

ORACLE®

A man in a blue shirt is smiling and talking to another man in a plaid shirt. They are sitting at a table with a laptop and a coffee cup. The background is a blurred office or meeting room.

What's New in Insbridge Version 5.5



Safe Harbor Statement

The preceding is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

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

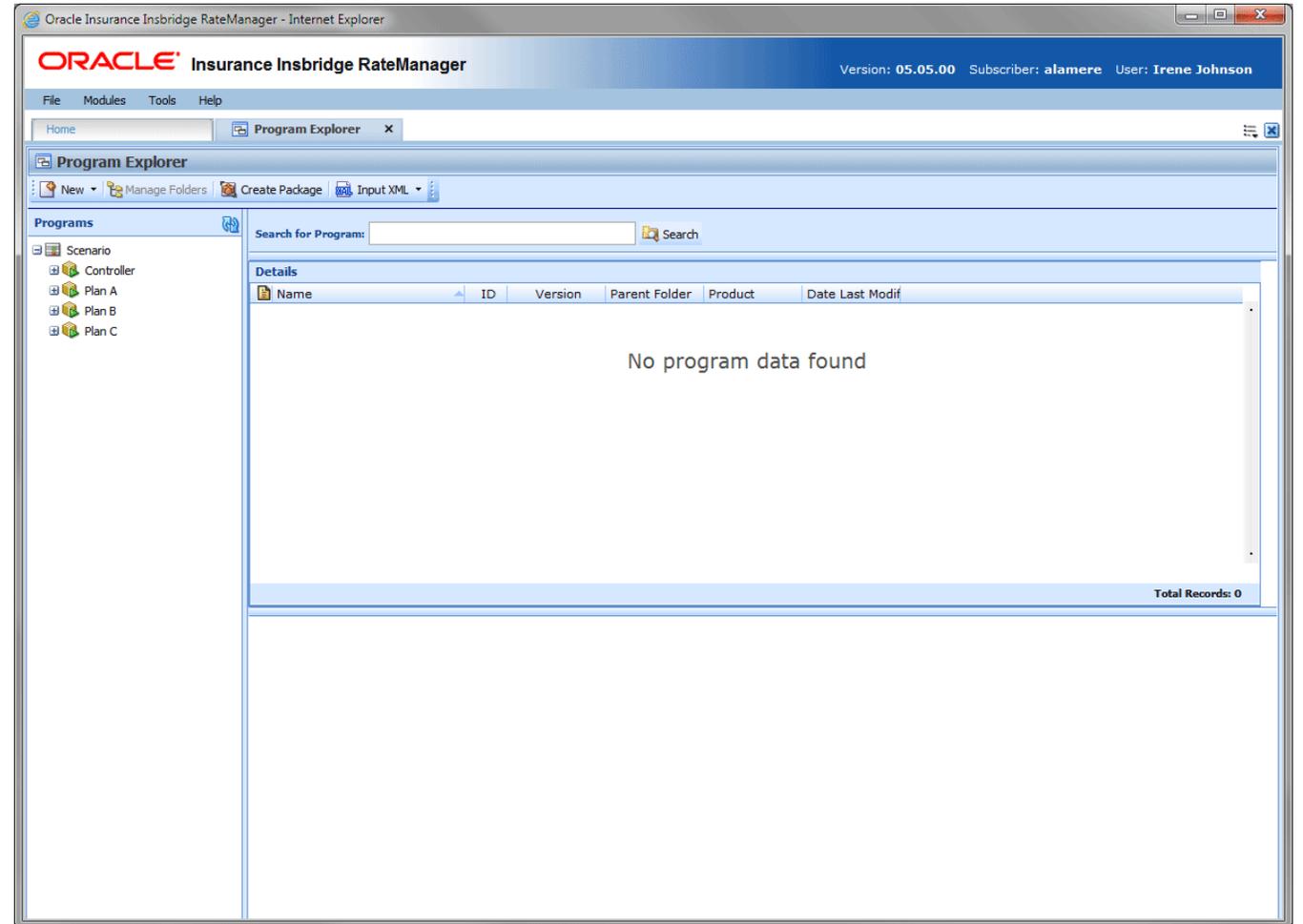
Scenario

- 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 configuration of access rights in Oracle Insurance Insbridge RateManager. It features three overlapping windows:

- Left Window (Main Application):** Shows the 'Tools' menu with 'Security' expanded to 'Group Management'.
- Middle Window (Group Management):** Displays a table of user groups. The 'Scenario Managers' group is selected, and the 'Rights' button is visible in the toolbar.
- Right Window (Group Rights):** A dialog box for configuring permissions for the 'Scenario Managers' group. It contains a tree view of system components with checkboxes for access control. The 'Scenario Admin' checkbox is checked. A red box highlights the 'Scenarios' and 'Write Access' checkboxes, which are also checked. The 'RateManager Scenario' folder is expanded to show these options.

Group	Description	Location
ADMIN	ADMIN	
RateLoaders	Create and manage rates for all areas. Product Mgmt, Testing, Package Admin, Auto, Home, Life, BOP, Package, E and O, Cyber, Sample. No locking, Auto and Home. NO DB access.	Ch...
QA	Test rates for all areas. This group has the option to send a program back to rateloaders for retooling.	Was...
RateAnalysis	Analyze the rate created and analyze the data produced.	Mia...
BA	Business analysts for all program and all areas. Recommendations for changes to be sent to rata analysis.	Ne...
Testers	For the testing of table changes in different scenarios.	Sea...
Scenario Users	This group needs access to Scenarios to test table changes.	All
Scenario Managers	For the creation, editing and deleting of scenarios. For the addition or removal of tables from scenarios.	All

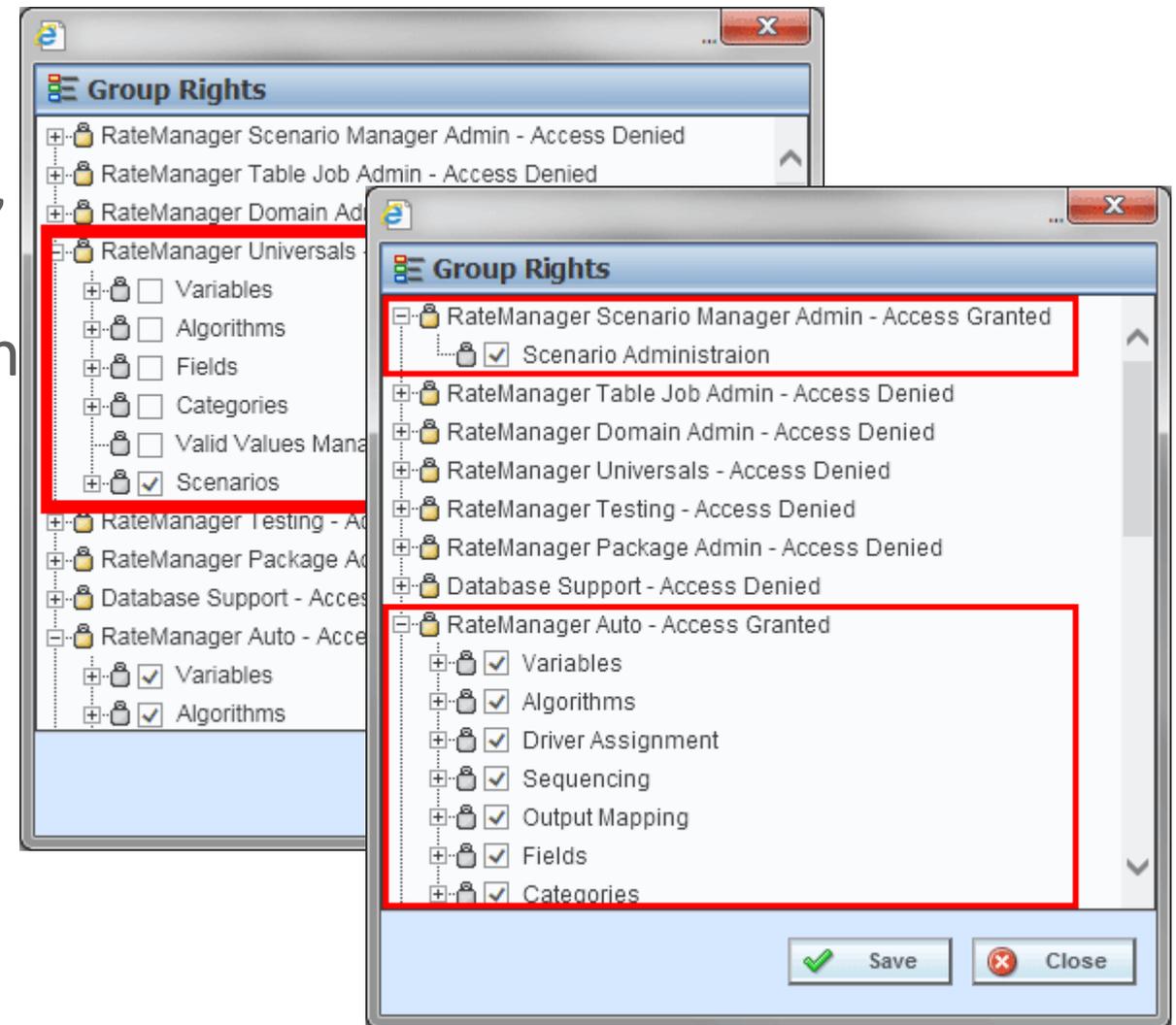
Group Rights Configuration:

- 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 (checked)
- Write Access (checked)
- RateManager Home - Access Granted



Scenario Manager Permissions

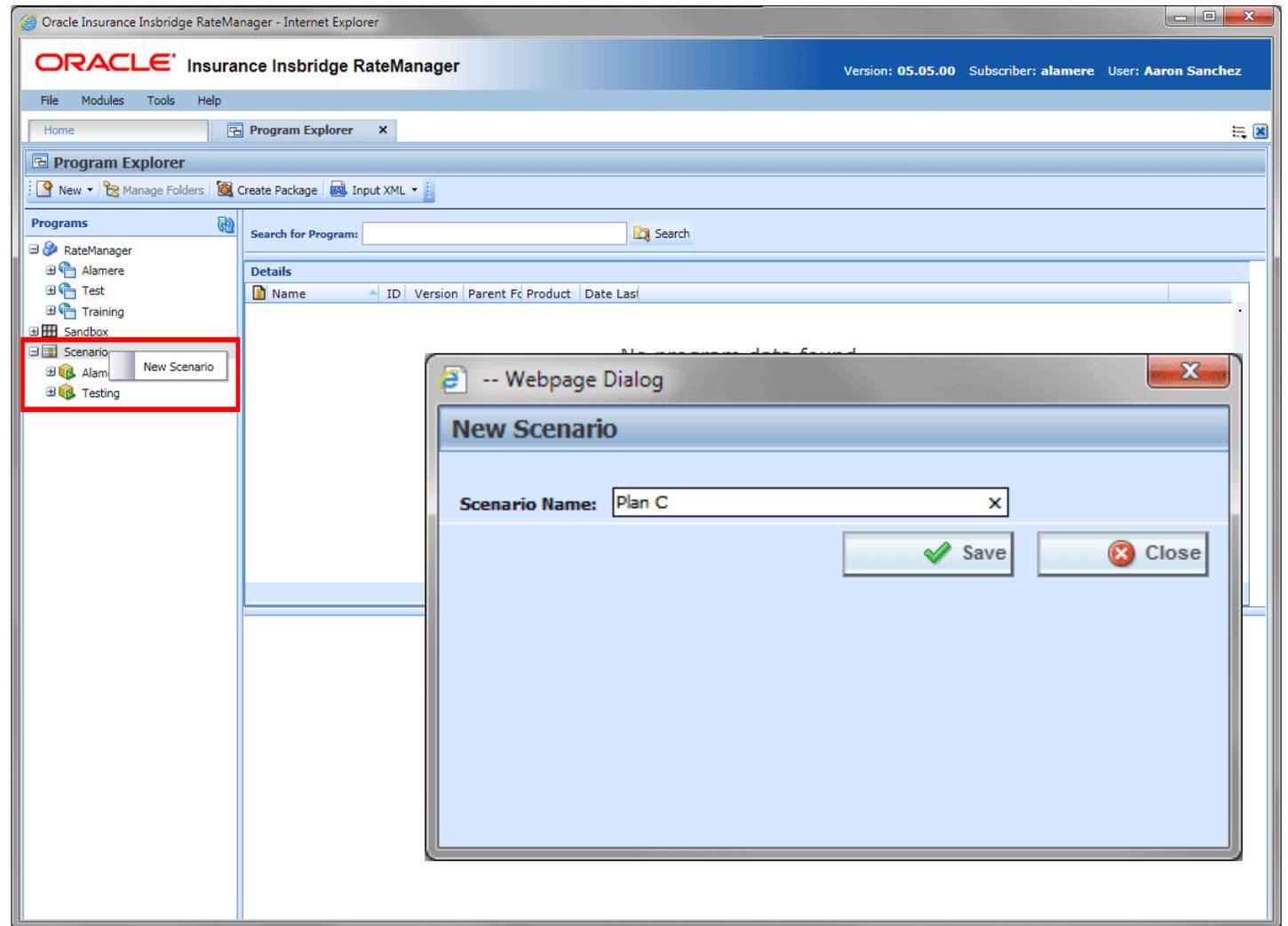
- **Set 1:** Scenario Manager Admin permissions are required to create, edit, and delete scenarios.
- **Set 2:** Product permissions for each of the products with program versions and tables that are to be included in the scenario are required.
- **Set 3:** OPTIONAL - If universal tables are to be added,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



Scenario Setup

Scenario setup is three parts

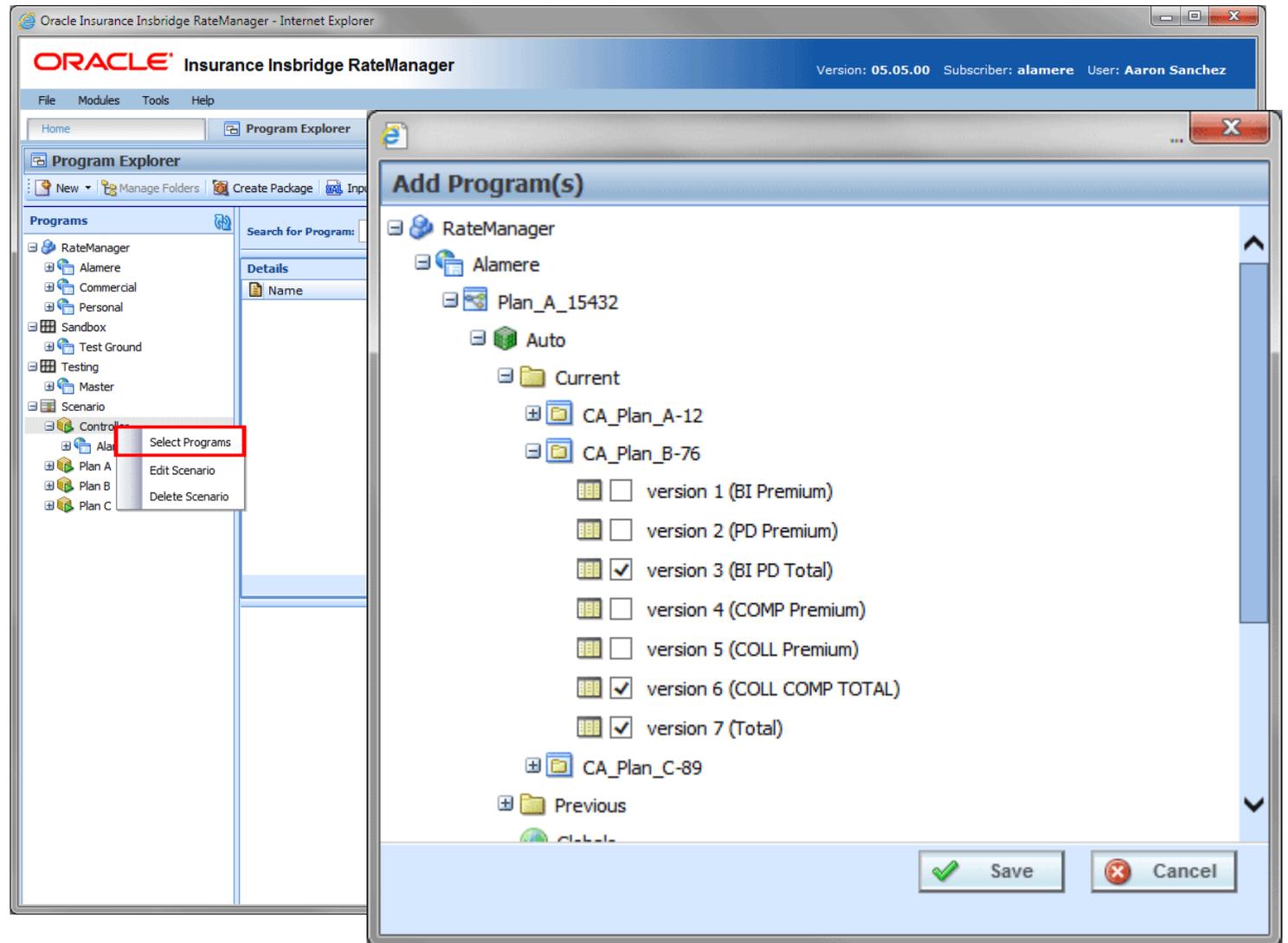
- Step 1: Create a Scenario.



Scenario Setup

Scenario setup is three parts

- Step 2: Add the Program Versions.



Scenario Setup

Scenario setup is three parts

- Step 3: Add Tables.

The screenshot displays the Oracle Primavera P6 interface. The 'Program Detail Folders' pane on the left shows a tree structure with 'Table Variables' highlighted in red. The 'Folder Detail' pane on the right shows a table of table variables. A context menu is open over the 'Market Sample Code' entry, with 'Add/Delete Scenario' highlighted in red.

Name	Revision	Element Type
Market Sample Code	1	Table (1)
Plan A Factor Code P	1	Table (8)
Plan A		Table (8)
Points		Table (11)
Rate		Table (2)
Rate		Table (2)

Table Variable Report

Program Name:	Umbre
Element Type:	Table V
Variable Revision:	1
Variable Request ID:	151
Working Category:	Believ

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

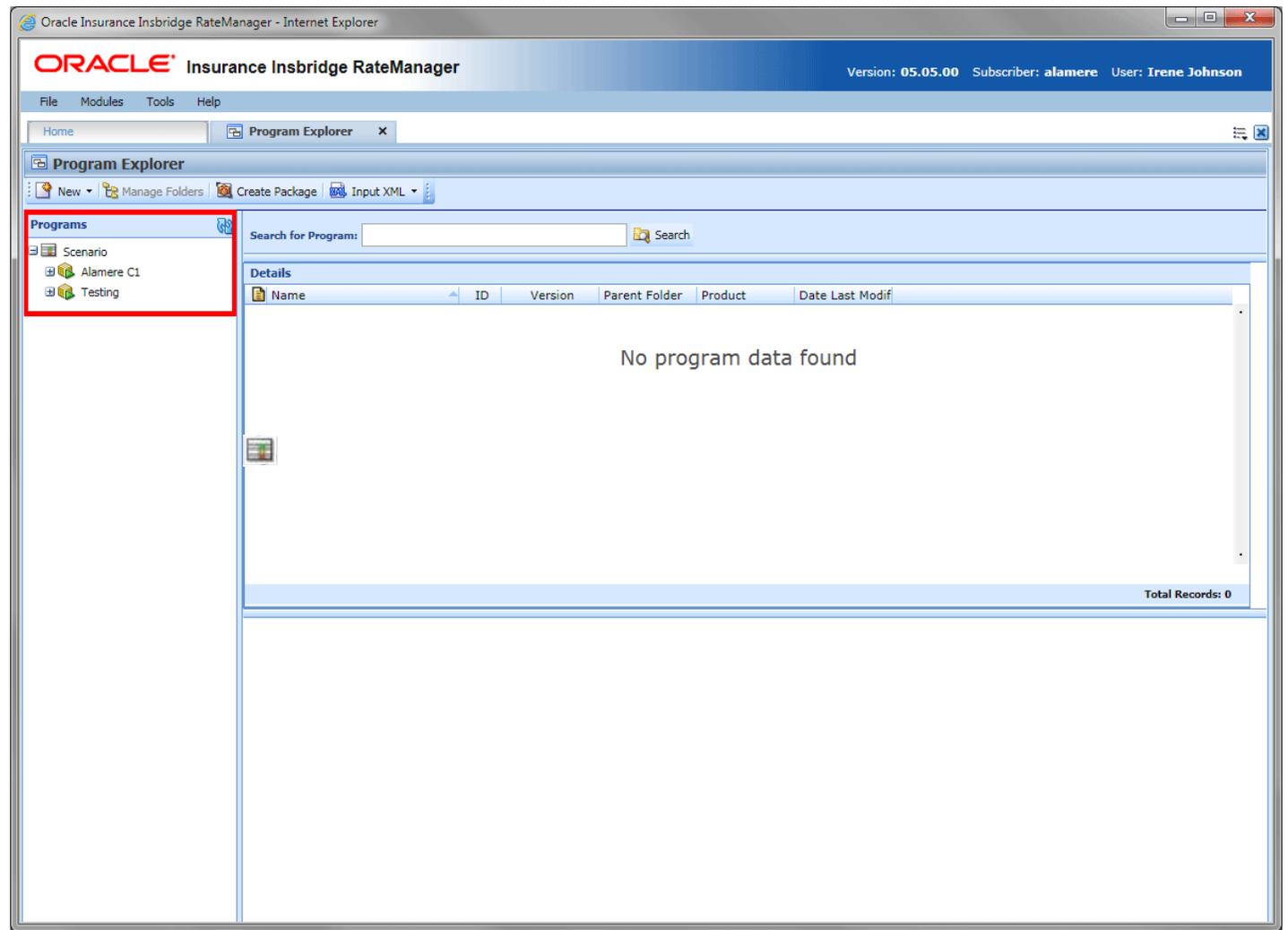
The screenshot shows the Oracle Insurance Inbridge RateManager web application. The browser title is "Oracle Insurance Inbridge RateManager - Internet Explorer". The application header includes the Oracle logo, the product name "Insurance Inbridge RateManager", and user information: "Subscriber: alamere User: Irene Johnson". The main interface is divided into several sections:

- Program Explorer:** A tree view on the left shows the hierarchy: Scenario > Alamere C1 > Alamere > Personal > Auto > California > CA_Auto_1. Below this, a list of months from 01 - Jan to 12 - Dec is visible.
- Program Version Details:** A table with columns: Name, ID, Version, Version Name, Lock, Parent Folder, Product, Date Last Modified, Last Packaged On, and Version Folder. It contains three rows for "CA_Auto_1" with IDs 623458646, versions 1, 2, and 3, and various version names and dates.
- CA_Auto_1 Details:** A section below the table showing program version information: "Program Version: 1", "No of Program Versions: 8", "Version Name: Jan-Feb", "Versioning Data Modified: November 29, 2016 2:13 PM", and "Date Last Modified: November 29, 2016 2:15 PM".
- Program Versioning:** A small table at the bottom with columns: Row #, Program Versioning, Effective Date, and Effective Date. It shows a row with "data" and comparison operators ">=" and "<=".

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

Oracle Insurance Insubridge RateManager - Internet Explorer

ORACLE Insurance Insubridge RateManager Subscriber: alamere User: Irene Johnson

File Modules Tools Help

Home Program Explorer 1 - Alamere C1 - ...

Alamere C1 > Auto > Personal > California > CA_Auto_1 - Version 1 (Jan-Feb)

New Sequencing Output Mapping Create Package Test Program Notes Refresh

Program Detail Folders

- Globals
- Table Variables
- Locals
- Table Variables

Search: Search Current Folder Only Activated Revisions Category Filter: All

Folder Detail

Name	Revision	Element Type	Data Type	Category	Folder	Date Last Modified
Action Count	1	Table (1)	Integer	Policy	Table Variables	Dec 01 2016, 12:27 PM
Deductions Factor Accident Forgive	1	Table (1)	Decimal	Vehicle	Table Variables	Jun 21 2016, 11:10 AM
Plan 800 Code	1	Table (1)	String	Policy	Table Variables	Dec 14 2016, 04:43 PM
Total Criminal Counts Local	1	Table (1)	Integer	Criminal	Table Variables	Nov 19 2015, 06:30 PM

Page Size: 25 per page Page 1 of 1 (Total Records: 4)

Table Variable Report

Program Name: CA_Auto_1
Element Type: Table Variable
Variable Revision: 1
Variable Request ID: 338
Working Category: Policy
Limit: 500 Data Rows

	Variable		CRITERIA		
	Plan 800 Code	ZIP_Plan_800	Population	Age	Income Per Household
	type: String default: NOT_FOUND	type: Integer condition: [=]	type: Integer condition: [=]	type: Decimal condition: [=]	type: Decimal 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 Insnbridge RateManager web application. The breadcrumb navigation shows the path: **Alamere C1 > Auto > Personal > California > CA_Auto_1 - Version 1 (Jan-Feb)**. The interface includes a search bar, a table of folder details, and a table variable report.

Folder Detail Table:

Name	Revision	Element Type	Data Type	Category	Folder	Date Last Modified
Action Count	1	Table (1)	Integer	Policy	Table Variables	Dec 01 2016, 12:27 PM
Deductions Factor Accident Forgive	1	Table (1)	Decimal	Vehicle	Table Variables	Jun 21 2016, 11:10 AM
Plan 800 Code	1	Table (1)	String	Policy	Table Variables	Dec 14 2016, 04:43 PM
Total Criminal Counts Local	1	Table (1)	Integer	Criminal	Table Variables	Nov 19 2015, 06:30 PM

Table Variable Report:

Program Name: CA_Auto_1
Element Type: Table Variable
Variable Revision: 1
Variable Request ID: 338
Working Category: Policy

Limit: 500 Data Rows

	Variable		CRITERIA		
	Plan 800 Code	ZIP_Plan_800	Population	Age	Income Per Household
	type: String default: NOT_FOUND	type: Integer condition: [=]	type: Integer condition: [=]	type: Decimal condition: [=]	type: Decimal 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



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. The browser title is "Oracle Insurance Insbridge RateManager - Internet Explorer". The page header includes the Oracle logo, the application name "Insurance Insbridge RateManager", and user information "Subscriber: alamere User: Mary Elliott". The navigation bar shows "File", "Modules", "Tools", and "Help". The breadcrumb trail is "Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1". The main content area is divided into several sections:

- Algorithm Details:** Shows "Algorithm Name: Coverage Forms", "Revision: 1", "Advanced Options: OFF", and "Dynamic Category: OFF". It also includes a "Working Category (Loop On): Policy" dropdown and a "Filter Policy Where:" field with "Select Filter Rule" and "Clear" buttons.
- Steps:** A table showing the current step configuration:

Steps	Algorithm Details	Available Variables, Functions, and Constants
Step 1	Current Step: 2	Functions - Create Category Instance
Step 2	Step Type: Arithmetic	<Select Category>
- Next Step:** A dropdown menu set to "DONE".
- Arithmetic Step Configuration:** A table defining the calculation:

Coverage_Surcharge	equals	
Coverage Code	plus	
Coverage Points Base Rate		
- Decimal Precision:** A dropdown menu set to "No Round".
- Algorithm Report:** A summary of the algorithm execution:

Algorithm Report

Program Name : CA_Auto_1
Algorithm Name : Coverage Forms
Algorithm Revision : 1
Working Category : Coverage

Step 1
Step Type: Arithmetic

Results of Step 1 [equals] -No Input
Round to 2 place(s) then [Step 2]

Step 2
Step Type: Arithmetic

Coverage_Surcharge [equals] Coverage Code
[plus] Coverage Points Base Rate
No Round then [DONE]

The status bar at the bottom indicates "Name: Coverage Forms" and "Task: Editing Algorithm".

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

The screenshot displays the Oracle Insurance Insbridge RateManager application. The title bar reads "ORACLE Insurance Insbridge RateManager". The menu bar includes "File", "Modules", "Tools", and "Help". The breadcrumb navigation shows "Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1". The toolbar contains icons for "Save", "New Step", "Edit Step", "Delete Step", and "Delete".

The main interface has two tabs: "Steps" and "Algorithm Details". The "Algorithm Name" field is set to "Coverage Forms" and the "Working Category (Loop On)" is set to "Policy". Below this, there is a "Filter Policy Where:" section. The "Steps" tab shows a table with two steps:

Steps	Algorithm Details
Step 1	Current Step: 2
Step 2	Step Type: Arithmetic

The "Next Step" is set to "DONE". Below the steps, there is a table for defining arithmetic operations:

Coverage_Surcharge	equals
Coverage Code	plus
Coverage Points Base Rate	

The "Decimal Precision" is set to "No Round". On the right side, a dropdown menu is open, showing a list of functions. The function "Functions - Create Category Instance" is highlighted with a red box. Other visible functions include "Functions - Global Versioning", "Functions - Library Callouts", "Functions - Program Callouts", "message templates", "System Level Constants", "Domain Constants", "Step Variables", "Policy Fields", "Policy Variables", "Policy Results", "Coverage Fields", "Coverage Variables", "Coverage Results", "fv Coverage Code", "fv Coverage Code Base Rate", "fv Coverage Points Base Rate", "fv Daily Activities", "fv Deductable", "fv Indemnity", and "fv Liability Code".

Creating a Category Instance

- Select the category

The screenshot displays the Oracle Insurance Insubridge RateManager interface. The main window shows the 'Coverage Forms' algorithm configuration for 'CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1'. The 'Working Category (Loop On)' is set to 'Policy'. A 'New Category Instance' dialog box is open in the foreground, showing a tree view of categories: Policy, Location, Classification, Driver, Vehicle, Driver-Vehicle, and Coverage. The 'Policy' category is selected. The dialog box has 'Ok' and 'Cancel' buttons at the bottom.

Oracle Insurance Insubridge RateManager
Subscriber: alamere User: Mary Elliott

File Modules Tools Help

Home Program Explorer CA_Auto_1 - Version... Coverage Forms ...

Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1

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

Algorithm Name: Coverage Forms Revision: 1 Advanced Options: OFF Dynamic Category: OFF

Working Category (Loop On): Policy Browse

Filter Policy Where: Select Filter Rule Clear

Steps	Algorithm Details	Available Variables, Functions, and Constants
Step 1	Current Step: 2	Functions - Create Category Instance
Step 2	Step Type: Arithmetic	<Select Category>

Algorithm Report

Program Name : CA
Algorithm Name : Co
Algorithm Revision : 1
Working Category: Co

Step 1
Step Type: Arithmetic

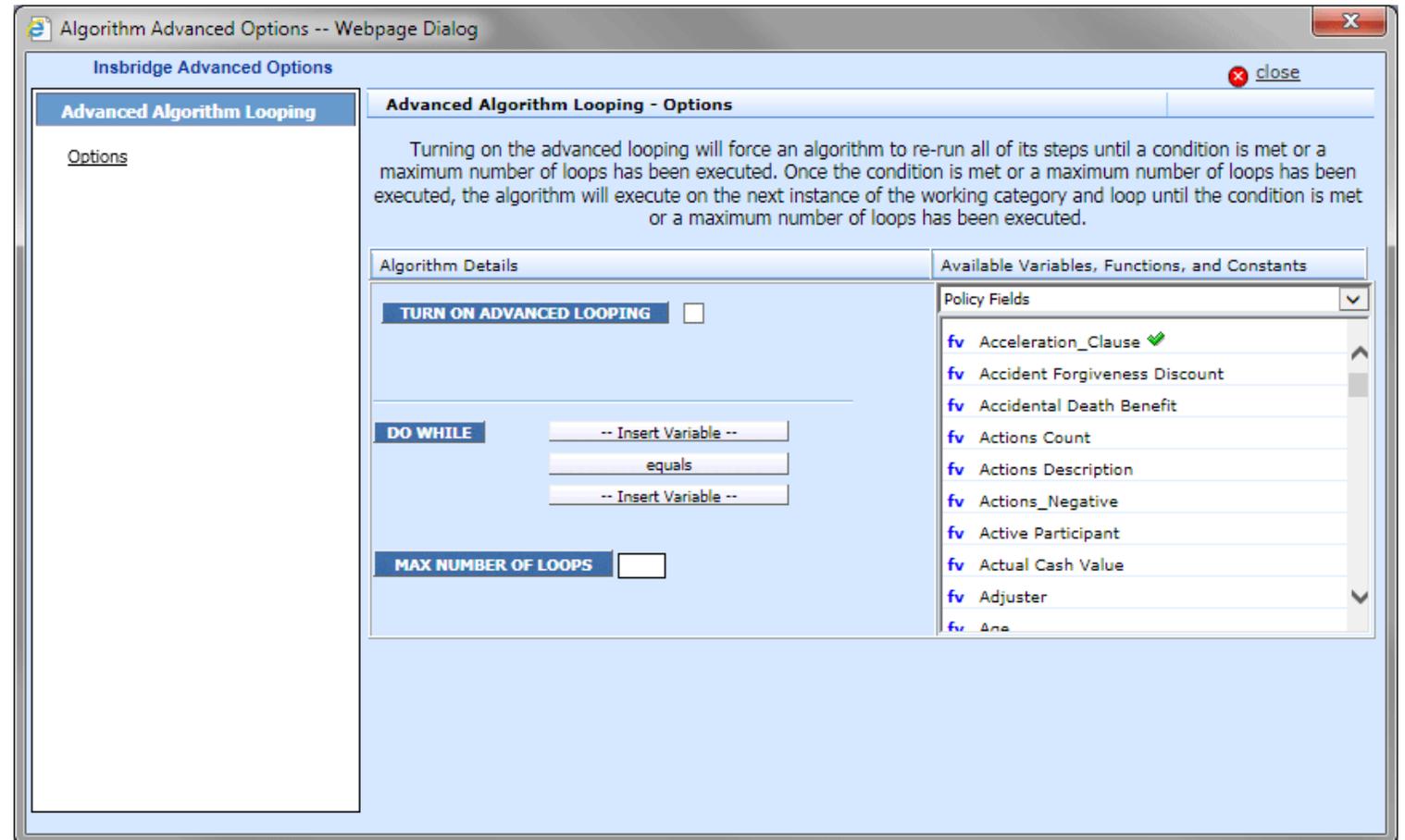
Step 2
Step Type: Arithmetic

Name: Coverage Forms **Task:** Editing Algorithm

Ok Cancel

Creating a Category Instance

- Add optional Do While Looping



Creating a Category Instance

- Add optional Mapping

The screenshot displays the Oracle Insurance Insbridge RateManager application. The main window title is "ORACLE Insurance Insbridge RateManager". The menu bar includes "File", "Modules", "Tools", and "Help". The breadcrumb navigation shows "Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1". The toolbar contains icons for "Save", "New Step", "Edit Step", "Delete Step", "Delete Term", "Change Step Order", and "Advanced Option".

The "Algorithm Name" is set to "Coverage Forms" and the "Working Category (Loop On)" is set to "Policy". Below these fields is a "Filter Policy Where:" section. The "Steps" table shows:

Steps	Algorithm Details
Step 1	Current Step: 2
Step 2	Step Type: Create Category Instance

The "Next Step:" is set to "DONE". A "Location" field is highlighted in pink. Below it, a "USE FIELD MAPPING:" section has a dropdown menu with "-- None --" selected, which is highlighted with a red box.

The right-hand pane shows a list of functions and variables. The "Functions - Create Category Instance" and "Category Instance Mappings" items are highlighted with a red box. The list includes:

- 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

Below this list is a scrollable area with the following items:

- 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 Inbridge RateManager interface. The main window title is "ORACLE Insurance Inbridge RateManager". The menu bar includes "File", "Modules", "Tools", and "Help". The breadcrumb navigation shows "Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1". The toolbar contains icons for "Save", "New Step", "Edit Step", "Delete Step", "Delete Term", "Change Step Order", and "Advanced Options".

Configuration fields include:
Algorithm Name: Coverage Forms
Revision: 1
Advanced Options: OFF
Dynamic Category: OF
Working Category (Loop On): Policy
Filter Policy Where: [checked] Select Filter Rule [x] Clear

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	-- Insert Variable -- equals	Current System Date
	THE COUNT OF	Current Program Version
	-- Enter Variable --	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

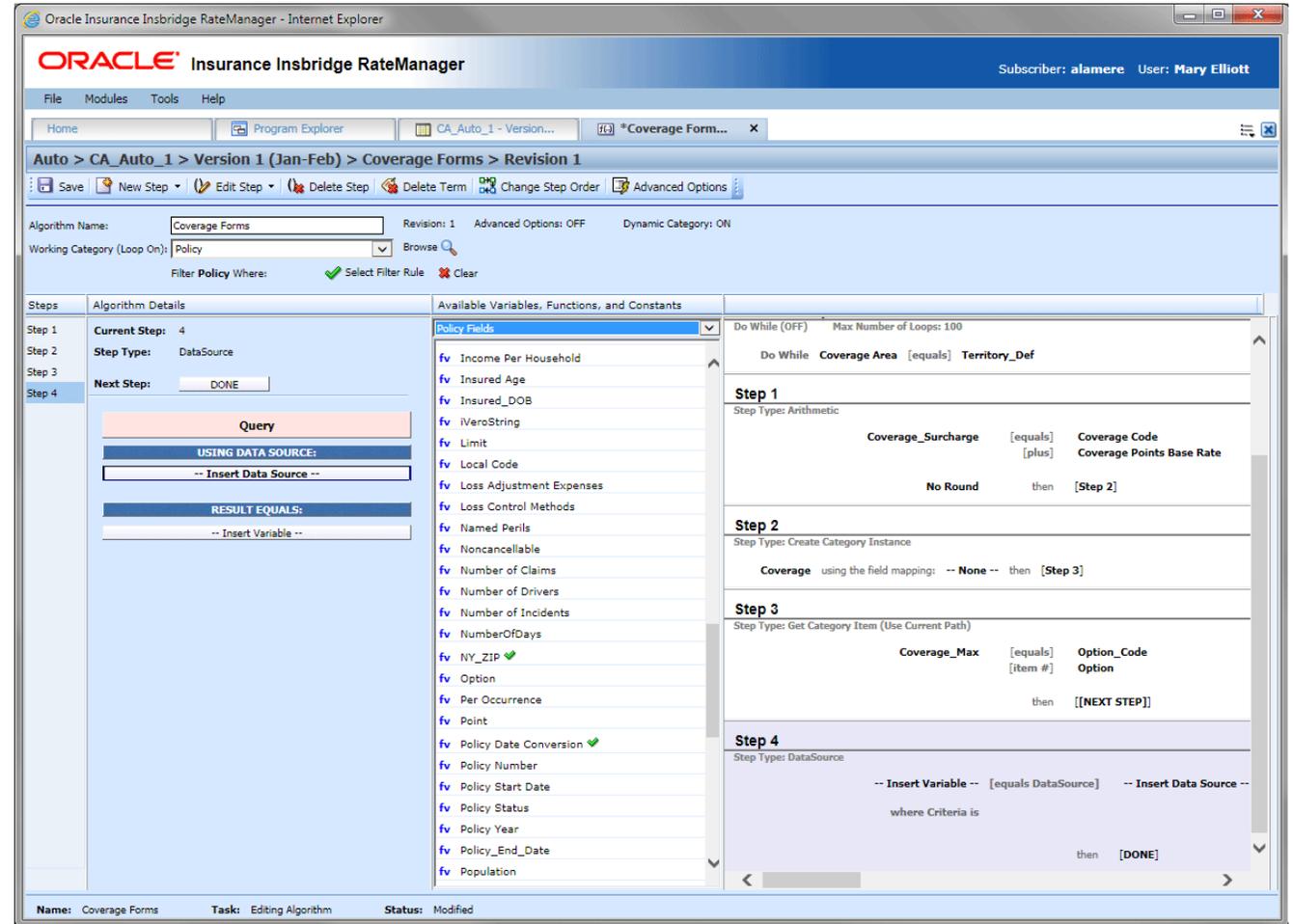
Filtered Table Data Export

- 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.

The screenshot displays the Oracle Insurance Inbridge RateManager web application. The main window shows the configuration for a new step in an algorithm. The breadcrumb navigation is "Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1". The "New Step" dropdown menu is open, and the "Query" option is selected, which has opened a "Data Source" dialog box. The "Dynamic Category" checkbox is checked. The "Available Variables, Functions, and Constants" list includes fields like "Income Per Household", "Insured Age", "Insured_DOB", and "Policy Number". The "Algorithm Report" on the right shows the current configuration: Program Name: CA_Auto_1, Algorithm Name: Coverage Forms, Algorithm Revision: 1, Working Category: Policy. The "Advanced Options" section shows "Do While (OFF)" and "Max Number of Loops: 100". The "Step 1" section shows an arithmetic step with the formula: Coverage_Surcharge [equals] Coverage Code [plus] Coverage Points Base Rate, followed by "No Round" and "then [Step 2]". The "Step 2" section shows a "Create Category Instance" step with the formula: Coverage using the field mapping: -- None -- then [Step 3]. The "Step 3" section shows a "Get Category Item (Use Current Path)" step with the formula: Coverage_Max [equals] Option_Code [item #] Option then [[NEXT STEP]].

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.

Oracle Insurance Insbridge RateManager - Internet Explorer

ORACLE Insurance Insbridge RateManager

Subscriber: alamere User: Mary Elliott

File Modules Tools Help

Home Program Explorer CA_Auto_1 - Version... *Coverage Form... x

Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Coverage Forms > Revision 1

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

Algorithm Name: Coverage Forms Revision: 1 Advanced Options: OFF Dynamic Category: ON

Working Category (Loop On): Policy Brows Filter Policy Where: Select Filter Rule

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

Steps

Step	Algorithm Details
Step 1	Current Step: 4
Step 2	Step Type: DataSource
Step 3	Next Step: DONE
Step 4	

Query

USING DATA SOURCE:
-- Insert Data Source --

RESULT EQUALS:
-- Insert Variable --

fv Insured Age
fv Insured_DOB
fv iVeroString
fv Limit
fv Local Code
fv Loss Adjustment Expenses
fv Loss Control Methods
fv Named Perils
fv Noncancellable
fv Number of Claims
fv Number of Drivers
fv Number of Incidents
fv NumberOfDays
fv NY_ZIP ✓
fv Option
fv Per Occurrence
fv Point
fv Policy Date Conversion ✓
fv Policy Number
fv Policy Start Date
fv Policy Status
fv Policy Year
fv Policy_End_Date
fv Population

Do While (OFF) Max Number of Loops: 100

Do While Coverage Area [equals] Territory_Def

Step 1
Step Type: Arithmetic

Coverage_Surcharge [equals] Coverage Code
[plus] Coverage Points Base Rate

No Round then [Step 2]

Step 2
Step Type: Create Category Instance

Coverage using the field mapping: -- None -- then [Step 3]

Step 3
Step Type: Get Category Item (Use Current Path)

Coverage_Max [equals] Option_Code
[item #] Option
then [[NEXT STEP]]

Step 4
Step Type: DataSource

-- Insert Variable -- [equals DataSource] -- Insert Data Source --
where Criteria is
then [DONE]

Name: Coverage Forms Task: Editing Algorithm Status: Modified

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 Policy Center interface for configuring a data query. The breadcrumb path is "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 "Dynamic Category" is set to "ON".

The "Steps" pane shows Step 4 is the current step, with a "Next Step" button labeled "DONE". The "Algorithm Details" pane shows the "Query" configuration:

- USING DATA SOURCE:** CA_State_Definition
- RESULT EQUALS:** Preferred_Discount_Code

The "Criteria" table is populated with the following data:

#	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	=

The "Available Variables, Functions, and Constants" pane shows a list of "Policy Fields" 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.



Step Management

Step Management

- Issue

Steps within a variable could not be copied.

- Solution

Add the ability to copy one or more steps.

The screenshot displays the Oracle Insurance Insnbridge RateManager web application. The interface includes a menu bar (File, Modules, Tools, Help) and a breadcrumb trail: Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Violations > Revision 1. A toolbar contains buttons for Save, New Step, Edit Step (highlighted with a red box), Delete Step, Delete Term, Change Step Order, and Advanced Options. Below the toolbar, the 'Algorithm Name' is 'Violations' and the 'Working Category (Loop On)' is 'Driver-Vehicle'. A table on the left lists steps from Step 1 to Step 14. The 'Algorithm Report' on the right shows the following details:

- Program Name: CA_Auto_1
- Algorithm Name: Violations
- Algorithm Revision: 1
- Working Category: Driver-Vehicle

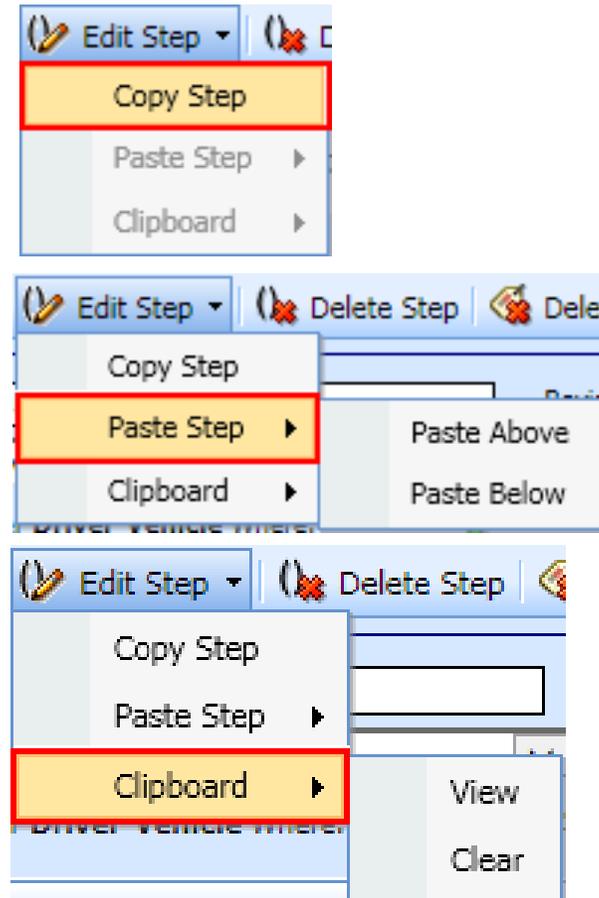
The report also shows the following steps:

- Step 1:** Step Type: Get Category Item (All Available). The report snippet shows: `Violations [equals] Violation Type Points` and `WHERE Violation Year [equals] Polic`.
- Step 2:** Step Type: Count Across Category (All Available). The report snippet shows: `At_Fault_Count [equals] The Count (Across All) of Citati` and `then [Step 3]`.
- Step 3:** Step Type: Count Across Category (Use Current Path). The report snippet shows: `dv_Count [equals] The Count (Using Current Path) c` and `then [Step 4]`.
- Step 4:** Step Type: Clear Ranking.

The status bar at the bottom indicates: Name: Violations, Task: Editing Algorithm, Status: Saved, Last Saved: Jul 12 2017 9:10AM.

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 interface. The title bar reads "ORACLE Insurance Insbridge RateManager". The menu bar includes "File", "Modules", "Tools", and "Help". The breadcrumb path is "Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Violations > Revision 1". The toolbar contains "Save", "New Step", "Edit Step", "Delete Step", "Delete Term", "Change Step Order", and "Advanced Option". The "Edit Step" dropdown menu is open, showing "Copy Step", "Paste Step", and "Clipboard" options. The "Steps" list on the left has "Step 1" highlighted. The "Algorithm Details" pane shows "Current Step: 1", "Step Type: Get Category Item (All Available)", and "Next Step: DONE". The "Available Variables, Functions, and Constants" pane lists various policy fields and functions.

Steps	Algorithm Details	Available Variables, Functions, and Constants
Step 1	Current Step: 1	Policy Fields
Step 2	Step Type: Get Category Item (All Available)	fv Acceleration_Clause ✓
Step 3	Next Step: DONE	fv Accident Forgiveness Discount
Step 4		fv Accidental Death Benefit
Step 5	Violations equals	fv Actions Count
Step 6	GET CATEGORY ITEM	fv Actions Description
Step 7	Violation Type item #	fv Actions_Negative
Step 8	Points	fv Active Participant
Step 9	WHERE	fv Actual Cash Value
Step 10	Violation Year	fv Adjuster
Step 11	equals	fv Age
Step 12	Policy Year	fv Agent ID

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.

The screenshot displays the Oracle Insurance Insbridge RateManager application. The title bar reads "ORACLE Insurance Insbridge RateManager". The menu bar includes "File", "Modules", "Tools", and "Help". The breadcrumb navigation shows "Home", "Program Explorer", "CA_Auto_1 - Version...", and "*Violations [1] :...". The main window title is "Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Violations > Revision 1". The toolbar contains icons for "Save", "New Step", "Edit Step", "Delete Step", "Delete Term", "Change Step Order", and "Advanced Option".

Form fields include:
Algorithm Name: Violations
Revision: 1
Advanced Options: OFF
Dynamic Category: C
Working Category (Loop On): Driver-Vehicle
Filter Driver-Vehicle Where: Select Filter Rule Clear

Steps	Algorithm Details	Available Variables, Functions, and Constants
Step 1	Current Step: 10	Policy Fields
Step 2	Step Type: Arithmetic	fv Acceleration_Clause ✓
Step 3	Next Step: <input type="text" value="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	Decimal Precision: <input type="text" value="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.

The screenshot displays the Oracle Insurance Insbridge RateManager interface. The main window shows the 'Auto > CA_Auto_1 > Version 1 (Jan-Feb) > Violations > Revision 1' path. A menu is open over the 'Edit Step' button, with options: 'Copy Step', 'Paste Step', 'Clipboard', 'View', and 'Clear'. The 'Clipboard' option is highlighted. Below the main window, a 'Clipboard -- Webpage Dialog' is open, showing 'Clipboard Contents' with three steps:

- Step 1**
Step Type: Get Category Item (All Available)
Violations [equals] Violation Type
[item #]
WHERE Violation Year [equals] Policy Year
then [Step 2]
- Step 2**
Step Type: Count Across Category (All Available)
At_Fault_Count [equals] The Count (Across All) of Citations
then [Step 3]
- Step 6**
Step Type: IF
IF Violation Type [equals] Citations then [Step 7] else [DONE]

At the bottom right of the dialog, a confirmation box asks 'Would you like to clear the clipboard?' with 'Yes' and 'No' buttons. The 'Yes' button is selected.



Filter Rules and Validation Rules Results

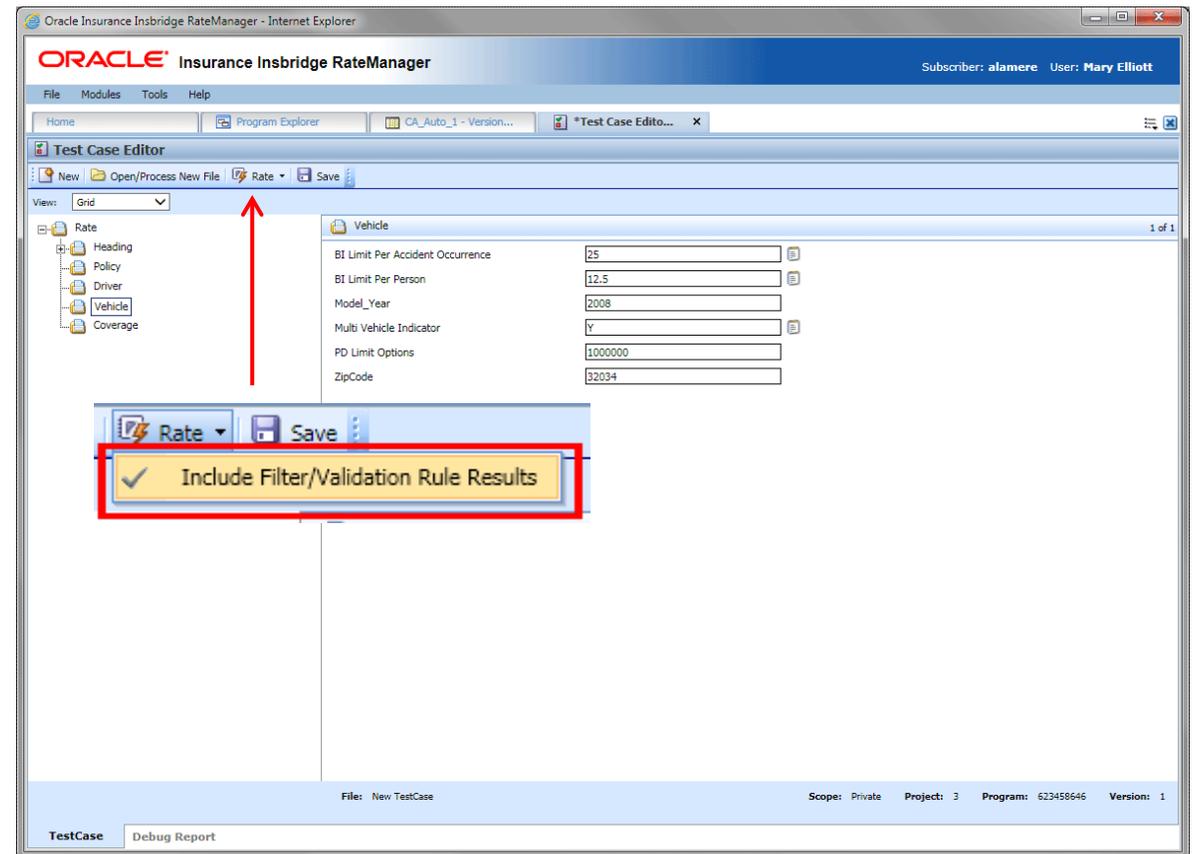
Filter Rules and Validation Rules Results

- 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.

The screenshot displays the Oracle Insurance Insbridge RateManager application. The title bar shows the Oracle logo and the text 'Insurance Insbridge RateManager' with the version '05.05.00'. The menu bar includes 'File', 'Modules', 'Tools', and 'Help'. The window title bar shows 'Home', 'Program Explorer', 'CA_Auto_1 - Version...', and '*Test Case Edito...'. The main window is titled 'Test Case Editor' and features a toolbar with 'New', 'Open/Process New File', 'Rate', and 'Save'. Below the toolbar, a 'View:' dropdown is set to 'Grid'. A red box highlights a checkbox labeled 'Include Filter/Validation Rule Results', which is currently checked. The interface is divided into two panes: 'Rate' on the left and 'Policy' on the right. The 'Rate' pane shows a tree view with 'Heading', 'Policy', 'Driver', 'Vehicle', and 'Coverage'. The 'Policy' pane contains a form with the following fields: 'Effective Date' (2018/01/01), 'Expiration Date' (2019/01/01), 'Homeowner' (Y), and 'Insured Age' (44).



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

ORACLE®