



Document Management Interface

Introduction

Insurance is an industry dominated by forms, printed material, images and other associated electronic files. Managing this vast range of documentation often requires a document management system (DMS). There are numerous DMS suppliers in the market offering sophisticated and innovative solutions to the scanning, filing, retrieving and viewing of your documentation in an orderly fashion. For this reason, Ebix has designed and published a Document Management Interface Standard. We believe our clients should be able to choose a DMS solution that best suits their individual requirements.

What is it?

The Ebix Document Management Interface (DMI) is a standard XML interface between the Ebix broker software and the DMS. It is intended to allow the broker to efficiently transfer data and documents from the Ebix broker software to the DMS installed on their system. Participation in this interface is open to all DMS suppliers.

Access to information in a DMS is provided at functional level, allowing a broker to view all documents in the DMS at a macro Client level, or at a micro level individually to select documents relating, for example, only to a specific policy or claim.

The obvious benefits of such an interface are:

Instant retrieval:

Find documentation related to a specific account without having to search through folders. Pressing the DMI button in the Ebix application is all you need to do.

Accurate filing:

Documents created by the Ebix application are automatically filed in the correct location in the DMS without having to search for and locate folders.

The Ebix DMI Interface

The DMI has two operational modes:

- allowing a broker to access documents, files, images etc stored in the DMS from multiple points within the Ebix broker software
- allowing the DMS to reference documents to an Ebix software client code or related third party such as an Insurer or Associate

DMI Interface Setup

Initial set-up of the DMI stores a path to the location of the DMS software. This establishes the primary connection so that the DMS can be launched by the broker from multiple points within the Ebix software. Requests for documents from within Ebix Software will launch

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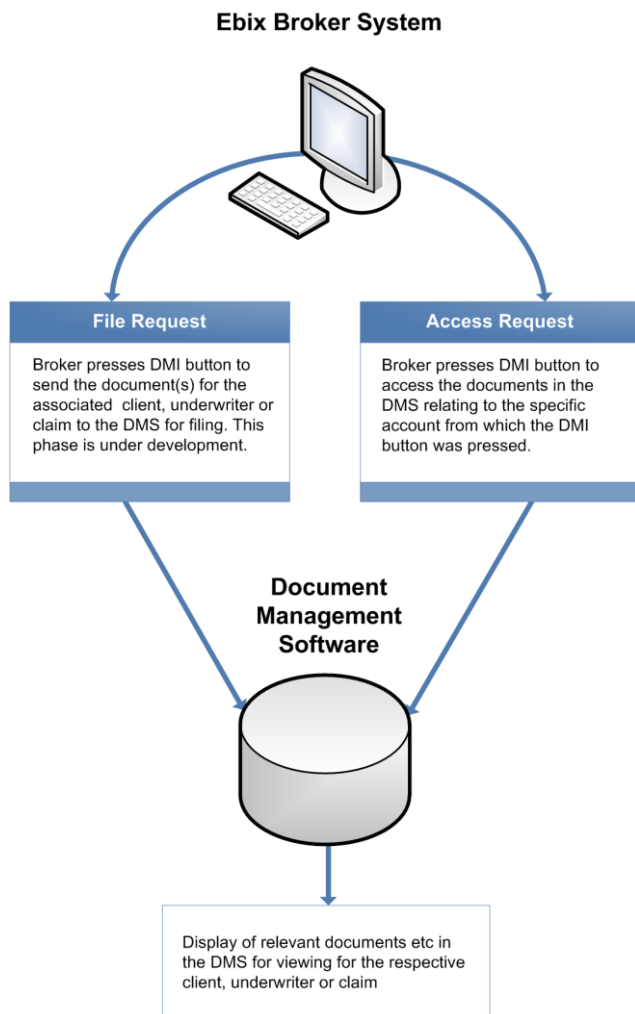
the DMS and allow the broker to access documents in the DMS at a client, policy or claim level.

Additional Functionality

The DMI also caters for documents related to parties that a broker deals with such as insurers, associates and third party brokers.

Included within the DMI are standards for launching document management systems and exporting information from the Ebix software to the DMS.

DMI Interface at a Glance



Activating the Interface

DMI interface activation is requested by the DMS supplier once the supplier has confirmed the installation of their Ebix DMI compliant document management software.

Interface Standards

Standards used in the Interface are maintained by Ebix Australia in cooperation with our DMS industry partners. The purpose of the DMI is to provide suppliers of document management software with a standard mechanism to interface their software to all Ebix broker software solutions. Interface functionality may vary within the supported Ebix broker software product range.

System Requirements

The interface is supported in our CBS, eGlobal and WinBEAT products.

The Ebix DMI is an optional module available under licence from Ebix Australia. Contact your local Ebix office or your participating Document Management Software supplier for additional information.