



POLARIS U.K. LIMITED

Kewill EDI Integration Overview

Version: 1.0

Status: Definitive

Revised Date: 8 August 2006

The contents of this document apply to ProductWriter RTE integrators wishing to integrate the Kewill eBiz-Manager into an intermediary application

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1. Introduction

1.1 Purpose

This document provides an overview of the implementation process for the RTE to Kewill integration supported by Polaris.

1.2 Scope

The overall structure and approach to integration is presented to pull together the components of the integration from the perspective of the Polaris deliverables. Detailed specifics such as the EDI mappings themselves are specified in other documents identified in the body of this document.

No specifics of the Kewill eBiz-Manager, its usual implementation approaches or its internals are identified here. These areas are covered separately by Kewill consultancy and documentation.

1.3 Summary

Polaris has a licence for the use of the Kewill eBiz-Manager for integration with the RTE into intermediary applications - note that insurer applications are not included. Polaris also maintains a number of standard Kewill EDI mappings to translate between the Polaris dictionaries and certain outbound and inbound EDI messages commonly used by intermediaries.

The ProductWriter RTE supports an intermediate format compatible with the Kewill EDI mappings which is used to provide a data transfer format between the RTE and Kewill eBiz-Manager. The eBiz-Manager provides the capabilities necessary to execute the mappings and effect the communication of the EDI messages between the intermediary and the insurers.

1.4 Amendment History

Version	Date	Narrative
1.0	12 July, 2001	First definitive version

1.5 References

The following documentation is referred to in the document. It is available for download from the Polaris Web Site (licensee logon area).

1. EDI - Intermediate File Specification
2. XML Interface – XML RTE System Developers Guide
3. Standard Interface – RTE System Developers Guide (NB not for XML interface)
4. ProductWriter RTE – RTE API Reference (NB not for XML interface)
5. EDI mapping specifications for each of the supported EDI messages (dictionary version specific).

2. EDI Integration Scope

2.1 Supported Messages

Polaris provide mappings for intermediaries for the Kewill eBiz-Manager for a number of the more commonly used EDI messages, which are:

Message	Description	Mapping Support
PROP05.2	Motor proposal message	Mapping from the dictionary to the EDI message for the UK Private Motor dictionary.
PLSA05.2	Motor policy status adjustment	Mapping from the dictionary to the EDI message for the UK Private Motor dictionary.
MTAD05.2	Motor MTA message	Mapping from the dictionary to the EDI message for the UK Private Motor dictionary.
RCON05	Motor renewal Confirmation message	Mapping from the dictionary to the EDI message for the UK Private Motor dictionary. (uses PROP05 mapping)
RNWL05.1	Motor renewal message	Mapping from the EDI message to the dictionary (inbound mapping) for the UK Private Motor dictionary.
IPROP05	Irish Motor proposal message	Mapping from the dictionary to the EDI message for the Irish Private Motor dictionary.
IMTAD05	Irish Motor MTA message	Mapping from the dictionary to the EDI message for the Irish Private Motor dictionary.
HHPR03.6	Household proposal message	Mapping from the dictionary to the EDI message for the UK Household dictionary.
IPPOAD	Commercial EDI message	Mapping from the dictionary to the EDI message for the UK Commercial dictionary. The mapping from the EDI message to the dictionary has been developed but is not currently being maintained pending demand from the market.

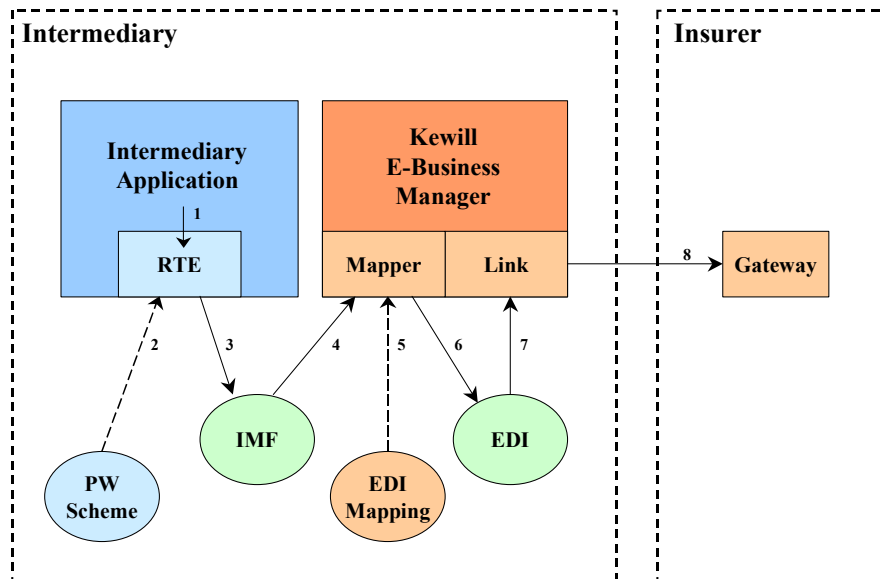
2.2 Integration Components

Making use of the mappings involves the integration of the host application, RTE, message mappings and Kewill eBiz-Manager. The integration process requires the correct coordination of a number of resources to achieve a working result. The resources are:

1. ProductWriter scheme with the required EDI messages selected
2. Integration between the RTE and the intermediary application to ensure that the data needed for the EDI messages is presented correctly
3. Kewill eBiz-Manager installation including network connection
4. Message mappings from Polaris
5. Configuration of eBiz-Manager to define the handling and communications of messages for each of the intended insurer recipients (trading relationships).
6. Integration between the intermediary application and eBiz-Manager to handle EDI logs, audit trails and management information.

2.3 Integration Structure

The diagram below shows the components needed to achieve an integration and data flows involved in message production and transmission. Receipt of messages is much the same in reverse, the main exception being that the Intermediary Application must parse a directory to identify the presence of Intermediate Files resulting from the EDI messages.



The steps in the generation and transmission of a message are:

1. The application loads the data for the transaction into the RTE, this will be the risk data and results for a previously executed quote plus any additional data required for the message.
2. The scheme is interrogated for the EDI message selection for the RTE transaction being executed.
3. The RTE writes the data out into an Intermediate File. The name and location of the file are specified by the transaction. The location must be the correct directory associated with the mapping for the EDI message.
4. The Automated Service component of eBiz-Manager identifies the presence of the file by polling the configured delivery directories associated with the EDI mappings.
5. The eBiz-Manager Mapper component runs the EDI Mapping provided by Polaris.
6. The resultant EDI message is stored.
7. When delivery of the message is scheduled, the eBiz-Manager Link component picks up the message and prepares it for transmission, including any batching required.
8. eBiz-Manager Link transmits the message by the method configured for the trading partner.

3. Pre-Requisites

Achieving a working integration is not a trivial process and a good understanding of the data and messages is required for its delivery, maintenance and support. A good working knowledge is required of the following areas:

1. Data usage in the integration between the local (broker or intermediary) application and the RTE and the data which schemes are expected to output, so that changes necessary to make required EDI data available can be identified, specified and delivered
2. EDI message mapping specification provided by Polaris to understand the data translation from the dictionary data so that errors arising during development and implementation can be tracked down
3. Specification of the EDI message formats and an understanding of what data they should contain to ensure that all of the necessary data is made available to the mapping via the RTE
4. Technical details of the EDI message requirements for each of the intended insurer recipients including addresses, batching requirements, etc., so that they can be configured into eBiz-Manager.

If these areas are not well understood considerable time can be lost due to misunderstandings and difficulties in tracking down problems that can require the combined efforts of the integrator, scheme builder, Polaris and the insurer's EDI staff.

For example, an insurer may query a missing data item in an EDI message by reference to a record type and element name. The integrator must understand what this means and determine where this data is supposed to be mapped from in the mapping supplied by Polaris. There are then three possibilities:

1. Polaris mapping does not map the data in the manner expected by the insurer – integrator needs to identify which is correct by consultation with Polaris and the insurer
2. The data should be populated via the RTE integration with the integrator's application – integrator needs to work out where it is to come from and make the necessary change
3. The data should be populated by the insurer's ProductWriter scheme – integrator needs to refer the issue to the insurer's ProductWriter scheme writer.

4. Planning an EDI Integration

The steps identified below need to be accomplished to achieve a working Kewill EDI integration. They should all be considered in detail to put together a plan for the work. This will involve considerable liaison and external dependencies so careful planning is necessary to achieve a result without incurring delays.

1. Review the pre-requisites and ensure that the necessary knowledge is acquired. Depending on the experience available and the maturity of contacts with insurers this may take some time. Failure to achieve this will result in delays later when problems are encountered and action has to be taken to track down the problem, source the data necessary to effect a fix and implement a fix which may require changes to insurer schemes or the interface between the intermediary application and the RTE.
2. Contact must be established with Kewill early on to discuss implementation requirements, delivery, installation and support of eBiz-Manager. The licence fee is included in the Polaris RTE licence for intermediaries (not for insurers), but there are additional costs for the initial consultancy required to install and achieve a working communication environment (usually less than 5 days depending on complexity and the availability of requirements) and support via the Kewill service desk.
3. Adjust the RTE integration as necessary to ensure that the data required for the EDI messages is available for mapping (this can be done by requesting an ALL data response from the XML RTE and checking that the resultant message contains all of the data needed). It is possible that some insurer scheme changes may be necessary to include appropriate EDI Selections.
4. Once the installation of eBiz-Manager is complete mapping execution can be tested in conjunction with the RTE and local application.
5. Once insurers are ready to receive test messages the handling and communication configuration for the trading relationship in the eBiz-Manager database can be tested.

5. Deliverables

5.1 Polaris Deliverables

The deliverables provided by Polaris are identified below. These are all available for licensees to download from the Polaris web-site.

1. Specification of the RTE interface facilities used to import and export intermediate files (RTE system developers guides and API reference).
2. Specification of the RTE intermediate file.
3. Specification of the data mapping between the RTE intermediate file and each supported EDI message.
4. Configuration of each mapping to run within eBiz-Manager.
5. Initial set-up for each mapping with instructions for the changes required to the eBiz-Manager environment (new UDRs, updates to xhook.prm, etc).
6. Installation routines to update mappings in line with changes to the mapping specification (mostly necessitated by changes to the Polaris dictionary).
7. Service desk support for the above.

5.2 Kewill Deliverables

The deliverables provided by Kewill are identified below. Contact must be established directly with Kewill to set up a licence and arrange for these to be provided.

1. Kewill eBiz-Manager software – licence included with RTE for intermediaries.
2. Installation of eBiz-Manager, and an initial set of Polaris mappings - additional fee.
3. Initial consultancy, for an additional fee, to:
 - set up the eBiz-Manager environment
 - establish external communications
 - provide familiarisation about use of eBiz-Manager to enable the integrator to understand how to set up trading relationships
 - provide support to enable integrators to identify and handle errors in mapping execution and message handling/communication, including the means of achieving this via an integration with the local application.
4. Service desk support for the above – support contract required.

5.3 Support

The breakdown of deliverables above should enable an integrator to identify which support requests to direct to Polaris and which to Kewill. If there is any doubt, the most likely service desk should be consulted to help identify the root elements of the problem so that the appropriate service desk can address them. Where necessary the service desks will confer to resolve matters that straddle the lines of responsibility.