Oracle Insurance Data Gateway

User Interface Guide

Version 1.0

Oracle Insurance Data Gateway User Interface Guide

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Contents

PREFACE

Welcome to the Oracle Insurance Data Gateway (OIDG) user guide. This guide discusses about OIDG portal and its applications that includes following:

- Logging in OIDG portal and its applications
- Terminologies
- AdminView user interface
  - Configuring environments, parties and endpoints
  - Associating business services to parties and endpoints
  - Setting up system and custom properties
  - Viewing Partner Config XML
- QuickView user interface
  - Configuring batches and web services transactions
  - Resubmitting failed transactions

Audience

This guide is intended for OIDG portal users.

Reference Document

Please refer to the following documents for more information on OIDG installation and builds.

- OIDG Installation Guide
- OIDG Security Administration User Guide
- You can view these guides online at: http://www.oracle.com/technetwork/documentation/insurance-097481.html

Supported Browsers

OIDG portal and its applications work with Google Chrome Version 61.0.3163.100 or higher, and Microsoft IE 11. Please be aware that Mozilla Firefox, MacOS Safari and Microsoft Edge may not function as intended.

Conventions

The following text conventions are used in this document:

Convention	Description
bold	Boldface type indicates key information regarding the subject
Italic	Italic type indicates book titles, reference materials, emphasis or placeholders
`Monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples

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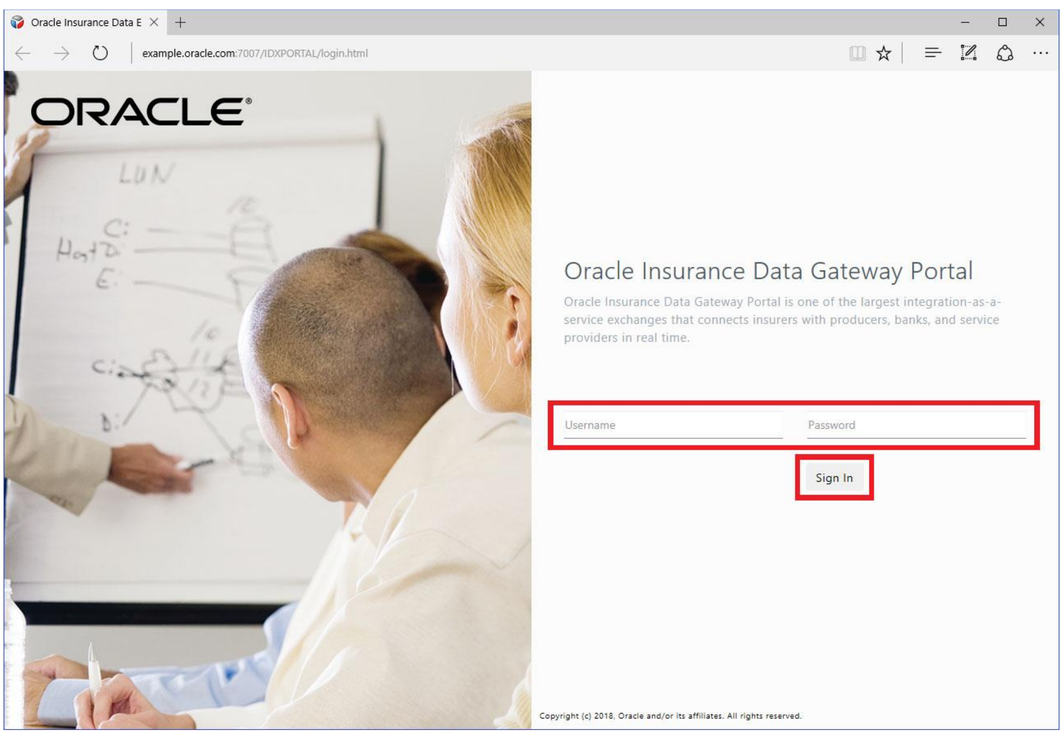
OIDG PORTAL

The Oracle Insurance Data Gateway (OIDG) Portal is a web-based solution providing access to OIDG component applications such as AdminView and QuickView and supporting platform applications such as WebLogic and Scheduler. Portal serves as a single launch pad from which you can access all the component and supporting platform applications needed to manage and run OIDG.

Portal utilizes single sign on for OIDG components, AdminView and QuickView. After you sign in to the portal, you are automatically logged in to the OIDG components applications. When you click the QuickView link from the portal, the QuickView application will open. If you do not have permissions, you may receive a message saying you do not have the appropriate access rights. Some platform applications require credentials to be entered.

OIDG Portal has three tabs: Administration, Applications and Manage. Each tab has unique actions or links. Access to each tab is based on the role you have been granted by your OIDG admin. If access has been granted, you will be able to enter the tab, otherwise the tab is grayed out.

Access to a tab does not guarantee access to the applications on that tab. For example, access to the Administration tab does not automatically grant access to WebLogic. Clicking the WebLogic link will place you on the login page. Using your portal credentials to log in to WebLogic may result in an error message stating you do not have the necessary permissions.



Roles include user, portal administrator, system administrator, and WebLogic administrator. A user has access to the Application tab, which contains a link to QuickView. A system administrator has access to the Administration and Application tabs. The portal administrator and WebLogic administrator have access to the Administration, Application and Manage tabs, but the portal administrator role does not have access rights to WebLogic. One user can have multiple roles assigned to them so a portal admin can also be a WebLogic admin.

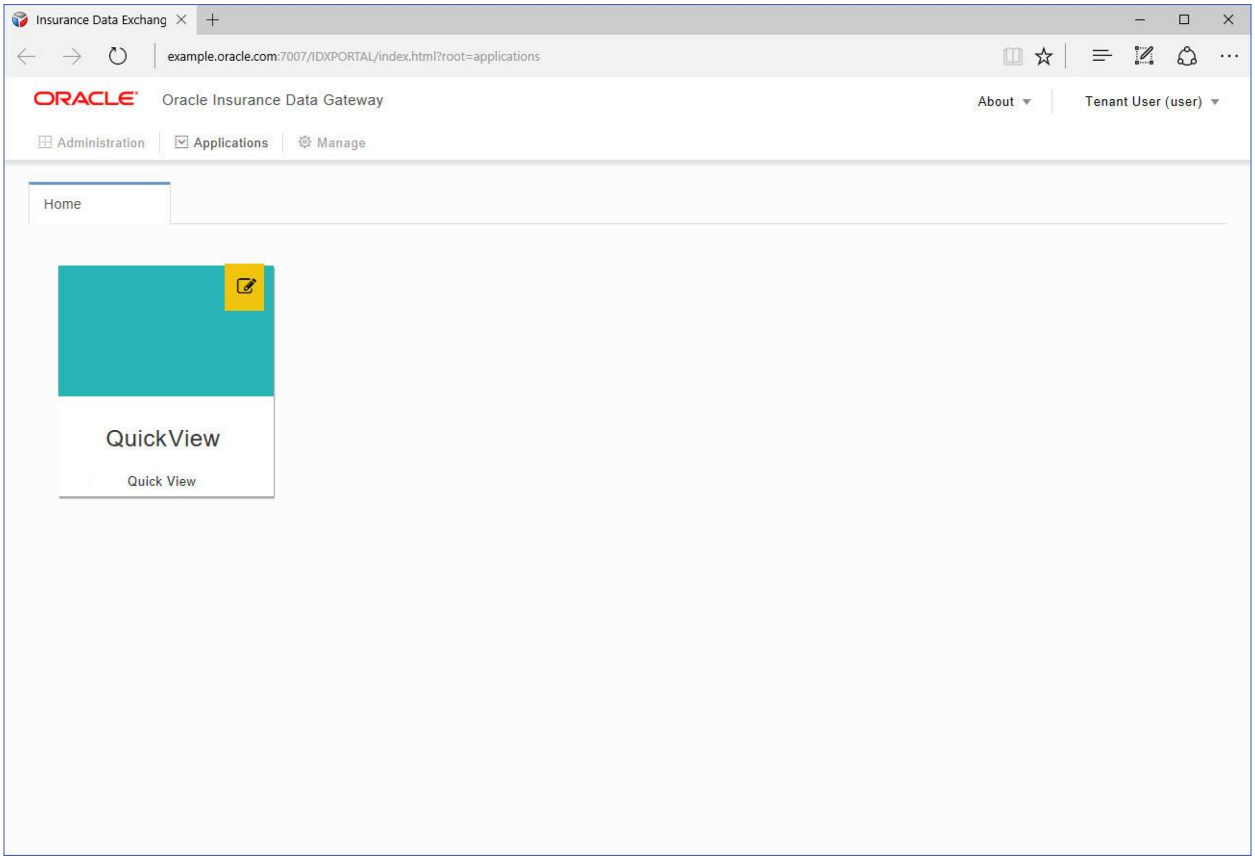
Portal users should receive from their system administrators:

- Portal URL
- Username
- Password

To gain access to QuickView, AdminView, or any of the Portal tabs please contact your OIDG administrator. Further information can be found in the OIDG Security Guide.

A successful login places you on the landing page for the permissions you have. For Users, that would be the Application tab. For administrators, that would be the Administration tab.

Application Tab

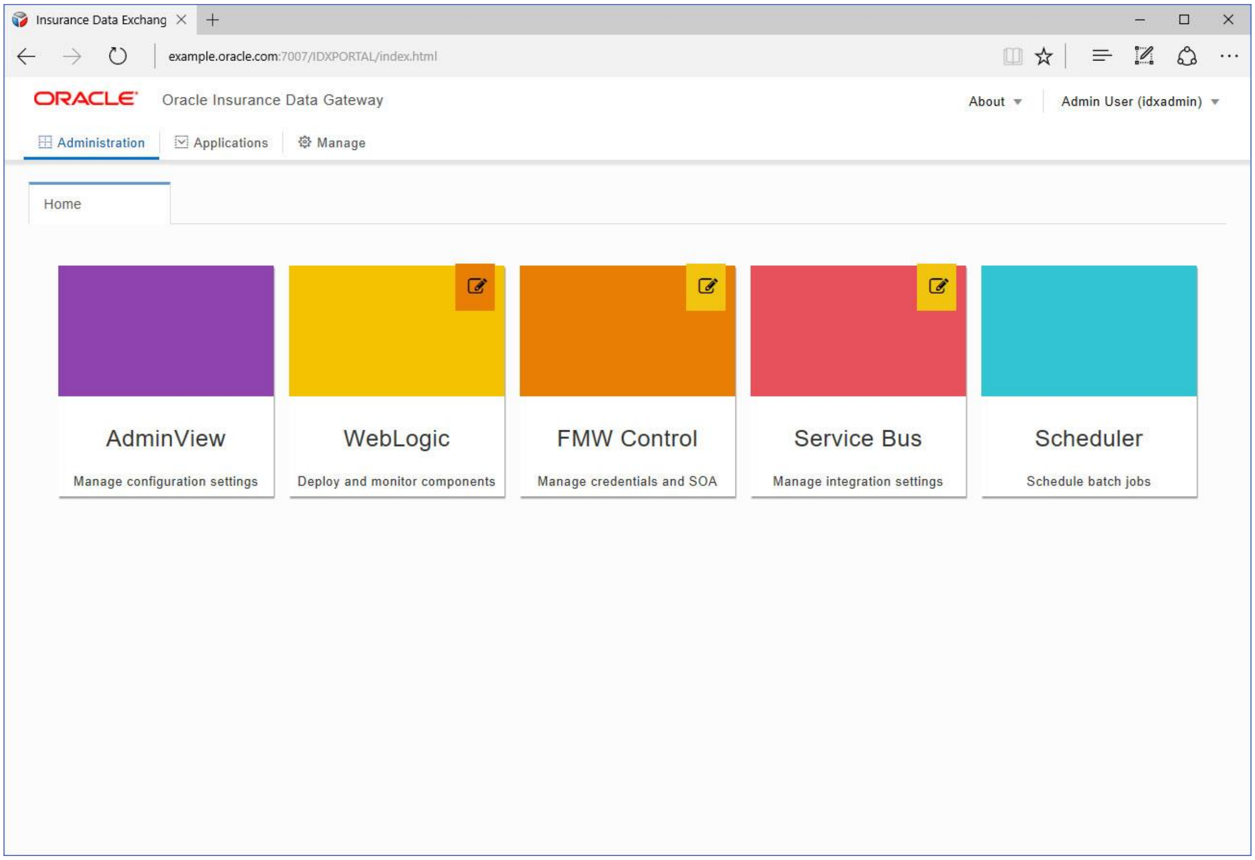


The Application tab contains a link to the QuickView application. Click the link to be placed in QuickView.

Notes

The notes icon indicates there is a message available. Click the note to see the message.

Administration Tab



Note: The Oracle Insurance Data Exchange (OIDX) Cloud Service and Oracle Insurance Data Gateway (OIDG) share the same code base. Because of this, some property names used to configure OIDG will have an "OIDX" prefix.

The Administration tab contains links to the following:

- **AdminView** - the administrative console for OIDG configuration. Click the link to be placed in AdminView. If you do not have permissions to AdminView, you may receive an error message.

- **WebLogic** - the WebLogic application server where OIDG has been deployed. Permissions are required to enter WebLogic. Clicking the link will place you on the WebLogic login page.

- **FMW Control** - the Fusion Middleware Control (FMWC) application were credentials and SOA configuration are managed. Permissions are required to enter FMWC. Clicking the link will place you on the FMWC login page. Roles managed in FMW include:
  - OIDXAdmin – Allows for access to the Administration tab and the Application tab. The Manage tab is grayed out.
  - OIDXOrgAdmin – For the OIDX Cloud Service only. Not used in OIDG.

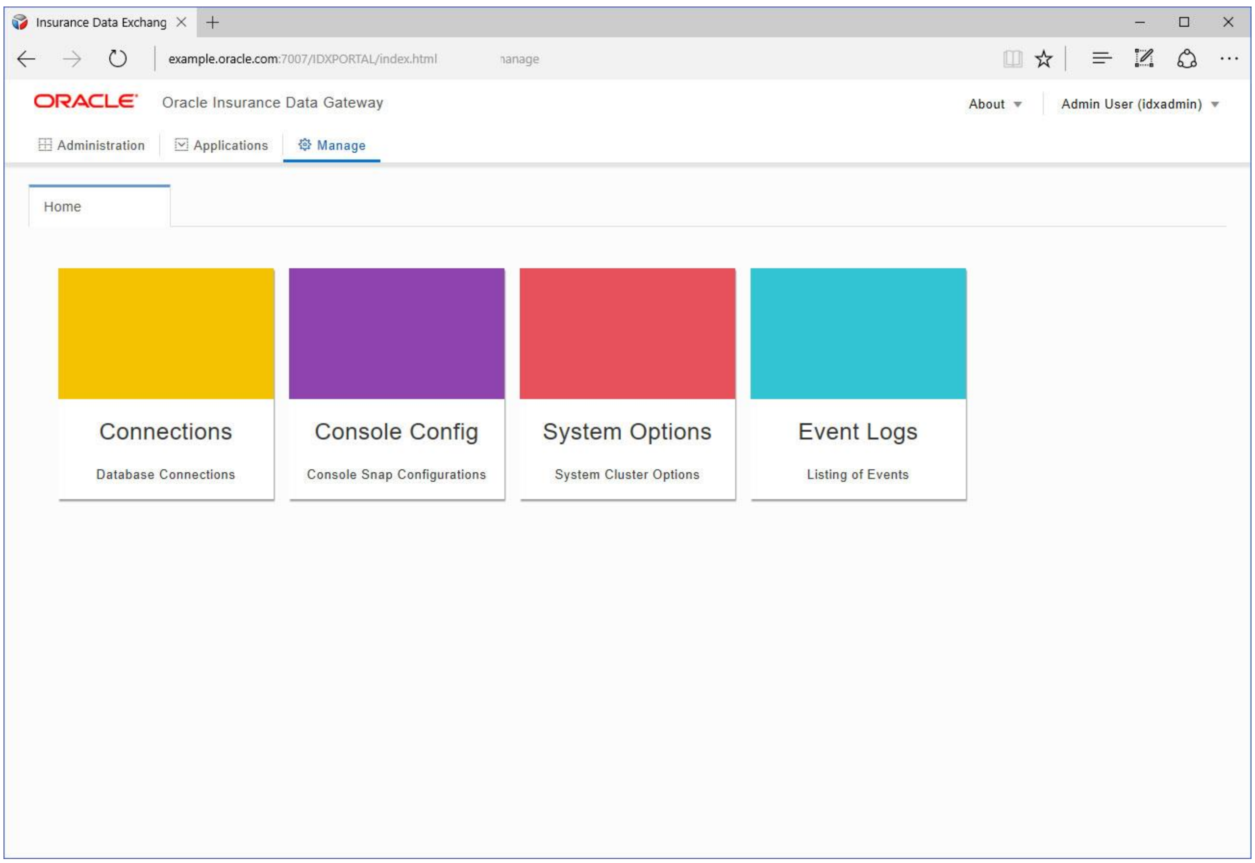
- OIDXPortalAdmin – Allows for access to the Manage tab and the Application tab. The Administration tab is grayed out.
- OIDXUser – Access to the Application tab only. Default role if no permissions are assigned.

Please refer to the Security Guide for more information.

- **Service Bus** – where external integration endpoint details are managed. Permissions are required to enter Service Bus. Clicking the link will place you on the Service Bus login page.

- **Scheduler** - where batch jobs are setup and scheduled to be run. Permissions are required to enter Scheduler. Clicking the link will place you on the Scheduler login page.

Manage Tab

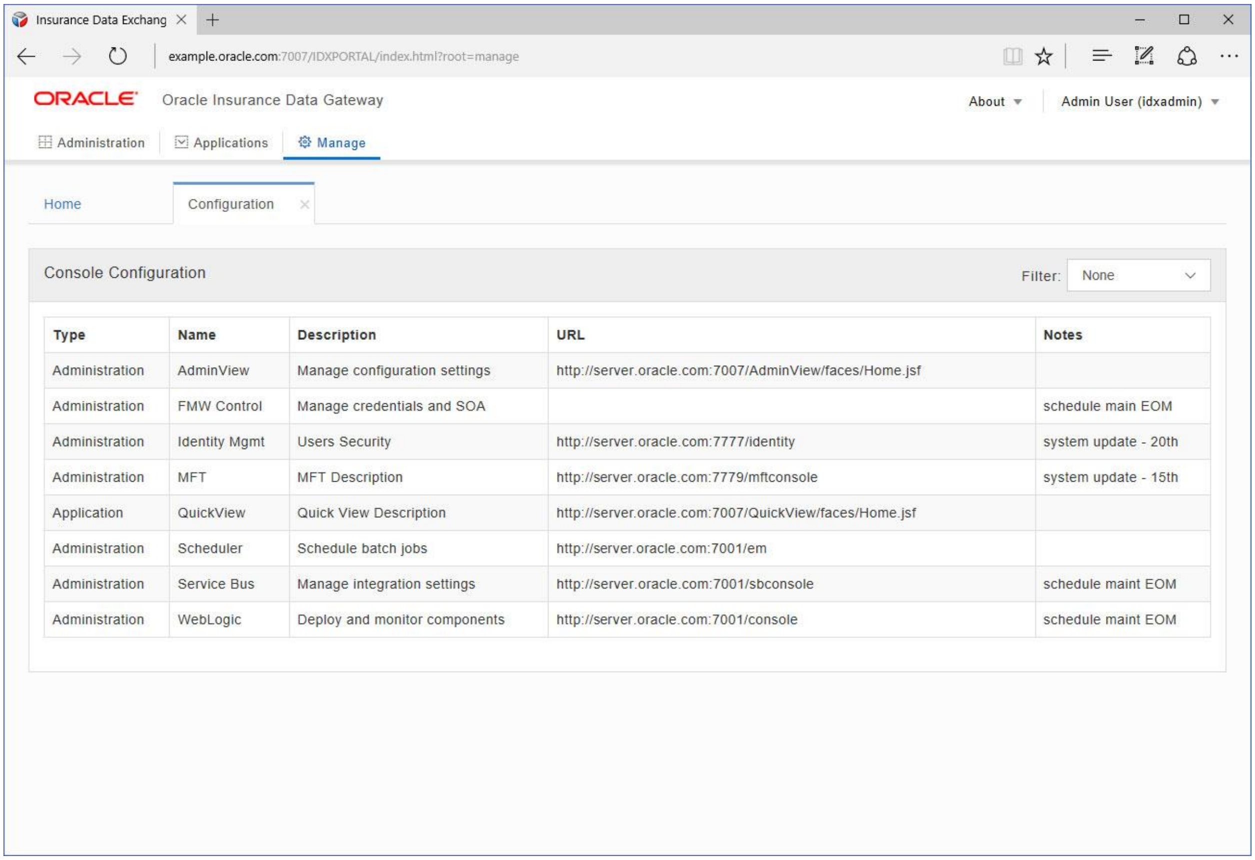


The Manage tab is available to WebLogic administrators only. It contains the following:

- **Connections** – Database connections currently in use.
- **Console Config** – Name, description, and URL for the links found in the portal.
- **System Options** – Configurable options for the portal
- **Event Logs** – listing of event logs. This tab is helpful when troubleshooting issues.

Clicking an option opens a tab on the page. You can have one or more tab at any time. Navigate between the tabs by clicking on them.

Console Config



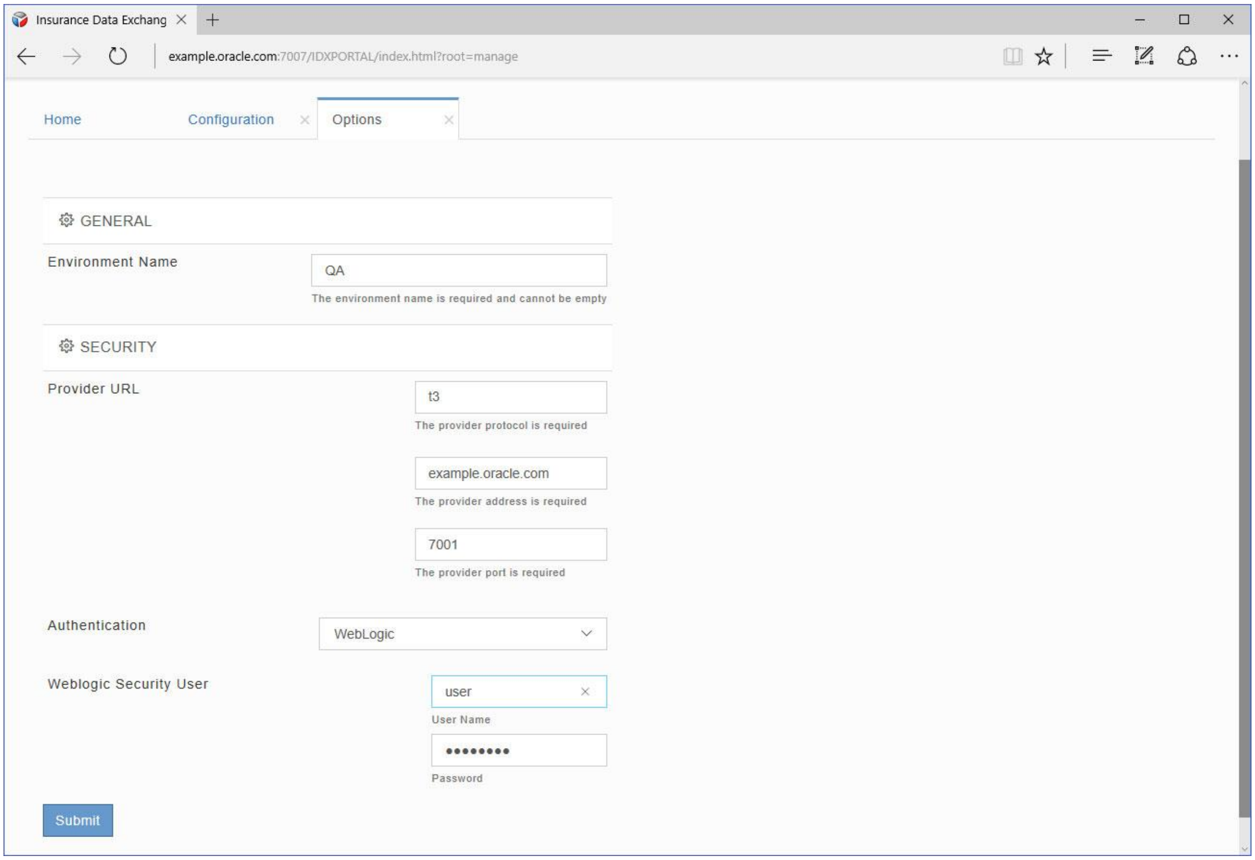
The Console Config option allows you to set the description, URL, and add notes. The options listed are fixed. Options cannot be added or removed.

To edit, click in the field where you want to make changes and edit. Changes are immediate and cannot be undone.

If no URL has been entered, users cannot access that application from the portal. The application will not launch.

To enter a note, begin typing in the notes filed on the table. Notes will appear to users immediately. Notes can be useful when you want to let OIDG users know information pertinent to them. For example, if system maintenance is to be performed and the system will be unavailable.

System Options



System options are configurable options for the portal. This must be setup prior to any users accessing the portal. There are two areas:

General – Enter an Environment name. This field cannot be empty.

Security – Connection Information for the portal.

1. Enter in the protocol, address and port of the portal. This is the server where OIDG has been deployed. The protocol should be t3.
2. Select WebLogic as the Authentication.
3. Enter the WebLogic User and Password.

Logging Out

To log out from the OIDG portal click Logout.

OVERVIEW

This chapter includes following topics:

- Basic information about OIDG portal applications
- Their functions
- Terminologies

OIDG portal gives you access to following applications based on your role in organization:

- For Administrators
  - WebLogic Console
  - Enterprise Manager Console
  - Service Bus Console
  - Managed File Transfer Console
  - Oracle Identity Management
  - AdminView
  - QuickView
- For Non-Administrators
  - QuickView

WebLogic Console

WebLogic Server Administration Console is a Web browser-based, graphical user interface that you use to manage a WebLogic Server domain.

Enterprise Manager Console

Oracle Enterprise Manager (OEM or EM) console is a set of web-based tools aimed at managing software and hardware produced by Oracle or non-Oracle entities.

Service Bus Console

Oracle Service Bus Console is a web-based console where you can create and configure most Service Bus resources, test the resources, and activate your changes to the runtime. You can also import and export Service Bus configuration JAR files.

AdminView

AdminView is a web-based application that is part of the Oracle Insurance Data Gateway (OIDG) product. It allows users to configure parties, party services, endpoints, environments, and party contract mapping using the AdminView application.

How AdminView Functions within OIDG

AdminView provides configuration control for transaction activities between parties. It allows you to define which services will be used between parties and the endpoint configuration details needed to communicate between them.

QuickView

QuickView is a front-end web-application used by insurance companies to view real-time and batch transactions that are sent to and routed through Oracle Insurance Data Gateway (OIDG) to 3rd party destinations. It is used by authorized OIDG users to view the status and routing of policies processed through the system.

How QuickView Functions within OIDG

OIDG validates and routes policy transaction data provided by sender parties to various target destinations depending on the transaction type. QuickView displays these transactions showing the sending and receiving parties as well as the transaction type and status. Transactions can fail to pass validation rules or to reach their target recipient services for various reasons. QuickView provides a means to monitor transaction health.

The validation process includes these stages:

1. **ACORD® AML Compliance Validation** – In this stage, the input request XML is validated to check whether it is ACORD complaint.
2. **Business Rule Validation** – In this stage, the request data is checked against the business rules as defined in the OIDG rule engine.

If either of these stages fail, the transaction would be terminated, marked as failed, and appropriate error messages would be logged. A QuickView user would be able to view the transaction list, find the failed transaction, its captured error messages, and respond as needed to that particular failure.

The transactions listed in QuickView can be searched, sorted, and filtered by applying criteria such as policy number, transaction IDs, message time, sender party, etc.

After passing validation, a transaction will continue to be routed to the destination system. If OIDG experiences a failure communicating with the destination system, the failing transaction can be resubmitted from QuickView.

Terminologies

This section describes the terminologies used within the OIDG portal applications.

Data Integration Mechanisms

Web Service

Allows parties to communicate their services with web-service supported applications.

File Transfer

Allows parties to integrate their services with supported file transfer based integration services. It supports PGP encrypted files and compressed zip files. File transfers are triggered from jobs defined in the Enterprise Scheduler Service (ESS).

Three types of file transfer mechanisms are supported:

- FTP – to read and move files from an FTP server
- FileMove – to read and move files from a remote or local server folder location
- LocalFile – to read files from a local OIDG application folder

Batch

A batch is an XML file that generally has one or more policy transactions included. Each XML file is considered to represent one “batch” of transactions. These files are identified with a unique ID called a batch ID. Batches are monitored on the Batch Transactions tab.

Batch Group

A batch group is a collection of one or more batch XML files. It can be a single zip file or a collection of all the XML request files present in the request folder when a batch job starts. This “collection” of batch files is identified with a unique ID called a batch group ID. Batch groups are monitored on the Batch Transactions tab.

Transaction Direction

Transactions are directional and the QuickView application presents transactions based on their direction as it pertains to OIDG. Transactions are either inbound to OIDG or outbound from OIDG.

Inbound Transactions

These are inbound requests that OIDG has received. They can be web service requests or batch requests.

Outbound Transactions

These are outbound requests that are sent from OIDG to external destination systems. A single inbound transaction may result in multiple outbound transactions.

Transaction Message Types

These are the supported transaction types:

Policy Synchronization

A Policy Synchronization message contains policy and client data. It allows full policy details to be communicated between a sender and a receiver. This can be used to send new business data or policy changes between parties. Policy Synchronization can be used to send policy data one policy at a time via the OIDG web-service interface or in large batches via the OIDG file transfer interface.

Policy Reconciliation

A Policy Reconciliation message implies that the policy exists in the sender system and is possibly known by or new to the receiving system, which needs to be brought up to date. It is basically intended to get the receiving system in sync with the sending system. This message type is used to sync large batches of policies.

Policy Migration

A Policy Migration message implies that the policy exists in the sender system but is not known to the receiving system. This message is used to send large batches of policies from one system to another to initialize the receiving system with this policy information.

Commission

A Commission message contains a commission statement which reports commission details for multiple policies.

Premium

A Premium message contains premium payment data for a policy.

Transaction Errors

Errors incurred during transaction processing are categorized as follows:

- XMLSchemaError - The input XML is not well formed or not ACORD complaint.
- BusinessRuleValidationError - Failed to meet business rule requirements.
- CommunicationError -The destination web service is down or communication to it is not possible.
- BusinessServiceError - The destination web service returned an error.
- ApplicationError - Internal failure within the OIDG application.

Chapter – 3

USING OIDG PORTAL

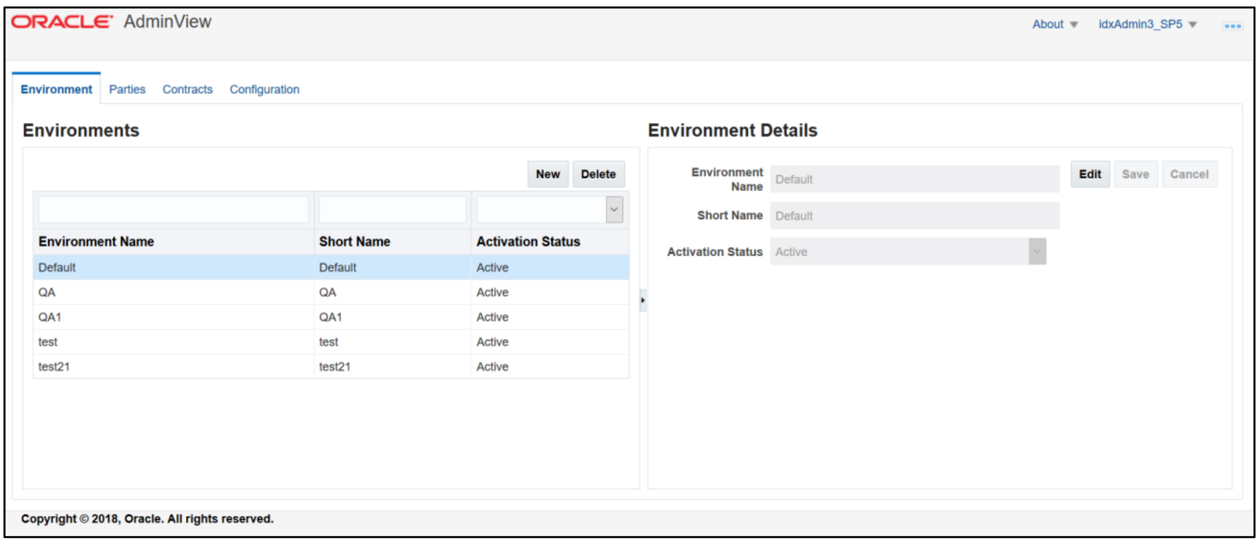
This chapter describes how to use portal applications and their user interface. It is divided into following two sections:

- AdminView User Interface
- QuickView User Interface

Section – 1

AdminView User Interface

A successful log in to the OIDG portal places you on the home page. Click the ‘AdminView’ icon under Application tab to access the AdminView application. A new tab starts in your browser where you can use this application.



The Environments, Parties, Contracts and Configuration tabs are available for selection in the top left area of the page.

These tabs allow you to switch between the tasks corresponding to your requirements.

AdminView Tabs

Application functionality is divided into three major areas on the following tabs:

Environments Tab

This tab allows you to configure multiple configuration domains. This allows you to use one deployment of AdminView to point to party services in different environments like SIT, UAT, QA, and Production without having to update all your endpoint details each time you want to switch between environments.

Parties Tab

This tab allows you to define the sender and receiver parties, select business services to integrate them on, and to define the party service endpoints details.

Contracts Tab

This tab allows you to create and manage business service integration contracts between sender and receiver parties. Contracts can be enabled and disabled without deleting integration configuration settings.

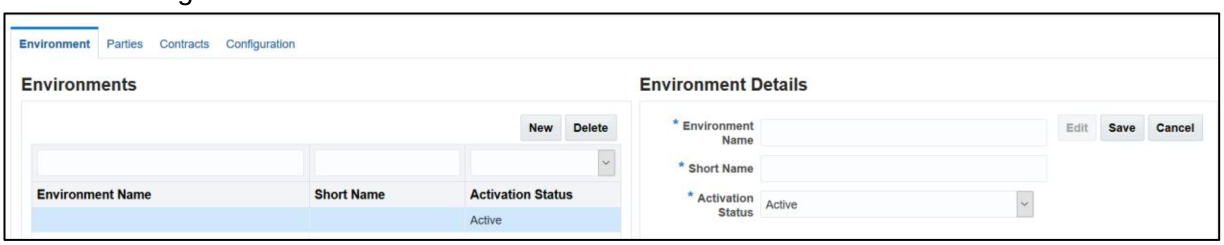
Configuring Environments

The Environment tab is selected by default upon login. This tab will allow you to create, edit, and delete environment configurations.

Creating an Environment

To create a new environment, follow the steps below:

1. Click ‘New’.
2. Enter following details under the column ‘Environment Details’.



   a. **Environment Name** – Name of the environment you wish to create. You may use spaces and underscores in your environment name.
   b. **Short Name** – A short alias or abbreviation. Short Name should start with an alphabet and no special characters are allowed except underscores.
   c. **Status –** Using the drop-down, set the status to Active to enable an environment or Inactive to disable it.

3. Click ‘Save’ once you entered the above details.

If the status of an environment is inactive, it cannot be used for communication between sender and receiver parties. Environments created here will be available for selection under the Parties tab when configuring endpoints for party services.

Editing an Environment

To edit an existing environment, follow these steps:

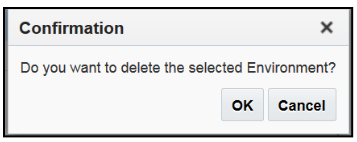
1. Select the row of the environment you wish to edit available in the left column. Environment details are displayed in the right column and the ‘Edit’ button is activated.

2. Click ‘Edit’.
3. Click ‘Save’ once you’ve completed your edits.

Deleting an Environment

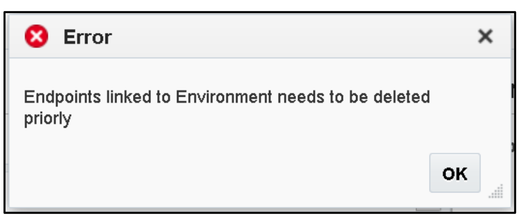
To delete an environment, follow these steps:

1. Select the row of the environment you wish to delete available in the left column.
2. Click ‘Delete’.
   A pop up dialog appears for confirmation.



3. Click ‘Ok’ to delete the environment.

Note: Before you can delete an environment, you must first delete all endpoints linked to that environment. Endpoints are assigned to parties and are then linked to environments. You will receive an error message if you forget to delete a link between an endpoint and an environment when attempting to delete the environment.



Configuring Parties

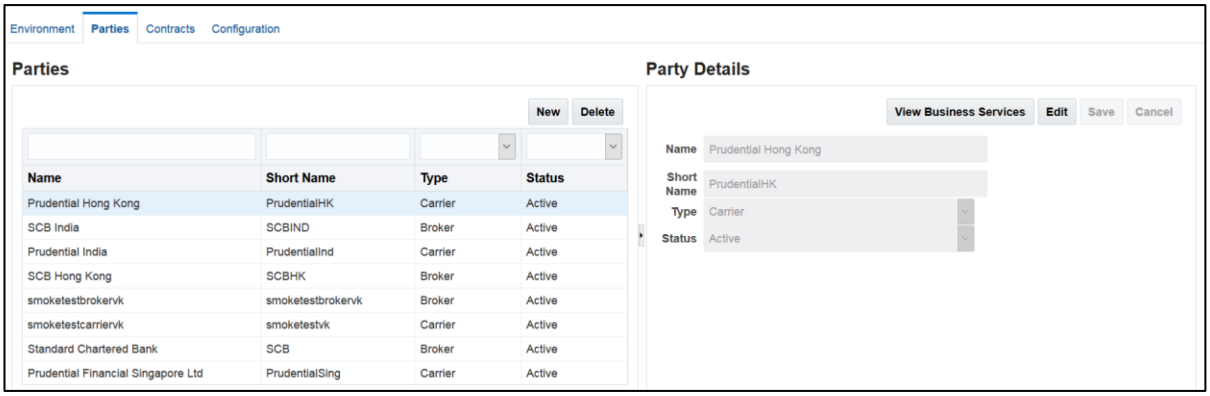
The Parties tab allows you to create, edit, and delete both the various party types that are integrating on the system. Party services and endpoints are also configured under this tab.

Creating Parties

To create a new party, follow these steps:

1. Click ‘New’.

2. Enter following details under the column ‘Party Details’ located on the right side of the page.

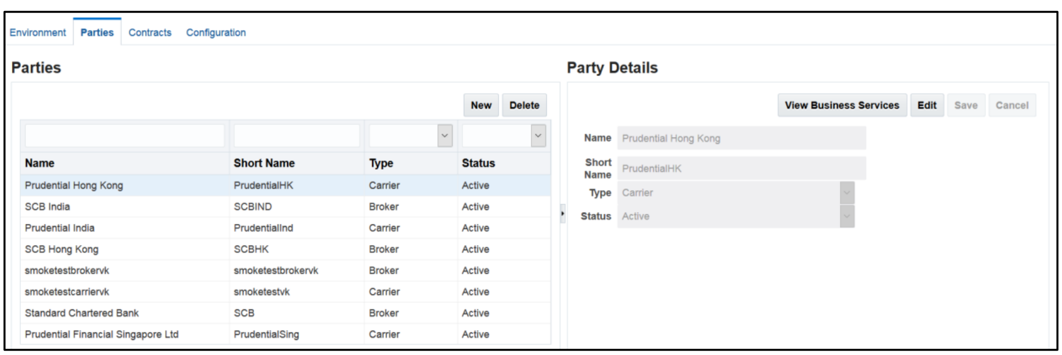


   a. **Name** – Name of the party you wish to create.
   b. **Short Name** – A short alias or abbreviation. Short Name should start with an alphabet and no special characters are allowed except underscores.
   c. **Type** – The party type e.g. Carrier or Broker.
   d. **Status** – Using the drop-down, set the status to Active to enable a party or Inactive to disable a party. An Inactive status prevents any communication with a party at runtime.
3. Click ‘Save’ once you entered above details.

Editing Parties

To edit an existing party, follow these steps:

1. Select the row of the party you wish to edit. Party details are displayed on the right and the ‘Edit’ button is activated.



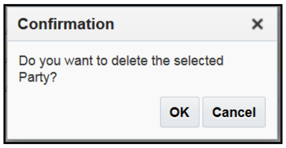
2. Click ‘Edit’.
3. Click ‘Save’ once you’ve completed your edits.

Deleting Parties

To delete party, follow these steps:

1. Select the row of the party you wish to delete.

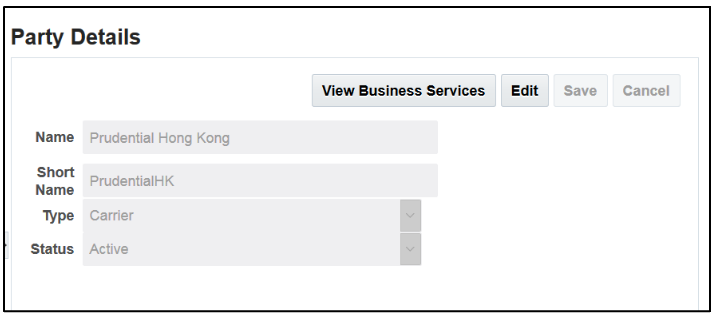
2. Click the ‘Delete’ button.
   A pop up dialog appears for confirmation.



3. Click ‘Ok’ to delete the party.

Configuring Business Services for Parties

Once you created parties, you can enable them to integrate on business services provided by the system. These business services can be assigned and unassigned using the ‘View Business Services’ button available in the ‘Party Details’ area on the Parties tab.



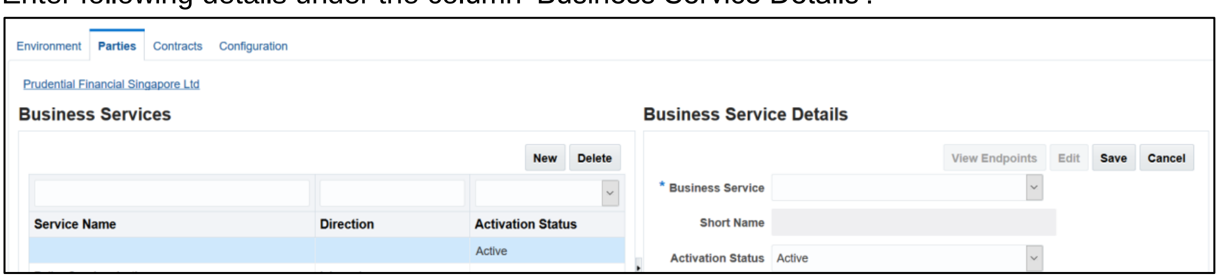
This navigates you to business services page where you can create, edit, and delete business service associations.

Select the row of the party for whom you wish to create, edit, or delete service associations and click ‘View Business Services’.

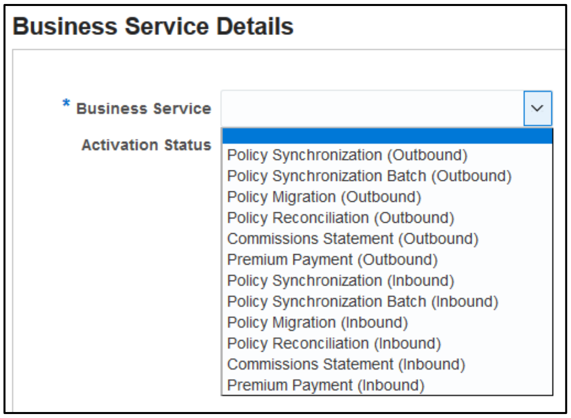
Associating Business Services

To create a new business service association, follow these steps:

1. Click ‘New’.
2. Enter following details under the column ‘Business Service Details’.



   a. **Business Service** – The business service you wish to associate with the party. The options include the business services as shown in the screenshot below. Since a party is either sending data into the system (inbound) or receiving data from the system (outbound) this service direction must also be chosen.



Business Services

Business Service Name	Description
Policy Synchronization (Outbound)	This is used to send new business data or policy changes from OIDG to a receiving party endpoint.
Policy Synchronization Batch (Outbound)	This is used to send batches of new business data or policy changes from OIDG to a receiving party endpoint.
Policy Migration (Outbound)	This is used to send large batches of policies from OIDG to a receiving party to initialize the receiving system with this policy information.
Policy Reconciliation (Outbound)	This is used to send large batches of policies from OIDG to a receiving party with the intent to synchronize the sender and receiver party systems.
Commissions Statement (Outbound)	This is used to send commission details for multiple policies to a receiving party endpoint.
Premium Payment (Outbound)	This is used to send premium payment data for a policy to a receiving party endpoint.
Policy Synchronization (Inbound)	This is used to receive new business data or policy changes from a sending party into OIDG.
Policy Synchronization Batch (Inbound)	This is used to receive batches of new business data or policy changes from a sending party into OIDG.
Policy Migration (Inbound)	This is used to receive large batches of policies from the sending party into OIDG with the intent to initialize the receiving party system with this policy information.

Policy Reconciliation (Inbound)	This is used to receive large batches of policies from the sending party into OIDG with the intent synchronize the sender and receiver party systems.
Commissions Statement (Inbound)	This is used to receive commission details for multiple policies from the sending party into OIDG with the intent to send them to a receiving party.
Premium Payment (Inbound)	This is used to receive premium payment data for a policy from the sending party into OIDG with the intent to send it to a receiving party.

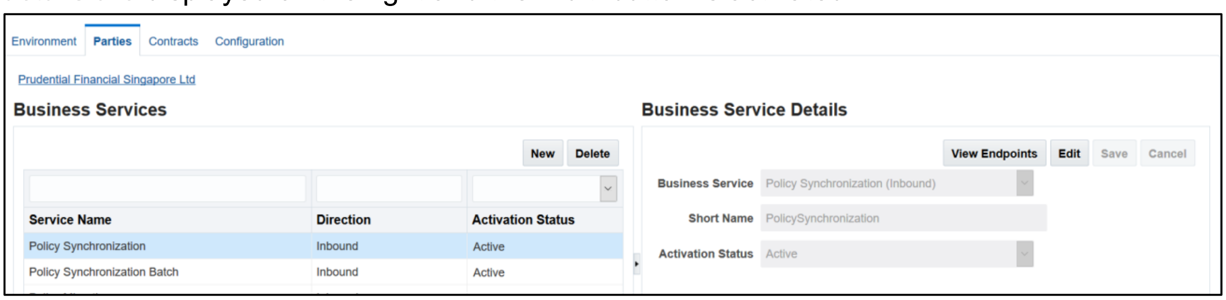
b. **Status –** Using the drop-down, set the status to Active to enable a party or Inactive to disable a business service association. An Inactive status prevents any communication over this particular business service association for the indicated parties at runtime.

3. Click ‘Save’ once you entered the above details.

Editing a Business Service Association

To edit a business service association, follow these steps:

1. Select the row of the business service association you wish to edit. Business service details are displayed on the right and the ‘Edit’ button is activated.



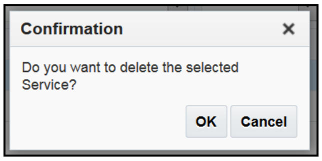
2. Click ‘Edit’ and make the changes.
3. Click ‘Save’ once you’ve completed your edits.

Deleting a Business Service Association

To delete a business service association, follow these steps:

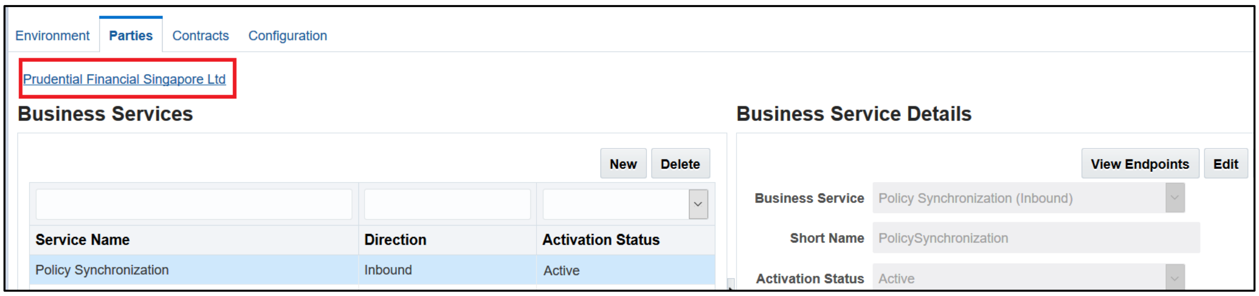
1. Select the row of the business service association you wish to delete.

2. Click the ‘Delete’ button.
   A pop up dialog appears for confirmation.



3. Click ‘Ok’ to delete the service association.

Note: To go back to the Parties page, click the hyperlink as shown in the screenshot below.

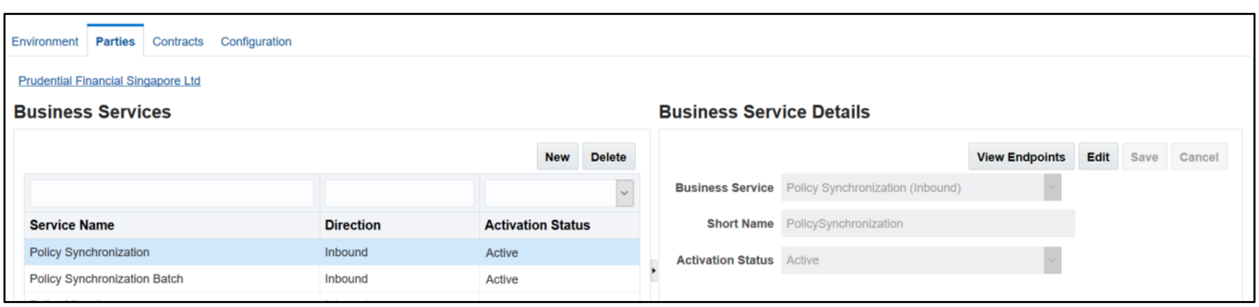


Configuring Endpoints for a Party’s Business Service Association

Endpoints are a means to integrate party services with OIDG business services. All the information required to access a party’s service are defined in endpoints. This includes information like URLs, port numbers, folder locations, etc.

Once you’ve created parties and associated business services to them, you can then create, edit, or delete endpoints for each of the business services. Endpoint configurations can be different in each environment that you’ve created. The environments that you created will be available for selection during endpoint configuration.

To configure endpoints, select row of the business service then click the ‘View Endpoints’ button available under ‘Business Service Details’ located on the right side of the page.

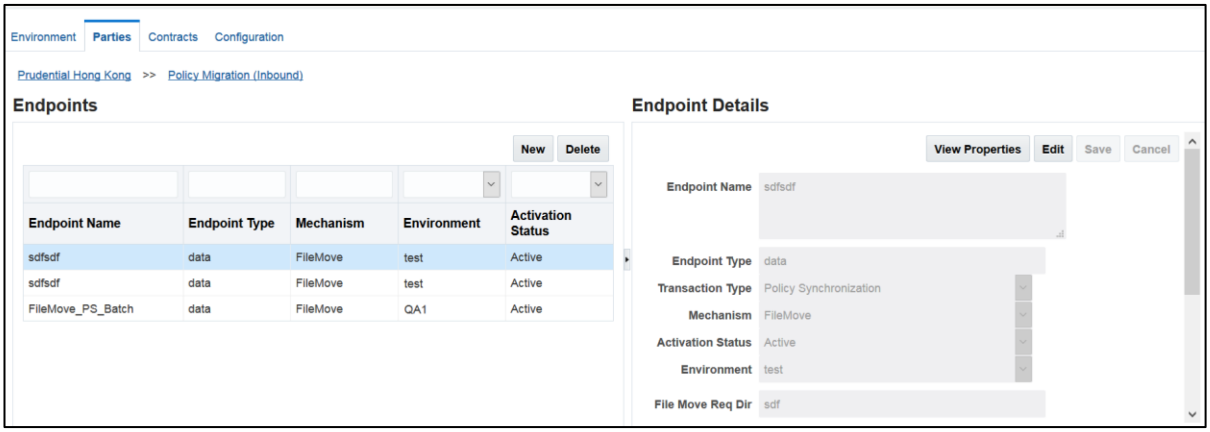


This navigates you to Endpoints page where you can create, edit, and delete endpoints.

Creating an Endpoint

To create a new Endpoint, follow these steps:

1. Click the ‘New’ button.
2. Select the ‘Environment’ and ‘Mechanism’ using the drop-down.

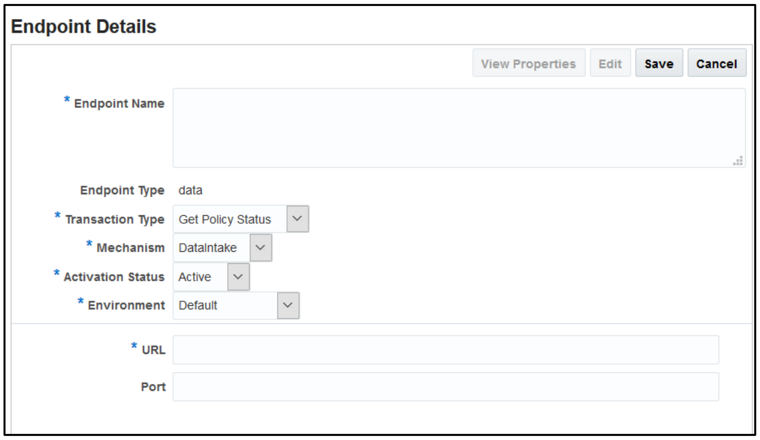


Enter following details:

Fields	Description
Endpoint Name	Name of endpoint
Endpoint Type	By default it is set as ‘data’
Transaction Type	Transaction type can be set to one of the following **Client Data Submit –** submit customer data only **Policy Submit –** submit full policy data **Get Policy Status –** query to see if policy already exists in the receiving system
Mechanism	There are 2 mechanisms • Dataintake – An Oracle Insurance Policy Administration queue-based integration transport type • Webservice – SOAP-based integration
Activation Status	Active or Inactive
Environment	One of the environments created on the environments tab

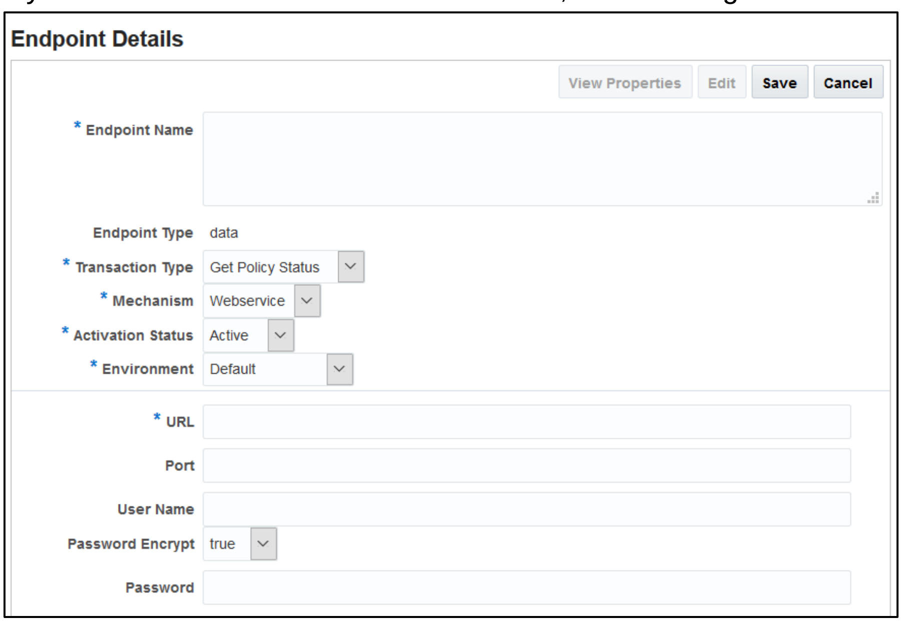
By default, the mechanism field is blank. Based on the mechanism selected, other fields will populate and display.

- If you selected the Dataintake mechanism, the following fields are displayed



Fields	Description
URL	Web service URL
Port	Web service Port

- If you selected the Webservice mechanism, the following fields are displayed



Fields	Description
URL	Web service URL
Port	Web service Port

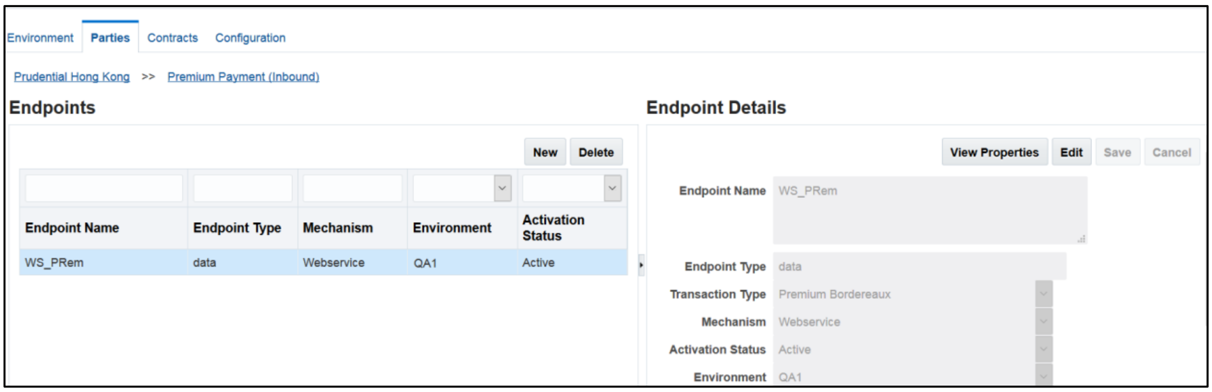
User Name	Enter a user name
Password Encrypt	Select true/ false
Password	Enter a password

3. Click ‘Save’ once you entered the above details.

Editing an Endpoint

To edit an existing endpoint, follow these steps:

1. Select the row of the endpoint you wish to edit. Endpoint details are displayed on the right and the ‘Edit’ button is activated.

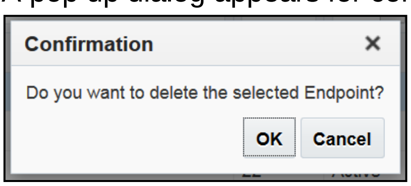


2. Click ‘Edit’ and make the changes.
3. Click ‘Save’ once you’ve completed your edits.

Deleting an Endpoint

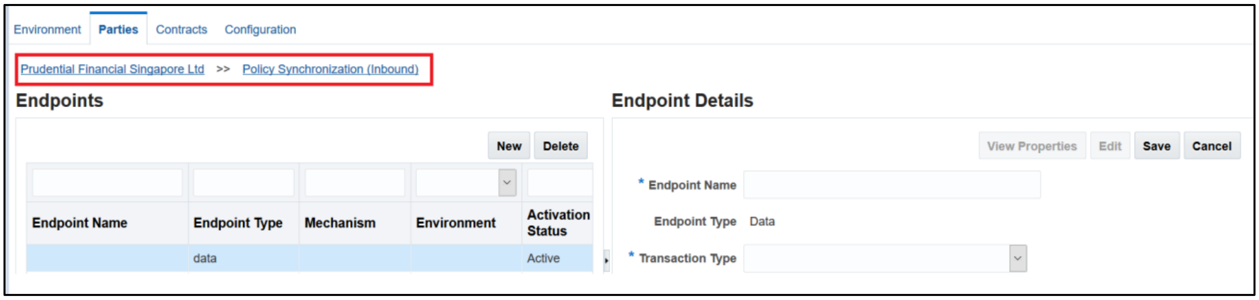
To delete an endpoint, follow these steps:

1. Select the row of the endpoint you wish to delete.
2. Click ‘Delete’.
   A pop up dialog appears for confirmation.



3. Click ‘Ok’ to delete the endpoint.

Note: If you are on the Endpoints page, you may navigate to back to the Parties or Services pages using the breadcrumb links available at the top of the page as shown in the screenshot below.



Configuring Properties for Endpoints

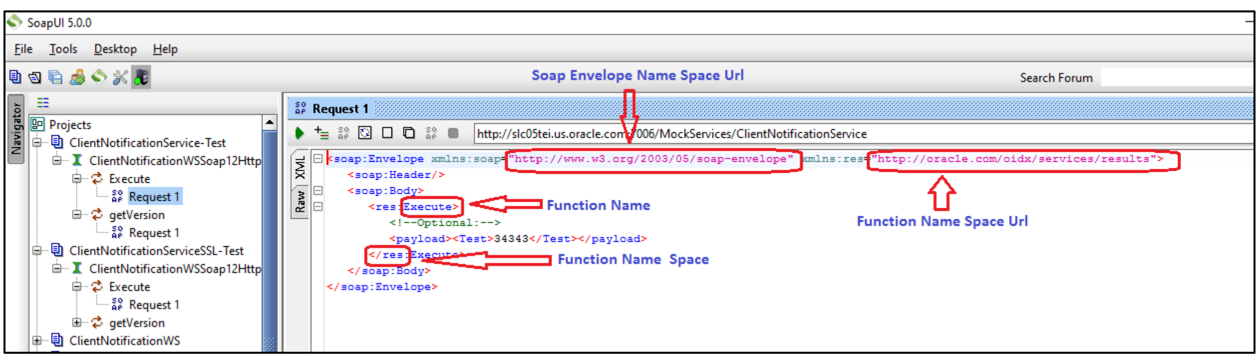
Endpoint properties allow for fine-grained value specification of integration endpoint details. They can also help receiving party systems determine how to handle messages they are receiving from OIDG. OIDG uses system defined properties to capture details it needs about the endpoint transport and security needs. Custom properties can be used to transmit values the receiving system might need to better handle messages coming from OIDG.

System Properties

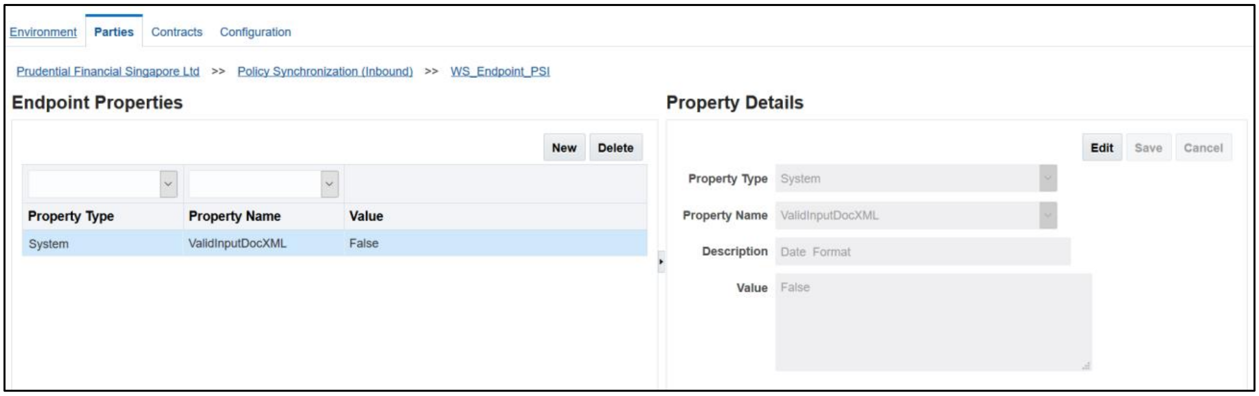
Endpoint Property Name	Values	Purposes and Dependency
Use Legacy WS Caller Process	True or False. Defaults to False.	Setting 'True' will call the integrated web service values defined by client's WSDL. Setting 'False' will call the integrated web service values defined by OIDG's own WSDL.
Soap Envelope Name Space Url	Example: http://www.w3.org/2003/05/soap-envelope	Soap envelope space URL, refer the SOAP UI screen below the table (required if the WS caller value is set to 'True')
Function Name	Example: "Execute"	WS Function name refer below screen (required if the WS caller value is set to 'True')
Function Name Space Url	Example: "http://oracle.com/oidx/services/results"	WS Function name refer below screen (required if the WS caller value is set to 'True')
Function Name Space	Example: "res"	WS Function name space refer below screen (required if the WS caller value is set to 'True')
Function Type	Example: "xml"	Payload is available in xml format (required if the WS caller value is set to 'True')
Valid Input Doc XML	True or False. Defaults to False.	Setting this property will validate the payload xml file (required if the WS caller value is set to 'True')
Input Params	Example: "<payload><![CDATA[%1$s]]></payload>"	These values are input parameters to the function name, refer below screen (required if the WS caller value is set to 'True')
Need SSL	True or False. Defaults to False.	Set to 'True' if you wish to integrate secure web service
Date Format	Example: "YYYY-MM-dd'T'HH:mm:ss.SSS'Z'"	It's a web service soap date time format of client WS (required if the WS caller value is set to 'True')
Expires Time In Minutes	Example: 5	Client web service expires time in minutes (required if the WS caller value is set to 'True')

Time Zone	Example: "UTC"	Time zone where client web service deployed (required if the WS caller value is set to ‘True’)
Need Ext KeyStore	True or False. Defaults to False.	Set to ‘True’ if you have client web service trust store file
External KeyStore File Type	Example: “JKS”	Key Store file extension type
External KeyStore File Name	Example: “LocalKeyStore.jks”	Key Store file name with extension
External KeyStore Location Path	Example: “/scratch/idxAdmin/config”	Key Store location path where key store file is copied
External KeyStore Password		Key store password
External KeyStore Password Encrypted	True or False. Defaults to False.	Set to ‘True’ if the key store password is encrypted
Need Ext TrustStore	True or False. Defaults to False.	Set to ‘True’ if you have client web service trust store file
External TrustStore File Type	Example: “JKS”	Trust Store file extension type
External TrustStore File Name	Example: “LocalKeyStore.jks”	Trust Store file name with extension
External TrustStore Location Path	Example: “/scratch/idxAdmin/config”	Trust Store location path where trust store file is copied
External TrustStore Password		Trust Store password
External TrustStore Password Encrypted	True or False. Defaults to False.	Trust Store password in encrypted is true
External WebService SSL Provider	Example: TLSv1.2	Client web service SSL provider
External WebService SSL Cipher Suite	Example: TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA	Client web service SSL cipher suite

Example SOAP Property Sources



Example SOAP Endpoint Property Entries



Custom Properties

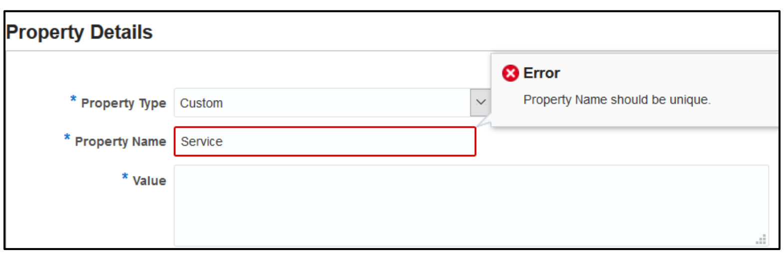
Users can create any name-value pair needed. These will be sent to the receiving system which can then act upon those specifications or ignore them.

Creating a Custom Property for an Endpoint

To create an endpoint property follow these steps:

1. Click the ‘View Properties’ button located under endpoint details column.
2. Click ‘New’.
3. Select ‘Custom’ for the ‘Property Type’.

   Note: Property names must be unique. Duplication of property names is not permitted and results in the following error.

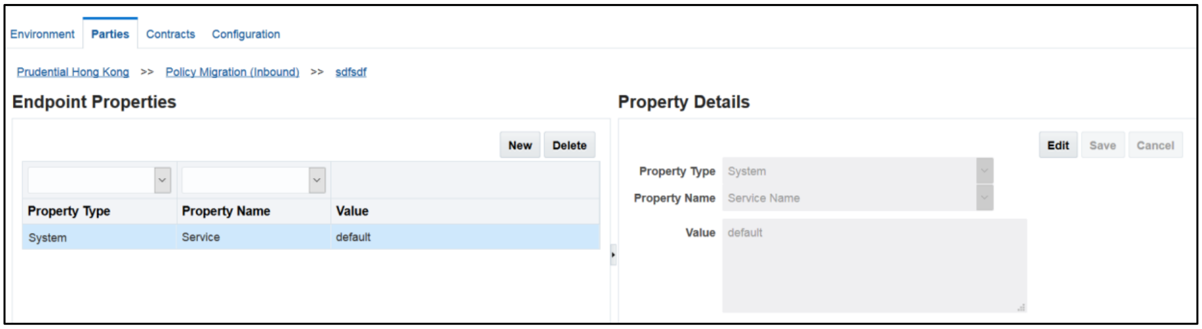


4. Enter a value and click ‘Save’.

Editing an Endpoint Property

To edit an existing endpoint property, follow these steps:

1. Select the row of the endpoint property you wish to edit available in the left column. Endpoint property details are displayed in the right column and the ‘Edit’ button is activated.

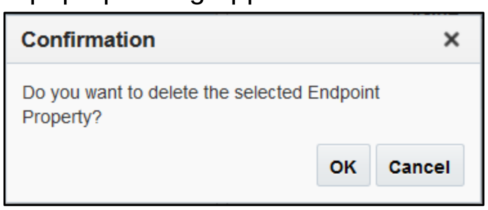


2. Click ‘Edit’ and make the changes.
3. Click ‘Save’ once you’ve completed your edits.

Deleting an Endpoint Property

To delete an endpoint property, follow these steps:

1. Select the row of the endpoint property you wish to delete.
2. Click the ‘Delete’ button.
   A pop up dialog appears for confirmation.



3. Click ‘Ok’ to delete the endpoint property.

Configuring Contracts

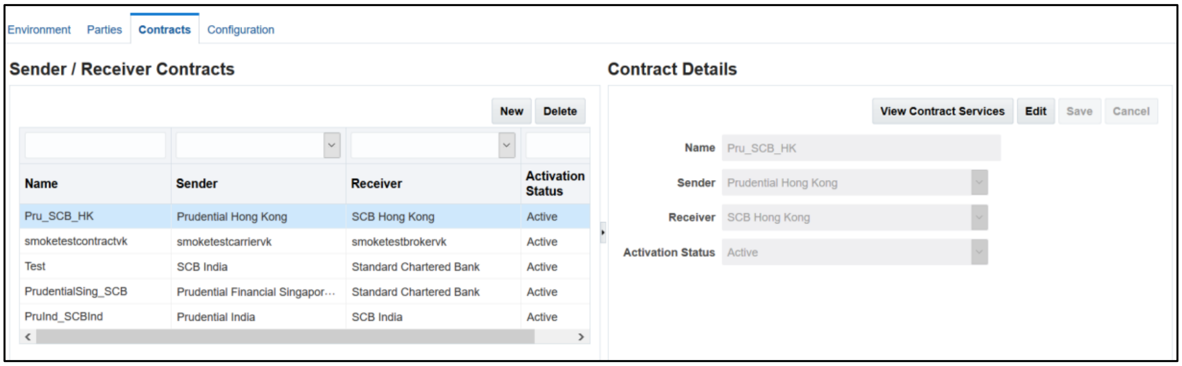
The Contracts tab allows you to create, edit, and delete the details for mapping the inbound services associated with a sender party to the outbound endpoints associated with the receiving party.

Creating Contracts

To create a new contract, follow these steps:

1. Click ‘New’.

2. Enter following details under ‘Contract Details’ located at the right side of the ‘Sender / Receiver Contract’ page.



a. **Name** – Enter name of the contract you wish to create.

b. **Sender –** Select the sender party via the pre-populated drop-down.

c. **Receiver –** Select the receiver party via the pre-populated drop-down. By default, the receiver field is not displayed. Once you select the sender party through dropdown, then the receiver field is displayed accordingly.

Note: The receiver party cannot be the same as the sender party.

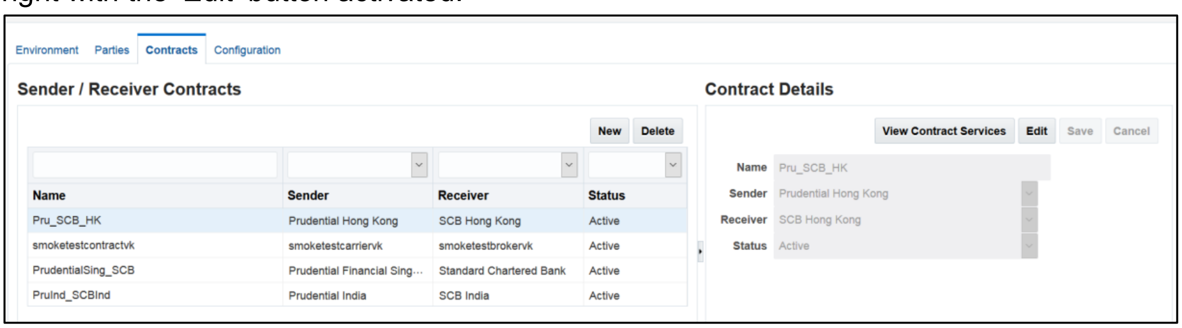
d. **Status** – Select the status Active/ Inactive.

3. Click ‘Save’ once you entered the above details.

Editing Contracts

To edit an existing contract, follow these steps:

1. Select the row of the contract you wish to edit. The contract details are displayed on the right with the ‘Edit’ button activated.



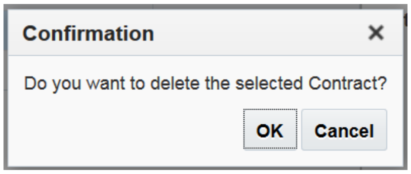
2. Click ‘Edit’ and make the changes.
3. Click ‘Save’ once you’ve completed editing.

Deleting Contracts

To delete a contract, follow the steps:

1. Select the row of the contract you wish to delete.

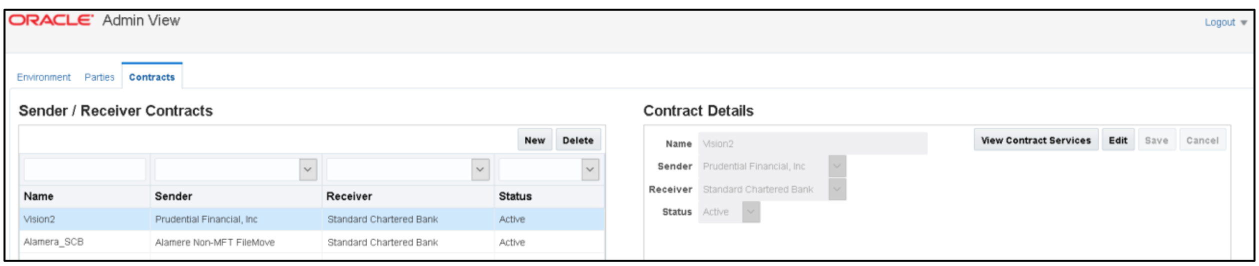
2. Click the 'Delete' button.
   A pop up dialog appears for confirmation.



3. Click 'Ok' to delete the contract.

Configuring Contract Services

Once you created a sender/receiver contract, you can then map inbound business services to outbound receiver party endpoints.

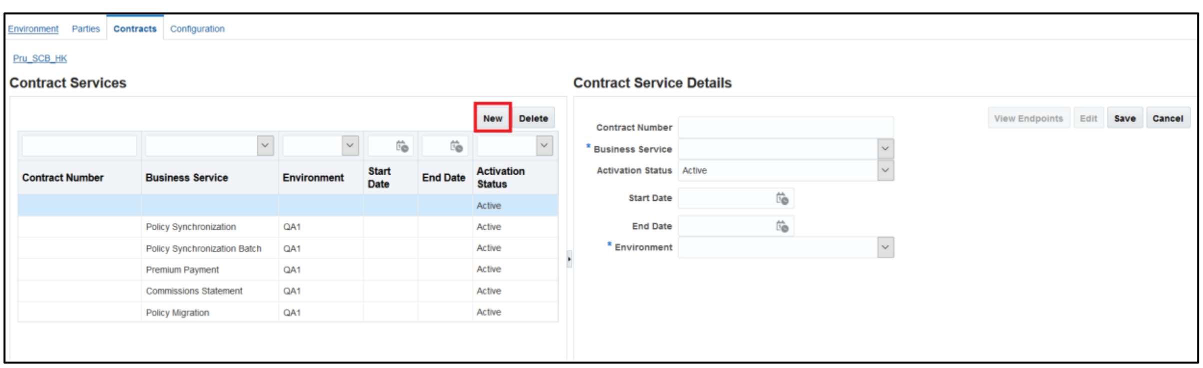


To start, select the row of the contract you wish to create, edit or delete contract services for and then click the 'View Contract Services' button under 'Contract Details'.

Creating Contract Services

To create a new contract service, follow these steps:

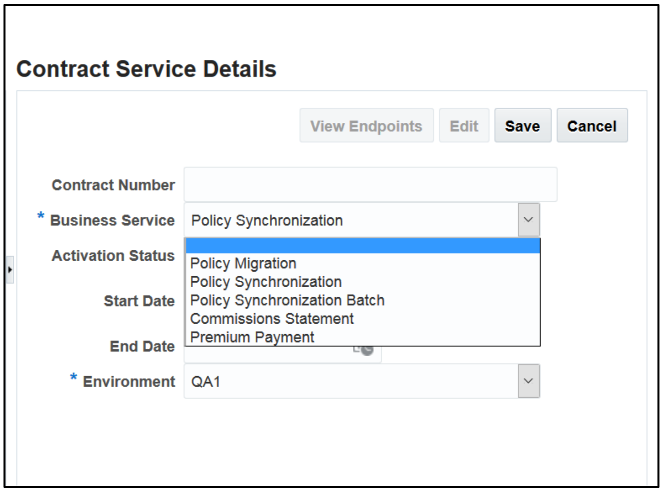
1. Click 'New' under Contract Services.



2. Enter the following details under 'Contract Service Details'.
   a. **Contract Number** – A unique alphanumeric identifier, usually provided by the contract owner (Carrier or Distributor), that represents a contractual agreement

between sender and receiver parties to integrate on specific transaction types. This can be used to validate communication at runtime but is optional.

b. **Business Services** – Select any service through drop-down option.



See Business Services for a description of these services.

3. Specify a desired Start and End date for the contract service.

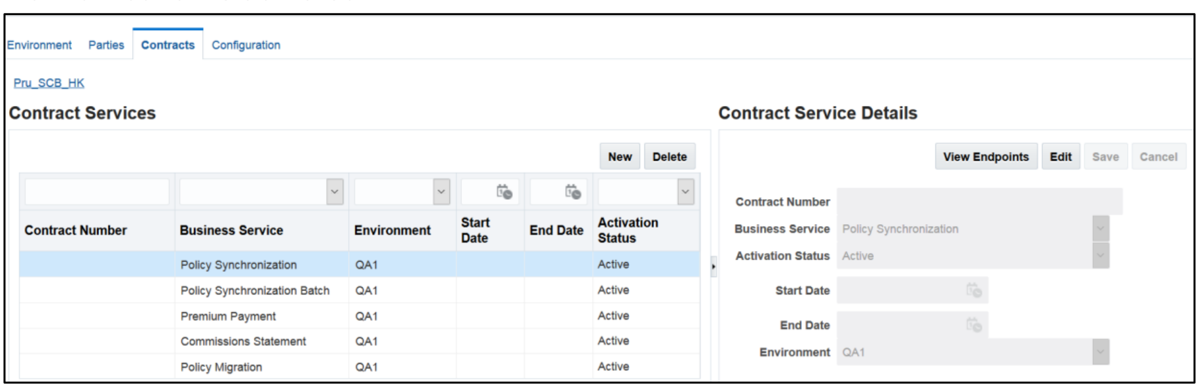
4. Specify the Environment to which you wish to map this service contract. The Environment drop-down will be pre-populated with the environments you created on the Environments Tab.

5. Click ‘Save’ once you’ve entered the above details.

Editing Contract Services

To edit an existing contract service, follow these steps:

1. Select the row of the contract service you wish to edit. Under Contract Service Details, the ‘Edit’ button is activated.



2. Click ‘Edit’ and make the changes.

3. Click ‘Save’ once you’ve completed editing.

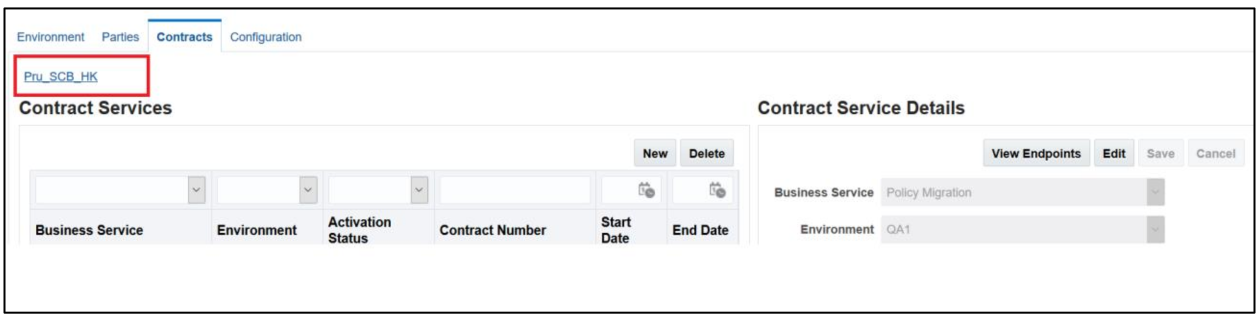
Deleting Contract Services

To delete a contract service, follow these steps:

1. Select the row of the contract service you wish to delete.
2. Click ‘Delete’.
   A pop up dialog appears for confirmation.

3. Click ‘Ok’ to delete the contract service.

Note: To go back to the ‘Sender / Receiver Contracts’ page, click the hyperlinked breadcrumb at the top of the page as indicated in the screenshot below.

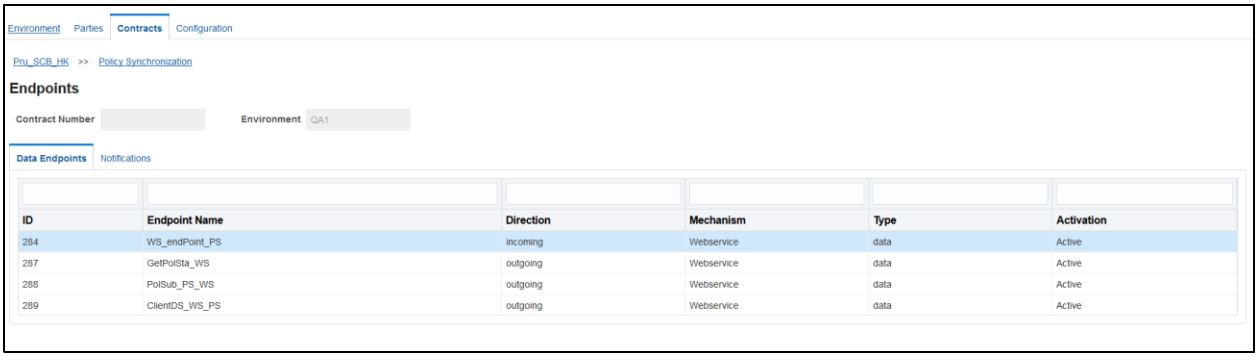


Associating Endpoints to Contract Services

Once you’ve created a contract service, you can assign endpoints to it. These endpoints can be assigned / unassigned using the ‘View Endpoints’ button under ‘Contract Service Details’. This navigates you to the Endpoints page where you can select the endpoints for a particular contract.

Select the row of the contract you wish to assign endpoint(s) to and click the ‘View Endpoints’ button.

The Endpoints page displays a list of endpoints available for the selected contract service. The system automatically determines which endpoints are appropriate for the selected sender, receiver, and business service based on your prior configuration settings.



Note: From the Endpoints page, you can navigate back to the Sender/Receiver Contracts or Contract Services pages by clicking on the breadcrumb links available at the top of the page as indicated in the screenshot below.

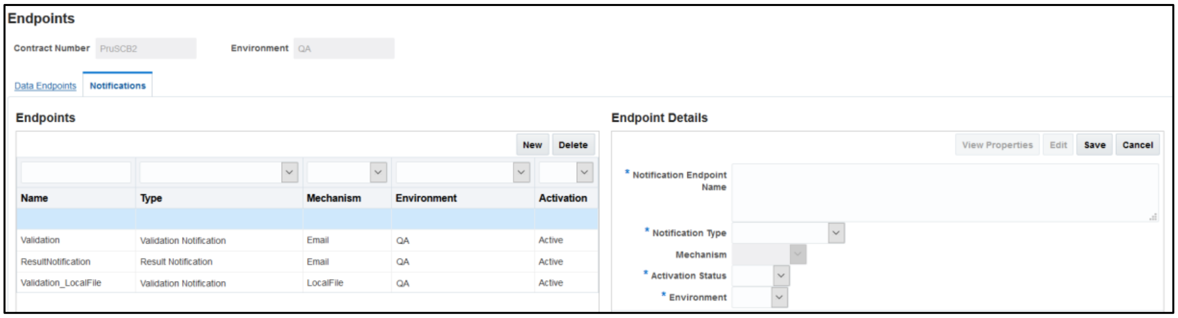
Configuring Notifications

The notification tab allows you to configure validation and result notifications that will be sent out to sender and/or receiver parties for specified business service types and events. To receive these notifications, sender and receiver parties must have notification endpoints specified. These can be web-services, file locations, and emails.

Creating Notification Endpoint

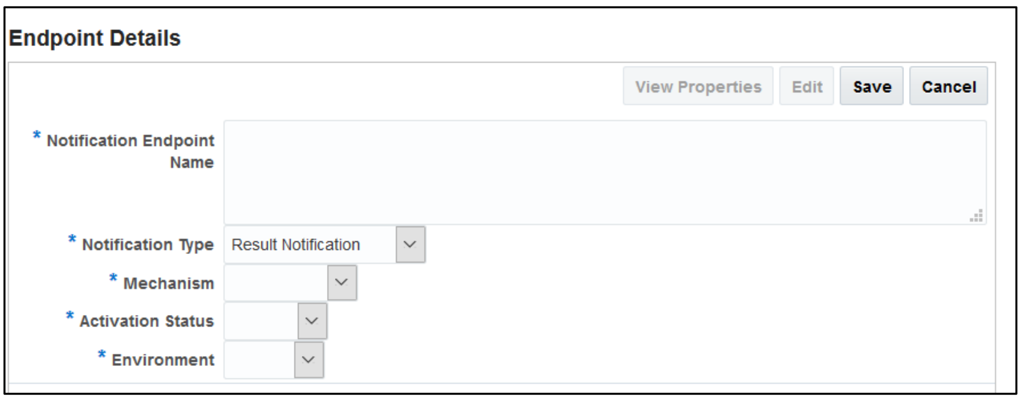
To create a new notification endpoint specification, follow these steps:

1. Click ‘New’.



2. Enter a unique name for the notification endpoint.

3. Select a notification type. There are two types of notifications.
   - Result Notification
   - Validation Notification

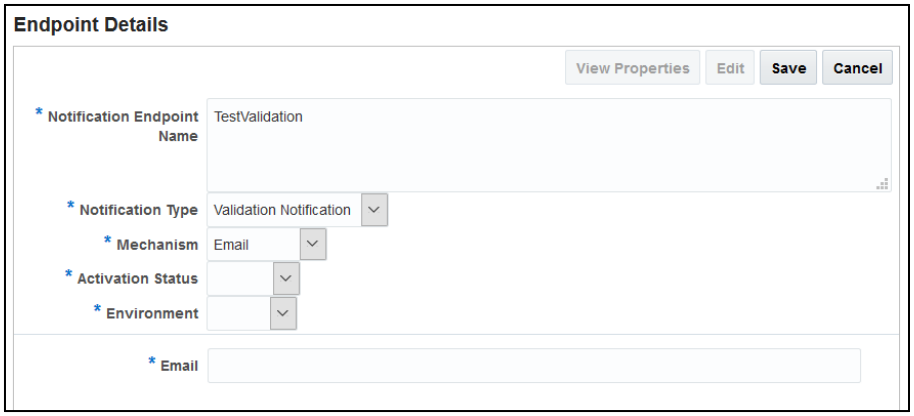


4. Select a mechanism by which the notification is to be sent. The following options are available:
   - Email
   - LocalFile
   - FTP
   - Webservice

5. Select an activation status. Active or Inactive.
6. Select an environment. Environments that were previously created under the ‘Environment’ tab are displayed here.

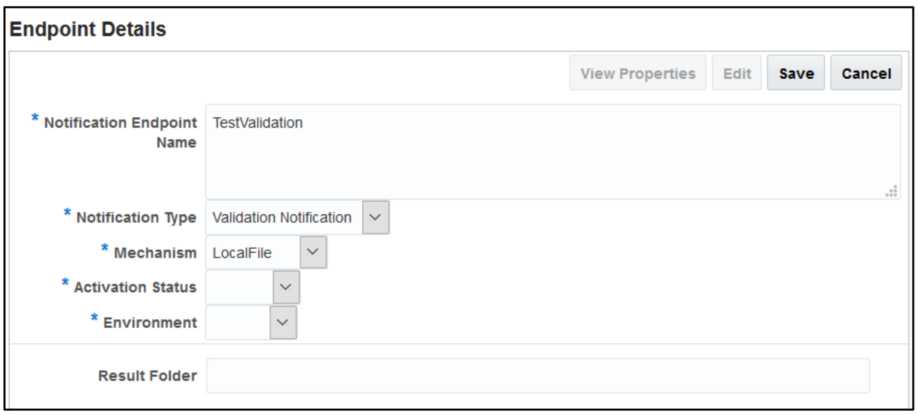
Based on the mechanism type chosen, additional fields will display.

- Selecting ‘Email’ displays the following:

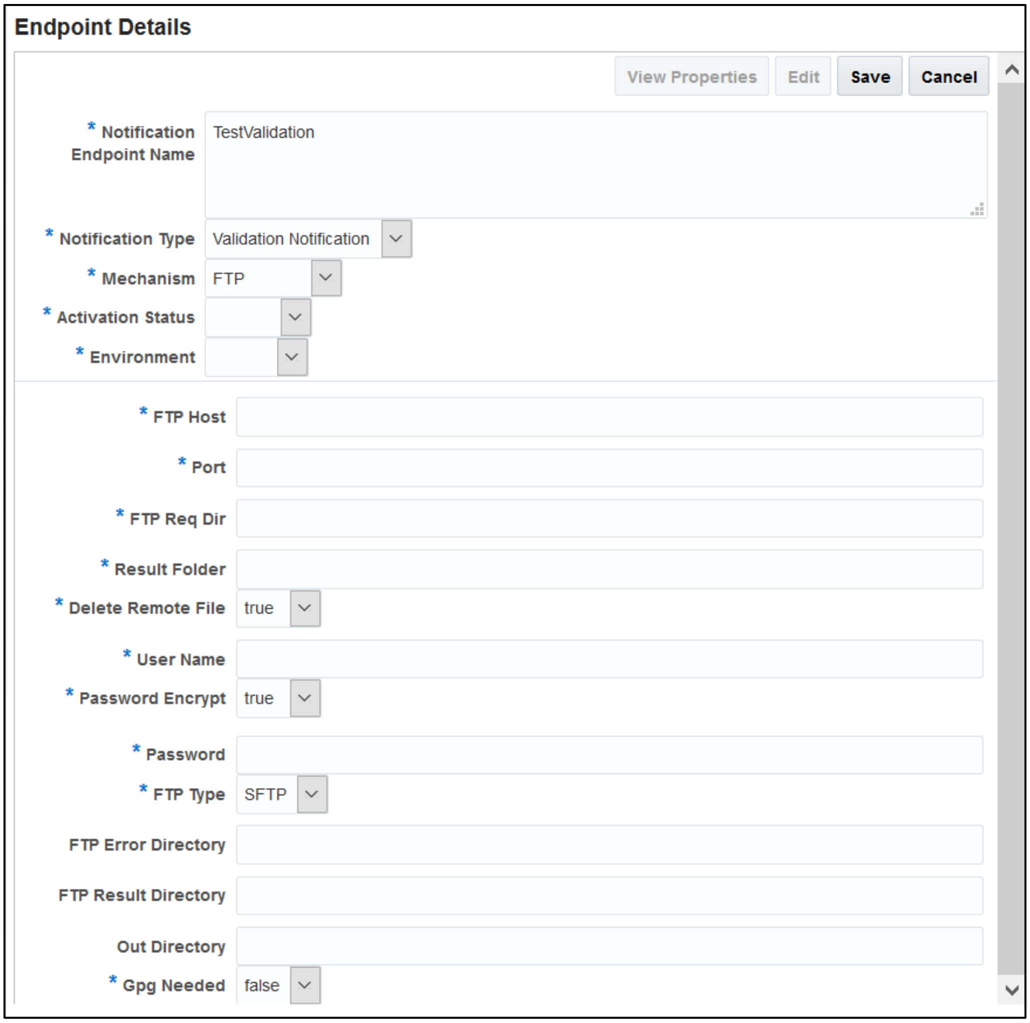


Enter the email address.

- Selecting ‘LocalFile’ displays the following:



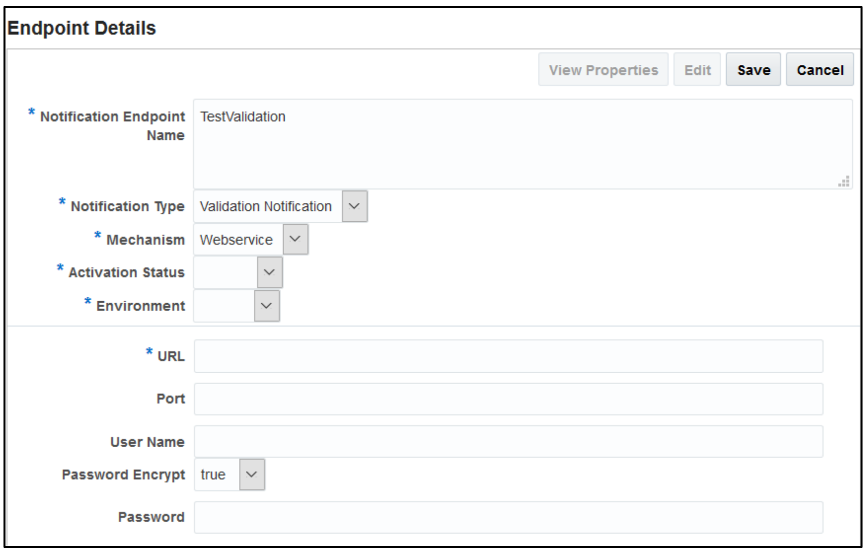
- Selecting ‘FTP’ displays the following:



Fields	Description
FTP Host	FTP server host
Port	FTP server port
FTP Request dir	The FTP Folder path where the request files are copied initially.
Result Folder	The folder path where all the successfully processed files are placed.
Delete Remote File	Selecting "True" will delete the files from staging folder after processing.
User Name	User name to connect to FTP Req Dir
Password Encrypt	Is FTP password encrypted.
Password	Password to connect to FTP Req Dir

FTP Type	Type of the FTP. We are supporting SFTP, FTP, AUTH-SSL, AUTH-TSL, IMP-SSL-FTP, IMP-TSl and IMP-TSL types.
FTP Error Directory	Enter FTP error directory path
FTP Result Directory	Enter FTP result directory path
Out Directory	Enter Out directory path
Gpg Needed	If set to true, GPG user password and GPG password encrypt fields needs to be filled. This is required when sender party is sending request filed in GPG encrypted format.

- Selecting 'Webservice' displays the following:

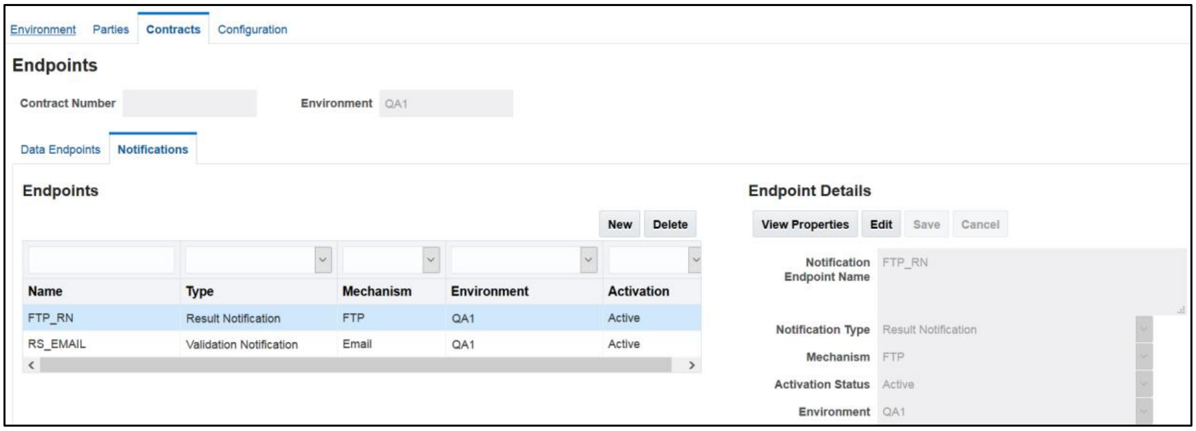


Fields	**Description**
URL	FTP server host
Port	FTP server port
User Name	Enter a user name
Password Encrypt	Select true/ false if password is encrypted
Password	Enter a password to connect

Editing a Notification Endpoint

To edit an existing notification endpoint, follow these steps:

1. Select the row of the endpoint you wish to edit. Endpoint details are displayed and the 'Edit' button is activated.

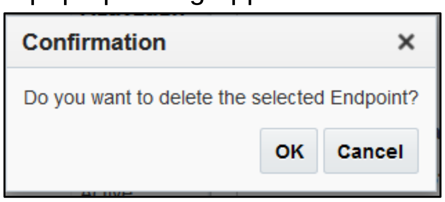


2. Click ‘Edit’ and make the changes.
3. Click ‘Save’ once you’ve completed editing.

Deleting a Notification Endpoint

To delete an endpoint, follow these steps:

1. Select the row of the notification endpoint you wish to delete.
2. Click ‘Delete’.
   A pop up dialog appears for confirmation.



3. Click ‘Ok’ to delete the endpoint.

Accessing Partner Config XML

The Configuration tab allows you to access the ‘Partner Config XML’ file. All the settings and activities you perform through AdminView are reflected in this XML.

You can set the Partner Config XML to following types:

- Full XML – Displays full configuration XML content.
- Active XML – Displays only configurations that have been set to active.

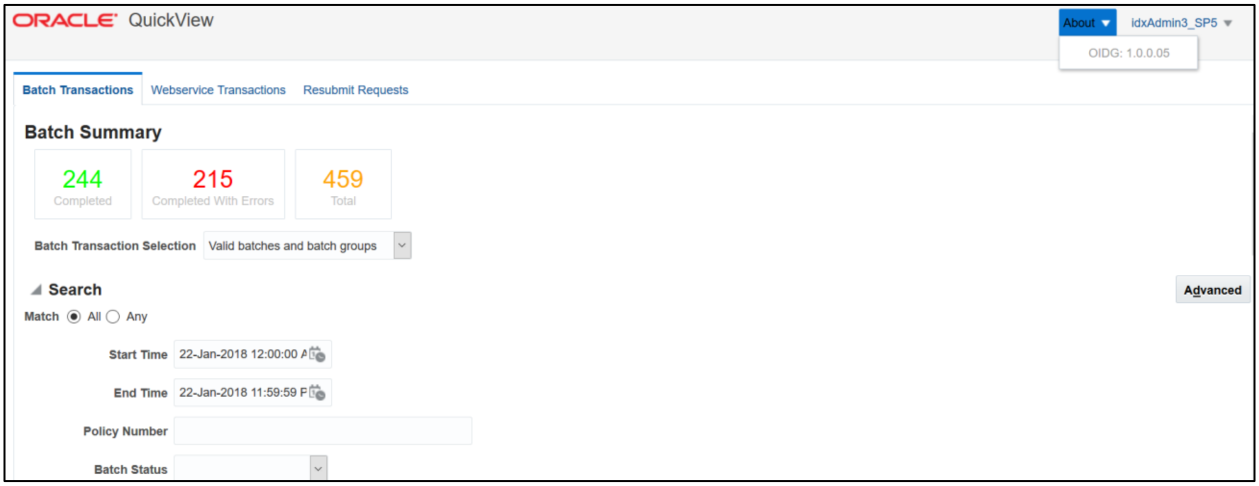
Navigating through XML

You can navigate two ways in this XML:

1. Find – Enter the keyword that you are looking for, and click search.
2. Go to Line – Enter the line number where you wish to navigate.

QuickView User Interface

A successful log in places you on the home page of OIDG portal. Click the 'QuickView' icon under Application tab to access the QuickView application. A new tab starts in your browser where you can use this application.



There are three tabs located at the top left and two options on the right; an About link and a Logout link. The About link displays version information when clicked.

The three available tabs include:

1. Batch Transactions – This tab allows you to view batch transactions and batch summary.
2. WebService Transactions – This tab allows you to view web service transactions and transactions summary.
3. Resubmit Requests – This tab allows you to resubmit failed outbound transactions.

Batch Transactions

The Batch Transactions tab is selected by default when you launch QuickView. This section will help you to learn about using and monitoring batch file activities.

Viewing the Batch Summary

The batch summary totals at the top of the tab are based on the results of your search criteria. When you log in to the application, search criteria is empty and Batch Transaction Selection drop-down is set to 'Valid batches and batch groups' by default. Once you enter search criteria, set the 'Batch Transaction Selection' drop-down and click Search, you will see the search results and the updated summary totals. Search criteria and summary totals are maintained while switching tabs.

‘Batch Transaction Selection’ drop-down allows you to filter the search results for valid or invalid batches and batch groups.

Valid batches and batch groups

Setting the drop-down to ‘Valid batches and batch groups’ will filter the search results for the transactions that are completed or completed with error.

Invalid batches and batch groups

Setting the drop-down to ‘Invalid batches and batch groups’ will filter the search results for the transactions that failed to initiate.

Start Time and End Time search criteria fields are defaulted with current date and time.

Using Calendar Icon

Click the calendar icon to select a start and end time. If you select only a date, time is set by default as shown below.

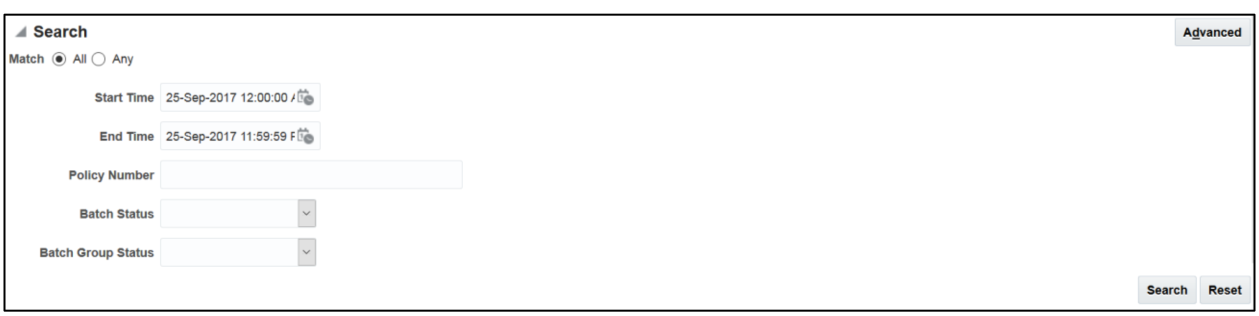
- StartTime:25-Sep-2017 12:00:00 AM
- EndTime: 25-Sep-2017 11:59:59 PM

Batch summary totals may not always agree with the total number of transactions in the grid below. Transactions from a recent batch job could still be in process and not yet included in the grid. The summary totals are the expected numbers. It may take some time for all the transactions in a batch group to be created.

Note: The time zone is set to GMT for all the Start Time/ End Time.

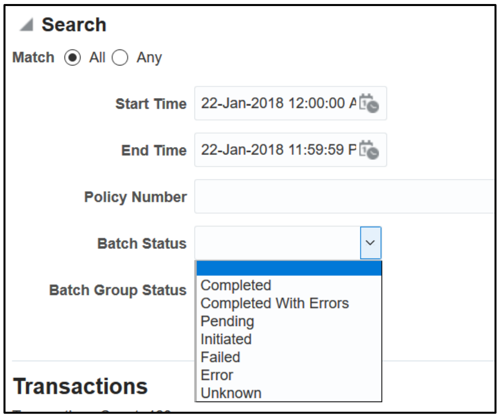
Searching for Transactions

To find a specific transaction(s) use the search panel located below the batch summary totals. This section filters the transactions that you wish to view.



To Do a Search:

1. You can search on one or more criteria. The more criteria you include, the more defined your results. Select one or more criteria. Available fields include:



Field	Description
Batch Transaction Selection	Select if you want to see results of valid batch requests or invalid batch requests. A batch is invalid when none of its requests can be initiated. Default selection is valid.
Start Time/End Time	Select the start time and end time using the calendar icon to filter the transactions happened during between that periods.
Policy Number	Enter the policy number if you want to search for a specific transaction by policy number.
Batch Status	Select the batch status using the drop down. The available statuses are: a) **Completed**: Transaction that are successfully completed. b) **Completed with error**: Transactions that belong to batches that have at least one failed transaction. c) **Pending**: Transactions waiting for outbound processing to complete. d) **Initiated**: Transactions that are received and waiting for inbound processing to complete. a) **Failed**: There are chances of getting failed transaction due to communication interference with the external system or system timeout during the transaction processing. Those

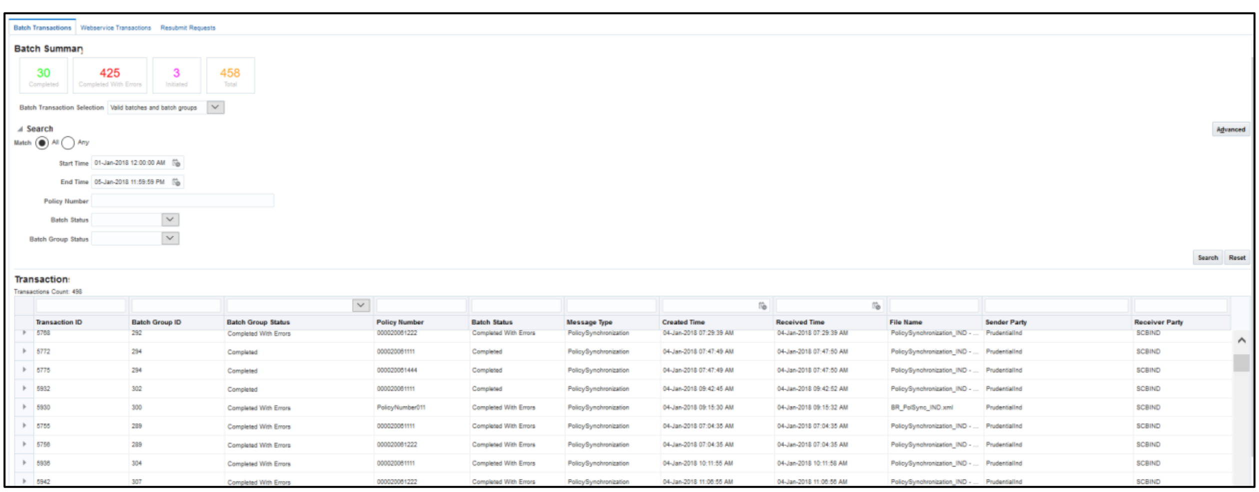
	failed transactions will be available for retry under Resubmit Request tab. b) **Error**: Transactions that reported the following errors: a. XMLSchemaErrror b. BusinessRuleValidationError c. CommunicationError d. BusinessServiceError e. ApplicationError **e) Unknown:** Unknown status in the detail section is shown when the group/batch/transaction is either missing or the associated error log entries are missing. To know more about these, see 'Viewing Transactions' topic.
Batch Group Status	The status of entire batch group.

Note:

- A batch group status of "Completed" indicates that every individual transaction in the batch completed successfully with no errors.
- A batch group status of "Completed With Errors" indicates that at least one transaction in the batch resulted in an error.

2. Enter your criteria. For better results, be as specific as possible.

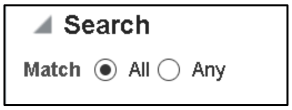
   For example, if you enter duration using the Start Time / End Time field and click search button, you will see a list of transactions created within that time interval of time. Based on other search criteria such as batch status, policy number, etc., transaction row count and total number of rows will vary.



3. Click Search to search for matching transaction records based on your input criteria.
4. Click Reset to clear all search fields and reset the search criteria.

Note:

By using Match values “All” or “Any”, you can control how your search criteria are matched against the result set.

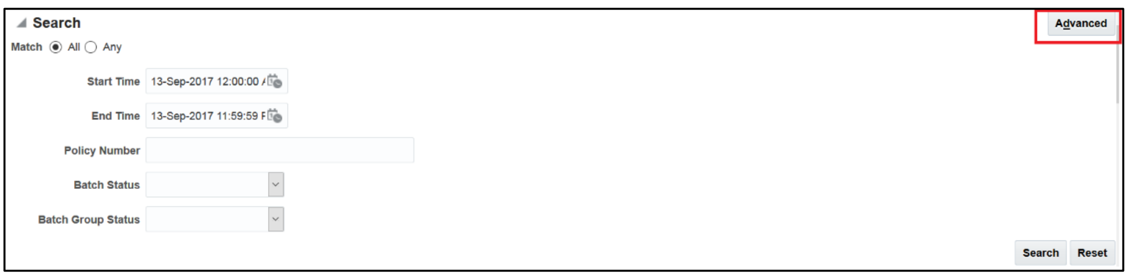


“All” specifies that only results that match **all** the criteria should be returned. “Any” specifies that one or more of the criteria must match each record in the result set.

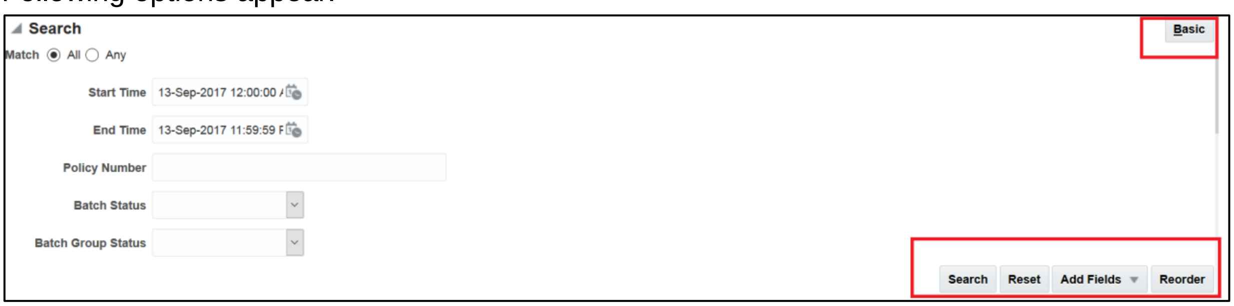
Adding fields in the search panel

QuickView allows you to add more fields to further filter your search results. To add more search fields follow the steps below:

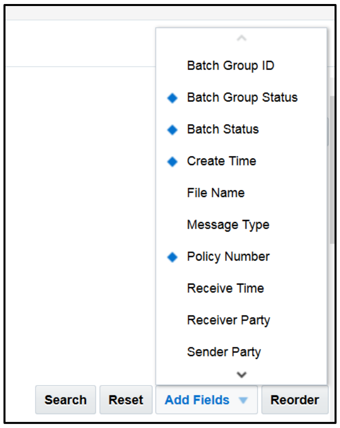
1. Click the ‘Advanced’ button.



Following options appear.



2. Click the ‘Add Fields’ drop down.



The fields containing a blue mark in front of them are default options.

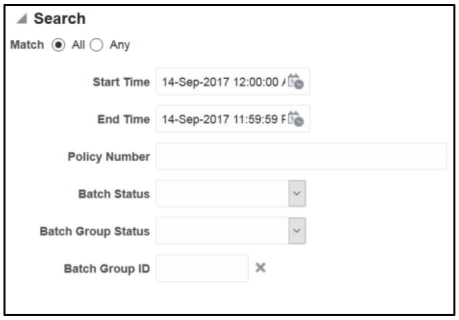
3. Click any of the options to add them to the search criteria. This enhances filtering capabilities for more precise control. The following search fields are supported:

Field	Description
Batch Group ID	A unique ID assigned to a batch group.
File Name	File name
Message Type	Please see Transaction Messages for more information.
Receive Time	The time the message was received.
Receiver Party	A short abbreviated name for the party who is receiving the request.
Sender Party	A short abbreviated name for the party who is sending the request.
Status	Please see 'Viewing Transactions' for more information.
Transaction ID	A unique ID assigned to a transaction request.

Note: The fields mentioned in the topic 'Searching your transactions' are set as default. Those fields can neither be removed nor added using the 'Advanced' option.

4. Once you've added fields you can use the same method described in 'Searching your transactions' to search for policies or transactions.

To delete search fields click the 'X' icon located next to the field as shown below.

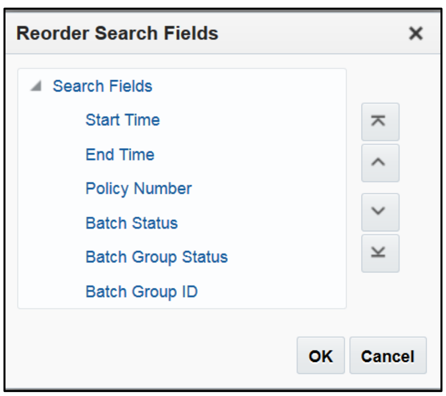


Note: The Search option changes are for the current session only. Changes are not preserved after logging out.

Reordering Search Fields

QuickView allows you to reorder the search fields in the search panel. To reorder search fields:

1. Click the ‘Advanced’ button in the search panel then click Reorder. A Reorder Search Fields dialogue box is displayed.



2. Select the specific field that you wish to move up/down in the search panel.
3. Click icon to move up or icon to move down the selected field.
   Or icons move the selection to uppermost and lowermost locations respectively.
4. Click ‘Ok’ to save your changes.

Note: Clicking the ‘Reset’ button will undo the changes and return the search panel back to its default settings.

Viewing Transactions

Search results are displayed in the lower portion of the tab. The Batch Summary Totals at the top of the tab are updated with the actual number of transactions returned. The maximum number of transactions displayed is 900.

Remember, the batch summary is generated based upon the completed transaction set which might not be complete when you are looking at the summary. The Transactions table contains the actual number of transaction records to be processed with. It displays completed transactions as well as in-process transactions.

The Transactions table displays the following details:

- **Transaction ID:** A unique ID assigned to each transaction.

- **Batch Group ID:** A unique ID assigned to a group of batched transactions. A batch group can contain a zip file of other batches, XML files or GPG files.

- **Batch Group Status:** Represents the status of batch group.
    - **Completed:** The batch group is successfully completed all transactions.
    - **CompletedWithErrors**: At least one transaction in the batch group failed but all transactions were processed.
    - **Pending:** At least one transaction in the batch group has not yet been processed.

    - **Initiated:** Batch processing has begun.

    - **Failed:** There are chances of getting failed transaction due to communication interference with the external system or system timeout during the transaction processing. Those failed transactions will be available for retry under Resubmit Request tab.

    - **Error:** Transactions that reported the following errors:
        - XMLSchemaErrror
        - BusinessRuleValidationError
        - CommunicationError
        - BusinessServiceError
        - ApplicationError

    - **Unknown:** Appears when the group/batch/transaction is either missing or the associated error log entries are missing.

- **Policy Number:** The policy number taken from the request message.

- **Status:** The overall transaction status.
    - **Completed**: The transaction successfully completed.
    - **Error**: The transaction failed schema or business rule validation.
    - **Pending**: Inbound processing and validation has completed but outbound processing is still underway.
    - **Failed**: Outbound processing has encountered an error.

- **Message Type:** See Transaction Messages.

- **Receive Time:** The time the request was received.

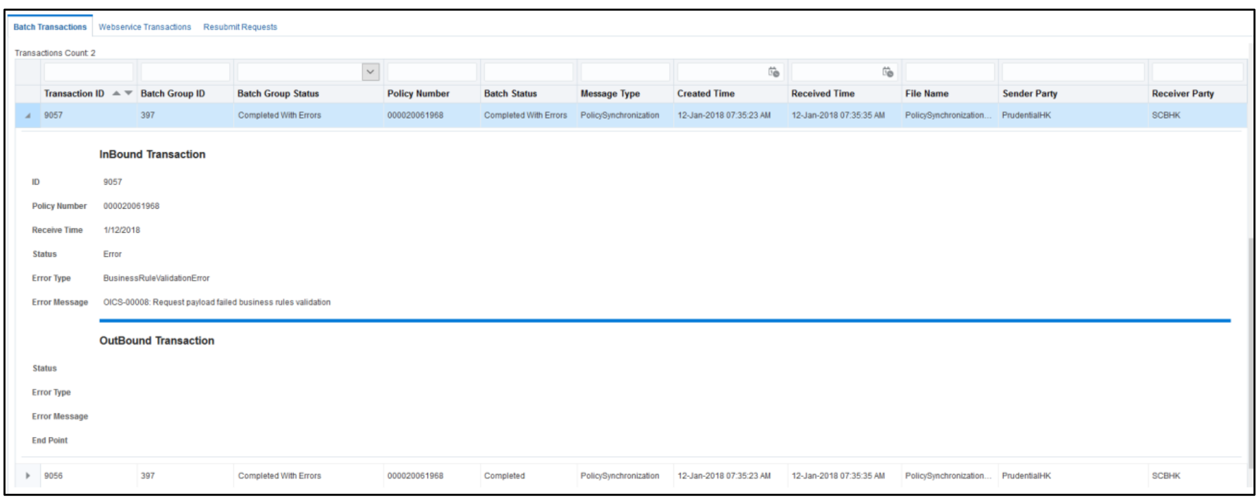
- **File Name:** Name of the file containing the transaction request.
- **Sender Party:** The sender party's short name key taken from the request message.
- **Receiver Party:** The receiver party's short name key taken from the request message.

Transaction details can be viewed by using the expand icon. Details vary depending on the transaction status:

- If the transaction is completed:
  You see 'No data to display' after you expand the row.
- If the transaction is Pending:
  You see 'No data to display' after you expand the row.
- If the transaction is completed with errors:
  You see error details about inbound and outbound transaction processing.

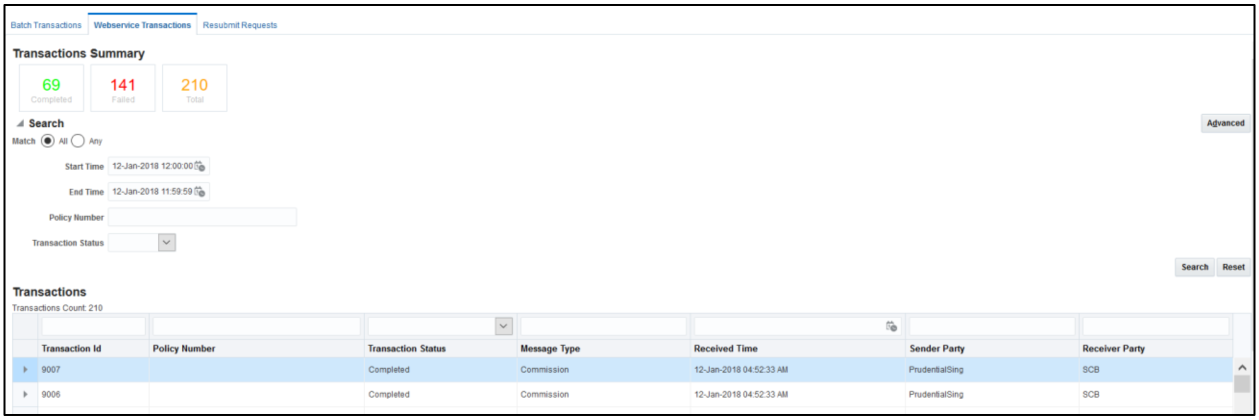
Inbound and Outbound transactions

Expand those transactions that are completed with errors to view inbound/outbound transactions.



WebService Transactions

Web service transactions can be viewed and monitored in the WebService Transactions tab.



Viewing the Transactions Summary

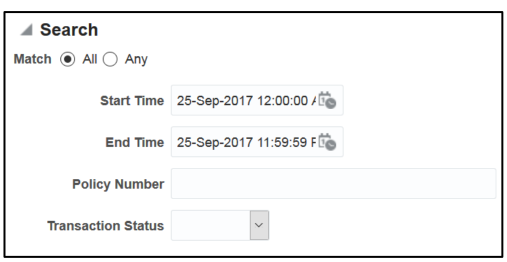
The transaction summary totals at the top of the tab are computed based on your search criteria. When you log in to the application and click WebService Transactions tab, search criteria is empty by default. Once you enter search criteria and click Search, you will see the search results and the updated summary totals. Search criteria holds the summary totals while switching tabs.

By default Start and End Time displays with current date and time.

Using Calendar Icon

Click the calendar icon to select a start and end time. If you select only a date, time is set by default as shown below.

- StartTime:25-Sep-2017 12:00:00 AM
- EndTime: 25-Sep-2017 11:59:59 PM



Note: The GMT time zone is used for all time values.

Searching for web service transactions

To find a specific transaction(s) use the search panel located below the transaction summary totals. This section filters the transactions that you wish to view.

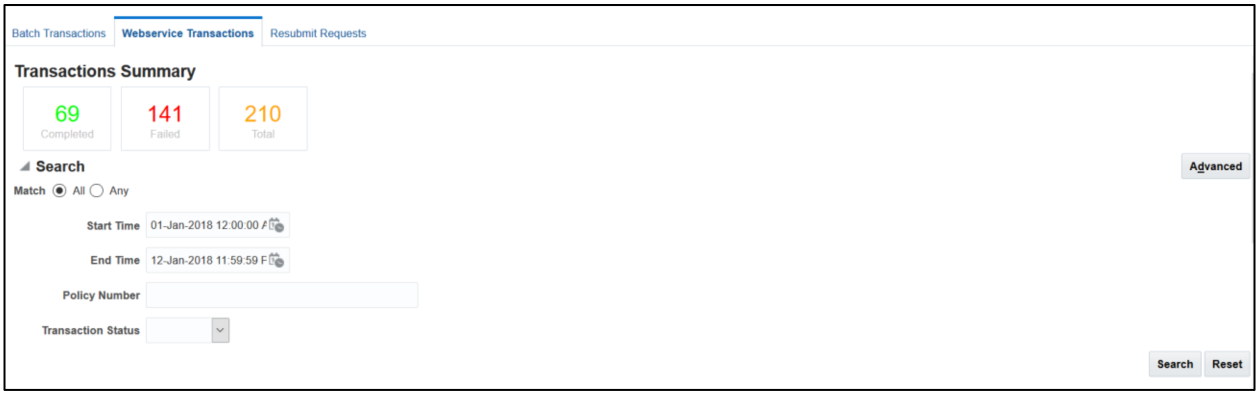
To Do a Search:

1. You can search on one or more criteria. The more criteria you include, the more defined your results. Available fields include:

Field	Description
Start Time/End Time	Select the start time and end time using the calendar icon to filter on the transactions that happened during that period.
Policy Number	Enter the policy number if you wish to see the transaction for that specific policy number.
Transaction Status	Select one of the following options in the drop-down to filter the search results by transaction status: c) **Completed**: Transactions that successfully completed. d) **Pending**: Pending transactions. Inbound processing has completed but outbound has not. e) **Failed**: Failed transactions. There are chances of getting failed transaction due to communication interference with the external system or system timeout during the transaction processing. Those failed transactions will be available for retry under Resubmit Request tab. f) **Error**: Transactions that reported the following errors: a. XMLSchemaErrror b. BusinessRuleValidationError c. CommunicationError d. BusinessServiceError e. ApplicationError To know more about these errors, see Transaction Errors topic.

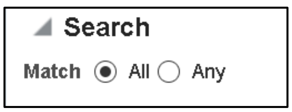
2. Enter your criteria. For better results, be as specific as possible.

   For example, if you enter a search time period using Start Time/End Time fields and click the search button, you will see a list of all policies created within that time interval. Summary counts by transaction status are shown at the top of the page. The corresponding results are shown in the table below the Search panel.



Note:

A Match option is provided that will allow you to filter your search results by matching any one of or all of the given criteria.

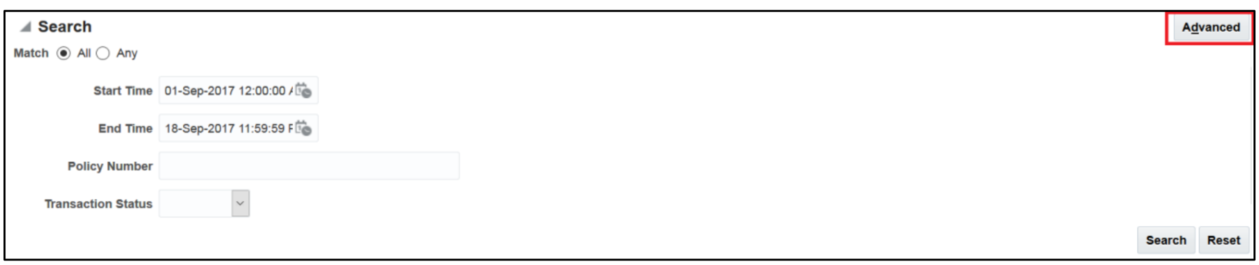


'All' will only return results that match all criteria values.
'Any' will return results that match any one or more of the criteria values.

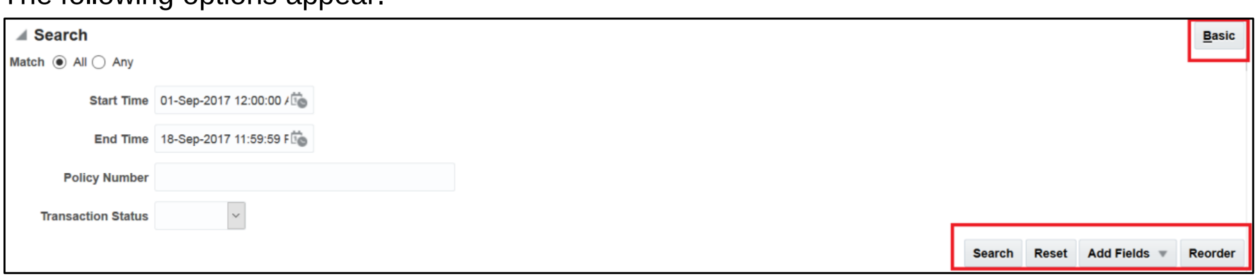
Adding fields in the WebService Transactions' search panel

QuickView also allows you to add more search fields to filter your search results. To add more search fields follow these steps:

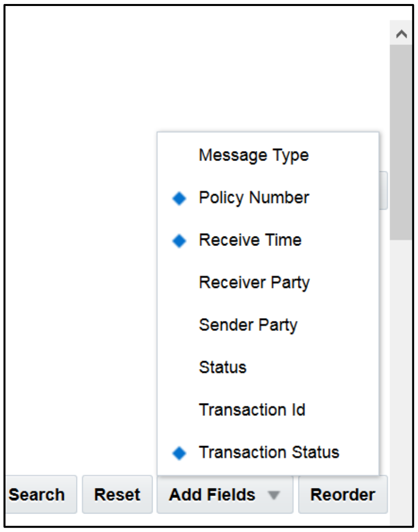
1. Click the 'Advanced' button as shown below.



The following options appear.



2. Click the 'Add Fields' drop down.



Fields with a blue mark in front of them are default options.

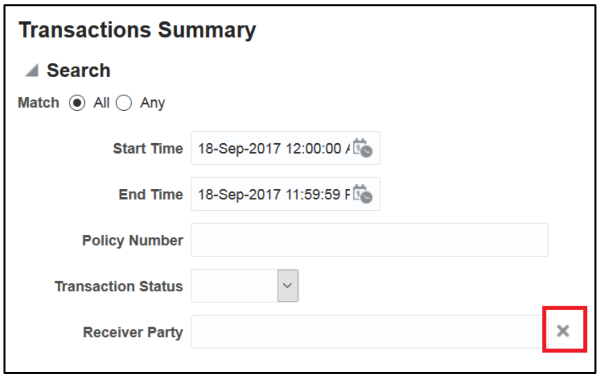
5. Click any one of the options to add them as search criteria. The following options are provided:

Field	Description
Message Type	Message Type can be: Policy Migration, Policy Reconciliation
Receive Time	The time the message was received.
Receiver Party	A short abbreviated name for the party who is receiving the request.
Sender Party	A short abbreviated name for the party who is sending the request.
Status	Status can be: Completed, Pending, Failed, or Error For more information, see 'Viewing web service transactions'.
Transaction ID	A unique ID assigned to a transaction request.

Note: The fields mentioned in 'Searching your web service transactions' are displayed by default. Those fields neither can be removed nor added using the 'Advanced' option.

6. Once you've added additional search fields, you can use the same method described in '[Searching your web service transactions]' to search with them.

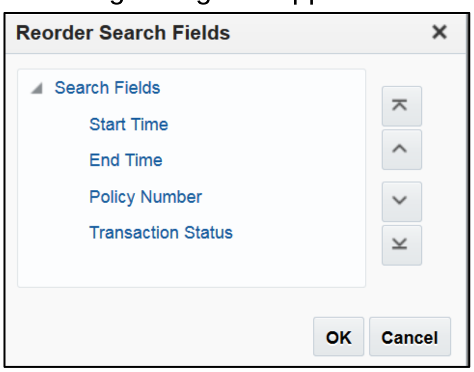
To delete search fields click the 'X' icon located next to the field as shown below.



Reordering search fields

QuickView includes functionality to reorder the display of your search criteria. To reorder them follow these steps:

1. Click the 'Advanced' button in search panel and click 'Reorder'.
   Following dialog box appears.

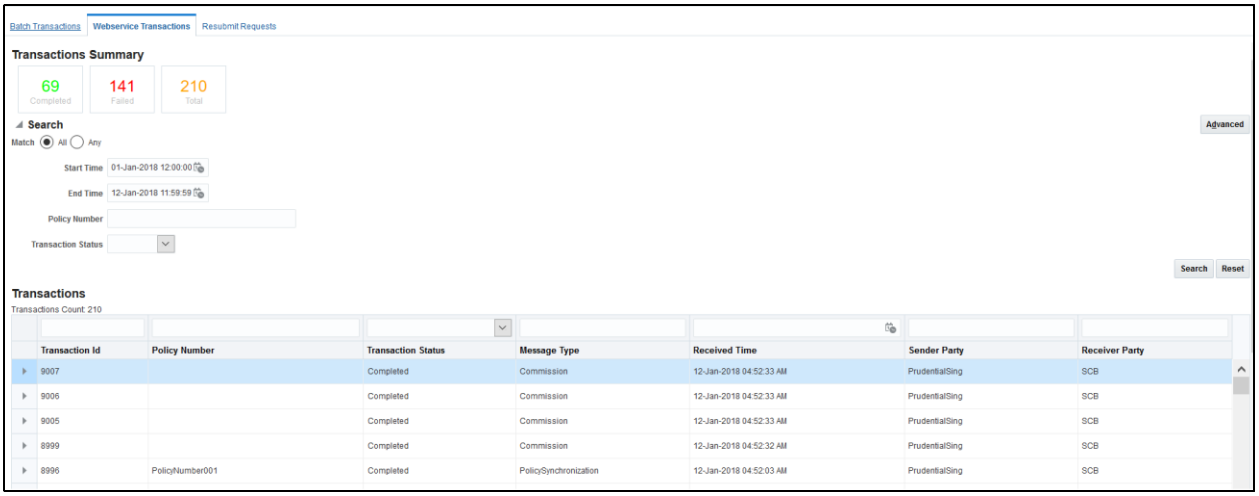


2. Select the specific field that you wish to move up/down in the search panel.
3. Click icon to move up or icon to move down the selected field.
   Or icons move the selection to uppermost and lowermost locations respectively.
4. Click 'Ok' to save your changes.

Note: Clicking the 'Reset' button will undo the changes and set them back to their original order.

Viewing web service transactions

Search results are displayed in the Transactions table.

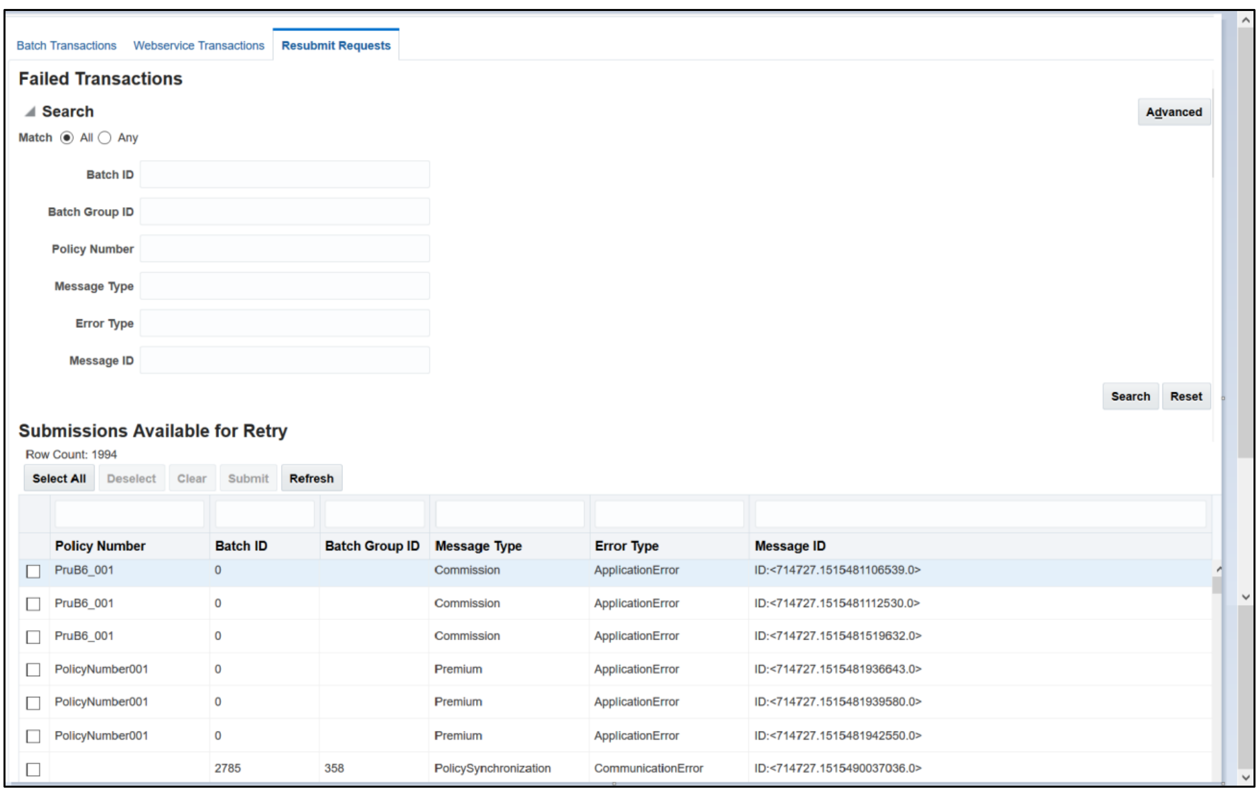


Expand the failed transactions to view error details.

Resubmit Requests

This tab allows you to resubmit requests that have passed schema and business rule validation but failed submission to external systems.

Click the ‘Resubmit Requests’ tab.



Upon entering this tab, you are presented with a search panel to query the list of failed transactions. By default, the fields are empty. Based upon the search criteria you enter, failed transactions will display in the table below the search area.

Searching your failed transactions

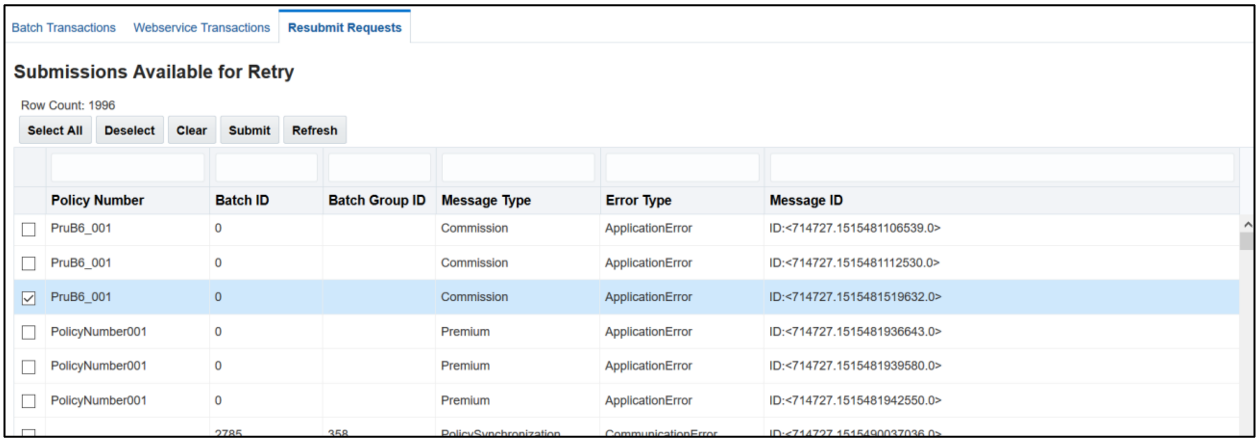
In search panel, you will find the following search fields that are available to filter your list of failed transactions:

Field	Description
Batch ID	A unique ID representing a batch request.
Batch Group ID	A unique ID representing a batch group.
Policy Number	The policy number of a specific policy you wish to match.
Message Type	Message Type can be: ▪ Policy Migration ▪ Policy Reconciliation
Error Type	Error Type can be: ▪ CommunicationError ▪ BusinessServiceError ▪ ApplicationError
Message ID	A unique ID representing the transaction.

Enter your criteria. For better results, be as specific as possible.

Resubmitting your requests

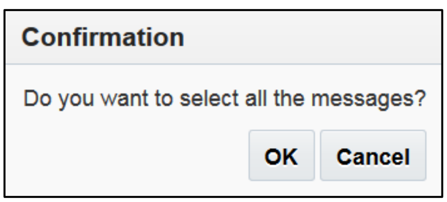
Your search results are displayed in the 'Submissions Available for Retry' table.



Each transaction in the table contains a selection box. Mark the check box for each of the records you wish to perform actions on. Some actions are only available once you select a transaction.

Select all

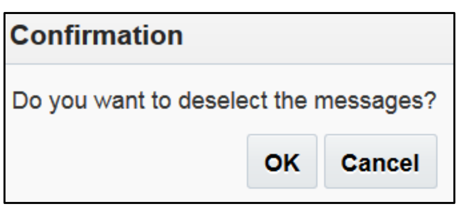
Clicking 'Select All' will select the entire list of transactions available in the table. A confirmation pop up is presented.



Click 'Ok' to proceed with all the transactions selected.

Deselect

Clicking 'Deselect' will uncheck the check box. A confirmation pop up dialog appears as shown.



Click 'Ok' to proceed and the selected transactions are deselected.

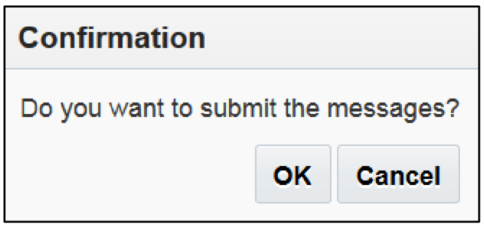
Clear

Clicking 'Clear' will remove the selected transactions from the resubmission list. A confirmation pop up dialog appears as shown.

Click ‘Ok’ to proceed and the selected transaction messages are removed from the resubmission list.

Submit

Clicking ‘Submit’ will submit the selected requests for processing. A confirmation pop up dialog appears as shown.



When you click ‘Ok’, the selected transactions are resubmitted to their respective external destinations. If a submission fails again that transaction will remain available for resubmission until you clear it.

Refresh

Click ‘Refresh’ to refresh reapply the search. This allows you to refresh the page to see the new transaction summary after having resubmitted transactions. Those that have processed successfully after resubmission will no longer appear in the list. Row counts are also updated appropriately.

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