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Insbridge Enterprise Rating

SoftRater Server User Guide

Release 5.6

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Oracle Insurance Insbridge Enterprise Rating SoftRater Server User Guide

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CONTENTS

PREFACE VIII
Audience viii
Related Documents viii
Conventions ix
System Requirements ix
Manual History ix

CHAPTER 1

SOFTRATER SERVER 10
Clustered Environments 10
Shared Information in an IBSS Cluster 11
Unique Information in an IBSS Cluster 12
Options Available to All or One in an IBSS Cluster 12
IBSS Clusters 13
Ports Used by WebLogic, JBoss, and WebSphere 13
WebSphere 14
JBoss 15
WebLogic 16

CHAPTER 2

IBSS HOME PAGE 17
Configuration File 18
Options 20
Setting Options 21
Editing Options 21
Deleting Options 21
Subscribers 22
Adding a Subscriber 22
Editing a Subscriber 25
Deleting a Subscriber 25
Environments 27
Adding an Environment 27
Controller Environment and Batch Rating 33
RateManager Environment 34
Editing an Environment 34
Testing an Environment 37
Deleting an Environment 38

CHAPTER 3

NODE SETUP AND CONFIGURATION 39
Node Organization 39
Adding a Node 40

Using HTTPS 41
Editing a Node 43
Testing a Node 44
Deleting a Node 45

CHAPTER 4

CONFIG 46
Engine 47
Debug 47
DB Auto Release 48
Auditing 48
Stats 48
Cache Setting 49
Logs 51
Security 52
Security Enabled 53
Change Password 54

CHAPTER 5

NODES 56
Reset Environments 57
Insbridge Connector Service 59
Services 60
Insbridge Connector Service Options 60
Setting Insbridge Connector Properties 61
Starting and Stopping Insbridge Connection Properties 68
Message Process 69
Statuses and Actions for Message Processing 70
Edit Process Configuration 72
Insbridge Task Manager 75
Viewing Task Details 77

CHAPTER 6

SOFTRATER TEST INTERFACE 78
Request Information 79
Rate Operators 80
Map Request Operators 82
Result Information 83
Rating a File Using the SoftRater Test Interface 84

CHAPTER 7

SOFTDATA TEST INTERFACE 85

CHAPTER 8

DBRUNTIME 86
Request Information 87

Result Information 88
Running a Rate Using DBRuntime 88

CHAPTER 9

SOFTLIBRARIES 89
Adding SoftLibraries 91
Arguments 96
GetHelpText 97
RequestXML 97
ResponseXML 98
Ping 98
GetLog 99
Test 99
Editing SoftLibraries 100
Deleting SoftLibraries 101
Sample for Sending a Message to Call a SoftLibrary 102

CHAPTER 10

NODE MANAGEMENT 103
Node Information Page 103
Debug Module Tracing 104
Node Functionality 107
Reset Environments 108
Cache 110
Services 112
Logs 114

SUPPORT

CONTACTING SUPPORT 117

GLOSSARY

GLOSSARY TERMS 118

INDEX

INDEX 123

LIST OF FIGURES

FIGURE 1 IBSS CLUSTER 10
FIGURE 2 SHARED INFORMATION IN AN IBSS CLUSTER 11
FIGURE 3 SOFTRATER SERVER FOR WEBSPHERE 14
FIGURE 4 SOFTRATER SERVER FOR JBOSS 15
FIGURE 5 SOFTRATER SERVER FOR WEBLOGIC 16
FIGURE 6 SOFTRATER PAGE 17
FIGURE 7 INSBRIDGE PAGE CONFIGURATION FILE PATH 18
FIGURE 8 CONFIGURATION FILE NEW WINDOW 19
FIGURE 9 OPTIONS ON THE IBSS HOME PAGE 20
FIGURE 10 ENTERING OPTIONS 21
FIGURE 11 ADDING SUBSCRIBER LINKS 23
FIGURE 12 ADDING A NEW SUBSCRIBER 23
FIGURE 13 SUBSCRIBER LIST 24
FIGURE 14 EDITING SUBSCRIBER 25
FIGURE 15 DELETING A SUBSCRIBER 26
FIGURE 16 CONFIRM DELETED SUBSCRIBER 26
FIGURE 17 ADD ENVIRONMENT 27
FIGURE 18 ENVIRONMENT SETUP 30
FIGURE 19 CREATING A JNDI ENVIRONMENT 32
FIGURE 20 ADDING A CONTROLLER ENVIRONMENT 33
FIGURE 21 EDIT ENVIRONMENT 35
FIGURE 22 EDITING AN ENVIRONMENT 36
FIGURE 23 SUCCESSFUL TEST CONNECTION 37
FIGURE 24 FAILED TEST CONNECTION BAD LOGIN INFORMATION 37
FIGURE 25 FAILED TEST CONNECTION NOT SAVED 38
FIGURE 26 DELETING AN ENVIRONMENT 38
FIGURE 27 CLUSTER/NODE STRUCTURE 39
FIGURE 28 ADDING A NODE 40
FIGURE 29 ADDING A NODE 41
FIGURE 30 NODE ERROR 42
FIGURE 31 EDITING A NODE 43
FIGURE 32 SUCCESSFUL NODE CONNECTION 44
FIGURE 33 DOWN NODE MESSAGE 44
FIGURE 34 DELETING A NODE 45
FIGURE 35 ENGINE PAGE 47
FIGURE 36 LOGS PAGE 51
FIGURE 37 SECURITY DISABLED 52
FIGURE 38 SECURITY ENABLED IN IBSS 53
FIGURE 39 LOGGING OUT OF IBSS 53
FIGURE 40 CHANGING PASSWORD 54
FIGURE 41 NODE MANAGEMENT WINDOW 56
FIGURE 42 RESETTING A NODE 57
FIGURE 43 CONFIRMING A NODE RESET 58
FIGURE 44 SUCCESSFUL RESET 58
FIGURE 45 INSBRIDGE CONNECTOR SERVICE 59
FIGURE 46 NODES SERVICES 60
FIGURE 47 PROPERTIES OPTION ON SERVICES PAGE 61
FIGURE 48 INSBRIDGE CONNECTION PROPERTIES 62
FIGURE 49 INSBRIDGE CONNECTION PROPERTIES FOR EMAIL 64
FIGURE 50 EXAMPLE INSBRIDGE CONNECTION PROPERTIES FOR WEBLOGIC 66
FIGURE 51 SUCCESSFUL INSBRIDGE CONNECTION PROPERTIES SETUP 67
FIGURE 52 FAILED INSBRIDGE CONNECTION PROPERTIES SETUP 67
FIGURE 53 SERVICES PAGE WITH SERVICES STARTED 68

FIGURE 54 BATCH MESSAGE INFORMATION 69
FIGURE 55 EDIT PROCESS CONFIGURATION SERVICES 72
FIGURE 56 SOFTRATER BATCH ENGINE ADMIN EMAIL 73
FIGURE 57 EDIT PROCESS CONFIGURATION FOR BATCH 74
FIGURE 58 SETTING TASK MANAGER PROPERTIES 75
FIGURE 59 TASK MANAGER 76
FIGURE 60 VIEWING TASKS 77
FIGURE 61 SOFTRATER TEST INTERFACE 78
FIGURE 62 REQUEST INFORMATION AREA OF SOFTRATER TEST INTERFACE 79
FIGURE 63 OPTIONAL RATE OPERATORS 80
FIGURE 64 CUSTOM XML MAP REQUEST OPERATORS 82
FIGURE 65 TEST RESULTS 84
FIGURE 66 SOFTDATA TEST INTERFACE 85
FIGURE 67 SOFTDATA TEST INTERFACE 86
FIGURE 68 SOFTLIBRARIES MAIN MENU 89
FIGURE 69 SOFTLIBRARY IMPLEMENTATION INFORMATION 90
FIGURE 70 SOFTLIBRARIES MAIN SCREEN 92
FIGURE 71 SOFTLIBRARY NATIVE TYPE 93
FIGURE 72 SOFTLIBRARY LOOKUP TYPE 94
FIGURE 73 EDITING ARGUMENTS 96
FIGURE 74 GETHELPTEXT WINDOW 97
FIGURE 75 REQUESTXML WINDOW 97
FIGURE 76 RESPONSEXML WINDOW 98
FIGURE 77 PING WINDOW 98
FIGURE 78 GETLOG WINDOW 99
FIGURE 79 TEST WINDOW – REQUEST 99
FIGURE 80 COMPLETED SOFTLIBRARY 100
FIGURE 81 NODE MANAGEMENT WINDOW 103
FIGURE 82 DEBUG MODULE TRACING 105
FIGURE 83 RESETTING A NODE 108
FIGURE 84 CONFIRMING A NODE RESET 109
FIGURE 85 SUCCESSFUL REST 109
FIGURE 86 PROGRAM CACHE 110
FIGURE 87 SERVICES 112
FIGURE 88 ERROR LOGS PAGE 114
FIGURE 89 AUDIT LOGS 115
FIGURE 90 LOGS STORED ON THE SERVER 116

PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating SoftRater Server User Guide.* This manual describes the settings and options of Oracle Insurance Insbridge Enterprise Rating SoftRater Server (IBSS). IBSS is the administrative tool for the SoftRater engine. The SoftRater engine is a multi-platform component within the Oracle Insurance Insbridge Enterprise Rating (Insbridge) system that executes the rules, rating, and underwriting instructions as defined by the user in Oracle Insurance Insbridge Enterprise Rating RateManager.

The SoftRater engine is an EJB component hosted in the Application Server and accessible through HTTP SOAP Proxy, and EJB – Direct JNDI interfacing. A database management system is used for content storage with support for all major DBMS vendors.

IBSS runs on:

- Oracle WebLogic (WebLogic)
- Jboss, a division of Red Hat (Jboss)
- IBM WebSphere (WebSphere)

AUDIENCE

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

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Enterprise Rating Framework Administrator User Guide.
- The Oracle Insurance Insbridge Enterprise Rating SoftRater 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 screen, or text that you enter.

SYSTEM REQUIREMENTS

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

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-729-21	V 4.7	November 2013	UI Update
2nd Edition	P01-729-22	V 4.8	September 2014	Update
3rd Edition	P01-729-23	V 4.9	December 2014	Update
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5th Edition	P01-729-25	R 5.1	December 2015	Update Release
6th Edition	P01-729-26	R 5.2	July 2016	Update
7th Edition	P01-729-27	R 5.4	January 2017	Update
8th Edition	P01-729-28	R 5.5	September 2017	Update
9th Edition	P01-729-29	R 5.6	August 2018	Update

SOFTRATER SERVER

Oracle Insurance Insbridge Enterprise Rating SoftRater Server (IBSS) is an administrative tool used in conjunction with SoftRater for WebLogic, JBoss, or WebSphere. It allows you to:

- Configure the SoftRater engine
- Rate test files
- Execute a SoftData request
- Enter a SoftLibrary
- Manage an IBSS Clustered environment

CLUSTERED ENVIRONMENTS

IBSS allows for clustered environments. A clustered environment is where multiple instances of IBSS are created on one or more servers of the same type and share the same configuration. The benefits to a cluster are that all instances in the cluster work together to provide high availability, reliability, scalability, and increased performance.

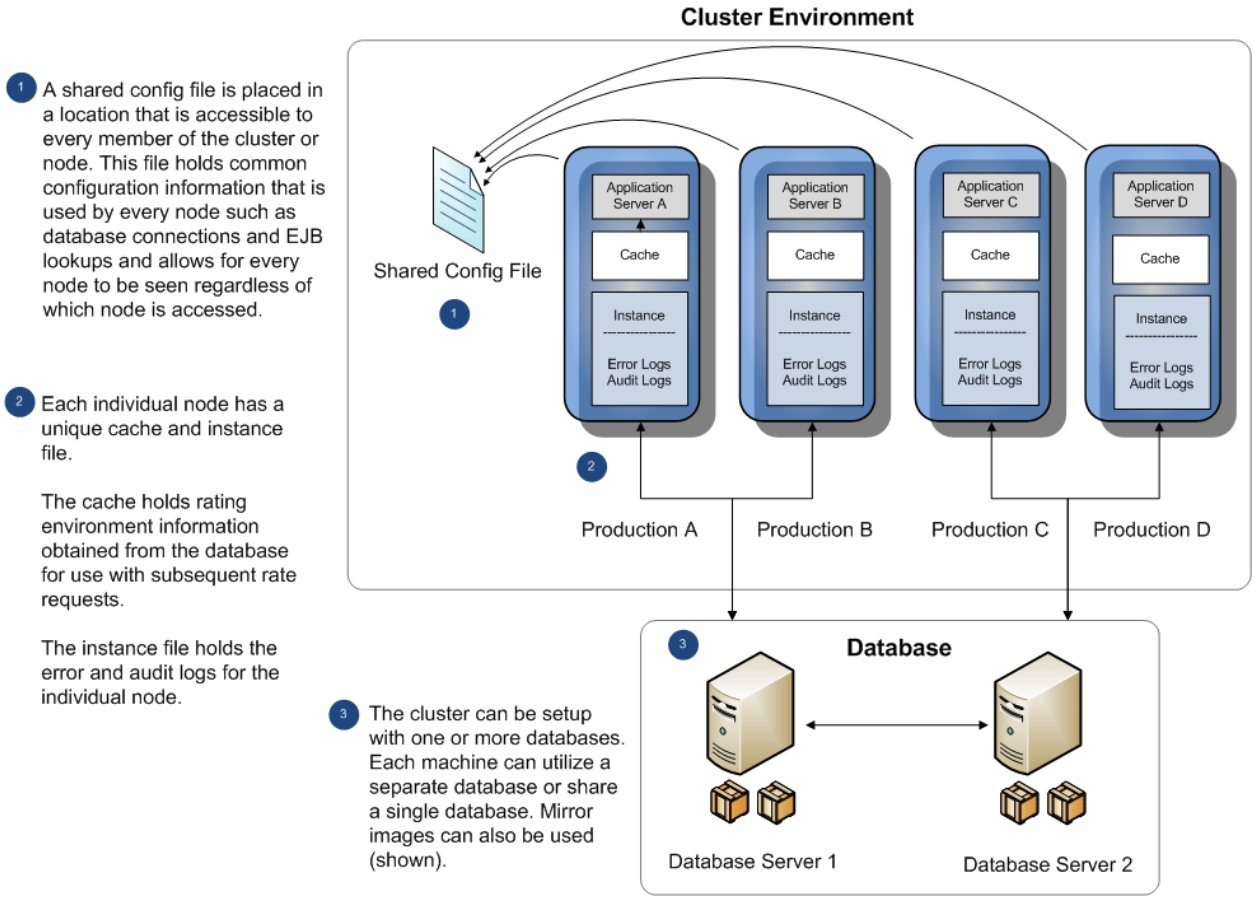


Figure 1 IBSS Cluster

Shared Information in an IBSS Cluster

Clusters in IBSS share common information and common features but each individual instance holds unique cache and log files. Services and actions such as resetting environments can be performed at the individual level or for the entire cluster. The common information includes the config.xml file, database environments, and SoftLibraries. This allows for information that is shared to be consistent throughout the IBSS cluster. For example, if you make a change to a database environment, the config.xml file gets updated. Since every IBSS instance in the cluster has access to the updated config.xml file, every instance is updated. Likewise if you make an update to a SoftLibrary, you do not need to update every IBSS instance. You can do one update. All IBSS instances in the cluster will have access to the updated SoftLibrary.

When you set up a cluster, each individual IBSS deployment is entered as a node. The node is the endpoint of the IBSS instance. Each node has an IBSS home page and can be presented on the home page of each IBSS instance. It does not matter from where you enter the environment or subscriber information. Each node shares the same configuration file so each node sees the same information.

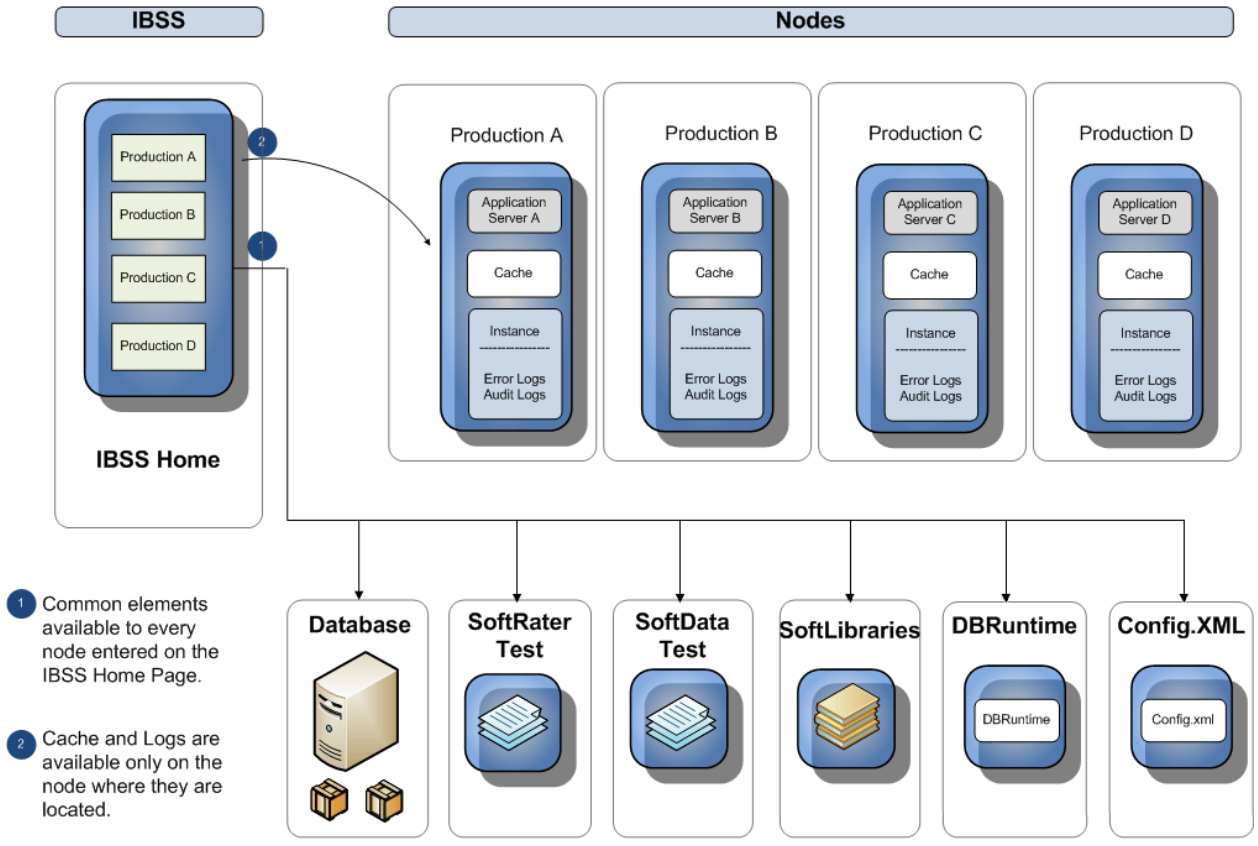


Figure 2 Shared Information in an IBSS Cluster

Once nodes are created in the IBSS cluster, SoftRater, SoftData, and DBRuntime can utilize any node for testing. For example, if you wanted to test a SoftData call on node A, you would select node A from the node option on the SoftRater Test Interface page. You would not have to enter the node A IBSS instance and perform the test from there. You can test from any node in the cluster. If you then wanted to test node B, you would select node B from the option. You would not have to enter the node B IBSS instance.

Settings for services are done at the Nodes level and apply to every node in the cluster. Settings for logs are under the Config folder and apply to every member of the cluster.

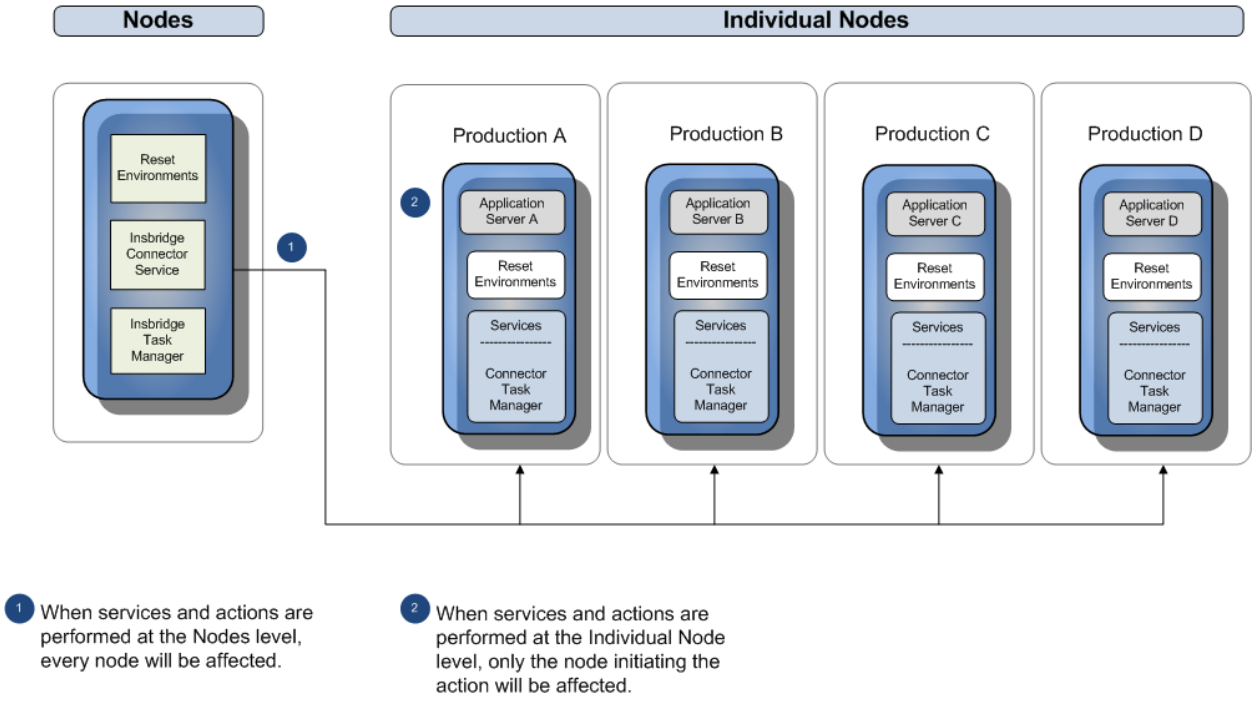
Unique Information in an IBSS Cluster

The areas that are unique to each node in the cluster are cache and log files. Cache holds the rating environment information obtained from the database. This information is used in subsequent rate requests. Cache can be purged across all members of the cluster or only for the selected node.

Another area unique to each node is Logs. The Logs file holds error and audit logs for each member of the cluster. These logs are unique to the instance and no information is shared. Individual error and audit logs can assist when debugging issues. You can see the actions performed by each IBSS instance without having to sort through logs that do not refer to the node in question.

Options Available to All or One in an IBSS Cluster

Services and actions can be performed at the individual level or for the entire cluster. Options available on the Nodes folder and on each individual node are reset environments, starting and stopping the Insbridge Connector Service, Insbridge Task Manager, and viewing messages. When services and actions are performed at the Nodes level, every node will be affected. When performed at the Individual node level, only the node initiating the action will be affected.



For example, if you reset environments from the Nodes level, cache will be cleared in every member of the cluster. If you reset environments from an individual node, only that node will have cache cleared.

IBSS Clusters

Any SoftRater for Java engine (WebLogic, WebSphere, or JBoss) can utilize clustering. The actual setup of a cluster on the application server(s) is up to the discretion of the installer, but there are a few requirements for a cluster such as each instance points to the same configuration file and that all instances must be of the same application server type. Once the cluster has been created, the installer will need to provide the server host(s) and the port(s) used along with any database information.

Creating a cluster in IBSS:

- Enter the subscriber information
- Enter the environments
- Enter the node information
- Enter the cluster in IBFA

An IBSS cluster can consist of one or more instances. Cluster information can be entered on any member of the cluster. The cluster setup must also be entered in the corresponding IBFA.

Standalone Instances

It is possible to have multiple IBSS instances that are not part of a cluster. These standalone instances will each have their own config file and cannot be managed from a common instance because there is no shared config file. This means that every standalone IBSS instance would require subscriber, environment, and node information to be entered. This is not the recommended setup.

Ports Used by WebLogic, JBoss, and WebSphere

WebLogic, JBoss, and WebSphere utilize ports to access IBSS:

- WebLogic uses port 7001
- JBoss uses port 8080
- WebSphere uses port 9080

NOTE: *These are the most commonly used ports. The port number may be changed when domains, cells, nodes, servers or instances are created.*

If the designated port is unavailable or there is a conflict, your system administrator can change the port. For example, you can change the WebLogic default port (7001) during the Server Domain creation.

If you cannot find the IBSS instance you need at the port location specified, please check the port being used with your system administrator.

NOTE: *The IBSS parameter in the application URL must be capitalized.*

WebSphere

For a WebSphere environment, IBSS can be accessed by going to http://<yourserver>:9080/IBSS, where <yourserver> is the server the IBSS is installed on.

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

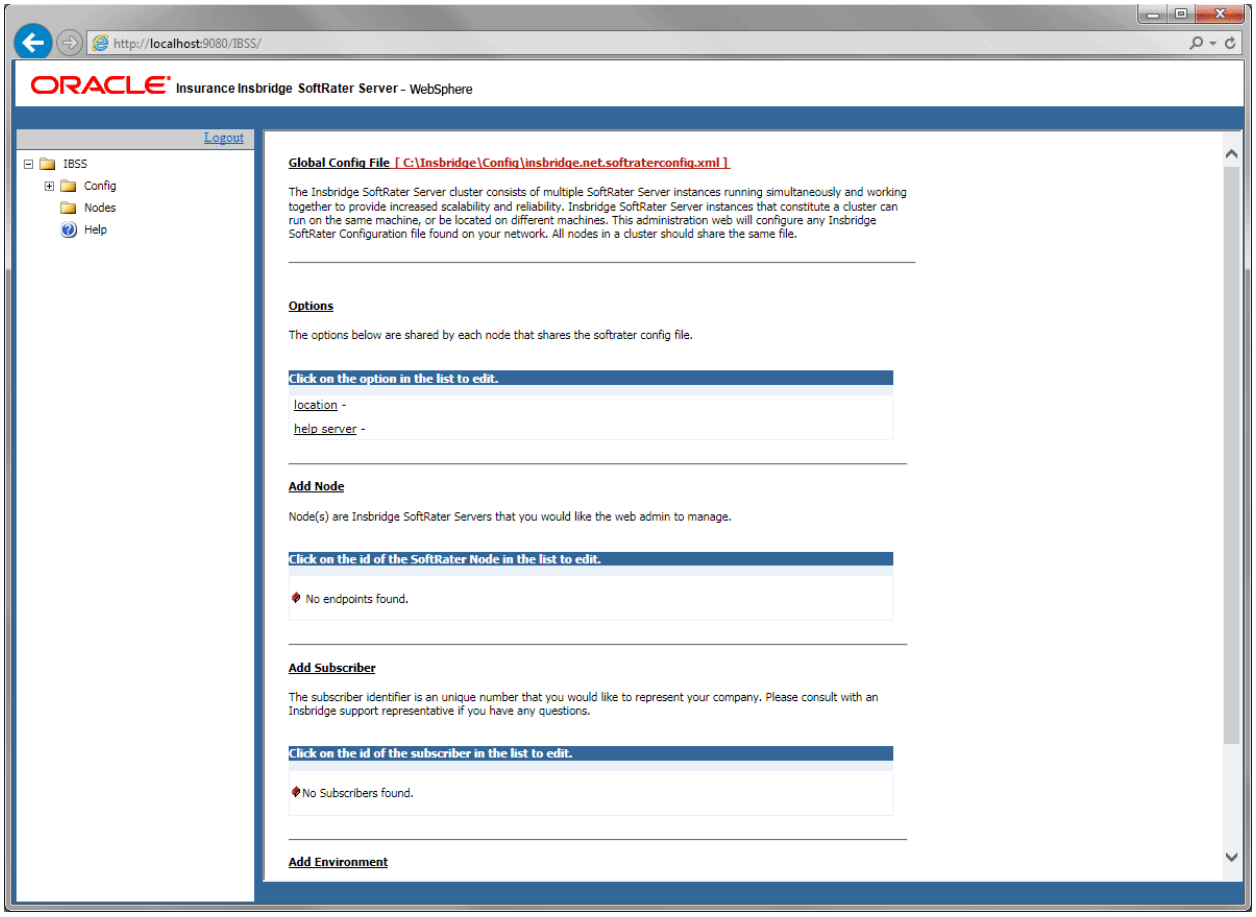


Figure 3 SoftRater Server for WebSphere

NOTE: *The top of the screen lists the platform you are on and the version of IBSS.*

JBoss

For a JBoss environment, IBSS can be accessed by going to http://<yourserver>:8080/IBSS, where <yourserver> is the server the IBSS is installed on.

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

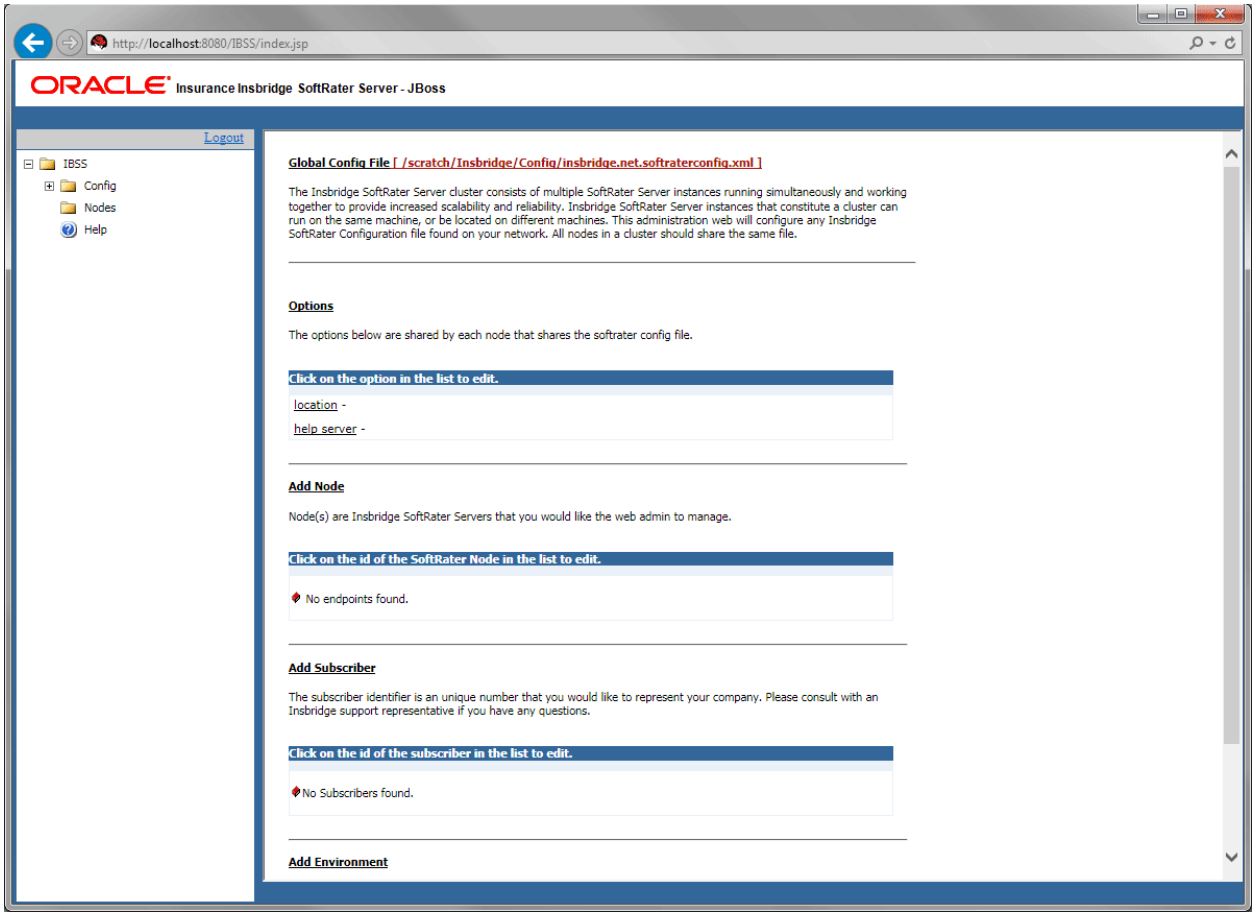


Figure 4 SoftRater Server for JBoss

NOTE: *The top of the screen lists the platform you are on and the version of IBSS.*

WebLogic

For a WebLogic environment, IBSS can be accessed by going to http://<yourserver>:7001/IBSS, where <yourserver> is the server the IBSS is installed on.

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

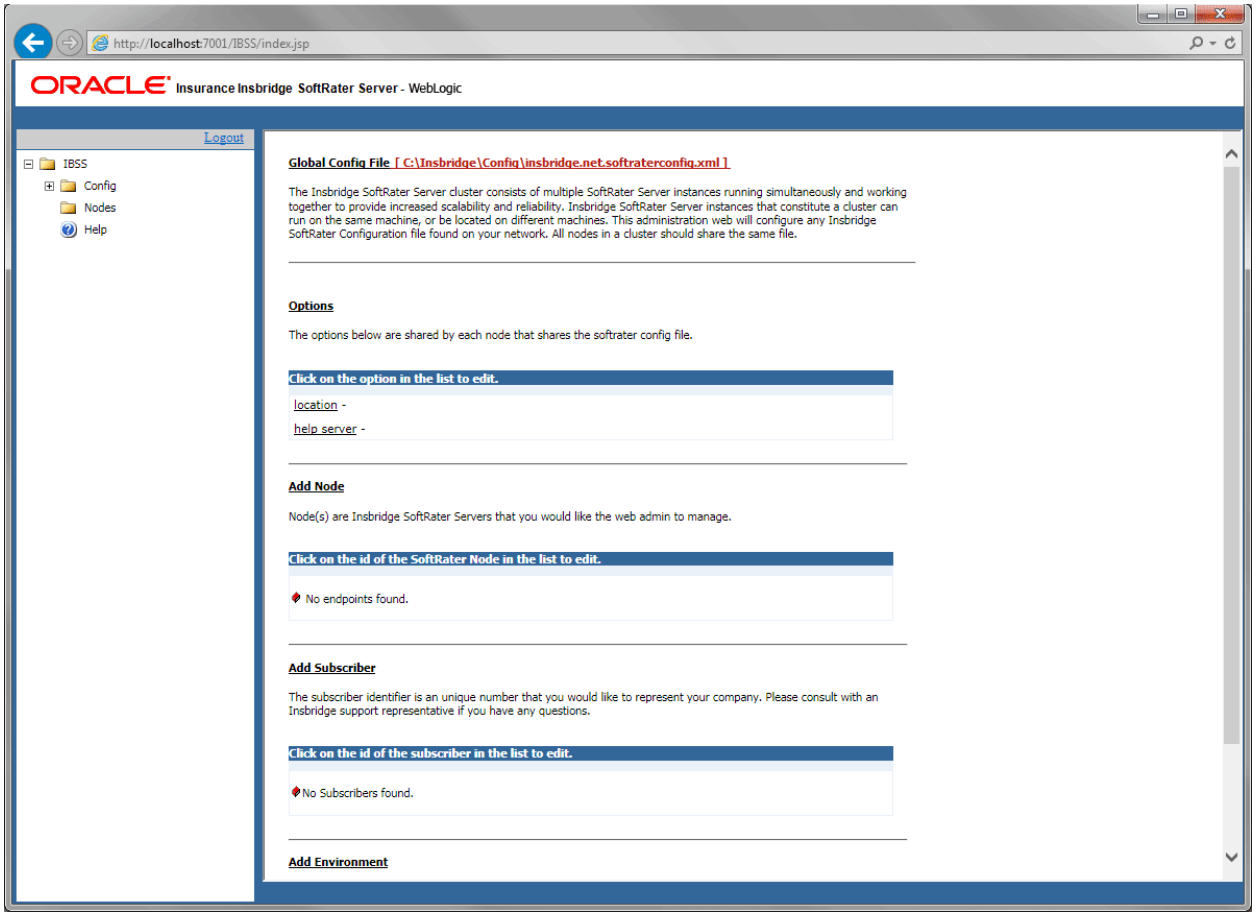


Figure 5 SoftRater Server for WebLogic

NOTE: *The top of the screen lists the platform you are on and the version of IBSS.*

Chapter 2

IBSS HOME PAGE

The IBSS Home page is the landing page whenever you open IBSS. Before you can use the SoftRater engine, subscriber, environments, and node information must be entered. Subscriber and environment information is generally done at installation time, but may be entered or updated at a later date if necessary. Node information can be done later as well.

The IBSS Home page is where you set up and manage:

- Subscribers
- Environments
- Nodes
- Options
- View the configuration file

This page operates the same way for WebLogic, JBoss, or WebSphere.

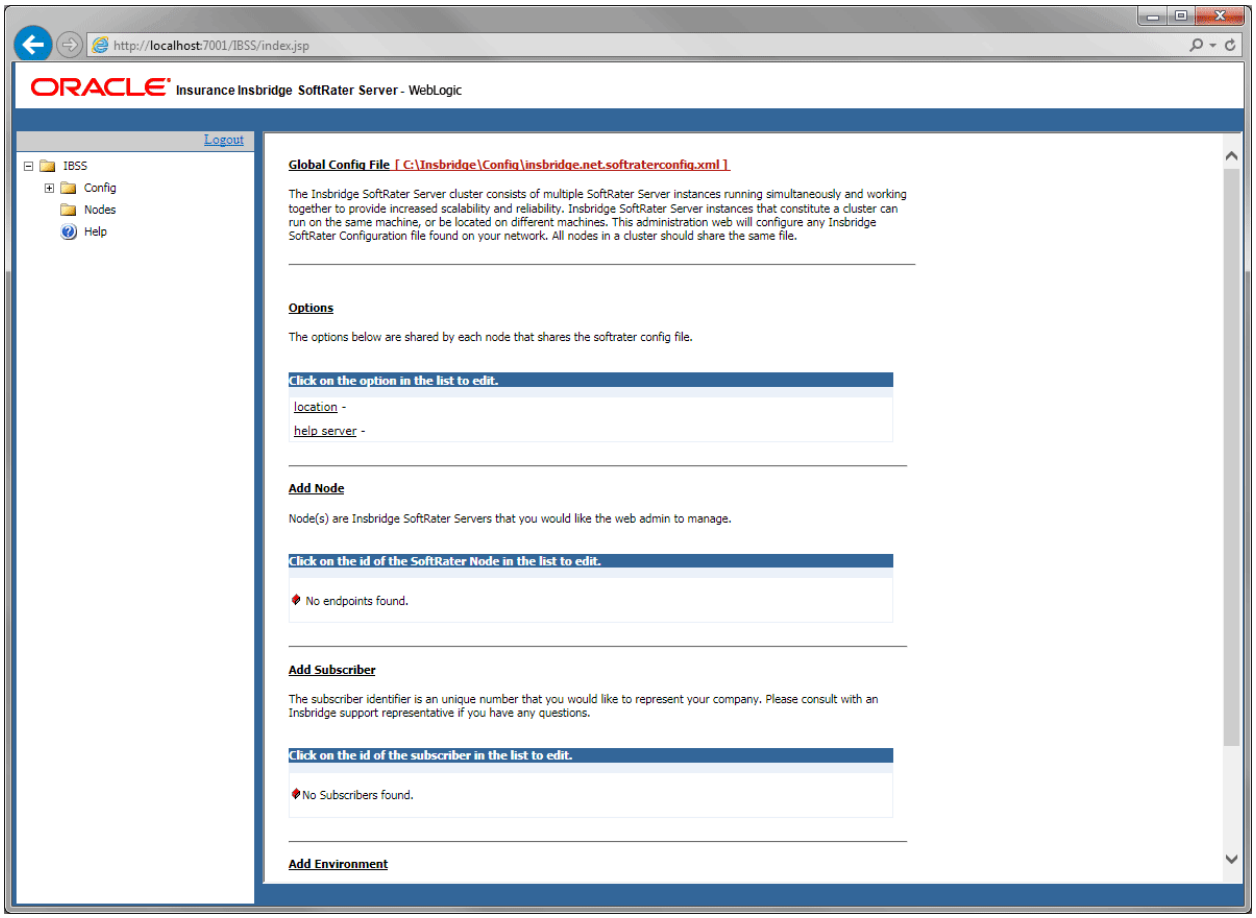


Figure 6 SoftRater Page

CONFIGURATION FILE

IBSS utilizes a configuration file (Insbridge.net.softraterconfig.xml) that is parked on the server where IBSS is deployed. When you make a change to subscribers, environments, etc. using IBSS, the configuration file gets updated. If the configuration file is shared across multiple IBSS instances, for example in a clustered environment, then every IBSS instance in the cluster has access to the update. The configuration file contains settings for:

- Configuration information
- Environments
- Database Connections
- SoftLibrary information

NOTE: *Clustered environments must use the same config file.*

Viewing the Configuration File

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

1. On the IBSS Home page, click the underlined configuration file path at the top; i.e. **C:\INSBRIDGE\Config\insbridge.net.softraterconfig.xml.**

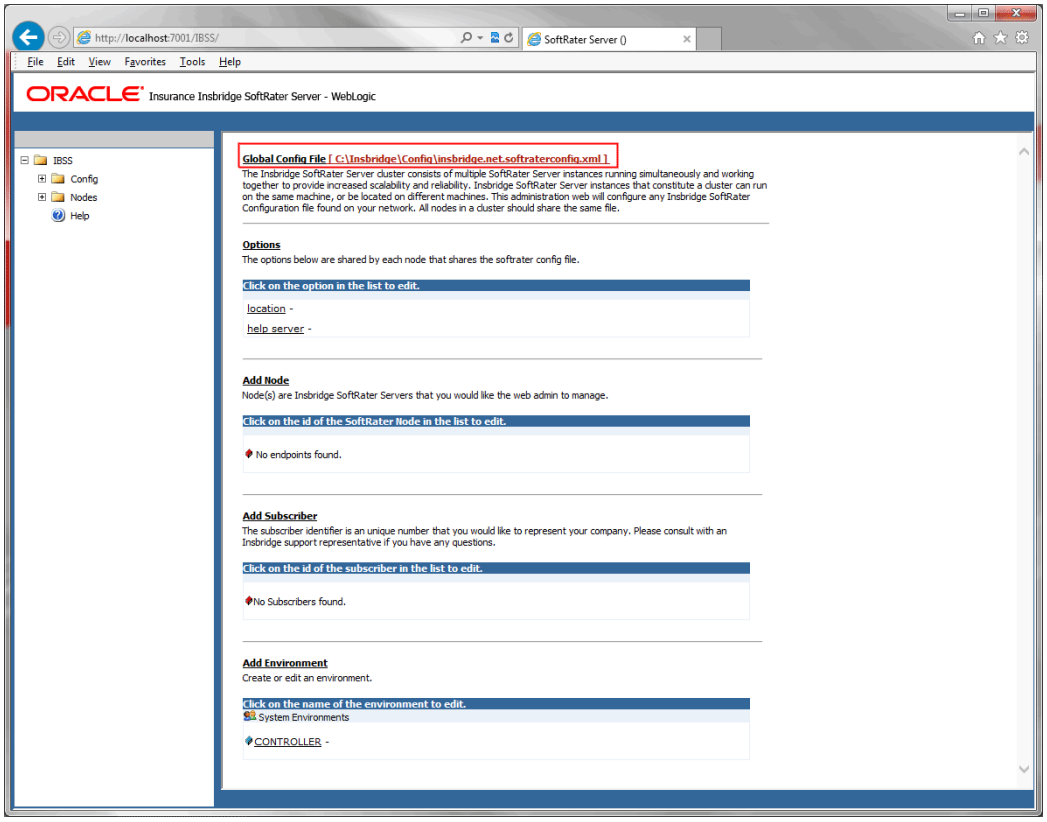


Figure 7 Insbridge Page Configuration File Path

2. The configuration file opens in a new window.

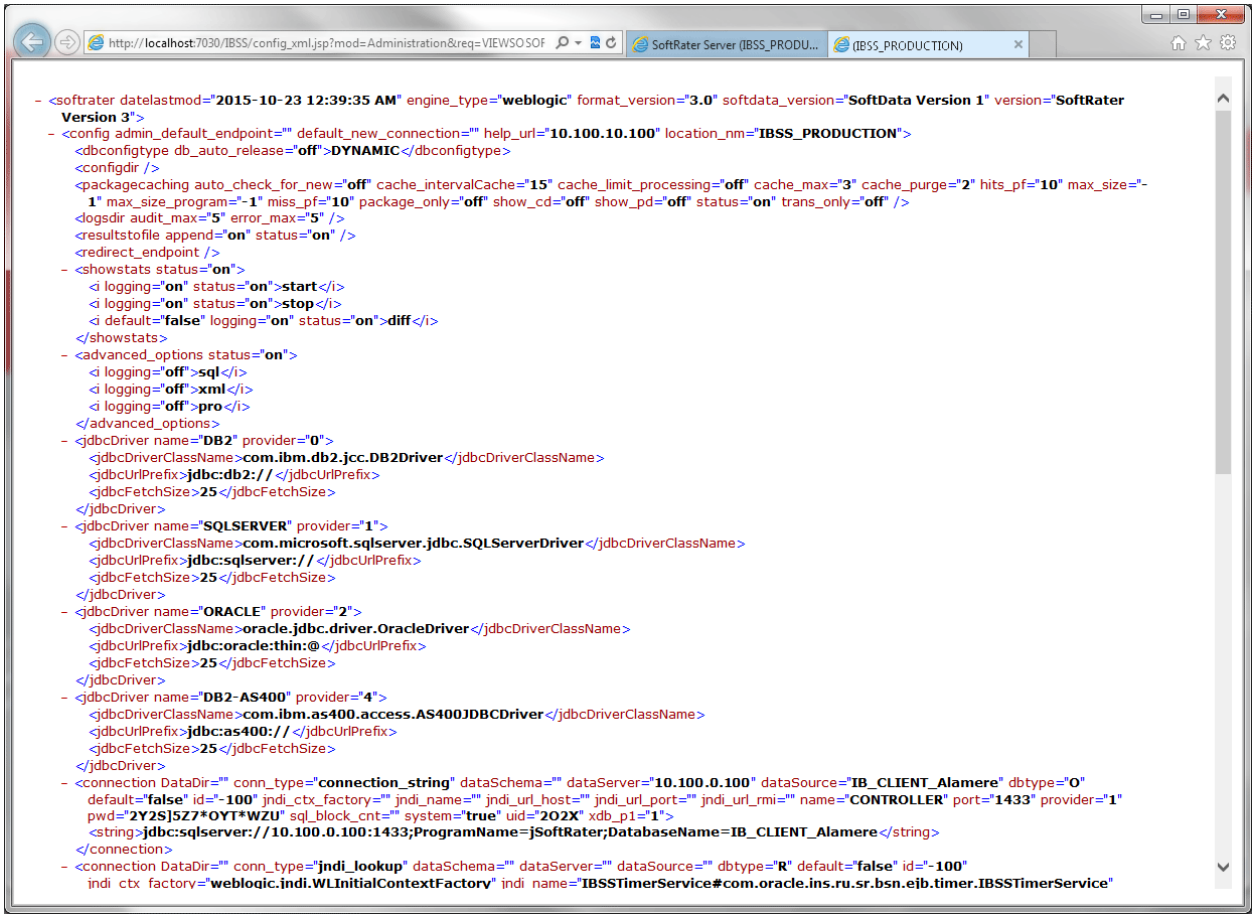


Figure 8 Configuration File New Window

NOTE: *The configuration path is set at installation. You may have a different configuration path than the one in the example.*

In a clustered environment, the same configuration path is displayed for every member of the cluster.

If you have multiple IBSS instances that do not share the same config file, the configuration path is the path for the current instance only.

OPTIONS

Options include the friendly name used to identify the server and the location of the help server. Options are shared by each node.

The location and help server fields are validated for entries not for content.

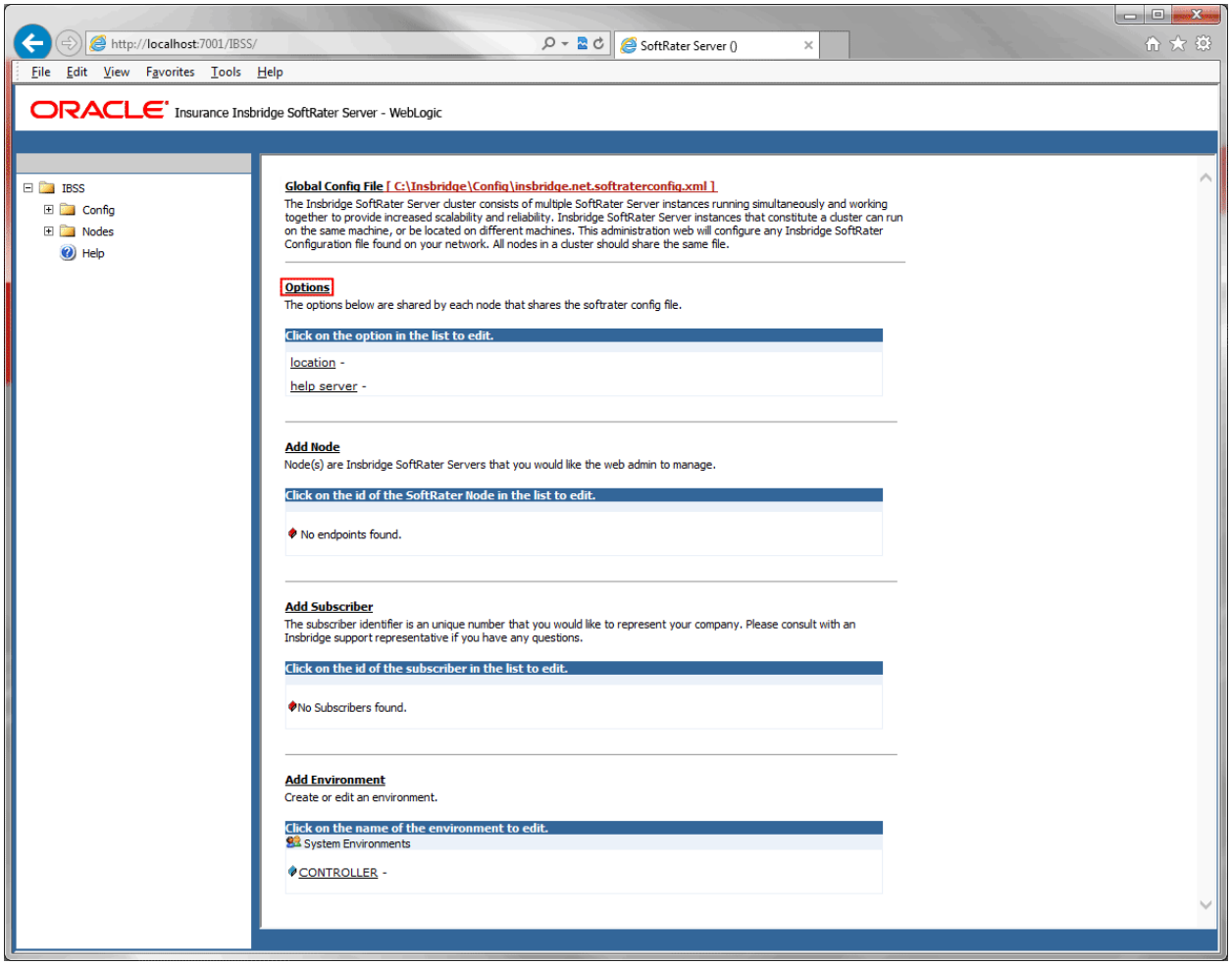


Figure 9 Options on the IBSS Home Page

Location Name

The location name is the name of the server where IBSS is located. The Location Name is the friendly name that is returned as part of the XML response content for each transaction to show the originating site for the result. The location name also is displayed on the top SoftRater Server tab on the browser.

Help Server

Help files are installed with IBFA. Enter the name or IP address of the server where IBFA was installed. This allows users to access the help files when they click on the help link. Leaving this field blank results in an error when users click the Help link on the IBSS home page.

You may need to contact your system administrator for the location of IBFA.

Setting Options

The options window can be opened by clicking the Options link on the IBSS home page or clicking the location or help server links.

1. Click the Options link on the IBSS home page. A separate window is displayed.
2. Enter in the Location Name. This can be a server name or IP address.
3. Enter in the Help Server. This can be a server name or IP address.
4. Click Save. The entries are displayed on the IBSS home page immediately.

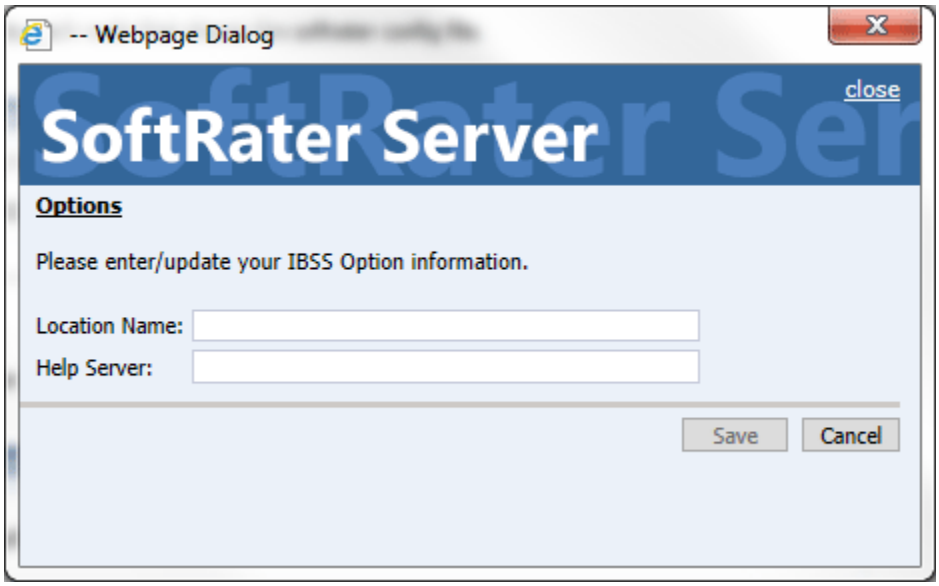


Figure 10 Entering Options

Editing Options

Options can be edited at any time. Once an entry has been made in the field, the field must have a value. You cannot remove the entry and leave the field blank.

Any updates or changes must be saved prior to closing the window. Cancel disregards any changes and closes the window.

Deleting Options

Options cannot be deleted.

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.

Any subscriber that is in IBFA must be created here also.

Adding a Subscriber

You can add a subscriber when IBSS is installed or later. The same subscriber information entered in IBFA should be entered in IBSS. The difference between an IBFA subscriber and an IBSS subscriber is the description. A description can be entered in IBFA but is not needed in IBSS.

The Subscriber IDs must match between IBFA and IBSS. The subscriber ID can be a 1-5 digit number and must unique. The ID is fixed after you save and cannot be edited. In IBSS, only the name can be edited. If you have entered the subscriber ID incorrectly, you must re-enter the subscriber.

If you are using nodes, you only have to enter the subscriber information once. Each node is populated with the same subscriber information.

1. From the IBSS home page, click the **Add Subscriber** link.

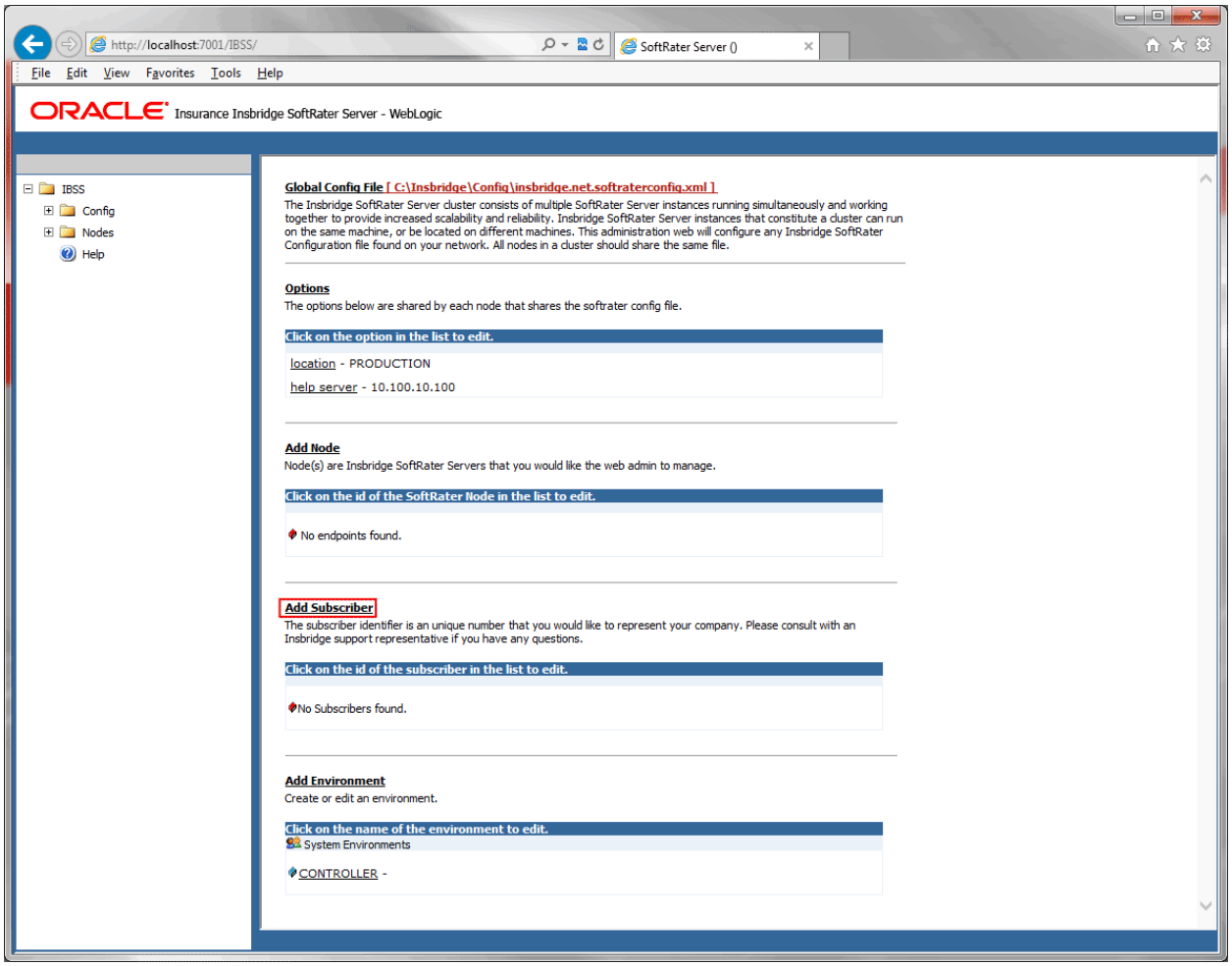


Figure 11 Adding Subscriber Links

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

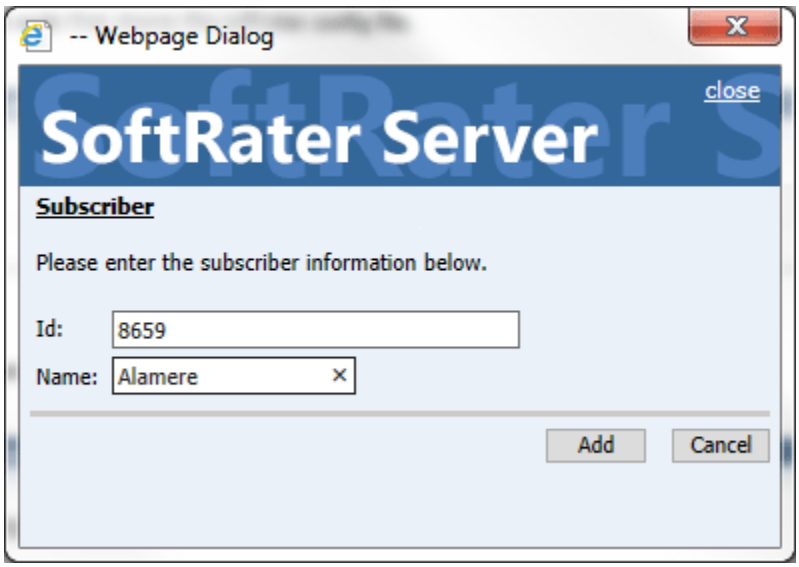


Figure 12 Adding a New Subscriber

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

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

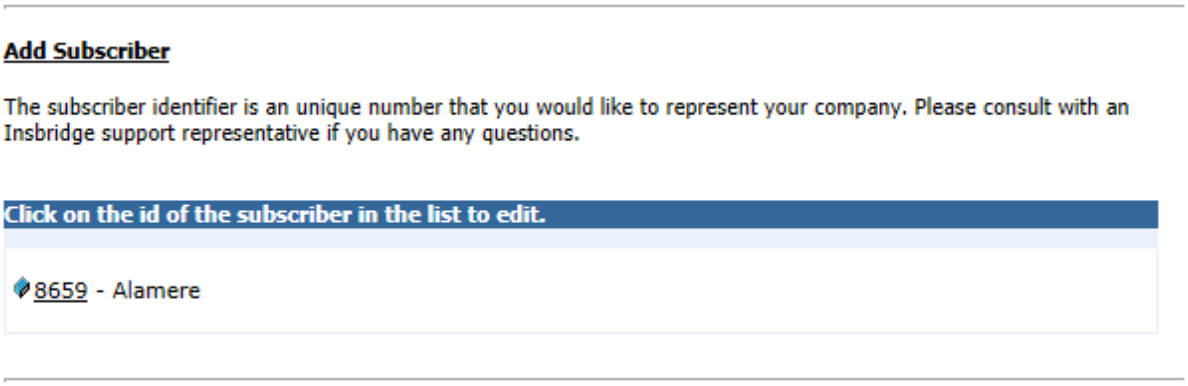


Figure 13 Subscriber List

Editing a Subscriber

The only edit allowed to a subscriber is the Name.

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.

Figure 14 Editing Subscriber

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 IBSS home page, click the hyperlinked Subscriber ID number.
2. This opens the **Edit Subscriber** window.

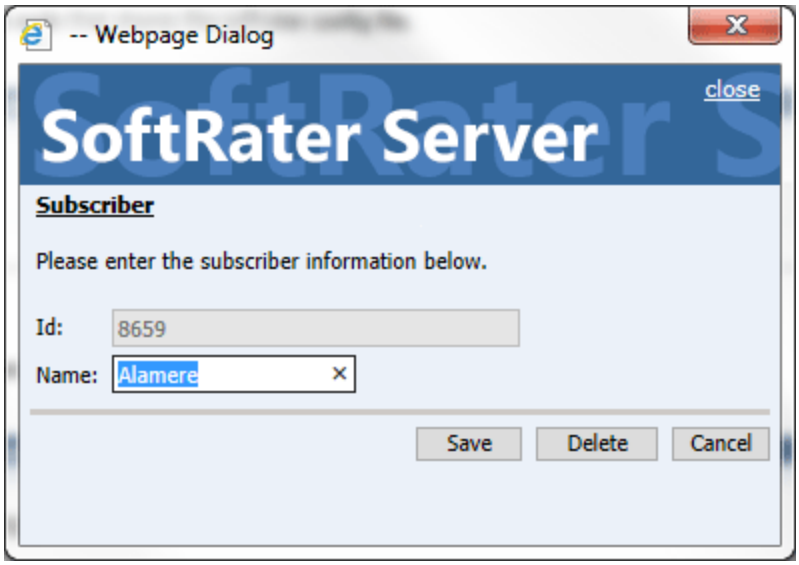


Figure 15 Deleting a Subscriber

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

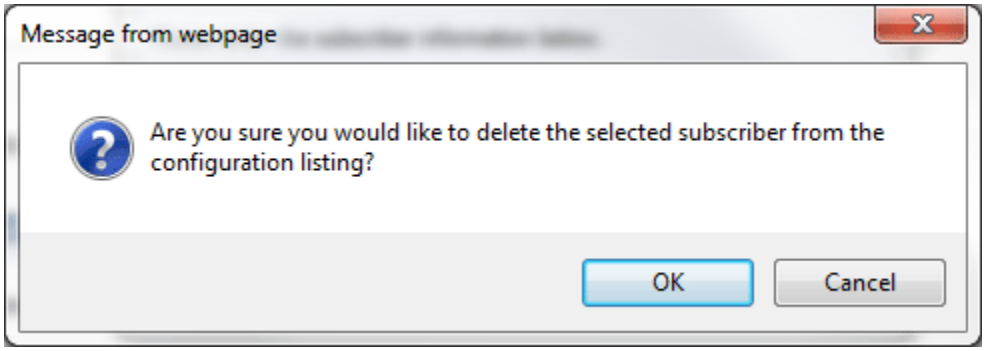


Figure 16 Confirm Deleted Subscriber

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

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

ENVIRONMENTS

The **Environment** section allows you to configure rating environments. An environment is a pointer to a location where SoftRater Packages (SRP's) are stored and loaded. There is no limit to the number of environments you may have. The Add Environment link is located on the IBSS home page.

Enter any environment that you want to share across the cluster. Environments entered here can be discovered by the IBFA instance when creating the IBSS cluster environment. IBSS cluster environments must be entered in IBFA. You only have one space to enter an environment, but as long as the cluster has all the databases entered, IBFA will be able to locate every environment entered.

Adding an Environment

Prior to creating up an environment in IBSS you need the database server, port, database name, user ID, and password information. If you are using an Oracle database, you also need to know if it is case sensitive or insensitive. You also may need Query block or schema name if you are entering a DB2 or Oracle database.

1. To create a new environment, click the Add Environment link on the IBSS home page.

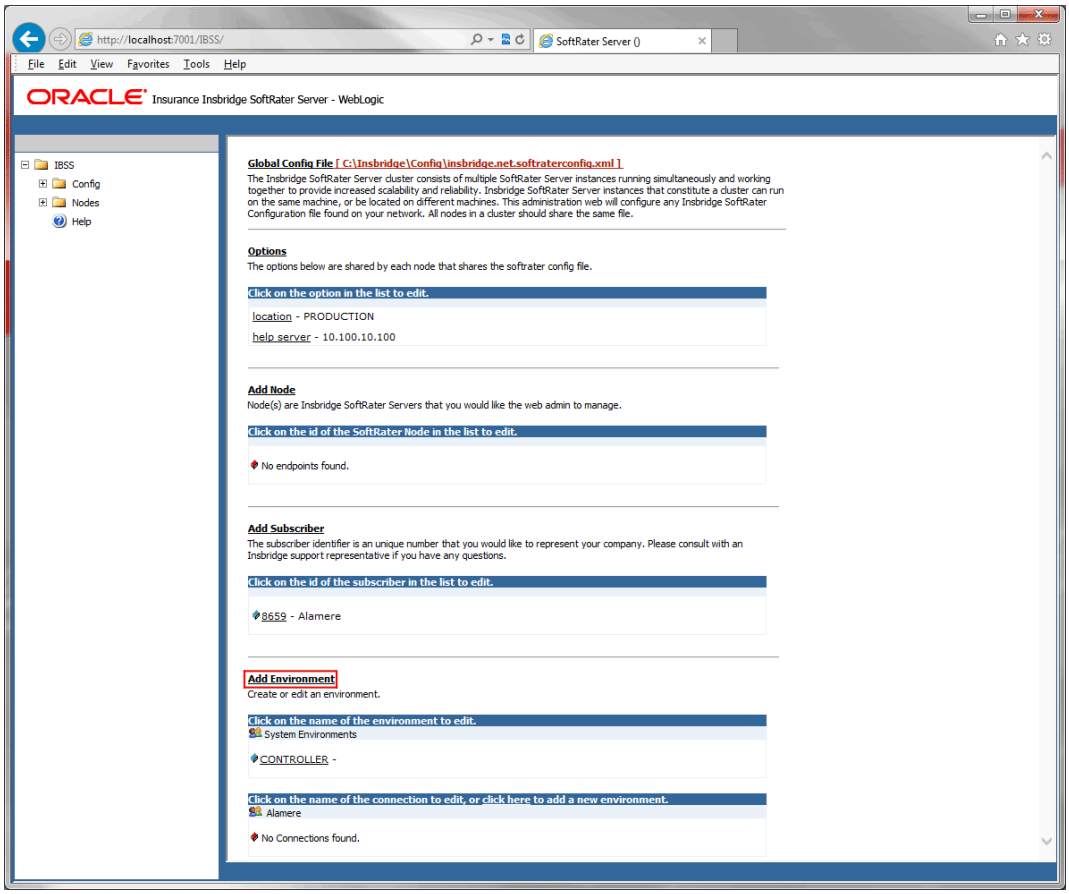


Figure 17 Add Environment

2. A separate screen is displayed. Different types of environments require different information:

For DSN Entries

Subscriber: Select the name of the subscriber from the menu.

Environment Name: A name for the environment. This is the friendly name.

Environment Type: Select the type of connection:

- **DSN** – The connection information is held by the Insbridge system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the Insbridge system.

Database Server: The name or IP address of the server where packages are loaded.

Database Port: Listening port for the target Database Management System.

Default port numbers:

- SQL Server – 1433
- Oracle – 1521
- DB2 – 50000

Query Block: 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.

For Oracle and SQL Server, Query Block is the size the block of data you want to submit. The default value is 64. Values can be set higher or lower as needed, 16, 32, 128, 512, to increase performance.

Batch Query Block: The size of the block of data to be submitted when batching. The default value is 64. Values can be set higher or lower as needed, 16, 32, 128, 512, to increase performance. 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 controls the maximum size of the batch query operations that can be submitted to the target DBMS in any one transaction. Batch Query Block is for Oracle databases only.

Batch Query Block is not needed for SQL Server or DB2 databases.

Database Name: The name of the database where packages are loaded.

Schema Name: The schema name for the database. Schema Name is not needed for SQL connections.

Database User Id: The username to access the database.

Database Password: The password for the username entered.

Provider Type: The type of the database

- **ORACLE**
- **ORACLE (BINARY_CI) (use for case insensitive)**
- **DB2**
- **DB2(AS400)**
- **MS SQL SERVER**
- **NONE N/A**

Database Type: The type of database being accessed:

- **SoftRater – The default. This option should be used for most installations.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

Data Dir: The location of the SoftRater Packages (SRP's) on the server.

Default Environment: Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon.

Connection to an Oracle RAC

When connecting to an Oracle RAC, you can use SID. For example:

Database Name: sid (Connection usingSID)

Or use the Service name. To connect to the service name, a slash has to be added in front of the database name. For example:

Database Name: /servicename (Connection using SERVICE)

When using SID, do not use the slash before the name.

3. When you are finished entering information, click **Save**.

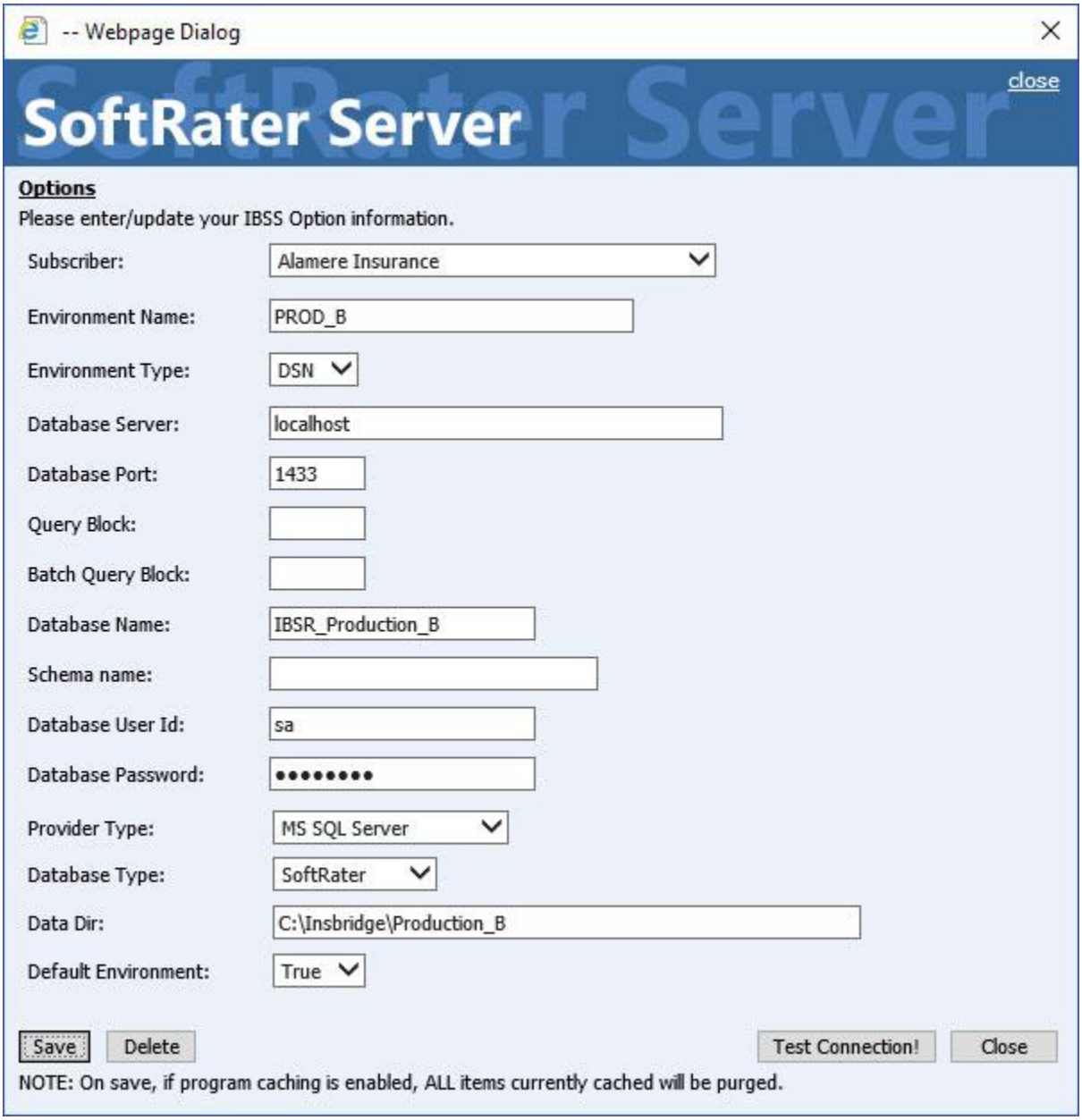


Figure 18 Environment Setup

4. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

For JNDI Entries

Subscriber: Select the name of the subscriber from the menu.

Environment Name: A name for the environment. This is the friendly name.

Environment Type: Select the type of connection:

- **DSN** – The connection information is held by the Insbridge system.
- **JNDI** – The connection is an EJB Lookup and information is not held by the Insbridge system.

Name: The name of the data source.

Context Factory: A URL context factory is a special object factory that creates contexts for resolving URL strings.

RMI: The Java Remote Method Invocation used.

URL Host: The name or IP of the host server.

URL Port: The port number used by the host server.

Provider Type: The type of the database

- **ORACLE**
- **ORACLE (BINARY_CI) use for case insensitive**
- **DB2**
- **DB2(AS400)**
- **MS SQL SERVER**
- **NONE N/A**

Database Type: The type of database being accessed:

- **SoftRater – The default.**
- **RateManager** – Supported for selected installations. Please contact Support.
- **OTHER** – Not used at this time.

Data Dir: The location of the SoftRater Packages (SRP's) on the server.

Default Environment: Select if this is to be used as the default environment. The default environment is used when no environment is specified. There can be only one default environment. The default environment is indicated with a red icon.

5. When you are finished entering information, click **Save**.

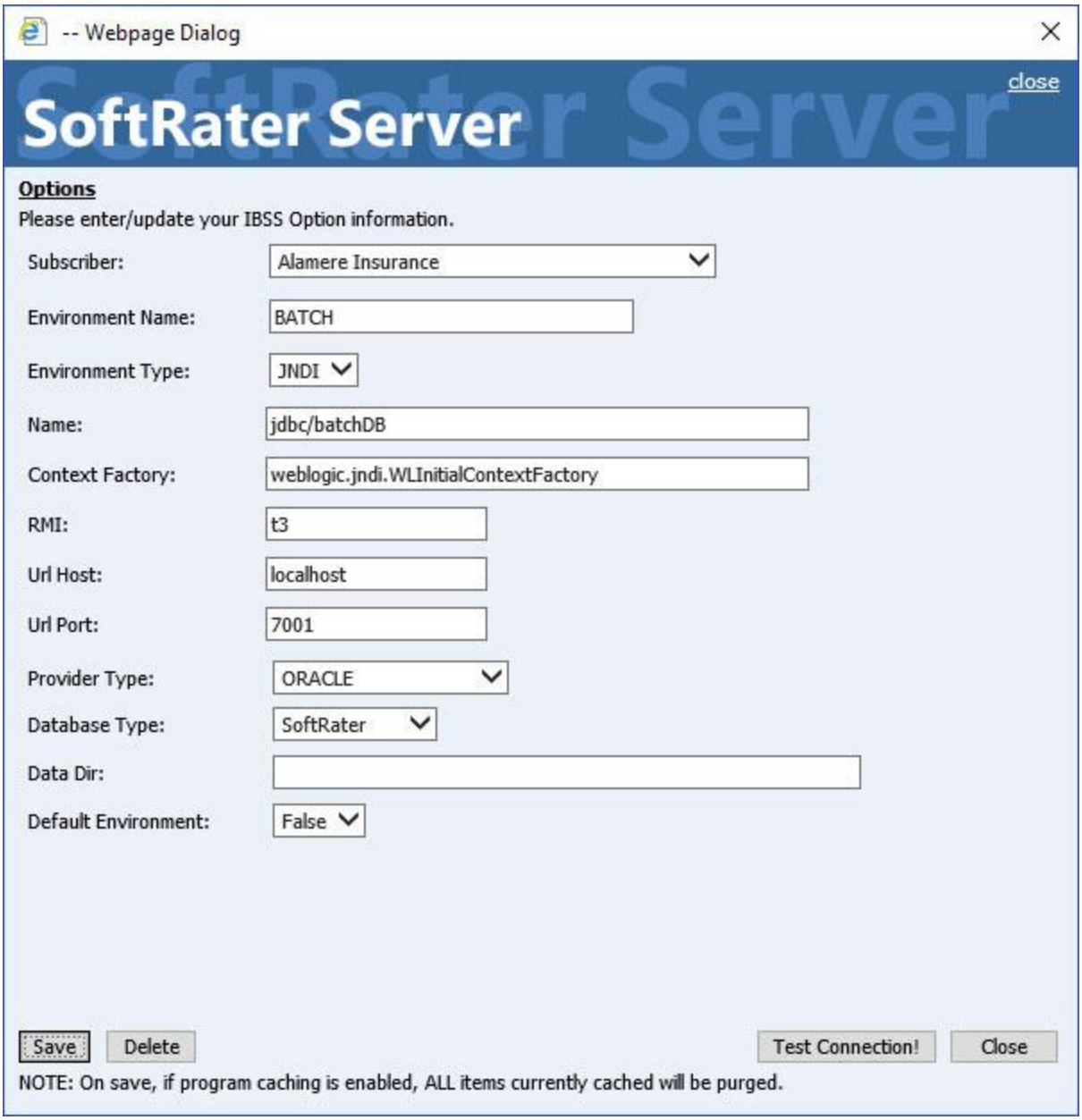


Figure 19 Creating a JNDI Environment

6. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

Controller Environment and Batch Rating

Batch rating requires a Controller environment entry. The controller manages the requests from the system. This is not the controller used by the IBFA. Only Oracle database connections can be used.

Controller

The Controller environment is a SoftRater database. This can be a standalone database, used strictly for managing batch ratings, or it can be a shared SoftRater database. If the Controller environment is shared, an entry must be made as a regular environment as well.

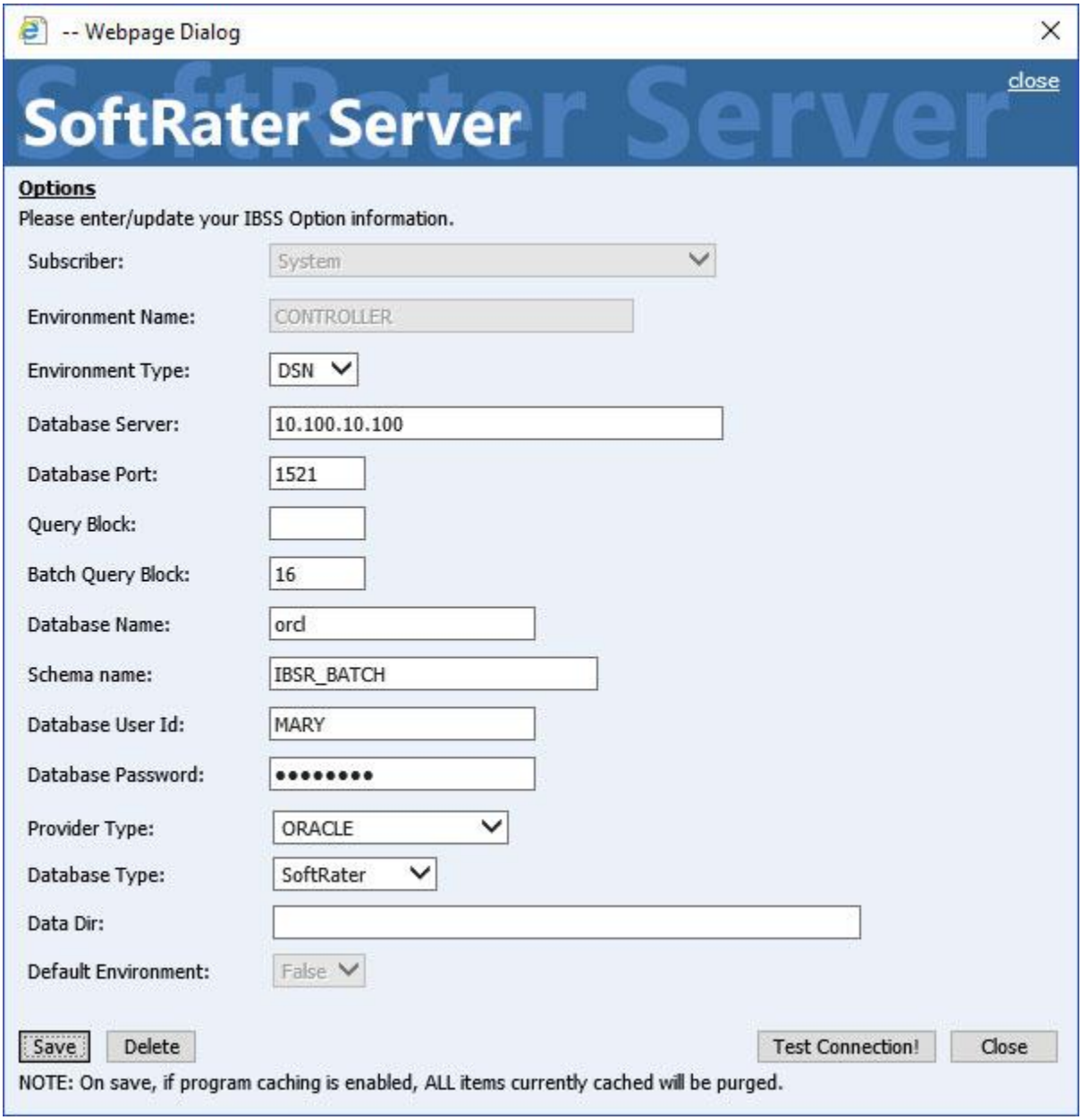


Figure 20 Adding a Controller Environment

No data directory is used for a Controller environment. The Controller environment cannot be default.

RateManager Environment

A RateManager environment can be added to IBSS if rating is to be done from RateManager to the IBSS environment and a debug report is needed. You can rate from RateManager against an IBSS environment but no debug report is produced. If you want to see a debug report, an RM environment must be set up in IBSS. This allows for the debug details to be stored locally and made available to RateManager.

The RateManager environment must be identical to the RM environment where rating is to be done. This applies to rating done from Test Case Editor and Testing.

Editing an Environment

Environments can be edited at any time. The subscriber cannot be edited. If you have selected the wrong subscriber you must delete the incorrect entry and re-enter with the correct subscriber.

1. To edit an environment, click the Environment link on the IBSS home page that you want to edit.

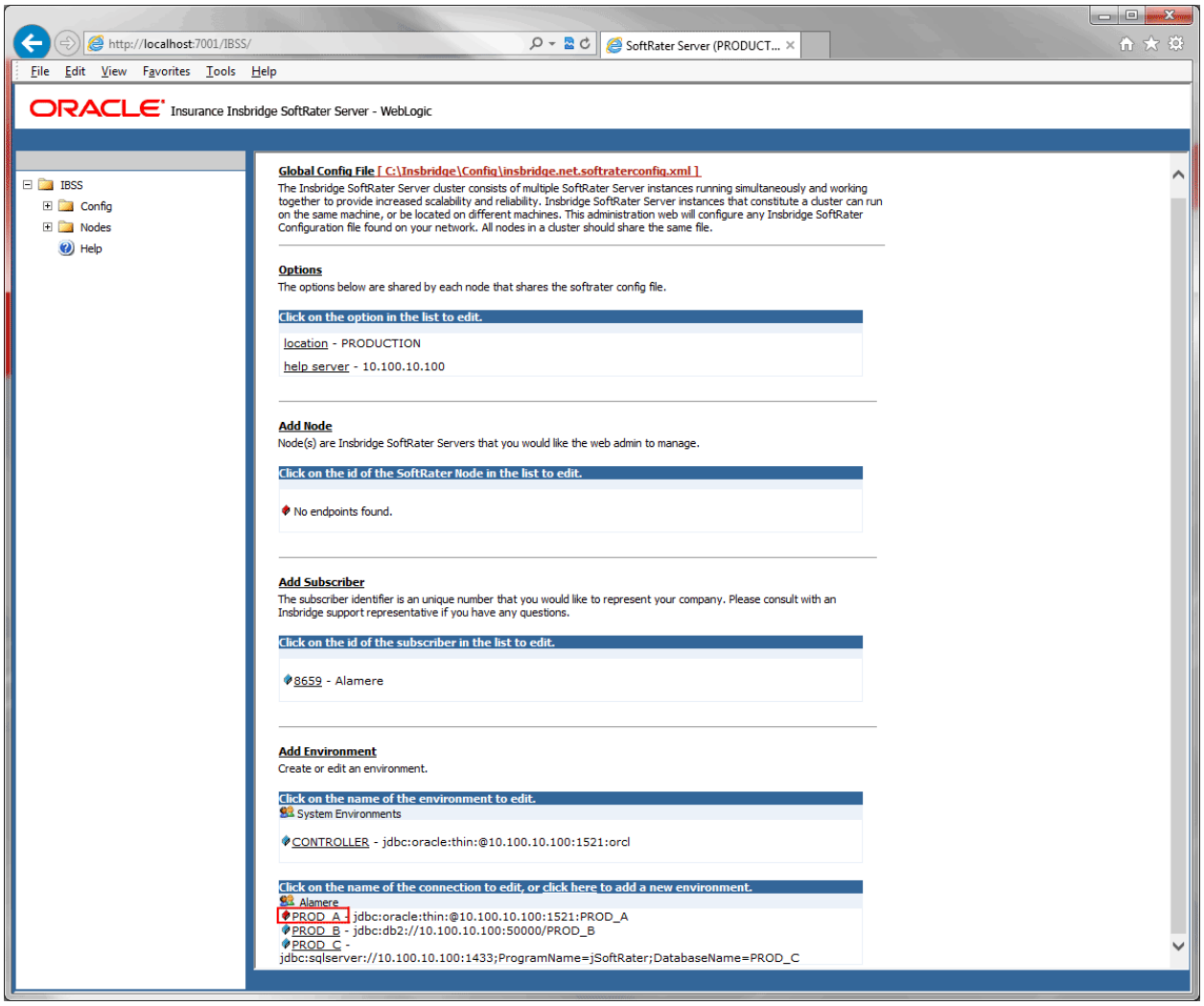


Figure 21 Edit Environment

2. The environment information window is presented. The subscriber information cannot be edited. All other fields are open for editing. The field highlighted in blue is the field you are currently in.

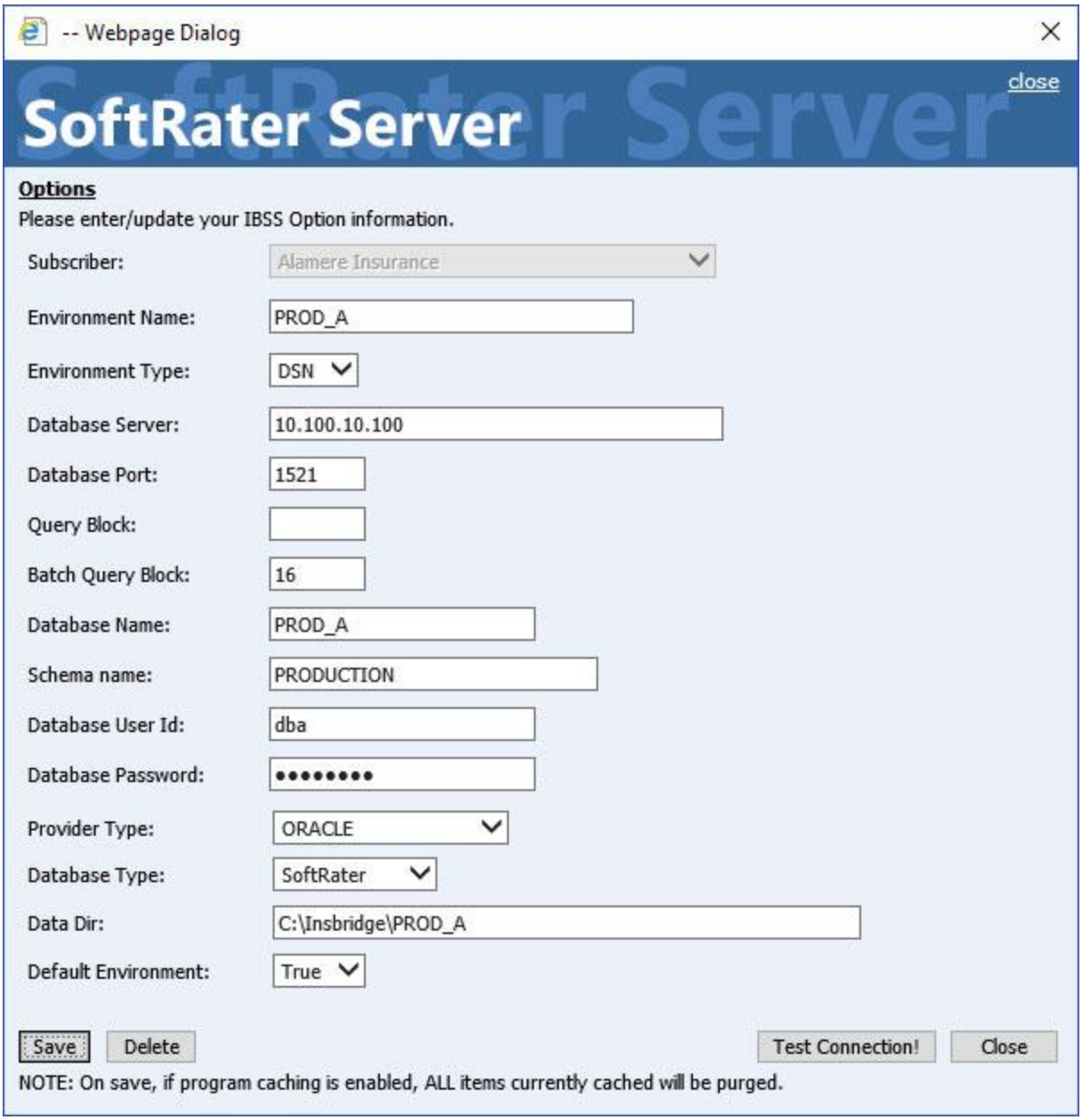


Figure 22 Editing an Environment

3. When you are finished editing information, click **Save**.

4. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

Testing an Environment

You should test your environment after saving to ensure the connection properties are valid. After saving the environment entry, click **Test Connection**. The results will be displayed in a message window.

Success Message

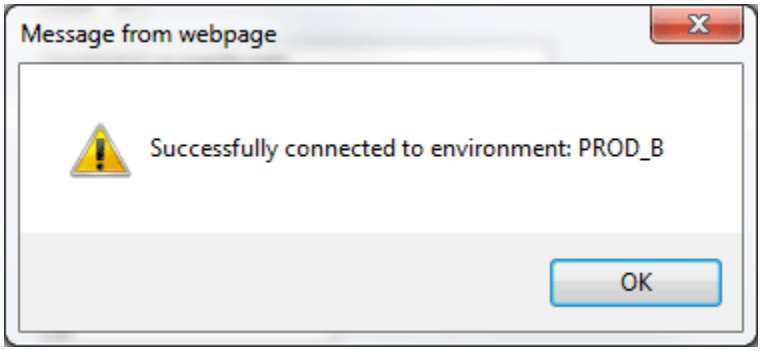


Figure 23 Successful Test Connection

Failed Messages

Failed messages from the test connection can show some common errors, such as typos, bad logins and failing to save.

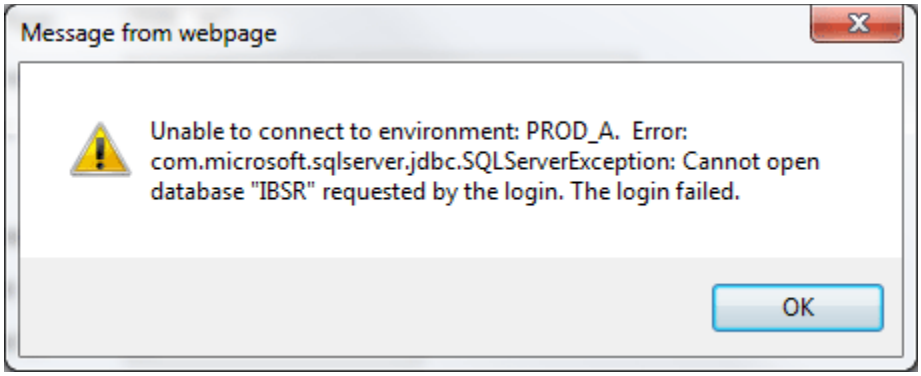


Figure 24 Failed Test Connection Bad Login Information

The “cannot open database…the login failed” error can sometimes results from bad user ID or password being entered.

If a database location or port number is incorrect, the information returned in the message may direct you to verify the connection properties, check the instance is running, check that the instance ports are open or that no fire wall is prohibiting the connection.

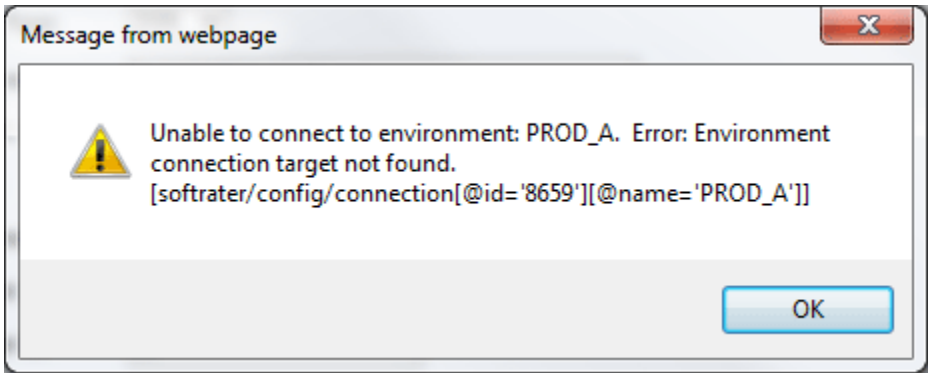


Figure 25 Failed Test Connection Not Saved

An environment connection target not found error sometimes results from the environment not being saved after updates. Save the environment and try again.

Deleting an Environment

An environment can be deleted at any time.

1. To delete an environment, click the Environment link on the IBSS home page that you want to permanently remove.
2. The environment information window is presented, click **Delete**.
3. You must confirm deleting the environment.

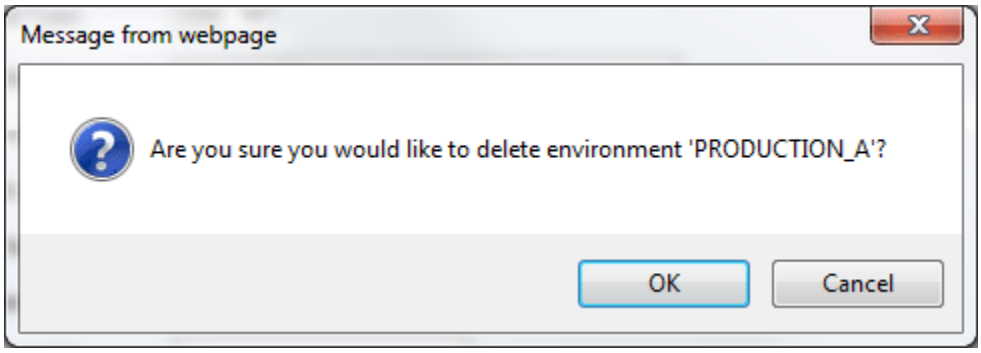


Figure 26 Deleting an Environment

4. Click **OK** to delete the environment or **Cancel** if you do not wish to delete the environment.
5. The environment will be deleted.
6. The deleted environment will still be available for rating against until the configuration XML file is reloaded. This is done by resetting the environments.

WARNING: *Make sure this is the action you want to take.* ***This action cannot be undone.***

NODE SETUP AND CONFIGURATION

A node is the endpoint of an IBSS instance. Every instance of IBSS must have a node created. Nodes allow you to manage the cache and log files and to reset the environment of the node. Nodes have the additional advantage of allowing for clustered environments to be managed from one location.

Nodes are created and managed on the IBSS home page.

NODE ORGANIZATION

In Figure 27 Cluster/Node Structure, the IBSS instance on the left is the instance that has been accessed using the IBSS URL (http://<*YOUR SERVER*>:<*port*>/IBSS. This could be any one of the member nodes. All nodes have the same view. This is because of the shared config.xml file.

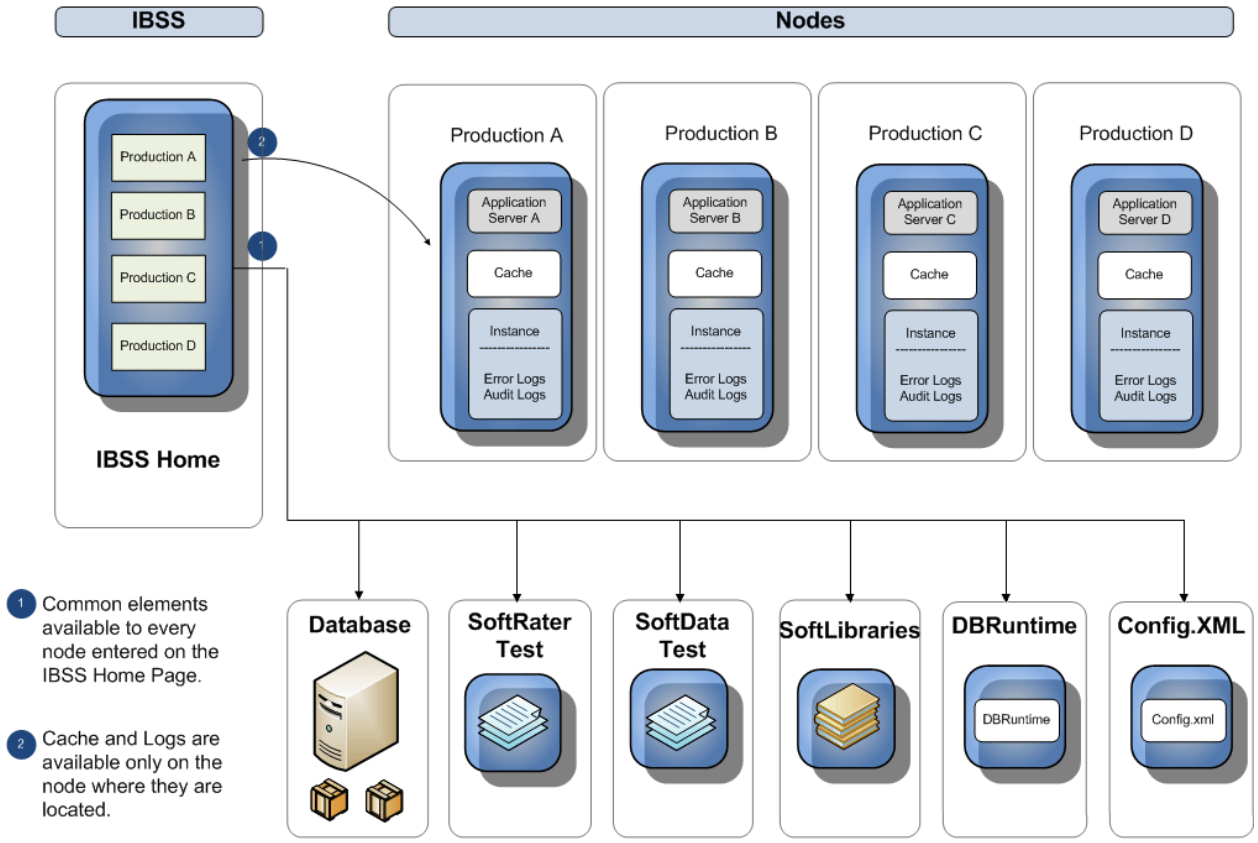


Figure 27 Cluster/Node Structure

The IBSS instance that has been accessed is also presented as a node. There is no distinction between the node you have accessed and other member nodes. You will see the same information presented on the IBSS home page and have access to the same databases, SoftRater Test, SoftData Test, DBRuntime options, and SoftLibraries.

There are features that can be accessed on a selected node only:

- Reset a single node environment
- Start and stop services for a single node
- View messages for a single node
- Cache
- Logs

These features can only be accessed under the node where you want to view or perform an action.

ADDING A NODE

Every IBSS instance requires a node, which should be entered at installation. Additional nodes can be entered then or at a later time. Nodes are listed under the Add Node section on the IBSS home page. Nodes are also listed on the left side of the window in alphabetical order. To view nodes, expand the Nodes folder.

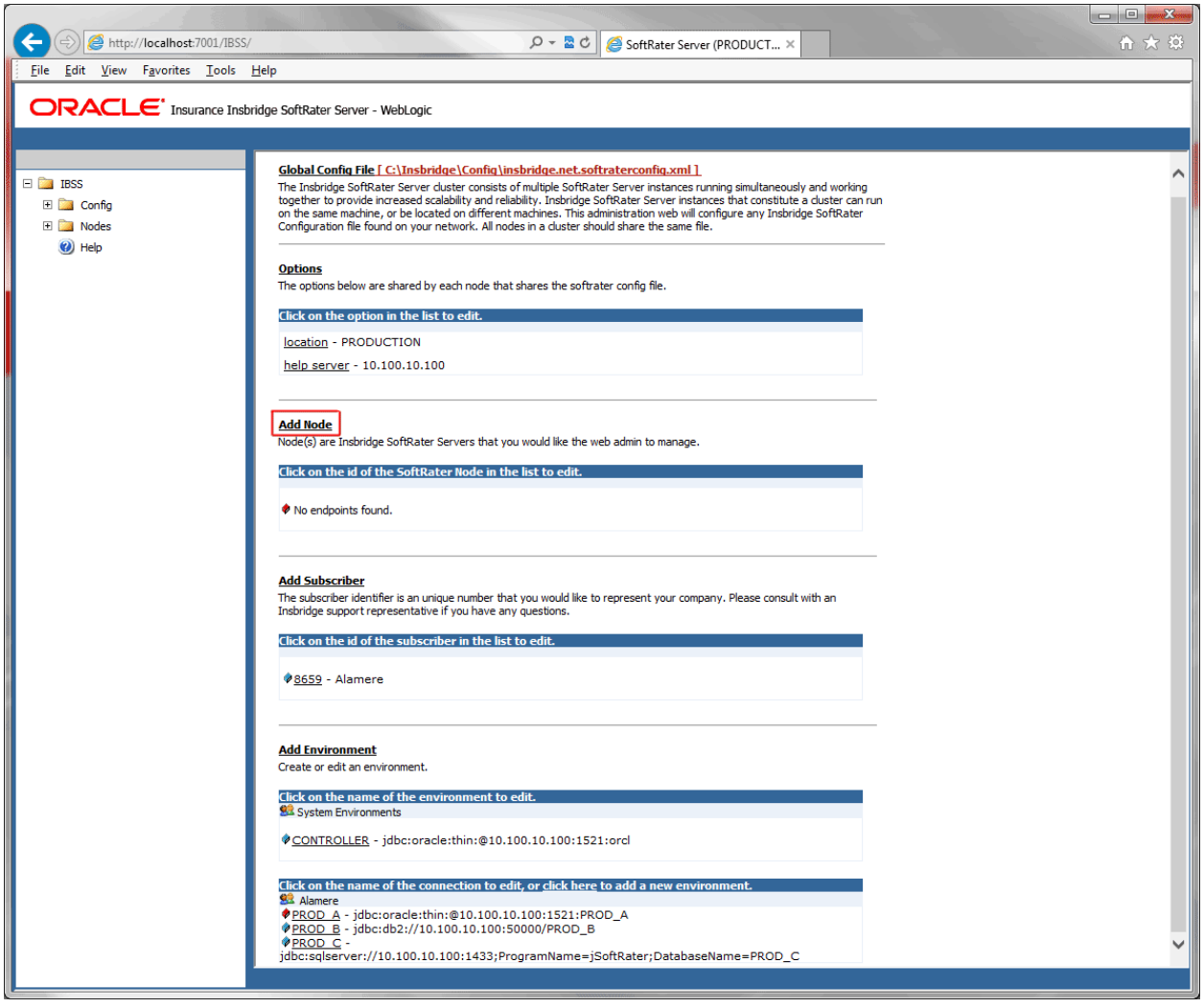


Figure 28 Adding a Node

Using HTTPS

IBSS supports HTTPS (ssl). Functionality is the same as an HTTP connection. HTTPS has to be configured at the server level and no additional configuration is needed in IBSS.

Enable IBSS over HTTPS to secure the application. It is advised to completely disable HTTP when HTTPS(ssl) is enabled.

Check Secure when creating a node instance. This indicates that the connection at the server level is secured. A secure node can be added only in a HTTPS enabled IBSS.

The default port number for HTTPS for different servers is:

- WebLogic: 7002
- WebSphere: 9443
- JBoss: 8443

However, the HTTPS ports can be configured at the server level and may be different than listed.

To create a node, server information is needed:

- **Server OS**
- **Server Name or IP Address**
- **Port Used**

1. From the IBSS home page, click the **Add Node** link.
2. This opens the **SoftRater Server Node Instance** window.

Figure 29 Adding a Node

3. Select the server operating system from the drop down. There are three choices, Linux, Mainframe and Windows.

4. Enter the server host name or IP address and port. The default ports:
   - **WebLogic:** Port 7001
   - **WebSphere:** Port 9080
   - **JBoss:** Port 8080

The format for this is: [SERVER NAME]:[PORT NUMBER]

5. Enter a friendly name. This is the name displayed for the node.

6. Check Secure if HTTPS is being used. A secure node can be added only in a HTTPS enabled IBSS.

7. It is recommended that the Ping Server option be used to test the connection. This is an optional step but can be helpful. If a connection cannot be made, the node cannot be saved.

8. Click **Add** to add the node. The connection is validated and if a node cannot be added, an error message is displayed. Please correct the error and try again. Only nodes that can connect will be added.

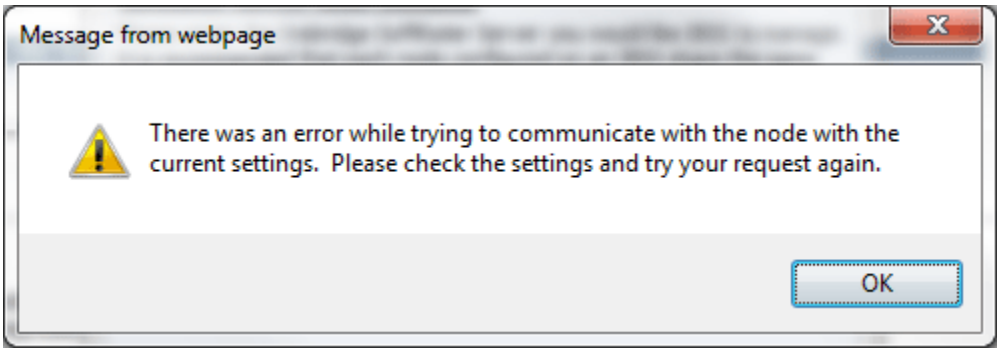


Figure 30 Node Error

NOTE: *It is recommended that server names or IP addresses be used over localhost.*

EDITING A NODE

Nodes can be edited at any time. The server name or IP address cannot be edited. If you have entered an incorrect server name or IP address, you must delete the incorrect entry and re-enter with the correct information.

1. To edit a node, click the Node link on the IBSS home page that you want to edit.

Figure 31 Editing a Node

2. The node information window is presented. The server name or IP address cannot be edited. All other fields are open for editing. The field highlighted in blue is the field you are currently in.

3. When you are finished editing information, click **Save**.

4. Before you can use the new or edited environment for rating, you need to reload the configuration XML file. This is done by resetting the environments. On the left hand side of the IBSS home page, expand Nodes and select the Reset Environments option. You will be placed on the Reset Environment Configuration page. Click **Execute**. The screen refreshes and each node will be reset. Click IBSS to return to the home page.

Testing a Node

You can test for connectivity using the Ping Server option of the Node instance window. The Ping Server lets you know immediately if a connection can be made to the node.

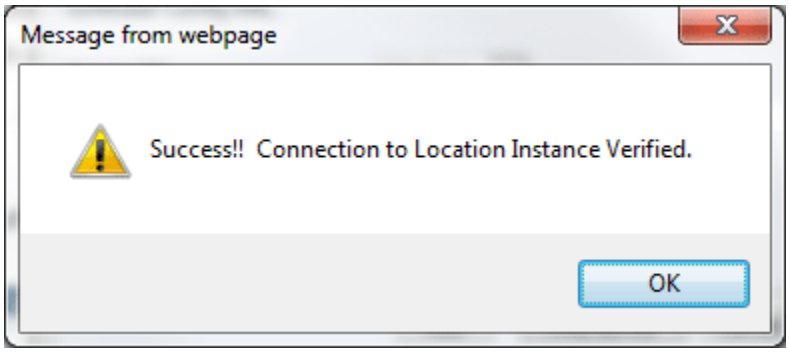


Figure 32 Successful Node Connection

If connectivity cannot be established, a fail message is returned.

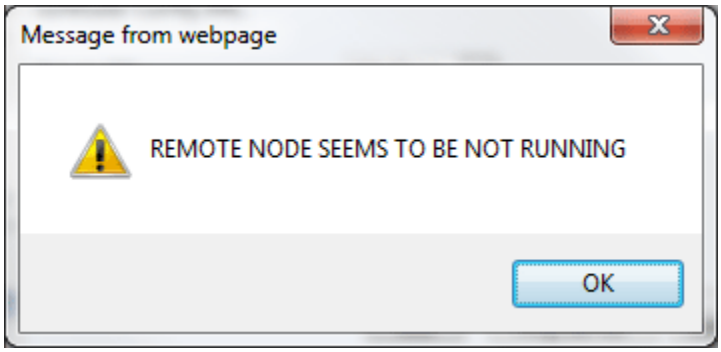


Figure 33 Down Node Message

DELETING A NODE

A node can be deleted at any time.

1. To delete a node, click the node link on the IBSS home page that you want to delete.
2. The environment information window is presented, click **Delete**.
3. You will be asked to confirm deleting the node.

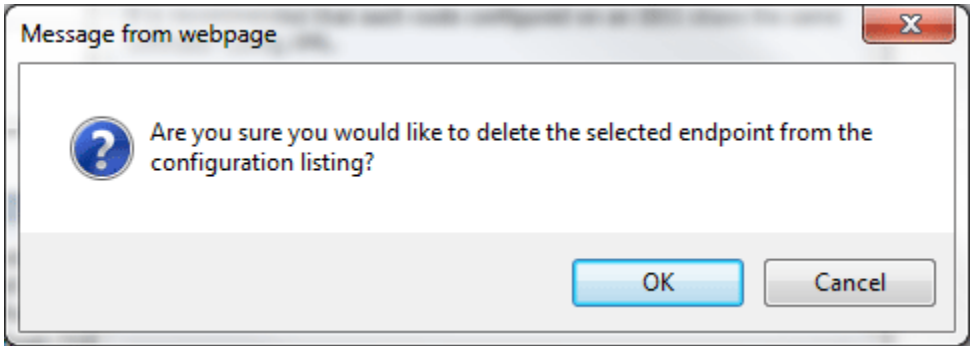


Figure 34 Deleting a Node

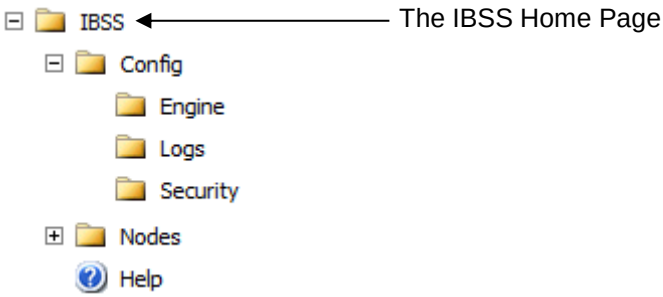
4. Click **OK** to delete the node or **Cancel** if you do not wish to delete the node.
5. The node will be deleted.
6. The deleted node may still be listed until the configuration XML file is reloaded. This is done by resetting the environments.

CONFIG

The Config section holds the settings that apply to the entire IBSS system. Every setting has a default that is used. When the setting is updated, the update applies to the entire system.

After making any change to any option in the Config area, you must reset the environments for every node. The option to reset environments for every node is on the Nodes folder. Resetting environments reloads the config.XML file. Environments need to be reset to activate changes made in the Config area. Changes do not take effect until the SoftRater configuration XML file is reloaded. The reset happens immediately.

The Config section of IBSS has three pages:



The Config section of IBSS has three folders:

- **Engine**
- **Logs**
- **Security**

ENGINE

The Engine page is where you can select the information to be automatically logged and the statistical information to be returned in result XML files. The settings here apply to all nodes.

To navigate to the Engine page, select IBSS->Config->Engine.

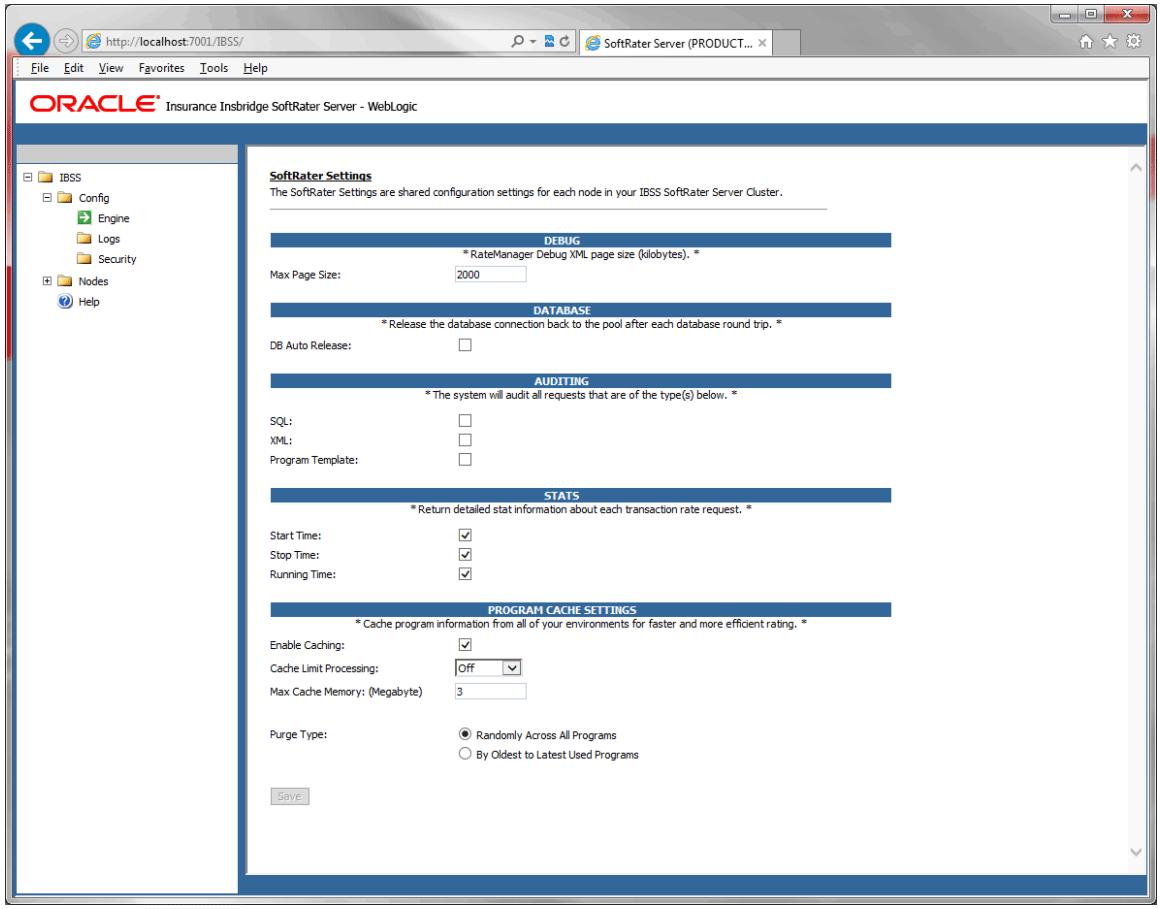


Figure 35 Engine Page

Debug

The RateManager Testing module has the option to return a debug report with a testing result file. A debug report is a complete XML that is translated to the screen. Debug reports can be large and require a lot of scrolling. When rating through a SoftRater for Java instance, the SoftRater engine can monitor how large the final XML is and based on the size, the system will split the results into multiple pages. This allows you to receive a report that can be paged through rather than scrolled through.

The DEBUG setting is where the max page size is set. When producing an XML file larger than the threshold, the page is cut off and a new page is started. The setting is in kilobytes. The setting default is 2MB. Any value can be used but the smaller the setting, the more pages that are returned. If reports of 4mb are typically returned, paging is recommended.

- Requirements: The same environment (Rm_java) that is in IBFA must be setup in IBSS.
- This setting is only for debug reports on the Testing module.
- This option is only when rating against a Java engine.

DB Auto Release

A check in this box enables this feature. If this feature is enabled, the database connections are released as soon as the transaction or request is complete. In the case of a Program to Program (P2P) call, the connection is released as soon as the calling program is finished. If enabled, every time you call the database, a connection will need to be re-opened. This may slow down performance because connections will be opened and closed after each call. You may require this option if you have a limited number of database connections, licensing restrictions, or you are unable to keep connections open.

No check in this box disables this feature. If this feature is disabled, the database connection remains open. You may want keep this feature disabled if you have heavy usage, a large pool of connections, or you are able to keep connections open. Disabling the feature may result in faster performance. However, connections will scale up and down as demand is placed on the DB. If you have a limited number of connections and heavy demand, disabling DB auto release may not give you the performance increase you need. Pool settings can be set by the DB administrator to allow for a larger connection pool. If disabled at the SoftRater level, on most DB servers, there is a setting that can be used.

DB Auto Release is disabled by default.

Auditing

Allows you to select what information should be logged for each transaction. These options should typically be left unchecked, unless directed to check them by a member of the Oracle Insurance Support team. Leaving auditing on may result in exceptionally large log files.

SQL: The SQL script that was executed. If this option is not selected, this information will still be logged if an error occurs.

XML: The XML that was used. If this option is not selected, this information will still be logged if an error occurs.

Program Template: Provides an XML view of the entire program that was executed. This information is used to help Oracle Insurance determine why a program is not rating correctly.

NOTE: *SoftLibrary logging is done on the SoftLibraries page.*

Stats

Allows you to select if and what statistical information is included in the return XML. Any combination of options may be selected. The statistical information is returned in the <stats>

node.

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

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

Running: 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* ***Running Time*** *is shown in milliseconds (10^{-2} seconds).*

Cache Setting

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 when environments are reset.

The Cache Settings allows you to enable caching. A check indicates the cache is enabled. If cache is not enabled, then the rate package is retrieved from the database every time. This may increase rating times.

The Program Cache Settings allows you to configure the cache used by the server where SoftRater is located.

Enable Caching

If Enable Caching is checked, then the caching values entered are utilized. If unchecked, caching is disabled and all data (hits and misses) will be purged from the cache.

Cache Limit Processing

Cache Limit Processing can be turned on or off as needed. When set to on, you can set the limit of the Max Cache Memory.

Max Cache Memory

Max Cache Memory places a limit on the amount of cache to be held in memory. If the limit is met prior to any purge interval value, the cache is purged starting with the oldest. The minimum value is 256 mg the maximum value is 32768 mg.

This setting determines the maximum amount of Application Server Memory and VM Instance memory that can be used for engine cache storage. This limit is per JVM. When the Max Limit is reached, an alert is written to a log.

- The values entered are in megabytes (mg).
- Only whole, positive values can be entered.
- The lowest valid number allowed is 256 mg
- The highest valid number allowed is 32768 mg or 32 gigabytes.

If the field is blank, no limit is used. This is the default.

Purge Type

- **Randomly Across All Programs:** Purges evenly across all programs. This is the default setting. This type of purge removes all cache misses first and then randomly selects and purges cache hits. These steps are repeated until the amount of memory removed is below the maximum allowed.

- **By Oldest to Latest Used Programs:** Purges from the oldest used program to the latest used program. This type of purge creates a sorted list of all cached program versions by last date accessed and removes the oldest first. Prior to any programs being purged, cache misses are purged. Cache hits are removed randomly. These steps are repeated until the amount of memory removed is below the maximum allowed.

LOGS

The Logs page is where you can set the log size for error and audit logs. Every node has individual error and audit logs. The size set on the Logs page applies to each node, not to the collective amount between all nodes. For example, if you set a size of 4, then every node will have a log size of 4. The sizes are in MB. If a log file reaches the max size, then log files roll off with the oldest being purged first.

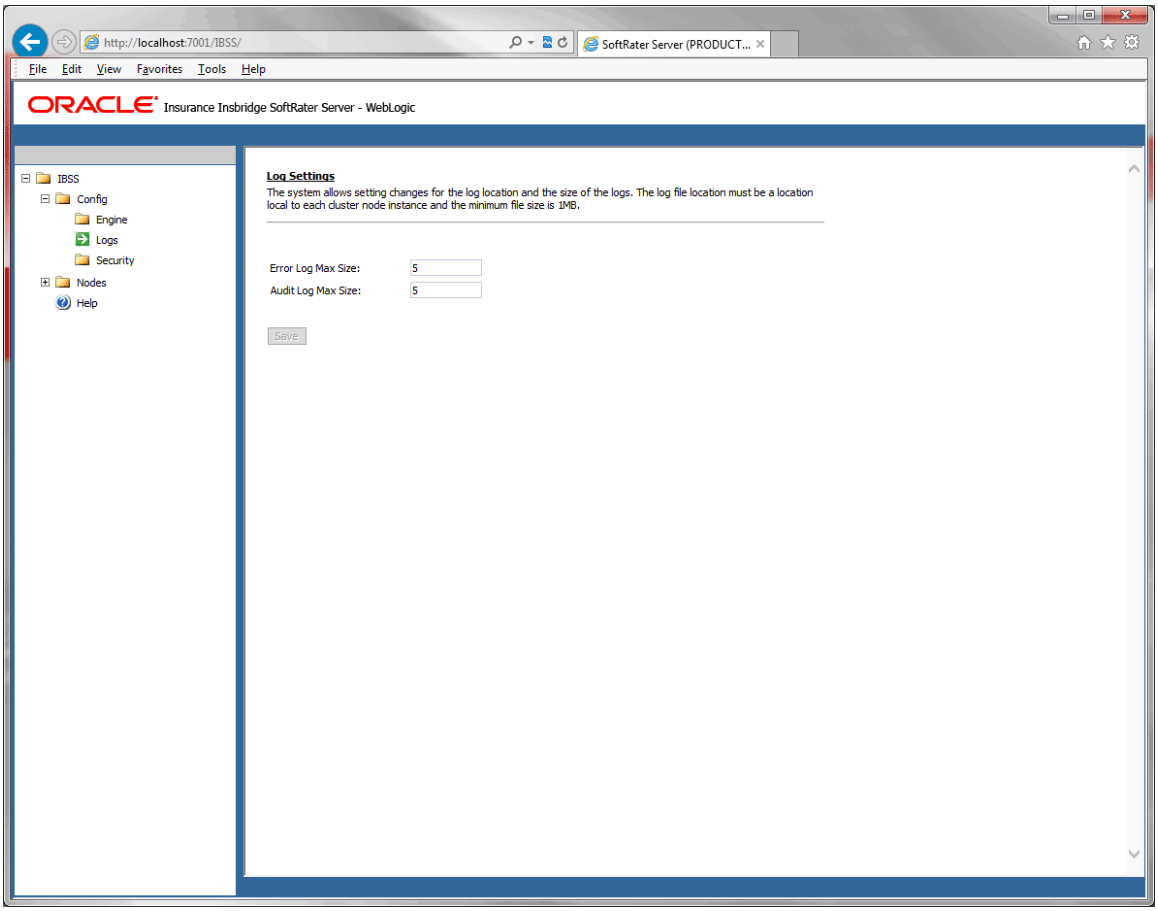


Figure 36 Logs Page

To set the size, enter in a number and click Save. After making a change you must reset the environments for every node in order for the changes to be activated. The option to reset environments for every node is on the Nodes folder. The reset happens immediately.

SECURITY

The security page is where the administrator can turn on or turn off authentication for IBSS. The default is for security to be on. Security is enabled at installation but can be disabled at a later time. When security is enabled, a login and password will be required. If users do not have a login and password, no section of IBSS will be available to them. If security is disabled, at the next instance of IBSS, no login screen is presented.

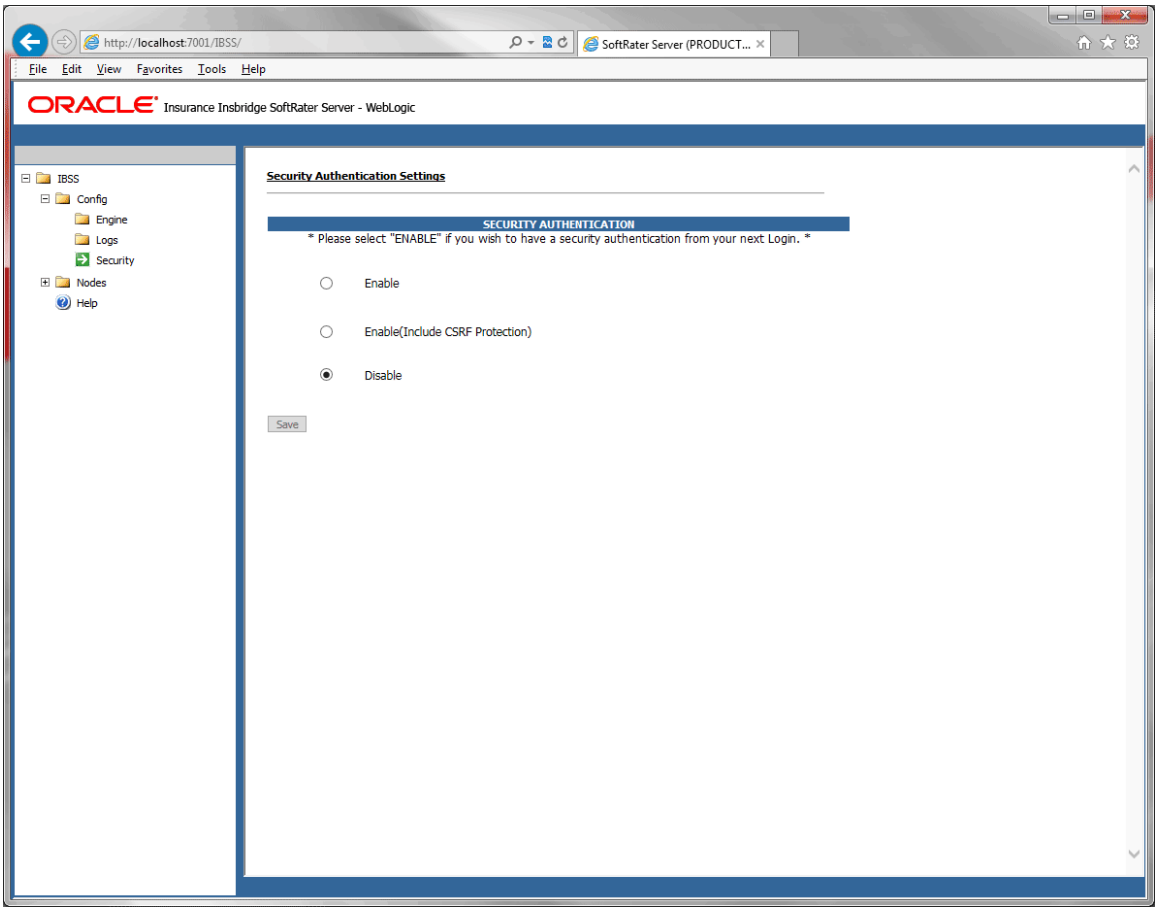


Figure 37 Security Disabled

The Enable (Include CGSF Protection) is application security to help protect against a cross site request forgery (CSRF) attack.

Security Enabled

Security is enabled by default; users are presented with a login screen. A user name and password must be entered to gain access. Information regarding the status of the system is presented but will not be accessible. The default is for security to be enabled.

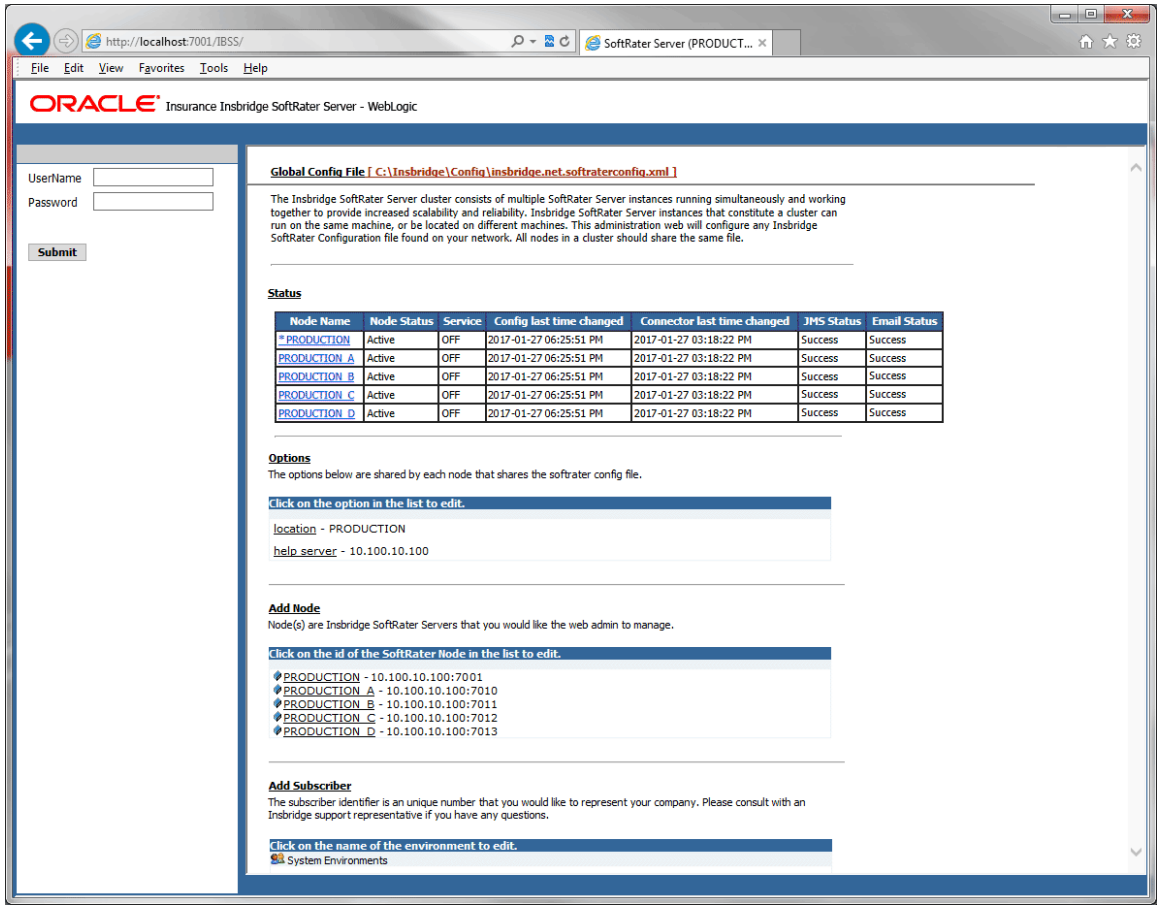


Figure 38 Security Enabled in IBSS

When Security is enabled, a default user “admin” with a default password of “insbridge” is assigned. This is the user name and password to be used the first time you enter IBSS. It is strongly recommended that the password be updated at the first log in.

Logging Out

A Logout option is presented when security is enabled.

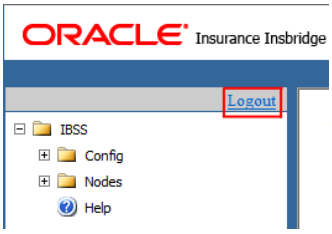


Figure 39 Logging Out of IBSS

Users should log out of IBSS when finished. The Logout option is at the top of the side menu. If IBSS closes, the session may not close, leaving the user logged in. If the Logout option is not present, security is not enabled.

Change Password

The Change Password screen is available only when security has been enabled.

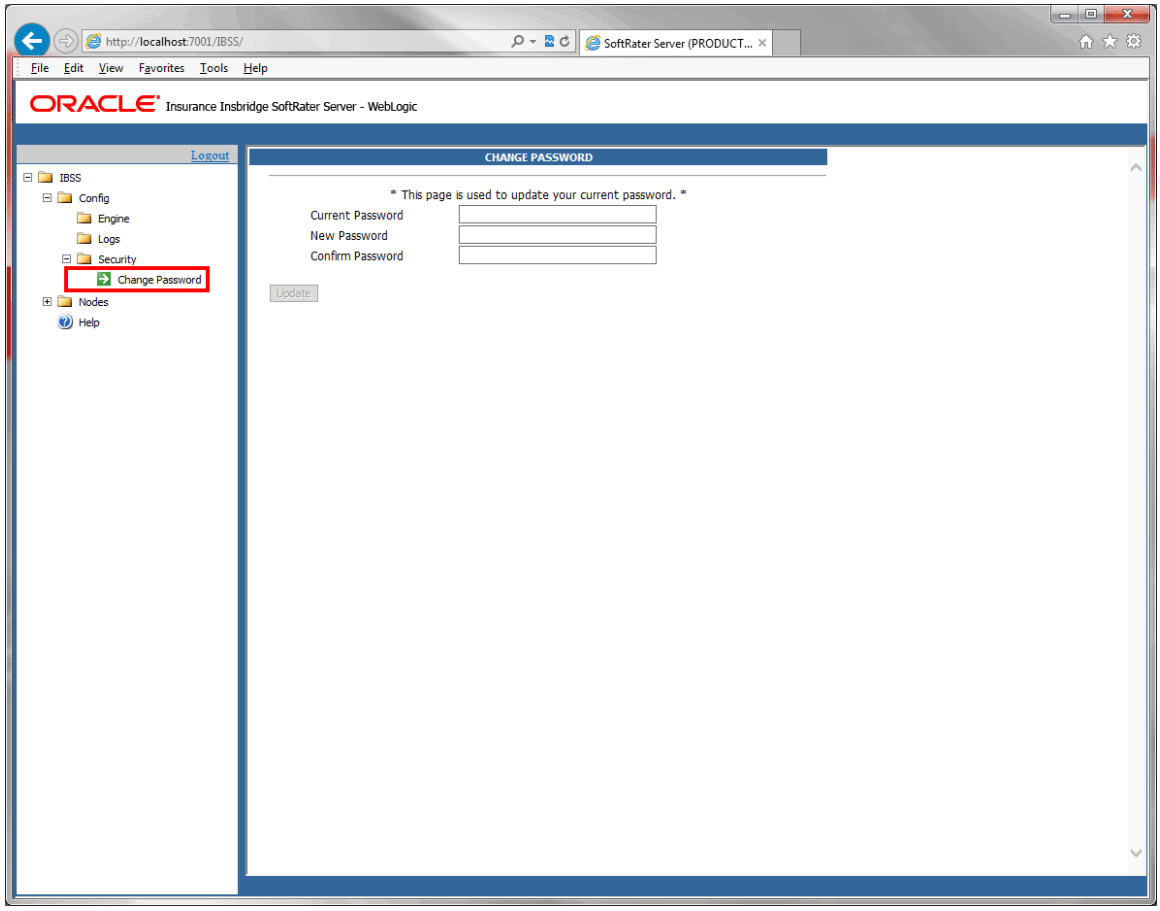


Figure 40 Changing Password

Changing Default Password for Security Authentication

1. From the IBSS home page, navigate to security.
2. Under the security menu, select the option to Change Password. The Change Password screen is displayed.
3. Enter the default password in the Old Password field.
4. Enter a password of your choosing in the New Password and Confirm Password fields. Passwords should be between 5-12 characters.
5. Click Update to update your password.

6. After changing your password you must reset the environments for every node in order for the changes to be activated. The option to reset environments for every node is on the Nodes folder. The reset happens immediately.

Password Rules and Behavior

- If the length of the password entered in any field is less than 5 characters, the error message "**Password length should be between 5-12 characters**" is displayed next to the corresponding text field.
- The Update button gets enabled only when all the three fields are populated.
- If the values entered in the New Password and Confirm Password fields do not match then error message "**Passwords do not match**." is displayed in the screen.
- When the mandatory fields are updated, the password value is encrypted.
- This encrypted new password value is updated in the insbridge configuration xml file.

Resetting the Password

For security purposes, information regarding resetting a lost or forgotten 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/.

NODES

The nodes folder holds the shared functionality available to all nodes and the details and functionality available to each individual node. To view the details of an individual node, expand the Nodes folder and select the node where you want to view or edit details.

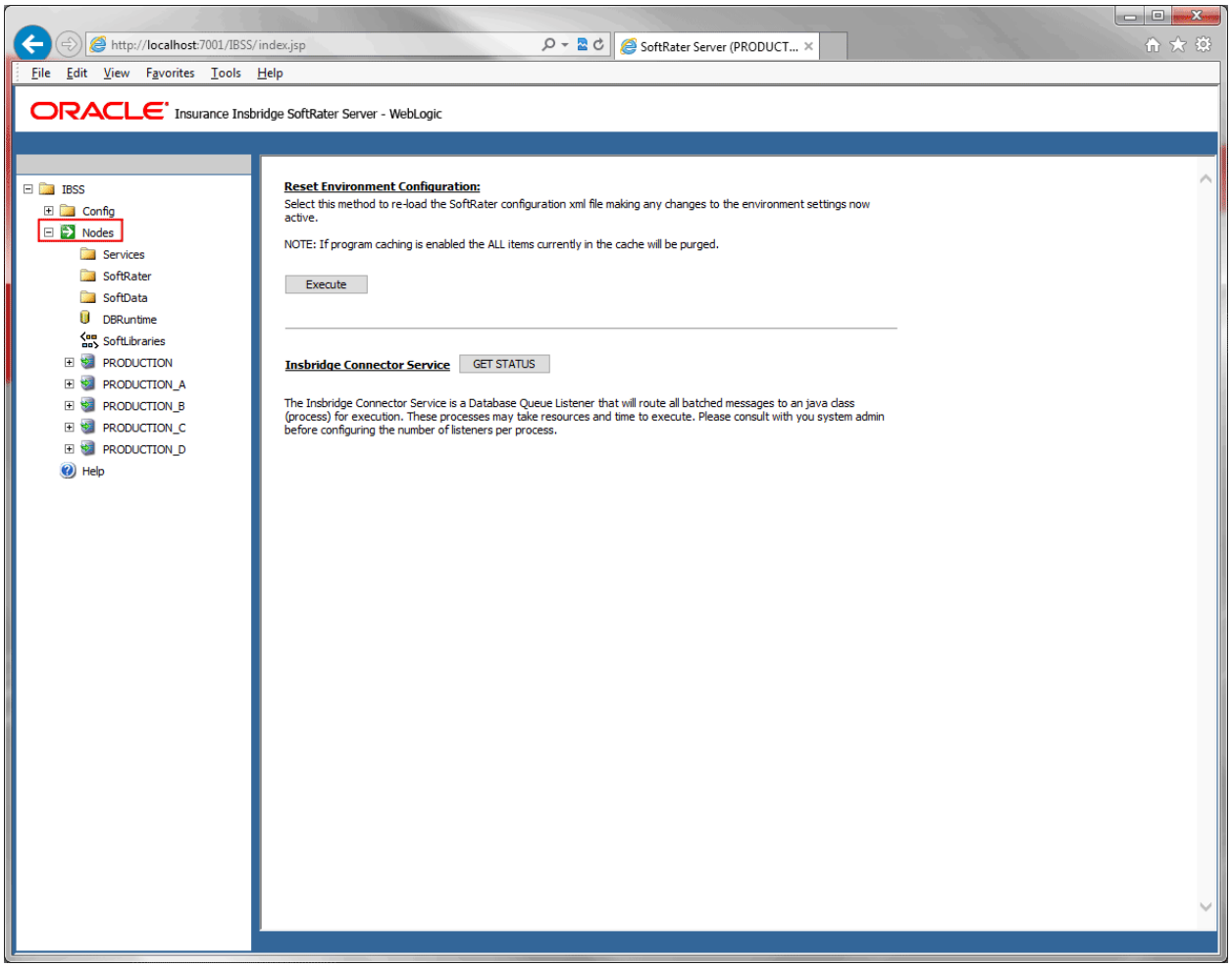


Figure 41 Node Management Window

To view the options that apply to every node in the cluster, select the Nodes folder and the underlying folders. The available options are:

- There are two options on the Nodes page:
  - **Resetting Environments for every node:** Resets the environment for every node in the cluster.
  - **Insbridge Connector Service:** Get status and set properties for every node in the cluster.
- **Services:** Manage Insbridge Connector Service, Message Process and Insbridge Task Manager.

- **SoftRater:** Test input files against loaded packages.
- **SoftData:** Test SoftData requests.
- **DBRuntime:** Test DBRuntime requests.
- **SoftLibraries:** Manage SoftLibraries.

Reset Environments

The option to reset environments for every node is on the Nodes folder. Resetting environments reloads the config.XML file. Environments may need to be reset to activate changes. Changes do not take effect until the SoftRater configuration XML file is reloaded. The reset happens immediately.

NOTE: *Resetting environments causes all information in the cache to be purged and any transactions currently processing could be made invalid.*

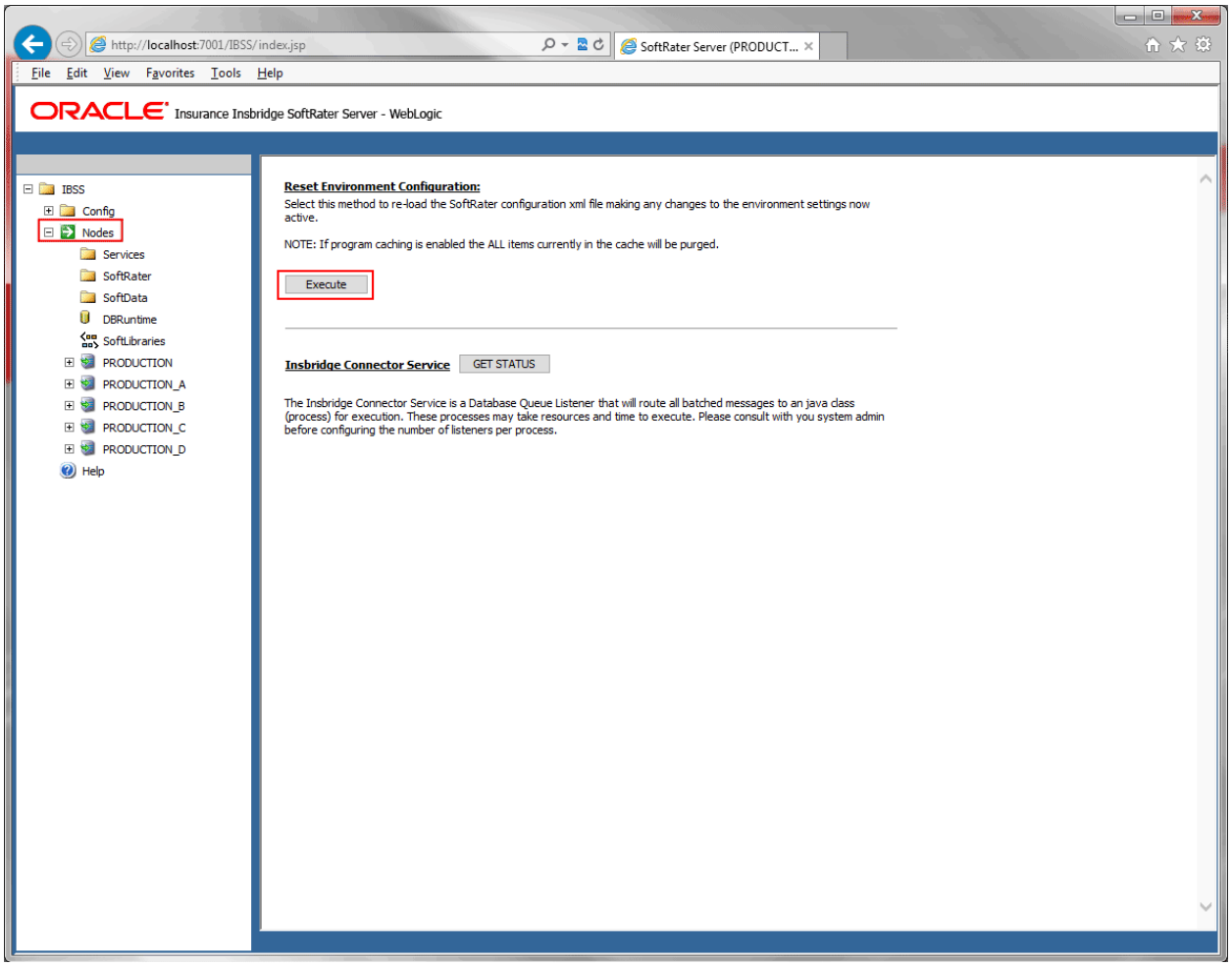


Figure 42 Resetting a Node

1. Click the Execute button. A confirmation window is displayed.

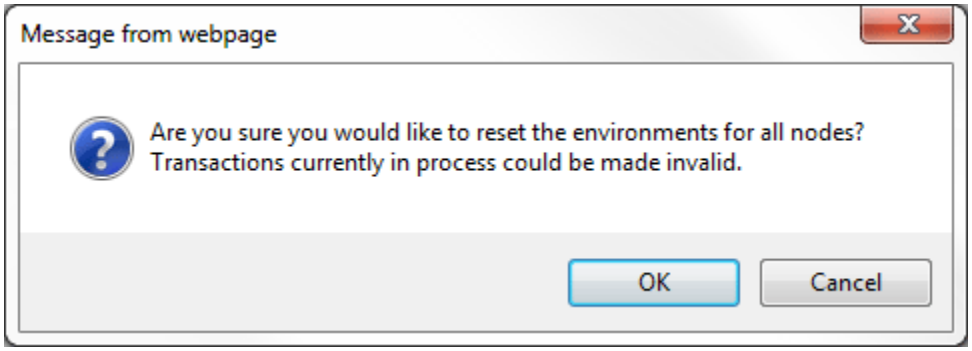


Figure 43 Confirming a Node Reset

2. Click OK to reset the environment. Click Cancel to return to the previous screen. No action will be taken.

3. The screen refreshes and the environments have been reset.

4. Confirmation is displayed with a success or fail message.

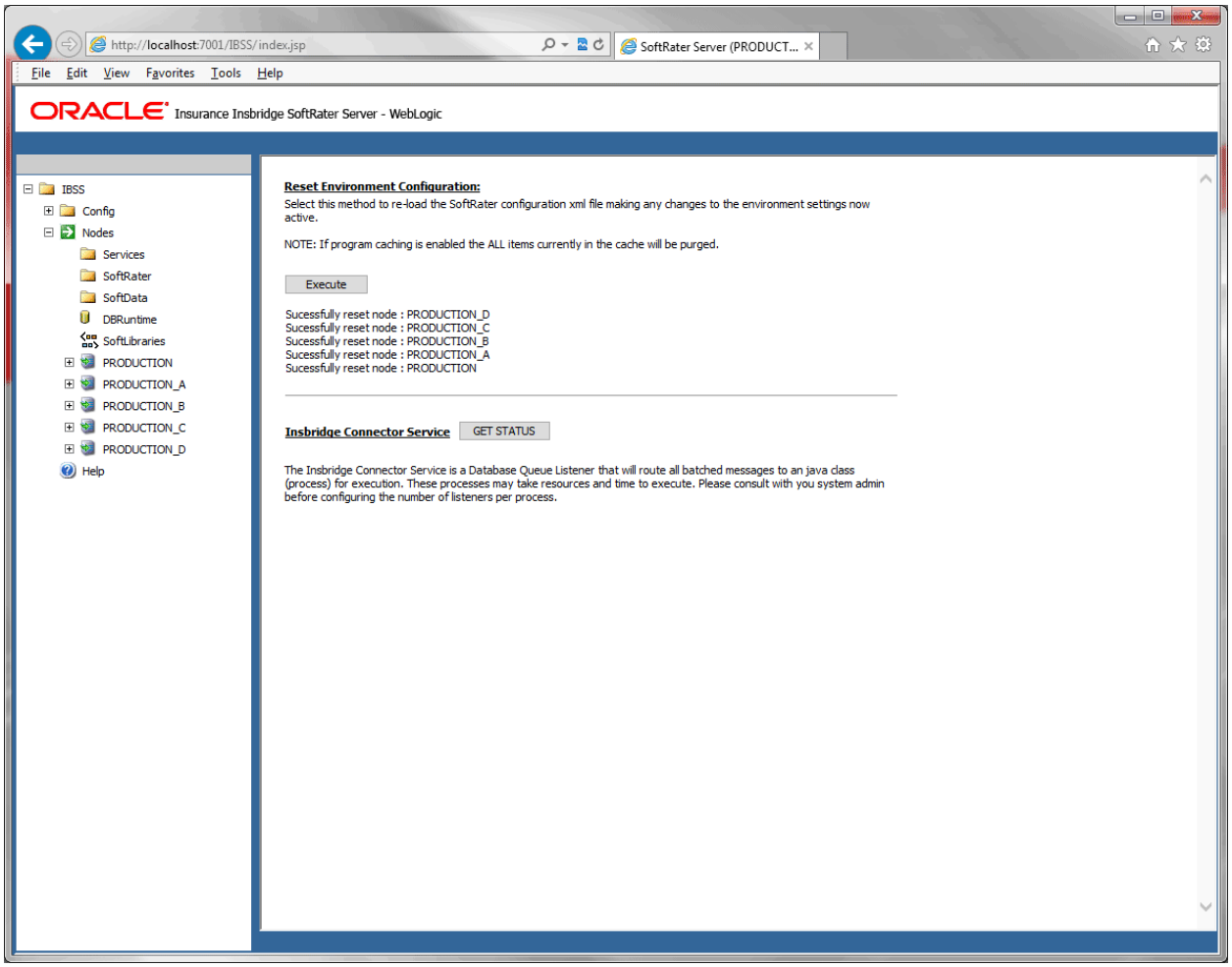


Figure 44 Successful Reset

Insbridge Connector Service

The Insbridge Connector Service is a database queue listener that routes all batched messages to a java class process for execution. The Insbridge Connector Service on the Nodes page is where you can get the status for every node in the cluster.

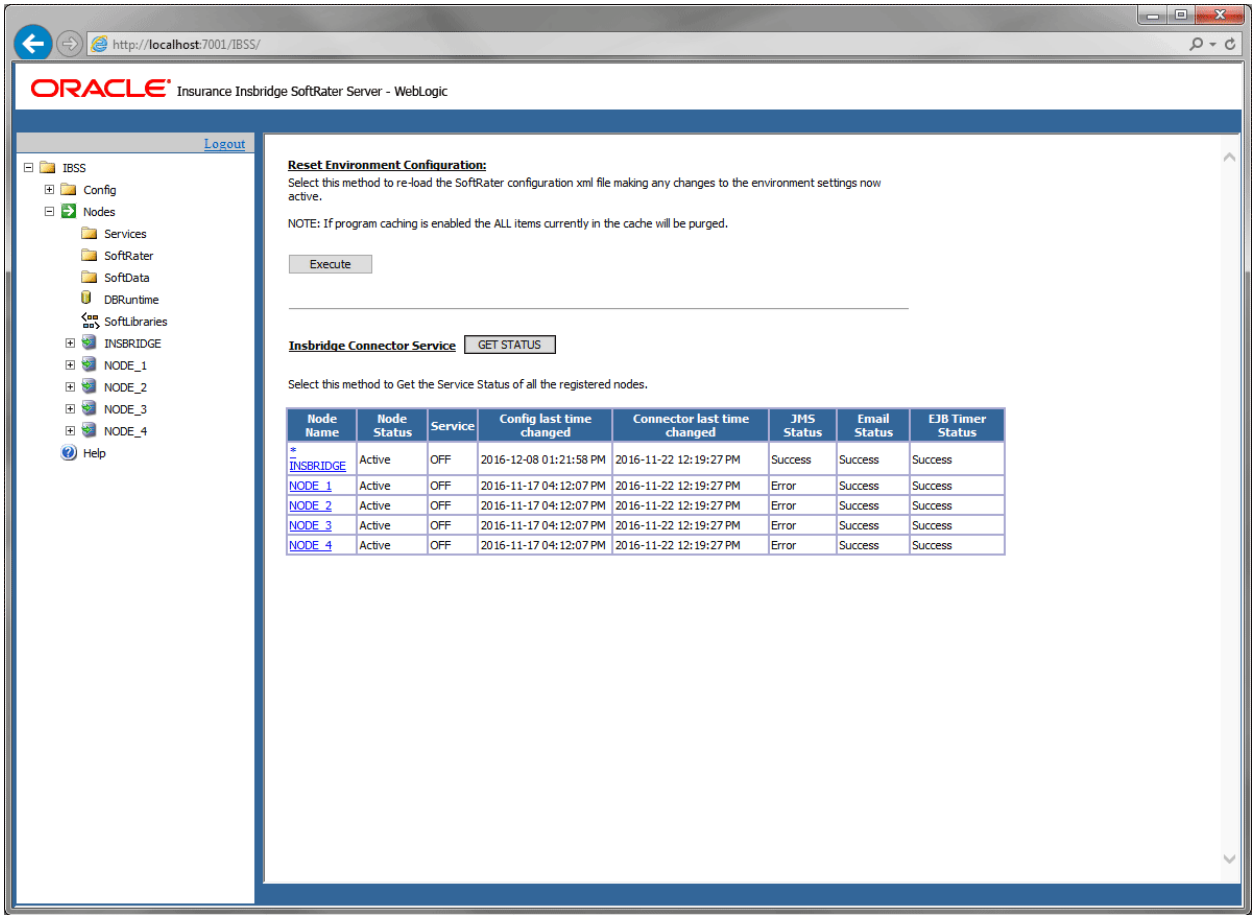


Figure 45 Insbridge Connector Service

Clicking the Get Status button returns the status of every node. The statuses are active, not active, or unable to start. Check Nodes that cannot be started to make sure they are active. Only active nodes can be started.

Other information on the page is the time stamp for the last time the config was reset, and the last time the Connector was changed. JMS and email status are also listed.

An asterisk (*) at the front of the node name indicates the node you are currently on.

SERVICES

The Nodes Services page allows you to start and stop the Insbridge Connector Service, view messages, and enter properties for Insbridge Task Manager. The properties entered here apply to every node in the cluster.

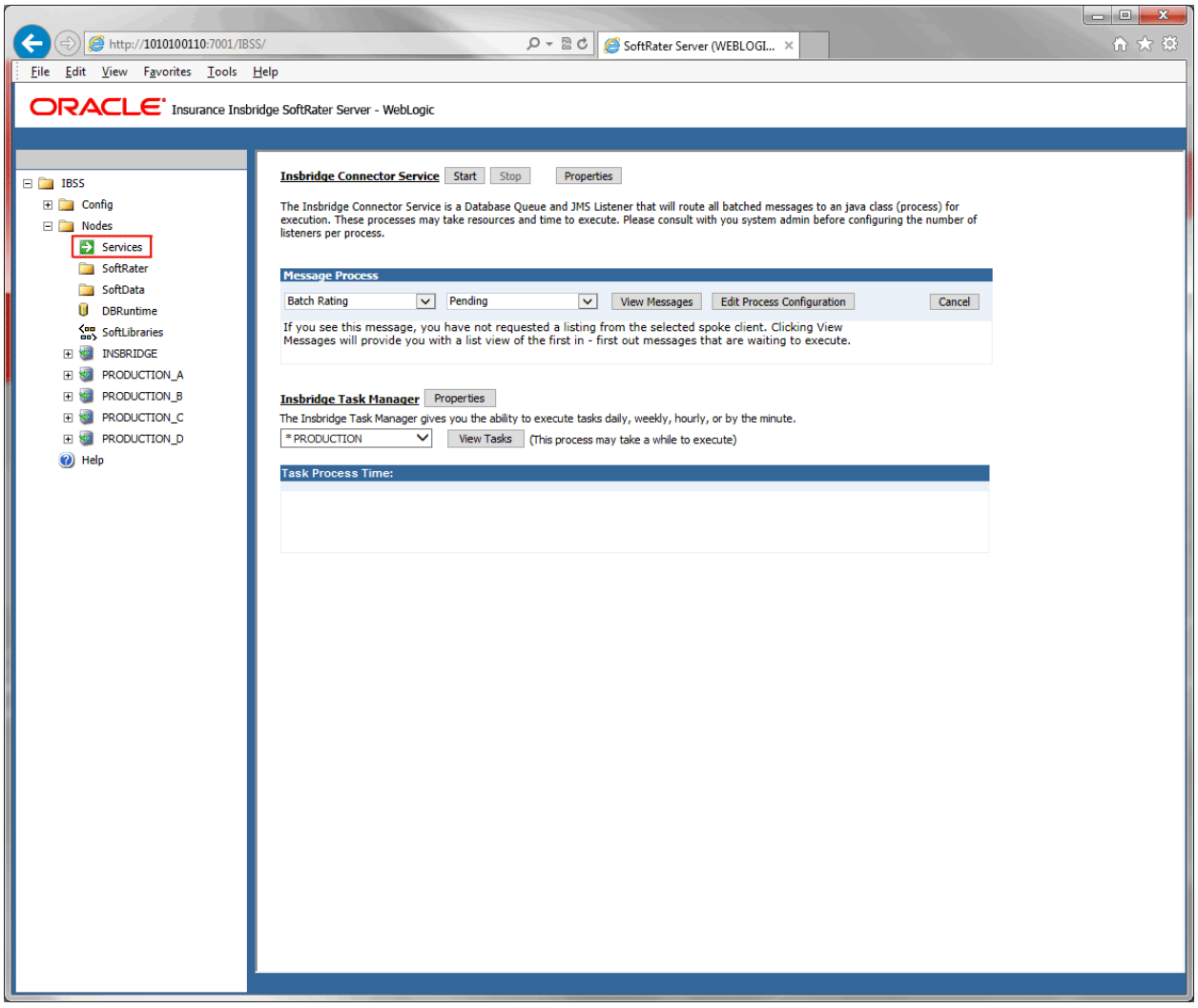


Figure 46 Nodes Services

Insbridge Connector Service Options

The Insbridge Connector Service is a Database Queue and JMS Listener that routes all batched messages to a java class (process) for execution. The Insbridge Connector Service has three buttons:

- **Start:** Starts all the connector services for every node in the cluster. Only active nodes can be started.
- **Stop:** Stops all connector services for every node in the cluster. Only active nodes can be stopped.

- **Properties:** Sets the connection service properties for every node in the cluster.

Setting Insbridge Connector Properties

The Insbridge Connector Service is a database queue listener that routes all batched messages to a java class process for execution. Properties must be set up prior to using. There are three areas that should be completed. The first area sets the number of jobs and the number of threads per job. The next area is for notifications. Notification details need to be configured in order to receive the email response for successful/failed batch transactions. The third area is required for batch and is where JMS settings are entered.

1. Locate the Services screen under the Nodes options. IBSS > Nodes > Services.

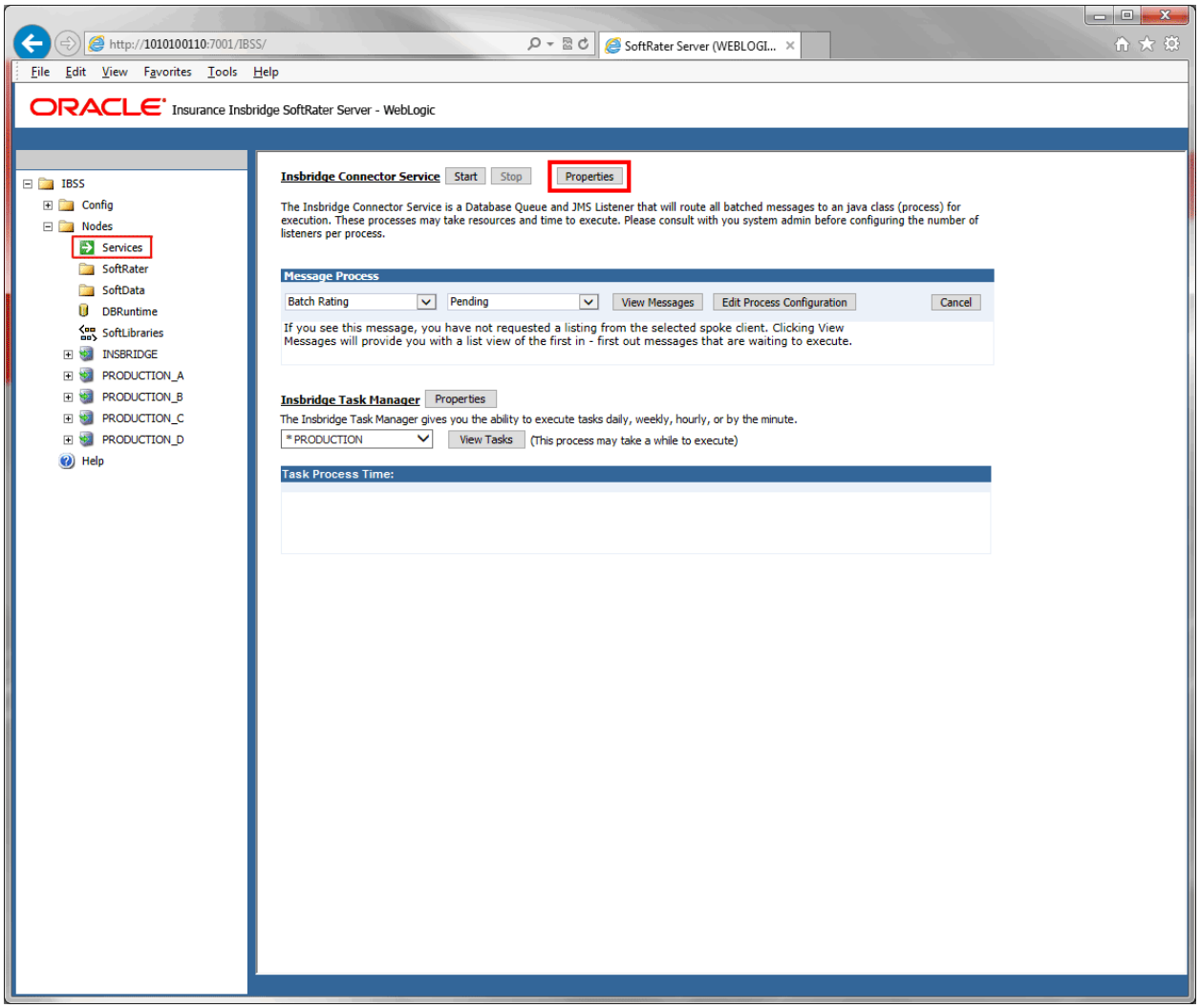


Figure 47 Properties Option on Services Page

2. Click Properties. A separate screen is displayed.

3. Enter values for the Insbridge Connector Service.

Configuring Threading in IBSS:

The Maximum Simultaneous Jobs entry is where the IBSS system administrator can enter in the number of jobs to be run by the system. The Maximum Threads per Job is the maximum number of threads that need to be executed. Threading can be set to any number required and applies to every job. So if you have 5 jobs and ten threads per job, you will have a total availability of fifty threads.

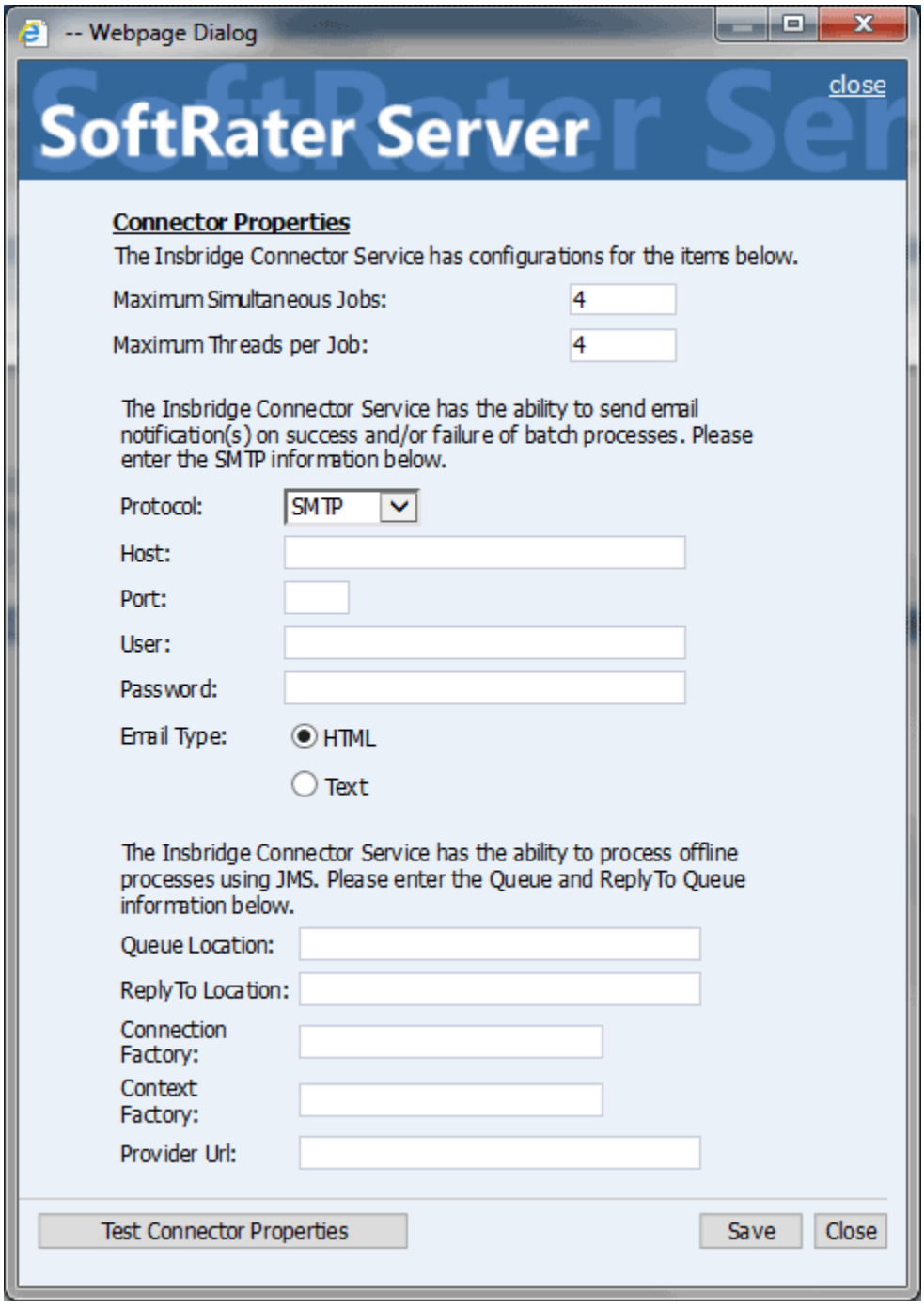


Figure 48 Insbridge Connection Properties

Enter the values and click save. The Test Connector Properties does not return a response for thread values.

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.

Thread and job settings are not required. A default of 1 is used if no entry is made.

Configuring Email Communication in IBSS:

The second segment holds email notification information that is used for batch. This is the email that is used when email notification is requested for a batch. The service cannot send notification emails until that information is entered and verified.

If an email is not required or email needs to be disabled, select the NONE option for protocol.

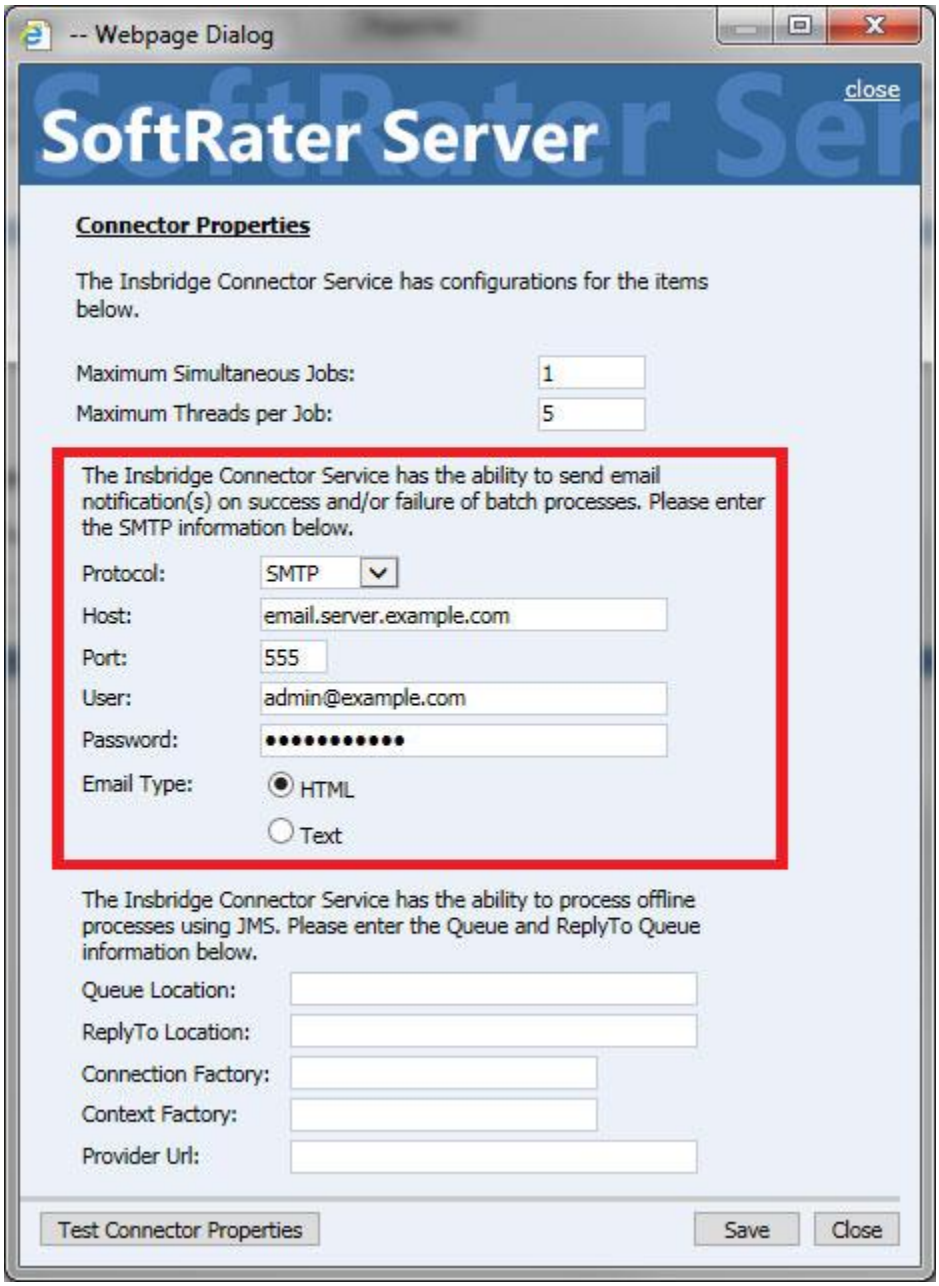


Figure 49 Insbridge Connection Properties for Email

1. All fields require an entry. Enter values for:

    - **Protocol** - SMTP or SMTPS or JNDI or NONE

- **Host** - email host
- **Port** - port used
- **User** - Login id
- **Password** – Password
- **Email Types** – HTML or Text

2. Click **Save**.

3. Click **Test Connector Properties** to verify your entry. A successful connection will be displayed if the email was sent. The recipient also receives a message in their email. A failed connection message is displayed if a connection cannot be made. Please see logs for more details.

Configuring JMS in IBSS:

JMS must be setup in the application server prior to entering queue details. JMS is required for async batch processing. Batches can be set to run asynchronously. If you select to run a batch asynchronously the batch runs in the background and, optionally, notifies the email address entered in the email section when the action is complete. For more on Batch Setup, please see the Batch Setup Guide.

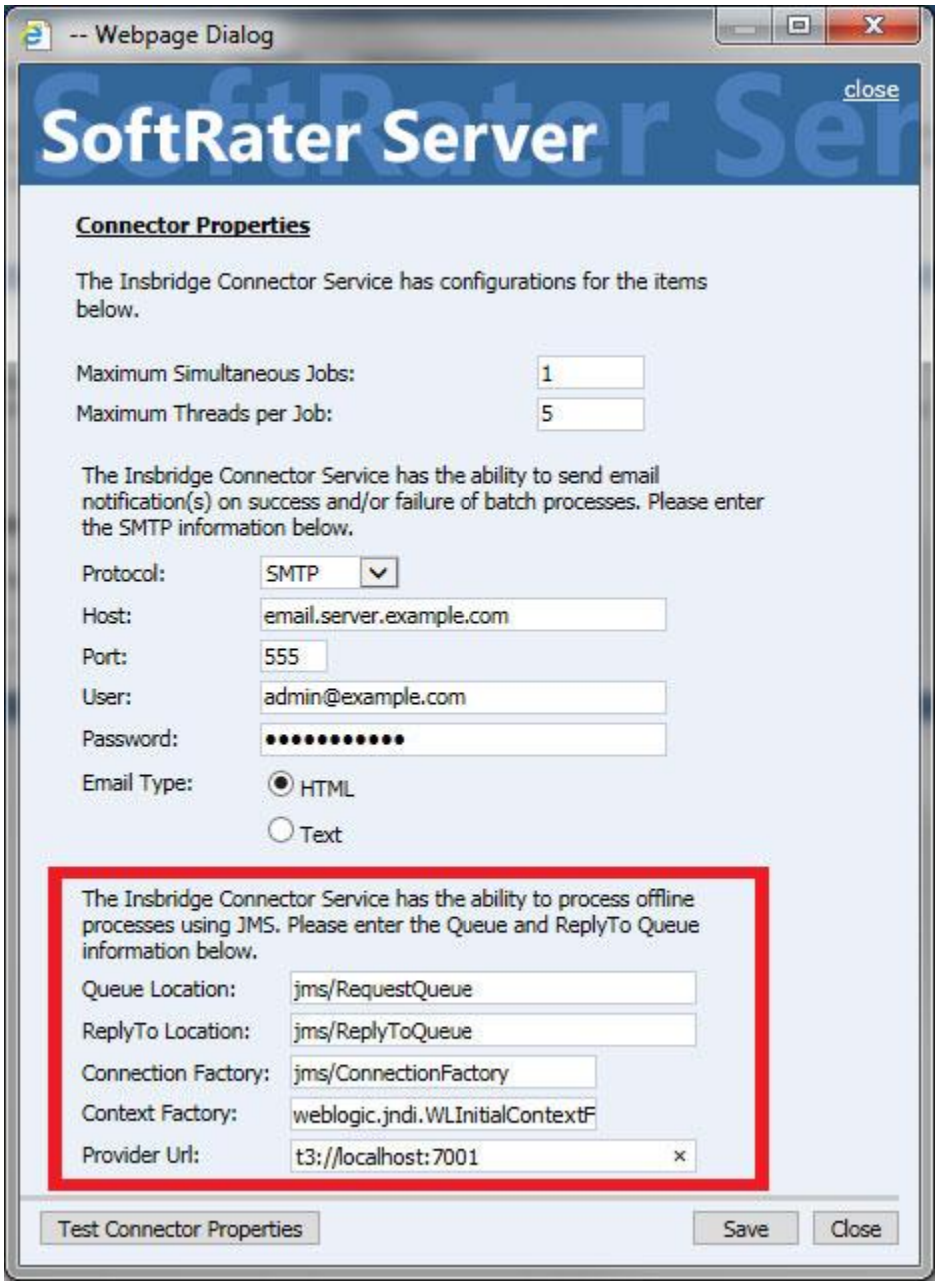


Figure 50 Example Insbridge Connection Properties for WebLogic

1. All fields are required in order to configure queues:

    - **Queue Location** - JNDI Name of the Request Queue

- **ReplyTo Location** – JNDI Name of the Reply To Queue
- **Connection Factory** – JNDI Name of the Queue Connection Factory
- **Context Factory** – context factory value for application server
- **Provider URL** – iiop://<machine_ip_address>:<server_bootstrap_address>

2. Click Save

3. Click **Test Connector Properties** to verify your entries.

Test Connector Properties

Verify your entries prior to using.

A successful setup returns a success message.

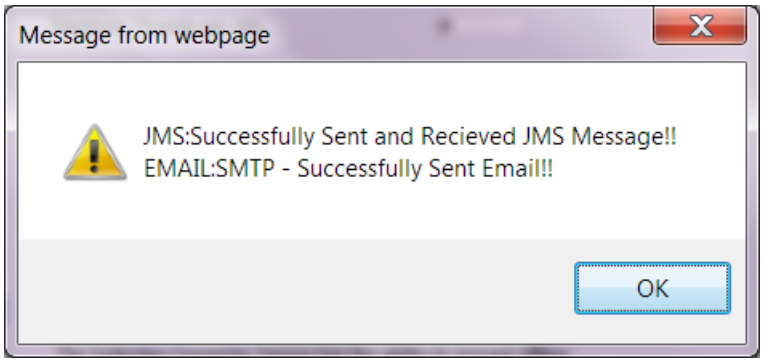


Figure 51 Successful Insbridge Connection Properties Setup

This message means that the JMS Connection was successful, and a sample mail will be sent to the email ID that is configured in the properties.

A message failure indicates where the message failed.

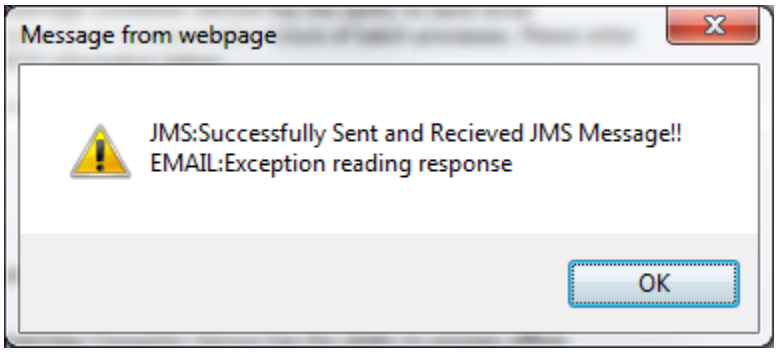


Figure 52 Failed Insbridge Connection Properties Setup

In this example, no SMTP server was set up on the server.

Starting and Stopping Insbridge Connection Properties

After configuring the Insbridge Connector Properties, you can start the service by clicking the Start button. A status for each node is displayed.

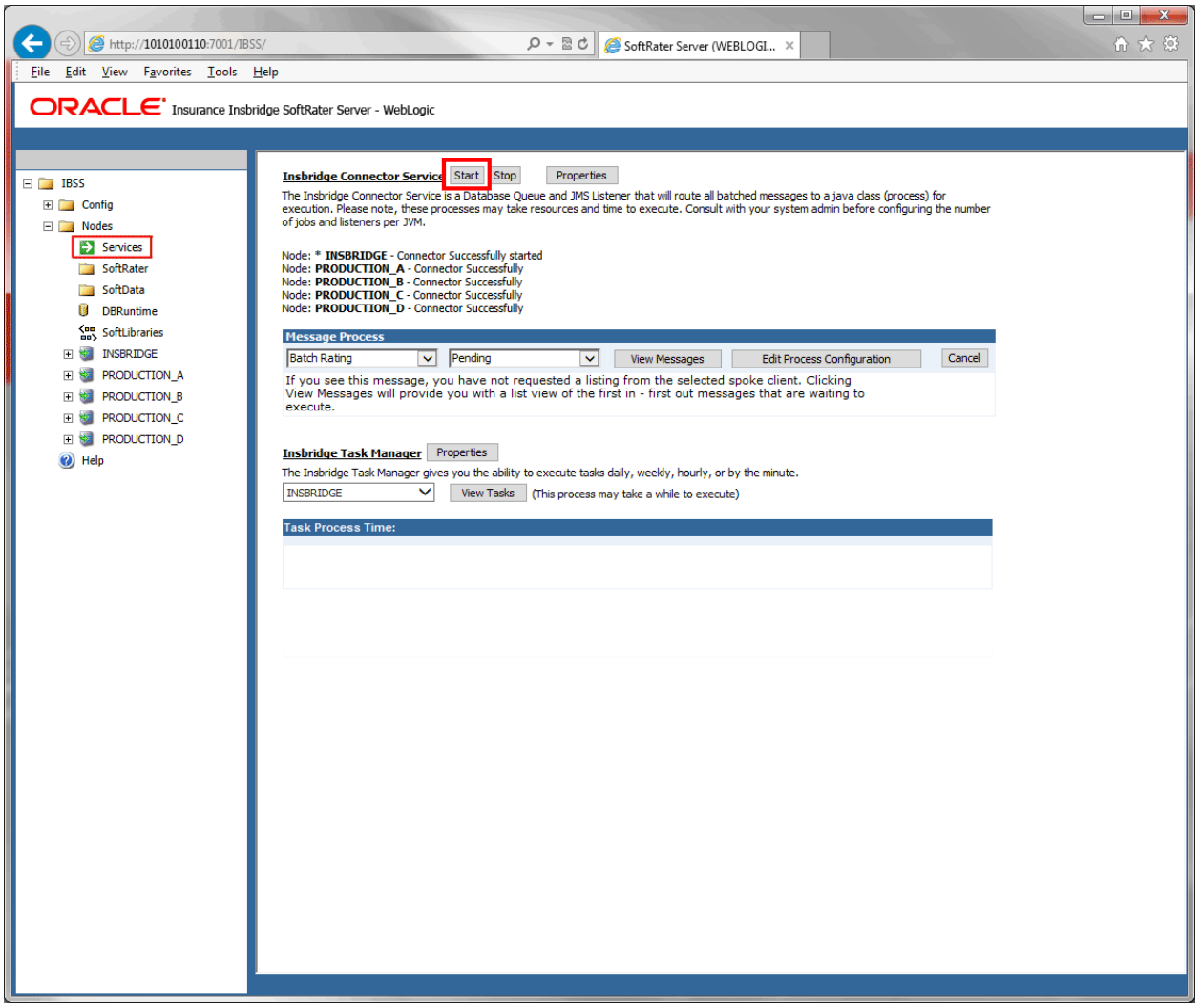


Figure 53 Services page with Services Started

Only active nodes can be started. If a node cannot be started, an error message will be displayed.

Message Process

The Message Process is a queue and database listener for Batch and Impact Analysis requests. The Message Process listens to the JMS Request Queue and the JMS Response Queue for JMS Request and JMS Response messages. The Message Process also listens to the Assembly Process Table for Batch and Impact Analysis requests. Each queue operates on a first-in, first-out basis. This allows you to keep track of the requests that are submitted to the engine for rating. Various request types like Batch Rating, Impact Analysis, JMS Request, and JMS Response messages can be viewed in the Message Process option.

You can view or get the status of the request, cancel the request before the engine picks it up for processing, abort a request that is processing, and purge the completed/failed/cancelled/aborted requests.

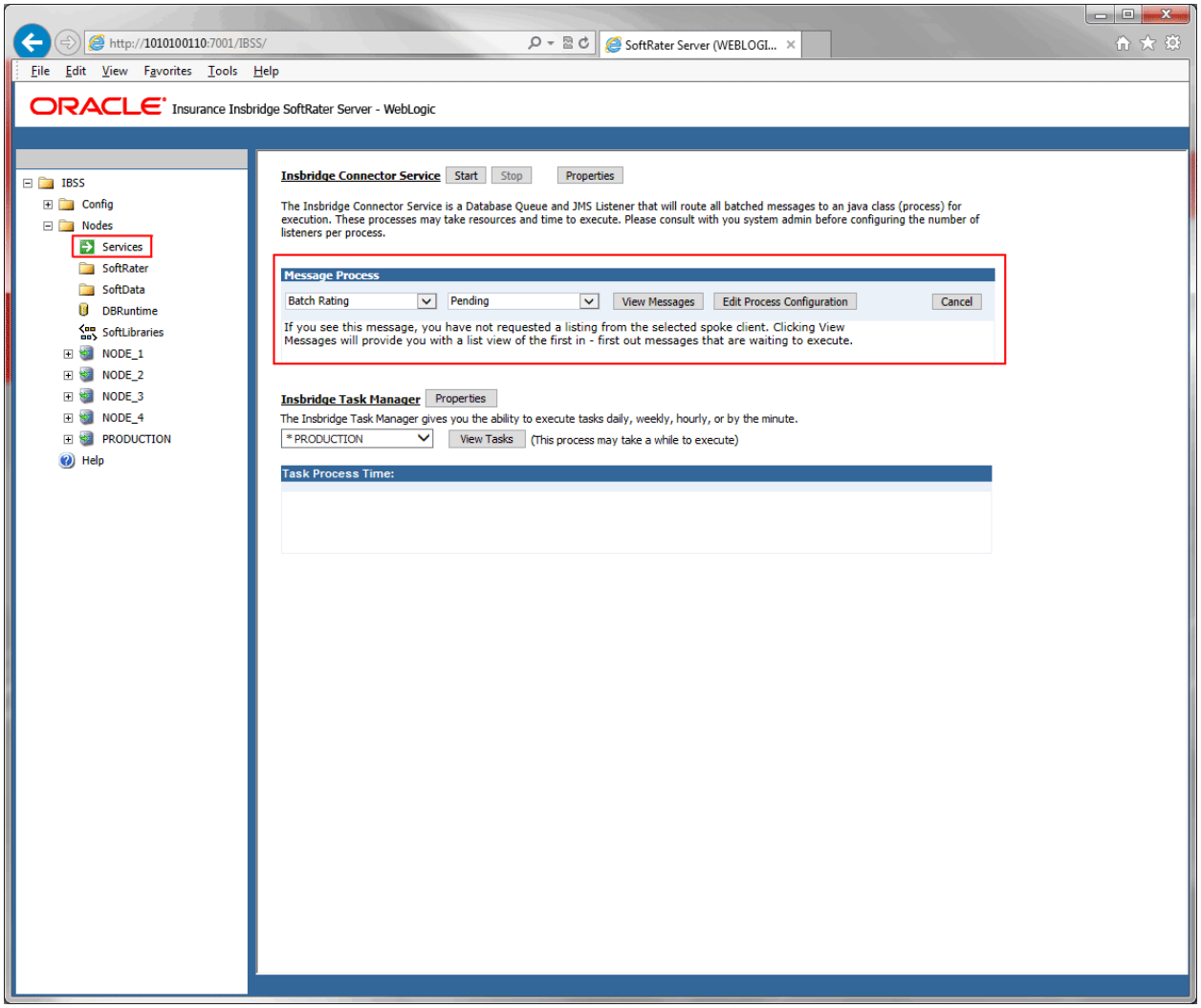


Figure 54 Batch Message Information

1. Navigate to the **Services** page.
2. Select the appropriate option.

- Batch Rating
- Impact Analysis
- Batch Export Data
- Batch Import Data
- Broker - Request
- Broker - Response

3. Select the status.

   - Pending
   - Processing
   - Completed
   - Failed
   - Canceled
   - Aborted

4. Click View Messages.

5. The listing shows any messages that are currently in the queue.

6. To view details on a specific message, click the underlined portion. Information about the message opens in a separate window.

7. To perform an action, click the button at the end of the section.

Statuses and Actions for Message Processing

Use Message Processing to keep track of the requests that are submitted to the engine for rating. The action you can take depends on the status selected.

Status Dropdown	Button Action
Pending	Cancel
Processing	Abort
Completed Failed Canceled Aborted	Purge

Statuses

Available statuses of a request after submitting to the engine:

Pending A request is first submitted to the engine with the status pending. This means that the engine has not picked up this request for processing. Pending requests can be canceled.

Processing As soon as the engine picks up the request, the status changes to processing. Requests that are in processing status can be aborted.

Completed After the engine has successfully processed a rate request, the status of the request changes to completed. A completed request message can be purged.

Failed If any error is encountered while processing the request, the status changes to failed. Details of the exception can be found in the corresponding logs. A failed request message can be purged.

Canceled After a request is submitted, you can cancel the request before it is picked up by the engine. This action changes the status from pending to cancelled. A canceled request message can be purged.

Aborted Requests cannot be canceled after being picked up by the engine. If the request is in a processing state, it can be aborted. Aborting a request stops the request prior to being completed. This changes the status from processing to aborted. An aborted request message can be purged.

Failed, canceled, and aborted requests will not be picked up by the engine for processing. The request has to be submitted again in order to be processed.

Actions

The action you can take depends on the status selected. After the status is selected, the button at the end of the section is updated with the corresponding action.

Cancel To cancel a request that has been submitted but not processed, select Pending as the status, then select the request you want to cancel and click Purge. This stops the request from being processed. A message is displayed that confirms this is the action you want to take.

Abort To stop a request that is currently being processed, select Processing as the status, then select the request you want to stop and click Abort. This stops the request from being processed. A message is displayed that confirms this is the action you want to take.

Purge To remove a message from the listing, select Completed, Failed, Canceled or Aborted as the status, then select the message you want to remove and click Purge. This removes the message from the listing. A message is displayed that confirms this is the action you want to take.

Purging a request removes all details corresponding to the selected request from the database/queue.

Edit Process Configuration

This option is where you enter the emails addresses where system notifications should be sent. Multiple names should be separated by a semicolon (;).

1. Locate the Services screen under the Nodes options. IBSS > Nodes > Services.

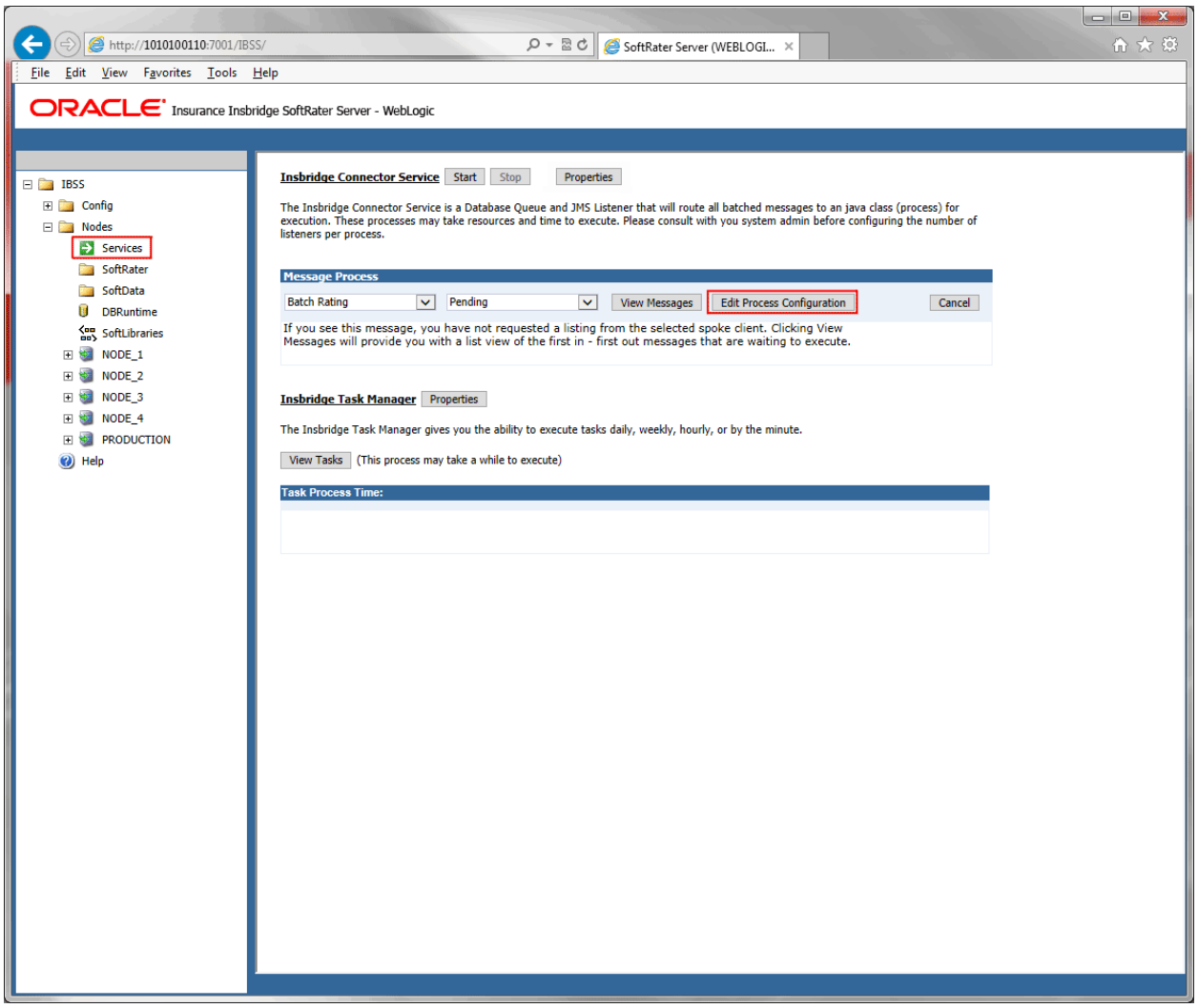


Figure 55 Edit Process Configuration Services

2. Click Edit Process Configuration. A separate screen is displayed.

3. Enter the email address to be used by the Insbridge Connector Service.

Figure 56 SoftRater Batch Engine Admin Email

4. Click Save.

The edit process configuration options vary according to the message process selected.

- Batch Rating allows for hundreds or thousands of policies to be rated. This option is useful when comparing rate changes in impact analysis. The edit process configuration for batch rating allows for email addresses to be entered. This is the email address where the completion or error email is sent.

- Impact Analysis is where batching and data analysis are performed. The edit process configuration for impact analysis allows for email addresses to be entered. This is the email address where the completion or error email is sent.

- Batch Export Data allows for the export of table data in Microsoft Excel format in RateManager. There are three fields:

  - Page size – the page size is used to control the streaming to file. A bigger page size may be faster but will consume more memory. The default is 1000.

  - Number of Rows in Memory for Excel – the number of Excel rows to held.

  - Local Repository Path – If the IBSS instance is on a non-Windows machine, a connection must be created so that IBSS can park files on the share drive. Instructions for creating a batch setup using a non-Windows machine are in the *Insbridge Batch Setup Guide*. The edit process configuration for batch export allows for the location of the non-Windows workfiles folder to be entered. This field is only to be used when working with a non-Windows machine. If IBSS is on a Windows machine, leave this field blank.

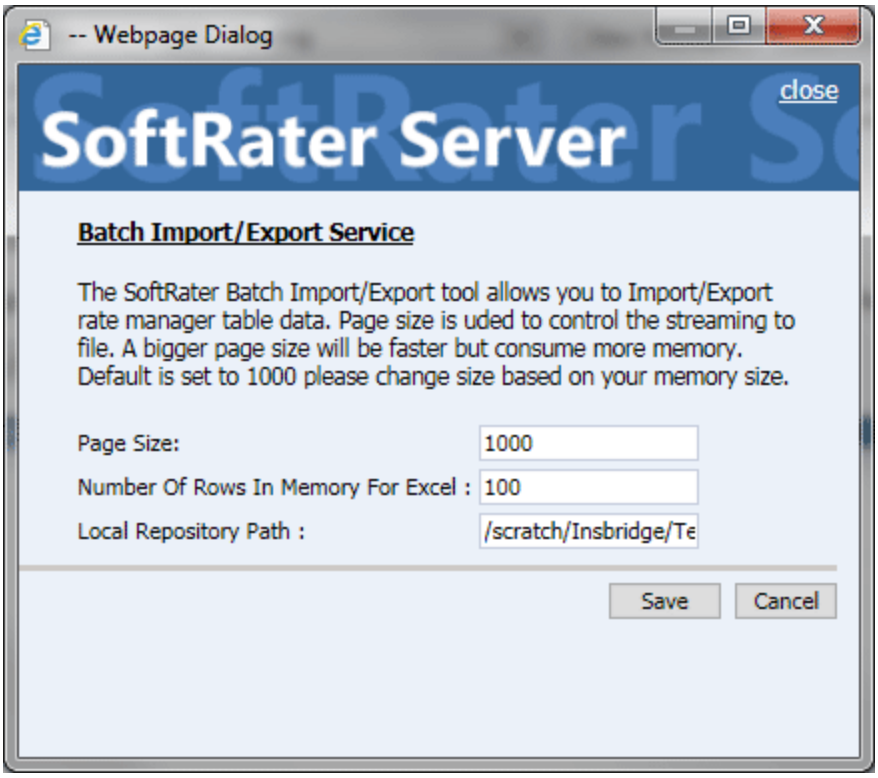


Figure 57 Edit Process Configuration for Batch

- Batch Import, Broker-Request and Broker – Response do not have edit process configuration options.

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.

NOTE: *When viewing tasks, the asterisk (*) indicates the node you are currently on.*

Setting Insbridge Task Properties

The properties set here apply to every node in the cluster. All intervals are in milliseconds.

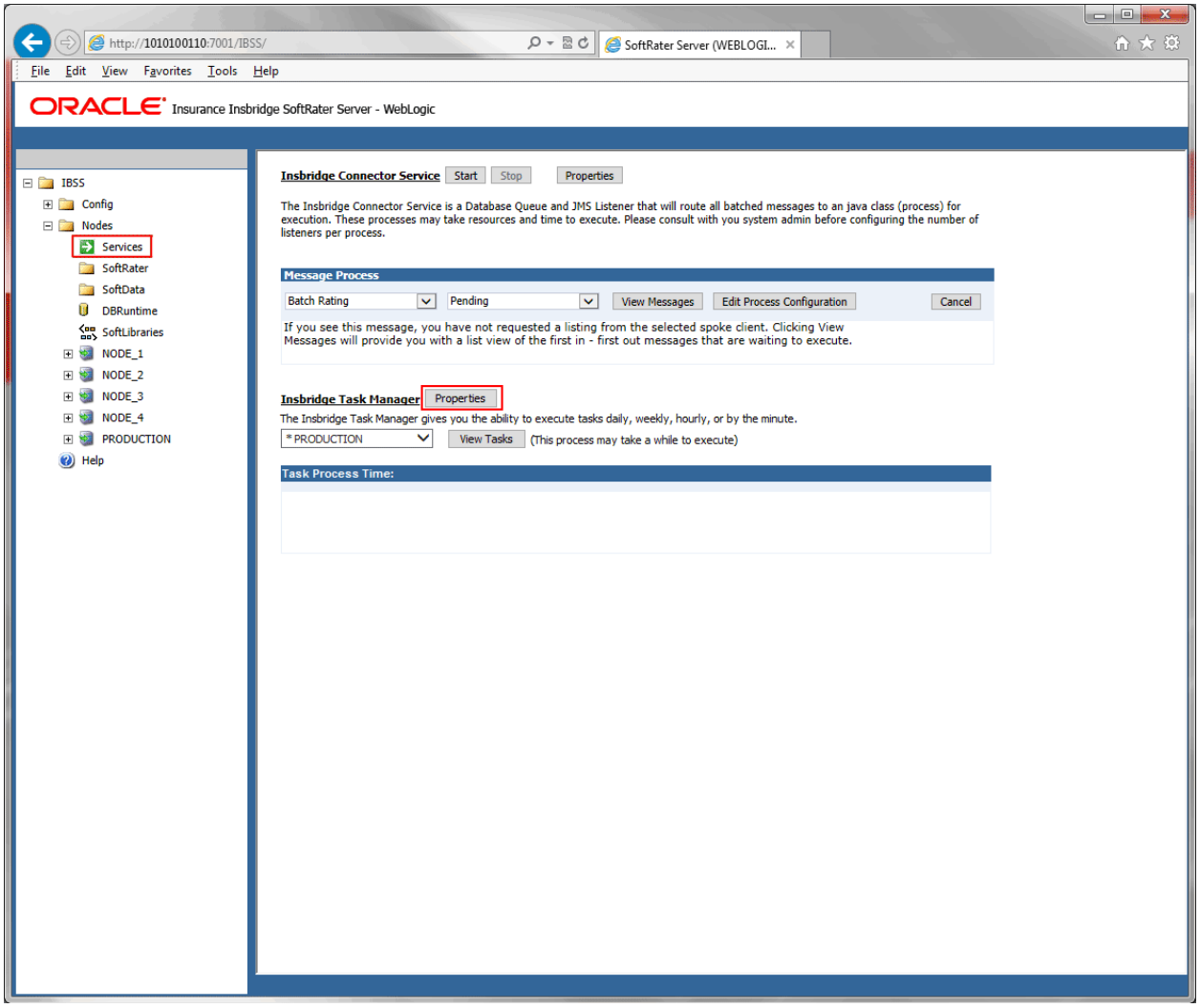


Figure 58 Setting Task Manager Properties

To set properties, click the properties button. A separate screen is displayed.

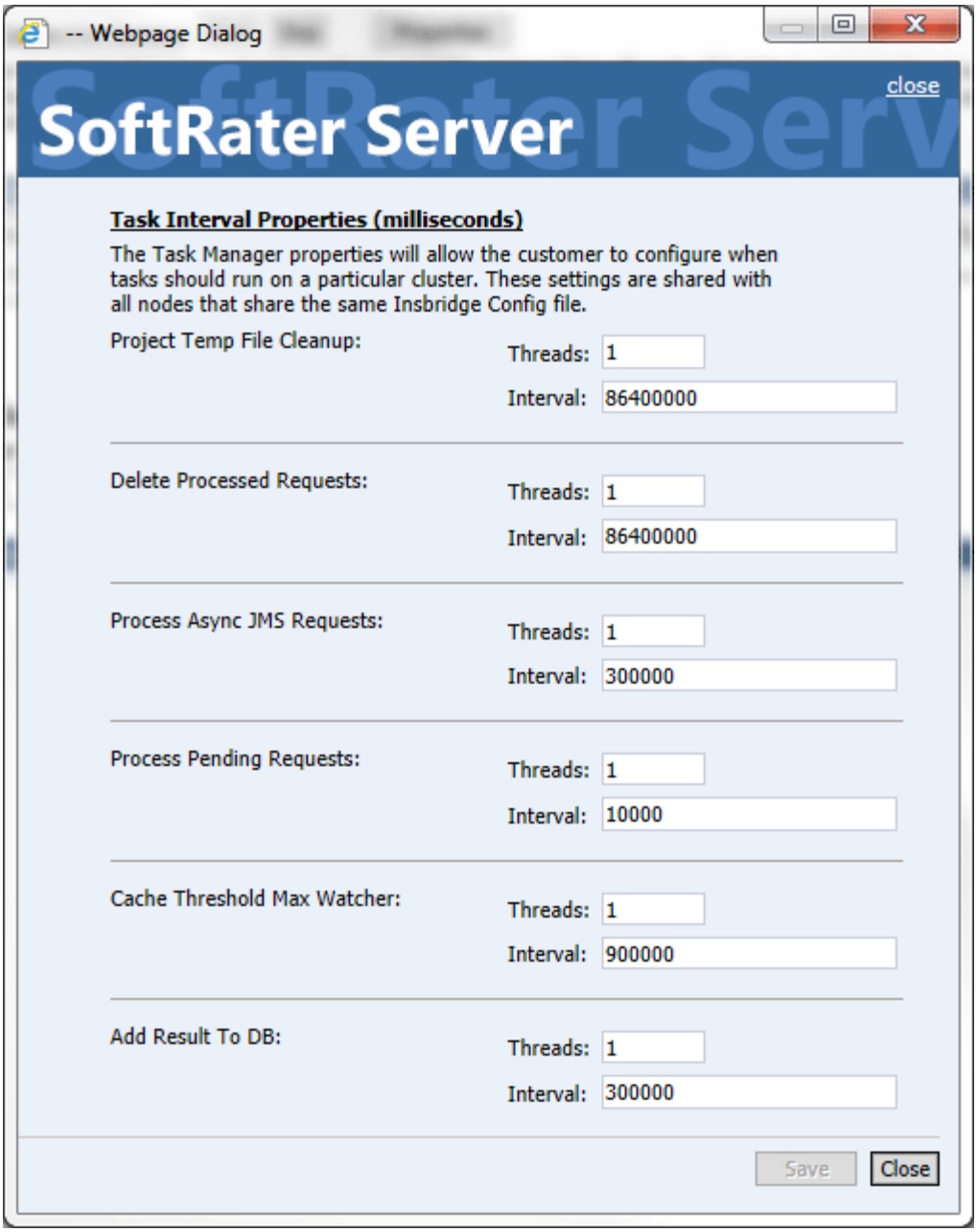


Figure 59 Task Manager

Enter the properties for:

- Project Temp File Cleanup:
- Delete Processed Requests:
- Process Async JMS Requests:
- Process Pending Requests:
- Cache Threshold Max Watcher:
- Add Result to DB:

Viewing Task Details

To view the currently scheduled tasks, click View Tasks and the tasks are listed. The View Tasks option lists all the tasks running for a particular node with the details of the Task Name, Interval between each execution, Last Runtime, and Next Runtime. This feature also details when the next task execution should take place.

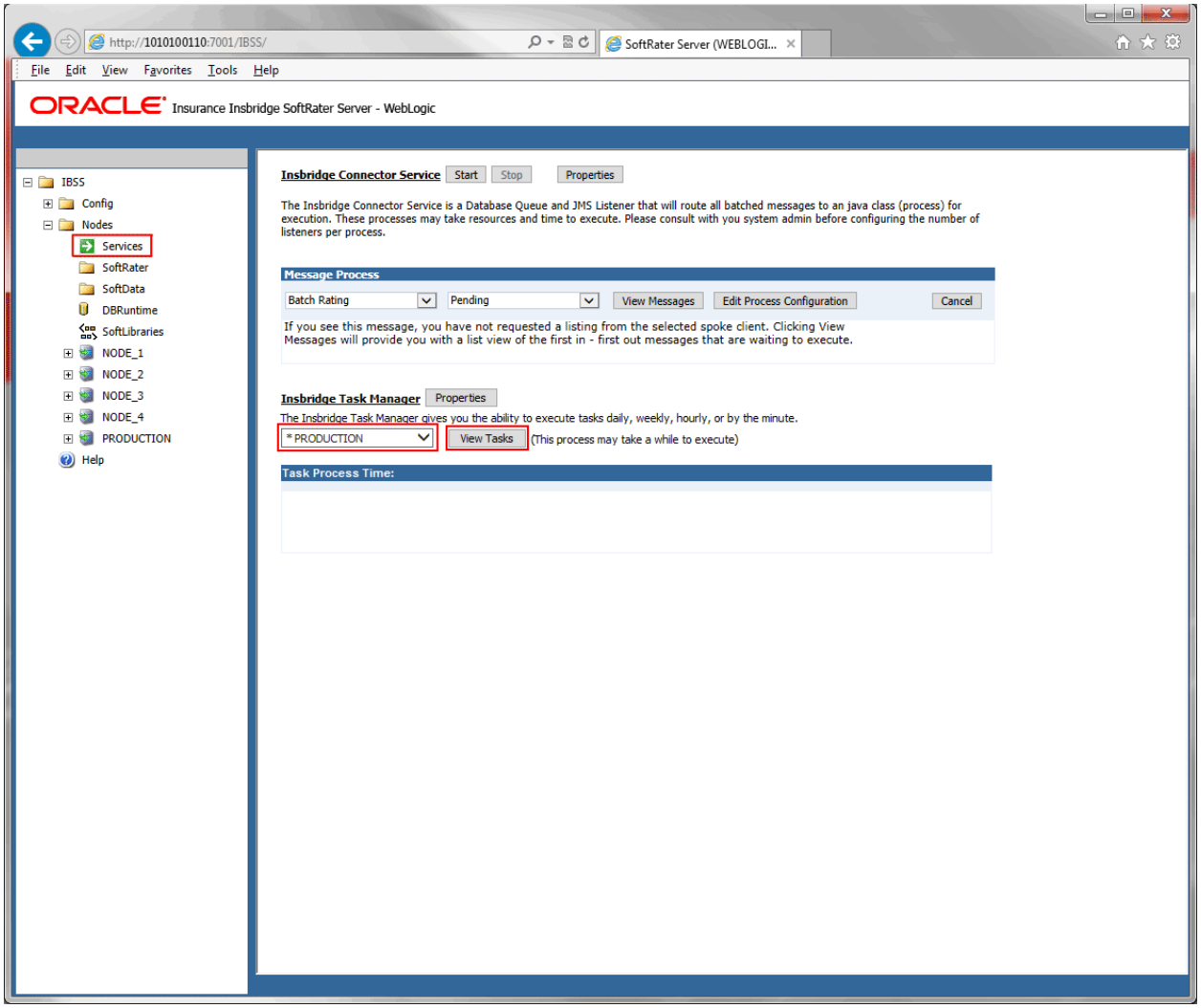


Figure 60 Viewing Tasks

Tasks are viewed per node. No changes can be made to tasks. These are view only.

1. Select the Node where you want to view tasks.
2. Click View Tasks.
3. Tasks are listed.

Chapter 6

SOFTRATER TEST INTERFACE

The SoftRater Test Interface is located under the Nodes section. It is available to every node. 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

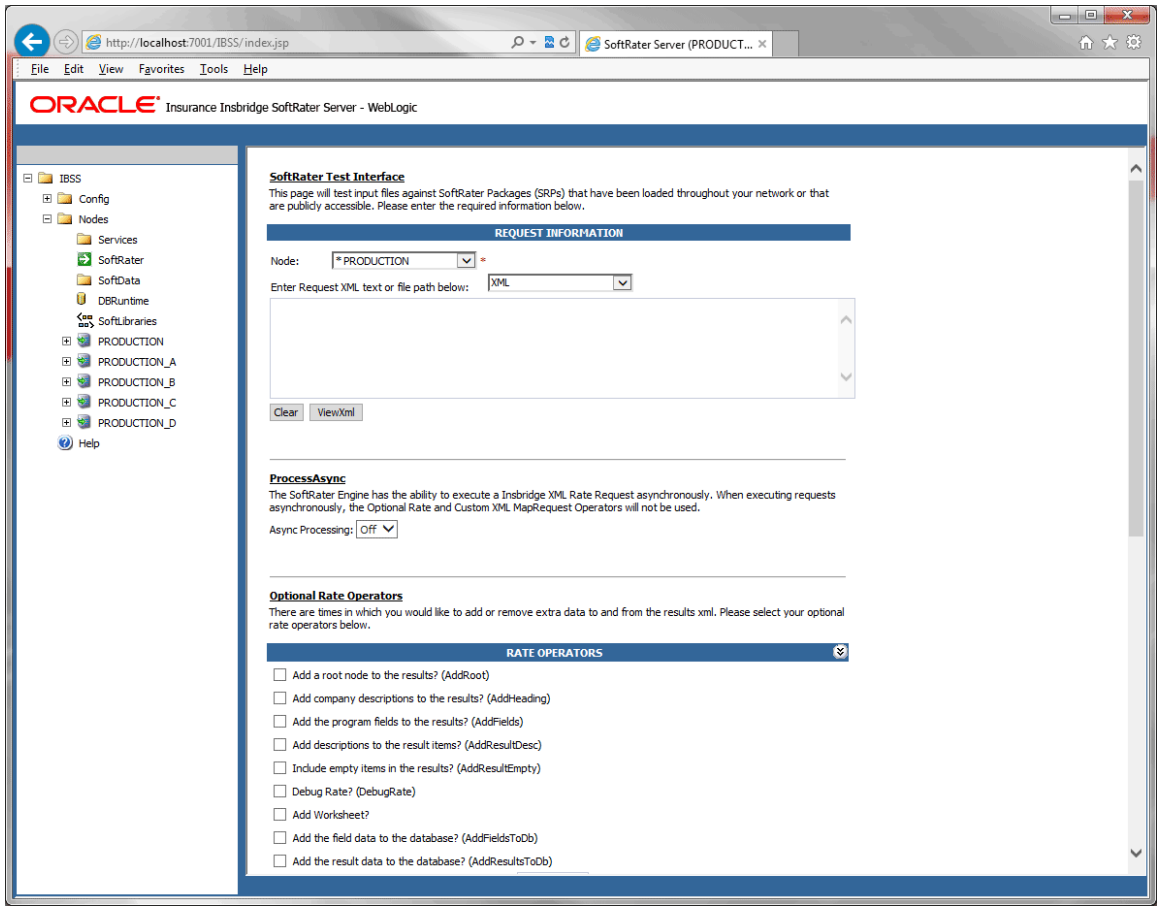


Figure 61 SoftRater Test Interface

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. Options are available in the section:

- **Request Information:** This area allows you to select the node to rate against, and enter the request type.

- **Rate Operators:** In this optional area, you can select to add data to a result XML or to remove data from the result XML.

- **Maprequest Operators:** This area is used when submitting custom XML.
- **Result Information:** This area displays the results that are returned from the engine.

Request Information

This area located at the top of the page, allows you to select the node to rate against, and enter the request type.

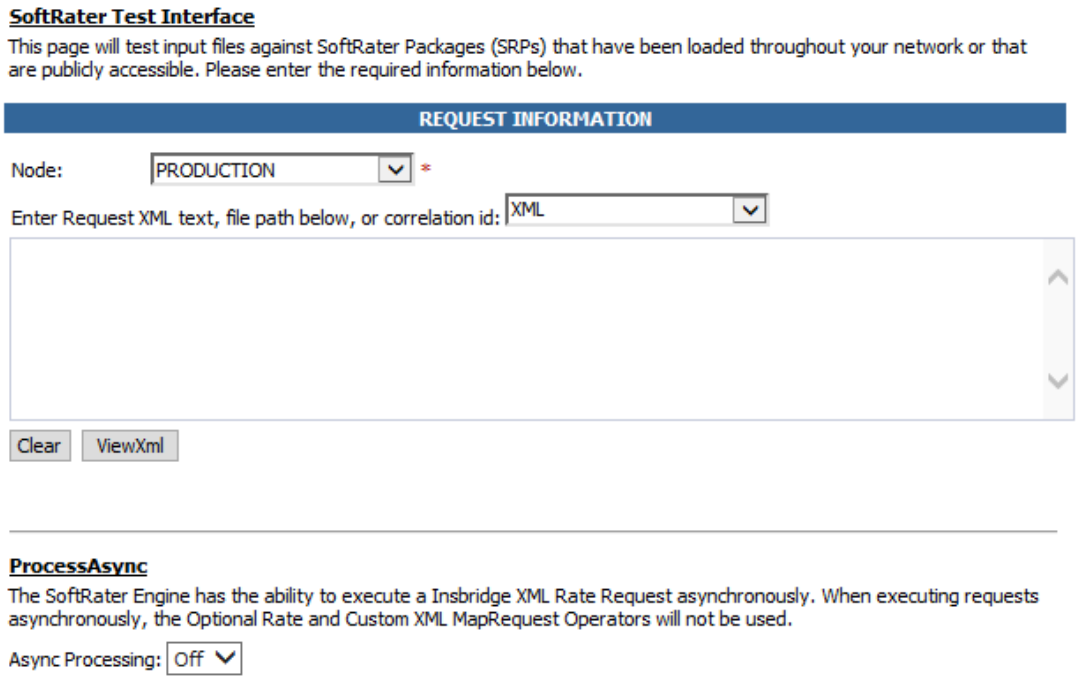


Figure 62 Request Information Area of SoftRater Test Interface

- **Node Select:** The nodes available are the nodes available to this instance of IBSS. An asterisk in front of the node name indicates the node you are currently on.
- **Request Type:** The format of the request you want to make.
  - **XML:** Copy and paste an XML file into the field.
  - **Path to XML:** Enter in the path to the XML file. This can be a network location.
  - **RecieveAsyncRequest – Correlation ID:** Enter in the correlation ID. If you process async, you can receive async. When you select this option, it is calling the ReceiveAsyncMessage. Enter the key in the text box and get the async request.
- **ProcessAsync:** 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.

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.

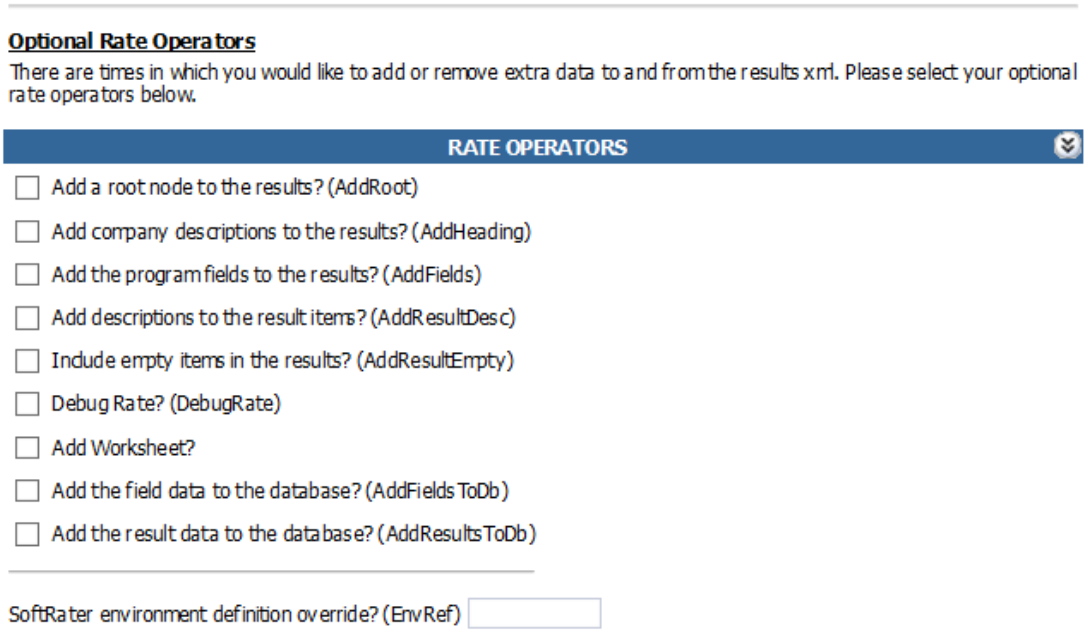


Figure 63 Optional Rate Operators

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 that you 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? (AddFields):** Add the program inputs 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 to add any worksheet associated with this program to 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.

- **Add the field data to the database? (AddFieldsToDb):** Add the fields data to the database. The result XML contains the batch ID.

  <db_rt_FIELD_BATCH_ID>

- **Add the result data to the database? (AddResultsToDb):** Add the result data to the database. The result XML contains the batch ID.

  <db_rt_RESULT_BATCH_ID>

- **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.

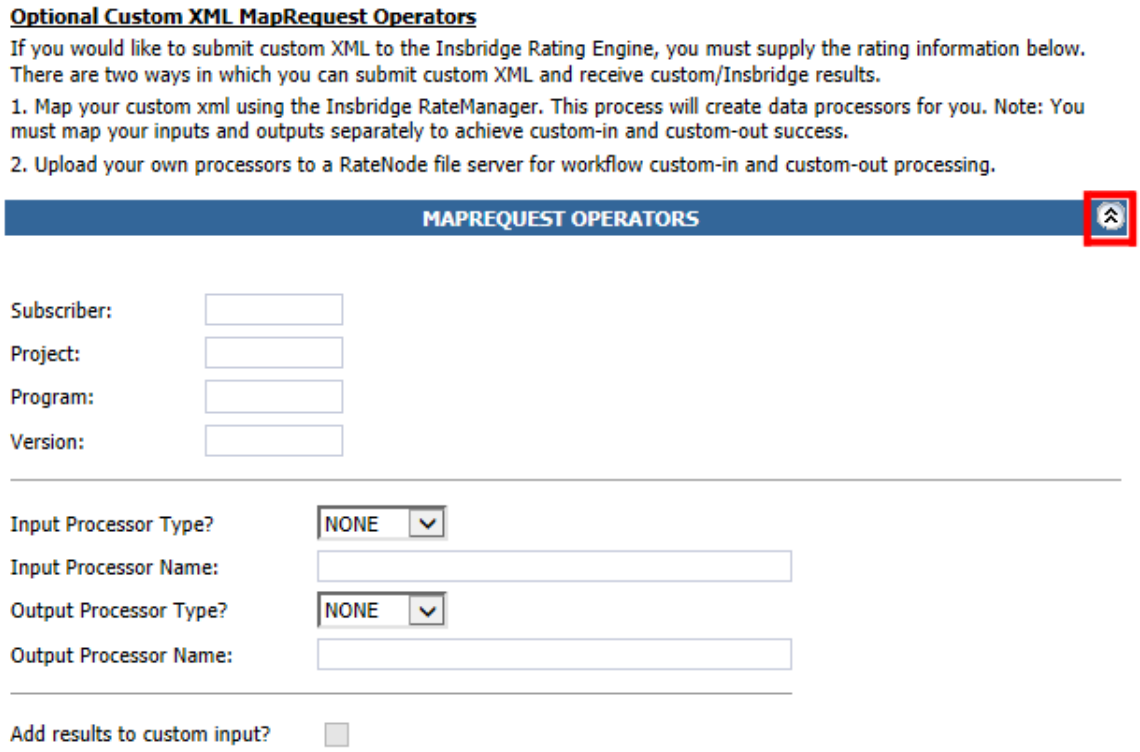


Figure 64 Custom XML Map Request Operators

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.

Result Information

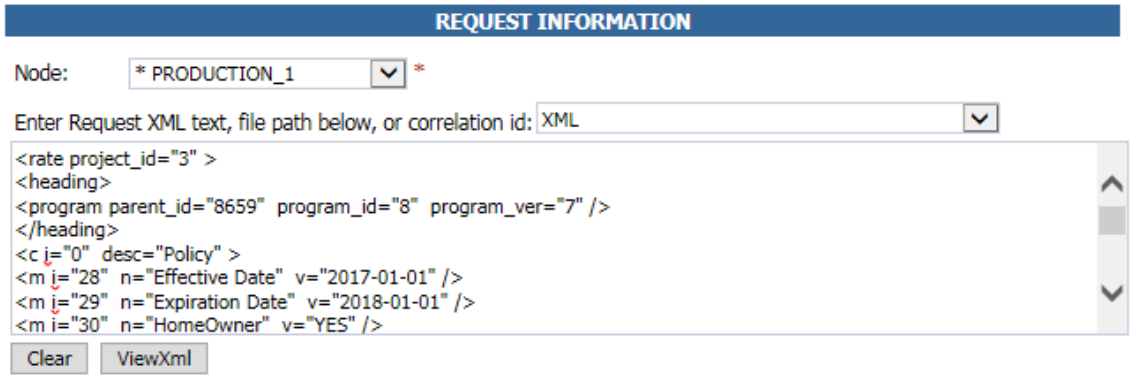
The area at the bottom of the page contains the results that are returned from the engine along with the last execution time.

Results can be viewed in XML.

Rating a File Using the SoftRater Test Interface

1. On the SoftRater Test Interface page, select the node that you want to rate against from the menu.

2. Select the request type and paste the XML file into the large text box or enter the path or correlation ID.



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.

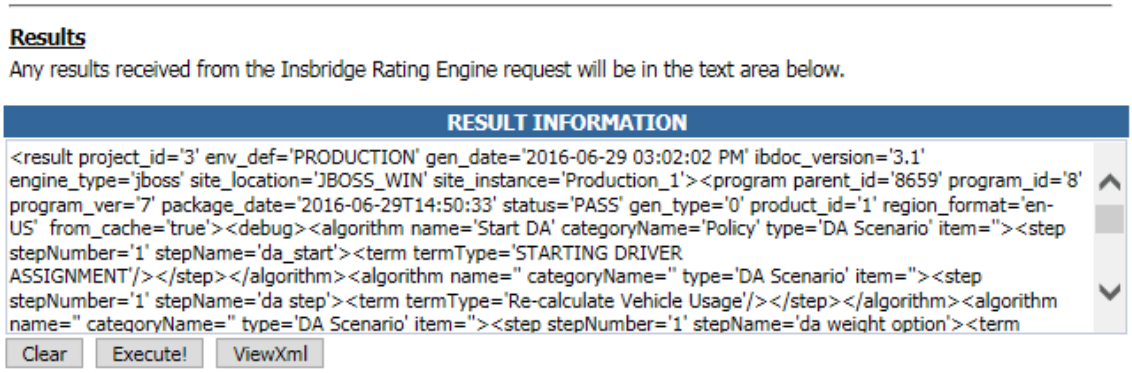


Figure 65 Test Results

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

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 node you want to rate against. The file can be copied from a source and pasted in the text box.

SoftData is located under the Nodes folder and is available to every node.

1. Select **SoftData** from the menu on the left. This opens the **SoftData Test Interface** page.

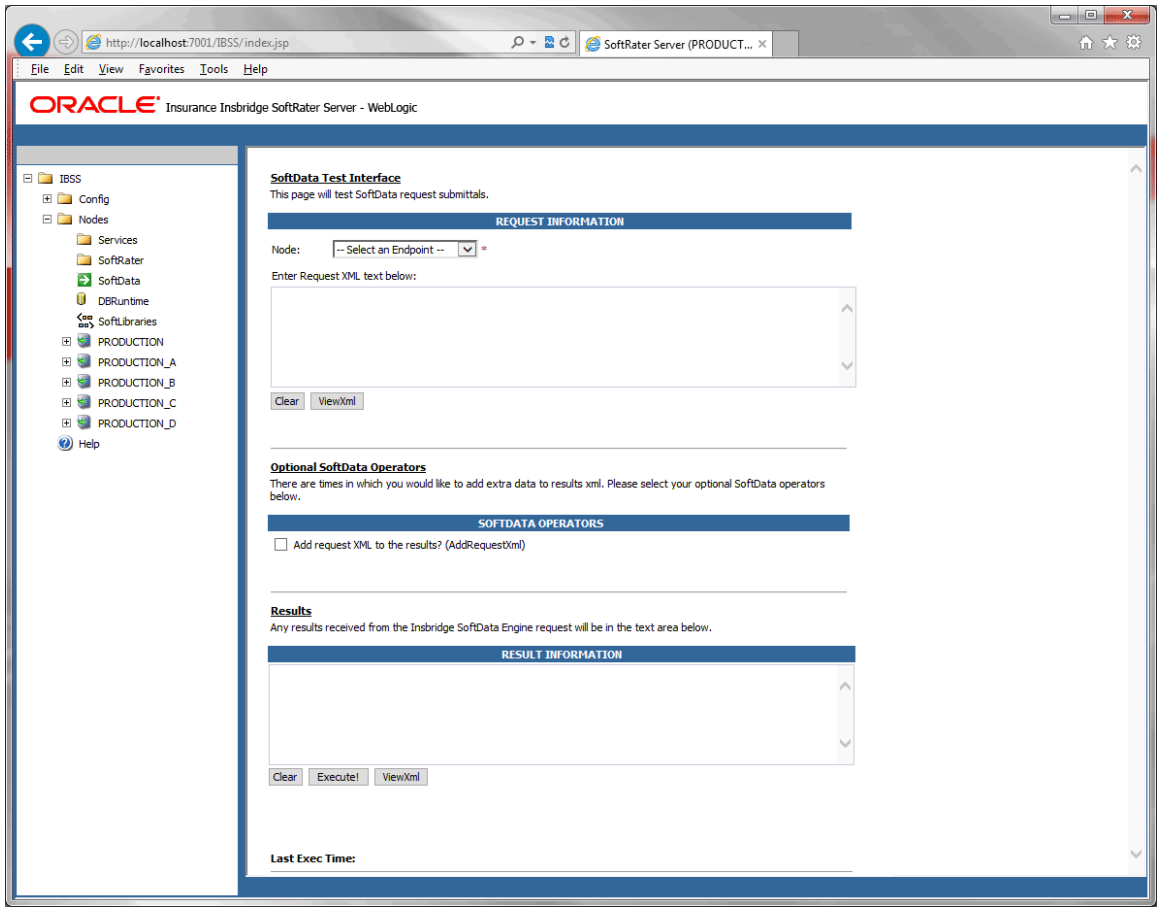


Figure 66 SoftData Test Interface

2. Select the node that you want to test against.
3. Enter in the Request XML.
4. Click **Execute**. The file is submitted and the results are shown in the results box.
5. To view the XML file in Internet Explorer, click **ViewXML**.

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

Chapter 8

DBRUNTIME

DBRuntime is the testing area for batch rating. Using nodes, you can create a batch, park it on disk, and send it to the node(s) for processing without having to interface with IBFA.

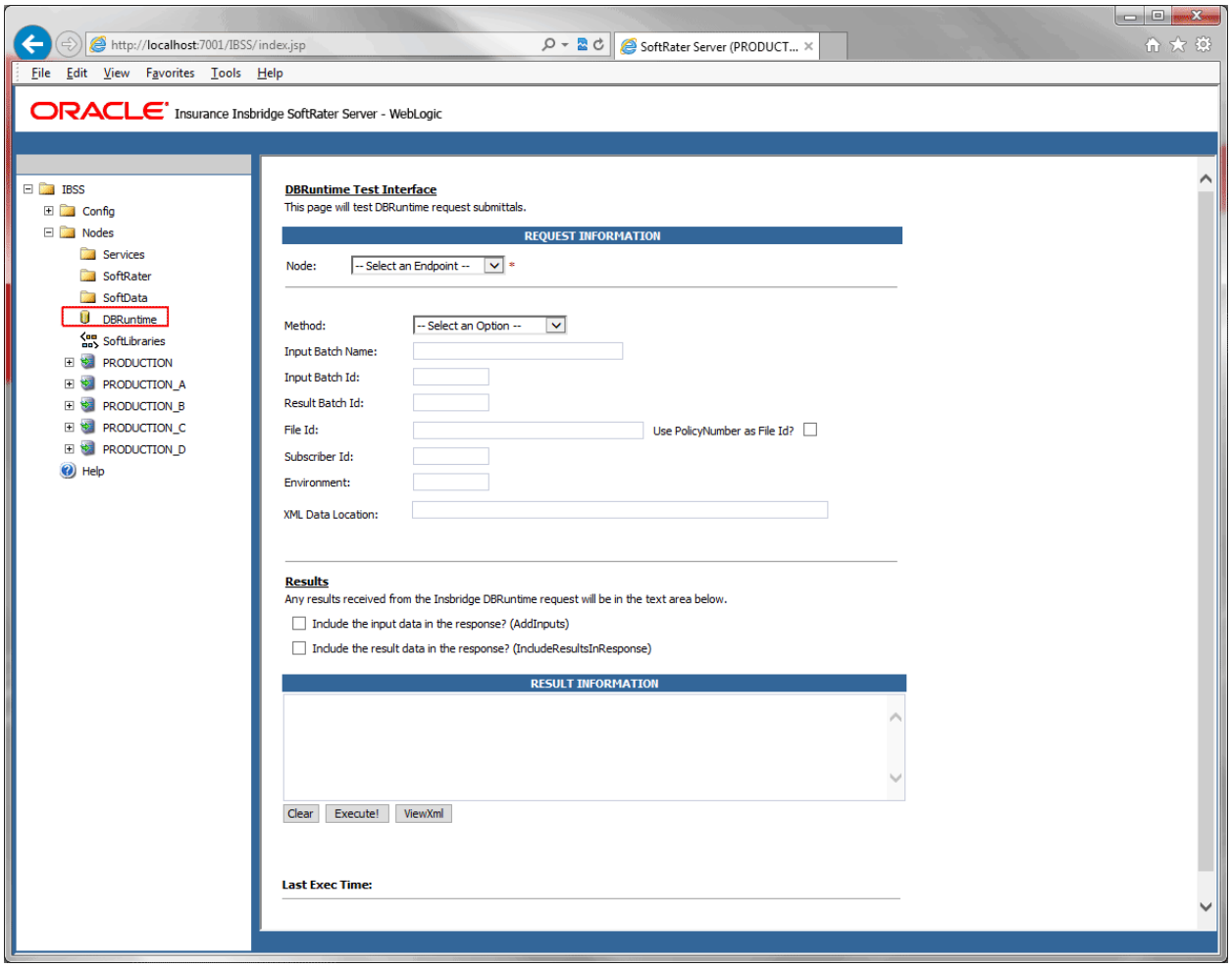


Figure 67 DBRuntime Test Interface

There are different ways to batch in IBSS:

- **Transactional Batch – Memory to Memory:** Sending multiple rates down at one time. For example, a single file with 20 rates can be sent all at once. When you are rating in memory, you can rate on a configurable option that you can set.
- **Async Rating:** When you send a batch, it rates, and you poll to see if it is complete. The async processing is the same. Web service to get you the results
- **SoftRater Node Rating – Disk to Disk:** A batch is sent to the node(s) that executes the batch. If more than one node is used, the requests are sent by a master to the next available machine. A

path is entered to the location of the file on disk. The files are rated, and then parked back on the disk or wherever you want to place them. Rating is done disk to disk using one or more nodes.

- **Clustering Database to hold and Cluster to Process:** All fields are loaded in a database and then a batch is submitted. Instead of one server distributing the load, the threads get the files. The files are in a pool and the nodes are used to process the request as they become open. The result files are then put in the database. This is a database to hold and the cluster processes method.

DBRuntine has a request information area and a result information area.

Request Information

The Request Information area holds the details of the request.

- **Node:** The endpoint you want to use. The nodes listed are the nodes available to this instance of IBSS.
- **Method:** The option you want to perform. The selected option determines the required fields.
  - **RateFromDb:** Rate a file from the database.
  - **GetInputXML:** Get the input XML.
  - **GetResultXML:** Get the result XML.
  - **AddInputXML:** Add the input XML.
  - **DeleteInputBatch:** Delete an input batch file.
  - **DeleteResultBatch:** Delete a result batch file.
  - **SendBatchResultsEmail:** Send a batch results email.
  - **AddResultXML:** Add the result XML.
- **Input Batch Name:** A user defined name for the input batch. Used when adding an input XML file.
- **Input Batch Id:** A user defined ID for the input batch. Used for rating from database and input methods types.
- **Result Batch Id:** A user defined ID for the result batch. Used for result methods types.
- **File Id:** A user defined file ID for the batch. Used for rating from database and get input XML, get result XML, and send batch results email methods types.
- **User PolicyNumber as File Id:** Check this option if you want to use the policy number as the file ID.
- **Subscriber Id:** The subscriber ID used. Required for every method type.
- **Environment:** The environment to be used. Environments are listed on the IBSS home page. Required for every method type.

- **XML Data Location:** The location of the XML. Used when adding input XML.

Result Information

The area at the bottom of the page contains the results that are returned from the engine along with the last execution time.

Results can be viewed in XML.

There are two options for results:

- **Include the input data in the response? (AddInputs):** Check this option to include the input data in the response.
- **Include the result data in the response? (IncludeResultsInResponse):** Checking this option allows for the result data to be included in the response

Running a Rate Using DBRuntime

1. Select **DBRuntime** from the menu on the left. This opens the **DBRuntime** page.
2. Select the node that you want to test against.
3. Enter a subscriber ID.
4. Enter the Environment
5. Enter in the location of the XML data. This can be local or a network share.
6. Check if you want any result options.
7. Click **Execute**. The file is submitted and the results are shown in the results box.
8. To view the XML file in Internet Explorer, click **ViewXML**.

NOTE: *The asterisk (*) indicates the node you are currently on.*

SOFTLIBRARIES

The SoftLibraries section of IBSS allows an administrator to add, edit or delete external libraries. SoftLibraries can be created by developers and can be setup as an application or a lookup and are available to all nodes. After being added to IBSS, SoftLibraries must be added and activated in IBFA. Only active SoftLibraries can be used by callout programs in RateManager. In SoftLibraries you can:

- **Add Libraries**
- **Edit Libraries**
- **Delete Libraries**

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

SoftLibraries can be found under Nodes -> SoftLibraries.

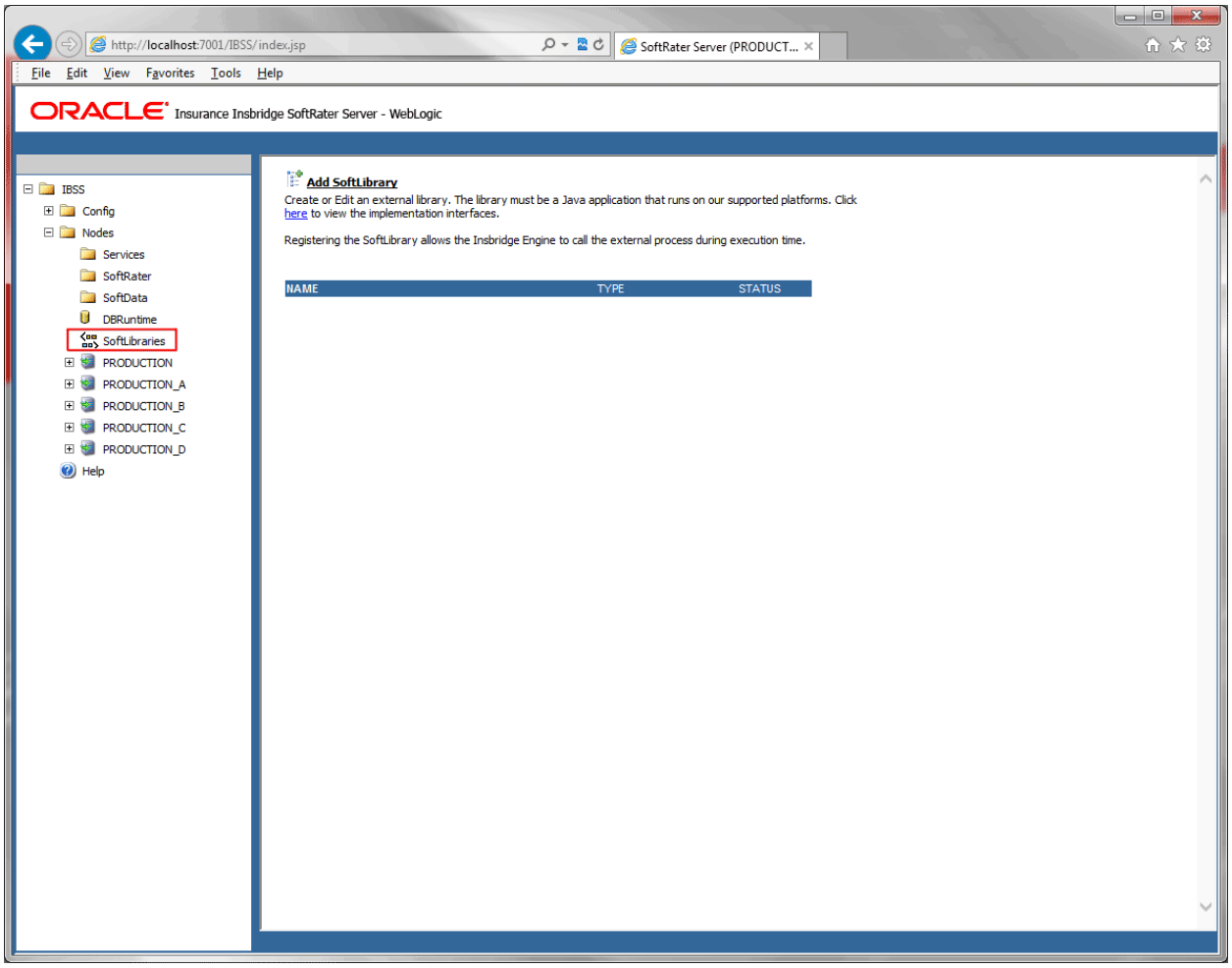


Figure 68 SoftLibraries Main Menu

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 available to IBFA. If a SoftLibrary is disabled, it will not be displayed in IBFA. 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.

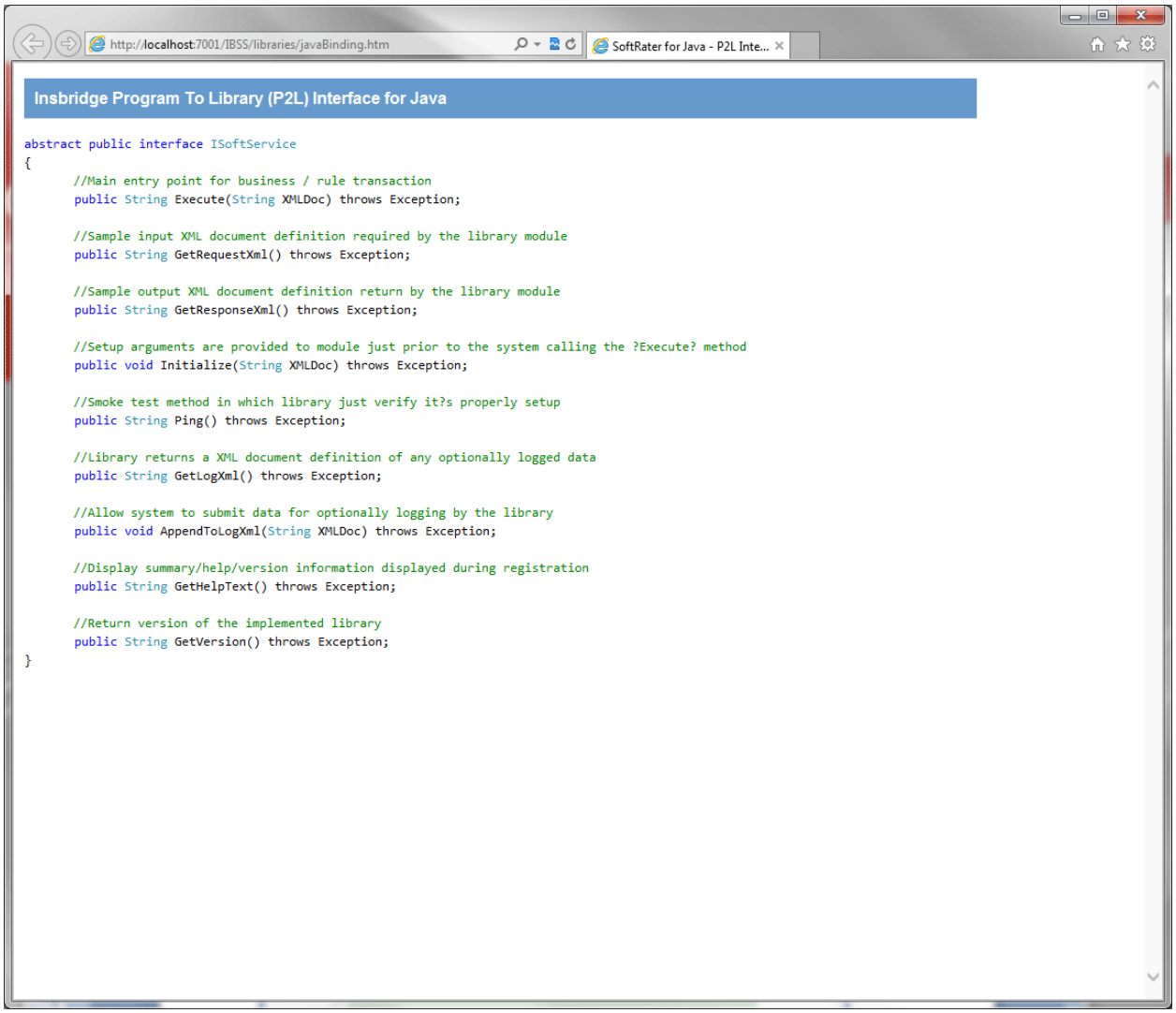


Figure 69 SoftLibrary Implementation Information

ADDING SOFTLIBRARIES

Adding a SoftLibrary is a multi-step process.

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

Step 1: Placement of Library on App Server

NOTE: *For the first part of adding a SoftLibrary, you must have access to the application server where IBSS is located.*

1. Have your Java class library ready as a .JAR file.
2. On the application server where IBSS is located, stop the app server.
3. Place the .JAR file in the lib location designated by application:

    a. **WebLogic:** Place the .JAR file in the /$WL_Home/user_projects/domains/YOUR_DOMAIN/lib.
    b. **WebSphere:** Place the .JAR file in the WebSphere install directory /$WS_Home/AppServer/lib.
    c. **JBoss:** Place the .JAR file in the JBoss install directory /$JB_Home/server/SR_Server/lib.

    Where$_Home is the relative path to the app server installation location.

4. Restart the app server.

NOTE: *To enter a library in IBSS, you must have the Class Name.*

Step 2: Entering Library in IBSS

1. On the SoftLibrary page, click the **Add SoftLibrary link** at the top of the window. A separate window is displayed.

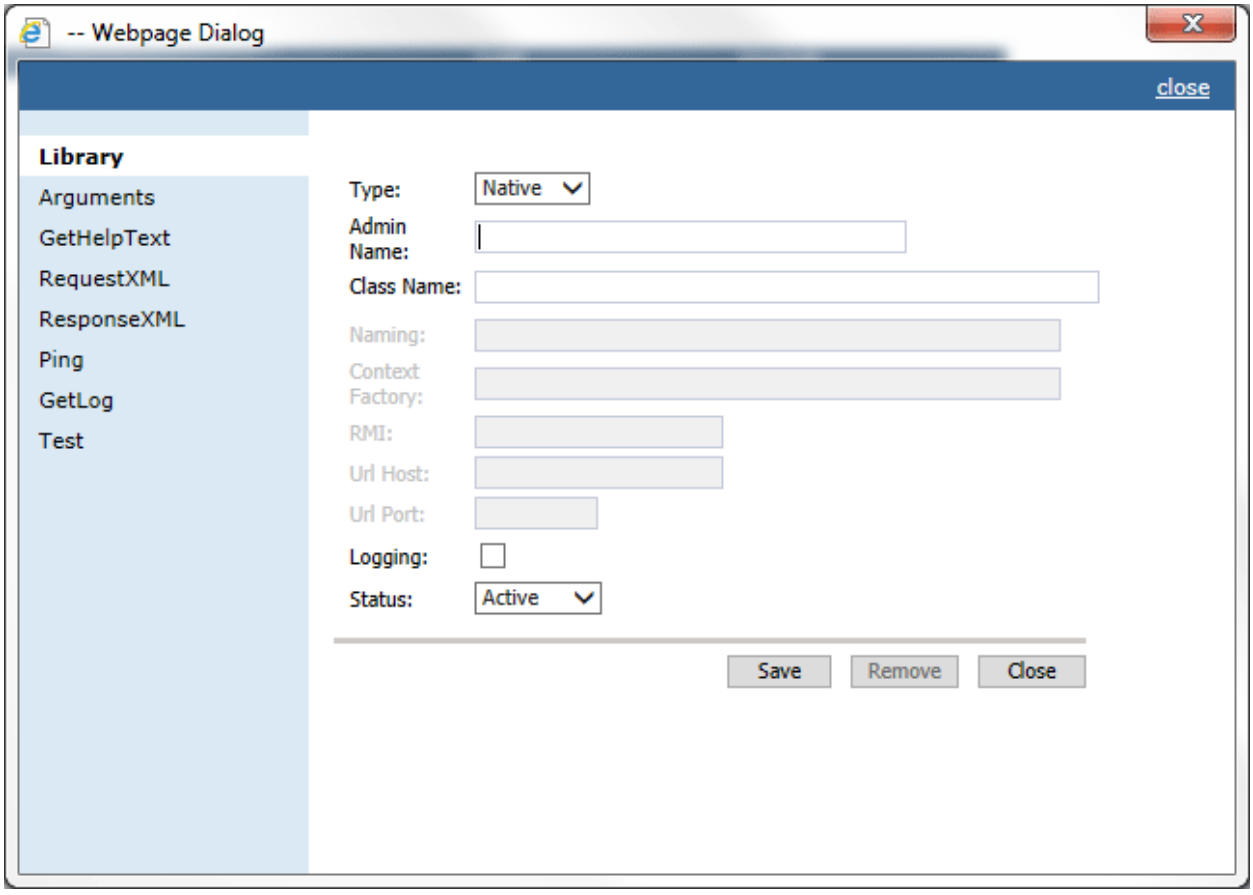


Figure 70 SoftLibraries Main Screen

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.

There are three buttons located in the Library Add/Edit section.

- **Save** – Saves your work.
- **Remove** – Removes the entire library.
- **Close** – Closes the window without saving.

2. The first window is the Library information window. Information must be entered here before you can continue.
   - Select the Type. There are two types of SoftLibraries in IBSS:
     - **Native** – The library is installed as an application on the app server.
     - **Lookup** – The library uses an EJB Lookup.

For Native Entries

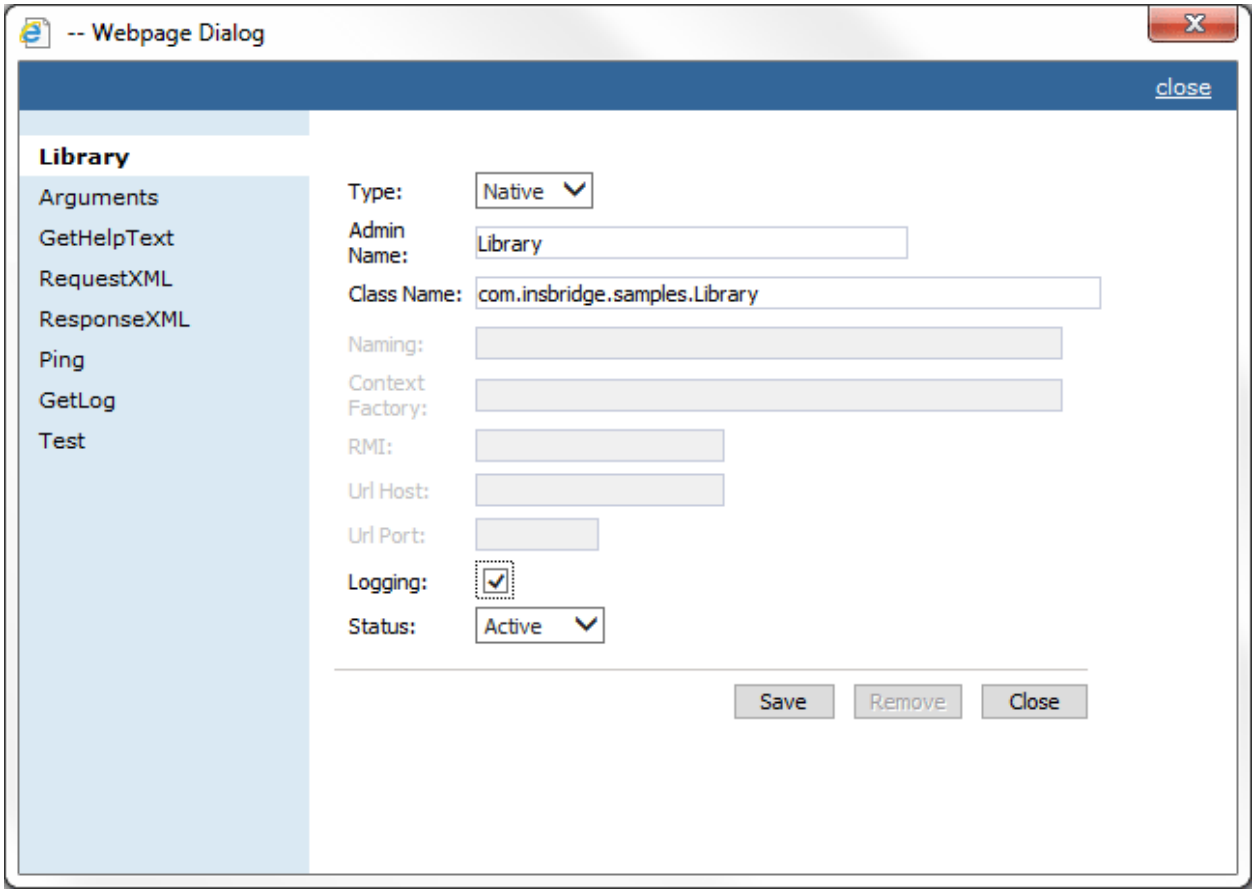


Figure 71 SoftLibrary Native Type

- **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 lower section of the SoftLibraries page. Admin names must be unique.
- **Class Name:** This is the name of the actual SoftLibrary created by the developer from the program where it was created. This information can be obtained from the developer. Class names must be unique.
- **Logging:** Check this box if you want logging for this program. Leave it blank for no logging. The default is for no 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 disabled.

For Lookup Entries

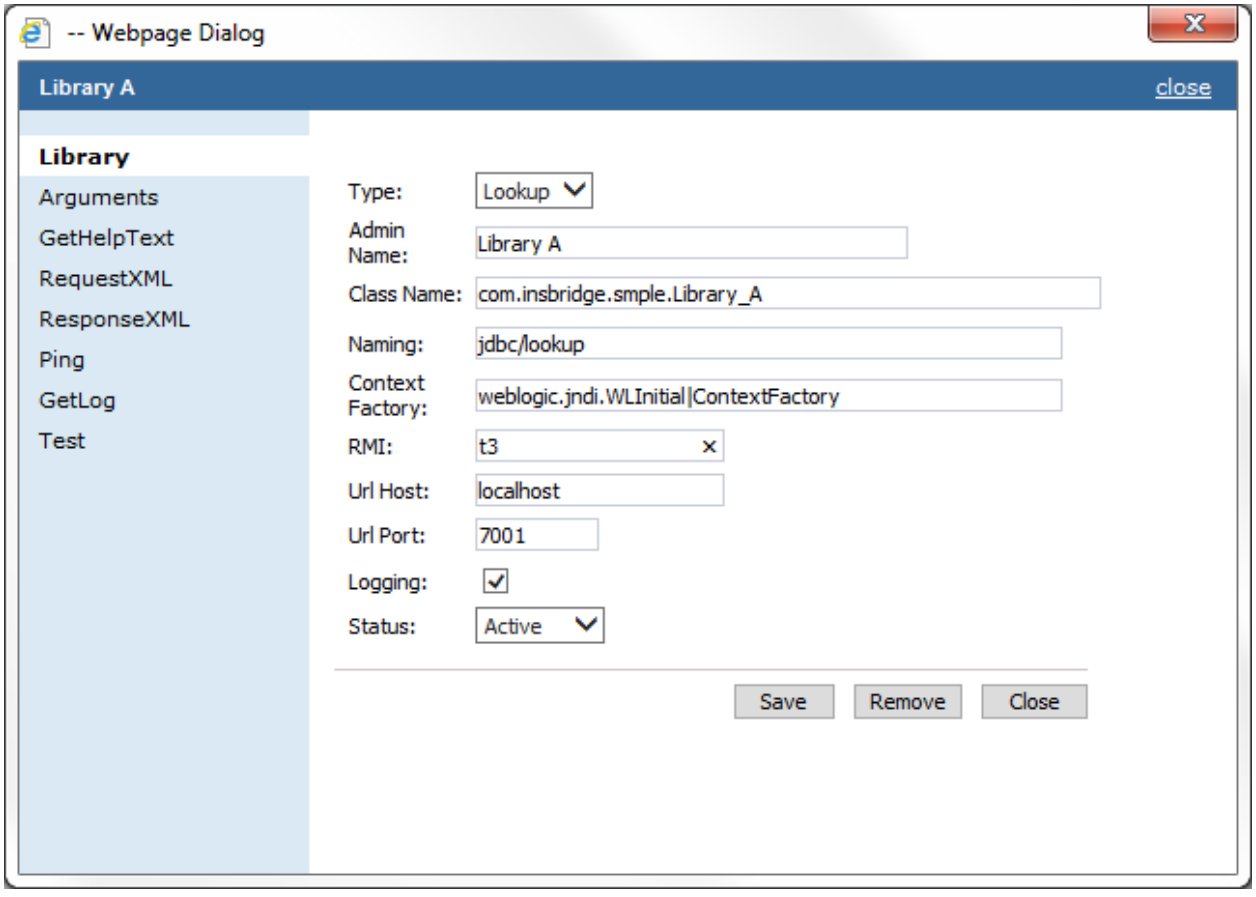


Figure 72 SoftLibrary Lookup Type

- **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 lower section of the SoftLibraries page. Admin names must be unique.

- **Class Name:** This is the name of the actual SoftLibrary created by the developer from the program where it was created. This information can be obtained from the developer. Class names must be unique.
- **Naming:** The name of the data source.
- **Context Factory:** A URL context factory is a special object factory that creates contexts for resolving URL strings.
- **RMI:** The Java Remote Method Invocation used.
- **URL Host:** The name or IP of the host server.
- **URL Port:** The port number used by the host server.
- **Logging:** Check this box if you want logging for this program. Leave it blank for no logging. The default is for no 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 disabled.

3. Click **Save** to add your SoftLibrary. It will be displayed on the lower portion of the screen.

If there are any errors with the new SoftLibrary, a message will be displayed at the top of the screen explaining the conflict.

Step 3: Entering in IBFA

SoftLibraries entered in IBSS are not displayed in RateManager until added and activated in IBFA. You will need to have the Admin Name, Class Name, and Endpoint in order to add the SoftLibrary in IBFA. Please see the IBFA User Guide for more information.

Arguments

After a library is created, arguments can be entered. Arguments are settings that the library should use.

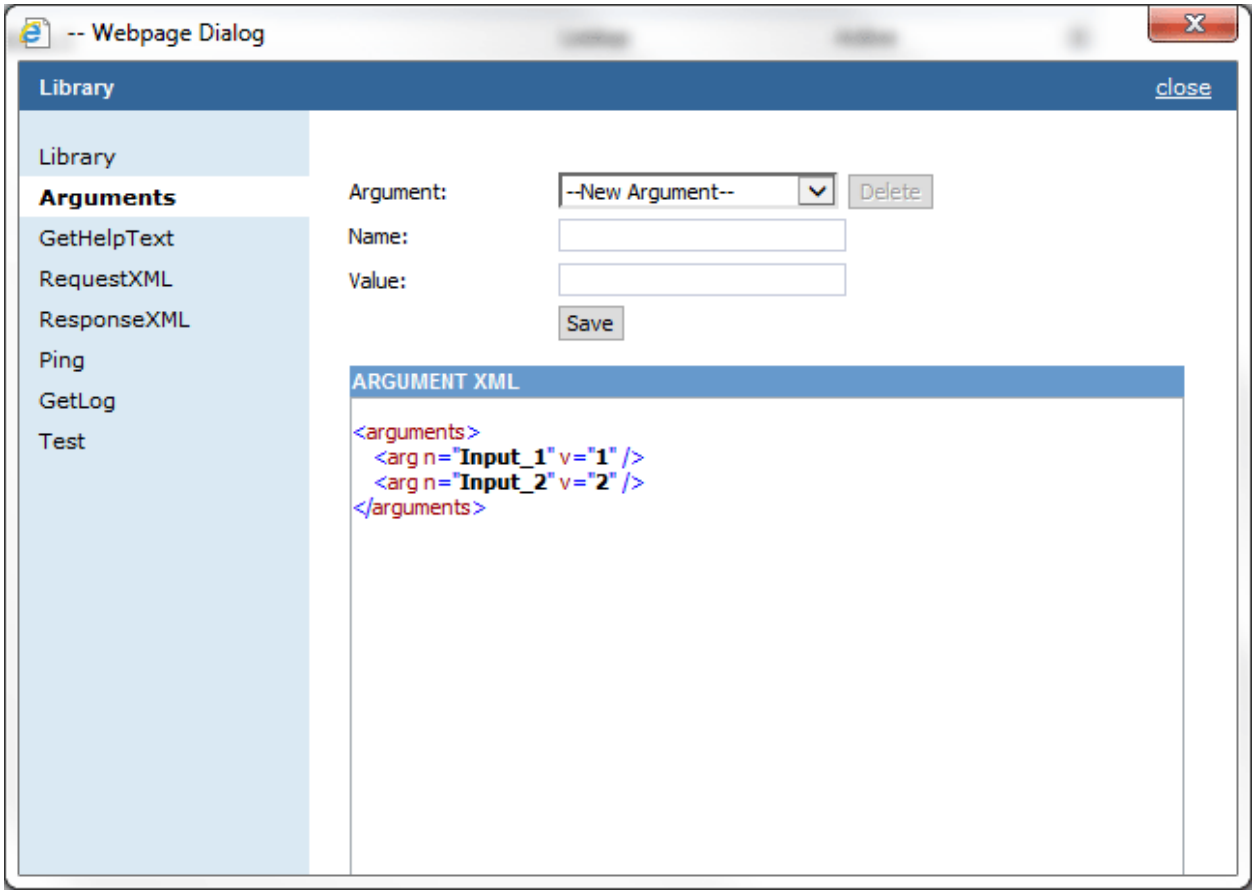


Figure 73 Editing Arguments

Adding an Argument

To create an argument, select **--New Argument--** in the Argument drop down list. Enter in a **Name** and a **Value**. Click **Save**. Your argument will be listed below.

To add an argument, select the **Argument** you want 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.

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.

GetHelpText

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

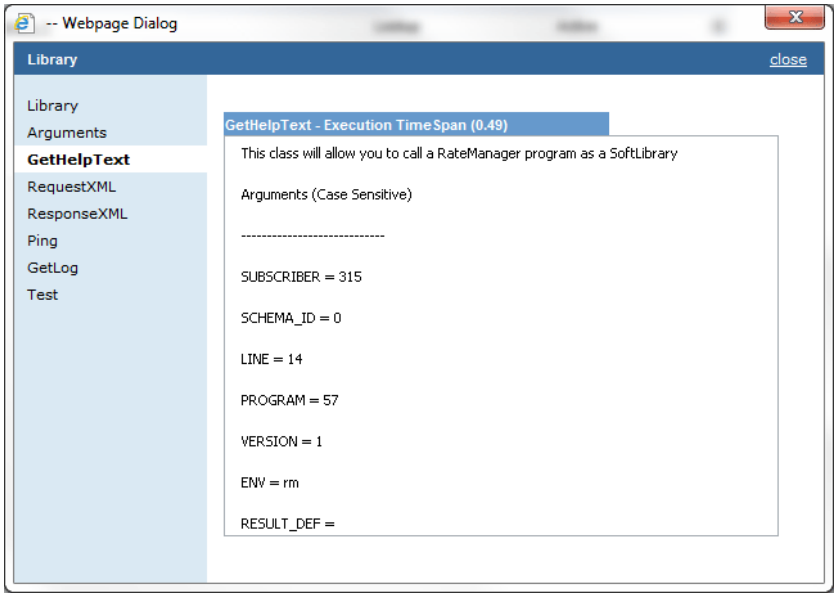


Figure 74 GetHelpText Window

RequestXML

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

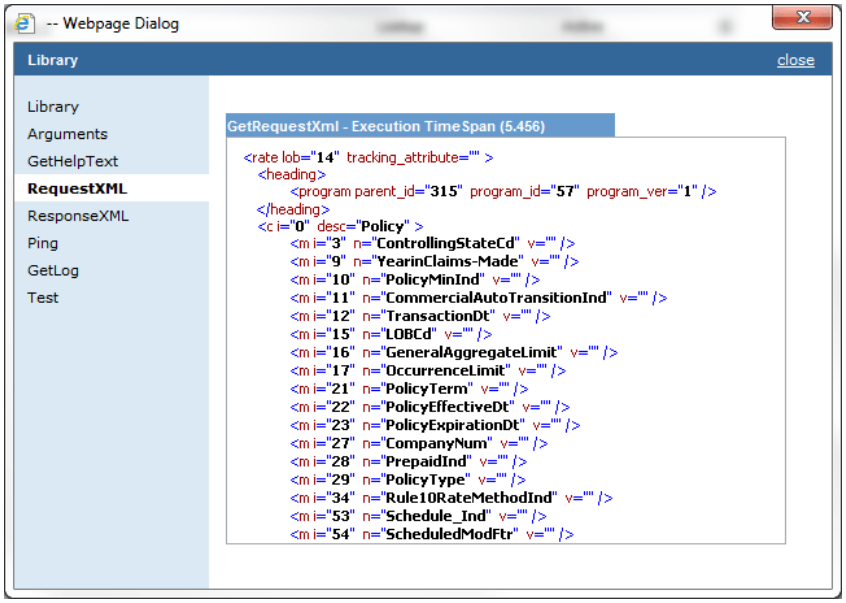


Figure 75 RequestXML Window

ResponseXML

The **ResponseXML** window tells you exactly what you are getting back.

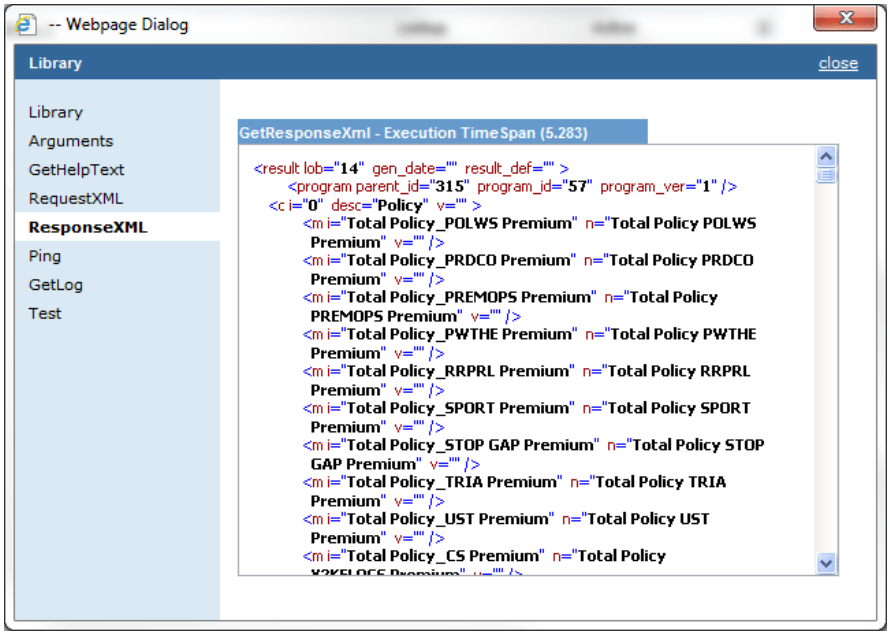


Figure 76 ResponseXML Window

Ping

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

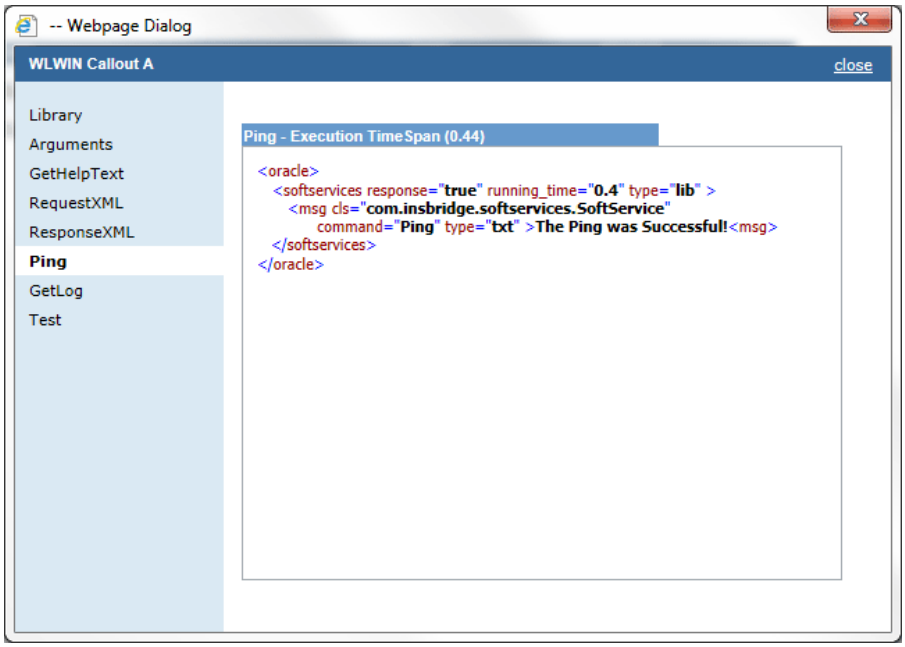


Figure 77 Ping Window

GetLog

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

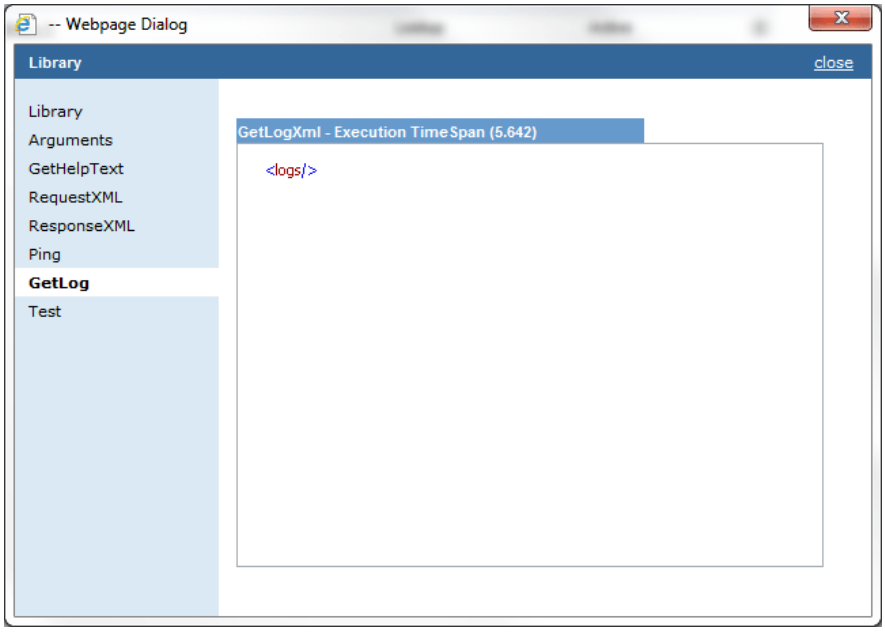


Figure 78 GetLog Window

Test

The last menu option is Test. Test has three parts

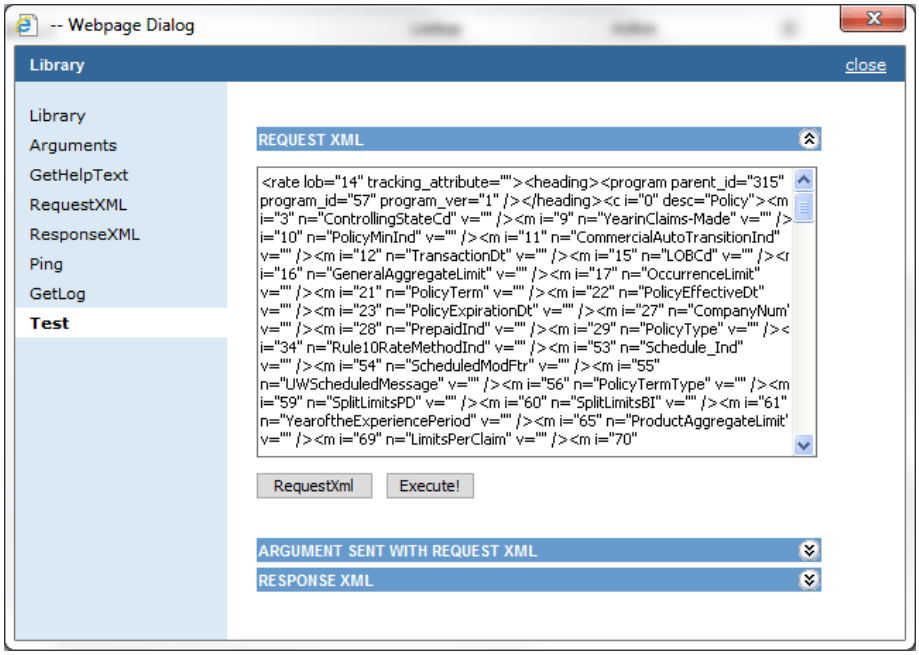


Figure 79 Test Window – Request

- 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.
- You can view the arguments sent with the request XML.
- Click the Execute! button to execute the XML. The responseXml will be displayed. To view the Arguments sent or to view the RequestXML, click the expand button .

After a SoftLibrary has been entered, it is listed on the main SoftLibrary page. You can view quick details by expanding the arrow on at the end of the field.

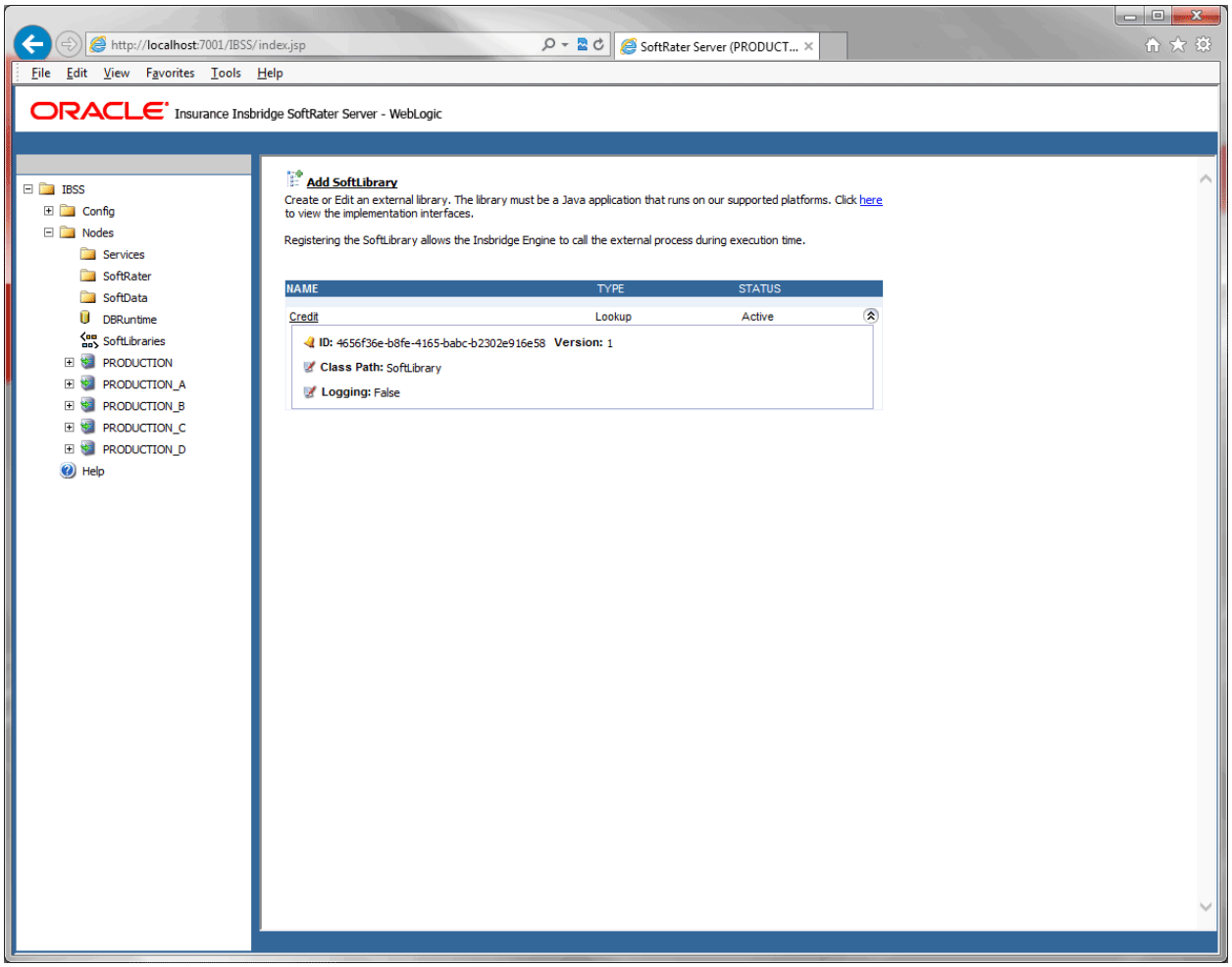


Figure 80 Completed SoftLibrary

EDITING SOFTLIBRARIES

Any SoftLibrary can be edited at any time. Changes to a SoftLibrary in IBSS may not be automatically carried over to IBFA. If you edit the Admin Name or Class Name, you will have to edit the same information in IBFA. You also could delete the SoftLibrary in IBFA and then re-add it. 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 SoftLibrary here will affect any programs in RateManager that currently call this SoftLibrary without sending notice to users. SoftLibraries will also have to be deleted out of IBFA.

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.

Sample for Sending a Message to Call a SoftLibrary

This sample can be used when you have a third party application that needs to communicate with an IBSS SoftLibrary. This is the message that gets sent to the SoftLibrary services.

Sample Message:

```
<oracle>
<softservices type='lib'>
        <msg command='Execute' name='MyServiceName'>
                <my_xml_root>
                        <My_Message> Abc-123</My_Message>
                </my_xml_root>
        </msg>
</softservices>
</oracle>
```

Where:

Command	Definition
type='lib'	Standard argument for requesting (SS) libraries. This is a required entry.
command='*xxx*'	Where *xxx* equals the option to be performed. Options include: 'Execute' GetRequestXml' 'GetResponseXml' 'Ping' 'GetLogXML' 'AppendToLogXml' 'GetHelpText' GetArgs' **NOTE:** Values are **NOT** case sensitive. This is a required entry.
name='*xxx*'	Where *xxx* equals the admin name of the (SS) from the IBSS (SS) admin console. **NOTE:** Values **ARE** case sensitive. This is a required entry.
Abc-123	Where *Abc-123* equals your XML.

Chapter 10

NODE MANAGEMENT

Nodes are serviced and managed at the node level.

NODE INFORMATION PAGE

Nodes are listed in the Nodes section on the IBSS home page and on the left side of the screen under the nodes folder.

The nodes folder holds the shared functionality available to all nodes and the details and functionality available to each individual node. To view the details of an individual node, expand the Nodes folder and select the node where you want to view or edit details.

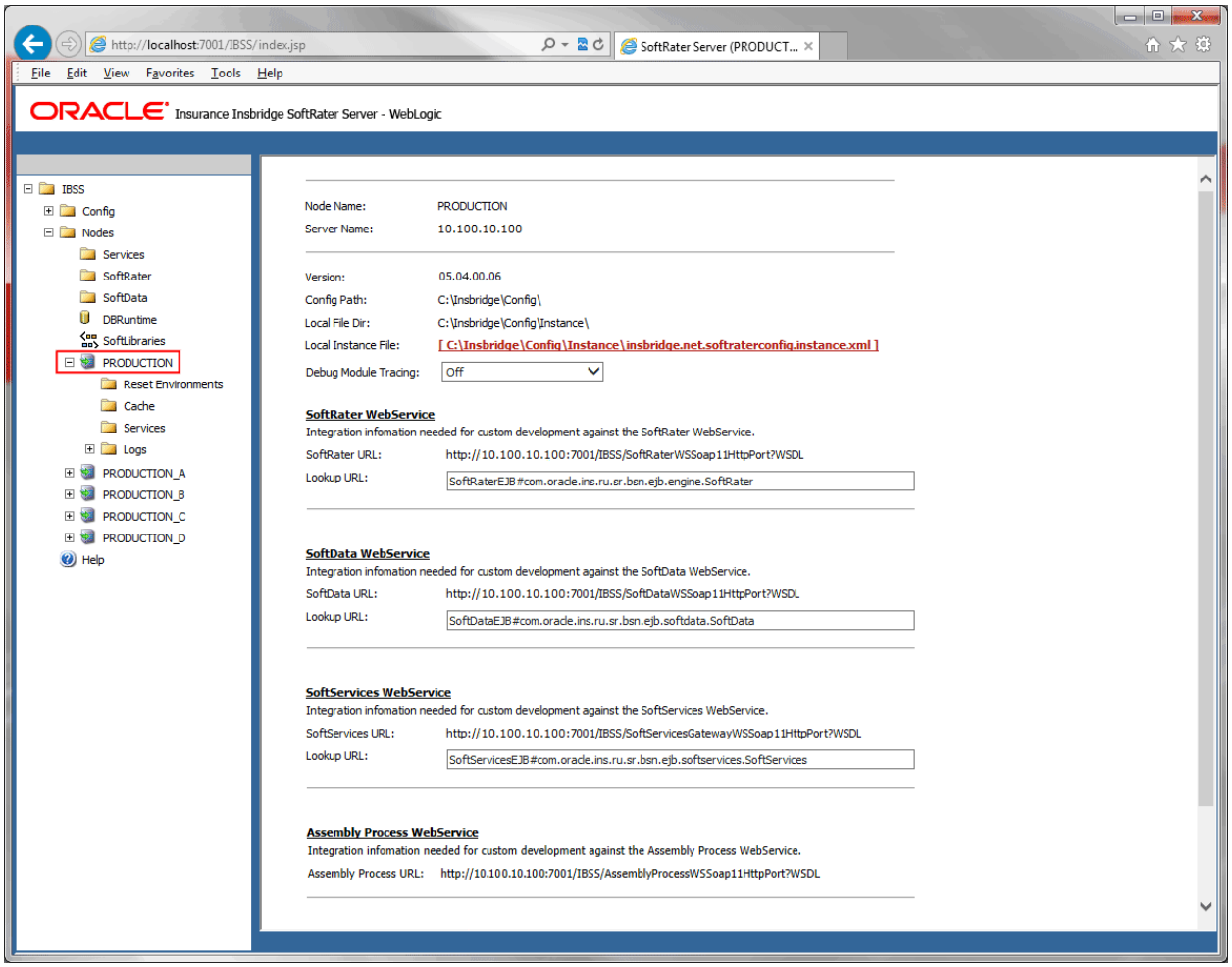


Figure 81 Node Management Window

To view the properties of the node, click the node name. The Node Information page is displayed. A few fields can be edited on this page. Most fields must be edited in other areas or cannot be edited.

- **Node Name** – The friendly name of the node. This is the name entered when the node was created. This can be edited on the IBSS home page by editing the node.
- **Server Name** – The server name or IP address where the node is located. This is a non-editable field.
- **Version** – The current IBSS version. Support may need this information if you have to contact them. This is a non-editable field.
- **Config Path** – The path to the shared config.xml file. This is a non-editable field.
- **Local File Dir** – The location of the Instance folder. The instance folder holds the error and audit logs for the node. This directory should be unique per node. This is a non-editable field.
- **SoftRater WebService** – The integration information needed for custom development against the SoftRater WebService. The Lookup URL can be modified.
- **SoftData WebService** – The integration information needed for custom development against the SoftData WebService. The Lookup URL can be modified.
- **SoftServices WebService** – The integration information needed for custom development against the SoftServices WebService. The Lookup URL can be modified.
- **Assembly Process WebServices** – The integration information needed for custom development against the Assembly WebService. This is a non-editable field.
- **Insbridge Task Service** – Timer EJB – An internal IBSS integration setting for the Insbridge Task Service. The Lookup URL can be modified.

Editing Lookup URLs

To update Lookup URLS, enter in the new URL and click Save at the bottom of the window. Your entry is saved immediately. You must save your entry. If you leave the page without saving, the URL is not updated. No warning message is displayed if you make changes and leave the page.

Debug Module Tracing

Debug Module Tracing can be enabled by from the Node Management screen. Enabling tracing provides additional information about the Module where tracing was enabled in the logs. The addition logs are also logged along with the usual application logs. Logs can be found in the Error Logs section under Logs.

IBSS > Nodes > <*Node_Name*>

where

<*Node_Name*> is the node that executed the request.

In the <Node_Name> screen, there is a dropdown for Debug Module Tracing. The Modules that can be traced using this option are:

- Off
- All
- Assembly Manager
- SoftRater Batch ExecQueue
- JMS
- SoftRater Batch
- SoftRater Web Services
- SoftData Web Services
- Task Manager
- WorkManager
- Remote Call
- SoftRater Cache
- SoftRater Locator
- Connector Service
- IBSS UI
- Impact Analysis
- SoftRater P2P Memory
- Rate to DB Result Debug

To perform a debug trace, select the option you want to trace using the drop down menu.

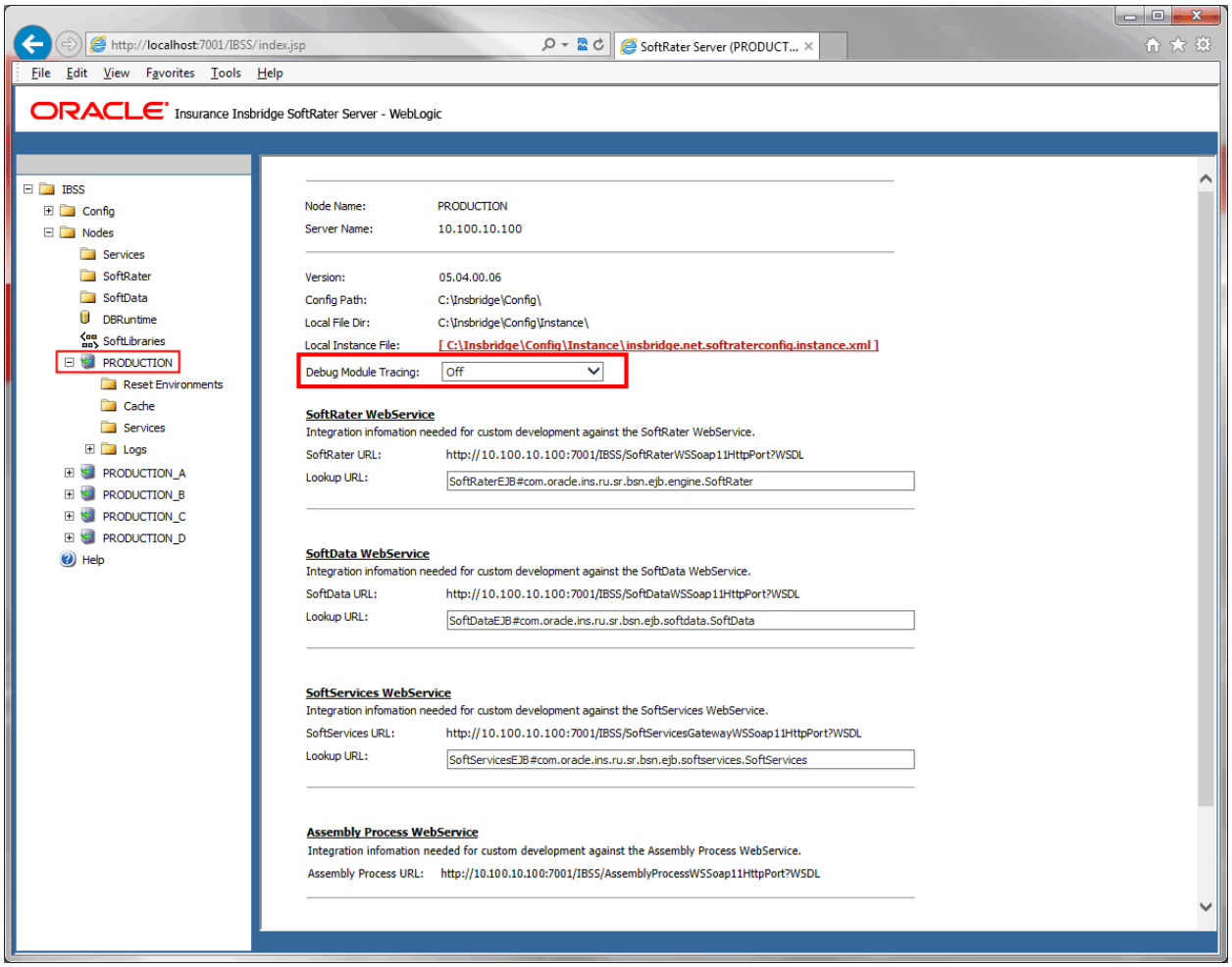


Figure 82 Debug Module Tracing

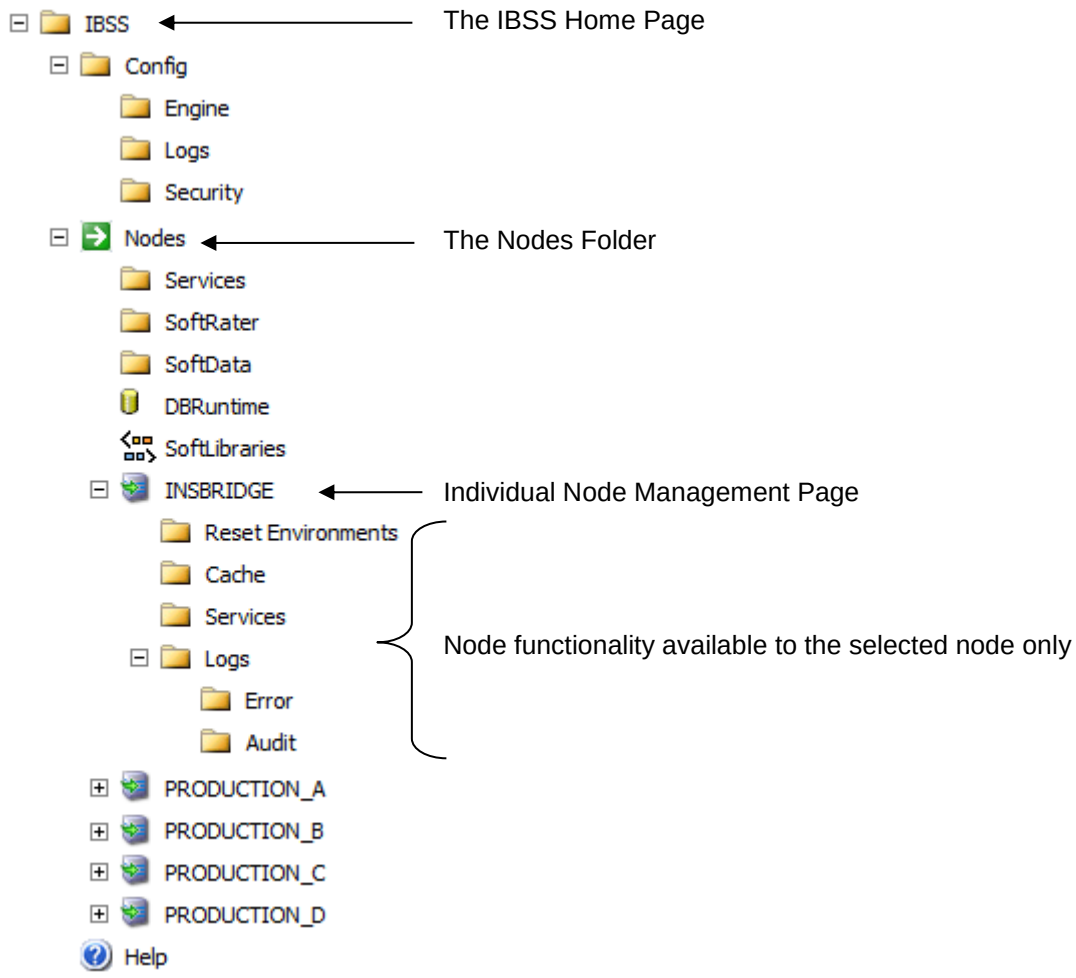
Each module logs particular details, and the Debug tracing can be enabled only to those modules. The details about the modules being tracked by each tracing option are:

Off	No tracing is done. This is the default option.
All	This option enables tracing across all modules. Selecting this option logs all details about the process. This may make debugging a specific module difficult due to the level of information returned. Make sure this is the option you want.
Assembly Process	All the database related operations and the Assembly process operations like starting a batch request, submitting a pending request, and other request operations are logged under this module. This can be used to trace errors with inputs to the engine.
SoftRater Batch ExecQueue	All the operations related to the batch execution queue are logged in this module.
JMS	The Queue related operations like inserting a message into queue, peek a message from queue are logged under the JMS Module.
SoftRater Batch	All the Batch operations before submitting the request to the engine are logged under this module.
SoftRater Web Services	This module logs all the web service related operations.
SoftData Web Services	This module logs all the web service related operations.
Task Manager	All the Timer related operations like scheduling a task, cancel a task and other details regarding the Task Listing are logged under this module.
WorkManager	Information regarding the job that is being executed, the Connector Service information, and how many threads are processing a request and the node that active are logged under this module.
Remote Call	The remote operations, such as engine execution, and the remote proxy client operations, are logged under this module.
SoftRater Cache	The operations related to the Program Listing and other cache operations are logged using this module.
SoftRater Locator	The EJB home locator details are logged using this module.
Connector Service	Connector Service operations, such as starting a service, are logged under this module.
IBSS UI	UI operations, such as Email configuration details, are logged under this module.
Impact Analysis	The operations related to Impact Analysis are logged using this module.
SoftRater P2P Memory	Logs SoftRater P2P memory operations.
Rate to DB Result Debug	Logs Rating to database result debug operations.

NOTE: *In IBSS, Error and Information logs are both located on the Error Logs page. Error Logs can be viewed under IBSS > Nodes > <Node_Name> > Logs > Error*

NODE FUNCTIONALITY

Under the Nodes folder, there is shared functionality that is available to all nodes. Under each individual node is functionality that is available only to the selected node.



The functionality available to individual nodes only is:

- **Reset Environment** – Resets the environment for the selected node only. Other nodes will continue using the config.xml that is in cache.
- **Cache** – Displays the current program listing in cache. On this page you can refresh cache to get the latest program listing or clear cache for the selected node.
- **Services** – Contains the management, properties, and messages for the Insbridge Connector Service, Message Process and the Insbridge Task Manager

- **Logs** – Displays the error and audit logs for the selected node. On this page you can view all general, batch, or impact analysis error logs or XML, SQL, or SoftRater Runtime Export audit logs.

These actions can only be performed under the node where you want to action to take place.

Reset Environments

To reset an environment for a specific node, select the **Reset Environments** link under the node that you want to reset. The Reset Environment Configuration:<*NODE*> window is displayed. The node that is going to be reset is displayed.

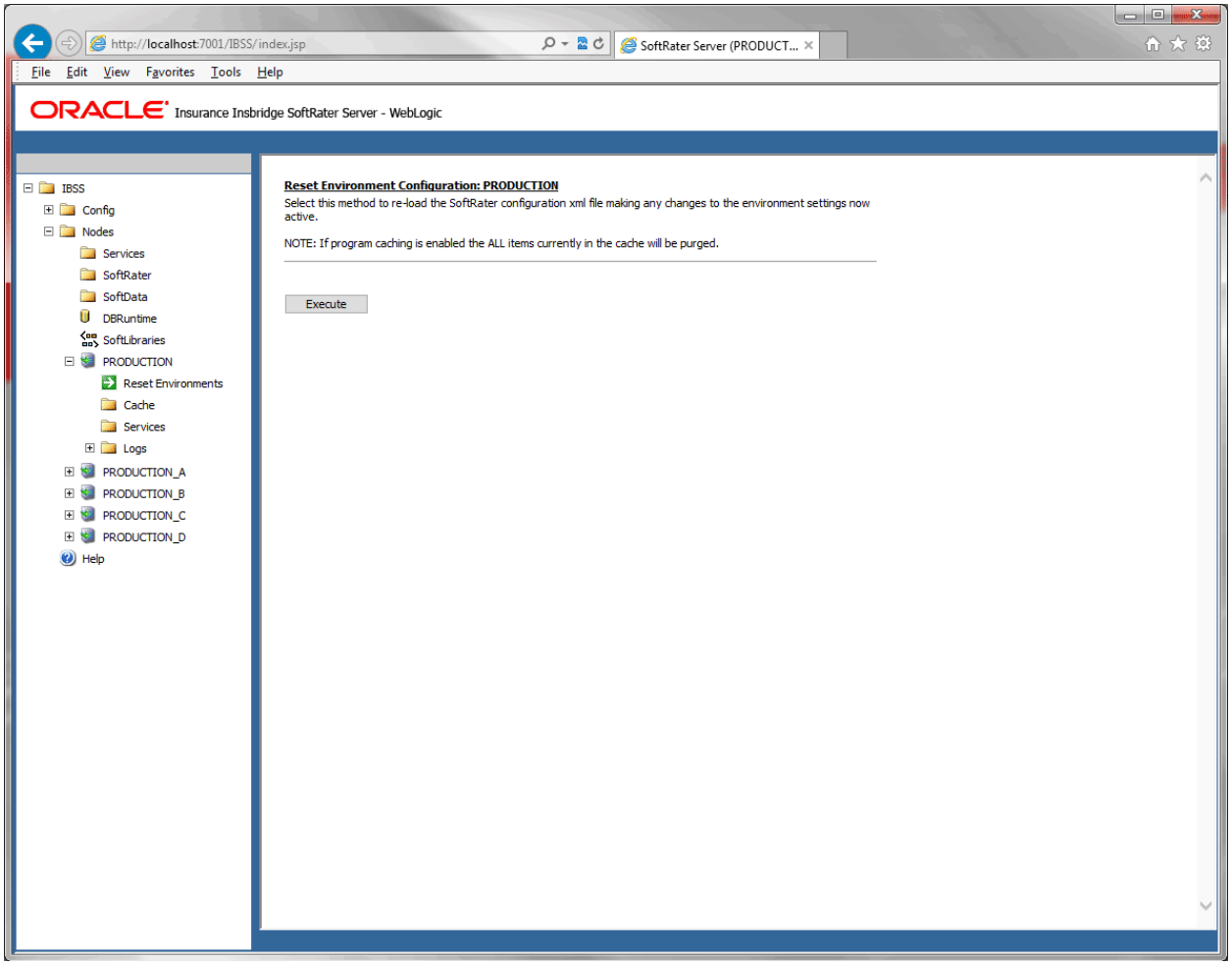


Figure 83 Resetting a Node

1. Click the Execute button. A confirmation window is displayed.

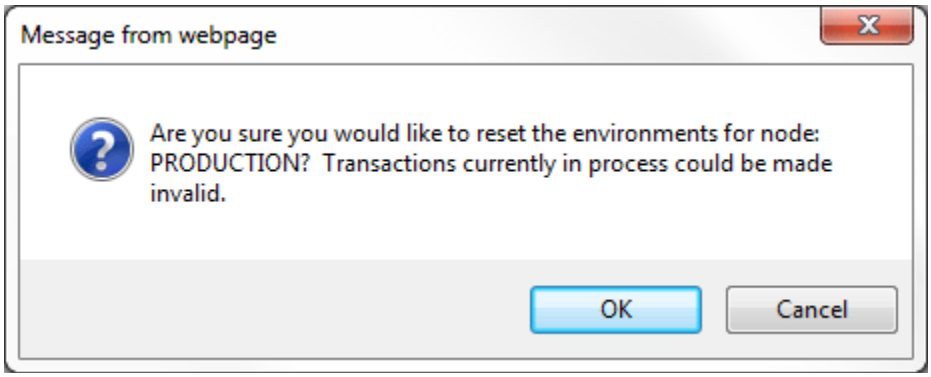


Figure 84 Confirming a Node Reset

2. Click OK to reset the environment. Click Cancel to return to the previous screen. No action will be taken.

3. The screen refreshes and the environment has been reset.

4. A confirmation window is displayed with a success or fail message.

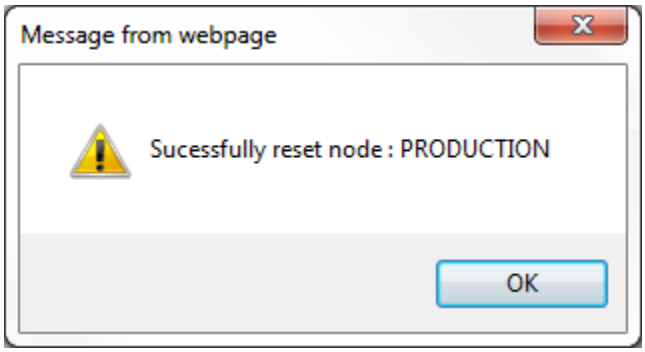


Figure 85 Successful Reset

An individual environment may need to be reset to activate changes to an environment. Changes do not take effect until the SoftRater configuration XML file is reloaded. This is the purpose of an environment reset.

NOTE: *Resetting environments causes all information in the cache to be purged and any transactions currently processing could be made invalid.*

CACHE

Cache is available to the individual node. Select the Cache link under the node where you want to view or clear cache. The Program Cache Options window is displayed. This page allows you to view a listing of all the programs currently in the cache and remove a specific program from the cache or clear the entire cache. If there is no cache, check to see if cache has been enabled on the Config->Engine page.

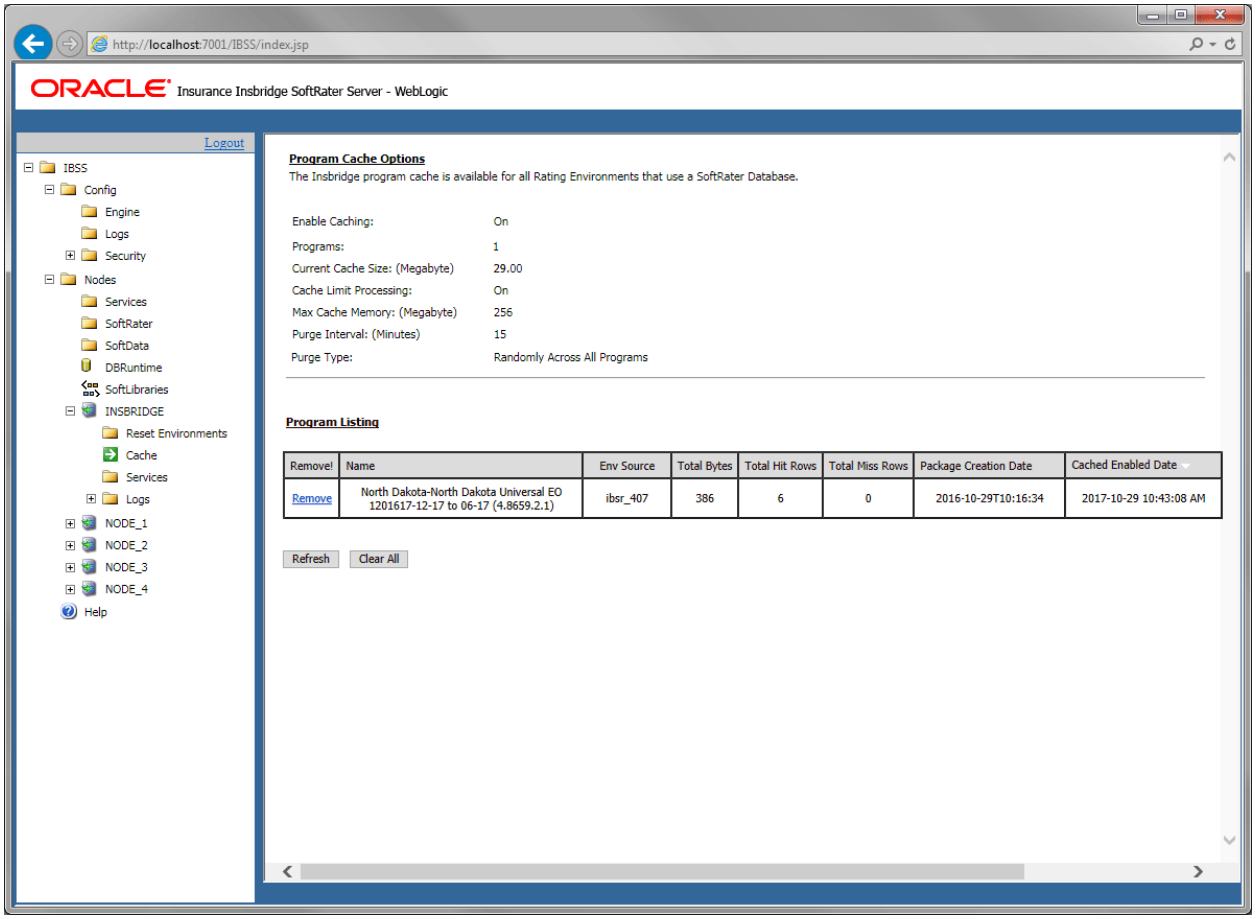


Figure 86 Program Cache

The Information in the upper part of the screen is the settings from the Config->Engine page. This is a read-only view. Settings can only be changed on the Config->Engine page. Information includes:

- **Enable Caching:** Displays whether cache has been enabled on the Config->Engine page.
- **Programs:** The number of programs in cache.
- **Current Cache Size:** The current size of cache for the node.
- **Cache Limit Processing:** Displays whether cache limit processing has been enabled on the Config->Engine page.
- **Max Cache Memory:** The current maximum value set on the Config->Engine page.
- **Purge Interval: (Minutes):** The purge interval time.

- **Purge Type:** The type of purge selected on the Config->Engine page.

Removing a Program from the Cache

To remove a specific program from the cache, use the **Remove** hyperlink next to the desired program. All information for that program (in the specific environment) will be removed from the cache. If information exists in the cache for the same program in different environments, removing the information from one environment does not remove it from the other environments.

If no programs are available for removal, the Remove hyperlink will not be displayed.

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.

Name: The name of the program.

Env Source: The name of the environment the program was rated in.

Total Bytes: Total bytes of the program.

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.

Clearing the Cache

To remove all information from the cache, click **Clear All**. All information will be removed from the cache.

SERVICES

The Node level Services page allows you to start and stop the Insbridge Connector Service for the selected node. It also allows you to view messages, tasks, and logs for the selected node.

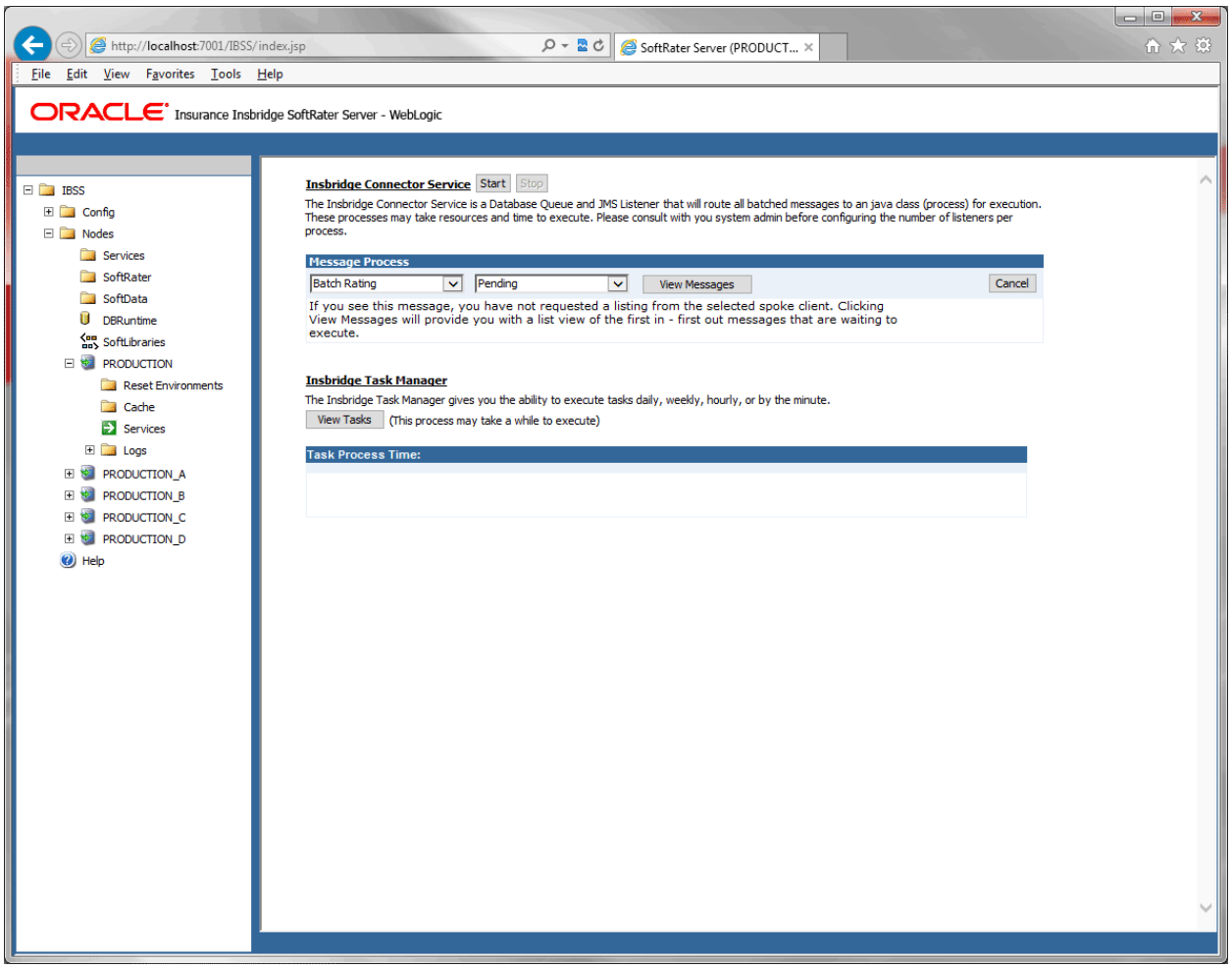


Figure 87 Services

The Insbridge Connector Service for the selected node can be started by clicking the Start button. A status for the node is displayed. Only nodes that are active can be started.

The Message Process and Insbridge Task Manager at the individual node level produce the same types of information found on the Services page higher up. The main difference is that no properties can be set at the individual node level.

For details on the information returned to the Message Process and Insbridge Task Manager, please see Statuses and Actions for Message Processing.

To View Messages in the Queue

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

2. Select the appropriate client from the drop down.

    - Batch Rating
    - Impact Analysis
    - Batch Export Data
    - Batch Import Data
    - Broker - Request
    - Broker - Response

3. Select the status.

    - Pending
    - Processing
    - Completed
    - Failed
    - Canceled
    - Aborted

4. Click View Messages.

5. The listing refreshes and shows any messages that are currently in the queue.

6. To view details on a specific message, click the underlined portion. Information about the message opens in a separate window.

7. To perform an action, click the button at the end of the section.

LOGS

There are two Logs pages. One is for errors and one is for audits. Both pages show a listing of the logs available. By default, information is only logged when an error occurs. Audit logs must be enabled. This can be done on the Config->Engine page.

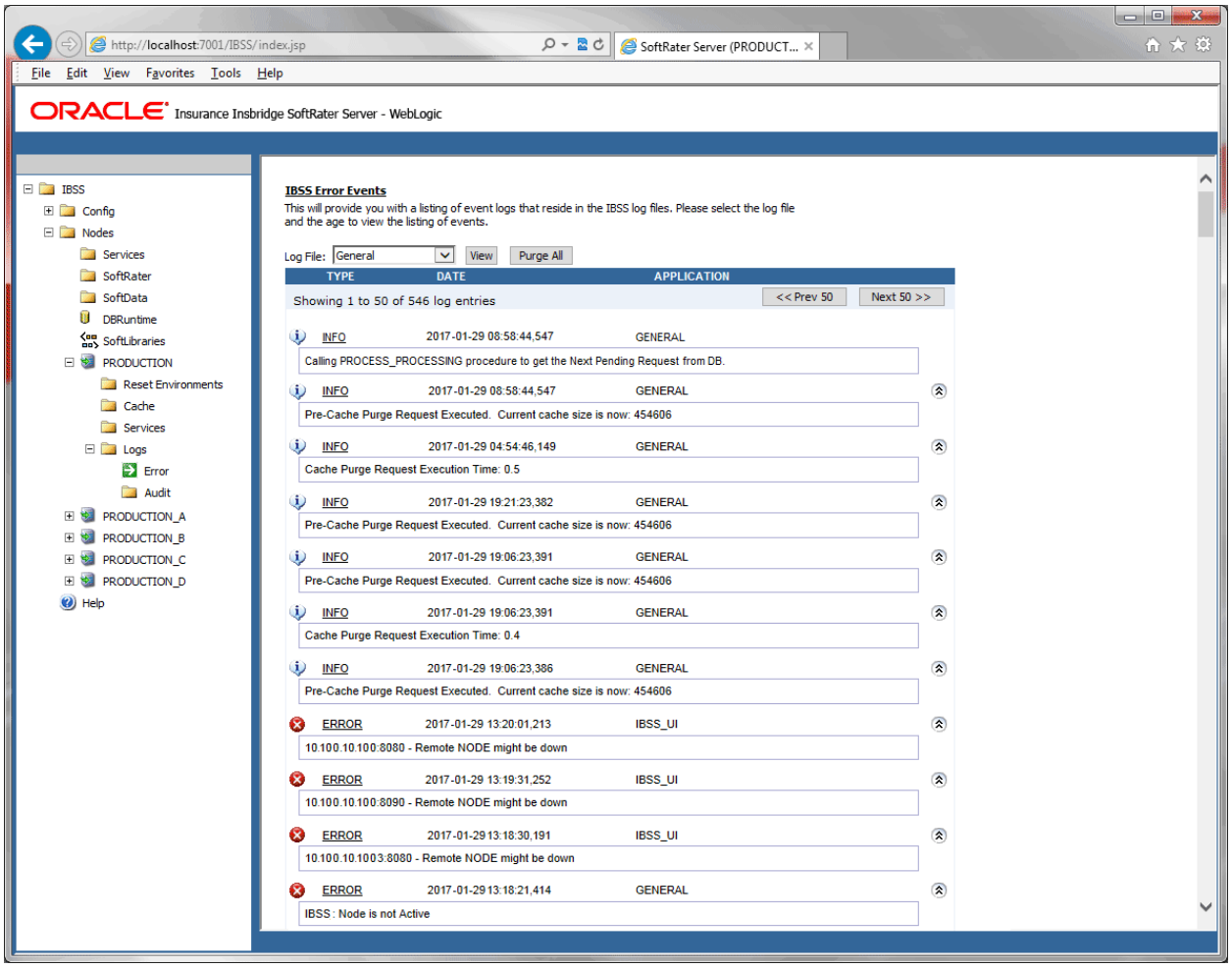


Figure 88 Error Logs Page

Error Logs

Errors get logged whenever the application encounters an exception. The exception can be with the request execution, the request itself, or with the properties configuration. Details regarding the exception can be found in the error logs.

General: General error message logs.

Batch: Error logs for batch files.

Impact Analysis: Error logs for Impact Analysis.

Batch Import/Export: Error logs for batch imports and exports.

Audit Logs

Audit logs are used for tracking the SoftRater engine operations. The Audit logs contain information about the Engine categorized into three different operations, XML, SQL, and SoftRater Runtime Export.

XML: Operational XML that triggered some exception processing.

SQL: SQL text that has generated some exception processing.

SoftRater Runtime Export: Provides an XML view of the entire program that was executed.

To view an error log, click the hyperlink. The log is returned in the text area at the bottom of the screen. If auditing has not been turned on, there will not be any audit logs displayed. To turn audit logging on, please go to the Config->Engine page.

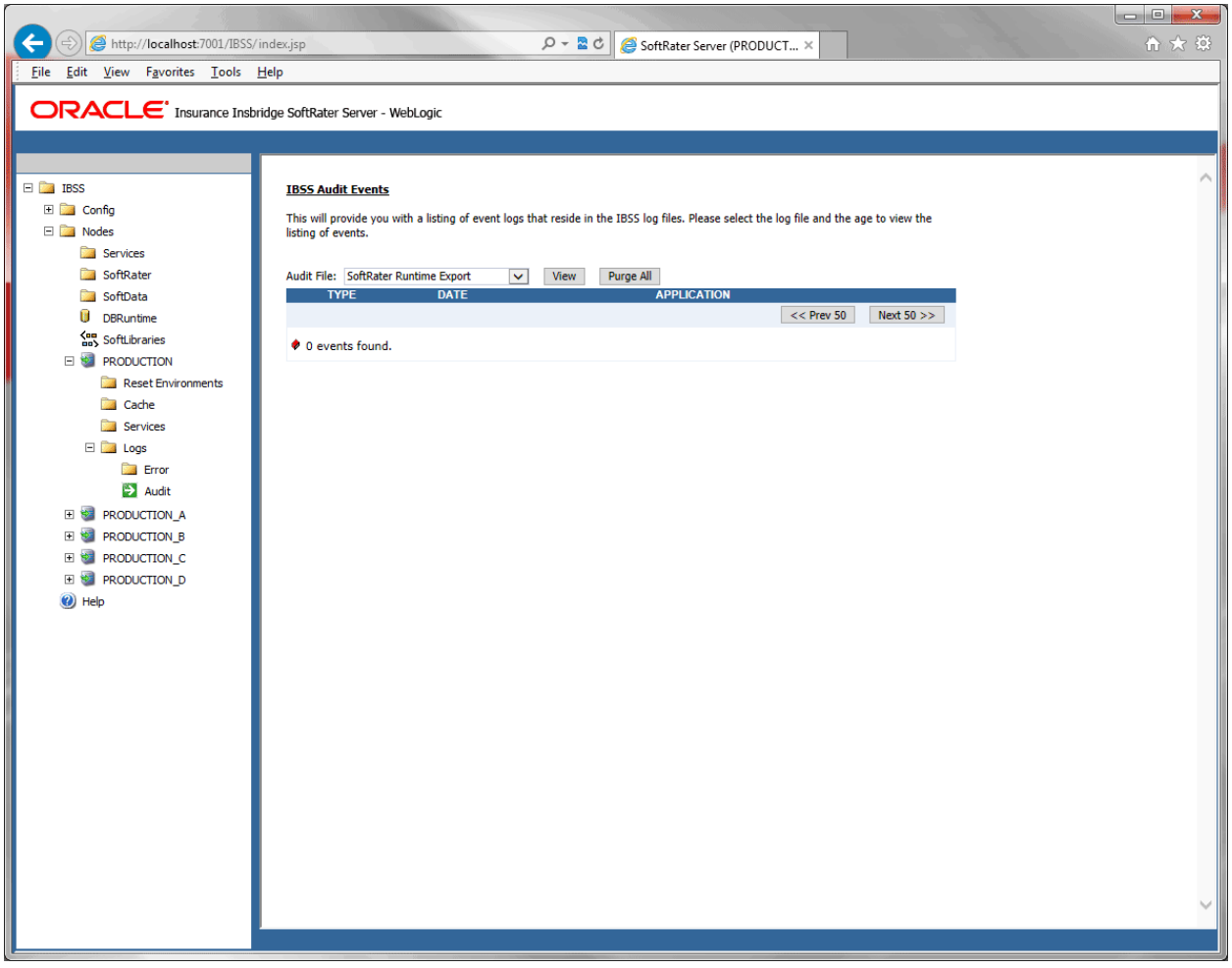


Figure 89 Audit Logs

Viewing Logs on the Server

If you have access to the server where IBSS was deployed, you can view log files in the Instance folder of the node. Each node has an instance folder where logs are stored. The location of the Instance folder was determined at installation time.

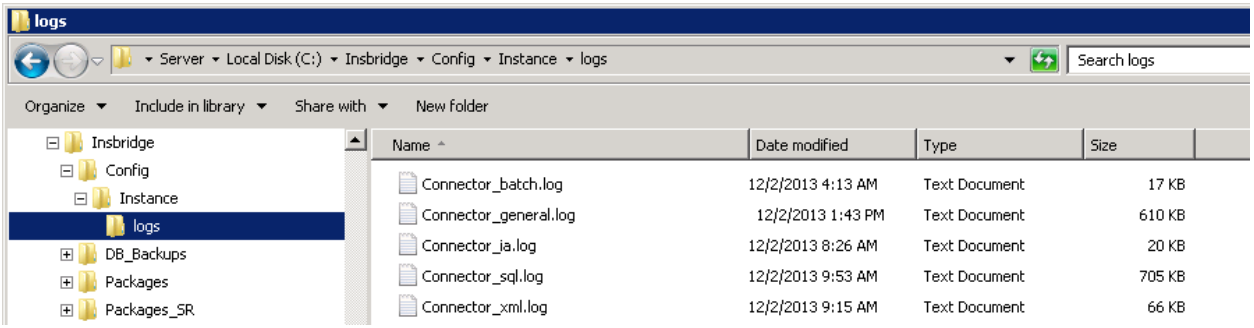


Figure 90 Logs stored on the Server

These are the logging options available and a description of what is being logged in the Instance file.

- **Connector_batch.log:** This is the error plus information log for batches.
- **Connector_general.log:** This is the error plus information log. All errors, warnings, requests, results, and such are logged here. Any SoftRater exceptions are logged here also.
- **Connector_ia.log:** This is the error plus information log for Impact Analysis.
- **Connector_sql.log:** This log records all database queries sent by SoftRater, including table variable lookup, and global versioning selection.
- **Connector_xml.log:** This log records all the rating request and result XMLs. The SoftRater.xml log only logs the rating request XML submitted to a SoftRater instance for both synchronous and batch rating requests. At the point a rating request makes it to SoftRater, the request does not distinguish between the two, since the IBFA Spindle web service is what handles the threading of the requests and the aggregation of the results

If XML Audit Logging option is enabled, it contains both <rate> and <result> nodes, so it logs both the request XML and the result XML.

NOTE: *Library logging is done on the SoftLibraries page on a per program basis.*

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 a 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. For more information, see Dates in the Contents section.
Decimal:	A data type supported for all types of variables and inputs. Examples of decimal values are 3.1415, 18 and 0.995.
Default Value:	Used by a mapped variable if no match is found based on the criteria.
Dependency:	When copying a variable, algorithm or driver assignment, any element that requires another element to be present or defined will be listed. All dependencies must be resolved.
Driver Assignment:	Driver assignment is an auto insurance specific method of assigning a particular driver to a particular vehicle on a policy, based on certain criteria. Criteria often differ on a carrier basis, and sometimes even on a program level.
Driver Assignment Scenario:	A driver assignment scenario is a list of instructions that define the main sequence of operations to properly define the driver assignment logic for a

	carrier. A scenario is based upon the same algorithm principle used throughout the RateManager software.
E	
Export:	Exports allow users to export all elements of a program from one database to another database or within the same database. Or to export data in tab-delimited form, from a RateManager table to an outside location.
F	
Flag:	A variable that holds a 1 for true and a 0 for false.
Flag Driver Algorithm:	An algorithm used by a Flag Driver Function to flag drivers based on certain criteria.
Flag Driver Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Driver Algorithm.
Flag Vehicle Algorithm:	An algorithm used by a Flag Vehicle Function to flag vehicles based on certain criteria.
Flag Vehicle Function:	A built-in function used in the main driver assignment that defines the scope of the flagging operation. Most require an association with a predefined Flag Vehicle Algorithm.
G	
Global:	An input or variable that is available to all programs under a specific subline.
Global Input:	A value that is passed into the rating system.
Global Result:	A value that is passed out of the system after rating.
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. For more information, see If in the contents section.
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	
Mapped Variable:	A variable that uses other variables and inputs as criteria in determining the appropriate value. See Mapped Variables in the Contents section for more information.
Mask:	A feature that allows the customer to determine how data should be interpreted. See Masking in the Contents section for more information.
N	
Naming Standard	A uniform naming structure to system elements and programs.
Normal Rating Algorithm:	The most common type of algorithm. Examples of what it can be used for are: • Determine premiums • Calculate differences in limits being passed into the system vs. limits being rated by the system • Assign tiers
O	
Operator:	A built-in mathematical function used in calculations and comparisons.
P	
Package:	A small file that holds all the RateManager logic for a specific program and version.
Package Location:	A pointer to a location where SoftRater Packages (SRP's) are stored.
Physical Environment	A physical environment is generally referred to as a physical machine.
Program:	A planned group of procedures executed in a specific order to return a rating. Programs in RateManager typically correspond to rate manuals. Programs can be either created by the users or imported.
Program Date Mask:	Specifies how SoftRater interprets dates being passed into an input file.
Program Folders:	A RateManager file management system that functions in much the same way as Microsoft Windows Explorer. This multi level setup allows for an unlimited number of program folders and subfolders to be placed underneath a subline.
R	
Rank Driver Algorithm:	An algorithm used by a Rank Driver Function to rate drivers based on certain criteria.

Rank Driver Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rank Driver Algorithm.
Rank Vehicle Algorithm:	An algorithm used by a Rank Vehicle Function to rate vehicles based on certain criteria.
Rank Vehicle Function:	A built-in function used in the main driver assignment that defines the scope and sorting order of the ranking operation. Most require an association with a predefined Rate Vehicle Algorithm.
Rating Environment:	The physical machine(s) where SoftRater is installed. This is typically the same as a SoftRater node.
Reconcile:	A comparison feature that compares one program version against another version in the same program and generate a report of the differences.
Restrictions:	Limitations on viewing and editing pages and fields in the system. Restrictions are assigned and changed by the Administrator.
Result Mapping:	A defined set of results, inputs and variables displayed in the output file.
Revision:	A variable specific type of versioning. See Versioning in the Contents section for more information.
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. See Sequencing in the Contents section for more information.
SoftLibrary:	A SoftLibrary is a specially developed program that performs a specific task. SoftLibraries may run their own code or call upon other systems to obtain information outside of RateManager, for example, obtaining a credit score
SoftRater Node	A SoftRater node is either an IBFA (without RateManager) or IBSS instance on a physical environment.
Source:	The source is the creator of a template and will also be the name of the new subline.
SR:	SoftRater. The engine that executes the rating, rules and underwriting instructions defined within RateManager. The rating environment for runtime execution and processing of business content. SoftRater can be further defined by the operating system where it has been loaded.
SRP:	SoftRater Packages. A package that holds all the RateManager logic for a specific program and version.
SR-JAVA:	SoftRater for Java. This is also another name for IBSS.
SR-WIN:	SoftRater for Windows. This is also another name for IBFA.
String:	A data type supported for all types of variables and inputs. Examples of string values are "2.718", "The quick brown fox jumps over the lazy dog." and "001".
Subline:	Sublines are classifications that fall in between lines of business and program folders. Sublines allow for the separation of programs by source.
T	
Tab-delimited:	A type of text file in which columns are separated by tabs. This is the required format for importing tables into RateManager.

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. See Versioning in the Contents section for more information.
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. See Variables in the Contents section for more information.
Working Category:	A classification used to define how elements should run. See Categories in the Contents section for more information.
X	
XML ID:	A number automatically assigned by RateManager to identify inputs and categories.

INDEX

<

<ibdoc>, 80
<stats> node
  IBSS, 49

A

Abort
  Message Process Action, 71
Accessing
  Home Page, 17
Actions
  Message Process, 71
Active
  Library Status, 94, 95
Add a root node to the results?, 80
Add company descriptions to the results?, 80
Add descriptions to the result items?, 80
Add New Environment
  IBSS, 27
Add Node, 41
Add Results to Custom Inputs
  MapRequest Operators, 83
Add SoftLibrary Link, 90
Add Subscriber, 22
Add the program inputs to the results?, 80
AddHeading
  Operators, 80
Adding
  Arguments, 96
  Node, 41
  Root Node, 80
  SoftLibraries, 91
AddInputs
  Operators, 80
AddResultDesc
  Example, 80
  Operators, 80
AddResultEmpty
  Operators, 81
AddRoot
  Operators, 80
Admin Email
  Edit Process Configuration, 72
Admin Name
  SoftLibraries, 94
Administrator
  Security, 52
All
  Debug Module Tracing, 106
Application Servers
  Ports, 13
Arguments
  Adding, 96
  Deleting, 96
  Editing, 96
  SoftLibraries, 92
Assembly Process
  Debug Module Tracing, 106
Assembly Process WebService
  Node Management, 104
Asterisk
  Node Name, 59
Audit Logs
  Nodes, 115
  SoftRater Runtime Export, 115
  SQL, 115
  XML, 115
Auditing
  Config Page, 48
Authoring Environment Definition, 118
Auto Logging
  Program Template, 48
  SQL, 48
  XML, 48
Auto Release
  Config Page, 48

B

Batch Export Data
  Edit Process Configuration, 73
Batch Import/Export
  Error Logs, 114
Batch Node
  Error Logs, 114
Batch Rating
  Edit Process Configuration, 73

C

Cache
  Configuring, 49
  Enabled, 49
  Node, 110
  Node Functionality, 107
Cache Enabled Date
  Cached Program Listing, 111
  Time Stamp, 111
Cache Options
  Clearing in IBSS, 111
  Configuring for Node, 110
  Removing a Program in IBSS, 111
Cached Program Listing
  Cache Enabled Date, 111
  Environment, 111
  Package Creation Date, 111
  Program Cache Settings, 111

Remove, 111
Total Hit Rows, 111
Total Miss Rows, 111
Cancel
Message Process Action, 71
Changing Password, 54
Class Name
SoftLibraries, 94, 95
Clearing
Program from Cache in IBSS, 111
Config Page
Auditing, 48
Auto Release, 48
Edit Options, 47
Engine, 47
Logs, 51
Stats, 48
Config Path
Node Management, 104
Configuration File
Overview, 18
Viewing, 18
Configure
Rating Environments, 27
Configuring
Cache, 49
Cache Options, 110
Connector Service
Debug Module Tracing, 106
Connector_batch.log
Logs, 116
Connector_general.log
Logs, 116
Connector_ia.log
Logs, 116
Connector_sql.log
Logs, 116
Connector_xml.log
Logs, 116
Context Factory
SoftLibraries, 95
Creating
Environment Setup, 27, 34
Nodes, 43
CSRF
Security, 52
Custom
Mapping, 82, 83
Custom Input XML
MapRequest Operators, 82
Custom Output XML
MapRequest Operators, 83
Custom XML Mapping, 82

D

Database Types
Environment Setup, 29, 31
DBRuntime
Overview, 88
Debug Module Tracing
All, 106
Assembly Process, 106
Connector Service, 106
JMS, 106
Modules, 104
Node Management, 104
Remote Call, 106
SoftRater Batch, 106
SoftRater Batch ExecQueue, 106
SoftRater Cache, 106
SoftRater Locator, 106
SoftRater Web Services, 106
Task Manager, 106
WorkManager, 106
Debug Rate?, 81
DebugRate
Operators, 81
Definition
SoftRater Server, viii
Deleting
Arguments, 96
Environment Setup, 38
Node, 45
SoftLibraries, 101
Subscriber, 25
Description
Subscriber, 24

E

Edit Options
Config Page, 47
Edit Process Configuration
Message Process, 72
Edit Subscriber, 25
Editing
Arguments, 96
Environment Setup, 27, 34
Nodes, 43
SoftLibraries, 100
Subscriber, 25
Editing Arguments
SoftLibraries, 96
Editing Lookup URLs
Node Management, 104
Edition Notice, ii
Email
Edit Process Configuration, 72
Email Notifications
Insbridge Connector Service, 64
Enabled
Cache, 49
Program Cache Settings, 49
Enabling Security, 53
Engine
Config Page, 47
Entering in IBFA
SoftLibraries, 95
Entering in IBSS
SoftLibraries, 92
Environment
Cached Program Listing, 111
Environment Setup

Creating, 27, 34
Database Types, 29, 31
Deleting, 38
Editing, 27, 34
IBSS, 27
Provider Types, 28, 29, 31
Query Block, 28
SoftRater Page, 27
Testing, 37
EnvRef
Operators, 81
Error Logs
Batch, 114
Batch Import/Export, 114
General, 114
Impact Analysis, 114
Node, 114
Example
AddResultDesc, 80

F

File
InsbridgeDataRequest.XML Format, 85
Testing SoftData Test Interface, 85

G

General Node
Error Logs, 114
GetHelpText
SoftLibraries, 92
GetHelpText Screen, 97
GetLog
SoftLibraries, 92
GetLog Screen, 99
Global
Mapping, 82, 83

H

Home Page
Accessing, 17
HTTPS
Node, 41

I

IBER Definition, 119
IBFA Definition, 119
IBRU Definition, 119
IBSS
Add New Environment, 27
Environment Setup, 27
Labels, 20
Logging Information, 48
Statistical Information, 48
Time Stamp, 49
IBSS Definition, 119
IBSS Home Page
Options, 20
Overview, 17
IBSS Page
Node, 41
IBSS UI
Impact Analysis, 106
ID
Subscriber, 24
Impact Analysis
Edit Process Configuration, 73
IBSS UI, 106
Impact Analysis Node
Error Logs, 114
Implementation Interfaces
Required, 90
Include empty items in the results?, 81
Information Page
Node Management, 103
Input Processor Name
MapRequest Operators, 83
Input Processor Type
MapRequest Operators, 82
Insbridge Connector Service
Connector Properties, 62
Email Notifications, 64
Get Status, 56, 59
JMS, 66
Options, 60
Properties, 61
Setting Properties, 61
Simultaneous Jobs, 62
Starting, 68, 112
Stopping, 68, 112
Testing Properties, 67
Insbridge Task Manager
Overview, 75
Properties, 75
View tasks, 77
Insbridge Task Service
Node Management, 104
InsbridgeDataRequest.XML Format
Request File, 85

J

JAR File Placement
SoftLibraries, 91
JBoss
Port, 15
JMS
Debug Module Tracing, 106
Insbridge Connector Service, 66

L

Labels
IBSS, 20
Library
SoftLibraries, 92
Library Information Screen, 93
Line of Business
MapRequest Operators, 82
Links

Add SoftLibrary, 90
Local
Mapping, 82, 83
Local File Dir
Node Management, 104
Location Name
SoftRater Page, 20
Log Page
Node, 114
Logging
SoftLibraries, 94, 95
Logging Information
IBSS, 48
Logging Out, 53
Logical Environment Definition, 120
Logs
Config Page, 51
Connector_batch.log, 116
Connector_general.log, 116
Connector_ia.log, 116
Connector_sql.log, 116
Connector_xml.log, 116
Node Functionality, 108
Viewing on Server, 116
Lookup Entries
SoftLibraries, 94
Lost Password, 55

M

Mapping
Custom, 82, 83
Global, 82, 83
Local, 82, 83
MapRequest Operators, 82
Add Results to Custom Inputs, 83
Input Process Type, 82
Input Processor Name, 83
Line of Business, 82
Output Processor Name, 83
Output Processor Type, 83
Program, 82
Subscriber, 82
Version, 82
Message Process
Abort Status, 71
Aborted Status, 71
Actions, 71
Cancel Status, 71
Cancelled Status, 71
Completed Status, 71
Edit Process Configuration, 72
FailedStatus, 71
Pending Status, 70
Processing Status, 70
Purge Status, 71
Status, 70
Message Queue
Viewing, 112
Modules
Debug Module Tracing, 104

N

Name
SoftLibraries, 90
Subscriber, 24
Naming
SoftLibraries, 95
Native Entries
SoftLibraries, 93
Node
Audit Logs, 115
Cache, 110
Creating, 41, 43
Deleting, 45
Editing, 43
Error Logs, 114
Log Page, 114
Reloading Environment, 57, 108
Reset Environment, 57, 108
Services, 112
Using HTTPS, 41
Node Functionality
Cache, 107
Logs, 108
Overview, 107
Reset Environment, 107
Services, 107
Node Management
Assembly Process WebService, 104
Config Path, 104
Debug Module Tracing, 104
Editing Lookup URLs, 104
Information Page, 103
Insbridge Task Service, 104
Local File Dir, 104
Node Name, 104
Overview, 103
Program Cache Options, 110
Server Name, 104
SoftData WebService, 104
SoftRater WebService, 104
SoftServices WebService, 104
Version, 104
Node Name
Node Management, 104
Nodes
Current Location, 59
Insbridge Connector Service, 56, 59, 60
Overview, 56
Reset Environment Configurations, 56
non-Windows Setup for Batch
Edit Process Configuration, 73

O

Operators
AddHeading, 80
AddInputs, 80
AddResultDesc, 80
AddResultEmpty, 81
AddRoot, 80
DebugRate, 81

EnvRef, 81
Optional Map Request, 82
Optional Rate, 80
Worksheet, 81
Optional Map Request Operators, 82
Optional Rate Operators, 80
AddHeading, 80
AddInputs, 80
AddResultDesc, 80
AddResultEmpty, 81
AddRoot, 80
DebugRate, 81
EnvRef, 81
Worksheet, 81
Options
IBSS Home Page, 20
MapRequest Operators, 82
Rate Operators, 80
Oracle Setup
Service Name, 29
SID, 29
Output Processor Name
MapRequest Operators, 83
Output Processor Type
MapRequest Operators, 83
Overview
Configuration File, 18
DBRuntime, 88
IBSS Home Page, 17
Insbridge Task Manager, 75
Node Functionality, 107
Node Management, 103
Services Page, 60, 112
SoftData Test Interface, 85
SoftLibraries, 89
SoftRater Server, 10
SoftRater Test Interface, 78
Subscriber, 22

P

Package Creation Date
Cached Program Listing, 111
Time Stamp, 111
Package Location Definition, 120
Password
Resetting, 55
Password Rules, 55
Physical Environment Definition, 120
Ping
SoftLibraries, 92
Ping Screen, 98
Port
JBoss, 15
WebLogic, 16
WebSphere, 14
Ports
Application Server, 13
Program
MapRequest Operators, 82
Program Cache Options
Node Management, 110
Program Cache Settings
Cached Program Listing, 111
Enabled, 49
Program Template
Auto Logging, 48
Properties
Insbridge Connector Service, 61
Insbridge Task Manager, 75
Provider Types
Environment Setup, 28, 29, 31
Purge
Message Process Action, 71

Q

Query Block
Environment Setup, 28
Queues
Message, 69

R

Rate Operators, 80
RateManager
Adding Subscribers, 22
SoftLibraries, 90
Rating Environment Definition, 121
Reloading Environment
Node, 57, 108
Remote Call
Debug Module Tracing, 106
Remove
Cached Program Listing, 111
Removing
Program from Cache in IBSS, 111
Request File
InsbridgeDataRequest.XML Format, 85
RequestXML
SoftLibraries, 92
RequestXML Screen, 97
Required
Implementation Interfaces, 90
Reset Environment
Node Functionality, 107
Reset Environments
Node, 57, 108
ResponseXML
SoftLibraries, 92
ResponseXML Screen, 98
Results
Adding Descriptions, 80
Root Node Information, 80
RM Definition, 121
RMI
SoftLibraries, 95
Root Node
Adding, 80
Rules
Deleting Subscriber, 25
Run Time
SoftRater, 80
Running

Show Time Stats, 49

S

Sample Message
SoftLibraries, 102
Security
Changing, 54
CSRF, 52
Enabling, 53
Logging Out, 53
Overview, 52
Password Rules, 55
Server
Viewing Logs, 116
Server Name
Node Management, 104
Services
Node, 112
Node Functionality, 107
Services Page
Overview, 60, 112
Setting
Email Addresses, 64
Insbridge Task Manager Properties, 75
JMS, 66
Jobs, 62
Thread, 63
Threads, 62
Setting Properties Insbridge Connector Service, 61
Show Time Stats
Running, 49
Start, 49
Stop, 49
SoftData Test Interface
Overview, 85
Testing, 85
SoftData WebService
Node Management, 104
SoftLibraries
Adding, 91
Admin Name, 94
Arguments, 92
Class Name, 94, 95
Context Factory, 95
Deleting, 101
Displaying in RateManager, 90
Editing, 100
Editing Arguments, 96
Entering in IBFA, 95
Entering in IBSS, 92
Fields, 90
GetHelpText, 92
GetLog, 92
Implementation Interfaces, 90
Java Class Library, 91
Library, 92
Logging, 94, 95
Lookup Entries, 94
Name, 90
Naming, 95
Native Entries, 93
Overview, 89
Ping, 92
RequestXML, 92
ResponseXML, 92
RMI, 95
Sample Message, 102
Status, 90, 94, 95
Test, 93
Type, 90
URL Host, 95
URL Port, 95
SoftLibrary Logging, 48, 85
SoftRater
Determining Run Time, 80
Verifying Input Values, 80
SoftRater Batch
Debug Module Tracing, 106
SoftRater Batch ExecQueue
Debug Module Tracing, 106
SoftRater environment definition override?, 81
SoftRater Locator
Debug Module Tracing, 106
SoftRater Node Definition, 121
SoftRater Packages
Environments, 120
SoftRater Page
Environment Setup, 27
Location Name, 20
SoftRater Runtime Export
Audit Logs, 115
SoftRater Server
Definition, viii
Overview, 10
SoftRater Test Interface
Overview, 78
SoftRater Web Services
Debug Module Tracing, 106
SoftRater WebService
Node Management, 104
SoftRter Cache
Debug Module Tracing, 106
SoftServices WebService
Node Management, 104
SQL
Auto Logging, 48
SQL Node
Audit Logs, 115
SR Definition, 121
SR-JAVA Definition, 121
SRP Definition, 121
SR-WIN Definition, 121
Start
Show Time Stats, 49
Starting
Insbridge Connector Service, 68, 112
Starting Insbridge Connector Service, 60
Statistical Information
IBSS, 48
Stats
Config Page, 48
Status
Aborted, 71

Cancelled, 71
Completed, 71
Failed, 71
Message Process, 70
Pending, 70
Processing, 70
SoftLibraries, 90, 94, 95
Stop
Show Time Stats, 49
Stopping
Insbridge Connector Service, 68, 112
Stopping Insbridge Connector Service, 60
Subscriber
Deleting, 25
Deletion Rules, 25
Editing, 25
Information, 24
MapRequest Operators, 82
Overview, 22
Types, 22
Support, 117

T

Task Manager
Debug Module Tracing, 106
Test
SoftLibraries, 93
Test Connection
IBSS, 37
Test Screen, 99
Testing
Environment Setup, 37
SoftData Request File, 85
SoftData Test Interface, 85
Testing Connector
Insbridge Connector Service, 67
Threads
Insbridge Connector Service, 62
Setting, 63
Time Stamp
Cache Enabled Date, 111
IBSS, 49
Package Creation Date, 111
Total Hit Rows
Cached Program Listing, 111
Total Miss Rows
Cached Program Listing, 111
Tracing
Node Management, 104
Type
SoftLibraries, 90
Subscriber, 24
Types
Input Mapping, 82, 83
Subscriber, 22

U

URL Host
SoftLibraries, 95
URL Port
SoftLibraries, 95

V

Version
MapRequest Operators, 82
Node Management, 104
VFS Definition, 122
View Tasks
Insbridge Task Manager, 77
View XML
Internet Explorer, 84, 85, 88
Viewing
Configuration File, 18
Message Queue, 112
Virtual File Server Definition, 122

W

WebLogic
Port, 16
WebLogic Port
7001, 13
WebSphere
Port, 14
WorkManager
Debug Module Tracing, 106
Worksheet
Operators, 81

X

XML
Auto Logging, 48
Submitting Custom, 82
XML Files
Testing a Rating, 84
XML Node
Audit Logs, 115