

**Oracle Insurance**

**Insbridge Enterprise  
Rating**

**ESI for Windows User  
Guide**

Release 5.5

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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 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
<b>bold</b>	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.
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

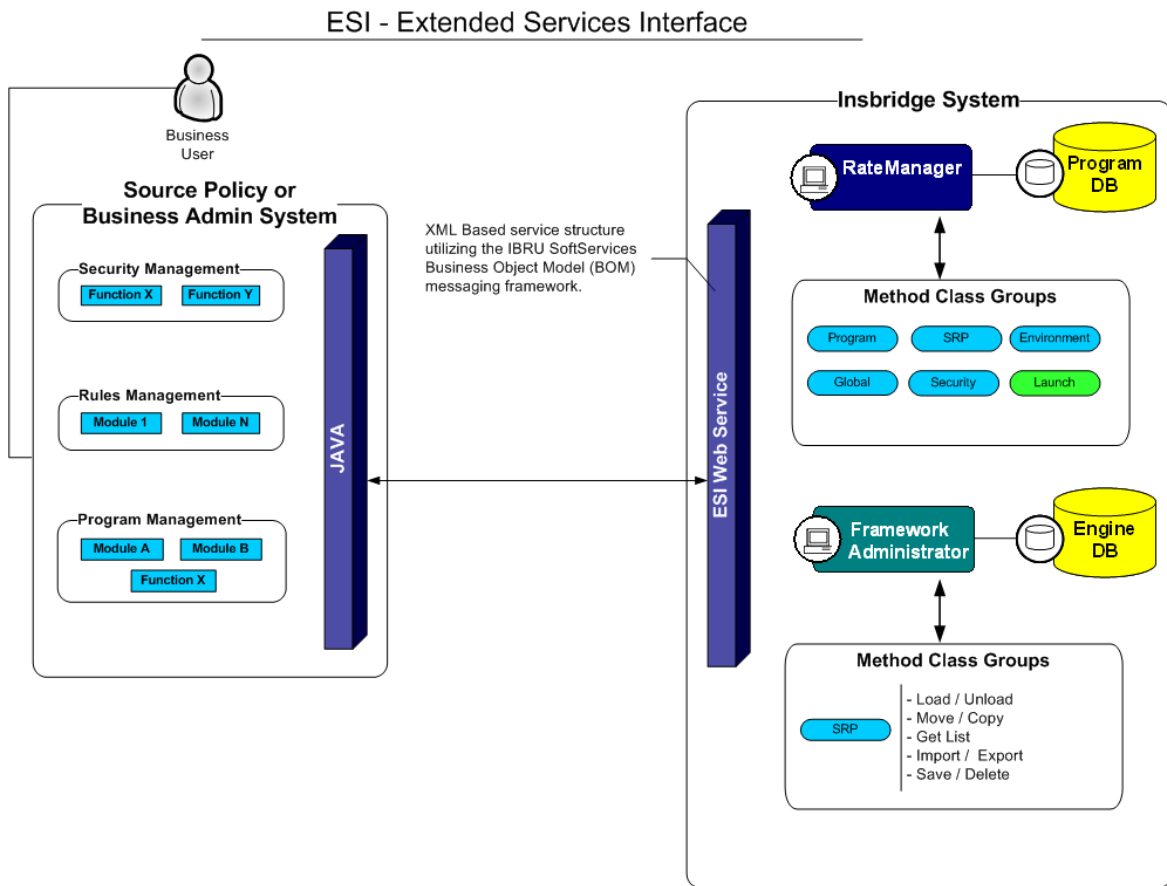
New editions incorporate any updates issued since the previous edition.

<b>Edition</b>	<b>Publication Number</b>	<b>Product Version</b>	<b>Publication Date</b>	<b>Comment</b>
1 <sup>st</sup> Edition	P01-767-01	V 3.11.01	December 2008	Initial release
2 <sup>nd</sup> Edition	P01-767-02	V 3.12.00	July 2009	Update Version
3 <sup>rd</sup> Edition	P01-767-03	V 3.13.00	December 2009	Update Version
4 <sup>th</sup> Edition	P01-767-04	R 4.0	April 2010	Update Release
5 <sup>th</sup> Edition	P01-767-05	R 4.0.1	August 2010	Update Release
6 <sup>th</sup> Edition	P01-767-06	R 4.1	December 2010	Update Release
7 <sup>th</sup> Edition	P01-767-07	R 4.5	May 2011	Update Release
8 <sup>th</sup> Edition	P01-767-08	R 4.5.1	September 2011	Update Release
9 <sup>th</sup> Edition	P01-767-09	R 4.6	May 2012	Update Release
10 <sup>th</sup> Edition	P01-767-10	R 4.6.1	November 2012	Update Release
11 <sup>th</sup> Edition	P01-767-11	R 4.7	September 2013	Update Release
12 <sup>th</sup> Edition	P01-767-12	R 4.7.1	November 2013	Update
13 <sup>th</sup> Edition	P01-767-13	R 4.8	August 2014	Update
14 <sup>th</sup> Edition	P01-767-14	R 4.9	December 2014	Update
15 <sup>th</sup> Edition	P01-767-15	R 5.1	December 2015	Update
16 <sup>th</sup> Edition	P01-767-16	R 5.2	July 2016	Update
17 <sup>th</sup> Edition	P01-767-17	R 5.3	October 2016	Update
18 <sup>th</sup> Edition	P01-767-18	R 5.4	January 2017	Update
19 <sup>th</sup> Edition	P01-767-19	R 5.5	September 2017	Update



# 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.

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## Chapter 2

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### **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
<b>General – Open URL</b>		
Create Launch Definition – using a Network login	<u>General – CreateLauchDefinition (Selected Version, Network Login)</u>	Method returns a URL for a selected program version using a network login.
Create Launch Definition – using a Network login	<u>General – CreateLauchDefinition (First Version, Network Login)</u>	Method returns a URL for the first program version using a network login.
Create Launch Definition – using a RateManager login	<u>General – CreateLauchDefinition (Selected Version, RateManager Login)</u>	Method returns a URL for a selected program version using a RateManager login.
Create Launch Definition – using a RateManager login	<u>General – CreateLauchDefinition (First Version, RateManager Login)</u>	Method returns a URL for the first program version using a RateManager login.
<b>Security Items</b>		
Add	<u>Security Items – CreateUser</u>	Creates a new user.
List	<u>Security 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.
<b>Global/Universal Items</b>		
Add	<u>Global Items – CreateField</u>	Creates a new field.
Add	<u>Global Items – CreateCategory</u>	Creates a new category.
Add	<u>Global Items – CreateCategory with Fields</u>	Creates a new category that includes fields.

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

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



# 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\_Environment 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.*

---

# 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.

# 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.

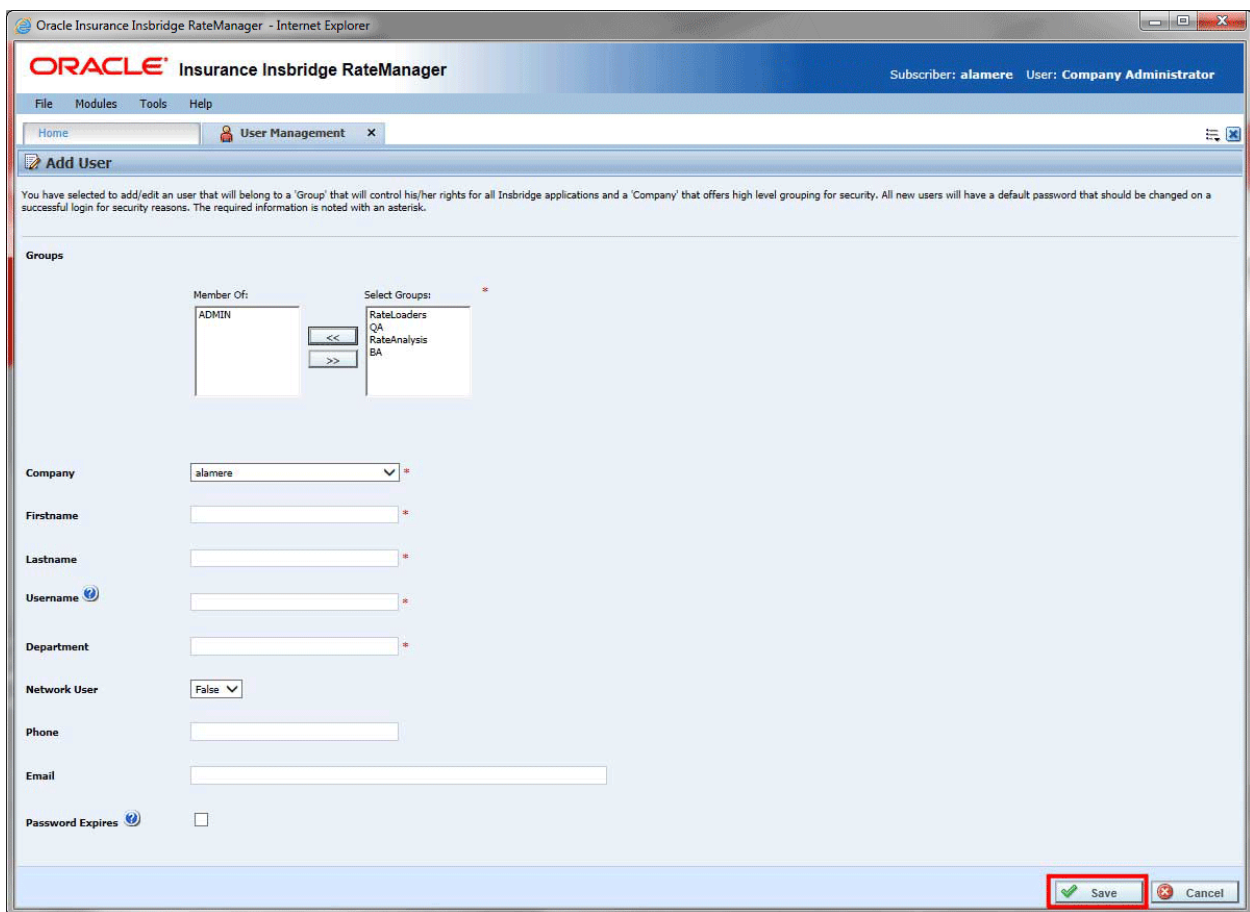


Figure 1 Adding a New User

## 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.

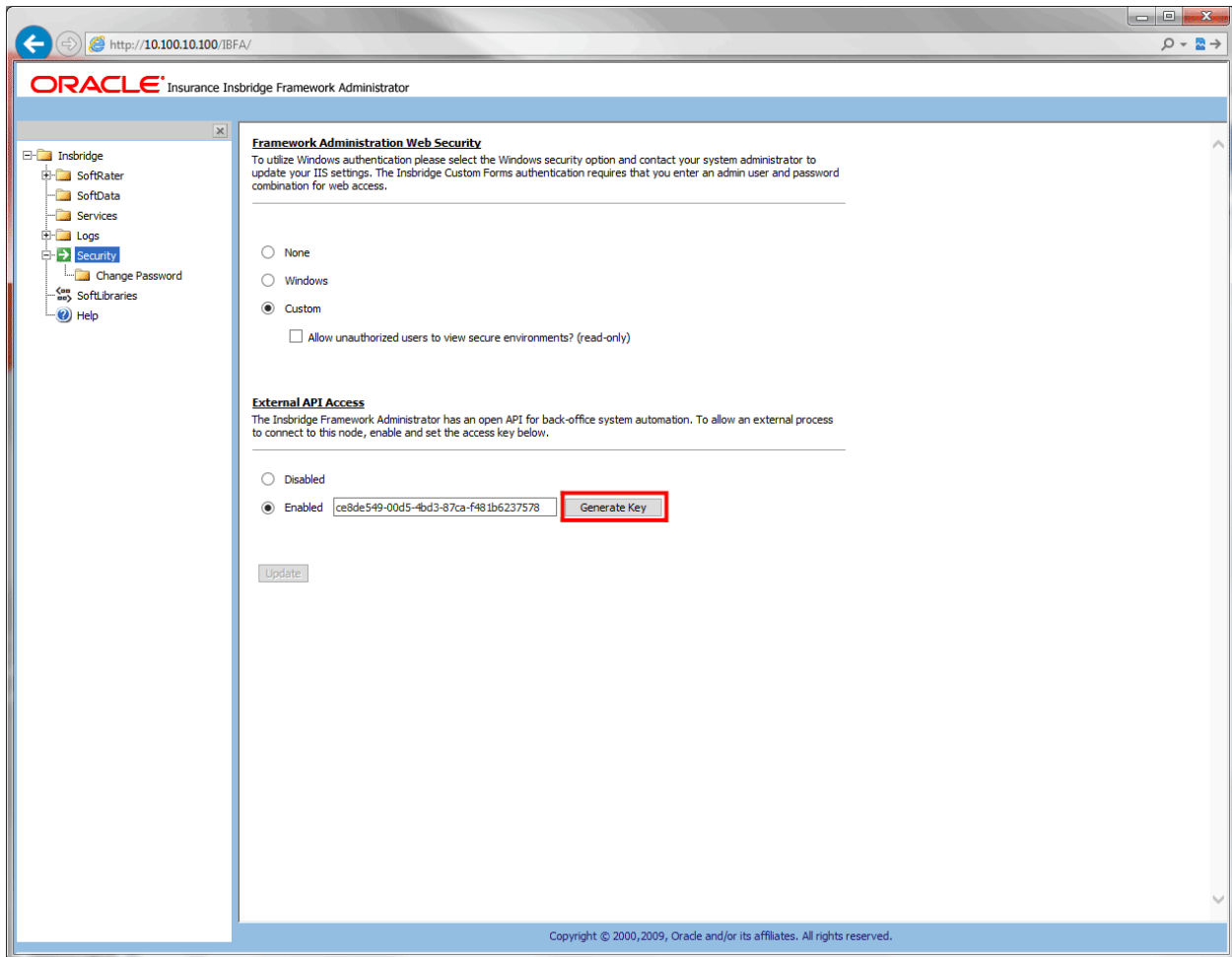


Figure 2 Allowing External API Access

# 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.

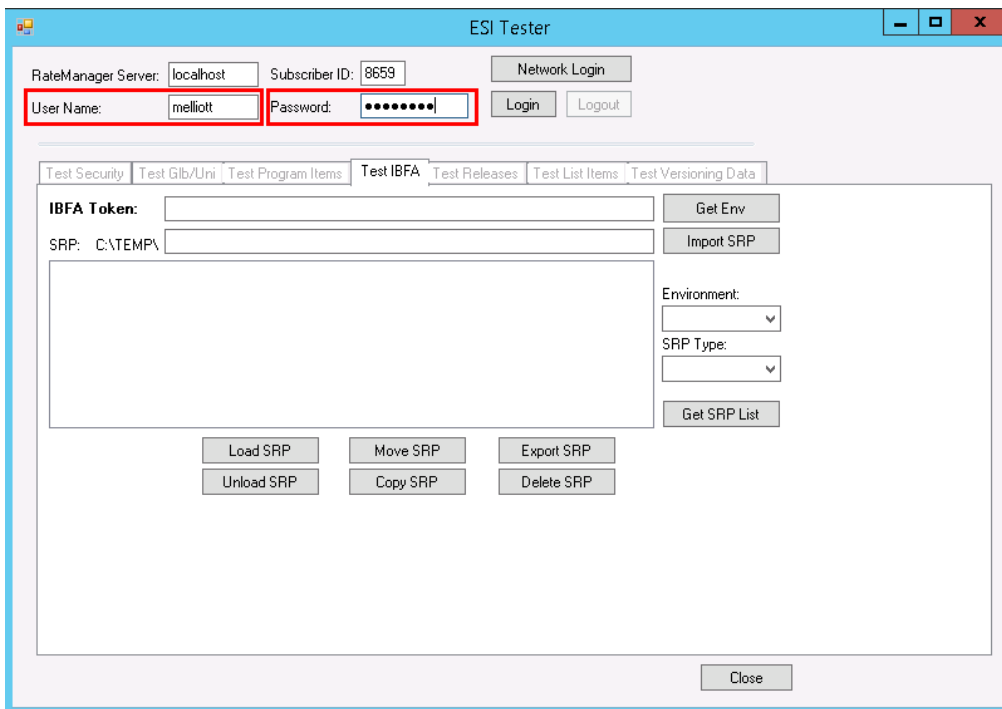


Figure 3 Logging Into ESI

## Test Security

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

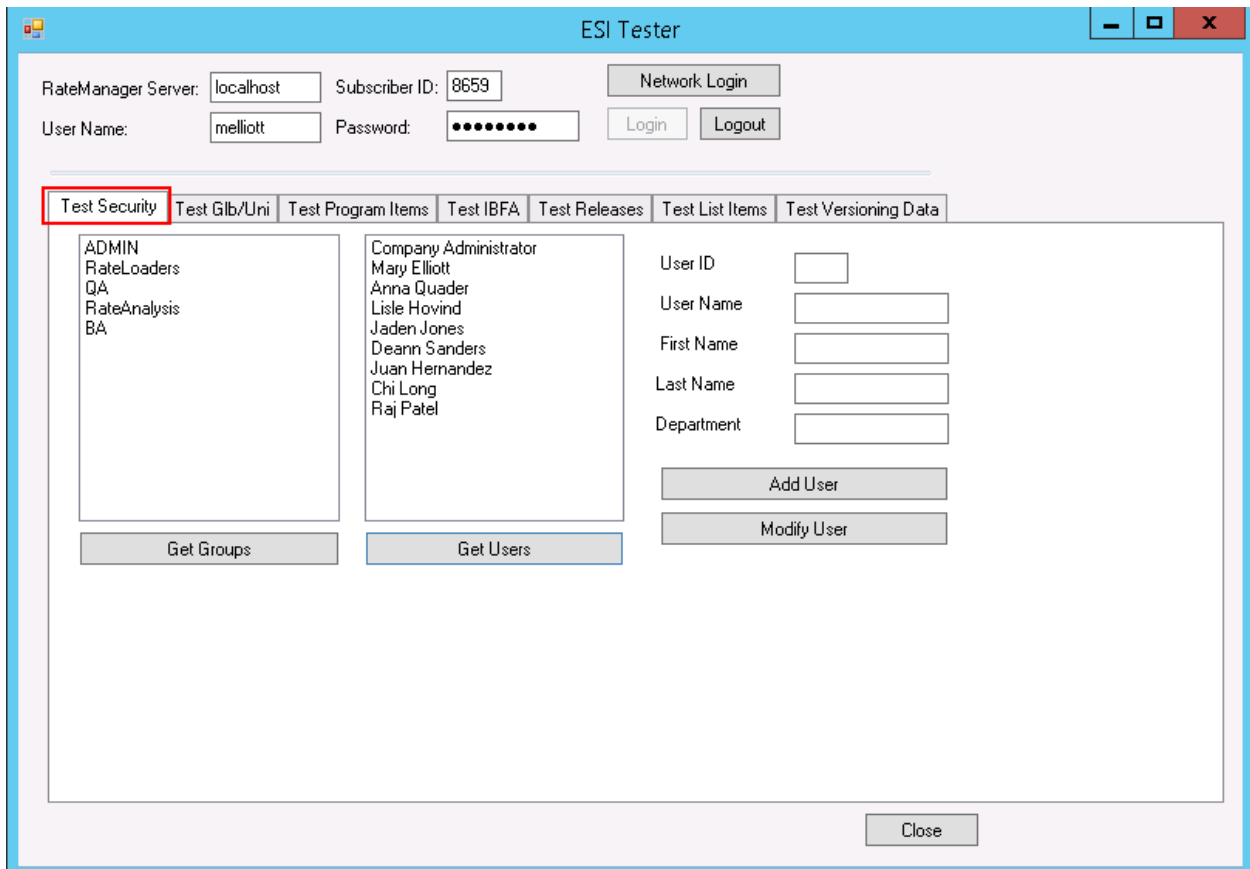


Figure 4 Test Security

- 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.

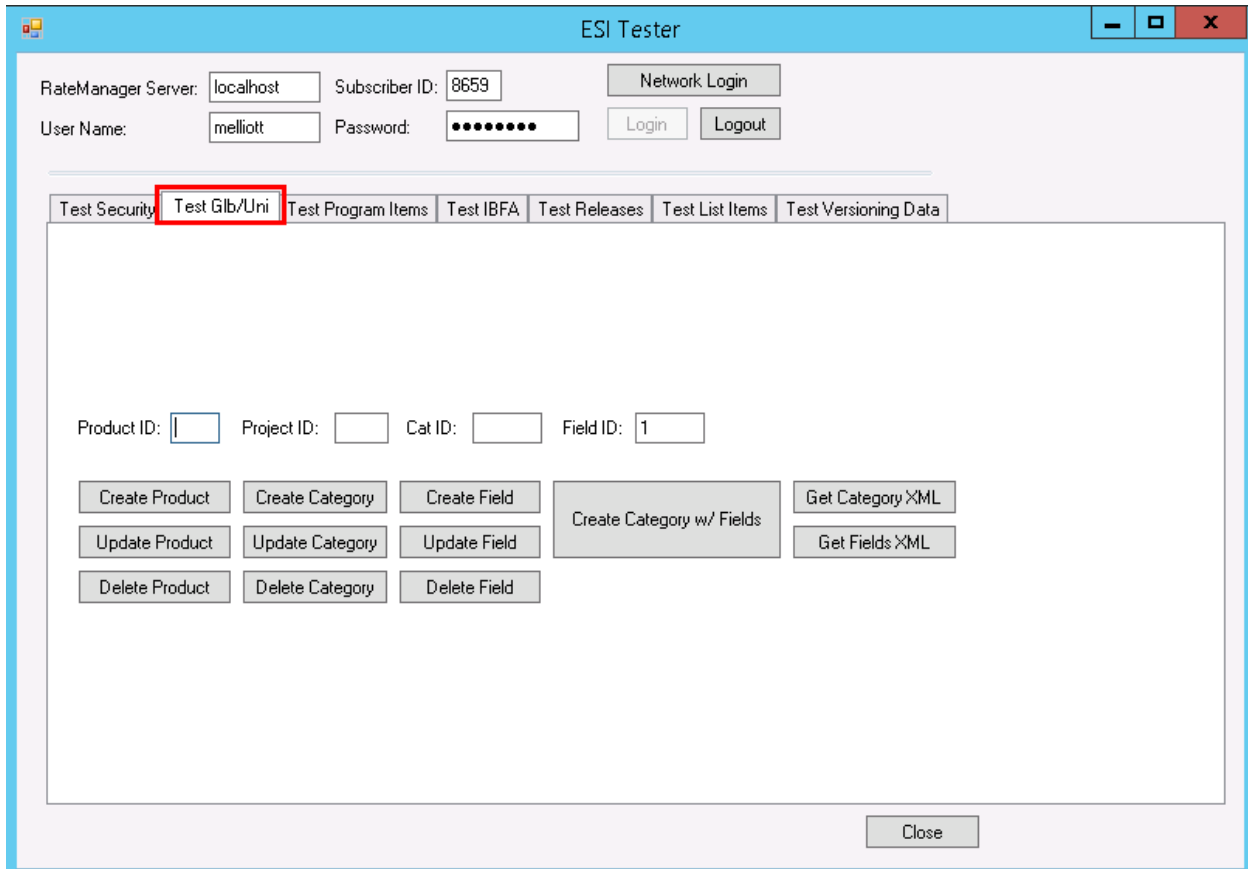


Figure 5 Test Global/Universals

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.

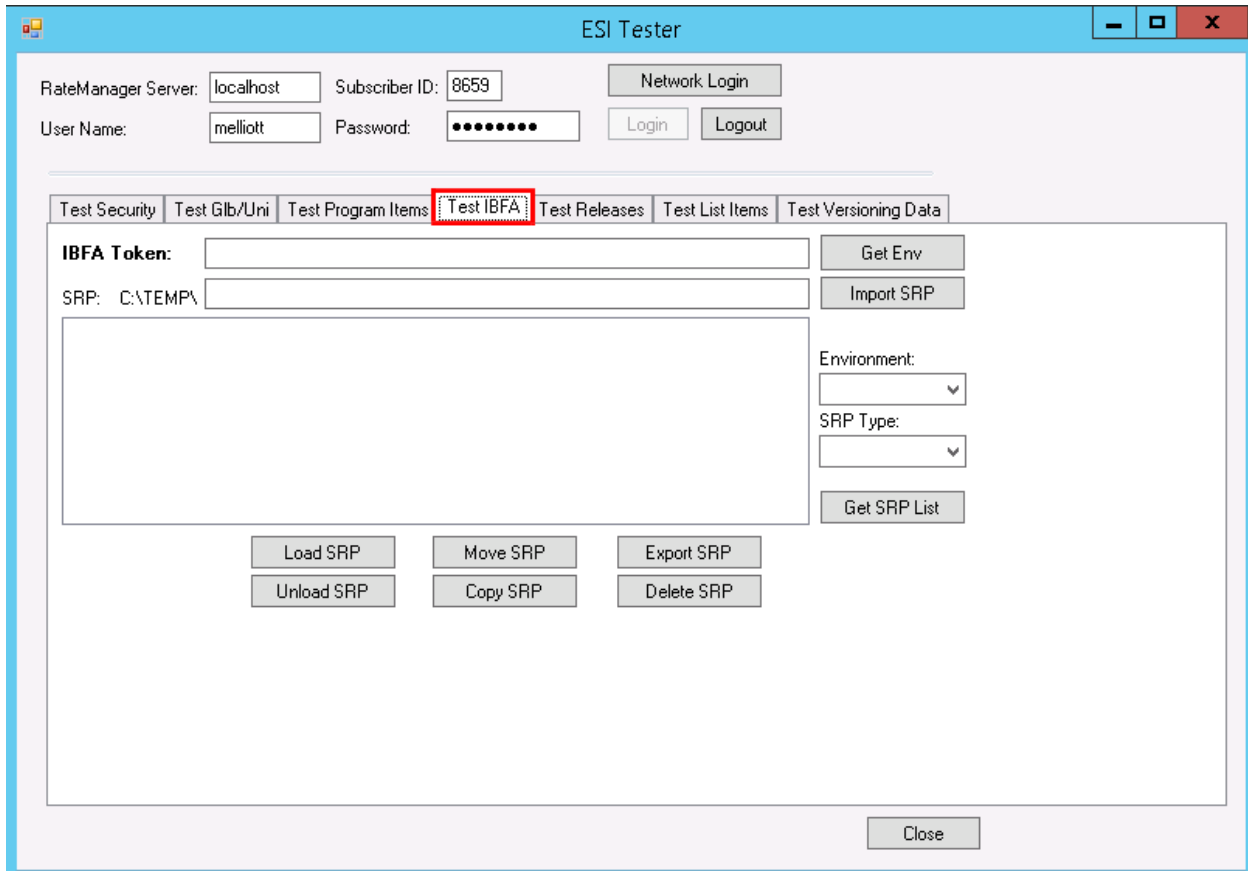


Figure 7 Test IBFA

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

## Test Releases

Allows for the management of releases.

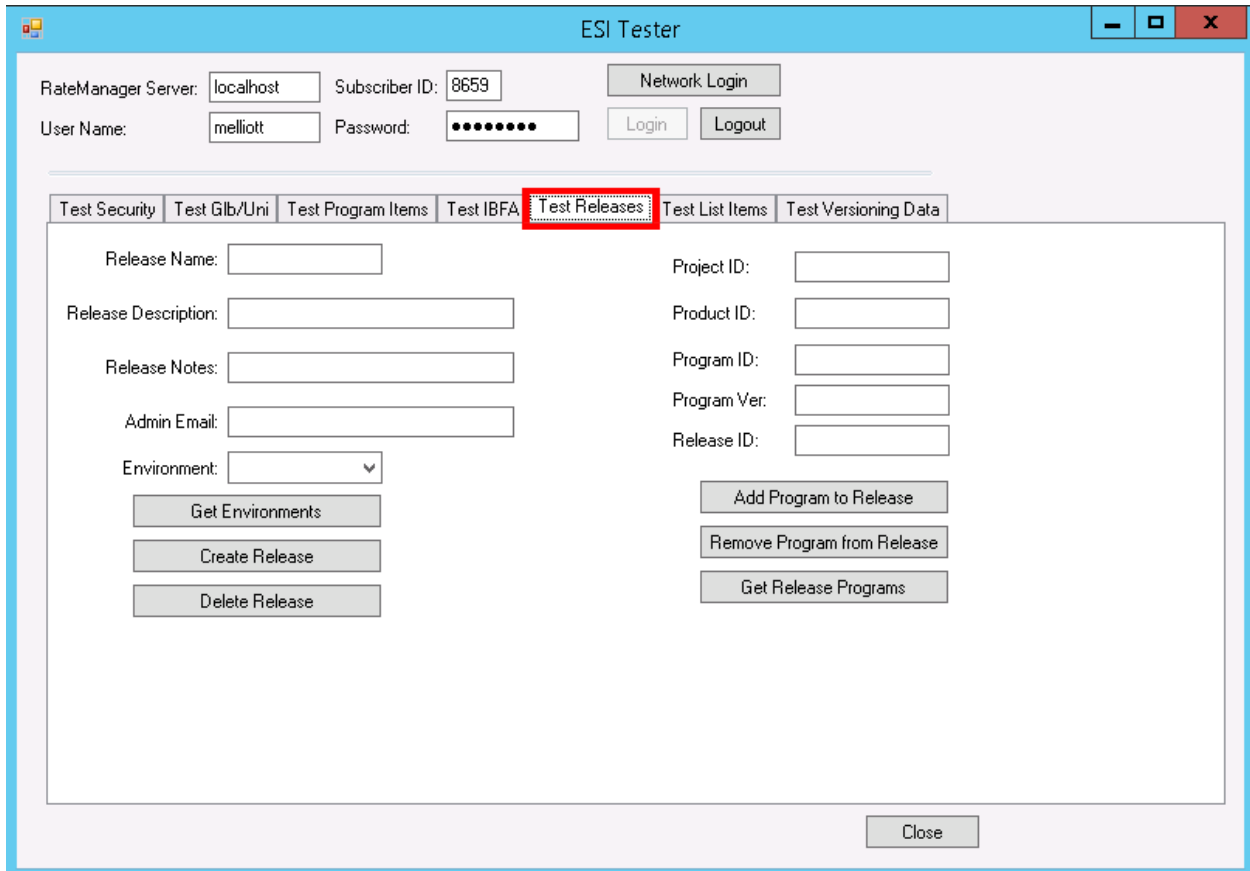


Figure 8 Test Releases

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.

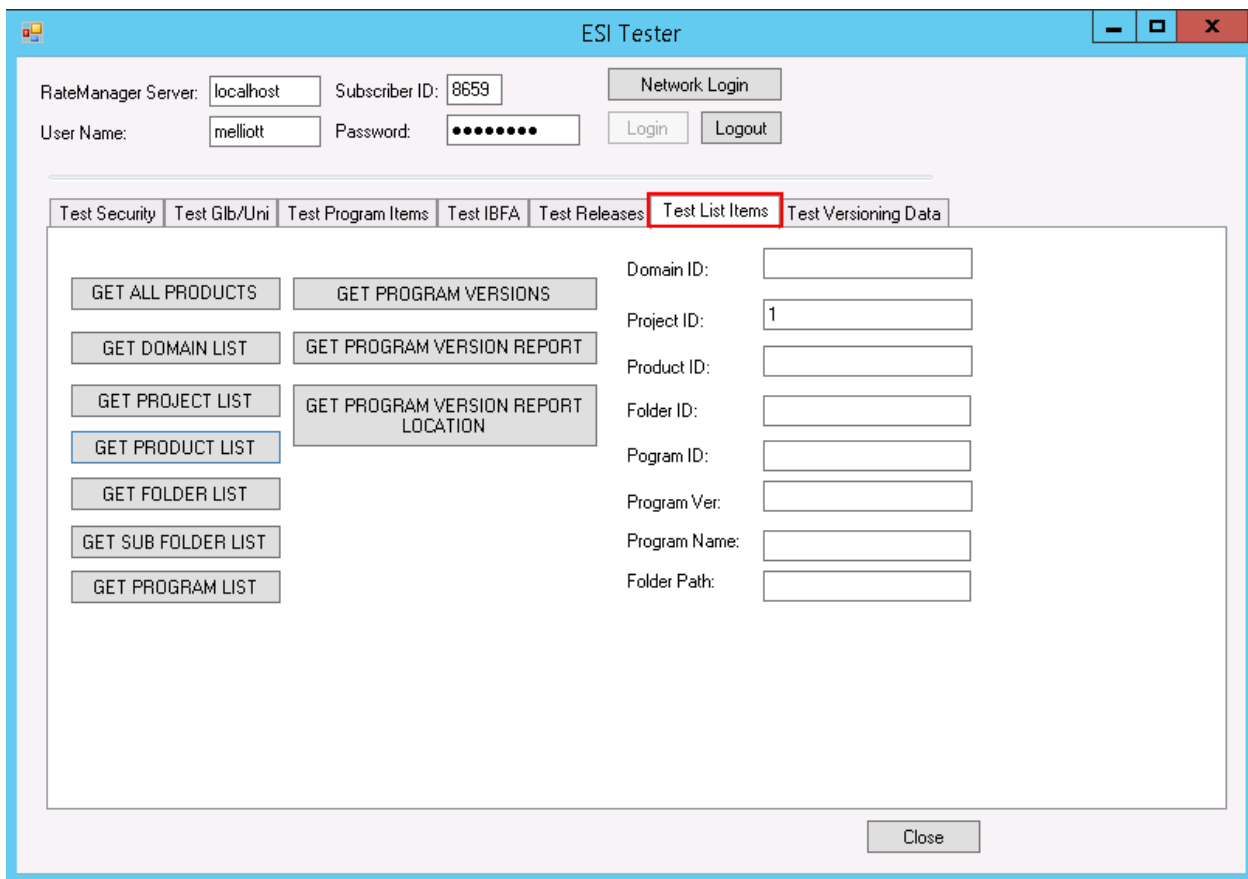


Figure 9 Java ESI Tester for RM

## 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\_SYMBOL
  - 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.



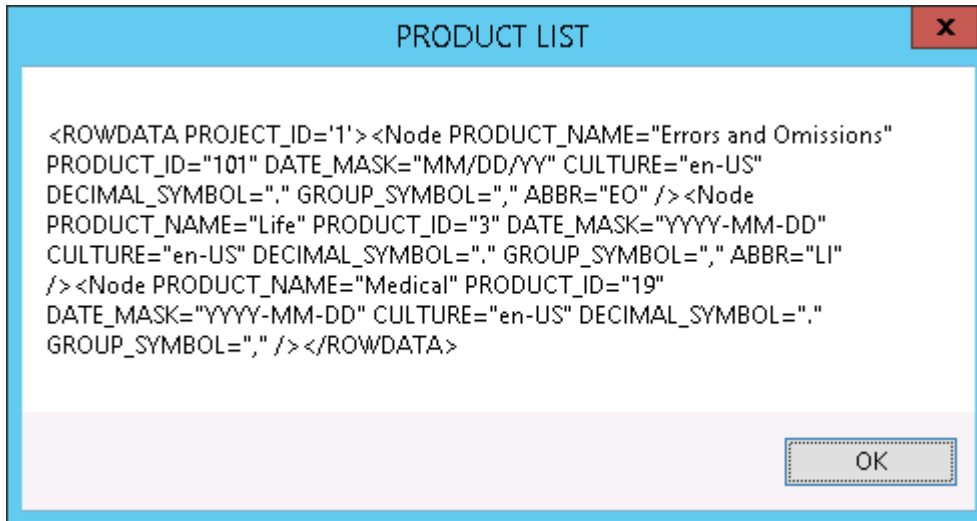


Figure 10 Tester Output

## Test Versioning Data

Allows for the testing of program versioning data.

The screenshot shows the ESI Tester application window with the following elements:

- RateManager Server: localhost
- Subscriber ID: 8659
- User Name: mellott
- Password: [masked]
- Buttons: Network Login, Login, Logout
- Navigation tabs: Test Security, Test Glb/Uni, Test Program Items, Test IBFA, Test Releases, Test List Items, **Test Versioning Data** (highlighted)
- Form fields for data entry:
  - Project ID: [ ]
  - Product ID: [ ]
  - Prog ID: [ ]
  - Prog Ver: [ ]
  - Row ID: [ ]
  - Qualifiers: Q1: [ ], Q2: [ ], Q3: [ ], Q4: [ ], Q5: [ ], Q6: [ ], Q7: [ ], Q8: [ ], Q9: [ ], Q10: [ ]
- Buttons: Insert (dropdown), Insert Row, Insert Multi Rows, Delete Row
- Update Data Cell section:
  - Column ID / Qualifier Number: 1 (dropdown)
  - Data: [ ]
  - Update Cell button
- Close button at the bottom right.

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/>.

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