ORACLE
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Oracle Insurance

Insbridge Enterprise Rating

Framework Administrator User Guide

Release 5.1

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Oracle Insurance Insbridge Rating Enterprise Framework Administrator User Guide

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PREFACE

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

IBFA may also be referred to as SoftRater for Windows.

AUDIENCE

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

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Enterprise Rating RateManager User Guide.
- The Oracle Insurance Insbridge Enterprise Rating SoftRater User Guide.
- You can view these guides in-line at this address:

  http://www.oracle.com/technetwork/documentation/insurance-097481.html

CONVENTIONS

The following text conventions are used in this document:

Convention	Description
bold	Boldface type indicates graphical user interface elements associated with an action.
Italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`Monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the window, or text that you enter.

SYSTEM REQUIREMENTS

For minimum operating system and hardware requirements, please see the Hardware Software requirements guide.

Guide History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-753-01	V 3.5	November 2005	
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5th Edition	P01-753-05	V 3.8.3	October 2007	Update Version
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15th Edition	P01-753-15	R 4.0.1	August 2010	Update Release
16th Edition	P01-753-16	R 4.1	December 2010	Update Release
17th Edition	P01-753-17	R 4.5	May 2011	Update Release
18th Edition	P01-753-18	R 4.5.1	September 2011	Update Release
19th Edition	P01-753-19	R 4.6	May 2012	Update Release
20th Edition	P01-753-20	R 4.6.1	November 2012	Update Release
21st Edition	P01-753-21	R 4.7	September 2013	Update Release
22nd Edition	P01-753-22	R 4.7.1	November 2013	Update Release
23rd Edition	P01-753-23	R 4.8	August 2014	Update Release
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25th Edition	P01-753-25	R 5.0	August 2015	Update Release
26th Edition	P01-753-26	R 5.1	December 2015	Update Release

INSBRIDGE FRAMEWORK ADMINISTRATOR

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

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

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

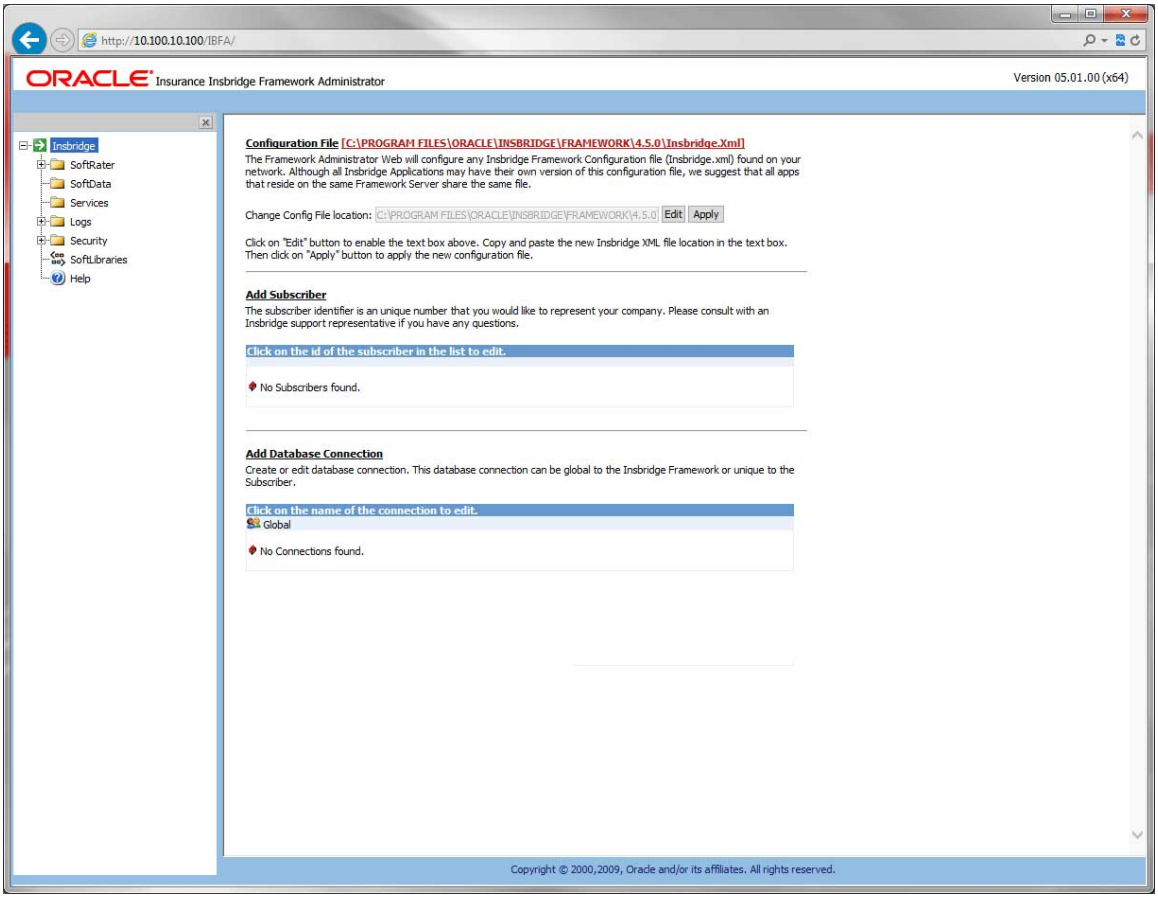


Figure 1 Insbridge Framework Administrator Main Window

Chapter 2

INTRODUCTION TO THE INSBRIDGE PAGE

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

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

Navigating to the Insbridge Page

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

2. This opens the Insbridge page.

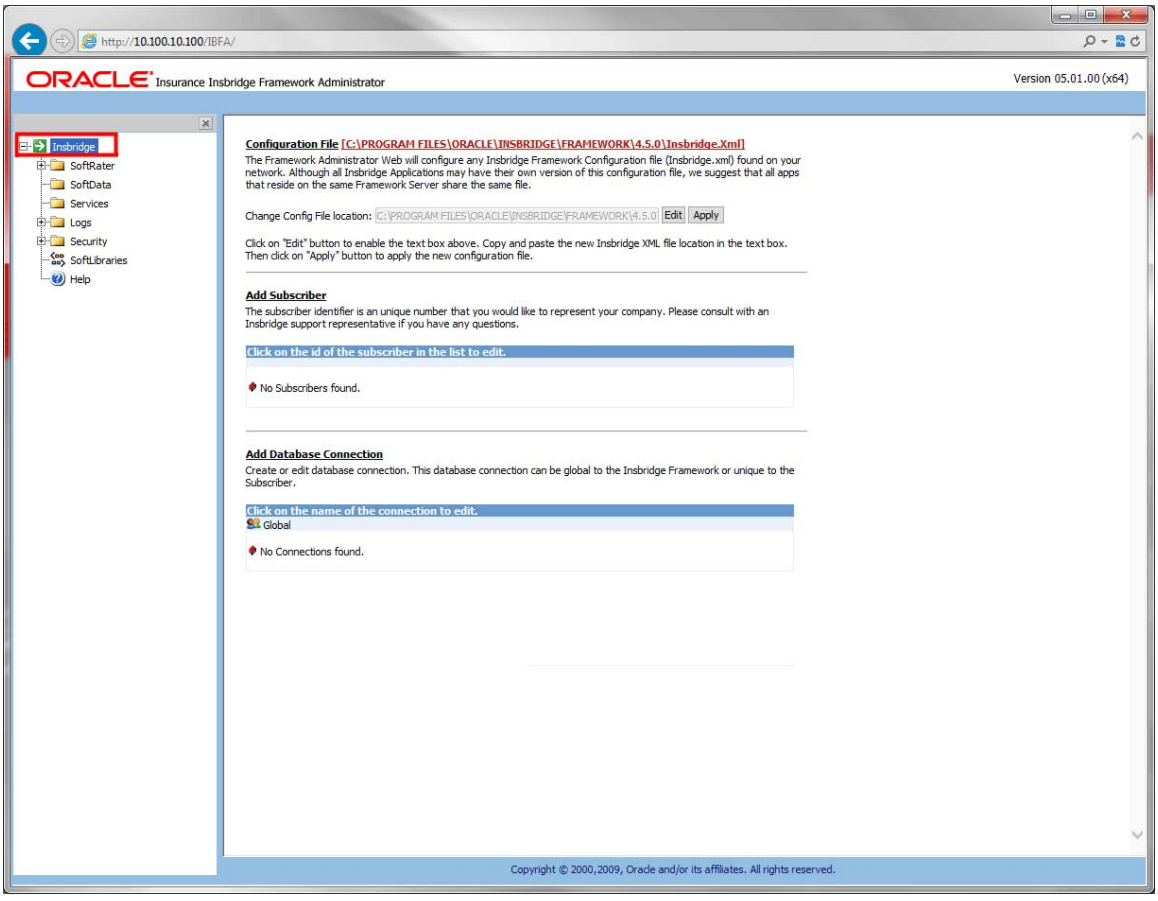


Figure 2 Insbridge Page

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

SUBSCRIBERS

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

ADDING A SUBSCRIBER

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

The Subscriber ID can be a 1 - 5 digit number and must unique for each subscriber per instance of IBFA. For example, if you have an instance of IBFA on server A, you can create a subscriber with an ID of 100. On server A, if you create another subscriber, you must give that subscriber a different ID number, say 200. If you also have an instance of IBFA on a different server, B for example, you should duplicate the same subscribers with the same ID numbers on server B.

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

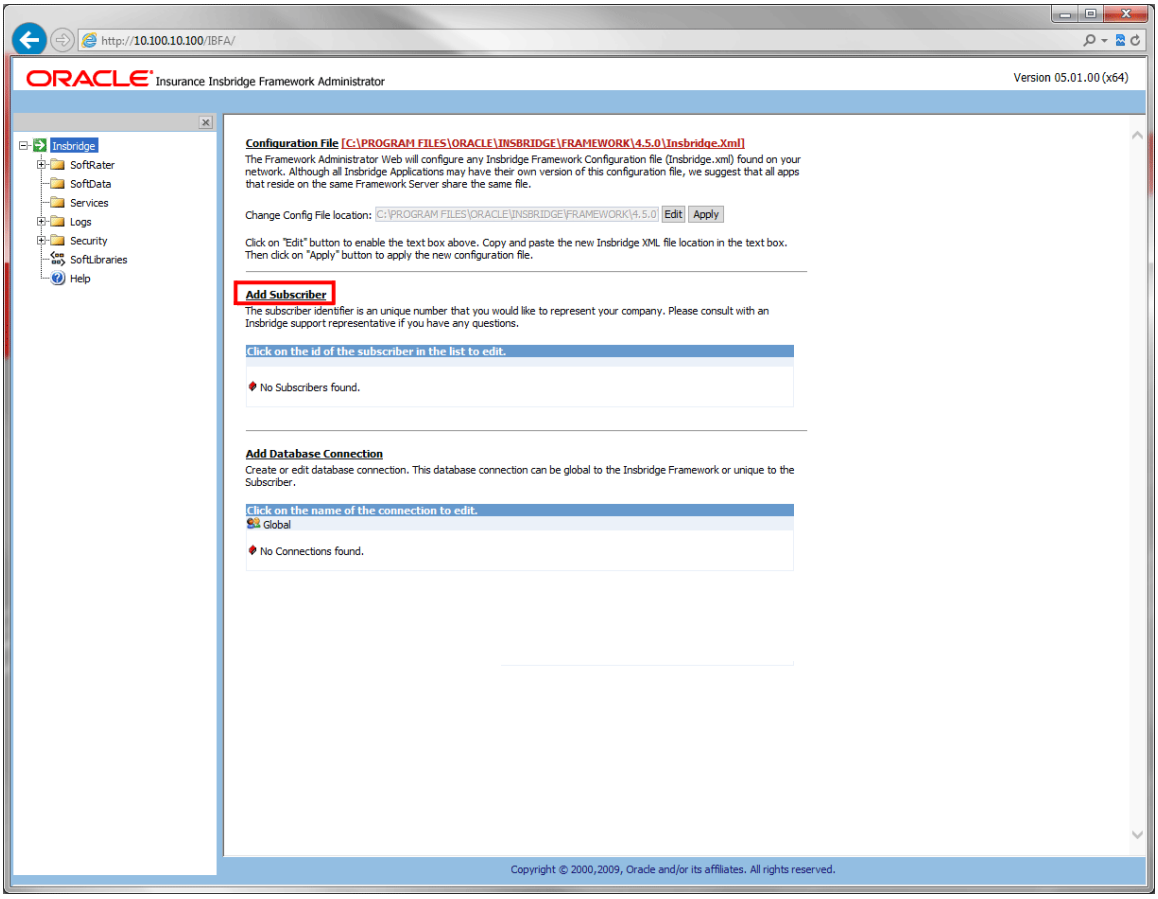


Figure 3 Adding Subscriber Links

2. This opens the **Add Subscriber** window.

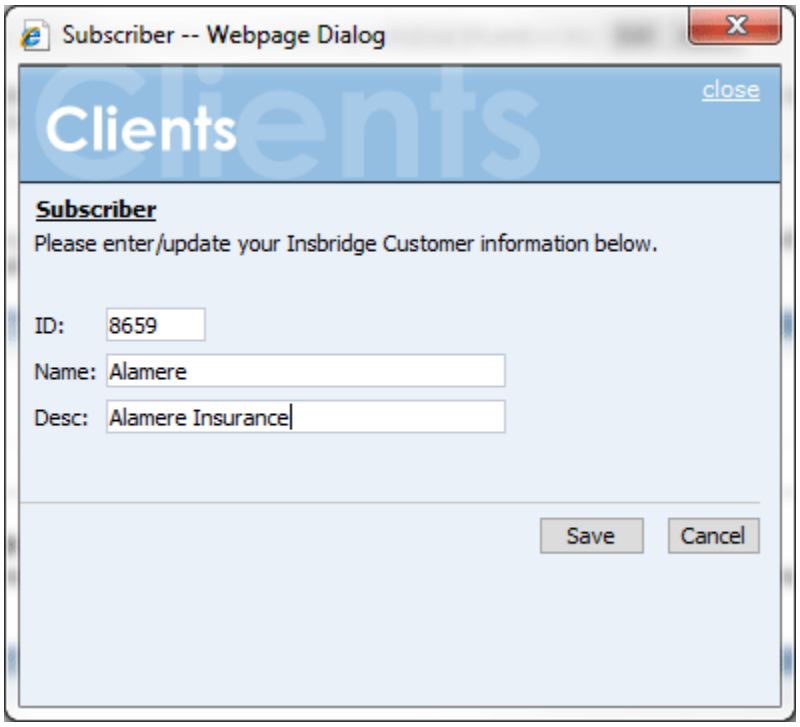


Figure 4 Adding a New Subscriber

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

4. The new subscriber is now in the list of subscribers.

NOTE: *Subscriber IDs cannot begin with a zero (0). Subscriber names can be up to 30 alpha-numeric characters. Descriptions auto fill with the subscriber name if no entry is made.*

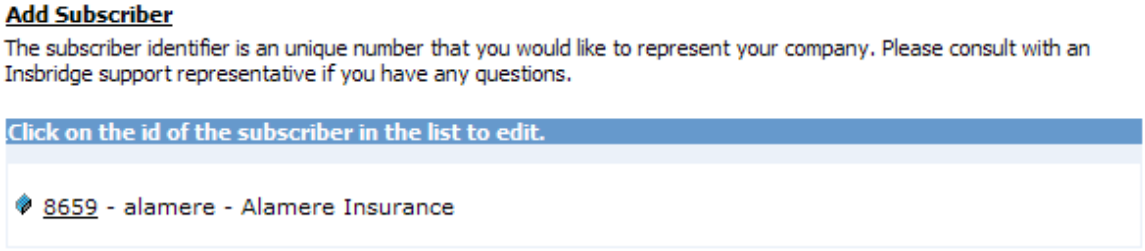


Figure 5 Subscriber List

Additional Subscribers

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

Subscribers and Libraries

Creating multiple subscribers allows for different groups within the company to have their own subscriber IDs. Subscriber designation determines where templates can be applied in RateManager. Templates created by a user in the logged in subscriber can create and apply templates that share the same subscriber ID across RateManager and Other domain types. Templates created in outside instances can be applied to Other domain types only, keeping data and program structure unique.

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

Editing a Subscriber

The only edit allowed to a subscriber is the description.

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

Deleting a Subscriber

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

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

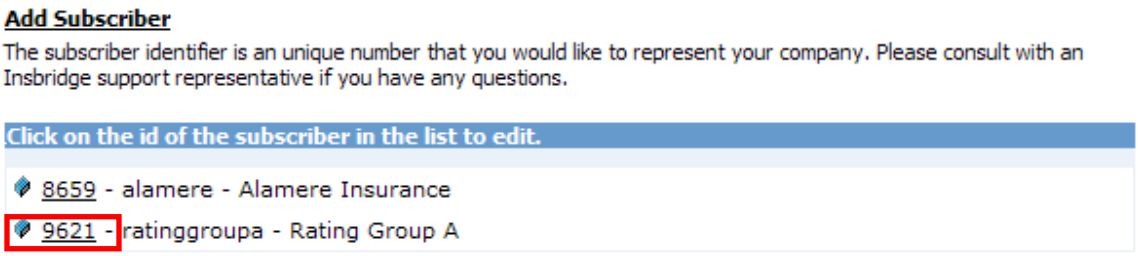


Figure 6 Subscriber List

2. This opens the **Edit Subscriber** window.

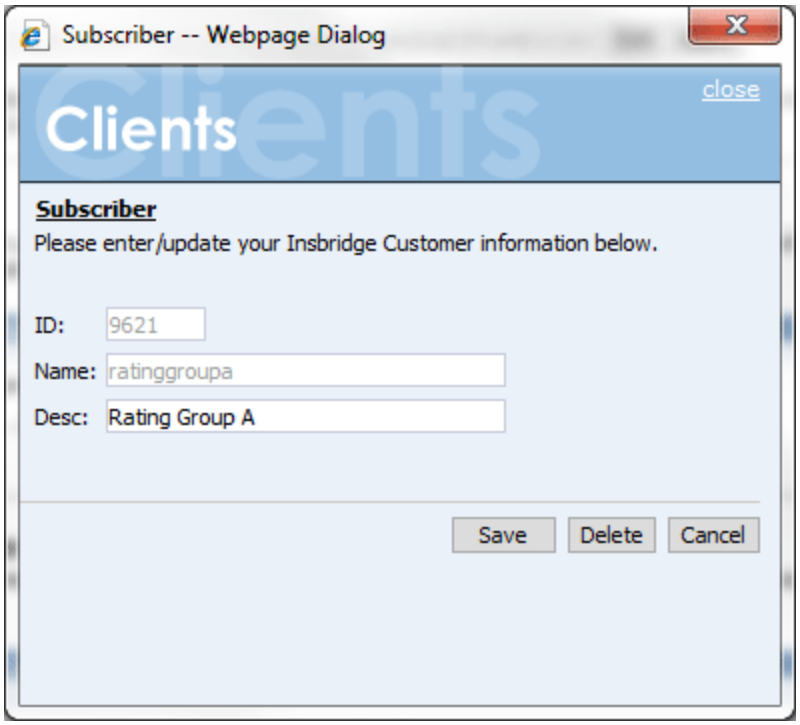


Figure 7 Deleting a Subscriber

3. Click the **Delete** button. A warning message is displayed.

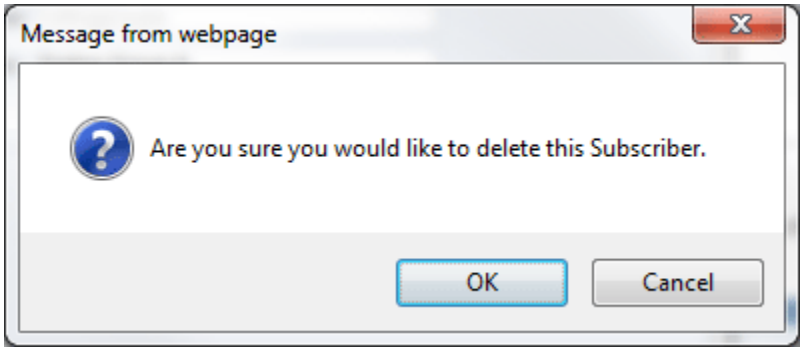


Figure 8 Confirm Deleted Subscriber

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

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

DATABASE CONNECTION

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

The three databases that must be added are:

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

The setups are similar for all three databases.

Adding a Database Connection

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

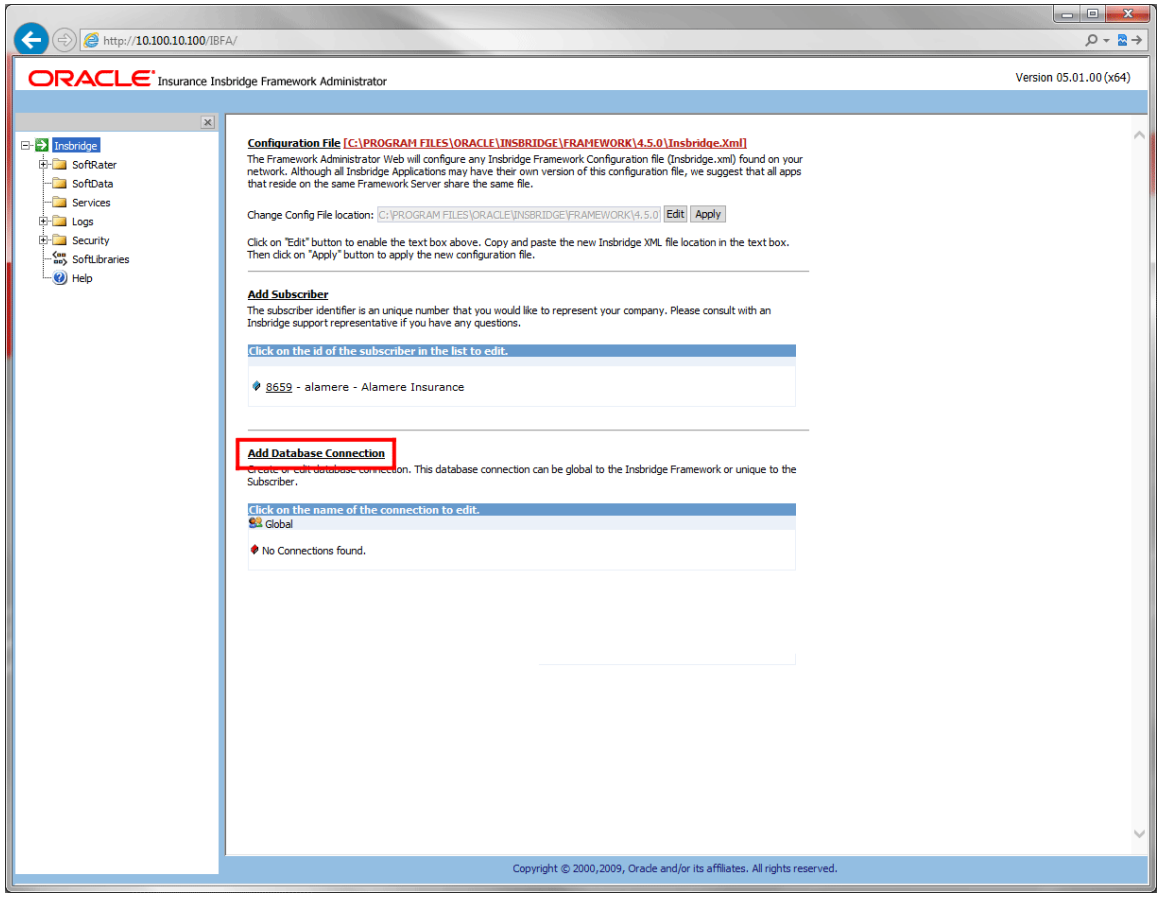


Figure 9 Adding Database Link

2. This opens the **Database Connection** window.

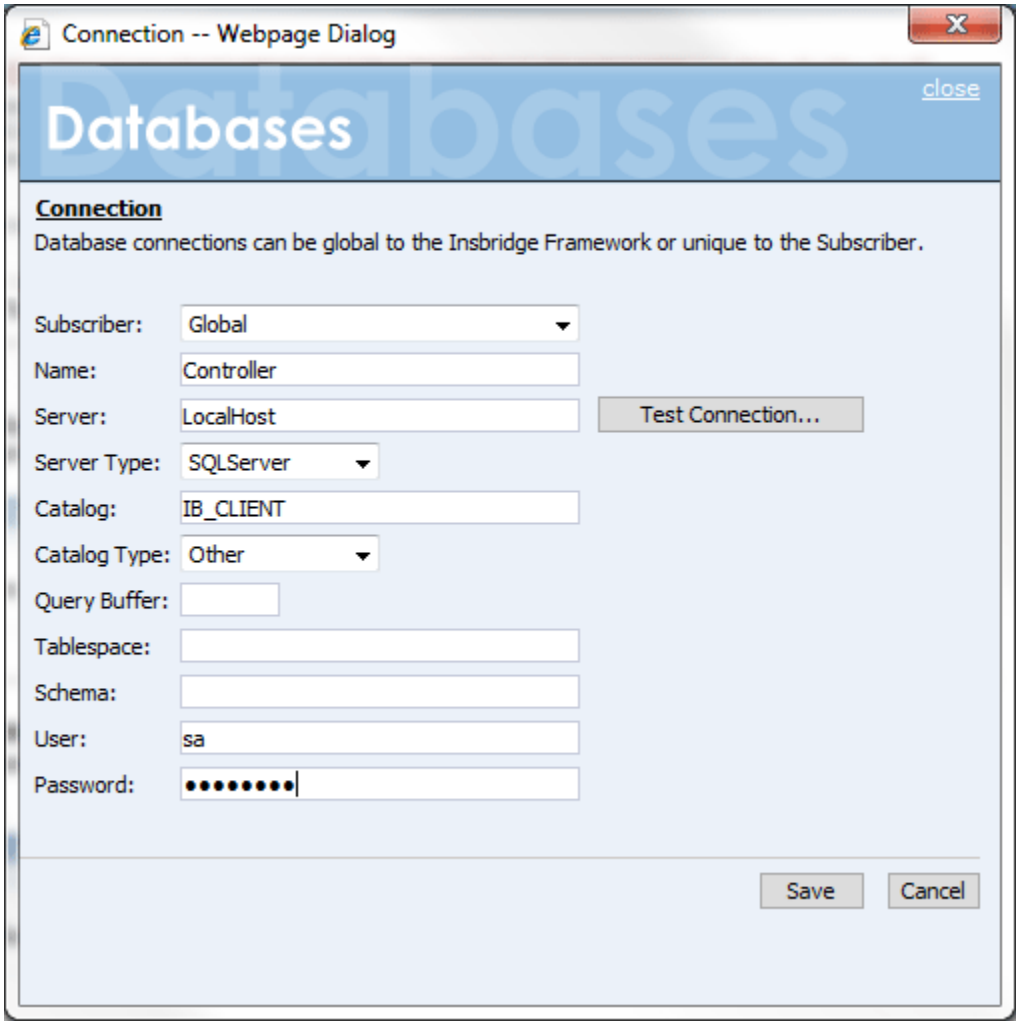


Figure 10 Adding a New Database

NOTE: *You should have the database server name or IP address, the name of the catalog in the database, login and password before you begin.*

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

   For the three databases that must be added to IBFA:

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

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

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

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

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

Editing a Database

You can make edits to most fields. The Subscriber and Name fields cannot be changed. To edit a database, click on the hyperlinked Database Name. This opens the Edit Database window. Make any changes and click Save to save your changes and return to the previous window.

Please contact Insbridge Support for any other changes.

Deleting a Database

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

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

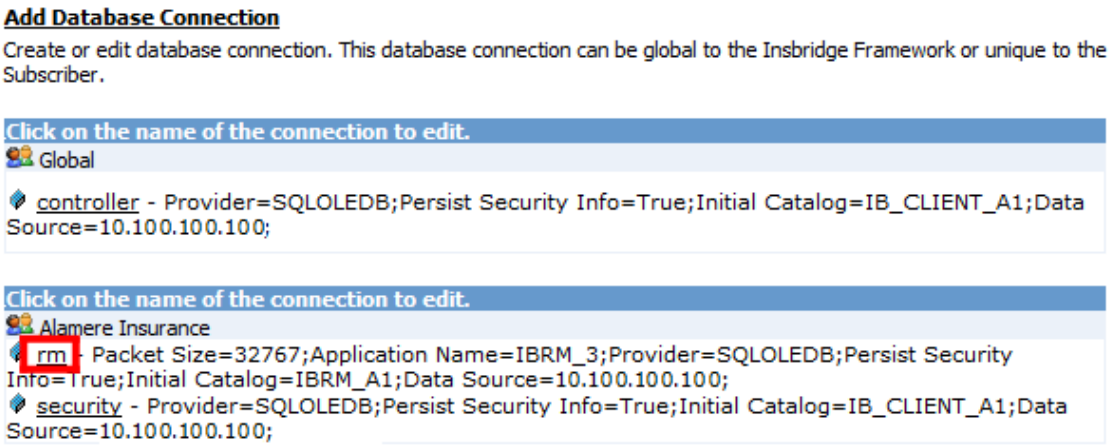


Figure 11 Database List

2. This opens the **Edit Database** window.

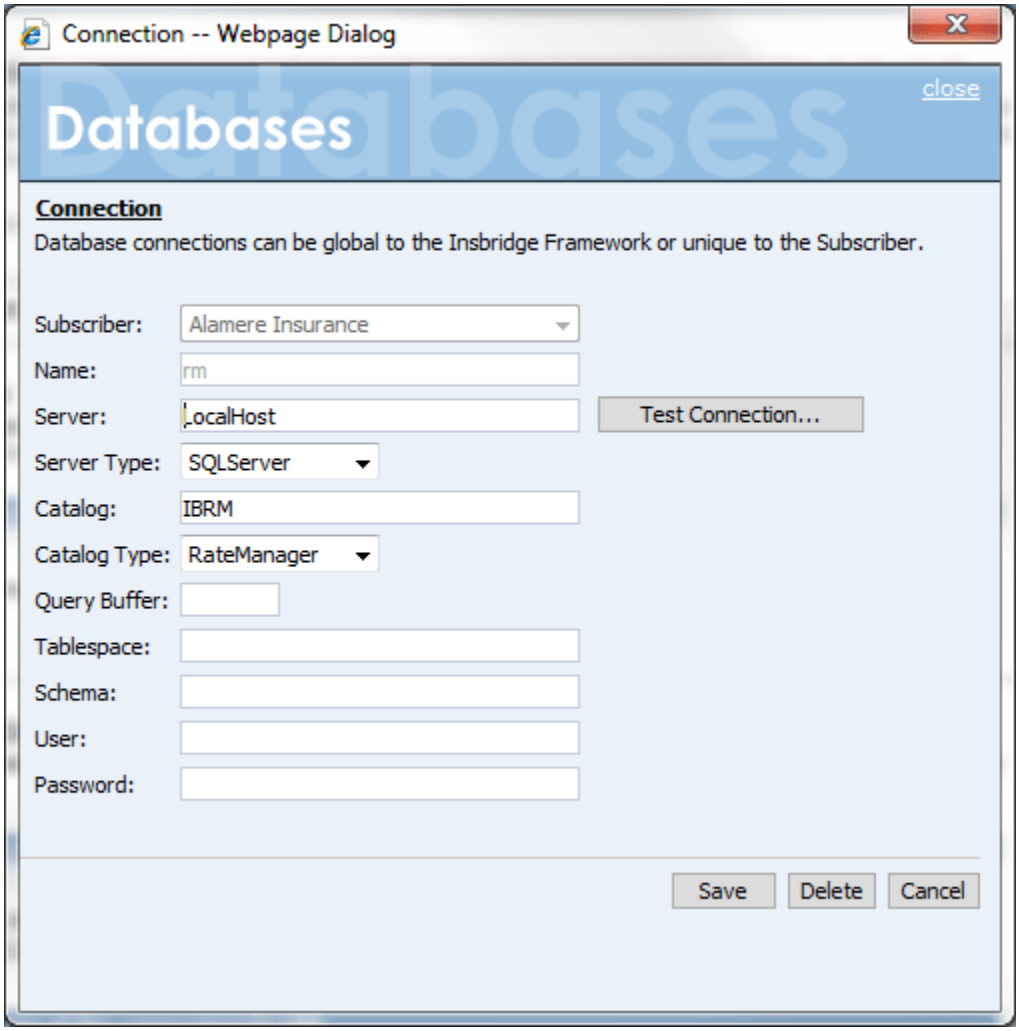


Figure 12 Edit Database Window

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

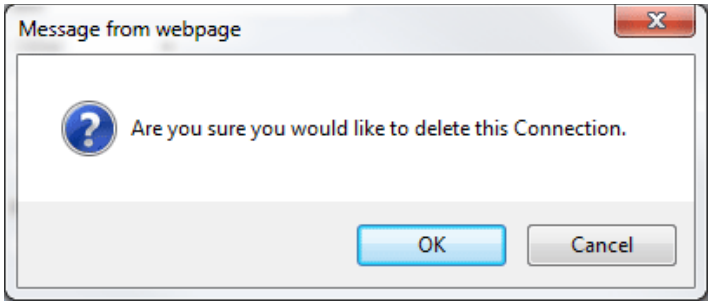


Figure 13 Confirm Deleting Database

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

WARNING: This action cannot be undone.

CONFIGURATION FILE

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

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

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

Viewing the Configuration File

Complete file information is not available until you have configured all environments.

1. On the Insbridge page, click the underlined configuration file path at the top; i.e. **C:\PROGRAM FILES\ORACLE\INSBRIDGE\FRAMEWORK\4.5.0\Insbridge.Xml.**

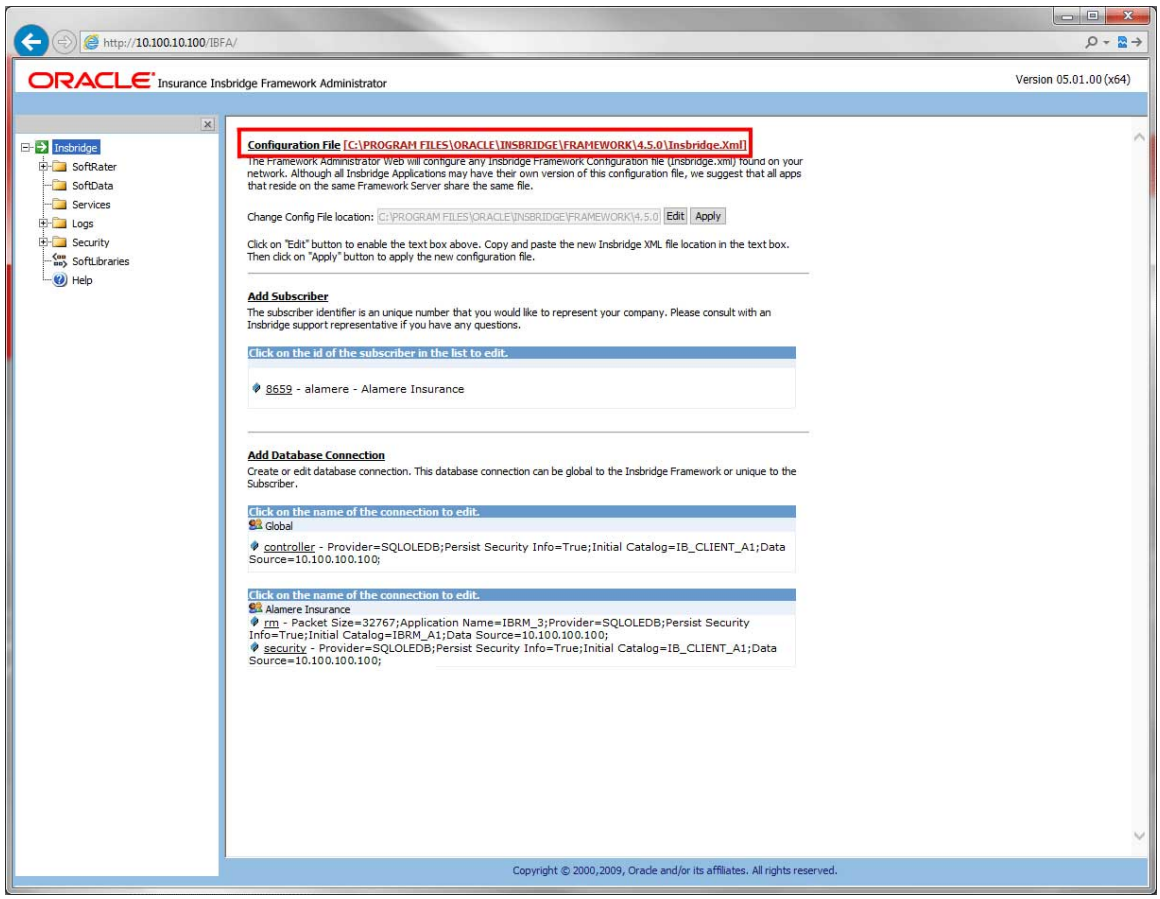


Figure 14 Insbridge Page Configuration File Path

2. The configuration file opens in a new window.

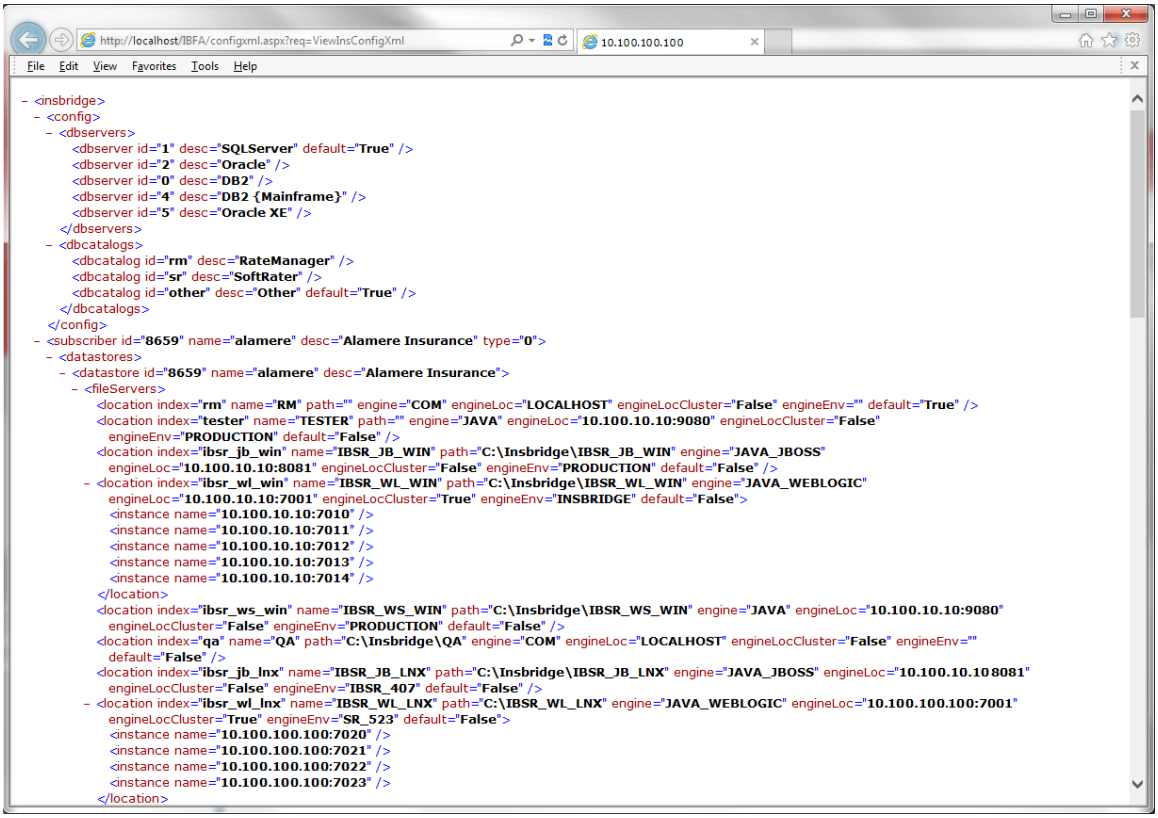


Figure 15 Configuration File New Window

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

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

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

C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\FRAMEWORK\3.5.0\Insbridge.Xml

Updating the Configuration File

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

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

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

2. From the Insbridge page, click **Edit** to enable the Change Config File location field to allow for entries. If the field is grayed out, no changes can be made.

3. Enter the new location of the configuration file in the text box next to **Change Config File location** (be sure to include the file name).

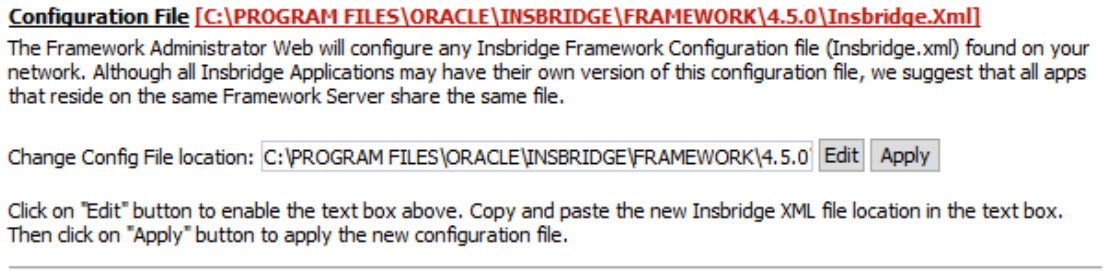


Figure 16 Changing Location of Configuration File

4. When you are finished, click **Apply**.

5. The Insbridge page refreshes and the path to the new configuration file is shown. All Insbridge applications will now use the new configuration file.

Custom Location for Insbridge.XML

The Insbirdge.XML file can be placed in a custom location. If you plan on using a custom location for the **Insbridge.Xml** then please update Insbridge as follows:

1. Copy **Insbridge.Xml** file from default location to custom location;
    a. Default: [DRIVE]:\[INSTALL PATH]\Oracle\Insbridge\Framework\4.5.0

2. Update the Insbridge applications to reflect the new location of the Insbridge.Xml file:

    a. **RateManager:** Go to Tools→Preferences. In Preferences window select Web Setting. Change the *Insbridge ConfigXml Path* to the new path and Save.
    b. **IBFA:** On the top of the default page (Insbridge) change the *Config File location* to the new path and Save.
    c. **Insbridge Portal:** Go to [DRIVE]:\[INSTALL PATH]\Oracle\Insbridge\Webs\insbridge\bin
    Open file labeled **Insbridge.Net.Fwk.dll.config** and modify the value attribute for the *INSBRIDGEXML* key
    d. **Framework Applications:** Go to [DRIVE]:\[INSTALL PATH]\Oracle\Insbridge\Framework\4.5.0
    Open file labeled **Insbridge.Net.Fwk.dll.config** and modify the value attribute for the *INSBRIDGEXML* key

3. Restart IIS.

Custom locations may require manual updates if certain system properties, such as database user names and passwords, are updated.

Chapter 3

SOFTRATER

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

The SoftRater page has four areas:

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

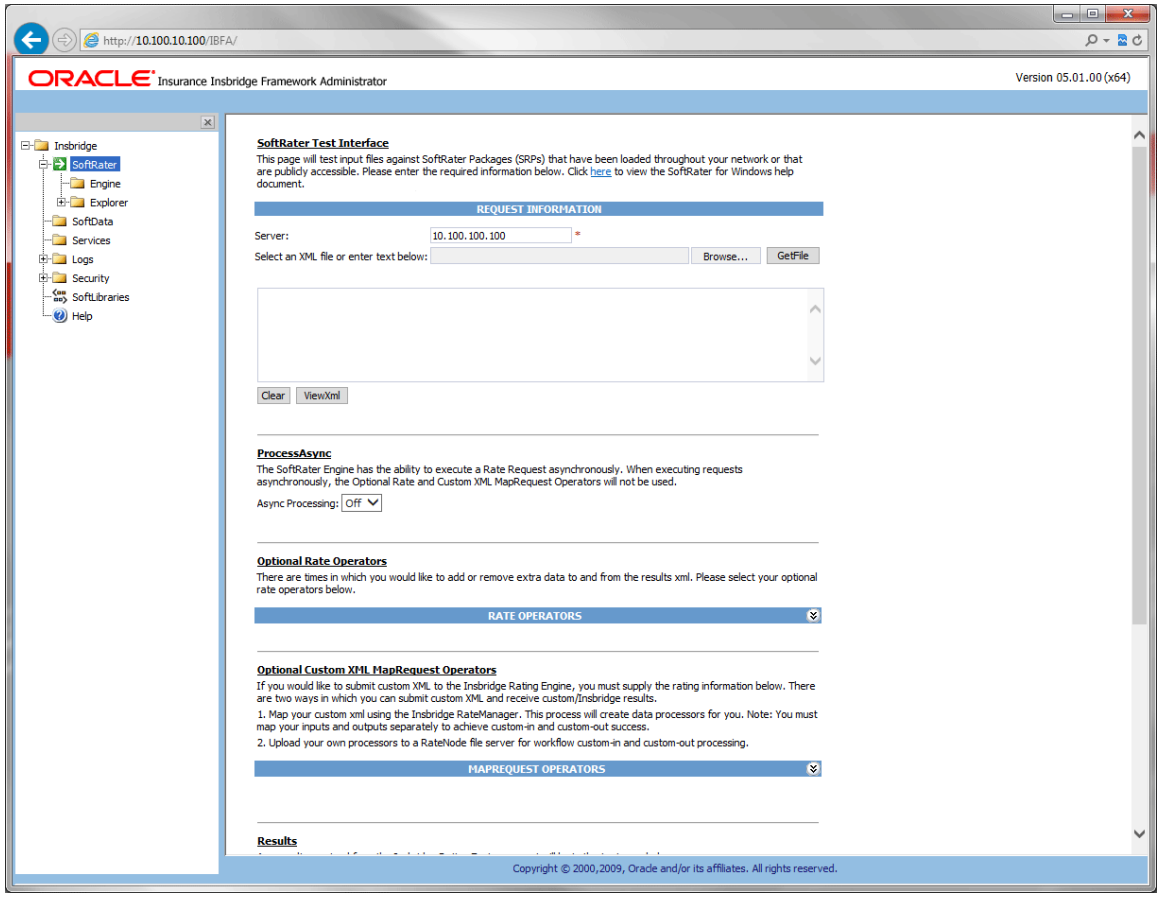


Figure 17 SoftRater Page

Navigating to the SoftRater Page

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

2. This opens the **SoftRater** page.

SOFTRATER TEST INTERFACE

Use the SoftRater Test Interface when you want to:

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

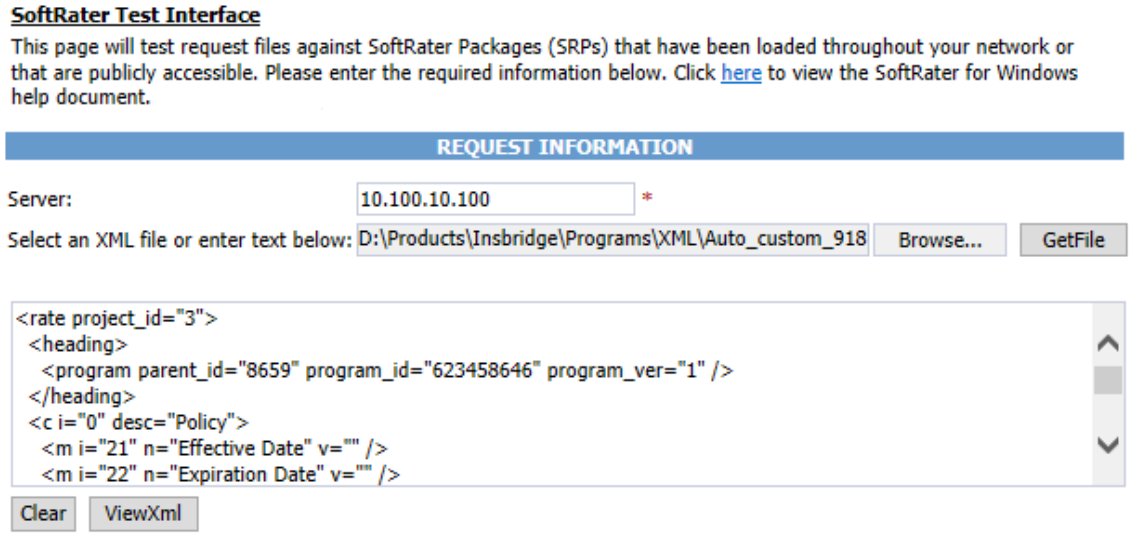


Figure 18 SoftRater Test Interface

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

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

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

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

5. The file is rated and the results are shown in the results box.

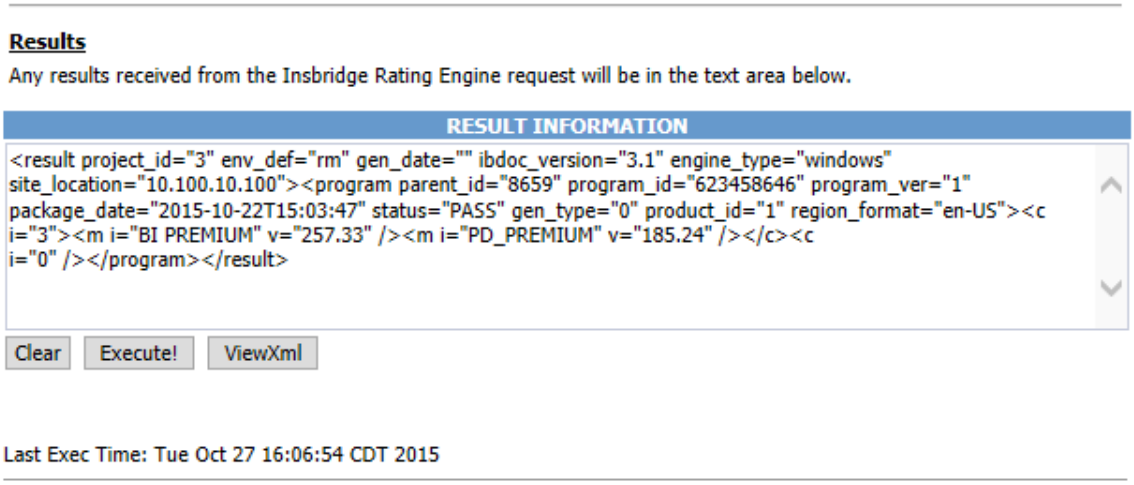


Figure 19 Test Results

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

Process Async

The SoftRater test interface can be set to run asynchronously. Select ON to perform the action in the background and, optionally, notifies the email address entered on the Explorer page when the action is complete. Optional operators cannot be used with this option. Select OFF and the action is performed immediately while you wait. The default is OFF.

Rating a File Using the SoftRater Test Interface

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

- Rate Operators
- Map Request Operators

Rate Operators

Rate operators are optional and function to add or remove information from the result XML. They also enable you to override the default result and environment definitions. To view or edit optional

rate operators, click the expand icon on the far right hand side of the RATE OPERATORS header.

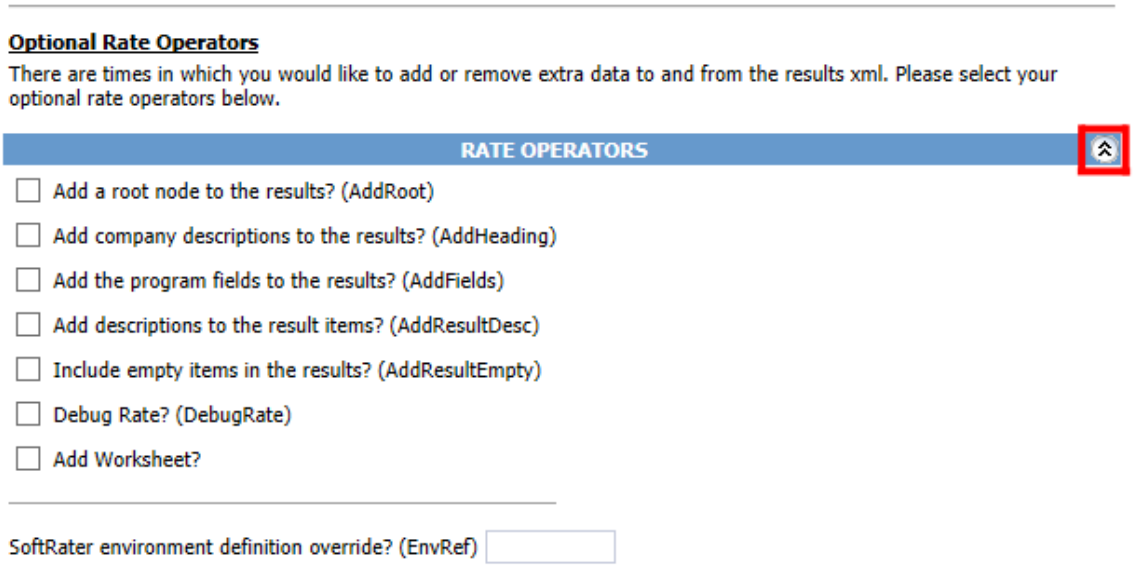


Figure 20 Optional Rate Operators

NOTE: *You can use any combination of rate operators. If both Debug and Worksheet are selected, only worksheet values are returned.*

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

Add a root node to the results? (AddRoot): Add the root node when you want to determine how long SoftRater is taking to rate a policy. The root node contains the time rating started and the time rating stopped. It also shows you the number of input files and the number of output files. The root node is always the first line in the results and begins with `<ibdoc>.`

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

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

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

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

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

Debug Rate? (DebugRate): Check this box if you would like to see the debugged XML along with the results. Debug results are not returned if Worksheet is also selected.

Add Worksheet?: Check this box if you would like to see any associated worksheets along with the results. Checking this box does not add a worksheet if one does not exist. If both Debug and Worksheet are selected, only Worksheet values are returned.

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

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

Map Request Operators

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

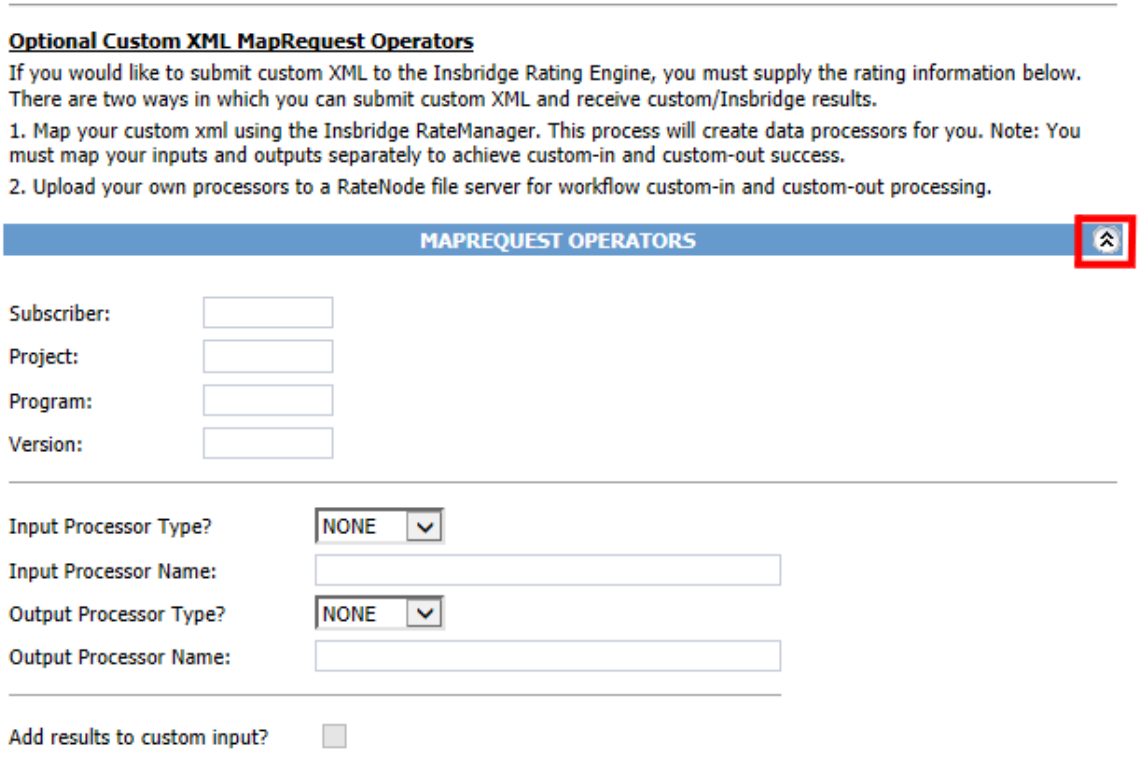


Figure 21 Custom XML Map Request Operators

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

Subscriber: Your subscriber ID.

Project: The number for the project you are rating.

Program: The program ID you are rating.

Version: The program version you are rating.

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

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

GLOBAL: A mapping that can be used by all programs under a specific project. Global mappings are created in RateManager from the **Custom XML Mapping** window on the right click menu of the project.

LOCAL: A mapping that is specific to a particular program version. Local mappings are created in RateManager from the **Program Listing** window on the right click menu of the program version.

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

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

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

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

LOCAL: A mapping that is specific to a particular program version. Local mappings are created in RateManager from the **Program Listing** window on the right click menu of the program version.

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

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

You can optionally check the following:

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

SOFTRATER ENGINE

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

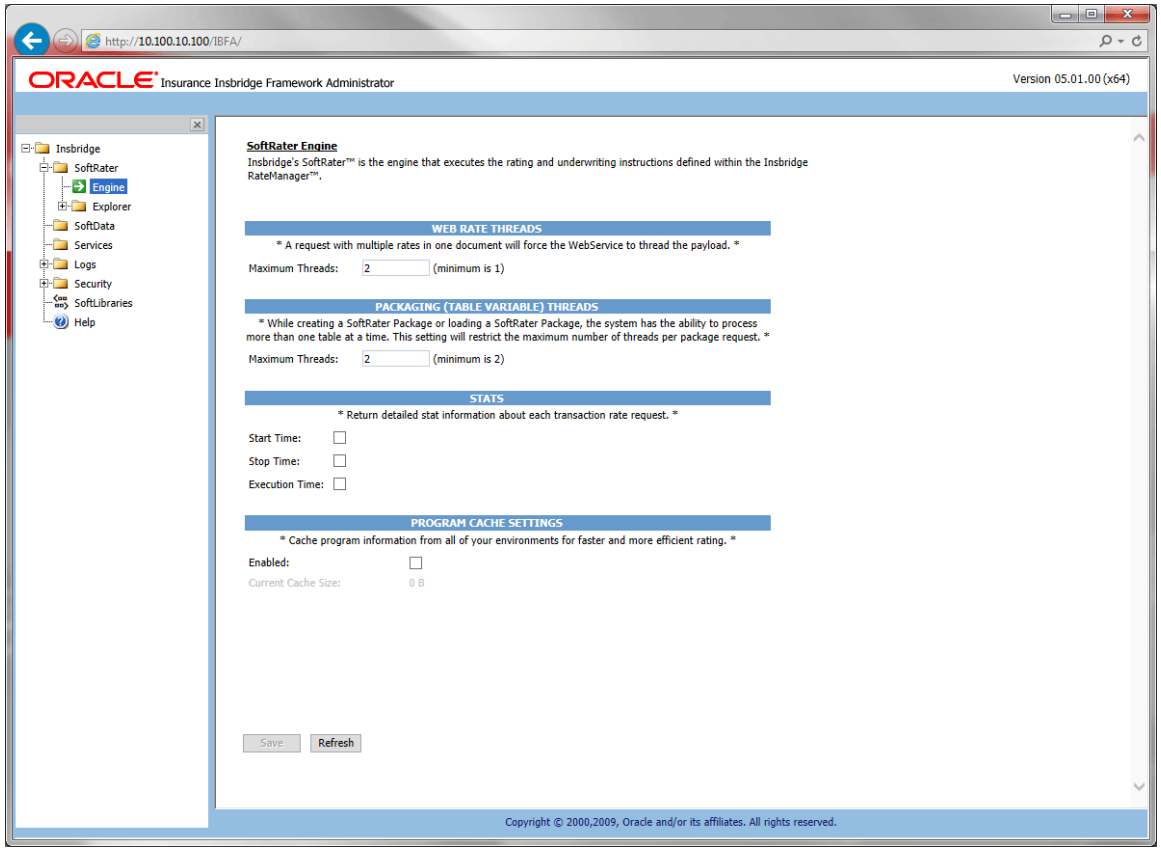


Figure 22 SoftRater Engine Configuration Page

Navigating to the SoftRater Engine

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

2. This opens the **SoftRater Engine** configuration page.

Web Rate Threads

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

For more on threading, please see Threading.

Packaging (Table Variable) Threads

The IBFA system administrator can set the maximum number of threads to be used when loading tables from a SoftRater package. This allows the system to process more than one table at a time. It is recommended that the setting be no higher than two threads per core.

Stats

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

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

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

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

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

Program Cache Settings

The Program Cache Settings allows you to configure the cache. After making a change, click **Save** to save your entries. If you want to reset the options to the last saved version, click **Refresh**.

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

Current Cache Size: This is an information only field. Displays the current cache size. If Program Cache is not enabled, this option is grayed out.

Cached Program Listing

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

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

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

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

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

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

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

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

Chapter 5

SOFTRATER EXPLORER

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

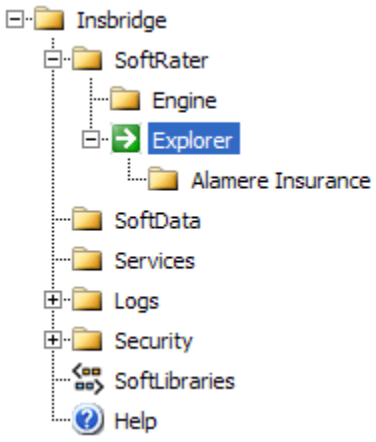
- **Explorer Configuration Page:** This page contains universal settings that apply to all subscribers.
- **Subscriber Page:** Each individual subscriber has a SoftRater Explorer page that has two tabs.
  - **Settings:** This is where you setup and configure environments, LOB's, and virtual file servers. You must complete this information prior to working on the Content tab.
  - **Content:** Once configured, SoftRater Explorer is where you will download, load, unload, move and delete packages to/from your SoftRater environments. This tab also is where you create backups for remote SoftRater environments.

Explorer Configuration Page

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

Navigating to the Explorer Configuration Page

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



2. This opens the **Explorer Configuration Tab**.

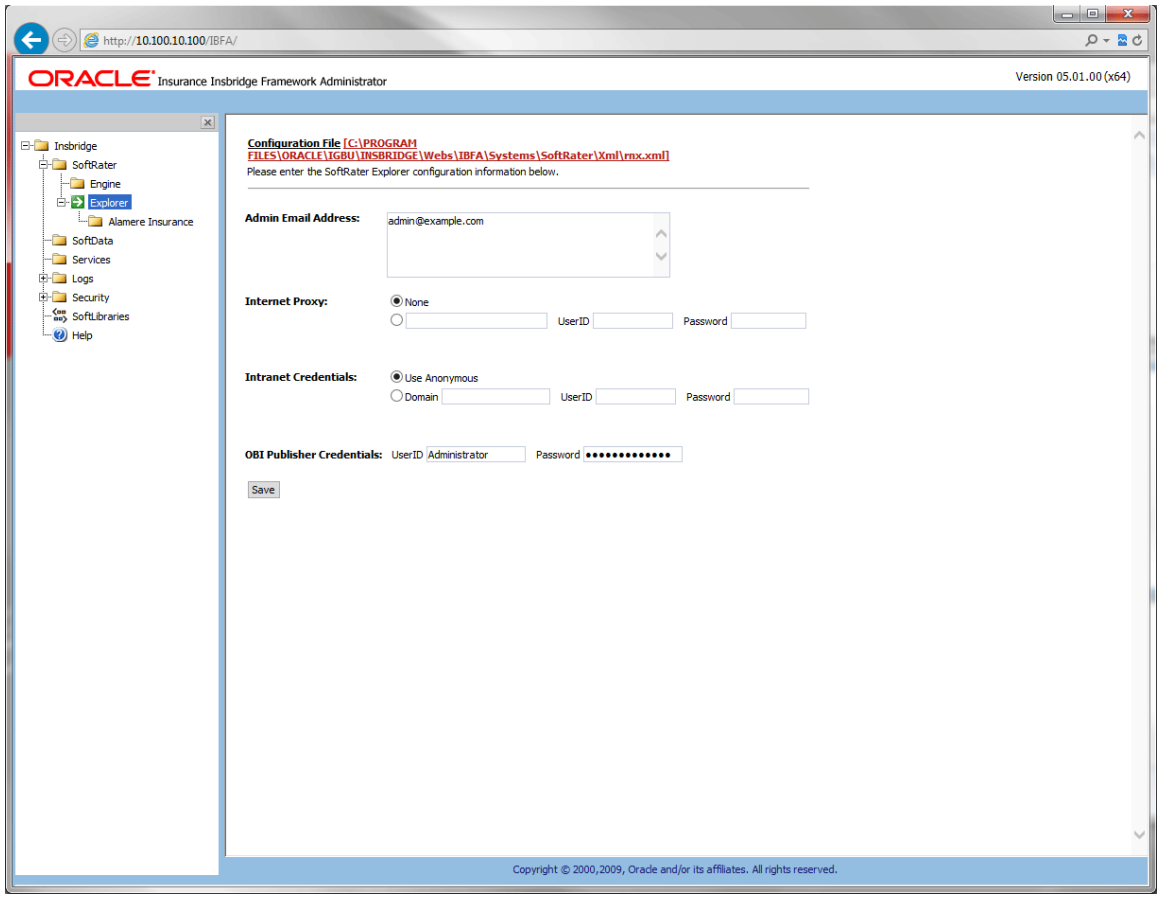


Figure 23 Explorer Configuration Page

Configuration File: This configuration file (rnx.xml) contains the information entered on the current page **(Explorer Configuration Page)**. This file is not created until you have saved an entry. If you click on the link without saving an entry, you will receive an error message. After you have saved an entry, you can view the file by clicking the underlined path to the file.

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

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

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

C:\PROGRAM FILES\ORACLE\IGBU\INSBRIDGE\FRAMEWORK\3.5.0\Insbridge.Xml

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

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

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

OBI Publisher Credentials: The credentials used by the Insbridge system to access OBI Publisher are managed here. The credentials are entered at installation and can be updated in OBI Publisher and then updated in IBFA. If credentials were not entered at installation, please contact support for assistance.

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

Editing the rnx.xml File

All information on this page is saved to an rnx.xml configuration file. The configuration file can be edited by making updates to the fields on the page and saving the changes. If any field is changed, you must save your entry prior to leaving the page. No warning is given if changes are made but not saved prior to leaving the page.

You can view the contents of the file by clicking the configuration file link at the top of the window. Information is displayed on a separate screen.

Updating the rnx.xml File

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

You also can edit the rmx.xml file directly on the server where the Insbridge system was installed.

OBI Publisher Credentials

OBI Publisher is required to generate reports. The credentials here must match the credentials in OBI Publisher. The credentials should be entered at installation and can be updated at any time.

OBI Publisher uses ports 9704 and 23791. The OBI Publisher console is located at:

http://localhost:9704/xmlpserver

where localhost is the location of the IBFA/RM installation

Updating the OBI Publisher Password

The OBI Publisher password must be updated in OBI Publisher and then in IBFA.

1. Enter the OBI Publisher console. http://localhost:9704/xmlpserver where localhost is the machine where IBFA/RM is installed.
2. Select the Admin tab.
3. Under Security Center, select Users.

4. Select the administrator Username.
5. Enter in a new password and click Apply. This updates the Administrators password.
6. Sign out of OBI Publisher.
7. Enter IBFA.
8. Open the SoftRater Explorer Configuration window. Enter the same password in the OBI Publisher Credentials.
9. Click Save. The password has been updated.

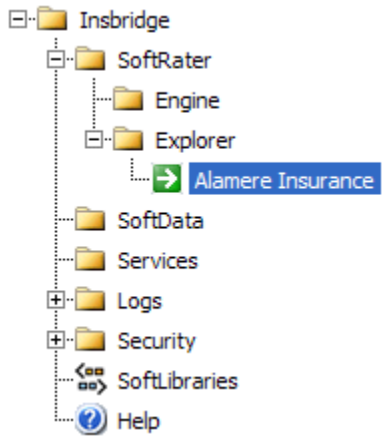
For security purposes, information regarding the user ID, and default password is not included in this help document. For information regarding these, please log a Service Request using My Oracle Support at https://support.oracle.com/.

SETTINGS TAB

Once you have added a new subscriber on the Insbridge page, then next step is to set up and configure environments, products, and virtual servers for that subscriber.

Navigating to the Setting Tab

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



2. First time users are placed on the **Settings Tab**.

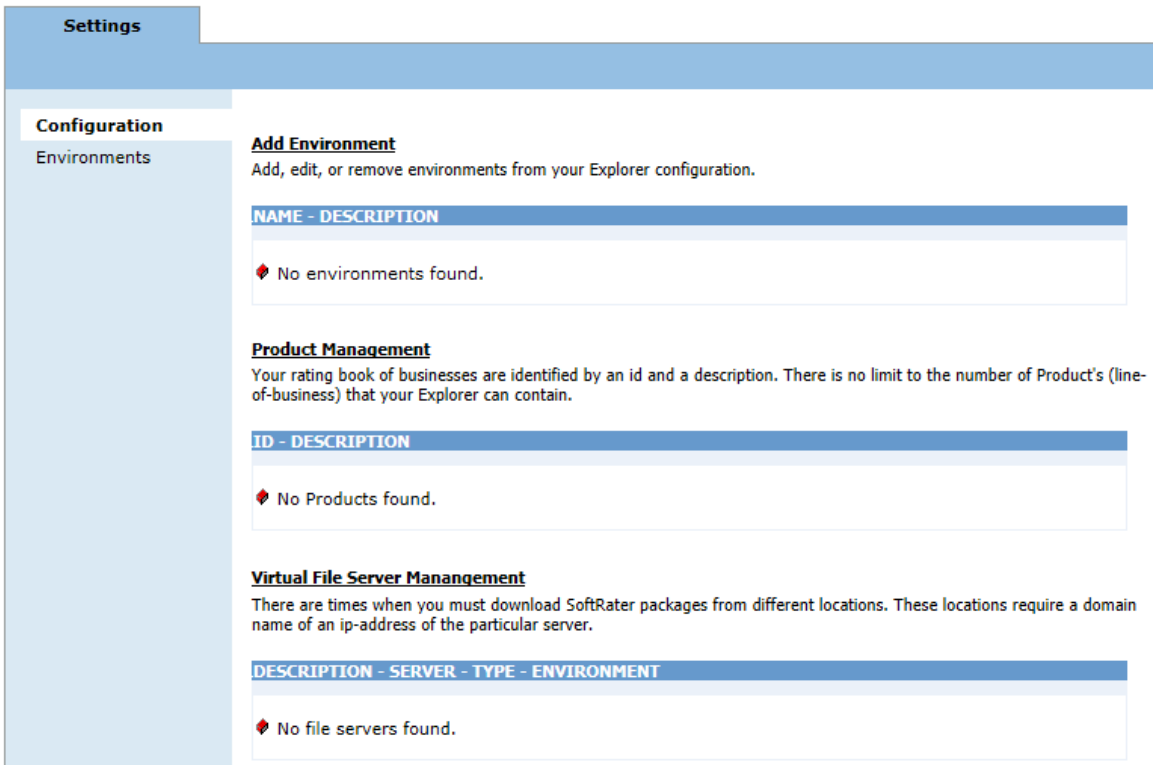


Figure 24 Subscriber Settings Tab

The Settings tab has two subtabs:

- **Configuration:** This subtab is where you can add or delete the Insbridge environments you want to use. All environments where packages will be loaded or accessed need to be created on the Configuration subtab first. Any environment that this server communicates with should be added here as well.

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

CONFIGURATION SUBTAB

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

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

- **Environments**
- **Product Management**
- **Virtual File Server Management**

Environments

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

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

Adding an Environment

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

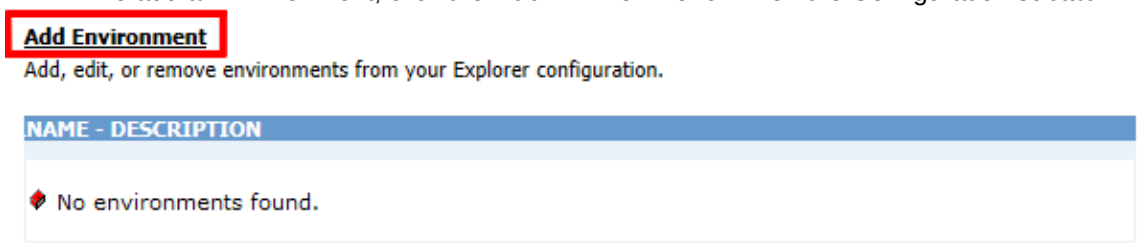


Figure 25 Environment Listing Subtab

2. This opens the **Add Environments** window.

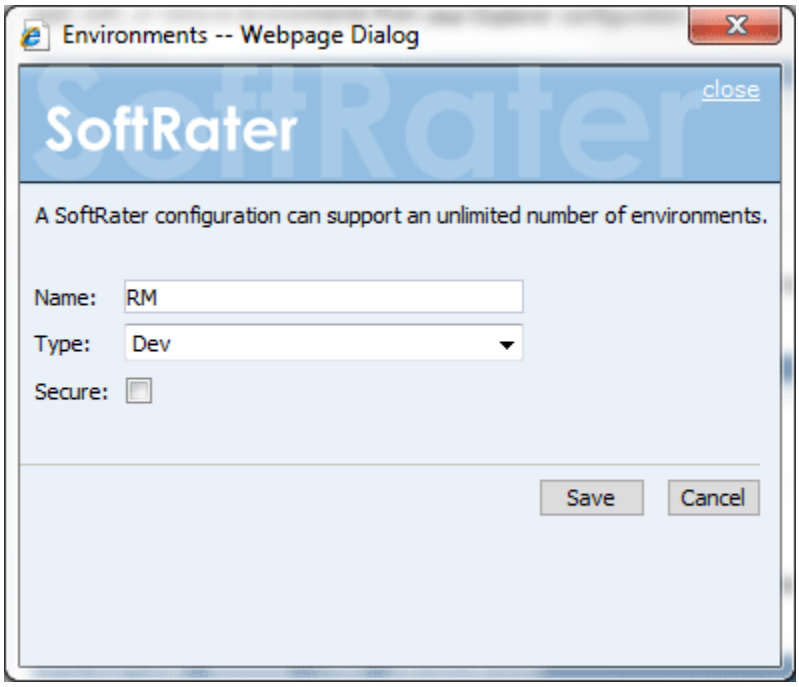


Figure 26 Adding an Environment

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

   - Development
   - Quality Assurance
   - Production

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

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

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

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

Editing an Environment

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

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

Deleting an Environment

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

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

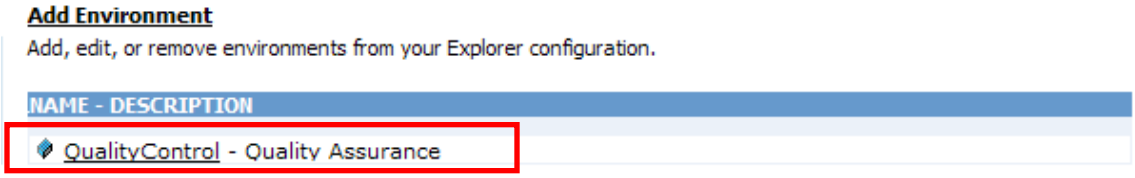


Figure 27 Environment List

2. This opens the **Edit Environments** window.

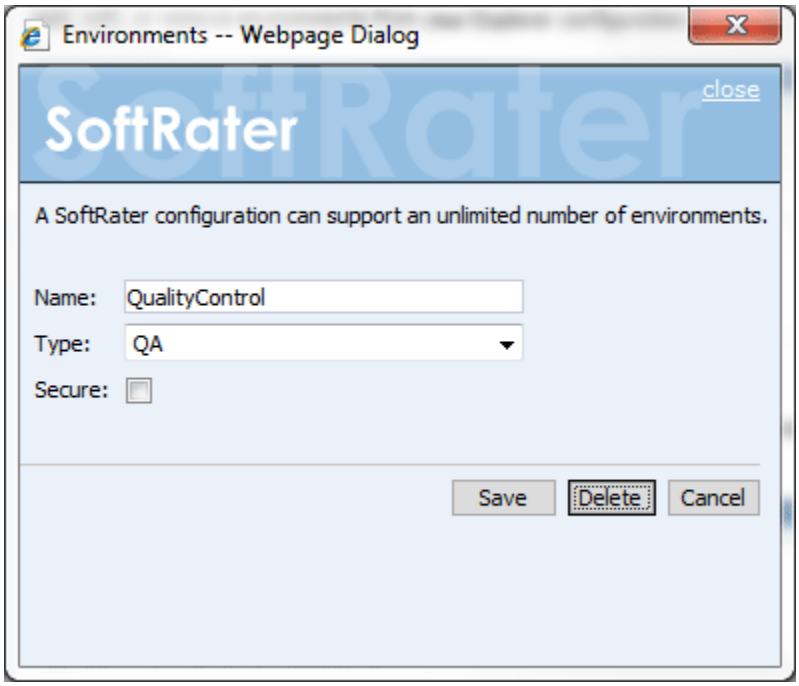


Figure 28 Edit Environment

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

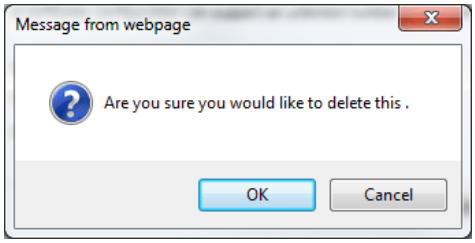


Figure 29 Confirm Delete of Environment

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

Product Management

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

Adding a Product

1. From the Configuration subtab, click the **Product Management** link.

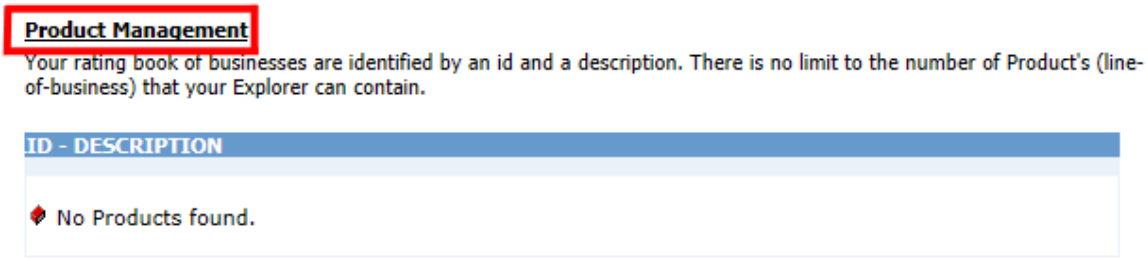


Figure 30 Product Management

2. This opens the **Products Management** window.

Figure 31 Adding a Product

3. Enter the XML ID of the product in the text box next to **ID.** The XML ID is available from

RateManager on the Manage Products window. Tools→Manage Products. The XML ID for the product is in the first column. You must have admin permissions to view Manage Products.

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

5. Click **Add**.

6. The product is added to the list. Once you have finished adding products, click **Save**.

7. The added products now appear in the search option. For additional information, see Searching for Packages.

Editing a Product

Products cannot be edited once added. If you have made a mistake, you must delete the product and re-enter. You can enter the Products window by clicking the **Products Management** link or checking the box in front of any product. This places you on the products text box where you can add or delete products.

Deleting a Product

1. To remove a product from the listing, click the **Product Management** link on the Configuration subtab.

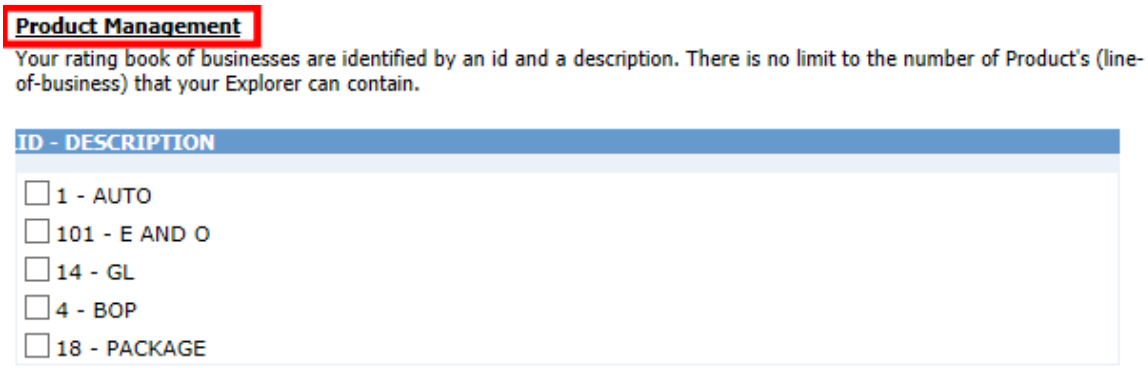


Figure 32 Product Management Window

2. This opens the **Products Management** window.

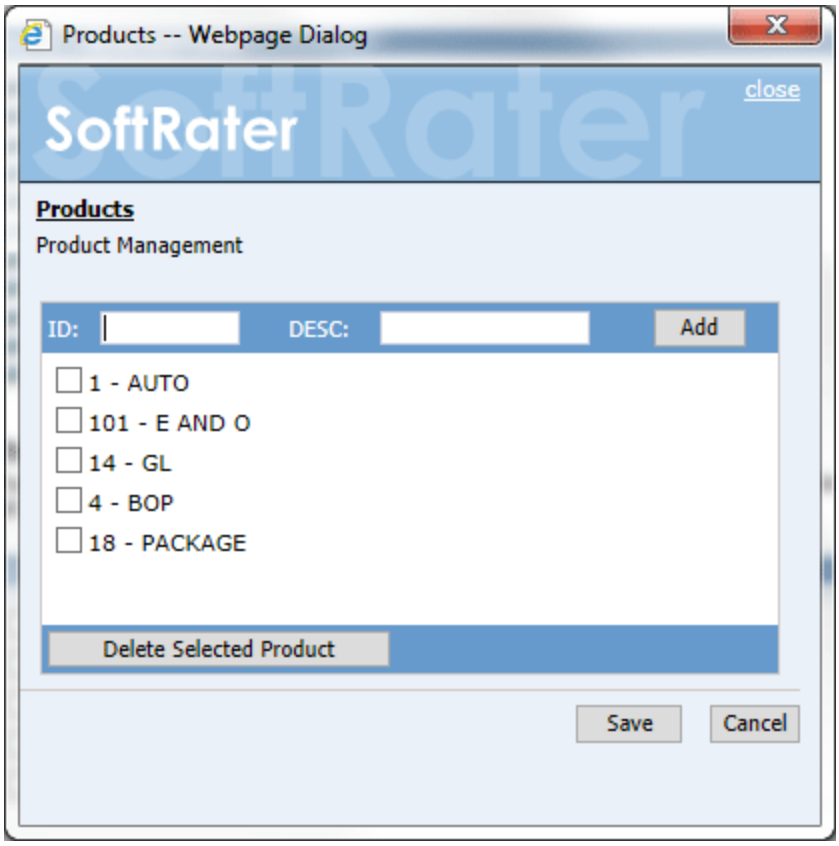


Figure 33 Selecting a Product to Delete

3. Place a checkmark next to all products you would like to delete.
4. Click **Delete Selected Product**.
5. The product(s) is deleted from the list. Once you have finished deleting product(s), click **Save**.

Virtual File Server Management

A Virtual File Server is used to pull SRPs from a SoftRater for Windows (Remote IBFA) environment that is separate from this one. Only the IBFA that is pulling in the SRPs needs to have the Virtual File Server created. The SoftRater for Windows (Remote IBFA) where you are pulling SRPs from does not need a Virtual File Server.

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

Adding a New Virtual File Server

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

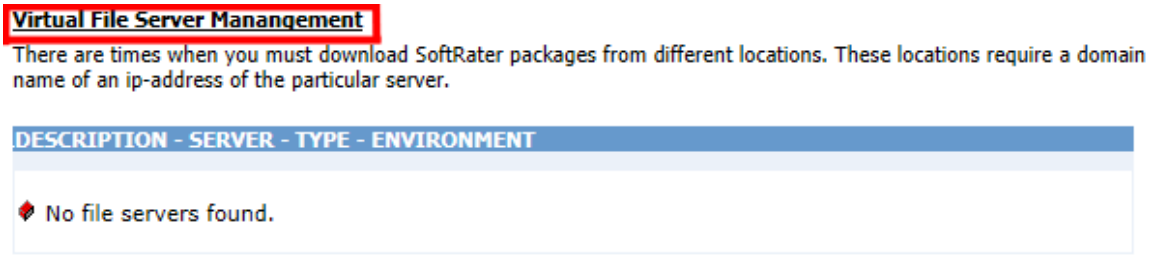


Figure 34 Virtual File Server Management Window

2. This opens the **Virtual File Server Management** window.

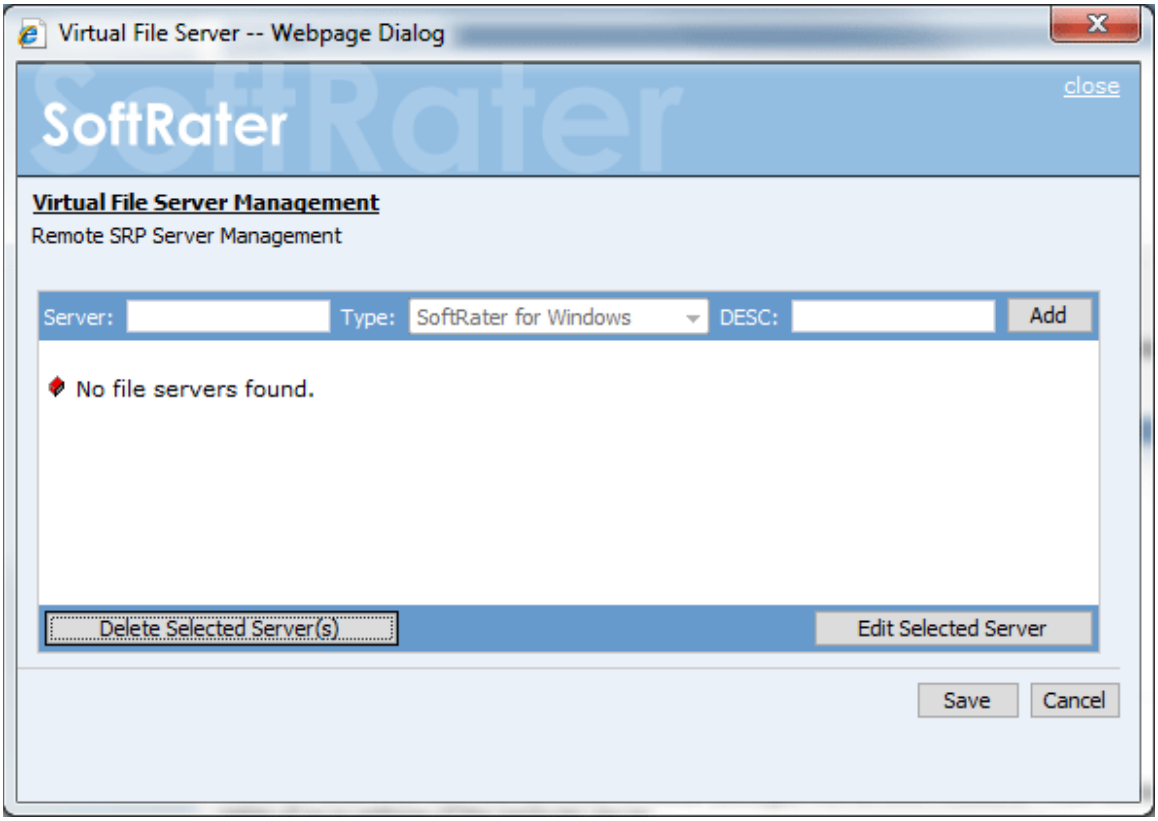


Figure 35 Virtual File Server Management Window

3. Enter the **Name of the Server** and a **Description**. You can use either the IP address or the server name. This is the engine location server.

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

4. Click **Add** to add the server to the list. Enter in as many servers as you need.

5. When you are finished, click **Save** to save your work and return to the previous window.

Editing a Virtual File Server

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

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

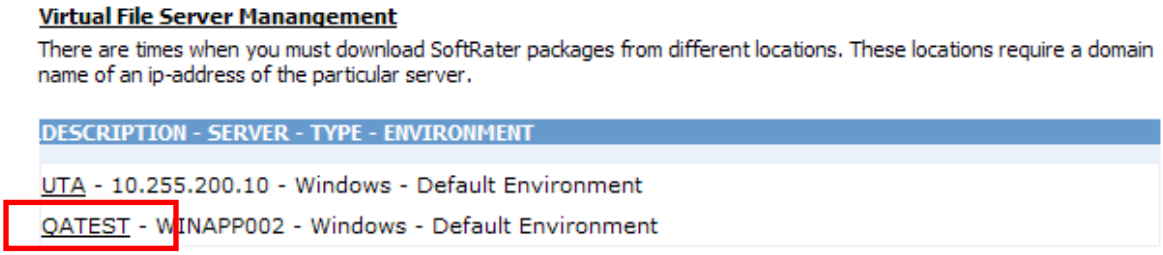


Figure 36 Virtual File Server Management

2. This opens the **Edit Virtual File Server** window.

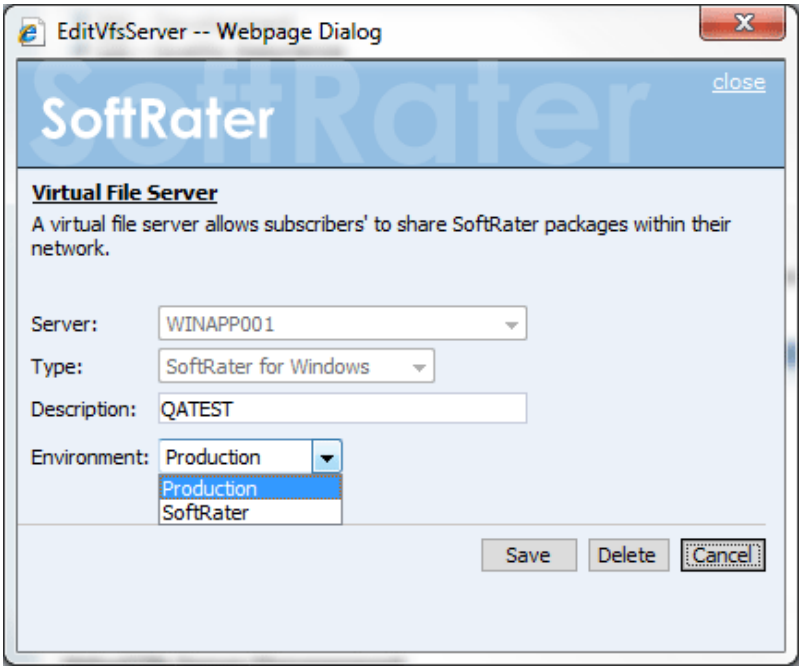


Figure 37 Editing Virtual File Server Management

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

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

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

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

Deleting a Virtual File Server

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

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

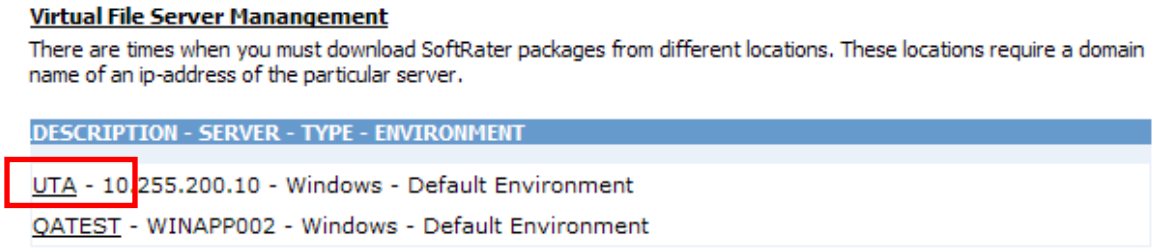


Figure 38 Virtual File Server Management Window

2. This opens the **Virtual File Server Management** window.

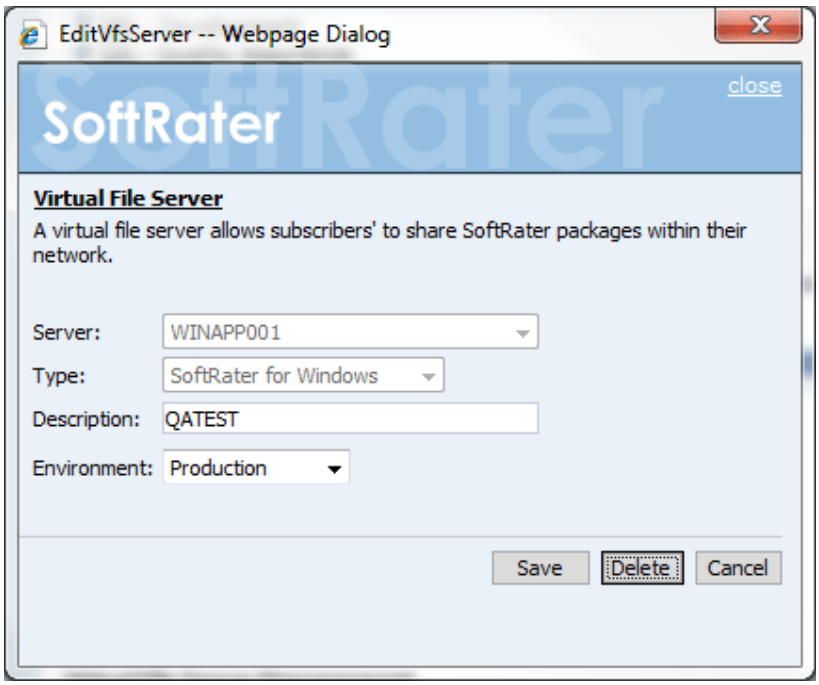


Figure 39 Deleting Virtual Server on Popup

3. Click **Delete**.
4. You will be asked to confirm deleting the server.

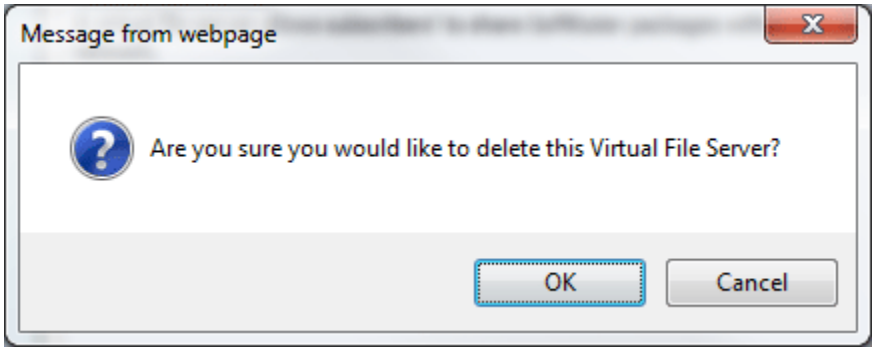


Figure 40 Confirming Deleting of a Virtual File Server Management

5. Click **OK** to delete the selected servers.
6. The configuration subtab will refresh and the deleted server will no longer be displayed.

Editing and Deleting from the Virtual File Server Management Window

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

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

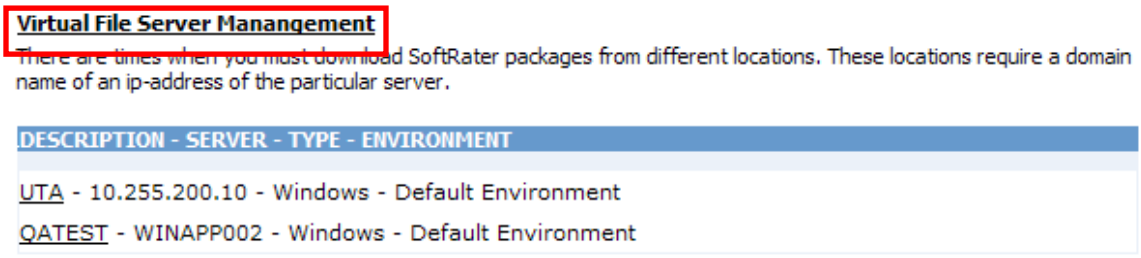


Figure 41 Virtual File Server Management

The Virtual File Server Management window is displayed.

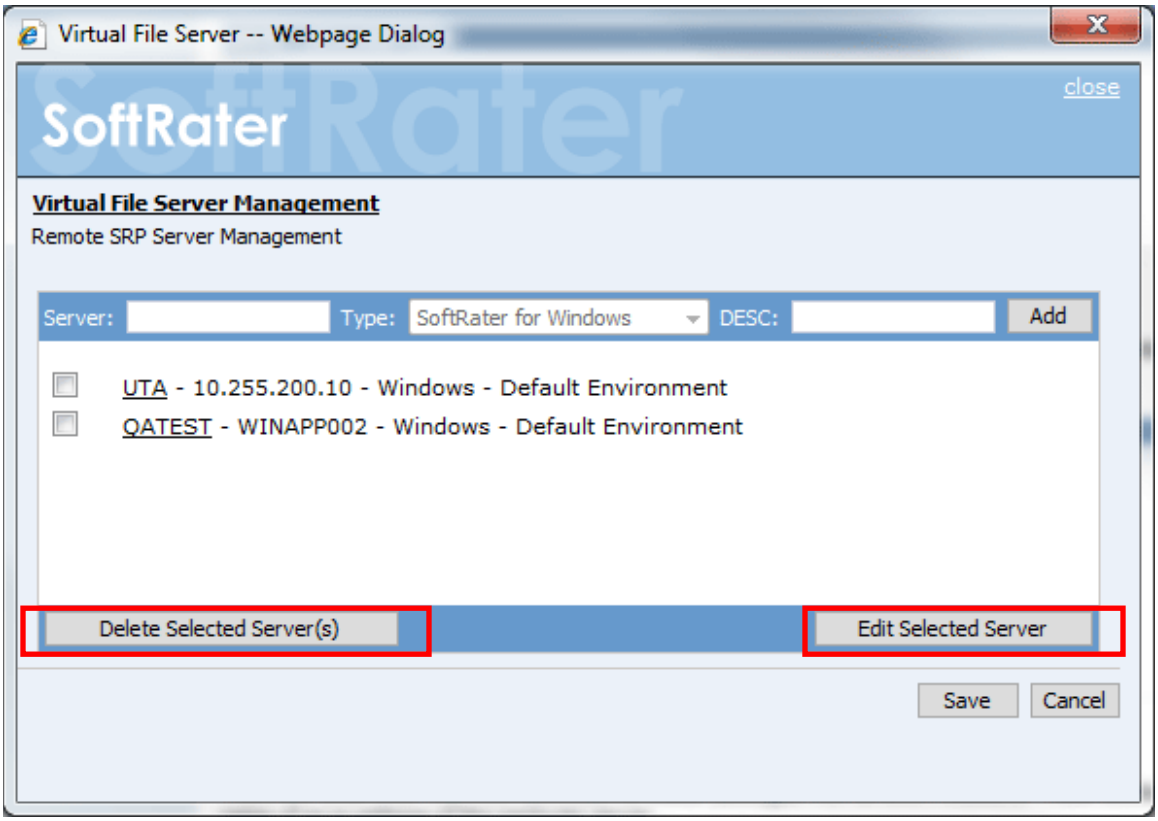


Figure 42 Deleting a Virtual File Server

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

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

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

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

ENVIRONMENTS SUBTAB

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

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

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

Configuring an Environment

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

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

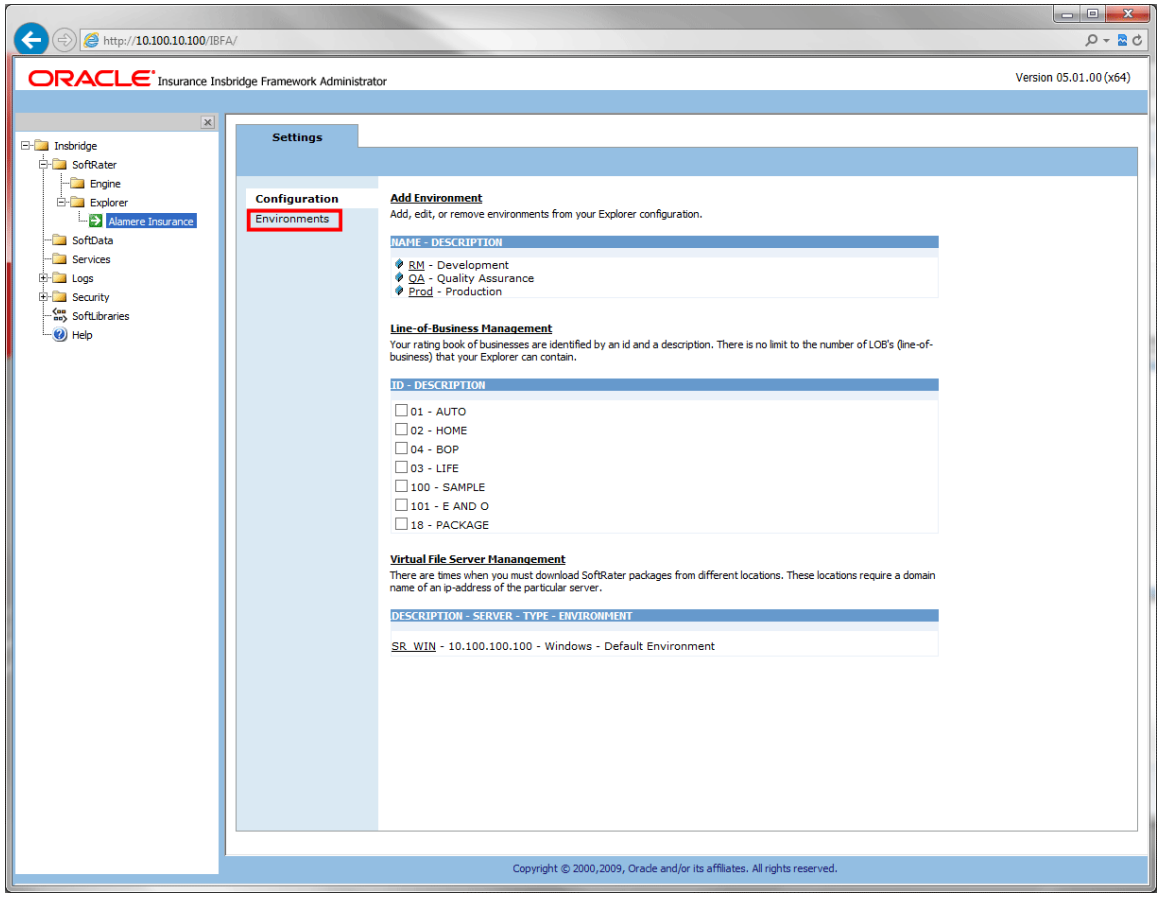


Figure 43 Configuration Subtab for Configuring an Environment

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

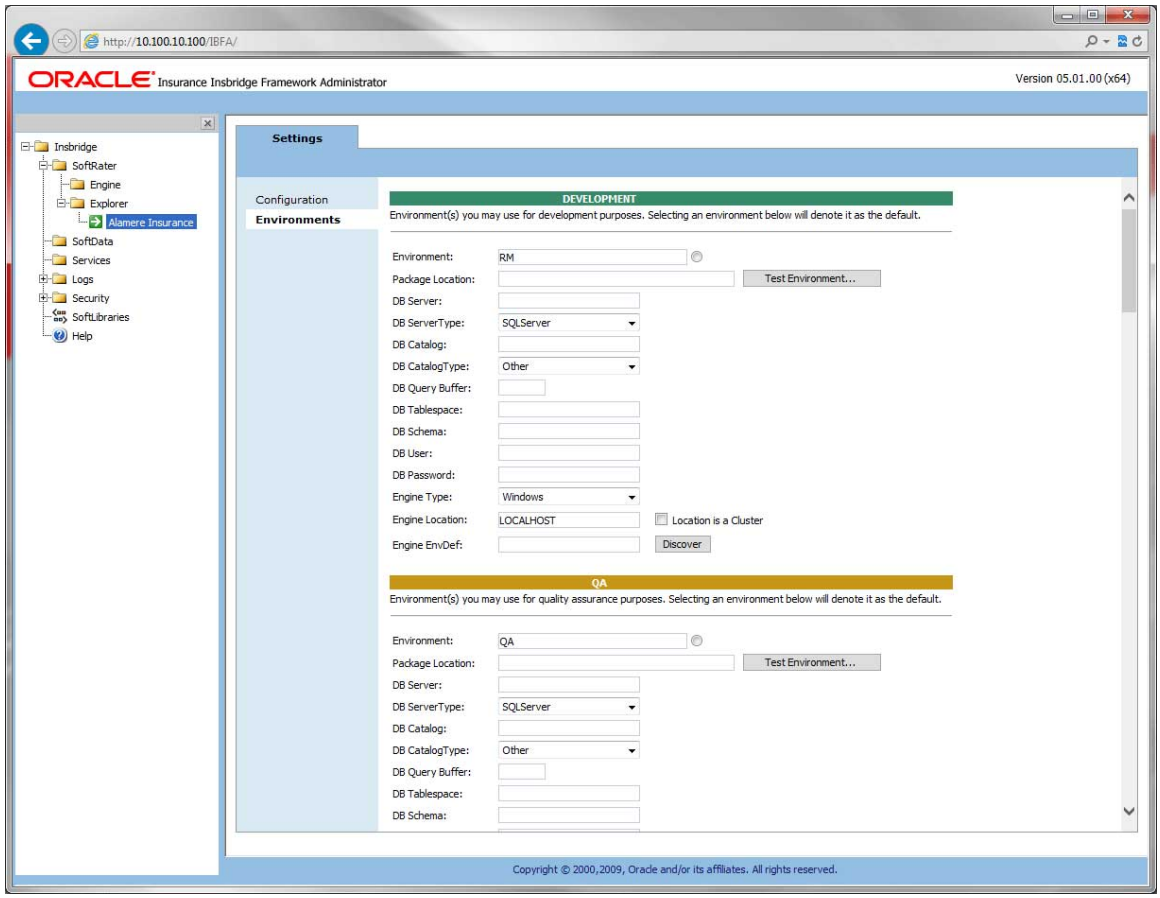


Figure 44 Configuring an Environment

Fields:

Fields must be complete for each environment.

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

	• SQL Server • Oracle • Oracle XE • DB2 • DB2 Mainframe If you select an Oracle XE database server type, a message will be displayed informing you that the schema for the environment has been changed to match the name of the environment. The DB schema cannot be changed.
DB Catalog:	The name of the catalog in the database. For DB2 servers, this is the System DSN Name. For Oracle servers, this is the instance.
DB Catalog Type:	The type of catalog in the database. The types available are: RateManager, SoftRater and Other. If you are using a SQL Server, you can choose either RateManager or SoftRater. If you are using an Oracle or DB2 database, you will need to choose Other and enter the remaining information.
***DB Query Buffer:**	For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. For DB2, enter a query size that is relative to the SQL statement heap size. For example, if your SQL statement heap size is 2048, you may want to enter a query size of 5. The larger the heap size, the larger the query size can be. You may also need to increase the application heap size. Query block is not needed for SQL Server or Oracle databases.
DB Tablespace:	For future use.
***DB Schema:**	The name of the schema that defines the structure of the database. This information may be obtained from the DBA. If DB Server Type Oracle XE is selected, the DB Schema name will be the same as the Environment Name.
DB User:	Username to access the database. This information may be obtained from the DBA.
DB Password:	Password to access the database. This information may be obtained from the DBA.
Engine Type:	The type of SoftRater engine that is used. The available options are: Windows, WebSphere, WebLogic or JBoss.
Engine Location:	The location of the SoftRater engine. If the engine is local to the Framework Administrator (i.e. located on the same server), leave this field as LOCALHOST. If the engine is located on a different server, enter the name in the box. WebSphere, WebLogic or JBoss must also include the port that is being used. • **WebLogic:** Port 7001 • **WebSphere:** Port 9080 • **JBoss:** Port 8080 The format for this is: [SERVER NAME]:[PORT NUMBER]

Location is a Cluster:	Check this field if the location is a cluster environment
Engine Location Instances:	Enter the location of the SoftRater instances found in the cluster. This can be a DNS name or IP address. This field is only displayed if the location is designated as a cluster environment.
Engine EnvDef:	This field should remain blank, unless the engine is located on a different server. If the **Engine Location** is set to LOCALHOST, leave this field blank. If the **Engine Location** is not LOCALHOST, this should match the name of the environment on the remote server.

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

Creating a RateManager Environment

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

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

Creating a SoftRater Environment

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

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

2. This opens up the Environments subtab. The environments you previously setup are listed. If an environment is missing, you must return to the Configuration subtab and add it.
3. The **Environment Name** is complete. No changes are needed.
4. Enter in the file path where you want packages stored in the **Package Location**. Use the Test Environment option to have the location created for you.
5. Enter in the **DBServer** name or IP address. This is the database server where the SoftRater database was restored or created.
6. Select the **DB Server Type** that you are using.
7. The **DB Catalog** is the name of the SoftRater database restored in SQL Server or created in Oracle or DB2.
8. The **DB Catalog Type** is **SoftRater**.
9. **DB Query Buffer** may be required. For certain Database Management Systems (DBMS), system batch query optimization is required for performance and/or because of limits on/in the system. This value will control the maximum number of batch query operations that can be submitted to the target DBMS in any one transaction. It is known that for certain DB2 platform versions a value of 31 is required because of a hard software limit
10. **DB Tablespace** is not required for a SoftRater environment.
11. The **DB Schema** is the name of the schema that defines the structure of the database. This information may be obtained from the DBA.
12. Enter the **DB User** name and **Password**.
13. Select the **Engine Type**.
14. The **Engine Location** is the location of where you installed the SoftRater engine. You can use the server name or IP address. For WebSphere, WebLogic or JBoss, you must also include the port. For example, a WebLogic server may have “WBServerName:7001” as the entry.
15. The **Engine EnvDef** is the server name if the engine is located on a different server. You can use the server name or IP address.
16. Click **Save** to save your entries.

Creating a SoftRater Oracle XE Environment

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

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

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

1. On the Settings tab, select **Environments**.
2. This opens up the Environments subtab. The environments you previously setup will be listed. If an environment is missing, you must return to the Configuration subtab and add it.
3. The **Environment Name** will be complete. No changes are needed.
4. Enter in the file path where you want packages stored in the **Package Location**. The package location must be on the server where IBFA is located. Use the Test Environment option to have the location created for you. If you have not loaded a package to the XE environment, you may receive an error message instructing you to run the DDLs. DDLs will be run against an XE environment the first time you load a package. You do not need to run the DDLs prior to loading any packages.

5. Oracle XE must be on the same server as IBFA. The **DBServer** is **LOCALHOST**.
6. The **DB Server Type** will be **Oracle XE**. When you select an Oracle XE database server, an information window will be displayed. The schema will be changed to match the name of the environment.
7. Click **OK**.

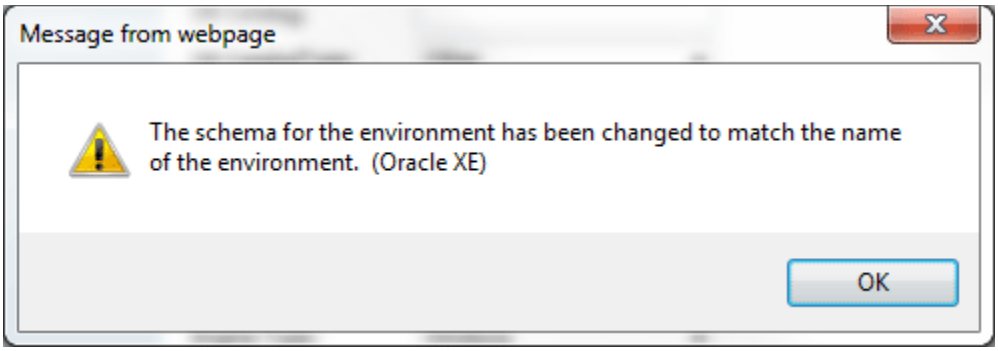


Figure 45 Oracle XE Message

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

Test Environment

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

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

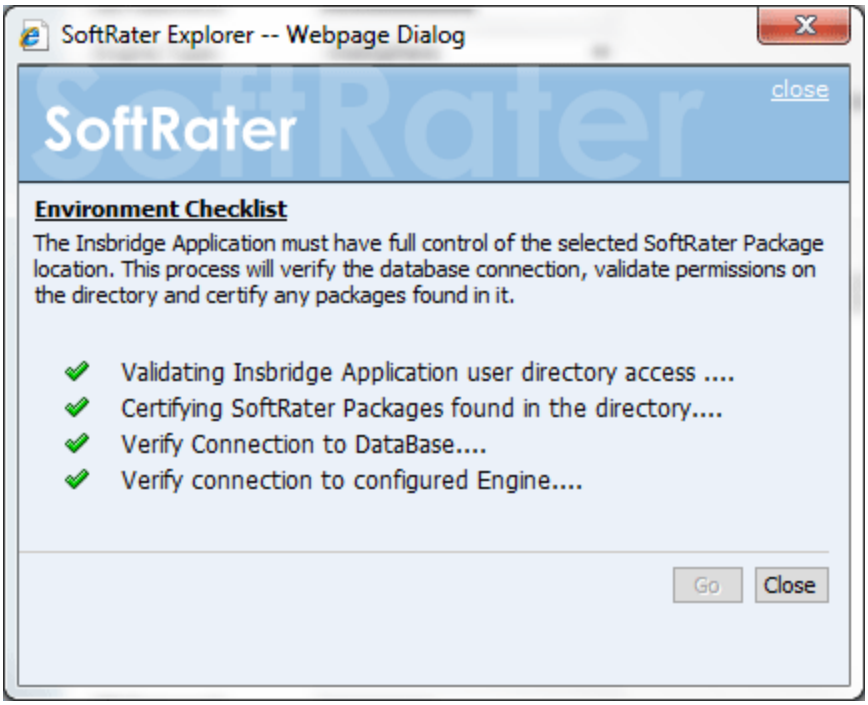


Figure 46 Test Environment

To Test the Environment

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

There are three result icons:

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

Warning icons may be present when:

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

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

Discovering Environments

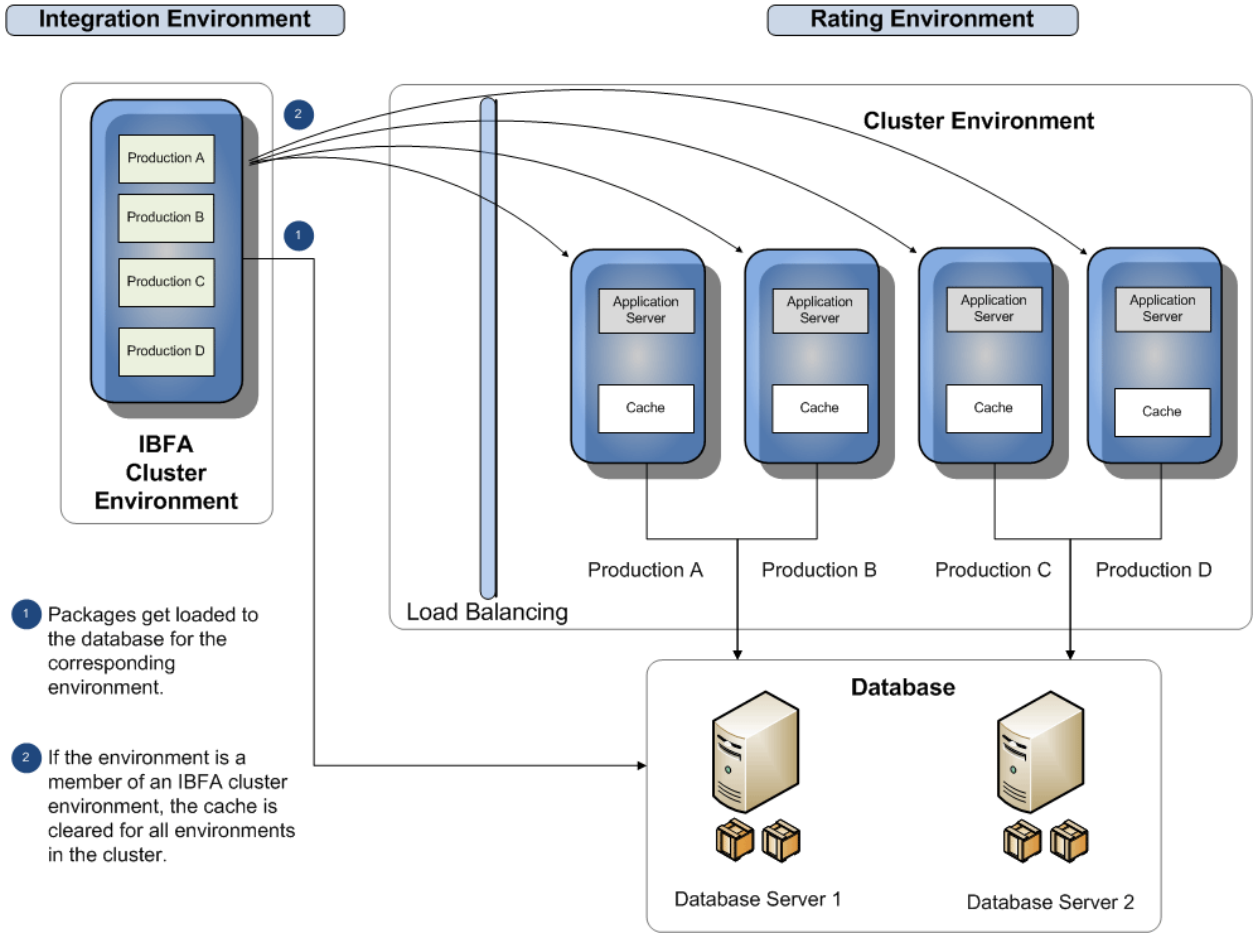
For remote environments, you can click DISCOVER to validate server and engine location. Local environments will not be able to use this function.

Figure 47 Discover Environment

CLUSTER MANAGEMENT IN IBFA

Rate requests include a program (package) ID and a selected rating environment. The first time a rate request is sent down, for example, from a policy admin system; the application server that holds the selected rating environment retrieves the requested rate package from the database and stores it in cache. When another rate request is sent down that utilizes the same package, if it is already stored in cache, the cached package is used. This increases efficiency and allows for rate requests to be returned faster. Packages are cleared out of cache when an updated package is loaded from IBFA or the clear cache command is performed.

When the selected rating environment is a part of a cluster, cache may not always get cleared out properly. To make sure that cache is cleared out of all servers in a cluster, a cluster environment should be created in IBFA. The cluster environment contains all members of the cluster and treats the load balancing or controller server as an environment.



Loading Packages in a Cluster Environment

When a package is loaded into a cluster environment in IBFA, the cache is cleared for all environments in the cluster. This prevents any environment from having outdated packages in cache.

CLUSTER SETUP

First, each server to be included in the cluster should have a SoftRater instance. The instance must be identical on all servers. Then a cluster environment can be created in IBFA.

- A cluster environment location must be the load balancing or controlling server.
- The package location is any location on the IBFA server.
- The database server can be any database in the cluster environment. Databases can be mixed. An Oracle database and a SQL database can be in the same cluster. All the information for the database entered must be for the database server entered. For example, if you have an Oracle database and a SQL Server database in a cluster, and you enter the Oracle database as the database server, you must enter the Oracle database information for the server type, catalog, catalog type, database schema, database user and database password. You cannot enter the Oracle database server with any SQL Server information.
- The servers in the cluster environment must be the same type of application server and must use the same Engine Environment Definition. For example, the cluster must contain all WebLogic application servers or all IIS application servers, as found in a SoftRater for Windows node.

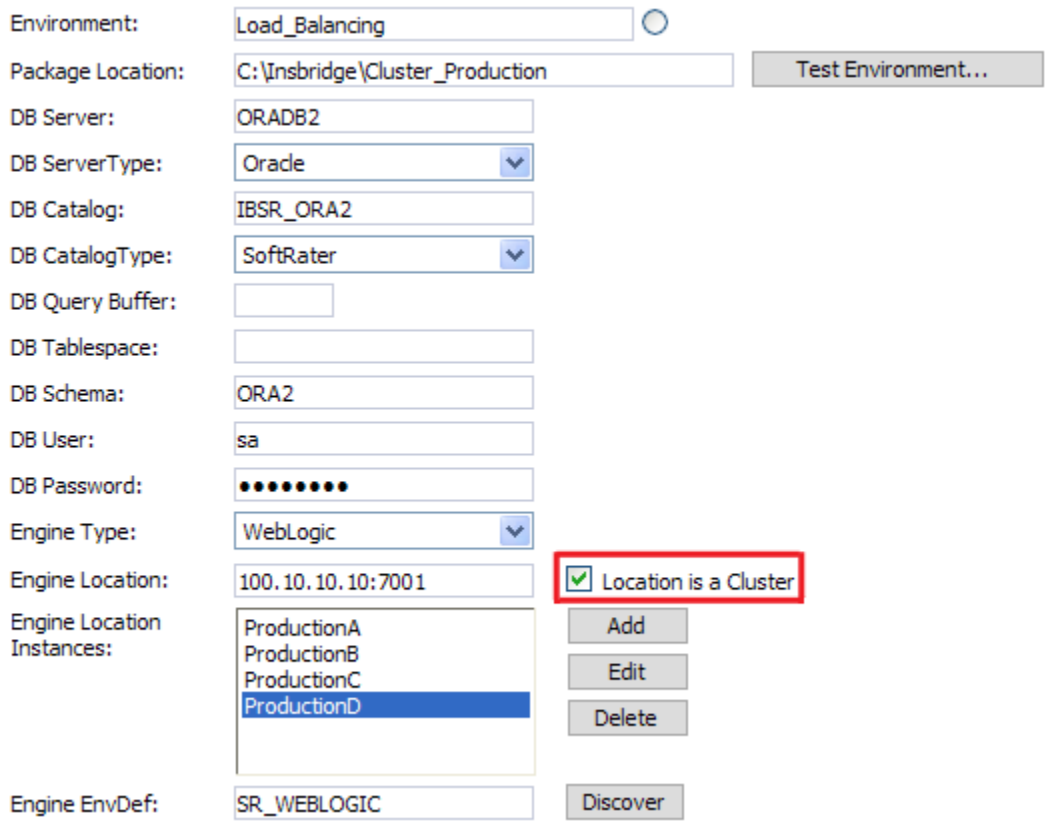


Figure 48 IBFA Setup of a Cluster Environment

Setting Up a Cluster

Enter the information for the environment type that you are using, for example a SoftRater environment. There are a few additional steps to be performed.

1. On the engine location, check Location is a Cluster. This opens the engine location instances.
2. Enter in each server located in the cluster that has a SoftRater instance.
3. Finish your entry and **Save**.

Cluster Environment in Production

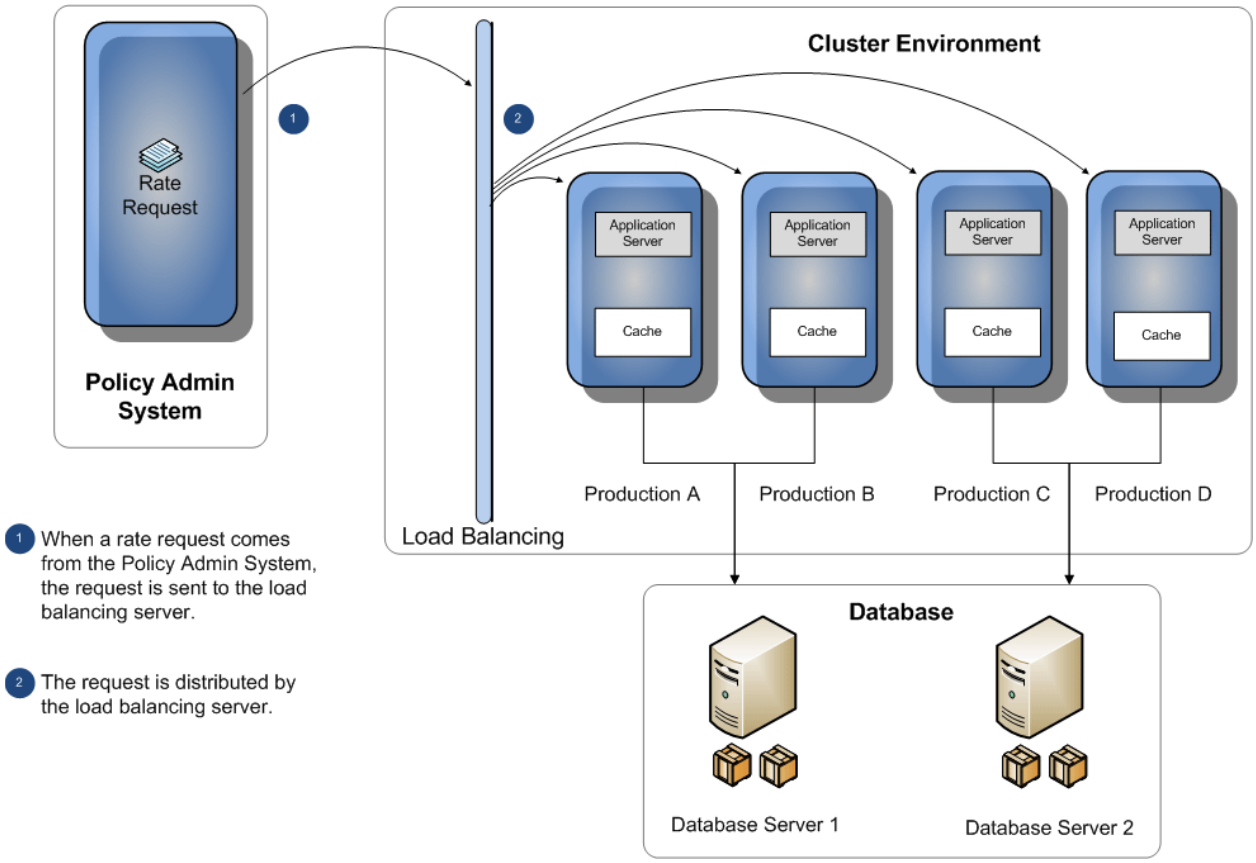


Figure 49 Rate Request Flow in a Cluster

In a cluster environment, when a rate request comes from the policy admin system to the load balancing server, the load balancing server can send the request to any member of the cluster and the correct package will be used for rating.

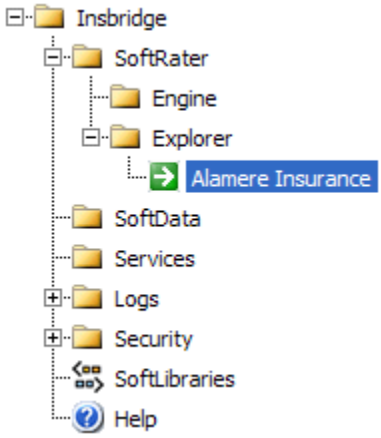
How the cluster is setup or receives rate requests is at the discretion of the customer.

CONTENT TAB

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

Navigating to SoftRater Explorer Content Tab

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



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

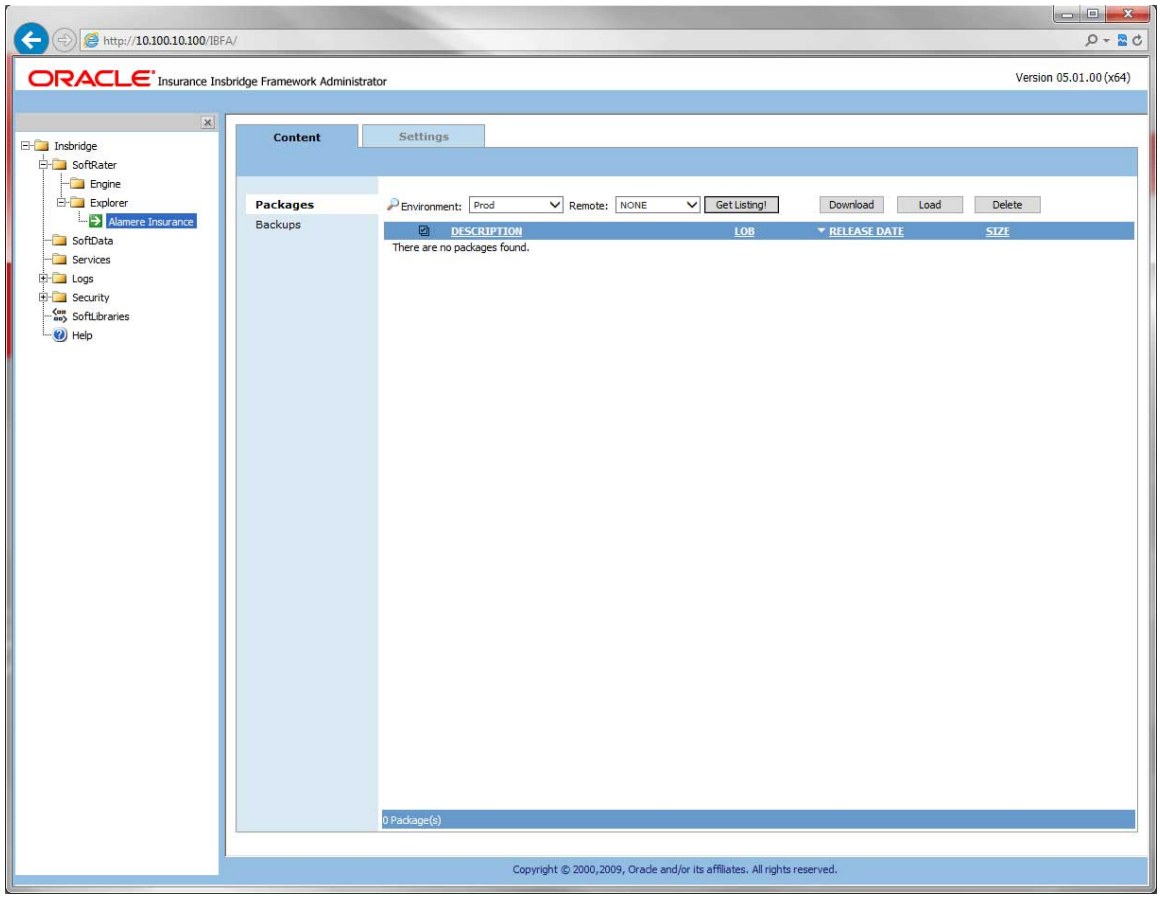


Figure 50 SoftRater Explorer – Content Tab

The Content tab has two subtabs:

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

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

Chapter 6

PACKAGES

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

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

SoftRater Packages

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

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

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

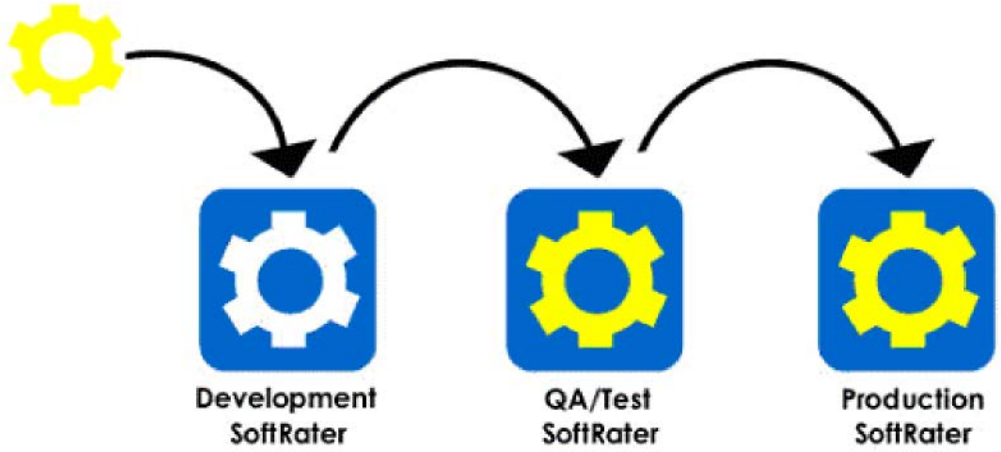


Figure 51 SoftRater Packages

FUNCTIONALITY

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

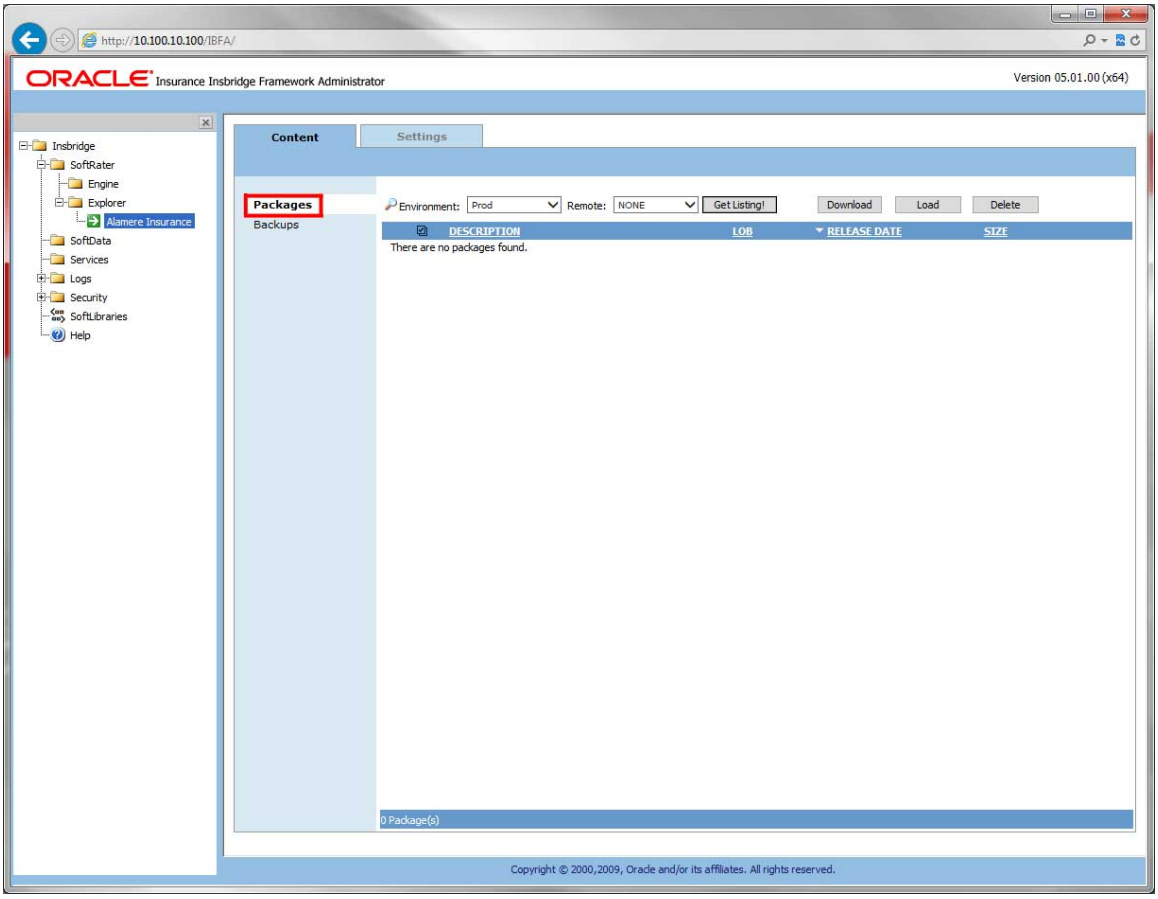


Figure 52 Content Window in IBFA

Functions:

Environment: QualityControl	**Environment:** Select the Environment where you want to view the package listing. SoftRater environments that you have configured on the Settings→Environments Tab will be listed here. If Custom Authentication is being used, only logged in users will see secure environments.
Remote: NONE	**Remote:** Select the remote Windows environment where you want to view the package listing. Virtual Files Servers that you have configured on the Settings→Configuration Tab are listed here. If Custom Authentication is being used, only logged in users will see secure environments.
Get Listing!	**Get Listing!:** After you have selected the environment where you want to view the package listing, click Get Listing to update the list of packages and releases.
Download	**Download:** Download remote packages and releases to the

	local environment. For remote environments, select the packages or releases you want to bring in to your local environments and click Download.
Load	**Load:** Loads the selected packages or releases to the local database.
Delete	**Delete:** Removes the selected package or release from the listing.

FIELDS

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

Releases Listing

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

	A package has been loaded.
	A package contained within this release has been unloaded from the release. Packages are unloaded when an updated version is created. To see which package has been unloaded, highlight the release and right click Select Show Details. The lower portion of the window displays the contents of the release. If the package icon is displayed, that package is still included. If the package icon has been removed, that package has been unloaded.
	The package is no longer on disk, but only in the database.
	A release is unlocked an open for updating. Releases are locked in RateManager.
	A package that was created using ESI. This icon will be displayed in front of the package name. ESI packages are not system generated. ESI packages are entered directly into the database. See External API Access within this guide and The ESI User Guide for information on working with ESI.
	A package that is available for download. This icon is displayed when a package is located on another server and can be downloaded. Once the package is downloaded, the icon is removed.

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

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

Product: The product where the package was created. Releases do not have a product.

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

Size: The size of the package or release.

Right Click Options

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

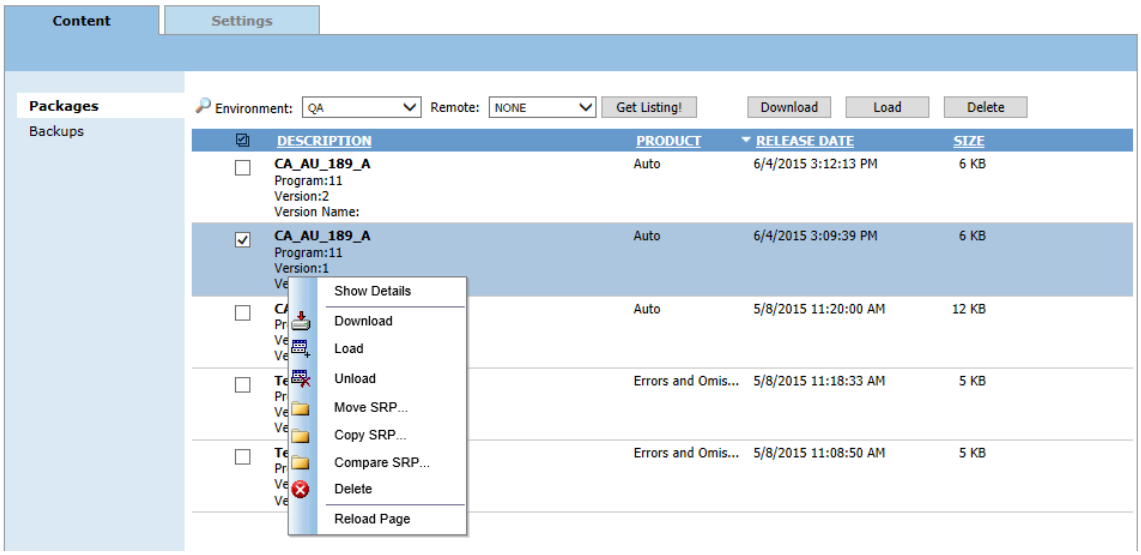


Figure 53 Right Click Menu for the Packages Subtab

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

Processing Options

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

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

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

Delete requests are processed immediately and does not send notifications when complete.

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

Downloading Packages

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

To Download a Package

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

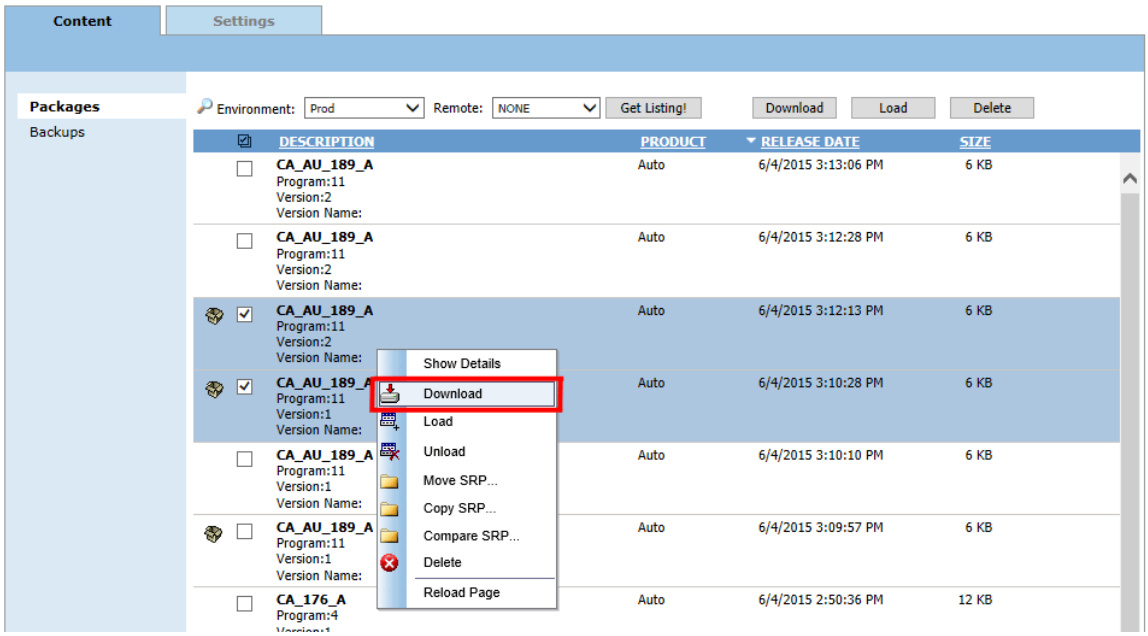


Figure 54 Selecting Packages to Download

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

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

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

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

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

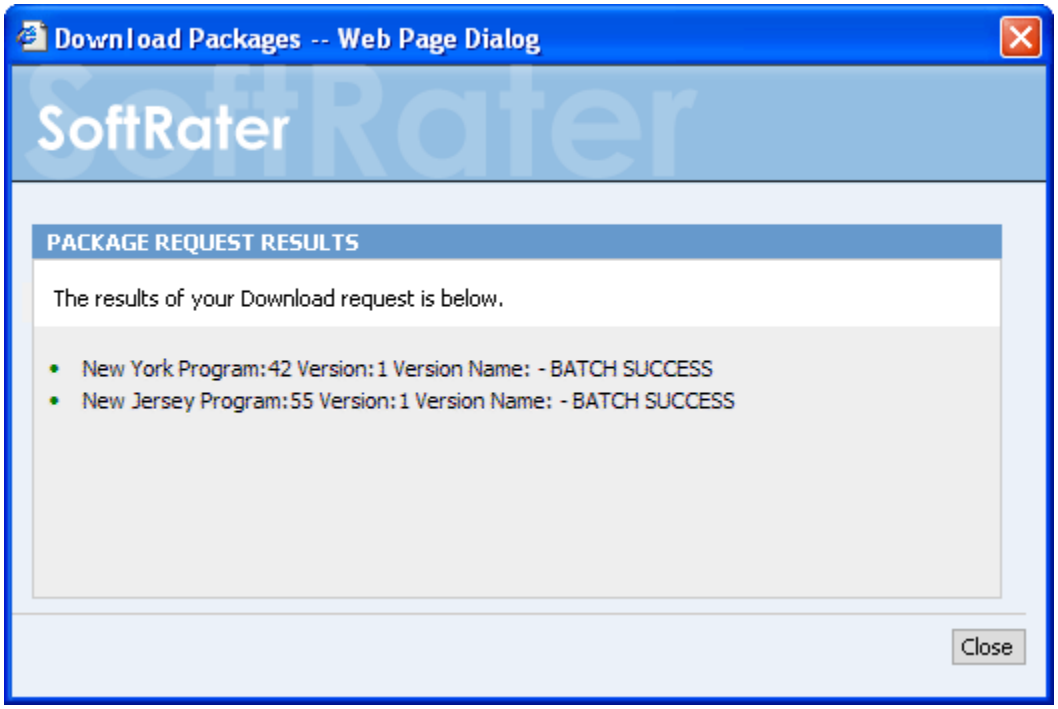


Figure 55 Download Package Results

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

Loading Packages

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

To Load a Package

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

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

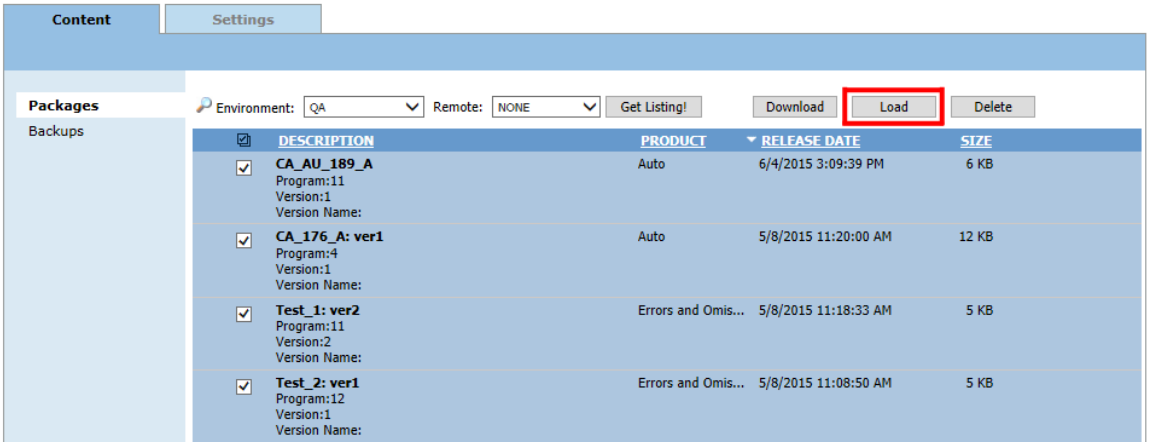


Figure 56 Selecting Packages

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

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

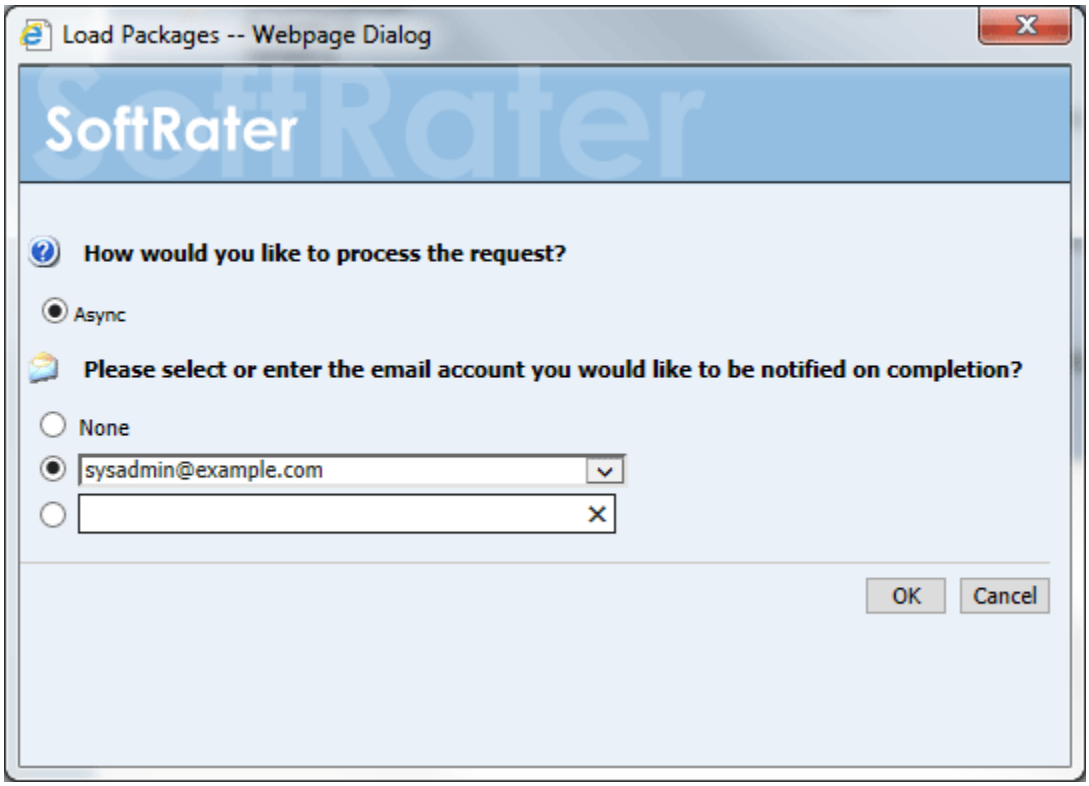


Figure 57 Loading a Package

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

   - If you chose the Sync load option, the package listing should refresh and an icon ( ) will appear next to the loaded package.

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

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

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

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

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

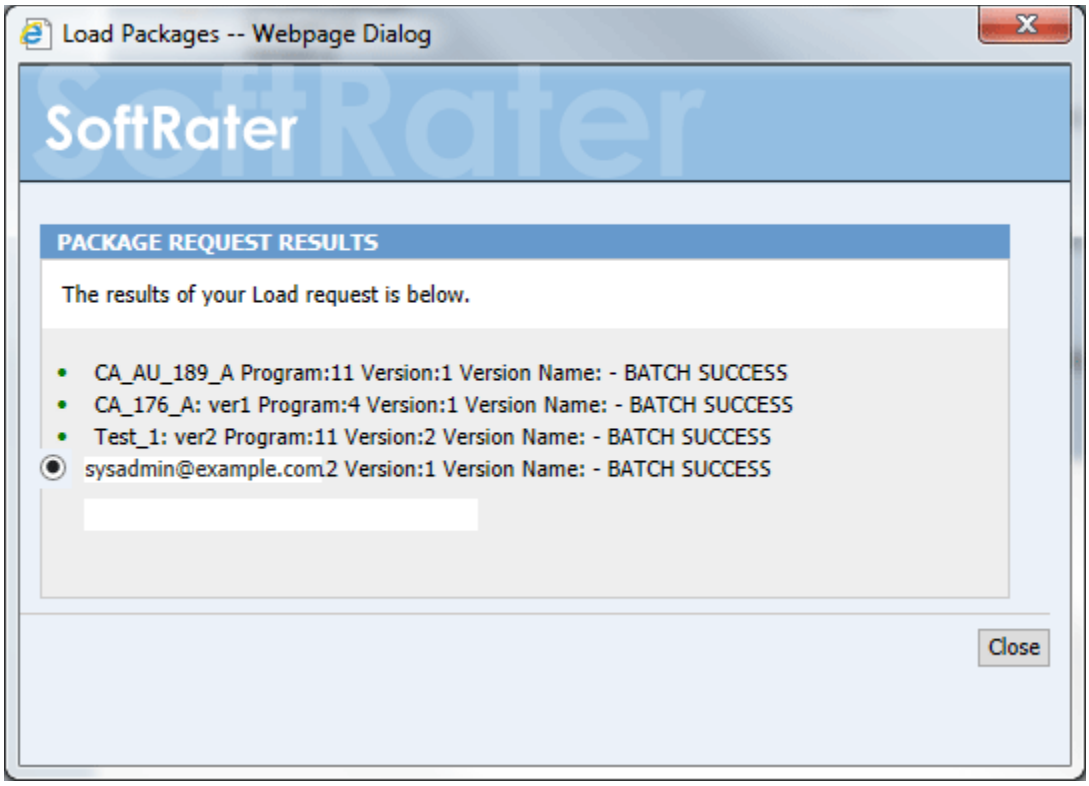


Figure 58 Load Packages Results

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

Unloading Packages

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

To Unload a Package

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

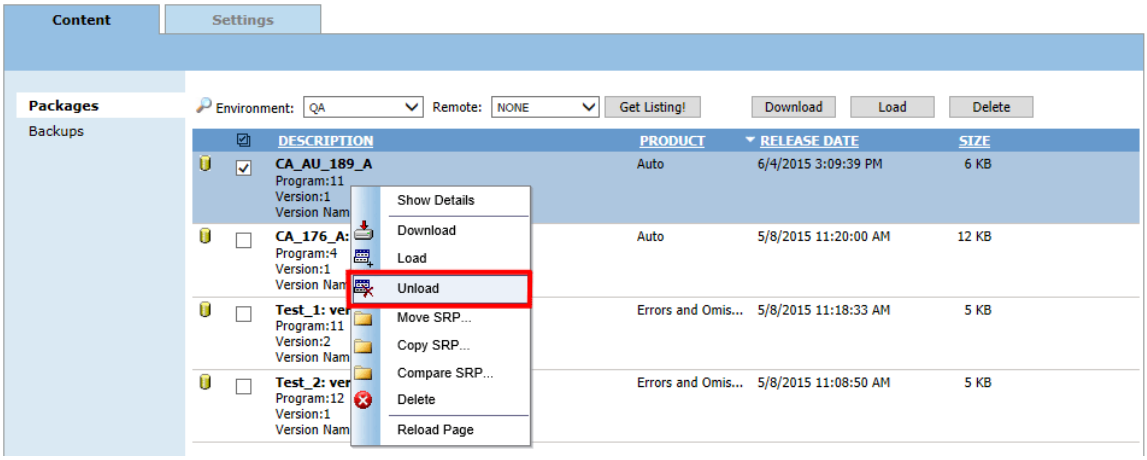


Figure 59 Selecting Packages to Unload

4. Right click one of the selected packages and choose **Unload** from the menu.
5. When you have finished choosing your options, click **OK**.

   - If you chose the Sync unload option, the package listing should refresh and the unloaded package will no longer have an icon ( ) next to the name.
   - If you chose the Async unload option, you should receive a message that the request was successful.

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

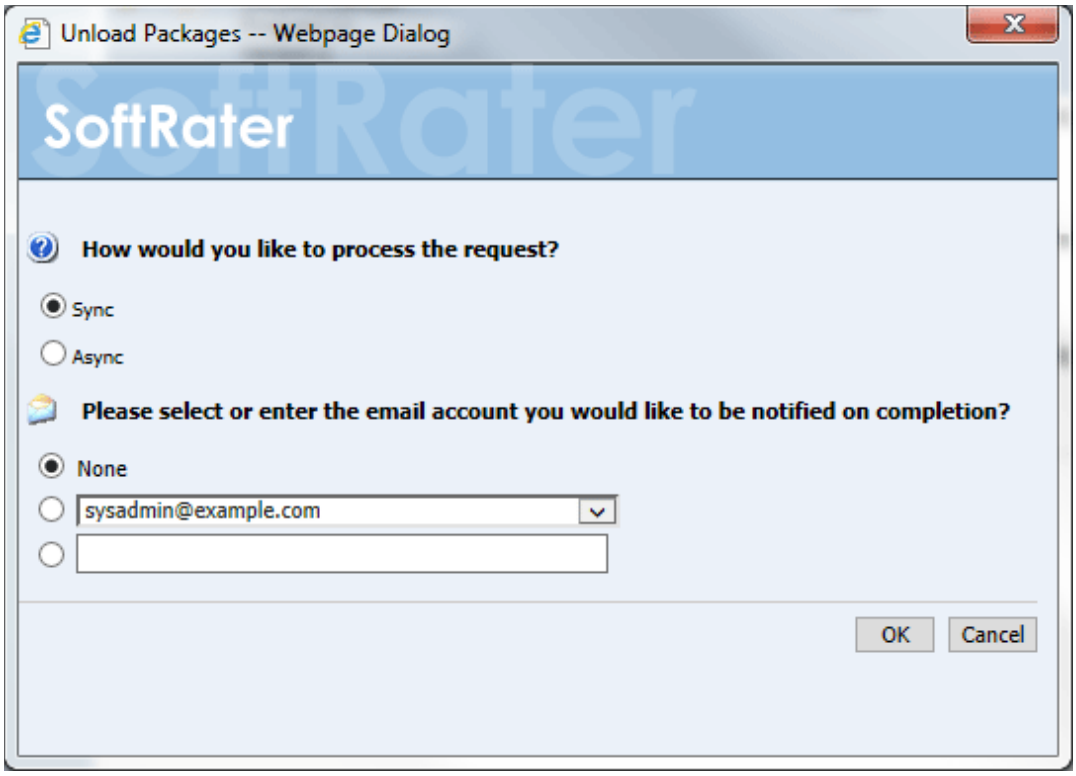


Figure 60 Unloading SoftRater Packages

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

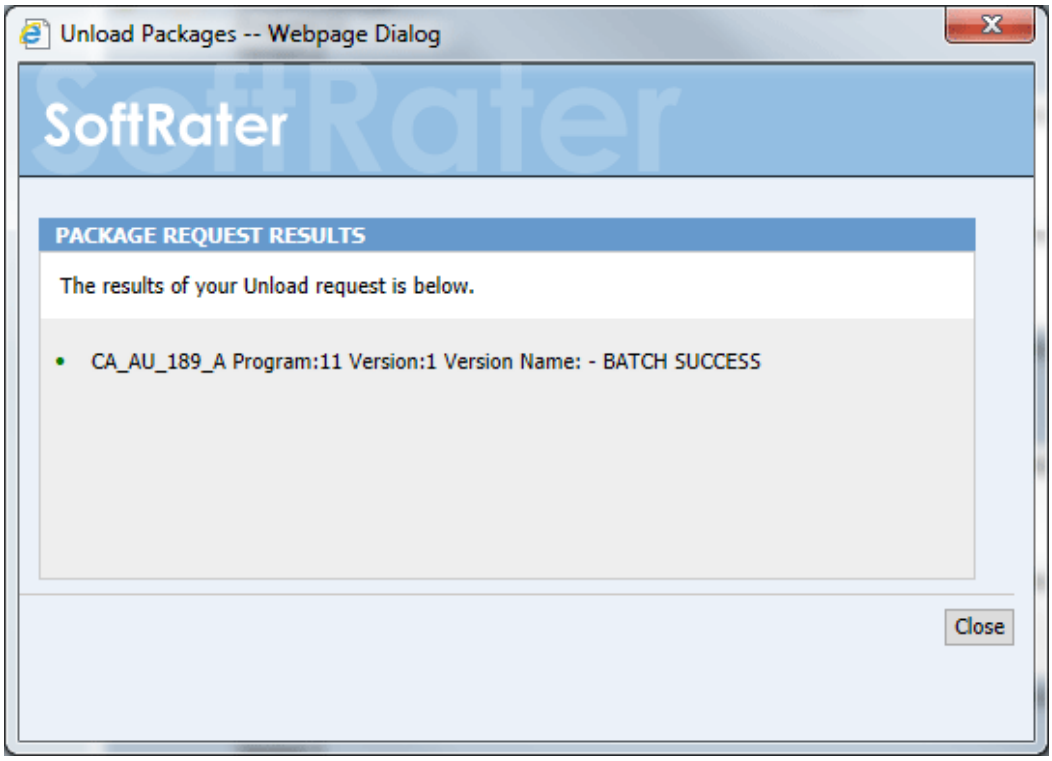


Figure 61 Download Package Results

Moving Packages

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

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

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

To Move a Package

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

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

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

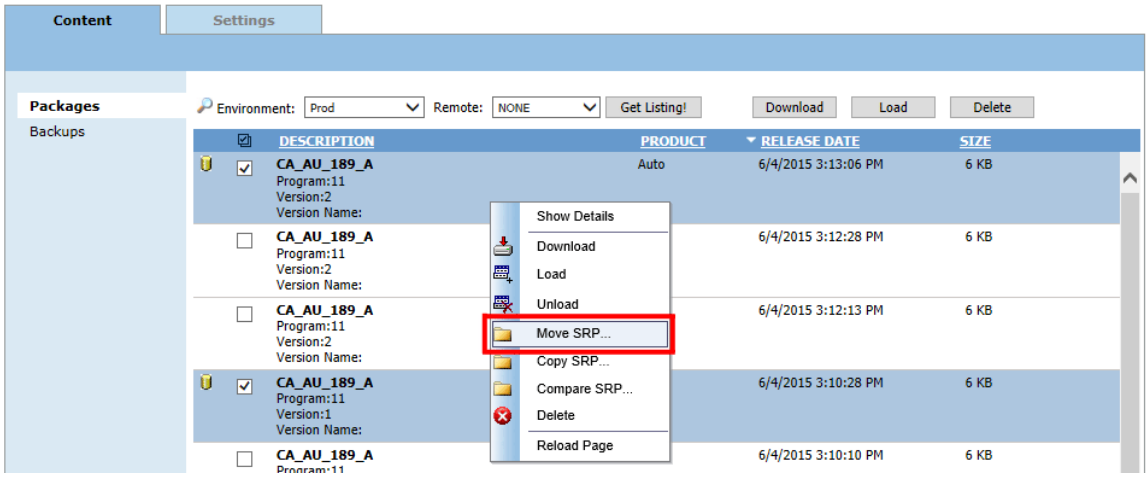


Figure 62 Selecting Packages to Move

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

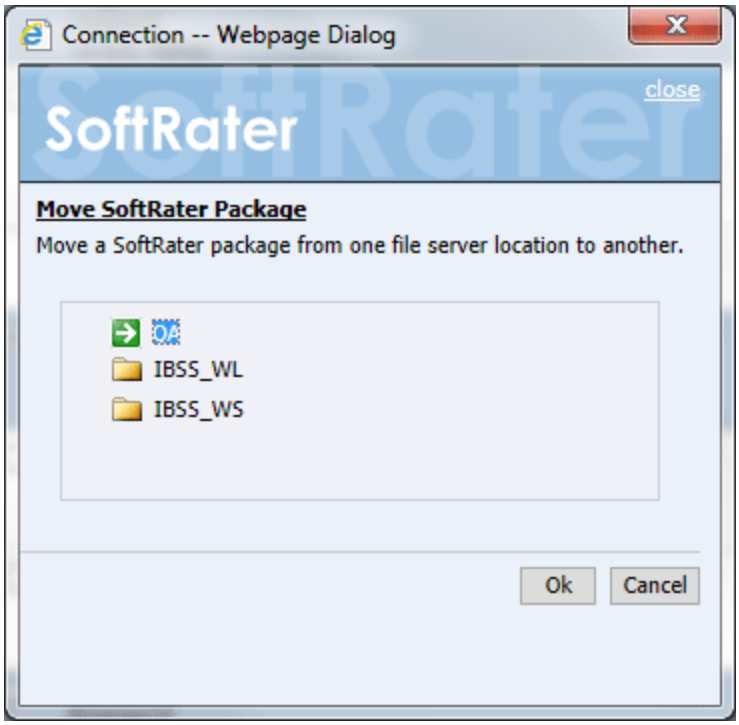


Figure 63 Moving SoftRater Packages

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

Copying Packages

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

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

To Copy a Package

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

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

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

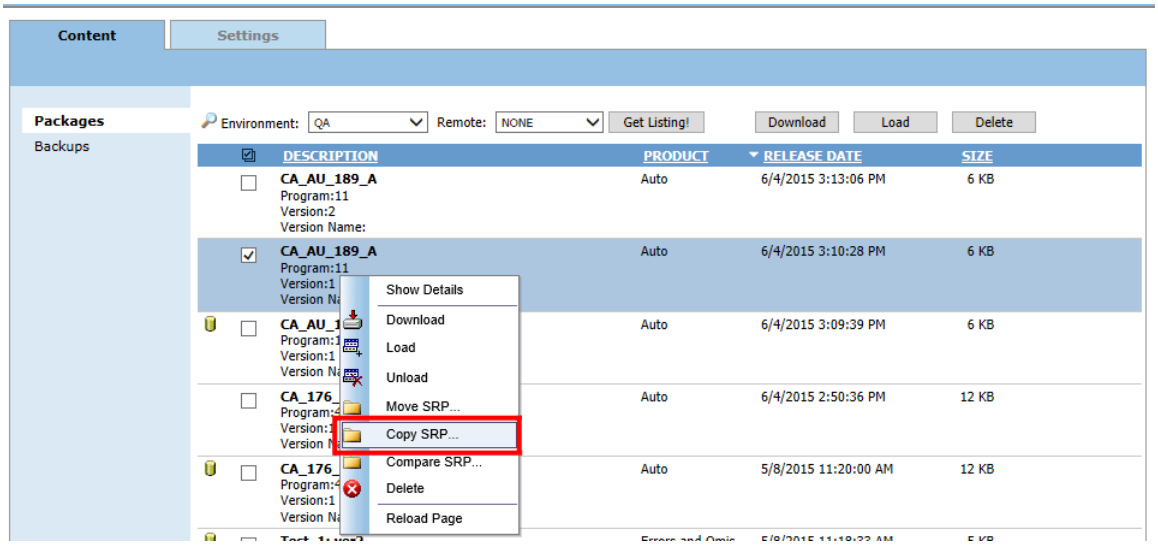


Figure 64 Selecting Packages to Copy

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

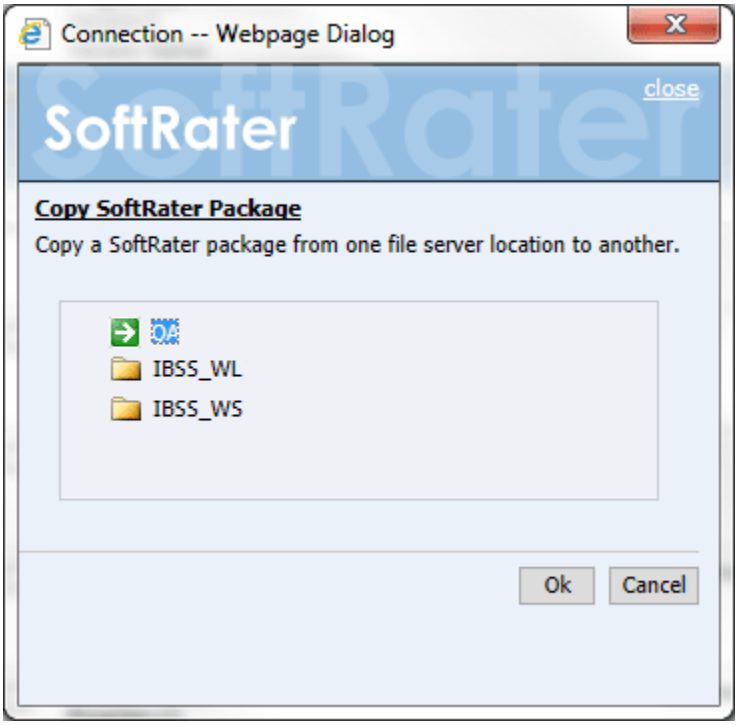


Figure 65 Copying SoftRater Packages

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

Deleting Packages

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

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

To Delete a Package

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

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

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

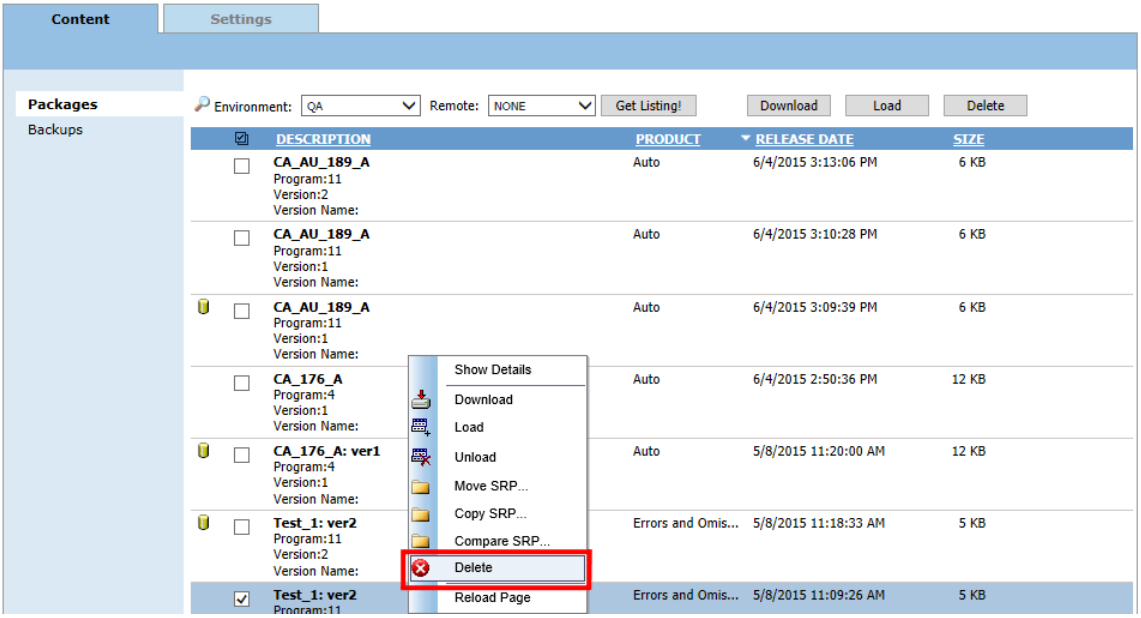


Figure 66 Selecting a Package to Delete

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

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

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

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

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

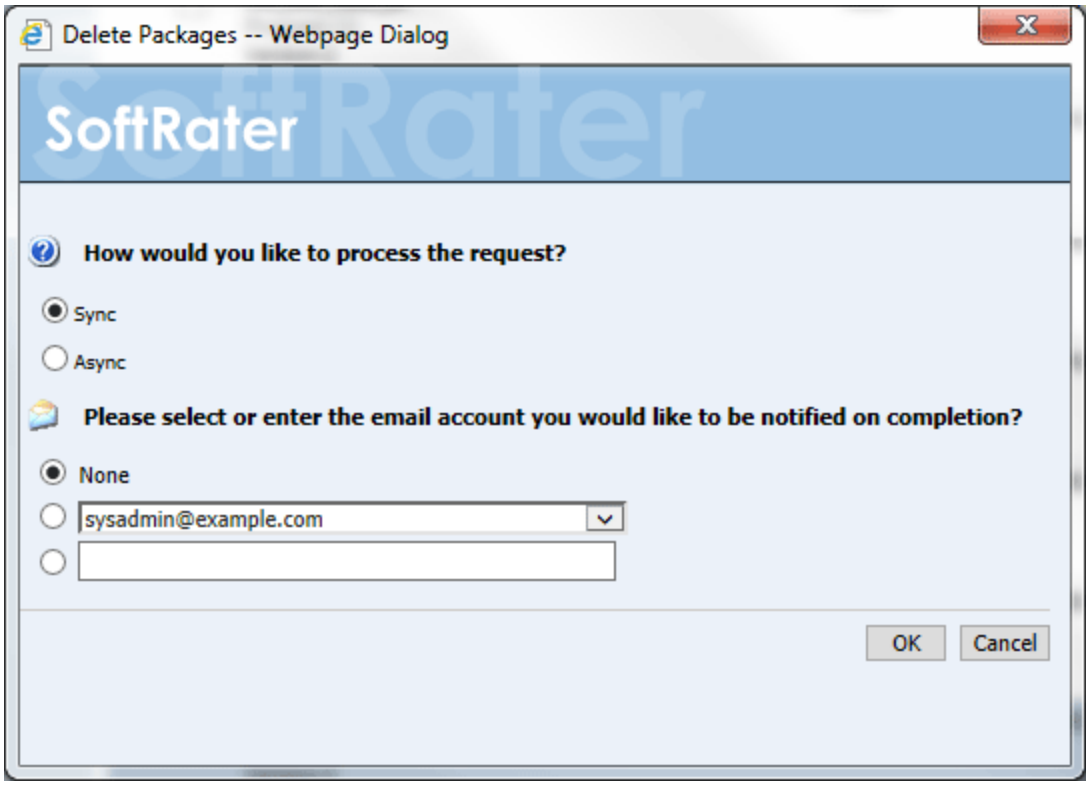


Figure 67 Deleting SoftRater Packages Results

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

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

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

Compare SRP Report

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

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

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

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

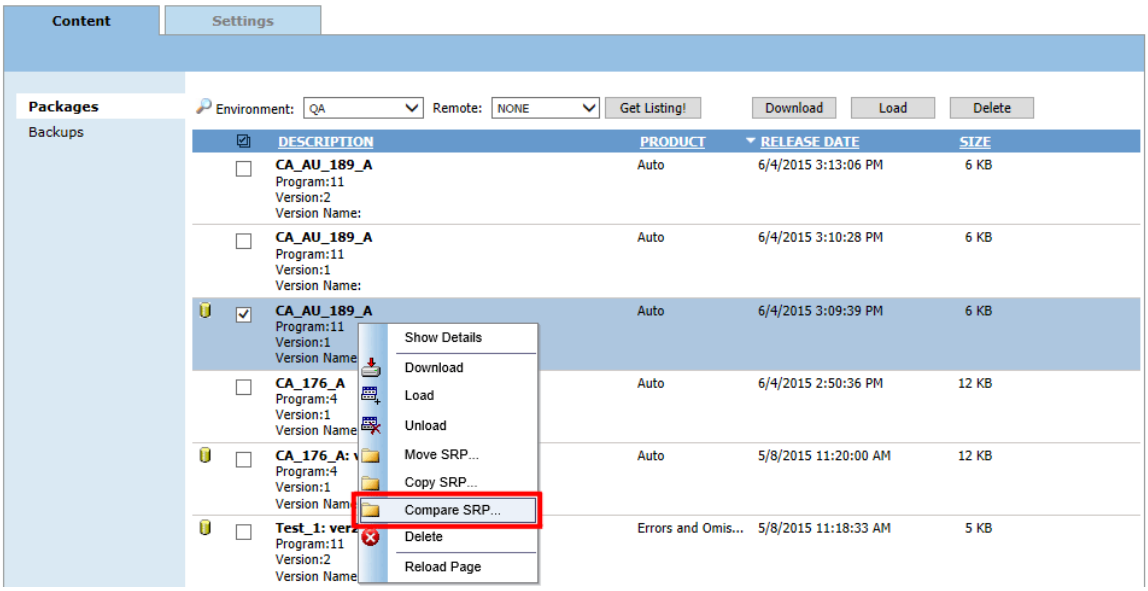


Figure 68 Comparing Packages

Running a Package Difference Report

1. On **SoftRater Explorer**, select the appropriate subscriber.
2. The Packages subtab will automatically load the list of packages for the default environment. You can select a different environment and click **Get Listing** to update the list of packages.
3. Select a program where you want to run a Program Difference Report.
4. Right click and Select **Compare SRP** from the menu. The Program Difference Report wizard will be displayed.

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

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

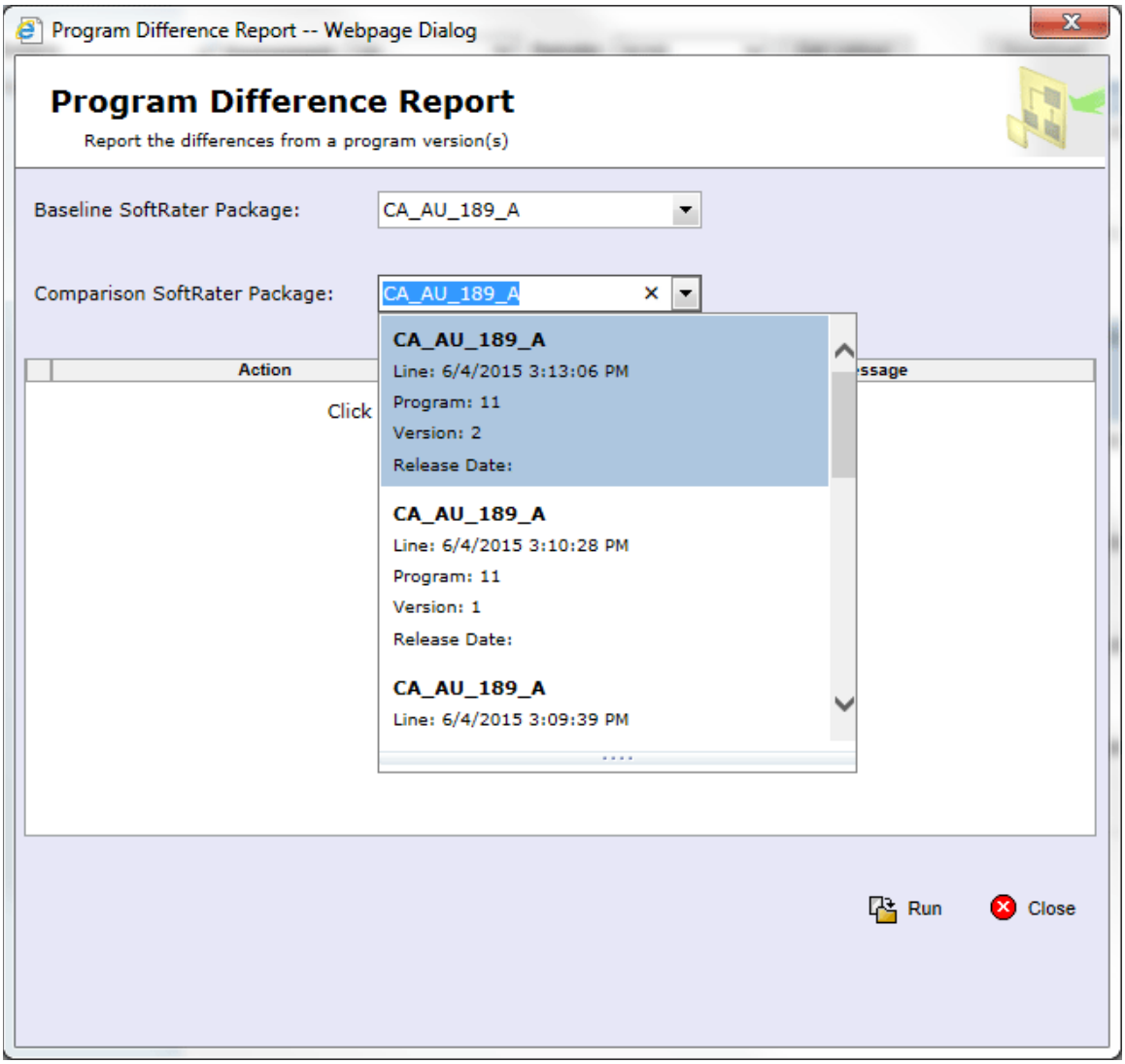


Figure 69 Program Difference Report Select

7. Click **Run**. This starts the report. The progress will be displayed as the report runs.

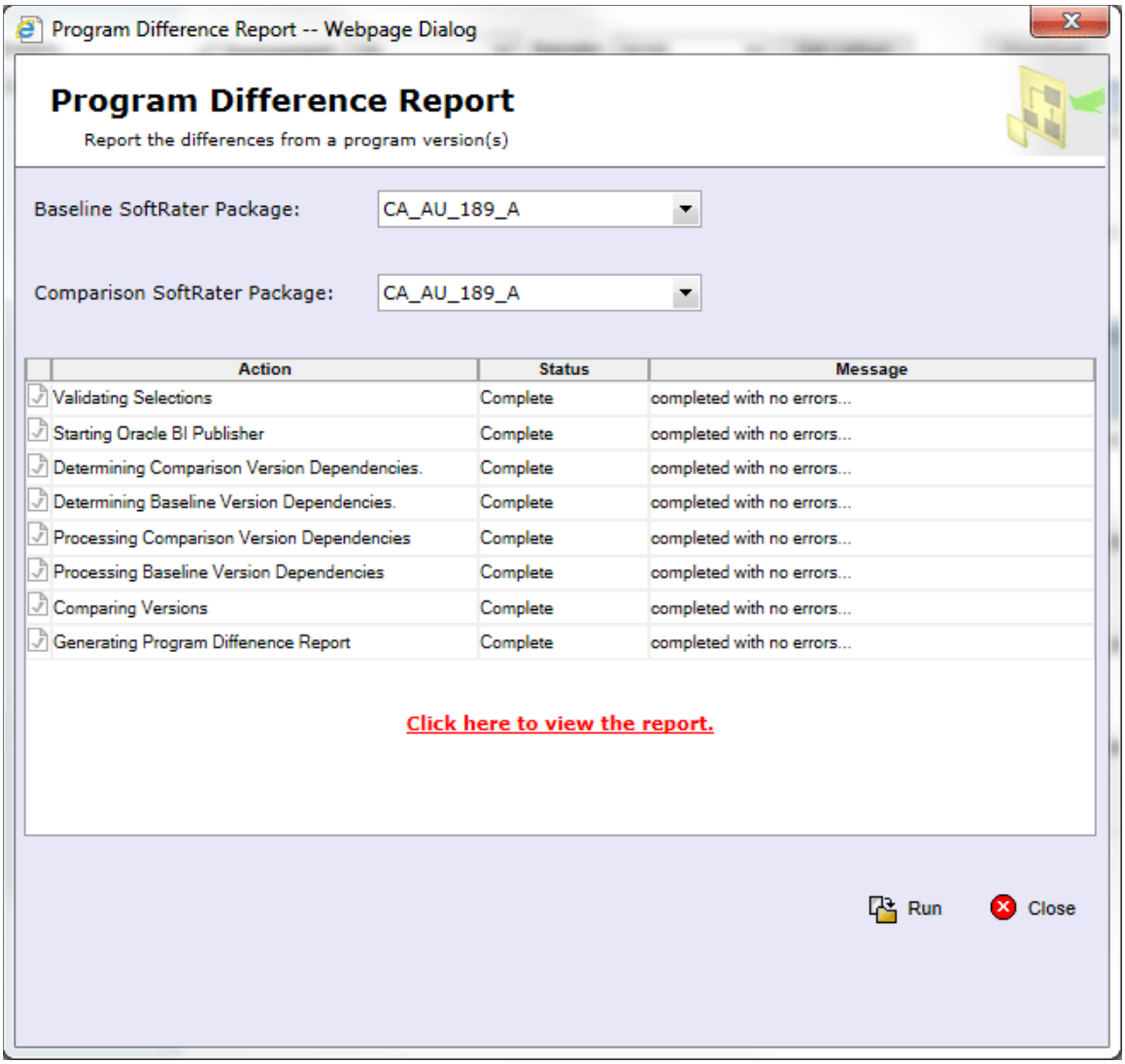


Figure 70 Completed Program Difference Report

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

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

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

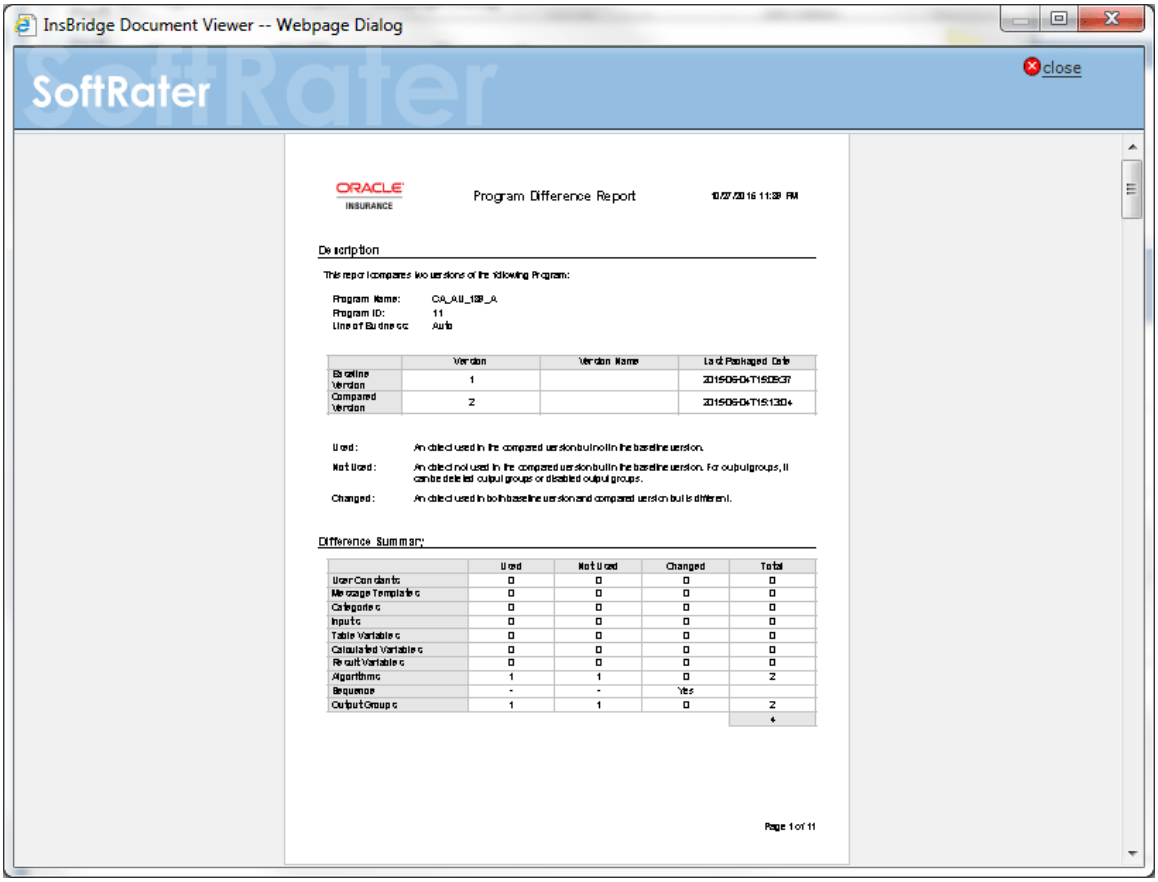


Figure 71 Program Difference Report

NOTE: *OBI Publisher must be installed and running in order for Package Difference Reports to be displayed. If you receive an OBI Publisher error, please see* OBI Publisher *on page 104.*

Viewing Package Details

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

To View Details about a Package

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

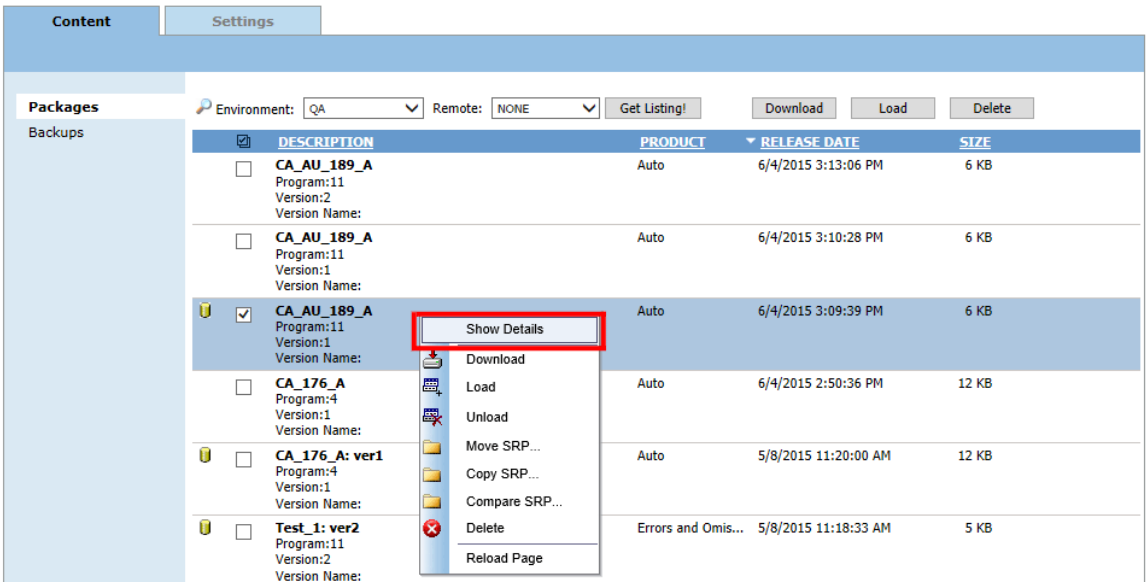


Figure 72 Selecting a Package to View Details

4. A bottom frame opens that has information about the package.

Details for Viewing

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

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

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

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

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

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

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

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

Release Details

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

1. Select the release where you want to view the listing of packages.

2. Right click and select Show Details.

3. The lower portion of the window will display the packages contained within the release along with package comments.

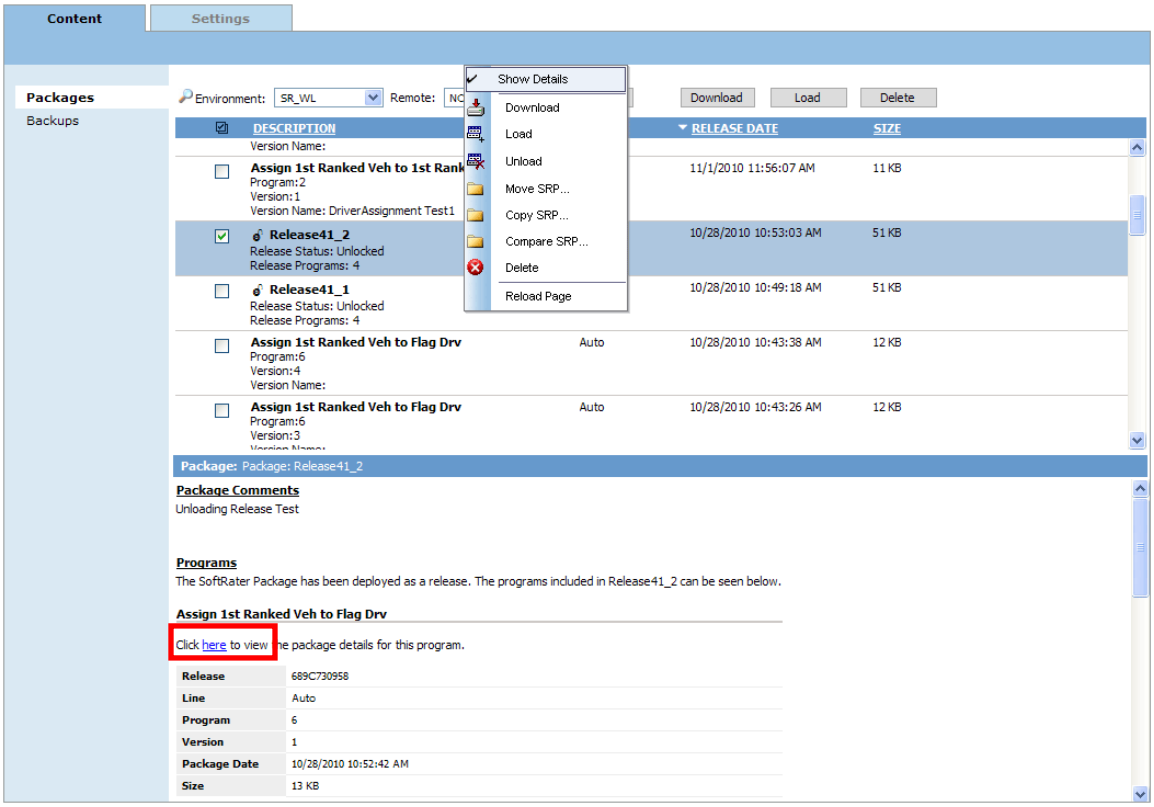


Figure 73 Release Details

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

Searching for Packages

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

To Search for a package

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

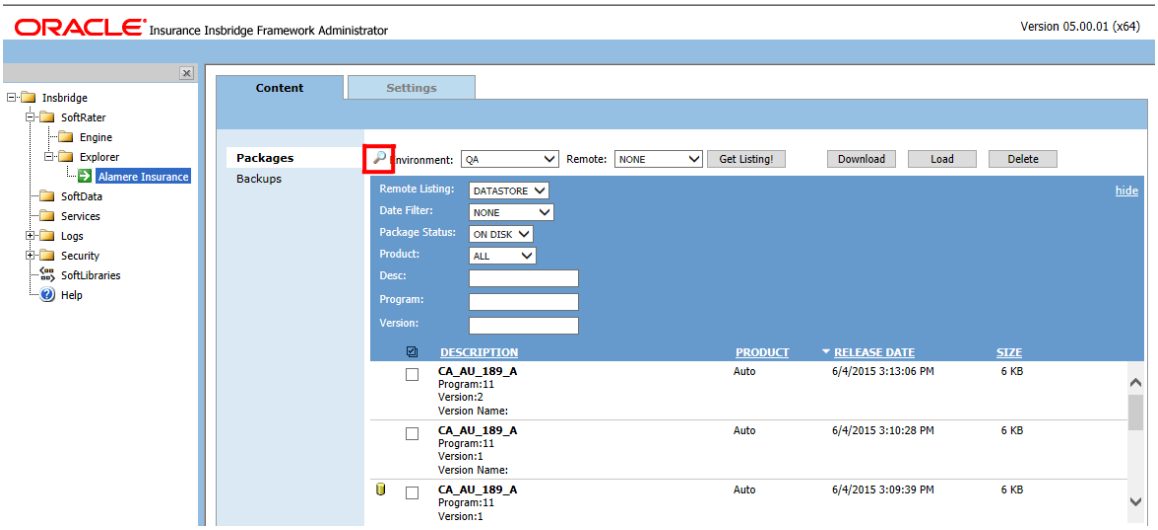


Figure 74 Searching for a Package

Search Options

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

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

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

- **None –** Does not apply a date filter.
- **Today** – Only shows packages that were created today.
- **This Week** – Only shows packages that were created this week.
- **This Month –** Only shows packages that were created during the current month.
- **Last Month –** Only shows packages that were created in the prior month.

- **Last Year –** Only shows packages that were created in the prior year.

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

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

Product: Allows you to filter the packages based on the product. Only products that have been set up through the configuration page will show in this listing. See Adding/Deleting a Product Management for more information.

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

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

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

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

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

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

BACKUPS

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

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

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

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

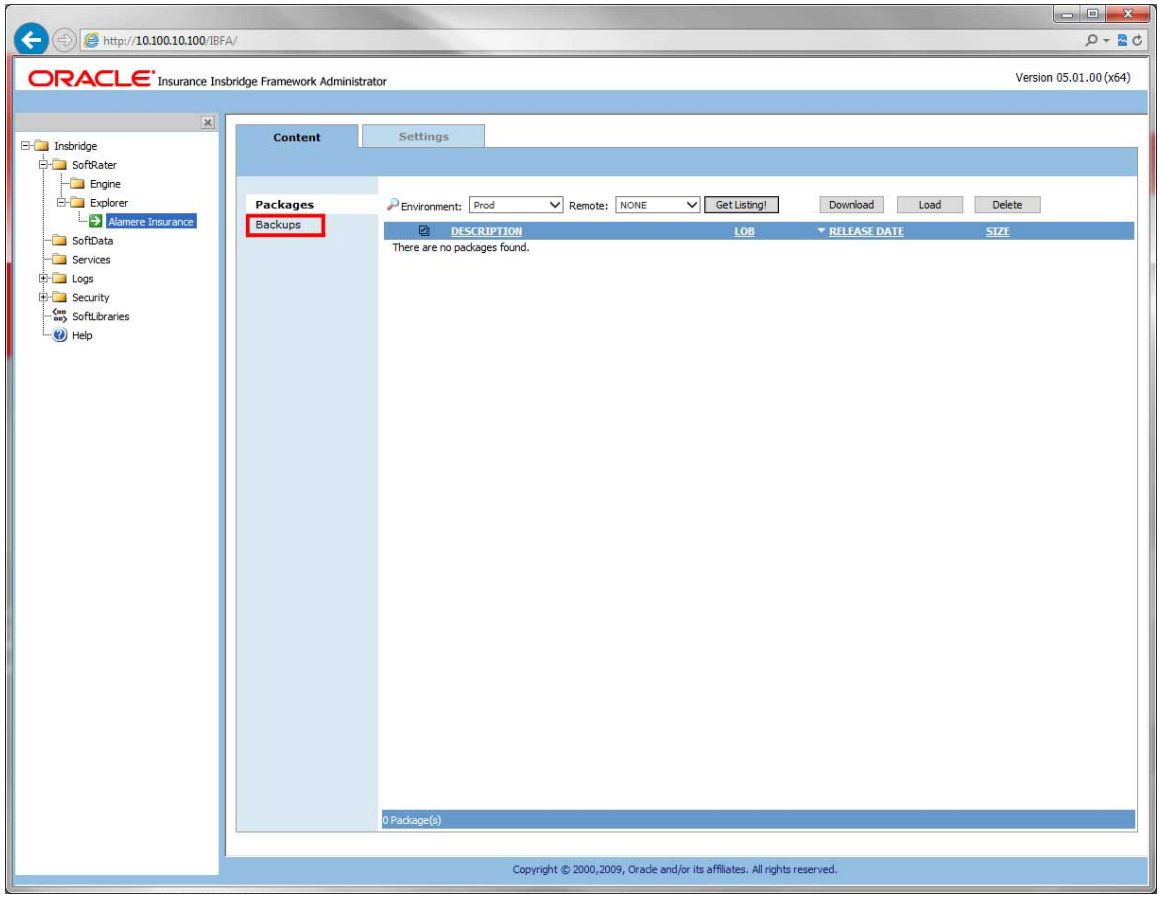


Figure 75 Backups

FUNCTIONALITY

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

Functions:

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

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

FIELDS

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

Backups Listing

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

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

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

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

Size: The size of the backup.

Right Click Options

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

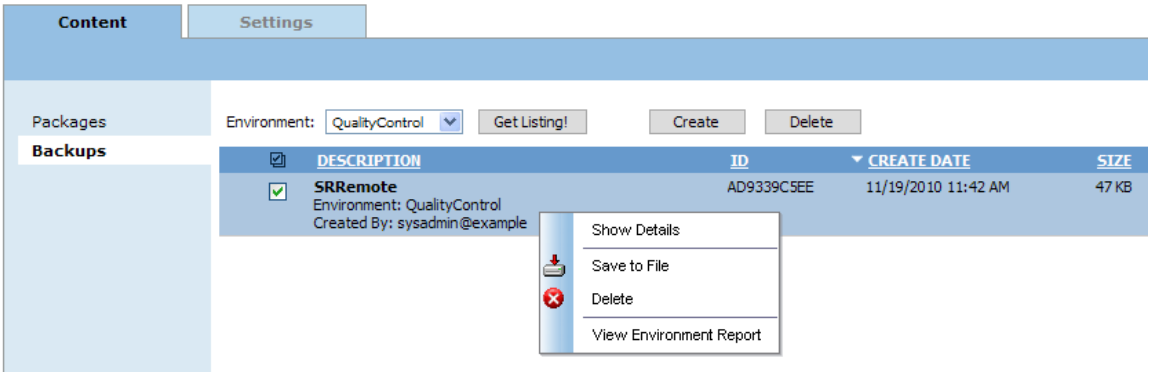


Figure 76 Right Click Menu for the Backups Subtab

Backups have four choices:

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

Processing Options

Saving to File and Deleting will have processing options:

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

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

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

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

Creating a Backup

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

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

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

Creating a Backup

1. Select the **Backups** subtab.

2. Select the **environment** where you want to create a backup and click **Get Listing!** The window will refresh. Any backups will be listed. If not backups are found, a message will be displayed.

3. Click **Create**. The create backup window is displayed.

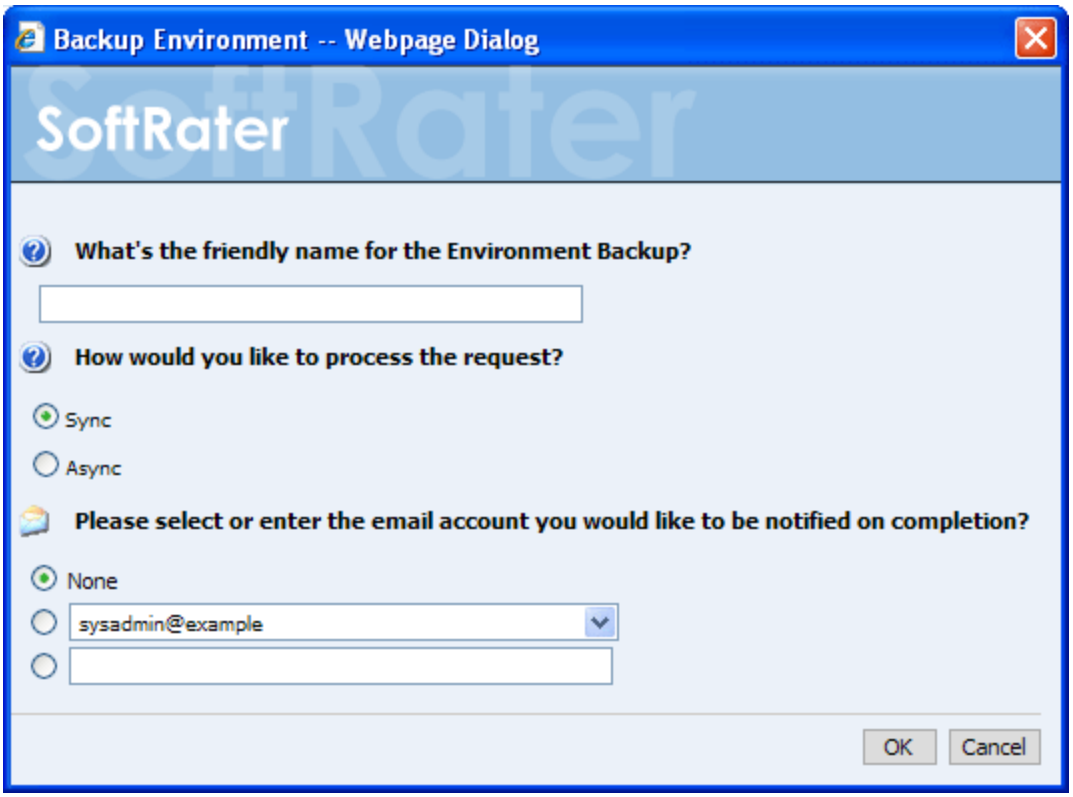


Figure 77 Creating a Backup

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

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

   - If you chose the Sync option, the backup will be performed immediately and the backup listing should refresh with the backup.

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

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

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

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

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

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

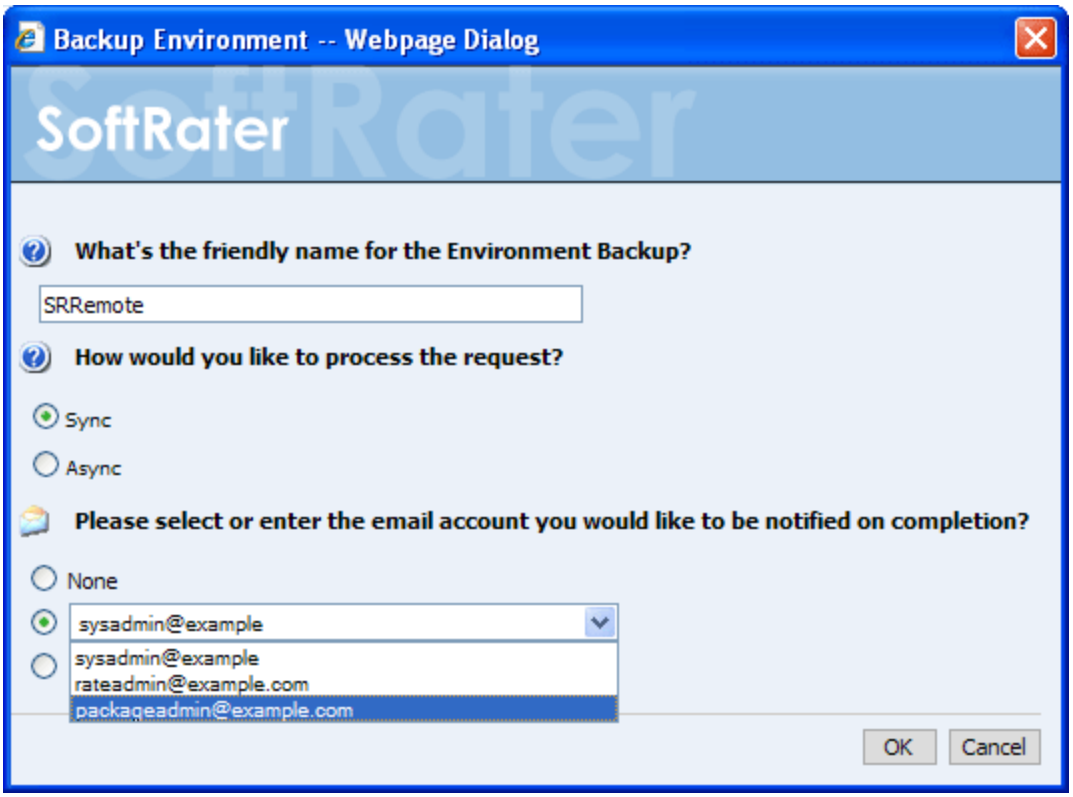


Figure 78 Selecting an Admin when Creating a Backup

7. Click OK. The request will process.

The process request will come up as successful or not.

Save to File

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

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

Creating a Backup Zip File

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

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

4. Select the **backup** you want to save and right click.

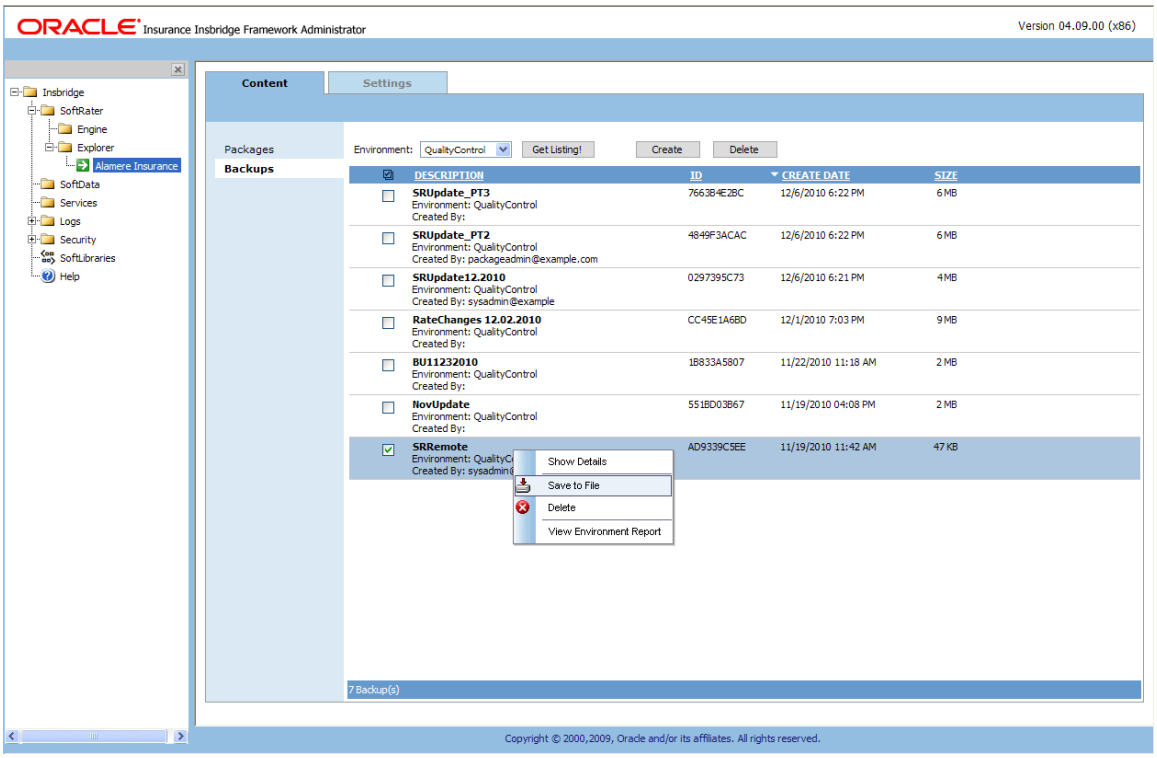


Figure 79 Save To File Select

5. Select **Save to File** from the menu. The File Download dialog is displayed.

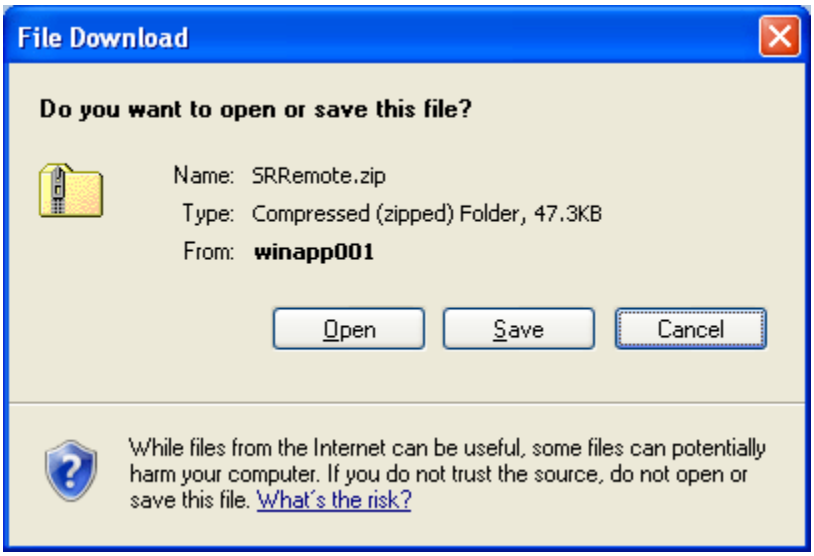


Figure 80 Creating a Backup Zip

6. Elect to **Save**. The Save As dialog box is displayed.

   Open: opens the zip file in a separate window.

Cancel: cancels the process, the dialog will close and no file will be created or saved.

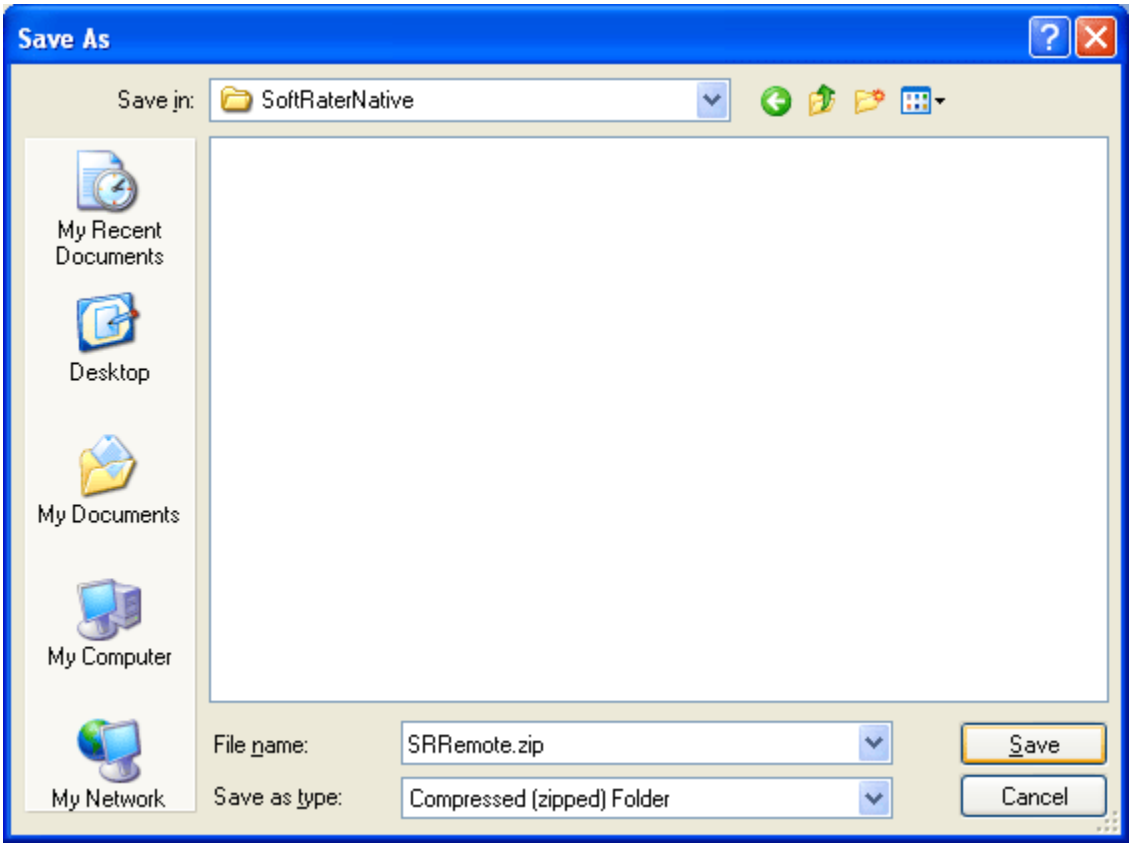


Figure 81 Saving a Backup Zip File

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

8. Click **Save**. This saves the file to your local hard drive or network.

Backup Zip File Contents

A database backup will contain:

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

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

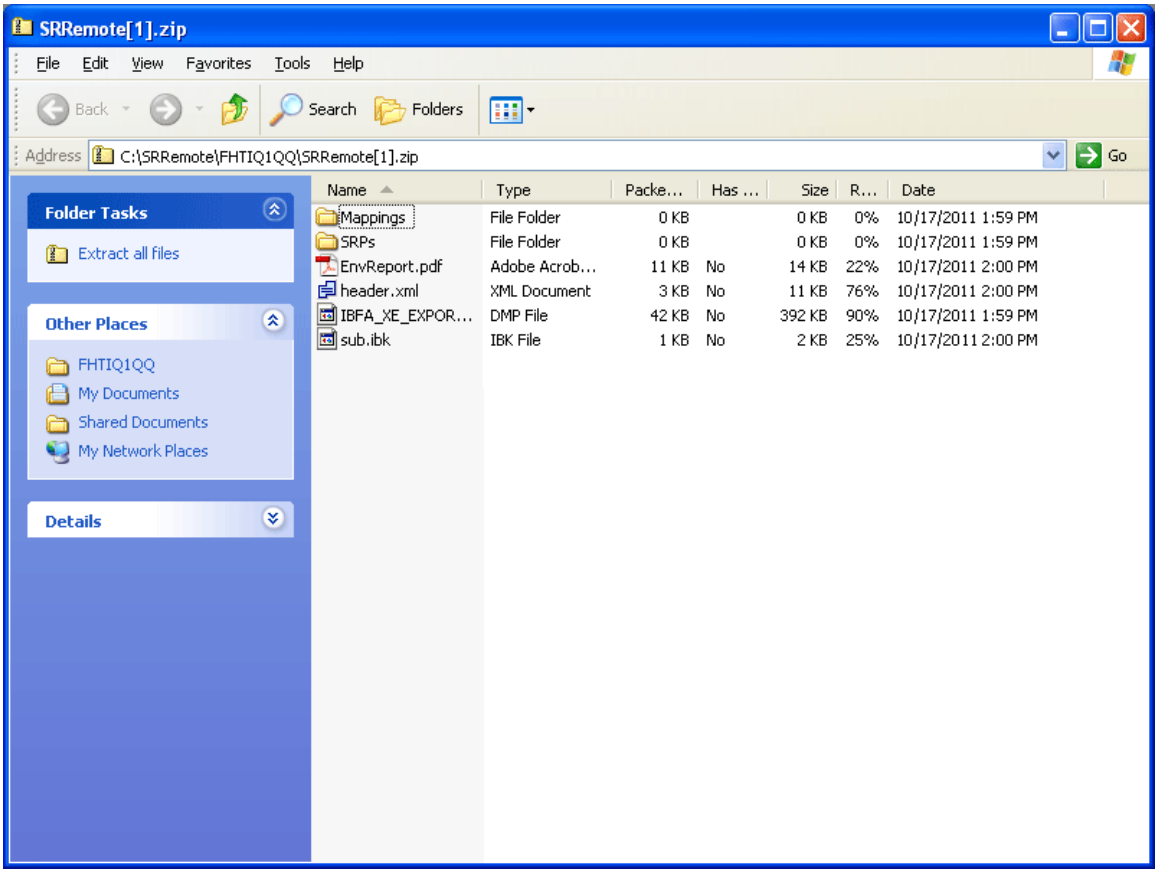


Figure 82 Backup File Contents

Delete Backups

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

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

Deleting a Backup

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

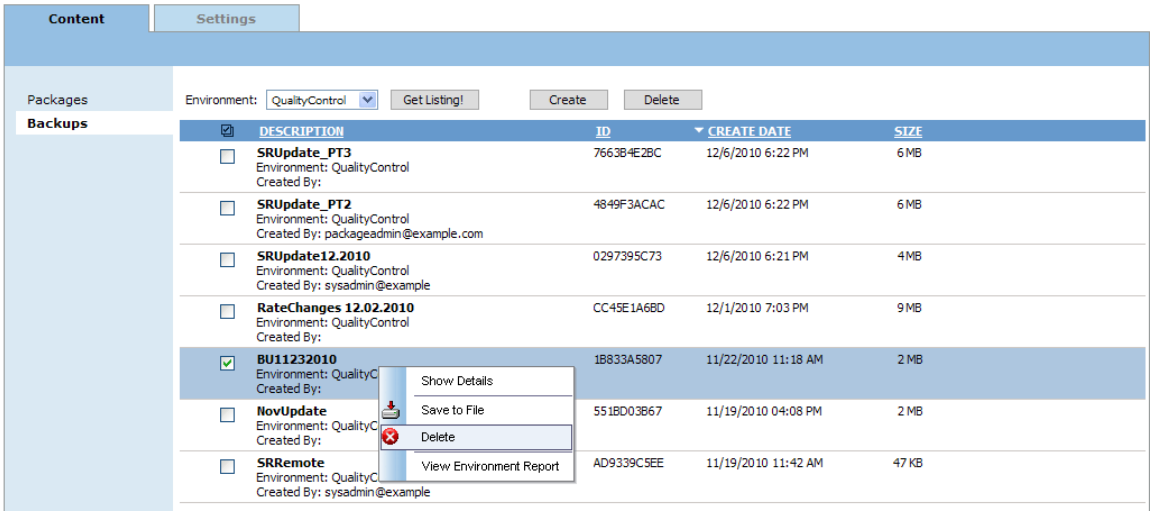


Figure 83 Selecting to Delete a Backup

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

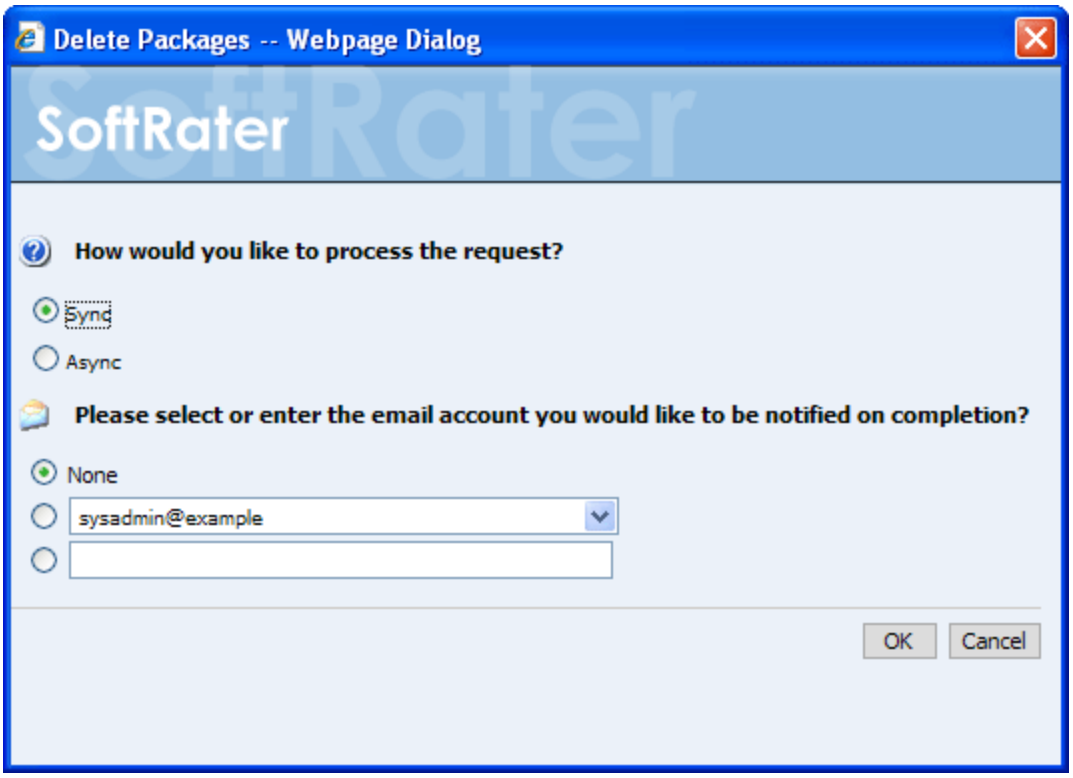


Figure 84 Deleting a Backup

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

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

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

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

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

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

7. Click OK. The request will process.

The process request will come up as successful or not.

Show Details

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

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

2. Select the **Backups** subtab.

3. Select the **environment** where you want to view a backup and click **GETLISTING!** The window will refresh. Any backups will be listed. If not backups are found, a message will be displayed.

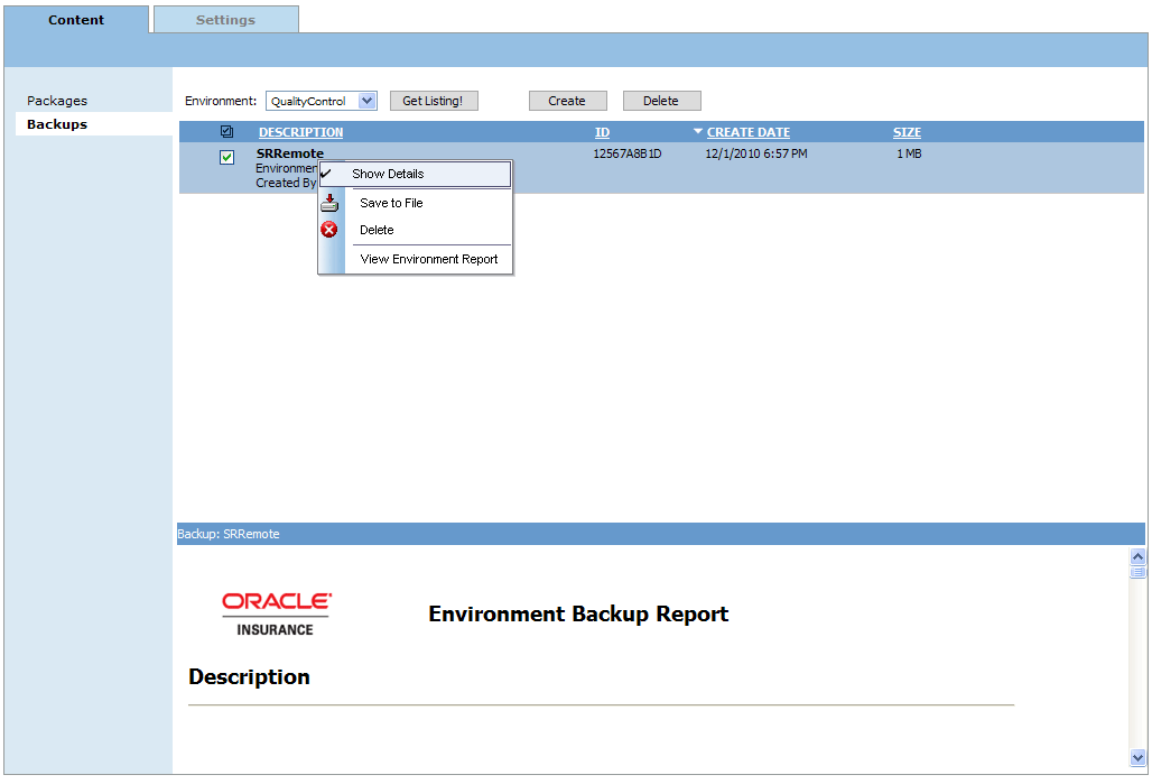


Figure 85 Show Details

4. Select the **backup** you want to save and right click.

5. Select **Show Details**. The window will refresh and the details of the backup will be displayed in the lower portion of the window.

View Environment Report

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

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

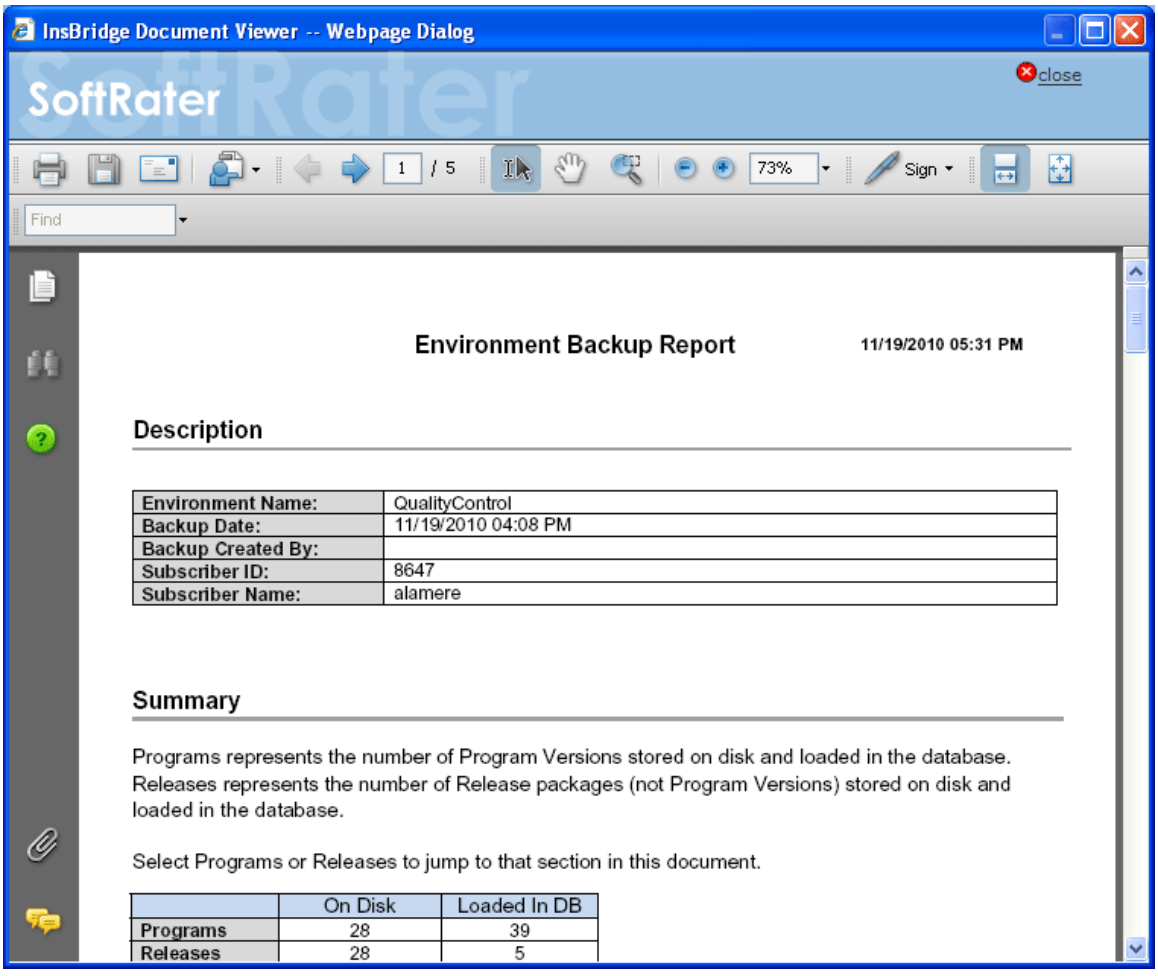


Figure 86 Environment Report

The report will be broken into:

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

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

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

Chapter 8

SOFTDATA TEST INTERFACE

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

To Test a File Using the SoftData Test Interface

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

2. This opens the **SoftData Test Interface** page.

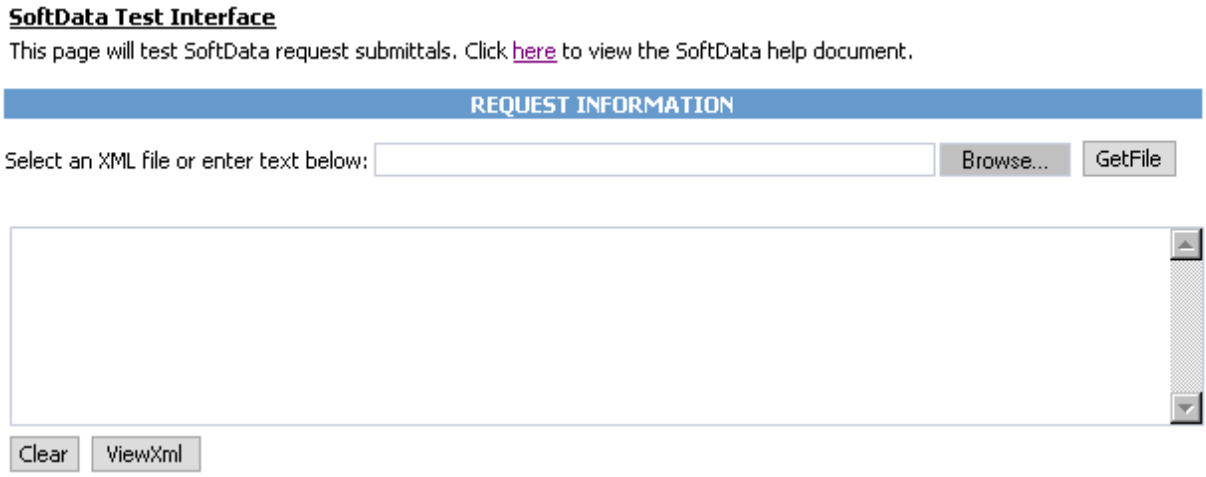


Figure 87 SoftData Test Interface

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

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

5. The file is submitted and the results are shown in the results box.

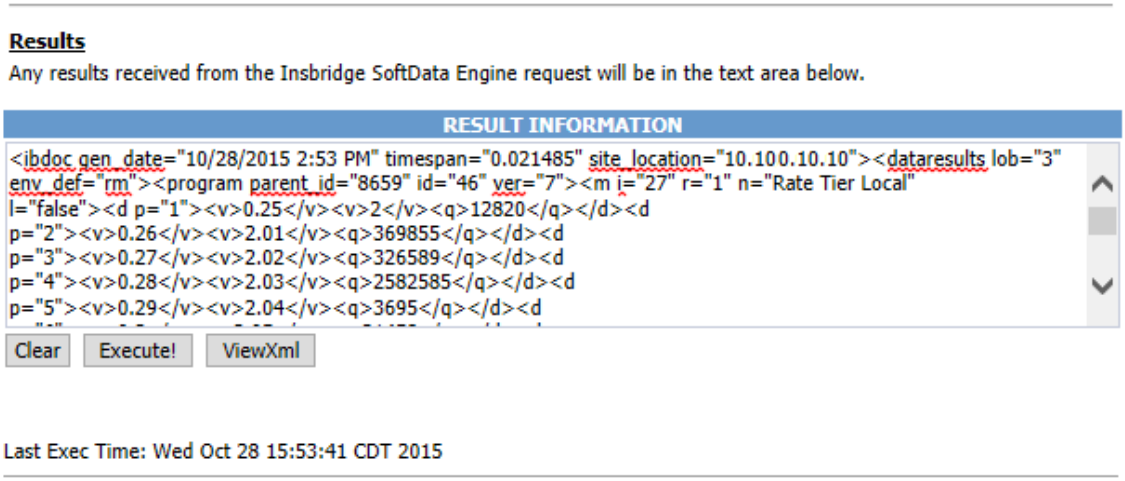


Figure 88 Test Results

6. To view the XML file in a separate screen, click **ViewXML**.

NOTE: *For SoftData format, please see the SoftData for Windows User Guide.*

Copy and Paste

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

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

Chapter 9

SERVICES

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

Navigating to the Services Page

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

2. This opens the **Services** page.

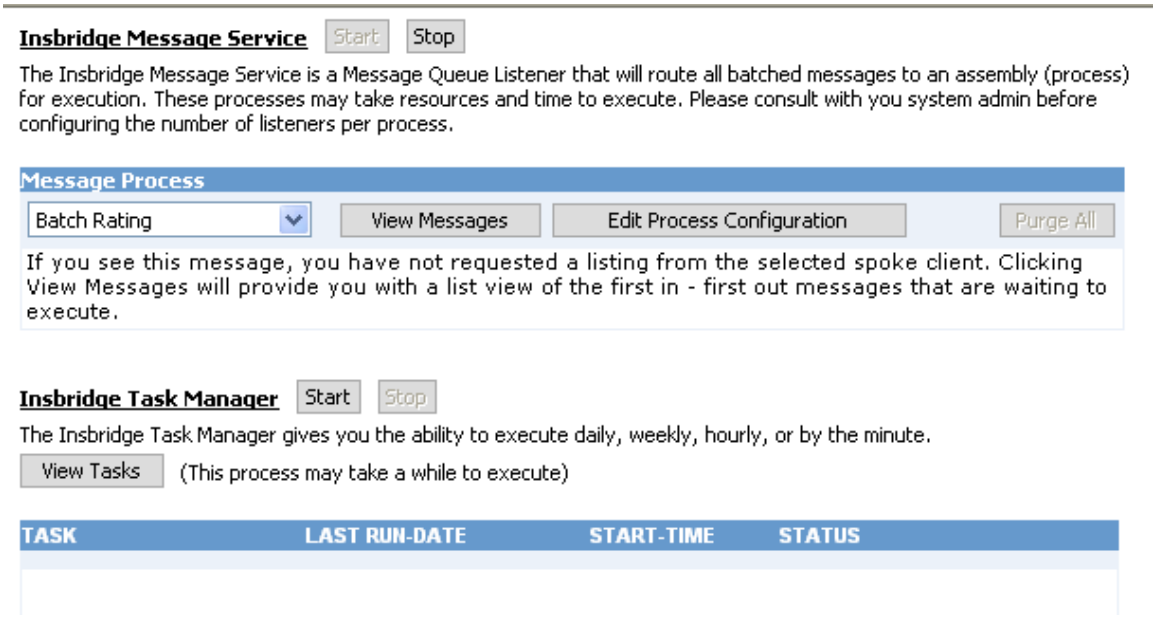


Figure 89 Insbridge Services Window

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

INSBRIDGE MESSAGE SERVICE

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

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

Starting & Stopping the Message Service

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

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

To Start or Stop the Message Service

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

Figure 90 Insbridge Services Window

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

OBI Publisher

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

- OBI Publisher was not installed or improperly installed. Please return to the installation folder and re-install OBI Publisher.
- The Insbridge message service has not been started. Please start the service and attempt to run the report again.
- The OBI Publisher Credentials are incorrect. This may happen when the OBI password is changed in one location but not in the other. The OBI password must be updated in OBI Publisher and on the SoftRater Explorer Configuration page in IBFA.
- The ports required by OBI Publisher are in use. This error could be caused by one or both ports required by OBI Publisher being used by another program. Ports 9704 and 23791 are both required by OBI Publisher. If you have a conflict with ports, please log a Service Request using My Oracle Support at https://support.oracle.com/.

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

Viewing Messages

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

To View Messages in the Queue

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

Figure 91 Insbridge Services Window

2. Select the appropriate client from the drop down.

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

3. Click View Messages.

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

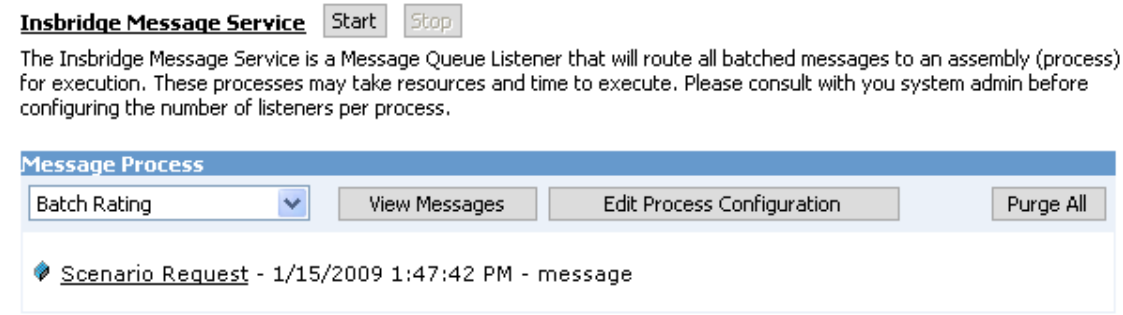


Figure 92 Insbridge Message Service

5. To view details on a specific message, click the underlined portion.

6. Information about the message opens in a separate window.

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

Deleting Messages

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

To Delete Messages from the Queue

This will delete all messages from the selected queue.

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

Figure 93 Insbridge Services Window

2. Select the appropriate client from the drop down.
    - Batch Rating
    - Batch Scenario
    - SoftRater - Package
    - Broker - Request
    - Broker - Response
    - Administration
3. Click **View Messages**.
4. The listing refreshes and shows any messages that are currently in the queue.
5. Click **Purge All**. All messages are deleted from the selected queue.

Threading

There are six thread settings in the Insbridge system:

- **Batch Packing Thread** – Found on the Preferences window of RateManager. This setting is the maximum number of threads to be used for RateManager Batch Packaging. Batch packaging is building of packages inside RateManager. This thread setting will not affect rating or any other process in IBFA.

- **Reporting Threads** – Found on the Preferences window of RateManager. This setting is the number of threads to be used for RateManager reporting. A higher thread setting may result in reports being returned faster. Performance times depend on machine capabilities and demands. A high thread number does not necessarily warrant a faster performance. You should analyze how much data you need to process and the capabilities of your server to get to an optimal number.

- **Global Versioning Report Threads** – Found on the Preferences window of RateManager. This setting is the number of thread to be used for RateManager global versioning reports. A higher thread setting may result in reports being returned faster. Performance times depend on machine capabilities and demands. A high thread number does not necessarily warrant a faster performance. You should analyze how much data you need to process and the capabilities of your server to get to an optimal number.

- **Web Rate Threads** – Found on the SoftRater Engine screen in IBFA. This setting is the maximum number of threads to be used for rating that is sent through the SoftRater web services. If you want responses to be returned in the order submitted, this thread setting must be higher than the maximum number of rate requests contained within a single XML request.

- **Packaging (Table Variable) Threads** – Found on the SoftRater Engine screen in IBFA. The IBFA system administrator can set the maximum number of threads to be used when loading tables from a SoftRater package. This allows the system to process more than one table at a time. It is recommended that the setting be no higher than two threads per core.

- **IBFA Message Services Threads** – Found on the Message Services screen in IBFA. Individual thread usage can be set for Batch Rating, Batch Scenario and SoftRater-Package.

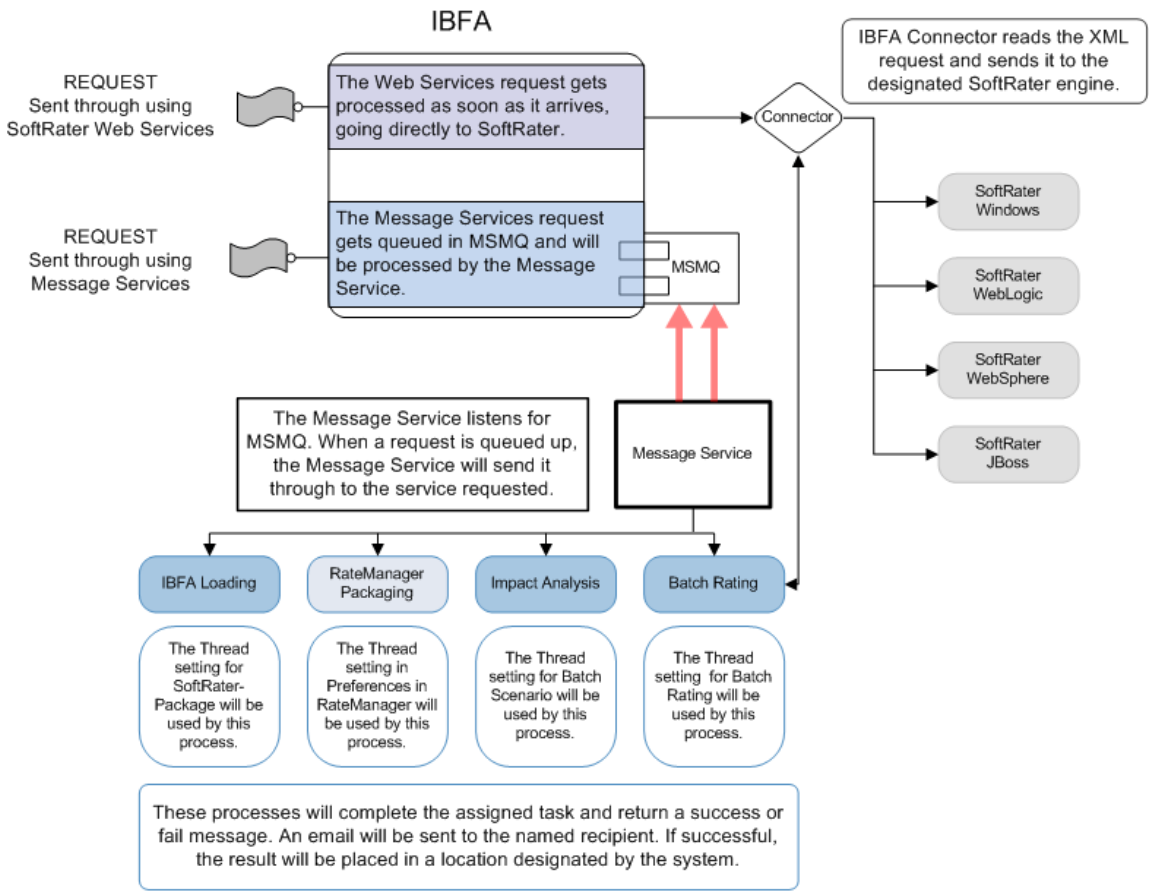


Figure 94 Threading in Insbridge

Process Configuration

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

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

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

It is recommended that the setting be no higher than two threads per core.

Editing the Process Configuration for a Client

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

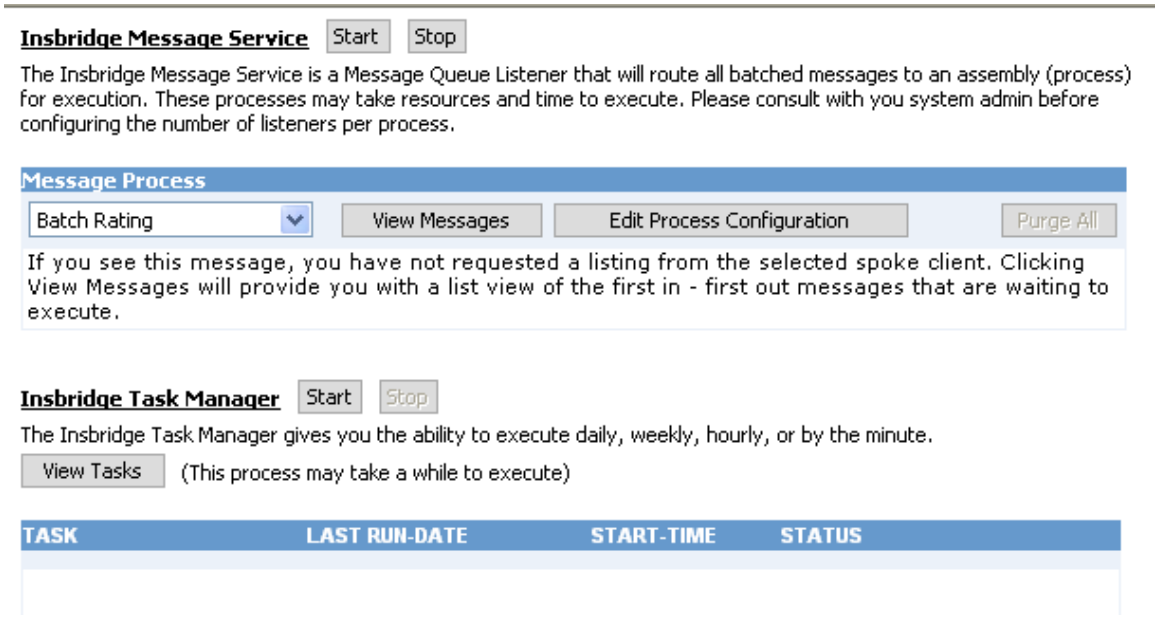


Figure 95 Insbridge Services Window

2. Select the appropriate client from the drop down.
    - Batch Rating
    - Batch Scenario
    - SoftRater - Package
3. Click **Edit Process Configuration**.
4. This opens the **Process Configuration** window for the selected client.

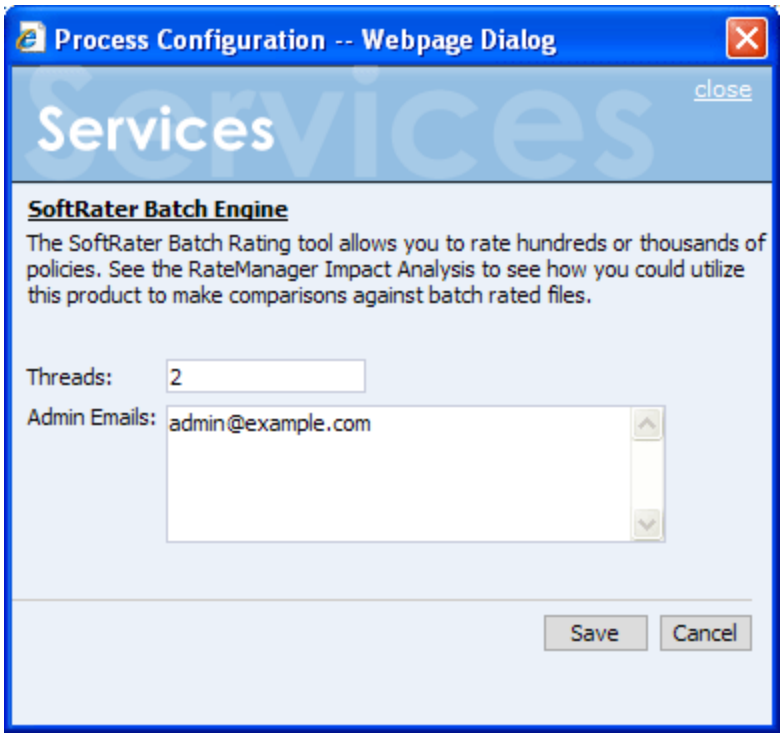


Figure 96 Process Configuration Window

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

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

Introduction to Insbridge Task Manager

The Insbridge Task Manager is a task queue that lists the tasks that are scheduled to be performed as well as the last time the task was run and the status. Tasks listed here are system tasks and generally are not changed or altered once in place.

Currently there is no capability to create, configure, or edit tasks from the IBFA. Please contact Insbridge Support for more information.

Currently, Task Manager has one task called Project Temp File Cleanup. This task deletes temporary files, such as PDF's, on a periodic basis.

It is recommended that the customer start the Insbridge Task Manager and Insbridge Message Service after IBFA installation and configuration is complete.

Starting & Stopping Task Manager

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

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

Figure 97 Insbridge Task Manager

Viewing Task Details

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

Chapter 10

LOGS

Logs are records of selected events or activities that happen in IBFA. These are separated into two types.

- **Event Log Events** are triggered when an Insbridge application either fails to do what has been requested or successfully completes an operation.
- **Audit Log Activities** are triggered when there is SoftRater package activity.

Error Log

The Error Log allows you to view errors encountered while using RateManager. It also allows you to view errors generated by an Insbridge application.

To Navigate to the Error Log

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

2. This opens the **Error Log**.
3. From here, you can view **Event Log Events**.

Event Log Events

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

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

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

To View the Event Log

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

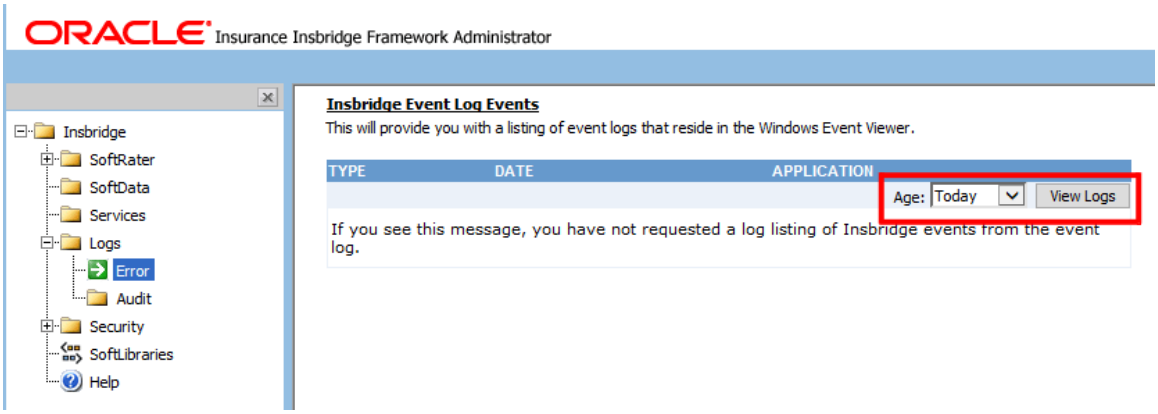


Figure 98 Insbridge Error Log

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

3. The event log updates to show the events you requested.

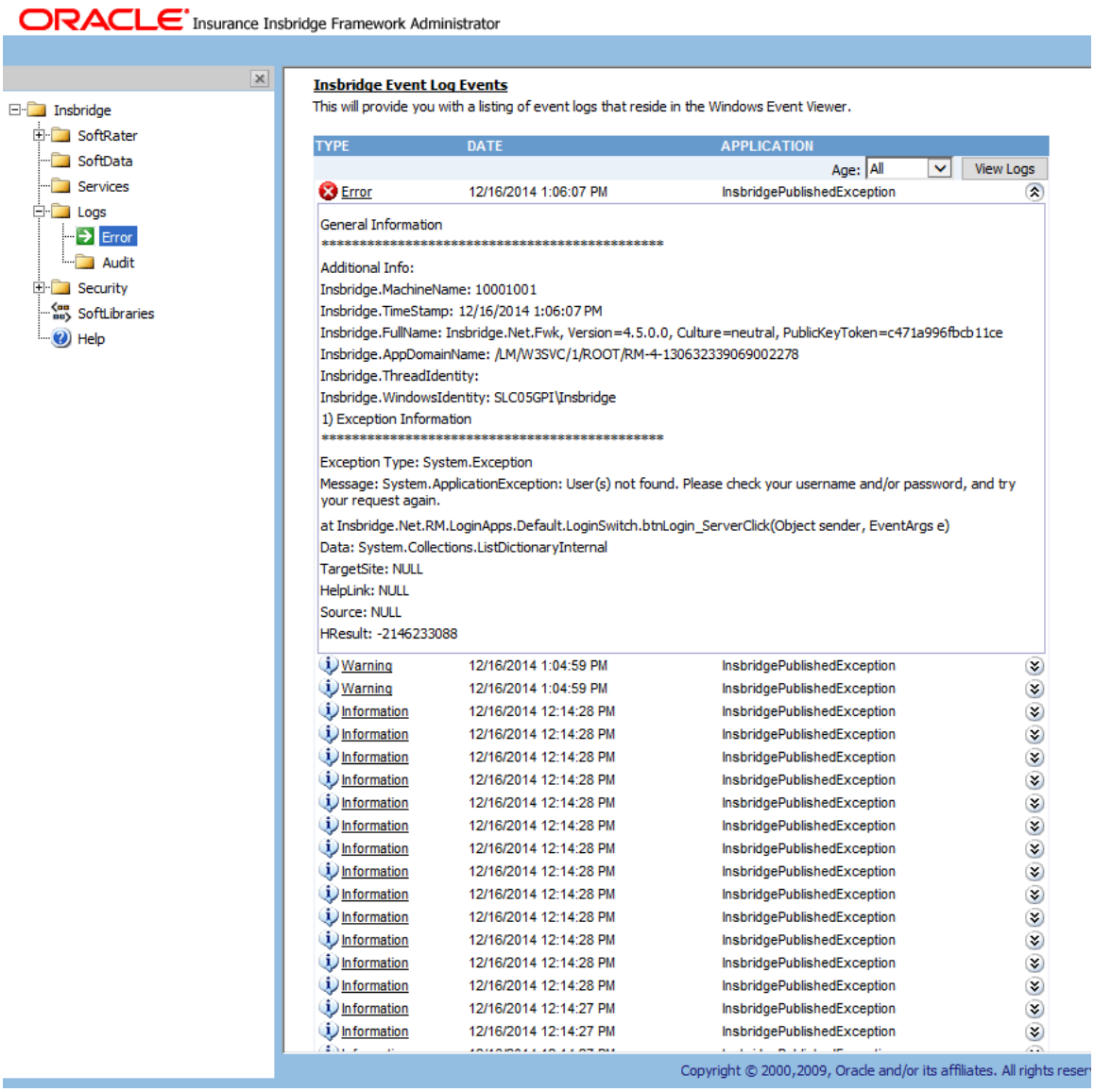


Figure 99 Insbridge Event Log Event

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

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

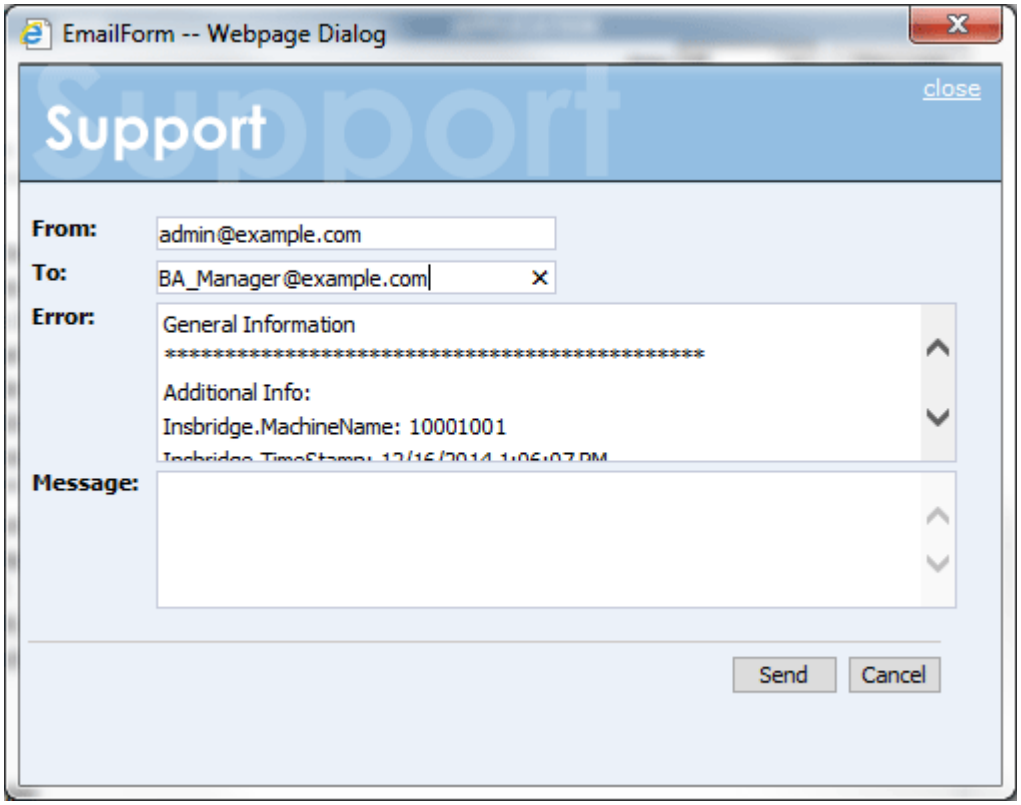


Figure 100 Emailing an Event

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

Audit Log

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

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

Viewing the Audit Log

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

2. This opens the **Audit Log**.

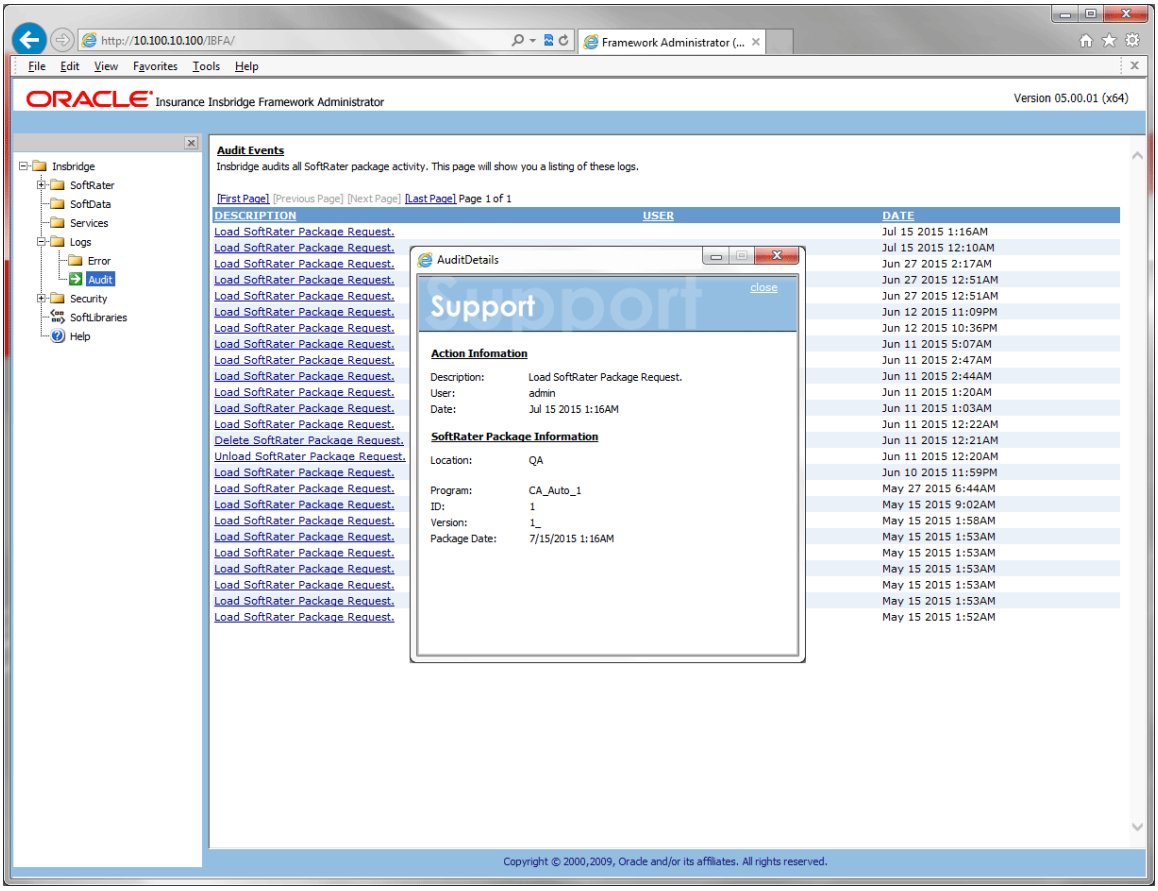


Figure 101 Audit Log

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

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

Chapter 11

SECURITY

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

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

Changing the Type of Authentication Used

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

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

Authentication is reset when updates are made to the Insbridge system. If you have enabled Windows or custom authentication, you need to reset these options after running a system update, i.e. going from release 4.5 to release 4.8.

To Change the Type of Authentication

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

2. This opens the **Security** page. Security is in the upper portion of the window.

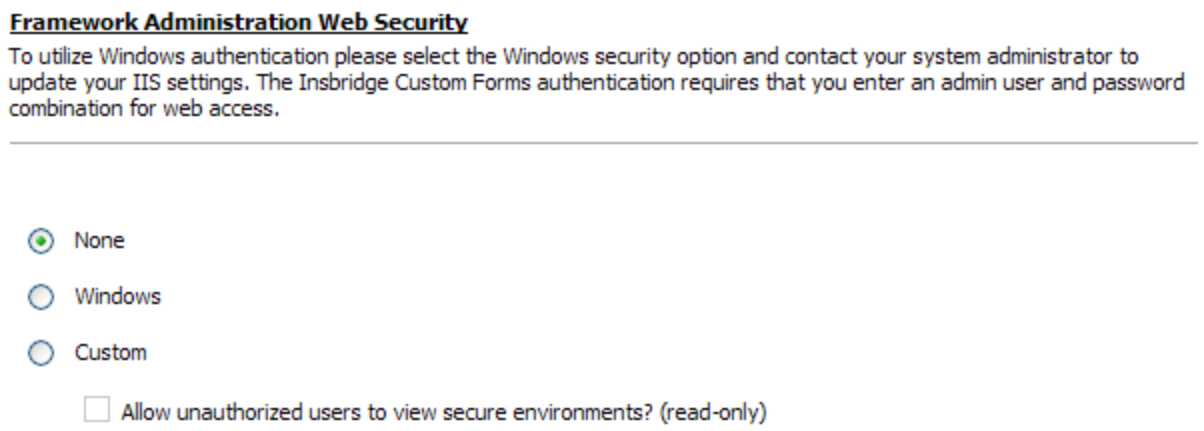


Figure 102 Insbridge Security Page

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

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

Windows Authentication

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

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

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

If you select to use Windows authentication:

1. Go to IIS and disable anonymous access for IBFA.

2. Turn Windows authentication on.

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

Custom Authentication

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

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

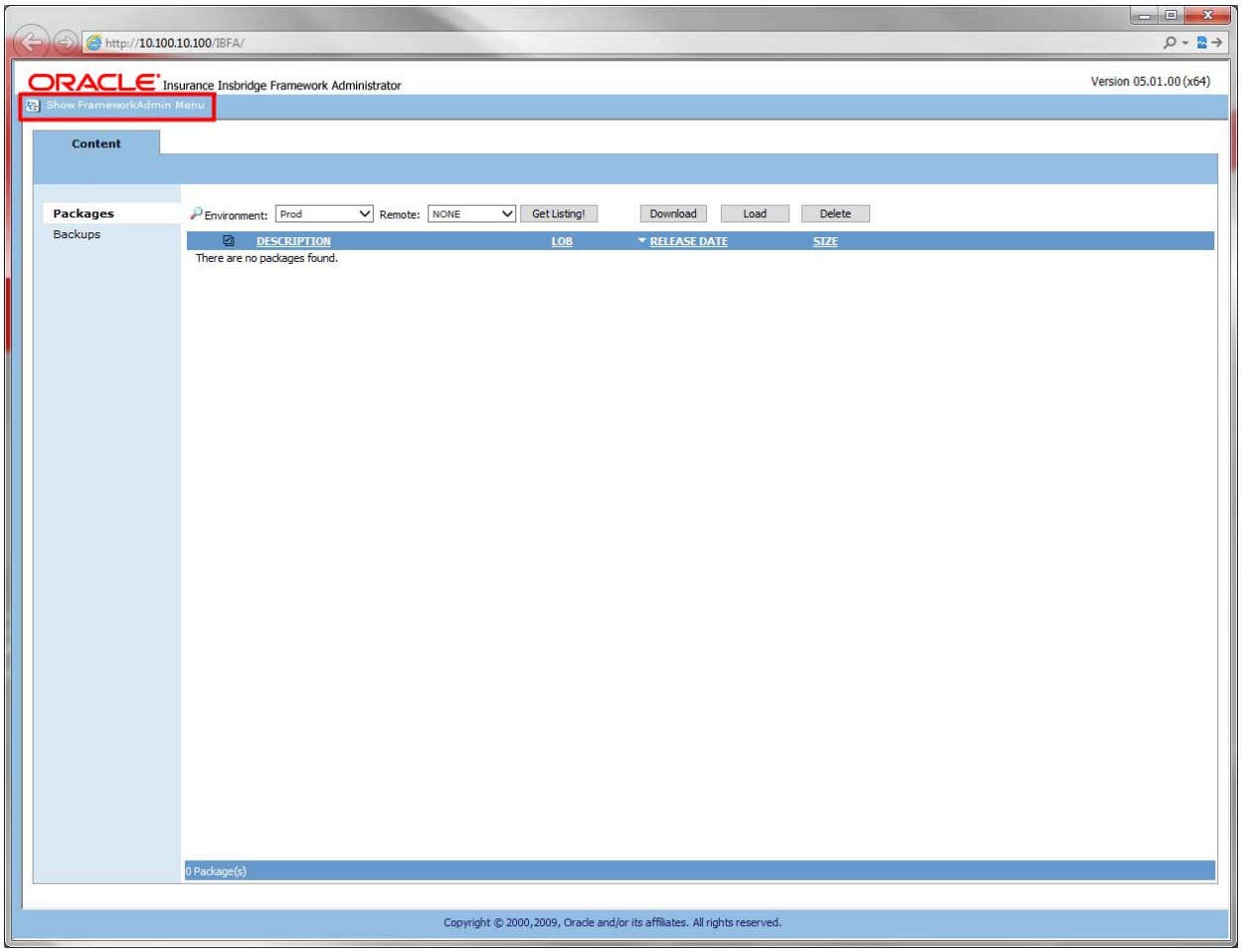


Figure 103 Required Login Information

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

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

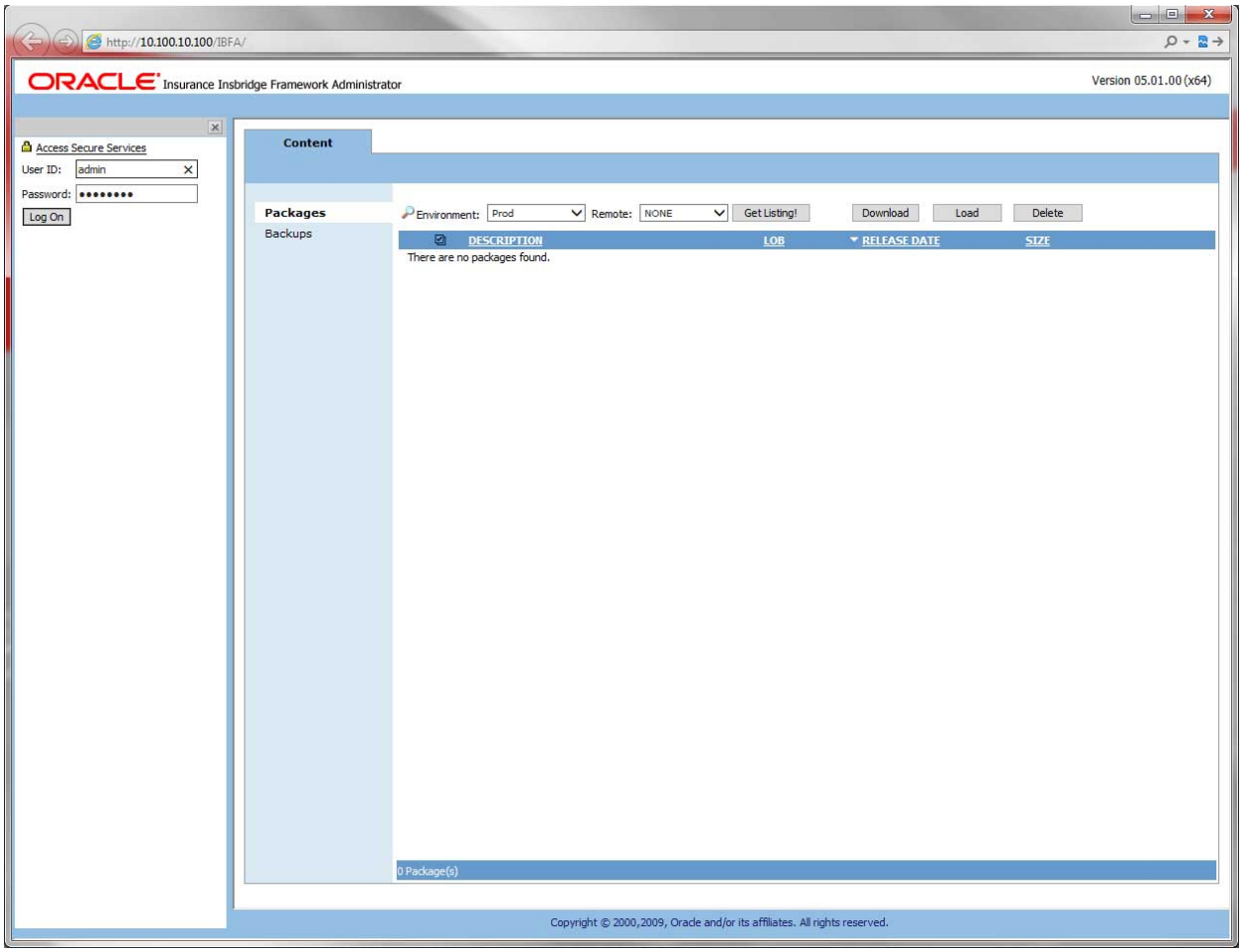


Figure 104 Logging into Framework Administrator

User ID, Default Password, Resetting the Password

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

External API Access

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

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

side. The information is processed and results returned from the ESI web service back to the custom built interface into the client's source policy or business admin system.

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

- Oracle Insurance Insbridge RateManager Interface
- Oracle Insurance Framework Administrator Interface

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

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

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

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

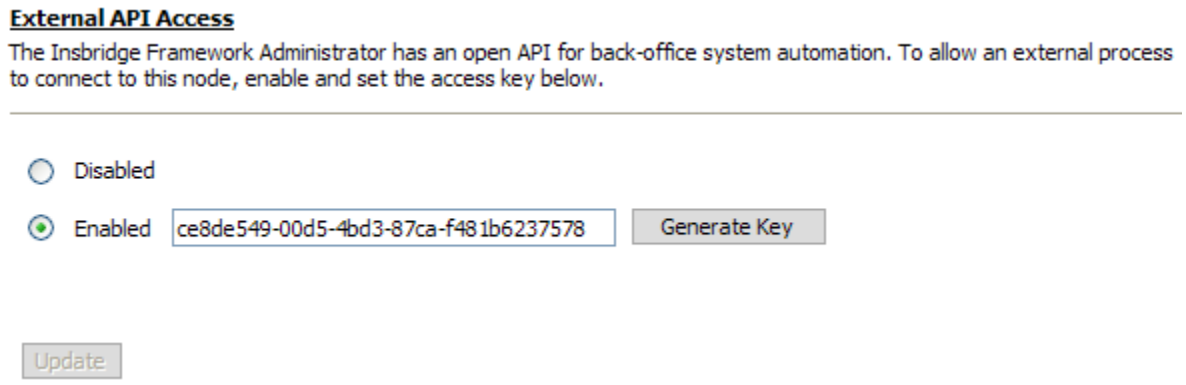


Figure 105 Allowing External API Access

Changing the Password

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

To Change the Password

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

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

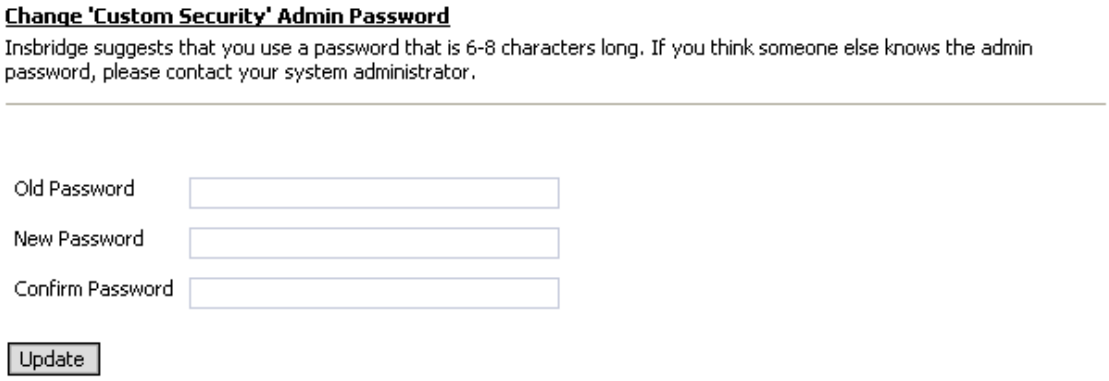


Figure 106 Changing your Password

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

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

Chapter 12

SOFTLIBRARIES

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

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

SoftLibraries are an advanced topic. This chapter defines the window features and the functionality. Developing the code that is called is not discussed here.

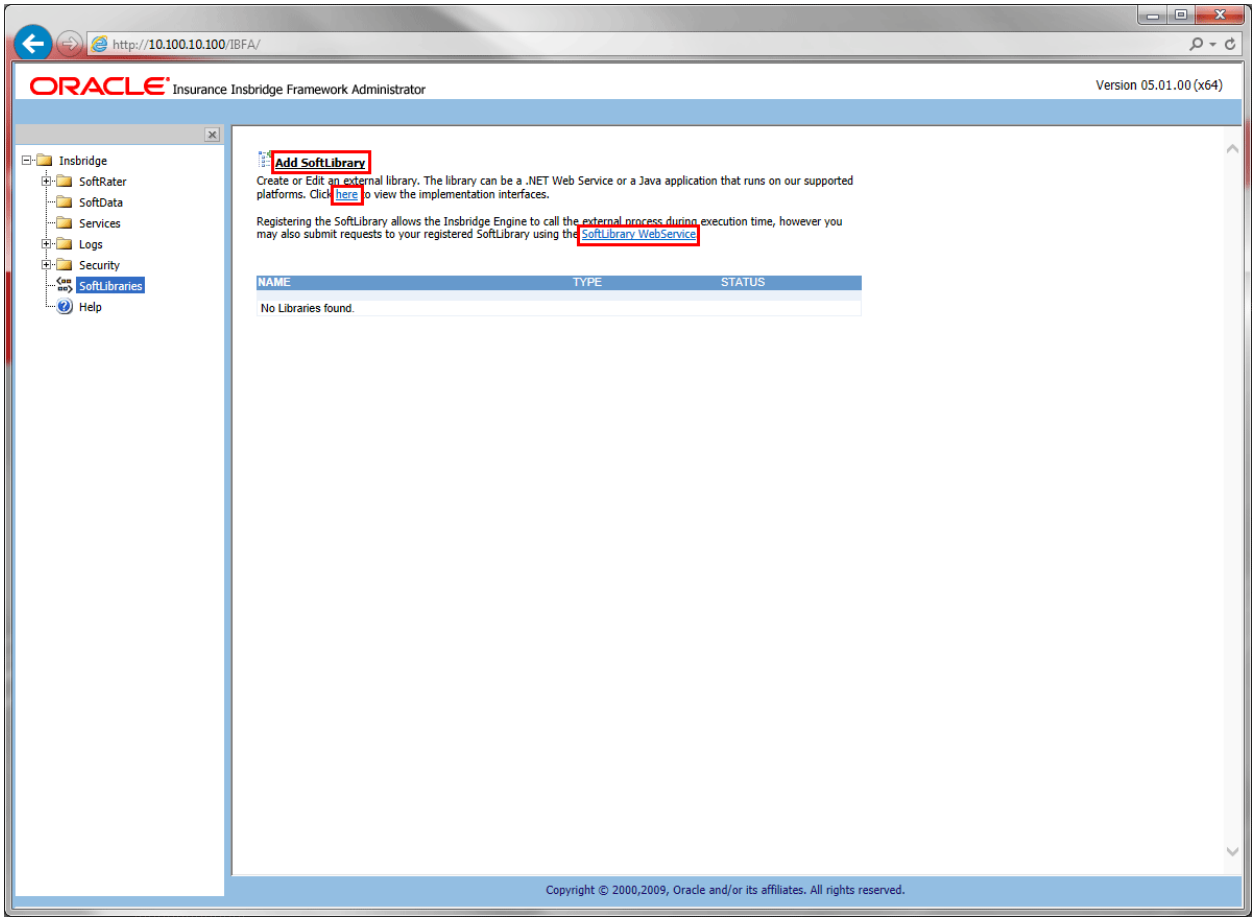


Figure 107 SoftLibrary Main Page

The main SoftLibraries page lists any entered SoftLibraries. Other information includes:

Name: The name of the SoftLibrary.

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

Status: The status, either active or disabled.

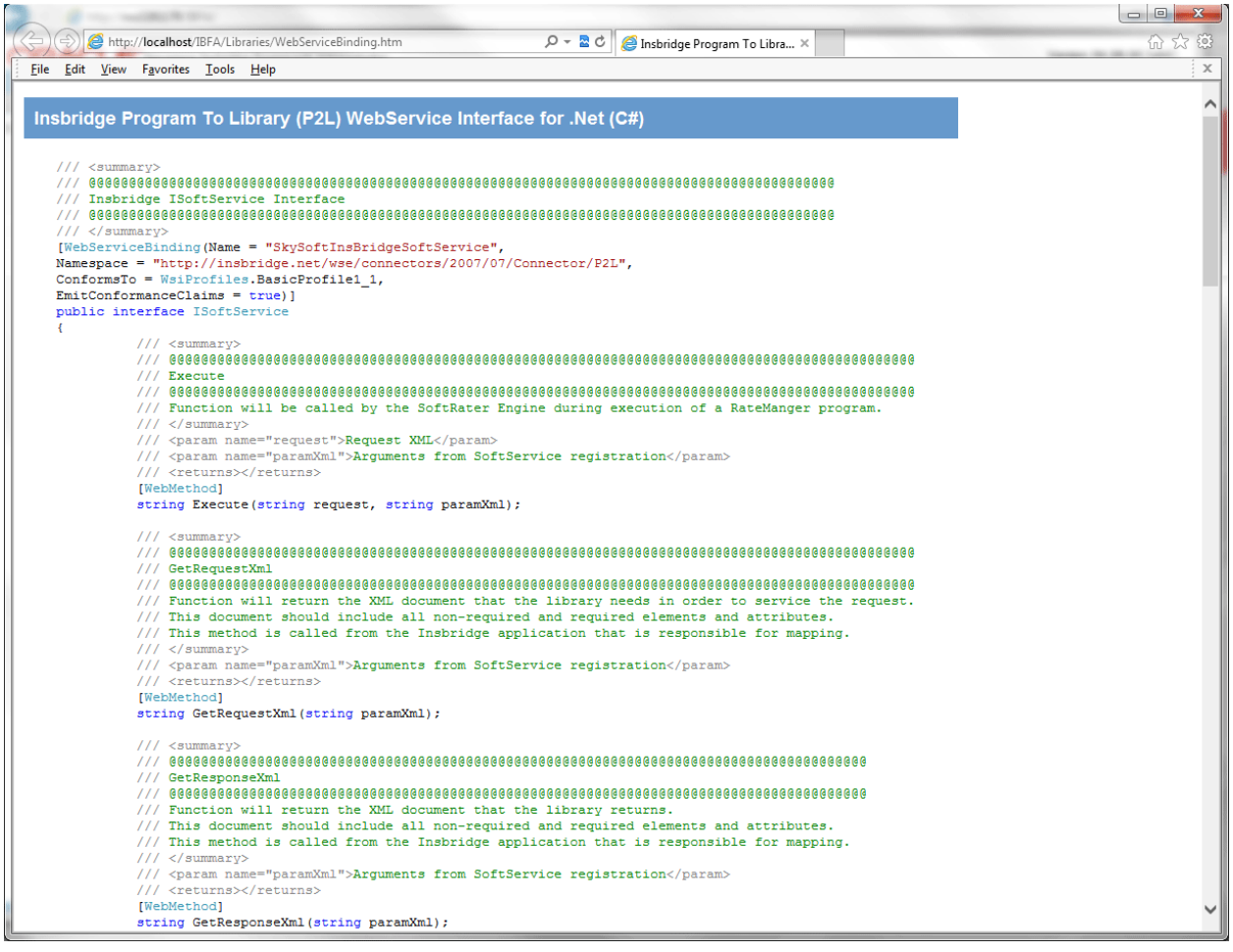
NOTE: *The status determines whether or not a SoftLibrary is displayed in RateManager. If a SoftLibrary is disabled, it will not be displayed. If a SoftLibrary is active, it will be displayed.*

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

Add SoftLibrary: This link places you on the new SoftLibrary window.

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

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


http://localhost/IBFA/Libraries/WebServiceBinding.htm
Insbridge Program To Libra...
File Edit View Favorites Tools Help
Insbridge Program To Library (P2L) WebService Interface for .Net (C#)
/// <summary>
/// @@@@

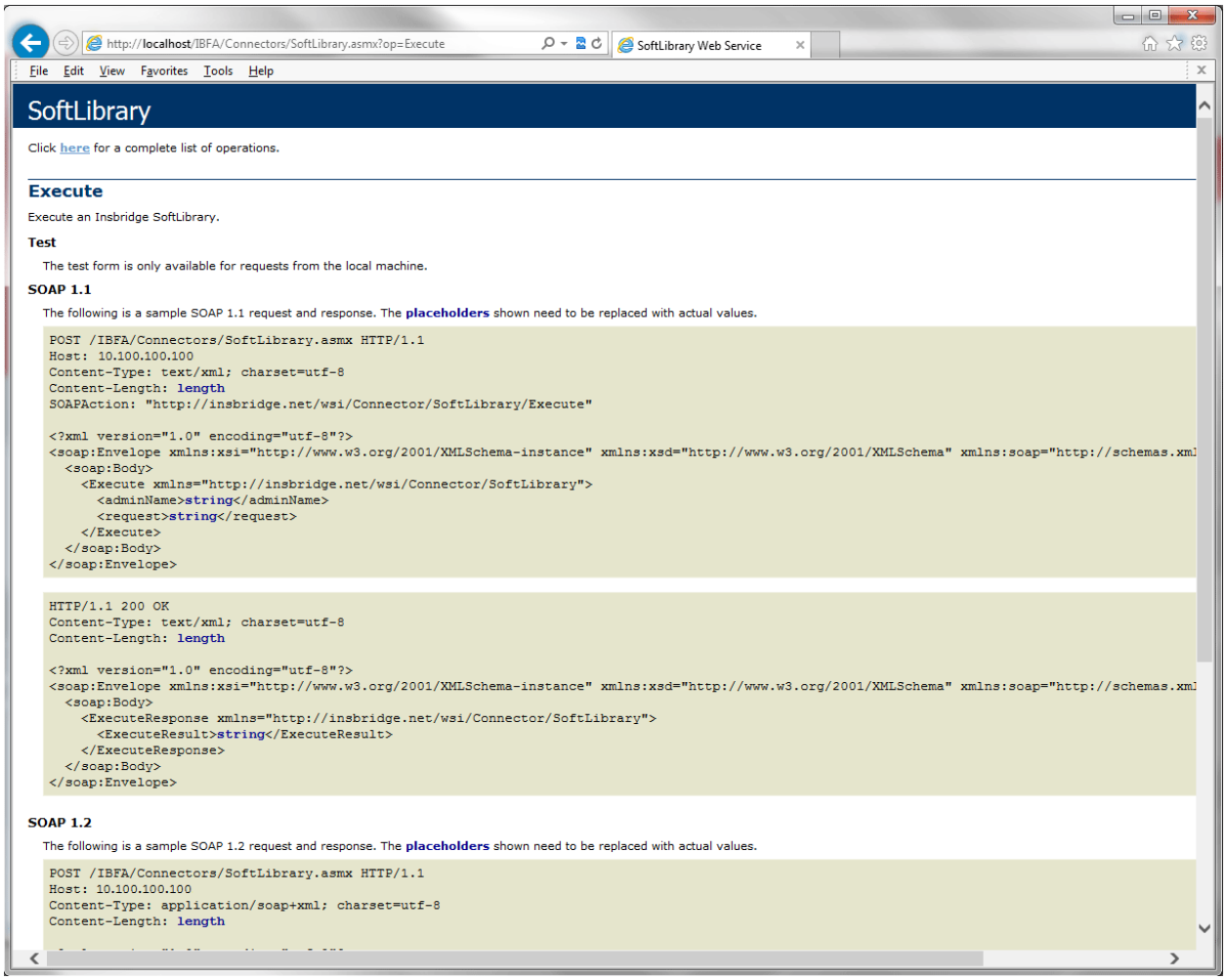


Figure 109 SoftLibrary Web Services

ADDING SOFTLIBRARIES

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

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

Adding a Windows library

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

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

Adding a Java class library

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

Adding to IBFA

1. Click the **Add SoftLibrary link** at the top of the window. A separate window is displayed.

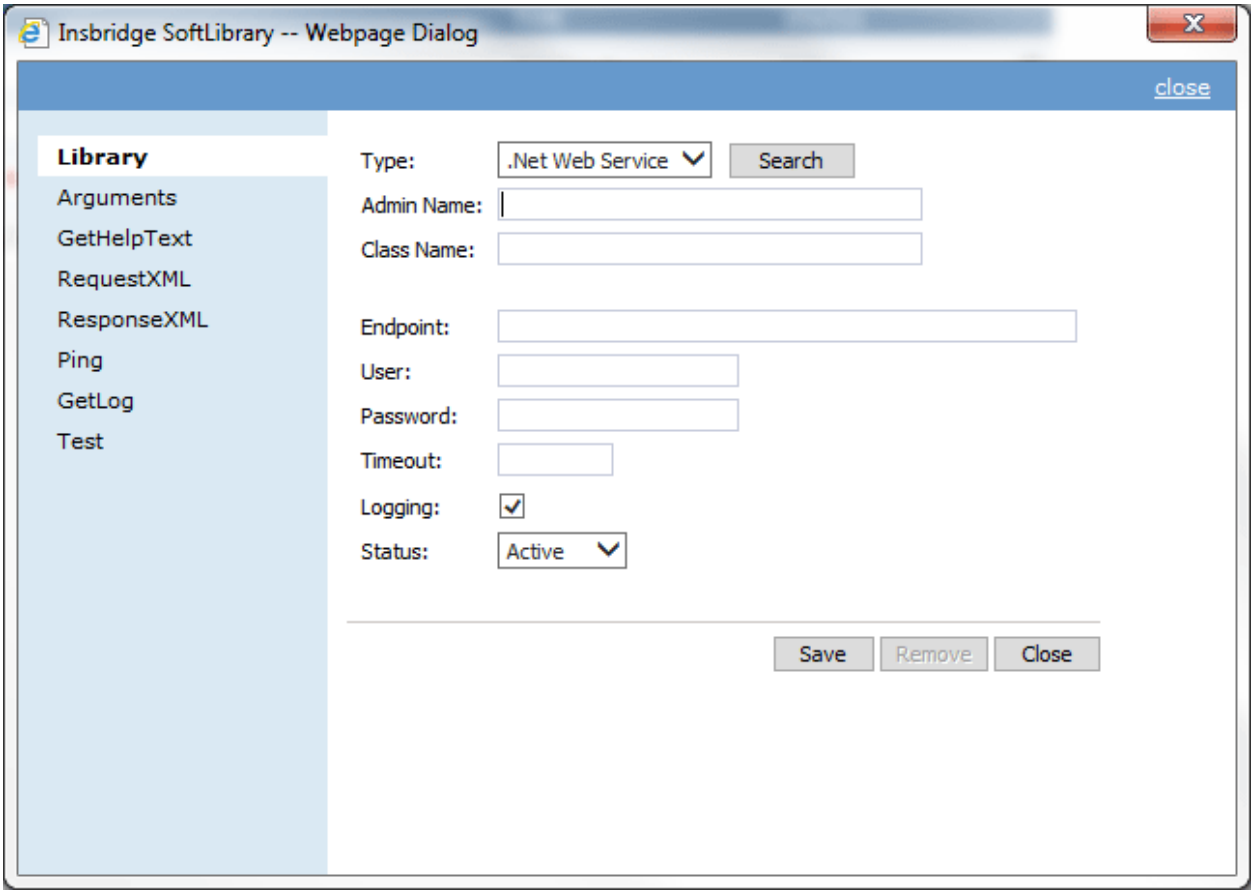


Figure 110 SoftLibrary Window

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

Library: The basic SoftLibrary information is entered here.

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

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

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

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

Ping: Will ping the server to verify server response.

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

Test: Allows you to test the SoftLibrary.

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

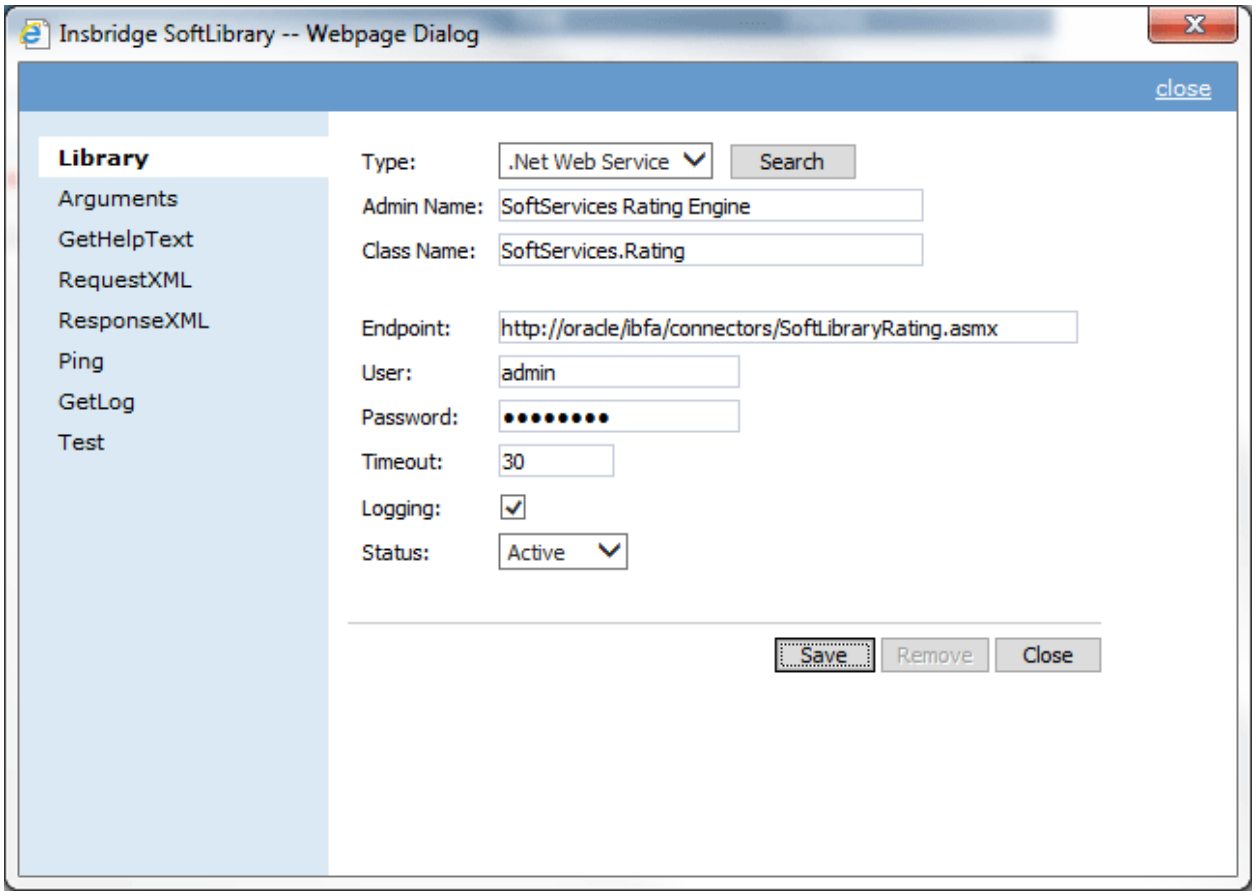


Figure 111 Completed SoftLibrary Window

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

Admin Name: This is the name of the SoftLibrary as it is displayed in RateManager. It is also the name that will be displayed on the main SoftLibraries page. Admin names must be unique.

Class Name: This is the URL of the web service. This information can be obtained from the developer. Class names must be unique.

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

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

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

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

milliseconds.

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

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

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

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

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

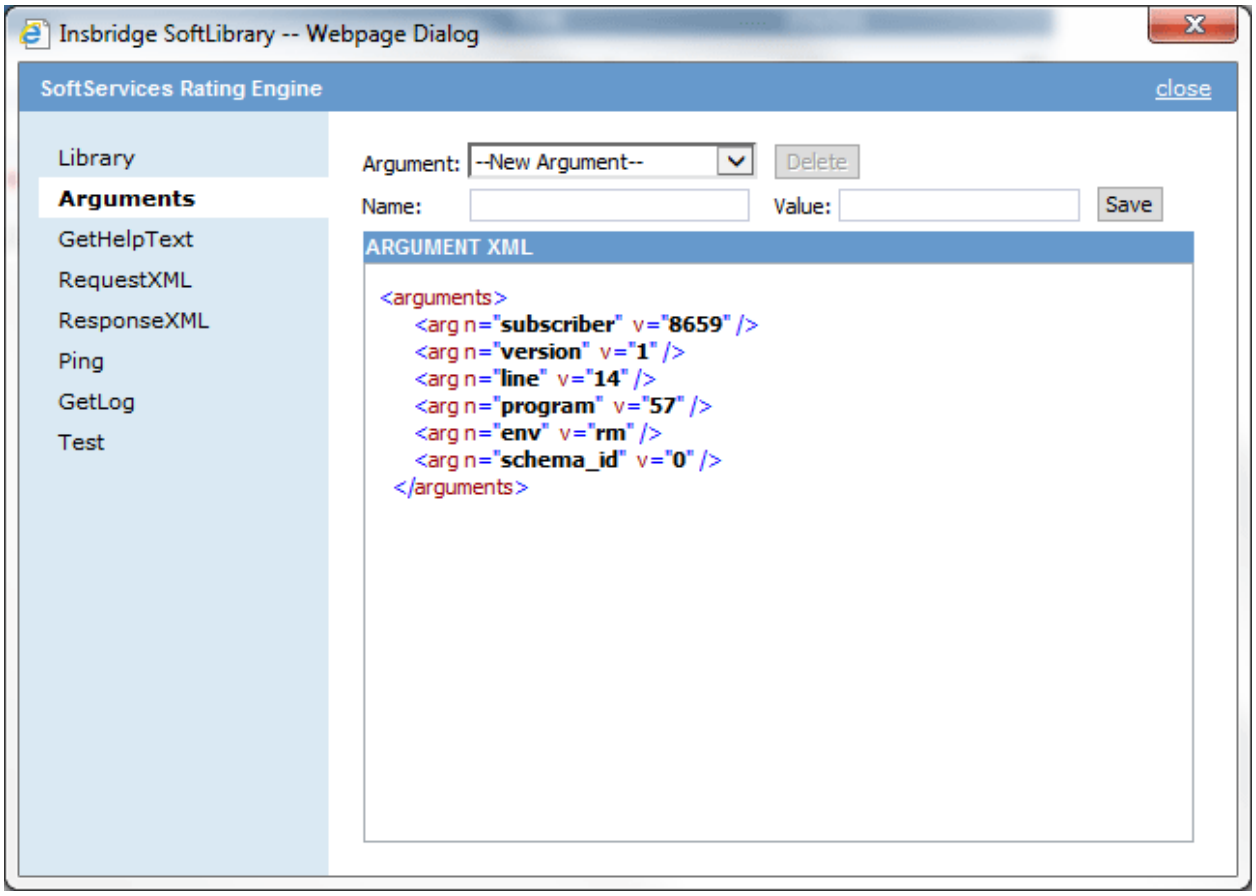


Figure 112 Arguments Window

6. Select **--New Argument--** in the Argument drop down list. Enter in a **Name** and a **Value**. Click **Save**. Your argument will be listed below.

Adding an Existing Argument

Select available **Arguments** from the drop down menu. The argument name will populate the **Name** field. The current value will populate the **Value** field. If these arguments are correct, click **Save**. If you need to, you can edit both the name field and the value field by typing in what you need. Existing arguments are not available until added.

Editing an Argument

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

Deleting an Argument

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

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

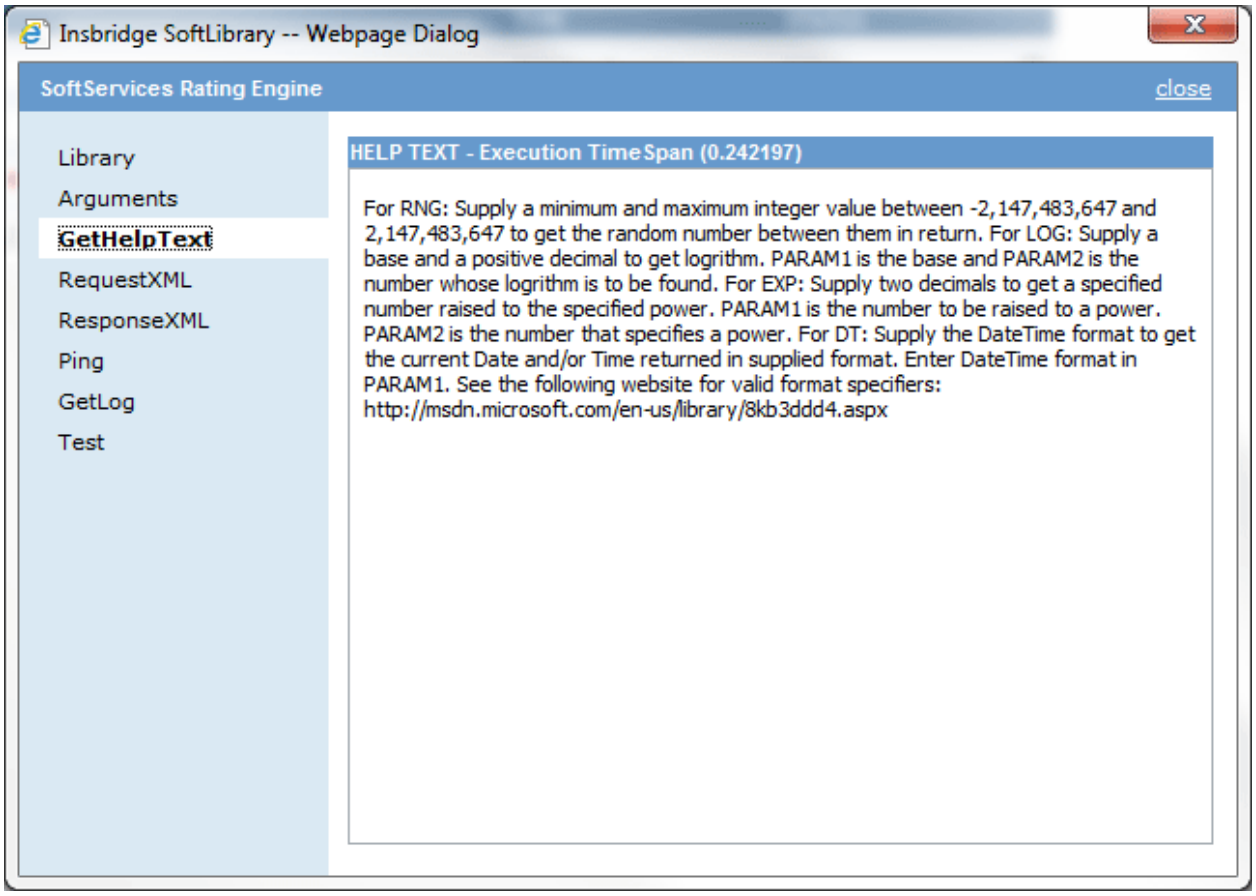


Figure 113 GetHelpText Window

8. The next information window is the **RequestXML** window. This window displays the request XML that is going out.

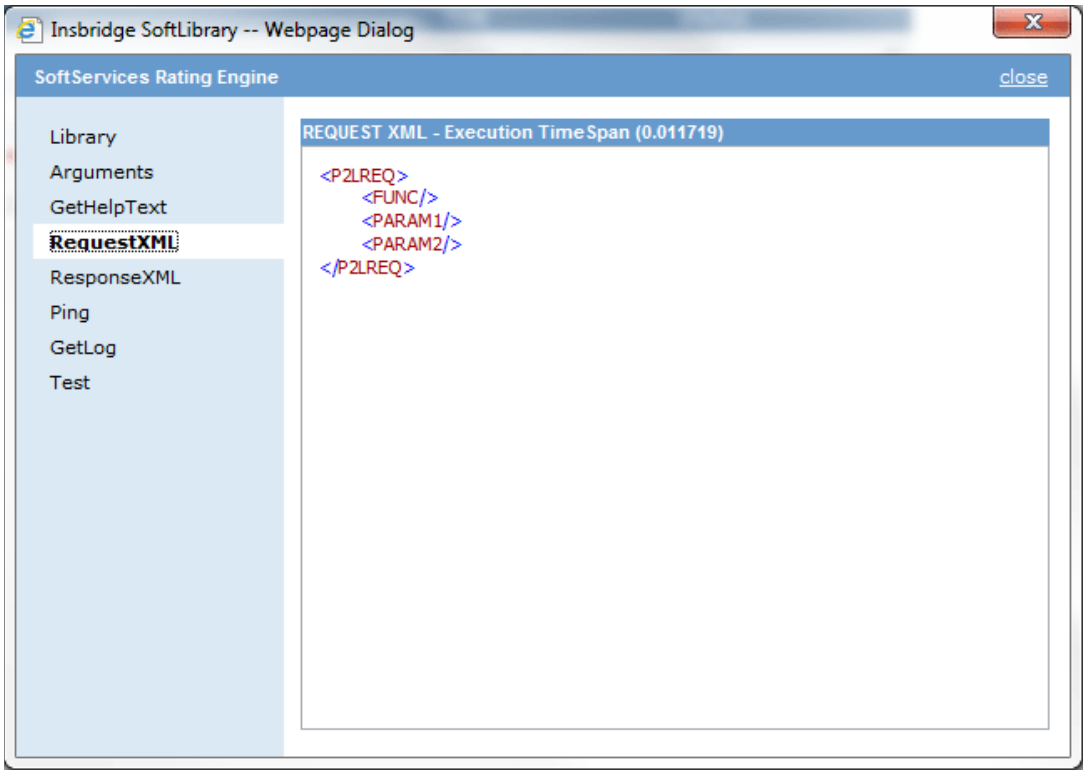


Figure 114 RequestXML Window

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

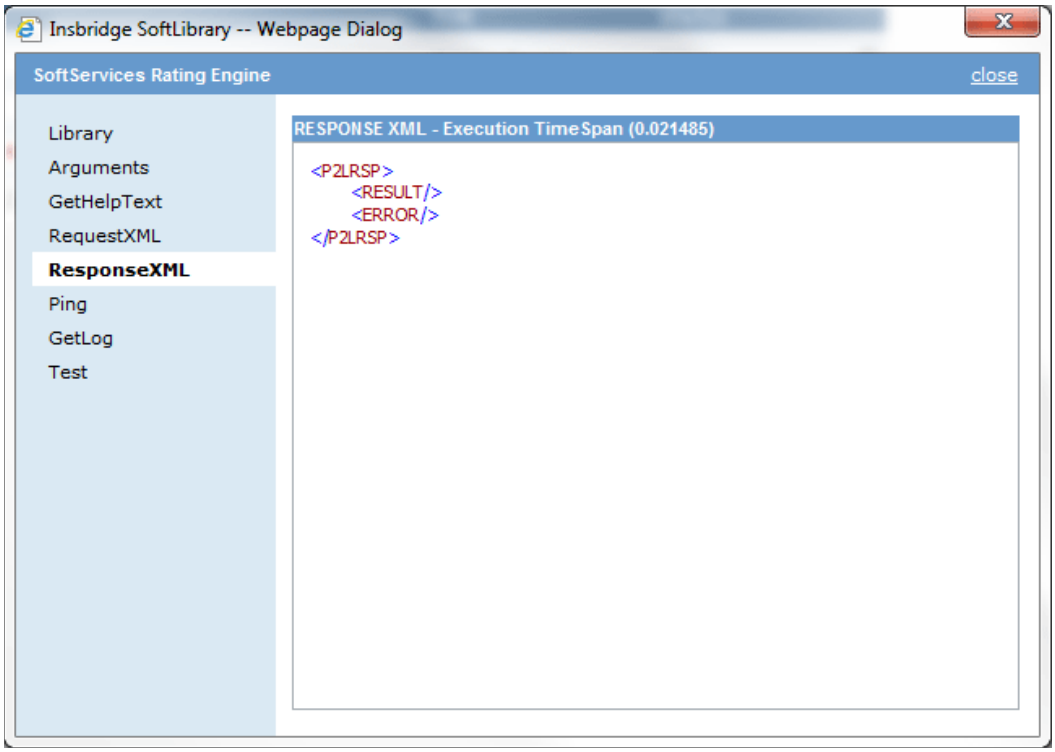


Figure 115 ResponseXML Window

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

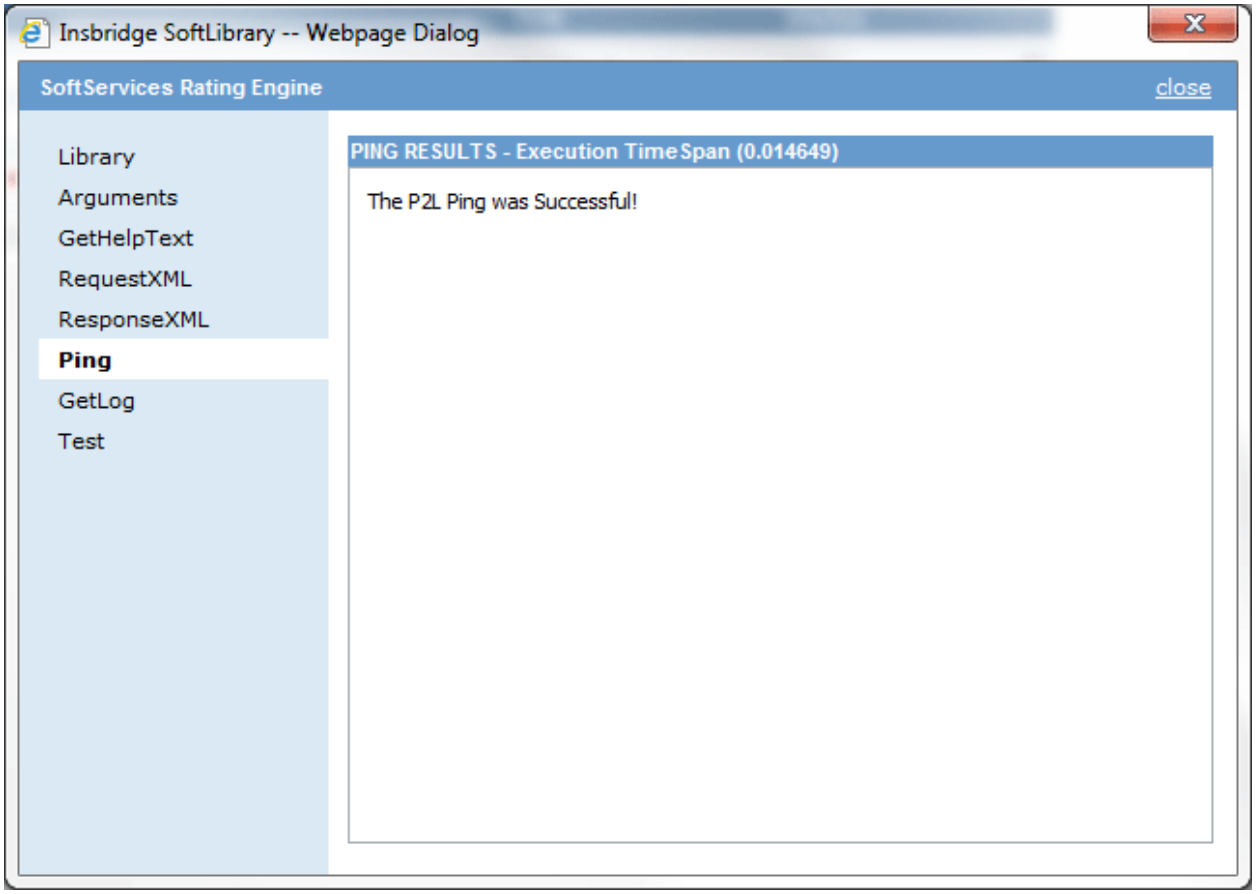


Figure 116 Ping Window

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

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

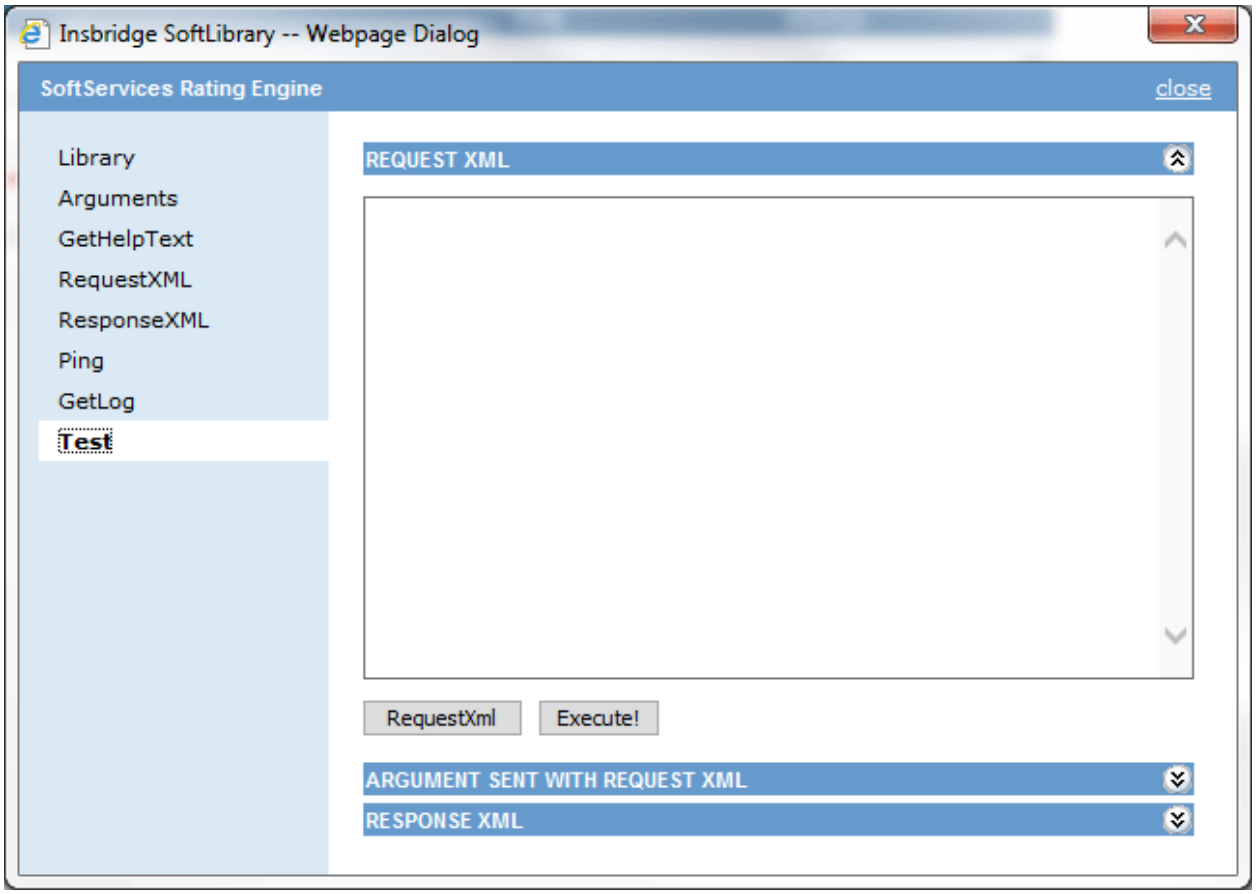


Figure 117 Test Window – Request

13. Click the Execute! button to execute the XML. The responseXml is displayed. To view the Arguments sent or to view the RequestXML, click the expand button .
14. After you have completed your SoftLibrary, return to the Library window. If the save button is available, click **Save** to save your entries and then close the window. If the save button is grayed out, you can close the window.

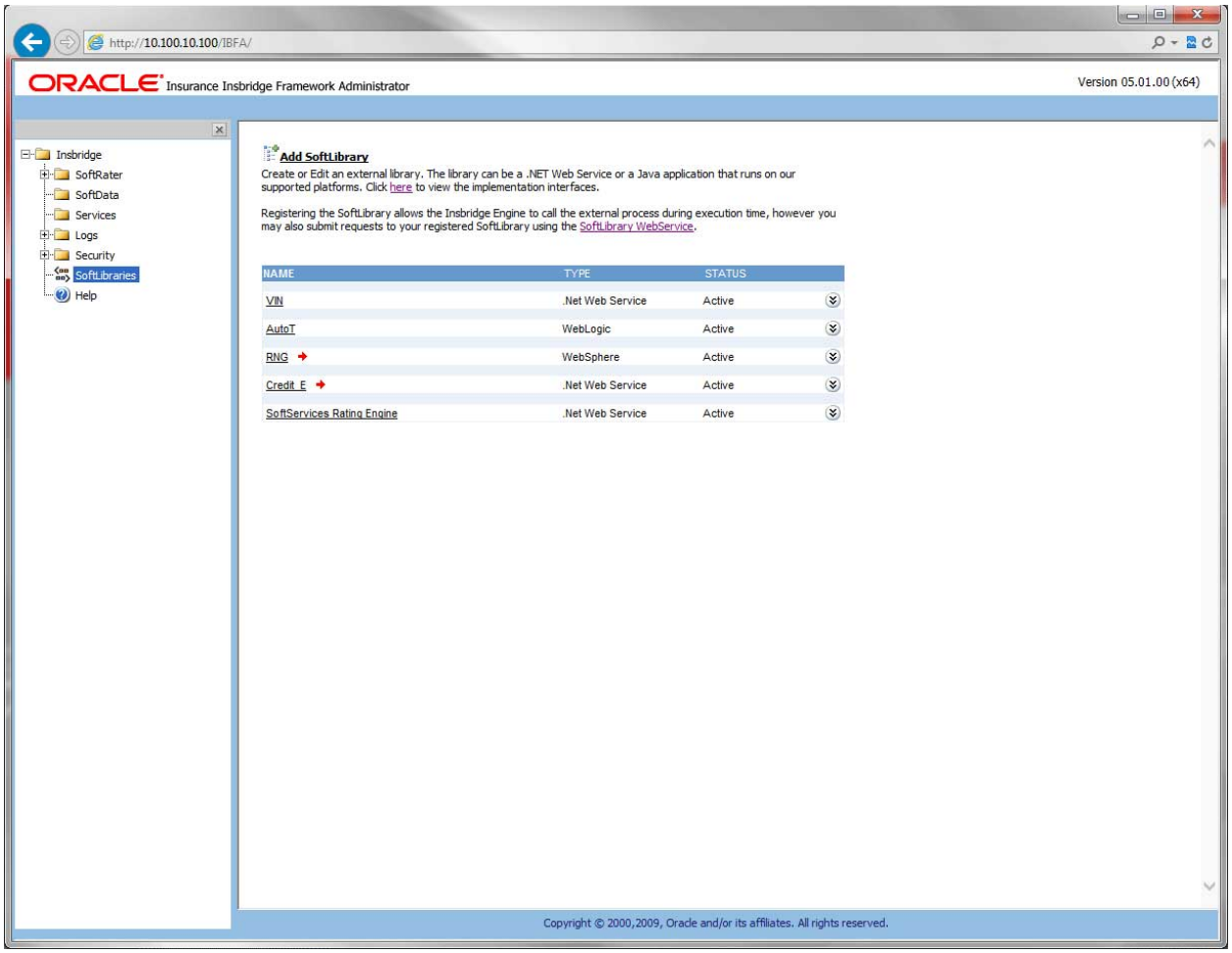


Figure 118 Completed SoftLibrary

Editing SoftLibraries

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

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

Deleting SoftLibraries

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

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

Searching for a SoftLibrary

You can search for SoftLibrary types by clicking the search button next to the Type option on the Add a SoftLibrary screen. A separate window is displayed. Enter in your Server Name and select the Registration type. Click Search. If the server is found, the SoftLibrary type will be listed in the Admin Name field. Select the library you want and click OK. The library information will be populated in IBFA.

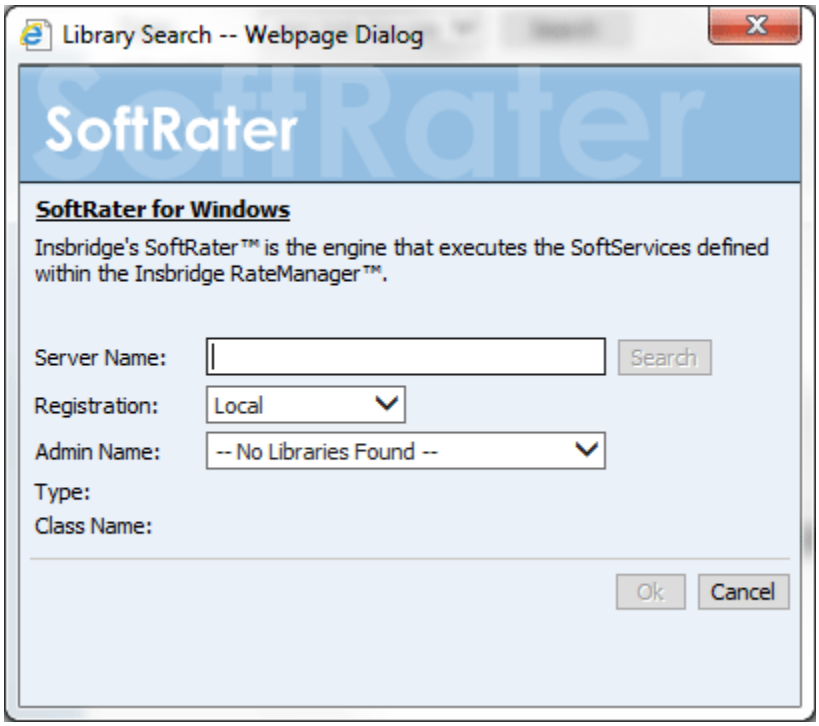


Figure 119 SoftLibrary Type Search

SOFTRATER UPDATES

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

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

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

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

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

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

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

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

CONTACTING SUPPORT

If you need assistance with an Oracle Insurance Insbridge 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

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 product.
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.
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 product.
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.
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".
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 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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