Administrator Handbook for Brokers

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Document control

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1.0	14.11.2016	Initial version
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Distributor and Source

This documentation is primarily aimed at brokers or insurers, which are connected to BrokerGate or schedule a connection. Document holder and source of supply is IG B2B for Insurers + Brokers:

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Management Summary

IG B2B is a syndicate of insurance brokers, software companies and insurance companies of Switzerland and Liechtenstein. IG B2B develops standards for business processes, digital documents and data exchange for the core processes in the insurance broker market.

With BrokerGate® IG B2B offers a platform which provides a high secure single sign-on solution through which insurance brokers can access web portals of several insurance companies. With BrokerGate® DXP-Service, IG B2B offers a service for a secure and automated document exchange. Several insurance companies have already built interfaces to BrokerGate® DXP-Service and support a fully automated document exchange.

To further strengthen the automated document exchange processes IG B2B developed a cloud based solution (project name "Giraffe") which can be used by insurance brokers to access the BrokerGate® DXP-Service. In addition, the same software components can be used to be integrated in broker software solutions to make them BrokerGate® DXP-Service ready, resulting in a fully automated document exchange with the connected insurance companies.

This document describes the functionality of the Giraffe Admin Portal. It is a detailed step by step manual that guides you through all functions needed by a broker admin.

1. Introduction

1.1 Initial situation

IG B2B is a syndicate of insurance brokers, software companies and insurance companies of Switzerland and Liechtenstein. IG B2B develops standards for business processes, digital documents and data exchange for the core processes in the insurance broker market.

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1.2 Target

This document describes the functionality of the Giraffe Admin Portal. It is a detailed step by step manual that guides you through all functions needed by a broker admin.

1.3 Scope and Area of validity

The document contains all relevant information for a broker.

Many details to the adjacent systems (DXP, IDP, BrokerGate, etc.) and their interfaces are specified in different specifications (see section 1.4). Therefore, these details are not fully included in this document but referenced where needed.

1.4 Referenced Documents

Ref	Title	Version	Language
[1]	BrokerGate® System- und Anbindungsspezifikation	3.5	German
[2]	BrokerGate System- und Anbindungsspezifikation DXP-Service	1.2	German

Tab. 1: Referenced Documents

1.5 Terms and Abbreviations

Term	Description
DXP	Document Exchange Proxy (part of BrokerGate), see [2]
IDP	Identity Platform (part of BrokerGate), see [1]
SAML	Security Assertion Markup Language
SAML SP	SAML Service Provider
SSO	Single Sign-on (part of BrokerGate)
TEWS	TechUser Enrolment Web Service (part of BrokerGate), see [2]
UID	Company identification Number (UID), see http://www.bfs.admin.ch/bfs/portal/de/index/themen/00/05/blank/03/02.html
UPWS	User Provisioning Web Service (part of BrokerGate), see [1]
WAF	Web Application Firewall
XML	Extensible Markup Language
XSD	XML Schema Definition

Tab. 2: Terms and Abbreviations

2. General

2.1 Login to the Giraffe Admin Portal

Login to the Giraffe Admin Portal is only possible over IG B2B BrokerGate (https://brokergate.igb2b.ch).

After login on IG B2B BrokerGate click on the "Giraffe"-Button. This will redirect you to the Giraffe User Portal. If you are logged in as an Administrator, you will find a link on the top right corner of the Giraffe User Portal to the Giraffe Admin Portal.

If you do not see the "Giraffe"-Button please contact IG B2B.

2.2 Data refresh

Each "Save"- or "Delete"-Action triggers an automatic data reload. Therefore, a manual reload is not necessary. If you nevertheless want to update the page, click on the corresponding page navigation on the left.
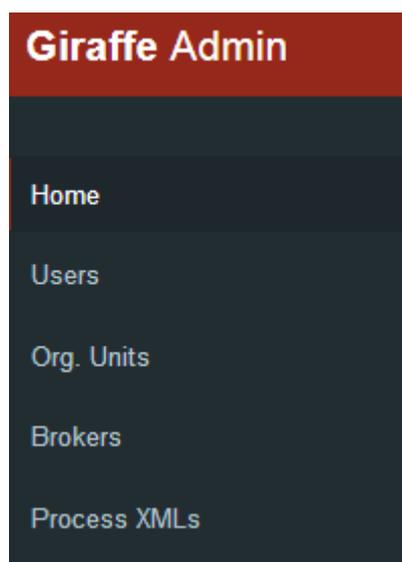
2.3 Detail-Views

A detail popup dialog exists on each view to see more information about a record.

Go to a view (e.g. Users) and click on the "Details"-Button in the last table column.

This opens a popup with some detail information.
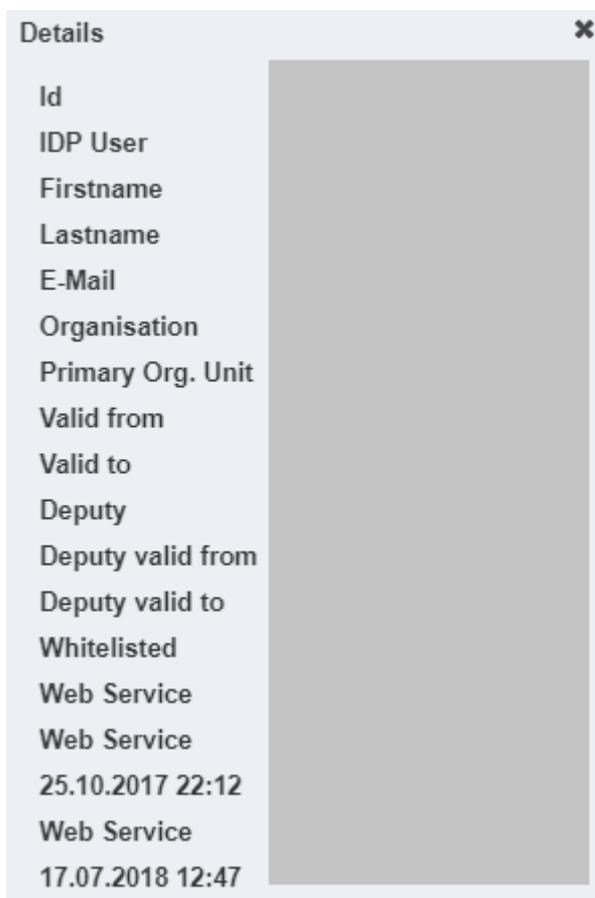
3. Users

3.1 Set the Language

The Giraffe Admin Portal is available in English, German, French and Italian.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

2. Go to the view Users.
3. Click on the Edit-Button .
4. Select the language from the drop down menu
5. Click .
6. Logout from Giraffe Admin Portal.
7. Re-login to the Giraffe Admin Portal over IG B2B BrokerGate.
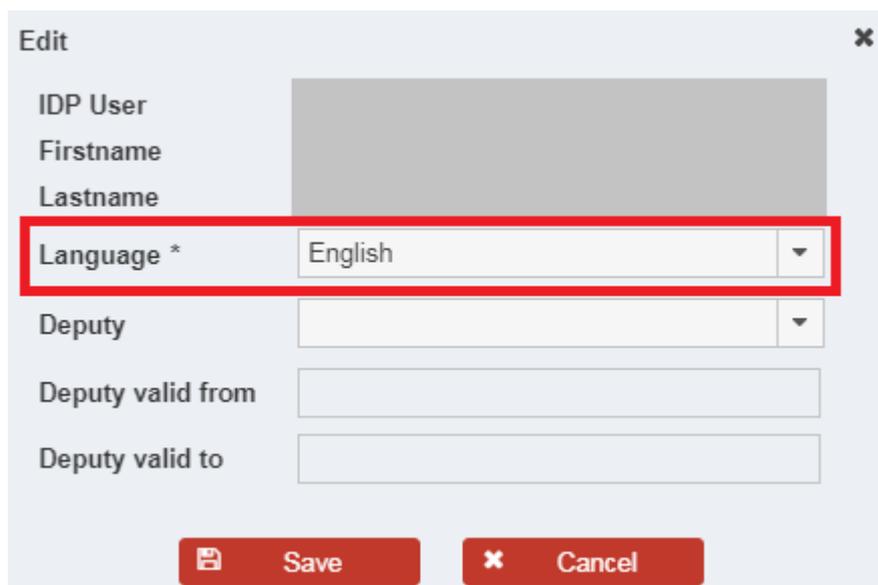
Important note: The language switch takes only effect after a new login.
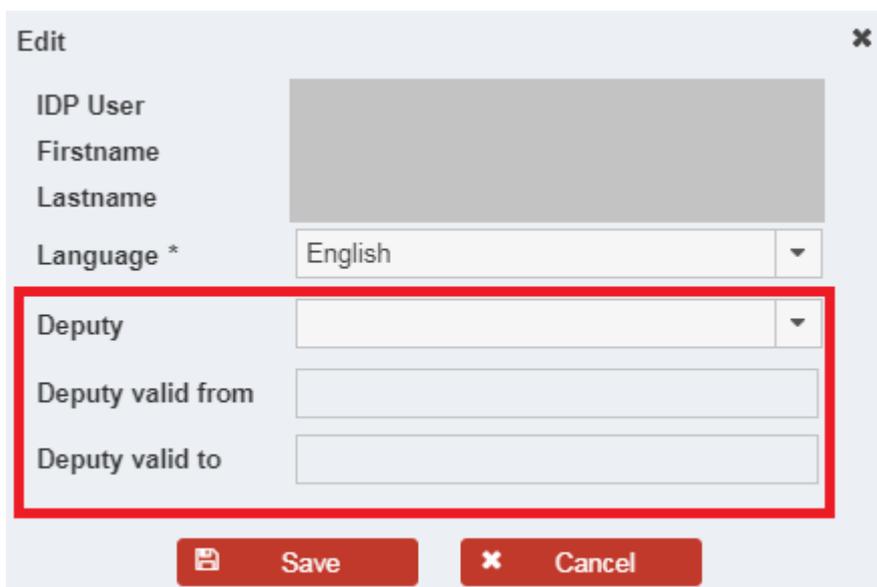
3.2 Define a Deputy

You can define a deputy who has the possibility to work with your point of view.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

2. Go to the view Users.
3. Click on the Edit-Button.
4. Select a deputy from the drop down menu.
5. Additionally, you can define the time range when the deputy is valid.
6. Click Save.

After the next login, your deputy will found a deputy selection on the top right corner.

Important note: The deputy function takes only effect after a new login.

Validity:

If the "Deputy valid from" and "Deputy valid to" is empty. The defined deputy is always valid.

If the "Deputy valid from" is set the deputy is valid from the beginning of this time.

If the "Deputy valid to" is set the deputy is valid till the end of this time.
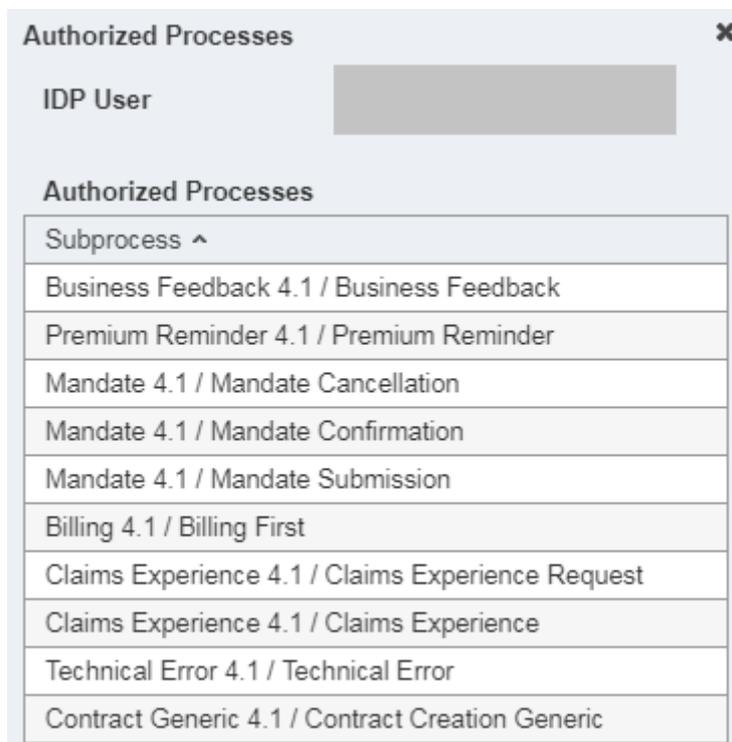
3.3 Show the authorized processes

IG B2B BrokerGate provides the processes for which the user is authorized. These processes cannot be modified in Giraffe. This is only possible over IG B2B BrokerGate.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

2. Go to the view Users.

3. Click on the "Authorized Processes"-Button.

Authorized Processes	
IDP User	
Authorized Processes	
Subprocess ▲	
Business Feedback 4.1 / Business Feedback	
Premium Reminder 4.1 / Premium Reminder	
Mandate 4.1 / Mandate Cancellation	
Mandate 4.1 / Mandate Confirmation	
Mandate 4.1 / Mandate Submission	
Billing 4.1 / Billing First	
Claims Experience 4.1 / Claims Experience Request	
Claims Experience 4.1 / Claims Experience	
Technical Error 4.1 / Technical Error	
Contract Generic 4.1 / Contract Creation Generic	

4. Organisation Units (Org. Units)

4.1 View

All data of the Organisation Units are provided by IG B2B BrokerGate and cannot be modified in Giraffe. This is only possible over IG B2B BrokerGate.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

2. Go to the view Org. Units.

IDP Id ⌃	Name ⌃	Register No. ⌃	Type ⌃	Organisation ⌃	
100495	IG-Testbroker	CHE-IAT-90000	headquarter	IG-Testbroker	i

(1 of 1)

5. Broker

5.1 Update Broker data

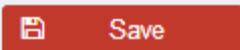You can modify the data of a broker with the following steps.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

   DE ▼   ⬈   ➡

2. Go to the view Brokers.
3. Click on the Edit-Button 📝 .
4. Modify the data.
5. Click 💾 Save .

| Edit		✖
IDP Org Id	1203	
Register No.	CHE-IAT-90000	
Name *	IG-Testbroker	
Street Number	Stauffacherstrasse 28	
City	Zürich	
Zip Code	8004	
Swiss Canton	ZH	
Country Code	CH	
E-Mail	info@igb2b.ch	
Url	www.igb2b.ch	
Language *	German ▼	
DXP valid from	01.02.2018 00:00	

💾 Save   ✖ Cancel

5.2 Create a Technical User

For the DXP-Service a technical user is required. Otherwise the DXP-Service cannot be used.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

2. Go to the view Brokers.
3. Click on the "Tech User Enrollment"-Button. (Registration as technical user)
4. Insert the required data of the technical user.
5. Click
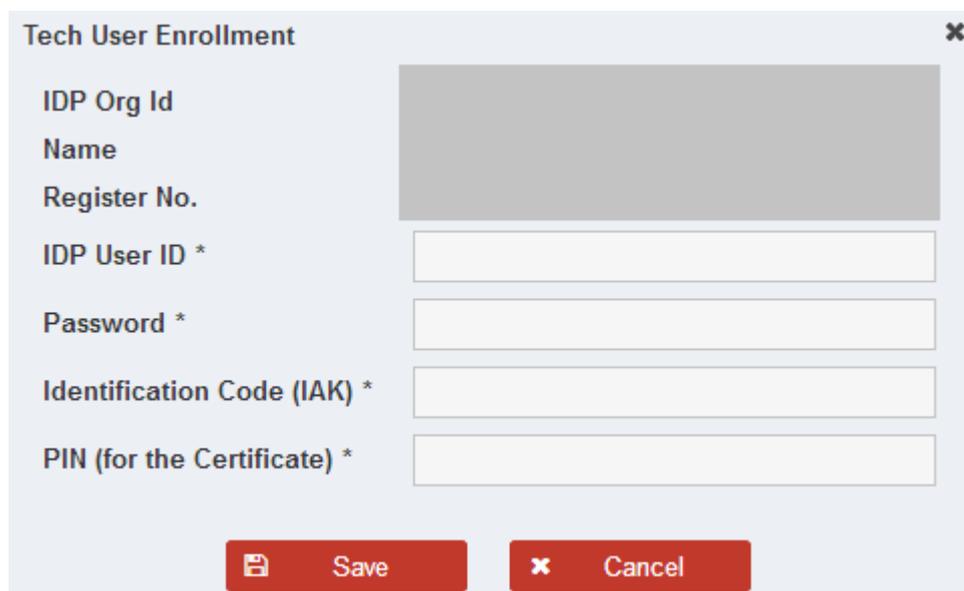
Important note:

The data for the technical user is provided by IG B2B BrokerGate. The technical user stored in Giraffe must be updated each time you create a new technical user on IG B2B BrokerGate for this broker.
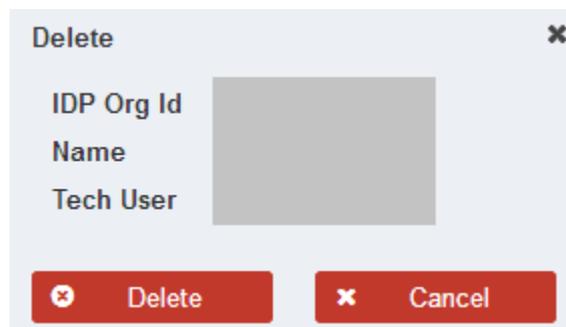
5.3 Delete the Technical User

Follow the steps below to delete an existing technical User in Giraffe.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

2. Go to the view Brokers.
3. Click on the "Delete Tech User"-Button.
4. Click

6. Process XMLs

The "Process XMLs"-Page shows all XMLs that are created over the Giraffe User Portal or who are received over the DXP service.

This files can be viewed on the Giraffe User Portal in the Inbox/Outbox and edited if necessary.

6.1 Detailed informations to each process XML

Detailed informations will be shown by clicking on [i]. Two flags [✓] are important for files which were put or downloaded by Brokers over the DXP Service. They can be viewed by opening the detail information.

Insurer Service: The XML file was put to Giraffe over the DXP Service and not created in Giraffe.

Acknowledged: The broker downloaded and acknowledged the file with the DXP Service (DXP GUI on BrokerGate).
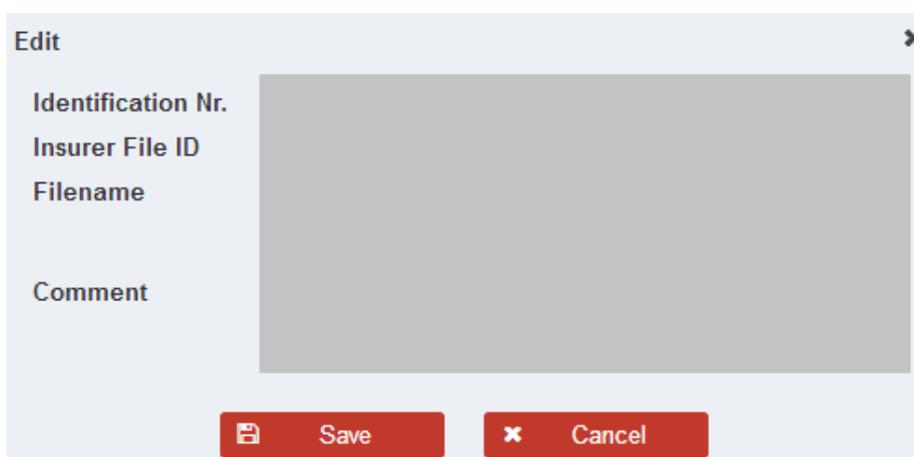
6.2 Add a comment to each Process XMLs

You can add a comment to each Process XML with the following steps.

1. Login to the Giraffe Admin Portal over IG B2B BrokerGate.

2. Go to the view Process XMLs.
3. Click on the Edit-Button. [✎]
4. Add or modify the comment.
5. Click [💾 Save]

6.3 Process XML Types

Type	Is Inbox	For Insurer
Request from Broker	☐	☐
Response for Broker	✔	☐
Request from Insurer	☐	✔
Response for Insurer	✔	✔