



# Aurea<sup>®</sup> Insurance Process Management Installation Guide



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# Notices

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For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)

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# Preface

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For details, see the following topics:

- [About this documentation](#)
- [Obtaining support](#)
- [Conventions Used in this Manual](#)

## About this documentation

This guide is part of the documentation set for Aurea<sup>®</sup> Insurance Process Management.

## Obtaining support

If the product documentation does not provide a solution to your specific issue, or if you need clarification on the issue, then contact our Product Support team. You can contact the team through the Internet, telephone, or postal mail, as per the details provided in the table below.

**Table 1: Product Support Contact Information**

To contact by	Use
Web site	<a href="http://www.aurea.com/support">http://www.aurea.com/support</a> If you are an existing customer, then you can log in to the above site for product support. If you are a first time user, then you need to create an account first.
E-mail	<a href="mailto:support@aurea.com">support@aurea.com</a>

To contact by	Use
Telephone	+1-650-801-1899 for worldwide support.
Postal Address	Aurea, Inc. 401 Congress Ave Suite 2650 Austin, TX 78701, USA.

To enable us to quickly answer your questions, please provide the following information:

- Your name, installation site address and the license key for Business Manager software.
- Your Business Manager version and build number.
- Your operating system, application server and browser, with version and service pack details, if any.
- Your database management system and version, and information on JVM and JDBC used.

## Conventions Used in this Manual

This document uses the following conventions and terminology notations to distinguish elements of text:

**Table 2: Conventions used in this Manual**

Convention (styles and terms)	Purpose
<b>bold</b>	Indicates titles of command buttons, checkboxes, options, lists, dialog boxes and portal page names.
<i>italic</i>	Indicates book titles.
monospace	Represents folder paths, file names, code segments, or examples.
backward slash (\)	Indicates the path in a Windows <sup>®</sup> environment. For UNIX <sup>®</sup> , a forward slash is used.
SBM_Home	Represents the installed folder of Aurea <sup>®</sup> CX Process Business Manager <sup>®</sup> that contains essential components and files. The default location is C:\Aurea\CXProcess\SBM2017.
SBM_DOMAIN	Refers to the absolute path to the Business Manager web application running on the application server. This path differs according to the application server used (Example, for Pramati, C:\Aurea\CXProcess\SBM2017\webapps\deploy\sbm.
Studio_Home	Represents the installed folder of Aurea <sup>®</sup> CX Process BPM Studio <sup>™</sup> that contains essential components and files. The default location is C:\Aurea\CXProcess\BPMStudio2017.
Workspace_Home	Represent the Workspace folder of Aurea <sup>®</sup> CX Process BPM Studio. The default location is Studio_Home\workspace.

<sup>1</sup> For support telephone numbers and offices in your region, visit the support web site above. This contact information is for customer support only.



# Installing Aurea<sup>®</sup> Insurance Process Management

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This chapter describes how to install, implement auto deployment, and uninstall Aurea<sup>®</sup> Insurance Process Management.

For details, see the following topics:

- [Prerequisites for Aurea® Insurance Process Management](#)
- [Installing Aurea® Insurance Process Management on Windows](#)
- [Supported functionality](#)
- [After Installing IPM](#)
- [Auto Deployment](#)
- [After Auto Deployment](#)
- [Enabling IPM as a tab in DCM](#)
- [Setting up LDAP for IPM](#)
- [Prerequisites for uninstalling Aurea® Insurance Process Management](#)
- [Uninstalling Aurea® Insurance Process Management](#)

## Prerequisites for Aurea® Insurance Process Management

Before installing Aurea® Insurance Process Management, verify that the following prerequisite software products have been installed correctly.

- Aurea® CX Process Business Manager® 2017 (herewith referred to as Business Manager)
- Aurea® CX Process BPM Studio™ 2017 (herewith referred to as BPM Studio)

## Hardware requirements

The following table lists the minimum and recommended hardware requirements for installing and running Aurea® Insurance Process Management:

**Table 3: Hardware Requirements**

Equipment	Minimum	Recommended
Processor	<ul style="list-style-type: none"> <li>• Pentium IV 1GHz</li> <li>• UltraSPARC-III 900 MHz (server install only)</li> </ul>	<ul style="list-style-type: none"> <li>• Dual CPU Pentium IV 1GHz &amp; up</li> <li>• Dual CPU UltraSPARC-III 900 MHz and up (server install only)</li> </ul>
Memory	2 GB RAM	2 GB RAM
Free disk space	2GB	2 GB and above. Depending on the application server you are using, you may need additional free disk space.

Equipment	Minimum	Recommended
Operating system for CX Process Business Manager	Microsoft <sup>®</sup> Windows <sup>®</sup> Server 2008 Standard/Enterprise R2, x86 64 based platforms  Microsoft Windows 7 / Windows 8 Professional/Enterprise on Intel based platforms ( x86 64)	N/A
Operating system for BPM Studio	<ul style="list-style-type: none"> <li>• MS Windows 7 Prof (64-bit)</li> <li>• MS Windows 8 Prof (64-bit)</li> </ul>	N/A

## Supported Platforms

The following table lists the software platforms supported by Aurea<sup>®</sup> Insurance Process Management.

**Table 4: Supported platforms**

Category	Software
Operating system	Windows <sup>®</sup> Server 2008
Application server	JBoss <sup>®</sup> EAP 5.2 WebSphere 8.5.5.1
Database	Oracle <sup>®</sup> 11g r2 with Oracle <sup>®</sup> JDBC Driver
JDK	Oracle <sup>®</sup> JDK 1.7.0_55
Browser	MS Internet Explorer (IE) 9.0/10/11 (64 bit) (Requires Java plugin 1.7.0.55; Supported on Windows only; Needs to disable MS JVM)
Open Office	3.4.1 and 4.1.2  <b>Note:</b> Open Office should be installed on the same machine as that of CX Process Business Manager.
DCM	2015, 2016.1, 2017 and 2017.1.

**Note:** For a complete listing of platforms supported by Aurea<sup>®</sup> CX Process Business Manager<sup>®</sup> 2017, refer to the *Supported Platforms Guide*.

# Installing Aurea<sup>®</sup> Insurance Process Management on Windows

You can install Aurea<sup>®</sup> Insurance Process Management with the aid of an Installation wizard, where you can enter relevant data in a series of wizard pages that correctly install and configure Aurea<sup>®</sup> Insurance Process Management.

The Installation wizard also installs the business accelerator components on installing Aurea<sup>®</sup> Insurance Process Management. For information regarding business accelerators, see the *Aurea<sup>®</sup> Insurance Process Management User's Guide*.

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**Note:** Before you start the installation Wizard for installing Aurea<sup>®</sup> Insurance Process Management, ensure that all the servers are shut down.

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## To install Aurea<sup>®</sup> Insurance Process Management on Windows:

1. Extract the Installer ZIP file on your machine. From the extracted folder, run the `setupwin32.exe` file, which starts the Installer Wizard.
2. Review the contents of the Introduction page and click **Next** to continue with the installation.
3. Review the End User License Agreement page and click the “**I accept...**” option. Click **Next**.
4. From the Installation Location page, accept the default directory where you can install Aurea<sup>®</sup> Insurance Process Management, or enter a new directory, or click **Browse** to locate and specify another directory. You can also select any (or both) of the following options, then click **Next**.
  - **Server Deployment** to deploy Aurea<sup>®</sup> Insurance Process Management components on Business Manager servers. You must select this option if you want to use the runtime functionality of Aurea<sup>®</sup> Insurance Process Management. You must have Business Manager installed in order to use this functionality.
  - **BPM Studio Deployment** to configure BPM Studio for Aurea<sup>®</sup> Insurance Process Management. You must select this option in order to use the process models and artifacts (provided by Aurea<sup>®</sup> Insurance Process Management) in your BPM Studio environment. You must have BPM Studio installed in order to use this functionality.

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**Note:** You can select both the deployment types (recommended) only if Business Manager and BPM Studio are both installed on the same machine. If you select any one deployment type, ensure that you also install Aurea<sup>®</sup> Insurance Process Management (with the other deployment type selected) on the other machine in order to implement Aurea<sup>®</sup> Insurance Process Management.

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5. The **Business Manager Details** page displays only if you have selected the **Server Deployment** check box in the previous page. Click **Browse** to specify the directory location where Business Manager is installed. Click **Next**.
6. The **BPM Studio and Workspace Details** page displays only if you have selected the **BPM Studio Deployment** check box in the previous page. Specify the BPM Studio installation directory and the workspace directory where you want to store the Aurea<sup>®</sup> Insurance Process Management process templates. Click **Browse** to specify a different directory. Click **Next**.

7. The **Email Details** page enables you to configure your Mail Server. In the **Outgoing Email Server** box, specify the server name and domain name of your Email server. For example, mail.<company\_name>.com. In the **Administrator Email** box, specify the email address of the Business Manager administrator who receives email notifications, in case of any Exceptions or Revisions.
8. From the **BizLogic Admin Credentials** page, specify the user name and password to be used as the default administrator for Business Manager.
9. By default, all Aurea<sup>®</sup> Insurance Process Management shortcuts are stored in the Aurea Insurance Solution folder, under **Start > Programs > Aurea > IPM** . From the **Products Shortcuts** page, you can change the default program folder in which the shortcuts are kept.
10. Review the Aurea<sup>®</sup> Insurance Process Management installation settings in the **Pre-Installation Summary** page. Click **Install** to accept the settings and start the installation. Click **Back** to return to previous pages and make any needed changes. Click **Cancel** to end the Aurea<sup>®</sup> Insurance Process Management installation and exit the Installer wizard.
11. The Installation wizard executes the installation, while displaying the status of the installation. After the installation is completed, the Installer wizard displays a confirmation message. Click **Finish** to exit.

The Aurea<sup>®</sup> Insurance Process Management installer copies the following files and folders to the Business Manager and BPM Studio installation folders. For each existing file, the installer creates a backup file (saved as \*.ins.bak).

**Table 5: Copied Files / Folder**

File / Folder	Folder Location
links.xml, menu.xml	SBM_HOME\conf\Resources\bpmportal
include_menu_static.jspf, confirmation.jsp	SBM_DOMAIN\bpmportal\common
dash_view.jsp	SBM_DOMAIN\bpmportal\myhome
utilities.js	SBM_DOMAIN\bpmportal\javascript
web.xml, sbmwebservice.xml	SBM_DOMAIN\WEB-INF
xbean.jar, dataxtendsi.jar	SBM_DOMAIN\WEB-INF\lib
botypes folder	Studio_Home\workspace\.com.savvion.studio
sbm.utils_4x.js	SBM_DOMAIN\bpmportal\javascript\sbm

Before you can start using Aurea<sup>®</sup> Insurance Process Management, you must complete the instructions, described in [Auto Deployment](#) on page 16, on the Business Manager servers. To modify any of the Aurea<sup>®</sup> Insurance Process Management process models, you must import these projects into BPM Studio (as described in "Importing Projects into BPM Studio" section in *Aurea<sup>®</sup> Insurance Process Management User's Guide*) and then redeploy them on Business Manager servers.

## Supported functionality

The Aurea<sup>®</sup> Insurance Process Management includes the Solutions Foundation, along with the Add Appointment, Dispute Resolution, Hierarchy Transfer, On-Boarding, and Termination solutions.

Listed below are the applications that are installed:

- AddAppointment
- AdhocEmail
- AdhocEmailCR
- ApprovalProcess
- ARM
- ConfigureSolution
- ContactPointManager
- CustomDataManagerCR
- CustomDataUploader
- CustomDocDSCR
- DisputeResolution
- DisputeResolutionCR
- DisputeResolutionLMRules\_V1
- DRExceptionHandler
- DRQCCEvaluationRules\_V1
- DynamicTextGenerator
- ExamMonitor
- ExamMonitorCR
- GenericRESTAdapter
- GetDocuments
- HierarchyTransfer
- InsuranceErrorHandler
- InsuranceErrorHandlerCR
- InsuranceSolutionsCR
- IPIntegrationServicesCR
- LetterManager
- LetterManagerCR
- LicenseProcess
- LMAdmin
- NextTaskCR
- OnBoarding
- OnBoardingGetDocRules\_V1

- OnBoardingLMRules\_V1
- OnBoardingSelectAgreements\_V1
- ProducerOnBoardingAdmin
- ProducerOnBoardingAdminCR
- ReportCR
- ServiceCheckCR
- SolutionUtil
- Termination
- UserManagementAPI

## After Installing IPM

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**Important:** If you install Aurea® CX Process Business Manager® 2017 with database user password more than 15 characters, the database credential verification process using installer fails. To work around this, if your database user password is more than 15 characters, then you need to continue Aurea® CX Process Business Manager® 2017 installation process without database credential verification process using installer. Update the JDBC drivers as described in the procedure below.

---

After post installation steps for Aurea® CX Process Business Manager® 2017 is completed do not execute Prepare Repository. Perform the IPM installation process first and then perform the following steps.

1. The JDBC drivers are available in the following locations:

- **SBM:** `SBM_HOME\lib\jdbc\datadirect\lib`
- **Studio:**  
`STUDIO_HOME\eclipse\plugins\com.savvion.jdbc.oracle_10.0.0.201405232125\lib`

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**Note:** `SBM_HOME` is SBM installation root directory and `STUDIO_HOME` is BPM Studio installation root directory.

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2. Replace them with the JDBC driver in the following location:

- `SOLUTION_HOME\database\jdbc\datadirect\lib`

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**Note:** `SOLUTION_HOME` is solution installation root directory.

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3. Execute Prepare Repository.

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**Note:** Ensure that the Prepare Repository is completed successfully.

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4. Start all Aurea® CX Process Business Manager® 2017 servers.

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**Note:** Ensure that you are able to start all servers successfully and access the portal pages.

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After this, perform the steps provided in [Auto Deployment](#) on page 16.

## Auto Deployment

You can automatically deploy all types of solution projects (BizLogic, Web application, Common Resource, and BizRules) with a single command using the Auto Deployment utility.

The Auto Deployment utility provides the following benefits:

- It can be executed as a single step command line utility.
- It deploys all the projects packaged with the individual solution installer.
- It runs all the database schemas for the packaged projects.
- It eliminates the need to create sample users and groups for the applications.
- It supports the deployment of customized projects.

Prerequisites for Auto Deployment:

- Ensure that you have successfully installed the solution foundation using the Installation wizard. The Installation wizard, on completion, copies the Auto Deployment utility along with supporting components to the `SBM_Home\apppackager\Insurance_Solution` folder.
- Ensure that all the Business Manager servers (EJB, Portal, BizLogic and BizPulse) are started.

## Before Auto Deployment

Before completing auto deployment, update the `SBM_HOME\ant\ant.properties` file by adding the following property:

```
sbmUrl=http://$Host_Name:18793
```

Before running the Auto Deployment utility, you must update the `OnBoarding.conf` file in order to use the Insurance Data Exchange Accelerator (IDEA) package with the On-Boarding solution. You can access the `OnBoarding.conf` file from the

`AIS_Home\workspace\InsuranceSolutionsCR\sbm_home\conf` folder, where `AIS_Home` is the installation folder of Aurea® Insurance Process Management.

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**Note:** Although the name indicates that this file only applies to Onboarding, it is actually used for configurations of all workflows.

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You must configure the following properties:

**Table 6: Configuring OnBoarding.conf properties**

Property	Value
<code>dcm.db.url</code>	The URL to connect to the DCM database.
<code>dcm.db.user</code>	User name to be used to connect to the DCM database.



Property	Value
dcm.db.password	User password required to connect to the DCM database.
dcm.db.type	The type of the DCM database. For example, "DCMdbODatabase" for Oracle®.
dcm.db.schema	The database schema name used for DCM installation.
nipr.url	The URL to connect to the NIPR server.
big.url	The URL to connect to the BIG system.
<p>The following 3 properties are used to specify the Server URLs from where the requests to DCM, BIG, or NIPR originate. \$hostName refers to the host on which Business Manager is installed. \$dcmhostName refers to the server location where DCM is installed, and where the Web application used to integrate with the DCM server is hosted.</p>	
onboarding.server.dcmURL	<p>Valid value is</p> <p>http://\$hostName:18793/sbm/cxfws/DefaultDCMIntegrationServer/ <b>or</b></p> <p>http://\$dcmhostName:\$dcmport/DCMIntegrationServlet/sbm/cxfws/DCMIntegrationServer/</p>
onboarding.server.bigURL	<p>Valid value is</p> <p>http://\$hostName:18793/sbm/cxfws/DefaultBIGIntegrationServer/ <b>or</b></p> <p>http://\$dcmhostName:18793/sbm/cxfws/BIGIntegrationServer/</p>
onboarding.server.niprURL	<p>Valid value is</p> <p>http://\$hostName:18793/sbm/cxfws/DefaultNIPRIntegrationServer/ <b>or</b></p> <p>http://\$dcmhostName:18793/sbm/cxfws/NIPRIntegrationServer/</p>
<p>In the case when the BIG system stores the background check documents for producers at an FTP location, the following 4 properties provides details on how you can connect to the FTP server in order to retrieve the documents.</p>	
onboarding.big.ftp.url	The server name (or host IP address) of the FTP server.
onboarding.big.ftp.port	The port number of the FTP server.
onboarding.big.ftp.user	The user name to be used to connect to the FTP server.
onboarding.big.ftp.password	The user password to be used to connect to the FTP server.
<p>The following 2 properties are used to specify the Callback URLs when an asynchronous request is sent to BIG or NIPR. You must specify a valid URL, which can be accessed by BIG or NIPR servers in order to post the asynchronous response to your server.</p>	
big.response.url	<p>The response URL for BIG system. Valid value is</p> <p>http://\$hostName:18793/sbm/cxfws/BIGResponseServer/postBCResponse</p>

Property	Value
nipr.response.url	The response URL for NIPR. Valid value is <code>http://\$hostName:18793/sbm/cxfws/NIPRResponseServer/postNIPRResponse</code>
dcm.web.url	DCM server URL (format for the value of configuration parameter: <code>http://\$DCM_HOST:\$DCM_PORT</code> )
dcm.restapi.url	DCM server Rest API URL (format for the value of configuration parameter: <code>http://\$DCM_HOST:\$DCM_PORT/DMS/api/</code> )
dcm.api.ApiXAuthToken	DCM security token for access REST API exposed by DCM.
person.role	<p>Indicates the role(s) of the person party when a new person party gets created in DCM through the Onboarding process.</p> <hr/> <p><b>Note:</b> If you have to specify multiple values, then use   as separator.</p> <hr/>
organization.role	<p>Indicates the role(s) of the Organization party when a new organization party gets created in DCM through the Onboarding process.</p> <hr/> <p><b>Note:</b> If you have to specify multiple values, then use   as separator.</p> <hr/>
termination.appointment.status.code	<p>For an appointment being terminated through the Termination process, this indicates the status enum code for the appointment status of the terminated appointment.</p> <hr/> <p><b>Note:</b> You have to provide numeric value for the parameter from <code>enums.xml</code>.</p> <hr/>
termination.appointment.status.reason.code	<p>For an appointment being terminated through the Termination process, this indicates the status reason enum code for the appointment status reason of the terminated appointment.</p> <hr/> <p><b>Note:</b> You have to provide numeric value for the parameter from <code>enums.xml</code>.</p> <hr/>

Property	Value
<code>termination.agreement.status.code</code>	<p>For an agreement being terminated through the Termination process, this indicates the status enum code for the agreement status of the terminated agreement.</p> <hr/> <p><b>Note:</b> You have to provide numeric value for the parameter from <code>enums.xml</code>.</p> <hr/>
<code>termination.agreement.status.reason.code</code>	<p>For an agreement being terminated through the Termination process, this indicates the status reason enum code for the agreement status of the terminated agreement.</p> <hr/> <p><b>Note:</b> You have to provide numeric value for the parameter from <code>enums.xml</code>.</p> <hr/>
<code>termination.appointment.status.allowed</code>	<p>Provides the list of appointment status values that should be considered as active and eligible for termination. Only appointments with these statuses will be displayed for termination by the user.</p> <hr/> <p><b>Note:</b> If you want to set multiple values for this parameter, then provide the multiple values in a comma separated format. This property requires the numeric value for the parameter from <code>enums.xml</code>. (For example, using the stock status values: the status Active would be indicated in the property with the value 1, the Request Pending status would be indicated with the value 0).</p> <hr/>
<code>termination.agreement.status.allowed</code>	<p>Provides the list of agreement status values that should be considered as active and eligible for termination. Only agreements with these statuses will be displayed for termination by the user.</p> <hr/> <p><b>Note:</b> If you want to set multiple values for this parameter, then provide the multiple values in a comma separated format. This property requires the numeric value for the parameter from <code>enums.xml</code>. (For example, using the stock status values: the status Active would be indicated in the property with the value 0).</p> <hr/>

Property	Value
show.other.company.appointments	<p>The values are <code>true</code> and <code>false</code>.</p> <ul style="list-style-type: none"> <li>• <code>true</code> if you want to show other company appointments in OnBoarding and AddAppointment process.</li> <li>• Otherwise <code>false</code>.</li> </ul>
hierarchytransfer.agent.positiontypeid	<p>Agent positions to be shown in the hierarchy transfer process (when search for agent for transfer is done), use id value from <code>enums.xml</code>.</p> <hr/> <p><b>Note:</b> You can use multiple values in comma separated format if you want to set multiple values for this parameter.</p> <hr/>
hierarchytransfer.agency.positiontypeid	<p>Agents positions to be shown in the hierarchy transfer process (when search for agency for source and target is done), use id value from <code>enums.xml</code>.</p> <hr/> <p><b>Note:</b> You can use multiple values in comma separated format if you want to set multiple values for this parameter.</p> <hr/>
create.party.status	<p>Indicates the party status value to use when a new party is created in DCM through the Onboarding process.</p>
create.party.statusreason	<p>Indicates the party status reason value to use when a party is created in DCM through the Onboarding process.</p>
update.party.status	<p>Indicates the party status value to use when the Onboarding process updates the party data in DCM.</p>
update.party.statusreason	<p>Indicates the party status reason value to use when the Onboarding process updates the party data in DCM.</p>

Property	Value
dcmCreatePartyTimeout	<p>Indicates how long the GetLicensefrom NIPR step in the Onboarding process should wait before issuing a timeout error.</p> <hr/> <p><b>Note:</b> Value for this configuration parameter is in seconds.</p> <hr/>
dcmPartyCheckDelay	<p>The time delay between retries when creating a party in DCM during the GetLicensefrom NIPR step in the Onboarding process.</p> <hr/> <p><b>Note:</b> Value for this configuration parameter is in milli-seconds.</p> <hr/>

After running the Auto Deployment utility, you must complete the steps specified in [Configuring Tomcat server for IPM solution](#) on page 22, in order to integrate the IDEA package with the AIS solution.

## Executing Auto Deployment

To execute auto deployment of all projects:

1. Start the application servers.

For windows systems:

- Click **Start**.
- Select **Programs > CX Process > SBM<Version Number> > First Steps Console**.

The **First Steps Console** window appears.

2. Start all application servers.
3. From the `SBM_Home\apppackager\Insurance_Solution\bin` command prompt, execute `autoDeployInsurance.cmd` command for all projects.

This deploys all solution projects to the BusinessManager servers and generates the `AutoDeploy.log` file in the `SBM_Home\apppackager\Insurance_Solution\logs` folder.

## Verifying Auto Deployment

After running the auto deployment command, you can verify that it worked by reading the `<SBM_HOME>\apppackager\Insurance_Solution\logs\AutoDeploy.log` file. The log file should contain successful auto deployment messages. Additionally, you must login to BPM Portal and ensure that all solution-related BizLogic projects are available in the **Applications** tab.

## After Auto Deployment

To enable exception management in Aurea® Insurance Process Management, you must perform the following:

- If you have installed Business Manager with Pramati, JBoss®, or Weblogic as the application server, you must append the following code after the `set VM_ARGS=%SBM_LOG_VM_ARGS% -Dsbm.home=%SBM_HOME_UNIX%` code in the `sbmserverenv.cmd` file after running the Auto Deployment utility:

```
-Ddtg.home=%SBM_HOME_UNIX%/dtg
```

The `sbmserverenv.cmd` file is located in `SBM_Home\pramati\server\bin` folder (for Pramati), in `Weblogic_Domain` (for Weblogic), or `SBM_Home\jboss\bin` (for JBoss® Community Edition 5.1.0 or JBoss® Enterprise Edition 5.1.1).

- In the `SBM_HOME\conf\bizlogic.conf` file, add `com.savvion.exception.AutoExceptionPublisher` as the value of `publisher.senders.list` property, as shown below:
- ```
publisher.senders.list = com.savvion.sbm.eventpublisher.sender.JMSSender,
com.savvion.exception.AutoExceptionPublisher
```

- Append the following property at the end of the `SBM_HOME\conf\bizlogic.conf` file:

```
publisher.missingevents.retry.maxcount=1
```

For Business Manager installed on LDAP realm, you must create the following users and group manually after auto deployment:

**Table 7: LDAP users and groups**

|        |                                                                                              |
|--------|----------------------------------------------------------------------------------------------|
| Users  | AnalystUser1, AnalystUser2, ManagerUser1, ManagerUser2, AgentUser1, AgentUser2, sa, newwebms |
| Groups | AnalystGroup, ManagerGroup, Administrator, Analyst                                           |

After performing this, configure Tomcat server for IPM solution. For more information, refer [Configuring Tomcat server for IPM solution](#) on page 22.

## Configuring Tomcat server for IPM solution

After running the auto-deployment utility, you must deploy the Web application (`DCMIntegrationServlet.war`) used for DCM integration on the Tomcat application server installation on DCM installation machine. This war file is located in the `AIS_Home\webapp` folder.

**Perform the following:**

- Copy the `DCMIntezgrationServlet.war` file to the webapp folder in the Tomcat server installation folder on DCM installation machine.
- Start the Tomcat server, and wait for the server start up. Stop the Tomcat server.

Open the webapp folder to check if it contains the new `DCMIntegrationServlet` folder, with `META-INF` and `WEB-INF` sub-folders.

---

3. Copy the following JAR files from the Insurance\_Home\workspace\InsuranceSolutionsCR\InsuranceSolutionsCR\dxsi\_lib folder to the DCMIntegrationServlet\WEB-INF\lib folder:

- commons-httpclient.jar
- commons-logging.jar
- dlXMLConverters.jar
- DataXtendHibernate3.jar
- dataxtendsi.jar
- deployment\_package.default
- dxpostgresql.jar
- EDI.jar
- ehcache.jar
- ExchangeModel.jar
- ExchangeModelBusinessObjects.jar
- ExchangeModelControls.jar
- jms.jar
- jta.jar
- log4j.jar
- ojdbc5.jar
- postgresql.jdbc3.jar
- slf4j-dxsi.jar
- Trilogy.jar
- velocity.jar
- xbean.jar
- XMLCforDXSI.jar

4. Copy the following JAR files from the SBM\_HOME\lib folder to the DCMIntegrationServlet\WEB-INF\lib folder:

- actional-sdk.jar
- antlr.jar
- c3p0.jar
- commons-beanutils.jar
- commons-codec.jar
- commons-collections.jar
- commons-io.jar

- commons-jxpath.jar
  - commons-lang.jar
  - commons-vfs.jar
  - cxf.jar
  - dom4j.jar
  - hibernate3.jar
  - javassist.jar
  - jsr311-api.jar
  - neethi.jar
  - org.springframework.aop.jar
  - org.springframework.asm.jar
  - org.springframework.beans.jar
  - org.springframework.context.jar
  - org.springframework.context.support.jar
  - org.springframework.core.jar
  - org.springframework.expression.jar
  - org.springframework.jdbc.jar
  - org.springframework.orm.jar
  - org.springframework.transaction.jar
  - org.springframework.web.jar
  - org.springframework.web.servlet.jar
  - slf4j-api.jar
  - wsdl4j.jar
5. Copy the following JAR files from the SBM\_DOMAIN\WEB-INF\lib folder to the DCMIntegrationServlet\WEB-INF\lib folder:
- InsuranceSolutionsCR.jar
  - IPIntegrationServicesCR.jar
6. Copy the OnBoarding.conf file from SBM\_Home\conf folder to the DCMIntegrationServlet\WEB-INF\classes folder.



---

**Note:** Although the name indicates that this file only applies to Onboarding, it is actually used for configurations of all workflows.

---

7. Use the `ExtractModel.jar` file (available in the `DCMIntegrationServlet\WEB-INF\lib` folder of the deployed Web application) to update the `config.properties` and `DCMClassPath.properties` files, in order to configure the correct folder path of the `mcc` folder located in the DCM installation and the loader pack folders.
  - a) Extract the `ExtractModel.jar` file.
  - b) Update the following parameters in the `config.properties` file.

| Parameter                       | Value                                                |
|---------------------------------|------------------------------------------------------|
| <code>buildFile_location</code> | <code>\$MCC_HOME/build.xml</code>                    |
| <code>specsLocation</code>      | Folder location where DCM loader patch is installed. |
| <code>log4jProps</code>         | <code>\$MCC_HOME/resources/log4j.properties</code>   |
| <code>OUTPUT_DIR</code>         | <code>\$MCC_HOME/logs/DCMlogs</code>                 |
| <code>mccProps</code>           | <code>\$MCC_HOME /resources/mcc.properties</code>    |

where `$MCC_HOME` is the complete path of the `mcc` folder.

- c) Update the `DCMClassPath.properties` file and set the value for `MCCFORMULA_CLASSPATH` variable by replacing actual values for `$DCM_Tomcat_Home` and `$DCM_DBDriver_Path` variables given below:

```
MCCFORMULA_CLASSPATH=$DCM_Tomcat_Home/webapps/DMS14/WEB-INF/classes;
$DCM_Tomcat_Home/webapps/DMS14/WEB-INF/lib/*;
$DCM_Tomcat_Home/webapps/DMS14/WEB-INF/lib/plugins/com.trilogy.reporting.oda.oqlconnector/*;
$DCM_Tomcat_Home/webapps/DMS14/WEB-INF/lib/plugins/com.trilogy.reporting.oda.oqlconnector.ui/*;
$DCM_DBDriver_Path
```

For example, if your postgresql driver is present in `c:\installs` folder, value for `$DCM_DBDriver_Path` would be as follows: `C:/installs/pg74.216.jdbc3.jar`

- d) Re-create the `ExtractModel.jar` file with the modified `config.properties` and `DCMClassPath.properties` files.

---

**Note:** Ensure that for the Tomcat server, the JVM arguments are configured for the minimum heap size and maximum perm size. For example, `-Xmx512m -XX:MaxPermSize=512m`.

---

## Saving documents on SDMS

You can execute the `populateDocsToSDMS` utility to save producer documents on the specified SDMS location folder. In the Analyst-operated scenario (where the Analyst enters the producer details), the **Get Docs from DMS** adapter workstep in the OnBoarding process (as discussed in [Running the On-Boarding solution](#)) is executed to retrieve the saved documents from SDMS.

**Perform the following:**

1. After performing auto-deployment, navigate to the `SBM_HOME\bin` folder using command prompt.
2. Execute the `populateDocsToSDMS` utility as follows:

```
populateDocsToSDMS.cmd <SBM_HOME> <SDMS_folder_name> <source_folder>
```

where:

- <SBM\_HOME> is the complete Business Manager installation folder path.
- <SDMS\_folder\_name> is the name of the producer-specific folder, which is created in SDMS and is used to store the documents. The folder name must have the following format:
  - For "Person" party: <Last 4 digits of the party Tax ID>+"\_"+"<Last Name>". For example "1234\_Jackson" where "1234" are the last 4 digits of the Tax ID of the producer with last name, "Jackson."
  - For "Organization" party: <Last 4 digits of the party Tax ID>+"\_"+"<Party Name>". For example "1234\_XYZ" where "1234" are the last 4 digits of the Tax ID of the insurance agency with party name, "XYZ."
- <source\_folder> is the complete folder path on your machine, which stores the producer documents to be uploaded.

On successful execution of the `populateDocsToSDMS` utility, all documents stored in the <source\_folder> are uploaded to the specified folder on SDMS. If this utility is executed multiple times for the same SDMS folder, all existing documents in the SDMS folder are deleted and replaced with the new set of documents.

## Manual Steps for Websphere Application Server

---

**Important:** If SBM server is installed with WebSphere application server, then you need to perform following steps manually to complete the installation process.

---

1. Deploy the following BizRules applications manually using `bradmin` command available in `SBM_Home/bin` folder.
  - `DisputeResolutionLMRules_V1`
  - `DRQCCEvaluationRules_V1`
  - `OnBoardingGetDocRules_V1`
  - `OnBoardingLMRules_V1`
  - `OnBoardingSelectAgreements_V1`
2. Backup (rename) or delete all temporary folders like `temp`, `wstemp` folders.

---

**Note:** For this you need to stop the servers and then re-start.

---

3. To add gmail to the Websphere trust store, perform the following steps:

---

**Note:** You will need `server1` stated for this, you need to start all servers and perform this step, after that you need to stop and re-start all servers.

---

- a) Log into the administrative console.
- b) Expand **Security** and click **SSL Certificate and Key Management**.
- c) Under Configuration settings, click **Manage Endpoint Security Configurations**.
- d) Select the appropriate outbound configuration to get to the (cell):  
`SBM2017Cell:(node):SBM2017Node` management scope.
- e) Under **Related Items**, click **Key stores and certificates** and select the **NodeDefaultTrustStore** key store.

- f) Under **Additional Properties**, click **Signer certificates and Retrieve From Port**.
- g) In the **Host** field:
  - Enter **smtp.gmail.com** in the host name field.
  - Enter **465** in the Port field.
  - Enter **smtp.gmail.com\_cert** in the Alias field.
- h) Click **Retrieve Signer Information**.
- i) Verify that the certificate information is for a certificate that you can trust.
- j) Click **Apply** and then click **Save**.

## Running Servers Outside the User Account in WebSphere

Perform the following to run the IPM servers outside of the user account in WebSphere:

1. Install tomcat as a service instead of as a bin copy on the server. Add tomcat start to Automatic start in windows services.
2. Add SBM WebSphere profile to start as a Windows service.
3. Use Windows scheduler to run `EJBServer.bat` and `PortalServer.bat` on system start-up (with a 15 minutes delay).

## Enabling IPM as a tab in DCM

To install the IPM module to run as on a tab in DCM, perform the following:

1. Run the following command in DCM:

```
ant -Denvironment=DCM Install
dcminstall.bat <MCC_HOME> DCM IPM
```

---

**Important:** If you are using IPM and Business Insights reporting, then use the following command to install both:

```
ant -Denvironment=DCM -DIPMInstall=true -DBusinessInsightsInstall=true Install
```

---

2. After installing of `setup.jar` and prior to generation of `DMS.war` in DCM, update `IPM.properties` file in `MCC_HOME\environments\templates\location`.
3. For example:
  - The URL of starting page to be displayed in DCM tab is `ipm.homeUri=https://localhost:18793`.
  - Redirect when user is unauthenticated in DCM to `ipm.unauthenticatedRedirectUri=/DMS/servlet/com.trilogy.fs.dms.ui.DMSAppPageServlet?AppName=DMS`

Refer *DCM Installation Guide* for more information.

4. After installation of IPM, update the following property file:
  - a) Navigate to `OnBoarding.conf` file in `SBM_HOME\conf\location`.
  - b) Update the property `dcm.web.url` to `http://localhost:9082`

## Setting up LDAP for IPM

IPM supports authentication with LDAP realm. It is possible to use the same users for both DCM and IPM.

To configure IPM with LDAP, refer to *Chapter 4: Installing Aurea® CX Process Business Manager software > Specifying User Management Realm details* section in *CX Process Installation Guide* for more information.

Set the following LDAP group names in properties for IPM roles resolution in the file `solution.conf` in `SBM_HOME\conf\ location`:

```
solution.role.names=Analyst,Manager,Compliance,Agent,Agency,Administrator
solution.role.group.Analyst=AnalystGroup
solution.role.group.Manager=ManagerGroup
solution.role.group.Compliance=ComplianceGroup
solution.role.group.Agent=AgentGroup
solution.role.group.Agency=AgencyGroup
solution.role.group.Administrator=Administrator
```

## Prerequisites for uninstalling Aurea® Insurance Process Management

Before you uninstall Aurea® Insurance Process Management, you need to ensure that the following requirements are met:

1. For Business Manager configured with dual realm, you must revert to the realm configured before Aurea® Insurance Process Management was installed.
2. Before you start uninstallation process, you need to uninstall all the installed process models manually using BPM Portal.

## Uninstalling Aurea® Insurance Process Management

You can use the Uninstaller wizard to uninstall Aurea® Insurance Process Management from your machine.

**To uninstall Aurea® Insurance Process Management:**

1. Save and close any open applications.

---

**Note:** Before you start the Uninstaller Wizard for uninstalling Aurea® Insurance Process Management, ensure that all the servers are shut down.

---

2. Click **Start** on the Task bar, then select **Programs > Aurea > IPM > Uninstall** to begin the uninstall process.
3. From the Uninstall Welcome page, review the text and click **Next**.

4. Review the Aurea® Insurance Process Management installation settings in the **Uninstallation Confirmation** page. Click **Uninstall** to accept the settings and start uninstalling Aurea® Insurance Process Management. Click **Cancel** to end the Aurea® Insurance Process Management uninstallation and exit the Installation wizard.
5. Click **Yes to All** in the Remove Existing File prompt.
6. From the **Uninstallation Summary** page, click **Finish** to complete the uninstallation process and exit the Installation wizard.

After uninstalling Aurea® Insurance Process Management, the Uninstaller wizard deletes all the files and folders copied by the Installation wizard (as listed in [Table 5](#) on page 13) from the respective folders and replaces each file with the corresponding backup file (with \*.ins.bak extension).

The Uninstaller wizard also uninstalls the business accelerator components.

