Oracle Insurance

Insbridge Enterprise Rating

RateManager User Guide

Tools Menu

Release 4.9

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Preface

Welcome to the *Oracle Insurance Insbridge Enterprise Rating RateManager User Guide for the Tools Menu.* This guide describes the features and functionality of the Oracle Insurance Insbridge Enterprise Rating RateManager (RateManager) Tools Menu. RateManager is a component within the Oracle Insurance Insbridge Enterprise Rating (Insbridge) System that enables users to manage the product definition and modification process, including rating and underwriting logic. The Tools Menu is where the majority of RateManager administrator functions are performed. References to the RateManager User Guide, which covers the Modules Menu, will be made periodically.

UPDATE NOTICE

Oracle Insurance Insbridge Rating and Underwriting has a new name, Oracle Insurance Insbridge Enterprise Rating. Insbridge Enterprise Rating more accurately reflects the updated and enhanced product offering that Oracle Insurance brings to the market. The name change also introduces Oracle Insurance Insbridge Enterprise Rating to other types of insurers. The expanded capabilities and wide ranging features still give P & C insurers the strength, flexibility, and capacity that they need but Insbridge Enterprise Rating also can be utilized by other types of insurers who require support for multiple lines of business, multiple product offerings, multiple rating formulas, and the ability to navigate complex business rules quickly and efficiently.

AUDIENCE

This guide is intended for RateManager system administrators who are tasked with 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 SoftRater Server User Guide.
- You can view these and other Insbridge 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.

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	P01-775-01	R 4.0	May 2010	New Release Update
2nd Edition	P01-775-02	R 4.0.1	August 2010	Updated Release
3rd Edition	P01-775-03	R 4.1	December 2010	Update Release
4th Edition	P01-775-04	R 4.5	May 2011	Update Release
5th Edition	P01-775-05	R 4.5.1	September 2011	Update Release
6th Edition	P01-775-06	R 4.6	May 2012	Update Release
7th Edition	P01-775-07	R 4.6.1	November 2012	Update Release
8th Edition	P01-775-08	R 4.7	September 2013	Update Release
9th Edition	P01-775-09	R 4.7.1	November 2013	Update Release
10th Edition	P01-775-10	R 4.8	July 2014	Update Release
11th Edition	P01-775-11	R 4.9	December 2014	Update Release

Chapter 1

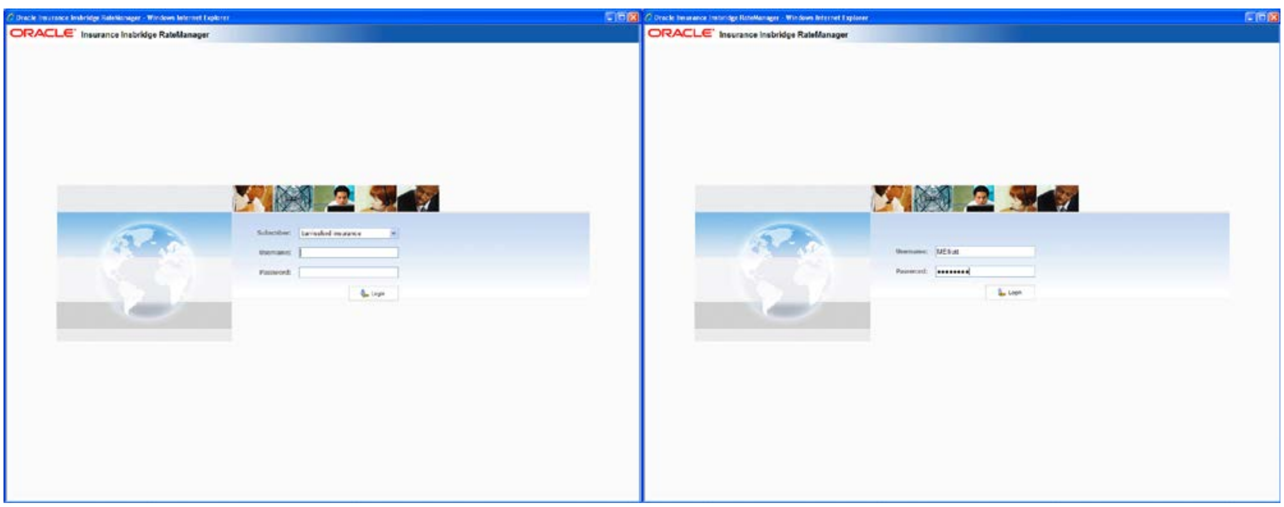
SYSTEM OVERVIEW

Prior to accessing RateManager, you should have received:

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

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

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



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

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

Figure 1 Login Screen

Logging In

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

A successful login places you on your Home Tab.

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

Help Logging In

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

Rights

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

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

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

Logging Out

The Logout option logs you out and closes RateManager.

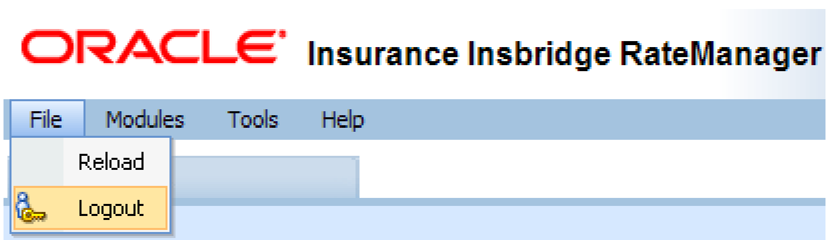


Figure 2 Logging Out

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

Internet Explorer

RateManager requires an ActiveX controller. Most of the time, you will be prompted to install this controller when you begin to use RateManager. A message bar will be displayed at the top of the screen. You can run the ActiveX controller from there. If you experience issues with some RateManager screens in Internet Explorer 8 or Internet Explorer 9, the ActiveX Control may need to be re-registered. Please contact your system administrator for the RateManager for the **RateManager_IE7_IE8.exe** included in the installation download.

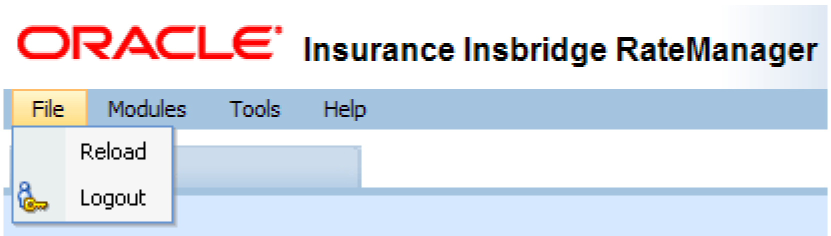
To install the Active X Controller, please see the RateManager End User Setup Guide, available on the OTN http://www.oracle.com/technetwork/documentation/insurance-097481.html

NOTE: *The Insbridge system currently requires Microsoft Internet Explorer release 8.0 32-bit or 9.0 32-bit.*

RATEMANAGER TABS AND MENUS

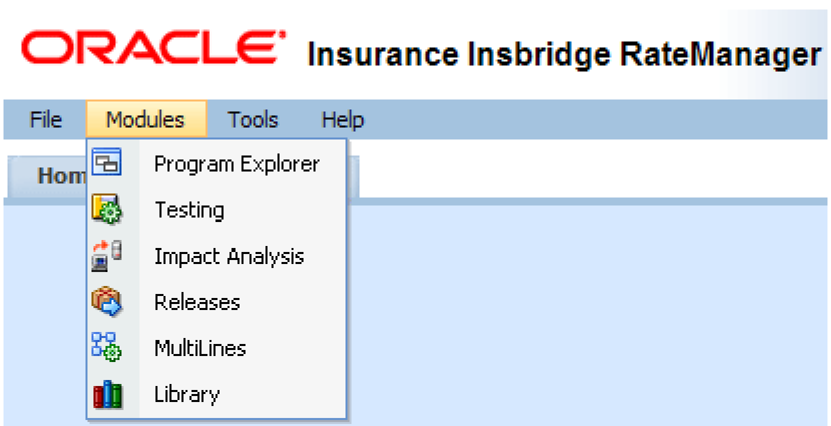
RateManager allows for multiple tabs to be utlized. The tabbed authoring interface allows for multiple activities to be open across separate tabs without losing any functionality. Each tab functions independently. You can view the Program Explorer, then edit a program version, and then create a new algorithm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

The RateManager tabs follows a familiar model, a fixed top bar menu with four options. Each option contains a menu of system features. Each feature opens either a new tab or a popup window.



The File menu:

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

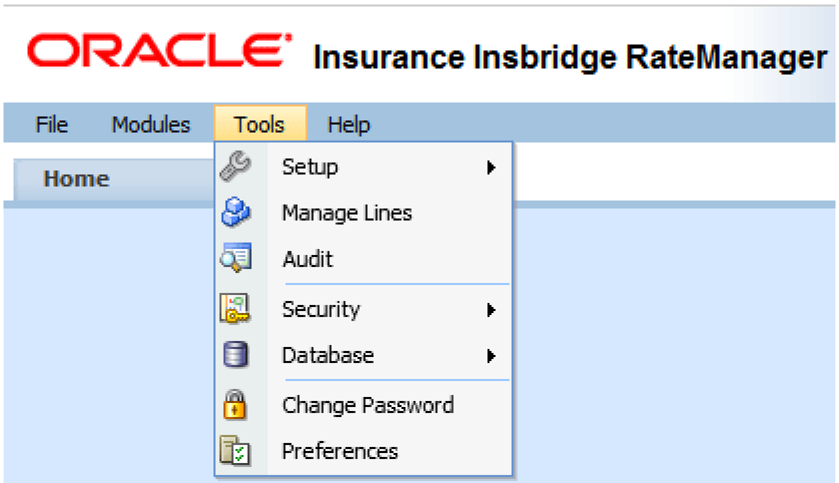


The Module menu:

- **Program Explorer:** the program explorer holds sublines, folder, programs and program versions. Many of the procedures and functions performed under the line of business are found here.
- **Testing:** opens the testing module. This area is where you can test your rating program during development without loading packages.
- **Impact Analysis:** opens the area for batching and data analysis.
- **Releases:** allows groups of rating packages to be automatically deployed and loaded to IBFA through a release. If you do not have release rights, this option will not be displayed. Please see the RateManager Modules User Guide Volume 2 for more information.

- **MultiLines:** a collection of programs from all lines of business combined with output mappings and assigned to execute in sequence that returns a single or multiple results.

- **Library:** the library is where custom XML files used in mappings as well as imported and template programs are stored and managed.



The Tools menu:

- **Setup:** expands for access to the Naming Standards option, System Level Constants, and Message Templates.

- **Manage Lines:** opens a screen where administrators can manage lines of business. This is an advanced system feature and may not be available to all users.

- **Audit:** contains the audit logs of system users. In previous releases, this area was called Logs. This is an advanced system feature and may not be available to all users.

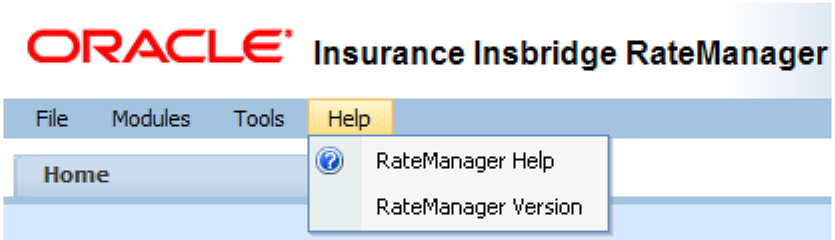
- **Security:** is where users, user groups and sessions are managed. This is an advanced system feature and may not be available to all users.

- **Database:** this area is for administrators to create backups and deploy updates. This is an advanced system feature and may not be available to all users.

- **Change Password:** allows users to change their password.

- **Preferences:** brings up the window where you can select the snaps you want to display on your Home Tab. For advanced system users, system setup information will be displayed.

This guide focuses on the features and functionality in the Tools menu.

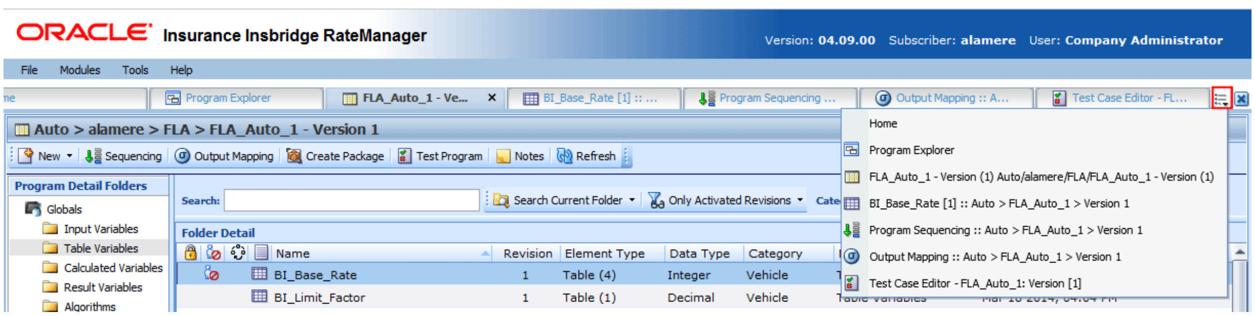


The Help menu:

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

Tab Navigation

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



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

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

Keyboard Shortcuts

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

- **Control + X** cuts text.
- **Control + C** copies text.
- **Control + V** pastes text.
- To go to the beginning of an entry, use the home key on your keyboard.
- To go to the end of an entry, use the end key on your keyboard.

Home Tab

Once you have logged in, you will be on your Home Tab. The Home tab has a control panel that contains links to all the major components of the Module menu and one module in the Tools menu. The Home tab is always the first tab and cannot be closed.

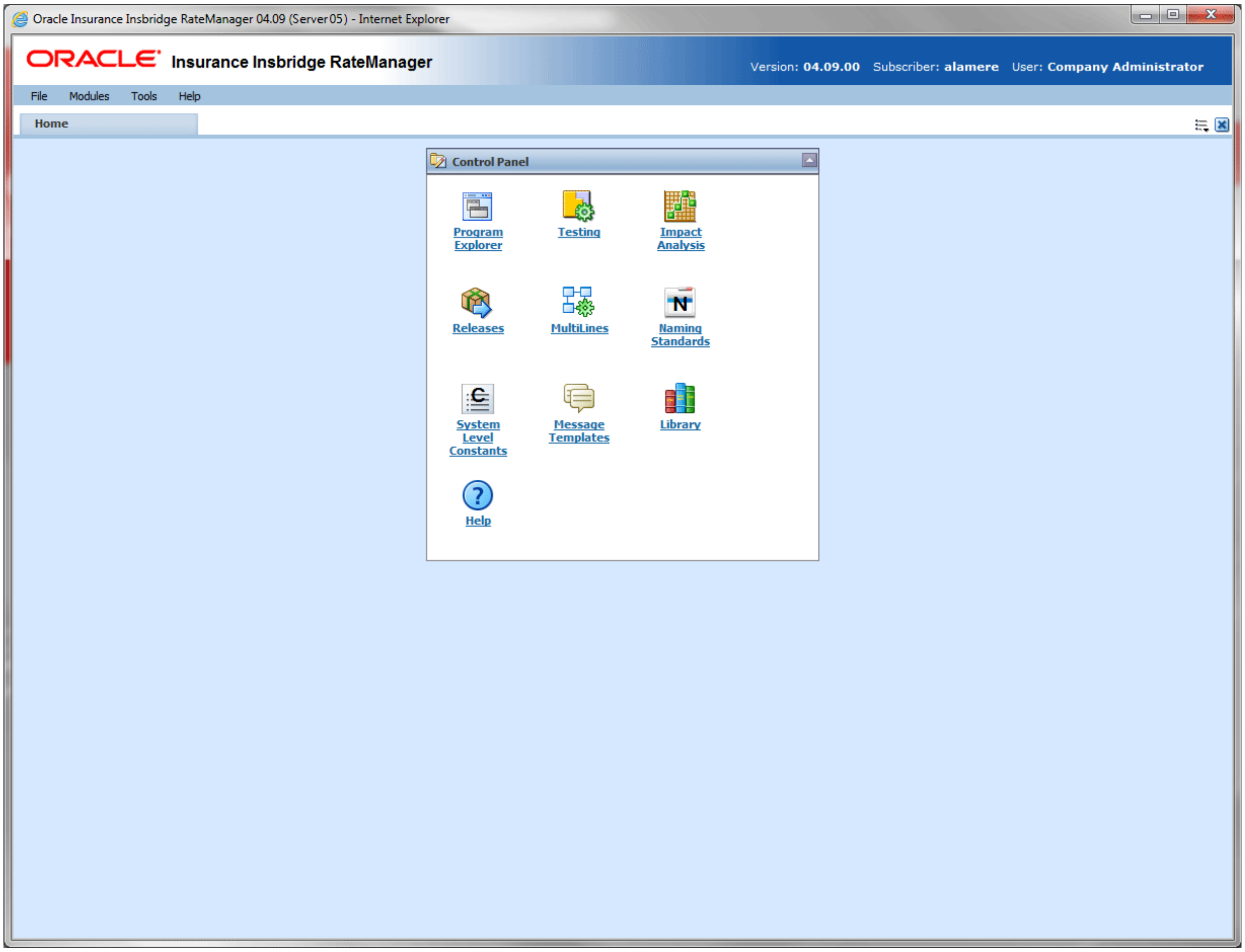


Figure 3 Home Tab

Access to the pages you are authorized to view or work on is gained by selecting the area you want from Tools in the menu bar.

For more on the Home Tab, please see RateManager Modules User Guide available on the OTN http://www.oracle.com/technetwork/documentation/insurance-097481.html.

SETUP

Setup contains options that can be used throughout RateManager. Options are:

- **Naming Standards –** The Naming Standards feature is where you can define a naming standard that can be applied throughout the system, or to a specific LOB, or to specific elements.
- **System Level Constants –** The System Level Constants feature allows for user defined constants that are availabie system wide to be managed.
- **Message Templates –** The Message Templates feature is where elements for user defined messages are managed.
- **Reports –** The Reports feature allows for access to the IBRM data in a relational data structure and format that can be used for reporting.

Permissions Required

Every user can view the content in Setup options.To create, edit, or delete Naming Standards, System Level Constants, and Message Templates or Update Reporting Views in Reports, you must have any Domain Admin permissions. Domain Admin permissions include Line Management and Subline Management. If you do not have either of these permissions, you will not be able to create, edit or delete in Naming Standards, System Level Constants, and Message Templates or Update Reporting Views in Reports.

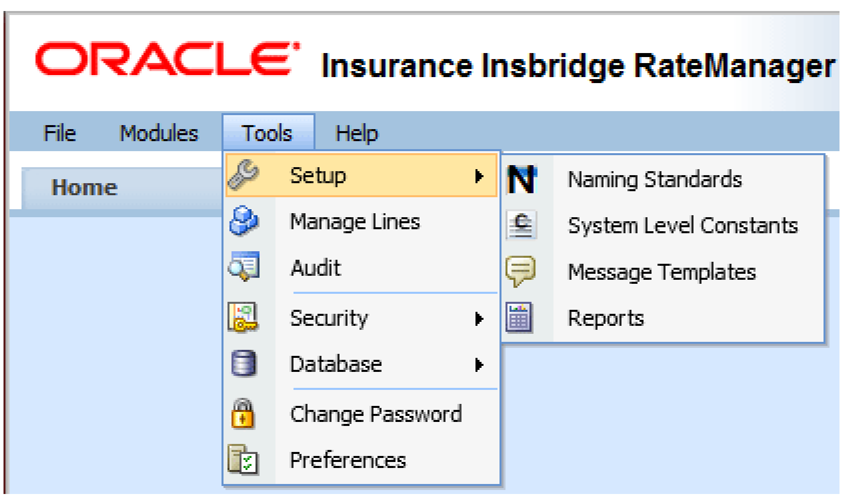


Figure 4 Tools->Setup Menu Options

NAMING STANDARDS

Naming standards allows you to enforce a uniform naming structure to system elements and programs. The naming structure can be the same across all elements or it can be varied across one or more elements. Naming standards allow for prefixes or suffixes to be attached and for case enforcement to be applied to any newly created element or any existing elements that are being edited.

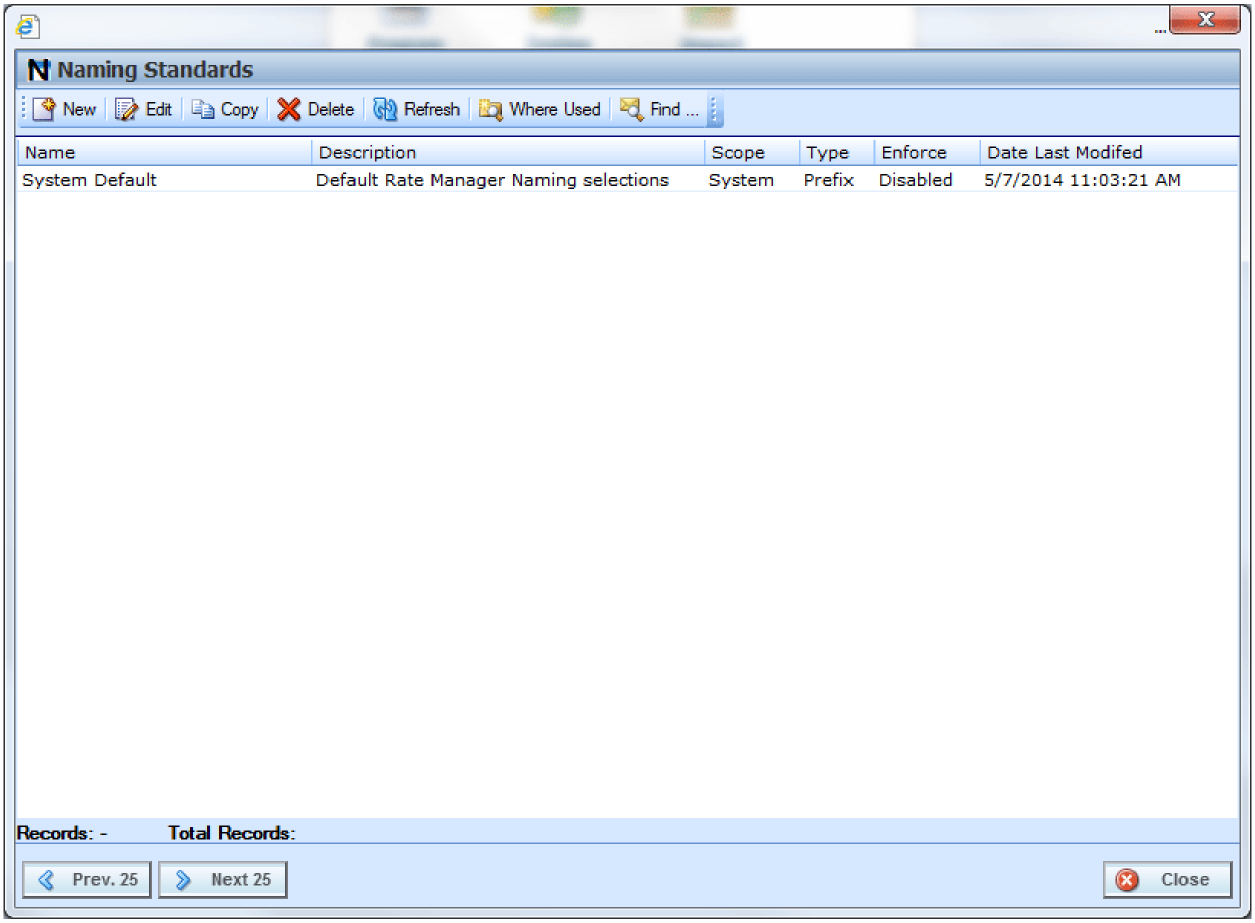
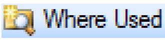


Figure 5 Naming Standards for Users with Permissions

Naming Standards Functions

New	**New:** New starts the process of creating a new naming standard. See Creating a New Naming Standard for more information.
Edit	**Edit:** Opens the Edit Naming Standard screen for the currently selected naming standard.
Copy	**Copy:** Copies the selected naming standard.
Delete	**Delete:** Removes the selected naming standard from the list.
Refresh	**Refresh:** Refreshes the list of naming standard.

	**Where Used:** Shows a Where Used report indicating where the selected naming standard is used.
	**Find:** Searches all naming standards for the value entered in the search field and returns with a list of matching results.

Naming Standard Fields

Naming standards are listed in alphabetical order with the total number naming standards displayed on the bottom of the screen.

- **Name:** A user created identifier assigned to each naming standard. Each name must be unique. Names cannot be edited.
- **Description:** A user defined description of the naming standard.
- **Scope:** Lists whether the naming standard is system or custom.
  - **System:** A system naming standard is the default naming standard. The default naming standard uses a prefix type that cannot be edited or deleted. Only the enforce option can be changed.
  - **Custom:** Custom naming standards are user created with all fields open for editing. Custom naming standards can be deleted if they are not being used.
- **Type:** The type of naming standard; suffix, prefix or case. Naming standards can be one type.
  - **Suffix:** A 1-5 digit tag attached to the end of the element.
  - **Prefix:** A 1-5 digit tag attached to the front of the element.
  - **Case:** A validation that the element name follows a specific case pattern.
- **Enforce:** Indicates if the naming standard is enabled or disabled.
- **Date Last Modified:** The date the last modification was made to the naming standard.

Manage Naming Standards Functionality

The Naming Standards screen allows you to:

- Create a New Naming Standard
- Edit a Naming Standard
- Copy a Naming Standard
- Search for a Naming Standard
- View Where a Naming Standard is Used
- Delete a Naming Standard

Creating a New Naming Standard

Naming Standards can be accessed either from Tools->Settings->Naming Standards or from the Naming Standards icon on the Home page. Naming Standards can be created at any time. The upper part of the New Naming Standard screen holds the descriptors for the entire Naming Standard.

Naming Standard Descriptors

Name: A user created identifier assigned to each naming standard. Names can be up to 25 alpha numeric characters and allowed special characters. Names must be unique. Names cannot be edited once the Naming Standard has been saved. If you have made a mistake with the name, you must create a new naming standard. The incorrect naming standard can be deleted if it is not in use.

Description: A user defined description of the naming standard. Descriptions can be up to 75 alpha numeric characters and allowed special characters. Descriptions can be edited at any time.

NOTE: *Please see the RateManager User Guide Volume 1 for a listing of disallowed special characters.*

Type: The type of naming standard; suffix, prefix or case. Naming standards can be one type but can be edited at any time. There are three types of naming standards:

- **Suffix:** A 1-5 digit tag attached to the end of the element. For example, ElementName_END
- **Prefix:** A 1-5 digit tag attached to the front of the element. For example, AND_ElementName.
- **Case:** A validation that the element name follows a specific case pattern. Case is set per element within the naming standard definition.

Enforce: Indicates if the naming standard is to be strictly enforced when new elements are created or when existing elements are edited. Enforcement can be enabled or disabled at any time by editing the Naming Standard and changing the enforce option. There are two options for enforce:

- **Enabled:** A naming standard that is enabled means that the element name is validated against the type and defined details for the naming standard prior to being saved. If the naming standard is met, the entry is saved. If the entry does not follow the naming standard, then an error message is displayed.
- **Disabled:** A disabled naming standard means that the naming standard is not validated. The suggested naming standard is presented when creating new elements but if the entry does not follow the naming standard, it will be accepted.

NOTE: *Element naming restrictions will still be observed. For example, even if the naming standard is met, if an element contains a restricted character, an error message will be displayed. For more on naming restrictions, please see Restrictions in the RateManager User Guide.*

Date Last Modified: The date the naming standard was last modified. This is an information only field.

Naming Standard Definitions

The lower portion of the New Naming Standards screen contains the naming standard definition details. There are three columns of information.

Name: The name of the element where the naming standard is to be applied. This is an information only field.

Enter (Type): This field holds the values to be used by either the suffix or the prefix. For Case types, no entry is needed.

- **Suffix:** A 1-5 digit tag attached to the end of the element. Entries can be alpha numeric characters and allowed special characters. For example, ElementName_END
- **Prefix:** A 1-5 digit tag attached to the front of the element. Entries can be alpha numeric characters and allowed special characters. For example, AND_ElementName.
- **Blank:** If a field is left blank, no validation is done for suffix or prefix types. Validation is done for case types.

The Enter (Type) field can be edited at any time. Validation for new or edited elements is against the current value in the field. For example, you created element TABLE_ABC using a naming standard that had a suffix value of ABC. Then you updated the naming standard to have a required suffix value of XYZ. If you edit the element you created with the naming standard of ABC, when you go to save, you will have to update the suffix to XYZ in order to save.

You can enter values for one or more fields. If you only want a prefix attached to Program names only, you can create a naming standard where only the program Name prefix is validated. You can pick and choose the elements where you want a naming standard to apply.

Case: A validation that the element name follows a specific case pattern. Case is set per element within the naming standard definition. There are four case settings:

- **All Upper:** Only upper case letters are allowed.
- **All Lower:** Only lower case letters are allowed.
- **Camel:** Only camel case letters are allowed. For example, ElementName or tableVariable.
- **No Check:** Case is not validated. Any case can be used.

You can enter case validation against any suffix or prefix. If Case is the type, you can select the elements where you want case to be validated.

You can create multiple Naming Standards and apply a different Naming Standard in each LOB or use the same Naming Standard system wide.

Creating a Naming Standard

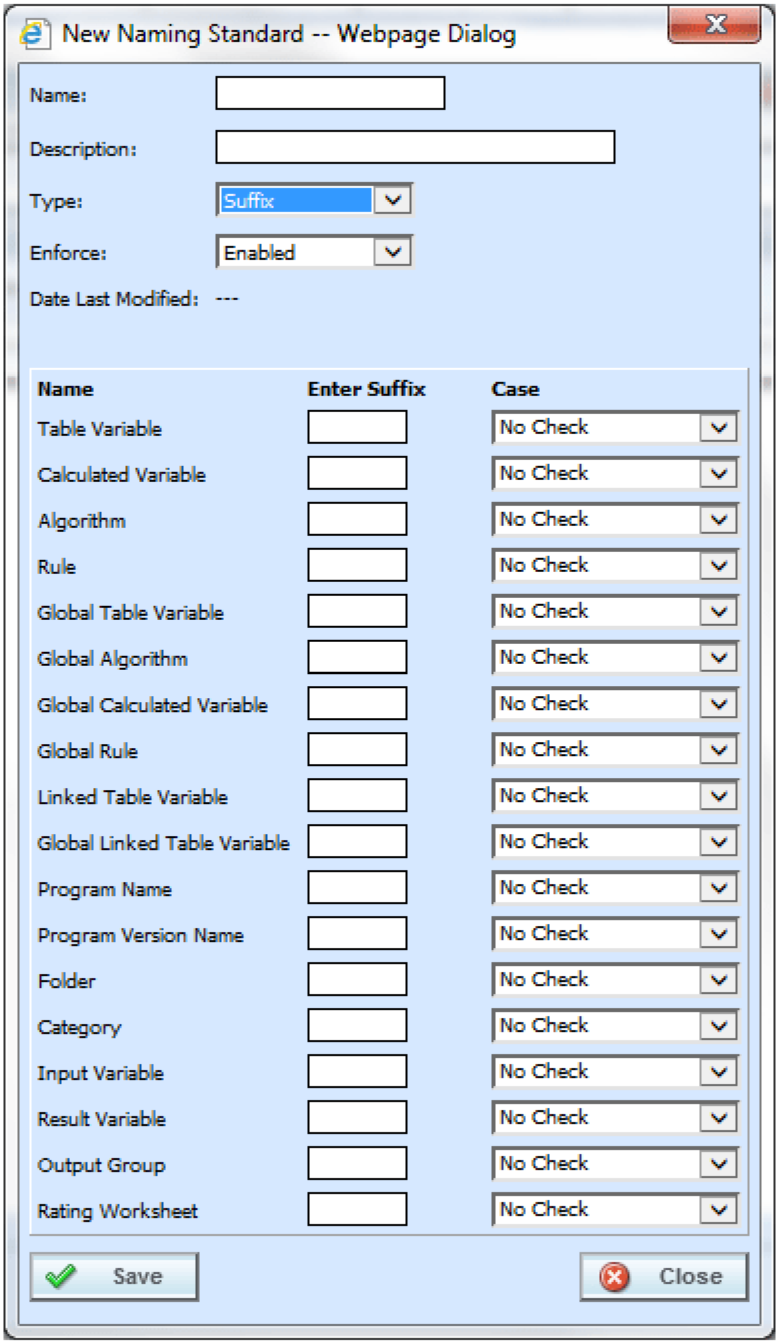


Figure 6 New Naming Standard

1. From the Naming Standards screen, click New to open the New Naming Standards screen.
2. Enter the Name. The Name cannot be edited after saving. Make sure the name is what you want.
3. Enter a Description.
4. Select the Type.

5. Select the Enforce option.
6. Enter the details.
7. Click Save to save your entry.
8. Reload the system to apply the updated settings.

Edit a Naming Standard

Naming Standards can be edited at any time. Only the Name field cannot be edited. All other fields are open for editing. Validation happens against the current Naming Standard.

1. From the Naming Standards screen, select the Naming Standard you want to edit and click Edit to open the Edit Naming Standards screen.
2. Make your updates.
3. Click Save to save your entry.
4. Reload the system to apply the updated settings.

Copy a Naming Standard

Any Naming Standard can be copied. The copy is an exact copy of the selected Naming Standard, including enforcement.

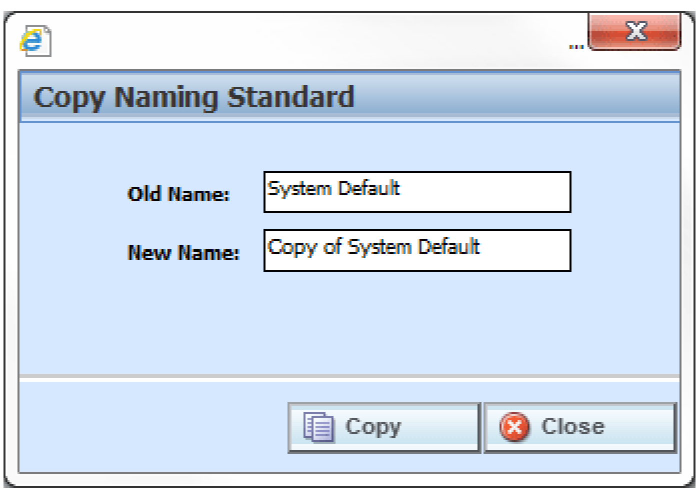


Figure 7 Copying Naming Standard

1. From the Naming Standards screen, select the Naming Standard you want to copy and click Copy to open the Copy Naming Standards screen.
2. Enter in a New Name.

3. Click Copy. The copied Naming Standard is listed on the Naming Standards screen. The copy can be edited or applied. If the copy is not displayed, click Refresh to refresh the screen.

Search for a Naming Standard

The search option searches the name field. You can search for the exact name or for the beginning characters of a Naming Standard. Results returned contain the entire search criteria. For example, if you search for ABC, all names that start with ABC are returned along with the Naming Standard called ABC. Searches are not case sensitive.

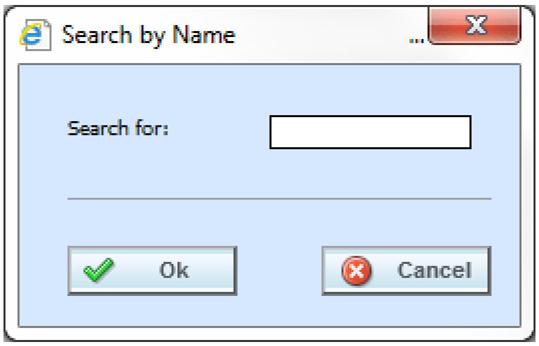


Figure 8 Searching for a Naming Standard

1. From the Naming Standards screen, click Find to open the Search by Name screen.
2. Enter the name or first few characters of the Naming Standard you want to search for.
3. Click Ok.
4. Results are displayed in the Naming Standards screen.
5. To clear search results, click Refresh. This returns the Naming Screen.

Double click to view or edit search results. If you open a Naming Standard and click Close, you are returned to the search results. If you open a Naming Standard and click Save, you are returned to the Naming Standards screen. The search results are removed.

View Where a Naming Standard is Used

View Where used is helpful when you want to see where a Naming Standard is applied.

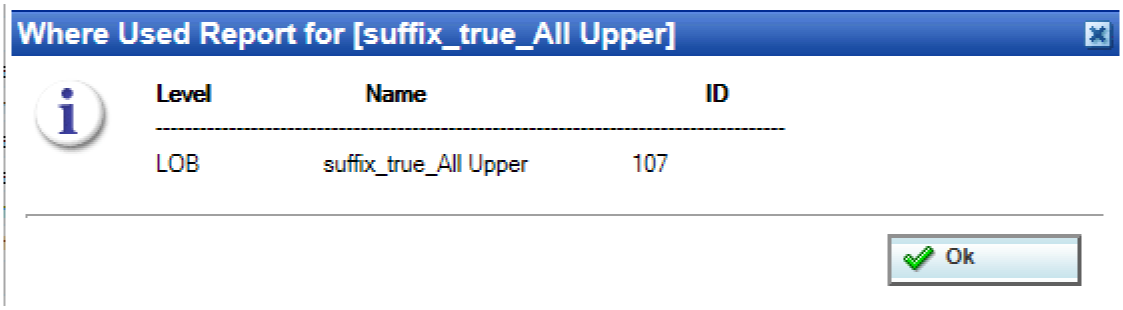


Figure 9 Where User Report for Naming Standards

1. From the Naming Standards screen, select the Naming Standard that you want to see where it is being used.
2. Click Where Used. Results are displayed in a Where Used Report.
3. Click Ok to close.

Delete a Naming Standard

Naming standards that are not in use can be deleted. If a Naming Standard is being used, you must clear it from being used. Make sure this is the action you want to take. This action cannot be undone.

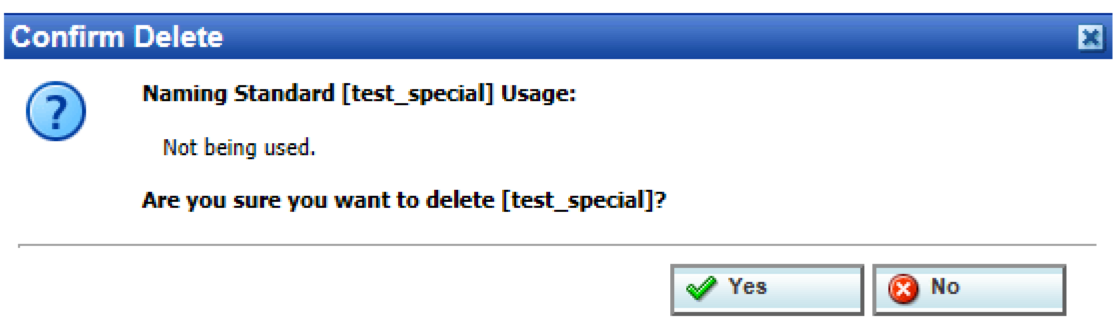
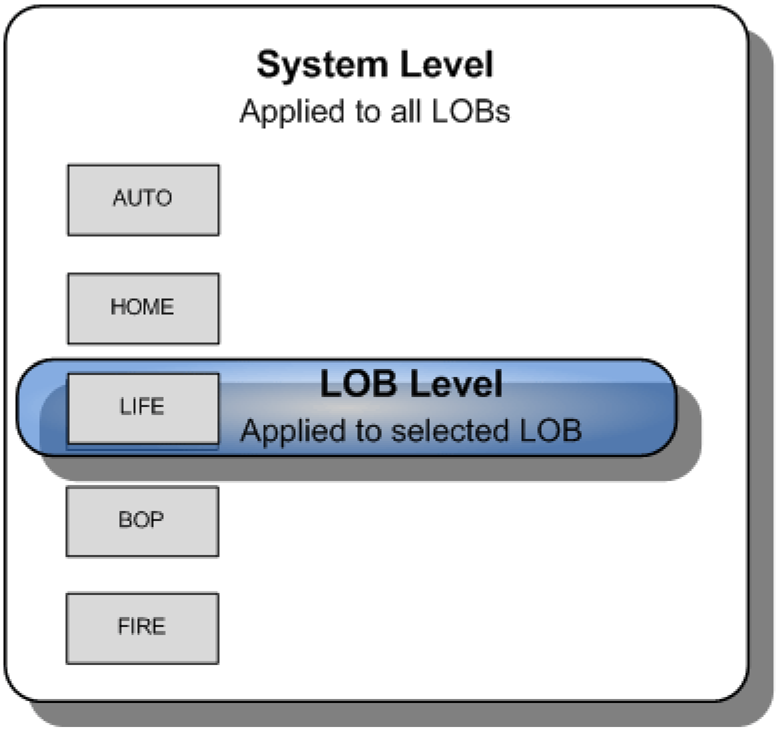


Figure 10 Deleting a Naming Standard

1. From the Naming Standards screen, select the Naming Standard you want to delete and click Delete.
2. A confirmation screen is displayed. Click Yes to delete the Naming Standard. Click No to return to the previous screen.
3. Deleting removes the Naming Standard immediately.

NAMING STANDARDS HIERARCHY

Naming standards can be applied system wide or at the LOB level. Naming standards applied at the LOB level take priority over the system level naming standard.



If an LOB has a naming standard assigned to it, that naming standard is used even if there is a system level naming standard.

If an LOB does not have a naming standard assigned, then the system level naming standard is used.

Figure 11 Naming Standard Hierarchy

There is a system default naming standard that cannot be edited or deleted. The system default Enforce option is disabled by default.

The default setting is for no naming standard to be used.

Naming Standards Rights

Line Management permissions are required to create, edit, or delete a naming standard. Line Management permissions also allow you to assign a naming standard at the LOB level. To set naming standards at the system level, you must have administrator permissions. Permissions are set at the group level. If you do not have permission, please contact your system administrator.

Updates to naming standards are logged as audit items if auditing has been enabled for the user group.

Applying Naming Standards System Wide

To apply system wide naming standards, you must have administrator permissions. If you do not have the Administrator option on the Preferences screen, you do not have permissions to apply naming standards system wide.

To make a naming standard required it must be enabled. If a naming standard is disabled, the pattern will be presented but it will not be mandatory to follow. Prior to assigning, make sure the naming standard you want to use is in the status you need. Naming standards that are to be applied system wide must be selected and saved in the Preferences screen.

If you do not select a naming standard, the system default one is used. The default naming standard field must have an entry.

To clear the field of the current value, click Clear.

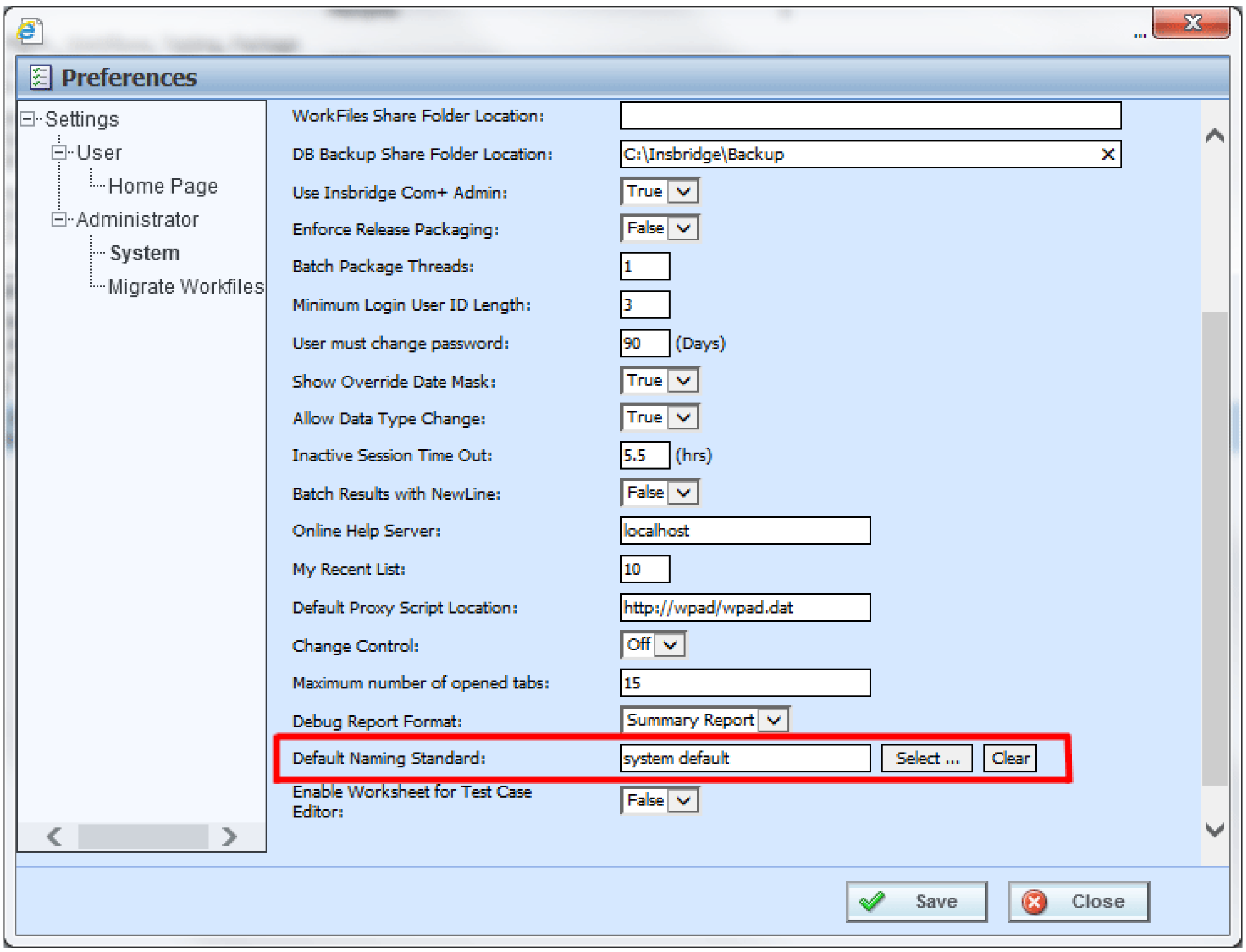


Figure 12 Naming Standards in Preferences

1. Open the system settings in Tools->Preferences->Administrator->System.
2. Locate Default Naming Standard and click Select. The Naming Standards screen is displayed.

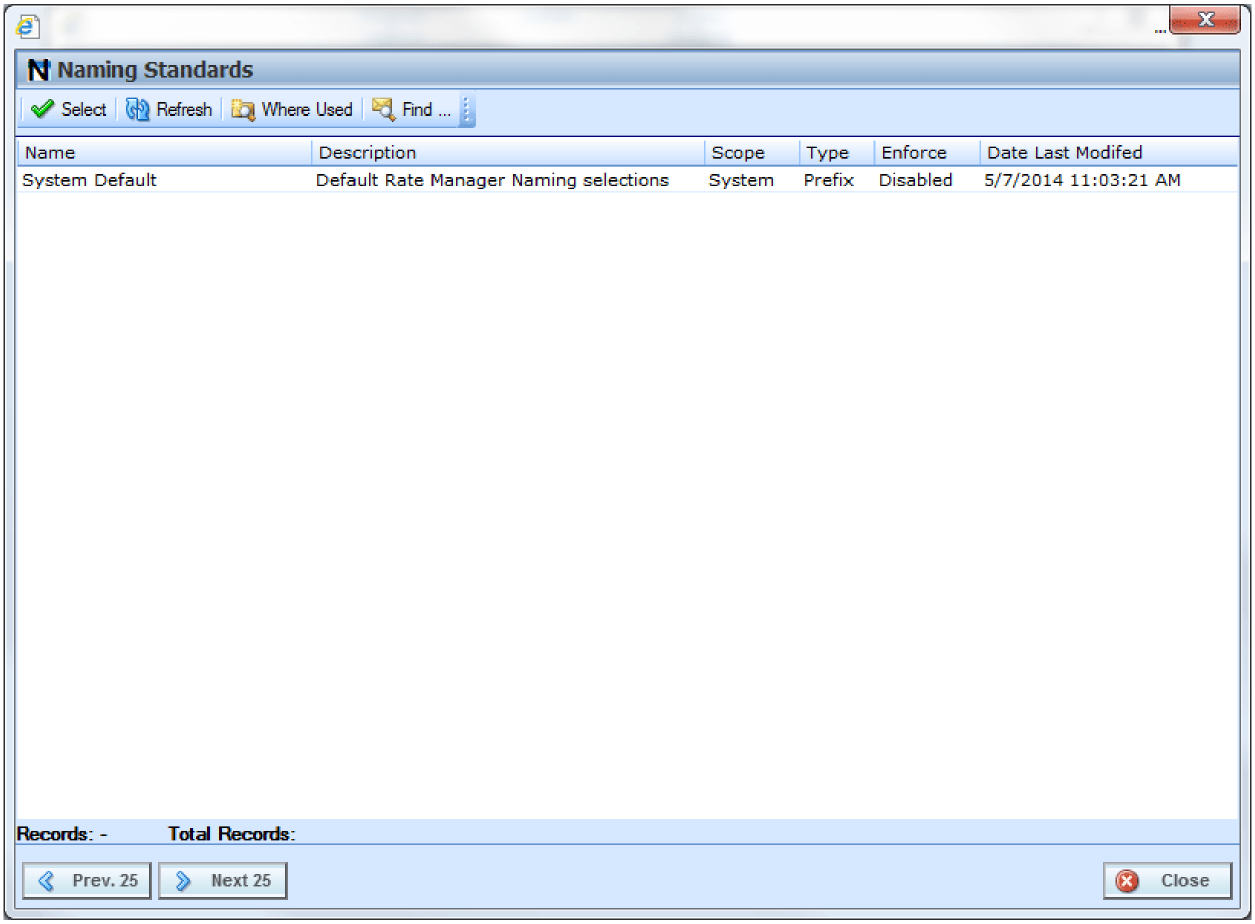


Figure 13 Select Only Naming Standard

3. Select the naming standard you want applied to all LOBs and click Select. The Naming Standards window closes, returning you to Preferences.

4. Click Save to save your entry in Preferences.

5. Reload the system to apply the updated Preferences.

Applying Naming Standards to an LOB

To apply naming standards to an LOB, you must have Manage Lines permissions. If you do not have the Manage Lines option on the Tools menu, you do not have permissions to apply naming standards to an LOB.

To make a naming standard required it must be enabled. If a naming standard is disabled, the pattern will be presented but it will not be mandatory to follow. Prior to assigning, make sure the naming standard you want to use is in the status you need. Naming standards must be selected and saved at the LOB level.

The default is for no naming standard to be applied to a line. If you do not want a naming standard at the line level, click clear to clear the field. When the field is clear, no naming standard is applied to the line.

1. Open the Manage LOB screen in Tools->Manage Lines.
2. Select the line where you want to apply a naming standard and click Edit. You can also apply naming standards to a new line.

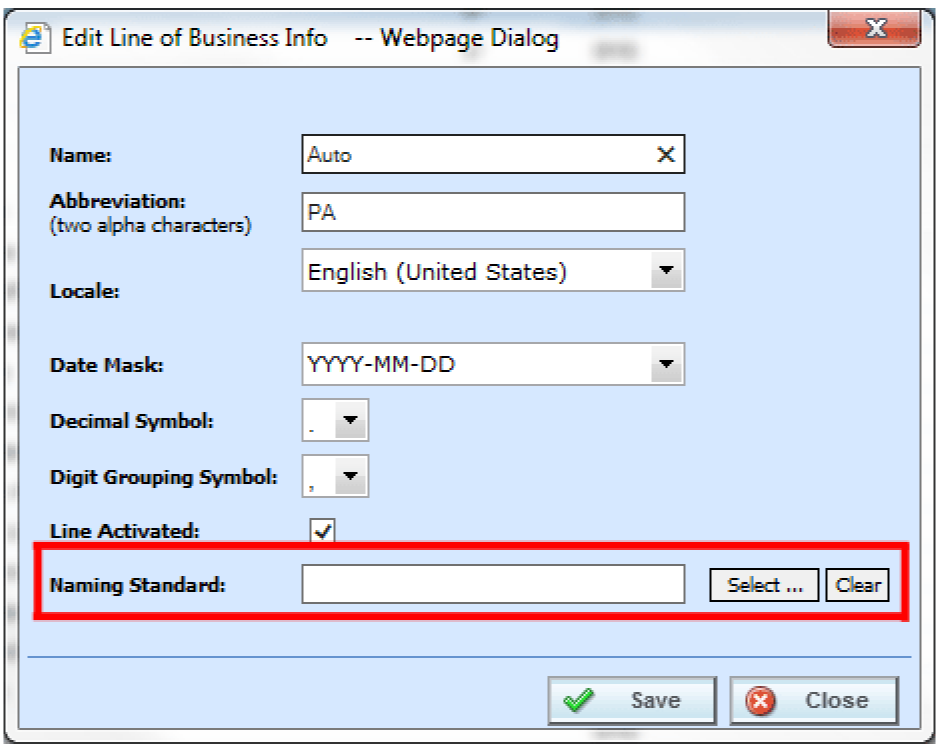


Figure 14 Editing an LOB to Add Naming Standards

3. Locate Naming Standard and click Select. The Naming Standards screen is displayed.

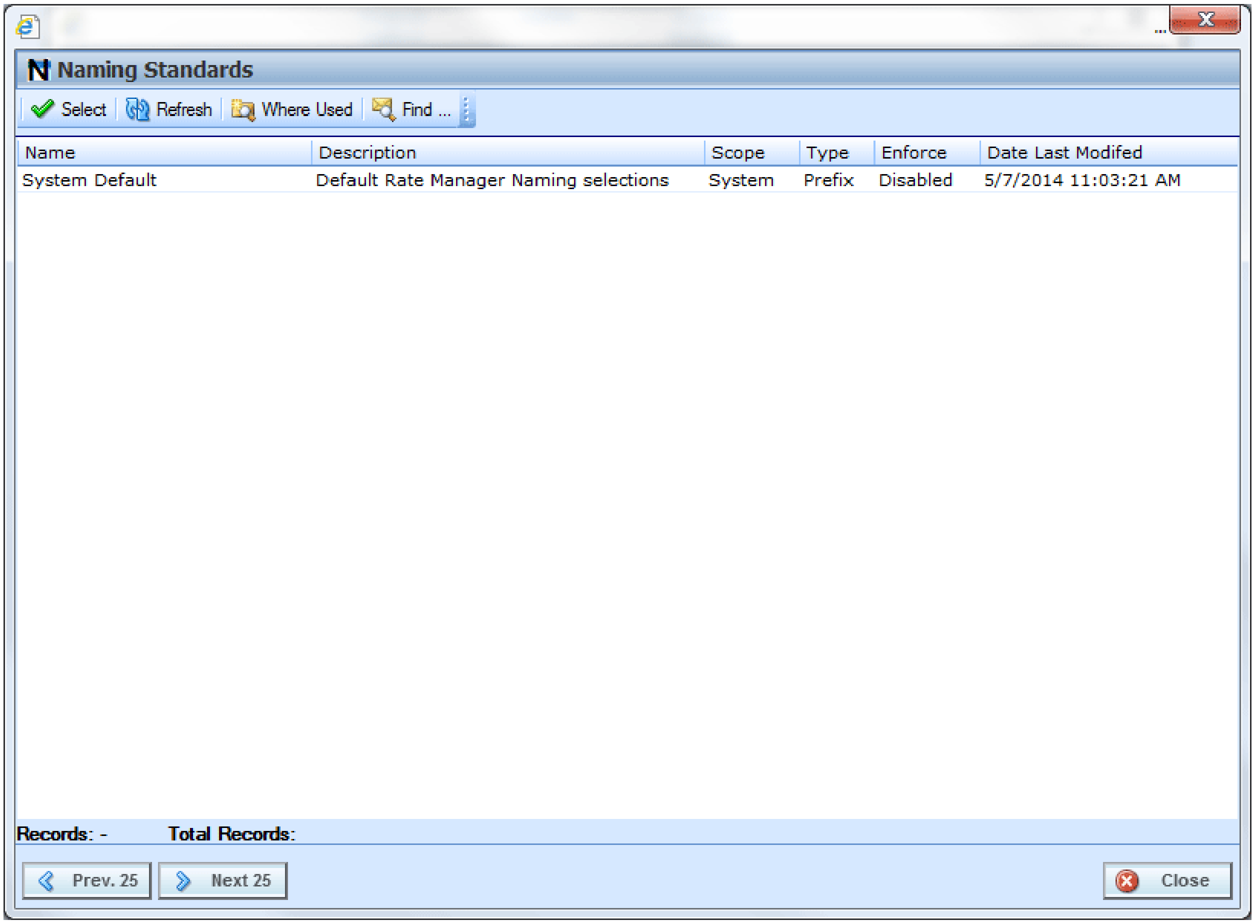


Figure 15 Select Only Naming Standard

4. Choose the naming standard you want applied to the LOB and click Select. You will be returned to the Edit LOB screen.

5. Click Save to save your entry. If you are done editing, close the Manage LOB screen.

6. Reload the system to apply the updated settings.

Viewing Naming Standards

If you do not have permissions to create, edit or delete a naming standard, you can view the details. The options on the screen are limited to refresh, where used and find.

Naming Standards in Use

When creating a new variable, folder, program or program version, if a naming standard is assigned, a suggested name populates in the name textbox.

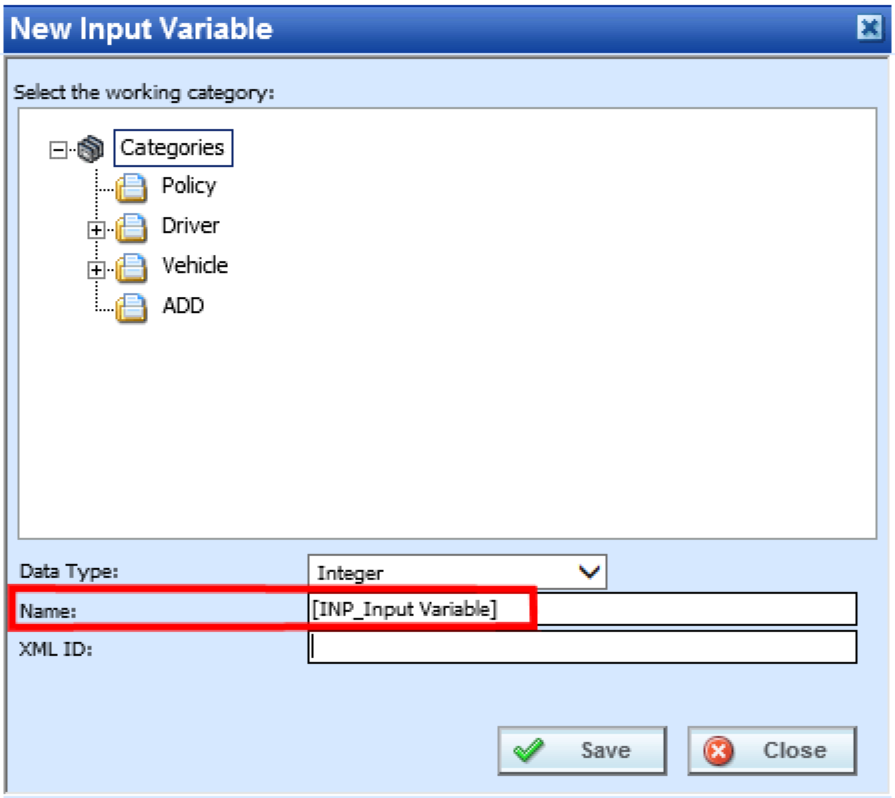


Figure 16 Example of Naming Standard

If the naming standard is set to enabled, the system validates the entry. The variable must use the required naming standard in order to be saved. If it fails, an error message is displayed indicating what the error is. The error must be corrected before the entry can be saved.

If the naming standard is disabled, no system validation takes place.

Copying or Creating New Revisions or Versions

When copying a program or an element and naming standards are enabled, then the naming standard is applied to the copied name. If the name does not pass validation, an error message is displayed. The elements inside the program are not impacted unless edited. When copying a program or an element and naming standards are disabled, no validation takes place.

If Naming Standard is enabled when editing an existing element, the current naming standard is applied.

Naming Standards are not validated when importing Public XML files.

SYSTEM LEVEL CONSTANTS

System Level Constants is where pre-defined constants can be viewed and user-defined constants can be created and managed. There are two types of system level constants:

- **Pre-defined:** Pre-defined constants are fixed values and system values that are found in every line of business. This type of constant is built in to the Insbridge system. Pre-defined constants are locked and cannot be edited, or deleted. There are two types of pre-defined constants.
    - **Fixed:** These constants have a fixed value. 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 100, 1000, 10000, Y, YES, N, NO, and NULL. The value of these constants cannot be changed. If you want a different value, you can use a Custom Value, create an input with that value or create a user-defined constant with that value.
    - **System Value:** A constant value that comes from the system. System values can also be used as table variable criteria. There are five system values:
        - **Current Category Instance #**: This is the instance that the category is currently on. For example, you may have an auto program where you can enter multiple vehicles. Each vehicle would have its own instance in the vehicle category. If you limit personal auto to 9 vehicles, you may want to set a rule or trigger another action if the vehicle instance is 10.
        - **Current System Date and Time**: Current server time and date at the time of execution.
        - **Current System Date**: Current server date at the time of execution.
        - **Current Program Version**: The current program version being used at the time of execution.
        - **Current Rating Environment**: The current rating environment being used at the time of execution.
- **User defined:** User-defined constants are values that are created by system users and consist of two types:
    - **System Level:** These are found in every line of business and are created in the System Level Constants area.
    - **Domain Level:** These are found in every subline of a specific line of business and can be viewed in the globals tab of every subline. These are managed at the Line of Business (Domain) level.

NOTE: *User-defined domain constants are managed in another area, Modules→Program Explorer→LOB→subline→Globals. When working on constant, make sure you are in the correct location.*

Constant Listing

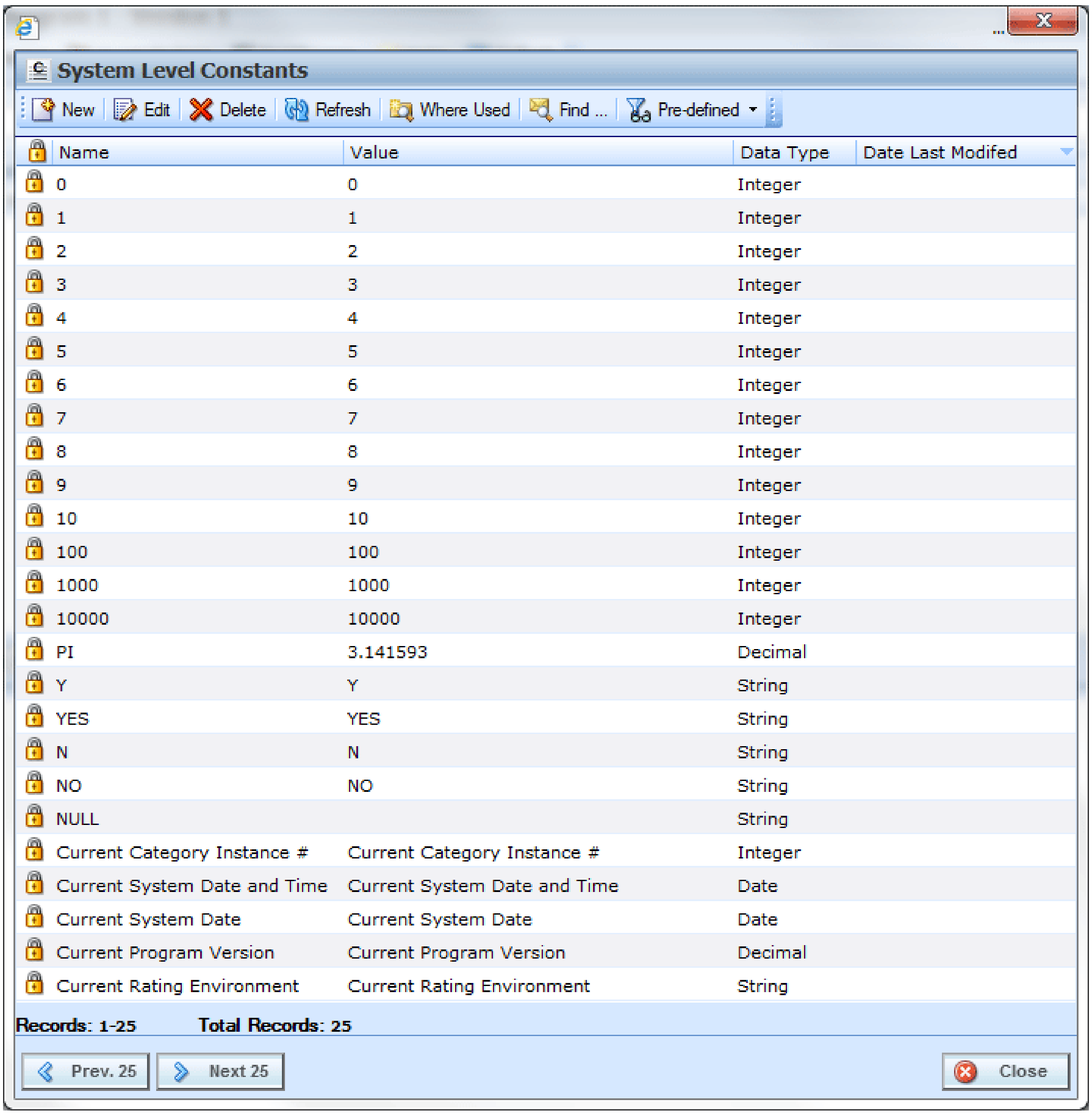
Constants can be used in table variables, calculated variables, algorithms and drivers assignments.

In the Available Variables, Functions and Constants list, system level constants are listed with pre-defined constants first, followed by user-defined constants and custom values last. Domain constants are in a separate list.

Navigating to System Level Constants

There are two ways to access System Level Constants.

- System Level Constants can be accessed by clicking the System Level Constants icon on the Home tab.
- Tools→Setup→System Level Constants. This opens the System Level Constants window.



Name	Value	Data Type	Date Last Modifed
0	0	Integer	
1	1	Integer	
2	2	Integer	
3	3	Integer	
4	4	Integer	
5	5	Integer	
6	6	Integer	
7	7	Integer	
8	8	Integer	
9	9	Integer	
10	10	Integer	
100	100	Integer	
1000	1000	Integer	
10000	10000	Integer	
PI	3.141593	Decimal	
Y	Y	String	
YES	YES	String	
N	N	String	
NO	NO	String	
NULL		String	
Current Category Instance #	Current Category Instance #	Integer	
Current System Date and Time	Current System Date and Time	Date	
Current System Date	Current System Date	Date	
Current Program Version	Current Program Version	Decimal	
Current Rating Environment	Current Rating Environment	String	

Figure 17 System Level Constants

System-level Constants Functionality

Functions can be accessed from the menu bar located at the top of the screen. The functions you can perform depend on the type of constant. There are icons that can tell you at a glance what the status of the constants is.

Icon	What it Indicates
	Locked Constants. A lock icon indicates that this constant is system generated. System generated constants are not open for copying, editing, or deleting.

System Level Constants Functions

New	**New:** New starts the process of creating a new user-defined constant. See Creating a New User Defined Constant for more information. Pre-defined constants cannot be created.
Edit	**Edit:** Opens the Edit User Defined Constant screen for the currently selected user defined constant. Pre-defined constants cannot be edited.
Delete	**Delete:** Removes the selected user-defined constant from the list. Pre-defined constants cannot be deleted.
Refresh	**Refresh:** Refreshes the list of pre-defined or user-defined constants.
Where Used	**Where Used:** Shows a Where Used report indicating where the selected user-defined constant is used. Pre-defined constants cannot produce a Where Used report.
Find ...	**Find:** Searches the Name field in the currently displayed constants for the value entered in the search field and returns with a list of matching results. For example, a search in User-defined Constants does not return any matching values from the Pre-defined constants list.
User-defined Pre-defined User-defined	**Pre-defined/User-defined:** Selector for User-defined or Pre-defined constants. The option selected here determines the content displayed.

System Level Constants Fields

Constants are listed in alphabetical order with the total number of constants displayed on the bottom of the screen. The total reflects only the constants on the selected list; pre-defined constants are not included in user-defined constants totals.

- **Name:** The name of the constant. A user-defined constant allows for a unique identifier to be assigned to constant. Names cannot be edited on pre-defined constants.

- **Value:** The value used by the constant. Values cannot be edited on pre-defined constants.
- **Data Type:** Lists the data type of the constant. Data types of constants cannot be edited.
  - **Integer**
  - **String**
  - **Date**
  - **Decimal**
- **Date Last Modified:** The date the last modification was made to the constant.

System Level Constants Right Click Menu

There are no System Level Constants right click menus.

System Level Constants Functionality

The System Level Constants screen allows you to:

- Create a New User-defined Constant
- Edit a User-defined Constant
- Search for a Constant
- View Where a User-defined Constant is Used
- Delete a User-defined Constant

Creating a New User-defined System Level Constant

User-defined system level constants can be created at any time.

User-defined Constant Descriptors

Name: A user created identifier assigned to the user-defined system level constant. Names can be up to 40 alpha numeric characters and allowed special characters. Names must be unique.

Data Type: Data types cannot be edited once the user-defined system level constant has been saved. If you have made a mistake with the data type, you must create a new user-define system level constant. The incorrect user-define system level constant can be deleted if it is not in use.

Value: A user created value for the user-defined system level constant. The value must be compatible with the data type.

1. From the menu bar, click New to open the New System-level Constants screen. The selection does not matter. Only User-defined constants can be created.

2. Enter in a **Name**. Names can be up to 40 alpha numeric characters and allowed special characters. If a naming standard is in place, a naming pattern is displayed in the name field. If the

naming standard is mandatory, an error message is presented if your entry does not follow the pattern. Correct your entry and try again. Names must be unique.

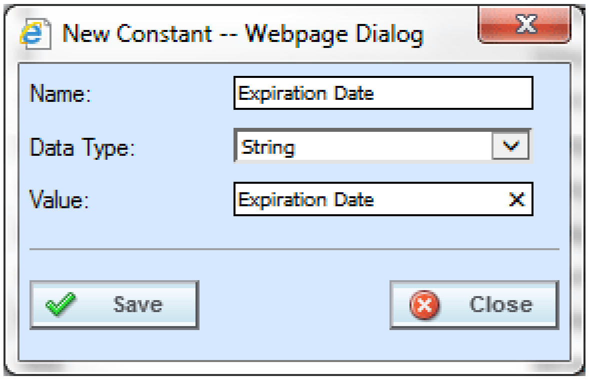


Figure 18 New System-level Constant

3. Select a **Data Type** from the menu. Data type cannot be edited once saved.

4. Enter the Value. The value you can enter depends on the data type.

   - Integers – Values can be up to 21 numeric digits.
   - String – Values can be up to 50 alpha numeric characters and allowed special characters.
   - Decimal – Values can be up to 50 numeric digits with a single decimal point.
   - Date – Values can be up to 50 alpha numeric characters and allowed special characters.

5. Enter the details.

6. Click Save to save your entry.

Edit a System Level Constant

User-defined System Level Constants can be edited at any time. The name and value fields are open for editing. Data type cannot be edited. If you have made a mistake with the data type, you will have to create a new constant with the correct data type.

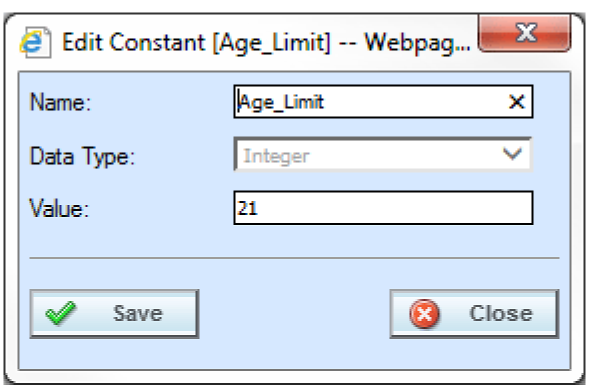


Figure 19 Editing a System Level Constant

1. On the System Level Constant screen, select User-defined to view the user-defined System Level Constants.

2. Select the System Level Constant that you want to edit.

3. Click Edit. Make any changes to the **Name** and **Value**. If the naming standard is mandatory, an error message is presented if your entry does not follow the pattern. Correct your entry and try again.

4. Click Save to save your entry.

NOTE: *Please take care when editing or deleting user-defined constants. When values are updated, the updates will affect every program where that constant is being used. The update happens at the time of packaging. This action may cause unintended changes in other programs. To see where the user-defined constant is being used, run a Where Used report.*

Search for a System Level Constant

The find option searches the name field for both pre-defined and user-defined system level constants. You can search for the exact name or for the beginning characters of a system level constant. Results returned contain the entire search criteria. For example, if you search for ABC, all names that start with ABC are returned along with the system level constant called ABC. Searches are not case sensitive.

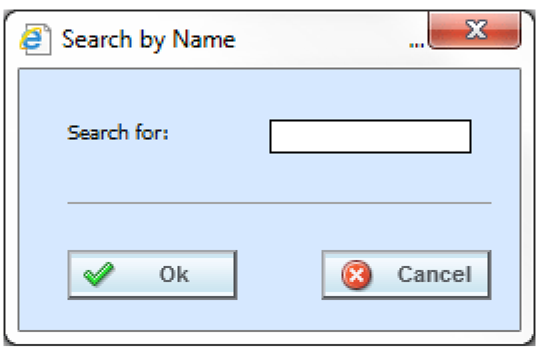


Figure 20 Searching for a System Level Constant

1. From the System Level Constants screen, select the type of system level constant you want to locate either pre-defined or user-defined.

2. Click Find to open the search screen.

3. Enter the name or first few characters of the system level constant you want to search for.

4. Click Ok.

5. Results are displayed in the System Level Constant screen.

6. To clear search results, select the type of system level constant you want to view. This returns all entries to the screen.

View Where a System Level Constant is Used

View Where used is helpful when you want to see where a System Level Constant is being used. Pre-defined System Constants do not have Where Used reports.

1. On the System Level Constant screen, select User-defined to view the user-defined System Level Constants.
2. Select the System Level Constant that you want to see where it is being used.
3. Click Where Used. Results are displayed in a Where Used Report.
4. Click Close to close.

Delete a System Level Constant

User-defined system level constants that are not in use can be deleted. If a user-defined system level constant is being used, you must clear it from being used. Make sure this is the action you want to take. This action cannot be undone. Pre-defined System Constants cannot be deleted.

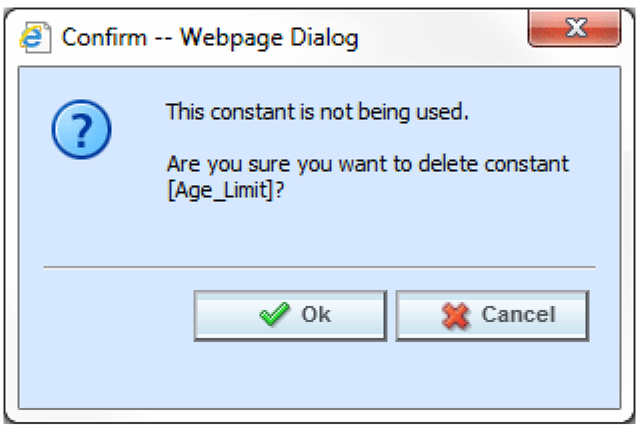


Figure 21 Deleting a User-defined System Level Constant

1. From the System Level Constants screen, select User-defined to view the user-defined System Level Constants.
2. Select the System Level Constant you want to delete and click Delete.
3. A confirmation screen is displayed. Click Ok to delete the System Level Constant. Click Cancel to return to the previous screen.
4. Deleting removes the System Level Constant immediately.

System Level Constants Rights

Permissions are required to create, edit, or delete system level constants. Users with Domain Access rights will have permissions to work on system level constants. Permissions are set at the group level. If you do not have permission, please contact your system administrator.

Updates to system level constants are logged as audit items if auditing has been enabled for the user group.

Viewing System Level Constants

If you do not have permissions to create, edit or delete system level constants, you can view the details. The options on the screen are limited to refresh, where used and find.

MESSAGE TEMPLATES

The Message Templates screen is where message templates can be created and managed. Message templates are user created messages consisting of fixed values and system values that are defined at the system level and available to all lines of business and sub-lines.

Creating message templates at the system level allows for re-usable message definitions with optional variable substitution that can be used in every program no matter the line of business, and creates a uniform appearance and message content.

There are two types of message templates:

- **Pre-defined:** There is one pre-defined message template in RateManager. This is a blank template that allows for user-created messages to be used. This template message is built in to the Insbridge system and cannot be edited, or deleted.
- **User defined:** User-defined message templates are created by system users and are prefabricated messages with variable placeholders that allow you to create standard messages using variable information that is generated at the time of execution.

Message Template Structure

Message templates can be simple messages with one or more placeholder values. Or longer messages with one or more placeholder values. The structure is determined by you.

For example:

If you want to output a message “As of December 2016, Alamere no longer insures drivers over the age of 100 with a coverage limit of $100,000.,” you can begin by typing it in.

Next, replace the items that may change. If one program will change in December but another will change in January, delete the date and click **Insert** to put in a placeholder. If the company name will change, delete the name and click Insert to put in a placeholder.

Continue until you have the template that you want with the placeholders that you need.

“As of [?], [?] no longer insures drivers over the age of [?] with a coverage limit of [?].”

This structure allows you to insert the date field you need, along with the company name, driver age, and coverage limit that applies. You do not need to create multiple messages. You can create one message that can be used against multiple programs.

Message Template Listing

Message Templates can be used in calculated variables, algorithms and drivers assignments.

In the Available Variables, Functions and Constants list, message templates are listed first followed by system level constants, domain constants and variables last.

Navigating to Message templates

There are two ways to access Message templates.

- Message templates can be accessed by clicking the Message Templates icon on the Home tab.
- Tools→Setup→Message Templates. This opens the Message Templates window.

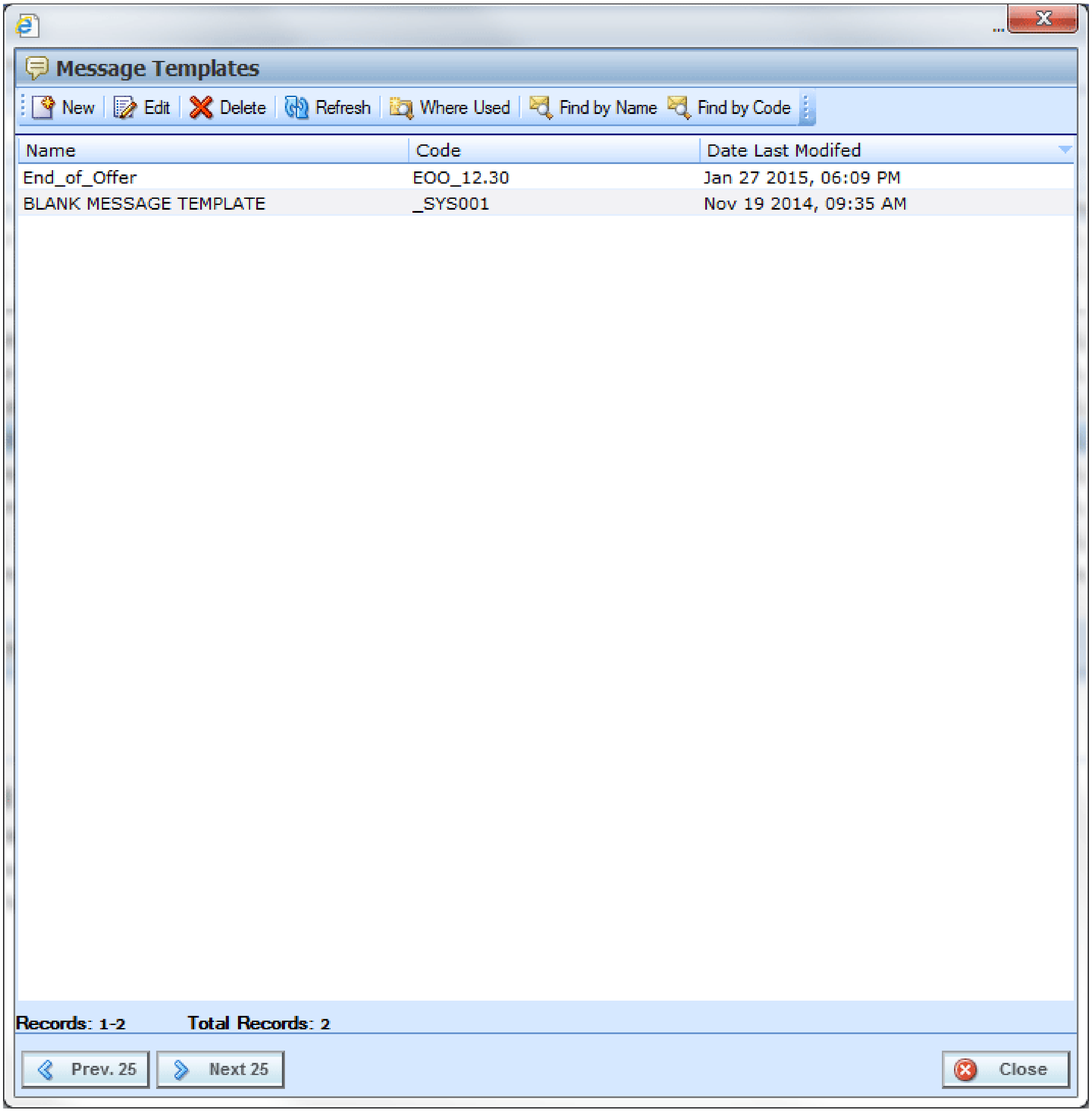


Figure 22 Message templates

MESSAGE TEMPLATES FUNCTIONALITY

	**New:** New starts the process of creating a new user defined message template.

	See Creating a New Message Template for more information. Pre-defined message templates cannot be created.
Edit	**Edit:** Opens the Edit Message Template screen for the currently selected message template. Pre-defined message template cannot be edited.
Delete	**Delete:** Removes the selected message template from the list. Pre-defined message template cannot be deleted.
Refresh	**Refresh:** Refreshes the list of message templates.
Where Used	**Where Used:** Shows a Where Used report indicating where the selected message template is used.
Find by Name	**Find by Name:** Searches the Name field in the currently displayed message templates for the value entered in the search field and returns with a list of matching results. Searches are case sensitive.
Find by Code	**Find by Code:** Searches the Code field in the currently displayed message templates for the value entered in the search field and returns with a list of matching results. Searches are case sensitive.

Message Templates Fields

Message templates are listed in date last modified order with the total number of message templates displayed on the bottom of the screen. Paging options are available when the listing exceeds 25.

The listing can be sorted by Name or Code. Click the title that you want to sort on to view message templates in that order.

- **Name:** A unique, user defined name for the message templates. Names cannot be duplicated by any other message template or constant.
- **Code:** A user-defined value can be assigned as a code.
- **Date Last Modified:** The date the last modification was made to the message template.

Message Templates Right Click Menu

There are no Message templates right click menus.

Message Templates Functionality

The Message templates screen allows you to:

- Create a New Message Template
- Edit a Message Template
- Search for a Message Template
- View Where a Message Template is Used
- Delete a Message Template

Creating a New Message Templates

Message templates can be created at any time. All fields are required.

Message Templates Descriptors

Name: A user created identifier assigned to the message template. Names can be up to 40 alpha numeric characters and allowed special characters. Names must be unique in message templates and message templates.

Code: A user created identifier assigned to the message template. Codes can be up to 40 alpha numeric characters and allowed special characters. Codes must be unique in message templates.

Message Text: A user created message that allows for system variables to be inserted. Message text can be 500 alpha numeric characters and allowed special characters.

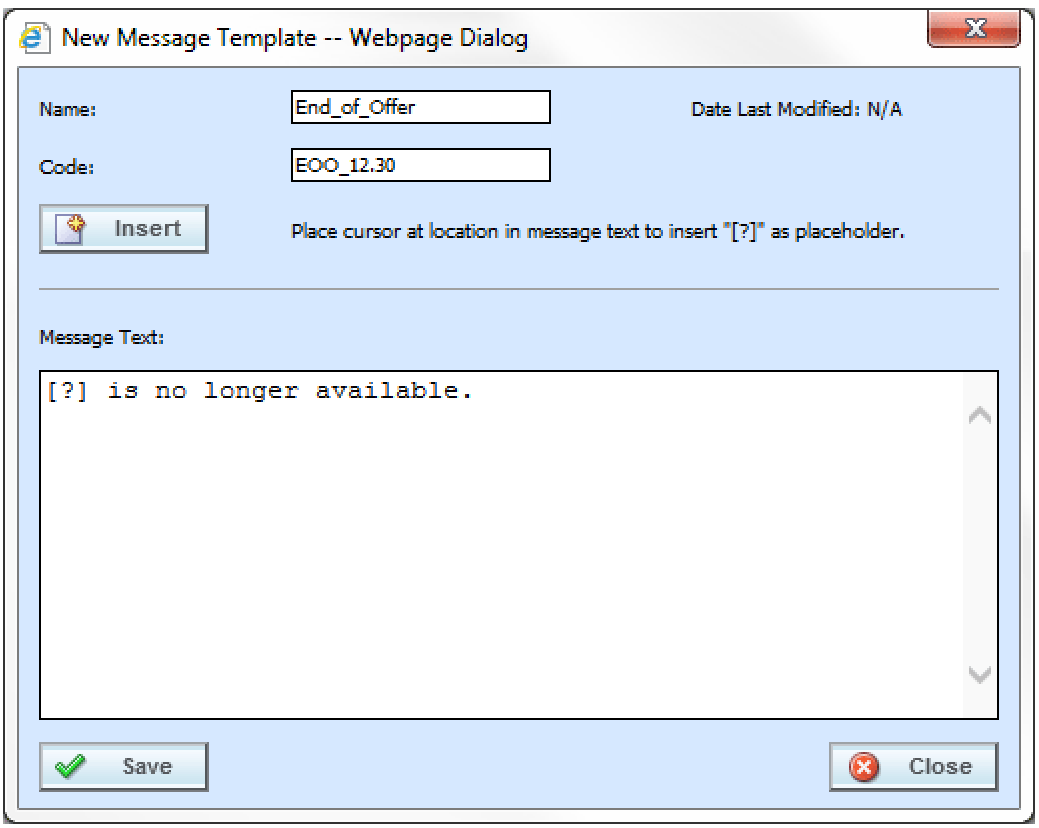


Figure 23 New Message Templates

7. From the menu bar, click New to open the New Message Templates screen.
8. Enter in a **Name**. Names can be up to 40 alpha numeric characters and allowed special characters. If a naming standard is in place, a naming pattern is displayed in the name field. If the naming standard is mandatory, an error message is presented if your entry does not follow the

pattern. Correct your entry and try again. Names must be unique to message templates and constants.

9. Enter in a **Code**. Codes can be up to 40 alpha numeric characters and allowed special characters.

10. Enter the **Message Text**. Type the message that you want to output. Where you want to insert any system variables, click the Insert button. A [?] placeholder is inserted.

11. Click Save to save your entry. If you close without saving, your entry will not be saved and you will not receive a warning message.

Edit a Message templates

Message templates can be edited at any time. All fields are open for editing.

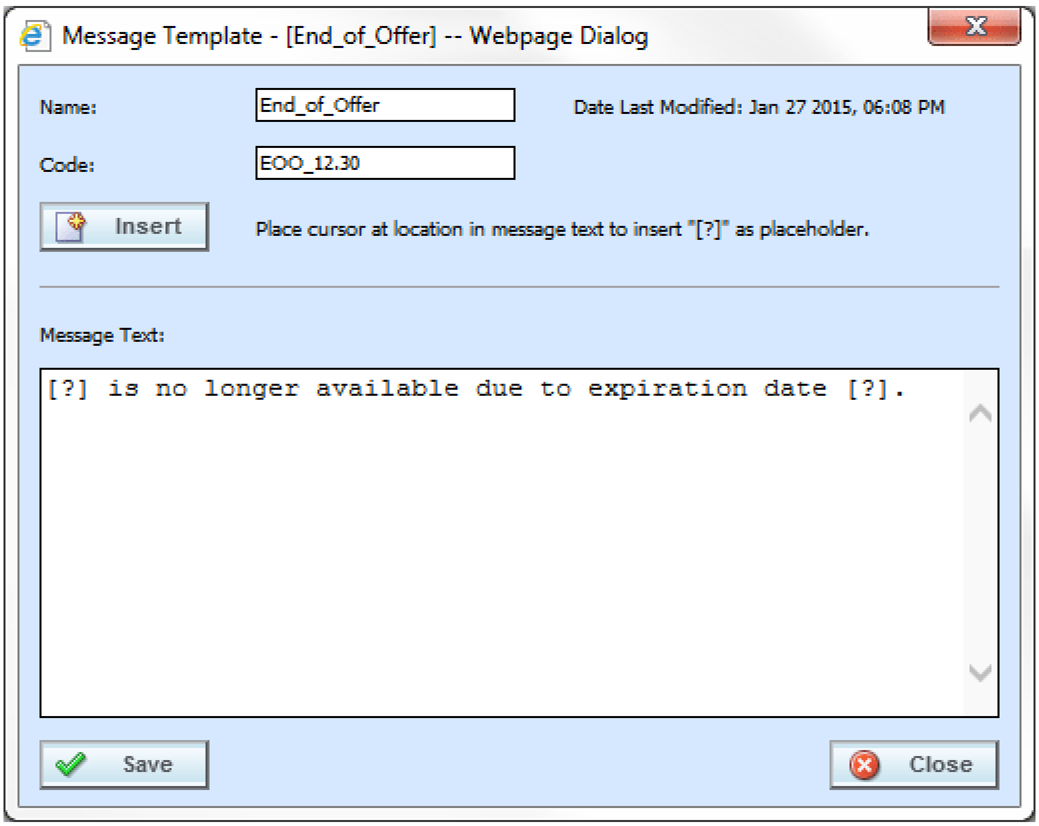


Figure 24 Editing a Message Template

5. Select the Message templates that you want to edit.

6. Click Edit. Make any needed changes. If the naming standard is mandatory, an error message is presented if your entry does not follow the pattern. Correct your entry and try again.

7. Click Save to save your entry.

NOTE: *Please take care when editing or deleting message templates. When values are updated, the updates will affect every program where that message template is being used. The update happens at the time of packaging. This action may cause unintended changes in other programs. To see where the message template is being used, run a Where Used report.*

Search for a Message Template

There are two find options. One searches the name field and the other searches the code field for both pre-defined and user-defined message templates. You can search for the exact name or for the beginning characters of a message template. Results returned contain the entire search criteria. For example, if you search for ABC, all names that start with ABC are returned along with the message templates called ABC. Searches are case sensitive.

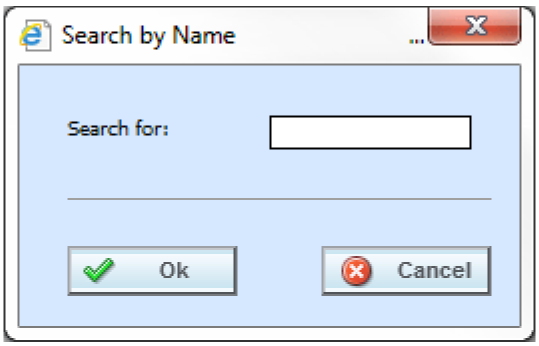


Figure 25 Searching for a Message Template by Name

7. Depending on the type of search you want to perform, click Find by Name or Find by Code to open the search screen.
8. Enter the full name or code or just the first few characters for the message templates you want to locate.
9. Click Ok.
10. Results are displayed in the Message Templates screen.
11. To clear search results, click Refresh to return all entries to the screen.

View Where a Message Template is Used

View Where used is helpful when you want to see where a message template is being used.

5. Select the message template that you want to see where it is being used.
6. Click Where Used. Results are displayed in a Where Used Report.

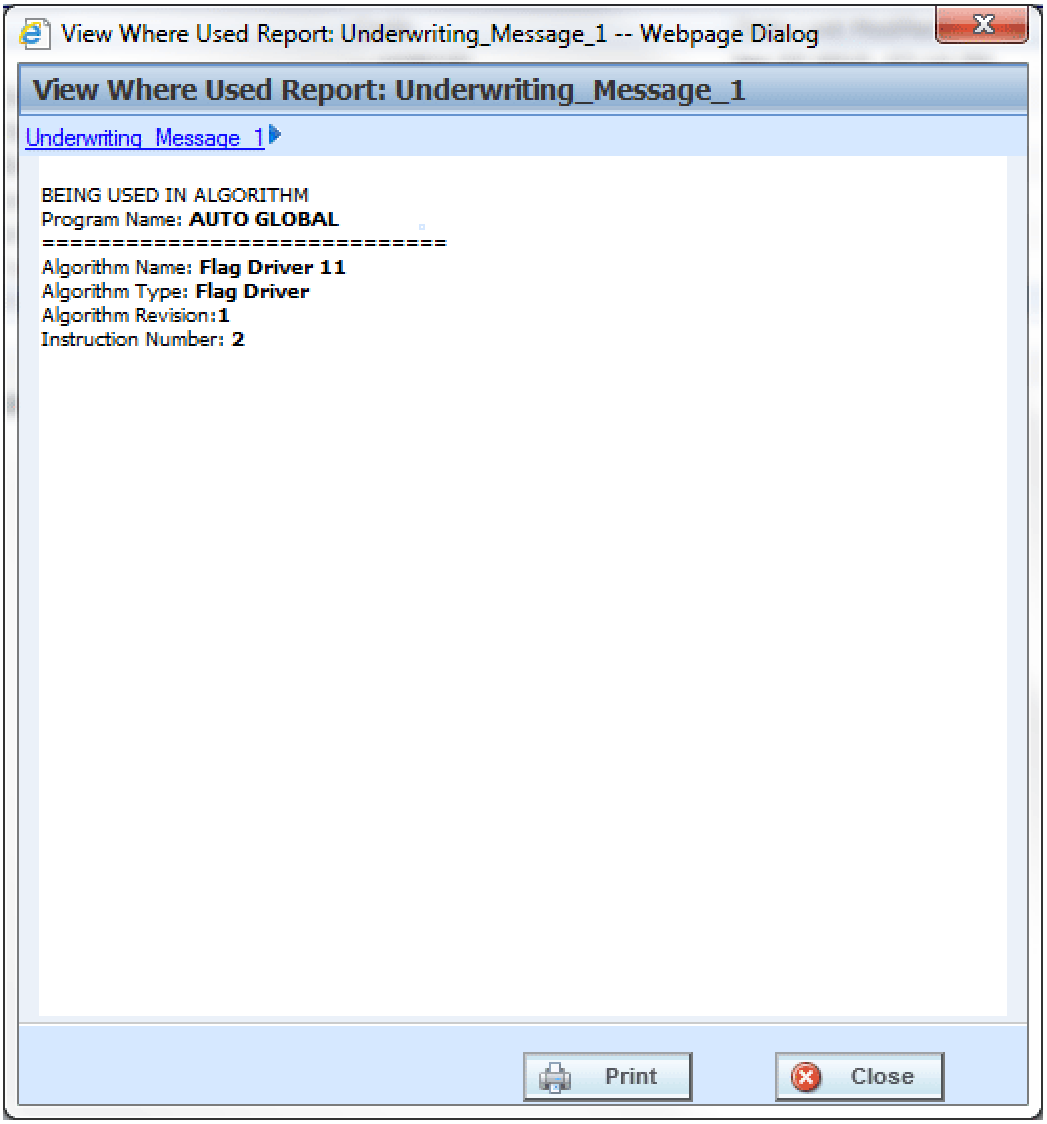


Figure 26 Message Template Where Used Report

7. Click Close to close.

Delete a Message Template

Message templates that are not in use can be deleted. If a message template is being used, you must clear it from being used. Make sure this is the action you want to take. This action cannot be undone. Pre-defined message templates cannot be deleted.

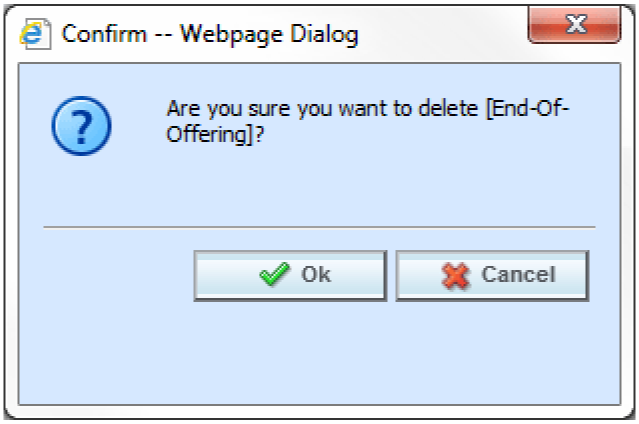


Figure 27 Deleting a Message Template

5. From the Message Templates screen, select the message template you want to delete and click Delete.
6. A confirmation screen is displayed. Click Ok to delete the message template. Click Cancel to return to the previous screen.
7. Deleting removes the message template immediately.

Message Templates Rights

Permissions are required to create, edit, or delete message templates. Users with Domain Access rights will have permissions to work on message templates. Permissions are set at the group level. If you do not have permission, please contact your system administrator.

Updates to message templates are logged as audit items if auditing has been enabled for the user group.

Viewing Message Templates

If you do not have permissions to create, edit or delete message templates, you can view the details. The options on the screen are limited to refresh, where used and find.

Message Templates in Use

Message templates are user created messages consisting of fixed values and system values that are defined at the system level and available to all lines of business and sub-lines.

Message templates can be used as a step in any calculated variable, algorithm or driver assignment. Message templates are brought in with text and placeholders where users can assign a variable, function, result or step or constant to be used at execution.

1. Select the calculated variable, algorithm or driver assignment where you want to use a message template.

2. Select Message Templates from the Available Variables, Functions, and Constants.

3. Available message templates will be listed.

4. Select the message template you want.

5. The message template is listed as a step.

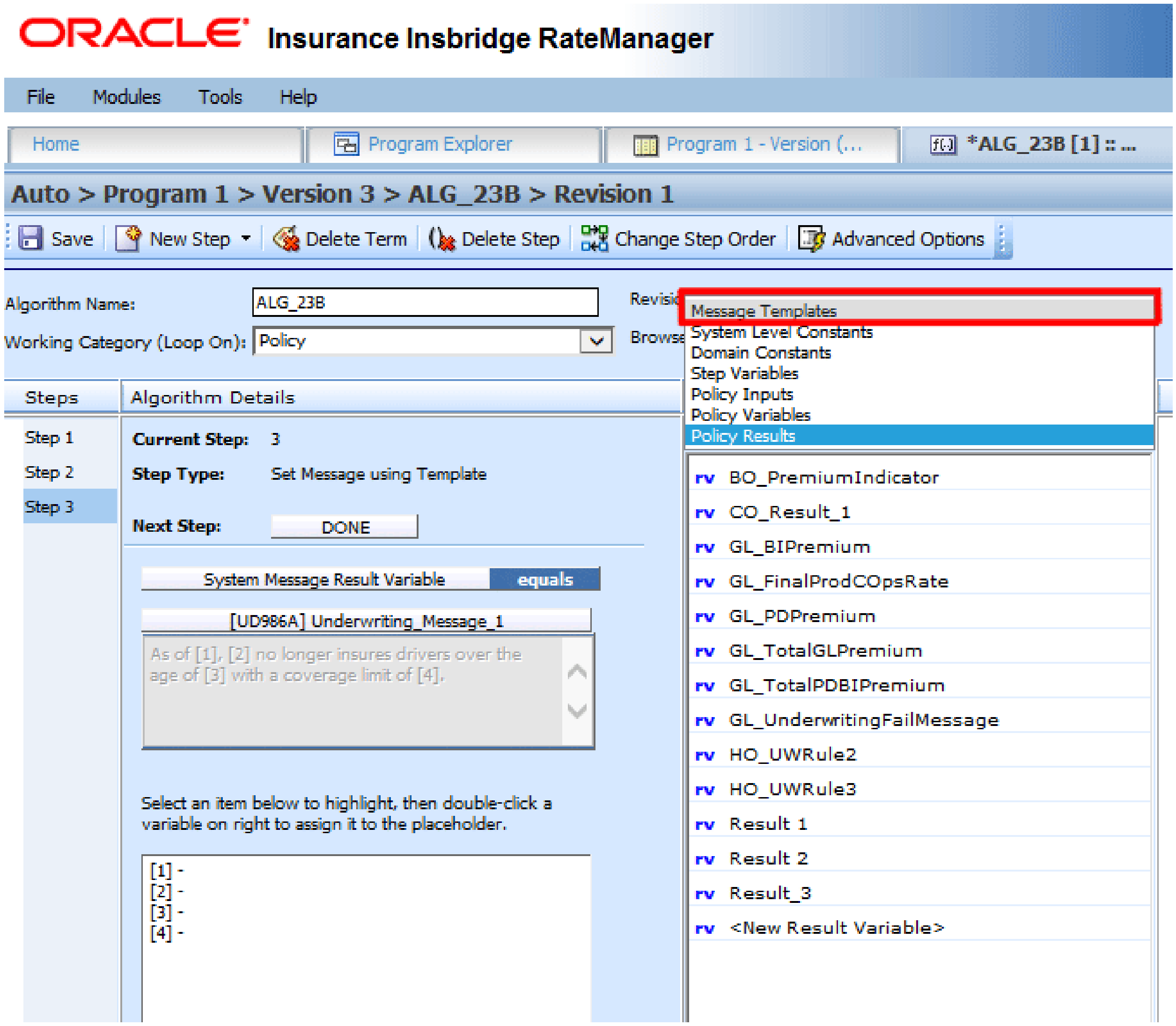


Figure 28 Message Templates

6. You must match up the placeholders [1] with available variables, function, results of step or constants. Select the placeholder and then select the appropriate variables, functions, constants or inputs that you want to use.

7. Continue until all placeholders have a value assigned.

8. When you are finished, click Save to save your entry.

REPORTS

The IBRM database is the repository for content created in RateManager. Data is stored in a proprietary format that cannot easily be extracted and evaluated by a reporting tool. The Reports feature allows for access to the IBRM data in a relational data structure and format that can be used for reporting.

Provided is detailed documentation that describes what data is available, the relationships of all data elements, how the data should be accessed, and a sample report that can be created using the available data.

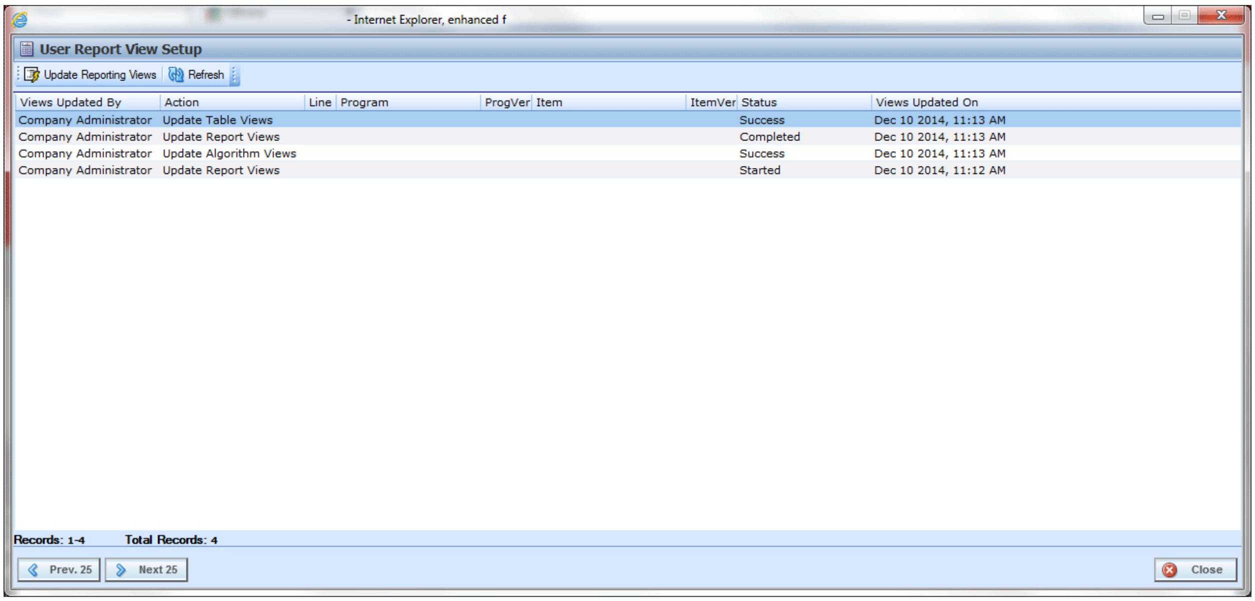


Figure 29 Design Time Report Updates

There are two menu options:

Update Reporting Views	**Update Reporting Views:** Reconciles the RateManger design time reporting database.
Refresh	**Refresh:** Refreshes the list of report updates.

Report Rights

Permissions are required to update RateManager design time reports. Users with Domain Access rights will have permissions to update reports. Permissions are set at the group level. If you do not have permission, please contact your system administrator.

Updates to reports are logged as audit items if auditing has been enabled for the user group.

MANAGE LINES

The Manage Lines of Business (LOB) screen gives you a snapshot of all the lines of business currently in the system and shows if the line is activated or deactivated. RateManager comes with 32 system lines.

Lines of business should be setup prior to creating non-admin users. If you create regular users without any lines being activated in the system, you will have to return to the Group Management screen to assign permissions.

NOTE: *Manage Lines is available to users with Line Management permissions. If you do not have permissions, you will not be able to access the Manage Lines screens.*

Manage LOB Screen

Managing LOBs is done on the Manage LOB screen available from the Tools Menu->Manage Lines.

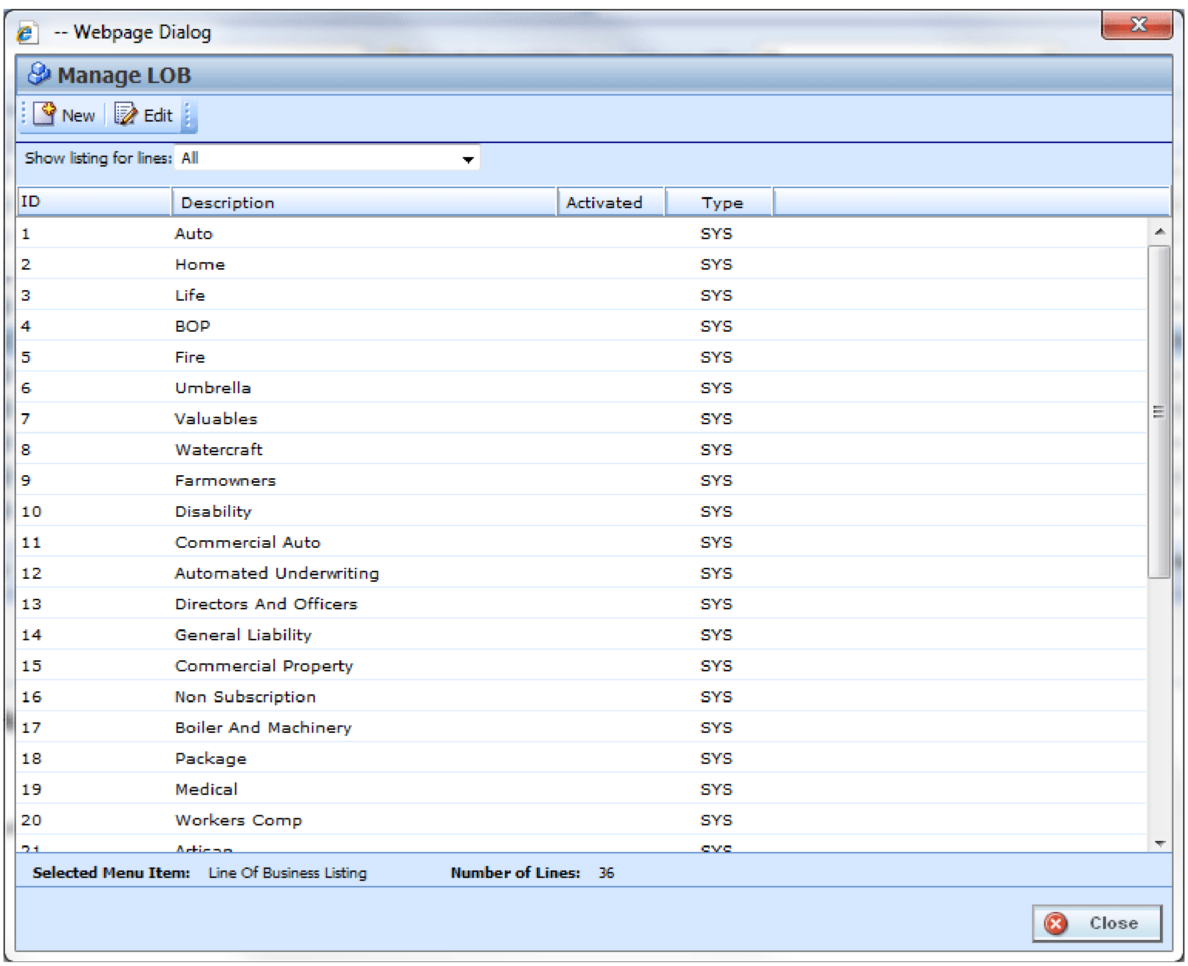


Figure 30 Manage LOB Screen

If you do not have the Manage Lines option available from the Tools menu, you do not have permissions. Please contact your system administrator to get access.

Manage LOB Functions

The menu bar at the top of the screen allows you to:

New	**New:** New starts the process of creating a new line of business. See Creating New Lines of Business for more information.
Edit	**Edit:** Opens the Edit Line of Business Info screen for the currently selected line of business.
	Show listing for lines: Allows you to view LOBs by activation status. Select the status you want to view from the drop down menu. - **ALL:** Selecting ALL displays all of the lines currently in the system. - **Activated:** Selecting activated displays only the currently activated lines. - **Deactivated:** Selecting deactivated displays only the deactivated lines All is the default selection. If you choose another selection, the screen refreshes with your choice.

Manage LOB Fields

Lines are listed by ID number. The total number of lines in the system, both activated and deactivated, is displayed on the bottom of the screen.

- **ID:** The unique identifier assigned to each line of business. Once assigned, these numbers cannot be changed.
- **Description:** The name of the line of business. Names must be unique. Duplicates are not allowed.
- **Activated:** A check in this column indicates that the line of business has been activated and is ready for use.
- **Type:** Shows whether the line is:
  - **System** built. System built lines of business are the standard lines included in the Insbridge application. System lines cannot be deleted but can be edited.
  - **Custom** built. Custom built lines of business are user created lines. Custom line can be edited and deleted.

Manage Lines Functionality

The Manage Line of Business screen allows you to do the following:

- Create a New Line of Business
- Edit a Line of Business
- Activate a Line of Business
- Deactivate a Line of Business
- Remove All Programs from a Line of Business
- Delete Custom Lines of Business

NOTE: *System lines of business cannot be deleted. If there is a System line of business you no longer need, you can deactivate it. This stops the line from being listed and being available. Custom lines can be deleted.*

LOCALE

Prior to creating a new line or activating a line, you should have the locale you want to use in mind. Locale is defined as the unique attributes of a location including formatting of dates and numbers. The default locale, including a date and number format, is the locale used by the server where the Insbridge system was installed.

The Insbridge server locale is used as the default locale for every LOB. The LOB locale can be changed to another locale. The default locale for the LOB is the default locale for every program in that LOB, regardless of subline. The program locale can be updated to another locale. The locale used by the program, either another local or the default locale, is the locale that will be used in rating.

Selecting a Locale

There are two places where you can select the locale:

- LOB level
- Program level: For more on Program Locale, please see the RateManager Modules Volume 1 User Guide.

Creating a New Line of Business

Custom lines may be added at any time by any user with Line Management permissions. You cannot create a system line.

Line Descriptors

ID: A required numeric identifier. LOB ID numbers can be entered manually. This allows you to match any LOB that may be Custom from the Library. LOB ID numbers must be an unused number between 100 – 250. If the number is out of range or being used, you will receive an error message. LOB IDs cannot be changed after you save. If you made a mistake with the number, you will have to delete the entry and re-enter. If you do not enter a value, the next available number is assigned.

Name: A user created identifier assigned to each LOB. Names can be up to 40 alpha numeric characters and allowed special characters. Names must be unique. This is a required field.

Abbreviation: A two alpha character identifier code. This optional entry is used with crossline P2P result variables to identify the source LOB. System lines have a default code that can be edited.

Locale: The New Line of Business screen and the Edit Line of Business screen contain a drop down of available locales. The default locale is the locale used by the sever where the Insbridge system is installed. A Locale must be selected. You can leave the default or select a different locale when you activate a system LOB, edit an LOB, create a new LOB, create a new program, or edit the program properties.

If you do not select a locale, the default will be used. The Date Mask, the Decimal Symbol, and Digit Grouping Symbol are automatically filled with the defaults. These values can be updated and you can type in an alternate value if you choose. You must have a value in the Date Mask, Decimal Symbol, and Digit Grouping Symbol fields.

The values set at the LOB level serve as the default locale to every program created in the line regardless of subline. If the program requires a different local, you can change the locale at the program level.

To verify a locale, open the Edit the Line of Business screen. The selected locale for the LOB is listed here.

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

Dates must contain:

- 2 digit Month entry MM
- 2 digit Day entry DD
- 4 digit Year entry YYYY or a 2 digit Year entry YY
- One of 3 separators minus sign (-), period (.) or slash (/) Special characters are not allowed. The list of special characters can be found the RateManager Modules Volume 1 User Guide.

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

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

Decimal Symbol and Digit Grouping Symbol: The number formatting is the default number format from the selected Locale. Number format refers to the decimal and digit separators found in common number formats, for example, 1,000.00 or 10.000,00.

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

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

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

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

- Most separators, i.e. comma (,), period (.), or space ( ) are allowed. The special characters apostrophe ('), pound (#), ampersand (&), quote ("), less than (<), and greater than (>) are allowed. A complete list of special characters can be found the RateManager Modules Volume 1 User Guide.
- You cannot use the same separator for the decimal and digital. The separators must be different.
- Only one separator per entry. You cannot enter a space ( ) for the millions separator and then a comma (,) for the thousands separator. You have to select either the space or the comma.

Line Activated: A check indicates that the line is active. Active lines can have user groups assigned and will be displayed to users with permissions.

Naming Standard: You can select a naming standard to every subline in the line. This optional feature allows you to enforce a uniform naming structure to system elements and programs. Please see Naming Standards for more information.

If a naming standard is needed, it can be created prior to the line being created.

Creating a New Line of Business

When creating a new line of business, access is denied to all users except administrators. After creating the line, you need to add user group permissions to the line. If the line does not present to users, the user group does not have permissions to work in the line.

Step 1: Creating the Line

1. Navigate to the Line of Business screen from the Tools menu->Manage Lines.
2. Click **New**. A New Line of Business popup is shown.

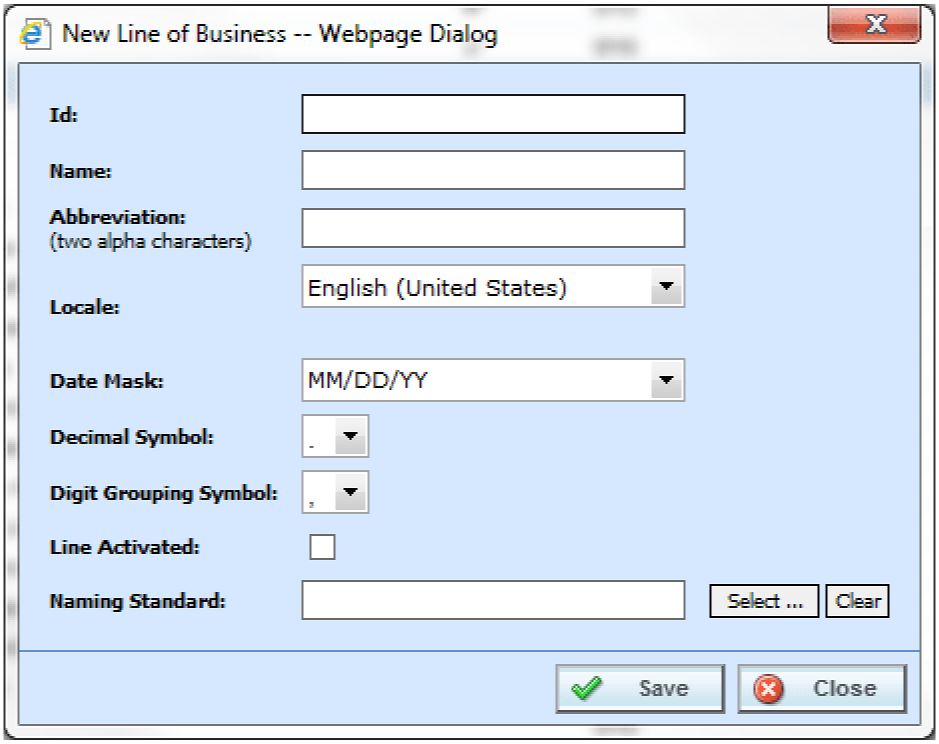


Figure 31 Entering a New Line of Business

3. In the new line of business popup, enter an **ID number**.
4. Enter a **name**. The name can be up to 40 characters in length including spaces.
5. Enter a two character **abbreviation**.
6. Select the **locale**.
7. If needed, select a **date mask**.
8. Select the **Decimal Symbol**.
9. Select the **Digit Grouping Symbol**.
10. By clicking the **Activated** checkbox, the line of business will be activated after saving.
11. If needed, select a Naming Standard.
12. Click **Save**. All groups except Administrators are denied access to any new line of business. A RateManager administrator must allow group access before the line is available to users.

Step 2: Adding User Group Permissions to a New Line

13. Navigate to Tools→Security→Group Management to set permissions. This allows groups access to view or edit variables, algorithms and other program options.

NOTE: *Adding a line to group permissions needs to be done for a first time activation only. If you* *deactivate and then activate again, you will not need to reset permissions.*

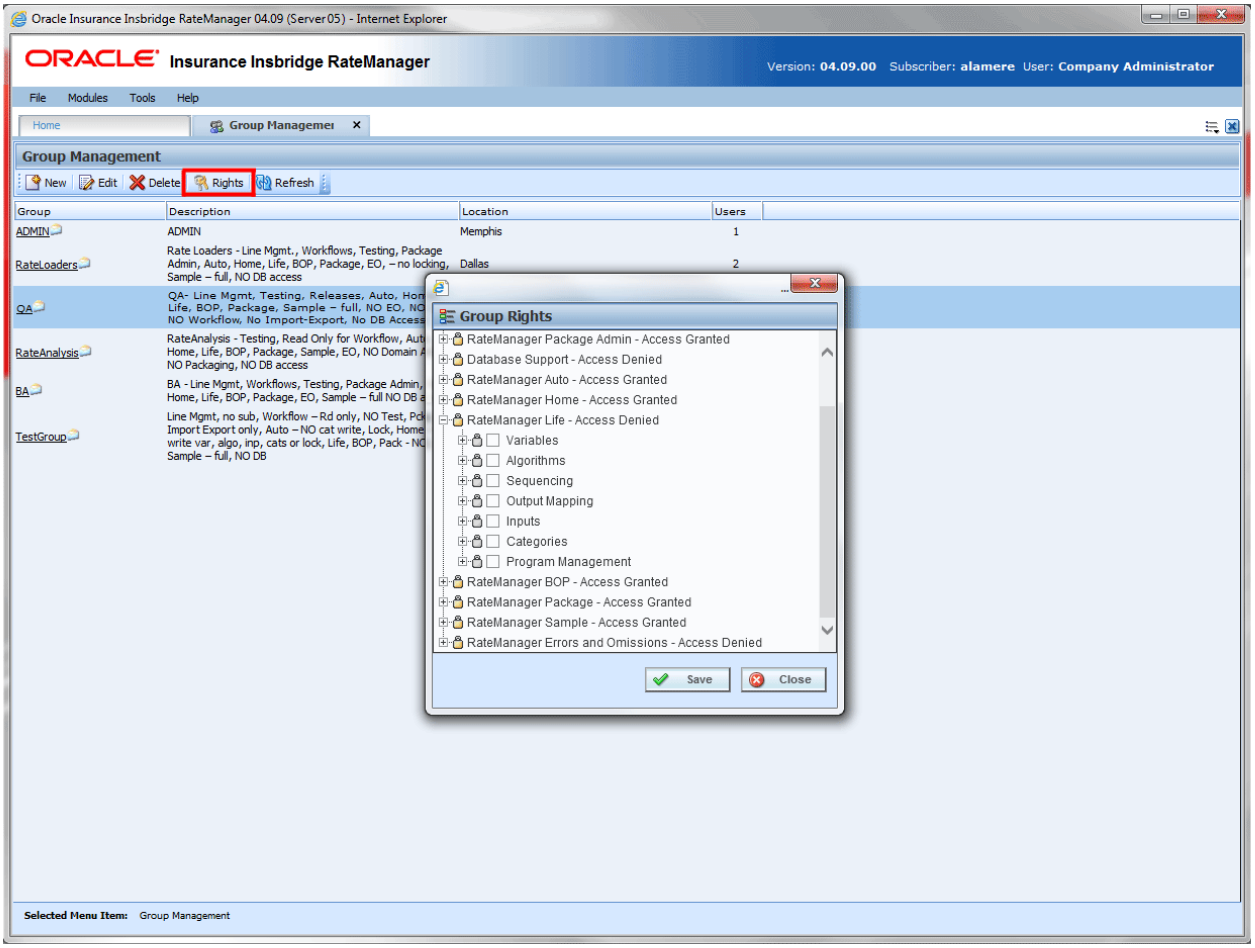


Figure 32 Setting Security for New Lines of Businesses

14. Select the group that needs access to the new line of business.

15. Click on **Rights**. A Group Rights screen is displayed. Expand out the new line of business.

16. Place a check in all the boxes where the group requires access. Click **Save**. Users in that group can now view and use the selected options. For more on user groups and rights, see Group Management.

The line of business, if activated, is displayed for the selected user group in the Program Explorer→Program Folders navigation bar. If the line does not appear, click Reload to apply the updated settings.

Editing a Line of Business

Any line of business may be edited at any time.

1. Navigate to the **Line of Business** that you want to edit.

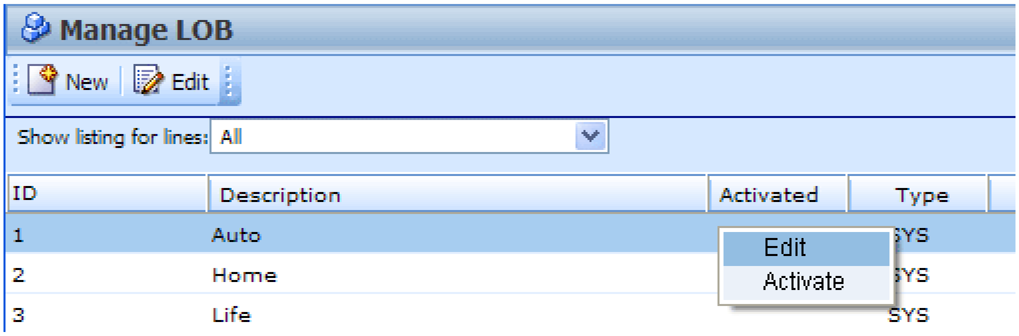


Figure 33 Selecting a LOB to Edit

2. You can double-click the line of business you want to edit or select it and click **Edit**. You also can right click and select Edit from the menu. The **Edit Line of Business Info** popup opens, allowing you to edit the line of business.

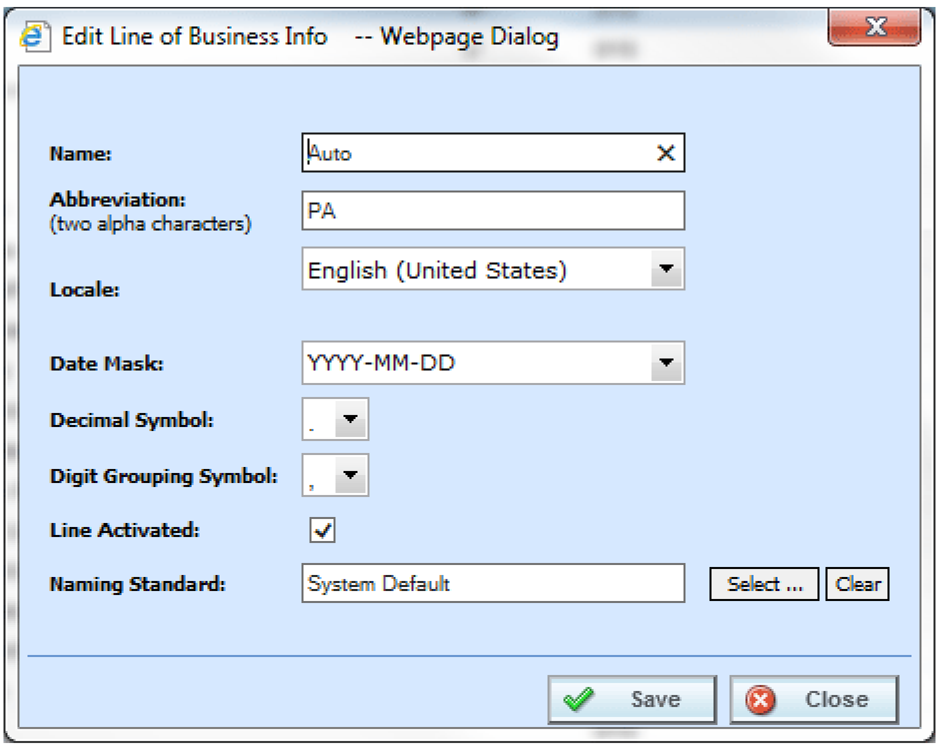


Figure 34 Editing an LOB

3. Make any necessary changes. Every field can be edited.

4. When you are finished, click **Save**. The line of business screen refreshes with the changes you made. Click Close to go back to the Manage LOB screen without saving any changes.

Updating a Locale

Updates to Locale at the LOB level affect new programs. Existing programs are not affected by updates. Existing programs already have a locale set at the program level.

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

Updating a Naming Standard

Updates to Naming Standard at the LOB level will apply to all new programs. Existing programs will not be affected by an updated Naming Standard unless edited. When existing programs and elements are edited, the name entry is validated against the current Naming Standard option. Users may be required to make changes to the name to meet selected naming standards.

Activating and Deactivating a Line of Business

Any line of business may be activated or deactivated at any time. Activating a line of business displays the line and all associated programs on the Program Explorer→Program Folders navigation bar for users with group permissions to work in the line. Deactivating a line of business removes the line and all associated programs from the Program Explorer→Program Folders navigation bar.

You can activate and deactivate a line as many times as you need. Permissions and contents are not removed when a line is deactivated. If you reactivate, the permissions and contents are the same.

1. Navigate to the **Line of Business** that you want to activate or deactivate.

2. **Right click** to get the menu. For a System line, a deactivated line has two right click menu options; an activated line has three menu options. For a Custom line, a deactivated line has three right click menu options; an activated line has four menu options.

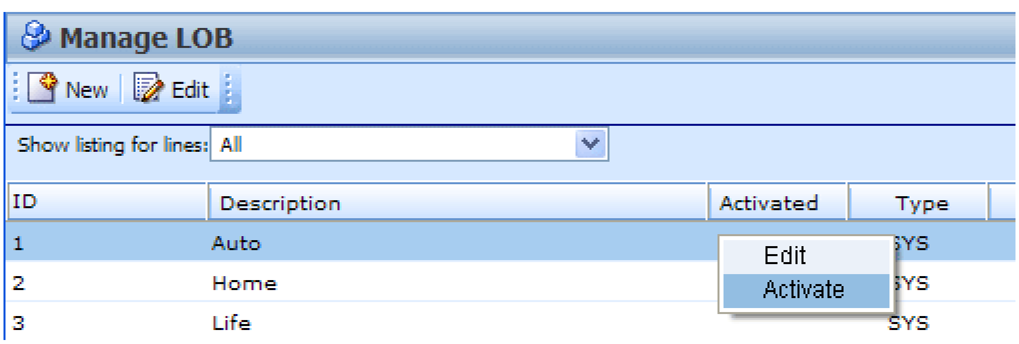


Figure 35 Selecting a LOB to Activate

3. To activate: Click **Activate**. The screen refreshes and the line of business that you activated is now displayed on the Program Explorer→Program Folders navigation bar. You also can activate a line of business by entering the edit screen and selecting Activated.

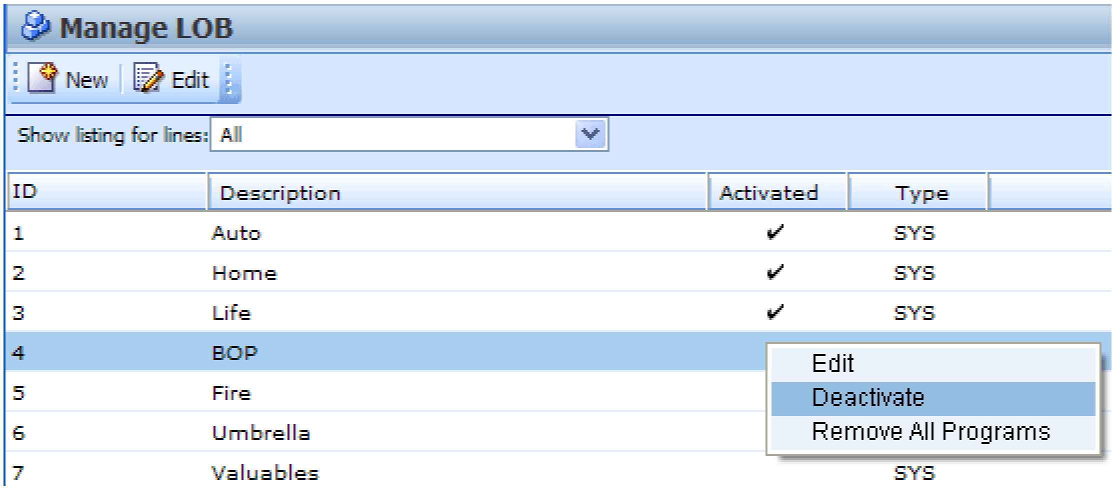


Figure 36 Selecting a LOB to Deactivate

4. To deactivate: Click **Deactivate**. The screen refreshes and the line of business that you deactivated is not displayed on the Program Explorer→Program Folders navigation bar.

Removing All Programs from Line of Business

Any line of business can have all programs removed. Proceed with care, this action cannot be undone and will remove all programs under that line. The sublines remain in place and all globals under each subline also remain. If you are unsure, you can deactivate a line of business. This removes the programs from usage but not from the system. If you want to remove the subline, use the Clear Subline option on the Program Explorer.

1. Navigate to the **Line of Business** where you want to remove all programs.

2. **Right click** and click **Remove All Programs**. A warning message will be displayed. Click **Yes** to remove all programs. Click **No** to cancel the action.

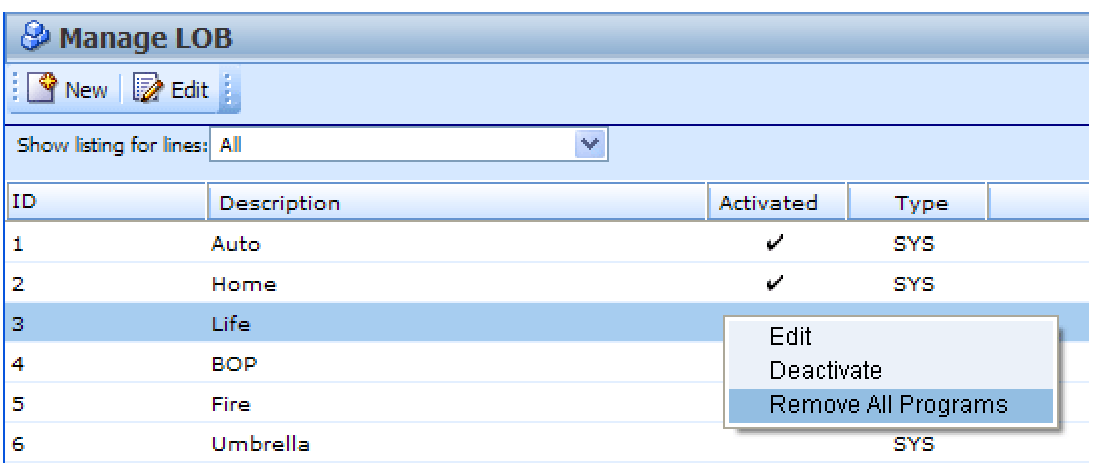


Figure 37 Removing All Programs from an LOB

Deleting a Custom Line

Custom lines can be deleted at any time. All associated contents for the line are deleted as well. Please verify this is the action you want to take. This action cannot be undone. Two warnings are given. You will need to refresh the screen to see that the line has been deleted.

1. Navigate to the custom **Line of Business** you want to remove.

2. **Right click** to get the menu.

3. Click **Delete**. A warning message is displayed. Click **OK** to remove the line. Click Cancel to cancel the action. A second warning message is displayed. Click **OK** to remove the line.

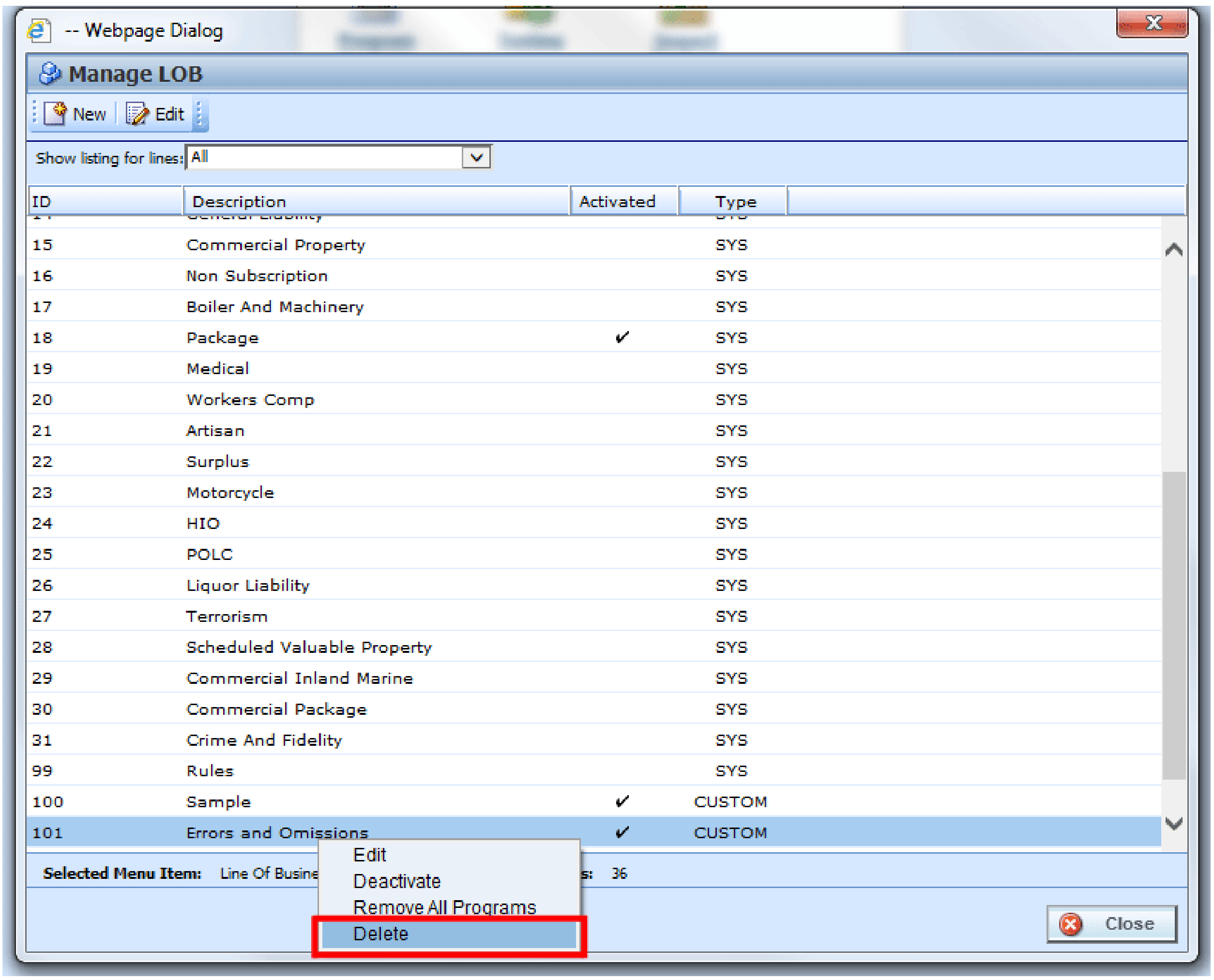


Figure 38 Removing All Programs from an LOB

AUDIT

RateManager can keep an audit log of user activity. Audit logs contain information such as action performed, user ID, date and time stamp. Audits set to high will also track adding a user, editing a user and deleting a user. Audit logs also can include program information such as program ID, program version and line of business as well as element information.

The **Audit** tab contains a list of audits logs. The audit log feature has to be enabled at the group level. On the Group Management tab, Tools→Security→Group Management, select the group where you want to apply auditing. There are three options for auditing the group:

- **None:** No auditing is done.
- **Normal:** All saves and deletes are logged.
- **High:** All new, creates, changes, saves, and deletes for the group are logged.

If the group(s) has high auditing, more audit logs are created and you will have more types of actions you can filter on.

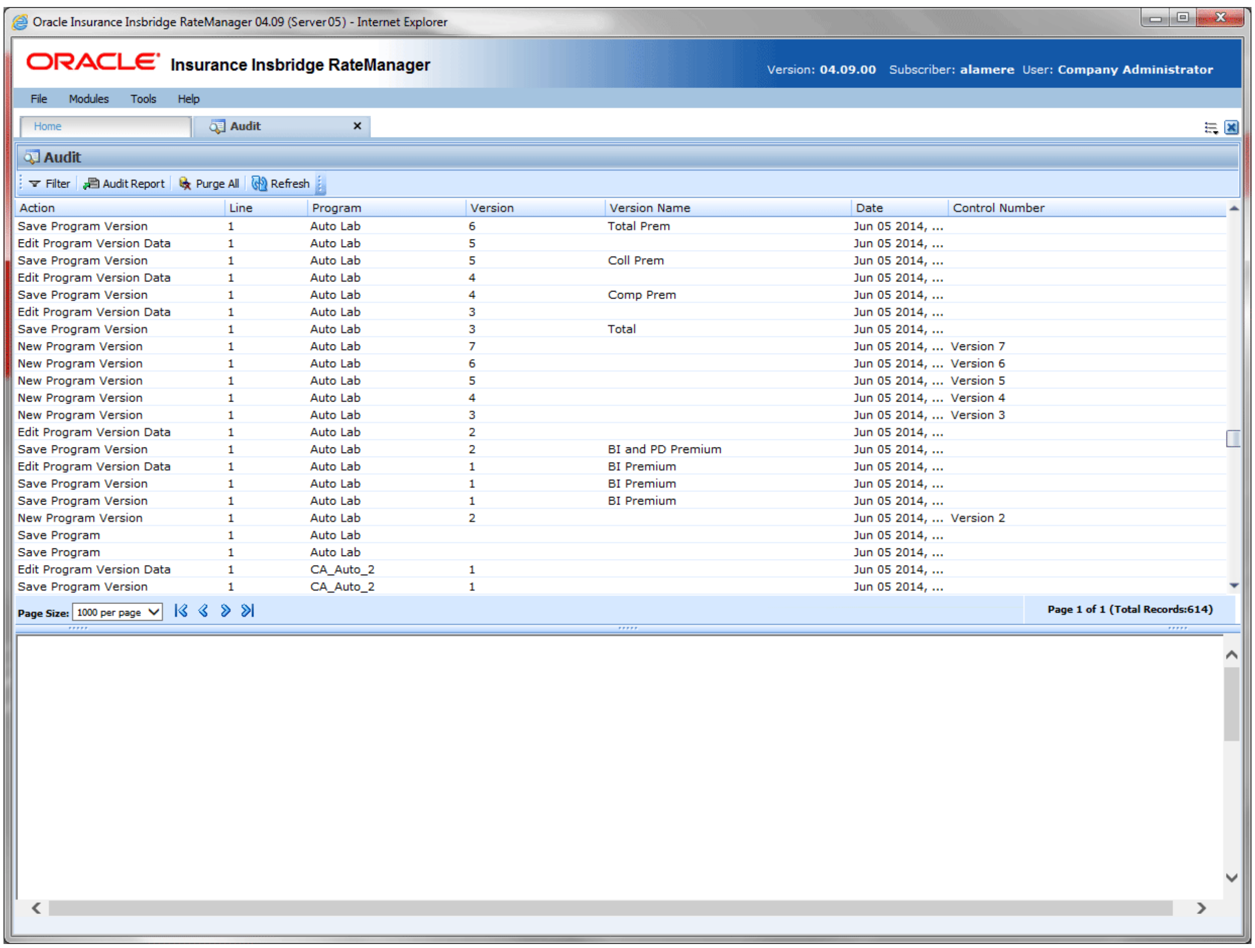


Figure 39 Audit Tab

Audit Functions

Filter	**Filter:** Opens up the filter option. You can select fields to filter on. The entries you make in the filter option will be the results returned. The results are displayed in the main body of the tab. Any field that does not match is not displayed. Filters are removed when you exit the tab or re-enter the filter option and remove the filter.
Audit Report	**Audit Report:** Opens up a full Audit Report for the audits currently being displayed. Audits that have been filtered out are not displayed.
Purge All	**Purge All:** Purges all audits currently displayed. Results can be filtered for purging. If you filter audits, only the audits that meet the filter criteria are displayed. These audits will be removed if you select to Purge All. If you select to purge all without a filter, every audit is deleted.
Refresh	**Refresh:** Refreshes the list of audits.

Audit Fields

The main body of the tab displays the logs that have been created since the last purge. There are five fields in the main body of the Audit tab.

Action: The action performed.

Line: The line of business. No Line means that this was a system action, for example, logging in or out of the system.

Program: The name of the program where the action took place. No Program name means that this was a system action.

Version: The program version number where the action took place. No Program Version number means that this was a system action.

Version Name: The program version name assigned to the program. This is an optional field and may not have an entry.

Date: The time stamp of when the action tool place.

Control Number: Displays any Change Control information. Change Control is optional and may not have an entry.

NOTE: *If you have Auditing on and no results are being displayed, verify that the Insbridge Message Service is running. Audit logs may not be displayed if the Message Service is not running.*

Right Click Menu

There is a right click menu available on every audit log.

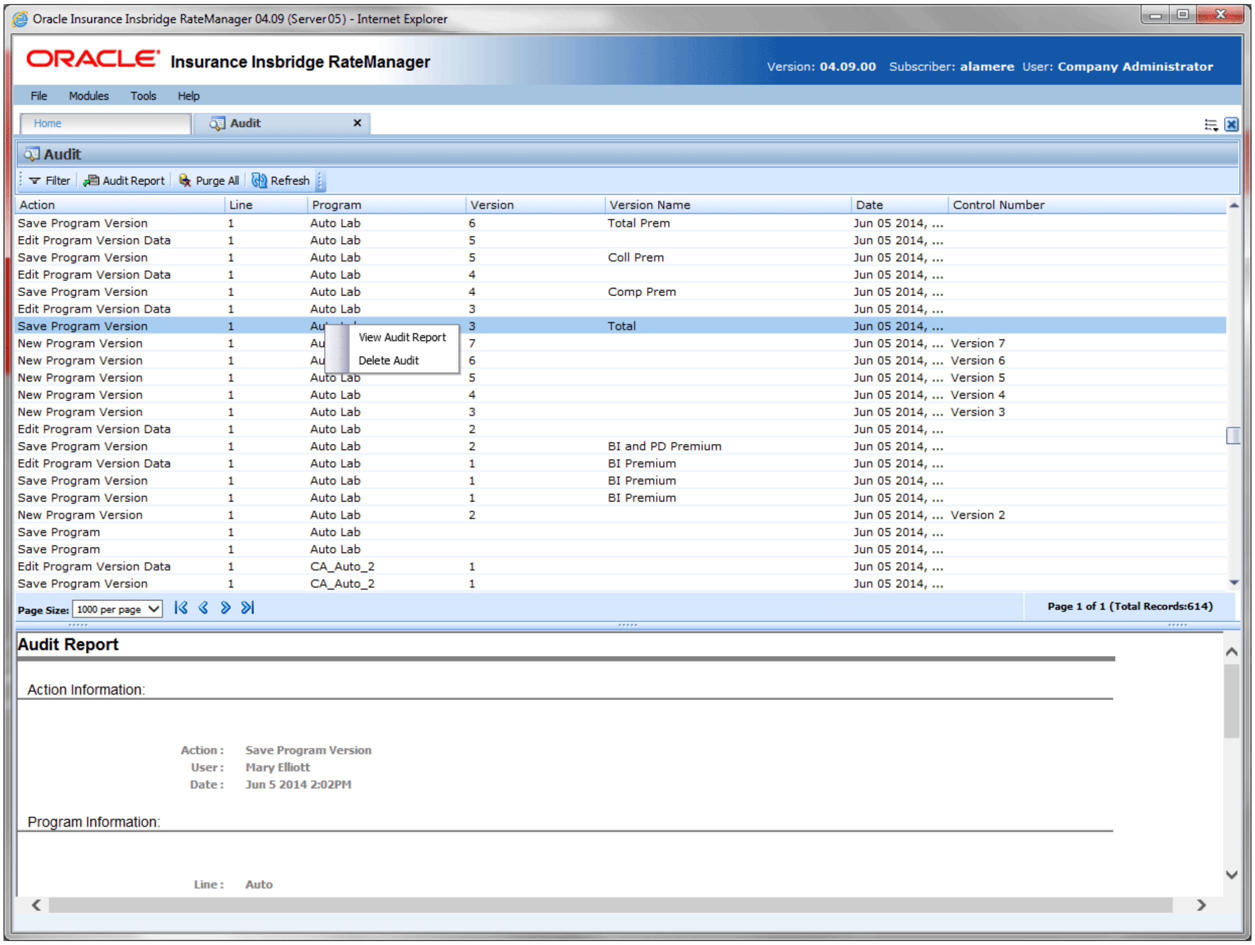


Figure 40 Audit Listing Right Click Menu

The right click menu contains two options:

- **View Audit Report:** Displays the audit report for this audit log only, in a printable form. If you do not need to print out an audit report, double click the log and view the audit details at the bottom of the screen.
- **Delete Audit:** Deletes the selected audit log only. Use this feature to delete logs that are not removed in a purge, such as purge logs and audits with Change Control entries.

FILTERING

Filtering allows you to filter audit logs by specific criteria. When you select a filter, any audit logs with that criteria are returned to the report. Results are listed newest to oldest. The results can then be used to create an Audit Report or be purged.

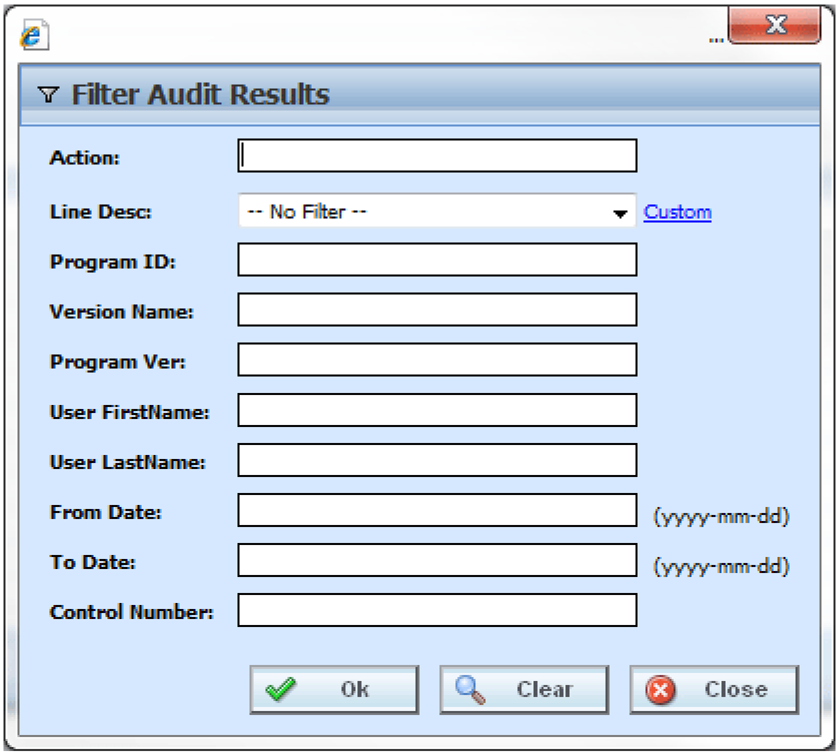


Figure 41 Filter Selection

Action: You can filter by words found in the action description. For example, Login, Save, Delete, or Control. You do not have to enter the entire phrase. For example, you can enter “New” and any action description with the word “New” in it will be returned. Your filter options depend upon the level of auditing the group has. If your group(s) has high auditing, more audit logs are created and you will have more types of actions you can filter on.

Line Desc: You can select an active line of business from the drop down menu or you can click the Custom link to enter in your own description.

Program ID: You can enter in the exact program ID. Only exact matches will be returned.

Version Name: You can enter in the exact program version name. Be aware that program version names are not required and are not unique. If you enter in 1, you may get many results for program version 1 from multiple lines of business and multiple programs. Only exact matches will be returned.

Program Ver: You can enter in the exact program version. Be aware that program versions are not unique. If you enter in 1, you may get many results for program version 1 from multiple lines of business and multiple programs. Only exact matches will be returned.

User FirstName: You can enter in a user first name up to 20 characters. Only exact matches will be returned.

User LastName: You can enter in a user last name up to 20 characters. Only exact matches will be returned.

From Date: Dates must be entered in yyyy-mm-dd format. Only entering in a From Date will return audit logs from that date until current. Date ranges can be returned by entering in both and from and to dates.

To Date: Dates must be entered in yyyy-mm-dd format. Only entering in a To Date will return all audit logs from the beginning of the audit log until that date. Date ranges can be returned by entering in both and from and to dates.

Control Number: You can enter in the exact Change Control number or tag used when creating the new revision. This is helpful if you want to make sure all changes were done against a particular change order. You do not have to go into each element to search. You can come here, enter in the change control identifier and view the list here. You can also do an action filter by the word Control to get a listing of all change controls.

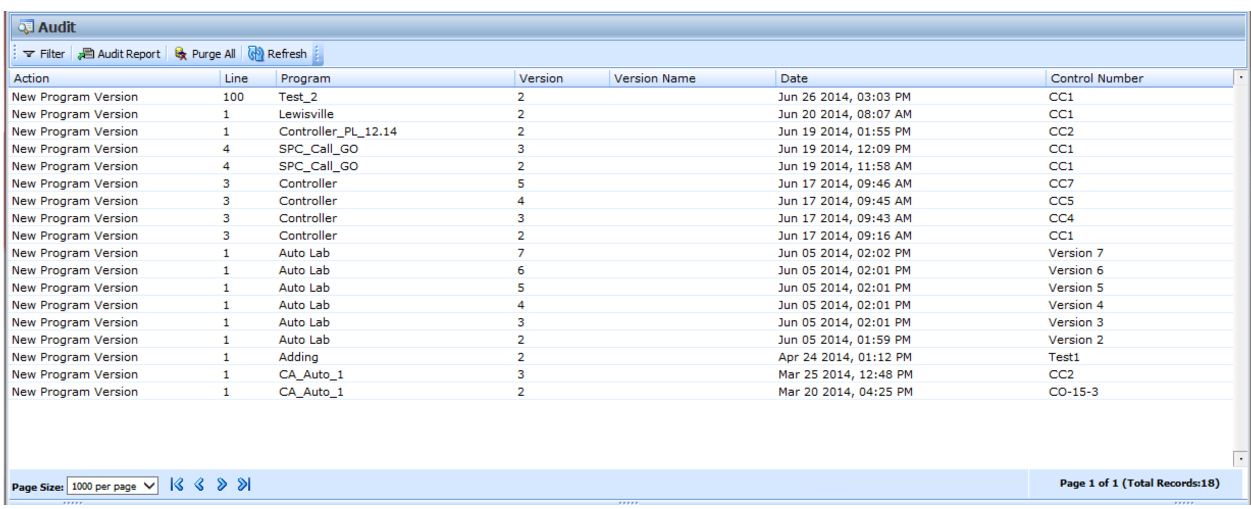
To Set Filtering

NOTE: *Line of Business 0 is MultiLines. To search for MultiLines items, you must do a custom search. Change the Line Desc field to custom and enter in a 0. Click OK to search.*

1. On the Audit tab, click **FILTER**. This pulls up a filter screen where you can enter criteria that will narrow your audit results.

   - You can choose one or more filters.
   - Filters remain in place until your remove them or leave the tab.
   - To clear a filter, click the **Clear** button. After you clear a filter, all Audit Logs will be returned.

2. After you have entered your filters, click **OK** to view your results.



Action	Line	Program	Version	Version Name	Date	Control Number
New Program Version	100	Test_2	2		Jun 26 2014, 03:03 PM	CC1
New Program Version	1	Lewisville	2		Jun 20 2014, 08:07 AM	CC1
New Program Version	1	Controller_PL_12.14	2		Jun 19 2014, 01:55 PM	CC2
New Program Version	4	SPC_Call_GO	3		Jun 19 2014, 12:09 PM	CC1
New Program Version	4	SPC_Call_GO	2		Jun 19 2014, 11:58 AM	CC1
New Program Version	3	Controller	5		Jun 17 2014, 09:46 AM	CC7
New Program Version	3	Controller	4		Jun 17 2014, 09:45 AM	CC5
New Program Version	3	Controller	3		Jun 17 2014, 09:43 AM	CC4
New Program Version	3	Controller	2		Jun 17 2014, 09:16 AM	CC1
New Program Version	1	Auto Lab	7		Jun 05 2014, 02:02 PM	Version 7
New Program Version	1	Auto Lab	6		Jun 05 2014, 02:01 PM	Version 6
New Program Version	1	Auto Lab	5		Jun 05 2014, 02:01 PM	Version 5
New Program Version	1	Auto Lab	4		Jun 05 2014, 02:01 PM	Version 4
New Program Version	1	Auto Lab	3		Jun 05 2014, 02:01 PM	Version 3
New Program Version	1	Auto Lab	2		Jun 05 2014, 01:59 PM	Version 2
New Program Version	1	Adding	2		Apr 24 2014, 01:12 PM	Test1
New Program Version	1	CA_Auto_1	3		Mar 25 2014, 12:48 PM	CC2
New Program Version	1	CA_Auto_1	2		Mar 20 2014, 04:25 PM	CO-15-3

Figure 42 Filtered Audit Listing Results

AUDIT REPORT

An audit report for all audit logs currently displayed on all pages by filter criteria can be produced. If you want an Audit Report for all audit logs, make sure the filter has been cleared. If you want an audit report for a specific type of audit log, make sure to filter by those criteria. For Example, if you want the audit logs from a particular day forward, then enter that day in the From Date on the Filter. All the audits from that day and forward will be listed. The audit report is a maximum of 15 pages.

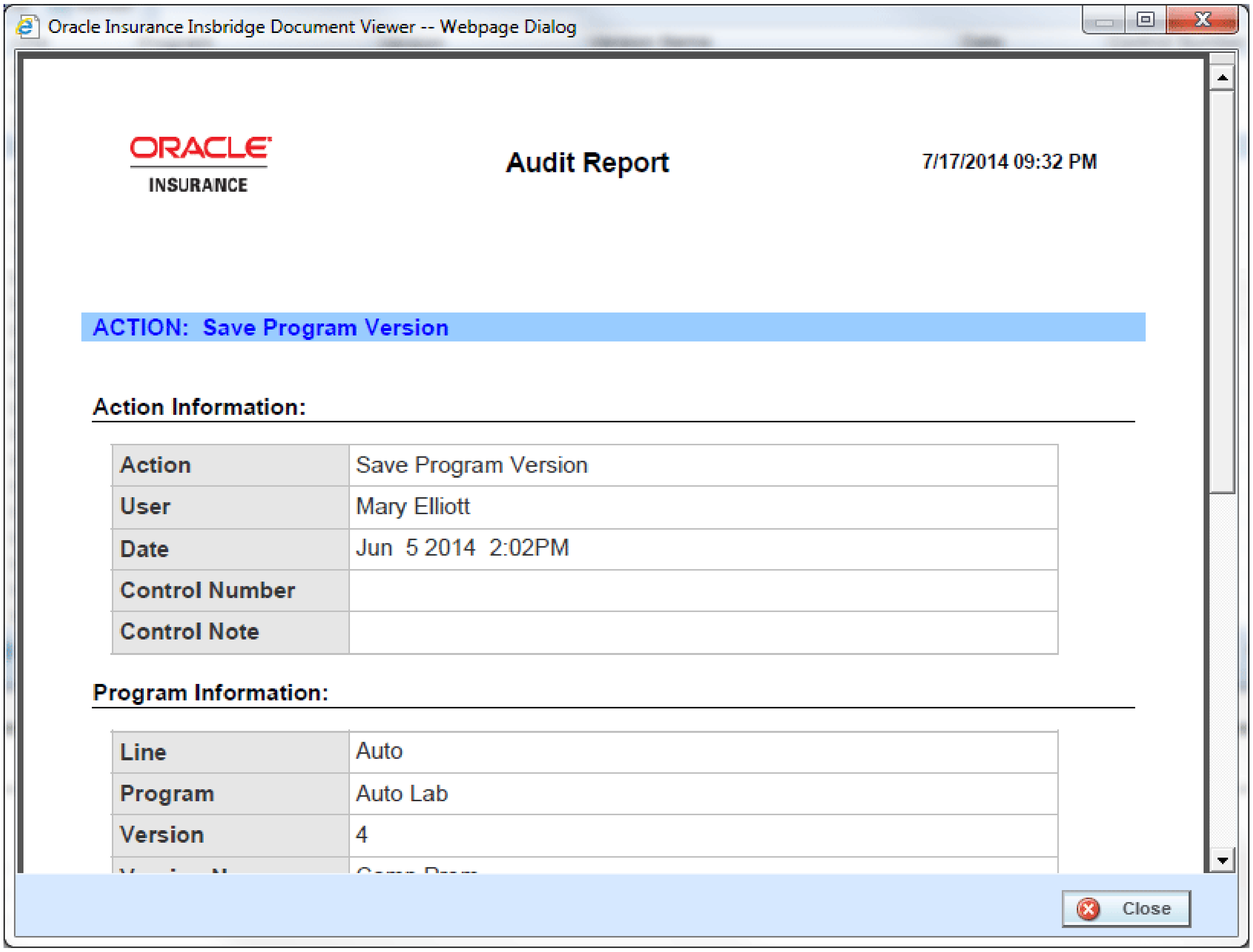


Figure 43 Audit Report

Creating an Audit Report

To create an Audit Report, enter in the criteria you want to filter by and click **Audit Report**. Reports are displayed in the Insbridge Document Viewer. These reports are read-only. Reports can be saved to your local hard drive or network or printed. No editing can be done on the Insbridge Document Viewer.

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

Report Details

The report contains details for each of the audit logs included, starting with the newest. Each log has action information, defining the action taken, the user, and the date. Program information, such as LOB, program, program version, and program ID, may be included. If applicable, element/item information including description, revision and ID may be included.

NOTE: *OBI Publisher must be installed and running in order for Program and Program Version Reports to be displayed. If you receive an OBI Publisher error, please contact your system administrator.*

Audit Preview

To view a specific audit, double click the line. The audit report details are displayed in **Preview Window** located in the lower portion of the tab.

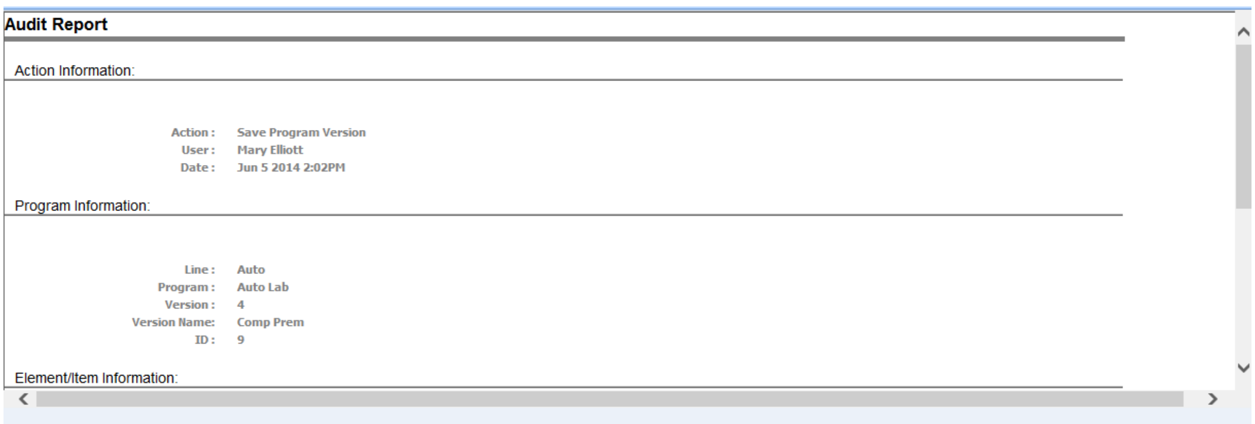


Figure 44 Audit Log Preview Screen

The preview window can be sized by dragging the separation bar between the audit list and the preview window. The preview window will update to show the currently selected audit log.

NOTE: *If logs are not displayed, please verify that the Insbridge Messaging Service is on. If the Insbridge Messaging Service is off, logs will not be displayed.*

Individual logs can be viewed or deleted.

Purging Audit Logs

Audit logs that do not have a change control can be purged at any time. Purge All removes all audit logs currently displayed on all pages by filter criteria. For example, if you have run a filter for all logs created on May 23, 2014, the screen displays all logs created on that day only. The logs may consist of one page or many pages. If you click Purge, all logs for May 23, 2014 without change controls will be purged. No other logs will be purged. To view remaining logs, clear the filter.

If you want to purge all audit logs without change control, do not place a filter on the list. If you only want to purge selected items, place a filter on the list. Purge will only remove the audit logs that are displayed on the Audit Listing screen. If you want to remove one audit, use the right click menu to delete.

To Purge Bulk Audits

1. If you have a specific audit type or group of actions you want to remove, set a filter for the bulk audits you want to remove.

2. When the audits you want to remove are displayed, click **Purge All**.

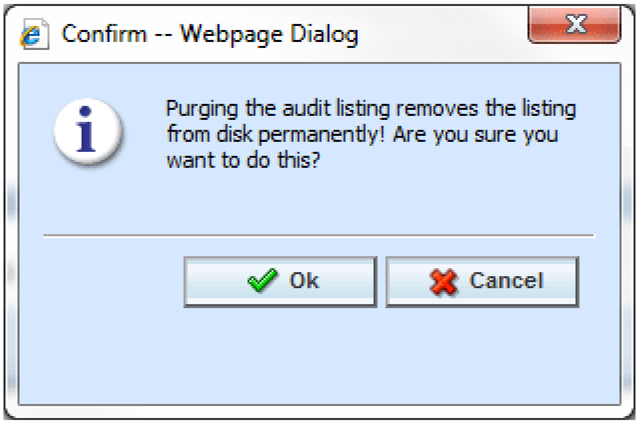


Figure 45 Purging an Audit List

3. Click **OK** to remove the all audits without change control currently displayed. Click **Cancel** to return to the previous screen.

NOTE: *Purge Logs and Change Control Audit logs are not purged in bulk. These logs must be deleted one at a time using the right click menu.*

To Delete One Audit

1. To remove one single audit that is no longer required, highlight the audit. Audits with change control can be deleted using Delete Audit.

2. Right click and select **Delete Audit** from the menu.

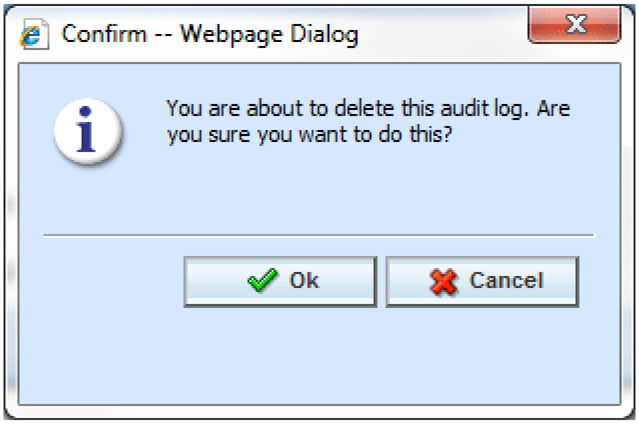


Figure 46 Purging an Audit List

3. Click **OK** to remove the log. Click **Cancel** to return to the previous screen.

Chapter 5

SECURITY

Any administrator may configure RateManager security settings. Usernames and groups can be created and system rights assigned. Groups can be created to grant users access to specific lines of business and specific screens within that line of business (variables, algorithms, etc.), with or without write access. Groups also can be given access to specific modules, Testing or Impact Analysis.

Security can be found on the Tools menu. There are three options you can select:

- User Management
- Group Management
- Session Management

USER MANAGEMENT

The user management tab allows an administrator to add, edit and delete users. This portion of RateManager is only available to users who are members of the Administrator group.

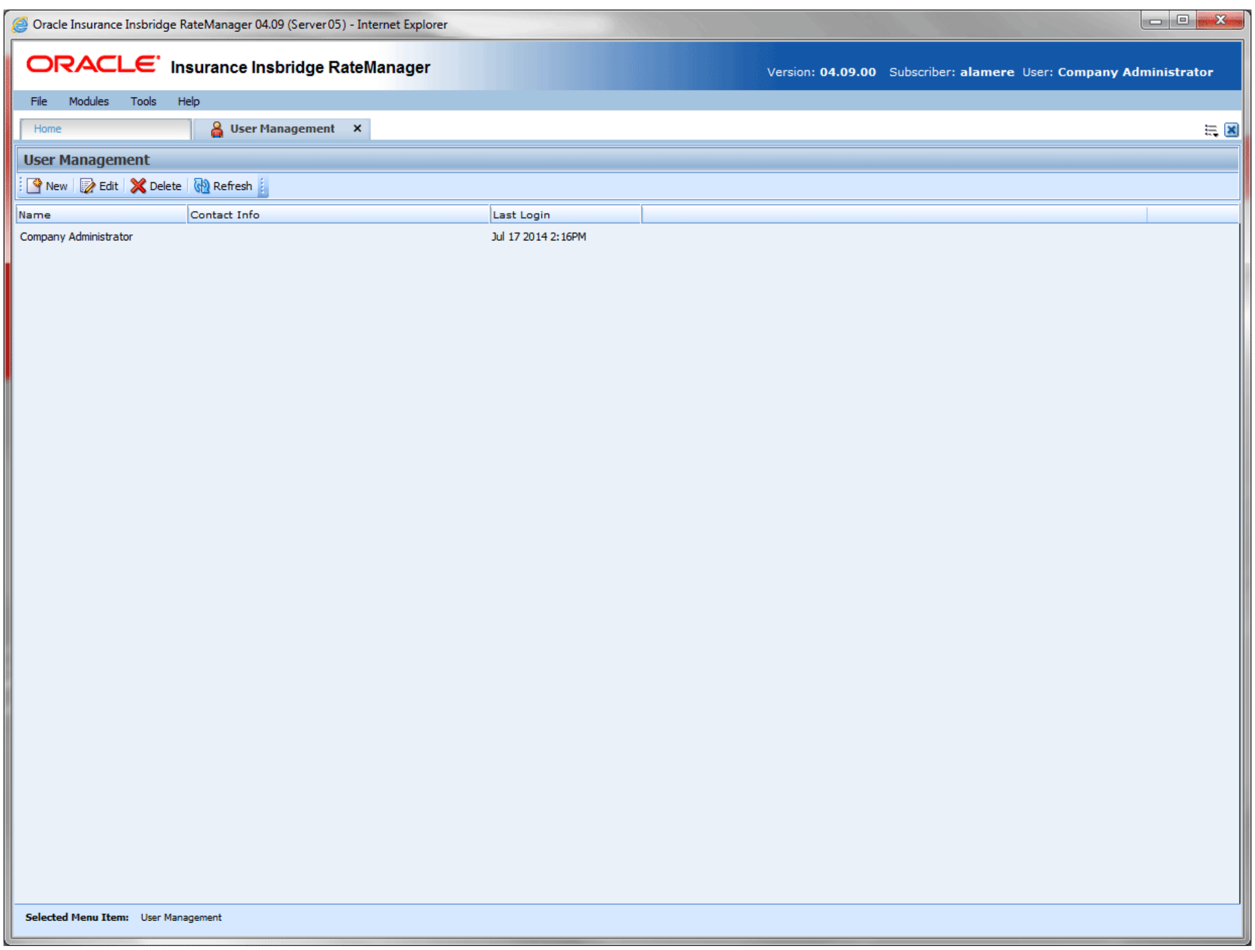


Figure 47 User Management Screen

From here, you can:

- Add a User
- Edit a User
- Delete a User
- Reset a User Password

Company Administrator is the only user in a new system. All other users must be created. The Company Administrator cannot be deleted nor have their rights edited.

User Management Functions

New	**New:** Opens up the Create User tab where new users can be added to the system.
Edit	**Edit:** Opens up the Edit User tab where user information can be updated and user password reset.
Delete	**Delete:** Deletes the selected user.
Refresh	**Refresh:** Refreshes the list of users.

User Management Fields

The main body of the tab displays the users that have been created. There are three fields in the main body of the User Management tab.

Name: The first and last name of the user.

Contact Info: The phone number and email address of the user. The email address will be hyperlinked, allowing you to create an email for this user.

Last Login: The time stamp for the last date and time the user logged into the system.

ADDING A USER

New users can be added from the **Add User** tab. All new users will be assigned the default password, **password**. New users should log in as soon as possible and change their password.

There are two icons and two buttons located on the tab.

*	**Required:** A red asterisk indicates that this field is required. You cannot save your entry unless all the required fields are complete.
	Information: Click the information icon to see more information about the entry.
<<	**Select Arrow Move Left:** The column on the right lists the available groups. The Select Arrow Move Left moves the selected group over to the left side column. Upon saving, the user will belong to that group.

>>	**Select Arrow Move Right:** The column on the left lists the group(s) the user is currently a member of. The Select Arrow Move Right removes the selected group over to the right side column. The user will no longer belong to that group.
Save	**Save:** Saves your entry. The Save option is located in the lower right hand corner of the tab.
Cancel	**Cancel:** Cancels any changes and returns you to the User Management tab. The Cancel option is located in the lower right hand corner of the tab.

Adding a New User

NOTE: *Prior to creating a user, make sure you have your user groups created.*

1. Navigate to Tools->Security->**User Management** tab.

2. Click **New** to open the Add User tab.

3. Select the **Group**(s) the new user will belong to by selecting a group or groups from the Select Groups list and then clicking Select Arrow – Move Left. Upon saving, the user will belong to that group.

4. Select the **Company** the user belongs to from the drop down listing.

   Subscriber information may be needed by users when logging into the system. If more than one subscriber was created, users must be directed to the subscriber where their logins were created. Subscriber information is necessary for custom XML creation and testing and is also needed for Libraries.

   If you have not created subscribers in IBFA, you will not be able to assign users to a company.

5. Enter a **First** and **Last** name for the user in the appropriate text boxes.

6. Enter a **Username** for the new user. The username must be at least six, but fewer than twelve, alphanumeric characters and can include an underscore (_) or period (.).

7. Enter a **Department** for the user.
8. Select whether the new user is a **Network User** by selecting **True** or **False** from the drop down.

9. Optionally, enter a **Phone Number** and **Email Address** for the new user.

10. If you want the user's password to expire, click the box next to **Password Expires**. The Preferences screen contains the number of days required for a password change.

11. When you are finished, click **Save**. The user is added to the system and the user list is updated. The new user can now log in using the username you assigned them and the default password, **password**.

12. The user should change their password the first time they log in. See Changing Your Password for more information.

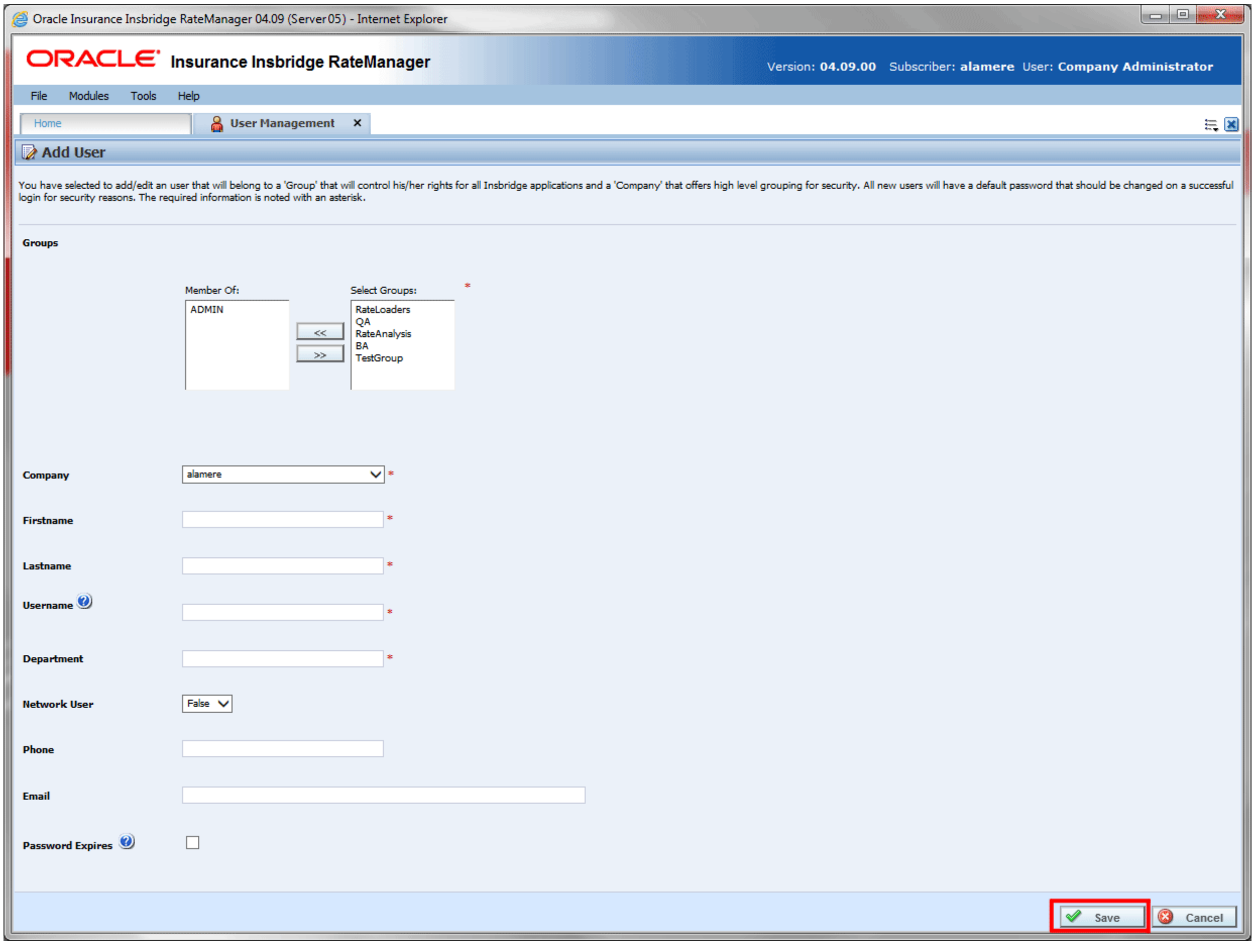


Figure 48 Adding a New User

Network Users

The network user option (if set to true) is to be used in conjunction with the Insbridge portal.

If set to **True**, network user's credentials (username and password) are validated using Windows Authentication Tokens. The username in RateManager must match the network user ID. Users can access RateManager using the Insbridge portal. Users will need the Insbridge URL to access RateManager via the portal. They will not be required to enter login information at the RateManager login screen.

Please see the Insbridge Portal Configuration Guide for instructions on setting up a portal.

If set to **False,** users must enter a valid username and password via the RateManager login screen. Users will need their username and password along with the RateManager URL to access RateManager. Users set up with a **False** Network User can still access the Insbridge portal. They will be required to enter their login information when accessing RateManager.

Removing a User Group

To remove a user from a group, select the **Group**(s) the user will be removed from and click **Select Arrow Move Right**. Upon saving, the user will no longer belong to that group.

EDITING A USER

This section allows an administrator to change a user's information such as their email address or phone number. It also allows for a user’s password to be reset.

To Edit a User

1. Navigate to the **User Management** tab.

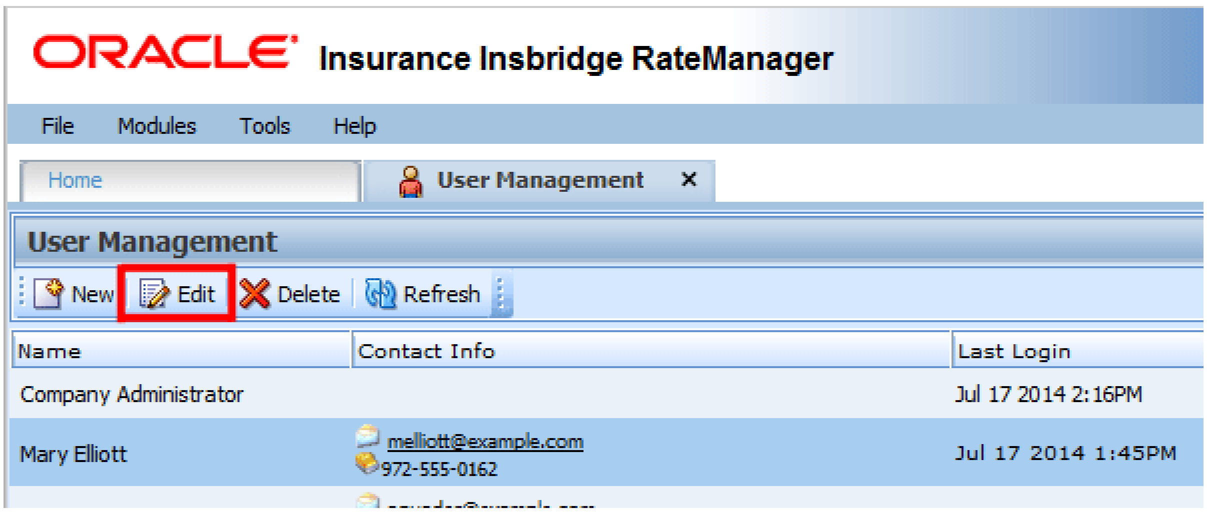


Figure 49 User Management for Editing a User

2. Select the user you want to edit and click **Edit**. You also can edit a user by double-clicking their name.

3. This opens the **Edit User** tab. This screen is similar to the Add User tab and all information can be edited, with the following exception: the reset password option.

4. When you have finished making changes, click **Save** to update the user's information and refresh the user listing. If you do not want to save your changes, click **Cancel**.

Resetting User Passwords

You have the option to reset a user's password. If a user forgets their password, you can reset it on the Edit User tab.

1. Navigate to the **User Management** tab

2. Select the user whose password you want to reset and click **Edit**. This opens the **Edit User** tab.

3. Scroll to the bottom of the tab and check the reset password box. The user's password is reset to the default password, **password**.

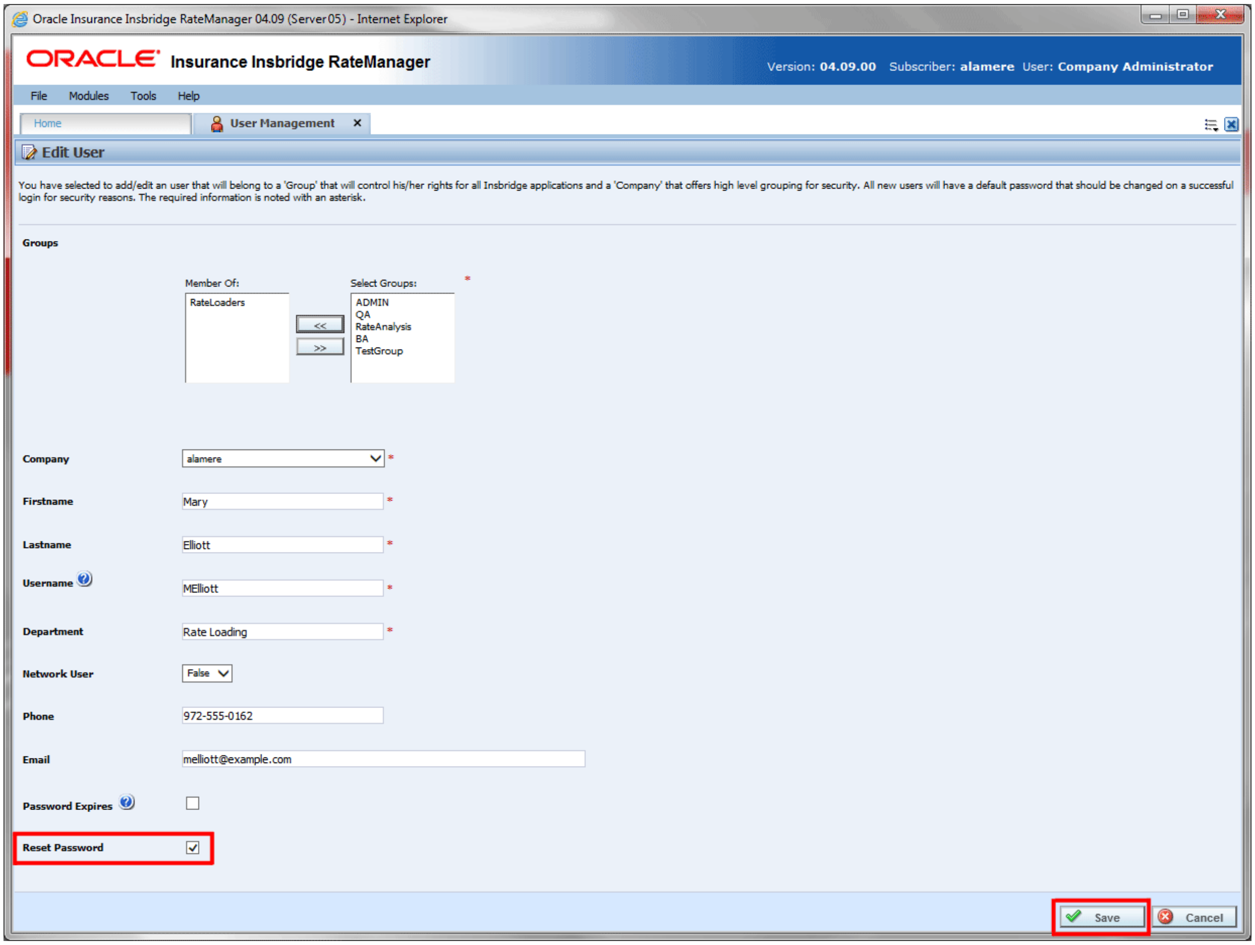


Figure 50 Resetting a Password

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

The user should change their password the next time they log in but will not be required to do so.

Deleting a User

If a user is no longer needed, they can be deleted. Any user at any time can be deleted. Only the Admin user cannot be deleted.

To Delete a User

1. Navigate to the User Management tab.
2. Select the user you want to delete and click **Delete**.

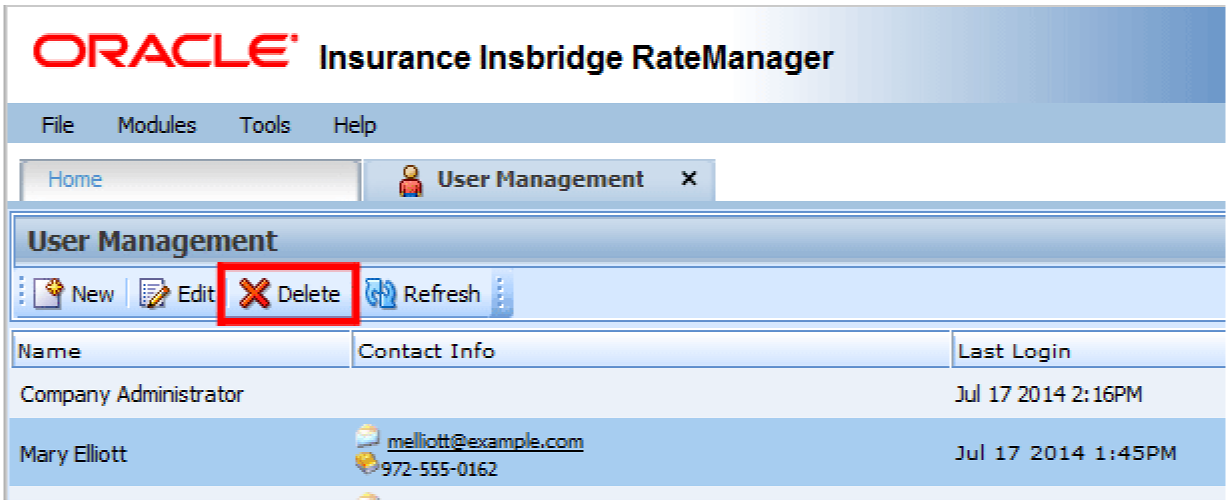


Figure 51 User Management for Deleting a User

3. You will be asked to confirm deletion of the user.

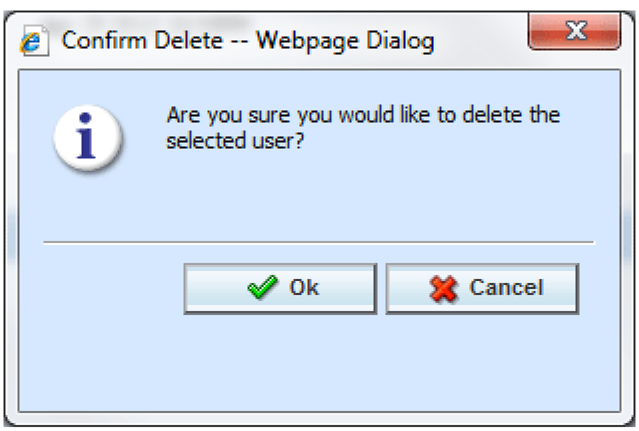


Figure 52 Confirmation Message for Deleting a User

4. Click **OK** to delete the user and refresh the user listing. Click **Cancel** to return to the user listing without deleting the user.

GROUP MANAGEMENT

The group management tab allows an administrator to add, edit, and delete user groups. RateManager groups are used to assign rights to a set of users. You must create groups prior to creating users.

For example, you may have one group called **Testers** that can only access the Testing module and another group called **AutoLoaders** that only has access to the auto line of business.

The **Admin** group is a default group and will be the only group in a new system. This group cannot be deleted or edited or have their rights edited. All other groups must be created. The **Admin** group is the only group that has access to the **Security** module of RateManager.

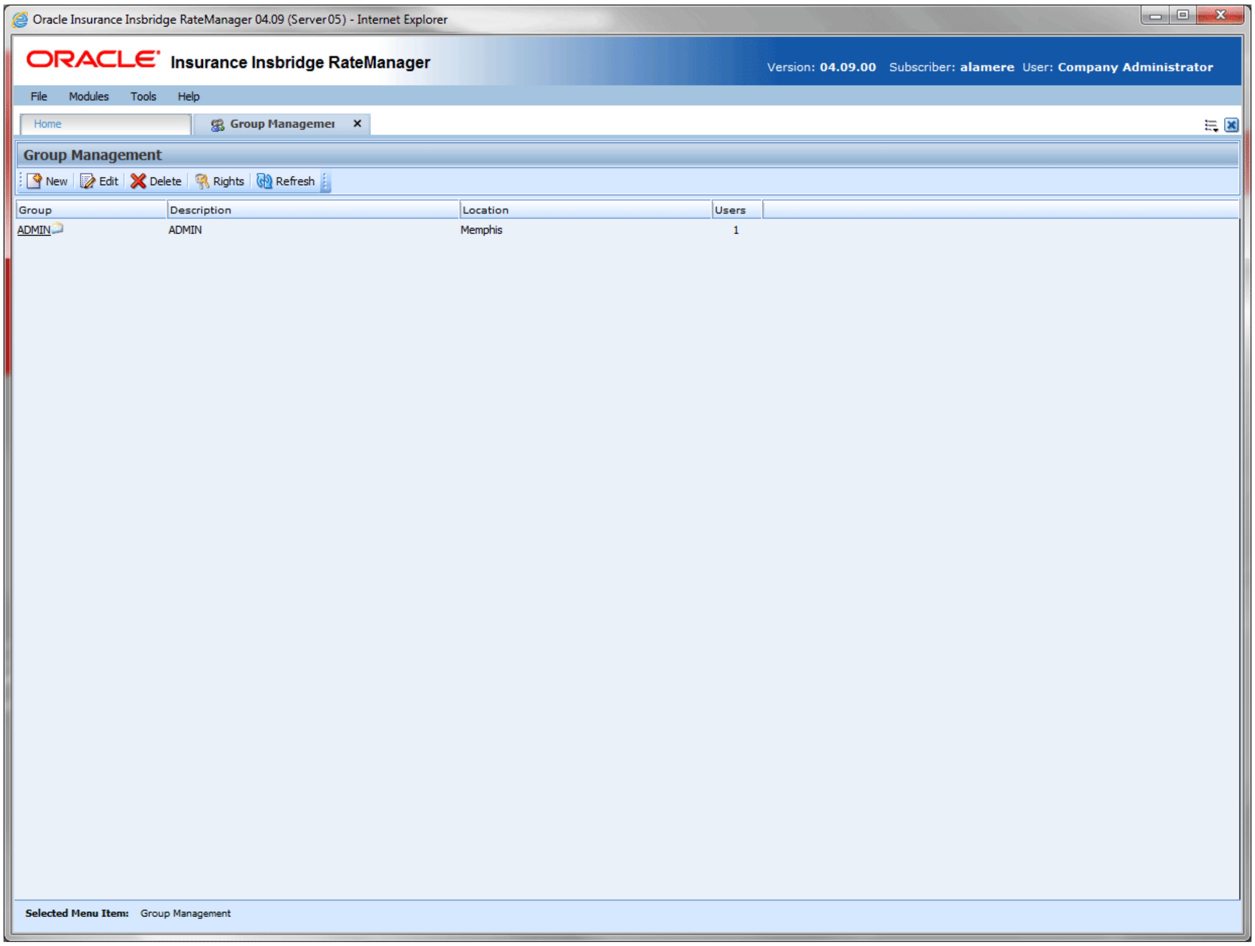


Figure 53 Group Management

From here, you can:

- Add a Group
- Edit a Group
- Edit a Group's Rights
- Delete a Group

Group Management Functions

New	**New:** Opens up the Add Group tab where new groups can be added to the system and auditing levels can be set.
Edit	**Edit:** Opens up the Edit Group tab where group information can be updated.
Delete	**Delete:** Deletes the selected group. Before deleting a group, you must remove all members from the group.
Rights	**Rights:** Opens the Rights screen where you can manage group's rights. .
Refresh	**Refresh:** Refreshes the list of groups.

Group Management Fields

The main body of the tab displays the groups that have been created. There are four fields in the main body of the Group Management tab.

Group: The name of the group.

Description: A description of the group.

Location: The location entered for the group.

Users: The number of users in this group.

ADDING A GROUP

New groups can be added from the **Add Group** tab at any time. There are two steps to creating a group:

- **Step 1: Add the Group** This step creates the group and allows you to add information about the group. The step is performed on the Add Group tab.
- **Step 2: Assigning Group Rights** This step defines the permissions this group will have. This step is performed on the Group Management tab→Rights screen.

On the Add Group tab, there are two icons and two buttons located on the tab.

*	**Required:** A red asterisk indicates that this field is required. You will not be allowed to save your entry unless all the required fields are complete.
	Information: Click the information icon to see more information about the entry.
Save	**Save:** Saves your entry. The Save option is located in the lower right hand corner of the tab.
Cancel	**Cancel:** Cancels any changes and returns you to the User Management tab. The Cancel option is located in the lower right hand corner of the tab.

Adding a Group

1. Navigate to Tools->Security-> Group Management.
2. Click **New** to open the Add Group screen.

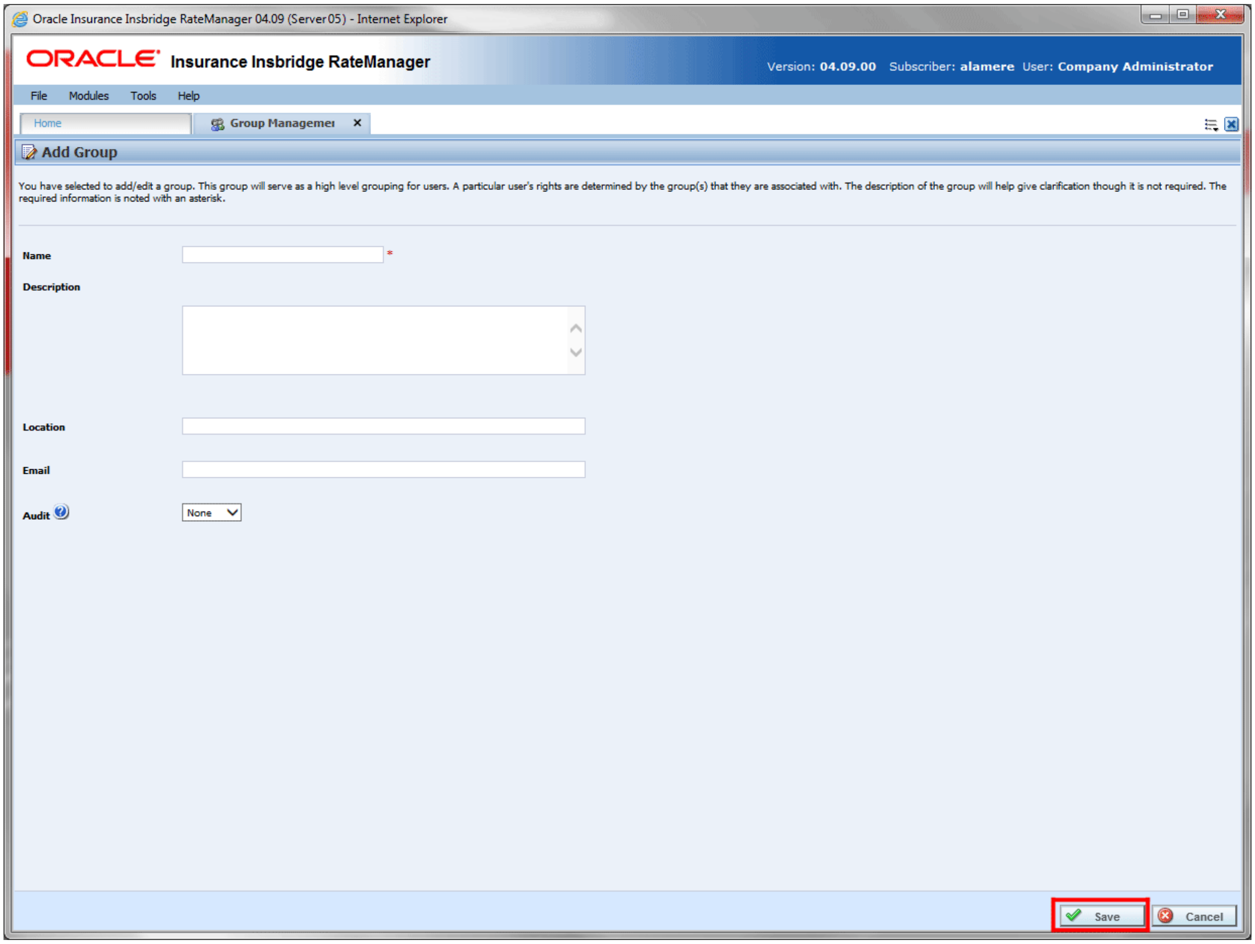


Figure 54 Adding a Group

3. Enter a **Name** for the new group. The name can be any combination of alphanumeric characters, with one to fifty characters. Blanks, periods, underscores, etc. are not allowed.
4. Optionally, enter a **Description, Location** and **Email** address for the new group.
5. Check if you want Auditing for this group.
6. When you are finished, click **Save**. The group is added and the group list is updated. Users can now be assigned to the group through User Management.

Auditing

Auditing is set at the group level and applies to all members of the group. If a user is assigned to more than one group, auditing will apply to the group(s) that has it activated.

There are three levels of auditing:

1. **None:** Auditing is not tracked for the group.

2. **Normal:** All saves, and deletes for the group are tracked.

3. **High:** All new items, saves, and deletes for the group are tracked.

If auditing is set to normal or high, a log is kept for changes and actions done by each member of the group. If auditing is set to none, no logs are kept. Audit logs are displayed in the Audit tab.

Auditing is also displayed in the View History report. The View History report contains audit logs for the users who have auditing in place. For example, if your RateLoading group has auditing set to high and your BA group has no auditing, the View History report will only contain the actions done by the RateLoading group. Since the BA group did not have any auditing turned on, none of their changes or actions will be listed in either the Audit Module or the View History report. The level of auditing will determine the detail of the View History report.

Auditing can be set for any group, including admins. If auditing is set to high for the admin group, logs are created for adding, editing, and deleting users. Logs are also kept for adding, editing, and deleting user groups.

Session logs are kept for all users and record when users log in and log out.

Group Rights

Group Rights are broken into areas and lines of business. You can allow users access to the entire system or just certain modules. You also can restrict users from performing certain actions, such as packaging or creating folders.

User Actions	VIEW	WRITE	PACKAGE	LOCK
Permissions to Grant				
RateManager Domain Admin				
Line Management – Allows users full access to manage lines.	X	X		
Subline Management – Allows users full access to manage sublines.	X	X		
Setup Options – Allows users to create, edit, and delete elements in Setup Options. Users with any Domain Admin rights can perform Setup Options. Users without Domains Admin rights can view only.	X	X		
RateManager MultiLines				
Programs –	X			
Write Access –		X		
Scenario –	X			
Write Access –		X		
MultiLines Mapping –	X			
Write Access –		X		
Inputs –	X			
Write Access –		X		
MultiLines –	X			
Write Access –		X	X	
RateManager Testing				
Testing Module – Allows users full access to the testing module.	X	X		
RateManager Package Admin				
Program Export – Allows users to export programs in the Library.	X	X		
Program Import – Allows users to import programs in the Library.	X	X		
Release Management – Allows users to access the Releases Module.	X	X		
Database Support				
Backups – Allows users to create database backups within RateManager.	X	X		
Restores – Allows users to restore databases within RateManager.	X	X		
LOB				
Variables –	X			
Write Access –		X		
Algorithms –	X			
Write Access –		X		

Driver Assignment – AUTO LOB ONLY	**X**			
Write Access –		**X**		
Sequencing –	**X**			
Write Access –		**X**		
Output Mapping –	**X**			
Write Access –		**X**		
Inputs –	**X**			
Write Access –		**X**		
Categories –	**X**			
Write Access –		**X**		
Program Management –	**X**			
Write Access –		**X**	**X**	
Lock Admin –				**X**

Permission to Grant Definitions

There are six areas:

1. **RateManager Domain Access:** Allows users to manage lines and sublines.
    a. **Line Management:** Users will be able to create, edit, activate, deactivate, delete the line and delete all programs in the line. The permission may be needed by users who work with templates.
    b. **Subline Management:** Users will be able to create, edit, activate, deactivate, delete the line and delete all programs in the line. The permission may be needed by users who work with templates.
    c. **Setup Options:** Setup options can be viewed by all users. Permissions are required to create, edit, and delete Setup Options. Any Domain Access permission grants permissions to work in Setup Options. The permission may be needed by users who set naming standards, create variable messages, or manage system level constants.

2. **RateManager MultiLines:** Allows users to work in the MultiLines Module.
    a. Read permissions are granted to all areas in MultiLines by checking any element.
    b. Write permissions are granted per element. Checking a write permission will also grant read permission to all areas in MultiLines.
    c. Package permissions are in the MultiLines section. Checking a write permission will grant package permissions as well as grant read permission to all areas in MultiLines.

3. **RateManager Testing:** Allows users to work in the Testing Module. Users are granted full access when the element is checked.

4. **RateManager Package Admin:** Allows users to work with packages in the system and allows user to input mappings. Users are granted full access when the element is checked.
    a. **Program Export:** Allows users to create export programs on the Library tab. The permission may be needed by users who work with templates.
    b. **Program Import:** Allows users to apply exported programs and templates on the Library tab. The permission is needed by users who work with templates.
    c. **Release Management:** Allows users to work in the Releases Module. Users are granted full access when the element is checked.

5. **Database Support:** Allows users to work on Database Backups and Database Restores. Users are granted full access when the element is checked.

6. **LOB:** Each line of business will have rights separate from the other lines.
    a. Read permissions are granted to all areas within the line by checking any element.

b. Write permissions are granted per element. Checking a write permission will also grant read permission to all areas in the line.
c. Package permissions are in the Program Management section. Checking a write permission grants package permissions as well as grant read permission to all areas in the line. Package permissions also allows for users to manage folders, move, copy, and create revisions.

User Actions Definitions

Write Access allows users to create and edit entries. Users who do not have write access have Read-Only access unless access to the entire module has not been granted.

- **View:** Allows users to view the elements that have been created.
- **Write:** Allows users to create, edit, copy, and delete elements.
- **Package:** Allows users to create RateManager, SoftRater and Global Versioning packages.
- **Lock:** Allows users to lock programs.

Assigning Group Rights

Edit group's rights when you want to change the applications and lines of business users of that group have access to.

1. Navigate to the Tools->Security->Group Management tab and select the group whose rights you want to edit. Click **Rights**. If an email address has been entered for the group, the group's name is hyperlinked and underlined (such as Admin). For these groups, click to the right of the name to select.

2. This opens the **Groups Rights** window.

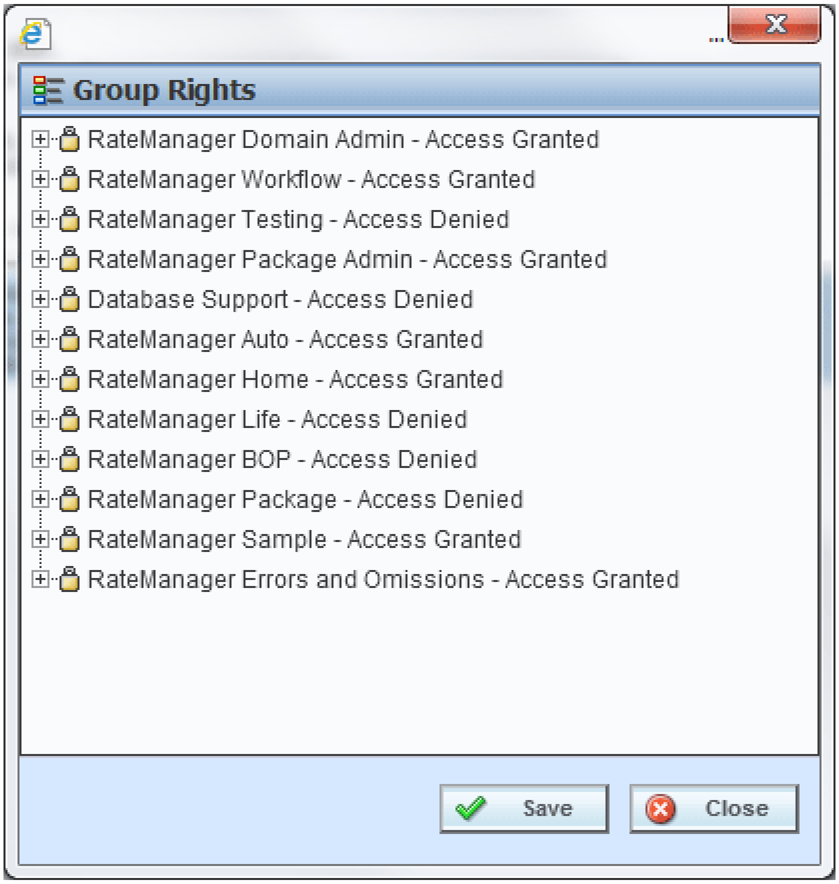


Figure 55 Expanded Group Rights Management Screen

3. From here, you can assign rights to the group for the various modules of RateManager. Expand the appropriate section and place a check next to an item to give the group access to that section.

   For example, if you wanted to allow this group to access and change sections of the Auto line of business, you would expand **RateManager Auto** by clicking the ⊞ (plus box). You would then expand each section of Auto (Variables, Algorithms, etc.) and place a check in the **Write Access** box for each section where you wanted users to have access. If you only wanted to allow a group to view a section, but not make any changes, you would only place a check next to that item and not the **Write Access** box.

4. When you are finished making changes, click **Save**. To cancel your changes, click **Close**.

No Permissions to Work in Lines

After a group has been added, you must assign group permissions. If you do not, users will not have access to lines.

If a user does not have access to lines of business, they are not assigned to a group that has the proper permissions. Have the user close out of their session prior to changing their group or group permissions.

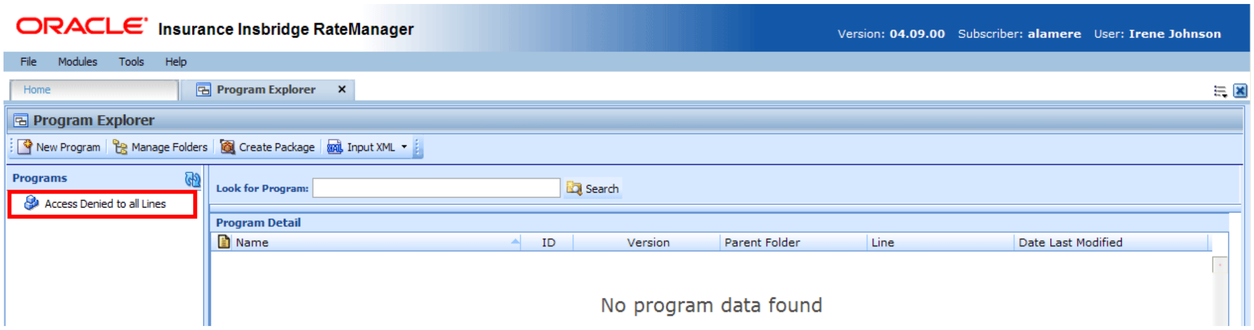


Figure 56 Users Denied Access to Lines

EDITING A GROUP

Edit a group when you want to change the group's name, description, location or email address. Any changes will apply to all members of the group.

Editing a Group

1. Navigate to the Group Management tab.
2. Select the group you would like to edit and click **Edit.** You also can edit a group by double-clicking it. If an email address has been entered for the group, the group's name will be underlined (such as Administrator). For these groups, click to the right of the group name to select it or click the underlined name to send the group an email.
3. This opens the **Edit Group** tab.

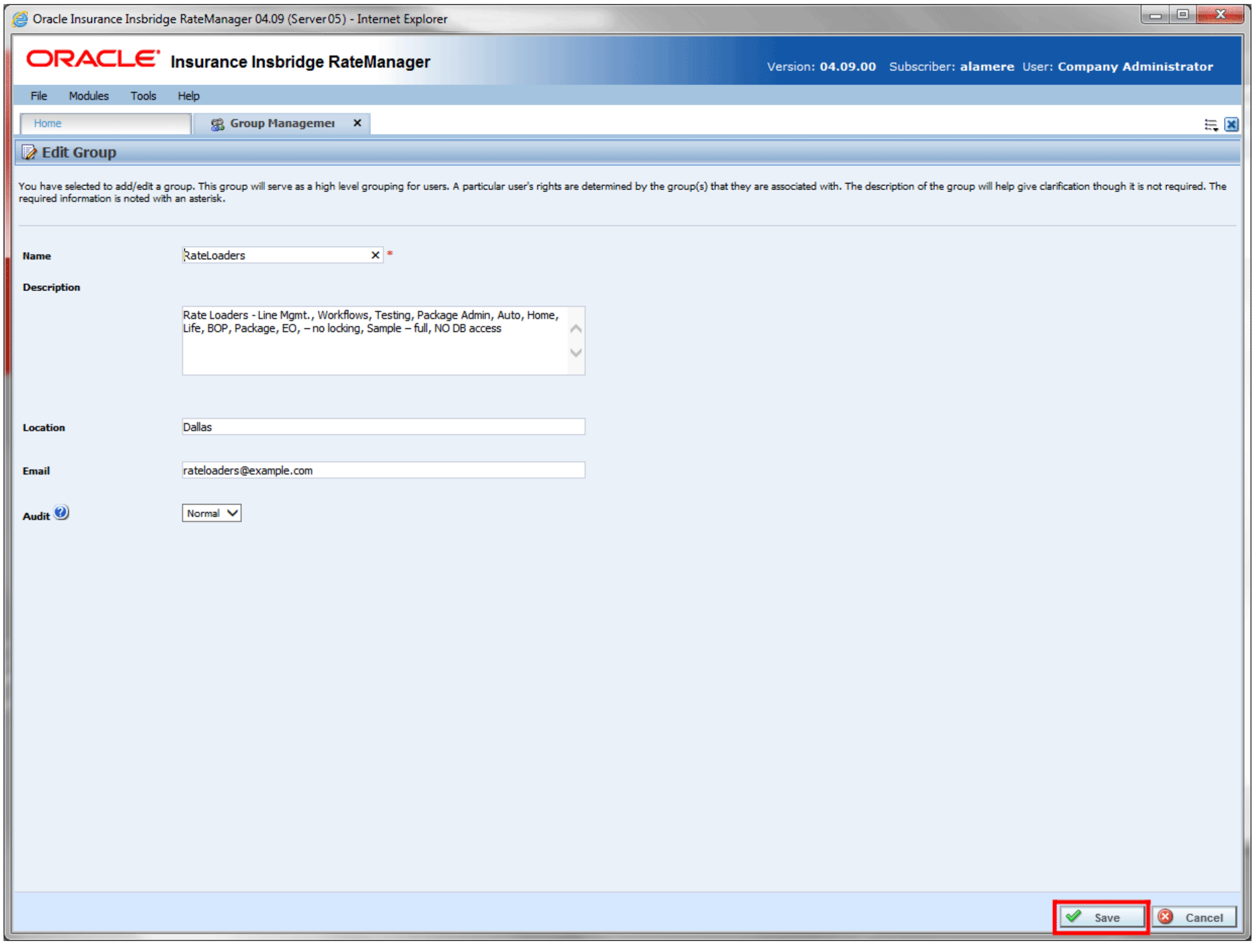


Figure 57 Editing a Group

4. All fields can be edited. Make your changes.

5. When you have finished making changes, click **Save** to update the group's information and refresh the group listing. If you do not want to save your changes, click **Cancel**.

Deleting a Group

If a group is no longer needed, it can be deleted. Only groups that currently have no users assigned to them can be deleted.

Deleting a Group

1. Navigate to the Group Management tab.
2. Select the group you want to delete and click **Delete**.
3. If the group currently has users assigned to it, you will receive an error.

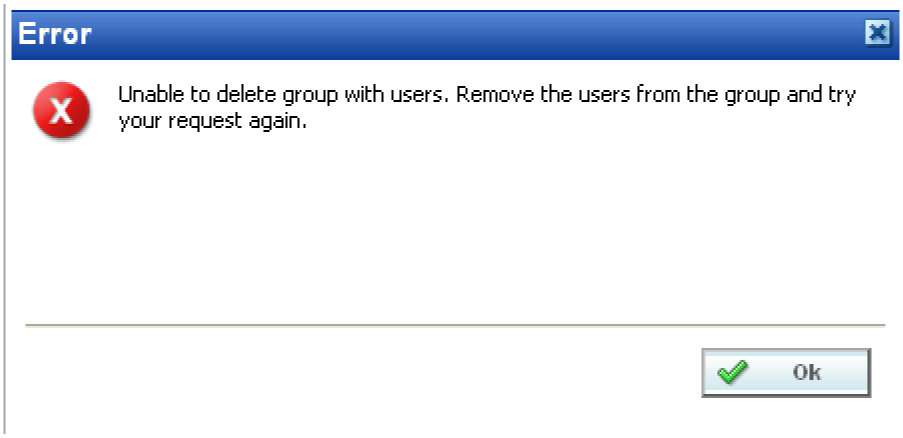


Figure 58 Error Message for Deleting a Group

4. Remove all users from the group by either deleting the users or assigning the users to another group (see Editing a User) and then try your delete request again.

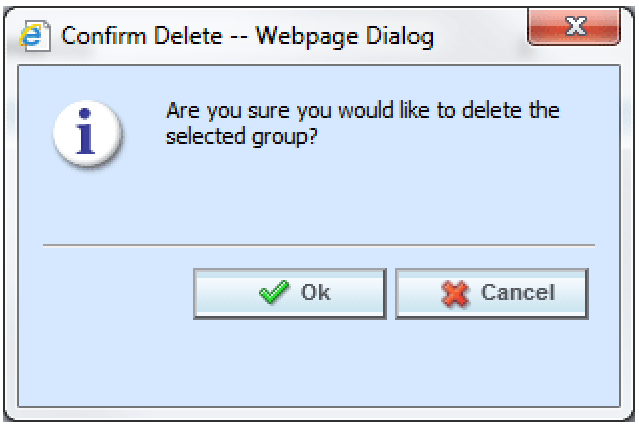


Figure 59 Deleting Group Confirmation Message

5. If the group does not have any users assigned to it, you will be asked to confirm deletion of the group.

6. Click **OK** to delete the group and refresh the group listing. Click **Cancel** to return to the group listing without deleting the group.

Group Management Tab

A completed Group Management tab lists the groups, the location of the group and the total number of members in each group.

The number of users may be greater than the total number of users. Users may be assigned to more than one group.

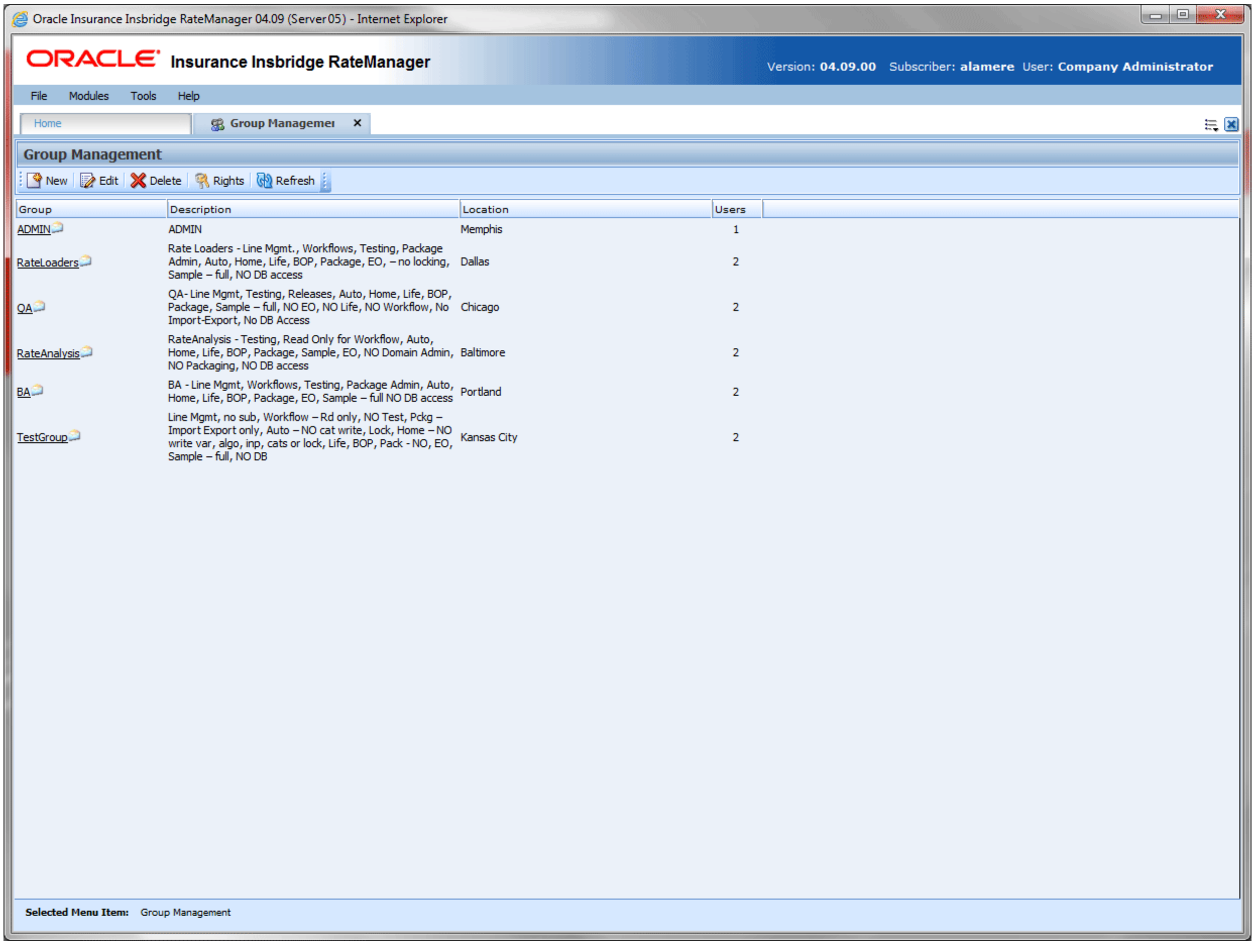
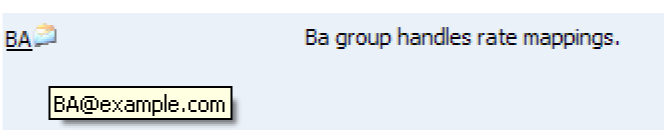


Figure 60 Completed Group Management Tab

Viewing Group Contact Information

If you have entered any contact information for the group, you can view that information by holding your cursor over the group name.



SESSION MANAGEMENT

The Session Management tab allows an administrator to view users who currently have a RateManager session open and disconnect them to free up a locked element.

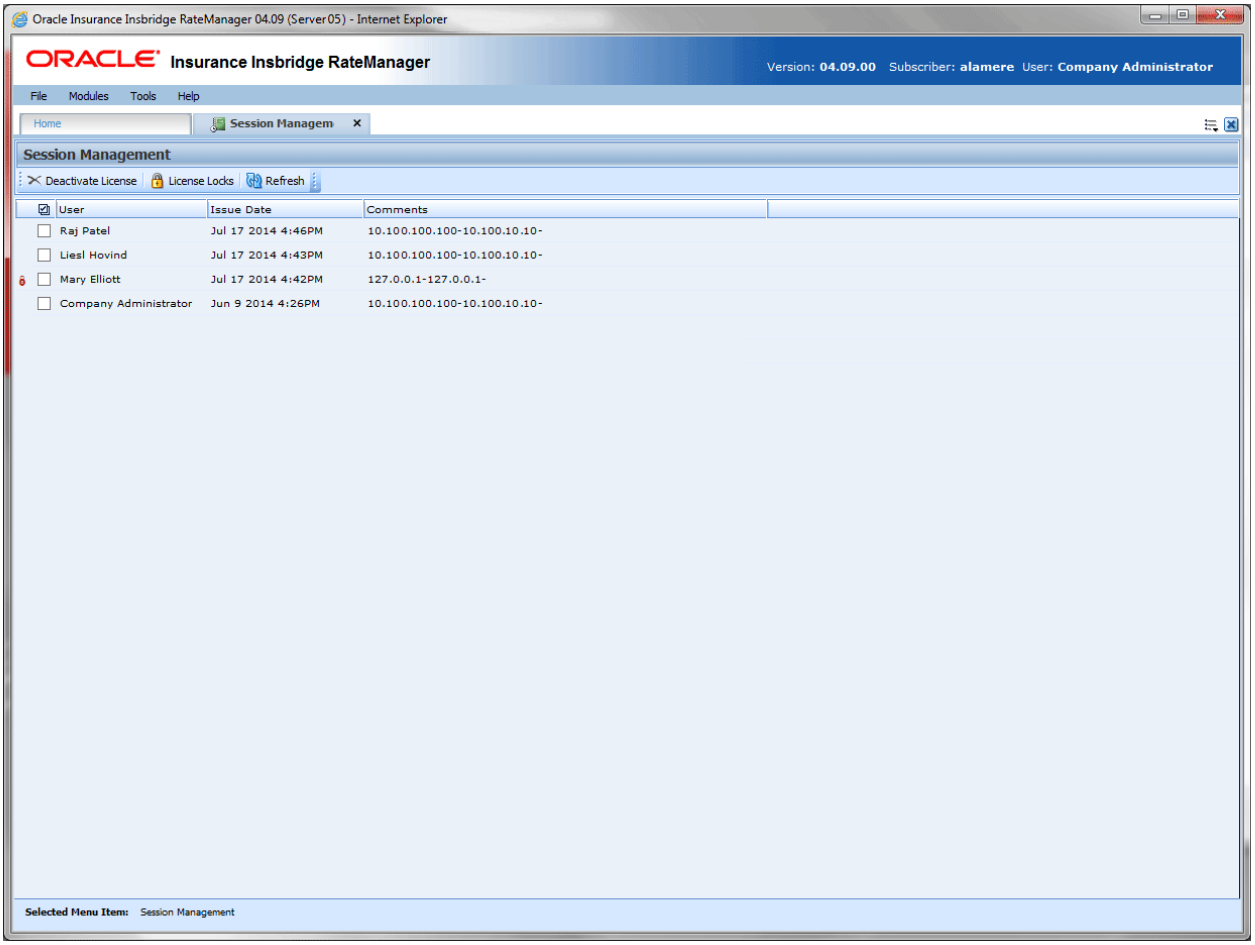


Figure 61 Session Management

From this tab you can:

- Deactivate a License
- Display the users who have an Element or Program Lock

Session Management Functions

Deactivate License	**Deactivate License:** Deactivates the license of the selected user. This will immediately end their session.
License Locks	**Edit:** Unlocks a locked element by forcing an edit tab to close. Any changes made on a forced close tab will not be saved.

Refresh	**Refresh:** Refreshes the list of open sessions.

Session Management Fields

The main body of the tab displays the sessions that are currently open. There are four fields in the main body of the Session Management tab.

Checkbox: Check this box to perform an action on this session.

User: The name of the user who has a session open.

Issue Date: The time stamp that the session began.

Comments: The IP or URL of the open session.

: Indicates that this user has an element open. Open elements are locked to prevent users from overwriting each other's work. If a user has had an element locked for an extended period of time, the session can be ended. This frees the element to be worked on by other users.

DEACTIVATING A SESSION

If a user quits RateManager without first logging out, their session may remain open. In this event, you need to deactivate the session. Deactivating a session will also release any locked elements that this user may have outstanding.

Deactivating a Session

1. Navigate to the Tools->Security->**Session Management** tab.
2. Place a checkmark next to each session you want to deactivate (free up) and then click **Deactivate License**.
3. You will be asked to confirm the deactivation.

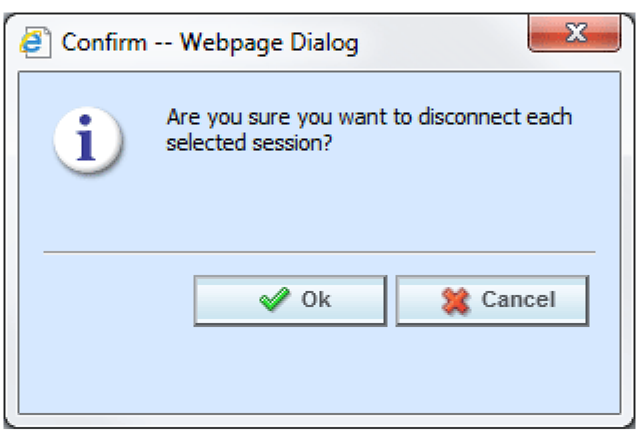


Figure 62 Confirming a Deactivation

4. Click **OK** to deactivate the session or **Cancel** to return to the Session Management tab.

UNLOCKING ELEMENT LOCKS

If you want information about a session lock, you can view information about who has an element locked by holding your cursor over the In-Use icon found on the Program Details tab.

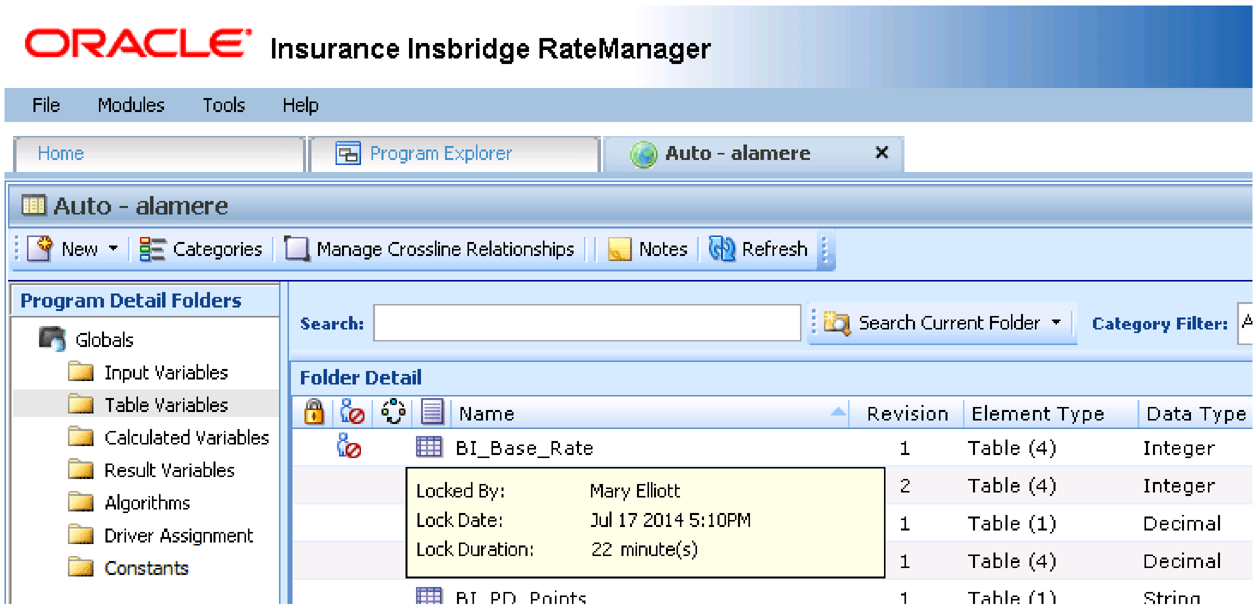


Figure 63 User Session with Extended Locked Element

If you want the element to be released, the system administrator can end the session of the user who is locking the element. This frees the element up, allowing other users to access the element.

NOTE: *Prior to ending a user session, verify that the element has been locked for an extended period of time. Ending a user session prior to the element being saved may result in the user's updates not being implemented.*

Deactivating a User Session

The License Lock option displays the details of the element lock in Session Management.

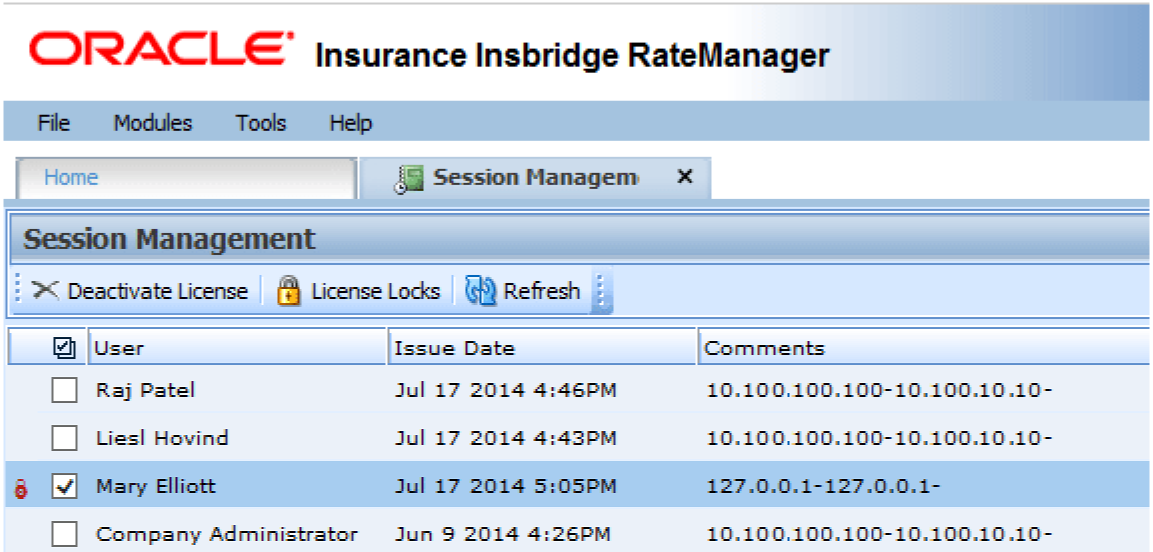


Figure 64 Ending a User Session with a Locked Element

1. To view how long this user has had a lock on the element, place a check mark in the box next the user.

2. Click **License Locks**. A popup window is displayed indicating which element the user has locked and for how long.

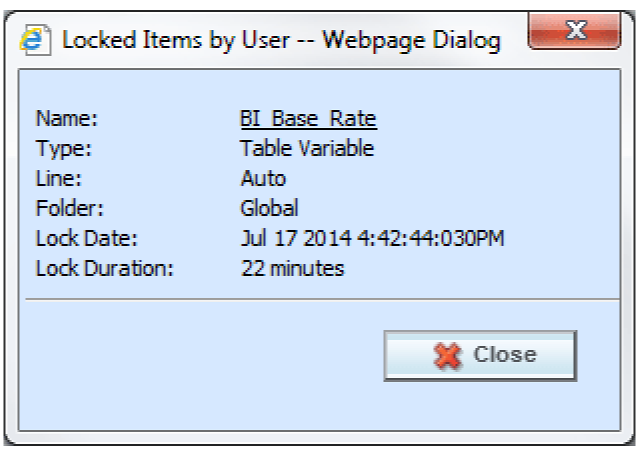


Figure 65 Locked Items by User

3. The Locked Items by User box is for information only. No action can be performed here. If you need free this element and end this user's session, you can deactivate the session.

4. Close out the Locked Items by User popup.

5. To deactivate the session, place a check mark in the box next to the user.

6. Click **deactivate license**.

7. Click **OK** to confirm the disconnect, click **Cancel** if you do not want to disconnect the user session.

DATABASE

The Database Module can be found on the Tools menu. The Database module is where you manage database functions from within RateManager. There are two options you can select:

- **Backups** – used for creating and restoring database backups.
- **Updates** – a listing of available updates for this version of RateManager.

BACKUPS

The backup tab located in the Database option of RateManager allows an administrator to create and restore backups of the RateManager database. **You must be a Disk Admin to perform backups or restores**.

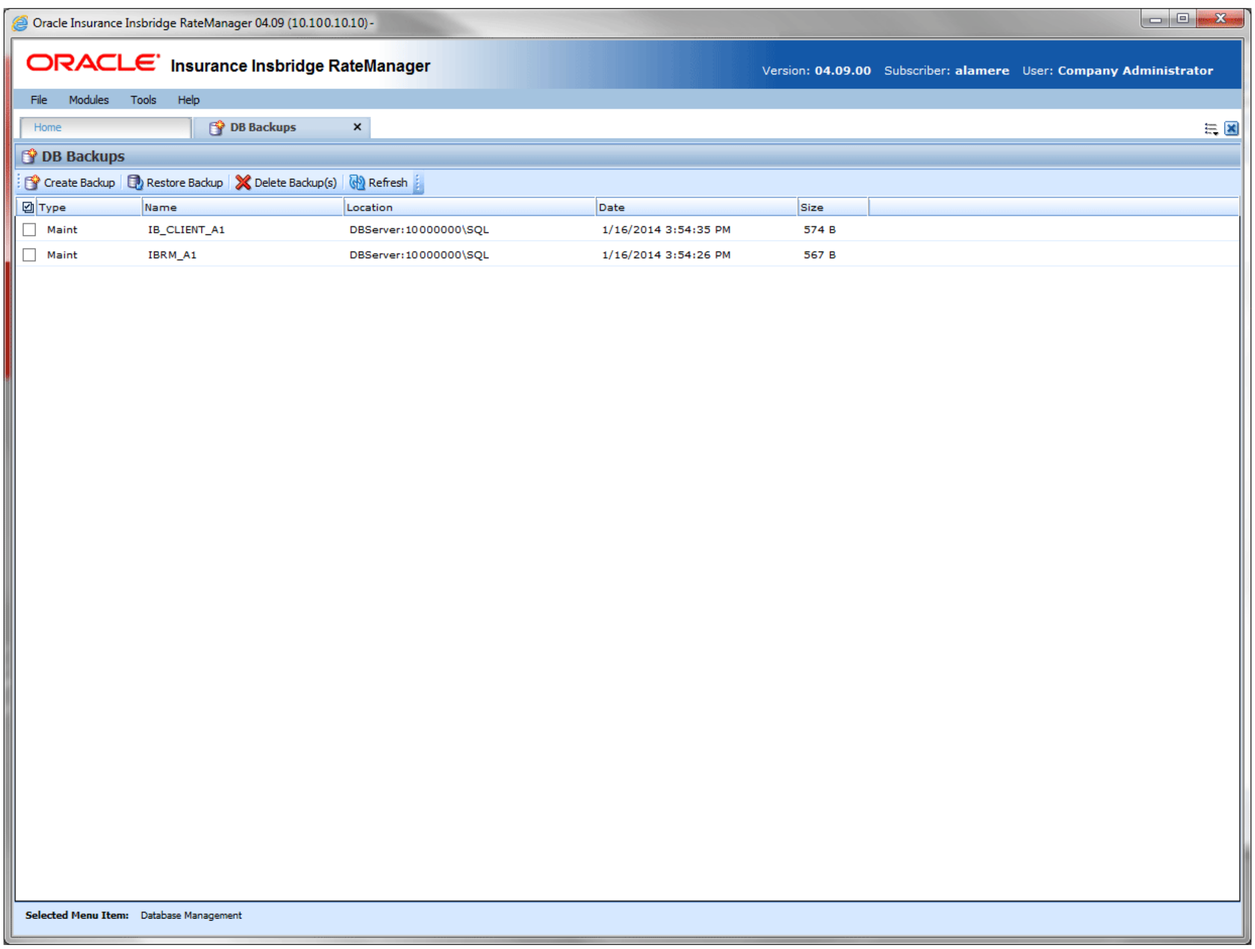


Figure 66 Database Backups

DB Backups Functions

Create Backup	**Create Backup:** Creates a backup of the currently selected database.
Restore Backup	**Restore Backup:** Restores the currently selected database.
Delete Backup(s)	**Delete Backup:** Deletes the currently selected database.
Refresh	**Refresh:** Refreshes the list of backups.

DB Backups Fields

The main body of the tab displays a list of the current backups. There are six fields in the main body of the DB Backups tab.

Checkbox: Check this box to perform an action on this backup.

Type: The type of backup performed, either Maintenance or Error.

Name: The name of the database being backed up.

Location: The location of the backup.

Date: The time stamp of the backup.

Size: The size of the backup.

CREATING A BACKUP

If you need assistance implementing logic or an error is found in the system, a backup or snapshot can be made of the database. That snapshot can then be sent to Oracle Insurance Support, where it will be restored. Our support personnel and analysts can then work from the snapshot to determine the best way to implement logic or diagnose a problem.

Creating a Database Snapshot

1. Navigate to the Tools->Security->**Backups** tab.
2. Click **Create Backup**. This opens the **RateManager Backup** window.

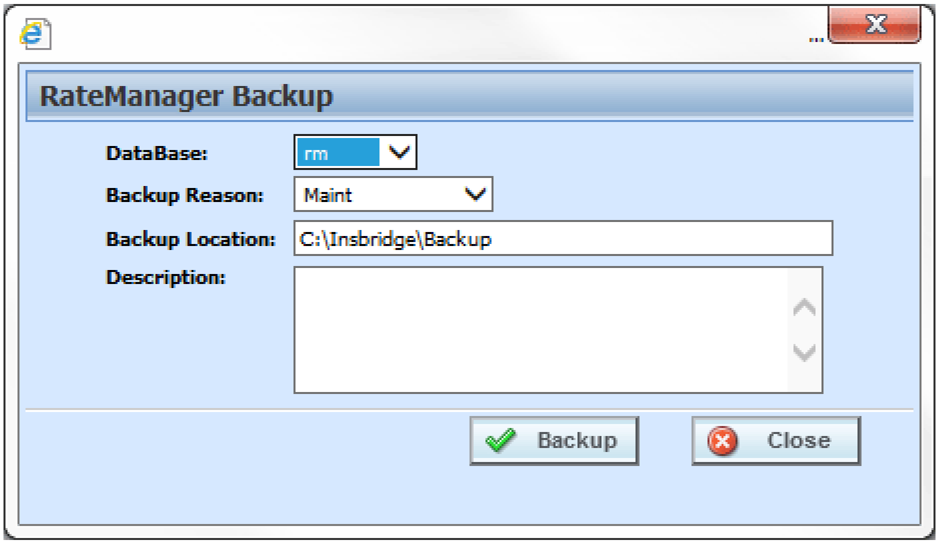


Figure 67 Creating a Backup

3. Select the database you want to backup, either **security** or **rm** (RateManager). When creating a backup to send to Oracle Insurance, select your **rm** database. The Name on the screen will default to the actual name of the database in SQL Server.
4. Select a reason for the backup, either **Maint** (maintenance) or **Error**.
5. Enter a location where the backup should be stored. This location should be a network share.
6. Click **BACKUP** to start the backup process.
7. You will be informed when the backup operation is complete.

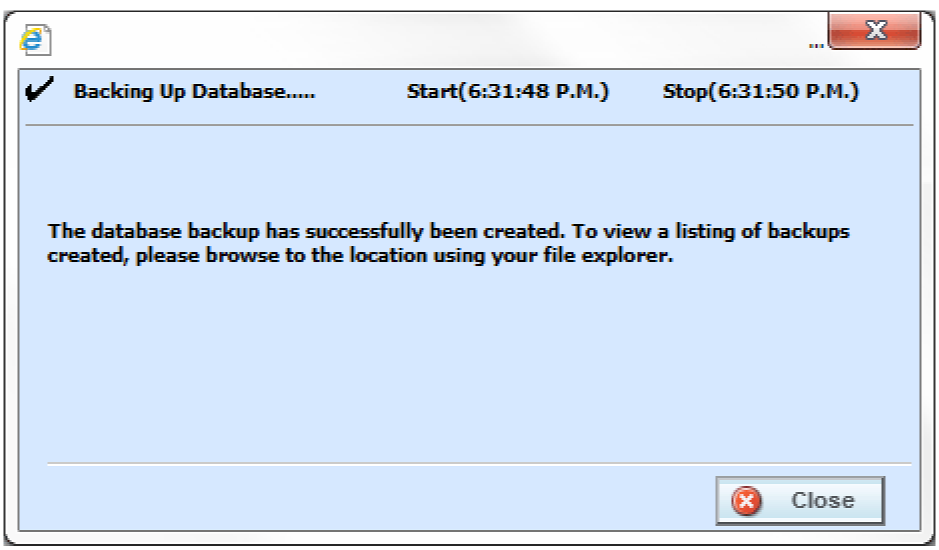


Figure 68 Successful Backup Message

8. Your backup should be listed on the backups tab. If your backup is not listed, click **REFRESH** to refresh the screen.

Sending to Oracle Insurance

If necessary, you may need to send it to Oracle Insurance Support for assistance.

1. Once the backup is complete, you can browse to the backup location you entered in Step 5. Sort the listing by Date Modified to quickly find the backup you just created.

2. If necessary, Oracle Insurance Support will instruct you how to handle the database handoff.

RESTORING A BACKUP

1. If there's a backup that needs to be restored, highlight the backup you want to restore and click **RESTORE BACKUP**. A warning message will be displayed.

NOTE: *If you require assistance or are unsure of whether or not to restore a backup, please log a Service Request using My Oracle Support at https://support.oracle.com/.*

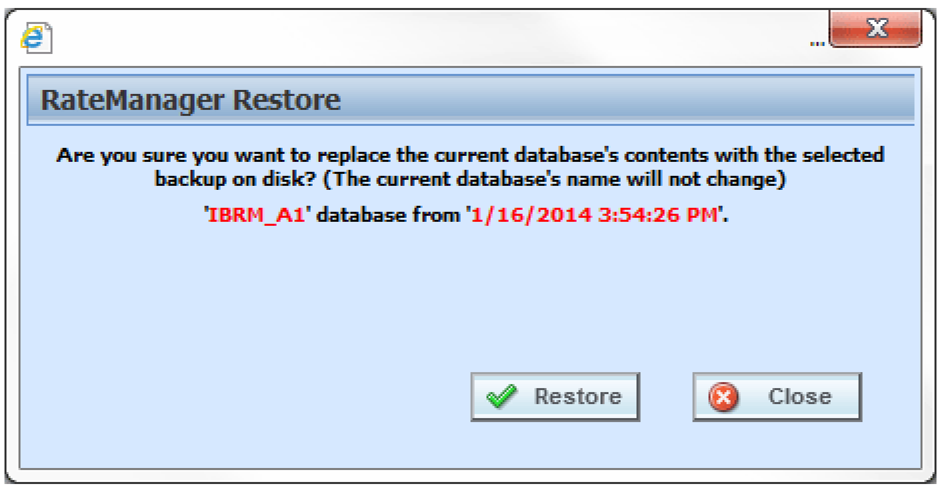


Figure 69 Restore Warning Message

2. Click **Restore** to restore the backup or **Close** to return to the previous screen.

DELETING A BACKUP

If there's a backup that you no longer need, you can delete it. Make sure this is the action you want to take.

1. Highlight the backup(s) you want to remove. More than one backup can be deleted.
2. Click Delete Backup(s) from the top bar menu. A warning message will be displayed.
3. Click **OK** to remove the backup(s) or **Cancel** to return to the previous screen.

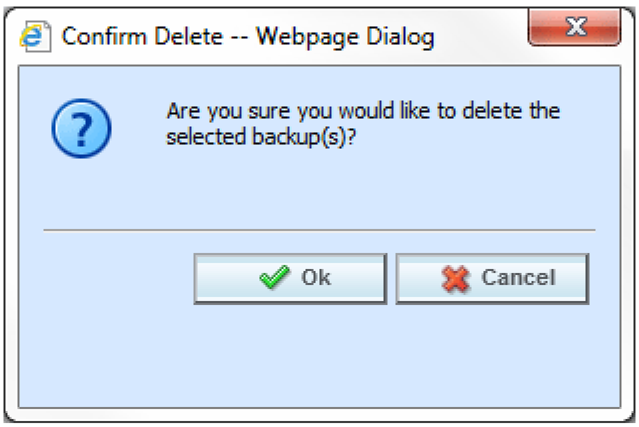


Figure 70 Deleting a Backup

Permissions Error

If you do not have the proper permissions to run database backups or restores, you will receive an error message.

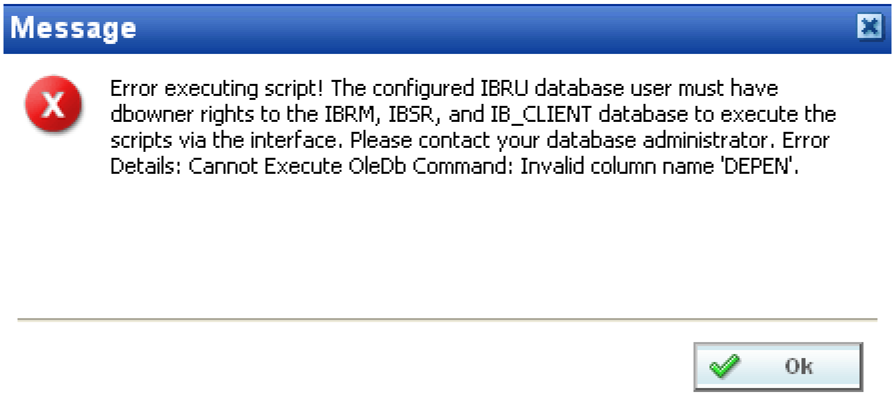


Figure 71 Permissions Error Message

Database Backup Location Error

If you do not have a proper backup location set up, either on the server where your databases are located or a network share, you will receive an error message.

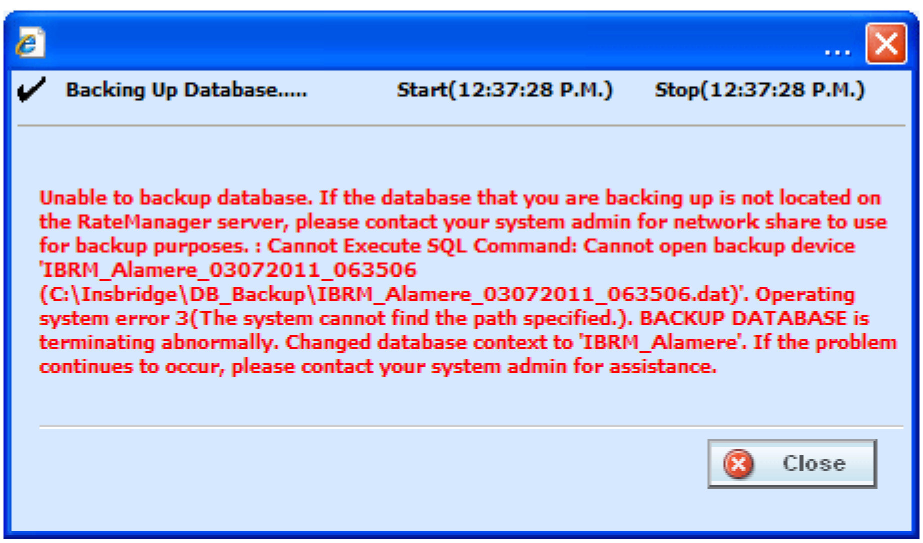


Figure 72 Backup Location Error Message

In Figure 59, a backup location was entered (C:\Insbridge\DB_Backup…), but the location was not found. Entering a location in the Preferences area of RateManager will not create the location. The location must be in place prior to the backup.

When a shared location on the server where the RateManager databases are located is entered, the backup request can be performed.

DB UPDATES

The database module also contains an update tab that lists the available updates for this version of RateManager.

From this tab you can view the update script or execute the update. Updates cannot be deleted.

NOTE: *Only a database owner (db_owner) can perform updates. If the Updates tab or any execute buttons are not visible, you do not have access to the database.*

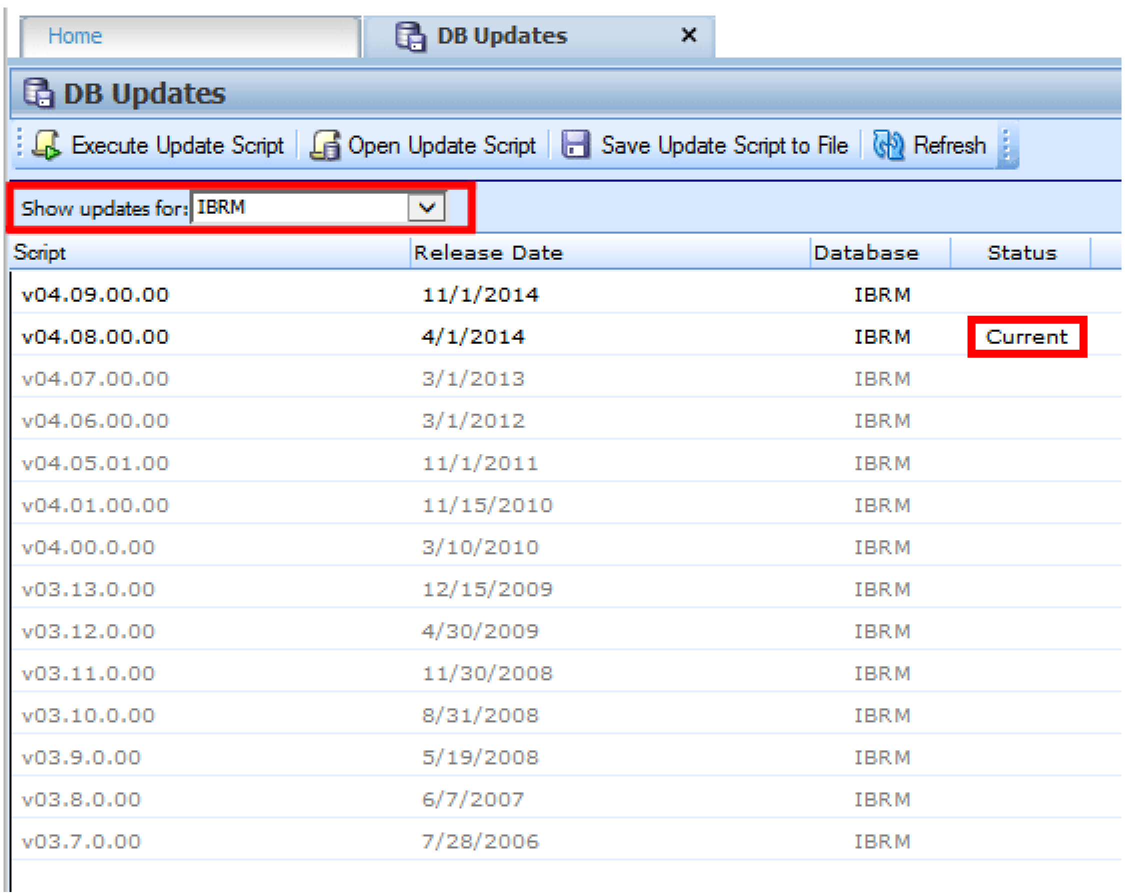
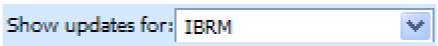


Figure 73 DB Updates

DB Updates Functions

Execute Update Script	**Execute Update Script:** Runs the selected update script.
Open Update Script	**Open Update Script:** Opens the selected update script in a window where it can be viewed or copied.
Save Update Script to File	**Save Update Script to File:** Allows you to save the update script

	to your local hard drive or network.
	**Refresh:** Refreshes the list of updates scripts.
	**Show Updates for:** Allows you to select the update scripts you want to view, IBRM or IB_CLIENT.

DB Updates Fields

The main body of the tab displays a list of database updates. There are four fields in the main body of the DB Updates tab.

Script: The name and version of the script.

Release Date: The date of the release for the script.

Database: The type of database the script is for, IB_CLIENT or IBRM.

Status: The status of the update. Current will be on the line of the most current database.

EXECUTING UPDATE SCRIPT

Database updates can be done on the IB_CLIENT database and the IBRM database. If you log into RateManager and Tools is the only option, you must perform a database update.

On the Updates tab, the current version will be highlighted and the status will be *Current*. The updates below the current version will be grayed out. These updates cannot be run again. You will receive an error message if you attempt to run a lower version update. Any version update above the current version will also be grayed out but will be available for executing after the preceding update has been run.

Updates have to be installed sequentially, meaning if you are on Version 3.12, you must run the 3.13 update, the 4.00 update, the 4.01 update and finally the 4.06 update. If you attempt to run an update that is more than one level above the current version, you will receive an error message.

NOTE: *It is strongly recommended that database updates be performed in RateManager.*

1. Navigate to Tools→Database→**Updates**.
2. The **DB Updates** tab is displayed. Select the database you want to view from the **Show updates for** drop down. The database updates for your selection will be listed. The last column, the **Status** column, shows you which update is the **Current** one installed.

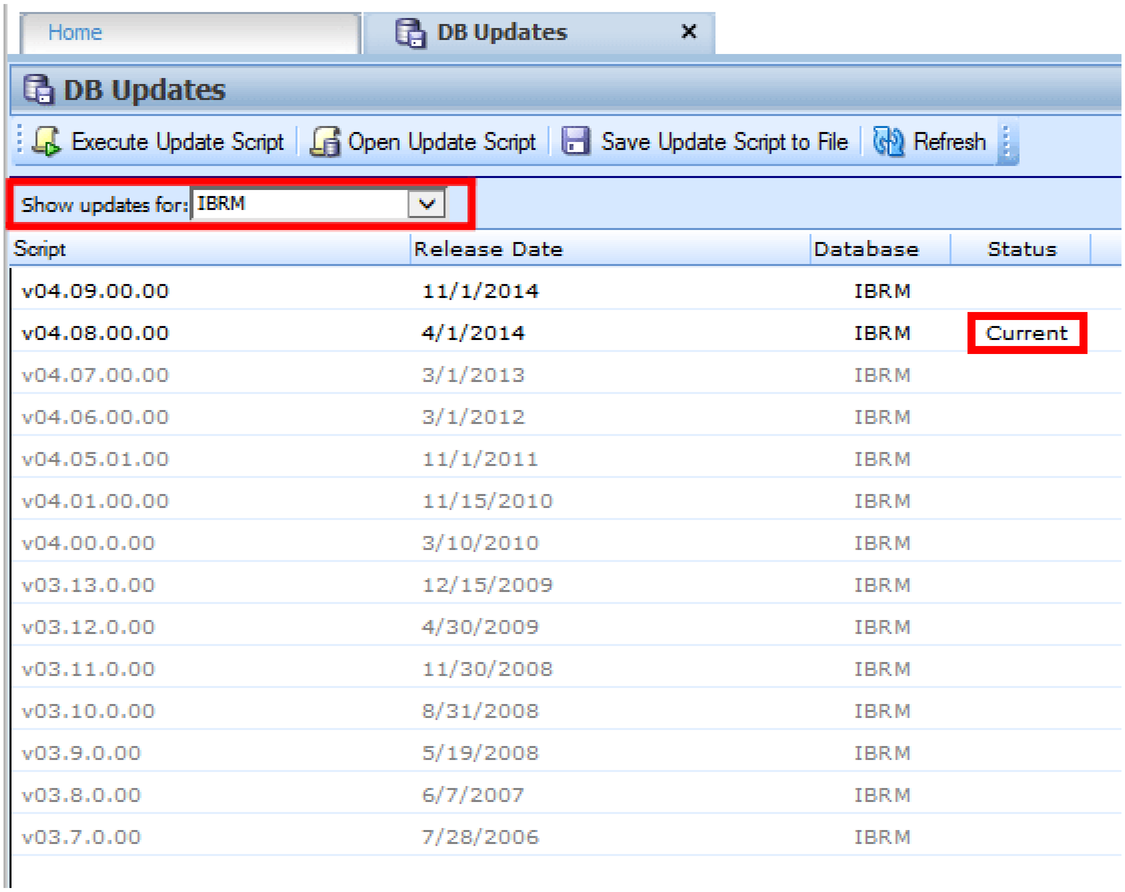


Figure 74 Available Updates

3. There are two ways to execute an update:

    a. **Directly in RateManager**
    b. **In SQL Server**

Directly in RateManager

This is recommended way to update a database. It is recommended that you start by selecting the update showing Current. This will assure that the database showing as Current will have all possible updates.

4. Highlight the update you want to run.

5. Click **Execute Update Script**. A warning message will be displayed.

6. Click **OK** to run the update or **Cancel** to return to the previous screen.

7. Do this for both the IBRM database and the IB_CLIENT database.

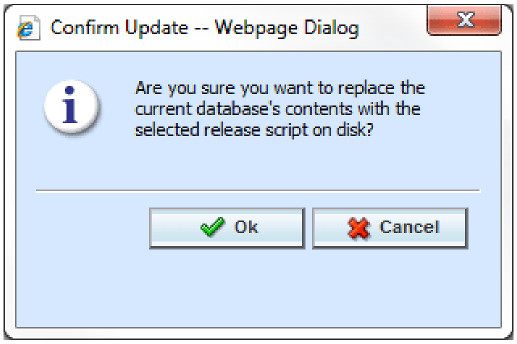


Figure 75 Updating Scripts in RateManager

In SQL Server Using Query Analyzer

This method should be performed by a database administrator. You must have access to the SQL Server instance where the RateManager databases are located. **No warning message will be displayed if you execute scripts in the wrong order.** You must know the name of the databases you are updating. **If you are unsure, do not use this method**.

WARNING: *Running updates in a non-sequential order may result in severe database errors. No error messages will be displayed if you run updates in an incorrect order.*

---

1. In RateManager, highlight the update you want to run. If you are going from a much lower version of RateManager, you may have to save multiple files for each database.

2. Click **Save To File**. Your computers dialogue box will be displayed. **Save** the file to a location of your choice. For IBRM scripts, it is recommended that you rename the file to usp_IBRM_R0(version number).sql. For example the V4.08.00 update would be: usp_IBRM_R40.08.00.00.sql. For IB_CLIENT scripts, it is recommended that you rename the file to usp_IB_CLIENT_R0(version number).sql. For example the V4.08.00 update would be: usp_IB_CLIENT_R04.08.00.00sql.

3. Open Query Analyzer in SQL Server.

4. Open up the DB script updates from the download file. You can open in any program you want, such as Notepad.

5. Select the IB_CLIENT database. Create a new query.

6. Copy the DB script you opened to the query screen.

7. Execute the script. Any messages will be displayed in the lower portion of the screen. Fix any errors before you continue.

8. **Updates must be run in sequential order**.

9. Do the same for the RM database.

10. After the scripts have been run, return to RateManager. Click **File→Reload**. The status should show current and the full RateManager menu should be displayed.

Open Update Script

To view the update script prior to execution, highlight the update you want to view. Click **Open Update Script**. The update script is displayed in a separate screen.

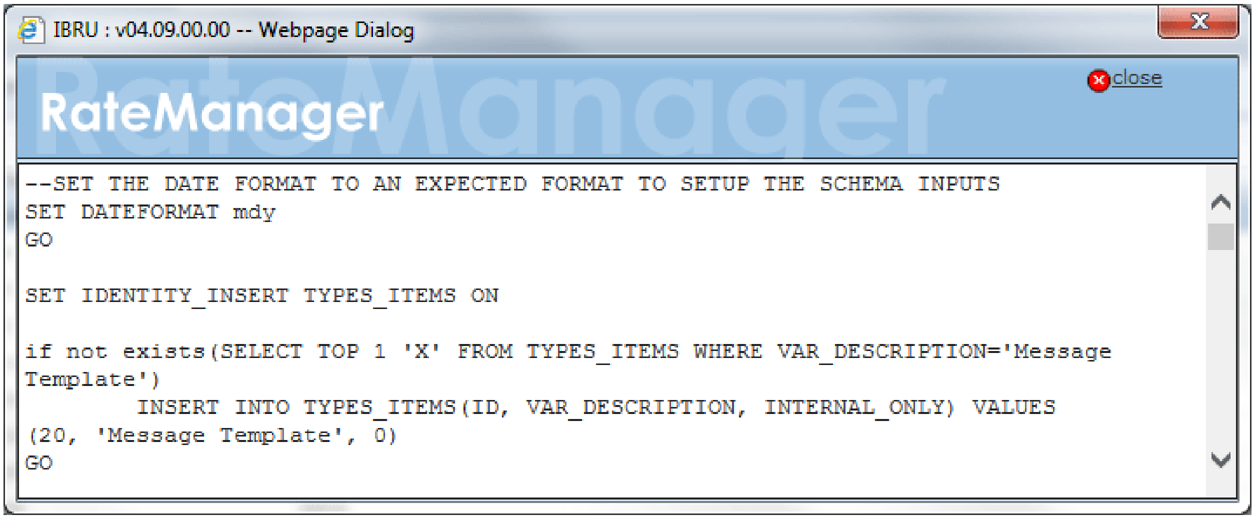


Figure 76 Script Viewer

REQUIRED UPDATES

If you log into RateManager and Tools is the only option, you must perform a database update.

Please navigate to Tools→Database→Updates (Tab) and run the necessary updates. You will not be able to continue until you run the updates.

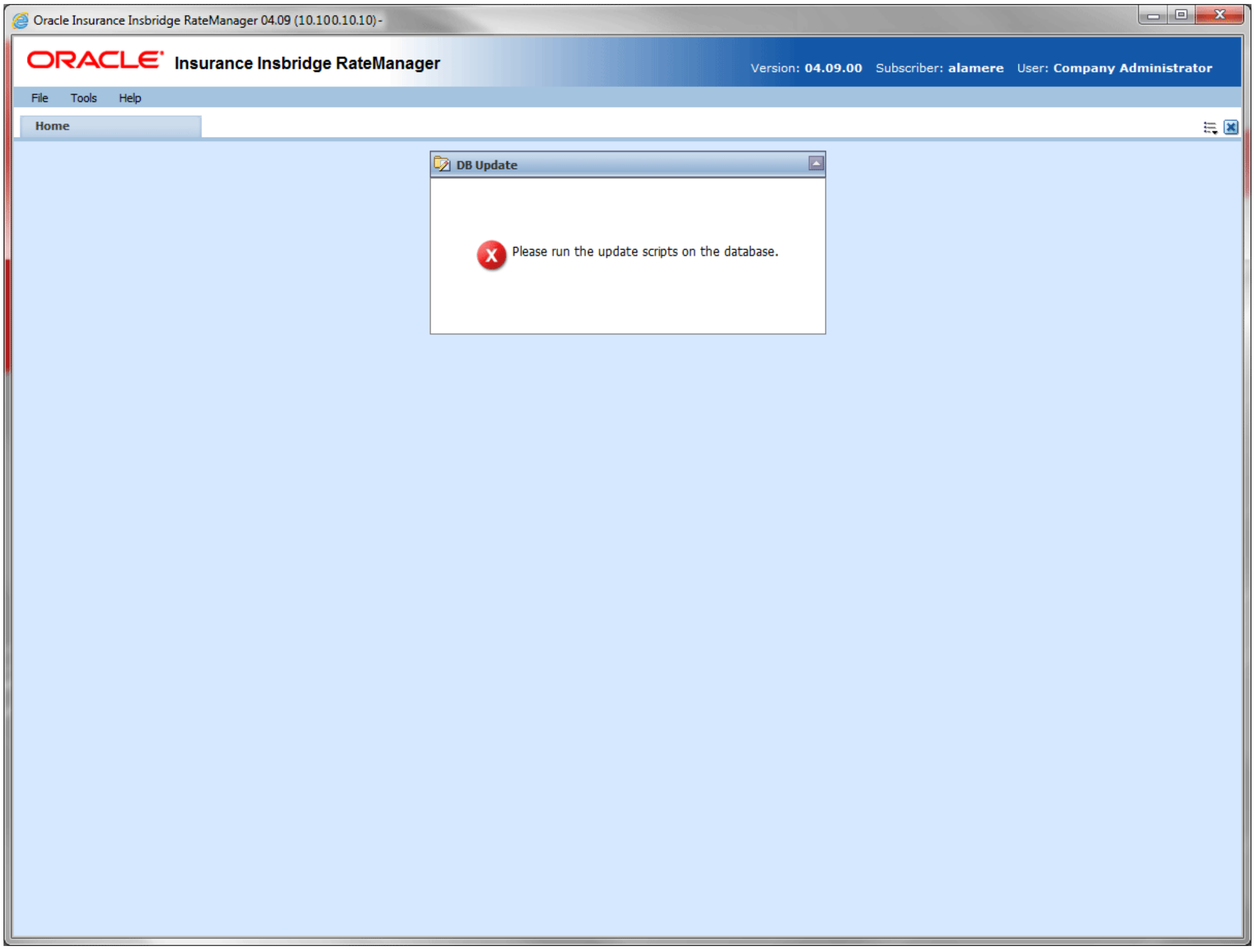


Figure 77 Please Run Update Scripts

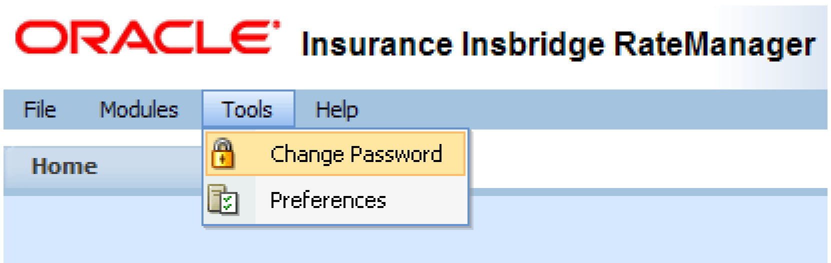
Chapter 7

CHANGING YOUR PASSWORD

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

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

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



2. This opens the **Change Password** window.

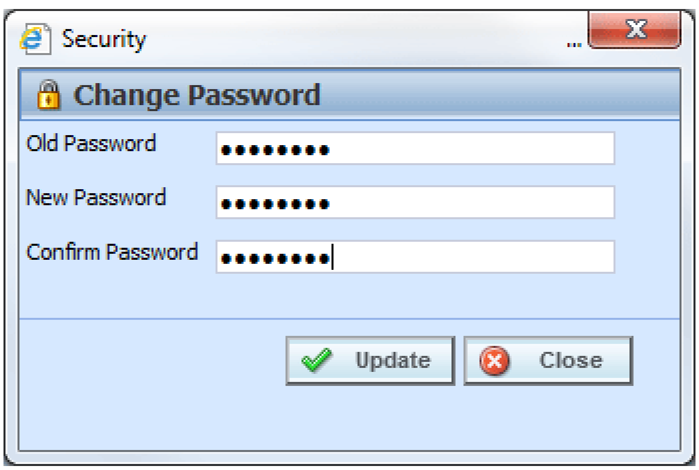


Figure 78 Change Password Screen

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

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

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

Chapter 8

PREFERENCES

Users with Administration rights can access all the options found on the Preferences screen. The Preferences screen allows administrators to manage settings, and set Home Page options.

Non-administrators only have the option to set their Home Page Snaps. Please see the RateManager User Guide.

SYSTEM SETTINGS

Administrators can edit system settings at any time from the Preferences screen. Changes will take place after the user sessions have been ended.

Changing System Settings

1. Select Tools→Preferences. This opens the **Preferences** window.

2. Select **System**. This option is displayed only if you are an administrator.

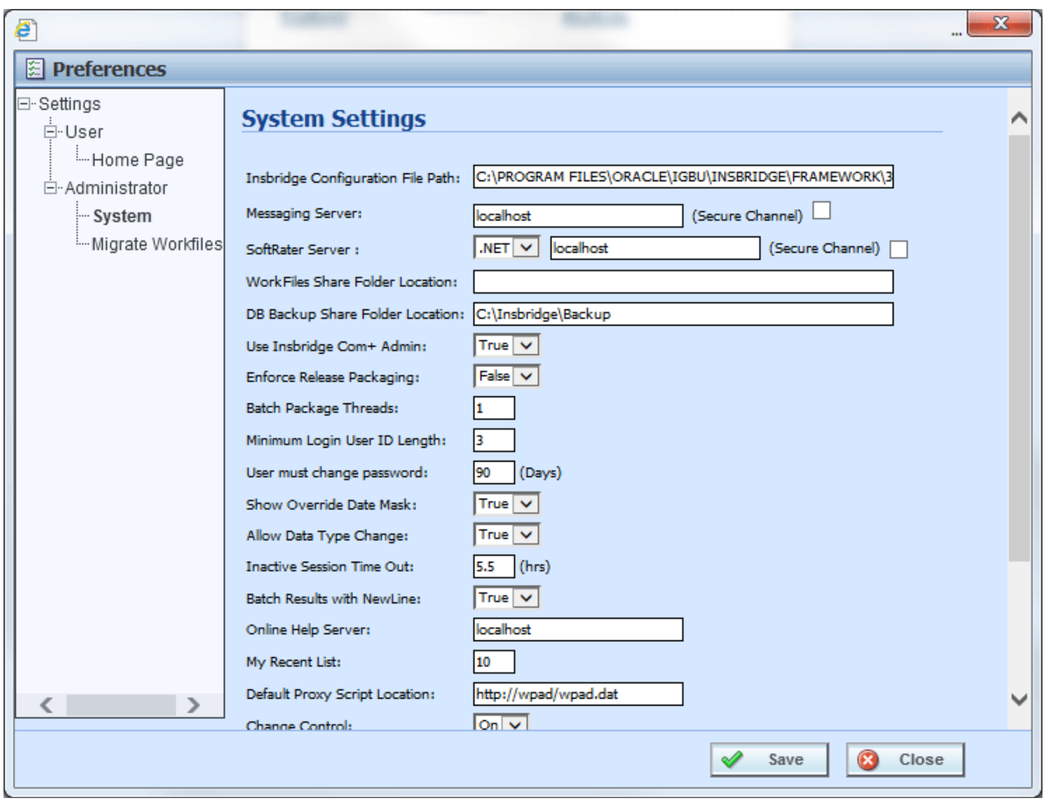


Figure 79 Preferences Settings

3. Make any necessary changes.

4. When you are finished, click **Save** to update your settings. If you want to changes to take place immediately, you may have to end all user sessions.

System Setting Options

From the Preferences screen, you can set pathways, define servers, and set preferences for a variety of options in RateManager. Most of these options are set at installation but can be updated at any time.

Insbridge Configuration File Path

The path of the configuration file found in IBFA. This pathway must match the IBFA path. You may need to change this path if you have changed the path in IBFA. Please contact Insbridge support for further information.

It is strongly recommended that you leave the default.

Messaging Server

RateManager is set up to run batches on the same server that RateManager is located on. If you have an especially large batch to run and you want to batch to a different server, you will have to change server locations here. Unless necessary, it is strongly recommended that you leave the default.

SoftRater Server

If you need to rate on another server, you will have to change server locations here. It is strongly recommended that you leave the default.

Work Files Share Folder Location

A shared WorkFiles location allows for multiple instances of RateManager to share the same WorkFiles. The Insbridge server and the shared location must be on the same domain. The Insbridge user must be on the domain also. If the filed is blank, the default Workfile location is used.

For instructions on setting up a WorkFiles Share Location, please see the Insbridge WorkFiles Installation Guide on the http://www.oracle.com/technetwork/documentation/insurance-097481.html

DB Backup Share Folder Location

When you make backups of the RateManager database, you can specify the location of the backup file. If the location is local, use a local path. If the location is not local, you must be a disk admin to change.

If the database is on a remote server, a share is needed for the backup location. The Insbridge user must have write access to this location as well.

Use Insbridge Com + Admin

This setting must always be true. If there is a conflict, please contact Oracle Insurance support.

Enforce Release Packaging

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.

Batch Package Threads

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

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

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

Minimum Login User ID Length

This is the minimum number of characters required for a user ID.

User must change password

This where you set the number of days before a user is required to change his/her password. This setting will only be active when you elect to have users change their password on the user setup screen.

Show Override Date Mask

If enabled, a date mask for ‘Date’ data types will be displayed when importing a table. If not enabled, this field will not be visible.

Allow Data Type Change

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.

Setting this option to True allows RateManager users change the data type of a variable or input. Setting this option to False does not allow users to change data types.

Inactive Session Time Out

This is the amount of time that a user sits inactive before being automatically logged out of the system.

Batch Results with New Line

Allows batch results to 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.

Online Help Server

Online help is installed with RateManager. This setting is the default server name where RateManager currently resides. Either a server name or an IP address can be entered here. If needed, you can change the name of the server. For example, if the machine name is not the same as the host name, you may need to change the name in order for online help to function.

My Recent List

My Recent List is a snap setting. Snaps are modules that contain information or links to elements that the user recently worked on. You can set the maximum number of elements to display in a snap. The default is for the snap list to be limited to 10.

Default Proxy Script Location

The Default Proxy Script Location setting may be needed if you elect to use the Oracle Insurance Blog Feed snap. This setting can be used for RSS feeds.

Change Control

If change control is on, it is mandatory for users to enter a change control entry and justification to any element or program when it is revisioned. If change control is off, the option is not presented.

Maximum Amount of Simultaneously Opened Tabs

Use the maximum amount of simultaneously opened tabs setting to set the maximum number of tabs you allow users to have opened in RateManager. The default is 15.

Debug Report Format

Select the debug report format to be used in the Test Program section of RateManager. Debug reports can be a single report format, where the entire report is listed out or in a summary report format where information is contained in sections that can be expanded and collapsed. Summary report format may be useful if large programs are to be run. This setting can be updated at a later time.

Default Naming Standard

Select the Naming Standard to be applied system. If a Naming Standard is not needed system wide, clear the field. The default is for the system default to be used. Please see Naming Standards for more information.

Enable Worksheet for Test Case Editor

Select true to have the option to create a rating or calculations worksheets in Test Case Editor. Select false and the option to create a worksheet in Test Case Editor is not presented. Please see Worksheets for more information.

MIGRATING FILES

This feature migrates work files from a previous version of RateManager to the current release. Work files are rating, pricing, mapping, and template files used in various areas of RateManager such as Impact Analysis, Library, and Testing. Migrating files allows users to access work files that were available in a previous release of RateManager. If you do not migrate work files from previous versions, users will not have access to them.

Prior to migrating files, please create backup copies of the files to be migrated. This requires access to the server were RateManager has been installed.

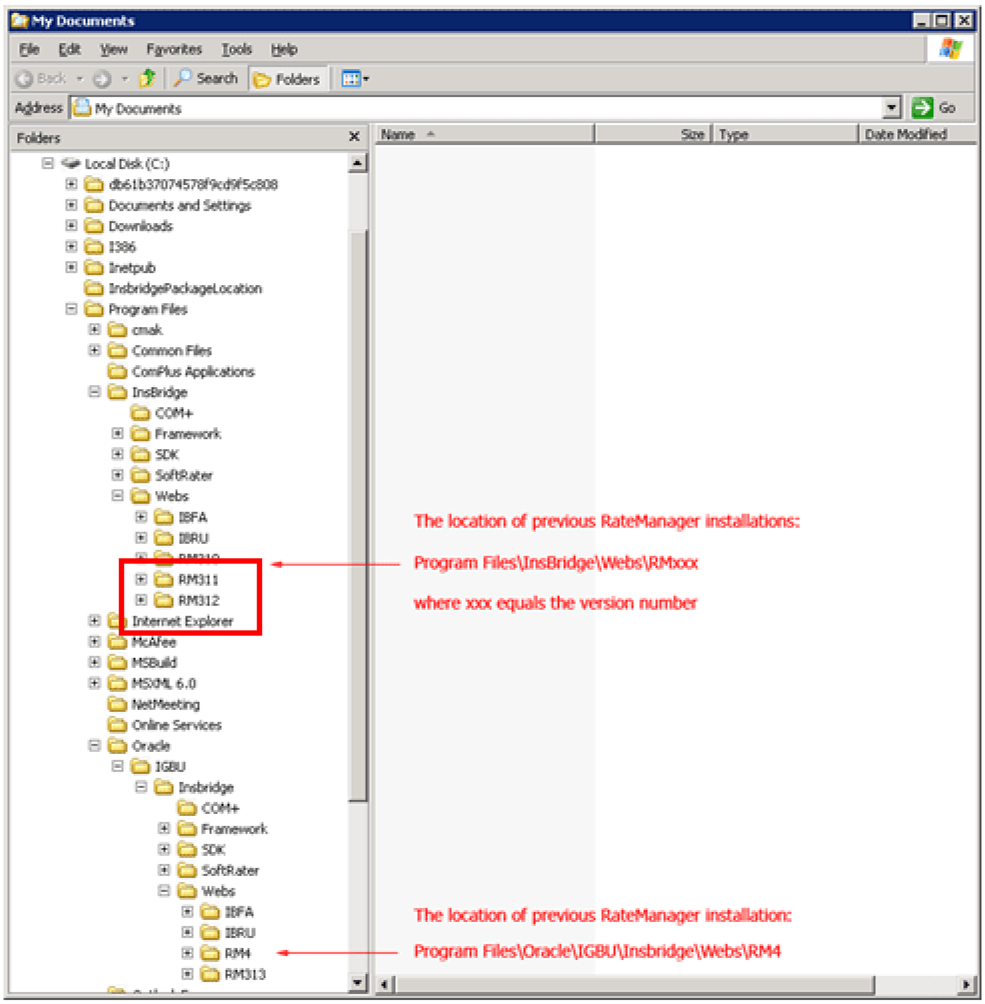


Figure 80 Location of WorkFiles

NOTE: *Prior to migrating files, you may want to create backup copies of the files to be migrated. This requires access to the server were RateManager has been installed.*

Manual Migration

A manual migration must be performed under select circumstances. All versions must be on the same server. If you are working with two separate machines, you must perform the migration manually. A RateManager migration will perform a copy and paste of the WorkFiles on the server then the previous versions WorkFiles will be deleted. This means that the version you select to be migrated will have the WorkFiles deleted from the server. This cannot be reversed. Make sure this is the action you want to take.

If you have more than one version where you want to migrate files, you will have to perform the migration on the server. **DO NOT USE RATEMANAGER TO MIGRATE MULTIPLE VERSIONS.** Only one version can be migrated. If you attempt to migrate more than one version, you will write over any data with the version that you are migrating. For example, if you migrate version 3.12 and then migrate 3.13, any information from 3.12 will be written over with the information from 3.13. If you have more than one version to migrate, you must perform the migration directly on the server.

Migrating files is a twp step process.

Step 1: Locate the previous workfiles to be migrated.

The location of the files to be migrated and the exact file name will depend upon what version of RateManager you want to migrate. There are three possible locations.

For Release 3.12 and earlier:

- **File Name:** WorkFiles
- **Location:** \Program Files\InsBridge\Webs\RM*xxx*\WorkFiles

  Where *xxx* is the version number, i.e. 310, 311, 312

For Release 3.13:

- **File Name:** Workfiles
- **Location:** \Program Files\Oracle\IGBU\Insbridge\Webs\RM313\Workfiles

For Release 4.0 To 4.8:

- **File Name:** Workfiles
- **Location:** \Program Files\Oracle\IGBU\Insbridge\Webs\RM4\Workfiles

Copy all work files for every version to be migrated and store in a safe location. In the unlikely event that an error with the migration occurs, you will have backup files that you can place directly in the RateManager (RM4) Workfiles location or restore to the previous version.

Step 2: Place in the new workfiles location.

New File Location:

- **File Name:** Workfiles
- **Location:** \Program Files\Oracle\Insbridge\Webs\RM4\Workfiles

WARNING: *Workfiles should be migrated after the initial upgrade has been run. Running the Migrate function after users have accessed the system may result in newer Workfiles being overwritten.*

Performing the Migration in RateManager

This migration process moves rating, pricing, mapping, and template files from a previous version of RateManager to the current RateManager version. You can select one version that you want to migrate. If you have more than one version to migrate, you must perform the migration manually. Please refer to the Installation and Upgrading Guide for instructions.

1. Select **Tools→Preferences→Administrator→Migrate Workfiles**.

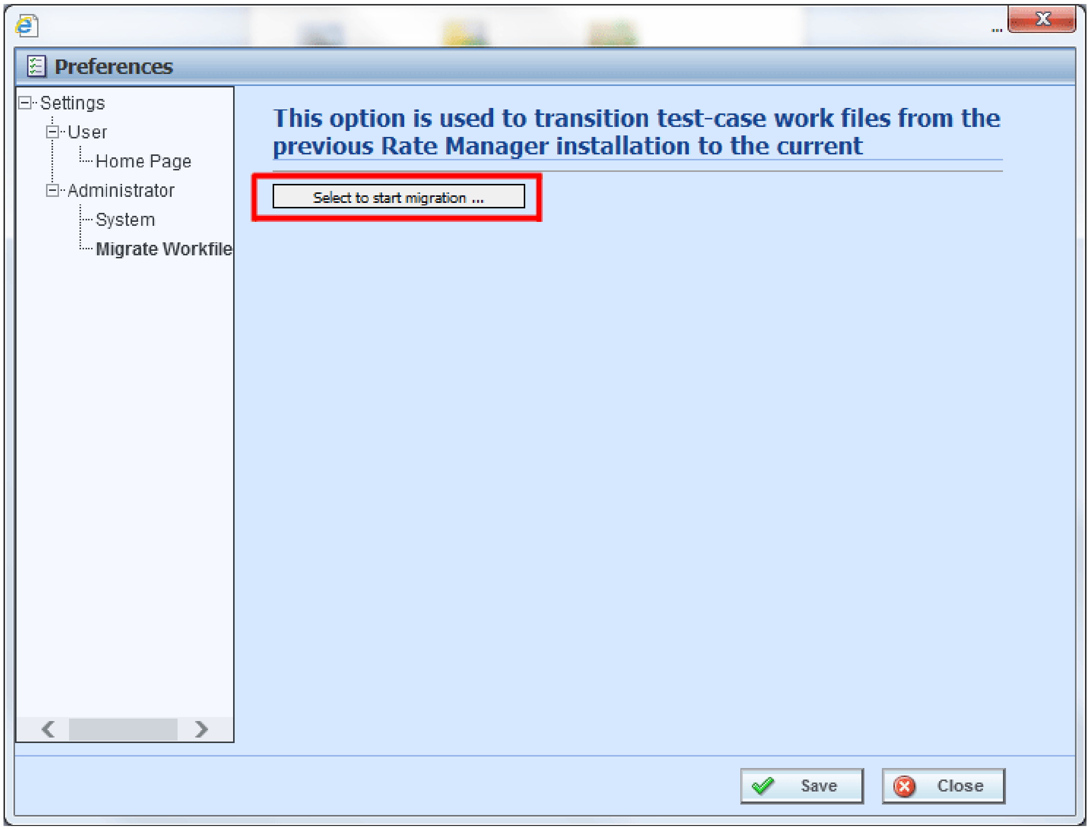


Figure 81 Migrating Work Files

2. Click the Select to start migration button. A separate screen is displayed.
3. RateManager determines the possible version to migrate. **Select** the version you want to migrate. Only work files from the selected version will be migrated.

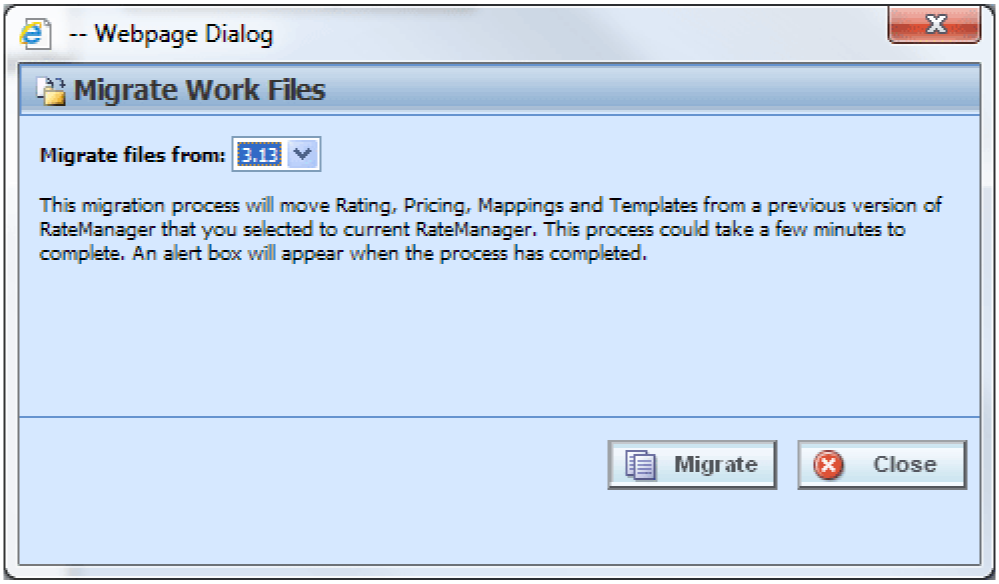


Figure 82 Selecting Workfiles to Migrate

4. Click **Migrate**.

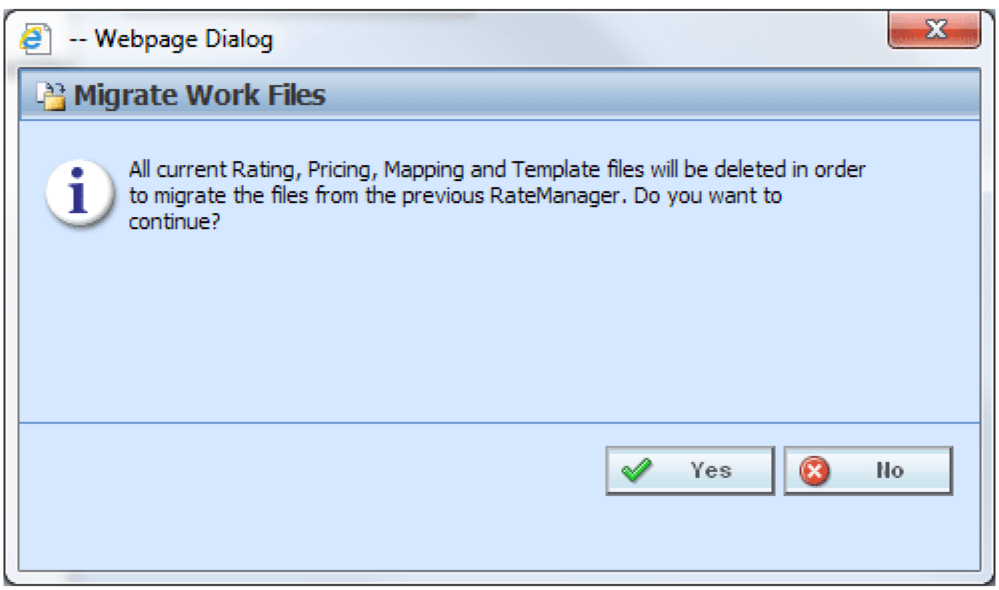


Figure 83 Confirming a Migration

5. Click **Yes** to migrate. If you are unsure about the action you want to take, click No to stop the migration process.

6. The migration will begin. This process could take a few minutes to complete. When all files have been migrated, an information notice will be displayed.

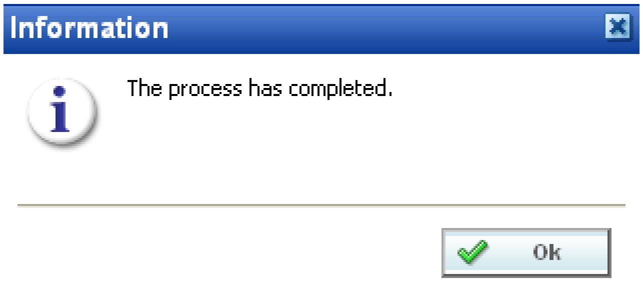


Figure 84 Successful Migration

7. Click OK to close the screen.

Verifying Migrated Files in RateManager

Migrated files are available in the same areas.

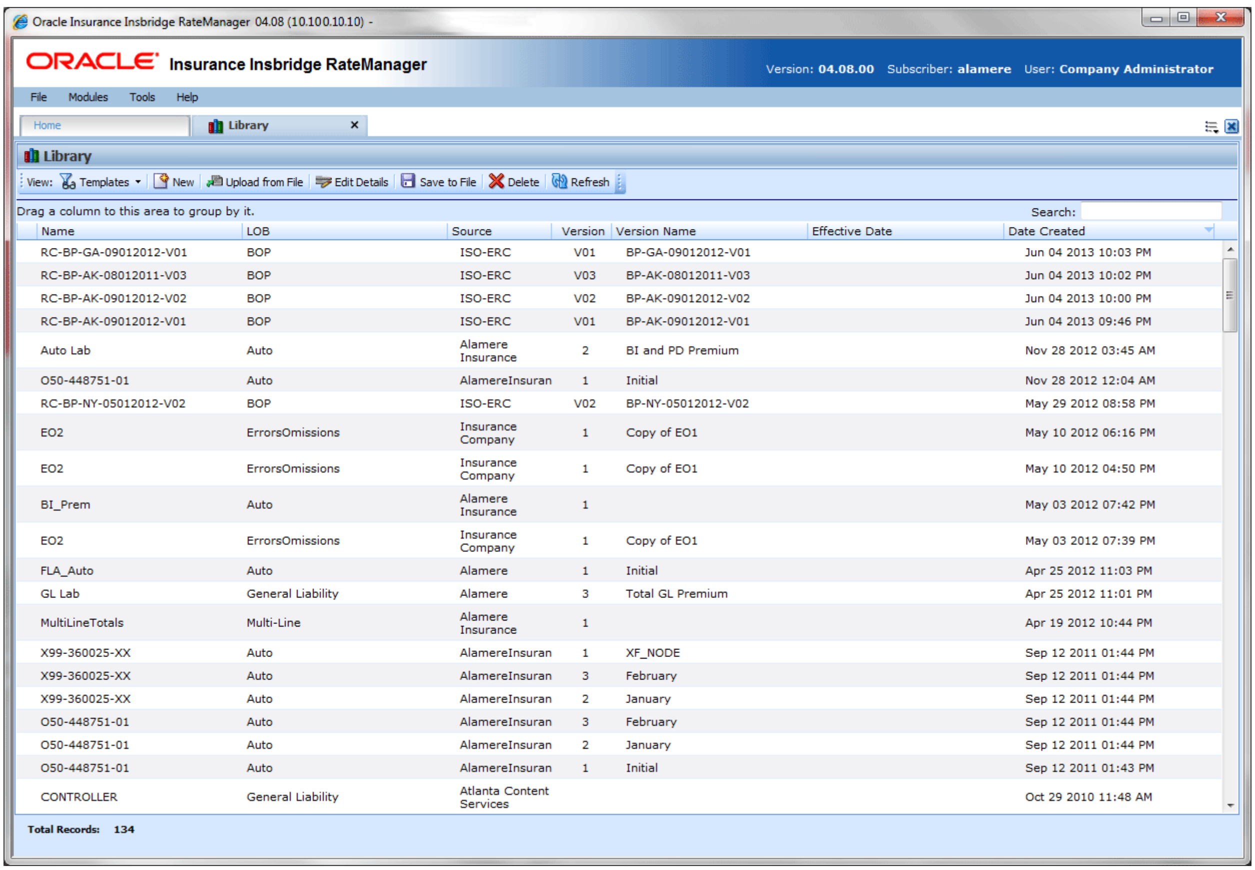


Figure 85 Verifying File Migration in RateManager

To verify that work files from a previous version have been migrated, enter an area where these files would be used, such as the Library tab.

The tab refreshes with all available files. Your files from previous versions will be listed.

NOTE: *Previous export files will not be migrated. Previous export files are not recognized in current releases of RateManager.*

Verifying the File Migration in the Server

Migrated files will be moved from previous releases into the updated RM4 Workfiles location.

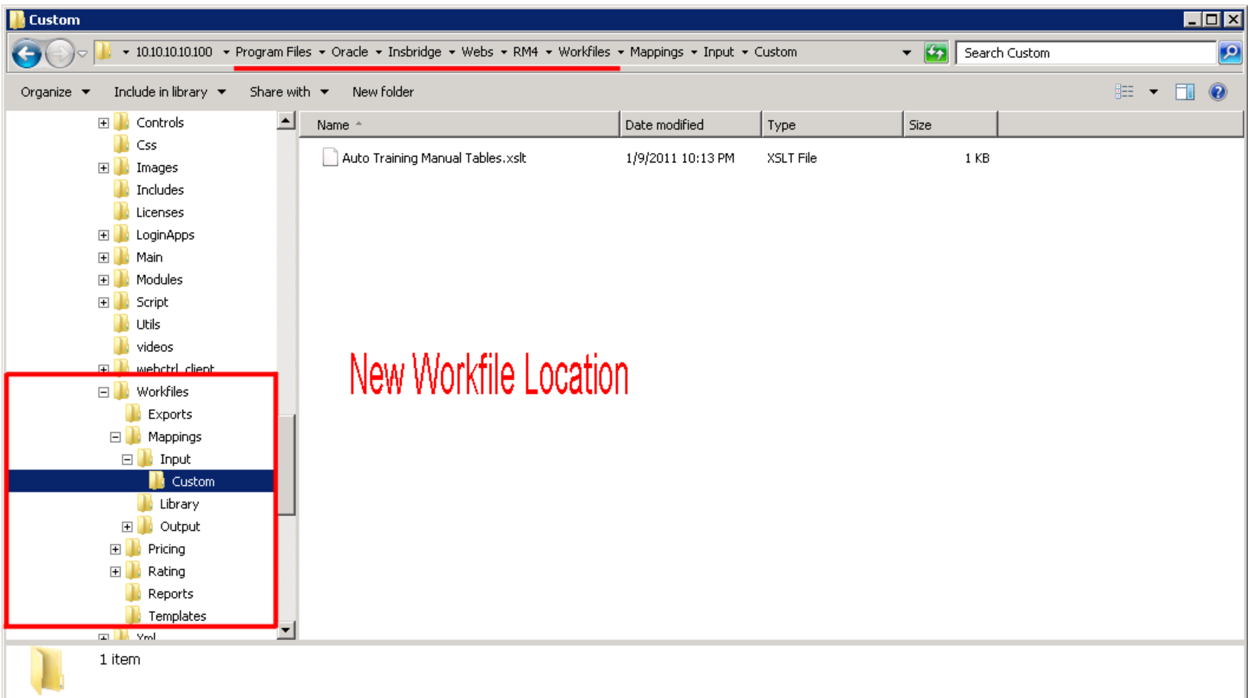


Figure 86 Verifying File Migration at Server Level

You can verify that files have been moved by looking in the \Program Files\Oracle\Insbridge\Webs\RM4\Workfiles folder.

Migration Messages

If the migration has already been done, a message is displayed.

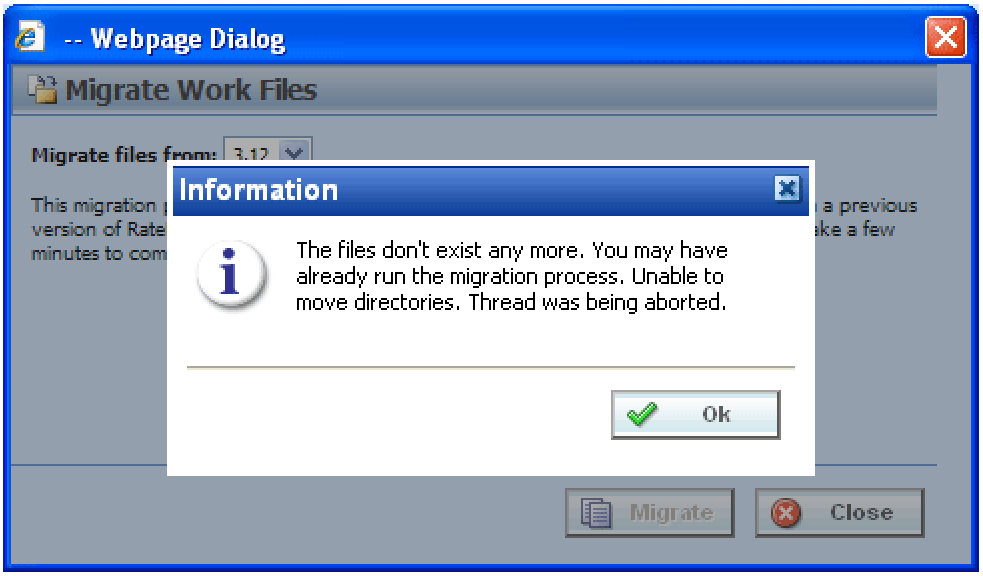


Figure 87 Migration Already Performed

If the migrating tool does not find any files to migrate, a message is displayed.

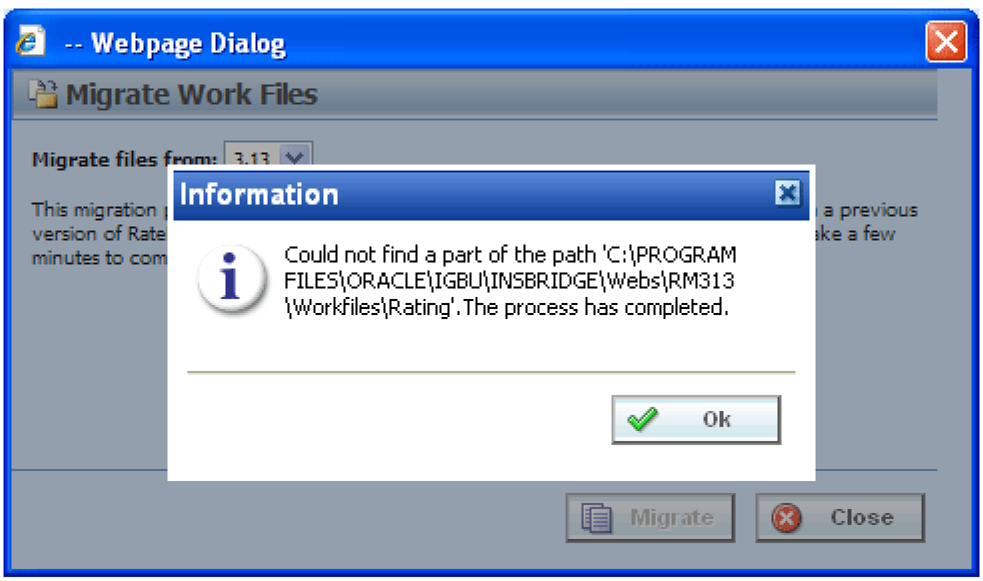


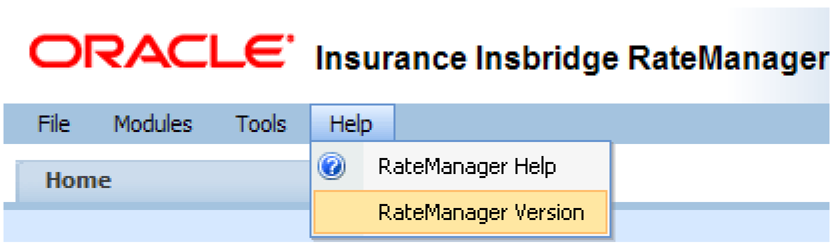
Figure 88 No Files to Migrate

VIEWING VERSIONS

The Version option in the Tools section of RateManager allows an administrator to view the version information for the current system.

To View a Version

1. From the Home tab, select **Help→RateManager Version**.



2. This will open the **Version Listing** window.

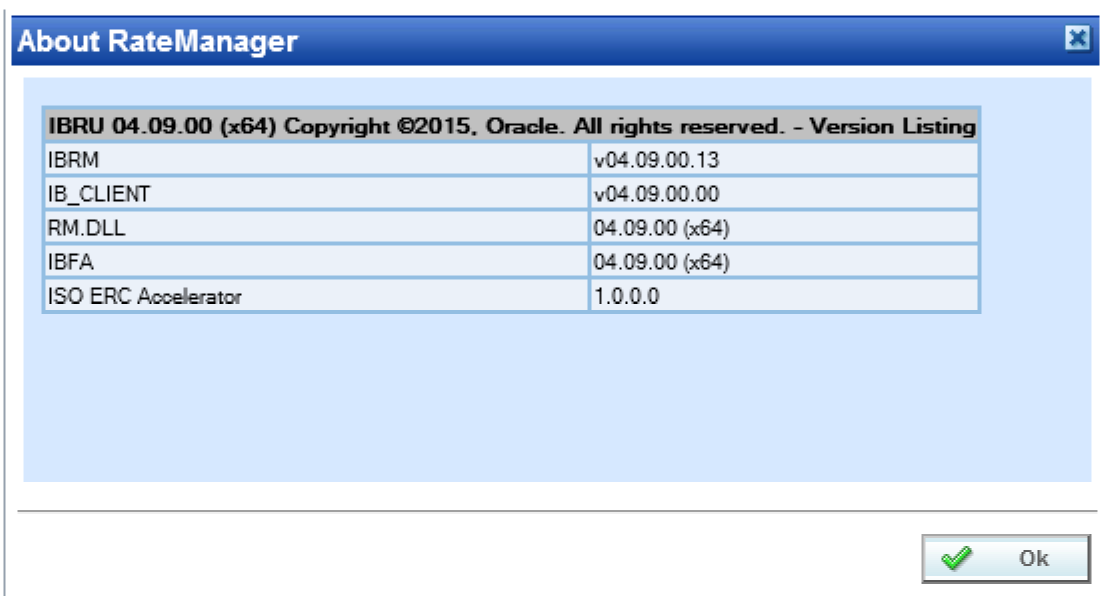


Figure 89 Version Listing

3. The latest version information including RateManager release number, IB Client schemas and build will be displayed.

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 mapped 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 mapped variable if no match is found based on the criteria.
Dependency:	When copying a variable, algorithm or driver assignment, any element that requires another element to be present or defined will be listed. All dependencies must be resolved.
Driver Assignment:	Driver assignment is an auto insurance specific method of assigning a particular driver to a particular vehicle on a policy, based on certain criteria. Criteria often differ on a carrier basis, and sometimes even on a program level.

Driver Assignment Scenario:	A driver assignment scenario is a list of instructions that define the main sequence of operations to properly define the driver assignment logic for a carrier. A scenario is based upon the same algorithm principle used throughout the RateManager software.
E	
Export:	Exports allow users to export all elements of a program from one database to another database or within the same database. Or to export data in tab-delimited form, from a RateManager table to an outside location.
F	
Flag:	A variable that holds a 1 for true and a 0 for false.
Flag Driver Algorithm:	An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.
Flag Driver Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Driver Algorithm.
Flag Vehicle Algorithm:	An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.
Flag Vehicle Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Vehicle Algorithm.
G	
Global:	An input or variable that is available to all programs under a specific subline.
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 Insbridge 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 mapped variables that have been associated with one another because they use the same criteria.
Lock:	A lock will close all associated Variables, Algorithms, Driver Assignments, Sequencing and Result Mappings in a program version from deletions and edits.
Logical Environment	An environment created for a subscriber in IBFA. It defines package location, engine location and database location in addition to several other supporting data items. This environment is used for rating and/or SRP management. Each database connection will have a logical environment.
M	
Mask:	A feature that allows the customer to determine how data should be interpreted.
MultiLines:	A MultiLines 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: • Determine premiums • Calculate differences in limits being passed into the system vs. limits being rated by the system • Assign tiers
O	
Operator:	A built-in mathematical function used in calculations and comparisons.
P	
Package:	A small file that holds all the RateManager logic for a specific program and version.
Package Location:	A pointer to a location where SoftRater Packages (SRP's) are stored.
Physical Environment:	A physical environment is generally referred to as a physical machine.
Program:	A planned group of procedures executed in a specific order to return a rating. Programs in RateManager typically correspond to rate manuals. Programs can be either created by the users or imported.
Program Date Mask:	Specifies how SoftRater interprets dates being passed into an input file.
Program Folders:	A RateManager file management system that functions in much the same way as Microsoft Windows Explorer. This multi-level setup allows for an unlimited number of program folders and subfolders to be placed underneath a subline.

R	
Rank Driver Algorithm:	An algorithm used by a Rank Driver Function to rate drivers based on certain criteria.
Rank Driver Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rank Driver Algorithm.
Rank Vehicle Algorithm:	An algorithm used by a Rank Vehicle Function to rate vehicles based on certain criteria.
Rank Vehicle Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rate Vehicle Algorithm.
Rating Environment	The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
Reconcile	A comparison feature that compares one program version against another version in the same program and generate a report of the differences.
Restrictions:	Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator.
Result:	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 Insbridge 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. See Variables in the Contents section for more information.
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 mapped 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.

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