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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 online 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

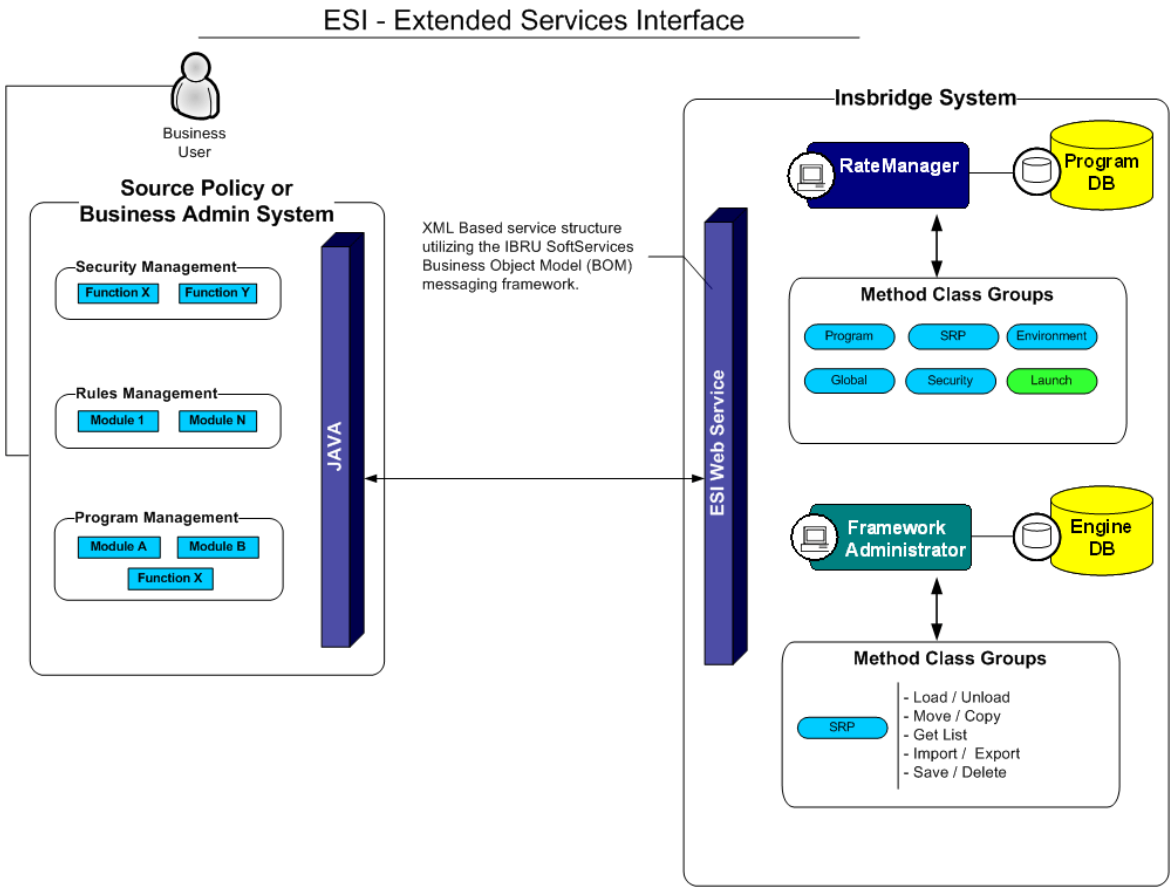
New editions incorporate any updates issued since the previous edition.

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
14th Edition	P01-767-14	R 4.9	December 2014	Update
15th Edition	P01-767-15	R 5.1	December 2015	Update
16th Edition	P01-767-16	R 5.2	July 2016	Update
17th Edition	P01-767-17	R 5.3	October 2016	Update
18th Edition	P01-767-18	R 5.4	January 2017	Update

Chapter 1

INTRODUCTION TO INSBRIDGE EXTENDED SERVICES INTERFACE

Oracle Insurance Insbridge Enterprise Rating Extended Services Interface for Windows (ESI) is a library module designed to provide remote services to the Insbridge Enterprise Rating (Insbridge) 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 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 Insbridge 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\Windows. This file contains:
  - Insbridge.Net.Fwk.ESI.dll
  - ESI_Help.chm
  - ESI_Help.chw
  - ESI_Tester
  - Microsoft WSE 3.0.msi
- 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.
- 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 within 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.
Security Items		
Add	Security Items – CreateUser	Creates a new user.
List	Security 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.
Global/Universal Items		
Add	Global Items – CreateField	Creates a new field.
Add	Global Items – CreateCategory	Creates a new category.
Add	Global Items – CreateCategory with Fields	Creates a new category that includes fields.

Add	Global Items – CreateCategoriesFromXML	Creates a new category using an XML string.
Add	Global Items – CreateProduct	Creates a new product.
Delete	Global Items – DeleteField	Removes a field.
Delete	Global Items – DeleteCategory	Removes a category.
Delete	Global Items – DeleteProduct	Removes a product.
List Fields	Global Items – GetFieldsXML	Returns an XML string of all fields in a project.
List Fields	Global Items – GetCategoryXML	Returns an XML string of all categories in a project.
Updates	Global Items – UpdateCategory	Updates a category.
Updates	Global Items – UpdateField	Updates a field.
Update	Global Items – UpdateProduct	Updates a product.
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 a product.
List Folders	Program Items – GetAvailableFolderGroupsXML	Returns an XML string of all available folders in a product.
Update	Program Items – UpdateFolderGroup	Updates the name or location of a folder.
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.
Update	Program Items – UpdateProgramVersionName	Add or updates a program version name.
Program Version Notes		
Add	Program Items – CreateProgramVersionNote	Creates a new program version note.

Delete	Program Items – DeleteProgramVersionNote	Removes a program version note.
List	Program Items – GetProgramVersionNotes	Returns list of program version notes.
Update	Program Items – UpdateProgramVersionNote	Updates a program version note.
Table Data		
Add	Program Items – CreateTableRevision	Creates a new table revision.
Add	Program Items – CreateTableRevisionNote	Creates a table revision note.
Delete	Program Items – DeleteTableRevisionNote	Deletes a note from a table revision.
Export	Program Items – ExportTableRevisionData	Export table variable data.
List	Program Items – GetTable RevisionNotes	Returns a list of notes on a table revision.
Update	Program Items – UpdateTableRevisionNote	Updates a note on a table revision.
SRP – RateManager		
Add	SRP Items – CreateSRP	Creates an SRP and returns the SRP object.
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.
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.
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.
Program Versioning		
Add	Program Versioning Data – InsertRow	Adds a row to program versioning data.
Add	Program Versioning Data – InsertMultiRows	Adds multiple rows to program versioning data
Delete	Program Versioning Data – DeleteRow	Removes a row from program versioning data.
Update	Program Versioning Data – UpdateCell	Updates cell data in program versioning data.

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**
  - ProductID
  - 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**
  - ProductID
  - 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
  - ProductID
  - 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
  - ProductID
  - ProgramID

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

Global Items – CreateCategory

- **Business Functionality**
  - Creates a category in a particular product.
- **Inputs**
  - ESI_Category object
- **Outputs**
  - Returns the ID of the newly created Category if succeeded or -1 if failed.

Global Items – CreateCategory with Fields

- **Business Functionality**
  - Creates a category with fields in a particular project.
- **Inputs**
  - ESI_Category object
  - List of ESI_Field objects
- **Outputs**
  - No outputs.

Global Items – CreateCategoriesFromXML

- **Business Functionality**
  - Creates one or more categories using an XML string.
- **Inputs**
  - None
- **Outputs**
  - Returns a List of ESI_Category.

Global Items – CreateField

- **Business Functionality**
  - Creates a new field in a particular project.
- **Inputs**
  - ESI_Field object
- **Outputs**
  - Returns the ID of the newly created field if succeeded or -1 if failed.

Global Items – CreateProduct

- **Business Functionality**
  - Creates a new product. The product is activated and available in RateManager. In order for any users to use the new product, groups must have access privileges granted.
- **Inputs**
  - ESI_PRODUCT object
- **Outputs**
  - Returns the ID of the newly created product if succeeded or -1 if failed.

Global Items – DeleteCategory

- **Business Functionality**
  - Deletes a category in a particular project.
- **Inputs**
  - ESI_Category
- **Outputs**
  - True if successful exception if failed.

Global Items – DeleteField

- **Business Functionality**
  - Deletes a field in a particular project.
- **Inputs**
  - ESI_Field
- **Outputs**
  - True if successful or false if failed.

Global Items – DeleteProduct

- **Business Functionality**
  - Deletes an existing custom product.
- **Inputs**
  - ProductID
- **Outputs**
  - True if successful or exception if failed.

Global Items – GetCategoryXML

- **Business Functionality**
  - Gets an XML string of all the categories in a particular project.
- **Inputs**
  - ESI_Category object
- **Outputs**

- Return an XML string.

Global Items – GetFieldsXML

- **Business Functionality**
  - Gets an XML string of all the fields of a particular project.
- **Inputs**
  - ProjectID
- **Outputs**
  - Returns an XML string that includes all the fields of that project.

Global Items – UpdateCategory

- **Business Functionality**
  - Updates a category in a particular project.
- **Inputs**
  - ESI_Category
- **Outputs**
  - True if successful exception if failed.

Global Items – UpdateField

- **Business Functionality**
  - Updates a field in a particular project.
- **Inputs**
  - ESI_Field
- **Outputs**
  - True if successful or false if failed.

Global Items – UpdateProduct

- **Business Functionality**
  - Updates an existing product: name, date mask or activation status.
- **Inputs**
  - ESI_PRODUCT object
- **Outputs**
  - Returns "True" if succeeded 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 product.
- **Inputs**
  - ESI_FolderGroup object
- **Outputs**
  - Returns an ESI_FolderGroup object.

Program Items – CreateProgram

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

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 – CreateProgramVersionNote

- **Business Functionality**
  - Creates a new note on the selected program version.
- **Inputs**
  - ESI_Program object
- **Outputs**
  - ESI_Program object.

Program Items – CreateTableRevision

- **Business Functionality**
  - Creates a new revision of an existing table variable.
- **Inputs**
  - ESI_ProgramVersion object
  - ESI_TableVersion object
- **Outputs**
  - Returns an ESI_TableRevision object.

Program Items – CreateTableRevisionNote

- **Business Functionality**
  - Creates a new note on the selected table revision.
- **Inputs**
  - ESI_Program object
  - ESI_Table object
- **Outputs**
  - ESI_Table 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 – 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 – DeleteProgramVersionNote

- **Business Functionality**
  - Deletes a note on the selected program version.
- **Inputs**
  - ESI_Program object
- **Outputs**
  - Returns a pass/fail value. Pass = true and Fail = false.

Program Items – DeleteTableRevisionNote

- **Business Functionality**
  - Deletes a note on the selected table revision.
- **Inputs**
  - ESI_Program object
  - ESI_Table object
- **Outputs**
  - Returns a pass/fail value. Pass = true and Fail = false.

Program Items – ExportTableRevisionData

- **Business Functionality**
  - Exports data from an existing table variable revision in tab delimited format to a default or named location.
- **Inputs**
  - ESI_ProgramVersion object
  - ESI_TableVersion object
- **Outputs**
  - Returns a tab delimited file.

Program Items – GetAvailableFolderGroups

- **Business Functionality**
  - Gets a list of Folders of a particular product.
- **Inputs**
  - ProductID
- **Outputs**
  - Returns a list of ESI_FolderGroup objects.

Program Items – GetAvailableFolderGroupsXML

- **Business Functionality**
  - Gets an XML string of available Folders of a particular product.
- **Inputs**
  - ProductID
- **Outputs**
  - Returns an XML string of available Folders of a specific product.

Program Items – GetProgramVersionNotes

- **Business Functionality**
  - Gets a list of notes on a selected program version.
- **Inputs**
  - ESI_Program object
- **Outputs**
  - Returns a list of notes for a specific program version.

Program Items – GetTableRevisionNotes

- **Business Functionality**
  - Gets a list of notes on a selected table revision.
- **Inputs**
  - ESI_Program object
  - ESI_Table object
- **Outputs**
  - Returns a list of notes for a specific table revision.

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 – 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.

Program Items – UpdateProgramVersionName

- **Business Functionality**
  - Adds or updates the program version name.
- **Inputs**
  - ESI_ProgramVersion
- **Outputs**
  - True if successful or exception if failed.

Program Items – UpdateProgramVersionNote

- **Business Functionality**
  - Updates a note on the selected program version.
- **Inputs**
  - ESI_Program object
- **Outputs**
  - Returns a pass/fail value. Pass = true and Fail = false.

Program Items – UpdateTableRevisionNote

- **Business Functionality**
  - Updates a note on the selected table revision.
- **Inputs**
  - ESI_Program object
  - ESI_Table object
- **Outputs**
  - Returns a pass/fail value. Pass = true and Fail = false.

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.

Program Versioning Data – InsertRow

- **Business Functionality**
  - Inserts a new row in program versioning data.
- **Inputs**
  - ProjectID
  - ProductID
  - ProgID
  - ProgVer
  - RowID
- **Outputs**
  - True if successful or exception if failed.

Program Versioning Data – InsertMultiRows

- **Business Functionality**
  - Inserts multiple rows in program versioning data.
- **Inputs**
  - ProjectID
  - ProductID
  - ProgID
  - ProgVer
  - RowID
- **Outputs**
  - True if successful or exception if failed.

Program Versioning Data – DeleteRow

- **Business Functionality**
  - Deletes a row in program versioning data.
- **Inputs**
  - ProjectID
  - ProductID
  - ProgID
  - ProgVer
  - RowID
- **Outputs**
  - True if successful or exception if failed.

Program Versioning Data – UpdateCell

- **Business Functionality**
  - Updates a cell value in program versioning data.
- **Inputs**
  - ProjectID
  - ProductID
  - ProgID
  - ProgVer
  - RowID
  - ColumnID
- **Outputs**
  - True if successful or exception if failed.

NOTE: *Versioning Criteria must be in place to view changes in cell values.*

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.

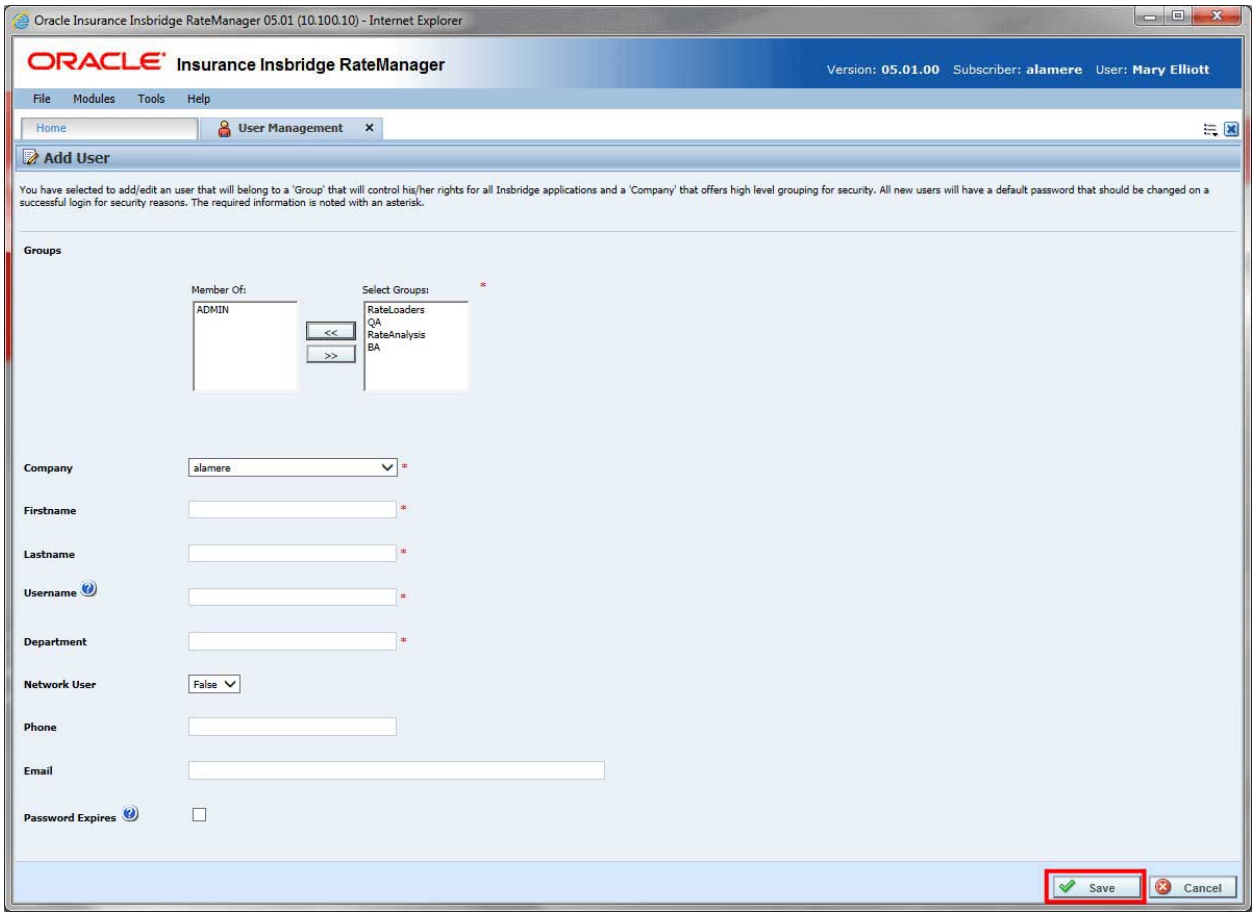


Figure 1 Adding a New User

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.

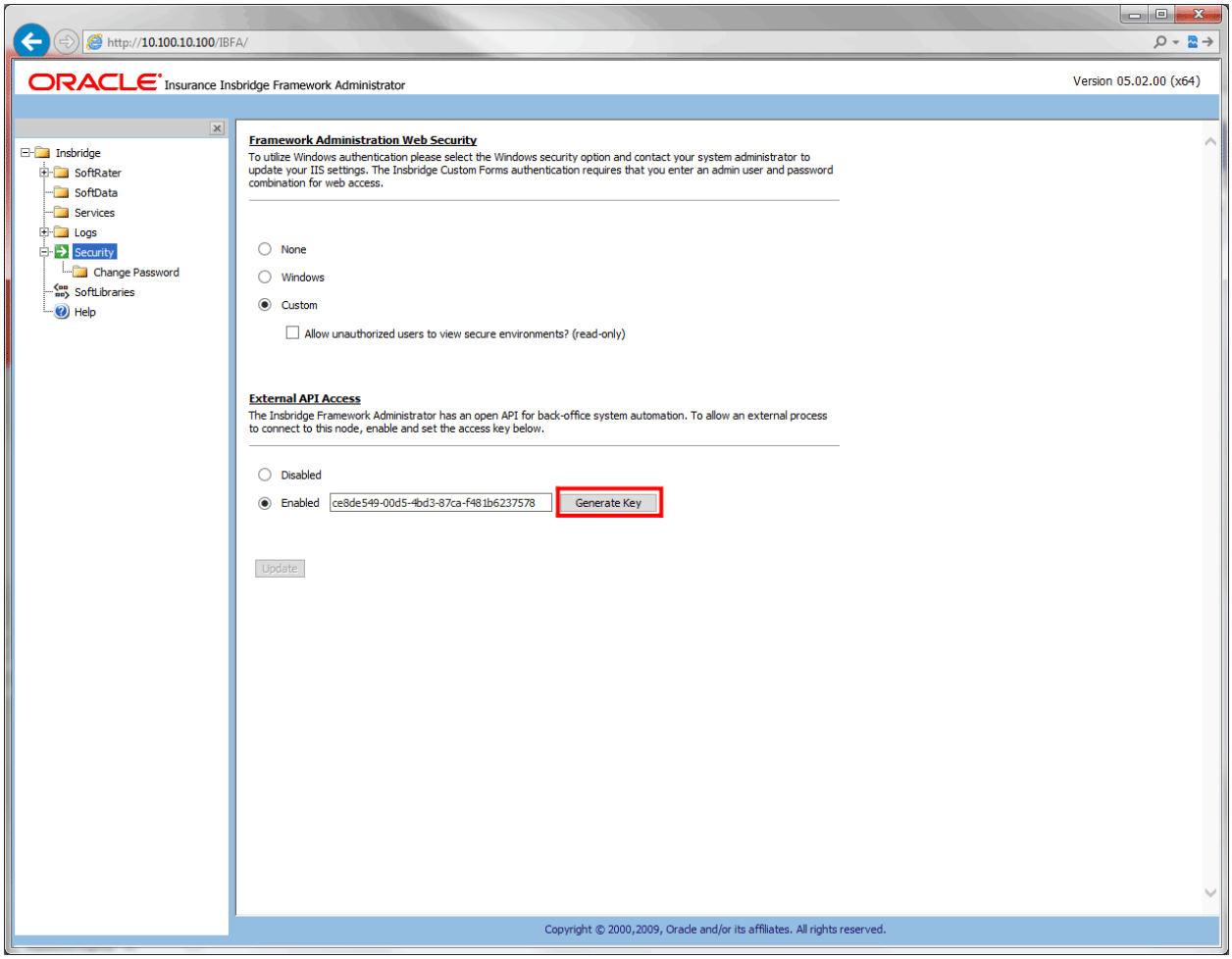


Figure 2 Allowing External API Access

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, right click the ESI_Tester.exe and select Open.

RM FEATURES/METHODS

- Test Security
- Test Globals/Universals
- Test Program Items
- Test IBFA
- Test Releases
- Test List Items
- Test Versioning Data

Login

A RateManager user ID and password can be used or a network login can be used. The RateManager service defaults to localhost and the first subscriber found in the Insbridge config file. This information can be updated.

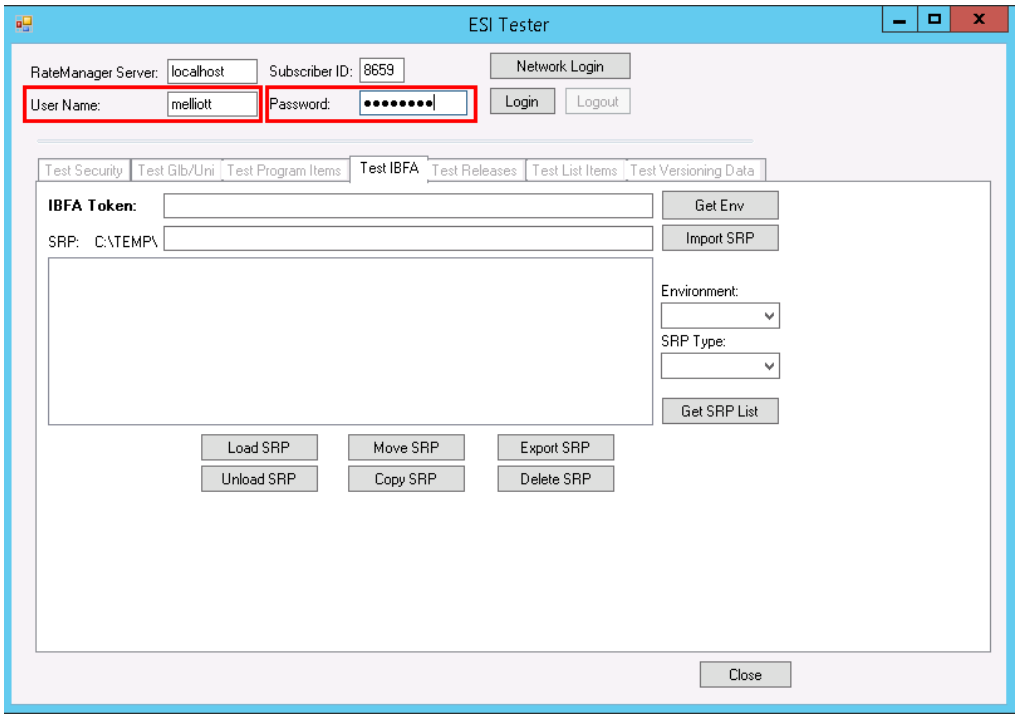


Figure 3 Logging Into ESI

Test Security

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

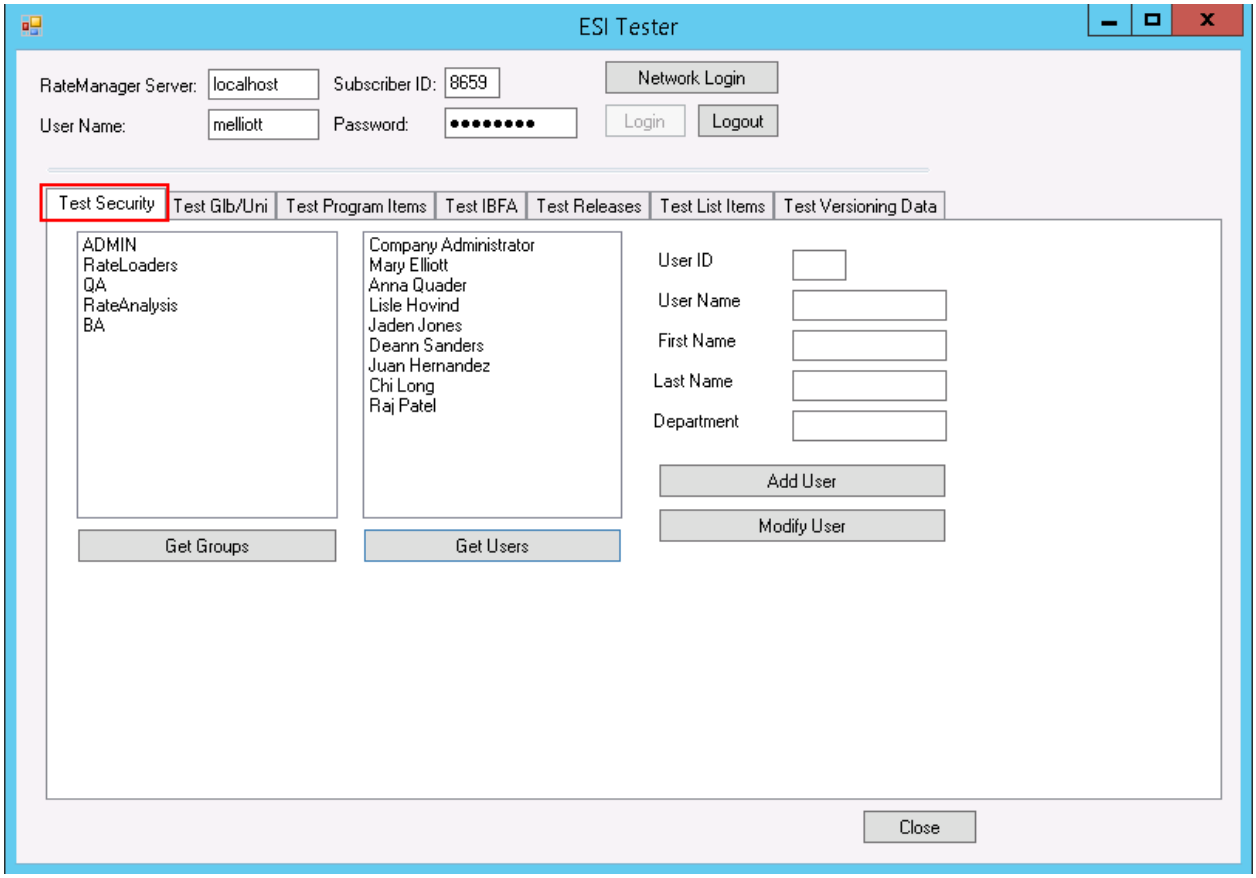


Figure 4 Test Security

- 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

NOTE: *The Close option at the bottom of the ESI window closes the ESI tester. To navigate, click the tab where you want to test.*

Test Globals/Universals

Allows for the adding, editing and deleting of Products, Categories, and Fields at the global or universal level.

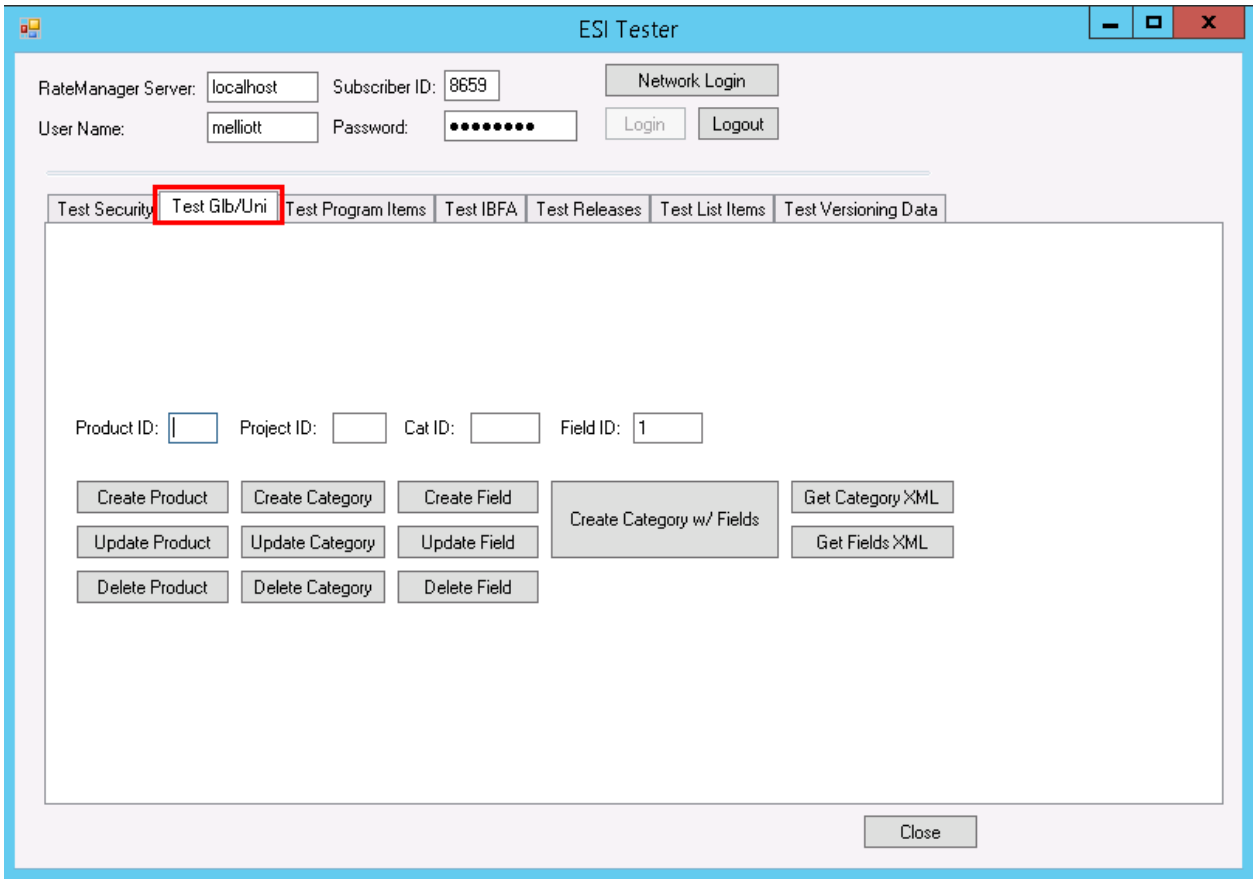


Figure 5 Test Global/Universals

Get requests require a Project ID.

- Get Category XML returns the details of the categories in the selected project.
- Get Fields XML returns the details of the fields in the selected project.

NOTE: *The ESI tester does create users and other items, some of the values used are place holders that can be edited in RateManager if needed.*

Test Program Items

Allows for viewing, adding, editing, copying and deleting of program items. Also allows for the exporting of table variable data.

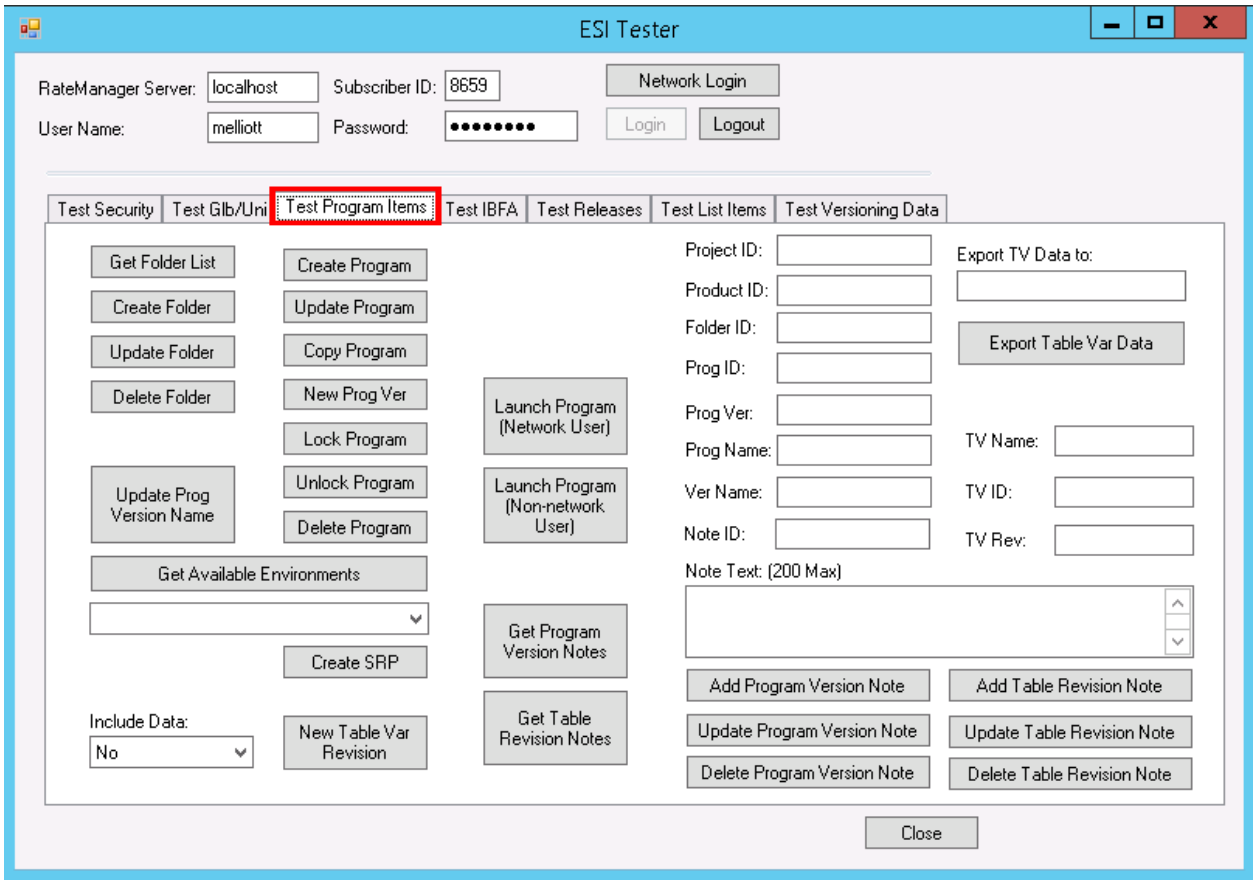


Figure 6 Test Program Items

- Get Available Environments returns the environments available. The list is populated drop down.
- Get Folder List requires a Product ID and returns a list of folder IDs in the Project.
- Get Program Version Notes returns notes for a specific program.
- Get Table Revision Notes returns the notes for a specific Table in a specific Project.
- Export Table Var Data exports data from the specified table revision in tab delimited format to a default or named location. The location can be specified in the Export TV Data to: field.
- Launch Program (Network User) launches RateManager for users with network login credentials.
- Launch Program (Non-network User) launches RateManager for users not using network login credentials.

Test IBFA

Allows for SRPs to be managed.

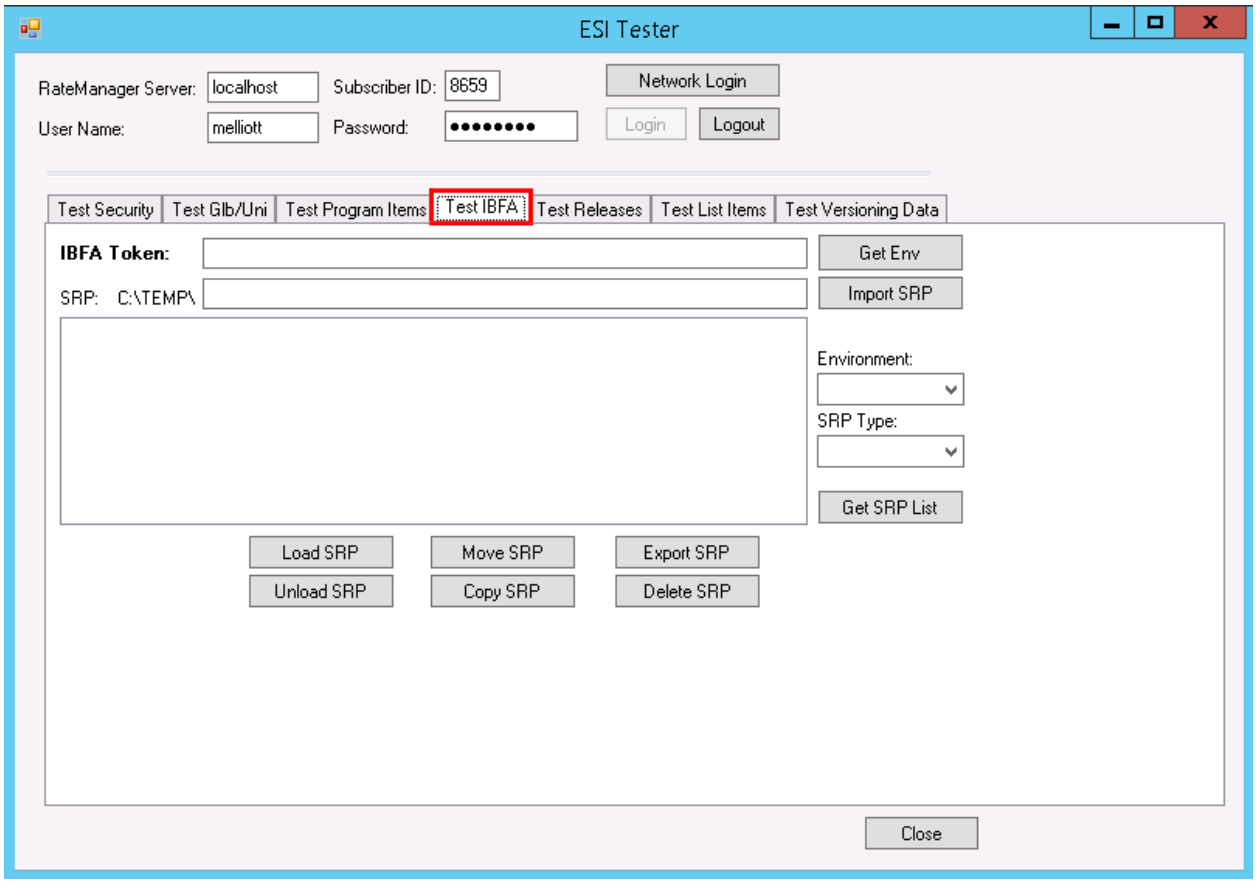


Figure 7 Test IBFA

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

Test Releases

Allows for the management of releases.

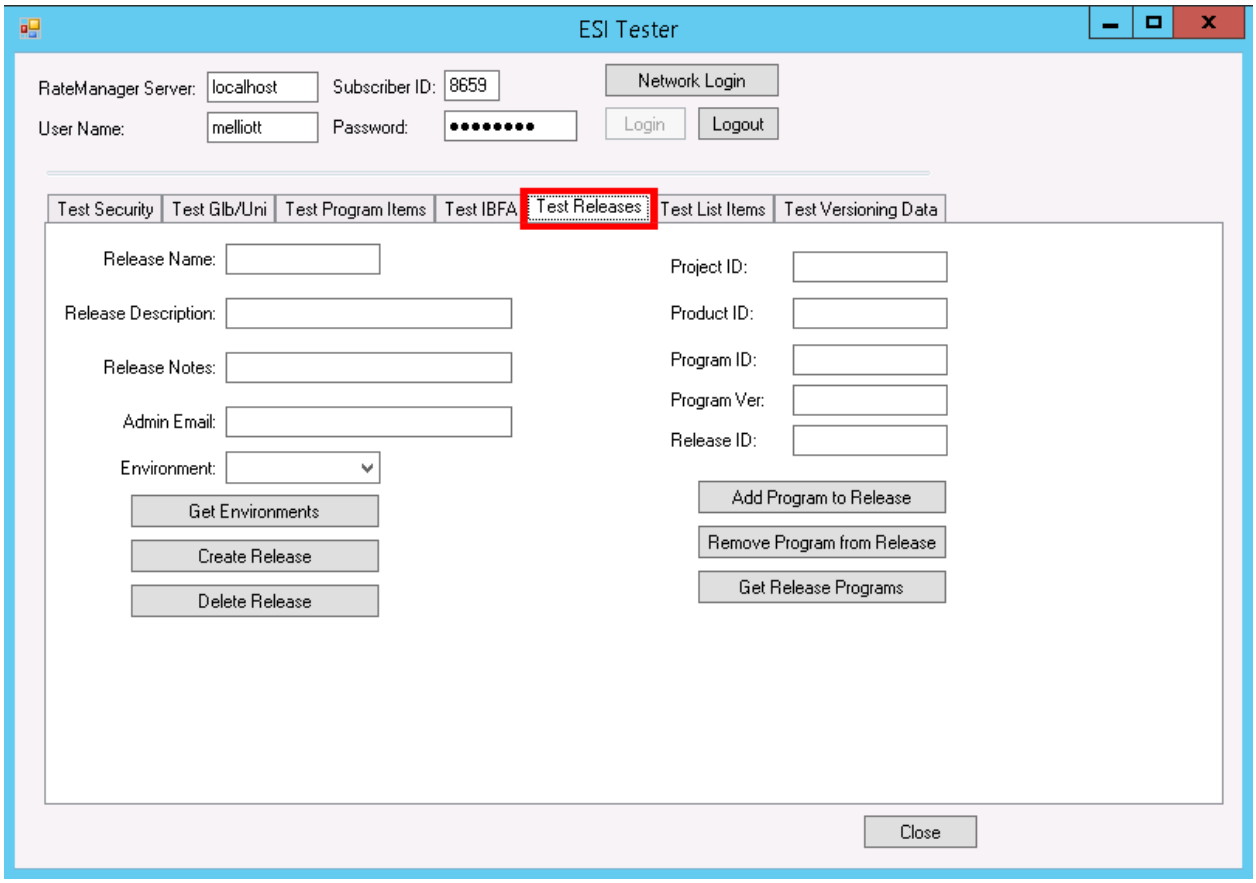


Figure 8 Test Releases

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

Test List Items

- Return a list all active products
- Return a list of domains
- Return a list of projects for a domain
- Return a list of products for a particular project
- Return a list of folders for a particular product
- Return a list of sub folders for a particular folder
- Return a list of programs for a folder
- Return a list of program versions for a particular program
- Return the XML for the program version report for a particular program version
- Return the location of a program version report

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.

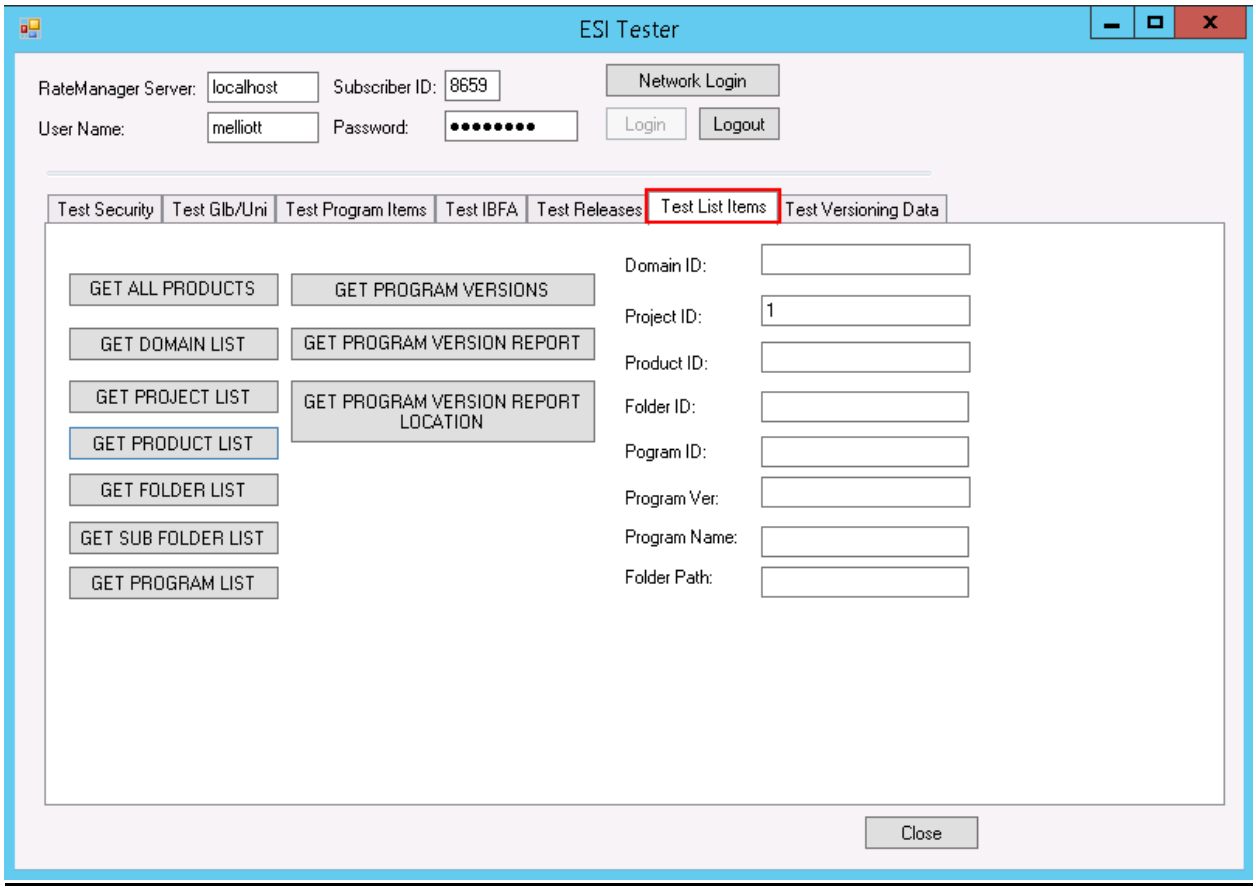


Figure 9 Java ESI Tester for RM

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 ALL PRODUCTS

- **Input:** No input is required.
- **GET ALL PRODUCTS:** Returns an XML string of all active products.
- **Output:** Returns an XML string of available Products. XML string has:
  - PRODUCT_NAME
  - PRODUCT_ID
  - ACTIVE attributes
  - DATE MASK

GET DOMAIN LIST

- **Input:** No input is required.
- **GET DOMAIN LIST:** Returns an XML string of all domains.
- **Output:** Returns an XML string of available domains. XML string has:
  - DOMAIN_NAME
  - DOMAIN_ID

GET PROJECT LIST

- **Inputs:** Domain ID.
- **GET PROJECT LIST:** Gets an XML string of available projects within the domain ID.
- **Outputs:** Returns an XML string that includes all the projects of that domain. XML string has:
  - PROJECT_NAME
  - PROJECT_ID
  - DATE_LAST_MODIFIED

GET PRODUCT LIST

- **Inputs:** Project ID.
- **GET PROJECT LIST:** Gets an XML string of available products within the project ID.

- **Outputs:** Returns an XML string that includes all the products of that project. XML string has:

  - PRODUCT_NAME
  - PRODUCT_ID
  - DATE_MASK
  - CULTURE
  - DECIMAL_SYMBOL
  - GROUP_SMBOL
  - ABBR (Abbreviation used)

GET FOLDER LIST

- **Inputs:** Project ID and Product ID.
- **GET FOLDER LIST:** Gets an XML string of available folders of a particular product.
- **Outputs:** Returns the XML string that includes all the folders of that product. XML String has:

  - PROJECT_ID
  - PRODUCT_ID
  - FOLDER_ID
  - FOLDER_ NAME

GET SUB FOLDER LIST

- **Inputs:** Project ID, Product ID and Folder ID.
- **GET SUB FOLDER LIST:** Gets an XML string of available sub folders of a particular product folder/ folder.
- **Outputs:** Returns an xml string that includes all the sub folders of that product Folder/Folder. XML string has

  - PPROJECT_ID
  - PRODUCT_ID
  - FOLDER_ID
  - FOLDER_ NAME
  - FOLDER_PARENT_ID

GET PROGRAM LIST

- **Inputs:** Project ID, Product 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:

  - PROJECT_ID
  - PRODUCT_ID

- FOLDER_ID
- PROGRAM_ ID
- PROGRAM_ NAME

GET PROGRAM VERSIONS LIST

- **Inputs:** Project ID, Product 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:

- PROJECT_ID
- PRODUCT_ID
- FOLDER_ID
- PROGRAM_ ID
- VERSION

GET PROGRAM VERSION REPORT

- **Inputs:** Project ID, Product ID, Folder ID, Program ID, Program Ver and Program Name.
- **GET PROGRAM VER REPORT:** 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:** Project ID, Product 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.

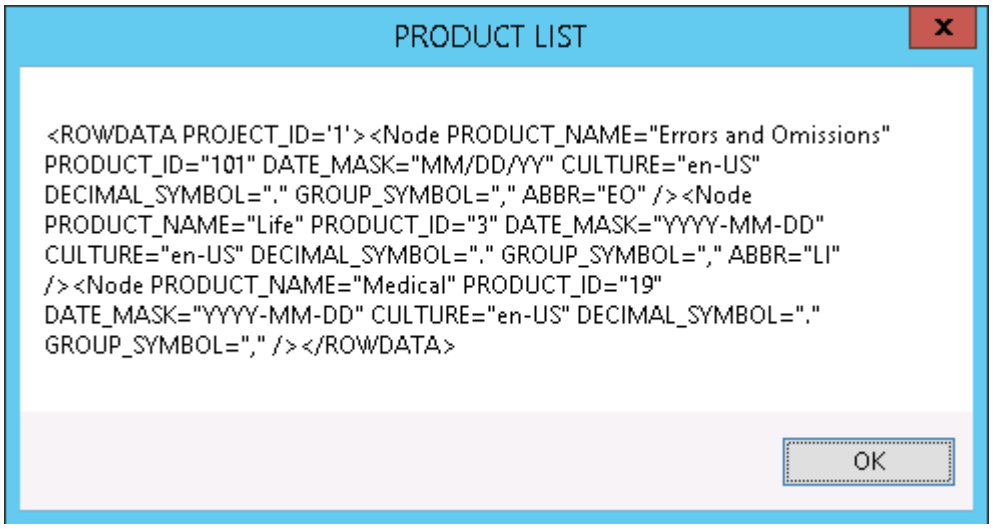


Figure 10 Tester Output

Test Versioning Data

Allows for the testing of program versioning data.

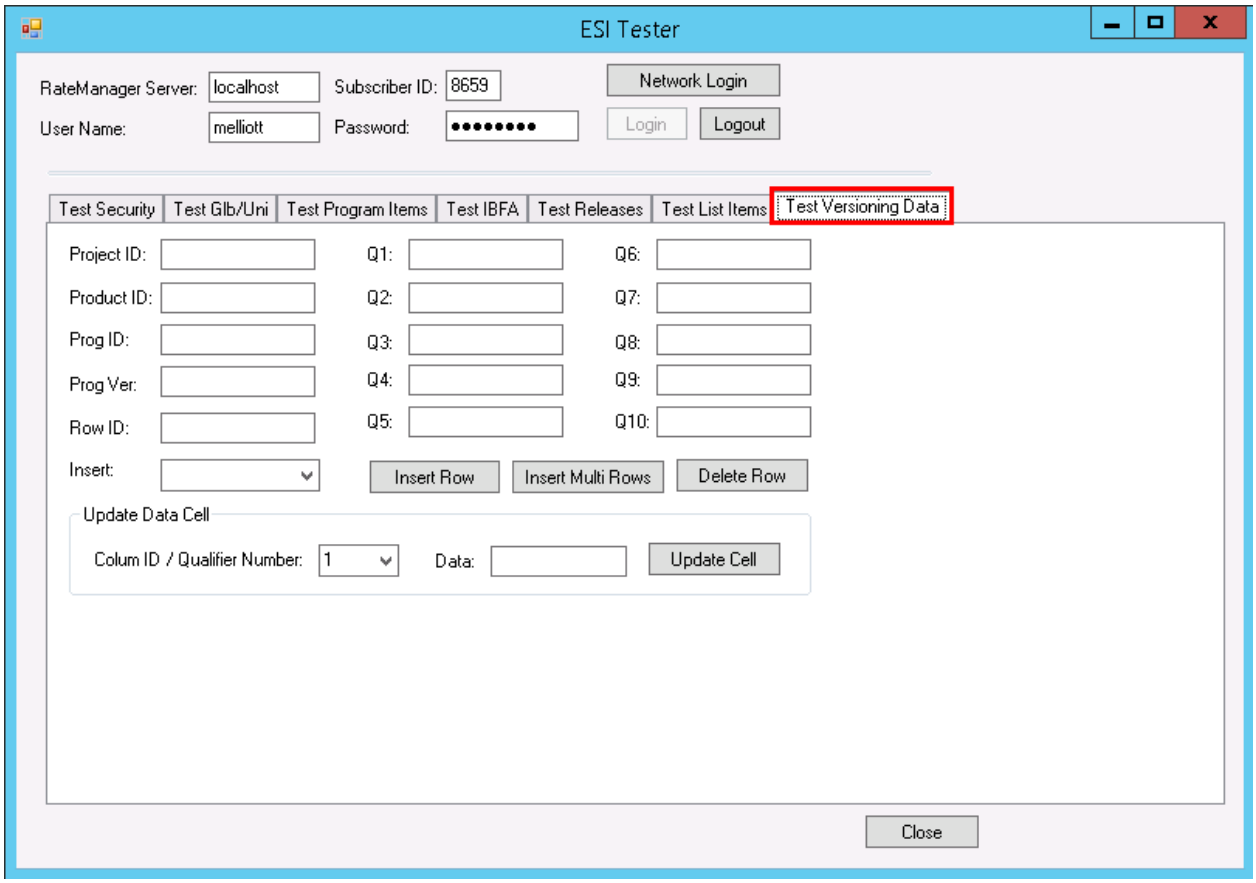


Figure 11 Test Versioning Data

Up to 10 qualifiers can be entered.

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:

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Redwood Shores, CA 94065
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Worldwide Inquiries:
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