NIFI Setup and Run Data Loading Claim Apps (ICE, eClaim, EasyClaim)

Step-by-step guide

1. Check Configurations
2. Update Json files
3. CAS update Views (12 views)
4. Stop and Run
5. Log Checking
6. Debug Steps

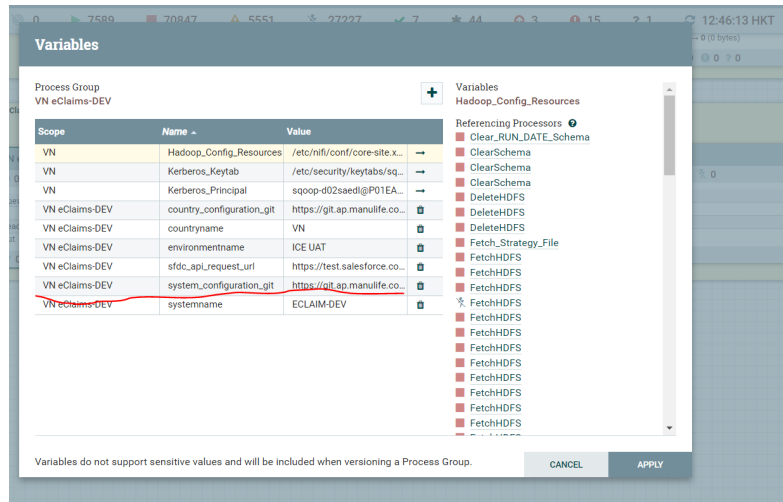> ⓘ NIFI Job will be loading data from database CAS to salesforce apps (ICE, eClaim, EasyClaim)

Environment	Cas Database	Sandbox Salesforce
DEV	DEV10	vnclaimsd4
SIT	DEV9	vniced1
UAT	UAT12	vneclaimu1
PreProd	UAT6	psfull

Link NIFI

- NiFi (manulife.com)
- Request SNOW for account login to NIFI

1. Check Configurations

   a. Check Variable of Nifi

   i.
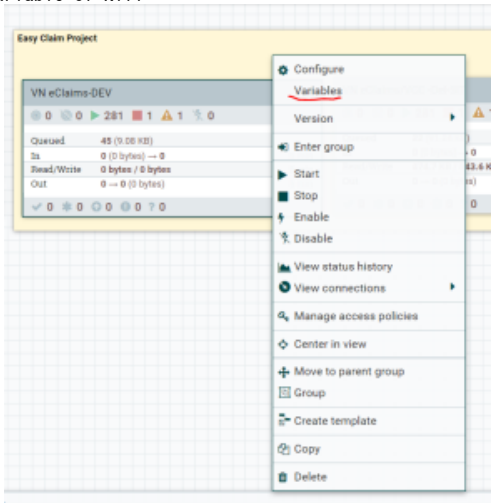
ii.
iii. link to json file (Setup mapping value from CAS to Salesforce Object)

2. Update Json files

a. Simple for Json link.

i. config / vn_easy_claim_sit.json

dev VN_CRM/vn_easy_claims

```
{
    "API":[
        {
            "ApiName":"Account",
            "httpMethod":"POST",
            "sourceSql":"select INTEGRATIONKEY,EXTERNALID,
SOURCESYSTEM,FATCAINDICATOR,GENDER,PERSONOTHERPHONE,PERSONEMAIL,
PERSONHOMEPHONE,PERSONMOBILEPHONE,NAME,PERSONBIRTHDATE,'RECORDTYPEID'
RECORDTYPEID,HasOptedOutOfEmail,NationalID,Occupation,Priority,
Descriptions from cas.vn_daily_account",
            "schemaName":"Account",
            "sourceFields":"INTEGRATIONKEY,EXTERNALID,
SOURCESYSTEM,FATCAINDICATOR,GENDER,PERSONOTHERPHONE,PERSONEMAIL,
PERSONHOMEPHONE,PERSONMOBILEPHONE,NAME,PERSONBIRTHDATE,RECORDTYPEID,
HASOPTEDOUTOFEMAIL,NATIONALID,OCCUPATION,PRIORITY,DESCRIPTIONS",
            "salesForceFields":"Integration_Key__c,
External_Id__c,Source_System__c,FATCA_Indicator__pc,Gender__pc,
PersonOtherPhone,PersonEmail,PersonHomePhone,PersonMobilePhone,LastName,
PersonBirthdate,RecordTypeId,PersonHasOptedOutOfEmail,National_ID_VCC__c,
Occupation__pc,Priority__c,Description",
            "salesForceRestUrl":"/services/data/v40.0/jobs
/ingest/",
            "ObjectAndOperation":"{\"object\":\"Account\",\"
operation\":\"upsert\",\"externalIdFieldName\":\"External_Id__c\"}",
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q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Account'+and+IsActive=true
+and+DeveloperName+='PersonAccount'",
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vnclaimsd4",
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SOURCESYSTEM,ACCOUNT,IDENTIFIER,EFFECTIVEPERIODSTARTDATE,
EFFECTIVEPERIODENDDATE,IDTYPE,ISSUEDPLACEID,NAME from cas.
vn_daily_acctregistration",
                              "schemaName":"Account_Registration__c",
                              "sourceFields":"INTEGRATIONKEY,EXTERNAL_ID,
SOURCESYSTEM,ACCOUNT,IDENTIFIER,EFFECTIVEPERIODSTARTDATE,
EFFECTIVEPERIODENDDATE,IDTYPE,ISSUEDPLACEID,NAME",
                              "salesForceFields":"Integration_Key__c,
External_Id__c,Source_System__c,Account__r.Integration_Key__c,
Identifier__c,Effective_Period_Start_Date__c,Effective_Period_End_Date__c,
ID_Type__c,Place_Of_Issue__c,Name",
                              "salesForceRestUrl":"/services/data/v40.0/jobs
/ingest/",
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Account_Registration__c\",\"operation\":\"upsert\",\"
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q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Account'+and+IsActive=true
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vnclaimsd4",
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SOURCESYSTEM,CONTACTMETHODTYPE,ADDRESS,ADDRESS2,ADDRESS3,POSTCODE,
CONTACTINSTRUCTIONS,ACCOUNTID,STATUS,REGION_CD,DISTRICT_CD,CITY_CD,
STATE_CD,COUNTRY_CD,'RECORDTYPEID' RECORDTYPEID from cas.
vn_daily_contactmethod",
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SOURCESYSTEM,CONTACTMETHODTYPE,ADDRESS,ADDRESS2,ADDRESS3,POSTCODE,
CONTACTINSTRUCTIONS,ACCOUNTID,STATUS,REGION_CD,DISTRICT_CD,CITY_CD,
STATE_CD,COUNTRY_CD,RECORDTYPEID",
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External_Id__c,Source_System__c,Contact_Method_Type__c,Address__c,
Address2__c,Address3__c,Post_Code__c,Contact_Instructions__c,Account__r.
Integration_Key__c,Status__c,Region_Name__c,District_Name__c,City_Name__c,
State_Name__c,Country_Name__c,RecordTypeId",
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/ingest/",
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vnclaimsd4",
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                        "MaxPriority":"12",
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                {
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IDENTIFIER__C,BANKBRANCHCODE,NAME,SOURCESYSTEM,EXTERNALID,ACCOUNT from
cas.vn_daily_afa",
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BANKBRANCHCODE,NAME,SOURCESYSTEM,EXTERNALID,ACCOUNT",
                        "salesForceFields":"Integration_Key__c,
Identifier__c,Bank_Branch__r.Integration_Key__c,Name,Source_System__c,
External_Id__c,Account__r.Integration_Key__c",
                        "salesForceRestUrl":"/services/data/v40.0/jobs
/ingest/",
                        "ObjectAndOperation":"{\"object\":\"
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externalIdFieldName\":\"Integration_Key__c\"}",
                        "recordTypeIdUrl":"/services/data/v42.0/query/?
q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Account'+and+IsActive=true
+and+DeveloperName+='PersonAccount'",
                        "batchSize":50000,
                        "operation":"UPSERTII",
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vnclaimsd4",
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                          "httpMethod":"POST",
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CONTACTMETHODID as EXTERNALID,ACCOUNTID from cas.vn_daily_cpp",
                          "schemaName":"ContactPurposePreference",
                          "sourceFields":"CONTACTMETHODID,OPTINOUT,
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Integration_Key__c",
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q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Policy_Reference__c'+and+I
sActive=true+and+DeveloperName+='Rider'",
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z2Qb9jGeuEcKMuV1TL3hS52JRSM71",
                          "client_secret":"
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vnclaimsd4",
                          "password":"Manulife6!",
                          "APIPriority":"5",
                          "MaxPriority":"12",
                          "Source":"oracle",
                          "Missing":""
                  },
                  {
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vn_daily_par_delete",
              "schemaName":"Policy_Account_Role__c_delete",
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              "api":"Policy_Account_Role__c",
              "salesForceFields":"Integration_Key__c",
              "salesForceRestUrl":"/services/data/v40.0/jobs/ingest/",
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\"operation\":\"delete\",\"externalIdFieldName\":\"Integration_Key__c\"}",

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            "recordTypeIdUrl":"/services/data/v42.0/query/?
q=SELECT+Id+FROM+RecordType+where+sobjecttype='Policy_Reference__c'+and+Is
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            "cdcCondition":"",
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vnclaimsd4",
                        "password":"Manulife6!",
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        },
        {
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/ingest/",
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Integration_Key__c\"}",
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q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Policy_Reference__c'+and+I
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                        "cdcCondition":"",
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z2Qb9jGeuEcKMuV1TL3hS52JRSM71",
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vnclaimsd4",
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            {
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POLICYNUMBER,AGENTCODE,POLICYSTATUS,BASICPLANCODE,SOURCESYSTEM,
```

PAYMENTMODE,EFFECTIVEDATE,SUBMISSIONDATE,TERMINATIONDATE,MATUREDATE,
PAYMENTDUEDATE,BASICPLANNAME,ACCOUNTFINANCIALACCOUNTID,
PLAN_REVISION,'RECORDTYPEID' RECORDTYPEID,AGENTNAME,COLLECTORCODE,
COLLECTORNAME,FACEAMOUNT,PLANPREMIUM,DISCOUNTPREM,BILLTODATE,
POLICYISSUEDATE,LASTAVYDATE,TOTALPREMIUM,POLICYNAME,LINEOFBUSINESS from
cas.vn_daily_polbasic_withbank",
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AGENTCODE,POLICYSTATUS,BASICPLANCODE,SOURCESYSTEM,PAYMENTMODE,
EFFECTIVEDATE,SUBMISSIONDATE,TERMINATIONDATE,MATUREDATE,PAYMENTDUEDATE,
BASICPLANNAME,ACCOUNTFINANCIALACCOUNTID,PLAN_REVISION,RECORDTYPEID,
AGENTNAME,COLLECTORCODE,COLLECTORNAME,FACEAMOUNT,PLANPREMIUM,DISCOUNTPREM,
BILLTODATE,POLICYISSUEDATE,LASTAVYDATE,TOTALPREMIUM,POLICYNAME,
LINEOFBUSINESS",
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Policy_Number__c,Agent_Code__c,Policy_Status__c,Basic_Plan_Code__c,
Source_System__c,Payment_Mode__c,Effective_Date__c,Submission_Date__c,
Termination_Date__c,Mature_Date__c,Payment_Due_Date__c,Basic_Plan_Name__c,
Account_Financial_Account__r.Integration_Key__c,plan_revision__c,
RecordTypeId,Agent_Name__c,Collector_code__c,Collector_Name__c,
Face_Amount__c,Plan_Premium__c,Discount_Premium__c,Bill_To_Date__c,
Issue_Date__c,last_AVY_Date__c,Total_Premium_Amount__c,Name,
LineOfBusiness__c",
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DE43A1CEAAE7EF77B47ECBB4766E29EF014C6E907C3E42F60061DC638E238A8F",
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vnclaimsd4",
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PAYMENTMODE,EFFECTIVEDATE,SUBMISSIONDATE,TERMINATIONDATE,MATUREDATE,
MATUREAMOUNT,PAYMENTDUEDATE,BASICPLANNAME,PLAN_REVISION,'RECORDTYPEID'
RECORDTYPEID,POLICYISSUEDATE,FACEAMOUNT,PLANPREMIUM,DISCOUNTPREM,
BILLTODATE,AGENTNAME,COLLECTORCODE,COLLECTORNAME,LASTAVYDATE,TOTALPREMIUM,
POLICYNAME,POLICYSTATUSCODE,LINEOFBUSINESS from cas.
vn_daily_polbasic_withoutbank",

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EFFECTIVEDATE,SUBMISSIONDATE,TERMINATIONDATE,MATUREDATE,MATUREAMOUNT,
PAYMENTDUEDATE,BASICPLANNAME,PLAN_REVISION,RECORDTYPEID,POLICYISSUEDATE,
FACEAMOUNT,PLANPREMIUM,DISCOUNTPREM,BILLTODATE,AGENTNAME,COLLECTORCODE,
COLLECTORNAME,LASTAVYDATE,TOTALPREMIUM,POLICYNAME,POLICYSTATUSCODE,
LINEOFBUSINESS",
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Policy_Number__c,Agent_Code__c,Policy_Status__c,Basic_Plan_Code__c,
Source_System__c,Payment_Mode__c,Effective_Date__c,Submission_Date__c,
Termination_Date__c,Mature_Date__c,Policy_Maturity_Amount__c,
Payment_Due_Date__c,Basic_Plan_Name__c,plan_revision__c,RecordTypeId,
Issue_Date__c,Face_Amount__c,Plan_Premium__c,Discount_Premium__c,
Bill_To_Date__c,Agent_Name__c,Collector_code__c,Collector_Name__c,
last_AVY_Date__c,Total_Premium_Amount__c,Name,Policy_Status_Code__c,
LineOfBusiness__c",
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Policy_Reference__c\",\"operation\":\"upsert\",\"externalIdFieldName\":\"
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q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Policy_Reference__c'+and+I
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vnclaimsd4",
                                "password":"Manulife6!",
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EFFECTIVEDATE,SUBMISSIONDATE,TERMINATIONDATE,MATUREDATE,MATUREAMOUNT,
PAYMENTDUEDATE,BASICPLANNAME,PARENTPOLICYID,PLAN_REVISION,POLICYISSUEDATE,
AGENTNAME,COLLECTORCODE,COLLECTORNAME,FACEAMOUNT,PLANPREMIUM,DISCOUNTPREM,
BILLTODATE,POLICYNUMBER as POLICYNAME,POLICYSTATUSCODE from cas.
vn_daily_policyrider",
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AGENTCODE,POLICYSTATUS,BASICPLANCODE,SOURCESYSTEM,PAYMENTMODE,
EFFECTIVEDATE,SUBMISSIONDATE,TERMINATIONDATE,MATUREDATE,MATUREAMOUNT,
PAYMENTDUEDATE,BASICPLANNAME,PARENTPOLICYID,PLAN_REVISION,POLICYISSUEDATE,
AGENTNAME,COLLECTORCODE,COLLECTORNAME,FACEAMOUNT,PLANPREMIUM,DISCOUNTPREM,
BILLTODATE,POLICYNAME,POLICYSTATUSCODE",

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Policy_Number__c,Agent_Code__c,Policy_Status__c,Basic_Plan_Code__c,
Source_System__c,Payment_Mode__c,Effective_Date__c,Submission_Date__c,
Termination_Date__c,Mature_Date__c,Policy_Maturity_Amount__c,
Payment_Due_Date__c,Basic_Plan_Name__c,Parent_Policy__r.
Integration_Key__c,plan_revision__c,Issue_Date__c,Agent_Name__c,
Collector_code__c,Collector_Name__c,Face_Amount__c,Plan_Premium__c,
Discount_Premium__c,Bill_To_Date__c,Name,Policy_Status_Code__c",
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/ingest/",
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sActive=true+and+DeveloperName+='Rider'",
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vnclaimsd4",
                              "password":"Manulife6!",
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                              "Missing":""
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                    {
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vn_daily_pcm_insert",
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POLICYCONTACTPURPOSE,CONTACTMETHODID,POLICYID",
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Policy_Contact_Purpose__c,Contact_Method__r.Integration_Key__c,Policy__r.
Integration_Key__c",
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q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Policy_Reference__c'+and+I
sActive=true+and+DeveloperName+='BasicPolicy'",
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                              "cdcCondition":"",
                              "client_id":"
3MVG910YPh8zrcR1yVy5MQ5lXnawgmzMXvm14JK73kIKvi_YYnPeZvj.

```
z2Qb9jGeuEcKMuV1TL3hS52JRSM71",
                    "client_secret":"
DE43A1CEAAE7EF77B47ECBB4766E29EF014C6E907C3E42F60061DC638E238A8F",
                    "username":"data_ingestion@manulife.com.vn.
vnclaimsd4",
                    "password":"Manulife6!",
                    "APIPriority":"11",
                    "MaxPriority":"12",
                    "Source":"oracle",
                    "Missing":""
            },
            {
                    "ApiName": "Policy_Account_Role__c",
                    "httpMethod": "POST",
                    "sourceSql": "select INTEGRATIONKEY,POLICYID,
ACCOUNTID,ROLE,RELATIONSHIPTOINSURED,PERCENTAGE,FROMDATE,TODATE from cas.
vn_daily_par_insert",
                    "schemaName": "Policy_Account_Role__c",
                    "sourceFields": "INTEGRATIONKEY,POLICYID,
ACCOUNTID,ROLE,RELATIONSHIPTOINSURED,PERCENTAGE,FROMDATE,TODATE",
                    "salesForceFields": "Integration_Key__c,Policy__r.
Integration_Key__c,Account__r.Integration_Key__c,Role__c,
Relationship_To_Insured__c,Role_Percentage__c,Start_Date__c,End_Date__c",
                    "salesForceRestUrl": "/services/data/v40.0/jobs
/ingest/",
                    "ObjectAndOperation": "{\"object\":\"
Policy_Account_Role__c\",\"operation\":\"upsert\",\"externalIdFieldName\":
\"Integration_Key__c\"}",
                    "recordTypeIdUrl": "/services/data/v41.0/query/?
q=SELECT+Id+FROM+RecordType+where+sobjecttype+='Policy_Reference__c'+and+I
sActive=true+and+DeveloperName+='BasicPolicy'",
                    "batchSize": 50000,
                    "operation": "UPSERTII",
                    "Runtype": "FullLoad",
                    "cdcCondition": "",
                    "client_id":"
3MVG910YPh8zrcR1yVy5MQ5lXnawgmzMXvm14JK73kIKvi_YYnPeZvj.
z2Qb9jGeuEcKMuV1TL3hS52JRSM71",
                    "client_secret":"
DE43A1CEAAE7EF77B47ECBB4766E29EF014C6E907C3E42F60061DC638E238A8F",
                    "username":"data_ingestion@manulife.com.vn.
vnclaimsd4",
                    "password":"Manulife6!",
                    "APIPriority":"12",
                    "MaxPriority":"12",
                    "Source": "oracle",
                    "Missing":""
            }
        ]
}
```

ii. Update user ingestion to salesforce.

```
"username":"data_ingestion@manulife.com.vn.vnclaimsd4",
"password":"Manulife6!",
```

3. CAS update Views (12 views)

| |
|---|
| cas.vn_daily_account |
| cas.vn_daily_acctregistration |
| cas.vn_daily_contactmethod |
| cas.vn_daily_afa |
| cas.vn_daily_cpp |
| cas.vn_daily_par_delete |
| cas.vn_daily_policy_rider_del |
| cas.vn_daily_polbasic_withbank |
| cas.vn_daily_polbasic_withoutbank |
| cas.vn_daily_policyrider |
| cas.vn_daily_pcm_insert |
| cas.vn_daily_par_insert |

a. Need to setup new table cas.tpol_temp for list policys need to ingestion to SF.

    a. create table CAS.TPOL_TEMP

```
(
pol_num VARCHAR2(20)
); create index POL_TEMP_IDX on CAS.TPOL_TEMP (POL_NUM);
```

4. Stop and Run NIFI

5.   **a.** Insert data to table cas.tpol_temp
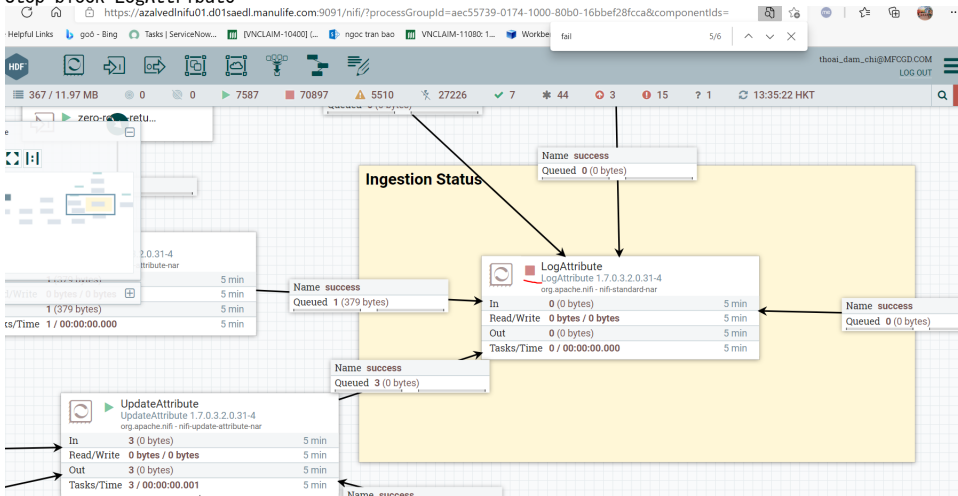   **b.** Edit view to just query all pol_num in (select pol_num from CAS.Tpol_temp)
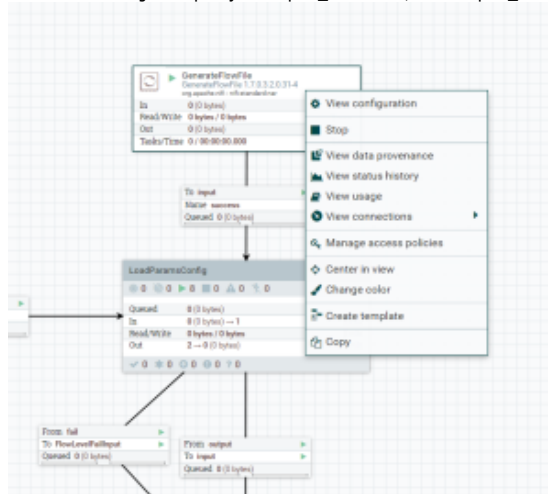
  c.
  d. right click and pick Stop
  e. right click and pick Start
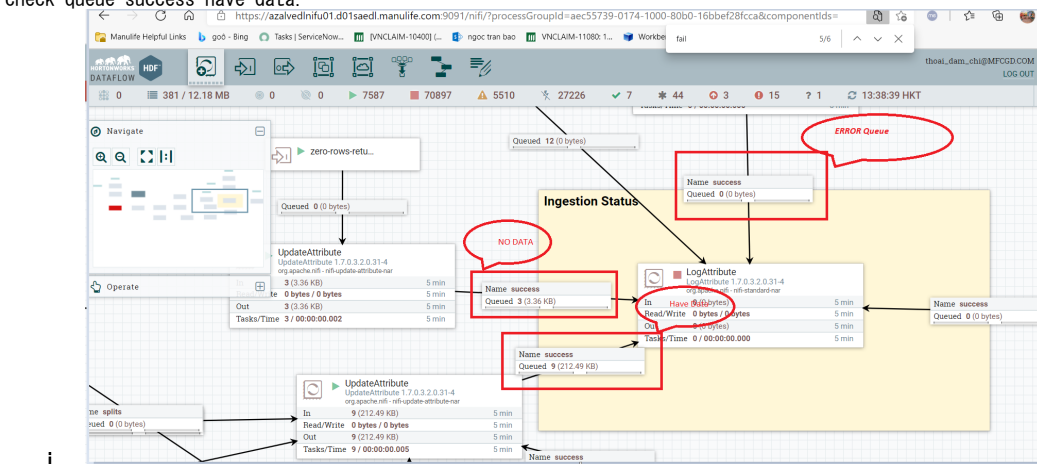 **f.** NIFI job auto run.

6. Log Checking

a.
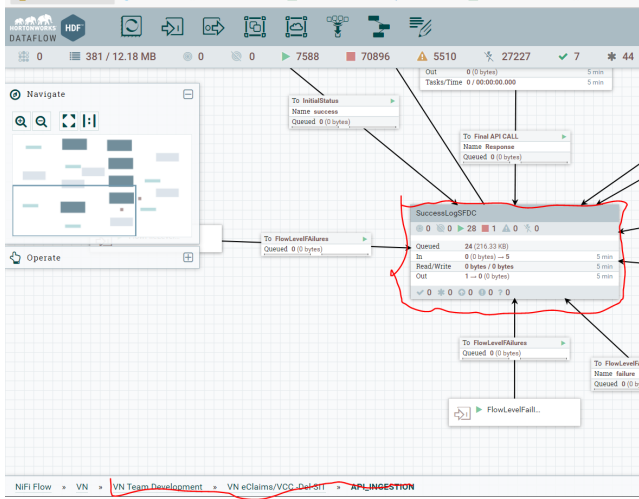
b. goto – NiFi Flow » VN » VN Team Development » VN eClaims/VCC –Del-SIT » API_INGESTION » SuccessLogSFDC

c. empty all queues in this block.

d. Stop block LogAttribute

e.

f. check queue success have data.

i.

7. Debug Steps

a. Stop all Block and start step by step to track queues err or sucess.

- NIFI Setup and Run Data Loading Claim Apps (ICE, eClaim, EasyClaim)