

Oracle Insurance

**Insbridge Rating and
Underwriting**

**ESI for Windows User
Guide**

Release 4.5

May 2011

Copyright © 2005, 2011, Oracle and/or its affiliates. All rights reserved.

Oracle Insurance Insbridge Rating and Underwriting ESI User Guide

Release 4.5

Part # E22942-01

Library # E22944-01

May 2011

Primary Authors: Mary Elizabeth Wiger

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Where an Oracle offering includes third party content or software, we may be required to include related notices. For information on third party notices and the software and related documentation in connection with which they need to be included, please contact the attorney from the Development and Strategic Initiatives Legal Group that supports the development team for the Oracle offering. Contact information can be found on the Attorney Contact Chart.

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your beta trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Software License and Service Agreement, which has been executed and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

CONTENTS

| | | |
|------------------|--|----|
| | PREFACE | V |
| | Audience | v |
| | Related Documents | v |
| | Conventions | v |
| | System Requirements..... | vi |
| | Manual History | vi |
| CHAPTER 1 | | |
| | INTRODUCTION TO INSBRIDGE EXTENDED SERVICES INTERFACE | 7 |
| CHAPTER 2 | | |
| | BASE DOMAIN TYPES | 9 |
| | Use Case Summary..... | 10 |
| CHAPTER 3 | | |
| | RATEMANAGER INTERFACE..... | 13 |
| | Environment Items – GetAvailableEnvironments, All Non-Secured | 13 |
| | Environment Items – GetAvailableEnvironments, Secured..... | 13 |
| | General – CreateLauchDefinition (Selected Version, Network Login)..... | 14 |
| | General – CreateLauchDefinition (First Version, Network Login)..... | 14 |
| | General – CreateLauchDefinition (Selected Version, RateManager Login)..... | 14 |
| | General – CreateLauchDefinition (First Version, RateManager Login)..... | 14 |
| | Global Items – CreateCategory | 15 |
| | Global Items – CreateCategory with Inputs | 15 |
| | Global Items – CreateCategoriesFromXML..... | 15 |
| | Global Items – CreateInput..... | 15 |
| | Global Items – DeleteCategory..... | 16 |
| | Global Items – DeleteInput | 16 |
| | Global Items – GetCategoryXML | 16 |
| | Global Items – GetInputsXML..... | 16 |
| | Global Items – UpdateCategory..... | 16 |
| | Global Items – UpdateInput | 17 |
| | Program Items – CopyProgramVersion | 17 |
| | Program Items – CreateFolderGroup | 17 |
| | Program Items – CreateLine..... | 17 |
| | Program Items – CreateProgram..... | 18 |
| | Program Items – CreateProgramVersion | 18 |
| | Program Items – DeleteFolderGroup..... | 18 |
| | Program Items – DeleteLOB..... | 18 |
| | Program Items – DeleteProgram | 19 |

| | |
|---|----|
| Program Items – GetAvailableFolderGroups..... | 19 |
| Program Items – GetAvailableFolderGroupsXML | 19 |
| Program Items – UpdateFolderGroup | 19 |
| Program Items – UpdateLOB..... | 20 |
| Program Items – UpdateProgram | 20 |
| Program Items – UpdateProgramVersionLock..... | 20 |
| Releases Items – CreateRelease | 20 |
| Releases Items – DeleteRelease..... | 21 |
| Releases Items – AddReleaseProgram..... | 21 |
| Releases Items – GetReleasePrograms | 21 |
| Releases Items – RemoveReleaseProgram..... | 21 |
| Security Items – CreateUser | 22 |
| Security Items – GetAvailableUsers | 22 |
| Security Items – GetAvailableUserGroups | 22 |
| Security Items – UpdateUser | 22 |
| SRP Items – CreateSRP | 22 |
| CHAPTER 4 | |
| FRAMEWORK ADMINISTRATOR INTERFACE..... | 24 |
| SRP Items – CopySRP | 24 |
| SRP Items – DeleteSRP | 24 |
| SRP Items – ExportSRP | 24 |
| SRP Items – GetSRPList, ESI Created Only..... | 25 |
| SRP Items – GetSRPList, Selected SRP Type | 25 |
| SRP Items – ImportSRP | 25 |
| SRP Items – LoadSRP | 25 |
| SRP Items – MoveSRP | 26 |
| SRP Items – SaveFile..... | 26 |
| SRP Items – UnloadSRP | 26 |
| CHAPTER 5 | |
| EXCEPTION ERRORS..... | 27 |
| CHAPTER 6 | |
| ESI USER SETUP AND AUTHENTICATION..... | 28 |
| Adding a User | 28 |
| CHAPTER 7 | |
| ESI SYSTEM CONFIGURATION | 30 |
| SUPPORT | |
| CONTACTING SUPPORT..... | 31 |
| TTY Access to Oracle Support Services | 31 |
| INDEX | |
| INDEX | 32 |

LIST OF FIGURES

FIGURE 1 ADDING A NEW USER..... 29
FIGURE 2 ALLOWING EXTERNAL API ACCESS..... 30

PREFACE

Welcome to the *Oracle Insurance Insbridge Rating and Underwriting ESI for Windows 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 Visual Studio.

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 EIS_Help 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/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. |
| <i>italic</i> | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
| <code>monospace</code> | 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 2000 Professional (with service pack 3 or later) or Window XP Professional (with service pack 1a or later)
- Microsoft .NET 3.5
- Microsoft Web Services Enhancements 3.0 for Microsoft .NET Framework

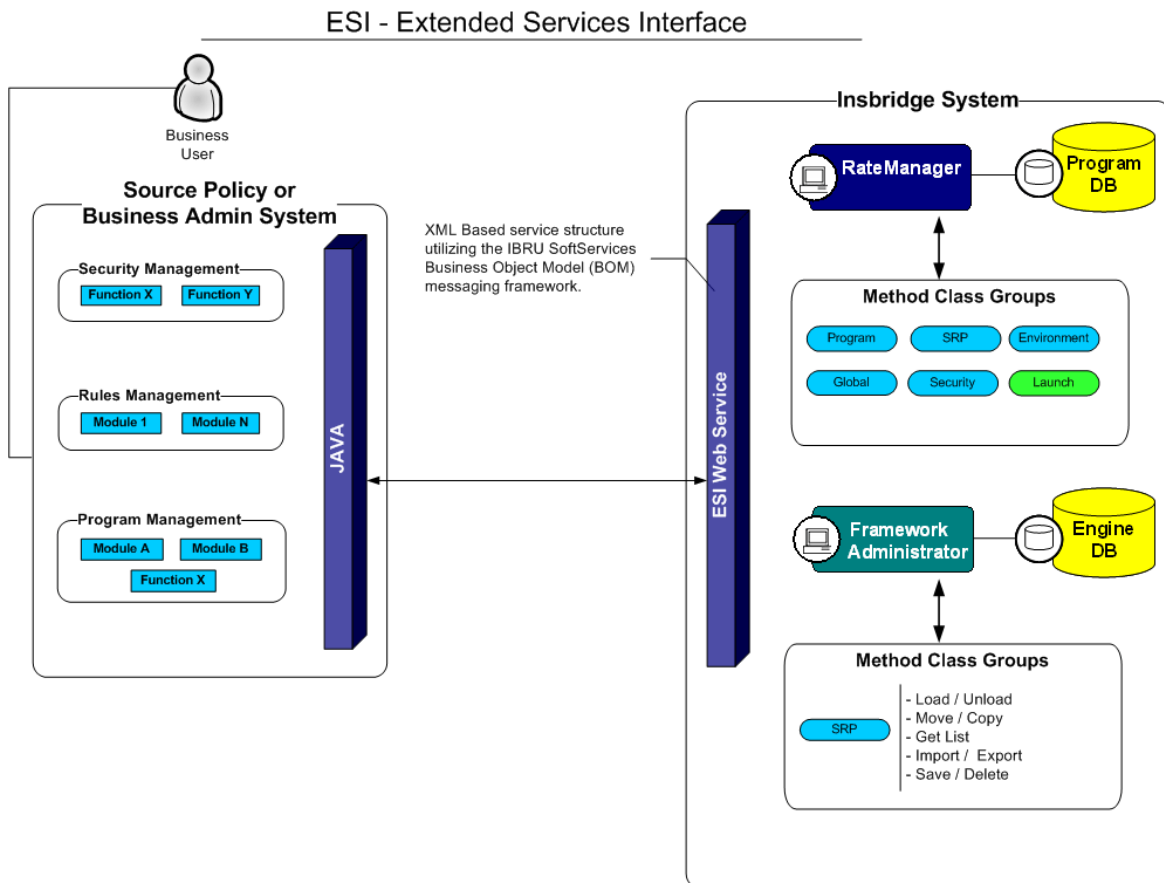
Manual History

New editions incorporate any updates issued since the previous edition.

| Edition | Publication Number | Product Version | Publication Date | Comment |
|-------------------------|---------------------------|------------------------|-------------------------|-----------------|
| 1 st Edition | P01-767-01 | V 3.11.01 | December 2008 | Initial release |
| 2 nd Edition | P01-767-02 | V 3.12.00 | July 2009 | Update Version |
| 3 rd Edition | P01-767-03 | V 3.13.00 | December 2009 | Update Version |
| 4 th Edition | P01-767-04 | R 4.0 | April 2010 | Update Release |
| 5 th Edition | P01-767-05 | R 4.0.1 | August 2010 | Update Release |
| 6 th Edition | P01-767-06 | R 4.1 | December 2010 | Update Release |
| 7 th Edition | P01-767-07 | R 4.5 | May 2011 | Update Release |

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 3.11 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 of 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 3.11 or higher.
- ESI will be loaded with the IBFA installation. To locate ESI, look under the Insbridge directory for the SDK/ESI file; [INSTALL_DIR]\Insbridge\SDK\ESI. This file will contain two items:
 - Insbridge.Net.Fwk.ESI.dll
 - ESI_Help.chm
- 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 *ESI_Help.chm* file.

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 ESI_Help.chm file 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 | <u>General – CreateLaunchDefinition (Selected Version, Network Login)</u> | Method will return a URL for a selected program version using a network login. |
| Create Launch Definition – using a Network login | <u>General – CreateLaunchDefinition (First Version, Network Login)</u> | Method will return a URL for the first program version using a network login. |
| Create Launch Definition – using a RateManager login | <u>General – CreateLaunchDefinition (Selected Version, RateManager Login)</u> | Method will return a URL for a selected program version using a RateManager login. |
| Create Launch Definition – using a RateManager login | <u>General – CreateLaunchDefinition (First Version, RateManager Login)</u> | Method will return a URL for the first program version using a RateManager login. |
| Programs | | |
| Add | <u>Program Items – CreateProgram</u> | Create a new program. |
| Add New Version | <u>Program Items – CreateProgramVersion</u> | Creates a new version of an existing program. |
| Copy a Program Version | <u>Program Items – CopyProgramVersion</u> | Copies an existing Inbridge program version to a new specified version. |
| Delete | <u>Program Items – DeleteProgram</u> | Removes a program. |
| Update | <u>Program Items – UpdateProgram</u> | Updates a program. |
| Update | <u>Program Items – UpdateProgramVersionLock</u> | Updates a program version lock. |

| Folder Groups | | |
|--------------------------|---|---|
| Add | <u>Program Items – CreateFolderGroup</u> | Creates a new folder. |
| Delete | <u>Program Items – DeleteFolderGroup</u> | Removes a folder. |
| List Folders | <u>Program Items – GetAvailableFolderGroups</u> | Returns a list of folders in an LOB. |
| List Folders | <u>Program Items – GetAvailableFolderGroupsXML</u> | Returns an XML string of all available folders in an LOB. |
| Update | <u>Program Items – UpdateFolderGroup</u> | Updates the name or location of a folder. |
| Line of Business | | |
| Add | <u>Program Items – CreateLine</u> | Creates a new LOB. |
| Delete | <u>Program Items – DeleteLOB</u> | Removes an Line. |
| Update | <u>Program Items – UpdateLOB</u> | Updates an LOB. |
| SRP – RateManager | | |
| Add | <u>SRP Items – CreateSRP</u> | Creates an SRP and returns the SRP object. |
| Global Items | | |
| Add | <u>Global Items – CreateInput</u> | Creates a new input. |
| Add | <u>Global Items – CreateCategory</u> | Creates a new category. |
| Add | <u>Global Items – CreateCategory with Inputs</u> | Creates a new category that includes inputs. |
| Add | <u>Global Items – CreateCategoriesFromXML</u> | Creates a new category using an XML string. |
| Delete | <u>Global Items – DeleteInput</u> | Removes an input. |
| Delete | <u>Global Items – DeleteCategory</u> | Removes a category. |
| List Inputs | <u>Global Items – GetInputsXML</u> | Returns an XML string of all inputs in an LOB. |
| List Inputs | <u>Global Items – GetCategoryXML</u> | Returns an XML string of all categories in an LOB. |
| Updates | <u>Global Items – UpdateCategory</u> | Updates a category. |
| Updates | <u>Global Items – UpdateInput</u> | Updates an input. |
| Security Items | | |
| Add | <u>Security Items – CreateUser</u> | Creates a new user. |
| List | <u>Security Items – GetAvailableUsersSecurity Items – GetAvailableUsers</u> | Returns a list of all available users for the subscriber. |

| | | |
|--------------------------|---|--|
| List | <u>Security Items – GetAvailableUserGroups</u> | Returns a list of all available user groups. |
| Update | <u>Security Items – UpdateUser</u> | Updates a user's information. |
| Environment Items | | |
| List | <u>Environment Items – GetAvailableEnvironments Non-Secured</u> | Returns a list of all available non-secured environments. |
| List | <u>Environment Items – GetAvailableEnvironments, Selected</u> | Returns a list of all available environments within a selected environment type. |
| Releases | | |
| Add | <u>Releases Items – CreateRelease</u> | Creates a new release. |
| Delete | <u>Releases Items – DeleteRelease</u> | Removes a release. |
| List | <u>Releases Items – GetReleasePrograms</u> | Returns a list of all programs in release. |
| Update | <u>Releases Items – AddReleaseProgram</u> | Add a program version to a release. |
| Delete | <u>Releases Items – RemoveReleaseProgram</u> | Removes a program from the release. |
| SRP– IBFA | | |
| Copy | <u>SRP Items – CopySRP</u> | Copies an SRP from the current environment into a selected environment. |
| Delete | <u>SRP Items – DeleteSRP</u> | Deletes an SRP from the disk. |
| Export | <u>SRP Items – ExportSRP</u> | Exports an SRP from IBFA and converts it to bytes. |
| Import | <u>SRP Items – ImportSRP</u> | Imports SRP bytes into an IBFA environment. |
| List | <u>SRP Items – GetSRPList, ESI Created Only</u> | Returns a list of all ESI created SRPs in a select environment. |
| List | <u>SRP Items – GetSRPList, Selected SRP Type</u> | Returns a list of certain types of SRPs in a select environment. |
| Load | <u>SRP Items – LoadSRP</u> | Loads an SRP into an IBFA environment. |
| Move | <u>SRP Items – MoveSRP</u> | Moves an SRP from the current environment to the passed environment. |
| Save | <u>SRP Items – SaveFile</u> | Saves the bytes you pass into a physical file. |
| Unload | <u>SRP Items – UnloadSRP</u> | Unloads an SRP from a selected environment. |

RATEMANAGER INTERFACE

Class Definition

```
public class RateManager
{
    public const string gAppID = "RateManager";

    public RateManager(    string ApplicationTokenKey,
                        int    SubscriberId,
                        string UserId,
                        string TargetInstance)

    public RateManager(    string ApplicationTokenKey,
                        int    SubscriberId,
                        string TargetInstance)
```

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 ESI_Environment 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

- ESI_EnvironmentTypes
- Include Secured or Not

Outputs

- List of ESI_Environment 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

- LineID
- ProgramID
- ProgramVersion

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

- LineID
- ProgramID

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

- UserID
- LineID
- ProgramID
- ProgramVersion

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

- UserID
- LineID
- ProgramID

Outputs

- Returns a URL string to launch a Program.

Global Items – CreateCategory

Business Functionality

- Creates a category in a particular LOB.

Inputs

- ESI_Category object

Outputs

- Returns the ID of the newly created Category if succeeded or -1 if failed.

Global Items – CreateCategory with Inputs

Business Functionality

- Creates a category with inputs in a particular LOB.

Inputs

- ESI_Category object
- List of ESI_Input objects

Outputs

- No outputs.

Global Items – CreateCategoriesFromXML

Business Functionality

- Creates one or more categories in your default subline using an XML string.

Inputs

- None

Outputs

- Returns a List of ESI_Category.

Global Items – CreateInput

Business Functionality

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

Inputs

- ESI_Input object

Outputs

- Returns the ID of the newly created Input if succeeded or -1 if failed.

Global Items – DeleteCategory

Business Functionality

- Deletes a category in a particular Line.

Inputs

- ESI_Category

Outputs

- True if successful exception if failed.

Global Items – DeleteInput

Business Functionality

- Deletes a global level input in a particular Line.

Inputs

- ESI_Input

Outputs

- True if successful or false if failed.

Global Items – GetCategoryXML

Business Functionality

- Gets an XML string of all the categories in a particular LOB.

Inputs

- ESI_Category object

Outputs

- Return an XML string.

Global Items – GetInputsXML

Business Functionality

- Gets an XML string of all the inputs of a particular LOB.

Inputs

- LineID

Outputs

- Returns an XML string that includes all the inputs of that LOB.

Global Items – UpdateCategory

Business Functionality

- Updates a category in a particular Line.

Inputs

- ESI_Category

Outputs

- True if successful exception if failed.

Global Items – UpdateInput

Business Functionality

- Updates a global level input in a particular Line.

Inputs

- ESI_Input

Outputs

- True if successful or false if failed.

Program Items – CopyProgramVersion

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 ESI_ProgramVersion object.

Program Items – CreateFolderGroup

Business Functionality

- Creates a new folder in a particular LOB.

Inputs

- ESI_FolderGroup object

Outputs

- Returns an ESI_FolderGroup object.

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

- ESI_LOB object

Outputs

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

Program Items – CreateProgram

Business Functionality

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

Inputs

- ESI_Program object

Outputs

- ESI_Program object.

NOTE: For versions 3.12 and higher, the public string NOTE will no longer be available due to a schema change. That attribute must be left blank.

Program Items – CreateProgramVersion

Business Functionality

- Creates a new version of an existing program.

Inputs

- ESI_ProgramVersion object

Outputs

- Returns an ESI_ProgramVersion object.

Program Items – DeleteFolderGroup

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

- ESI_FolderGroup object

Outputs

- Returns True if succeeded or False if failed.

Program Items – DeleteLOB

Business Functionality

- Deletes an existing custom line of business.

Inputs

- LineID

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

- ESI_Program object

Outputs

- Returns a pass/fail value. Pass = true and Fail = false.

Program Items – GetAvailableFolderGroups

Business Functionality

- Gets a list of Folders of a particular LOB.

Inputs

- LineID

Outputs

- Returns a list of ESI_FolderGroup objects.

Program Items – GetAvailableFolderGroupsXML

Business Functionality

- Gets an XML string of available Folders of a particular LOB.

Inputs

- Line ID

Outputs

- Returns an XML string of available Folders of a specific LOB.

Program Items – UpdateFolderGroup

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

- ESI_FolderGroup object

Outputs

- Returns the updated Folder ID if succeeded or -1 if failed.

Program Items – UpdateLOB

Business Functionality

- Updates an existing line of business: name, date mask or activation status.

Inputs

- ESI_LOB object

Outputs

- Returns "True" if succeeded or "False" if failed.

Program Items – UpdateProgram

Business Functionality

- Updates a Program in the folder of your choosing.

Inputs

- ESI_Program

Outputs

- True if successful or exception if failed.

Program Items – UpdateProgramVersionLock

Business Functionality

- Locks or unlocks a program version.

Inputs

- ESI_ProgramVersion
- LockOption

Outputs

- True if successful or exception if failed.

Releases Items – CreateRelease

Business Functionality

- Creates a new Release.

Inputs

- ReleaseName – the release name
- ReleaseDescription – the release description
- ReleaseNotes – the release notes
- AdminEmail – the release admin email
- TargetEnvironment – the environment

Outputs

- Esi_Release object.

Releases Items – DeleteRelease

Business Functionality

- Deletes an existing release.

Inputs

- ReleaseID – the release being deleted
- ReleaseName – the release name
- ReleaseDescription – the release description
- ReleaseNotes – the release notes
- AdminEmail – the release admin email

Outputs

- True if successful or exception if failed.

Releases Items – AddReleaseProgram

Business Functionality

- Add a program version to an existing Release.

Inputs

- ESI_Release – the release the program version is being added to
- ESI_ProgramVersion – the program version that is being added

Outputs

- True if successful or exception if failed.

Releases Items – GetReleasePrograms

Business Functionality

- Lists the programs in a Release.

Inputs

- ESI_Release – the object being retrieved.

Outputs

- The ESI_Release object including the programs contained.

Releases Items – RemoveReleaseProgram

Business Functionality

- Removes a program version from a Release.

Inputs

- ESI_Release – the release the program version is being removed from.
- ESI_ProgramVersion – the program version that is being removed.

Outputs

- True if successful or exception if failed.

Security Items – CreateUser

Business Functionality

- Creates a new User.

Inputs

- ESI_User object

Outputs

- Returns True if succeeded or False if failed.

Security Items – GetAvailableUsers

Business Functionality

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

Inputs

- No inputs

Outputs

- Returns a list of EsiUsers.

Security Items – GetAvailableUserGroups

Business Functionality

- Gets all the available user groups.

Inputs

- No inputs

Outputs

- Returns a list of ESI_UserGroup objects.

Security Items – UpdateUser

Business Functionality

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

Inputs

- ESI_User object

Outputs

- Returns True if succeeded or False if failed.

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

- ESI_Program object
- Program Version
- ESI_Environment object

Outputs

- Returns the newly created ESI_SRP object.

FRAMEWORK ADMINISTRATOR INTERFACE

Class Definition

```
public class FrameworkAdministrator
{
    public const string gAppID = "FrameworkAdministrator";

    public FrameworkAdministrator(
        string ApplicationTokenKey,
        int SubscriberId,
        string TargetInstance)
}
```

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

- The environment the SRP to be copied to.
- The SRP to be copied.

Outputs

- True if succeeded or False 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

- The SRP to be deleted

Outputs

- True if succeeded or False 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

- The environment the SRP is to be exported
- The SRP to be exported

Outputs

- The bytes of the SRP

SRP Items – GetSRPList, ESI Created Only

Business Functionality

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

Inputs

- The environment from where the SRPs are to be retrieved.

Outputs

- A list of ESI_SRP objects.

SRP Items – GetSRPList, Selected SRP Type

Business Functionality

- Gets a list of SRPs of certain type in a particular environment.

Inputs

- The environment from where the SRPs are to be retrieved.
- SRP type: 0 = all SRPs; 1 = ESI created SRPs.

Outputs

- A list of ESI_SRP objects.

SRP Items – ImportSRP

Business Functionality

- Imports SRP bytes into an IBFA environment.

Inputs

- The environment the SRP is to be imported into
- SRP bytes to be imported

Outputs

- True if succeeded or False 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

- The environment the SRP is to be loaded in.
- The SRP to be loaded.

Outputs

- True if succeeded or False 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

- The environment the SRP is to be moved to.
- The SRP to be moved.

Outputs

- True if succeeded or False if failed.

SRP Items – SaveFile

Business Functionality

- Saves the bytes you pass in to a physical file.
- It gives ASP.NET Machine Account ("ASPNET") full control of that file.

Inputs

- The bytes to be saved
- The location and name the bytes are to be saved

Outputs

- True if succeeded or False 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

- The SRP to be unloaded.

Outputs

- True if succeed or False if failed.

EXCEPTION ERRORS

ESI_ExceptionLevel

```
public enum ESI_ExceptionLevel
{
    Critical    = 1,
    Warning    = 2,
    Information = 3
}
```

ESI_Exception

```
public class ESI_Exception : Exception
{
    public ESI_Exception Level;
    public string Message;
    public string Stack;
}
```

An ESI_Exception will be thrown if any error happens during the API function call.

An error message will be stored in ESI_Exception.Message and the stack trace information will be stored in ESI_Exception.Stack.

There's an ESI_Exception Level which gives you one of three levels:

- **Critical** – Any error that is not being handled by RateManager or IBFA (such as a NullReferenceException) will be Critical level.
- **Warning** – Any error that is caught by RateManager or IBFA (such as missing parameter, wrong parameter type, etc) will be Warning level.
- **Information** – No error has occurred but some information needs to be returned.

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.

NOTE: *Prior to creating a user, make sure you have your user groups created.*

To Add a New User

1. In RateManager, Tools→Security→**User Management**.
2. Click **NEW** to open the Add User tab.
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 Select Arrow – Move Left. Upon saving, the user will belong to that group.
4. Select the **Company** the user will belong to from the drop down listing.

Subscriber information may be needed by users when logging into the system. If more than one subscriber was created, users must be directed to the subscriber where their logins were created. Subscriber information is necessary for custom XML creation and testing and is also needed for Libraries.

If you have not created subscribers in IBFA, you will not be able to assign users to a company.

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.

Oracle Insurance Insubridge RateManager 04.05 - Windows Internet Explorer

ORACLE Insurance Insubridge RateManager Version: 04.05.00 Subscriber: alamere User: Company Administrator

File Modules Tools Help

Home User Management

Add User

You have selected to add/edit a user that will belong to a 'Group' that will control his/her rights for all Insubridge applications and a 'Company' that offers high level grouping for security. All new users will have a default password that should be changed on a successful login for security reasons. The required information is noted with an asterisk.

Groups

Member Of: ADMIN

Select Groups: RateLoaders, QA, RateAnalysis, BA

Company: alamere *

Firstname: *

Lastname: *

Username: *

Department: *

Network User: False

Phone: *

Email: *

Password Expires:

Save Cancel

Figure 1 Adding a New User

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.

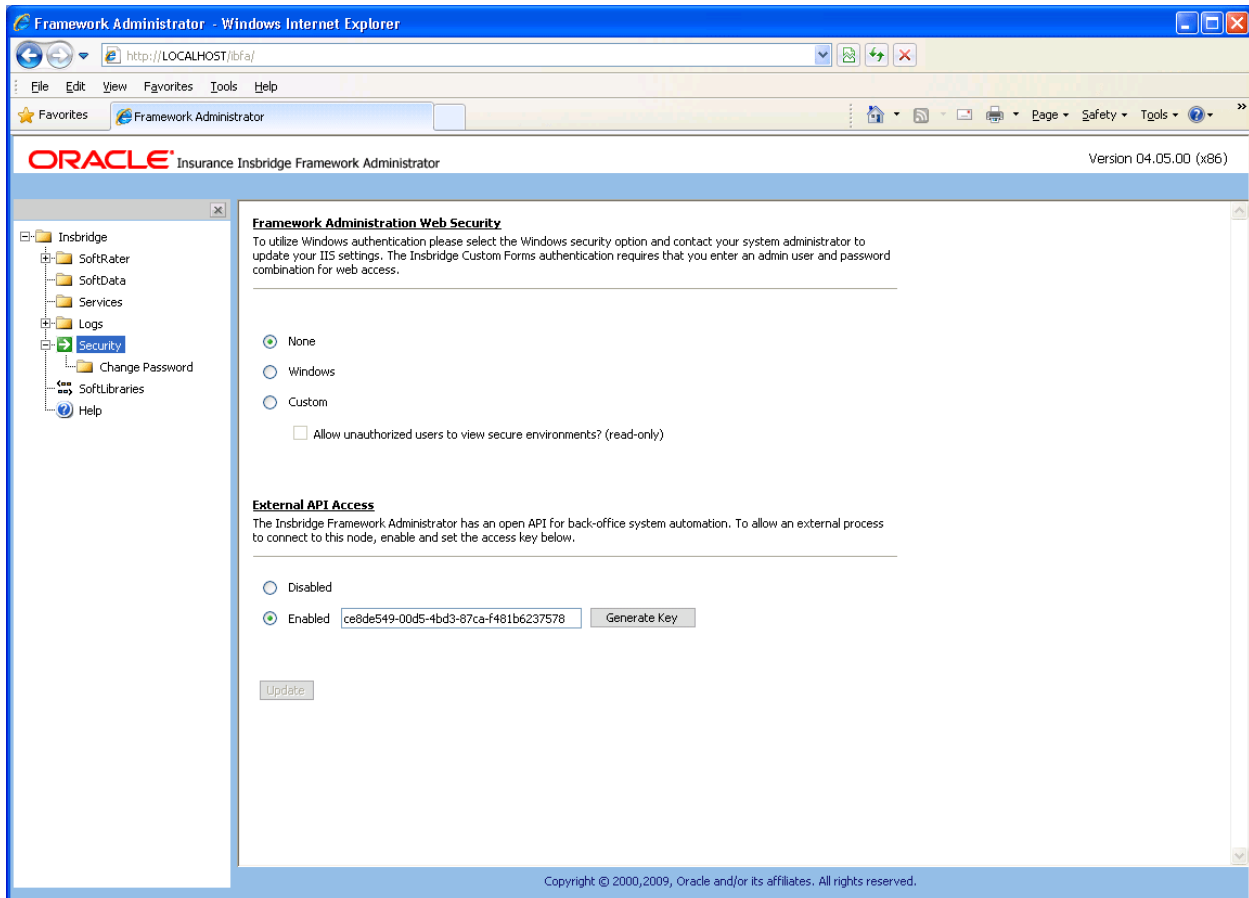


Figure 2 Allowing External API Access

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:

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

TTY ACCESS TO ORACLE SUPPORT SERVICES

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

INDEX

A

- Adding
 - New User in User Management, 28
- API Key, 30
- Authentication
 - ESI User, 28

B

- Base ESI Domain Types, 9
- Business Use Case, 10

C

- Category
 - Create, 15
 - Create from XML, 15
 - Create with Inputs, 15
 - Delete, 16
 - Get, XML, 16
 - Update, 16
- Class Definition
 - IBFA, 24
 - RateManager Interface, 13
- Company
 - Selecting for New User, 28
- Copy Definitions & All Data
 - Copying Programs, 17
- Copy Definitions Only
 - Copying Programs, 17
- Copy Program Version, 17
- Copy SRP, 24
- Create
 - Network Login, 28
- Create Category, 15
 - From XML, 15
 - With Inputs, 15
- Create Folder Groups, 17
- Create Input, 15
- Create LOB, 17
- Create New User, 22
- Create Program, 18
- Create Program Version, 18
- Create Release, 20
- Create SRP, 22
- Critical
 - ESI_Exception Level, 27

D

- Default
 - API Key, 30
- Delete Category, 16

- Delete Folder Groups, 18
- Delete Line, 18
- Delete Program, 19
- Delete Release, 21
- Delete SRP, 24
- Deletes Input, 16

E

- Edition Notice, 2
- Environments
 - Get Available, Non-Secured, 13
 - Get Available, Selected, 13
- ESI
 - Overview, 7
 - Rules, 8
- ESI Domain Types, 9
- ESI_Exception, 27
- ESI_Exception Level, 27
- ESI_ExceptionLevel, 27
- Example
 - Business Use Case, 10
- Export SRP, 24

F

- Fail to Delete, 19
- False
 - New Users, 29
- Folder
 - Create, 17
 - Delete, 18
 - Get Available, 19
 - Get Available, XML, 19
 - Update, 19

G

- Get Available
 - Environments, Non-Secured, 13
 - Environments, Selected, 13
 - User Groups, 22
- Get Available Folder Groups, 19
- Get Available Folder Groups XML, 19
- Get Category XML, 16
- Get Inputs XML, 16
- Get SRP List
 - All, 25
 - Selected, 25
- Group
 - Selecting for New User, 28

I

- IBFA

- Class Definition, 24
 - System Configuration, 30
- Import SRP, 25
- Information
 - ESI_Exception Level, 27
- Inputs
 - Create New, 15
 - Delete, 16
 - Get, XML, 16
 - Update, 17

L

- Launch Definition
 - First Version, 14
 - Selected Version, 14
- Line
 - Delete, 18
- List Release, 21
- Load SRP, 25
- LOB
 - Create, 17
 - Update, 20
- Locked Program
 - Fail to Delete, 19

M

- Move SRP, 26

N

- Network Login
 - ESI Authentication, 28
- Network User
 - New User, 29
- New User in User Management
 - Adding, 28

O

- Overview
 - ESI, 7

P

- Password
 - Default, 28
- Password Expires
 - New User, 29
- Program
 - Copy, 17
 - Copy Definitions & All Data, 17
 - Copy Definitions Only, 17
 - Create, 18
 - Create New Version, 18
 - Delete, 19
 - Update, 20
 - Update Version Lock, 20

R

- RateManager Login
 - Create Launch First Version, 14
 - Create Launch Selected Version, 14
 - ESI Authentication, 28
- Release
 - Create, 20
 - Delete, 21
 - Delete Program, 21
 - List Program, 21
 - Update, 21
- Rules
 - ESI, 8
 - Username, 28

S

- Save File SRP, 26
- SRP
 - Copy, 24
 - Create, 22
 - Delete, 24
 - Export, 24
 - Get List, All, 25
 - Get List, Selected, 25
 - Import, 25
 - Load, 25
 - Move, 26
 - Save File, 26
 - Unload, 26
- System Configuration
 - IBFA, 30
- System Requirements, vi

T

- True
 - New Users, 29

U

- Unload SRP, 26
- Update Category, 16
- Update Folder Groups, 19
- Update Input, 17
- Update LOB, 20
- Update Program, 20
- Update Program Version Lock, 20
- Update Release, 21
- Update User, 22
- User
 - Create New, 22
 - Network User for New, 29
 - Selecting Company for New, 28
 - Selecting Group for New, 28
 - Update, 22
 - Username for New, 28
- User Authentication, 29
- User Groups
 - Get Available, 22
- Username

New User, 28
Rules, 28
Users
 Password Expires, 29

W

Warning
 ESI_Exception Level, 27