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Insbridge Enterprise Rating

ESI for Windows User Guide

Release 4.8

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Oracle Insurance Insbridge Enterprise Rating ESI for Windows User Guide

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PREFACE

Welcome to the *Oracle Insurance Insbridge Enterprise Rating 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 Enterprise Rating RateManager User Guide.
- The Oracle Insurance Insbridge Enterprise Rating EIS_Help File.
- The Oracle Insurance Insbridge Enterprise Rating 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.
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 7 or later
- Microsoft .NET 3.5
- Microsoft Web Services Enhancements 3.0 for Microsoft .NET Framework
- Unzip utility for using ESI system configuration

Manual History

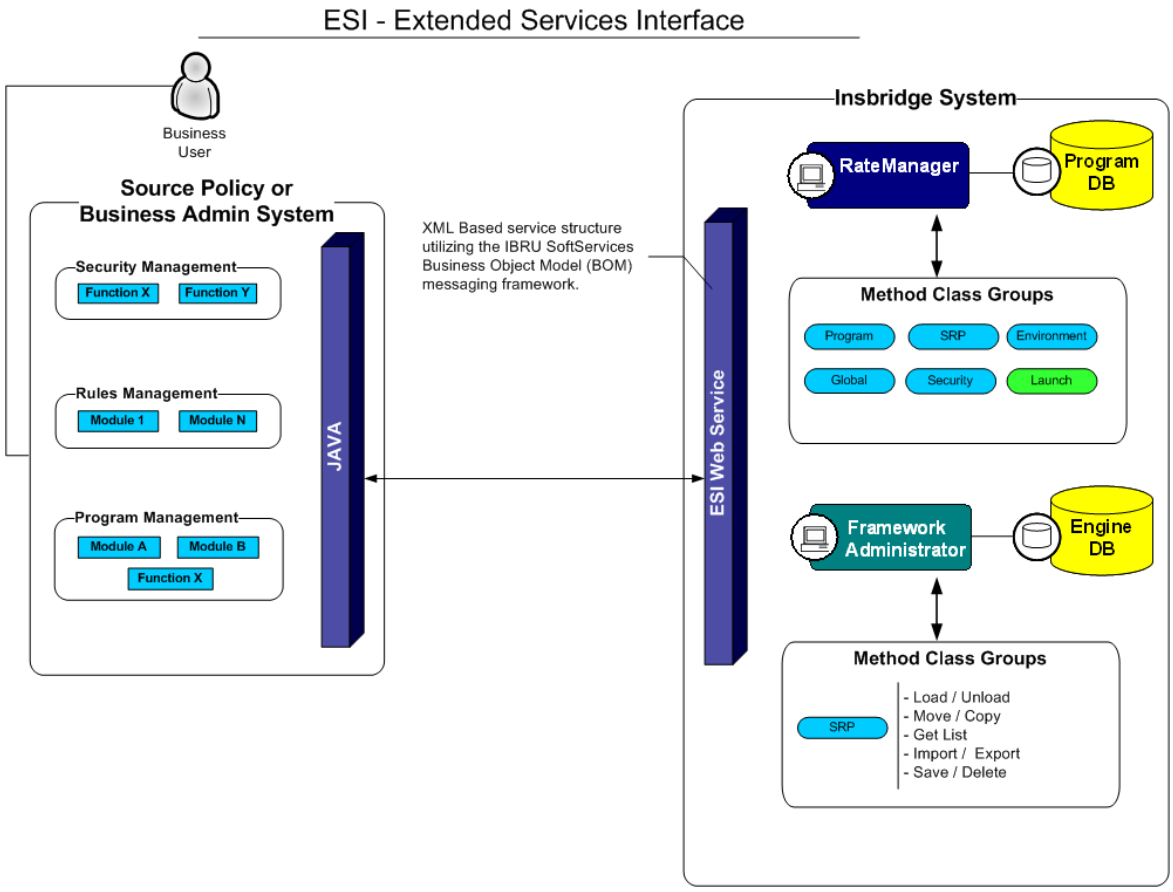
New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition	P01-767-01	V 3.11.01	December 2008	Initial release
2nd Edition	P01-767-02	V 3.12.00	July 2009	Update Version
3rd Edition	P01-767-03	V 3.13.00	December 2009	Update Version
4th Edition	P01-767-04	R 4.0	April 2010	Update Release
5th Edition	P01-767-05	R 4.0.1	August 2010	Update Release
6th Edition	P01-767-06	R 4.1	December 2010	Update Release
7th Edition	P01-767-07	R 4.5	May 2011	Update Release
8th Edition	P01-767-08	R 4.5.1	September 2011	Update Release
9th Edition	P01-767-09	R 4.6	May 2012	Update Release
10th Edition	P01-767-10	R 4.6.1	November 2012	Update Release
11th Edition	P01-767-11	R 4.7	September 2013	Update Release
12th Edition	P01-767-12	R 4.7.1	November 2013	Update
13th Edition	P01-767-13	R 4.8	August 2014	Update

Chapter 1

INTRODUCTION TO INSBRIDGE EXTENDED SERVICES INTERFACE

Oracle Insurance Insbridge Enterprise Rating Extended Services Interface (ESI) is a library module designed to provide remote services to the Insbridge Enterprise Rating (IBER) 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 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 connects 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 on 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 Enterprise Rating version 3.11 or higher.
- ESI is 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 contains 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.*

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 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	General – CreateLauchDefinition (Selected Version, Network Login)	Method returns 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 returns 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 returns 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 returns 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 Version	Program Items – CopyProgramVersion	Copies an existing Insbridge program version to a new specified version.
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 – CreateFolderGroup	Creates a new folder.
Delete	Program Items – DeleteFolderGroup	Removes a folder.
List Folders	Program Items – GetAvailableFolderGroups	Returns a list of folders in an LOB.
List Folders	Program Items – GetAvailableFolderGroupsXML	Returns an XML string of all available folders in an LOB.
Update	Program Items – UpdateFolderGroup	Updates the name or location of a folder.
Line of Business		
Add	Program Items – CreateLine	Creates a new LOB.
Delete	Program Items – DeleteLOB	Removes an Line.
Update	Program Items – UpdateLOB	Updates an LOB.
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 that includes inputs.
Add	Global Items – CreateCategoriesFromXML	Creates a new category using an XML string.
Delete	Global Items – DeleteInput	Removes an input.
Delete	Global Items – DeleteCategory	Removes a category.
List Inputs	Global Items – GetInputsXML	Returns an XML string of all inputs in an LOB.
List Inputs	Global Items – GetCategoryXML	Returns an XML string of all categories in an LOB.
Updates	Global Items – UpdateCategory	Updates a category.
Updates	Global Items – UpdateInput	Updates an input.
Security Items		
Add	Security Items – CreateUser	Creates a new user.
List	Security Items – GetAvailableUsersSecurity Items – GetAvailableUsers	Returns a list of all avaialable users for the subscriber.

List	Security Items – GetAvailableUserGroups	Returns a list of all avaialable user groups.
Update	Security Items – UpdateUser	Updates a user's information.
Environment Items		
List	Environment Items – GetAvailableEnvironments Non-Secured	Returns a list of all available non-secured environments.
List	Environment Items – GetAvailableEnvironments, Selected	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.
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, ESI Created Only	Returns a list of all ESI created SRPs in a select environment.
List	SRP Items – GetSRPList, Selected SRP Type	Returns a list of certain types of SRPs in a select environment.
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.

Chapter 3

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 copies all elements of the program with the exception of the data contained in mapped variables.
    - **Copy Definitions & All Data:** This option copies 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, is 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 is no longer 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 are not deleted but are now 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 returns 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 are 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 has the identifier “API” in the filename and shows an icon on IBFA SRP list.
- **Inputs**

  - ESI_Program object
  - Program Version
  - ESI_Enviroment object
- **Outputs**
  - Returns the newly created ESI_SRP object.

Chapter 4

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 returns a list of ESI_SRP's. Every ESI_SRP has the environment and other information. CopySRP gets 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 tells 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
  - SRP file name to be saved as
- **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 tells 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.

Chapter 5

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 is thrown if any error happens during the API function call.

Error messages are stored in ESI_Exception.Message and the stack trace information is stored in ESI_Exception.Stack.

There is 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) is Critical level.
- **Warning** – Any error that is caught by RateManager or IBFA (such as missing parameter, wrong parameter type, etc) is Warning level.
- **Information** – No error has occurred but some information needs to be returned.

Chapter 6

ESI USER SETUP AND AUTHENTICATION

There are two types of authentication in ESI RateManager Interface:

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

You must 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 are 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 belongs to by selecting a group or groups from the Select Groups list and then clicking Select Arrow – Move Left. Upon saving, the user belongs to that group.
4. Select the **Company** the user belongs 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) are 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 contains the number of days required for a password change.

11. When you are finished, click **SAVE**. The user is added to the system and the user list is 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.

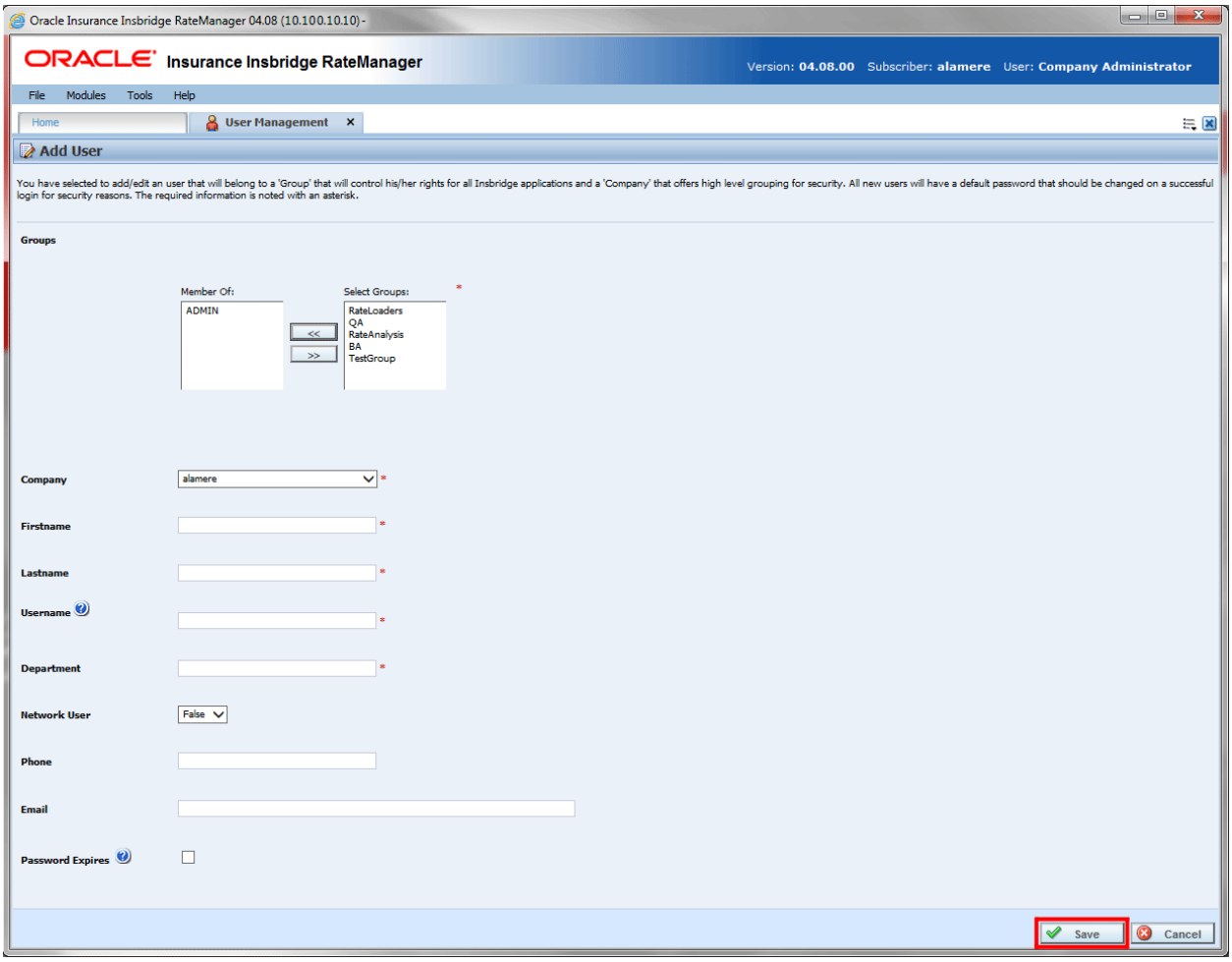


Figure 1 Adding a New User

Chapter 7

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 is 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 is unique.

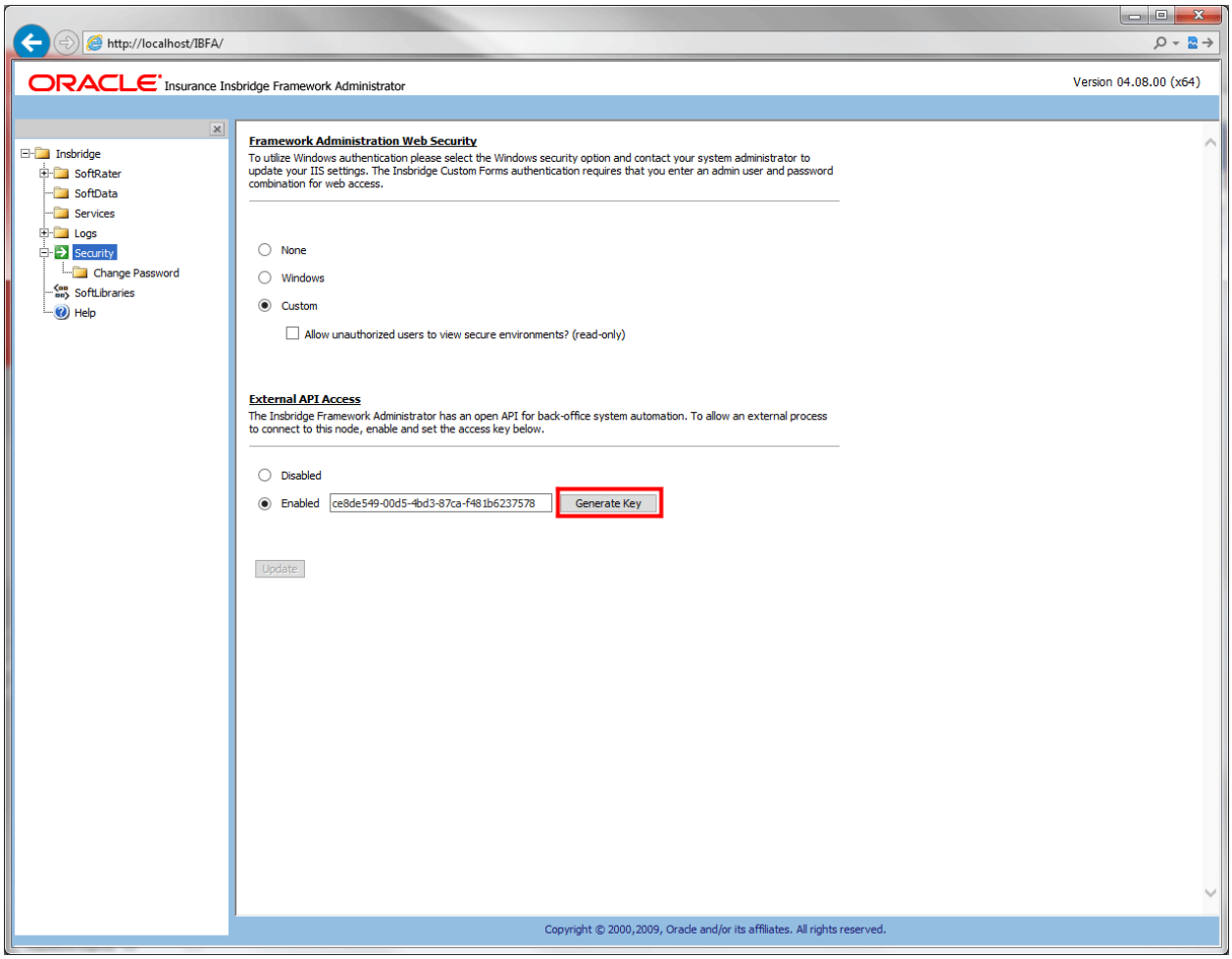


Figure 2 Allowing External API Access

Chapter 8

ESI USER TESTER

To use ESI's User Testing for Windows, you may need to deploy a WSE3.0 file, available from Microsoft.

INSTALLATION

List of Files

Following are the list of files needed to test ESI

File	Usage
ESI_Help.chm	A .chm file with help topics.
ESI_Tester.exe	Esi Tester executable.
Insbridge.Net.FWK.ESI.dll	Esi needed dll file.

Prerequisite:

- ESI for Windows requires a WSE3.0 file installed.
- Insbridge.Net.FWK.ESI.dll must be in the same folder as the ESI_Tester.exe.

Chapter 9

ESI TESTER

To use the ESI Tester, launch the .cmd file. The ESI tester runs on a Windows machine.

RM FEATURES/METHODS

- Test Security
- Test Globals
- Test Program Items
- Test IBFA
- Test Releases
- Test List Items

Test Security

Allows for the adding and editing of User Groups and Users.

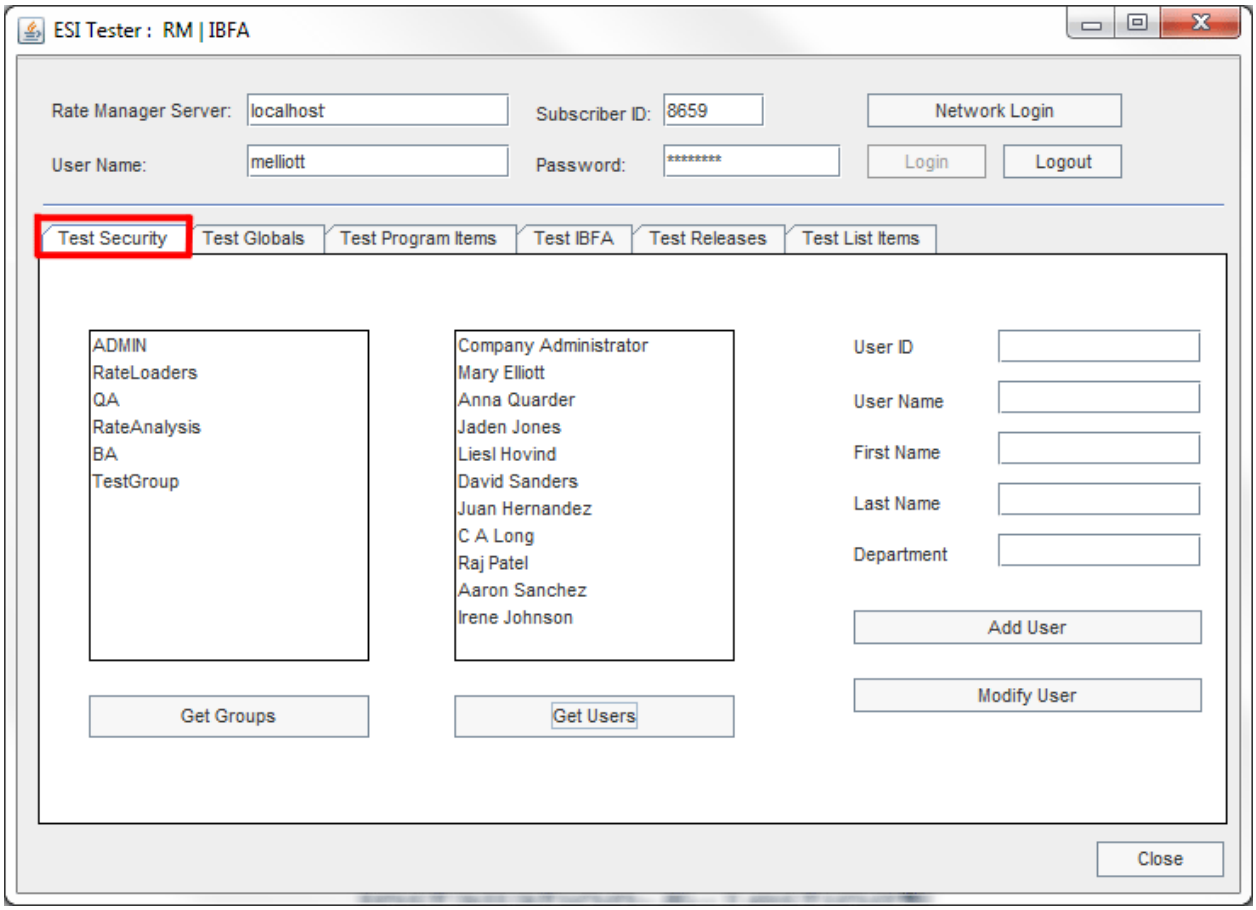


Figure 3 Test Security

- Get Groups returns the current groups in the system
- Get Users returns a list of the current users in the system.
- Add User and Modify User requires**:**
  - User Name
  - First Name
  - Last Name

    Other fields are optional

Test Globals

Allows for the adding, editing and deleting of LOBs, Categories, and Inputs.

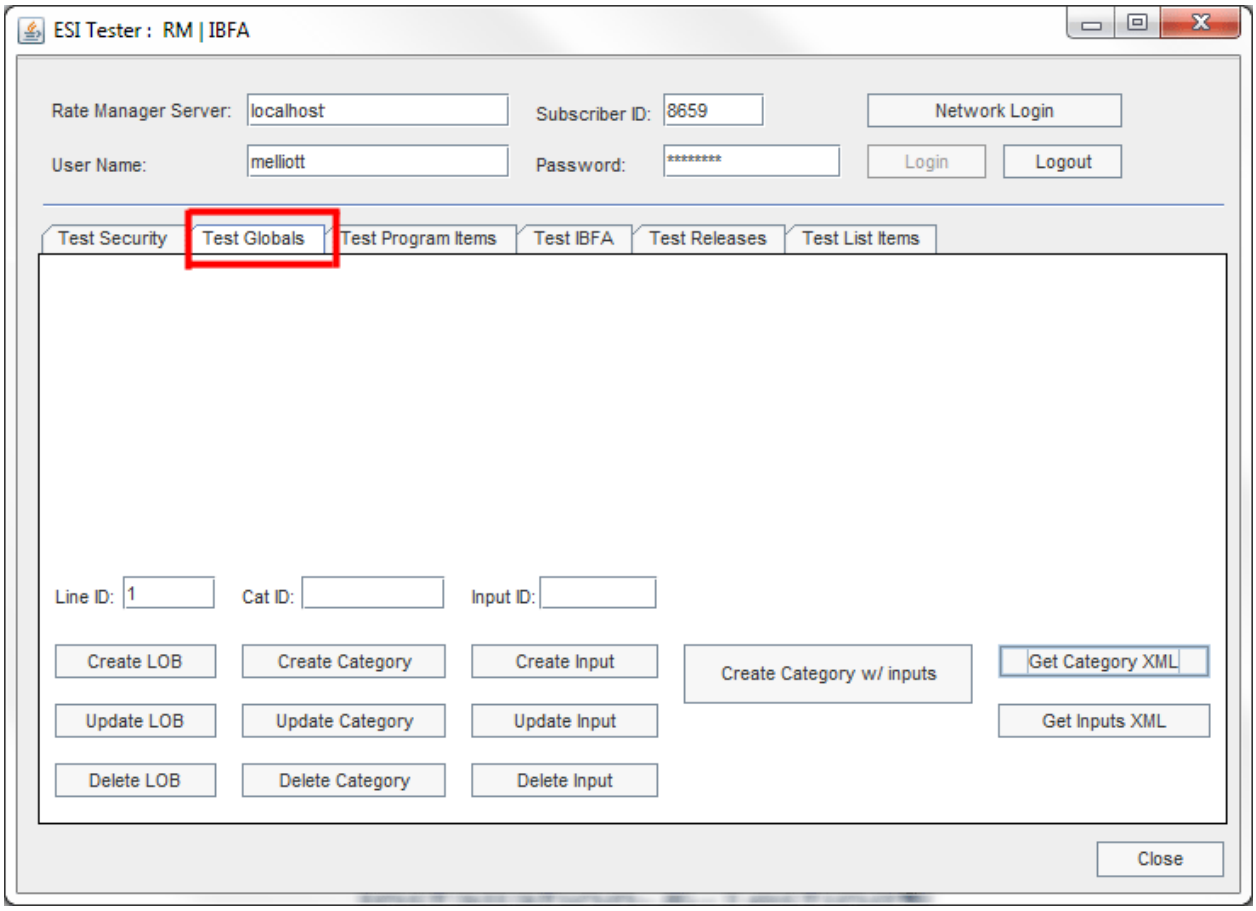


Figure 4 Test Globals

LOB requests require a Line ID.

- Get Category XML returns the details of the categories in the selected line.
- Get Inputs XML returns the details of the inputs in the selected line.

Test Program Items

Allows for viewing, adding, editing, copying and deleting of program items.

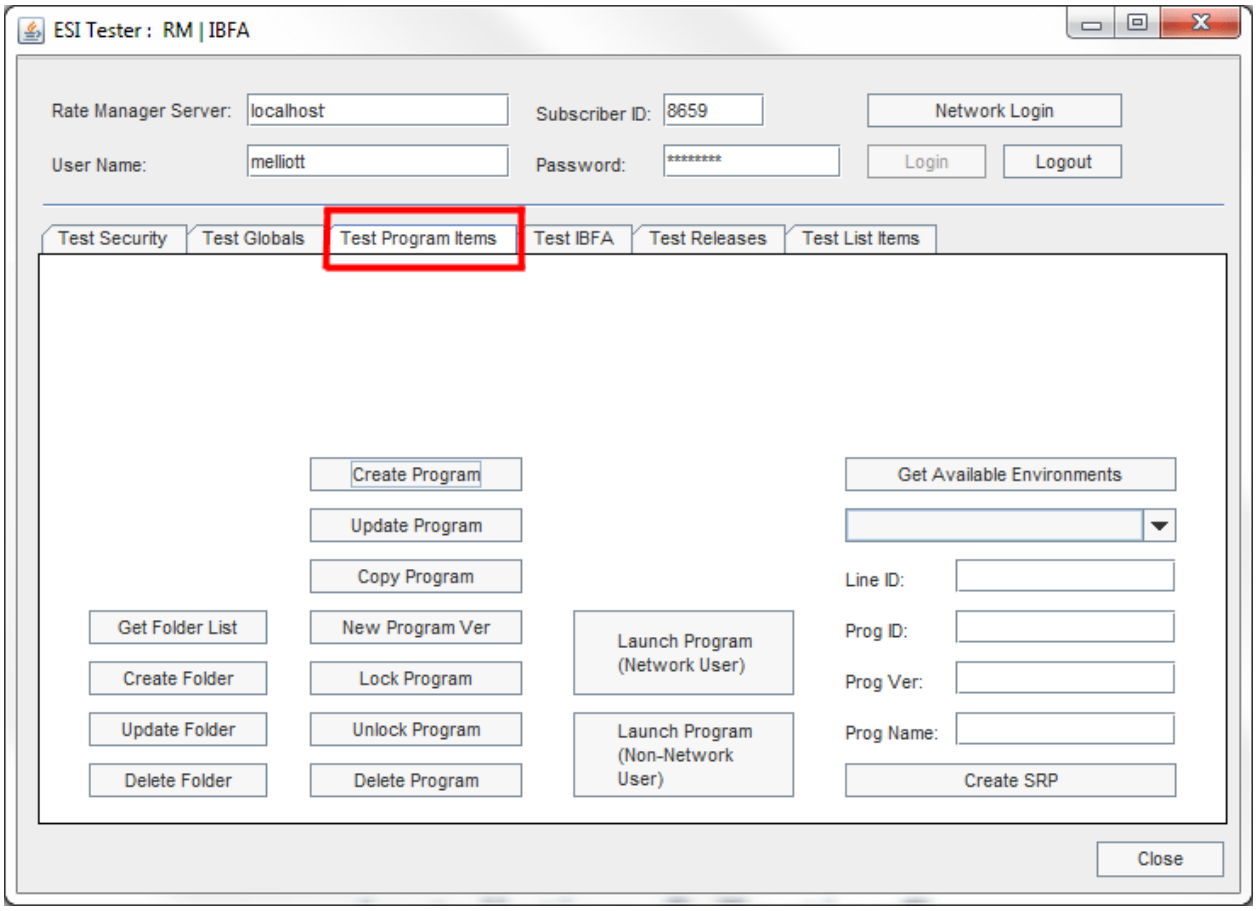


Figure 5 Test Program Items

Get Available Environments returns the environments available. The list is populated drop down.

Get Folder List requires a Line ID and returns a list of folders in the line.

Test IBFA

Allows for SRPs to be managed.

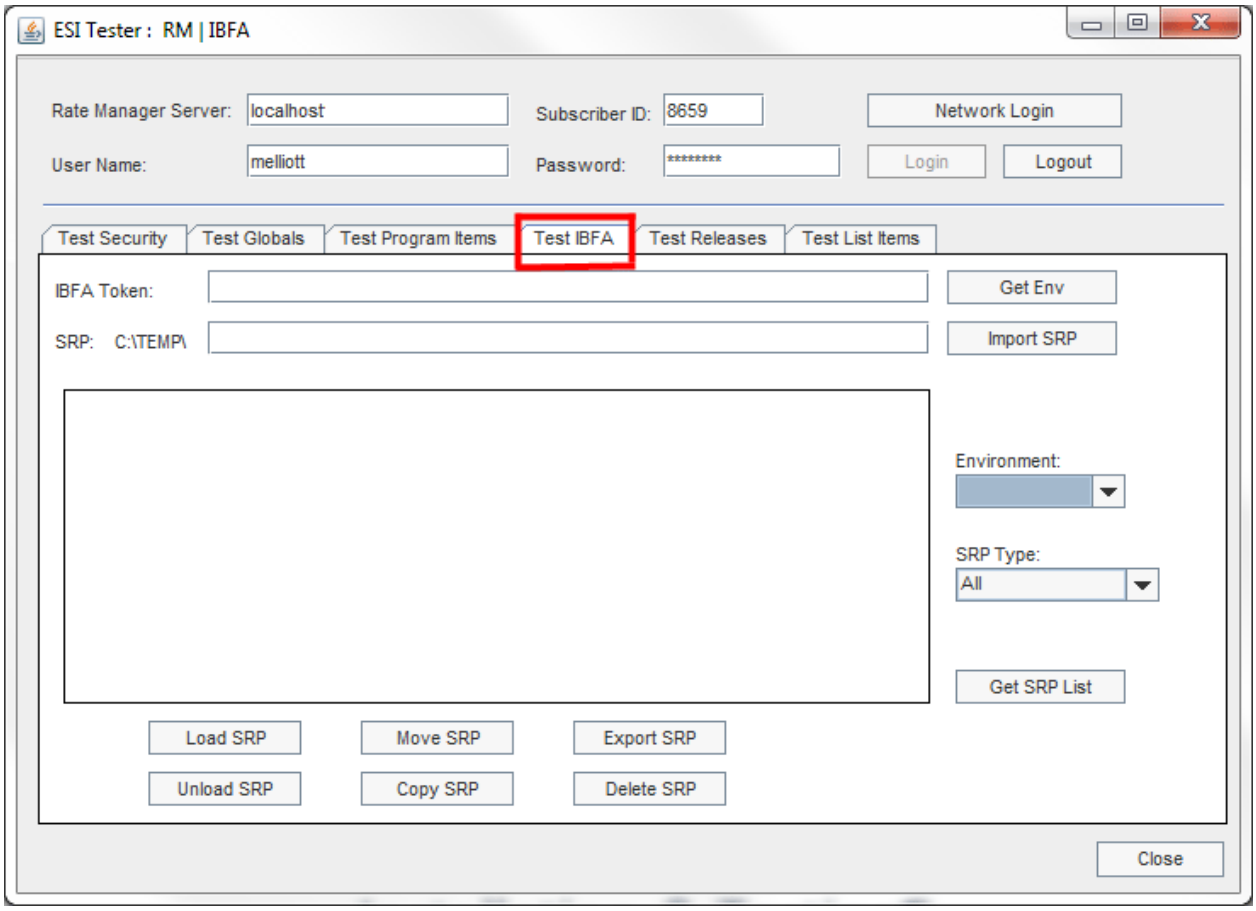


Figure 6 Test IBFA

Get Env returns the environments available. The list is populated Environment drop down.

Test Releases

Allows for the management of releases.

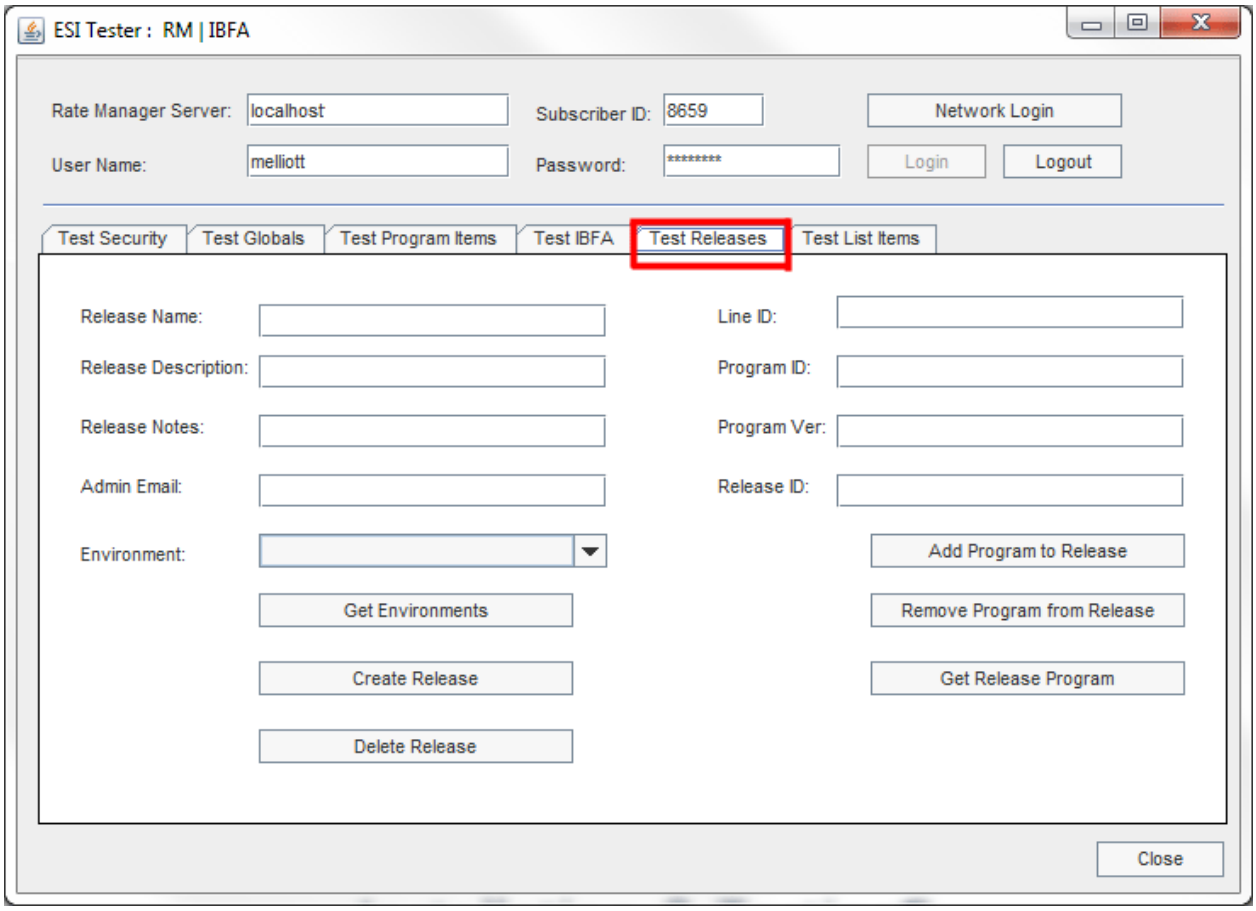


Figure 7 Test Releases

Get Environments returns the environments available. The list is populated Environment drop down.

Test List Items

- Return a list of lines of business
- Return a list of schemas for a particular line of business
- Return a list of subline (schema) folders for a particular schema
- Return a list of folder for a particular subline folder
- Return a list of programs for a subline folder
- Return a list of program versions for a particular program
- Return the XML for the program version report for a particular program version

NOTE: *For the above all features it will return the list in the XML format.*

Test List Items allows you to build a treeview that follows the program explorer in RateManager and for the XML used for the program version report to be returned.

The columns on the right follow the treeview found on the Program Explorer in RateManager.

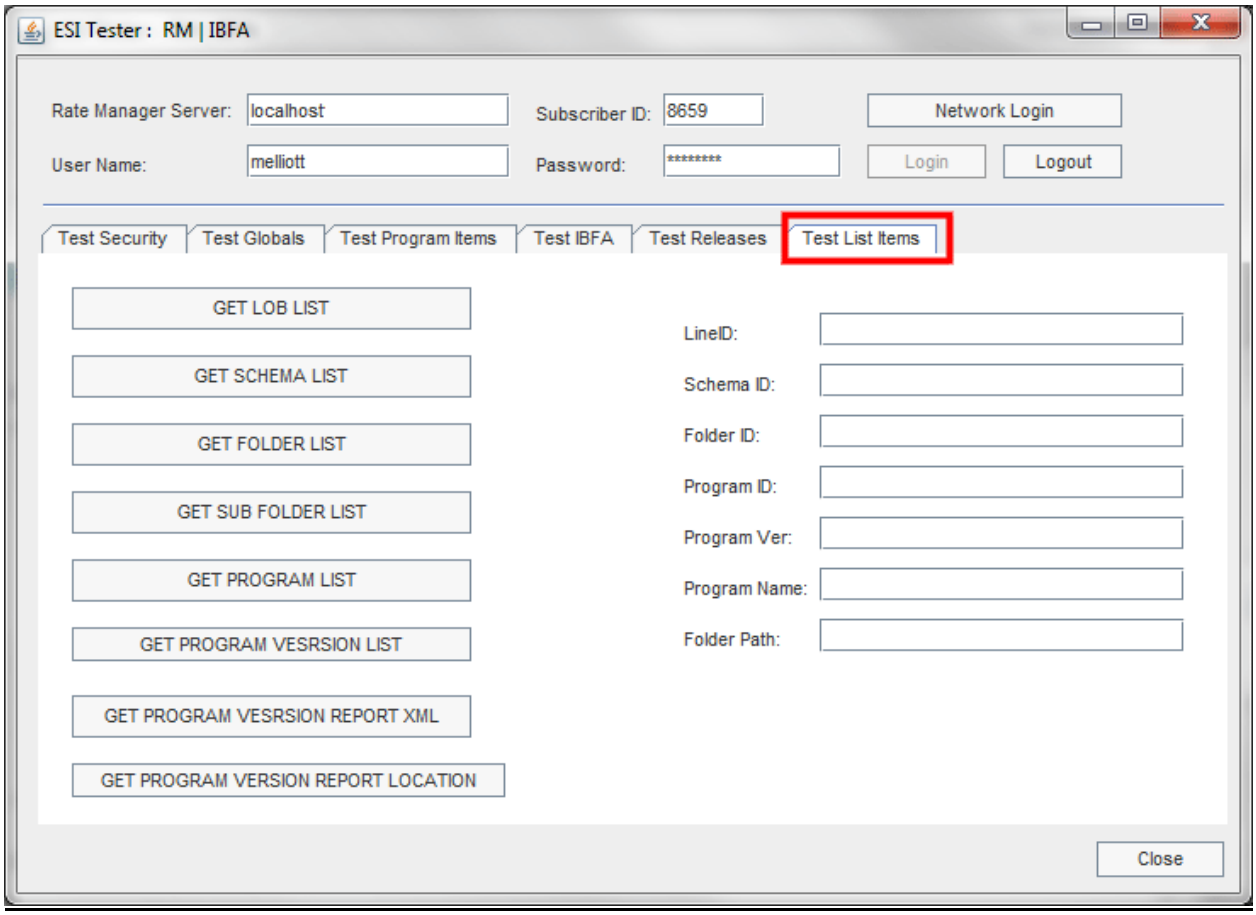


Figure 8 Java ESI Tester for RM

To Use

Options are available after you enter in the Subscriber ID, username and password.

Enter in any required input and click the button of the items where you want returned. The output is returned in XML format.

GET LOB LIST

- **Input:** No input is required.
- **GET LOB LIST:** Gets an XML string of all the line of business including active and inactive lobs.
- **Output:** Returns an XML string of available LOB's. XML string has:
  - LOB_ ID
  - LOB_NAME
  - ACTIVE attributes

GET SCHEMA LIST

- **Inputs:** Line ID.
- **GET SCHEMA LIST:** Gets an XML string of available schemas of a particular LOB.
- **Outputs:** Returns an XML string that includes all the schemas of that LOB. XML string has:
  - LOB_ID
  - SCHEMA_ID
  - SCHEMA_ NAME

GET FOLDER LIST

- **Inputs:** Line ID and Schema ID.
- **GET FOLDER LIST:** Gets an XML string of available folders of a particular Schema.
- **Outputs:** Returns the XML string that includes all the folders of that Schema. XML String has:
  - LOB_ID
  - SCHEMA_ID
  - FOLDER_ID
  - FOLDER_ NAME

GET SUB FOLDER LIST

- **Inputs:** Line ID, Schema ID and Folder ID.
- **GET SUB FOLDER LIST:** Gets an XML string of available sub folders of a particular subline folder/ folder.

- **Outputs:** Returns an xml string that includes all the sub folders of that Subline Folder/Folder.
  XML string has

  - LOB_ID
  - SCHEMA_ID
  - FOLDER_ID
  - FOLDER_ NAME
  - FOLDER_PARENT_ID

GET PROGRAM LIST

- **Inputs:** Line ID, Schema ID and Folder ID.
- **GET PROGRAM LIST:** Gets an XML string of available Programs of a particular folder.
- **Outputs:** Returns an xml string that includes all programs of that Folder.
  XML string has:

  - LOB_ID
  - SCHEMA_ID
  - FOLDER_ID
  - PROGRAM_ ID
  - PROGRAM_ NAME

GET PROGRAM VERSIONS LIST

- **Inputs:** Line ID, Schema ID, Folder ID and Program ID.
- **GET PROGRAM VERSIONS:** Gets an XML string of available Program versions of a particular program.
- **Outputs:** Returns an xml string that includes all program versions of that Program.

XML string has:

  - LOB_ID
  - SCHEMA_ID
  - FOLDER_ID
  - PROGRAM_ ID
  - VERSION

GET PROGRAM VERSION REPORT XML

- **Inputs:** Line ID, Schema ID, Folder ID, Program ID, Program Ver and Program Name.
- **GET PROGRAM VER REPORT XML:** Gets an XML string of program version report of a particular program version.
- **Outputs:** Returns an XML string of program version report.

GET PROGRAM VERSION REPORT LOCATION

This method returns the saved location of the program version report.

- **Inputs:** Line ID, Schema ID, Folder ID, Program ID, Program Ver , Program Name and Folder Path(optional).
- **Outputs:** Returns the saved location of the program version report.

NOTE: *The input Folder Path is optional. Folder Path is the Folder/Directory location of the report where it has to save. If we give the folder path it will generate the report and saves in the given location. If we don't give the Folder Path then by default system will create one location and it will save that location.*

Output

Output is in XML format.

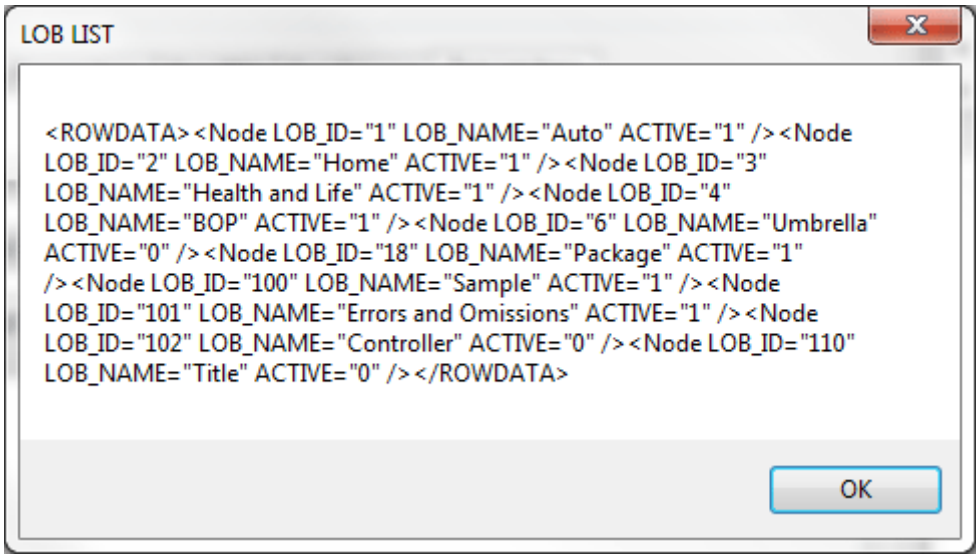


Figure 9 Tester Output

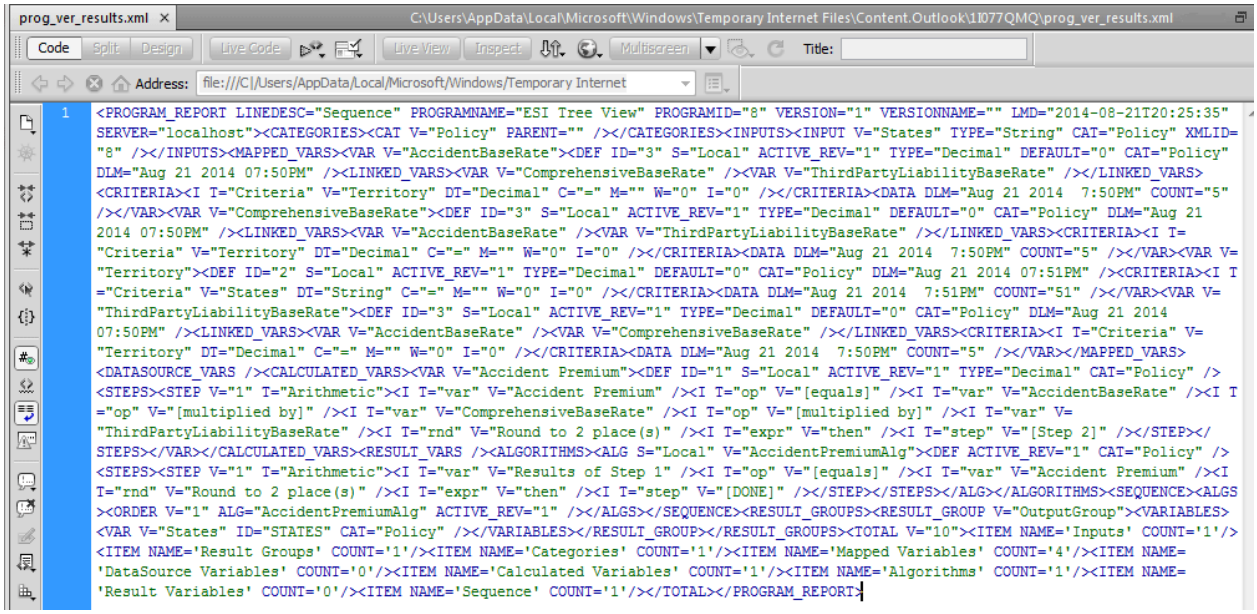


Figure 10 Program Result XML File

CONTACTING SUPPORT

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

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Address any additional inquiries to:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

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