ORACLE
INSURANCE

## Oracle Insurance

# Insbridge Rating and Underwriting

# ESI for Java User Guide

Release 4.1

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Oracle Insurance Insbridge Rating and Underwriting ESI for Java User Guide

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# PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting ESI for Java Guide*. This guide describes how you can configure and use the Insbridge Extended Services Interface (ESI).

## AUDIENCE

This guide is intended for application developers, programmers and others tasked with configuring the ESI interface. Users should be familiar with Java IDE.

## RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Insbridge Rating and Underwriting RateManager User Guide.
- The Oracle Insurance Insbridge Rating and Underwriting Javadoc File.
- The Oracle Insurance Insbridge Rating and Underwriting Framework Administrator User Guide.
- You can view these guides in-line at this address:

  http://www.oracle.com/technology/documentation/insurance.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.

Oracle Insurance recommends the following system requirements for client workstations for optimal performance. Currently, Insbridge ESI only supports US English.

***Insbridge ESI Clients:***

- Operating System – Windows XP Professional (with service pack 1a or later), or Windows 7
- JDK 6

## Manual History

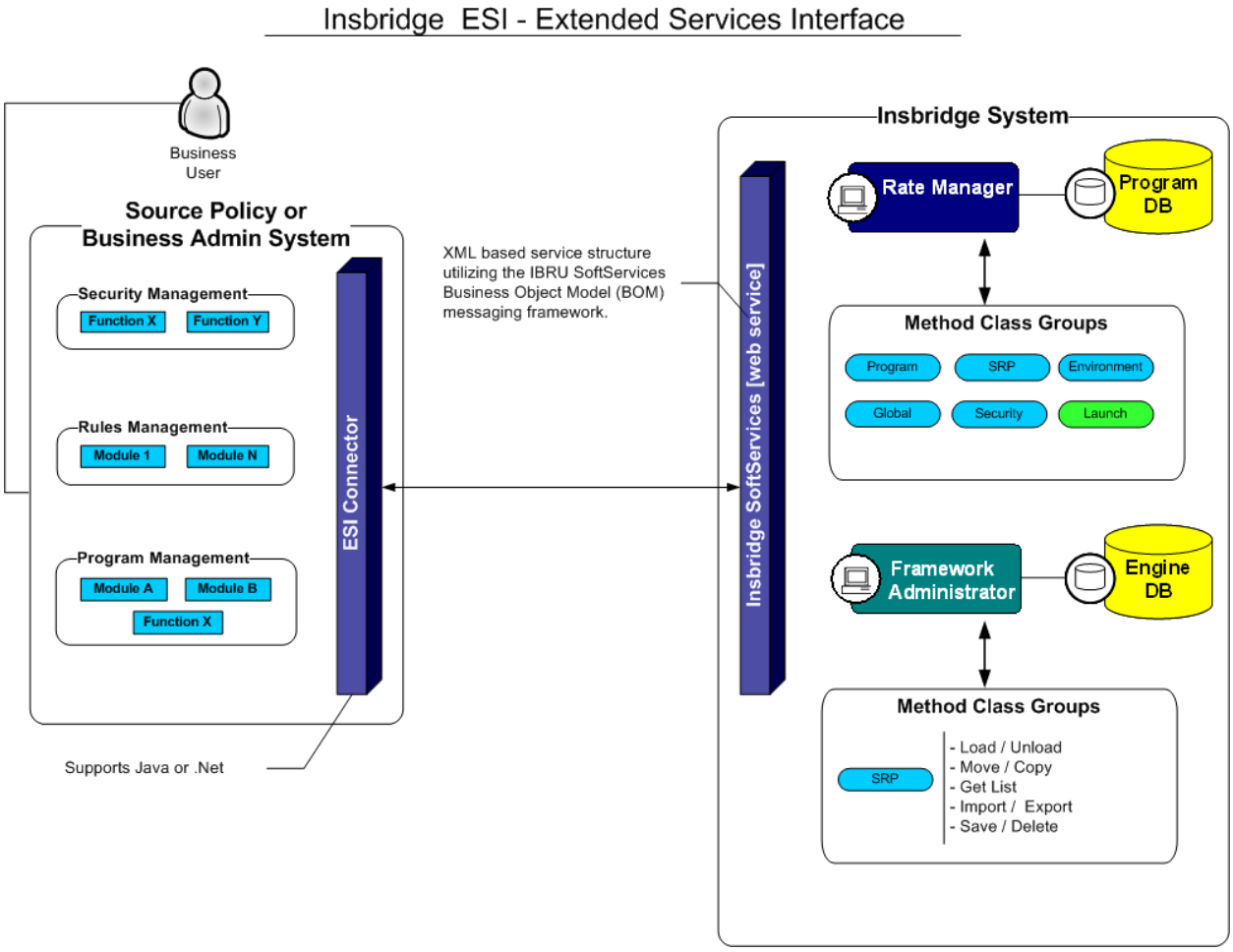
New editions incorporate any updates issued since the previous edition.

| Edition | Publication Number | Product Version | Publication Date | Comment |
|---|---|---|---|---|
| 1st Edition | P01-783-01 | R 4.1 | December 2010 | Initial release |

Chapter 1

# INTRODUCTION TO INSBRIDGE EXTENDED SERVICES INTERFACE

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




ESI allows users to pass information between a user's source policy or business admin system and the RateManager system or the Insbridge Framework Administrator (IBFA) without using either the RateManager or IBFA UI. ESI itself is not a web service. You will reference it in your applications and **consume it natively**. ESI then calls the web services in RateManager or IBFA. Both RateManager and IBFA have a web service interface that ESI can call.

ESI is designed to operate on Insbridge version 4.01.0 or higher and will connect with:

- Oracle Insurance IBRU RateManager Interface
- Oracle Insurance Framework Administrator Interface

For example, if you had a vendor Policy Administration system and wanted to provide integrated product management through your custom solution; ESI would allow you to model and use the workflow o the IBRU business services and functions but control all the user presentation aspects through your custom product interface.

### Rule and Functionality Highlights

- ESI is available on Insbridge Rating and Underwriting version 4.01.0 or higher.
- ESI will be shipped with the IBFA installation. To locate ESI, look under the Insbridge directory for the SDK/ESI/Java file; [INSTALL_DIR]\Insbridge\SDK\ESI\Java. This file will contain two items:
  - InsbridgeEsiServices.jar
  - EsiSwingTester.cmd
  - EsiSwingTester.jar
  - EsiSwingTester Source Code.zip
  - Javadoc.zip
- ESI entries are immediate. There is no lag time or system sync required.
- An ESI cannot be recalled or undone. If an ESI needs to be edited, for example a folder has an incorrect name; you must enter RateManager or IBFA and make the changes there.
- ESI works with the default subline in the folder of your choice for any line of business.
- Unless specifically stated as Optional, all Inputs are **Required**.

**NOTE:** *For further details, please see the Javadoc file.*

Chapter 2

# BASE DOMAIN TYPES

Base ESI domain types represent the business nouns with in the Insbridge system. These data structures represent the majority of the business payload.

Please see the Javadoc for details.

# USE CASE SUMMARY

The following table is a quick guide to the function available for ESI.

| Business Use Case | Methods to Use | Result |
|---|---|---|
| | | |
| **General – Open URL** | | |
| Create Launch Definition – using a Network login | General – createLauchDefinition (Selected Version, Network Login) | Method will return a URL for a selected program version using a network login. |
| Create Launch Definition – using a Network login | General – createLauchDefinition (First Version, Network Login) | Method will return a URL for the first program version using a network login. |
| Create Launch Definition – using a RateManager login | General – createLauchDefinition (Selected Version, RateManager Login) | Method will return a URL for a selected program version using a RateManager login. |
| Create Launch Definition – using a RateManager login | General – createLauchDefinition (First Version, RateManager Login) | Method will return a URL for the first program version using a RateManager login. |
| | | |
| **Programs** | | |
| Add | Program Items – createProgram | Create a new program. |
| Add New Version | Program Items – createProgramVersion | Creates a new version of an existing program. |
| Copy a Program | Program Items – copyProgram | Copies an existing Insbridge program. |
| Delete | Program Items – deleteProgram | Removes a program. |
| Update | Program Items – updateProgram | Updates a program. |
| Update | Program Items – updateProgramVersionLock | Updates a program version lock. |
| | | |

| | | |
|---|---|---|
| **Folder Groups** | | |
| Add | Program Items – createFolder | Creates a new folder. |
| Delete | Program Items – deleteFolder | Removes a folder. |
| List Folders | Program Items – getFoldersXML | Returns an XML string of all available folders in an LOB. |
| Update | Program Items – updateFolder | Updates the name or location of a folder. |
| **Line of Business** | | |
| Add | Program Items – createLine | Creates a new Line. |
| Delete | Program Items – deleteLine | Removes an Line. |
| Update | Program Items – updateLine | Updates an Line. |
| | | |
| **SRP – RateManager** | | |
| Add | SRP Items – createSRP | Creates an SRP and returns the SRP object. |
| | | |
| **Global Items** | | |
| Add | Global Items – createInput | Creates a new input. |
| Add | Global Items – createCategory | Creates a new category. |
| Add | Global Items – createCategory with Inputs | Creates a new category with inputs. |
| Delete | Global Items – deleteInput | Removes an input. |
| Delete | Global Items – deleteCategory | Removes a category. |
| Updates | Global Items – updateInput | Updates a category. |
| Updates | Global Items – updateCategory | Updates an input. |
| List Inputs | Global Items – getInputsArray | Returns an array of all inputs in a Line. |
| List Inputs | Global Items – getCategoryXML | Returns an XML string of all categories in a Line. |
| | | |
| **Security Items** | | |
| Add | Security Items – createUser | Creates a new user. |
| List | Security Items – getUsers | Returns a list of all avaialable users for the subscriber. |
| List | Security Items – getUserGroups | Returns a list of all avaialable user groups. |
| Login | Security Items – login | Logs in the user. |

| | | |
|---|---|---|
| Login | Security Items – networkLogin | Logs in the user with network login. |
| Logout | Security Items – logout | Logs out the user. |
| Update | Security Items – updateUser | Updates a user's information. |
| | | |
| **Environment Items** | | |
| List | Environment Items – getAvailableEnvironments, All Non-Secured | Returns a list of all available non-secured environments. |
| List | Environment Items – getAvailableEnvironments, Secured | Returns a list of all available environments within a selected environment type. |
| | | |
| **Releases** | | |
| Add | Releases Items – createRelease | Creates a new release. |
| Delete | Releases Items – deleteRelease | Removes a release. |
| List | Releases Items – getReleasePrograms | Returns a list of all programs in release. |
| Update | Releases Items – addReleaseProgram | Add a program version to a release. |
| Delete | Releases Items – removeReleaseProgram | Removes a program from the release. |

| Business Use Case | Methods to Use | Result |
|---|---|---|
| | | |
| **SRP– IBFA** | | |
| Copy | SRP Items – copySRP | Copies an SRP from the current environment into a selected environment. |
| Delete | SRP Items – deleteSRP | Deletes an SRP from the disk. |
| Export | SRP Items – exportSRP | Exports an SRP from IBFA and converts it to bytes. |
| Import | SRP Items – importSRP | Imports SRP bytes into an IBFA environment. |
| List | SRP Items – getSRPList | Returns a list of all SRPs in a select environment. |
| List | SRP Items – getBytesFromFile | Returns the bytes from a file. |
| Load | SRP Items – loadSRP | Loads an SRP into an IBFA environment. |
| Move | SRP Items – moveSRP | Moves an SRP from the current environment to the passed environment |
| Save | SRP Items – saveFile | Saves the bytes you pass into a physical file. |
| Unload | SRP Items – unloadSRP | Unloads an SRP from a selected environment. |

# RATEMANAGER INTERFACE

**Constructor Detail**

## EsiRateManager

```
public EsiRateManager(int aSubscriber)
               throws java.lang.Exception
```

Constructor for EsiRateManager using LOCALHOST as the target server

**Parameters:**
`aSubscriber` - the licensed subscriber ID

**Throws:**
`java.lang.Exception`

---

## EsiRateManager

```
public EsiRateManager(int aSubscriber,
                      java.lang.String aTargetServer)
               throws java.lang.Exception
```

Constructor for EsiRateManager

**Parameters:**
`aSubscriber` - the licensed subscriber ID
`aTargetServer` - target server name or IP address

**Throws:**
`java.lang.Exception`

## Environment Items – getAvailableEnvironments, All Non-Secured

**Business Functionality**
- Gets all the available non-secured environments.
- This ESI interfaces provides the ability for an external system to programmatically retrieve meta-data about all the available non-secured Environments in order for the system to programmatically invoke the other ESI deployment related API's.

**Inputs**
- No inputs

**Outputs**
- List of all non-secured EsiEnvironment objects.

## Environment Items – getAvailableEnvironments, Secured

**Business Functionality**
- Gets all the available environments for a particular environment type.
- This ESI interfaces provides the ability for an external system to programmatically retrieve meta-data about the available Environments in order for the system to programmatically invoke the other ESI deployment related API's and pass in the correct environment data object.

**Inputs**
- aType – the environment type
- isIncludeSecure – Include Secured or Not

**Outputs**
- List of ESIEnvironment objects.

## General – createLauchDefinition (Selected Version, Network Login)

**Business Functionality**
- Method creates a URL of an existing program version. This method uses the Network login for authentication. Requires custom authentication setup in RateManager Security. See Authentication.

**Inputs**
- aLine – Line ID
- aProgram – Program ID
- aProgramVersion – Program Version

**Outputs**
- Returns a URL string to launch a Program.

## General – createLauchDefinition (First Version, Network Login)

**Business Functionality**
- Method creates a URL of the first program version. This method uses the Network login for authentication. Requires custom authentication setup in RateManager Security. See Authentication.

**Inputs**
- aLine – Line ID
- aProgram – Program ID

**Outputs**
- Returns a URL string to launch a Program.

## General – createLauchDefinition (Selected Version, RateManager Login)

**Business Functionality**
- Method creates a URL of an existing program version. This method uses the standard RateManager login for authentication.

**Inputs**
- aUser – non-network user ID
- aLine – Line ID

- aProgram – Program ID
- aProgramVersion – Program Version

**Outputs**

- Returns a URL string to launch a Program.

## General – createLauchDefinition (First Version, RateManager Login)

**Business Functionality**

- Method creates a URL of the first program version. This method uses the standard RateManager login for authentication.

**Inputs**

- aUser – non-network user ID
- aLine – Line ID
- aProgram – Program ID

**Outputs**

- Returns a URL string to launch a Program.

## Global Items – createInput

**Business Functionality**

- Creates a new global level input in a particular Line.

**Inputs**

- EsiInput

**Outputs**

- Returns the ID of the newly created Input if succeeded or exception if failed.

## Global Items – updateInput

**Business Functionality**

- Updates a global level input in a particular Line.

**Inputs**

- EsiInput

**Outputs**

- True if successful or false if failed.

## Global Items – deleteInput

**Business Functionality**

- Deletes a global level input in a particular Line.

**Inputs**

- EsiInput

**Outputs**

- True if successful or false if failed.

## Global Items – getInputsArray

**Business Functionality**
- Lists all the inputs of a particular Line.

**Inputs**
- EsiInput

**Outputs**
- Returns an array of EsiInputs that includes all the inputs of that Line.

## Global Items – createCategory

**Business Functionality**
- Creates a category in a particular Line.

**Inputs**
- EsiCreateCategory

**Outputs**
- Returns the ID of the newly created Category if succeeded or exception if failed.

## Global Items – createCategory with Inputs

**Business Functionality**
- Creates a category with inputs in a particular Line.

**Inputs**
- EsiCategory
- List of EsiInput objects

**Outputs**
- No outputs.

## Global Items – getCategoryXML

**Business Functionality**
- Gets an XML string of all the categories in a particular Line.

**Inputs**
- getCategoryXML

**Outputs**
- Return an XML string.

## Global Items – updateCategory

**Business Functionality**
- Updates a category in a particular Line.

**Inputs**
- EsiCategory

**Outputs**
- True if successful exception if failed.

## Global Items – deleteCategory

**Business Functionality**
- Deletes a category in a particular Line.

**Inputs**
- EsiCategory

**Outputs**
- True if successful exception if failed.

## Program Items – createLine

**Business Functionality**
- Creates a new line of business. The line of business, if activated, will be displayed on the RateManager navigation bar immediately. In order for any users to use the new line, groups must have access privileges granted.

**Inputs**
- EsiLine

**Outputs**
- Returns the ID of the newly created Line if succeeded or -1 if failed.

## Program Items – updateLine

**Business Functionality**
- Updates a line of business.

**Inputs**
- EsiLine

**Outputs**
- True if successful or exception if failed.

## Program Items – deleteLine

**Business Functionality**
- Deletes a line of business.

**Inputs**
- EsiLine

**Outputs**
- True if successful or exception if failed.

## Program Items – createFolder

**Business Functionality**
- Creates a new folder in a particular Line.

**Inputs**
- EsiFolder

**Outputs**
- Returns an EsiFolder object.

## Program Items – updateFolder

**Business Functionality**
- Updates the name or parent of an existing program folder. When you change the parent of any folder, the folders underneath will be changed as well.

**Inputs**
- EsiFolder

**Outputs**
- Returns the updated Folder ID if succeeded or exception if failed.

## Program Items – deleteFolder

**Business Functionality**
- Deletes an existing program folder. Make absolutely sure that the programs for the folder are no longer needed. Deleting a folder deletes all programs under that folder only. Subfolders and any programs in the subfolders will not be deleted but will now be unlinked.

**Inputs**
- EsiFolder

**Outputs**
- Returns True if succeeded or exception if failed.

## Program Items – getFoldersXML

**Business Functionality**
- Gets an XML string of available Folders of a particular Line.

**Inputs**
- getFoldersXML

**Outputs**
- Returns an XML string of available Folders of a specific Line.

## Program Items – createProgram

**Business Functionality**
- Creates a new Insbridge Program in the folder of your choosing.

**Inputs**
- EsiProgram

**Outputs**
- EsiProgram object.

## Program Items – updateProgram

**Business Functionality**
- Updates a Program in the folder of your choosing.

**Inputs**
- EsiProgram

**Outputs**
- True if successful or exception if failed.

## Program Items – deleteProgram

**Business Functionality**
- Deletes an existing Insbridge Program. When a program is deleted, all data (variables, algorithms, sequencing, result groups and, if an auto program, driver assignment scenarios) and versions are deleted. Make sure this is the action you want to take. Locked programs cannot be deleted and will return a fail.

**Inputs**
- EsiProgram

**Outputs**
- True if successful or exception if failed.

## Program Items – createProgramVersion

**Business Functionality**
- Creates a new version of an existing program.

**Inputs**
- EsiProgramVersion

**Outputs**
- Returns an EsiProgramVersion object.

## Program Items – copyProgram

**Business Functionality**
- Copies an existing Insbridge program version to a new specified program version with the option to copy the definition only or copy the definition and all data.
  - **Copy Definitions Only:** This option will copy all elements of the program with the exception of the data contained in mapped variables.
  - **Copy Definitions & All Data:** This option will copy all elements of the program, including the data contained in mapped variables.

**Inputs**
- New Program Version
- Source Program Version
- Copy Option

**Outputs**
- Returns an EsiProgram object.

## Program Items – updateProgramVersionLock

**Business Functionality**
- Locks or unlocks a program version.

**Inputs**
- EsiProgramVersion
- aLockOption

**Outputs**
- True if successful or exception if failed.

## Releases Items – createRelease

**Business Functionality**
- Creates a new Release.

**Inputs**
- aReleaseName – the release name
- aReleaseDescription – the release description
- aReleaseNotes – The release notes
- aAdminEmail – the release admin email
- aTargetEnvironment – the environment

**Outputs**
- EsiRelease object.

## Releases Items – deleteRelease

**Business Functionality**
- Deletes an existing release.

**Inputs**
- aTargetRelease – the release being deleted

**Outputs**
- True if successful or exception if failed.

## Releases Items – addReleaseProgram

**Business Functionality**
- Add a program version to a Release.

**Inputs**
- aTargetRelease – the release the program version is being added to
- aTargetProgramVersion – the program version that is being added

**Outputs**
- True if successful or exception if failed.

## Releases Items – removeReleaseProgram

**Business Functionality**

- Removes a program version from a Release.

**Inputs**

- aTargetRelease – the release the program version is being removed from
- aTargetProgramVersion – the program version that is being removed

**Outputs**

- True if successful or exception if failed.

## Releases Items – getReleasePrograms

**Business Functionality**

- Lists the programs in a Release.

**Inputs**

- aTargetRelease – the EsiRelease object being retrieved

**Outputs**

- The EsiRelease object including the programs contained.

## Security Items – login

**Business Functionality**

- Logs a User in to the RateManager System.

**Inputs**

- none

**Outputs**

- none

## Security Items – networkLogin

**Business Functionality**

- Logs a User in to the RateManager System using a Windows login.

**Inputs**

- none

**Outputs**

- none

## Security Items – logout

**Business Functionality**

- Logs a User out of the RateManager System.

**Inputs**

- none

**Outputs**

- none

## Security Items – createUser

**Business Functionality**
- Creates a new User.

**Inputs**
- EsiUser

**Outputs**
- Returns new user ID if successful or exception if failed.

## Security Items – updateUser

**Business Functionality**
- Updates an existing User. Password Reset must be done inside RM.

**Inputs**
- EsiUse

**Outputs**
- Returns True if succeeded or False if failed.

## Security Items – getUsers

**Business Functionality**
- Gets a list of all the available users for the subscriber.

**Inputs**
- No inputs

**Outputs**
- Returns a list of EsiUsers.

## Security Items – getUserGroups

**Business Functionality**
- Gets all the available user groups.

**Inputs**
- No inputs

**Outputs**
- Returns a list of EsiUserGroup.

## SRP Items – createSRP

**Business Functionality**
- Creates a SoftRater Package (SRP) in a particular environment.
- ESI created SRP will have an identifier “API” in the filename and will show an icon on IBFA SRP list.

**Inputs**
- aTargetProgram – the program the SRP to be created on
- aProgram Version – the program version the SRP to be created on

- aTargetEnvironmnet – the environment the SRP to be created on

**Outputs**

- Returns the newly created EsiSRP object.

# FRAMEWORK ADMINISTRATOR INTERFACE

**Constructor Detail**

## EsiFrameworkAdministrator

```
public EsiFrameworkAdministrator(java.lang.String aApplicationTokenKey,
                                 int aSubscriber)
                          throws java.lang.Exception
```

Constructor for FrameworkAdministrator using LOCALHOST as the target server

**Parameters:**
`aApplicationTokenKey` - the Secure token to validate ESI session
`aSubscriber` - the Licenced Subscriber ID

**Throws:**
`java.lang.Exception`

---

## EsiFrameworkAdministrator

```
public EsiFrameworkAdministrator(java.lang.String aApplicationTokenKey,
                                 int aSubscriber,
                                 java.lang.String aTargetServer)
                          throws java.lang.Exception
```

FrameworkAdministrator Constructor

**Parameters:**
`aApplicationTokenKey` - the Secure token to validate ESI session
`aSubscriber` - the Licenced Subscriber ID
`aTargetServer` - the Target server name or IP address

**Throws:**
`java.lang.Exception`

## SRP Items – copySRP

**Business Functionality**

- Copies an SRP from the current environment to the selected environment. To determine the current environment, run the GetSRPList. This will return a list of Esi_SRP's. Every Esi_SRP has the environment and other information. CopySRP will get the current environment from the Esi_SRP object that you pass in.

**Inputs**

- aTargetEnvironment – The environment the SRP to be copied to.
- aTargetSRP – The SRP to be copied.

**Outputs**

- True if succeeded or exception if failed.

## SRP Items – deleteSRP

**Business Functionality**

- Deletes an SRP from disk. To determine (or control) the environment that the SRP is deleted from, run the GetSRPList to get the Esi_SRP's. Every Esi_SRP has the environment and other information. This will tell you which environment the SRP is currently in.
- Once deleted, this package cannot be reloaded.

**Inputs**

- aTargetSRP – The SRP to be deleted

**Outputs**

- True if succeeded or exception if failed

## SRP Items – exportSRP

**Business Functionality**

- Exports an SRP from an IBFA environment and converts it to bytes.
- You can use the bytes directly or save them to a physical file by using SaveFile() method.
- To use the SRP bytes, use a straight binary read into a byte array.

```
FileStream fs = File.OpenRead(@"C:\TEMP\abc.srp");
byte[] srpBytes = new byte[fs.Length];
fs.Read(srpBytes, 0, srpBytes.Length);
```

**Inputs**

- aTargetSRP – The SRP to be exported

**Outputs**

- The bytes of the SRP

## SRP Items – getSRPList

**Business Functionality**

- Gets a list of all SRPs in a particular environment.

**Inputs**

- aTargetEnvironment – The environment from where the SRPs are to be retrieved.
- aSRPType – theSRP type, 0=all SRPs; 1=ESI created SRPs

**Outputs**

- A list of EsiSRP objects.

## SRP Items – getBytesFromFile

**Business Functionality**

- Gets the bytes from the file you pass in.

**Inputs**
- aFile – the file to get bytes from.

**Outputs**
- The bytes of the file.

## SRP Items – importSRP

**Business Functionality**
- Imports SRP bytes into an IBFA environment.

**Inputs**
- aTargetEnviroment – The environment the SRP is to be imported into
- aSRPBytes – The SRP bytes to be imported

**Outputs**
- True if succeeded or exception if failed

## SRP Items – loadSRP

**Business Functionality**
- Loads an SRP into an IBFA environment so that the rating algorithms can be executed against it.
- Loading a package takes the logic stored in the package and places it in the database so it can be executed.
- Packages should be able to be loaded within an ESI Environment.

**Inputs**
- aTargetEnvironment – The environment the SRP is to be loaded in.
- aTargetSRP – The SRP to be loaded.

**Outputs**
- True if succeeded or exception if failed.

## SRP Items – moveSRP

**Business Functionality**
- Given an Esi_SRP object as well as an ESI Environment, the API moves the SRP from the current environment to the passed-in environment.

**Inputs**
- aTargetEnvironment – The environment the SRP is to be moved to.
- aTargetSRP – The SRP to be moved.

**Outputs**
- True if succeeded or exception if failed.

## SRP Items – saveFile

**Business Functionality**
- Saves the bytes you pass in to a physical file.

**Inputs**

- aData – The bytes to be saved
- aPath – The location and name the bytes are to be saved

**Outputs**

- True if succeeded or exception if failed

## SRP Items – unloadSRP

**Business Functionality**

- Unloads an SRP from a particular Environment. To determine (or control) the environment that the SRP is unloaded from, run the GetSRPList to get the Esi_SRP's. Every Esi_SRP has the environment and other information. This will tell you which environment the SRP is currently in.
- The package itself remains on disk until deleted. It is not necessary to unload a package before loading another package for the same program and version.
- If a package is loaded for a program and version that already has a package loaded, the old package will be unloaded before the new package is loaded.

**Inputs**

- aTargetSRP – The SRP to be unloaded.

**Outputs**

- True if succeed or exception if failed.

Chapter 5

# ESI USER SETUP AND AUTHENTICATION

There are two types of authentication in ESI RateManager Interface:

- **Regular login** – users will send down a valid RateManager username and ESI will log the user in with that.
- **Network login** – ESI will get your windows credentials and log you in with the same username and password as the user you login to windows

You will need to set up a network user account if you want to use windows integrated login in RateManager.

## Adding a User

New users can be added from the User Management screen. All new users will be assigned the default password, password. New users should log in as soon as possible and change their password.

### To Add a New User

1. In RateManager, Tools→Security→**User Management**.

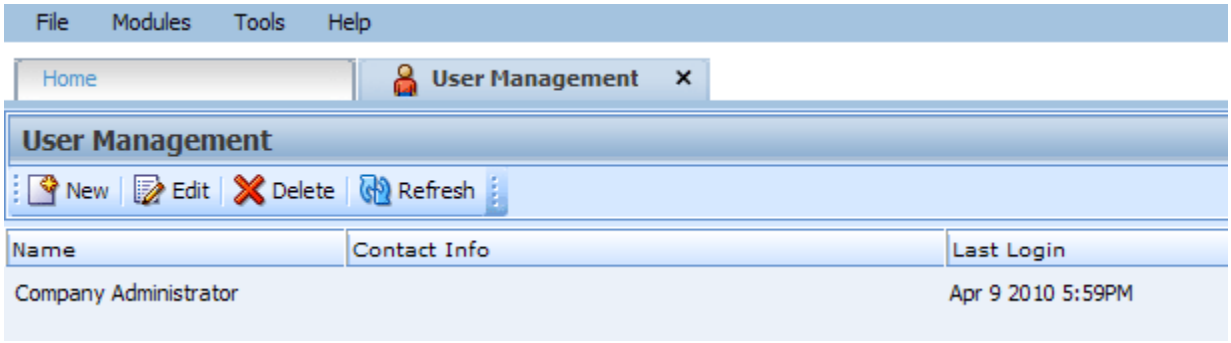



*Figure 1 Adding a New User*

2. Click **NEW** to open the Add User screen.

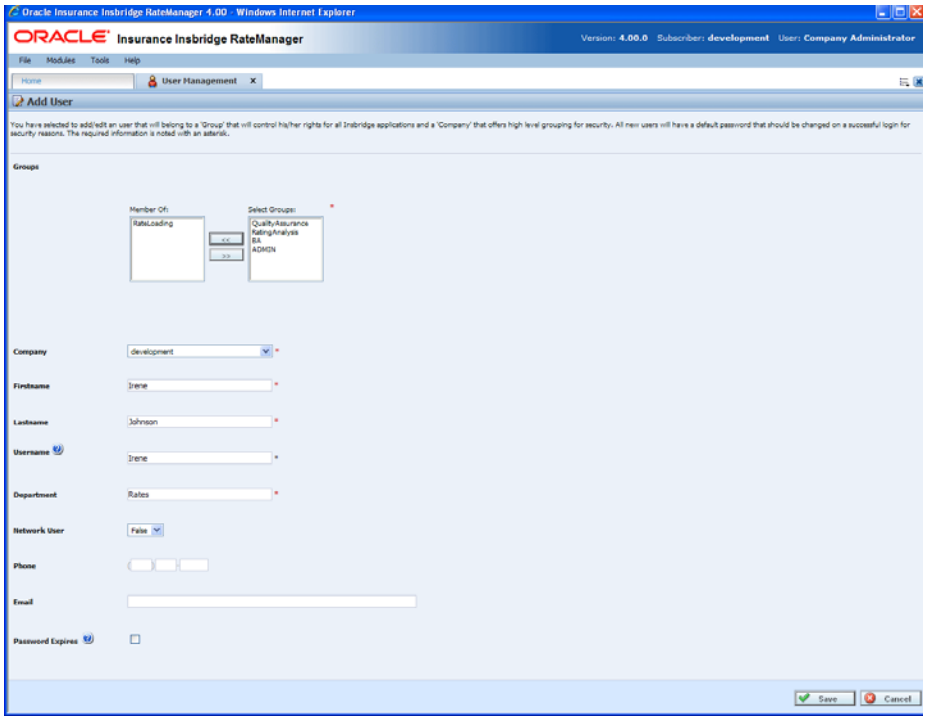



*Figure 2 User Management Screen*

3. Select the **Group**(s) the new user will belong to by selecting a group or groups from the Select Groups list and then clicking the << button.

4. Select the **Company** the user will belong to from the drop down listing.

5. Enter a **First** and **Last** name for the user in the appropriate text boxes.

6. Enter a **Username** for the new user. The username must be at least six, but fewer than twelve, alphanumeric characters and can include an underscore (_) or period (.).

7. Enter a **Department** for the user.

8. Select whether the new user is a **Network User** by selecting **True** or **False** from the drop down. If you select **True,** the user's credentials (username and password) will be validated using Windows Authentication Tokens. The username must match the network user ID. If you select **False,** the user must enter a valid username and password via the RateManager login screen.

9. Optionally, enter a **Phone Number** and **Email Address** for the new user.

10. If you want the user's password to expire, click the box next to **Password Expires**. The Preferences screen will contain the number of days required for a password change.

11. When you are finished, click **SAVE**. The user will be added to the system and the user list will be updated. The new user can now log in using the username you assigned them and the default password, **password**.

12. The user should change their password the first time they log in. See Changing Your Password for more information.

# ESI SYSTEM CONFIGURATION

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

When IBFA is installed, a default API key will be generated and saved in IBFA. You can find it in *IBFA→Insbridge→Security→External API Access*. You can disable ESI's IBFA functionality by setting it to "Disabled". For security purpose, you may want to change the key once in a while. To change the key, click on "Generate Key" and then click on "Update". Every key generated will be unique.

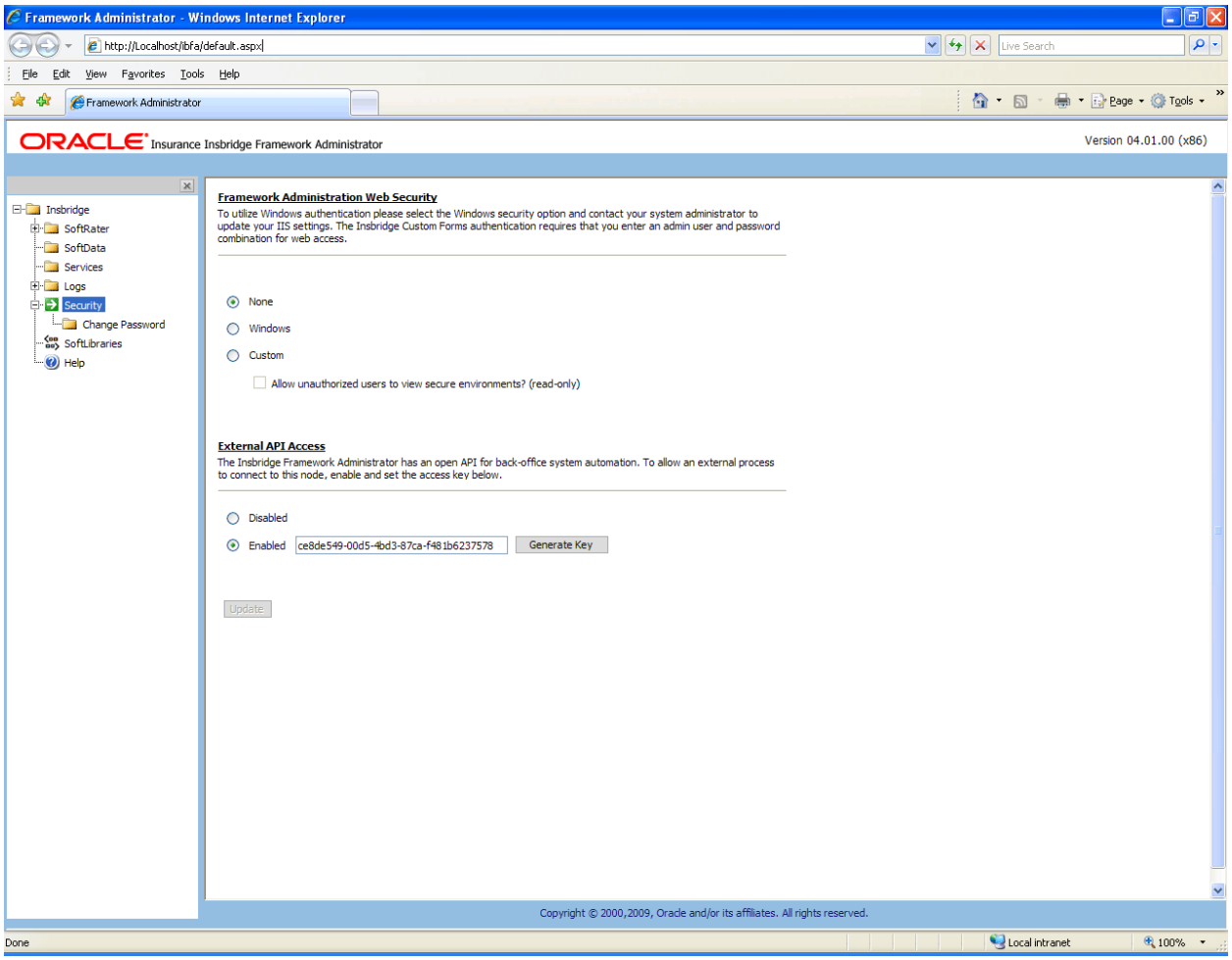



*Figure 3 Allowing External API Access*

# CONTACTING SUPPORT

If you need assistance with an Oracle Insurance Insbridge Rating and Underwriting System product, please log a Service Request using My Oracle Support at https://support.oracle.com/.

**Address any additional inquiries to:**

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Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
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