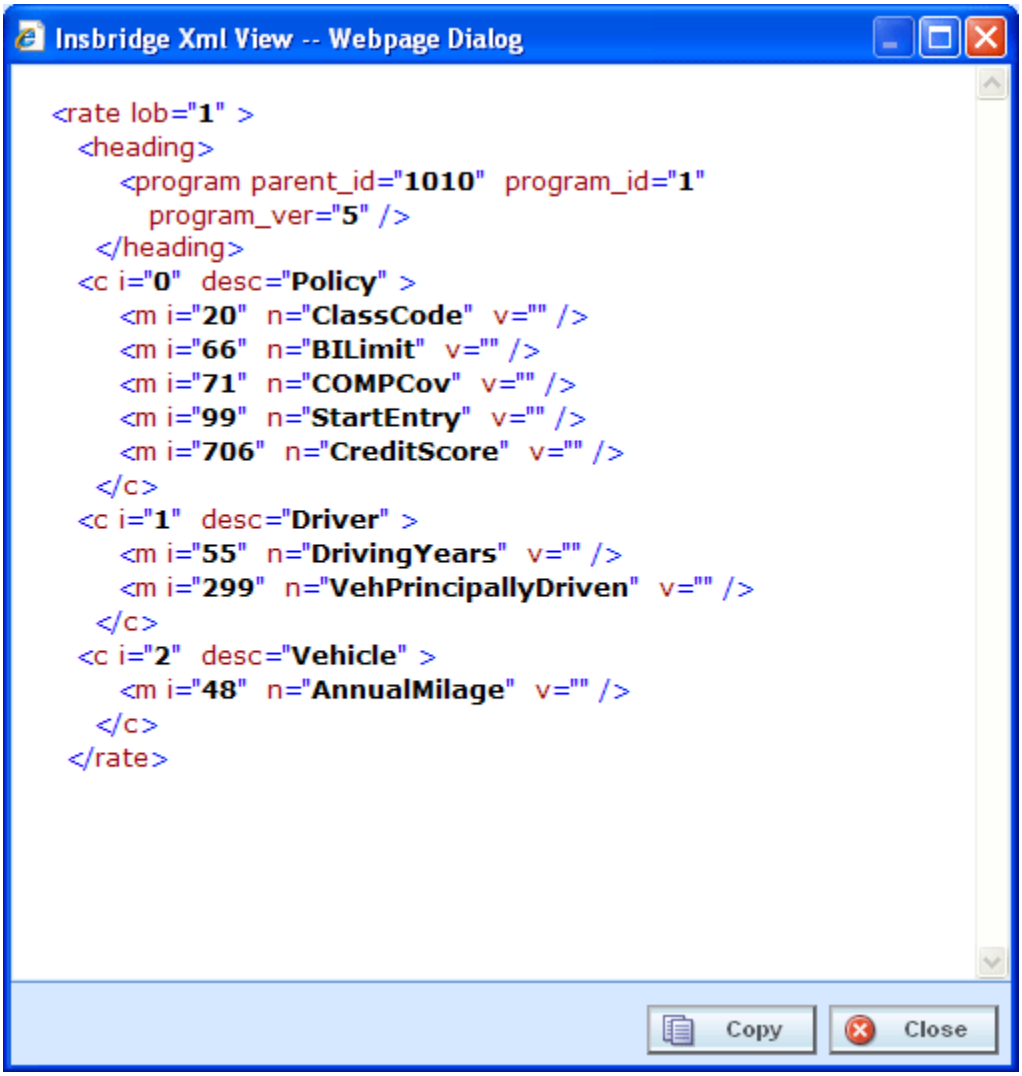


Figure 400 Program Inputs XML

Viewing Program Inputs XML

1. From the **Program Explorer** tab, select the Line of Business→Subline→Folder→Program→Program Version.
2. Select **Inputs XML→Program** from the top bar menu.
3. A separate window will open that allows you to view or copy XML for this program version.
4. Click **CLOSE** to close the window when you are finished.

VIEW DEPENDENCY REPORT

A Dependency report will give you a tree view of all the associated variables and how they relate to one another. Items can be expanded out by clicking the plus sign at the front of the variable. The item you selected will have a quick view report in the lower portion of the screen. This screen will contain the program name, revision and working category. Input variables and result variables will not produce a quick view report. Clicking on an algorithm will produce a report that lists the steps involved.

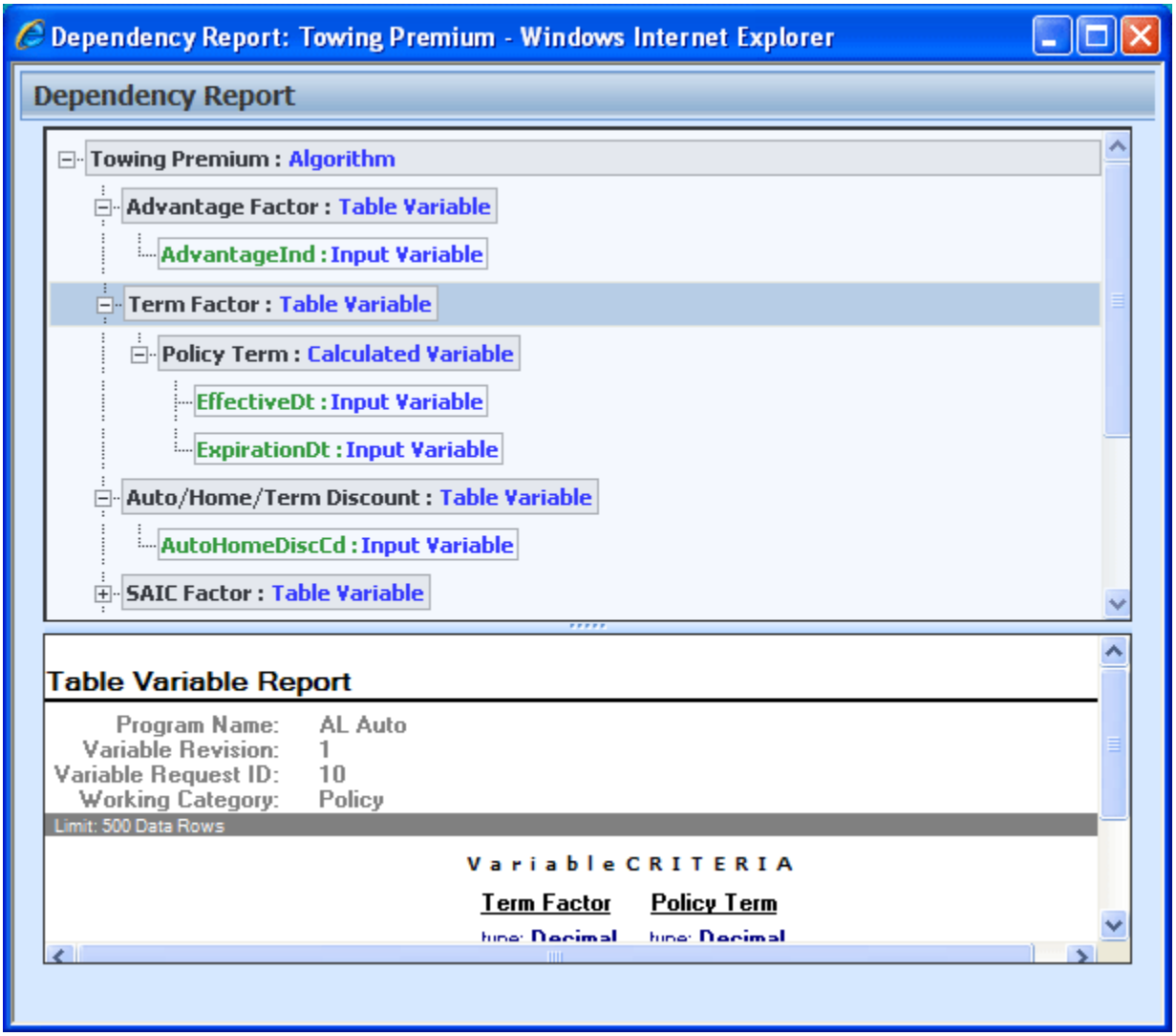


Figure 401 Dependency Report

- Yellow text indicates an algorithm.
- Green text indicates a result or input variable.
- Variables that are boxed in dark gray indicate a global variable.
- Light gray boxes indicate a local variable.

Dependency reports are available on table variables, calculated variables, algorithms and scenarios from the right click menu.

VIEW HISTORY

View History will display a detailed account of the action taken, who performed the action, the date the action happened, program information and any element information. View History is an optional feature that must be enabled by the system administrator on the User Groups tab. If auditing is set to Normal or High, actions will be recorded and presented in a View History report. If auditing is not enabled, the View History report will not display any actions.

The top portion of the screen will list the actions taken with the most current listed at the top. To view the details of the action, click **SHOW PREVIEW WINDOW** in the lower right hand corner of the screen and then click on an action you want to view. The details will be displayed in the lower portion of the screen.

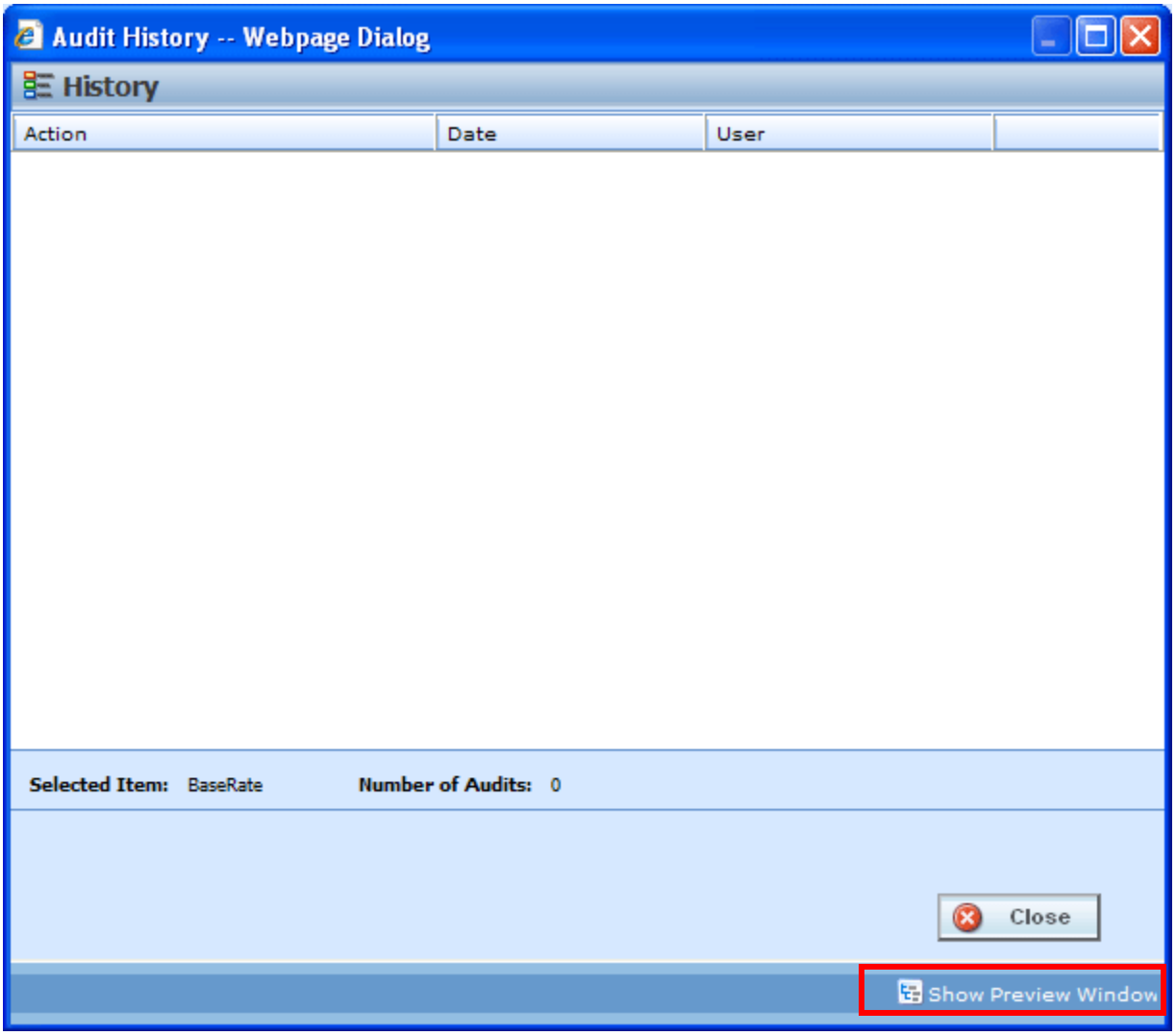


Figure 402 View History

If you do not want to view details, click **HIDE PREVIEW WINDOW** to remove the preview window.

View History is available on inputs, result, table and calculated variables, algorithms, and driver assignments from the right click menu.

VIEW PDF REPORT

Any table variable, either global or local, can have a PDF of the data table created.

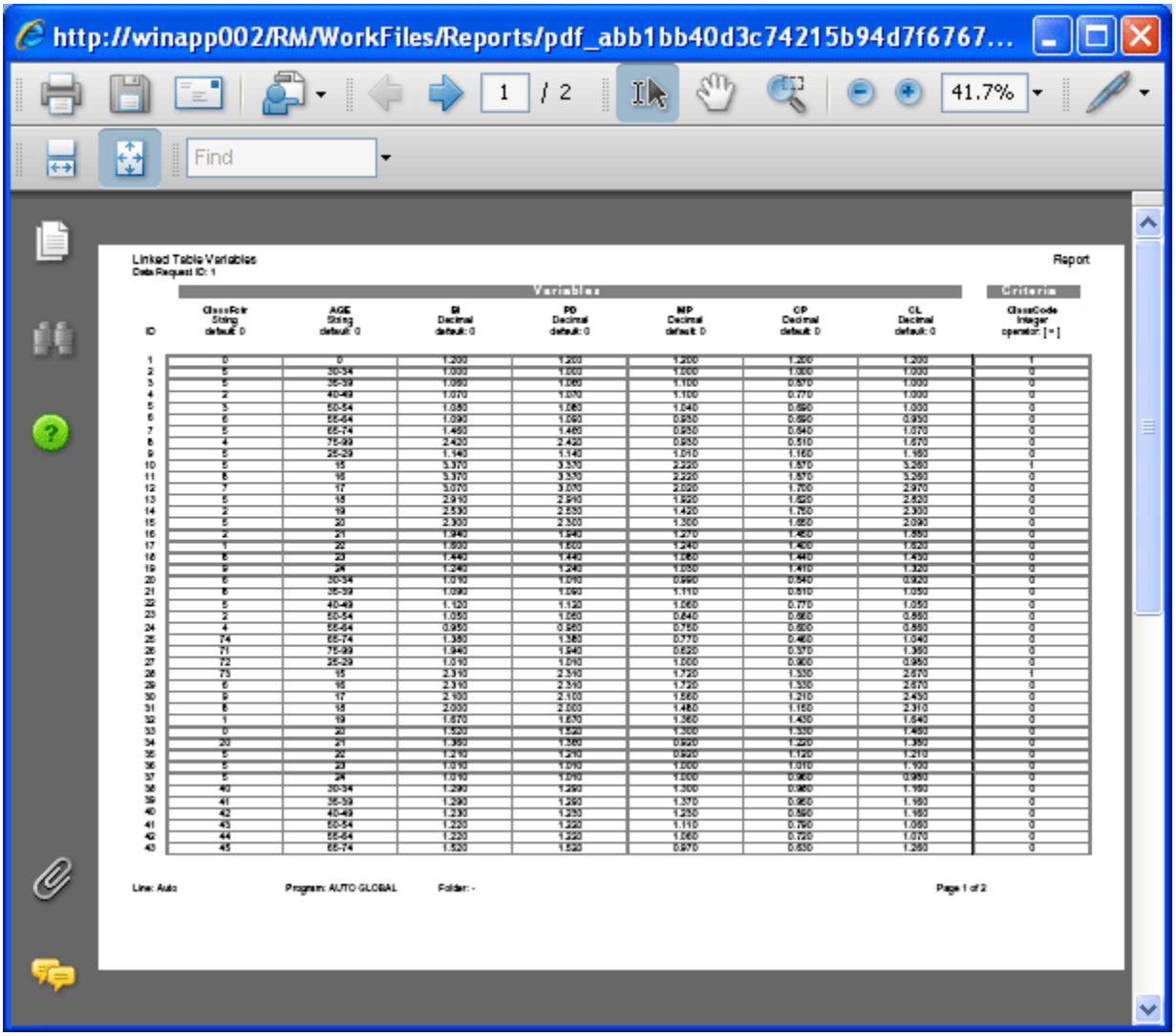


Figure 403 View PDF Report

NOTE: *PDF viewing software such as Acrobat Reader® is required to view PDF files.*

To View a PDF

1. Navigate to Program Version that contains the Table Variable you want to view.
2. On the Program Details tab, select the Table Variable where you want a PDF.
3. Right click and select **View PDF Report**.
4. The PDF will open in a separate window. You can Print or Save to your local machine or network if needed.

VIEW QUICK REPORT

View Quick Reports give a detailed view of a variable, algorithm or driver assignment showing either all of the steps or all of the table data, depending on type.

These reports are useful when reviewing because it eliminates the need to click through each step. Additionally, viewing a Report when in Edit Mode reduces the need to search for and review the variable, algorithm or scenario outside of Edit Mode.

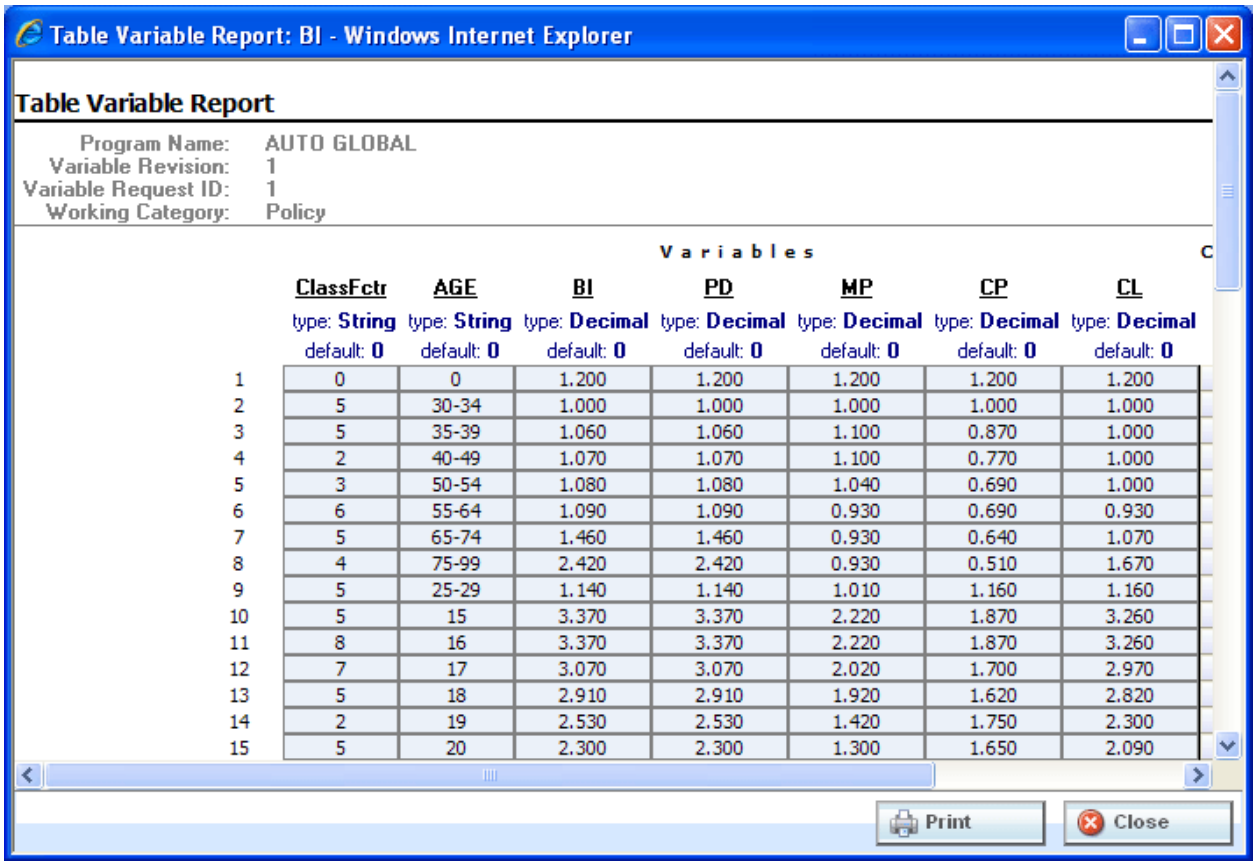
Viewing a Report

There are two ways to view a report. The first is to use the **Preview Window** at the bottom portion of the screen. The preview window can be either shown or hidden. When shown, the preview window will update to show the currently selected variable, algorithm or scenario. To hide the preview window, click Hide Preview Window.

The other option is to right click a variable, algorithm or driver assignment and select **View Quick Report** from the menu.

The report will load in a separate screen and may be viewed or printed.

- **View Quick Report (All Data)**: This option is only available on table variables and shows all table data associated with the variable. The report returns a maximum of 10,000 rows.



	ClassFctr	AGE	BI	PD	MP	CP	CL
	type: String	type: String	type: Decimal	type: Decimal	type: Decimal	type: Decimal	type: Decimal
	default: 0	default: 0	default: 0	default: 0	default: 0	default: 0	default: 0
1	0	0	1.200	1.200	1.200	1.200	1.200
2	5	30-34	1.000	1.000	1.000	1.000	1.000
3	5	35-39	1.060	1.060	1.100	0.870	1.000
4	2	40-49	1.070	1.070	1.100	0.770	1.000
5	3	50-54	1.080	1.080	1.040	0.690	1.000
6	6	55-64	1.090	1.090	0.930	0.690	0.930
7	5	65-74	1.460	1.460	0.930	0.640	1.070
8	4	75-99	2.420	2.420	0.930	0.510	1.670
9	5	25-29	1.140	1.140	1.010	1.160	1.160
10	5	15	3.370	3.370	2.220	1.870	3.260
11	8	16	3.370	3.370	2.220	1.870	3.260
12	7	17	3.070	3.070	2.020	1.700	2.970
13	5	18	2.910	2.910	1.920	1.620	2.820
14	2	19	2.530	2.530	1.420	1.750	2.300
15	5	20	2.300	2.300	1.300	1.650	2.090

Figure 404 View Quick Report All Data

- **View Quick Report**: This option is for table and calculated variables, algorithms or scenarios. For calculated variables, algorithms, and scenarios, you will get a breakdown of steps and the variables used. For Table variables, the variables used and criteria will be displayed.

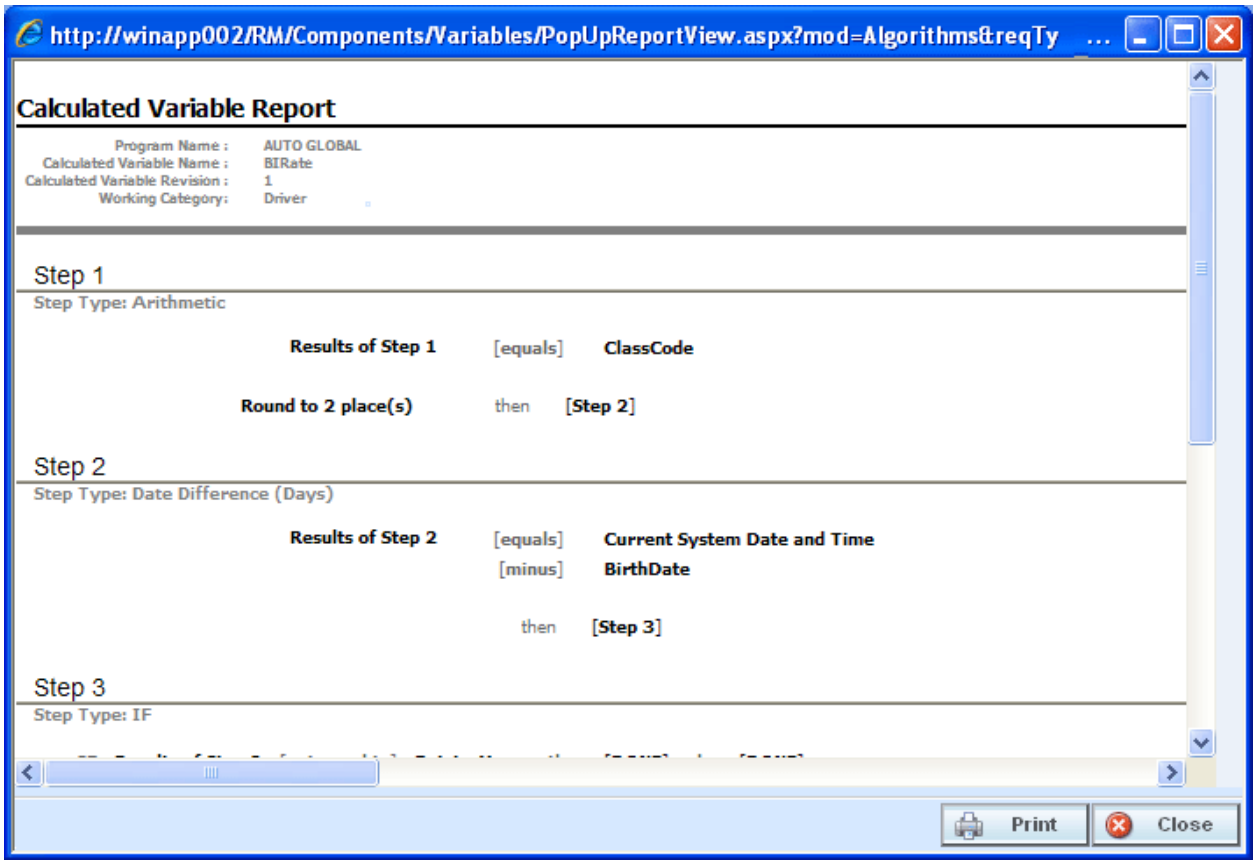


Figure 405 View Quick Report

VIEW REPORT

When you are in Edit mode for algorithms, calculated variables, table variables, and driver assignments, you can view the pertinent information for a result variable or an input variable by right clicking the variable. A popup will be displayed with the information you need, including Type and Category, allowing you to stay in Edit mode.

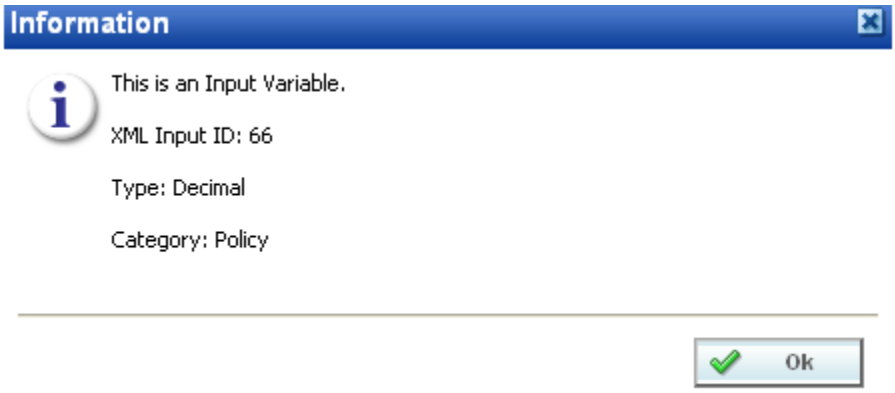


Figure 406 View Report

VIEW WHERE USED

View Where Used allows you to see if and where a variable or input is used in a program. The View Where Used Report will show all occurrences of the variable or input in other variables, algorithms, or result mapping, in all programs across the subline. You also can click through to further see where the variable or input is used in calculated variables or algorithms. The report will load in a popup window and may be viewed or printed.

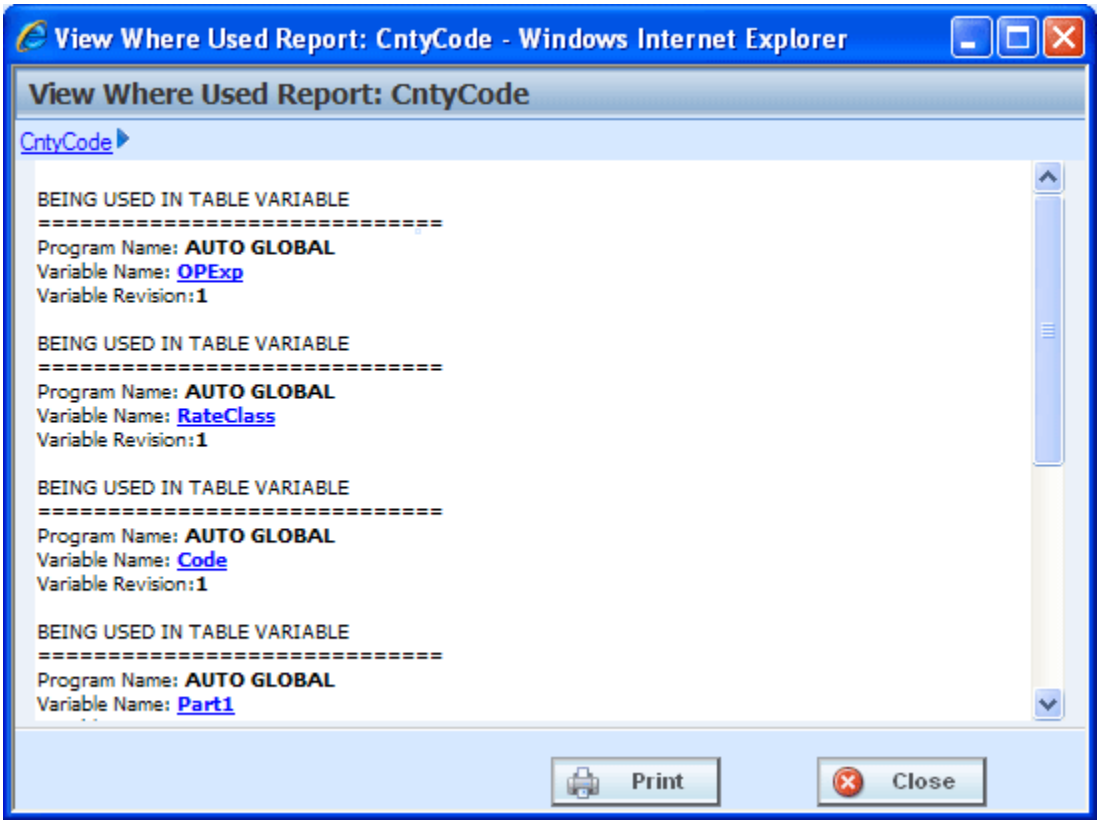


Figure 407 View Where Used Report

If a variable is being used in an Advanced Option, the instruction number will indicate the advanced option that is being used and not the step.

View Where Used Reports are not available on algorithms or constants.

Viewing a View Where Used Report

View Where Used is available when you right click a variable and select **View Where Used** from the menu. Click on any hyperlinked variable or algorithm to see the details. The pathway at the top of the screen displays your current location. Click any link in the pathway to return to that item.

Chapter 31

COMMON FUNCTIONALITY

There are some functions that can be performed in many different areas of the IBRU system such as:

- Locking
- Notes
- Change Control
- Constants

LOCKING

Locking can help to protect the integrity of your work and prevent other users from editing elements that you are currently working on. Locking also keeps templates from being altered. This will ensure that the original form of the template remains intact.

There are three types of locks in RateManager:

	Program Version Lock. The program version is locked and all elements contained within this program version are locked. Locked programs or elements are not open for editing. A lock icon indicates that this program or element is locked by a program and is not open for copying, editing or deleting. If the element is locked because the program is locked, you must return to the program and unlock it. This will unlock the element and changes can be made.
	Template Lock. This program version was created from a template. All elements contained within this template version are locked by default. If the element or program is locked because it came from a template, you will not be able to unlock it. You can create a new element or program if necessary.
	In-Use. Elements or programs that are in use are currently being worked on by another user in the system or that you have open in another tab are not open for editing, copying, or deleting. The element or program will be available when the user exits.

Different locks have different properties. A program version lock will close the program version and all associated elements to any changes, additions or deletions. New program revisions can be created, copied, and exported regardless of locking.

A template lock will not allow changes to the element versions that are being used, but new elements and new element versions can be created, changed and deleted.

Only one type of lock icon will be displayed even though more than one kind of lock may be used. A template program can be locked at the program version level. This combination will use the template lock icon with the Version Locked banner.

Notes can be added to any locked element or locked program version at any time.

IN-USE LOCKS

In-Use locks are temporary locks put on an element to indicate that another user is currently editing this element. In-Use locks will lock out other users while you are editing the element. This prevents other users from making changes that you may not be aware of or that do not need to be made.

An element will be locked automatically when you enter the edit tab. The element will be unlocked when you exit the edit tab, not when you save.

An element will display the lock icon of the active revision. For example, if you have a variable with two revisions and revision 2 is the active revision. When you edit the active revision: revision 2, the red element lock icon will be displayed by the variable name and the revision you are editing. If you edit the non-active revision, a lock icon will be displayed next to the revision you are editing and not next to the variable name.

Single elements such as categories, input variables, result variables, program sequencing, and result mapping will be closed to editing when a lock is in place. Revisioned elements, such as table variables, calculated variables and algorithms will have the selected revision closed to editing when a lock is in place. This means that if revision 1 is locked, revision 2 may be open for editing. If only one revision exists, the element is locked from any further editing, deletion or copying.

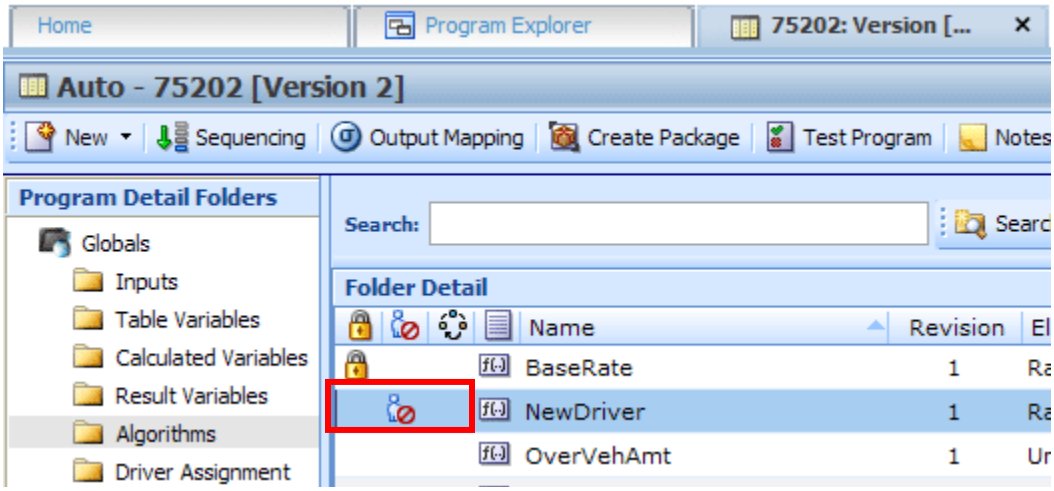


Figure 408 In-Use Locking on an Element

Any open element can have an element lock placed on it when a user goes to edit it. An element lock will be placed on the element you are currently editing. If you are editing an algorithm and open up a new tab to look at inputs, the algorithm you are editing will display an In-Use lock until you close the editing tab.

Elements that are locked by a program lock or a template lock will not be open for editing.

Releasing an In-Use Locked Element

Hover your cursor over the In-Use lock icon to identify the user who is editing this element and how long they have been editing it.

If an element has been locked for an extended period of time, please contact your system administrator. The system administrator can release the element from the user who is editing by ending their session.

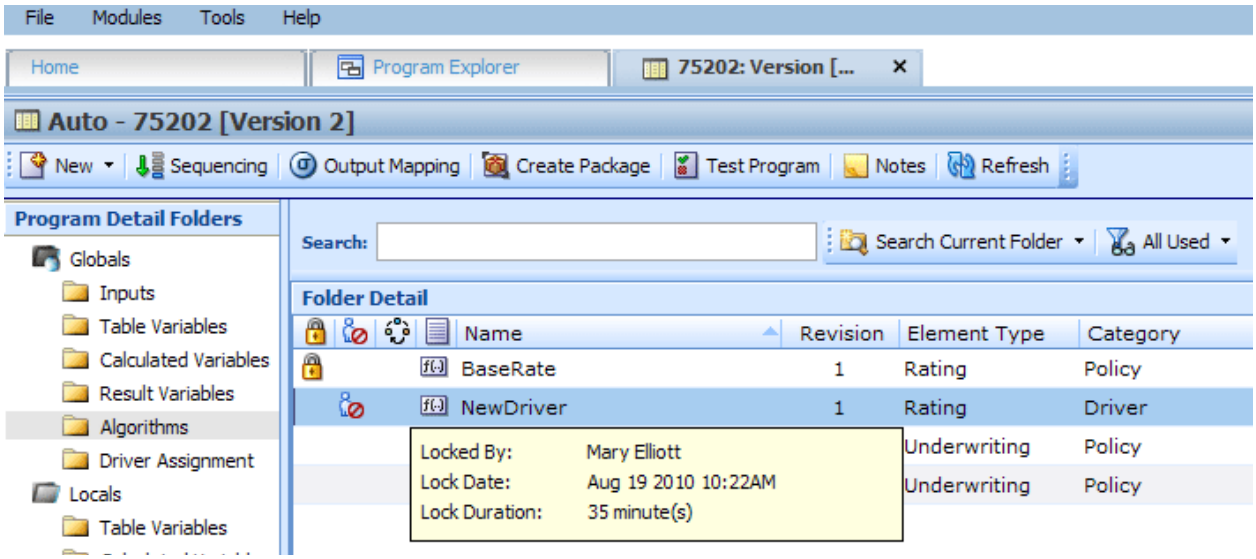


Figure 409 In-Use Message

If you attempt to open a locked element, a message will be displayed. The message will let you know who is editing the element and how long the element has been locked.

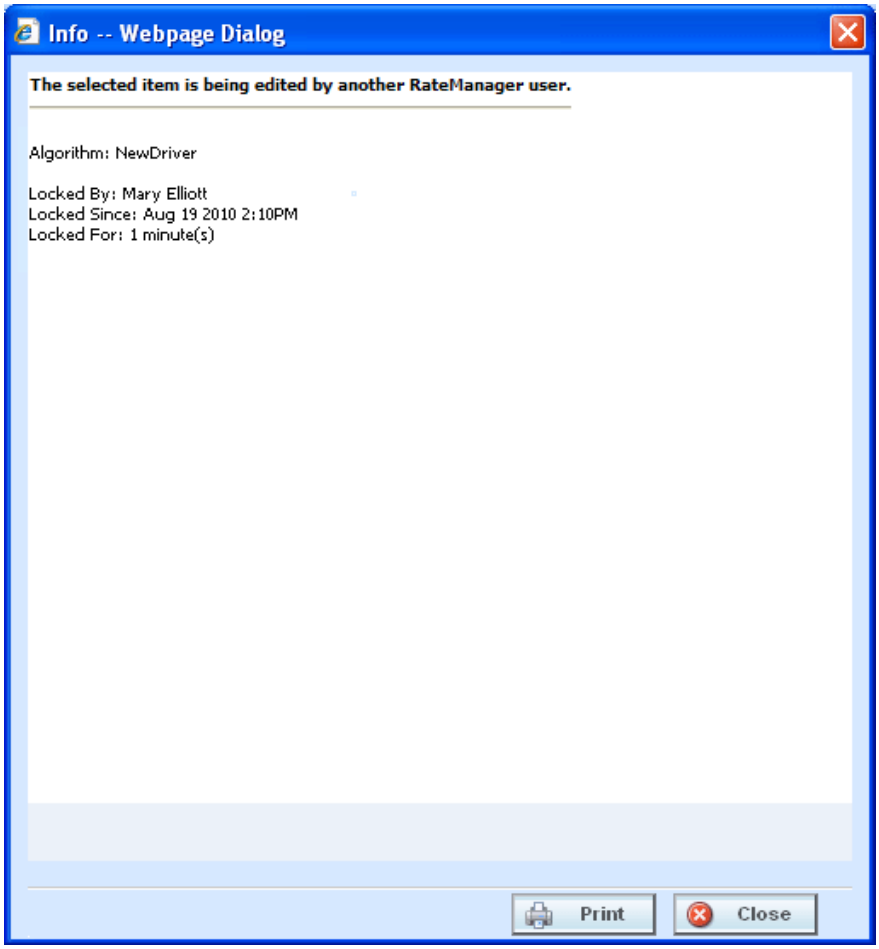


Figure 410 In-Use Lock Information

PROGRAM VERSION LOCKS

An administrator can lock a program version to prevent it from being changed or deleted. This will lock all the selected versions of the Variables, Algorithms, and Driver Assignments elements plus the Sequencing and Result Mappings used in this program version. The element versions will be locked throughout the subline based on the last packaged date. Changes to these element versions in this subline will not be allowed, regardless of what folder or program version you are working in. Locking a version will not affect other sublines.

For example, you have an auto program with three versions. Program version 1 uses version 1 variables, algorithms and driver assignments. Program version 2 uses version 2 variables, algorithms and driver assignments. Program version 3 uses version 3 variables, algorithms and driver assignments. If you lock program version 2, all version 2 variables, algorithms and driver assignments will be locked in all three program versions. You will not be able to edit or delete any of these element versions in any program in the subline. Elements in program versions outside of the version that has the lock applied will be open for copying. Elements that are locked in version 2 will not be open for copying. The same elements in version 3 will be open for copying.

On The Program Details tab there will be a program lock icon indicating which items are locked at the program version level. Locking a program version will also lock the associated Global Categories, Inputs, Variables, Algorithms, and Driver Assignments throughout the subline. Lock icons will not be displayed on the Program Explorer tab.

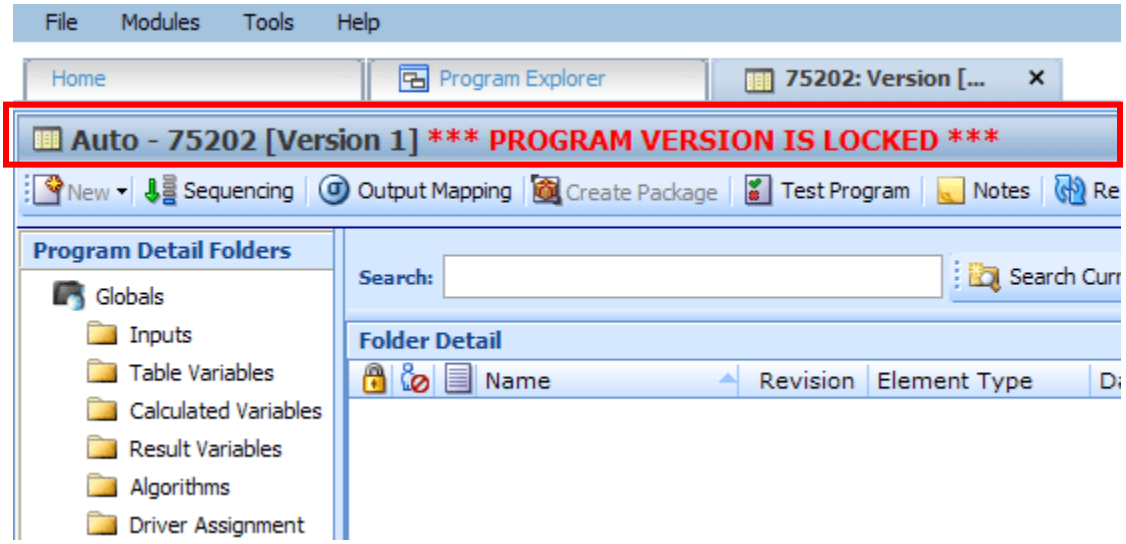


Figure 411 Locked Program Version Banner

When you enter a program version that is locked, a **VERSION LOCKED** banner will be at the top of the tab. Other versions in that subline will not have the banner but will have the lock icons indicating the locked items.

Locking a Program Version

1. Navigate to the **Program Explorer** tab. Select the subline, folder, and program that contains the program version you want to lock.

2. Place a check in the **LOCK** checkbox for the version you want to lock.

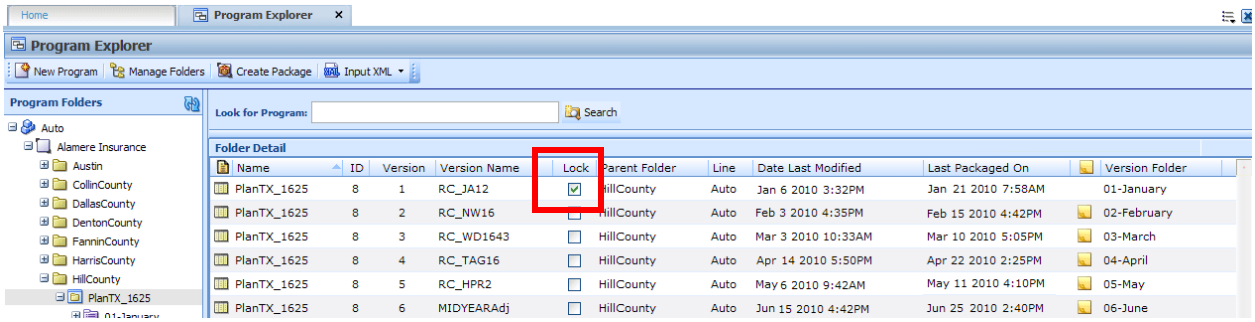


Figure 412 Selecting a Program Version to Lock

3. A message will be displayed. Click **OK**. This version is now locked.

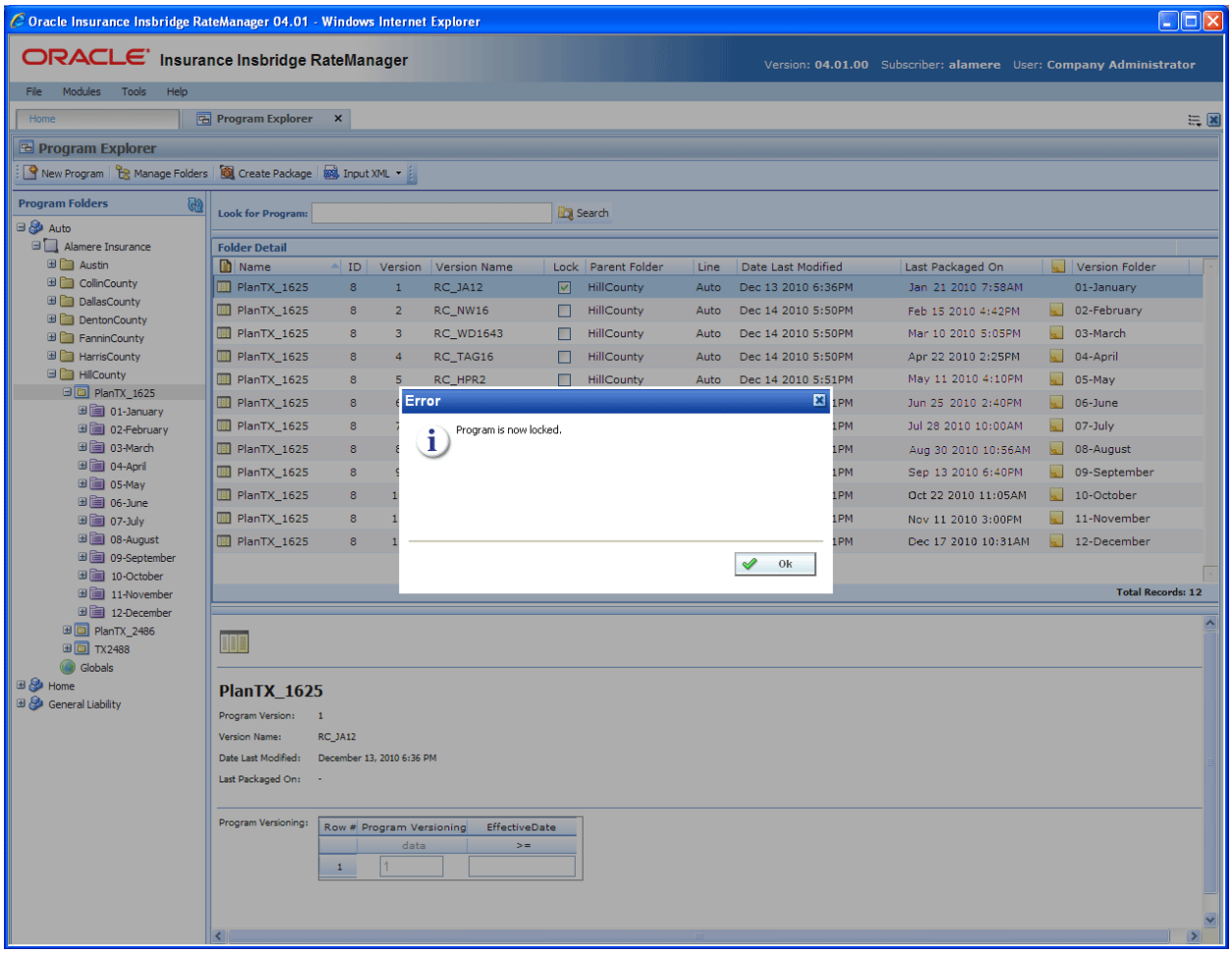


Figure 413 Locking a Program Version

You will not be able to make any changes to the version or to any associated items while it is locked. If you try to edit, a message will be displayed telling you the item is locked.

Only program versions that have been packaged can be locked. If you have made changes to the program or if you packaged the program a while ago, you should package before locking.

Your screen and right click menu options will change when a program lock is put in place.

- The New, Delete, and Create Package options along with the Copy, Show/Hide Revisions and Delete options will be removed from the right click menu of the program elements.
- Result groups will have the New Group and Copy Group options removed. Edit Groups will have the Save option removed.
- Program Sequencing will have the Save Sequencing and Change Sequence Order removed.
- Notes can still be added to a locked program version.

Unlocking a Program Version

Unlocking a program version will free up all items for editing and deletion. You must unlock a program before you can package it or reconcile.

1. Navigate to the **Program Explorer** tab. Select the subline, folder, and program that contains the program version you want to unlock.
2. Remove the check in the **LOCK** checkbox for the version you want to unlock.

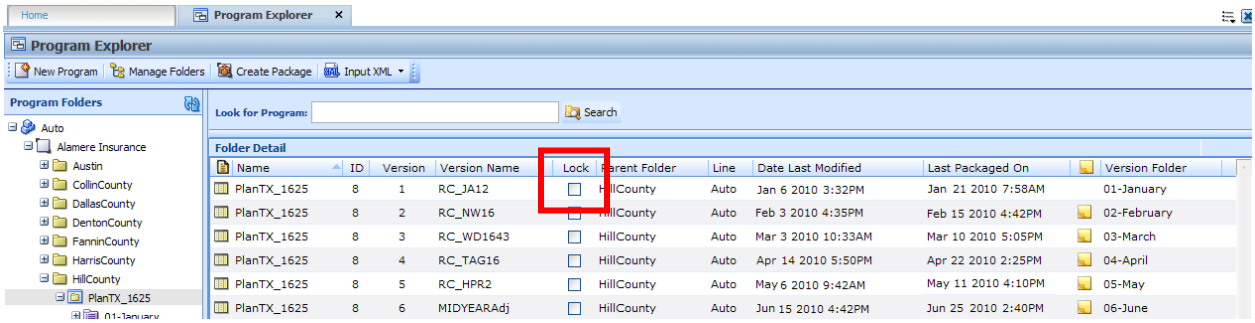


Figure 414 Selecting a Program Version to Unlock

3. A message will be displayed. Click **OK**. This version is now unlocked.

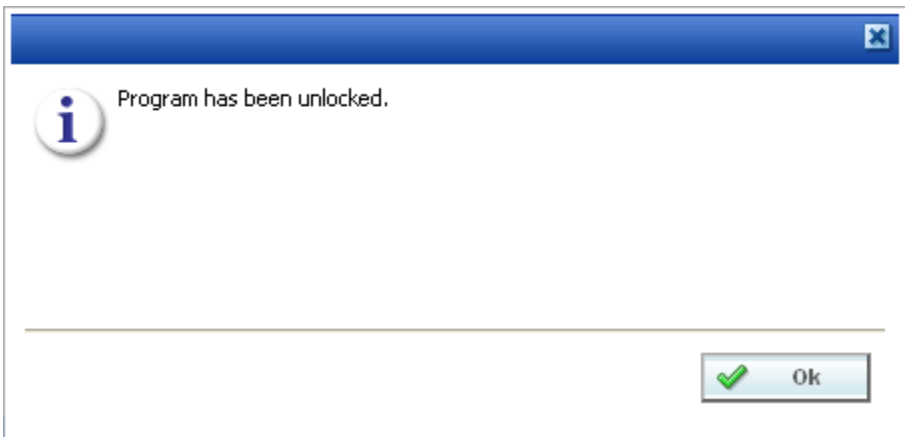


Figure 415 Unlocking a Program Version

TEMPLATE LOCKS

Template locks are automatically applied to any template brought into RateManager from the Library. A template lock will lock all elements of the program from any changes. A template lock does not prevent the program from being packaged or reconciled. A template lock cannot be removed.

Single elements such as categories, input variables, result variables, program sequencing, and result mapping will be closed to editing or deletion by a template lock. Revisioned elements, such as table variables, calculated variables and algorithms will have the selected revision closed to editing or deletion by a template lock. There will be a template lock icon, indicating which revisions are locked. If the active revision is locked by a template lock, the element name will have a template lock icon also.

Even if the active revision changes, the template locked revision cannot be edited or deleted. You will be able to add new elements. The new elements will not have a template lock. You will be able to edit or delete as needed.

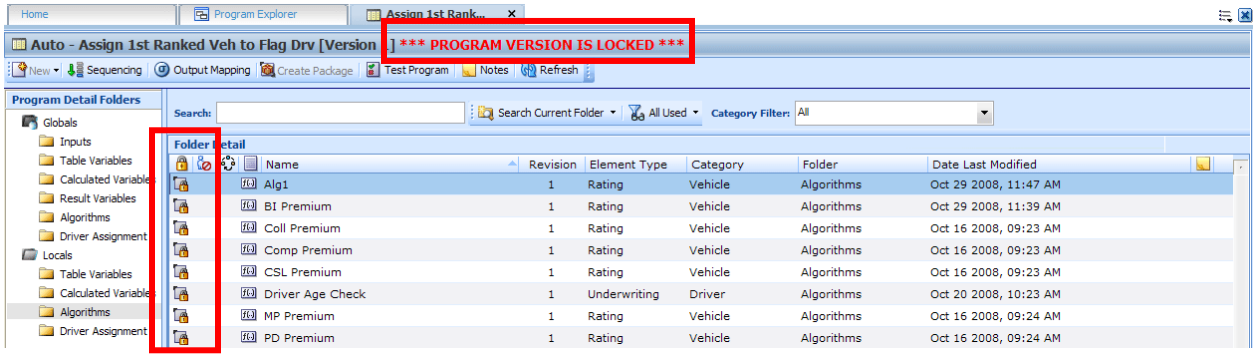


Figure 416 Template Locks

Notes can be added to a template locked element at any time.

To prevent any additions to a template program, you can lock the program. The Version Locked banner will be displayed at the top of any template program that is locked.

NOTES

Notes allow for explanations or comments to be added to an element or a program version. These are optional entries that can be added to program versions, variable revisions, algorithm revisions, sequencing, result mapping, categories, and inputs. Notes can be added from many screens throughout RateManager.

From the main notes screen, you can add, edit, or delete a note. You can enter as many notes as you need at any time you want. On the active elements of a program locked version, notes can be added, edited or deleted.

When an element or program version has a note, the notes icon will be displayed towards the end of the program version or element. The notes icon will not be placed at the program level, only at the version level. The notes icon will be displayed at the element level, but only if the active revision has a note. If only a non-active revision of an element contains a note, the notes icon will not be displayed at the element level.

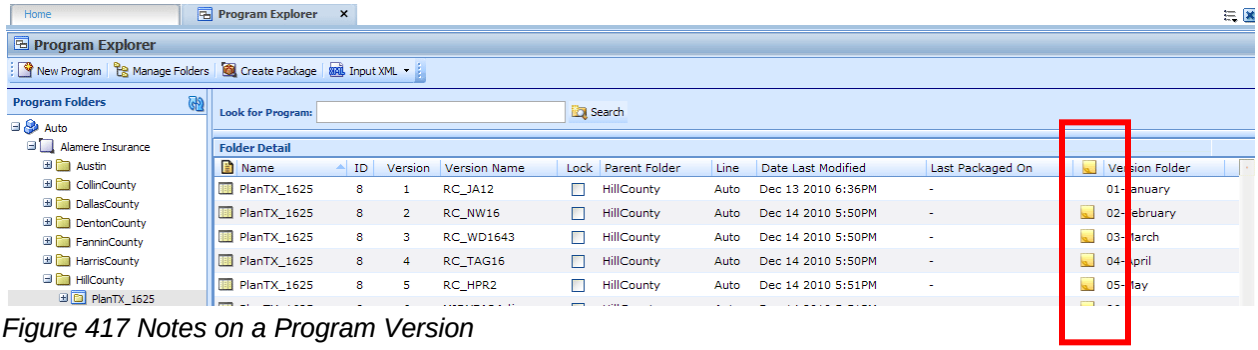


Figure 417 Notes on a Program Version

To view the note, highlight the element and click NOTES. Notes will be displayed in a separate screen.

- Notes placed on global elements and linked variables will be carried through to all instances of the element revision or linked variable revision. This means that if you enter a note on revision 1 of a variable that is linked to 10 others, the note will be displayed on revision 1 of each of the linked variables. Likewise a note entered on a global variable will be displayed on that variable throughout the subline.
- Program versions must be selected for a note. You will not be able to enter a note at the program level. You must select the version where you want the note placed.
- Elements do not have to have a specific revision selected. Elements will default to the active revision. If you select a variable, but not a specific revision, the note will be placed on the active revision. If you want to place a note on a specific revision, you must select the revision and add the note there.
- Notes entered on revision one will not be displayed on revision 3 of the same element. If the same information needs to be on all revisions, you will have to enter a note on all revisions.
- Copying a program version or creating a new version will automatically create a note on the new version with details regarding where the new program version was copied or created from.
- Notes are not carried through to copied programs or elements. Only the original program version or element will contain the notes.

NOTE: *Notes are not carried through to packages.*

Adding Notes

Notes can be added at any time. A note can contain up to 200 characters including spaces. Certain special characters will be restricted:

Name	Character
Ampersand	&
Asterisk	*
Backslash	\
Greater-Than Sign	>
Less-Than Sign	<
Question Mark	?
Quotation Mark	"

All other characters will be allowed.

When you enter your note, you will be able to type a note in directly or you can paste a note in from an outside source. Be aware that you may type or paste in more than 200 characters, but the note will only save the first two hundred. Any extra characters will be cut off. You cannot save a blank note.

1. Click NOTES and the main notes screen will be displayed.

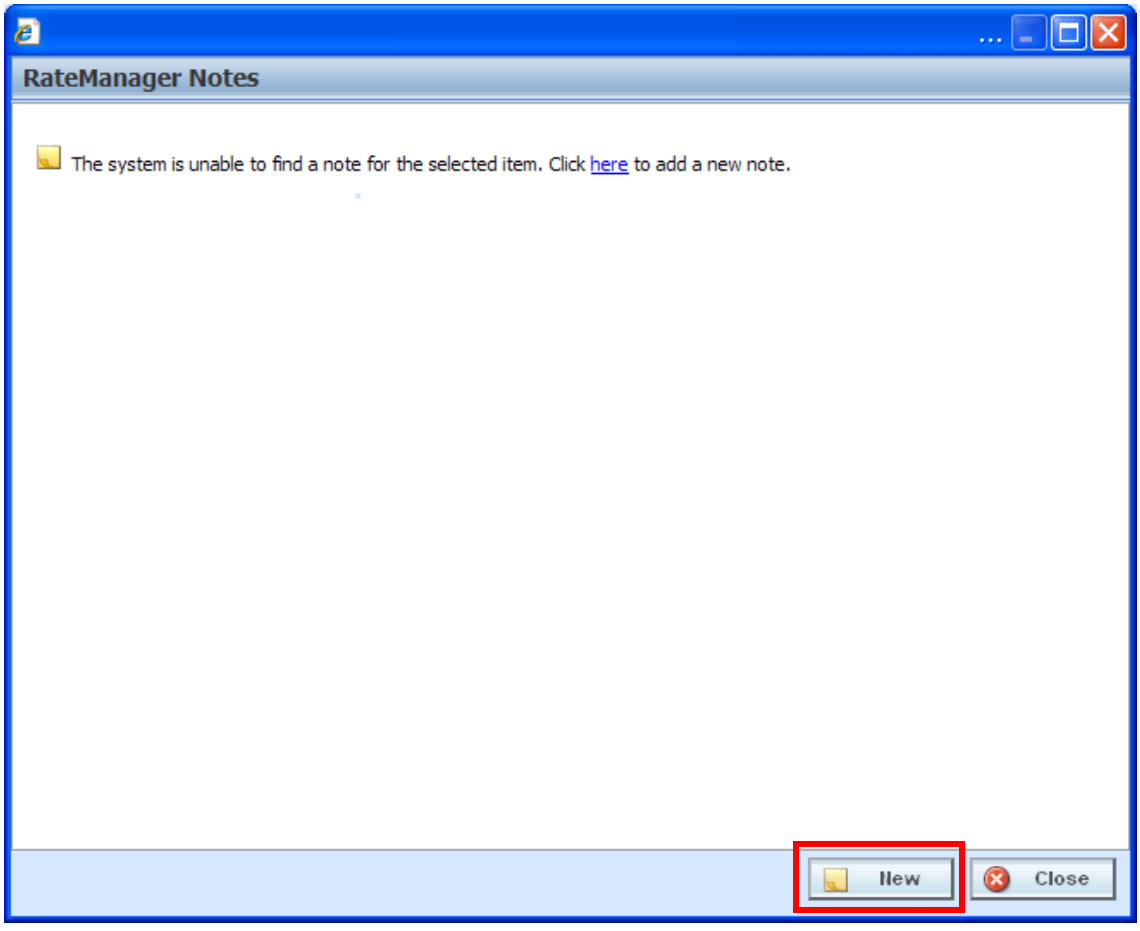


Figure 418 Adding a Note to the Main Notes Screen

2. The *Main Notes Screen* holds all the notes and change controls entries that have been made on this element or program version. Notes are listed in date order of newest to oldest with the newest note first. If no notes have been entered, the screen will have the option to enter a new note. You can click the hyperlinked here or click **NEW**. The notes details screen will be displayed.

3. The *Notes Detail Screen* contains the details of the note and/or any attachments. Enter your **Note** and/or attachment.

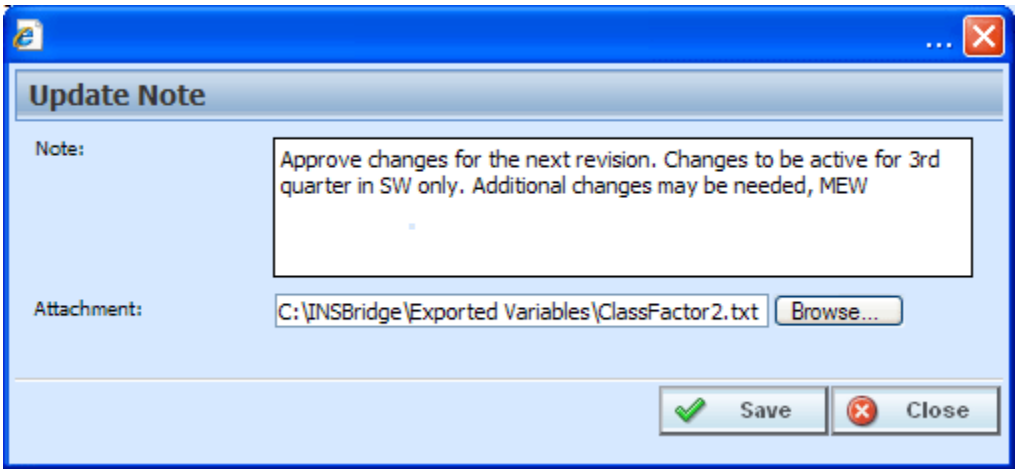


Figure 419 Completing the Notes Detail Screen

4. Click **Save**. The notes detail screen will close and you will be returned to the main notes screen. Your note will be listed.

NOTE: *You must click Save if you want to save the note. Clicking **CLOSE** on both the Main Notes screen and the Notes Detail screen will close the screen without saving the note.*

5. Enter any additional notes, if needed.

6. When you are finished, click **Close** to close the screen.

FIELDS

A blank Notes screen will have two buttons, New and Close. A populated Notes screen will also allow for editing and deleting. The Notes Detail screen has Save and Close.

New	**New:** Opens a Notes Detail screen where you can enter and save your note.
Close	**Close:** Closes the screen. If you have not saved your note entry, this will close the screen without saving any additions or changes.
Save	**Save:** Saves your entry.

	Edit: Opens the selected entry for editing. The notes will be saved under the new date and time. Change Controls cannot be edited.
	Delete: Removes the selected entry.

Attaching Files

You can place attachments on a note. Attachments can be MS Word documents, MS Excel spread sheets or Adobe Acrobat PDF files. Other files types will result in an error message being displayed. File names are limited to 25 characters. If your file name has more than that, any extra characters will be cut off.

NOTE: *You can attach one file per note. If you need to attach more than one document, you will need to create a new note for each document you need to attach.*

1. To attach a file, on the notes detail screen, click **BROWSE…**, this will pull up your computers dialogue box.

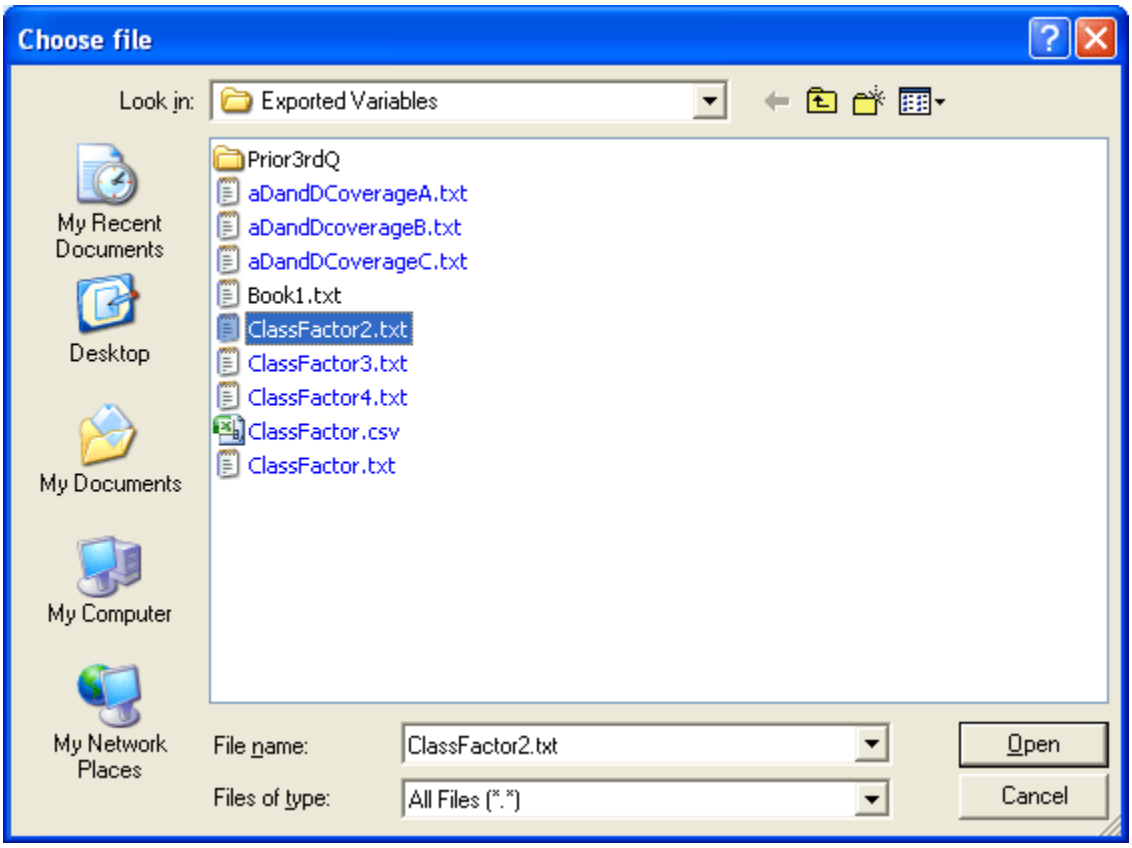


Figure 420 Dialogue Box

2. Find your file and click **Open**. This will close the dialogue box and return you to the notes detail screen.

3. Your file will be displayed in the Attachment field. Attachment file size is limited to 10MG per file.

Each note will hold one attachment. There is no limit on how many files you place in the notes area.

4. Attachments must have an entry in the **Note** area.

5. When you are finished, click **Save**. The notes detail screen will close and you will be returned to the main notes screen. Your note and attachment will be listed.

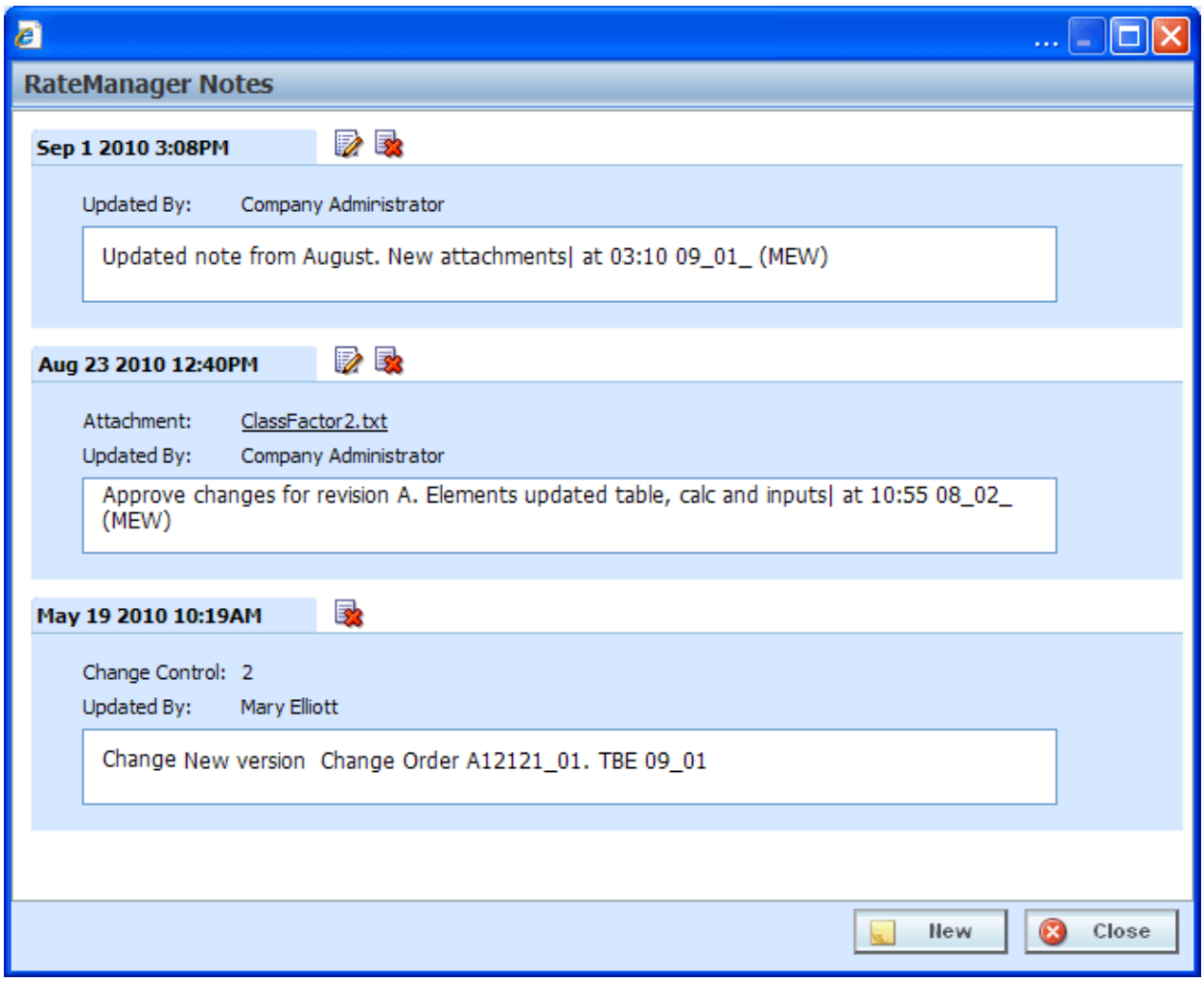


Figure 421 Completed Notes Screen

6. Enter any additional notes, if needed.

7. When you are finished, click **Close** to close the screen.

NOTE: *Certain file types will be denied, such as exe, com, vbs, or dll. If you try to attach a document with this file extension, the command will be denied.*

Viewing Attachment Files

After you have saved the note, you will be able to view the attachment. Click the attachment file you want to view. Your attachment will be displayed in a separate window, depending upon file type. Word documents will be displayed in MS Word, excel documents will be displayed in MS Excel, and PDF documents will be displayed in the Insbridge document viewer. These documents are read-only. You may be able to do a "Save-As" copy to your local hard drive but any changes you make will not be made to the attachment on the note.

If the attachment needs to be edited, you will need to go to the original source and edit there. For example, if you have uploaded a Word document, you will need to open the original file in Word, make your changes there and save the file. Then you can return to your note and reattach the updated file.

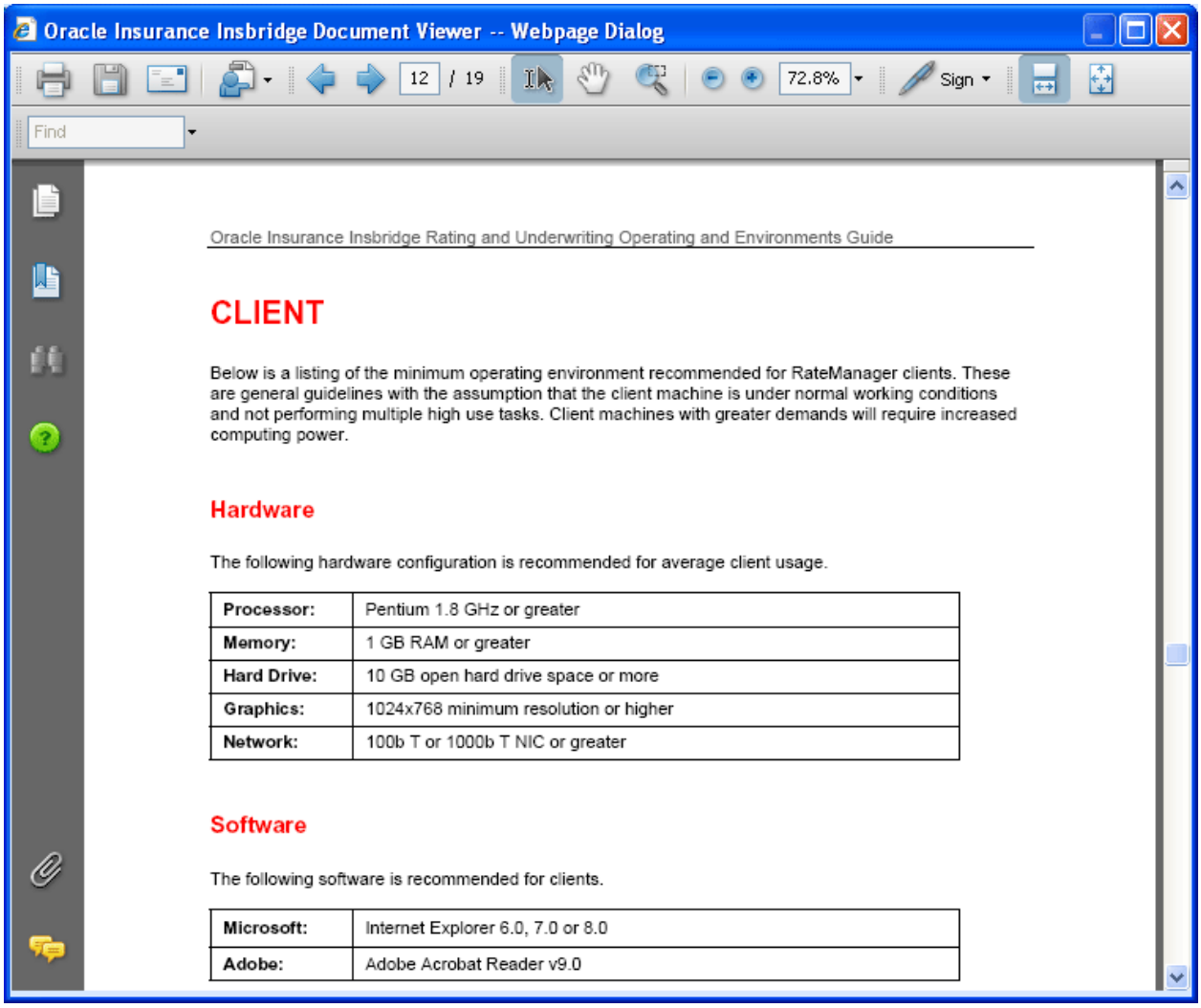


Figure 422 PDF File in the Insbridge Document Viewer

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.*

Remove Attached Files

Attachments cannot be deleted or edited. To remove an attachment, you can delete the entire note. If you would like to replace the attachment, you can edit the note and select another file. This will replace the first attachment.

Editing Notes

Notes can be edited at any time. You will not be able to replace or edit attachments. If you need to update or replace an attachment, you will have to delete the previous Note and create a new Note with the updated attachment.

1. Highlight the program version or element that contains the note you want to edit.
2. Click **NOTES** and the main notes screen will be displayed.
3. Click **EDIT** on the note you want to edit. The notes detail screen for that note will be displayed.

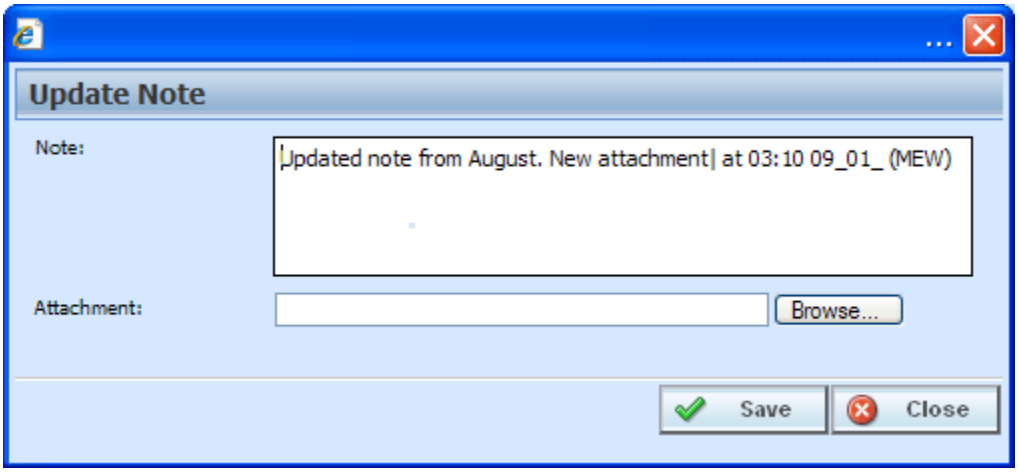


Figure 423 Editing a Note

4. Make your changes.
5. Click **Save** to save your entry and return to the main notes screen.
6. When you are finished, click **Close** to close the screen.

Deleting Notes

Notes can be deleted at any time. If you delete the last note, the notes icon will not be displayed on the program version or element. Deleting a Note will delete any attachments on the Note.

1. Highlight the program version or element that contains the note you want to delete.
2. Click **Notes** and the main notes screen opens.
3. Click **Delete** on the note you want to delete.
4. A warning message is displayed. Click **OK** if you want to delete the note. Cancel returns you to the notes detail screen without any changes being made.

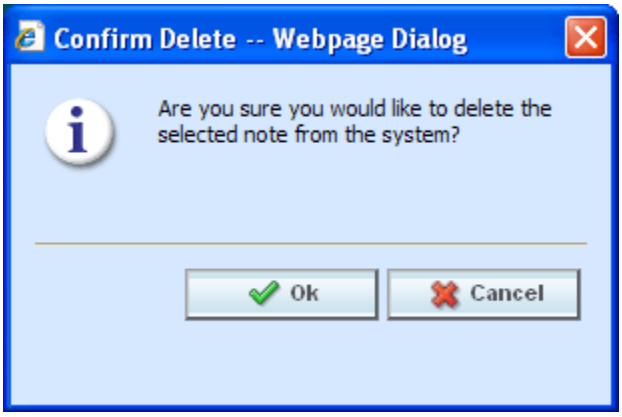


Figure 424 Deleting a Note

5. Click **Close** to close the screen.

NOTE: *Please take care when deleting notes. This action cannot be undone.*

CHANGE CONTROL

Change control allows for a tracking identifier and justification to be added to an element revision or a program revision. If change control has been activated, it will be mandatory to make an entry to any element or program when it is revisioned. If change control is not activated, the option will not be presented. Any program, table, linked or calculated variable, and algorithm that can be revisioned can require a change control entry. Change control will only be required at the time the program or element is revisioned.

- Change control uses the same screen as the notes feature. From the main notes screen, you can delete a change control. No additional change controls can be added.
- Change controls cannot be edited.
- Only one change control per revision is allowed.
- When an element or program revision has a change control, the notes icon will be displayed towards the end of the program or element revision. The notes icon will not be placed at the program level, only at the version level. The notes icon will be displayed at the element level, but only if the active revision has the change control. If only a non-active revision of an element contains a change control, the notes icon will not be displayed at the element level.
- Change controls entered on global elements and linked variables will be carried through to all instances of the element revision or linked variable revision. This means that if you enter a change control on revision 3 of a variable that is linked to 10 others, the note will be displayed on revision 3 of each of the linked variables. Likewise a change control entered on a global variable will be displayed on that variable throughout the subline.
- To view the change control, highlight the element and click NOTES. Your note will be displayed in a separate screen.

NOTE: *Change controls are not carried through to packages, copies or new revisions.*

Activating Change Control

System Administrators can activate Change Control on the Tools→Preferences→Administrator Web Settings. Select ON to activate Change Control. If change control is on, it will be mandatory for users to enter a change control entry and justification to any element or program when it is revisioned. If change control is off, the option will not be presented.

Adding Change Control

A change control will be added at the time the revision is created if required. The change control option must be turned on by an administrator. When activated, change control entries are mandatory. If the option is deactivated, no change control option will be presented.

A change control justification can contain up to 200 characters including spaces. Certain special characters will be restricted:

The Change Control fields restrict:

Name	Character
Ampersand	&
Asterisk	*
Backslash	\
Greater-Than Sign	>
Less-Than Sign	<
Question Mark	?
Quotation Mark	"

All other characters will be allowed.

When you enter your change control, you will be able to type the justification directly in or you can paste a justification from an outside source. Be aware that you may type or paste in more than 200 characters, but the justification field will only save the first two hundred. Any extra characters will be cut off. You must make an entry. Blank change controls are not allowed.

1. Click the element or program where you want to create a new revision.

2. If change control is required, a separate screen opens.

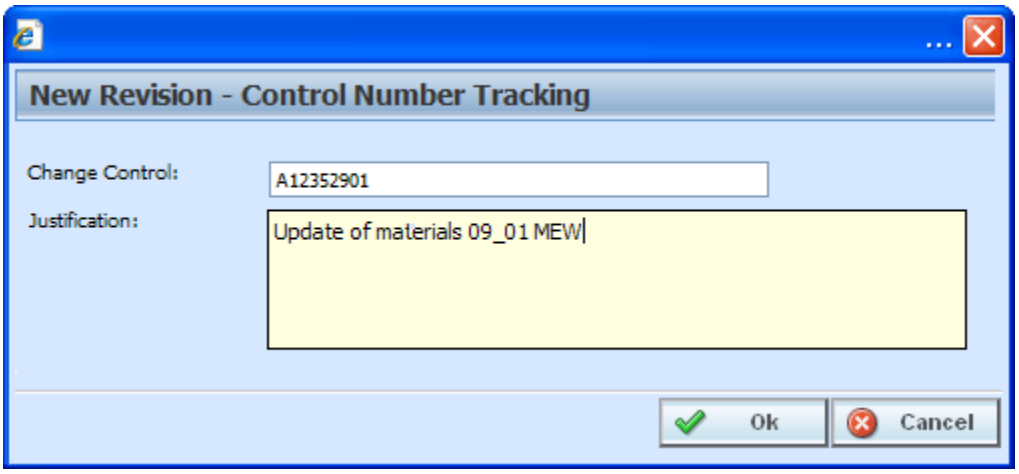


Figure 425 Change Control

3. Enter the change **control tracking ID** and the **justification**.

NOTE: *Verify your entry before saving. Change controls cannot be edited.*

4. Click **OK**. The change control screen closes and you will be placed on the revision details screen for the element or program version.

5. When you complete your revision, your change control is listed on the notes screen for that revision. Notes may be added after the revision has been created. Notes are listed in date order of newest to oldest with the newest note first. The change order will be the oldest item on the notes screen.

Deleting Change Control

Change controls can be deleted at any time. If the change control is the only item on the notes screen and you delete it, the notes icon will not be displayed in front of the program version or element.

1. Highlight the program revision or element revision that contains the change control you want to delete.
2. Click **Notes** and the main notes screen will be displayed.
3. Click **Delete** on the change control you want to delete.
4. A warning message will be displayed. Click **OK** if you want to delete the change control. Cancel will return you to the notes detail screen without any changes being made.

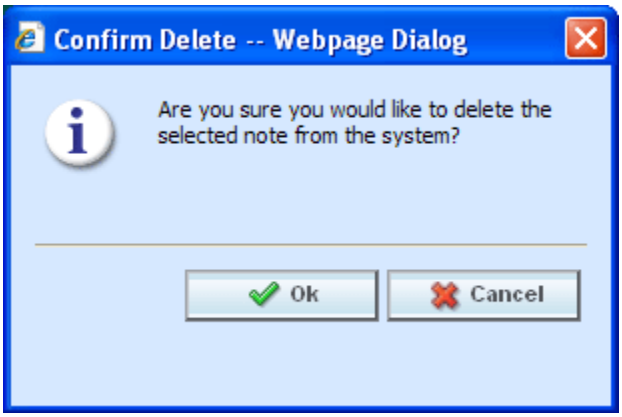


Figure 426 Deleting a Change Control

5. Click **Close** to close the screen.

NOTE: *Please take care when deleting change controls. This action cannot be undone.*

CONSTANTS

Constants can be used in table variables, calculated variables, algorithms and drivers assignments.

There are three types of constants in RateManager:

- **Fixed:** These constants have a fixed value. 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 100, 1000, 10000, Y, YES, N, NO, and NULL. The value of these constants cannot be changed. If you want a different value, you can use a Custom Value or create an input with that value.
- **System:** A system constant is a value that comes from the system. There are two system constants.
  - **Current Category Instance #**: This is the instance that the category is currently on. For example, you may have an auto program where you can enter multiple vehicles. Each vehicle would have its own instance in the vehicle category. If you limit personal auto to 9 vehicles, you may want to set a rule or trigger another action if the vehicle instance is 10.
  - **Current System Date and Time**: This is the current server time and date at the time of execution.
- **Custom Value:** A custom value is a fixed value that you created. For example, if you wanted to use .5 in an arithmetic step, you could create a custom value for that purpose. The custom value created will be for that step only. It will not be displayed with other constant values. If you want to use this value again, you will have to enter it in again. If this is a value that you will use frequently, you may want to create a variable using that value.

Adding a New Custom Value

A new custom value can be created while entering or editing a calculated variable, table variable, algorithm, or drivers assignment without leaving the edit tab.

There are two ways to enter in a custom value:

- Right click menu on an algorithm step input.
- Select **Custom Value** from the Constants menu on any table variable, calculated variable, algorithm or drivers assignment.

To Add a Custom Value

1. To create a custom value:
   a. Scroll down to the bottom of the constants menu options. Select **Custom Value**. The Custom Value popup is shown.
   b. Right click on an algorithm step input. Select **Custom Value**. The Custom Value popup is shown.

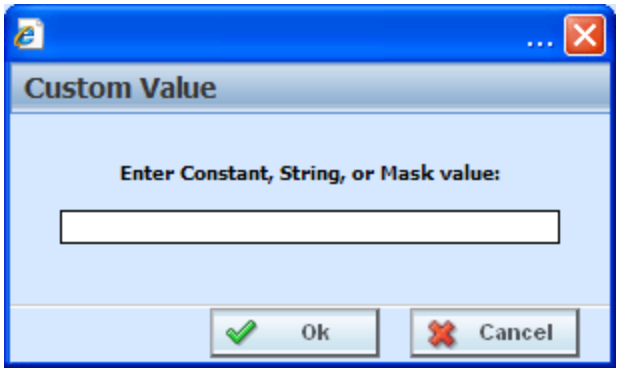


Figure 427 Custom Value Popup

2. Enter in a **Value**.
3. Click **Ok** to save your entry. The popup window closes and your new custom value will be populated in the input.

CONTACTING SUPPORT

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

Address any additional inquiries to:

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

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

TTY ACCESS TO ORACLE SUPPORT SERVICES

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

INTERNET EXPLORER SETTINGS

RateManager is a web application that requires certain permissions and controls in order to properly interact with your desktop and file system. You may need to change or adjust your Internet Explorer settings to fully utilize all of RateManager's features.

HOW SECURITY LEVELS AFFECT RATEMANAGER

Different security levels affect how RateManager functions. The basic security levels **(High, Medium, Medium-Low** and **Low)** affect RateManager in slightly different ways.

High RateManager will not function properly when security is set to **High.** Security must be **Medium** or lower.

Medium In the Testing module, you will only be able to rate files that are located on a network share, i.e. the file path must be of the form "\\server\folder\file.xml". Files located on your machine or on a mapped network drive may not be available. This is because RateManager uses an ActiveX control to access your file system. The **Medium** security level disables some ActiveX functionality. When rating a file, the Testing module will prompt you with a warning message to get the file from the server. You must click **OK** in order to rate the file.

Medium-Low RateManager functions the same as with the security setting of **Medium**.

Low In the Testing module, you will be able to rate files located on your machine, a mapped network drive or a network share.

Warning	In all cases Low security presents no prompt to the user, and all macros are allowed to run. When macro security is set to Low, certificates of trust attached to macros are not examined by the system and are not presented to the user for acceptance. Since the user is never prompted to accept or reject these certificates, they are not posted to the trusted Trust Publishers store for Office applications. If you use the **Low** setting, you increase your vulnerability even if you clear the **Trust all installed add-ins and templates** checkbox. **Note:** If the security setting is set to **Low**, Office applications will not warn you before running a macro, therefore, all macros are run without user intervention. Because of the potential security risk, Microsoft does not recommend using the **Low** setting. With no warnings, controls can be initialized or scripted regardless of data source or scripts.

To Change Your Internet Explorer Settings

NOTE: *These steps outline how to change your security settings in Internet Explorer 7.0. The steps are similar in Internet Explorer 8. If you are unable to change your security settings, ask your system administrator to change them for you.*

1. From an Internet Explorer browser, select **Tools→Internet Options...** from the file menu.

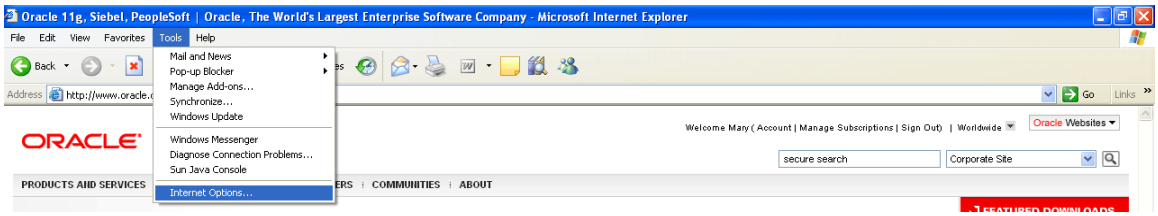


Figure 428 Changing Internet Explorer Settings

2. This will open the **Internet Options** window. Select the **Security** tab and then click the **Local Intranet** icon.

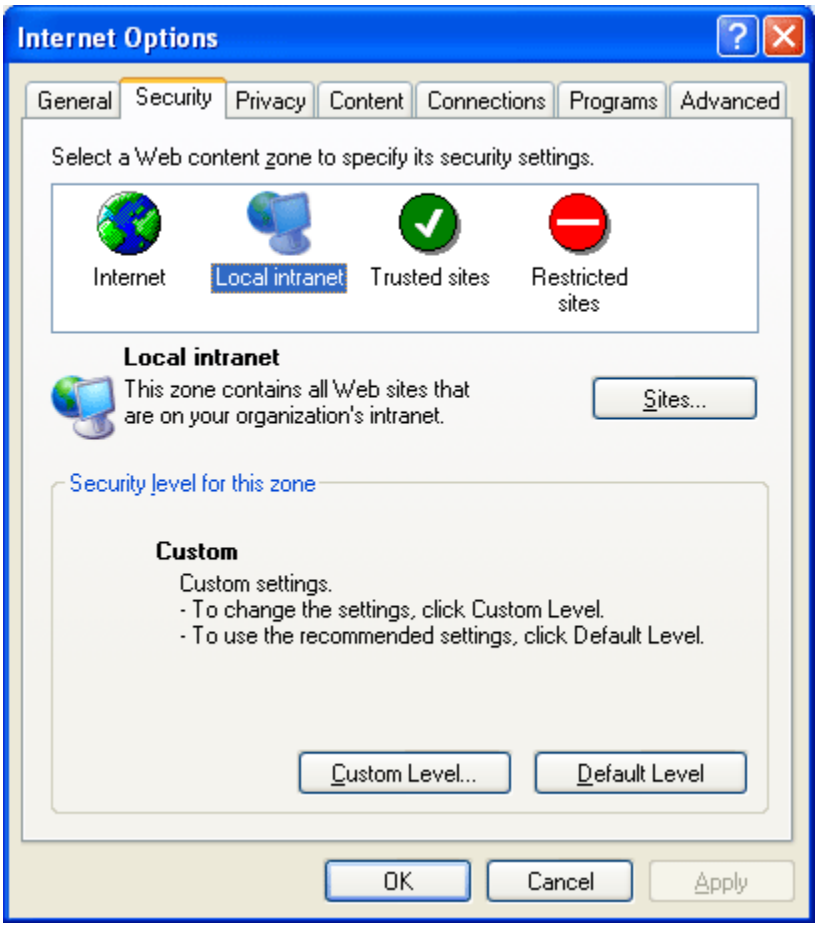


Figure 429 Setting Internet Options, Security

3. From here, you can do one of two things.

   - You can change the security level to **Medium, Medium-Low** or **Low** using the slider. If the slider does not show, click Default Level. If you choose this option, go to step 5. Also, see How Security Levels Affect RateManager for more information.
   - You can set the options manually. If you choose this option, continue with step 4.

4. To set the options manually, click Custom Level... This will open the **Security Settings** window.

5. Change the option "**Initialize and script ActiveX controls not marked as safe**" from Disable to **Prompt** or **Enable**. Select OK when you are finished.

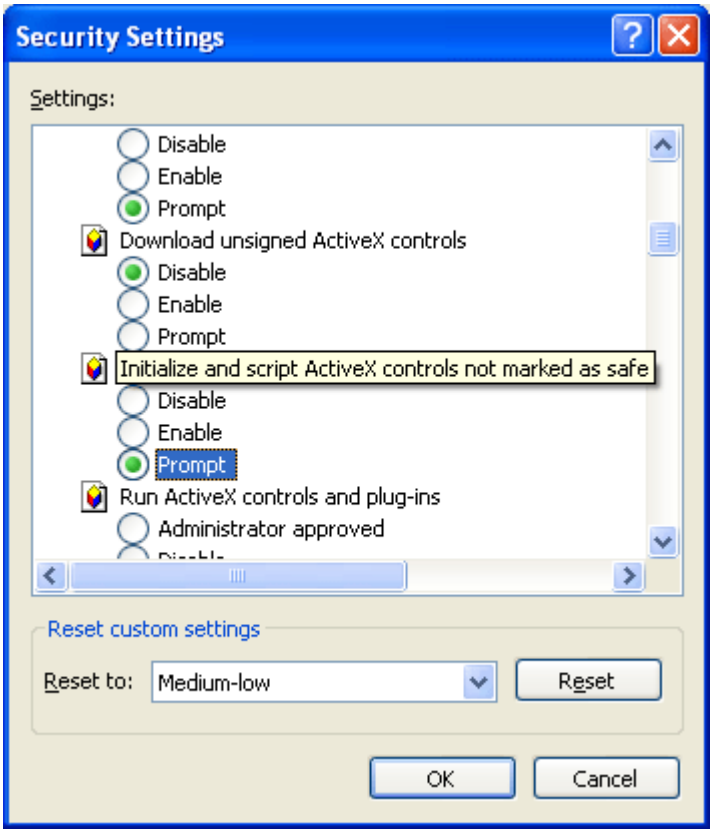


Figure 430 Setting Security Settings

6. Click the **Advanced** tab. Remove the checkmark, if there, next to **"Reuse windows for launching shortcuts".** Select OK when you are finished.

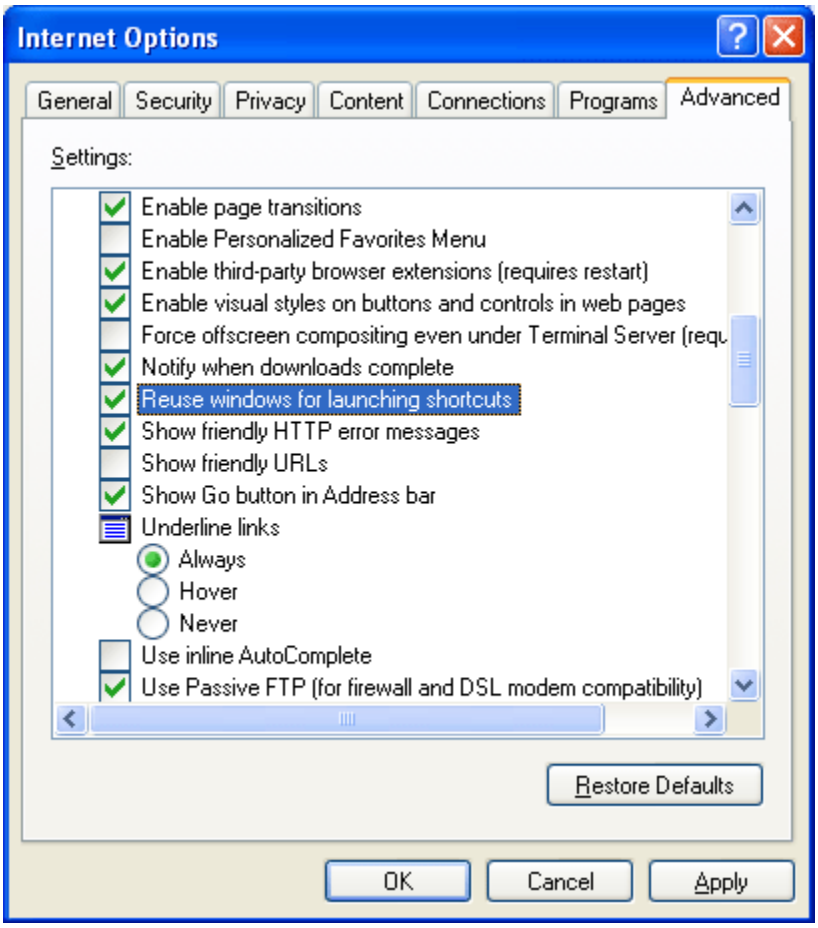


Figure 431 Setting Advanced Security Options

NOTE: *You may have to close out your browser for the new settings to take effect. Close all open browser windows and then re-open.*

IE 8

Internet Explorer 8 uses HTML5, which contains a file upload control that should not reveal the real local path to the file you have selected if you manipulate its value string with JavaScript. Instead, the string that is returned by the script, which handles the file information is c:\fakepath.

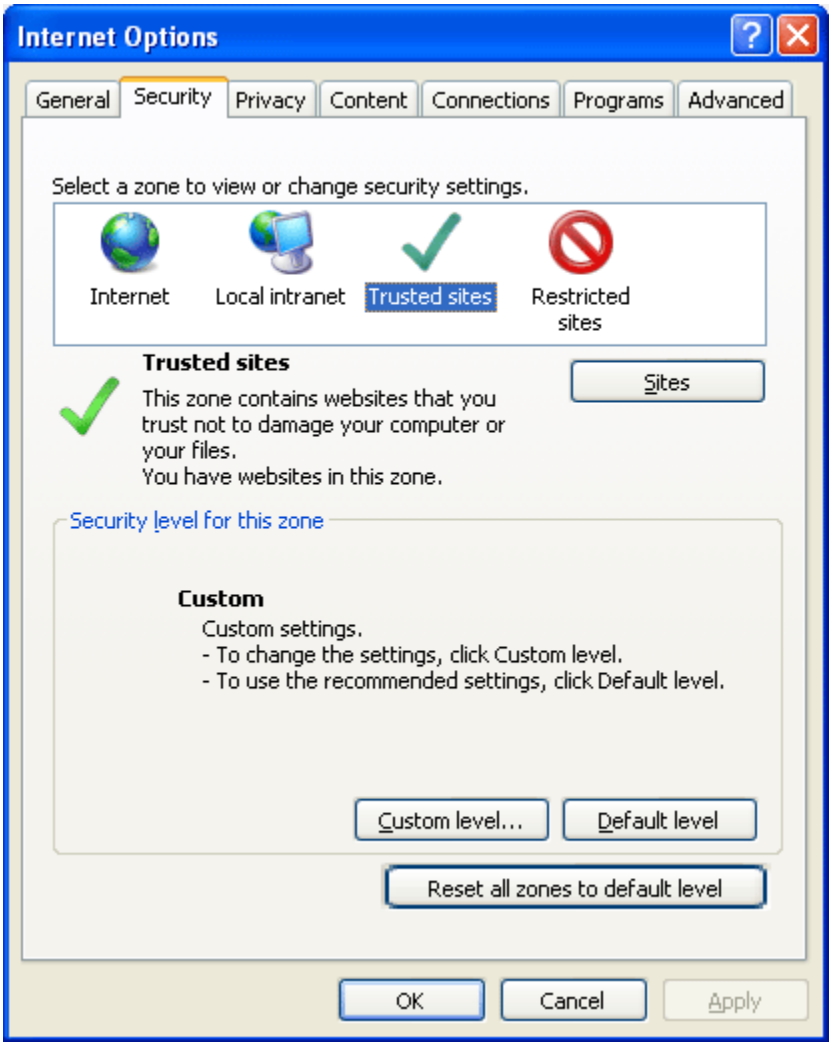
In Internet Explorer 8, the real path to the file will be shown only if the page that contains the control is added to the trusted sites collection of the browser.

This means that when using IE8, RateManager users who try to rate a file in the Testing Module, the Releases Module and the Impact Analysis Module may see the file path as C:\fakepath in the XML Input section of the page.

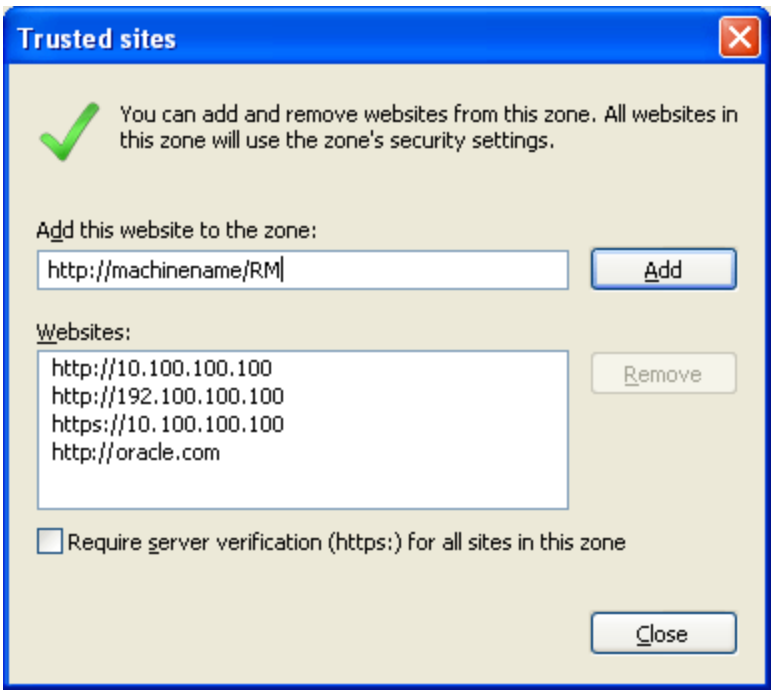
This may be resolved by adding Insbridge as a Trusted Site.

Adding a Trusted Site

1. Open an Internet Explorer window.
2. Click on Tools in the menu.
3. Click on Internet Options.
4. Click on the Security tab.
5. Click on Trusted Sites.



6. Click on the **SITES** button. A separate window will be displayed.



7. Enter in your Insbridge site. If you do not know your Insbridge site, ask your system administrator.
8. Click **Add**. The Insbridge site will be listed below.
9. Click **OK** on Internet Options to save your selections and close the window.

This will allow auxiliary screens from Insbridge to open.

Removing the URL Bar on RateManager

If the URL is displaying in your screen and you would like to remove it, you may want to add your IBRU site as trusted site and then enable the option to allow script initiated windows.

1. On IE, select Tools→Internet Options→Security.
2. Select **Trusted Sites**.
3. Click **Sites**. A separate screen will be displayed.
4. Add your IBRU site as a trusted site. You may need to uncheck the Require server verification (https:) for all sites in this zone.
5. Click **Close**.
6. Back on the Security tab, select **Custom Level**. This will open up a separate screen.
7. Scroll down to the Miscellaneous section.
8. **Enable** the option to *Allow script-initiated windows without size or position constraints*.
9. Click **OK** to save your changes here and then Click **OK** to save all your changes.

Failure to Display Popups

Popups are screens that automatically open when you click on a web site or a hyperlink. Popups frequently are annoying ads and many users do not want popups appearing on their system so they install popup blockers. Popup blocker programs will severely limit any type of auxiliary screen from being displayed. IBRU contains many information screens that are critical for users to view but are considered auxiliary screens by popup blocker programs.

You may not even be aware you have a popup blocker installed because popup blockers are included in newer versions of Windows many popular browser toolbars and other Internet service software.

NOTE: *If at any time you are unsure how to enable popups, please contact your system administrator.*

You can disable popups to allow for select content to be displayed.

Microsoft Windows XP

If you have installed Service Pack 2, then you have a popup blocker on your Internet Explorer.

To turn it off:

1. Open an Internet Explorer window.
2. Click on Tools in the menu.
3. Click on Internet Options.
4. Click on the Privacy tab.
5. Uncheck Block Popups.
6. Click OK to save your changes.

This will allow popups to be displayed.

Google Toolbar

The Google Toolbar is an add-on feature for Internet Explorer.

To disable the Google popup blocker:

1. Open an Internet Explorer window.
2. Click on Blocking Popups.
3. Select Site Popups Allowed.
4. Click OK to save your changes.

This will allow popups to be displayed.

NOTE: *You also can check your failed popups option and select to add Insbridge.*

If any of these solutions fail to produce the desired results, contact your system administrator for further assistance.

Using the Testing Module

In order to rate a file located on your machine or on a mapped network drive, either the security level must be changed to **Low,** or the security option **"Initialize and script ActiveX controls not marked as safe"** must be set to **Prompt** or **Enable.** See Internet Explorer Settings for more information.

If the security option **"Initialize and script ActiveX controls not marked as safe"** is set to **Prompt,** you may receive a message when you try to rate a file through the Testing module.

Clicking **Yes** will allow the Testing Module to get the file from your machine. Clicking **No** will prevent the Testing module from getting the file from your machine.

If you want to rate a file that is located on your machine and you clicked **No**, you will have to log out of RateManager and log back in, in order to be prompted again.

Clearing Temp Files

Because IBRU is a web-based application, you may need to clear out your browser's temporary file periodically. Keeping the temporary file clear may improve performance by clearing off space from your hard drive.

1. Open up a regular browser window, not a RateManager screen. On the top menu bar, click **Tools→Internet Options...**

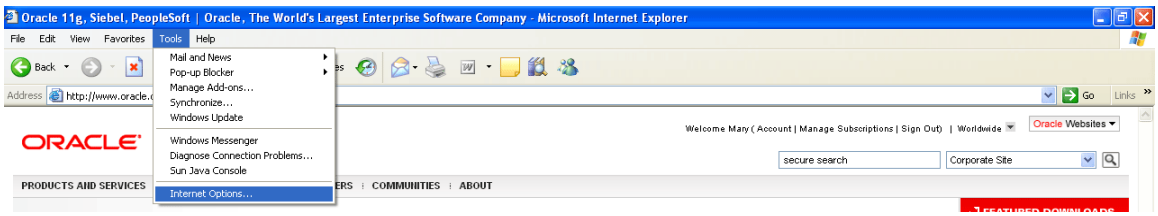
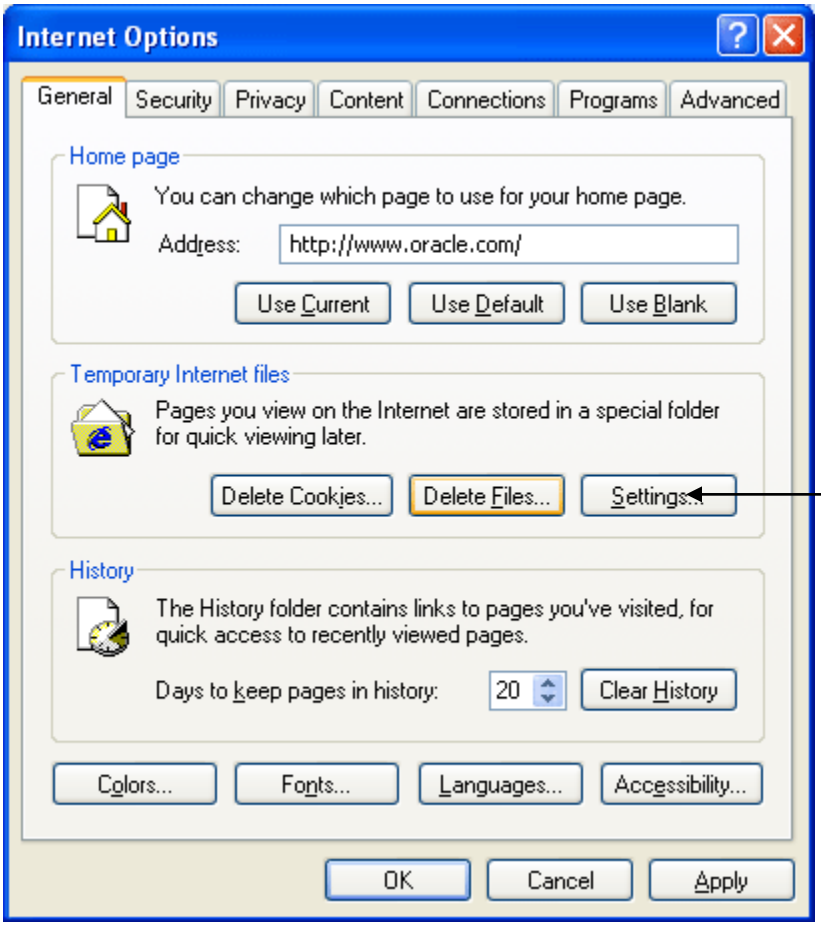


Figure 432 Browser Toolbar

2. Click Delete Files on the General Tab→Temporary Internet Files: located in the middle section.



To view your temp files or to define your temp file settings, click **SETTINGS**. This will open up an information screen where you can make any adjustments.

Figure 433 Delete Files

A warning message will appear.

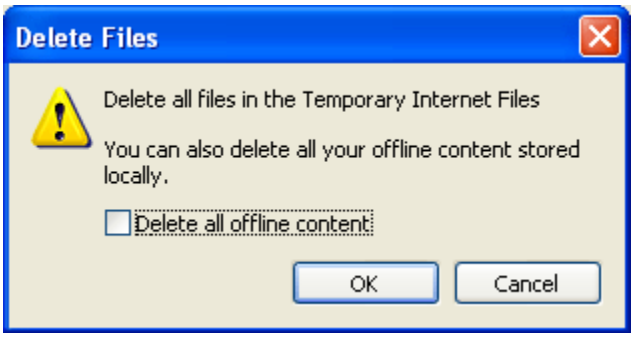


Figure 434 Temp File Warning Message

3. You can select to delete all offline content in addition to the temp files. This will remove any pages that may be stored. Stored pages specify that when you return to a page you viewed previously, the browser should not check to see whether the page has changed since you last viewed it.

   Selecting this option can provide the most speed when browsing through pages you have already viewed.

   Removing stored pages will force the browser to get the page. This may result in slower page loading. However, deleting older pages will help to make sure that you are viewing the most current version of a page.

To clear the temp file:

- Check if you want to **Delete** all offline content.
- Click **OK** to clear the temp file.
- Depending upon the amount of files that need to be deleted, this may take a few minutes. When the temp files have been removed, you will be returned to the previous page.
- Click **OK** to close the Internet Options box and continue working.

If you do not want to clear your temp file, click Cancel to return to the previous screen.

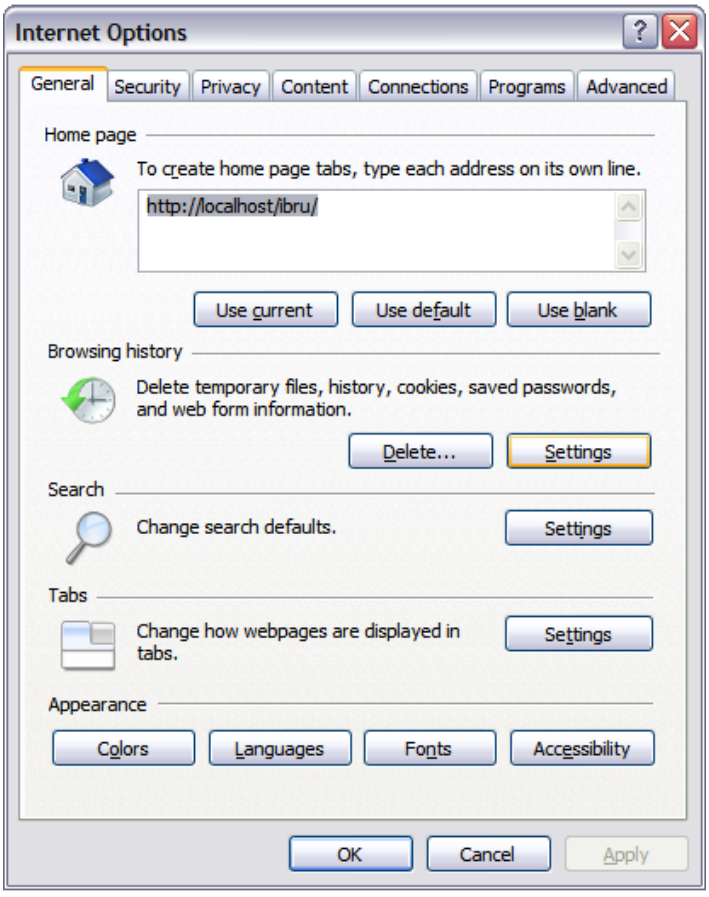
IE ACTIVE X CONTROL UPDATES

RateManager requires an ActiveX controller. Most of the time you will be prompted to install this controller when you begin to use RateManager. A message bar will be displayed at the top of the screen. You can run the ActiveX controller from there. If you experience issues with some RateManager screens in Internet Explorer 7 or Internet Explorer 8, the ActiveX Control may need to be re-registered.

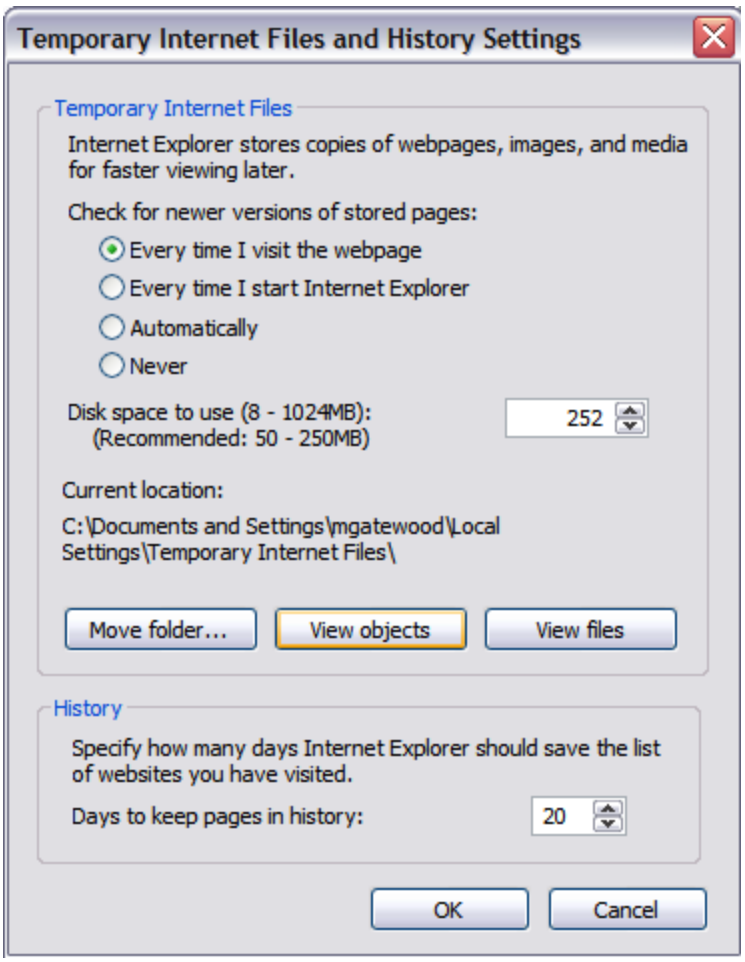
It is **recommended** that you use the Insbridge Internet Explorer Active X registration executable, **RateManager_IE7_IE8.exe** included in the installation download. You also can request this executable from Oracle Insurance support. It is possible to manually update the ActiveX Controls.

1. Open up IE. Please ensure that you do not have any other windows or tabs open.

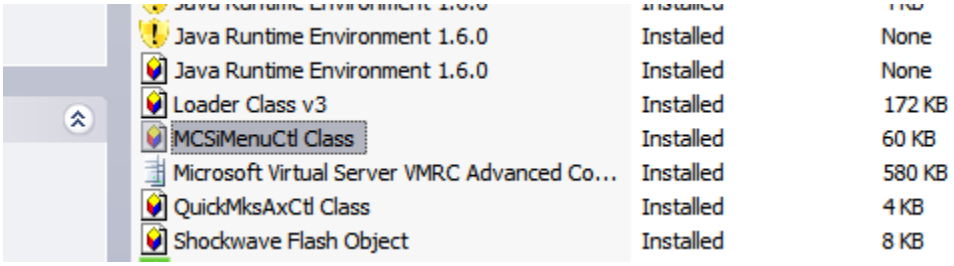
2. Browse to:
   a. Tools ➔ Internet Options
   b. General Tab
   c. Under Browsing history, select Settings



   d. Click View Objects



e. Click the **MCSiMenuCtl Class** and delete it.



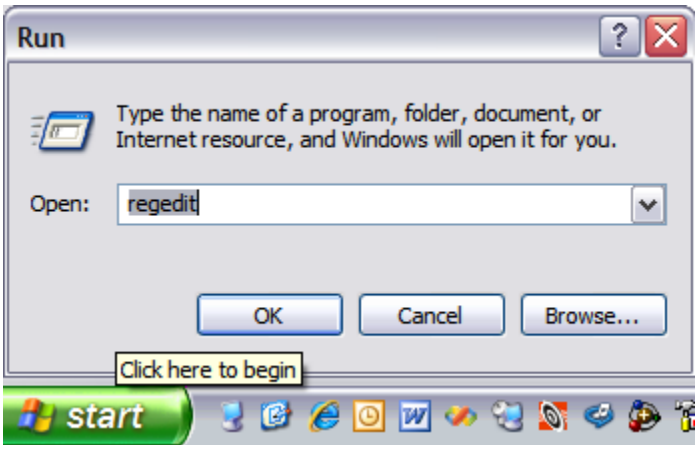
f. Close out of your **IE** Window.

3. You also will need to remove the IE6 control from your registry. You will have two options:

   - **Automatically:** To remove these items automatically, please execute the **RateManager_IE7_IE8.exe**. This executable is provided to you by Oracle Insurance. **It is recommended that you update the registry automatically**.
   - **Manually:** To manually remove the IE6 ActiveX Control from the registry, follow the instructions below:

a. Click Start ➔ Run

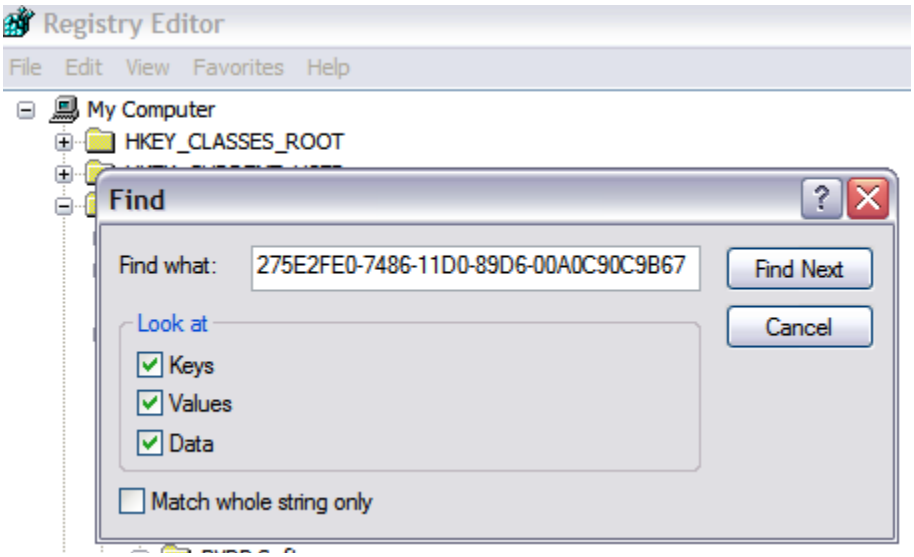
b. Type in Regedit.



c. Select the My Computer section from the tree.

d. Click Edit ➔ Find

e. Type: 275E2FE0-7486-11D0-89D6-00A0C90C9B67



f. Delete Every Key and Value that you find named: {275E2FE0-7486-11D0-89D6-00A0C90C9B67}

4. Login to RateManager and allow the browser to register the ActiveX Control for IE.

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/.

COUNTRY CODES

NAME	ABBR
AFGHANISTAN	AFG
ALBANIA	ALB
ALGERIA	DZA
AMERICAN SAMOA	ASM
ANDORRA	AND
ANGOLA	AGO
ANGUILLA	AIA
ANTARCTICA	ATA
ANTIGUA AND BARBUDA	ATG
ARGENTINA	ARG
ARMENIA	ARM
ARUBA	ABW
AUSTRALIA	AUS
AUSTRIA	AUT
AZERBAIJAN	AZE
BAHAMAS	BHS
BAHRAIN	BHR
BANGLADESH	BGD
BARBADOS	BRB
BELARUS	BLR
BELGIUM	BEL
BELIZE	BLZ
BENIN	BEN
BERMUDA	BMU
BHUTAN	BTN
BOLIVIA	BOL
BOSNIA AND HERZEGOWINA	BIH
BOTSWANA	BWA
BOUVET ISLAND	BVT
BRAZIL	BRA
BRITISH INDIAN OCEAN TERRITORY	IOT
BRUNEI DARUSSALAM	BRN
BULGARIA	BGR
BURKINA FASO	BFA
BURUNDI	BDI

NAME	ABBR
CAMBODIA	KHM
CAMEROON	CMR
CANADA	CAN
CAPE VERDE	CPV
CAYMAN ISLANDS	CYM
CENTRAL AFRICAN REPUBLIC	CAF
CHAD	TCD
CHILE	CHL
CHINA	CHN
CHRISTMAS ISLAND	CXR
COCOS (KEELING) ISLANDS	CCK
COLOMBIA	COL
COMOROS	COM
CONGO	COG
COOK ISLANDS	COK
COSTA RICA	CRI
COTE D'IVOIRE	CIV
CROATIA (local name: Hrvatska)	HRV
CUBA	CUB
CYPRUS	CYP
CZECH REPUBLIC	CZE
DENMARK	DNK
DJIBOUTI	DJI
DOMINICA	DMA
DOMINICAN REPUBLIC	DOM
EAST TIMOR	TMP
ECUADOR	ECU
EGYPT	EGY
EL SALVADOR	SLV
EQUATORIAL GUINEA	GNQ
ERITREA	ERI
ESTONIA	EST
ETHIOPIA	ETH
FALKLAND ISLANDS (MALVINAS)	FLK
FAROE ISLANDS	FRO
FIJI	FJI
FINLAND	FIN
FRANCE	FRA
FRANCE, METROPOLITAN	FXX
FRENCH GUIANA	GUF

NAME	ABBR
FRENCH POLYNESIA	PYF
FRENCH SOUTHERN TERRITORIES	ATF
GABON	GAB
GAMBIA	GMB
GEORGIA	GEO
GERMANY	DEU
GHANA	GHA
GIBRALTAR	GIB
GREECE	GRC
GREENLAND	GRL
GRENADA	GRD
GUADELOUPE	GLP
GUAM	GUM
GUATEMALA	GTM
GUINEA	GIN
GUINEA-BISSAU	GNB
GUYANA	GUY
HAITI	HTI
HEARD AND MC DONALD ISLANDS	HMD
HONDURAS	HND
HONG KONG	HKG
HUNGARY	HUN
ICELAND	ISL
INDIA	IND
INDONESIA	IDN
IRAN (ISLAMIC REPUBLIC OF)	IRN
IRAQ	IRQ
IRELAND	IRL
ISRAEL	ISR
ITALY	ITA
JAMAICA	JAM
JAPAN	JPN
JORDAN	JOR
KAZAKHSTAN	KAZ
KENYA	KEN
KIRIBATI	KIR
KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF	PRK
KOREA, REPUBLIC OF	KOR
KUWAIT	KWT
KYRGYZSTAN	KGZ

NAME	ABBR
LAO PEOPLE'S DEMOCRATIC REPUBLIC	LAO
LATVIA	LVA
LEBANON	LBN
LESOTHO	LSO
LIBERIA	LBR
LIBYAN ARAB JAMAHIRIYA	LBY
LIECHTENSTEIN	LIE
LITHUANIA	LTU
LUXEMBOURG	LUX
MACAU	MAC
MACEDONIA, THE FORMER YUGOSLAV REPUBLIC OF	MKD
MADAGASCAR	MDG
MALAWI	MWI
MALAYSIA	MYS
MALDIVES	MDV
MALI	MLI
MALTA	MLT
MARSHALL ISLANDS	MHL
MARTINIQUE	MTQ
MAURITANIA	MRT
MAURITIUS	MUS
MAYOTTE	MYT
MEXICO	MEX
MICRONESIA, FEDERATED STATES OF	FSM
MOLDOVA, REPUBLIC OF	MDA
MONACO	MCO
MONGOLIA	MNG
MONTSERRAT	MSR
MOROCCO	MAR
MOZAMBIQUE	MOZ
MYANMAR	MMR
NAMIBIA	NAM
NAURU	NRU
NEPAL	NPL
NETHERLANDS	NLD
NETHERLANDS ANTILLES	ANT
NEW CALEDONIA	NCL
NEW ZEALAND	NZL
NICARAGUA	NIC
NIGER	NER

NAME	ABBR
NIGERIA	NGA
NIUE	NIU
NORFOLK ISLAND	NFK
NORTHERN MARIANA ISLANDS	MNP
NORWAY	NOR
OMAN	OMN
PAKISTAN	PAK
PALAU	PLW
PANAMA	PAN
PAPUA NEW GUINEA	PNG
PARAGUAY	PRY
PERU	PER
PHILIPPINES	PHL
PITCAIRN	PCN
POLAND	POL
PORTUGAL	PRT
PUERTO RICO	PRI
QATAR	QAT
REUNION	REU
ROMANIA	ROM
RUSSIAN FEDERATION	RUS
RWANDA	RWA
SAINT KITTS AND NEVIS	KNA
SAINT LUCIA	LCA
SAINT VINCENT AND THE GRENADINES	VCT
SAMOA	WSM
SAN MARINO	SMR
SAO TOME AND PRINCIPE	STP
SAUDI ARABIA	SAU
SENEGAL	SEN
SEYCHELLES	SYC
SIERRA LEONE	SLE
SINGAPORE	SGP
SLOVAKIA (Slovak Republic)	SVK
SLOVENIA	SVN
SOLOMON ISLANDS	SLB
SOMALIA	SOM
SOUTH AFRICA	ZAF
SOUTH GEORGIA AND THE SOUTH SANDWICH ISLANDS	SGS
SPAIN	ESP

NAME	ABBR
SRI LANKA	LKA
ST. HELENA	SHN
ST. PIERRE AND MIQUELON	SPM
SUDAN	SDN
SURINAME	SUR
SVALBARD AND JAN MAYEN ISLANDS	SJM
SWAZILAND	SWZ
SWEDEN	SWE
SWITZERLAND	CHE
SYRIAN ARAB REPUBLIC	SYR
TAIWAN, PROVINCE OF CHINA	TWN
TAJIKISTAN	TJK
TANZANIA, UNITED REPUBLIC OF	TZA
THAILAND	THA
TOGO	TGO
TOKELAU	TKL
TONGA	TON
TRINIDAD AND TOBAGO	TTO
TUNISIA	TUN
TURKEY	TUR
TURKMENISTAN	TKM
TURKS AND CAICOS ISLANDS	TCA
TUVALU	TUV
UGANDA	UGA
UKRAINE	UKR
UNITED ARAB EMIRATES	ARE
UNITED KINGDOM	GBR
UNITED STATES	USA
UNITED STATES MINOR OUTLYING ISLANDS	UMI
URUGUAY	URY
UZBEKISTAN	UZB
VANUATU	VUT
VATICAN CITY STATE (HOLY SEE)	VAT
VENEZUELA	VEN
VIET NAM	VNM
VIRGIN ISLANDS (BRITISH)	VGB
VIRGIN ISLANDS (U.S.)	VIR
WALLIS AND FUTUNA ISLANDS	WLF
WESTERN SAHARA	ESH
YEMEN	YEM

NAME	ABBR
YUGOSLAVIA	YUG
ZAIRE	ZAR
ZAMBIA	ZMB
ZIMBABWE	ZWE

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 table variable to determine which value to return. Any input or variable can be used as 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.
Date Mask:	Specifies how SoftRater interprets dates being passed into an input file.
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 table 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.
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/Then:	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 table 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	
Mask:	A feature that allows the customer to determine how data in a table should be interpreted.
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 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	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an

Function:	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:	A value that is passed out of the system after rating.
Result Mapping:	A defined set of results, inputs and variables displayed in the output file.
Revision:	A variable specific type of versioning.
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.
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.
Table Variable:	A variable that uses other variables and inputs as criteria in determining the appropriate value.
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.
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 table variables that tells RateManager that one or more rows ignore the value passed in for the criteria.
MultiLines:	A MultiLines program 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.
X	
XML ID:	A number automatically assigned by RateManager to identify inputs and categories.

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