ORACLE
INSURANCE

Oracle Insurance

# Insbridge Enterprise Rating

# RateManager User Guide

## Modules Volume 2

Release 4.8

August 2014

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Oracle Insurance Insbridge Enterprise Rating RateManager User Guide

Release 4.8.x

Part # E54880-01

Library #E54888-01

August 2014

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# CONTENTS


## PREFACE

Audience ..... x
Related Documents ..... x
Conventions ..... x
Navigating RateManager ..... xi
Basic Safety Precautions ..... xi
Inactivity/Timeout ..... xi
System Requirements ..... xi
Manual History ..... xi

## CHAPTER 1

TESTING ..... 12
Functionality ..... 13
Fields ..... 14
Rating an Input File ..... 18
Upload Local Test Files ..... 19
Deleting an Input File ..... 21
Run Custom Input Mapping ..... 22
Result Files: Viewing Output ..... 24
XML Report ..... 25
Standard Rating Summary Report ..... 26
Functionality ..... 27
Fields ..... 27
Run Custom Output Mapping ..... 34
Deleting a Result File ..... 36
Report Errors ..... 37

## CHAPTER 2

IMPACT ANALYSIS ..... 38
Preparation ..... 39
Preparing a Batch Input File ..... 39
Batch Files ..... 43
Functionality ..... 43
Fields ..... 45
Rating an Insbridge XML Batch File ..... 48
Rating a Custom XML Batch File ..... 50
Rate All Files in This Directory ..... 53

Deleting a Batch File ..... 53
Error Information ..... 54
REPORTING ..... 56
Functionality ..... 57
Fields ..... 57
NEW SCENARIO ..... 60
Step 1: Select Results ..... 61
Functionality ..... 61
Fields ..... 62
Step 2: Define Report ..... 64
Functionality ..... 64
Fields ..... 65
Setting Flags ..... 67
Chart Flags ..... 68
Report Filters ..... 68
Creating a New Scenario Report ..... 72
Editing a Scenario Report ..... 73
Renaming a Scenario Report ..... 74
Deleting a Scenario or Scenario Report ..... 75
REPORTS ..... 76
Viewing a View XML Report ..... 76
Viewing a View Output Report ..... 77
Viewing Baseline and Comparison Files ..... 79
Viewing a Scenario Report ..... 82
Summary/Chart View ..... 83
Detail Report ..... 84
Exporting a Report ..... 87

**CHAPTER 3**

RELEASES ..... 88
Releases Security ..... 90
Releases ..... 92
Functionality ..... 93
Fields ..... 93
Enforce Release Packaging ..... 94
Creating a New Release ..... 95
Edit Release Options ..... 96
Copy Releases ..... 96
Locking a Release ..... 96
Deleting a Release ..... 97
Deploying a Release ..... 97
Edit Content Tab ..... 98
Functionality ..... 98
Fields ..... 99
Locking a Package ..... 100

Adding Programs to a Release ..... 100
Removing a Program ..... 101
Creating Program Packages within a Release ..... 101
Packaging ..... 103
Functionality ..... 104
Fields ..... 104
Creating a Packaging Job ..... 105
Override Pack Options ..... 105
Editing a Packaging Job ..... 106
Start a Packaging Job ..... 106
Stop a Packaging Job ..... 108
Delete a Packaging Job ..... 109
Edit Package Programs Tab ..... 109
Functionality ..... 110
Fields ..... 111
Adding Programs to a Batch Packaging Job ..... 111
Removing a Program ..... 112
Editing Package Options ..... 112

**CHAPTER 4**

MULTILINES ..... 116
Sample Summary Multiline Program ..... 117
Sample Cascading Multiline Program ..... 118
Inputs ..... 119
Functionality ..... 119
Fields ..... 120
Creating a New MultiLines Variable Input ..... 121
Editing a MultiLines Input ..... 122
Copying a MultiLines Input ..... 123
Deleting a MultiLines Input ..... 123
MultiLines Inputs XML ..... 124
MultiLines ..... 125
Functionality ..... 126
Fields ..... 126
Creating a MultiLines Program ..... 126
Editing a MultiLines ..... 127
Copying a MultiLines ..... 127
Deleting a MultiLines ..... 128
Programs ..... 128
Adding Programs ..... 130
Removing Program/Program Versions ..... 130
MultiLines Mapping ..... 131
Adding a New Results Group ..... 132
Editing Result Groups in MultiLines Mapping ..... 133
Editing a Group ..... 134

Copying a Result Group ..... 134
Deleting a Result Group ..... 134
Scenario ..... 135
Editing a Scenario ..... 136

**CHAPTER 5**

LIBRARY ..... 137
Sublines and Templates ..... 138
Library Options ..... 139
Exports ..... 139
Templates ..... 140
Custom XML ..... 140
Public XML ..... 140
Functionality ..... 141
Fields ..... 142
Working with Exports ..... 144
Create a New Export ..... 144
Applying Exported Programs ..... 145
Apply Options ..... 147
Editing an Export ..... 147
Deleting a Template ..... 148
Working with Templates ..... 148
Creating a New Template ..... 148
Applying a Template ..... 150
Applying a Template: New Program ..... 151
Applying a Template: Existing Program ..... 154
Editing a Template ..... 156
Deleting a Template ..... 156
Reconcile ..... 157
Viewing Reconcile Reports ..... 163
Failed Template ..... 164
Completed Template ..... 165
Working with Custom XML Files ..... 166
Editing a Custom XML File ..... 166
Deleting a Custom XML File ..... 166
Working with Public XML Files ..... 167
Applying Public XML Programs ..... 167
Apply Options ..... 169
Editing a Public XML File ..... 170
Deleting a Public XML File ..... 170
Updated Files ..... 171
Notice ..... 171
Upload from File ..... 172
Save to File ..... 174

**SUPPORT**

CONTACTING SUPPORT ..... 177

**APPENDIX A**

COUNTRY CODES..... 178

**GLOSSARY**

GLOSSARY TERMS..... 185

**INDEX**

INDEX ..... 190

# LIST OF FIGURES

FIGURE 1 TESTING ..... 12
FIGURE 2 SELECTING THE VIEW ..... 14
FIGURE 3 INPUT FILE LISTING ON TESTING ..... 15
FIGURE 4 RESULT FILE LISTING FOR TESTING ..... 16
FIGURE 5 RIGHT CLICK MENU FOR TESTING INPUT FILE LISTING ..... 17
FIGURE 6 RIGHT CLICK MENU FOR TESTING RESULT FILE LISTING ..... 18
FIGURE 7 RATING A TEST FILE ..... 19
FIGURE 8 UPLOADING A LOCAL TEST FILE ..... 19
FIGURE 9 COPYING A FILE TO ANOTHER VIEW ..... 20
FIGURE 10 RENAMING A TEST FILE ..... 21
FIGURE 11 DELETING AN INPUT FILE ..... 21
FIGURE 12 RUNNING A CUSTOM FILE ..... 22
FIGURE 13 RUNNING A CUSTOM XML FILE ..... 22
FIGURE 14 TRANSFORM CUSTOM XML ..... 23
FIGURE 15 VIEWING XML IN TESTING ..... 24
FIGURE 16 RATING REPORT, XML VIEW ..... 25
FIGURE 17 DEBUG REPORT WITH DEBUG ..... 26
FIGURE 18 RATING SUMMARY ON A DEBUG REPORT ..... 28
FIGURE 19 RATING REPORT WITH DEBUG ..... 30
FIGURE 20 DEBUG REPORT SHOWING EXECUTION ORDER ..... 31
FIGURE 21 DEBUG RATING REPORT WITH TABLE VARIABLE HIGHLIGHTED ..... 32
FIGURE 22 LINKED TABLE VARIABLE IN A DEBUG REPORT ..... 32
FIGURE 23 DEBUG RATING REPORT WITH ALGORITHM/CALCULATED VARIABLE HIGHLIGHTED ..... 33
FIGURE 24 UNDERWRITING RULE IN A DEBUG REPORT ..... 33
FIGURE 25 USING CUSTOM OUTPUT MAPPING ..... 35
FIGURE 26 DELETING A RESULT FILE ..... 36
FIGURE 27 REPORT ERRORS ..... 37
FIGURE 28 ERROR MESSAGE FOR RATING A FILE ..... 37
FIGURE 29 IMPACT ANALYSIS TAB ..... 38
FIGURE 30 EXAMPLE OF A BATCH XML FILE ..... 40
FIGURE 31 IMPACT ANALYSIS BATCH FILE ..... 42
FIGURE 32 BATCH FILES SUB-TAB ..... 43
FIGURE 33 XML INPUT FILE LISTING AREA ..... 46
FIGURE 34 RESULT FILE LISTING ..... 47
FIGURE 35 RIGHT CLICK MENU FOR THE XML INPUT FILE LISTING ..... 48
FIGURE 36 RIGHT CLICK MENU FOR RESULT FILE LISTING ..... 48
FIGURE 37 ENTERING A BATCH FILE NAME ..... 49
FIGURE 38 CONFIRMATION MESSAGE FOR BATCH RATE REQUEST ..... 49
FIGURE 39 NEW RATE CUSTOM BATCH FILE DIALOG BOX ..... 50
FIGURE 40 EXAMPLE CUSTOM BATCH FILE ..... 51
FIGURE 41 CONFIRMATION MESSAGE FOR BATCH RATE REQUEST ..... 52
FIGURE 42 ASTERISK DENOTING TO RATE ALL FILES ..... 53
FIGURE 43 DELETE INPUT FILE MESSAGE ..... 53
FIGURE 44 ERROR MESSAGE FOR BATCH RATE ..... 54
FIGURE 45 REPORTING SUB-TAB ..... 56
FIGURE 46 IMPACT ANALYSIS SCENARIO LISTING ..... 58
FIGURE 47 IMPACT ANALYSIS SCENARIO REPORT LISTING ..... 59
FIGURE 48 CREATING A NEW SCENARIO ..... 60
FIGURE 49 STEP 1: SELECT RESULTS ..... 61
FIGURE 50 FILE NAME EXAMPLE ..... 63
FIGURE 51 STEP 2: DEFINE REPORT ..... 64
FIGURE 52 RIGHT CLICK MENU FOR STEP 2: DEFINE REPORT ..... 66
FIGURE 53 FLAGGING OR UN-FLAGGING A RESULT ..... 67
FIGURE 54 POLICY FILTER OPTIONS ..... 69
FIGURE 55 FILTER OPTIONS SELECTING AN OPERATOR ..... 70

FIGURE 56 ENTERING A CONSTANT VALUE ..... 70
FIGURE 57 STEP 2: DEFINE REPORT WITH FLAGS AND FILTERS ..... 71
FIGURE 58 CONFIRMATION MESSAGE FOR RUNNING AN IMPACT ANALYSIS SCENARIO ..... 72
FIGURE 59 ERROR MESSAGE FOR BATCH RATE ..... 73
FIGURE 60 RENAMING A SCENARIO REPORT ..... 74
FIGURE 61 DELETE REPORT MESSAGE ..... 75
FIGURE 62 VIEW XML REPORT ..... 76
FIGURE 63 VIEW OUTPUT REPORT ..... 77
FIGURE 64 OUTPUT XML WITH MULTIPLE FILES ..... 78
FIGURE 65 VIEWING BASELINE OR COMPARISON FILES ..... 80
FIGURE 66 IMPACT ANALYSIS SCENARIO REPORT WITH CHART ..... 82
FIGURE 67 SCENARIO REPORT DETAILS ..... 84
FIGURE 68 POLICY TO PDF REPORT ..... 86
FIGURE 69 EXPORTING A REPORT ..... 87
FIGURE 70 RELEASE PROCESS ..... 88
FIGURE 71 RELEASES SCREEN ..... 89
FIGURE 72 RELEASES SCREEN ..... 90
FIGURE 73 RELEASE MANAGER RIGHTS ..... 91
FIGURE 74 RELEASES SUB-TAB ..... 92
FIGURE 75 RIGHT CLICK MENU FOR THE RELEASES LISTING ..... 94
FIGURE 76 CREATING NEW RELEASE ..... 95
FIGURE 77 COPY RELEASE ..... 96
FIGURE 78 DEPLOYING A RELEASE ..... 97
FIGURE 79 EDIT CONTENT FOR A RELEASE ..... 98
FIGURE 80 RIGHT CLICK MENU FOR THE EDIT CONTENT LISTING ..... 100
FIGURE 81 SELECTING VERSIONS TO ADD TO A PROGRAM ..... 101
FIGURE 82 PACKAGING PROGRAMS FOR A RELEASE ..... 102
FIGURE 83 PACKAGING SUB-TAB ..... 103
FIGURE 84 CREATING NEW JOB ..... 105
FIGURE 85 OVERRIDE BATCH PACKAGE OPTIONS ERROR ..... 106
FIGURE 86 STARTING A BATCH ..... 107
FIGURE 87 EDITING PROGRAM PACKAGING OPTIONS ALLOWING FOR OVERRIDE ..... 107
FIGURE 88 PROGRAMS TAB ..... 109
FIGURE 89 EDIT PACKAGE PROGRAMS ..... 110
FIGURE 90 SELECTING VERSIONS TO ADD TO A PROGRAM ..... 112
FIGURE 91 EDITING PROGRAM PACKAGING OPTIONS ALLOWING FOR OVERRIDE ..... 113
FIGURE 92 EDITING PROGRAM PACKAGING OPTIONS NOT ALLOWING FOR OVERRIDE ..... 114
FIGURE 93 MULTILINES INPUTS ..... 119
FIGURE 94 MULTILINES INPUTS RIGHT CLICK MENU ..... 120
FIGURE 95 CREATING A NEW MULTILINES INPUT ..... 121
FIGURE 96 EDITING A MULTILINES INPUT ..... 122
FIGURE 97 COPYING A MULTILINES INPUT ..... 123
FIGURE 98 DELETING A MULTILINES INPUT ..... 123
FIGURE 99 MULTILINES INPUTS XML ..... 124
FIGURE 100 MULTILINES ..... 125
FIGURE 101 CREATING A NEW MULTILINES ..... 126
FIGURE 102 EDITING A MULTILINES ..... 127
FIGURE 103 COPYING A MULTILINES ..... 127
FIGURE 104 DELETING A MULTILINES ..... 128
FIGURE 105 MULTILINES PROGRAMS ..... 129
FIGURE 106 MULTILINES MAPPING ..... 131
FIGURE 107 MULTILINES SCENARIO ..... 135
FIGURE 108 LIBRARY ..... 137
FIGURE 109 DRAG COLUMN ON LIBRARY TAB ..... 142
FIGURE 110 RIGHT CLICK MENU ..... 143
FIGURE 111 APPLYING A NEW TEMPLATE ..... 144
FIGURE 112 APPLY EXPORT START ..... 145
FIGURE 113 APPLY EXPORT FINISH ..... 146
FIGURE 114 ERROR IN AN EXPORT PROGRAM ..... 146
FIGURE 115 EDITING AN EXPORT ..... 147
FIGURE 116 DELETING A TEMPLATE ..... 148
FIGURE 117 APPLYING A NEW TEMPLATE ..... 149

FIGURE 118 POPULATED LIBRARY ..... 149
FIGURE 119 APPLYING A NEW PROGRAM ..... 151
FIGURE 120 SELECTING PROGRAM FOLDER ..... 152
FIGURE 121 APPLIED TEMPLATE ..... 153
FIGURE 122 APPLYING TEMPLATE TO EXISTING PROGRAM ..... 154
FIGURE 123 APPLYING A TEMPLATE TO AN EXISTING PROGRAM ..... 154
FIGURE 124 SUCCESSFUL TEMPLATE APPLIED TO AN EXISTING PROGRAM ..... 155
FIGURE 125 EDITING A TEMPLATE ..... 156
FIGURE 126 DELETING A TEMPLATE ..... 157
FIGURE 127 RECONCILIATION WIZARD WELCOME ..... 158
FIGURE 128 SELECTION VERSIONS TO COMPARE ..... 159
FIGURE 129 RECONCILING ALGORITHMS ..... 160
FIGURE 130 CONFIRMATION OF TEMPLATE RECONCILIATION ..... 161
FIGURE 131 SUCCESSFUL TEMPLATE RECONCILIATION ..... 162
FIGURE 132 VERSION COMPARE REPORT ..... 163
FIGURE 133 FAILED TEMPLATE ..... 164
FIGURE 134 FAILED TEMPLATE MESSAGE ..... 164
FIGURE 135 APPLIED TEMPLATES IN PROGRAM EXPLORER ..... 165
FIGURE 136 EDITING A TEMPLATE ..... 166
FIGURE 137 DELETING A TEMPLATE ..... 167
FIGURE 138 APPLY PUBLIC XML START ..... 168
FIGURE 139 APPLY EXPORT FINISH ..... 169
FIGURE 140 EDITING A PUBLIC XML FILET ..... 170
FIGURE 141 DELETING A PUBLIC XML FILE ..... 171
FIGURE 142 SELECTING A TEMPLATE FILE TO DOWNLOAD ..... 172
FIGURE 143 PUBLIC XML FILES ..... 173
FIGURE 144 CHANGE VIEW ..... 174
FIGURE 145 SAVING A FILE ..... 174
FIGURE 146 SELECTING A SAVE LOCATION ..... 175
FIGURE 147 DOWNLOAD COMPLETE ..... 175

Welcome to the *Oracle Insurance Insbridge Enterprise Rating RateManager User Guide.* This guide describes the features and functionality of Oracle Insurance Insbridge Enterprise Rating RateManager (RateManager). RateManager is a component within the Oracle Insurance Insbridge Enterprise Rating (IBER) 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 Enterprise Rating Framework Administrator User Guide.
- The Oracle Insurance Insbridge Enterprise Rating RateManager User Guide Vol 1
- You can view this and other IBER 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 Enterprise Rating 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 are not 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:** *IBER requires Microsoft Internet Explorer. Other browsers are not compatible at this time.*

# 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 | P01-741-01 | R 4.6.1 | November 2012 | Split |
| 2nd Edition | P01-741-02 | R 4.7 | September 2013 | Release Update |
| 3rd Edition | P01-741-03 | R 4.7.1 | November 2013 | Update |
| 4th Edition | P01-741-04 | R 4.8 | August 2014 | Update |

# 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.

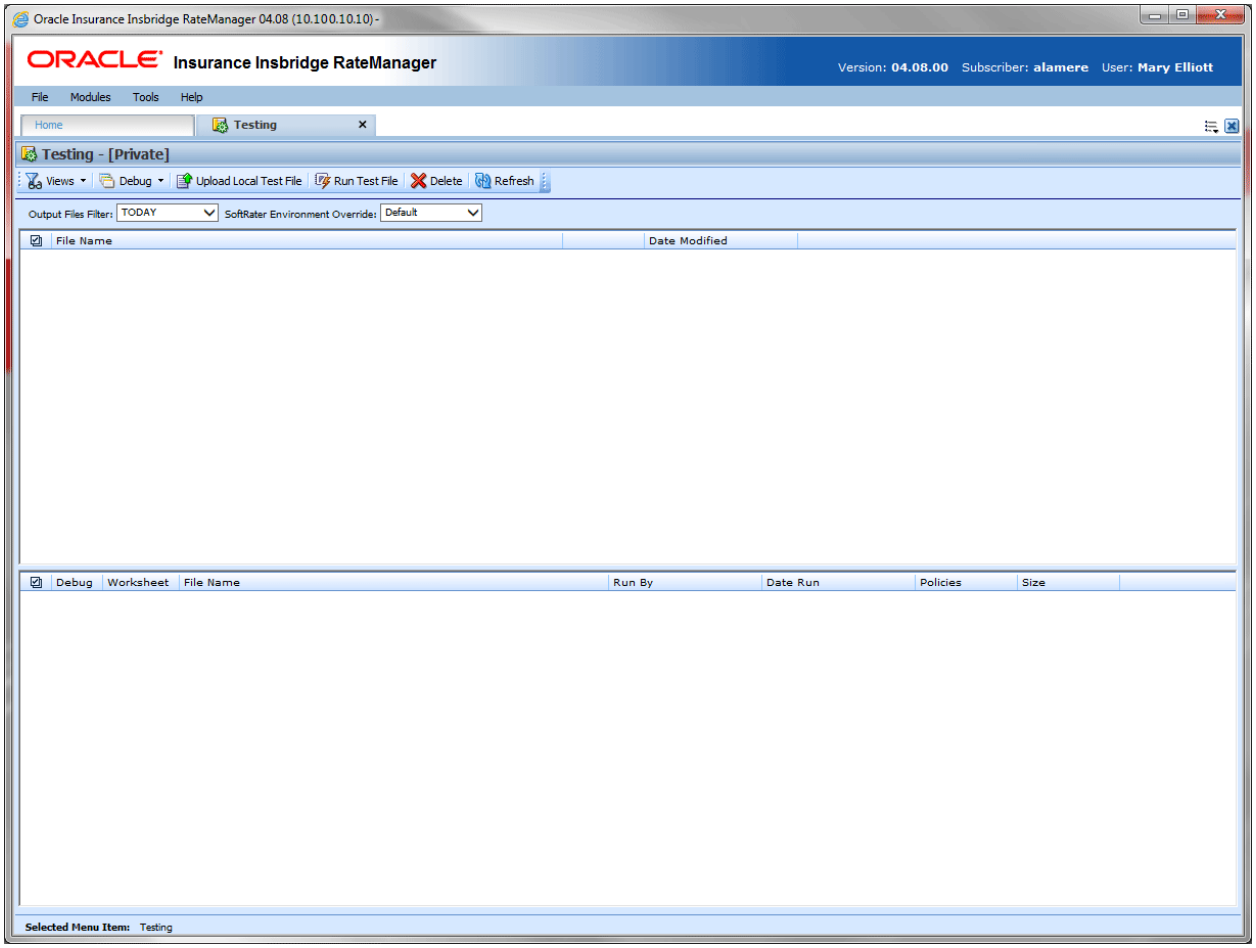



*Figure 1 Testing*

## Navigating to Testing

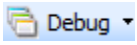
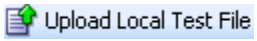
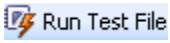
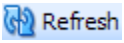
You must have permissions to view and manage the Testing module. If Testing is not an option, you do not have permission. Please contact your system administrator to have permissions added.

1. From the Home Tab, select Modules→**Testing**.
2. This opens the **Testing** module in a separate tab.

# FUNCTIONALITY

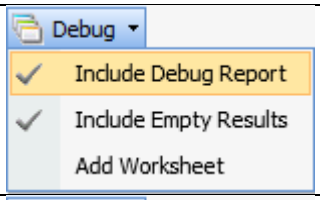
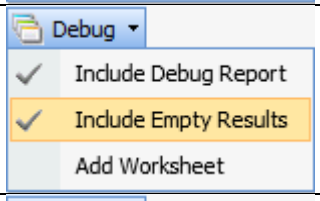
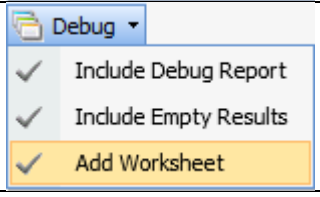
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab.

### Functions

| | |
|---|---|
| | **Views:** Allows you to select the view you want. There are two views:<br>• **Private view** contains files that are visible to the current user only. The default view is Private.<br>• **Public view** contains files that are shared by all users for this subscriber.<br>**NOTE:** *The view you are currently on is in the banner above the menu bar.* |
|  | **Debug:** The Debug dropdown contains options to include with the result. |
|  | **Upload Local Test File:** Uploads an XML input file located on your local computer 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.<br>**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. |

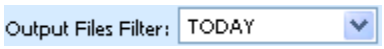
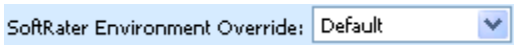
### Debug Options

Debug options allow you to further define the batch rating.

| | |
|---|---|
|  | **Include Debug Report:** Sends the rate through debug. The debug report provides comprehensive detail of every variable and algorithm that is used within the program, allowing you to see each step of every calculation. This option is checked by default. Debug files are local to the Testing tab. |
|  | **Include Empty Results:** Includes empty results in the result report. Empty results are results with a null value. Zero value items are included. The default is for all results to be included.<br>Unchecking this box removes any empty results from the result report. Excluding empty results produces a smaller report. |
|  | **Add Worksheet:** Adds the rating worksheet associated with this program in the result report. A Worksheet is a user defined document that conveys the basic information regarding how the premium was created. You must check this prior to rating. |

### Definition Options

Definition options allow you to further define the batch rating.

| | |
|---|---|
|  | **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.<br>• Default: selects the default environment.<br>• Another Environment: if other environments have been entered, you may select one of those.<br>**NOTE:** *If you select another environment, any defined environments in your ratings will be ignored.* |

### Selecting a View

There are two views available:

- **Public:** The files available to all users.
- **Private:** The files available only to you. This is the default view.

Select the view you want from the Views option in the top bar menu. The tab refreshes with your selection. The banner at the top of the tab displays the current selection.

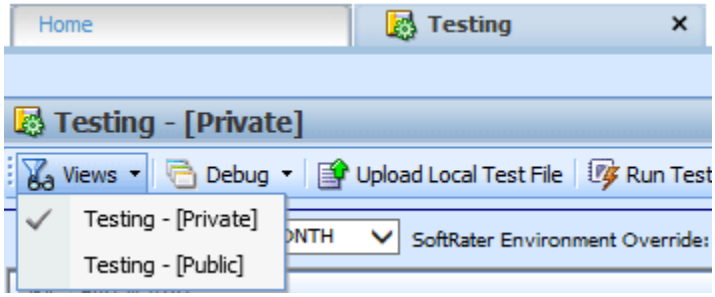



*Figure 2 Selecting the View*

Files can be moved from one view to another with the copy feature. Once a file is public, it can be viewed by anyone with Testing Tab privileges. Public files can be deleted if you do not want to share the file.

## 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. This is the upper portion of the window.
- **Result File Listing:** Shows a listing of result files, sorted newest to oldest by the last rate date time stamp. This is the lower portion of the window.

## 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.

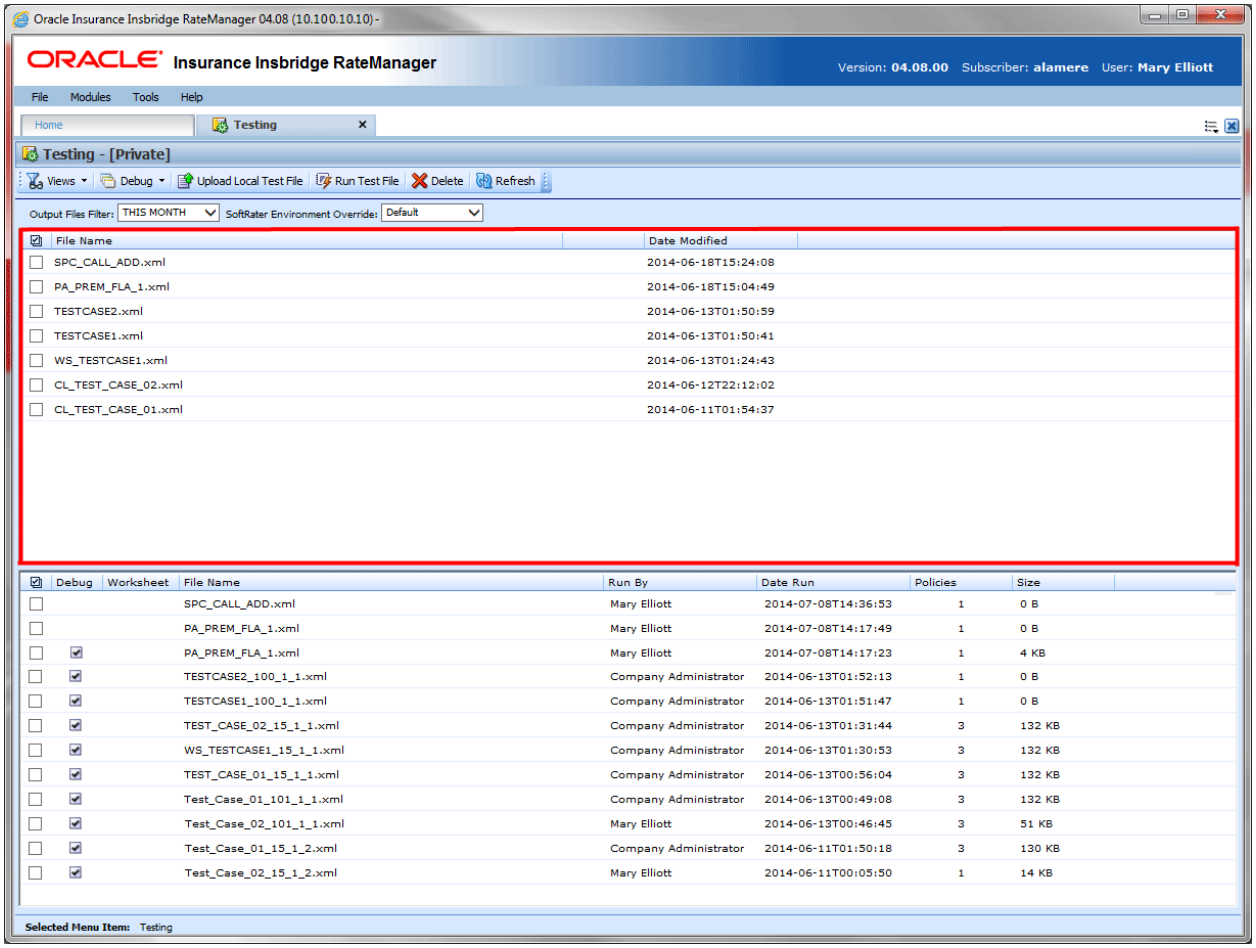



*Figure 3 Input File Listing on Testing*

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 modified.

## 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 are listed.

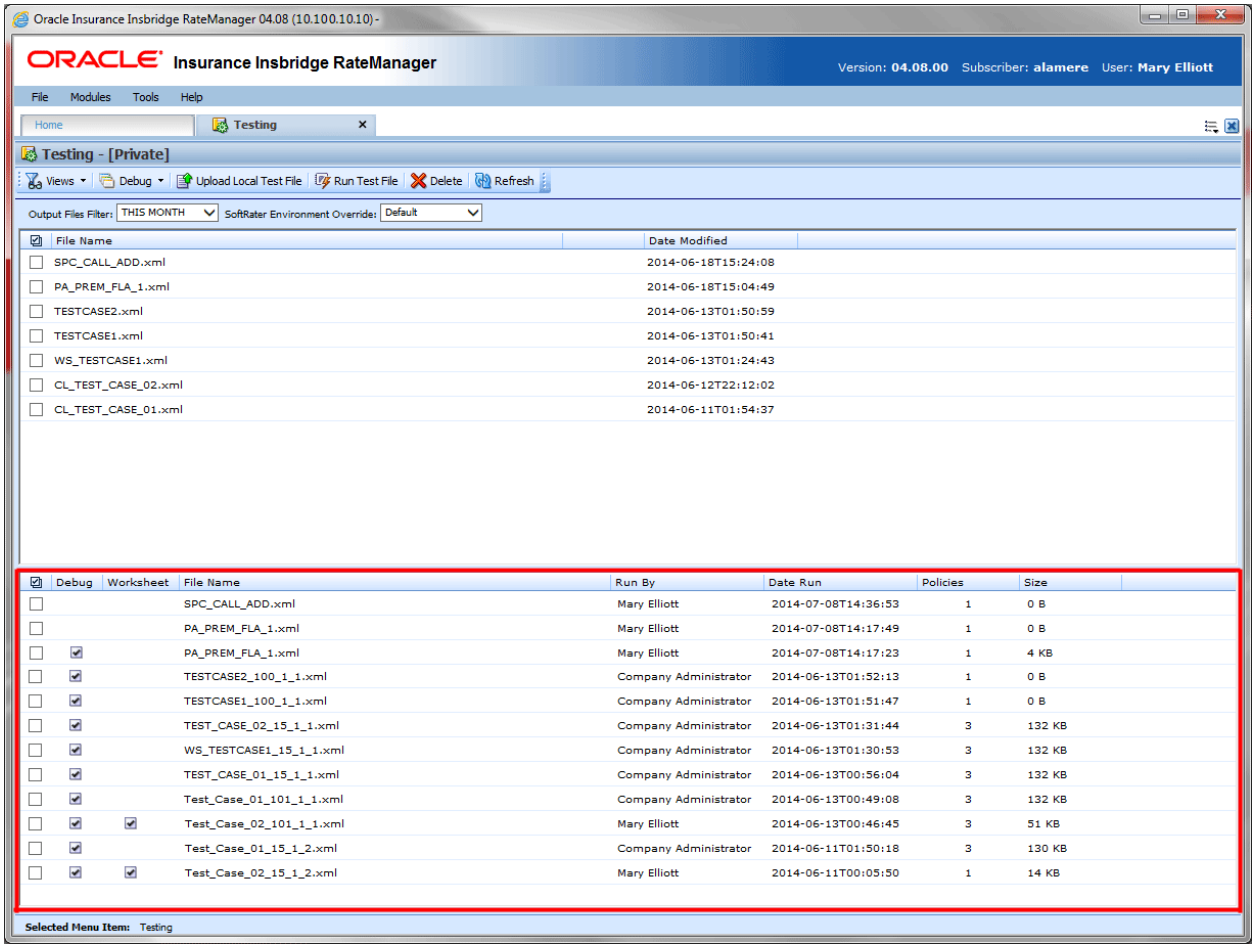



*Figure 4 Result File Listing for Testing*

There are eight fields:

**Checkbox:** Used to select multiple files to delete.

**Debug:** A checkmark indicates the result file is a full debug report.

**Worksheet:** A checkmark indicates that the worksheet associated with this program is included.

**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 in the result file.

**Size:** The size of the result file. Files that do not include a debug report will be smaller.

### Right Click Menu Options

Both the Private and the Public views have the same right click menu options. There are six options for regular input files. There are seven options for input files that contain custom mappings. Result files have four options.

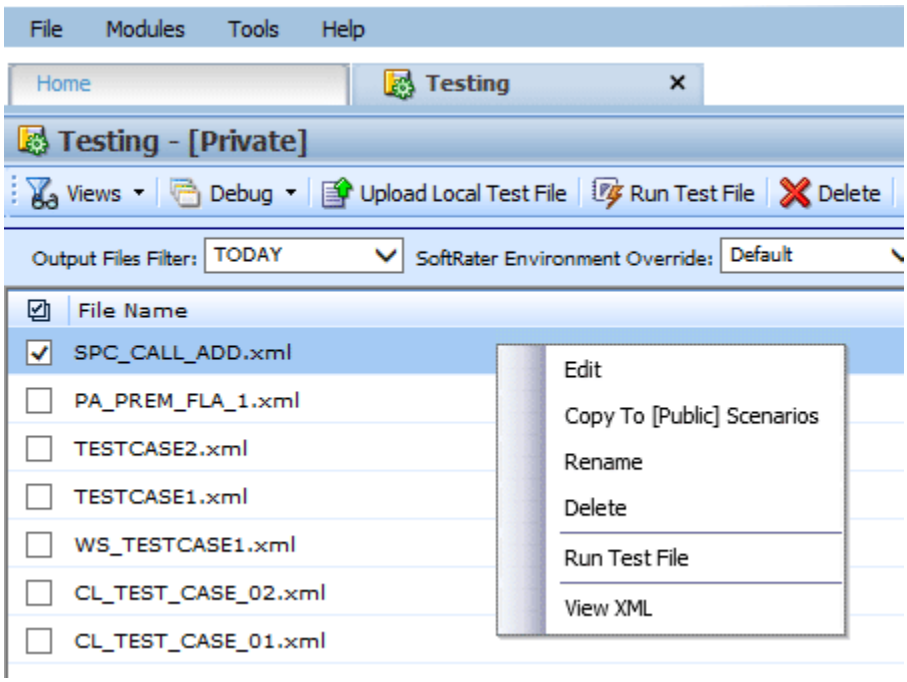



*Figure 5 Right Click Menu for Testing Input File Listing*

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 dialog box. *This option is displayed on files that contain custom input mappings 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.

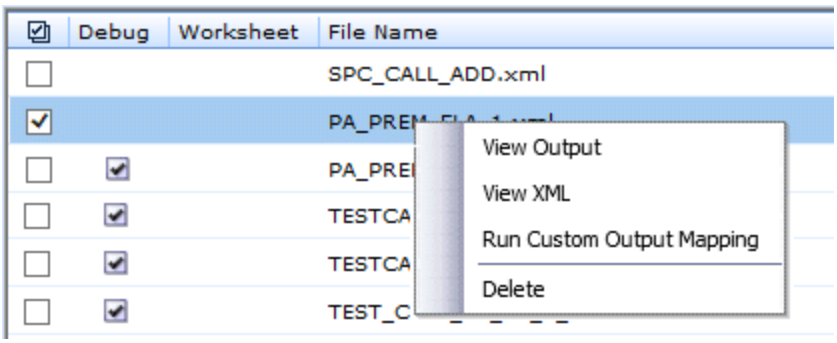



*Figure 6 Right Click Menu for Testing Result File Listing*

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 dialog 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.*

# 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. Select the input file you want to rate.
2. If you want to see a full debug report, check **Include Debug Report**. For a standard report with no debug report, uncheck this box.
3. Check to Add Worksheet, if available.
4. Select the SoftRater Environment Override if you want to use a specific SoftRater environment.

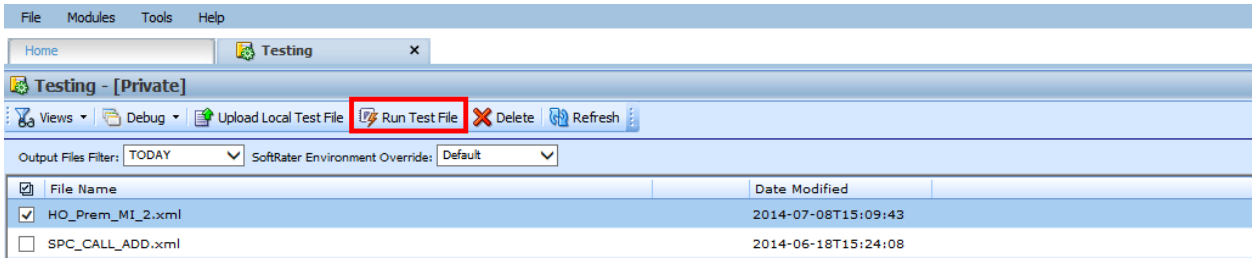



*Figure 7 Rating a Test File*

5. 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. Only XML file types can be uploaded.

1. Click Upload a Local Test File. A separate screen is shown.

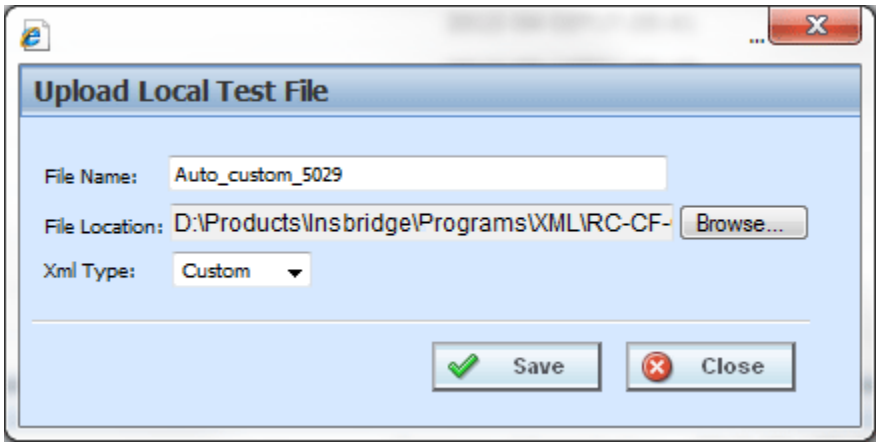



*Figure 8 Uploading a Local Test File*

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 Test Program for more information on working with Test Case Editor.
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.

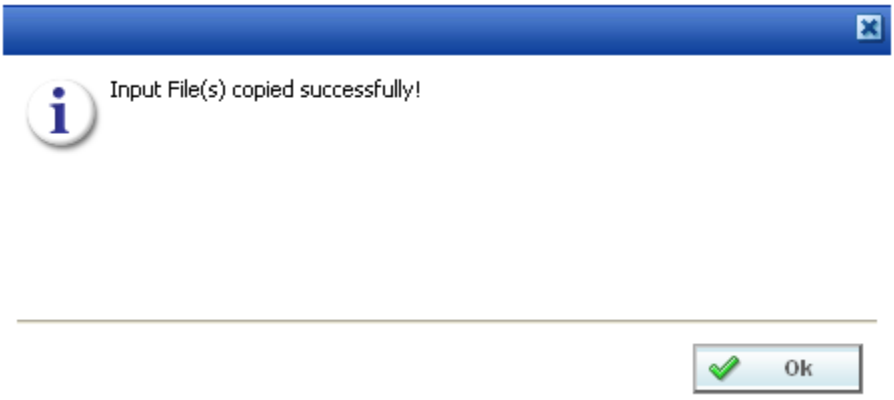



*Figure 9 Copying a File to another View*

### 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.

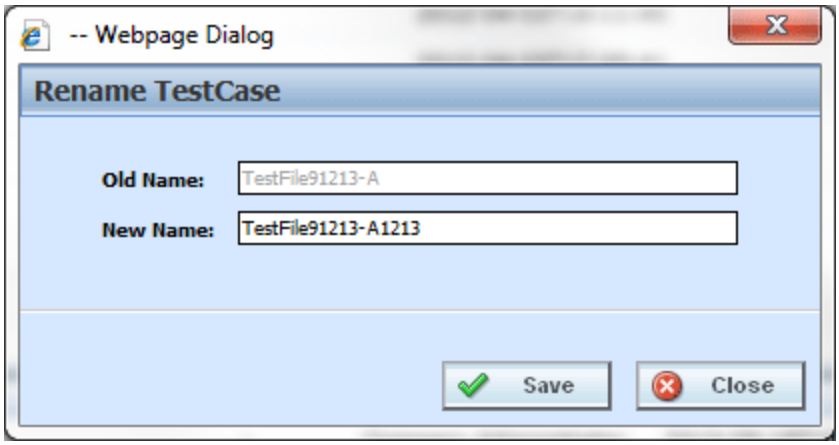



*Figure 10 Renaming a Test File*

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 or 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**.

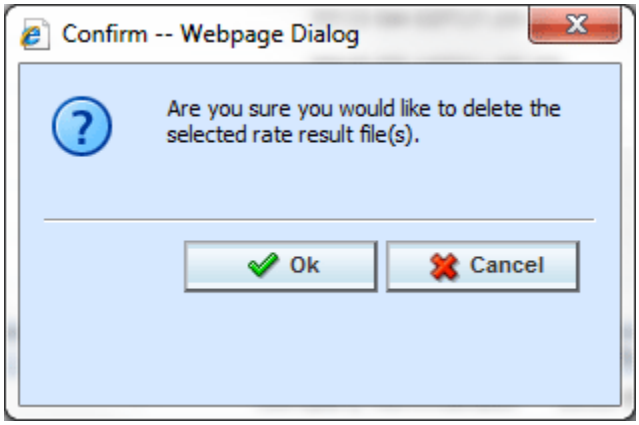



*Figure 11 Deleting an Input File*

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. Only files with custom mapping will have this option. If the option is not present on the right click menu, no custom files are present. Insbridge XML files do not have this option.

1. Select the file that contains custom input mapping.
2. Right click and select **Run Custom Input Mapping**. A separate screen is shown.

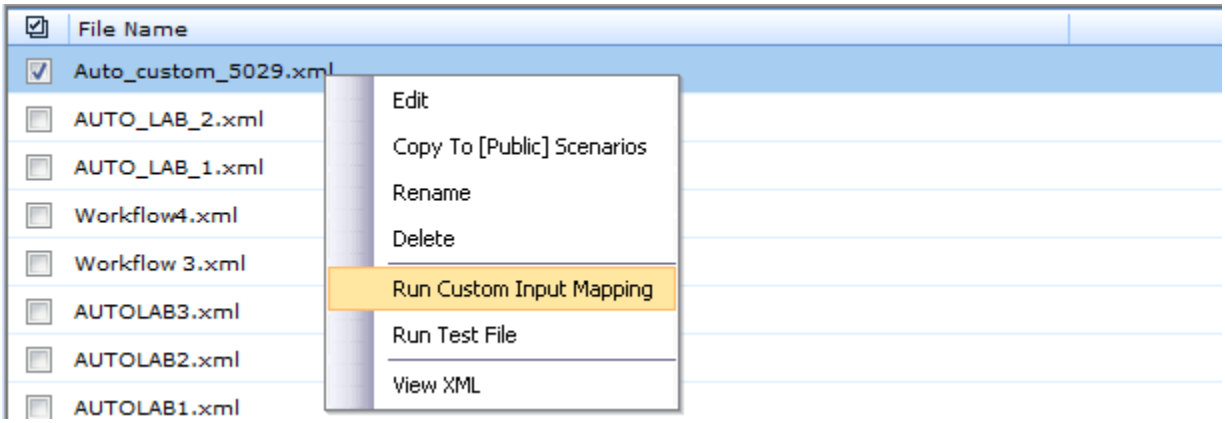



*Figure 12 Running a Custom File*

3. The subscriber information is filled in.

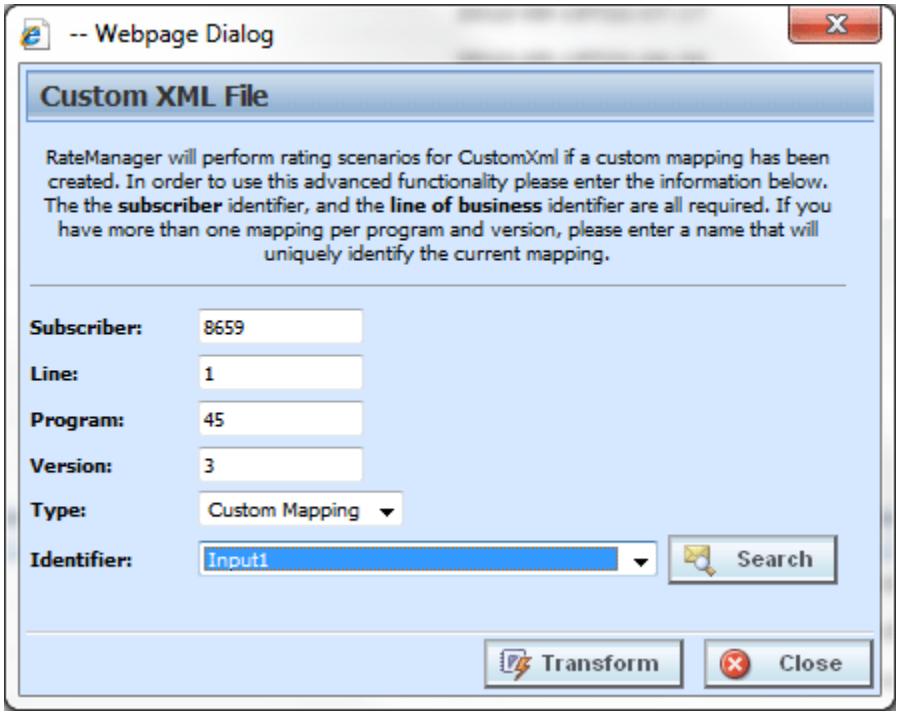



*Figure 13 Running a Custom XML File*

4. Enter in the **Line**, **Program**, and **Version** numbers.

5. Select the **Type** from the drop down menu. There are three options; Line Mapping, Version Mapping, and Custom Mapping.

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**. The file is displayed in the Insbridge XML viewer. Review the file and close. You also can copy the entire file onto a clipboard to view in an XML viewer.

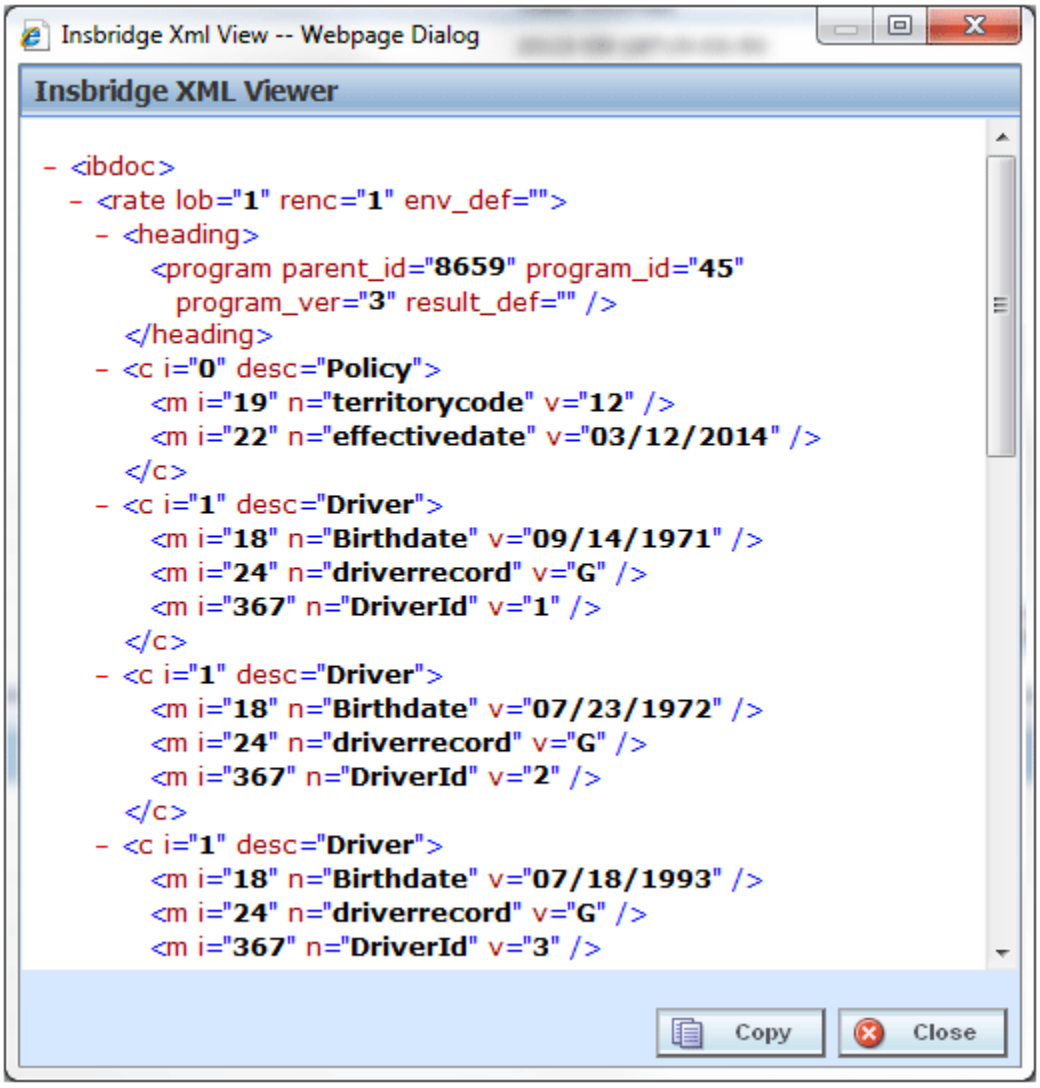



*Figure 14 Transform Custom XML*

8. Your file is associated with the custom XML input mapping you selected. The file is ready to be rated.

**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.

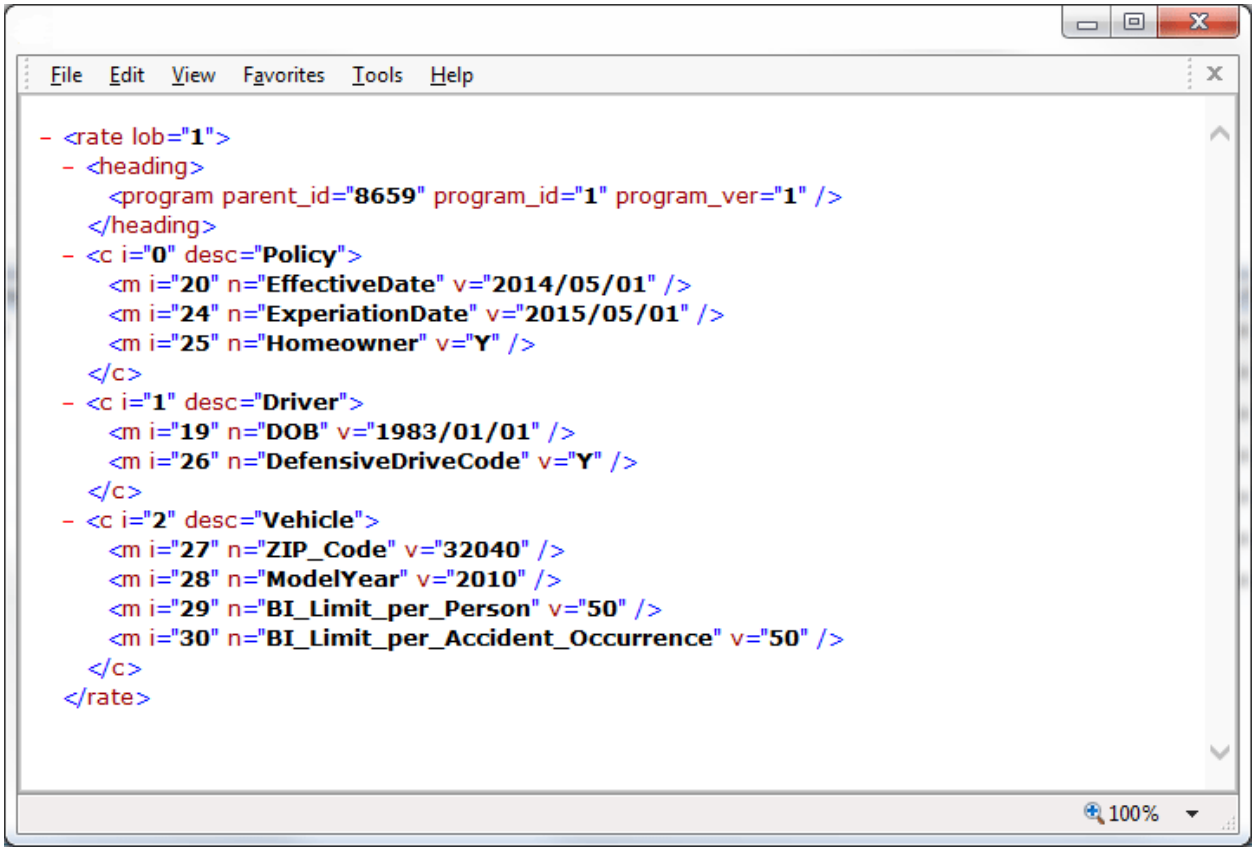



*Figure 15 Viewing XML in Testing*

## 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. The options for viewing the results are:

- **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.
- **Worksheet XML:** shows any associated worksheet for the program. This option is only available if the Add Worksheet option was checked prior to rating and if the program has worksheets associated with it.

## 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.

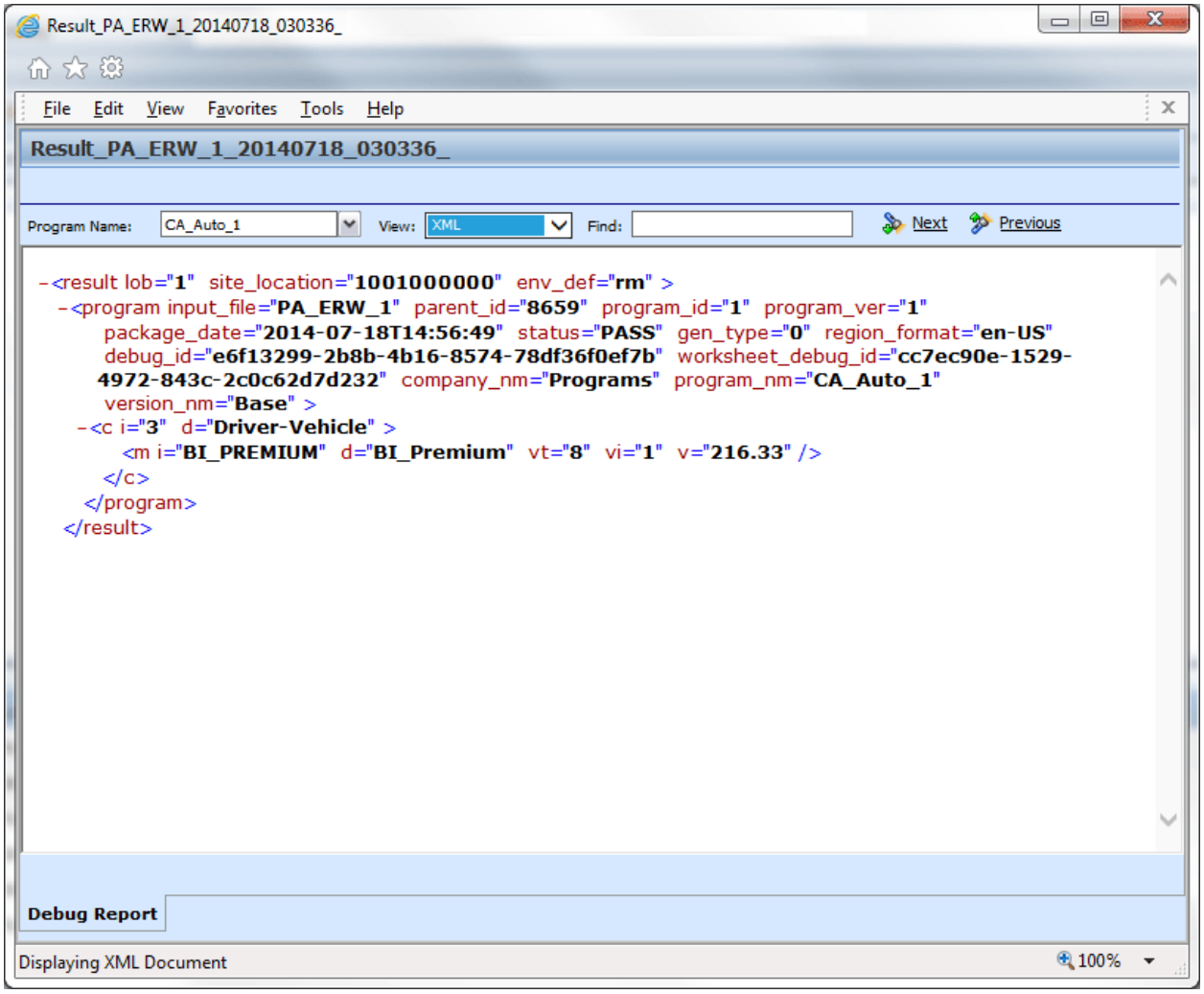



*Figure 16 Rating Report, XML View*

# 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.

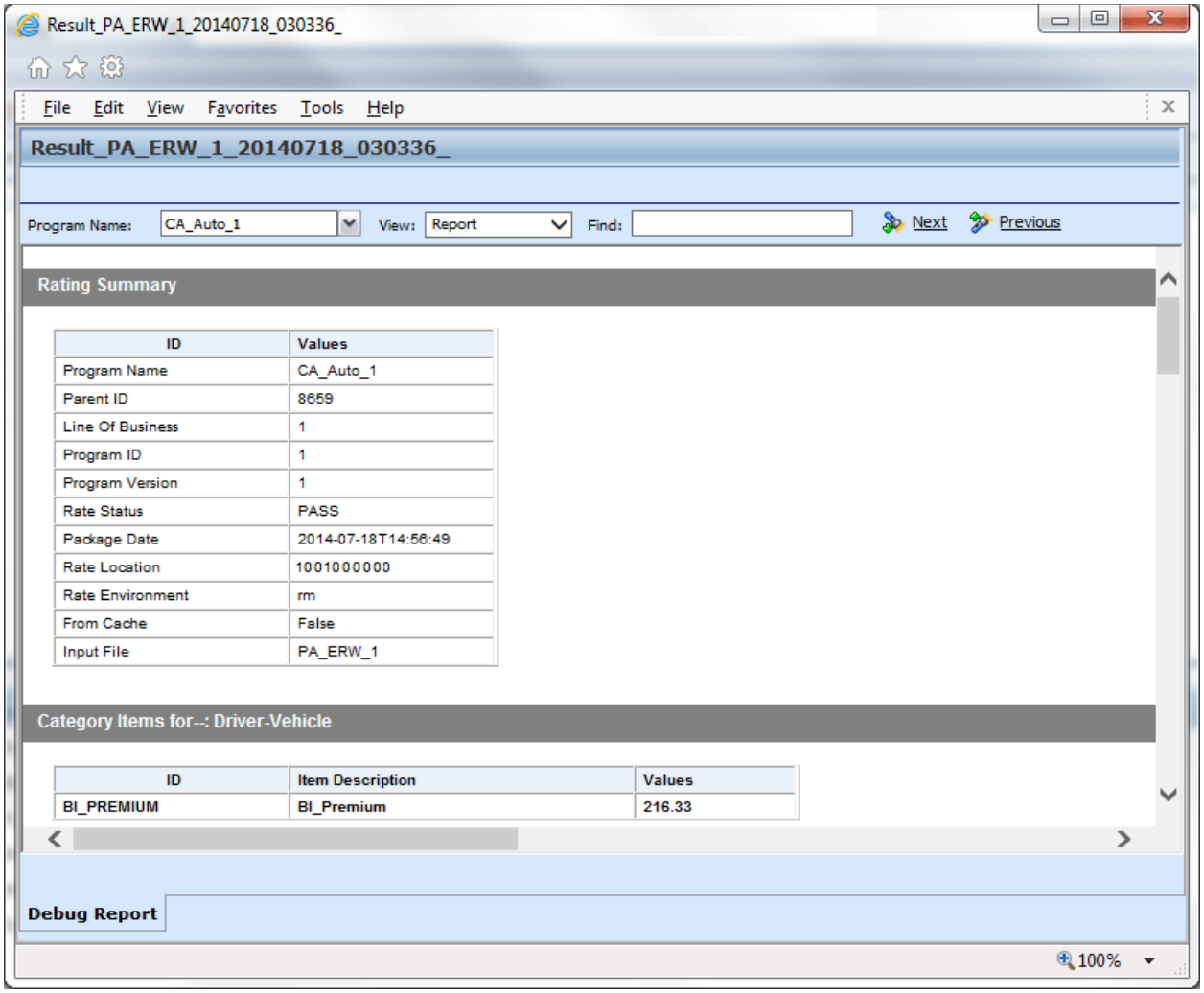
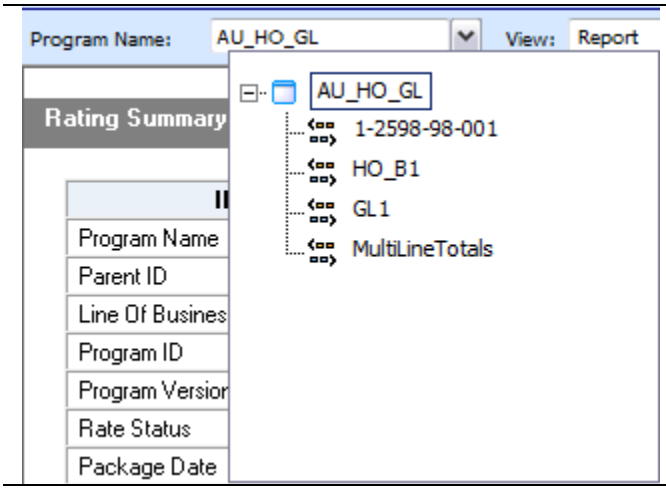
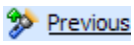



*Figure 17 Debug Report with Debug*

# 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.

| | |
|---|---|
|  | **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. |
| | **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 are 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 Values column contains the values returned.

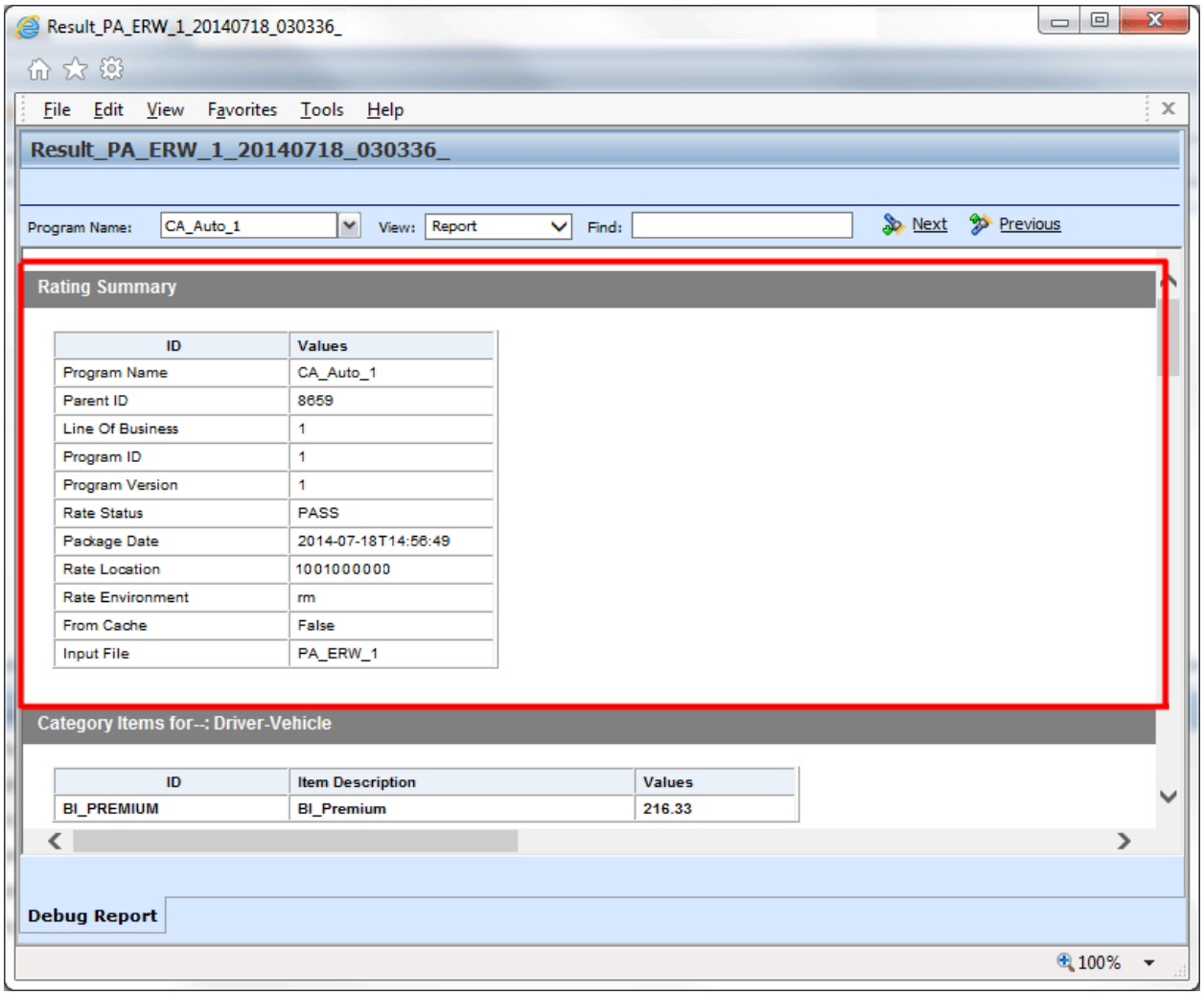



*Figure 18 Rating Summary on a Debug Report*

### 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.

**NOTE:** *WorkFlow programs and P2P program display the execution order after the Rating Summary. To view program details, you must select a program from the Program drop down.*

### 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.

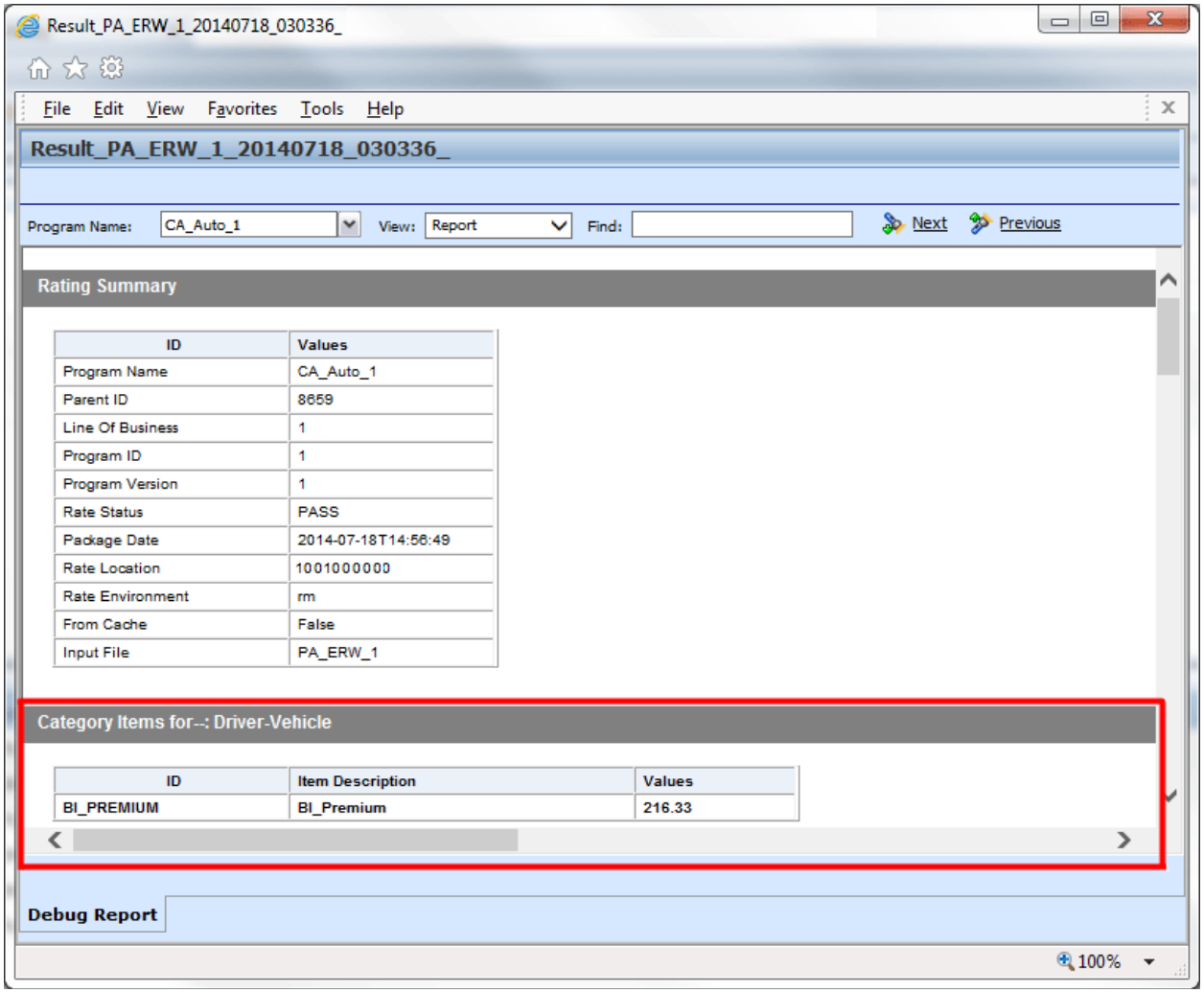



*Figure 19 Rating Report with Debug*

### 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.

The Program Inputs can be viewed in the Insbridge XML Viewer by clicking Click to view Insbridge XML.

## Debug Rating Report

The Debug Rating report includes detailed information about every algorithm, calculated variable and table variable executed.

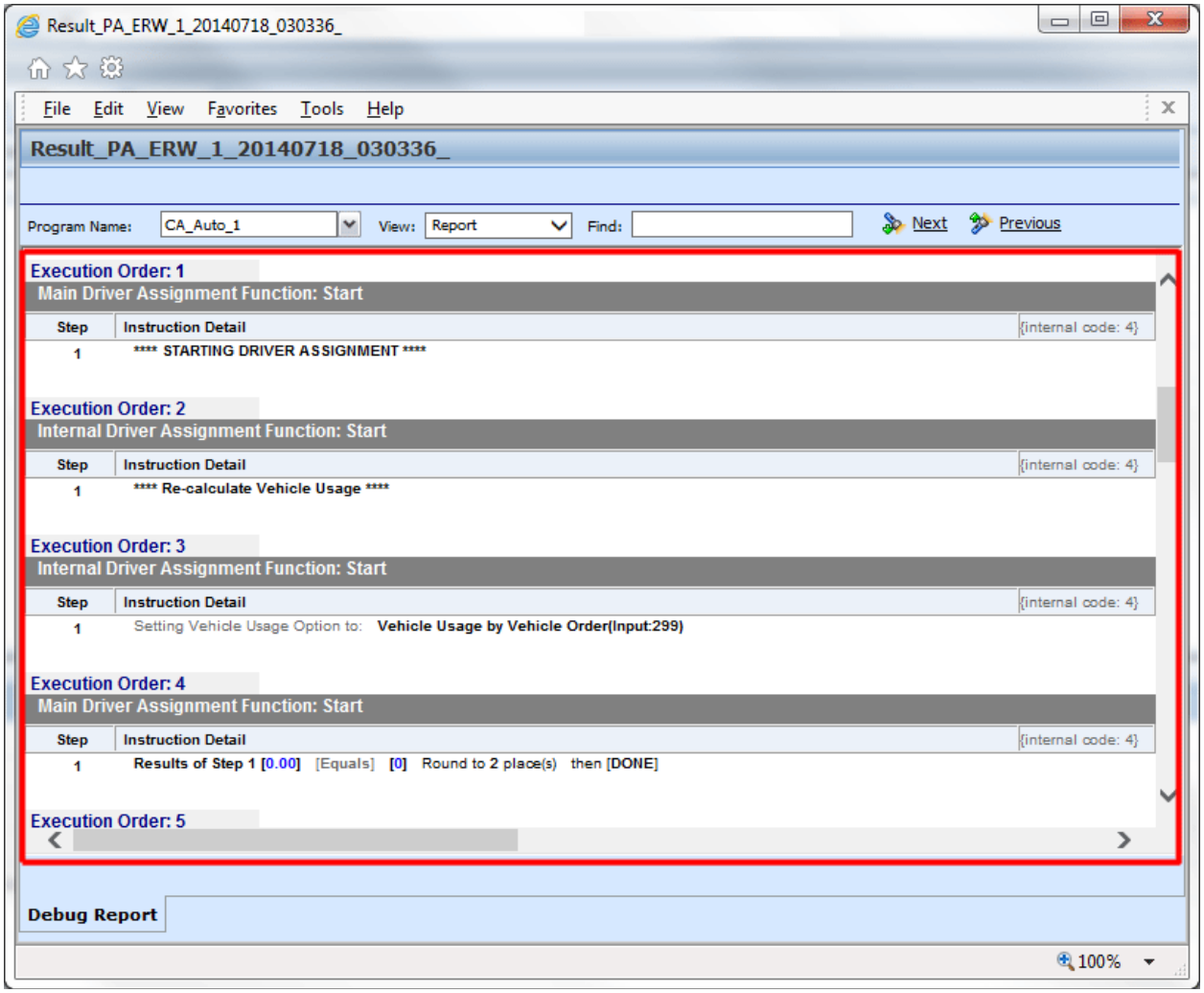



*Figure 20 Debug Report showing Execution Order*

Each element has:

- **Execution Order**: At the top of the field.
- **Element Type**: The gray bar contains the element type, the working category and the instance. If there is only one instance, the value is not 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

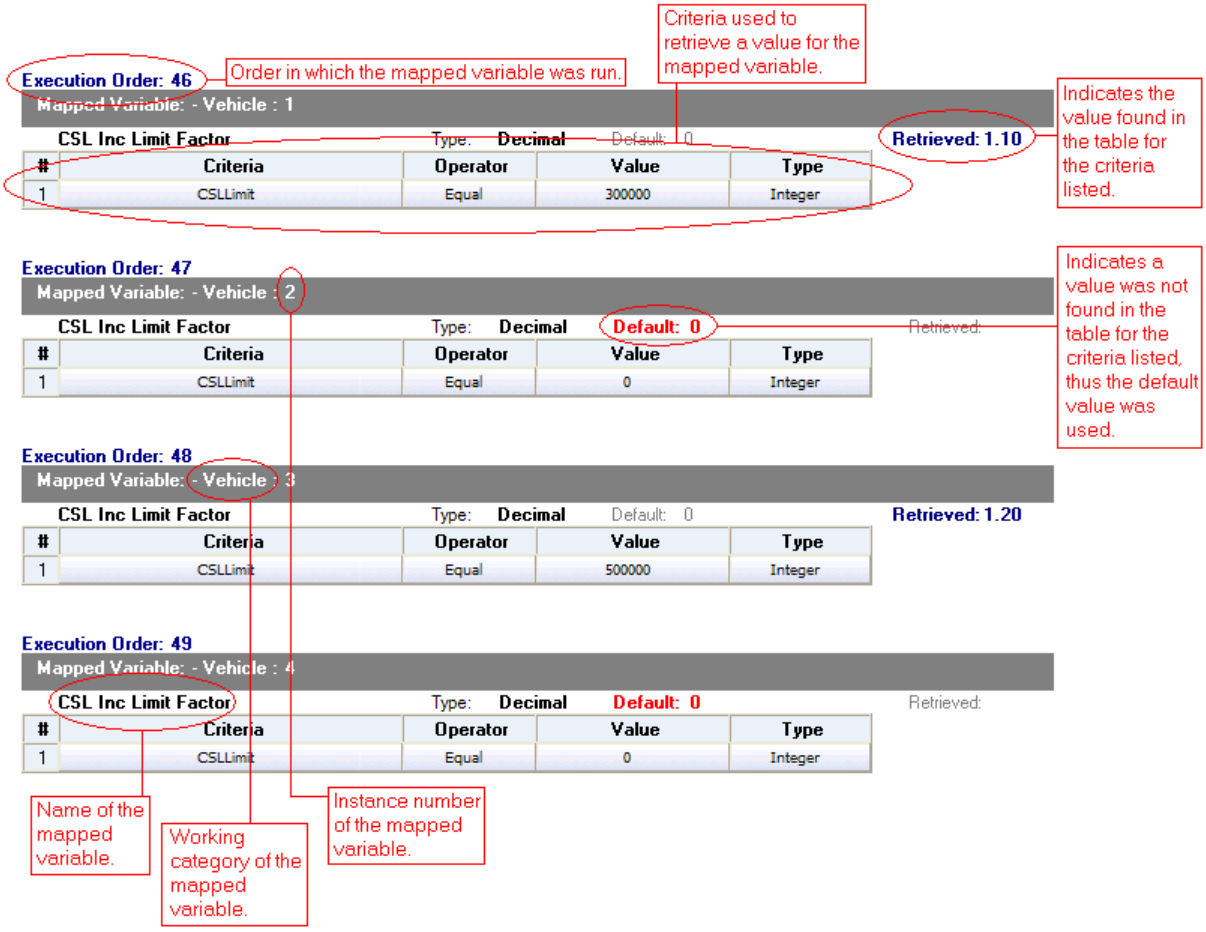



*Figure 21 Debug Rating Report with Table Variable Highlighted*

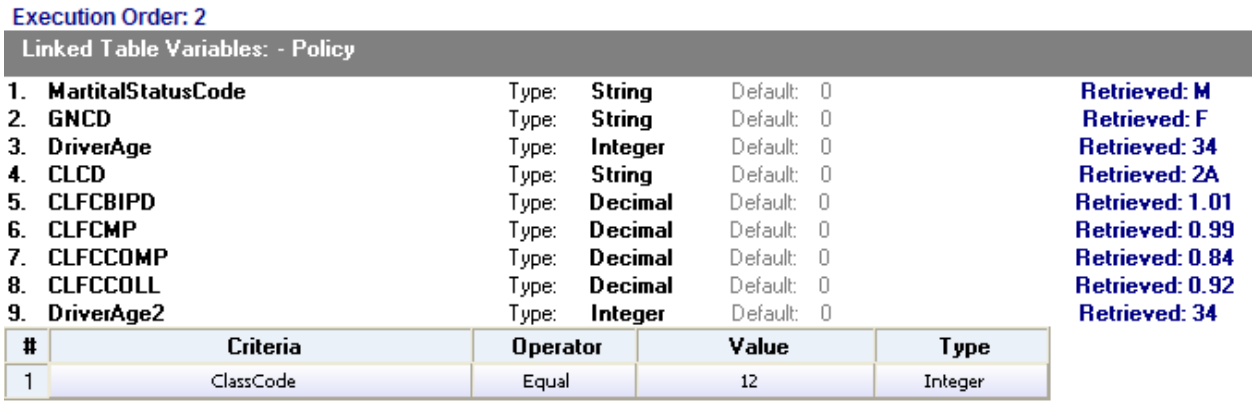



*Figure 22 Linked Table Variable in a Debug Report*

## How an Algorithm/Calculated Variable is shown on the Debug Rating Report

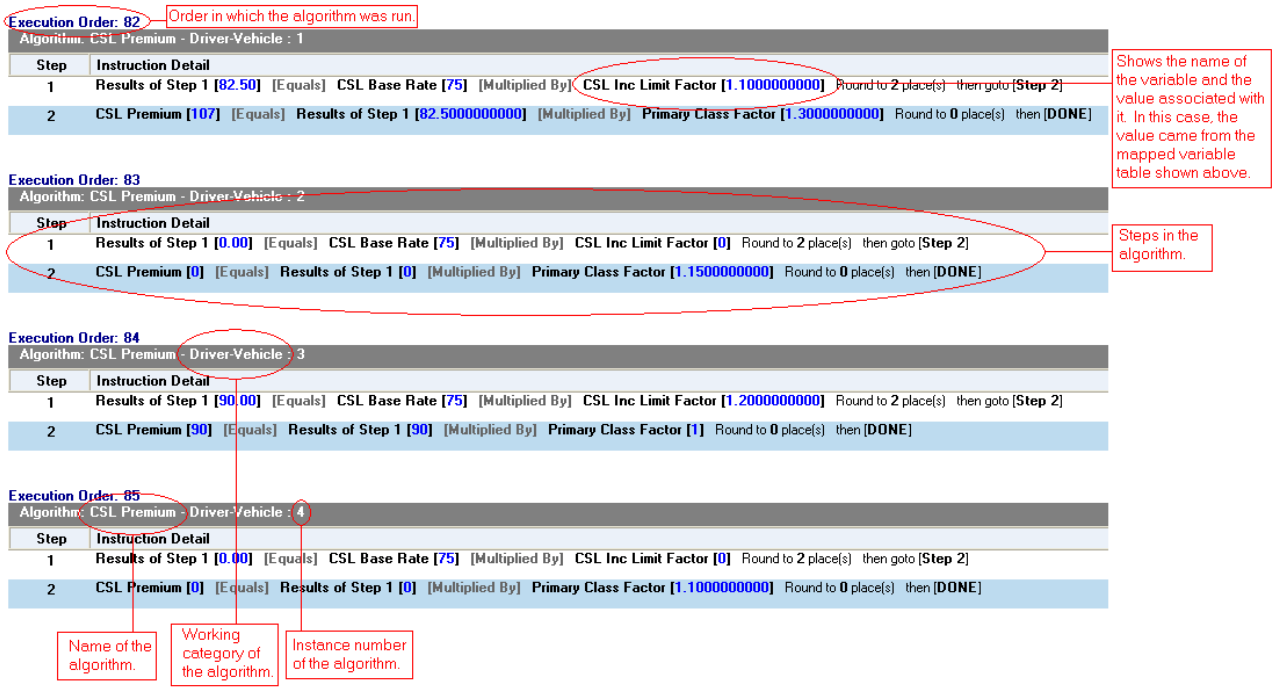



*Figure 23 Debug Rating Report with Algorithm/Calculated Variable Highlighted*

## How an Underwriting Rule is shown on the Debug Rating Report

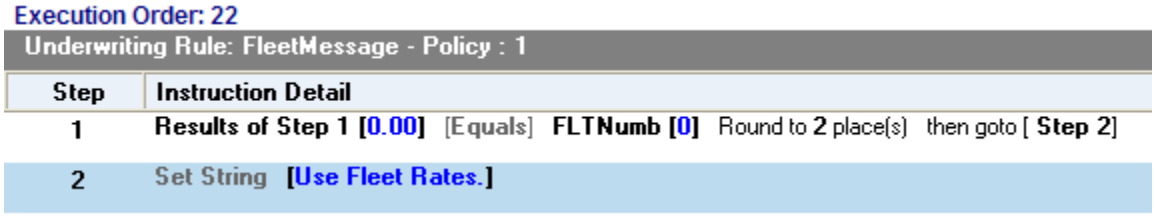
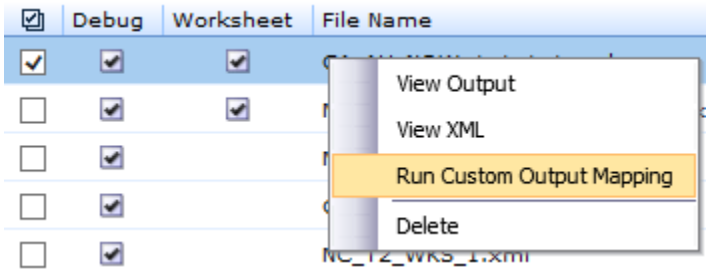



*Figure 24 Underwriting Rule in a Debug Report*

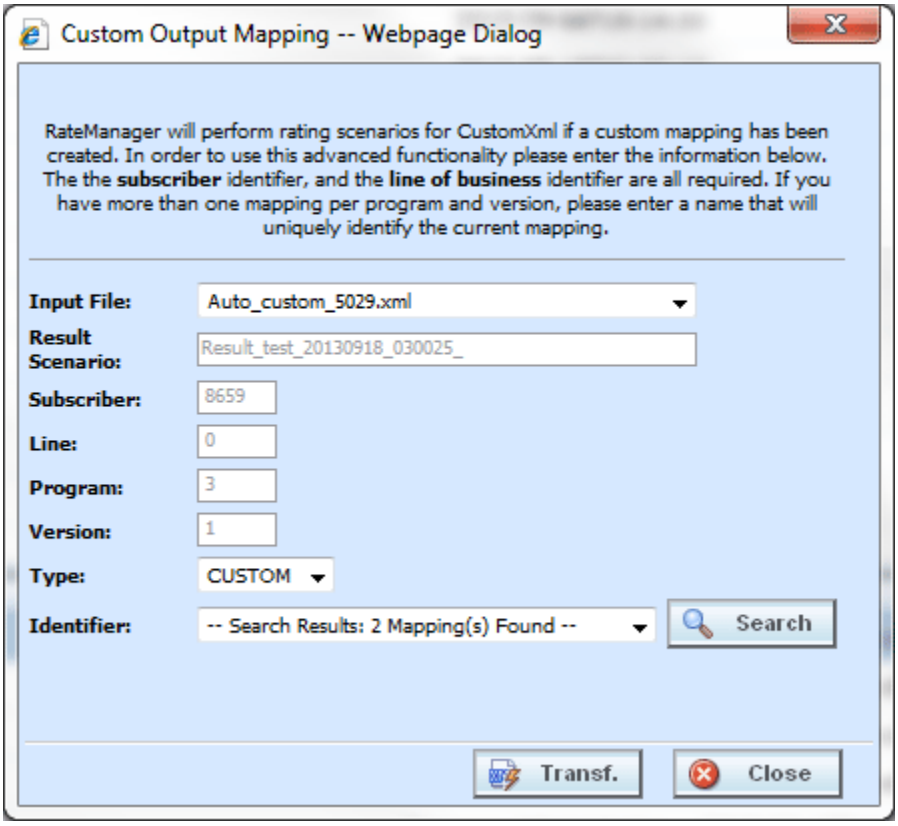
## Run Custom Output Mapping

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 two options; 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 is displayed.

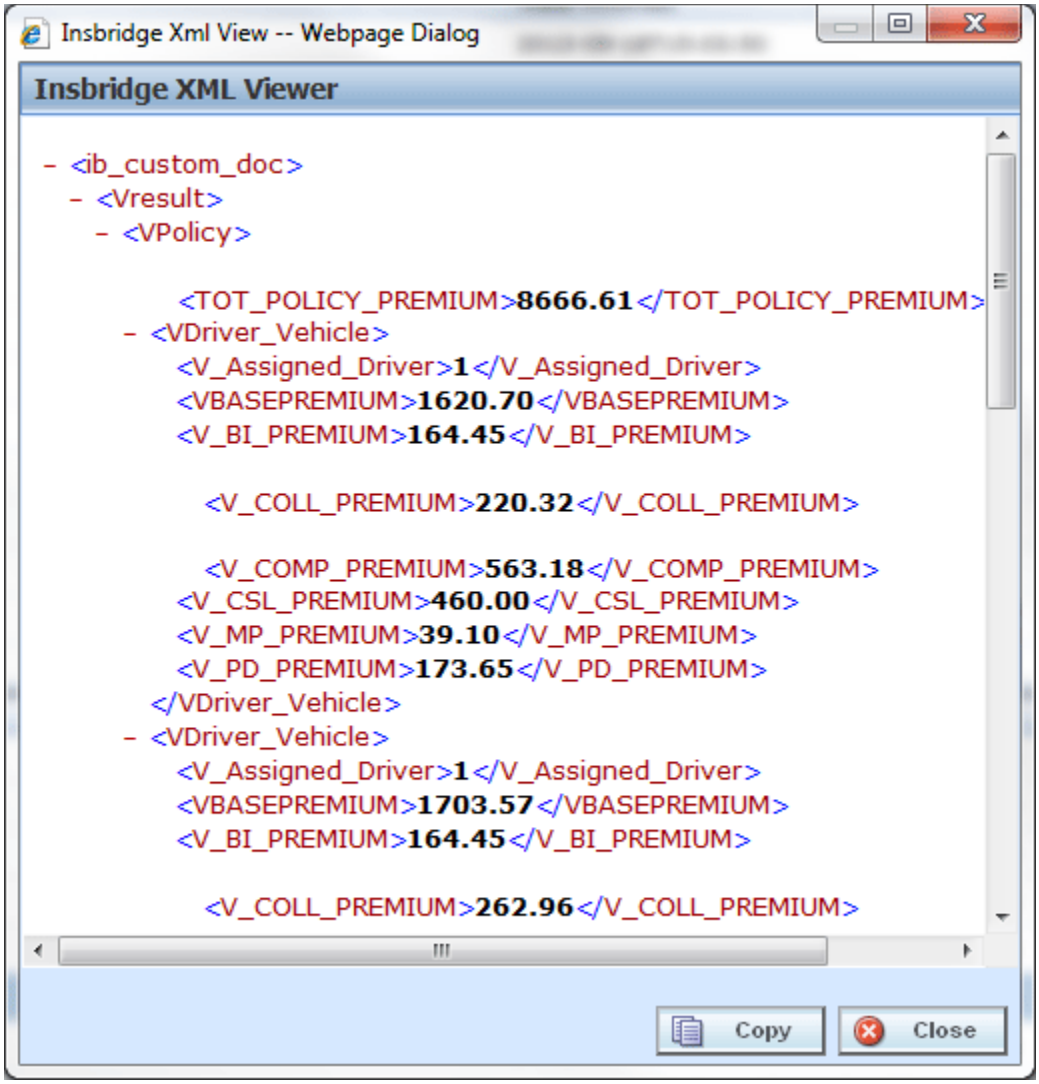



*Figure 25 Using Custom Output Mapping*

8. Your file is associated with the custom XML output mapping you selected. The result is ready to be viewed.

## 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**.

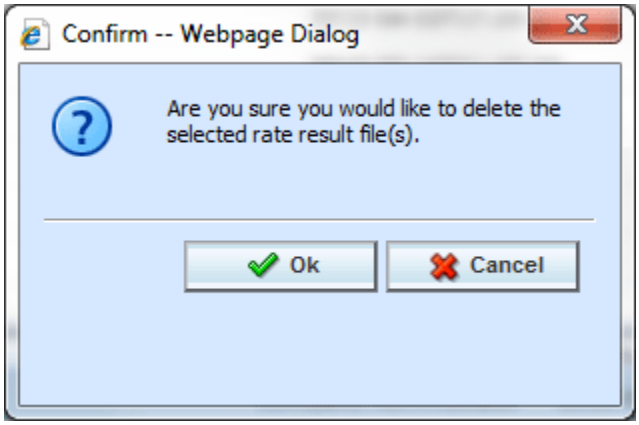



*Figure 26 Deleting a Result File*

3. A warning message is displayed. Click **OK** to remove the file. If this is not the screen you want click Cancel.
4. The file is 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.

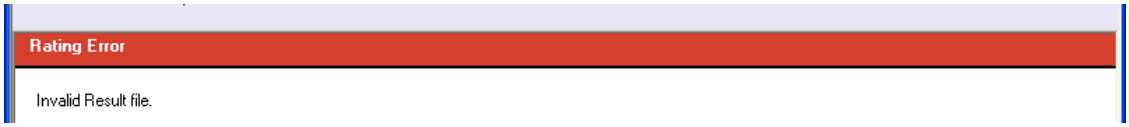



*Figure 27 Report Errors*

### Errors when Rating a File

You might receive an error when they try to rate a file.

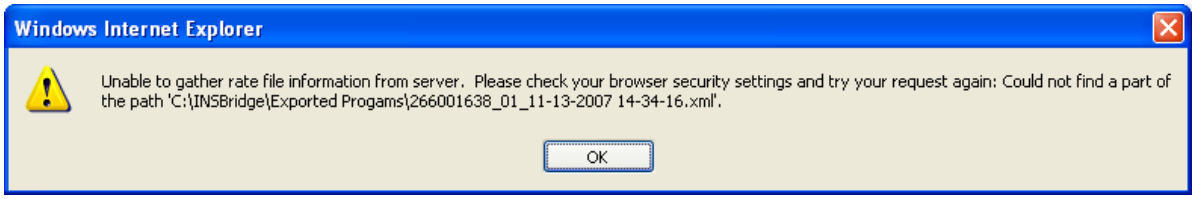



*Figure 28 Error Message for Rating a File*

### There are three possible causes of this error:

1. The file is located on a computer (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 can 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.

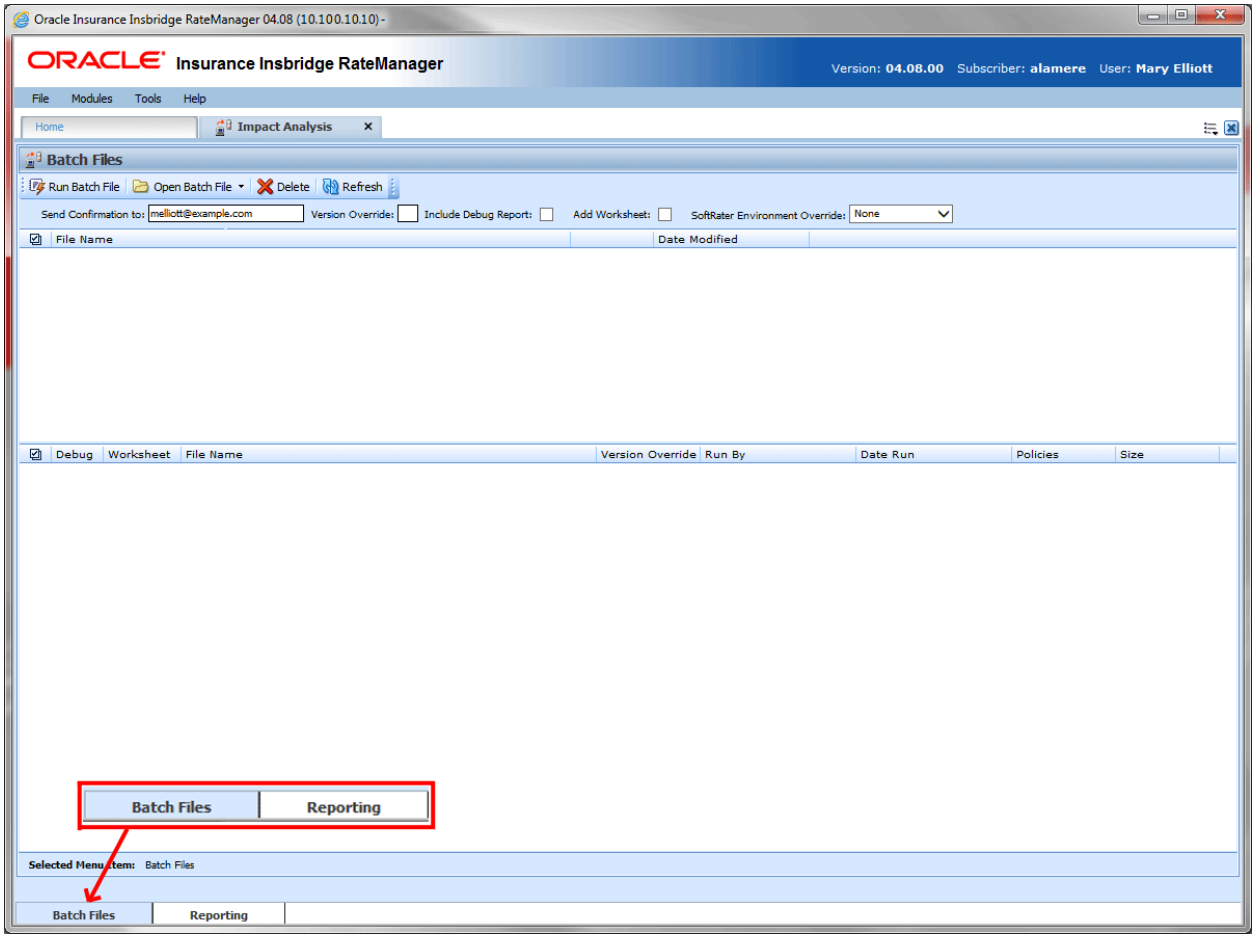



*Figure 29 Impact Analysis Tab*

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

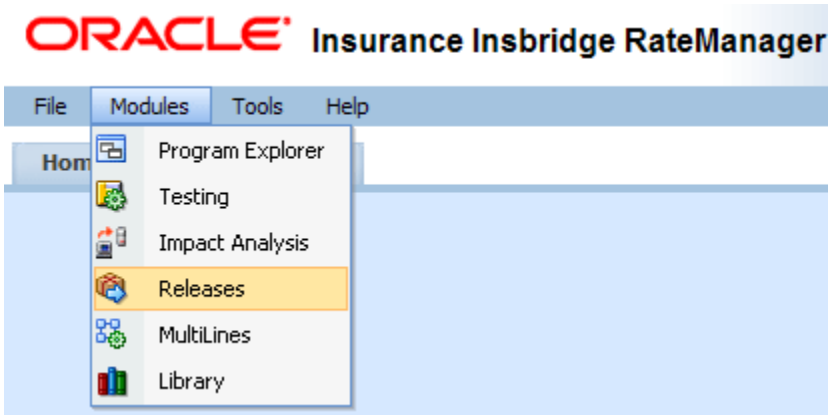
# PREPARATION

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 computer 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 IBER 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 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 30, (<ibdoc> is used as the XML wrapper):

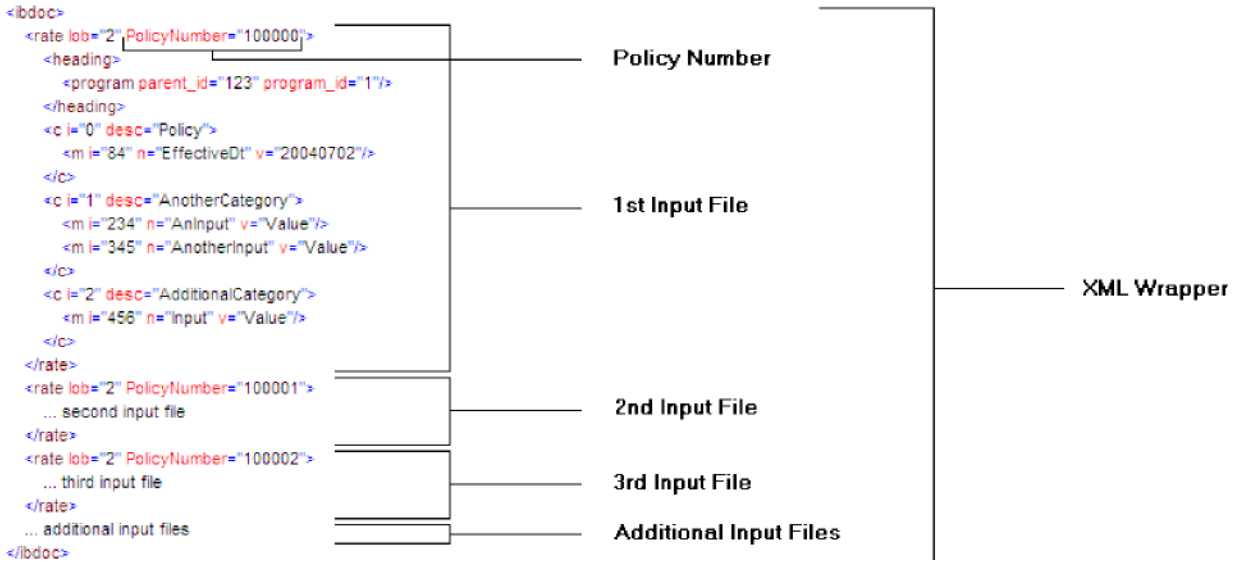



*Figure 30 Example of a Batch XML File*

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 than 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 causes 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 Enterprise Rating 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

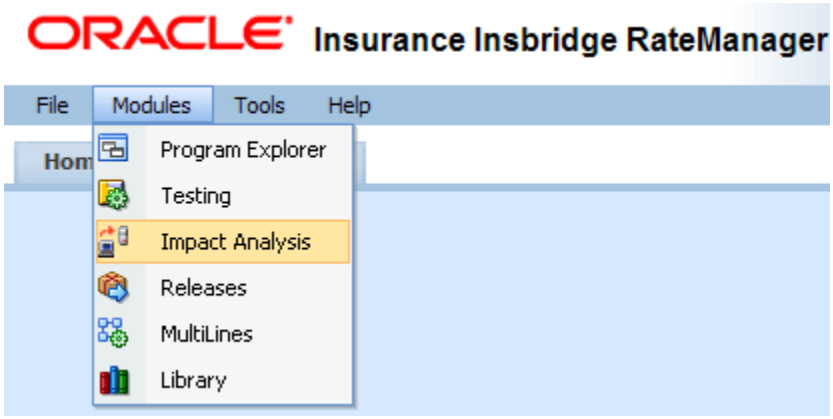
In Batch Files, the results are set to form one continuous string. If you want to add a break between results, you must go to RateManager.

To set Batch Results with a New Line enter RateManager and go to Tools. On the Preferences page (Tools→Preferences) is 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 results in one continuous string without a break. Please see the RateManager Tools User Guide for more information.

## Navigating to Impact Analysis

1. Select Modules→**Impact Analysis**.




2. This opens the Impact Analysis→**Batch Files** sub-tab. The default view is Batch Files. To go the Reporting, click the **Reporting** sub-tab.

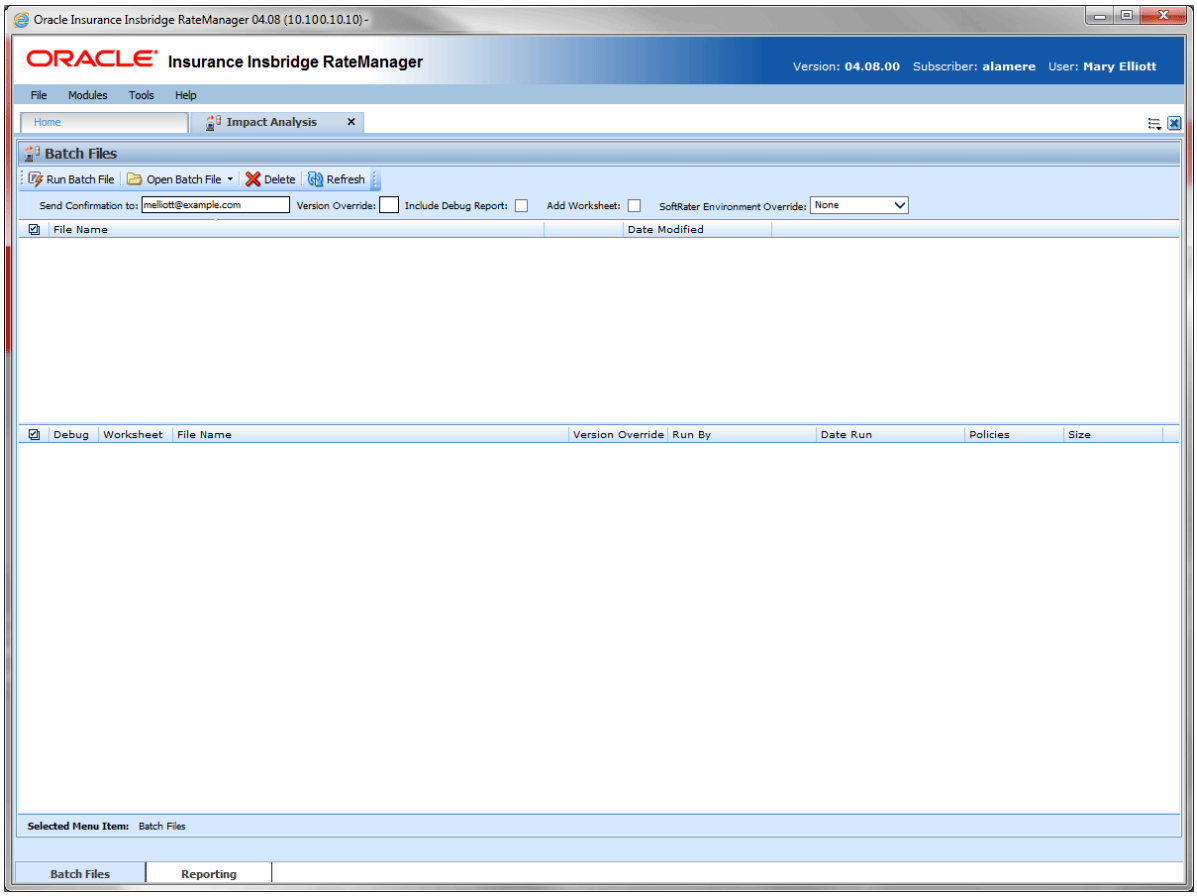



*Figure 31 Impact Analysis Batch File*

# BATCH FILES

The first sub-tab is Batch Files. Batch Files is where you 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.

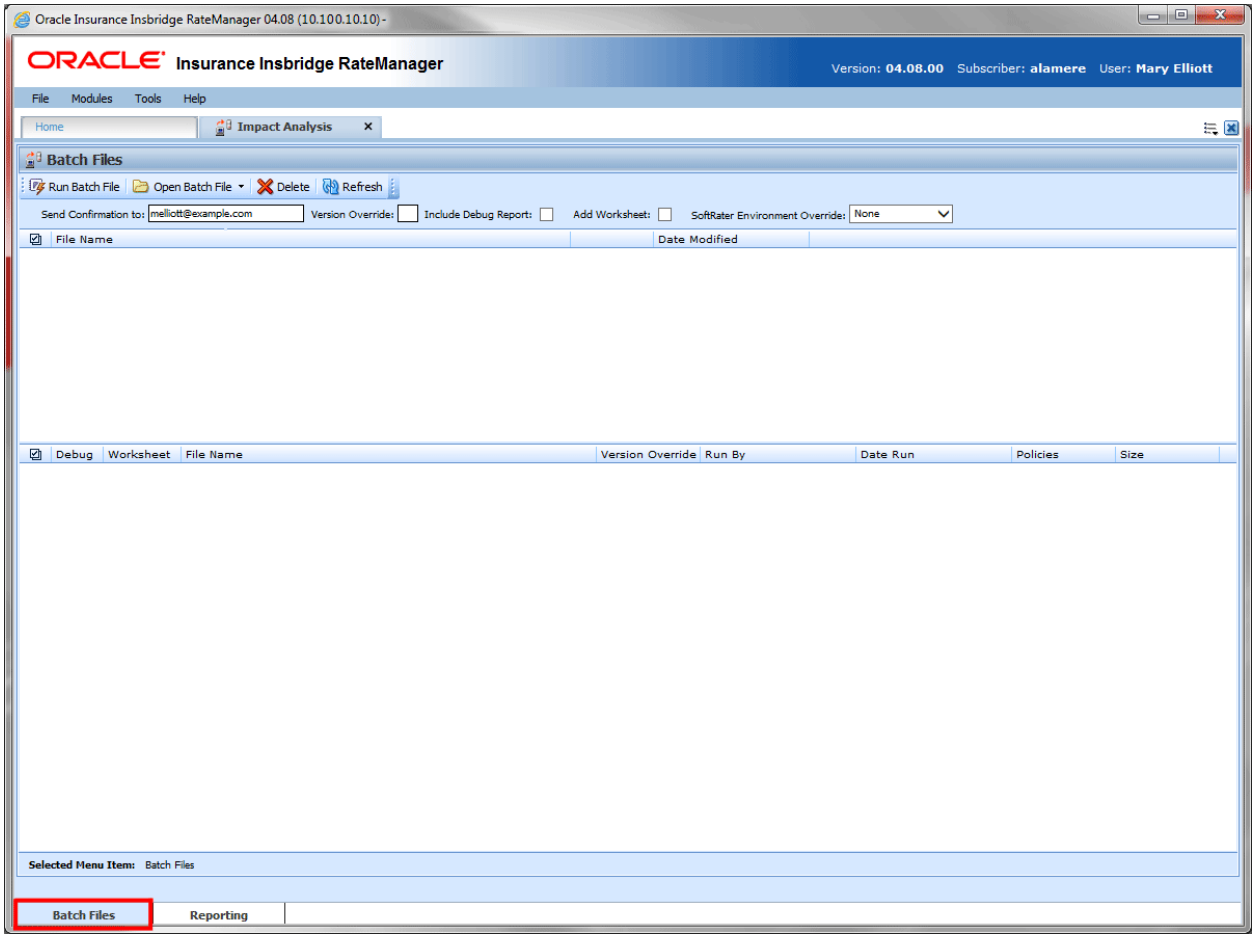
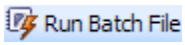
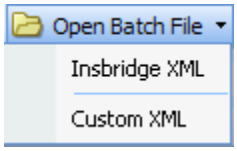
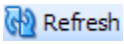



*Figure 32 Batch Files Sub-Tab*

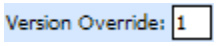
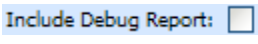
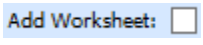
# FUNCTIONALITY

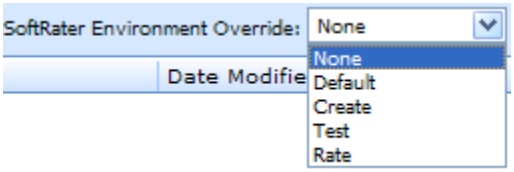
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

| | |
|---|---|
|  | **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.<br><br>**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:<br><br>• **Insbridge XML:** Opens a browser window where you can select a file that is in Insbridge.XML format.<br><br>• **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).<br><br>**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 receives notification when the rating is complete. If an admin email has been entered in IBFA, that email is used.<br><br>**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.<br><br>**NOTE:** *Batch files that are run with the debug option will not be available for use by the Reporting sub-tab.* |
|  | **Add Worksheet:** If you want to add any worksheets associated with the programs, check to add worksheet. |

| | |
|---|---|
|  | **SoftRater Environment Override:** Choose this option if you want to override the rating environment.<br><br>• **None**: no override is used. You also can use this option when you want to use the defined environment in your ratings.<br>• **Default**: selects the default environment.<br>• **Another Environment**: if other environments have been entered, you may select one of those.<br><br>**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.

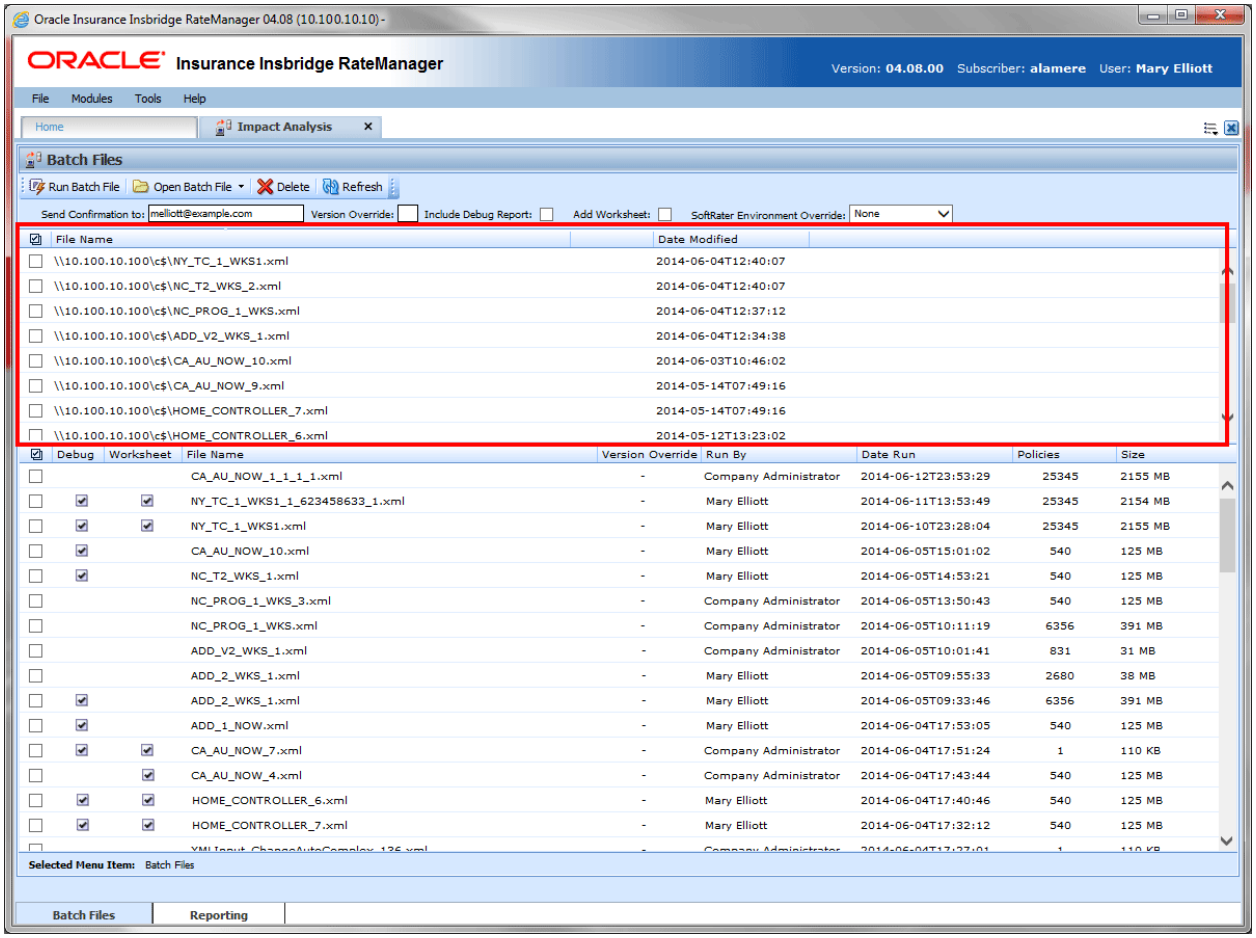



*Figure 33 XML Input File Listing Area*

**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.

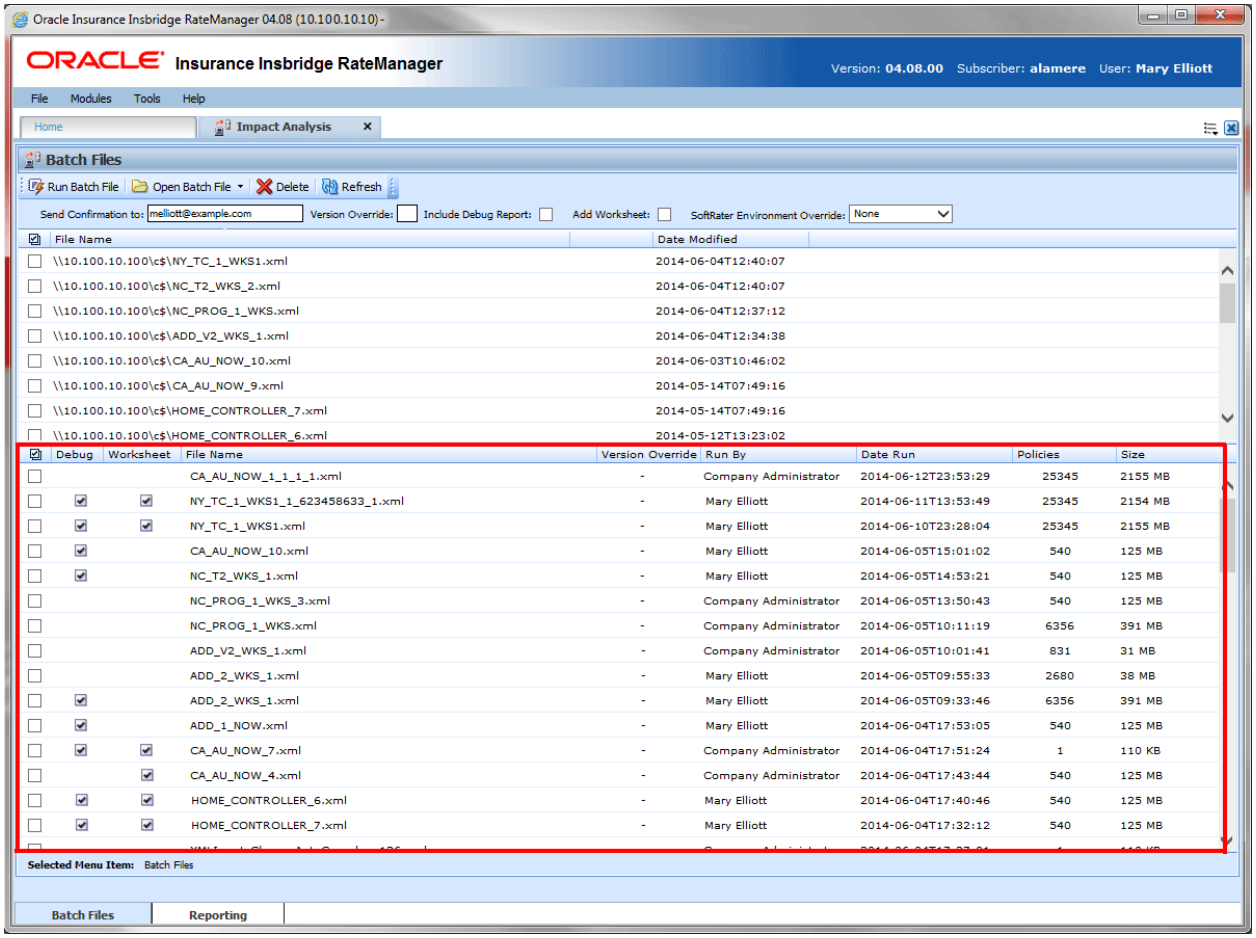



*Figure 34 Result File Listing*

**Check Box:** Used to select multiple files to delete.

**Debug:** A checkmark indicates the result file is a full debug report. This report is not listed on the Reporting sub-tab.

**Worksheet:** A checkmark indicates that the worksheets associated with the programs are included.

**File Name:** The name of the result file.

**Version Override:** Displays the version override that was used. A hyphen in the column indicates that no version override was used.

**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 has right click menu options. To view the right click menu options, select the file you want and right click.

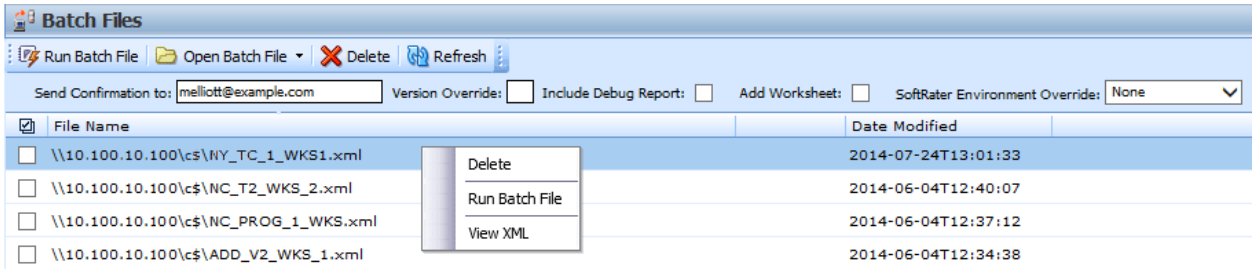



*Figure 35 Right Click Menu for the XML Input File Listing*

The **XML Input File Listing** has three choices:

- **Delete:** Removes the selected file.
- **Run Batch File:** Rates the selected file.
- **View XML:** Allows you to view the selected XML file. Multiple files cannot be viewed.

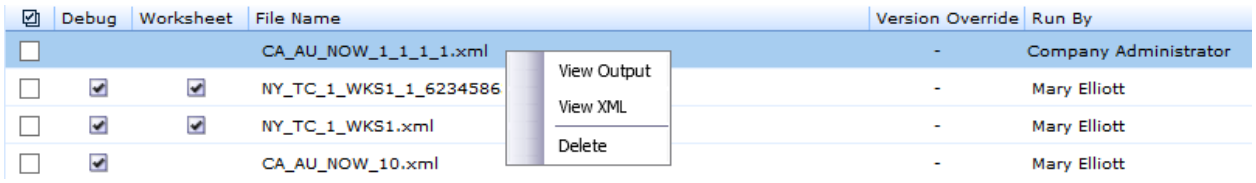



*Figure 36 Right Click Menu for Result File Listing*

The **Result File Listing** has 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. If an admin email has been entered in IBFA, that address is displayed.
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 include a debug report with this batch, check **Debug Rate**.
4. If you want to add the worksheet associated with the program, check Add Worksheet.
5. If you want to override the SoftRater rating environment, choose the environment you want from the listing.
6. 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.
7. If the file to be rated in not listed, click **Open Batch File** and select **InsBridge XML**. A browse box opens for you to select the file to rate.

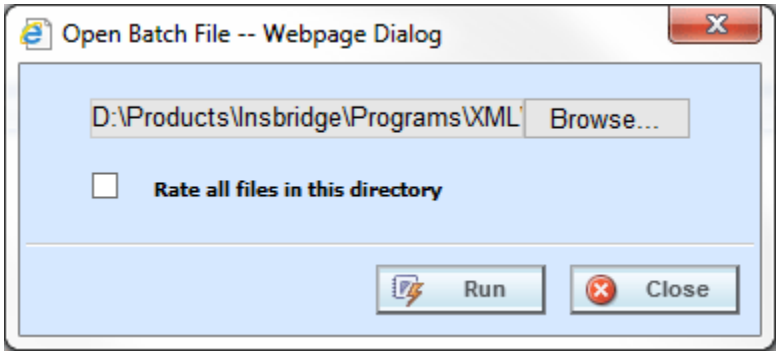



*Figure 37 Entering a Batch File Name*

8. If the file location is a directory, check the Rate all files in this directory option. When you are finished, click **Run**.
9. A message notifies you that your request has been submitted for processing.

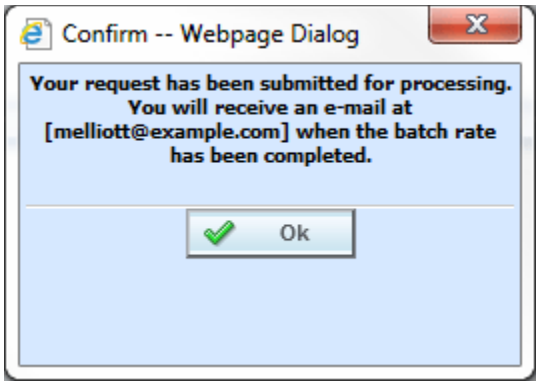



*Figure 38 Confirmation Message for Batch Rate Request*

8. The send confirmation email address receives an email when the file is finished rating. The result file is displayed in the lower portion of the screen and 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 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. If an admin email has been entered in IBFA, that address is displayed.

2. Leave the **Version Override** box blank. You will select the version to use in the batch file details.

3. If you want to include a debug report with this batch, check **Debug Rate**.

4. If you want to add the worksheet associated with the program, check Add Worksheet.

5. Leave the **SoftRater Environment Override** to **NONE**.

6. 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.

7. If the file to be rated in not listed, click **Open Batch File** and select **Custom XML**. A separate screen is displayed where you can select the file to rate.

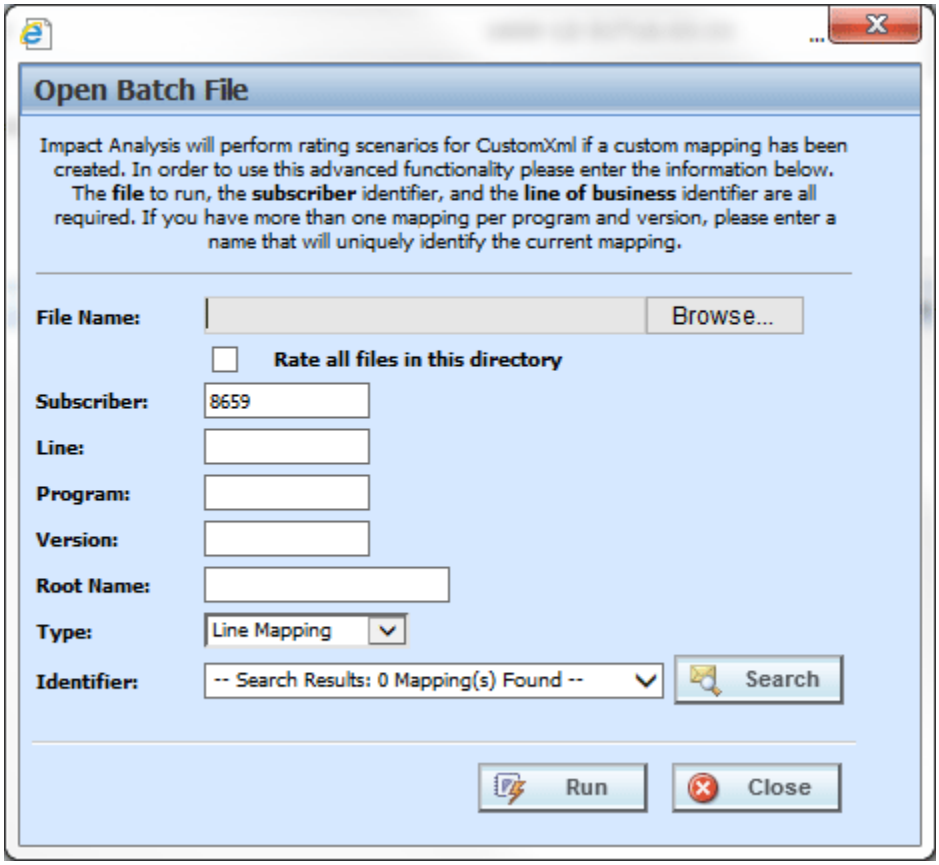



*Figure 39 New Rate Custom Batch File Dialog Box*

8. 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.*

9. If the file location is a directory, check the Rate all files in this directory option.

10. Enter in the **Line**, **Program** and **Version** numbers. The Subscriber number defaults to your current number.

11. 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 40, **Quote** is the element that marks the beginning and end of each quote.

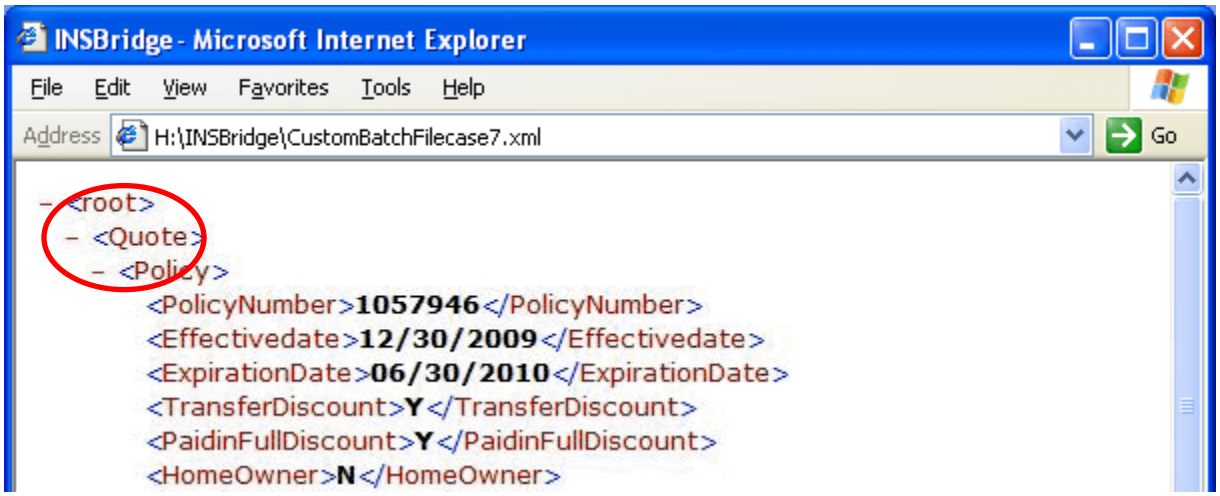



*Figure 40 Example Custom Batch File*

12. Select the input mapping **Type**. There are three options; Line, Version, and Custom. Line uses XSLT created for the line (all inputs for the line), Version 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.

13. 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 are 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.

14. When you are finished, click **Run**. Your file will be rated and the result file will show in the result file listing.

15. A popup message notifies you that your request has been submitted for processing. If a different message is received, see Batch Errors.

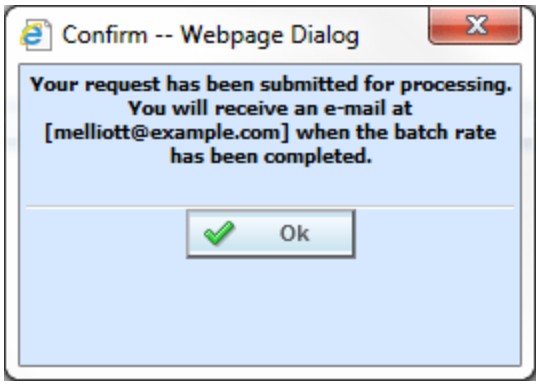



*Figure 41 Confirmation Message for Batch Rate Request*

16. The send confirmation email address receives an email when the file is finished rating. The result file is displayed in the lower portion of the screen and 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 are 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.*

## Rate All Files in This Directory

The directory path to the batch file cannot be edited manually. You must browse and select. To rate a group of files in a directory, you must check the "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 is modified, replacing the file name with an asterisk.

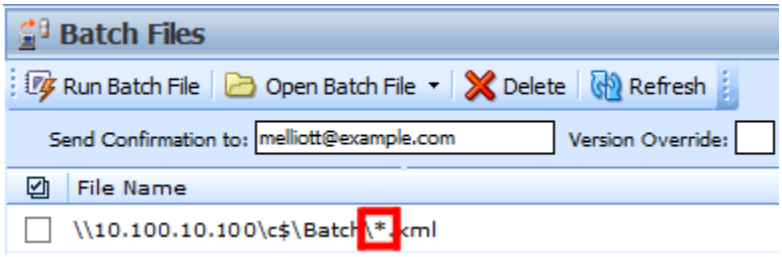



*Figure 42 Asterisk Denoting to Rate All Files*

## 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.

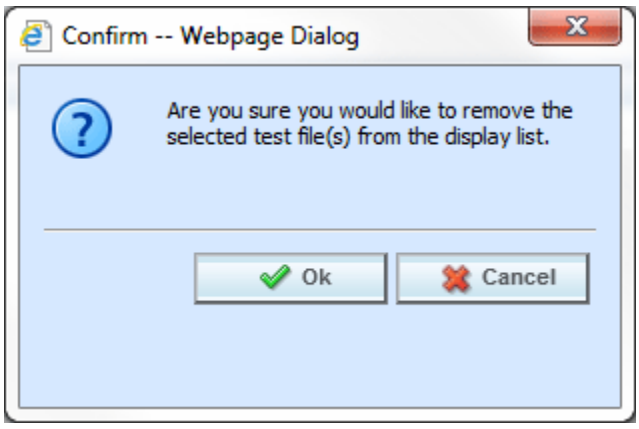



*Figure 43 Delete Input File Message*

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.

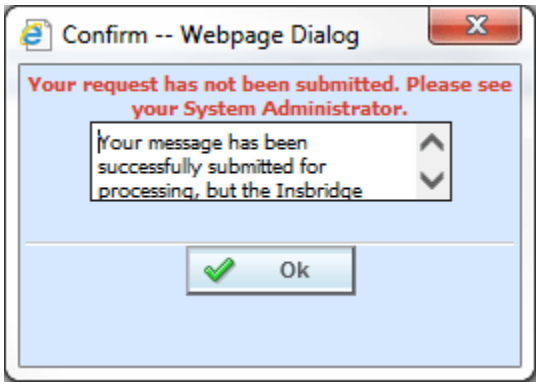



*Figure 44 Error Message for Batch Rate*

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.

### Failure to Run Error Message

If you receive a failure message when running Impact Analysis but are able to Batch, you may have an issue with the Controller database not being setup properly. If you have access, enter IBFA and verify that the controller database has been setup and that username and password are present. If you do not have access, please contact your system administrator to check the Controller database connection.

*Oracle Support* 5:39:21 PM Wednesday, October 02, 2013

Unable to process your request successfully.
Name: CAB Demo
BaseFile: C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\Webs\RM4\Workfiles\Rating\DS_775\Batch\ALL_DIR_FILES_20131002_053405_BATCH_0.xml
CompFile: C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\Webs\RM4\Workfiles\Rating\DS_775\Batch\ALL_DIR_FILES_20131002_053505_BATCH_0.xml
ResultFile: C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\Webs\RM4\Workfiles\Pricing\DS_775\CAB Demo_1380753556665.xml

**ERROR INFORMATION**

StackTrace: ...

Message: Login failed for user ''. The user is not associated with a trusted SQL Server connection.

# REPORTING

The second sub-tab is Reporting. 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.

- Scenarios 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.

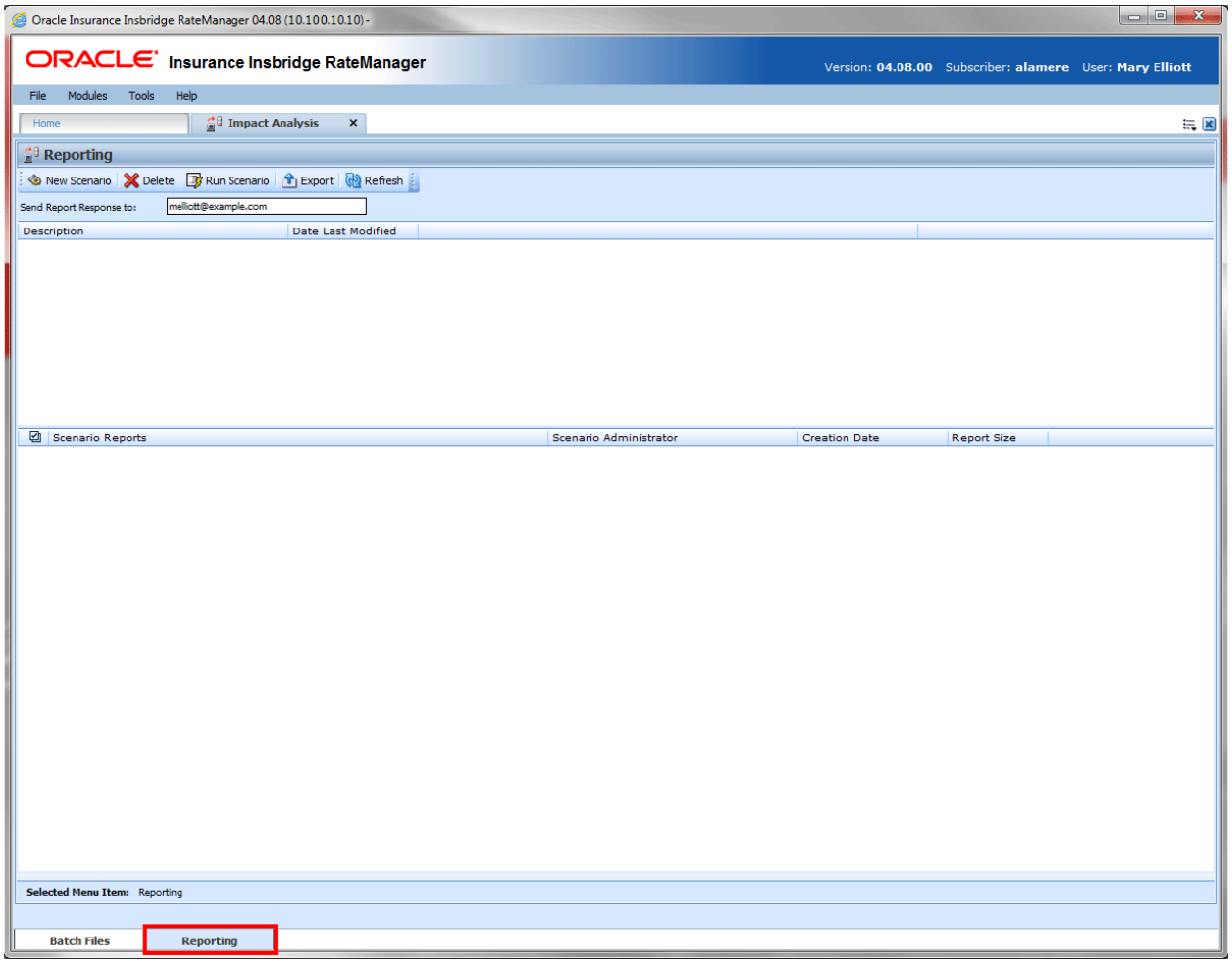
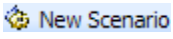
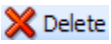
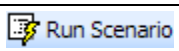
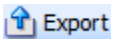
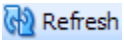


Figure 45 Reporting Sub-Tab

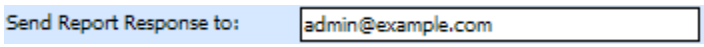
# FUNCTIONALITY

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.

| | |
|---|---|
|  | **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. |
|  | **Export:** Exports the selected scenario report in MS Excel format to a local drive or share. |
|  | **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. If an admin email has been entered in IBFA, that email is used.<br><br>**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.

### Right Click Options

There is one right click menu option for scenario reports. This option is only available in the Scenario Reports Listing area.

- **Rename:** Allows you to rename the selected report.

## 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.

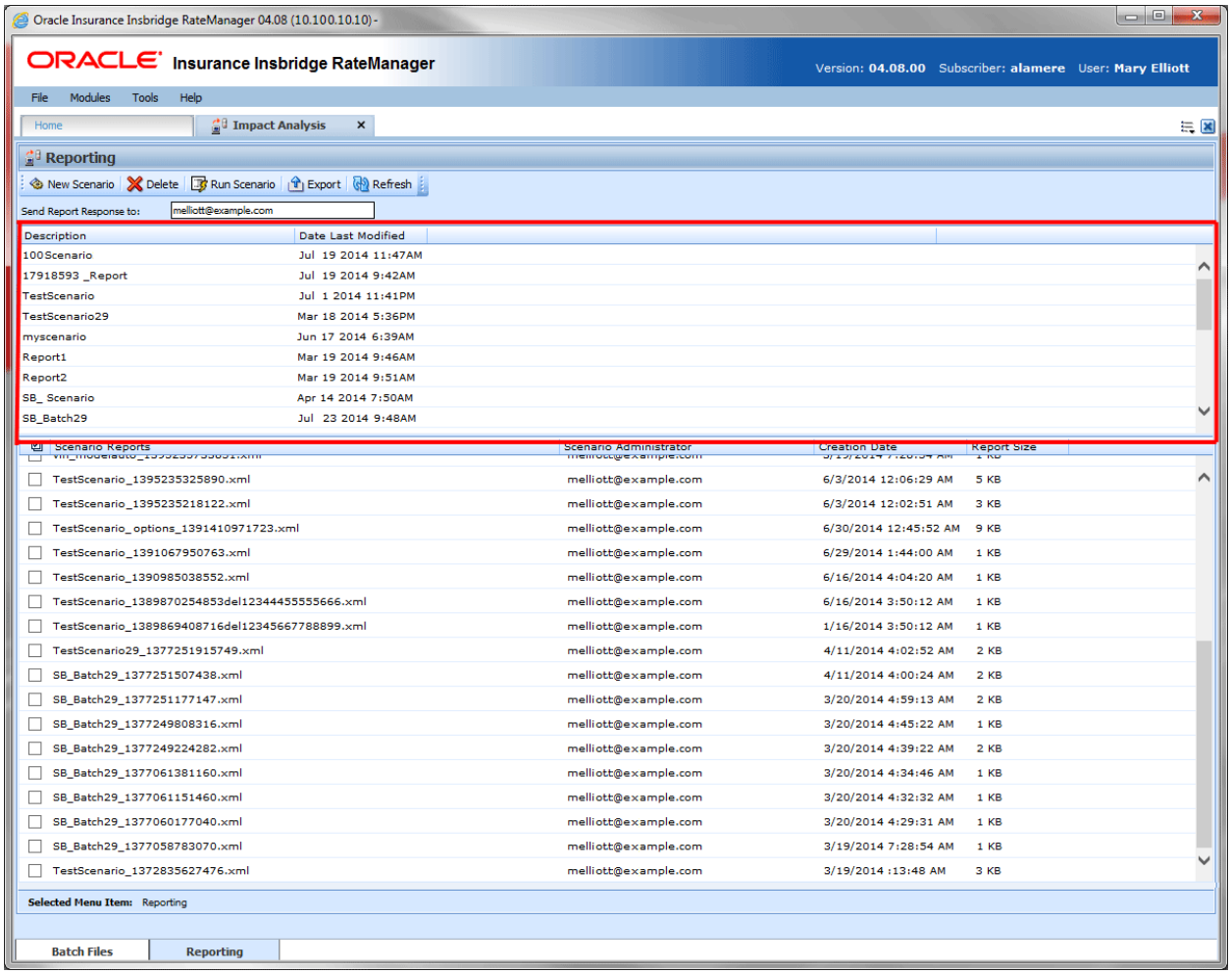



*Figure 46 Impact Analysis Scenario Listing*

## 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.

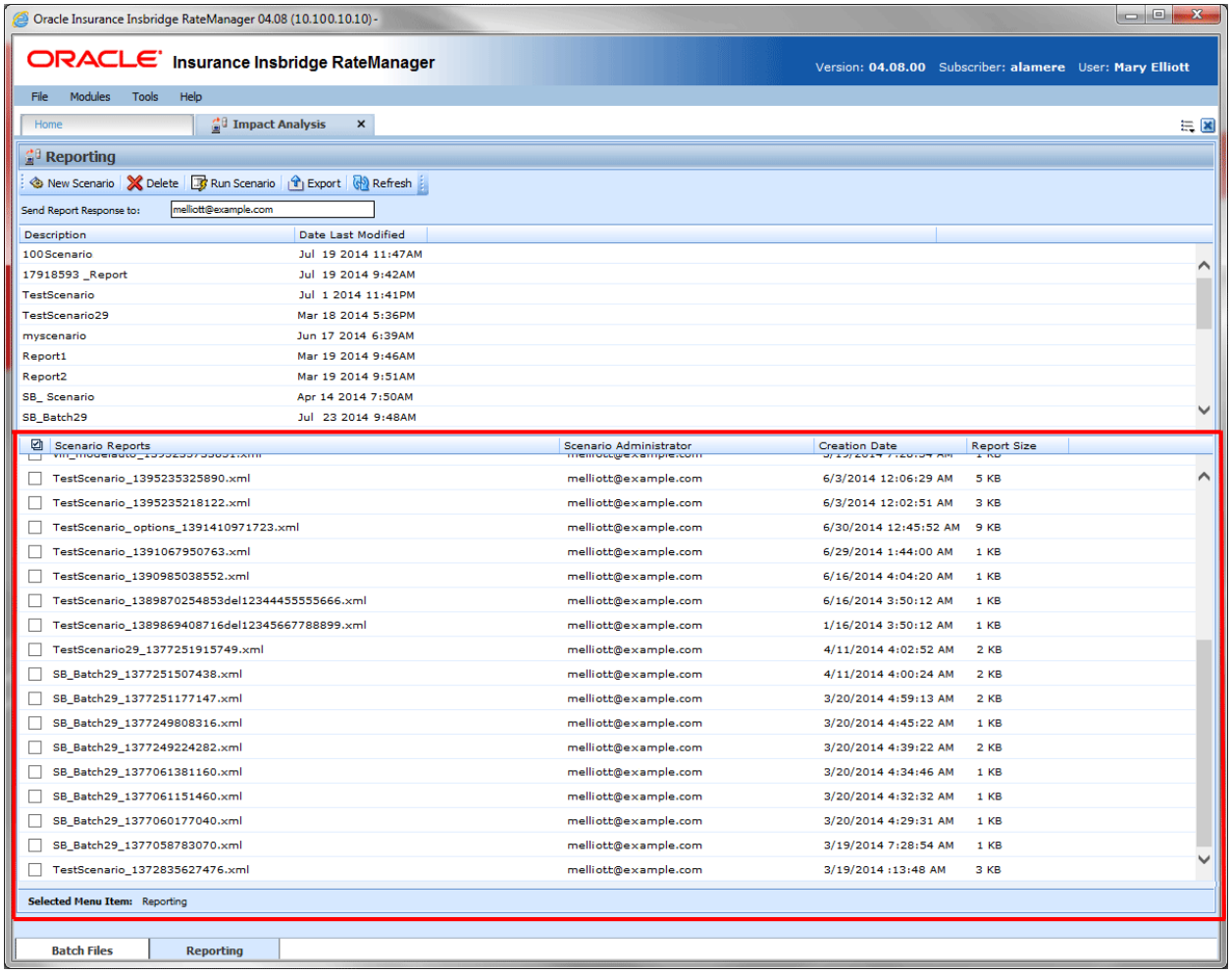



*Figure 47 Impact Analysis Scenario Report Listing*

# 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**.

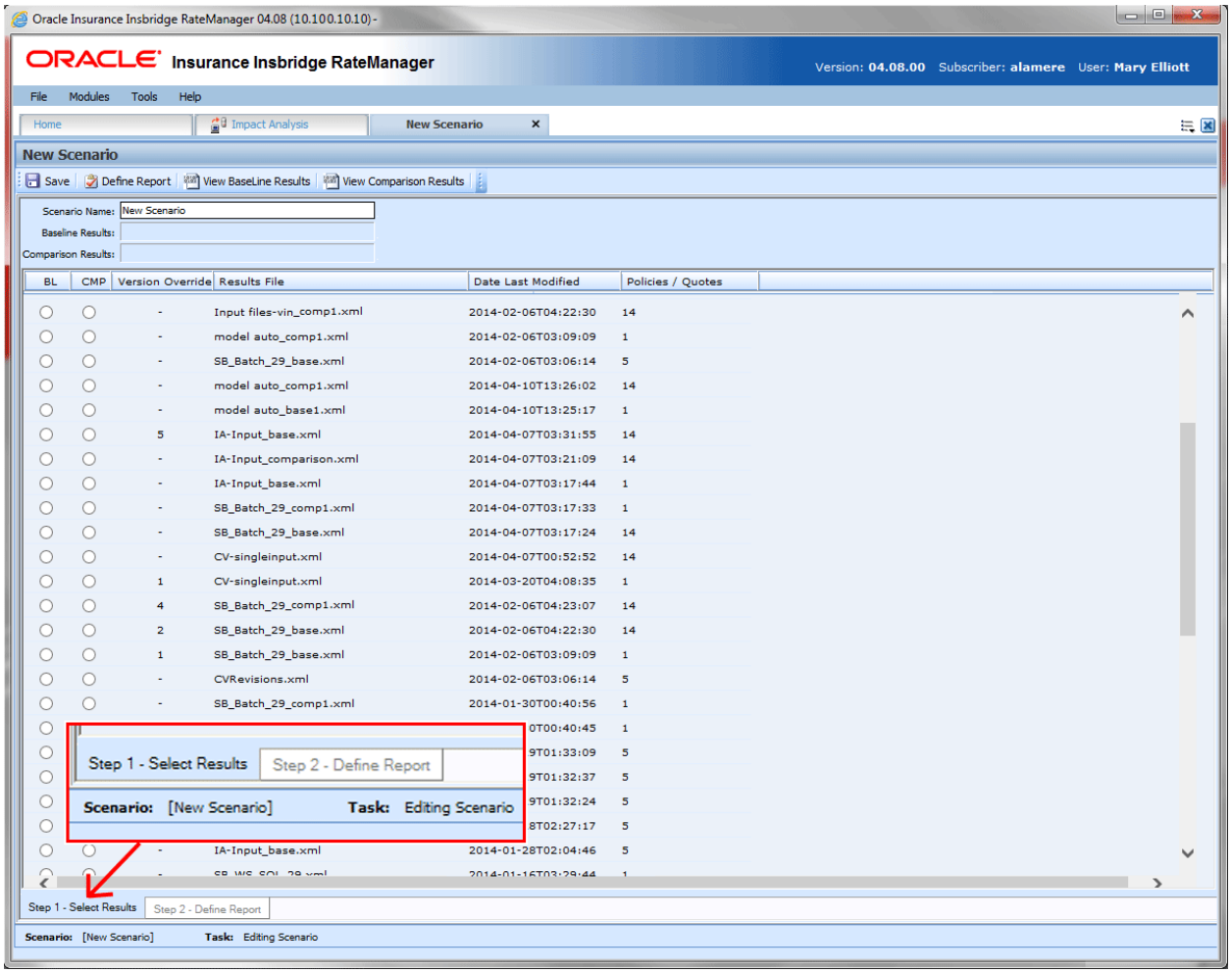



*Figure 48 Creating a New Scenario*

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.

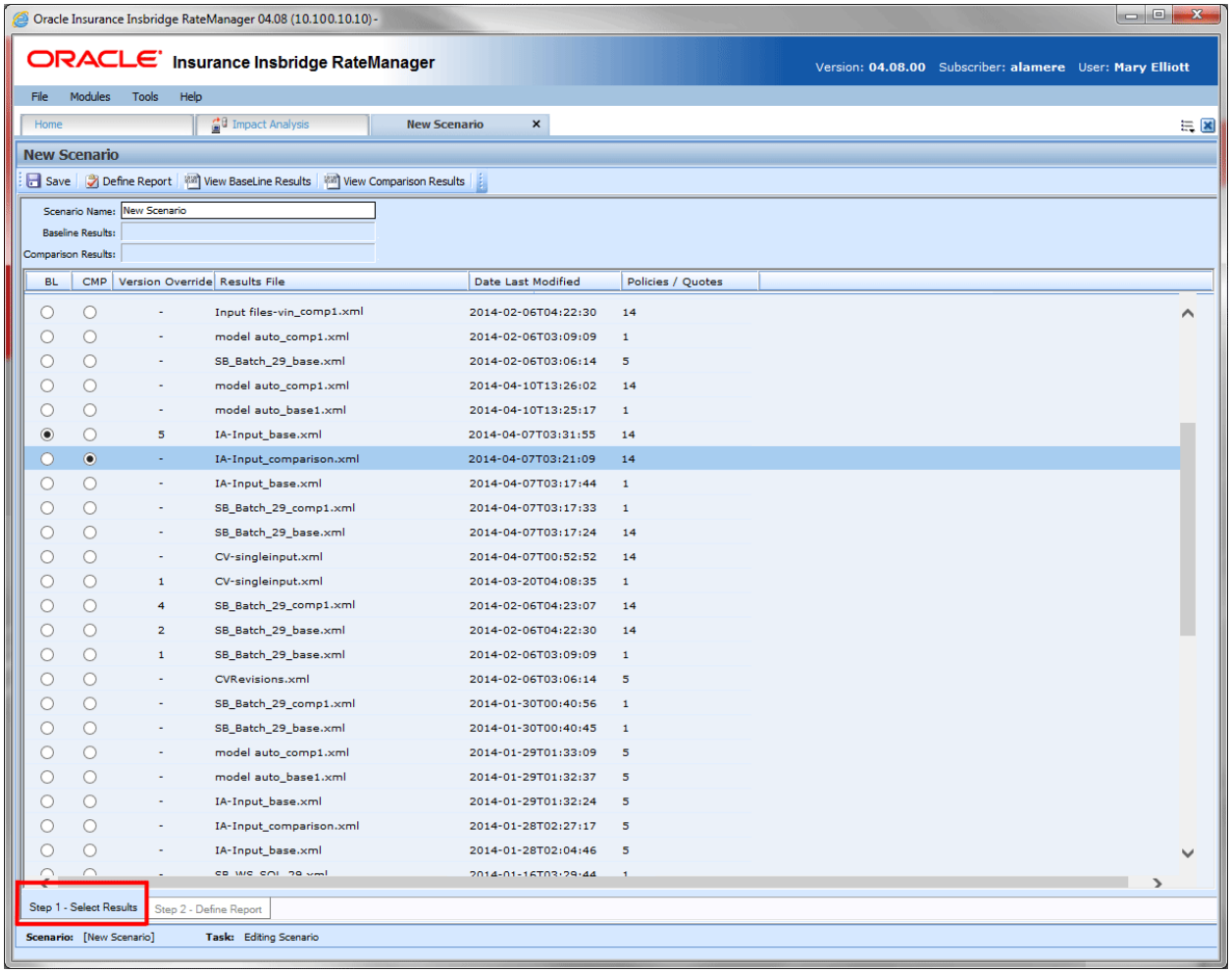
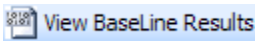
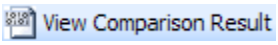


Figure 49 Step 1: Select Results

# FUNCTIONALITY

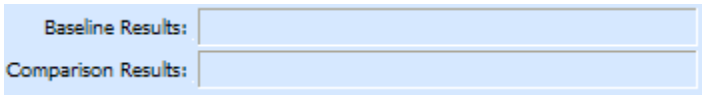
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this sub-tab as well as the definition options you can add.

| | |
|---|---|
| Save | **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 | **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.<br><br>**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.<br><br>**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.

**Version Override:** Displays the version override that was used. A hyphen in the column indicates that no version override was used.

**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.

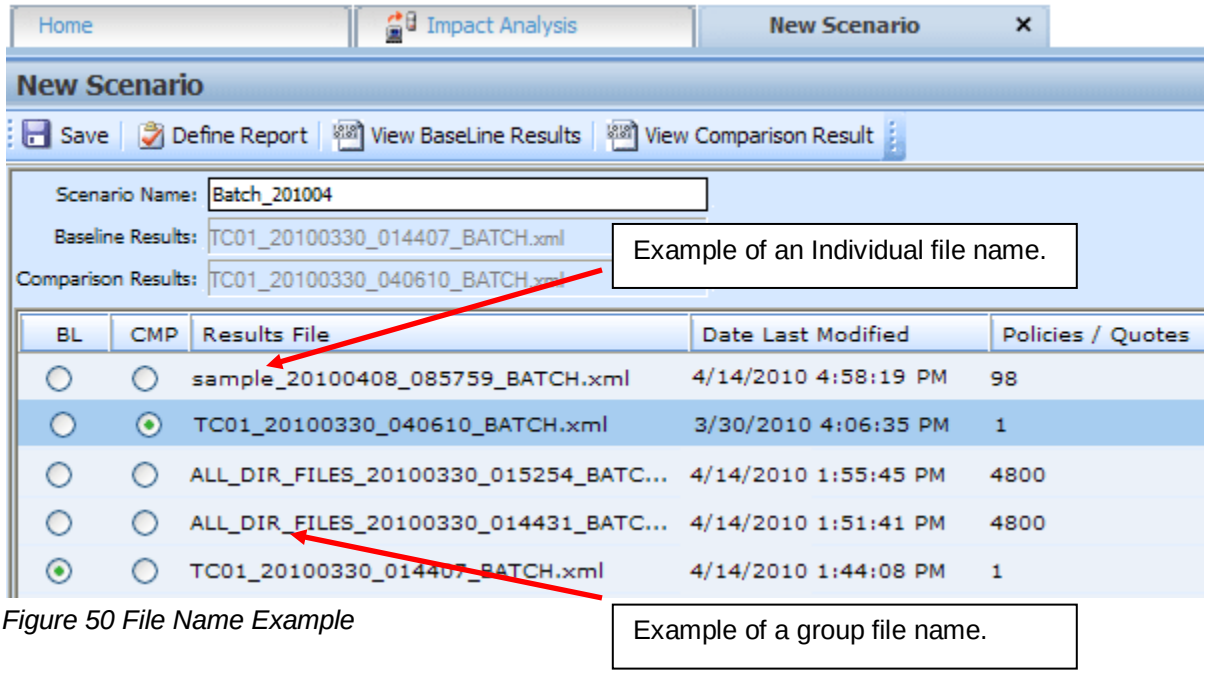



*Figure 50 File Name Example*

# 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.

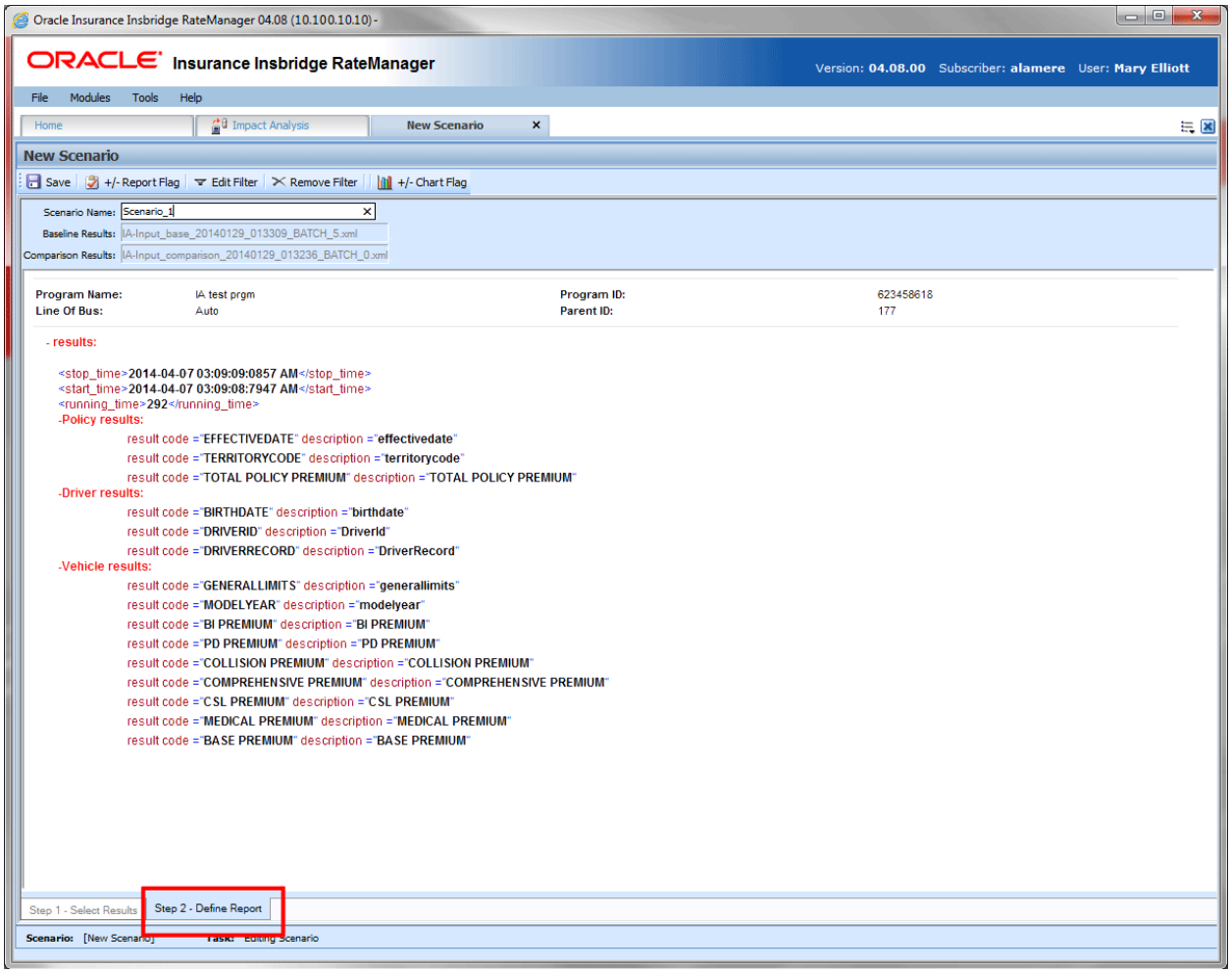
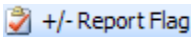
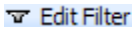
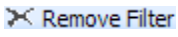
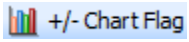



*Figure 51 Step 2: Define Report*

# FUNCTIONALITY

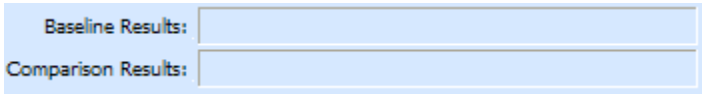
The **Menu Bar** is located at the top of the **tab**. The menu bar contains the functions you can perform on this tab as well as the definition options you can add.

### 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. |
|  | **Chart Flag:** Adds the selected flagged item to the report chart. |

### 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.<br><br>**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.<br><br>**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 is 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. A indicates that a chart flag has been set and the result will be displayed in a chart.
- 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 has right click menu options. To view the right click menu options, select the line you want and right click.

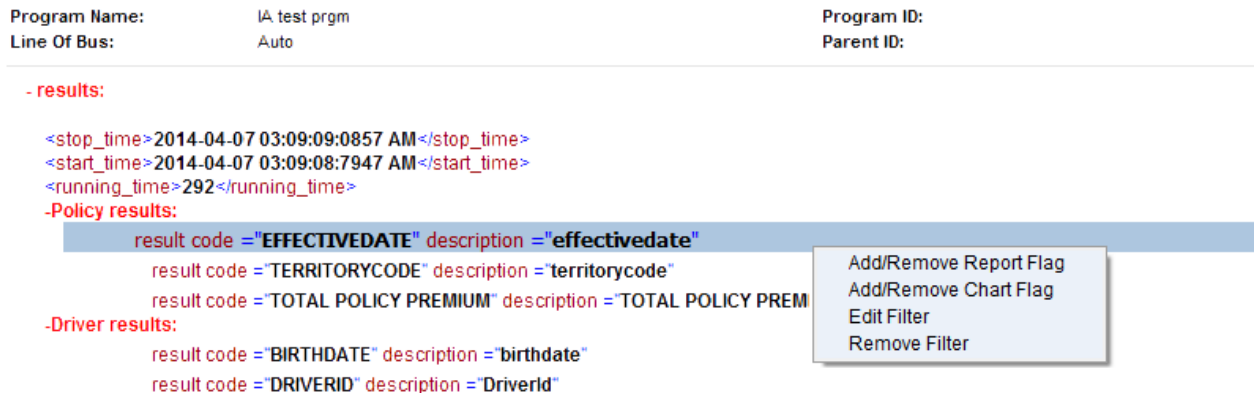



*Figure 52 Right Click menu for Step 2: Define Report*

**Step 2: Define Report** has four 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.
- **Add/Remove Chart Flag:** Adds or removes the chart flag from the selected flagged result. A chart flag also can be added or removed by double-clicking the Chart Flag button in the menu. Chart flags can only be added to flagged line items.
- **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.

# Setting Flags

In order for a result to show on an Impact Analysis report, it must have a flag. If a result appears multiple times for the same policy, all instances of the result are 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, if a report flag has been added to the Policy result TOTAL_POLICY_SDIP. For each vehicle on the policy, a TOTAL_POLICY_SDIP is 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.

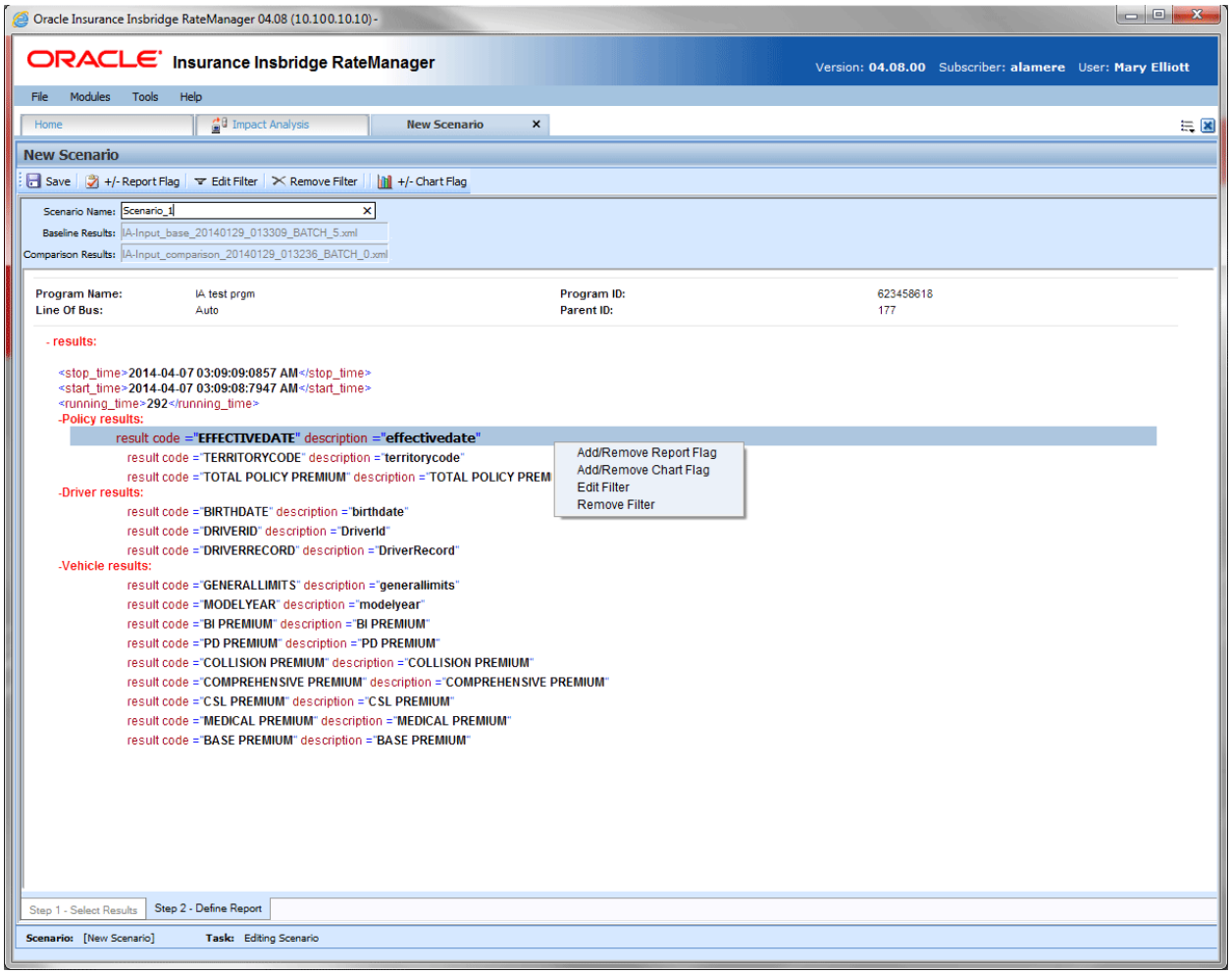



*Figure 53 Flagging or Un-Flagging a Result*

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 ( ) is shown next to the result. If you removed a flag, the check icon is removed.

## Chart Flags

In order for a result to show as a chart value on an Impact Analysis report, it must be flagged with a chart flag. A chart flag can be placed on any flagged result. You must set the report flag first and then set the chart flag. This allows for the result to be displayed in a chart on the report. You can select as many chart flags as you need. Adding a Chart Flag follows the same procedure as adding a Report Flag.

1. Select the flagged result you want displayed in a chart and then click **+/- Chart Flag** or by right clicking it and selecting **Add/Remove Chart Flag** from the menu. A chart flag also can be removed by double-clicking the result. This removes the Report Flag as well.

2. If you added a chart flag, a chart icon ( ) is shown next to the result. If you removed a flag, the chart icon is 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.

### Use of the Filtering option:

- The filter option creates a sub-set of policies that meet the criteria specified in the filter(s).
- If the filter is placed on a sub-category result, any single instance of that category result that tests true will include the policy in the filtered set.
- When filtering on a sub-category, since the filter only controls conditional inclusion of the policy in the filtered set, report and policy detail totals will include both filtered/unfiltered sub-category amounts.
- A policy will be included in the filtered set if all of the filters test true.

Note that Flagging an item causes ALL instances of that item (non-conditional) in a policy to be reported on and totaled for both the filtered set and the non-filtered set (all policies).

### 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.

### 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.

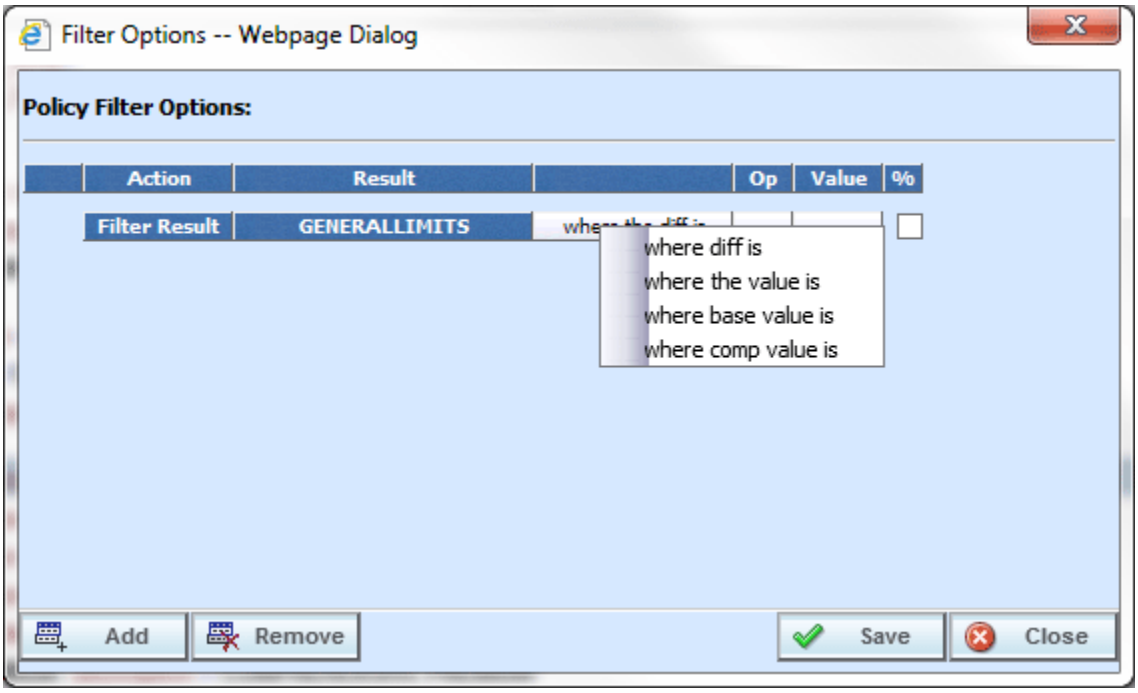



*Figure 54 Policy Filter Options*

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.

6. Select the operator to be used by clicking the -- cell in the **Op** column.

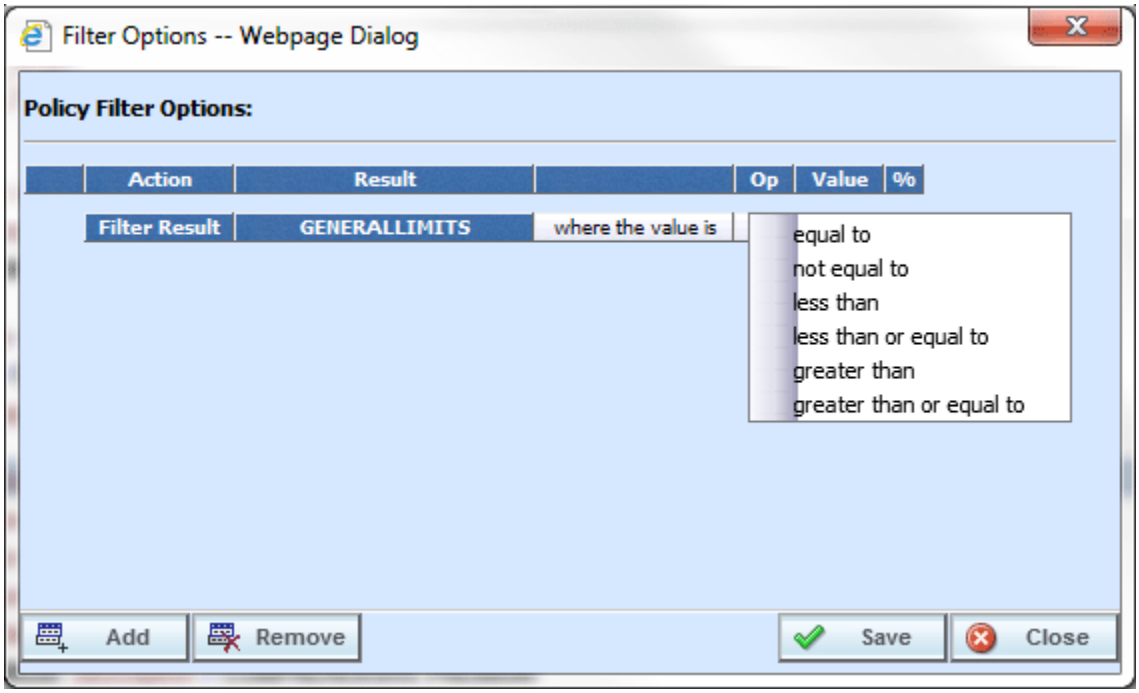



*Figure 55 Filter Options Selecting an Operator*

**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.

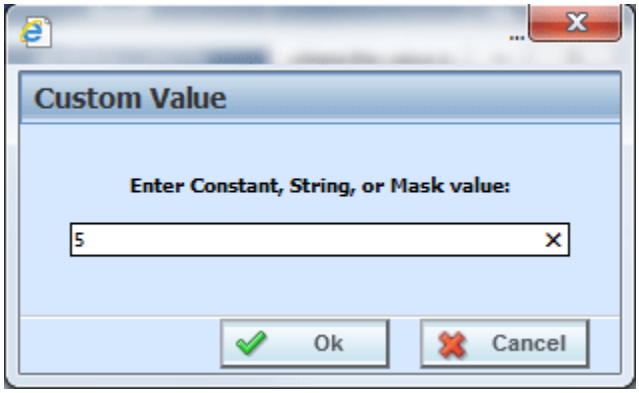



*Figure 56 Entering a Constant Value*

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.

12. If you are finished defining your report, click **Save**.

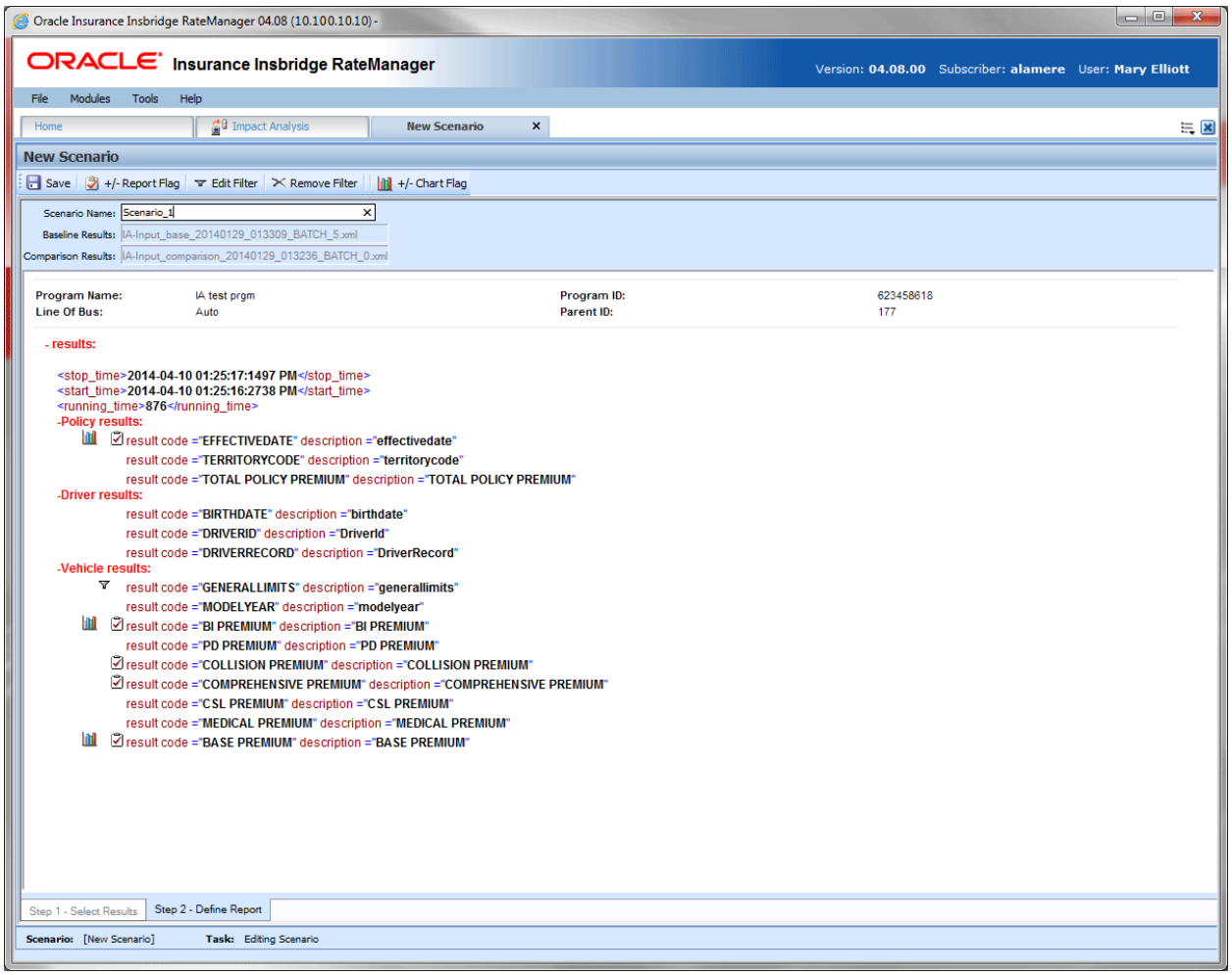



*Figure 57 Step 2: Define Report with Flags and Filters*

# CREATING A NEW SCENARIO REPORT

Once you have finished creating your scenario, you can run it to produce an Impact Analysis report. The report shows 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 opens 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 Send Report Response email address. If you have entered an admin email in IBFA, that email will be used.

7. Click **Run Scenario**. A message will be displayed that your request has been submitted for processing. If a different message is received, see Batch Error Messages.

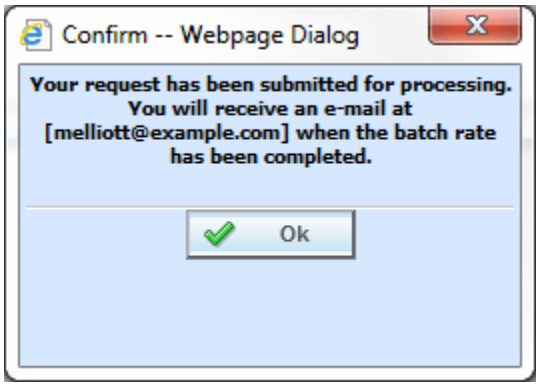



*Figure 58 Confirmation Message for Running an Impact Analysis Scenario*

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.

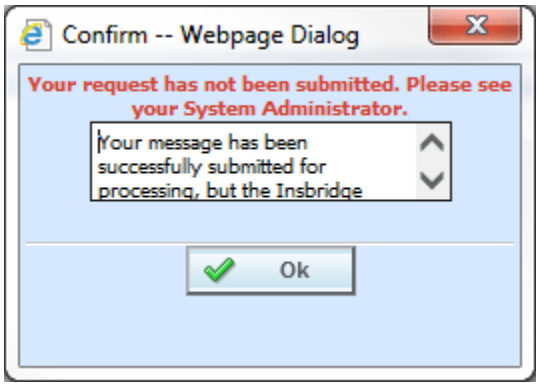



*Figure 59 Error Message for Batch Rate*

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 opens 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.

# RENAMING A SCENARIO REPORT

A scenario report can be re-named after it has been run.

### Renaming a Scenario Report

1. Navigate to the **Reporting** sub-tab. Select the scenario report you want to rename and right click.
2. Select Rename. The Rename screen is displayed.

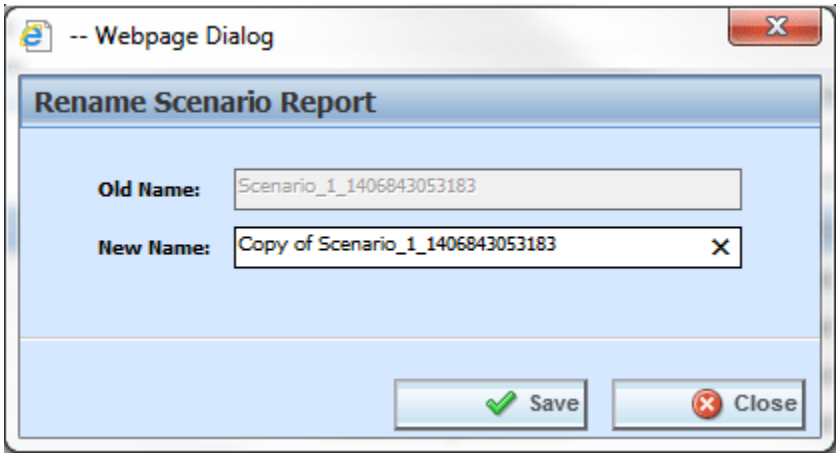



*Figure 60 Renaming a Scenario Report*

3. Enter in the **New Name** and click **Save**. You are returned to the Scenario tab and your report will show the new name. Click Close to return to the Reporting sub-tab without changing the report.

# DELETING A SCENARIO OR SCENARIO REPORT

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 is removed immediately. For scenario reports in the scenario reports listing in the lower part of the tab, you will be asked to confirm deletion.

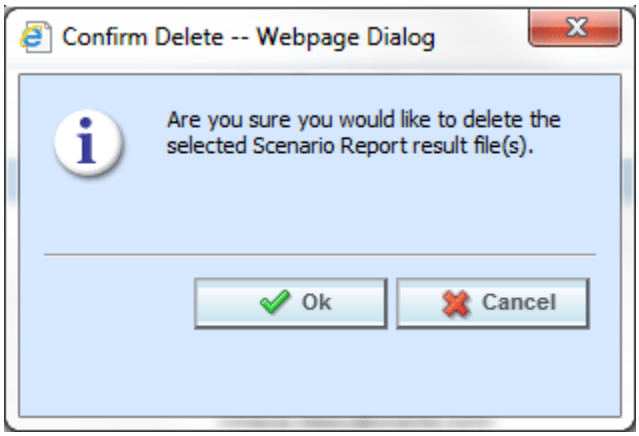



*Figure 61 Delete Report Message*

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:** 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. Multiple files cannot be viewed.
- **View Output:** 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 Reporting. This report shows 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** you want to view and right click. Select **View XML** from the menu. Your report will be displayed in a separate screen. Multiple files cannot be viewed. The View XML report for the Result XML can be selected from the View Output Report.

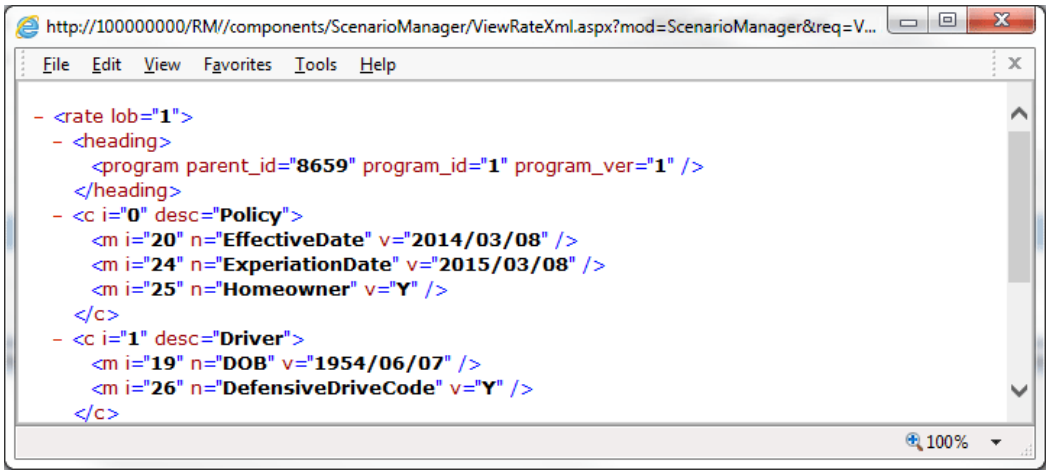



*Figure 62 View XML Report*

# Viewing a View Output Report

Select the **Result XML** you want to view and right click. Select the **View Output** report from the right click menu. Your report is displayed in a separate tab.

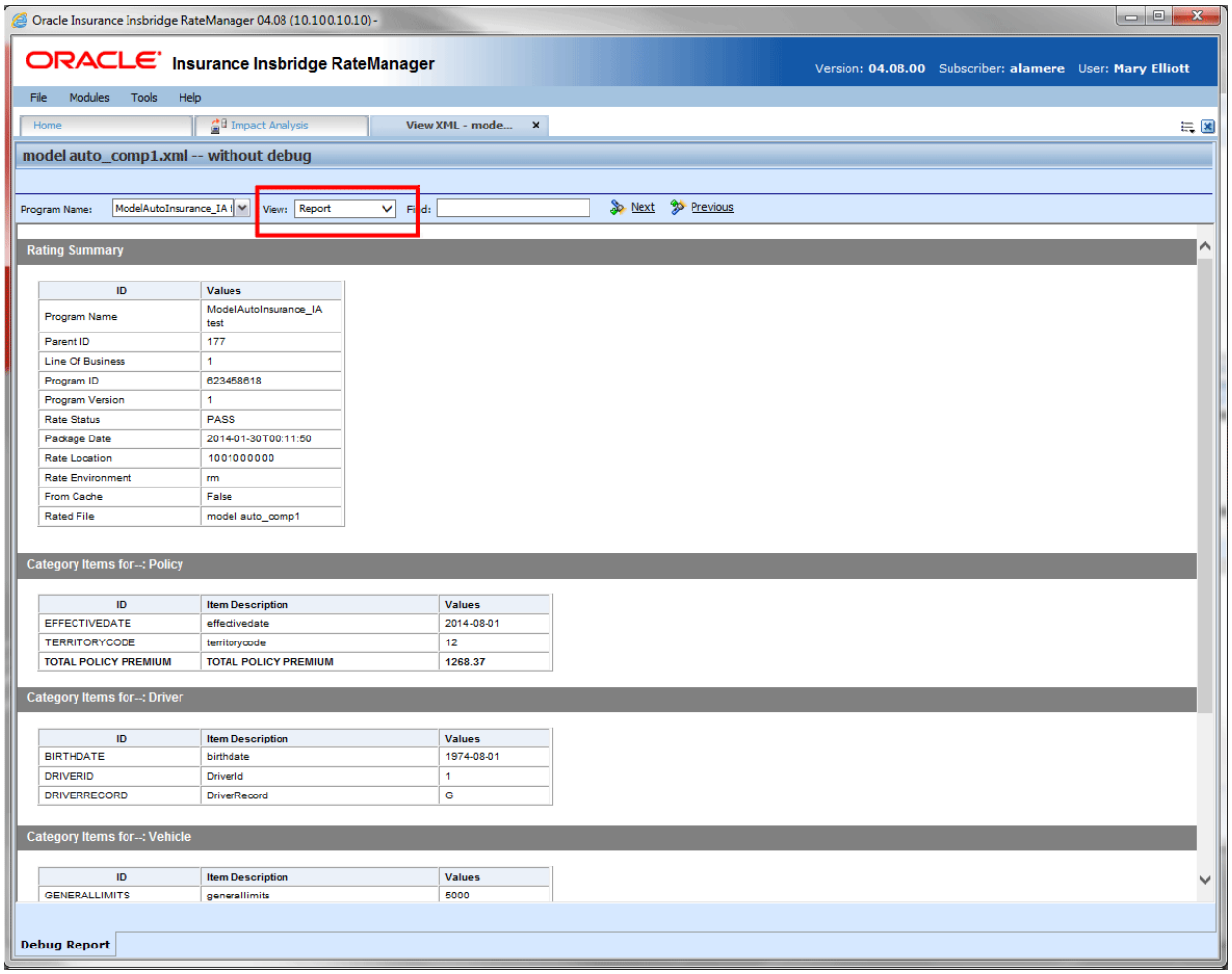



*Figure 63 View Output Report*

The top bar contains the file name and the debug option.

## Navigation Bar

**Program Name:** Displays the name of the program being rated. The drop down menu is available when you are rating multiple programs or when 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 navigates to the next place in the report that a match was found.

**Previous:** If a search is performed, Find Previous navigates to the previous place in the report that a match was found.

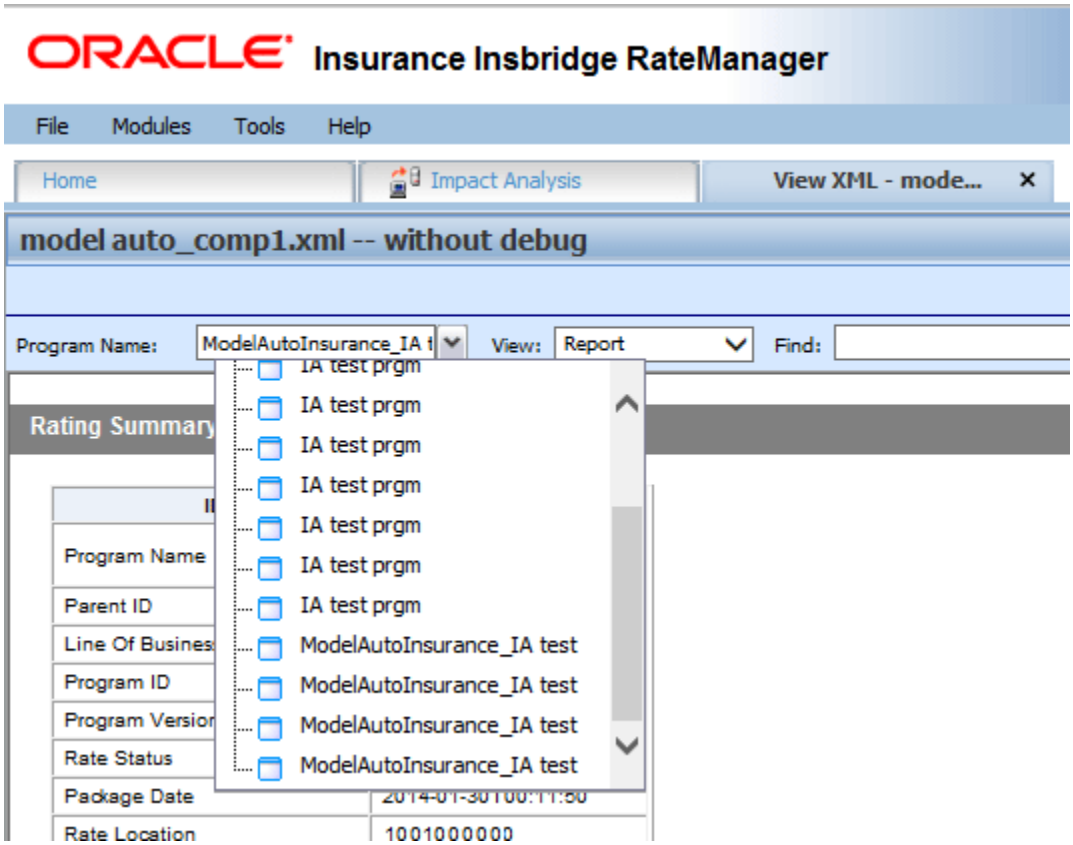



*Figure 64 Output XML with Multiple Files*

Click the drop down to see if multiple files are available. You can select to view another file.

### Advanced Options

Advanced Algorithm Looping is 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 are not displayed.

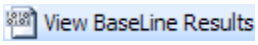
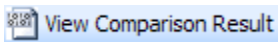
# VIEWING BASELINE AND COMPARISON FILES

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 65 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 Scenario Report

1. Navigate to Impact Analysis→Reporting sub-tab. Scenario Reports are 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 opens in a separate window.

Scenario reports have two tabs at the top of the screen:

- **Summary:** Contains charts, if requested, and a summary of results.
- **Details:** Contains the details of the programs contained in the report. If more than one program has been used, you can select the program from a list.

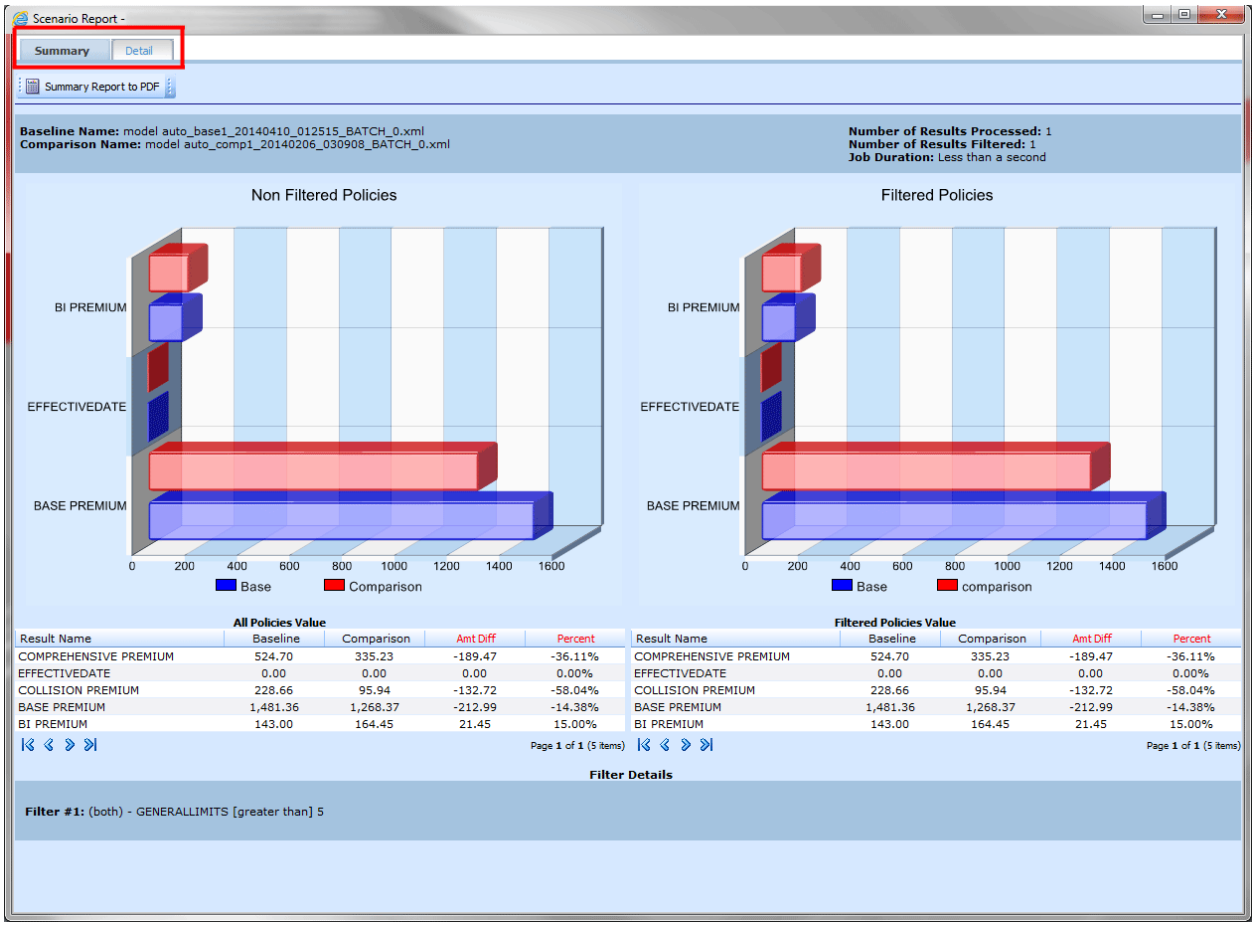
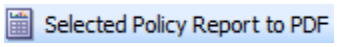



*Figure 66 Impact Analysis Scenario Report with Chart*

Scenario reports have one button:

| | |
|---|---|
|  | **Selected Policy Report to PDF:** Prints a PDF report of the selected policy. If the button is grayed out, there are no policies to select. |

## Summary/Chart View

If you have placed chart flags on any results, a chart is displayed on the summary page. If no chart information has been requested, only a summary report is presented. If filters have been placed on the results, charts will be presented for non-filtered policies and for filtered policies.

Scenario summary information is located at the top of the report, above the chart if present. Statistics on the results is in the middle of the report, or below the chart. At the bottom is filter details.

### Scenario Summary

The top portion of each report contains the basic information used to create the report.

**Baseline Name:** Name of the baseline file selected.

**Comparison Name:** Name of the comparison file selected.

**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

The middle area displays all results that have been flagged, as well as statistical information about the result.

#### All Policy Values

- **Result Name:** The name of the result the information is for.
- **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**.

#### Filtered Policies Values

- **Result Name:** The name of the result the information is for.
- **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**.

### Filter Details

A listing of all filters used for the current report.

## Detail Report

The Detail report tab contains the details for the policies used to create the report.

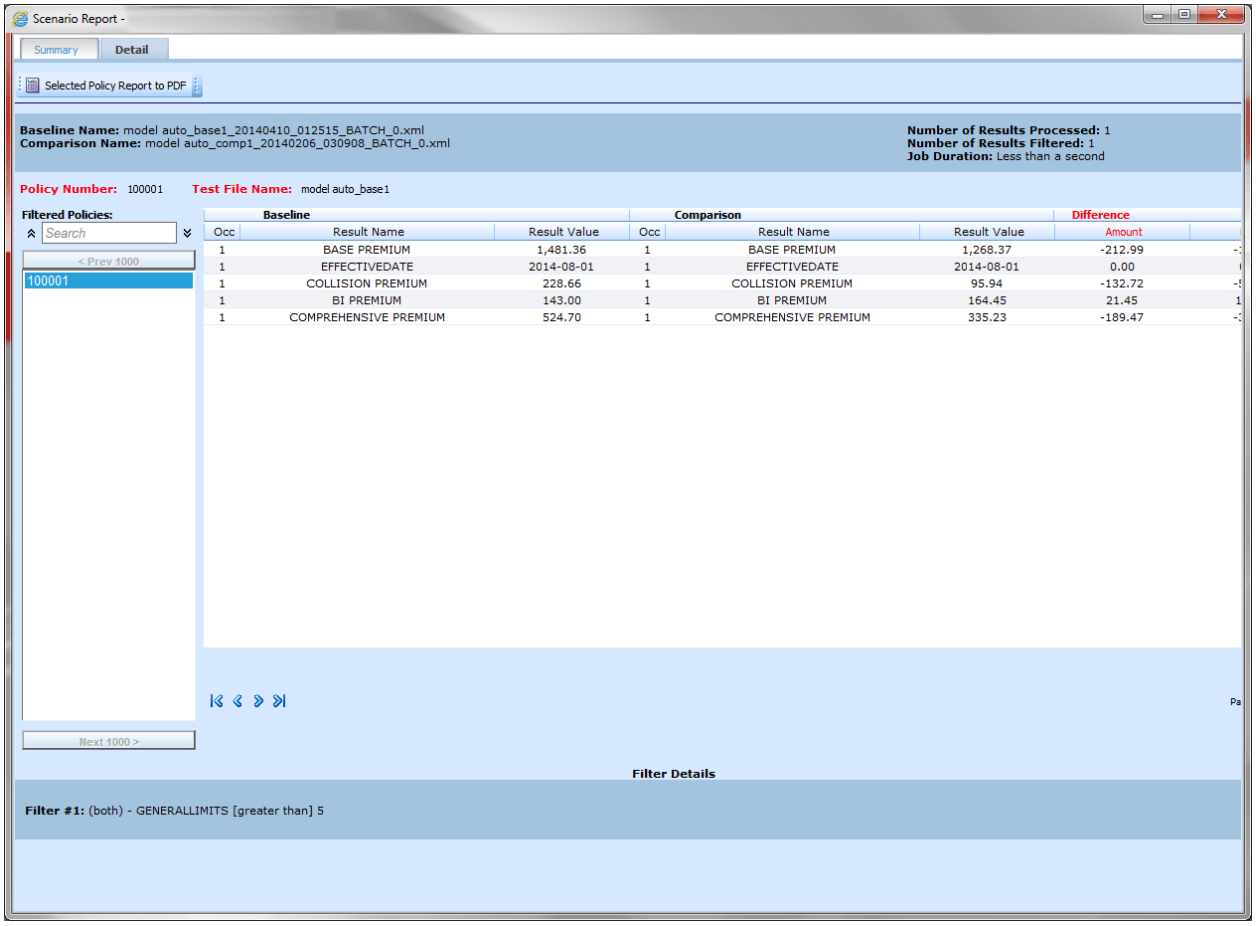



*Figure 67 Scenario Report Details*

## 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.
- **Occ:** The number of occurrences.
- **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.
- **Occ:** The number of occurrences.
- **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.

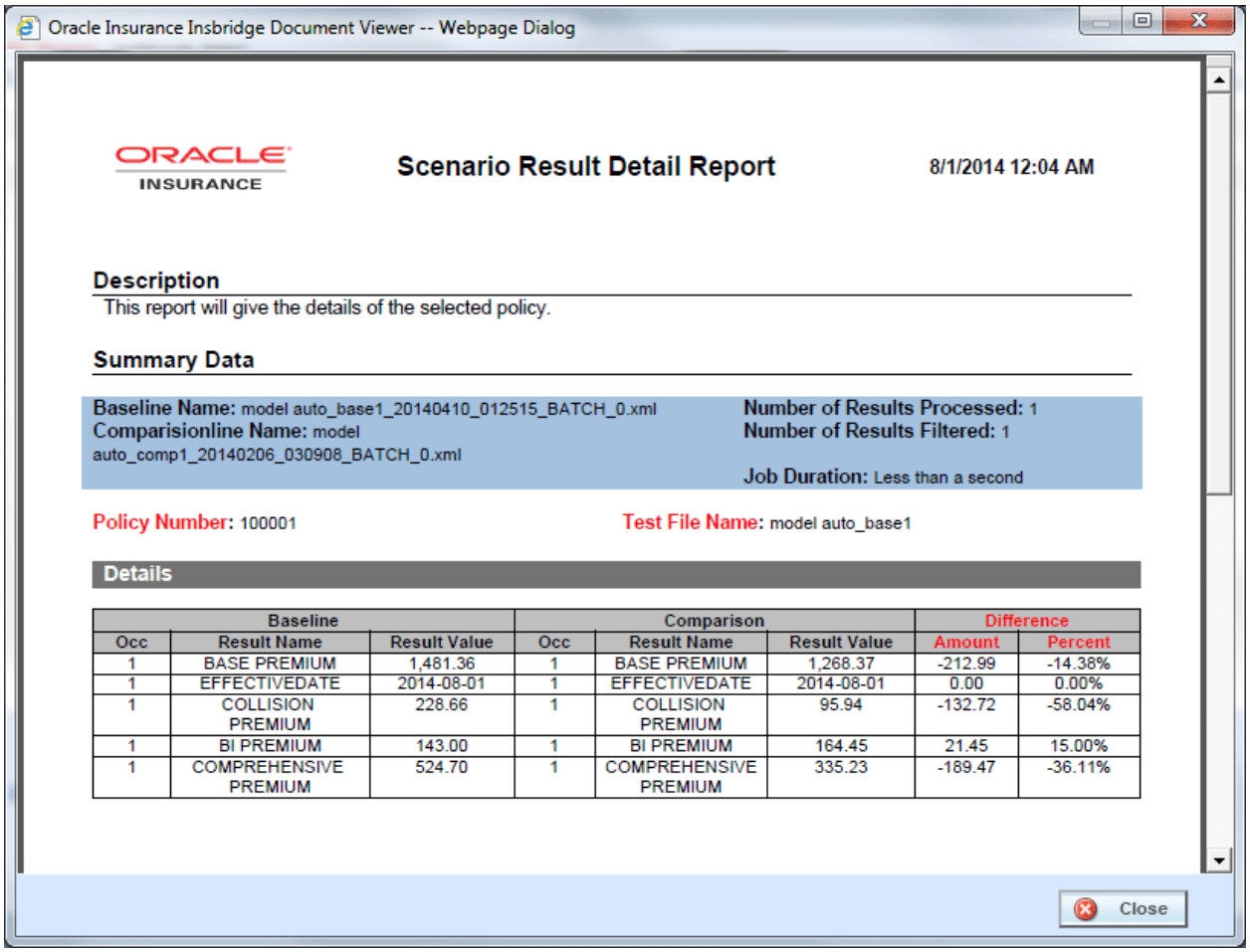
**Difference**

- **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**.
- **Percent:** 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**.

### Selected Policy Report to PDF

The top of the report contains a Selected Policy Report to PDF button. This report provides details on the selected policy.

**NOTE:** *PDF viewing software such as Acrobat Reader® is required to view PDF files.*




| Baseline | | | Comparison | | | Difference | |
|---|---|---|---|---|---|---|---|
| Occ | Result Name | Result Value | Occ | Result Name | Result Value | Amount | Percent |
| 1 | BASE PREMIUM | 1,481.36 | 1 | BASE PREMIUM | 1,268.37 | -212.99 | -14.38% |
| 1 | EFFECTIVEDATE | 2014-08-01 | 1 | EFFECTIVEDATE | 2014-08-01 | 0.00 | 0.00% |
| 1 | COLLISION PREMIUM | 228.66 | 1 | COLLISION PREMIUM | 95.94 | -132.72 | -58.04% |
| 1 | BI PREMIUM | 143.00 | 1 | BI PREMIUM | 164.45 | 21.45 | 15.00% |
| 1 | COMPREHENSIVE PREMIUM | 524.70 | 1 | COMPREHENSIVE PREMIUM | 335.23 | -189.47 | -36.11% |

*Figure 68 Policy to PDF Report*

### To View a PDF

1. On the Scenario Report, select the program that you want in PDF form.
2. Click the Selected Policy to PDF button.
3. The PDF opens in a separate window. You can Print or Save to your local machine or network if needed.

### Viewing Options

There are buttons located on the lower portion of the window that allow you to view and download report files, and close the window when you place your cursor over the lower portion of the screen.

## Exporting a Report

You can export reports on the Reporting sub-tab in MS Excel format. These reports are open for editing and can be stored to a local drive or share. The information contained in a exported report in the same as in the summary statistics section of the Scenario Summary report.

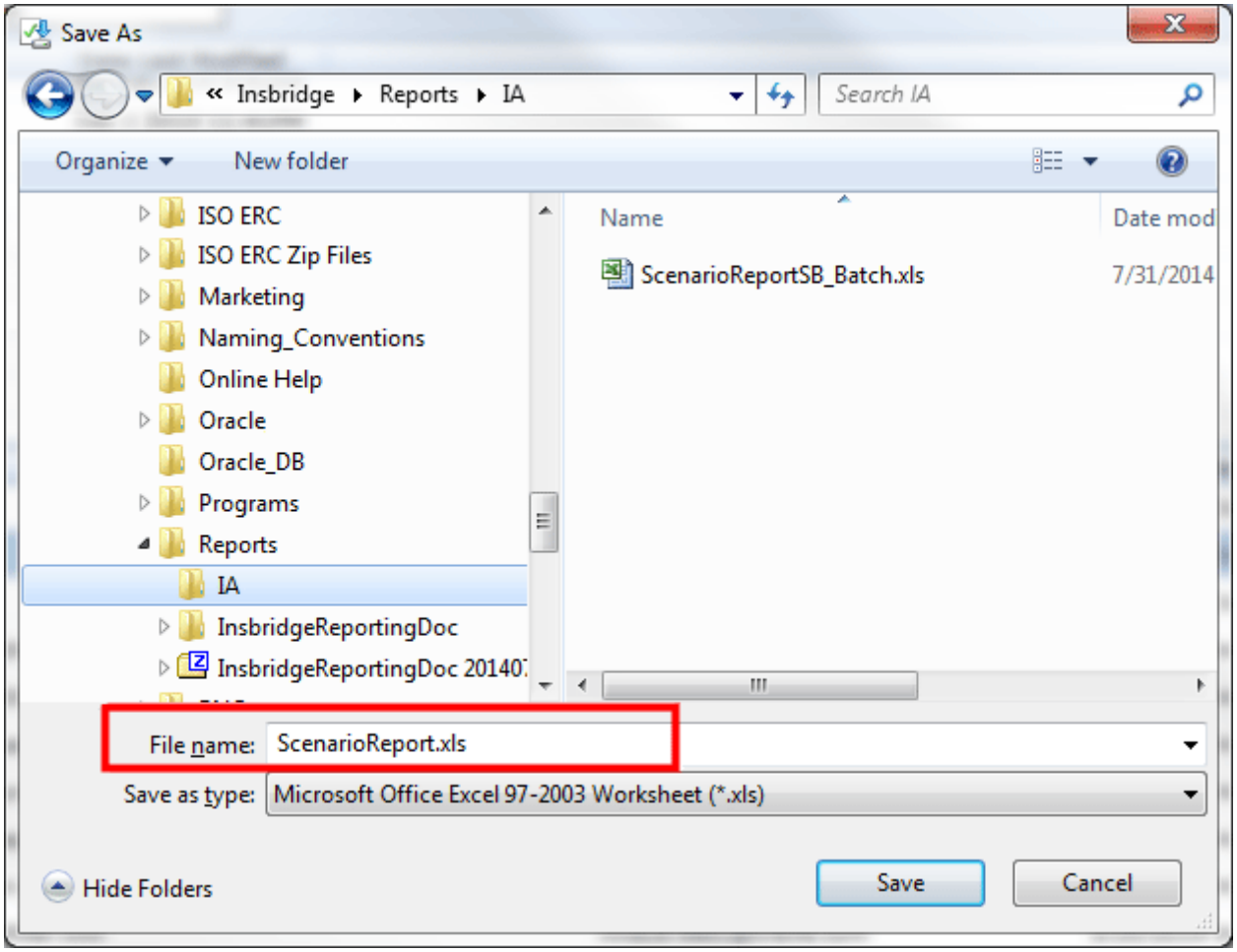



*Figure 69 Exporting a Report*

**NOTE:** *When you do a "Save As" from the export, you should rename the file. By default, when you go to save, all export files are named "ScenarioReport". It is recommended that you rename the file.*

1. Navigate the Impact Analysis->Reporting sub-tab and select the report you want in MS Excel format.

2. Click the Export button in the menu.

3. Your computer's dialogue screen is displayed.

4. Enter in a new name and Save or Save As and select the drive or share where you want to save your report.

# 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.

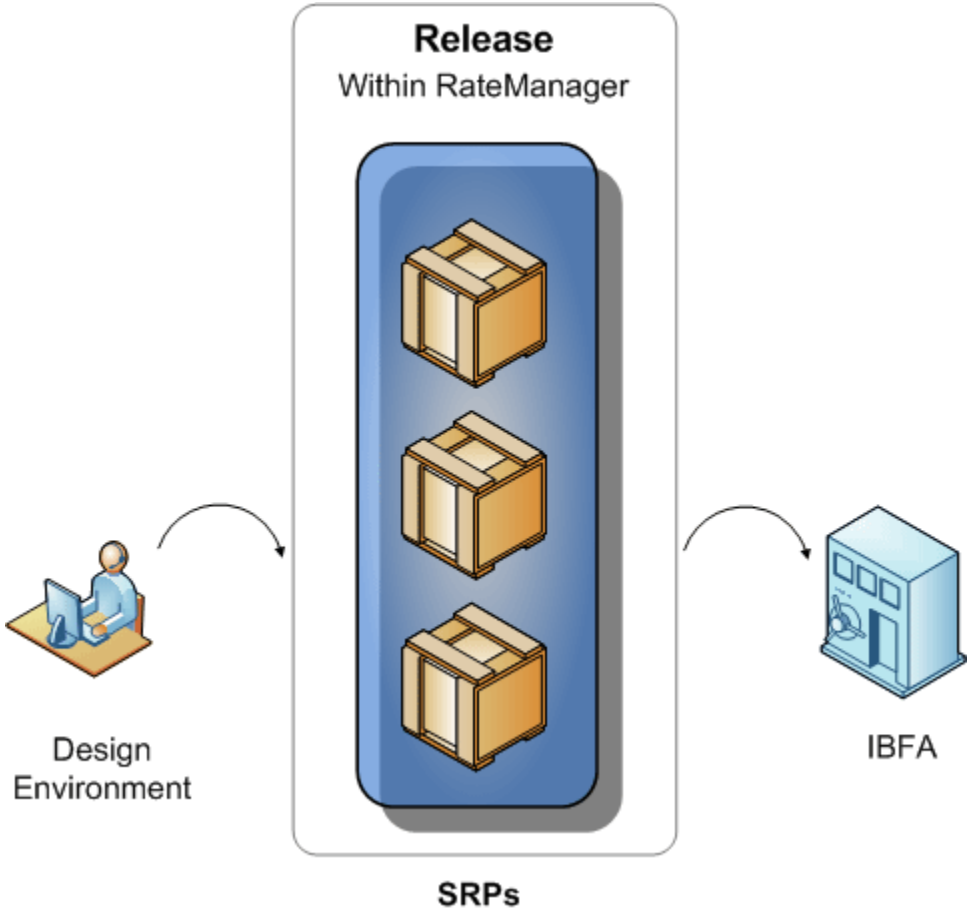



*Figure 70 Release Process*

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.

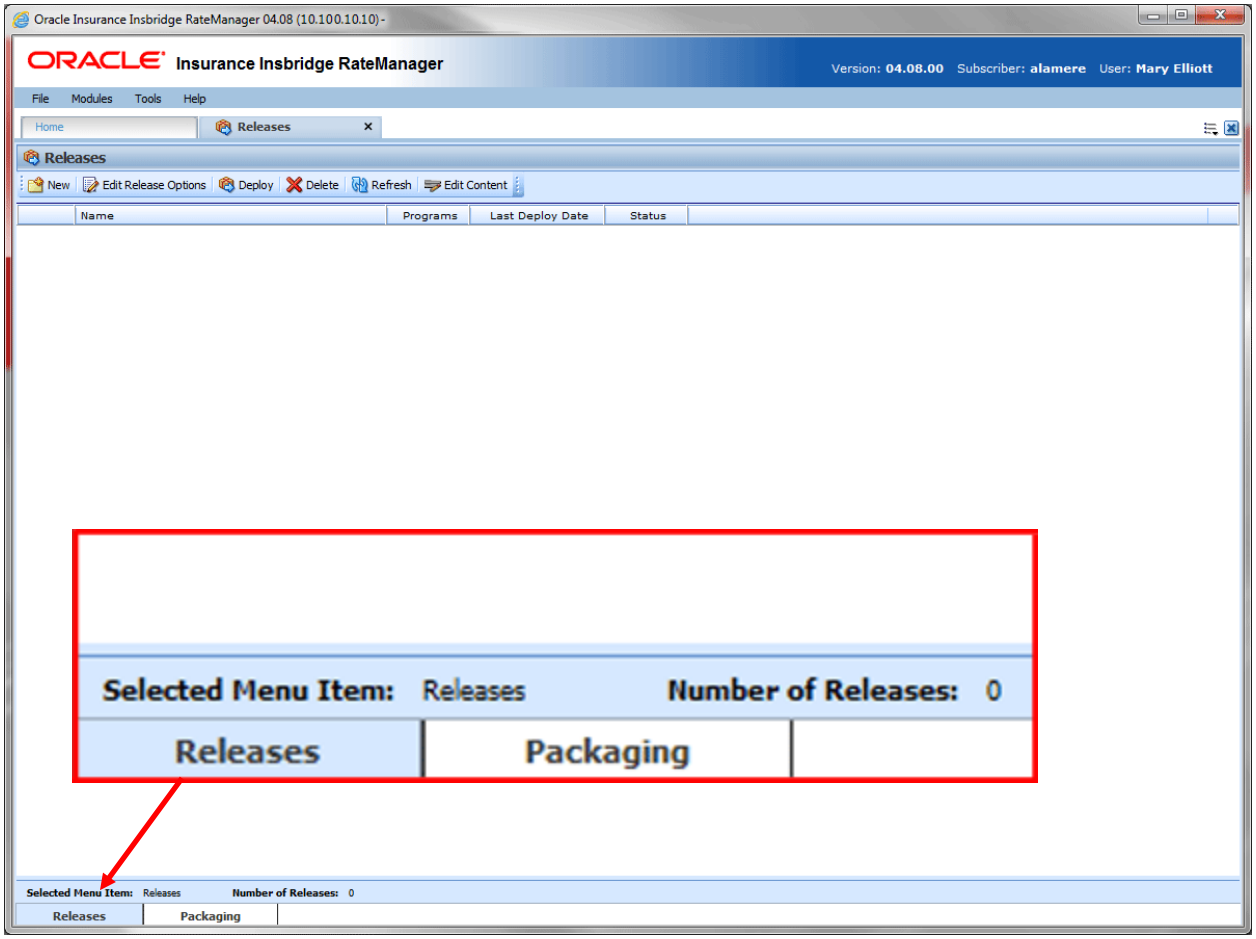
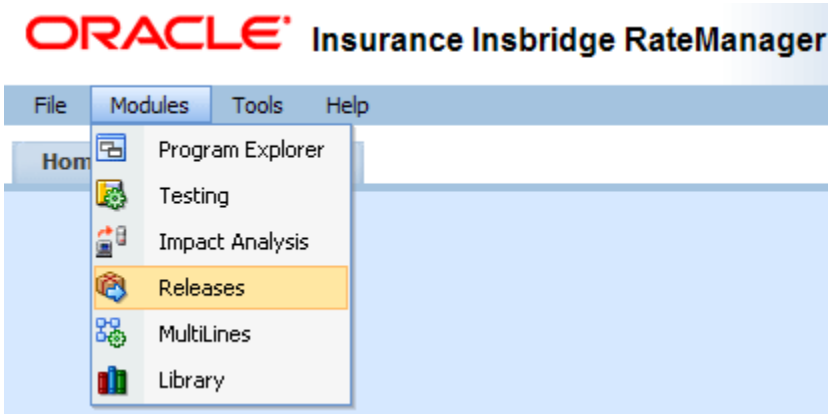



*Figure 71 Releases Screen*

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

### To Navigate to Releases

1. Select Modules→**Releases**.




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

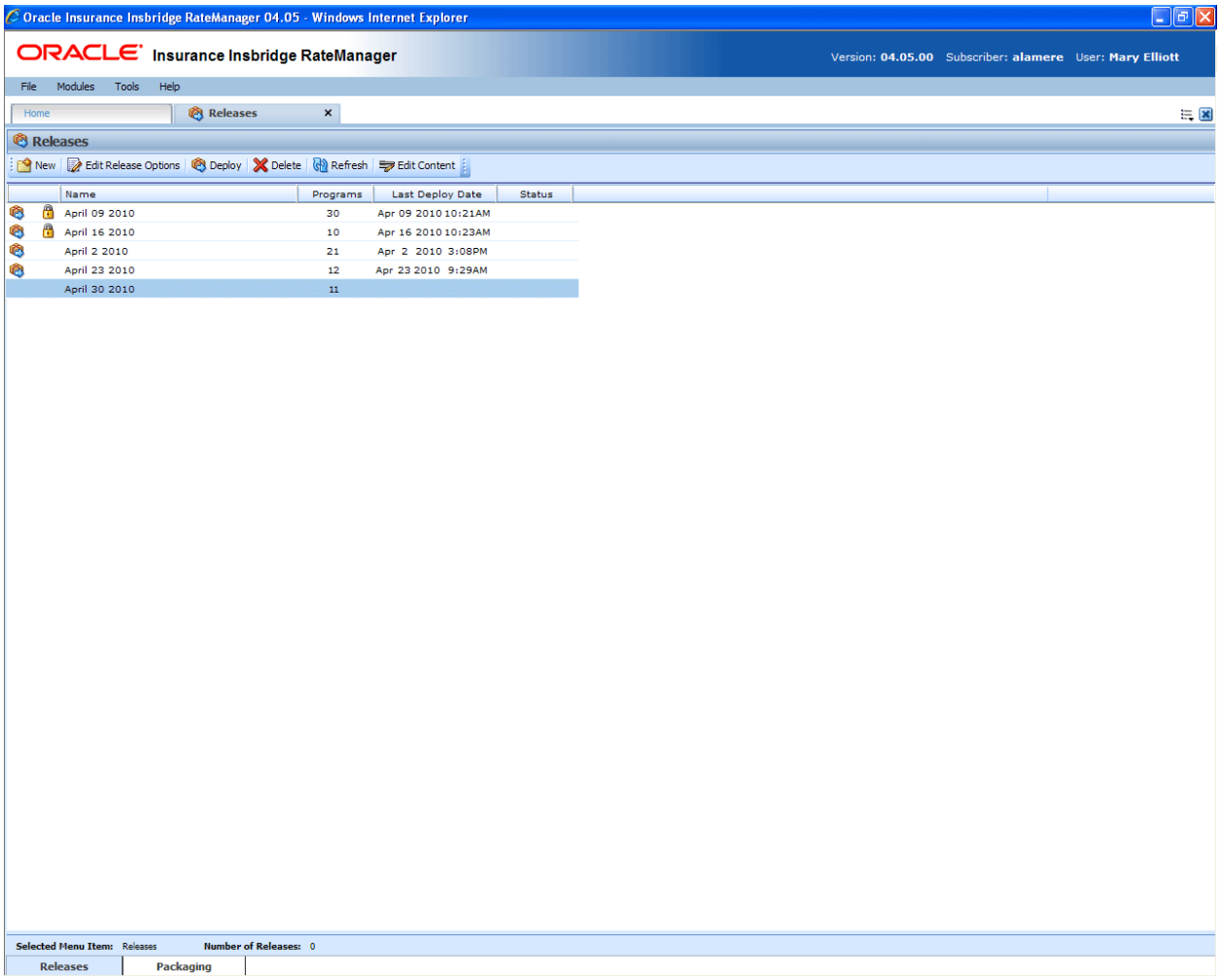



*Figure 72 Releases Screen*

**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*

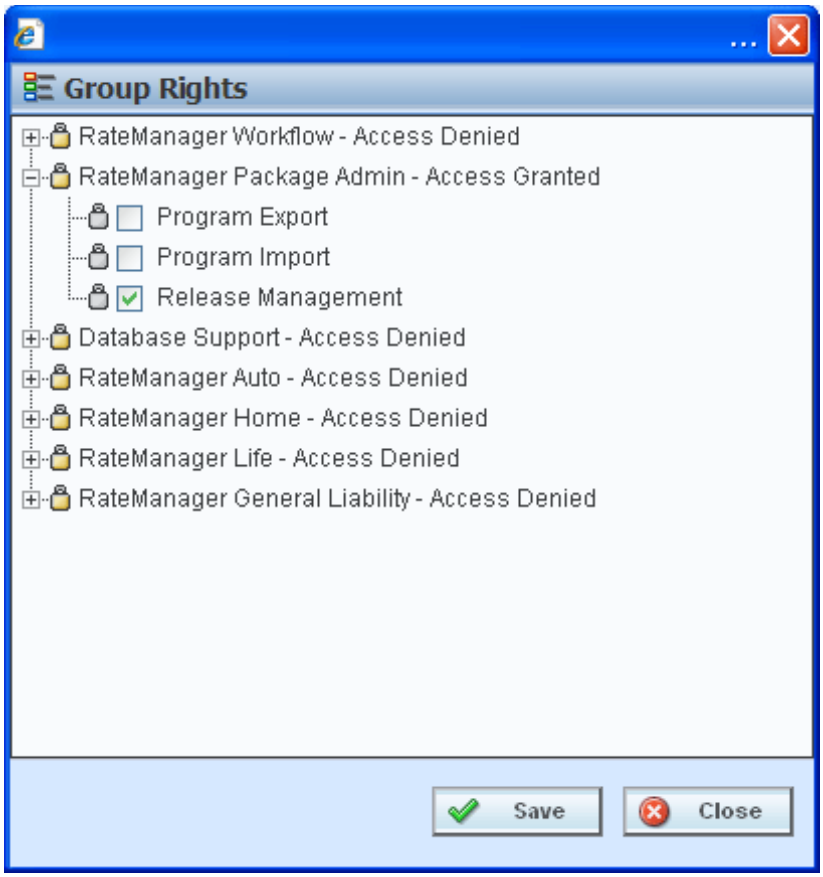



*Figure 73 Release Manager Rights*

Only users who belong to an Administrator group 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 has the ability to deploy the rates directly to SoftRater without manually loading the packages through IBFA.

From this sub-tab, authorized users can:

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

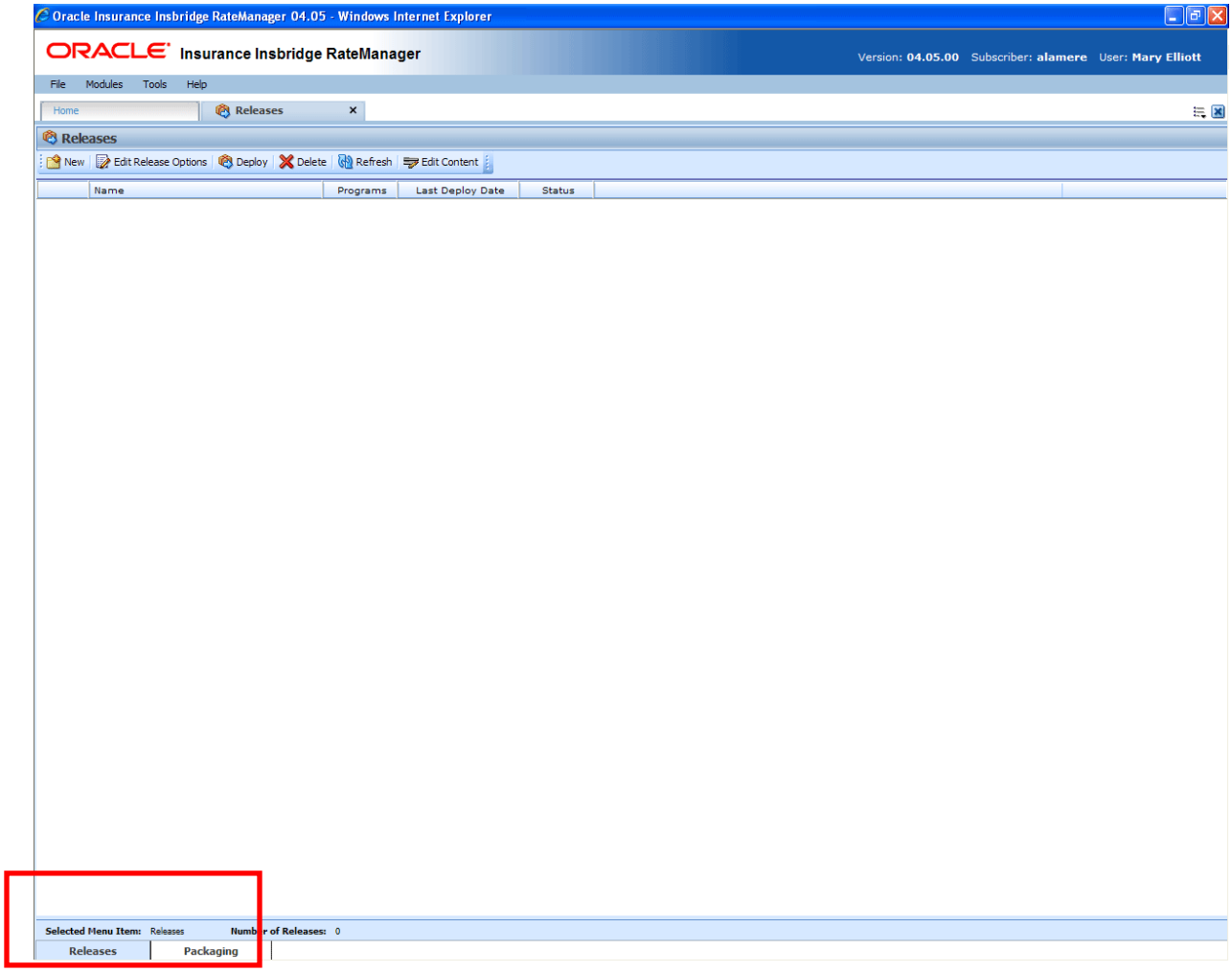
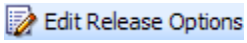
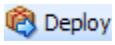
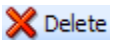
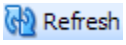
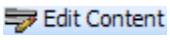



*Figure 74 Releases Sub-Tab*

# 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.<br><br>**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 has a right click menu. Menu options 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.

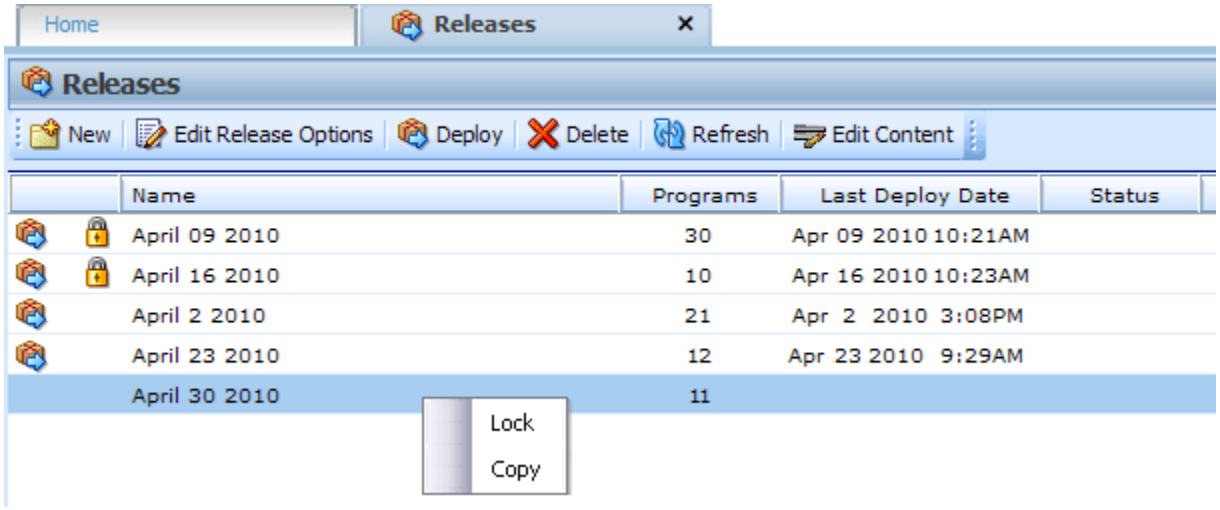



*Figure 75 Right Click Menu for the Releases Listing*

**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 opens the **New Release** window.

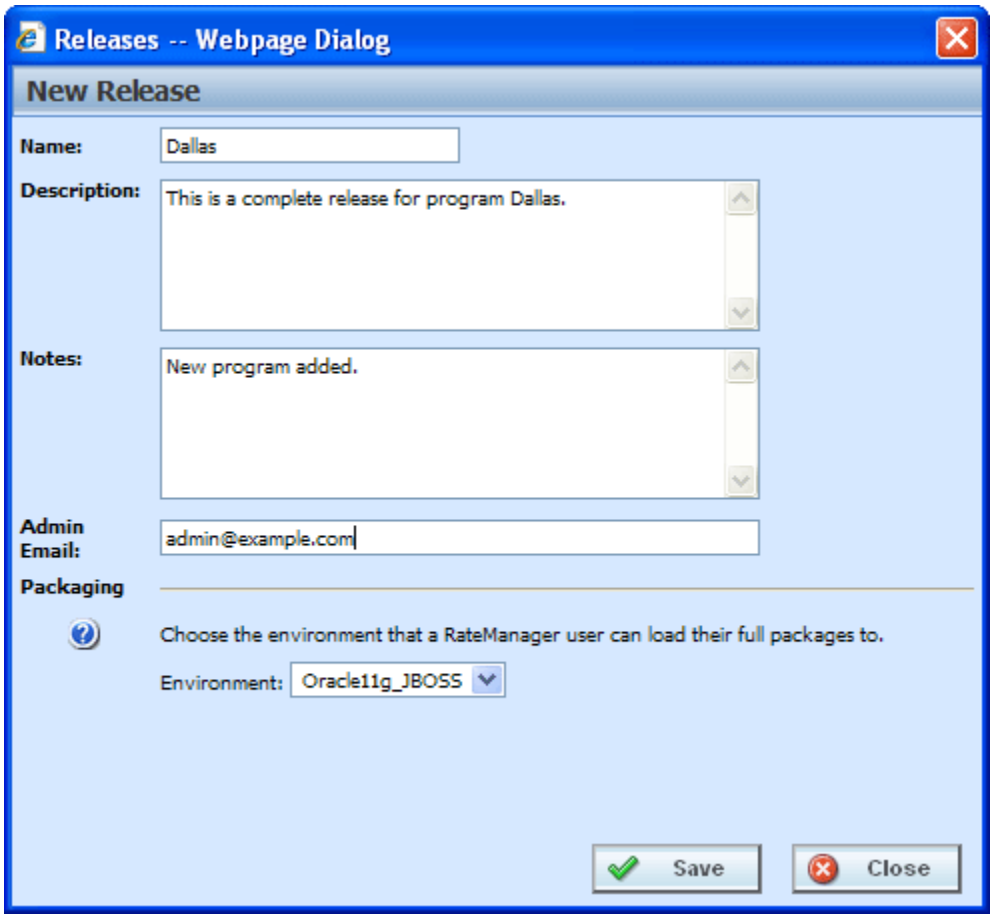



*Figure 76 Creating New Release*

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.

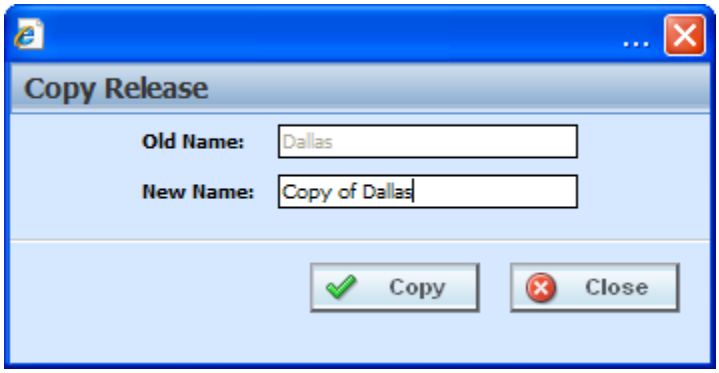



*Figure 77 Copy Release*

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 opens the **Deploy Release** window.

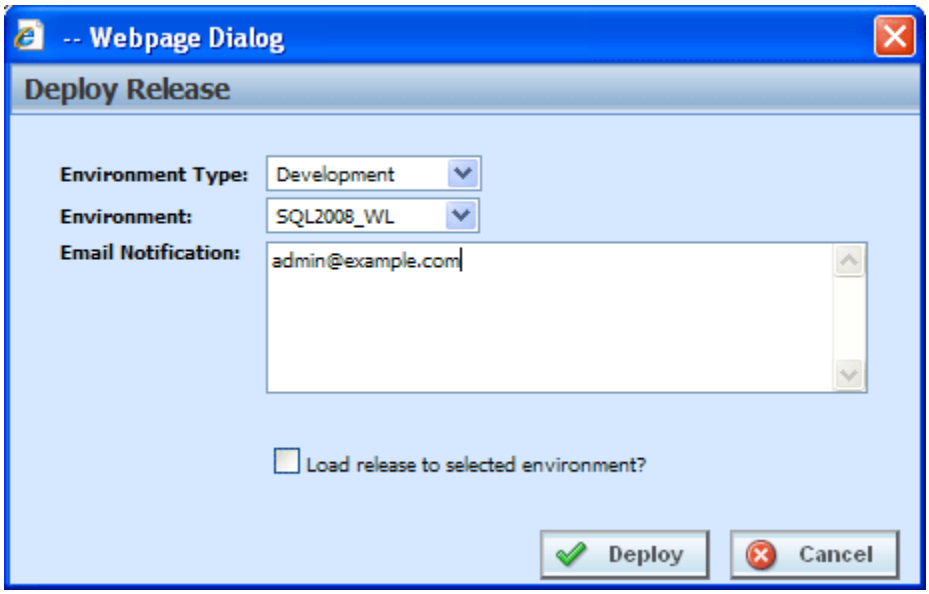



*Figure 78 Deploying a Release*

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.

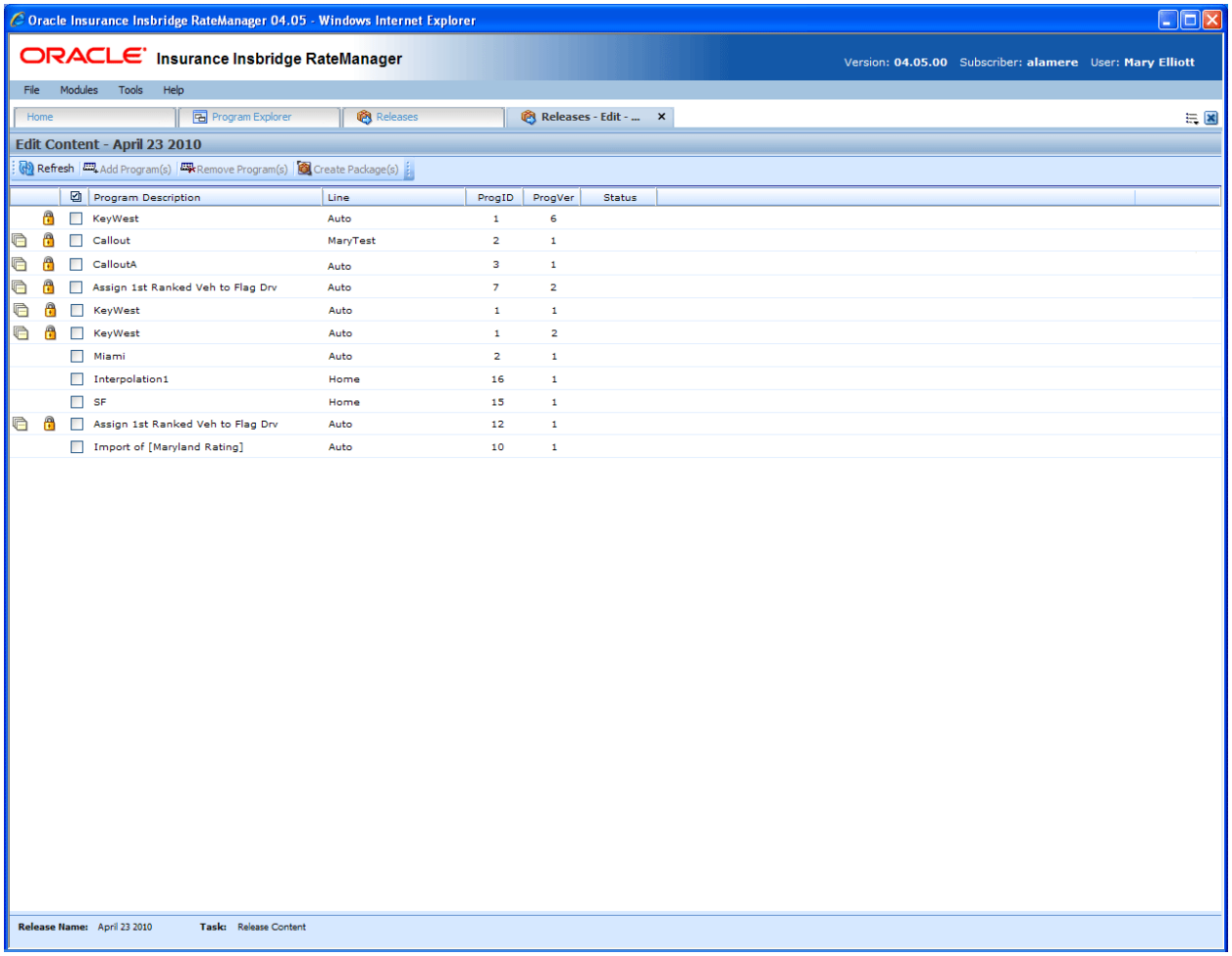
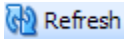
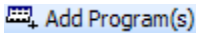
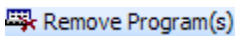
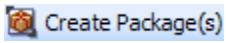



*Figure 79 Edit Content for a Release*

# 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.<br><br>**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.

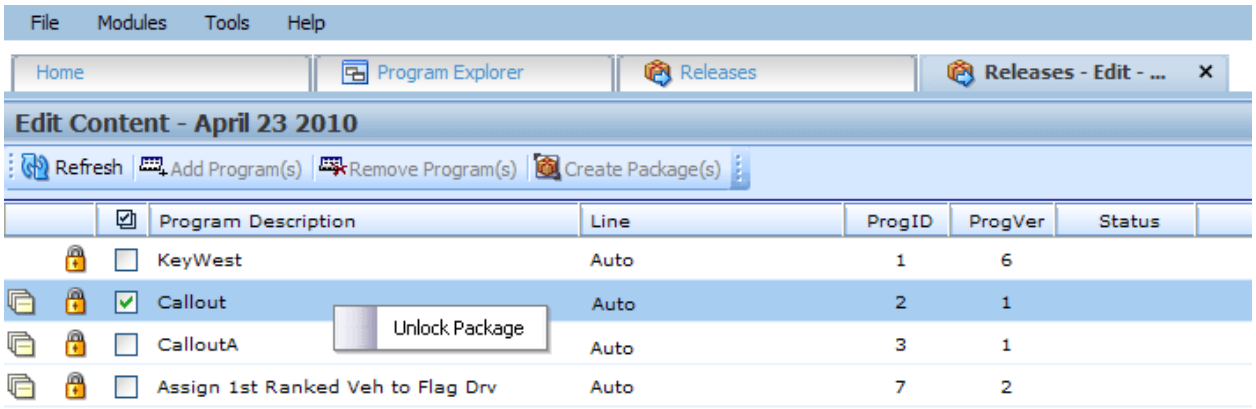



*Figure 80 Right Click Menu for the Edit Content Listing*

**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 created 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.

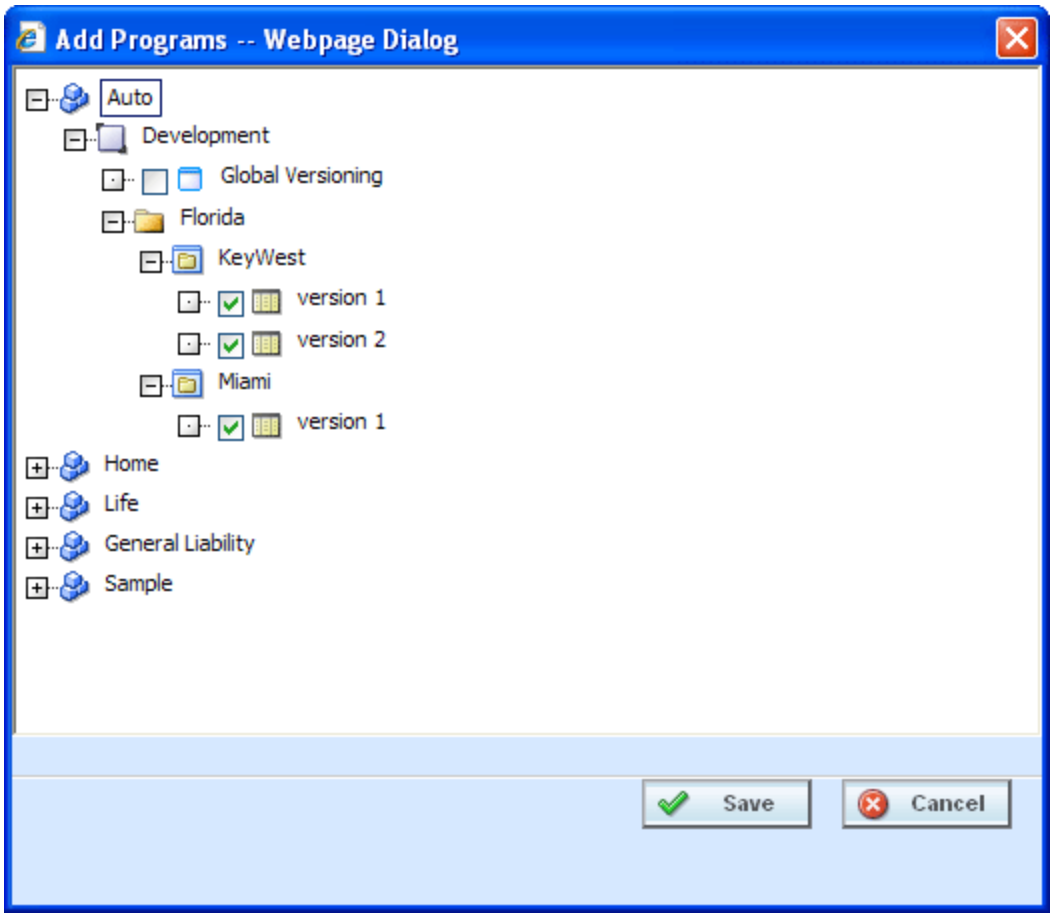



*Figure 81 Selecting Versions to Add to a Program*

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.

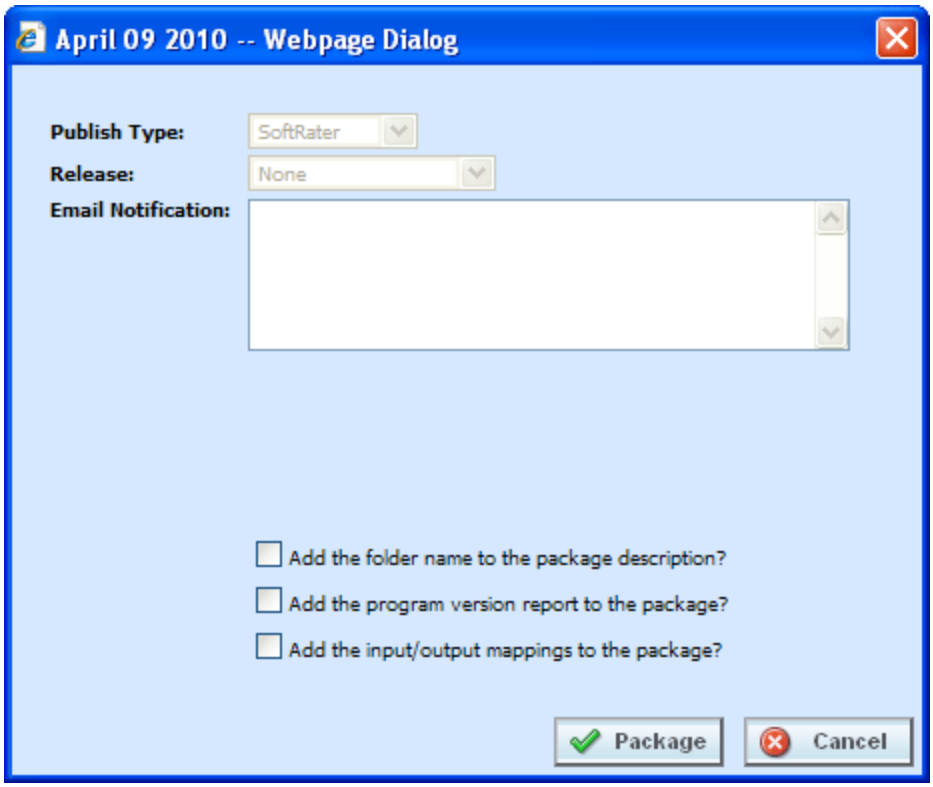



*Figure 82 Packaging Programs for a Release*

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

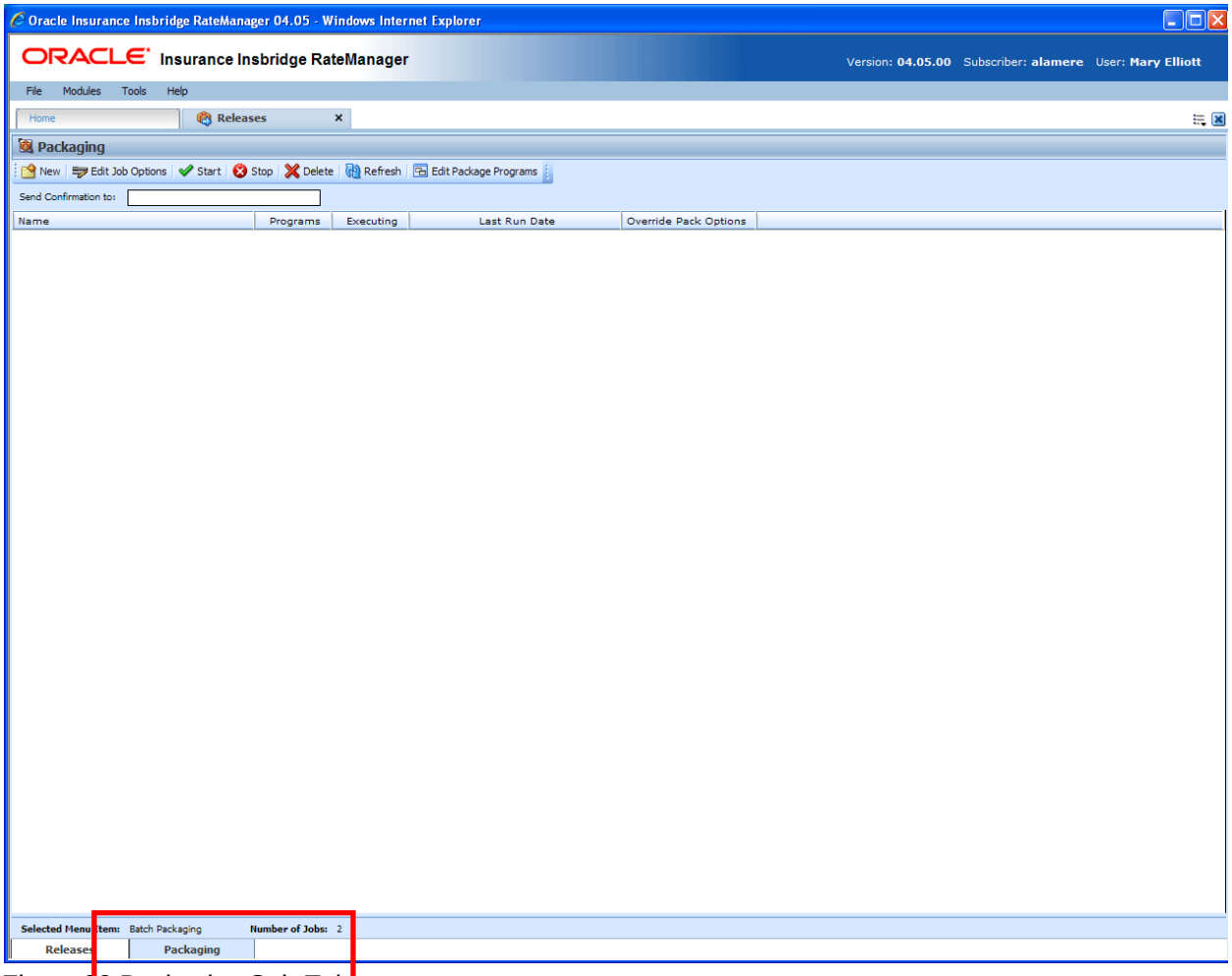
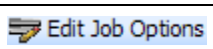
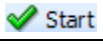
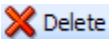
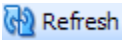
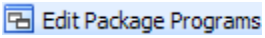



*Figure 83 Packaging Sub-Tab*

# 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.

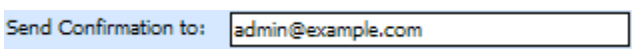
**Executing:** A checkmark indicates this packaging job is currently running. No checkmark indicates the packaging job is finished.

**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.<br>**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.

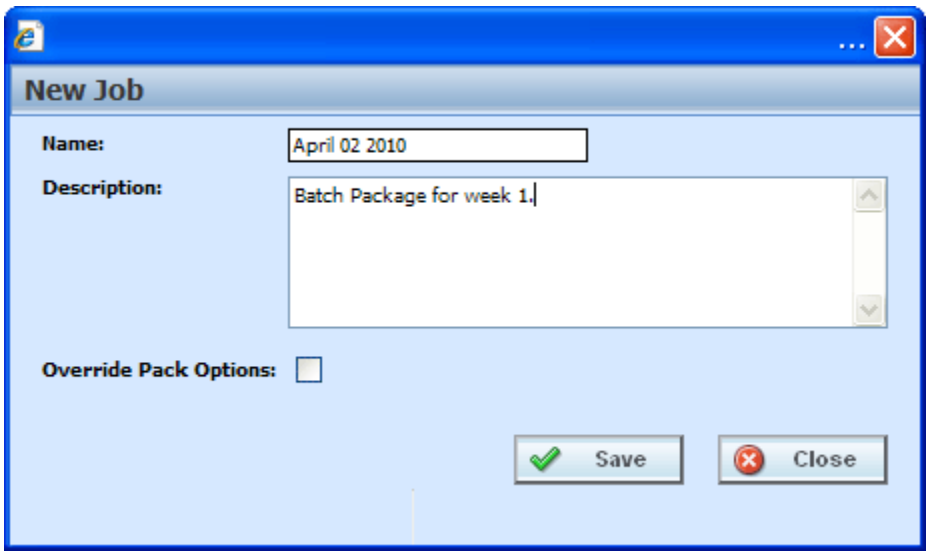



*Figure 84 Creating New Job*

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.

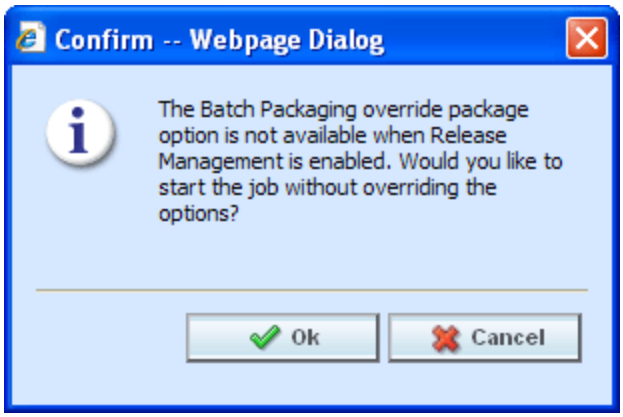



*Figure 85 Override Batch Package Options Error*

**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.*

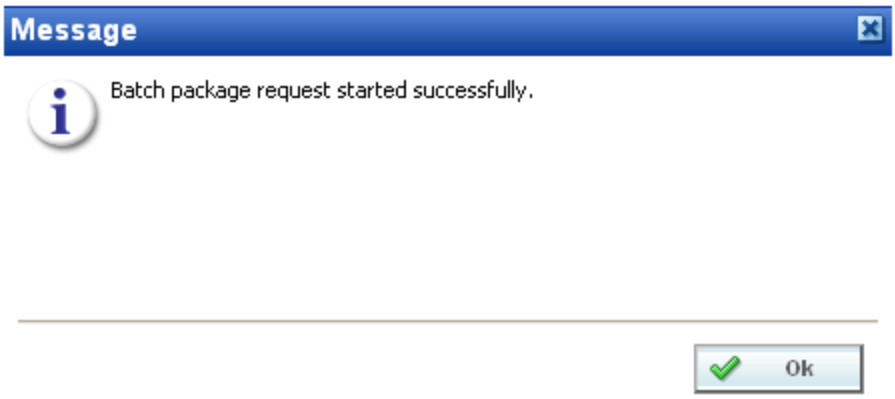



*Figure 86 Starting a Batch*

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**.

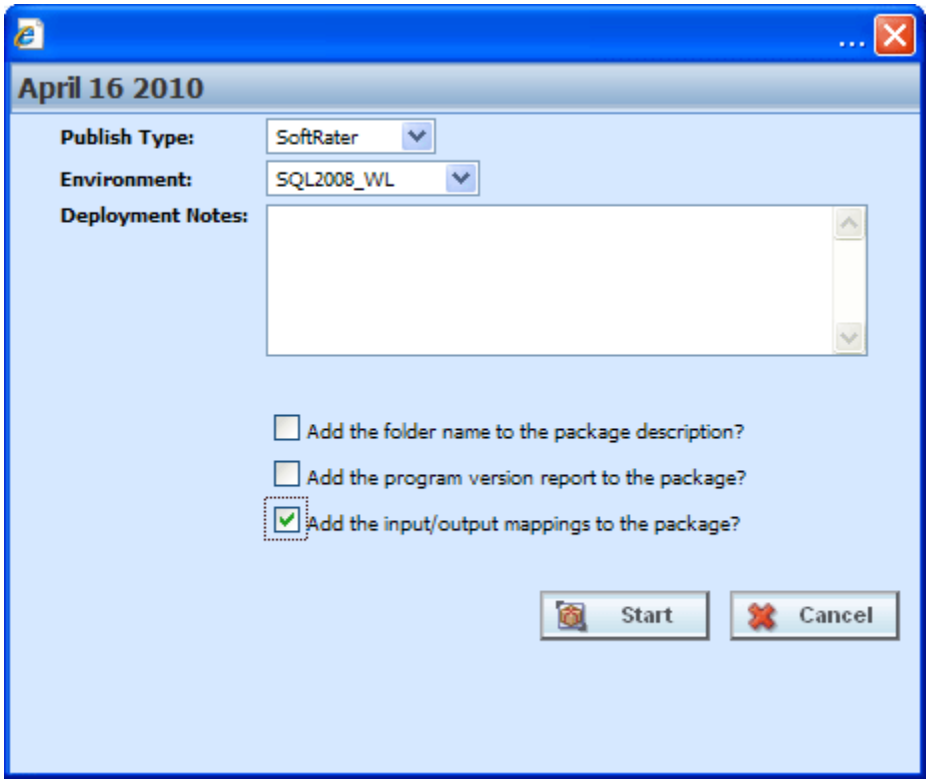



*Figure 87 Editing Program Packaging Options Allowing for Override*

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**.

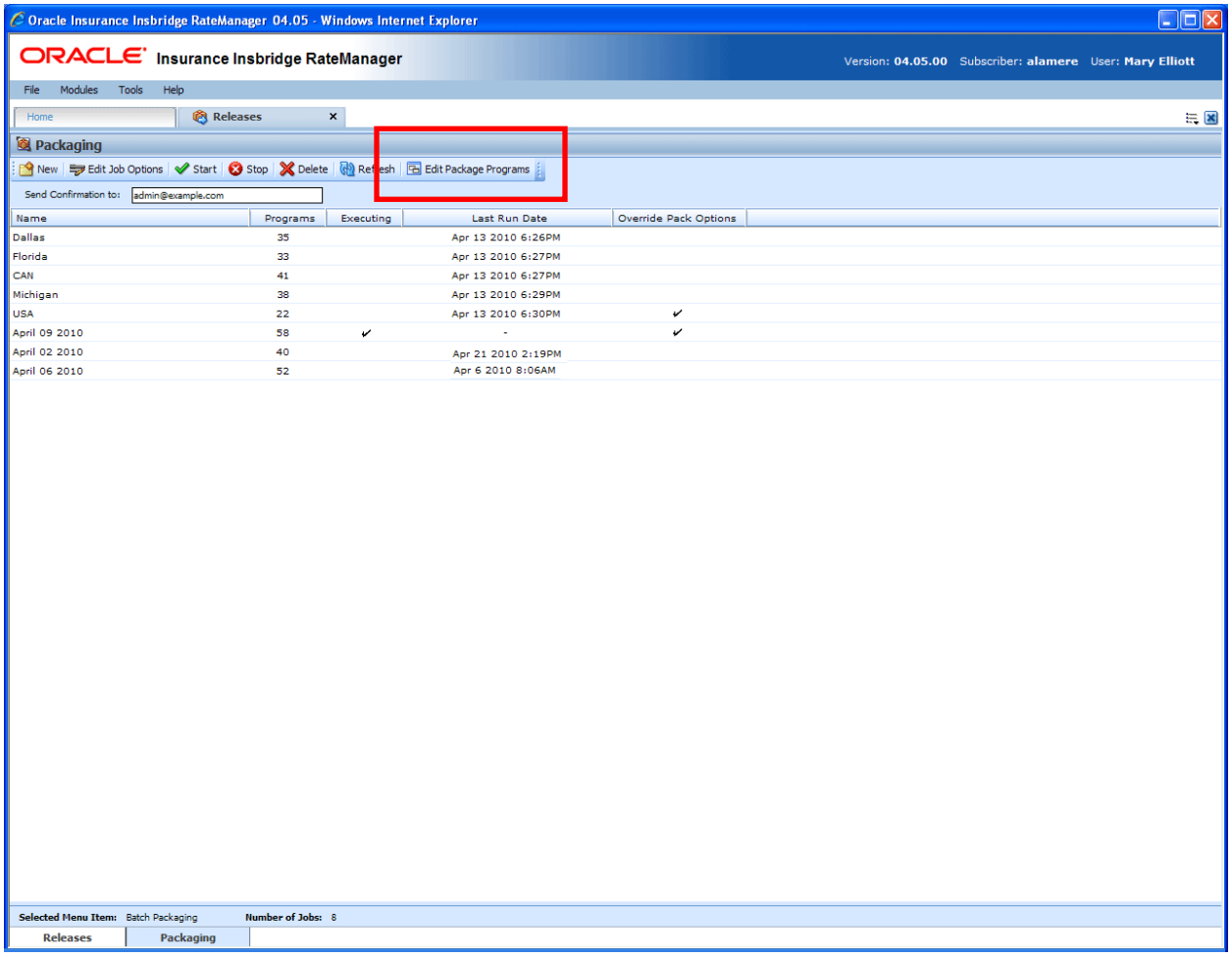



*Figure 88 Programs Tab*

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

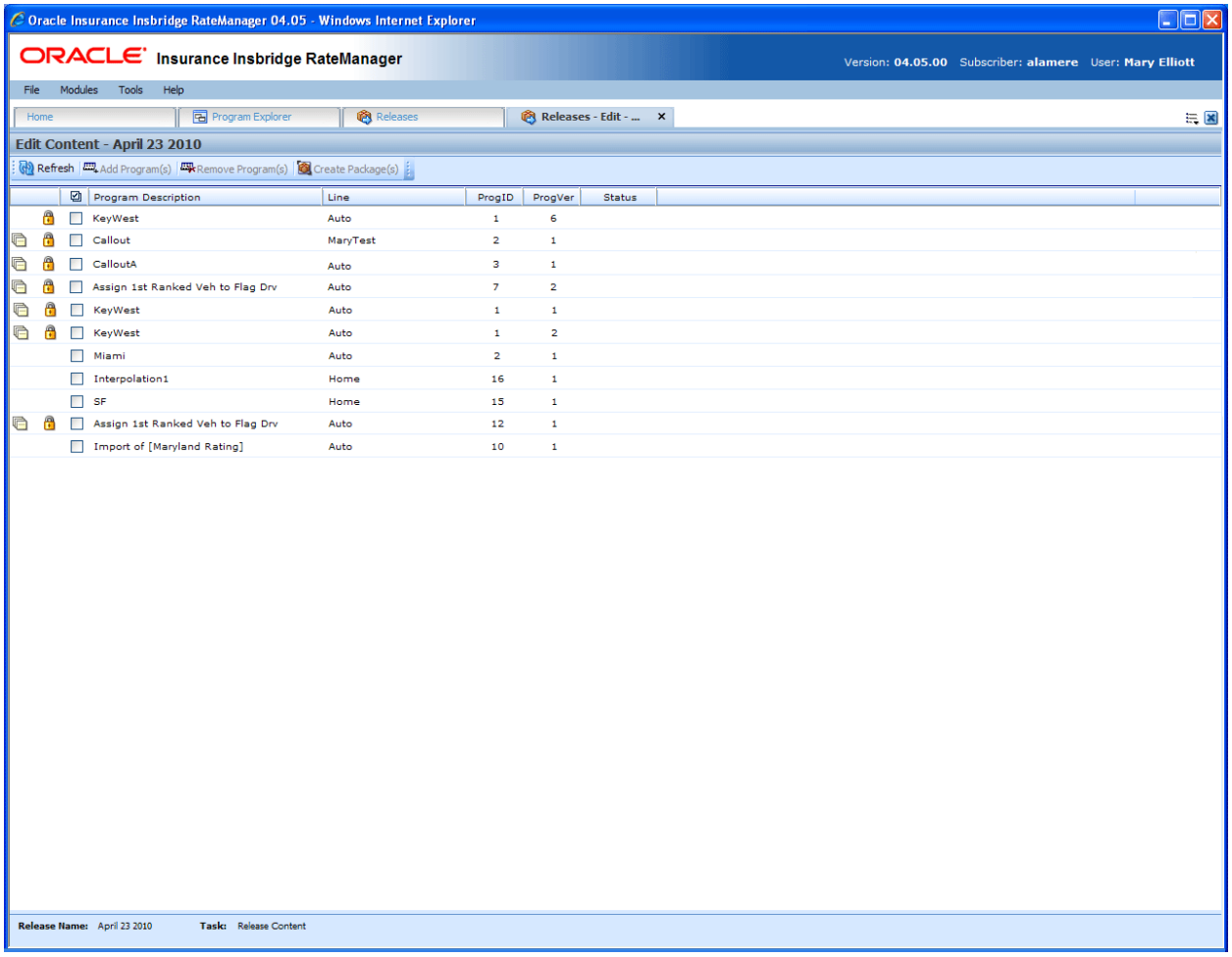



*Figure 89 Edit Package Programs*

# 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 created 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.

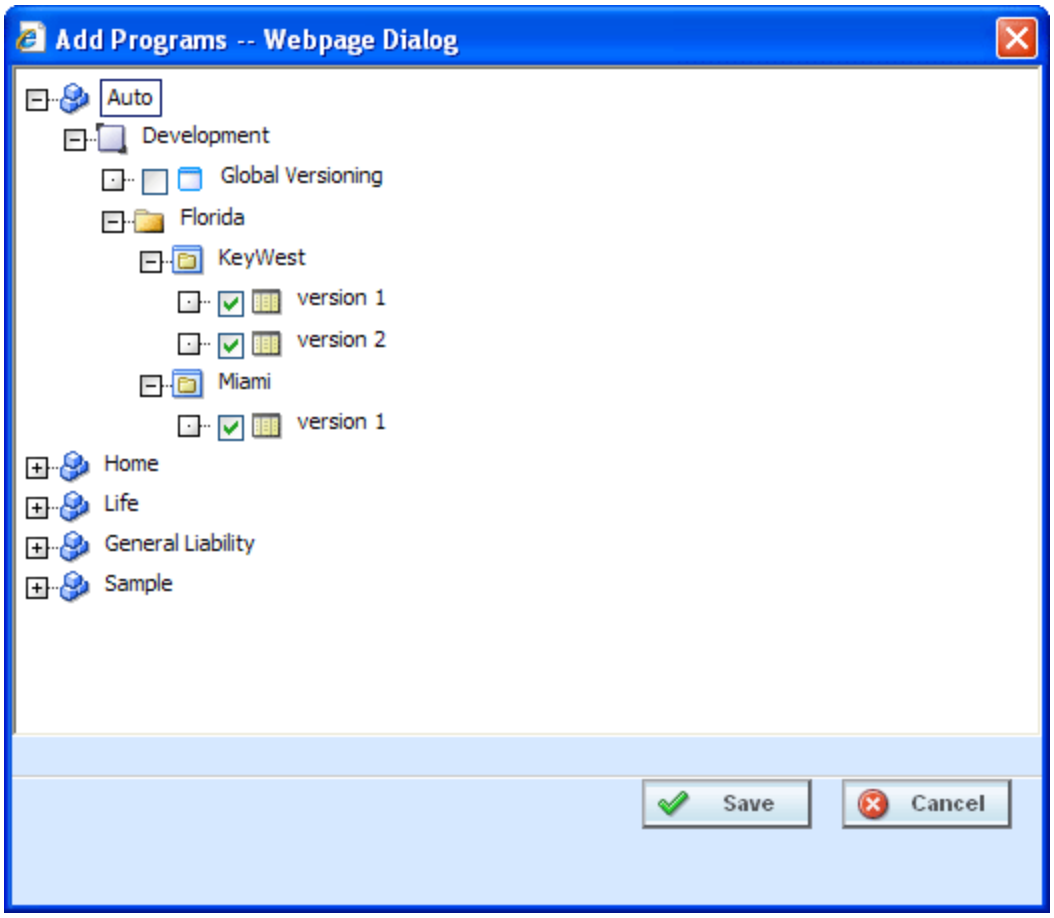



*Figure 90 Selecting Versions to Add to a Program*

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**.

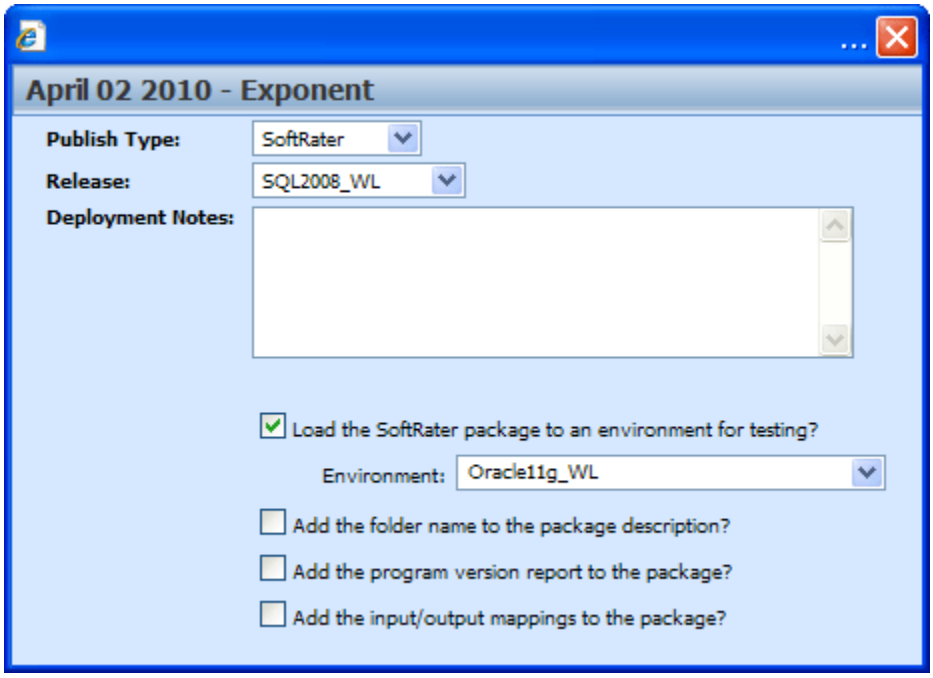



*Figure 91 Editing Program Packaging Options Allowing for Override*

## 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**.

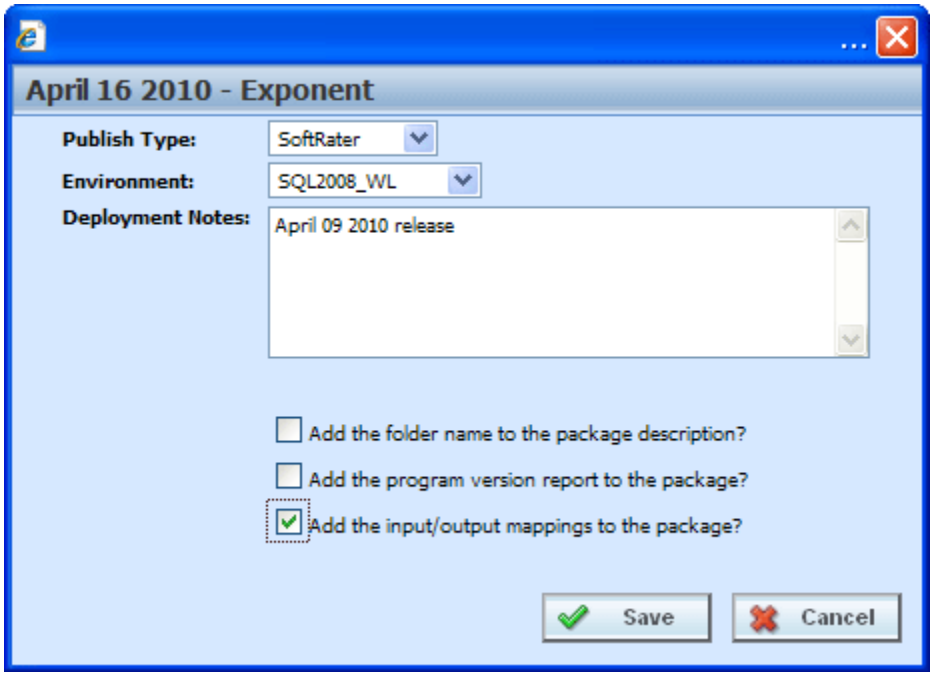



*Figure 92 Editing Program Packaging Options Not Allowing for Override*

### 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 4

# 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 created 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.

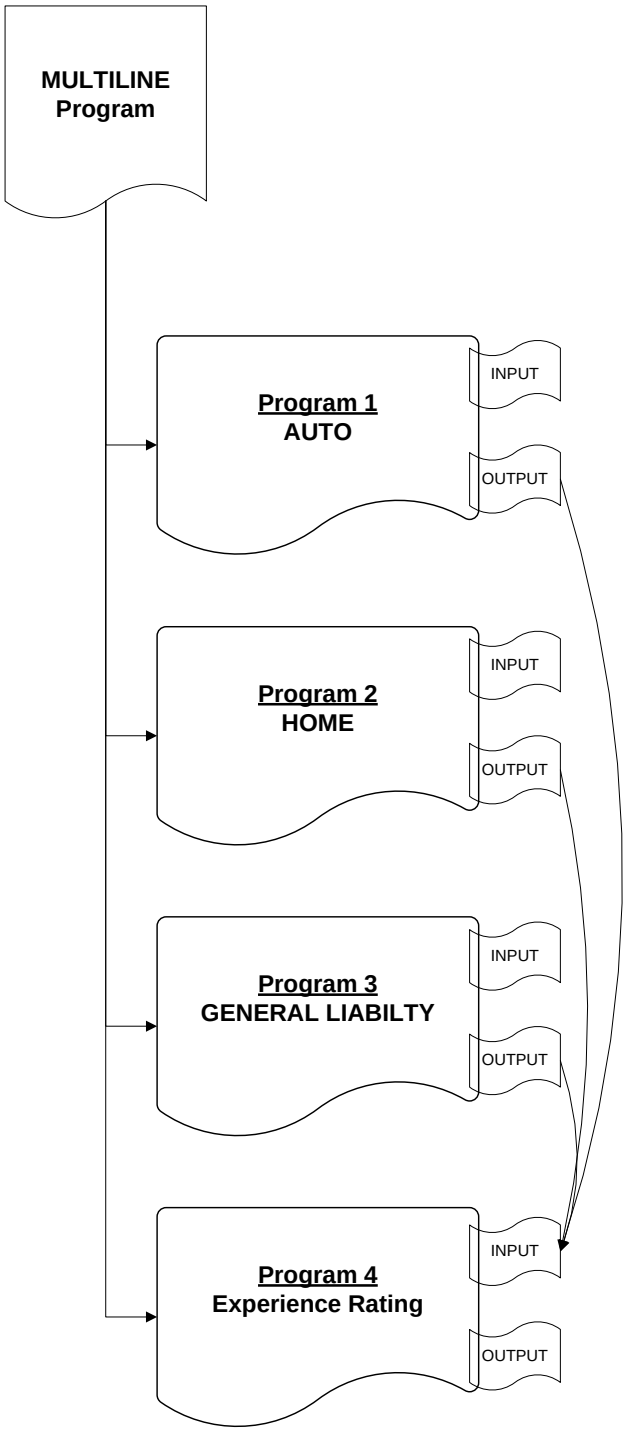
How you design your MultiLines program is up to you. MultiLines programs need to be planned out prior to entering the MultiLines tab. There are some things to remember when creating your programs for use in a MultiLines program:

- 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. When creating a multiline program you select a specific program version. If global versioning is used, the correct program version will be selected. If there is no global versioning package, the selected version will be used.
- 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 requires 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.

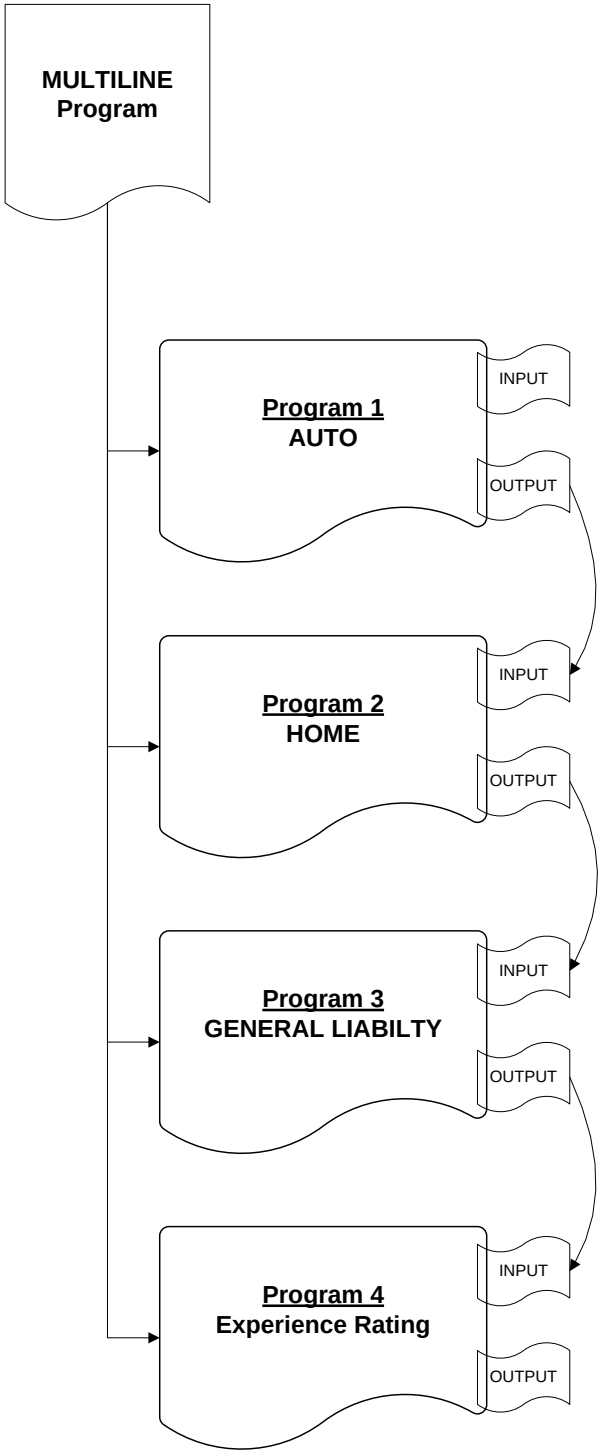
The mapping for program 3 requires that program 3 now be the source and program 4 remain the target. No additional inputs would be needed in program 3.

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.

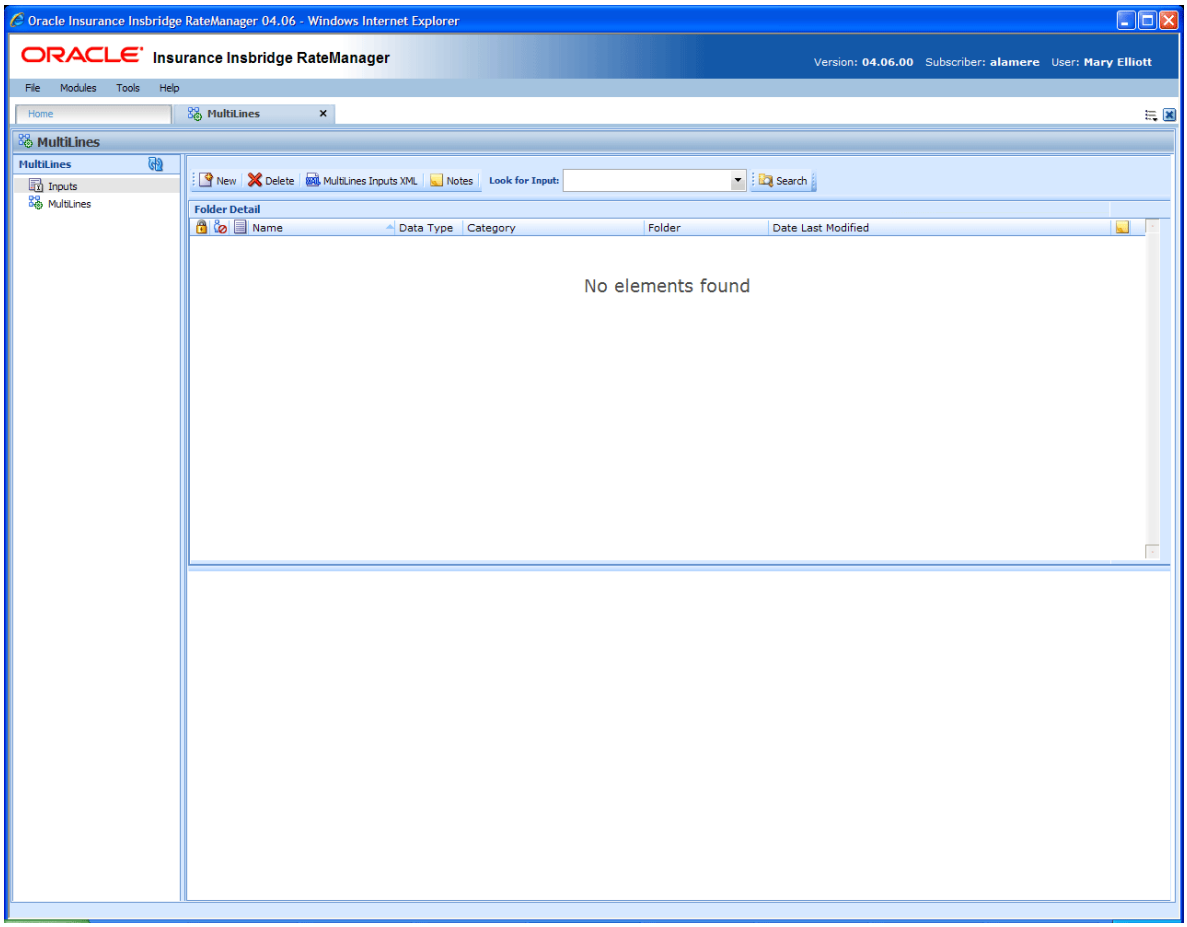



*Figure 93 MultiLines Inputs*

# 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: | **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 | **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.

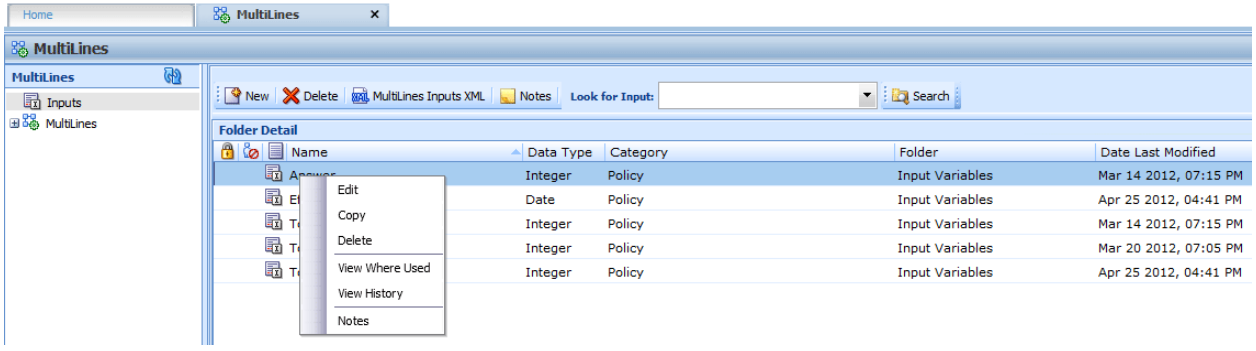



*Figure 94 MultiLines Inputs Right Click Menu*

- **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.

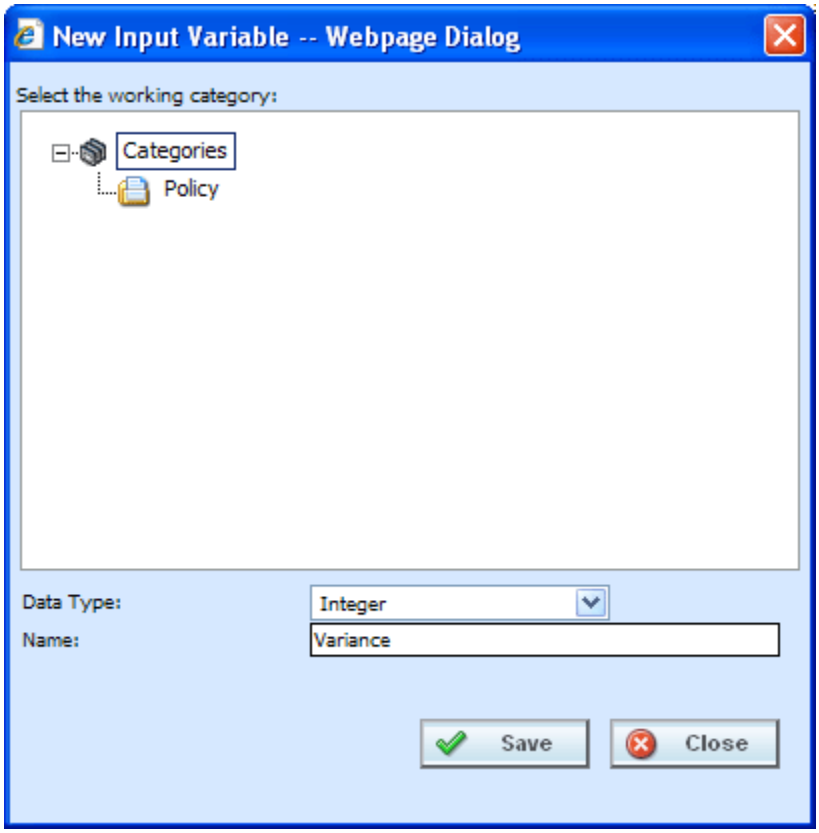



*Figure 95 Creating a New MultiLines Input*

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.

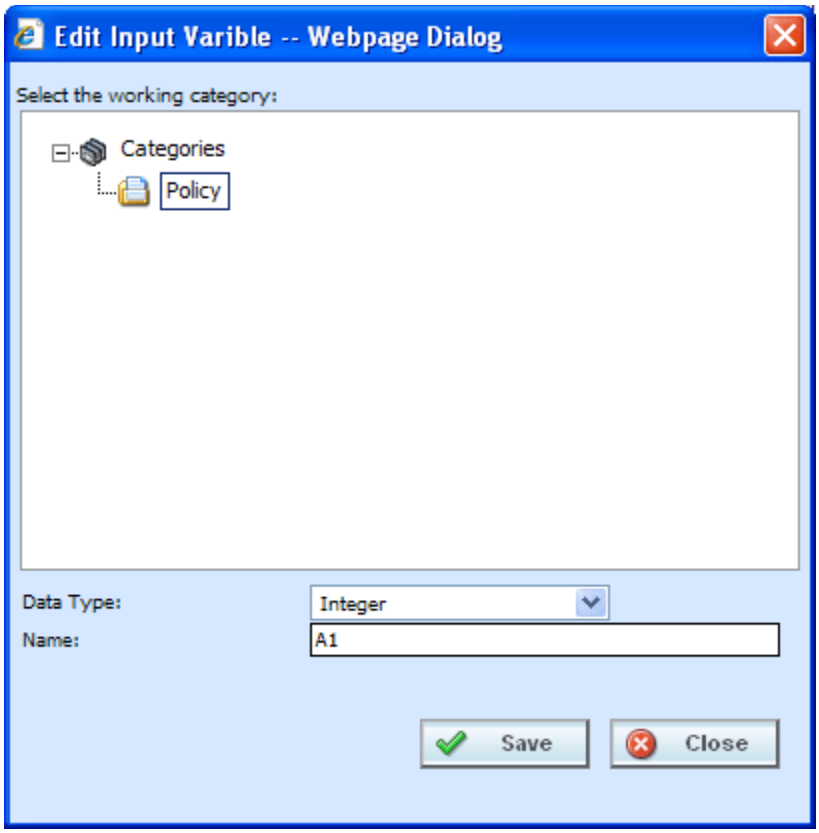



*Figure 96 Editing a MultiLines Input*

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.

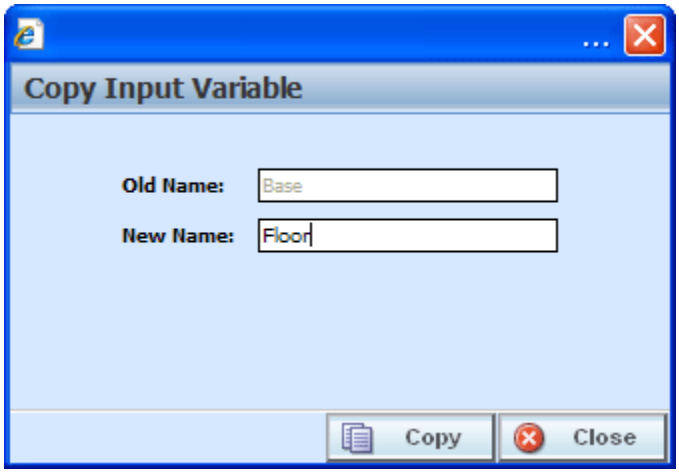



*Figure 97 Copying a MultiLines Input*

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.

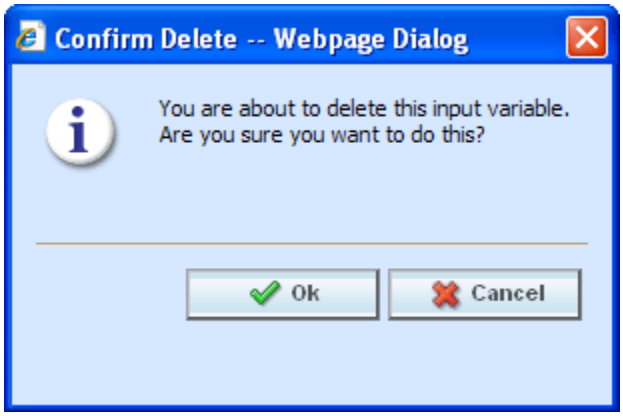



*Figure 98 Deleting a MultiLines Input*

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.

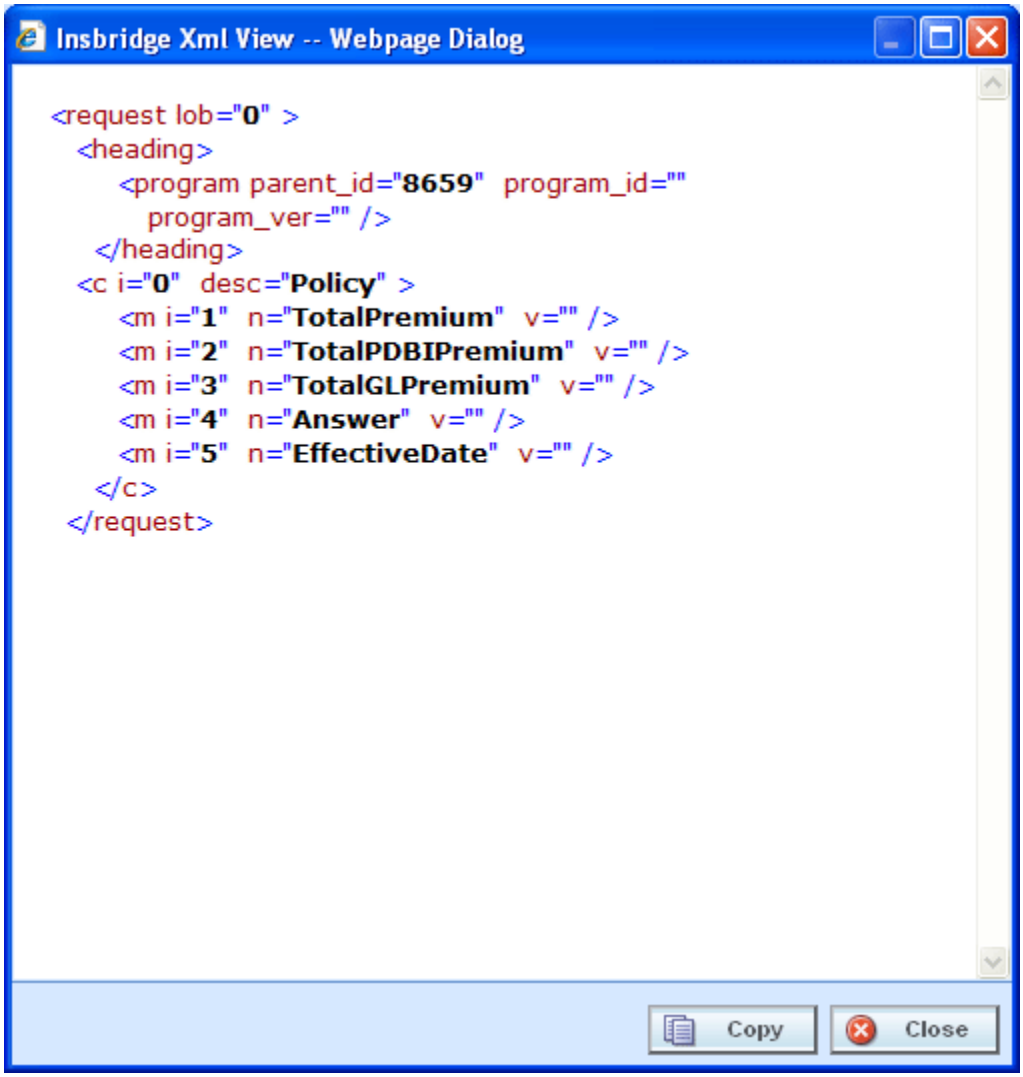



*Figure 99 MultiLines Inputs XML*

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 dependent programs for deployment.
- View MultiLines inputs XML.

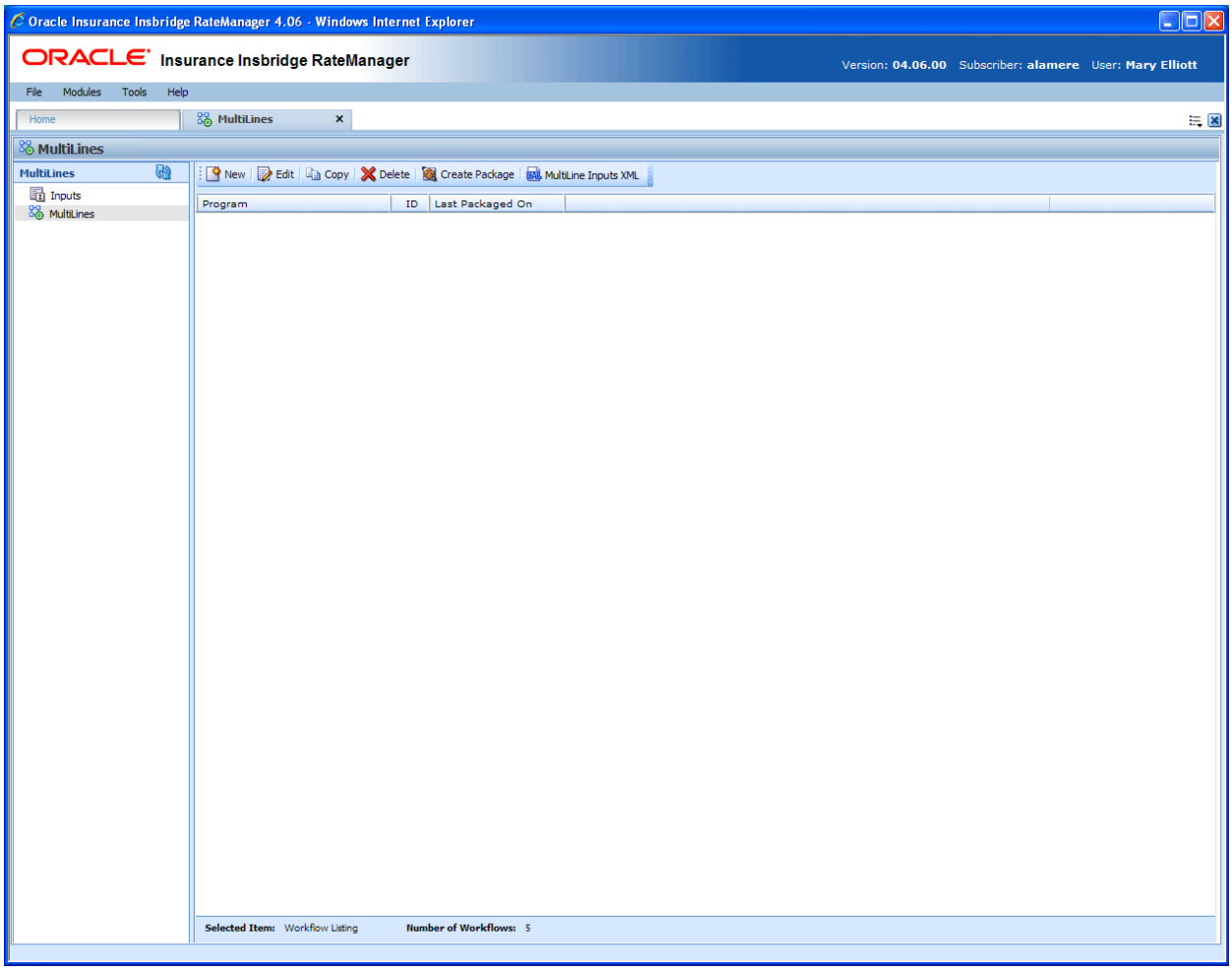



*Figure 100 MultiLines*

# 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**.

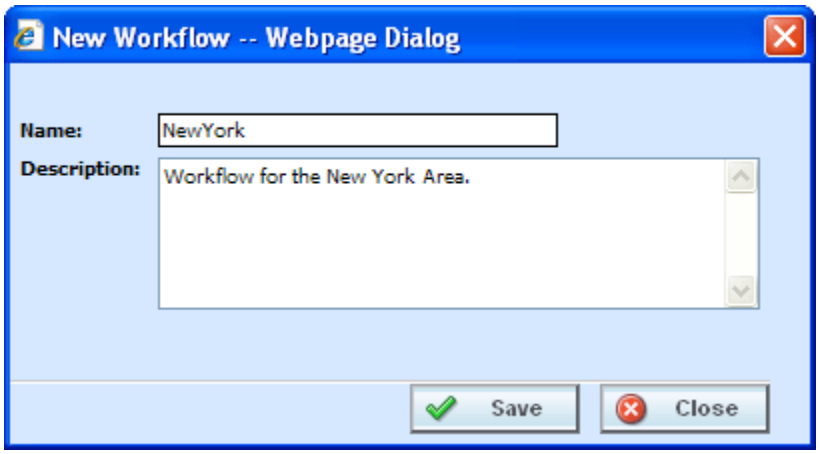



*Figure 101 Creating a New MultiLines*

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.

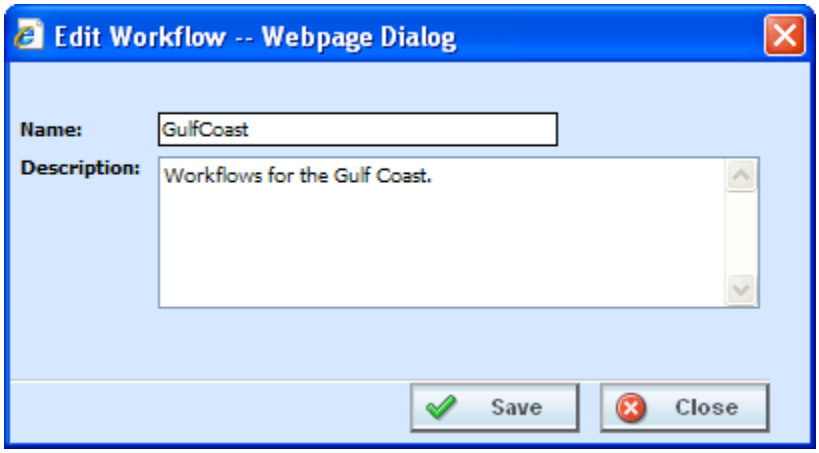



*Figure 102 Editing a MultiLines*

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.

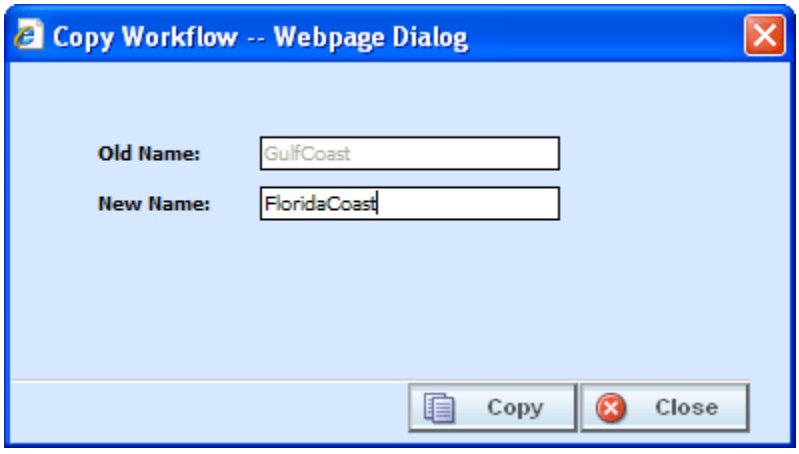



*Figure 103 Copying a MultiLines*

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.

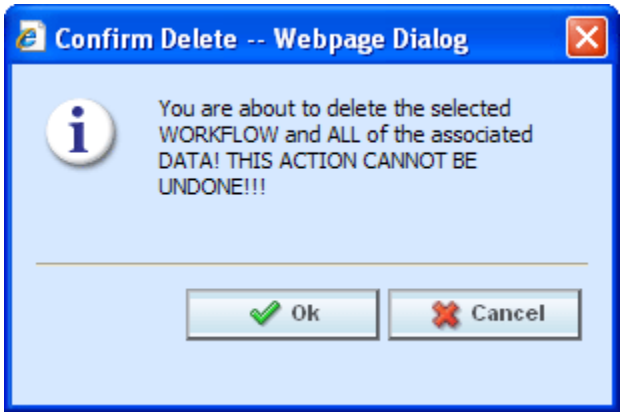
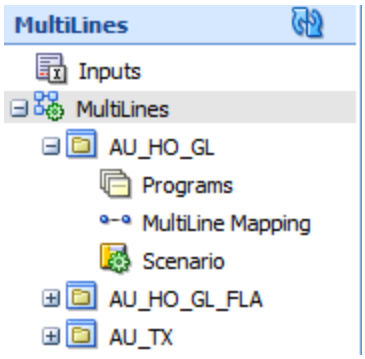



*Figure 104 Deleting a MultiLines*

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.




When creating a multiline program you select a specific program version. If global versioning is used, the correct program version will be selected. If there is no global versioning package, the selected version will be used. You must create a global versioning package for the program where you want to use global versioning.

## 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.

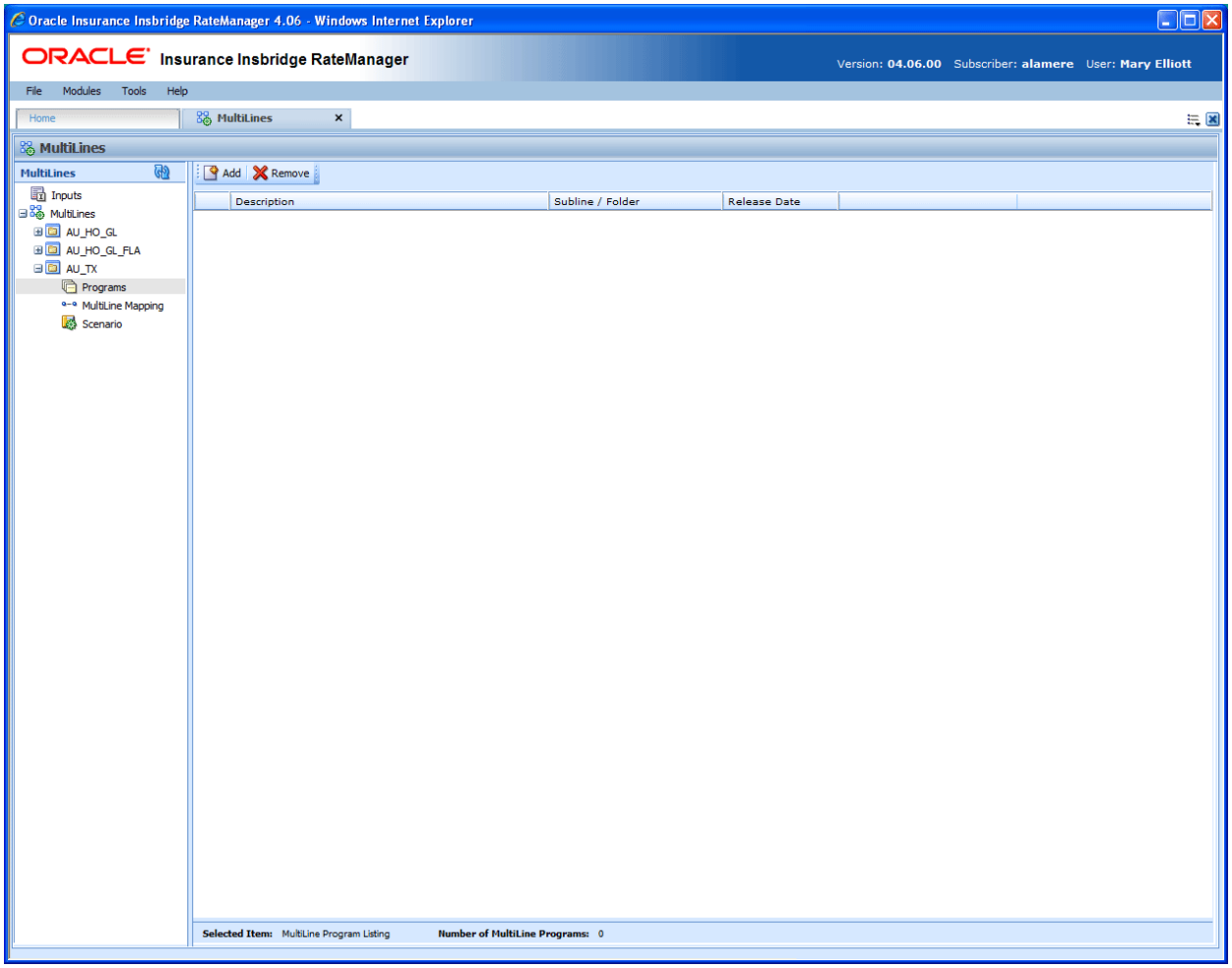



*Figure 105 MultiLines Programs*

## 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.

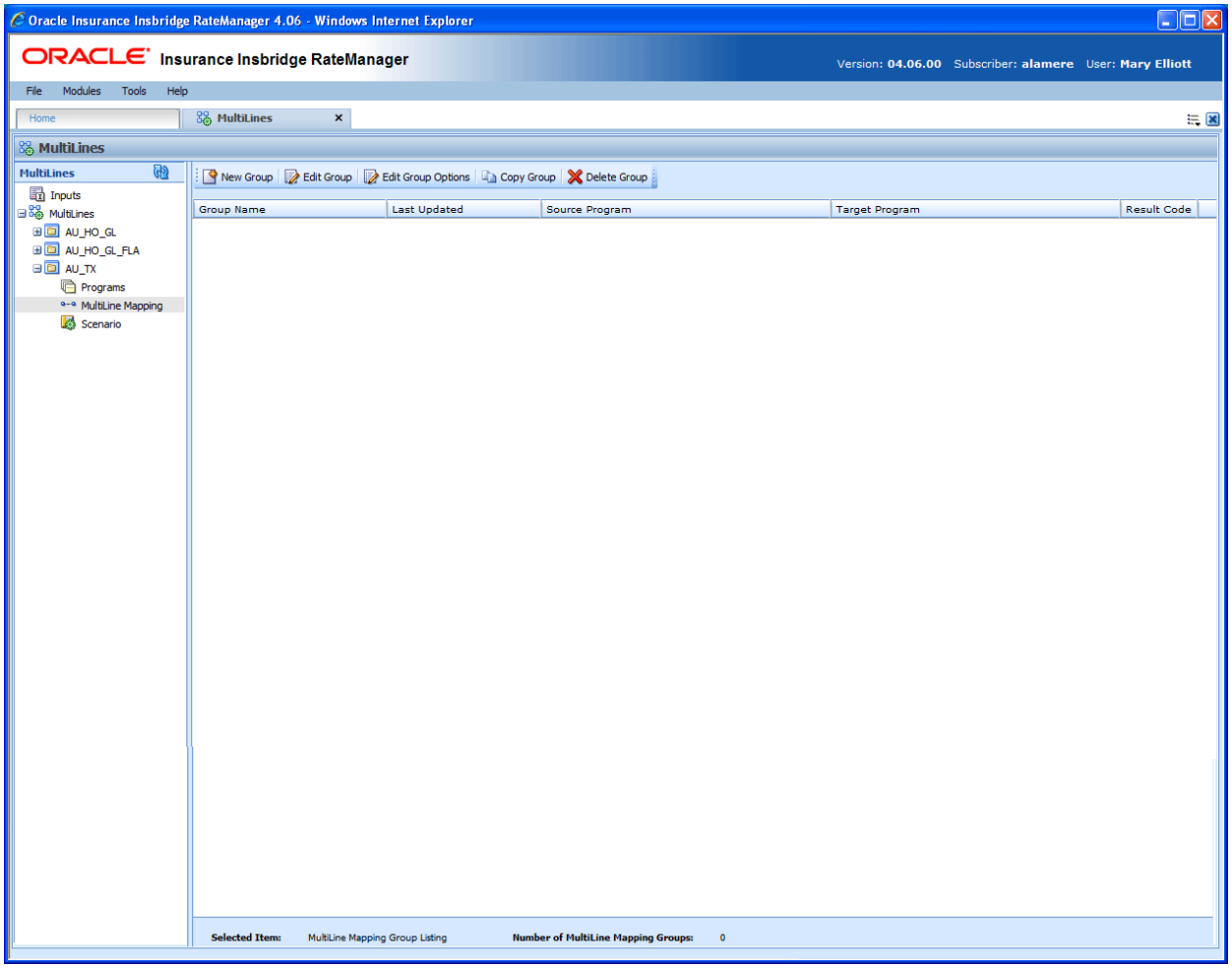



*Figure 106 MultiLines Mapping*

**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.

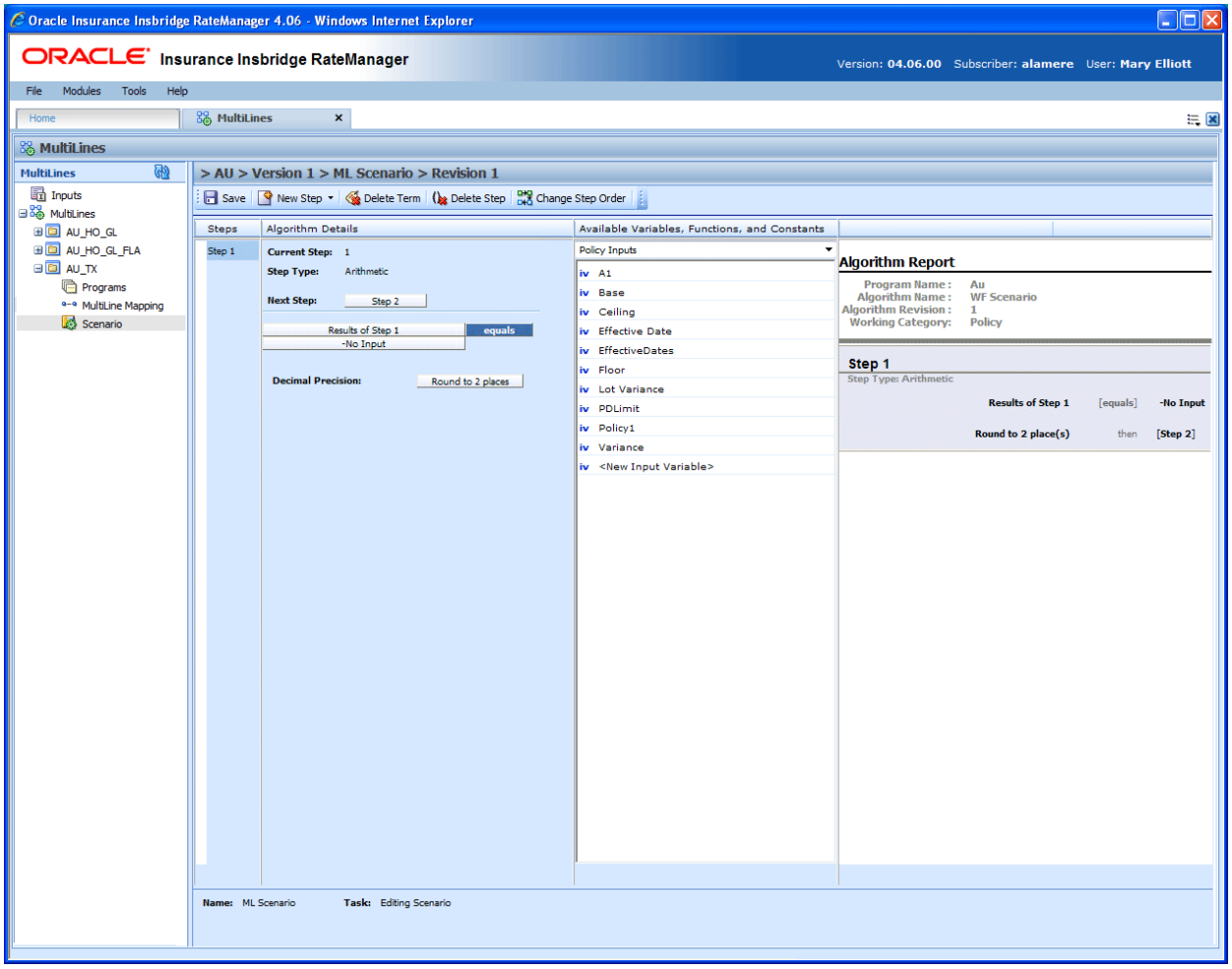



*Figure 107 MultiLines Scenario*

## 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 5

# LIBRARY

The Library tab is a central repository within RateManager where export programs, template programs, public XML files, and custom XML files are stored and managed. The 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 public XML option allows users to upload a single program created in an outside source using standard XML format, in to RateManager. The custom XML 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.

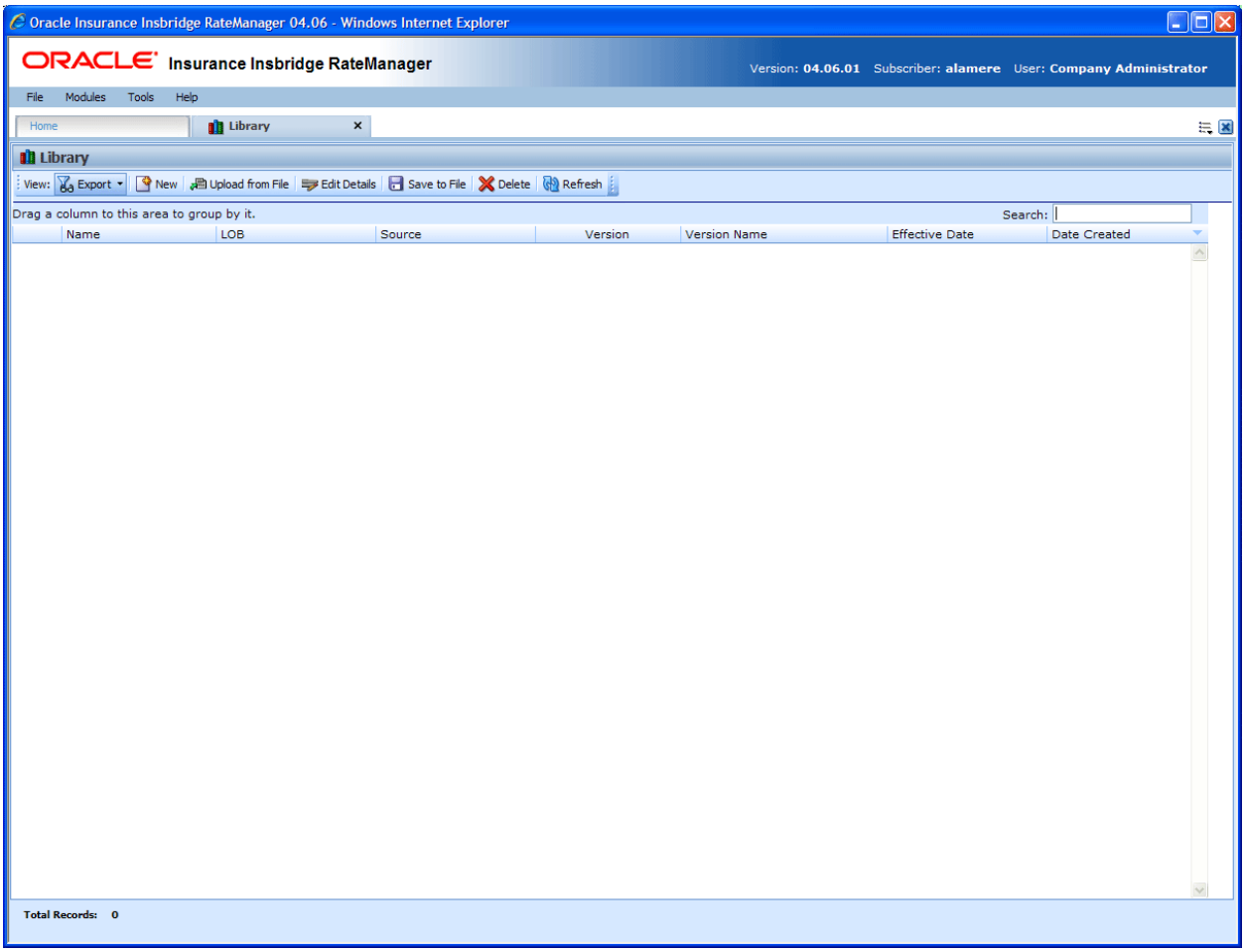



*Figure 108 Library*

From the Library tab you can:

- Create a new template or export program
- Edit a template, export program, custom XML, or public XML file.
- Save a template, export program, custom XML, or public XML file to your local hard drive
- Upload a template, export program, custom XML, or public XML file from your local hard drive
- Delete a template, export program, custom XML, or public XML file
- Apply a template, export program, or Public XML file

## 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, user created and template generated.

- Indicates **User Created** sublines

- Indicates **Template generated** sublines

User created sublines can be created from the Library tab by users with permissions to manage sublines. If the option to create a subline is not available to you, please contact your system administrator for permissions.

### Working with Sublines and Templates

Template generated sublines are created when you apply a template 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 InsbridgeERC, you will create another subline InsbridgeERC. You can have many template generated sublines.

The first time a template is applied under a line of business two items are 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 is 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 applied 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 apply one of these templates, it will be placed in the Content Services subline - the original name. You will not have a new subline created.

### Working with New Sublines and New Programs

Export programs and public XML files can only be applied to user created sublines. A user created subline allows for all elements within the subline to be edited or deleted. Elements are not automatically locked. Each line automatically has one user created subline placed underneath it. This subline is named with your subscriber description and is the *default* subline. Export programs, and public XML files can be placed under the default subline. If globals need to be separated or you want to keep elements unique to the subline, another user created subline can be created by a user with subline management permissions.

## LIBRARY OPTIONS

There are four options on the Library tab:

- Export
- Templates
- Custom XML
- Public XML

## Exports

The export and template screens look similar and have similar functionality. The main difference is that programs on the export screen can be applied to user created sublines only and template programs can be applied to the creating subscriber subline only. You cannot apply export programs to any template generated subline and you cannot apply templates to your default subline.

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.

- 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 includes 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.

**NOTE:** *Previous import/export programs are not accepted into the Library tab Exports option.*

## 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 upload and apply templates. If your group has the rights to program export, you will be able to export templates.*

## Custom XML

Frequently used custom XML mapping templates can be uploaded in to the Library tab and then used by any program that uses custom mappings. Custom XML files can be for input, output, or both.

ACORD XML templates are provided for 23 Lines of Businesses, available from the SDK directory where Insbridge is installed. Accessing the templates requires permissions to the SDK file on the server where Insbridge is installed. Please contact your system administrator for access.

The maximum file size is 10mb.

## Public XML

Public XML allows users to upload a single program created in an outside source using standard XML format, in to RateManager.

Public XML files are created outside of RateManager. A public XML file can be a complete single program version, from categories to output mapping or a partial single program version for example, only categories and table variables. To bring a public XML file in to RateManager, the file must be in a zip format.

If categories are not present, the applied XML file will fail. Public XML will allow users to upload an XML file with program details, categories and one or no other elements or a complete program including global and local elements plus sequencing and mapping.

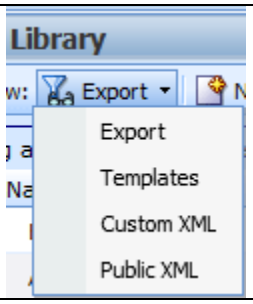
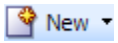
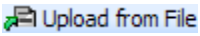
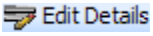
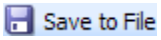
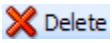
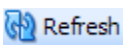
An applied public XML file can be view, edited, updated or deleted. There are no locks on any elements or restrictions on actions to the program.

All elements and programs will be a single version or revisions. Multiple element revisions and programs with multiple versions cannot be created using Public XML.

For more information on creating a public XML file, please see the IBER Publix XML Format Guide.

## FUNCTIONALITY

The top bar menu contains the functions you can perform on this tab. The functions change depending on what option you select.

| | |
|---|---|
|  | **View:** Select the option you want to view. |
|  | **New:** Begins the process of creating a new export program or template.<br>This option is not available on Custom XML or Public XML. |
|  | **Upload from File:** Allows you to download an export program, template, custom XML file, or public XML file into the library from your local drive or network. |
|  | **Edit Detail:** Allows you to edit select details of the export program, template, custom XML file or public XML file. |
|  | **Save to File:** Saves a copy of the export program, template, custom XML file or public XML file to your local drive or network. |
|  | **Delete:** Deletes the selected export program, template, custom XML file or public XML file. |
|  | **Refresh:** Refreshes the screen. You may need to use this when uploading exported programs, templates, custom XML files, or public XML files. |
| | **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.

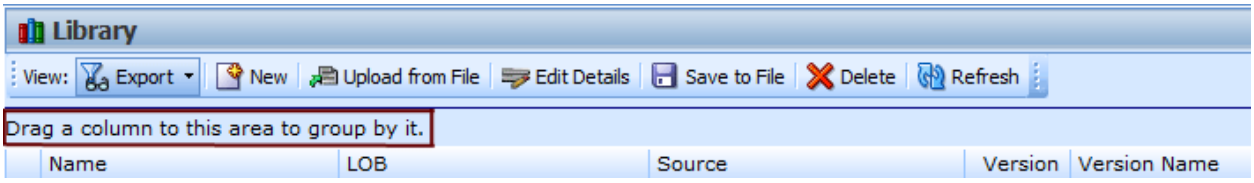



*Figure 109 Drag Column on Library Tab*

# FIELDS

The fields on the Library tab change depending on what the selected view is. For Export, Template and Public XML the displayed fields are:

**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.

**Effective Date:** The effective date of the program.

**Date Created:** The date the program template was created.

The fields for Custom XML are:

**Name:** The name of the XML file.

**Scope:** Indicates if the XML template is to be used for Input Mapping, Output Mapping or both.

**Available:** Indicates if the XML template should be available from the Input and/or Output Custom XML Mapping screens.

**Date Last Modified:** The date the file was added to the Library tab.

### Right Click Menus

The right click menus vary according to the option selected.

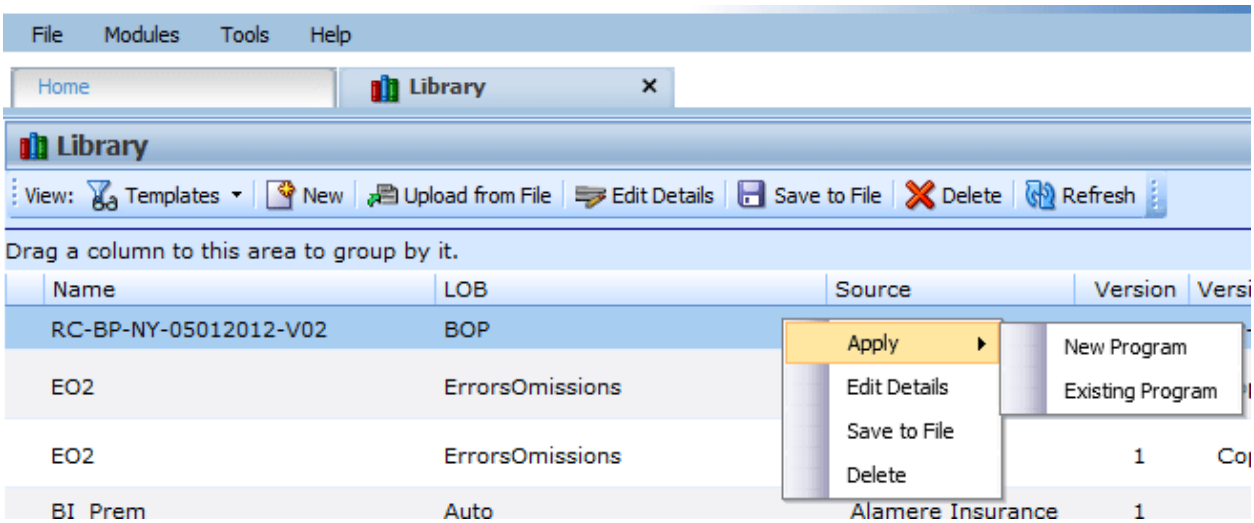



*Figure 110 Right Click Menu*

- **Apply:** Applies to a new program folders or sublines. Export and Public XML allow files to be applied to New Programs only. Templates allow for updated templates to be applied to existing program folders/sublines. Custom XML cannot be applied from the Library tab.
- **Edit Details:** For Exports, the name can be edited. For Templates and Public XML, the name and version can be edited. For Custom XML, the Mapping Scope and the Availability can be changed.
- **Save to File:** Saves the file to your local hard drive or network. Exports, Templates, and Public XML are saved as.srtp files. Custom XML files are saved as an .XML file.
- **Delete:** Removes the file from the Library.

# WORKING WITH EXPORTS

The Exports option allows you to:

- Create a New Export
- Apply an Export to a New Program
- Edit Export Details
- Delete an Export
- Save an Export to your local computer or network
- Upload an Export File

## Create a New Export

1. Navigate to the **Library** tab.
2. Select **Export** for the View.
3. Click on **New**. The New Program Export popup is displayed.
4. Select the **Program** you want to export.

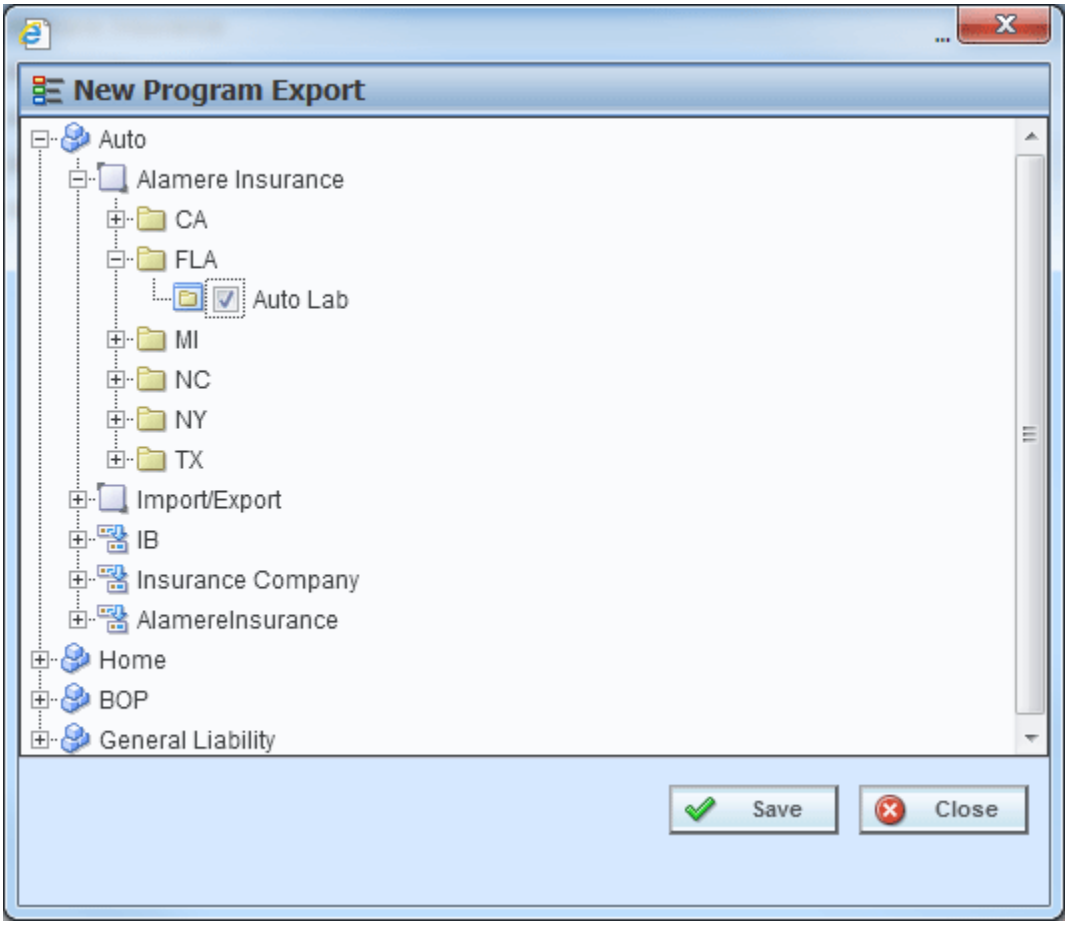



*Figure 111 Applying a New Template*

5. Click **Save**. The popup closes. When the screen refreshes, your export will be listed.

A spinning icon indicates that the creation process is occurring. If the icon continues, please click **REFRESH** to refresh the screen.

## Applying Exported Programs

Export 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 from Program Explorer and apply the correct program. Program names must be unique.

The Apply Program Export Wizard allows you to apply programs into RateManager. The applied program is placed into the same line of business that the program was exported from.

1. Select the **Export** you want to apply.
2. Click **Apply->New Program** to open the Apply Program Export wizard.

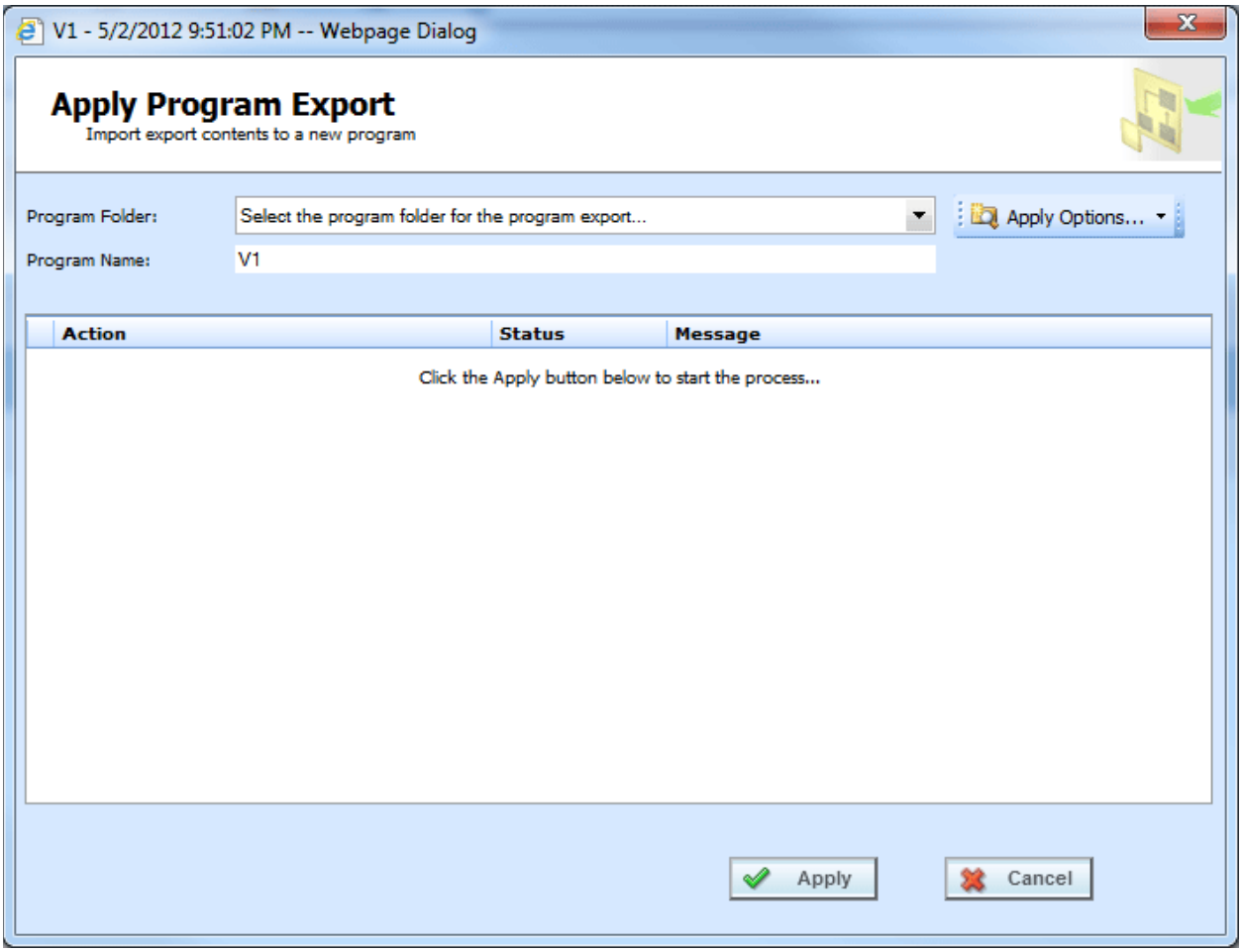



*Figure 112 Apply Export Start*

3. Select the **Program Folder** where you want the export to be applied.

4. You can update the **Program Name**.
5. Click **Apply** to start the wizard.
6. The wizard begins. A successful apply displays

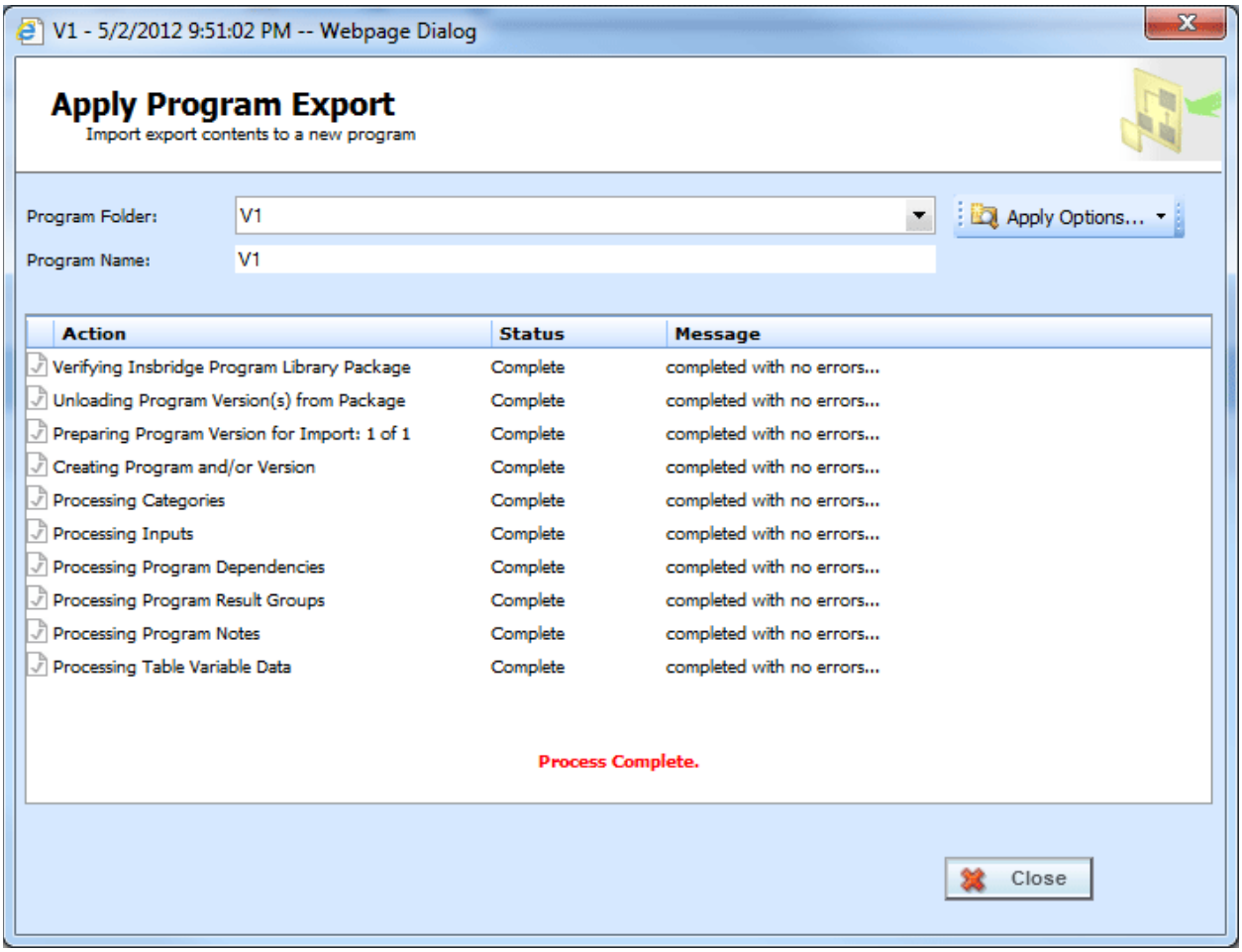



*Figure 113 Apply Export Finish*

If the Apply Program Export fails, a failure message will be displayed on the element that failed. Error logs are in IBFA and may require a system administrator to access.

### Errors in Exported Programs

Programs may complete the wizard but still contain errors. If an export contains errors an exclamation point is displayed in front of the export name. The only right click option will be to delete.

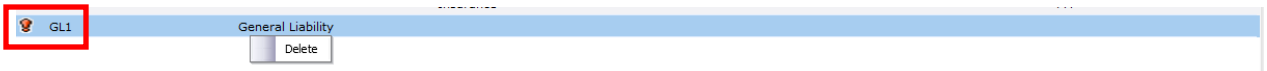



*Figure 114 Error in an Export Program*

## Apply Options

If the exported line is not activated in the current subscriber's RateManager, the Program Folder 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 applied. If you attempt to apply a non-activated line, an error message will be displayed.

Lines can be activated or created from the Apply Wizard. There are three Apply Options:

- **Manage Lines:** Use this option to active or create a line of business. This option can be used if you receive a *No LOB found* error message when applying an export. You may need the exact spelling of the line or the line number used. Permissions are needed to manage lines.
- **New Subline:** Use this option to create a new subline. A new subline can be created at any time. New sublines allow globals to be unique to the subline. Sublines are created using a name only. Permissions are needed to create sublines.
- **Manage Folders:** Allows you to create a new folder in the selected subline. To create a folder, you must select the subline first. New folders are created using a name only. Permissions are needed to create folders.

These options may be grayed out if you do not have permissions. If you are denied access, please contact your system administrator for permissions.

## Editing an Export

Exports can be edited at any time. Exports must be edited one at a time.

1. Select the **Export** you want to edit.
2. Click **Edit Details** to open the Edit Export popup.

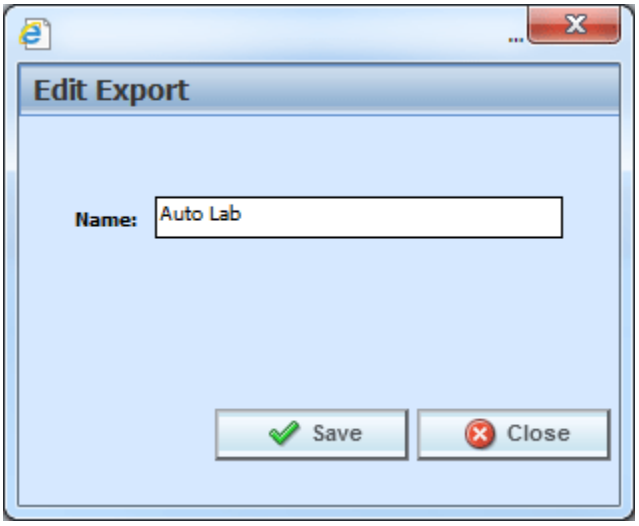



*Figure 115 Editing an Export*

3. You can change the **Name**.

4. When finished, click **Save** to save your entry and close the popup.

## Deleting a Template

Exports can be deleted at any time. Deleting an export from the library does not remove any applied export programs.

1. Select the **Export(s)** you want to delete.

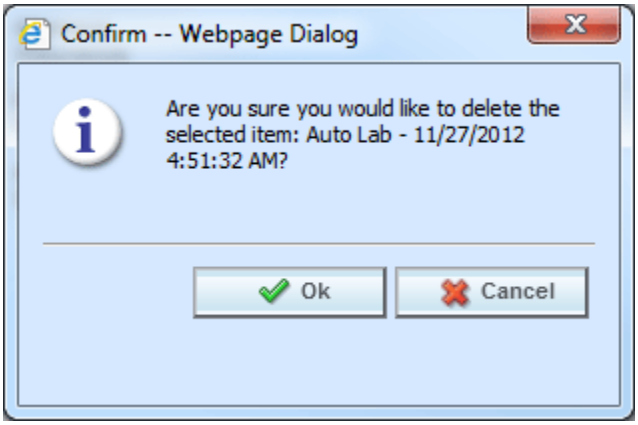



*Figure 116 Deleting a Template*

2. Click **Delete**. A separate screen is displayed. Select **OK** to delete the export. Click **Cancel** if this not the option you want. The export will be removed immediately.

# WORKING WITH TEMPLATES

The Templates option allows you to:

- Create a New Template
- Apply a Template to a New Program
- Apply a Template to an Existing Program
- Edit Template Details
- Delete a Template
- Reconcile Templates
- Save a Template to your local computer or network
- Upload a Template File

## 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. Select **Templates** for the View.

2. Click on **New** and the New Program Template Wizard is displayed.

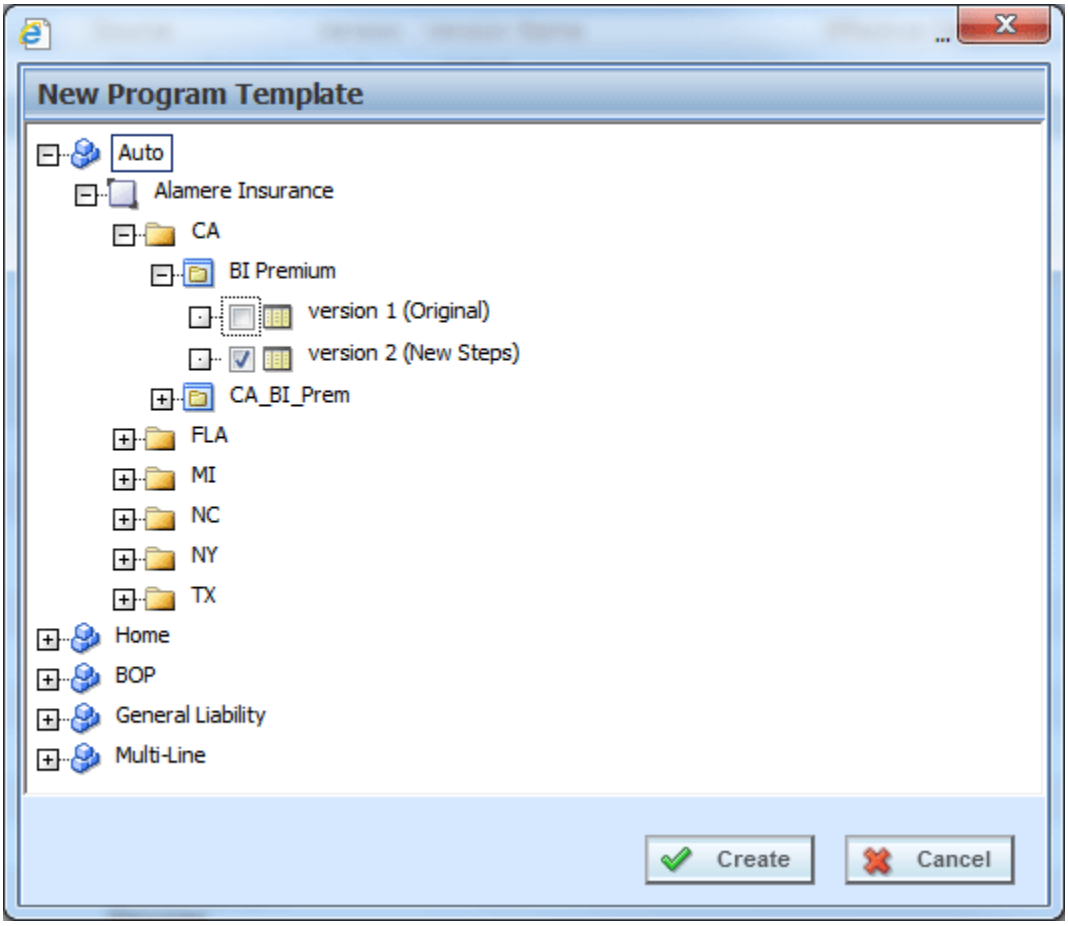



*Figure 117 Applying a New Template*

3. Select the **Program Version** where you want to create 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 refreshes. Your templates will be listed.

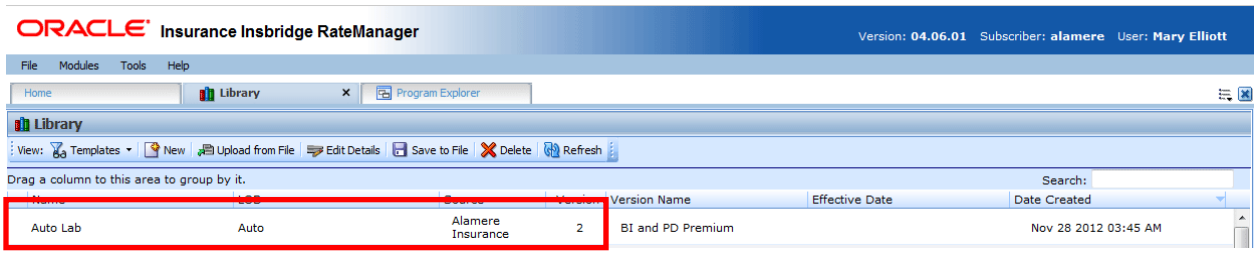



*Figure 118 Populated Library*

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.*

There are two icons that may appear on the library screen:

The two arrows icon indicates that the creation process is occurring. If the icon continues, please click the refresh button to refresh the screen.

The exclamation point icon indicates that there was a problem creating the template. Hover your cursor over the icon to see what the issues are.

## 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. Select the **Template** you want to apply.
2. Right click to get the menu. Select **Apply→New Program**. A separate window is displayed.

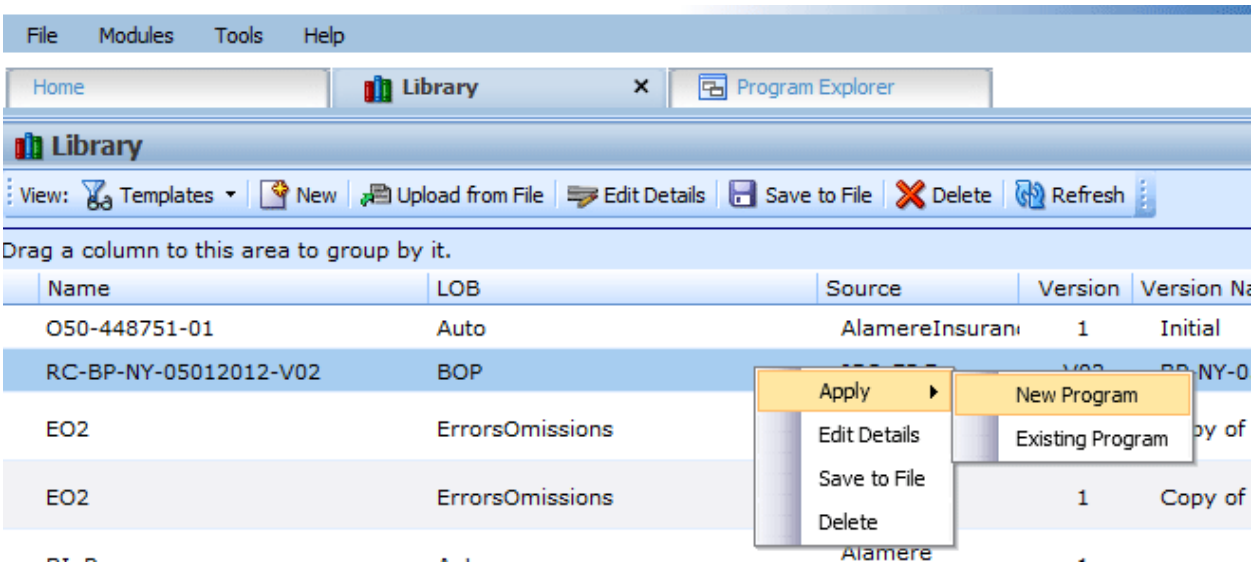



*Figure 119 Applying a New Program*

3. Select the **Program Folder** where you want the template to be applied.

**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.*

**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.*

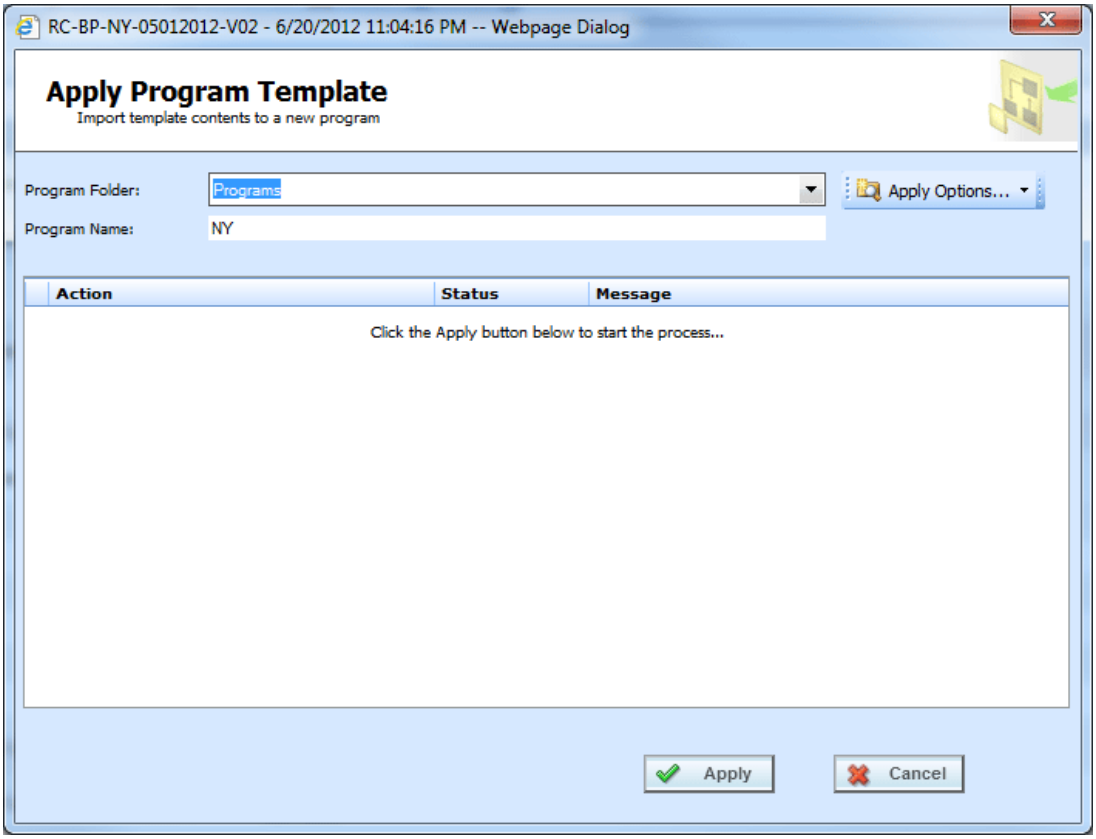



*Figure 120 Selecting Program Folder*

4. You can update the **Program Name**.
5. Click **Apply** to start the wizard.
6. The wizard begins. A successful apply displays a Process Complete message.

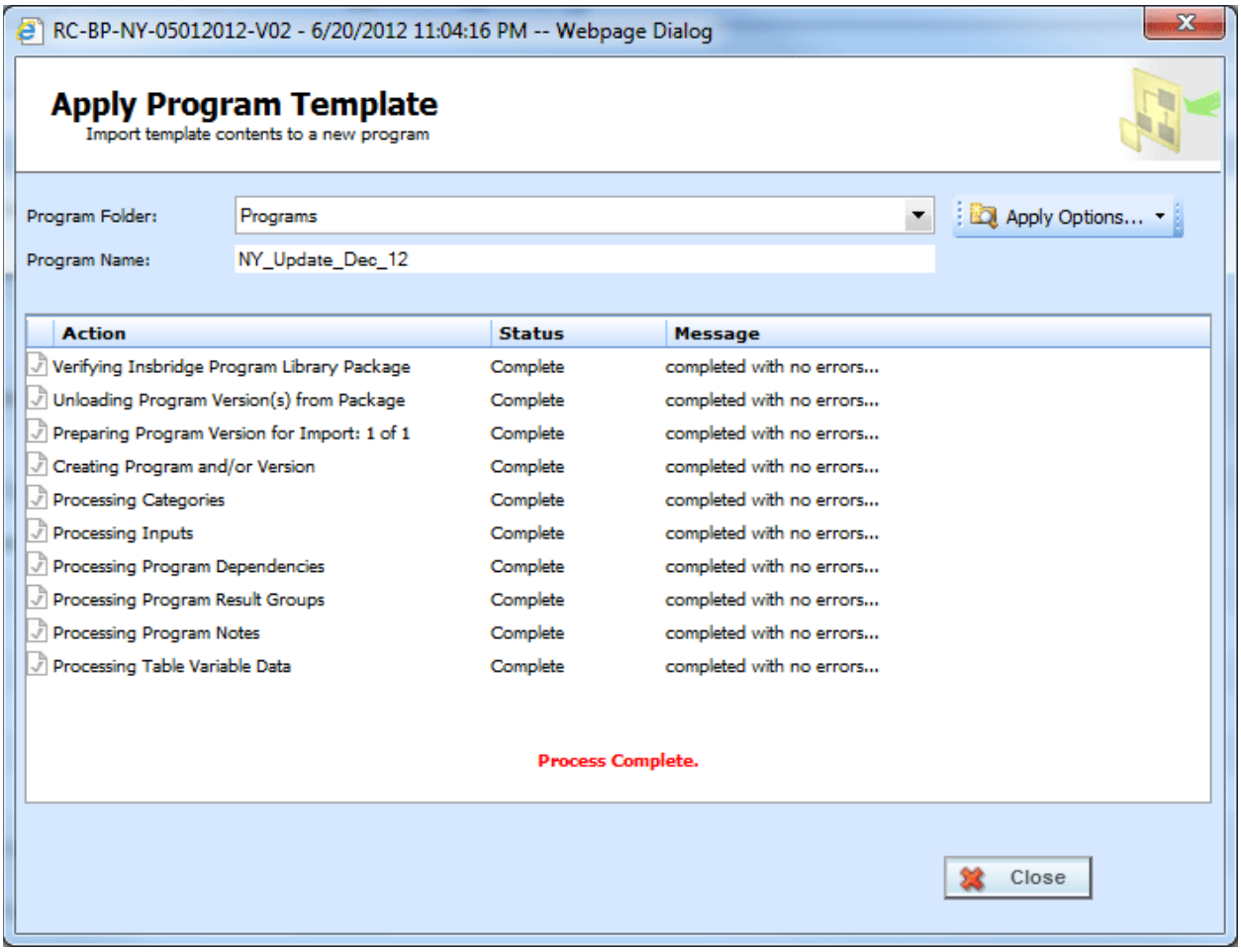



*Figure 121 Applied Template*

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. Select the **Template** you want to apply.

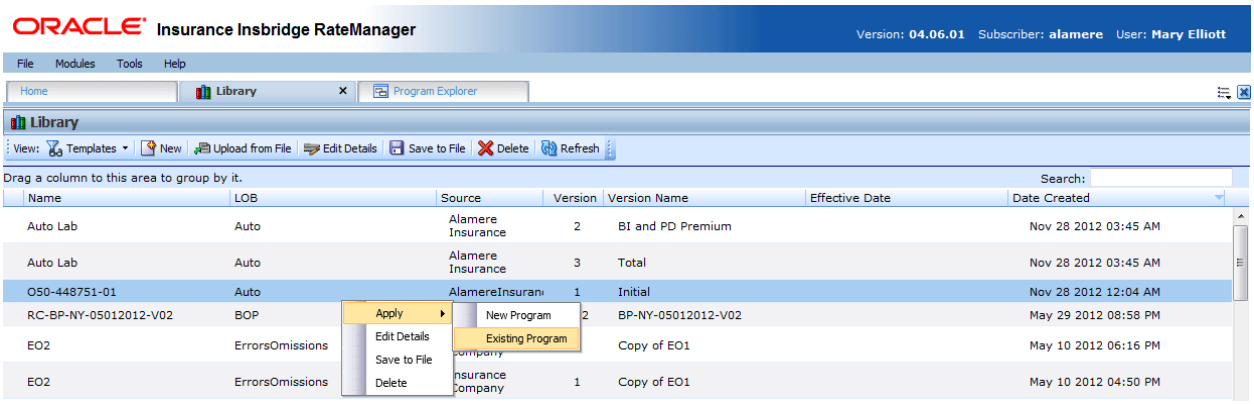



*Figure 122 Applying Template to Existing Program*

2. Right click to get the menu. Select **Apply→Existing Program**. A separate popup window will be displayed.

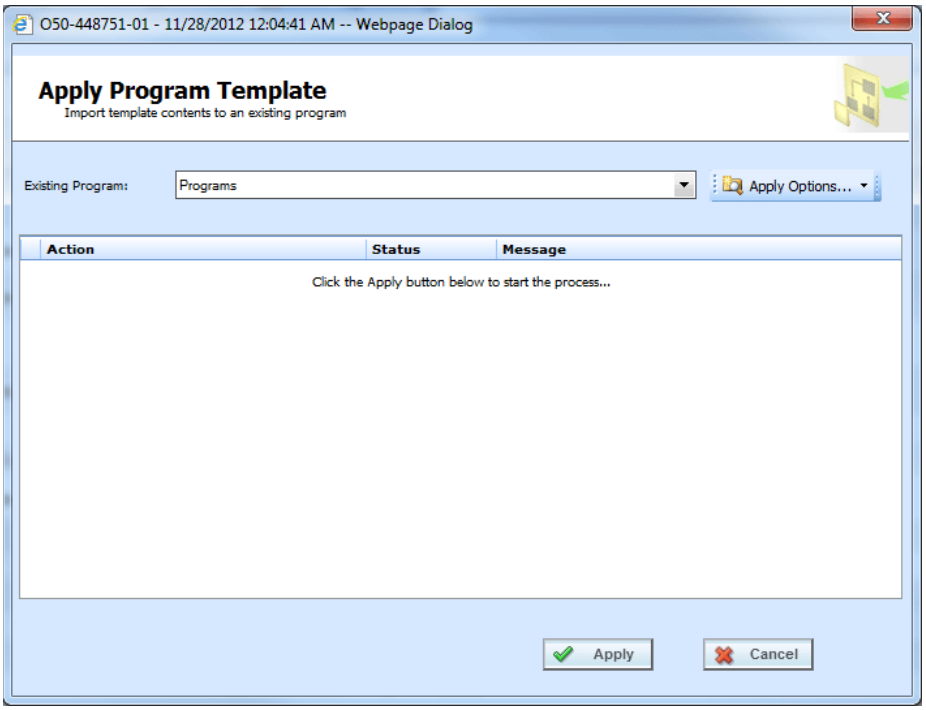



*Figure 123 Applying a Template to an Existing Program*

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 lists the actions taken and success or failure.

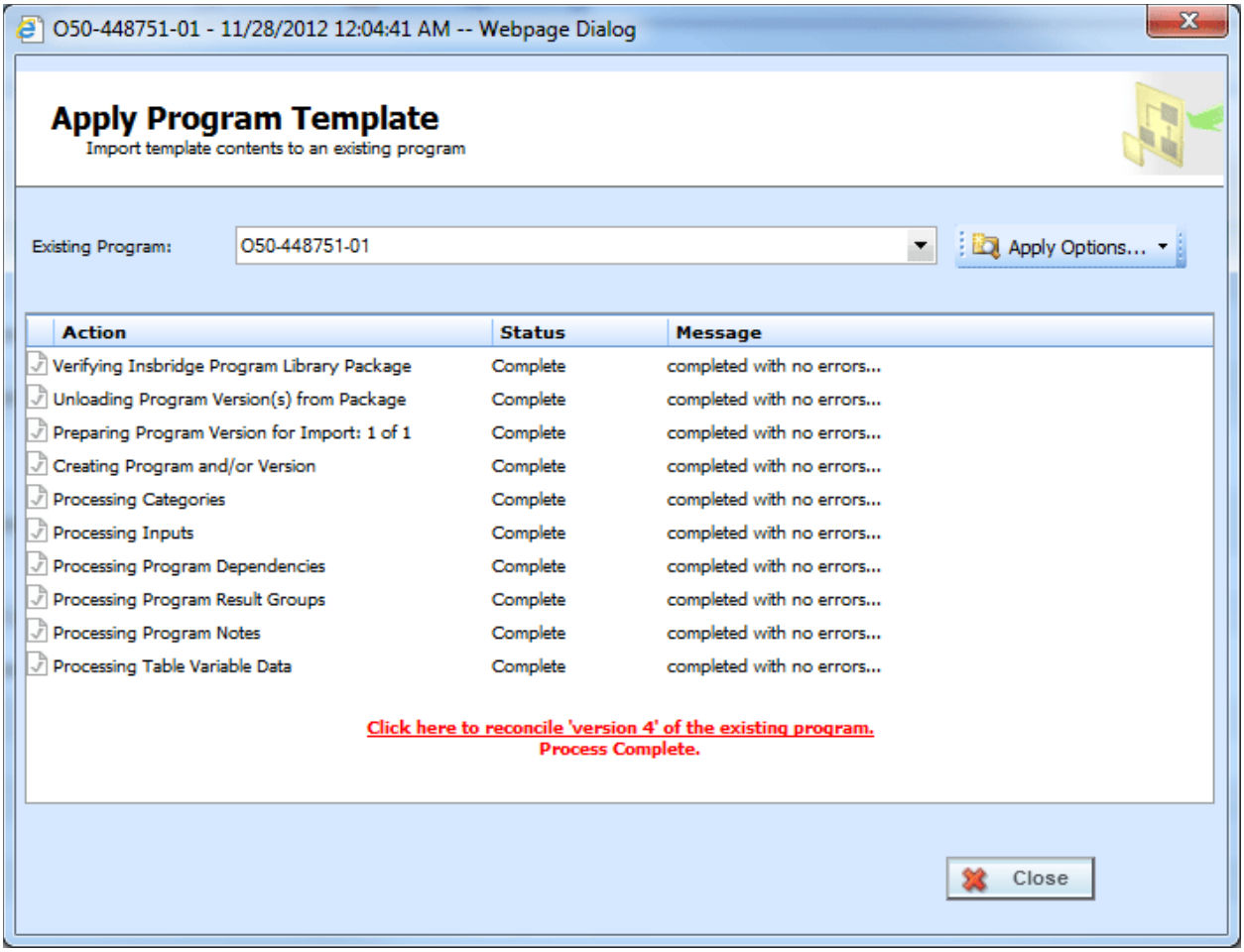



*Figure 124 Successful Template Applied to an Existing Program*

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 opens the Reconciliation wizard. This allows you to see the differences between this version and the previously applied version. See Reconcile for more information.

## 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.
2. Click **Edit Detail** to open the Edit Template popup.

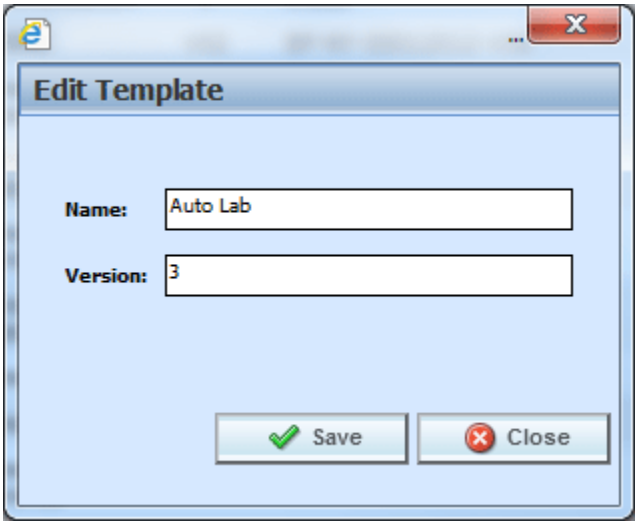



*Figure 125 Editing a Template*

3. You can change the **Name** and **Version**.
4. When finished, click **Save** to save your entry and close the popup.

## Deleting a Template

Templates can be deleted at any time. Deleting a template from the library does not remove the template program from the subline.

1. Click on the **Template(s)** you want to delete.

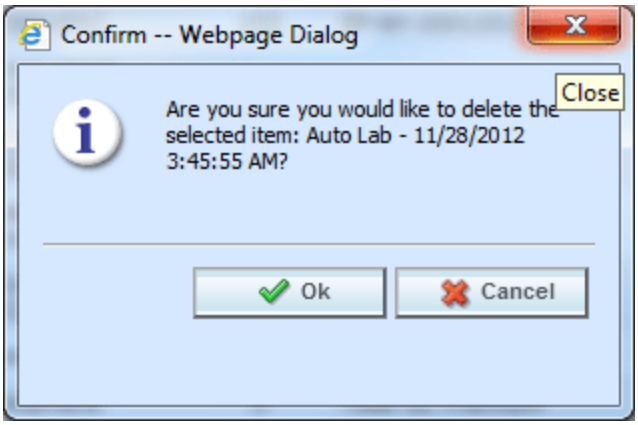



*Figure 126 Deleting a Template*

2. Click **Delete**. A separate screen will be displayed. Select **OK** to delete the templates. Click **Cancel** if this not the option you want.

# RECONCILE

The Reconcile option allows you to reconcile one program version against another. For example, when a new template is applied 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.

### To Reconcile Two Templates

1. Click the link at the bottom of the Successfully Applied Template wizard. Only programs with more than one version will have this option available. This will take you to the Reconciliation wizard.

*Figure 127 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.

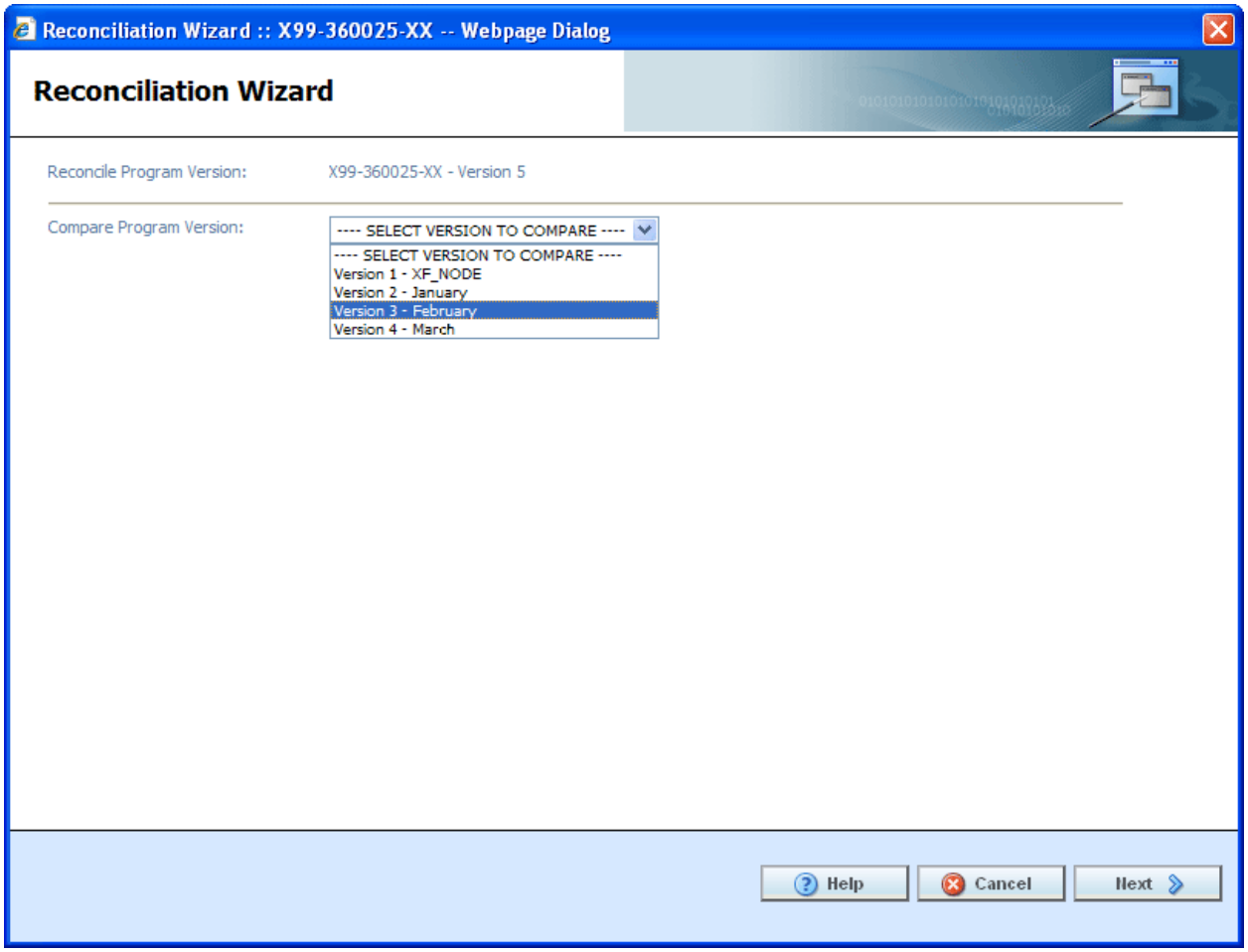



*Figure 128 Selection Versions to Compare*

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-apply 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.

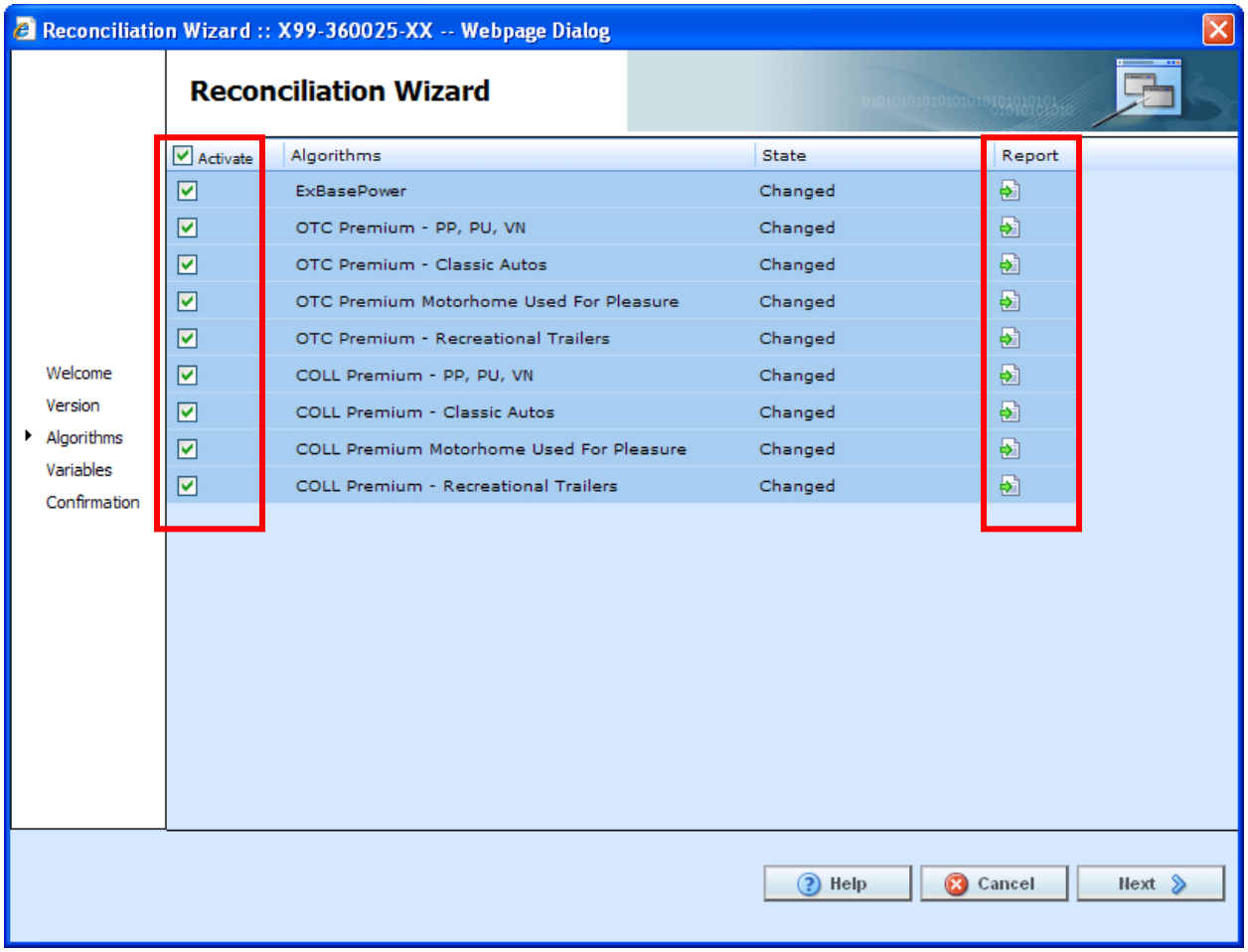



*Figure 129 Reconciling Algorithms*

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.

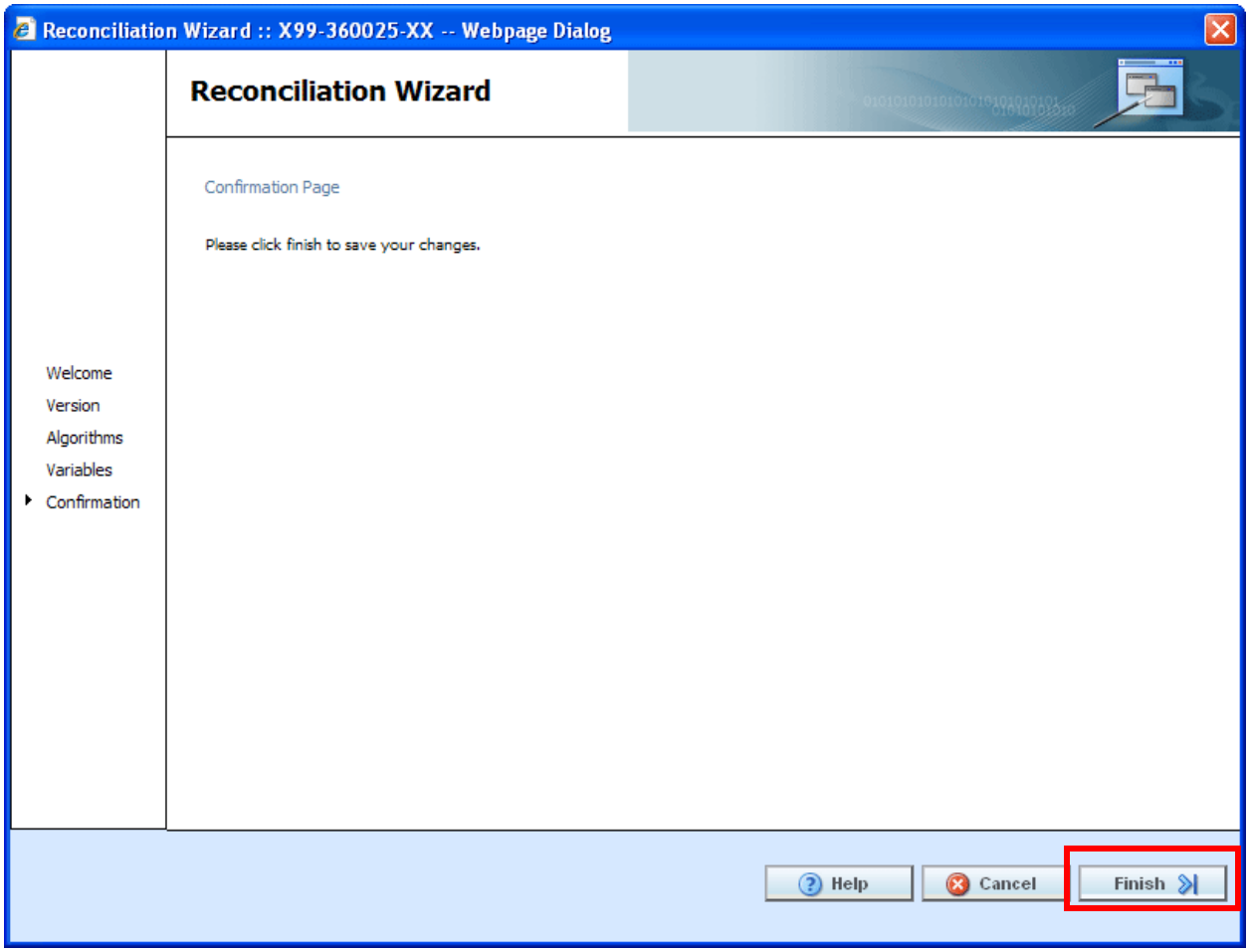



*Figure 130 Confirmation of Template Reconciliation*

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.

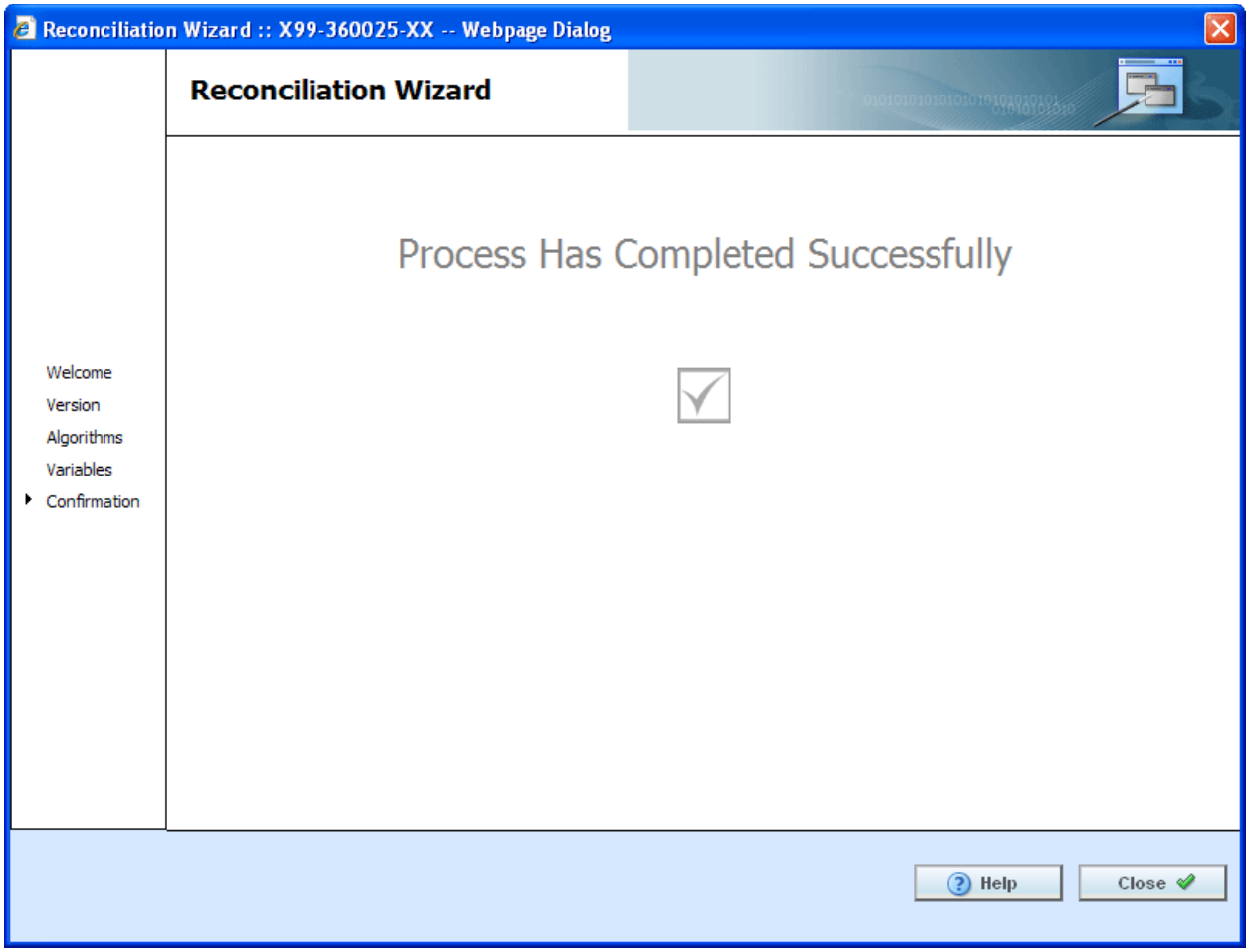



*Figure 131 Successful Template Reconciliation*

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.

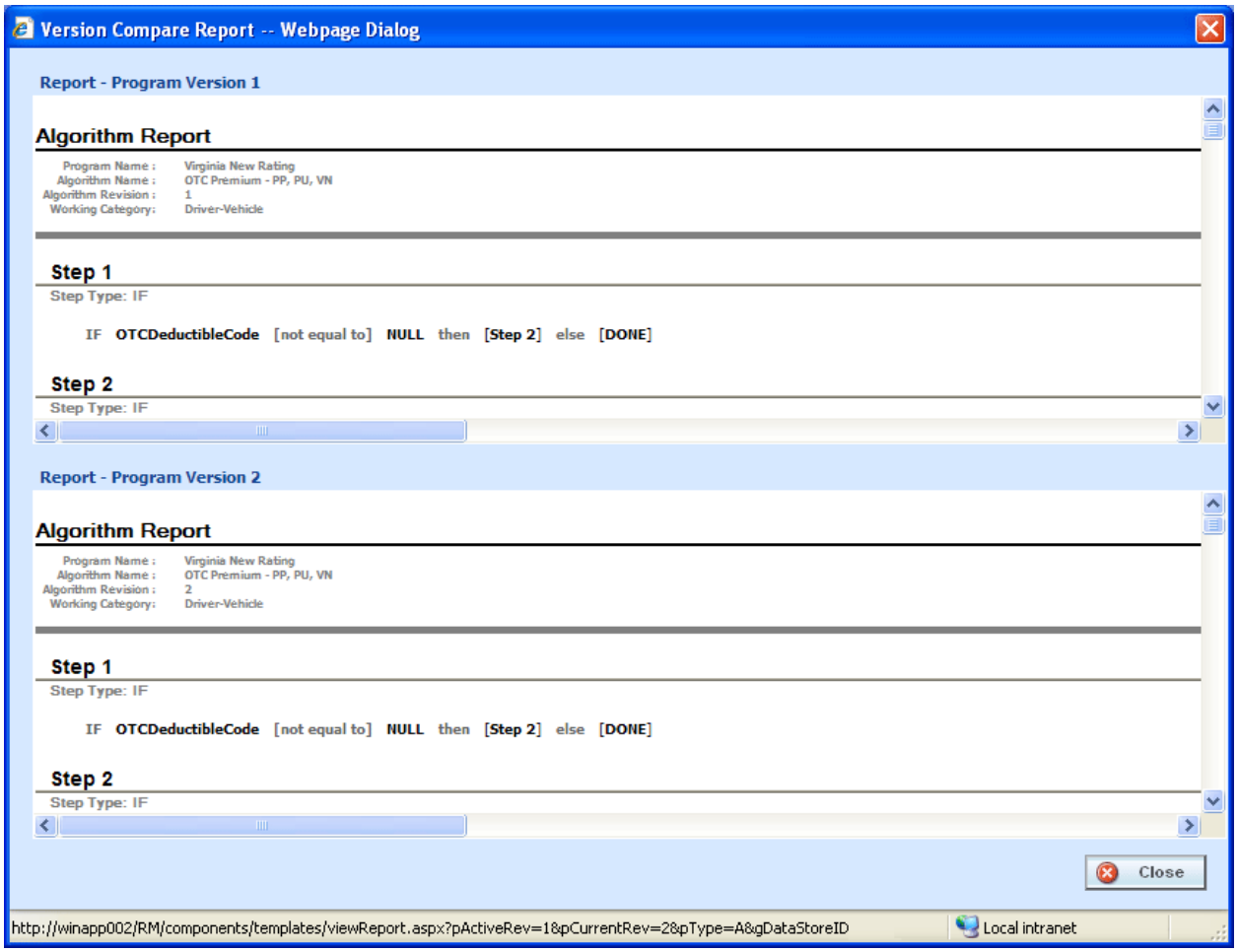



*Figure 132 Version Compare Report*

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

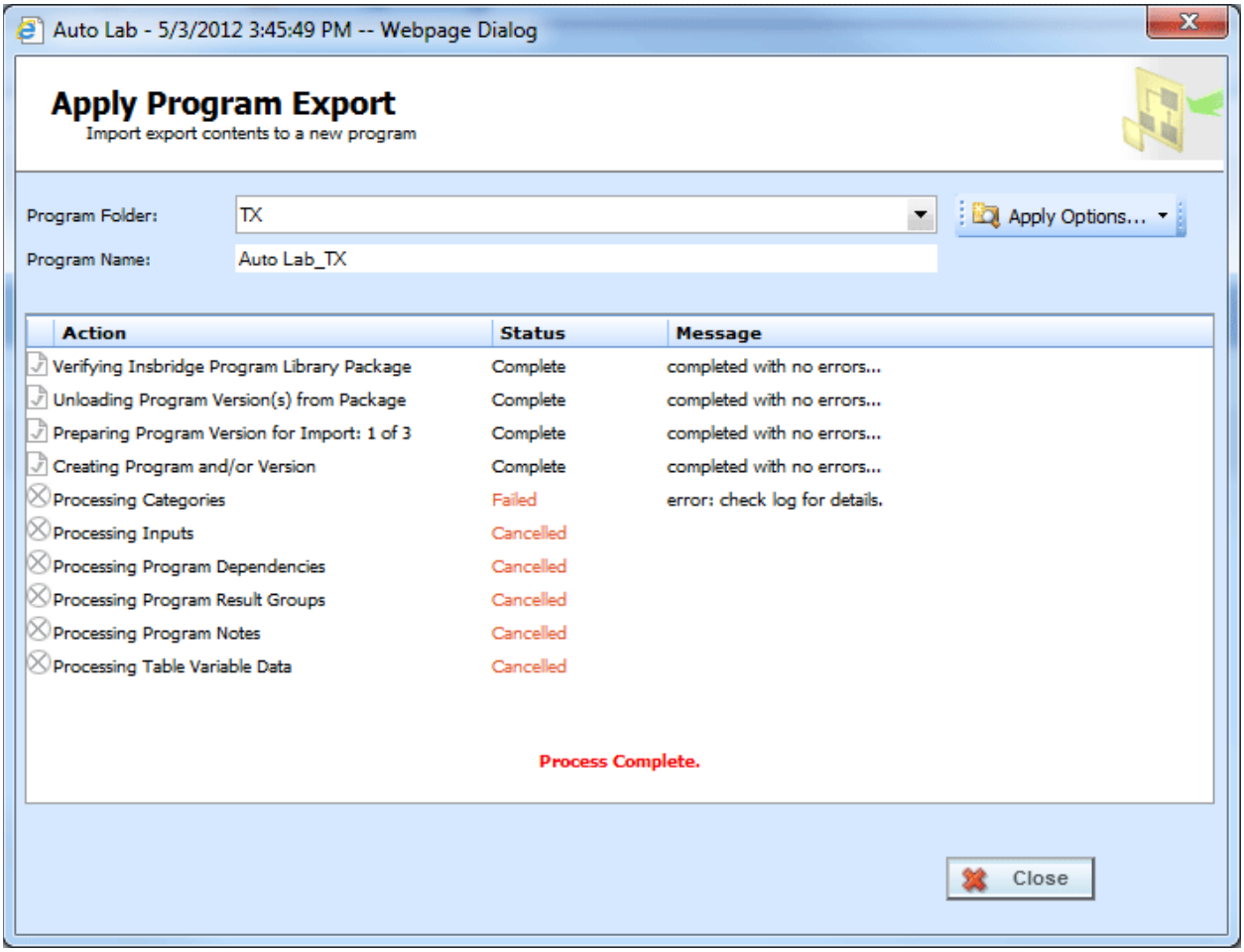



*Figure 133 Failed Template*

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.

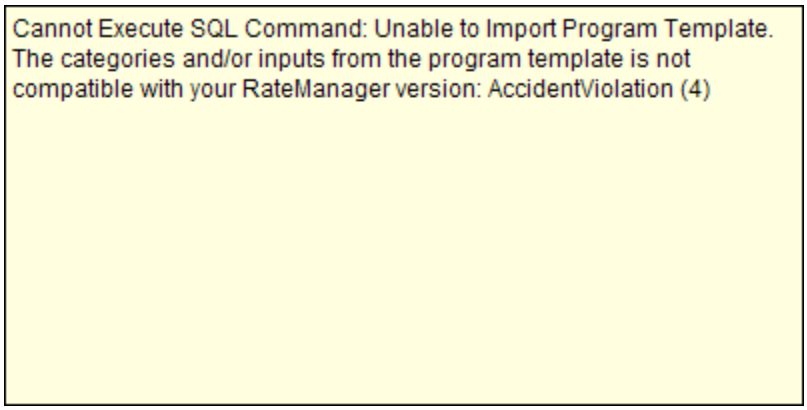



*Figure 134 Failed Template Message*

## Completed Template

When templates are added, the Program Explorer tab will have changes in the left hand side menu, under the line of business where you just added the template to.

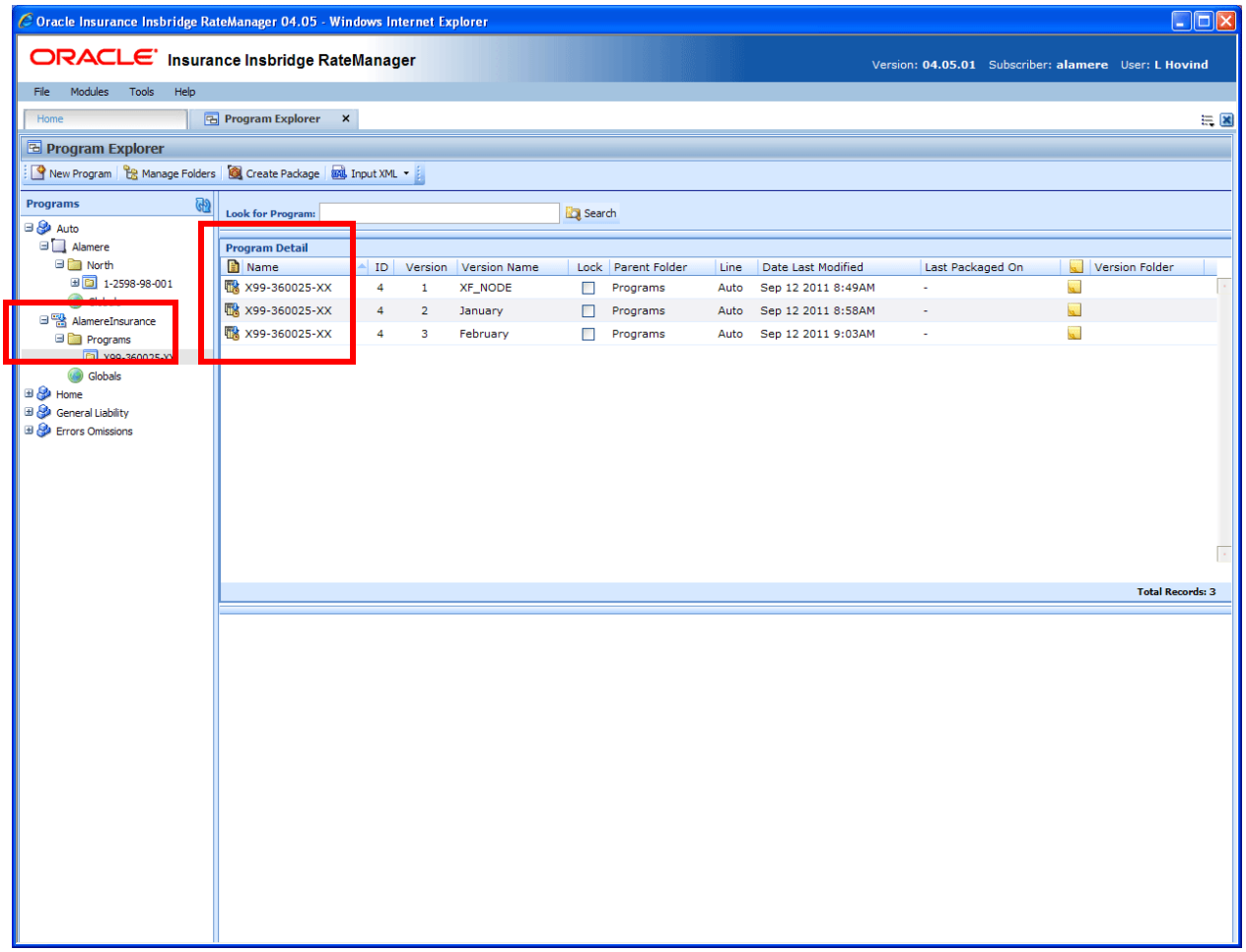



*Figure 135 Applied Templates in Program Explorer*

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.

# WORKING WITH CUSTOM XML FILES

Custom XML files cannot be created on the Library tab. Custom XML files allow you to:

- Edit Custom XML File Details
- Delete a Custom XML File
- Save a Custom XML File to your local computer or network
- Upload a Custom XML File

## Editing a Custom XML File

Custom XML files can be edited at any time.  Custom XML files must be edited one at a time.

1. Click on the **Custom XML file** you want to edit.
2. Click **Edit Detail** to open the Edit Template popup.

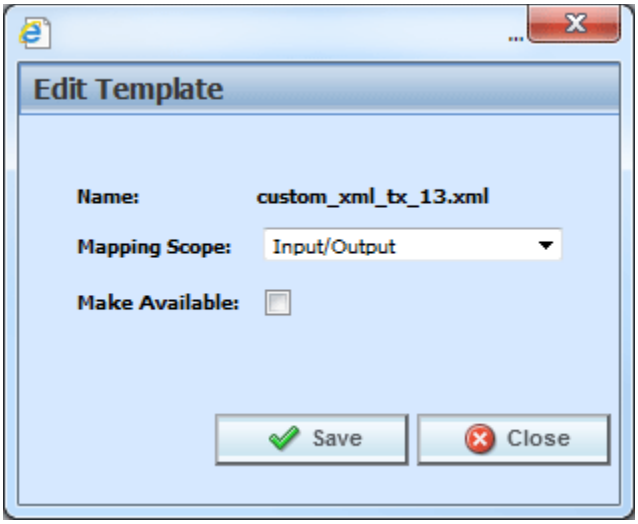



*Figure 136 Editing a Template*

3. You can change the **Mapping Scope** and **Make Available**, which makes the Custom XML file available to user or not.
4. When finished, click **Save** to save your entry and close the popup.

## Deleting a Custom XML File

Custom XML Files can be deleted at any time. Deleting a custom XML file from the library does not remove the file from anywhere it is being used.

1. Click on the **Custom XML File(s)** you want to delete.

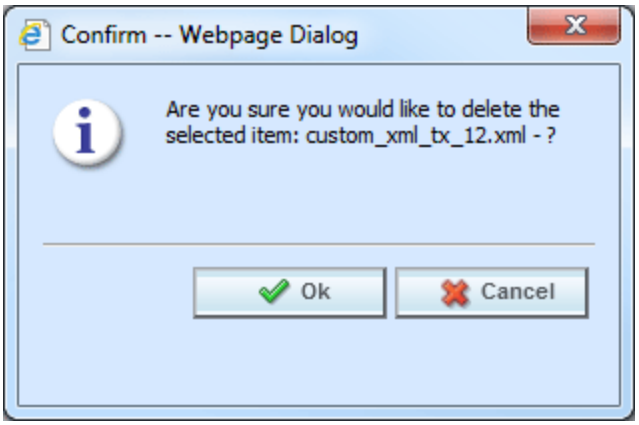



*Figure 137 Deleting a Template*

2. Click **Delete**. A separate screen is displayed. Select **OK** to delete the custom XML file. Click **Cancel** if this not the option you want.

# WORKING WITH PUBLIC XML FILES

- Apply a Public XML File to a New Program
- Edit Public XML Details
- Delete a Public XML
- Save a Template to your local computer or network
- Upload a Template File

## Applying Public XML Programs

Public XML files 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 from Program Explorer and apply the correct program. Program names must be unique.

The Apply Program Export Wizard allows you to apply programs into RateManager. The applied program is placed into the same line of business that the program was created in.

1. Select the **Public XML File** you want to apply.

2. Click **Apply->New Program** to open the Apply Program Export wizard.

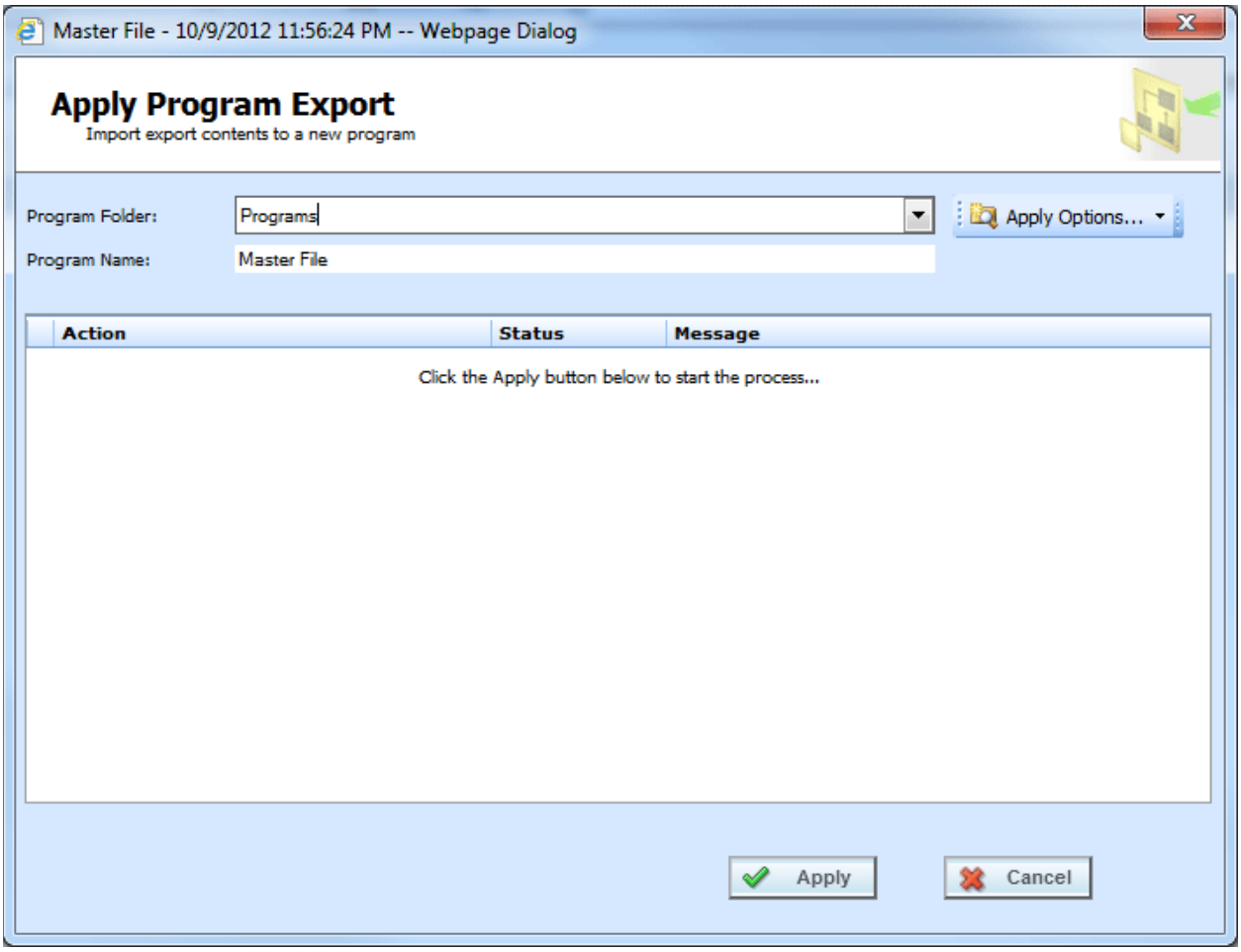



*Figure 138 Apply Public XML Start*

3. Select the **Program Folder** where you want the export to be applied.
4. You can update the **Program Name**.
5. Click **Apply** to start the wizard.
6. The wizard begins. A successful apply displays

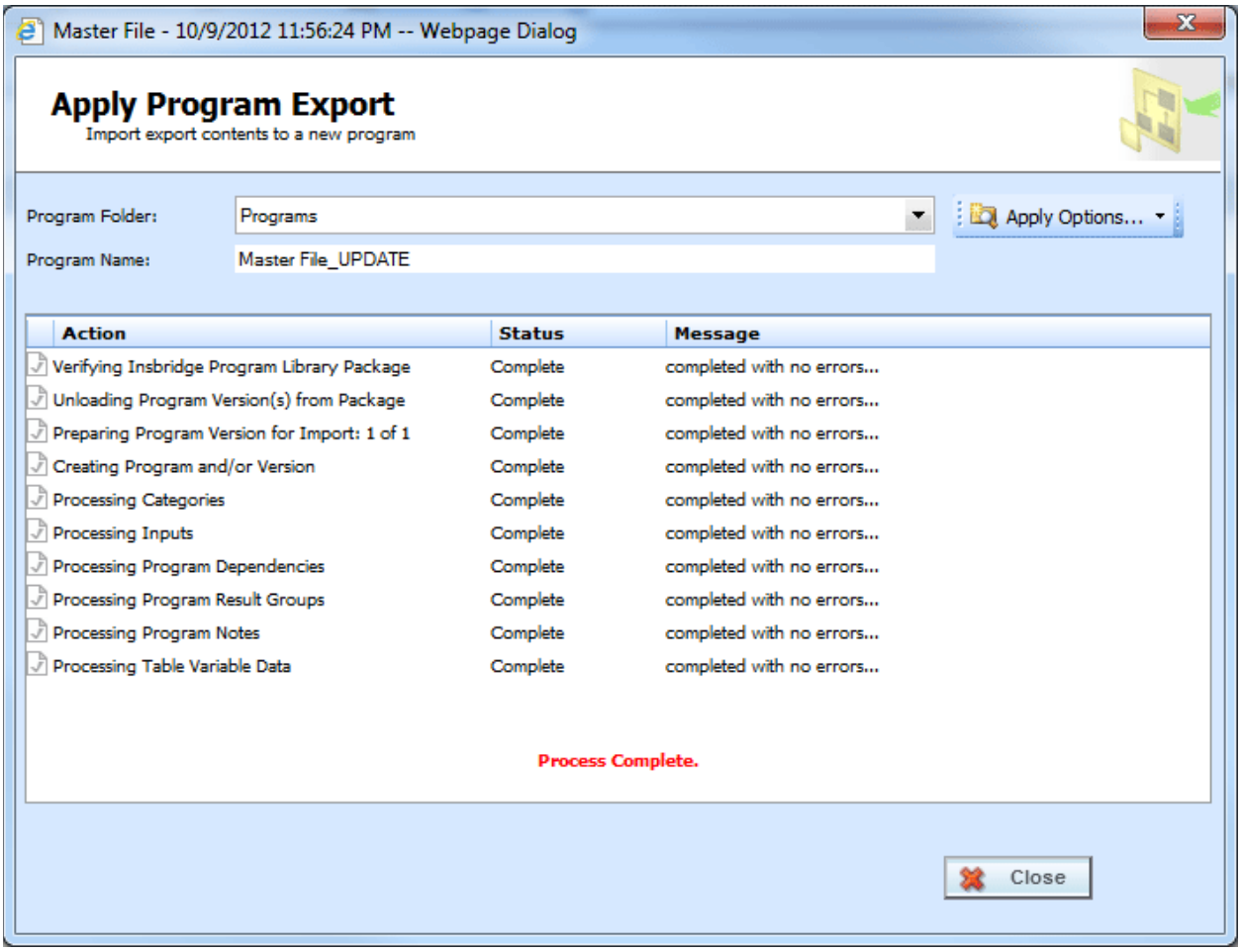



*Figure 139 Apply Export Finish*

If the Apply Program Export fails, a failure message will be displayed on the element that failed. Error logs are in IBFA and may require a system administrator to access.

## Apply Options

If the public XML file line is not activated in the current subscriber's RateManager, the Program Folder 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 applied. If you attempt to apply a non-activated line, an error message will be displayed.

Lines can be activated or created from the Apply Wizard. There are three Apply Options:

- **Manage Lines:** Use this option to active or create a line of business. This option can be used if you receive a *No LOB found* error message when applying an export. You may need the exact spelling of the line or the line number used. Permissions are needed to manage lines.
- **New Subline:** Use this option to create a new subline. A new subline can be created at any time. New sublines allow globals to be unique to the subline. Sublines are created using a name only. Permissions are needed to create sublines.

- **Manage Folders:** Allows you to create a new folder in the selected subline. To create a folder, you must select the subline first. New folders are created using a name only. Permissions are needed to create folders.

These options may be grayed out if you do not have permissions. If you are denied access, please contact your system administrator for permissions.

## Editing a Public XML File

Public XML files can be edited at any time. Public XML must be edited one at a time.

1. Select the **Public XML File** you want to edit.
2. Click **Edit Details** to open the Edit Template popup.

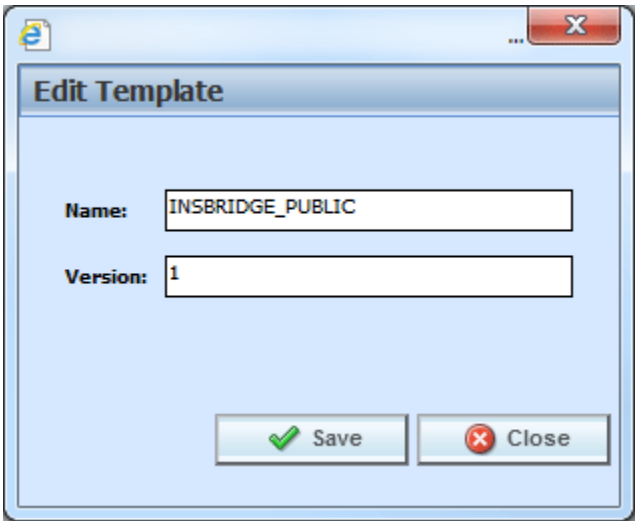



*Figure 140 Editing a Public XML Filet*

3. You can change the **Name** and the **Version**.
4. When finished, click **Save** to save your entry and close the popup.

## Deleting a Public XML File

Public XML files can be deleted at any time. Deleting a public XML file from the library does not remove any applied public XML programs.

1. Select the **Public XML File(s)** you want to delete.

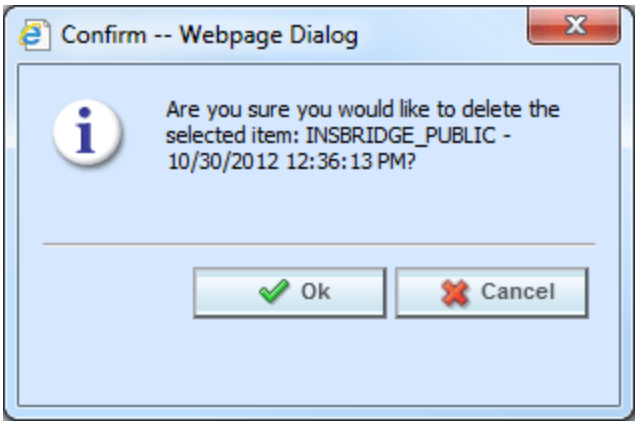



*Figure 141 Deleting a Public XML File*

2. Click **Delete**. A separate screen is displayed. Select **OK** to delete the export. Click **Cancel** if this not the option you want. The export will be removed immediately.

## Updated Files

Files can be re-uploaded in to RateManager only if the original file is deleted from the public XML option on the Library tab or the updated file has a new name. An updated file cannot be applied to an existing program, only to a new program. This means that even though the file is updated, a new program will be created. No new program versions will be created. If you have permissions, you will have the option to create the new program in a new subline.

If the file is applied to the same subline as the earlier file, updates to global elements may not be recognized. If the element ID number is found in the database, the element is not updated or over-written. The element will not be updated, it will be ignored. No new element revisions or program versions will be created.

If the file is applied to a new subline, then the program and elements will be created as expected.

## Notice

For public XML release 4.6.1:

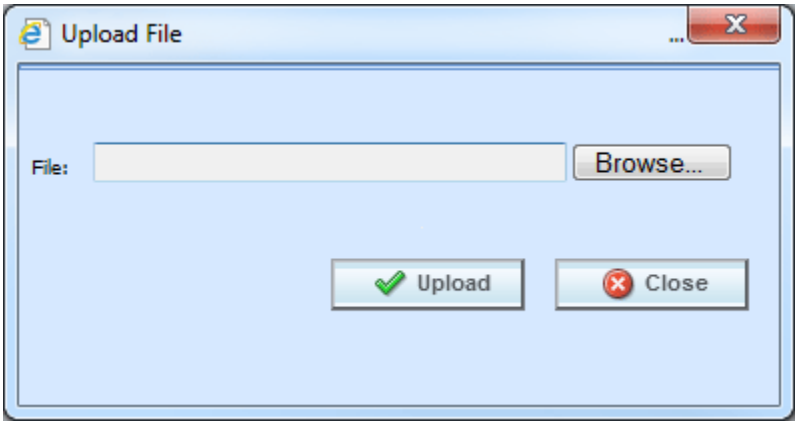
- Linked variables are not supported. Any linked variables will have to be manually entered.
- Driver Assignment is not supported. Any driver assignment will have to be manually entered.
- Ranking step types are not supported. Any ranking steps will have to be manually entered.
- Advanced Option –Algorithm Looping is not supported. Any advanced option-algorithm looping will have to be manually entered.

# UPLOAD FROM FILE

Upload from File allows you to bring a program, template, or file that you have saved on your local drive or network into the library. Files must be uploaded one at a time.

1. Select the option where you want to work. This determines the file type that can be uploaded.

2. Click on **Upload from File**. A separate popup window is displayed.




3. Click **Browse…**, this pulls up your computers dialog box.

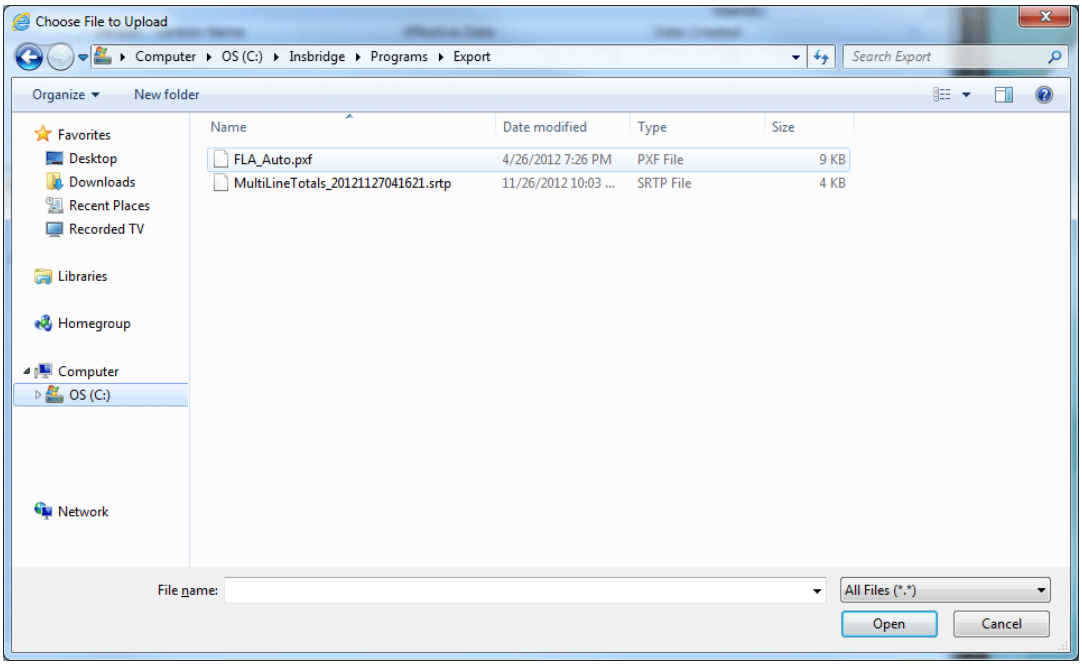



*Figure 142 Selecting a Template File to Download*

4. Find your file and click **Open**. This closes the dialog box and returns you to the previous popup.

5. Click **Upload** to upload the file into your library. If this is not the action you want to take, click **Close**. If the upload is successful, the file will be displayed in the library with the original file name. If the upload fails, an error message will be displayed.

## Allowable File Extensions

- Export files and templates must be .srtp extensions.
- Custom XML files must be .xml extensions.
- Public XML files must be .zip extensions.

## Uploading Templates

Be aware, the template file name that you upload 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 Save to File.

## Uploading Public XML Files

Zip files are the only file type that will be accepted for public XML. The zip file can use any name format. Once uploaded, the name of the file listed on the Library tab is the name of the zip file. This file name can be edited.

File names must be unique across all lines of business and sublines. For example, if a zip file for the AUTO LOB is named ‘oct_2012’ then a zip file for the HOME LOB cannot also be named ‘oct_2012’. Make zip file names unique. The AUTO LOB could be named ‘auto_oct_2012_v1.2’ and the HOME LOB could be named “home_oct_2012_v1.6’. Prior to uploading, make sure the name is unique.

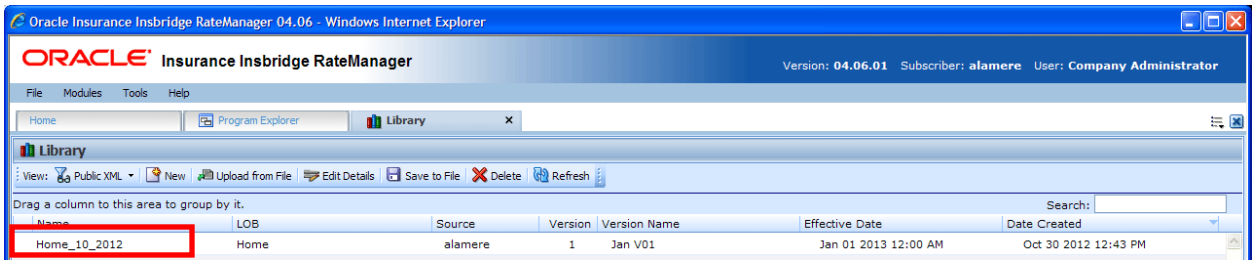



*Figure 143 Public XML Files*

## Changing Views

If you attempt to upload a file type that is not allowed on the view where you are currently located, a message will be displayed. Click **OK** to change to the correct view.

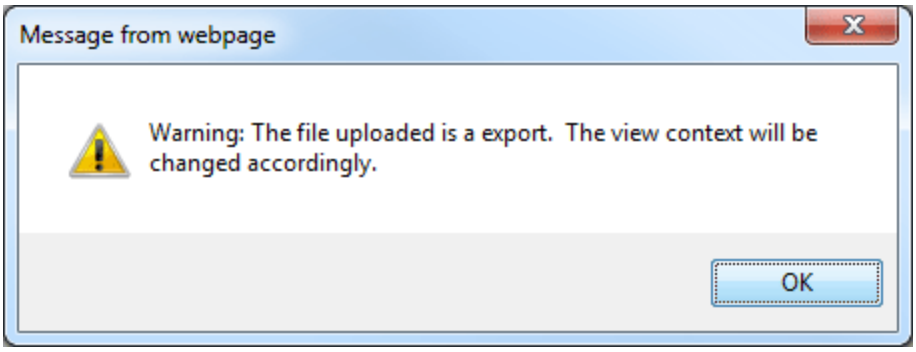



*Figure 144 Change View*

# 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 export, template, custom XML or public XML file you want to save to your local computer or network drive.

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.

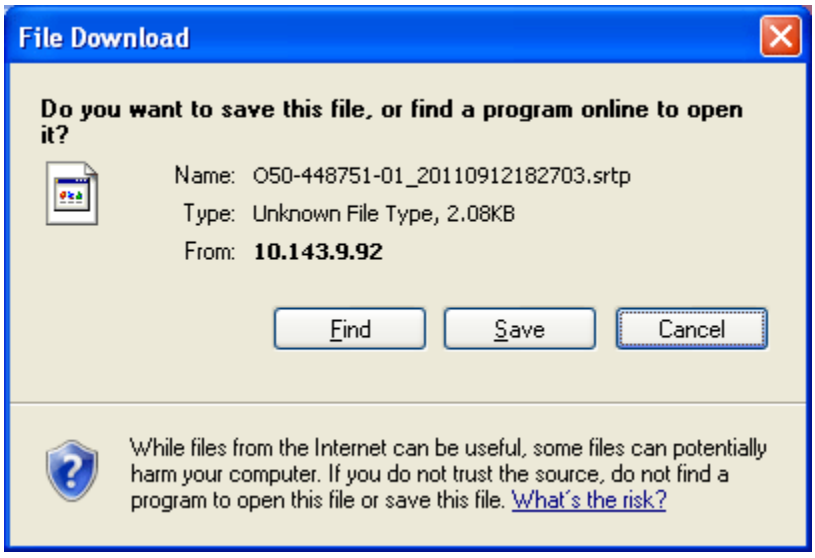



*Figure 145 Saving a File*

3. Your computers dialog box will be displayed. Select the location where you want to save the template. Click **Save**.

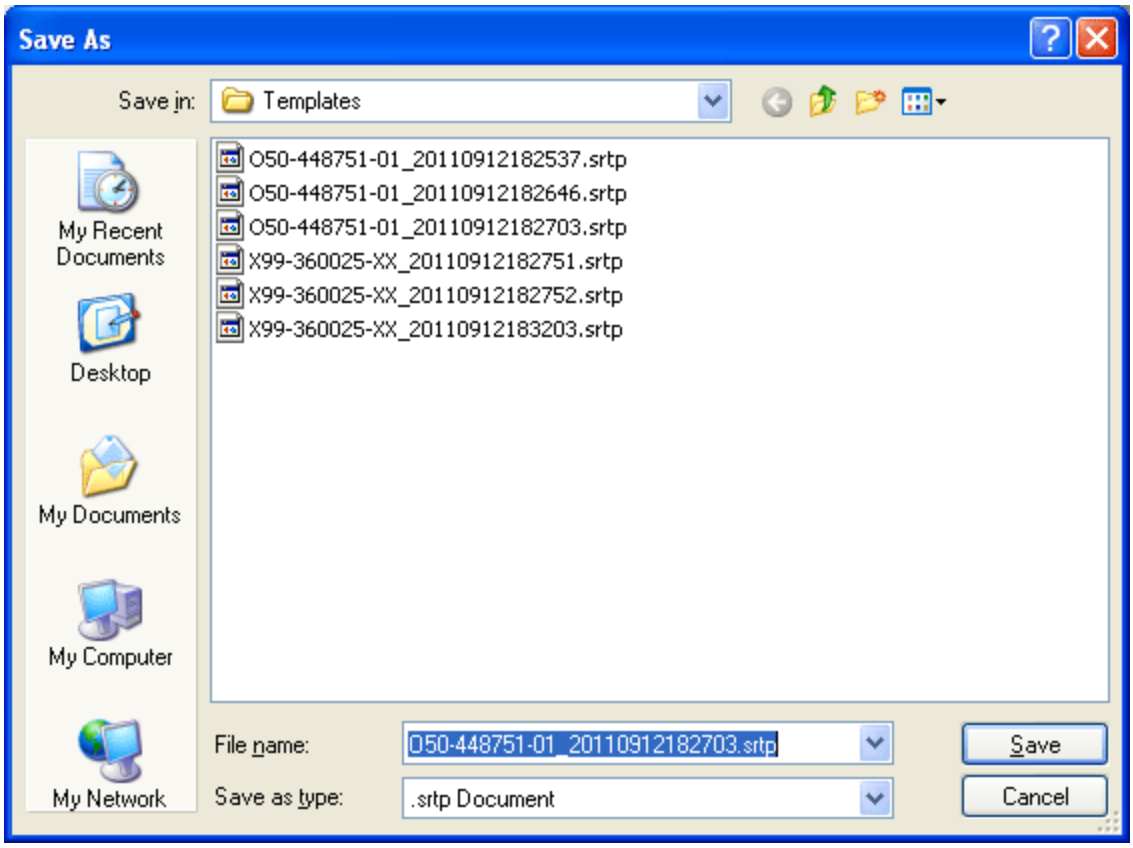



*Figure 146 Selecting a Save Location*

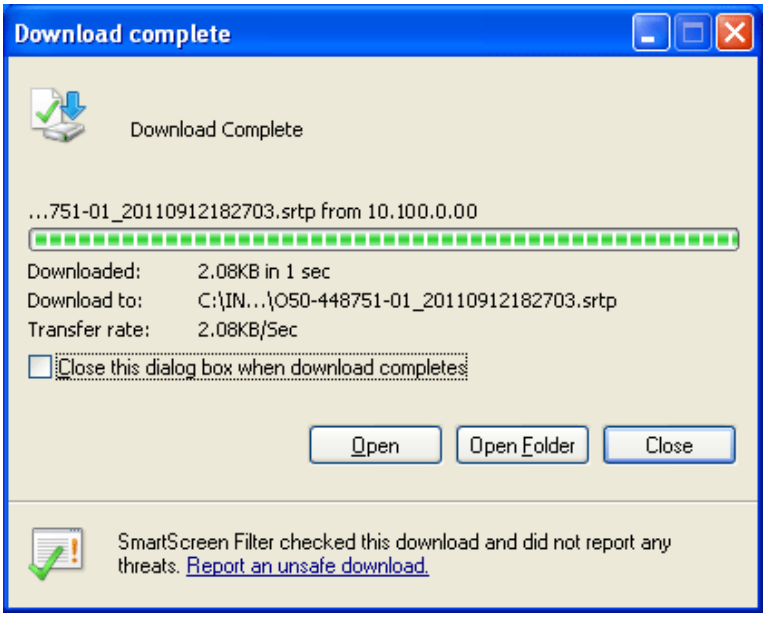



*Figure 147 Download Complete*

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.*

### Saving Templates

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.

### Template Naming Conventions

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)

# CONTACTING SUPPORT

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

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

**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

# 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** | |
| **IBER:** | Insbridge Enterprise Rating System. This is the entire system. |
| **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 IBER 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:** | The previous acronym used by the Insbridge system. The IBRU acronym may still be used in some areas of the system. |
| **If:** | A step type available for use in calculated variables and algorithms. |
| **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. |
| **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. |
| **N** | |
| **Naming Standards:** | A uniform naming structure applied to elements and programs either system wide or per LOB. |
| **Normal Rating Algorithm:** | The most common type of algorithm. Examples of what it can be used for are:<br>• Determine premiums<br>• Calculate differences in limits being passed into the system vs. limits being rated by the system<br>• Assign tiers |
| **O** | |
| **Operator:** | A built-in mathematical function used in calculations and comparisons. |
| **P** | |
| **Package:** | A small file that holds all the RateManager logic for a specific program and version. |
| **Package Location:** | A pointer to a location where SoftRater Packages (SRP's) are stored. |
| **Physical Environment:** | A physical environment is generally referred to as a physical machine. |
| **Program:** | A planned group of procedures executed in a specific order to return a rating. Programs in RateManager typically correspond to rate manuals. Programs can be either created by the users or imported. |
| **Program Date Mask:** | Specifies how SoftRater interprets dates being passed into an input file. |
| **Program Folders:** | A RateManager file management system that functions in much the same way as Microsoft Windows Explorer. This multi-level setup allows for an unlimited number of program folders and subfolders to be placed underneath a subline. |

| R | |
|---|---|
| **Rank Driver Algorithm:** | An algorithm used by a Rank Driver Function to rate drivers based on certain criteria. |
| **Rank Driver Function:** | A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rank Driver Algorithm. |
| **Rank Vehicle Algorithm:** | An algorithm used by a Rank Vehicle Function to rate vehicles based on certain criteria. |
| **Rank Vehicle Function:** | A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rate Vehicle Algorithm. |
| **Rating Environment:** | The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node. |
| **Reconcile:** | A comparison feature that compares one program version against another version in the same program and generate a report of the differences. |
| **Restrictions:** | Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator. |
| **Result:** | 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 IBER 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. |
| **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. |
| **Working Category:** | A classification used to define how elements should run. |
| **Worksheet:** | Rating Worksheet / Premium Calculation Worksheet a document generated for each policy to convey basic information used to establish individual rates and premiums. |
| **X** | |
| **XML ID:** | A number automatically assigned by RateManager to identify inputs and categories. |

# INDEX


## +

+/- Report Flag
  Editing a Scenario, 65

## A

ActiveX
  Error Message Rating Input File, 37
Actual XML Report
  Testing, 24
Add
  MultiLines Programs, 129
Add Programs
  Editing Release, 99
Add Programs Packaging
  Programs Tab, 110
Add Worksheet
  Batch, 44
Add Worksheet Option
  Testing Tab, 13
Add/Remove Report Flag
  Using, 68
Adding
  Filter, 69
  Programs to MultiLines Program Listing Screen, 130
  Programs to Release, 100, 111
Admininstration
  Enforce Release Packaging, 94
Algorithm
  Debug Rating Report, 33
Algorithm Details
  MultiLines Scenario Screen, 136
Algorithms
  Reconcile, 159
All Policy Values
  Amt Diff, 83
  Baseline, 83
  Comparison, 83
  Impact Analysis Scenario Report, 83
  Perc Diff, 83
Amount
  Filtered Policy Details, 85
Amt Diff
  All Policy Values, 83
  Filtered Values, 84
Applying
  Templates in Library, 150
Authoring Environment Definition, 185
Available
  Library Listing, 142
Available Variables
  MultiLines Scenario Screen, 136

## B

Baseline
  All Policy Values, 83
  Filtered Policy Details, 85
  Filtered Values, 84
Baseline File
  Compared to Comparison File, 69, 79
  Overview, 79
  Result, 69
  Results File Listing, 62
Baseline Results
  Editing a Scenario, 62, 65
Baseline to Comparison File
  Example, 79
Batch
  Add Worksheet, 44
  Custom XML Files, 50
  Delete, 44
  Identifier, 51
  Include Debug Report, 44
  Input File Listing, 46
  Menu Bar, 43, 61, 64
  Open Custom XML File, 44
  Open Insbridge XML File, 44
  Options, 13, 14, 44, 57, 62, 65, 104
  Rate Batch File, 44
  Rate New Custom Files, 50
  Refresh, 44
  Result File Listing, 47
  Result Files, Impact Analysis, 72
  Root Name, 51
  Send Confirmation to, 44
  SoftRater Environment Override, 45
  Version Override, 44
  View XML, 48
*Batch File*
  Deleting, 53
  *Network Share*, 39
Batch File Naming Structure, 63
Batch Header
  Input Files, 40
Batch Input File
  Creating, 39
Batch Package Request, 106
Batch Rating
  Overview, 43

Batch Rating Summary Report
Close Window, 81
Print, 81
Results, 81
Results, ID, 81
Results, Item Description, 81
Results, Values, 81
Search, 81
BatchReuslts
New Line, 41
BL
Editing a Scenario, 62
Browse
Category, 134
Browser
Compatibility, xi

## C

Calculated Variables
Shown on Debug Rating Report, 33
*Callouts*
*In MultiLines Programs*, 130
Categories
Sorting by Column Header, 120
Category
Browsing for, 134
Input Variable Listing in MultiLines, 120
Change Step Order
MultiLines, 136
Chart Flag
Editing a Scenario, 65
Check Box
Batch, 46
Impact Analysis, 59
Result File Listing, 47
Checkbox
Testing Tab, 15, 16
Choosing
Results, 64
Close Window
Batch Rating Summary Report, 81
CMP
Editing a Scenario, 62
Comparison
All Policy Values, 83
Filtered Policy Details, 85
Filtered Values, 84
Comparison File
Compared Against Baseline File, 69, 79
Overview, 79
Result, 69
Results File Listing, 62
Comparison Results
Editing a Scenario, 62, 65
Confirmation Screen
Reconcile, 162
Constants
MultiLines Scenario Screen, 136
Copy
MultiLines Elements, 126
MultiLines Mapping, 132
Right Click Menu MultiLines Input Variables, 121
Copying
Input and Result Files in Testing, 17
MultiLines Elements, 127
Releases, 96
Result Groups in MultiLines, 134
Copying Files
Testing, 20
Create Package
MultiLines, 126
MultiLines Scenario Screen, 136
Create Packages
Editing Release, 99
Creating
Batch Input File, 40
Full Package, 108, 113, 114
Local Package, 108, 113, 114
MultiLines Elements, 126
New MultiLines Input Variables, 121
New Packaging Job, 105
New Release, 95
New Scenario, 72
New Template, 148
Program Packages within Release, 101
Creation Date
Impact Analysis, 59
*Custom XML Files*
Batch, 50
*Testing*, 23, 28

## D

Data Analysis Tool
Impact Analysis, 38
PricingManager, 56
Data Type
MultiLines, 133
Date Created
Library Listing, 142
Date Last Modified
Input Variable Listing in MultiLines, 120
Library Listing, 142
Date Modified
Testing Tab, 15
Date Run
Testing Tab, 16
Debug
Result File, Batch, 47
Standard Rating Summary Report Results, 31
Testing Tab, 16
Viewing Testing, 18
Debug Options
Testing Tab, 13

Debug Rating Report
Algorithm, 33
Calculated Variable, 33
Debug Test Case Editor
Find Next, Navigation Bar, 77
Find Previous, Navigation Bar, 78
Find, Navigation Bar, 77
Navigation Bar, 77
View, Navigation Bar, 77
Decimal Precision
MultiLines Scenario Screen, 136
Default
Sublines, 120
Define
Reports, 64
Delete
Batch, 44
Batch File, 53
Impact Analysis, 57
Library Listing, 141
MultiLines, 133
MultiLines Elements, 126
MultiLines Input Variables, 119
MultiLines Mapping, 132
Packaging Job, 109
Packaging Packaging Jobs Screen, 104
Releases
Delete, 93
Right Click Menu MultiLines Input Variables, 121
Scenario Report, 75
Testing Tab, 13
Delete Step
MultiLines Scenario Screen, 136
Delete Term
MultiLines Scenario Screen, 136
Deleteing
Release, 97
Deleting
MultiLines Elements, 128
MultiLines Input Variables, 123
Result Groups from MultiLines, 134
Templates, 148, 156, 166, 170
Deleting Files
Testing, 21
Deleting Result Files
Testing, 36
Deploy
Release, 97
Release Environment, 95
Releases, 93
Deployed
Releases, 93, 99
Deployment Notes
Global Versioning Package, 108, 113, 114
Description
MultiLines, 133
MultiLines Program Listing Screen, 129
Difference
Filtered Policy Details, 85
Download
Library Listing, 141
Templates, 172

## E

Edit
Library Listing, 141
MultiLines Elements, 126
MultiLines Mapping, 132
Right Click Menu MultiLines Input Variables, 120
Edit Content
Releases, 93, 96, 104
Edit Filter, 69
Editing a Scenario, 65
Edit Group Options, 133
Edit Job Options, 106
Edit MultiLines Result Group, 133
Edit Pack Options
Packaging Job, 107, 113
Packaging Programs Tab, 110
Edit Release Options
Releases, 93
Edit Scenario Tab, 60, 72, 73
Editing
Content Releases, 98, 109
File Name Templates, 176
Filter, 69
MultiLines Elements, 127
MultiLines Input Variables, 122, 123
MultiLines, Scenario, 136
Pack Options Override, 114
Packaging Job, 106
Releases, 96
Result Groups in MultiLines, 133, 134
Scenario, 73
Scenario, Step 2, 64
Templates, 147, 156, 166, 170
Test Program in Testing, 17
Editing a Scenario
+/- Report Flag, 65
Baseline Results, 62, 65
BL, 62
Chart Flag, 65
Choosing Baseline File, 62
Choosing Comparison File, 62
CMP, 62
Comparison Results, 62, 65
Edit Filter, 65
Last Date Modified, 63
Line of Bus, 66
Parent ID, 66
Policeis/Quotes, 63
Program ID, 66
Program Information, 65
Program Name, 65
Remove Filter, 65

Results, 66
Results File, 63
Results File Listing, 62
Scenario Name, 62, 65
Time Stamp, 63
Version Override, 62
Editing Files
Testing, 20
Editing Release
Add Programs, 99
Create Packages, 99
Refresh, 99
Remove Programs, 99
Edition Notice, 2
Effective Date
Library Listing, 142
Element Revisions
Creating, 171
Enforce Release Packaging
Admin, 94
Environment
Deploy Releases, 95
Package Screen Options, 113
*Error Message*
*Creating New MultiLines Result Group*, 132
Errors
Message for Batch, 49, 54
Message for Scenario, 73
Rating Input File, 37
Example
Baseline to Comparison File, 79
Report Filter, 68
Report Flag, 67
XML Input File, 40
Executing
Packaging Result File Listing, 104
Release Content Listing, 111
Executing Custom Output Mapping
Testing, 18
Existing Program
Templates in Library, 150, 154
Export
Impact Analysis, 57
Exporting
Program Version, 139

## F

Failed
Templates, 153, 155
File
Baseline to Comparison, 69, 79
File Name
Testing Tab, 15, 16
File Names
Templates, 176
File Rated
Viewing, 81
*Files*
Listed Results for Impact Analysis, 66
*Re-locating for a Batch*, 51
Selecting Result Impact Analysis, 60, 61
Files Names
Impact Analysis, 63
Filter
Adding, 69
Editing, 69
Set, 66
*Using Multiple*, 71
Filter Definitions
Impact Analysis Scenario Report, 84
Filter Options, 69
Filter Policy Details
Impact Analysis Scenario Report, 85
Filtered Policy Details, 67, 68, 79
Amount, 85
Baseline, 85
Comparison, 85
Difference, 85
Perc, 85
Policy List, 85
Policy Number, 85
Result Name, 85
Result Value, 85
Filtered Values
Amt Diff, 84
Baseline, 84
Comparison, 84
Impact Analysis Scenario Report, 83
Perc Diff, 84
Filters
Numeric Operators, 70
Values, 70
Where base value is, 69
Where comp value is, 69
Where the diff is, 69
Where the value is, 69
Find
Batch Rating Summary Report, 81
Navigation Bar Debug Test Case Editor, 77
Navigation Bar Testing, 27
Find Next
Navigation Bar Debug Test Case Editor, 77
Find Previous
Navigation Bar Debug Test Case Editor, 78
Flagged Results
Statistics on Selected Results, 83
Folder
Input Variable Listing in MultiLines, 120
MultiLines Program Listing Screen, 130
From Cache
Viewing, 81
Full

Publish Type, 108, 113, 114
Full Package, 108, 113, 114
Environment, 108, 113, 114
Functions
MultiLines Scenario Screen, 136

## G

Global Versioning Package
Deployment Notes, 108, 113, 114
Publish Type, 108, 113, 114
Globals
Values in Sublines, 138
Globe Icon, 129
Group Batch Input File
Used in Impact Analysis, 40
Group Name
MultiLines Mapping Listing, 132

## I

IBER Definition, 186
IBFA Definition, 186
IBRU Definition, 186
IBSS Definition, 186
ID
Batch Rating Summary Report Results, 81
MultiLines Elements Listing Screen, 126
Standard Rating Summary Report Results, 30
Identifier
Batch, 51
Testing, 23
Impact Analysis
All Policy Values, Scenario Report, 83
Check Box, 59
Creating New Scenario, 72
Creation Date, 59
Delete, 57
Editing New Scenario, 73
Export, 57
Filter Definitions, Scenario Report, 84
Filter Policy Details, Scenario Report, 85
Filtered Values, Scenario Report, 83
Flagging Result, 67
Navigating, 42
New Scenario, 57
Overview, 38
Refresh, 57
Report Filter, 68
Report Flag, 67, 68
Report Size, 59
Result Name, Scenario Report, 83, 84
Run Scenario, 57
Scenario Administrator, 59
Scenario Listing, 58
Scenario Reports, 59
Scenario Reports Listing, 59
Step 1 – Select Results, 61
Step 2 – Define Report, 64
Viewing a Report, 82
Impact Analysis Input Files, 38
Impact Analysis Report
Result Mapping, 41
Import Wizard, 145, 167
Imported
Templates, 140
Include Debug Report
Batch, 44
Testing Tab Option, 13
Individual Batch Input File
Used in Impact Analysis, 40
Input
Creating New on MultiLines Input Variables Screen, 121
Deleting on MultiLines Input Variables Screen, 123
Editing on MultiLines Input Variables Screen, 122, 123
Viewing MultiLines Input XML, 124
Input Category
MultiLines, 134
Input Description
MultiLines, 134
Input File
ActiveX Error Message Rating, 37
Batch Header, 40
*Deleting Batch*, 44
Errors when Rating, 37
Rating, 18
Testing Tab, 15
Input File Listing
Batch, 46
Check Box, 46
Last Date Used, 46
XML Input File, 46
Input Files
From Impact Analysis, 38
Preparing, 39
Input Variable Listing
Category MultiLines Inputs, 120
Date Last Modified MultiLines Inputs, 120
Folder in MultiLines Inputs, 120
Name MultiLines Inputs, 120
Notes MultiLines Inputs, 120
Type MultiLines Inputs, 120
*Insbridge Document Viewer*
*Saving*, 87
Item Description
Batch Rating Summary Report Results, 81
Standard Rating Summary Report Results, 30

## J

Job Duration
Scenario Summary, 83

## L

Last Date Modified
Editing a Scenario, 63
Last Date Used
Batch, 46
Last Deploy Date
Releases Listing, 93
Last Packaged On
MultiLines Elements Listing Screen, 126
Last Rate Date
Batch, 47
Last Run Date
Packaging Result File Listing, 104
Last Updated
MultiLines Mapping Listing, 132
Library, 137
Applying Templates, 150
Menu Bar, 141
Navigating, 138
Rules, 137
Library Listing
Available, 142
Date Created, 142
Date Last Modified, 142
Delete, 141
Download, 141
Edit, 141
Effective Date, 142
LOB, 142
Name, 142
Name, Custom XML, 142
New, 141
Refresh, 141
Scope, 142
Source, 142
Source Ver, 142
Version Name, 142
Library Listing Screen, 138
Line
Release Content Listing, 99, 111
Line of Bus
Editing a Scenario, 66
Standard Rating Summary Report, 28
Viewing, 80
Listing
Results for Impact Analysis, 66
Listing Screen
Library, 138
LOB
Library Listing, 142
Local
Publish Type, 108, 113, 114
Local Package, 108, 113, 114
Lock
Releases, 93, 99
Locking
Releases, 96, 100
Logical Environment Definition, 187
Look For
MultiLines Input Variables, 120

## M

Mapping
MultiLines Elements, 131
Menu Bar
Batch, 43, 61, 64
Library, 141
MultiLines, 119, 126
Releases, 27, 93, 98, 104, 110
Reporting, 57
Testing Tab, 13
Multiline
Overview, 116
MultiLines
Changing Step Order, 136
Create Package, 126
Data Type, 133
Decimal Precision, 136
Delete, 133
Deleting a Result Group, 134
Description, 133
Input Category, 134
Input Description, 134
Menu Bar, 119, 126
MultiLines, 125
Navigating, 116
Overview, 125
Result Groups Tab, 133
Save Mapping, 133
Show Listing For, 133
Source Program Results, 133
Type, 134
MultiLines Elements
Copying, 127
Creating, 126
Deleting, 128
Editing, 127
ID, 126
Last Packaged On, 126
Mapping, 131
MultiLines Listing, 126
Program, 126
MultiLines Input Variables
Copy on Right Click Menu, 121
Creating New, 121
Delete, 119
Delete on Right Click Menu, 121
Deleting, 123
Edit on Right Click Menu, 120
Editing, 122, 123
Look For, 120
MultiLines Inputs XML, 119
MultiLines XML, 124
New, 119
Notes, 119

Notes on Right Click Menu, 121
Right Click Menu, 120
Search, 120
MultiLines Input XML
Viewing, 124
MultiLines Inputs XML
MultiLines, 126
MultiLines Input Variables, 124
MultiLines Input Variables, 119
MultiLines Listing
MultiLines Elements, 126
*MultiLines Mapping*
Adding Result Group, 132
Copy, 132
Delete, 132
Edit, 132
Editing Result Group, 133
Editing Result Group Options, 133
Group Name, 132
Last Updated, 132
Listing, 132
Navigating, 132
Navigation Bar, 132
New Group, 132
*No Programs Displayed*, 131, 133
Result Code, 132
Result Group, 132
Source Program, 132
Target Program, 132
MultiLines Program Listing Screen
Adding Programs, 130
Description, 129
Folder, 130
Release Date, 130
Removing Programs, 130
Viewing Program Versions, 130
MultiLines Programs
Addr, 129
*Invoking Callouts*, 130
Navigation Bar, 129
Program Listing, 129
Remove, 129
Right Click Menu, 131
MultiLines Scenario Creates
Create Package, 136
MultiLines Scenario Screen
Algorithm Details, 136
Available Variables, 136
Constants, 136
Decimal Precision, 136
Delete Step, 136
Delete Term, 136
Functions, 136
New Step, 136
Save, 136
Steps, 136
MultiLines Scenarios, 135

## N

Name
Input Variable Listing in MultiLines, 120
Library Listing, 142
Packaging Result File Listing, 104
Releases Listing, 93
Name, Custom XML
Library Listing, 142
Naming
Scenario for Impact Analysis, 61
Naming Files
Templates, 173, 176
Navigating
Impact Analysis, 42
Library, 138
MultiLines, 116
MultiLines Mapping, 132
MultiLines Programs, 129
MultiLines, Scenario, 135
Packaging in Packaging, 103
RateManager, xi
Releases, 89
Testing Tab, 12
Navigation Bar
Debug Test Case Editor, 77
MultiLines Mapping, 132
MultiLines Programs, 129
MultiLines, Scenario, 136
*Network Share*
*Batch Files*, 39
New
Library Listing, 141
MultiLines Elements, 126
MultiLines Input Variables, 119
Packaging Packaging Jobs Screen, 104
Releases, 93
New Group
MultiLines Mapping, 132
New Job
Creating in Packaging, 105
New Program
Templates in Library, 150, 151
New Release
Creating, 95
New Scenario
Impact Analysis, 57
New Step
MultiLines Scenario Screen, 136
Next
Navigation Bar Testing, 27
Notes
Input Variable Listing in MultiLines, 120
MultiLines Input Variables, 119
Right Click Menu MultiLines Input Variables, 121
Number of Results Filtered
Scenario Summary, 83

Number of Results Processed
Scenario Summary, 83

## O

Op Column, 70
Open Batch File
Custom XML, 44
Insbridge XML, 44
Open/Rate New Custom Files
Testing, 22
Opening
Step 2 of Editing a Scenario, 61
Operators, 70
Options
Batch, 13, 14, 44, 57, 62, 65, 104
Package, 107, 112
Send Confirmation to, 104
Original Results
Editing a Scenario, 62, 65
Output Files Filter Option
Testing Tab, 14
Override
Editing Pack Options, 114
Override Pack Options
Packaging Result File Listing, 104
Overview
Baseline to Comparison File, 79
Batch Rating, 43
Impact Analysis, 38
Multiline, 116
MultiLines, 125
Reconcile, 157
Releases, 88, 92, 103
Standard Rating Summary Report, 26, 62, 76, 79
Testing, 12

## P

Package
Creating Full, 108, 113, 114
Creating Local, 108, 113, 114
Creating within Release, 101
Environment, 113
Full, 108, 113, 114
Local, 108, 113, 114
Options, 107, 112
Screen Options, 108, 113, 114
Package Date
Standard Rating Summary Report, 29
Viewing, 81
Package Location Definition, 187
Packaging
Navigating to Packaging, 103
Result File Listing, 104
Packaging Job
Creating New, 105
Deleting, 109
Edit Pack Options, 107, 113
Editing in Packaging, 106
Starting, 106
Stopping, 108
Packaging Packaging Jobs Screen
Delete, 104
New, 104
Refresh, 104
Start, 104
Stop, 104
Packaging Programs Tab
Add Programs, 110
Edit Pack Options, 110
Refresh, 110
Remove Programs, 110
Parent ID
Editing a Scenario, 66
Standard Rating Summary Report, 29
Viewing, 81
PASS
Rate Status, 29
Perc
Filtered Policy Details, 85
Perc Diff
All Policy Values, 83
Filtered Values, 84
Physical Environment Definition, 187
Policies
Testing Tab, 16
Policies/Quotes
Batch, 47
Editing a Scenario, 63
Policy List
Filtered Policy Details, 85
Policy Number
Filtered Policy Details, 85
Preparing Input Files, 39
Previous
Navigation Bar Testing, 27
Print
Batch Rating Summary Report, 81
Private View
Testing Tab, 14
ProgID
Release Content Listing, 99, 111
Program
Exporting Version, 139
MultiLines Elements Listing Screen, 126
Releases Listing, 93
Removing Release, 101, 112
Testing Rating Programs, 12
*Undoing a Version Deletion*, 139
Version for Impact Analysis Reports, 39
Program Desc
Release Content Listing, 99, 111
Program ID
Editing a Scenario, 66

Standard Rating Summary Report, 29
Viewing a Scenario, 81
Program Information
Editing a Scenario, 65
Viewing, 80
Program Inputs XML
MultiLines Programs Right Click Menu, 131
Program Listing
MultiLines Programs, 129
Program Listing Screen
Exporting a Program Version, 139
Program Name
Editing a Scenario, 65
Standard Rating Summary Report, 28
Viewing, 80
Program Version
Standard Rating Summary Report, 28
Viewing, 80
Program Versions
Reconcile, 157
Programs
Adding to Release, 100, 111
Navigating to MultiLines, 129
*Not Displayed on MultiLines Mapping*, 131, 133
Packaging Result File Listing, 104
Templates, 140
ProgVer
Release Content Listing, 99, 111
Public View
Testing Tab, 14
Publish Type
Full, 108, 113, 114
Global Versioning Package, 108, 113, 114
Local, 108, 113, 114

## R

Rate Administrator
Batch, 47
Rate Batch File
Batch, 44
Rate Environment
Standard Rating Summary Report, 29
Viewing, 81
Rate Location
Viewing, 81
Rate New Custom Files
Batch, 50
Rate Status
PASS, 29
Standard Rating Summary Report, 29
Stop, 29
Viewing, 81
RateManager
Navigating, xi
Rating
Input File, 18
Multiple XML Files, 39, 43
Rating Environment Definition, 188
Rating Report
Testing, 24
Reconcile, 157
Algorithms, 159
Confirmation Screen, 162
Rejecting Changes, 159
Selecting the Version, 158
Variables, 161
Viewing Reports, 163
Refresh
Batch, 44
Editing Release, 99
Impact Analysis, 57
Library Listing, 141
Packaging Packaging Jobs Screen, 104
Packaging Programs Tab, 110
Releases, 93
Testing Tab, 13
Rejecting Changes
Reconcile, 159
Release
Adding Programs, 100, 111
Creating New, 95
Creating Packages, 101
Deleting, 97
Deploying, 97
Editing, 96
Editing Content, 98, 109
Removing Programs, 101, 112
Supported, 95
System Notifications, 95
Release Content Listing
Executing, 111
Line, 99, 111
ProgID, 99, 111
Program Desc, 99, 111
ProgVer, 99, 111
Status, 99
Release Date
MultiLines Program Listing Screen, 130
Releases
Copying, 96
Delete, 93
Deploy, 93
Deployed Icon, 93, 99
Edit Content, 93, 104
Edit Release Options, 93
Environment to Deploy, 95
Lock Icon, 93, 99
Locking, 96, 100
Menu Bar, 27, 93, 98, 104, 110
Navigating, 89
New, 93
Overview, 88, 92, 103
Refresh, 93
Releases Listing
Last Deploy Date, 93

Name, 93
Program, 93
Status, 93

Releases Security, 91

Remove
MultiLines Programs, 129
MultiLines Programs Right Click Menu, 131

Remove Filter
Editing a Scenario, 65

Remove Program, 101, 112

Remove Programs
Editing Release, 99
Packaging Programs Tab, 110

Removing
Programs to MultiLines Program Listing Screen, 130

Rename
Scenario Report, 74

Renaming
Input and Result Files in Testing, 17

Renaming Files
Testing, 20

Report
All Policy Values, Impact Analysis, 83
Filter Definitions, Impact Analysis, 84
Filter Policy Details, Impact Analysis, 85
Filtered Values, Impact Analysis, 83
Result Name, Impact Analysis, 83, 84
Viewing Impact Analysis, 82

Report Filter, 68
Example, 68

Report Flag, 66, 67, 68
Example, 67

Report Size
Impact Analysis, 59

Reporting
Menu Bar, 57

Reports
Define, 64
Filters in Impact Analysis, 69
Impact Analysis Preerquisites, 39
Impact Analysis Report Rules, 39
Impact Analysis, Start and Stop Times, 66
Prerequisites, Impact Analysis, 39
Scenario Listing Impact Analysis, 59
Scenario Listing Time Stamp, 59
Scenario Summary, 83
Testing, 24

Result
Baseline to Comparison File, 69
Flagging, 67
Report Flag, 67, 68
Un-Flagging, 67

Result Code
MultiLines Mapping Listing, 132

Result File
Viewing, 81

Result File Information
Testing, 28

Result File Listing
Batch, 47
Check Box, 47
Debug, 47
Executing, 104
Last Rate Date, 47
Last Run Date, 104
Name, 104
Override Pack Options, 104
Packaging, 104
Policies/Quotes, 47
Programs, 104
Rate Administrator, 47
Scenario Name, 47
Size, 48

Result Files
Batch, Impact Analysis, 72
New Line Breaks, 41
Selecting for Impact Analysis, 60, 61
Testing Tab, 16

Result Group
Adding to MultiLines Mapping Listing, 132
Editing in MultiLines Mapping Listing, 133
MultiLines Mapping Listing, 132

Result Group Options, 133
Editing in MultiLines Mapping Listing, 133

Result Groups
Copying in MultiLines, 134
Deleting from MultiLines, 134
Editing in MultiLines, 134

Result Groups Tab
MultiLines, 133

Result Mapping
Requirements for Impact Analysis Reports, 41

Result Name
Filter Policy Details, 85
Impact Analysis Scenario Report, 83, 84

Result Value
Filtered Policy Details, 85

Results
Batch Rating Summary Report, 81
Choosing, 64
Editing a Scenario, 66
On Impact Analysis Report, 64
Standard Rating Summary Report, 30

Results File
Editing a Scenario, 63

Results File Listing
Editing a Scenario, 62

Right Click
View Where Used on Global Variable Listing, 121

Right Click Menu
MultiLines Input Variables, 120
MultiLines Programs, 131
Program Inputs XML on MultiLines Programs, 131
Remove MultiLines Programs, 131

Testing, 17
RM Definition, 188
Root Name
Batch, 51
Rules
File Name Templates, 176
Library, 137
Templates, 140, 150
Run By
Testing Tab, 16
Run Scenario
Impact Analysis, 57, 58
Run Test File
Testing Tab, 13

## S

Save
MultiLines Scenario Screen, 136
Save Mapping
MultiLines, 133
Save to File
Templates, 174
*Saving*
*Insbridge Document Viewer*, 87
Scenario
Creating New, 72
Editing, 73
Editing in MultiLines, 136
Editing, Step 2, 64
Naming for Impact Analysis, 61
Navigating to in MultiLines, 135
Navigation Bar in MultiLines, 136
Scenario Administrator
Impact Analysis, 59
Scenario Listing
Impact Analysis, 58
Scenario Name
Batch, 47
Editing a Scenario, 62, 65
Scenario Report
Deleting, 75
Renaming, 74
Scenario Reports
Impact Analysis, 59
Scenario Reports Listing
Impact Analysis, 59
Scenario Summary
Impact Analysis, 83
Job Duration, 83
Number of Results Filtered, 83
Number of Results Processed, 83
Scope
Library Listing, 142
Screen Options
Environment, 113
Package, 108, 113, 114
Search
Batch Rating Summary Report, 81
MultiLines Input Variables, 120
Selecting the Version
Reconcile, 158
Send Batch Responses to, 48, 50
Send Confirmation to
Batch, 44
Packaging, 104
Set
Filter, 66
Report Flag, 66
Shared Scenarios Tab
Testing Screen, 13, 27, 141
Show Listing For
MultiLines, 133
Size
Result File, Batch, 48
Testing Tab, 16
SoftRater Environment Override
Batch, 45
SoftRater Environment Override Option
Testing Tab, 14
SoftRater Node Definition, 188
SoftRater Packages
Environments, 187
Sort
Categories, 120
Source
Applying New Template, 138
Library Listing, 142
Source Program
MultiLines Mapping Listing, 132
Source Program Results
MultiLines, 133
Source Ver
Library Listing, 142
SR Definition, 188
SR-JAVA Definition, 188
SRP Definition, 188
srtp
File Extenstion, 176
SR-WIN Definition, 188
Standard Rating Summary Report, 26, 62, 76, 79
Debug, 31
Line of Bus, 28
Package Date, 29
Parent ID, 29
Program ID, 29
Program Name, 28
Program Version, 28
Rate Environment, 29
Rate Status, 29
Results, 30

Results, ID, 30
Results, Item Description, 30
Results, Values, 30
Start
Packaging Packaging Jobs Screen, 104
Starting
Packaging Job, 106
Statistics on Selected Result Elements, 83
Status
Release Content Listing, 99
Releases Listing, 93
Step 1 – Select Results
Impact Analysis, 61
Step 2 – Define Report
Impact Analysis, 64
Steps
MultiLines Scenario Screen, 136
Stop
Packaging Packaging Jobs Screen, 104
Rate Status, 29
Stop and Start Times
Impact Analysis Reports, 66
Stopping
Packaging Job, 108
Subline
Applying New Template, 138
Reconcile, 157
Sublines, 138
Supported
Number of Releases, 95
System Notifications
Releases, 95

## T

Target Program
MultiLines Mapping Listing, 132
Template
Sublines, 138
Templates
Applying, 150
Creating New, 148
Deleting, 148, 156, 166, 170
Download, 172
Editing, 147, 156, 166, 170
Existing Program in Library, 150, 154
Failed, 153, 155
File Name Rules, 176
Library, 137
Naming Files, 173, 176
New Program in Library, 150, 151
Rules, 140
Save to File, 174
Usage, 140
Testing
ActiveX Error Message Rating an Input File, 37
Actual XML Report, 24
Copying Files, 20
Copying Input and Result Files, 17
*Custom XML Files*, 23, 28
Deleting Files, 21
Deleting Result Files, 36
Editing Files, 20
Editing in Test Case Manager, 17
Errors, 37
Execute Custom Output Mapping, 18
Find, Navigation Bar, 27
Identifier, 23
Next, Navigation Bar, 27
Open/Rate New Custom Files, 22
Overview, 12
Previous, Navigation Bar, 27
Rating an Input File, 18
Rating Report, 24
Renaming Files, 20
Renaming Input and Result Files, 17
Reports, 24
Result File Information, 28
Right Click Menu Options, 17
Uploading Files, 19
View, Navigation Bar, 27
Viewing Actual XML, 25
Viewing Debug Report, 18
Viewing Reports, 26
Testing Tab
Add Worksheet Option, 13
Checkbox, 15, 16
Date Modified, 15
Date Run, 16
Debug, 16
Debug Options, 13
Delete, 13
File Name, 15, 16
Include Debug Report Option, 13
Input Files, 15
Menu Bar, 13
Navigating, 12
Output Files Filter Option, 14
Policies, 16
Refresh, 13
Result Files, 16
Run By, 16
Run Test File, 13
Shared Scenarios Tab, 13, 27, 141
Size, 16
SoftRater Environment Override Option, 14
Upload Local Rate File, 13
Version Override, 47
View Private, 14
View Public, 14
View Select, 13
Worksheet, 16, 47
Testing Tool
RateManager, 12
Time Stamp
Editing a Scenario, 63
Scenario Reports Listing, 59
Toggle Callout Versions, 130

Type
Input Variable Listing in MultiLines, 120
MultiLines, 134

## U

Updating Files, 171
Upload Local Rate File
Testing Tab, 13
Uploading Files
Testing, 19
User Created
Sublines, 138
Using
Add/Remove Report Flag, 68
Templates, 140

## V

Values
Batch Rating Summary Report Results, 81
Filter in Impact Analysis, 69
Filters, 70
Standard Rating Summary Report Results, 30
Variables
Debug Rating Report, 33
Reconcile, 161
Version
Exporting a Program Version, 139
For Programs, Impact Analysis Reports, 39
Version Name
Library Listing, 142
Version Override
Batch, 44, 48, 50
Editing a Scenario, 62
Testing Tab, 47
VFS Definition, 189
View
Navigation Bar Debug Test Case Editor, 77
Navigation Bar Testing, 27
View Select
Testing Tab, 13
View Where Used
Global Variable Listing Right Click Menu, 121
View XML
Batch, 48
Viewing
Actual XML Testing, 25
Debug Report Testing, 18
File Rated, 81
From Cache, 81
Line of Bus, 80
MultiLines Input XML, 124
Package Date, 81
Parent ID, 81
Program ID, 81
Program Information, 80
Program Name, 80
Program Version, 80
Programs Versions on MultiLines Program Listing Screen, 130
Rate Environment, 81
Rate Location, 81
Rate Status, 81
Report Impact Analysis, 82
Reports Reconcile, 163
Reports Testing, 26
Result File, 81
Virtual File Server Definition, 189

## W

Where base value is
Filters, 69
Where comp value is
Filters, 69
Where the diff is
Filters, 69
Where the value is
Filters, 69
Worksheet
Testing Tab, 16, 47

## X

XML Files
Creating Batch, 40
Deleting from Batch, 44, 57, 62, 65, 79
Rating Multiple, 39, 43
Viewing, 25
XML ID
MultiLines Elements, 126
XML Input File
Batch, 46
Example, 40
XML Wrapper
Added to Batch, 40