Oracle® Insurance IStream

IStream Document Manager Glossary

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IStream Glossary

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A

Add-In

A small application that is embedded within a larger application and which contains specific IStream Document Manager functionality. Also known as a *plug-in*.

The available add-ins are:

- *IStream Assembler Add-in for Microsoft Word* on page 9
- *IStream Author Add-in for Microsoft Word* on page 10
- *DMS Plug-in for IStream Author* on page 7

Administrator

A type of Role. An Administrator's duties including creating and maintaining user profiles. See also *System Administrator* on page 14.

After

A Customization Mode that inserts the Custom Wording after a Tagged Text Block.

Assembled Document

See *IStream Document* on page 10.

Assembler/Assembly

See *IStream Assembler* on page 9.

Assembler Add-in

See *IStream Assembler Add-in for Microsoft Word* on page 9 and *IStream Assembler Add-in for Microsoft Word* on page 9.

Assembly Server

See *IStream Assembly Server* on page 9.

Assembly Toolkit
See *IStream Assembly Toolkit* on page 9.

Attribute
A field or data value that describes a document or other item, that is stored as metadata to use in searches in the DMS. For example, the policy number `123` is an attribute value of the policy. Attributes allow you to search for specific documents.

Author
See *IStream Author* on page 9.

Author Add-In
See *IStream Author Add-in for Microsoft Word* on page 10.

Authoring Language
The technical vocabulary or code that consists of various Rules, Variables and Functions. This code controls how data is retrieved from the system and how the IStream Document will be assembled during the Generation process.

Also called *code*, *IStream code* and *model document language*.

B

Before
A Customization Mode that inserts a Custom Wording before a Tagged Text Block.

Business Variable
A variable used in Model Documents. It consists of the '@' symbol, a Variable name and an optional index name.

C

Calligo
The previous name for IStream Document Manager.

Category
A classification or type of group of documents and other items in the DMS. For example, car insurance can be a category. This is a line of business within an insurance company; you would typically want to search within that category.

CDS File
See *Section* on page 14.

Checked In
A state that a document enters when it is closed. After you check in a document, it becomes unlocked, or unreserved, in the DMS. Someone else can open (or *check out*) the document to customize it.

Checked Out
A state that a document enters when it is opened. After you check out a document, it becomes locked, or reserved, in the DMS. No one else can customize the document until it is Checked In again.

Communicator
See *IStream Communicator* on page 10.

Compilation
The process of converting a Master Section or a Section and all of its related elements into a format that can be used to generate an IStream Document. Compare with *Generation* on page 8.

CMS File
See *Master Section* on page 12.

Code
See *Authoring Language* on page 6.

Customization
The process of applying Custom Wordings to a document.

Customization Mode
A type of change that you can make to a document. The four mode types are: Before, After, Replace and Delete.

Customizer
See *IStream Customizer* on page 10.

Custom Wording
Changes applied to a Tagged Text Block of a specific IStream Document.

D

Delete
A Customization Mode that removes a Tagged Text Block.

DMS
The Document Management System portion of IStream Document Manager.

DMS Plug-in for IStream Author
An Add-In that allows you perform DMS functionality within IStream Author.

Document Assembly
See *IStream Assembler* on page 9.

Document Manager
See *IStream Document Manager* on page 10.

Double Pipe
A method of syntax for specifying InfoSources, consisting of two pipe characters (||). It is not supported by the File System InfoSource. See also *Single Pipe* on page 14.

E

EasyText
A feature in IStream Author that allows you to easily drag and drop a formatted text item into a Model Document.

Effective Date

A date that indicates when a section or custom wording will be included in a document. Effective Dates are used with Termination Dates to specify a date range.

In IStream Author, the Effective Date determines which Sections should be included in the IStream Document.

The Effective Date is also the start date of a Custom Wording. An effective date instructs IStream Assembler when to start including the Customization in the document.

Effective and Termination Dates also appear in the Model Document Outline.

Extensibility Toolkit

See *IStream Extensibility Toolkit* on page 10.

F

File System InfoSource

A file system type of InfoSource that provides access to documents as a flat external file. It recognizes all file types, including those which might not be considered as documents in terms of a DMS. Documents are stored locally or or on a network drive, and are generally not shared with other authors. Compare with *IStreamDM Infosource* on page 10.

Function

A command that performs an action on a Variable.

G

Generated Document

See *IStream Document* on page 10.

Generation

The process of creating an IStream Document from a Model Document. The generation process retrieves the necessary text from the Model Document and its Sections, based on the Model Document's Key Data. Compare with *Compilation* on page 7.

Generation Test Date

A date for testing Custom Wordings and document sections that have different Effective Dates.

I

InfoConnector

See *IStream InfoConnector* on page 11.

InfoSource

An area where documents are produced, managed and stored. There are two categories of InfoSources: those that point to the database that contains the data for the output document, and those that point to document storage (Repository) locations.

Infosource types include the File System InfoSource, IStreamDM Infosource, IStreamXML InfoSource, ODBC InfoSources and User Database InfoSource See also *UISR* on page 16.

InfoSource Administrator

The previous name for IStream InfoConnector.

Integration

See *IStream Integration* on page 11.

IStream

The brand name for the IStream suite of applications.

IStream Assembler

An application that processes authored Model Documents and creates generated, or assembled, documents. These documents are called IStream Documents. Assembler provides options for changing the Repository where the IStream Documents are stored.

IStream Assembler provides two options for Generation: local and remote. Local generation occurs on the same computer where Assembler is installed (provided that a local IStream Assembler, which comes with IStream Author Workstation, is also installed on the same computer). Remote generation occurs on a remote server through which IStream Assembly Server is accessed.

See also *Generation* on page 8.

IStream Assembler Add-in for Microsoft Word

An Add-In within Microsoft Word that allows you to generate or regenerate IStream Documents, and convert your IStream Documents to PDFs.

IStream Assembly Server

A server that generates IStream Documents. You access it through the DMS user interface and from IStream Assembler itself. To generate documents with IStream, there must be one or more IStream Assembler servers available to the IStream Integration (through Administration). An IStream Assembler server can be used by one or more IStream servers and each IStream server can use one or more IStream Assembler servers.

IStream Assembly Toolkit

The portion of the IStream Toolkit that allows you to access IStream document Generation functionality with other applications.

Compare with *IStream Extensibility Toolkit* on page 10.

IStream Author

The document authoring software that is part of IStream Document Manager. It allows authors or document specialists to create, edit, and test Sections and Model Documents. Documents can range from complex, multi-page, multi-format contracts, to statements with extensive Customization, and even simple correspondence. See also *DMS Plug-in for IStream Author* on page 7 and *IStream Visualizer* on page 11.

IStream Author features include EasyText, IStream Visualizer, and the Model Document Outline.

IStream Author Add-in for Microsoft Word

An Add-In within Microsoft Word that allows you to create new Sections, convert Word files to Sections or.Master Sections, generate or regenerate IStream Documents, and convert your IStream Documents to PDFs.

IStream Code

See *Authoring Language* on page 6.

IStream Communicator

A web-based application that automates the process of creating and managing a wide range of personalized correspondence types, and delivering these through multiple channels.

IStream Customizer

An application that helps modify your document to include changes in the text that apply for specified periods of time or to specific documents or generations of documents. These changes are regenerated as a new document during the time the wordings are in effect; however, you cannot make permanent changes to the Model Document on which the changed document is based.

Customizer is useful where there is a need to customize documents in a very controlled way and retain those Customizations during subsequent document regenerations.

Customizer is an optional add-on in IStream Document Manager.

IStream Document

A generated document based on a Model Document. IStream documents are created by generating documents in IStream Author or IStream Customizer. If an IStream document contains Custom Wording tags, it can be customized in IStream Customizer.

Also called a *generated document*, *.CLG file*, or an *assembled document*.

IStreamDM Infosource

A type of InfoSource where documents are stored on the IStream DMS. You may store your Model Documents can be stored on the DMS, where many people can access them. They are also available to others who can generate IStream Documents from these models documents. Compare with *File System InfoSource* on page 8.

IStream Document Manager

A suite of integrated applications for creating, managing and distributing personalized, complex documents. It includes document assembly, document management, search, workflow, collaboration and customization functionality. See also *DMS* on page 7.

IStream Extensibility Toolkit

The portion of the IStream Toolkit that allows other applications to access repositories and the DMS.

Compare with *IStream Assembly Toolkit* on page 9.

IStream InfoConnector

An application for managing multiple InfoSources so that you can take advantage of on-site business knowledge in more than one data source. (Previously called the *InfoSource Administrator*.)

IStream Integration

Incorporates IStream Document Manager functionality (Object types and so on) within the DMS. It Includes the IStream Modules and IStream Servlet.

IStream Modules

A set of components that the DMS uses. They include the IStream Servlet and IStream Proxy Server. The IStream modules allow you to generate, regenerate and compile Model Documents and render them to PDF files. They are also part of IStream Integration.

IStream Proxy Server

A server that is required for compiling Model Documents and rendering PDF files. It is installed with the IStream Assembler components.

IStream Publisher

An application that allows you to use pre-defined services for document retrieval, assembly, rendering, delivery and storage, and allows you to define custom services.

IStream Servlet

A servlet that allows you to generate, regenerate and compile Model Documents. It is part of IStream Integration.

IStream Toolkit

A set of libraries and documentation that allow you to integrate IStream components with your company's or other third party applications.

The toolkit is made up of the IStream Assembly Toolkit and the IStream Extensibility Toolkit.

IStream Visualizer

A module within IStream Author that allows you to dynamically create charts and graphs.

IStreamXML InfoSource

An InfoSource that uses XML as the source for data. It may be configured to act as a standard IStream XML InfoSource or an enhanced XPath (XML Path Language) XML InfoSource. The IStream Assembler Engine uses the XML InfoSource during document generation to retrieve data from the XML file.

IStream Writer

An application that streamlines the processes of product development, state filing creation and policy production. When used with IStream Author, Writer reduces time and effort required to create Model Documents that serve as templates for creating customer specific policies, contracts and other documents.

K

Key Data

Identifying data that is associated with an IStream Document.

There are two types: persistent and non-persistent.

Persistent key data "persists" or stays with the document and is not requested on regeneration.

Non-persistent key data is requested each time the document is generated. When IStream Publisher creates an IStream Document that requires both persistent and non-persistent key data, generation problems can occur. Therefore, avoid using both types of key data in the same document.

L

Launcher

An application that allows you to manage the product development process. It provides accountability during the process for tracking and streamlining the cross-functional product development process and uses workflows and collaboration project areas.

You can use Launcher with Tracker and with a DMS.

LiveLink

A third-party application which the IStream DMS is based on.

Local Generation

See *Generation* on page 8.

M

Master Section

The primary document in a Model Document. It contains the Key Data definitions and certain other properties that allow for the assembly of IStream Documents. Master sections have a .CMS file extension. Compare with *Section* on page 14.

Message Log

Records all messages sent out by the IStream Assembly Server during generation.

MIME

MIME (Multipurpose Internet Mail Extensions) is a specification for formatting web pages that are not in HTML format.

The MIME type of IStream Documents is Microsoft Word. The Microsoft Word properties of an IStream Document allows you to view the document in the browser, the way that it would be printed and distributed.

Model Document

A document created in IStream Author that contains a Master Section and one more Sections. It can also contain Custom Wording tags. Model documents are used to generate IStream Documents. IStream Documents with Custom Wording tags can be customized in IStream Customizer.

Model Document Language

See *Authoring Language* on page 6.

Model Document Outline

A module in IStream Author that allows you to easily create and maintain your Model Documents through a “tree view” of a model document’s sections. Using the Model Document Outline, you can specify effective and termination dates for each section, identify rules for when the section will be included and easily reorder sections.

Modules

See *IStream Modules* on page 11.

O

ODBC InfoSources

Any ODBC-compliant database you may use as a data source, such as SQL, Access and Oracle. ODBC databases differ from user databases in that they do not contain any mapping, and therefore no SQL queries are hard-coded.

P

Permission

An attribute that defines what actions can be performed on a particular document.

Privilege

An attribute that defines what actions you can perform on a document.

Publisher

See *IStream Publisher* on page 11.

Proxy Server

See *IStream Proxy Server* on page 11.

Q

QuickGen (Quick Generation)

A feature in IStream Customizer that enables you to immediately see changes made to a document through adding, editing or removing Custom Wordings. It is similar to Generation but faster because it does not require IStream Customizer to connect to the database to retrieve Variable values.

R

Regenerating

The process of creating an existing IStream Document (by adding all of the Customizations that have been attached to it) from IStream Customizer, the DMS, IStream Assembler or the IStream Assembler Add-in for Microsoft Word.

Remote Generation

See *Generation* on page 8.

Replace

A Customization Mode that replaces the Tagged Text Block with a Custom Wording.

Repository

A location where files are stored. Repositories are defined as InfoSources using IStream InfoConnector. InfoSource repositories include IStreamDM Infosource repositories and IStreamFS (File System InfoSource) repositories.

Role

The type of user in an application. Your role determines what areas of an application you can access and what functions you can perform. You may have more than one role assigned to you.

Rule

A command that instructs the system to insert text into an IStream Document if a particular condition is met.

S

Section

The part of a Model Document that can be referenced by a Master Section. A section contains formatting, text, graphics and some code.

You can use the `INCLUDE` rule in a Master Section or a section to add it to a Model Document.

Sections have a .CDS file extension and are sometimes called sub-sections.

SDK (Software Development Kit)

See IStream Toolkit.

Section Name

The name of the section of the Model Document which the IStream Document was generated from.

Servlet

See *IStream Servlet* on page 11.

Single Pipe

A method of syntax for specifying InfoSources, consisting of one pipe character (|).The single pipe character is not supported by the File System InfoSource. See also *Double Pipe* on page 7.

Sub-section

See *Section* on page 14.

System Administrator

The person who sets up and manages an application. They may be responsible for setting up and managing each Repository, and for ensuring users have the required software required to the application.

See also *Administrator* on page 5.

T

Tag
See Tag Name (below).

Tag Name
The name assigned to a Tagged Text Block by an IStream Author user. It cannot be changed in IStream Customizer.

Tag View
A list of all of the Tag Names, or tags, and Wording Names that appear in the document.

Tagged Text Block
A block of text placed between a `TEXT TAG NAME…` `ENDTEXT` rule in IStream Author.

Template
A type of Word document (a .DOT file) that contains specific paragraph styles and page layout information. You use templates when creating a Master Section or Section.

Termination Date
A date that indicates when a section or custom wording will no longer be included in a document. Termination Dates are used with Effective Dates to specify a date range.

In IStream Author, the Termination Date determines which Sections should no longer be included in an IStream Document.

The Termination Date is also the end date of a Custom Wording. It instructs IStream Assembler when to stop including the Customization in the document.

Termination Dates (and Effective Dates) also appear in the Model Document Outline.

TEXT…ENDTEXT Rule
Instructs IStream Document Manager to treat all text and formatting codes that appear between `TEXT …` `ENDTEXT` as literal text, and to insert it into a document.

Toolkit
See *IStream Toolkit* on page 11.

Tracker
An application that automates the product development and state filing processes. Tracker allows you to manage filings in a centralized repository and has access to a comprehensive regulatory filing knowledge base. It includes many types of reports to view filings, rates, rules, forms or advertisements and monitor productivity. You can also record and monitor a filing's history through customizable activities.

You can integrate Tracker with IStream Document Manager.

Tree
The listing of all the available elements or items within a module.

U

UISR
A Universal Information Source Reference. It is a reference to an InfoSource and a specific file in that InfoSource. A UISR includes an InfoSource name, path, and filename. IStream Author Reference Wizard helps you build UISRs for the InfoSources you want to access.

User Database InfoSource
User databases are associated with a mapping which define a set of hard-coded SQL queries to a user database. IStream assumes that user databases are created and managed with the help of an appropriate Data Base Management System (DBMS) or Relational Data Base Management Systems (RDBMS). Access to user databases and lookup tables is provided through ODBC drivers. Lookup tables can be considered as a particular case of a database table.

V

Variable
The data element in a Model Document that is specific to each generated IStream Document, such as the recipient's name and address. The Key Data determines the content of a variable when an IStream Document is generated. After the document is generated, the variables are automatically filled in with the correct information. See also *Business Variable* on page 6.

Visualizer
See *IStream Visualizer* on page 11.

W

Wording Name
The name assigned to a Custom Wording.

Wording Properties
The characteristics of a wording such as Effective Date, Termination Date, and Customization Mode.

Workflow
The process which automates your business processes by creating specific roles, rules and business maps.

Writer
See *IStream Writer* on page 11.

X

XML
e**X**tensible **M**arkup **L**anguage: a general-purpose markup language that uses customizable tags to define data elements.

XML InfoSource
See *IStreamXML InfoSource* on page 11.

IStream Document Manager Documentation

IStream Document Manager includes the following documents and online help files:

General Documentation

- The *IStream Document Manager Release Notes* include general product information, product enhancements and new features, supported platforms and third-party software, assorted considerations, and known issues and limitations.
- The *IStream Document Manager ReadMe* file describes the contents of the installation package.
- The *IStream Document Manager Glossary* contains definitions of commonly used IStream terms.

User Guides and Online Help

- The *IStream Assembler Online Help* describes how to generate documents from sections and model documents.
- The *IStream Assembler Add-in for Microsoft Word Online Help* describes how to perform certain IStream Assembler functions directly within Microsoft Word.
- The *IStream Author User Guide* describes how to create, edit, and test sections or model documents.
- The *IStream Author Add-in for Microsoft Word Online Help* describes how to perform certain IStream Author functions directly within Microsoft Word.
- The *IStream Customizer User Guide* describes how to modify the content of generated documents so that the changes will be applied during subsequent document generations.
- The *IStream Document Manager DMS Guide for IStream and Model Documents* describes how to edit and work with IStream sections and model documents using the DMS user interface.
- The *DMS Plug-in for Author Online Help* describes how to access DMS functionality in IStream Author.
- The *IStream InfoConnector Online Help* describes how to set up and configure IStream InfoSources.

Advanced Guides

- The *IStream Document Manager Guide for New Installations* explains how to complete a new installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.

- The *IStream Document Manager Upgrade Installation Guide* explains how to upgrade an *existing* installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.
- The *IStream Document Manager Message Reference Guide* contains lists of error, log and SDK messages from the various IStream components. It is for technical users who need additional information about the various IStream messages they receive.
- The *IStream Document Manager Technical Guide* is for system administrators and technical support staff who configure IStream Document Manager and set up links between it and their company's database. This guide is also for those who set up and maintain security groups and operators in the system, and who install, optimize, maintain and troubleshoot IStream Document Manager. It also describes installing and configuring IStream XML InfoSources for interactive and batch generation.
- The *IStream Assembler* and *Extensibility Toolkit Guides* contain detailed descriptions of the components in the IStream Toolkit, or SDK. They are for technical users who need to integrate IStream components with their own or other third party applications.

  In addition to the toolkit guides, the *IStream Toolkit SDK Samples Guide* gives an overview of the toolkit samples. The samples are working examples that can help you develop custom applications.

  For more information about the toolkit, see the *IStream Document Manager Toolkit ReadMe.*