

ORACLE®

# What's New in Insbridge Version 5.5



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# What's New in Insbridge Version 5.5

## Features

Scenarios

Dynamic Categories

Data Source Query

Step Management

Filter Rule and Validation Rule Results in Testing and Test Case Editor

IBFA Audit Logs Enhancements

Support for MS SQL Server 2016



# Scenario

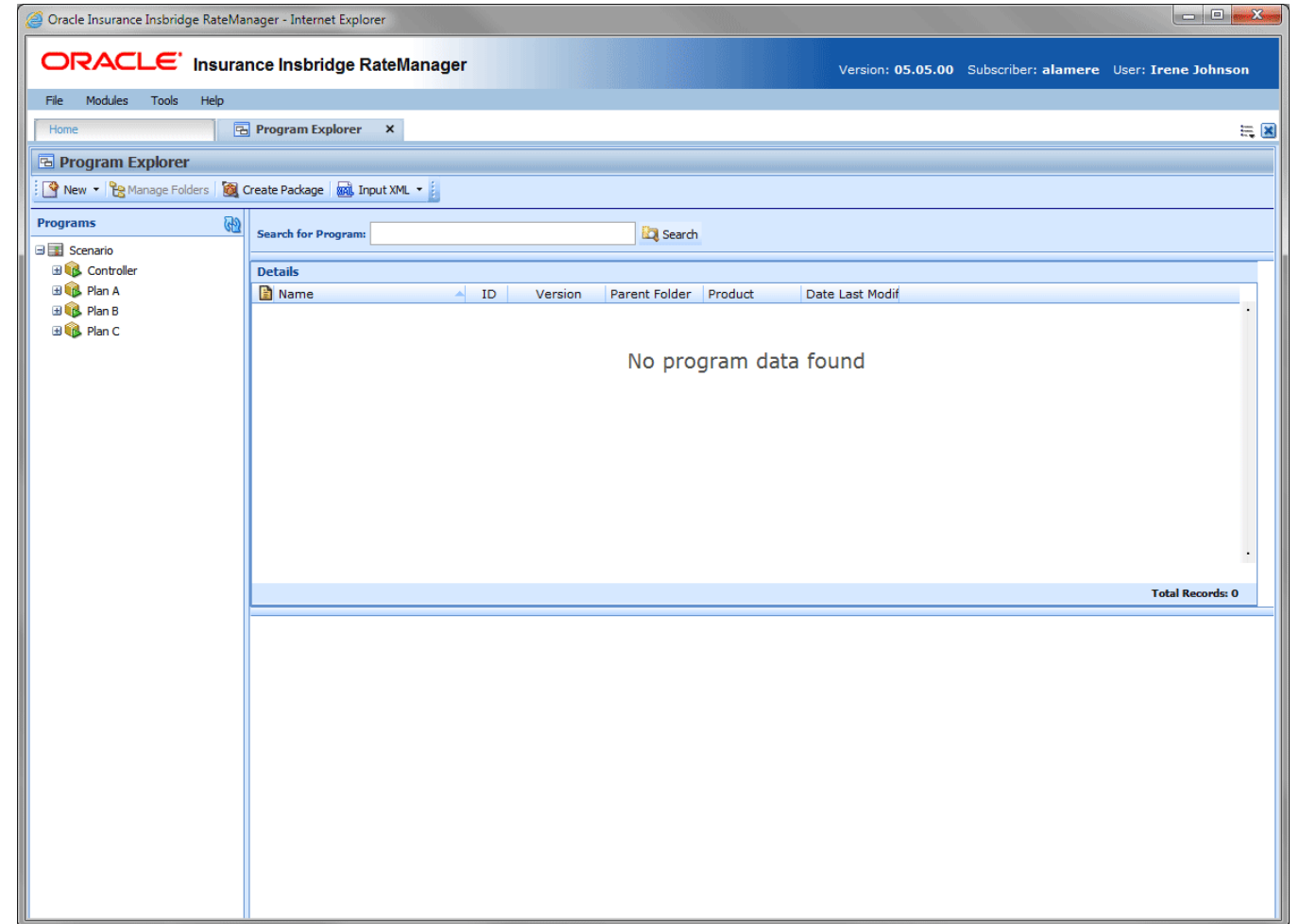
# Scenario

- Issue

Users that needed to only edit select tables had access to all table.

- Solution

Add the ability to let users edit selected tables.



# Set Up the Access Rights

The screenshot illustrates the process of setting up access rights in the Oracle Insurance Insbridge RateManager application. It shows three overlapping windows:

- Oracle Insurance Insbridge RateManager - Internet Explorer**: The main application window. The 'Tools' menu is open, and 'Security' is selected, leading to the 'Group Management' sub-menu. The 'Group Management' window shows a list of groups, with 'Scenario Admin' selected.
- Group Rights**: A dialog box showing the list of rights for the selected group. The 'Scenario Admin' group is highlighted, and the 'Scenarios' right is checked. The 'Write Access' checkbox is also checked.
- Group Rights**: A second dialog box showing the list of rights for the selected group. The 'Scenario Admin' group is highlighted, and the 'Scenarios' right is checked. The 'Write Access' checkbox is also checked.

The 'Group Rights' dialog box shows the following list of rights:

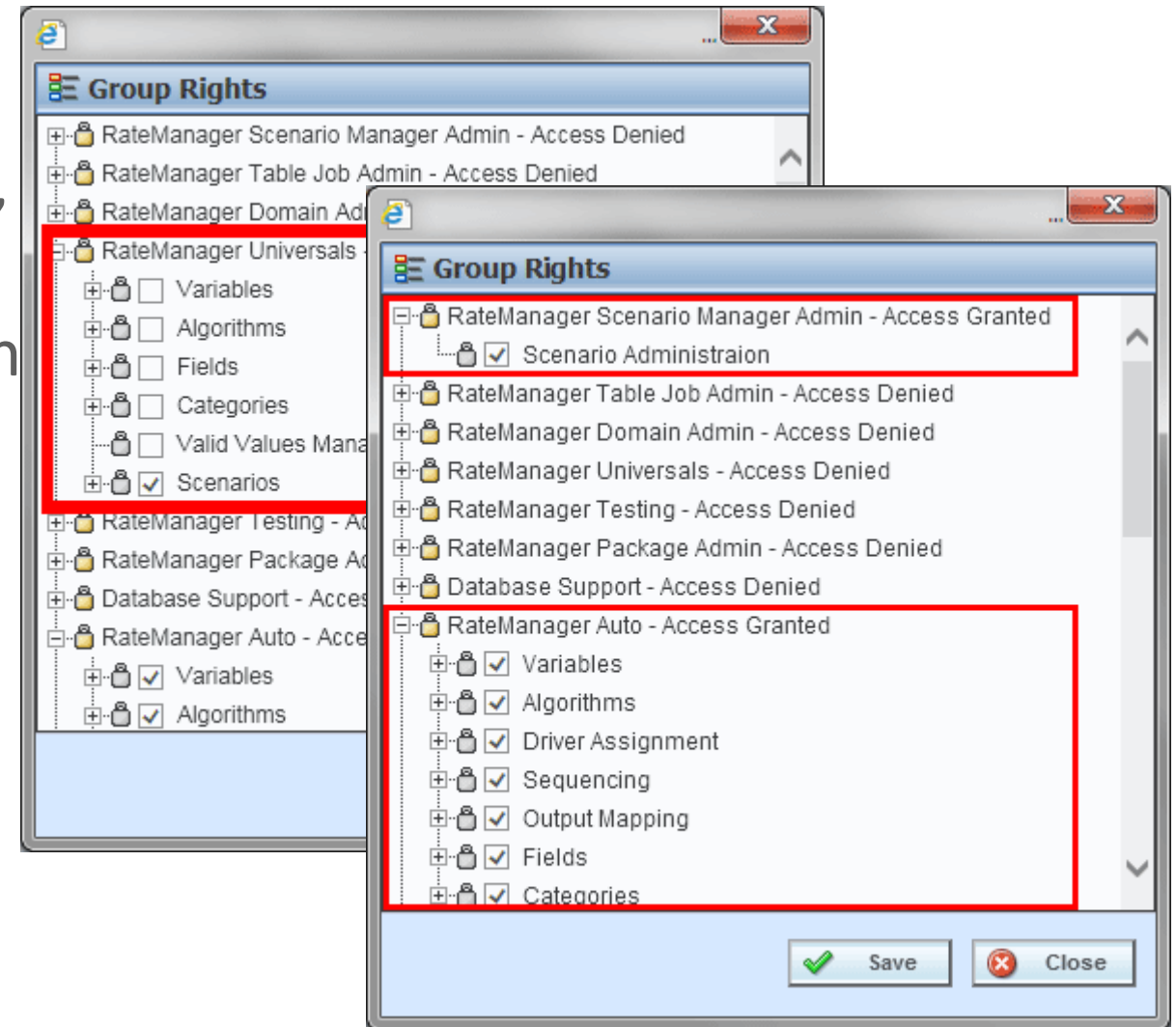
- RateManager Testing - Access Denied
- RateManager Package Admin - Access Denied
- Database Support - Access Denied
- RateManager Auto - Access Granted
- Variables
- Algorithms
- Driver Assignment
- Sequencing
- Output Mapping
- Fields
- Categories
- Program Management
- Valid Values Revision Selection
- Scenarios
- Write Access
- RateManager Home - Access Granted

The 'Group Rights' dialog box has 'Save' and 'Close' buttons at the bottom.



# Scenario Manager Permissions

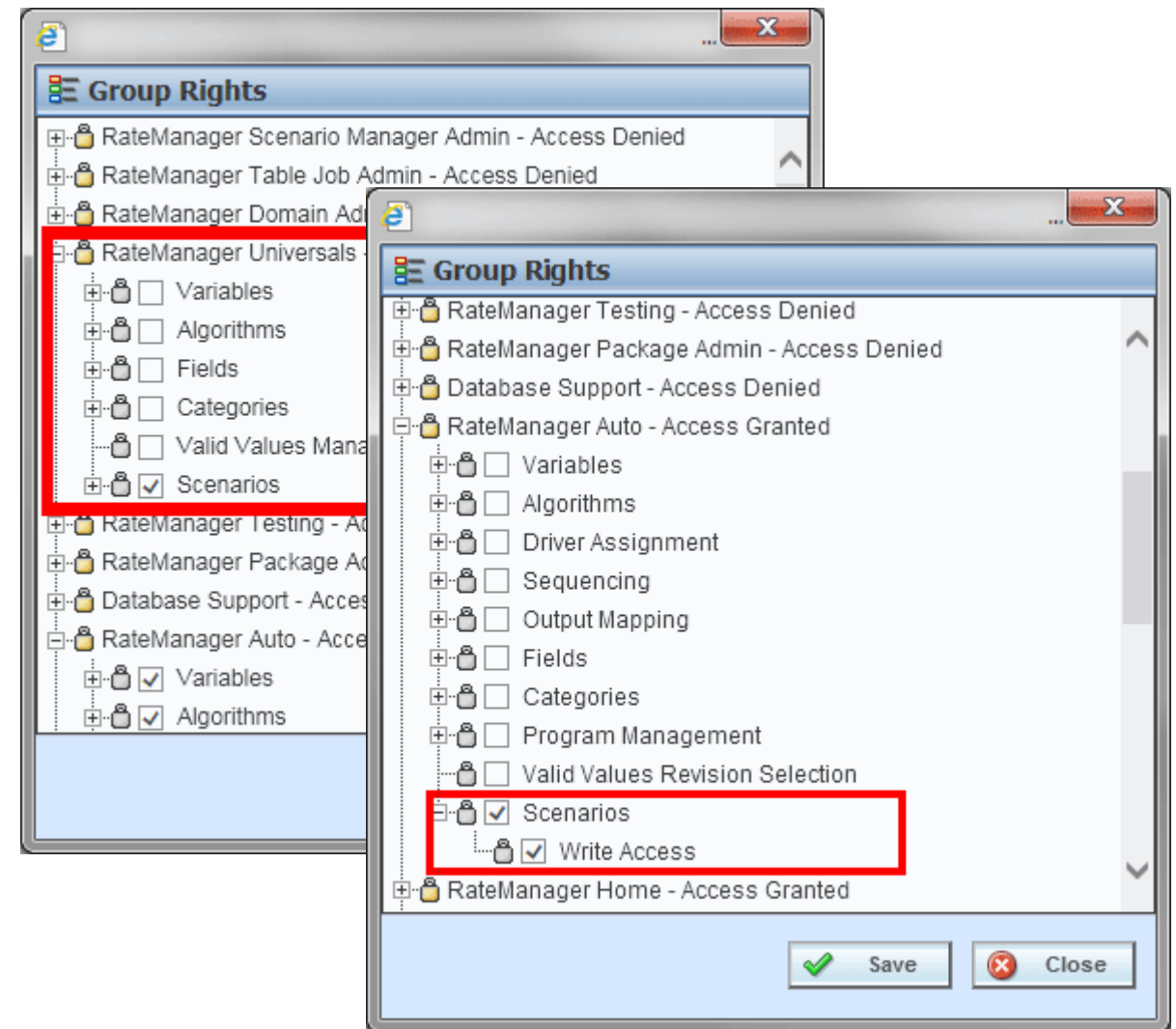
- **Set 1:** Scenario Manager Admin permissions are required to create, edit, and delete scenarios.
- **Set 2:** Product permissions for each of the products with program versions and tables that are to be included in the scenario are required.
- **Set 3:** OPTIONAL - If universal tables are to be added, Universal permissions are needed.





# Scenario User Permissions

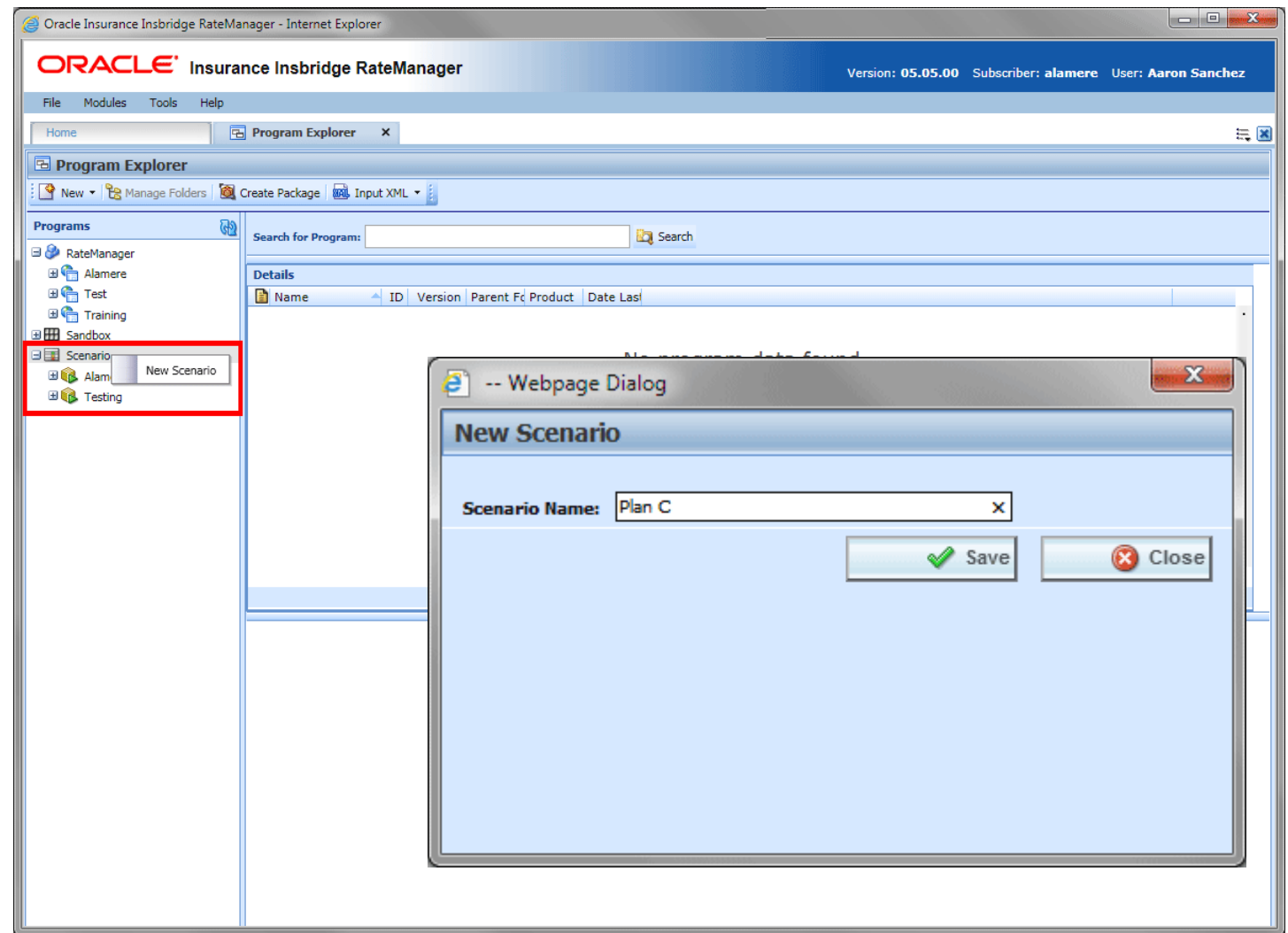
- **Set 1:** Scenario permissions for each of the products with the tables that are to be edited.
- **Set 2:** Table imports and exports require Table Job Admin – Import/Export permissions.
- **Set 3:** OPTIONAL - If universal tables are to be edited, Universal permissions are needed.



# Scenario Setup

Scenario setup is three parts

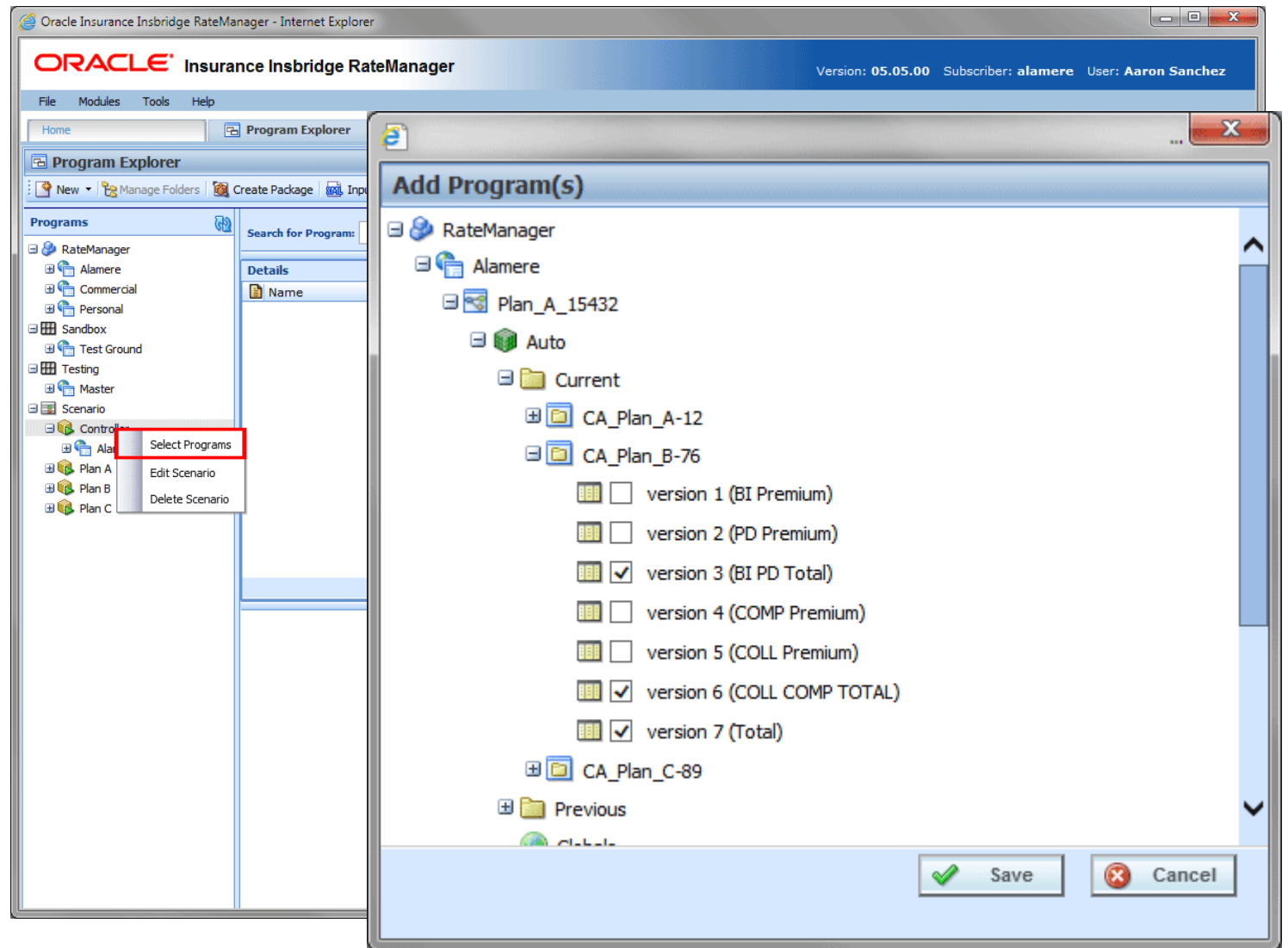
- Step 1: Create a Scenario.



# Scenario Setup

Scenario setup is three parts

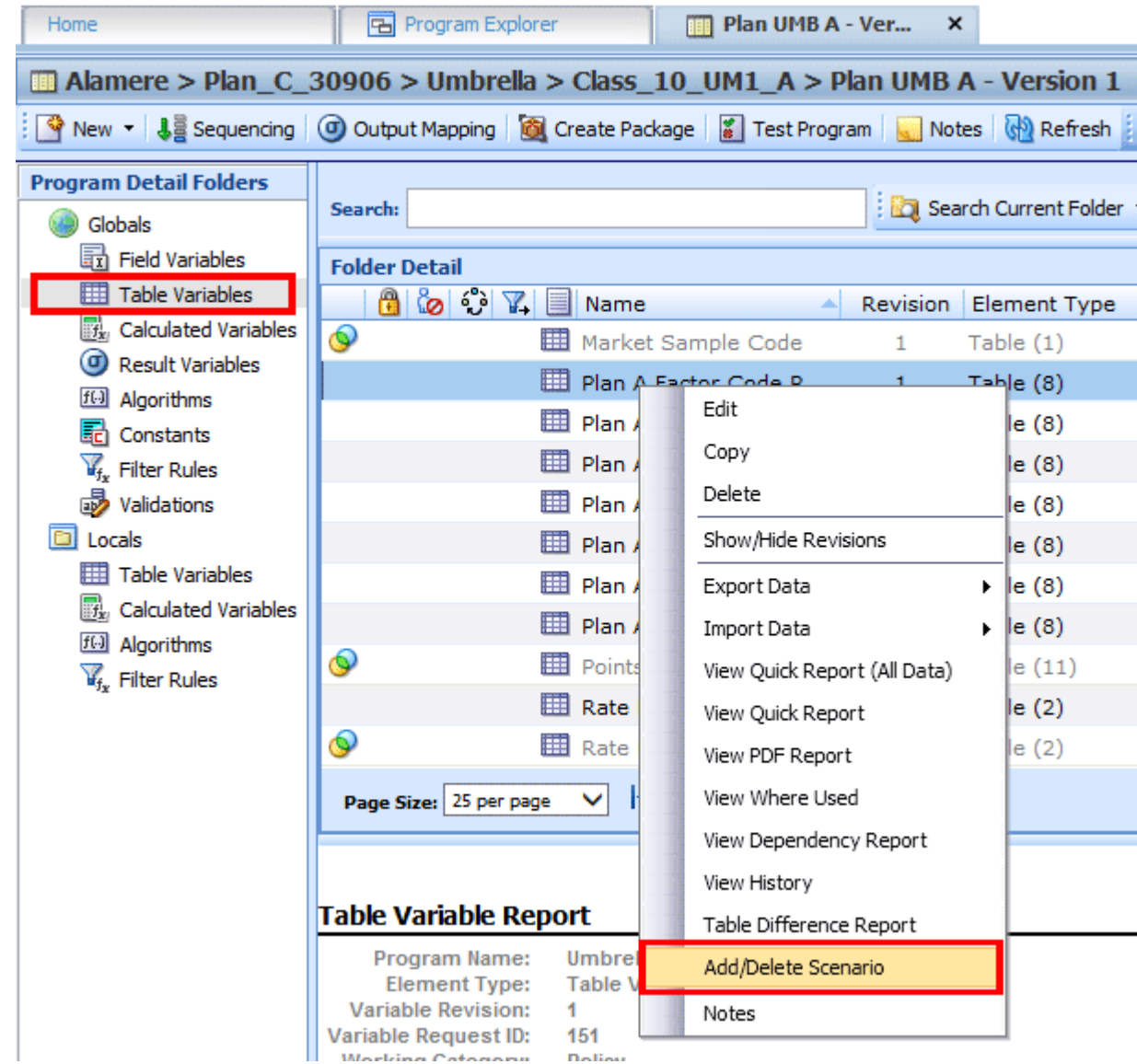
- Step 2: Add the Program Versions.



# Scenario Setup

Scenario setup is three parts

- Step 3: Add Tables.



# Scenario User

## A Scenario user can:

- Import or Export Table Data
- Edit Table Data
- Update the Default Value
- Create new revisions
- Set Active Revisions
- Add Notes to the Table
- Create Packages
- Test Program
- View Reports
- View Notes for the Program

The screenshot shows the Oracle Insurance Insbridge RateManager web application. The top navigation bar includes the Oracle logo, the application name, and user information (Subscriber: alamere, User: Irene Johnson). Below the navigation bar is a menu with options like File, Modules, Tools, and Help. The main content area is divided into two panes. The left pane, titled 'Program Explorer', shows a tree view of the program structure, including folders for 'Scenario', 'Alamere C1', 'Alamere', 'Personal', 'Auto', 'California', and 'CA\_Auto\_1'. The right pane, titled 'Program Version Details', displays a table of program versions for 'CA\_Auto\_1'. The table has columns for Name, ID, Version, Version Name, Lock, Parent Folder, Product, Date Last Modified, Last Packaged On, and Version Folder. Below the table, there is a section for 'CA\_Auto\_1' showing program version details, including the number of program versions (8), version name (Jan-Feb), versioning data modified date (November 29, 2016 2:13 PM), and date last modified (November 29, 2016 2:15 PM). At the bottom, there is a 'Program Versioning' table with columns for Row #, Program Versioning, Effective Date, and Effective Date.

Name	ID	Version	Version Name	Lock	Parent Folder	Product	Date Last Modified	Last Packaged On	Version Folder
CA_Auto_1	623458646	1	Jan-Feb	<input type="checkbox"/>	.../ California	Auto	Nov 29 2016, 02:13 PM	Jul 14 2017, 03:34 PM	\01 - Jan\
CA_Auto_1	623458646	2	Mar-Apr	<input type="checkbox"/>	.../ California	Auto	Nov 29 2016, 02:13 PM	Jan 05 2017, 06:06 PM	\03 - Mar\
CA_Auto_1	623458646	3	May-Jun	<input type="checkbox"/>	.../ California	Auto	Nov 29 2016, 02:14 PM	Aug 18 2016, 02:44 PM	\05 - May\

Total Records: 3

**CA\_Auto\_1**

Program Version: 1  
No of Program Versions: 8  
Version Name: Jan-Feb  
Versioning Data Modified: November 29, 2016 2:13 PM  
Date Last Modified: November 29, 2016 2:15 PM

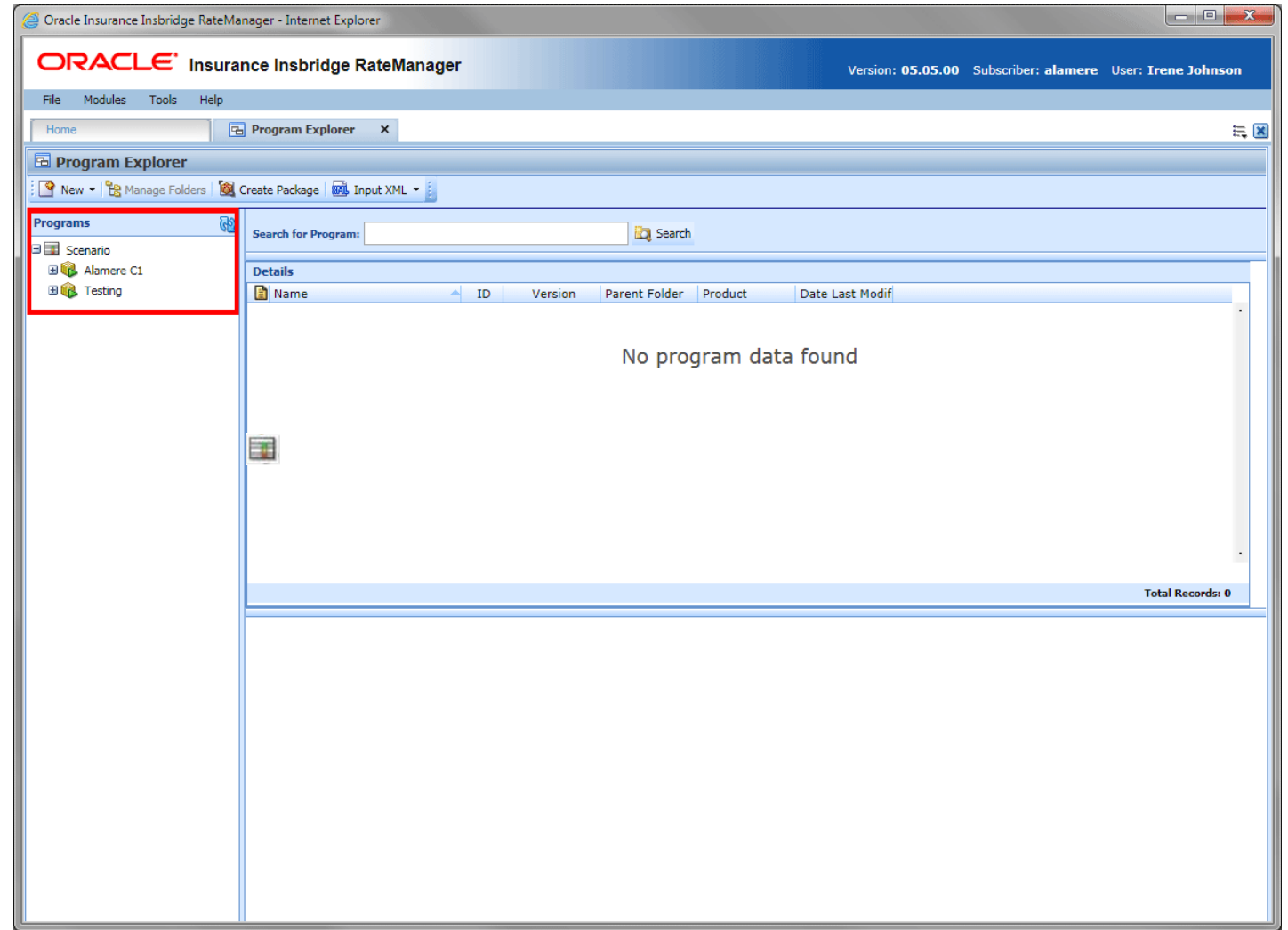
Program Versioning:

Row #	Program Versioning	Effective Date	Effective Date
	data	>=	<=

# Scenario User

## Program Explorer Scenario user views

- Only Scenarios
- Products with permissions
- Programs that have been added
- Scenario domain type
- Scenario domain



# Scenario User

## Program Details Scenario user views

- Only Tables

The screenshot displays the Oracle Insurance Insubridge RateManager web application interface. The top navigation bar includes the Oracle logo, the application name, and user information (Subscriber: alamere, User: Irene Johnson). The main content area shows the 'Table Variable Report' for the 'Plan 800 Code' variable. The report includes a table with columns for Variable, ZIP, Plan, 800 Code, Population, Age, and Income Per Household. The table contains four rows of data.

**Table Variable Report**

Program Name: CA\_Auto\_1  
Element Type: Table Variable  
Variable Revision: 1  
Variable Request ID: 338  
Working Category: Policy  
Limits: 500 Data Rows

	Variable	ZIP	Plan	800 Code	Population	Age	Income Per Household
	Plan 800 Code	ZIP	Plan	800 Code	Population	Age	Income Per Household
	type: String	type: Integer	type: Integer	type: Integer	type: Integer	type: Decimal	type: Decimal
	default: NOT_FOUND	condition: [ = ]	condition: [ = ]	condition: [ = ]	condition: [ = ]	condition: [ = ]	condition: [ = ]
1	QLK2	00601	10888	35.9	9888.00		
2	QWM1	00603	38929	38.2	10748.00		
3	QSC3	00606	3426	36.2	9243.00		
4	QAP4	00616	4801	38.7	10476.00		



# Scenario User

## Editing a Table

- Only Tables

The screenshot displays the Oracle Insurance Insbridge RateManager web application. The top navigation bar includes the Oracle logo, the application name, and user information (Subscriber: alamere, User: Irene Johnson). The main content area shows a breadcrumb trail: Alamere C1 > Auto > Personal > California > CA\_Auto\_1 - Version 1 (Jan-Feb). Below this, a 'Program Detail Folders' sidebar lists 'Globals', 'Table Variables', 'Locals', and 'Table Variables'. The main pane shows a 'Folder Detail' table with columns: Name, Revision, Element Type, Data Type, Category, Folder, and Date Last Modified. The table lists four variables: Action Count, Deductions Factor Accident Forgive, Plan 800 Code (selected), and Total Criminal Counts Local. Below the table, a 'Table Variable Report' section provides details for the selected variable: Program Name: CA\_Auto\_1, Element Type: Table Variable, Variable Revision: 1, Variable Request ID: 338, and Working Category: Policy. The report also includes a table with columns: Variable, Plan 800 Code, ZIP, Plan 800, Population, Age, and Income Per Household. The data rows show values for variables QLK2, QWM1, QSC3, and QAP4.

Variable	Plan 800 Code	ZIP	Plan 800	Population	Age	Income Per Household
1	QLK2	00601	10888	35.9	9888.00	
2	QWM1	00603	38929	38.2	10748.00	
3	QSC3	00606	3426	36.2	9243.00	
4	QAP4	00616	4801	38.7	10476.00	



# Dynamic Categories

# Dynamic Category Instance

- Issue

The number of category instances is controlled only by the occurrences supplied in the Insbridge input XML.

- Solution

Using the dynamic category instance function results in the correct number of category instances getting created.

The screenshot displays the Oracle Insurance Insbridge RateManager web application interface. The top navigation bar includes the Oracle logo, the application name, and user information (Subscriber: alamere, User: Mary Elliott). The main content area is titled 'Auto > CA\_Auto\_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1'. It features a toolbar with actions like Save, New Step, Edit Step, Delete Step, Delete Term, Change Step Order, and Advanced Options. The 'Algorithm Details' section shows the 'Algorithm Name' as 'Coverage Forms', 'Revision' as 1, and 'Dynamic Category' as OFF. The 'Working Category (Loop On)' is set to 'Policy'. The 'Filter Policy Where' section has a 'Select Filter Rule' button. The 'Steps' section shows 'Current Step: 2' and 'Step Type: Arithmetic'. The 'Next Step' is 'DONE'. The 'Available Variables, Functions, and Constants' section shows a dropdown menu with '<Select Category>' selected. The 'Algorithm Report' section shows the results of Step 1 and Step 2. Step 1 results show 'Results of Step 1' equals '-No Input', rounded to 2 place(s), then Step 2. Step 2 results show 'Coverage\_Surcharge' equals 'Coverage Code' plus 'Coverage Points Base Rate', rounded to 2 place(s), then 'DONE'.

Step	Step Type	Results
Step 1	Arithmetic	Results of Step 1 [equals] -No Input Round to 2 place(s) then [Step 2]
Step 2	Arithmetic	Coverage_Surcharge [equals] Coverage Code [plus] Coverage Points Base Rate No Round then [DONE]

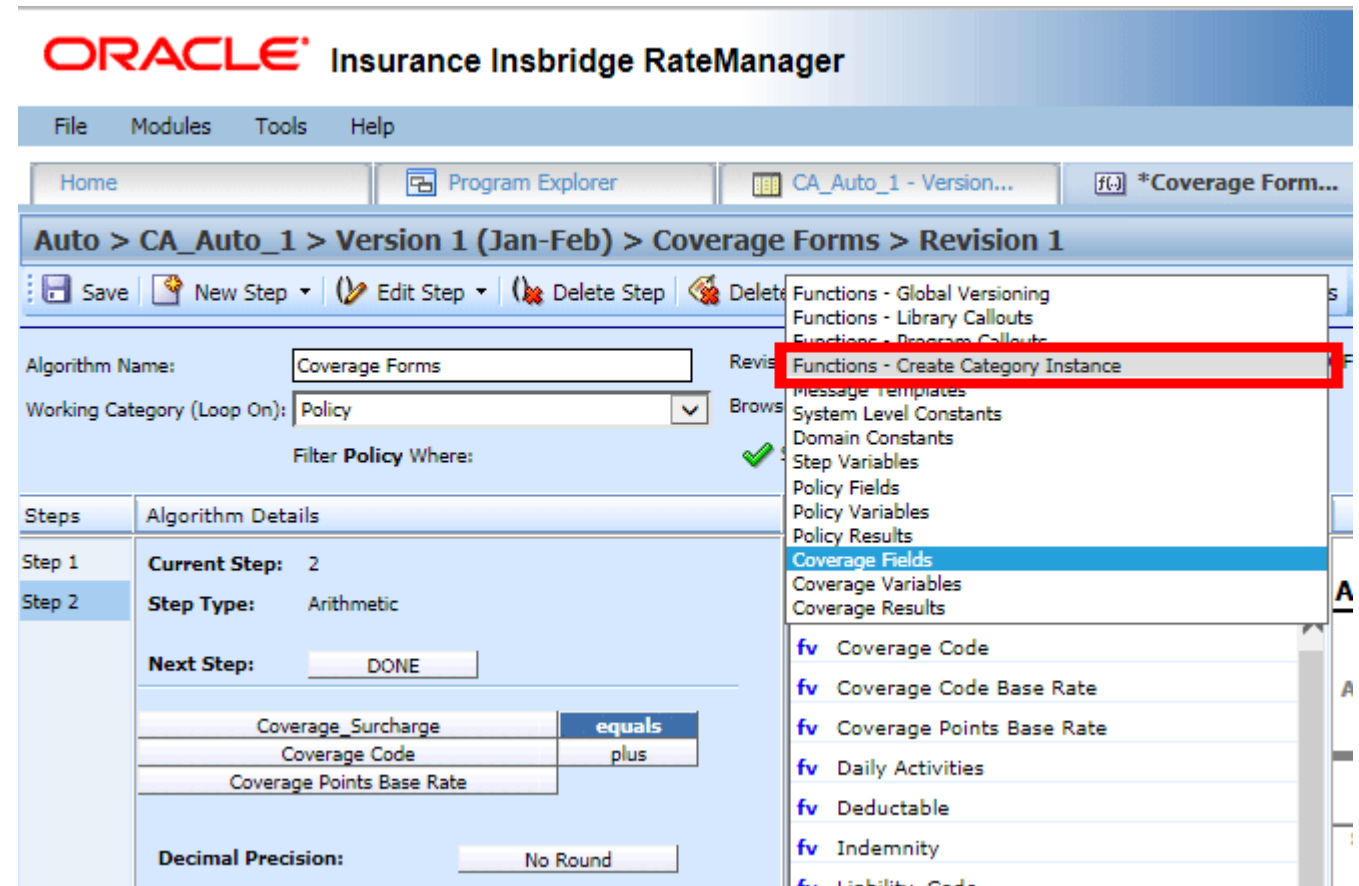


# Category Instance

- The Create Category Instance Function is for use in local algorithms only.
- Categories can be dynamically created for a top level category.
- The Policy category cannot be dynamically created.
- If the current working category is not Policy, only a child category of the current working category can be selected.
- Child categories can be one level down only. Second level child categories will not be available for selection.
- The Advanced Option, Do While loop, is automatically presented when creating the first dynamic category instance function/step.
- If more than one Create Category Instance is in an algorithm, Advanced Options Do While looping cannot be used and the Advanced Option Do While Looping screen is not presented.
- Optional mappings can be added or removed from a Create Category Instance.
- Create Category Instances category selection cannot be edited.
- The Create Category step can be moved.
- If a Create Category Instance is used, the Query Data Source step will be available.

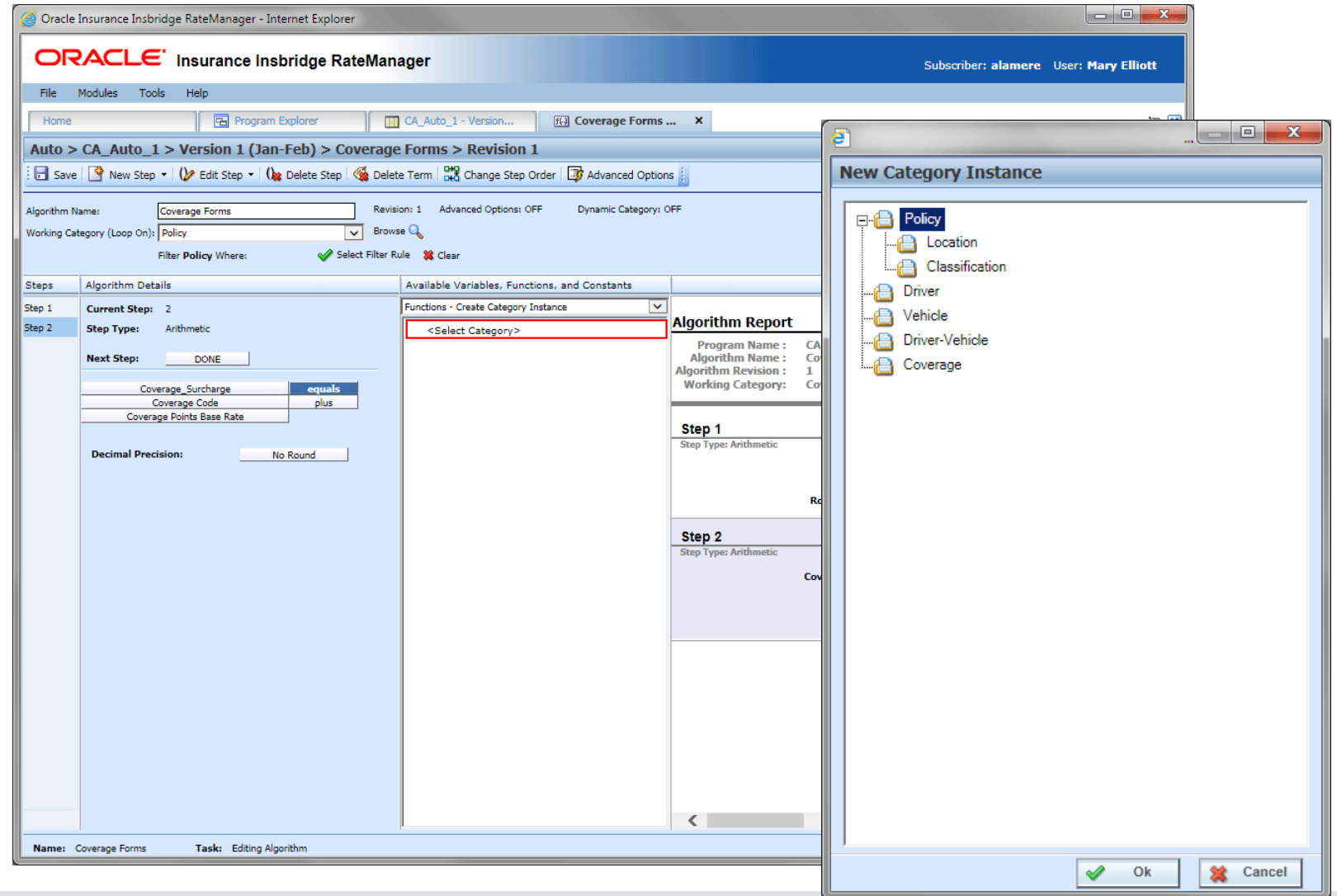
# Creating a Category Instance

- Select the function – Create Category Instance



# Creating a Category Instance

- Select the category



# Creating a Category Instance

- Add optional Do While Looping

Algorithm Advanced Options -- Webpage Dialog

Insbridge Advanced Options

Advanced Algorithm Looping

Options

Advanced Algorithm Looping - Options

Turning on the advanced looping will force an algorithm to re-run all of its steps until a condition is met or a maximum number of loops has been executed. Once the condition is met or a maximum number of loops has been executed, the algorithm will execute on the next instance of the working category and loop until the condition is met or a maximum number of loops has been executed.

Algorithm Details

TURN ON ADVANCED LOOPING ☐

DO WHILE

-- Insert Variable --

equals

-- Insert Variable --

MAX NUMBER OF LOOPS

Available Variables, Functions, and Constants

Policy Fields

- fv Acceleration\_Clause ✓
- fv Accident Forgiveness Discount
- fv Accidental Death Benefit
- fv Actions Count
- fv Actions Description
- fv Actions\_Negative
- fv Active Participant
- fv Actual Cash Value
- fv Adjuster
- fv Ane



# Creating a Category Instance

- Add optional Mapping


The screenshot displays the Oracle Insurance Insbridge RateManager application. The breadcrumb navigation shows the path: Auto > CA\_Auto\_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1. The 'Algorithm Name' is set to 'Coverage Forms' and the 'Working Category (Loop On)' is 'Policy'. The 'Steps' table indicates the current step is 'Step 2' with the type 'Create Category Instance'. The 'Next Step' is 'DONE'. A 'Location' field is present, and the 'USE FIELD MAPPING:' dropdown is set to '-- None --'. A 'Browse' button is visible, which has opened a list of functions. In this list, 'Functions - Create Category Instance' and 'Category Instance Mappings' are highlighted with red boxes. Below the list, a scrollable area shows various policy fields like 'Accident Forgiveness Discount', 'Accidental Death Benefit', etc.

Steps	Algorithm Details
Step 1	Current Step: 2
Step 2	Step Type: Create Category Instance
	Next Step: DONE
	Location
	USE FIELD MAPPING:
	-- None --

Functions - Global Versioning  
Functions - Library Callouts  
Functions - Program Callouts  
Functions - Create Category Instance  
Category Instance Mappings  
Message Templates  
System Level Constants  
Domain Constants  
Step Variables  
Policy Fields  
Policy Variables  
Policy Results

fv Accident Forgiveness Discount  
fv Accidental Death Benefit  
fv Actions Count  
fv Actions Description  
fv Actions\_Negative  
fv Active Participant  
fv Actual Cash Value

# Managing a Category Instance

-  An icon is displayed:
  - On local algorithms using a dynamic category.
  - On algorithms using a dynamic category in Sequencing.
- A Dynamic Category notice is in the algorithm. ON indicates a dynamic category step is used in the algorithm.
- Only mappings can be edited on a Dynamic Category step.
- Dynamic Category steps can be moved.
- Dynamic Category steps can be deleted.
  - If a Query Data Source step is included in the algorithm, that step must be deleted as well.
  - Deleting the Create Category Instance does not remove the Advanced Option Do While looping.

# Category Instance Indicator

- This option is available in the System Level Constants option

The screenshot displays the Oracle Insurance Insbridge RateManager application. The breadcrumb navigation shows the path: Auto > CA\_Auto\_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1. The 'Algorithm Name' is 'Coverage Forms' and the 'Working Category (Loop On)' is 'Policy'. The 'Step Type' is 'Count Across Category (All Available)'. The 'Next Step' is 'DONE'. The 'Available Variables, Functions, and Constants' list on the right includes 'System Level Constants', 'Current Category Instance #', 'Dynamic Category Instance Indicator' (highlighted with a red box), 'Current System Date and Time', 'Current System Date', 'Current Program Version', 'Current Rating Environment', 'Approval Required', 'Company Name', and 'Country'.

Steps	Algorithm Details	Available Variables, Functions, and Constants
Step 1	Current Step: 5	System Level Constants
Step 2	Step Type: Count Across Category (All Available)	Current Category Instance #
Step 3	Next Step: DONE	Dynamic Category Instance Indicator
Step 4		Current System Date and Time
Step 5		Current System Date
		Current Program Version
		Current Rating Environment
		Approval Required
		Company Name
		Country

# Category Instance In Test Case Editor

- The Create Category Instance step uses the same basic debug definition as callouts. Each item from the function mapping is available on the View Mapping link.
- A DYN\_ prefix is affixed to each dynamically created category instance. For example, DYN\_2 – (INSTANCE NAME) indicates that this is dynamic instance number 2.



# Category Instance In Callouts

- In P2P and P2L callouts, if a program returns more categories than were sent, the system uses the exception mapping to set the result variables of the new category that was created.
- If the callout does not have an exception mapping, the system matches the result variables for the created category.
- A system created attribute on the category “c” node, “di”, signifies that this category was created dynamically. The value is equal to 1 when true.



# Data Source Query

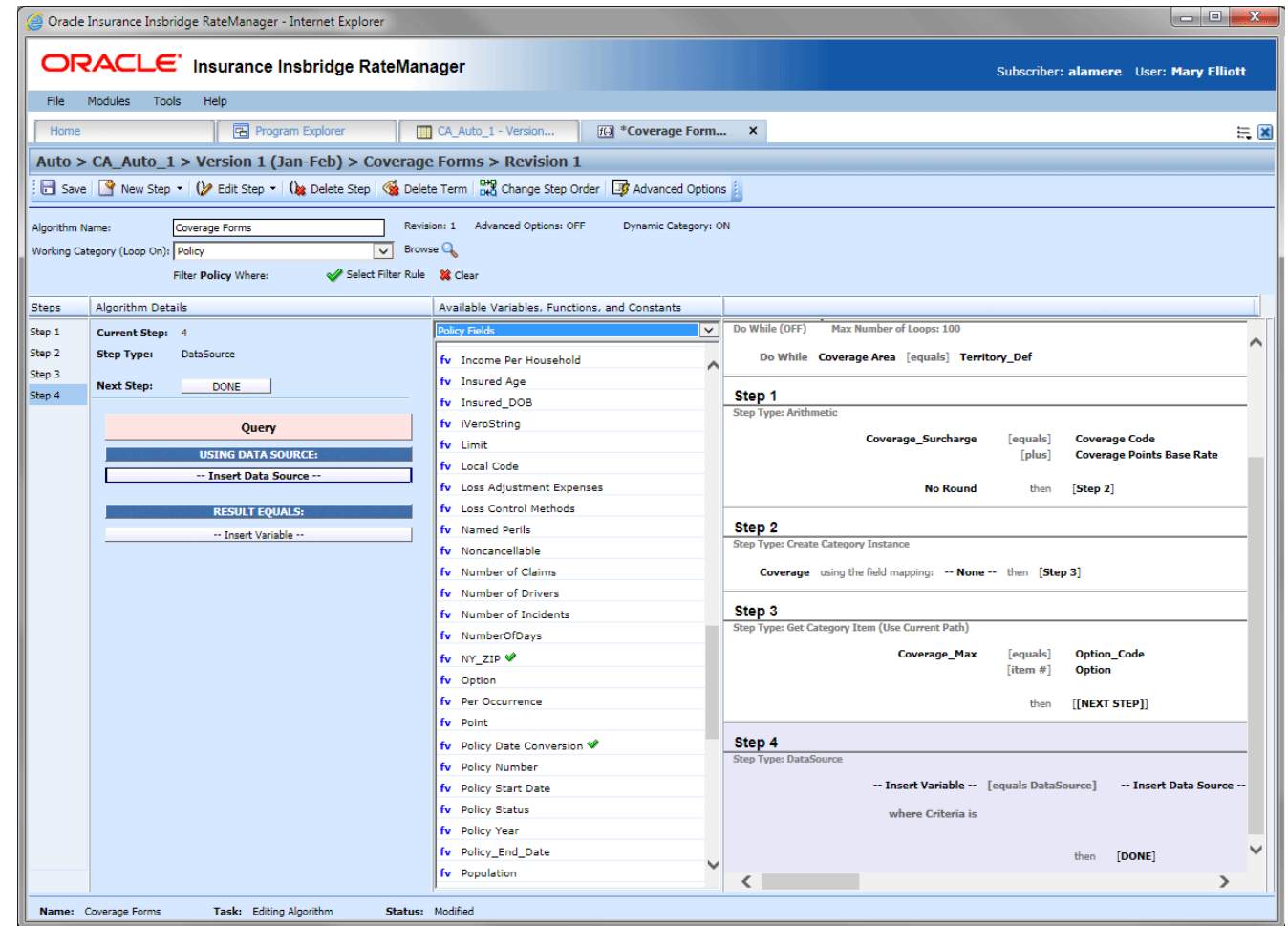
# Filtered Table Data Export

- Issue

With the addition of the Dynamic Category Instance function/step, the ability to retrieve and use values from data source tables is needed.

- Solution

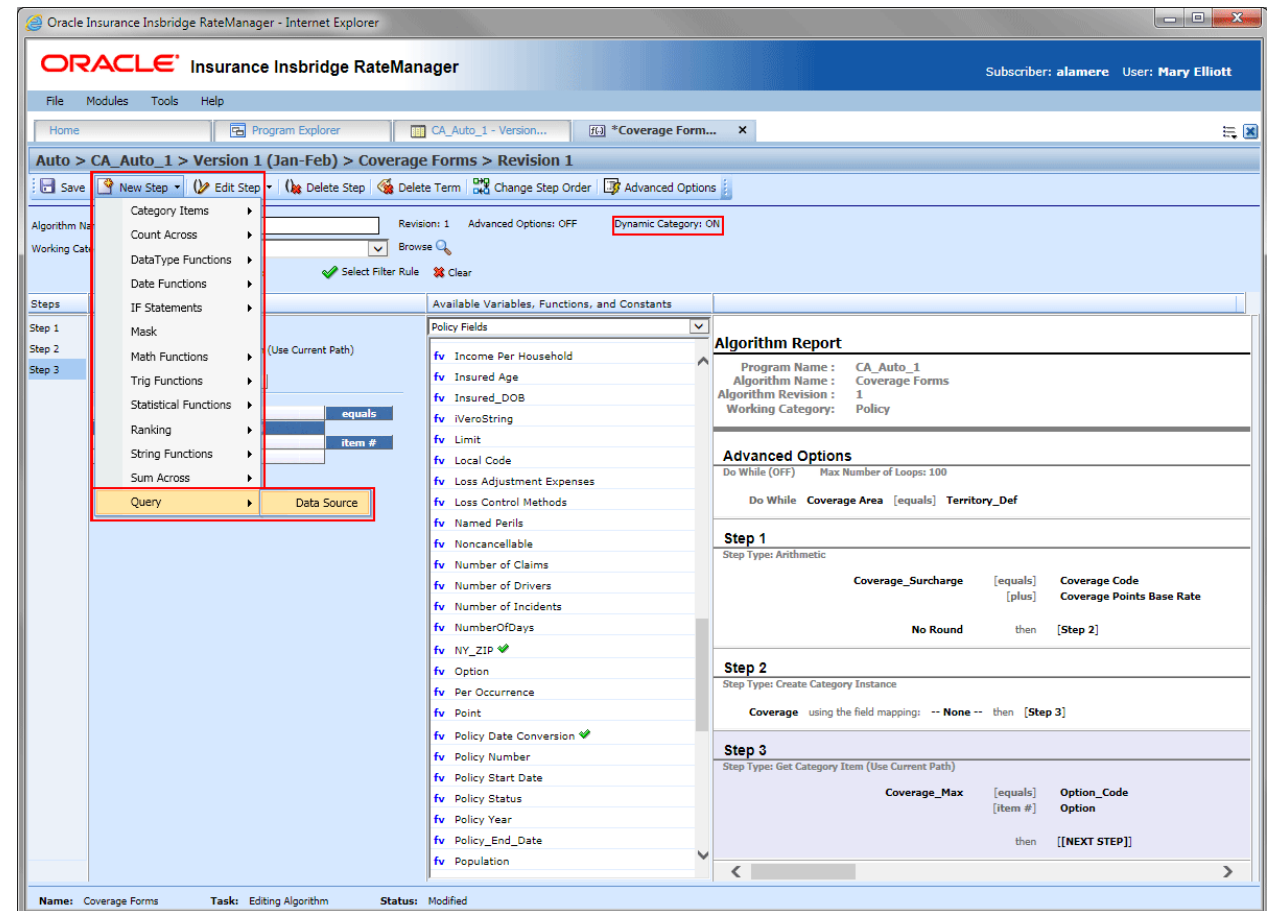
A new step type, Query Data Source, used with the function/step of Dynamic Category Instance, allows the dynamic category instance to retrieve and use values from data source tables.





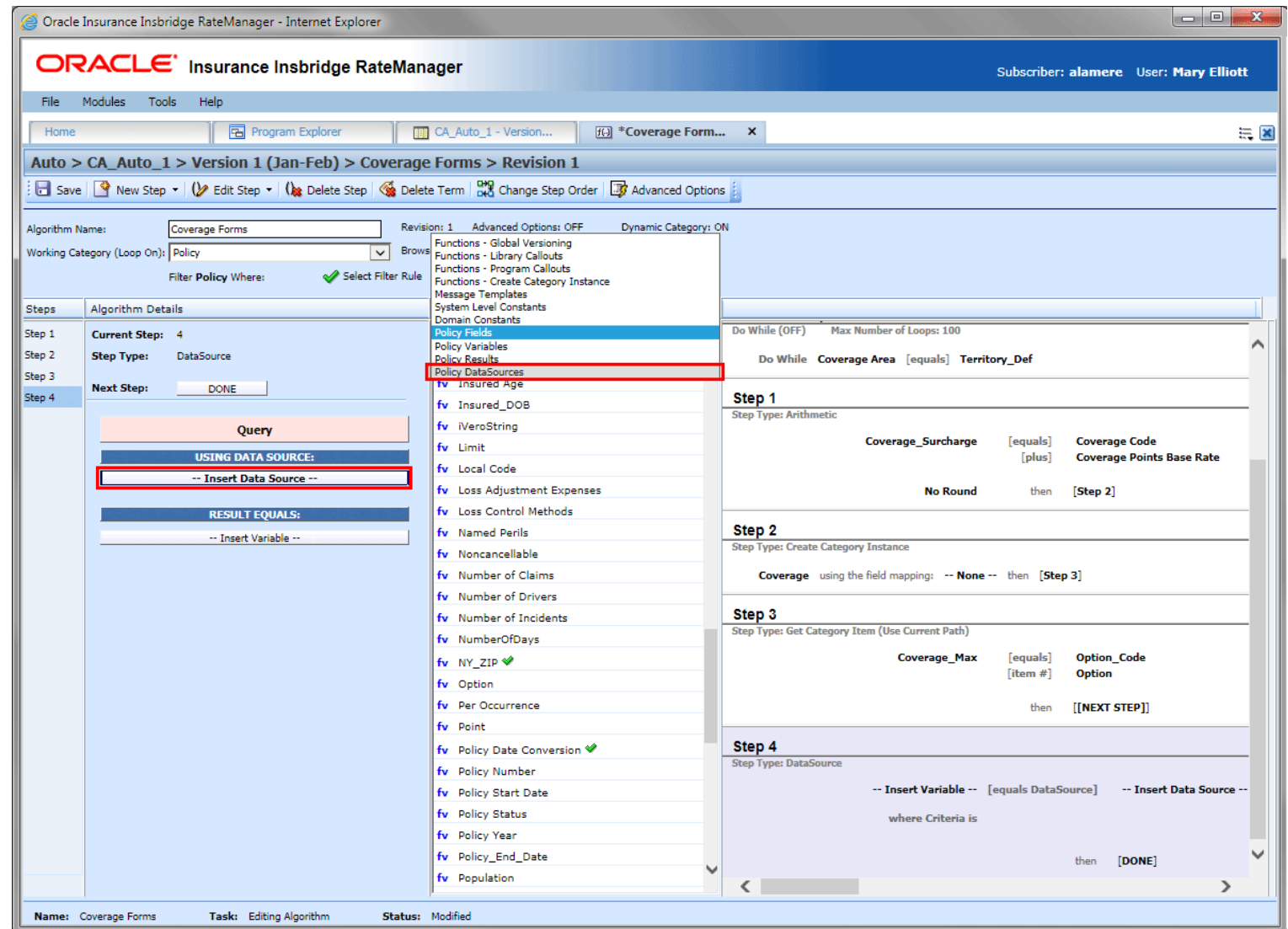
# Working with Data Queries

- New Step Type used with Dynamic Category.
- Performs a Query Against the Selected Data Source .
- In Local Algorithms only.
- Can also Use Validations.



# Creating Data Queries

- Select **[Category]** **Datasources** from the Available Variables, Functions and Constants.
- The available data sources will be populated.
- Select the data source you want to use. This determines the criteria.
- The Datasources option depends on the category used.



# Creating Data Queries

- **Using Data Source:** This field holds the selected data source. Validations are also available for use.
- **Result Equals:** This field holds a result variable. The data type must be the same as the data source.
- **Criteria:** This field is populated after you select the Using Data Source field.

The screenshot displays the Oracle Data Query Builder interface. The top navigation bar includes 'Home', 'Program Explorer', and a breadcrumb trail: 'Auto > CA\_Auto\_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1'. Below this, a toolbar contains buttons for 'Save', 'New Step', 'Edit Step', 'Delete Step', 'Delete Term', 'Change Step Order', and 'Advanced Options'. The main configuration area shows 'Algorithm Name: Coverage Forms', 'Revision: 1', 'Advanced Options: OFF', and 'Dynamic Category: ON' (highlighted with a red box). The 'Working Category (Loop On):' is set to 'Policy'. Below this, there are checkboxes for 'Filter Policy Where:' and 'Select Filter Rule', along with a 'Clear' button. The interface is divided into three main sections: 'Steps', 'Algorithm Details', and 'Available Variables, Functions, and Constants'. The 'Steps' section on the left shows a list of steps, with Step 4 selected. The 'Algorithm Details' section in the center shows the configuration for Step 4, which is a 'DataSource' step. It includes a 'Query' section with a 'Using Data Source:' field set to 'CA\_State\_Definition' and a 'Result Equals:' field set to 'Preferred\_Discount\_Code'. Below these fields is a table with columns '#', 'Criteria', 'Select Variable', and 'Op'. The table contains five rows of criteria: 1. [ZIP] = ZIP\_Plan\_800, 2. [City] = City, 3. [County] = County, 4. [Time Zone] = Time Zone, and 5. [T Code] = Territory A. The 'Available Variables, Functions, and Constants' section on the right shows a list of variables, including 'Population', 'Premium Earned', 'Premium Limit', 'Previous Company', 'RegionCode', 'Renewable Option', 'Renewal Date', 'Risk Retention Group', 'State of Domicile', 'Surrender Date', 'Term', 'Territory A' (checked), 'Territory B', 'Territory C', 'Territory Code', 'Time Zone', 'Total', and 'UsageCode'. The 'Territory A' variable is highlighted with a green checkmark.

#	Criteria	Select Variable	Op
1	[ZIP]	ZIP_Plan_800	=
2	[City]	City	=
3	[County]	County	=
4	[Time Zone]	Time Zone	=
5	[T Code]	Territory A	=



# Step Management

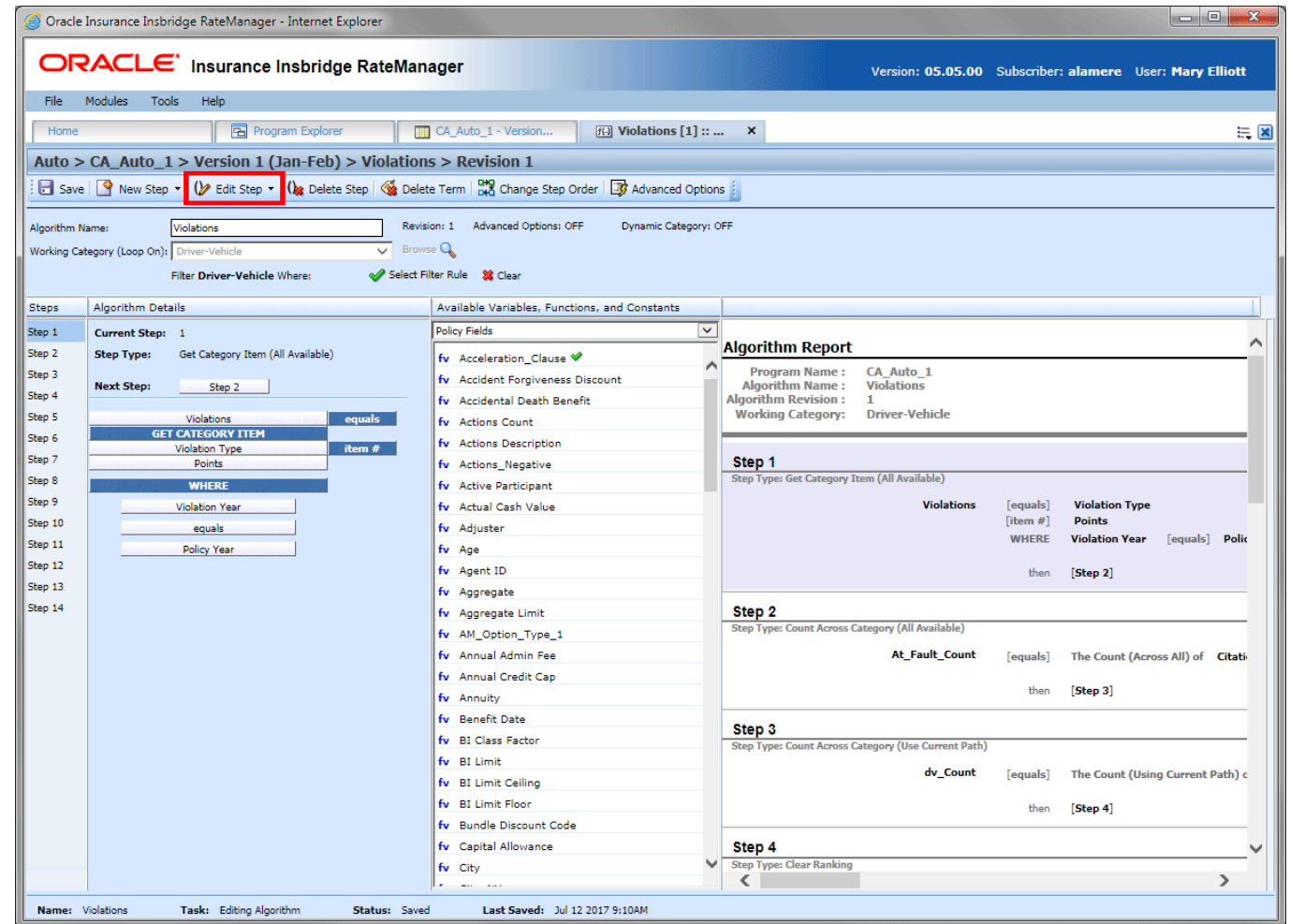
# Step Management

- Issue

Steps within a variable could not be copied.

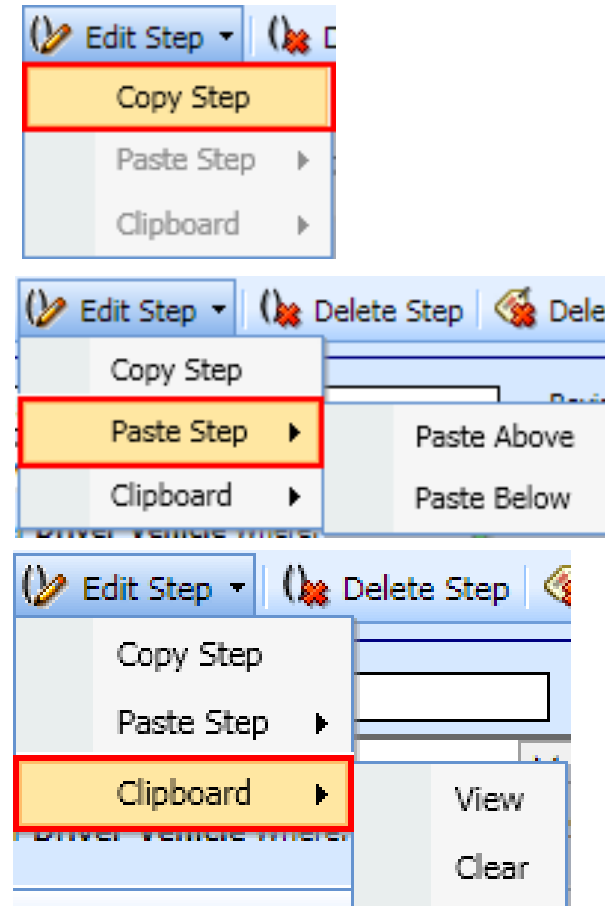
- Solution

Add the ability to copy one or more steps.



# Step Management

- **Copy Step** – Copies the selected step to the clipboard.
- **Paste Step** – Pastes the step(s) that are on the clipboard either above or below the selected step.
- **Clipboard** – Displays the currently copied steps in order.



# Step Management – Copy

- This option is always available.
- Any step can be copied.
- Steps are copied one at a time.
- Multiple step copies must be done in order.
- Steps can be copied and pasted only within the current element.

The screenshot displays the Oracle Insurance Insbridge RateManager application. The top navigation bar includes 'File', 'Modules', 'Tools', and 'Help'. Below this, a breadcrumb trail shows the path: 'Auto > CA\_Auto\_1 > Version 1 (Jan-Feb) > Violations > Revision 1'. A toolbar contains buttons for 'Save', 'New Step', 'Edit Step', 'Delete Step', 'Delete Term', 'Change Step Order', and 'Advanced Option'. The 'Edit Step' button is highlighted with a red box, and its dropdown menu is open, showing 'Copy Step' (highlighted in yellow), 'Paste Step', and 'Clipboard'. The main workspace is divided into three panes: 'Steps' (listing Step 1 through Step 12, with Step 1 highlighted in red), 'Algorithm Details' (showing 'Current Step: 1', 'Step Type: Get Category Item (All Available)', and 'Next Step: DONE'), and 'Available Variables, Functions, and Constants' (listing various policy fields like 'Acceleration\_Clause', 'Accident Forgiveness Discount', etc.).



# Step Management – Paste

- Clipboard must be populated for this option.
- Placement must be selected.
- Multiple steps are pasted in the order copied.
- The pasted steps are highlighted.
- Steps can be copied and pasted only within the current element.

**ORACLE Insurance Insbridge RateManager**

File Modules Tools Help

Home Program Explorer CA\_Auto\_1 - Version... \*Violations [1] ...

Auto > CA\_Auto\_1 > Version 1 (Jan-Feb) > Violations > Revision 1

Save New Step Edit Step Delete Step Delete Term Change Step Order Advanced Options

Algorithm Name: Violations Revision: 1 Advanced Options: OFF Dynamic Category: C

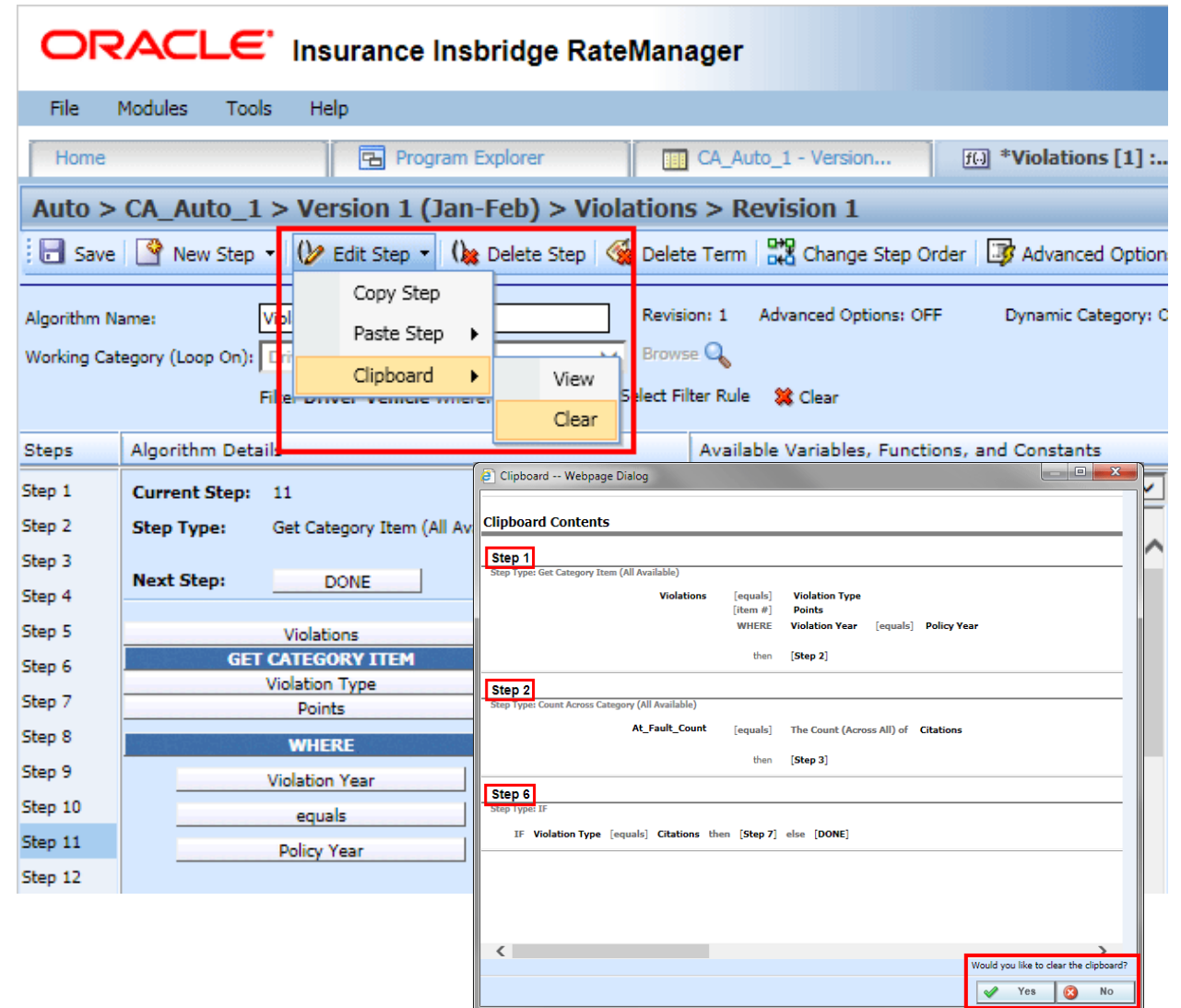
Working Category (Loop On): Driver-Vehicle Browse

Filter Driver-Vehicle Where: Select Filter Rule Clear

Steps	Algorithm Details	Available Variables, Functions, and Constants
Step 1	<b>Current Step:</b> 10	Policy Fields
Step 2	<b>Step Type:</b> Arithmetic	fv Acceleration_Clause ✓
Step 3	<b>Next Step:</b> DONE	fv Accident Forgiveness Discount
Step 4		fv Accidental Death Benefit
Step 5	Results of Step 10 equals	fv Actions Count
Step 6	Final minus	fv Actions Description
Step 7	Results of Step 3	fv Actions_Negative
Step 8	<b>Decimal Precision:</b> Round to 2 places	fv Active Participant
Step 9		fv Actual Cash Value
Step 10		fv Adjuster
Step 11		fv Age
Step 12		fv Agent ID
Step 13		fv Aggregate

# Step Management – Clipboard

- Clipboard must be populated for this option.
- Clipboard clearing through menu option, pasting, or closing variable.
- Contents can be viewed.





# Filter Rules and Validation Rules Results

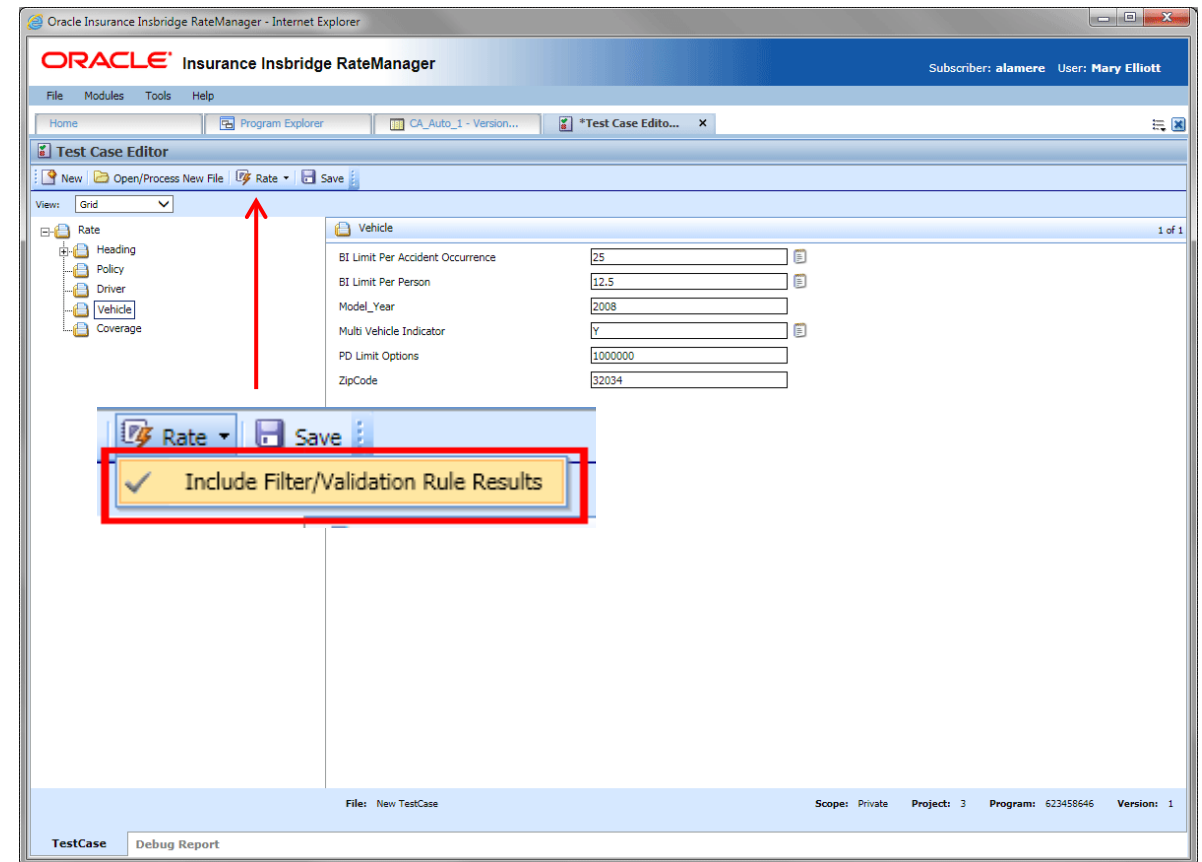
# Filter Rules and Validation Rules Results

- Issue

Debug Reports could get quite large with unnecessary rules being returned

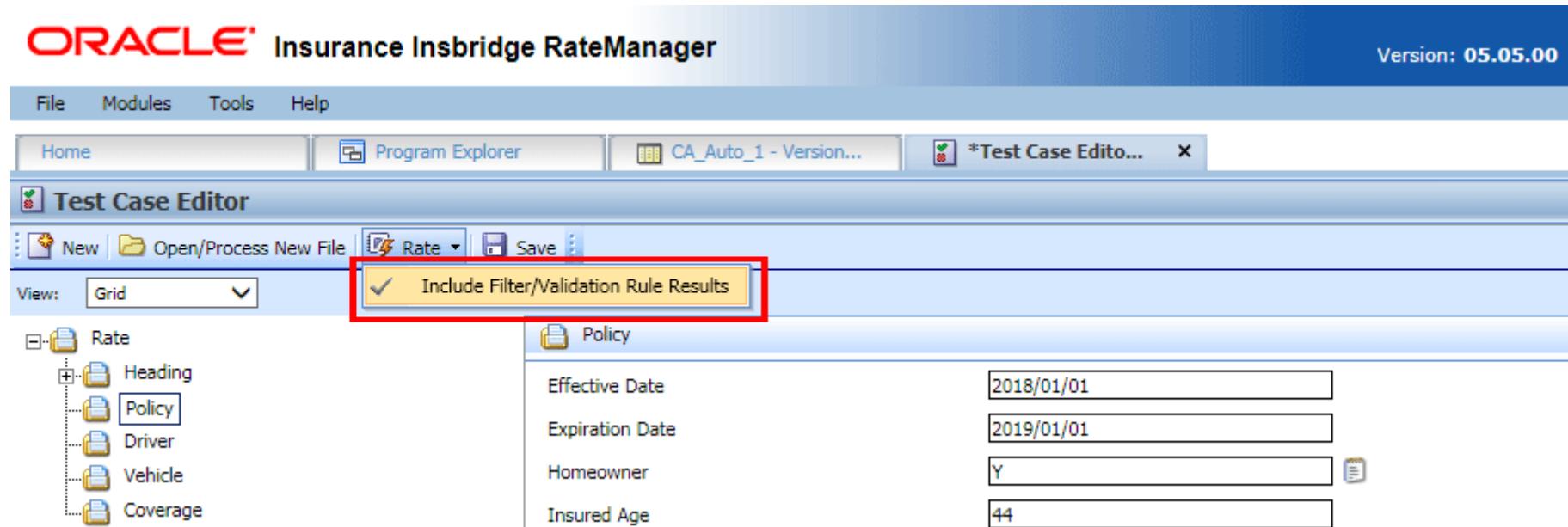
- Solution

Provide the option to not return rules that are not needed.



# Filter Rules and Validation Rules Results

- Filter rules and validation rules are automatically included in debug reports.
- Uncheck to remove them.





# Audit Logs in IBFA



# Audit Logs in IBFA

The types of audit events recorded are:

- **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.
- **Copy:** An event that records the copying of a package.
- **Move:** An event that records the moving of a package.
- **Backup:** An event that records the creation of a SoftRater Native backup.



# Database Support



# Application Server and Database Updates

- Support has been added for:
  - Microsoft SQL Server 2016



# Application Server and Database Updates

- Support has ended for:
  - Oracle WebLogic 11g release 10.3.6.0

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