

**Pega Underwriting for Insurance  
Installation Guide  
7.4**



---

©2018 Pegasystems Inc., Cambridge, MA

All rights reserved.

## Trademarks

For Pegasystems Inc. trademarks and registered trademarks, all rights reserved. All other trademarks or service marks are property of their respective holders.

For information about the third-party software that is delivered with the product, refer to the third-party license file on your installation media that is specific to your release.

## Notices

This publication describes and/or represents products and services of Pegasystems Inc. It may contain trade secrets and proprietary information that are protected by various federal, state, and international laws, and distributed under licenses restricting their use, copying, modification, distribution, or transmittal in any form without prior written authorization of Pegasystems Inc.

This publication is current as of the date of publication only. Changes to the publication may be made from time to time at the discretion of Pegasystems Inc. This publication remains the property of Pegasystems Inc. and must be returned to it upon request. This publication does not imply any commitment to offer or deliver the products or services described herein.

This publication may include references to Pegasystems Inc. product features that have not been licensed by you or your company. If you have questions about whether a particular capability is included in your installation, please consult your Pegasystems Inc. services consultant.

Although Pegasystems Inc. strives for accuracy in its publications, any publication may contain inaccuracies or typographical errors, as well as technical inaccuracies. Pegasystems Inc. shall not be liable for technical or editorial errors or omissions contained herein. Pegasystems Inc. may make improvements and/or changes to the publication at any time without notice.

Any references in this publication to non-Pegasystems websites are provided for convenience only and do not serve as an endorsement of these websites. The materials at these websites are not part of the material for Pegasystems products, and use of those websites is at your own risk.

Information concerning non-Pegasystems products was obtained from the suppliers of those products, their publications, or other publicly available sources. Address questions about non-Pegasystems products to the suppliers of those products.

This publication may contain examples used in daily business operations that include the names of people, companies, products, and other third-party publications. Such examples are fictitious and any similarity to the names or other data used by an actual business enterprise or individual is coincidental.

This document is the property of:

Pegasystems Inc.

One Rogers Street

Cambridge, MA 02142-1209

USA

Phone: 617-374-9600

Fax: 617-374-9620

[www.pega.com](http://www.pega.com)

Document: Pega Underwriting 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](mailto:AppDocBug@pega.com).

# Contents

<b>Prerequisites.....</b>	<b>5</b>
<b>Backing up your system.....</b>	<b>6</b>
<b>Installing the application.....</b>	<b>7</b>
Importing the application bundle.....	7
Importing Pega Underwriting for Insurance sample application and operators.....	8
Sample data.....	8
Enabling sample operator accounts.....	8
Enabling the indexed search function.....	9
Integrating with Google Maps.....	9
<b>Verifying the installation of rulesets.....</b>	<b>10</b>
Verifying the installation of Pega Underwriting for Insurance rulesets.....	10
Verifying the installation of Pega Underwriting for Commercial Insurance rulesets.....	11
Verify the installation of Pega Underwriting for Multinational Insurance rulesets.....	12
Verifying the installation of Pega Underwriting for Group Benefits rulesets.....	12
Verifying the installation of Pega Underwriting for Personal Insurance rulesets.....	13
Verifying the installation of Pega Underwriting for Individual Insurance rulesets.....	14
<b>Testing the installation of the application and sample data.....</b>	<b>15</b>
Testing the Pega Underwriting for Commercial Insurance installation.....	15
Testing the Pega Underwriting for Multinational Insurance installation.....	16
Testing the Pega Underwriting for Group Benefits installation.....	17
Testing the Pega Underwriting for Personal Insurance installation.....	18
Testing the Pega Underwriting for Individual Insurance installation.....	21

# Prerequisites

Before you install the 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 7.4 or later, 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 Underwriting for Insurance application installation. For a list of required hotfixes for Pega Platform, see the .
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. Install and verify Pega Foundation for Insurance 7.4. For information, see the *Pega Foundation for Insurance 7.4 Installation Guide* on the [Pega Foundation for Insurance product page](#).
6. Apply any required hotfixes to the Pega Foundation for Insurance application before proceeding with the Pega Underwriting for Insurance installation. For a list of required hotfixes, see the [Pega Foundation for Insurance Hotfixes page](#).

# 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. [Importing the application bundle](#)
2. [Importing Pega Underwriting for Insurance sample application and operators](#)
3. [Enabling sample operator accounts](#)
4. [Enabling the indexed search function](#)
5. [Integrating with Google Maps](#)

## Importing the application bundle

The system data and rulesets for Pega Underwriting 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. To open the **Import** wizard, click **Designer Studio > > Application > Distribution > Import**.
3. Click **Choose File**, browse for the `\Rules\PUI_74.jar` file on 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 Underwriting for Insurance 7.4.
4. 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](#).
5. 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**.
6. Apply any required hotfixes. For the list of required Pega Underwriting for Insurance hotfixes, see the .

## Importing Pega Underwriting for Insurance sample application and operators

The Pega Underwriting 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\PUI_SampleData_74.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 Underwriting 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*.

### Sample data

Pega Underwriting for Insurance uses the Pega Foundation for Insurance sample data that you installed and used to verify the Pega Foundation for Insurance installation. If you install multiple Insurance application bundles on the same server, there's no need to manually install sample data from the Pega Foundation for Insurance application.



**Note:** If you have installed or will install Pega Customer Service for Insurance on this server, note the following:

- The Pega Customer Service for Insurance installation process handles the use of sample data appropriately. See the *Pega Customer Service for Insurance 7.4 Installation Guide* on the [Pega Customer Service for Insurance product page](#) for details about importing the sample data.
- If you are installing Pega Underwriting for Insurance on a server with Pega Customer Service for Insurance already installed, do not install sample data because it can cause data duplication.

## 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, 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, select the **Force password change on next login** check box 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.



## Enabling the indexed search function

To facilitate data retrieval in searches, you can enable the indexed search function for the application.

1. In Designer Studio, click **Designer Studio > System > Settings > Search** to open the System: ;Settings landing page.
2. On the **Search** tab, select the following options:
  - **Enable Indexing**
  - **All Rules**
  - **All Data**
  - **All Work**
3. If Pega Platform 7.4 is installed in multiple nodes and controlled via a load balancer program, click **Search index host node ID** to expand the section and ensure that each host node ID is configured properly.
4. Click **Submit**.

## Integrating with Google Maps

The Pega Underwriting for Insurance application can integrate with Google Maps to display the position of commercial lines and group underwriting insurance quotes.

In the Pega Underwriting for Insurance mobile application, you can view quotes within a certain radius of your current location. For example, if you are visiting a client, you can see the list of quotes within a five mile radius from the client's office. To enable this integration, you must configure the application to use a Google Maps API key.

To learn how to obtain a Google Maps API key, set the Google API key dynamic system setting, and configure the Address Map control for this installation of Pega Underwriting for Insurance, see [Using the Address Map control](#).

# 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 Underwriting for Insurance rulesets](#)
- [Verifying the installation of Pega Underwriting for Commercial Insurance rulesets](#)
- [Verify the installation of Pega Underwriting for Multinational Insurance rulesets](#)
- [Verifying the installation of Pega Underwriting for Group Benefits rulesets](#)
- [Verifying the installation of Pega Underwriting for Personal Insurance rulesets](#)
- [Verifying the installation of Pega Underwriting for Individual Insurance rulesets](#)

If your system does not contain the latest rulesets, it indicates that the installation procedure was not completed successfully.

1. Use the [Log files tool](#) to review any errors or warnings that occurred.
2. If applicable, take appropriate action to correct any existing system conditions that prevented a successful installation .
3. After you correct the conditions, import the JAR files again and then verify the rulesets.
4. If you cannot correct the conditions that cause the error, restore your system from the backup and see if this corrects the condition.
5. If you are unable to resolve the situation, go to [My Support Portal](#) to request appropriate assistance.

## Verifying the installation of Pega Underwriting for Insurance rulesets

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

1. Log in to the sample application using the **PABSysadmin** 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.
  - PegalInsuranceNBB:07.4
    - PegalInsureNBBAppGuide:07-31-99
    - PUI-Artifacts:07-31-11
    - PegalInsureNBB:07-31-99
    - PegalInsureRulesEngine:07-31-99
    - PUIUI:07-31-99
  - Built on Applications(s)
    - PegalInsurance:07.4
    - PegalInsurancePrerequisites:07.4

- ISO\_20180228T122438626:01.01.01
- PegaRULES:07.10

4. Log out.

## Verifying the installation of Pega Underwriting for Commercial Insurance rulesets

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

1. Log in to the sample application using the **CLVerificationSysadmin** 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.
  - PegalnsurePACLVerify:07.4
    - PUIAUT:01-01
    - PUIDnBData:07-31-05
    - PegalnsurePACLReports:07-31-01
    - PegalnsurePACLDelegation:07-31-01
    - PBISampleData:07-31-10
    - PegalnsurePACLVerify:07-31-11
    - PBMap:07-31-05
  - Built on Application(s)
    - PegalnsurancePACL:07.4
      - PegalnsurePACLAppGuide:07-31-05
      - PegalnsurePACL:07-31-18
      - PegalnsurePAPC:07-31-05
      - PUICL-ISO-Int:07-31
      - PUICL-Artifacts:07-31-11
    - PegalnsuranceNBB:07.4
    - Pegalnsurance:07.4
    - PegalnsurancePrerequisites:07.4
    - PUI3rdPartyAPI:07.44
    - DnB\_20170214T183624301:01.01.01
    - PitneyBowes\_20170427T203930111:01.01.01
    - AppUtilities:07.4
    - KMForPUI\_20170621T060541782:07.4
    - PegaRULES:07.10

4. Log out.

## Verify the installation of Pega Underwriting for Multinational Insurance rulesets

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

1. Log in to the sample application using the **MNVerificationSysadmins** 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.
  - PegalnsurePACLMNVerification:07.4
    - PegalnsurePACLMNDelegation:07-31-01
    - PUIDnBData:07-31-05
    - PegalnsurePACLMNVerify:07-31-11
    - PBISampleData:07-31-10
    - IIFAUT:01-01
  - Built on Application(s)
    - PegalnsurePACLMN:07.4
      - PegalnsurePACLMN:07.31-15
    - PegalnsurancePACL:07.4
    - PegalnsuranceNBB:07.4
    - Pegalnsurance:07.4
    - PegalnsurancePrerequisites:7.4
    - AppUtilities:07.4
    - KMForPUI\_20170621T060541782:07.4
    - PegaRULES:07.10

4. Log out.

## Verifying the installation of Pega Underwriting for Group Benefits rulesets

Perform this procedure to ensure that the installation correctly placed the required Pega Underwriting for Group Benefits application rulesets.

1. Log in to the sample application using the **GRPVerificationSysadmin** 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.

- PegalInsuranceGroupVerification:07.4
  - PegalInsureGRPVerify:07-31-11
  - PBISampleData:07-31-10
  - PegalInsureGrpReports:07-31-01
  - GRPAUT:01-01
- Built on Application(s)
  - PegalInsuranceGroup:07.4
    - PegalInsureGrpAppGuide:07-31-01
    - PegalInsureGrp:07-31-16
  - PegalInsuranceNBB:07.4
  - PegalInsurance:07.4
  - PegalInsurancePrerequisites:07.4
  - ISO\_20180228T122438626:01-01-01
  - AppUtilities:07.4
  - KMForPUI\_20170621T060541782:07.4
  - PegaRULES:07.10

4. Log out.

## Verifying the installation of Pega Underwriting for Personal Insurance rulesets

Verifying the installation of Pega Underwriting for Commercial Insurance rulesets

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

1. Log in to the sample application using the **PLVerificationSysadmins** 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.

- PegalInsurancePAPLVerify:07.4
  - PLAUT:07-31
  - PegalInsurePAPLVerify:07-31-11
  - PBISampleData:07-31-10
  - PegalInsurePAPLReports:07-31-01
- Built on Application(s)
  - PegalInsurancePAPL:07.4
    - PegalInsurePAPLAppGuide:07-31-99

- PegalnsurePAPL:07-31-17
- PegalnsurePAPC:07-31-05
- PegalnsuranceNBB:07.4
- Pegalnsurance:07.4
- PegalnsurancePrerequisites:07.4
- ISO\_20180228T122438626:01-01-01
- AppUtilities:07.4
- KMForPUI\_20170621T060541782:07.4
- PegaRULES:07.10

4. Log out.

## Verifying the installation of Pega Underwriting for Individual Insurance rulesets

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

1. Log in to the sample application using the **ILAVerificationSysadmin** 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.
  - PegalnsuranceILAVerify:07.4
    - PegalnsureILAVerify:07-31-11
    - PegalnsureILADElegation:07-312-01
    - PBISampleData:07-31-10
  - Built on Application(s)
    - PegalnsuranceILA:07.4
      - ILABase:07-31-99
      - PegalnsureILA:07-31-18
      - PegalnsureILAAppGuide:07-31-99
    - PegalnsuranceNBB:07.4
    - Pegalnsurance:07.4
    - PegalnsurancePrerequisites:07.4
    - ISO\_20180228T122438626:01-01-01
    - AppUtilities:07.4
    - KMForPUI\_20170621T060541782:07.4
    - PegaRULES:07.10
4. Log out.

# Testing the installation of the application and sample data

Follow the test case steps for your application to verify that the application and sample data were installed correctly.

- [Testing the Pega Underwriting for Commercial Insurance installation](#)
- [Testing the Pega Underwriting for Multinational Insurance installation](#)
- [Testing the Pega Underwriting for Group Benefits installation](#)
- [Testing the Pega Underwriting for Personal Insurance installation](#)
- [Testing the Pega Underwriting for Individual Insurance installation](#)

If you are unable to complete the sample flows, follow these steps:

1. Use the [Log Files tool](#) to review any errors or warnings that occurred.
2. If applicable, take appropriate action to correct any existing system conditions that prevented a successful installation.
3. After you correct the conditions, import the sample data again and then perform the verification tasks. If you are unable to resolve the situation, go to [My Support Portal](#) to request appropriate assistance.

## Testing the Pega Underwriting for Commercial Insurance installation

Follow the test case steps below to verify that the Pega Underwriting for Commercial Insurance application and sample data were installed correctly.

1. Log in to the sample application using the **CLVerificationSysadmin** 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 **Launch > Underwriter**.
3. In the Underwriting portal, click **New > Start commercial property submission** to initiate a commercial property submission.
4. On the **Customer intake** screen, complete the following steps.
  - a) In the **Agent details** section, select values in the **Agency** and **Producer** fields.
  - b) In the **Search for customer** section, enter `Buten Bearings` in the **Business name** field.
  - c) Click **Find**.
5. Select the customer from the search results and click **Submit**.
6. Verify that the **Eligibility questions** screen is displayed.

Eligibility questions		CA CL Verification Admin-
<b>SIC code</b>	<b>Description</b>	
Enter SIC code <input type="text"/>	SIC ---- - ---- NAICS ---- - ----	
What type of organization is the company? *		
<input type="text" value="Select"/>		
What is the annual revenue of the company? *		
<input type="text"/>		
What is the total number of full and part time employees in the company? *		
<input type="text"/>		
Does the company conduct business off premises such as contracting, installation or service, outside normal sales activities? *		
<input type="radio"/> Yes		
<input type="radio"/> No		
Are any foreign products sold or distributed? *		
<input type="radio"/> Yes		
<input type="radio"/> No		

## Testing the Pega Underwriting for Multinational Insurance installation

Follow the test case steps below to verify that the Pega Underwriting for Multinational Insurance application and sample data were installed correctly.

1. Log in to the sample application using the **MNVerificationSysadmin** sample operator ID.
2. In Designer Studio, click **Launch > Underwriter** to initiate a multinational property submission.  
To enable this operator ID, see [Enabling sample operator accounts](#). Use the password you set when you enabled the operator.
3. In the Underwriting portal, click **New > Start Multinational commercial property submission**.
4. On the **Customer intake** screen, complete the following steps.
  - a) In the **Agent details** section, select values in the **Agency** and **Producer** fields.
  - b) In the **Search for customer** section, enter `Buten Bearings` in the **Business name** field.
  - c) Click **Find**.
5. Select the customer from the search results and click **Submit**.
6. Verify that the **Initial risk determination** screen is displayed.



Initial risk determination	
Determine risk based on industry code	
MA MN Verification Admin.	
SIC code	Description
<input type="text" value="Enter SIC code"/>	SIC --- - --- NAICS --- - ---

## Testing the Pega Underwriting for Group Benefits installation

Follow the test case steps below to verify that the Pega Underwriting for Group Benefits application and sample data were installed correctly.

1. Log in to the sample application using the **GRPVerificationSysadmin** 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 **Launch > Group Operator** to initiate a group plan submission.
3. In the Group Operator portal, click **New > Start Group Plan Submission**.
4. On the **Customer intake** screen, complete the following steps.
  - a) In the **Agent details** section, select values in the **Agency** and **Producer** fields.
  - b) In the **Search for customer** section, enter `Buten Bearings` in the **Business name** field.
  - c) Click **Find**.
5. Select the customer from the search results and click **Submit**.
6. Verify that the **Capture customer profile data** screen is displayed.

### Capture customer profile data

Collect customer details

GA GRP Verification Admin-QA

---

Type of business \*

New business ▼

Nature of business operations

Effective date requested \*

Anniversary month \*

01 (January) ▼

Day of the month \*

01 ▼

Proposal due date \*

Rate guarantee period \*

1 year ▼

Years at location

Number of eligible lives \*

Situs \*

Select ▼

#### Group contact

First name

Last name

Use account address

Phone number

Email address

## Testing the Pega Underwriting for Personal Insurance installation

Follow the test case steps below to verify that the Pega Underwriting for Personal Insurance application and sample data were installed correctly.

1. Log in to the sample application using the **PLVerificationSysadmin** 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 **Launch > Case Manager 7**.
3. In the Case Manager portal, click **New > Create Personal Auto Submission** to initiate a personal auto submission.
4. On the **Customer Intake** screen, complete the following steps.
  - a. In the **Agent details** section, select values in the **Agency** and **Producer** fields.

- b. In the **Search for customer** section, enter `Natalie` in the **First name** field and `Song` in the **Last name** field .
  - c. Click **Find**.
5. Select the customer from the search results and click **Submit**.
  6. Verify that the **Vehicles** screen is displayed.

1. Vehicles    2. Drivers    3. Quote

Include all vehicles you want to cover as part of your policy.

[1999 TOYOTA COROLLA](#)    [Add new](#)

**Vehicle**

Year\*    Make\*    Model\*

1999    TOYOTA    COROLLA

**Garaging location**

Address line 1\*  
PO Box 9279

Address line 2

City\*  
Boston

State/ province/ region\*  
MA

Zip/ postal code\*  
02118

Country\*  
UNITED STATES

## Testing the Pega Underwriting for Individual Insurance installation

Follow the test case steps below to verify that the Pega Underwriting for Individual Insurance application and sample data were installed correctly.

1. Log in to the sample application using the **ILAVerificationSysadmins** 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 **Launch > New Business Case Manager** to initiate an individual life submission.
3. In the New Business Case Manager portal, click **New > Application**.
4. On the **Initial Information** screen, complete the following steps.
  - a) In the **Agent** section, select an **Agency** and a corresponding **Agent**.
  - b) In the **Agent** section, click the **Received agent agreement signature** check box.
  - c) In the **Applicant(s)** section, enter `Natalie` in the **First name** field and `Song` in the **Last name** field.
  - d) Click **Submit**.
5. Verify that the **Insured** screen is displayed.

**Natalie Song**

Title

Select ▼

First name\*

Natalie

Middle name

Last name\*

Song

Gender

Male

Female

Date of birth

M/d/yyyy 

Address

City

State

Select ▼

Zip code

Phone number

Email

Social security number

Drivers license number

Licensing state

State... ▼

License expiration date



US citizen

Yes

No

Personal

Insured

Beneficiary

> Coverage

> Medical

Authorization

Payment