

# **Oracle Insurance**

# Data Exchange Administration Guide

Release 11.0.2

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Oracle Insurance Data Exchange for Life and Annuity Engine User Guide

Release 11.0.2

#### December 2019

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### **PREFACE**

Welcome to the Oracle Insurance Data Exchange (OIDX) for Life and Annuity (LA) AdminView User Guide.

This guide discusses the following topics:

- Logging in to OIDX
- Validating users and agencies

### **Audience**

This guide is intended for OIDX for Life and Annuity Admin Users.

### **Related Documents**

For more information, refer to the following Oracle resources:

 The Oracle Insurance Data Exchange Administrators Guide. The documentation for OIDX is hosted online at: <a href="https://docs.oracle.com/en/industries/insurance/insurance-data-exchange/index.html">https://docs.oracle.com/en/industries/insurance/insurance-data-exchange/index.html</a>

### **Browsers**

OIDX for LA works with Google Chrome and Microsoft IE. Please be aware that Mozilla Firefox, MacOS Safari and Microsoft Edge may not function as intended.



If you have a popup blocker installed, you may need to disable it for OIDX to work properly. You also can enable popups for this site.

### **Clearing Temporary Files**

Because AdminView is web-based, you may need to clear out your browsers temporary file periodically.

Keeping the temporary file clear may improve performance by clearing off space from your hard drive.

## Inactivity / Timeout

OIDX for Life and Annuity, a web-based application, logs you out if you are inactive for a length of time. The default setting is **30 minutes**. If timeout does occur, log back onto the system and continue working.



# **Basic Safety Precautions**

It is recommended that you secure your computer when you need to step away to protect the integrity of your work.

### **Notational Conventions**

The following text conventions are in this document:

Convention	Description	
bold	Boldface type indicates graphical user interface elements associated with an action.	
Italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.	
Monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.	

### **Additional Information**

For more information, please go to the Oracle Insurance web site at or contact Oracle Insurance Data Exchange support at: <a href="mailto:oidxsupport\_grp@oracle.com">oidxsupport\_grp@oracle.com</a>.

## **Manual History**

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition		V 11.0	January 2018	Initial Creation
2 <sup>nd</sup> Edition		V 11.0.1	April 2018	New enhancements and fixes
3 <sup>rd</sup> Edition		V 11.0.2	December 2019	AdminView creation, new enhancements and fixes



### Chapter - 1

### **GETTING STARTED**

OIDX AdminView for LA gives you access to user setup, user details and agency setup. User data can be searched, filtered and viewed, or modified.

Prior to accessing AdminView you should have received:

- AdminView: For Example, http://example.us.oracle.com:7777/AdminView/faces/Home.isf
- Username: usernames are required.
- Password: passwords are required.

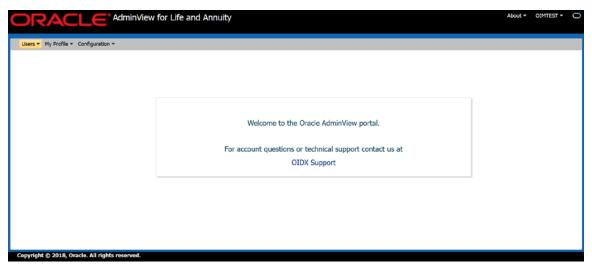
## Registering for an AdminView Account

Administrator account is created from Identity Self Service application. Please refer to the 'Creating Groups and Users' section in the OIDX Security Guide.

Administrators are assigned with OIDXAdmin role and they belong the 'IDXRoot' organization.

## Home Page

Logging in to AdminView places you on the home page. This page contains links to the available functions and a link for emailing OIDX support.



AdminView Landing Page

'About' and 'User' options appear after login at the upper right of the top menu.





Logout Option in Top Bar Menu

The About option contains information regarding the version of AdminView. The User option contains the logout option.

## **Navigation**

Navigation in AdminView works in the following way.



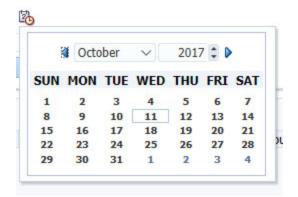
Navigation in OIDX

Icon	Description
₿	Calendar icon opens the calendar.
**	Close tab. Displayed in the upper right of the page. Closes the highlighted tab. When you have multiple tabs open, use the tab key on your keyboard to tab through the open tabs.
	Expands the closed area.
	Collapses the
▶	Expandable element. Expanding the element displays additional details.
24	Expanded element. The element has been expanded to reveal additional details.
△▼	Sort icons for search tabs. Select the column that you want to sort by. Select the up arrow to sort ascending – from newest to oldest, A-Z. Select the down arrow to sort descending – from oldest to newest, Z-A.

### Calendar Icon

Clicking the calendar icon opens a calendar where the date can be selected. All date/times are GMT.

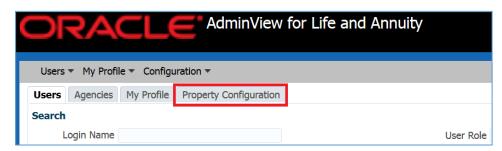




Calendar Option

### **Navigating Between Tabs**

Options and individual users/agencies open in separate tabs. Multiple tabs can be opened. Use the tab key on your keyboard to tab through tabs left to right. Only one tab is active. The active tab is white and the inactive tabs are gray.



Navigating Between Tabs

## **Closing Tabs**

Active tabs can be closed by clicking the close icon on the far right.

### **Sorting Columns**

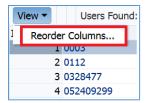
Search results columns can be sorted in ascending/descending order or alphabetically A-Z or Z-A order. Select the column where you want to sort and click the column header. Result data is then sorted by this column in either ascending/descending or A-Z/Z-A order. All results are sorted. .

Sorting holds for the current instance only. When you log out, sort values return to default. For policy and commission searches, the default sort order is by carrier. Reordering columns also returns the sort order to carrier.

## Reordering Columns

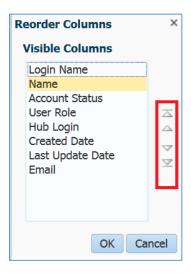
Search screens allow you to reorder the information presented. You can select to reorder columns from the view option.





View Option to Reorder Columns

A separate screen contains the columns available and the current order. Use the arrows to move columns up or down the list. Click OK to save your selection.



Selecting to Reorder Columns

Reorder selections are only for the current session. When the session ends, the column order reverts to the default.



### Chapter – 2

## WORKING IN ADMINVIEW

Oracle Insurance AdminView for Life and Annuity allows OIDX administrators to search for user and carrier information.

## Logging in to AdminView

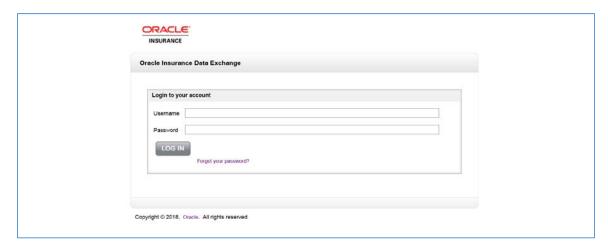
Access to OIDX requires an administrator account. Prior to accessing AdminView you should have received:

- AdminView URL: For example, http://example.us.oracle.com:7777/AdminView/faces/Home.jsf
- Username: usernames are required.
- Password: passwords are required.

Access AdminView through a login screen. To *login*, enter your username and password and click **LOG IN**.

A successful login places you on your Home Tab.

A failed login shows an error message. Please correct any errors and try again. If you cannot log in, please contact OIDX support at <a href="mailto:oidxsupport grp@oracle.com">oidxsupport grp@oracle.com</a>.



AdminView Login

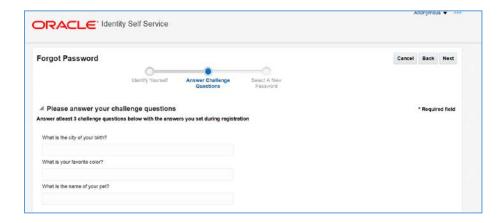
## Password Help

Password help is a part of the Oracle Identity Self Service and not a part of OIDX. Changing your password is done in the Oracle Identity Self Service application.

If you have forgotten your password you have the option of resetting your password.

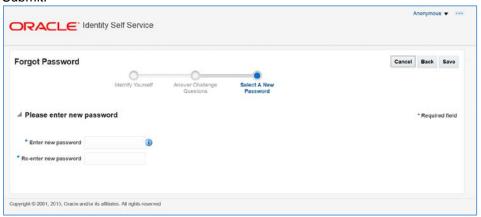
- 1. Click the 'Forgot your password?' link.
- 2. On the Oracle Identity Self Service page, enter your user login name and click Next.
- 3. Answer challenge questions selected when the account was set up and click Next.





A successful response allows you to reset your password. If you do not know the answer to the challenge questions, please contact OIM administrator.

 Enter and re-type your new password in password management screen. Click Submit.



Changing Password in Password Management



If you attempt to log in with the wrong password four times in a row, your account will be locked. A message is displayed:

"Your account has been locked. Please contact the Oracle Insurance Help Desk at <a href="mailto:oidxsupport\_grp@oracle.com">oidxsupport\_grp@oracle.com</a> to un-lock your account!"

### **Admin Users**

An administrator login allows OIDX administrators to search for user, agencies and carrier information. The options when you log in are:

- Users
- My Profile
- Configuration





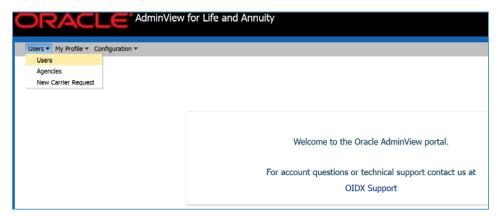
AdminView Landing Page

Administrators do not have access to policy or commission information.

## **Users**

Users tab contains following subtabs.

- Users
- Agencies
- New Carrier Requests

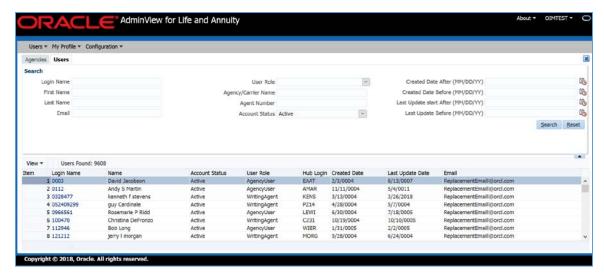


Users Subtabs

### **Users**

Administrators can search for users through this subtab. Select options to filter the information and reduce the amount of entries returned.





#### Searching for Users

- 1. Select Users from the top bar menu
- 2. In the **Search** area, enter data into one or more fields and click Search. The more search fields that are completed, the narrower the search. Available fields include:

Field	Description
Login Name	The login name for the person.
First Name	Search by the first name of the user.
Last Name	Search by the last name of the user.
Email	Search by the email address of the user.
User Role	Select the role of the user. Multiple roles can be selected by clicking the role you want and pressing the CTRL key.
Agency/Carrier Name	Search for users by agency or carrier.
Agent Number	Searches for users by agent number.
Account Status	Search for users with a specific account status. Multiple statuses can be selected by clicking the status you want and pressing the CTRL key.
	Searches for users created after the entered date. Users that were created on this date are also included.
Created Date After	Use this field and the Created Date Before to set a "Created Date" range for finding users. For example, if today is 1/4/18 and you would like to see a list of all users within the last month, you would enter 12/4/17 in the



	After field and 1/4/18 in the <b>Before</b> field.	
	Searches for users before the entered date. Users that were created on this date are also included.	
Created Date Before	Use this field and the Created Date After to set a "Created Date" range for finding users. For example, if today is 1/4/18 and you would like to see a list of all users within the last month, you would enter 12/4/17 in the <b>After</b> field and 1/4/18 in the <b>Before</b> field.	
	Searches for users with updates after the entered date. Users with updates from this date are also included.	
Last Update Start After	Use this field and the Last Update Before to set a "User Last Update" range. For example, if today is 1/4/18 and you would like to see a list of all users with updates within the last month, you would enter 12/4/17 in the <b>After</b> field and 1/4/18 in the <b>Before</b> field.	
Last Update Before	Searches for users with updates before the entered date. Users with updated from this date are also included.	
	Use this field and the Last Update Start After to set a "User Last Update" range. For example, if today is 1/4/18 and you would like to see a list of all users with updates within the last month, you would enter 12/4/17 in the <b>After</b> field and 1/4/18 in the <b>Before</b> field.	

- 3. When finished selecting search criteria, click **Search**.
- 4. Results are returned in the lower portion of the tab. Results returned will match the criteria entered. For example, if you enter three letters of the last name, the users returned will have their last names start with those three letters.



If you are searching users by several criteria, the search engine will look for all the users that contain all the criteria you selected.

#### **User Search Result Details**

Search results are displayed in the lower portion of the tab. Not all search fields are represented in the results. Not all result fields are search criteria.

- Login Name
- Name
- Account Status
- User Role
- Hub Login
- Created Date
- Last Update Date
- Email



Total users found are listed at the top of the results section along with the View option to reorder the result columns.

#### **User Search Results User Name**

The user name is a clickable link on the user search results. Click the user name to open the user details.

#### Reset Search

Click the Reset button to clear the fields and reset the search options.

#### **User Details**

Clicking the user link will navigate you to User Details tab has two subtabs.

- Carrier Setup
- Personal Information

#### **Carrier Setup**

Carrier Setup is where you can add, update, delete and validate the contracts you have with specific carriers. Once a contract relationship has been created, edits to selected fields can be done.



User Details > Carrier Setup for Selected User

### Adding a Contract

- 1. On the Carrier Setup subtab, click New.
- 2. Select the 'Company Name' using the drop down menu for whom you want to create contract.
- 3. Enter the Contract/Agent Number. Multiple contracts can be entered by listing all Contracts or Agent Numbers separated by commas.
- 4. Select 'Status' from the drop down menu.



- 5. Click 'Save and Validate'. A message is displayed 'Contract registration for invalid entry will be ignored'. Users will be notified by email once the request has been processed.
- 6. Click OK to close the message.



Message after Creating/Validating Carrier Contract Request

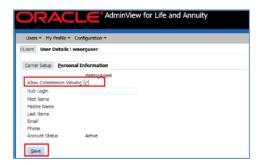
You must enter contracts for each carrier. You can enter as many requests as you need.

#### **Personal Information**

Personal information subtab is used to view the information that were used to setup the user account and allow them to view the 'Commission' tab. User details are managed outside of OIDX.



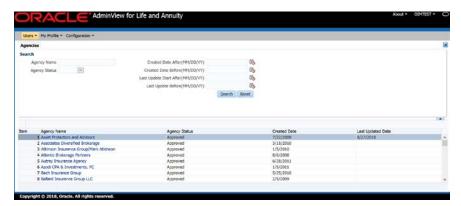
Check/ uncheck the 'Allow Commission Viewing' box to enable/ disable the 'Commission' tab for respective users.





### **Agencies**

Administrators can search for agencies. Select options to filter the information and reduce the amount of entries returned.



Agencies Tab

Click the 'Agency Name' link to view the agency details.

### **Setting Agency Status**

The 'Agency Status' can be set to one of the followings through 'Agency Details' dialog:



Setting Agency Status

#### **Approved**

Once the agency details are validated, set the agency status to 'Approved'. This will activate the agency account.

#### Rejected

If the agency account details are not validated, set the agency status to 'Rejected'. This will disable all the QuickView functionality except 'About' and 'Logout'. The respective agency will see a message when they log in to the QuickView – 'Your agency is rejected. Access to the data is restricted'.



### Pending

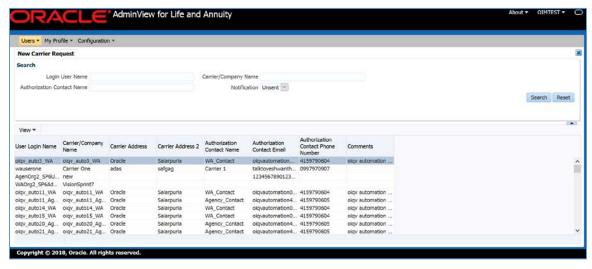
If the agency account is updated within past six months, set the agency status to 'Pending' until the validation process. This will disable all the QuickView functionality except 'About' and 'Logout'. The respective agency will see a message when they log in to the QuickView – 'Your agency is not approved yet. Access to the data is restricted'.

#### Not Set

If the agency account is in pending status and the account details are not updated in past six or more than six months, set the agency status to 'Not Set'. Users will be redirected to the reregistration form.

### **New Carrier Request**

Administrators can search for a carrier on the New Carrier Request tab.



New Carrier Request Search

- 1. To search for a carrier or to obtain information regarding a carrier. Select Users > New Carrier Request from the top bar menu.
- 2. In the **Search** area, enter data into one or more fields and click Search. The more search fields that are completed, the narrower the search. Available fields include:

Field	Description
Login User Name	The login name for the person who has access to OIDX application/OIDX Users
Authorized Contact Name	The name of the contact person for the carrier
Carrier/Compa ny Name	The carrier/Company Name
Notification	The preferred method of contact for the contact person at the carrier



- 3. When finished selecting search criteria, click **Search**.
- 4. Results are returned in the lower portion of the tab.



If you are searching carriers by several criteria, the search engine looks for all the carriers that contains all the criteria selected.

#### **Carrier Search Results**

Search results are displayed in the lower portion of the tab. Not all search fields are represented in the results. Not all result fields are search criteria.

- User Login Name
- Carrier/Company Name
- Carrier Address
- Carrier Address 2
- Authorization Contact Name
- Authorization Contact Email
- Authorization Contact Phone Number
- Comments

Total records found are listed at the top of the results section along with the View option to reorder the result columns.

#### Reset Search

Click the Reset button to clear the fields and reset the search options.

## My Profile

The admin profile information is the same information used to create your account in to OIDX. You can access your user profile from the top bar menu. The personal information cannot be changed.



### Configuration

Administrators can configure the application through this menu.





#### Property configuration for admin users

- 1. To configure property select Configuration > Property Configuration from the top bar menu.
- 2. Click the 'Edit' button and enter following details.

Field	Description
Mail SMTP Host	The SMTP host name from where email notifications are routed.
Notification Email	The email ID from which notifications are sent.
Base Organization Name	It's always IDXroot. All the organizations and users are created under this base organization.
Logout URL	The URL where users are navigated after logging out. Logout option will not function if this field is blank.

3. When finished, click Save.



### Chapter – 3

### **ADMINISTRATION API**

This section describes Admin API available for OIDX LA engine. This API serves to control OIDX schedulers and to work with encryption/decryption of configuration files/string or sensitive data inside in files.

To call Admin API methods a tool like SOAP-UI could be used. All the screenshots are taken from SOAP-UI in this chapter.

# Roles and Security

Administrative API is separated from all other OIDX APIs and is not available for external users. Methods could be called from the internal "OCCN" network.

To call API methods, the user should have "OIDXAdmin" role and authenticated with username/password via "basic authentication" mechanism.

### Schedule API

To start/stop OIDX process we have 5 schedule managers in LA Engine. There is one main scheduler "Task Scheduler" that controls 3 application schedulers: "Data Move", SO Submit" and "NB Submit".

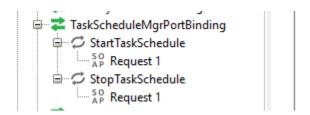
Every manager uses a SOAP web service call to start / stop respective scheduler. There is no specific order how to start or stop schedulers, but if "Task Scheduler" is not started no new application jobs will be processed.

Please note that "stop" request will terminate process immediately. Current job should be finished first and then scheduler will be terminated.

Starting of the scheduler that started already or stopping of the stopped scheduler will have no negative impact and will not cause error or return error message.

### Task Schedule Manager

URI: <a href="https://cserver:port>/OIDXAdminAPI/idx/TaskScheduleMgr?wsdl">https://cserver:port>/OIDXAdminAPI/idx/TaskScheduleMgr?wsdl</a> Methods: StartTaskSchedule, StopTaskSchedule



#### Start request / response

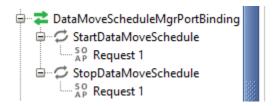


#### Stop request / response



### **DataMove Schedule Manager**

URI: https://<server:port>/OIDXAdminAPI/idx/DataMoveScheduleMgr?wsdl Methods: StartDataMoveSchedule, StopDataMoveSchedule



#### Start request / response



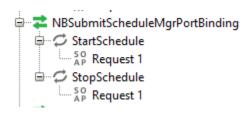
#### Stop request / response



## **NB Submit Schedule Manager**

URI: https://<server:port>/OIDXAdminAPI/idx/NBSubmitScheduleMgr?wsdl

Methods: StartSchedule, StopSchedule



Start request / response



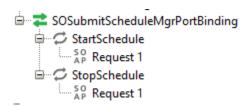
```
| Scapenv:Envelope xmlns:scapenv="http://schemas.xmlscap.org/scap/envelope/">
| Scapenv:Header/>
| Scapenv:Header/
| Scapenv:Header/>
| Scapenv:Header/
```

#### Stop request / response

```
| Scoapenv:Envelope mins:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:idxe=" | SiEnvelope xmlns:Se="http://schemas.xmlsoap.org/soap/envelope/">
| Scoapenv:Beader/>
| SiEnvelope xmlns:Se="http://schemas.xmlsoap.org/soap/envelope/">
| SiEnvelope xmlns:Se="http://schemas.xmlsoap.org/soap/envel
```

### **SO Submit Schedule Manager**

URI: <a href="https://cserver:port>/OIDXAdminAPI/idx/SOSubmitScheduleMgr?WSDL">https://cserver:port>/OIDXAdminAPI/idx/SOSubmitScheduleMgr?WSDL</a> Methods: StartSchedule, StopSchedule



#### Start request / response

#### Stop request / response

## **Error handling**

In case of error, error message will be available as a response

```
| Sangerv:Envelope mins:soapenr**http://schemes.omloop.org
```



## Security API

For the security reason OIDX encrypts some parts of the data files or entire files during backup in addition to PGP encryption. Also some parts of the client's configuration could be encrypted. In order to work with encrypted strings or files, OIDX administrator could use Security API webservices.

When Security API methods are called – a notification e-mail is generated and send to OIDX administrator DL with call details.

URI: https://<server:port>/OIDXAdminAPI/Security/SecurityToolsService?wsdl

```
SecurityToolsPortBinding

decryptAcordScrutityFile
decryptConfigurationString
decryptDataString
decryptWholeFile
encryptandHashAcordFile
encryptConfigurationString
encryptDataString
encryptDataString
encryptWholeFile
generateNewSecurityKey
```

### **DecryptAcordSecurityFile**

This method could be applied to ACORD XML files from backup folder with that satisfy the following mask: \*\_en\_\*.xml.gpg. A PGP decryption should be called first and result of the decryption should be put at <IDXROOT>/decrypt folder. The file name must be passed as a parameter to web service call.

As a result, a new file will be created in the same folder with dw- prefix and all encrypted XML tags will be unencrypted.

## **DecryptConfigurationString**

In the client configuration files, some fields like sFTP passwords or encryption keys are encrypted. To decrypt such values, provide them as parameters of the web service call.



The returned result is an unencrypted string.

### DecryptDataString

This method is similar to DecryptAcordSecurityFile, but it could be used when fist one ACORD XML tag should be decrypted.

Encrypted string must be passed as a parameter to web service call.

```
| Soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:idx="http://idx.com/">
| Soapenv:Header/>
| Soapenv:Body>
|
```

The returned result is an unencrypted string.

## DecryptWholeFile

This method is similar to DecryptAcordSecurityFile, but it should be used for NAILB 800 and NAILBA 900 files. Unlike ACORD XML – NAILBA files are completely encrypted in addition to PGP.

File from the backup folder should be unencrypted first and result should be put at <IDXROOT>/decrypt folder.

The file name must be passed as a parameter to web service call.



As a result – new file is generated with no encryption.

### **EncryptAndHashAcordFile**

This method could be used to encrypt sensitive ACORD XML tags in the file and/or to replace them with some dummy values.

List of tags to encrypt located at: <IDXROOT>/config/AcordEncryptTag.txt List of tags to hash located at: <IDXROOT>/config/AcordHashTag.txt Generally those two lists are not identical.

File to encrypt should be placed into <IDXROOT>/encrypt folder. File name must be provided as a parameter to web service call.

As a result, two new files are generated file \*\_en\_\* in its name contains encrypted sensitive XML tags; file with \*\_hs\_\* - contains values substituted with some dummy values.

## **EncryptConfigurationString**

In the client configuration files, some fields like sFTP passwords or encryption keys are encrypted. To encrypt such values, provide them as parameters to web service call.



```
Soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns
<soapenv:Header/>
<soapenv:Body>
<idx:encryptConfigurationString>
<!--Optional:-->

<argo>sFTP_passwordl</argo>
</idx:encryptConfigurationString>
</soapenv:Body>
</soapenv:Envelope>
```

The returned result is an encrypted string that could be used in configuration files.

### DecryptDataString

This method is similar to EncryptAndHashAcordFile, but it could be used when fist one ACORD XML tag should be encrypted.

String to encrypt must be passed as a parameter to web service call.

The returned result is an encrypted string.

## **EncryptWholeFile**

This method should be used to encrypt NAILBA 800 and NAILBA 900 files. Unlike ACORD XML files, NAILBA files are encrypted completely.

File should be placed at <IDXROOT>/encrypt folder.

File name must be provided as a parameter to web service call.



As a result – new file is created with completely encrypted content.

### **GenerateNewSecurityKey**

This method could be used to generate new RSA security key to use with Security API.

No parameters required.

As a result, a new RSA key is generated.

## **SUPPORT**

If you receive an error or need a question answered, please contact Oracle Insurance Data Exchange Support by sending an e-mail to <a href="mailto:oidxsupport\_grp@oracle.com">oidxsupport\_grp@oracle.com</a>.

#### Address any additional inquiries to:

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