Insurer's Market Repository (IMR) & Electronic Claims File (ECF & ECF2)

Desktop Software Compatibility Guide

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INTRODUCTION

This document outlines technical prerequisites for the successful use of the Insurers' Market Repository (IMR) for Accounting and Settlement (A&S) and Electronic Claims File (ECF and ECF2) services. It contains details on versions of third-party supporting software such as the Java Runtime Environments (JREs) and Internet browsers necessary for using these services.

This guide is intended to be read by a technical audience to enable organisations to make optimal use of the IMR and ECF2 components and outlines:

- Supported Internet browsers and browser versions

- Supported JRE versions

- Solutions to common client side configuration problems, notably with Java Applets and Proxy Servers

- Prerequisites for specific ECF2 Services:

    o ECF2 Homepage & Single Sign-On (SSO)

    o Document File Viewer (DFV)

    o Claims Workflow Services (CWS)

    o Claims Agreement Screens (CAS)

    o Claims Data Warehouse (CDW)

(Please note that there are no specific requirements for Claims Workflow Triggers (CWT))

Section 1. Insurers' Market Repository (IMR)

1.1 Browser and JRE Compatibility

Users' workstations must be set up with a supported Internet browser and JRE combination. When reporting a fault to the Xchanging Service Centre, users will be asked to confirm their desktop browser version (users will be guided on how to do this). Whilst Xchanging will endeavour to provide the necessary support, Xchanging reserve the right to ask users to recreate the error using a supported browser version.

1.2 Applets and Proxy Servers

When using a JRE signed Java Applets are installed by the IMR application on the users' workstations for the transferring of documents. These applets are incompatible with some JREs as shown in Tables 1 & 2 below. These configurations also take into account the use of a proxy server to access the Internet.

1.3 Supported Browsers and JREs

Xchanging offers support for the Microsoft Internet Explorer browser and Sun JRE for the use of the IMR and ECF2 components.

The tables below show the combinations of browsers and JREs supported with or without a proxy server. For convenience, combinations that are not supported are shown as well, but this list may not be comprehensive. For the avoidance of doubt no browser and JRE combination will be supported unless they are shown as ' ✔ Supported' in the tables below. Please note that earlier and later versions of the JRE are not currently supported and that automatic updates should be switched off on all workstations where you would like to keep a specific JRE.

Table 1 - JRE compatibility with IE 6

Sun Java Runtime Environment (JRE)	Internet Connection with no Proxy Server	Internet Connection with Proxy Server
1.5.0	X Not Supported	X Not Supported
1.5.0_01	X Not Supported	X Not Supported
1.5.0_02	✓ Supported	✓ Supported
1.5.0_03	✓ Supported	✓ Supported
1.5.0_04	✓ Supported	✓ Supported
1.5.0_05	✓ Supported	✓ Supported
1.5.0_06	✓ Supported	✓ Supported
1.5.0_07	✓ Supported	✓ Supported
1.5.0_08	X Not Supported	X Not Supported
1.5.0_09	X Not Supported	X Not Supported
1.5.0_10	X Not Supported	X Not Supported
1.5.0_11	✓ Supported	✓ Supported
1.5.0_12	✓	✓

	Supported	Supported
1.5.0_13	✔ Supported	✔ Supported
1.5.0_14	✔ Supported	✔ Supported
1.5.0_15	✔ Supported	✔ Supported
1.5.0_16	✔ Supported	✔ Supported
1.5.0_17	✔ Supported	✔ Supported
1.6.0	✔ Supported	✔ Supported
6u1	✔ Supported	✔ Supported
6u2	✔ Supported	✔ Supported
6u3	✔ Supported	✔ Supported
6u4	✔ Supported	✔ Supported
6u5	✔ Supported	✔ Supported
6u7	✔ Supported	✔ Supported
6u10	✘ Not Supported	✘ Not Supported
6u11	✔ Supported	✔ Supported
6u12	✔ Supported	✔ Supported

6u13	✔ Supported	✔ Supported

Table 2 - JRE compatibility with IE 7

Sun Java Runtime Environment (JRE)	Internet Connection with no Proxy Server	Internet Connection with Proxy Server
1.5.0	✗ Not Supported	✗ Not Supported
1.5.0_01	✗ Not Supported	✗ Not Supported
1.5.0_02	✔ Supported	✔ Supported
1.5.0_03	✔ Supported	✔ Supported
1.5.0_04	✔ Supported	✔ Supported
1.5.0_05	✔ Supported	✔ Supported
1.5.0_06	✔ Supported	✔ Supported
1.5.0_07	✔ Supported	✔ Supported
1.5.0_08	✔ Supported	✔ Supported
1.5.0_09	✔ Supported	✔ Supported
1.5.0_10	✔ Supported	✔ Supported
1.5.0_11	✔	✔

	Supported	Supported
1.5.0_12	✔ Supported	✔ Supported
1.5.0_13	✔ Supported	✔ Supported
1.5.0_14	✔ Supported	✔ Supported
1.5.0_15	✔ Supported	✔ Supported
1.5.0_16	✔ Supported	✔ Supported
1.5.0_17	✔ Supported	✔ Supported
1.6.0	✔ Supported	✔ Supported
6u1	✔ Supported	✔ Supported
6u2	✔ Supported	✔ Supported
6u3	✔ Supported	✔ Supported
6u4	✔ Supported	✔ Supported
6u5	✔ Supported	✔ Supported
6u7	✔ Supported	✔ Supported
6u10	✔ Supported	✔ Supported
6u11	✔ Supported	✔ Supported

6u12	✓ Supported	✓ Supported
6u13	✓ Supported	✓ Supported

Table 3 - JRE compatibility with IE 8

Sun Java Runtime Environment (JRE)	Internet Connection with no Proxy Server	Internet Connection with Proxy Server
6u23	✓ Supported	✓ Supported

1.4   Known Issues with Internet Explorer 8

When downloading or checking out documents in IE8 users may experience an issue where the names of the folders on their file system are not displayed correctly:

Figure 1 – folder names not displaying when downloading or checking out documents
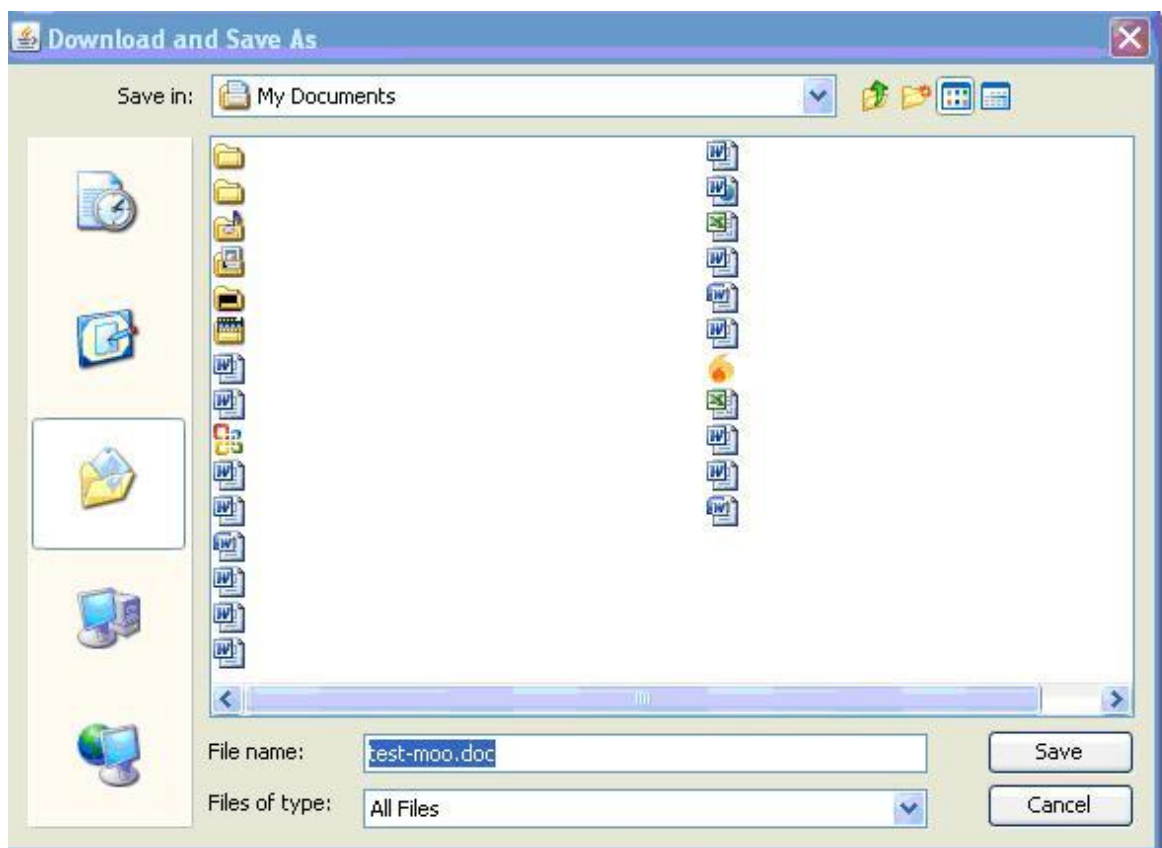
In order to correct this IE8 must be set to run in "compatibility mode". The compatibility mode is intended to enable users to access websites as if they were using an earlier compatible version of Internet Explorer. For your convenience the below link contains instructions from the Microsoft Support Website to turn on compatibility mode in the manner most appropriate to your organisation's requirements:

http://support.microsoft.com/kb/956197

1.5   Internet Explorer 9 and above

IE 9 and above is not currently supported for the use of the IMR or ECF2 components. This constraint exists because the third-party document management system on which the IMR is based does not offer support for IE 9.

1.6   Mozilla Firefox, Google Chrome & other Web Browsing Software

Xchanging does not currently offer support for any web browsing software other than Internet Explorer for the use of the IMR or ECF2 components.

1.7   Adding a Socket Permission for a Proxy Server

If a user accessing the Internet via a proxy server with a supported browser/JRE configuration still encounters issues with uploading or downloading documents, a change must be made to the Java policy file for each computer using the proxy. This is due to an incompatibility of the JRE/browser combination with certain proxy server configurations. The technical steps for this can be found in **section 1.8** and a worked example in **section 1.9**

1.8   Adding a Socket Permission to the Java System Policy File

The Java system policy file can be found at "{Java.home}/lib/security/Java.policy". After backing up the original file the following lines need to be added:

```
// Grant allowing signed applets to connect via the proxy
server over https
Permission Java.net.SocketPermission "PROXY-SERVER-HOST:PROXY-
SERVER-PORT", "connect, accept, resolve";
```

The section in red must be changed to the name and port of the proxy server in question. The computer will need to be restarted in order for the changes to take effect.

1.9   Worked Example of a Java System Policy File Change

(This example assumes the installation of JRE 1.5.0_06.)

1. Navigate to C:\Program Files\Java\jre1.5.0_06\lib\security (see figure 2)
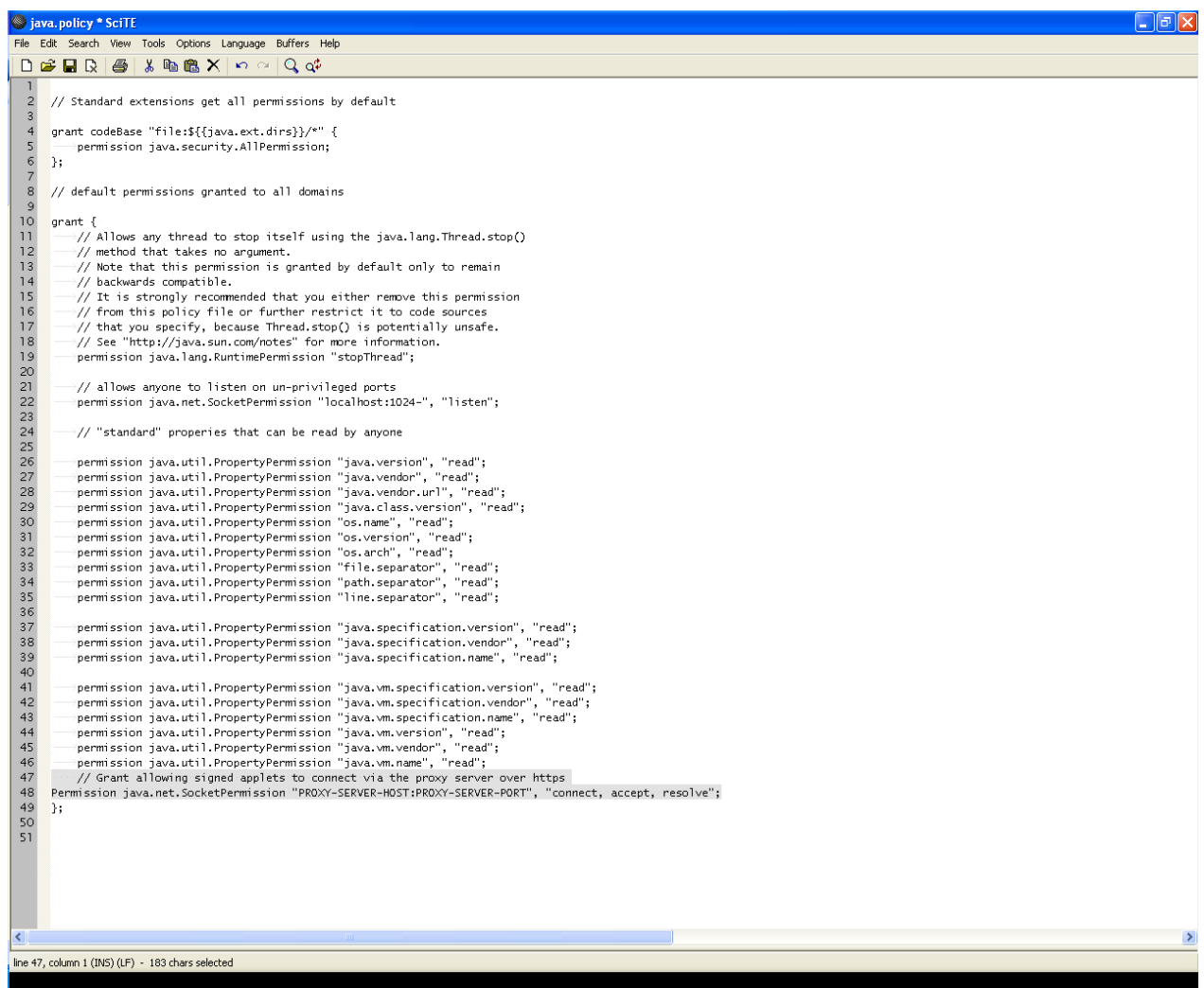
Figure 2 – Location of the Java Policy file
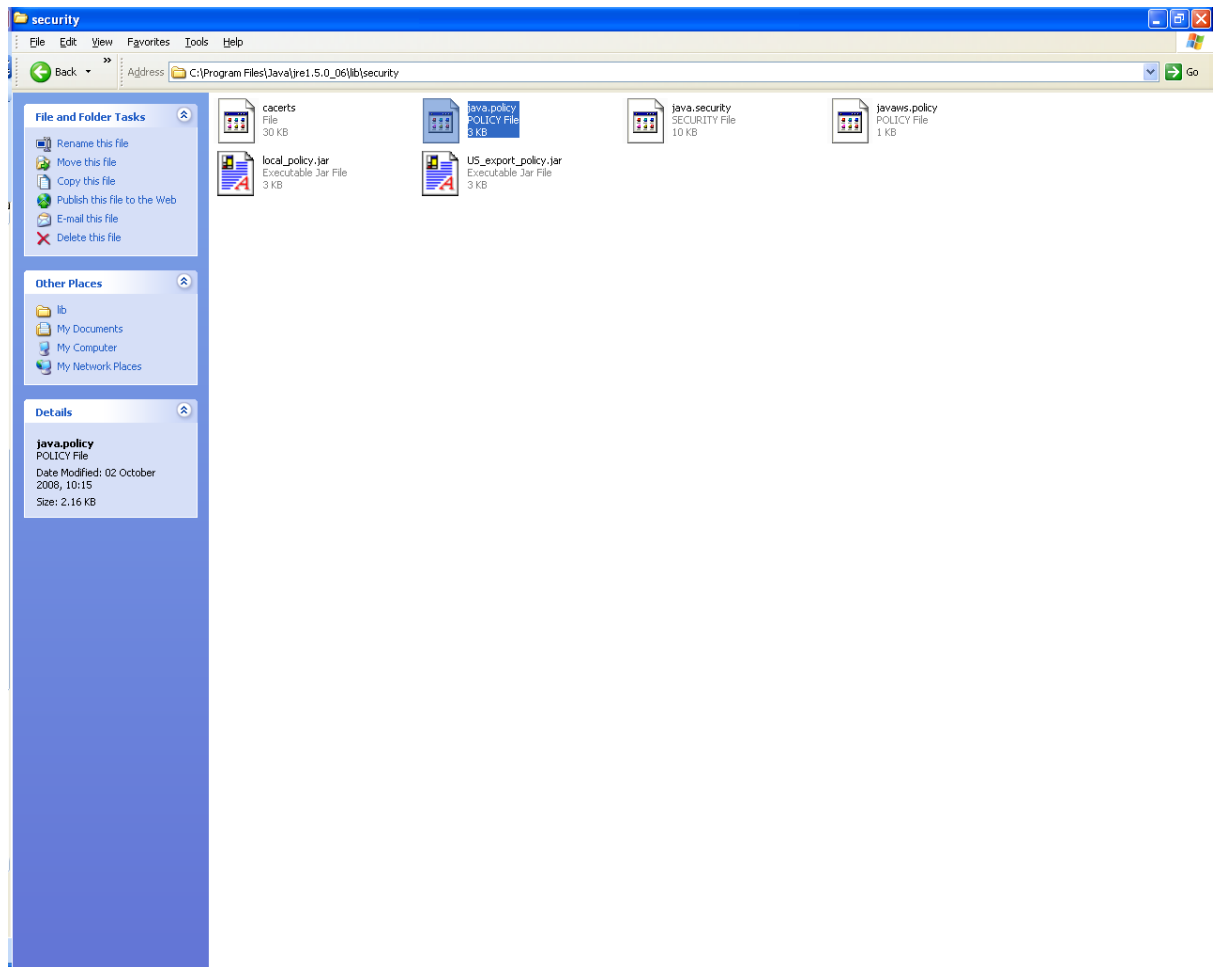
2. Copy the Java.policy file to a suitable location

3. Open the original file Java.policy in a text editor and paste in the below text:

```
// Grant allowing signed applets to connect via the proxy
server over https
Permission Java.net.SocketPermission "XPROXY:8080", "connect,
accept, resolve";
```

Figure 3 – Opening and editing the Java Policy file

```
// Standard extensions get all permissions by default

grant codeBase "file:${{java.ext.dirs}}/*" {
    permission java.security.AllPermission;
};

// default permissions granted to all domains

grant {
    // Allows any thread to stop itself using the java.lang.Thread.stop()
    // method that takes no argument.
    // Note that this permission is granted by default only to remain
    // backwards compatible.
    // It is strongly recommended that you either remove this permission
    // from this policy file or further restrict it to code sources
    // that you specify, because Thread.stop() is potentially unsafe.
    // See "http://java.sun.com/notes" for more information.
    permission java.lang.RuntimePermission "stopThread";

    // allows anyone to listen on un-privileged ports
    permission java.net.SocketPermission "localhost:1024-", "listen";

    // "standard" properies that can be read by anyone

    permission java.util.PropertyPermission "java.version", "read";
    permission java.util.PropertyPermission "java.vendor", "read";
    permission java.util.PropertyPermission "java.vendor.url", "read";
    permission java.util.PropertyPermission "java.class.version", "read";
    permission java.util.PropertyPermission "os.name", "read";
    permission java.util.PropertyPermission "os.version", "read";
    permission java.util.PropertyPermission "os.arch", "read";
    permission java.util.PropertyPermission "file.separator", "read";
    permission java.util.PropertyPermission "path.separator", "read";
    permission java.util.PropertyPermission "line.separator", "read";

    permission java.util.PropertyPermission "java.specification.version", "read";
    permission java.util.PropertyPermission "java.specification.vendor", "read";
    permission java.util.PropertyPermission "java.specification.name", "read";

    permission java.util.PropertyPermission "java.vm.specification.version", "read";
    permission java.util.PropertyPermission "java.vm.specification.vendor", "read";
    permission java.util.PropertyPermission "java.vm.specification.name", "read";
    permission java.util.PropertyPermission "java.vm.version", "read";
    permission java.util.PropertyPermission "java.vm.vendor", "read";
    permission java.util.PropertyPermission "java.vm.name", "read";
    // Grant allowing signed applets to connect via the proxy server over https
Permission java.net.SocketPermission "PROXY-SERVER-HOST:PROXY-SERVER-PORT", "connect, accept, resolve";
};
```

line 47, column 1 (INS) (LF) - 183 chars selected

4. Save the change and restart the computer.

Section 2. ECF2 homepage & Single Sign-On Requirements

The general ECF2 workstation configuration requirements are the same as for the IMR. See **section 1.3** for the compatibility guide.

2.1   Browser Rendering Problems

Figure 4 demonstrates an issue with the rendering of the ECF2 log in page. In these situations, there is often a warning icon in the bottom left of the screen and clicking on that icon and selecting "Show Details" will display the dialogue box showing that this is due to a JavaScript error as shown.

Figure 4 - Example of the Log in page not rendering correctly and JavaScript warning

Service.Centre@xchanging.com

To become an ECF2 user, please register your interest by clicking here

Login

User Name:

Password:

Log In

Xchanging Service Centre

Core Service Hours report a problem   Monday - Friday 07:00

Contact the Xchanging Service Centre: (excluding English public and bank holidays).

Telephone   +44 (0) 870 380 0830
During Core Service Hours ECF2 shall be available to all registered users.

Email   Service.Centre@xchanging.com
All user related queries and problems in this period will be addressed by the Xchanging Service Centre.
For telephone enquiries during Core Service Hours a Service Centre Operator will respond, for Non-Core Service Hours an

Non-Core Service Hours

Monday to Thursday 03.00 to 07.00 and 19.00 to 22.00 UK time (excluding English public and bank holidays).

Friday 03.00 to 07.00 and 19.00 to 20.00 UK time (excluding English public and bank holidays).

Saturday 07:00 to 19:00 UK time (excluding English public and bank holidays).

During Non-Core Service Hours ECF2 should be available to all registered users.

Any user related queries and problems raised to the Xchanging Service Centre during these periods, will only be actioned

Scheduled Downtime

Any period outside Core and Non-Core Service Hours is Scheduled Downtime and access to ECF2 is not guaranteed.

Any user related queries and problems raised to the Xchanging Service Centre during this period, will only be actioned during Core Service hours.

Internet Explorer

Problems with this Web page might prevent it from being displayed properly or functioning properly. In the future, you can display this message by double-clicking the warning icon displayed in the status bar.

Always display this message when a page contains errors.

OK   Hide Details <<

Line: 67
Char: 5
Error: 'is_ie6up' is undefined
Code:0
URL: https://sso.xchanging.com/portal/UI/Login

Previous   Next

Done, but with errors on page.   Internet

start   Cannot find server - ...   Document1 - Microsof...   untitled - Paint   Search Desktop

This problem is caused by an issue with SSL handling in Internet Explorer. To fix this issue a change must be made as follows:

1. Click "Tools" on the browser top menu

2. From the menu select "Internet Options"

3. In the Internet Options pop-up window, select the 'Advanced' tab

4. Un-check "TLS 1.0"

5. Click OK

Figure 5 – Un-check TLS 1.0 to correct display problems caused by JavaScript error

Section 3. Document File Viewer (DFV)

Document File Viewer (DFV) is an ECF2 component integrated with the IMR that allows the end user to view claim documents as a single, searchable composite PDF document.

3.1 Adobe Reader

As a prerequisite, DFV requires Adobe Reader to be installed on users' workstations as the default PDF renderer. As part of its installation, Adobe Reader is automatically integrated as a plug-in with pre-installed Internet Explorer browser. There is no interdependency between the installed JRE version and DFV.

Table 3 shows a compatibility matrix of browsers and operating systems with Adobe Reader. Please note that only the stated versions of Adobe are supported by DFV. Any versions not listed in the table below, including later versions, are not supported.

Table 4 – Adobe Reader and browser/OS compatibility

	Adobe Reader 7.0.9	Adobe Reader 7.1.0	Adobe Reader 8.2	Adobe Reader 9.3
Internet Explorer 6.0	✓	✓	✓	✓
Internet Explorer 6.0 SP1	✓	✓	✓	✓
Internet Explorer 7.0	✓	✓	✓	✓
Internet Explorer 8.0	✗	✗	✗	✓ (9.1)
Windows XP SP1	✓	✗	✗	✗
Windows XP SP2	✓	✓	✓	✓
Windows XP SP3	✗	✗	✓	✓
Windows Vista SP1	✗	✗	✓	✓
Windows Vista SP2	✗	✗	✓	✓

Section 4. Claims Workflow Services (CWS)

4.1 ActiveX Components

In order to use CWS the browser on the client workstation requires installation of a number of ActiveX components. Two options exist for the installation of the required components.

Option 1

When a user logs in and links to the CWS system for the first time, the system will display a prompt for downloading ActiveX components. A Security Warning window similar to that below will be displayed. Proceed as follows:

1. Click 'Yes' to download the 'Pegasystems Inc.' components.

2. Click 'Install' to install the Pegasystems Inc. components.

Figure 6 – installing Active X components

3. It is recommended that users click 'Always trust content from Pegasystems Inc.' so that they do not receive the same prompt every time they use CWS. This checkbox will be displayed on clicking the 'More options' button. The pop-up will prompt multiple times until it installs all ActiveX controls; please always click on Yes / Install.

Note that if an ActiveX control is locked by another browser process, the user may be prompted to restart the workstation.

Option 2

For larger organisations it may be of benefit to prepare user desktops before initial use of CWS. An executable can be downloaded from:

http://www.londonmarketgroup.co.uk/Documents/RD_Claims/OCXInstaller.zip

From within this archive run the file ocx_installer.exe

Figure 7 – installing Active X components –install screens
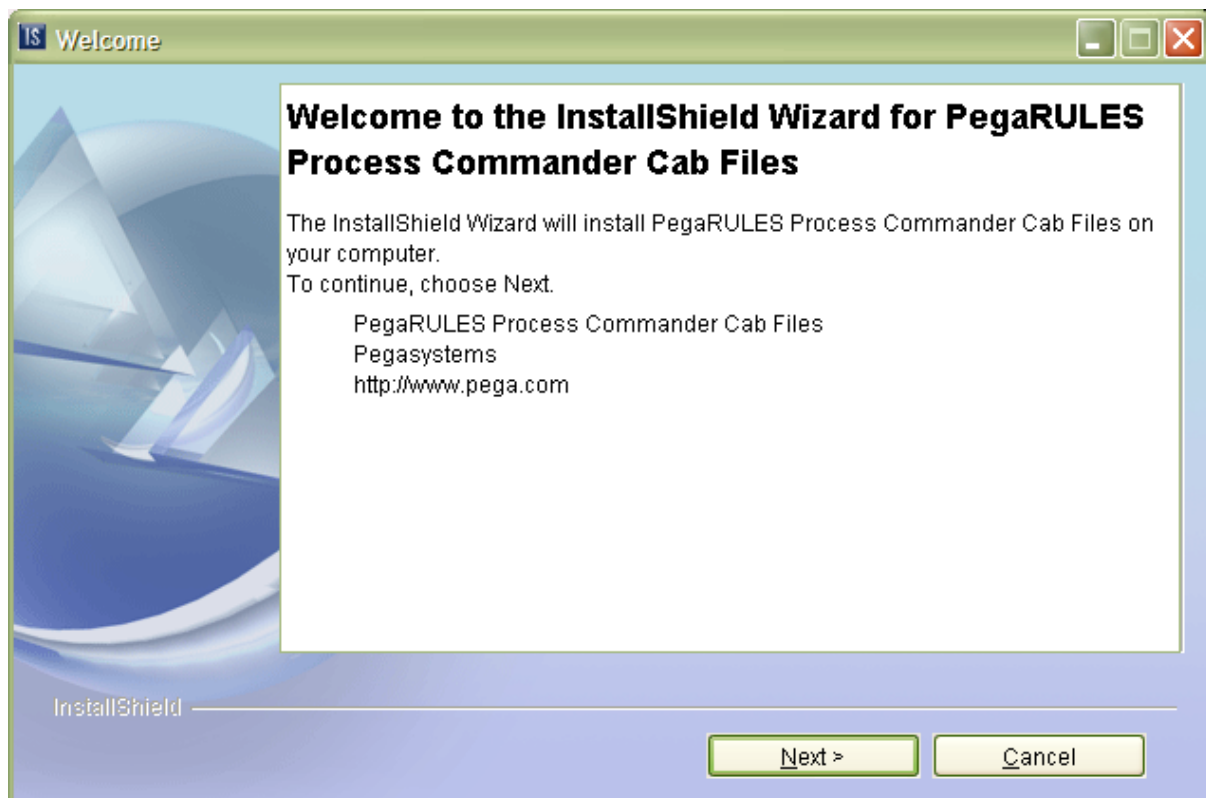
Click 'Next'
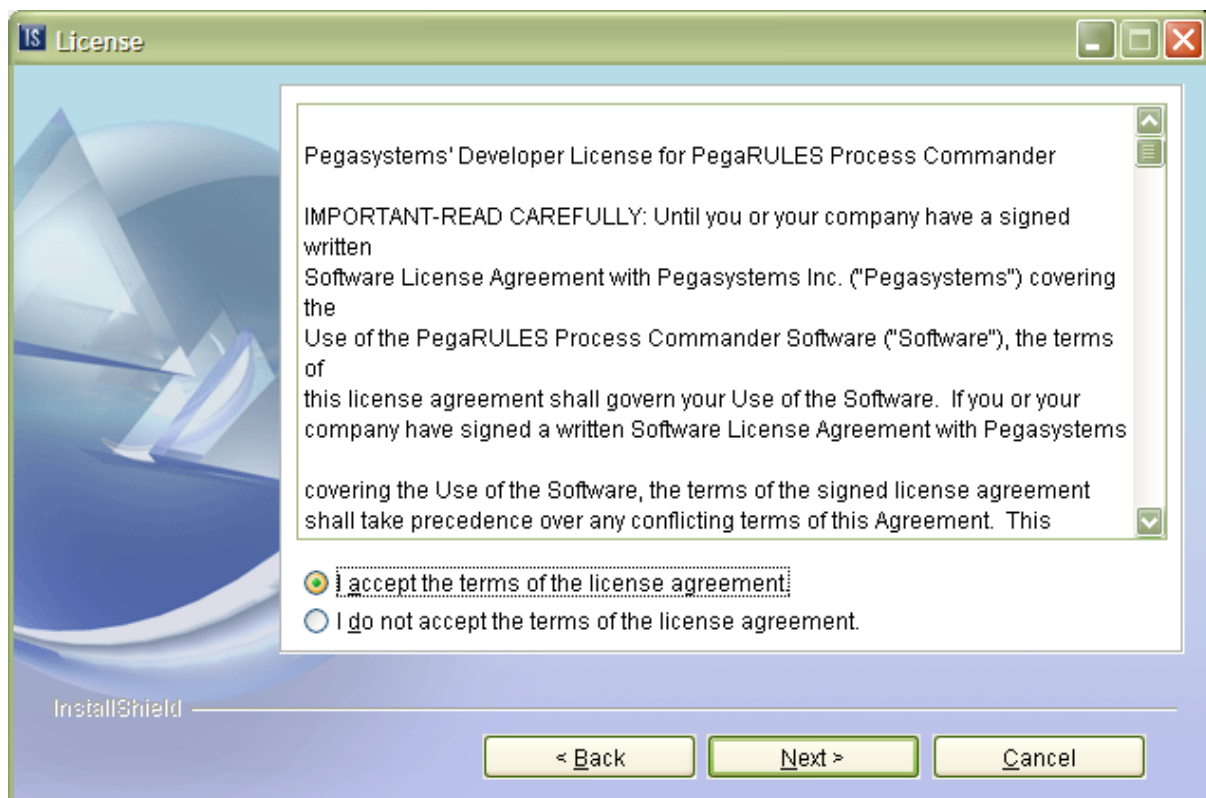
Accept the terms of the licence agreement and click 'Next'
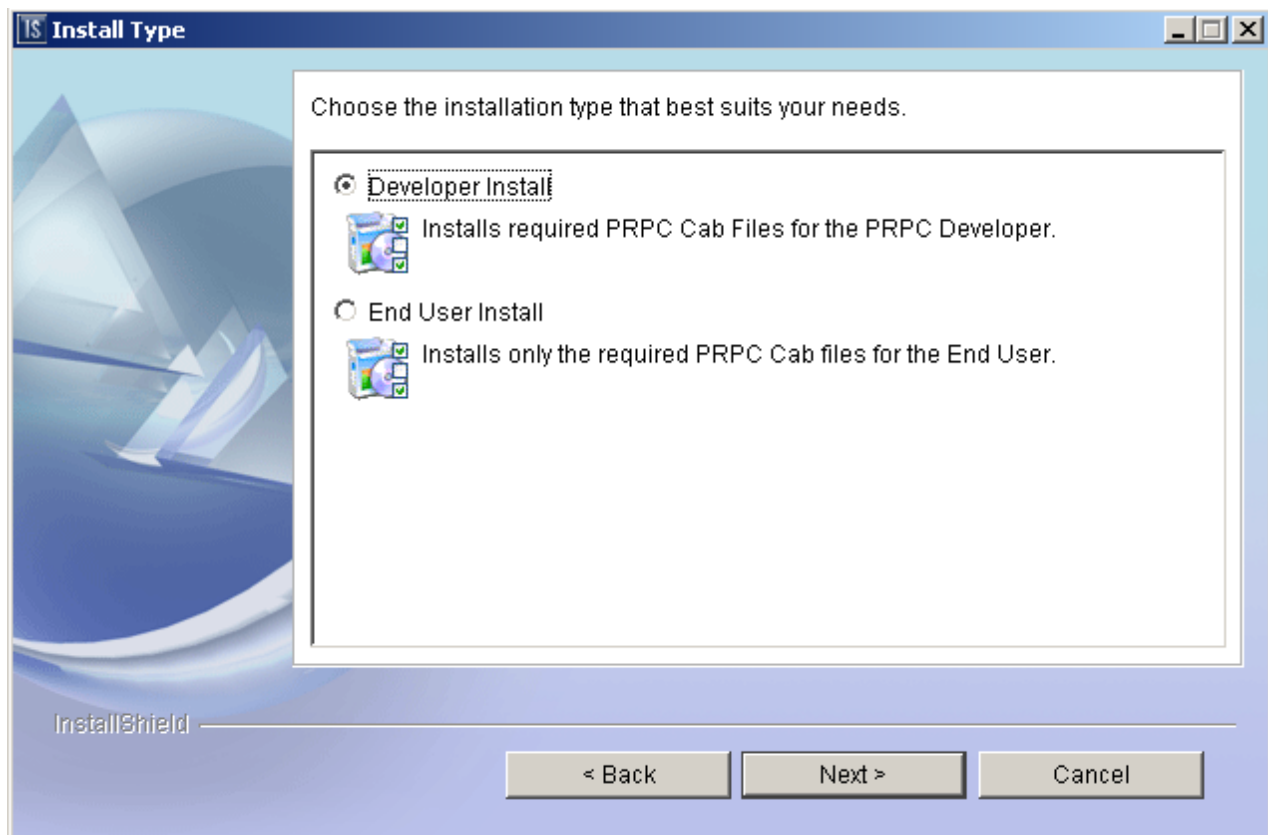
Choose 'Developer Install' and click 'Next'. Although the name is misleading, the developer option will provide CWS end users with the files that they require.

4.2 Additional Client Software

To utilise the 'Edit in Excel' functionality available in Decision Tables, the client workstation must have Microsoft Excel version 2003 or 2007 installed. No other Office versions are supported.

4.3 Adobe Flash Player

CWS requires Adobe Flash player to display the work dashboards. To install Adobe flash player click the link in CWS or navigate to:

http://get.adobe.com/flashplayer/

Figure 8 – installing Adobe Flash Player – install screens
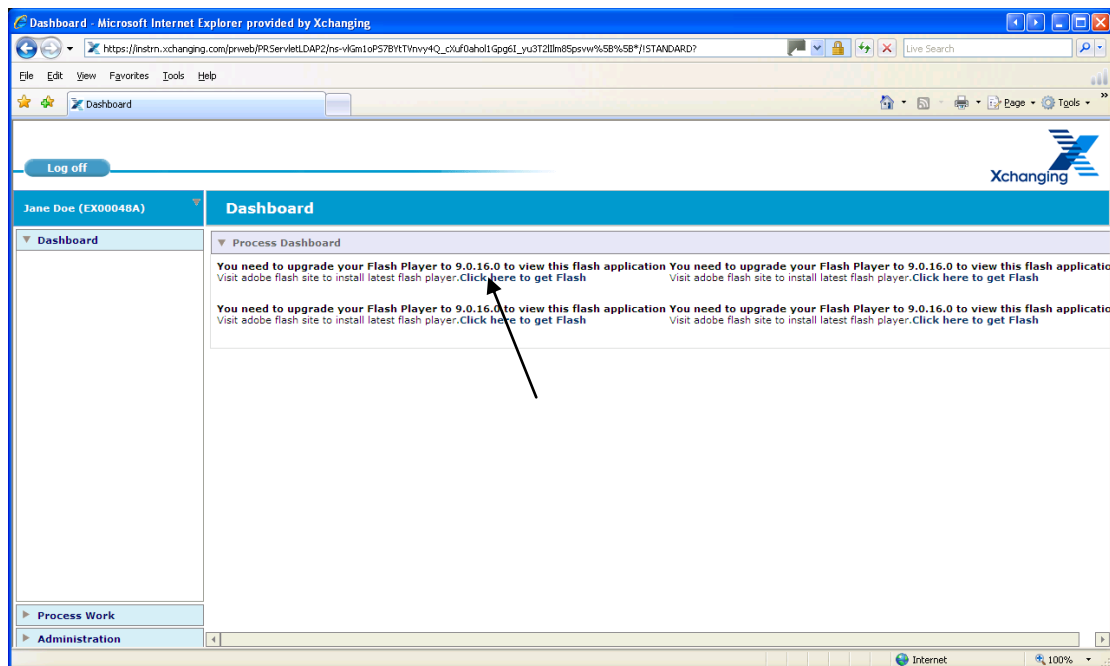
You will be directed to the following screen. Remove the tick for the Google toolbar and click download.
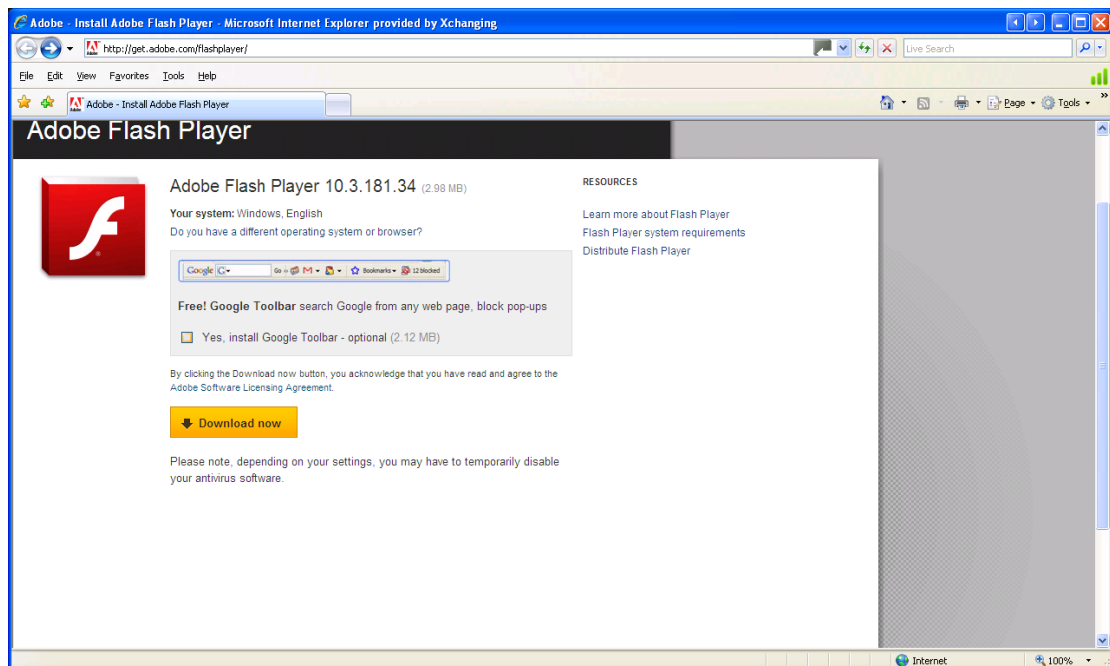
When File Download dialogue box appears, click "Run".

When the Security Warning dialogue box appears, click "Run".

Flash player will now install. Once complete click "Finish".
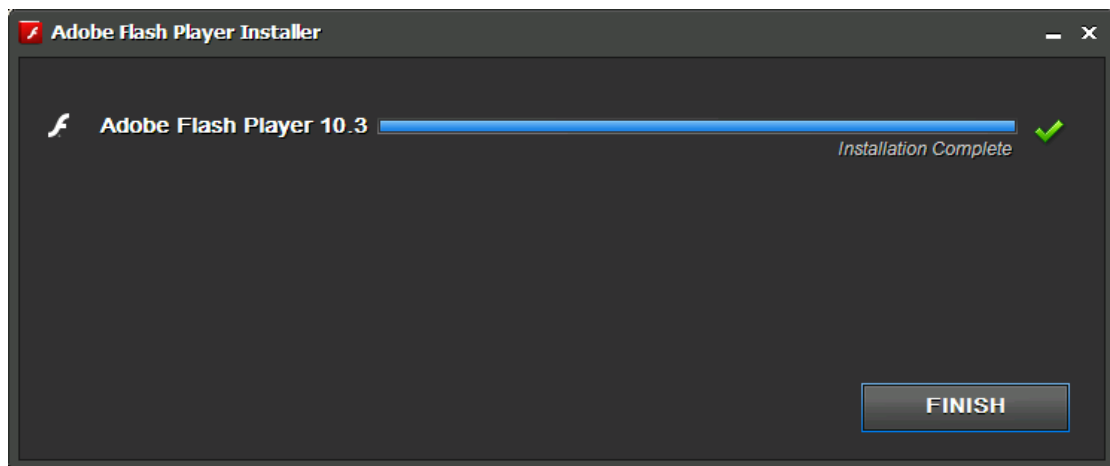
The browser will then direct you to a confirmation screen and Adobe Flash player will be installed.
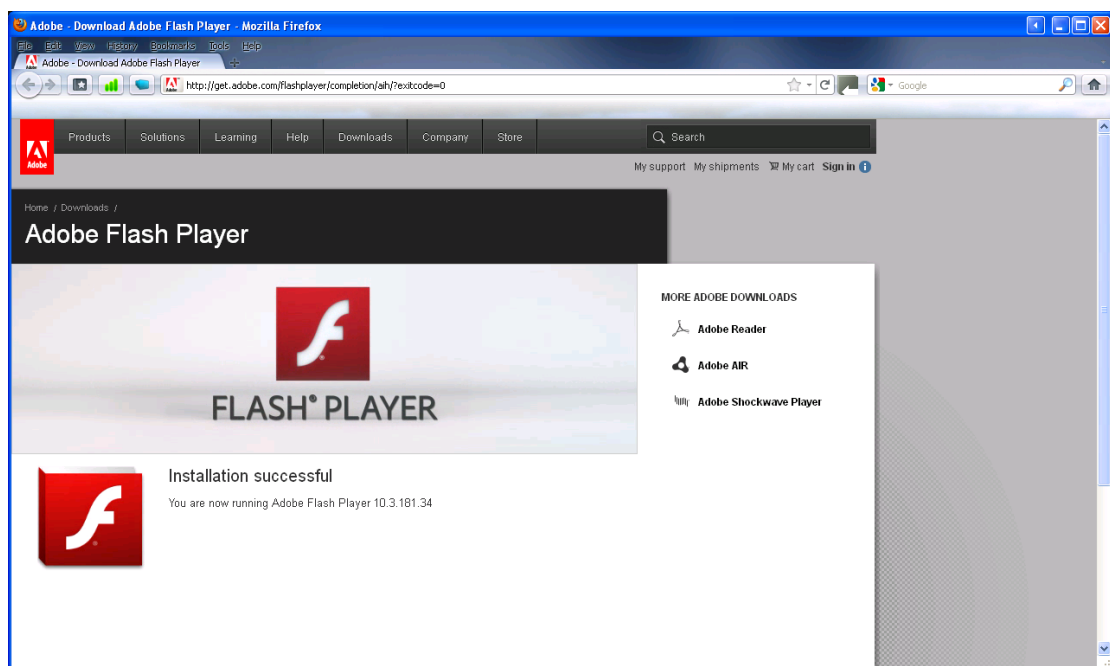
Now select the CWS window and refresh the dashboard to confirm that the data displays correctly.

Figure 9 – Confirm Flash Player installation in CWS screen
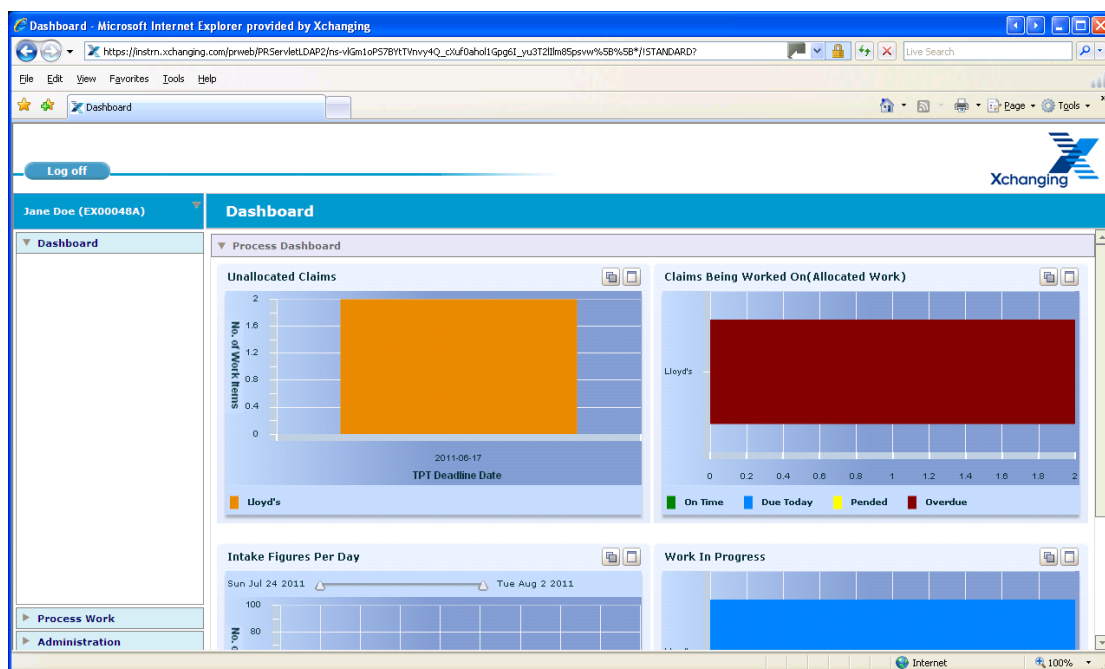
Section 5. Claims Agreement Screens (CAS)

The Claims Agreement Screens (CAS) application provides a web-based user interface that presents claims data in order for claims handlers to review a claim, and then to make a response. The data presented in the CAS user interface may come from either CLASS or the IMR and responses may be sent to both CLASS to update the claim/transaction and to CWS to update the work item status.

No specific workstation configuration is needed in order to use CAS.

Section 6. Claims Data Warehouse (CDW)

The CDW is a repository of business claims data used to create reports for registered users. The reports can be accessed via the Infoview portal using a web browser.

6.1   Screen Resolution

Screen resolution of [1024] x [768] is recommended.

6.2   Issues with saving reports

If a security pop-up message blocks the user from saving reports to Excel then Internet Explorer settings should be changed as follows:

1. Click "Tools" on the browser top menu
2. From the menu select "Internet Options"
3. Click the "Security" tab
4. Click "Custom Level"
5. Scroll Down to "Downloads"
6. Set automatic prompting for file downloads to "Enable" as per figure 10 below:

Figure 10 – Set automatic prompting for file downloads
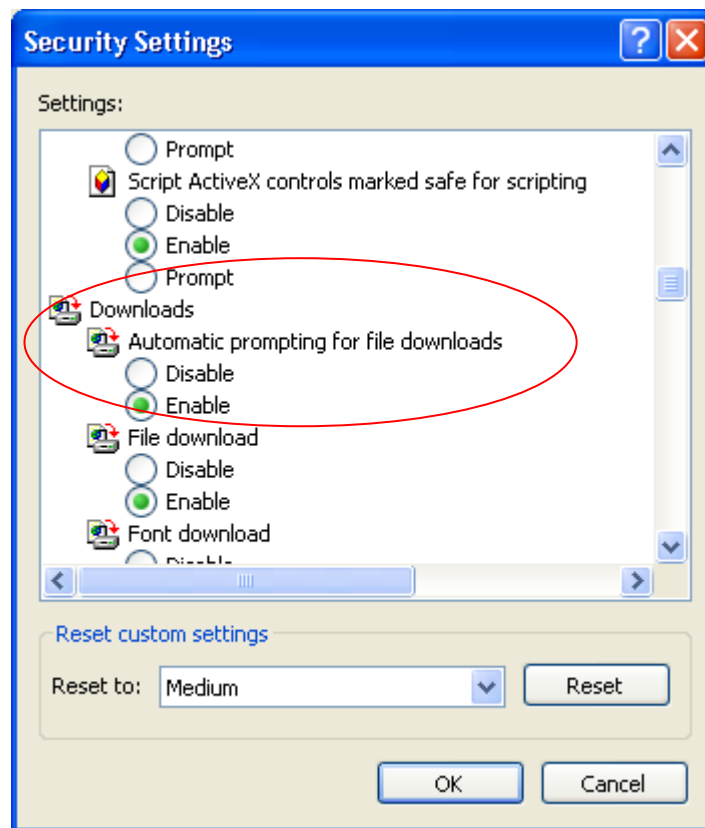
6.3 Logging off InfoView

Currently default internet settings will mean that a user has to select 'Log-off' three times before being logged off the system. In order to correct this following setting needs to be changed:

1. Click "Tools" on the browser top menu

2. From the menu select "Internet Options"

3. Click the "Security" tab

4. Click "Custom Level"

5. Scroll Down to "Miscellaneous"

6. Set Display mixed content to "Enable" as per figure 11 below:

Figure 11 – Set display mixed content
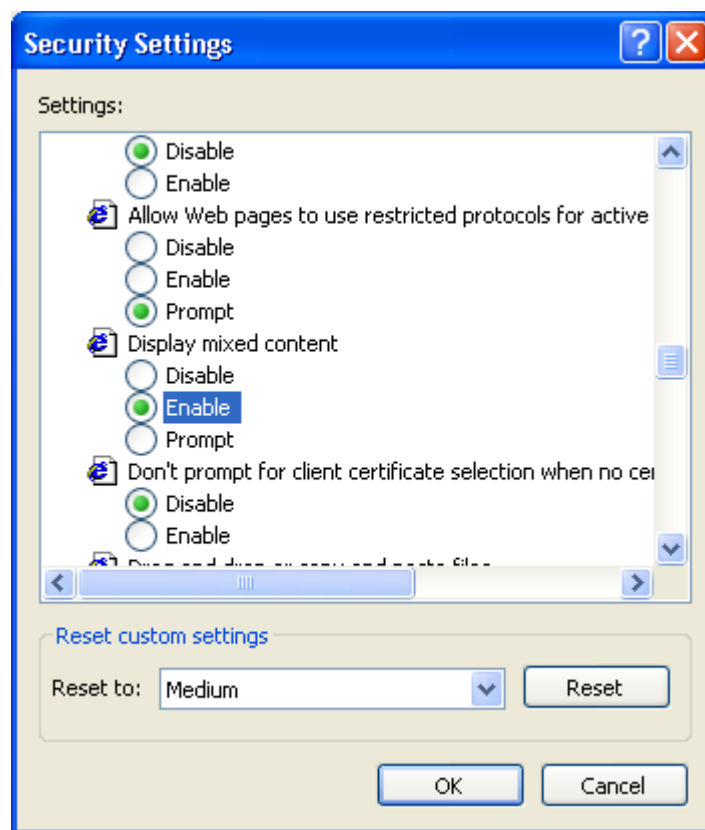
Section 7. General Settings

7.1 Supported Operating Systems

Xchanging offer support for the Microsoft Windows operating systems for the use of the IMR or ECF2 components. The following versions are supported:

- XP Professional (SPs 1, 2 & 3)

- Vista (SPs 1 & 2)

Please note that earlier and later versions of Windows, including Windows 7, are not supported.

7.2 'Secure and Non-Secure' Reminders

When navigating IMR or ECF2 components a browser alert labeled 'Security Information' may appear with the text:

'This page contains both secure and nonsecure items. Do you want to display the nonsecure items?'

This is a superfluous alert; please follow the below steps to suppress this pop-up:

1. Click "Tools" on the browser top menu
2. From the menu select "Internet Options"
3. Select the 'Security' tab and make sure the Internet globe icon is selected, and then click the 'Custom Level' button.
4. Scroll down to the 'Miscellaneous' section and find the option 'Display mixed content'.

Figure 12 – changing IE security settings to suppress alert
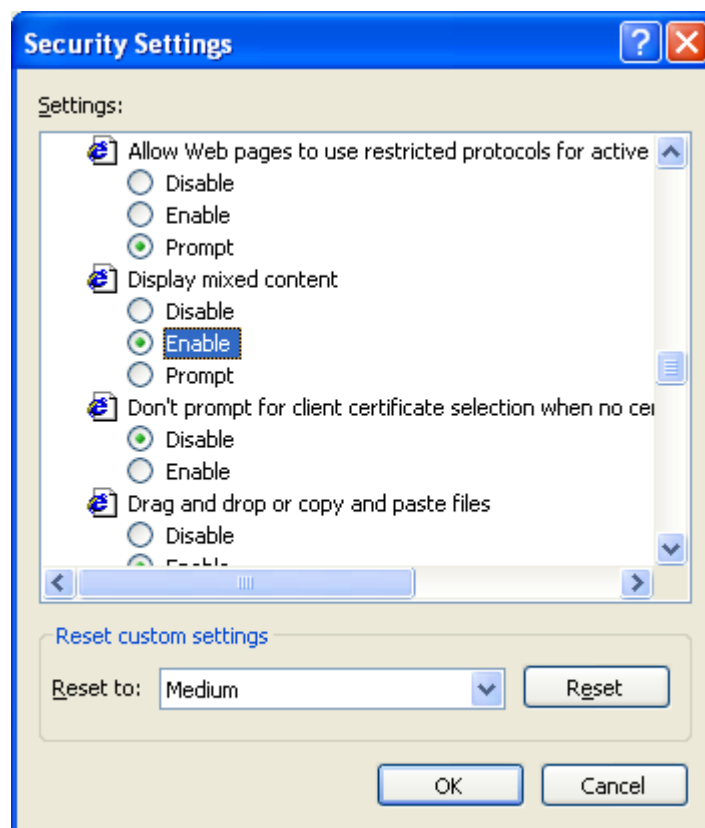
5. Select the option 'Enable'

6. Click OK, then you will get a "Security Warning" pop-up. Click Yes

7. Click OK also on the "Internet Options" window to finish.

7.3 Enabling Pop-Ups

If users' browsers are set to block pop-ups then an entry in the IE configuration must be changed to enable pop-up requests coming from ECF2 components such as DFV and CDW.

i. Click "Tools" on the browser top menu

ii. From the menu select "Internet Options"

iii. In the Internet Options pop-up window, select the 'Privacy' tab, and click on the Settings button in the section 'Pop-up Blocker'.

Figure 13 – changing pop-up settings
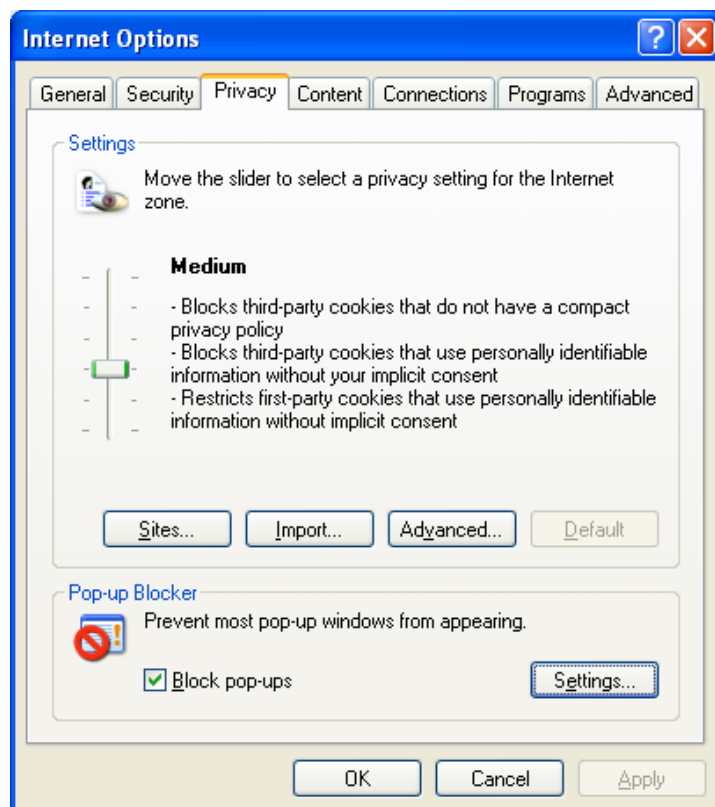
iv. In the text box under "Address of Web site to allow" enter **https://ins.xchanging.com** – and click 'Add' and then 'Close'.

Figure 14 – adding ECF2 address as an exception
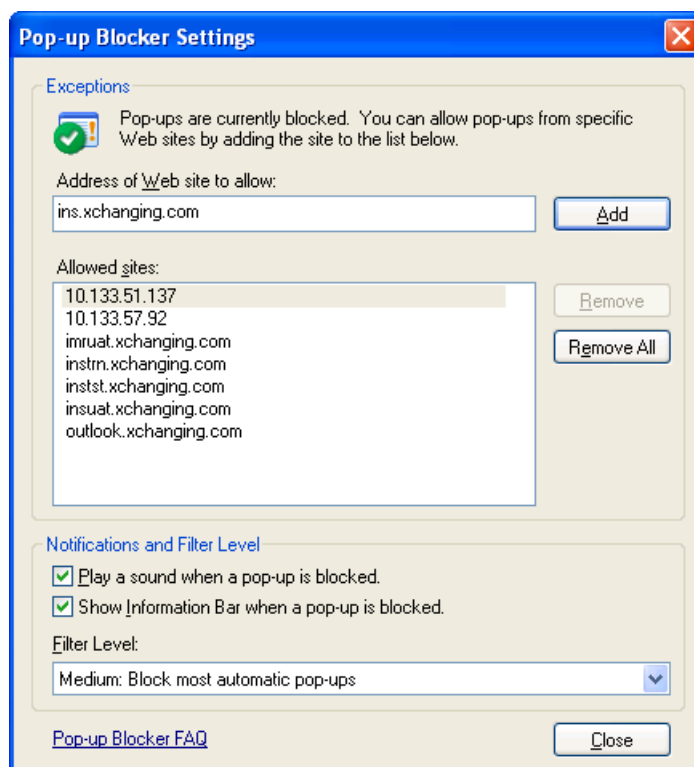
v.   On the Internet Options pop-up click OK

It is not recommended that any third-party toolbars using additional pop-up blockers are installed.

7.4   Access via Citrix virtual desktops

This is the known working configuration for accessing IMR & ECF2 services via Citrix:

Citrix Components:

- Citrix Online Plug-in   2.1.0.30
- Citrix Receiver   2.1.45663.0
- Citrix Self-Service Plug-in   2.0.0.27090
- Citrix Tools for virtual machines   5.6.39215
- Citrix virtual desktop agent   5.0.0.148

Machine information:

- Windows 2003 based XenApp 5 install

- 4GB RAM
- Dual CPU
- Office 2003
- Sun Java JRE 6 Update 13 (must be this version)
- Internet Explorer 6 SP1
- Adobe Acrobat Reader 9.4
- Adobe Flash Player 10

The following updates were also applied in the Citrix environment

- KB2345886
- KB971737
- KB973825
- KB2388210
- KB2443685
- KB2476490
- KB2503665
- KB2507938
- KB2530548
- KB2535512
- KB2536276
- KB2544521
- KB2544893
- KB2555917
- KB925398_WMP64
- KB926122
- KB970430
- KB971513

Section 8.   Revision History

Version	Date	Author	Description
11	09/11/2011	Xchanging	i. Converted document to Xchanging standard format. ii. IE8 support added iii. Citrix support added iv. Details for CDW section added
12	08/12/2011	Xchanging	i. Added explicit statement on Windows 7

Section 9. Appendices

9.1 Supported JREs for download

For your convenience links to the supported JREs are listed below.

Table 5 - JRE Download Links

Sun Java Runtime Environment (JRE)	URL for download
1.5.0	http://Java.sun.com/products/archive/j2se/5.0/index.html
1.5.0_01	http://Java.sun.com/products/archive/j2se/5.0_01/index.html
1.5.0_02	http://Java.sun.com/products/archive/j2se/5.0_02/index.html
1.5.0_03	http://Java.sun.com/products/archive/j2se/5.0_03/index.html
1.5.0_04	http://Java.sun.com/products/archive/j2se/5.0_04/index.html
1.5.0_05	http://Java.sun.com/products/archive/j2se/5.0_05/index.html
1.5.0_06	http://Java.sun.com/products/archive/j2se/5.0_06/index.html
1.5.0_07	http://Java.sun.com/products/archive/j2se/5.0_07/index.html
1.5.0_08	http://Java.sun.com/products/archive/j2se/5.0_08/index.html
1.5.0_09	http://Java.sun.com/products/archive/j2se/5.0_09/index.html
1.5.0_10	http://Java.sun.com/products/archive/j2se/5.0_10/index.html
1.5.0_11	http://Java.sun.com/products/archive/j2se/5.0_11/index.html
1.5.0_12	http://Java.sun.com/products/archive/j2se/5.0_12/index.html
1.5.0_13	http://Java.sun.com/products/archive/j2se/5.0_13/index.html
1.5.0_14	http://Java.sun.com/products/archive/j2se/5.0_14/index.html
1.5.0_15	http://Java.sun.com/products/archive/j2se/5.0_15/index.html

1.5.0_16	http://Java.sun.com/products/archive/j2se/5.0_16/index.html
1.5.0_17	http://Java.sun.com/products/archive/j2se/5.0_17/index.html
1.6.0	http://Java.sun.com/products/archive/j2se/6/index.html
6u1	http://Java.sun.com/products/archive/j2se/6u1/index.html
6u2	http://Java.sun.com/products/archive/j2se/6u2/index.html
6u3	http://Java.sun.com/products/archive/j2se/6u3/index.html
6u4	http://Java.sun.com/products/archive/j2se/6u4/index.html
6u5	http://Java.sun.com/products/archive/j2se/6u5/index.html
6u7	http://Java.sun.com/products/archive/j2se/6u7/index.html
6u10	http://Java.sun.com/products/archive/j2se/6u10/index.html
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6u12	http://Java.sun.com/products/archive/j2se/6u12/index.html
6u13	http://java.sun.com/products/archive/j2se/6u13/index.html
6u23	http://java.sun.com/products/archive/j2se/6u23/index.html