Administrator Handbook for Insurers

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Document control

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Distributor and Source

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

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Management Summary

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

1. Introduction

1.1 Initial situation

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

With BrokerGate® the 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, the 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 the 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.

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 an insurer admin.

1.3 Scope and Area of validity

The document contains all relevant information for an insurer.

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	Unternehmens-Identifikationsnummer (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 the IG B2B BrokerGate (https://brokergate.igb2b.ch).

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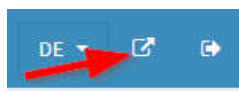
If you do not see the "Giraffe"-Button please contact the IG B2B.

2.2 Data refresh

Each "Save"-, "Update"- 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.
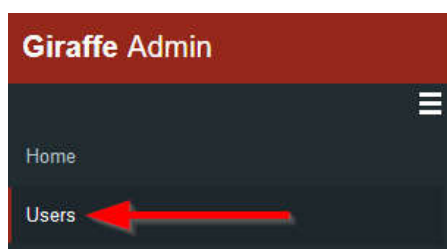
2.3 Detail-Views

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 [i] in the last table column.

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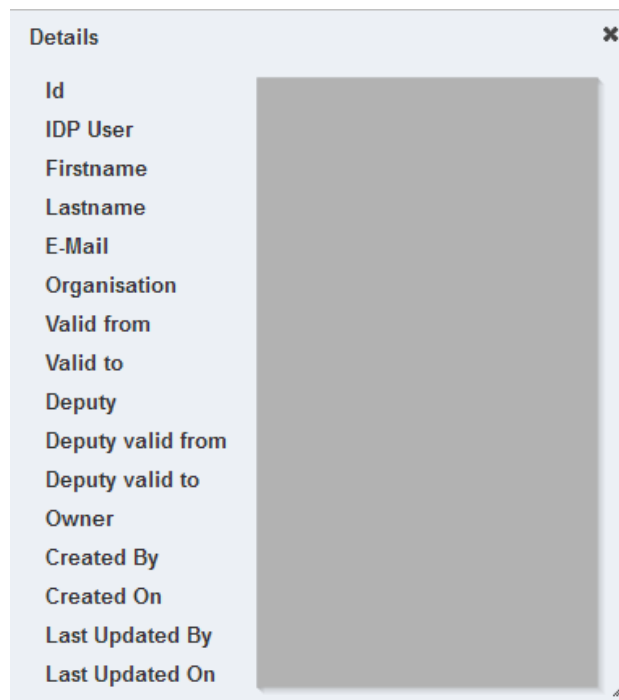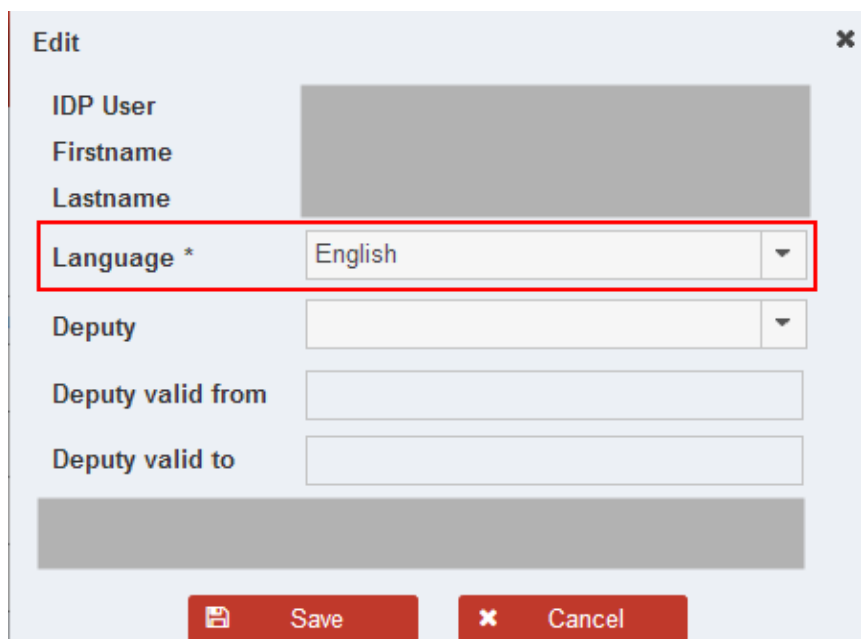
3. User

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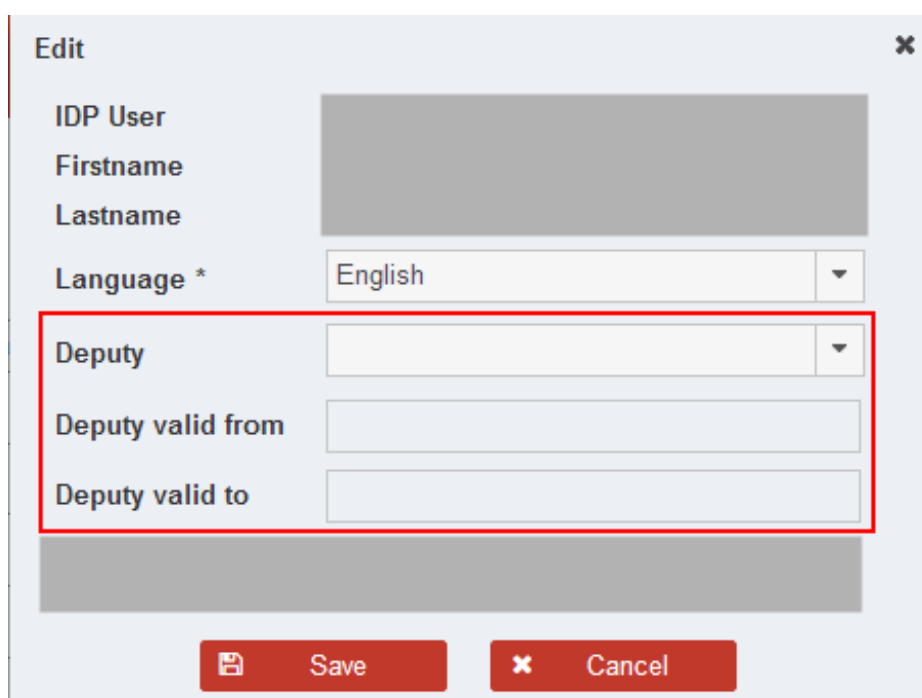
Important note: The language switch takes only effect after a re-login.

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 the IG B2B BrokerGate.
2. Go to the view Users.
3. Click on the Edit-Button 📝 .
4. Select a deputy from the drop down.
5. Additionally, you can define the time range when the deputy is valid.
6. Click Save 💾 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.

4. Insurer

4.1 Update Insurer data

You can modify the data of an insurer with the following steps.

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Insurers.
3. Click on the Edit-Button .
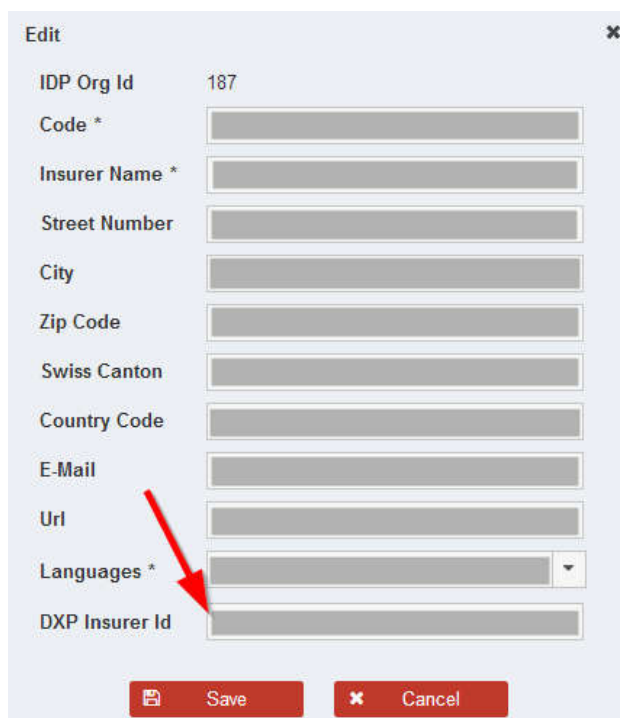4. Modify the data.
5. Click Save .

4.1.1 Technical E-Mail

In case of invalid DXP-XML requests or responses from the insurer, Giraffe sends an error e-mail to the "Technical E-Mail" address. If no "Technical E-Mail" is defined an e-mail to the address defined in the field "E-Mail" is sent.

4.2 Enable the DXP Service

The DXP Insurer ID has to be set for all insurers which either support the DXP Service (to send files from Giraffe to the insurer instead of sending mails) or to receive files from Brokers over the DXP Broker Service (if the insurer does not implement the DXP Insurer Service).

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Insurer.
3. Click on the Edit-Button [icon] .
4. Set the "DXP Insurer Id"
5. Click Save [Save icon] .
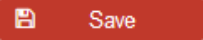
Important note:
The "DXP Insurer Id" is provided by the IG B2B BrokerGate.

4.3 Modify the supported Processes

A broker can send a process request from Giraffe via DXP-Service only if the insurer has this process activated in the supported processes.

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Insurer.
3. Click on the "Update Coreprocesses"-Button .
4. Select or deselect the coreprocesses from the "Available Coreprocesses"-List
5. Click Save .
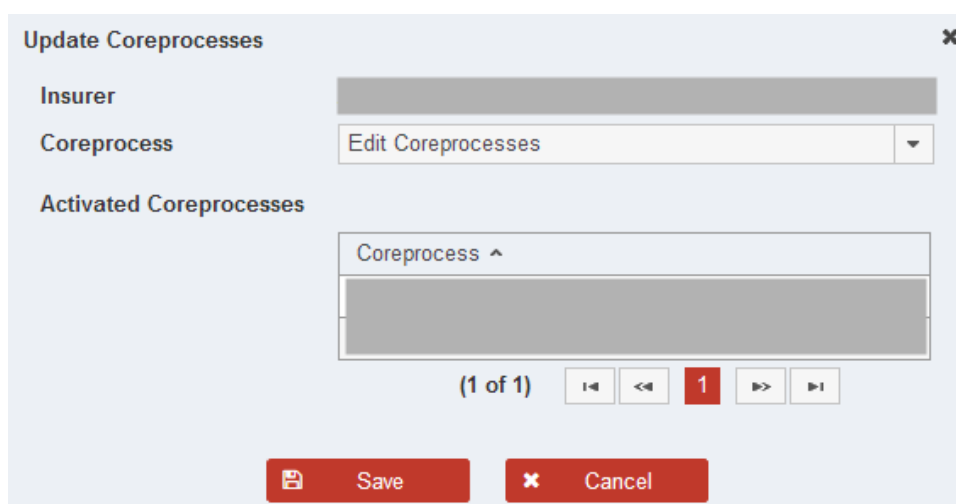
Note: You can see all current activated Processes in the table "Activated Coreprocesses".

5. Insurer E-Mails

It is possible to configure an e-mail address for each broker, process or content that is used to send the notification e-mails from Giraffe when a new request is available.

The e-mail address with the best fit to the request is taken.

Examples:

Configured E-Mails:

Broker	Process	Content	E-Mail
Test Broker	*	*	info@insurer.com
Test Broker	Offer Generic	*	offer@insurer.com
Test Broker	Offer Generic	Single Life	single.life@insurer.com
*	Offer Generic	Single Life	all.single.life@insurer.com

Tab. 3: Insurer E-Mails

Request	E-Mail taken
Single Life generic offer from «Test Broker»	single.life@insurer.com
Non Life generic offer from «Test Broker»	offer@insurer.com
Premium Reminder from «Test Broker»	info@insurer.com
Single Life generic offer from «Broker 2»	all.single.life@insurer.com
Premium Reminder from «Broker 2»	General E-Mail configured in the Insurers view.

Tab. 4: Insurer E-Mails examples

5.1 Add Insurer E-Mail

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Insurer E-Mails.
3. Click on New **＋ New** .
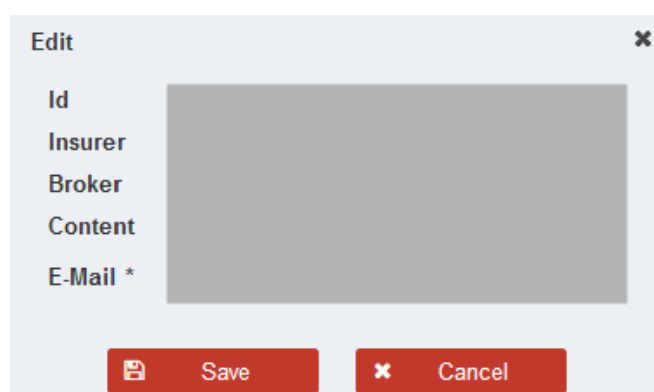4. Enter the required data.
5. Click Save **🖫 Save** .

5.2 Update Insurer E-Mail data

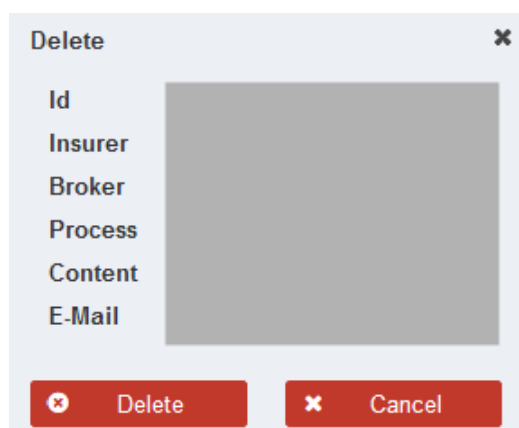You can modify the data of an insurer e-mail with the following steps.

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Insurer E-Mails.
3. Click on the Edit-Button .
4. Modify the data.
5. Click Save .

5.3 Delete Insurer E-Mail data

Follow the steps below to delete an existing Insurer E-Mail in Giraffe.

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Insurer E-Mails.
3. Click on the "Delete"-Button .
4. Click Delete .

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.

These files can be viewed on the Giraffe User Portal in the Inbox/Outbox.

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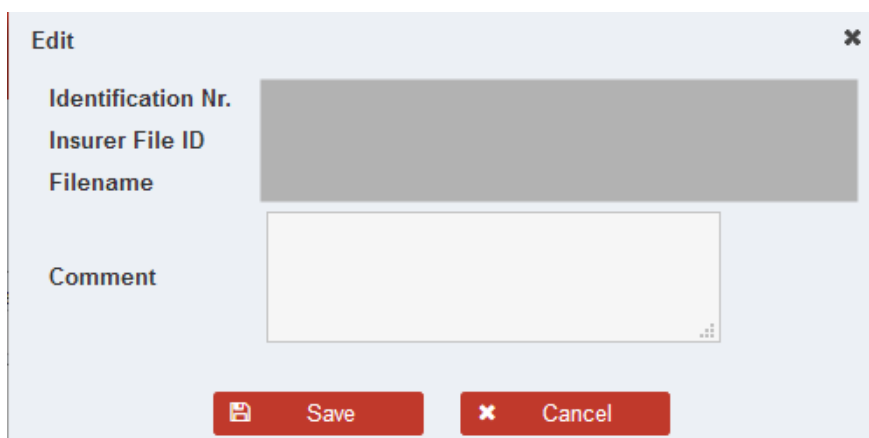
Insurer Service: The file was put to Giraffe over the DXP Service and not created in Giraffe.

Acknowledged: The broker downloaded and acknowledged the file with the DXP Service.

6.1 Add a comment to the Process XMLs

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

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Process XMLs.
3. Click on the Edit-Button ✏️ .
4. Modify the data.
5. Click Save 💾 **Save** .

6.2 Process XML Types

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