



Duck Creek  
Technologies

# Anywhere Managed Integrations Process Overview

August 2020

# AMI Processes

- ▶ Product Overview
- ▶ Onboarding
- ▶ Deployment
- ▶ Configuration
- ▶ Go-Live and Support



# Anywhere Managed Integrations

## – Product Overview

# Anywhere Managed Integrations

- ▶ Productized, subscription-based integrations to leading third-party services that
  - ▶ Provides carrier configurable components and features to meet business needs and designated workflow
  - ▶ Includes sample behaviors and UI components depending on integration
- ▶ Fully managed and maintained by Duck Creek
- ▶ Available only via Duck Creek OnDemand

# The Value

- ▶ Pay-as-you-go access to key third-party resources without the technical burden - subscribe and Duck Creek handles the rest.
- ▶ Carrier-configurable components/features to meet business needs and designated workflow.
- ▶ Reduced implementation and maintenance costs - The amount of time it takes to complete the integration is estimated at 0.5 – 5 days which is dependent on the AMI complexity level, specific integration and carrier's business requirements.
- ▶ Single SLA and support contact
- ▶ Duck Creek-managed updates for ensured currency

# Key Benefits

- ▶ All maintenance and implementation support handled by Duck Creek
- ▶ 24x7 Help Desk and Operations team to assist with reported issues
- ▶ Duplicate Check capabilities
  - No more duplicate calls to the vendor
  - No more additional transaction fees for data already received
- ▶ Big Data Integration
  - Save to carrier's Data Lake
- ▶ Available Reports:
  - Monthly: total calls, calls cached, successful calls, and calls with errors all by integration
  - Additional raw data can be requested by carrier

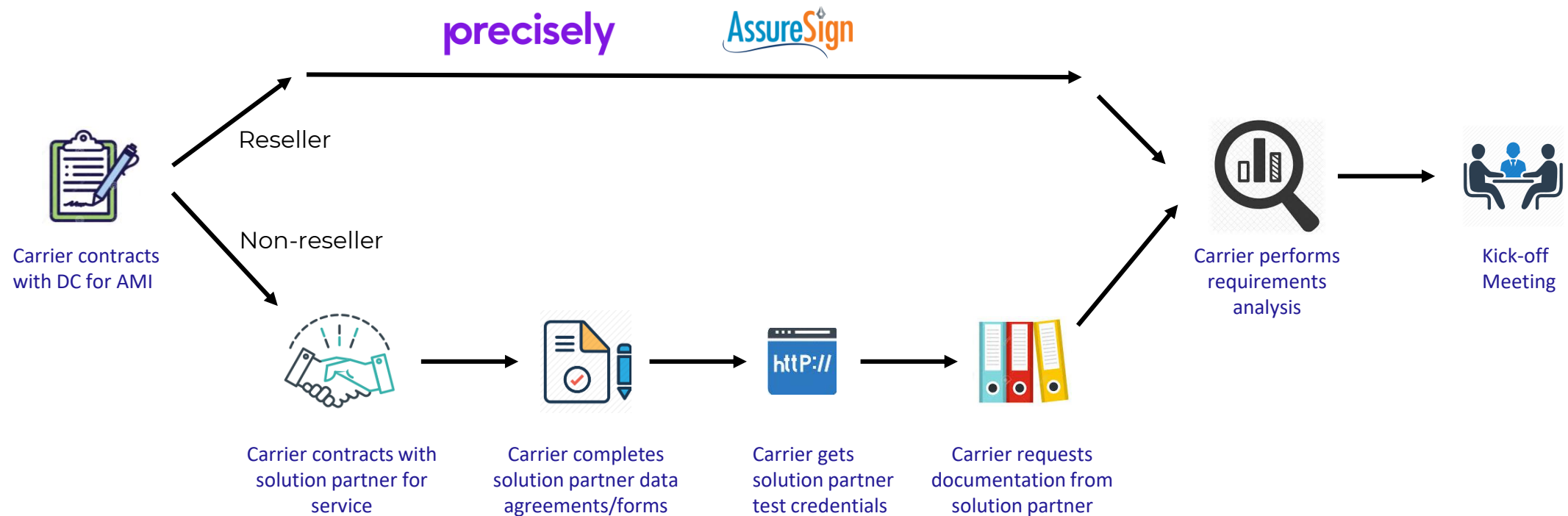
# Current Integrations



# AMI On-Boarding



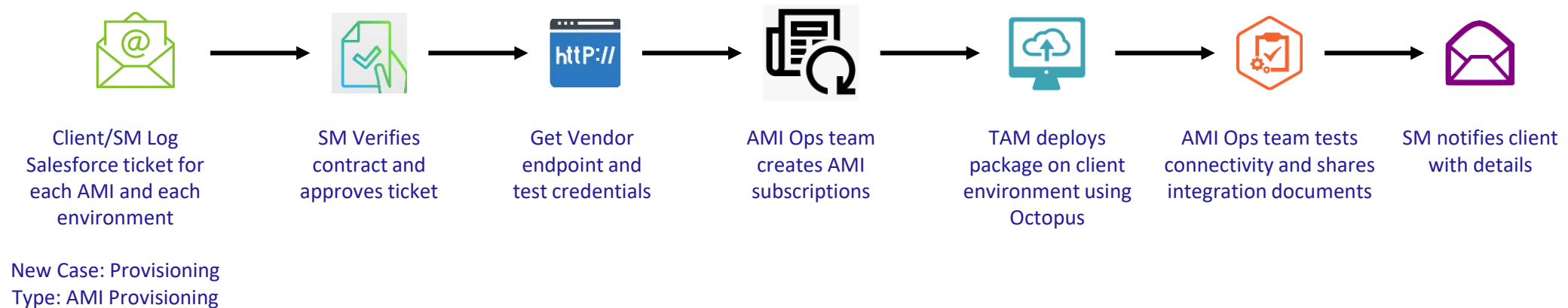
# AMI On-Boarding Process Flows



# AMI Deployment

The background features a dark blue field with abstract light blue geometric elements. In the top right, there is a large, light blue shape resembling a quarter-circle or a sector of a circle. A thin white line extends from the top edge of this shape, running diagonally down and to the left, then turning vertically down towards the bottom right corner of the frame. In the bottom left corner, there is a smaller, light blue triangular shape.

# AMI Initial Deployment – Client Development Environment



Production Deployment: Same Process, New Vendor Credentials

# AMI Configuration

# Package Deliverables

## **AMI Package deliverables**

Depending on the integration, the following contents can be included in the package file

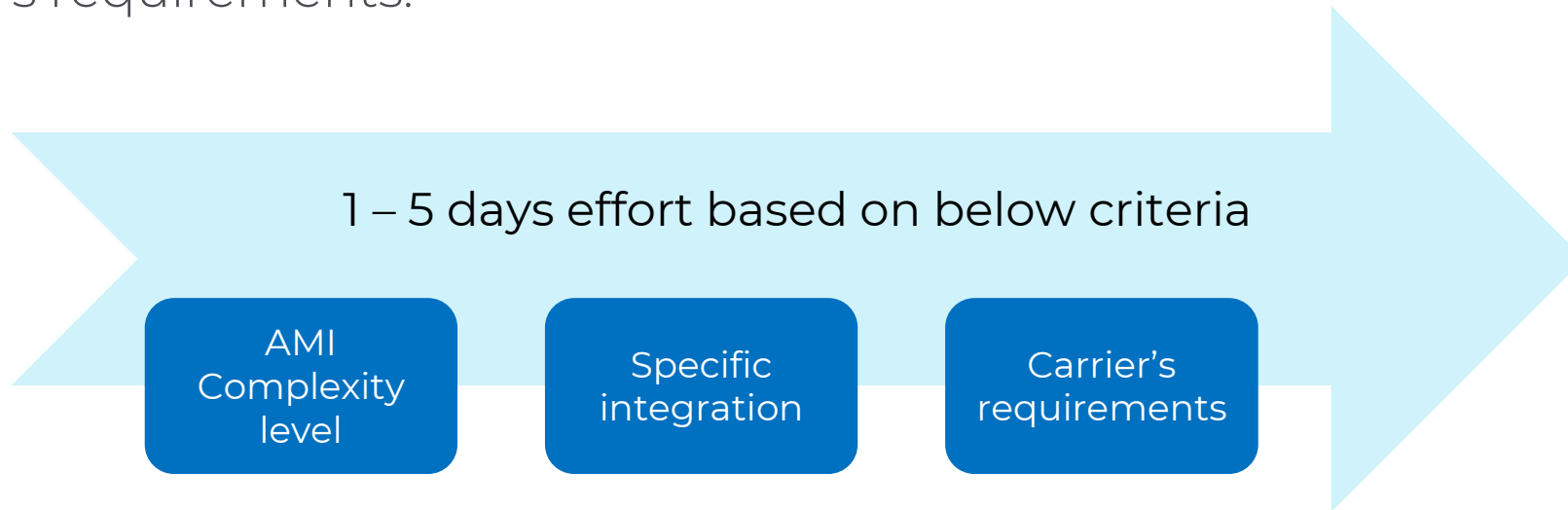
Depending on the integration, the following contents can be included in the package file

- Integration-specific manuscripts
- Schema files
- Sample requests and responses
- Report attachment samples (if applicable)
- Solution Center Documentation

Note: Any vendor specific documentation should be obtained directly from the vendor.

# Implementation Effort

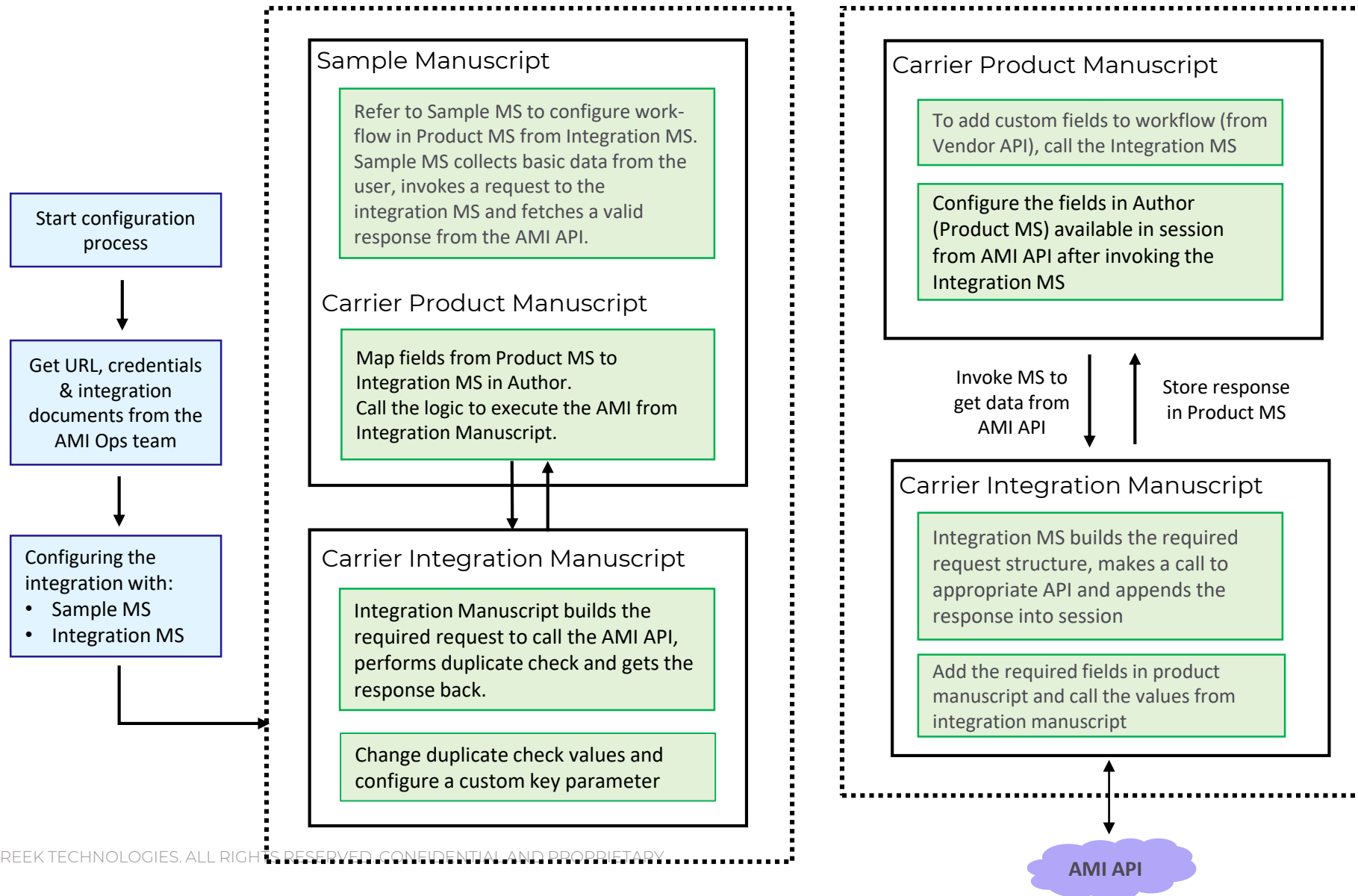
The components provided as part of the AMI will help reduce the overall time it should take to implement these integrations. The amount of time it takes to complete the integration will be dependent on the specific integration and carrier's requirements.



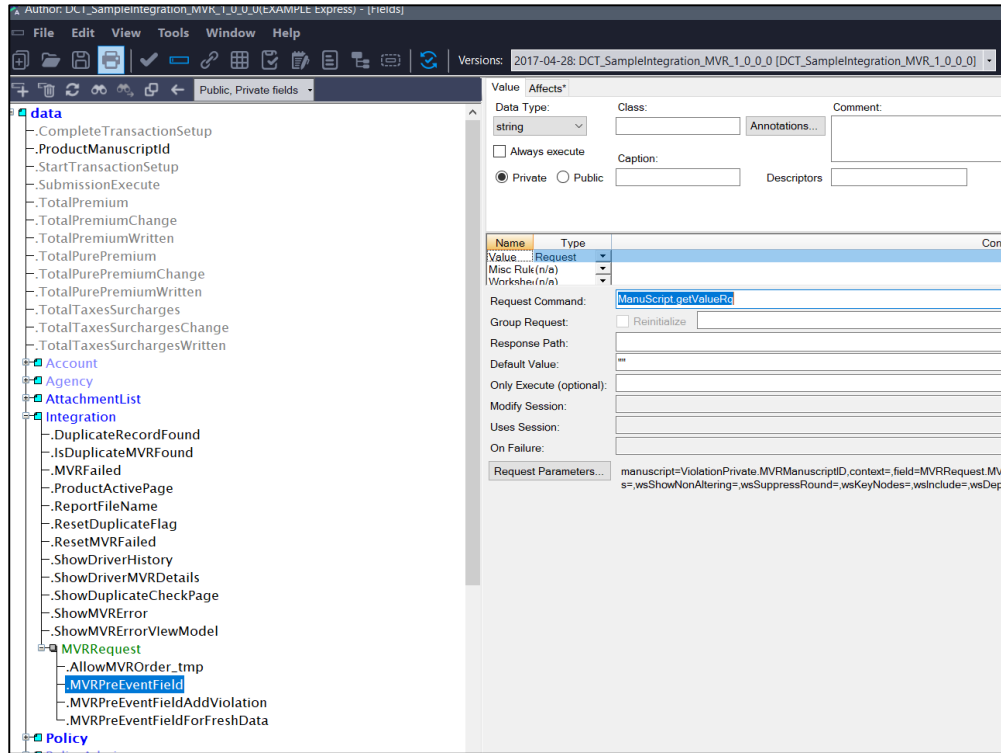
# Manuscript Configuration

## OOTB

## Custom

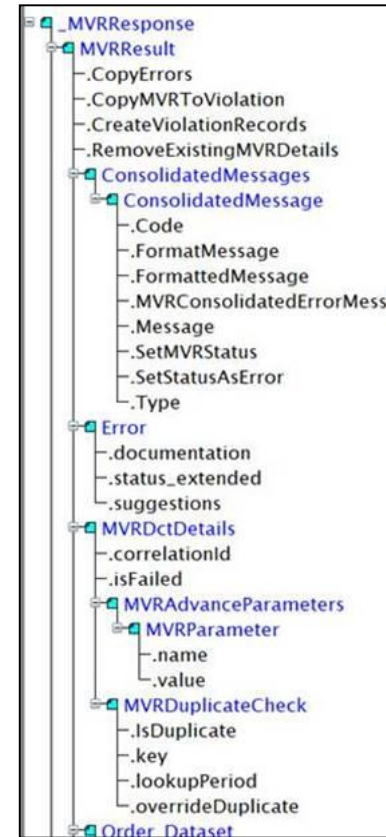


# Manuscript Configuration/Execution for MVR AMI



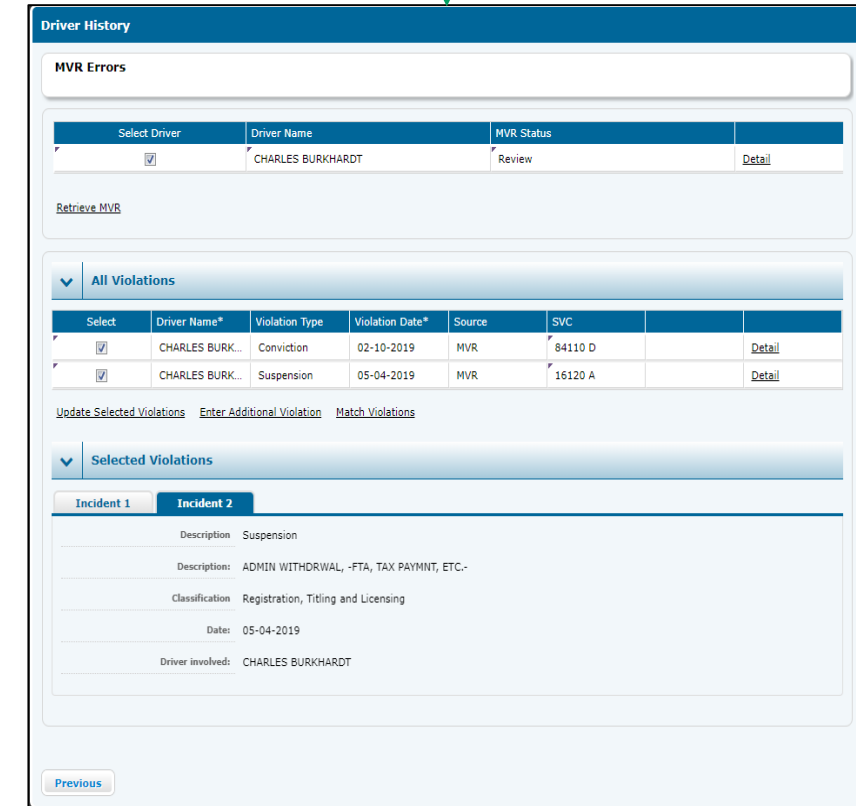
Sample MS/Product MS invokes Integration MS using a PreEvent field

	Type	Field
1	Pre-Effect	MVRRequest.GetDuplicateData
2	Pre-Effect	MVRRequest.ExecuteMVR
3	Pre-Effect	MVRRequest.IfNotDuplicateAddViolations



Integration MS gets the response from the AMI API and stores it in the session

Product MS creates the fields and maps the values from the session response and displays results on the UI





# Best practices for Manuscript Configuration

- ✓ **Do Not** create manual deployments – DCOD will deploy/install the AMI using Octopus.
- ✓ **Do Not** configure product manuscript to directly call either vendor API or OnDemand AMI API. The integration manuscript provides value-add functionality such as logic, error handling and cache control. Product manuscripts should call the integration manuscript to leverage these features.
- ✓ **Do** configure additional fields in the carrier integration manuscript as the base Integration manuscript will have fields that are only required for most business scenarios. The entire vendor API response is available in session elements if additional fields not in the base manuscript are required.
- ✓ **Do** client specific customization in Carrier Integration manuscript.
- ✓ **Do** leverage the sample manuscript to guide the implementation in carrier's product manuscript. The Sample manuscript provided with each AMI helps to understand the workflow of the AMI, and depending on the AMI, may provide sample UI and logic that can be reused.



# AMI Support & Maintenance

# AMI Support

## Incidents

DCOD triages all incidents reported

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- Engages vendor support teams if needed
- Engages SI/Client for
  - Customization issues
  - Direct vendor account issues
- Engages Engineering for code issues
- Fixes operational issues

## Requests

Only through Salesforce tickets

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- Deploy AMIs
- Clear Cache
- Reset Passwords
- Logs
- Usage Report
- Information request

# Maintenance

## Routine fixes

### API

### Maintenance

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- DCOD pushes regular fixes and enhancements
- DCOD will notify scheduled maintenance 10 days in advance
- For Sev1 or Outages
- Notification will be sent out to SMs as needed
- Log & Cache cleanup
- Upscale/downscale API infrastructure based on Performance needs.

### Base code

### Requires SI/Client engagement

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- Requires test/dev cycle in lower environments
- DCOD deploys updated package with fixes

# RACI Matrix – AMIs

	SM	DCOD	Client	Client's SI	Solution Partner
Contracts with DC for an AMI	A		R		
Contracts with Solution Partner & get credentials	I		R		R
Contract verification and request to install AMI on lower environment (via Salesforce ticket)	R		I		
Create AMI subscription with vendor credentials	I	R	C		
Installation of AMI components/package deployment	I	R	C		
Perform initial test to confirm connectivity		R	C		
Handover AMI to client and provide documentation	A	R	C		
AMI configuration to support business needs	I	C	R	R	
Custom Manuscript configuration to meet business needs	I	C	R	R	
Support needed to perform custom configuration	A	R	C	I	
Upgrades and enhancements		R			I
Scheduling and installing AMI updates		A	R		

# Further Resources

- ▶ <https://www.duckcreek.com/content-exchange/> → Filter on “Anywhere Managed Integrations”
- ▶ [https://solutioncenter.duckcreek.com/OnDemand/Duck\\_Creek\\_Anywhere\\_Managed\\_Integrations](https://solutioncenter.duckcreek.com/OnDemand/Duck_Creek_Anywhere_Managed_Integrations)

# FAQ

- ▶ Is there a different integration manuscript for each AMI?
  - Yes, each AMI comes with it's own integration manuscript
- ▶ Who does the upgrade to the carrier integration manuscript when there is an AMI upgrade?
  - When the client takes an upgrade, the carrier integration manuscript can be redeployed using Octopus. If configuration changes are expected, this will be coordinated with the carrier.
- ▶ Are we configuring base xslt filters etc for these AMIs out of the box to do any filtering of the response, or is all response filtering carrier's responsibility?
  - This is done for some AMIs like MVR, Auto CLUE etc. But not consistently done for all AMIs. This is an action item for AMI reengineering project.

# FAQs continued....

- ▶ Are we passing the entire content/payload from the vendor to the AMI response?
  - The most pertinent data elements are mapped to the Duck Creek data model, and are exposed in the sample UI provided. For carriers that need additional data elements, all the data from the vendor response are available in the session and can be configured by the carrier to be included in the integration manuscript.
- ▶ How much effort is involved in the implementation of an AMI?
  - The integration effort for any AMI ranges from 1 – 5 days depending on each AMI. This does not include the configuration of the solution partner system. For example, AssureSign and OnBase are each complex enterprise applications that required extensive configuration. The 1-5 day estimate is for configuring the integration, exclusive of configure the solution partner application.
- ▶ What monitoring is available on AMIs?
  - In the production domain, AMIs are monitored by the DCOD monitoring team. Salesforce tickets are automatically generated when performance is unusual.



# FAQs continued....

- ▶ What is the scope of error handling in the AMIs? (technical errors in request process or even specific data/metadata in the response based error handling). Would each AMI contain the documentation of the specific errors each handles?
  - AMI handles vendor specific errors and AMI system errors. The vendor errors are passed as is to the UI, and appropriate messages are passed for any technical errors like transformation issues etc. For vendor specific errors, please refer to the documentation provided by the vendor.
- ▶ Is there any way to get access to hands on training for all AMI's before purchasing? Demo environments etc?
  - You can reach out to solution consulting team as they have demos setup for most of the AMIs. AMI configuration related details are included in documentation that is available in Solution Center.
- ▶ How do I install the AMI on my local dev environment?
  - AMIs are only supported in the DCOD environments hence it is mandatory to do all configuration and testing on DCOD machines.