



Administrator Handbook for Brokers

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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 a broker 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 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	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>).

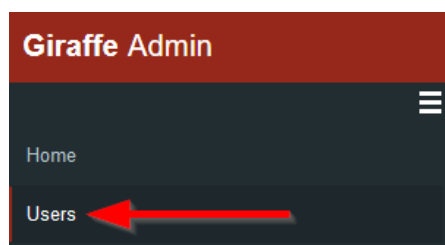
After login on the IG B2B BrokerGate click on the "Giraffe"-Button. This will redirect you to the Giraffe User Portal. If you are logged in as an Administrator, you will find a link on the top right corner of the Giraffe User Portal to the Giraffe Admin Portal.



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.

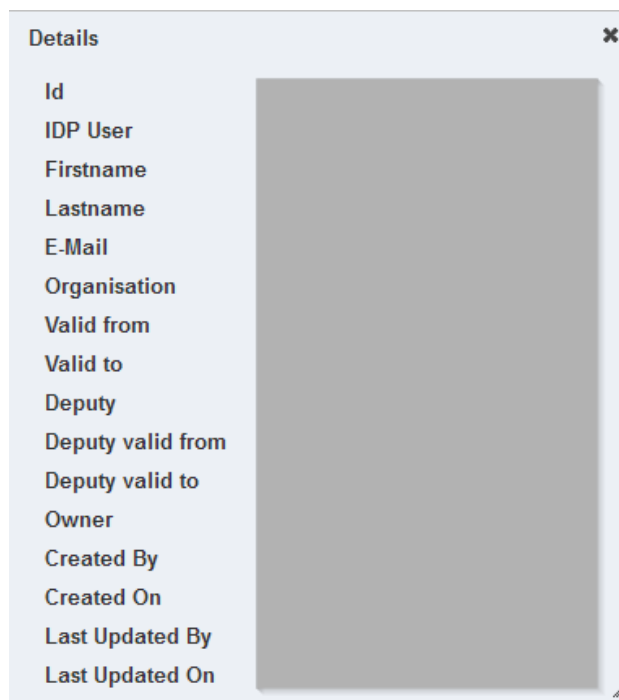


2.3 Detail-Views

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  in the last table column.



This opens a popup with some detail information.

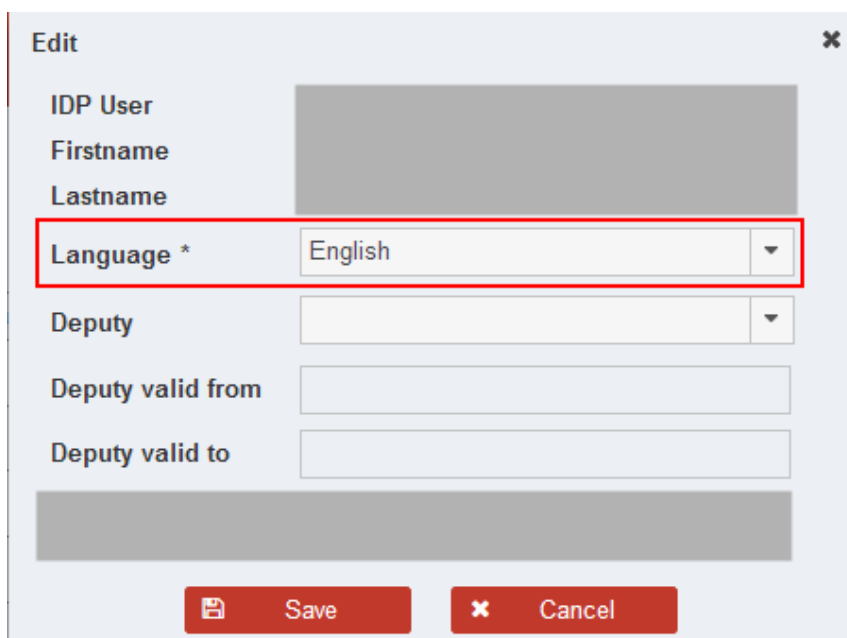


3. User

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.



The screenshot shows a modal window titled "Edit" with a close button (X) in the top right corner. The form contains the following fields:



- IDP User: A greyed-out text input field.
- Firstname: A greyed-out text input field.
- Lastname: A greyed-out text input field.
- Language *: A dropdown menu with "English" selected, highlighted by a red border.
- Deputy: A dropdown menu.
- Deputy valid from: A text input field.
- Deputy valid to: A text input field.

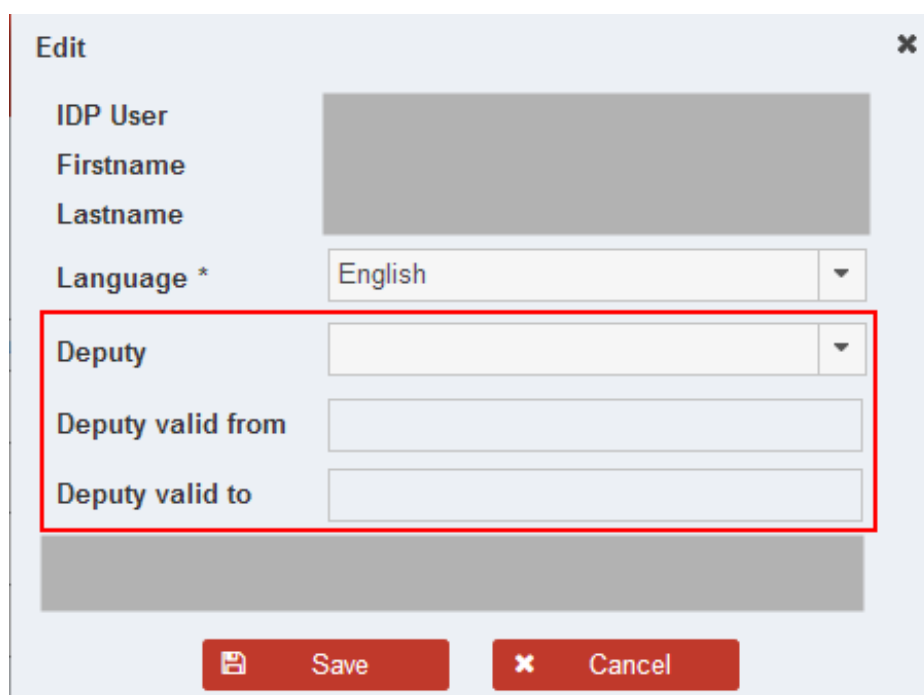
At the bottom of the form are two buttons: "Save" (with a save icon) and "Cancel" (with an X icon).

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.

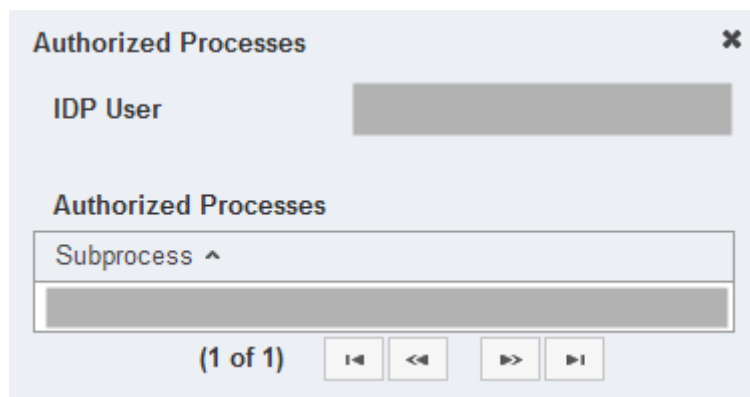
If the "Deputy valid from" is set the deputy is valid from the beginning of this time.

If the "Deputy valid to" is set the deputy is valid till the end of this time.

3.3 Show the authorized processes

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

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Users.
3. Click on the "Authorized Processes"-Button .



4. Organisation Units

4.1 View



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

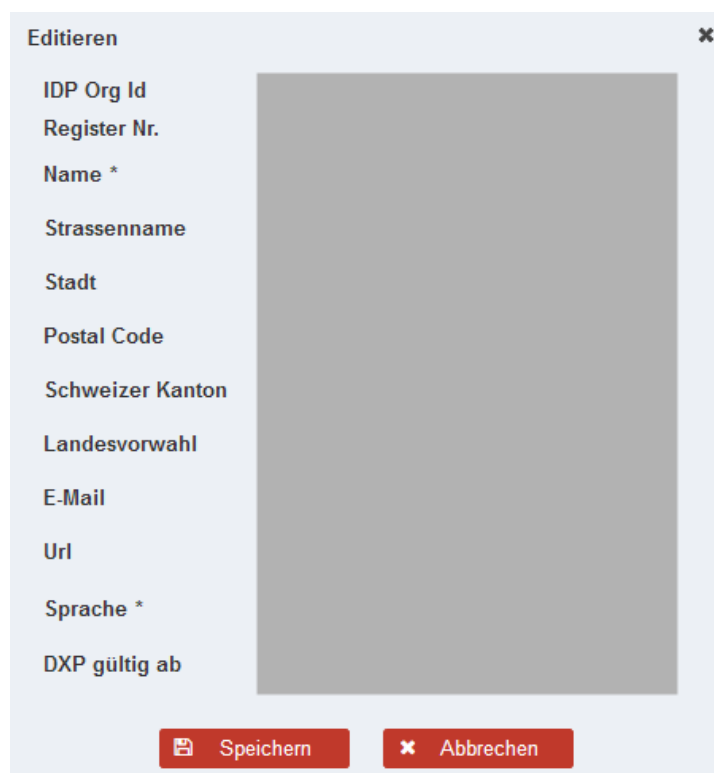
1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Org. Units.

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 the IG B2B BrokerGate.
2. Go to the view Brokers.
3. Click on the Edit-Button .
4. Modify the data.
5. Click Save  Save.



5.2 Create the Technical User

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

1. Login to the Giraffe Admin Portal over the IG B2B BrokerGate.
2. Go to the view Brokers.
3. Click on the "Tech User Enrollment"-Button .
4. Insert the required data of the tech user.
5. Click Save  Save.



The screenshot shows a form titled "Tech User Enrollment" with a close button (X) in the top right corner. The form contains the following fields:

- IDP Org Id
- Name
- Register Nr.
- Technischer Benutzer IDP Benutzer-ID *
- Ihr persönliches Passwort *
- Erkennungscode (IAK) *
- PIN (für das Zertifikat) *



At the bottom of the form, there are two buttons: "Speichern" (Save) and "Abbrechen" (Cancel).

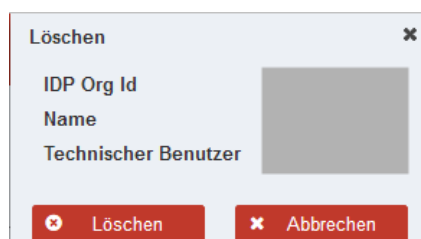
Important note:

The data for the tech user is provided by the IG B2B BrokerGate. The tech user stored in Giraffe must be updated each time you create a new tech user on the 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 the IG B2B BrokerGate.
2. Go to the view Brokers.
3. Click on the "Delete Tech User"-Button .
4. Click Delete  Delete.



The screenshot shows a form titled "Löschen" (Delete) with a close button (X) in the top right corner. The form contains the following fields:

- IDP Org Id
- Name
- Technischer Benutzer

At the bottom of the form, there are two buttons: "Löschen" (Delete) and "Abbrechen" (Cancel).



6. Process XMLs

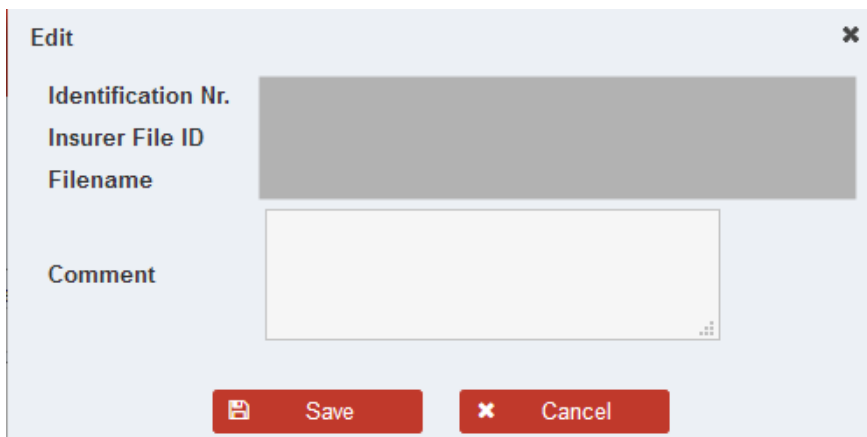
The "Process XMLs"-Page shows all XMLs that are created over the Giraffe User Portal or who are received over the DXP service.

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

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	<input type="checkbox"/>	<input type="checkbox"/>
Response for Broker	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Request from Insurer	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Response for Insurer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>