

**Pega Foundation for Insurance
Installation Guide
7.4**



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Document: Pega Foundation for Insurance Installation Guide

Software version: 7.4

Feedback

If you have suggestions or comments for how we can improve our materials, send an email to AppDocBug@pega.com.

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Prerequisites

Before you install the Pega Foundation for Insurance application, make sure that you complete all of the following tasks.

1. Review the database policies and application permissions that are used by your Pega Platform installation. Determine whether the application is permitted to update the database automatically or if you must generate the database scripts that your organization will use to manually make schema changes.
2. Install Pega Platform 7.4, and then verify your installation as described in the *Platform Installation Guide* for your environment, available on the [Deployment Guides page](#).
3. Apply any required hotfixes to the Pega Platform before proceeding with the Pega Foundation for Insurance application installation. For a list of required hotfixes for Pega Platform, see the [Pega Foundation for Insurance Hotfix page](#).
4. Update the Pega Platform online help to the latest version from the Online Help Files section on the [Pega Platform Update](#) page. After you download the latest prhelp.war file, deploy it in your Pega Platform installation before continuing. For deployment information, see the [Pega Platform Installation Guide for your application server](#).
5. If you are using Db2 9.7 or higher, enable the **Automatic REORG** setting as described in the documentation provided with your database system. Set each of the following configuration parameters to ON: `auto_maint`, `auto_tbl_maint`, and `auto_reorg`.

For steps to import the Pega Foundation for Insurance sample data, see [Importing Pega Foundation for Insurance sample application and operators](#).

Backing up your system

Back up the database, your application files, and Pega Platform in case you need to restore your system.



Note: The deployment process modifies both the data schema and the rules schema. Use a backup procedure that preserves both schemas.

1. Verify that all rules are checked in.
2. Shut down the Pega Platform application server.
3. Use your database utilities to complete an offline back up of the Pega database.
4. Back up the configuration and environment files. If you edited any of the following Pega Platform configuration files in the APP-INF\classes directory of an EAR deployment or the WEB-INF\classes directory of a WAR deployment, include these files in the backup:
 - `prbootstrap.properties`
 - `prconfig.xml`
 - logging file: `prlogging.xml` or `prlog4j2.xml`
 - `web.xml`
 - `pegarules.keyring` or any other `.keyring` files
5. Back up any third-party or custom JAR files that you installed. Redeploying the Pega Platform applications might delete these from your application server.

Installing the application

Follow these steps to install the application.

1. [Configuring your environment to support Db2 on Z/OS](#)
2. [Importing the application bundle](#)
3. [Importing Pega Foundation for Insurance sample application and operators](#)
4. [Enabling sample operator accounts](#)
5. [Creating a new dynamic system settings instance for Db2 on z/OS installations](#)
6. [Configuring an email account](#)

Configuring your environment to support Db2 on Z/OS

If you are installing Pega Foundation for Insurance and need to support a Db2 on Z/OS environment, see the *Pega Platform Installation Guide 7.4* for IBM Db2-z/OS systems, available on the [Deployment Guides page](#).

Although Pega Foundation for Insurance does not impose restrictions or special considerations for Db2 on Z/OS environments, please be aware that when you are installing an application in a Db2 on Z/OS environment, choosing the **Automatic** option during the [Importing the application bundle](#) process automatically takes advantage of the implicit tablespace creation that Db2 provides. For this to be successful, you must create Storage Groups and LOB Buffer pools for use by Pega 7.4 and grant permission to the #DBOWNER userid to use them.

For environments in which you want the tables to be created in explicitly defined tablespaces (which you would need to create separately before beginning your installation), you should choose the **Manual** option during the [Importing the application bundle](#) process when you download the DDL scripts that are generated. You can then have your database administrator modify the scripts to include tablespace names in the DDL file.

Importing the application bundle

The system data and rulesets for Pega Foundation for Insurance are loaded during this step.

1. Log in to the Pega Platform (<https://<hostname>:<port>/prweb>) by entering the administrative ID that you set up when you installed Pega Platform, such as `administrator@pega.com`, and the password that you specified.
2. If your database type is Db2 for z/OS, create a new dynamic system settings instance. For more information, see [Creating a new dynamic system settings instance for Db2 on z/OS installations](#).
3. To open the **Import** wizard, click **Designer Studio > Application > Distribution > Import**.
4. Click **Choose File**, browse for the `\Rules\IIF_7.40.jar` file from your distribution media, and follow the wizard instructions.

To ensure that you import all components, do not select the **Enable advanced mode to provide more granular control over the import process** check box.

The wizard identifies differences between the database schema of your current system and the schema of Pega Foundation for Insurance 7.4.

5. Based on the review of the database policies and application permissions that are used by your Pega Platform installation ([Prerequisites](#)), perform the appropriate step:
 - Select the **Automatic** check box and complete the wizard.
 - Select **Manual** and complete the following steps:
 - a. Click **View/Download DDL SQL** to produce a text file containing Data Definition Language (DDL) statements for the needed changes.
 - b. Save the DDL file and deliver it to a database administrator to make the required changes.
Depending on your organization's policies, database administrators might need to review the DDL file to determine what changes will occur prior to applying the DDL to your database.
 - c. After the database administrator has applied the DDL, repeat the Import wizard steps.
If there are errors that you cannot resolve, post your questions to the [Pega Product Support Community](#).
6. Optional: For best performance and initial user experience, run the Static Assembler utility to pre-assemble the rules in the application.
 - a) Click **Designer Studio > System > Assembly > Static Assembler**.
 - b) In the **Application Name** field, select the application.
 - c) Click **Start Assembly**.
7. Apply any required Pega Foundation for Insurance and Product Builder for Insurance hotfixes. For the list of required hotfixes, see the [Pega Foundation for Insurance Hotfix page](#).

Importing Pega Foundation for Insurance sample application and operators

The Pega Foundation for Insurance application provides some sample customer information data and operators that you can use to verify the installation.

1. Click **Designer Studio > Application > Distribution > Import**.
2. Click **Browse** and select the `\SampleData\IIF_Sample_740.jar` file to upload it from your distribution media.
3. After the file is uploaded, click **Next** to import the file.
4. Follow the on-screen instructions to upload and import the sample database files.

If this Pega Foundation for Insurance installation is part of a Pega Customer Service for Insurance installation, the Pega Customer Service for Insurance installation includes a script to appropriately update sample data on the server. Be sure to follow the sample data import instructions that are included in the *Pega Customer Service for Insurance Installation Guide*.

Enabling sample operator accounts

To use the sample application that you installed, enable the sample operator accounts that are included with the sample data.

For additional information about enabling operator accounts, see [Enabling operators](#).

1. Click **Designer Studio > Org & Security > Authentication > Operator access**.
2. In the **Disabled operators** section, click the link for the sample operator that you want to enable.

3. On the **Edit Operator ID** page, on the **Security** tab, ensure that the **Force password change on next login** check box is selected and clear the **Disable Operator** check box.
4. Select **Update password**.
5. In the **Change Operator ID Password** window, enter a password that conforms to your site standards and click **Submit**.
6. Click **Save** and then close the page.
7. On the **Organization and Security: Operator access** page, repeat steps 2 through 6 for each sample operator that you want to enable.

Creating a new dynamic system settings instance for Db2 on z/OS installations

This step is required only if you are installing Pega Foundation for Insurance on a Db2 for z/OS database.

1. Log in to Designer Studio.
2. From the Explorer panel, click **App** to open the Application Explorer.
3. In the Application Explorer menu, click **Create > SysAdmin > Dynamic System Settings**.
4. Enter the value for **Short Description**. For example, `Zos dbname`.
5. In the **Owning Ruleset** field, enter `Pega-Engine`.
6. In the **Setting Purpose** field, enter `prconfig/database/databases/PegaDATA/db2zos/dbname`.
7. Click **Create and open**.
8. In the **Value** field, enter the database name. For example, `FCP03`.
9. Click **Save**.

Configuring an email account

You must customize the default **Email Account** rule by copying it to the class **PegaIns-Work** and modifying the settings on the rule form to identify your site's email server.



Note: Flows using correspondence rules will fail if you do not customize the account settings to use your site's email server.

1. Log in to the sample application as the `PBIVerificationSysAdmin` sample operator ID.
2. From the **Designer Studio** menu select **Integration > Email > Email Accounts**.
3. Open the **Default** email account from the list.
4. Update the From and Host (SMTP) fields on the **Edit Email Account** rule form. Set the values according to your site. For more information, see [Email Account form](#).
5. When prompted, enter an appropriate password.
6. After saving the rule, check the connection status.

Verifying the installation of rulesets

Perform the following procedures to ensure that the installation correctly placed the required application rulesets.

- [Verifying the installation of Pega Foundation for Insurance rulesets](#)
- [Verifying the installation of Product Builder for Insurance rulesets](#)

Verifying the installation of Pega Foundation for Insurance rulesets

Perform this procedure to ensure that the installation correctly placed the required Pega Foundation for Insurance application rulesets.

1. Log in to the sample application using the **IIFSysAdmin** sample operator ID.
To enable this operator ID, see [Enabling sample operator accounts](#). Use the password you set when you enabled the operator.
2. In **Designer Studio**, click **Application > Structure > RuleSet Stack**.
3. Verify that the following ruleset versions are listed.
 - PegalInsurance:07.40
 - IIFAPI:07-40-05
 - PegalInsureAppGuide:07-40-05
 - ComponentSearch:07-40-05
 - RadarChart:07-40-05
 - PegalInsure-Int:07-40-05
 - PegalIns-Product:07-40-05
 - PegalInsure:07-40-05
 - Piif:07-40-05
 - IIFUI:07-40-05
 - Built on Application(s)
 - PegalInsurancePrerequisites:07.40
 - UI-Kit-7:11-01-01
 - PegaSP:07-11-99
 - PegaApp:07-21-99
 - PegaRULES:07.10
4. If your system does not contain the latest rulesets, it indicates that the installation procedure was not completed successfully.
 - a) Use the [Log files tool](#) to review any errors or warnings that occurred.
 - b) If applicable, take appropriate action to correct any existing system conditions that prevented a successful installation.
 - c) After you correct the conditions, import the JAR files again and then verify the rulesets.

- d) If you cannot correct the conditions that cause the error, restore your system from the backup and see if this corrects the condition.
- e) If you are unable to resolve the situation, go to [My Support Portal](#) to request appropriate assistance.

Verifying the installation of Product Builder for Insurance rulesets

Perform this procedure to ensure that the installation correctly placed the required Product Builder for Insurance application rulesets.

1. Log in to the sample application using the **PBVerificationSysAdmin** sample operator ID.
To enable this operator ID, see [Enabling sample operator accounts](#). Use the password you set when you enabled the operator.
2. In **Designer Studio**, click **Application > Structure > RuleSet Stack**.
3. Verify that the following ruleset versions are listed.
 - PegalnsProduct:07.40
 - PegalnsProductAppGuide:07-40-05
 - ComponentSearch:07-40-05
 - Pegalns-PBFW:07-40-05
 - Pegalns-Product:07-40-05
 - Built on Application(s)
 - PegaInsurance:07.40
 - PegaInsurancePrerequisites:07.40
 - PegaRULES:07.10
4. If your system does not contain the latest rulesets, it indicates that the installation procedure was not completed successfully.
 - a) Use the [Log files tool](#) to review any errors or warnings that occurred.
 - b) If applicable, take appropriate action to correct any existing system conditions that prevented a successful installation.
 - c) After you correct the conditions, import the JAR files again and then verify the rulesets.
 - d) If you cannot correct the conditions that cause the error, restore your system from the backup and see if this corrects the condition.
 - e) If you are unable to resolve the situation, go to [My Support Portal](#) to request appropriate assistance.