

Cora Underwriting Manager Deployment

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To deploy the Cora Underwriting Manager, download the release package [here](#), and then install the package.

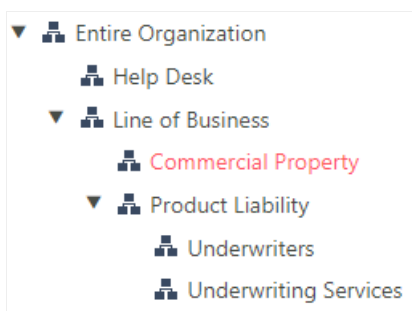
Prerequisite

Make sure you have Cora SeSequence V10.1 installed.

Install Procedure

Manual Preparations

1. Log in to Cora SeSequence Administration as an Admin user.
2. Click **Manage Organization>Edit Organization**.
3. Right-click **Entire Organization**, and create Help Desk group.
 - a. Add LoB group, *Underwriters*.



4. Copy and unzip *Underwriting Manager V2.1.zip* into the folder *C:\TEMP* on the Administration servers.
5. Go to Cora SeSequence Administration, right-click **Solutions**, and then select **Import solution**.
 - a. Import *UWM-1.0.zip* from the Solution folder with all the default settings. In the Plan Allocation Resource stage, leave **Target** blank.
6. Click **Employees**.
 - a. Click **Add Employee**, and add the user that runs the JES services. Usually, the domain is NT Authority, and the username is System.
 - b. Populate the tables:
 - Originating Emails
 - Addresses
 - Contact Details
 - Producers
 - Brokers
 - Underwriters
 - Underwriter per Broker

Configure Custom Resources

Log onto a server where the Administration site is installed. Edit the PS file in the first lines based on your installation configuration, and run the script *0_Custom_Resources.ps1* in PowerShell ISE with Run As Administrator.

NOTE

If any unhandled errors pop up, please consult your UWM Application Support Team.

Import UWM Processes

- In the same ISE instance you ran "0_Custom_Resources.ps1", edit the target database name at the beginning of the file and run 1_MultiWorkflowsDeploymentApp.ps1
- Restart all the Cora SeQUENCE services:
 - ADSS
 - BRS
 - JES

NOTE

If you have "Timeout" error during the workflows deployment, you need to increase the machine timeout by doing the following:

1. Locate the machine.config, open PowerShell ISE as administrator, and run `[System.Runtime.InteropServices]::SystemConfigurationFile`.
2. Go to the location and edit with notepad++ the machine.config.
3. Below `</configsections>` paste the following:

```
<system.transactions>  
<machineSettings maxTimeout="02:00:00"/>  
</system.transactions>
```

Manually modify the Message Bus Queues and Activities

- Copy the UWM Handover To Asynchronous Execution and UWM Handover Listener, and modify the Message Bus endpoints in the consumer and listener to your own.
- After message bus modification, update the lookup table **UWM Workbench>UWM Customized WFs References>UWM Handover to Asynchronous Execution** to point to your newly copied and modified workflow.

Modifications on Cora SeQUENCE Administration site

1. Go to Cora SeQUENCE **Administration>Global Settings>Applications Variables**, edit the Applications Variables to match your environment:
 - a. HelpdeskGroupID: Change to the ID in your environment
 - b. Sharepoint.URL: Change to your SP URL
 - c. EAASSubscriptionKey: Your key to EaaS service

Manually copy and modify the Email Listener workflow

See [this article](#).

Manually verify copy of the ACORD Helper.dll

Check the relevant locations to verify that the ACORDHelper.dll file exists. If the file doesn't exist then copy it from the `~\Underwriting Manager\App_Gac\App_Gac` folder.

In the Jobs Management table, manually add the Email sender and manually start the Email listener.

Analytics Installation

Download the Analytics package [here](#), and then install.

Prerequisites

- Create a reporting DB (on the same SQL Server).
- Download and unzip *UWM Analytics V2_1.zip*.
- Add connection string to the Cora SeSequence Administration.
 1. Go to **Administration>Global Settings>Connection String**.
 2. Click **Add New Record**, and then add the details:
 - a. Name: UWM Reporting DB
 - b. Provider: Microsoft.Data.SqlClient
 - c. Create the connection string in this structure and then test the connection for success:
Add SSPI:

```
Data Source=<SQL Server>;Initial Catalog=<DB Name>;Integrated Security=SSPI
```

Username & Password:

```
Data Source=<SQL Server>;Initial Catalog=<DB Name>;User
```

```
ID=<DB userName>;Password=<DB password>;
```

Make sure to use the new Reporting DB name.

NOTE

This connection string will be used to invoke queries. We highly recommend to use high-availability, and create read-only DB for running queries.

Set up the Reporting DB

On the reporting DB:

1. Run the `UWM Reporting DB.sql`.
Verify that the script is run successfully with no errors or warnings, and the DB objects like Tables, SPs and Views have been created.
2. Run the following one-time Full Load command:

```
EXEC [dbo].[USP_ReportingDB_ETL] @DB_Name = '[ SequenceDBName]', @FullLoad = 1 (change the SequenceDBName)
```
3. Create new job.
 - a. Job name: Underwriting Manager Reporting DB <Environment Name> - Run ETL
For example, Underwriting Manager Reporting DB STGR2 - Run ETL
 - b. Job owner: Admin user
 - c. Job category: can be Data Collector
 - d. Command: `EXEC [dbo].[USP_ReportingDB_ETL] @DB_Name = '[SequenceDBName]', @FullLoad = 0`
 - e. Interval: every 5min
4. Monitor the job and make sure it is running with no errors, and tables are loaded correctly.

Deploy the Dashboards

1. In Cora SeSequence Administration, go to **Administration>Analytics>Dashboard Suite**.
2. Click **Import Dashboard Suite**.
 - a. Import all the packages from the Dashboards folder. (Clear system tables > tblCredentials).
3. Grant relevant permissions.

NOTE

The dashboards work only with Reporting DB.

Deploy Microsoft Power BI objects

If you have a Microsoft Power BI of your own then import the *Underwriting Manager.pbix* file from the Power BI folder to your Power BI.